



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

NOV

BIRTHDAYS

BRUCE CARLSON	11/12
NICHOLAS DEEMS	11/13
JAMIE YOUNG	11/13
STEPHEN GROTH	11/15
JAVI GONZALEZ	11/21
SARAH YOUNG	11/23
OLIVIA CASTLE	11/28

ANNIVERSARIES

EMPLOYEE OF THE MONTH

FRANCISCO CORNEJO

CONGRATULATIONS!

FRANCISCO HAS BEEN A DESIGNATED TEAM MEMBER FOR OVER 2 YEARS. HIS ABILITY TO ADAPT AND LEARN IS AMAZING. HE ALWAYS GOES THE EXTRA MILE, INCLUDING HELPING LEADERS OUT ALL NIGHT INTO THE MORNING WHILE WORKING. FRANCISCO FOLLOWS THE CORE VALUES OF SERVICE AND TEAM BY ALWAYS PROVIDING THE BEST SERVICE TO OUR RESIDENTS AND SHOWING WHATEVER IT TAKES TO SUPPORT HIS TEAM. WE ARE SO HAPPY FOR FRANCISCO AND ALL HE DOES.

WELCOME PFG TEAM MEMBERS

WELCOME TO OUR TEAM!

YardiOne | Email | RingCentral

PeopleHub | TANDEM HR | TANDEM HR | tcp

Employee Self-Service | Manager Self-Service | Manager Self-Service | MobileClock Get Up | MobileClock Get Up | MobileClock Get Up

Yardi Support | Tech Support | Marketing | Property Address | Policy Changes | Management

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.



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:



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!**

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.**

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

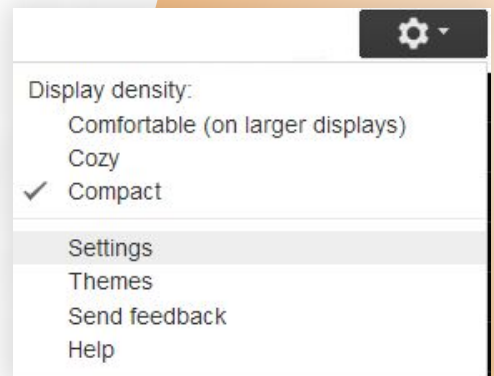
You have received your @fpacific.com email account. To log into it, you must go to www.gmail.com. Remember to change your password upon logging in.

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



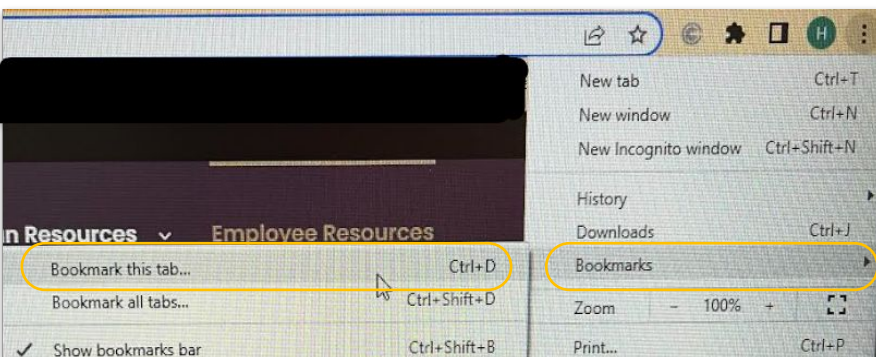
- Email responses for prospects should always be replied back the same day, as soon as possible to make sure we capture this hot lead.
- Begin the email with a “Hi”, or a “Good Morning” and the person’s name.
- All emails should have your signature.
- You should not email any resident, applicants, or 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

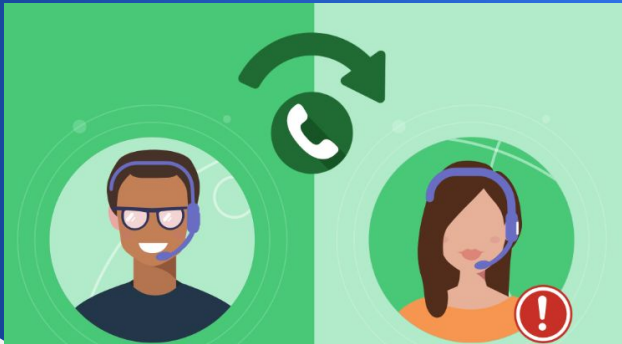
If an employee scores 75% or lower on any call after the initial training, it is the manager's responsibility to provide additional follow up and support to correct performance

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.

Step #1

Step #2

Step #3

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.

The grid contains the following icons:

- Yardi ONE: Yardi One logo
- Email: M logo
- RingCentral: RingCentral logo
- Employee Midwest HR Login: PeopleHub TANDEM HR logo
- Manager HR Login: TANDEM HR logo
- Hiring Prism HR: TANDEM HR logo
- Time Clock FPG: tcp logo
- Employee Old Midwest HR Login: MidwestHR logo
- Manager Old HR Login: MidwestHR logo
- MobileClock Set Up: TCP MobileClock App Set Up
- Yardi Support: YARDI SUPPORT logo
- Tech Support: TECH SUPPORT logo
- Marketing Center: MARKETING logo
- Property Address List: PROPERTIES logo
- Policy Changes: POLICY CHANGES logo
- FPG Org Chart: ORG CHART logo
- Careers: CAREERS logo
- Employee Directory: DIRECTORY logo
- Benefits - Aetna: aetna logo
- FCO: FCO logo (Air Collection & Outsourcing, Inc.)
- Uniforms FG Uniforms: FG Uniforms logo
- Craigslist Login: craigslist logo
- FedEx: FedEx logo
- USPS: UNITED STATES POSTAL SERVICE logo

First Pacific University

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.

The screenshot displays the user dashboard for Haley Cornish. At the top, there is a navigation bar with 'DASHBOARD MY TRAINING CATALOG' and a search bar. The user's name and '7 Badges' are shown. A red notification bar indicates '2 items need your attention'. The 'CONTINUE LEARNING' section shows two courses: 'AO 395 - 1099 Process in Voyager 75' at 0% and 'PD 120 - Time Management Module 1: What are the Benefits?' at 37%. Below this, there are two large cards: 'ANNOUNCEMENTS' with a count of 0 and 'ASSIGNMENTS' with a count of 72. A calendar for December 2024 is visible on the right, and a 'RESOURCE' section is partially shown at the bottom.

02

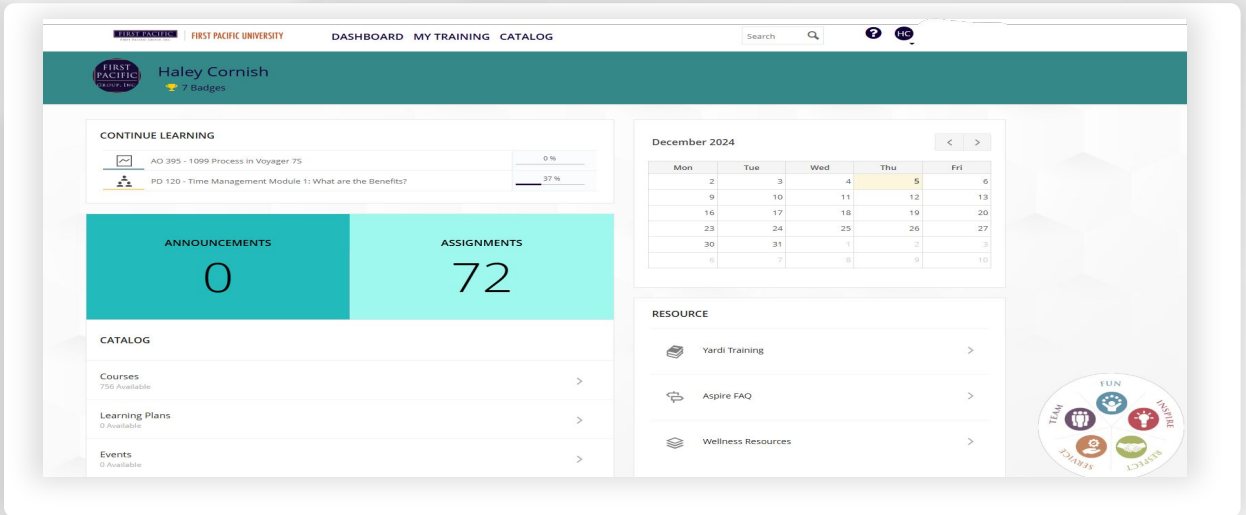
In the upper right-hand corner if you hover over your Initials, you can click My Profile to update your personal information including uploading a profile photo or click Transcript for a list of courses completed for a period of time.

03

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

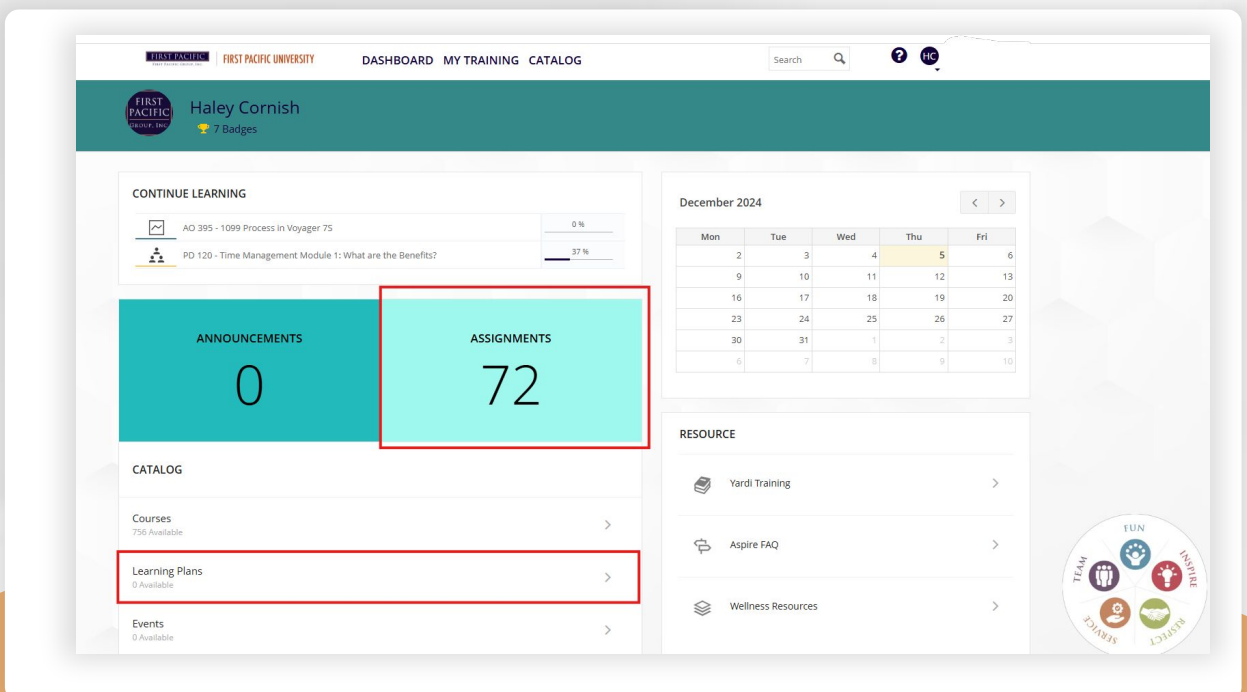
First Pacific University

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.

Learning Plan Details

eLearning Implementation

The courses in this Learning Plan teach eLearning administrators how to navigate the university and perform day-to-day activities as well as initial setup items.

Getting Started

eL 100 - Welcome to eLearning	Completed	▼
eL 150 - eLearning Scavenger Hunt	Completed	▼

Basic Admin Functions

eL 200 - eLearning Authoring Tools	Get Started	▶
eL 205 - eLearning Questions and Assessments	Get Started	▶
eL 210 - eLearning Course Settings and Behaviors	Get Started	▶
eL 215 - Authoring Tools: Course Builder	Get Started	▶
eL Templates	Get Started	▶
eL 225 - eLearning Supervisor Tools	31% CONTINUE	▶
eL 230 - eLearning Validations	Get Started	▶

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.

23 items need your attention

CONTINUE LEARNING

RCCQ 110 - Managing the RentCafe CRM Flex Queue 13%

ANNOUNCEMENTS 0

ASSIGNMENTS 17

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

RESOURCE



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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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>	
<input type="checkbox"/> N/A <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> N/A <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> N/A <input type="checkbox"/> Yes <input type="checkbox"/> 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	<input type="checkbox"/> N/A <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes (0) <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> N/A <input type="checkbox"/> Yes <input type="checkbox"/> 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?"	<input type="checkbox"/> N/A <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If no, comment required.</i>	
How many times did the Leasing Professional attempt to close?	<input type="checkbox"/> Once <input type="checkbox"/> Twice <input type="checkbox"/> Three Times <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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.	
<i>Please provide a 2 paragraph description of your visit from beginning to end.</i>	
Special Data	
Person Shopped	
<i>Enter the name of the Leasing Professional.</i>	
EID	
Shopper's First and Last Name.	
INTERIOR ASSESSMENT	
<i>Sample Comment Text (Click to enter comment text)</i>	
Was the management office clean and organized?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Was the apartment or model shown neat and clean?	<input type="checkbox"/> Yes <input type="checkbox"/> 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%

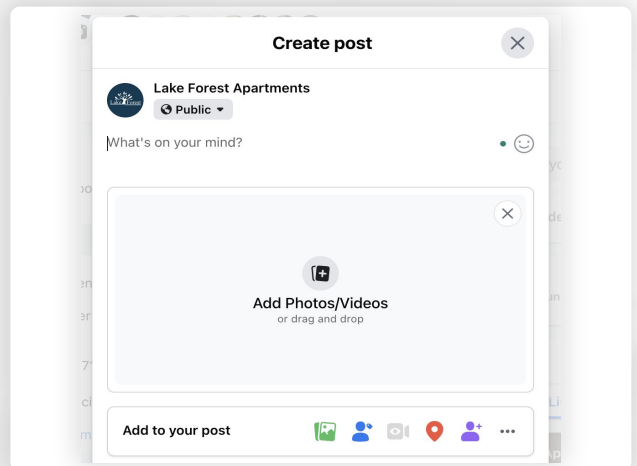
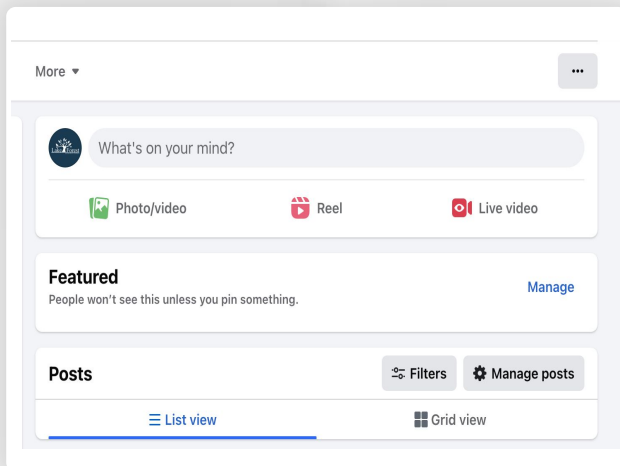
Posting On Facebook



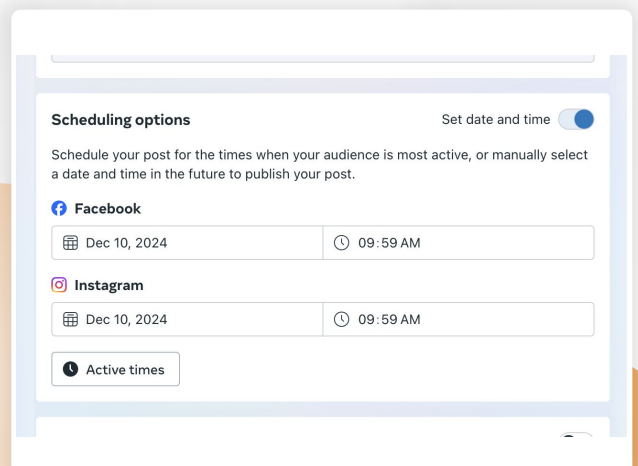
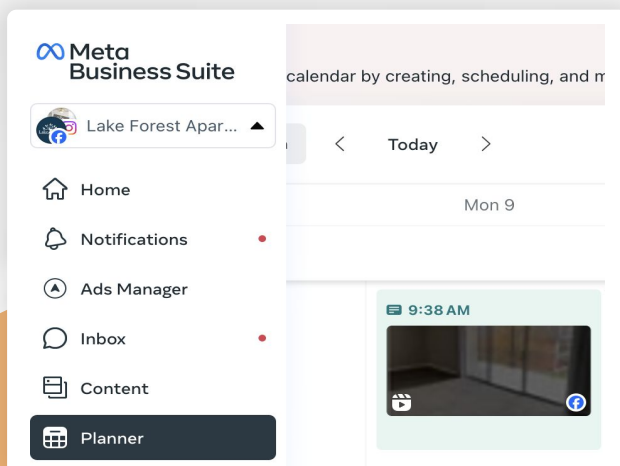
Watch this

<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.

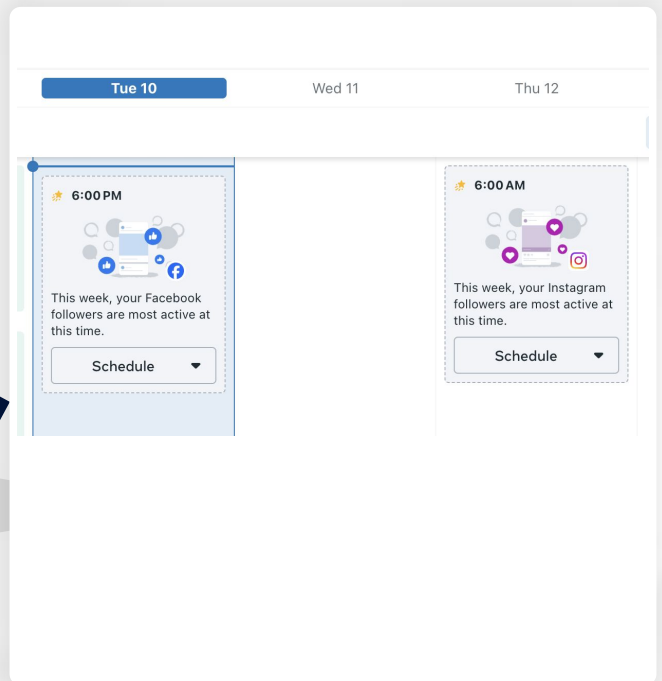


4. To schedule a post, Go to Meta Business Suite and select 'Planner'.
5. Option to schedule, backdate, or save a draft of your post. click "Create Post" in the upper left corner.
5. After creating your post, scroll down and click on the scheduling options. Select the date and time you want it to be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

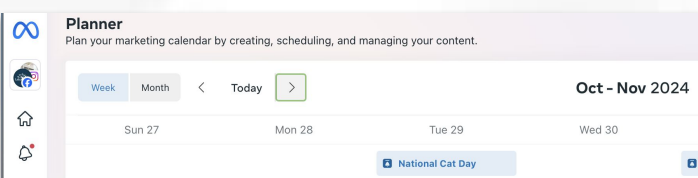
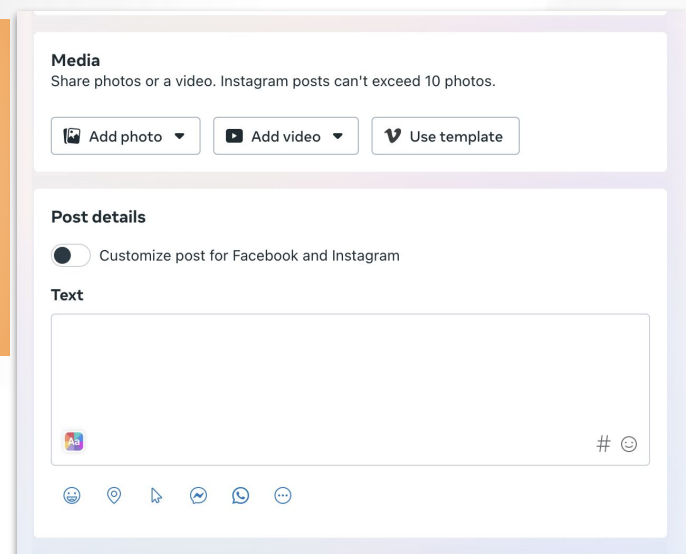




Posting On Facebook



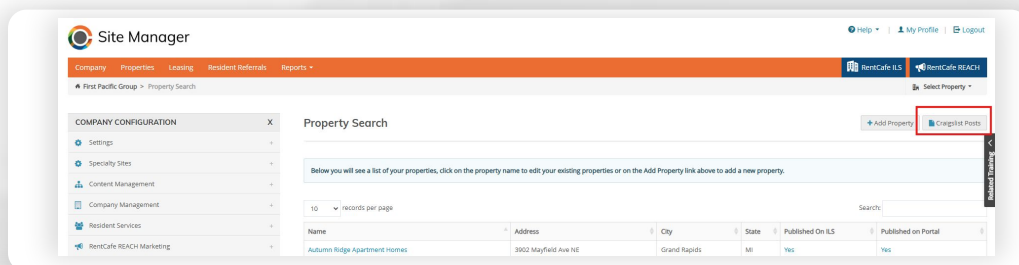
To view or edit your scheduled posts, go to the Planner in Meta Business Suite. There, you can see when your audience is most active and review insights from your previous posts.



Rent Café Site Manager

Posting on Craigslist Classifieds

Open Site Manager and click Craigslist Posts



Craigslist Posting Tool

Choose Property:

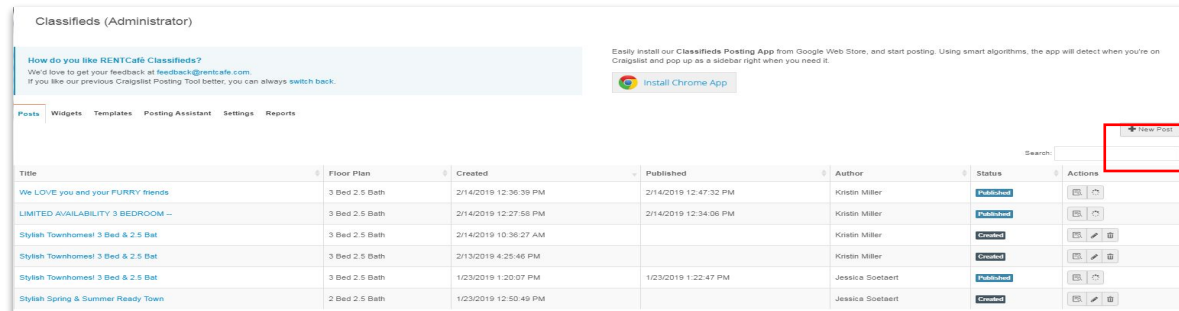
Select property...

Select property...

- Autumn Ridge Apartment Homes
- Cedar Brooke Apartments
- Cedar Ridge Apartments & Townhomes
- Estates at Brentwood Lake
- Hidden Creek Apartments
- Lake Forest Apartment Homes
- Orchard of Landen
- San Lorenzo Apartments
- Sheridan Square Apartments
- The Orchards at Four Mile
- The Sands
- Timbercreek East Townhomes
- Vista Del Sol Apartments

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

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



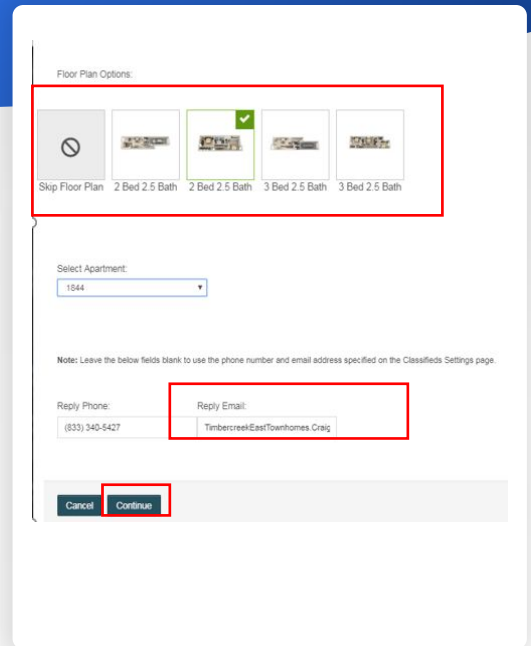
Rent Café Site Manager

Posting on Craigslist Classifieds

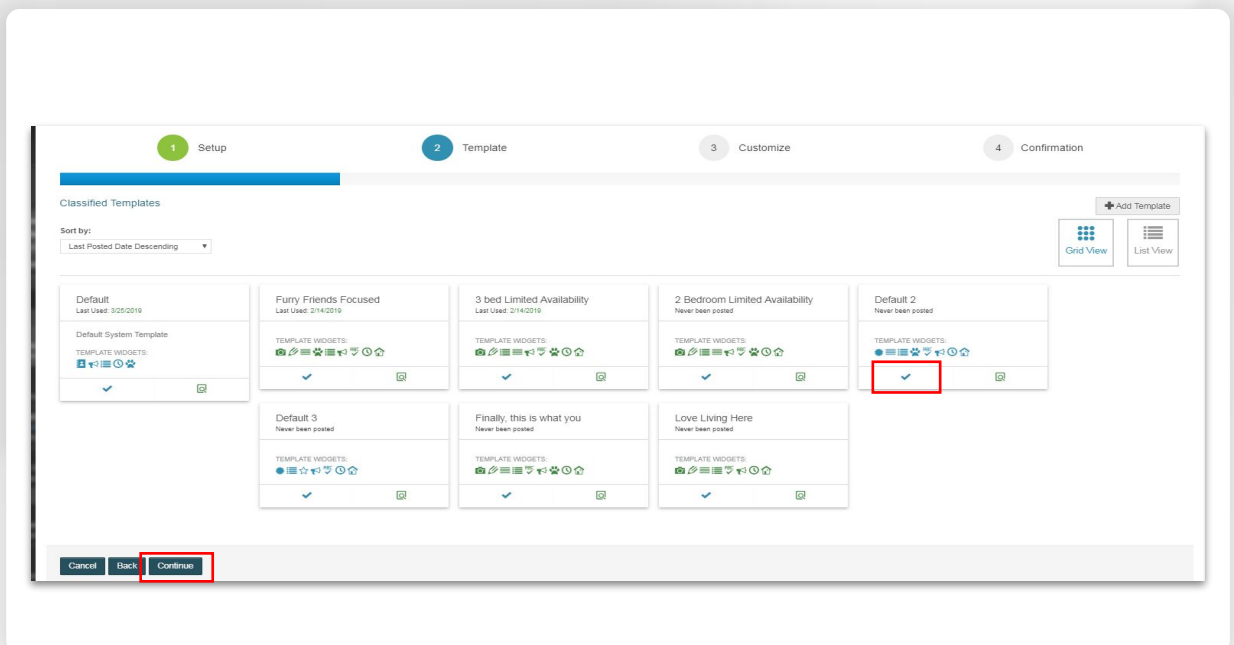
On the Setup screen, you will click on the Floor Plan you are trying to advertise. Once you select a specific floor plan, you will click the Skip Floor Plan icon.

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.



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.

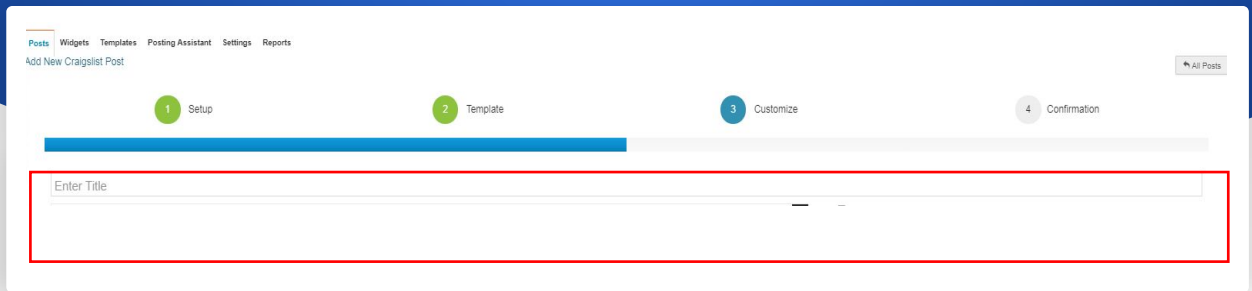


Rent Café Site Manager

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.



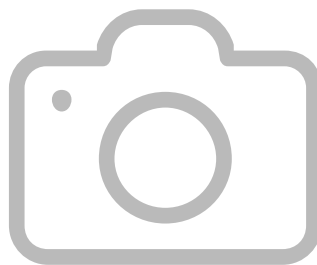
Posts | Widgets | Templates | Posting Assistant | Settings | Reports

Add New Craigslist Post All Posts

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**.

Love Where You Live!	
Find the perfect floor plan that fits your lifestyle!	
Description	<input checked="" type="checkbox"/>
Amenities	<input checked="" type="checkbox"/>
Pet Policy	<input checked="" type="checkbox"/>
Custom Text	<input checked="" type="checkbox"/>
Call To Action	<input checked="" type="checkbox"/>
Office Hours	<input checked="" type="checkbox"/>
Equal Housing	<input checked="" type="checkbox"/>

Cancel Back **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

Click to add photos

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]

RENTCafé® CLASSIFIEDS

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

Please select desired location.

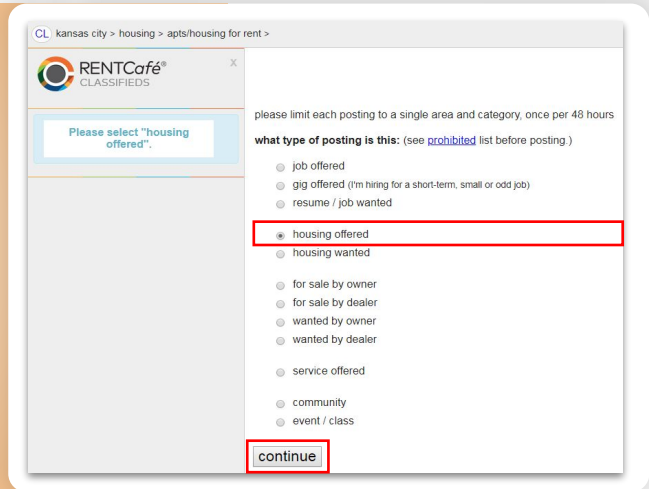
which city / area would you like to post to?
kansas city, MO

continue

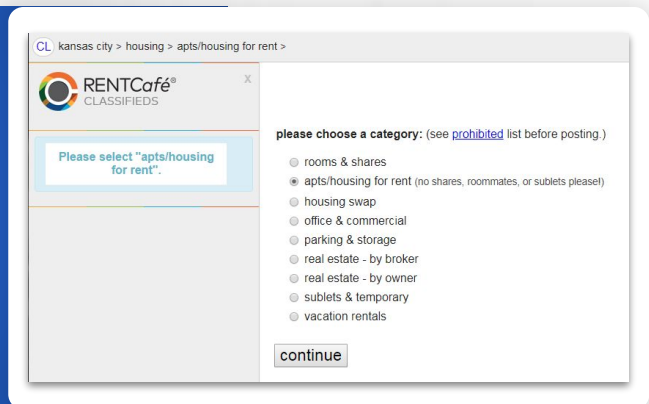
Rent Café Site Manager

Posting on Craigslist Classifieds

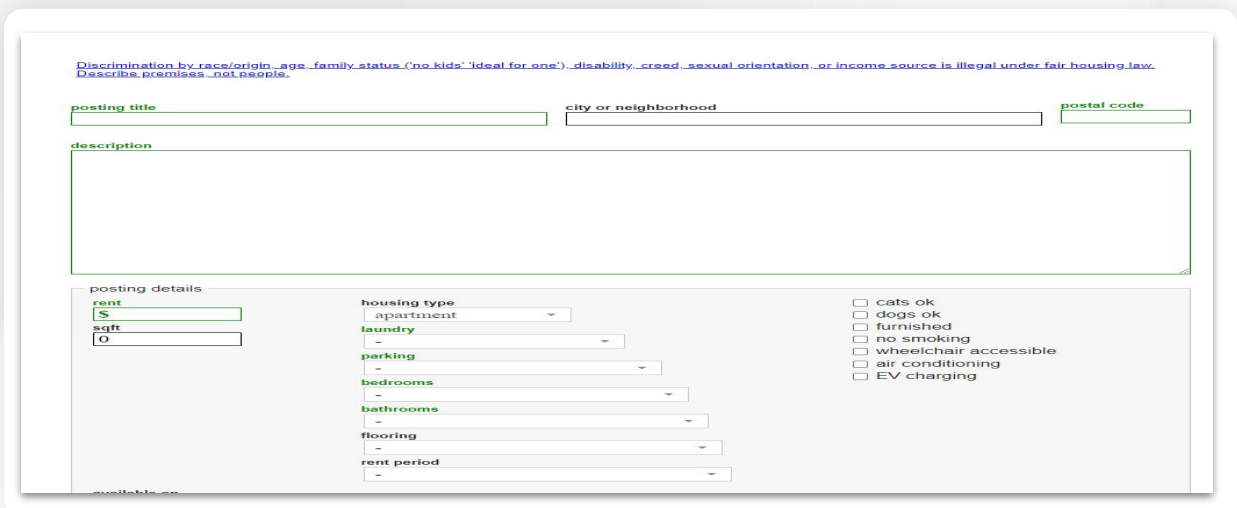
Click the **Housing Offered** button and then click **Continue**.



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



Your AD will be blank and will need to be

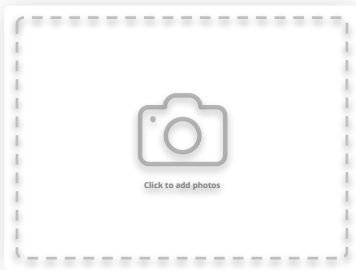


Rent Café Site Manager

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	city or neighborhood	postal code
We can't wait for you to call this 1 bedroom your ho		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 <input type="text" value="\$ 995"/>	housing type <input type="text" value="apartment"/>	<input checked="" type="checkbox"/> cats ok	available on <input type="text" value="select date"/>
sqft <input type="text" value="1245"/>	laundry <input type="text" value="-"/>	<input checked="" type="checkbox"/> dogs ok	open house dates <input type="text" value="-"/> <input type="text" value="-"/> <input type="text" value="-"/>
parking <input type="text" value="-"/>	bedrooms <input type="text" value="0"/>	<input type="checkbox"/> furnished	
bathrooms <input type="text" value="-"/>		<input type="checkbox"/> no smoking	
		<input type="checkbox"/> wheelchair accessible	

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 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 cross street city

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.

