AppFolio Owner Statement Overview

Owner Statement Overview

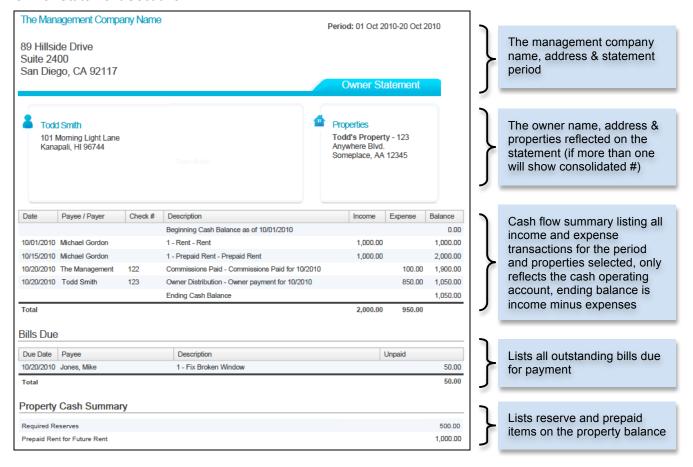
The Owner Statement is the document that summarizes the status of the operating cash account for the owner's properties for a selected time period.

IMPORTANT: The owner's statement is not a formal financial report, but rather a simple summary to give the owner an overview of their properties cash related transactions. If you have suppressed fees on your account they will not show on the Owner Statement, if suppressing fees please see the Additional Fees reference guide to understand its impacts.

The Owner Statement is typically the lead item in the owner packet that is sent out each month, it may also be generated as an individual document at any time desired.

The Owner Statement may be generated for a desired date range back to the start of use with AppFolio. The statement may also be for an individual property or for a selected set of properties.

Owner Statement Sections:



How to Run an Owner Statement

- 1. Login with a user account that has permissions to perform this function
- 2. Find the owner you wish to view by:
 - Using the AppFolio Search: Near the top right of the AppFolio screen, in the Search box, enter the name
 of the desired owner, when presented with search results, click the name of the owner
- 3. The owner page will load in the right-side Task pane in the Letters section, click the link for Owner Statement
- 4. The Owner Statement will load in a new tab/window
- 5. To change statement settings like properties and date range, at the top-right of the statement click the Customize tab
- On the Report Options page, make your selections and click Run Report, the report will regenerate displaying according to your selections