



**MAX**  
MRI Application eXchange

# **MAX Esusu Payment History File Export**

# MAX Esusu Payment History File



## ***Explanation:***

This is a custom report of rent payment history 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.***


```
"Lease ID", "Transaction ID", "Payment Date", "Payment Type", "Payment Amount", "Period"
"15445198", 40998, "2024-09-01", "Rent", 990.00,
"15845350", 41000, "2024-09-01", "Rent", 965.00,
"17645428", 41006, "2024-09-01", "Rent", 978.00,
"28145229", 41025, "2024-09-01", "Rent", 1110.00,
```

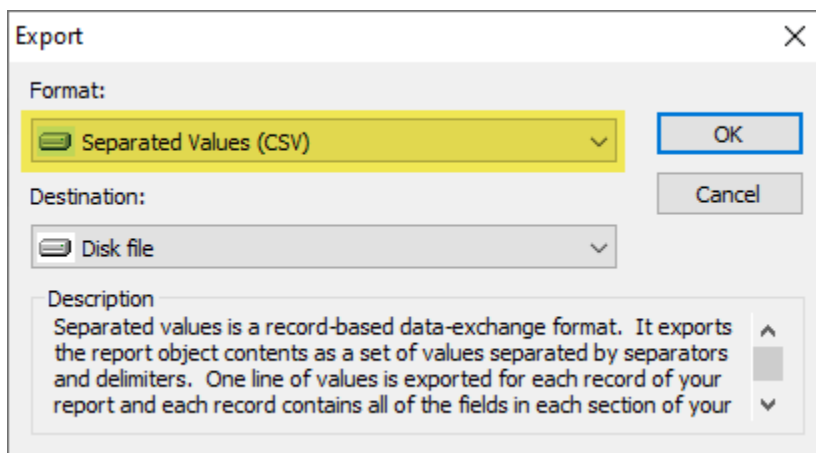
## ***How to add this Report your database:***

- 1) Download the [MAX\\_esusu\\_pmt\\_history.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\_pmt\_history.sql in my database to load Esusu Payment History 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\_pmt\_history.rpt
    - Description = MAX Esusu Payment History 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**

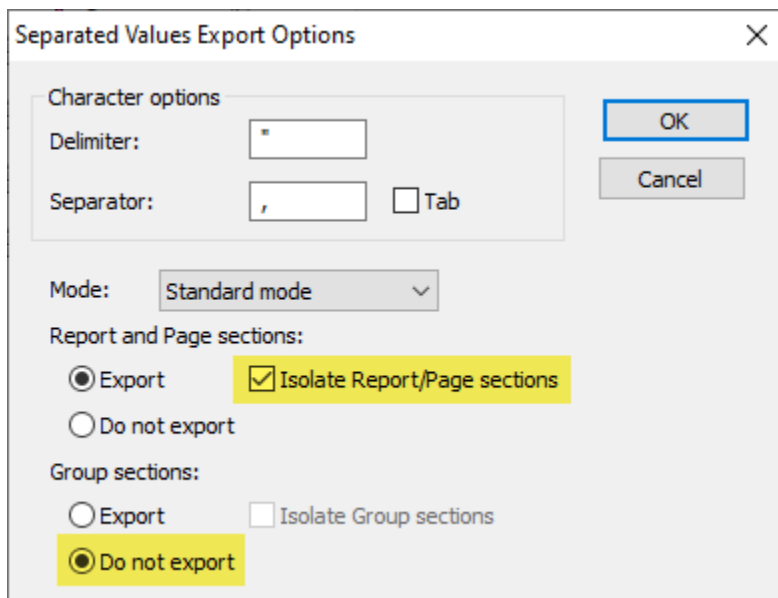


The 'Export' dialog box shows the following configuration:

- Format:** Separated Values (CSV) (highlighted)
- Destination:** Disk file
- Description:** Separated values is a record-based data-exchange format. It exports the report object contents as a set of values separated by separators and delimiters. One line of values is exported for each record of your report and each record contains all of the fields in each section of your

Buttons: OK, Cancel

- 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**



The 'Separated Values Export Options' dialog box shows the following configuration:

- Character options:**
  - Delimiter: [ ]
  - Separator: [ , ]  Tab
- Mode:** Standard mode
- Report and Page sections:**
  - Export  Isolate Report/Page sections (highlighted)
  - Do not export
- Group sections:**
  - Export  Isolate Group sections
  - Do not export (highlighted)

Buttons: OK, Cancel

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