ASSIGNMENT: You represent and warrant that you own the copyright in any text, photos, or other content (the "Content") you submit to craigslist in making this posting. You irrevocably assign to craigslist, free and clear of any restrictions or encumbrances, all right, title and interest in and to the Content, including without limitation the copyright therein. Entering your name and clicking "continue" below constitutes a signed writing assigning such copyright to craigslist.

LICENSE: craigslist, in turn, grants you a non-exclusive, perpetual, irrevocable, worldwide, fully paid/sublicensable license to reproduce, make derivative works from, distribute, and/or publicly display the Content, in any medium, whether now known or hereafter devised.

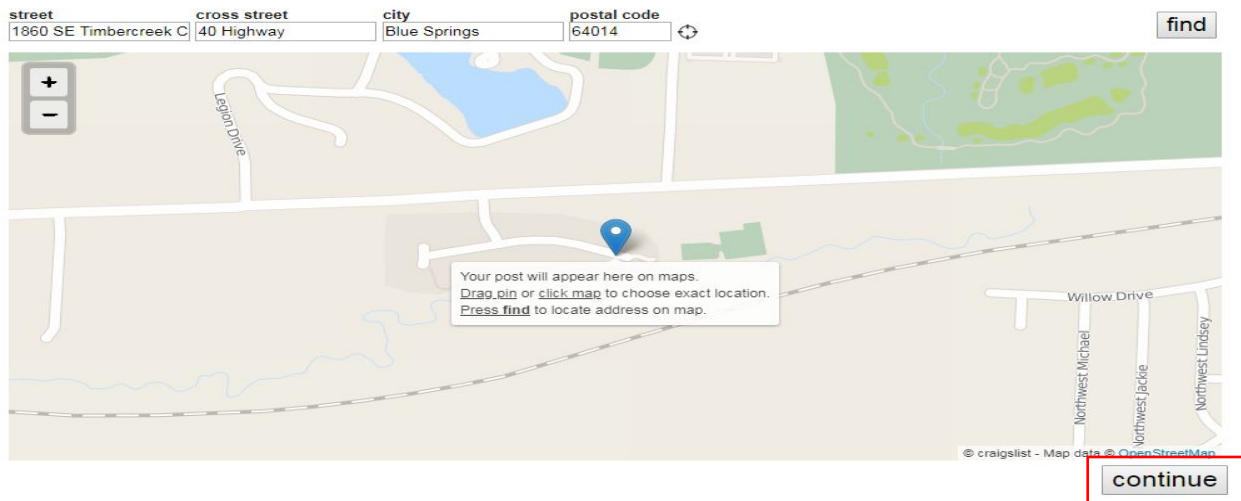
your name country of residence

Rent Café Site Manager

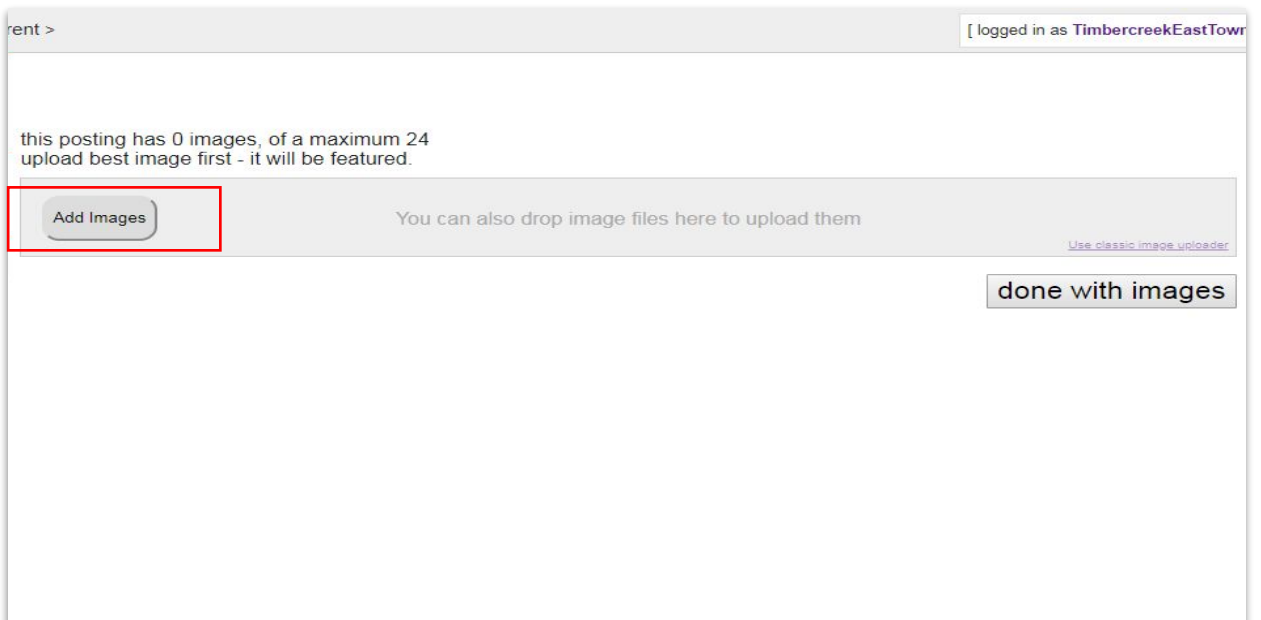
Posting on Craigslist Classifieds

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**.



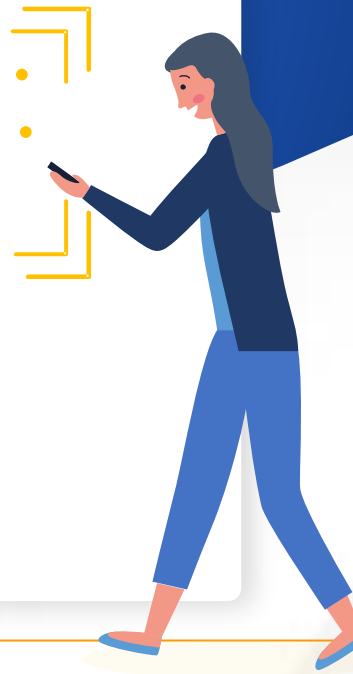
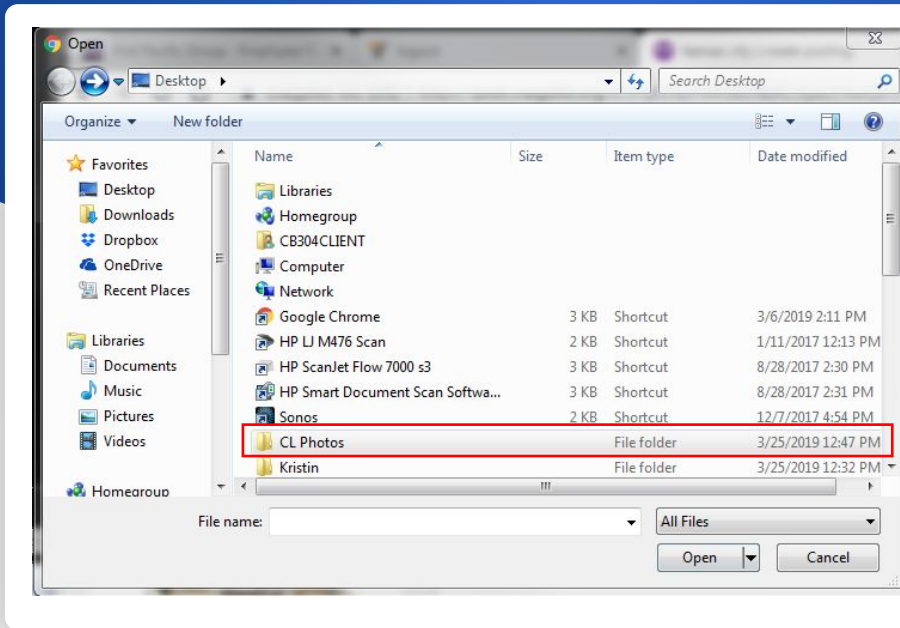
The next step is to download the Images from a designated area in your folder. Click on the add images.



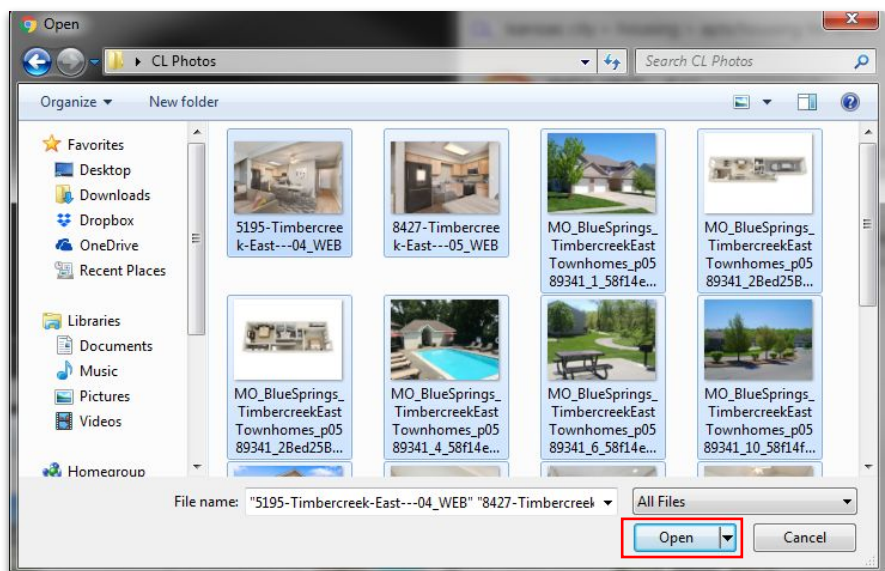
Rent Café Site Manager

Posting on Craigslist Classifieds

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



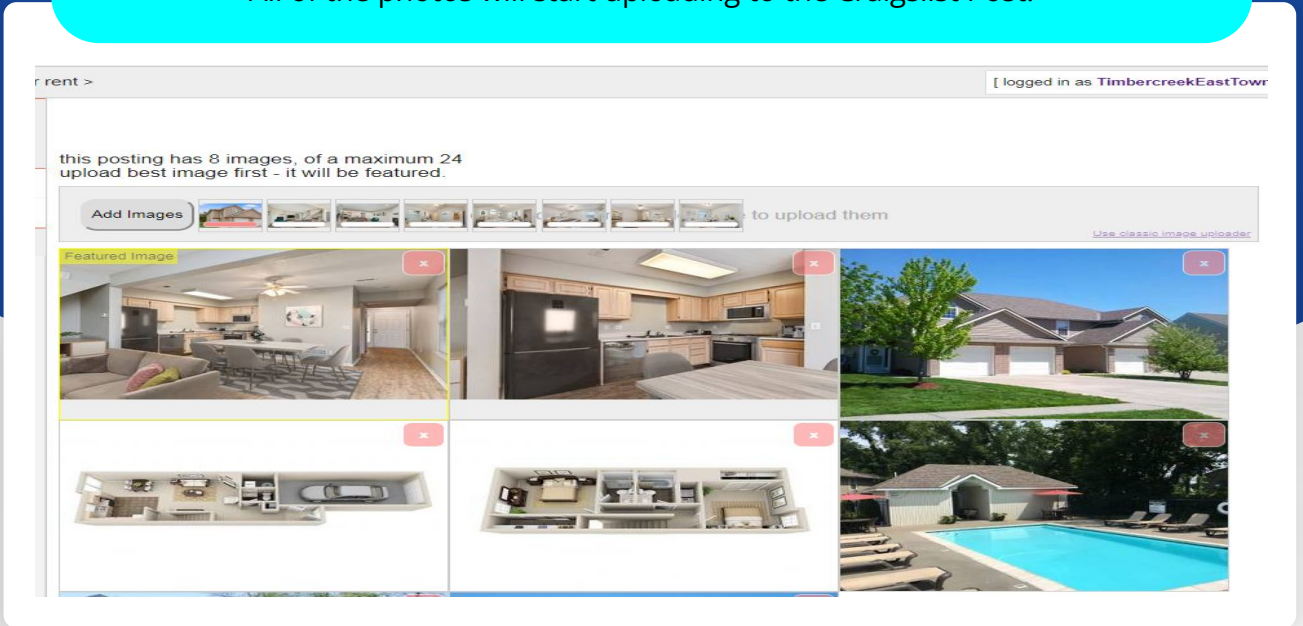
Double-click the **CL Photos folder** to open it and show all the photos that we downloaded. Click on one of the photos and then click **Ctrl + A** to select all of the photos. Then click **Open**.



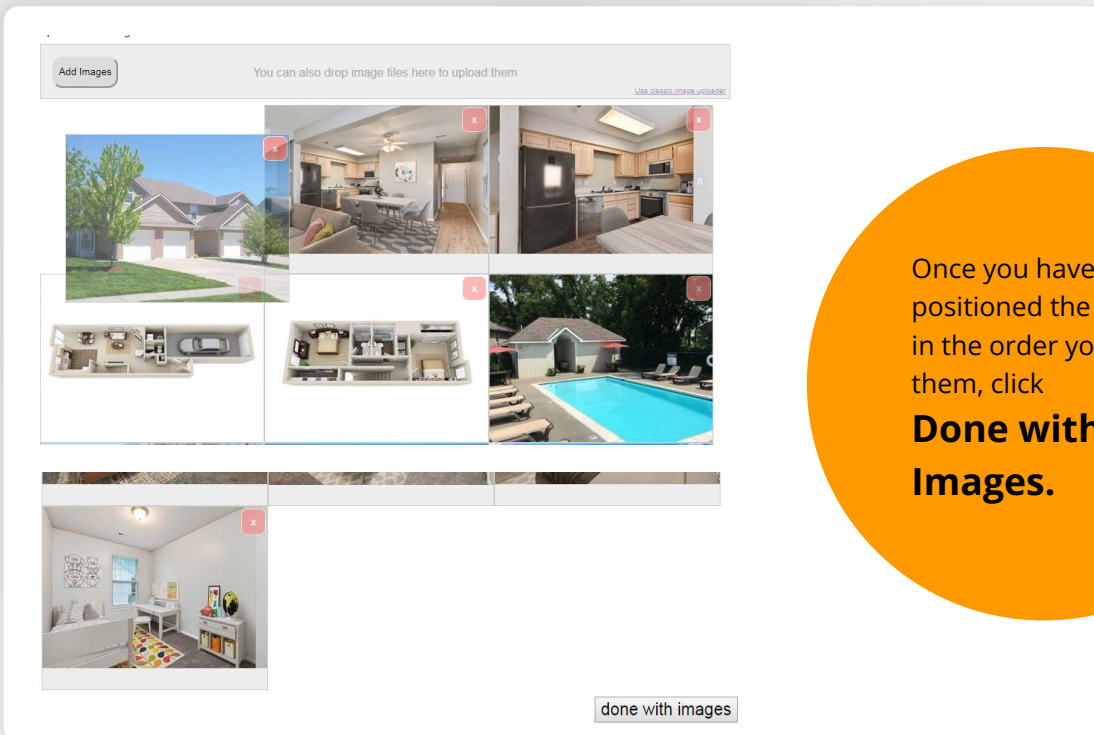
Rent Café Site Manager

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.

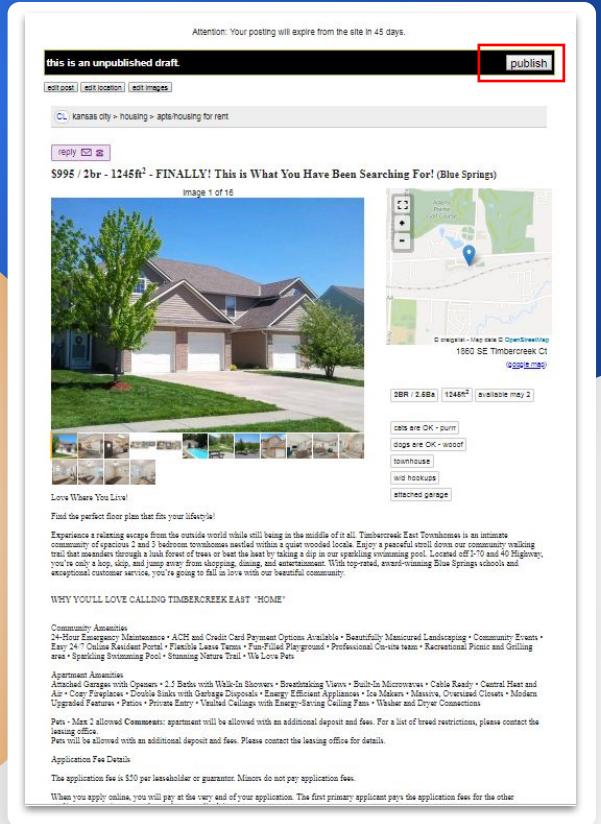


Rent Café Site Manager

Posting on Craigslist Classifieds



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



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

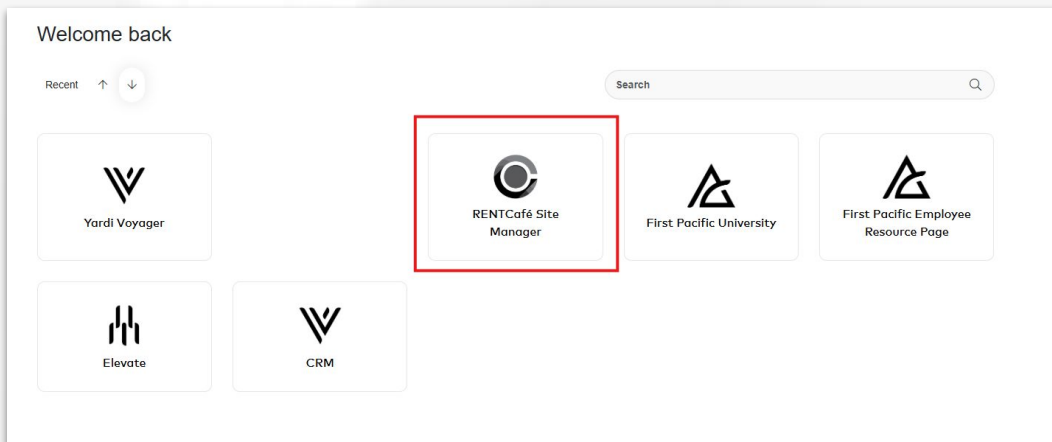
Email sent to: timbercreekeasttownhomes.craigslist.tpg@aptleasing.info

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.



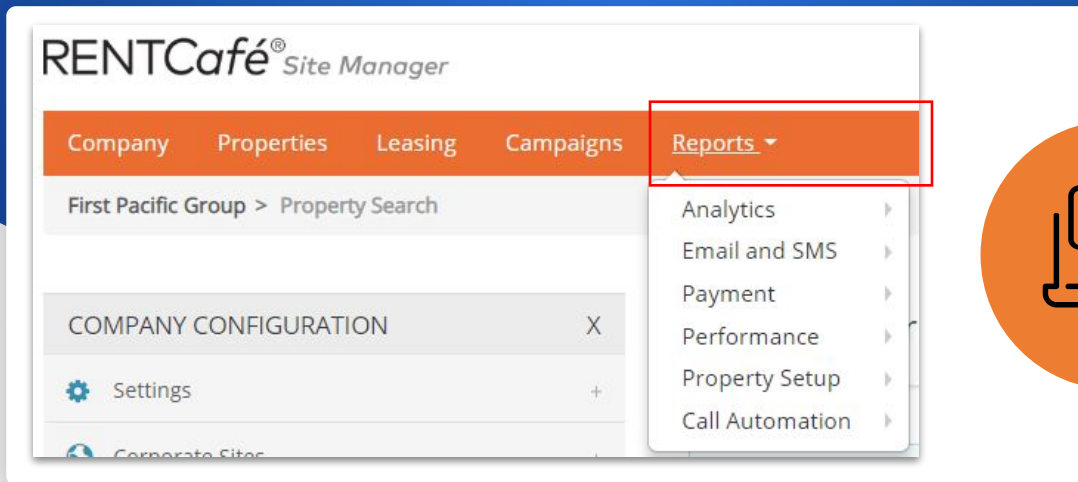
List of Items Done in Site Manager :

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

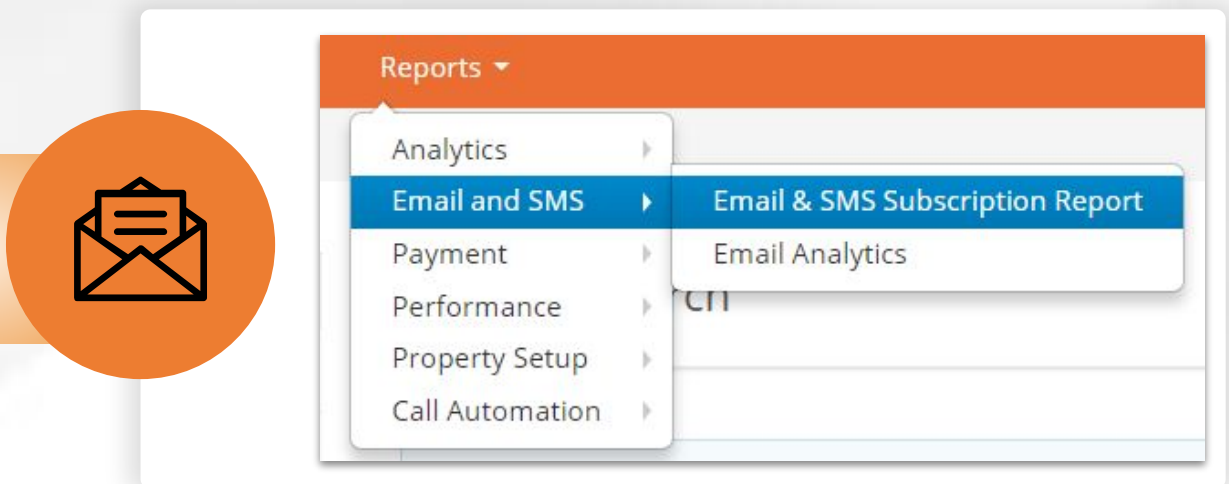
Rent Café Site Manager

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 Ho

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

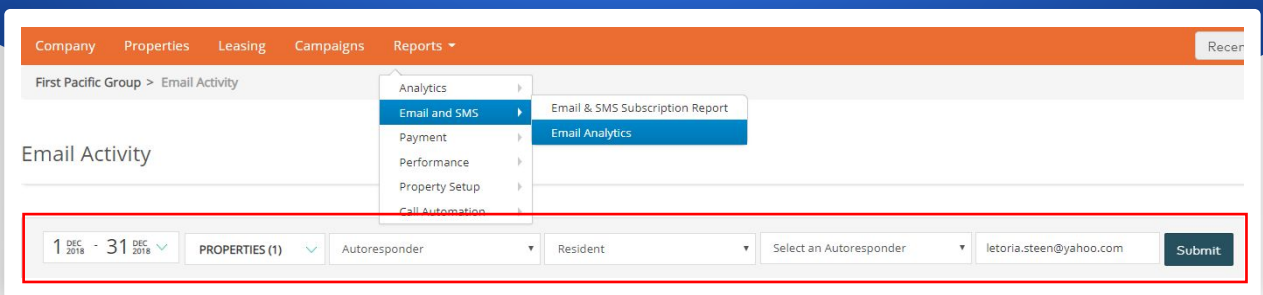
You are also able to export the Email & SMS subscription report into an Excel spreadsheet by selecting the Display drop down under the Filter and selecting Export to Excel and clicking Submit.

Rent Café Site Manager

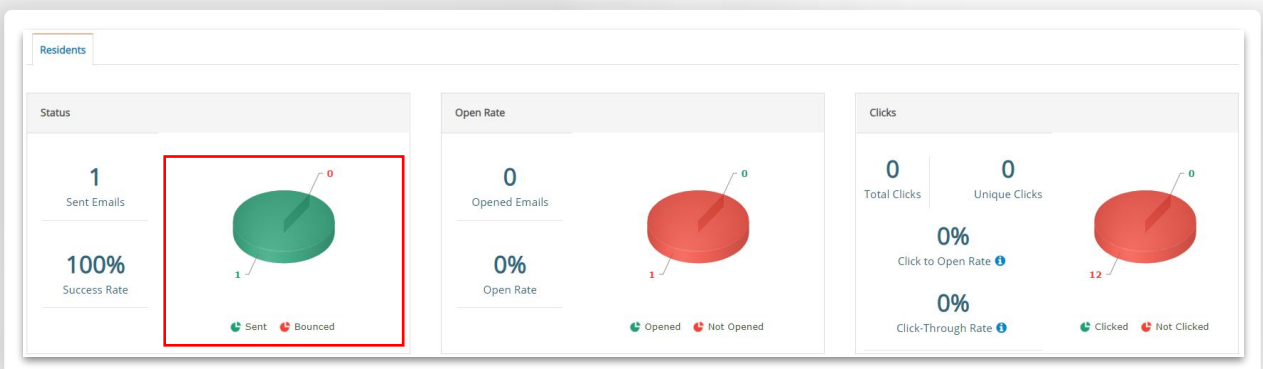
Email Analytics Reports

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	Letoria 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**.

The screenshot shows the 'Reports' dropdown menu with 'Payment' selected, leading to 'Payment Activity'. Below is a filter form with the following fields:

- 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

A 'Submit' button is located at the bottom of the form.

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.

The screenshot shows a table with 72 total records. The table columns are: Property Name, User Name, User Email, Type, Amount, Status, Description, Date (EST), Source, Apartment #, Voyager Property Code, and IP Address. A download menu is open over the table, showing options: Word, Excel, PowerPoint, PDF, TIFF file, MHTML (web archive), CSV (comma delimited), XML file with report data, and Data Feed.

Property Name	User Name	User Email	Type	Amount	Status	Description	Date (EST)	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

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.

02

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

05

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

03

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

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

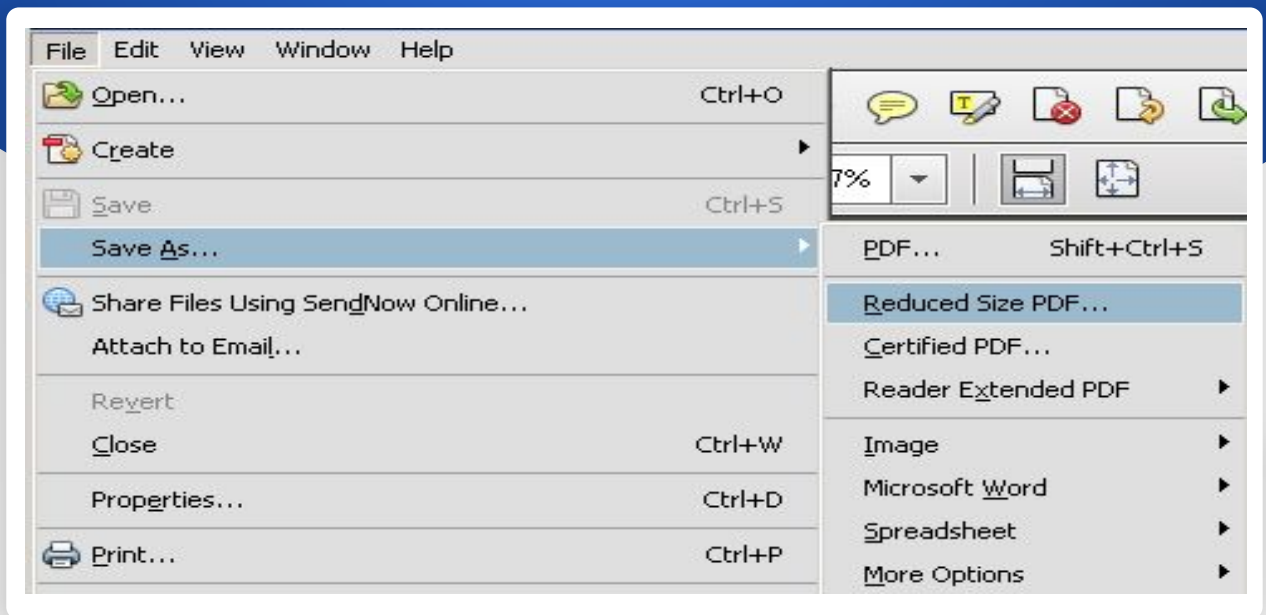
If you find that your PDF files are too large to upload to Yardi or elsewhere, here is an easy way to reduce the size down.

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

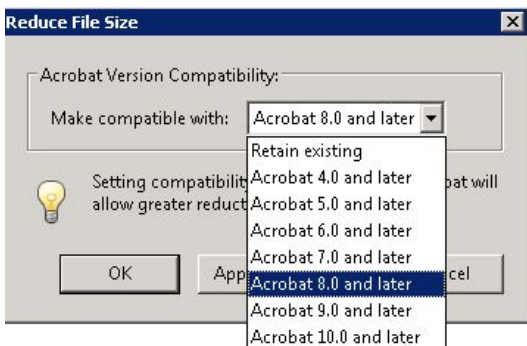
Size ▾

5,572 KB

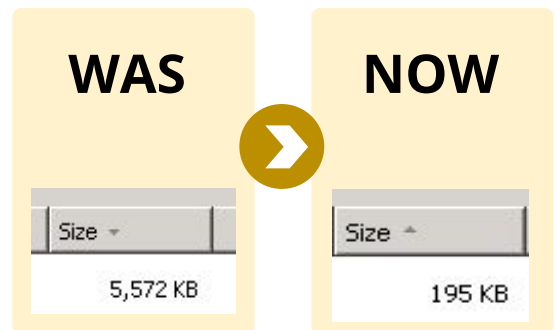
With in Adobe Acrobat (not in Adobe Reader), go to File-> Reduce Size PDF



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 :



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
<ul style="list-style-type: none"> • Issue 90-day Renewal Proposal offer letter to be included on invitation with a small treat <ul style="list-style-type: none"> • 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)

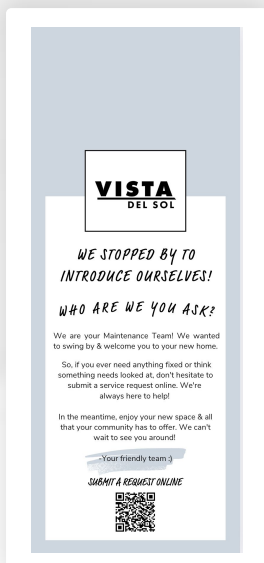
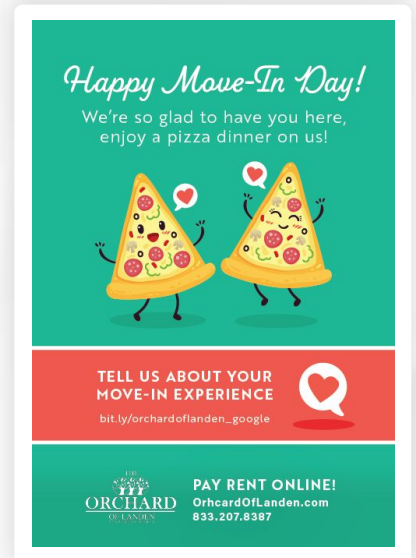
Resident Retention Program

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

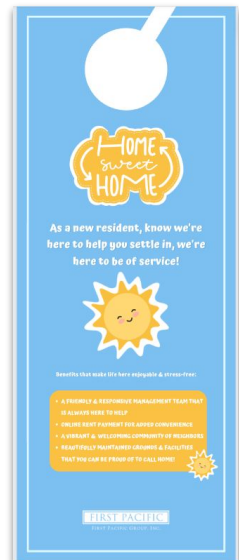
- Follow-up to deliver, "Smile Door Hanger," door hanger

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

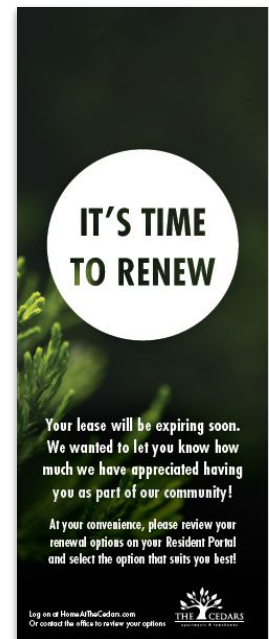
Follow up call to remind them to renew to avoid month-to-month fees.

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.

(Optional) 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★

1★ - Completely Dissatisfied
5★ - Completely Satisfied

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★
Bike/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 _____

SERVICED BY _____

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

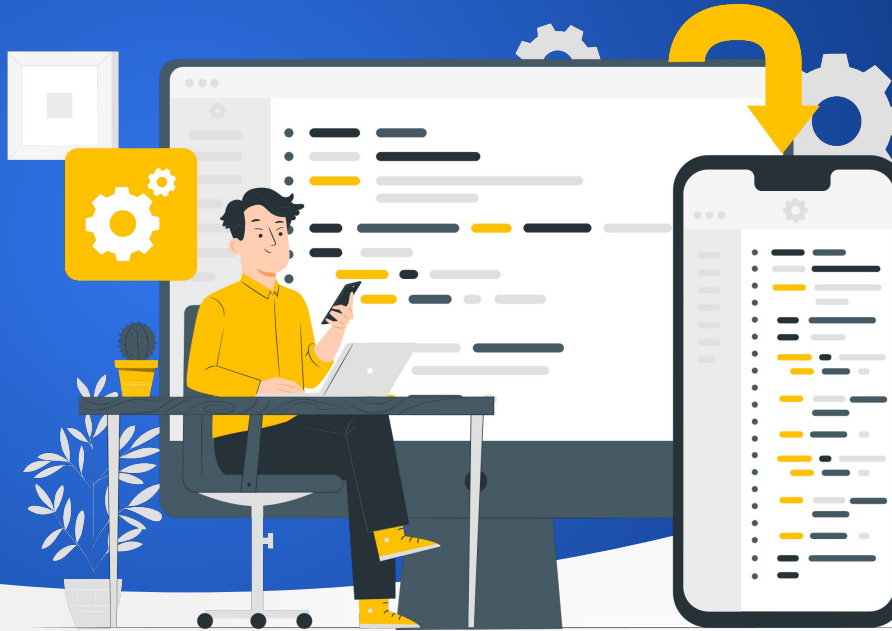
Resident Retention Program

AFTER APARTMENT RATING REVIEW

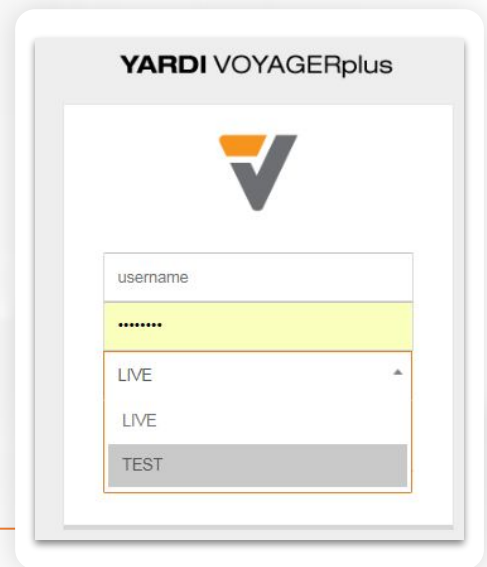
Send a personal thank you card with a gift card once approved by the regional manager.



