Computer Lab I & II

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1. Introduction to new programs and what each is used for.

Q-What program(s) are we adopting/replacing?

A-RentCafe CRM/Flex replaces ILL and RentCafe Site Manager replaces Apts247.

Q-What does CRM stand for?

 A-CRM stands for Customer Relationship Management.

Q-How does RentCafe work with Yardi Voyager Residential?

A-Both RENTCafé CRM Flex and RENTCafé Site Manager connect with your Voyager database so that data is synchronized across all sites and applications.

Q-What is the difference between RENTCafé CRM Flex and Yardi Voyager?

A-RENTCafé CRM Flex is a simplified, mobile version of Yardi Voyager that also allows for customer relationship management and lead tracking. RENTCafé Site Manager gives you access to manage your portals and your marketing presence on the web.

Q-What processes **can** be done through CRM?

|  |  |  |
| --- | --- | --- |
| Guest Cards | Generate & Sign leases | Service Requests |
| Waitlist | Move-Ins | Review Pending Make Ready |
| Grouping Applications | Expiring leases | Unit Transfers |
| Applications and Screening | Notice | Move-Outs |
| Upload documents | Renewals | Deposit Accounting |
| Memos | Renters Insurance |  |
| Emails | Promote Roommate |  |

 There are no changes to Engaging Leasing, Renewal and Leasing philosophies themselves, only where they are completed through.

Q-What processes **cannot** be done through CRM?

|  |  |  |
| --- | --- | --- |
| CheckScan | MultiLine Updates | Purchase Orders |
| Recurring EFT | Schedule/Update Make Ready | Payables |
| Bulk Text |  |  |

1. Getting Started
2. We have setup new accounts for you to access Site Manager in our testing environment.
3. The system will send out a “User Registration Confirmation” which will provide a link for you to follow to create a password and log in to your Site Manager account. This username and password should be saved for future Site Manager access with today’s training.
4. \*\*Please log into your email account at this time to complete the registration process. Know that this is for training purposes only and will not impact your current or future accounts in the LIVE environment.
5. New URLs:
	1. CRM = <https://www.yardiasptx11.com/94633siflex/login> and database = Training
	2. Website = https://michelsonrealty-rentcafewebsite.rcmvctest.com/fenwick-test-st-louis-mo-45689
	3. Site Manager = https://sitemanager.rentcafe.com/sitemanager/login.aspx

3 Navigation Basics - CRM

 a. Search

 b. Dashboard - equivalent to Home in Voyager

 c. Left side menu – changes menu items instead of branching

 d. Right side ellipsis (…) provides the action item links

 e. Prospect Screen – Top Menu prompts with current workflow step

4 CRM Queue - Unreviewed Queue – Incoming Traffic

 Blue - existing prospect/resident

 Orange - not in system

 Listen to message

 Trashcan (Reports – CRM – Invalid Lead)

 Blue arrow takes you to Guest Card

1. Claim lead by changing the Agent from Property Website to agent
2. Follow Ups automatically created for 1st contact and then are replaced as they progress through the leasing steps

 (The follow ups are property defined and can be customized by request)

**EXERCISE:**

 Conference Prospects

* Go to property website and enter info in Contact Us
	+ Enter an email address you can be reached at during this training exercise (Note – Try to avoid names, emails already found in Yardi.)
* Open email account used above and check for agent’s email and respond

 CRM trainees will work the lead in CRM

* + Go to CRM Unreviewed Queue and locate lead
	+ Claim lead
	+ Respond to request using email
	+ Watch CRM Unreviewed Queue for response
	+ Go to Prospect screen and review conversations in activity tab

5 Online Application process discussion

* Search Availability – System is set to only display availability 4 months into future and only allow prospects to select a Move In date 10 days out
* Waitlist may be selected without the prospect applying
* Be prepared to notify online prospects that move-in dates and lease expiration dates selected online may vary slightly based on property “circumstances”

**EXERCISE:**

1. Half select apartment and other half select Wait Unit
2. Complete Application
3. Terms and Agreements - Yardi
4. Verify statements are correct
5. Custom: Bank Info & Referral Info
6. Adding Additional Occupants
* Best practice to have prospects add their others and send invite (minimal information required; Name/Relationship/Email Address)
* Office Staff can add additional occupants and invite to Rent Café to complete application
1. Sign Rental Agreement
2. Application Charges – where is their source
3. Promo Codes – PEP type discounts
4. Payments
5. Screening automatically occurs in LIVE environments – sometimes breaks in the online process will prevent screening from running automatically and can be run manually as needed

**EXERCISE:**

Merging Guests

* Add a guest using the same name as your earlier web lead
	+ notice the matched options below to choose from existing prospect
		- select existing or copy from existing into new
	+ Use search function to locate
		- Click Enable Merge Guest on upper right menu
		- Select the prospects to merge
		- Click Merge Guest on upper right menu
		- Select record to use as primary guest
		- Review and edit as necessary, click Merge Guest

6 Grouping Applicants Demonstration

* Dashboard- left side menu Traffic > Group Applicant

7 CRM Queue - Community Queue

* Filter by Contact Type (Prospect – Applicants – Resident)
* View Appointments
* Find Prospects w/o Active Follow-Ups
* Discussion on follow-ups and 2233 memos
	+ standard 2233 replaced by follow-ups or automated email
	+ Interim period will still have both 2233's and follow-ups
	+ extended 2233 can remain

8 PFUL impact

 Complete Follow-Up demonstration

1. discuss adding comments through follow ups vs adding through activity

9 Lease Management – Coming soon sneak peak

 \*\*MRC Lease - basic 4 steps

* Information entered flows directly into lease document, any changes will require the lease to be regenerated
* Email sent to Future Resident for signing through Portal

*We will host Zoom sessions closer to the time we roll out the leases.*

10 Management Overview

* Reports - CRM – Call
* Reports - CRM – Invalid Lead
* Reports - CRM – Reasons Did Not Rent
* Reports – Screening Dashboard - Resident Screening Dashboard

11 Site Manager

* 1. User management
	2. Maintenance On Call – Scheduling and Call Automation App ?s

12 CRM Email Templates – used for single recipient communications

**EXERCISE:**

* + Create CRM Email Template
	+ Send an Email using a template

13 Site Manager Email Templates – used for multiple recipient communications

**EXERCISE:**

* + Send an Email using a generic template

14 Voyager Specials vs. RentCafe Specials

**EXERCISE:**

* + Set up specials

15 Nudge Marketing - Demonstration

* Site Manager navigate to Marketing
* Nudge Marketing – simplest is Custom Message

16 Q&A