Rent Reporting
Appfolio Configuration

Version: 1.10
Date: December 1, 2025

Version

	1.0	Draft
June 28, 2023	1.1	Revised order of columns and filter selection
July 31, 2023	1.2	Updated Delinquency filters
Aug 10, 2023	1.3	Added Prerequisite
Mar 21, 2024	1.4	Added Actual Payment Amount Added note above setting up Schedules
Mar 28, 2024	1.5	Updated scheduled report screenshots
July 9, 2024	1.6	Added standard schema & Upload portal details
July 31, 2024	1.7	Improved order of instructions
Aug 22, 2024	1.8	Updated directory section details
Jan 9, 2025	1.9	Update email recipient on scheduler
Dec 1, 2025	1.10	• Updated from **Tenant Address 1** to **Tenant Street Address 1** • Updated Recipient address

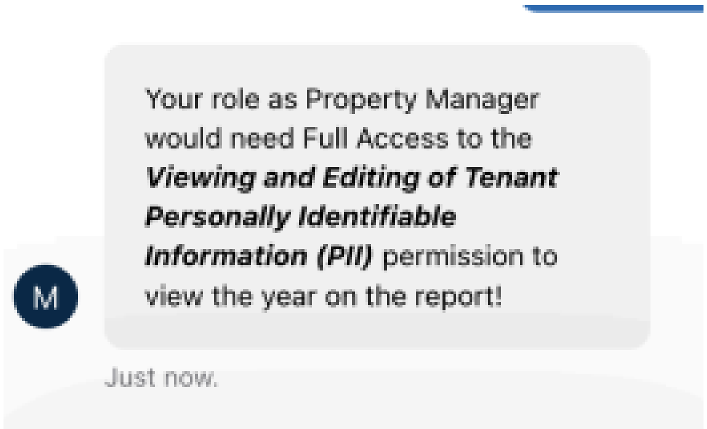
Contents

Overview

The purpose of this document is to provide Appfolio users guidance on creating reports for the purpose of Esusu Rent Reporting/Rent Relief.

Prerequisite

Please ensure the user profile that is used for building the reports has access to PII data. As per Appfolio, the user must have access to PII data.



Esusu - Appfolio Rent Reporting Configuration

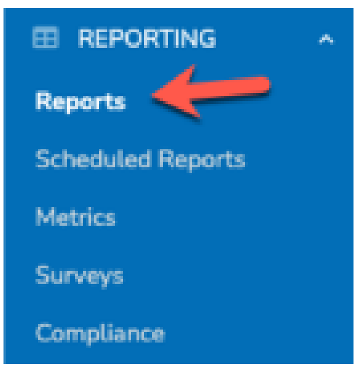
Build a New Report

Follow the three phases of building a new report: select a base report, combine data from multiple reports, and save reports.

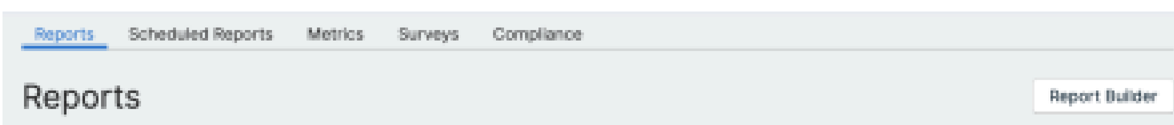
Select a Base Report

Start by selecting a base report (the report that has most of the information wanted) and then add columns from other reports to the base report.

