FilterSync

Property Manager User Guide

Version 1.0 · 2026

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Chapter 1

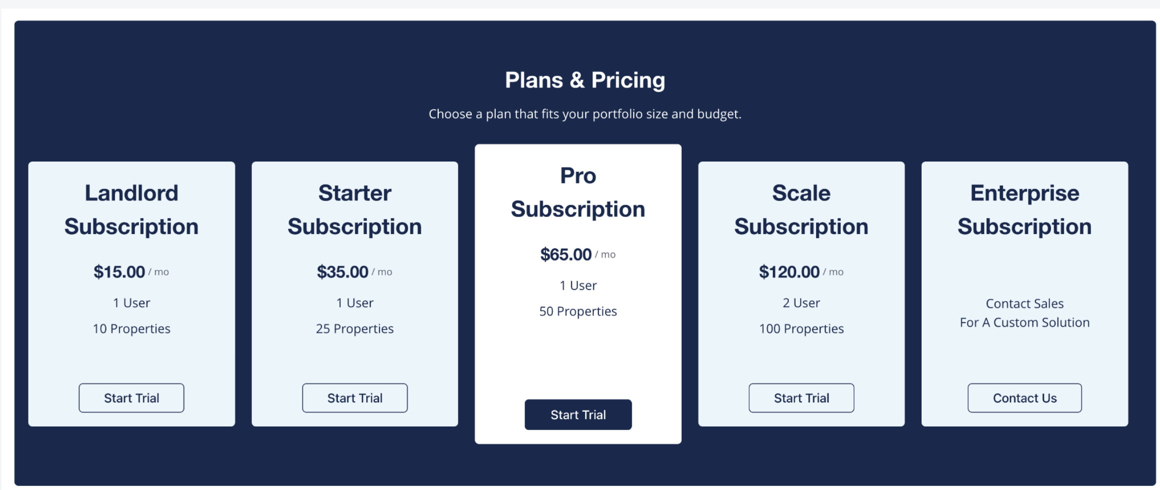
Getting Started

Subscriptions & Trial Period

1.1 Subscription Plans

FilterSync offers several plans depending on the size of your portfolio and the number of team members you need. Your plan controls how many properties you can manage and how many users can access your account.

Plan	Who It's For
Landlord	Best for individual landlords. Single user, basic property management.
Starter	For small managers. Single user with 25 property allowance.
Pro	For small managers. Single user with a larger property allowance.
Scale	For small teams. Supports up to 2 users on the same account.
Enterprise+	A tailored plan arranged directly with the FilterSync team.



Subscription Plans Block
https://resproof.com/

The plans overview screen where you choose or upgrade your plan

i If you try to add more properties or team members than your plan allows, the system will prompt you to upgrade. You can do this at any time from My Profile.

1.2 Trial Period

When you first register, you get a 14-day free trial. No payment details are needed to get started. The trial gives you full access to everything included in your chosen plan.

1	**Your trial begins** The 14-day countdown starts from the date you register to the system.
2	**Use the platform freely** Explore all features — add properties, assign tenants, review AI results, and more.
3	**Subscribe at any time** You can purchase a plan during the trial from My Profile. Once purchased, your subscription starts immediately.
4	**Trial ends after 14 days** If you haven't subscribed, most features are locked. You can still view your profile and choose a plan.
5	**Restore access** Go to My Profile, choose a plan, and complete payment to unlock everything again.

! If you hit a limit during your trial (for example, trying to add more properties than your plan allows), you'll be taken to the upgrade page. Upgrading during the trial ends it early and switches you to a paid plan.

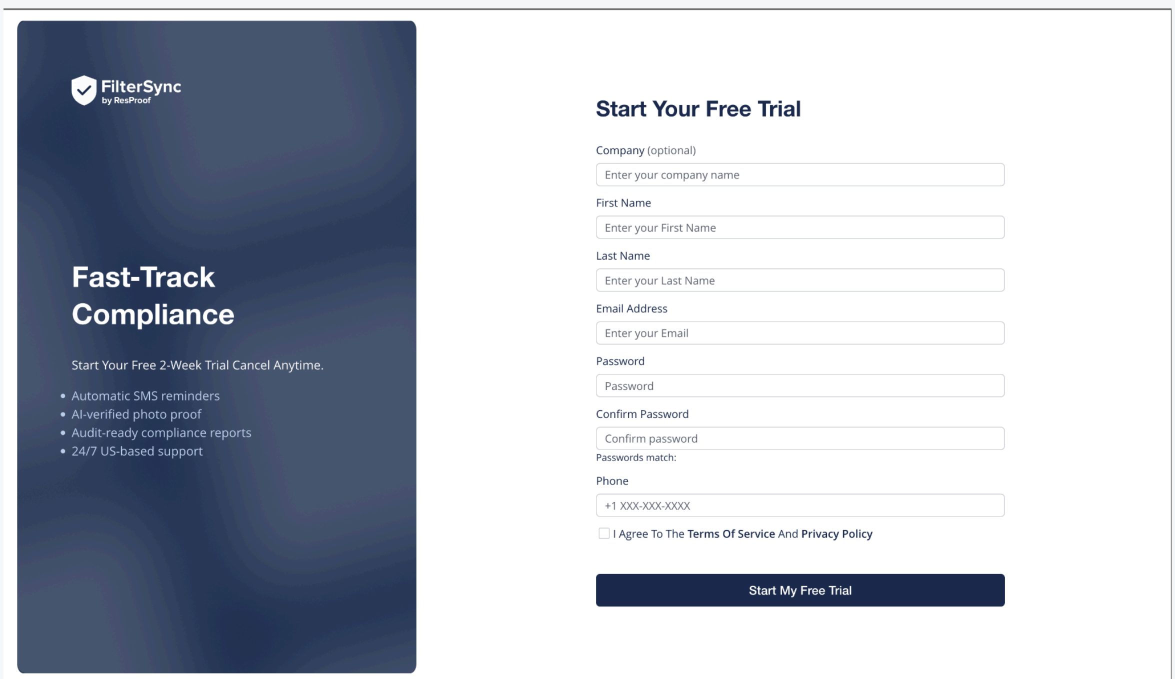
Chapter 2

Registration

Creating your account

Registration takes just a few minutes. You'll pick your plan and set up your account credentials on the same page.

1	**Go to the FilterSync homepage** Click Start Trial for selecting a subscription plan from the pricing block.
2	**Fill in your details** Complete the registration form. See the fields listed below.
3	**Click Next** The system checks your information. If everything is correct, you're taken to your Dashboard.



Registration Form

https://resproof.com/user/register?subscription=trial

The Create Your Account screen with all required fields

What you'll need to fill in:

Field	What to enter
Company Name	Required if you're on a Scale, Enterprise+, or Custom plan.
First & Last Name	Your full name. Required.
Phone Number	A valid 10-digit US phone number.
Email Address	This will be your login. Must be unique.
Password	At least 8 characters. You'll type it once to set it.

> i If you already have an account, don't register again — go back to the Login page and use the Forgot Password link to recover access.

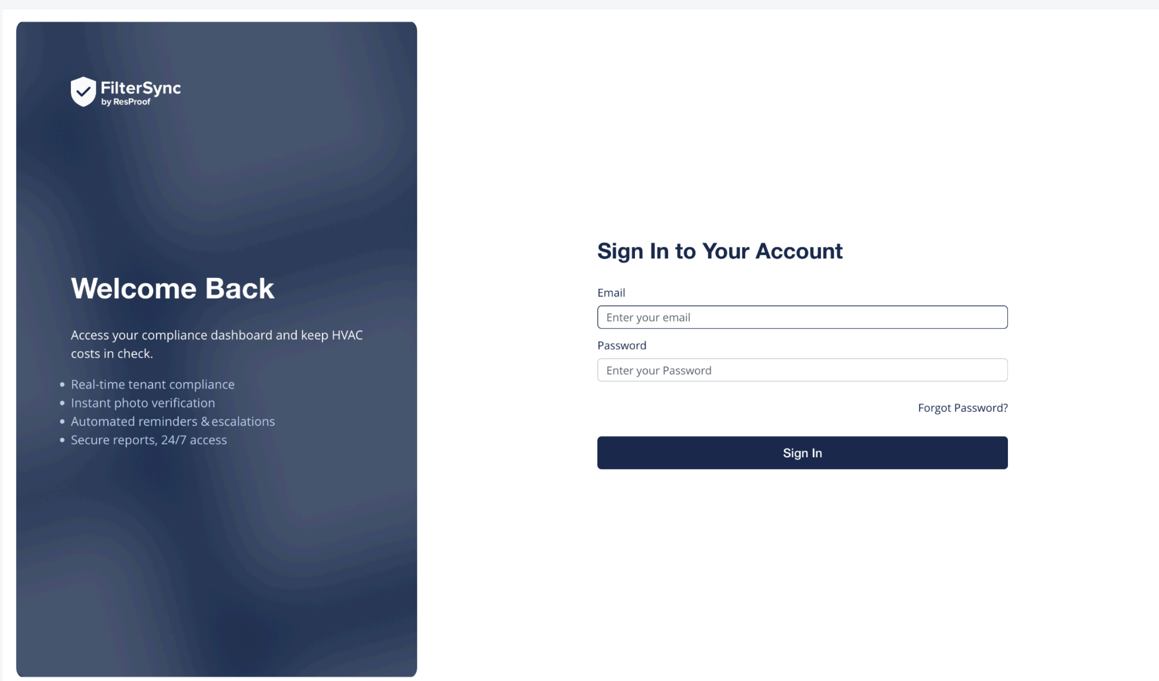
Chapter 3

Login & Logout

Accessing your account

3.1 Logging In

1	**Go to the FilterSync homepage** Click the Log In button at the top of the page.
2	**Enter your email and password** Use the credentials you created during registration.
3	**Click Log In** The system verifies your details.
4	**You're in** If your subscription is active, you land on the Dashboard. If your subscription has expired, you'll see a limited view with an option to renew.