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.

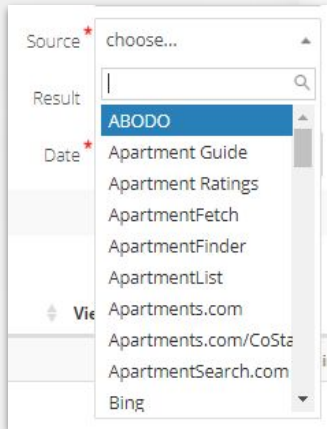
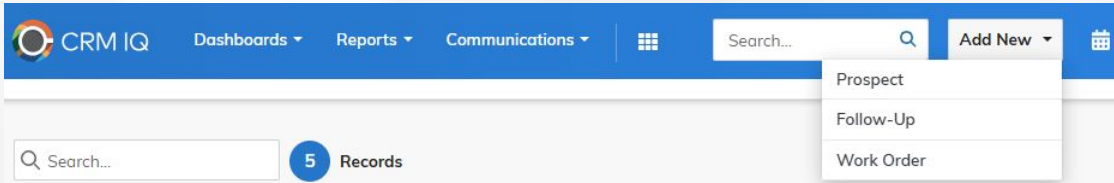
Profile: Click here to update your email signature, e-sign signature, switch to dark/light mode, update your profile, mark yourself as available/busy/away, change systems, or simply just log out.



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* Haley	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
Haley Cornish	(000) 000 - 0000	testtesttest@gmail.com	Prospect		None	Prospect
Haley Cornish	(000) 000 - 0000	trainingtest@gmail.com	Prospect		None	Prospect
Haley Cornish	(567) 843 - 9209	test123test456test@gmail.com	Prospect	cb1b1 (1x1-U)	2102	Prospect

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	hyncrcrnsh@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@ymail.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) 808 - 6154	haleycooksey8@gmail.com	Prospect		None	Prospect
Haley Testc		testhaleyc@hotmail.com	Prospect		None	Prospect
Haley Aldrich		haleyaldrich513@gmail.com	Prospect		None	Prospect

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 📧 📞

timbercreek East Townhomes • p0441025

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 <small>Primary</small>	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

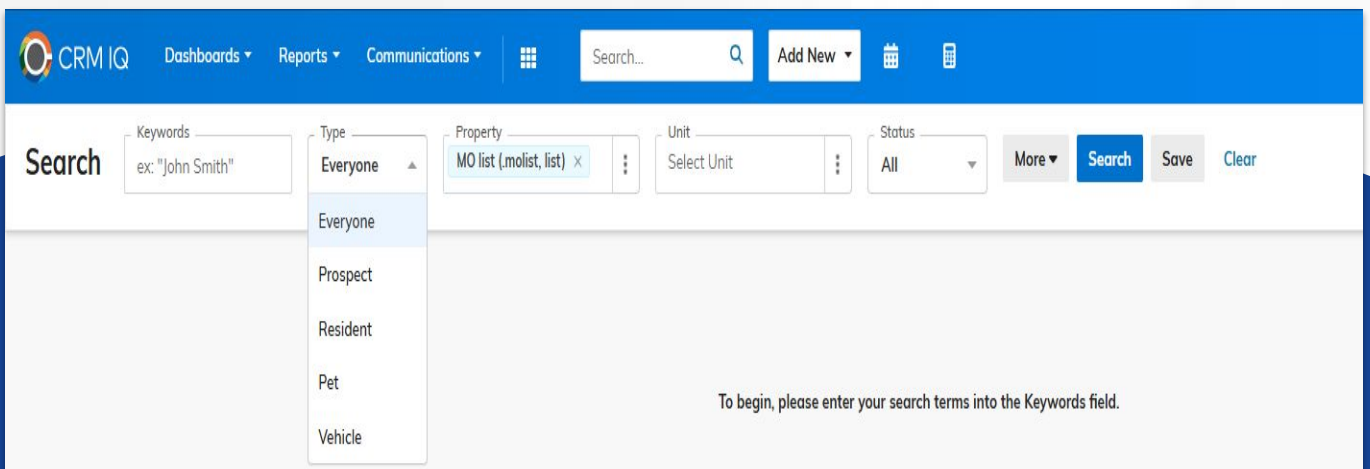
- **Resident Search** | Populates all Future, Current, Notice and Past Residents defaulted by most recent move in date

- **Everyone Search** | Populates both Prospects and Residents

- **Property Search** | Populates properties

- **Unit Search** | Populates all Units listed in order

- **Vehicle Search** | Populates all vehicles



The screenshot shows the CRM IQ Search interface. At the top, there is a navigation bar with 'Dashboards', 'Reports', and 'Communications' menus, a search bar, and an 'Add New' button. Below this, the search form includes several fields: 'Keywords' (containing 'ex: "John Smith"'), 'Type' (with a dropdown menu open showing options: Everyone, Prospect, Resident, Pet, Vehicle), 'Property' (containing 'MO list (.molist, list)'), 'Unit' (containing 'Select Unit'), and 'Status' (containing 'All'). There are also 'More', 'Search', 'Save', and 'Clear' buttons. A message at the bottom of the form reads: '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.



CRM IQ

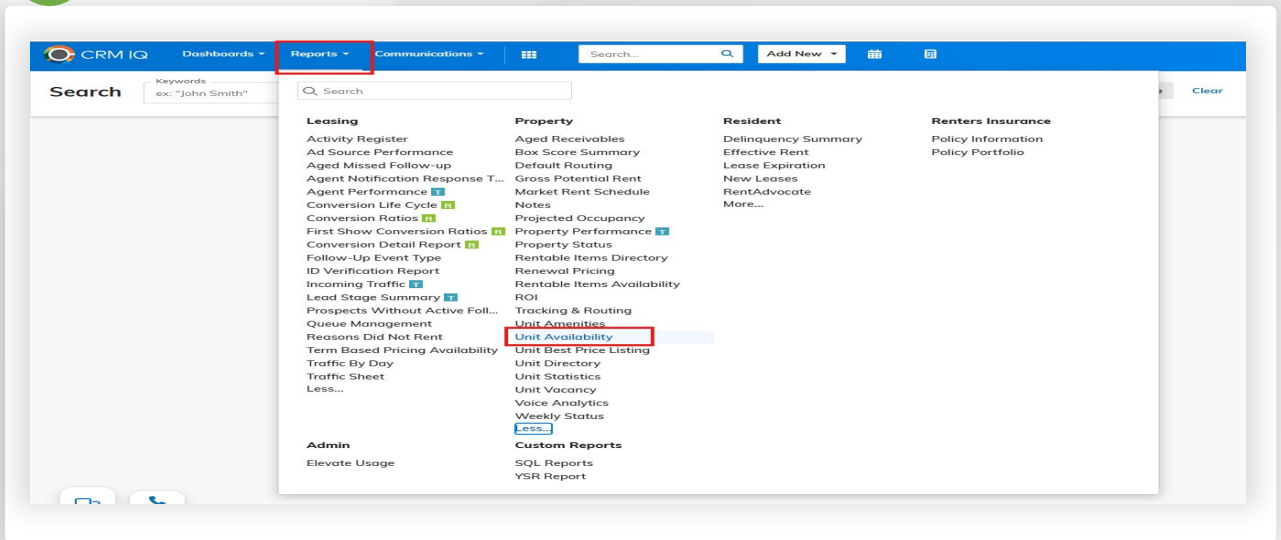
CRM IQ

Unit Availability Report



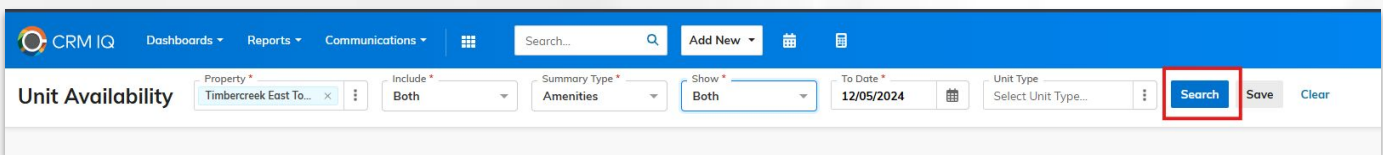
01

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.

Unit Availability

Property * Timbercreek East To... | Include * Both | Summary Type * Amenities | Show * Both | To Date * 12/05/2024 | Unit Type Select Unit Type... | Search Save Clear

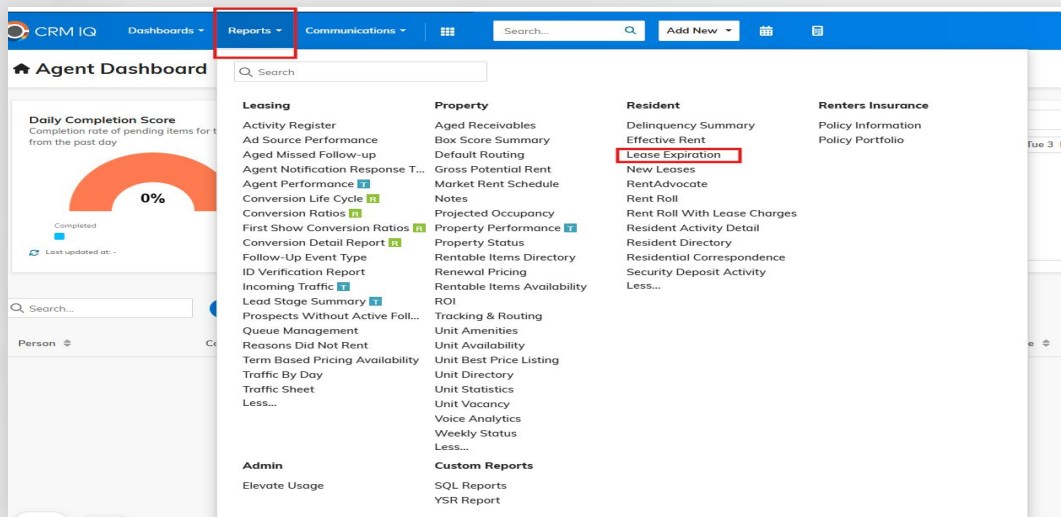
Unit	Resident	Name	Resident Rent	Unit Rent	Resident Deposit	Unit Deposit	Status	Days Vacant	Make Ready	Move In	Hold	Hold Until	Notice	Move Out	Lease Sign	
Timbercreek East Townhomes (te) - Notice Unrented																
Diamond Upgrade,Location Premium A																
1722	10084275	Belknap, Tessa	1,310.00	1,640.00	400.00	0.00	Notice		1/19/2025	1/13/2023	No		10/28/2024	1/15/2025	1/1/2023	1/16/2024 1/15/2025
Notes: Diamond Jan 2025																
Total			1 Unit	1,310.00	1,640.00											
Timbercreek East Townhomes (te) - Occupied No Notice																
Location Premium A																
1702	10085585	Pickett, Danielle	1,330.00	1,340.00	1,290.00	0.00	Current		8/31/2023	8/31/2023	No			8/31/2023	8/31/2023	8/31/2026
1703	10082139	Carrillo, Yolanda	1,310.00	1,340.00	350.00	0.00	Current		1/21/2022	1/19/2022	No			1/18/2022	6/25/2024	9/24/2025
1704	10231970	Hull, Brian	1,310.00	1,340.00	350.00	0.00	Current		8/2/2018	8/4/2018	No			8/3/2018	3/26/2024	3/25/2025
1705	10078256	Bernis, Joel	1,290.00	1,340.00	1,090.00	0.00	Current		7/17/2020	7/16/2020	No			7/16/2020	9/19/2023	3/18/2025
Mindful Grey Point,Location Premium A																
1712	10083674	Bass, Zaniya	1,365.00	1,415.00	750.00	0.00	Current		9/9/2022	9/9/2022	No			9/9/2022	9/12/2023	4/13/2025
Notes: Full paint September 2022																

Export Excel Export PDF Email Report (Schedule)

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



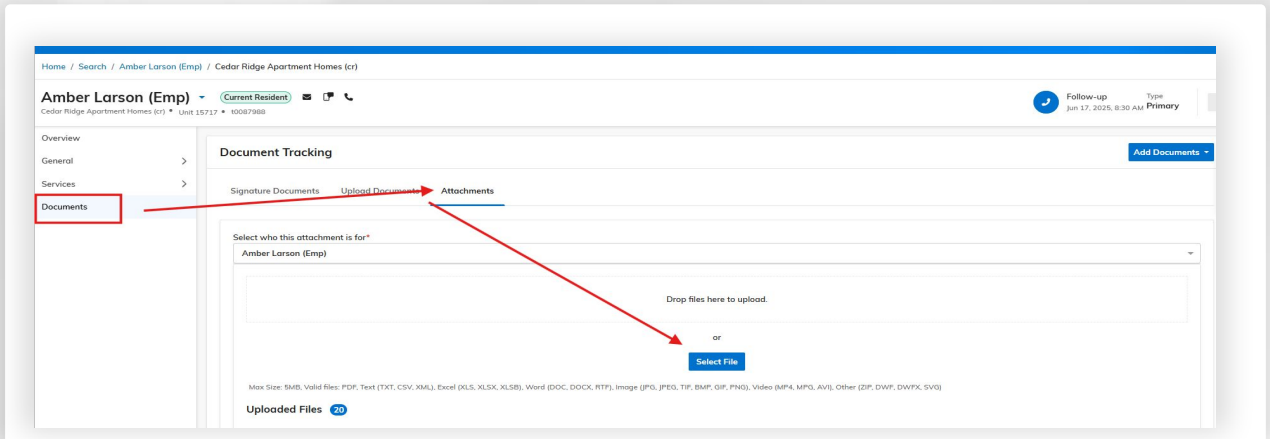
- Enter the filters for Property and month period you are looking for. Then hit Search and the screen below will show. You are able to drill down on any of the blue numbers for more information on the residents expiring that month.

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

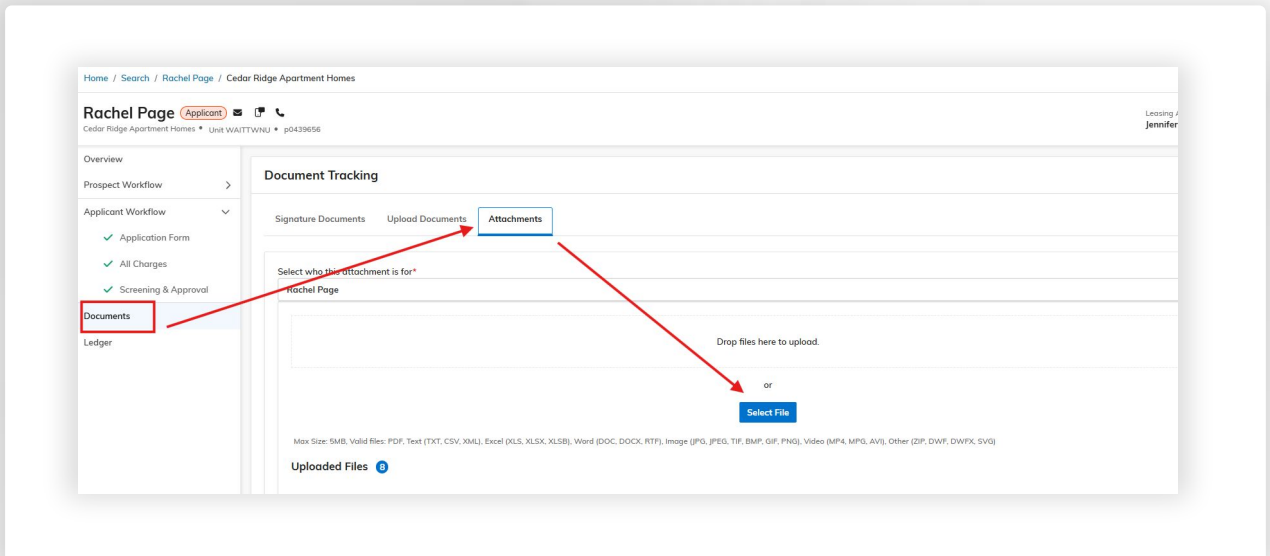


Go to resident's Lease Info page, then click on the Attachments tab



The screenshot shows the CRM IQ interface for a resident's profile. The breadcrumb trail is "Home / Search / Amber Larson (Emp) / Cedar Ridge Apartment Homes (cr)". The profile name is "Amber Larson (Emp)" with a "Current Resident" status. The "Document Tracking" section is active, and the "Attachments" tab is selected. A red box highlights the "Documents" link in the left sidebar. Red arrows point from the "Documents" link to the "Attachments" tab and from the "Attachments" tab to the "Drop files here to upload." area. The "Select File" button is also visible.

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's profile. The breadcrumb trail is "Home / Search / Rachel Page / Cedar Ridge Apartment Homes". The profile name is "Rachel Page" with an "Applicant" status. The "Document Tracking" section is active, and the "Attachments" tab is selected. A red box highlights the "Documents" link in the left sidebar. Red arrows point from the "Documents" link to the "Attachments" tab and from the "Attachments" tab to the "Drop files here to upload." area. The "Select File" button is also visible.

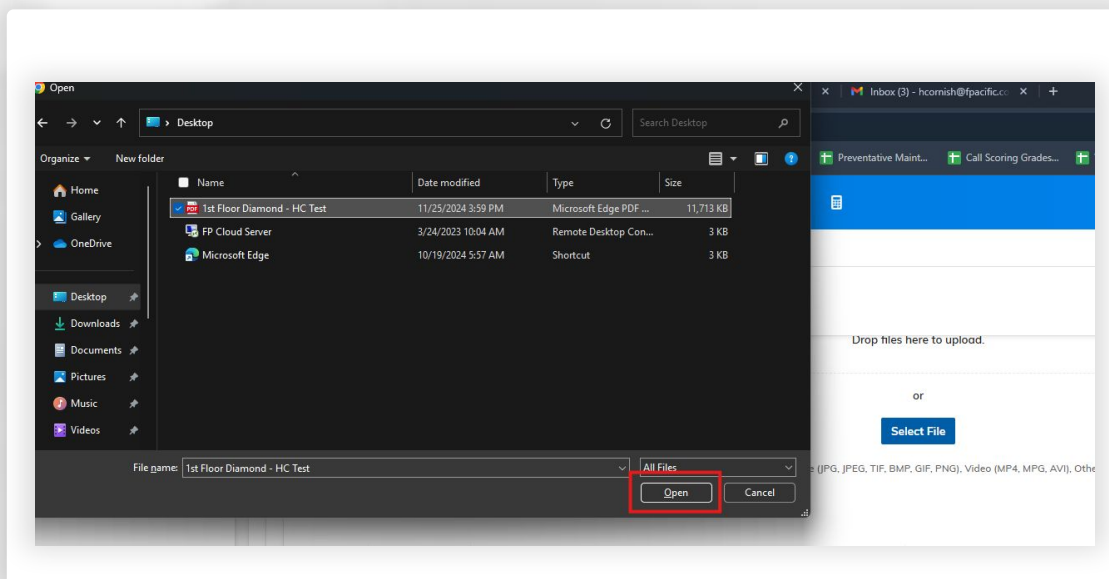
Once on the Attachments screen, click on the **Choose Files** button.

Choose Files Start Upload Cancel Upload Delete Selected

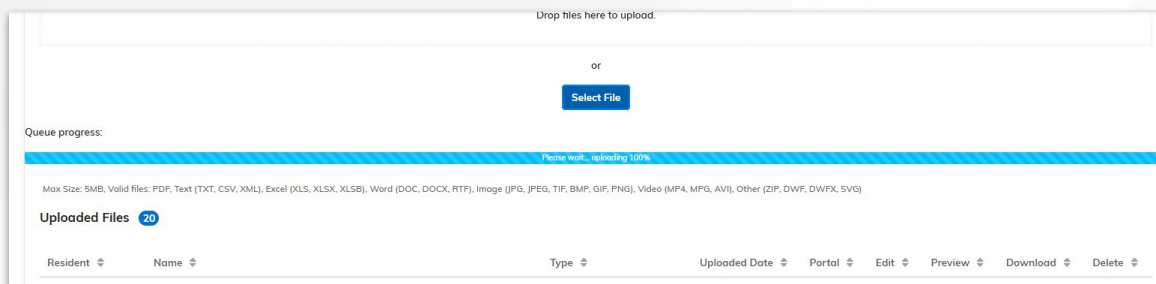


Adding Attachments IN CRM IQ

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.





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.



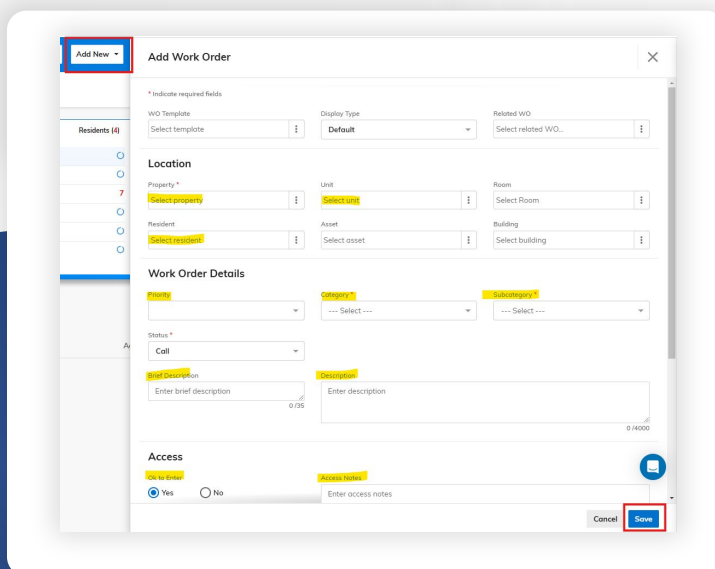
Work Order Reminders

- 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**

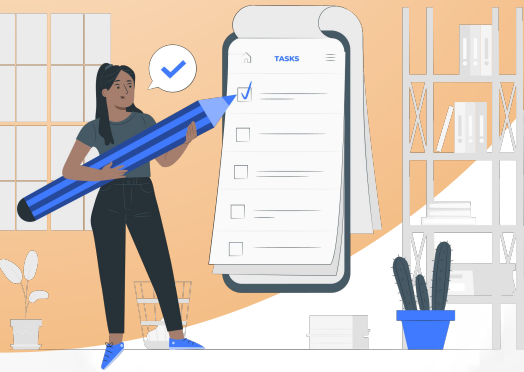
- Select Unit from drop down and Resident from drop down. The resident information will auto populate. Verify all information that populated is correct including Name, phone number and email address.
- Enter a brief description of the problem and Select the category from the drop down.
- Enter full description 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



The screenshot shows the 'Add Work Order' form with the following sections:

- 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:**
 - Health question: Yes (selected) / No
 - Access notes: Enter access notes

Buttons: 'Add New' (top left), 'Cancel' and 'Save' (bottom right).



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.



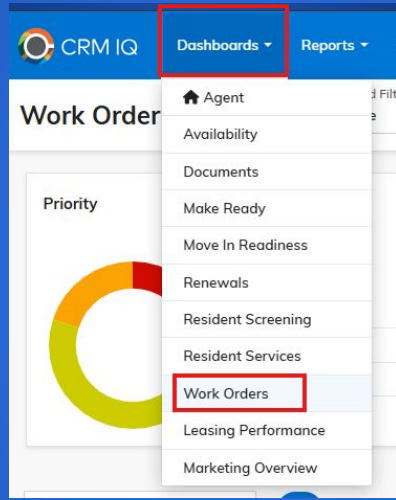
The technician should also include his/her name and the time they were in the apartment as well.



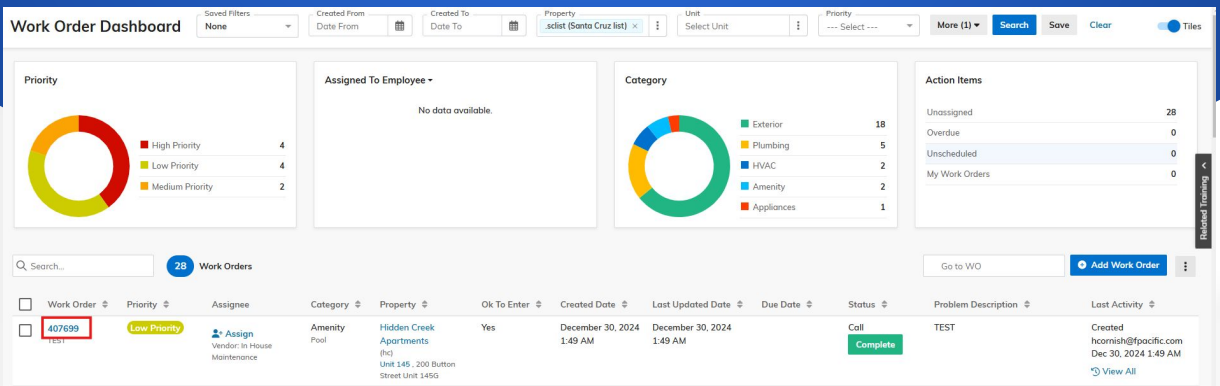
The technician should note if any charge back for damages or replacements should be charged to the resident.

Closing Out Work Orders

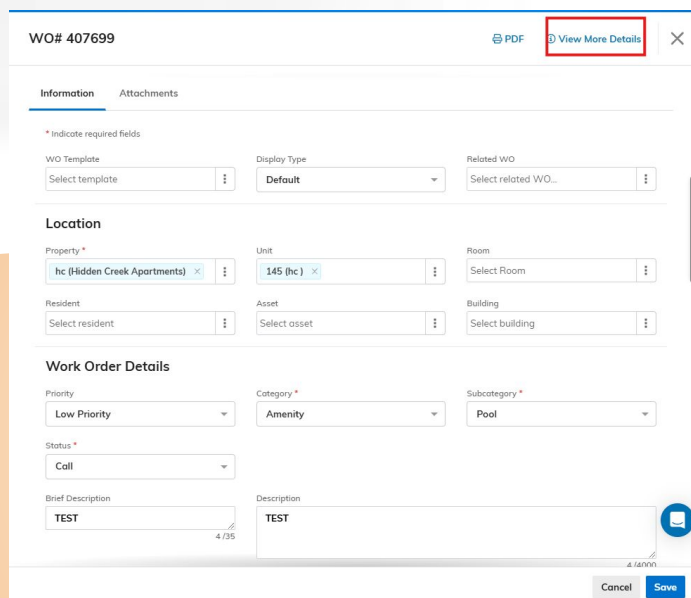
To close a Work Order go to the work order Dashboard in CRM IQ.



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

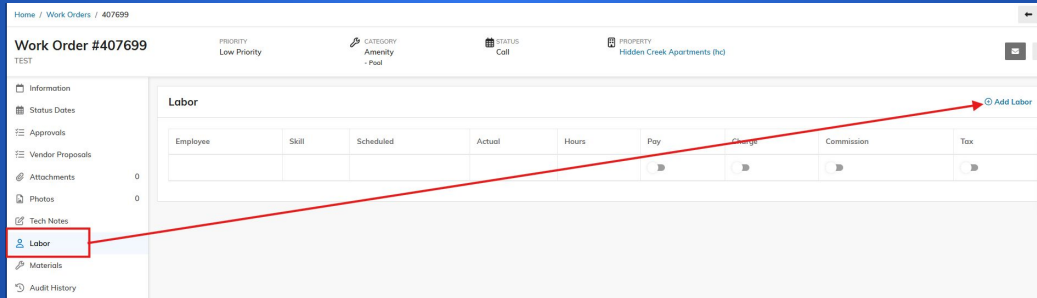


After clicking the hyperlink a the work order details will appear. Click View More Details in the top right corner to add the techs labor times.



Closing Out Work Orders

Click Labor on the left side menu and then click + 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 ✕

<div style="border: 2px solid red; padding: 5px;"> <p>Employee * <input type="text" value="jambriz (Jaime Ambriz)"/></p> <p>Skill <input type="text" value="Select skill..."/></p> <p>Scheduled Start <input type="text" value="12/30/2024 7:00 am"/></p> <p>Scheduled Finish <input type="text" value="12/30/2024 7:00 am"/></p> <p>Actual Start <input type="text" value="12/30/2024 7:00 am"/></p> <p>Actual Finish <input type="text" value="12/30/2024 7:05 am"/></p> <p>Total Hours <input type="text" value="0"/></p> </div>	<p>Commission <input type="checkbox"/></p> <p>Pay <input type="checkbox"/></p> <p>Unit Pay (\$) <input type="text" value="0"/></p> <p>Pay Amount (\$) <input type="text" value="0"/></p> <p>Pay Account <input type="text" value="Select Pay Account..."/></p> <p>Unit <input type="text" value="Select Unit..."/></p> <p>Tax <input type="checkbox"/></p> <p>Charge <input type="checkbox"/></p> <p>Unit Charge (\$) <input type="text" value="0"/></p> <p>Charge Amount (\$) <input type="text" value="0"/></p> <p>Charge Code <input type="text" value="Select Charge Code..."/></p> <p>Unit <input type="text" value="Select Unit..."/></p>
---	---

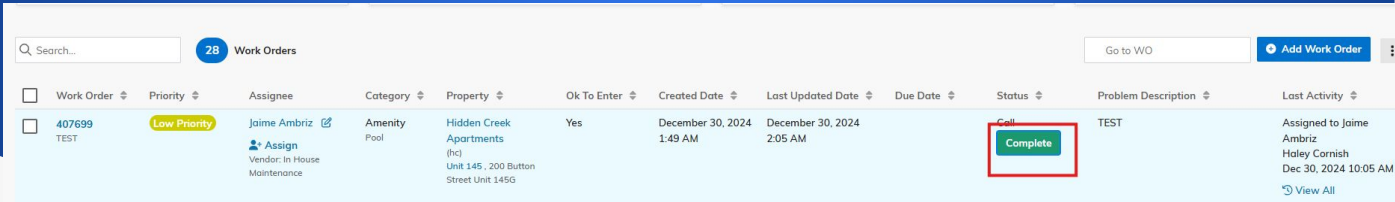
Save

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

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

Closing Out Work Orders

Once returned find your work order and click Complete

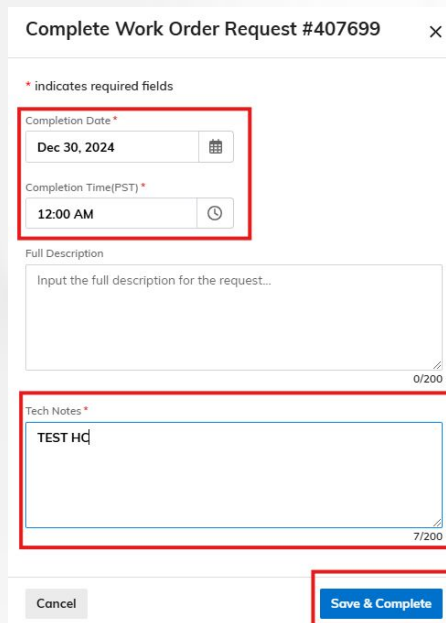


Work Order	Priority	Assignee	Category	Property	Ok To Enter	Created Date	Last Updated Date	Due Date	Status	Problem Description	Last Activity
407699 TEST	Low Priority	Jaime Ambriz Assign Vendor: In House Maintenance	Amenity Pool	Hidden Creek Apartments (H) Unit 145, 200 Button Street Unit 145G	Yes	December 30, 2024 1:49 AM	December 30, 2024 2:05 AM		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 Hc
7/200

Cancel Save & Complete

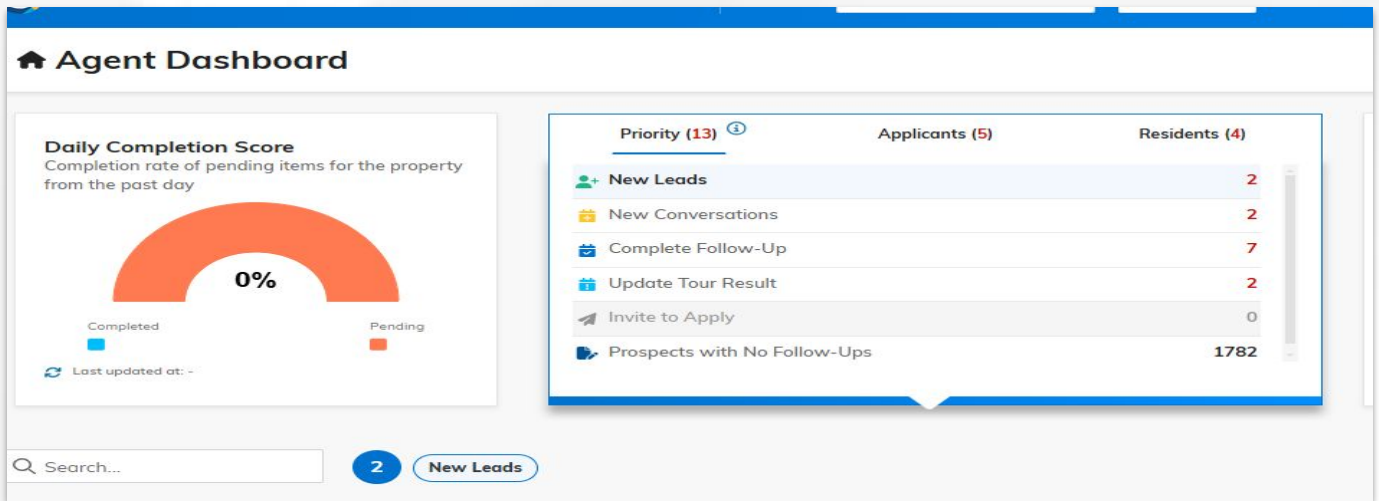
The WO is now completed in Yardi and will no longer show on your dashboard.

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.



Agent Dashboard

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

0%

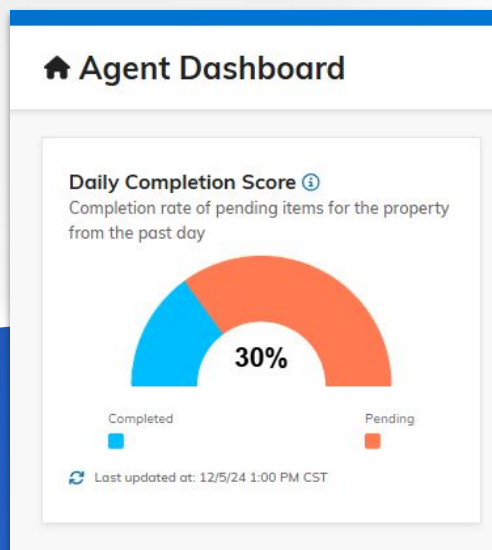
Completed Pending

Last updated at: -

Priority (13)	Applicants (5)	Residents (4)
New Leads		2
New Conversations		2
Complete Follow-Up		7
Update Tour Result		2
Invite to Apply		0
Prospects with No Follow-Ups		1782

Search... 2 **New Leads**

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.