1. Click on **Reporting > Reports**.



2. Click on **Report Builder** on the top right.



3. Select *Tenant Directory* in the dropdown for **Select Base Report**

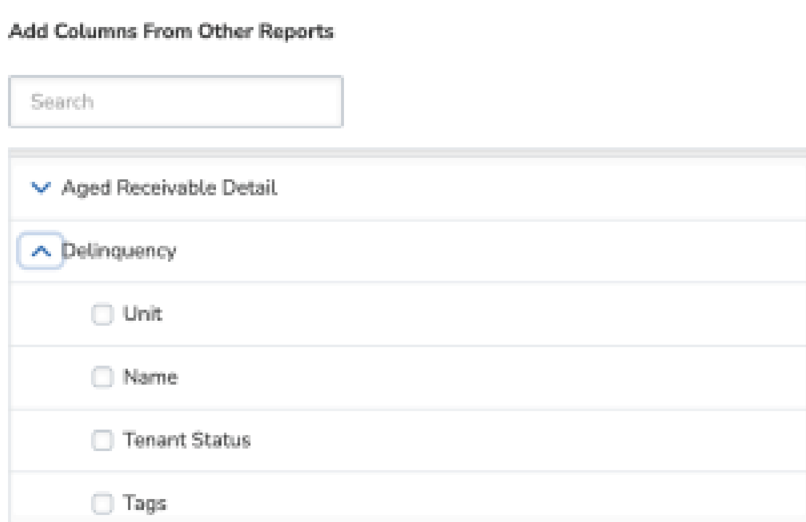

Report Builder
Select Base Report
Report
Tenant Directory
Continue

4. Deselect “All Columns”
5. Select only the following data points to include in this report from the **Tenant Directory section:**
    - Lease From
    - Lease To
    - Rent
    - Tenant Street Address 1
    - Unit
    - Tenant City
    - Tenant State
    - Tenant Zip Code
    - Last Name
    - First Name
    - Tenant Birthdate
    - Property ID*
    - Property Name*
    - Tenant ID*
    - Emails
    - Phone Numbers

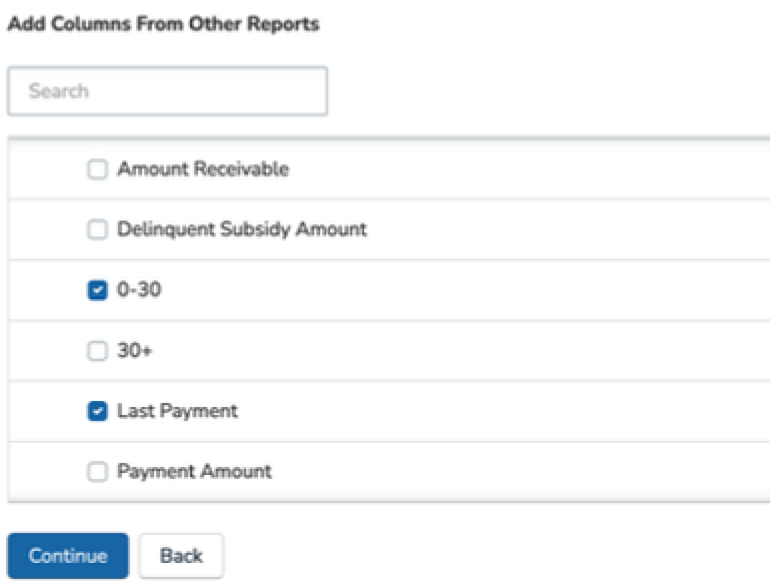
Combine Data from Multiple Reports

Columns can be added to the base report from multiple other reports.

1. Click on the down arrow beside **Delinquency**.



2. Select the follow columns to include in this report from the **Delinquency** section:
   - ○ 0-30
   - ○ Last Payment
   - ○ Payment Amount
3. Click **Continue**



Note: Tick/Untick the checkbox to select/deselect the column. Use the search and scroll down within the base report section to find all columns available for this report

