

Sage Intacct

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Credit Card Expense Management - Entering/Reconciling Transactions

(SOP) for Entering Expenses, Receipts, and Credit Card Transactions into Sage Intacct

Purpose

This SOP provides detailed instructions for employees to enter expenses, attach corresponding receipts, and pull assigned credit card transactions into the Sage Intacct Expense Module, ensuring accurate reporting and timely reimbursement.

Scope

This procedure applies to all employees who need to report business-related expenses, submit receipts, and reconcile assigned credit card transactions through Sage Intacct.

Procedure

1. Accessing the Sage Intacct Expense Module

- **Step 1.1:** Log in to Sage Intacct using your company-provided credentials.
- **Step 1.2:** Navigate to the **Expense Module** by selecting the **Time & Expenses** tab from the main dashboard.
- **Step 1.3:** Click on **My Expenses** to access your expense reporting section.

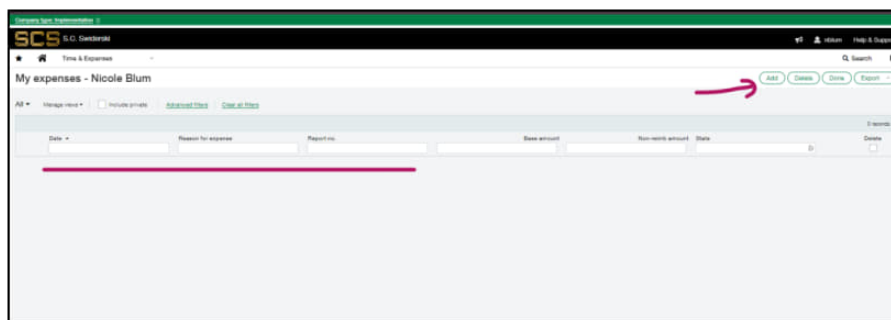
2. Creating a New Expense Report

AI PER DIEMS AND MILEAGE for payroll reimbursement will remain in Paylocity.

This process is best done on a computer. I can be done on the web browser of any iPad or phone as well.

****You will create an expense report for each card you are issued. If you have a Marcus Card and have a vehicle that is issued a Kwik Trip Card – you will submit two expense reports.**

- **Step 2.1:** Click on **Add** to start a new expense report. (top right area of screen)



*If you have any previous submitted expense reports they will show where the large line is.

- **Date Filed will auto fill to “today’s date”.**
- **Expense report number will auto fill “new”.**
- **Attachment is where you will enter (or drop) your receipts.**
- **Do not edit GL Posting Date**
- **Step 2.2: Enter a Reason For Expense Report**
 - Example: Purchases for Moon Lake
 - Example: Team Meeting
 - Example: S62 Fuel
- **Step 2.3: Enter a Memo**
 - Please enter Your Name + Card
 - Example: Nicole Blum – Menards
 - Example: Nicole Blum – Kwik Trip
 - Example: Nicole Blum – Marcus

The screenshot shows a form titled "Expense report info" with the following fields and values:

- Date filed ***: 08/20/2024
- Employee**: 16879523--Nicole Blum
- Expense report number**: New
- GL posting date**: 08/20/2024
- Attachment**: (empty field with a plus icon and a trash can icon)
- Reason for expense ***: S62 Fuel
- Memo**: Nicole Blum - Kwik Trip

3. Entering Expense Details – Manual (Only used for Personal Credit Card Transactions)

- **Step 3.1:** For manually entered expenses, click **+ Add Line** to enter a new expense item. (+ sign next to the trash can on the far, far, right of the Expense Entries lines.)
- **Step 3.2:** Fill in the **Date** – this should be the transaction date. (date purchase was made)
- **Step 3.3:** In the **Expense Type** dropdown, select the appropriate category (you will recognize these groupings from our current coding)
- **Step 3.4:** Enter the **Amount**. (if the transaction requires splitting, you should create multiple lines with all these required fields)
- **Step 3.5:** Select **Payment Type** – for manual this should only be Personal Credit Card
 1. You will see that Linked to Credit card txn will not have a check mark.
 2. You will see that on the far right side of the screen, Non-reimb will remain unchecked. This will ensure that you receive reimbursement via ACH because you paid for it yourself and it was a company expense.
- **Step 3.6:** Select yourself for **Employee**.

