



FIRST PACIFIC

FIRST PACIFIC GROUP, INC.

LEASING SPECIALIST TRAINING GUIDE *2025*

Note: DO NOT PRINT this guide as the company updates it frequently. Thank you.

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(To quickly find a specific page on your keyboard click
CTRL F. Then type the keywords)

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Account Logins

Below are the various logins you'll use in your daily tasks. Please be sure to change your passwords once you log into each. This page can be printed and your login information entered for your records.

Fpacific Email

Username :
Password :

Facebook (setup with fpacific email)

Username :
Password :

YardiOne

Username :
Password :

Craigslist Account (setup with pacific email)

Username :
Password :

Property Specific Logins

These are logins that everyone uses at the property. Please do not change any account information

Most of these links you can find on our www.fpacific.com/resources/page.

The FG resources page has a monthly bulletin board with company reminders, and down below are the resources page links. This page is password protected.

The Directory contains contact information for all team members

The collage includes a monthly calendar for November with birthdays and anniversaries listed. It also features a section for 'EMPLOYEE OF THE MONTH' with a photo of Francisco Corbero. Below the calendar are logos for various company systems and services, including YardiOne, PeopleHub, TANDEM HR, RingCentral, and tcp. At the bottom, there are links to various support and resources pages, such as Yardi Support, Tech Support, Marketing, Properties, Policy Changes, and Org Chart.

Office Information

Property Specific Logins

Have a good look through the website so that you are familiar with it and know what prospects and residents can see and do.

Office Hours

Your Schedule

What to do if you're sick

Uniform

Eating, Smoking & Lunch Breaks

- Please remember to be professional.
- Eating and smoking should not be done in front of prospects or residents.
- You should always stagger breaks and lunch so the office is covered.
- You should not eat at your desk.
- Smoking should be done out of the view of any residents and away from the office.
- If you do smoke please ensure that you have plenty of mints to avoid carrying the smell to the office.

Parking Your Car

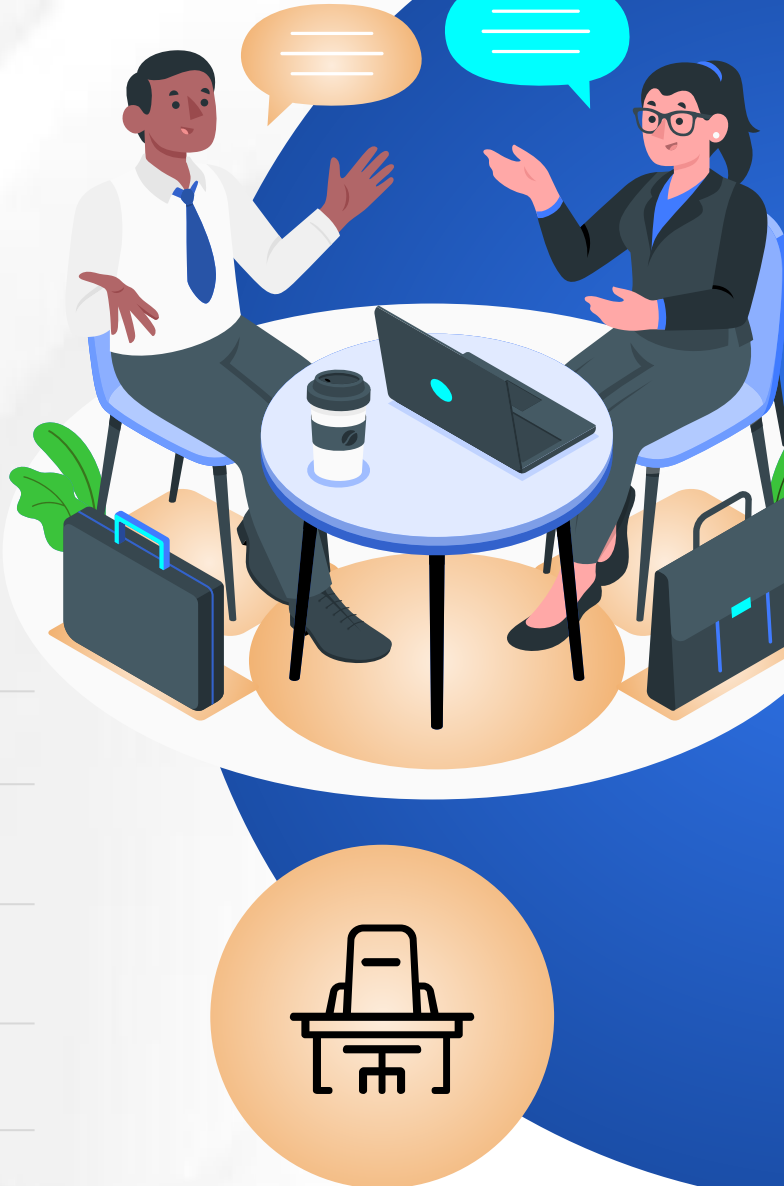
- Check with your manager about where you should be parking.
- Always ensure that your car is not by the office. Leave these areas available for future residents.

Time Sheets & Time Clock

- Every day you must clock in and out using the time clock. If you fail to miss a punch let your manager know immediately.
- Please remember to clock in and out for lunch.
- At the end of the pay period you will sign your timesheet acknowledging it is correct.

Your Team

- You are now part of a team and should work together to accomplish your goals!





Office Information

Keep Track, Date Stamp

- Please be sure to date stamp all incoming items to the office
- This includes invoices received.

Cost of Replacement Items

When moving in, we give many items to the new resident that they are responsible for. If they are somehow lost, they must pay to replace them.

Ideas ?

We want to hear from YOU! All feedback is welcome. Your suggestions are all valuable so speak up, let your manager know. The weekly team meeting is a good time to share these or send a anonymous feedback form on the resource page.

*Further policy information is available in the FG handbook. It is company policy to review this.

You are required to review the handbook and sign that you have reviewed it via eLearning.



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Daily Tasks

(This list as well as your specific responsibilities for the day, may differ from site to site)

- Refill refreshments
- Open all "show " units (Thermostat should be set to 80 in summer and 55 in winter)
- Make sure the tour path and show units are clean and free of debris
- Open email and leave open all day - respond promptly to emails
- LEASE! LEASE! LEASE! (After all, your title is LEASING Specialist!)
- Post to Craigslist, Facebook and all other internet sites daily
- Enter all completed work orders
- Enter new work orders promptly
- Respond to all items in the queue
- Follow up on renewals
- Be enthusiastic and ready to provide excellent customer service
- 15 min before closing shut down all show units
- Turn off all electronics in office
- Set alarm
- Secure all doors
- Walk every vacant unit every 72 hours to check for burst pipes and no squatters.

Understand curb appeal. If you see anything that is not right or needs attention report it to your supervisor or have it attended to. Your eyes are fresh every day and we need you to see things as the resident or prospect will. Everything should be perfect!

Keep in Mind at All Times

- Cell phones – OFF
- Smile ☐
- Be focused while at work
- Once done with a file, put it back – do not leave files on desks
- Do not keep excess items on your computer desktop

Daily Tasks

Every morning the Manager or team leader will send out a daily tasks email. This email will consist of tasks that need to be completed for the day and reminder and announcements such as: scheduled appointments and tours, inspections, meetings, move-ins, move-outs, etc.

Leasing Specialists are required to reply to this email at the end of the day updating their manager and team on what was accomplished or what wasn't and why. See examples of daily task emails and responses below:



Thursday, 5.23.2019~

- Post 2 CL- **Done.**
- Work Emails- **Done.**
- Follow ups- **Done.**
- New Leads- **Done.**
- Pending Signatures - Not done yet.
- Email August renewals- 1/2 DONE
- Work through applications- **Done.**
- Call Leads- **Done.**

Tesha Grams Tour- **Done.**

Johnathon McElory Tour- **Done.**

Move ins~
908-2D

- Gift- **Done.**
- Pics- **Done.**
- MR- **Done.**
- Uploaded- **Done.**

920-3B

- Gift- **Done.**
- Pics- **Done.**
- MR- **Done.**
- Uploaded- **Done.**

Nicki

Post creatively to CL **Done!**
Follow up with All Leads **Done!**
Create UA **Done!**
Text June renewals **Done!**
Clubhouse - water/coffee/candy/nuts/flyers/music **Stocked!**
Pending Signatures **All signed!**
2:00 On site manager meeting
3:00 - 4:00 Manager Meeting

Elaine

Post creatively to CL **Done!**
Follow up with All Leads **Done!**
Models - sparkle/ensure fully stocked **Done!**
Appt: Desteny White @ 3:45
Email August renewals (split with Kim) **Done!**

Liz

Voicemails/Faxes **Followed-up with**
Work order follow up **Done!**
Confirm move ins for Friday/Saturday **Confirmed!**
Confirm appointments for Friday/Saturday **Confirmed!**

Your Name Here

- Open/Close Models opened
- Water/Flyers/Candy are all stocked in Office done
- Post to CL 3+ times CRM - Spread out done
- Work Pending June Renewals/July Renewals done
- Appointment

They already applied, just wanted to see model again



Email

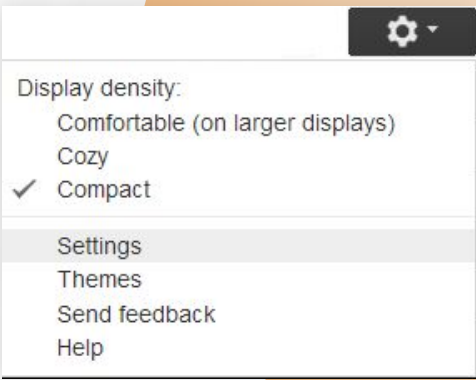
You have received your @fpacific.com email account. To log into it, you must go to www.gmail.com. Remember to change your password upon logging in.

Your @fpacific.com email address should only be used for internal communications and vendors. You WILL NOT use this email account to respond to Prospects or Residents as that communication will be done via CRM IQ for tracking purposes.

NOTE : Use your email in the Google Chrome browser. It provides automatic spell checking when writing emails and allows you to paste screenshots directly into the body of your email.

Setting Up Your Signature

- In the top right-hand corner of your Inbox there is a toggle wheel, click it and go down to 'Settings'.
- About halfway down the page there is a section called 'Signature'
- In the 'Signature' box please paste in the signature that is set up for you already in the Email Signature instruction document. Please navigate to and open this instructional document which should be located in the same folder that the training manual is in on the Google Drive.



NOTE : Make sure that the check box under the signature box is Checked

☒ Insert this signature before quoted text in replies and remove the "--" line that precedes it.



Email Etiquette

- All e-mails should be answered in a timely and professional manner.
- Compose all emails with a "Hello Name or Hi Name,"
- Be sure to spell check all your emails and double check your grammar.

How to Reply to Prospects

Your site will have a standard response that you can copy and paste, then change it to individualize it and meet the prospect's needs. All email communication to prospect and residents should be done via CRM Email Activities. All email communications should be completed directly from the Prospect or Resident account so that all Activities are documented.

Email

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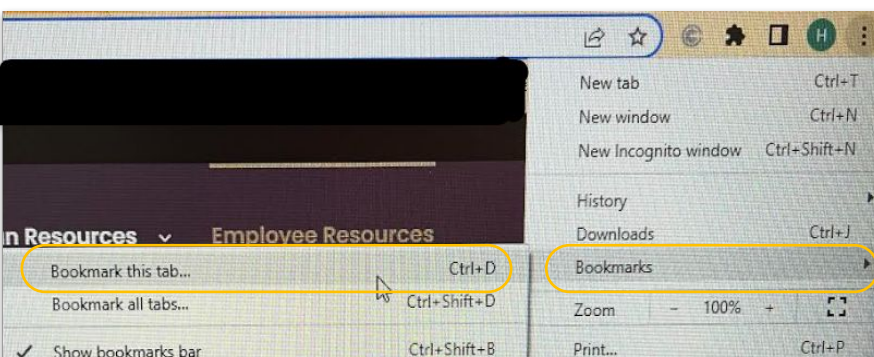
- Email responses for prospects should always be replied back the same day, as soon as possible to make sure we capture this hot lead.
- Begin the email with a “Hi”, or a “Good Morning” and the person’s name.
- All emails should have your signature.
- You should not email any resident, applicants, or prospects via your First Pacific email. All correspondence to residents, prospects, and applicants must be done via CRM IQ.
- Your First Pacific email is for internal and vendor use only.

Sending Screenshots

Every now and then an issue might come up in Yardi that you may need to send screenshots of.

- Have the issue maximized in your screen
- Press the ‘PrtScn’ (Print Screen) button which is typically located on the top right-hand side of the keyboard.
- Go to the email you are composing, right click and click ‘Paste’.
- It might take a couple moments, but your screen shot should appear in the body of your email.

NOTE : You MUST use the internet browser Google Chrome in order for this to work.



You can also bookmark any frequently used page or website such as Facebook, Canva, Criminal search sites, etc. All you need to do is go to the site. Click the three dots in the top right-hand corner, click bookmarks, then bookmark this tab. You can add it to your Show bar by making sure your show bar is checked.



In addition to “PrtScn” you can also use the Snipping Tool which allows you to select a specific part of the screen.

Leasing Training

Before you start | Read through the entire lease and community policies. You **MUST** know the lease and all the addendums inside and out so that you can explain them and understand what your policies are. Please ensure you ask the manager if you are unsure about anything.

- Get to know your property inside out; building numbers, directions, neighborhood, where the closest services are located etc.
- Know your pricing, specials and availability every day.



Watch this

<https://vimeo.com/419071237/2c81fdf7ed>



Phone Technique

- ✓ Smile when you answer the phone, people can hear the difference!
- ✓ Greet with: "Thank you for calling (property), this is (name), how may I help you?"
- ✓ Lead the conversation.
- ✓ Ask the caller their name. Use their name throughout the conversation to be more personable.
- ✓ Paint a picture of your property and units. Use descriptive words like "huge", "spacious", "convenient", "private" etc.
- ✓ Ask prequalifying questions:
 - "What size apartment are you looking for?"
 - "When are you looking to move in?"
 - "Do you have any pets?"
- ✓ Know your unit availability, that way you can give accurate information to the caller.
- ✓ Personalize the call and build rapport with the prospect.
- ✓ Get the caller's phone number.
- ✓ Always attempt to set an appointment to tour.
- ✓ Provide directions to the property.
- ✓ If possible, get the source of their phone call (rent.com, For Rent magazine, etc.)
- ✓ Log the phone call on a phone log or guest card. Do not type while taking the information down.
- ✓ Enter the prospect's information into CRM, always write detailed notes; this should be done as soon as possible.
- ✓ Do not jump into the price right away on the call, even if that is what the caller initially asks. Try to get as much of these other questions answered as possible, and kindly explain if you could just get a few pieces of information you can help find a home that is perfect for them.
- ✓ Record all information and enter into CRM as a guest card.



Leasing Training

Phone Script for Prospect Calls

- The phone script on the next page was designed to help you practice asking all of these important questions on a prospect call.
- Role play with this phone script for practice, and then use it for all calls until you have the questions memorized and the cheat sheet is no longer needed.
- The script can be modified for your personal style and flow, just make sure all aspects are included.
- We use a service that records calls and grades them on the criteria attached below:

Questions	Points Available	Score
1. Initial Greeting		
1. Did Leasing Professional thank the prospect for calling the Property Name?	2	
2. Did Leasing Professional clearly introduce self?	2	
3. Was Leasing Professional enthusiastic?	3	
4. Did Leasing Professional determine the prospect's name? (Full points if prospect volunteers name)	2	
5. Did Leasing Professional ask how the prospect heard about the community?	2	
6. Did Leasing Professional ask for prospect's email address?	5	
7. Did Leasing Professional ask for prospect's phone number?	3	
2. Identifying Prospect Needs		
2. Did Leasing Professional determine the size of apartment needed?	2	
3. Did Leasing Professional determine the prospect's time frame of move?	2	
4. Did Leasing Professional determine the number of people who would be living in the apartment?	2	
5. Did Leasing Professional determine if the prospect has any pets?	2	
6. Did Leasing Professional build product value before quoting the price? (Must give two apartment features for credit)	5	
7. Was Leasing Professional conversational while gathering information?	3	
3. Creating Interest		
1. Did Leasing Professional describe the apartment in a way that gained interest?	4	
2. Did Leasing Professional describe the property and amenities in a way that gained interest?	4	
4. Closing		
1. Did Leasing Professional offer a virtual or in-person tour of the property	5	
2. Did the Leasing Professional inform the prospect they would send an invite to Rent Café?	3	
5. Follow Up		
1. Did Leasing Professional ask if there were any other questions?	2	
2. Did Leasing Professional end the call in a positive way?	2	
3. Did Leasing Professional personalize follow-up correspondence to the prospect?	2	
6. Leasing Professional Impressions		
1. Did Leasing Professional use the prospect's name at least once during the conversation?	2	
2. Did Leasing Professional have good product knowledge?	2	
7. Wow Factor		
1. Was the Leasing Professional actively listening?	2	
2. Did Leasing Professional control the flow of the conversation?	2	
3. Did Leasing Professional Create Urgency?	3	
4. Did Leasing Professional lease a unit to the prospect?	Bonus 5 points	
Total Points Available	68	



Leasing Training

Phone Script for Prospect Calls

Thank you for calling ! _____ My name is _____ How can i help you?

Can I have your name? (First and last for full points) _____

What's a good number for you in case we get disconnected? _____

What's a good email address for me to send a virtual tour and link to rentcafe?

How did you hear about us? _____

What size home are you looking for? _____

Tell me a little bit about what you're looking for in your new home:

How soon do you need it? _____

How many people will be in your home? _____

Do you have any animals? If so what's your animals name? _____

Alloy our homes come with: Paint the picture of the home you' re selling. _____

We also have (mention at least 3 amenities) _____

This sounds like the perfect home for you! Is there anything I can do to get you to lease this home today? I'd hate for you to lose it.

Can you stop by for a tour today? (give 2 available times)

Do have any questions?

Thank you for calling (prospects name)! Please don't hesitate to call me back if you have any other questions. Have a great day!



Call Scoring

01

Each person will be coached on 1 call per qt.. If you score 100%, you'll receive a plaque, \$100 amazon gift card, and company wide recognition. If you score 75% or lower, you will be required to do additional training.

02

The trainer will provide the initial training to anyone who scores 75% or lower.

03

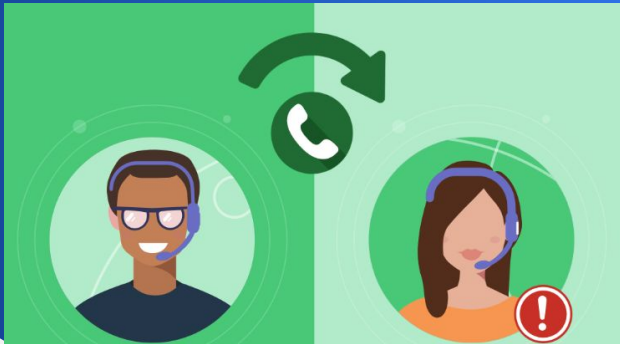
If an employee scores 75% or lower on any call after the initial training, it is the manager's responsibility to provide additional follow up and support to correct performance

04

Managers are responsible to making sure each team member schedules or submits their call by the due date.

Call Transfers in CRM IQ

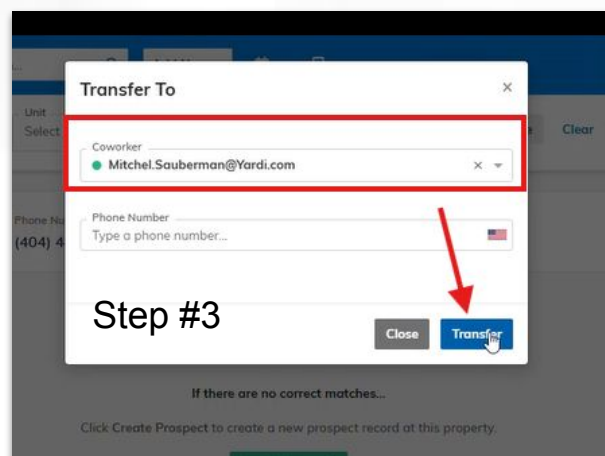
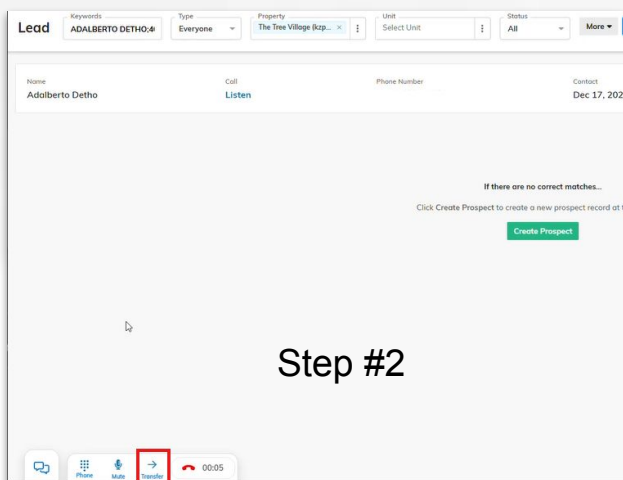
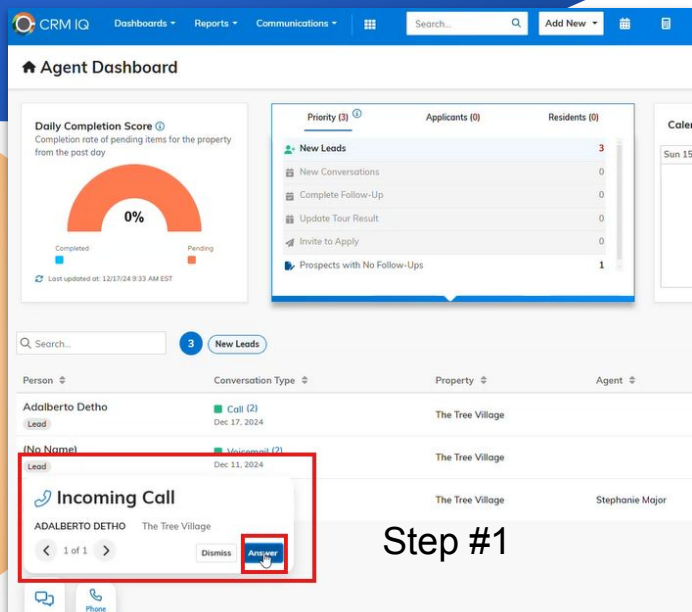
[Click here to watch!](#)



If a call needs to be transferred to a different agent / manager simply answer the call once answered click transfer → Select your agent → click Transfer.

This will send the call directly to the agent.

Note: The agent must be marked as available in IQ.



Leasing Training



Watch this

<https://vimeo.com/367813777>

If your tour is coming in after a phone call and you have the appointment set, make sure you have their guest card ready. Know their name. You have already obtained information to find them a home, now you just need to get the specifics. If they show for their appointment, you are 80% there! They are interested.

If the tour is a new piece of traffic, sit down and fill out a guest card for them. "Interview" the prospect to get enough information to help them find their perfect home. Smile and create positive energy.

Always get a photo ID and note the number on your guest card. Do not make a copy of the ID. We only accept government issued ID's. They must be current, i.e. not expired. Place the ID on your desk while you tour – don't forget to return it!

Lead the tour. Take charge.

Make sure to provide all prospects with the same information. This includes utilities, lease terms, specials and the criteria. **Be aware of fair housing regulations at all times.**

While touring, walk prospects to your amenities. Also show parking options, mailboxes and laundry facilities. Even if you don't show them all of these items (if the amenities are closed), let them know what you have to offer them.

Be creative and ensure we stand out from the 5 other tours they may take that day. Know your key selling points for the property and each apartment.

Walk them through each room and help them visualize their furniture in the home. Refer to the home as theirs.

Mention \$\$\$ and value from the very beginning. Let them know how much it is to make this their home.

Create urgency! Do not tell them you have 10 units available. Get as much information as possible. Listen to your prospects and make sure you know how to respond to all objections. What floor do they prefer? What exposure? By doing this you will narrow down their options and truly only have 1 or 2 units that suits their needs. Use words like "only", "limited", "last one".

Ask for the \$\$\$! Don't be afraid. All they can say is no. Ask them to fill out the application to reserve that apartment just for them.

Assist the prospect in completing an application, use the tablet when possible.



Leasing Training

Follow Up

- Ask the prospect if they would prefer phone or email communication.
- Place a follow up call to the prospect 48 hours after they tour. Make sure to know your current availability before you call again. Create urgency. Ask if they have any other questions. Offer to tour them again or any roommate they may have.
- Thereafter, you should complete all follow-ups scheduled in the queue and continue contact them until you close them or they tell you they found something else. If they rented somewhere else, ask where and why. It is important for us to know if it is a price issue or amenities or whatever other features appealed to them that we may not have had.
- If after a few phone calls they have not rented and still are undecided have your manager call with a follow up and help double close.

Note : Remember to have fun and get to know the prospect. Be genuine and they will feel comfortable with you. Be energetic and positive!

Holding Homes

After the move-out day you may only hold a home for ___ days and then the new resident needs to take possession. If the home is already vacant, then they must take possession of the home immediately after they get approved and sign the lease. By taking possession they do not have to physically move-in, however their lease would start this day and they begin paying this day. In all other situations the waitlist option should be utilized until a home is available for them. The goal is to have move-ins happen as soon as possible after the home is "made-ready". Please contact your Regional Manager if you have any questions.

Leasing Workflow Policies

- No paper Payments are accepted. Must pay online or using a credit or debit card.
- Credit card / debit card fees are waived on application charges but not on move in costs.
- Queue must be completed each day before leaving. Work on Unassigned, then My Queue, then Community Queue to make sure all follow up is completed. Reach out to your Regional Manager if you need assistance completing your queue.
- Leases for new move ins are to be generated no more than 3 days in advance and should be countersigned no less than 2 days prior to move in.
- We do not have Occupants. All applicants will be lease holders.
- Market Survey to be completed every weekly on Monday's.

First Pacific University

To access Yardi eLearning | First Pacific University

Click YardiOne to find the FP University. Once you click the FP university icon it will automatically sign you in.



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To access Yardi eLearning | First Pacific University

01

Once logged in, you will be directed to your Dashboard. This will show any Announcements, Assignments or Events as well as Courses, Learning Plans, Videos or Resources available to you.


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DASHBOARD
MY TRAINING
CATALOG






Visit SuperAdmin Mode


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Haley Cornish
 7 Badges



2 Items need your attention



CONTINUE LEARNING



AO 395 - 1099 Process in Voyager 75

0 %



PD 120 - Time Management Module 1: What are the Benefits?

37 %

ANNOUNCEMENTS
0

ASSIGNMENTS
72

RESOURCE

December 2024

<

>

Mon	Tue	Wed	Thu	Fri
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31	1	2	3
6	7	8	9	10

02

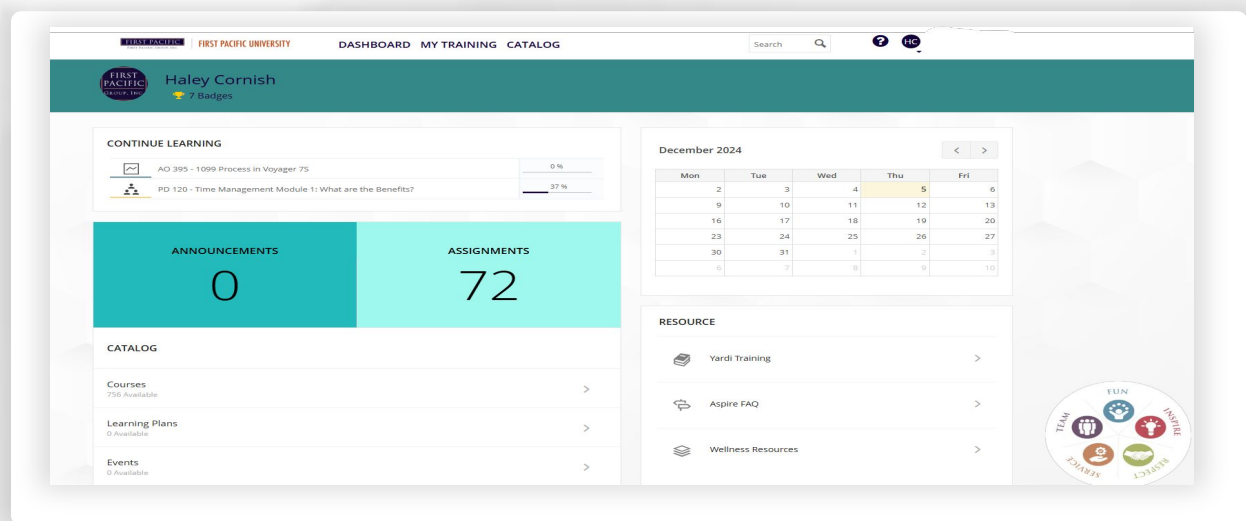
In the upper right-hand corner if you hover over your Initials, you can click My Profile to update your personal information including uploading a profile photo or click Transcript for a list of courses completed for a period of time.

03

By clicking on the Courses link under the Catalog, you can add courses you would like to take at any time.

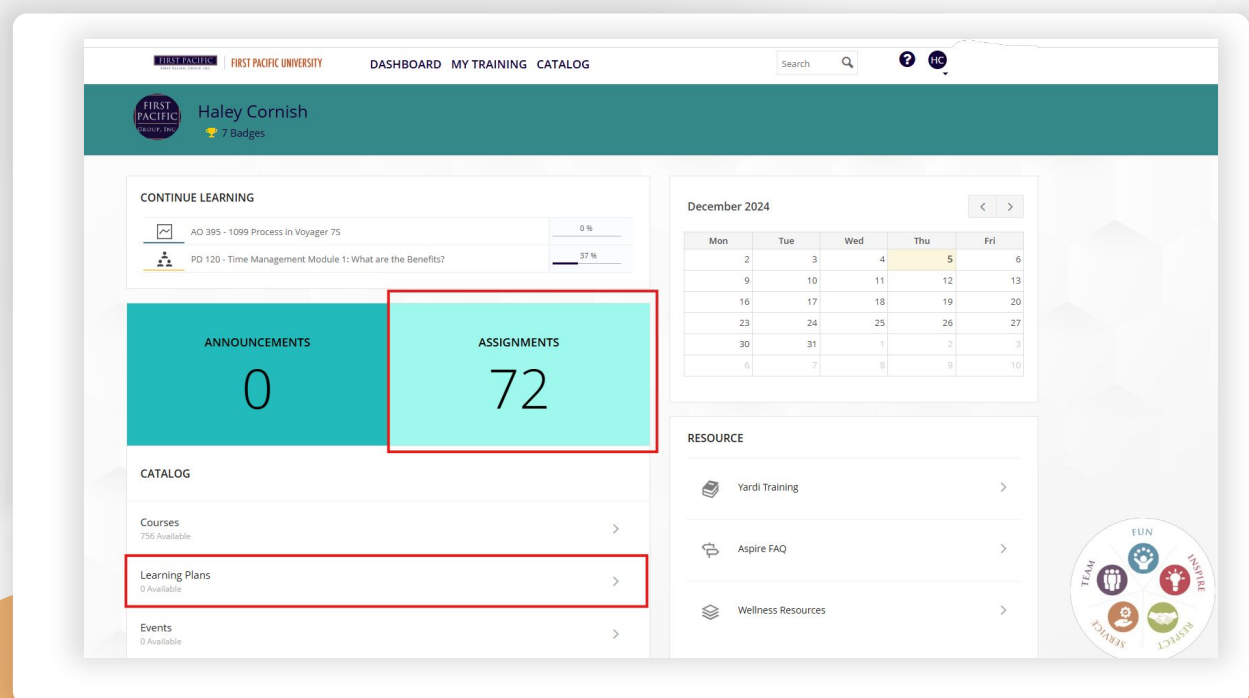
First Pacific University

From the Dashboard, click Assignments.



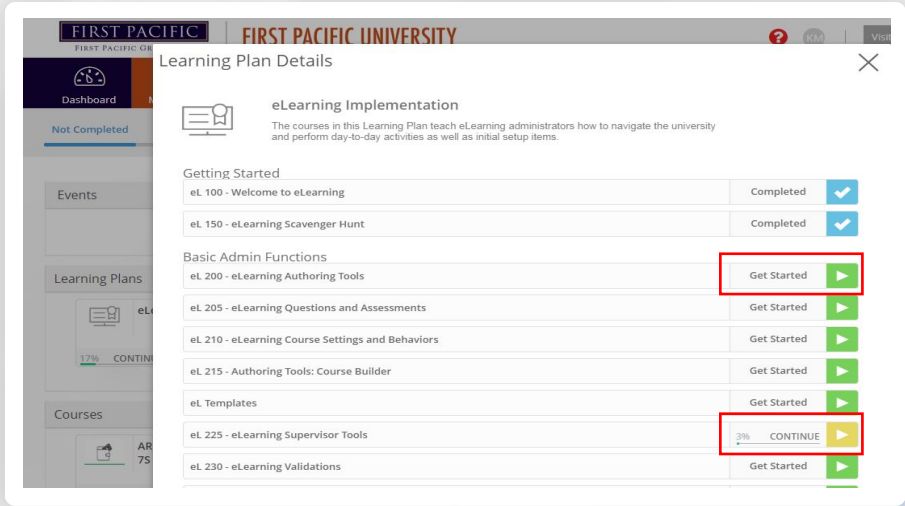
01

This will show any Learning Plans or Courses you have been assigned. Click on the Learning Plan or Course you wish to start or continue.



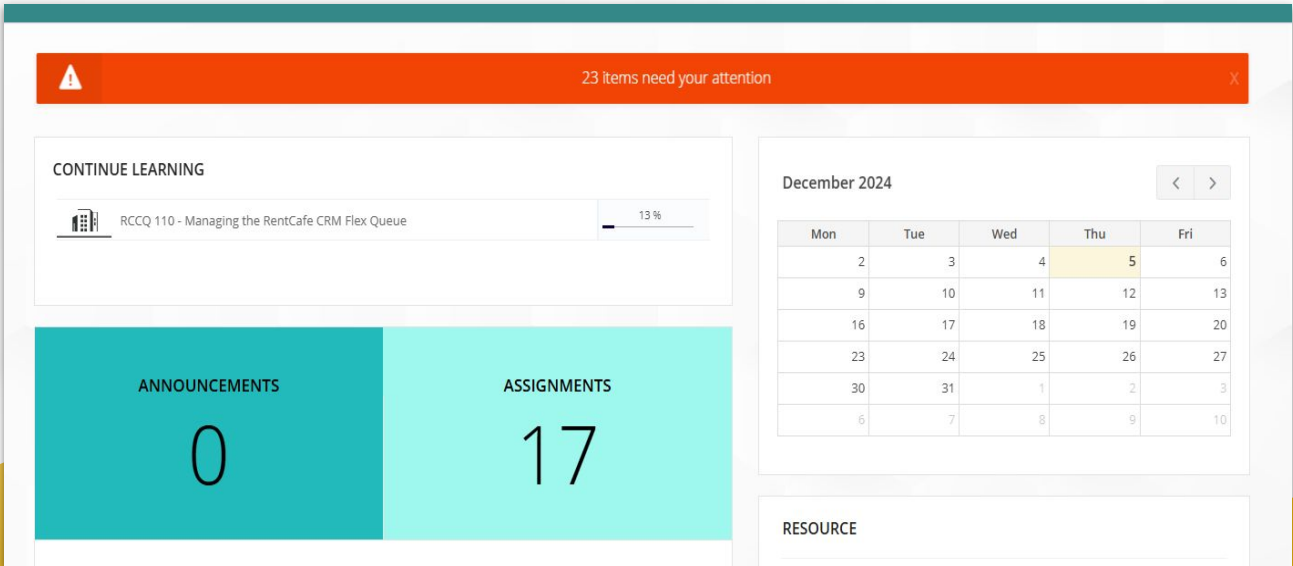
First Pacific University

From the Dashboard, click Assignments.



The Learning Plan will bring up a new window showing all courses in the plan. Click the Get Started button next to the course you wish to start or the Continue button next to the course you wish to continue.

- Once a course is completed, you will see Completed next to it.
- If you have items past due or that need your attention, there will be a banner message on the Dashboard. Click on the Banner and it will show what is Pending.





SHOPPING YOUR COMPS



01

It is very important that you shop your top three to five competitors within the first week of starting work at your property.

02

This is important for you to understand the area and what other sites have to offer.

03

It is also a way to figure out unique ways to market and lease your property by seeing what you can offer that others can't.

04

It might be helpful to review the shopping report to have some ideas of what to look for. You will also need to complete the Comp Shop checklist for each site and send to your manager/regional manager.

Shopping Your Comps

Comp shop Checklist to bring with you and complete right after your shop.

First Pacific Onsite Evaluation

First Pacific Onsite Evaluation	
Greeting	
1. Did the Leasing Professional acknowledge you immediately, stand and greet you with a smile and shake your hand?	() Yes () No (0)
<i>If no, tell us what happened. Did they remain seated, were they busy with a resident, etc?</i>	
2. Did the Leasing Professional introduce themselves?	() Yes () No (0)
3. Was the Leasing Professional dressed professionally?	() Yes () No (0)
<i>If no, a comment is required.</i>	
5. Did the Leasing Professional ask your name?	() Yes () No (0)
<i>If no, a comment is required.</i>	
Information Gathering	
Did the Leasing Professional complete a guest card?	() Yes () No
Did the Leasing Specialist ask enough questions to determine your needs and wants?	() Yes () No
Did the Leasing Specialist offer refreshments?	() Yes () No
Did the Leasing Specialist create urgency and build value before touring?	() Yes () No
CURB APPEAL	
Was the property free of trash and looked clean?	
Was the signage clean & Updated?	
Was the path to the office clearly marked?	
What amenities did you tour?	
<i>If no, a comment is required.</i>	
Demonstration	
13. Did the Leasing Professional take control of the leasing visit?	() Yes () No
<i>If no, a comment is required.</i>	
14. Did the Leasing Professional try to build rapport as you walked to the show unit?	[] N/A () Yes () No
<i>If no, a comment is required. Please select N/A, only if there is no availability or tour.</i>	
15. Did the Leasing Professional keep your needs in mind when demonstrating the apartment?	[] N/A () Yes () No

Shopping Your Comps

Once complete with this form, scan and email it to your Manager & Regional.

Once complete with this form, scan and email it to your Manager & Regional.

<i>Please select N/A, only if there was no availability or tour. If no, what was lacking in the demonstration?</i>	
16. Did the Leasing Professional discuss the benefits of living in the area?	☐ Yes ☐ No
<i>What were the benefits mentioned? This will help the client understand the type of information the Leasing Professional is sharing with real prospects.</i>	
17. Did the Leasing Professional show the property & amenities based on the features in which you expressed interest?	☐ Yes ☐ No
<i>If no, comment required.. Did the Leasing Professional talk about the amenities but not show them? Did they not ask about your preferences, etc?</i>	
☐ N/A ☐ Yes ☐ No (0)	
<i>If no, comment required. Choose N/A only if there was no availability.</i>	
19. Did the Leasing Professional discuss the features and benefits of the apartment you were shown and relate them to your needs?	☐ N/A ☐ Yes ☐ No
<i>Choose N/A only if there was no availability. .If yes, what were the benefits mentioned? This will help the client understand the type of information the Leasing Professional is sharing.</i>	
20. Did the Leasing Professional show a clean, made ready & comfortable apartment?	☐ N/A ☐ Yes ☐ No
<i>If no, comment required. Choose N/A onlyif there was no availability.</i>	
List the top 5 things the agent did that were impressive	☐ N/A ☐ Yes ☐ No
List 3 things that you did not care for of the agent or property?	
Fair Housing	
24. Did the Leasing Professional say or do anything that could have been perceived as discriminatory?	☐ Yes (0) ☐ No (1)
26. When you asked about crime at the community, what did the Leasing Professional say?	
Closing	
27. Did the Leasing Professional discuss pricing and related costs only after building value in the apartment and/or community?	☐ Yes ☐ No
<i>If no, comment required.</i>	

Shopping Your Comps

Fair Housing

29. Did the Leasing Professional attempt to overcome and address your concerns or objections?	☐ N/A ☐ Yes ☐ No
<i>Choose N/A, only if there was no availability. You must state an objection unless there was no availability. Please detail what objection/concern you expressed and how the Leasing Professional overcame or did not overcome it.</i>	
30. Did the Leasing Professional ask closing questions during the tour? For example: "Can you see yourself cooking in this great kitchen?"	☐ N/A ☐ Yes ☐ No
<i>Choose N/A only if there was no availability and no tour.</i>	
31. Did the Leasing Professional encourage you to complete an application?	☐ Yes ☐ No
34. BASED ON THE LEASING PROFESSIONAL'S PRESENTATION - (NOT YOUR PERSONAL PREFERENCES OR THE CONDITION OF THE PROPERTY), would you have leased an apartment at this community, or if nothing was available, be interested in coming back to see an apartment at a later date?	☐ Yes ☐ No
<i>If no, comment required.</i>	
How many times did the Leasing Professional attempt to close?	☐ Once ☐ Twice ☐ Three Times ☐ The Leasing Professional Did Not Attempt To Close (0)
Follow Up	
36. Did you receive a follow-up call or email within two business days?	☐ Yes ☐ No
Leasing Professional Perception	

Shopping Your Comps

Once complete with this form, scan and email it to your Manager & Regional.

Narrative	
Describe your experience in detail.	
Please provide a 2 paragraph description of your visit from beginning to end.	
Special Data	
Person Shopped	
Enter the name of the Leasing Professional.	
EID	
Shopper's First and Last Name.	
INTERIOR ASSESSMENT	
Sample Comment Text (Click to enter comment text)	
Was the management office clean and organized?	☐ Yes ☐ No
Was the apartment or model shown neat and clean?	☐ Yes ☐ No
Proof of Visit	
Please upload the Leasing Professional's business card and/or brochure and picture of the community here:	

Every Prospect Could be A shopper Always give 100%

Below is the scoring guide for secret shops :



Performance by Question		
Sections/Questions	Current 2-2018 First Pacific	Overall
Greeting	100.0%	100.0%
Did the Leasing Professional acknowledge you immediately, stand and greet you with a smile and shake your hand?	3/3	100.0%
Did the Leasing Professional introduce themselves?	2/2	100.0%
Was the Leasing Professional dressed professionally?	2/2	100.0%
Was the Leasing Professional wearing a name tag?	1/1	100.0%
Did the Leasing Professional ask your name?	2/2	100.0%
Information Gathering	100.0%	100.0%
Did the Leasing Professional complete the guest card (or pull out the card from the phone call) by asking questions in a conversational manner?	4/4	100.0%
Did the Leasing Professional obtain the following contact information:	2/2	100.0%
Did the Leasing Professional ask specifically for an email address or contact information for follow-up?	1/1	100.0%
Did the Leasing Professional ask why you were moving?	1/1	100.0%
Did the Leasing Professional try to determine the features in which you were interested?	3/3	100.0%
Did the Leasing Professional use your name during the conversation?	1/1	100.0%
Did the Leasing Professional communicate with you in a positive, conversational manner?	3/3	100.0%
Demonstration	100.0%	100.0%
Did the Leasing Professional take control of the leasing visit?	2/2	100.0%
Did the Leasing Professional try to build rapport as you walked to the show unit?	2/2	100.0%
Did the Leasing Professional keep your needs in mind when demonstrating the apartment?	2/2	100.0%
Did the Leasing Professional discuss the benefits of living in the area?	1/1	100.0%
Did the Leasing Professional show the property & amenities based on the features in which you expressed interest?	5/5	100.0%
Did the Leasing Professional show the size of the apartment you requested?	1/1	100.0%
Did the Leasing Professional discuss the features and benefits of the apartment you were shown and relate them to your needs?	2/2	100.0%
Did the Leasing Professional show a clean, made ready & comfortable apartment?	3/3	100.0%
Did the Leasing Professional encourage you to participate in the demonstration?	2/2	100.0%
Did the Leasing Professional discuss the professionalism and benefits of the onsite staff and/or management company?	2/2	100.0%
Did the Leasing Professional discuss the benefits/cost savings of intangible items such as water included, utility connections, energy savings, valet, trash, etc?	2/2	100.0%
Fair Housing	100.0%	100.0%
Did the Leasing Professional say or do anything that could have been perceived as discriminatory?	1/1	100.0%
Did the Leasing Professional answer correctly when you asked, "What kind of people live there?" Or "Do a lot of [kids / old people / people of a certain race] live there?"	2/2	100.0%

Closing	100.0%	100.0%
Did the Leasing Professional discuss pricing and related costs only after building value in the apartment and/or community?	2/2	100.0%
Did the Leasing Professional create a sense of urgency to lease the apartment?	3/3	100.0%
Did the Leasing Professional attempt to overcome and address your concerns or objections?	2/2	100.0%
Did the Leasing Professional ask closing questions during the tour? For example: "Can you see yourself cooking in this great kitchen?"	3/3	100.0%
Did the Leasing Professional encourage you to complete an application?	6/6	100.0%
Did the Leasing Professional attempt to close more than once?	4/4	100.0%
Did the Leasing Professional make you feel welcome and that they desired for you to live at the community?	3/3	100.0%
BASED ON THE LEASING PROFESSIONAL'S PRESENTATION - (NOT YOUR PERSONAL PREFERENCES OR THE CONDITION OF THE PROPERTY), would you have leased an apartment at this community, or if nothing was available, be interested in coming back to see an apartment at a later date?	6/6	100.0%
Follow Up	100.0%	100.0%
Did you receive a follow-up call or email within two business days?	3/3	100.0%
Did you receive a second follow up (thank you card, email or phone call) within three to five business days?	3/3	100.0%
Leasing Professional Perception	100.0%	100.0%
How would you rate the enthusiasm of the Leasing Professional?	3/3	100.0%
How would you rate the product knowledge of the Leasing Professional?	3/3	100.0%
How would you rate the Professionalism of the Leasing Professional?	3/3	100.0%
Was the Leasing Professional genuine, warm and friendly?	3/3	100.0%
How would you rate the Leasing Professional's sales ability?	3/3	100.0%

Posting On Facebook

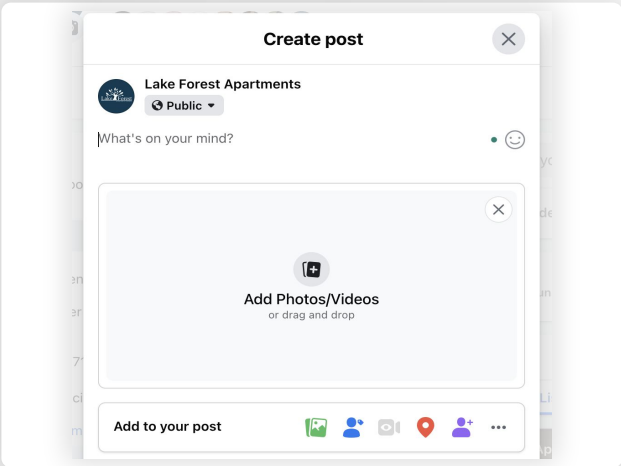
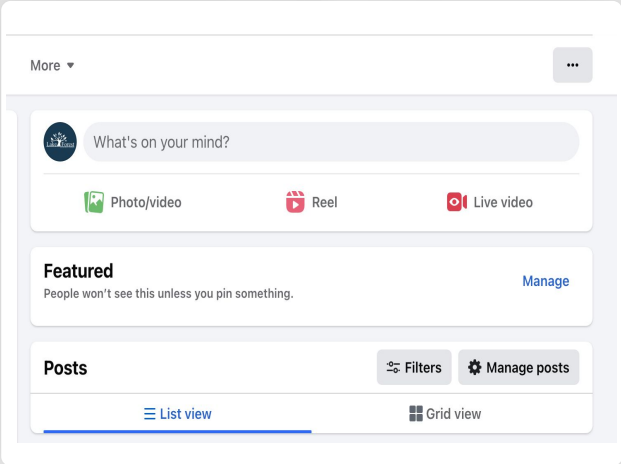


Watch this

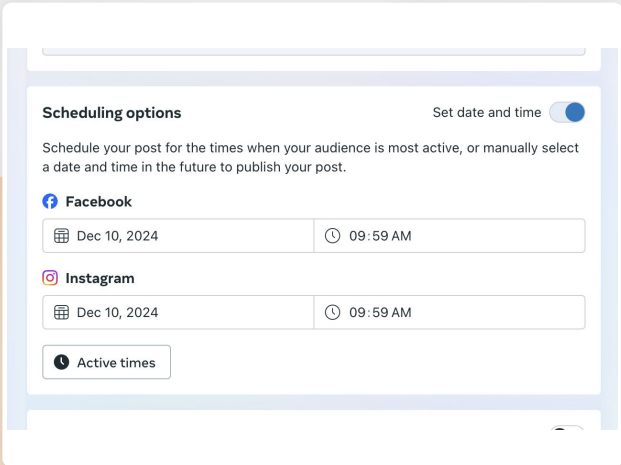
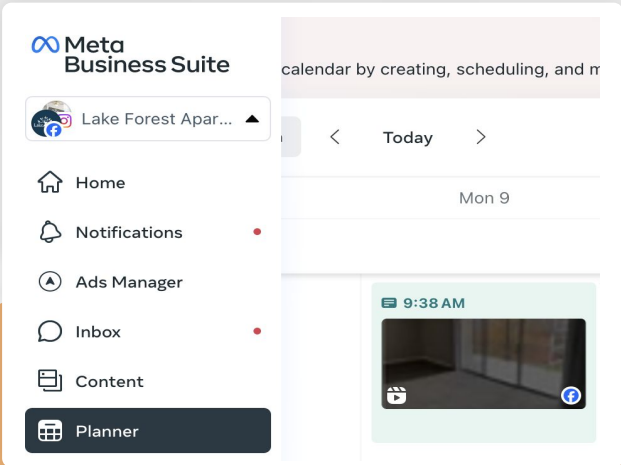
<https://vimeo.com/578048373/6928802057>



1. Sign into Facebook and go to your homepage.
2. Choose one of the post options or click "What's on your mind?..." to begin your post.
3. Create a post with text, pictures, and/or video. You can drag and drop pictures from your desktop for convenience.

