PROPERTY MANAGEMENT · MAINTENANCE OPERATIONS

Maintenance request intake and dispatch

Automates maintenance request intake from tenants, validates and prioritizes requests, dispatches to appropriate vendors, and tracks completion status. Reduces response time and ensures no maintenance issues fall through the cracks.

01 WORKFLOW TRIGGER

Tenant submits maintenance request through tenant portal or property management system

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow connects the tenant portal in AppFolio or Buildium to your pre-approved vendor list and, where used, Yardi for work order accounting and TenantCloud for tenant messaging. Automation handles intake capture, categorization, vendor selection, notification, and invoice matching. Property managers retain authority over emergency calls, tenant chargebacks, vendor assignment overrides, and any invoice above the standing approval threshold.

01

OUTPUTS

Closed work order with photos, Updated unit maintenance history, Vendor scorecard entries, Tenant satisfaction responses

02

SUCCESS MEASURES

Average first response time, Maintenance cost per unit monthly, Vendor performance rating, Tenant satisfaction score

03

CORE SYSTEMS

AppFolio, Buildium, Yardi, TenantCloud

HOW TO USE THIS BLUEPRINT

Property managers: confirm the emergency criteria and chargeback rules in stage 3 match your lease language before go-live.

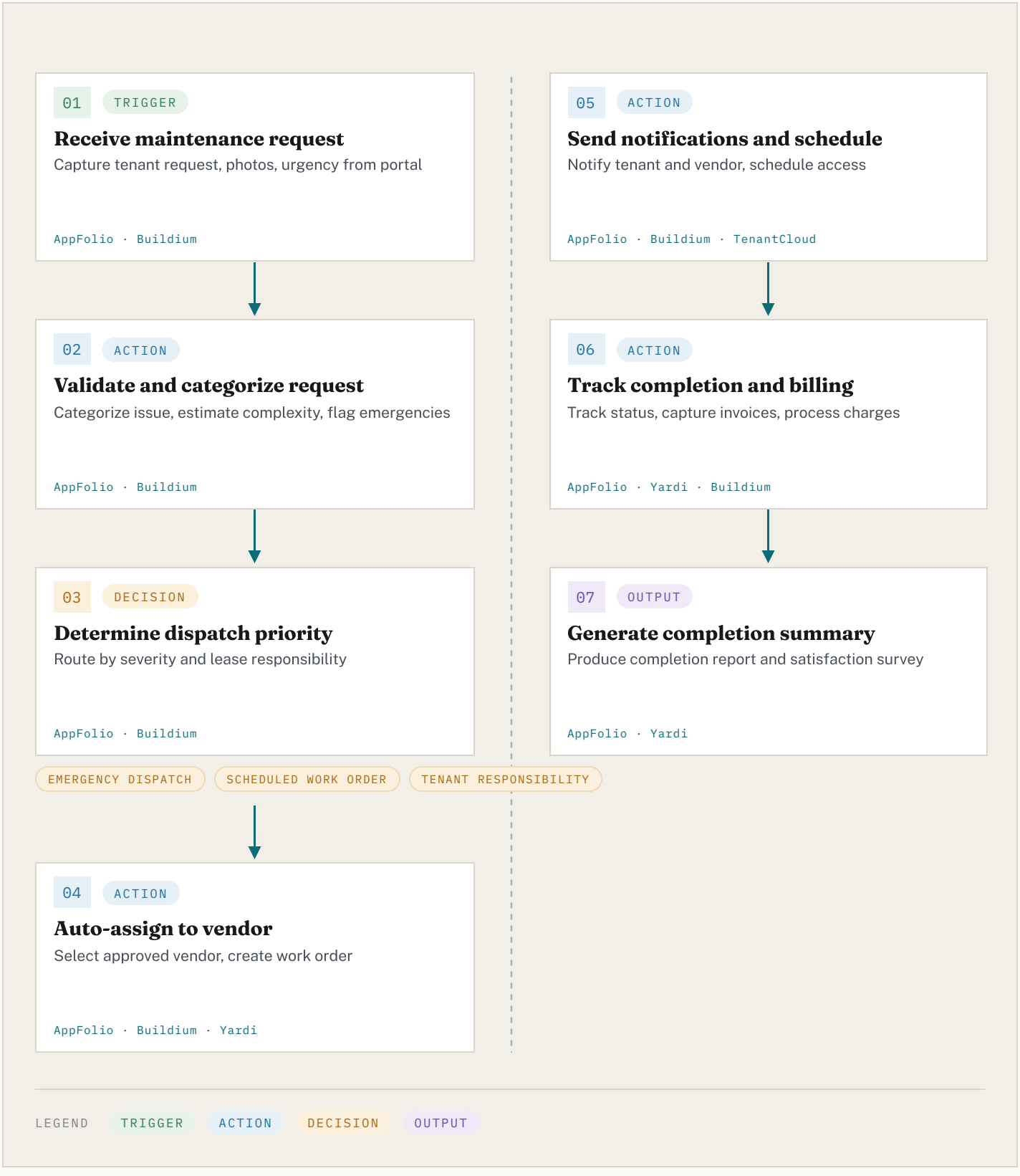
Maintenance coordinators: work the exception queue daily for requests the system flagged as ambiguous or over threshold.