- **Step 3.7:** Cost code **Company, Department, Property** (*if applicable* – if applicable, ensure you at to at least the Phase (PP) level, deeper the better), **Project** (this will be used for most expenses as Pass Thru if not related to a construction project), **Cost Code, Cost Type**.
- **Step 3.8:** Enter the **Paid for** – this should be a synopsis to specify the purpose or reason for the expense by item.
 1. Business Meeting: If the expense was incurred during a business meeting, you might enter "Lunch with client" or "Team meeting refreshments."
 2. Travel: If the expense was for travel, you might enter "Flight to New York for client meeting."
 3. Supplies: For office supplies, you might enter "Office stationery for Q3."
 4. Fuel: Fuel for S62 or off-road fuel for C12
- **Step 3.9:** Enter the **Paid to** – this should be the merchant you paid.
 1. Example: Staples, Uber, Shell, Home Depot

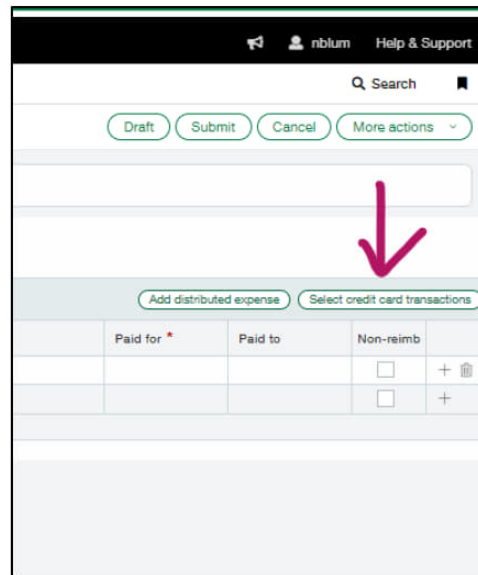
Expense entries																
View details Add a new expense Submit new entry																
	Date	Expense type *	Amount *	Payment type	Linked to credit card txn	Employee	Company	Department	Property	Project	Cost Code	Cost type	Paid for *	Paid to	Non-REMB	
1	05-18-2024	Building Papers	348.82	Personal Credit Card	<input type="checkbox"/>	18571823-1004 BU	E100-S.C. Swaleski	DOB-Insurance	PR00004-Bus Store	1848 Pass Thru-134	EMEP004-Printing 2	EMEP-Building Paper	Print Supplies	Staples USA Inc	<input type="checkbox"/>	
2					<input type="checkbox"/>		E100-S.C. Swaleski	DOB-IT	PR007-Corporate - 42						<input type="checkbox"/>	
Total			348.82													

2. After completing all fields, click "**Submit**" to submit your expense report for approval.

4. Entering Expense Details – From Imported Transactions

Best Practice: I recommend doing your easiest transactions first – any that **DO NOT** need itemizing break outs you are doing yourself (Example: Marcus). Menards is preloaded with the itemization. Kwik trip is single transactions. Do all your break outs at once.

- **Step 4.1:** You will select what transactions (Erika) has loaded for you to reconcile. You will do this by clicking **Select Credit Card Transactions** (top of the expense entries on the far right).
- **Step 4.2:** Once you click the Select Credit Card Transactions, another screen will pop up. This is where you will select the transactions you will want to add.
 1. You will want to only click the ones you are reconciling on this single report. DO NOT ADD them all.
 2. Best Practice will be to pull expenses by card type. Best practice for Menards would be to pull only the same reference numbers (that is one receipt) at a time.



Select credit card transactions

Total selected amount
--

Items selected 0

<< < Page 1 of 3 > >>

<input type="checkbox"/>	Date	Description/memo	Amount	Amount remaining	Amount to apply	Allocation	Paid to	Paid for	Card account
<input type="checkbox"/>	08/20/2024	--	3.00	3.00	Amount to apply	Allocation	Paid to	Paid for	MARCUS--MC
<input type="checkbox"/>	08/15/2024	--	19.00	19.00					MARCUS--MC
<input type="checkbox"/>	07/31/2024	--	700.00	700.00					MARCUS--MC
<input type="checkbox"/>	08/01/2024	--	1,000.00	1,000.00					MARCUS--MC
<input type="checkbox"/>	08/02/2024	--	2,000.00	2,000.00					MARCUS--MC
<input type="checkbox"/>	08/03/2024	--	3,000.00	3,000.00					MARCUS--MC

A red arrow points to the 'Card account' column header in the table.

