FilterSync
by ResProof

Property Manager Onboarding Guide

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Get Started

Welcome to FilterSync, Your Automated Solution for Tenant HVAC Compliance

This guide will walk you through the steps of setting up your FilterSync account and rolling out the system seamlessly. You'll quickly see how FilterSync saves you time, reduces HVAC-related issues, and improves communication with both tenants and property owners.

Set Compliance Schedules

Step 1: Add Properties to FilterSync
Get Started by Importing Your Portfolio
- Option 1: Bulk Upload
  Upload your property list via spreadsheet (recommended for portfolios). Include:
  - Property address
  - Lease start and end dates
  - Tenant contact info (especially mobile numbers)
- Option 2: Manual Entry
- Add properties one at a time if you prefer a more granular approach.

Tip: FilterSync charges only for properties that are activated, so you can import your entire portfolio and activate them as needed.

Step 2: Set Filter Change Schedules
Choose the Frequency That Works Best for You
- Default Frequency: Choose a default filter change frequency for all properties (e.g., every 30, 60, or 90 days).
- Custom Frequency: Customize filter schedules for individual properties if needed based on tenant needs or property requirements.

Tip: Set the default to streamline the process for most properties and adjust only where necessary.

Every Missed Filter Costs You Time and Owner Trust. Automate and verify compliance

Tenant compliance has always been the weakest link. FilterSync takes it out of their hands and puts it in yours.

Set Compliance Schedules

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Step 3: Enter Filter Sizes (Not required but recommended)
Keep Track of Filter Sizes for Your Records
- Add Filter Sizes: If available, enter each property's air filter size.
- Tenants Won't See This Info: Filter sizes are stored for your records and are used to ensure compliance, but tenants won't see or be required to enter this information.
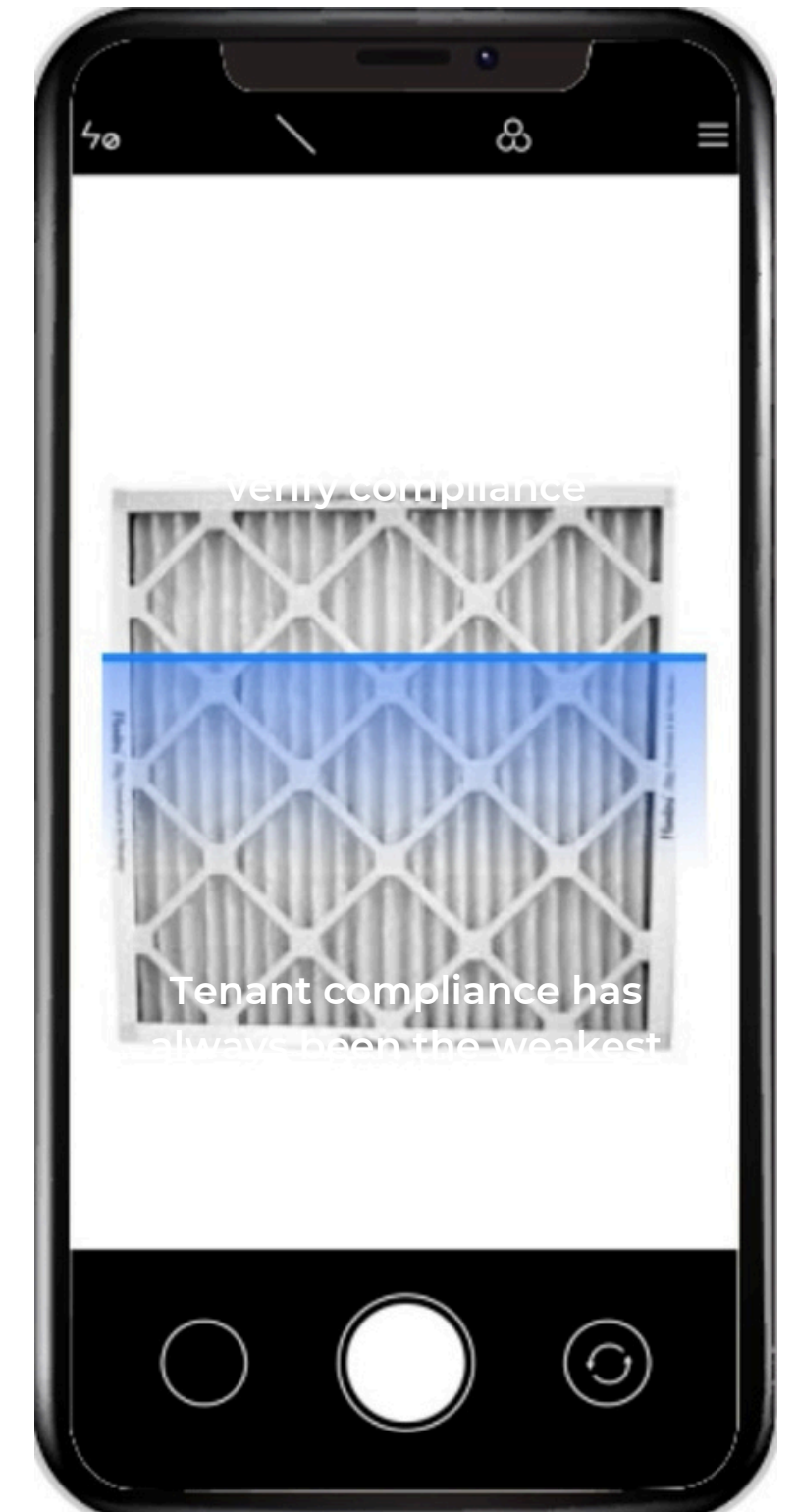
Tip: This step is useful for you as a reference but isn't required for tenant participation.

