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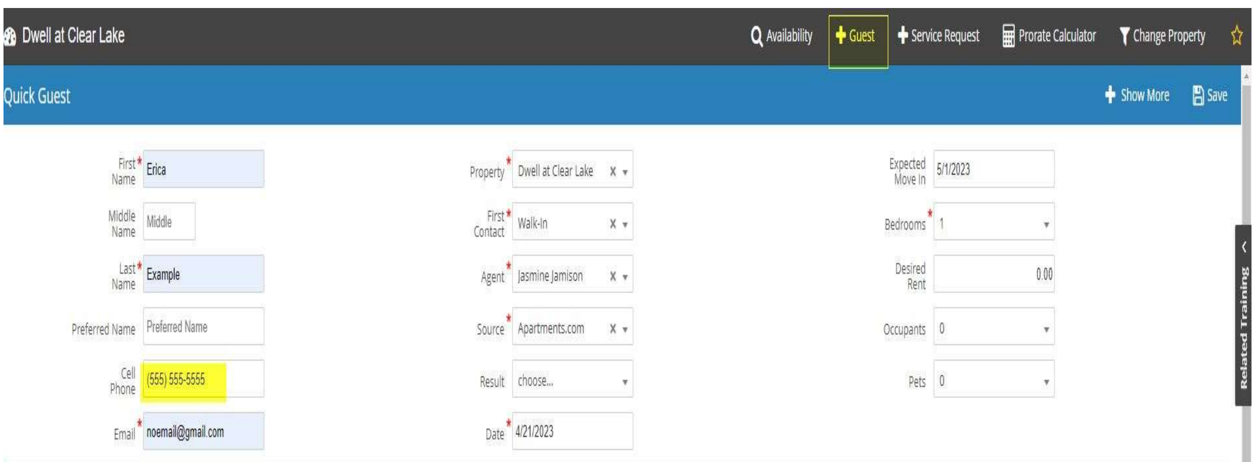
ENTERING TRAFFIC IN CRM

- One of the most significant functions we use in CRM is entering traffic into CRM.
- Each community's traffic and tours are monitored by corporate.
- Every tour or show, as CRM refers to it, must be entered.
- To start you must have the prospect's information saved in CRM. We accomplish this by creating a guest card.

HOW TO CREATE A GUEST CARD

  - You will need to click on the **+Guest** button.
  - This step will lead you to the **Quick Guest** section.



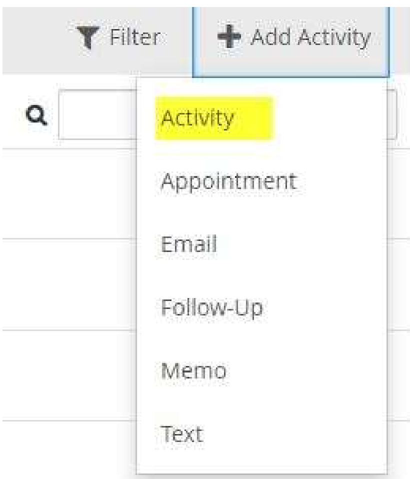
- **You must fill out the following fields.**
  - First Name
  - Last Name
  - Preferred name: **Only if applicable**
  - Cell Number
  - Email
  - Property: It will default to your community
  - First Contact: How did they contact us? Call, email, etc. Did they walk in?
  - Agent: Assign your name to make sure you receive credit
  - Source: Howe did they find out about our community? Facebook, apartments.com., etc.
  - Expected move-in day.
  - Bedrooms: Number of bedrooms
- By utilizing the sales card, you should have the answers to all the questions and be able to fill out the guest card accordingly

WHAT QUALIFIES AS A SHOW?

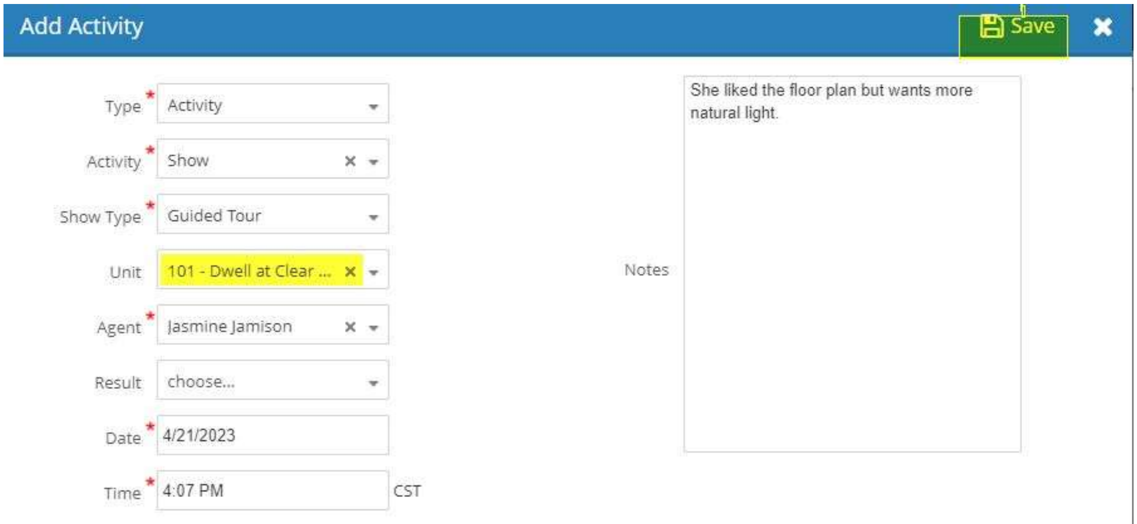
- When a prospect is shown an area of the community outside the leasing office, this is considered a show.
- Upon returning to the office from a tour, the first task you must complete is promptly entering the show into CRM.