Login Page

Email and password fields with the Log In button

3.2 Forgot Your Password?

1	**Click Forgot password** You'll find this link on the Login page, below the password field.
2	**Enter your email address** The system will send you a reset link.
3	**Check your email** Open the message and click the link inside. The link is valid for 48 hours.
4	**Set a new password** Enter and confirm your new password (at least 8 characters).

3.3 Logging Out

Click the Log Out button. You'll find it on the dashboard page in the left bottom corner. You'll be returned to the public homepage.

Chapter 4

Dashboard

Your portfolio at a glance

The Dashboard is the first screen you see after logging in. It shows a live summary of your entire portfolio's filter compliance, tenant activity, and maintenance status — all in one place.

Dashboard Overview

Full dashboard with all metric cards and charts visible

i Clicking on any number or chart on the Dashboard takes you directly to the Properties list, already filtered to show the relevant properties.

4.1 What Each Metric Shows

Metric	What it tells you
Overall Compliance Rate	A pie chart showing the share of tenants who passed the filter check (Compliant) vs. those who didn't submit or failed (Non-Compliant).
Pending Verifications	The number of filter photos currently waiting to be reviewed by the system.
Non-Compliant Reasons	A breakdown of why tenants are non-compliant: dirty filter, no photo submitted, or incorrect photo.
Technician Dispatches	How many properties currently have a technician visit scheduled.
Submission Timeliness	Shows whether tenants submitted their filter photos on time, late, or not at all.
Repeat Offenders	Tenants who have failed the filter check two or more times.
Most Technician Visits	Which properties have needed the most technician callouts.
Leases Ending Soon	Tenants whose lease ends within the next 30 days.

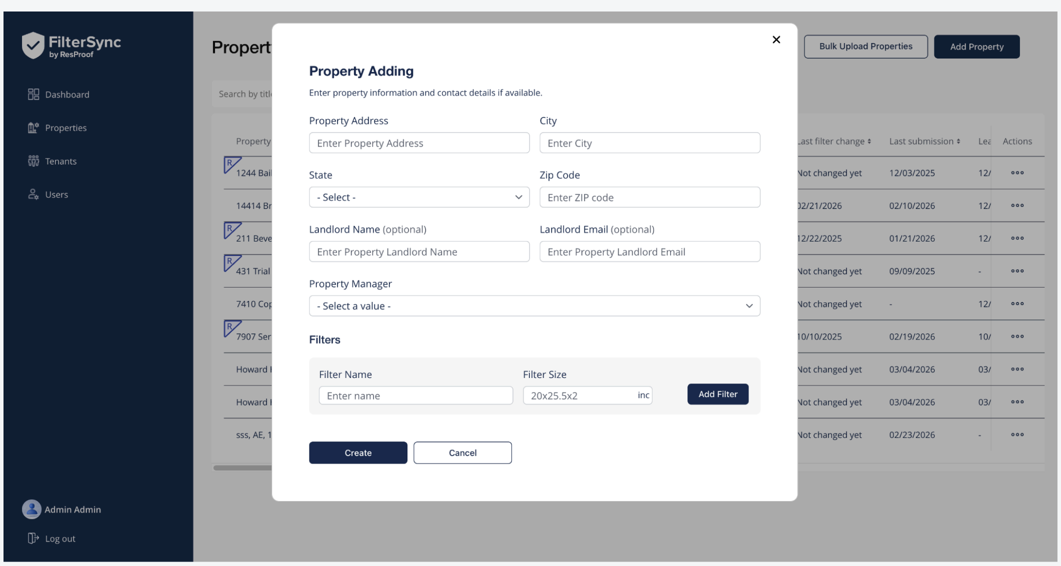
Chapter 5

Managing Properties

Add, edit, configure and track your properties

5.1 Adding a Single Property

1	**Go to Properties** Click Properties in the main navigation.
2	**Click Add New Property** A popup form opens.
3	**Enter the property address** Fill in the street address, city, state, and ZIP code.
4	**Add landlord details (optional)** If you want to notify the landlord about filter changes, enter their name and email.
5	**Assign a responsible manager** On multi-user accounts, choose which team member manages this property.
6	**Add filter information** On multi-filter property, add filter name and filter size.
7	**Click Create** The property is created and you're taken to its individual page.



Add New Property Popup

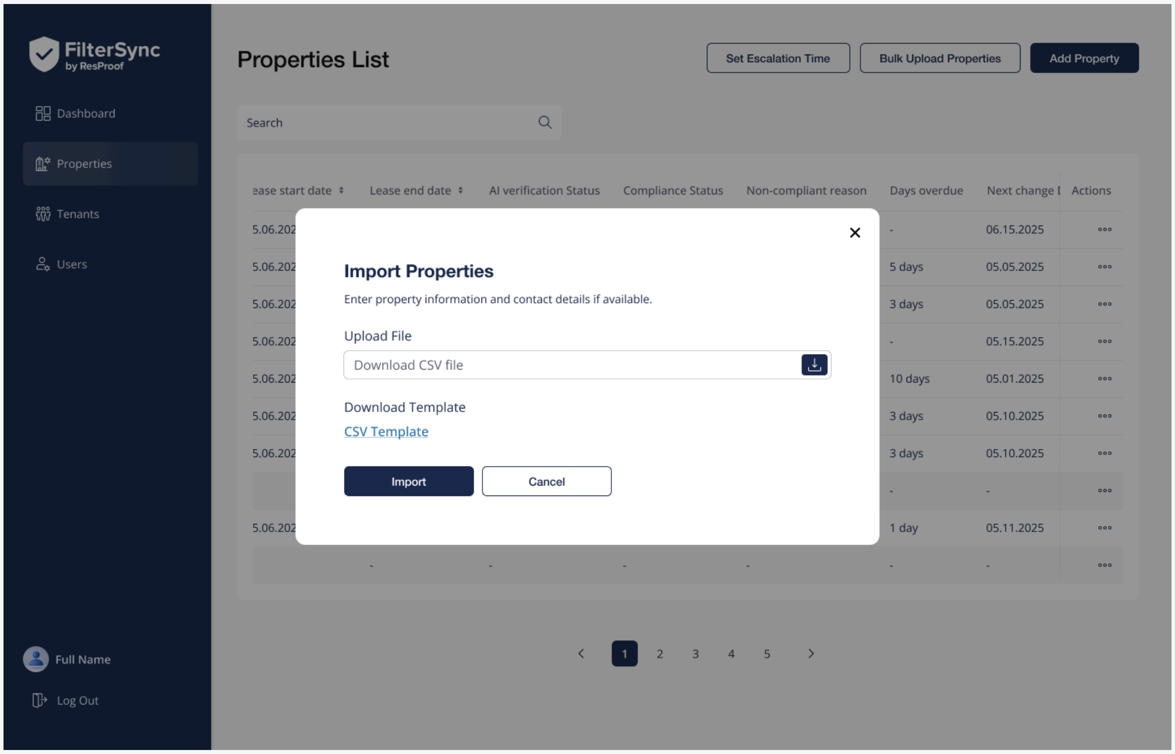
The property creation form with address, city, state, ZIP and optional landlord fields

! If you've reached your plan's property limit, you'll see a message with two options: upgrade your plan, or deactivate an existing property to free up a slot.

5.2 Adding Multiple Properties at Once (Bulk Upload)

If you have many properties to add, use the Bulk Upload feature to import them all from a spreadsheet file (CSV).

