

Financial reporting and owner statements

Automatically generates comprehensive financial reports and owner statements by consolidating rental income, expenses, and maintenance costs from property management systems. Delivers personalized financial statements to property owners on schedule.

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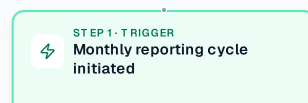


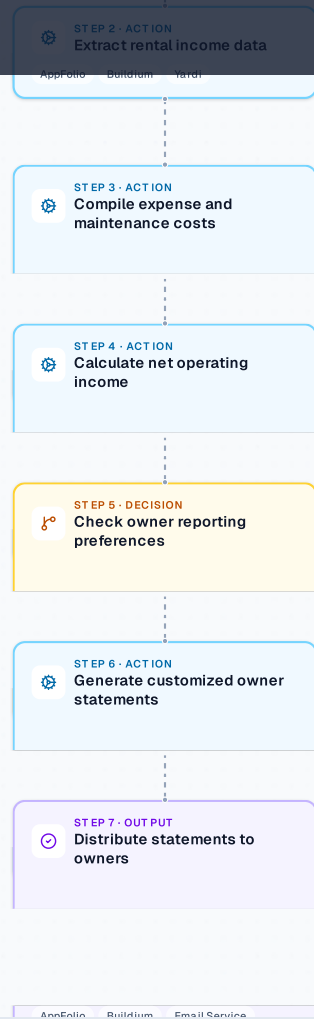
WORKFLOW TRIGGER

Monthly reporting cycle begins (typically last day of month)

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Monthly reporting cycle initiated

Workflow automatically triggers on the last day of each month to begin financial report generation. Sets date parameters for the reporting period.

2

 ACTION

Extract rental income data

Pulls all rent payments, late fees, and other income streams for each property from the property management system. Organizes data by property and owner.

AppFolio

Buildium

Yardi

3

 ACTION

Compile expense and maintenance costs

Retrieves all property-related expenses including maintenance requests, vendor payments, utilities, and management fees. Categorizes expenses by type and property.

AppFolio

Buildium

Yardi

4

 ACTION

Calculate net operating income

Performs financial calculations to determine gross income, total expenses, and net operating income for each property. Generates profit/loss summaries.

AppFolio

Excel

5

 DECISION

Check owner reporting preferences

Determines delivery method and report format based on each owner's preferences (email, portal, printed). Routes to appropriate output generation.

AppFolio

Buildium

6

 ACTION

Generate customized owner statements

Creates personalized financial statements for each property owner with their specific properties, formatted according to their preferences. Includes charts and transaction details.

AppFolio

Buildium

PDF Generator

7

 OUTPUT

Distribute statements to owners

Automatically sends completed financial statements to property owners via their preferred delivery method. Archives reports in owner portals for future reference.

AppFolio

Buildium

Email Service



Outputs

- Monthly owner financial statements

AI Business OS



Key Metrics

- Report generation time
- Owner satisfaction scores
- Statement delivery success rate



Tools & Integrations

- AppFolio
- Buildium
- Yardi
- Excel
- PDF Generator
- Email Service

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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