Agent Dashboard

Daily Completion Score ⓘ
Completion rate of pending items for the property from the past day

30%

Completed Pending

Last updated at: 12/5/24 1:00 PM CST

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)

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

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

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

Name	Call	Phone Number	Contact	Property	Source
(No Name)	Listen <small>Dec 5, 2024</small>	(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) <small>Cancelled Guest</small>	(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.

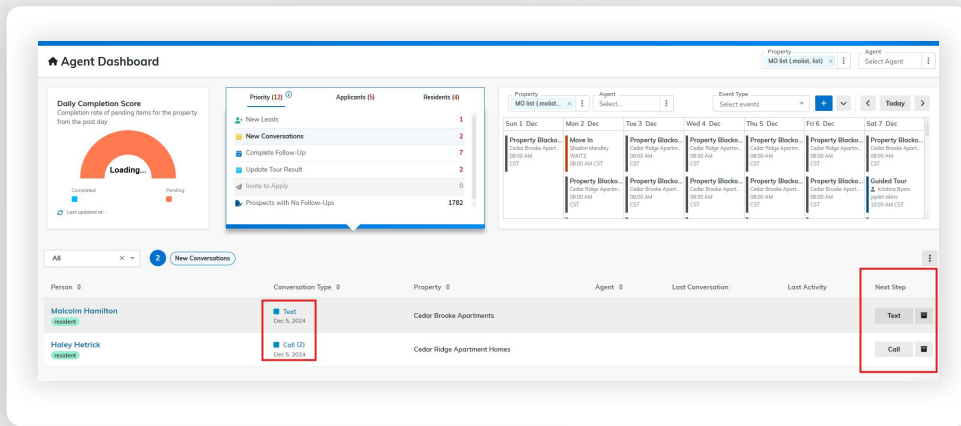
Create Prospect

CRM IQ

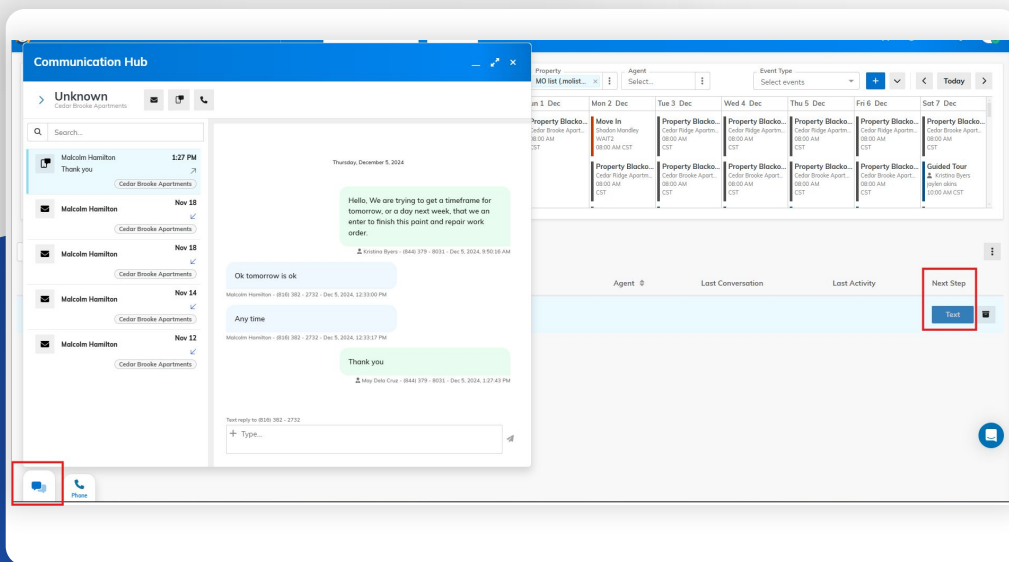
New Conversations



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.



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 'Agent Dashboard' with a 'Complete Follow-Up' section. The dashboard includes a 'Daily Completion Score' gauge, a summary of tasks (New Leads, New Conversations, Complete Follow-Up, Update Tour Result, Invite to Apply, Prospects with No Follow-Ups), and a calendar view. The 'Complete Follow-Up' table lists tasks for three prospects: Namiah Ross, Erika Miller, and Rachel Roland. Each row includes columns for Person, Follow-Up Details, Property, Agent, Last Conversation, Last Activity, and Next Step. The 'Next Step' column for Namiah Ross and Rachel Roland shows a 'Call' button, which is highlighted with a red box in the image.

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.

This is a close-up view of the 'Complete Follow-Up' table. A red box highlights the 'Call' button in the 'Next Step' column for the first row, Namiah Ross. The table columns are: Person, Follow-Up Details, Property, Agent, Last Conversation, Last Activity, and Next Step.

The 'Follow-Up' form contains the following fields:

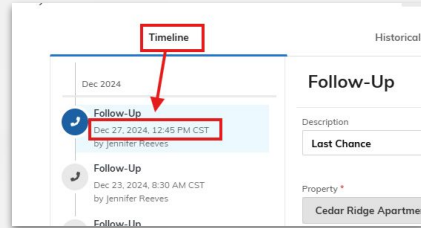
- Description: Final Follow Up Call
- Property: Timbercreek East Townhomes (te)
- Unit: [Empty]
- Customer: namiah ross (Prospect - No Unit)
- Agent: LeaAI LeaAI
- Channel: Call
- Phone Result: --- Select ---

Deactivating Follow ups

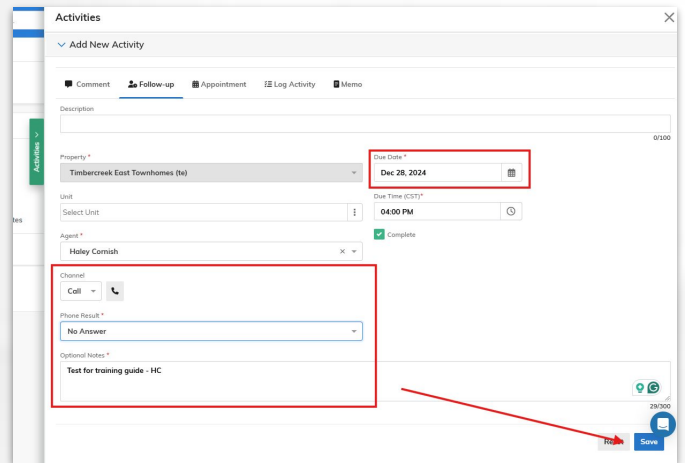
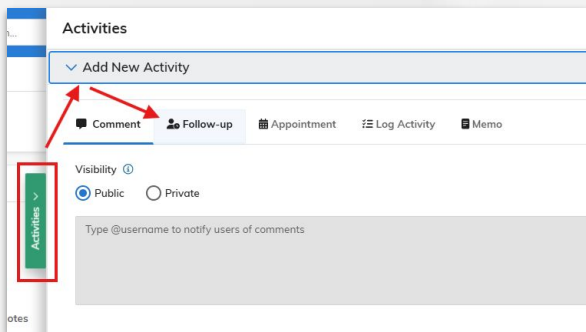


We should NOT be deleting any guest cards out of our system. Instead, we need to deactivate the follow ups, so we aren't spamming prospects if they're uninterested.

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

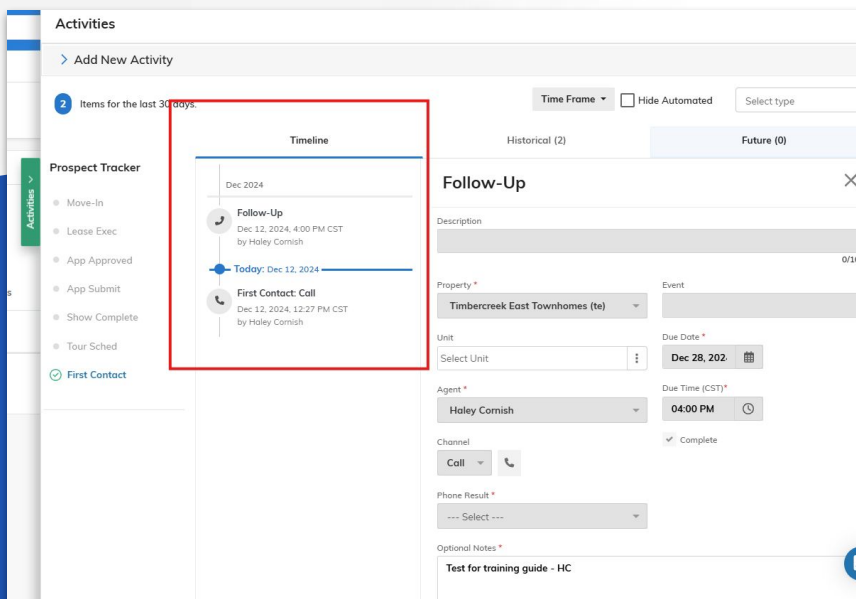


Once click Activities located on the right side of the profile view the timeline to determine the last follow up due. Then you'll click Add New Activity → Follow up → Change Due date to the day AFTER the last follow up → Select the channel, result, and add your notes → Click the Complete Box → Save.



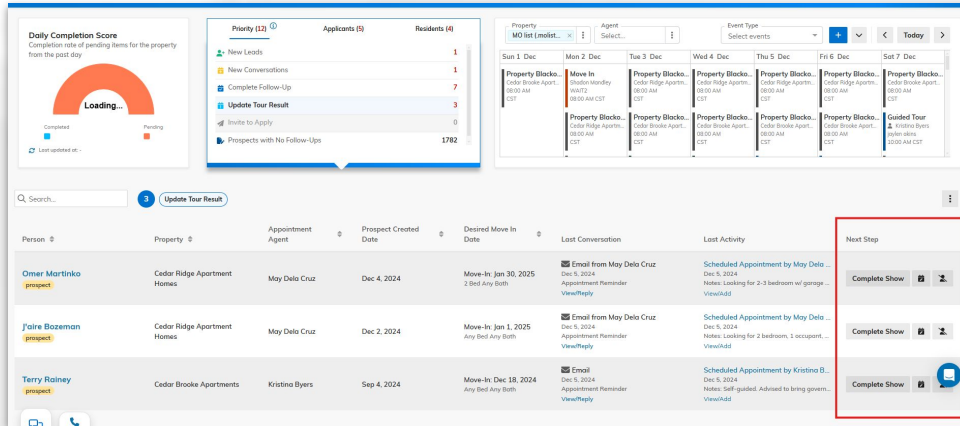
Once completed

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



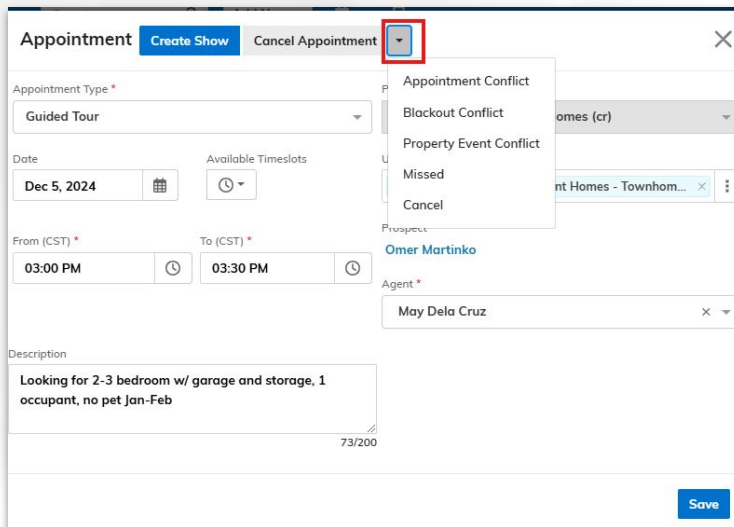
Update Tour Results

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.



Person	Property	Appointment Agent	Prospect Created Date	Desired Move In Date	Last Conversation	Last Activity	Next Step
Omer Martinko	Cedar Ridge Apartment Homes	May Dela Cruz	Dec 4, 2024	Move-In Jan 30, 2025 2 Bed Any Both	Email from May Dela Cruz Dec 5, 2024 Appointment Reminder ViewReply	Scheduled Appointment by May Dela Cruz Dec 5, 2024 Notes: Looking for 2-3 bedroom w garage... ViewAdd	Complete Show
J'aire Bozeman	Cedar Ridge Apartment Homes	May Dela Cruz	Dec 2, 2024	Move-In Jan 1, 2025 Any Bed Any Both	Email from May Dela Cruz Dec 5, 2024 Appointment Reminder ViewReply	Scheduled Appointment by May Dela Cruz Dec 5, 2024 Notes: Looking for 2 bedroom, 1 occupant... ViewAdd	Complete Show
Terry Rainey	Cedar Brooke Apartments	Kristina Byers	Sep 4, 2024	Move-In Dec 18, 2024 Any Bed Any Both	Email Dec 5, 2024 Appointment Reminder ViewReply	Scheduled Appointment by Kristina B... Dec 5, 2024 Notes: Self-guided. Advised to bring green... ViewAdd	Complete Show

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



Appointment Create Show Cancel Appointment ▼

Appointment Type *
Guided Tour

Date
Dec 5, 2024

Available Timeslots
From (CST) * 03:00 PM To (CST) * 03:30 PM

Description
Looking for 2-3 bedroom w/ garage and storage, 1 occupant, no pet Jan-Feb

Prospect *
Omer Martinko

Agent *
May Dela Cruz

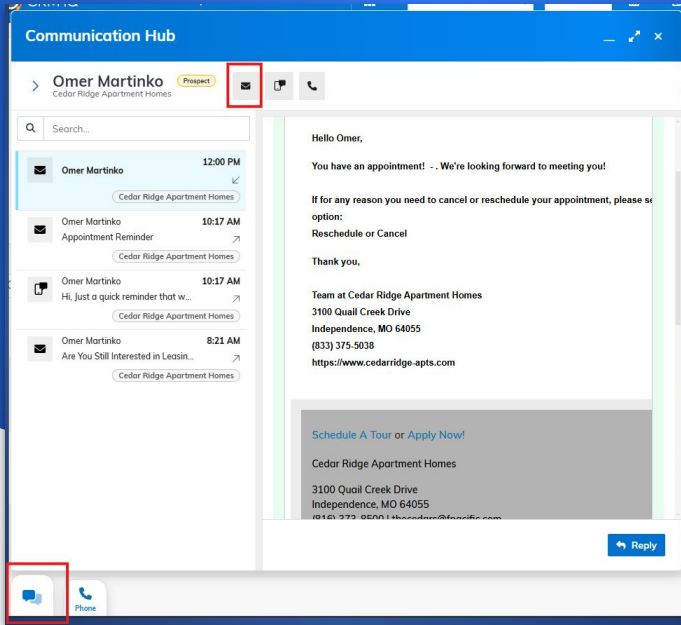
Save

- Appointment Conflict
- Blackout Conflict
- Property Event Conflict
- Missed
- Cancel

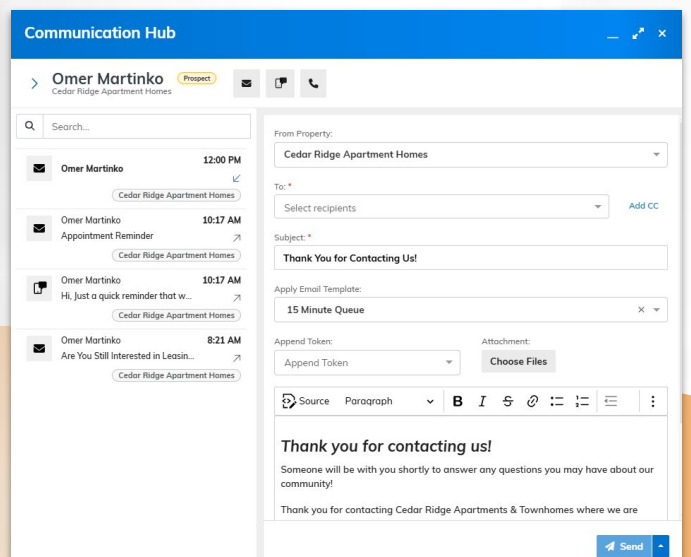
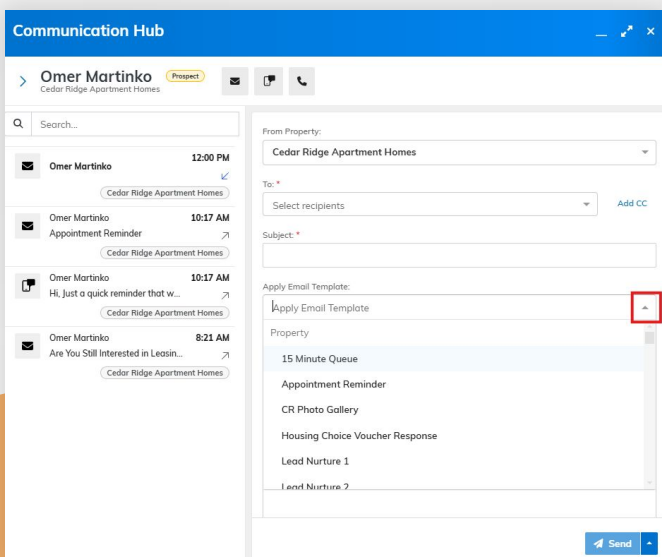
CRM IQ Email Templates

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.

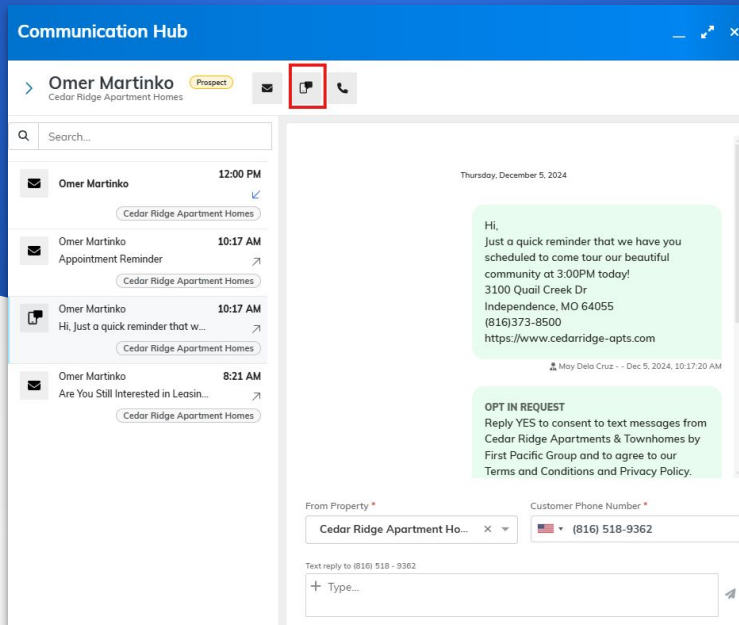


CRM IQ Text Templates

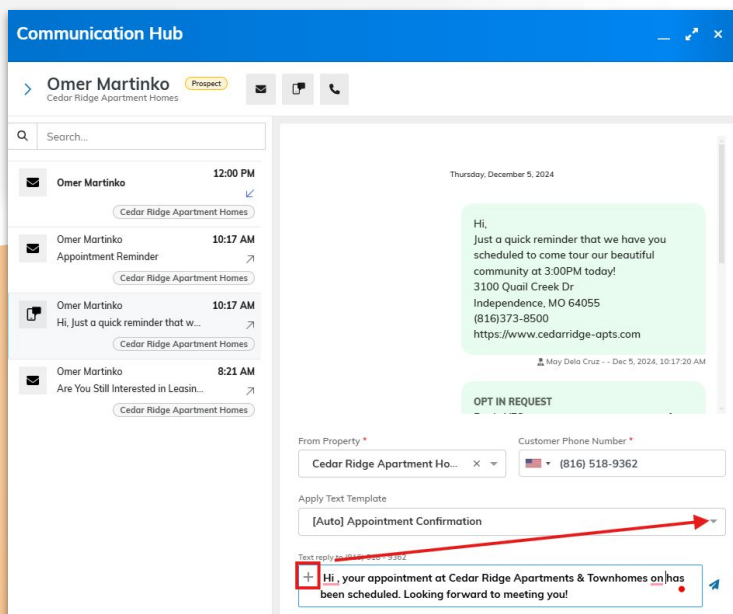
All email communications will be created directly from the Com-Hub. You have multiple ways to access this. You can search the prospect / resident, simply click the com-hub, or click on a task in your queue box to access it.

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.



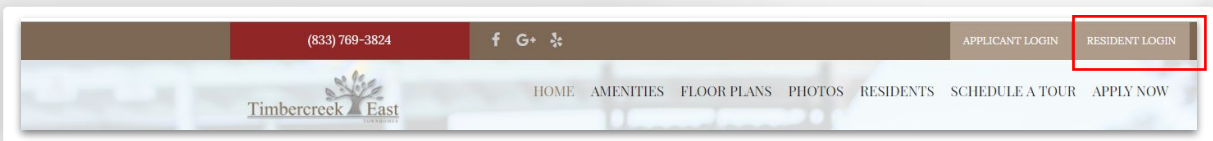
Resident Portal

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

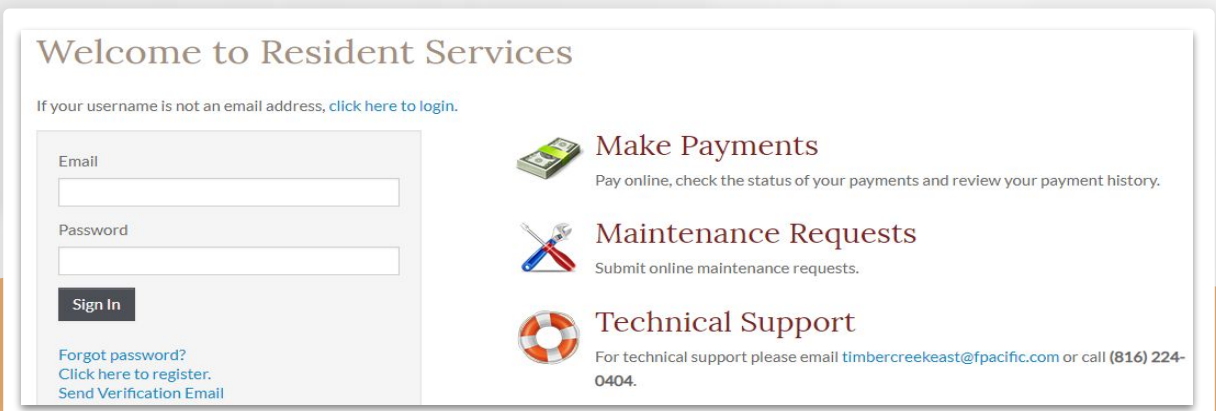
- Set up one-time and recurring payments
- Edit their profile
 - Update Email Address
 - Update Phone number
 - Subscribe to Email and SMS Notifications
 - Update vehicle Information
- Change Password
- Submit Maintenance and Office Requests
- Select lease renewal proposals
- Sign lease documents
- View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

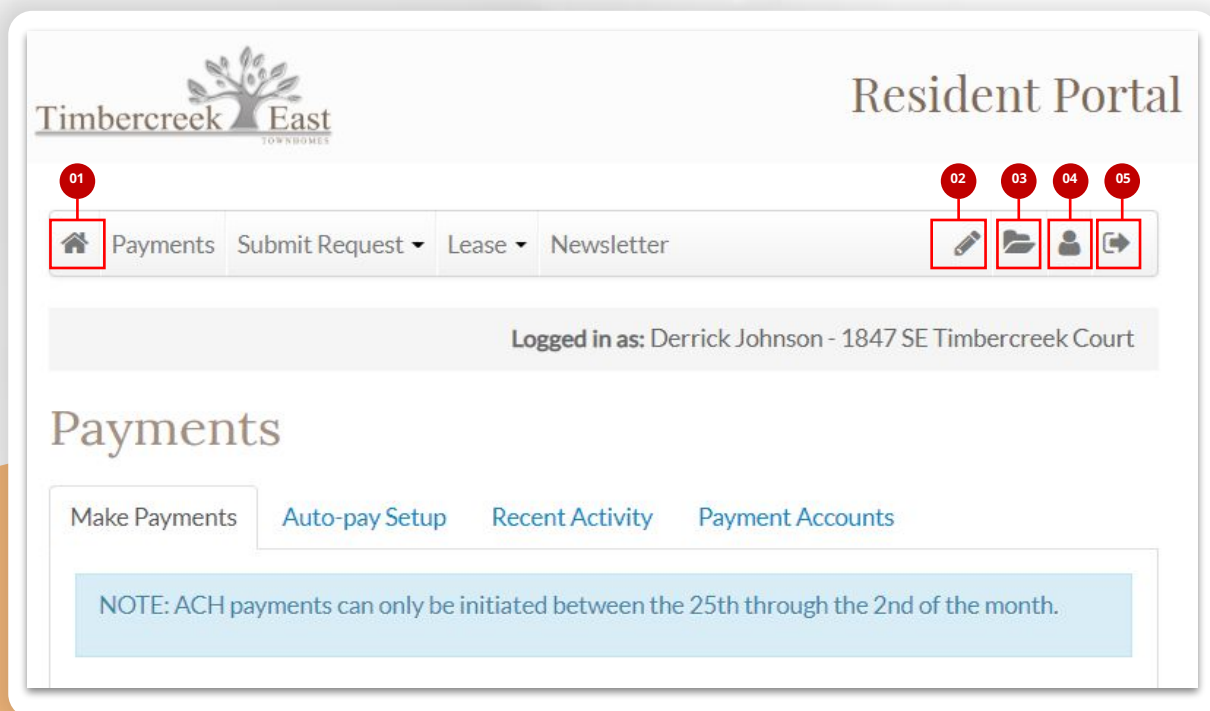
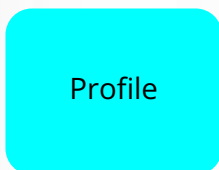
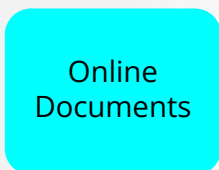
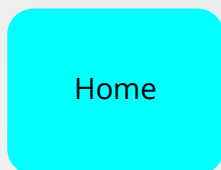
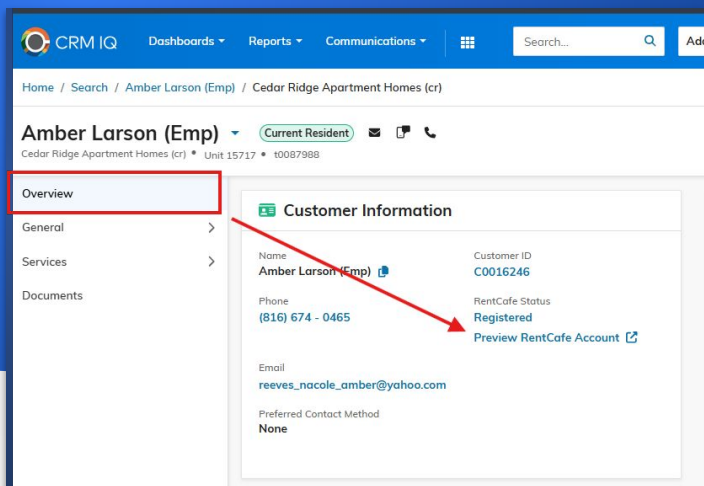


Resident Portal

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.

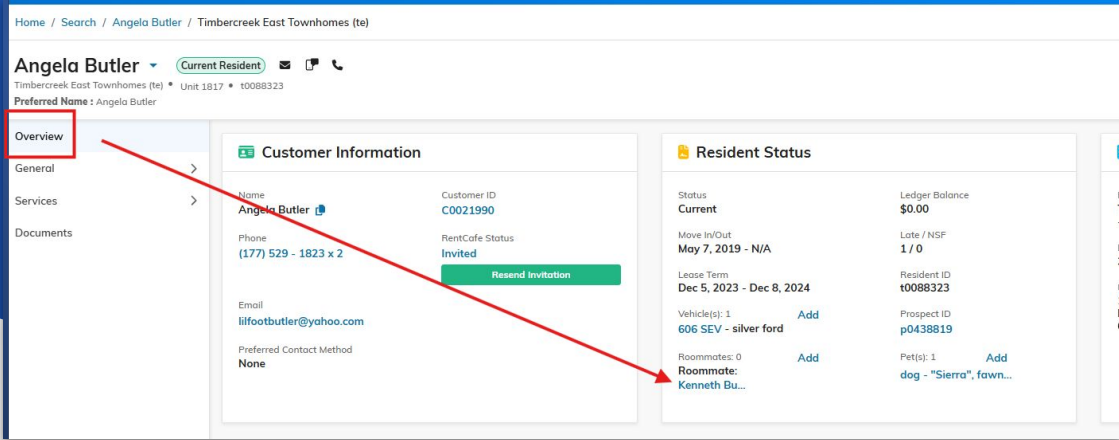
For the **Primary Resident**, in their Customer Information Box click Preview RentCafe Account under RentCafe Status.

Clicking the link will pop open the Resident Portal window.

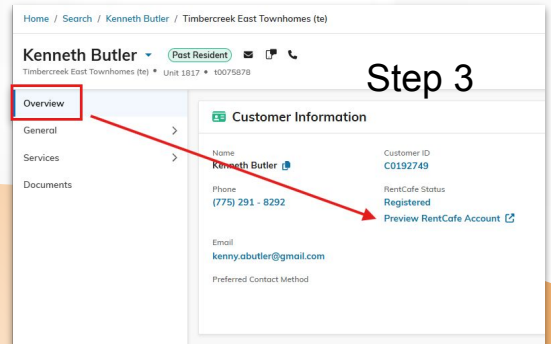
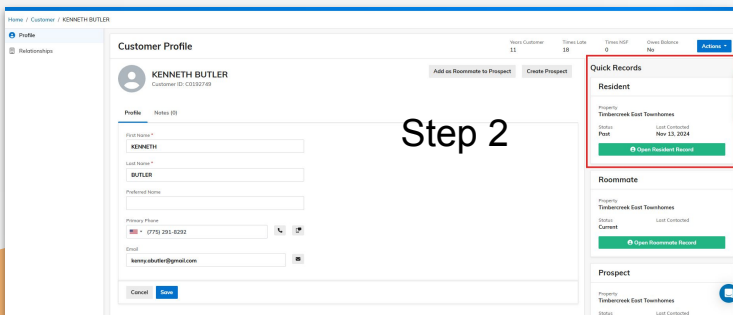
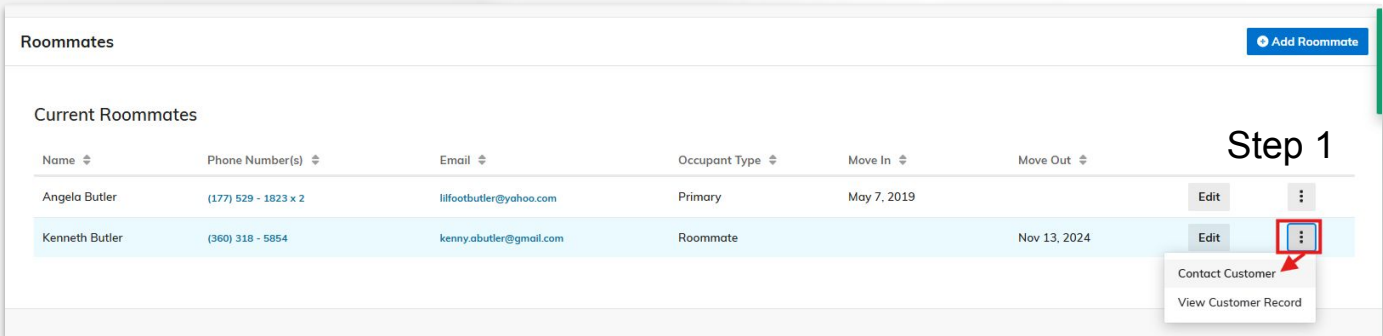


Resident Portal

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



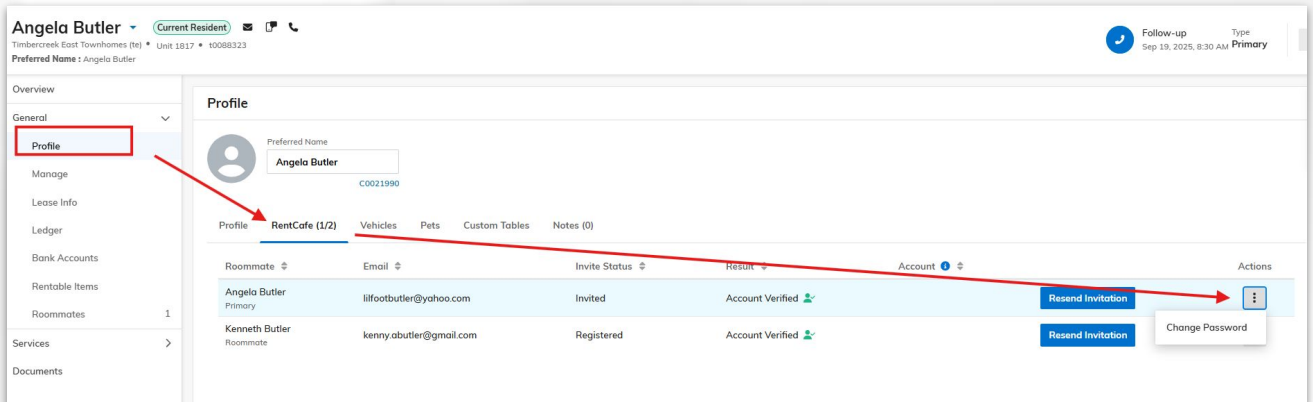
Click the three dots or kabob → View Customer Record → Open Resident Record → Preview RentCafe Account



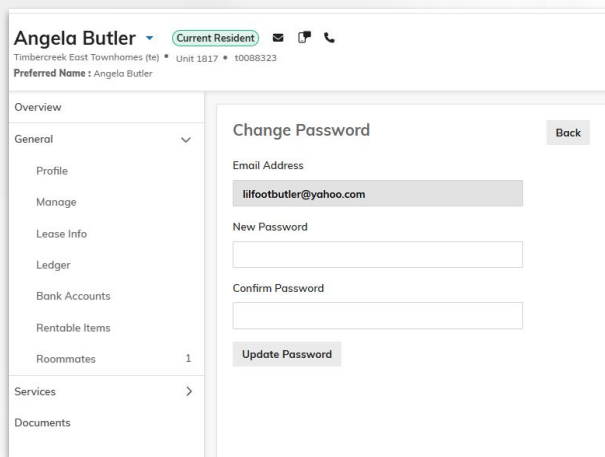


Reset Resident Portal Password

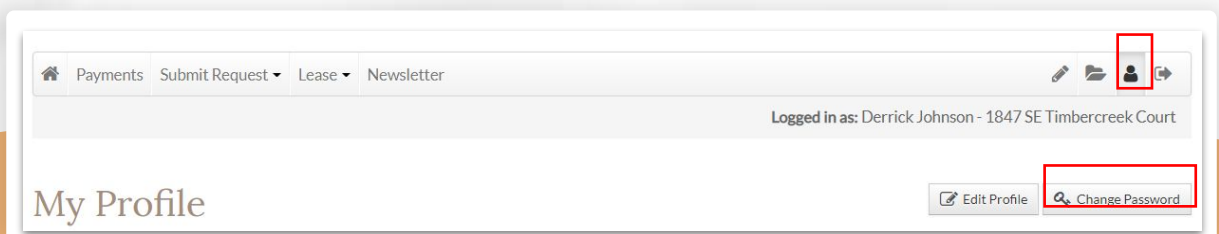
If a resident cannot access their Online Resident Portal, we have the option to reset their password on their behalf. From the Resident **Profile** screen, click RentCafe → 3 dots or kabob → Change Password



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**.