1	**Go to Properties** Click Properties in the navigation.
2	**Click Bulk Upload Properties** A popup opens with instructions.
3	**Download the template** Click the Download Template link to get a pre-formatted spreadsheet.
4	**Fill in your properties** Open the file and add one property per row. Required columns: Address, City, State, ZIP Code.
5	**Upload your file** Back in the popup, upload your completed CSV file.
6	**Click Import** The system checks each row. Errors are shown with row number and field name so you can fix and re-upload.
7	**Done** Successfully imported properties appear in your list immediately with Inactive status. And you should activate each property manually



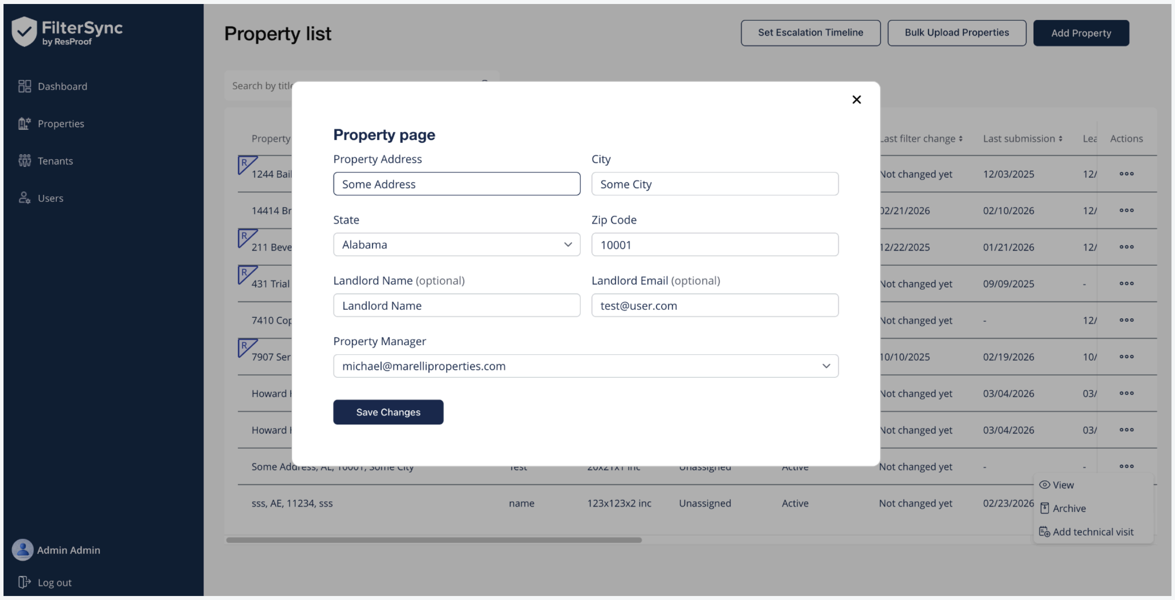
Bulk Upload Popup

The Import Properties popup showing the upload area and Download Template link

> i If a property in your file already exists in the system with identical details, that row is automatically skipped — no duplicates are created.

5.3 Editing a Property

1	**Open the property** Go to Properties and click on dots in the Action column for the property you want to edit.
2	**Click View** The editing form opens with the current information already filled in.
3	**Make your changes** Update any fields, including the property status.
4	**Click Save** Your changes are saved and you're returned to the property page.

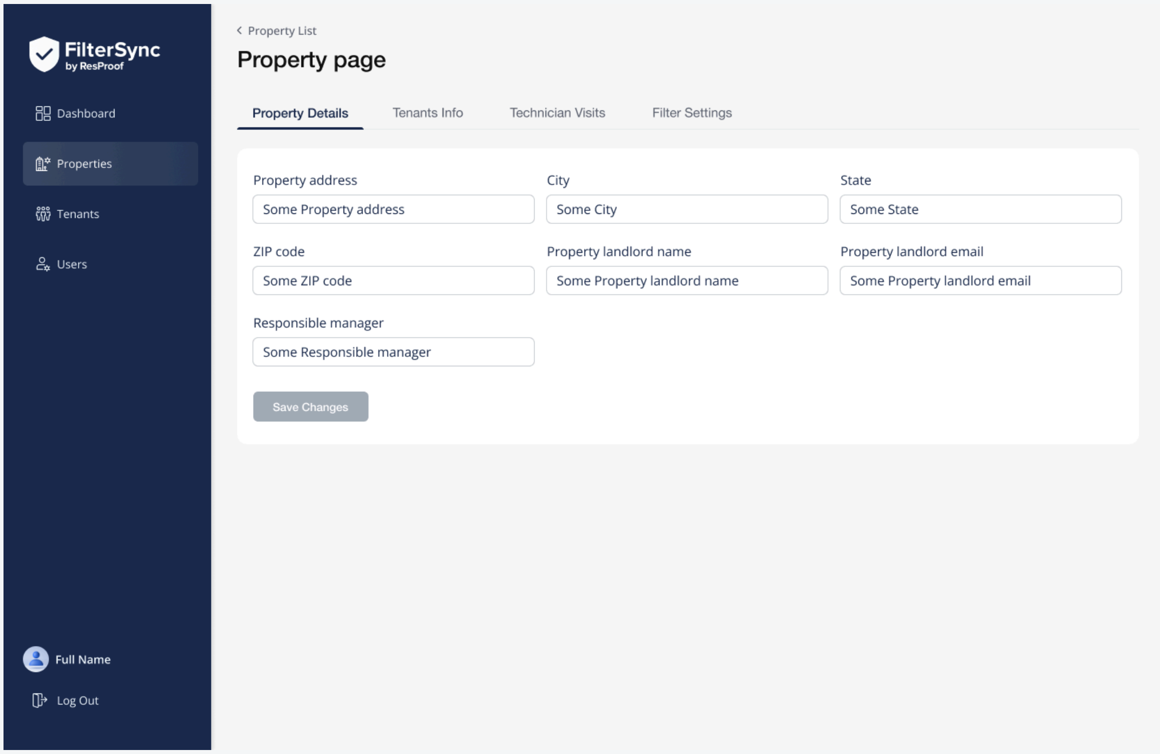


Edit Property Popup

The property editing form with all fields pre-filled and the Update button

5.4 The Individual Property Page

Each property has its own page where you can see and manage everything related to it.



Individual Property Page

Full property page showing details, tenants table, technician visits and filter settings tabs

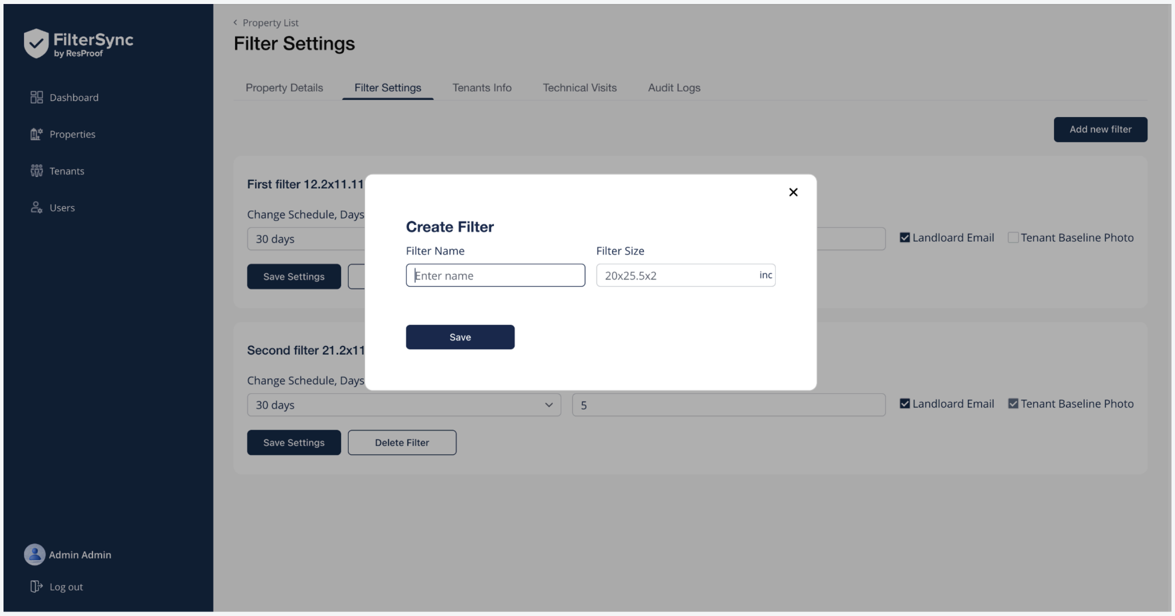
Section	What you can do
Property Details	The address, landlord info, and assigned manager. Click Edit to update.
Tenants	List of all assigned tenants and their lease dates. Use Add Tenant to assign someone new.
Technician Visits	History of all maintenance visits. Use Add Technician Visit to log a new one.
Filter Settings	Set how often filter checkups happen (every 30-180 days) and how long tenants have to respond.
Audit Log	A read-only record of all AI verification events for this property.
Landlord Email Toggle	Turn automated landlord notification emails on or off for this property.

