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

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Office Information

Property Specific Logins

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

Office Hours

Your Schedule

What to do if you're sick

Uniform

Eating, Smoking & Lunch Breaks

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

Parking Your Car

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

Time Sheets & Time Clock

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

Your Team

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

Office Information

Keep Track, Date Stamp

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

Cost of Replacement Items

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

Ideas ?

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

*Further policy information is available in the FG handbook. It is company policy to review this.
You are required to review the handbook and sign that you have reviewed it via eLearning.

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Daily Tasks

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

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

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

Keep in Mind at All Times

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

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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

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Email

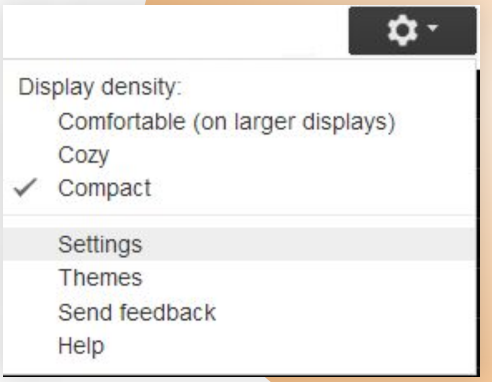
You have received your @fpacific.com email account. To log into it, you must go to www.gmail.com. Remember to change your password upon logging in.

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

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

Setting Up Your Signature

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



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

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

Email Etiquette

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

How to Reply to Prospects

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

Email

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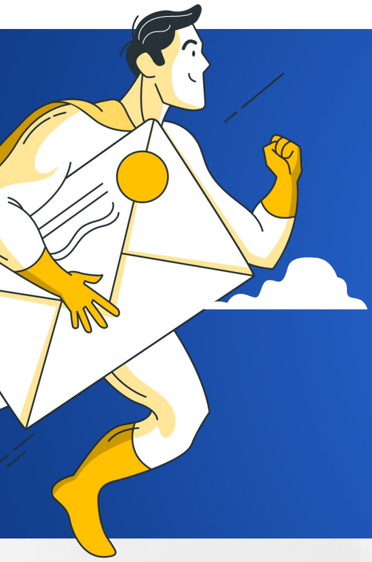


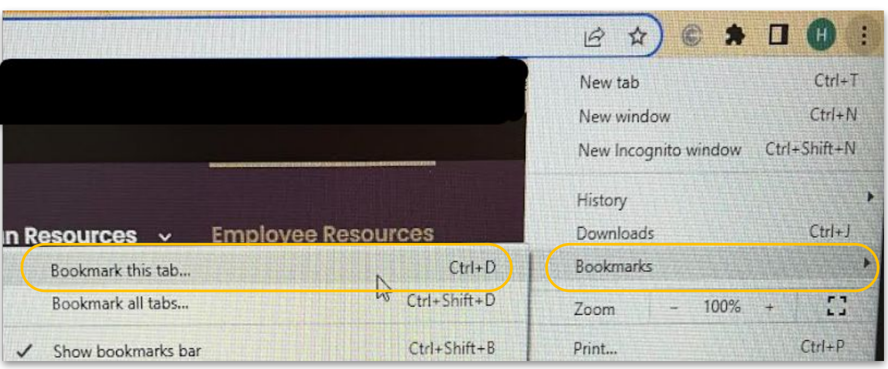
- Email responses for prospects should always be replied back the same day, as soon as possible to make sure we capture this hot lead.
- Begin the email with a "Hi", or a "Good Morning" and the person's name.
- All emails should have your signature.
- You should not email any resident, applicants, or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

Sending Screenshots

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

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

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



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

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

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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 sent 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 activiely 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.

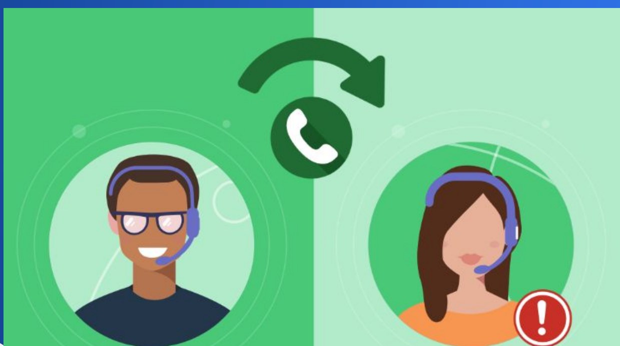
03 If an employee scores 75% or lower on any call after the initial training, it is the manager’s responsibility to provide additional follow up and support to correct performance

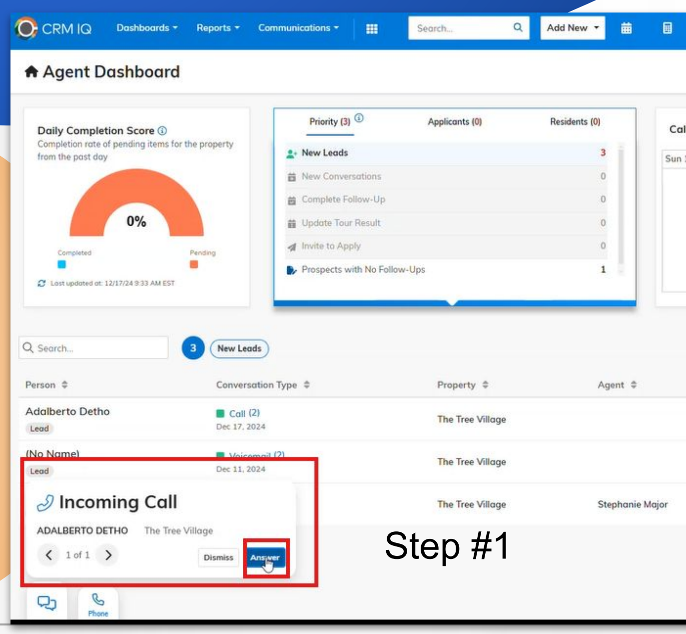
04 Managers are responsible to making sure each team member schedules or submits their call by the due date.

CRM IQ

Call Transfers in CRM IQ

Click here to watch!

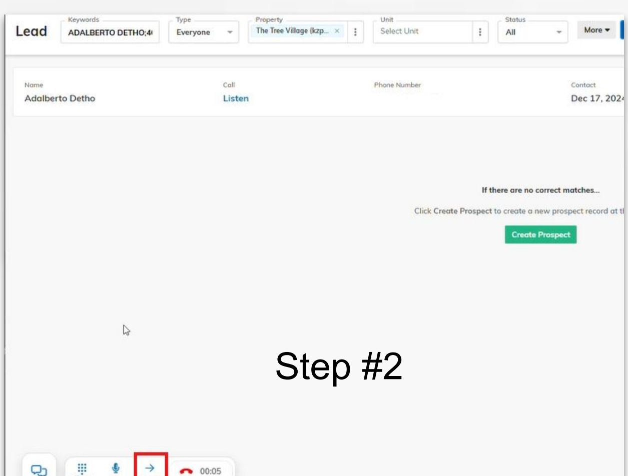


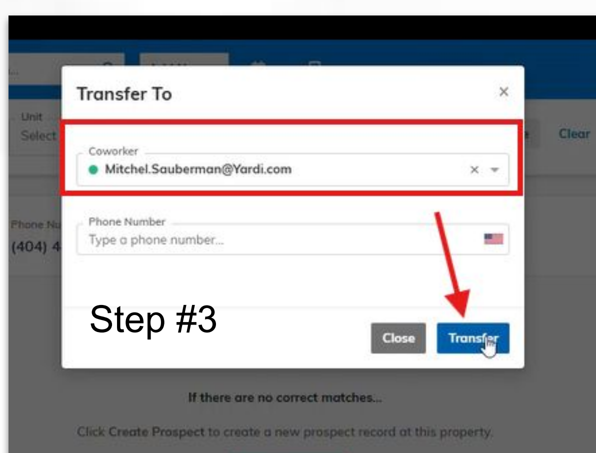


If a call needs to be transferred to a different agent / manager simply answer the call once answered click transfer → Select your agent → click Transfer.

This will send the call directly to the agent.

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





Leasing Training

Watch this

https://vimeo.com/367813777

- If your tour is coming in after a phone call and you have the appointment set, make sure you have their guest card ready. Know their name. You have already obtained information to find them a home, now you just need to get the specifics. If they show for their appointment, you are 80% there! They are interested.
- If the tour is a new piece of traffic, sit down and fill out a guest card for them. “Interview” the prospect to get enough information to help them find their perfect home. Smile and create positive energy.
- **Always get a photo ID** and note the number on your guest card. Do not make a copy of the ID. We only accept government issued ID’s. They must be current, i.e. not expired. Place the ID on your desk while you tour – don’t forget to return it!
- Lead the tour. Take charge.
- Make sure to provide all prospects with the same information. This includes utilities, lease terms, specials and the criteria. **Be aware of fair housing regulations at all times.**
- While touring, walk prospects to your amenities. Also show parking options, mailboxes and laundry facilities. Even if you don’t show them all of these items (if the amenities are closed), let them know what you have to offer them.
  Be creative and ensure we stand out from the 5 other tours they may take that day. Know your key selling points for the property and each apartment.
- Walk them through each room and help them visualize their furniture in the home. Refer to the home as theirs.
- Mention $$$ and value from the very beginning. Let them know how much it is to make this their home.
- **Create urgency!** Do not tell them you have 10 units available. Get as much information as possible. Listen to your prospects and make sure you know how to respond to all objections. What floor do they prefer? What exposure? By doing this you will narrow down their options and truly only have 1 or 2 units that suits their needs. Use words like “only”, “limited”, “last one”.
- Ask for the $$$! Don’t be afraid. All they can say is no. Ask them to fill out the application to reserve that apartment just for them.
- Assist the prospect in completing an application, use the tablet when possible.

Leasing Training

Follow Up

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

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

Holding Homes

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

Leasing Workflow Policies

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

First Pacific University

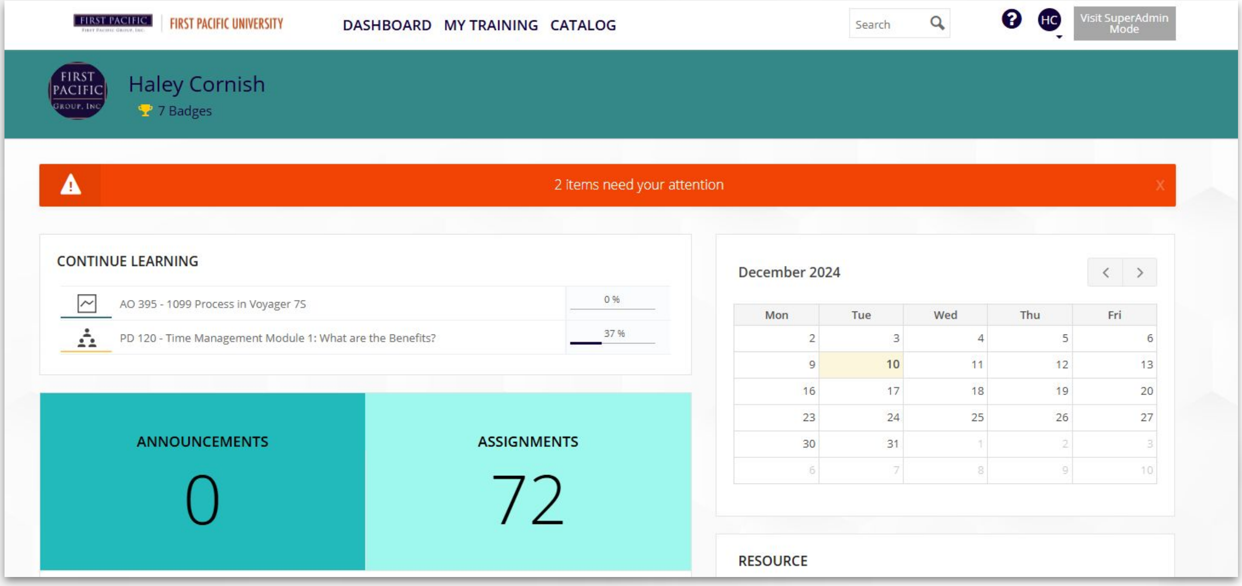
To access Yardi eLearning | First Pacific University

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

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.



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.

