

# Rentlytics File Layout

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<b>Description:</b>	This document provides the .CSV file layout used for the Rentlytics data transfer in eSite.

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# Rentlytics File Layouts

## Introduction

Export to Rentlytics is a feature that allows you to create a file to export to Rentlytics (eSite—Data Transfer—Export to Rentlytics).

This process creates comma separated value (.CSV) files in the Rentlytics format.

- All properties processed are included in a single .ZIP file that includes one .CSV file for each file type you choose to export.
- Exported file types are: Property List, Unit List, Unit Status, Lease Details, Lease Charges, Delinquency and Marketing. In addition, if there is a valid eFinancials database in the dataset, an option to export General Ledger is available.
- This is for Residential properties only. Commercial properties will be skipped.

## File Layouts

The following file layouts for Export to Rentlytics are available:

- Property List
- Unit List
- Unit Status
- Lease Details
- Lease Charges
- Delinquency
- Marketing
- General Ledger

## Lease and Unit Occupancy Statuses

For purposes of the export, below is a description of the applicable Lease and Unit Occupancy Statuses for residential properties only, as Commercial properties are not included in the export.

### Lease Statuses

- A** – Applicant. Resident is in the system but does not meet any other criteria.
- C** – Current. Resident is current.
- L** – Leased. Resident counts as leased based on the client’s policy.
- N** - On Notice. Resident is current but has given notice that they intend to move out.
- P** – Previous. Resident has moved out.
- T** - Transfer Out. Resident is current but has given notice that they intend to transfer to a different unit.
- V** – Approved. Application has been approved.
- X** – Cancelled. Applicant has cancelled or been denied.

## Unit Occupancy Statuses

**CA** - Construction Available. Unit is under construction and does not have an application.

**CL** - Construction Leased. Unit is under construction and has a lease.

**CP** - Construction Application Pending. Unit is under construction and has an application.

**NA** - On-Notice Available. Unit is occupied, is on notice and does not have an application.

**NL** - On-Notice Application Pending. Unit is occupied, is on notice and has a lease.

**NP** - On-Notice Leased. Unit is occupied, is on notice and has an application.

**OC** – Unit is Occupied.

**VA** - Vacant Available. Unit is under vacant and does not have an application.

**VP** - Vacant Pending. Unit is under vacant and has an application.

**VL** - Vacant Leased. Unit is under vacant and has a lease.

## Unit Status

**C** – Construction. Unit is under construction.

**D** – Down. Unit is down.

**E** – Employee. Unit is reserved for an employee.

**M** – Model. Unit is a model unit.

**N** – Normal. Unit is a standard unit.

**O** – Other. Other status, i.e., in general, unit is used for administrative purposes.

**W** - Wait List. Wait List status, i.e., unit is not a real unit.

## .CSV File Header

Each .CSV file created will include four (4) header lines containing the following information:

- Data Feed Name (Property List, Unit List, Unit Status, Lease Details, Lease Charges, Delinquency, Marketing, General Ledger)
- Version
- “As Of:” yyyy-mm-dd The date when the feed was generated
- Field Names

For example, this is a header format for the *Delinquency* .CSV file:

Delinquency			
Version: 2.2			
As Of: 2016-01-01			
property_id	unit_id	resident_id	continued...

## Property List File Layout

The Property .CSV file layout is used for the *Export to Rentlytics*.

- The default file name is Property\_List\_yyyymmdd.csv.
- All properties selected for export must have a full address defined under Property Setup. (Setup – Property – Properties: Address tab). The Property List option will be unavailable if any part of the full address (name, street address, city, state, and zip code) is missing for a selected property.
- Commercial properties are skipped.
- Dates are formatted as yyyy-mm-dd.

Name	Column Name	Data Type	Value Required
Property Code	property_code	Text	Yes
Property Name	name	Text	Yes
Street Address	street_address	Text	Yes
City	city	Text	Yes
State	state	Text	Yes
Postal Code	postal_code	Text	Yes
Date when Property went Live	launch_date	Date	No

### Example:

"001","Tampa Palms Resort","1234 Main St","Tampa","FL","33626",2003-08-01

## Unit List File Layout

The Unit .CSV file layout is used for the *Export to Rentlytics*.