HOW TO ENTER A SHOW

- Go to the **+Add Activity** tab.
- You will be shown the screen below.



- This step will lead you to the **Add Activity** section.
- It will then prompt you to enter all the details.

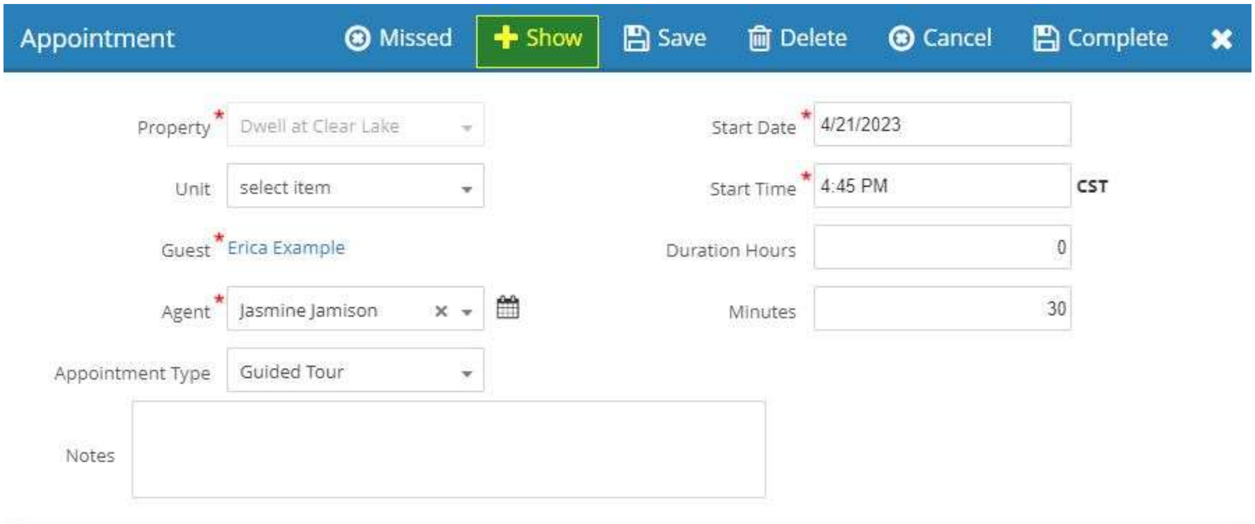


- Fill out all the fields.
    - Type: Activity
    - Activity: Show
    - Show Type: Guided Tour
    - Unit
    - Agent: Assign yourself as the agent to receive credit
    - Enter all details about the tour in the notes section then save.

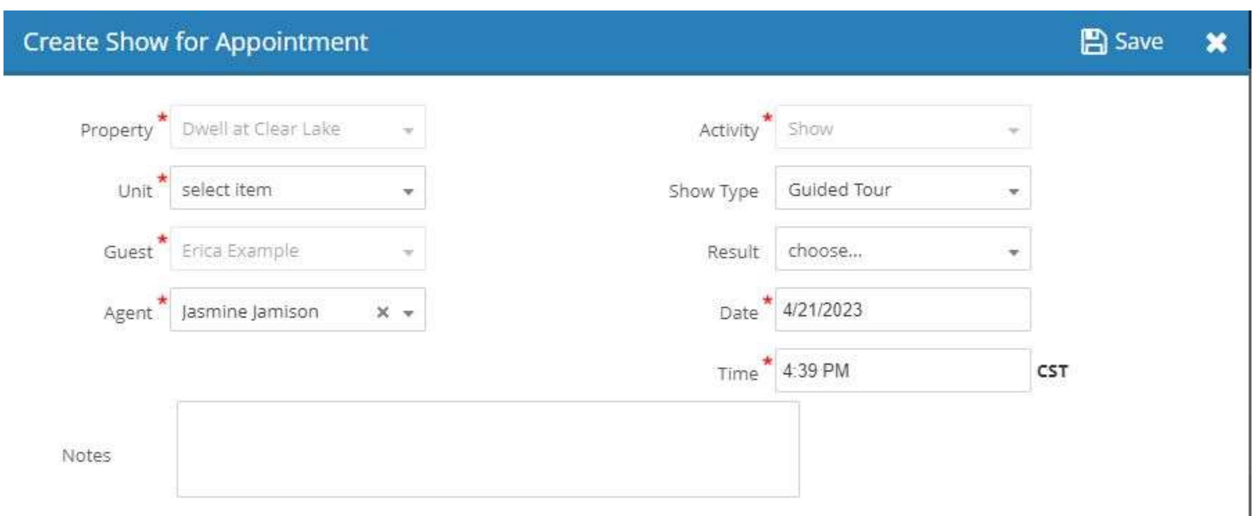
HOW TO ENTER A SHOW FROM AN APPOINTMENT

- Entering an appointment is different than entering a show. Even if you have an appointment, you are still required to enter the tour (show).
- First locate the appointment in the prospect's guest card

- Click on the box with a pencil inside of it to the very right
- This step will lead you to the **Appointment** Section



- Click on the **+Show** button
- This step will lead you to the **Create Show for Appointment** Section



- Fill out all the fields.
    - Property
    - Unit
    - Guest
    - Agent: Assign yourself as the agent to receive credit
    - Activity: Show
    - Show Type: Guided Tour
    - Enter all details about the tour in the notes section then save.

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