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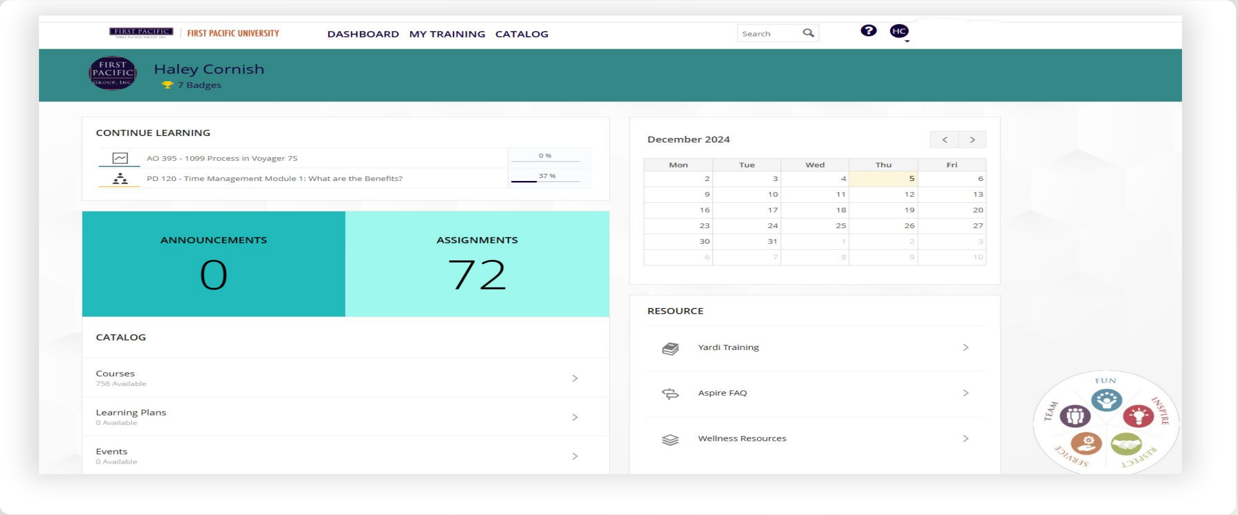
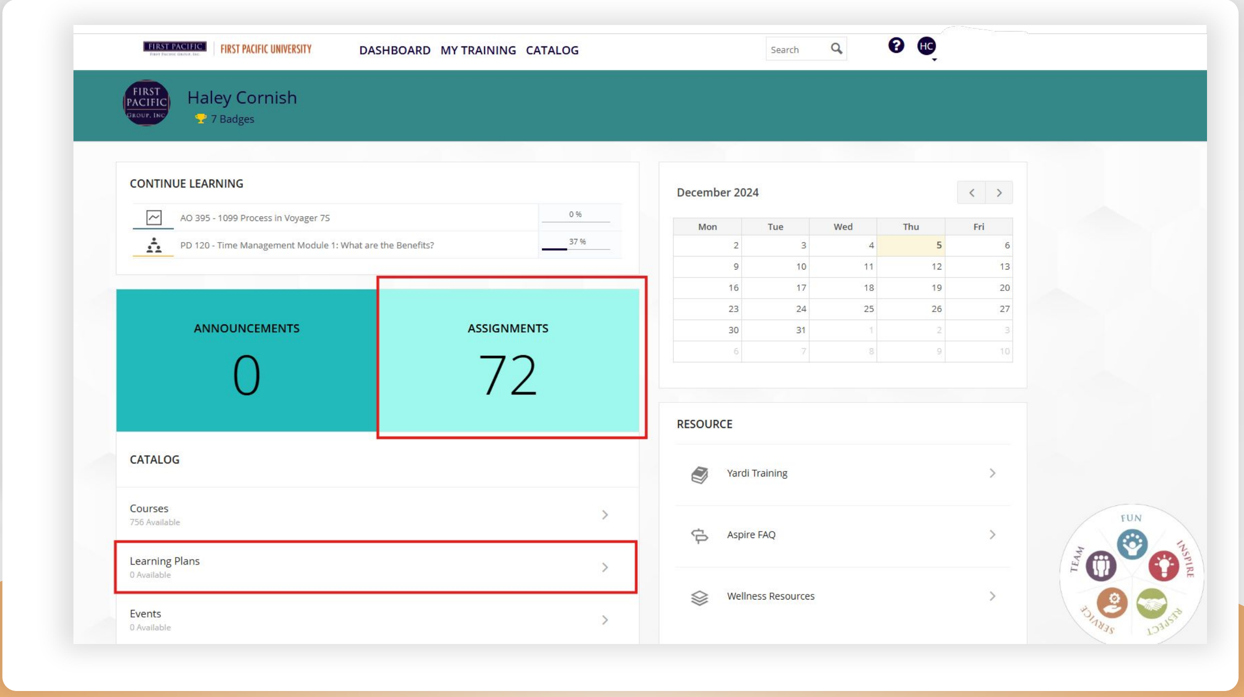
From the Dashboard, click Assignments.

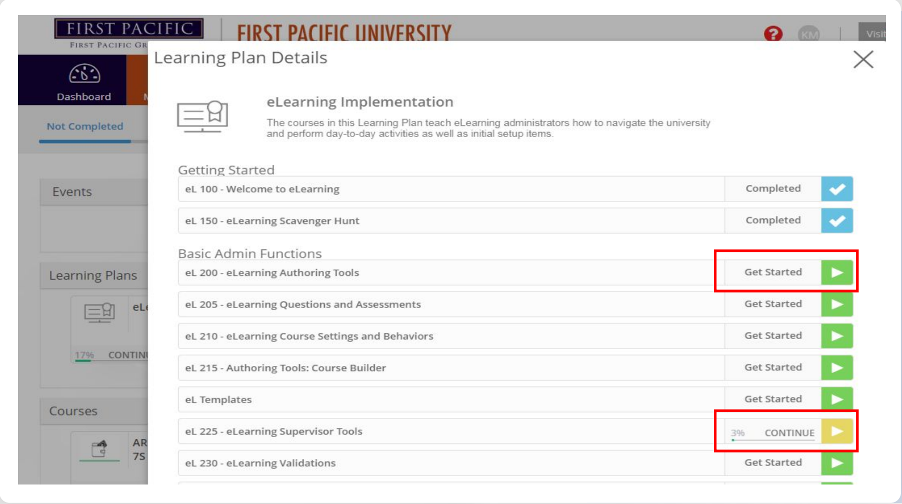


01 This will show any Learning Plans or Courses you have been assigned. Click on the Learning Plan or Course you wish to start or continue.



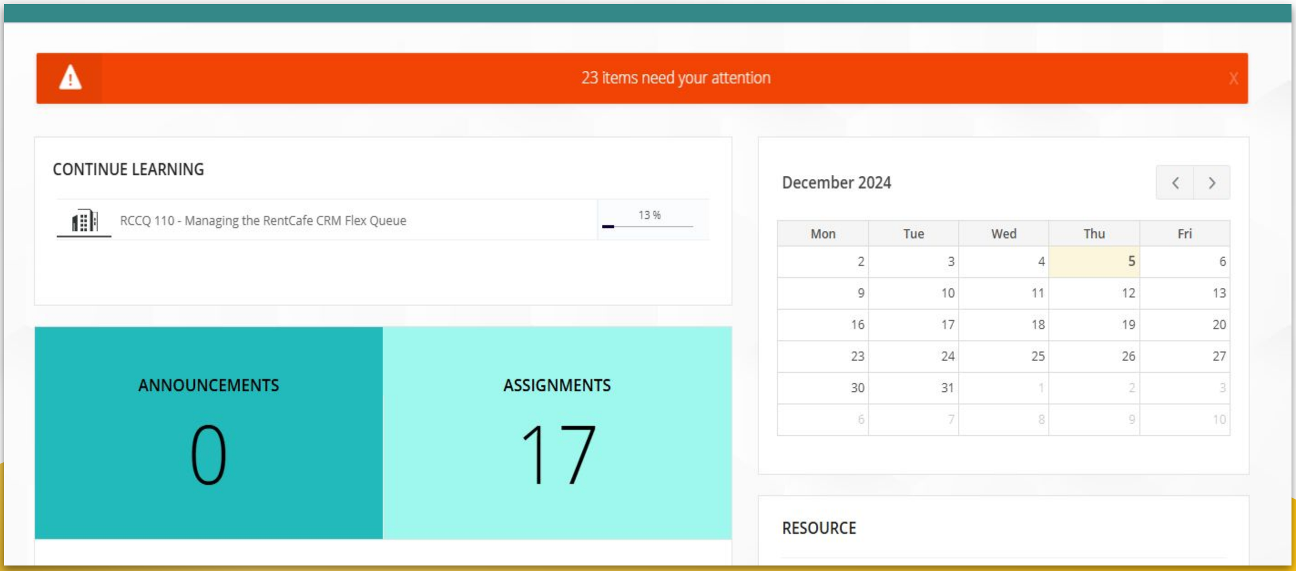
First Pacific University

From the Dashboard, click Assignments.



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

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



SHOPPING YOUR COMPS

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

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

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

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

Shopping Your Comps

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

First Pacific Onsite Evaluation

First Pacific Onsite Evaluation	
Greeting	
1. Did the Leasing Professional acknowledge you immediately, stand and greet you with a smile and shake your hand?	( ) Yes ( ) No (0)
If no, tell us what happened. Did they remain seated, were they busy with a resident, etc?	
2. Did the Leasing Professional introduce themselves?	( ) Yes ( ) No (0)
3. Was the Leasing Professional dressed professionally?	( ) Yes ( ) No (0)
If no, a comment is required.	
5. Did the Leasing Professional ask your name?	( ) Yes ( ) No (0)
If no, a comment is required.	
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?	
If no, a comment is required.	
Demonstration	
13. Did the Leasing Professional take control of the leasing visit?	( ) Yes ( ) No
If no, a comment is required.	
14. Did the Leasing Professional try to build rapport as you walked to the show unit?	[ ] N/A ( ) Yes ( ) No
If no, a comment is required. Please select N/A, only if there is no availability or tour.	
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.

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

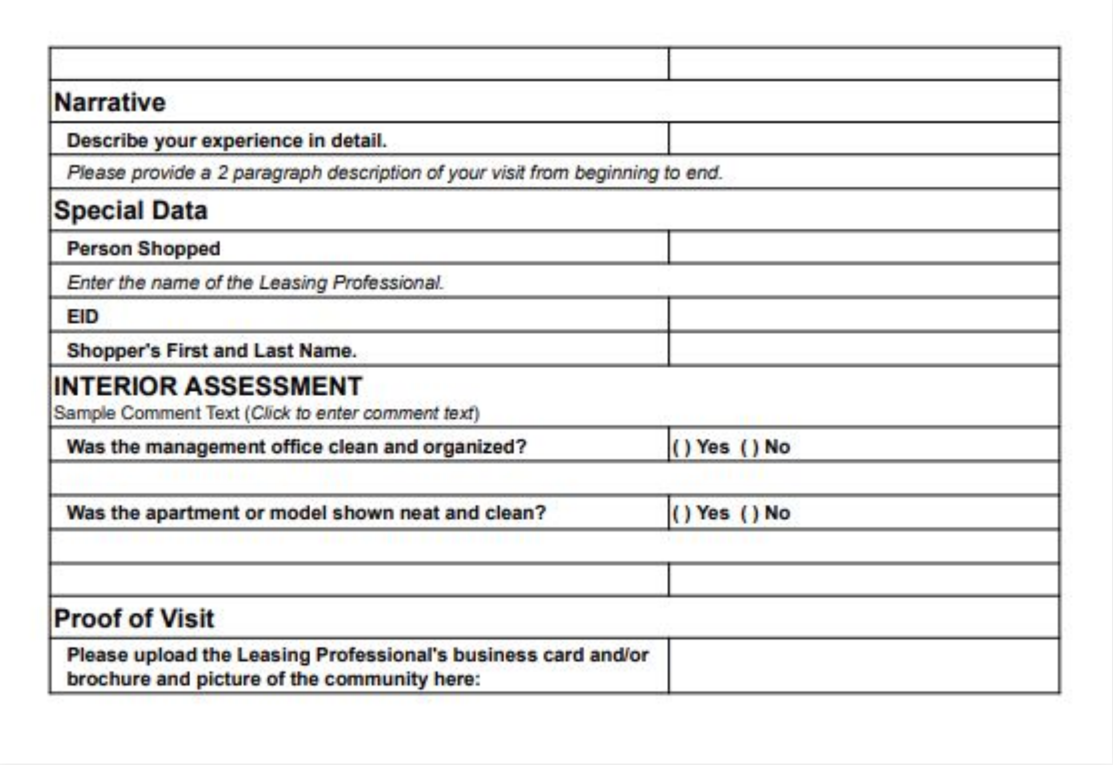
Shopping Your Comps

Fair Housing

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

Shopping Your Comps

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



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

Every Prospect Could be A shopper Always give 100%

Below is the scoring guide for secret shops :