5.5 Adding & Configuring Filters

Each property can have multiple filters — for example, one for the bedroom and one for the kitchen. Each filter has its own name, size, and independent checkup cycle.

1	**Open the property page** Navigate to the property you want to configure.
2	**Go to Filter Settings** Find the filter configuration section on the property page.
3	**Click Add Filter** A form opens for the new filter.
4	**Enter the filter name** For example: Bedroom, Kitchen, or HVAC Unit.
5	**Enter the filter size** For example: 20x25x1 inc or 16x20x1 inc.
6	**Save** The filter is created and its checkup cycle begins once a tenant is assigned.
7	**Set the escalation time and Change Schedule** Choose how many days a tenant has to respond before a technician is dispatched for this filter.
8	**Save Settings**

Baseline photo checkbox is required in this case. Tenant gets the sms with a link to upload baseline photos for future checkups. This is used as the reference for all future AI checks.



Add Filter Form

The filter creation form showing name, size, baseline photo upload and escalation time fields

! Each filter must have a unique name and size combination within the same property. The baseline photo cannot be skipped — without it, AI verification cannot run.

Chapter 6

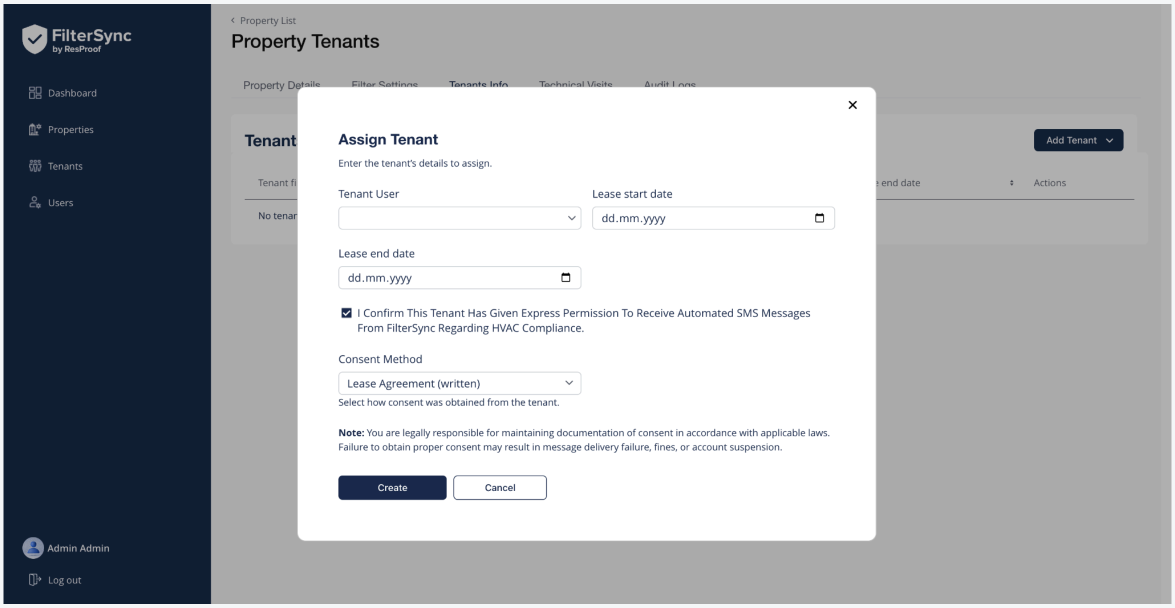
Managing Tenants

Assign tenants and manage lease periods

6.1 Assigning an existing Tenant to a Property

A property only starts the filter checkup process once a tenant is assigned. Here's how to do it:

1	**Open the property page** Navigate to the property you want to assign a tenant to.
2	**Click Add Tenant** The Assign Tenant popup opens.
3	**Choose Option** Select from tenants
4	**Search for the tenant** For Select from Tenants option, start typing the tenant's name in the search field. Select them from the dropdown if they already exist in the system.
5	**Set the lease dates** Enter the lease start date and lease end date. The end date must be after the start date.
6	**Confirm This Tenant Has Given Express Permission To Receive Automated SMS Messages** Choose Consent Method in the dropdown list
7	**Click Save** The tenant is assigned. The filter checkup cycle begins automatically on the lease start date.



Assign Tenant Popup

The Assign Tenant popup showing the tenant search field and lease date pickers

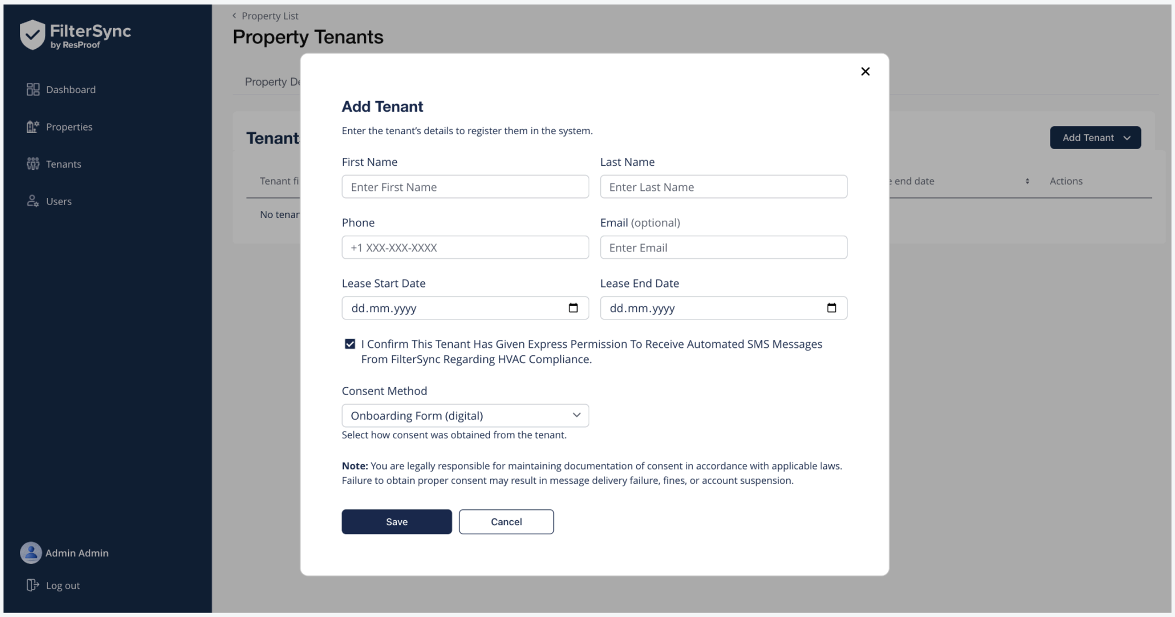
! The system checks that both the tenant and the property are available for the dates you choose. If either has an active lease for that period, you'll see an error and will need to adjust the dates.

6.2 Assigning a new Tenant to a Property

Here's how to do it:

1	**Open the property page** Navigate to the property you want to assign a tenant to.
2	**Click Add Tenant** The Assign Tenant popup opens.
3	**Choose Option** Create Tenant
4	**Fill form** Fill in the tenant's last and first name, phone, email.
5	**Set the lease dates** Enter the lease start date and lease end date. The end date must be after the start date.

6	**Confirm This Tenant Has Given Express Permission To Receive Automated SMS Messages** Choose Consent Method in the dropdown list
7	**Click Save** The tenant is assigned. The filter checkup cycle begins automatically on the lease start date.