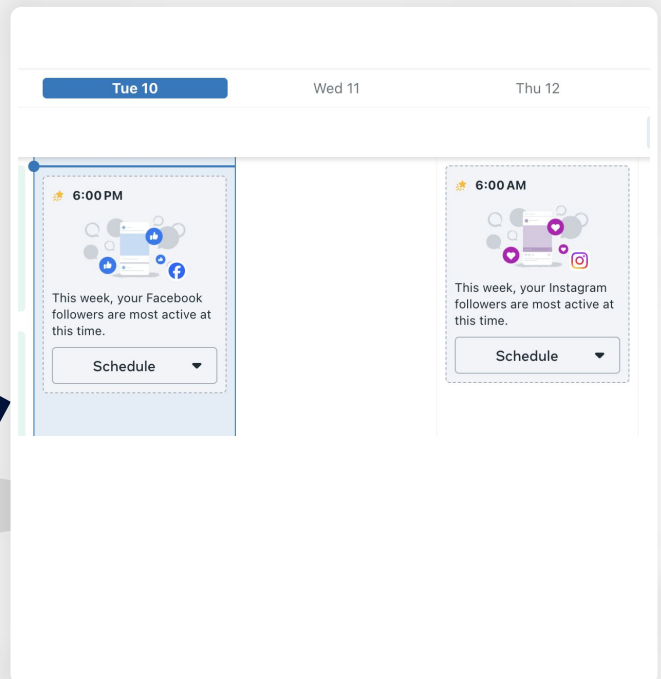


4. To schedule a post, Go to Meta Business Suite and select 'Planner'.
5. Option to schedule, backdate, or save a draft of your post. click "Create Post" in the upper left corner.
5. After creating your post, scroll down and click on the scheduling options. Select the date and time you want it to be published. Once you've double-checked everything, click 'Schedule'

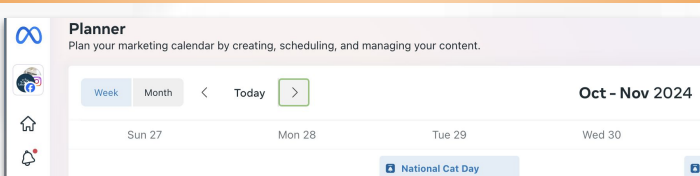
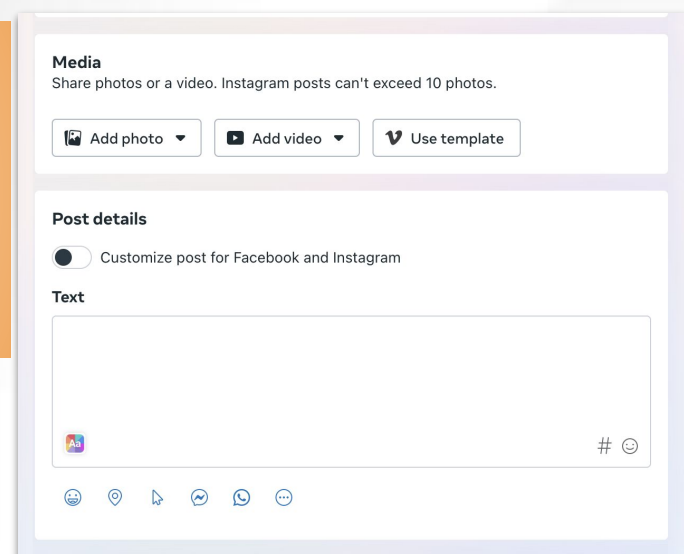




Posting On Facebook



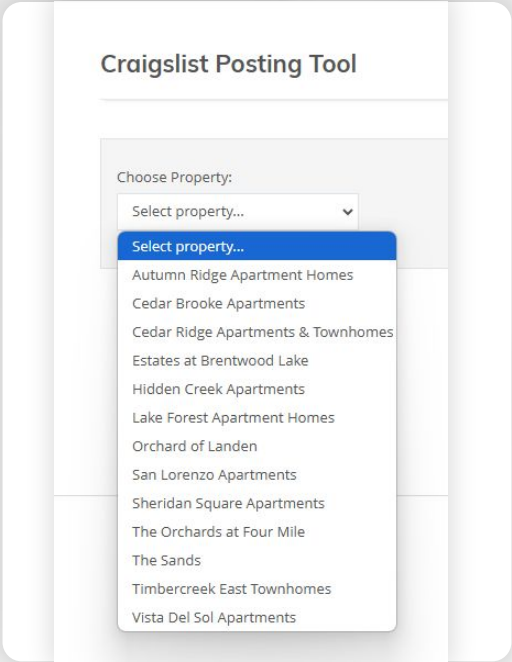
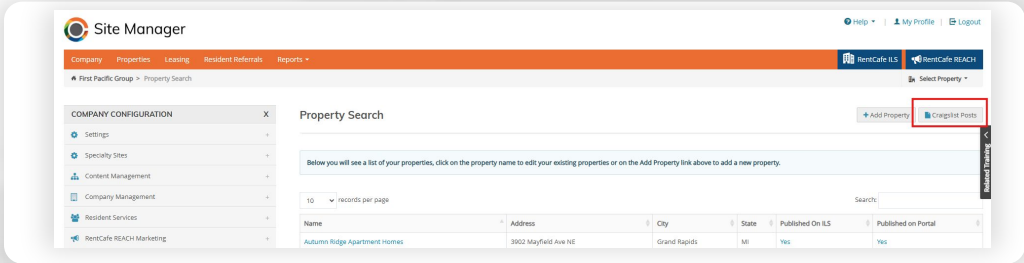
To view or edit your scheduled posts, go to the Planner in Meta Business Suite. There, you can see when your audience is most active and review insights from your previous posts.



Rent Café Site Manager

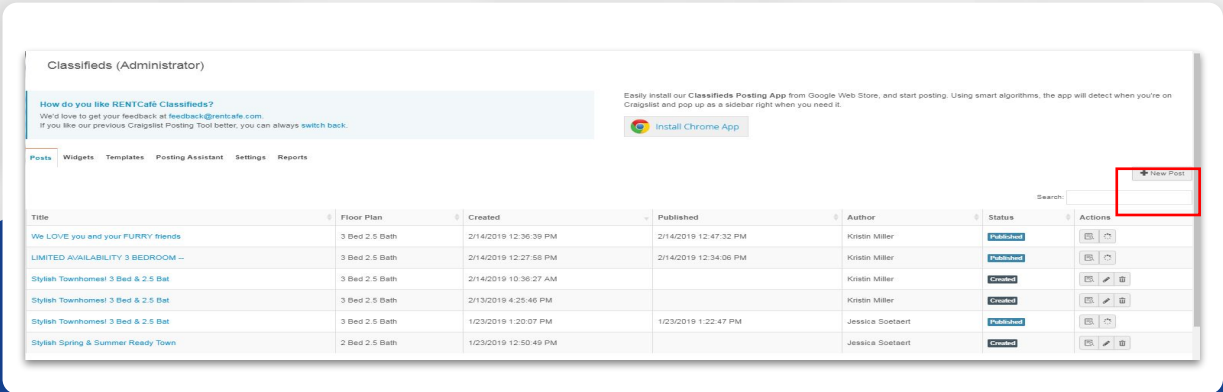
Posting on Craigslist Classifieds

Open Site Manager and click Craigslist Posts



Click the **Choose Property** dropdown to choose your **Property**.

The Classifieds Posting screen will come up. Click **+New Post**.



Rent Café Site Manager

Posting on Craigslist Classifieds

On the Setup screen, you will click on the Floor Plan you are trying to advertise. Once you select a specific floor plan. If you are not wanting to advertise a specific floor plan, you will click the Skip Floor Plan icon.

Copy the email address under Reply Email and save it somewhere that you can easily Access it.

***DO NOT** change the Reply Phone or Reply Email information as these are tracking sources specific to Craigslist.

Floor Plan Options:



Skip Floor Plan 2 Bed 2.5 Bath 2 Bed 2.5 Bath 3 Bed 2.5 Bath 3 Bed 2.5 Bath

Select Apartment:

1544

Note: Leave the below fields blank to use the phone number and email address specified on the Classifieds Settings page.

Reply Phone: (833) 340-5427

Reply Email: TimbercreekEastTownhomes.Craig

Cancel Continue

This will bring you to the Classified Templates screen. Click the Check Mark of the Template you want to use for your posting. Click Continue.

1 Setup 2 Template 3 Customize 4 Confirmation

Classified Templates

Sort by: Last Posted Date Descending

Grid View List View

Default Last Used: 3/25/2019 Default System Template TEMPLATE WIDGETS: ✓	Furry Friends Focused Last Used: 2/14/2019 TEMPLATE WIDGETS: ✓	3 bed Limited Availability Last Used: 2/14/2019 TEMPLATE WIDGETS: ✓	2 Bedroom Limited Availability Never been posted TEMPLATE WIDGETS: ✓	Default 2 Never been posted TEMPLATE WIDGETS: ✓
Default 3 Never been posted TEMPLATE WIDGETS: ✓	Finally, this is what you Never been posted TEMPLATE WIDGETS: ✓	Love Living Here Never been posted TEMPLATE WIDGETS: ✓		

Cancel Back Continue

Posting on Craigslist Classifieds

Depending on the Template chosen, you will need to enter a Title, add photos and select the content.

Click in the **Title** box and type your catchy title.



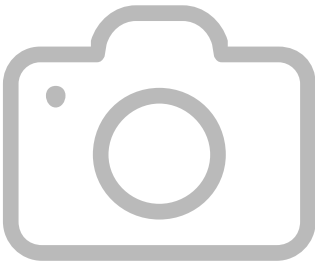
Posts Widgets Templates Posting Assistant Settings Reports

Add New Craigslist Post

1 Setup 2 Template 3 Customize 4 Confirmation

Enter Title

Leave Click to add photos **blank**



Click to add photos

Rent Café Site Manager

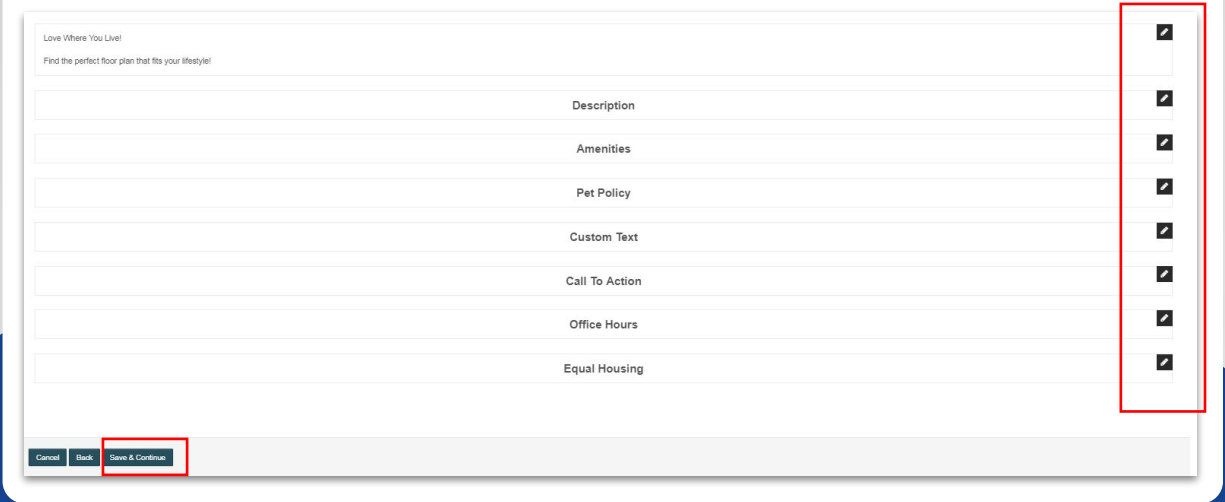
Posting on Craigslist Classifieds

Next, you will click on the Pencil under each Widget to select a version of the widget to use in the post.



Click on the Widget to preview the content and choose the one you want for your post.

Click Select **This Widget**.
Complete the Widgets for the remaining sections and then click **Save & Continue**.



Rent Café Site Manager

Posting on Craigslist Classifieds

The next screen will show a **Preview** of the posting. Copy the full body of the AD, then click **Continue to Craigslist**.

*NOTE

You must have the Craigslist Chrome Extension Installed to Continue to Craigslist.

We can't wait for you to call this 1 bedroom your home!



402 NW Sheridan Road
Lawton, OK 73505

Cats are OK - purr
Dogs are OK - woof

Sheridan Square Apartments
402 NW Sheridan Road
Lawton, OK 73505

Phone: (833) 830-9109
Url: <http://www.sheridan-square.com/?ref=a25114cfaf4ae0b8a9b4b37c8a2aa801>

WHY YOU'LL LOVE CALLING SHERIDAN SQUARE "HOME"
Community Amenities
Online Payments Available • Free Tennis Court & Racket Rentals • Relaxing, Park-Like Setting • Hibachi Grill Area • Business Center • Gift Wrapping Station • Preventative Pest Program • Private Balconies and Patios • 24-hour Emergency Maintenance Team • Community Dog Park • Exciting Resident Events • Valet Trash Service • 24-hour Fitness Center with Cable TV • Free WiFi in Office Common Areas • Large 24-hour Laundry Center • Courtesy Patrol • Package Receiving • Fun-Filled Playground • Year-Round Heated Spa • Shimmering Pool with Shaded Sundeck Area

Amenities
Diamond Upgrade • Central Heat & AC* • Cable and Internet Ready • Fully Appliance, All Electric Kitchens • Beautifully Furnished Homes Available* • Modern Features • Easy Load Dishwashers • Garbage Disposals • Tons of Cabinet Storage • Cozy Wood Fireplaces* • Spacious Closets • Washers and Dryers**In select apartments

Mon-Fri: 8:30AM-5:30PM
Saturday: 9AM-5PM

Pets - allowed, One time Fee \$250.00 Comments: We are pet friendly! 2 pets per apartment home with applicable deposits/pet fees.

[Delete](#) [Back](#) [Continue to Craigslist](#)

You **WILL NOT** log in to any accounts throughout this process. Click on the **City/Area** you are wanting to post to. Click **Continue**.

CL [log in] [create account]



please limit each posting to a single area and category, once per 48 hours

Please select desired location.

which city / area would you like to post to?
kansas city, MO

continue

Rent Café Site Manager

Posting on Craigslist Classifieds

Click the **Housing Offered** button and then click **Continue**.

CL kansas city > housing > apts/housing for rent >

RENTCafé CLASSIFIEDS

Please select "housing offered".

please limit each posting to a single area and category, once per 48 hours

what type of posting is this: (see [prohibited](#) list before posting.)

- ☐ job offered
- ☐ gig offered (i'm hiring for a short-term, small or odd job)
- ☐ resume / job wanted
- ☒ housing offered
- ☐ housing wanted
- ☐ for sale by owner
- ☐ for sale by dealer
- ☐ wanted by owner
- ☐ wanted by dealer
- ☐ service offered
- ☐ community
- ☐ event / class

continue

Click **Apts/housing for rent** button and then click **Continue**.

CL kansas city > housing > apts/housing for rent >

RENTCafé CLASSIFIEDS

Please select "apts/housing for rent".

please choose a category: (see [prohibited](#) list before posting.)

- ☐ rooms & shares
- ☒ apts/housing for rent (no shares, roommates, or sublets please!)
- ☐ housing swap
- ☐ office & commercial
- ☐ parking & storage
- ☐ real estate - by broker
- ☐ real estate - by owner
- ☐ sublets & temporary
- ☐ vacation rentals

continue

Your AD will be blank and will need to be

[Discrimination by race/origin_age_family_status \('no kids' 'ideal for one'\)_disability_creed_sexual_orientation_or_income_source is illegal under fair housing law. Describe premises_not people.](#)

posting title city or neighborhood postal code

description

posting details

rent S O

housing type apartment

laundry

parking

bedrooms

bathrooms

flooring

rent period

☐ cats ok

☐ dogs ok

☐ furnished

☐ no smoking

☐ wheelchair accessible

☐ air conditioning

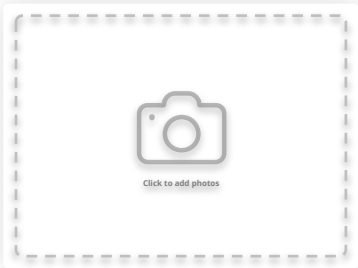
☐ EV charging

Rent Café Site Manager

Posting on Craigslist Classifieds

Copy the entire body of your AD

We can't wait for you to call this 1 bedroom your home!



402 NW Sheridan Road
Lawton, OK 73505

Cats are OK - purrr
Dogs are OK - woof

Sheridan Square Apartments
402 NW Sheridan Road
Lawton, OK 73505

Phone: (833) 830-9109

Url: <http://www.sheridan-square.com/t/ad?ref=a25114cfaf4ae0b6a9b4b37c8a2aa801>

WHY YOU'LL LOVE CALLING SHERIDAN SQUARE "HOME"

Community Amenities

Online Payments Available • Free Tennis Court & Racket Rentals • Relaxing, Park-Like Setting • Hibachi Grill Area • Business Center • Gift Wrapping Station • Preventative Pest Program • Private Balconies and Patios • 24-hour Emergency Maintenance Team • Community Dog Park • Exciting Resident Events • Valet Trash Service • 24-hour Fitness Center with Cable TV • Free Wifi in Office Common Areas • Large 24-hour Laundry Center • Courtesy Patrol • Package Receiving • Fun-Filled Playground • Year-Round Heated Spa • Shimmering Pool with Shaded Sundeck Area

Amenities

Diamond Upgrade • Central Heat & AC* • Cable and Internet Ready • Fully Appliance, All Electric Kitchens • Beautifully Furnished Homes Available* • Modern Features • Easy Load Dishwashers • Garbage Disposals • Tons of Cabinet Storage • Cozy Wood Fireplaces* • Spacious Closets • Washers and Dryers**In select apartments

Mon-Fri: 8:30AM-5:30PM

Saturday: 9AM-5PM

Pets - allowed, One time Fee \$250.00 Comments: We are pet friendly! 2 pets per apartment home with applicable deposits/pet fees.

[Continue to Craigslist](#)

[Continue to Kijiji](#)

Rent Café Site Manager

Posting on Craigslist Classifieds

Paste the body into the blank add then paste or retype the title into posting title and enter the zip code.

posting title

We can't wait for you to call this 1 bedroom your ho

city or neighborhood

postal code

73505

description

Cabinet Storage • Cozy Wood Fireplaces* • Spacious Closets • Washers and Dryers**In select apartments

Mon-Fri: 8:30AM-5:30PM
Saturday: 9AM-5PM

Pets - allowed, One time Fee \$250.00 Comments: We are pet friendly! 2 pets per apartment home with applicable deposits/pet fees.



FIRST PACIFIC GROUP, INC.

Rent Café Site Manager

Posting on Craigslist Classifieds

Scroll to the Posting Details section to enter or update the additional details in the drop down menus (Housing Type, Laundry, Parking, Bedrooms, Bathrooms, Furnished, Available On Date and Open House Dates if applicable).

posting details

rent
\$ 995

sqft
1245

housing type
apartment

laundry
-

parking
-

bedrooms
0

bathrooms
-

☒ cats ok
☒ dogs ok
☐ furnished
☐ no smoking
☐ wheelchair accessible

available on
select date

open house dates
-
-
-

In the **Contact Info** section, check the **By Phone** and **By Text** boxes.

contact info

TimbercreekEastTownhomes.Craigslist.FPG@aptleasing.info

email privacy options [\[?\]](#)
☒ CL mail relay (recommended)
☐ show my real email address
☐ no replies to this email

users can also contact me:
☒ by phone ☒ by text

phone number
(833) 340-5427

extension

contact name

In the **Location Info** section, type in the **Street Address**, **Cross Street** and **City** of your property. In the **Copyright Assignment** section, check the box and enter **Your Name** and **Country of Residence**. Click **Continue**.

location info

street
1860 SE Timbercreek Ct

cross street
40 Highway

city
Blue Springs

☐ ok for others to contact you about other services, products or commercial interests

☒ help us deter unauthorized commercial use of craigslist postings - assign copyright in this post to craigslist and receive unlimited license to reuse it elsewhere as you please.

your name
Kristin Miller

country of residence
USA

continue

Page | 39

Rent Café Site Manager

Posting on Craigslist Classifieds

Confirm your location pin is at the correct place on the Map. Click Continue.

Confirm your location pin is at the correct place on the Map. Click **Continue**.

street

1860 SE Timbercreek C

cross street

40 Highway

city

Blue Springs

postal code

64014

find

+

-

Your post will appear here on maps.
Drag pin or click map to choose exact location.
Press **find** to locate address on map.

Engel Drive

Willow Drive

Northwest Michael

Northwest Jackie

Northwest Lindsey

© craigslist - Map data © OpenStreetMap

continue

The next step is to download the Images from a designated area in your folder. Click on the add images.

rent >

[logged in as TimbercreekEastTown]

this posting has 0 images, of a maximum 24
upload best image first - it will be featured.

Add Images

You can also drop image files here to upload them

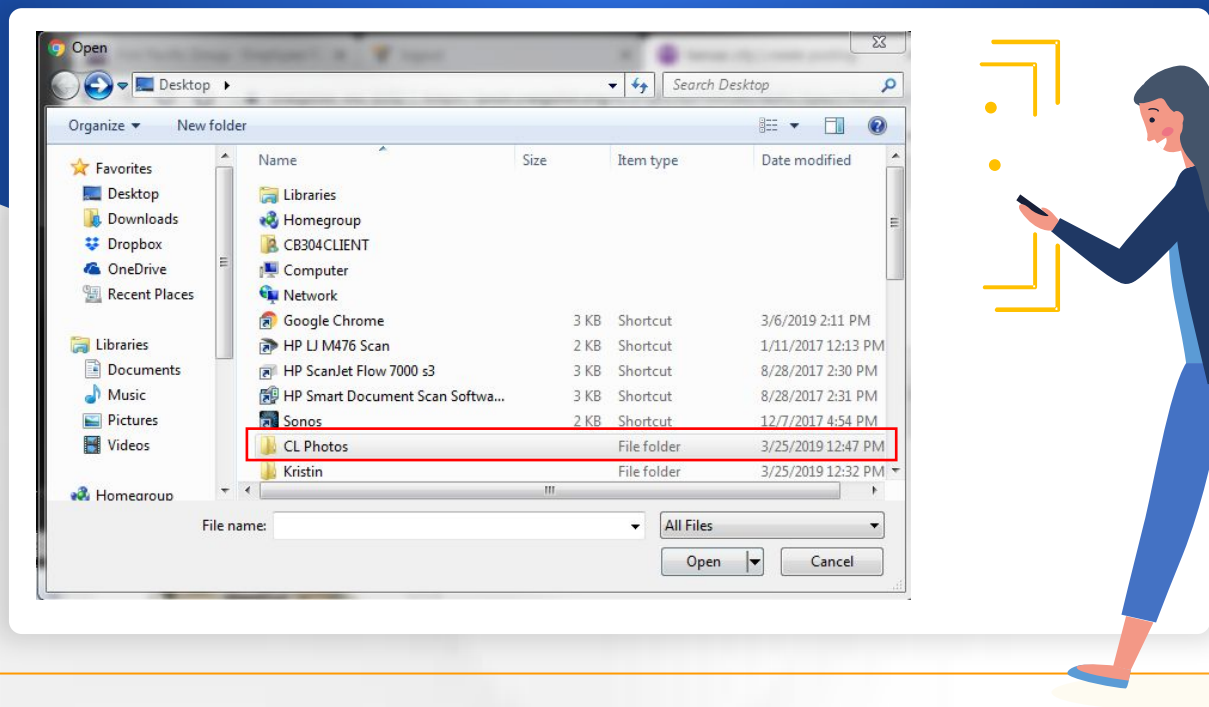
[Use classic image uploader](#)

done with images

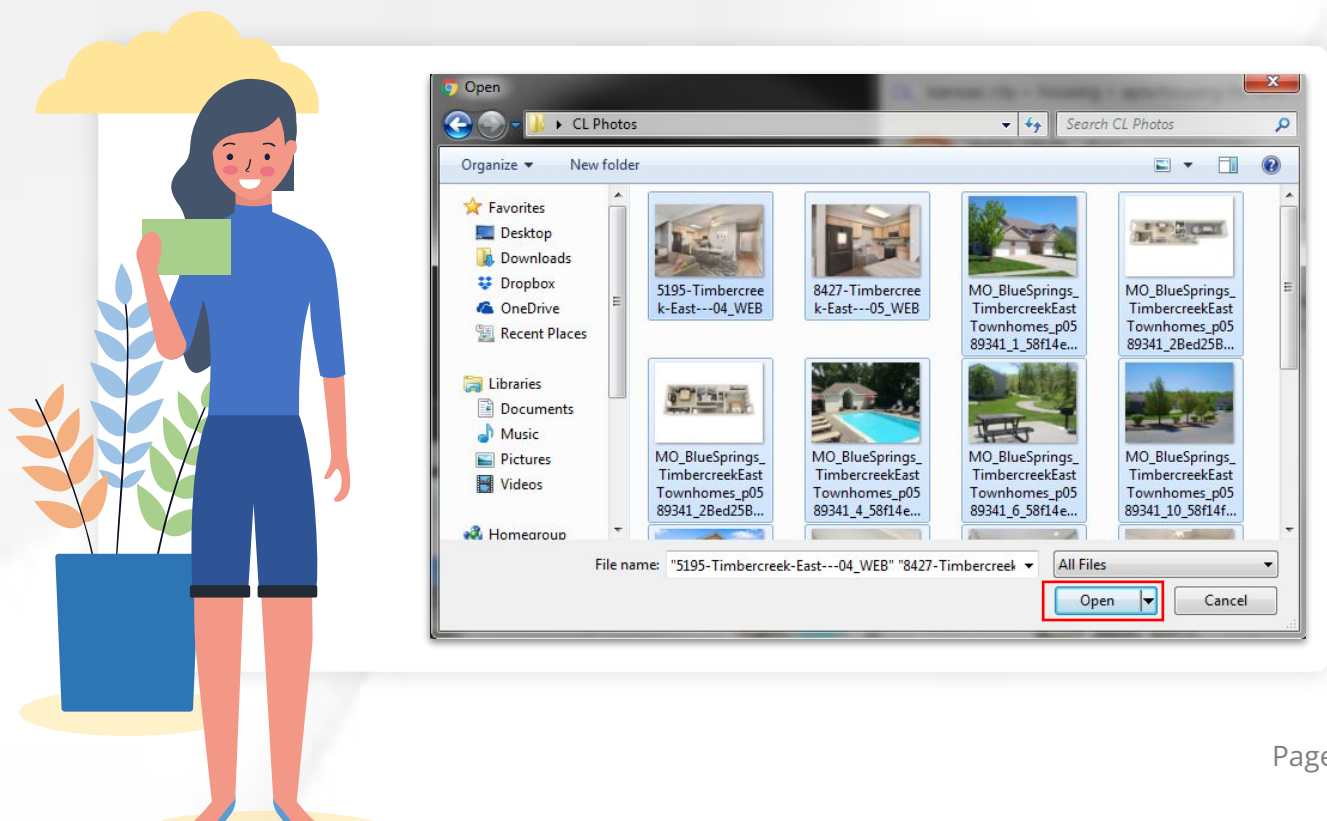
Rent Café Site Manager

Posting on Craigslist Classifieds

A window will pop-up to select the photos to add. Locate your newly created **CL Photos** folder.



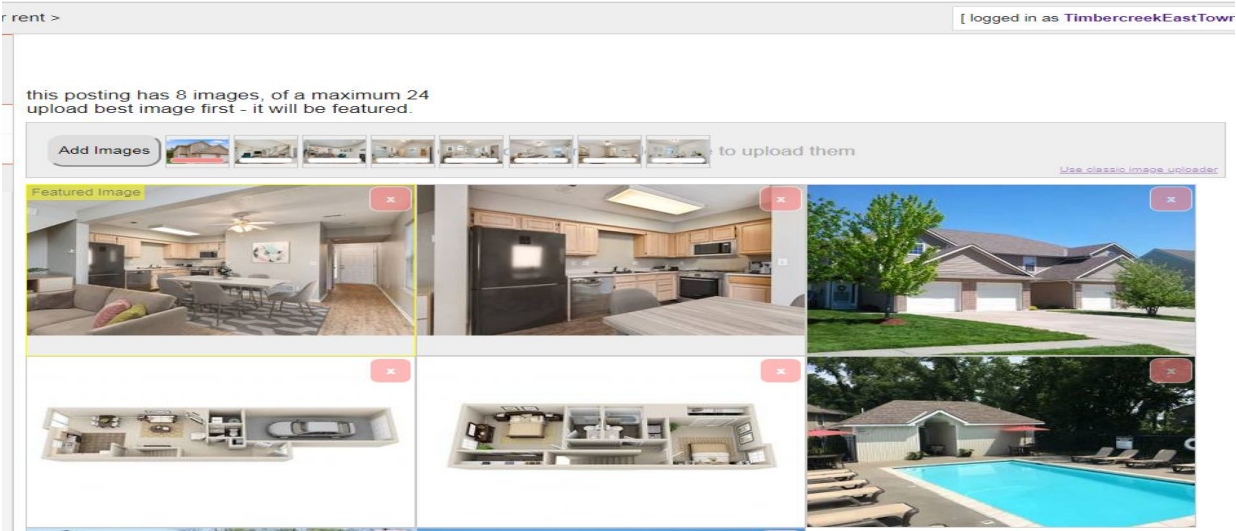
Double-click the **CL Photos** folder to open it and show all the photos that we downloaded. Click on one of the photos and then click **Ctrl + A** to select all of the photos. Then click **Open**.



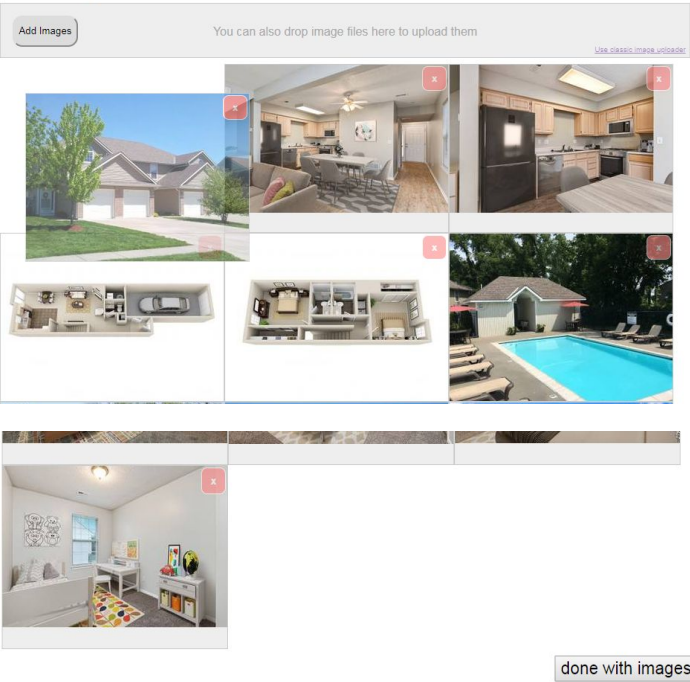
Rent Café Site Manager

Posting on Craigslist Classifieds

All of the photos will start uploading to the Craigslist Post.



To change the Featured Image or the order of the photos, click on the one you want to move and drag it to the spot you want it.



Once you have positioned the photos in the order you want them, click **Done with Images.**

Rent Café Site Manager

Posting on Craigslist Classifieds



This will bring you to the Draft page. Scroll through and review the Post. Click **Publish** to post your listing.

Attention: Your posting will expire from the site in 45 days.

this is an unpublished draft. publish

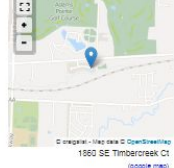
[edit post](#) | [edit location](#) | [edit images](#)

📍 kansas city > housing > apts/housing for rent

[reply](#) 📧 📧

\$995 / 2br - 1245ft² - FINALLY! This is What You Have Been Searching For! (Blue Springs)

image 1 of 16



📄 2BR / 2.8BA | 1245ft² | available may 2

☐ cats are OK - purr | ☐ dogs are OK - woof

☐ townhouse | ☐ w/o hookups | ☐ attached garage

Love Where You Live!

Find the perfect floor plan that fits your lifestyle!

Experience a relaxing escape from the outside world while still being in the middle of it all. Timbercreek East Townhomes is an intimate community of spacious 2 and 3 bedroom townhomes nestled within a quiet wooded locale. Enjoy a peaceful stroll down our community walking trail that meanders through a lush forest of trees or beat the heat by taking a dip in our sparkling swimming pool. Located off I-70 and 40 Highway, you're only a hop, skip, and jump away from shopping, dining, and entertainment. With top-rated, award-winning Blue Springs schools and exceptional customer service, you're going to fall in love with our beautiful community.

WHY YOU'LL LOVE CALLING TIMBERCREEK EAST "HOME"

Community Amenities
24-Hour Emergency Maintenance • A/C and Credit Card Payment Options Available • Beautifully Maintained Landscaping • Community Events • Easy 24/7 Online Resident Portal • Flexible Lease Terms • Fun-Filled Playground • Professional Concierge team • Recreational Picnic and Grilling area • Sparkling Swimming Pool • Stunning Nature Trail • We Love Pets

Apartment Amenities
Attached Garage with Openers • 2.5 Baths with Walk-In Showers • Breathtaking Views • Built-In Microwaves • Cable Ready • Central Heat and Air • Copy/Faxplaces • Double Sinks with Garbage Disposals • Energy Efficient Appliances • Ice Maker • Massive, Over-sized Closets • Modern Upgraded Features • Petco • Petcare Entry • Vaulted Ceilings with Energy-Saving Ceiling Fans • Washer and Dryer Connections

Pets - Max 2 allowed. Commensal: apartment will be allowed with an additional deposit and fee. For a list of breed restrictions, please contact the leasing office.
Pets will be allowed with an additional deposit and fee. Please contact the leasing office for details.

Application Fee Details
The application fee is \$10 per leaseholder or guarantor. Minors do not pay application fees.
When you apply online, you will pay at the very end of your application. The first primary applicant pays the application fee for the other.

You will be directed to another page in Craigslist that states Further Action is Required.

IMPORTANT - FURTHER ACTION IS REQUIRED TO COMPLETE YOUR REQUEST !!!

You should receive an email shortly, with a link to:

- publish your ad
- edit (or confirm an edit to) your ad
- verify your email address
- delete your ad

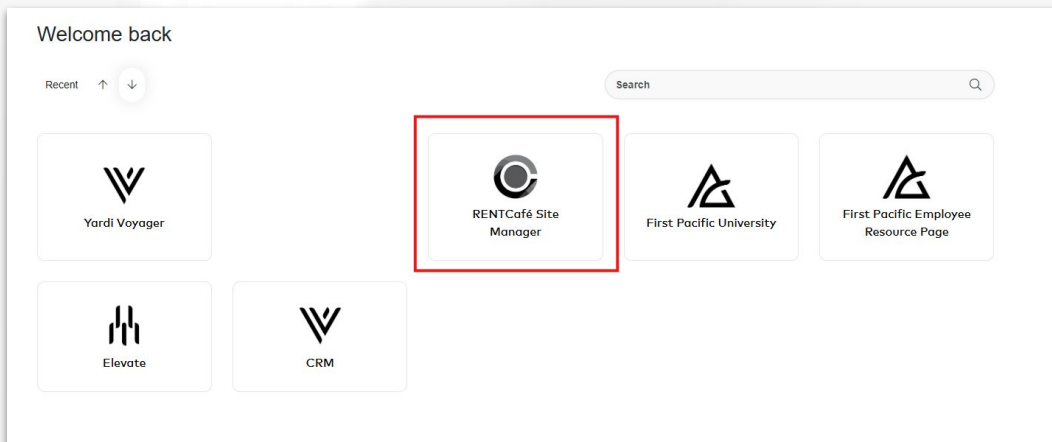
Email sent to: timbercreekeasttownhomes.craigslist.fpg@aptleasing.info

If you don't receive this email, please consult our [help pages](#)

Your email provider might misfile this mail as spam. Check your spam folders.

Rent Café Site Manager

All of our websites and online applications are hosted by Rent Café Site Manager. Your login to YardiOne will allow you access to open Site Manager.



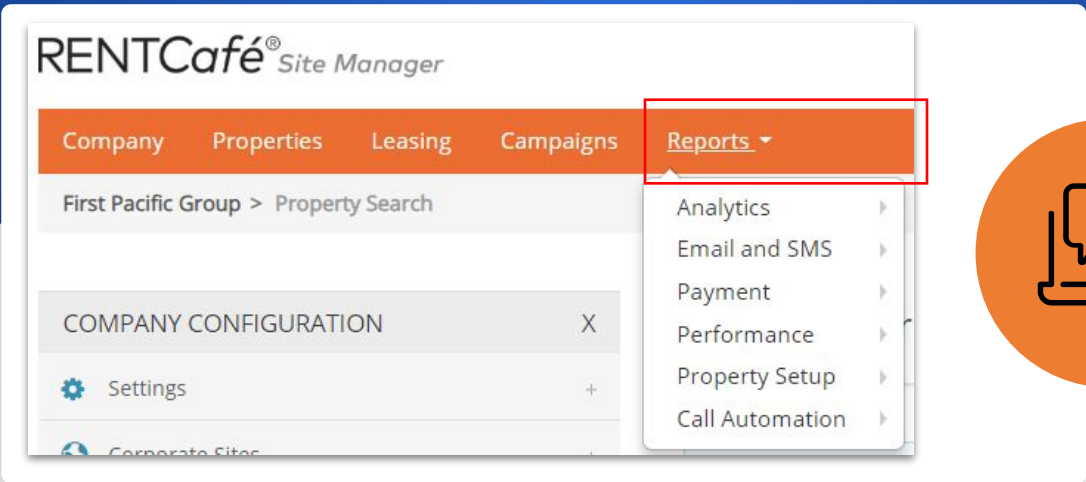
List of Items Done in Site Manager :

- Posting on Craigslist Tool - Classifieds
- Property Wide Email campaigns – Only Marketing team completes this task
- Reports
- Email Analytics Reports
- Payment Activity Reports

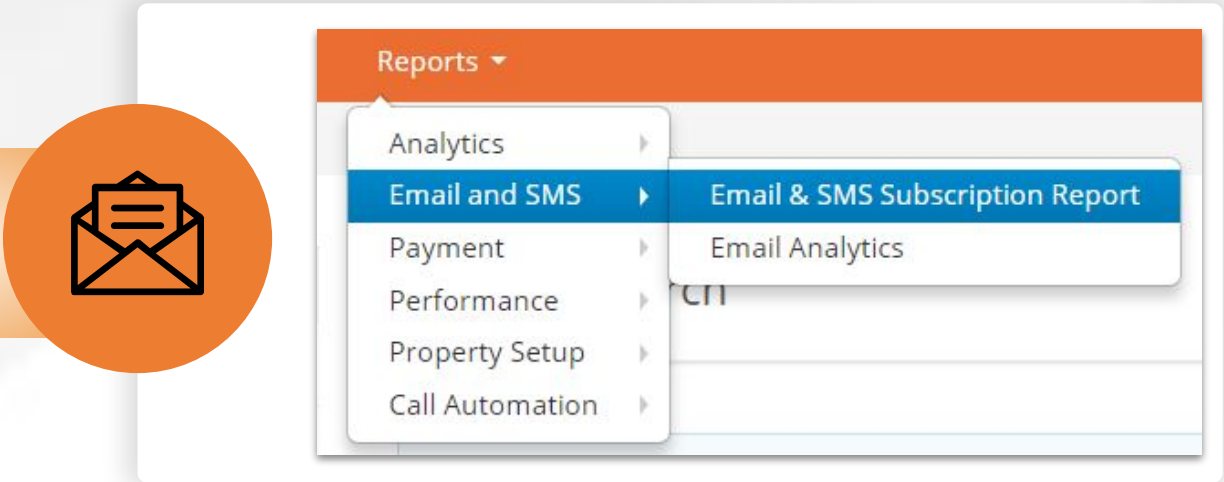
Rent Café Site Manager

Reports

Site manager has several reports available that will assist to provide additional information that is not readily available in CRM. To access Reports in Site Manager, click the **Reports** button.



You will see a list of reports that are available to click. One of the most useful reports you will use is the **Email and SMS** subscription report. Use this report to review which prospects or residents opted in to receiving emails, SMS Messages from the property as well as opted in to text-to-pay for online payments.



Rent Café Site Manager

Email / SMS Subscription Reports

Subscription Status

Property

Autumn Ridge Apartment Hoi

User Type

Resident

User Status

Unregistered

Email Opt-In

All

SMS Opt-In

All

Text-to-Pay Opt-In

All

Display

Screen

Submit

Click the drop down next to each Filter to determine the search criteria. Click Submit to view the information.

Within the results listed, you can search for a particular resident by typing their name in the Search bar.

25 records per page

Search:

Property	Users	User Type	Name	Phone	User Status	SMS Opt In	Text To Pay Opt In	Email Opt In
Autumn Ridge Apartment Homes (p0669523)	aaron@gallini.info	Resident	Aaron Gallini	6167456999	Registered	Yes	No	Yes
Autumn Ridge Apartment Homes (p0669523)	abdisalat009@gmail.com	Resident	Abdi Salat		Registered	No	No	Yes
Autumn Ridge Apartment Homes (p0669523)	monstergirl214@yahoo.com	Resident	Abigail Breedlove		Registered	No	No	Yes
Autumn Ridge Apartment Homes (p0669523)	agneskanwal1@gmail.com	Resident	Agnes Kanwal		Registered	No	No	Yes

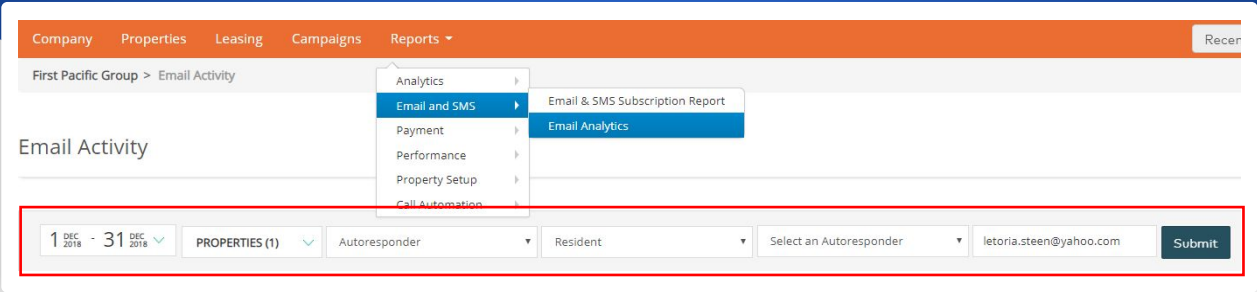
You are also able to export the Email & SMS subscription report into an Excel spreadsheet by selecting the Display drop down under the Filter and selecting Export to Excel and clicking Submit.

Rent Café Site Manager

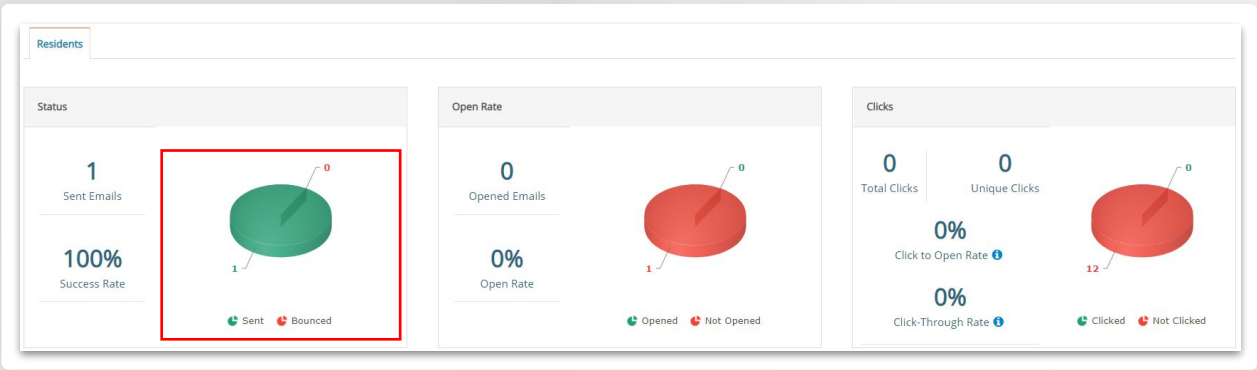
Email Analytics Reports

The **Email Analytics** report is another useful report to view what autoresponders have been emailed to residents or prospects. Click on **Reports** then **Email and SMS** and then **Email Analytics**.

Update the **Filter** by selecting a **Date** range, **Property**, **Autoresponder**, **Resident** or **Prospect** and then entering the **Email Address**. If you are wanting to pull for all residents or prospects, leave the **Email Address** blank. Click **Submit**.



This will bring up the analytics for all autoresponder emails sent to this email address. By clicking on the Pie under Sent Emails, it will bring up the emails that were sent.



Property	Email Subject	Recipient's Name	Email Address	Sent Date (m/d/yyyy)	Status	Email Opened	Link Clicked
Timbercreek East Townhomes	Payment Confirmation	Latoria Steen	letoria.steen@yahoo.com	12/1/2018 02:55 PM CST	Sent	✗	✗

Showing 1 to 1 of 1 entries

To view the email sent, click on the **Email Subject** hyperlink.

Rent Café Site Manager

Payment Activity Reports

The **Payment Activity** report can be used to search payments and the status of those payments. Click **Reports**, then **Payment**, and then **Payment Activity**. Use the **Filter** options to select the **Start Date**, **End Date**, **Property**, **Payment Method**, and **Payment Type**. Click **Submit**.

Reports ▾

Analytics ▸

Email and SMS ▸

Payment ▸

Performance ▸

Property Setup ▸

Call Automation ▸

Payment Activity

Check Voyager Setup

ePay Adoption

Hide Filter

Start Date (m/d/yyyy)

12/11/2018

End Date (m/d/yyyy)

12/11/2018

Property

Timbercreek East Townhome ▾

Payment Method

☒ All

☒ Bank Account

☒ Credit Card

☒ Debit Card

☒ Apple Pay

☒ Masterpass

☒ Cancellations

Payment Type

☒ All

☒ One-Time

☒ Auto-Pay

☒ Application Fees & Earnest Money

Submit

This will list the results of the payments made and the status of the payments. You can also download the report by clicking on the Floppy Disk icon dropdown and selecting the format to download.

1 of 2 ? Find Next												
Total Records: 72												
Property Name	User Name	User Email	Type	Amount	Status	Description	Date (EST) (m/d/yyyy)	Source	Apartment #	Voyager Property Code	IP Address	
Timbercreek East Townhomes	Shelby Spiwak (p0244673)	shelspiwak@gmail.com	App Fee	600.00	Success	Application Fee (Receipt#: 601748631)	12/10/2018 6:19:40 PM	Desktop	1834	te	73.48.8.243	
Timbercreek East Townhomes	Leslie Jones (p0244154)	holsather15@gmail.com	App Fee	550.00	Success	Application Fee (Receipt#: 601748510)	12/8/2018 12:14:19 PM	Desktop	1720	te	73.48.8.243	
Timbercreek East Townhomes	Mandi Eldred (t0050814)	mandi_jo_eldred@yahoo.com	One Time	121.95	Success	Receipt#: 601748241	12/7/2018 11:16:49 AM	Desktop	1760	te	168.166.236.106	



Paperless Items

01

Receivable/check copies-
Keep filed for 3 months
then shred

02

VISA receipt copies- Keep
filed for a month, then
dead shred

03

New resident
correspondence (ex:
letter we receive from
resident) – attach in
residents file in CRM IQ

04

Outgoing resident letters (ex: noise
violation) Print a copy to deliver and
save a copy in their resident file in
CRM. Site Code Apt# First initial of
First name Resident's last name
Document name and date.

05

Ex: "CB J. Harris 1002 Noise
Complaint 12-30-24"

06

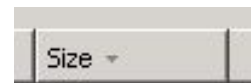
Resident Correspondence Log - all
resident correspondence should
now be entered into CRM IQ
memos- refer to CRM IQ memos
section of this manual.