*These are all single Marcus transactions I must reconcile and cost code. If any of these purchases required multiple cost codes for each receipt line item – that will include some additional steps.

Select credit card transactions

Total selected amount
10,000.00

Items selected 3

<< < Page 1 of 3 >

<input type="checkbox"/>	Date	Description/memo	Amount	Amount remaining	Amount to apply	Allocation	Paid to	Paid for	Credit card account
<input type="checkbox"/>	08/20/2024	--	3.00	3.00					MARCUS--MC
<input type="checkbox"/>	08/15/2024	--	19.00	19.00					MARCUS--MC
<input type="checkbox"/>	07/31/2024	--	700.00	700.00					MARCUS--MC
<input type="checkbox"/>	08/01/2024	--	1,000.00	1,000.00					MARCUS--MC
<input checked="" type="checkbox"/>	08/02/2024	--	2,000.00	2,000.00	2,000.00				MARCUS--MC
<input checked="" type="checkbox"/>	08/03/2024	--	3,000.00	3,000.00	3,000.00				MARCUS--MC
<input checked="" type="checkbox"/>	08/04/2024	--	5,000.00	5,000.00	5,000.00				MARCUS--MC

Add selected Cancel

Example: I selected three transactions totaling \$10,000 to reconcile in this report.

Select credit card transactions

<input type="checkbox"/>	Date	Description/memo	Amount	Amount remaining	Amount to apply	Allocation	Paid to	Paid for	Credit card account
<input type="checkbox"/>	08/05/2024	Test	200.00	200.00					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	490.02	490.02					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	10.45	10.45					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	23.87	23.87					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	15.98	15.98					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	39.99	39.99					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	29.97	29.97					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	19.99	19.99					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	23.95	23.95					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	14.99	14.99					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	104.99	104.99					MENARDS--OTHER
<input type="checkbox"/>	08/05/2024	3107220000000000.00	139.98	139.98					MENARDS--OTHER

Add selected Cancel

*Menards transactions are itemized already for you to reconcile. In the column next to the date (Description/Memo) – (Erika) will load all of the transaction numbers. If the number is the same, they belong on the same receipt. You will want to load one receipt at a time to the report for Menards. Highly recommended to submit a report for each Menards receipt. This will reduce errors and ensure you close out the entire receipt and don't miss items.

- **Step 4.3:** Select the transaction(s) you are reconciling and click **Add selected**
- **Step 4.4:** Fill in the **Date** – this should be the transaction date. (date purchase was made)
- **Step 4.5:** In the **Expense Type** dropdown, select the appropriate category (you will recognize these groupings from our current coding)
 1. If the credit card expense is for an active construction project. You will select **Construction Project** for the Expense Type.