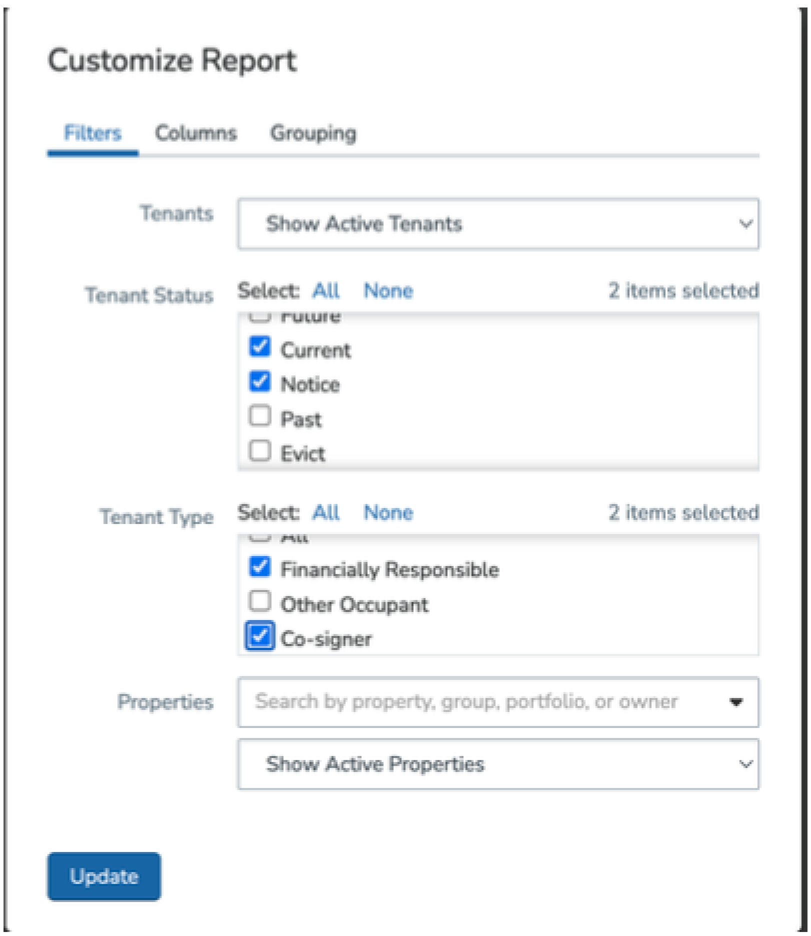
Setting Up Filters

1. Select the following filters:

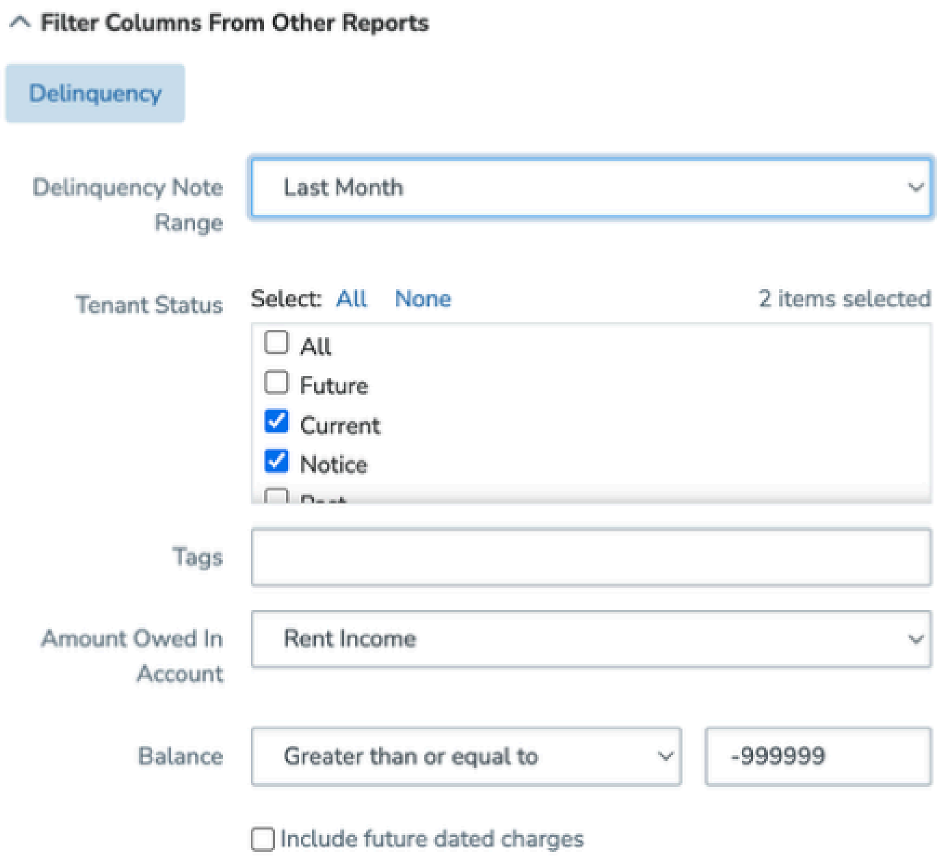
    Tenant Status: **Current, Notice**

    Tenant Type: **Financially Responsible, Co-Signer**

    Properties: **Show Active Properties** or enter the specific properties



2. Update the **Filter Columns from Other Reports > Delinquency** to the following:
    - Delinquency Note Range: **Last Month**
    - Tenant Status: **Current, Notice**
    - Amount Owed In Account: **Rent Income**
    - Balance: **Greater than or equal to -999999**