Paperless

Reducing PDF Size

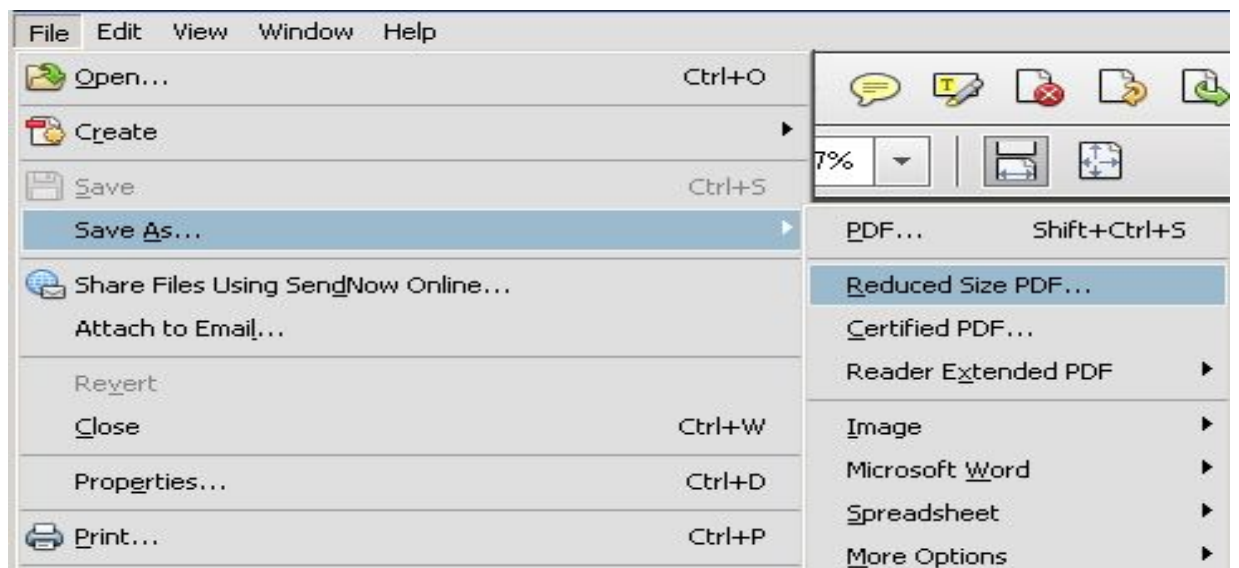
If you find that your PDF files are too large to upload to Yardi or elsewhere, here is an easy way to reduce the size down.

TIP- If your file is over **2MB**, it is best to try and reduce it's size

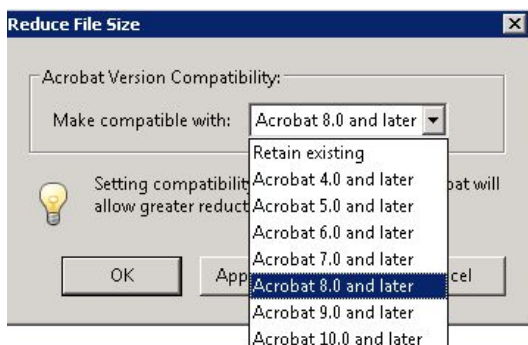


5,572 KB

With in Adobe Acrobat (not in Adobe Reader), go to File-> Reduce Size PDF

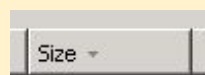


Change the drop down under 'Acrobat Version Compatibility' down to 'Acrobat 8.0 and later'.



Once you save it, the file size should reduce considerably :

WAS



5,572 KB

NOW



195 KB

Resident Referral Credit

01

Referrals are to be paid after the new resident who moved in has been living in their home for 30 days.

02

The applicant MUST tell the leasing specialist on the initial call who referred them in order for the resident to get credit.

03

The referral credit is to be applied as a one-time concession to the referring resident's account after these 30 days.

04

This slip as well as CRM memo notes should be added to both accounts (please scan and save to resident file as an attachment.)

Resident Referral Credit

New Resident Name :

Apartment :

Move-in Date :

Lease Term :

Referring Resident :

Referring Unit :

Credit Entered by :

Amount :

*Referrals are to be paid after the new resident who moved in has been living in their home for 30 days. The referral credit is to be applied as a onetime concession to the referring resident's account after these 30 days. This slip as well as yard memo notes should be added to both accounts.

Resident Retention Program

- Our number one goal is to keep our residents and it is up to us to make that happen!
- Make sure to understand and follow this plan
- Make it a priority to learn resident names and pet names
- Always greet residents
- Remember, we are, "At Your Service."

Prior to move in
Confirm utilities are in the resident's name, review all lease documents/key points/payment info
Move in day
Team member walks apartment prior to move-in with Sparkle Bucket and leaves the gift with move-in booklet; Take move-in photos for their file. Confirm payment in-full made with certified funds Escort resident to their new home and indicate on map all community amenities Hold mail keys until move-in checklist returned Move-in follow up email (Auto Sent)
1 day after mi
VP Letter Emailed
7 days after mi
Follow up call on happiness with new home
14 days after mi
Maintenance Supervisor knocks on door to go over procedures Follow-up Maintenance door hanger Move-In Survey emailed (Auto Sent)
60 days after mi
Follow-up to deliver, "Have a Great Day," door hanger
90 days after mi
Follow-up call/ SMS to check-in
During lease term
Ongoing communication, quarterly newsletter and resident events
120 days prior to renewal
Blank Service Request sent to resident 120 Day Email Auto-Sent
90 days prior to renewal
- Issue 90-day Renewal Proposal offer letter to be included on invitation with a small treat - Email and post the offer to their door - Send calendar invite for 30 days after notice served as offers will expire After 30 days anyone that has not renewed is given an additional 7 days to sign or renewal or their proposal will be deleted and a new proposal at a great rate will be issued
80 days prior to renewal
Contact anyone that has not signed a renewal or given notice
70 – 60 days prior to renewal
If moving, NTV is now required Contact anyone that has not renewed or given notice to remind them of 60- day notice 30 day notice required for SC & SS If renewal or NTV is not signed, then email the list of whose proposals need to be deleted and regenerated
50 – 45 days prior to renewal
Send new offer letter
35 – 30 days prior to renewal
Send MTM reminder
20 – 14 – 10 days prior to renewal
Contact Resident to remind them they will be going MTM
After renewal
Thank You Email/ Survey Auto Sent Carpet Voucher inside card signed by the team
After review
Send Thank You Card with Gift Card (Must be approved by Regional)

Resident Retention Program

PRIOR TO MOVE IN

- Confirm utilities are in the resident's name, review all lease documents/key points/payment info

MOVE IN DAY

- Team member walks apartment prior to move in with sparkle bucket
 - Leave move-in gift & move-in booklet
 - Take move-in photos and upload to resident's attachments in CRM
- Confirm payment in-full made with certified funds
- Escort resident to their new home and indicate on map all community amenities
- Hold mail keys until move-in checklist returned
- Move-in follow up email (Auto Sent)



1 DAY AFTER MI

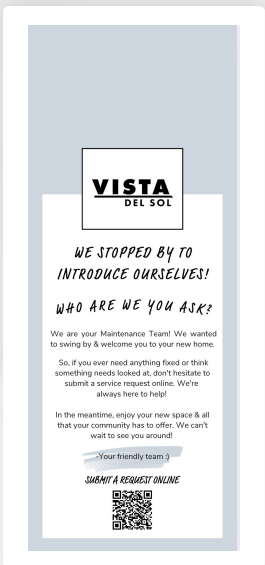
- VP Letter Emailed

7 DAYS AFTER MI

- Follow-up call on happiness with new home

14 DAYS AFTER MI

- Maintenance Supervisor knocks on door to go over procedures
- Follow-up Maintenance door hanger
- Move-In Survey emailed (Auto Sent)



Resident Retention Program

60 DAYS AFTER MI

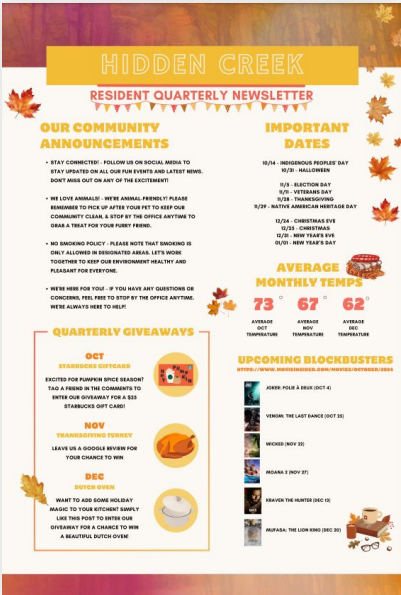
- Follow-up to deliver, "Smile Door Hanger," door hanger

90 DAYS AFTER MI

- Follow-up call / SMS to check-in

DURING LEASE TERM

- Ongoing communication, quarterly newsletter and resident events



120 DAYS PRIOR TO RENEWAL

- Blank Service Request sent to resident
- 120 Day Email Auto-Sent

Resident Retention Program

90 DAYS PRIOR TO RENEWAL

- Issue 90-day Renewal Proposal offer letter to be included on invitation with a small treat
- Email and post the offer to their door
- Send calendar invite for 30 days after notice served as offers will expire
 - After 30 days anyone that has not renewed is given an additional 7 days to sign or renewal or their proposal will be deleted and a new proposal at a great rate will be issued



12/11/2024
Joseph Sokol
Kimberly McKellar
3255 Softwater Lake Drive NE Apt. 106
Grand Rapids, MI 49525

Dear Joseph Sokol, Kimberly McKellar and all other occupants

We are pleased to invite you to continue your residency at Lake Forest Apartment Homes! It is wonderful residents like you that make us the 'one-of-a-kind' community that it is, and we want to make sure we are doing everything we can to ensure you are happy in your home! We know that your home is an important place, and we are happy you have chosen Lake Forest Apartment Homes as the place where you plant your feet each day and hope you continue to do so in the future.

We show that your current lease is due to expire on **03/10/2025** and we have made it easier than ever for you to renew your lease by offering you a competitive lease rate with flexible options. We have also made the signing process as convenient as ever by sending you your options to review and sign online. **PLEASE NOTE THIS OFFER EXPIRES 01/10/2025. Once the offer expires you will be able to renew your lease prior to the expiration of your lease 03/10/2025 to avoid the month to month fee.**

	5 Month Renewal		12 Month Renewal
Rent	\$1,535.00	Rent	\$1,535.00
Parking Fees	\$25.00	Parking Fees	\$25.00
Short Term Lease Premium	\$100.00	Utilities	\$105.00
Utilities	\$105.00		\$
	\$		\$

If you do not wish to renew your lease and you plan to move, you must sign a 60-day written notice to vacate form via your resident portal. This form must be signed by all lease holders as well as by a member of the office team to be valid. If we do not receive your written notice to vacate on or before, or if you fail to renew by the expiration date, you will automatically be put on a month-to-month basis at a rental rate of **\$1540.00** with a month-to-month fee of **\$300.00** for a total of **\$1,840.00** plus utilities and other monthly fees at the market rent.

Prior to deciding to vacate, please share any concerns you may have with the office, and we may be able to accommodate your needs.

Again, we thank you for your continued residency and hope you continue to call Lake Forest Apartment Homes home. Please don't hesitate to contact us with any questions. We hope to receive your RSVP today!

Warmest Regards,
Lake Forest Apartment Homes Management
Always at Your Service!



Resident Retention Program

80 DAYS PRIOR TO RENEWAL

Contact anyone that has not signed a renewal or given notice

70 DAYS PRIOR TO RENEWAL

Send 15 Day offer Expiring Letter

60 DAYS PRIOR TO RENEWAL

- if moving, NTV is now required
 - Contact anyone that has not renewed or given notice to remind them of 60- day notice
 - 30 day notice required for SC
- If renewal or NTV is not signed, then email the list of whose proposals need to be deleted and regenerated
- Post It's time to renew card to door

50 DAYS PRIOR TO RENEWAL

Send new offer letter

45 DAYS PRIOR TO RENEWAL

45-Day reminder email will auto-send to the resident encouraging them to renew if they haven't already done so. Attach cost of moving door hanger to door.

35 DAYS PRIOR TO RENEWAL

Follow up call to resident to remind them of the Month-to-Month fees and notice requirements & encourage them to renew or determine any concerns they have

30 DAYS PRIOR TO RENEWAL

SC 30 day notice due
Send MTM Reminder

20 DAYS PRIOR TO RENEWAL

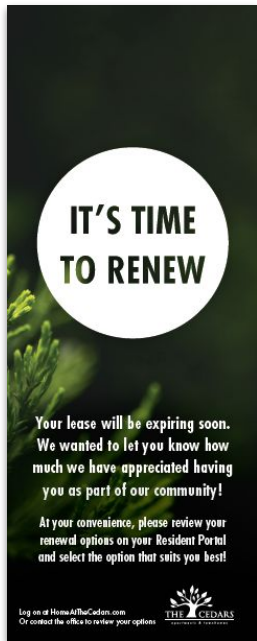
Follow up call to remind them to renew to avoid month-to-month fees.

15 DAYS PRIOR TO RENEWAL

Contact Resident to remind them they will be going MTM

10 DAYS PRIOR TO RENEWAL

Follow up call & visit the resident's home between 5 & 6pm if they have not signed to remind them to renew ASAP to avoid month-to-month fees.



Resident Retention Program

AFTER RENEWAL

- After Renewal Thank You Email/Survey Auto Sent

HIDDEN CREEK APARTMENTS

HELP BUILD AN EVEN BETTER COMMUNITY! HOW ARE WE DOING?

Thank you for continuing to call a First Pacific Group community home. We are at your service and are here to assist in any way we can. Please take a quick minute to evaluate our services. We are anxious to help continue making your home a happy one.

Resident's Name: _____ Unit #: _____ Phone#: _____

Do you receive prompt, courteous and professional service from our:

Leasing Staff:	1★	2★	3★	4★	5★
Management Staff:	1★	2★	3★	4★	5★
Maintenance Team:	1★	2★	3★	4★	5★

Comments/Suggestions: _____

Were your service requests handled quickly and efficiently? 1★ 2★ 3★ 4★ 5★

Comments / Suggestions or work order required: _____

Are the grounds and common areas kept to your satisfaction? 1★ 2★ 3★ 4★ 5★

How would you rate your community amenities? (Please only rate for amenities applicable to your community)

Pool:	1★	2★	3★	4★	5★
Laundry Room:	1★	2★	3★	4★	5★
BBO/Picnic Area:	1★	2★	3★	4★	5★
Playground:	1★	2★	3★	4★	5★
Bike Rack:	1★	2★	3★	4★	5★
Resident Activities:	1★	2★	3★	4★	5★

What resident services and activities would you like to see next month? _____

Would you recommend your community to a friend? 1★ 2★ 3★ 4★ 5★ - Why? _____

We appreciate any ideas you may have to help us improve your community. _____

We would greatly appreciate it if you could take a moment and visit our www.ApartmentRatings.com page and write a quick review.

Don't have time to rate us? Let us do it for you!
Would you allow us to post your review of the community for you and use it as a testimonial? "If no name is given we will enter it anonymously" Yes ☐ No ☐

Please return to the Management office or drop box.
www.SantaCruz-Apts.com

- Upon renewal each home is given a carpet cleaning coupon or the option of an upgrade – The carpet voucher is good for one free carpet cleaning within 60 days of receipt. They can reach out to the manager for other upgrade options such as: Blind replacement, Light fixture replacement, etc.
- If the resident chooses the carpet cleaning they will reach out to the vendor directly to schedule the cleaning themselves
- At the time the cleaning is done the resident should present the voucher to the vendor for payment or leave in plain site in the apartment for the vendor if they aren't home
- The vendor should then take the voucher and staple it to the invoice as they submit it for payment
- Once the invoice is received, the voucher is scanned and attached to the resident profile
- Check 'No' on the chargeback stamp and note "Renewal" on the notes line
- Be sure to update the residents email address, phone number, and emergency contact upon renewal.

**GET YOUR CARPETS
CLEANED - ON US!**

THANK YOU FOR RENEWING!

**FIRST
PACIFIC
GROUP, INC.**

_____	NAME
_____	APARTMENT
_____	RECEIVED
_____	EXPIRATION
_____	AUTHORIZED BY
_____	SERVED BY

OFFER VALID FOR 60 DAYS AFTER RECEIPT. VOUCHER MUST BE COMPLETED BY A FIRST PACIFIC REPRESENTATIVE AT THE TIME OF RENEWAL

Resident Retention Program

AFTER APARTMENT RATING REVIEW

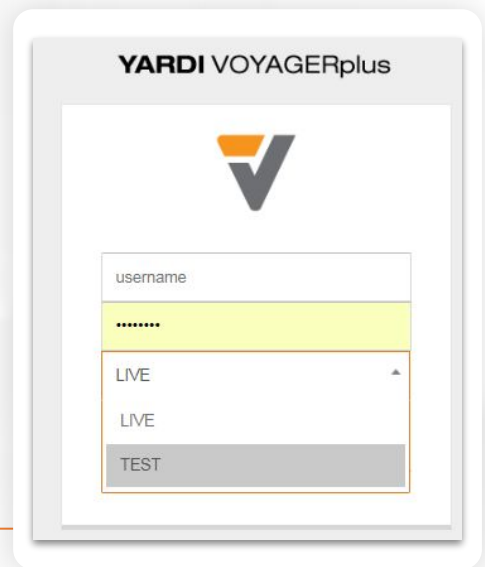
Send a personal thank you card with a gift card once approved by the regional manager.



Yardi CRM



Yardi is the Property Management Software that our company uses for a majority of the tasks relating to prospects and residents. Yardi Voyager will be utilized by Managers and Assistants as well as CRM IQ which will be utilized for all leasing teams.



TEST MODE

If at any time you want to practice, you are able to log into Yardi's Test Mode. You can then familiarize yourself anytime with any aspect without worrying about it affecting anything. Always ask if you are unsure of how something works in Yardi! ***NOTE*** Color scheme for Test CRM IQ is not different. Make 100% sure you are in test mode. Color scheme for Voyager will be grey color scale.

CRM IQ Community Dashboard



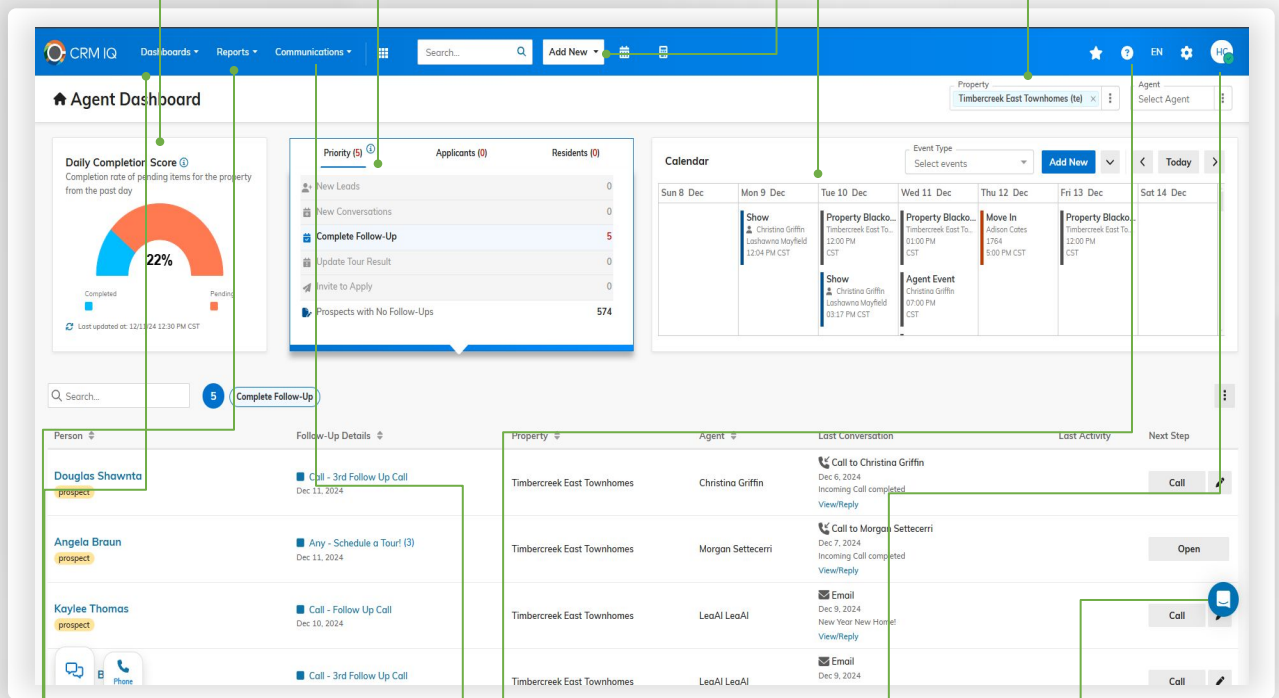
Daily Completion Score: Designed to track your progress throughout the day. You can update this about every 5 minutes.

Queue Box: Shows your Priorities, Applicants, Residents. With next steps for each prospect / resident.

Property / Agent Filters: You can change your property / agent here at any time.

Calendar: The Calendar is extremely important and should be looked at daily. This shows all Appointments for the week and the Full calendar show all items including memos if selected.

Add New: Quickly add a guest card, Follow up, or Work order



Reports: Access Residential and CRM IQ Reports

Dashboards: Clicking Dashboards give you access to a range of information. Documents, Renewals, Work orders, availability, etc.

Help Center: You can view here for any updates, videos, or research questions.

Communications: Primarily used for Marketing you can review analytics, create campaigns, and send eblasts. *Permission Required to use*

Live Agent Support: Chat with a Yardi Representative for any questions / issues in IQ.

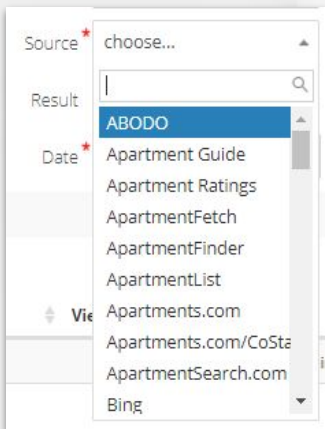
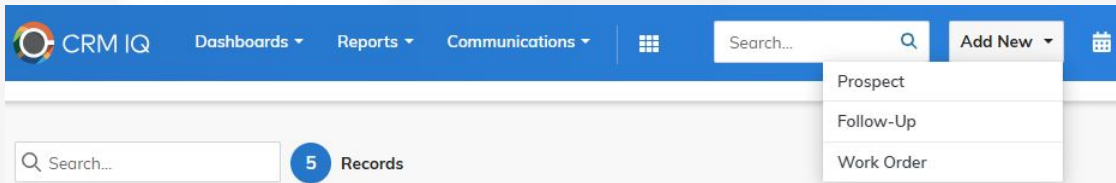
Profile: Click here to update your email signature, e-sign signature, switch to dark/light mode, update your profile, mark yourself as available/busy/away, change systems, or simply just log out.



Guest Card

Entering Prospect/Guest

Click on Add New → Select Prospect → Enter Information → If there are possible matches it will show below → If none match click Save.



Source Is Important!

It is highly important to get the correct source from prospects. DO NOT randomly choose one if you don't get the source immediately as this will throw numbers off. We spend lots of money on marketing and putting in the correct source helps us analyze where we should be doing more marketing and if certain campaigns are doing well.

When entering a new guest, all the fields with red asterisks are mandatory fields that you must fill in in order for it to save. It is important for you to enter all the relevant information into each field section to serve as a reminder to what the prospect is looking for, if they have pets, when they are looking to move in, what their budget is, etc.

Add Prospect

Prospect Details

*Indicates required field. Phone or email is required.

First Name*

Halley

Last Name *

Cornish

Phone

(580) 580-5880

Email

test@fpacific.com

Property *

Cedar Brooke Apartments (cb)

Agent *

Jennifer Reeves (cb)

First Contact *

Call

Source *

Apartments.com

Possible Matches

If a prospect record already exists for this prospect at this property, please open it below instead of creating a new one.

Name	Phone Number(s)	Email	Person Type	Unit Type	Unit	Status
Halley Cornish	(000) 000 - 0000	testtesttest@gmail.com	Prospect		None	Prospect
Halley Cornish	(000) 000 - 0000	trainingtest@gmail.com	Prospect		None	Prospect
Halley Cornish	(567) 843 - 9209	test123test456test@gmail.com	Prospect	cb1b1 (1x1-U)	2102	Prospect

Cancel

Save

CRM IQ

Guest Card



As you start to fill out the prospect's name and phone number, the system will start looking for a match for a previous prospect. These matches will start appearing below the guest card. If any of the prospects populating are a match, you can select the match and hit Merge Guests. *NOTE* Once merged, you cannot unmerge so be sure it is a match.

NOTE : Please check the agent selected is the correct name. This can be changed with managers approval.

Add Prospect

Prospect Details

*Indicates required field. Phone or email is required.

First Name* Last Name* Phone Email

Property* Agent* First Contact* Source*

Possible Matches

If a prospect record already exists for this prospect at this property, please open it below instead of creating a new one.

Name	Phone Number(s)	Email	Person Type	Unit Type	Unit	Status
Haley Cornish	(580) 291 - 2765	hlyncrnsh@gmail.com	Prospect		None	Prospect
Haley Cornish	(000) 000 - 0000	testtesttest@gmail.com	Prospect		None	Prospect
Haley Cornish	(000) 000 - 0000	trainingtest@gmail.com	Prospect		None	Prospect
Haley Cornish	(000) 000 - 0000	testtesttest@gmail.com	Prospect		None	Canceled
Haley Cornish	(580) 091 - 2345	testhaleycornish@gmail.com	Prospect	te-3 (3 bedroom townhome)	1701	Prospect
Haley Cornish	(567) 843 - 9209	test123test456test@gmail.com	Prospect	cb1b1 (1x1-U)	2102	Prospect
Haley Cooksey	(816) 806 - 6154	haleycooksey8@gmail.com	Prospect		None	Prospect
Haley Testc		testhaleyc@hotmail.com	Prospect		None	Prospect
Haley Aldrich		haleyaldrich513@gmail.com	Prospect		None	Prospect

Cancel Save

Once the guest card is saved, if you have the email you should always invite to RentCafe. Once on the profile click RentCafe → Invite to RentCafe. This will send the link to the applicant to start filling out the application.

Home / Search / Test Haley / Timbercreek East Townhomes

Test Haley Prospect

Follow-up Dec 12, 2024, 12:30 PM Leasing Agent Haley Cornish

Overview

Prospect Workflow

- Profile
- Roommates 0
- Select Units
- Rental Terms

Applicant Workflow

Documents

Profile

Preferred Name C0349661

Profile **RentCafe** Custom Tables Notes

Person	Email	Invite Status	Result	Account	Action	Options
Test Haley Primary	testingagain@hotmail.com	Not Invited	Not started		Invite to RentCafe	

CRM IQ Search

**01**

In this tab, as you can see you can search for a person using a variety of methods.

02

Depending on your search type, will determine what results populate. Each search type has additional search filters that can be utilized to narrow your search parameter

- **Guest Search** | Populates all Prospects defaulted by most recently entered
- **Resident Search** | Populates all Future, Current, Notice and Past Residents defaulted by most recent move in date
- **Everyone Search** | Populates both Prospects and Residents
- **Property Search** | Populates properties
- **Unit Search** | Populates all Units listed in order
- **Vehicle Search** | Populates all vehicles

CRM IQ

Dashboards ▾ Reports ▾ Communications ▾

Search...

Add New ▾

📅

📱

Search

Keywords
ex: "John Smith"

Type
Everyone ▾
Everyone
Prospect
Resident
Pet
Vehicle

Property
MO list (.molist, list) x

Unit
Select Unit

Status
All ▾

More ▾

Search

Save

Clear

To begin, please enter your search terms into the Keywords field.

CRM IQ Unit Availability Report



01

The instructions below show how to pull the Unit Availability Report through CRM IQ Reports.

02

The instructions below show how to pull the Unit Availability Report through CRM IQ Reports.

03

Only managers will have access to change the notes field.

04

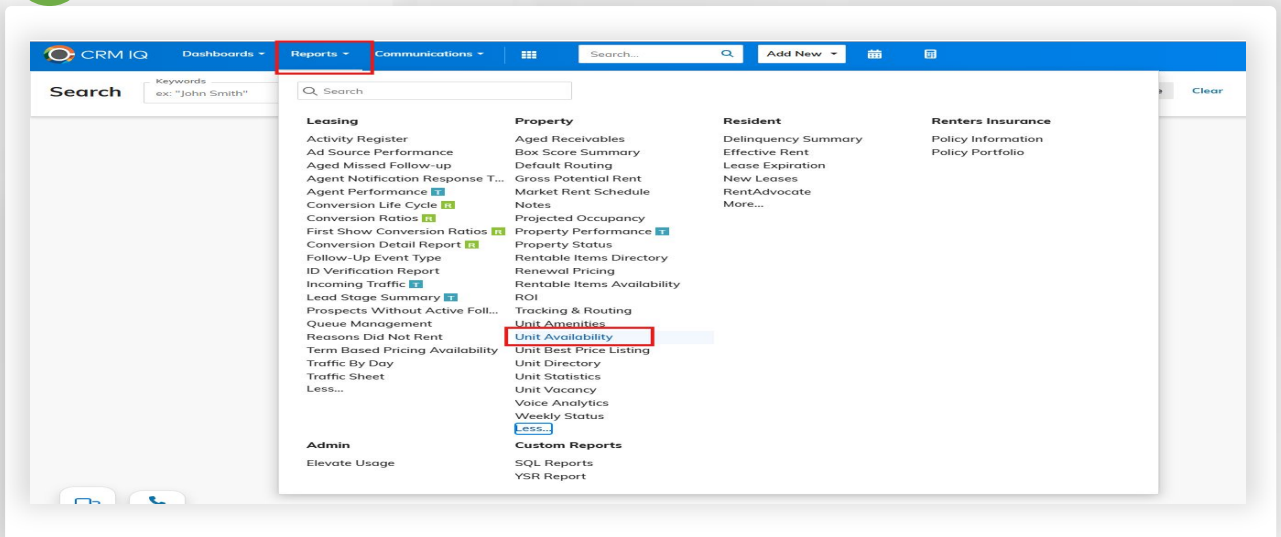
A copy has also been saved to your site server under office forms.

Unit Availability Report



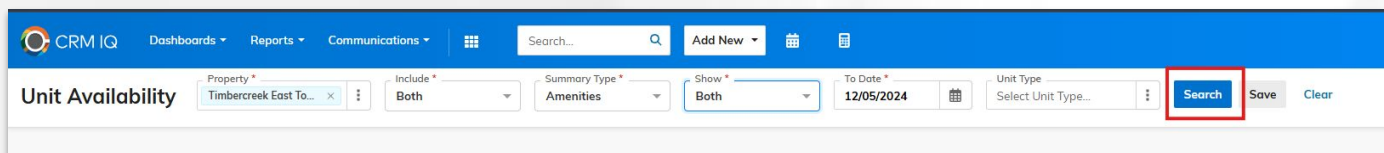
01

Pull the Unit Availability Report by going to Reports Click More... Unit Availability



02

Use the filter screen to select the property and To Date. On the Include drop down, be sure to select Pre-Leased Units and under Show drop down select Both. Click Search



03

Once the report populates, you can download it in either PDF or Excel to print if necessary.

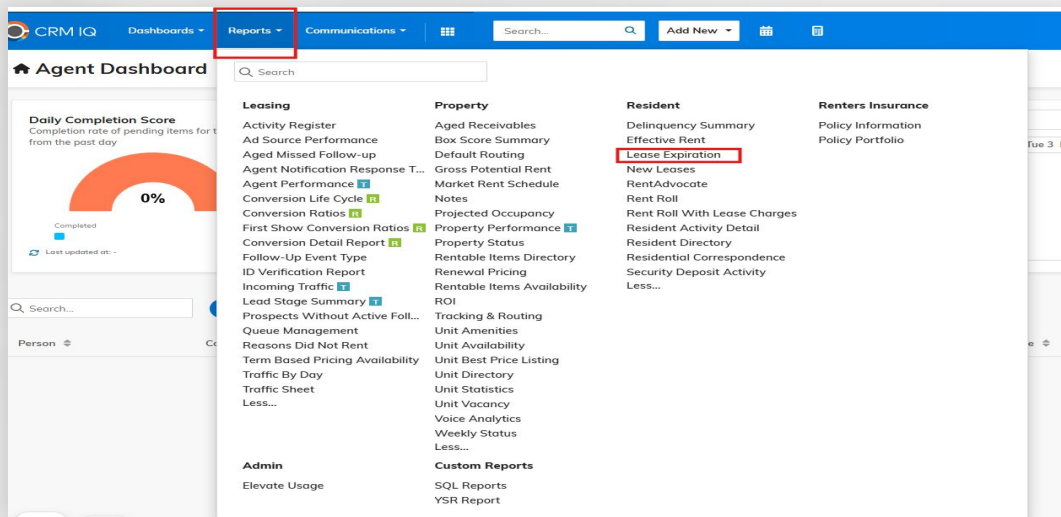
[illegible]

CRM IQ

Lease Expirations



- To see an overview of upcoming lease expirations you can take a quick look at the Availability Dashboard or the Renewal Dashboard.
- You can also pull the report shown below for more information and to give you a broad overview for upcoming months. Click Reports → Lease Expiration



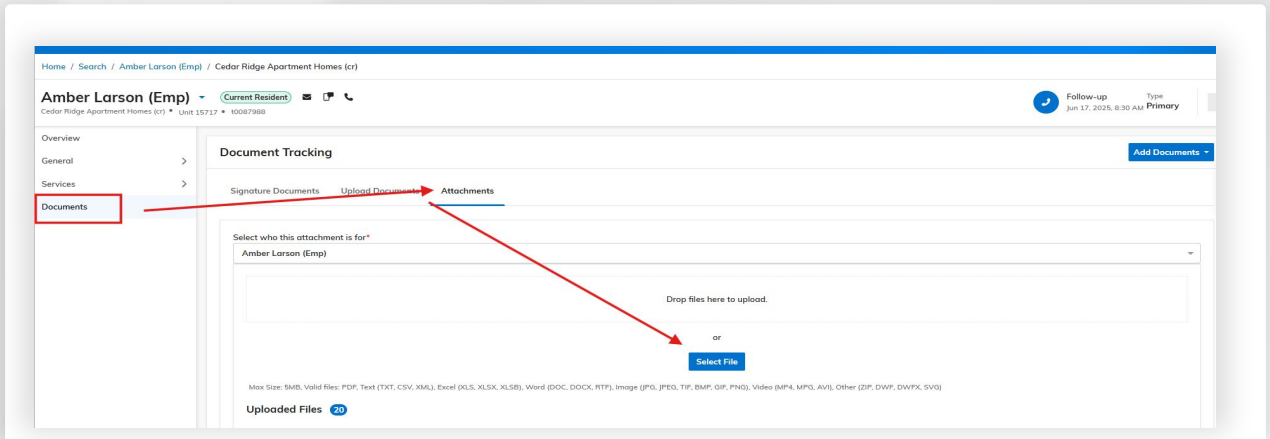
- Enter the filters for Property and month period you are looking for. Then hit Search and the screen below will show. You are able to drill down on any of the blue numbers for more information on the residents expiring that month.

Lease Expiration																
Property *		Summary Type *		Month/Year *		Unit Type										
Timbercreek East To...		Property		12/2024		Select Unit Type...		Search	Save	Clear						
Property	Address	Units	MTM	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Total
te	Timbercreek East Townhomes (te)	100	2	1	2	4	14	8	6	8	12	13	14	11	4	97
Total		100	2	1	2	4	14	8	6	8	12	13	14	11	4	97

Adding Attachments IN CRM IQ

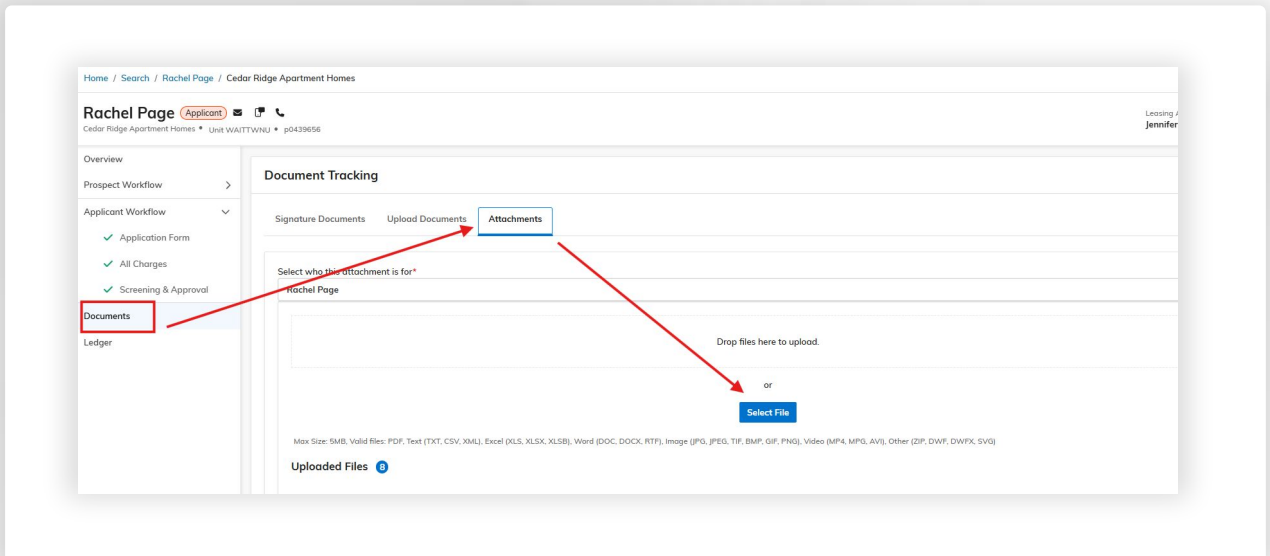


Go to resident's Lease Info page, then click on the Attachments tab



The screenshot shows the CRM IQ interface for a resident named Amber Larson (Emp). The left sidebar has a 'Documents' tab highlighted with a red box. The main content area is titled 'Document Tracking' and has three tabs: 'Signature Documents', 'Upload Documents', and 'Attachments'. The 'Attachments' tab is selected and highlighted with a red box. Below the tabs, there is a dropdown menu labeled 'Select who this attachment is for*' with 'Amber Larson (Emp)' selected. Below this is a large text area with the instruction 'Drop files here to upload.' and a 'Select File' button. At the bottom, there is a list of supported file formats and a counter for 'Uploaded Files' showing 20.

To add attachments to guest cards, go to the Applicant's Profile screen and click the **Attachments** hyperlink



The screenshot shows the CRM IQ interface for an applicant named Rachel Page. The left sidebar has a 'Documents' tab highlighted with a red box. The main content area is titled 'Document Tracking' and has three tabs: 'Signature Documents', 'Upload Documents', and 'Attachments'. The 'Attachments' tab is selected and highlighted with a red box. Below the tabs, there is a dropdown menu labeled 'Select who this attachment is for*' with 'Rachel Page' selected. Below this is a large text area with the instruction 'Drop files here to upload.' and a 'Select File' button. At the bottom, there is a list of supported file formats and a counter for 'Uploaded Files' showing 0.

Once on the Attachments screen, click on the **Choose Files** button.

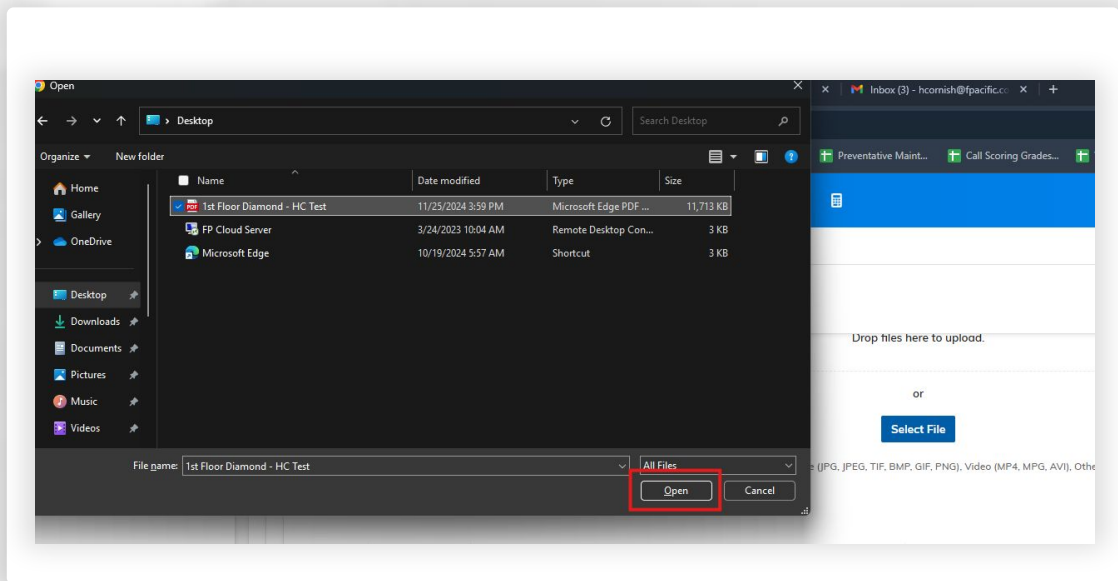


The image shows four buttons in a row: 'Choose Files', 'Start Upload', 'Cancel Upload', and 'Delete Selected'. The 'Choose Files' button is highlighted with a red box.

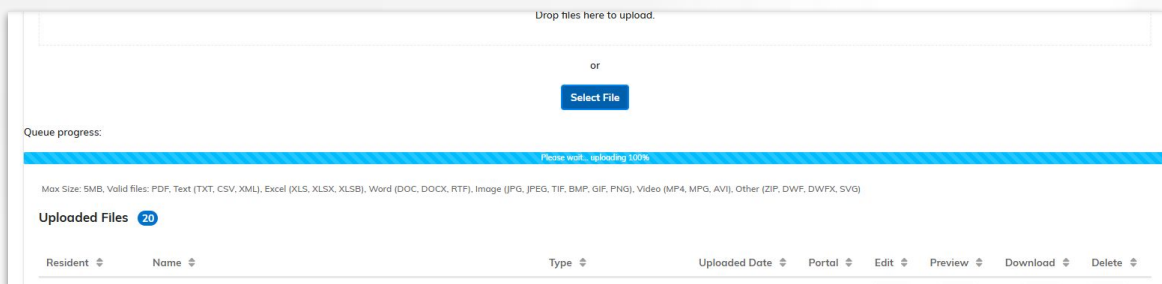


Adding Attachments IN CRM IQ

The following window will appear. Select the file to be uploaded and hit the Open button. NOTE: If added to desktop it should be deleted immediately after. Nothing is to be saved to your desktop.



Once you select the document and click open it will automatically start uploading the document. If you need to edit the name you'll click the Pencil.



Max Size: 5MB, Valid files: PDF, Text (TXT, CSV, XML), Excel (XLS, XLSX, XLSB), Word (DOC, DOCX, RTF), Image (JPG, JPEG, TIF, BMP, GIF, PNG), Video (MP4, MPG, AVI), Other (ZIP, DWF, DWFX, SVG)

Uploaded Files 21										
Resident	Name	Type	Uploaded Date	Portal	Edit	Preview	Download	Delete		
Amber Larson (Emp)	1st Floor Diamond - HC Test.pdf		Dec 5, 2024							



Work Orders



01

Residents can enter work orders via phone, e-mail, online or in person.

02

Our goal is to complete work orders in a 24-hour turn-around period, or the same day if we are able.

03

Emergency or high priority work orders such as a water leak, no heat, no water or a lock change, will be first priority. Otherwise, for fair housing reasons, all work orders need to be completed in the order they were submitted. For this reason, it is very important that work orders be entered and printed immediately as they are received.

04

Work orders should also be entered for any office, amenity, or site work that is needed. For example, installing new stop signs, new fence post, or repairing an office window. These will help us to keep track of the workload of the maintenance team and serve as a record for work completed in the past.



Work Order Reminders

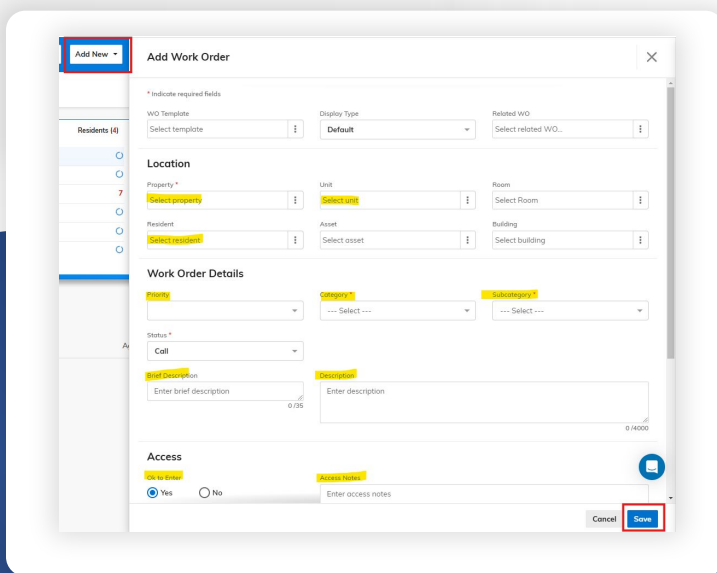


- Any time that you are entering a work order you need to make sure that you are inputting not only the description but the problem description as well.
- The description field at the very top needs to be precise. For example, stove not working; toilet running; fridge not getting cold; electric outlet not working; toilet clogged; etc. If you have multiple issues, please mention all here.
- The problem description goes into detail on the issue in order to help the maintenance gather information and supplies before performing the work. So, if the hot water isn't working you can say "hot water works for 10-15 minutes and then gets freezing cold" or "heat set at 75 but blowing out cold air. Resident switched to emergency heat and still not working."
- For the problem description, this is vital when pulling a service request report so that all issues can be seen at a glance. Make sure to be very descriptive. Please make sure that as much information as possible is entered.
- For electrical outlets specifically - if someone calls in and says they are not working please put them in the category of "electrical".
- If a resident test positive for COVID you are required to let the manager and the maintenance staff know immediately.
- If the resident test positive for COVID and it is an emergency our maintenance team will need to suit up and perform the work.
- If the resident test positive for COVID and it is NOT an emergency the work order will be put on hold until the resident is no longer positive.

Creating A New Work Order in CRM IQ

From the Agent Dashboard, click on **Add New** or from the Resident's Profile, click **Service Request** then **+ Add Service-Request**

- Select Unit from drop down and Resident from drop down. The resident information will auto populate. Verify all information that populated is correct including Name, phone number and email address.
- Enter a brief description of the problem and Select the category from the drop down.
- Enter full description in the Problem Description box. Be as descriptive as possible to assist maintenance complete the work.
- Health question should be asked but is NOT mandatory.
- Always ask if we have permission to enter if they are not at home. Ensure they know it may take longer if they do not give the allowance. Also verify that no minors will be in the home alone, as we will not be able to enter. Toggle the OK to enter button on.
- If resident has access notes such as dog or time to enter, add to the Access notes.
- Click Save



Add New **Add Work Order**

* Indicate required fields

WO Template: Select template | Display Type: Default | Related WO: Select related WO...

Location

Property*: Select property | Unit: Select unit | Room: Select Room

Resident: Select resident | Asset: Select asset | Building: Select building

Work Order Details

Priority: Select priority | Category: Select category | Subcategory: Select subcategory

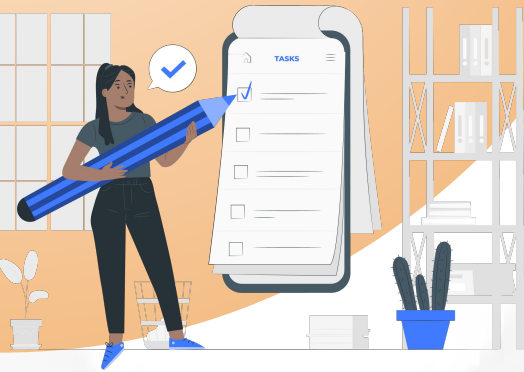
Status*: Call

Brief Description: Enter brief description (0/35) | Description: Enter description (0/1000)

Access

Are we allowed to enter? Yes No | Access notes: Enter access notes

Save



Printing Work Order/Tech Notes



Once you have saved the work order you will print 1 copy.



This copy will be put into the “to be completed” work order bin in your office.



The maintenance member completing the WO will this copy and a Maintenance door hanger to the home they are working on.



If they are able to resolve the issue, they will leave the door hanger on the residents door. Under the “Technician Notes” on the work order they will fill in how they completed it for our records.



Once filled out they will put the completed work order into the completed work order bin.



If they were not able to complete the work, they should still leave a the door hanger with notes, and notify the resident when they will be back to have the work completed.



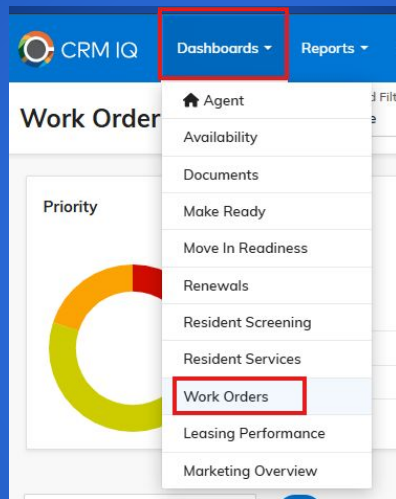
The technician should also include his/her name and the time they were in the apartment as well.