Step 4: Set Grace Period for Compliance
Define How Much Time Tenants Have to Comply
- Grace Period Settings: Choose how many days you want to allow tenants to submit their filter change photo before they receive a final notice.
- Final Message: After the grace period, tenants will receive a message notifying them that a technician will be dispatched at their expense.

Tip: A typical grace period ranges from 1 to 7 days depending on your preferences for compliance.

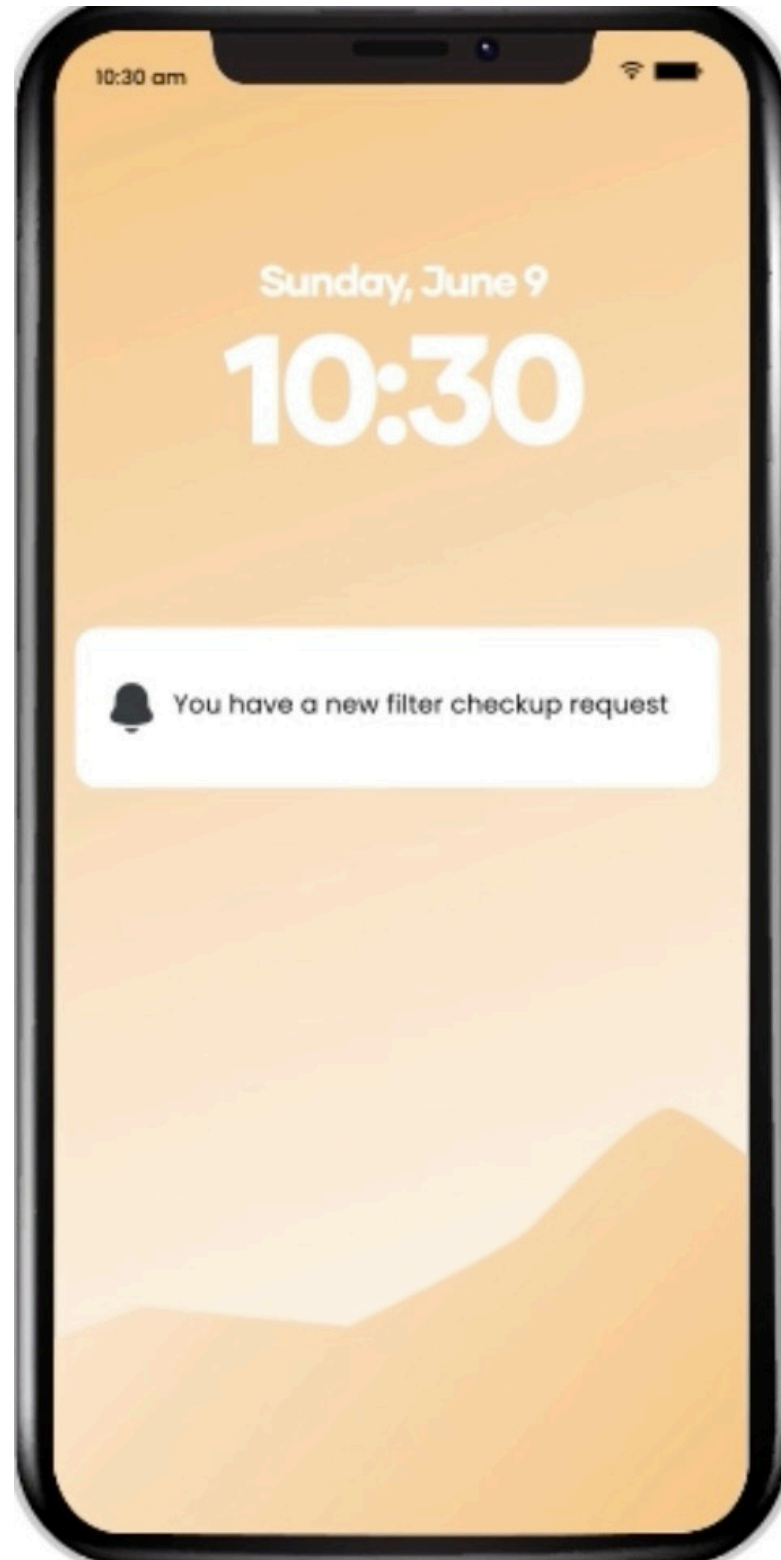**FilterSync**
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Launch

Step 5: Activate Properties

Activate Properties and Start Tenant Engagement

- Activate Each Property: Once a property is set up, activate it in FilterSync.
- Tenant Welcome Message: Upon activation, tenants will receive a welcome message, including an introductory explainer video and instructions for submitting photos.
  - New Managed Property: Tenant receives a request for a baseline image of the HVAC filter.
  - Turnover: During tenant turnover, set the property to initiate the verification process.

Tip: Use this step as an opportunity to educate tenants upfront and create a seamless experience.

You're Ready to Roll!

What FilterSync Automates

No More Manual Follow-Ups or Missed Compliance

- *SMS Reminders:* Sent to tenants before and on the filter change date, ensuring they're on track.
- *Real-Time Photo Submission:* Tenants submit photos through an auto-authenticated link, simplifying compliance.
- *AI Verification*: FilterSync scans tenant-submitted photos to ensure they're new, installed correctly, and match the submission date.
- *Daily Escalations:* Automatic follow-up reminders are sent to tenants during the grace period to ensure compliance.
- *Final Escalation:* A final notice informs tenants that a technician will be dispatched at their expense.
- *Instant Verification to Property Manager:* No manual review required, you get immediate verification once a tenant's filter change is confirmed.

The End of Tenant Compliance Worries

Now that you're familiar with FilterSync's setup and features, you're equipped to start automating tenant compliance for HVAC maintenance. By streamlining filter change verification, you'll save time, reduce HVAC-related repairs, and provide a seamless experience for tenants and owners alike.

Start your full portfolio rollout today and enjoy the benefits of reduced work orders, fewer disputes, and happier owners and tenants.