Assign New Tenant Popup

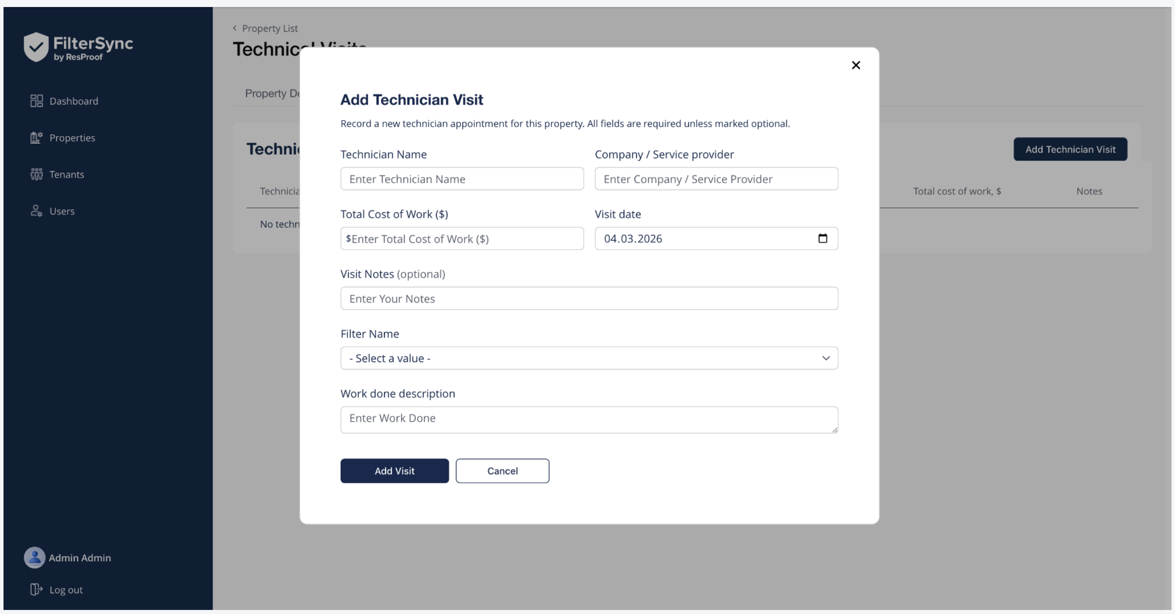
The Add Tenant popup showing the tenant create fields and lease date pickers

6.3 What Happens After a Tenant is Assigned

Situation	What the system does
First-ever tenant on this property	The tenant receives a welcome SMS with a link to submit a baseline photo of the filter. This photo is used as the reference for all future checks.
Returning tenant / immediate replacement	If the new tenant moves in right after the previous one with no gap, the checkup cycle continues at the same pace — no restart needed.
New tenant after a vacancy period	The cycle restarts. The first checkup interval is shortened to half the usual schedule so the new filter condition is verified sooner.
Lease expires	The system automatically flags the property as needing a new tenant. The previous tenant's history is saved.

6.4 Recording a Technician Visit

1	**Open the property page** Go to the property where the visit took place.
2	**Click Add Technician Visit** A form opens.
3	**Fill in the visit details** Enter the technician's name, company, visit date, and description of work. You can also add the cost and notes.
4	**Click Create** The visit is saved and appears in the Technician Visits history on this property.



Technician Visit Popup

The Add Technician Visit form with all fields

Chapter 7

Escalations & Notifications

SMS alerts, AI review, and landlord emails

7.1 How SMS Notifications Work

FilterSync automatically sends SMS messages to your tenants throughout the filter checkup process. You don't need to send these manually — they are triggered by the system based on dates and filter results.

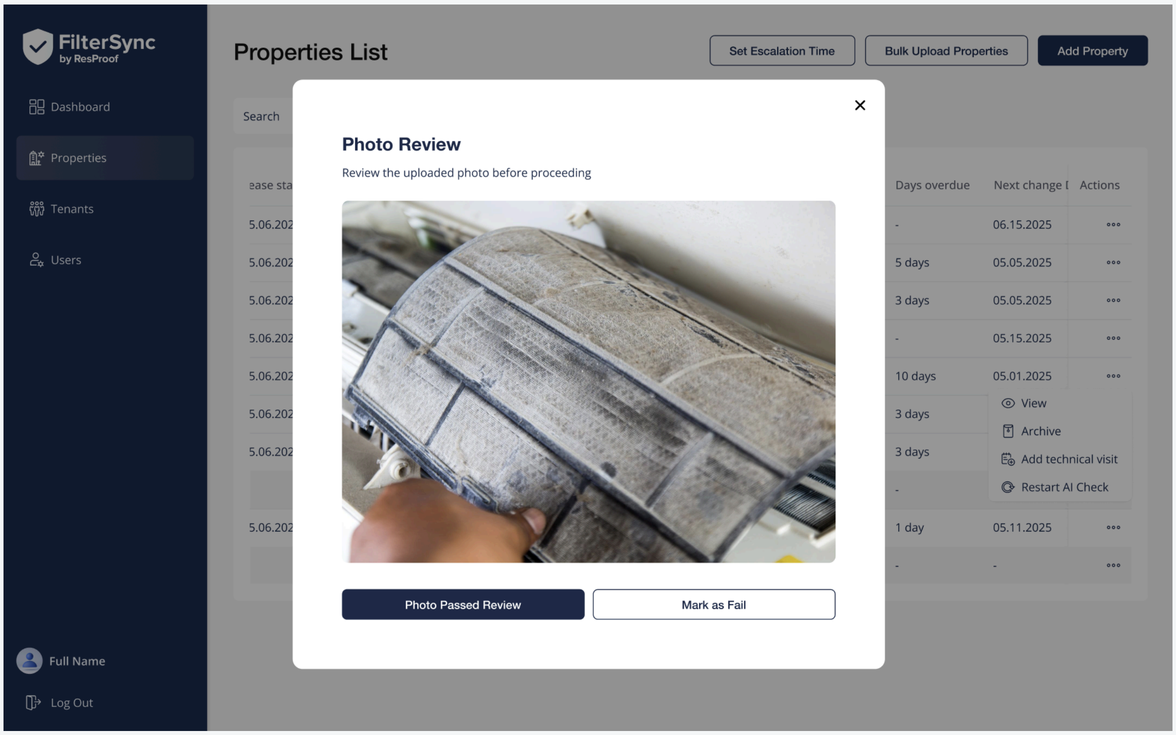
Message Type	When it's sent and what it says
Welcome message	Sent on the tenant's lease start date. Introduces them to the process and asks them to submit a baseline filter photo via a unique link.
Checkup reminder	Sent on the scheduled checkup date. Asks the tenant to photograph and submit their filter.
Follow-up reminder	Sent if the tenant hasn't submitted a photo. Warns that a technician visit may be arranged.
Escalation notice	Sent when the escalation period ends with no photo. Informs the tenant a technician has been dispatched.
Filter clean confirmation	Sent when the AI confirms the filter is clean. Includes the next checkup date.
Filter dirty notice	Sent when the AI finds the filter dirty. Asks the tenant to replace it and re-submit.
Photo issue notice	Sent when the photo can't be verified (e.g., poor lighting). Asks the tenant to try again.

7.2 Reviewing a Failed AI Verification (Escalated to PM)

If the AI fails to verify a filter photo twice in a row, the case is escalated to you for a manual decision. The property's AI verification status changes to Escalated to PM.
For any type of escalation, the property manager receives an email notification about the incident.

1	**Find the escalation** Go to the Properties list. Look for any property showing Escalated to PM in the AI Verification Status column or .
2	**Click the status** A popup opens showing the tenant's submitted photo and the AI's recommendation.
3	**Review the photo** Look at the filter photo carefully. You can download it for a closer look.
4	**Approve** Click Failed if you agree with the AI. The filter is confirmed as failed and a technician visit will be scheduled.

5	**Reject** Click Passed if you disagree. The filter is marked as Passed and the next checkup cycle is recalculated.