- The default file name is Unit\_List\_yyyymmdd.csv.
- Wait List units are skipped.

Name	Column Name	Data Type	Value Required	Notes
Property Code	property_code	Text	Yes	
Unit Type Code	unit_type_code	Text	Yes	
Unit Type Name	unit_type_name	Text	Yes	
Unit Code	unit_code	Text	Yes	BuildingID-UnitID
Unit Name	unit_name	Text	Yes	
Number of Bedrooms	bedrooms	Numeric	Yes	
Number of Bathrooms	bathrooms	Numeric	Yes	Use decimal for units with half baths, i.e., 1.5.
Unit Square Feet	square_feet	Numeric	Yes	
Unit Type Classification	unit_type_classification	Text	No	Unit Status (Normal, Construction, Model, Employee, Down)

### Example:

"001","1X1","One Bed One Bath","01-100","01-100",1,1,750,"Normal"

## Unit Status File Layout

The Unit Status .CSV file layout is used for the *Export to Rentlytics* process.

- The default file name is Unit\_Status\_yyyymmdd.csv.
- Wait List units are skipped.
- Lease details are provided only for the current lease, or for the first new lease (for Vacant / Rented units)
- Residents with an expired lease but who are current are included
- Dates are formatted as yyyy-mm-dd.
- Status
  - Occupied: Occupied without a future renewal
  - Renewal: Occupied with a future renewal
  - Occupied NTV: On-Note Available, On-Notice Pending, On-Notice Leased
  - Vacant: Vacant Available, Vacant Pending, Vacant Leased, Construction Available, Construction Pending, Construction Leased
  - Model: Model
  - Admin/Down: Other, Down
- Future Rented Status
  - Rented: Notice Leased, Vacant Leased, Construction Leased
  - Unrented: *All other statuses*

Name	Column Name	Data Type	Value Req'd	When Required	Notes
Property Code	property_code	Text	Yes		
Unit Code	unit_code	Text	Yes		BuildingID-UnitID
Type of Status Record	status	See Notes for values.	Yes		Possible Values: <i>Occupied, Occupied NTV, Renewal, Vacant, Admin/Down, Model</i> Reflects the state of the unit independent of resident_status
Resident Code	resident_code	Text	Yes	Status=Occupied, Occupied NTV, or Renewal	Value not required for vacant unrented units Propertyid+BuildingID+UnitID+ResidentID
Resident Full Name	resident_name	Text	Yes	Status=Occupied, Occupied NTV, or Renewal	Value not required for vacant unrented units

Name	Column Name	Data Type	Value Req'd	When Required	Notes
Resident Email Address	resident_email	Text	Yes	Status=Occupied, Occupied NTV, or Renewal	Value not required for vacant unrented units
Resident Status	resident_status	See Notes for values.	Yes		Possible Values: <i>Future, Current</i> Set to <i>Current</i> for units without residents
Current Market Rent	market_rent	Numeric	Yes		
Current Market Deposit	market_deposit	Numeric	Yes		
Date Leased Signed	lease_sign	Date	Yes	Status=Occupied, Occupied NTV, or Renewal	Value not required for vacant unrented units
Lease Start Date	lease_from	Date	Yes	Status=Occupied, Occupied NTV, or Renewal	Value not required for vacant unrented units
Lease End Date	lease_to	Date	Yes	Status=Occupied, Occupied NTV, or Renewal	Value not required for vacant unrented units
Actual or Scheduled Move In	move_in	Date	Yes	Status=Occupied, Occupied NTV, or Renewal	Value not required for vacant unrented units
Actual or Scheduled Move Out	move_out	Date	Yes	Status=Occupied NTV	
Date Notice to Vacate Was Given	notice_given	Date	Yes	Status=Occupied NTV	
Date Unit is Ready for New Occupant	make_ready	Date	Yes	Status=Vacant	
Current Ready State	make_ready_status	Text	Yes	Status=Vacant	Possible Values: <i>Ready, Not Ready</i>
Days Unit Has Been Vacant	days_vacant	Numeric	No		Will only be populated for units with status = Vacant.
Future Rented Status	future_rented_status	See Notes for values.	No		Possible Values: <i>Rented, Unrented</i>



**Example:**

"001","01-100",Occupied NTV,"001011001","Jones,  
Chris","dummy@dummy.com",Current,1184.00,100.00,2012-10-01,2012-10-01,2013-03-31,2012-10-  
01,2014-06-01,2014-05-16,,Not Ready,,Rented

## Lease Details File Layout

The Lease Details .CSV file layout is used for the *Export to Rentlytics* process.