3. Click **Update**

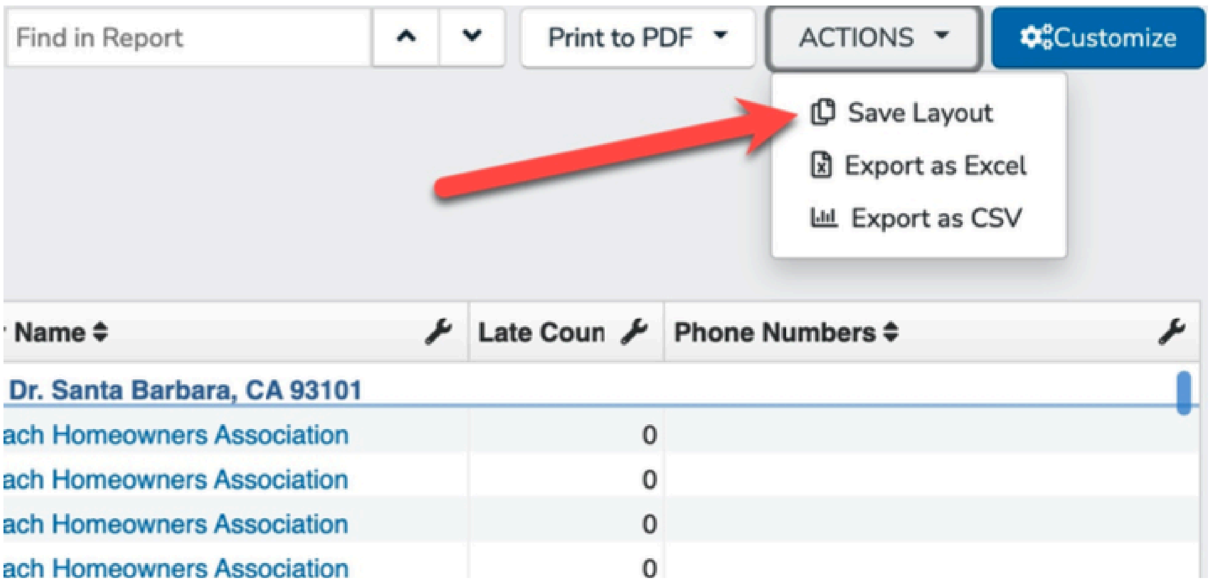
4. Arrange data points in the following order:

- Column A: Lease From
- Column B: Lease To
- Column C: Rent
- Column D: Last Payment
- Column E: Payment Amount
- Column F: 0-30
- Column G: Tenant Street Address 1
- Column H: Unit
- Column I: Tenant City
- Column J: Tenant State
- Column K: Tenant Zip Code
- Column L: Last Name
- Column M: First Name
- Column N: Tenant Birthdate
- Column O: Property ID*
- Column P: Property Name*
- Column Q: Tenant ID*
- Column R: Emails
- Column S: Phone Numbers

Save a Custom Report

Once the new report is created, **please ensure the column headers are in the same order as listed above**. From there, the layout can be saved so that it can be easily accessed at a later time without having to rebuild the report.

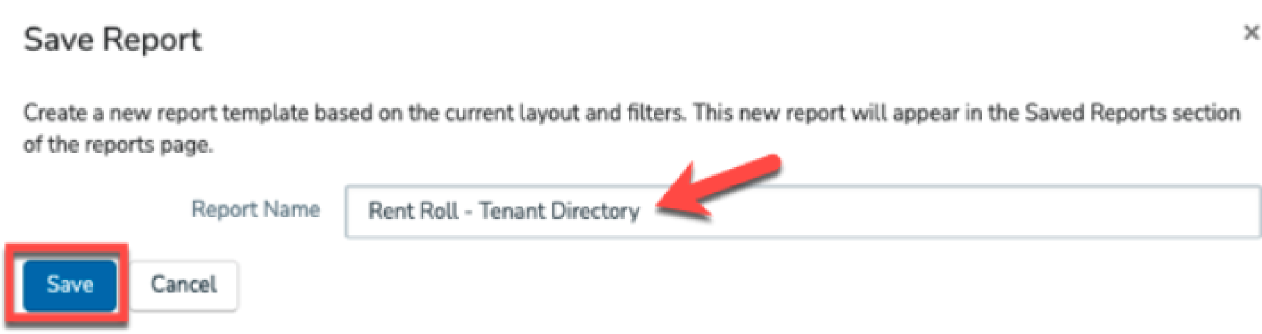
1. At the top right of the report click Actions and select Save Layout.



2. Enter in the Report Name and click Save. **Please use the following format for naming the report:**

   *Company Name*_Esusu_Monthly_*YYYYMMDD*.csv

   Example: AcmeCo_Esusu_Monthly_20230601.csv



Note: Your report will have a different name.