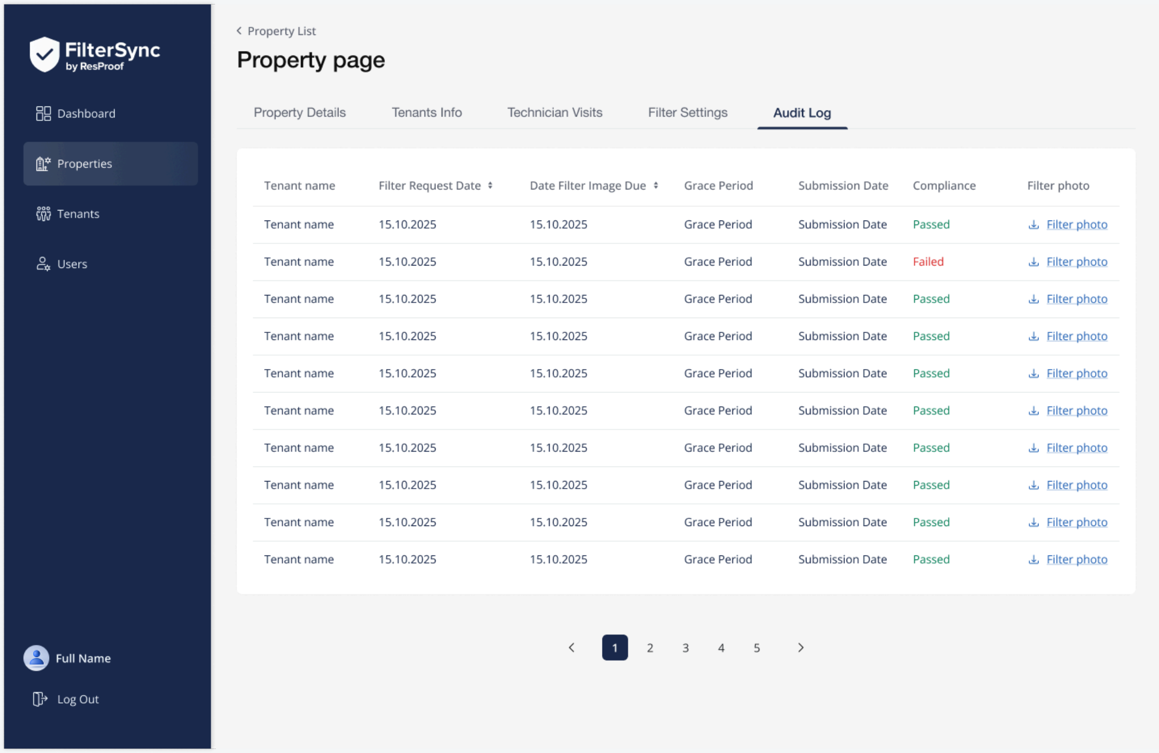
Escalated to PM Popup

The review popup showing the submitted filter photo and the Passed/ Failed buttons

> ! Don't delay reviewing escalated cases — the longer you wait, the longer the tenant is left without a resolution.

7.3 Reading the Audit Log

Every property has an Audit Log tab on its page. This is a read-only history of all AI verification events that were escalated to you.



Audit Log Tab

The Audit Log tab showing date, tenant name, filter photo, and status columns

The log shows:

- The date of each AI verification attempt
- The tenant's name
- The submitted filter photo (downloadable)
- The final status: Passed, Failed, or Escalated to PM

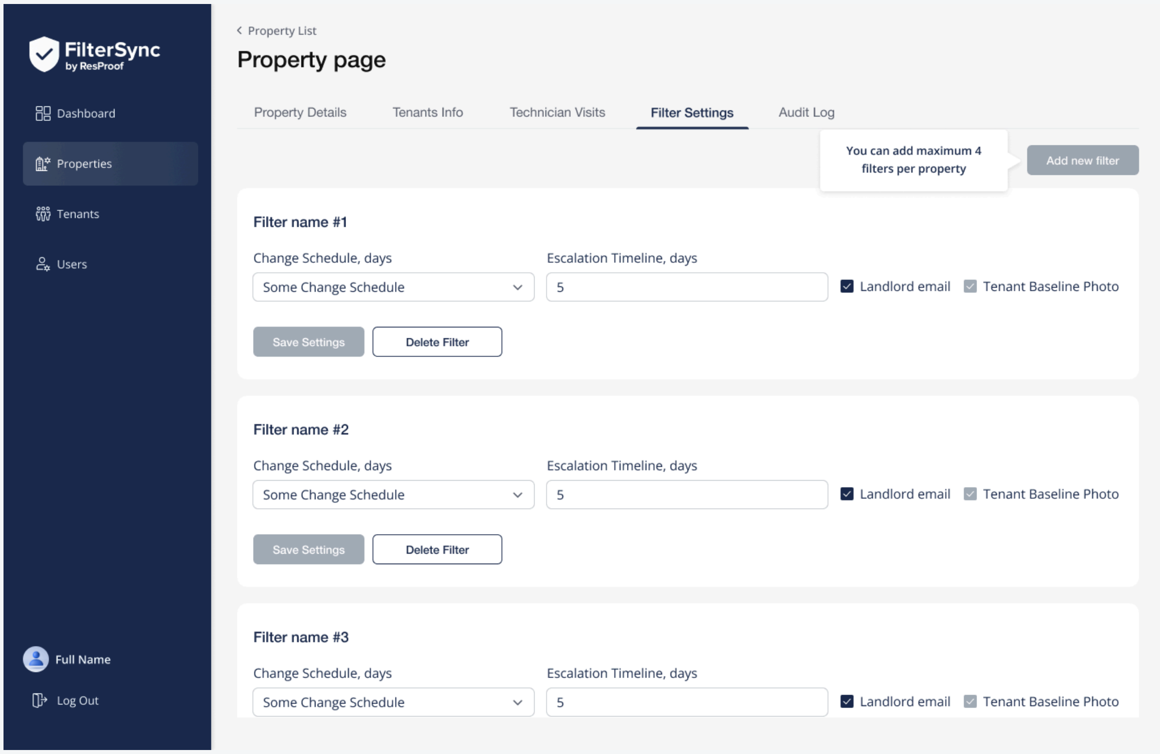
Entries are sorted newest first.

7.4 Landlord Email Notifications

When a tenant's filter is verified as clean, FilterSync can automatically send an email to the landlord confirming the completed filter change.

1	**Turn on globally** Go to the property settings and enable the landlord emails checkbox. This applies to property where landlord contact details are saved.
2	**Turn off for a specific property**

Open the individual property page and uncheck the Landlord Email checkbox. This disables emails for that property's landlord only.



Landlord Email Toggle

The Landlord Email checkbox on the individual property page

i Landlord emails are only sent if the landlord's email address is saved on the property. Make sure to add it when creating or editing a property.

Chapter 8

Team Management

Invite and manage your property manager team

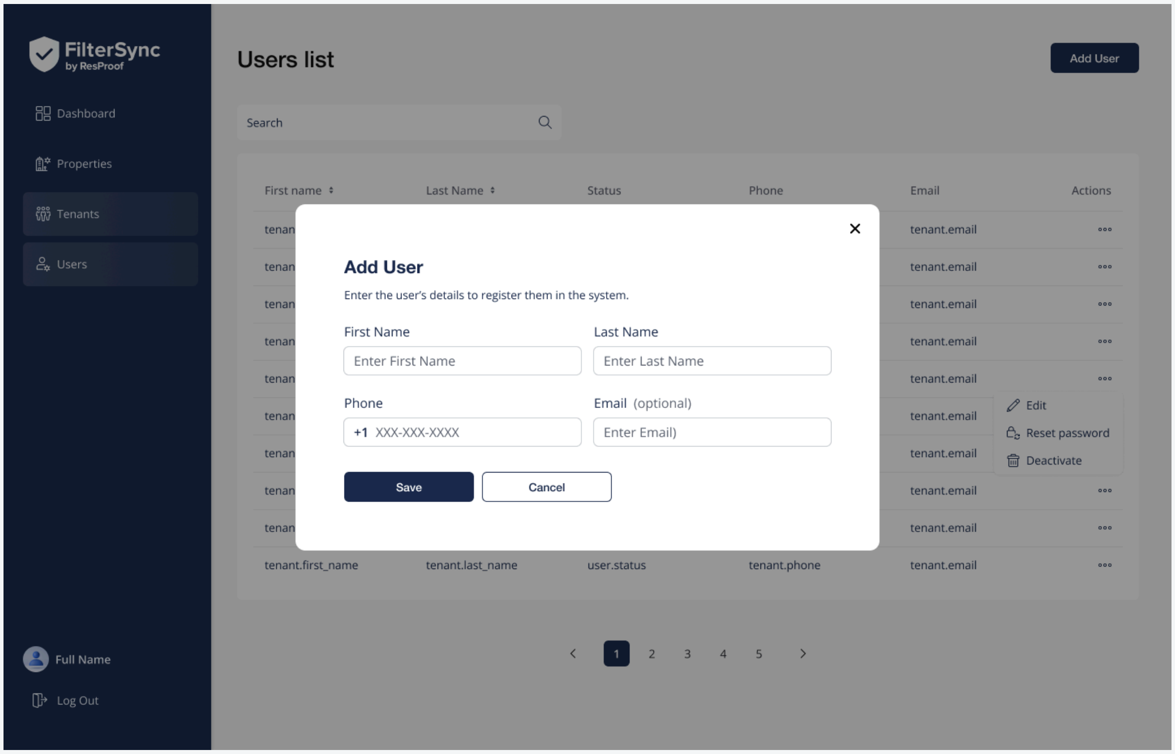
Multi-user team management is available on Scale and Enterprise+ plans. Only the Account Admin can add, edit, or deactivate team members.

8.1 Understanding User Roles

Role	What they can do
Account Admin	Full access to everything, including team management and subscription changes. There is one Admin per account — the person who registered.
Property Manager	Can do everything an Admin can for day-to-day property work. Cannot manage team members or change the account subscription.