- Initial *Data Load* option affects the export process in these ways:
  - *When the Initial Data Load option is checked*, the file will include entries with a Lease Begins date within five years of the As Of Date. The generated data will be logged into a table, including leases not included in the file.
  - *When the Initial Data Load option is unchecked*, if there are no differences for a particular lease, then the lease will not be included in the file. The generated data will replace or be added to the log table. If a lease no longer exists, for example this could be due to a resident renumber, then the old lease will be written to the file with a move out date of the prior extract and the old lease will be removed from the logged data.
- The default file name is Lease\_Details\_yyyymmdd.csv.
- Only residents and leases with a lease signed, lease begin and lease end date are included; however, residents with an expired lease but who are current are included.
- In the case of multiple current residents, the first will be chosen. Charges will be based on the As Of date for current residents. The first future resident will also be reported on. For these residents, the charges will be based on the Lease Begins date.
- Multiple charges of the same Charge Type, will be summed together. For example, three charges for PARK, \$10 per month, \$25 per quarter, and \$50 per year, there will be one PARK entry for \$22.50.
- Historical lease data will be pulled from the system lease renewal tables.
- Clients need to change move out dates to use valid Rentlytics values (Regular, Break, Skip, Eviction). If an invalid value is used then Regular will be populated in the file.
- Dates are formatted as yyyy-mm-dd.
- Identifier:
  - Renewal Number: Historical lease information from the lease renewal screen.
  - Current: Lease information from lease changes for leases without lease renewals.
  - Future: Lease information from lease changes for leases without a moved in date.
  - Former: Lease information from lease changes for leases with a move-out date.
- Resident Status
  - Future Resident: Leased resident
  - Current Resident: Current resident
  - Former Resident: Previous resident
- Renewal Status
  - New Tenant: First lease of a resident.
  - Renewal: For any other leases.

Name	Column Name	Data Type	Value Req'd	Notes
Property Code	property_code	Text	Yes	
Lease Code	lease_code	Text	Yes	Unique identifying code for each lease Propertyid-BuildingID-UnitID-ResidentID-Identifier
Unit Number	unit_code	Text	Yes	BuildingID-UnitID
Resident Full Name	resident_name	Text	Yes	
Resident Code	resident_code	Text	Yes	Unique identifying code for each resident Propertyid-BuildingID-UnitID-ResidentID
Resident Cell Phone Number	resident_cell_phone	Text	No	Phone 2 from Occupant Demographics or if Null, then Phone 2 from Addresses-Contact Details
Resident Home Phone Number	resident_home_phone	Text	No	Phone 1 from Occupant Demographics or if Null, then Phone 1 from Addresses-Contact Details
Resident Email	resident_email	Text	No	Email from Occupant Demographics or if Null, then Email from Addresses-Contact Details
Resident Status	resident_status	See Notes for values.	Yes	Possible Values: <i>Future Resident, Current Resident, Former Resident</i>
Market Rent	market_rent	Numeric	Yes	
Lease Sign Date	lease_sign	Date	Yes	
Lease Start Date	lease_start	Date	Yes	
Lease End Date	lease_end	Date	Yes	
Move In Date	move_in	Date	No	
Move Out Date	move_out	Date	No	
Notice Given Date	notice_given	Date	No	
Move Out Notice Type	notice_type	See Notes for values.	No	Possible Values: <i>Regular, Break, Skip, Eviction</i>
Lease Rent	actual_rent	Numeric	Yes	
Number of Occupants	number_of_occupants	Numeric	Yes	
Renewal Status	renewal_status	See Notes for values.	Yes	Possible Values: <i>Renewal, New Tenant</i>

**Example:**

"001", "001-02-205-1-4746637", "02-205", "Hill, Chris", "001-02-205-1", "(888) 555-1212", "(888) 555-1212", "dummy@dummy.com", Current Resident, 1749, 2006-12-13, 2006-12-13, 2007-12-31, 2006-12-13,,,,, 1627, 1, New Tenant

## Lease Charges File Layout

The Lease Charges .CSV file layout is used for the *Export to Rentlytics* Process.