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





Unlock Resident Portal Password

If a resident cannot access their Online Resident Portal, after being taken off of eviction we will have to manually unlock the portal from Site Manager. From Site Manager got to Company Management → User Management → Edit filters for the site → in the search bar type the resident name → Click the pencil → Uncheck the lock box → Save.

The screenshot shows the Site Manager interface. The top navigation bar includes 'Company', 'Properties', 'Leasing', 'Resident referrals', and 'Reports'. A sidebar on the left contains 'COMPANY CONFIGURATION' with sub-items: Settings, Specialty Sites, Content Management, Company Management (highlighted with a red box), User Management, Email, Text Message Management, and Property Setup | Metrics. The main area is titled 'Property Search' and contains a table with columns: Name, Address, City, State, Published On ILS, and Publ. The table lists properties like 'Autumn Ridge Apartment Homes' and 'Cedar Brooke Apartments'.

The screenshot shows the 'User Management' section. A search bar at the top contains 'ALL USERS' (with a dropdown arrow), 'Registered' (with a clear 'x' button), 'PROPERTIES (1)', and a 'Search' button. Below the search bar is a '+ Additional Filters' link.

The screenshot shows a table of users. The search bar at the top contains 'amber larsen'. The table has columns: Full Name, Details, Registration Status, Account Status, and Actions. Two entries for Amber Larson are shown. The second entry has a pencil icon in the Actions column, which is highlighted with a red box.

Full Name	Details	Registration Status	Account Status	Actions
Amber Larson alarsen@fpacific.com	Site Manager Property Manager Voyager Property Security	Registered on 11/13/2023 Last login: 1/6/2025 Voyager Property Security Last Updated: 2/4/2025	Active	
Amber Larson reeves_nacole_amber@yahoo.com	Office: (816) 373-8500 - 2 more Residence Cedar Ridge Apartments & Townhomes t0087988	Registered on 9/3/2024 Last login: 1/4/2025 Failed login: 1/4/2025	Active ✓ Verified	

The screenshot shows the user profile form for Amber Larson. Fields include: name (Amber Larson), User Name (reeves_nacole_amber@yahoo.com), Date Registered (9/3/2024), Email Verified (checked), and User Account Status (Enabled). There are links for 'Change Password' and 'Change Email Address'.

The screenshot shows the 'Resident Profiles' table. It has columns: Property Name, Resident Code, Lock This Resident, and Use New Resident Portal. The entry for 'Cedar Ridge Apartments & Townhomes' has a checkbox for 'Lock This Resident' which is highlighted with a red box.

Property Name	Resident Code	Lock This Resident	Use New Resident Portal
Cedar Ridge Apartments & Townhomes	t0087988	<input type="checkbox"/>	No



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.

The screenshot shows the 'Payments' section of the Resident Portal. The 'Payment Accounts' tab is selected and highlighted with a red box. Below the tabs, the 'Bank Accounts' section is visible, with an 'Add Bank Account' button highlighted in a red box. Below this is a table with columns: Name on Account, Bank Transit Number, Bank Account Number, Account Type, Edit, and Delete. The table is currently empty, showing 'No data available in table'. Below the table, it says 'Showing 0 to 0 of 0 entries'. At the bottom, the 'Credit Cards or Debit Cards' section is visible, with 'Add Credit Card' and 'Add Debit Card' buttons highlighted in a red box.

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
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

Checking Account

Save







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	BILLING ADDRESS
   	Country <input type="text" value="United States"/>
Card Number * <input type="text"/>	Address Line 1 <input type="text"/>
Name on the Card * <input type="text"/>	Address Line 2 <input type="text"/>
Exp Date * <input type="text" value="Month"/> <input type="text" value="Year"/>	City <input type="text"/>
CVV Code * <input type="text"/>	State <input type="text" value="State"/>
	Zip <input type="text"/>

I have read & agree to the terms & conditions.

Fields marked with (*) are required.



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.



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

Missing a payment can be expensive.

Set up auto-pay >

Charge	Amount	Charged on
December Monthly Charges		

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

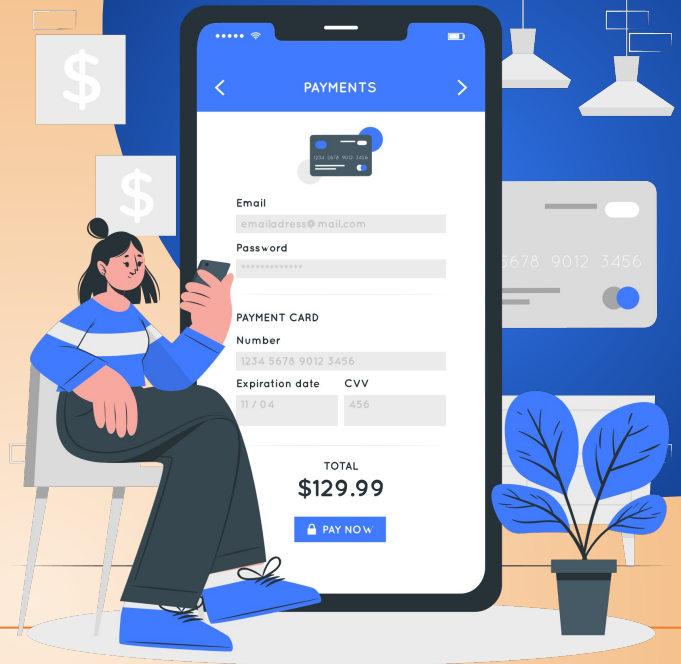
Select Payment Account ---Select Payment Account--
---Select Payment Account---

Extra Payment Amount AmexXXXX-1252
Visa XXXX-4293

Next



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](#)

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

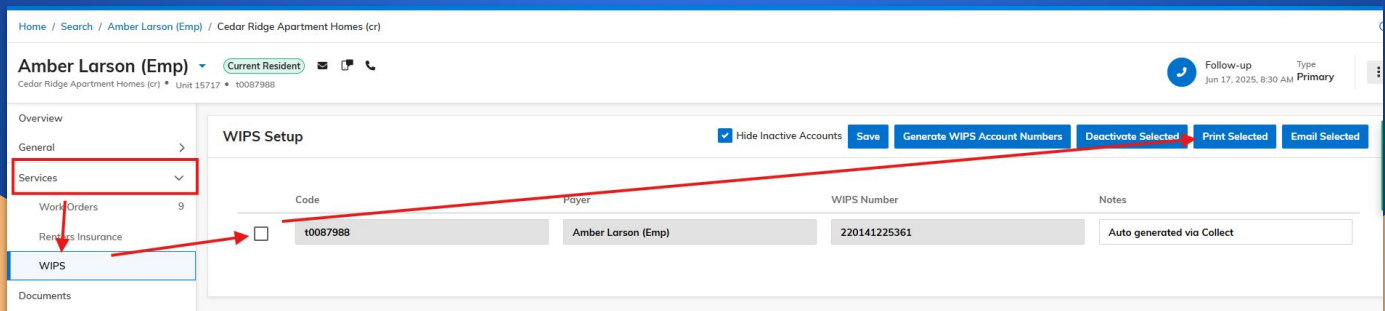


Save

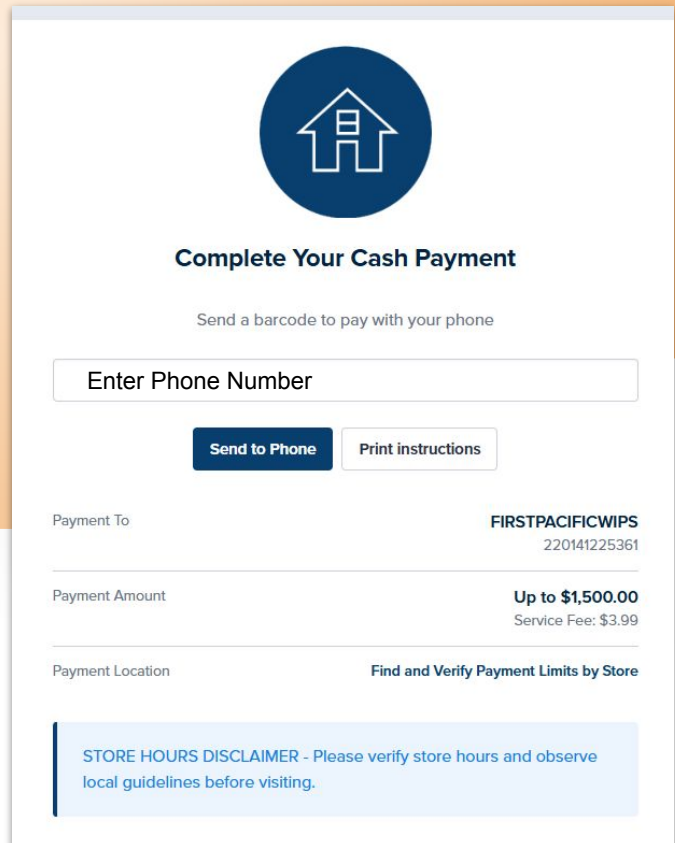
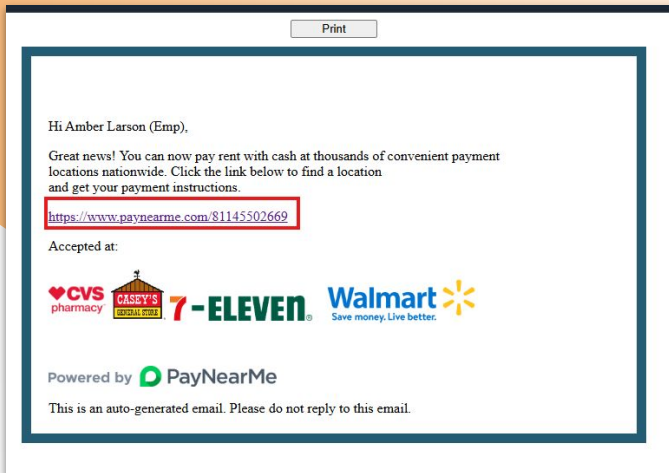
Edit

WIPS | PayNearMe

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




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



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

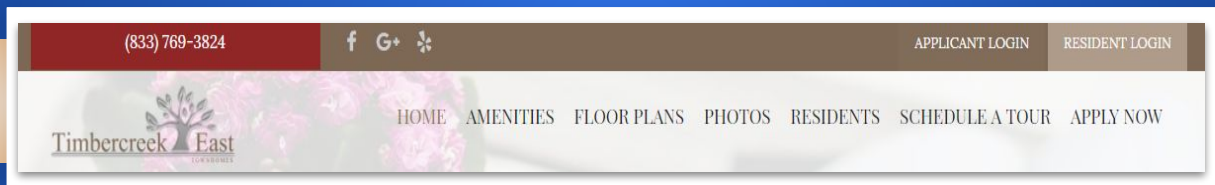
PayNearMe cash payment help 888-714-0004 (Payment Code 1EKABZ)

Online Application

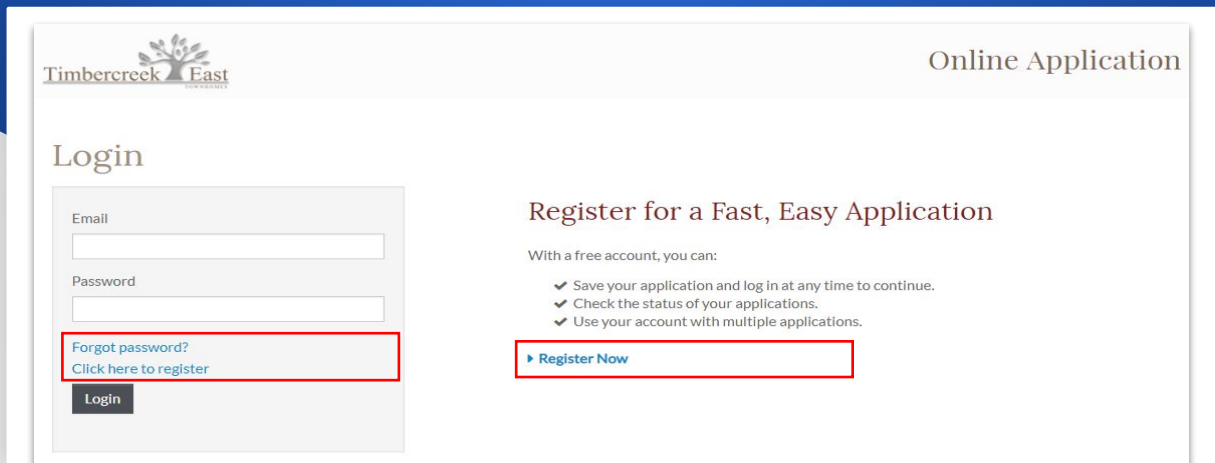


All applications should be completed online via our Property Website.

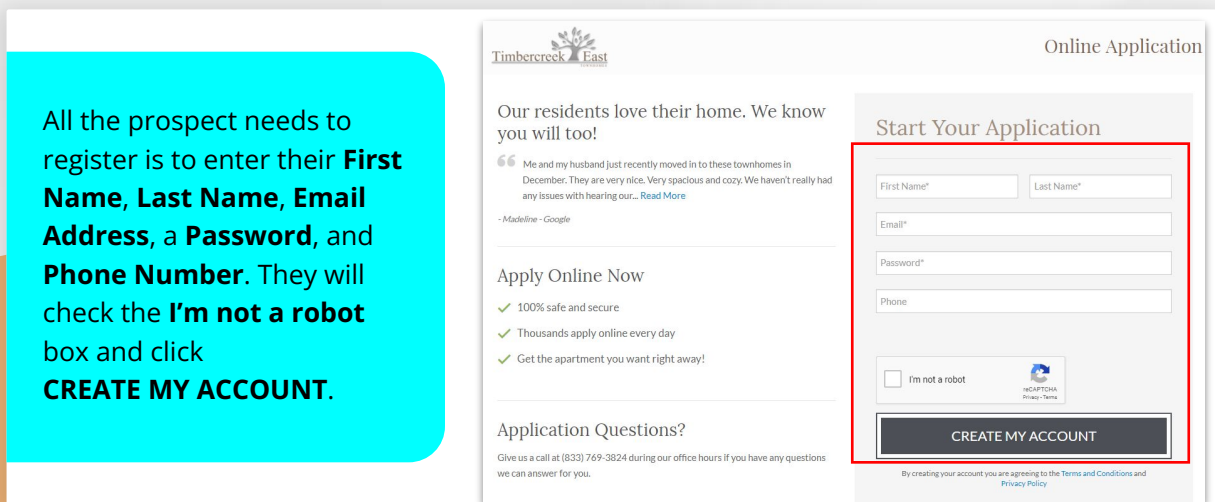
Applicants will click the Applicant Login button on the Property Website.



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.

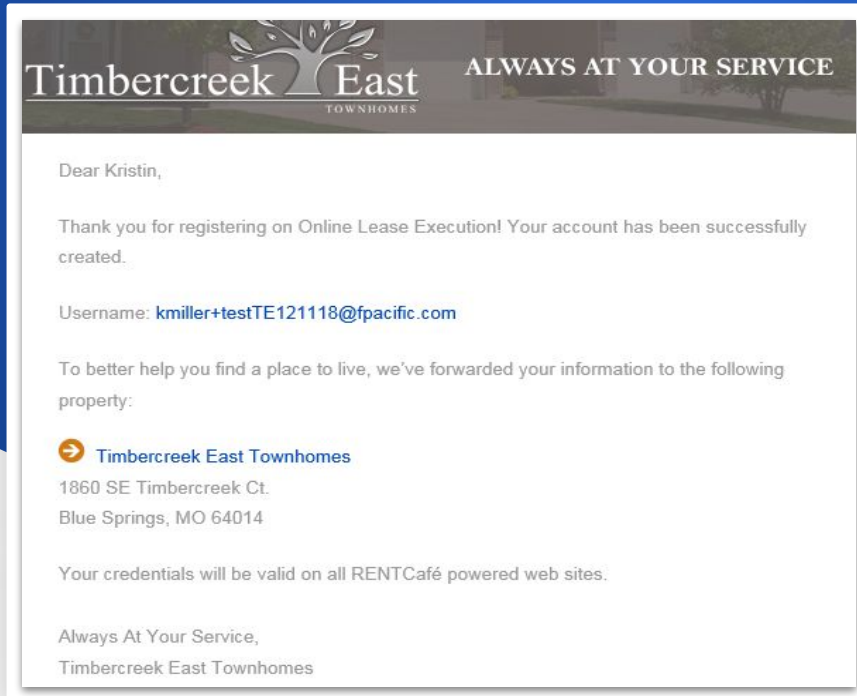


Online Application

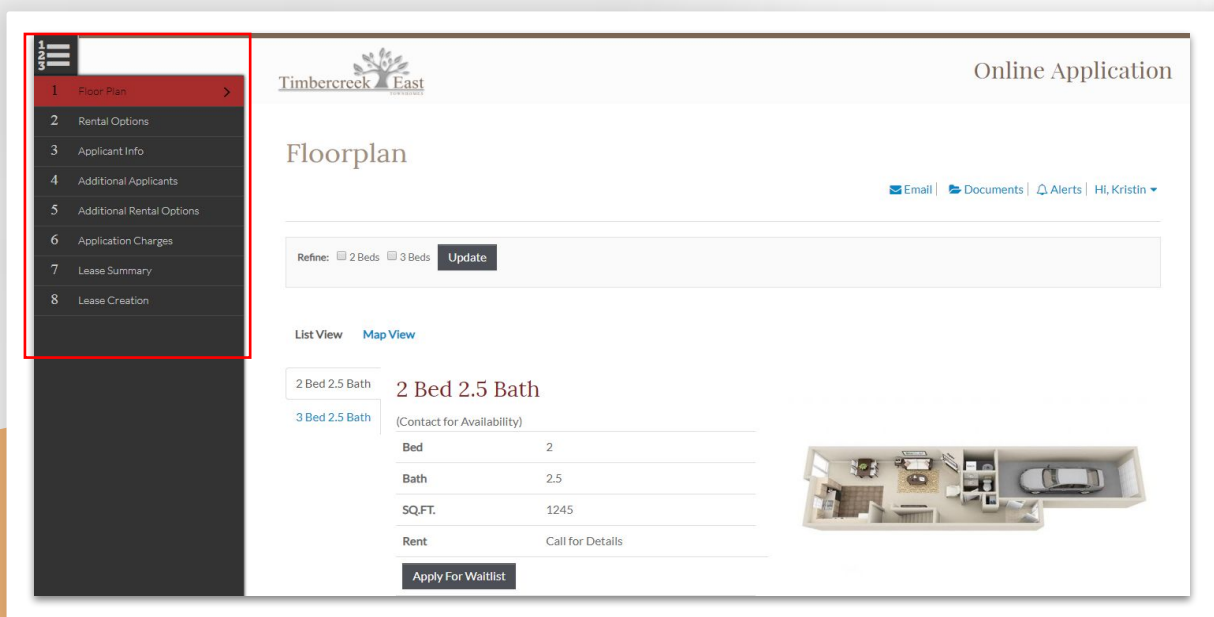


Once the prospect creates their account, they will receive a **User Registration**

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	<input type="button" value="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

Move-in Date: 3/2/2019

Lease Term: 12 months

Current Selection/Best Value

\$1,115^{month}

Includes Trash
[view details](#)

lease term
12 months

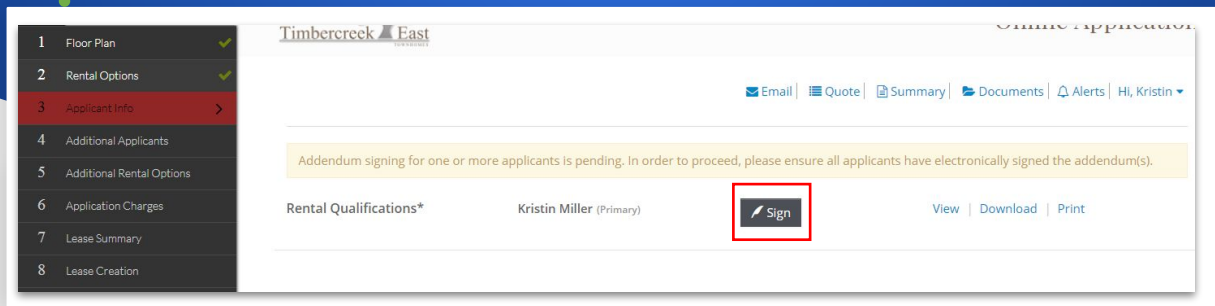
Move-in Date: 3/2/2019

Online Application

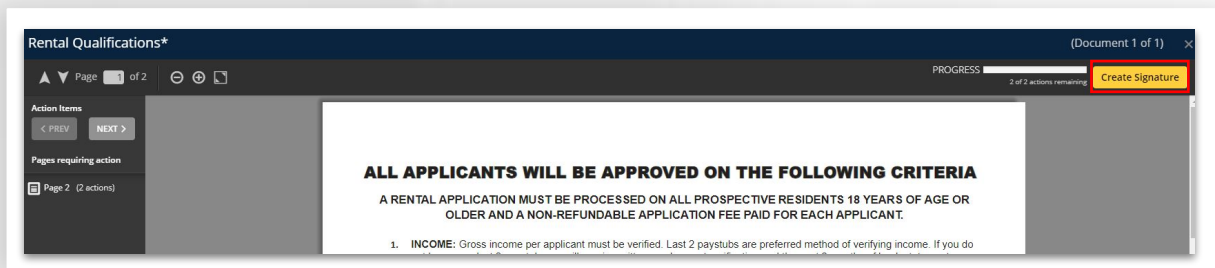


03

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.

Rental Qualifications* (Document 1 of 1)

Page 2 of 2

PROGRESS 2 of 2 actions remaining Edit Signature

Action Items

Pages requiring action

Page 2 (2 actions)

Applicant is required to provide all necessary documentation to process the application within 72 hours. This includes, but is not limited to, proof of income and any credit or criminal discrepancies. If applicant fails to provide all information within the time allotted, the application can be canceled and the townhome held will be released. 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 or cancelled 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 \$350 as an application processing fee and/or as damages.

I HAVE READ THE ABOVE AND UNDERSTAND THE CRITERIA FROM WHICH MY APPLICATION WILL BE APPROVED.

Applicant: Sign Date: Date

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

✓ All required actions complete Submit Document

Applicant is required to provide all necessary documentation to process the application within 72 hours. This includes, but is not limited to, proof of income and any credit or criminal discrepancies. If applicant fails to provide all information within the time allotted, the application can be canceled and the townhome held will be released. 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 or cancelled 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 \$350 as an application processing fee and/or as damages.

I HAVE READ THE ABOVE AND UNDERSTAND THE CRITERIA FROM WHICH MY APPLICATION WILL BE APPROVED.

Applicant: Kristin Miller Date: 12/11/2018

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

3 Applicant Info >

4 Additional Applicants

5 Additional Rental Options

6 Application Charges

7 Lease Summary

Email Quote Summary Documents Alerts Hi, Kristin

Rental Qualifications* Kristin Miller (Primary) Completed View Download Print

Continue

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

* 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.

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
<input type="text" value="John"/>	<input type="text" value="Doe"/>	<input type="text" value="Yes"/>	<input type="text" value="Roommate"/>	<input type="button" value="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
<input type="text" value="John"/>	<input type="text" value="Doe"/>	<input type="text" value="Yes"/>	<input type="text" value="Roommate"/>	<input type="button" value="Save"/>

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

Email Address *	<input type="text" value="kmiller+testTEapp121118@fpa"/>
Re-enter Email Address *	<input type="text" value="kmiller+testTEapp121118@fpa"/>
Message	<input type="text" value="Fill out the application!"/>
<input type="button" value="Cancel"/>	<input type="button" value="Send Email"/>

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 Additional Applicants ✓
5 Additional Rental Options ✓
6 Application Charges >
7 Lease Summary
8 Lease Creation

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 Details

CARD INFORMATION: MASTERCARD VISA DISCOVER

BILLING ADDRESS: Country: United States

Card Number:
Name on the Card:
Exp Date: / (Month / Year)
CVV Code:

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: 816-373-8550
Email: timbercreekeast@tpacific.com


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.

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.

The screenshot shows the Agent Dashboard with a 'Needs Screening/Evaluation' section highlighted in red. The dashboard includes a 'Daily Completion Score' of 78%, a 'Priority (22)' section with 'Applicants (6)' and 'Residents (4)', and a calendar view of events. Below the dashboard is a table of applicants:

Person	Screening Result	Property	Roommates	Roommates Ready For Screening	Dates	Next Step
Adison Cates (applicant)	Accepted	Timbercreek East Townhomes Unit 3764	Davey Brannon	Davey Brannon	Applied: Dec 5, 2024 Move-In: Dec 11, 2024	Evaluate
Rachel Paige (applicant)	Conditional	Cedar Ridge Apartment Homes Unit W04277WU	Steven Easley	Steven Easley	Applied: Nov 24, 2024 Move-In: Dec 2, 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

This screenshot is identical to the previous one, but with a red box highlighting the applicant information in the table below the dashboard.

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.

The screenshot shows the Applicant Profile page for Adison Cates. The 'Screening Report Setup' section includes a table for selecting applicants to include in the report:

Applicant	Type	Consent/Photo ID Confirmed	Include in Report
Adison Cates	Applicant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Davey Brannon	CoApplicant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The 'Screening Report Results' section shows a table with columns for Report, Report Details, Applicants, Date Completed, and Result:

Report	Report Details	Applicants	Date Completed	Result
Yardi Screening	ID: 72326473_1 By: SBO	Adison Cates,Davey Brannon	Dec 5, 2024	Accepted

A 'View Report' button is highlighted in red in the bottom right corner of the results table.

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
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 M JOHNSON
 Also Known As: LEON TERRY JOHNSON
 Date of Birth: 01/22/1950

Primary Address

Address: 40112 018 ST AP 10
 BLUE SPRINGS MO 64014-6610
 Filed: 10/24/2016

Other Addresses

Address: 011011 GREEN ST
 BLUE SPRINGS MO 64015-2613
 Filed: 07/16/2014

Address: 7111 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) Year: _____ County Where Filed: _____ State/Province Where Filed: _____		Yes	No

- 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

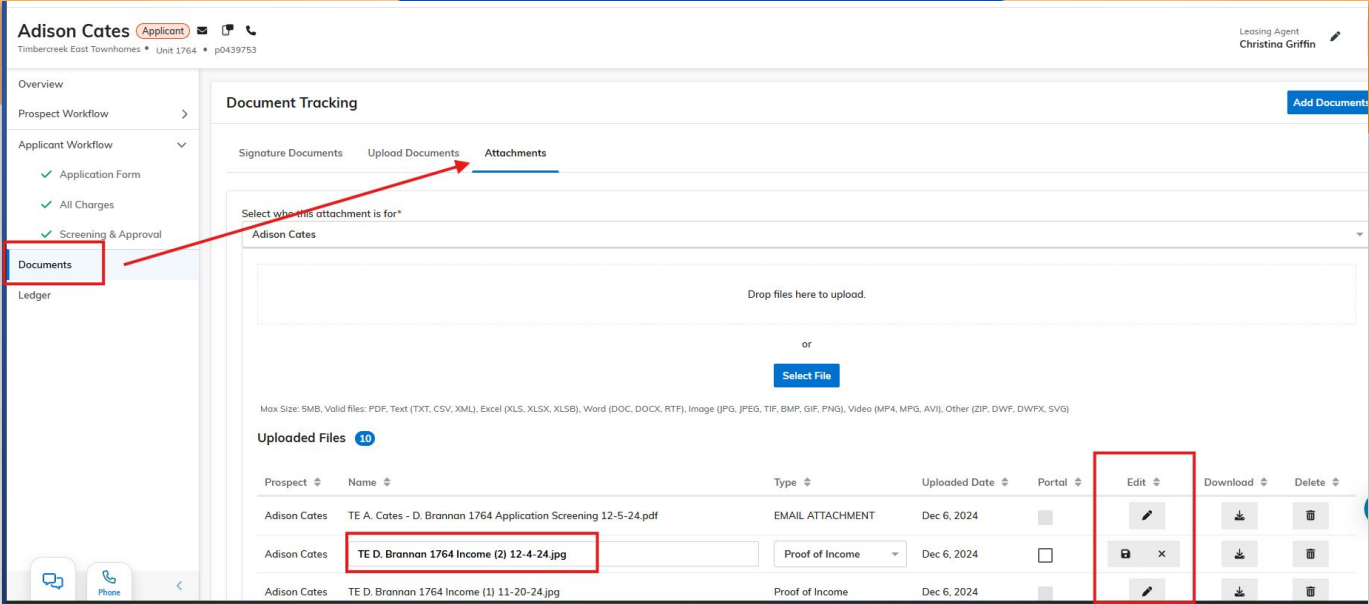
All Documents need to be saved as: Property Code – First initial of First name – Last name – Apt # - Document Type – Date

(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	<input type="checkbox"/>			
Adison Cates	TE D. Brannan 1764 Income (2) 12-4-24.jpg	Proof of Income	Dec 6, 2024	<input type="checkbox"/>			
Adison Cates	TE D. Brannan 1764 Income (1) 11-20-24.jpg	Proof of Income	Dec 6, 2024	<input type="checkbox"/>			



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

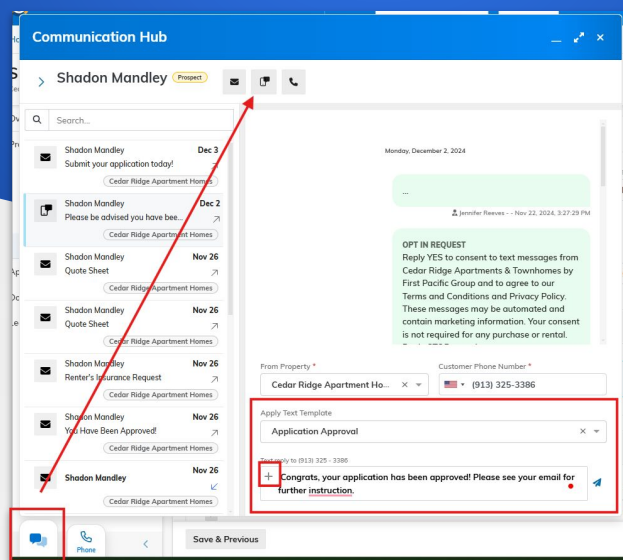
Once approved your applicant will move from Needs Screening/Evaluation to Generate Lease

Person	Property	Roommates	Dates	Lease Status	Next Step
Shadon Mandley (applicant) approved	Cedar Ridge Apartment Homes Unit: WAIT2		Applied: Nov 22, 2024 Move-In: Dec 31, 2024	Pending Finalize Lease	Generate Lease
Brian Markley (applicant) approved	Cedar Ridge Apartment Homes Unit: 15900A	Judy Markley	Applied: Nov 15, 2024 Move-In: Jan 22, 2025	Pending Finalize Lease	Generate Lease
Mark Slaughter Jr (applicant) approved	Cedar Brooke Apartments Unit: WAIT2A		Applied: Oct 7, 2024 Move-In: Jan 5, 2025	Pending Finalize Lease	Generate Lease
Anny Eads (applicant) approved	Cedar Ridge Apartment Homes Unit: WAIT2WB		Applied: Oct 10, 2024 Move-In: Jan 8, 2025	Pending Finalize Lease	Regenerate Lease

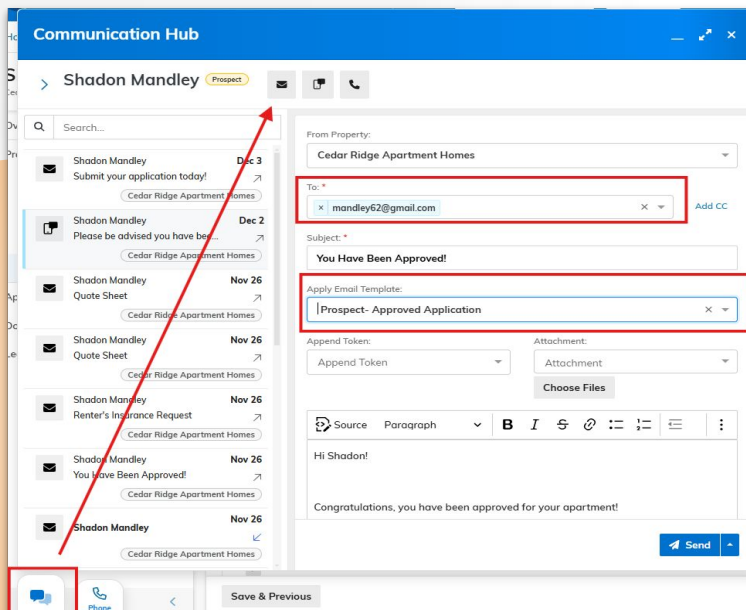
Approval of Application

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. □



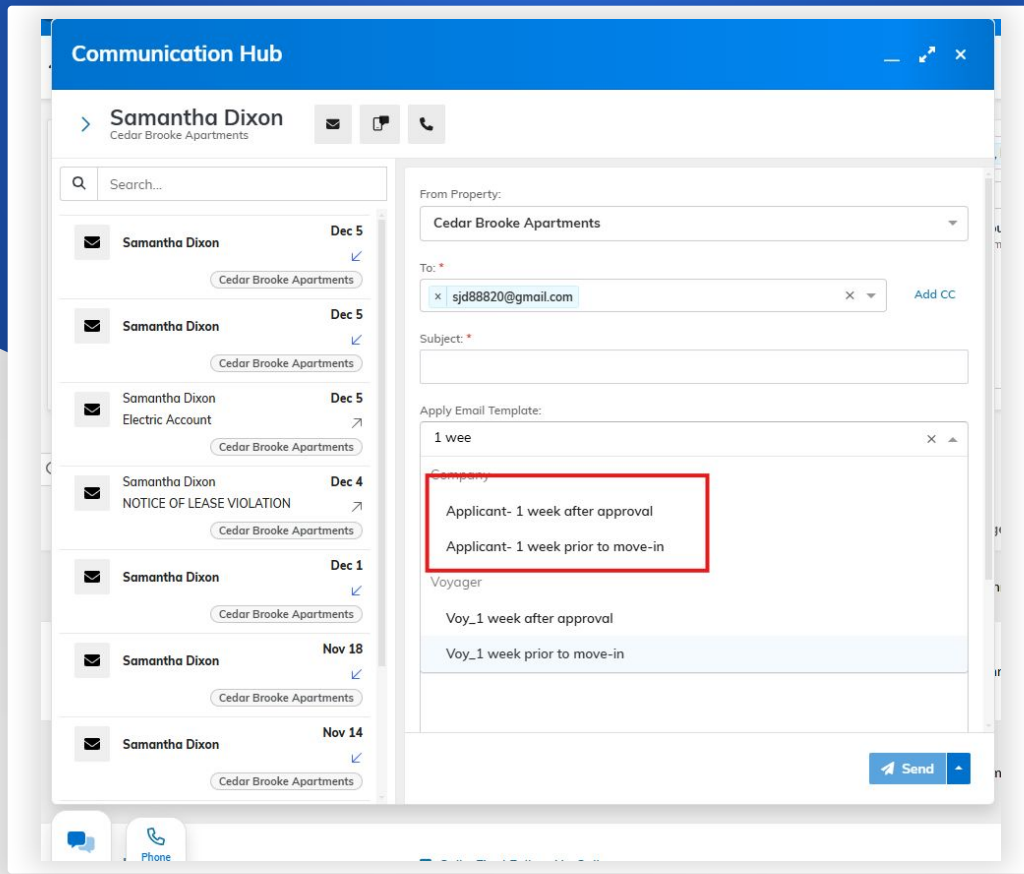
You'll then go to email and send the Prospect- Approved Application Template. Click the com-hub → Email icon → Select the recipient → Click the template drop down → Search or type the template → Wait a few seconds → Preview to make sure no info is needed from you → Send.



