OFFICE WORKFLOW

OPENDEED · OFFICE AUTOMATION

Office Workflow Suite

Centralize receipts, lease documents, signing progress, and PM collaboration into one office workflow that can be reviewed and traced.

2 core office workflows	**3** video walkthrough placeholders	**17** slides for review and demo

01 · OFFICE OPERATING SHIFT

Office work moves from data entry to approval

This is not just another admin screen. It turns work scattered across email, PDFs, chat, and Buildium into one review flow.

- **After a PM submits documents, Office sees structured information**
- **Review shifts from retyping to checking, correcting, and approving**
- **Each action keeps its source, status, and destination**

01 **PM submits**
Receipts or lease files enter the system

02 **AI organizes**
Fields, categories, and matches are extracted

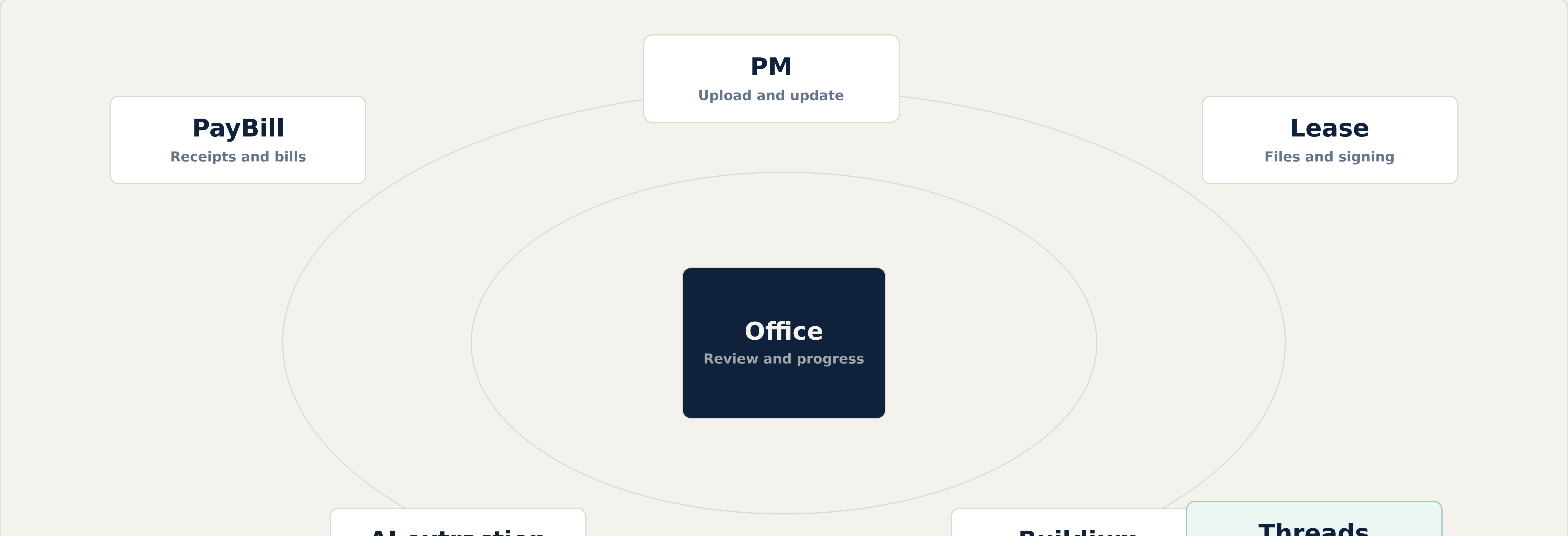
03 **Office reviews**
The team checks details and handles exceptions

04 **Sync and archive**
Approved records move to Buildium or signing

02 · TWO OFFICE WORKSTREAMS

PayBill handles bills. Lease Workflow handles files and signing.

Both workflows are built around PM and Office collaboration. The goal is less re-entry, fewer follow-up messages, and fewer system switches.



RECEIPT INTAKE

Upload → Extract → Review

Property address	Auto-matched
Amount and items	Auto-read
Expense category	AI suggested

03 · PAYBILL RECEIPT AUTOMATION

PayBill moves each receipt into an approval queue

After a PM uploads a receipt, the system reads the property address, vendor, amount, line items, expense description, and suggested category.

- **Multimodal AI reads the receipt and the type of expense**
- **PMs no longer fill every field or recheck address and amount by hand**
- **Office receives a record ready for review**

04 · VIDEO PLACEHOLDER

Video placeholder: creating a property and owner record

This slide uses the sample Guidde iframe for now. Replace it later with the matching PayBill or Office walkthrough.

- **Use it to explain how property and owner data enters the review path**
- **The page controls video sizing, so the iframe can be swapped in place**
- **The hidden transcript stays in the page for later replacement**

05 · REIMBURSEMENT WORKFLOW

Reimbursement starts with an upload, not a manual form

When a PM uploads a receipt for a property expense, the system creates a pending record. Office checks the extracted fields, property match, and category.

