

ashboard			
Insights	•	B	U
delds	\$349.95	\$397.51 APPROVED	\$37.50
Vorkflows	IN REVIEW		APPROVED
Calendar	N REALW	APPROVED	APAKDASD
Projects	@ Unit 26A	Ø 1247 Forest Rd UNIT Redwood Unit 3	© 1247 Forest Rd UNIT Redwood Unit 3
Properties	# T14VUQ(B: Leaky Bach Fauces	# TGWL5YK A/C not working	#TGUW28N Toilet is clogged
Finances			
involces	PLACE IN REVIEW 🗸	MARK BILLED 🗸	MARK BILLED 🗸
Expenditures	PLACE IN REVIEW		
vendors	PLACE ON HOLD		
Residents	APPROVE		0
Dwners	MARKBILLED		
Hide navigation		\$89.00	\$1,248.45
	APPROVED	APPROVED	IN REVIEW
	9 1247 Forest Rd UNIT Redwood Unit 3	\$ 1247 Forest Rd UNIT Redwood Unit 3	Ø 1247 Forest Rd UNIT Redwood Unit 3
	#THI9UX Window doesn't shut	# T0NZCAA8 Water softener not working	#TCJKWZ4 Outlet does not work fried my macbook
	MARK BILLED	MARK BILLED	APPROVE

5. MC or PM reviews the closed Meld and verifies the expenditure is ready for billing. ≫ Insights ⓑ Melds ♣ Workflow ⓑ Calendar 圓 Projects m MARK BILLED 🗸 LED 🗸 \$1,248.45 MARK BILLED 🗸 APPROVE

PROPERTYMELD

6. The expenditure must be in approved status in order to sync over.

Last Steps Inside AppFolio

7. Approved expenditures appear as billable line items on Work Order and the expenditure PDFs are are attached to the Work Order. You will also see the receipts attached as files to the Work Order, if the tech adds them.

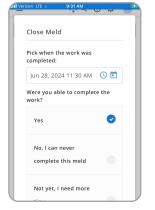
8. Meld Work Logs appear under "Labor" in the Work Order.



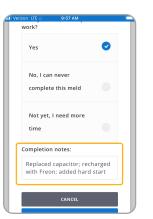
AppFolio Guide

Never miss an invoice again, stop chasing vendors, and set up your AppFolio integration for success with Property Meld.

Finishing Melds > Vendors



1. Meld is **closed** by linked Vendor.



2. Vendor adds completion notes.

al Verizon LTE	© 9:32 AM	Ľ
Crea	te Invoice	
	r line items and create your ce directly in PropertyMeld.	
	CREATE INVOICE	
Uplo	ad Invoice	
	ad a file containing your ce and enter a total.	
	UPLOAD INVOICE	
Impo	ort from QuickBooks	
	rt an invoice from your	
Quic	kBooks account to submit.	
	IMPORT FROM QUICKBOOKS	

^

3. Invoice is attached, created, or uploaded from Quickbooks.

		Q, (2) 🛱 Property Meld					
Create Meld	Submitted \sim						
Dashboard	FILTER 1 - SORT BY REQUESTED: RECENT -						
🖰 Melds		B					
B Workflows							
🗎 Calendar	\$292.60 Hank Handyman	\$100.00 Hank Handyman	\$1,248.45 Juan's Repairs				
II Projects	IN REVIEW	SUBMITTED	SUBNITTED				
Properties			SOMATED				
E Finances	1247 Forest Rd UNIT 1 1	1247 Forest Rd UNIT Redwood Unit 3	Unit 25A UNIT				
Involces	# TKTSILM AC unit not working 28 JUNE	#TCP2GEGB Gas fireplace not working. 23 JUNE	# T4YCK4U Plano fell through floor 22 JUNE				
Expenditures	SPAT Y	PLACE IN REVIEW	PLACE IN REVIEW				
%, Vendors	S PAY 🗸	PLACE IN REVIEW	PLACE IN REVIEW				
5. Residents							
a Owners							
Ex Hide navigation							
Support							