3. Access this saved report from the Saved Reports section at the bottom of the Reports page.

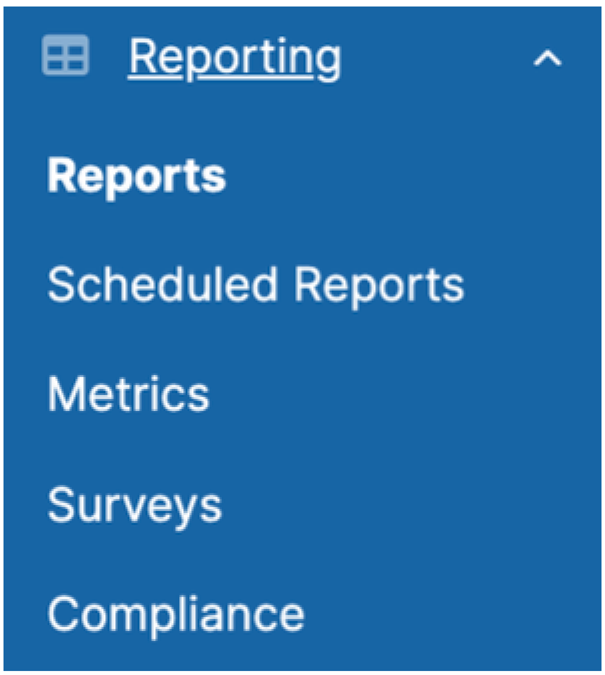
Important Tips:

1. When sharing the report, please be sure to export the report as a **.CSV file.**
2. Ensure there are **no groupings** in the report.

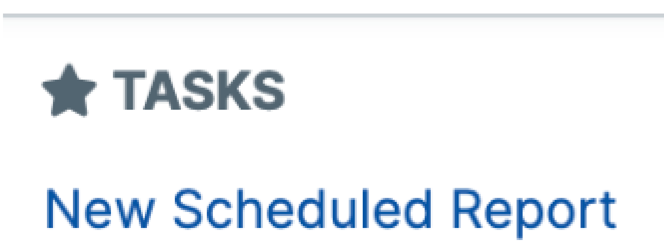
Schedule Report

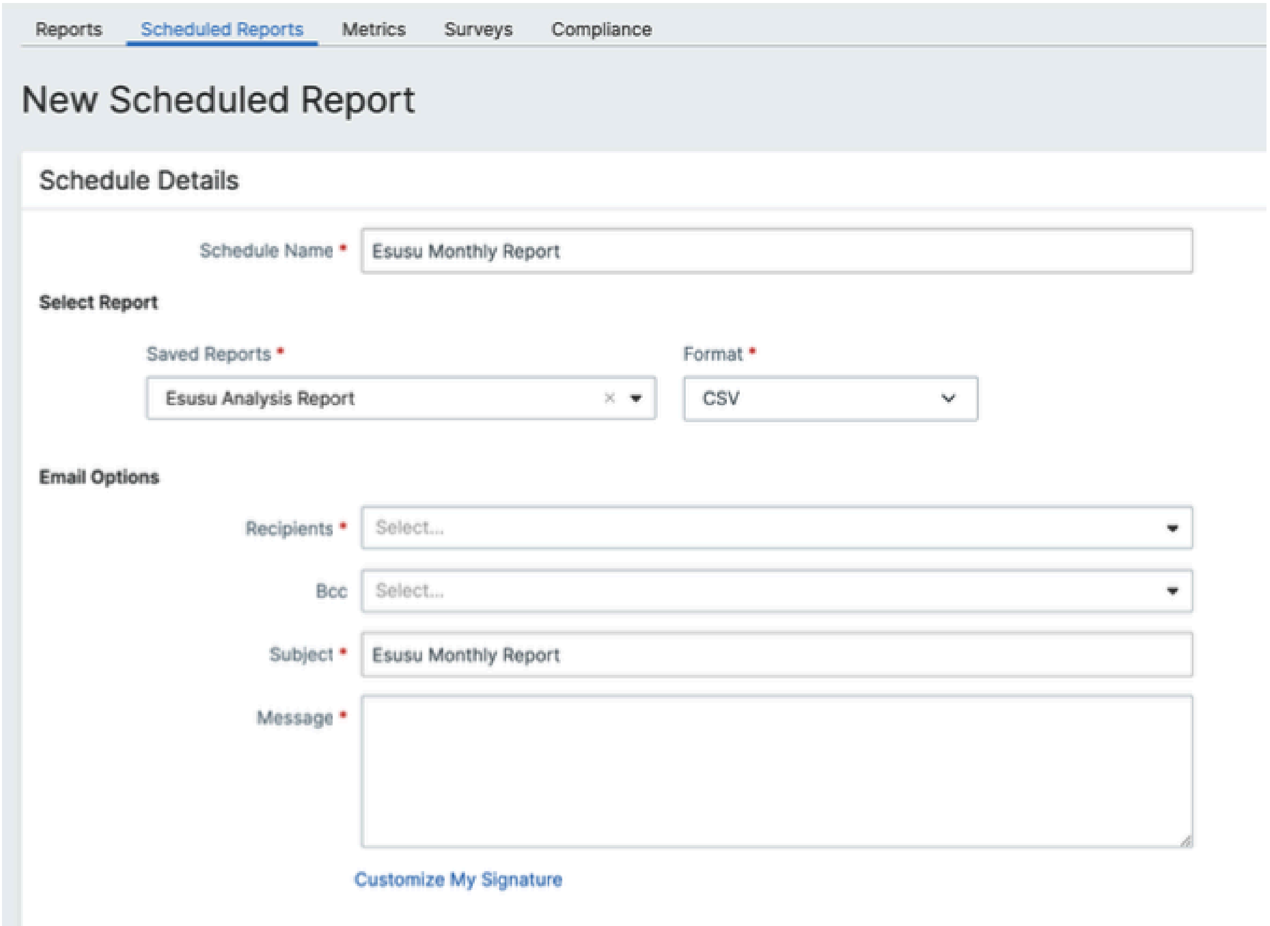
Once you have completed building your Esusu report, you will need to schedule the report to be sent each month.

