



MAX
MRI Application eXchange

MAX Esusu Monthly File Export

MAX Esusu Monthly File



Explanation:

This is a custom report to track rent payments and outstanding rent balances for Esusu. The report will pull the information from Bostonpost and should be exported as a CSV file.

Print Out: Sample of data after being exported from Bostonpost as a CSV.

```
"Property ID","Unit ID","Lease ID","Resident ID","First Name","Middle Name","Last Name","Phone Number","Phone Type","Email","SSN","DOB","Address 1","Address 2",
6,104,"28145229",482,"Heather",,"Maranda",,"999999999","Home Number",,"test123@outlook.com",,"0123456789",1950-01-05,"1234 Solar Street",,"CA",,"12345",2023-11-01,2
6,109,"15445198",281,"Michael",,"Running",,"999999999","Cellular Phone",,"test123@gmail.com",,"0123456789",1952-01-01,"1234 Solar Street",,"CA",,"12345",2023-10-01,
6,109,"15445548",281,"Michael",,"Running",,"999999999","Cellular Phone",,"test123@gmail.com",,"0123456789",1952-01-01,"1234 Solar Street",,"CA",,"12345",2024-09-15,
6,157,"17645428",310,"Betsy",,"Glen",,"999999999","Work Number",,"test123@aol.com",,"0123456789",1935-02-13,"1234 Solar Street",,"Test",,"CA",,"12345",2024-05-18,2025
6,157,"17645428",310,"Betsy",,"Glen",,"999999999","Work Number",,"test123@aol.com",,"0123456789",1935-02-13,"1234 Solar Street",,"Test",,"CA",,"12345",2024-05-18,2025
6,161,"15845534",285,"Megan",,"Underwood",,"999999999",1971-11-26,"1234 Solar Street",,"CA",,"12345",2024-09-01,2024-09-30,965.00,0.00,"Rent",2024-09-01,965.00
```


```
"State","Zip","Lease Start Date","Lease End Date","Lease Monthly Rent","Current Lease Balance Outstanding","Payment Type","Payment Date","Payment Amount","Monthly Lease"
024-10-31,1110.00,1110.00,"Rent",,,0
2024-09-14,990.00,0.00,"Rent",2024-09-01,990.00,0
2025-09-14,990.00,0.00,"Rent",2024-09-01,990.00,0
-05-17,978.00,278.00,"Rent",2024-09-01,300.00,0
-05-17,978.00,278.00,"Rent",2024-09-12,400.00,0
,1
```

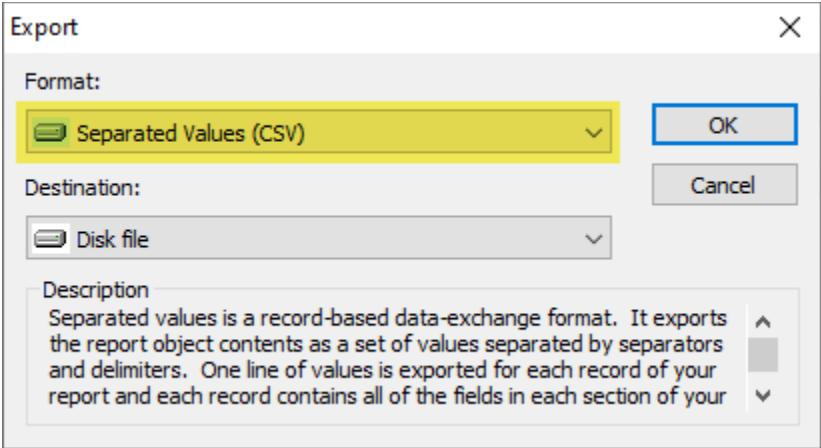
How to add this Report your database:

- 1) Download the [MAX_esusu_monthly.sql](#) script and PDF instructions from the MAX.
- 2) Attach the SQL script and PDF instructions files to a Support Case and include the following information.
 - a. Please run MAX_esusu_monthly.sql in my database to load Esusu Monthly File Export.
 - b. PM Object Editor
 - Main Menu > Property Manager > Reports > Select Report > Select Report
 - Sort Object Children by ID (click ID header)
 - Right click to insert new object row
 - ID must be 9 digits, must start with 4 and must be unique
 - ObjectName = max_esusu_monthly.rpt
 - Description = MAX Esusu Monthly File Export
 - Type = Report
 - Access Level by Community Status: full access for all types and levels
 - c. Assign user access by Role or Object
- 3) Wait for notification from support that your new Report has been enabled.

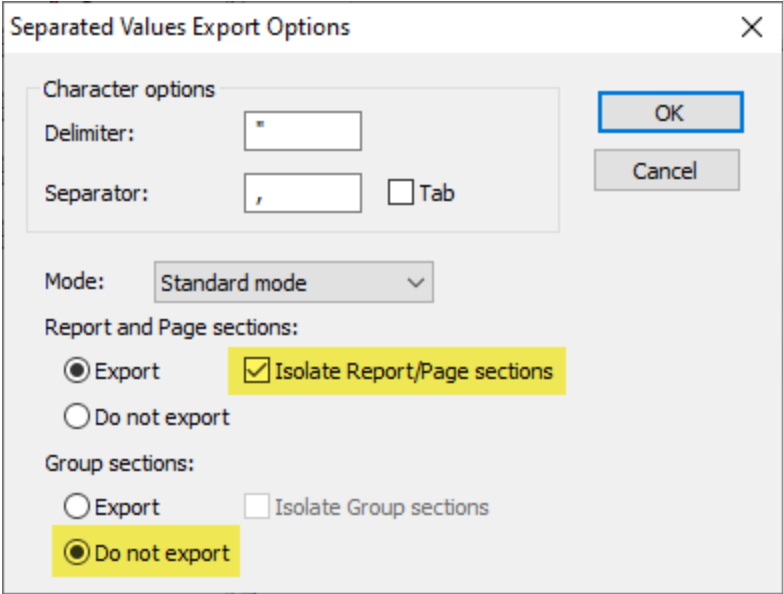
Running the Report:

- 1) To access your new Report
 - a. Open Property Manager
 - b. Navigate to Property Manager → Reports → Select Report
 - c. Expand the <Custom Reports> folder by clicking the + sign next to the words <Custom Reports>
 - d. Highlight the new Report name and click Open Select Report.
 - e. For the Maintain Report Parameters pop-up window, set the parameters as follows
 - Filter By: Community
 - Filter Item: [select the community you are running the report for]
 - Start Date: [first day of the month you are running the report for]
 - End Date: [last day of the month you are running the report for]
 - Group By: Community Name

- 2) Click the  Export icon above the Preview tab.
- 3) For the export format and destination options, choose Separated Values (CVS) for the Format and Disk File as the Destination, then click **OK**



- 4) For the separated values export options
 - a. Check the box for 'Isolate Report/Page sections' under Report and Page sections
 - b. Select 'Do not export' under Group sections
 - c. Click **OK**



- 5) Choose a location to save the CSV file to, then click **Save**.