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.

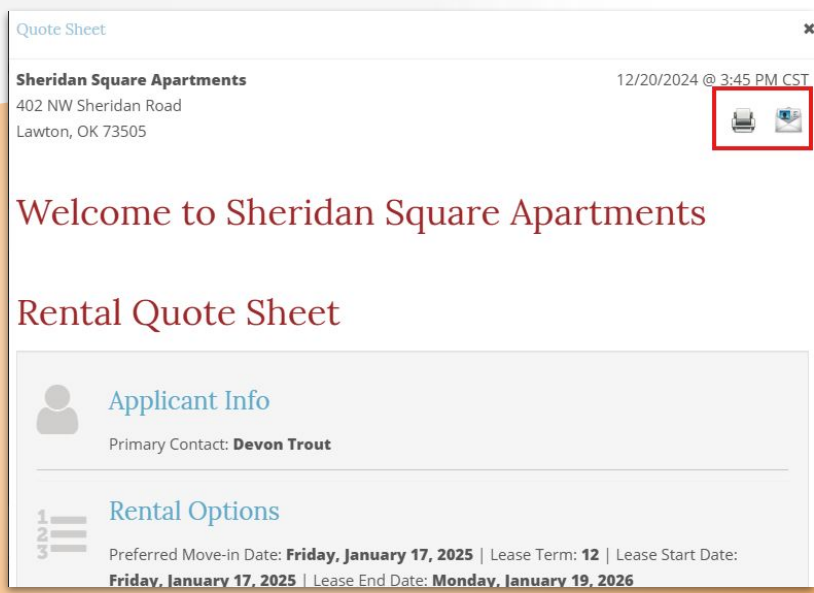
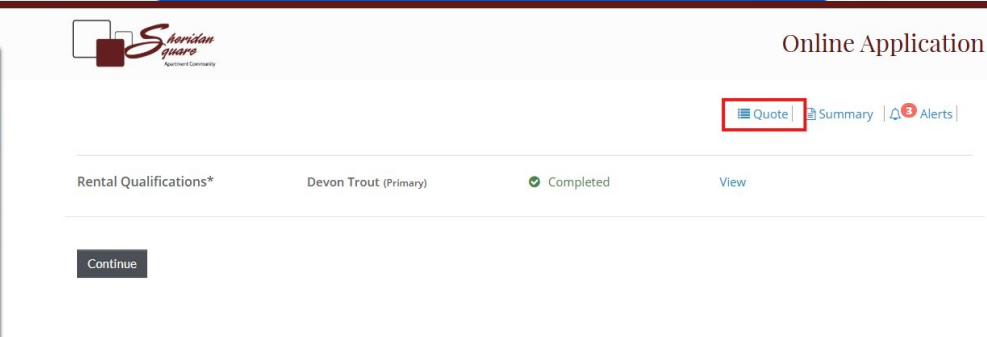
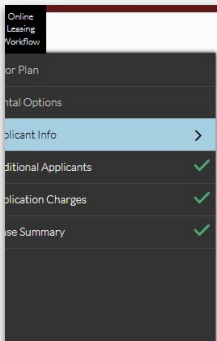
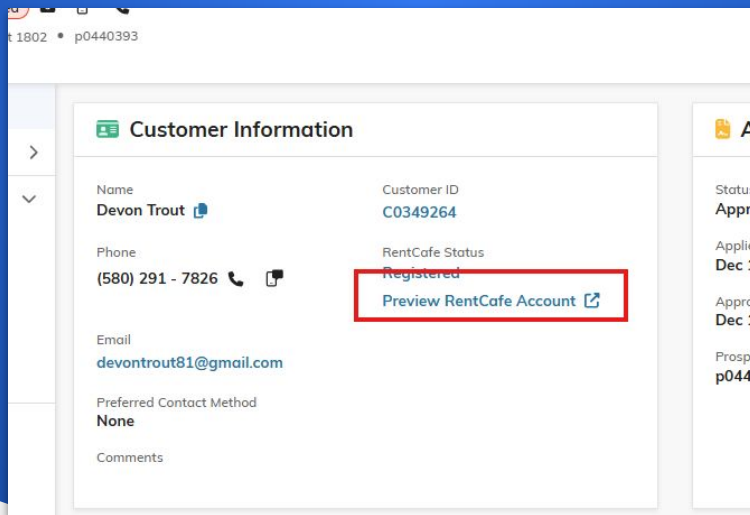


Note: If the applicant is scheduled to move-in asap or within 1 week some follow ups will automatically deactivate themselves.

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.

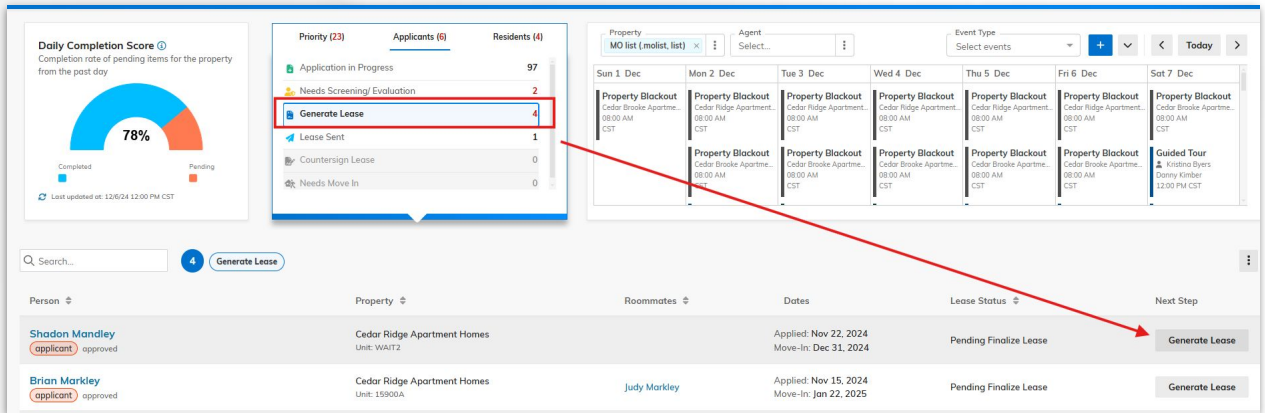


CRM IQ

Lease Generation



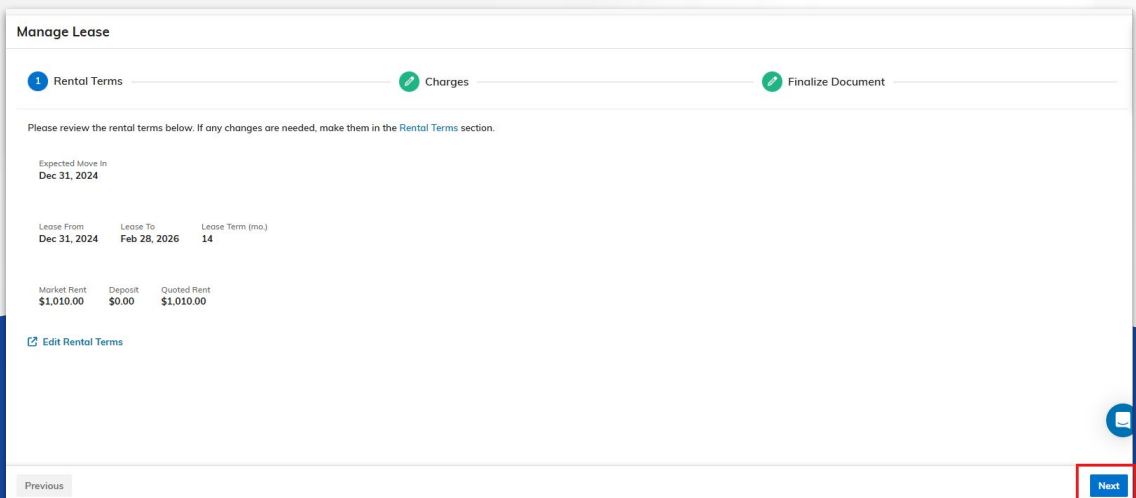
- Once the application has been approved, you will need to generate their lease for them to e-sign. Leasing Specialists do not generate new leases only renewal leases. Note: This may vary by Region. Regional Managers will determine who will generate new leases and renewal leases.
- All lease and move-in 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 with a 'Daily Completion Score' of 78%. A table lists tasks for 'Applicants (6)' and 'Residents (4)', with 'Generate Lease' highlighted. Below, a table of lease events shows 'Generate Lease' buttons for two applicants.

Person	Property	Roommates	Dates	Lease Status	Next Step
Shadon Mandley <small>applicant</small> approved	Cedar Ridge Apartment Homes Unit: WAIT2		Applied: Nov 22, 2024 Move-In: Dec 31, 2024	Pending Finalize Lease	Generate Lease
Brian Markley <small>applicant</small> approved	Cedar Ridge Apartment Homes Unit: 15900A	Judy Markley	Applied: Nov 15, 2024 Move-In: Jan 22, 2025	Pending Finalize Lease	Generate Lease

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.



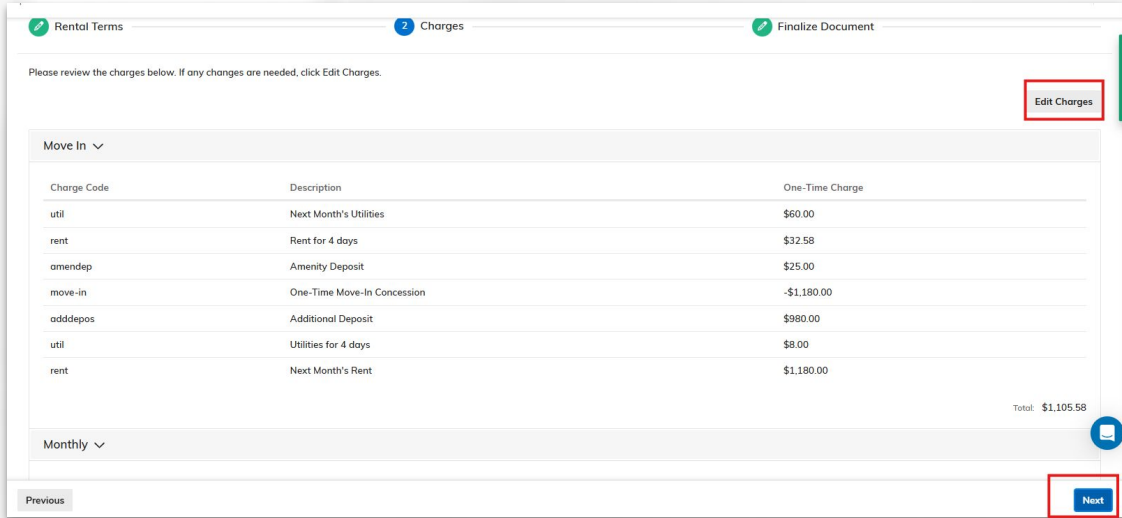
The 'Manage Lease' screen shows a progress bar with 'Rental Terms' selected. Below, it displays lease details: Expected Move In (Dec 31, 2024), Lease From (Dec 31, 2024), Lease To (Feb 28, 2026), Lease Term (14), Market Rent (\$1,010.00), Deposit (\$0.00), and Quoted Rent (\$1,010.00). A red box highlights the 'Next' button at the bottom right.

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 Charges Finalize Document

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

[Edit Charges](#)

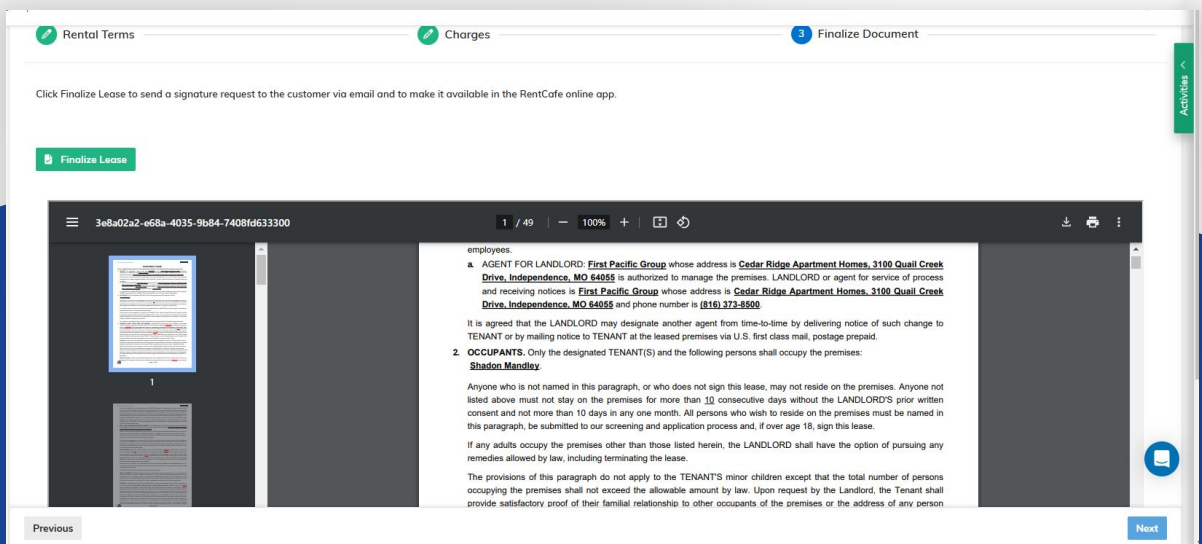
Move In ▾

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 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 / 49 100%

employees:

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.

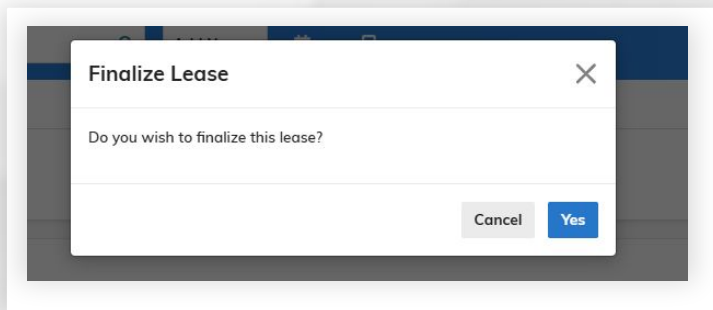
The provisions of this paragraph do not apply to the TENANT'S minor children except that the total number of persons occupying the premises shall not exceed the allowable amount by law. Upon request by the Landlord, the Tenant shall provide satisfactory proof of their familial relationship to other occupants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

[Previous](#) [Next](#)

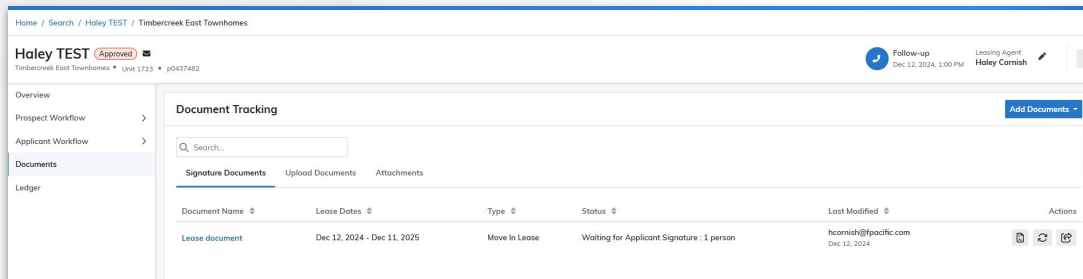
Lease Generation



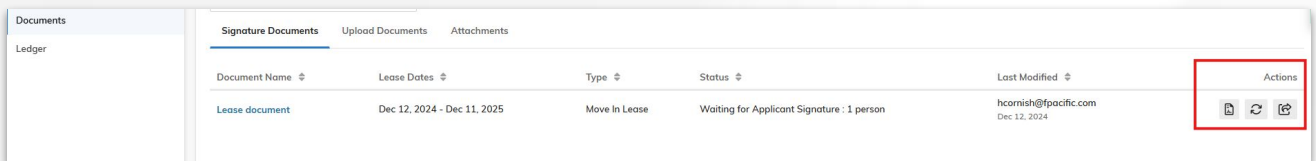
A **Pop-Up Window** will come up asking if you are sure you want to Finalize and generate the lease. Click **Yes**.



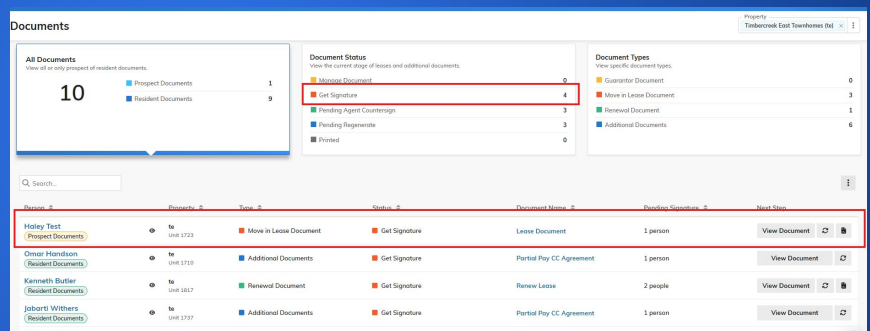
This will send the applicant an email letting them know the lease is ready to be signed. You can view the **Lease Document** by going to the **Documents Dashboard** or **Documents** in the applicants account.



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.

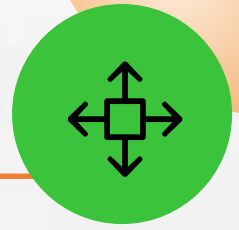
- Guarantor Document: 0
- Move in Lease Document: 25
- Renewal Document: 7
- Additional Documents: 76

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
Anya 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

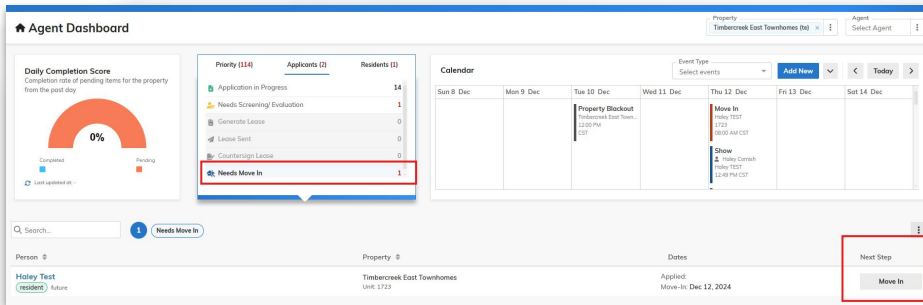
CRM IQ

Move In

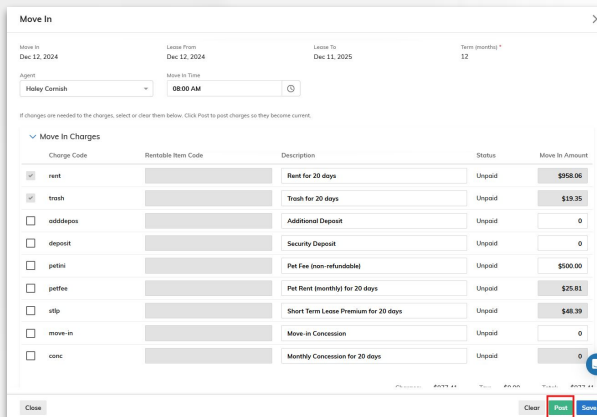


Once the resident has an executed lease, all move in funds are paid and keys are issues, you will need to move them into the system by following the following steps.

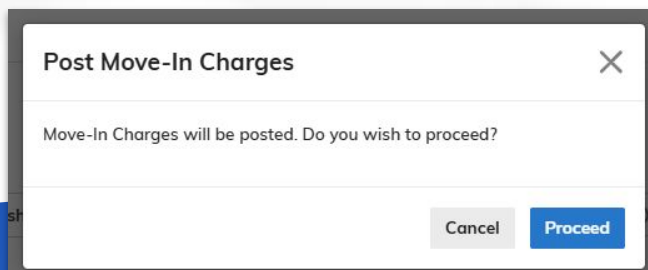
01 | From the Applicant Box go to Needs Move-in. The move-in will show below with the Move In button.



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



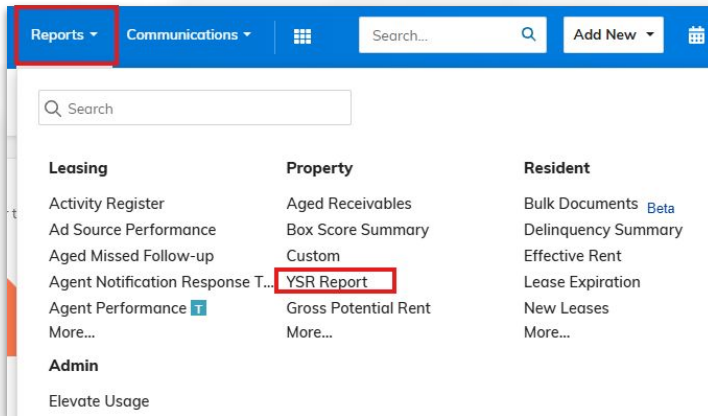
03 | Once you click post a pop up will appear confirming that you are ready to post the charge. Click Proceed and the resident will now be current.



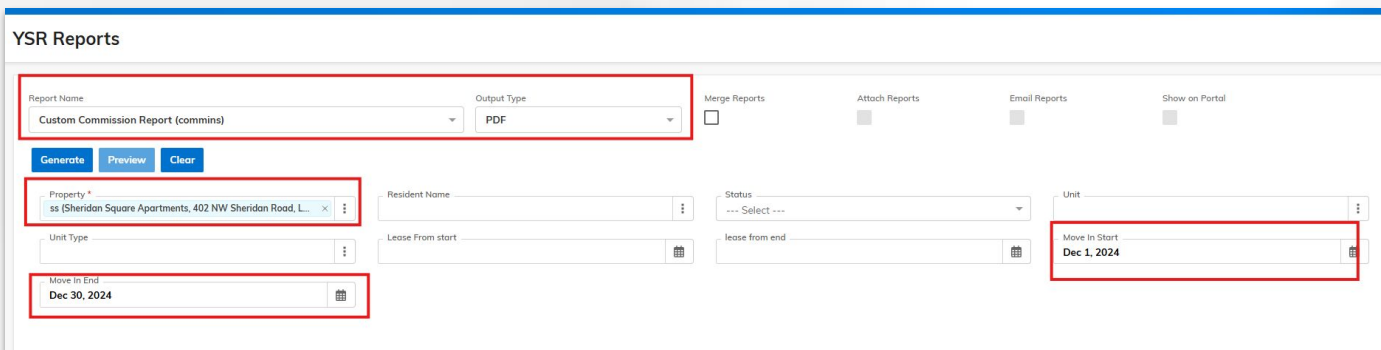
Commission Report

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.

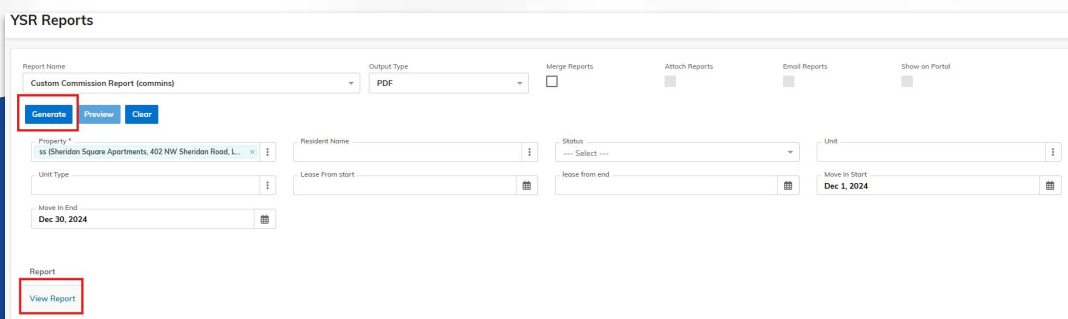
01 | To pull the report click Reports → YSR Report



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.

Agent Dashboard

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

0%

Completed Pending

Last updated at: -

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

Search... **67** Needs Renewal

Customer	Property	Status
Peggy Hayden resident	Cedar Brooke Apartments Unit: 1904	Pending Selection
Kathryn Bobak resident	Cedar Brooke Apartments Unit: 0402	Pending Selection

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.

Renewals Dashboard

Individual Batch Tiered

Expiring Leases
View all customers with leases expiring soon.

Lease Expiration	Count
In Next 30 Days	0
In Next 31-60 Days	4
In Next 61-90 Days	37
In Next 91-120 Days	38
In Next 121-180 Days	76

Proposals
All customers renewal proposals by status.

Status	Count
Pending Proposal	12
Pending Approval	0
Pending Selection	65

Documents
View the status of renewal documents.

Action	Count
Manage Document	0
Pending Customer Signature	7
Pending Agent Countersign	0
Pending Regenerate	0
Printed	0

Scheduled
View renewal leases that have been scheduled.

21 Renewals Scheduled

Search... In Next 91-120 Days

Person	Lease Expiration	Last Contacted	Follow-Ups	Property	Renewal Step	Actions
Gene Jones	Mar 11, 2025	Last Contacted: Jun 4, 2021 Contact Notes:	Due Date: Mar 16, 2025 Description: Thank You Optional Notes: Lease Expire Follow-Up Channel: Email	Cedar Brooke Apartments Unit 0101	View Selections	
Vanisha Francois	Mar 11, 2025	Last Contacted: Mar 8, 2023 Contact Notes: Executed by RENTCafe Site Manager	Due Date: Mar 17, 2025 Description: Thank You	Timbercreek East Townhomes Unit 1746	View Selections	

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	View Proposals	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.

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](#)

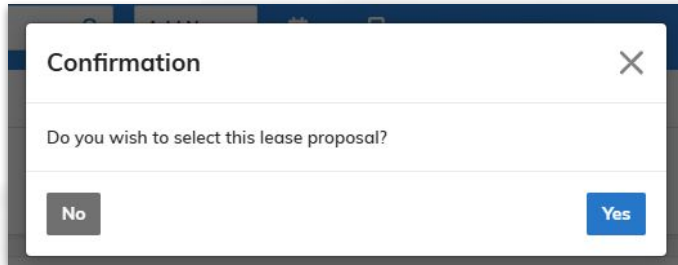
Hide Non-Active Proposals

ID	Proposal Date	Rent	Term	Lease From	LeaseTo	Batch ID	Expiration Date	Status	Details	Available Actions
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.



You then will be able to manage the document.

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.

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	Q	Manage Cancel

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

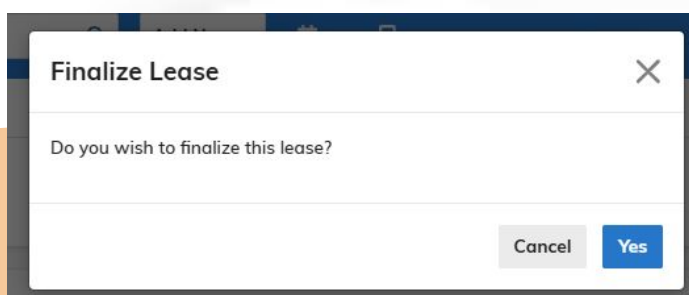
Manage Lease

1 Lease Info | 2 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](#)

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



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)

Individual Batch Tiered

Expiring Leases

View all customers with leases expiring soon.

In Next 30 Days	1
In Next 31-60 Days	4
In Next 61-90 Days	7
In Next 91-120 Days	10
In Next 121-180 Days	10

Proposals

All customers renewal proposals by status.

Pending Proposal	3
Pending Approval	14
Pending Selection	5

Documents

View the status of renewal documents.

Manage Document	0
Pending Customer Signature	2
Pending Agent Countersign	0
Pending Regenerate	0
Printed	0

Scheduled

View renewal leases that have been scheduled.

1

Renewals Scheduled

Search: Pending Customer Signature

Unit	Person	Document Name	Type	Status	Pending Signature	Next Step
1723	Haley Test	Renew Lease	Renewal Document	Get Signature	1 person	View Document

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)

All Documents

View all or only prospect of resident documents.

850

Prospect Documents	487
Resident Documents	363

Document Status

View the current stage of leases and additional documents.

Manage Document	35
Get Signature	617
Pending Agent Countersign	15
Pending Regenerate	188
Printed	0

Document Types

View specific document types.

Guarantor Document	0
Move in Lease Document	219
Renewal Document	63
Additional Documents	568

Search: Pending Agent Countersign

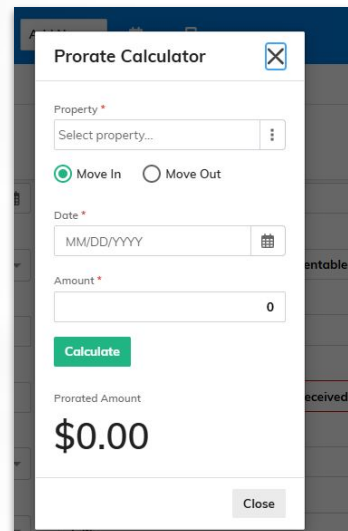
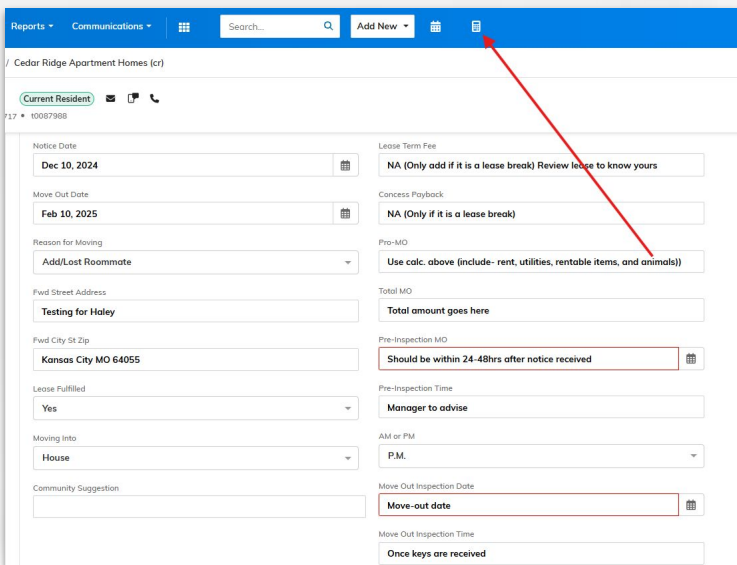
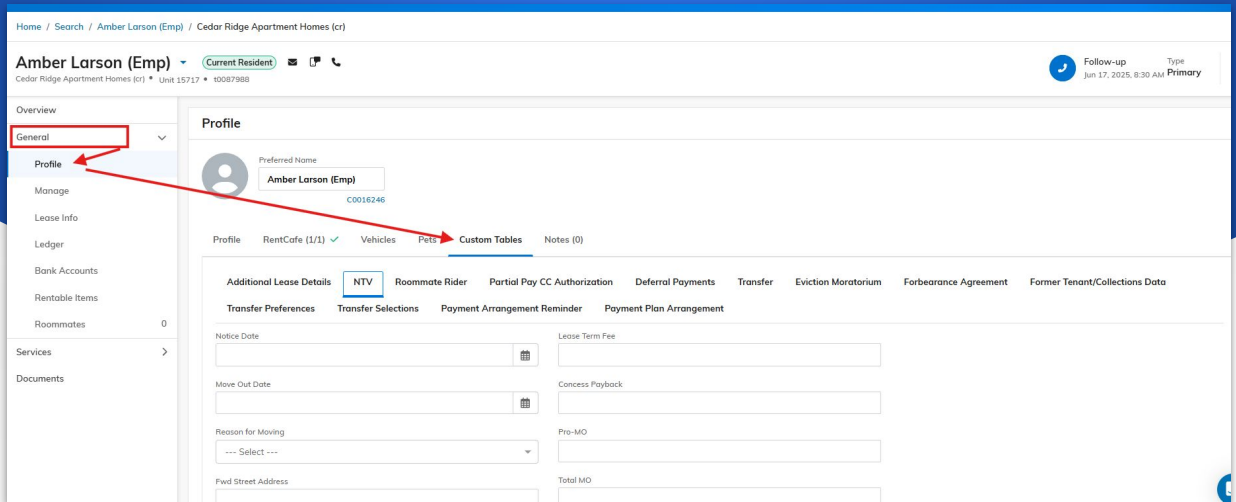
Selected	Person	Property	Type	Status	Document Name	Pending Signature	Next Step
<input type="checkbox"/>	Jeremiah Stevenson <small>Prospect Documents</small>	eb Unit 11-73438	Move in Lease Document	Pending Agent Countersign	Lease Document		Countersign
<input type="checkbox"/>	Liyah Arizola <small>Prospect Documents</small>	to Unit 08981D	Move in Lease Document	Pending Agent Countersign	Lease Document		Countersign
<input type="checkbox"/>	Madelynn Bursley <small>Resident Documents</small>	ar Unit 30522E	Additional Documents	Pending Agent Countersign	Notice to Vacate		Countersign
<input type="checkbox"/>	Chance Trambley* <small>Resident Documents</small>	If Unit 06-305	Renewal Document	Pending Agent Countersign	Renew Lease		Countersign

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

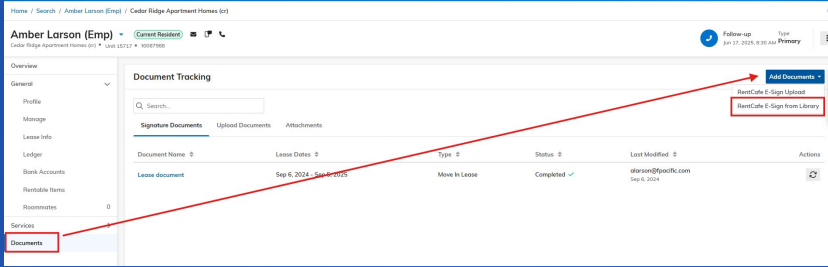
By default, you land on the Overview section of the **Resident** screen. Click General in the menu → Profile → Custom Tables→ Select NTV → Fill in the information → Once complete hit Save.