8.2 Inviting a New Team Member

1	**Go to Users** Find it in the main navigation. Visible to Account Admins only.
2	**Click Add User** The Add User form opens.
3	**Enter their details** Fill in their first name, last name, email address, and phone number.
4	**Click Save** The new team member receives an email with a link to set their own password. The link is valid for 48 hours.



Add User Popup

The Add User form with first name, last name, phone, and email fields

! If you've reached the user limit for your plan, the Add User button won't be available. Upgrade to Enterprise+ for unlimited team members.

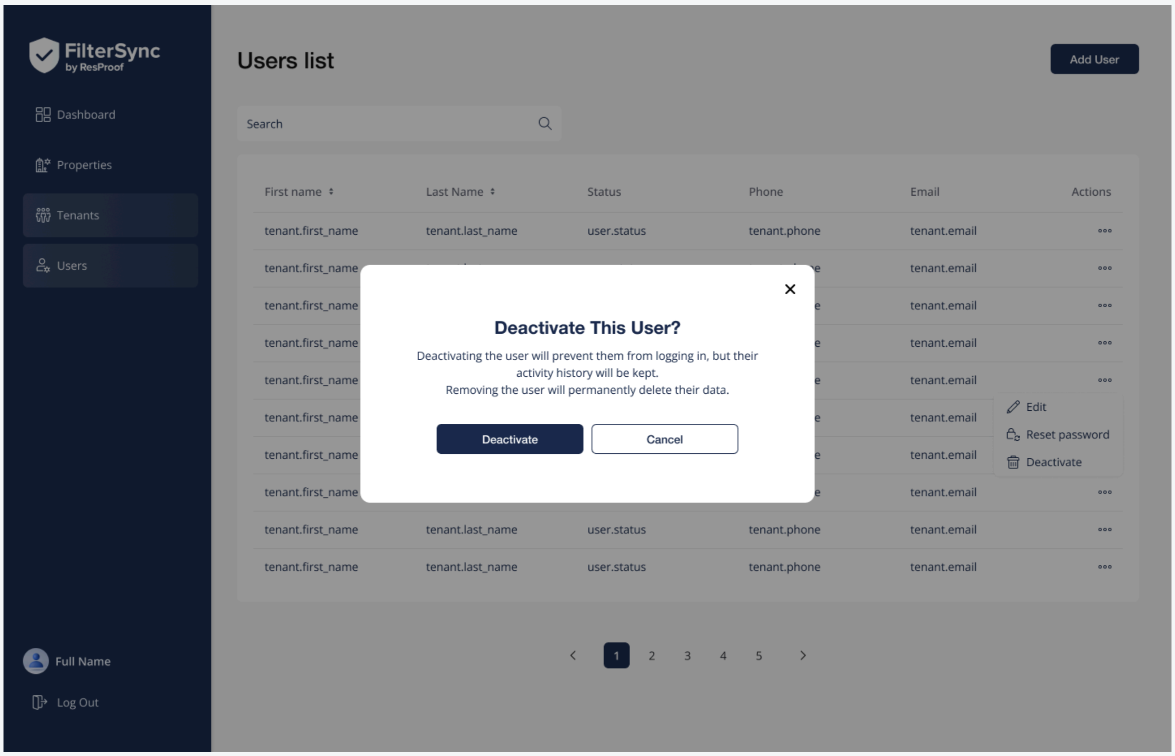
8.3 Editing a Team Member's Details

1	**Go to Users** You'll see a list of all team members.
2	**Click Edit next to the user** The edit form opens with their current details pre-filled.
3	**Make your changes** Update their name, email, or phone number as needed.
4	**Click Save** Changes are saved immediately.

8.4 Deactivating a Team Member

If someone leaves the team, deactivate their account rather than deleting it. This preserves their activity history while preventing them from logging in.

1	**Go to Users** Find the user in the list.
2	**Click Deactivate** The user's account is immediately disabled. They cannot log in but their history is kept.



Users List

The Users Management list showing team members with Edit, Reset Password and Deactivate buttons

8.5 Resetting a Team Member's Password

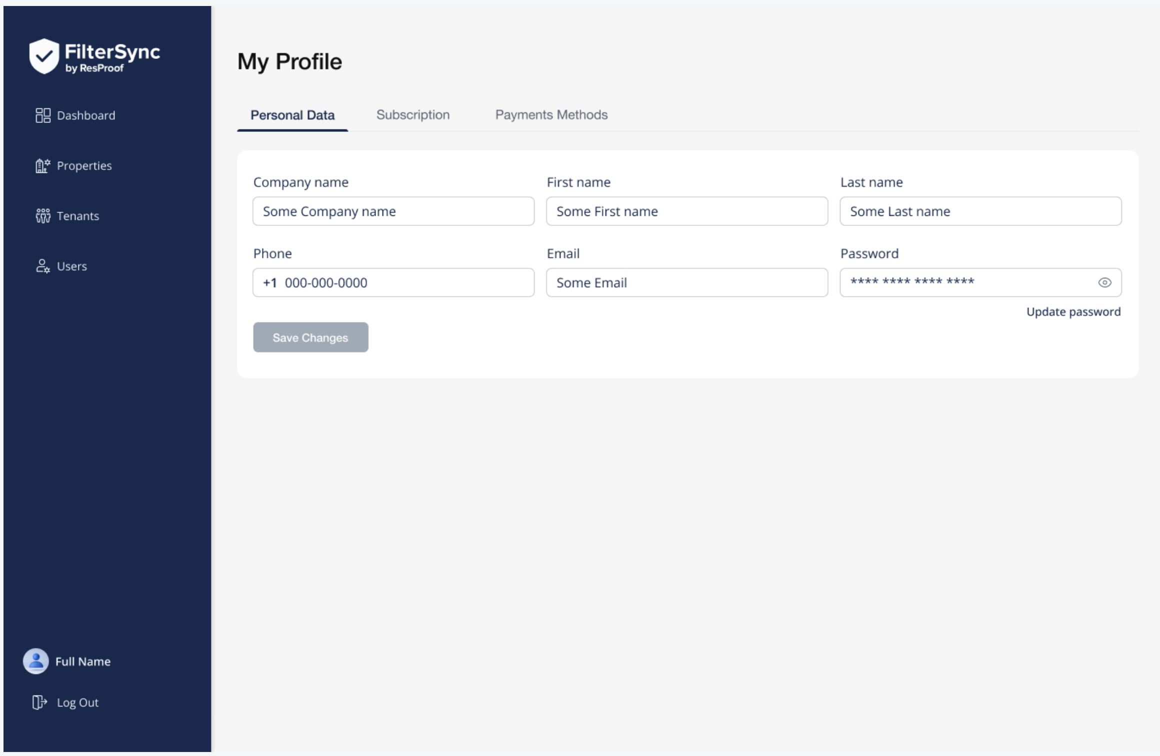
1	**Go to Users Management** Find the user in the list.
2	**Click Reset Password** The system sends them an email with a secure link to set a new password.

Chapter 9

My Profile & Subscription

Personal settings, billing and plan management

Access your profile by clicking on your Username in the navigation menu. Here you can update your personal details, manage your subscription, and handle payment methods.



My Profile Page

The full My Profile page showing personal data, subscription block and payment methods

9.1 Editing Your Profile

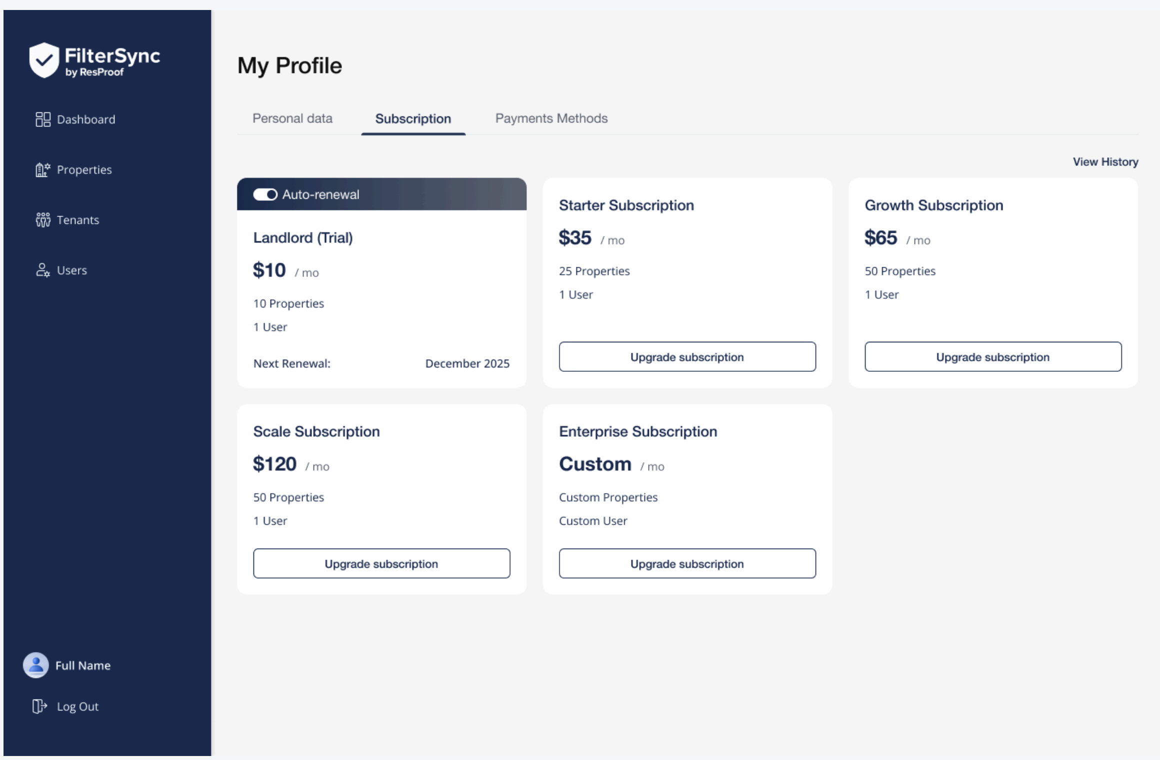
1	**Go to My Profile** Click My Profile in the navigation.
2	**Update your information** Change your company name, first name, last name, phone, or email.
3	**Click Save** Your profile is updated immediately.