Performance by Question

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

Closing	100.0%	100.0%
Did the Leasing Professional discuss pricing and related costs only after building value in the apartment and/or community?	2/2	100.0%
Did the Leasing Professional create a sense of urgency to lease the apartment?	3/3	100.0%
Did the Leasing Professional attempt to overcome and address your concerns or objections?	2/2	100.0%
Did the Leasing Professional ask closing questions during the tour? For example: "Can you see yourself cooking in this great kitchen?"	3/3	100.0%
Did the Leasing Professional encourage you to complete an application?	6/6	100.0%
Did the Leasing Professional attempt to close more than once?	4/4	100.0%
Did the Leasing Professional make you feel welcome and that they desired for you to live at the community?	3/3	100.0%
BASED ON THE LEASING PROFESSIONAL'S PRESENTATION - (NOT YOUR PERSONAL PREFERENCES OR THE CONDITION OF THE PROPERTY), would you have leased an apartment at this community, or if nothing was available, be interested in coming back to see an apartment at a later date?	6/6	100.0%

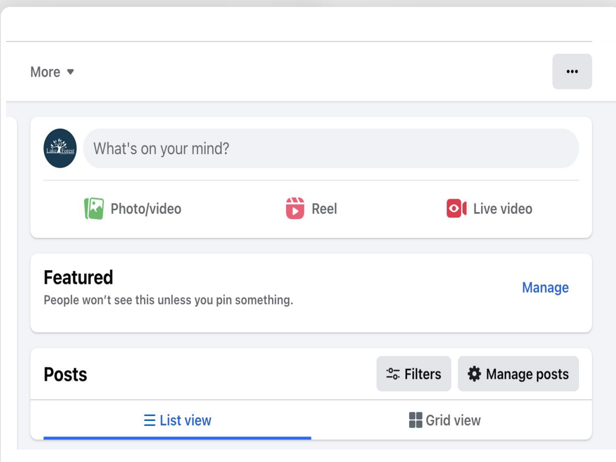
Follow Up	100.0%	100.0%
Did you receive a follow-up call or email within two business days?	3/3	100.0%
Did you receive a second follow up (thank you card, email or phone call) within three to five business days?	3/3	100.0%
Leasing Professional Perception	100.0%	100.0%
How would you rate the enthusiasm of the Leasing Professional?	3/3	100.0%
How would you rate the product knowledge of the Leasing Professional	3/3	100.0%
How would you rate the Professionalism of the Leasing Professional?	3/3	100.0%
Was the Leasing Professional genuine, warm and friendly?	3/3	100.0%
How would you rate the Leasing Professional's sales ability?	3/3	100.0%

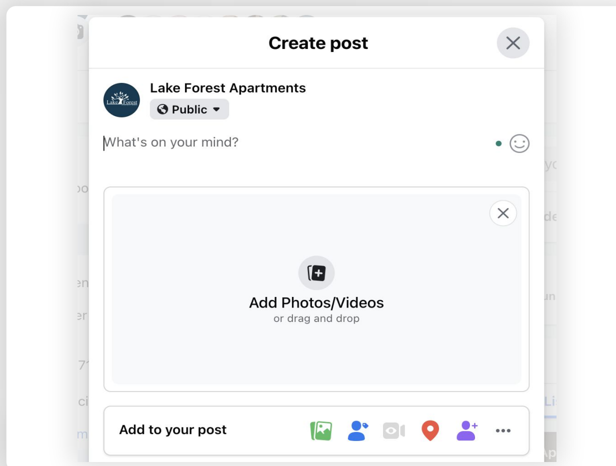
Posting On Facebook

Watch this

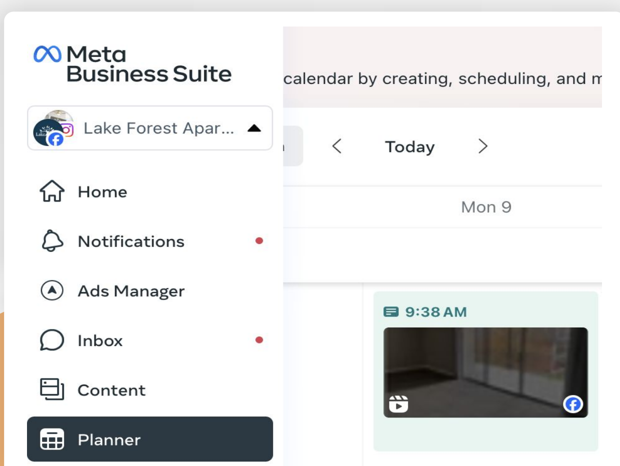
https://vimeo.com/578048373/6928802057

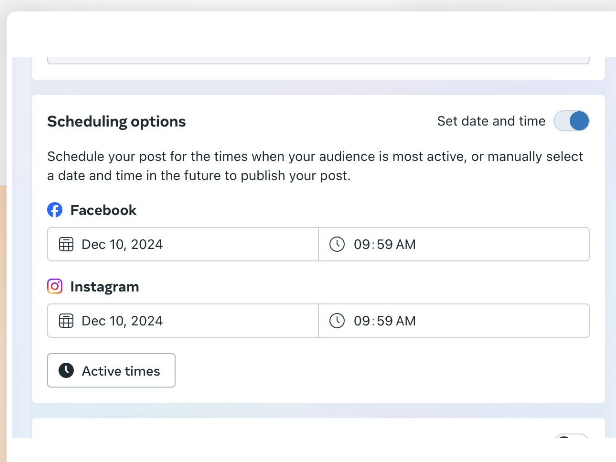
1. Sign into Facebook and go to your homepage.
2. Choose one of the post options or click "What's on your mind?..." to begin your post.
3. Create a post with text, pictures, and/or video. You can drag and drop pictures from your desktop for convenience.



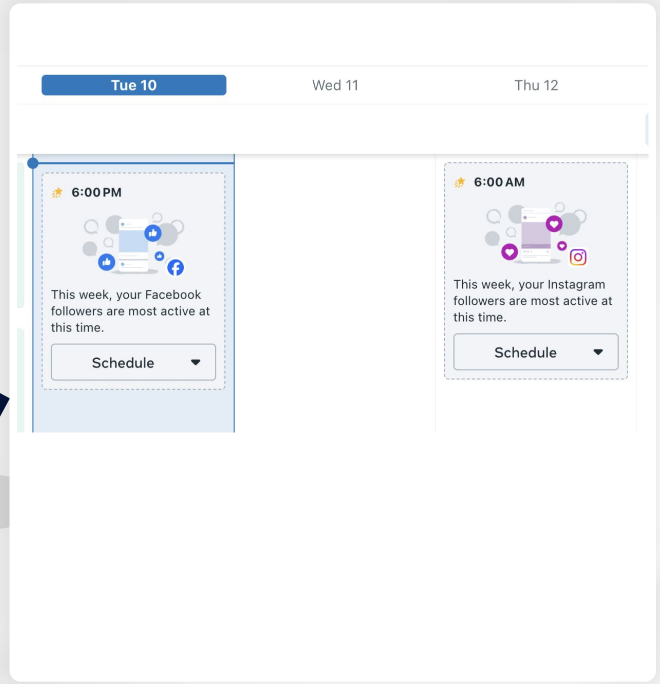


4. To schedule a post, Go to Meta Business Suite and select 'Planner'.
5. Option to schedule, backdate, or save a draft of your post. click "Create Post" in the upper left corner.
5. After creating your post, scroll down and click on the scheduling options. Select the date and time you want it to be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

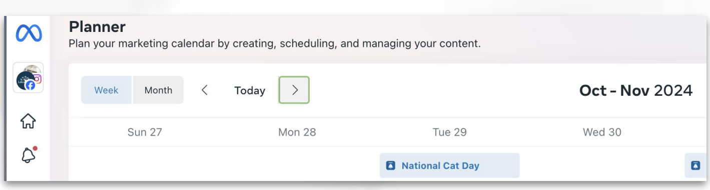


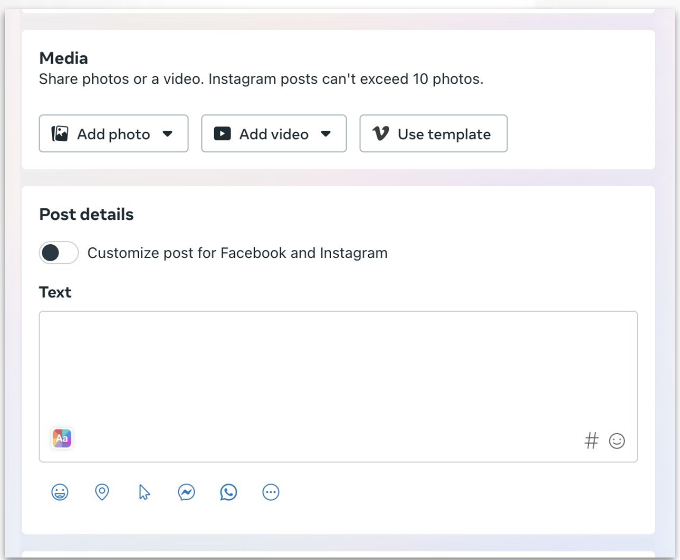


Posting On Facebook



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

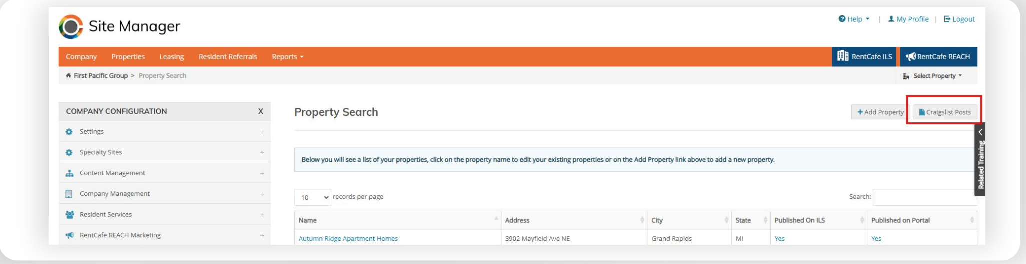


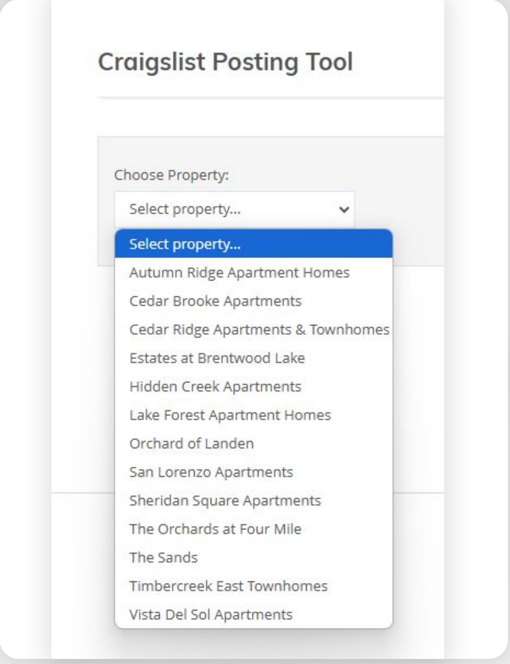


Rent Café Site Manager

Posting on Craigslist Classifieds

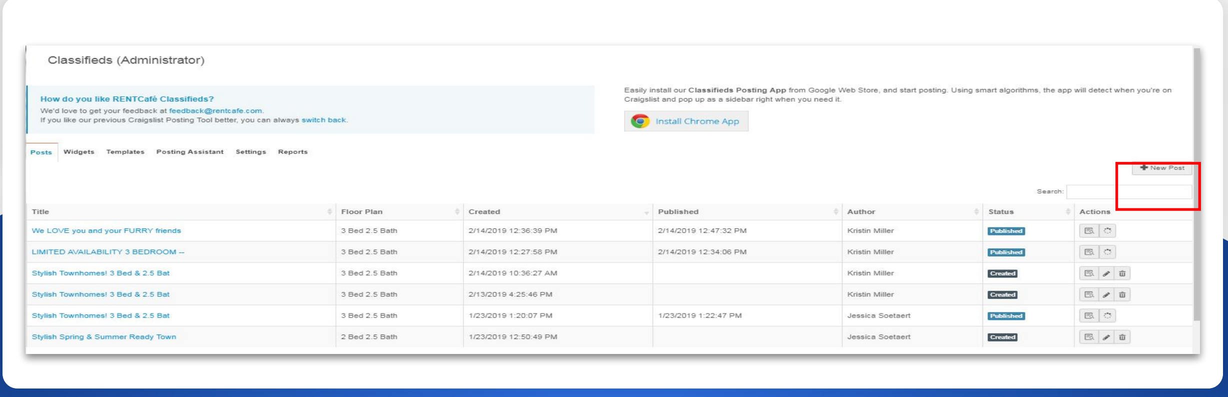
Open Site Manager and click Craigslist Posts





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

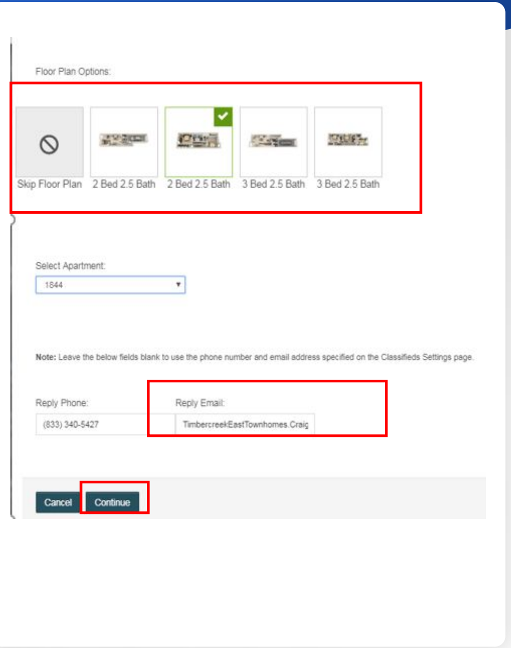
The Classifieds Posting screen will come up. Click **+New Post**.



