REAL PROPERTY MANAGEMENT®
REMOTE SUPPORT OFFICE

Delinquencies Reporting Guide

RSO - Delinquencies Reporting Guide

This guide will cover the steps and requirements to review Delinquencies in AppFolio.

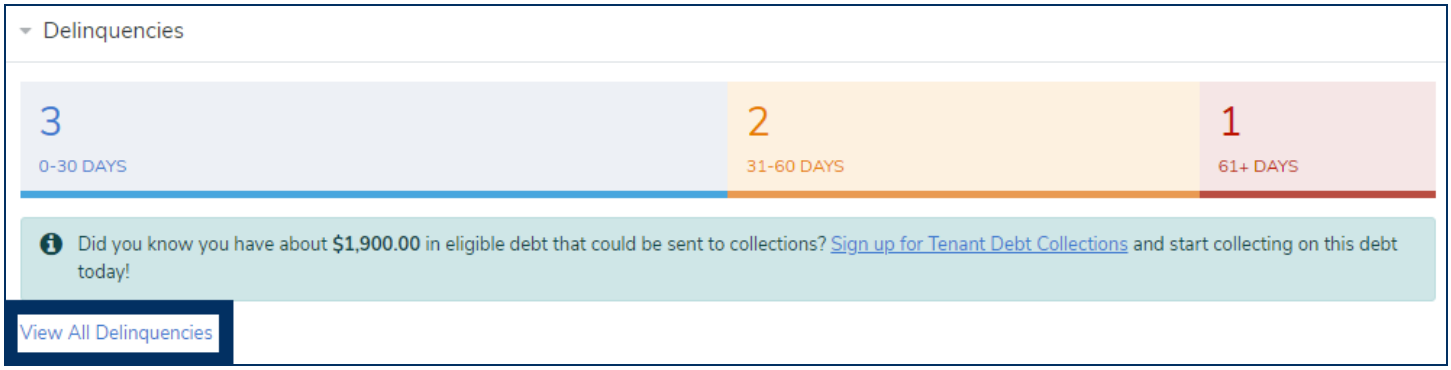
Purpose of Delinquency Review

The purpose of reviewing delinquencies is to keep on top of tenants who may be late paying their rent or other charges. By staying on top of this, you are better able to provide reminders to your tenants to pay their rent and other charges, and keep an eye on units where further action may need to be taken to address arrears. By encouraging prompt payment from tenants, you will help ensure your owners get paid on time each month.

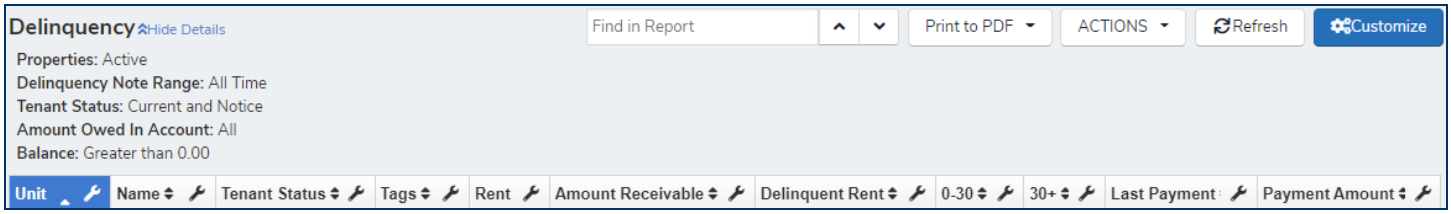
How to Review Delinquencies

Delinquencies should be reviewed daily from the start of the month until the receipt cutoff date, and weekly thereafter.

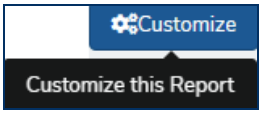
From your **Dashboard**, scroll down to find the **Delinquencies section**. This section provides you a quick look at the number of tenants who are in arrears and how long they have been delinquent.



At the bottom of this section, click on **View All Delinquencies** to load a **Delinquency Report** with further information.



You can customize the **Delinquency Report** to suit your preferences.



To customize the report, click on **Customize** in the top right corner of the Delinquency Report.