9.2 Changing Your Password

1	**Go to My Profile** Click My Profile in the navigation.
2	**Click Update Password** A password change form opens.
3	**Enter your new password** At least 8 characters, including at least one number and one symbol.
4	**Confirm the password** Type it again in the confirmation field.
5	**Click Update** Your password is changed. Use it the next time you log in.

9.3 Managing Your Subscription

Your active plan is shown in the Subscription section on My Profile. You can see your plan name, the next renewal date, and control auto-renewal.



Subscription Tab on My Profile

The Subscription section showing active plan name auto-renewal toggle

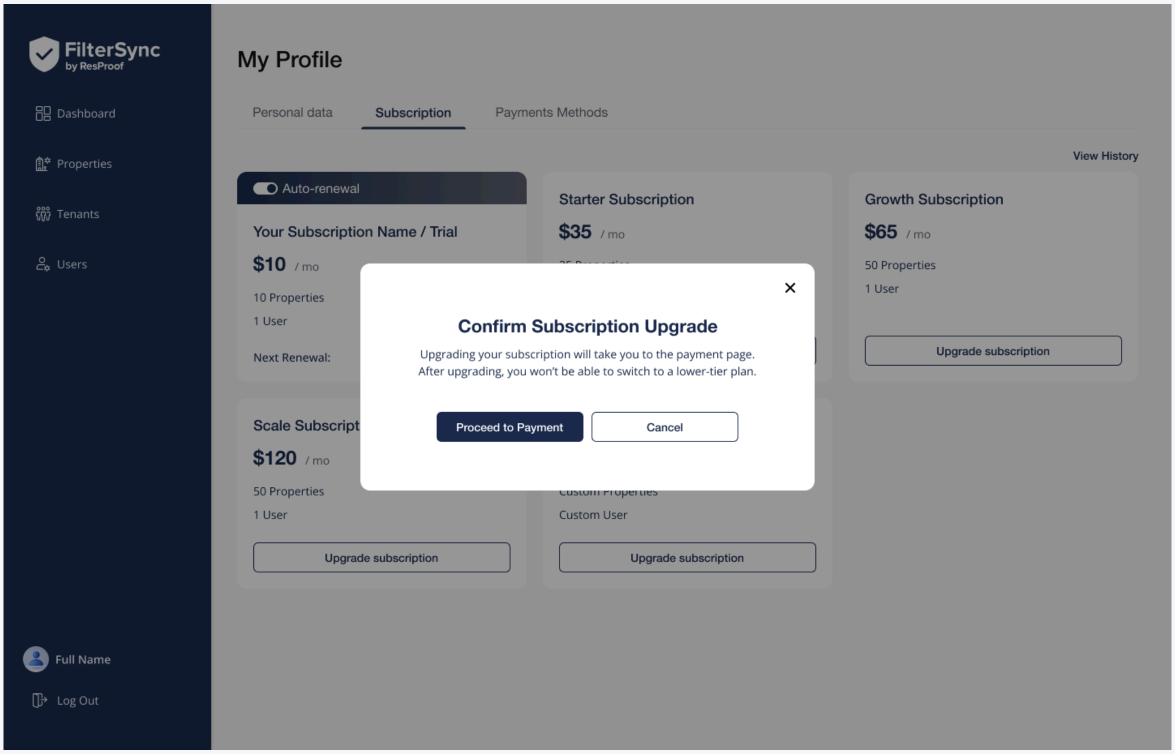
Turning off auto-renewal:

Toggle the auto-renewal switch to Off. Your subscription stays active until the current period ends, but won't renew automatically. After it expires, you can choose a new plan to reactivate.

> i Only the Account Admin can cancel a subscription outright. As a user, you can only turn off auto-renewal.

9.4 Upgrading Your Plan

1	**Go to My Profile, Subscription** Scroll to the Subscription section.
2	**Click Upgrade Subscription** A list of available higher-tier plans is shown. You can only upgrade — downgrades are not available.
3	**Select the new plan** Choose the plan that fits your needs.
4	**Review the discounted price** If you're upgrading mid-cycle, you'll see the final discounted price before you confirm.
5	**Confirm and pay** Complete the checkout. Your new plan is activated immediately.

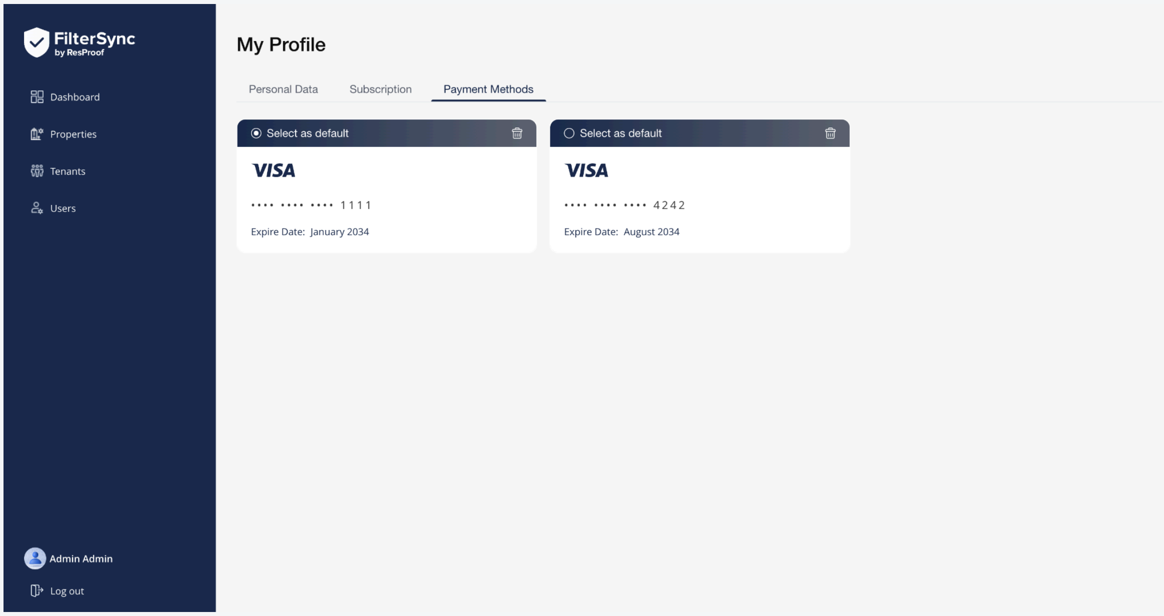


Plan Upgrade Screen

> i You'll always see the final price clearly before confirming an upgrade. The discount reflects the unused days remaining in your current billing period.

9.5 Managing Payment Methods

1	**Go to My Profile** Go to the Payment Methods tab.
2	**Set a primary card** Use the radio button next to each card to choose which one is charged first for renewals.
3	**Remove a card** Click Delete next to a card you want to remove. You must always keep at least one payment method. You cannot remove the primary card.



Payment Methods Section

The Payment Methods block showing saved cards with Primary radio button and Delete button

> ! Refunds are not automatic. If you believe you are owed a refund, please contact the FylterSync support team or your account administrator.

Need Help?

If you have any questions or need support, please contact your Account Admin or reach out to the FilterSync support team directly.

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