Rent Café Site Manager

Posting on Craigslist Classifieds

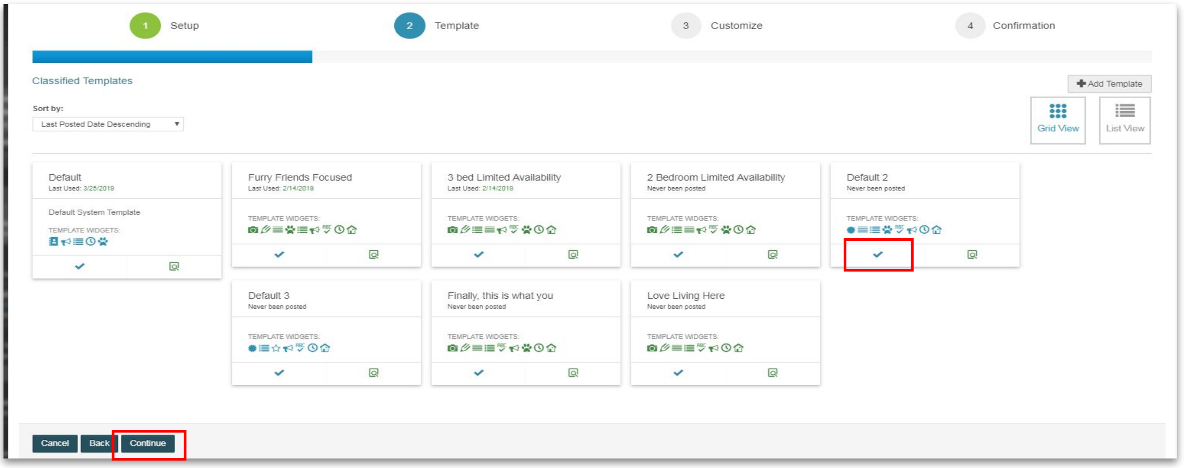
On the Setup screen, you will click on the Floor Plan you are trying to advertise. Once you select a specific floor plan. If you are not wanting to advertise a specific floor plan, you will click the Skip Floor Plan icon.



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

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

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.

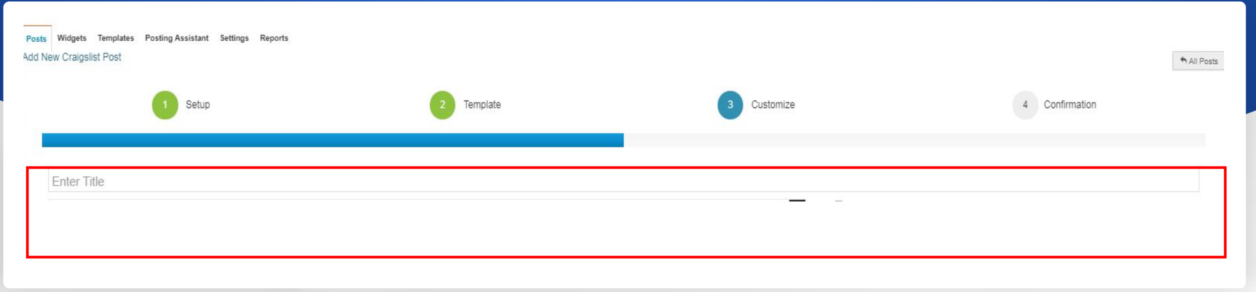


Rent Café Site Manager

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.



Leave Click to add photos **blank**

Rent Café Site Manager

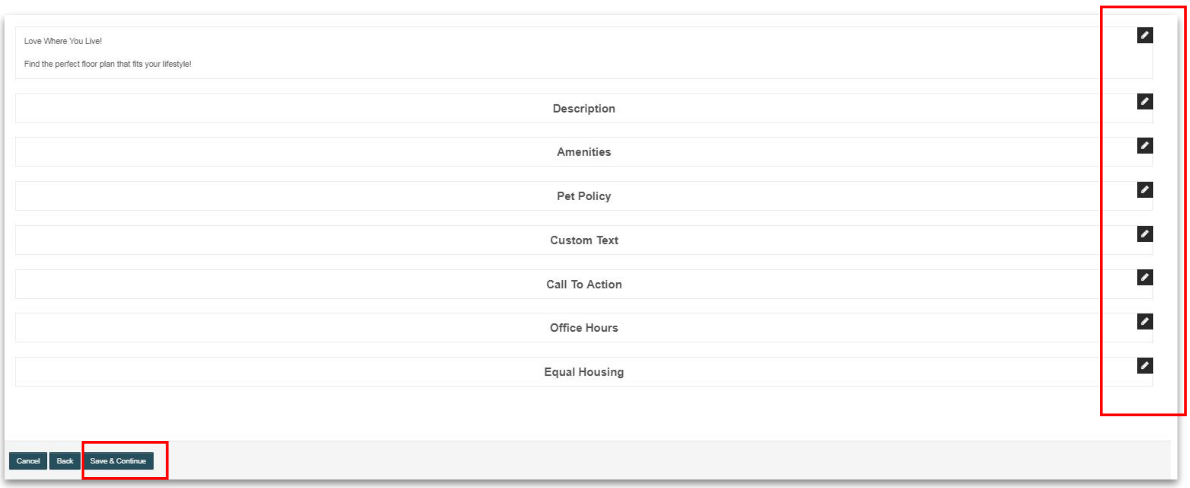
Posting on Craigslist Classifieds

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

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

Click Select **This Widget.**

Complete the Widgets for the remaining sections and then click **Save & Continue.**



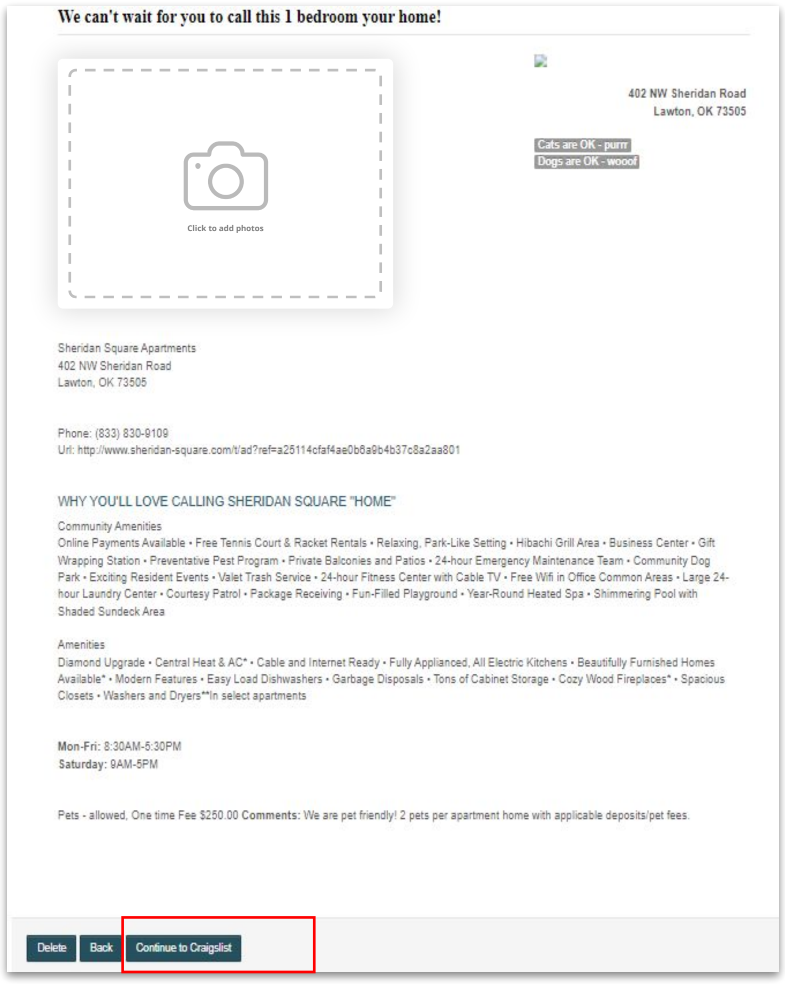
Rent Café Site Manager

Posting on Craigslist Classifieds

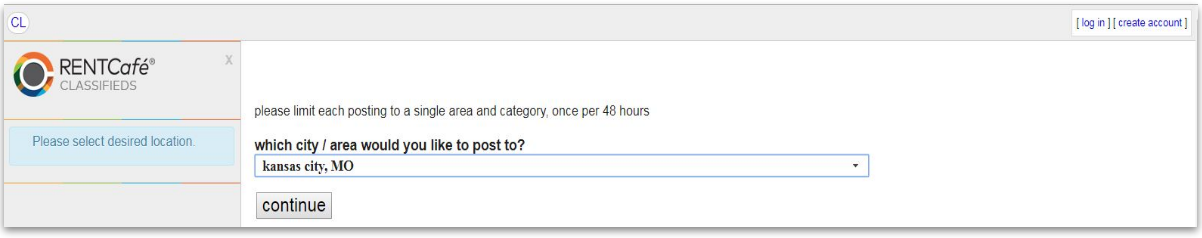
The next screen will show a **Preview** of the posting. Copy the full body of the AD, then click **Continue to Craigslist.**

***NOTE**

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



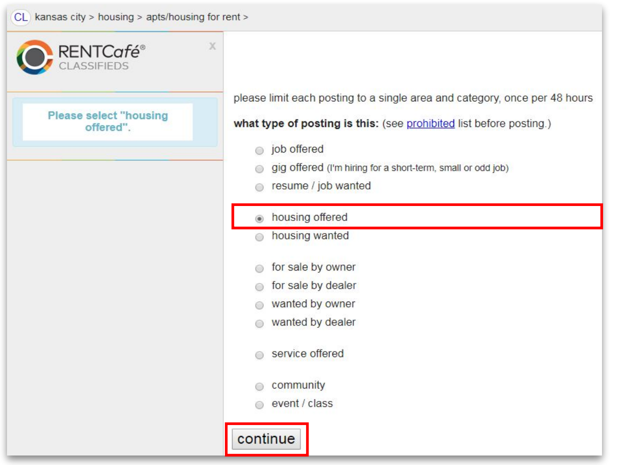
You **WILL NOT** log in to any accounts throughout this process. Click on the **City/Area** you are wanting to post to. Click **Continue**.



