

Getting Started with

# Workflows

## HELPFUL RESOURCES

Read more about Workflows in the Help Center.



See Workflows in action.

View the replay of our **Lunch & Launch Webinar** on Automation with Workflows.



## BEST PRACTICES

### 1 For Workflows that will include chat messages.

[Make sure to create a new chat template](#) under “Account Settings” before creating this Workflow.

When creating a new chat template, ensure “Change Visibility” is checked and your desired audience for your template is selected. If this box is unchecked, the Workflow will not work.

### 2 For Workflows that will include a tag.

If a tag will be added to a Meld that has not already been created, make sure [to create the tag you'd like to use first](#).



**Key Tip**

Keep a close eye on Melds with specific tags by creating a [custom dashboard filter](#).

# CHAT TEMPLATES

## For Pre-Configured Workflows

Below you will find sample chat templates that you can incorporate into your Workflows. Simply copy and paste the sample copy into your new chat templates.

Workflow Name	Sample Chat	Chat Visibility
Request "after" photos if vendor did not upload any 24 hours after work was completed.	<p>Hello,</p> <p>Please attach photo(s) of the issue(s) you have addressed in this Meld. Photos can be uploaded before or after a Meld is closed out and will stay on record for future reference.</p>	Managers, Vendors
Request invoice if vendor did not upload one 24 hours after work was completed.	<p>Hello,</p> <p>We see that this Meld has been completed, however no invoice has been uploaded. Please upload your invoice to the meld for processing and payment.</p> <p>Thank you.</p>	Managers, Vendors
Auto-reply with triage instructions when an HVAC Meld is created.	<p>Hello, thank you for submitting this meld request. Before we can proceed, please answer the following questions ASAP:</p> <p><b>1.</b> Is there power? If not, go to question 2. If yes, have you checked the filter? If it's dirty, have you replaced it? After replacement, did that fix the issue? If not, please go to question 2.</p> <p><b>2.</b> Have you checked the breaker box? If all are in the correct position, please let us know and we can take action.</p> <p>Thank you.</p>	Managers, Tenants (Residents)

# CHAT TEMPLATES

## For Pre-Configured Workflows

Workflow Name	Sample Chat	Chat Visibility
<p>Auto-reply with triage instructions when a garbage disposal Meld is created.</p>	<p>Hello,</p> <p>Your service request related to an issue with your garbage disposal has been received and we would be very grateful if you would attempt the following troubleshooting steps and let us know if any of them solve your issue.</p> <ol style="list-style-type: none"> <li>1. Reset the GFCI outlet.</li> <li>2. Reset the disposal using the red button on the bottom.</li> <li>3. Attempt to turn the blades safely using the hex key slot on the underside of the disposal.</li> </ol> <p><i>Please reference this 1 minute video for visual instructions on the troubleshooting steps above:</i>  <a href="https://www.youtube.com/watch?v=J00ByRuoYM0">https://www.youtube.com/watch?v=J00ByRuoYM0</a></p> <p>Thank you.</p>	<p>Managers, Tenants (Residents)</p>
<p>Request model # and serial # when an appliance Meld is created.</p>	<p>Thank you for your Meld submission.</p> <p>If you haven't already, please reply with the model # and serial # from your appliance and we will get back to you as soon as we can.</p>	<p>Managers, Tenants (Residents)</p>
<p>Auto-assign HVAC Melds and send a message.</p>	<p>Please review and schedule within 24 hours because of the urgency of this situation. If you are not able to respond or schedule this work request, please reply to this message or let us know so we can reassign to a different Vendor.</p>	<p>Managers, Vendors</p>

