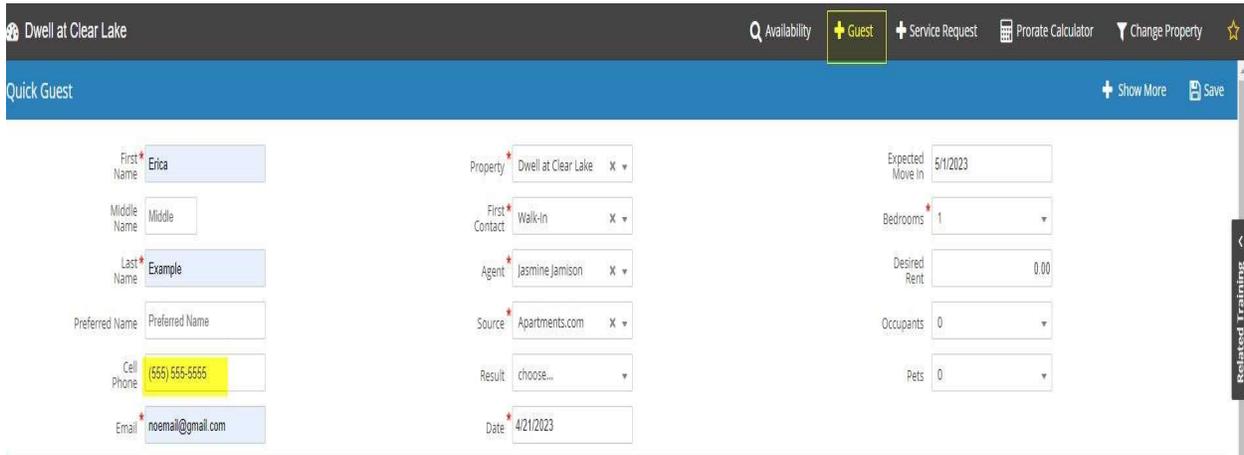


ENTERING TRAFFIC IN CRM

- 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.



The screenshot shows the 'Quick Guest' form in the CRM system. The form is titled 'Dwell at Clear Lake' and includes a navigation bar with buttons for 'Availability', '+ Guest', '+ Service Request', 'Prorate Calculator', and 'Change Property'. The form fields are organized into three columns:

- Left Column:**
 - First Name: Erica
 - Middle Name: Middle
 - Last Name: Example
 - Preferred Name: Preferred Name
 - Cell Phone: (555) 555-5555
 - Email: noemail@gmail.com
- Middle Column:**
 - Property: Dwell at Clear Lake
 - First Contact: Walk-in
 - Agent: Jasmine Jamison
 - Source: Apartments.com
 - Result: choose...
 - Date: 4/21/2023
- Right Column:**
 - Expected Move In: 5/1/2023
 - Bedrooms: 1
 - Desired Rent: 0.00
 - Occupants: 0
 - Pets: 0

A 'Save' button is located in the top right corner of the form. A vertical sidebar on the right edge of the form is labeled 'Related Training'.

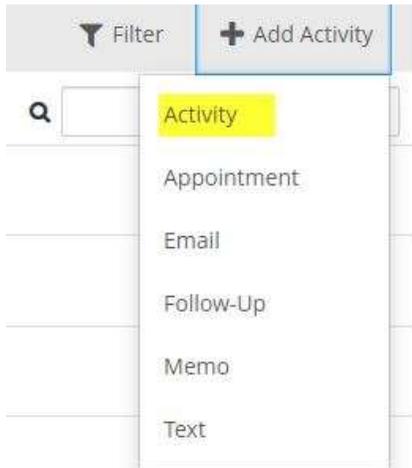
- **You must fill out the following fields.**
 - First Name
 - Last Name
 - Preferred name: **Only if applicable**
 - Cell Number
 - Email
 - Property: It will default to your community
 - First Contact: How did they contact us? Call, email, etc. Did they walk in?
 - Agent: Assign your name to make sure you receive credit
 - Source: How 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.

Add Activity
Save
✕

Type *

Activity *

Show Type *

Unit

Agent *

Result

Date *

Time * CST

Notes

She liked the floor plan but wants more natural light.

- 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

Appointment: Guided
Due in 12 minutes

Jasmine Jamison

Dwell at
Clear Lake

Save

Complete

✎

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

Appointment ⊕ Missed + Show Save Delete ⊕ Cancel Save Complete ×

Property* Start Date*

Unit* Start Time* CST

Guest* Duration Hours

Agent* ×  Minutes

Appointment Type

Notes

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

Create Show for Appointment Save ×

Property* Activity*

Unit* Show Type

Guest* Result

Agent* × Date*

Time* CST

Notes

- 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.