- The default file name is Lease\_Charges\_yyyyymmdd.csv.
- In the case of multiple current residents, the first is chosen.
- Charges are based on the As Of Date for current residents.
- The first future resident is also reported on; for these, resident charges are based on the Lease Begins date.

Name	Column Name	Data Type	Value Required	Notes
Property Code	property_code	Text	Yes	
Unit Code	unit_code	Text	Yes	BuildingID-UnitID
Resident Code	resident_code	Text	Yes	PropertyID-BuildingID-UnitID-ResidentID
Resident Status	resident_status	See Notes for values.	Yes	Possible values: Future, Current
Charge Type Name	charge_type	Text	Yes	
Charge Amount	charge_amount	Numeric	Yes	Amount converted to a monthly value

### Example:

"001","01-100","001-01-100-1",Current,"Rent",1184

## Delinquency File Layout

The Delinquency .CSV file layout is used for the *Export to Rentlytics* process.

- The default file name is Delinquency\_yyyymmdd.csv.

Delinquency is based on current open items (not historical open items) and thus ties with the Delinquency report. Note: future items are not included.

Name	Column Name	Data Type	Value Required	Notes
Property Code	property_code	Text	Yes	
Unit Code	unit_code	Text	Yes	BuildingID-UnitID
Resident Code	resident_code	Text	Yes	PropertyID-BuildingID-UnitID-ResidentID
Resident Full Name	resident_name	Text	Yes	
Resident Email Address	resident_email	Text	No	
Resident Status	resident_status	See Notes for values.	Yes	Possible Values: Future, Current, Past
30 Day Delinquency	thirty_day_delinquency	Numeric	Yes	Delinquent charges 0-30 days old
60 Day Delinquency	sixty_day_delinquency	Numeric	Yes	Delinquent charges 31-60 days old
90 Day Delinquency	ninety_day_delinquency	Numeric	Yes	Delinquent charges 61-90 days old
90+ Day Delinquency	ninety_plus_day_delinquency	Numeric	Yes	Delinquent charges over 90 days old
Total Delinquency	total_delinquent	Numeric	Yes	Total delinquent charges
Prepaid Charges	prepays	Numeric	Yes	Prepaid balance for this resident

### Example:

"001", "01-100", "001-01-100-1", "Jones, Chris", "dummy@dummy.com", Current, 1184, 1184, 1184, 3448, 7000,

## Marketing File Layout

The Marketing .CSV file layout is used for the *Export to Rentlytics* process.

- When the *Initial Data Load* option is checked, then the data pulled will be from the first of the prior calendar year, for example from 1/1/2016 to 4/25/2017.
- This file layout includes prospects with any contact, or the application date of the associated Lease is between the first of the prior month and the As Of Date, so for an As Of Date of 07/25/2016, this would be from 06/01/2016 to 07/25/2016.
- The default file name is Marketing\_yyyymmdd.csv.
- Dates are formatted as yyyy-mm-dd.
- Status of Prospect
  - Prospect: no associated lease
  - Applicant: Lease is Applicant or Approved
  - Resident: Lease is Current, Transfer Out, or On-Notice
  - Cancelled: Lease is Cancelled as a cancellation
  - Denied: Lease is Cancelled as a denial
  - Former Resident: Lease is Previous
  - Future Resident: Lease is Leased

Name	Column Name	Data Type	Value Req'd	When Required	Notes
Property Code	property_code	Text	Yes		
Unit Code	unit_code	Text	No		BuildingID-UnitID
Prospect Code	prospect_code	Text	Yes		Guest card number
Resident Code	resident_code	Text	Yes	Status= Resident and Move In Date is available.	PropertyID-BuildingID-UnitID-ResidentID
Prospect Full Name	name	Text	Yes		
Street Address	address	Text	No		
Prospect Email	email	Text	No		
Prospect Work Phone	work_phone	Text	No		
Prospect Home Phone	home_phone	Text	No		
Name of Primary Marketing Source	primary_source	Text	Yes		

