

FilterSync Portfolio Rollout Plan



This guide outlines two practical strategies for implementing FilterSync across your rental portfolio, whether you're ready to go all-in or prefer a phased approach.

Option 1: Phased Rollout at Renewals & New Leases

This is the easiest option, best for property managers who want a lower-friction rollout while still protecting long-term maintenance. After 12-18 months your entire portfolio should be automated.

1

Start with renewals and new leases

Begin implementing FilterSync with all lease renewals and new leases going forward.

2

Add lease language

Add FilterSync lease language and introduce the system at signing.

3

Build gradually

Slowly build up your FilterSync active properties over time.

4

Monitor compliance

Use the dashboard to monitor compliance and identify problem-prone properties.

5

Optional segmentation

Segment tenants by maintenance history and onboard high-risk properties early.

Option 2: Full Portfolio Rollout

Best for property managers who want to quickly reduce HVAC-related work orders, enforce tenant compliance, and build instant owner confidence.

Export property data

Export your property list and tenant contact info into our upload template.

Set filter frequency

Use the global default filter change frequency (e.g., every 30, 60, 90 days) unless exceptions are needed.

Notify stakeholders

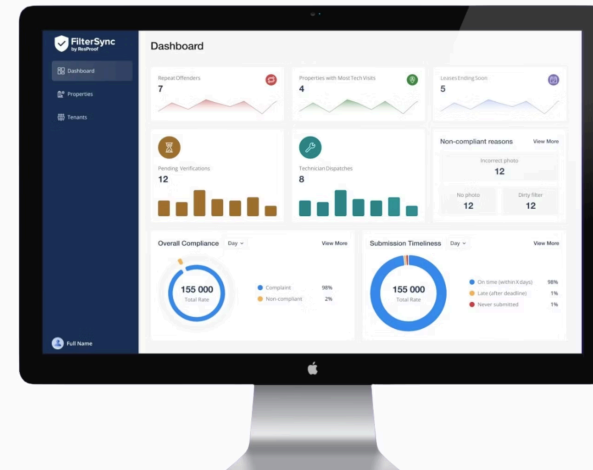
Use our onboarding templates to notify tenants and owners in advance.

Set launch date

Choose a date when reminders and submissions begin.

Monitor compliance

Monitor dashboard daily during the first cycle to confirm compliance and fine-tune settings.



The full portfolio approach allows for immediate implementation across all properties, creating a standardized maintenance schedule from day one.

Communication Tips

Use ready-made templates

Use our ready-to-send tenant welcome message.

Inform property owners

Notify owners that this is a preventative service to avoid HVAC damage and reduce liability.

Frame as value-add

Frame as a value-add to both parties, not a punishment. Lower utility bills, cleaner air, fewer repairs and less inconvenient technician visits, fast and easy submission with no app to download, eliminates the risk of maintenance charges for a neglected filter, don't have to try and remember as we do that for them.

Summary

Whether you roll out FilterSync to all properties at once or phase it in gradually, the system is designed to work seamlessly behind the scenes. The earlier you start, the sooner you reduce maintenance burdens and avoid preventable HVAC costs.



Choose Rollout Strategy

Select either the phased approach or full portfolio implementation based on your needs.



Communicate Clearly

Use our templates to inform tenants and owners about the new system.



Monitor & Optimize

Track compliance through the dashboard and make adjustments as needed.