RSO's recommended report settings:

On the **Filters** screen:

- **Properties** should be left **blank** and set to **Show Active Properties**
- **Delinquency Note Range** should be **All Time**
- **Tenant Status** select **Current** and **Notice**
- **Tags** leave **blank**
- **Amount Owed In Account** should be **All**
    - This will show you the full amount owing on the tenant's ledger
- **Balance** should be **Greater than 0**

On the **Columns** screen, check the following options:

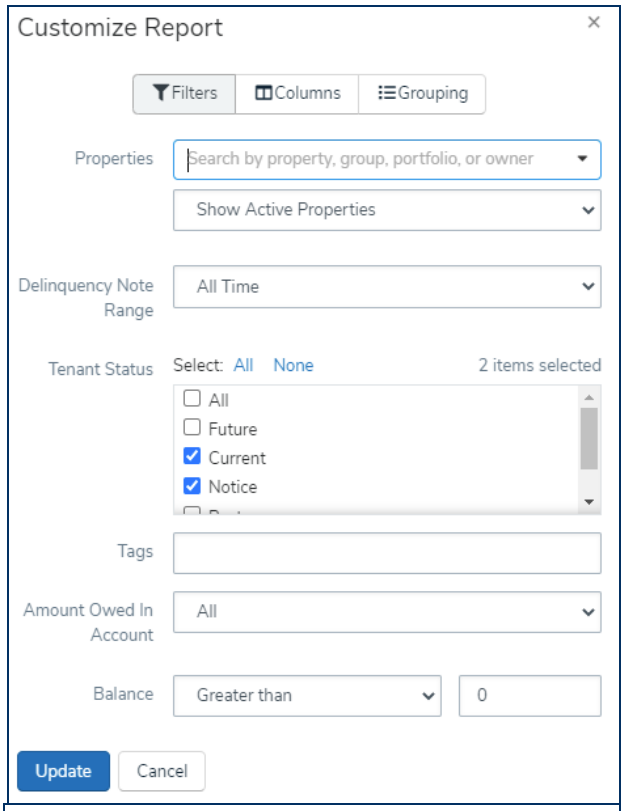
- **Unit**
- **Tenant Status**
- **Tags** (optional)
    - If your office uses Tags
- **Rent**
- **Amount Receivable**
    - This will be the full amount owing on the tenant's ledger
- **Delinquent Rent**
    - This will show you only the rent amount owing on the tenant's ledger
- **0-30**
- **30+**
- **Last Payment**
- **Payment Amount**

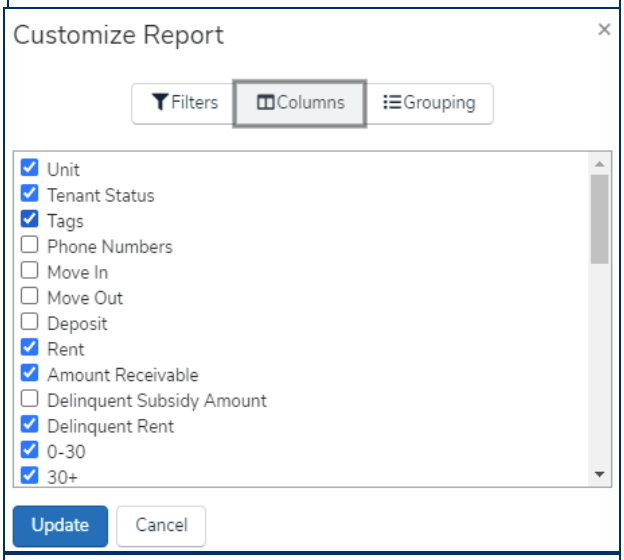
On the **Grouping** screen:

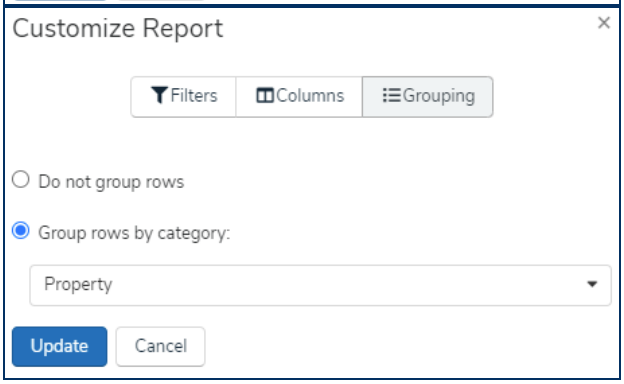
- **Group rows by category** set to **Property**

Click **Update** to generate the report.

There are many other settings that can be used to provide additional information, feel free to test them out to see what works best for your office.

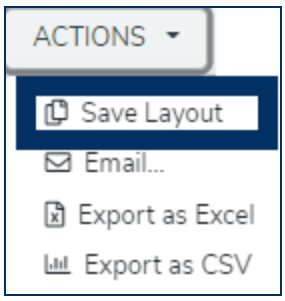


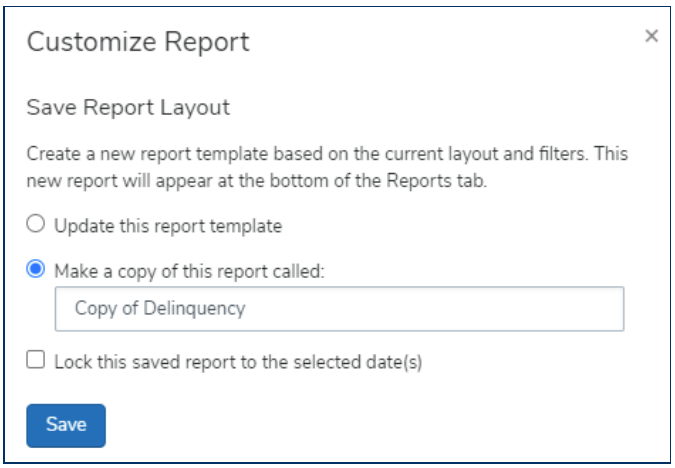




Save Customized Report:

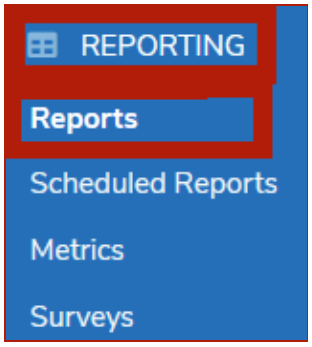
You can save your customized report by clicking on **ACTIONS** and choosing **Save Layout**. Choose to **Make a copy of this report called:** and give it a name; then click **Save**.

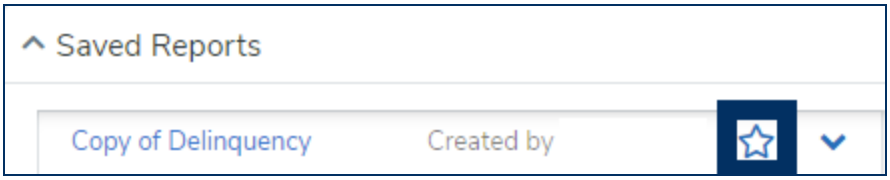




Locate your Saved Report:

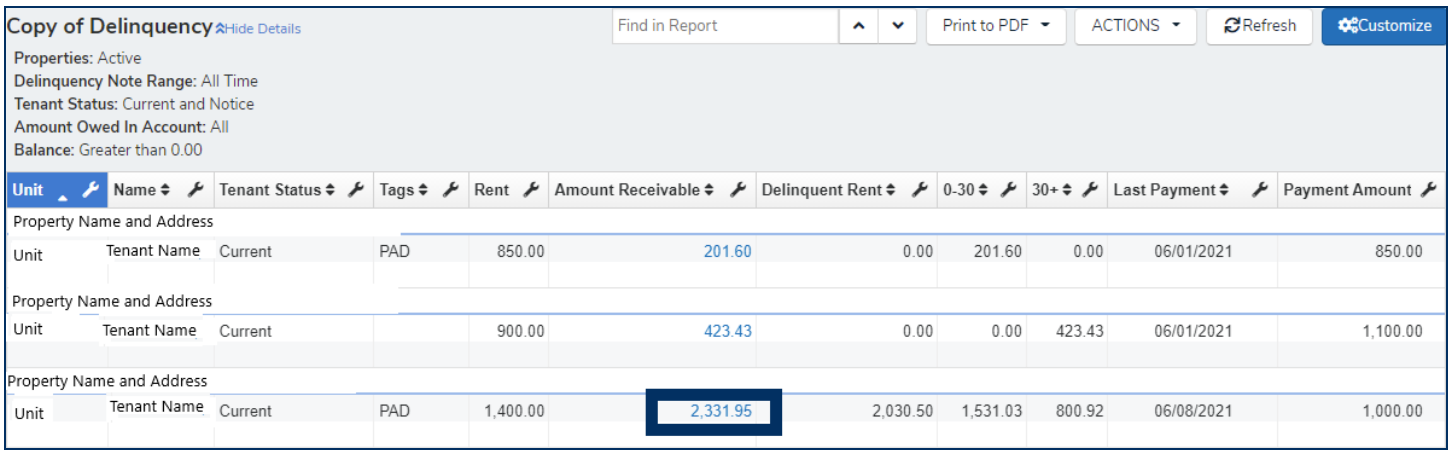
To find your report, on the left choose **Reporting**, then click **Reports**, and scroll to the bottom section called **Saved Reports** to locate your report. Click the **Star** next to it to add it to your **Favorite Reports** section at the top of the page for easier access.







Once you have the report customized, you can click on an **Amount Receivable** to view that tenant's ledger.



Tenant Unpaid Charges Summary Report

To view delinquent accounts in another way, you can use the **Tenant Unpaid Charges Summary Report** in AppFolio. This report will break down the amount owing, by GL Account, for all tenants in arrears.

To access this report, on the left choose **Reporting**, then click **Reports**, and scroll to the **Tenant Reports** section. Find the **Tenant Unpaid Charges Summary** report and click on it. AppFolio will automatically pull this report as of the current date, but you can click **Customize** and adjust the date as necessary.



In this report, click on the **Tenant's Name** and you will be redirected to the tenant's profile to access their ledger.