Implementation teams: map issue categories to vendor trades and set portal access instructions per property before turning on auto-dispatch.

THE WORKFLOW

End-to-end stage map

Seven stages run from portal submission to closed work order and updated unit history. The decision point at stage 3 governs whether a request becomes an emergency dispatch, a scheduled work order, or a tenant responsibility letter.



IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Receive maintenance request

Tenant submits maintenance request through online portal with description, photos, and urgency level. System captures all request details and tenant information.

CONTROL POINT

Maintenance coordinator reviews the daily intake queue and calls the tenant directly when the description or photos are unusable.

SYSTEMS AppFolio Buildium

02 ACTION

Validate and categorize request

AI analyzes request description and photos to categorize issue type, estimate complexity, and flag potential emergency situations. System enriches request with property and lease details.

CONTROL POINT

Coordinator verifies the AI category and habitability flag before the request leaves triage and can recategorize with a logged reason.

SYSTEMS AppFolio Buildium

03 DECISION

Determine dispatch priority

System evaluates if request is emergency requiring immediate response, routine maintenance for standard scheduling, or tenant responsibility requiring education. Routes accordingly based on severity and lease terms.

CONTROL POINT

Property manager holds override authority on every emergency call and on any request routed to tenant responsibility.

SYSTEMS AppFolio Buildium

04 ACTION

Auto-assign to vendor

System automatically selects appropriate vendor from pre-approved list based on issue type, location, vendor availability, and performance history. Creates work order with all necessary details.

CONTROL POINT

Property manager approves vendor assignment for any work order above the not-to-exceed amount and can reassign trades manually.

SYSTEMS AppFolio Buildium Yardi

COMPLETION AND MEASUREMENT

Closing stages and results

The closing stages preserve the photo record and invoice trail for each unit and feed vendor scorecards and tenant satisfaction results.

05 ACTION

Send notifications and schedule

System notifies tenant of work order creation and estimated timeline, sends vendor detailed work order with property access instructions, and updates property manager dashboard with status.

CONTROL POINT

Coordinator confirms entry notice timing and access instructions meet state notice requirements before the vendor message sends.

SYSTEMS AppFolio Buildium TenantCloud

06 ACTION

Track completion and billing

System monitors work order status, captures completion photos and invoices from vendor, and automatically processes approved charges. Updates maintenance history for the unit.

CONTROL POINT

Property manager or accounting approves invoices exceeding the standing threshold and signs off on any tenant chargeback posted to the ledger.

SYSTEMS AppFolio Yardi Buildium

07 OUTPUT

Generate completion summary

System creates maintenance completion report with before/after photos, final costs, and tenant satisfaction survey. Updates property maintenance records and vendor performance metrics.

CONTROL POINT

Property manager reviews the completion packet before closing and disputes vendor scores or reopens the work order when photos show incomplete work.

SYSTEMS AppFolio Yardi

DELIVERABLES

- Closed work order with photos
- Updated unit maintenance history
- Vendor scorecard entries
- Tenant satisfaction responses

KEY METRICS

- Average first response time
- Maintenance cost per unit monthly
- Vendor performance rating
- Tenant satisfaction score

IMPLEMENTATION CHECKS

- Vendor COI and W-9 on file
- Invoice approval thresholds by role
- Property access codes restricted
- Photo retention period set
- Audit trail on priority overrides

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

PROPERTY MANAGEMENT WORKFLOW PACKS AND A FREE ASSESSMENT