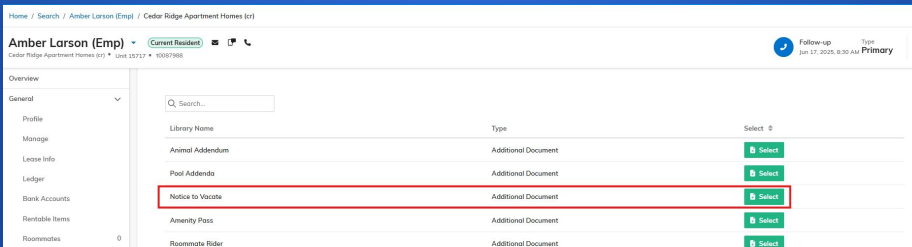
NOTICE TO VACATE



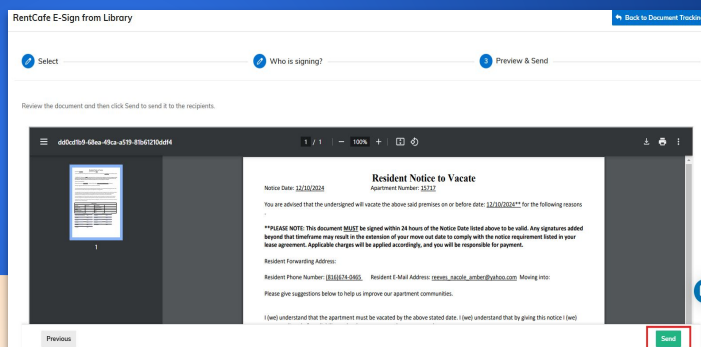
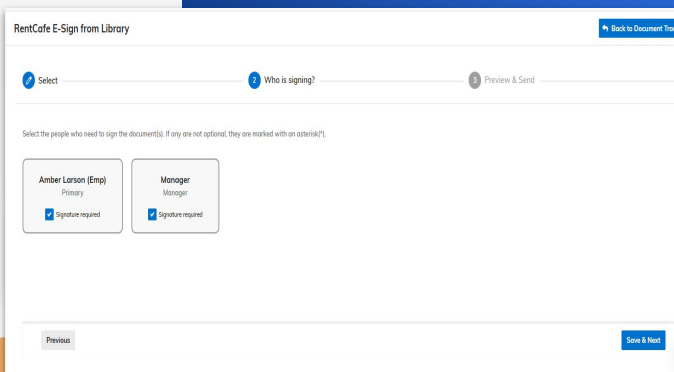
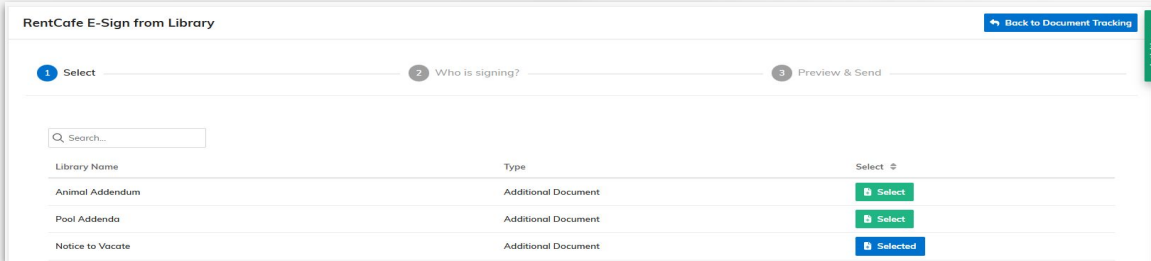
To send the document on the left hand menu click Documents → Add Documents → RentCafe E-Sign from Library.



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 Type Primary

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

Overview 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 36

Resident	Name	Type	Uploaded Date	Portal	Edit	Preview	Download	Delete
Marquis White	MO1stDemandForRent_t0086581_12052024.pdf		Dec 5, 2024					
Marquis White	Attachment_t0086581_RS_Nov222024110728.pdf	Insurance Documents	Nov 22, 2024	<input checked="" type="checkbox"/>				
Marquis White	Attachment_t0086581_RS_Nov162024110949.pdf	Insurance Documents	Nov 16, 2024	<input checked="" type="checkbox"/>				
Marquis White	Attachment_t0086581_NoticetoVacate_Nov112024113200.pdf	Portal Lease Documents	Nov 11, 2024	<input checked="" type="checkbox"/>				
Marquis White	CR White 5900A NTV 11.9.24	Move Out Statement	Nov 9, 2024					
Marquis White	TCForbearanceAgreementLetter_t0086581_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 Type Primary

Cedar Ridge Apartment Homes (cr) • Unit 15717 • 6087988

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

Overview Manage

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	

Manage

- 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 ▾

Cedar Ridge Apartment Homes (cr) • Unit 15900A • t0086581

Notice Resident
✉
📄
📞

Overview

General >

Services >

Documents

Customer Information

Name	Customer ID
Marquis White	C0229664

Resident Status

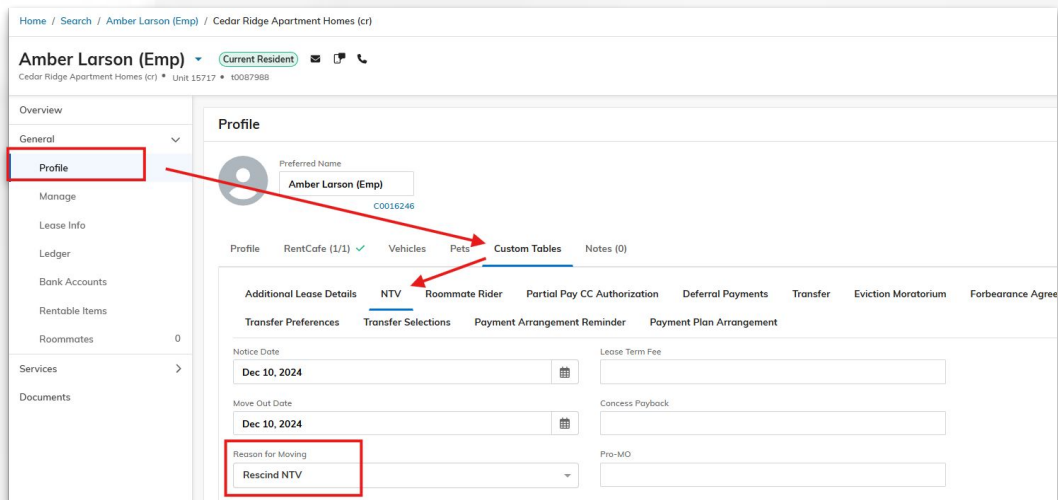
Status	Ledger Balance
Notice	\$1,344.00

	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

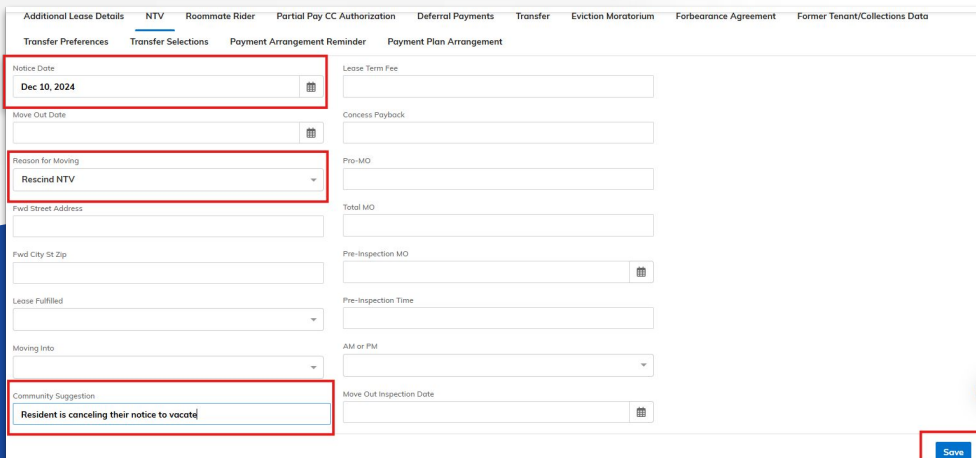
If a Resident notifies you that they would like to cancel their Notice to Vacate, you will need to regenerate the NTV form for them to sign to rescind their notice.

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



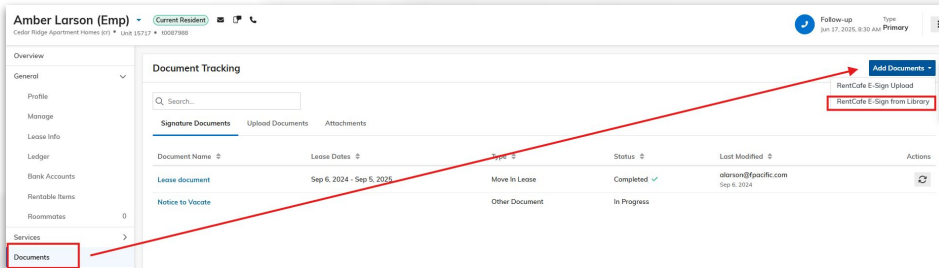
You will notice all of the old information is still populated into the **Filter** fields. These will need to be cleared out and only the **Date**, **Reason for Moving** and **Community Suggestion** will be filled out with the following information.

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

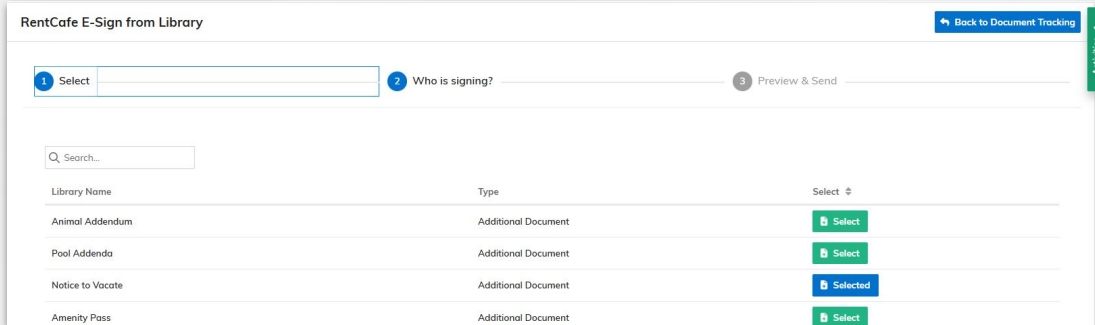


Cancelling A Notice to Vacate

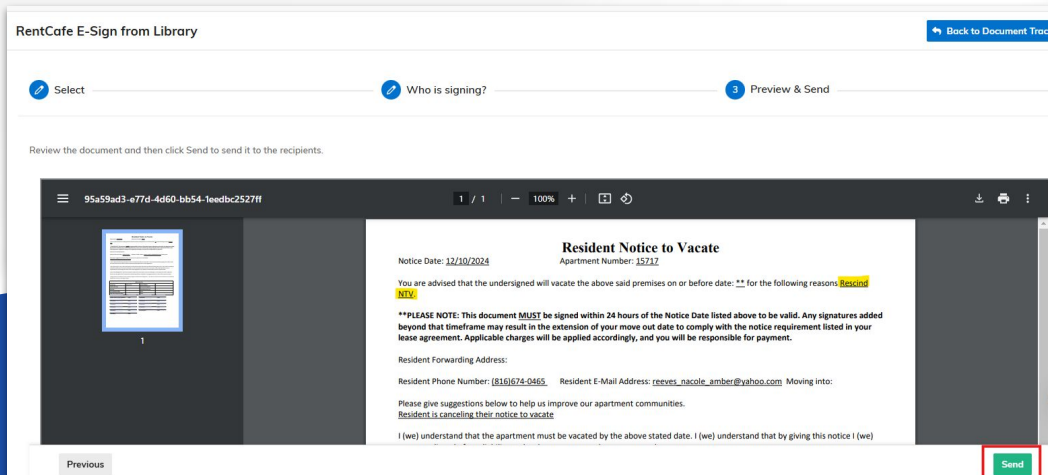
After Saving the info go to Documents → Add Documents → RentCafe E-Sign from Library



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.

The screenshot shows the CRM interface for a resident named Marquis White. The left sidebar has a 'General' dropdown menu with 'Manage' selected. A red arrow points from 'Manage' in the sidebar to a 'Manage' button in the top right of the main content area. Below this button is a table of notices.

Date	Action	Notes	Agent
Nov 14, 2024	Notice Given	Unhappy	Amber Larson
Jan 11, 2024	Move In	Move In	Kristal Ruelas

A dropdown menu is open from the 'Manage' button, showing options: Apply Deposit, **Cancel Notice**, Deposit Accounting, Move Out, Promote Roommate, and Unit Transfer. The 'Cancel Notice' option is highlighted with a red box.

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

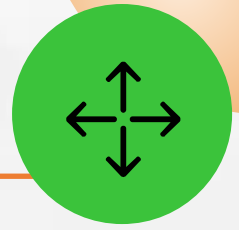
The 'Cancel Notice' modal form contains the following fields:

- Termination Type: Notice
- Notice Date: Nov 9, 2024
- Move Out Date: Jan 13, 2025
- Reason for Move Out: Unhappy
- Agent: Select Agent (with a dropdown arrow)

A red box highlights the 'Agent' field. At the bottom right of the modal, there is a 'Cancel Notice' button, also highlighted with a red box. A 'Close' button is located at the bottom left.

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

Property: Timbercreek East Townhomes (te) | Agent: Select Agent

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

Calendar

Event Type: Select events | Add New

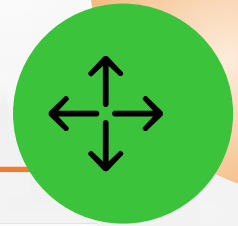
Sun 8 Dec	Mon 9 Dec	Tue 10 Dec	Wed 11 Dec	Thu 12 Dec	Fri 13 Dec	Sat 14 Dec
		Property Blackout Timbercreek East Town... 12:00 PM - 1:00 PM EST		Move Out Haley TEST 1723 08:00 AM CST		
				Notice Haley TEST 1723 09:00 AM CST		

Search: [] **2 Needs Move Out**

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

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

Phone

Email
TESTINGAPP@GMAIL.COM

Preferred Contact Method
None

Customer ID
C0342929

RentCafe Status
Registered

[Preview RentCafe Account](#)

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: 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 • 50087988

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 [Preview RentCafe Account](#)

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

Vehicles: 0 Add Prospect ID: p0432387

Roommates: 0 **None Add** Pets: 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: Last Name: Phone: Email:

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	hyncicrnsh@gmail.com	Add as Roommate
Haley Cornish ✓	(567) 843 - 9209	test123test456test@gmail.com	Add as Roommate

New Roommate

* indicates required fields

First Name *

Last Name *

Email

Relationship *
 This field is required.

Cell Phone

Lessee

Move In Date *
 Invalid date format.

Date of Birth

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 ⋮	

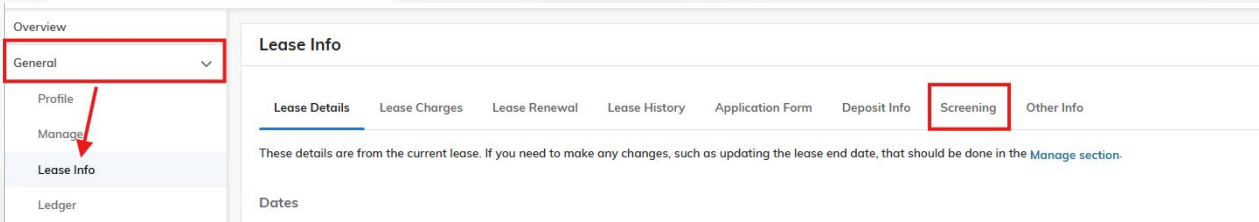
Once the roommate completes the online application and pays, you will manually process screening. Once Approved, you will utilize the Roommate Rider Agreement to generate the Additional Roommate to the lease.

CRM IQ

Screening Manually



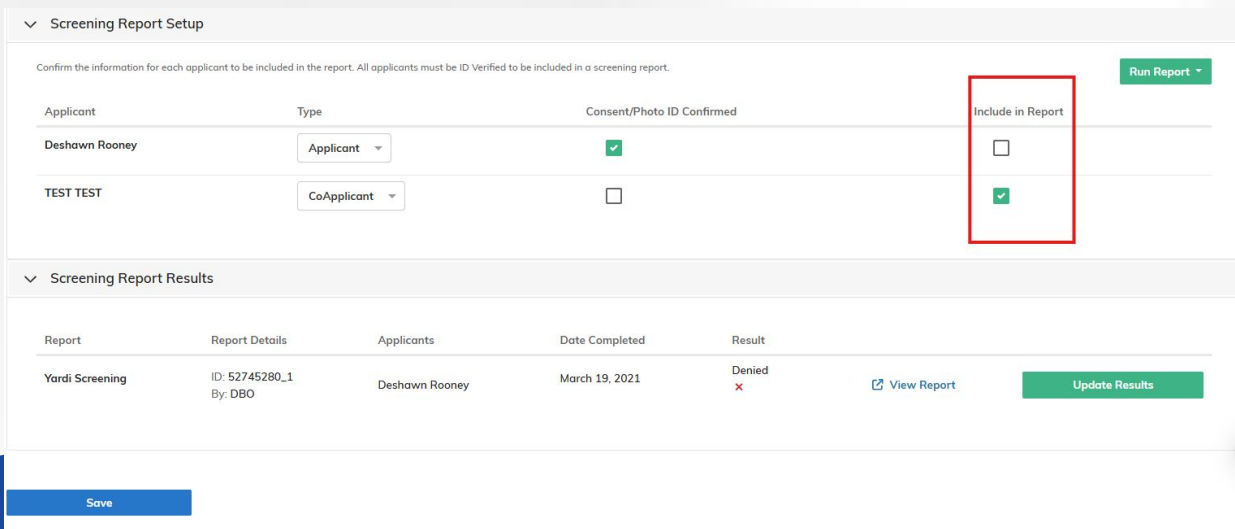
Once the new roommate has completed the online application, you will go to the Resident's **Profile** screen and click General → Lease info → Screening



The screenshot shows the CRM IQ interface. On the left, the 'Overview' menu is expanded to 'General'. A red box highlights the 'General' dropdown, and a red arrow points to the 'Lease Info' option. The main content area shows the 'Lease Info' section with tabs for 'Lease Details', 'Lease Charges', 'Lease Renewal', 'Lease History', 'Application Form', 'Deposit Info', 'Screening', and 'Other Info'. The 'Screening' tab is highlighted with a red box. Below the tabs, there is a note: '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.'

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.



The screenshot shows the 'Screening Report Setup' and 'Screening Report Results' sections. The 'Screening Report Setup' section has a 'Run Report' button. Below it is a table with columns: Applicant, Type, Consent/Photo ID Confirmed, and Include in Report. The 'Include in Report' column has checkboxes for each applicant. The 'Screening Report Results' section has a table with columns: Report, Report Details, Applicants, Date Completed, and Result. The 'Result' column shows 'Denied' with a red 'x' icon. There are 'View Report' and 'Update Results' buttons.

Applicant	Type	Consent/Photo ID Confirmed	Include in Report
Deshawn Rooney	Applicant	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TEST TEST	CoApplicant	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

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 ▼	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yardi Screening
TEST TEST	CoApplicant ▼	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other Criminal Guarantor

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

Screening Login - Yardi Resident Screening 👤 Applicants

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

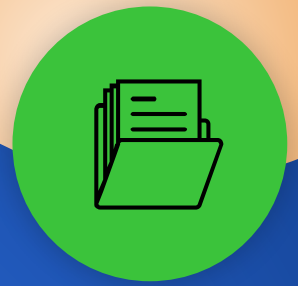
APPLICATION RESULT: ACCEPT WITH CONDITIONS - GUARANTOR

[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.

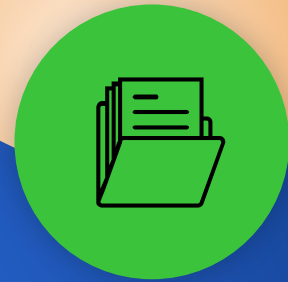
All remaining leaseholders must submit their 2 most recent pay stubs to confirm they qualify to remain in the unit.

- 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.

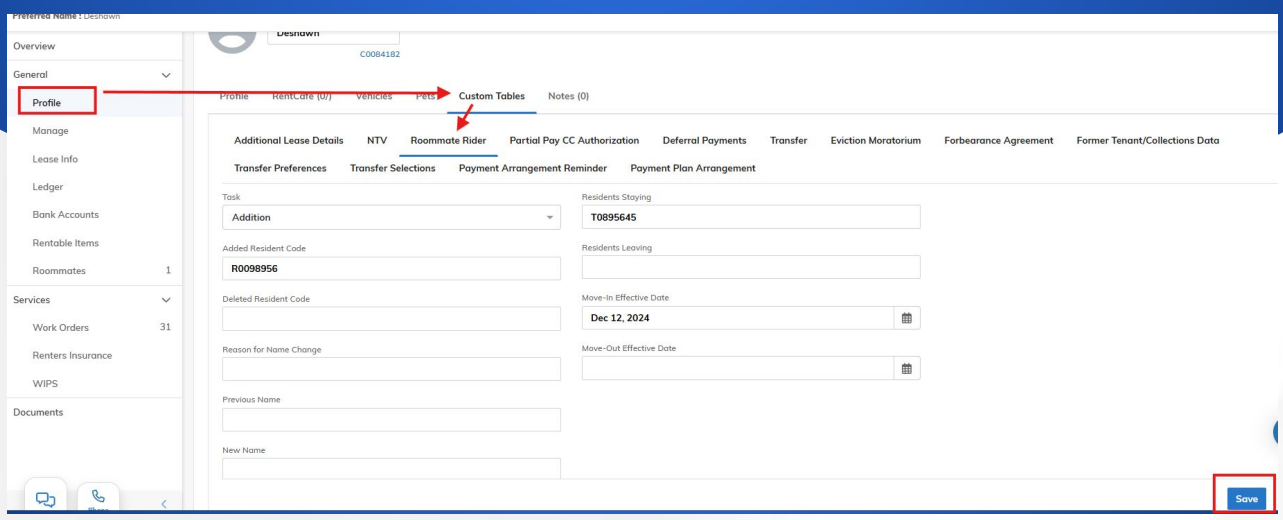
Once approved by Ruanne, your manager will generate the Roommate Rider.

- 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.

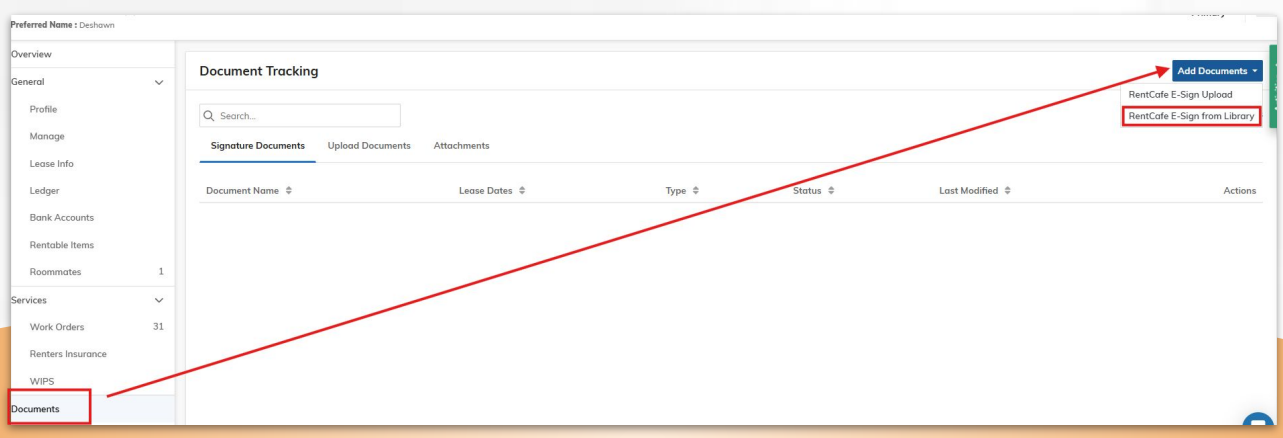


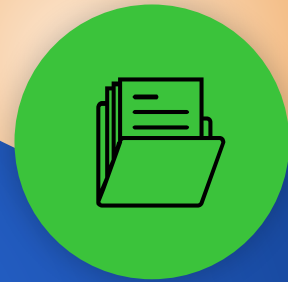
Roommate Rider

- 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



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





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

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	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%

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

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.

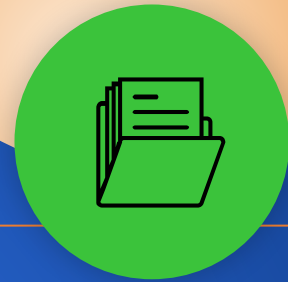
Residents will pick up keys on a Friday and their new lease will take effect that day. They will be set up as a Transfer within Yardi and the move out date will be set for Sunday (i.e. pick up keys and lease effective 12/13/24, Move out set for 12/15/24). Keys must be turned in by 9am on Monday (i.e. 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 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

Profile

Preferred Name: Simon Korec
 CO324566

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

Document Tracking

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

Documents

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

Select

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% +
📄 🖨

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.**
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- 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	Unit	Intended Move-Out Date *	Notice of Transfer Date *
Timbercreek East Townhomes (te)	1724 (Timbercreek East Townhomes - 2 bedroom townhome)	Dec 16, 2024	Dec 16, 2024

Transfer Reason *

Need More/Less Space

New Move In

To Property *	To Unit *	Move In Date *
Timbercreek East Townho...	1846 (Timbercreek East T...	Dec 16, 2024

New Lease Term

From Date *	Term *	To Date *
Dec 16, 2024	12	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.



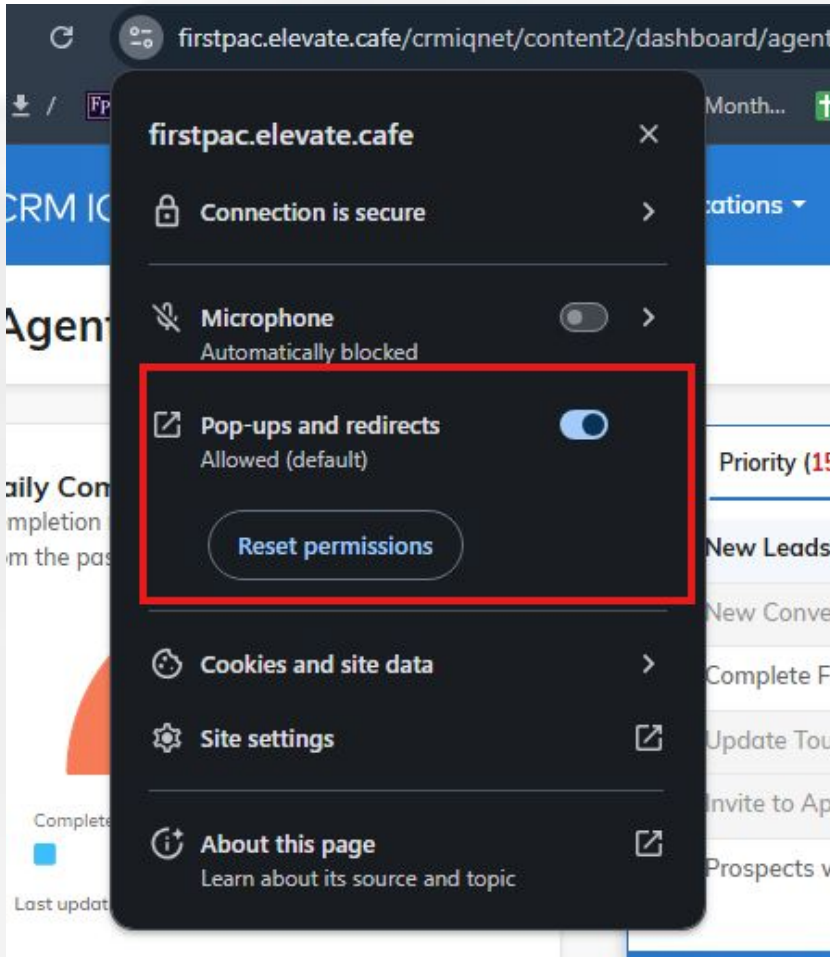
If you want to change the Unit or edit any of the transfer options, you must click Finish for all changes to be saved.

The screenshot displays the 'Agent Dashboard' for the property 'Timbercreek East Townhomes (te)'. It features a 'Daily Completion Score' of 0%, a list of tasks for 'Priority (28)', 'Applicants (2)', and 'Residents (3)'. The 'Needs Move In' task is highlighted with a red box. A calendar shows a 'Move In' event for Simon Korec on Mon 16 Dec at 08:00 AM CST and a 'Move Out' event on Tue 17 Dec at 08:00 AM CST. A 'Needs Move In' notification is also present. At the bottom, a summary card for Simon Korec shows the property as 'Timbercreek East Townhomes Unit: 1846' and the move-in date as 'Dec 16, 2024'. A red box highlights the 'Needs Move In' status and the 'Move In' button.

CRM IQ Pop ups

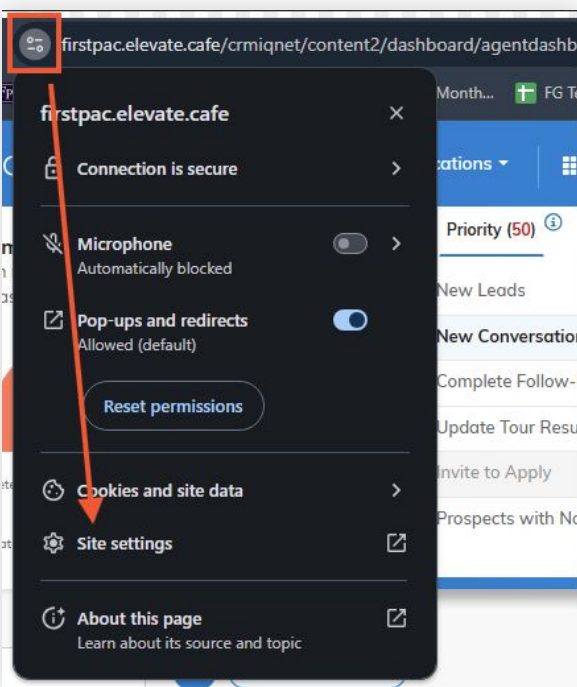


Make sure to click Allow anytime a pop up notification pops up. This will allow you to receive phone calls, texts, see info for updates, etc.

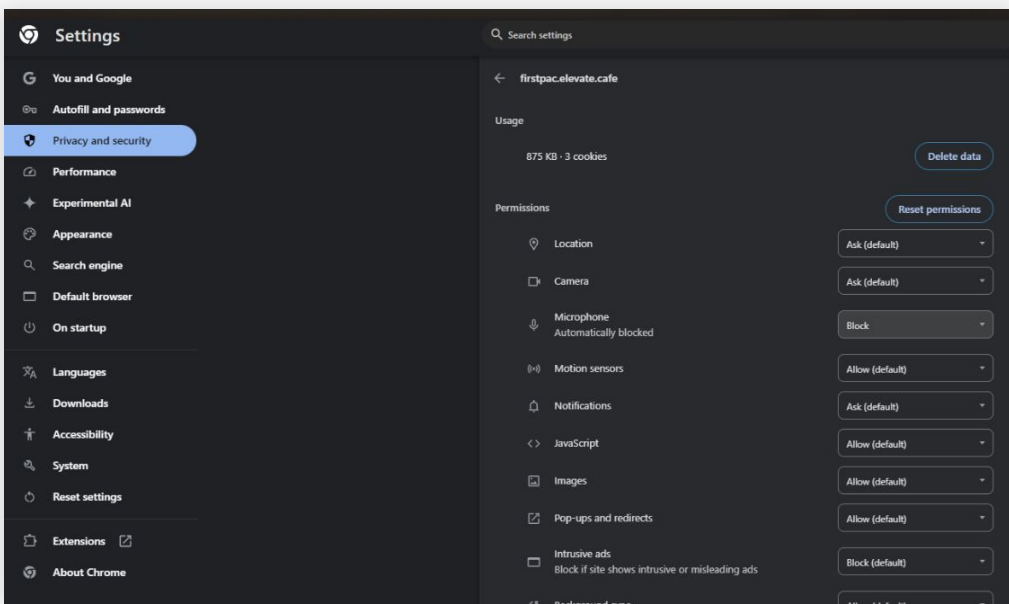


CRM IQ

Screening Pop Up



Click View Site Information icons in the top left-hand corner of the search bar and then click site settings



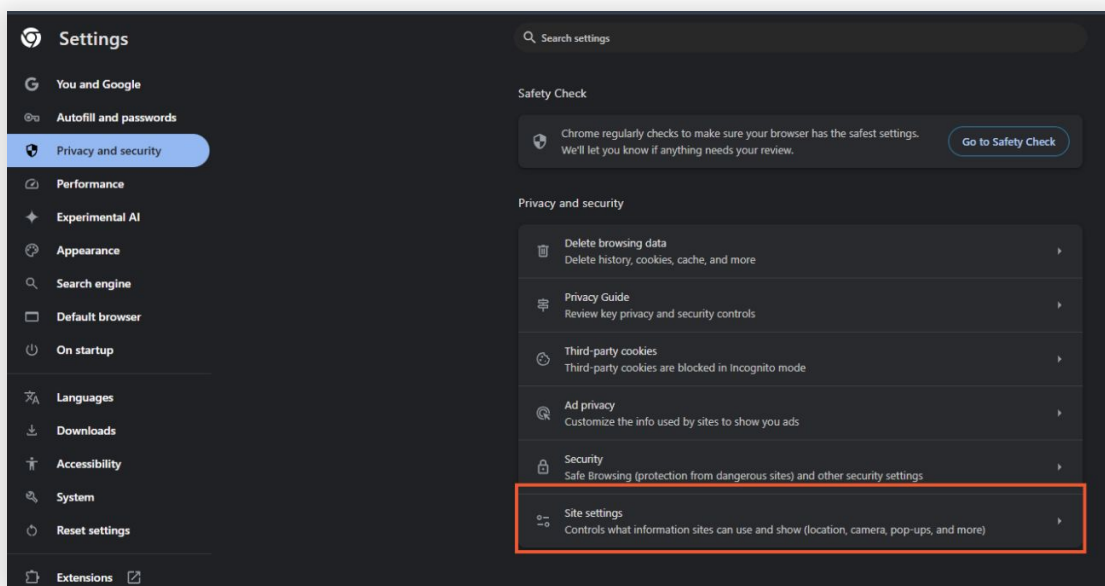
Although it says its on Privacy and security click it again.