# CHAT TEMPLATES

## For Pre-Configured Workflows

Workflow Name	Sample Chat	Chat Visibility
Send a follow up if a Meld was rated as five-stars.	<p>Hello,</p> <p>We are so happy to see that you had a great experience on this meld.</p> <p>Positive reviews from awesome customers like you help others to feel confident about choosing us. Could you take 60 seconds to go to our website and share your happy experiences?</p> <p>[insert URL to preferred review page here]</p> <p>We will be forever grateful. Thank you in advance for helping us out!</p>	Managers, Tenants (Residents)
Send a follow up if a Meld was rated as one-star.	<p>We are sorry you had a negative experience. Please let us know how we can improve in the future by chatting here or contacting our office.</p>	Managers, Tenants (Residents)

## EXAMPLES of WORKFLOWS

Below you will find some additional examples of Workflows that you can create by clicking the “Create Workflow” button in your account, along with an action to configure them.

### Meld Acknowledgment & Request Photos

**Workflow Description:** Anytime a resident submits a Meld request, auto-reply with a message to acknowledge that you’ve received their request and ask them to submit photos if they haven’t already.

#### Sample Chat Template:

Thank you for submitting this Meld request, we will work on taking care of this for you as soon as possible. In the meantime, if you haven’t already, please be sure to submit photos and/or videos of your request to help us better understand what needs to be done and address this as quickly as possible.

### Notify Tenant to Send Lock Box Location

if They Select to Not Be Present for a Meld.

**Workflow Description:** Residents sometimes are given the option to not be present for the scheduled work. Send this resident a message to provide required information to enter the premises for upcoming work.

#### Sample Chat Template:

We have received this Meld and have noted that you selected not to be present when the work takes place.

Please respond with the location that you are planning on leaving a key if the work is to take place inside the home. If you are planning on leaving a lock box then please respond with the lock box location and code.

Please note that you may still receive a notification of the vendor’s appointment time.

Thank you.

*\*Make sure to check ‘Change visibility’ and select ‘Managers, Tenants’ when creating this template.*

## New Chat Received on a Meld

**Workflow Description:** Allows the Property Manager to track new chat from a Vendor, Owner, or Resident. It assigns a tag and can then be featured on the dashboard using a customized filter.

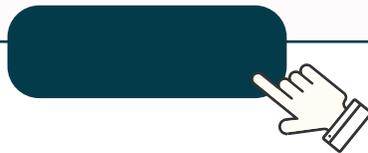
**Tags to Create:** New Chat



## Tag if Chat is Sent After Meld is Completed

**Workflow Description:** When a Meld is completed it is still possible for external parties to communicate, which is important. Tag this Meld and feature it on your dashboard with a customized filter.

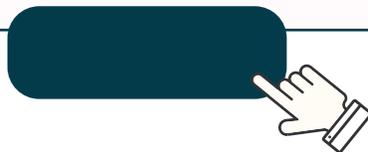
**Tags to Create:** Chats Received on Completed Meld



## Tag Melds Older than 14 Days

**Workflow Description:** Are you tracking your Speed of Repair Metrics? Set a date so you are addressing aging Melds as quickly as possible.

**Tags to Create:** "Older Than 14 Days"



## — Ask Resident to Rate Meld 1 Day After Completion

**Workflow Description:** Make sure your residents are satisfied with their Meld was repaired by reminding them to submit their rating one day after the repair was completed, if they haven't already done so.



### Sample Chat Template:

We noticed that a service request at your property was recently completed but has not yet received a rating from you. Tenant ratings help us to improve and your opinion on our service is highly valued.

When you have a free moment, please rate how the service request went so that we can continue to work on improving your experience with us.

## — Message Residents & Add “Could Not Complete” Tag

When Vendor Meld is Closed

**Workflow Description:** Any time a vendor or internal maintenance tech marks a Meld as 'Could Not Complete', this Workflow will (a) send a message to residents notifying them of this, and (b) tag the Meld so you can easily track these Melds if needed/desired



### Sample Chat Template:

We have received a completed service request from a vendor that states they were unable to complete the work during their visit.

