



# Yardi® Integration How-To-Guide

CSC ServiceWorks is here to help Property Managers with resident onboarding and communications. The simplest and easiest way to take advantage of everything CSC has to offer is by integrating our service into your Yardi Property Management System.

Not only is the set up simple & secure – but it can also help you increase revenue & resident satisfaction with your community laundry amenities.

Once you enable integration – CSC gets to work on your behalf. We share helpful onboarding & ongoing information directly with your residents. They'll receive emails letting them know about our \$5 FREE Laundry offer for downloading the app and registering their account, as well as our online welcome sessions to introduce them to the features & benefits of the technology.

## Here's How to Integrate:

### Step 1 – Configuring the Vendor Options

**Menu Path:** *Basic iData Menu > Interfaces > Configuration > Review Interface Vendors*

#### *ILS Guest Card*

- Confirm that CSC ServiceWorks appears in Voyager under the appropriate Interface configuration. *If CSC is not present, contact Yardi Technical Support to load the vendor package.*
- Select CSC ServiceWorks on the vendor configuration screen.
  - a. *Include only Residents/Guests with activity in the last 30 days*
  - b. *Schema version v4.0*
  - c. *Export all guest cards, ignore interface association*
- Save the configuration options.

#### *Interfaces > Configuration > Review Interface Vendors > Common Data*

- Select CSC ServiceWorks on the vendor configuration screen.
- Set the following Common Data permissions to Read:
  - a. *First Name, Last Name, Email\* (if permission is available-otherwise Email defaults to Read) and Scheduled Lease Renewals.*
- Save the configuration options.

## Step 2 – Configure the Property or Property List

**Menu Path for a Single Property:** *Setup > Property > Review Property > [code] > Submit.*

- Click on Functions drop down menu. Click on Interface Configuration.
- Select ILS/Guest Card under Interface Configuration.
- Highlight CSC ServiceWorks under Available Agencies.
- Click Select and Save.

**Menu Path for a Property List:** *Interfaces > Configuration > Bulk Property Configuration.*

- Enter property list code
- Select Interface Type from drop down (CSC ServiceWorks will be listed under ILS Guest Card).
- Select Configure.
- Highlight CSC ServiceWorks from list of Available Agencies and click Save.

## Step 3 – Configure the Interface User

**Menu Path:** *System Administration > Security > Add User*

- Create a new interface user and link to a security group for the specific Interface Type.
  - a. If a security group does not exist for ILS Guest Card interfaces, then follow your Voyager setup guide for creating a security group (Security > Add Group).
- The security group should have Read or Read/Write access for appropriate web services permission(s):
  - a. Interfaces: Web Service - ILS/Guest Card
  - b. Interfaces: Web Service - Resident Data
  - c. Interfaces: Web Service - Common Data
- On the User screen, click on Privileges tab and select "Interface User". This will give user access through the web services, but not the Voyager front end.
- Click save.

## Step 4 – Provide Access Information to CSC ServiceWorks

- Voyager URL (vendor will append the appropriate web services endpoint)
- Interface username and password
- Database Name (found in Administration > About)
- Server Name (will always be the same as Database Name)
  - *Note: Clients should always notify the third-party vendor of any changes to Voyager URL, database server or database name.*

*\*Mutual Clients should enter a case in Client Central to their Yardi Account Manager or team if assistance is needed with any Step in this document.*

*\*\*For more information, please see the ILS Guest Card Interface Setup Guide, and Common Data Interface Setup Guide, available on Client Central.*