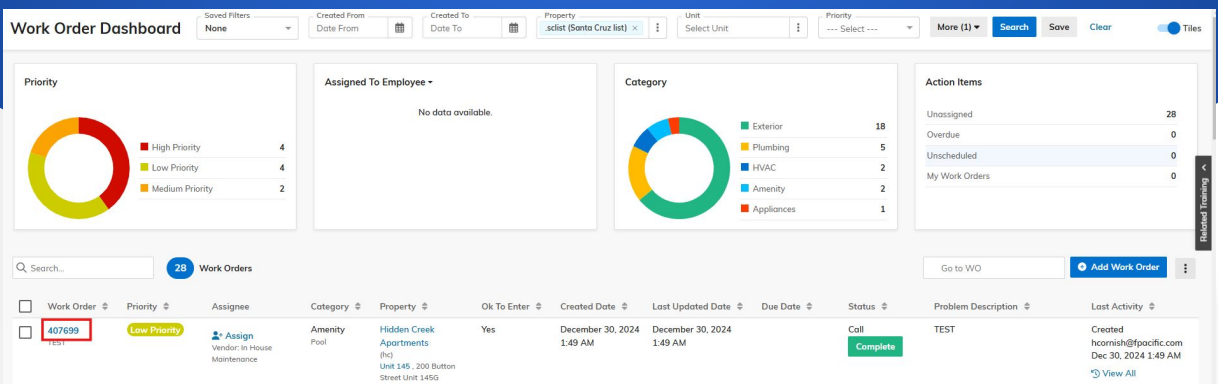
The technician should note if any charge back for damages or replacements should be charged to the resident.

Closing Out Work Orders

To close a Work Order go to the work order Dashboard in CRM IQ.



This will pull all active work orders in the system. To complete a work order simply click the work order Hyperlink.



After clicking the hyperlink a the work order details will appear. Click View More Details in the top right corner to add the techs labor times.

The screenshot shows the Work Order Details form for WO# 407699. The 'View More Details' link is highlighted with a red box. The form includes sections for Information, Attachments, Location, and Work Order Details. The 'View More Details' link is located in the top right corner of the form.

WO# 407699

Information Attachments

* Indicate required fields

WO Template: Select template | Display Type: Default | Related WO: Select related WO...

Location

Property: hc (Hidden Creek Apartments) | Unit: 145 (hc) | Room: Select Room

Resident: Select resident | Asset: Select asset | Building: Select building

Work Order Details

Priority: Low Priority | Category: Amenity | Subcategory: Pool

Status: Call

Brief Description: TEST | Description: TEST

Cancel Save

Closing Out Work Orders

Click Labor on the left side menu and then click + Add Labor.

Work Order #407699

Information
Status Dates
Approvals
Vendor Proposals
Attachments
Photos
Tech Notes
Labor
Materials
Audit History

Employee Skill Scheduled Actual Hours Pay Charge Commission Tax

+ Add Labor

Select the Employee from the drop-down menu and enter the Actual Start Date, Actual Start Time, Actual Finish Date, and Actual Finish Time. **Click Save.**

Labor

Employee* jambriz (Jaime Ambriz) Skill Select skill... Scheduled Start 12/30/2024 7:00 am Scheduled Finish 12/30/2024 7:00 am Actual Start 12/30/2024 7:00 am Actual Finish 12/30/2024 7:05 am Total Hours 0

Commission Pay Unit Pay (\$) Pay Amount (\$) Pay Account Unit Commission Tax Charge Unit Charge (\$) Charge Amount (\$) Charge Code Unit

Save

After clicking save it will show you the labor added. Click the back button **twice** to go to the main work order page.

Work Order #407699

Information
Status Dates
Approvals
Vendor Proposals
Attachments
Photos
Tech Notes
Labor
Materials
Audit History
Purchase Orders

Employee Skill Scheduled Actual Hours Pay Charge Commission Tax

Jaime Ambriz Start: 12/30/24 7:00 AM Finish: 12/30/24 7:05 AM 0.08 Amount \$0.00 Amount \$0.00

Total 0.08 Amount \$0.00 Amount \$0.00

Back

Closing Out Work Orders

- Once returned find your work order and click Complete

Q Search...

28 Work Orders

Go to WO

Add Work Order

☐	Work Order	Priority	Assignee	Category	Property	Ok To Enter	Created Date	Last Updated Date	Due Date	Status	Problem Description	Last Activity
☐	407699 TEST	Low Priority	Jaime Ambriz Assign Vendor: In House Maintenance	Amenity Pool	Hidden Creek Apartments (Hd) Unit 145, 200 Button Street Unit 145G	Yes	December 30, 2024 1:49 AM	December 30, 2024 2:05 AM		Call Complete	TEST	Assigned to Jaime Ambriz Haley Cornish Dec 30, 2024 10:05 AM View All

- From the complete screen you'll enter the completion notes under **Tech Notes**.

- You will enter in the **Completion Date** and **Time** from the technician's notes, don't use the default date/time.

- Click **Save & Complete**.

Complete Work Order Request #407699

* indicates required fields

Completion Date*

Dec 30, 2024

Completion Time(PST)*

12:00 AM

Full Description

Input the full description for the request...

0/200

Tech Notes*

TEST Hd

7/200

Cancel

Save & Complete

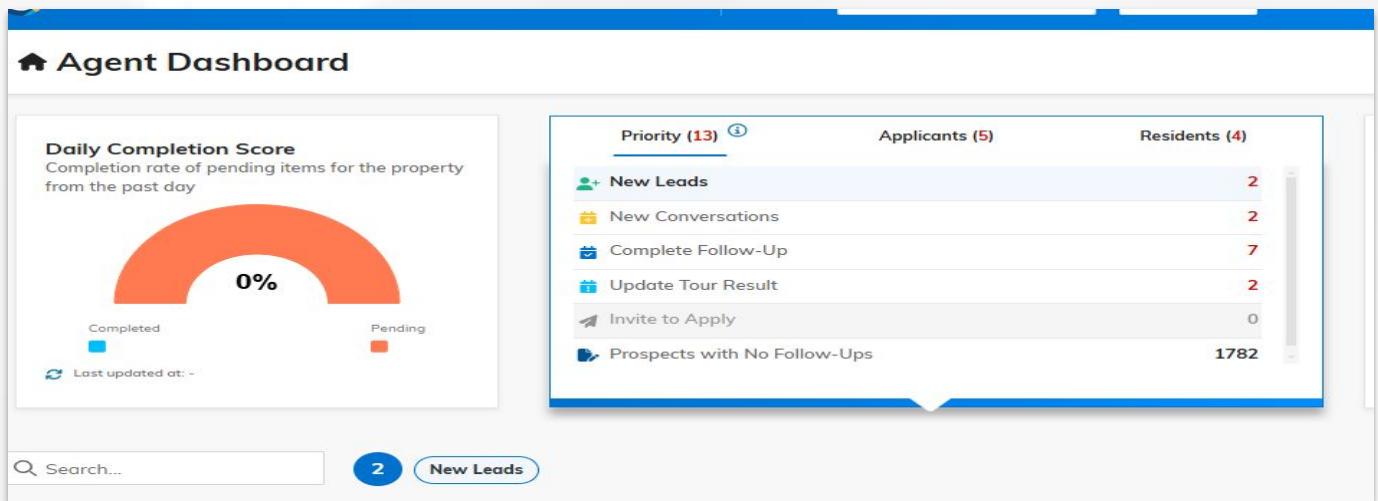
- The WO is now completed in Yardi and will no longer show on your dashboard.

If the WO had "chargeback" resident noted, then these charges should be added to their ledger and the resident notified of their balance due. You will then stamp the WO as "entered" and write your initials.

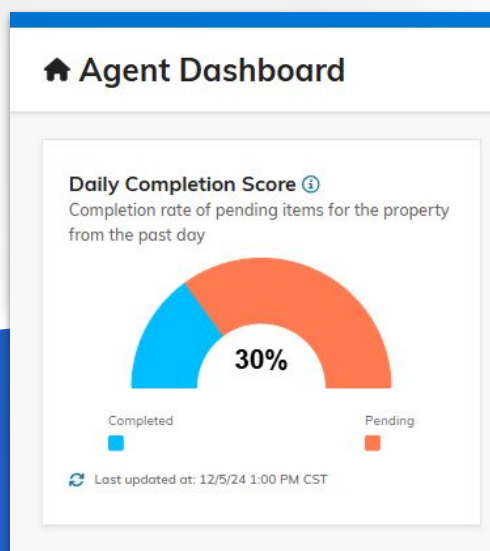
CRM IQ Queue



From the Agent Dashboard you can click in the Queue Box to manage your Queue. All boxes are set up to ensure nothing is missed. Your first step would be New Leads → New Conversations → Complete Follow-Up → Update Tour Result → and Invite to Apply. If the box is Greyed out there is no item to review. You will also find the Prospects with No Follow Ups in this box. These are to be worked when Traffic is low.



The Daily Completion Score tracks the Completion rate of pending items for the property. Your goal is to be at 100% before you leave for the day. You are able to refresh this about every 5 minutes.



CRM IQ New Leads



New Leads will be new prospect that has called, emailed, texted, or chat. You'll also likely see Vendors / Spam come through here. If it is a Vendor or Spam you can click the Trash Can (Not a lead) to Remove it.

If it is a lead you will click Assign and select an agent. If the next step is Convert then you'll see if there are any possible matches for this number or create a New Prospect.

Agent Dashboard

Daily Completion Score
Completion rate of pending items for the property from the past day
0%
Completed (Green) Pending (Red)
Last updated at: 12:00 PM

Priority (14) Applicants (5) Residents (4)

- New Leads: 2
- New Conversations: 2
- Complete Follow-Up: 8
- Update Tour Result: 2
- Invite to Apply: 0
- Prospects with No Follow-Ups: 1782

Event Type
Select events
Sun 1 Dec Mon 2 Dec Tue 3 Dec Wed 4 Dec Thu 5 Dec Fri 6 Dec Sat 7 Dec

Person	Conversation Type	Property	Agent	Desired Move In Date	Source	Next Step
Kevin Snow prospect	Web Request Dec 5, 2024	Cedar Ridge Apartment Homes	House	Move-In: Preferences: Any	Property Website First Contact Contact Reason: Request Details: FI	Assign
(No Name) Lead	Call Dec 5, 2024	Timbercreek East Townhomes		Move-In: Preferences: Any	Property Website	Convert

Lead Search

Keywords: 8162563445 Type: Everyone Property: Timbercreek East To... Unit: Select Unit Status: All More Search Save Clear

Name	Call	Phone Number	Contact	Property	Source
(No Name)	Listen	(816) 256 - 3445	Dec 5, 2024 7:01 PM	Timbercreek East Townhomes	Property Website

Search... 1 Records

Name	Person Type	Phone Number(s)	Email	Property	Unit Type	Unit	Link & Assign
Spam Call Spam	Prospect (Primary) Canceled Guest	(816) 256 - 3445		Timbercreek East Townhomes	None		Link

If there are no correct matches...

Click Create Prospect to create a new prospect record at this property.

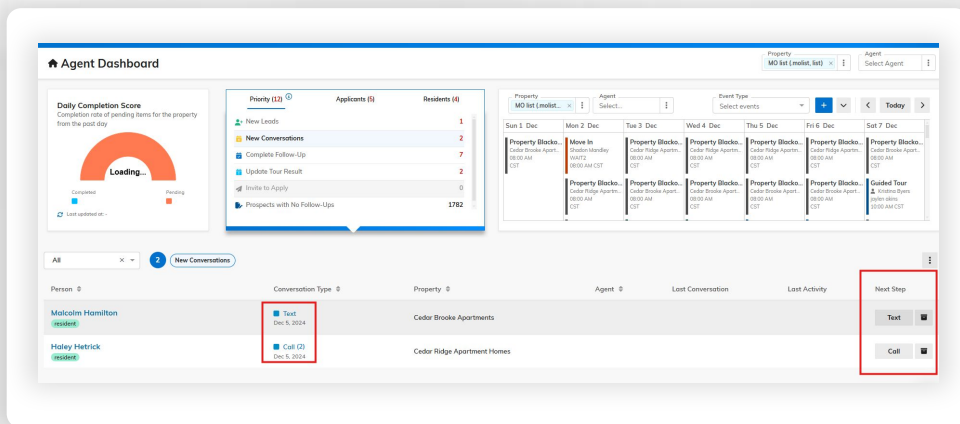
Create Prospect

CRM IQ

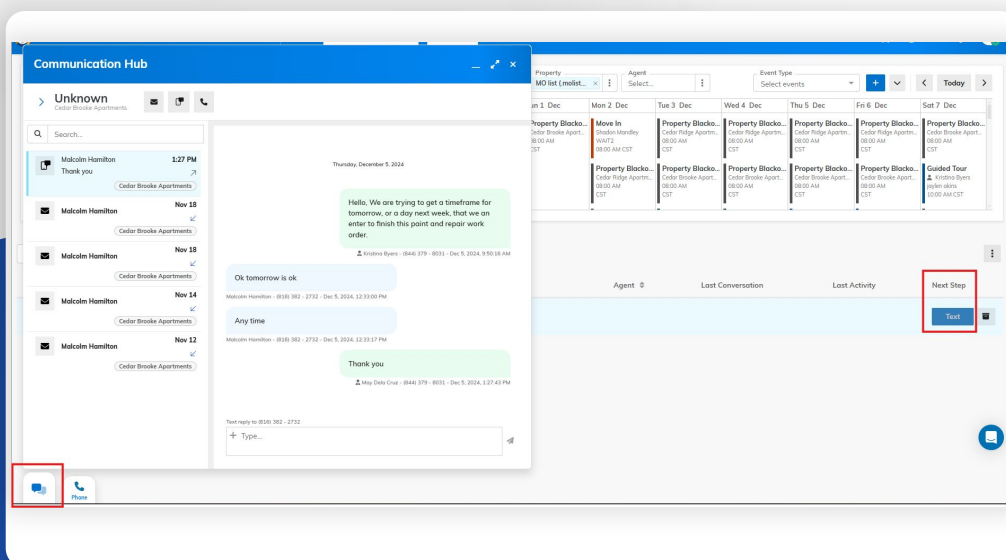
New Conversations



The Conversations box will be incoming calls, texts, or emails that are linked to a prospect or resident. Click the Blue hyperlink associated with the conversation to read or listen to the conversation. If it is something that has been address you can click Archive. If not you can respond by clicking the hyperlink or the word associated with the task under next step.



Once you click the hyperlink or the word associated with the next step the Com-Hub will pop up for you to respond. Note: You can access the Com-Hub no matter what screen you are in.



CRM IQ

Complete Follow-Up

The Complete Follow-up will be your Follow-ups for existing prospects for the day. You'll find the person's name, the follow-up details, property, agent, Last Conversation, last activity, and your next step. Be sure you're doing the correct task associated with the next step. If it says call you MUST call.

The screenshot shows the CRM IQ Agent Dashboard. The top section includes a 'Daily Completion Score' gauge, a 'Priority (11)' list, and a calendar view. The main section is titled 'Complete Follow-Up' and displays a table of follow-up tasks. The table has columns for Person, Follow-Up Details, Property, Agent, Last Conversation, Last Activity, and Next Step. The 'Next Step' column is highlighted with a red box, showing options like 'Call' and 'Email'.

Person	Follow-Up Details	Property	Agent	Last Conversation	Last Activity	Next Step
Namiah Ross prospect	Call - Final Follow Up Call Dec 5, 2024	Timbercreek East Townhomes	LeaAI LeaAI	Email Dec 3, 2024 New Year New Home! View/Reply		Call
Erika Miller prospect	Call Dec 5, 2024	Timbercreek East Townhomes Unit WAIT2	Christina Griffin	Email Nov 10, 2024 Get 1 Month Free! View/Reply		Call
Rachel Roland	Call Dec 5, 2024	Timbercreek East Townhomes	Christina Griffin	Email Nov 10, 2024 Get 1 Month Free! View/Reply	Agent Changed by Christina Griffin Oct 14, 2024 Notes: Agent changed to Christina Griffin R... View/Add	Call

Click the hyperlink associated with the Follow-up Details to complete the task. You can also click the pencil to edit or complete. Add your notes and click Complete.

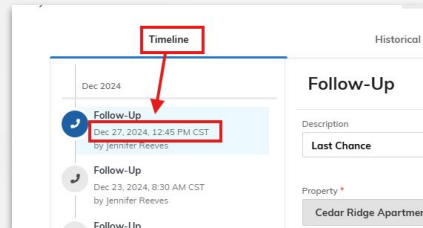
The screenshot shows the 'Follow-Up' form in the CRM IQ system. The form is titled 'Follow-Up' and has a search bar at the top. It contains fields for Description, Property, Unit, Customer, Agent, Channel, and Phone Result. The 'Description' field is highlighted with a red box, showing 'Final Follow Up Call'. The 'Property' field is 'Timbercreek East Townhomes (te)'. The 'Unit' field is empty. The 'Customer' field is 'namiah ross (Prospect - No Unit)'. The 'Agent' field is 'LeaAI LeaAI'. The 'Channel' field is 'Call'. The 'Phone Result' field is '--- Select ---'.



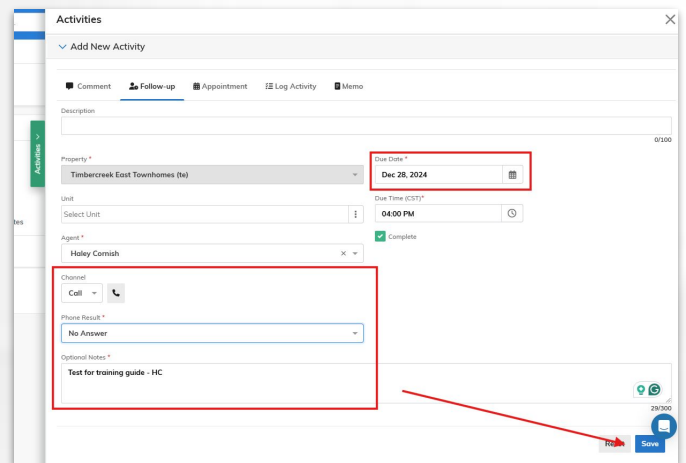
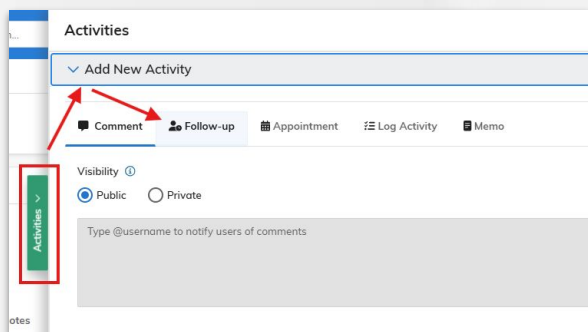
Deactivating Follow ups

We should NOT be deleting any guest cards out of our system. Instead, we need to deactivate the follow ups, so we aren't spamming prospects if they're uninterested.

NOTE : Use the last follow up due date to determine the date for the next activity.

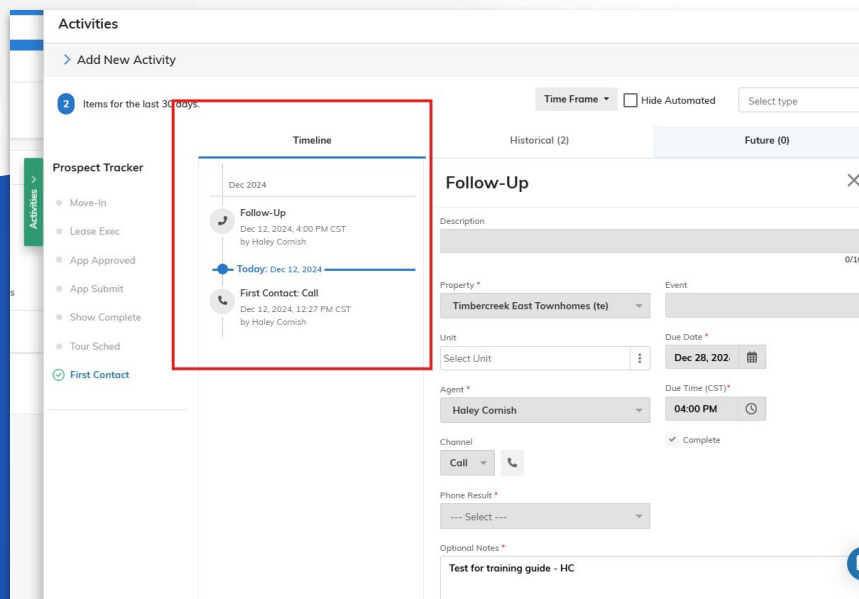


Once click Activities located on the right side of the profile view the timeline to determine the last follow up due. Then you'll click Add New Activity → Follow up → Change Due date to the day AFTER the last follow up → Select the channel, result, and add your notes → Click the Complete Box → Save.



Once completed

All follow ups will be auto completed and the logs will look similar to this.



CRM IQ

Update Tour Results

Once it's your appointment day your task will move to the update tour results box. If you showed the prospect click complete show. If they missed or had to reschedule click Reschedule.

The screenshot shows the CRM IQ dashboard. On the left, there's a 'Daily Completion Score' section with a progress bar. In the center, there's a 'Priority (12)' section with a list of tasks: 'New Leads', 'New Conversations', 'Complete Follow-Up', 'Update Tour Result' (highlighted with a blue bar), 'Invite to Apply', and 'Prospects with No Follow-Ups'. On the right, there's a calendar view showing events for the week of Dec 1-7, 2024. Below these, there's a table of prospects with columns: Person, Property, Appointment Agent, Prospect Created Date, Desired Move In Date, Last Conversation, and Last Activity. The table lists three prospects: Omer Martinko, J'aire Bozeman, and Terry Rainey. A red box highlights the 'Next Step' column, which contains 'Complete Show' buttons for each prospect.

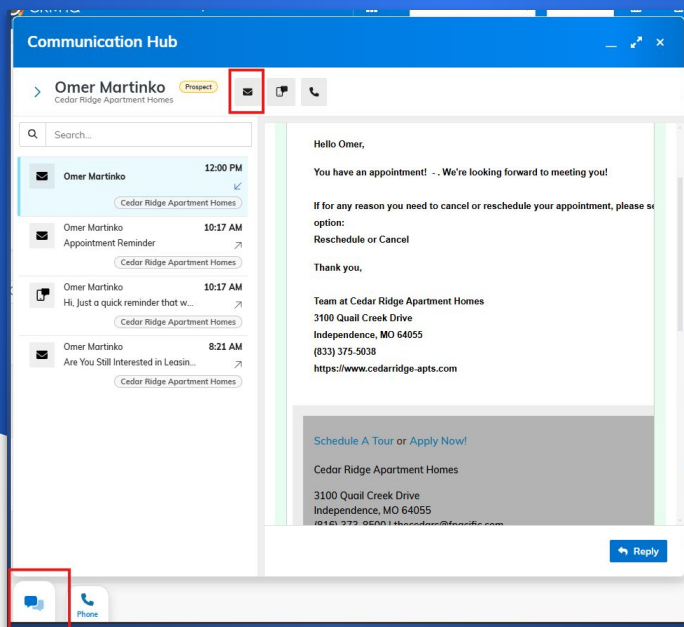
Once you click Reschedule you can change the date / time or if it was missed click the drop down and select your reason.

The screenshot shows the 'Appointment' form. At the top, there are buttons for 'Create Show' and 'Cancel Appointment'. Below these, there's a dropdown menu with a red box around it. The dropdown menu is open, showing options: 'Appointment Conflict', 'Blackout Conflict', 'Property Event Conflict', 'Missed', and 'Cancel'. The form fields include: 'Appointment Type' (set to 'Guided Tour'), 'Date' (set to 'Dec 5, 2024'), 'Available Timeslots' (set to '03:00 PM' to '03:30 PM'), 'From (CST)' (set to '03:00 PM'), 'To (CST)' (set to '03:30 PM'), 'Prospect' (set to 'Omer Martinko'), 'Agent' (set to 'May Dela Cruz'), and 'Description' (set to 'Looking for 2-3 bedroom w/ garage and storage, 1 occupant, no pet Jan-Feb'). A 'Save' button is at the bottom right.

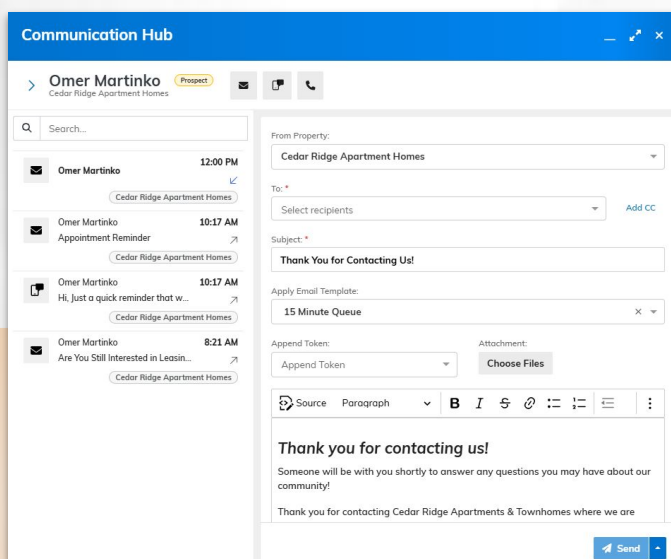
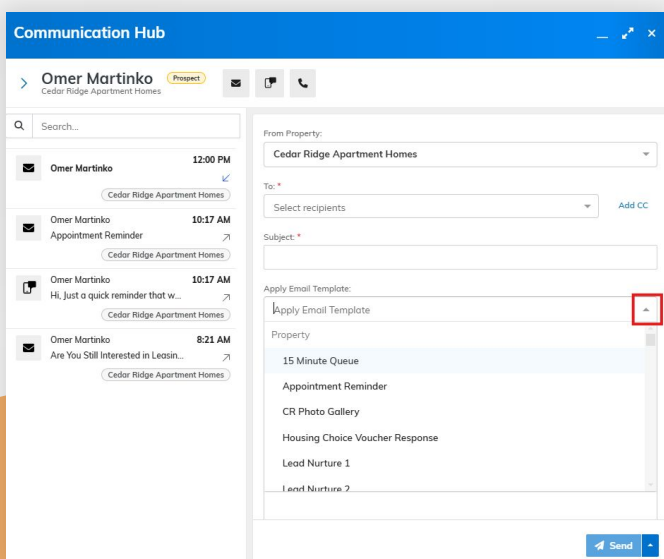
CRM IQ Email Templates

All email communications will be created directly from the Com-Hub. You have multiple ways to access this. You can search the prospect / resident, simply click the com-hub, or click on a task in your queue box to access it.

To send an Email, once the prospect / resident is selected and your Com-Hub is open click the email icon to start a new email.



Select the recipients and click the dropdown on Apply Email Template. This will open all of our active email templates. Simply select your template wait a few seconds and it will populate the Subject and body of the email. You can add attachments and CC if applicable.

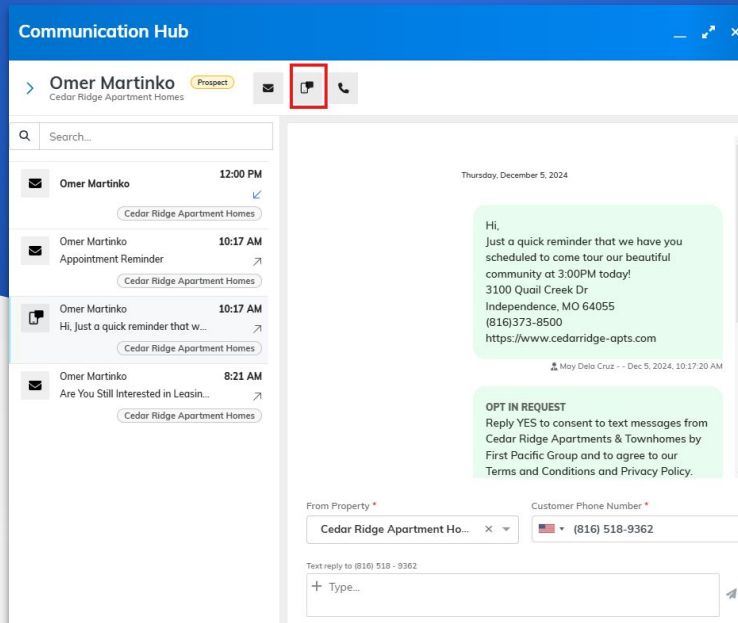


CRM IQ Text Templates

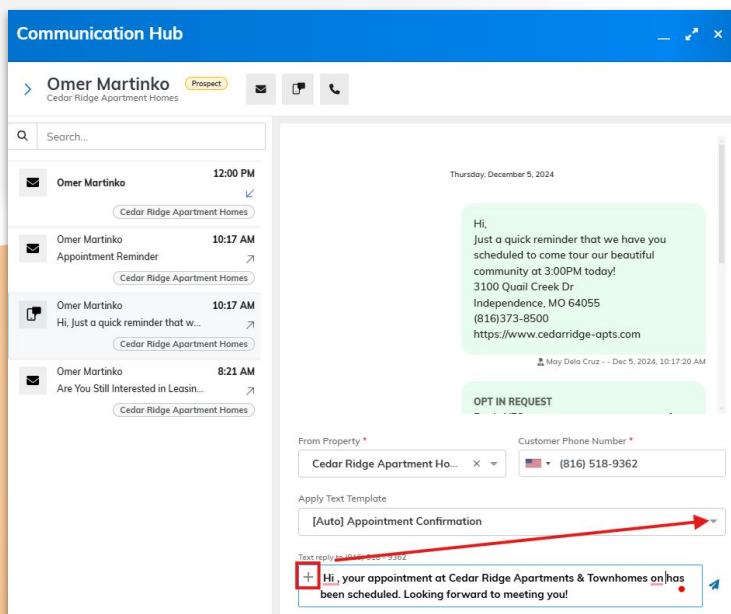
All email communications will be created directly from the Com-Hub. You have multiple ways to access this. You can search the prospect / resident, simply click the com-hub, or click on a task in your queue box to access it.

To send a Text, once the prospect / resident is selected and your Com-Hub is open click the Text Icon to send a text.

Note: If the prospect / resident hasn't opted in or has opted out you won't be able to send a text.



To add a pre-existing Template to the Text simply click the + which will bring the Apply Text template box up. Select your template, wait a few seconds, the message will add to the box, and click send. Pay close attention as information from you may need to be added.



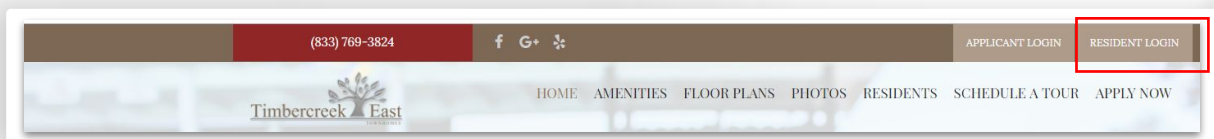
Resident Portal

The Resident Portal is where the Resident will conduct a majority of transactions for their account including the following items:

- Set up one-time and recurring payments
- Edit their profile
 - Update Email Address
 - Update Phone number
 - Subscribe to Email and SMS Notifications
 - Update vehicle Information
- Change Password
- Submit Maintenance and Office Requests
- Select lease renewal proposals
- Sign lease documents
- View documents and attachments
- Write Reviews
- View our Newsletter

NOTE : Changes to email address and phone number **MUST** be completed by the resident via the Portal. Updates to CRM and Voyager **DO NOT** sync.

Residents can log into their portal by accessing our Property Website and clicking the Resident Login button. This will take them to the Resident Services page.



From here, they will log into their account

Welcome to Resident Services

If your username is not an email address, [click here to login](#).

Email

Password

Sign In

[Forgot password?](#)
[Click here to register.](#)
[Send Verification Email](#)



Make Payments

Pay online, check the status of your payments and review your payment history.



Maintenance Requests

Submit online maintenance requests.



Technical Support

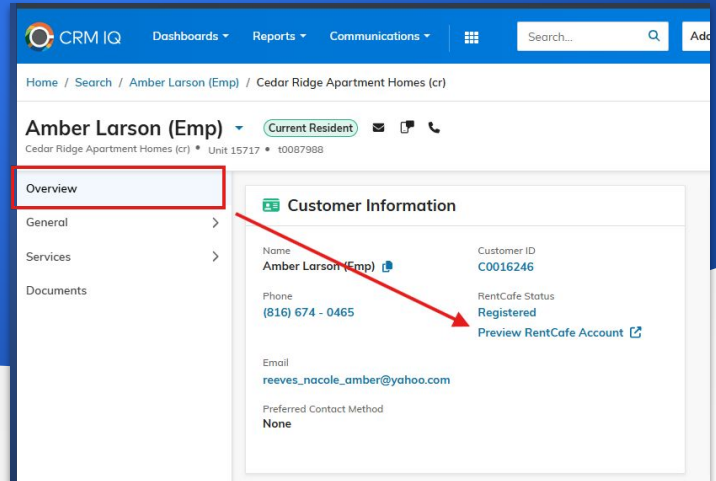
For technical support please email timbercreekeast@fpacific.com or call (816) 224-0404.

Resident Portal

From the Resident **Profile** page in CRM IQ, we have limited access to view the Resident's Portal as they would see it if they were logged in.

For the **Primary Resident**, in their Customer Information Box click Preview RentCafe Account under RentCafe Status.

Clicking the link will pop open the Resident Portal window.



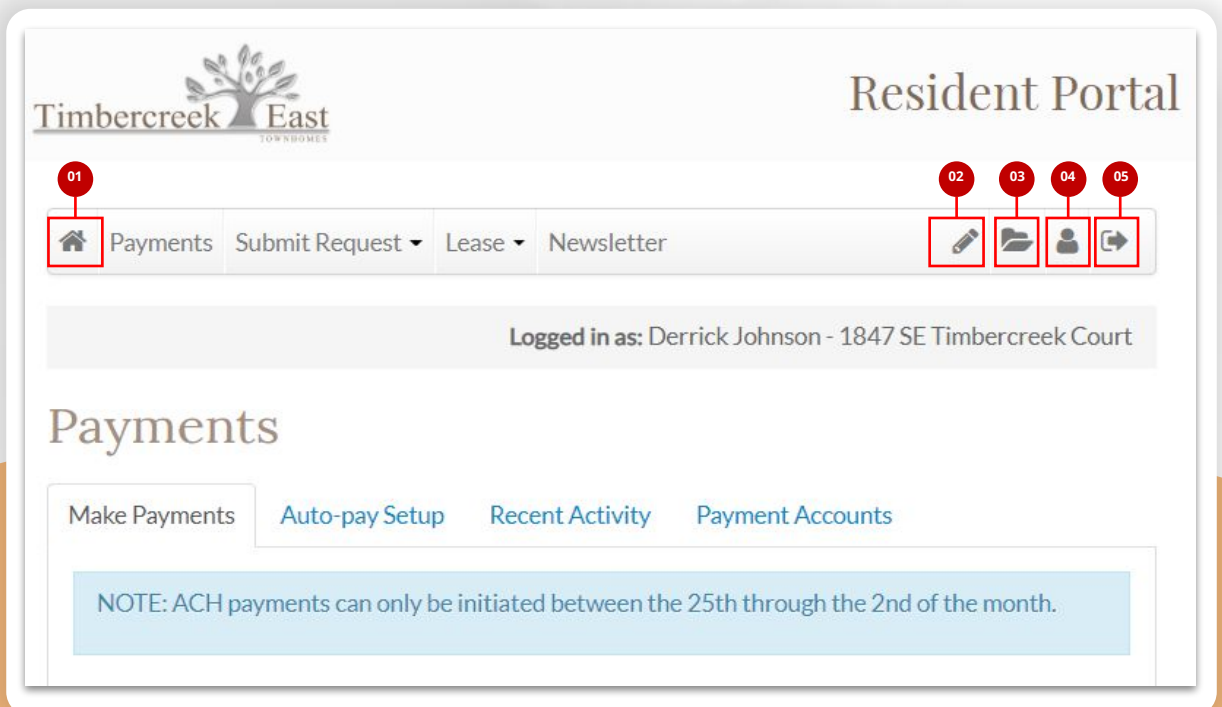
Home

Sign Documents

Online Documents

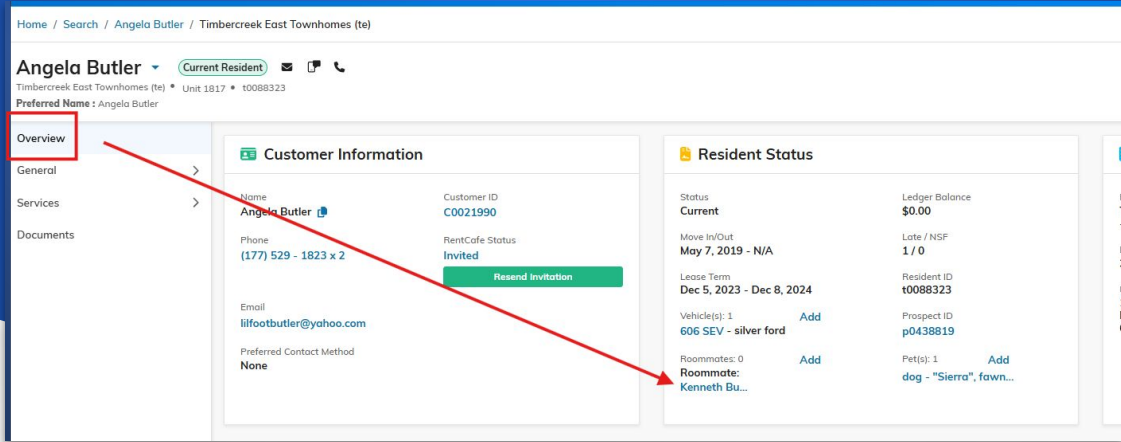
Profile

Sign Out



Resident Portal

To view a roommate's **Resident Portal**, you will click on the Roommate under the Resident Status Box.



Home / Search / Angela Butler / Timbercreek East Townhomes (te)

Angela Butler Current Resident Timbercreek East Townhomes (te) • Unit 1817 • t0088323

Preferred Name : Angela Butler

Overview (highlighted)

General >

Services >

Documents

Customer Information

Name: Angela Butler

Customer ID: C0021990

Phone: (177) 529 - 1823 x 2

RentCafe Status: Invited

Email: lilfootbutler@yahoo.com

Preferred Contact Method: None

Resident Status

Status: Current

Ledger Balance: \$0.00

Move In/Out: May 7, 2019 - N/A

Lease Term: Dec 5, 2023 - Dec 8, 2024

Vehicle(s): 1: 606 SEV - silver ford

Roommates: 0

Roommate: Kenneth Bu...

Click the three dots or kabob → View Customer Record → Open Resident Record → Preview RentCafe Account

Roommates Add Roommate

Current Roommates

Name	Phone Number(s)	Email	Occupant Type	Move In	Move Out	
Angela Butler	(177) 529 - 1823 x 2	lilfootbutler@yahoo.com	Primary	May 7, 2019		Edit
Kenneth Butler	(360) 318 - 5854	kenny.abutler@gmail.com	Roommate		Nov 13, 2024	Edit ⋮

Step 1

Contact Customer

View Customer Record

Home / Customer / KENNETH BUTLER

Customer Profile

KENNETH BUTLER

Customer ID: C0192749

Step 2

Quick Records

Resident

Property: Timbercreek East Townhomes

Status: Current

Last Contacted: Nov 13, 2024

[Open Resident Record](#)

Roommate

Property: Timbercreek East Townhomes

Status: Current

Last Contacted: Nov 13, 2024

[Open Roommate Record](#)

Prospect

Property: Timbercreek East Townhomes

Status: Current

Last Contacted: Nov 13, 2024

Home / Search / Kenneth Butler / Timbercreek East Townhomes (te)

Kenneth Butler Past Resident Timbercreek East Townhomes (te) • Unit 1817 • t0075878

Overview (highlighted)

General >

Services >

Documents

Customer Information

Name: Kenneth Butler

Customer ID: C0192749

Phone: (775) 291 - 8292

RentCafe Status: Registered

Email: kenny.abutler@gmail.com

Preferred Contact Method

[Preview RentCafe Account](#)

Step 3



Reset Resident Portal Password

If a resident cannot access their Online Resident Portal, we have the option to reset their password on their behalf. From the Resident **Profile** screen, click RentCafe → 3 dots or kabob → Change Password

Roommate	Email	Invite Status	Result	Account	Actions
Angela Butler Primary	liifootbutler@yahoo.com	Invited	Account Verified		Resend Invitation Change Password
Kenneth Butler Roommate	kenny.abutler@gmail.com	Registered	Account Verified		Resend Invitation

Under the **Change Password** field, enter **Password123!** which is the default password we will always use to reset a password. Enter **Password123!** in the **Confirm Password** field and click **Update Password**.

Change Password

Email Address: liifootbutler@yahoo.com

New Password:

Confirm Password:

Update Password

The resident should now be able to log in and they can change their password from their **Online Profile** screen.

Payments Submit Request Lease Newsletter

Logged in as: Derrick Johnson - 1847 SE Timbercreek Court

My Profile

Edit Profile **Change Password**



Resident Portal

Payment accounts

The resident has several options to make payments to their account since we do not accept any paper payments.

Bank Account – Checking or Savings

WIPS – Walk In Payment System

Credit / Debit Card

Flex (splits payments in 2)

Residents will need to set up their Payment Accounts from their Resident Portal if they wish to use their Bank Account, Debit Card or Credit Card.

Click the **Payment Accounts** button under the **Payments** section of their **Resident Portal**. Next click the **Add Bank Account**, **Add Credit Card** or **Add Debit Card** buttons.

Payments

Make Payments

Auto-pay Setup

Recent Activity

Payment Accounts

Bank Accounts

Add Bank Account

Use the bank accounts listed below to schedule monthly automatic payments.

Name on Account	Bank Transit Number	Bank Account Number	Account Type	Edit	Delete
No data available in table					

Showing 0 to 0 of 0 entries

Credit Cards or Debit Cards

Add Credit Card

Add Debit Card

Use the credit cards or debit cards listed below to make one-time payments or schedule monthly automatic payments.



Payment Accounts

Bank Account

To add a bank account, the Resident will need their **Account Name**, **Routing Number**, **Account Number** and know if it is a **Checking** or **Savings Account**. They will enter the information and click the **Save** button.

Add a Bank Account

[Back to Payment Accounts](#)

Joe Smith 1234
1234 Anystreet Court 1234
Anycity, AA 12345

Pay to the order of _____ Dollars

Bank Anywhere
123456789 123456789123 1234

Routing Number Account Number Check Number

Account Name

Routing Number (9 digits)

Confirm Routing Number

Account Number (3-17 digits)

Confirm Account Number

Account Type

Save

Checking Account



Payment Accounts

Credit or Debit Card

If the resident is setting up a Credit or Debit card account, when they click **Add Credit Card** or **Add Debit Card**, it will direct them to **Yardi Card Services** in a new window. They will need to enter their **Card Number**, **Name on the Card**, **Expiration Date**, **CVV Code** and **Billing Address**. They are required to check the **Terms & Conditions** box then click the **Save** button.

YARDI CARD SERVICES

Card Details

CARD INFORMATION



Card Number *

Name on the Card *

Exp Date *

Month

Year

CVV Code *

BILLING ADDRESS

Country

United States

Address Line 1

Address Line 2

City

State

State

Zip

☐ I have read & agree to the terms & conditions.

Fields marked with (*) are required.



Cancel

Save

The information on this form is collected to process a payment card transaction. It will be stored on our secure servers in Texas. For information about this collection or how to obtain access to or correct your personal information you may contact our privacy officer at privacy@yardi.com.

Page | 90



One-Time Online Payments

Once the resident has set up their **Payment Accounts**, they can make **One-time Payments** or set up **Auto-pay**.

To make a **One-time Payment**, click the **Pay Now** button under the **Make Payments** tab.

Payments

[Make Payments](#) [Auto-pay Setup](#) [Recent Activity](#) [Payment Accounts](#)

NOTE: ACH payments can only be initiated between the 25th through the 4th of the month.

Current Balance: \$0.00

As of: 12/17/2018

Charge	Amount	Charged on
December Monthly Charges		

Missing a payment can be expensive.

Set up auto-pay >

Pay Now

Select the payment account under the drop down **Select Payment Account** and enter the **Payment Amount**. Click **Next**.

One-Time Payment

[Payment Options](#) » [Payment Details](#) » [Review Payment](#) » [Confirmation](#)

A service fee will be charged at the time of payment for Debit Card and Credit Card transactions. The property management company does not receive any portion of this fee. Service fee is non-refundable.

You have a \$0 or credit balance on your account. If you make a payment now it will be included as an "Unapplied Credit" within the Payments menu under Current Outstanding Charges.

Add Credit Card

Add Debit Card

Enter Payment Details

Select Payment Account

Extra Payment Amount

Next

---Select Payment Account--

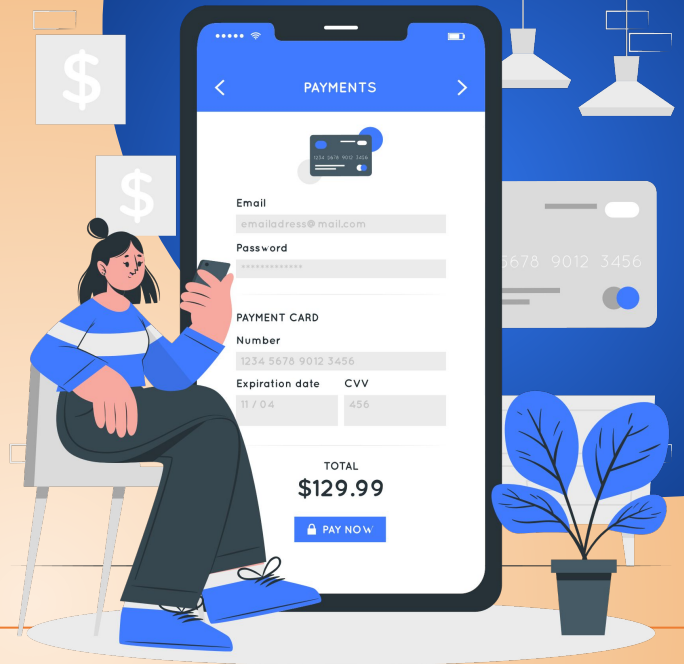
---Select Payment Account---

Amex XXXX-1252

Visa XXXX-4293



One-Time Online Payments



This will take them to the **Payment Details** screen where they will need to check the **Terms and Conditions** box and then click the **Submit Payment** button.

One-Time Payment

Payment Options » Payment Details » Review Payment » Confirmation

Payment Details

Payment Account	Visa XXXX-4293
Extra Payment Amount	\$10.00
Service Fee ⓘ	\$2.95
Total Amount	\$12.95

Service fee is non-refundable.

PLEASE READ THIS ENTIRE AGREEMENT BEFORE PROCEEDING. BY CLICKING ON THE "SUBMIT" BUTTON BELOW, YOU ACCEPT THE TERMS AND CONDITIONS. IF YOU DO NOT ACCEPT THESE TERMS, DO NOT CLICK "SUBMIT" BELOW.

☐ I have read and accept the Terms and Conditions

[Back to Payment Details](#) [Submit Payment](#)

The resident will be taken to the **Confirmation** page once their payment has been successful.



Auto-Pay Online Payments

Recurring **Autopay** can be set up so that the resident does not have to worry about logging in each month and making their payments. You should promote the **Online Auto-pay set up** to each new and renewing resident.

To set up **Auto-pay**, click the **Auto-pay Setup** button under the **Payments** section in the **Resident Portal**. Select the **Payment Account**, **Start Date**, **Pay on Day**, and **Percentage %**. Click the **Next** button.

NOTE: If anything, other than 100% is entered under the Percentage, a roommate MUST create an Auto-pay Set up for the remaining percentage. If total of 100% is not set up between primary and roommates, **NO PAYMENT WILL PROCESS.**

Payments

Make Payments Auto-pay Setup Recent Activity Payment Accounts

A service fee will be charged at the time of payment for Debit Card and Credit Card transactions. The property management company does not receive any portion of this fee. Service fee is non-refundable.

i Your average monthly charges are \$490.00/month.

Payment Account	Start Date	End Date	Pay on Day	Percentage %
Select Payment Account ▼	1/1/2019		1st ▼	100.00%

Next

Auto-pay Setup

Your first payment is scheduled for 1/1/2019

Payment Account	Start Date	End Date	Pay on Day	Percentage %
Visa XXXX-4293	1/1/2019		1st	100%

A service fee of \$2.95 per transaction will be charged at the time of payment. The property management company does not receive any portion of this fee. Service fee is non-refundable.

You authorize to have the above amount withdrawn from your selected payment account every month under the specified Terms and Conditions until you cancel your authorization.

☒ I have read and accept the [Terms and Conditions](#)

Cancel

Set Up Auto-Pay

This will bring up the **Auto-pay Set Up** a confirmation. Check the **Terms and Conditions** box and then click the **Set Up Auto-Pay** button.

WIPS | PayNearme

WIPS or Walk In Payment System is available for all residents to use but is more likely going to be used for residents who do not have a bank account or Credit or Debit card or residents who prefer to pay their rent in Cash.

WIPS accounts are generated for all Applicant-Approved, Future, Current, and Notice residents. Residents will receive one WIPS number. The resident will receive automated email with their account number and instructions on making payments at an Authorized WIPS Store.

If a resident ever forgets their WIPS account number, they can access it in their Resident Portal by clicking on the Payment Accounts tab and scrolling to the bottom of the page.

Payments

[Make Payments](#)[Auto-pay Setup](#)[Recent Activity](#)[Payment Accounts](#)

Walk In Payment System

Your WIPS Account# is 20002349177.

To locate a store that accepts payments, contact your Property Manager for a list of locations, or go to: <http://www.checkfreepay.com/agentlocator> and select WIPS Rent Payments as the biller to find a location near you.