Reasons for this could include:

1. The work could not be done within the maintenance limit and will require an estimate approval from the owner.
2. The scope of work was outside of the service type that the vendor provides and we will need to send someone else.
3. Resident canceled request

If reasons 1 or 2 are the cause of this status change then rest assured we are working to get approval on an estimate or find a more suitable vendor to send back out to you.

## Change Priority to High

if a Meld Description Contains the Word "Mold"

**Workflow Description:** For any Melds that are submitted which are always a high priority and need to be addressed immediately, automatically change the Priority Level of these Melds to High.



### Key Tip

Recreate this Workflow for other Meld Descriptions that are also always high priority, such as: flood, stove, refrigerator, or Heating/AC Meld Category.

## Send Message to Vendor to Accept High Priority Meld

in Less than 24 Hours

**Workflow Description:** High Priority Melds need urgent attention. Auto-send a message to vendors as soon as you assign them a High Priority Meld, requesting that they accept and schedule this in less than 24 hours.

### Sample Chat Template:

Thank you for accepting this Meld work request. This is an urgent, High Priority request and we need you to review, respond, and schedule immediately with the Tenant.

If you are not able to respond or schedule this work request, please reply to this message immediately.

## Unassign High Priority Meld

If It Was Not Accepted within 24 Hours

**Workflow Description:** If a Meld is High Priority, you want it to be addressed ASAP. This will unassign the selected vendor within 24 hours if they did not accept the work, so you can then get another vendor to act faster.

## Send Message to Ask Vendor to Accept and Schedule Meld

1 Day After It is Assigned

**Workflow Description:** Make sure your vendors are accepting and scheduling Melds in a timely manner to meet your ideal Speed of Repair time and keep residents happy. Auto-send your vendors a message asking them to accept and schedule a Meld 24 hours after it was assigned.

**Reminder:** [As shown here in the Help Center](#), the system automatically sends all vendors a reminder after 48 hours if a Meld has not been accepted.

### Sample Chat Template:

Thank you for being a valued Vendor of ours. Could you please review and schedule this Meld within the next 24 hours?

If you are not able to respond or schedule this work request, please reply to this message or let us know so we can reassign to a different Vendor.

## Send Message to Ask Vendor to Schedule Meld

or Provide Availability to Tenant (5 Hours after Acceptance)

**Workflow Description:** Make sure your vendors are scheduling Melds in a timely manner to meet your ideal Speed of Repair time and keep residents happy. Auto-send your vendors a message asking them to schedule a Meld 5 hours after it was accepted.

### Sample Chat Template:

Thank you for being a valued Vendor of ours. Could you please schedule this Meld or provide your availability to the tenant(s) within the next 24 hours?

If you are not able to respond or schedule this work request, please reply to this message or let us know so we can reassign to a different Vendor.

## Tag if Waiting on Owner Approval for 4+ Days

**Workflow Description:** Are you tracking your Speed of Repair Metrics? Set a date so you are addressing aging Melds as quickly as possible.

**Tags to Create:** "Pending Owner Approval > 4 Days"

## Send Message to Tenants if They Indicate Animals are Present at Residence

are Present at Residence

**Workflow Description:** Ensure your company's protocol is known when a residence is occupied with an animal.



### Sample Chat Template:

Because you indicated that animals are present at your residence, please ensure that [insert your protocol here].

## Add "Tenant Responsibility" Tag and Send Chat to Resident for Lock Changes

to Resident for Lock Changes

**Workflow Description:** Make sure your vendors are scheduling Melds in a timely manner to meet your ideal Speed of Repair time and keep residents happy. Auto-send your vendors a message asking them to schedule a Meld 5 hours after it was accepted.



### Sample Chat Template:

Please note that as your lease indicates, Lock Changes fall under Tenant Responsibility. As such, this Meld will be closed. Please respond here through Chat if you have any questions.

**Tags to Create:** "Tenant Responsibility"

**Key Tip:** Replicate for others such as pest control, breaker flips, clogged toilet, etc.