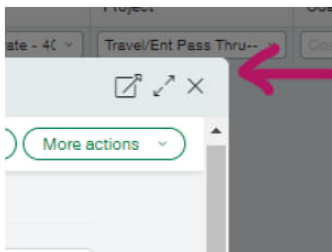
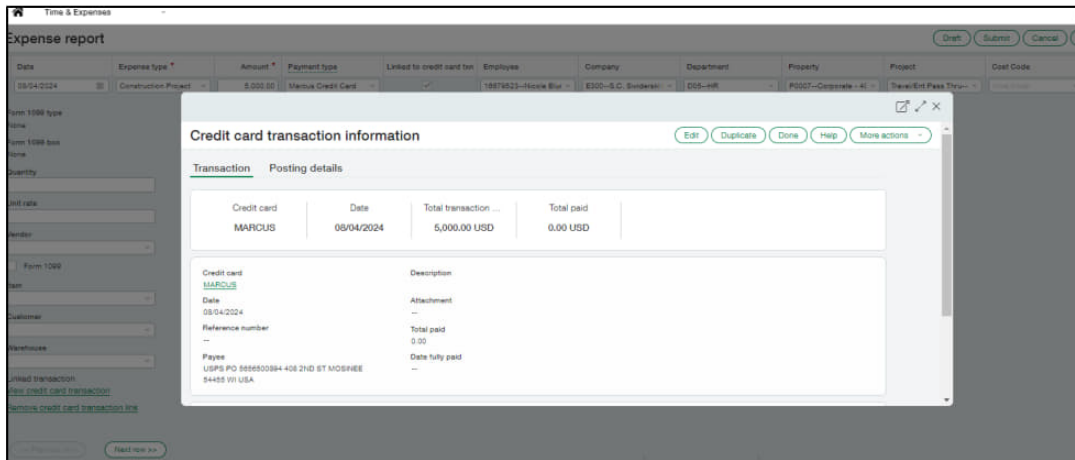
- **Step 4.6:** Enter the **Amount**. (if the transaction requires splitting, you should create multiple lines with all these required fields)
- **Step 4.7:** Select **Payment Type**
 1. You will notice that **Linked to Credit Card Txn** will automatically check.
 2. As you select the card type, **Non-reimb** will also auto check. Meaning this is a transaction that will not result in your receiving funds back.
- **Step 4.8:** Select yourself for **Employee**.
- **Step 4.9:** Cost code **Company, Department, Property** (if applicable – if applicable, ensure you at to at least the Phase (PP) level, deeper the better), **Project** (this will be used for most expenses as Pass Thru if not related to a construction project), **Cost Code, Cost Type**.
 1. If the credit card expense is for a construction project. You will select the actual live project (Example: ATH-713) and the applicable cost code (CSI Job Cost Code), cost type for the expense.
- **Step 4.10:** Enter the **Paid for** – this should be a synopsis to specify the purpose or reason for the expense by item.
 1. Business Meeting: If the expense was incurred during a business meeting, you might enter "Lunch with client" or "Team meeting refreshments."
 2. Travel: If the expense was for travel, you might enter "Flight to New York for client meeting."
 3. Supplies: For office supplies, you might enter "Office stationery for Q3."
 4. Fuel: Fuel for S62 or off-road fuel for C12
- **Step 4.11:** Enter the **Paid to** – this should be the merchant you paid.
 1. Example: Staples, Uber, Shell, Home Depot

The screenshot shows an 'Expense report' form with the following details:

- Date:** 08/04/2024
- Expense type:** Construction Project
- Amount:** 5,000.00
- Payment type:** Manual Credit Card
- Linked to credit card txn:**
- Employee:** 10879223--Nicole Blu
- Company:** E205--S.G. Swiderka
- Department:** 005--HR
- Property:** P007--Corporate - 41
- Project:** Travel/Ent Pass Thru
- Cost Code:** Cost Code
- Cost Type:** Cost Type

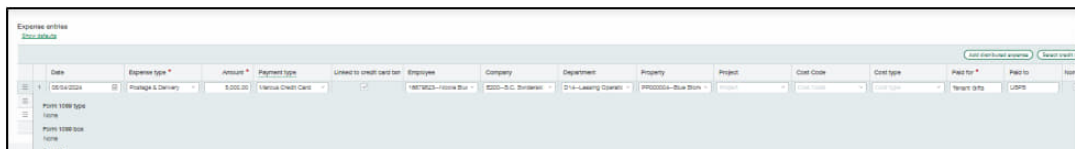
Form 1099 type: None
 Form 1099 box: None
 Quantity:
 Unit rate:
 Vendor:
 Form 1099
 Item:
 Customer:
 Warehouse:
 Linked transaction: [View credit card transaction](#) (highlighted with a red arrow)
[Remove credit card transaction link](#)

While entering the expense if you forget what you are cost centering or what the transaction was for, you can click **View Credit Card Transaction**. This will show you all the specific details about the transaction that was imported for you.



*If you want to make the screen bigger or close anything, these options in the top right corner let you do that.

So, looking at my example; based on the import details and the receipt in front of me. This transaction was for multiple properties. So, I must split this transaction. If I was only cost coding this one transaction as one line item, it would look like this.



Next are the instructions to split this transaction to multiple properties by lump sums.