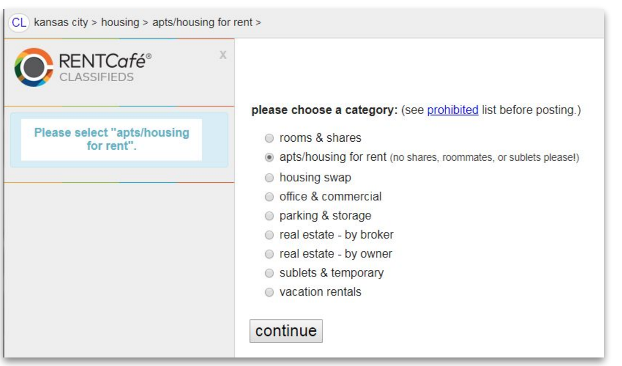
Rent Café Site Manager

Posting on Craigslist Classifieds

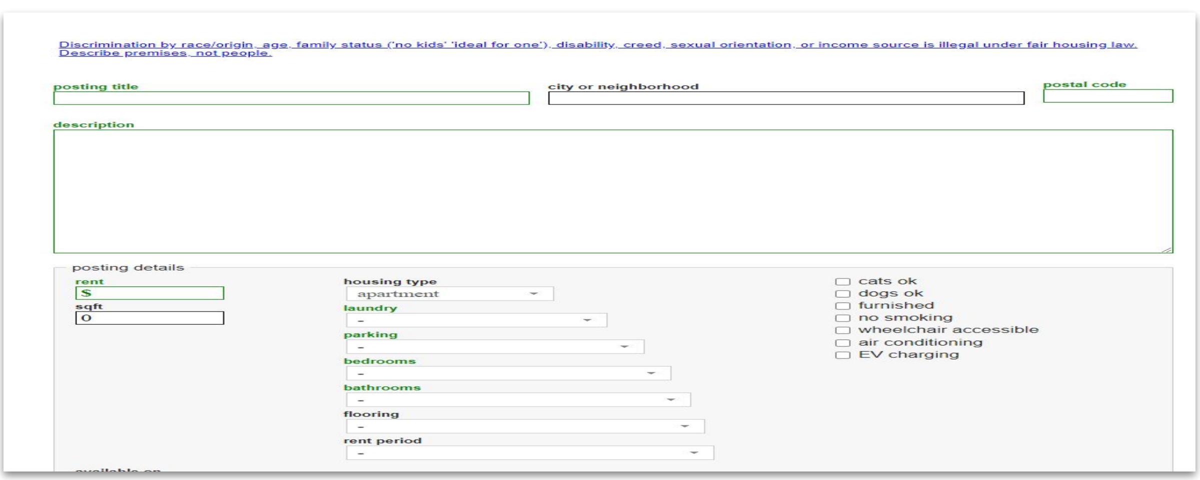
Click the **Housing Offered** button and then click **Continue.**



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

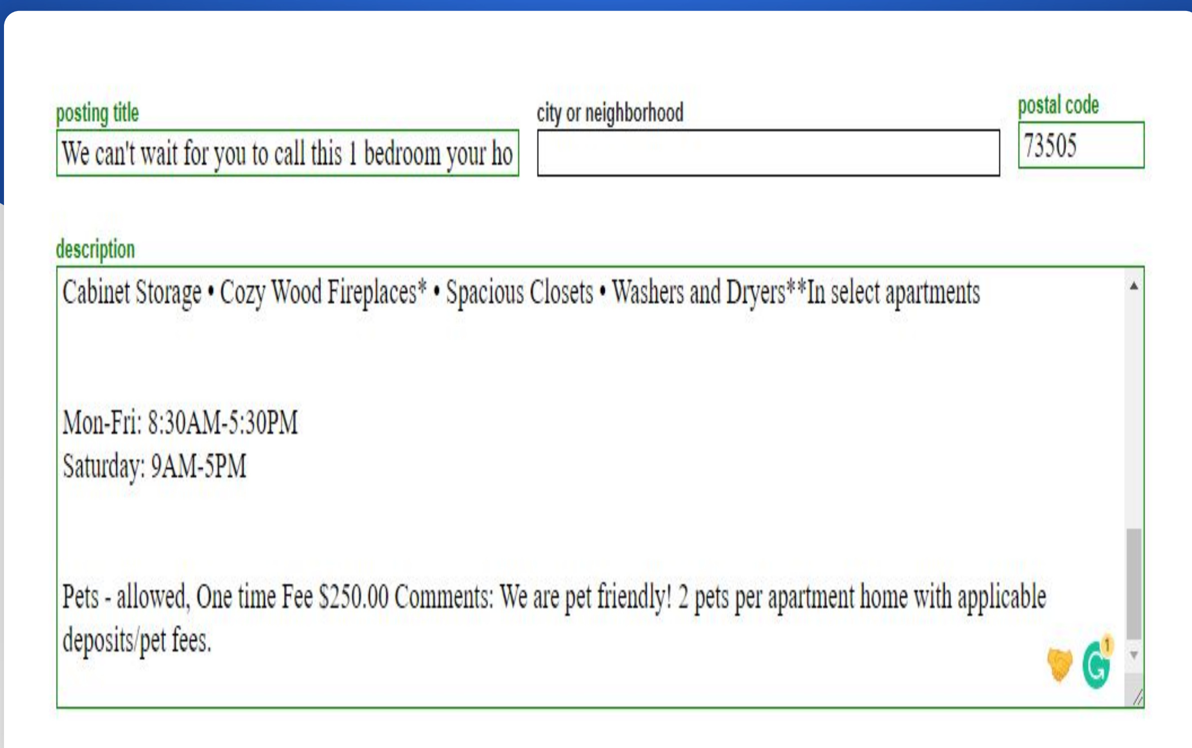
Copy the entire body of your AD

FIRST PACIFIC
FIRST PACIFIC GROUP, INC.

Rent Café Site Manager

Posting on Craigslist Classifieds

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


posting title

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

city or neighborhood

postal code

73505

description

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

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

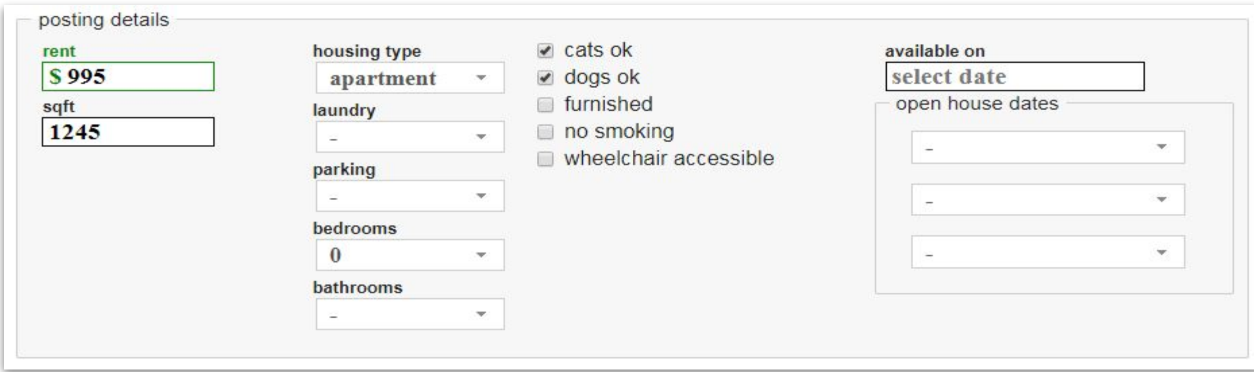
Pets - allowed, One time Fee $250.00 Comments: We are pet friendly! 2 pets per apartment home with applicable deposits/pet fees.

FIRST PACIFIC GROUP, INC.

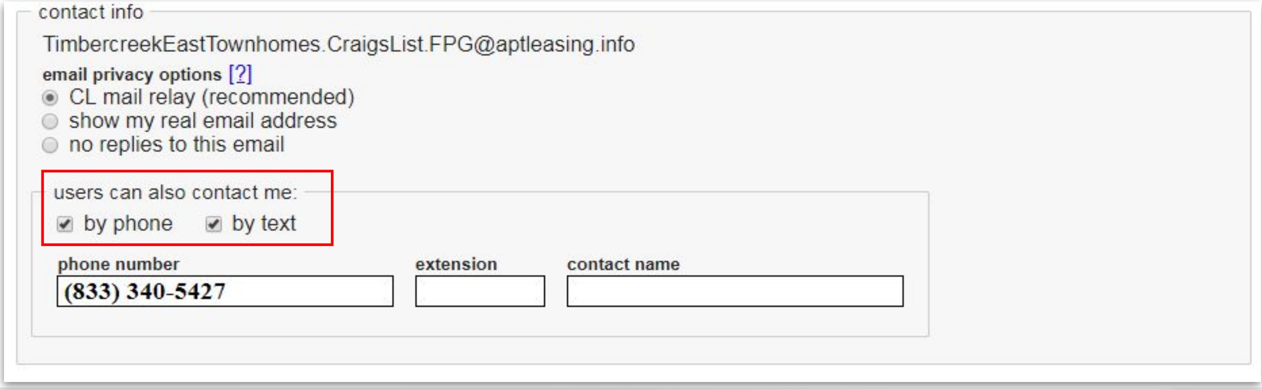
Rent Café Site Manager

Posting on Craigslist Classifieds

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



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



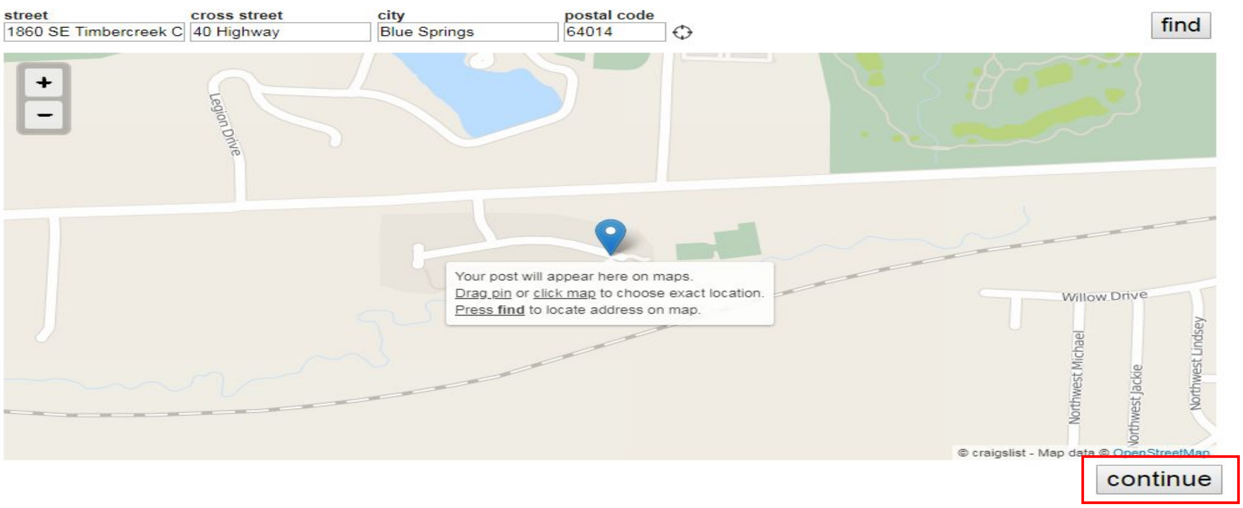
In the **Location Info** section, type in the **Street Address**, **Cross Street** and **City** of your property. In the **Copyright Assignment** section, check the box and enter **Your Name** and **Country of Residence**. Click **Continue**.

Rent Café Site Manager

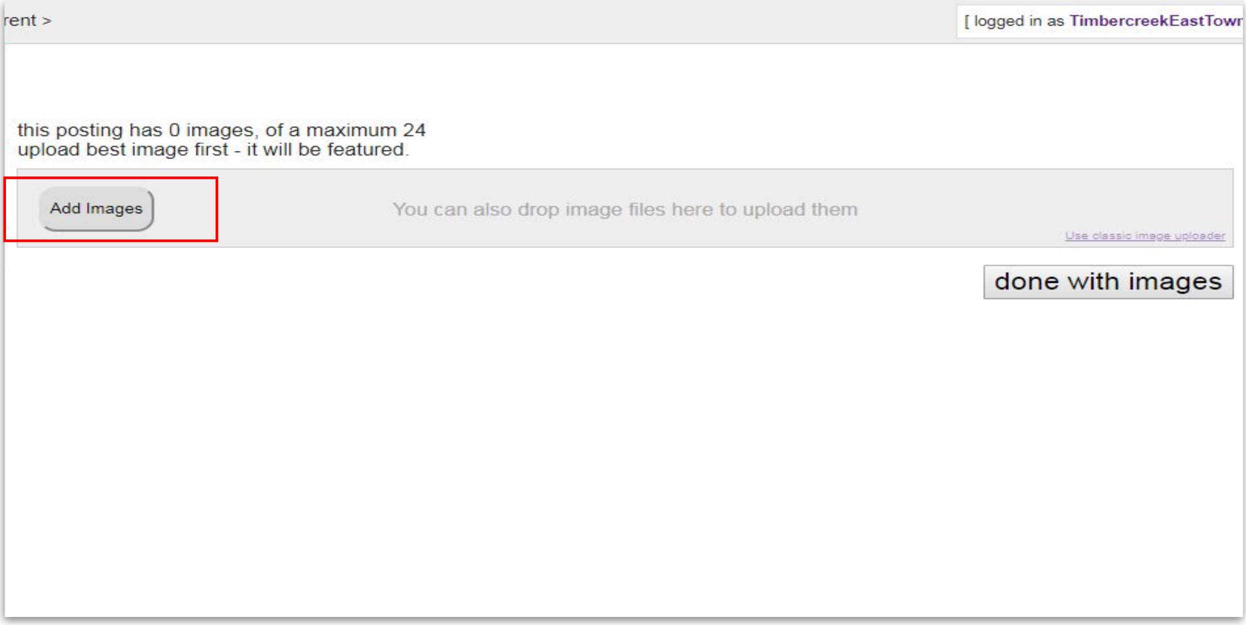
Posting on Craigslist Classifieds

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**.



