



Case Study

How we helped a Property Management Firm Regain Control of Its Financial Records

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— Client Background

A property management company in Texas, overseeing 1,200 rental units, was struggling with disorganized financial records.

Their accounting processes were riddled with inaccuracies, delaying reporting and compliance.

They turned to AccuBooks to help restore clarity and order to their bookkeeping.

— Challenges Faced

The client encountered several key issues:

Disorganized Financial Data

The company's books contained duplicate entries and missing transactions, leading to inaccurate reporting. This caused confusion in financial decision-making and reduced operational confidence.

Tax Filing Delays

Incomplete and incorrect financial records placed the company at risk of missing tax deadlines. Management feared penalties and other complications.

Ineffective Use of Software

Their accounting software, AppFolio, was not configured to fit their needs. This left their team reliant on manual processes prone to errors.

— How we helped

AccuBooks implemented a tailored approach to directly address these challenges:

Thorough Financial Review

We analyzed the client's financial data to identify errors and missing entries. This allowed us to create an actionable plan for correcting and organizing their books.

Corrected and Structured Records

Our team addressed past inaccuracies by fixing duplicate transactions and filling gaps in their records. We also reorganized their accounts to align with property management standards.

Tailored Software Setup

We reconfigured AppFolio to better match the company's requirements. Additionally, we trained their team to use the software effectively, improving daily accounting tasks.

Prepared Accurate Tax Documentation

Once the records were up to date, we compiled the necessary documents for tax filing. This ensured the client could meet deadlines without the risk of penalties.

— Results at a Glance

450+

Inaccuracies Resolved

Eliminated duplicate entries and corrected transaction gaps.

60%

Increase in Efficiency

Accounting tasks became faster and more accurate.

100%

Tax Compliance

All deadlines met with clean and reliable documentation.

— Conclusion

With AccuBooks' expertise, the client achieved accurate, reliable financial records and overcame their previous challenges.

They are now better positioned for compliance and growth.



AccuBooks supports property managers like our client by offering services that help them focus on what matters most to their business.

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