PHANTOM WORKFLOW

Property operations and tour access planning

Separate leasing, visitor access, and maintenance decisions across property operations.

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This is a planning guide for your own workflow. It is not a client result or a finished build. The guide text matches the web page.

Read this whitepaper online

Separate the request types

A leasing prospect, resident, property owner, and vendor need different record access and staff destinations. Identify the request type before selecting the workflow.

A tour request is not an approved visit, and a maintenance report is not an accepted vendor dispatch. Keep those states visible in both the software record and messages sent to the person requesting help.

Verify the vendor route

AppFolio describes a Stack partner application and review process. Yardi describes licensed interface access and development steps. Do not assume that every account permits the desired integration.

Confirm the intended resource operations, account entitlement, and test environment with the vendor and the business. Do not substitute undocumented database or browser access for a supported route.

Treat identity and access separately

Stripe describes identity-document verification. A verification result alone does not authorize entry, determine tour eligibility, or guarantee prevention of fraud.

Document the booking, visitor review, property approval, access activation, and revocation as separate decisions. Have staff define exceptions and a recovery procedure if the booking or access-control provider is unavailable.

Test the operating exceptions

Test unknown units, canceled visits, time-zone changes, repeated reports, failed identity checks, and unavailable staff. Verify that leasing and maintenance teams can see their own unresolved work.

Measure task completion and corrections over a defined pilot period. This guide does not claim reduced vacancy, prevented unauthorized entry, or completed Phantom client results.

Decisions to write down

Checkpoint	Decision
Request	Is this a prospect, resident, owner, or vendor request?
Integration	Which partner or interface route is approved?
Authorization	Who approves a visit or accepts a maintenance escalation?
Revocation	How is access removed after a cancellation or changed decision?

Sources

AppFolio: AppFolio Stack partner program. Checked 2026-10-05.

Yardi: Become an Interface Partner. Checked 2026-10-05.

Stripe: Stripe Identity. Checked 2026-10-05.

Related guides

AppFolio and Yardi: self-guided tour access planning

How to plan urgent maintenance intake and escalation