- **Step 4.12: If a transaction requires itemizing. (Multiple cost centers to report)**
 1. **Select the Transaction to Itemize**
 - **Step 4.12.1:** Find and select the credit card transaction that you want to itemize. Once Selected the “Amount to apply” auto fills to the total amount of the imported transaction.
 - **Step 4.12.2:** Enter the amount you want to apply.

- **Step 4.12.3:** You will repeat this step until the Amount Remaining is \$0.

Select credit card transactions

<input type="checkbox"/>	Date	Description/memo	Amount	Amount remaining	Amount to apply	Allocation	Paid to	Paid for
<input type="checkbox"/>	08/20/2024	--	3.00	3.00				
<input type="checkbox"/>	08/15/2024	--	19.00	19.00				
<input type="checkbox"/>	07/31/2024	--	700.00	700.00				
<input type="checkbox"/>	08/01/2024	--	1,000.00	1,000.00				
<input checked="" type="checkbox"/>	08/02/2024	--	2,000.00	2,000.00	1,000.00			
<input type="checkbox"/>	08/03/2024	--	3,000.00	3,000.00				
<input type="checkbox"/>	07/31/2024	--	223.97	223.97				
<input type="checkbox"/>	08/05/2024	3107220000000000.00	10.45	10.45				
<input type="checkbox"/>	08/05/2024	3107220000000000.00	23.97	23.97				

Add selected Cancel

- **Step 4.12.4:** Click Add selected in the bottom right corner. You have no added \$1000 to your expense report associated to the credit card transaction.
- The system will update how much is left.

Select credit card transactions

<input type="checkbox"/>	Date	Description/memo	Amount	Amount remaining	Amount to apply	Allocation	Paid to	Paid for
<input type="checkbox"/>	08/20/2024	--	3.00	3.00	Amount to apply	Allocation	Paid to	Paid for
<input type="checkbox"/>	08/15/2024	--	19.00	19.00				
<input type="checkbox"/>	07/31/2024	--	700.00	700.00				
<input type="checkbox"/>	08/01/2024	--	1,000.00	1,000.00				
<input type="checkbox"/>	08/02/2024	--	2,000.00	1,000.00				
<input type="checkbox"/>	08/03/2024	--	3,000.00	3,000.00				
<input type="checkbox"/>	07/31/2024	--	223.97	223.97				
<input type="checkbox"/>	08/05/2024	3107220000000000.00	10.45	10.45				
<input type="checkbox"/>	08/05/2024	3107220000000000.00	23.97	23.97				

Add selected Cancel

Select credit card transactions

<input type="checkbox"/>	Date	Description/memo	Amount	Amount remaining	Amount to apply	Allocation	Paid to	Paid for
<input type="checkbox"/>	08/20/2024	--	3.00	3.00				
<input type="checkbox"/>	08/15/2024	--	19.00	19.00				
<input type="checkbox"/>	07/31/2024	--	700.00	700.00				
<input type="checkbox"/>	08/01/2024	--	1,000.00	1,000.00				
<input type="checkbox"/>	08/02/2024	--	2,000.00	1,000.00	500.00			
<input type="checkbox"/>	08/03/2024	--	3,000.00	3,000.00				
<input type="checkbox"/>	07/31/2024	--	223.97	223.97				
<input type="checkbox"/>	08/05/2024	3107220000000000.00	10.45	10.45				
<input type="checkbox"/>	08/05/2024	3107220000000000.00	23.97	23.97				

Add selected Cancel

- I have two more parts of the transaction. In increments of \$500.

Select credit card transactions

<input type="checkbox"/>	Date	Description/memo	Amount	Amount remaining	Amount to apply	Allocation	Paid to	Paid for
<input type="checkbox"/>	08/20/2024	--	3.00	3.00				
<input type="checkbox"/>	08/15/2024	--	19.00	19.00				
<input type="checkbox"/>	07/31/2024	--	700.00	700.00				
<input type="checkbox"/>	08/01/2024	--	1,000.00	1,000.00				
<input checked="" type="checkbox"/>	08/02/2024	--	2,000.00	500.00	500.00			
<input type="checkbox"/>	08/03/2024	--	3,000.00	3,000.00				
<input type="checkbox"/>	07/31/2024	--	223.97	223.97				
<input type="checkbox"/>	08/05/2024	3107220000000000.00	10.45	10.45				
<input type="checkbox"/>	08/05/2024	3107220000000000.00	23.97	23.97				

Add selected Cancel

- Go back to “Select Credit Card Transaction” as many times as needed to break it out. **Continue adding line items until the total amount matches the original transaction amount and no longer shows in your “Select Credit Card Transaction” import screen.**
- Once done, your report should have the original transaction now broken out for you to cost code in lump sums based on your properties, companies, etc.