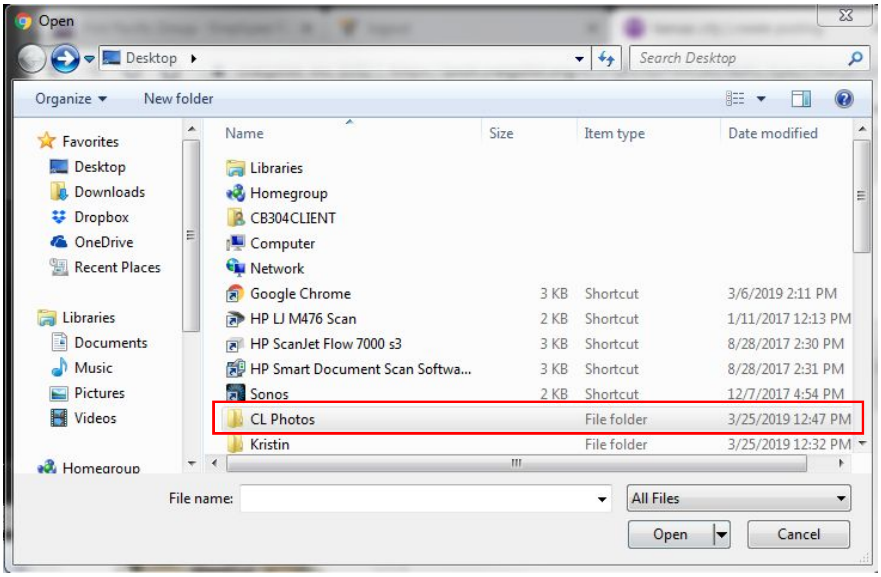
The next step is to download the Images from a designated area in your folder. Click on the add images.

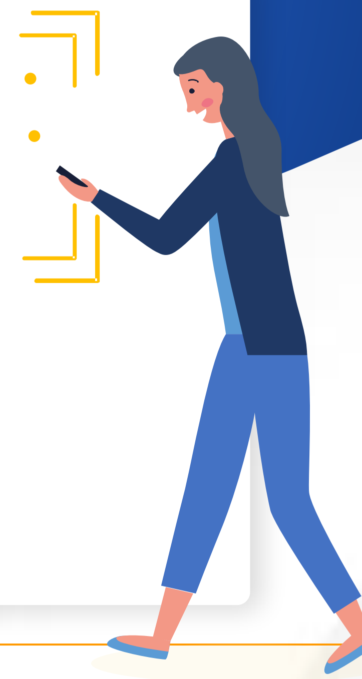


Rent Café Site Manager

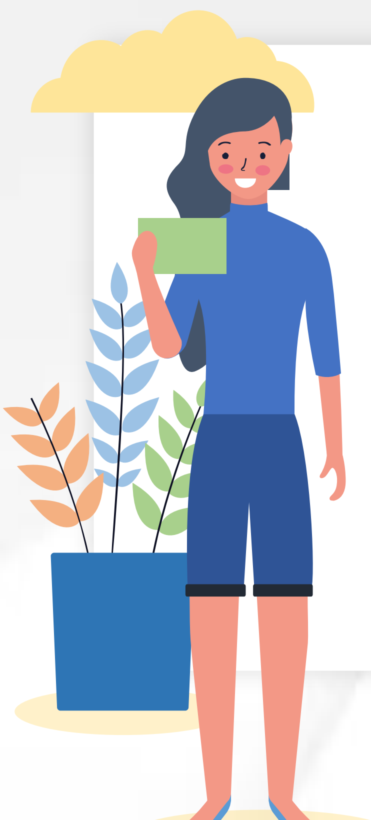
Posting on Craigslist Classifieds

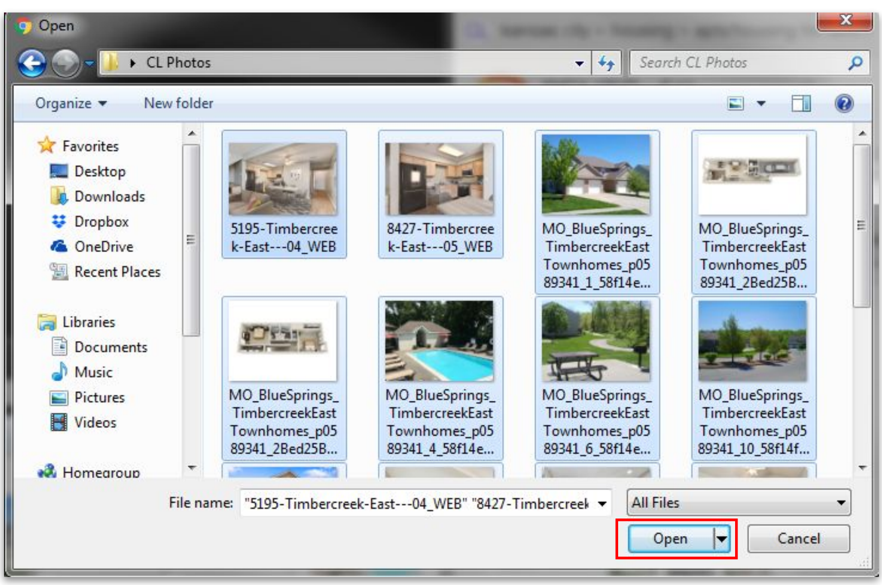
A window will pop-up to select the photos to add. Locate your newly created CL **Photos folder.**





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**.

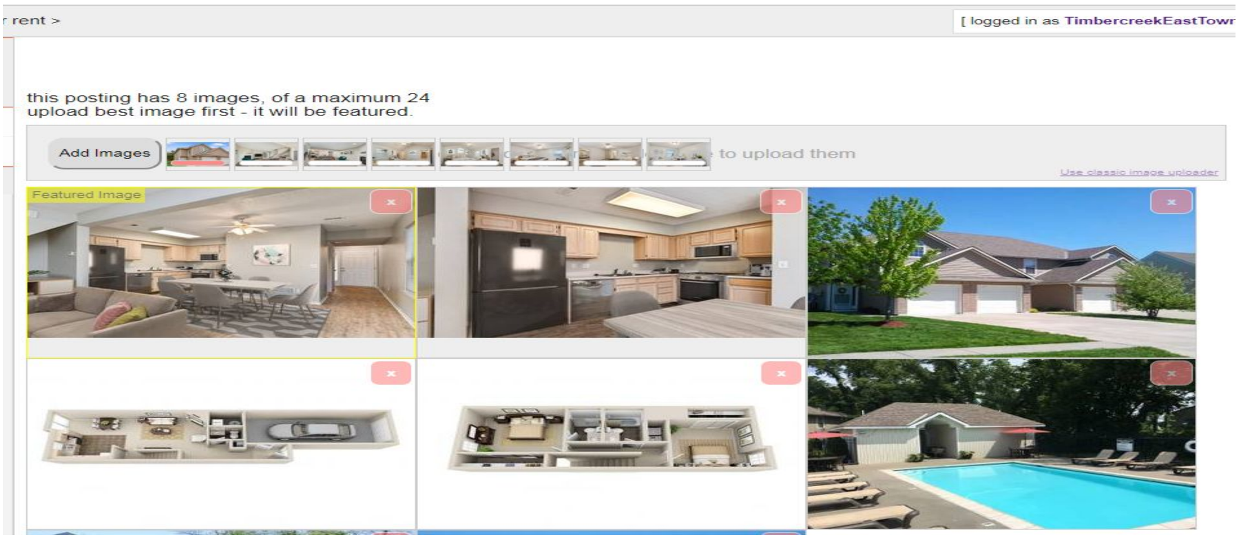




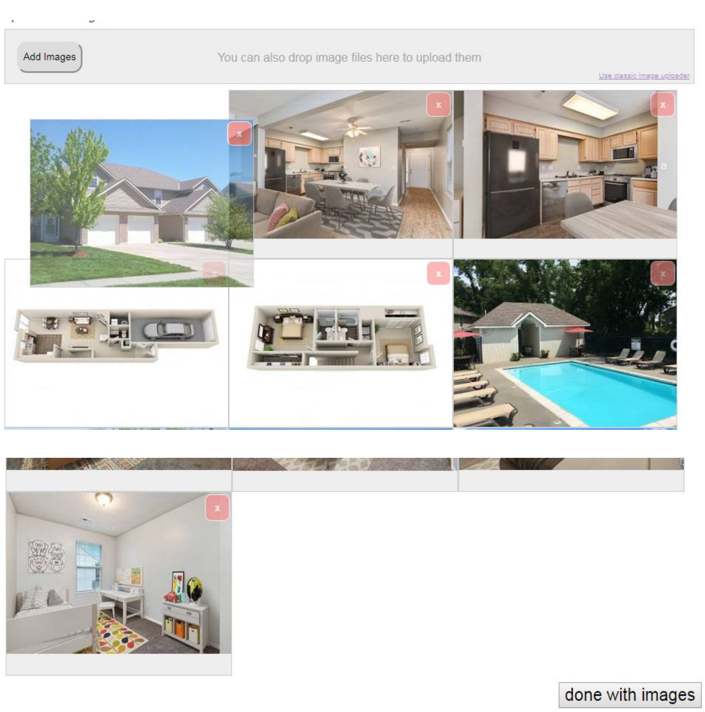
Rent Café Site Manager

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.

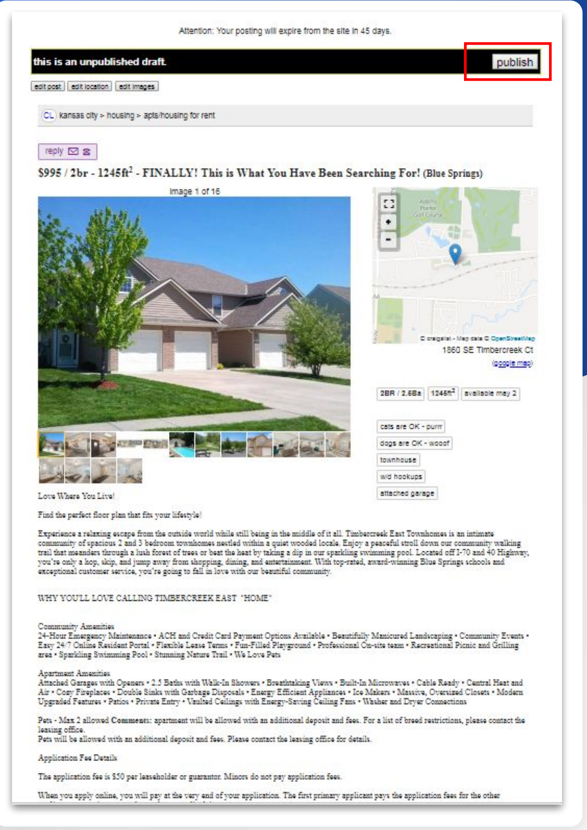


Once you have positioned the photos in the order you want them, click **Done with Images.**