You can also advise the resident of their WIPS Account number by clicking on the WIPS Setup button within their CRM account. Click their WIPS number and a new screen will populate.

t0082923

Bertha

Montesino

220080566205

Auto generated via Collect

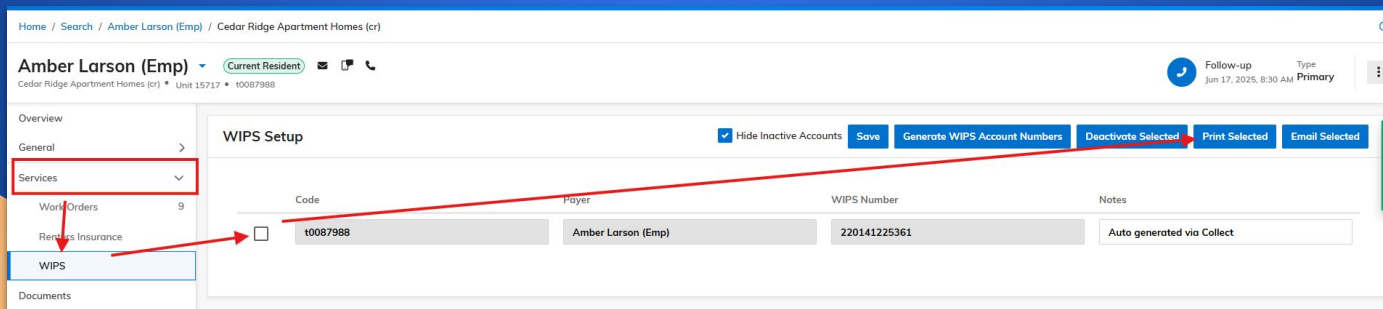


Save

Edit

WIPS | PayNearme

Once you go to the resident's account click services → WIPS → Check your resident → Print Selected.



Home / Search / Amber Larson (Emp) / Cedar Ridge Apartment Homes (cr)

Amber Larson (Emp) Current Resident Follow-up Jun 17, 2025, 8:30 AM Type Primary

Cedar Ridge Apartment Homes (cr) • Unit 15717 • t0087988

Overview

General >

Services ▾

Work Orders 9

Renters Insurance

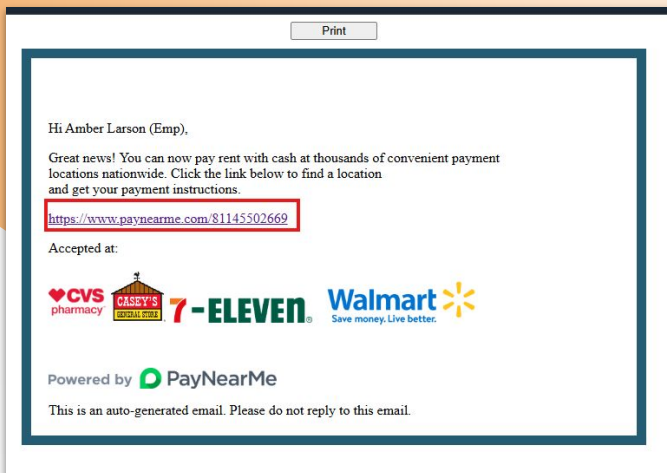
WIPS

Documents

WIPS Setup Hide Inactive Accounts Save Generate WIPS Account Numbers Deactivate Selected Print Selected Email Selected

Code	Payer	WIPS Number	Notes
☐ t0087988	Amber Larson (Emp)	220141225361	Auto generated via Collect

Once the new screen opens click the hyperlink → send to phone OR print instructions. (see next page for details)



Print

Hi Amber Larson (Emp),

Great news! You can now pay rent with cash at thousands of convenient payment locations nationwide. Click the link below to find a location and get your payment instructions.

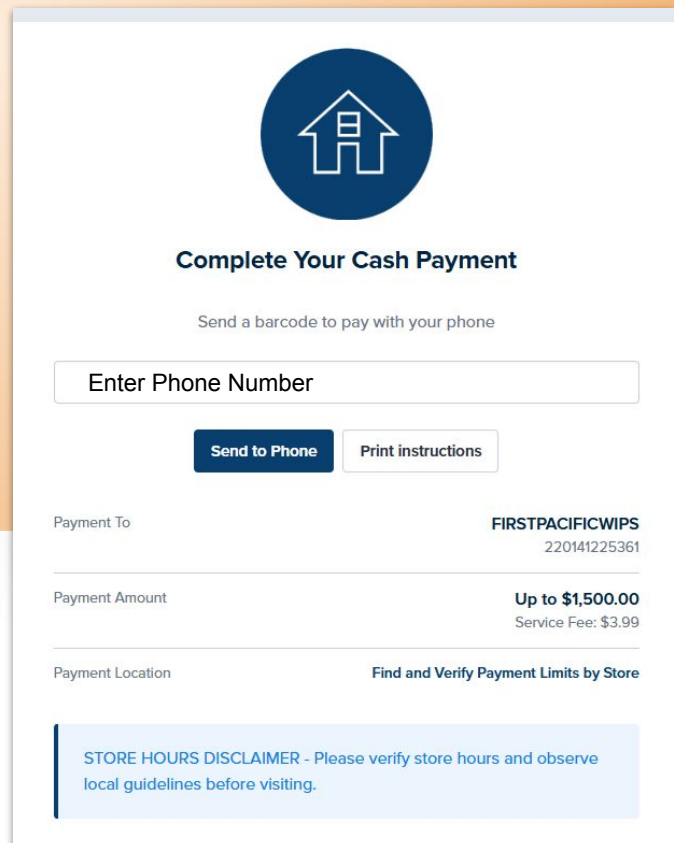
<https://www.paynearme.com/81145502669>

Accepted at:

    Save money. Live better.

Powered by  PayNearMe

This is an auto-generated email. Please do not reply to this email.





Complete Your Cash Payment

Send a barcode to pay with your phone

Enter Phone Number

Send to Phone Print instructions

Payment To **FIRSTPACIFICWIPS**
220141225361

Payment Amount **Up to \$1,500.00**
Service Fee: \$3.99

Payment Location **Find and Verify Payment Limits by Store**

STORE HOURS DISCLAIMER - Please verify store hours and observe local guidelines before visiting.

WIPS | PayNearme

- A list of pay locations will be available on the printed slip.
- The resident will be able to pay over, under, and in advance.
- Resident's can pay up to \$1,5000. If the amount is more the resident will have to make multiple payments.
- The service fee is set at \$3.99 per transaction.
- Residents will receive ONE barcode per home. If there are multiple residents in the home, they will need to share the barcode or give their money to one person to make the payment.

PayNearMe Cash PaySlip



FIRSTPACIFICWIPS

- Bring this PaySlip to a participating store
- Ask them to follow the instructions for their store
- Keep your receipt
- Tenant ID: 220073587184

**You Pay
Any Amount
(a \$3.99 fee will be added)**

CVS Cashier Steps






1. Scan the barcode
2. Ask the customer how much they want to pay
3. Enter the amount(a \$3.99 fee will be added)
4. Collect cash from the customer
5. Give the customer their receipt

7-Eleven Associate Steps






1. Ask Customer for amount to load
2. Press OTHER FUNCT, then LOAD
3. Scan barcode
4. Get payment from customer
5. Give customer receipt and slip

ACE Sales Associate Steps



1EK-ABZ

1. Go to Option 4: Bill Pay on your POS
2. Enter PayNearMe or biller code PYN on your biller search screen
3. Enter this token number **1EKABZ** and select Get Order List.
Advise customer of payment amount(s)
4. Get payment from customer
5. Give customer receipt and slip

Casey's Sales Associate Steps






1. Scan the barcode
2. Enter the amount
3. Touch 'Recharge'
4. Touch 'OK'
5. Tender transaction, give customer receipt
6. Print receipt for shift envelope

Walmart Sales Associate Steps





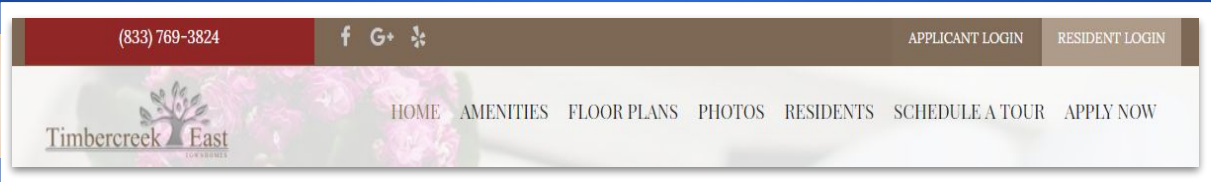

1. Press Cash In on the Financial Services Tab
2. Scan Barcode
3. Enter amount and follow register prompts
4. Give customer receipt and PaySlip

PayNearMe cash payment help 888-714-0004 (Payment Code 1EKABZ)

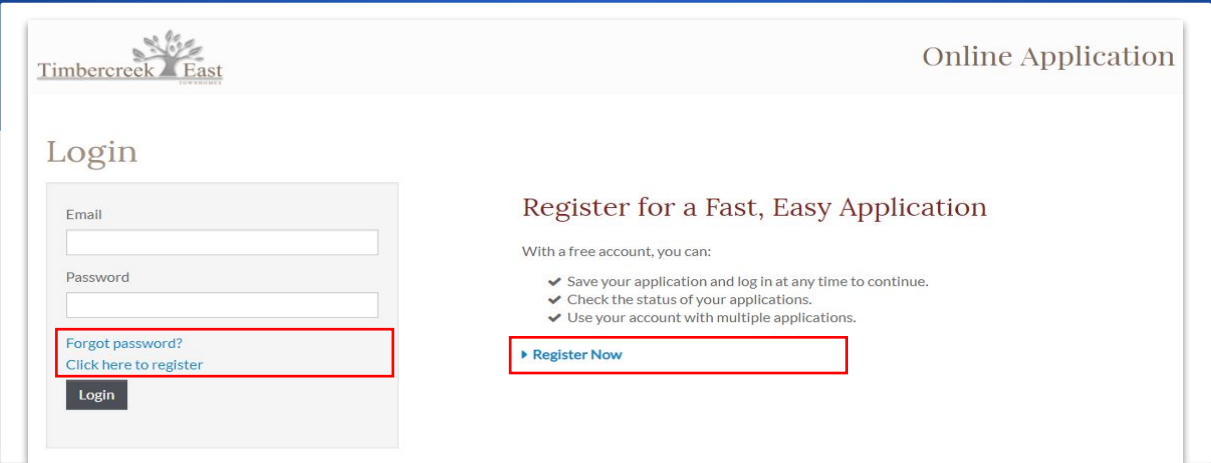


Online Application

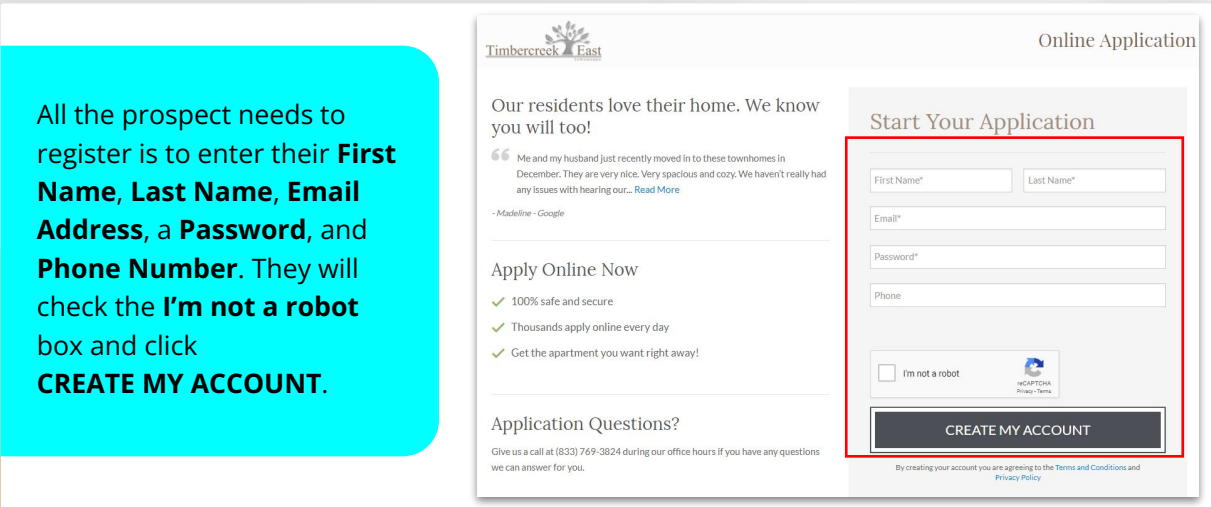
All applications should be completed online via our Property Website.
Applicants will click the Applicant Login button on the Property Website.



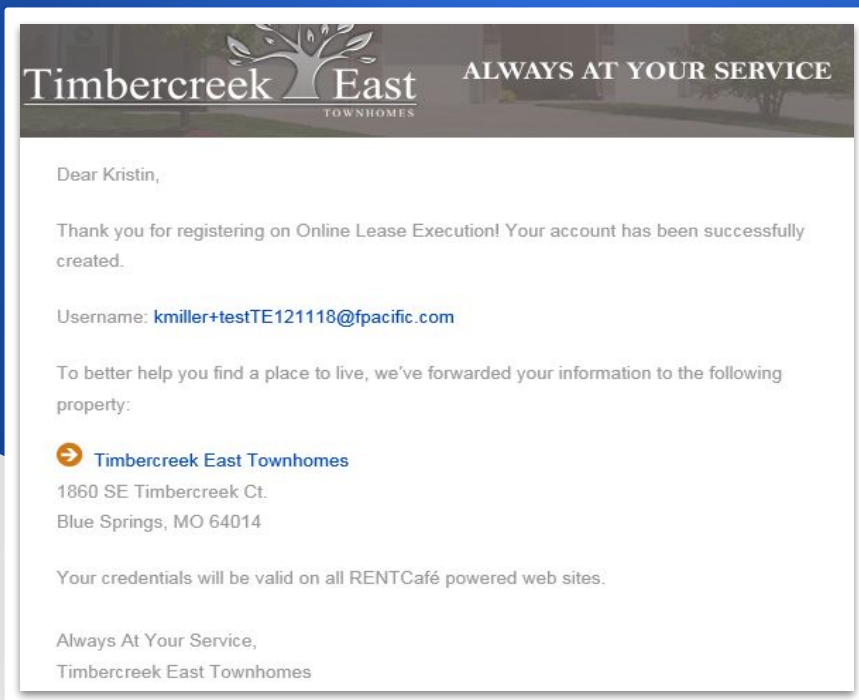
This will open up a new window where they can Log In or Register.



If a prospect already has a guest card created, you should have clicked the **Invite to RentCafe** button in CRM to send them the registration email. If they do not have a registration email, they will click the **Register Now** button or the **Click here to register** as they both take you to the same screen.



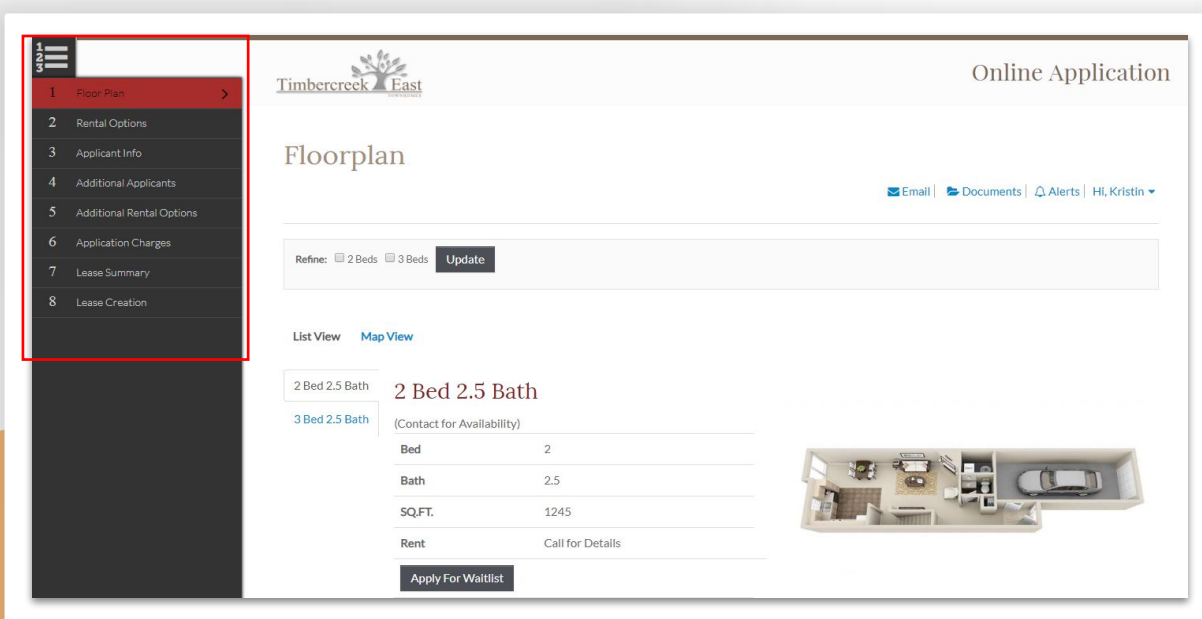
Online Application



Once the prospect creates their account, they will receive a **User Registration**

Confirmation autoresponder email with their Username listed.

The Prospect will be logged into the **Online Application** portal. The Left-side shows the steps needed in order to complete the application process.



Online Application



Floor Plan- Prospect needs to select a floor plan or Apply for the Waitlist. Click Continue.

01

Refine: ☐ 2 Beds ☐ 3 Beds

List View Map View

2 Bed 2.5 Bath 3 Bed 2.5 Bath

3 Bed 2.5 Bath (1 Available)

Bed	3
Bath	2.5
SQ.FT.	1350
Rent	\$1,090 - \$1,190

02

Floor Plan- Prospect needs to select a floor plan or Apply for the Waitlist. Click Continue.

Apartments

Email Documents Alerts Hi, Kristin

Grid View Map View

Beds Baths Floor Plans

Floor Plan : 3 Bed 2.5 Bath - 3 Bedrooms, 2.50 Bathrooms [View Floor Plan](#)

Don't see the apartment or move in date you want, click here to be put on a wait list for this floorplan

Apartment	Sq.Ft.	Rent	Date Available	Action
#1740	1350	\$1,090-\$1,190	3/2/2019	Live Here

They will then select their **Lease Term** and click **Continue**.

Floor Plan: 3 bedrooms / 2 bathrooms | 1,350 sq. ft. | 3 Bed 2.5 Bath [Change](#)

Move-in Date: 3/2/2019

Lease Term: 12 months

3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18

Current Selection/Best Value

\$1,115/month

Includes Trash [view details](#)

lease term: 12 months

Move-In Date: 3/2/2019



Online Application

03

Applicant Info- All Prospects will need to review and sign the **Rental Qualifications** by clicking the **Sign** button.

This will bring up the **Online Rental Qualifications Document**. The Prospect will need to click on the **Create Signature** button to create a signature to sign the document.

This will bring up a window where they can select from a list of pre-generated signatures. They need to select a Signature, Accept the Terms and hit the Save Signature button.

Online Application



Once the signature is saved, they can click the **Sign** button and **Date** button to sign the document.

Once all signature and date requirements are completed, they will then click **Submit Document**.

This will update the **Rental Qualifications Document** as **Complete** in the application process. Click the **Continue** button.

This will take the Prospect to the **Online Application** where they will fill in their **Personal Information, Address Information, Employment Information, Screening Information, Pet Information, Vehicle Information, and Emergency Contact**.



Online Application

Once all applicant information is entered, the Prospect will **Agree** to the terms by checking the box next to **By signing this application, I agree that the information provided in this application is true and correct.** They will create a signature using their mouse or if on a tablet, their finger and clicking **Save & Continue.**

Agreement

☒ By signing this application, I agree that the information provided in this application is true and correct.*

Create your signature in the boxes below.

Clear

Your signature

Save

Save & Continue

* Required field

04

Additional Applicants- The main applicant has the opportunity at any point in the application process up to approval to add an additional applicant through their portal. **NOTE:** It is recommended that the main applicant add all additional roommates themselves and the on-site team NOT add any additional roommates.

Click the **Add Applicant** button to add additional roommates. If no roommates are being added, click **Continue.**

4 Additional Applicants >

5 Additional Rental Options

6 Application Charges

7 Lease Summary

8 Lease Creation

- If you have additional applicants, you can add them here.
- Primary applicant will be required to pay the fees for ALL applicants. Applicant details need to be added, please send an email invitation to your co-applicant using the link below.

Add Applicant

Continue

Online Application



05

The main applicant will enter the **First Name** and **Last Name** of their roommate, click if they are **18 or Older**, select their **Relationship** and click **Add**. **NOTE: If they are adding occupants under the age of 18, the main applicant will enter the information.**

- If you have additional applicants, you can add them here.

- Primary applicant will be required to pay the fees for ALL applicants. Applicant details need to be added, please send an email invitation to your co-applicant using the link below.

Additional Applicant 1

[Remove](#)

First Name	Last Name	18 or Older	Relationship	Actions
John	Doe	Yes	Roommate	Add

Status: Send an email invitation to applicant above 18 years. You can add the details for applicant below 18 years.

Once the **Add** button is clicked, it will save the additional applicant's information. Click the **Send Invitation** button. This will open up additional fields to enter the Additional Applicant's **Email Address**. Click **Send Email**. If more additional applicants are needed, click the **Add Another Applicant** button and follow the same process. If no additional applicants, click **Continue**.

Additional Applicant 1

[Remove](#)

First Name	Last Name	18 or Older	Relationship	Actions
John	Doe	Yes	Roommate	Save

Status: Applicant details need to be added. Send an email invitation to this applicant

Email Address *

Re-enter Email Address *

Message



Online Application

06

Application Charges- We require a Photo ID to continue the application process as well as two current pay stubs to be uploaded. Prospect will need to upload these documents and then click the **Continue** button.

4

Additional Applicants

5

Additional Rental Options

6

Application Charges

7

Lease Summary

8

Lease Creation

Picture ID

Kristin Miller (Primary)

Choose Files No file chosen

Proof of Income 1

Kristin Miller (Primary)

Choose Files No file chosen

Proof of Income 2

Kristin Miller (Primary)

Choose Files No file chosen

Continue

This will take them to the payment screen where they will be required to add a **Debit** or **Credit Card**. They will click the **ADD DEBIT CARD** or **CREDIT CARD** button.

1

Floor Plan

2

Rental Options

3

Applicant Info

4

5

6

7

8

Payment Details

Charge Description	Charge Amount	Amount Paid	Balance Due	Paid By
Application Fee (Kristin Miller)	\$50.00	\$0.00	\$50.00	
Admin Fee (Kristin Miller)	\$150.00	\$0.00	\$150.00	
Security Deposit (Kristin Miller)	\$350.00	\$0.00	\$350.00	
Total Amount (before tax)			\$550.00	

Pay By Debit Card

Select the Add Debit Card button to make a payment.

+ ADD DEBIT CARD

Alternatively, you may enter your

CREDIT CARD

 information to make a payment.

Problems adding a credit card? You may need to enable TLS

This will bring them to the **Yardi Card Services** window to enter their card information. Once all information is entered, they will need to hit **Save**.

YARDI CARD SERVICES

CARD INFORMATION

CARD NUMBER

VISA

AMEX

DISCOVER

CARD NUMBER

NAME ON THE CARD

EXP DATE

CVV CODE

BILLING ADDRESS

COUNTRY

UNITED STATES

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

ZIP

I have read & agree to the terms & conditions.

Fields marked with (*) are required.

Cancel

Save

Company Details

TIMBERCREEK EAST TOWNHOMES

Tel: 816-373-8500

Email: timbercreekeast@tpacific.com

Online Application



Once their payment information is entered, it will bring them back to the Payment screen where their payment method will be listed. Click the Proceed to Payment button.

Pay By Debit Card

 Select the Add Debit Card button to make a payment.

+ ADD DEBIT CARD

Pay With Your Existing Account

 Visa XXXX-1008
[Edit](#) [Delete](#)

Proceed to Payment

This will bring them to the **Payment Details** section where they will need to check the boxes to **Agree to the Terms**. Then click **Submit Payment**.

Payment Account

 Visa XXXX-1008 [change](#)

Payment Details

Charge Description	Charge Amount	Balance Due
Application Fee - Criminal Screening (Fred Jones)	\$20.00	\$20.00
Application Fee - Credit Screening (Fred Jones)	\$20.00	\$20.00
Admin Fee (Fred Jones)	\$200.00	\$200.00
Total Amount		\$240.00

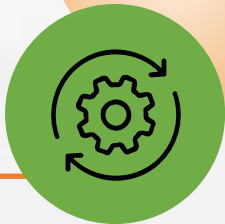
☐ I agree to the Terms & Conditions and understand that I will have to agree to the Terms and Conditions of the Payment Center too.
☐ Application fees are non-refundable, even if the application is denied, except to the extent otherwise required by applicable law.

Submit Payment

A **Payment Confirmation** screen will come up with their payment details and they will also receive a confirmation email. The Property will also receive an email notification of the application.

Criminal and Credit Screening is set up to automatically run once all fees have been paid and all applications submitted. Refer to the CRM to Screening Works instructions for additional workflow information.

CRM IQ Screening Process



Once an applicant completes the application online and pays for all applicable fees, the system will automatically push through the screening through ScreeningWorks.

Access the Pending Application under your Applicants Queue Box. Start at Needs Screening/Evaluation.

Agent Dashboard

Daily Completion Score

78%

Priority (22)

Applicants (6)

Residents (4)

Needs Screening/ Evaluation

Property

MO list (molist, list)

Agent

Select Agent

Event Type

Select events

Today

Person

Screening Result

Property

Roommates

Roommates Ready For Screening

Dates

Next Step

Adison Cates

Accepted

Timbercreek East Townhomes

Davey Brannon

Davey Brannon

Applied: Dec 5, 2024

Evaluate

Rachel Page

Conditional

Cedar Ridge Apartment Homes

Steven Easley

Steven Easley

Applied: Nov 24, 2024

Evaluate

Once you click Needs Screening/Evaluation the applicants will populate below. This will show their Name, Screening Result, Roommates Name, Roommates Screening Status, The date they applied, and their Move-in date

Agent Dashboard

Daily Completion Score

78%

Priority (22)

Applicants (6)

Residents (4)

Needs Screening/ Evaluation

Property

MO list (molist, list)

Agent

Select Agent

Event Type

Select events

Today

Person

Screening Result

Property

Roommates

Roommates Ready For Screening

Dates

Next Step

Adison Cates

Accepted

Timbercreek East Townhomes

Davey Brannon

Davey Brannon

Applied: Dec 5, 2024

Evaluate

Rachel Page

Conditional

Cedar Ridge Apartment Homes

Steven Easley

Steven Easley

Applied: Nov 24, 2024

Evaluate

Click on the **Applicant's Name or Evaluate** to access their Profile / Screening. Click the > icon to drop down the results and to be able to access the screening report. Click View Report to open the screening report.

Adison Cates

Overview

Prospect Workflow

Applicant Workflow

Documents

Ledger

Screening

Evaluate Application

Consolidated Results

Result

Reason

Accepted - Base Deposit

Completed On

Dec 5, 2024

Screening Report Setup

Confirm the information for each applicant to be included in the report. All applicants must be ID Verified to be included in a screening report.

Run Report

Applicant

Type

Adison Cates

Applicant

Consent/Photo ID Confirmed

Include in Report

Screening Report Results

Report

Report Details

Applicants

Date Completed

Result

Yardi Screening

ID: 72326473_1

By: SBO

Adison Cates,Davey Brannon

Dec 5, 2024

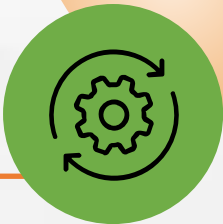
Accepted

View Report

Update Results

CRM IQ

Screening Process



From the initial page of the **Property Screening Result**, you will click on the Applicant's name to view additional details.

ScreeningWorks

PRO

Welcome Timbercreek East Townhomes (P3587)

[Find Applicant](#)

[Corporate Applications](#)

[Help](#)

[Logout](#)

Property Screening Result

APPLICATION RESULT: ACCEPT - BASE DEPOSIT

[Print Application](#)

[Refresh](#)

[View Guarantors](#)

Active Group Members

APPLICANT	SSN	RESULT	REASON	ITEMS TO REVIEW	DATE	LETTER
Cody Lenheart-Abbott	X-0407	ACCEPT	No Credit Experience	No	12/03/2018 10:09 AM	N/A
Stefanie Needles	X-0520	ACCEPT	No Credit Experience	No	12/03/2018 10:09 AM	N/A
Jaden M Hall	X-9663	ACCEPT	No Credit Experience	No	12/03/2018 10:09 AM	N/A

Additional Application Info

TOTAL INCOME: \$4900 per month

PROPOSED RENT: \$980

RENT/INCOME: 20%

SITE CODE: [\(update site code\)](#)

MARKET SOURCE:

Processing Information

DATE ENTERED: 12/03/2018 02:24 AM

LAST MODIFIED: 12/03/2018 10:09 AM

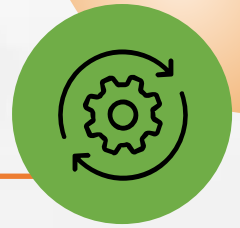
INPUT BY: cgriffin

POLICY: FIRSP01

REPORT ID: 34036027

CRM IQ

Screening Process



Click on each tab to view additional information regarding the applicant and the screening result.

Property Screening Result

APPLICATION RESULT: ACCEPT - BASE DEPOSIT

[Print](#) [Generate Letters](#) [Refresh](#)

Applicant Information

NAME: Cody Lenheart-Abbott
SSN: xxx-xx-0407
DOB:
CURRENT ADDRESS: 40003 e 209th ST, Kingsville, MO 64061

Additional Applicant Information

Residence History

This applicant has rented or owned.
TIME AT CURRENT ADDRESS: 13 years 4 months

Employment/Income

PRIMARY INCOME: \$1700 per month
PROPOSED RENT: \$980
RENT/INCOME: 20%
TIME AT CURRENT JOB: 2 years 7 months
TIME AT PREVIOUS JOB: 6 months

Additional Income:

- Additional Applicant: \$3200 per month

Individual Result

Accept - Base Deposit

Additional Information

Reasons for Result

- No Credit Experience

[Overview](#) [Credit](#) [Criminal](#) [Civil Court](#) [Rental](#) [OFAC/SDN](#)

[Overview](#) [Credit](#) [Criminal](#) [Civil Court](#) [Rental](#) [OFAC/SDN](#)

EXPERIAN CREDIT REPORT

Personal Information

Name: TERRY L JOON
Also Known As: TERRY L JOON
Date of Birth: 01/01/1980

Primary Address	Other Addresses
Address: 40003 E 209TH ST BLUE SPRINGS MO 64014-6610 Filed: 10/24/2016	Address: 40003 E 209TH ST BLUE SPRINGS MO 64015-2613 Filed: 07/16/2014 Address: 7701 GUNSP AV RAYTOWN MO 64138-2465 Filed: 07/27/2014

Checkpoint Messages

0084 SSN MATCHES
SSN issued between 1976 and 1978

NOTE : It is important to click on the **Credit** button to look at the **Checkpoint Messages** to ensure the Social Security Number Matches. If it does not match, have the applicant provide a copy of their Social Security Card and ensure it was entered correctly.

Application Policy

01

Pending Applications | Pending applications are considered applications that have not been sent to Ruanne for review or are waiting on additional documents to be able to send for review.

- a. Valid for 30 days from the date of application.
- b. Can only hold a unit for 72 hours then must be moved to Waitlist for up to 30 days from application date.
- c. They will be cancelled or denied based on the initial screening decision on the 31st day if they cannot be sent for review and approval.
- d. After 30 days if applicant is cancelled, a new guest card must be created, and they must fill out a new application and sign new rental qualifications and applicant will be required to pay all fees to apply again.

02

Site's Responsibility for Reviewing Pending Applications

- e. All required documents and information needed to approve or deny the application(s) must be uploaded to the applicant's attachments.
- f. Site will initially review screening results.
 - i. Review all checkpoint messages.
 - 1. If SSN does not match, must obtain copy of Social Security card.
 - 2. If applicant entered the wrong SSN, they are responsible for paying for another screening to be ran.
 - ii. Review credit, criminal, civil, utility
 - 1. If criminal comes back, send to Jane/Ruanne to review.
 - 2. If landlord or utility debt, contact applicant and advise they have 72 hours to provide proof of payment. Landlord debt must be paid off 24 months prior to application.
- g. Review Income to Market Rent
 - i. Confirm pay stubs and amounts entered are accurate and contact applicant if additional pay stubs or income statements are needed.
 - ii. If screening comes back as guarantor needed, contact the applicant to discuss the option for guarantor or additional roommate.
 - 1. If applicant cannot find or does not want to use a guarantor or roommate, they will be cancelled.
 - iii. Site will contact the applicant for any additional information needed (Ex. Proof of paid judgement, utility, etc.)
- h. Once all information and documents have been obtained, will send to be reviewed.
 - i. If on waitlist, will receive a contingent approval based on all information received and final approval once unit is selected to verify income requirement.

03

Documents Required | All required documents must be received and verified within 72 hours of application to be sent for review.

- i. If required documents are not received within 72 hours of application date
 - i. Move applicant to waitlist for up to 30 days from application date.
 - ii. Advise applicant they are no longer holding an apartment and they must provide all required documents or will be cancelled/denied on the 31st day.
- j. If documents are received after 72 hours but before 30 days (able to be reviewed and approved within 30 days)
 - i. No additional fees are required for application/admin fees.
 - ii. Once applicant has provided all documents, move applicant to unit available and submit all items for review.
 - iii. If original unit is not available, applicant will be responsible for choosing another available unit that meets their preferences and max rent amount income approved for and will be charged all applicable market rent and fees as of the date they choose the new unit.
 - iv. If no unit is available, they will remain on the waitlist as a contingent approved applicant for up to 90 days.
 - v. No specials or discounts will be given for the new unit if they are no longer being offered.
- k. If documents are not received within 30 days of application
 - i. Applicant will be cancelled or denied on the 31st day based on the screening decision.
 - ii. Applicant will be required to create a new guest card, sign new rental qualifications, fill out a new application and pay all fees to apply again.

Application Policy

04

Approved Application | Applications that have been fully reviewed and meet all qualifications and criteria and have been approved in Yardi.

- a. Valid for 90 days from the date of application
- b. Applicant must move in within 90 days from date of application.
 - i. If move-in date is more than 60 days from application date, applicant must provide current proof of income on the 60th day and we will re-screen for criminal and civil records at no charge to applicant.
 - ii. Applicants who do not move in within 90 days from application date will be cancelled on the 91st day (excluding Regional approval for extenuating circumstance).
- c. Earnest Money / Holding fees must be paid in full.
 - i. If Earnest Money / Holding fee fails, applicant has 24 hours to make payment.
 - ii. If payment is not made within 24 hours, move applicant to Waitlist.
 - iii. If payment is not made within 30 days from date of application, applicant will be cancelled on the 31st day
 - iv. Applicant will be required to create a new guest card to sign new rental qualifications, complete a new application and pay all application fees to apply again.

05

Contingent Approved Application | Applications on the waitlist that have been reviewed and meet all qualifications and criteria including income up to a max rent amount but will need to have income reviewed again for full approval once a unit has been selected.

- d. Reviewer will add notes to the Approval Details section in Yardi indicating Contingent approval and the max amount of rent their income qualifies for.
- e. Valid for 90 days from the date of application
- f. Once a unit is selected, income will be reviewed, and a full approval will be entered in Yardi if they qualify
- g. Applicant(s) must move in within 90 days from the date of application
 - i. If move-in date is less than 60 days from the date of application and they are moved to a unit, will review income and if qualified enter full approval in Yardi
 - ii. If unit selected is less than 60 days from the date of application but the move in date but the move-in date is more than 60 days from application date, applicant must provide current proof of income and we will re-screen for criminal and civil records on the 60th day at no charge to applicant
 - iii. If a unit is selected more than 60 days from application date, the applicant must provide current proof of income and we will re-screen for criminal and civil records at no charge to the applicant
- g. Applicants who do not move in within 90 days from application date will be cancelled on the 91st day (excluding Regional approval)

06

Denied Application |

- a. Applications will be denied for the reasons listed under Section 4 and 6 of the Rental Qualifications
- b. The Deny button in Yardi will ONLY be used when the decision from ScreeningWorks comes back as Denied and applicant does not provide additional information that can be used to re-evaluate the application for qualification
- c. All applicants that were screened together will all be considered denied even if they qualify on their own separately
- d. Applications denied must fulfill the waiting period before applying again
 - ii. Criminal denials will be required to wait 180 days from the date of the original application submission to apply again
 - iii. All other denials will be required to wait 30 days from the date of the original application submission to apply again

Application Policy

07

Cancelled Application

- a. The Cancel button in Yardi will be used for the following reasons:
 - i. Decision from ScreeningWorks comes back as Accepted but the applicant cannot provide the required documents such as Income verification, paystubs, photo ID, Social Security Card, etc. to be submitted for review and approved within 30 days of date of application
 - ii. Decision from ScreeningWorks comes back as Conditional but the applicant cannot meet the additional conditions such as guarantor, additional deposit, or high-risk fee.
 - iii. Approved or Contingent Approved applicant does not move in within the required time frame of 90 days from application date (excluding Regional approval).
 - iv. Applicant asks to cancel their application

08

Re-apply Application

- b. The Re-apply button in Yardi will ONLY be used to re-apply a cancelled application:
 - i. That applied less than 30 days ago; AND
 - ii. All applicants remain the exact same; AND
 - iii. Applicant provides all required items/documents necessary to submit for review AND approval or contingent approval can be issued prior to the expiration of the 30-day window for pending applications
- d. Cancelled applicants that applied more than 30 days ago:
 - i. Must create a new guest card – DO NOT use the re-apply button or merge guests
 - ii. Must sign new rental qualifications
 - iii. Must fill out a new application form and submit updated documentation
 - iv. Must pay all application/admin/holding fees again

Application Process Breakdown

FIRST PACIFIC
FIRST PACIFIC GROUP, INC.



Application Policy

Prior to submitting an application for approval, please be sure to thoroughly check each item below to ensure they meet our criteria, have submitted all required documentation and are ready to be reviewed for approval.



Income

- Gross Income must be verifiable

Last 2 pay stubs preferred. If OT (overtime) is being used to qualify need last 4 paystubs.

- If not, 2 months bank statements and written employment verification.

Cash Income must be verifiable via employer **and** consistent bank deposits; otherwise, cash is not accepted.

- Trust/401ks

Proof of disbursement must be submitted via 2 months bank statements

Broker/Financial Advisor to outline disbursement stipulations

For 401k's, age of maturity is 63.5. Ex: If a 40-year-old had \$200,000 in a 401k it's irrelevant.



Employment

- School

Non-tuition grants/stipends award letters acceptable. Expense of school is deducted from total.

- Offer letters acceptable, however must be signed by both employer and employee. *Must be a non-contingent signed letter.* If contingencies exist an employment verification must be completed.

- Retirement

Bank statement with 2 months identical deposit amounts; or Social Security Statement and proof of any retirement benefits



Credit

- We cannot give out credit reports; prospects must request these from Screening Works. *California Properties will be auto-sent when screening is processed per California ICRAA Law*



Identity

- Only these documents will suffice in lieu of a SS #. Make sure to toggle NO SS # when the applicant is applying if they do not have a SS #
 - Citizenship Card, Consulate Cards
 - INS Form I-864 Sponsorship Verification
 - Certificate of Naturalization (INS I-550)
 - U.S. Passport
 - Certificate of U.S. Citizenship (N-550 or N-561)
 - Unexpired Foreign Passport, with 1-555 Stamp or INS Form 1-94 Indicating Unexpired Employment Authorization
 - Alien Registration Receipt Card with Photograph (I-151 or I-551)
 - Unexpired Reentry Permit (I-327)
 - Unexpired Refugee Travel Document (I-571)
 - U. S. Driver's License or ID Card
 - Military Card or Draft Record or Military Dependent Card

Application Policy



Residency/Rental History

Receipt of past due amounts from prior Landlords or a satisfaction of judgement. Rental verification of no balance owed. Must be paid 24 months prior to application.



Criminal

In the event of a criminal history, Jane must review the report first. Jane/Ruanne will instruct if it is a denial or if more information is required.



Occupancy

Differentiate between familial status vs. occupancy in the event of pregnancy. We only comment on how many occupants there currently are. Once residents in a unit exceed occupancy limits, they have 90 days to transfer to a unit that allows the current number of occupants.



Security Deposit

Paid at the time of application. If an additional deposit is needed it is paid at or prior to move-in. This is not the same for all sites. Some sites require the admin fee and app fee be paid to secure an apartment while others require the deposit. Please check with your Manager for specifics regarding your site.



Animal Deposit

Must be paid before the animal is on property. Must have a signed animal addendum (or reasonable accommodation form for service/ companion animal.)



Parking

We would like vehicle info from all applicants. Most sites have 1st come , 1st serve parking, but others have reserved spaces. Please check with your Manager for specifics regarding your site.

HUD/Section 8:

We lease to anyone that meets our criteria. Make sure you stay consistent and following county and HUD housing discrimination guidance and regulations. You are responsible for making sure you lease to all applicants that qualify and not indicating otherwise putting yourself and First pacific at risk of large fines.

Service Animals/Companion Animals

- SA = CA (law subject to change)
- We cannot reject a doctor's letter.
- If there is an apparent disability, we cannot ask the prospect to fill out a form.
- We must have the Reasonable Accommodation form filled out prior to the animal on the property.
- The form must be faxed or emailed to the medical provider and then returned via fax or email

Application Submission/CRM :

- Review income prior to submitting for review. Ensure screening is completed with correct income/SSN. Do not use "Requalification" tab.
- When updating income, toggle edit and click select under the active applicant.
- When updating SSN, do NOT toggle edit and click select under the active applicant.
- If unsure documentation is acceptable, you can email Regional/Ruanne/Jane for review prior to the commencement of the application.

Denied and Falsified Applications



New Policy

- In the event an applicant is denied due to false information that they provided on the application; they will forfeit their deposit. This new section is on the front of the application and requires them to initial this spot (please note the amount listed in this section is property specific.)

GENERAL QUESTIONS: (Circle Yes or No) The Applicant certifies that all the information provided on the lease application is true and accurate and that no significant omissions of important information that would likely lead to a rejection were made. Applicant further certifies and agrees that if his/her/their application is denied because the Applicant provided false or inaccurate information, then the Landlord shall be allowed to deduct and keep from Applicant's deposit, the sum of \$150 as an application processing fee and/or as damages.		Please Initial:	
Have you ever been charged with misuse or abuse to any rental property or do you owe a current or previous balance to a landlord or mortgage company?		Yes	No
Have you ever been evicted from a place of rental?		Yes	No
Have you ever been sued for nonpayment of rent or damaged rental property?		Yes	No
Have you ever been convicted or have pending charges of a felony offense or misdemeanor crime against persons and/or property or involving controlled substances or deadly weapons?		Yes	No
Have you ever declared bankruptcy? (If Yes See Below)		Yes	No
Year:	County Where Filed:	State/Province Where Filed:	

- There is also a notation under section 6 of the criteria for Denial of Application.

d. Falsification of any information on the rental application. Falsification on the rental application will result in forfeiture of deposit.

- Send denied Applicants/Co-signers a Denial Letter generated in ScreeningWorks and be sure a copy is saved with their file.

Submitting Application for review



After verifying all information, you will be ready to submit the application over to Ruanne for review. Double check that everything is in place before sending it and fill out the template below. You'll send it directly to her email rdeaguero@fpacific.com with your site email address cc'd.

Unit:

Applicants:

POI uploaded:

3x's rent:

Income:

Screening works recommendation:

Any credit discrepancies:

Did Criminal have prior approval?

Any other info needed to make decision:

Submitting Application for review



Saving Documents Applicants and Residents

All Documents need to be saved as: Property Code – First initial of First name – Last name – Apt # - Document Type – Date

(TE A. Cates 1764 Picture ID 12-6-24)

Make sure to always select the type so it is to find the documents.

To edit this on the documents go to Documents → Attachments → Click the Pencil Icon → Edit the document Name → Edit the Document Type → Click Save.

See examples below

Adison Cates (Applicant) Timbercreek East Townhomes • Unit 1764 • p0439753 Leasing Agent Christina Griffin

Document Tracking

Signature Documents Upload Documents **Attachments**

Select who this attachment is for*

Adison Cates

Drop files here to upload.

or

Select File

Max Size: 5MB, Valid files: PDF, Text (TXT, CSV, XML), Excel (XLS, XLSX, XLSSB), Word (DOC, DOCX, RTF), Image (JPG, JPEG, TIF, BMP, GIF, PNG), Video (MP4, MPG, AVI), Other (ZIP, DWF, DWFX, SVG)

Uploaded Files 10

Prospect	Name	Type	Uploaded Date	Portal	Edit	Download	Delete
Adison Cates	TE A. Cates - D. Brannan 1764 Application Screening 12-5-24.pdf	EMAIL ATTACHMENT	Dec 6, 2024				
Adison Cates	TE D. Brannan 1764 Income (2) 12-4-24.jpg	Proof of Income	Dec 6, 2024				
Adison Cates	TE D. Brannan 1764 Income (1) 11-20-24.jpg	Proof of Income	Dec 6, 2024				



Submitting Application for review

The subject will say Property Code □ Last Name(s)□ Apartment number□ M/I Date of Move-in. If the move-in is within 72hrs put URGENT in the subject line as well.
Ex: SS Riley 2601 M/I 12-30-24.

Your email will then look like this.

Hi Ruanne,

Unit: 2304

Applicants: Yousef Alghareed

POI uploaded: Yes

3x's rent: \$2,367

Income: \$6,366

Screening works recommendation: Accept - Base Deposit

Any credit discrepancies: No

Did Criminal have prior approval? No Criminal

Any other info needed to make decision:

Property Screening Result

APPLICATION RESULT: ACCEPT - BASE DEPOSIT

[Print Application](#)

[Refresh](#)

[View Guarantors](#)

Active Group Members

APPLICANT	SSN	RESULT	REASON	ITEMS TO REVIEW	CHECKPOINT MESSAGES	OFAC HITS	DATE	LETTER
Yousef W Alghareeb	NO SSN	ACCEPT	No Credit Experience	No	Yes	No	05/13/2022 02:15 PM	N/A

Approval of Application

After Ruanne has approved your application, she will automatically charge the applicant the standard earnest deposit. This earnest deposit is **non-refundable**.

She will send you an email with all approve notes and you'll get an additional email informing you if the earnest deposit has successfully processed through.

If the earnest deposit fails, the applicant has 24hrs to login and pay or they will be moved to the waitlist and that home is now back on the market.

Ruanne will also put her approve notes in the applicants Memos

Once approved your applicant will move from Needs Screening/Evaluation to Generate Lease

The screenshot shows the CRM IQ interface for an applicant named Shadon Mandley. The interface is divided into several sections: Overview, Customer Information, Application Status, and Space Details. The Application Status section shows the application is 'Approved' with a status of 'Approved' and a date of 'Nov 22, 2024'. The Space Details section shows the property is 'Cedar Ridge Apartment Homes (r) - WAIT2' and the unit is '2-bedroom (938 sq ft)'. A red box highlights the 'Activities' tab on the right side of the interface.

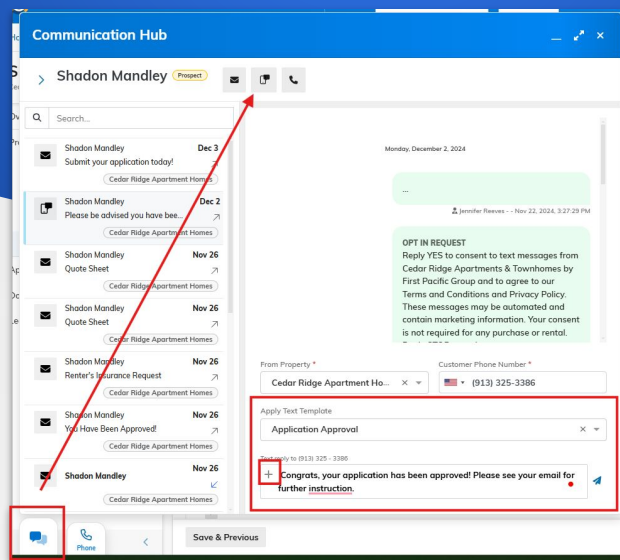
The screenshot shows the 'Activities' window in the CRM IQ interface. The window displays a list of activities for the applicant Shadon Mandley. The activities include 'Move-In', 'Lease Exec', 'App Approved', 'App Submit', 'Show Complete', 'Tour Sched', and 'First Contact'. A red box highlights the 'Memo' activity, which is dated 'Nov 26, 2024, 10:17 AM CST' and was created by 'Ruanne Deaguro'. The description of the memo is 'Approved with a full month deposit. RD'. A red arrow points from the 'Memo' activity in the list to the 'Memo' activity in the details pane on the right.

The screenshot shows the 'Agent Dashboard' in the CRM IQ interface. The dashboard displays a 'Daily Completion Score' of 78% and a 'Priority' list of 24 items. The 'Priority' list includes 'Application in Progress' (97), 'Needs Screening/Evaluation' (2), 'Generate Lease' (4), 'Lease Sent' (1), 'Countersign Lease' (0), and 'Needs Move In' (0). A red box highlights the 'Generate Lease' item in the priority list. Below the priority list, there is a table showing the status of various applications. The table has columns for 'Person', 'Property', 'Roommates', 'Dates', 'Lease Status', and 'Next Step'. The 'Person' column lists four applicants: Shadon Mandley, Brian Markley, Mark Slaughter Jr, and Anny Eads. The 'Property' column lists three properties: Cedar Ridge Apartment Homes, Cedar Ridge Apartment Homes, and Cedar Brooke Apartments. The 'Dates' column shows the application dates and the dates for the move-in. The 'Lease Status' column shows the status of the lease, and the 'Next Step' column shows the next action to be taken. A red box highlights the 'Generate Lease' button in the 'Next Step' column for Shadon Mandley.