Expense entries

[Show defaults](#)

	Date	Expense type *	Amount *	Payment type	Linked to credit card txn	Employee
≡ 1	08/02/2024		1,000.00		<input checked="" type="checkbox"/>	16679523--Nicole Blur
≡ 2	08/02/2024		500.00		<input checked="" type="checkbox"/>	16679523--Nicole Blur
≡ 3	08/02/2024		500.00		<input checked="" type="checkbox"/>	16679523--Nicole Blur
≡ 4					<input type="checkbox"/>	
≡ 5					<input type="checkbox"/>	
Total			2,000.00			

2. Begin Itemizing the Transaction

- When doing the splitting I highly recommend making the box bigger using the maximize screen feature. This is easier to see all fields.



3. Enter Details for Each Line Item

- Step 4.12.5:** For each line item, fill in all the same fields as required and explained above in this SOP.

- Once you have finished entering all required fields (as discussed earlier) you will attach the receipt.

5. Attaching Receipts

- **Step 5.1:** After entering the expense details, you will need to attach the receipt(s).
- **Step 5.2:** Upload the corresponding receipt(s) by:
 - **Step 5.2.1:** Selecting the receipt file from your computer or device (PDF, JPG, or PNG formats are preferred).
 - **Step 5.2.2:** Dragging and dropping the receipt into the attachment upload area.
 - **Please Note:** Only one attachment is allowed. Please combine receipts into one PDF or picture. If you attach one and then try to attach another, it will just override the first photo.
- **Step 5.3:** Ensure the receipt is clear and legible, showing all relevant details (date, amount, vendor). **Your signature on the receipt is required.** If the receipt is damaged, please reach out to Erika before submitting. Compliance and Tax requirements require the picture of the receipt attached to be very legible and able to be printed for just as good as the original copy. TAKE CARE OF YOUR RECEIPTS.

6. Submitting the Expense Report

- **Step 6.1:** Once all expenses are entered, credit card transactions are imported, and receipts are attached, review the entire report for completeness.
- **Step 6.2:** Click **Submit** to send the expense report for approval.
- **Step 6.3:** Monitor the status of the submitted report in the **My Expenses** section to ensure it is approved and processed.
- **Step 6.3:** If you need to recall the expense report due to errors, you can do that in your “My Expenses” dashboard.

The screenshot shows the 'My expenses - Nicole Blum' dashboard. At the top, there are navigation buttons: 'Add', 'Create', 'Clone', and 'Export'. Below this, there are filters for 'All', 'Manage view', 'Hide private', 'Completed', and 'Clear all filters'. A table displays the expense details:

Date	Reason for expense	Receipt no.	Basic amount	Non-reimb amount	Status	Details
08/20/2024	Postage for "Miami City"	61-0000	\$1,000.00	\$1,000.00	Submitted	View

**Once submitted it will show the state Submitted. It will go to your supervisor for approval.

7. Responding to Approval Requests

- **Step 7.1:** If your manager or approver requests additional information or clarification, you will receive a notification.
- **Step 7.2:** Address the request by:
 - **Step 7.2.1:** Clicking on the expense report to view the comments or requested changes.
 - **Step 7.2.2:** Making necessary adjustments, such as updating descriptions or correcting amounts.
 - **Step 7.2.3:** Reattaching any required documentation.
- **Step 7.3:** Resubmit the report for approval after making the requested changes.

8. Tracking Reimbursement

- **Step 8.1:** After approval, track the reimbursement status in the **My Expenses** section.
- **Step 8.2:** Ensure that the reimbursement is processed according to your company's payment schedule.
- **Step 8.3:** Contact the finance or payroll department if there are any issues or delays.

