



FINANCE PLATFORM · USER TRAINING

Units

The Units tab is where users view, organize, and create unit records connected to a property. Each unit can include a unit name, parent property, rentable square footage (RSF), and notes for tracking and reporting.

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Units

Unit Name	Property	Occupancy	RSF	
8955-102	N/A	White Rhino	1	
GARAGE	N/A	General Motors, LLC	10,000	
NLA	N/A	Pena Park	1	
Suite 100	N/A	Inventurus Knowledge Solutions (IKS)	10,000	
Suite 100	N/A	Nokia of America Corp (LifeScience)	10,000	
Suite 100	N/A	Avantax, Inc (Blucora)	10,000	
Suite 100	N/A	Meritage Homes of Texas, LLC	10,000	
Suite 100	N/A	Vacant	10,000	
Suite 100	N/A	Signet (Zale)	10,000	
Suite 100	N/A	Caliber Home Loans, Inc.	10,000	
Suite 100	N/A	Knight-Fowler-Millsap, LLC (KFM)	10,000	
Suite 1000	N/A	Verily	10,000	
Suite 110	N/A	E&J Gallo Winery	10,000	
Suite 110	N/A	Caliber Home Loans, Inc.	10,000	
Suite 115	N/A	Vacant	10,000	
Suite 120	N/A	Vacant	10,000	
Suite 125	N/A	Vacant	10,000	
Suite 125	N/A	Vacant	10,000	
Suite 125	N/A	Vacant	10,000	

+ Add Unit



Add a Unit

Create a new unit from the Units page.



Enter Unit Details

Add the unit name, select the parent property, and enter RSF.



Add Notes & Save

Include notes if needed, then submit the unit to save it to the selected property.

1

ADDING A UNIT

2

NEW UNIT FORM

3

UNIT OVERVIEW

4

EDIT UNIT

5

ACCESS ASSIGNED METERS

6

ASSIGNING AND UNASSIGNING METERS

7

ACCESSING INTERNALS

SECTION 1

Adding a Unit

To add a unit in Finance, navigate to the Units tab and click Add Unit. The button appears in a different location depending on whether units already exist.

No Existing Units View

1

Open the **Units** tab from the left navigation menu.

2

If no units exist, click **Add Unit** in the center of the screen.

Existing Units View

1

Open the **Units** tab from the left navigation menu.

2

If units already exist, click **Add Unit** in the top-right corner.

Unit Name	Property	Occupancy	RSF
8955-102	8951 Cypress Waters	White Rhino	1
GARAGE	9111 Cypress Waters	General Motors, LLC	10,000
NLA	8950 Cypress Waters	Pena Park	1
Suite 100	8951 Cypress Waters	Inventurus Knowledge Solutions (IKS)	10,000
Suite 100	3100 Olympus	Nokia of America Corp (LifeScience)	10,000
Suite 100	3200 Olympus	Avantax, Inc (Blucora)	10,000
Suite 100	8840 Cypress Waters	Meritage Homes of Texas, LLC	10,000

SECTION 2

New Unit Form

Fill in the required fields to create a new unit and assign it to a property.

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Dashboard / Units / New Unit

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New Unit

Unit Overview

Unit Details

Name *

Parent Property *

RSF (Rentable Square Footage) *

Notes

0 / 1000

Cancel

Submit

Internals

1

Enter the unit **Name**.

2

Select the **Parent Property** the unit belongs to.

3

Add the unit **RSF** (Rentable Square Footage).

4

Include **Notes** if needed for reference.

5

When the information is complete, click **Submit** to save the unit or **Cancel** to discard changes.

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- ADDING A UNIT
- NEW UNIT FORM
- UNIT OVERVIEW
- EDIT UNIT
- ACCESS ASSIGNED METERS
- ASSIGNING AND UNASSIGNING METERS
- ACCESSING INTERNALS



SECTION 3

Unit Overview

View unit records, search by name, filter by property, open notes and sort columns from the Units page.

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Units

Q Name

Property

Unit Name ↑

Property

Occupancy

RSF

8955-102	8951 Cypress Waters	White Rhino	1
GARAGE	9111 Cypress Waters	General Motors, LLC	10,000
NLA	8950 Cypress Waters	Pena Park	1
Suite 100	8951 Cypress Waters	Inventurus Knowledge Solutions (IKS)	10,000
Suite 100	3100 Olympus	Nokia of America Corp (LifeScience)	10,000
Suite 100	3200 Olympus	Avantax, Inc (Blucora)	10,000
Suite 100	8840 Cypress Waters	Meritage Homes of Texas, LLC	10,000
Suite 100	9111 Cypress Waters	Vacant	10,000
Suite 100	9797 Rombauer	Signet (Zale)	10,000
Suite 100	3401 Olympus	Caliber Home Loans, Inc.	10,000
Suite 100	3501 Olympus	Knight-Fowler-Millsap, LLC (KFM)	10,000
Suite 1000	2999 Olympus	Verily	10,000
Suite 110	9111 Cypress Waters	E&J Gallo Winery	10,000
Suite 110	3401 Olympus	Caliber Home Loans, Inc.	10,000
Suite 115	2999 Olympus	Vacant	10,000
Suite 120	9111 Cypress Waters	Vacant	10,000
Suite 125	2999 Olympus	Vacant	10,000
	8840 Cypress Waters	Vacant	10,000
	3300 Olympus	Vacant	10,000

Cypress ... TABS root

+ Add Unit

1

Use search by Name to quickly find a specific unit record.