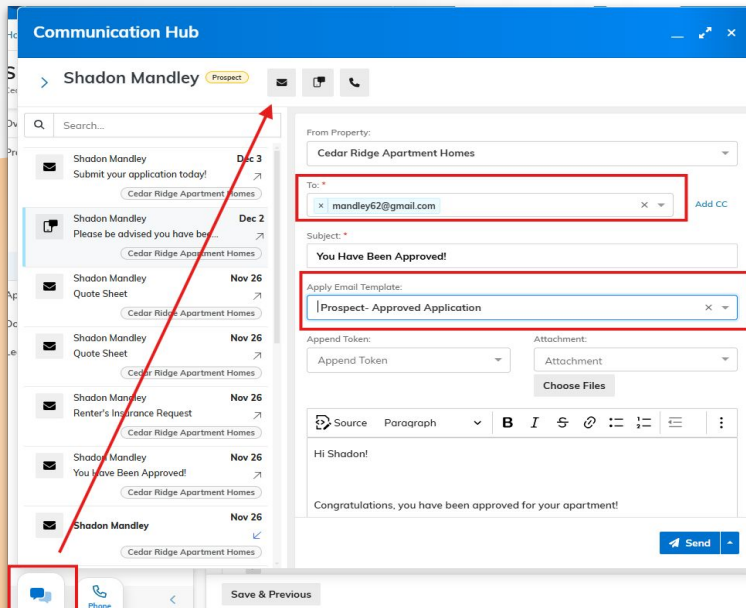
Approval of Application

After the earnest has processed through you will now be able to send the applicant all the approval templates.

First, you'll send the text template. By clicking the applicant under Generate Lease or Searching → Open Com-Hub → Click the Text Icon → Click the + sign → Select the approval template → Wait a few seconds for it to populate → Send. □



You'll then go to email and send the Prospect- Approved Application Template. Click the com-hub → Email icon → Select the recipient → Click the template drop down → Search or type the template → Wait a few seconds → Preview to make sure no info is needed from you → Send.



Approval of Application

A series of follow ups and templates have also been created to better our communication with applicants after they are approved until their move-in day.

Follow ups will show up in your Complete Follow-up Queue Box noting whether the action is a call or email. Below are the new templates created for the email follow ups.

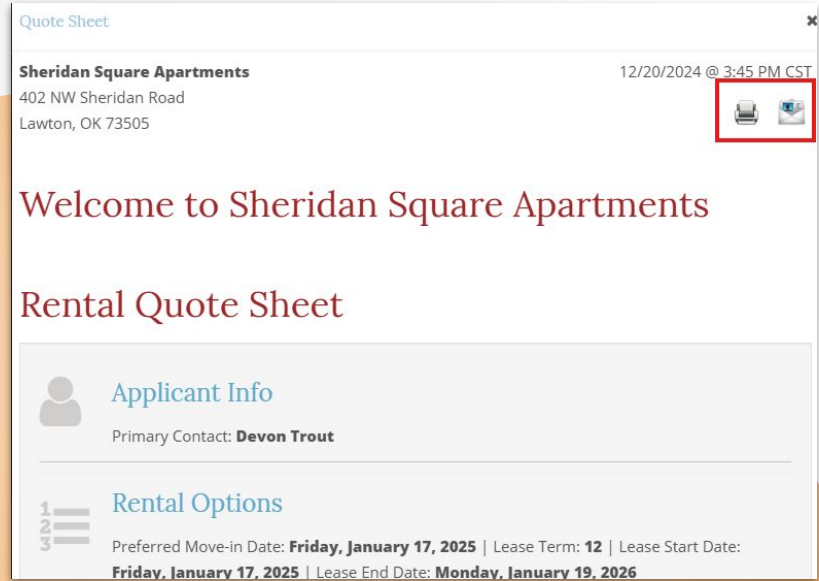
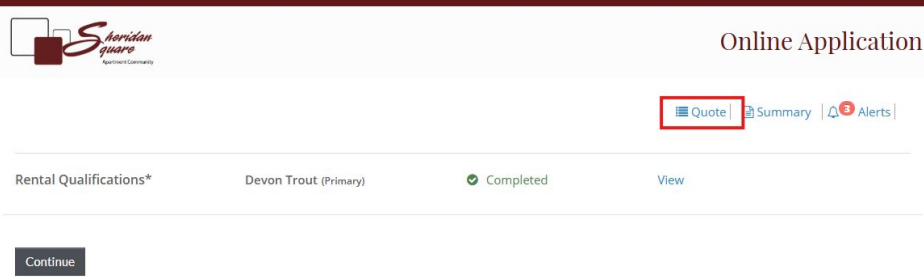
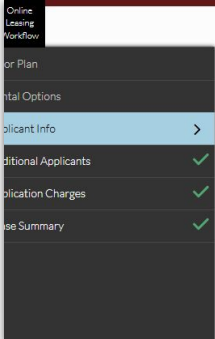
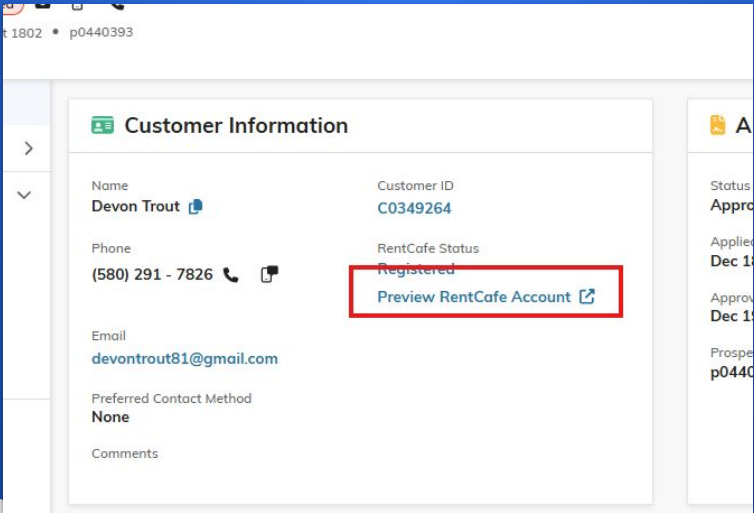
The screenshot displays the 'Communication Hub' interface for 'Samantha Dixon' at 'Cedar Brooke Apartments'. On the left, a list of communication items is shown, including several emails from 'Samantha Dixon' dated Dec 5, Dec 4, Dec 1, Nov 18, and Nov 14. The main panel on the right shows an email composition form. The 'From Property' field is set to 'Cedar Brooke Apartments'. The 'To' field contains the email address 'sjd88820@gmail.com'. The 'Subject' field is empty. Below the subject field, there is a section titled 'Apply Email Template:' with a dropdown menu set to '1 wee'. A red box highlights two template options: 'Applicant- 1 week after approval' and 'Applicant- 1 week prior to move-in'. Below this, there are two more options: 'Voyager' and 'Voy_1 week after approval', and 'Voy_1 week prior to move-in'. A 'Send' button is visible at the bottom right of the form.

Note: If the applicant is scheduled to move-in asap or within 1 week some follow ups will automatically deactivate themselves.

Quote Sheets

After the applicant is approved a quote sheet should be sent letting the applicant know the amount owed on move-in day.

To send this navigate to the applicants account → Click Preview RentCafe Account → Once the portal opens click Quote → You then can print, download, or email it to them.

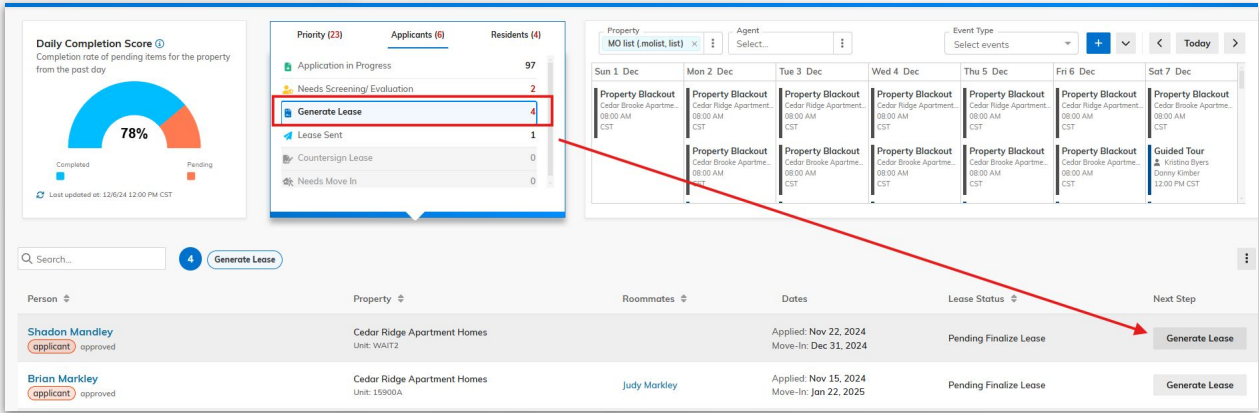


CRM IQ

Lease Generation

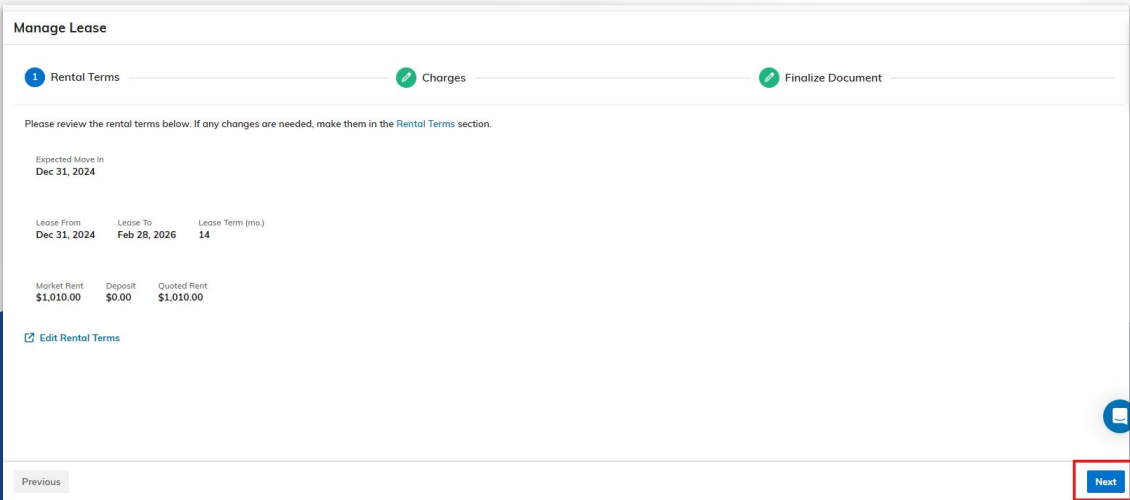


- Once the application has been approved, you will need to generate their lease for them to e-sign. Leasing Specialists do not generate new leases only renewal leases. Note: This may vary by Region. Regional Managers will determine who will generate new leases and renewal leases.
- All lease and move-in information needs to be sent ahead of move-in for the new resident to review.
- For all new move-ins, all new leasing documents should be uploaded into CRM IQ. This should include: all application materials, leases, renters insurance, copies of IDs, Signed Rental Qualifications and employer and rental verifications.
- You can scan documents to yourself and save to your desktop but they must be deleted immediately afterwards. **NOTHING should be on your desktop.** Name the file with the property code, First initial of first name, Resident Last Name, unit number, document name, and the date. Example: CR J. Johnson-15780 Lease 12-6-24.
- See paperless procedure for instructions to upload attachments to CRM IQ.



The screenshot shows the CRM IQ dashboard. On the left, there's a 'Daily Completion Score' gauge at 78%. In the center, a table lists tasks for 'Applicants (6)' and 'Residents (4)'. The 'Generate Lease' task is highlighted with a red box and a red arrow pointing to the 'Generate Lease' button in the 'Next Step' column of the table below. The table lists two applicants: Shadon Mandley and Brian Markley, both with 'Pending Finalize Lease' status.

By clicking Generate Lease this will bring you to the manage lease options. You'll review the Rental Terms and then click next. You may make edits if needed.



The screenshot shows the 'Manage Lease' screen. It has three tabs: 'Rental Terms', 'Charges', and 'Finalize Document'. The 'Rental Terms' tab is active. It displays the 'Expected Move In' date as 'Dec 31, 2024'. Below this, it shows the 'Lease From' date as 'Dec 31, 2024', the 'Lease To' date as 'Feb 28, 2026', and the 'Lease Term (mo)' as '14'. It also shows the 'Market Rent' as '\$1,010.00', the 'Deposit' as '\$0.00', and the 'Quoted Rent' as '\$1,010.00'. There is an 'Edit Rental Terms' link. At the bottom right, there is a 'Next' button highlighted with a red box.

CRM IQ

Lease Generation



The next step is to review the move-in and monthly charges. If correct click next or if incorrect click edit charges.

Rental Terms

2 Charges

Finalize Document

Please review the charges below. If any changes are needed, click Edit Charges.

Edit Charges

Move In

Charge Code	Description	One-Time Charge
util	Next Month's Utilities	\$60.00
rent	Rent for 4 days	\$32.58
amendep	Amenity Deposit	\$25.00
move-in	One-Time Move-In Concession	-\$1,180.00
adddepos	Additional Deposit	\$980.00
util	Utilities for 4 days	\$8.00
rent	Next Month's Rent	\$1,180.00

Total \$1,105.58

Monthly

Previous

Next

Finally you'll come to the Finalize Document section where all charges, dates, emergency contacts, etc must be reviewed thoroughly. Once completed click Finalize Lease.

Rental Terms

Charges

3 Finalize Document

Click Finalize Lease to send a signature request to the customer via email and to make it available in the RentCafe online app.

Finalize Lease

3e8a02a2-e68a-4035-9b84-7408fd633300

1 / 49100%

1

employees:

a. AGENT FOR LANDLORD: **First Pacific Group** whose address is **Cedar Ridge Apartment Homes, 3100 Quail Creek Drive, Independence, MO 64055** is authorized to manage the premises. LANDLORD or agent for service of process and receiving notices is **First Pacific Group** whose address is **Cedar Ridge Apartment Homes, 3100 Quail Creek Drive, Independence, MO 64055** and phone number is **(816) 373-8500**

It is agreed that the LANDLORD may designate another agent from time-to-time by delivering notice of such change to TENANT or by mailing notice to TENANT at the leased premises via U.S. first class mail, postage prepaid.

2. **OCCUPANTS.** Only the designated TENANT(S) and the following persons shall occupy the premises:
Shadon Mandley

Anyone who is not named in this paragraph, or who does not sign this lease, may not reside on the premises. Anyone not listed above must not stay on the premises for more than 10 consecutive days without the LANDLORD'S prior written consent and not more than 10 days in any one month. All persons who wish to reside on the premises must be named in this paragraph, be submitted to our screening and application process and, if over age 18, sign this lease.

If any adults occupy the premises other than those listed herein, the LANDLORD shall have the option of pursuing any remedies allowed by law, including terminating the lease.

The provisions of this paragraph do not apply to the TENANT'S minor children except that the total number of persons occupying the premises shall not exceed the allowable amount by law. Upon request by the Landlord, the Tenant shall provide satisfactory proof of their familial relationship to other occupants of the premises or the address of any person

Previous

Next

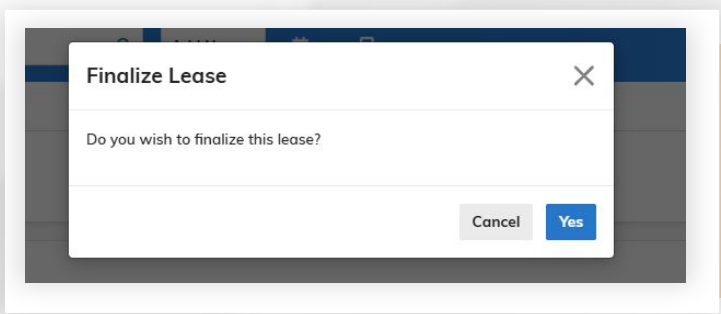


CRM IQ

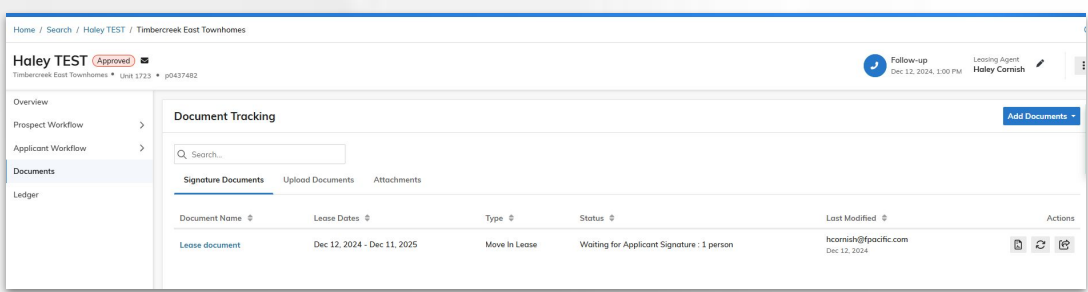
Lease Generation



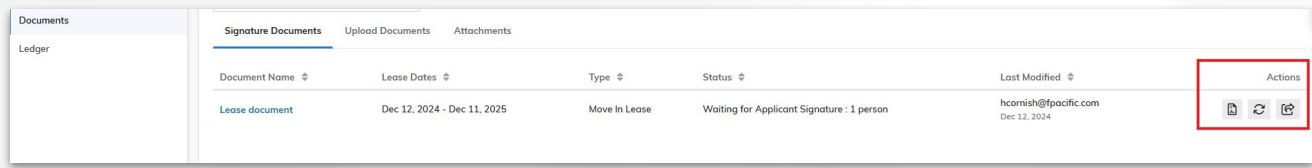
A **Pop-Up Window** will come up asking if you are sure you want to Finalize and generate the lease. Click **Yes**.



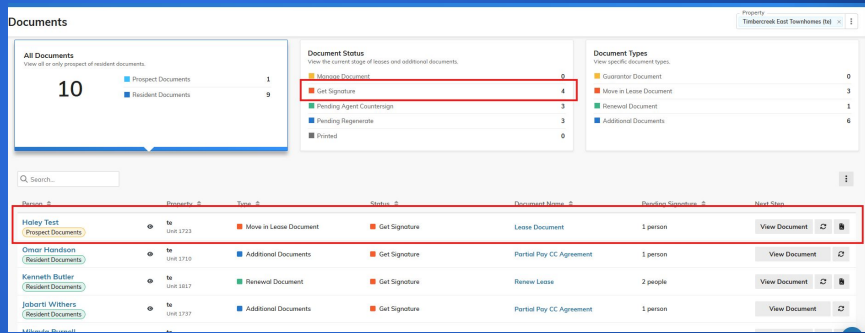
This will send the applicant an email letting them know the lease is ready to be signed. You can view the **Lease Document** by going to the **Documents Dashboard** or **Documents** in the applicants account.



With the copy of the document you have additional options if they apply. You can regenerate the lease, Resend for signature, or mark it as manually signed **permission required**



In the documents Dashboard it will tell you if / when the applicant has countersigned or if a roommates signature is missing.



CRM IQ

Lease Execution



Once the resident has finished signing the document, the site team will receive an email that it is pending counter sign. The document will move to the **Pending Agent Countersign** tab of the Documents Dashboard. Once ready for countersign there is a Sign all button that will sign all pages for you.

Documents

Property: MO list (molist, list)

All Documents
View all or only prospect of resident documents.

108

- Prospect Documents: 15
- Resident Documents: 93

Document Status
View the current stage of leases and additional documents.

- Manage Document: 4
- Get Signature: 81
- Pending Agent Countersign: 0**
- Pending Regenerate: 23
- Printed: 0

Document Types
View specific document types.

- Guarantor Document: 0
- Move in Lease Document: 25
- Renewal Document: 7
- Additional Documents: 76

From the **Documents Dashboard**, you will find **Documents that Need to be managed, get signature (residents), Pending Agent countersign, and Pending Regenerate**. From which ever tab you select a list of resident will appear the bottom with the Type, Status, Document name, Pending Signature, and Next step.

Documents

Property: MO list (molist, list)

All Documents
View all or only prospect of resident documents.

108

- Prospect Documents: 15
- Resident Documents: 93

Document Status
View the current stage of leases and additional documents.

- Manage Document: 4
- Get Signature: 81
- Pending Agent Countersign: 0
- Pending Regenerate: 23
- Printed: 0

Document Types
View specific document types.

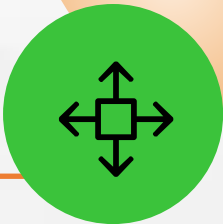
- Guarantor Document: 0
- Move in Lease Document: 25
- Renewal Document: 7
- Additional Documents: 76

Search...

Person	Property	Type	Status	Document Name	Pending Signature	Next Step
Francis Cox LII (Resident Documents)	te Unit 1721	Renewal Document	Get Signature	Renew Lease	2 people	View Document
Shanna Walsworth (Prospect Documents)	cr Unit 4600A	Additional Documents	Get Signature	Rental Qualifications	1 person	View Document
Delicia Jones (Prospect Documents)	cr Unit 15508C	Additional Documents	Get Signature	Rental Qualifications	1 person	View Document
Aniya Harris (Prospect Documents)	cr Unit 4600D	Additional Documents	Get Signature	Rental Qualifications	1 person	View Document
Matthew Armstrong (Resident Documents)	te Unit 1745	Additional Documents	Get Signature	Roommate Rider	2 people	View Document

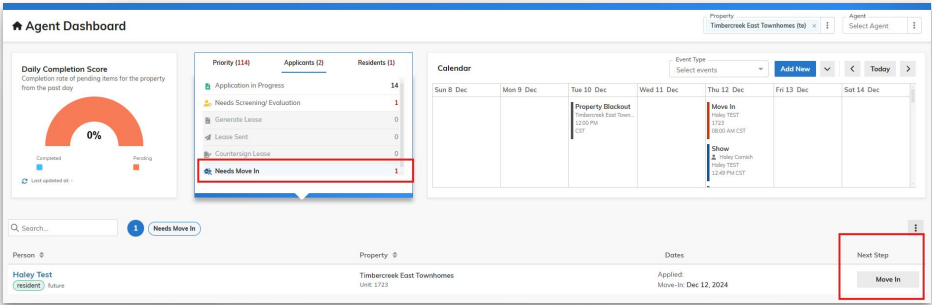
CRM IQ

Move In



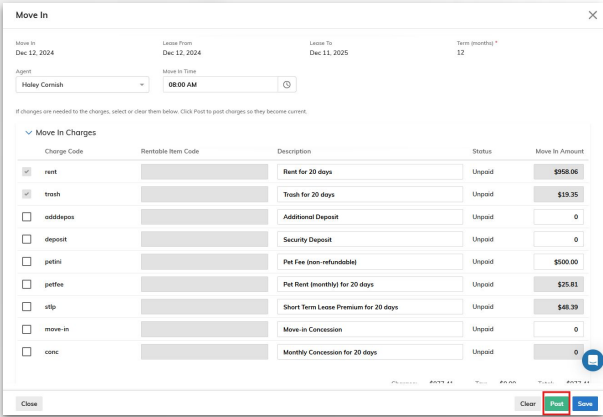
Once the resident has an executed lease, all move in funds are paid and keys are issues, you will need to move them into the system by following the following steps.

01 | From the Applicant Box go to Needs Move-in. The move-in will show below with the Move In button.



The screenshot shows the 'Agent Dashboard' for 'Timbercreek East Townhomes'. On the left, there's a 'Daily Completion Score' gauge at 0%. In the center, a 'Priority (114)' list shows 'Needs Move In' with a count of 1, highlighted with a red box. To the right is a 'Calendar' view. At the bottom, a 'Next Step' button is highlighted with a red box.

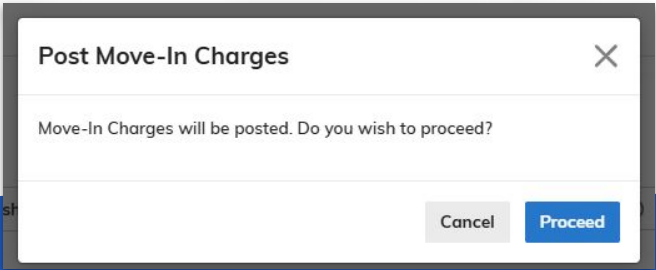
02 | Verify the **Move In Date**, **Lease From** Date and **Lease To** date are correct and match the lease. Then click Post.



The 'Move In' form shows the following details: Move In Date: Dec 12, 2024; Lease From: Dec 12, 2024; Lease To: Dec 11, 2025; Term (months): 12. The 'Move In Charges' table lists various fees:

Charge Code	Rentable Item Code	Description	Status	Move In Amount
☒ rent		Rent for 20 days	Unpaid	\$958.06
☒ trash		Trash for 20 days	Unpaid	\$19.35
☐ adddepos		Additional Deposit	Unpaid	0
☐ deposit		Security Deposit	Unpaid	0
☐ petini		Pet Fee (non-refundable)	Unpaid	\$500.00
☐ petfee		Pet Rent (monthly) for 20 days	Unpaid	\$25.81
☐ stp		Short Term Lease Premium for 20 days	Unpaid	\$48.39
☐ move-in		Move-In Concession	Unpaid	0
☐ conc		Monthly Concession for 20 days	Unpaid	0

03 | Once you click post a pop up will appear confirming that you are ready to post the charge. Click Proceed and the resident will now be current.

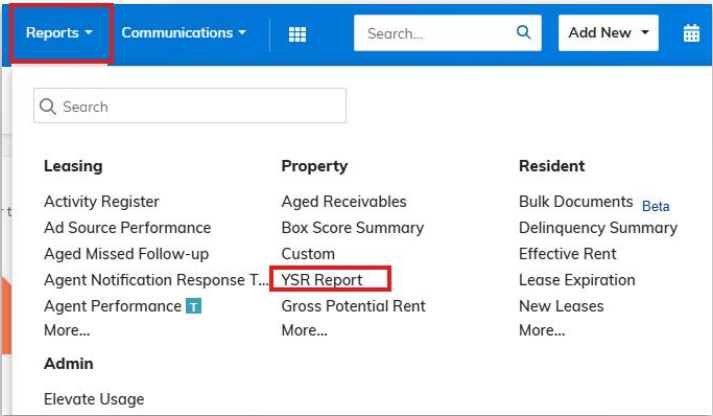


The dialog box titled 'Post Move-In Charges' asks: 'Move-In Charges will be posted. Do you wish to proceed?'. It has 'Cancel' and 'Proceed' buttons.

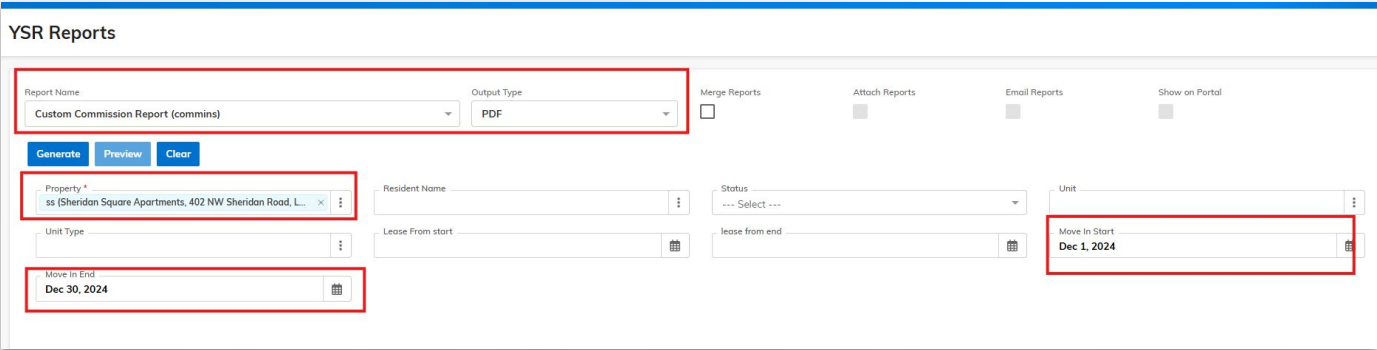
Commission Report

When it's time for process commission you'll need to pull the report and ensure all documents are uploaded. Documents include: ID(s), Pay statements, Move-in Pictures, Quote Sheet, Application checklist, and move-in checklist if returned.

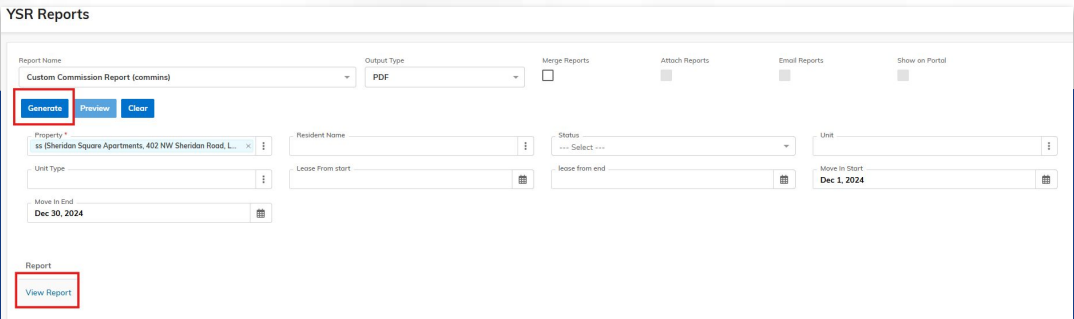
01 | To pull the report click Reports → YSR Report



02 | Under Report Name start typing Custom Commission. When it pulls up you'll select your site and enter move-ins dates from the 1st to the last day of the month.



03 | Once dates are entered click Generate → View Report. This will download the report in a PDF for you to review / print.

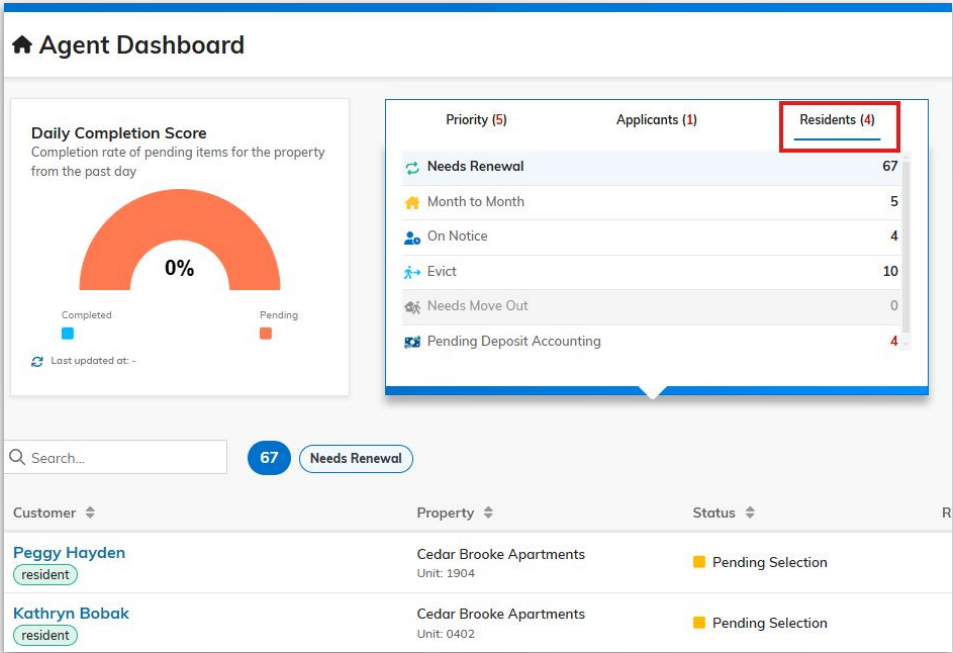


Renewal Lease Generation

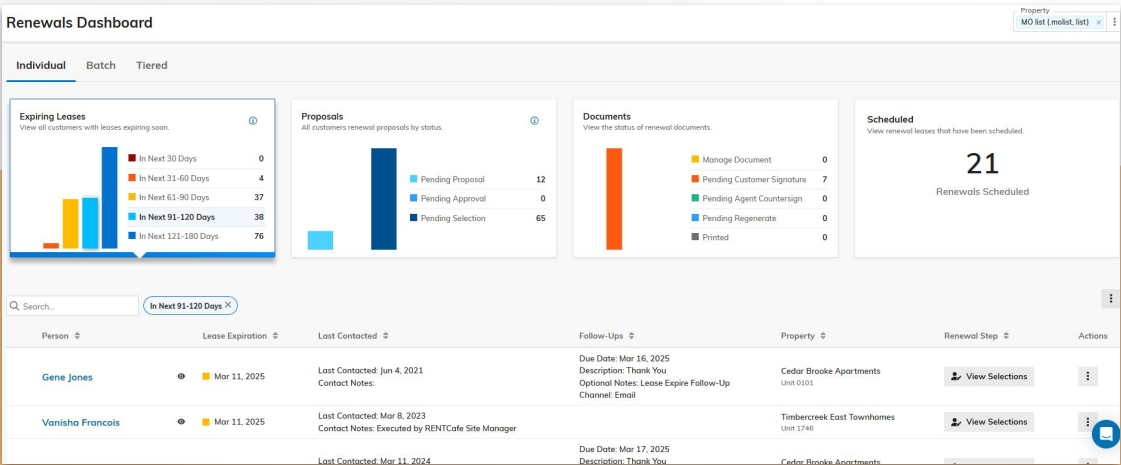


Each Resident will have multiple Renewal Proposals entered that they can choose from. Once the Resident chooses a renewal proposal from their Resident Portal, we can then generate the Lease Agreement for them to sign electronically.

You can view the status of each Expiring Resident’s renewal by in two spots. The Agent Dashboard in the Queue box under residents or the Renewal Dashboard.



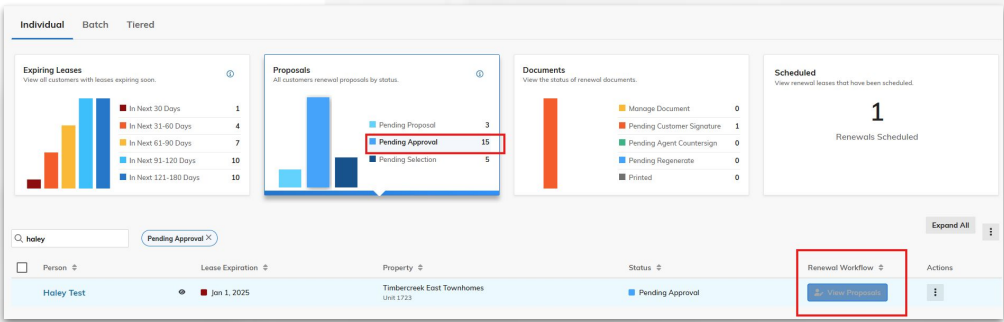
Under the Renewals Dashboard there are a range of things you can do. Review the graph on what’s happening between now - 180 days, Review the status of the proposals, Review status of documents, and see how many renewals are already scheduled.



Renewal Lease Generation



Once proposals are generated you can view them on the Renewal Dashboard → Pending Approval → Find your resident → View Proposals



Once you click view you can then approve or deny the proposal.

Person	Lease Expiration	Property	Status	Renewal Workflow	Actions
Haley Test	Jan 1, 2025	Timbercreek East Townhomes Unit 1723	Pending Approval	Close Proposals	

Batch Id	Proposal Date	Market Rent	Current Rent	Proposal Rent	Term	Lease Form	Lease To	Details	Available Actions
0	Dec 12, 2024	\$1,485.00	\$1,485.00	\$1,485.00	12 - 12	Jan 2, 2025	Jan 1, 2026		Approve Deny

Navigate back to the residents account to manage the renewal. Click General → Manage → Renewal Lease.

Haley TEST

Current Resident

Timbercreek East Townhomes (te) • Unit 1723 • 10088256

Overview

General

Profile

Manage

Lease Info

Ledger

Bank Accounts

Rentable Items

Manage

Search...

Date	Action	Notes	Agent	Details
Dec 12, 2024	Move In	Move In	Haley Cornish	

Renew Lease Manage

Once opened you can review the proposal , select, or deny it.

Lease Info									
Lease Details Lease Charges Lease Renewal Lease History Application Form Deposit Info Screening Other Info									
Create a renewal proposal by clicking "Add Proposal". After a renewal proposal is approved, a notification is sent automatically to the customer, making it available to be selected in their portal (an agent can also select a proposal here). Once one is selected, click "Manage Renewal" to complete the leasing steps.									
Add Proposal									
Hide Non-Active Proposals									
ID	Proposal Date	Rent	Term	Lease From	LeaseTo	Batch ID	Expiration Date	Status	Details
139459	Dec 12, 2024	\$1,485.00	12 - 12	Jan 2, 2025	Jan 1, 2026			Approved	
									Select Deny

Renewal Lease Generation



Once selected a pop up will appear to confirm you want to proceed with the proposal. Click Yes.

Confirmation

Do you wish to select this lease proposal?

NoYes

You then will be able to manage the document.

Lease Info										
Lease DetailsLease ChargesLease RenewalLease HistoryApplication FormDeposit InfoScreeningOther Info										
Create a renewal proposal by clicking "Add Proposal". After a renewal proposal is approved, a notification is sent automatically to the customer, making it available to be selected in their portal (an agent can also select a proposal here). Once one is selected, click "Manage Renewal" to complete the leasing steps.										
										☒ Hide Non-Active Proposals
ID	Proposal Date	Rent	Term	Lease From	Lease To	Batch ID	Expiration Date	Status	Details	Available Actions
139459	Dec 12, 2024	\$1,485.00	12 - 12	Jan 2, 2025	Jan 1, 2026			Selected	Manage Lease (Step 0)	QManageCancel

Review all steps very carefully ensuring all information is correct. Once at Finalize lease review the lease and click finalize.

Manage Lease

Lease InfoChargesFinalize Document

Click Finalize Lease to send a signature request to the customer via email and to make it available in the RentCafe online app.

Finalize Lease

1 / 41100%+[-]

Timbercreek East Townhomes

APARTMENT LEASE

This is a legally binding contract. Read carefully before signing. If not understood, seek competent legal advice.

1. PARTIES. This Agreement, made on this date **12/12/2024** between **Timbercreek East Townhomes** hereinafter designated as LANDLORD and **Haley TEST** hereinafter designated as TENANT, whether one or more, for the premises described as: **1721 SE Timbercreek Court, Blue Springs, MO 64015**

The terms "you" and "your" refer to all Tenants listed in this lease. The terms "us," "us," and "our" refer to the Landlord(s) listed above or to a legally designated agent(s) of the Landlord(s). The term "Landlord" includes the Landlord's agents and employees.

a. AGENT FOR LANDLORD: **First Pacific Group** whose address is **Timbercreek East Townhomes, 1880 SE Timbercreek Court, Blue Springs, MO 64015** is authorized to manage the premises. LANDLORD or agent for service

Another pop up will appear confirming that you want to finalize. Click Yes.

Finalize Lease

Do you wish to finalize this lease?

CancelYes

Renewal Lease Generation

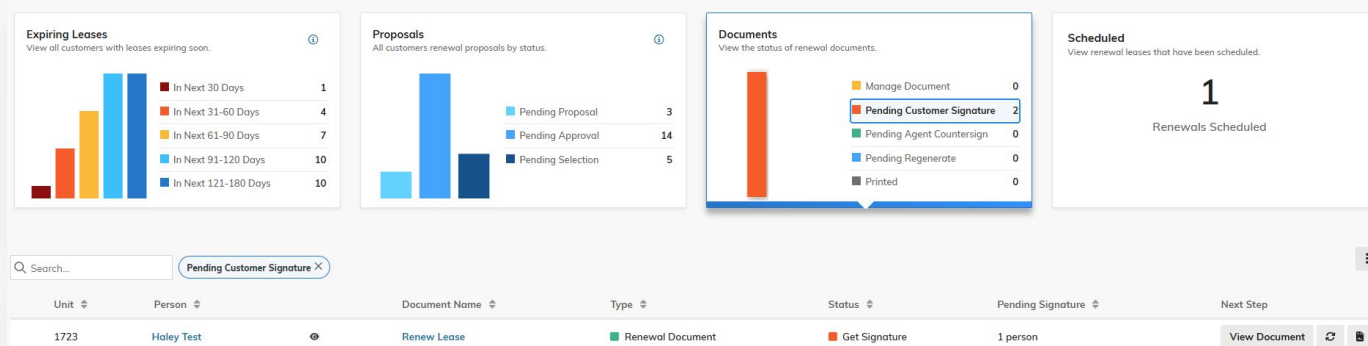


When the renewal lease has been sent you can view it under the resident Documents or the Renewal Dashboard.

Renewals Dashboard

Property
Timbercreek East Townhomes (te) x

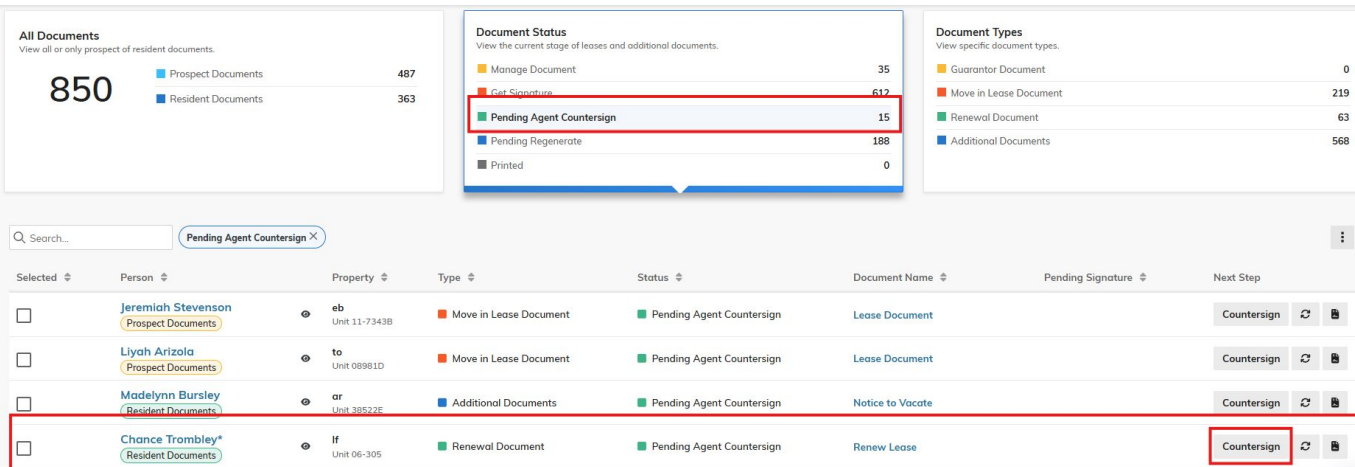
Individual Batch Tiered



To countersign a Renewal lease navigate to the Documents Dashboard → Click Pending Agent Countersignature → Find your document → Click Countersign. This will sign all pages for you at one time!

Documents

Property
All main props by % (allby, list) x

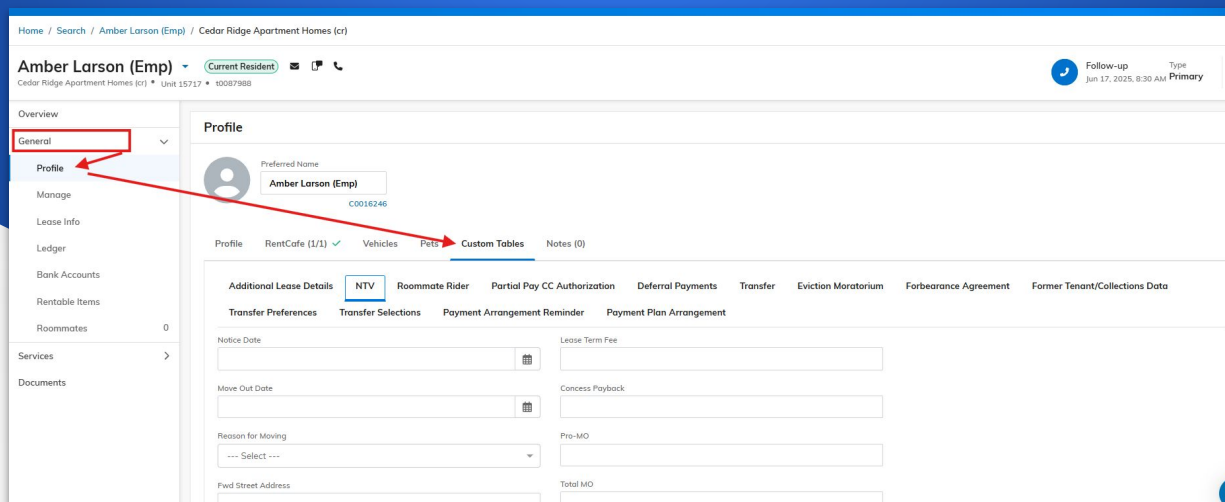


NOTICE TO VACATE

Locate the Resident Account in CRM IQ by navigating the following :

- In the **Search Bar**
- Type the residents Full Name or Unit number

By default, you land on the Overview section of the **Resident** screen. Click General in the menu → Profile → Custom Tables→ Select NTV → Fill in the information → Once complete hit Save.



Home / Search / Amber Larson (Emp) / Cedar Ridge Apartment Homes (cr)

Amber Larson (Emp) Current Resident Unit 15717 40087988

Follow-up Jun 17, 2025, 8:30 AM Type Primary

Overview

- General
- Profile
- Manage
- Lease Info
- Ledger
- Bank Accounts
- Rentable Items
- Roommates
- Services
- Documents

Profile

Preferred Name
Amber Larson (Emp)
C0016246

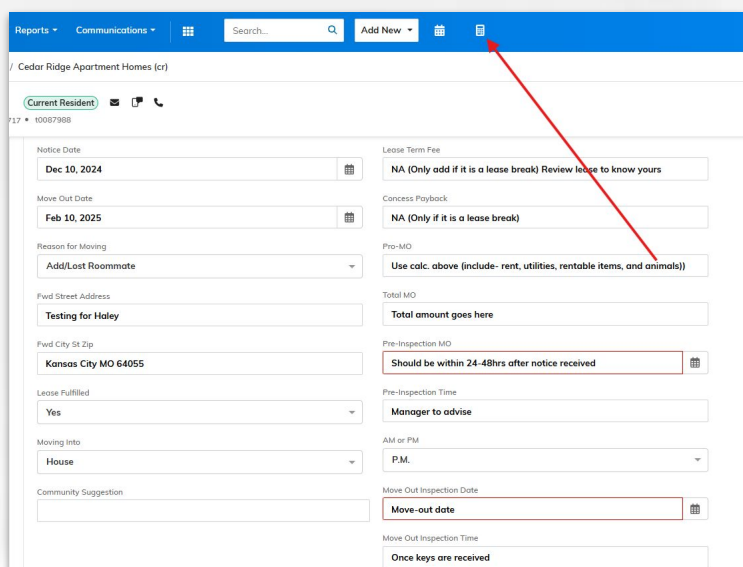
Profile RentCafe (1/1) Vehicles Pets Custom Tables Notes (0)

Additional Lease Details NTV Roommate Rider Partial Pay CC Authorization Deferral Payments Transfer Eviction Moratorium Forbearance Agreement Former Tenant/Collections Data

Transfer Preferences Transfer Selections Payment Arrangement Reminder Payment Plan Arrangement

Notice Date
Move Out Date
Reason for Moving
--- Select ---
Pwd Street Address

Lease Term Fee
Concess Payback
Pro-MO
Total MO



Reports Communications Add New

/ Cedar Ridge Apartment Homes (cr)

Current Resident Unit 15717 40087988

Notice Date
Dec 10, 2024

Move Out Date
Feb 10, 2025

Reason for Moving
Add/Lost Roommate

Pwd Street Address
Testing for Haley

Pwd City St Zip
Kansas City MO 64055

Lease Fulfilled
Yes

Moving Into
House

Community Suggestion

Lease Term Fee
NA (Only add if it is a lease break) Review lease to know yours

Concess Payback
NA (Only if it is a lease break)

Pro-MO
Use calc. above (include- rent, utilities, rentable items, and animals)

Total MO
Total amount goes here

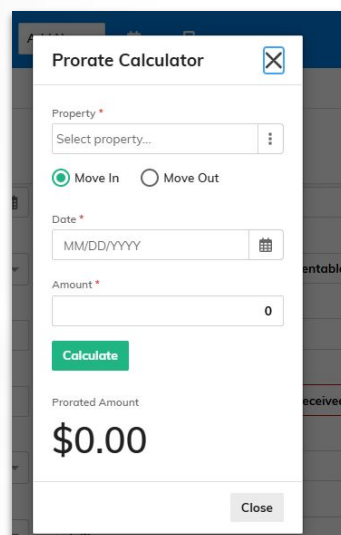
Pre-Inspection MO
Should be within 24-48hrs after notice received

Pre-Inspection Time
Manager to advise

AM or PM
P.M.

Move Out Inspection Date
Move-out date

Move Out Inspection Time
Once keys are received



Prorate Calculator

Property
Select property...