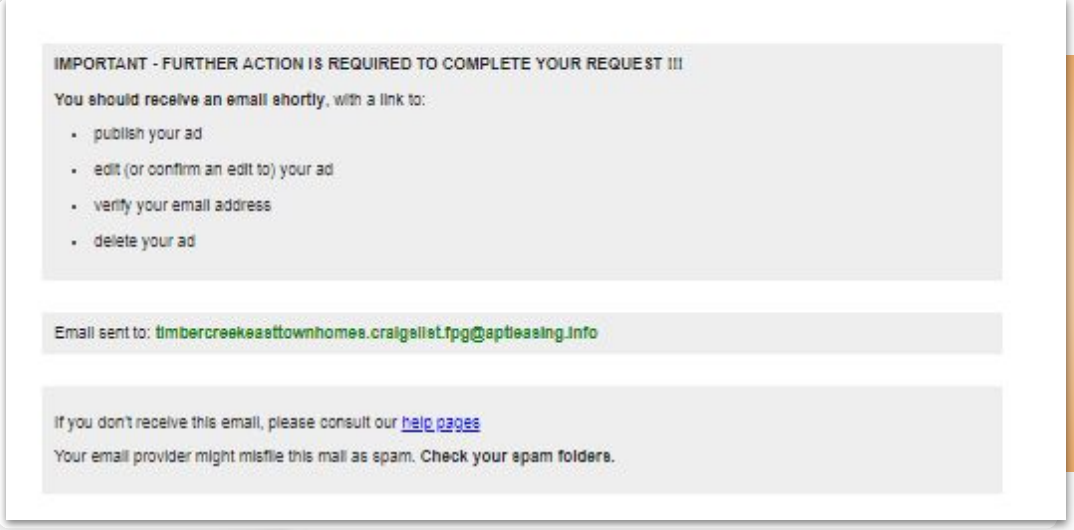
Rent Café Site Manager

Posting on Craigslist Classifieds

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

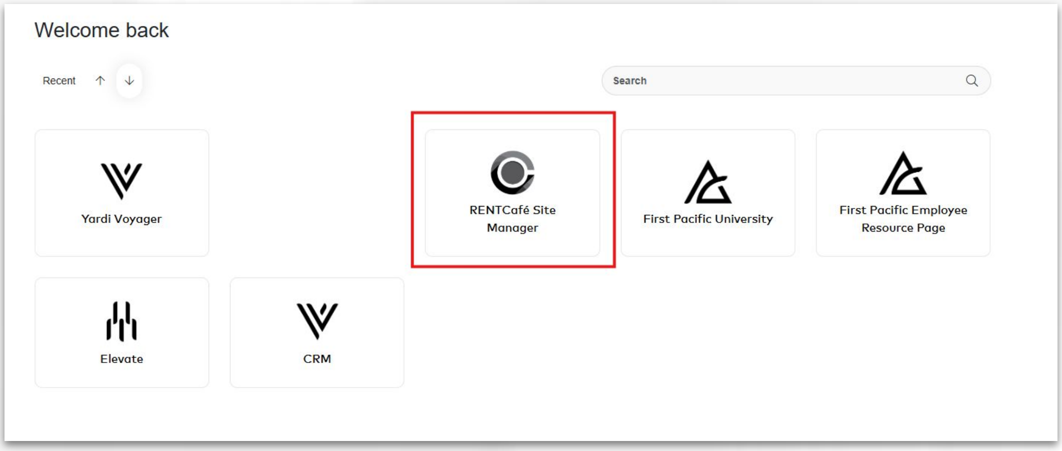


You will be directed to another page in Craigslist that states Further Action is Required.



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.



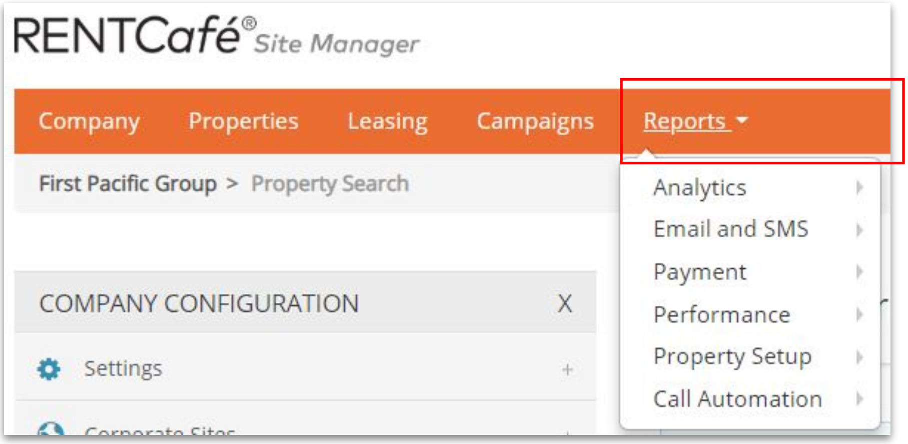
List of Items Done in Site Manager :

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

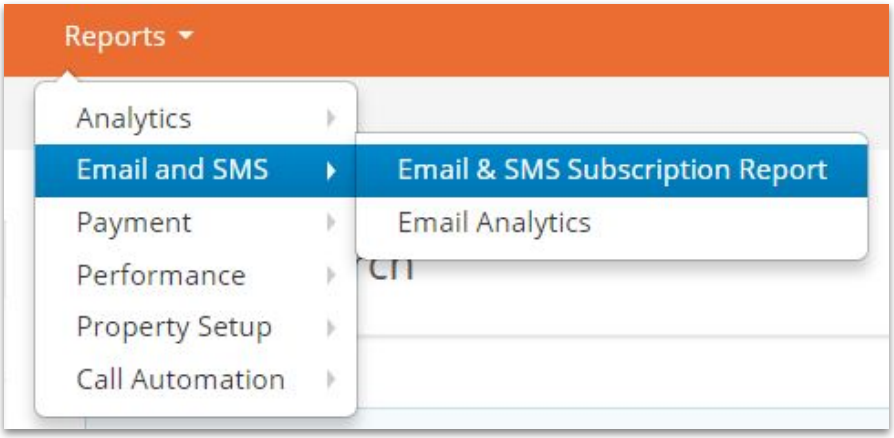
Rent Café Site Manager

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.

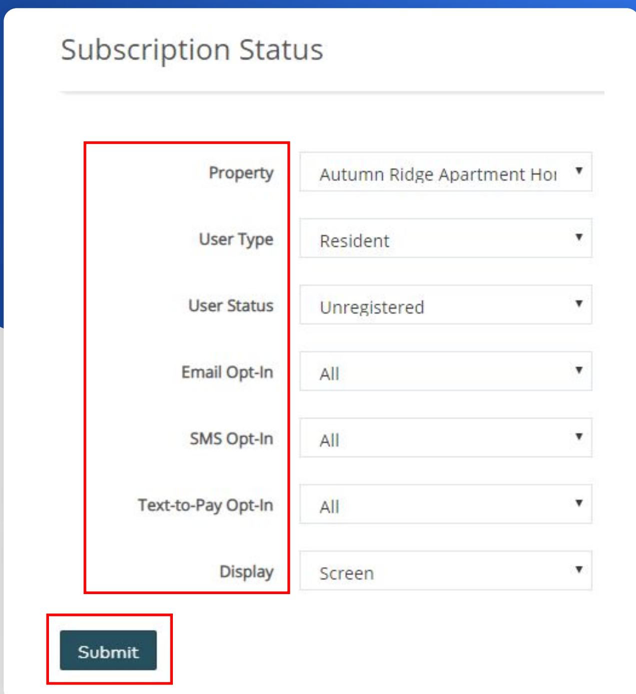


You will see a list of reports that are available to click. One of the most useful reports you will use is the **Email and SMS** subscription report. Use this report to review which prospects or residents opted in to receiving emails, SMS Messages from the property as well as opted in to text-to-pay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



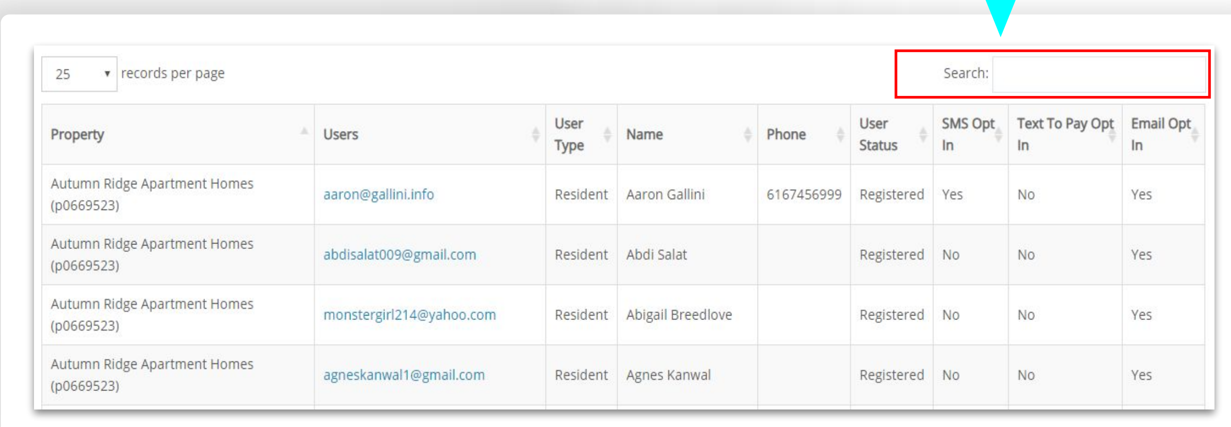
Rent Café Site Manager

Email / SMS Subscription Reports



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

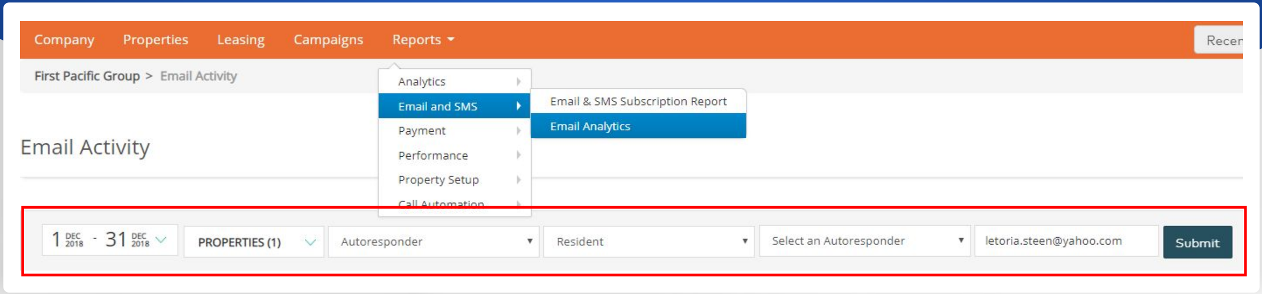
You are also able to export the Email & SMS subscription report into an Excel spreadsheet by selecting the Display drop down under the Filter and selecting Export to Excel and clicking Submit.

Rent Café Site Manager

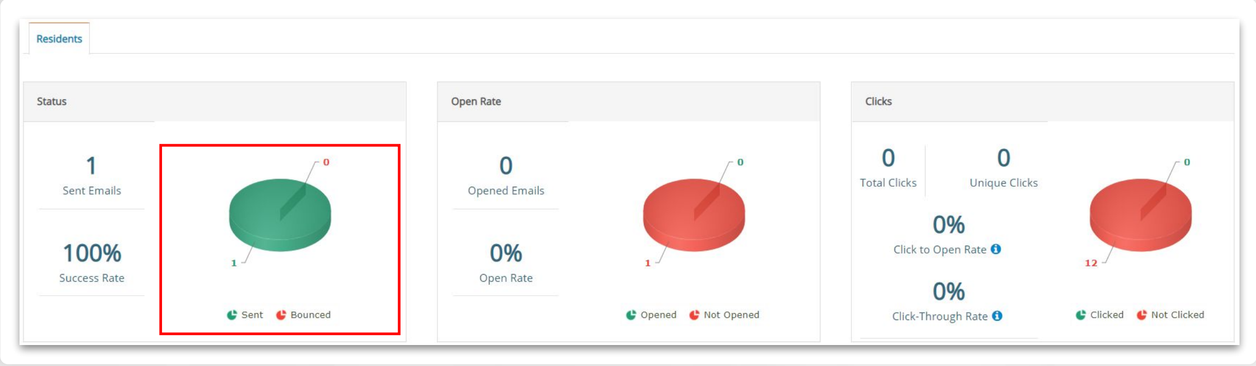
Email Analytics Reports

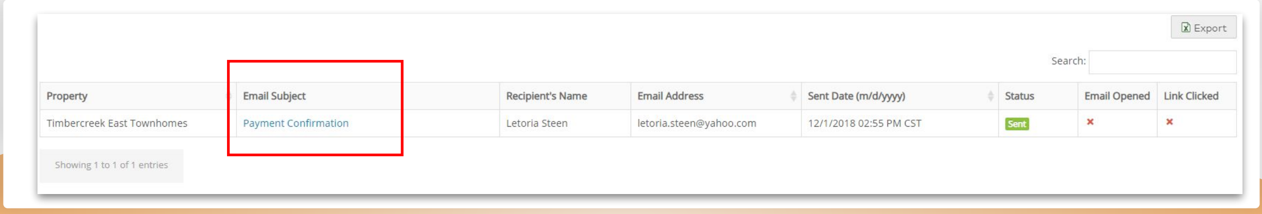
The **Email Analytics** report is another useful report to view what autoresponders have been emailed to residents or prospects. Click on **Reports** then **Email and SMS** and then **Email Analytics**.

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.