2

Use the Property filter to display units for a selected property.

3

The main table displays Unit Name, Property, Occupancy and RSF for each unit.

4

Click the notes icon to review any saved notes for a unit.

Tip:

Click a column header where the arrow appears to sort the column alphabetically or numerically.

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- 2
- 3
- 4
- 5
- 6
- 7
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SECTION 4

Edit Unit

View and edit any unit's information.

1

Click a **unit row** in the **Units table** to open the unit's saved details.

2

Select **Edit** to make changes to the unit record.

3

Update the unit's **Name**, **Parent Property**, **RSF**, and **Notes**.

4

Click **Delete** to permanently remove.

5

Click **Submit** to save changes or **Cancel** to discard them and return to the overview.

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Dashboard / Units

Units

Q Name

Property

Unit Name	Property	Occupancy	RSF	
8955-102	8951 Cypress Waters	White Rhino	1	
GARAGE	9111 Cypress Waters	General Motors, LLC	10,000	
NLA	8950 Cypress Waters	Pena Park	1	
Suite 100	8951 Cypress Waters	Inventurus Knowledge Solutions (IKS)	10,000	
Suite 100	3100 Olympus	Nokia of America Corp (LifeScience)	10,000	

+ Add Unit

< 8955-102

Unit Overview

Meters

Unit Details

Name *

8955-102

Parent Property *

8951 Cypress Waters

RSF (Rentable Square Footage) *

1

Notes

White Rhino

Internals

Edit

< 8955-102

Unit Overview

Meters

Unit Details

Name *

8955-102

Parent Property *

8951 Cypress Waters

RSF (Rentable Square Footage) *

1

Notes

White Rhino

Delete

Cancel

Submit

Internals

5

SECTION 5

Access Assigned Meters

View the meters assigned to a unit and check their assignment status.

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Q Name

Property

Unit Name	Property	Occupancy	RSF
8955-102	8951 Cypress Waters	White Rhino	1
GARAGE	9111 Cypress Waters	General Motors, LLC	10,000
NLA	8950 Cypress Waters	Pena Park	1
Suite 100	8951 Cypress Waters	Inventurus Knowledge Solutions (IKS)	10,000
Suite 100	3100 Olympus	Nokia of America Corp (LifeScience)	10,000

+ Add Unit

1

Click a unit row in the Units table to open the unit's details.

< 8955-102

Unassign

Assign New Meters

Unit Overview

Meters

Q Search by name

☐	Category	Unit	Meter Name ↑	Designation	Type
☐	Electricity	kWh	1527TMAJ0600	1527TMAJ0600	dedicated

Records per page: 10 1-1 of 1

Internals

2

Click the Meters tab to check assignments. If a meter is assigned, it will show in the table; if none are assigned, the table will show no meter records.

Assigning and Unassigning Meters

Use the unit's Meters tab to confirm assigned meters, add new meters, or remove existing ones.

1.1

Click **Unassign** after selecting a meter to unassign it.

1.2

Click **Assign New Meter** to begin assigning a new meter.

Are you sure you want to unassign these meters?

Cancel

OK

2.1

To confirm the removal of a meter, click **OK** on the confirmation screen.

2.2

Select the meter rows that should belong to the unit, then confirm the assignment.

Assign Meters To 8955-102

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SECTION 7

Accessing Internals

Turn on Internals to view system details for imports and troubleshooting.

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Garage

Unit Overview

Meters

Unit Details

Edit

Name *

GARAGE

Parent Property *

9111 Cypress Waters

RSF (Rentable Square Footage) *

10,000

Notes

Internals

```
1 {
2   "_id": 75,
3   "deleted": false,
4   "created": "2025-09-17T12:15:18.862000",
5   "cid": 3,
6   "uid": 0,
7   "notes": "",
8   "entity_id": "UNIT-00075",
9   "name": "GARAGE",
10  "area": 10000,
11  "lease": 0,
12  "parent": 7,
13  "parent_name": "9111 Cypress Waters",
14  "meters": []
15 }
```

1

Click a unit row to open the unit details page and go to **Unit Overview**.

2

Turn on the **Internals** toggle below Unit Details.

3

The **Internals** panel appears and shows fields like **entity_id**, which can be used for imports or troubleshooting.



Thank you

BUDGETING TRAINING COMPLETE

For additional support, please contact your
Entronix Finance administrator or support team.

✉ connect@entronix.io

Entronix Finance

Accurate data. Clear workflows. Better financial control.