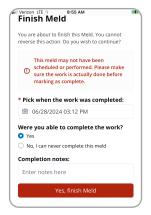
# AppFolio Guide

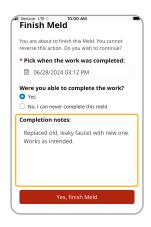


Never miss an invoice again, stop chasing vendors, and set up your AppFolio integration for success with Property Meld.

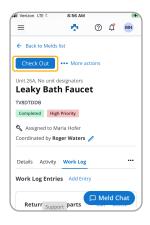
### Finishing Melds > Internal Technicians



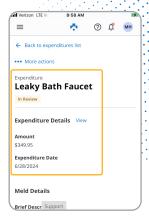
1. Meld is **closed** by linked Tech.



2. Tech adds completion notes.



**3.** Tech checks out of Meld.



**4.** Tech or MC **creates expenditure.** 



**5.** MC or PM reviews the closed Meld and **verifies the expenditure** is ready for billing.



**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.

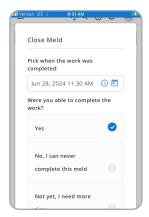


## AppFolio Guide

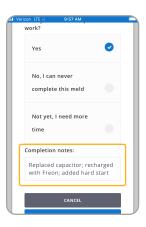


Never miss an invoice again, stop chasing vendors, and set up your AppFolio integration for success with Property Meld.

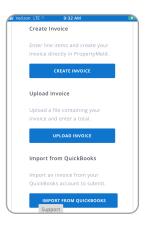
### Finishing Melds > Vendors



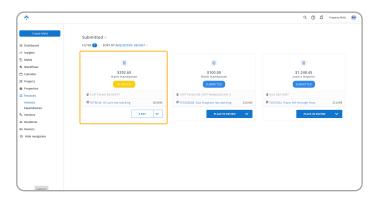
**1.** Meld is **closed** by linked Vendor.



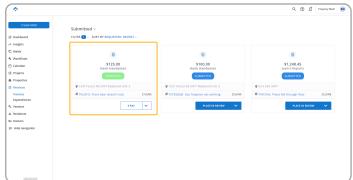
2. Vendor adds completion notes.



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



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



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.

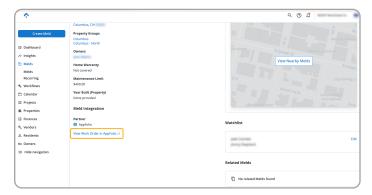


# AppFolio Guide

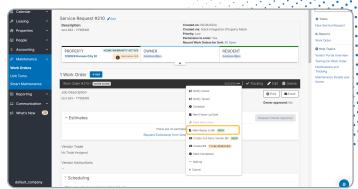


Never miss an invoice again, stop chasing vendors, and set up your AppFolio integration for success with Property Meld.

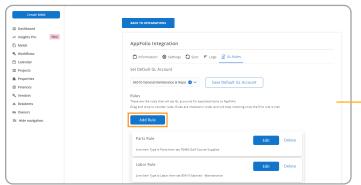
### Pro Tips > Additional steps to ensure accurate billing



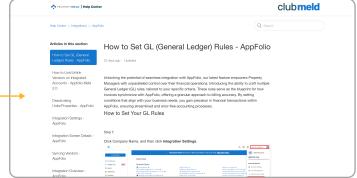
Click to go right to the AppFolio Work Order from inside the Meld.



Have the MC change the AppFolio Work Order to *Ready to Bill* status for accounting ease.



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



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



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