All receipts after submittal of your expense report can be thrown away. All Menards receipts with a rebate attached should be turned into Erika (Accounting). You may have a department rep that ensures they get to Erika. **ORIGINAL Menards receipts with the rebate attached must make it to accounting.** All rebates are property of SCS.

Purchasing Flow

Spend Need → Purchase Requisition → Manager Approves → PO Created → Purchase Made →
Receive Items → Submit Invoice for Payment → Invoice Verified for Accuracy → **Invoice Paid**

FIELDS FOR PURCHASE REQUISITION

***If you do not code this correctly the first time, or you enter the wrong amount of spend, your invoice for payment will be denied, the PO will need to be fixed and resubmitted for approval, before the invoice will be paid.

Purchase Requisition-PREQ-000011 Print or email Post Cancel More actions

Transaction History

Transaction date	Date due	Item totals	Subtotals	Transaction total	Transaction status
08/14/2024	09/13/2024	500.00	0.00	500.00	Pending

Date * 08/14/2024

Vendor V-000009--A&J Landscape & Maintenance Pay to A&J Landscape & Maintenance Return to A&J Landscape & Maintenance

Project 1765 B County Hwy SS Rice Lake, WI 54866 United States 1765 B County Hwy SS Rice Lake, WI 54866 United States

Document number PREQ-000011 asnjlandscape@gmail.com asnjlandscape@gmail.com

Payment terms Net 30 Vendor document number Attachment Message State Pending Shipping method

> Shipping dates

Entries [Show defaults](#)

	Company	Department	Property	Project	Cost Code	Cost type	Item ID *	Quantity *	Unit	Price *	Extended price	
1	E200--S.C. Swiderski I	D13--Grounds	B0000117--1420 West	Grounds Pass Thru--G	GRND00003--Pest Co	GRNDS--Grounds	60100--Grounds	1.00	Each	500.00	500.00	+
2												+
Total											500.00	

Property Expense Guide

Property Expenses

Do not get the Project Pass Thru confused with project expenses. We are using this to create deeper cost coding for PROPERTY and OPS expenses. Projects will also have projects for construction in there – do not use them without approval.

Required Fields

- Date
- Expense Type
- Amount
- Payment Type (what card?)
- Linked to Credit Card Txn (check)
- Vendor
- Paid for (Business Purpose)
- PO (when applicable)

Required Dimensions

- Employee (if applicable)
- Company
- Department
- Property

We will discuss Property in deeper in the next slide!

Project Pass Thru

- Select a project pass thru type – again this is related to your expense type.
- Cost Code – sub account of the pass thru (the list will get smaller as you select – you will only see what you can use based on your PROJECT).
- Cost Type – Select what is available.

All expenses will require an expense type. You will recognize the categories from our current expense header accounts. Choose the one that best describes the purchase.
If you see any default fields, this is a holding place – edit over.

Use the Safety Portal for reference on address plans by Phase (PP).

Property Dimension

Units, Buildings, Phases, Parents, all roll up into Regions. You are **required** to minimally cost code in the PP phase. **Do not** use the R or P phase unless it's for the total property. Use B and U codes as much as possible.

R007	Central
P0004	Blue Stone Estates
PP000004	Blue Stone Estates
B0000412	940 Blue Stone Lane #1-#12
U00003079	B9940-01
U00003080	B9940-02
U00003081	B9940-03
U00003082	B9940-04
U00003083	B9940-05
U00003084	B9940-06
U00003085	B9940-07
U00003086	B9940-08
U00003087	B9940-09
U00003088	B9940-10
U00003089	B9940-11
U00003090	B9940-12

When searching fields in Intacct - use the % sign with a key word, and it will pull ANYTHING that matches!

Properties are now divided by Regions

Parent property locations roll up to Region

Phases make up the Parent Property

Buildings make up the Phases

Units make up the Buildings

Region

Parent

Phase

Building

Unit

R

P

PP

B

U

Searching efficiency is key! Use the % sign in search bars! Practice trying to find the properties you work with most. Searching using the address is important and usually the best way. U matches the unit numbers in AppFolio. All drop downs are searchable.