



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	<ul style="list-style-type: none">• Updated from Tenant Address 1 to Tenant Street Address 1• Updated Recipient address

Contents

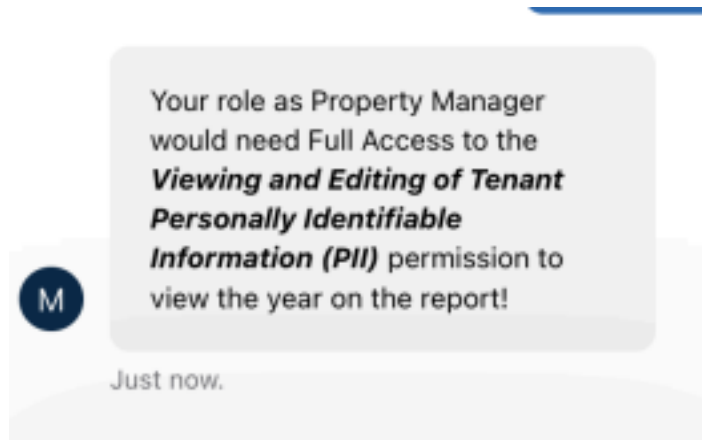
Overview	4
Prerequisite	4
Build a New Report	5
Combine Data from Multiple Reports	6
Setting Up Filters	8
Save a Custom Report	11
Schedule Report	13
Accessing the Esusu Portal	15
Upload Data Report	17

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

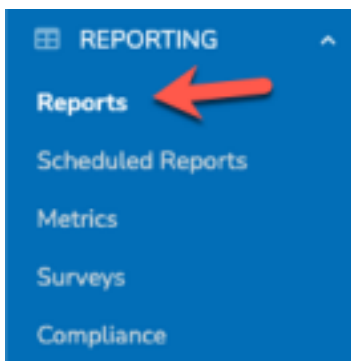
Build a New Report

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

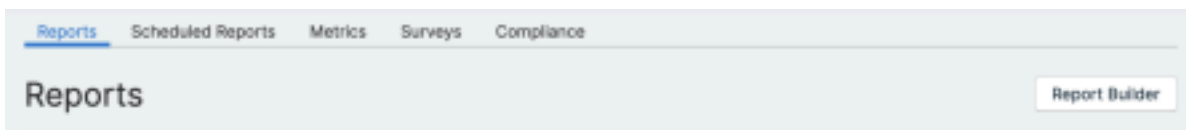
Select a Base Report

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 x ▼

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**.

Add Columns From Other Reports

Search

▼ Aged Receivable Detail

▲ Delinquency

- Unit
- Name
- Tenant Status
- Tags

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

Add Columns From Other Reports

Search

<input type="checkbox"/> Amount Receivable
<input type="checkbox"/> Delinquent Subsidy Amount
<input checked="" type="checkbox"/> 0-30
<input type="checkbox"/> 30+
<input checked="" type="checkbox"/> Last Payment
<input type="checkbox"/> Payment Amount

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

The screenshot shows the 'Customize Report' interface with the 'Filters' tab selected. The settings are as follows:

- Tenants:** A dropdown menu set to 'Show Active Tenants'.
- Tenant Status:** A selection area with 'Select: All None' and '2 items selected'. The selected items are 'Current' and 'Notice'. Other options include 'Future', 'Past', and 'Evict'.
- Tenant Type:** A selection area with 'Select: All None' and '2 items selected'. The selected items are 'Financially Responsible' and 'Co-signer'. Other options include 'Other Occupant'.
- Properties:** A search box with the text 'Search by property, group, portfolio, or owner' and a dropdown menu set to 'Show Active Properties'.

An 'Update' button is located at the bottom left of the form.

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**

^ Filter Columns From Other Reports

Delinquency

Delinquency Note
Range

Last Month

Tenant Status

Select: All None

2 items selected

All

Future

Current

Notice

Past

Tags

Amount Owed In
Account

Rent Income

Balance

Greater than or equal to

-999999

Include future dated charges

3. Click **Update**

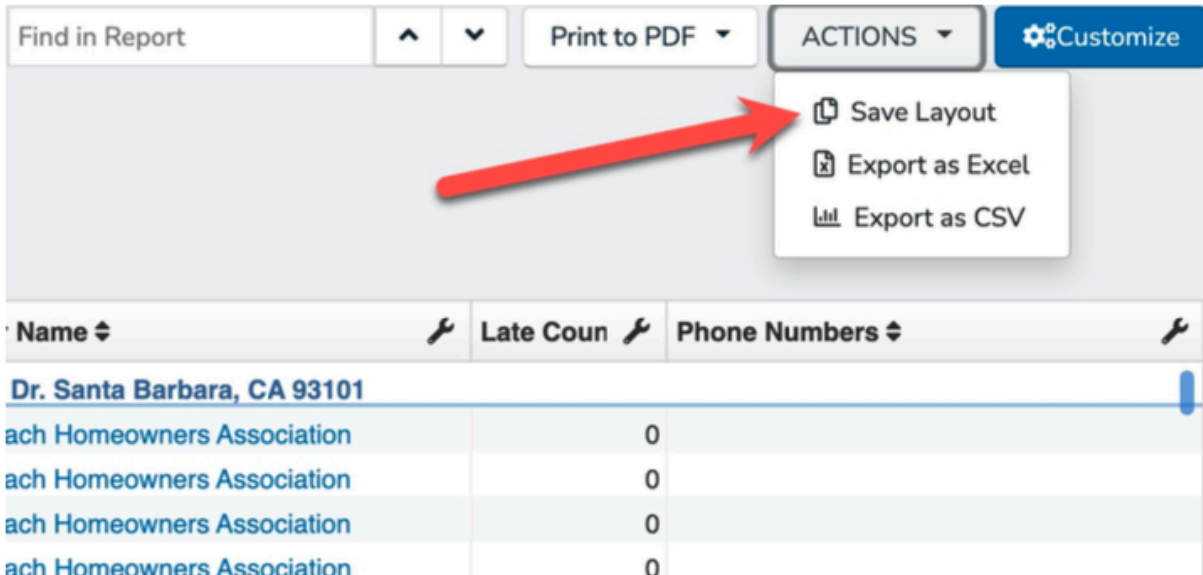
4. Arrange data points in the following order:

- 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.



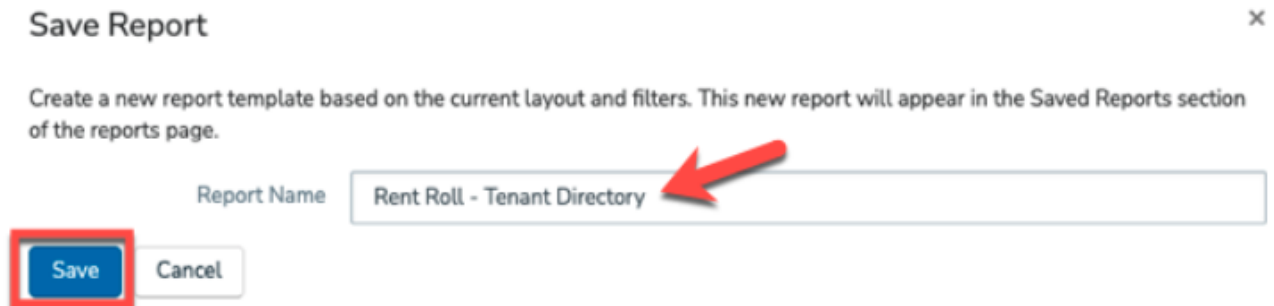
The screenshot shows the top right corner of a report interface. It includes a search bar labeled 'Find in Report', a 'Print to PDF' button, an 'ACTIONS' dropdown menu, and a 'Customize' button. The 'ACTIONS' menu is open, showing three options: 'Save Layout', 'Export as Excel', and 'Export as CSV'. A red arrow points to the 'Save Layout' option. Below the menu is a table with columns: 'Name', 'Late Coun', and 'Phone Numbers'. The table contains a header row and four data rows, all with '0' in the 'Late Coun' column.

Name	Late Coun	Phone Numbers
Dr. Santa Barbara, CA 93101		
ach Homeowners Association	0	
ach Homeowners Association	0	
ach Homeowners Association	0	
ach Homeowners Association	0	

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



The screenshot shows a 'Save Report' dialog box. It has a title bar with a close button (X). Below the title bar is a text area with the instruction: 'Create a new report template based on the current layout and filters. This new report will appear in the Saved Reports section of the reports page.' Below this is a 'Report Name' input field containing the text 'Rent Roll - Tenant Directory'. A red arrow points to this input field. At the bottom left, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

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.

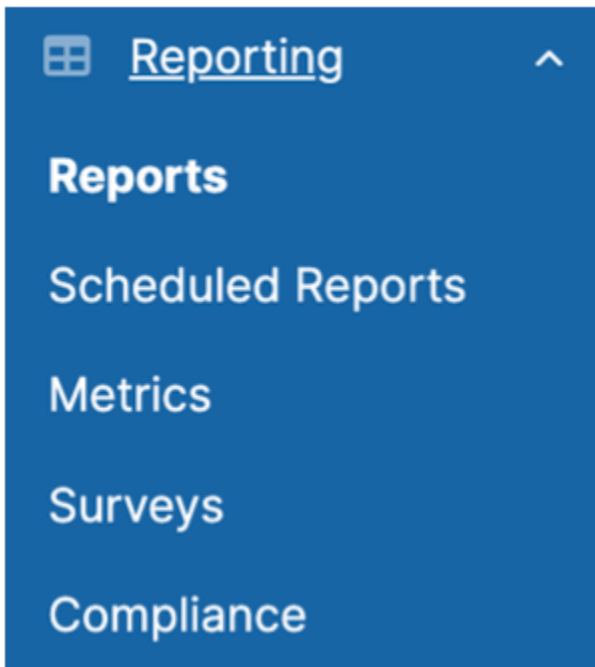
Important Tips:

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

★ TASKS

[New Scheduled Report](#)

Reports Scheduled Reports Metrics Surveys Compliance

New Scheduled Report

Schedule Details

Schedule Name * Esusu Monthly Report

Select Report

Saved Reports * Esusu Analysis Report × Format * CSV

Email Options

Recipients * Select...
Bcc Select...
Subject * Esusu Monthly Report
Message *


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- **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 . (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.

Schedule

Start Date * 04/09/2024 

Frequency * Monthly 

This report will be emailed on the 9th day of every month in the morning. The next email will be sent on 04/09/2024.

Please note: a scheduled report over 20 MB will be emailed with a download link that will only be valid for 7 days.

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