Move In Move Out

Date
MM/DD/YYYY

Amount
0

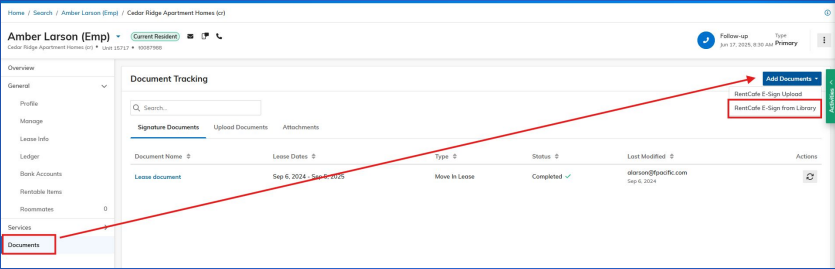
Calculate

Prorated Amount
\$0.00

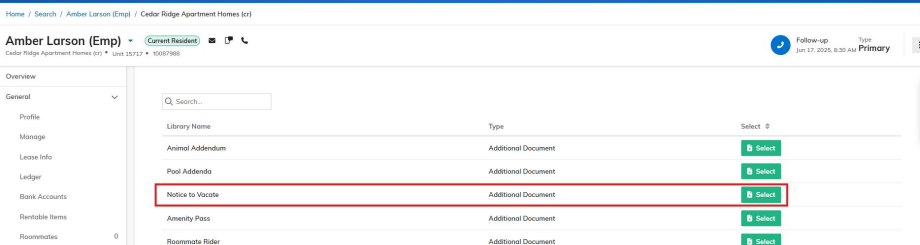
Close

NOTICE TO VACATE

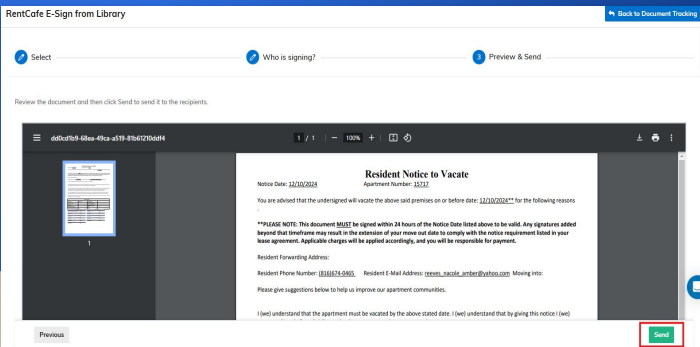
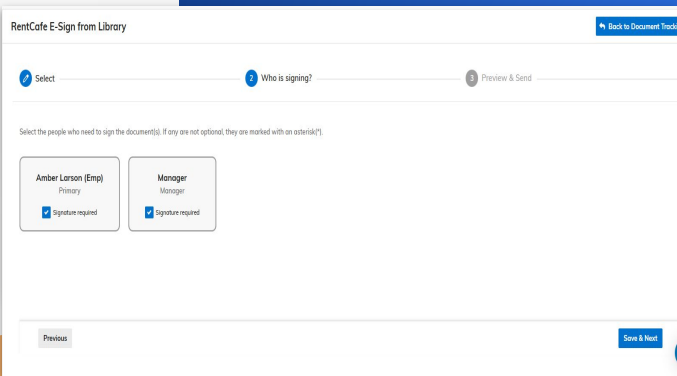
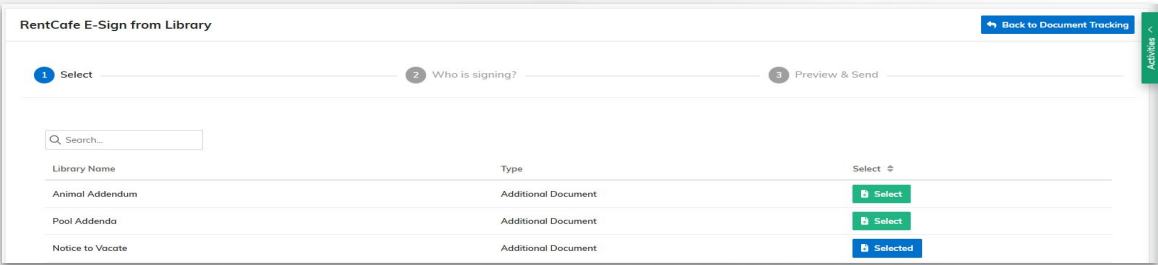
To send the document on the left hand menu click Documents → Add Documents → RentCafe E-Sign from Library.



Select your document



After selecting it will ask Who is signing (select all that apply) and then Preview & Send.



NOTICE TO VACATE

To countersign you'll locate it on the Documents Dashboard → Pending Agent Countersignature. Only Managers can Countersign. After countersigned you can find it in the attachments.

Home / Search / Marquis White / Cedar Ridge Apartment Homes (cr)

Marquis White

Notice Resident

Cedar Ridge Apartment Homes (cr) • Unit 15900A • 10086581

Overview

General

Services

Documents

Select File

Max Size: 5MB, Valid files: PDF, Text (TXT, CSV, XML), Excel (XLS, XLSX, XLSB), Word (DOC, DOCX, RTF), Image (JPG, JPEG, TIF, BMP, GIF, PNG), Video (MP4, MPG, AVI), Other (ZIP, DWF, DWFx, SVG)

Uploaded Files 06

Resident	Name	Type	Uploaded Date	Portal	Edit	Preview	Download	Delete
Marquis White	MO1stDemandForRent_10086581_12052024.pdf		Dec 5, 2024					
Marquis White	Attachment_10086581_RS_Nov222024110728.pdf	Insurance Documents	Nov 22, 2024	✓				
Marquis White	Attachment_10086581_RS_Nov162024110949.pdf	Insurance Documents	Nov 16, 2024	✓				
Marquis White	Attachment_10086581_NoticeToVacate_Nov112024113200.pdf	Portal Lease Documents	Nov 11, 2024	✓				
Marquis White	CR White 5900A NTV 11.9.24	Move Out Statement	Nov 9, 2024					
Marquis White	TCForbearanceAgreementLetter_10086581_10302024.pdf		Oct 30, 2024					

Now that there is a fully executed document, you will complete the CRM IQ Notice function by navigating to the Resident Overview → General → Manage → Manage → Notice.

Amber Larson (Emp)

Current Resident

Cedar Ridge Apartment Homes (cr) • Unit 15717 • 60087988

Follow-up Jun 17, 2025, 8:30 AM Primary

Overview

General

Profile

Manage

Lease Info

Ledger

Bank Accounts

Rentable Items

Roommates 0

Services

Documents

Manage

Q Search...

Date	Action	Notes	Agent	Details
Sep 9, 2024	Move In	Move In	Kandi Smith	

Reverse Move In

Assign Unit

Apply Deposit

Adjust Lease End

Evict

Month To Month

Notice

Promote Roommate

Unit Transfer

Renew Lease

NOTICE TO VACATE

Complete the Filter on the Notice section and then click Save. The details in the filter should match what is on the executed NTV Document.

Notice

Termination Type *

--- Select ---

Notice Date *

Dec 10, 2024

Move Out Date *

MM/DD/YYYY

Reason For Move Out *

SELECT REASON

Agent

Post Early Termination Fee

Close

Save

After clicking save the status will change from Current to Notice. You can view this by going back to the resident profile or in the queue box under residents on notice

Home / Search / Marquis White / Cedar Ridge Apartment Homes (cr)

Marquis White

Notice Resident

Cedar Ridge Apartment Homes (cr)

Unit 15900A

t0086581

Overview

General

Services

Documents

Customer Information

Name

Marquis White

Customer ID

C0229664

Resident Status

Status

Notice

Ledger Balance

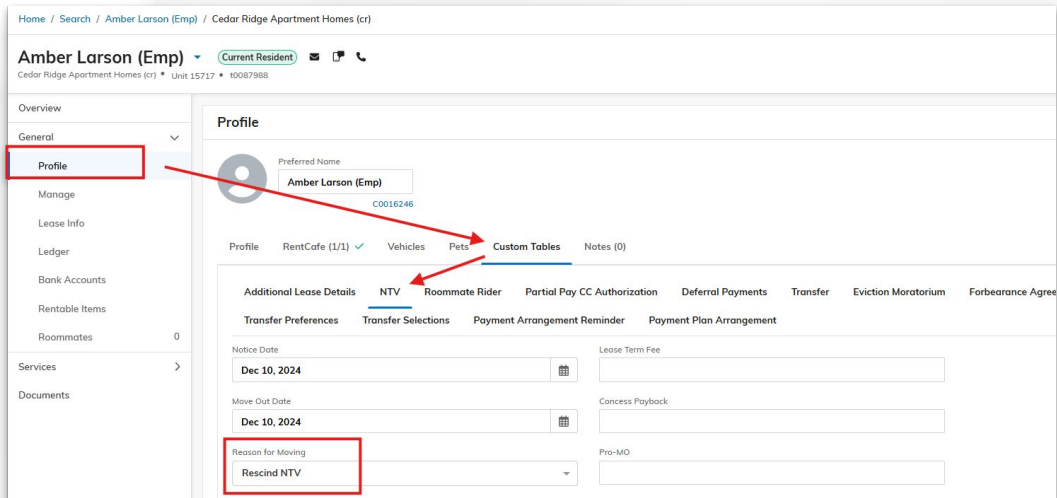
\$1,344.00

Priority (5)	Applicants (1)	Residents (4)
Needs Renewal		67
Month to Month		5
On Notice		4
Evict		10
Needs Move Out		0
Pending Deposit Accounting		4

Cancelling A Notice to Vacate

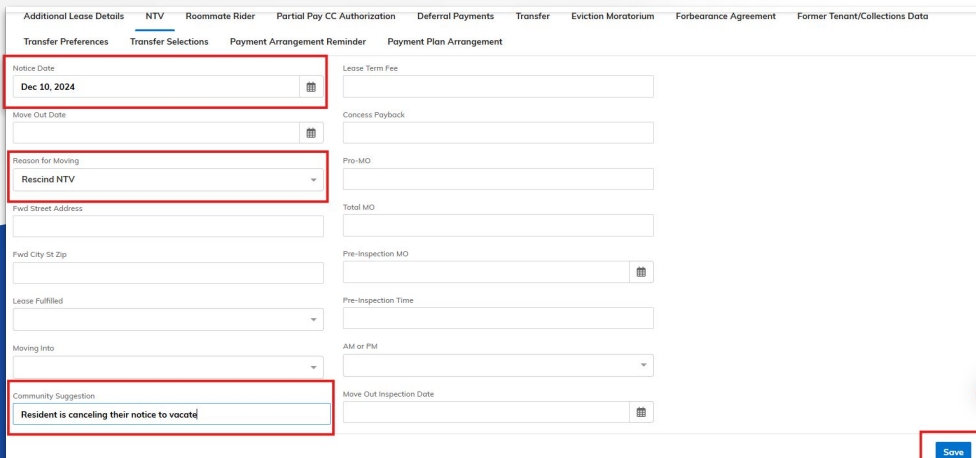
If a Resident notifies you that they would like to cancel their Notice to Vacate, you will need to regenerate the NTV form for them to sign to rescind their notice.

Navigate to the Residents **Overview** → General → Profile → Custom Tables → NTV → Save.



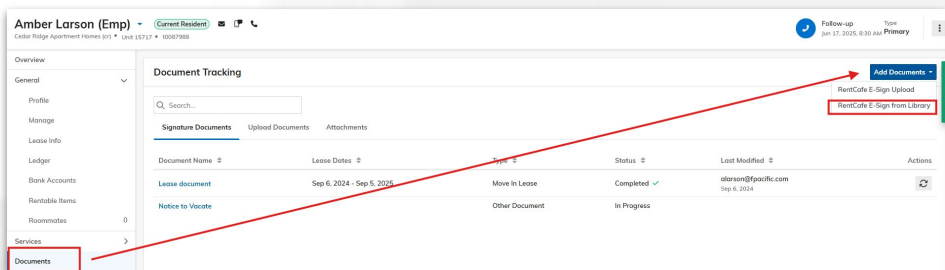
You will notice all of the old information is still populated into the **Filter** fields. These will need to be cleared out and only the **Date**, **Reason for Moving** and **Community Suggestion** will be filled out with the following information.

- Date- Today's Date
- Reason For Moving- Rescind NTV
- Community Suggestion- Resident is cancelling their notice to vacate
- Click **Save**

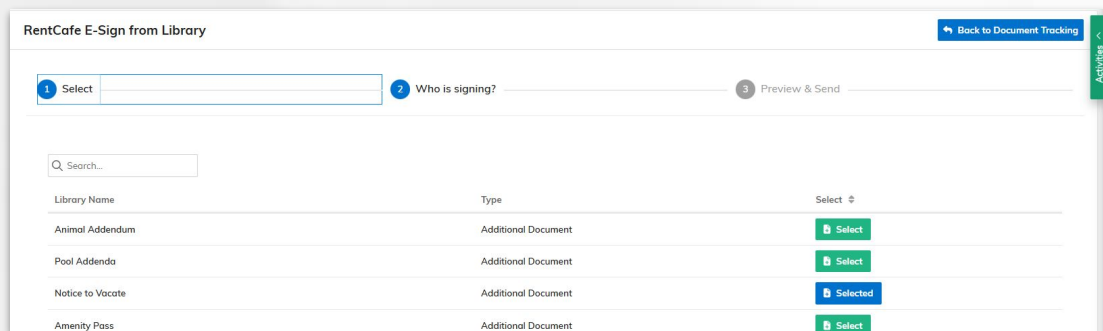


Cancelling A Notice to Vacate

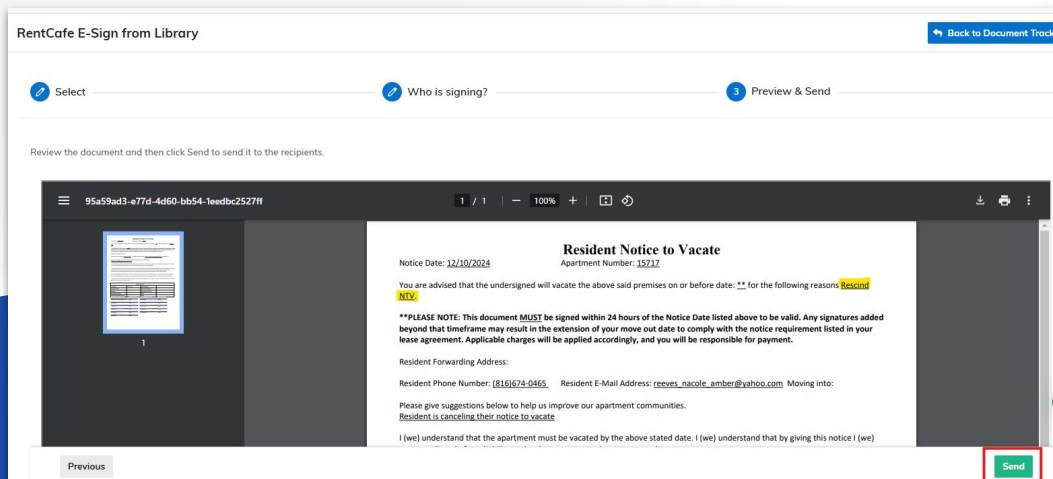
After Saving the info go to Documents → Add Documents → RentCafe E-Sign from Library



Select Notice to Vacate and review who is signing.



This will bring you back to the Preview & Send. Verify that the info has updated and click Send.



Cancelling A Notice to Vacate

Once the residents signs and the Manager Countersigns the NTV will need to be canceled. To do this go back to the resident account → General → Manage → Manage → Cancel Notice.

Marquis White

Notice Resident

Cedar Ridge Apartment Homes (CR) • Unit 15900A • 10086581

Overview

General

Profile

Manage

Lease Info

Ledger

Bank Accounts

Rentable Items

Roommates

0

Services

Documents

Manage

Search...

ADJUST MOVE OUT DATE

Manage

Date	Action	Notes	Agent	Details
Nov 14, 2024	Notice Given	Unhappy	Amber Larson	Apply Deposit Cancel Notice Deposit Accounting Move Out Promote Roommate Unit Transfer

| Jan 11, 2024 | Move In | Move In | Kristal Ruelas | |

This brings you to the **Cancel Notice** screen. Update the Agent and click Cancel Notice.

Cancel Notice

Termination Type

Notice

Notice Date

Nov 9, 2024

Move Out Date

Jan 13, 2025

Reason for Move Out

Unhappy

Agent

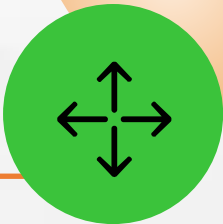
Select Agent

Close

Cancel Notice

CRM IQ

Move Out



Once a resident has turned in keys, you will move them out of the system.
Click Residents in the Queue box → Needs Move out

Agent Dashboard

Daily Completion Score

Completion rate of pending items for the property from the past day

0%

Completed

Pending

Last updated at: -

Priority (114)

Applicants (1)

Residents (2)

Needs Renewal	20
Month to Month	2
On Notice	2
Evict	1
Needs Move Out	2
Pending Deposit Accounting	0

This will show all pending move outs for the day. Choose your resident and click Move-out

Agent Dashboard

Daily Completion Score

Completion rate of pending items for the property from the past day

0%

Completed

Pending

Last updated at: -

Priority (114)

Applicants (1)

Residents (2)

Needs Renewal	20
Month to Month	2
On Notice	2
Evict	1
Needs Move Out	2
Pending Deposit Accounting	0

Property

Timbercreek East Townhomes (te)

Agent

Select Agent

Event Type

Select events

Add New

< Today >

Sun 8 Dec	Mon 9 Dec	Tue 10 Dec	Wed 11 Dec	Thu 12 Dec	Fri 13 Dec	Sat 14 Dec
		Property Blackout Timbercreek East Town... 12:00 PM - 1:00 PM CST		Move Out Haley TEST 1723 08:00 AM CST		

Search...

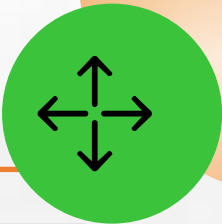
2 Needs Move Out

Customer	Property	Status	Roommates	Last Activity	Move Out Date	Next Step
Haley Test resident notice	Timbercreek East Townhomes Unit: 1723	Needs Move Out		Notice Given Dec 12, 2024	Dec 12, 2024	Move Out
Edith Large resident notice	Timbercreek East Townhomes Unit: 1846	Needs Move Out	Jason Wilson	Notice Given Sep 25, 2024	Nov 26, 2024	Move Out

Page | 139

CRM IQ

Move Out



A pop up will appear confirming Notice Date, Move out Date, and Reason for Move-out. Click Save.

Move Out

Notice Date

Dec 12, 2024

Move Out Date

Dec 12, 2024

Reason For Move Out

Need More/Less Space

Close

Save

Another pop up will appear confirming that the move-out has posted.

✓ Move Out Posted

Property

Timbercreek East Townhomes (te)

Agent

Select Agent

This will update the Resident's Status from Notice to Past.

Ensure that you have received the Resident's updated **Forwarding Address** and **Phone Number** for all leaseholders.

Home / Search / Haley TEST / Timbercreek East Townhomes (te)

Haley TEST

Past Resident

Timbercreek East Townhomes (te)

Unit 1723

10088256

Overview

General

Services

Documents

Customer Information

Name

Haley TEST

Customer ID

C0342929

Phone

RentCafe Status

Registered

Preview RentCafe Account

Email

TESTINGAPP@GMAIL.COM

Preferred Contact Method

None

Resident Status

Status

Past

Ledger Balance

\$1,702.41

Move In/Out

Dec 12, 2024 - Dec 12, 2024

Late / NSF

0 / 0

Lease Term

Dec 12, 2024 - Jan 1, 2025

Resident ID

t0088256

Vehicle(s)

0

Add

Prospect ID

p0437482

Roommates

0

Add

Pets(s)

0

Add



Adding A Roommate to A Current Resident



To add a new roommate to an existing resident's account, simply click Add under the Resident Status.

Home / Search / Amber Larson (Emp) / Cedar Ridge Apartment Homes (cr)

Amber Larson (Emp) - Current Resident

Cedar Ridge Apartment Homes (cr) • Unit 15717 • 10087988

Overview

General

Profile

Manage

Lease Info

Ledger

Bank Accounts

Rentable Items

Roommates 0

Services

Customer Information

Name: **Amber Larson (Emp)** Customer ID: C0016246

Phone: (816) 674 - 0465 RentCafe Status: Registered

Email: reeves_nacole_amber@yahoo.com

Preferred Contact Method: None

Resident Status

Status: Current Ledger Balance: \$298.00

Move In/Out: Sep 6, 2024 - N/A Late / NSF: 1 / 0

Lease Term: Sep 6, 2024 - Sep 5, 2025 Resident ID: t0087988

Vehicle(s): 0 Add

Roommates: 0 Add

Unit Details

Property & Space: Cedar Ridge Apartment Homes (cr)

Details: Townhome only | 1175

Unit Address: 15717 E. 4th Independence 64055

You will need to at minimum fill in the **First Name, Last Name, Email address, and Phone number** in order to send the Application Invitation. You will also need to select whether they are an adult or minor. Either create a new customer or select an existing one below.

If you select Create New Customer you'll need to select the Relationship, Move-in Date, Toggle Lessee if an adult, and click Save.

Customer Search

Customer Search

Simple View

First Name: Haley Last Name: Cornish Phone: (580) 291-0000 Email: hcornish+12@fpacific.com

Adult Minor

Find Customer

Create New Customer and Add as Roommate

Name	Phone	Email	Actions
Haley Cornish ✓	(000) 000 - 0000	testtesttest@gmail.com	Add as Roommate
Haley Cornish ✓	(580) 091 - 2345	testhaleycornish@gmail.com	Add as Roommate
Haley Cornish ✓	(200) 000 - 0000	trainingtest@gmail.com	Add as Roommate
HALEY Cornish ✓	(580) 291 - 2765	hlyncicrnsh@gmail.com	Add as Roommate
Haley Cornish ✓	(567) 843 - 9209	test123test456test@gmail.com	Add as Roommate

New Roommate

* indicates required fields

First Name * Haley

Last Name * Cornish

Email hcornish+12@fpacific.com

Move In Date * Move In

Relationship * choose...

Cell Phone (580) 291-0000

Lessee

Date of Birth DOB

Cancel Save

Adding A Roommate to A Current Resident



Once you click Save, you will need to click **Invite to Online Application** button.

Roommates

Add Roommate

Current Roommates

Name	Phone Number(s)	Email	Occupant Type	Move In	Move Out	
Amber Larson (Emp)	(816) 674 - 0465	reeves_nicole_amber@yahoo.com	Primary	Sep 6, 2024		Edit

Future Roommates

Name	Contact	Occupant Type	Move In	Move Out	Status	
Haley Cornish	hcornish+12@fpacific.com	Roommate	Dec 10, 2024		Not invited	Invite to Online Application

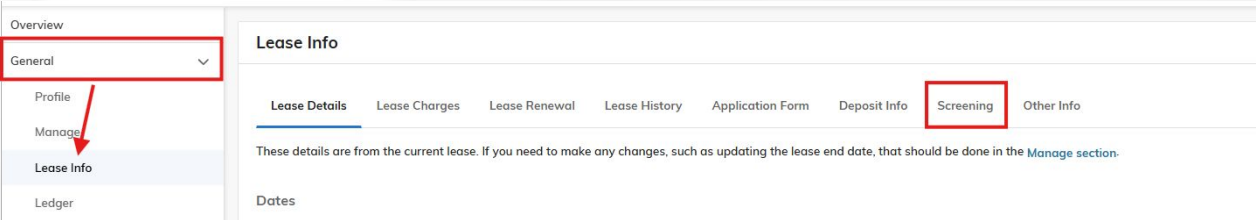
Once the roommate completes the online application and pays, you will manually process screening. Once Approved, you will utilize the Roommate Rider Agreement to generate the Additional Roommate to the lease.

CRM IQ

Screening Manually



Once the new roommate has completed the online application, you will go to the Resident's **Profile** screen and click General → Lease info → Screening



Overview

General

Profile

Manage

Lease Info

Ledger

Lease Info

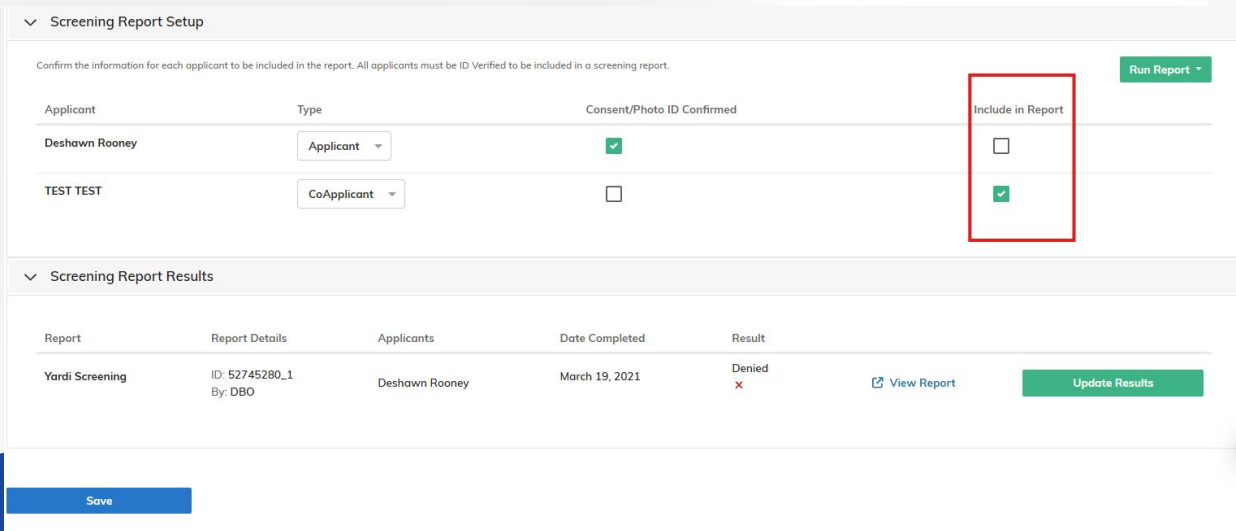
Lease Details Lease Charges Lease Renewal Lease History Application Form Deposit Info Screening Other Info

These details are from the current lease. If you need to make any changes, such as updating the lease end date, that should be done in the Manage section.

Dates

This will bring up the screening information for all applicants including the current resident(s) with their initial screening decision information. Since we are adding a new roommate, we DO NOT want to re-screen the current residents. Uncheck the current resident from include in report.

Note: It's your responsibility to confirm that the roommate has fully filled out the application with the correct information. If any information is incorrect the roommate will need to be charged another app fee to update the info.



Screening Report Setup

Confirm the information for each applicant to be included in the report. All applicants must be ID Verified to be included in a screening report.

Run Report

Applicant	Type	Consent/Photo ID Confirmed	Include in Report
Deshawn Rooney	Applicant	☒	☐
TEST TEST	CoApplicant	☐	☒

Screening Report Results

Report	Report Details	Applicants	Date Completed	Result	
Yardi Screening	ID: 52745280_1 By: DBO	Deshawn Rooney	March 19, 2021	Denied x	View Report Update Results

Save

CRM IQ

Screening Manually



If everything is accurate click the report drop down and select Yardi Screening.

Lease Details Lease Charges Lease Renewal Lease History Application Form Deposit Info **Screening** Other Info

Consolidated Results

Result	Reason	Completed On
Denied	Regional Approval	March 19, 2021

▼ Screening Report Setup

Confirm the information for each applicant to be included in the report. All applicants must be ID Verified to be included in a screening report.

Applicant	Type	Consent/Photo ID Confirmed	Include in Report	Run Report ▼
Deshawn Rooney	Applicant	☒	☐	Yardi Screening
TEST TEST	CoApplicant	☐	☒	Other
				Criminal
				Guarantor

This will automatically log you into the **ScreeningWorks** database to process the screening.

Screening Login - Yardi Resident Screening

Processing Request... This may take up to 2 minutes. If the request times-out, please contact your applicant screening provider before attempting another request.

You will be directed to the **Property Screening Result** page in **ScreeningWorks**. This will show you the initial decision for the applicant.

ScreeningWorks
PRO

Welcome Timbercreek East Townhomes (P3587)

[Find Applicant](#) [Corporate Applications](#) [Help](#) [Logout](#)

Property Screening Result

APPLICATION RESULT: ACCEPT WITH CONDITIONS - GUARANTOR

[Print Application](#) [Refresh](#) [View Guarantors](#)

NOTE: You should not disclose any screening results with the applicant. *SC's screening report will automatically send per CA Law*. You will then send the information over to Ruanne to review.

Once Approved, you will generate the Roommate Rider Agreement to add the Additional Roommate to the lease.

Roommate Rider POLICY



The Roommate Rider will be utilized when you are adding, removing or changing the name of resident during a lease term. Since the lease cannot be re-generated with the change, the Roommate Rider will be signed by all parties acknowledging the change.

Only a Manager / Assistant Manager should complete this process.

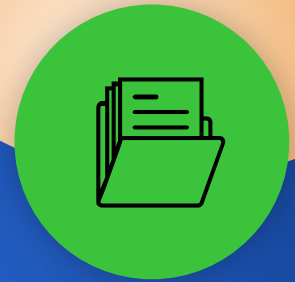
All remaining leaseholders must submit their 2 most recent pay stubs to confirm they qualify to remain in the unit.

- All leaseholders remaining must have been screened through First Pacific screening. If they have not, they must be screened.
- If a guarantor is being removed, screening must be run on all the remaining residents – If an additional deposit is required, this must be paid in full prior to the guarantor being removed.

Once all pay stubs have been received and any screening required has been completed, send to Ruanne or Jane to approve the removal of the roommate.

Once approved by Ruanne, your manager will generate the Roommate Rider.

- If the primary resident is the one leaving, you must first complete the Roommate Rider to have everyone sign off on removing them. Once it is signed by all leaseholders and countersigned, manager can then use the Promote Roommate Function to remove the Primary.
- If a roommate is leaving, you can use the Roommate Rider as instructed.



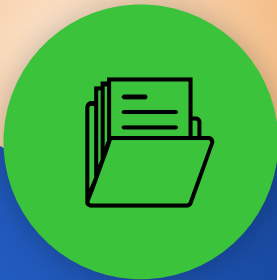
Roommate Rider

- From the Resident's profile, click on Custom Tables → Roommate Rider
- Enter the Resident Code of the resident who is being added, deleted or name changed and fill in the Residents Staying / Leaving and the Move in or Move Out effective date. *Note- If adding a roommate, the roommate should have already been added via Roommates tab and screening ran.
- If Name change, enter the reason for name change and the previous name. *NOTE- name should be updated to the new name via the Roommates tab.
- Hit Save

The screenshot shows the 'Roommate Rider' form within a CRM system. The left sidebar contains a navigation menu with 'Profile' highlighted. The main content area has tabs for 'Profile', 'RentCafe (0)', 'Vehicles', 'Pets', 'Custom Tables', and 'Notes (0)'. The 'Custom Tables' tab is active, showing a 'Task' dropdown set to 'Addition'. Below this are fields for 'Residents Staying' (T0895645), 'Residents Leaving', 'Added Resident Code' (R0098956), 'Deleted Resident Code', 'Move-In Effective Date' (Dec 12, 2024), 'Move-Out Effective Date', 'Reason for Name Change', 'Previous Name', and 'New Name'. A 'Save' button is located at the bottom right.

You'll then go to Documents → Add Documents → RentCafe E-Sign from Library

The screenshot shows the 'Document Tracking' interface. The left sidebar has 'Documents' highlighted. The main content area has a 'Document Tracking' header with a search bar and tabs for 'Signature Documents', 'Upload Documents', and 'Attachments'. A table with columns 'Document Name', 'Lease Dates', 'Type', 'Status', 'Last Modified', and 'Actions' is visible. A red arrow points from the 'Documents' tab in the sidebar to the 'Add Documents' button in the top right corner. Below this button, two options are listed: 'RentCafe E-Sign Upload' and 'RentCafe E-Sign from Library', with the latter being highlighted by a red box.



Roommate Rider

Select Roommate Rider → Then select who will be signing → Preview & Send

RentCafe E-Sign from Library

Back to Document Tracking

1 Select

2 Who is signing?

3 Preview & Send

Search...

Library Name	Type	Select
Animal Addendum	Additional Document	Select
Pool Addenda	Additional Document	Select
Notice to Vacate	Additional Document	Select
Roommate Rider	Additional Document	Selected
Partial Pay CC Agreement	Additional Document	Select

Review the information and click Send. This will send the document to the resident portal they will all sign and the manager will countersign.

1 Select

2 Who is signing?

3 Preview & Send

Review the document and then click Send to send it to the recipients.

3a4efc76-27b1-4354-998a-d01caa76738b

1 / 1 | 100%

1

RESIDENCY RIDER AGREEMENT

This document dated **12/12/2024** is incorporate into and shall become a part of that certain Residency Agreement by and between **Timbercreek East Townhomes** as agent for owner and Resident(s) **Deshawn Rooney and TEST TEST** for lease term beginning **07/16/2024** and ending **09/15/2025** for premises described as: **1700 SE Timbercreek Court**.

Any of the following covenants initiated by the parties opposite of respective covenant shall become a part of and incorporated in said Residency Agreement as though fully set forth therein. In the event of any conflict, inconsistency or incongruity between the covenants initiated and hereinafter and any of the provisions of said Residency Agreement, the initiated covenants hereinafter set forth shall govern. All other terms, covenants, and conditions of the said Residency Agreement shall remain in full force and effect.

[X] COVENANT I. ADDITION OF RESIDENTS:

The following person(s) herewith agree to become a tenant under the terms of the above described Residency Agreement and agree to be bound by all covenants, terms, and conditions thereof effective **12/12/2024**. The tenants shall pay all rent for the remaining part of the term of the Residency Agreement payable in monthly installments of **Currency**.

[] COVENANT II. DELETION OF RESIDENTS:

_____ is hereby deleted from the above described Residency Agreement effective **_____**, and the said **T0895645**, remaining resident(s) is only responsible under the terms, conditions, and covenants of the Residency Agreement to said effective date. Responsibility for the balance of the Agreement shall remain solely in the name(s) of **T0895645** who shall pay as rent for the remaining term of the Agreement payable in monthly installments of **_____** in advance. The SECURITY DEPOSIT remains in the possession of **T0895645** and **_____** relinquishes all rights to said security deposit and is herewith the absolved of all responsibility to above named Agreement.

Previous

Send

Page | 147

Unit Transfer Policy



Resident must be in good standing with First Pacific Group and have resided for 6 months in their apartment before they are eligible for transfer. No late pays or lease violations within the last 6 months. Resident must be current with their rent payment with no past due balance.

A 30-DAY WRITTEN NOTICE IS REQUIRED. This notice must be received no later than the first day of the month. All Lease Holders must sign both the Notice and Transfer Form.

A \$500 Transfer fee must be paid if current lease will not expire by transfer date. **Transfer fee must be paid in the form of certified funds (Debt/CC card or WIPS) and is due when notice to vacate is provided.**

The Administrative fee is waived on transfers.

If all leaseholders are remaining the same and have met the First Pacific Criteria at the time of move in a new application will not be required. A new deposit equal to the same amount of the existing deposit will be required to secure the new apartment. Current proof of income will be required from each lease holder and must meet the income requirement of 3 times the rental amount.

Residents must qualify under First Pacific criteria. If there is any change in lease holders all lease holders must apply online and pay the application fee per applicant to be screened by First Pacific. Rental Criteria will be based on the evaluation of all Lease Holders entering into the new lease agreement. Deposit required will be based on the risk factor per the criteria and must be paid within 24 hours of determination. Current proof of income is required from all Lease Holders.

Unit Transfer Policy



Once approved the required utility companies need to be contacted to transfer service from your existing apartment to your new apartment. Service for the new apartment shall be on the day of move in.

An inspection of the apartment must be scheduled at the time of request and performed within 3 days of the notice to vacate. All damage or additional fees must be paid with certified funds prior to transferring. If a balance is owed due to move out charges these charges will be transferred to the new apartment and must be paid with the next rental period. Failure to pay in full can result in eviction.

Unit Transfer system function in CRM will ONLY be used when ALL residents from one unit are ALL transferring to a new unit on the same property. If any residents from the old unit are leaving or any residents are being added to the new unit, the Transfer Function in CRM WILL NOT be utilized. If old residents are leaving or new ones being added on, they will all go through the Online Application process to register and reserve the new unit and will be auto screened to qualify for the new unit. Even though we are making them register like new, does not mean we cannot still use the 'transfer' verbiage and our 'transfer' policy when talking with the resident. This change ONLY affects the workflow on entering a transfer in the system. Instructions sent in email.

Residents will pick up keys on a Friday and their new lease will take effect that day. They will be set up as a Transfer within Yardi and the move out date will be set for Sunday (i.e. pick up keys and lease effective 12/13/24, Move out set for 12/15/24). Keys must be turned in by 9am on Monday (i.e. 12/16/24) and moved out of Yardi effective Sunday (i.e. 12/15/24). If keys are not turned in first thing Monday morning adjust the move out date to Monday and they will be responsible for that day of rent.

Unit Transfer Policy



Yardi will auto credit for 2 days (move out date and move in date). When calculating their rent for the month (pro-in and pro-out) credit 2 days so totals match and then no manual adjustments need to be.

Resident is required to pay the total due for both apartments for the entire month. On their portal they will pay their pro-out on their current account and the balance due for their new apartment by the time rent is due. Please note the resident will have 2 accounts on the portal – they use the same login for both. Inform the resident prior to the 1st of the month they are transferring so they are aware they **MUST** pay the total due for both apartments in order to transfer.

Unit Transfer Policy



FIRST PACIFIC

FIRST PACIFIC GROUP, INC.

TRANSFER POLICIES AND GUIDELINES

- Resident must be in good standing with First Pacific Group and have resided for 6 months in their apartment before they are eligible for transfer. No late pays or lease violations within the last 6 months. Resident must be current with their rent payment with no past due balance.
- A 30-DAY WRITTEN NOTICE IS REQUIRED. This notice must be received no later than the first day of the month. All Lease Holders must sign both the Notice and Transfer Form.
- A \$500 Transfer fee must be paid if current lease will not expire by transfer date. Transfer fee must be paid in the form of certified funds (Debt/CC card or WIPS) and is due when notice to vacate is provided.
- The Administrative fee is waived on transfers.
- If all lease holders are remaining the same and have met the First Pacific Criteria at the time of move in a new application will not be required. A new deposit equal to the same amount of the existing deposit will be required to secure the new apartment. Current proof of income will be required from each lease holder and must meet the income requirement of 3 times the rental amount.
- Residents must qualify under First Pacific criteria. If there is any change in lease holders all lease holders must apply online and pay the application fee per applicant to be screened by First Pacific. Rental Criteria will be based on the evaluation of all Lease Holders entering into the new lease agreement. Deposit required will be based on the risk factor per the criteria and must be paid within 24 hours of determination. Current proof of income is required from all Lease Holders.
- Once approved the required utility companies need to be contacted to transfer service from your existing apartment to your new apartment. Service for the new apartment shall be on the day of move in.
- An inspection of the apartment must be scheduled at the time of request and performed within 3 days of the notice to vacate. All damage or additional fees must be paid with certified funds prior to transferring. If a balance is owed due to move out charges these charges will be transferred to the new apartment and must be paid with the next rental period. Failure to pay in full can result in eviction.

Current Address _____ Property: _____

New Address _____ Property: _____

NEW RENT \$ _____ TRANSFER DATE: _____

NEW DEPOSIT \$ _____ LEASE TERM: _____

RESIDENT

RESIDENT

COMMUNITY MANAGER

Inspection

INSPECTED BY _____ DATE INSPECTED _____

Unit Transfer

The Unit Transfer function will allow you to process all unit transfers when a resident has formally extended their stay with us in a different unit than the one they currently occupy.

*****IMPORTANT NOTE: The only time the Unit Transfer function will be necessary is if ALL of the residents in one unit are ALL transferring to the new unit on the same property. If some residents are leaving or new residents being added, the Unit Transfer function will not be used. All remaining or new residents will re-register and reserve the new unit via the Online Application process.**

Typically the unit transfer procedure flows in the following order :

1. The resident submits a transfer notice to the leasing office.

2. You help the resident determine which unit they will transfer to.

3. You prepare the paperwork for the transfer.

4. You enter the transfer details into CRM following the unit transfer process
 - CRM updates the current resident account to a Notice status
 - CRM also creates a new resident account with a new tCode with the status of Future

5. When you give the resident keys to the 'new' unit, you will process the Move In function.

6. When the resident gives you keys to their 'old' unit, you will complete the Move Out function.

7. Process Deposit Accounting for the 'old' unit that the resident moved out of. The balance of the 'old' account will automatically transfer to the new account.

8. Confirm that the ledgers are accurate for both the old unit and the new one.

Unit Transfer

The first step to processing a transfer is to fill in the transfer form. You can find it under Profile → Custom tables → Transfer → Fill in info → Click Save.

Simon Korec - Current Resident

Timbercreek East Townhomes (te) • Unit 1724 • 10088167

Follow-up: Jan 6, 2025, 8:30 AM Primary

Overview

General

Profile

Manage

Lease Info

Ledger

Bank Accounts

Rentable Items

Roommates: 1

Services

Work Orders: 0

Renters Insurance

WIPS

Documents

Profile

Preferred Name: Simon Korec

C0324566

Profile RentCafe (0/2) Vehicles Pets Custom Tables Notes (0)

Additional Lease Details NTV Roommate Rider Partial Pay CC Authorization Deferral Payments Transfer Eviction Moratorium Forbearance Agreement Former Tenant/Collections Data

Transfer Preferences Transfer Selections Payment Arrangement Reminder Payment Plan Arrangement

Current Property: --- Select --- New Property: --- Select ---

Current Address: New Address:

Transfer Date: New Monthly Rent:

Lease Term: --- Select --- New Monthly Utility:

Current Unit: New Deposit:

Save

After clicking save the resident will need to sign the form via their RentCafe portal. To send it locate Documents → Add Document→ RentCafe E-Sign from Library.

Simon Korec - Current Resident

Timbercreek East Townhomes (te) • Unit 1724 • 10088167

Follow-up: Jan 6, 2025, 8:30 AM Primary

Overview

General

Profile

Manage

Lease Info

Ledger

Bank Accounts

Rentable Items

Roommates: 1

Services

Work Orders: 0

Renters Insurance

WIPS

Documents

Document Tracking

Q Search...

Signature Documents Upload Documents Attachments

Document Name	Lease Dates	Type	Status	Last Modified	Actions
Lease document	Oct 8, 2024 - Oct 7, 2025	Move In Lease	Completed ✓	cgriffin@tpacific.com Oct 7, 2024	🔄
Rental Qualifications	Oct 8, 2024 - Oct 7, 2025	Other Document	Completed ✓	Oct 7, 2024	🔄

Add Documents

RentCafe E-Sign Upload

RentCafe E-Sign from Library

Unit Transfer

Select the document, Select who is signing, and Preview and send the document. Review thoroughly and hit send.

RentCafe E-Sign from Library

Back to Document Tracking

1 Select

2 Who is signing?

3 Preview & Send

Q Search...

Library Name	Type	Select
Animal Addendum	Additional Document	Select
Pool Addenda	Additional Document	Select
Notice to Vacate	Additional Document	Select
Roommate Rider	Additional Document	Select
Partial Pay CC Agreement	Additional Document	Select
Transfer Policy	Additional Document	Selected
Pet Addendum	Additional Document	Select

1 Select

2 Who is signing?

3 Preview & Send

Review the document and then click Send to send it to the recipients.

10d0b652-13de-419a-ab0c-bf6ecfbed53b

1 / 1 | 100% + |

1

FIRST PACIFIC

FIRST PACIFIC GROUP, INC.

TRANSFER POLICIES AND GUIDELINES

- Resident must be in good standing with First Pacific Group and have resided for 6 months in their apartment before they are eligible for transfer. **No late pays or lease violations within the last 6 months. Resident must be current with their rent payment with no past due balance.**
- A 30-DAY WRITTEN NOTICE IS REQUIRED.** This notice must be received no later than the first day of the month. All Lease Holders must sign both the Notice and Transfer Form.
- A \$500 Transfer fee** must be paid if current lease will not expire by transfer date. **Transfer fee must be paid in the form of certified funds (Debit/CC card or WIPS) and is due when notice to vacate is provided.**
- The Administrative fee is waived on transfers.
- If all lease holders are remaining the same and have met the First Pacific Criteria at the time of move in a new application will not be required. A new deposit equal to the same amount of the existing deposit will be required to secure the new apartment. Current proof of income will be required from each lease holder and must meet the income requirement of 3 times the rental amount.
- Residents must qualify under First Pacific criteria. If there is any change in lease holders all lease holders must apply online and pay the application fee per applicant to be screened by First Pacific. Rental Criteria will be based on the evaluation of all Lease Holders entering into the new lease agreement. Deposit required will be based on

Previous

Send

Once signed and countersigned you can now process the transfer.

Unit Transfer

The info will display as a preview and confirm that you want to Post the Transfer.

Transfer Unit

✕ Post Transfer

Transfer Unit

Current

* indicates required fields

Property

Timbercreek East Townhomes (te)

Unit

1724 (Timbercreek East Townhomes - 2 bedroom townhome)

Intended Move-Out Date *

Dec 16, 2024

Notice of Transfer Date *

Dec 16, 2024

Transfer Reason *

Need More/Less Space

New Move In

To Property *

Timbercreek East Townho... ✕ ⋮

To Unit *

1846 (Timbercreek East T... ✕ ⋮

Move In Date *

Dec 16, 2024

New Lease Term

From Date *

Dec 16, 2024

Term *

12

To Date *

Dec 15, 2025

New Rent

New Rent *

\$1,715.00

Unit Transfer

This will generate a message to let you know that the “**Unit transfer was completed successfully**” and will bring you back to the manage to review the transfer. ***Note: You will need to CHARGE a security deposit for the new account.**

Choosing **Post Transfer** will prompt Yardi to do two things:

- The account tagged to the existing unit will now be placed on Notice, with a move-out scheduled for the “Intended Move Out Date” you entered as part of the “Existing Lease Information”. This account will remain on notice until they turn in keys and are moved out of the system. Once Moved out, the next step is to complete the Deposit Accounting for their old account. *****Important Note:** Completing deposit accounting will Automatically transfer any prepaid funds or open charges to the new unit. Deposit accounting DOES NOT need to be completed prior to processing the Move In for the new unit.

-
- A new account tagged to the new unit will be scheduled for a move-in according to the “New Move In Date” you entered as part of the “New Lease Information”. When the resident is issued keys for their new unit, you must process the move-in for their new account in order to complete the transfer process and transfer any prepaid funds or open charges. If there was a balance on the previous account (pre-paid or balance due), it will transfer in bulk to the new account. The ledger description will clearly state which charges and prepaid balances were transferred from the other unit.

Unit Transfer



If you do not finish processing a transfer at one time, you can review the transfer and resume processing it. For example, a resident might submit a transfer notice but still needs to decide whether they want to keep their existing rentable items or reserve new ones. First, you would add the transfer without selecting new rentable items, then, when the resident notifies you of their decision, you would review the transfer in order to select the appropriate rentable items and post the transfer.



You can change the unit to which the resident is transferring, as long as that unit is at the same property as the unit to which the resident was transferring.



If the resident no longer wants to move into the new unit, you can cancel the transfer at any time before you post the transfer. **IMPORTANT NOTE:** If you have posted the transfer and the resident no longer wants to move into the new unit, you must cancel both the new unit move-in and the old unit notice.



To Review, Edit or Cancel an unposted transfer, you will navigate to the residents account in Manage to edit any information. From here you can Adjust Move in Date, Move In New Unit, Cancel Move In, Move Out or Cancel Notice.



If you want to change the Unit or edit any of the transfer options, you must click Finish for all changes to be saved.

Agent Dashboard

Daily Completion Score

Completion rate of pending items for the property from the past day

0%

Completed Pending

Last updated at: -

Priority (28)

Applicants (2)

Residents (3)

Application in Progress

Needs Screening/ Evaluation

Generate Lease

Lease Sent

Countersign Lease

Needs Move In

15

1

0

0

0

1

Calendar

Event Type

Select events

Add New

Today

Sun 15 Dec

Mon 16 Dec

Tue 17 Dec

Wed 18 Dec

Thu 19 Dec

Fri 20 Dec

Sat 21 Dec

Move In

Simon Korec

1846

08:00 AM CST

Property Blackout

Timbercreek East Town...

12:00 PM

08:00 AM CST

Move Out

Simon Korec

1724

08:00 AM CST

Search...