4. MC or PM reviews the closed Meld and **verifies the invoice** is ready for billing.

Dashboard	FILTER 1 - SORT BY REQUESTED: RECENT -		
≫ Insights			
🗅 Melds	8	1	8
Workflows			
🗂 Calendar	\$125.00 Hank Handyman	\$100.00 Hank Handyman	\$1,248.45 Juan's Repairs
E Projects	APPROVED	SUBMITTED	SUBNITTED
f Properties			
Finances	P 1247 Forest Rd UNIT Redwood Unit 3	@ 1247 Forest Rd UNIT Redwood Unit 3	© Unit 26A UNIT
Invoices	# TVLD41J Front door doesn't lock 27 JUNE	#TCP2GEGB Gas fireplace not working. 23 JUME	# T4YCK4U Plano fell through floor 22 JUNE
Expenditures			
Vendors	S PAY 🗸	PLACE IN REVIEW	PLACE IN REVIEW 🗸 🗸
a. Residents			
Be Owners			
■ Hide navigation			

5. MC or PM approves invoice.

Last Steps Inside AppFolio

- 6. Approved invoices appear as bills or billable line items on Work Order.
- 7. Approved invoice PDFs are attached to Work Order.



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AppFolio Guide



Never miss an invoice again, stop chasing vendors, and set up your AppFolio integration for success with Property Meld.

Pro Tips > Additional steps to ensure accurate billing

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Properties	Meld Integration	abailancterer kin
Finances Vendors	Partner AppFolio	Watchlist
Residents	View Work Order in AppFolio 🛛	Ec
Owners		proxy thighest
Hide navigation		Related Melds
		D related Melds found

Click to go right to the AppFolio Work Order from inside the Meld.

Meld

80 Owne ≡ Hide

Have the MC change the AppFolio Work Order	
to <i>Ready to Bill</i> status for accounting ease.	

ervice Request #210 🖍

÷ 100	PRETTINELD Help Cente	*			club meld	
Help Cen	ter > Integrations > AppF	80		Q	Q Search	
Articles	s in this section	How to Set GL (G	eneral Ledger)	Rules - AppFol	io	
	o Set GL (General r) Rules - AppFolo	23 days ago - Updated				
Vando	o Link/Unlink rs on Integrated ints - Appfolio Meld	Unlocking the potential of seamless i Managers with unparalleled control o General Ledger (GL) rules, tailored to	ver their financial operations. Int your specific criteria. These rule	roducing the ability to craft multi is serve as the blueprint for how	pie	
Deacti Units/F	ivating Properties - AppFolio	involces synchronize with AppFolio, or conditions that align with your busine AppFolio, ensuring streamlined and e	ss needs, you gain precision in			
Integra AppFo	ation Settings - slip	How to Set Your GL Rule:	3			
Integra AppFo	ation Screen Details - blio	Step 1: Click Company Name, and then click	Integration Settings.			
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Integra	ation Overview -	A management procession procession A management A management		Answer Aprice Index one Property American Company Index Complete American Complete Index Comp		

Create custom GL rules in Property Meld to improve billing accuracy in AppFolio - See how.

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Create Meld	Overview			
Dashboard	Shared Filters			
Insights	🔶 High Priority: 4	All (Last 30 Days): 55	High Priority: 10	
Melds	Watchlist: 9 Waiting on Tenant: 2	Unassigned: 20 Scheduled: 12	Walting on Vendor: 3 Invoice - Missing: 18	
Workflows	Watchlist - Roger: 36 Older than 30 Days: 12	Overdue: 11	Involces - Submitted: 2 Involces - Hold: 0	
Calendar	Lowest Rated (Last 30 Days): 0 Waiting on Estimates: 0	Closed (Last 30 Days): 22 Owner Responsibility: 4	Expenditure - Missing: 26 Expenditures - In Review: 2	
Projects	Top Rated (Last 30 Days): 0 Home Warranty: 5	Urgent: 9 Maria's Meldy: 12	Expenditures - Hold: 1 Expenditures - Drafts: 1	
Properties	Hutte Hartony. a	mana 5 metus. 14	Editional B. Prairs, 1	
Finances	Private Filters			
Vendors	Assigned to Me: 2	My Closed Melds (Last 30 Days): 0	88 Watchilst: 36	
Residents				
Owners	Metrics			
Hide navigation	Melds Completed g Spe	ed of Repair 👩 Median Speed of Repair 🍙	Tenant Satisfaction	All Time Tenant
	23 Melds from 1 Meld 3.6	days from 0.1 days 0.9 days from 0.1 days		Satisfaction
	+ 22 Melds 🛷	5 Days 🛷	00 -	- / 5.0
	Average Chat	Average Melds Older		
	Messages per Meld 1.09 Messages from 0 Messages	Than 14 Days 2.3 % from 0.0 %		

Create filters and automations (Workflows) to follow-up with vendors and surface missing invoices or expenditures.

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avigation

Customize the GL mapping to the correct account within Property Meld.