- **PMs spend less time sorting receipts and filling fields**
- **Office sees the original receipt next to the extracted result**
- **Approved records are sent to the Buildium Bill module**

01 **Upload receipt**
PM submits expense evidence

02 **Create record**
AI extracts fields and category

03 **Office checks**
Property and amount are confirmed

04 **Send bill**
The record syncs to Buildium

VENDOR BILL	Profile + Bill + Property
Vendor	Profile synced
Bill	Sent after review
Property	Linked automatically

06 · VENDOR PAYMENT WORKFLOW

Vendor payments connect supplier records to bills

For bills payable to a vendor, the system supports creating, maintaining, and syncing vendor details. Approved bills attach to the right property.

- **Vendor profiles are maintained in one place**
- **Approved bills move into Buildium**
- **Each expense remains tied to a property and service context**

07 · OFFICE REVIEW AND NOTIFICATION

Office review and Buildium sync become one approval step

After a PM submits a receipt, Office receives an email notification and reviews the property match, category, original receipt, and AI result.

- **The review flow becomes approval instead of re-entry**
- **Questions can be checked against the original evidence**
- **Approved receipts are sent to the Buildium Bill module**

01 **Email notice**
Office receives a pending review alert

02 **Admin review**
AI output and receipt are checked together

03 **Approve**
Exceptions are handled or passed

04 **Buildium Bill**
The bill is synced

LEASE HUB	Property → Files → Signing
Data sync	Buildium Property
Document collection	Owner / Tenant
Signing archive	Completed in one place

08 · LEASE WORKFLOW COORDINATION

Lease Workflow is the hub for lease work

It brings property sync, document collection, AI extraction, lease generation, e-signing, and file-level discussion into one workflow.

- **The process starts with property data synced from Buildium**
- **PMs upload lease-related documents under each property**
- **Office reviews completeness and fields from the same data set**

09 · PM SIDE

PM-side document collection is organized by property

PMs upload leases, owner bank details, owner IDs, tenant bank details, and tenant IDs under the properties they manage.

- **Documents no longer sit across email, chat, and external folders**
- **AI can extract key data such as bank account details**
- **Files stay tied to the right property and lease workflow**

01 **Lease files**
Contracts and supporting documents

02 **Owner files**
Bank details and ID

03 **Tenant files**
Bank details and ID

04 **AI extraction**
Less manual entry

10 · VIDEO PLACEHOLDER

Video placeholder: lease document upload and AI extraction

Replace this later with a walkthrough of PMs uploading lease files and bank documents, then letting AI extract the key fields.

- **Shows how files move from the PM side into Office review**
- **Fits bank details, IDs, and lease PDF archiving**
- **Keep the placeholder iframe and swap the src and title**

OFFICE CHECKLIST

Complete · Verify · Follow up

File completeness	Checked item by item
Field review	Bank / ID / Lease
Missing items	Tied to the file

11 · OFFICE SIDE

Office-side file review becomes a structured checklist

Office checks uploaded files for completeness, verifies key fields, and follows up on missing or incorrect items.

- **Status is confirmed per property and per file**
- **Missing documents, corrections, and approvals have a clear place**
- **Handoffs no longer require digging through email or chat**

12 · SIGNING CENTER

The signing center replaces DocuSign

Contract fields are generated from owner, tenant, and property data. Preparation, field generation, signing, and archiving stay in the same platform.

- **Less copying, pasting, and missing fields**
- **Signing status and archive location are visible**
- **PM and Office no longer debate which file version is current**

01 **Generate fields**
Owner, tenant, and property data fill the contract

02 **Send for signing**
Workflow status is tracked

03 **Collect signed file**
The signed document returns to the system

04 **Archive**
The file is tied to the lease and property

FILE THREAD

Question tied to evidence

Discussion target	One file
What gets handled	Missing / Correction / Approval
Result	Context retained

13 · FILE-LEVEL DISCUSSION

File-level threads replace scattered follow-up

Each file has its own discussion area, so Office and PM can talk about missing documents, corrections, and approvals in context.

- **Questions stay attached to the file they are about**
- **Context does not disappear into email or chat**
- **This covers much of the document collection and status review work previously handled in SkySlope**

14 · VIDEO PLACEHOLDER

Video placeholder: Office review and signing progress

Replace this with an Office-side walkthrough that reviews files, starts signing, handles discussion, and completes archiving.

- **Show how Office moves from checklist to file or signing action**
- **Show how questions stay inside file-level threads**
- **Show how signed documents return to the lease workflow**

Office can run daily work through a stable process

PayBill has been used in the PM Office reimbursement flow for more than five months and has processed thousands of receipt recognition tasks. Lease Workflow turns lease work into a standard process the team can move forward.

Less entry

PM and Office both fill fewer fields

Reviewable

AI results, source files, and status stay together

Collaborative

Questions stay tied to the receipt, file, or property

Synced

Buildium, signing, and archiving form one loop

16 · CLOSING

Office Workflow Suite turns back-office work into a repeatable process

PayBill handles receipts and bills. Lease Workflow handles leases, files, and signing. Together, they reduce chasing, re-entry, and system switching for Office.

- Receipts reviewed
- Files tracked
- Signing advanced
- Process auditable