CRM IQ

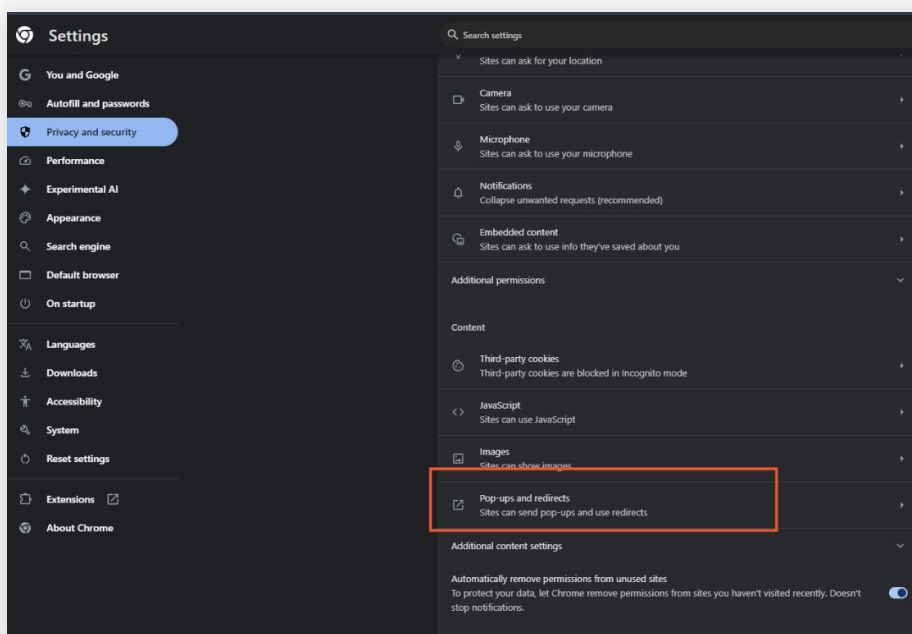
Screening Pop Up



It should look like this and then click Site Settings



Scroll down to Pop-ups and redirects

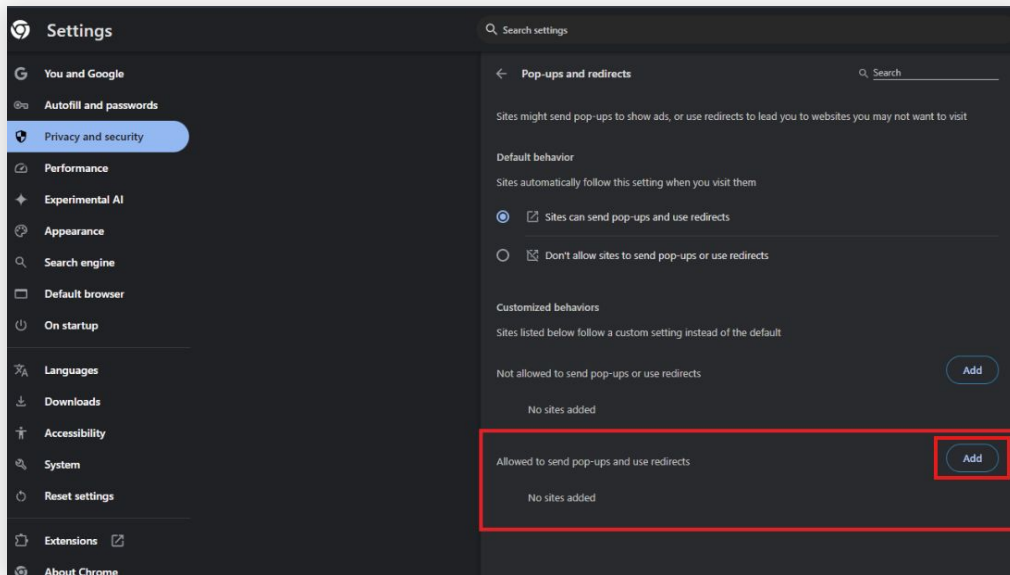


CRM IQ

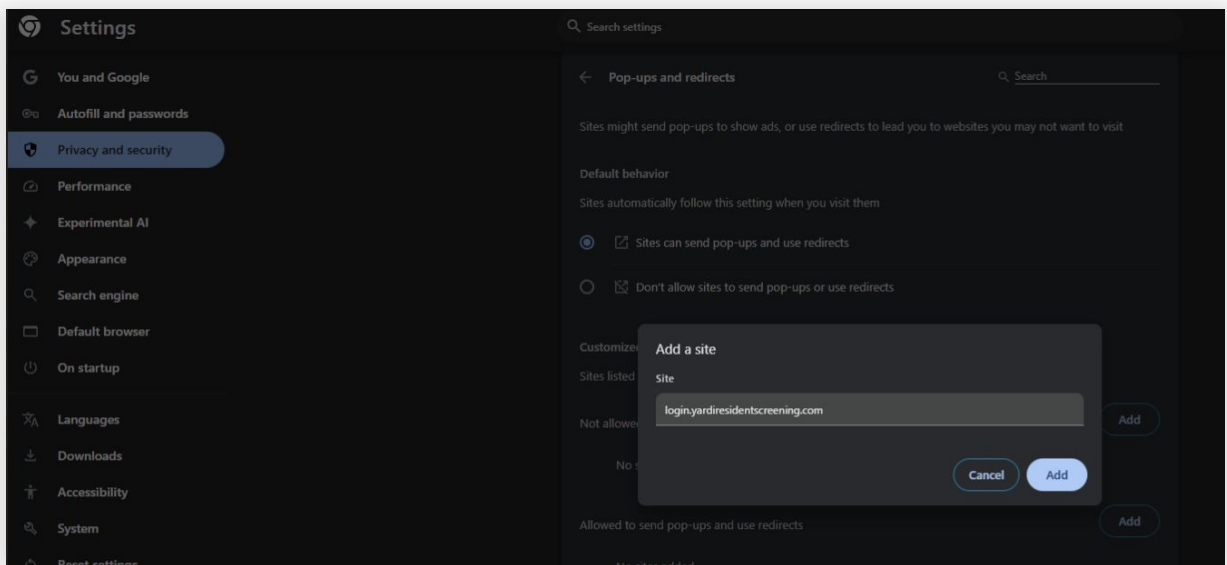
Screening Pop Up



Under Allowed to send pop-ups and use redirects click Add



Paste this link into the box and click add. Link: login.yardresidentscreening.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 **Submit**


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

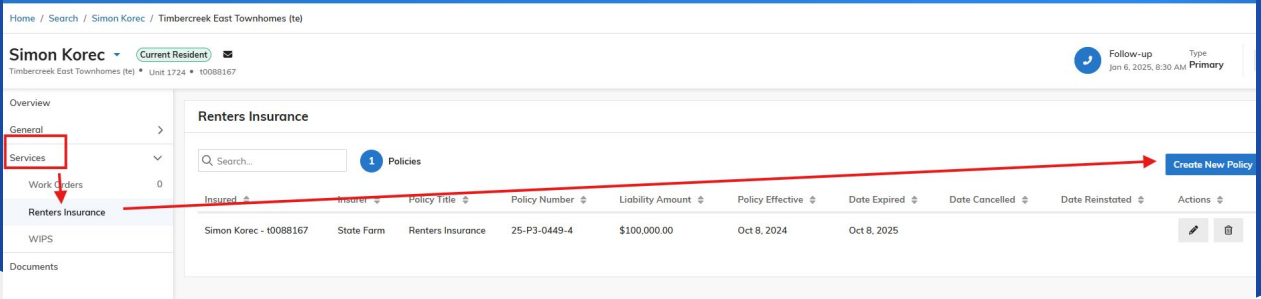
BULLETIN BOARD

Write a message to your neighbors

Post Message

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.

The form is titled 'New Renters Insurance Policy Information'. It contains the following fields and options:

- Name: Simon Korec - t0088167 (dropdown)
- Insurer * (required): [text input]
- Policy Begins * (required): [calendar icon]
- Policy Title: [text input]
- Policy Ends * (required): [calendar icon]
- Policy Number * (required): [text input]
- Policy Cancelled: [calendar icon]
- Liability Amount * (required): [text input]
- Reinstate: [calendar icon]
- Notes: [text area]
- Renewal:
- Satisfies Move-in Requirement:
- Property is Interested Party:
- Legal Liability:
- Pet Endorsement:
- Unlisted Additional Insured:

At the bottom, there is a search bar and 'Cancel' and 'Save' buttons.

Troubleshooting Workflow

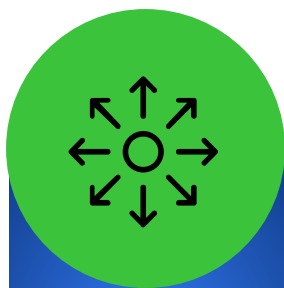


At times, you will encounter issues with the systems. We have created a Troubleshooting Workflow to help alleviate duplicate requests and user errors as well as prevent time delays in handling known issues.

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.

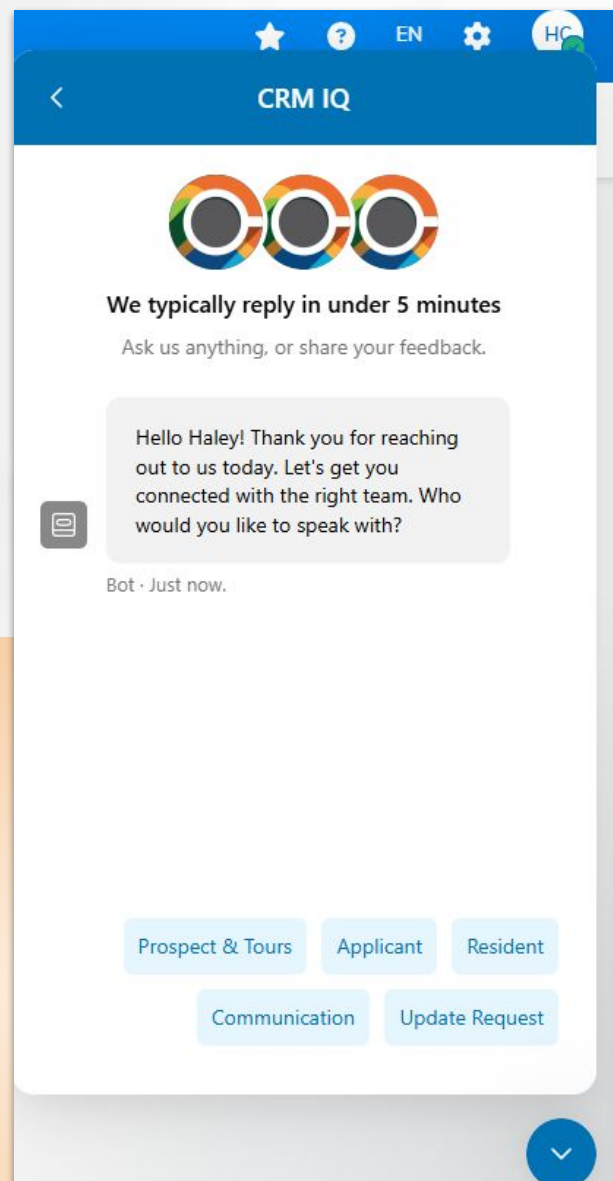
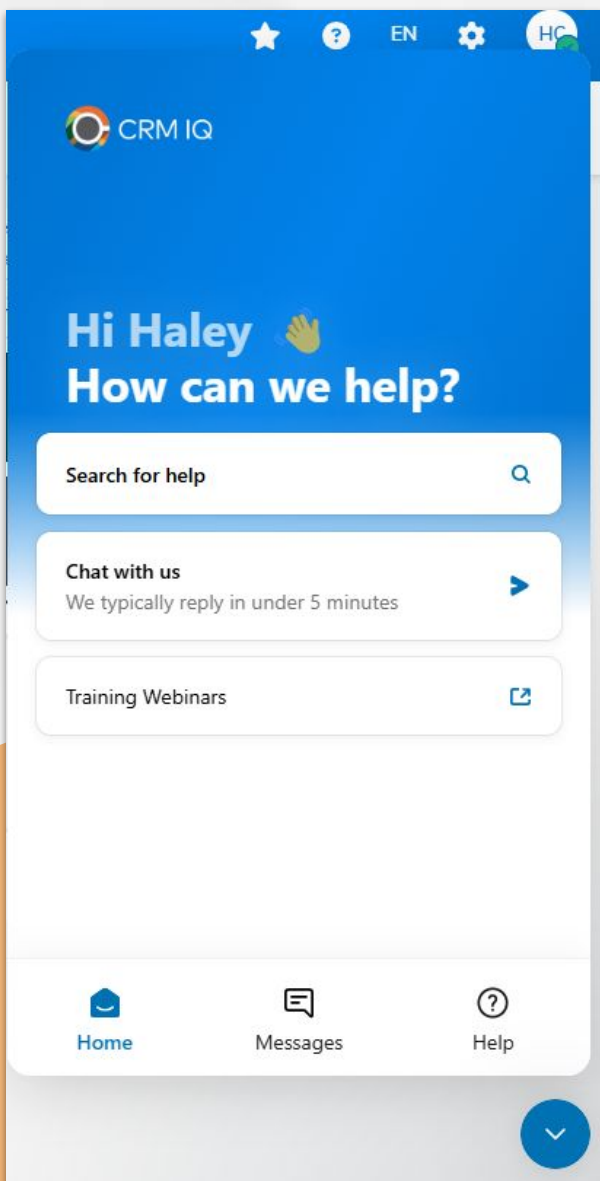
- **Screen shots:** (Must be of entire browser window set to Original Size if in Gmail)

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.

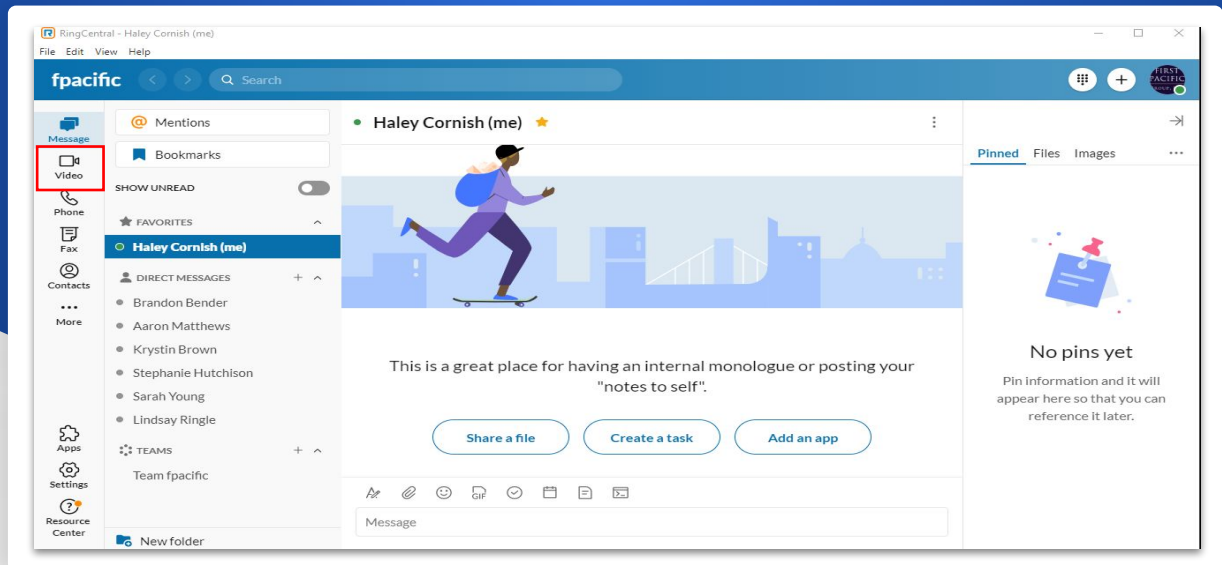
It's important to have screenshots for any issue / error message.



Ring Central

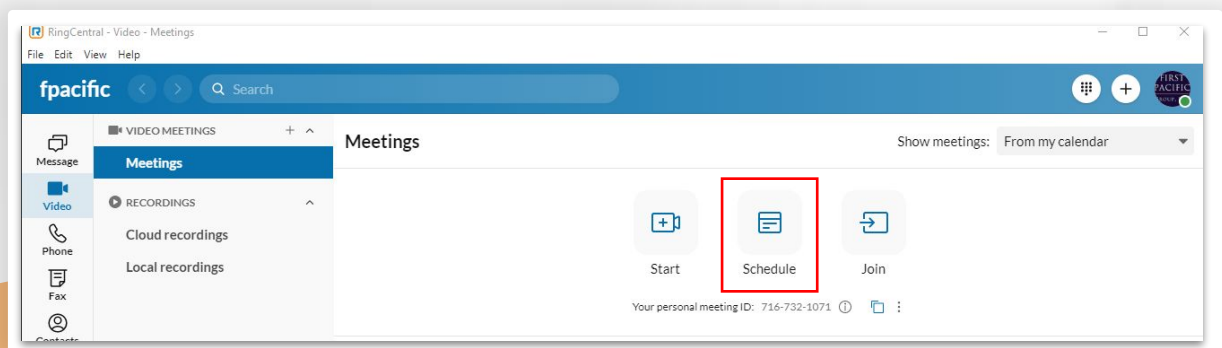


To use RingCentral first log in using your FP email and password. Once logged in your screen will look like this.



You then click Video on the left-hand corner. Once there you can Start, Schedule, or Join a call.

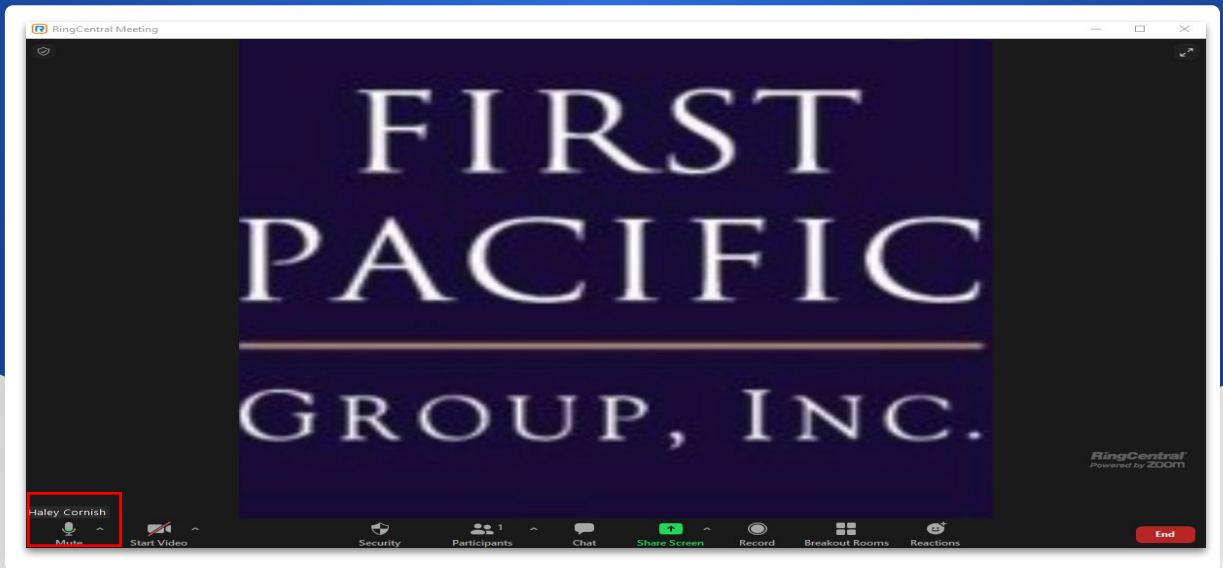
To Start a new meeting click Start and your meeting will instantly begin.



Ring Central



Once your meeting begins your screen will appear like this.



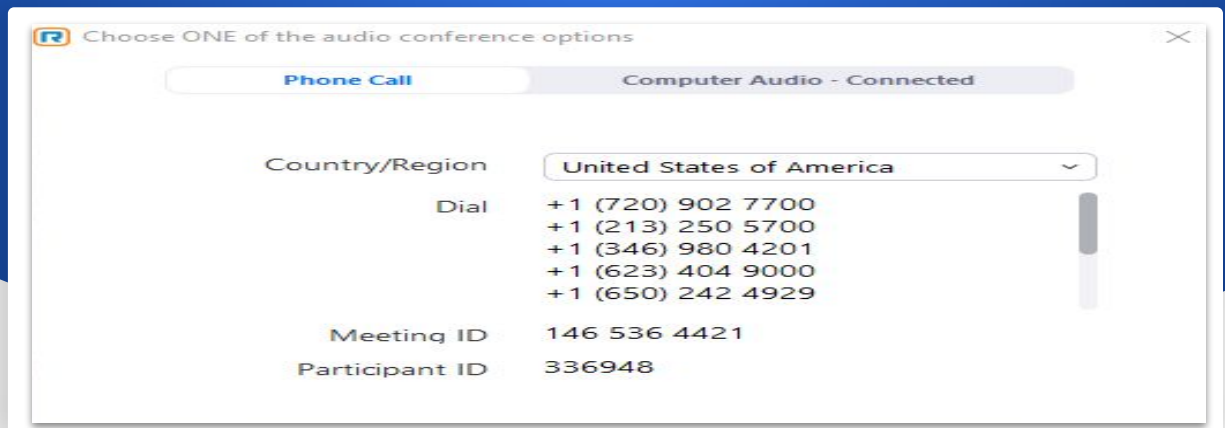
When click mute you can then select how you'd like to hear the audio.



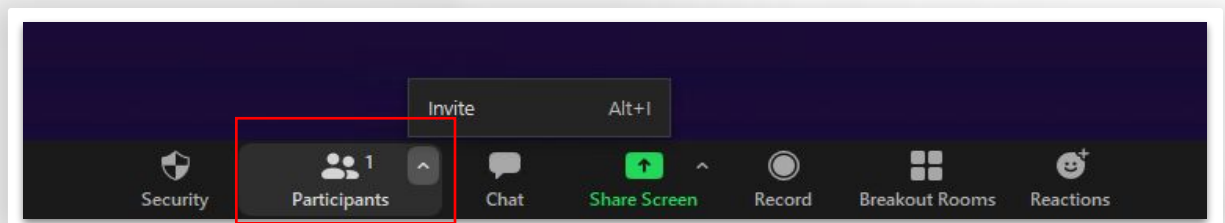
Ring Central



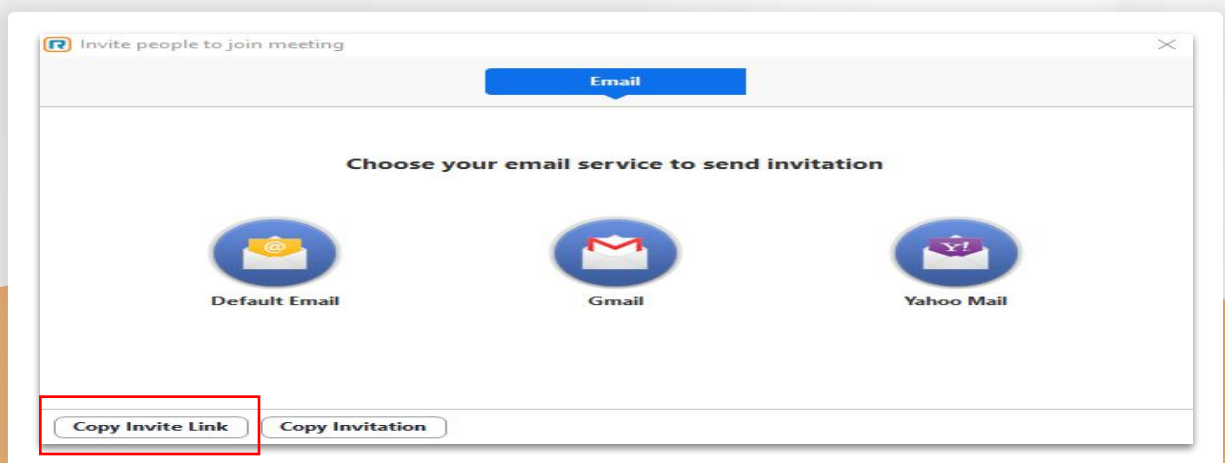
When you select switch to phone audio this screen will appear and give you the phone number to call into, the meeting ID, and Participant ID. Make sure to always enter your participant ID.



To quickly invite someone to a meeting click the arrow on participants and click invite.



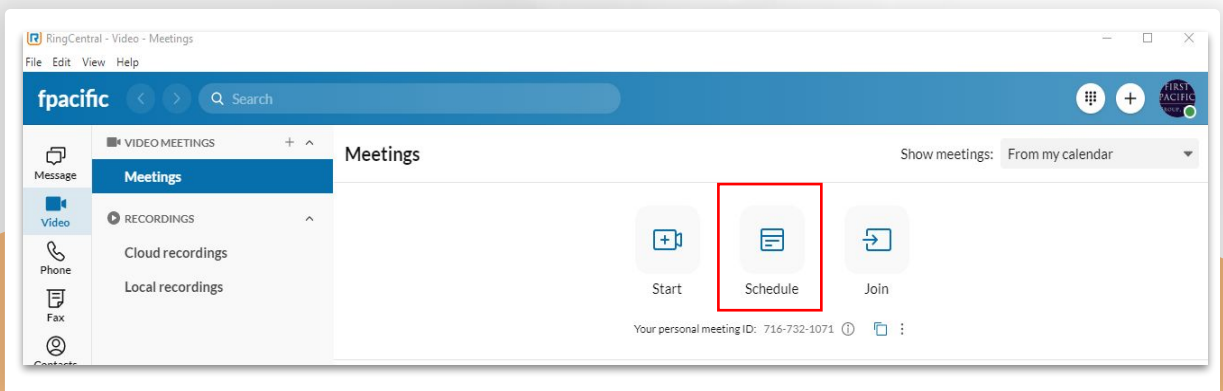
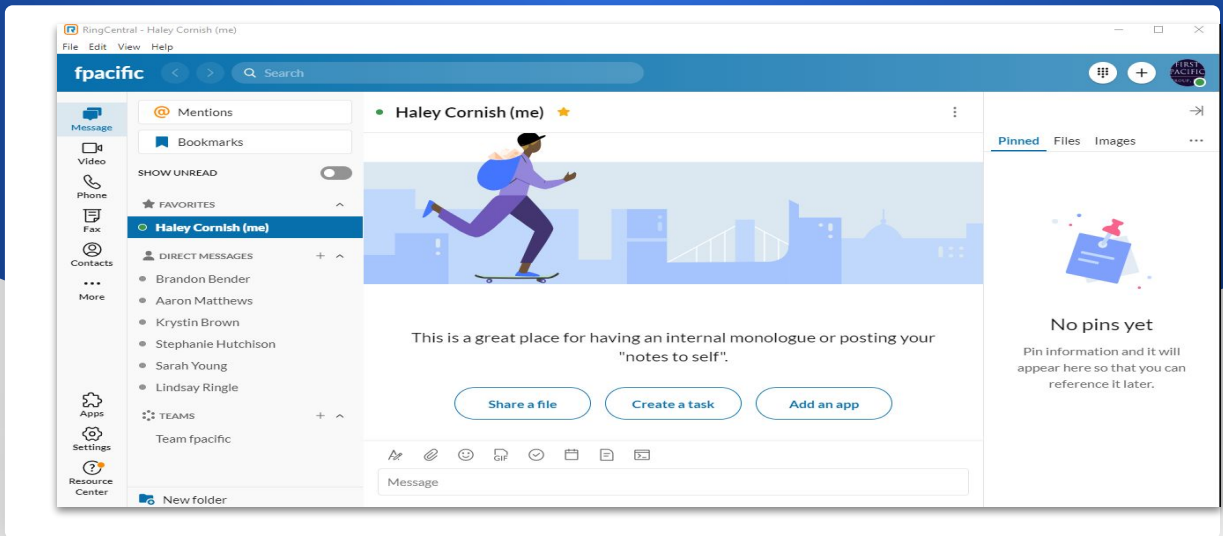
A new screen will populate then click Copy Invite Link and paste it in your email to send.



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#
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Leasing Training Guide

Event Out of office Task Reminder

Wednesday, June 8 – Wednesday, June 8 [Add time](#)
Does not repeat

[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.



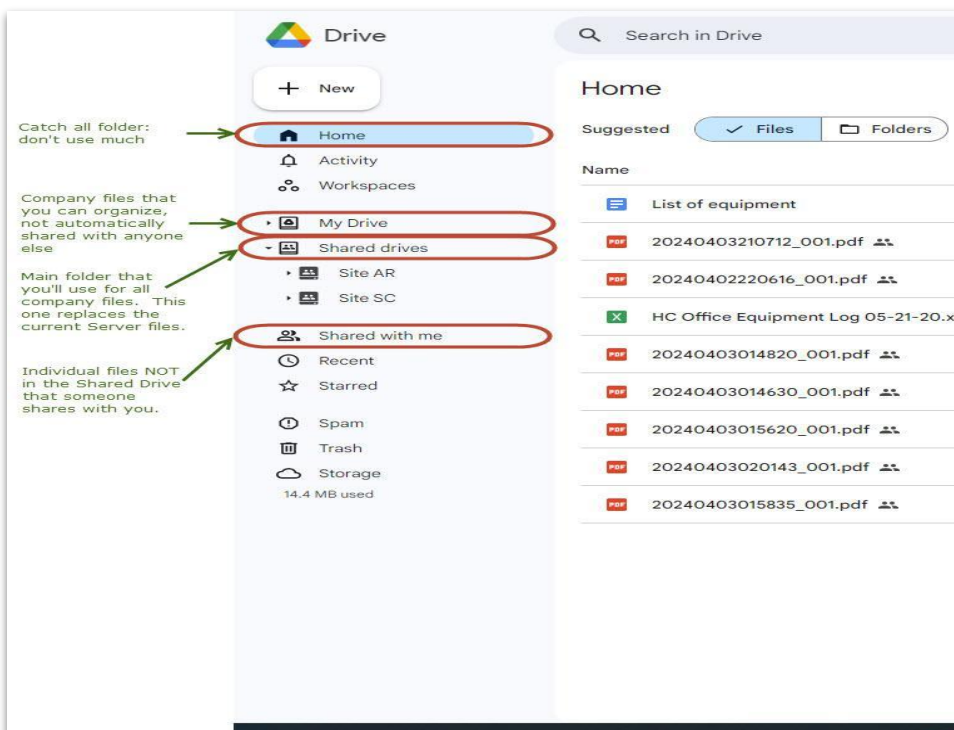
Google Drive Folders

-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.

Basic search

Click for Advanced Search

Click folder in main section to drill down. Or, click the down arrow in left column to drill down.

Name	Last mo...
Site SC	4 groups · 1 person
Home	
Activity	
Workspaces	
My Drive	
Shared drives	
Site AR	
Site SC	
Inventory She...	
Office Equipm...	
Training Mater...	
_Scanned Docu...	
Accounting	
Lease Documents	
Legal	
Maintenance	
Marketing	
Office Forms	
Photos	
Resident Docum...	
Special Projects	
Vendors	
Weekly Reports	



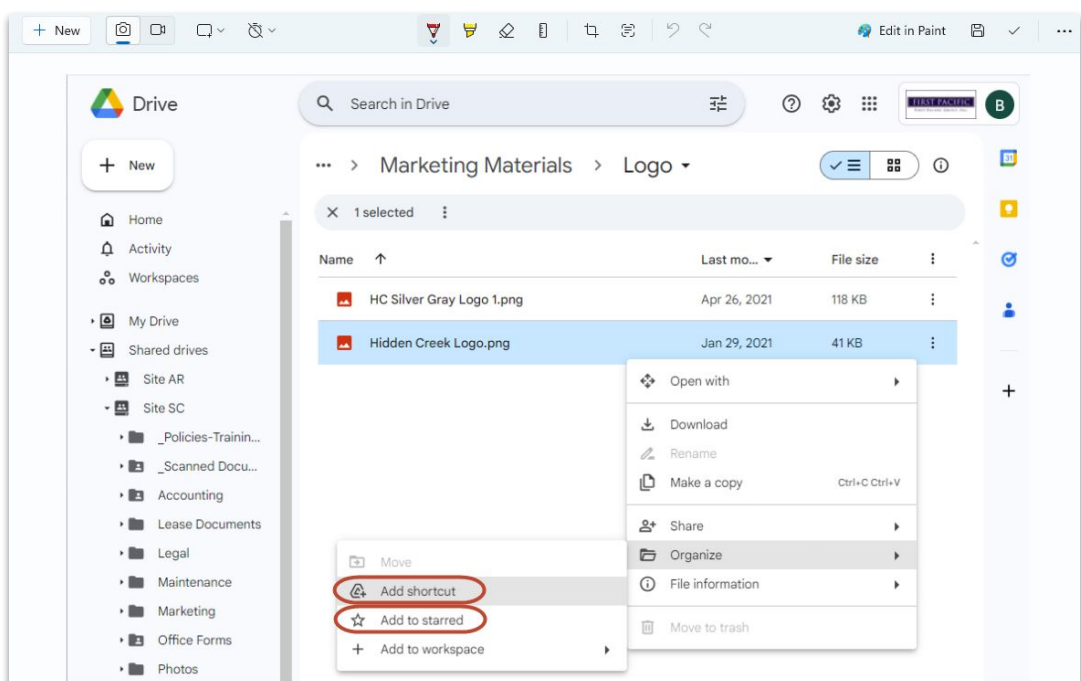
Organizing Shared Drive Files for easier access

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.

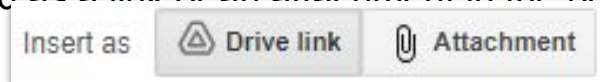
Share a Google Drive Document

- 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 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**