Name	Column Name	Data Type	Value Req'd	When Required	Notes
Name of Primary Leasing Agent	primary_agent	Text	Yes		
When the First Contact Event Occurred	first_contacted	Date	Yes		
When the First Unit Was Shown	first_shown	Date	No		
Most Recent Unit Shown Date	most_recent_shown	Date	No		
Total Number of Unit Show Events	num_shows	Numeric	No		
Application Submitted	application_submitted	Date	No		
Application Approved	application_approved	Date	No		
Application Cancelled	application_cancelled	Date	No		
Application Denied	application_denied	Date	No		
Status of Prospect	status	See Notes for values.	Yes		Possible Values: <i>Prospect, Applicant, Resident, Cancelled, Denied, Former Resident, Future Resident</i>
Prospect's Desired Unit Type	unit_type_code_desired	Text	No		
Prospect's Desired Rent Payment	rent_desired	Numeric	Yes		
Prospect's Desired Bedrooms	bedrooms_desired	Numeric	No		
Prospect's Desired Bathrooms	bathrooms_desired	Numeric	No		
Prospect's Desired Move In Date	date_needed	Date	Yes		
Actual Move In Date	move_in_date	Date	Yes	Status= Resident	Required if a prospect has converted to a resident and moved in.

Name	Column Name	Data Type	Value Req'd	When Required	Notes
				And Move In Date is available	
Market Rent of Unit Rented	market_rent	Numeric	Yes	Status= Resident	Required of all prospects converted into residents.
Actual Rent of Unit Rented	actual_rent	Numeric	Yes	Status= Resident.	Required of all prospects converted into residents.
Date of First Lease For Prospect	lease_from	Date	Yes	Status= Resident.	This should be the lease from date for the very first lease this prospect had.
Date of Lease To For Prospect	lease_to	Date	Yes	Status= Resident.	This should be the lease to date for the very first lease this prospect had..

**Example:**

"001",,370,"001-02-209-5","Harris, Jack","124 Hightop Ridge, Tampa, Fl 33602","dummy@dummy.com","","",,2014-05-18,,,2014-05-18,2014-05-18,,,Applicant, B1-1,0,0,.00,2014-05-31,,1779,.00,,



## General Ledger File Layout

The General Ledger .CSV file layout is used for the *Export to Rentlytics* process.

- When the *Initial Data Load* option is checked, the entries will include the two prior years and the current year through the current period.
- The default file name is General Ledger\_yyyymmdd.csv.
- The General Ledger option is available only when there is a valid eFinancials database in the data set.
- All selected entities are included.
- All accounts and periods will be exported, even when the amounts are zero.
- Dates are formatted as yyyy-mm-dd.
- Amounts are not sign reversed, i.e., an income account with a 50,000 balance is reported as -50,000.
- File includes the current period, based on the entities' current period, plus the prior two periods, which allows Rentlytics to track changes.
- Period is the starting date of the period
  - Example: 12 period setup with periods running from the 26<sup>th</sup> to the 25<sup>th</sup>, with period 1 of fiscal year 2017 starting on 7/26/16, and a current period in the entity of 4/2017, would report for 10/26/2016, 9/26/16 and 8/26/16 (periods 3/2017, 2/2017, and 1/2017).
- Data is not based on the As Of Date.
- It is the user's responsibility to make sure that all entities included in an export use the same Chart of Accounts.

Name	Column Name	Data Type	Value Required
eFinancials Entity ID	property_code	Text	Yes
Account Code	account_code	Text	Yes
Account Name	name	Text	Yes
Reporting Period	period	Date	Yes
Actual Value	actual	Numeric	Yes
Budget Value	budget	Numeric	Yes

### Example:

"001","4555","Fire Protection Supplies/Services",2015-03-01,60,45

"001","4555","Fire Protection Supplies/Services",2015-02-01,25,40

"001","4555","Fire Protection Supplies/Services",2015-01-01,100,40