Needs Move In

Person

Simon Korec

resident

future

Property

Timbercreek East Townhomes

Unit: 1846

Dates

Applied:

Move-In: Dec 16, 2024

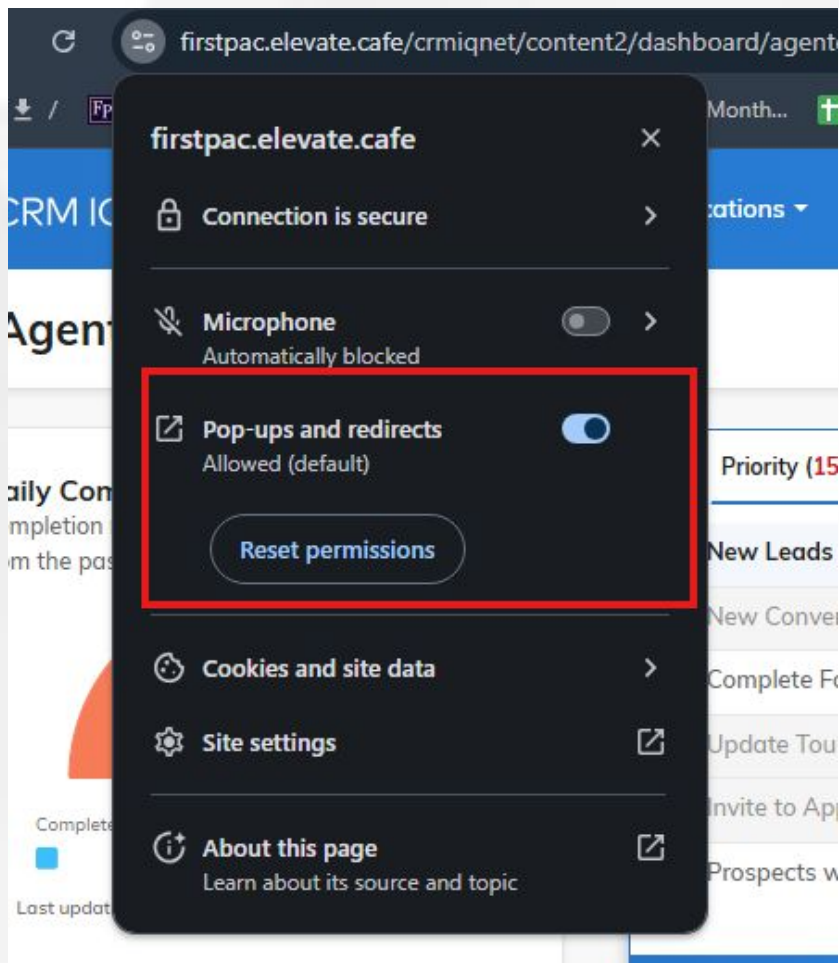
Next Step

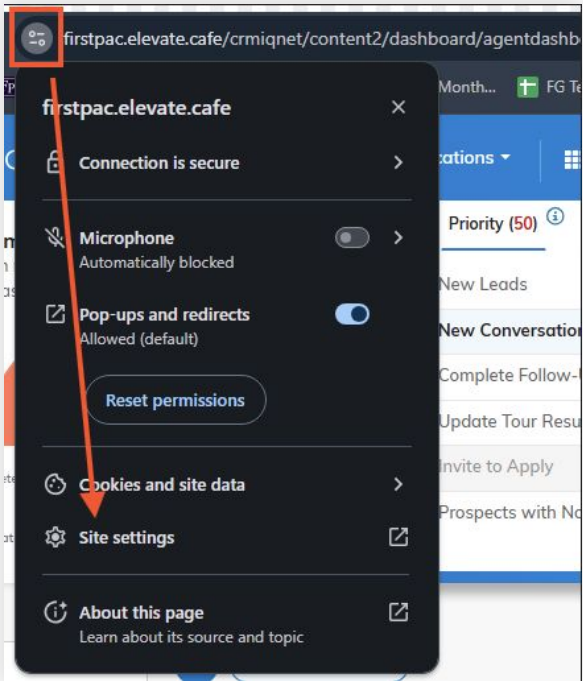
Move In

CRM IQ Pop ups

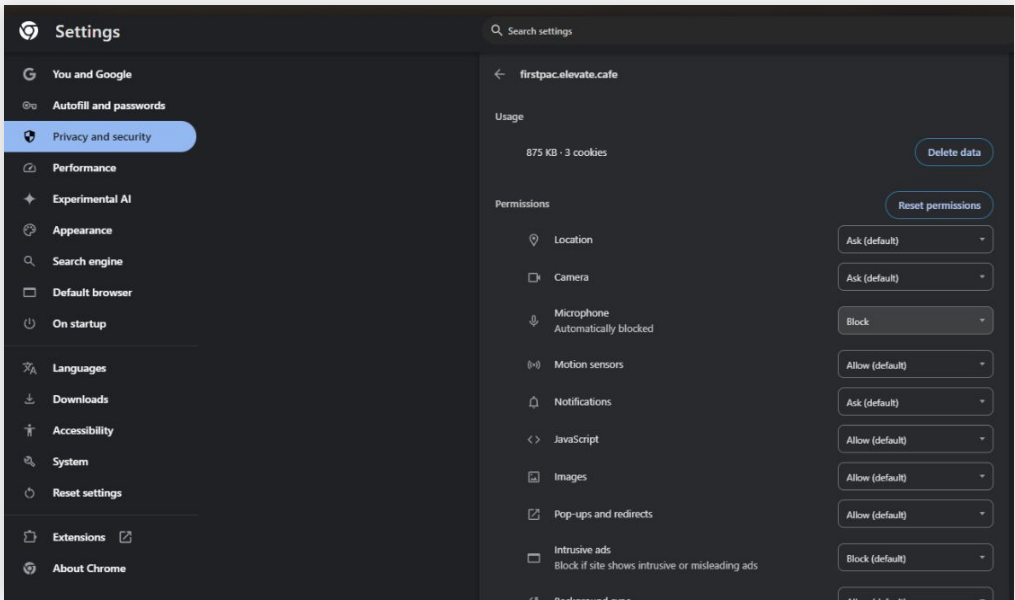


Make sure to click Allow anytime a pop up notification pops up. This will allow you to receive phone calls, texts, see info for updates, etc.





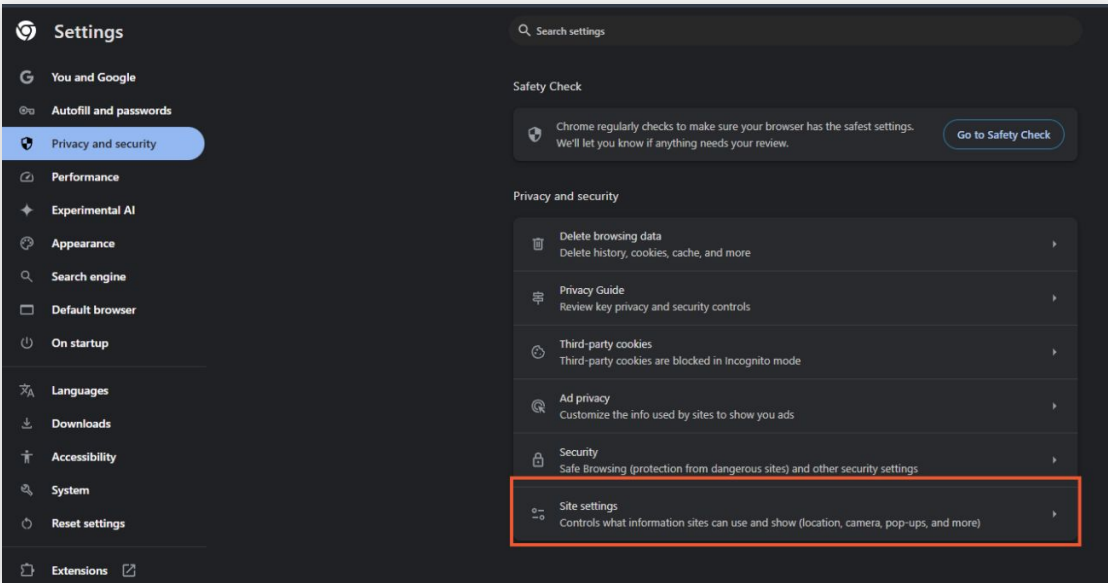
Click View Site Information icons in the top left-hand corner of the search bar and then click site settings



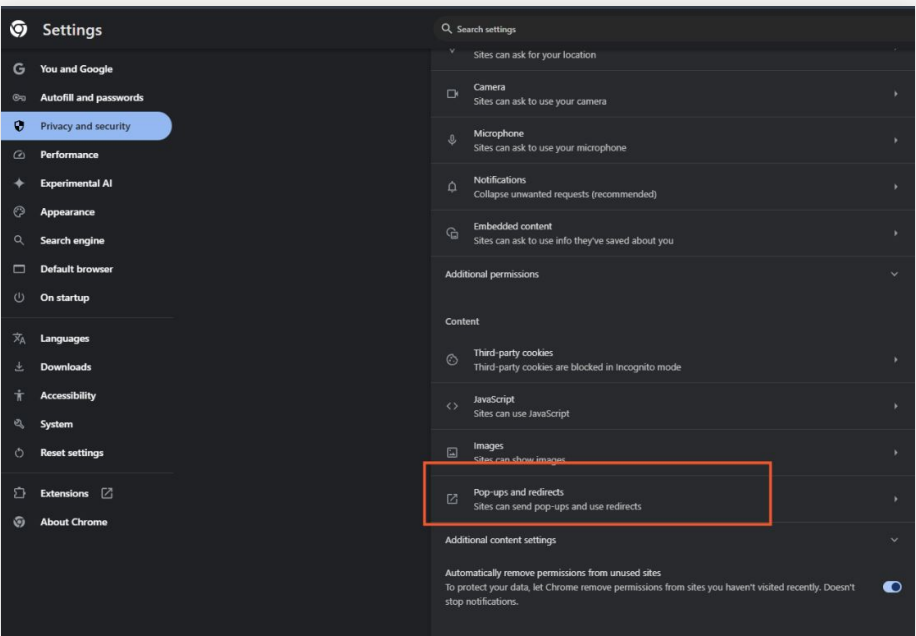
Although it says its on Privacy and security click it again.



It should look like this and then
click Site Settings



Scroll down to
Pop-ups and
redirects

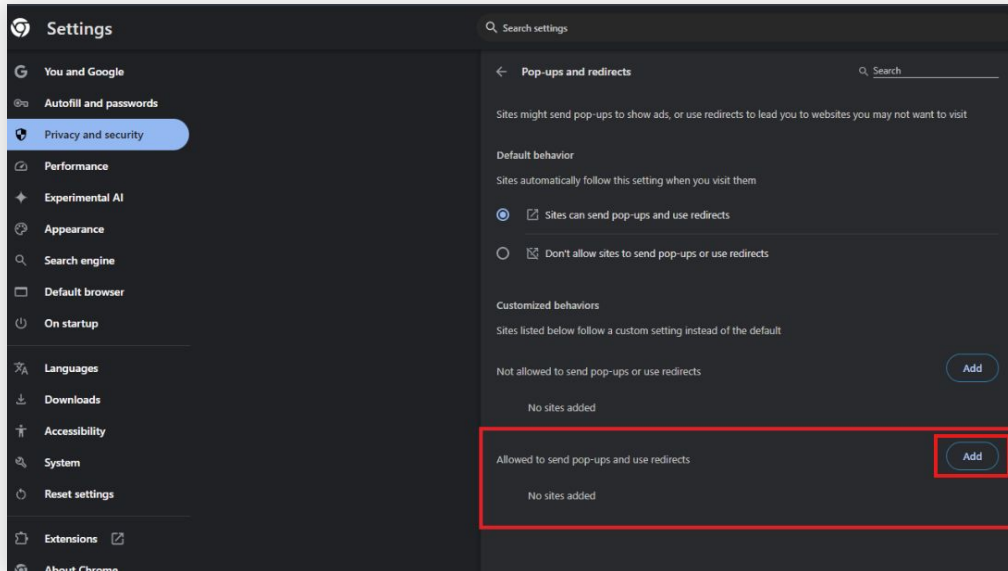


CRM IQ

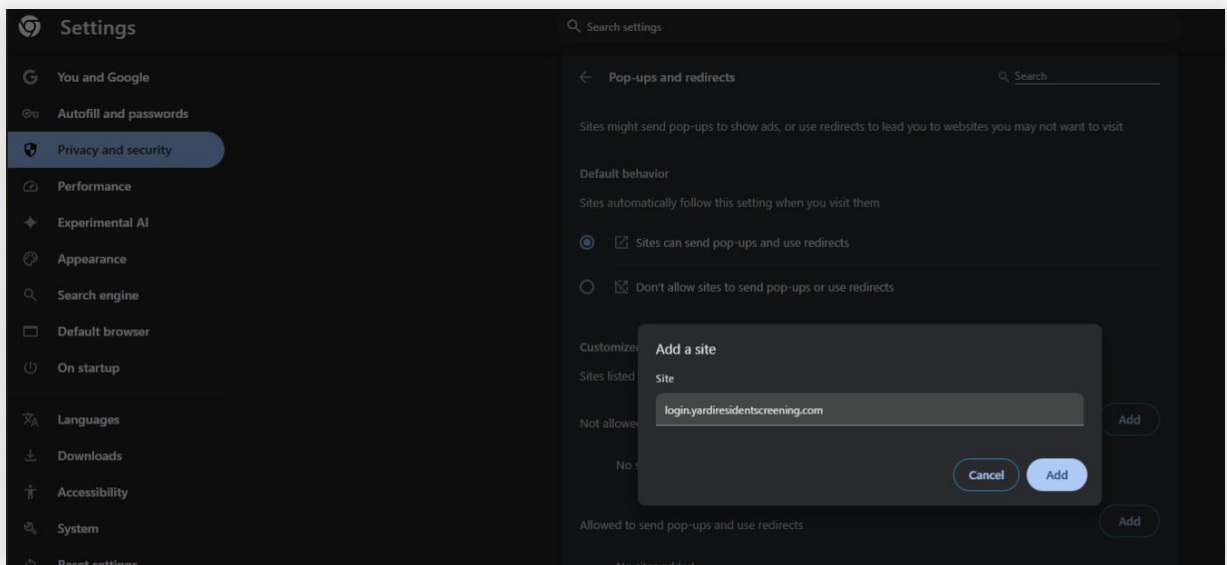
Screening Pop Up



Under Allowed to send pop-ups and use redirects click Add



Paste this link into the box and click add. Link: login.yardiresidentscreening.com



Once done exit out of it and you'll be able to review the screening.

Resident Shield Renters Insurance

Resident Shield Renters Insurance is an option set up through Yardi for the all properties but only MO, SC, and SS are required to have renter's insurance it at this time. If your property requires renters insurance it must be entered prior to posting the move-in. If not added it will not let you post the move-in. If not required residents can add on their portal after being moved in.

Electronic Signature

Congratulations!

After you (and your roommates) have completed the online electronic signature process (ySignature), the leasing staff at the property will countersign the lease and notify you when the lease has been fully executed.

Lease Document Kb rctest (Primary) ✓ Completed

[View](#) | [Download](#) | [Print](#)

Renters Insurance Requirement

Renter's insurance is required to reside at this community, and you must provide proof of insurance to the management office. You can procure renter's insurance from a provider of your choice or for your convenience you can click the Resident Shield link below to compare policy coverage and pricing options from our website. We have selected Resident Shield as our preferred provider and by purchasing your policy through them your account will be updated automatically, saving you time and effort.

If you do not provide proof of insurance from another insurance company, a liability only policy will be purchased on your behalf by Cabebe's Place. You will be charged \$600.00 per month and you can pay for the coverage in your rent payment.

Get your FREE online renters insurance quote

Start Date

If they have a 3rd party policy (and AFTER the lease has been countersigned), they can log into RentCafé – Resident Portal and then upload an image of their Insurance policy.

PAYMENTS **LEASE** **INSURANCE**

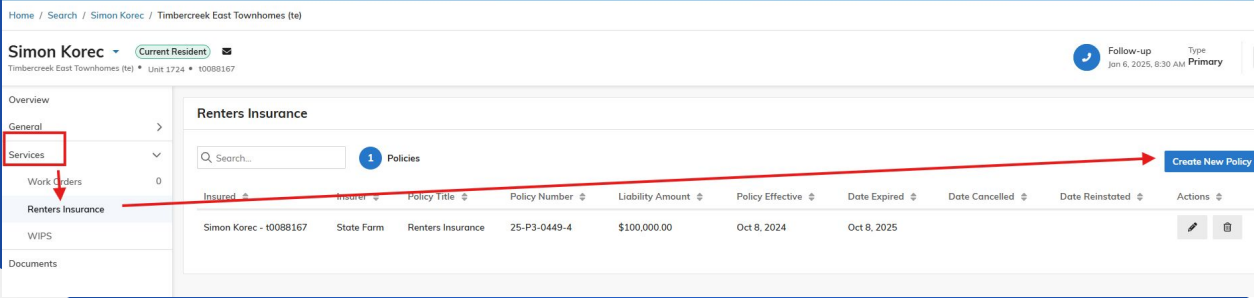
Make Payments **Contact Us**

BULLETIN BOARD

Write a message to your neighbors

Resident Shield Renters Insurance

In CRM IQ you can add insurance policy information on the residents account. Once on the account go to Services → Renters Insurance



Once clicking Create New Policy you will fill in all the required fields.

New Renters Insurance Policy Information

* indicates required fields

Name
Simon Korec - t0088167

Insurer *

Policy Title

Policy Number *

Liability Amount *

Notes

Policy Begins *

Policy Ends *

Policy Cancelled

Reinstate

☐ Renewal
☐ Satisfies Move-in Requirement
☐ Property is Interested Party
☐ Legal Liability
☐ Pet Endorsement
☐ Unlisted Additional Insured

Search...
Cancel Save



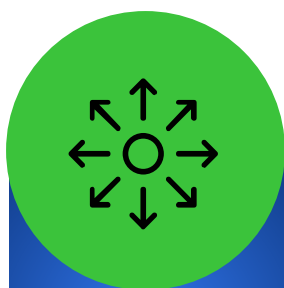
Troubleshooting Workflow

At times, you will encounter issues with the systems. We have created a Troubleshooting Workflow to help alleviate duplicate requests and user errors as well as prevent time delays in handling known issues.

Your Community Manager should be the first line of troubleshooting for any questions or issues that come up. Email your Community Manager directly to assist in resolving any questions, concerns or issues you come across using Voyager, CRM IQ or Site Manager. If your Community Manager is not able to resolve, they will reach out to their Regional Manager for support in further troubleshooting. If the issue is still not able to be resolved, the Community Manager will forward the issue to Yardi Support listing out all steps they have taken to try to resolve the issue. Yardi Support will work directly with the Community Manager to handle the issue and then the Community Manager will be responsible for training the rest of the team on what caused the issue or what is needed to prevent it from happening again.

This Workflow will assist the Community Manager become familiar and help train their team members on all questions and issues that might come up throughout the leasing process.

Troubleshooting Workflow





Yardi Support Email Template

In an attempt to expedite any Yardi Issues and to minimize the back and forth required to help troubleshoot, we have created a template to utilize when emailing an issue or request over to Yardi Support. The template below is required to be used for each request submitted. Please copy and paste it into the body of your email and fill in the responses to each bolded item with as much detail as and send your Email Request to: YardiSupport@fpacific.com.

Subject Line : should be formatted as Property Code-Unit #-Resident Name-Brief description of Issue (Ex: CB-0101-Smith-Can't log into portal) If request is Urgent, please indicate in the subject line as well.

Property

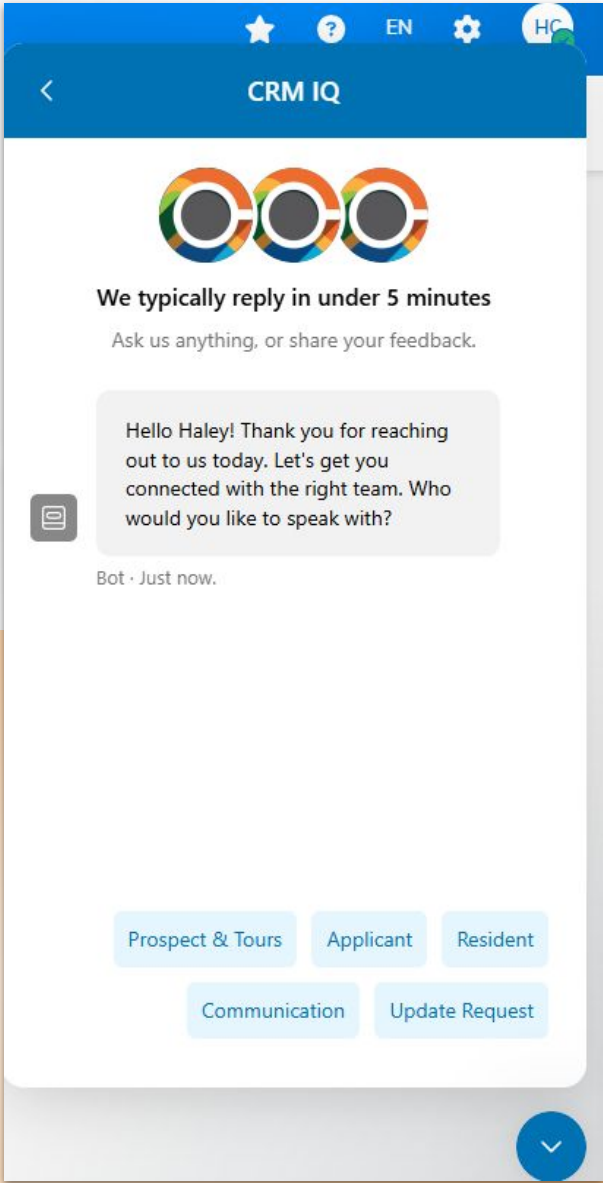
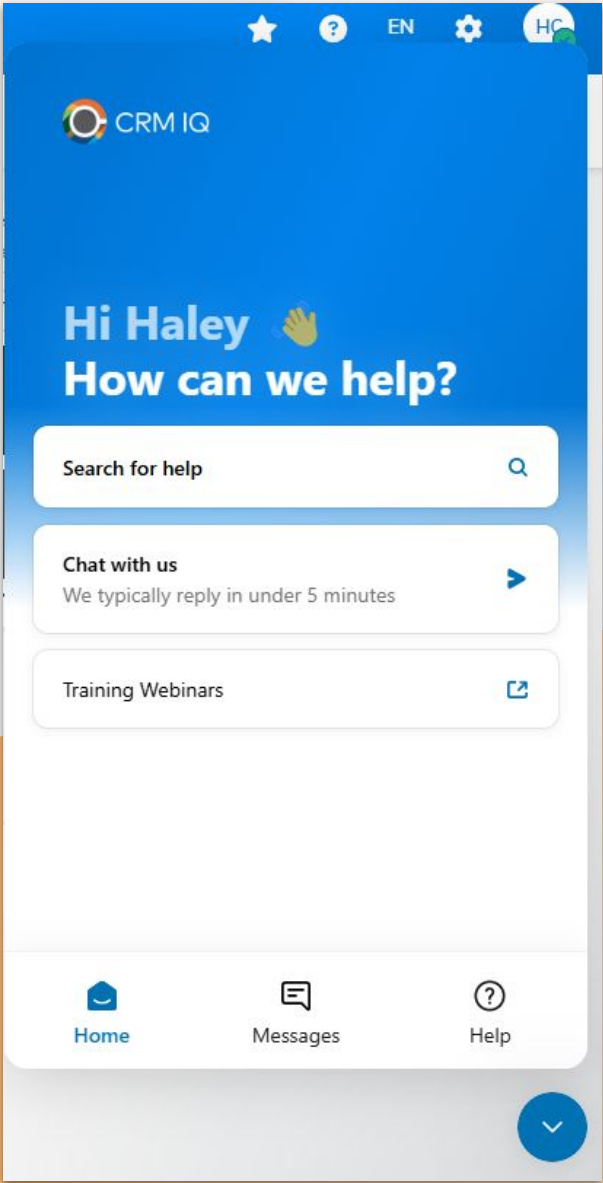
- **Unit #:** (Must be exactly as it is searched in Yardi. Do not add extra dashes or leave off building numbers. Ex: AR 39122A is not 3912-2A and EB 01-2750S is not 2750S)
- **Primary Resident / Prospect Name:**
- **Prospect / Resident Status:** (Guest, Applied, Approved, Future, Current, Notice, Past)
- **Issue:** (including steps that might have caused or lead up to the issue)
- **Have you referenced the Leasing and/or Manager Training Guides?**
- **Troubleshooting steps already attempted:** (Ex: referenced past emails for similar issue, cleared cookies/cache, reset portal password, referenced manual, discussed with manager, etc.)
- **Is this happening for any other employees re-creating issue?**
- **Is this happening for more than one resident / unit?** If so, list others.
- **Screen shots:** (Must be of entire browser window set to Original Size if in Gmail)

CRM IQ Live Agent Support



If you're having issues in CRM IQ you can first reach out to Live Agent Support within the Program. All you need to do is click the Chat button in the right hand corner of any screen you're in. Once the Window opens you will be able to chat with a Live Yardi Representative that usually replies within 5 minutes. At first you will chat with a Bot to get you to the correct department and then a live agent will join and assist. If Yardi is unable to resolve immediately submit a Yardi Support Ticket for possible resolution.

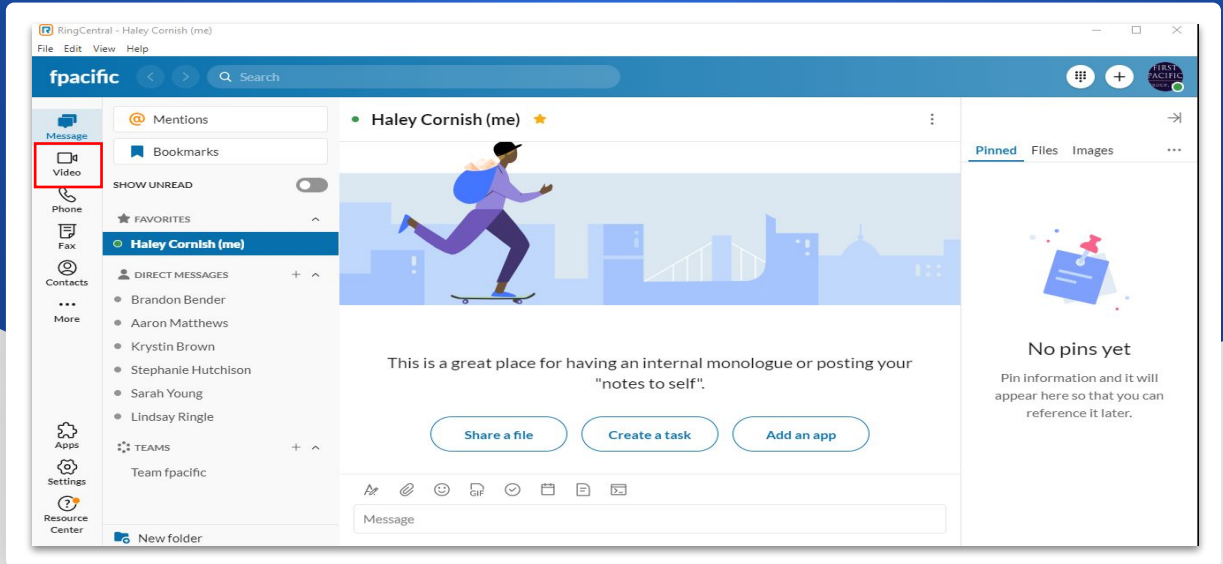
It's important to have screenshots for any issue / error message.



Ring Central

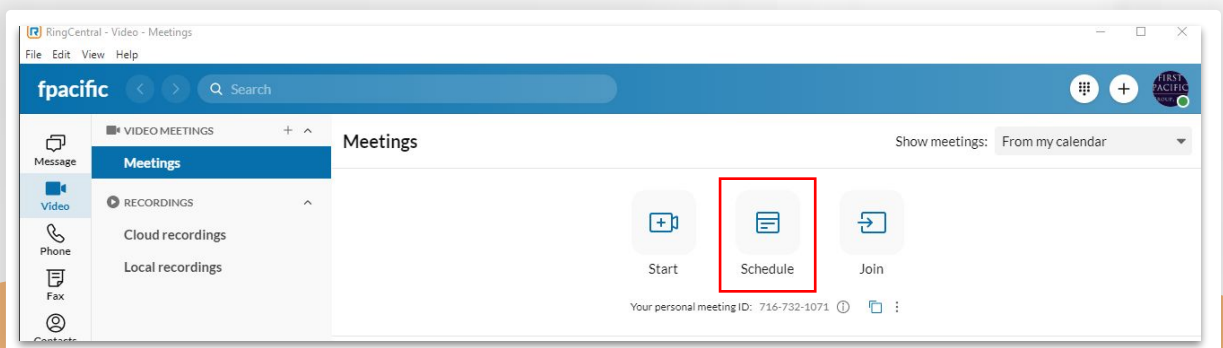


To use RingCentral first log in using your FP email and password. Once logged in your screen will look like this.



You then click Video on the left-hand corner. Once there you can Start, Schedule, or Join a call.

To Start a new meeting click Start and your meeting will instantly begin.



Ring Central



Once your meeting begins your screen will appear like this.



When click mute you can then select how you'd like to hear the audio.



Ring Central



When you select switch to phone audio this screen will appear and give you the phone number to call into, the meeting ID, and Participant ID. Make sure to always enter your participant ID.

Choose ONE of the audio conference options

Phone Call Computer Audio - Connected

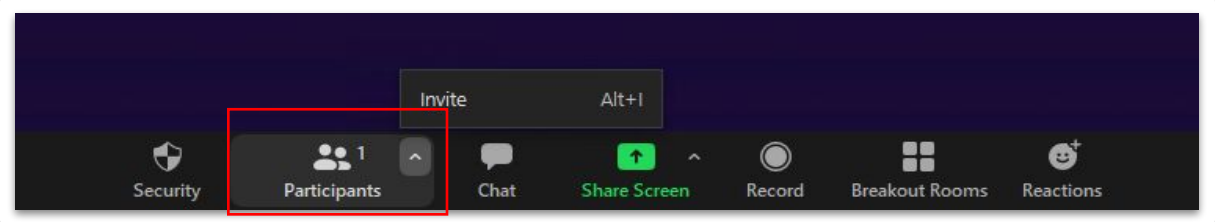
Country/Region United States of America

Dial +1 (720) 902 7700
+1 (213) 250 5700
+1 (346) 980 4201
+1 (623) 404 9000
+1 (650) 242 4929

Meeting ID 146 536 4421

Participant ID 336948

To quickly invite someone to a meeting click the arrow on participants and click invite.



A new screen will populate then click Copy Invite Link and paste it in your email to send.

Invite people to join meeting

Email

Choose your email service to send invitation

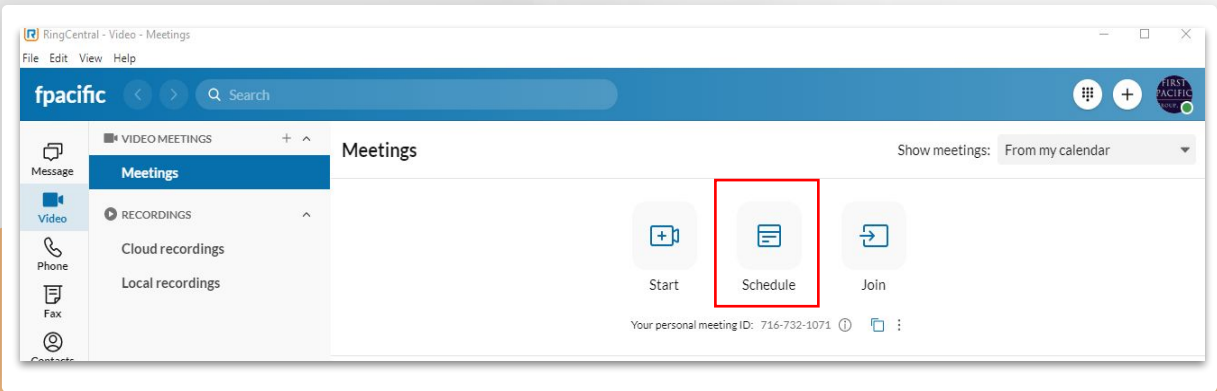
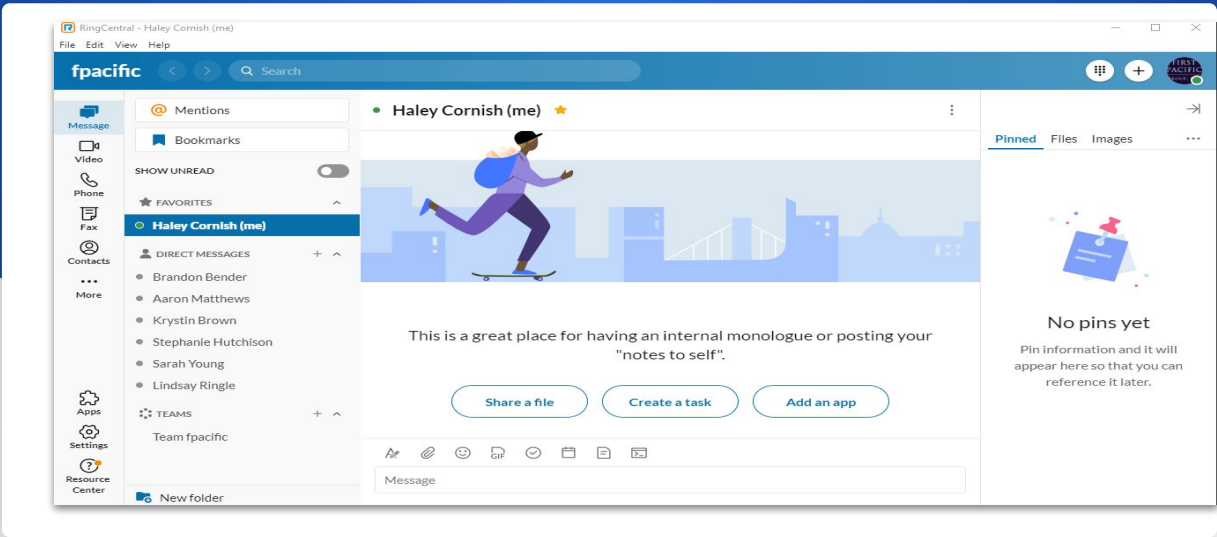
Default Email Gmail Yahoo Mail

Copy Invite Link Copy Invitation

Ring Central



To schedule a meeting, you'll click video then schedule.



Ring Central



Name your meeting then select the date, time and duration. Make sure all the boxes make the screenshot below then click schedule.

Schedule a meeting

Meeting title

Leasing Training Guide

Date

6/2/2022

Time

10:00 AM

Duration

1 hr 00 min

Time zone

(UTC-06:00) ...

Recurring meeting

Schedule using ⓘ

Meeting info

Meeting settings

Use Personal Meeting ID 716-732-1071

Require password

Alphanumeric only

Participants can only join after me

Open waiting room

Advanced settings ▲

Turn off camera for participants

Turn off camera for host when joining meeting

Mute participants on entry

Only signed-in users can join

Record meeting automatically

Off

Select meeting audio for participants ⓘ

Telephone and Internet ...

Select dial-in numbers

United States

Add all (58) Clear

Cancel

Schedule

Ring Central



A new screen will populate then you'll click Copy Invitation.

Your meeting has been scheduled

Meeting invitation

Hi there,

Haley Cornish is inviting you to a scheduled RingCentral meeting.

Topic: Leasing Training Guide
Time: Jun 2, 2022 10:00 AM Central Time (US and Canada)

Join from PC, Mac, Linux, iOS or Android: <https://meetings.ringcentral.com/j/1454835720>
For the best audio experience, please use computer audio.

Or iPhone one-tap :
US: +1(312)2630281,,1454835720#
+1(470)8692200,,1454835720# (US East)
+1(646)3573664,,1454835720#
+1(773)2319226,,1454835720# (US North)
+1(213)2505700,,1454835720#

[Close](#) [Download .ics](#) [Copy invitation](#)

Leasing Training Guide

Event Out of office Task Reminder

Wednesday, June 8 – Wednesday, June 8
Does not repeat [Add time](#)

[Find a time](#)

[Add guests](#)

[Add Google Meet video conferencing](#)

[Add location](#)

Hi there,

Haley Cornish is inviting you to a scheduled RingCentral meeting.

Topic: Leasing Training Guide
Time: Jun 2, 2022 10:00 AM Central Time (US and Canada)

Join from PC, Mac, Linux, iOS or Android:
<https://meetings.ringcentral.com/j/1454835720>
For the best audio experience, please use computer audio.

Or iPhone one-tap :
US: +1(312)2630281,,1454835720#
+1(470)8692200,,1454835720# (US East)
+1(646)3573664,,1454835720#
+1(773)2319226,,1454835720# (US North)
+1(213)2505700,,1454835720#
+1(346)9804201,,1454835720#
+1(469)4450100,,1454835720# (US South)
+1(623)4049000,,1454835720# (US West)

[More options](#) [Save](#)

You then go to your Google Calendar click the date your meeting is scheduled for and create an event for it. Add the time and guest. Once you click save it will send the invite to all guest with the meeting info.

Google Drive How-To's



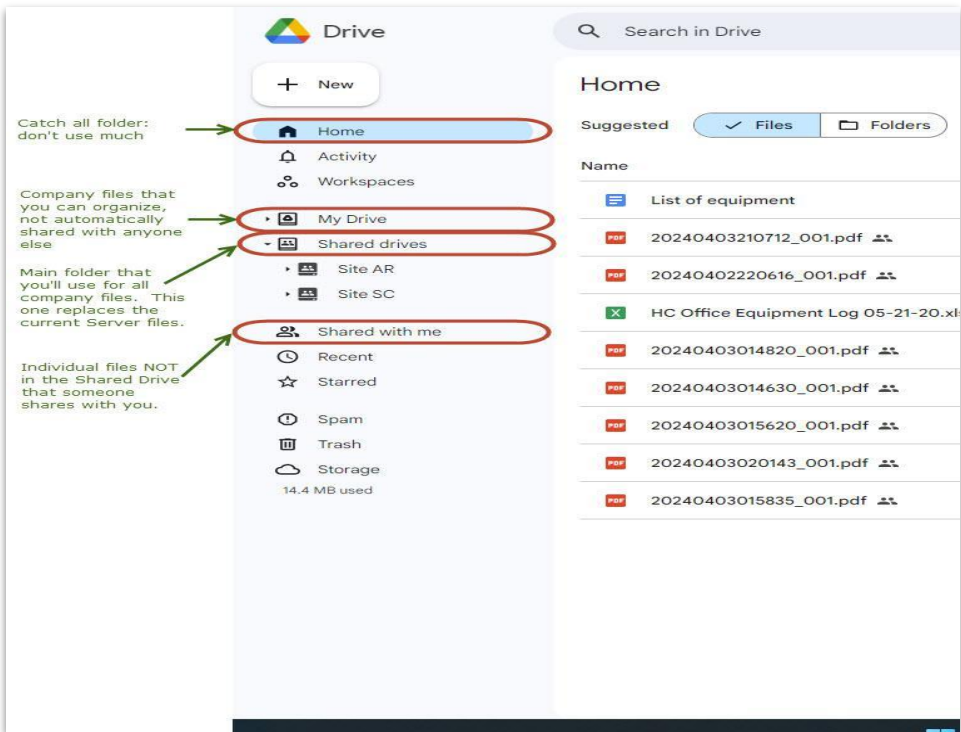
Google Drive Folders

-Home shows you files that Drive thinks you'll want to use. This is based on various criteria like when you edit them, open them, uploaded them, when they were shared with you, or documents attached to upcoming Calendar events. You can generally ignore this folder.

-My Drive contains files and folders that you created outside of the Shared drive and you control access to. You are able to share access and permissions to these files and only the files you share from your My Drive will be accessible to others. To share files located in My Drive, right click on the file...

-Shared Drive is the primary folder in Google Drive that First Pacific uses to store and collaborate on files. Unlike in My Drive, Shared Drive and its contents are managed by the company, though employees have access to their property's files. Permission for these files include view only or write permissions. Within a single folder you may only have view access for a top level folder but then have write access as you drill down the folder hierarchy. Please notify your manager if you're unable to access a file you believe you should have access to. Once you are a member of a Shared Drive, the drive will appear below your "My Drive" and above "Shared with me" in your Google Drive in the sidebar.

-Shared with me is very different from Shared Drive. Shared with me generally are files that you only have access to because an individual shared them with you. The owner of those files has full control and can revoke access at any point. When someone shares a file from their "My Drive", it goes into the "Shared with me" section for whoever they are sharing with. You can create a shortcut of a file in Shared with me and move the shortcut to your My Drive or just leave it in Shared with me. Files in your Shared Drive will NOT also show up Shared with me.



Google Drive How-To's



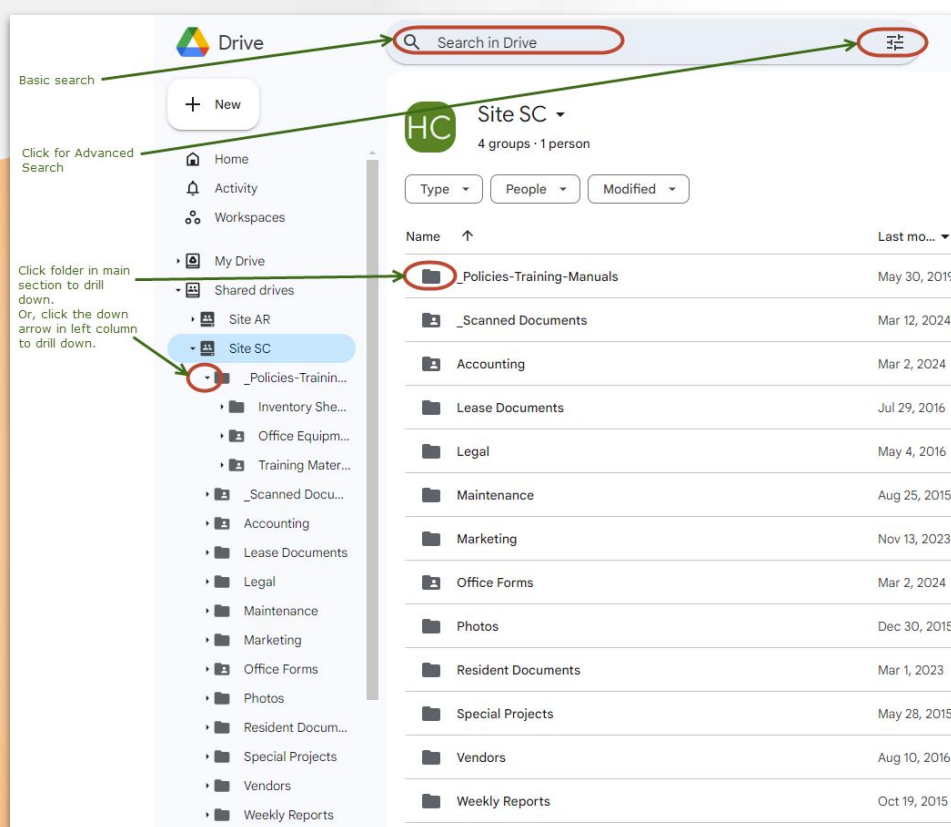
Google Drive File Collaboration /

Google Drive File Collaboration

- All file changes are automatically saved in real time so no need to save as you go. However, when editing PDF files (in the Web version) you need to click “save”.
- Permissions for a file can be edit, comment, or view so you can do certain things based on your permission.
- With Google Drive, version control isn't a problem. Generally, no more need for saving multiple versions of a file, except when doing so for specific reasons.
- Collaborating on a file now is a breeze. All of your coworkers can work on the same document, at the same time. You can always see in the upper right corner if someone else is working on the file.

Finding Files

- Google is known for its search engine so the easiest way to find a file is just to type the name of the file in the search bar, or any word in the name. If you want a more refined search, click the Advanced Search icon on the right side of the search bar. This lets you search within a specific folder or using other specific criteria.
- Or, you can search manually by clicking through the folder hierarchy. You can see the folder structure in the left panel and in the main body.
- You can see the full breadcrumb list on the left by clicking the down arrows or double clicking the folder name to expand/collapse each folder. Note that individual files never show on the left panel, only in the main body.
- The breadcrumb list at the top of the main body only shows 2 or 3 folders so you need to click the horizontal ellipses to see the full path.





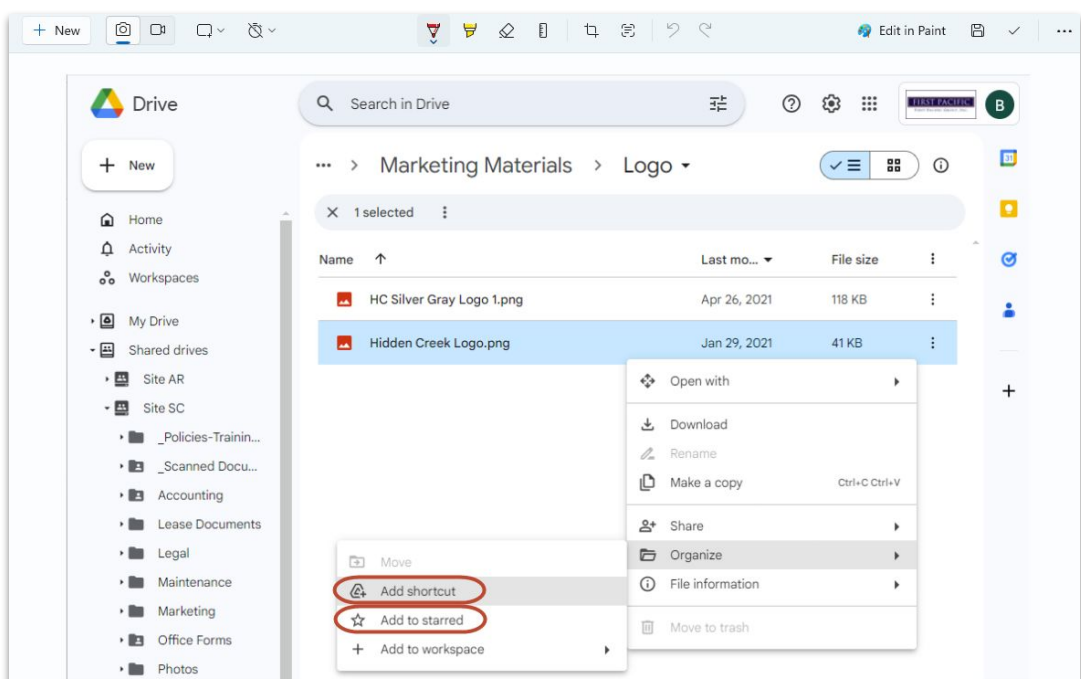
Organizing Shared Drive Files for easier access

Organizing Shared Drive files for easier access

•You cannot move a file or folder out of Shared Drive into My Drive so to put something into another location outside of Shared Drive you need to create a shortcut to the original file. Right click on a file, select organize, select add shortcut, then select where you want the shortcut to go. Importantly, if you delete a shortcut it does NOT delete the original file. Also, you'll get a message that moving a file from one folder to another will lose the original permissioning and take on the permissioning of the destination folder.

•Starred: Helpful for starring favorite files/folders for easier access. You can't create your own folder structure like in My Drive so this is just a flat list of favorites. This simply saves a link to the original file itself. To remove an item from your starred list, right click the item, click organize, then click remove from starred. This only removes it from your starred list, it doesn't delete the original file.

•My Drive: Helpful for creating a file hierarchy for documents that are not shared with the team. For example, storing files/folders from the Shared Drive that you want easier access to. Remember that only shortcuts to Shared Drive files/folders can be placed here, not the original files/folders themselves.





Download Report From Yardi and Open/Save in Google Drive

- Download report from Yardi and save into Download folder on computer (or any location you choose to put it).
- If you want to save in the Shared Folder in Google Drive, navigate to the destination folder in Google Drive. In upper left corner click the “+ New” button, select “file upload”, navigate to wherever you saved the file and double click the file.
- If you only want to open the file and NOT save it in the Shared Folder, follow the same steps as above but navigate/upload to your My Drive folder instead of the Shared Drive folder as the destination.

Create a New Version (Copy) of a Google Document/Spreadsheet

- Right click on the file you want to save as a new version. Or click on the ellipses to the right of the file name. Select, “Make a copy”. Rename the copied file.
- Note: Make sure to create the new copy BEFORE you make any changes to the file since all changes are automatically saved in real time.

Share a Google Drive Document

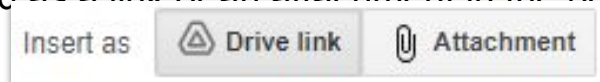
- Right click the document, or click the vertical ellipses next to the document.
- Click “Share”
- Type the email of the person you’re sharing with. Assign viewer/commenter/editor permissions.
- Click Done.
- Be very cautious when sharing documents outside of First Pacific and only share with trusted parties.
- Sharing a document with someone outside of First Pacific only gives access to that document and no others in the folder.



Email a Google Drive Document

- Create a new email in Gmail
- At the bottom of the email click the icon 
- Select whether you want to send as a link or an attachment in the bottom

right corner of the page



- It's recommended to first share/permission the document with the recipient in Google Drive before sending a Google Drive link.

Manage PDF's in Google Drive

- You must have an Adobe Acrobat license before being able to manage/edit PDF's in Google Drive. Contact your manager if you need a license.
- Once you have an Adobe Acrobat license, you need to connect your license to your Google Drive account by following the steps below:
 - Open Google Drive and click My Drive (the one right beneath the search bar)
 - Click More
 - Click Connect more apps
 - Click Search apps and type Adobe Acrobat
 - Click Adobe Acrobat and then Install
 - Click Continue and sign in with your Google account
 - Scroll down and click Continue
 - Click OK
 - You'll know it worked when you go to any pdf in Google Drive, right click on it, click "open with", and you should see Adobe Acrobat listed as one of the options.

Google Drive How-To's



Google Drive Tips/Tricks

- All documents/spreadsheets are collaborative, meaning multiple people can work on the same document/spreadsheet at the same time.
- You can see if someone else is in the document/spreadsheet by looking for a small thumbnail image in the upper right corner of the page.
- Remember to close documents when you're done working on them to avoid having lots of documents/tabs open at the same time.
- If your internet speed seems slow and lagging, try running an internet speed test using this link:
<https://fiber.google.com/speedtest/>.
- If you are creating a new version of a document, make sure to "create a copy" before you make any changes to the document.
- If you need assistance with anything related to Google Drive, please contact Adam at ameyers@fpacific.com or create a tech ticket.

**Please contact Haley Cornish
at anytime if something
should be added or changed.
hcornish@fpacific.com**