- Click on **Scheduled Reports**.



- Click on **New Scheduled Report** located on the right side of the screen

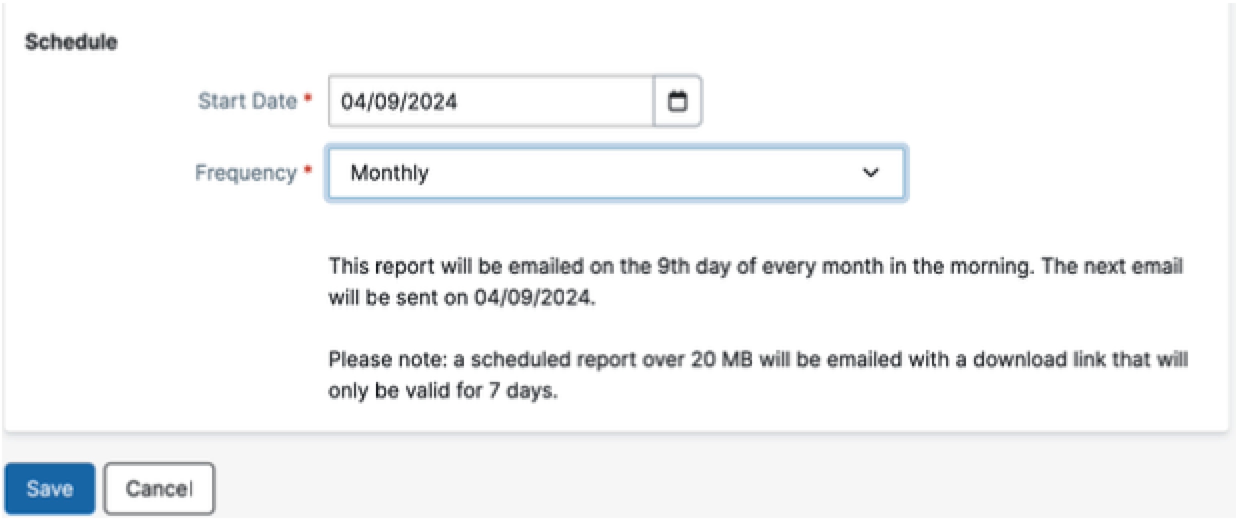




- **Schedule Details**
    a. Scheduled Name: **Esusu Monthly Report**
- **Select Report**
    a. Save Reports: *Name of the new created Esusu Report*
    b. Format: **CSV**
- **Email Options**
    a. Recipients: [<company-code>@upload.esusu.org](mailto:company-code@upload.esusu.org). (Note: Please reach out to your Account Manager/Customer Experience Manager for your company code)
    b. Subject: **Esusu Rent Reporting**
    c. Message: **Rent reporting files**

- **Schedule**

Please select the ninth of the following month.



a. Start Date: ***Ninth of every month***
b. Frequency: **Monthly**