

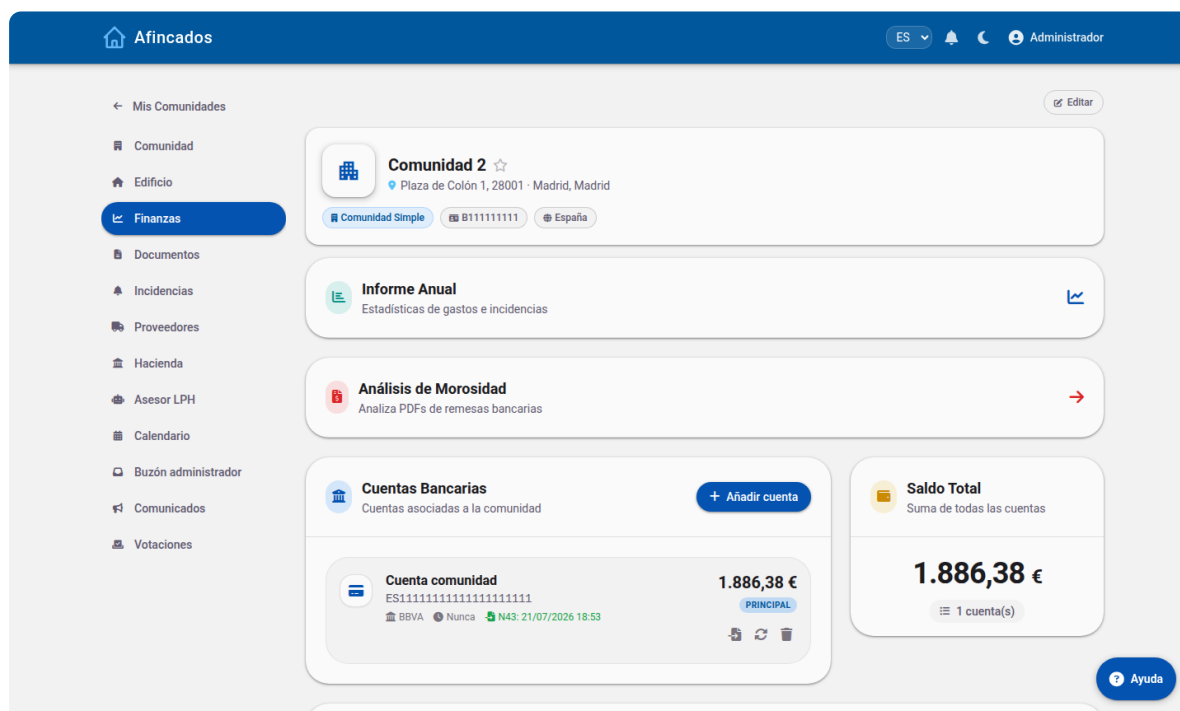
AFINCADOS · HELP CENTER · FEES AND FINANCES

Annual report and AI financial analysis

Produce the year-end accounts as PDF or PowerPoint and get an automatic analysis.

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The **annual report** brings together all the accounts for the financial year: what was budgeted, what was spent, what came in and the final result. It is the document presented to residents at the ordinary meeting to approve the accounts.



The «Annual report» block gathers the year's expense and incident statistics.

Producing the report

1. Open the community and go to the **Finances** tab.
2. Click **Annual report**.
3. Select the **financial year** you want to analyse.

The screen shows the summary: expenses by category, income from fees, a comparison against the budget and the closing balance. You can break it down **by division** (to see what each block spent) or **by owner** (to see what each one contributed).

Exporting

- **PDF:** the formal accounts document, ready to attach to the meeting notice.
- **PowerPoint:** a slide deck with the headline figures and charts, meant to be projected during the meeting.
- **Excel:** the raw data, in case you need to work with it.

Artificial intelligence analysis

The **AI analysis** option reviews the year's accounts and writes a plain-language report highlighting:

- The **variances** against the budget and which categories they came from.
- **Unusual expenses** or ones that have shot up compared with previous years.
- How **arrears have evolved** and their impact on cash flow.
- **Recommendations** for next year's budget.

It is a good starting point for preparing what you will say at the meeting, though you should review its conclusions before presenting them: the AI analyses the data held in the application, so anything you have not recorded will not be taken into account.

Custom questions

With **Custom query** you can ask about the community accounts in plain language ("how much have we spent on plumbing over the last three years?") and download the answer as a PDF.

Who can access it

The report is available to the **property manager** and to **board** members. If you want every resident to see it, export it to PDF and upload it to the community **Documents** tab.