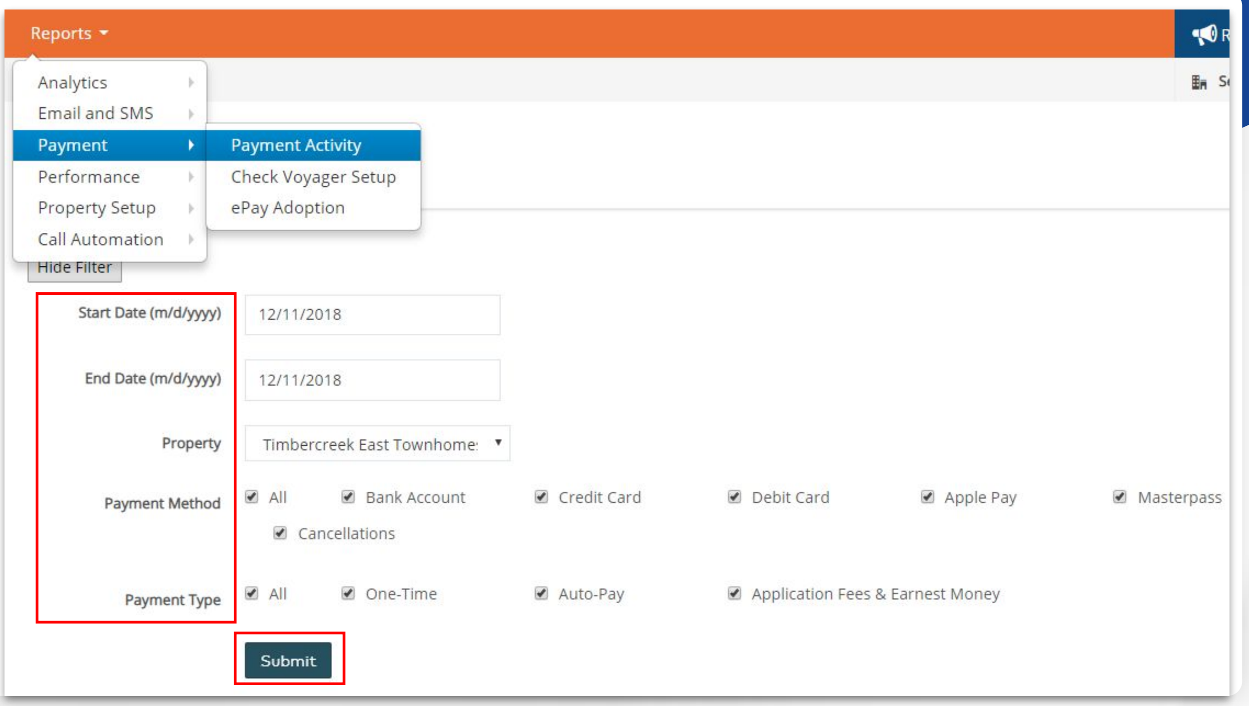


To view the email sent, click on the **Email Subject** hyperlink.

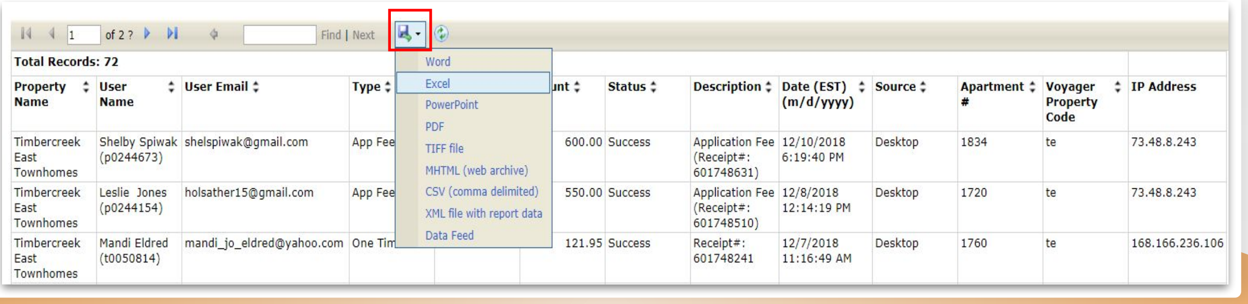
Rent Café Site Manager

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**.



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.



Paperless Items

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

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

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

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

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

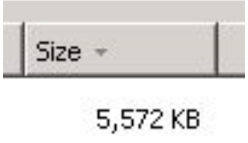
06 Resident Correspondence Log - all resident correspondence should now be entered into CRM IQ memos- refer to CRM IQ memos section of this manual.

Paperless

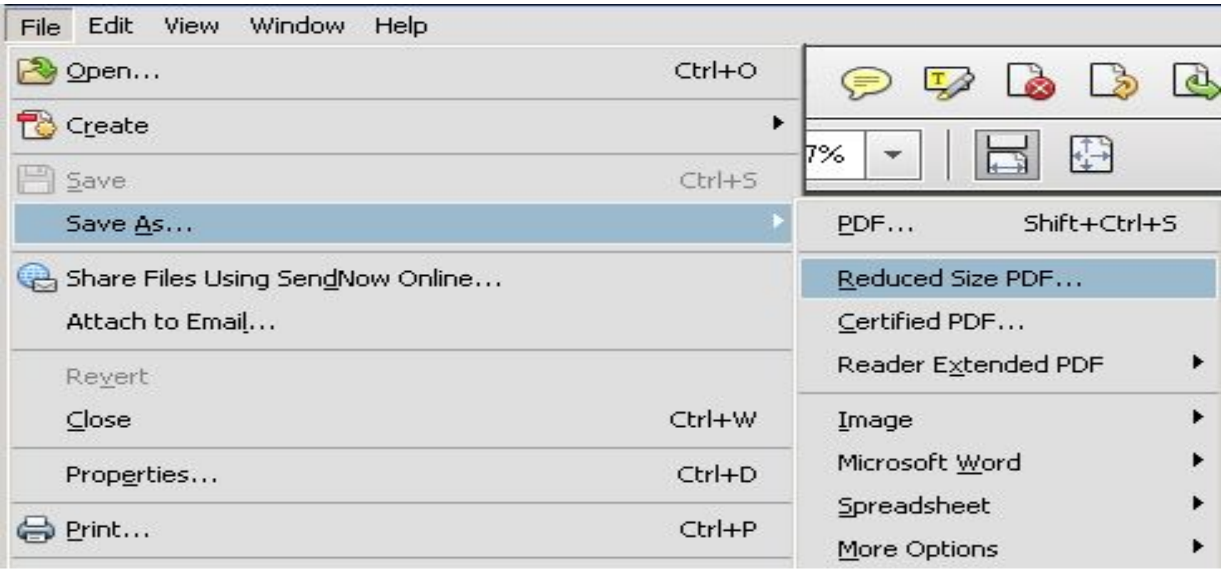
Reducing PDF Size

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

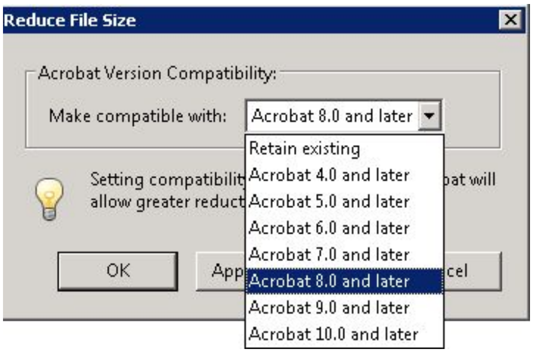
TIP- If your file is over **2MB**, it is best to try and reduce it's size



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

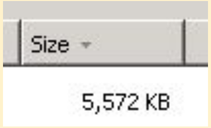


Change the drop down under 'Acrobat Version Compatibility' down to 'Acrobat 8.0 and later'.

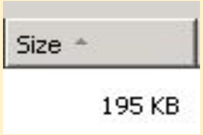


Once you save it, the file size should reduce considerably :

WAS



NOW



Resident Referral Credit

01	Referrals are to be paid after the new resident who moved in has been living in their home for 30 days.
02	The applicant MUST tell the leasing specialist on the initial call who referred them in order for the resident to get credit.
03	The referral credit is to be applied as a one-time concession to the referring resident's account after these 30 days.
04	This slip as well as CRM memo notes should be added to both accounts (please scan and save to resident file as an attachment.)

Resident Referral Credit

New Resident Name :

Apartment :

Move-in Date :

Lease Term :

Referring Resident :

Referring Unit :

Credit Entered by :

Amount :

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

Resident Retention Program

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

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

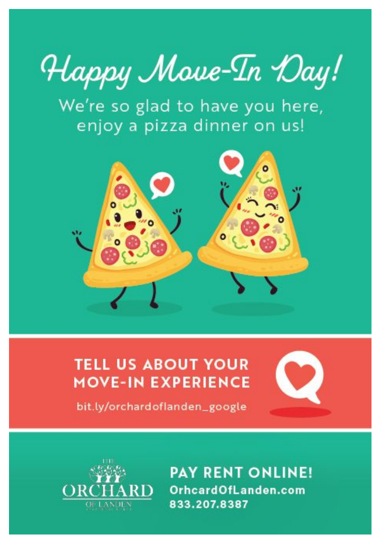
Resident Retention Program

PRIOR TO MOVE IN

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

MOVE IN DAY

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



1 DAY AFTER MI

- VP Letter Emailed

7 DAYS AFTER MI

- Follow-up call on happiness with new home

14 DAYS AFTER MI

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

Resident Retention Program

60 DAYS AFTER MI

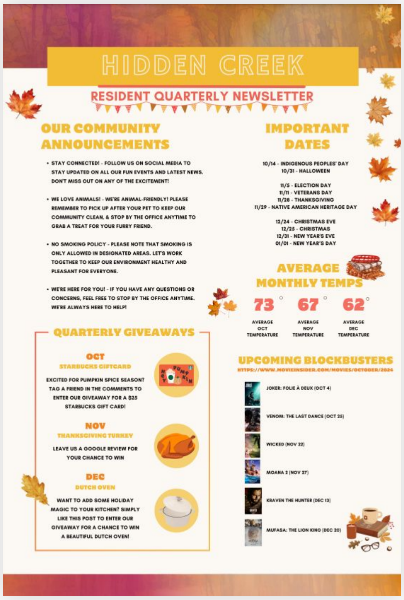
- Follow-up to deliver, “Smile Door Hanger,“ door hanger

90 DAYS AFTER MI

- Follow-up call / SMS to check-in

DURING LEASE TERM

- Ongoing communication, quarterly newsletter and resident events



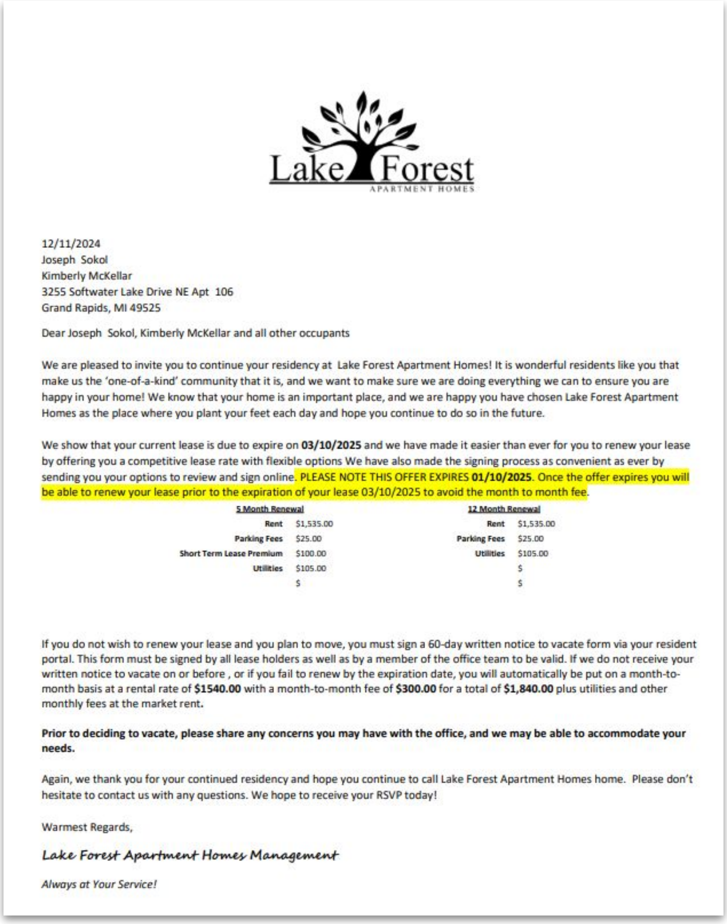
120 DAYS PRIOR TO RENEWAL

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

Resident Retention Program

90 DAYS PRIOR TO RENEWAL

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



Lake Forest
APARTMENT HOMES

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

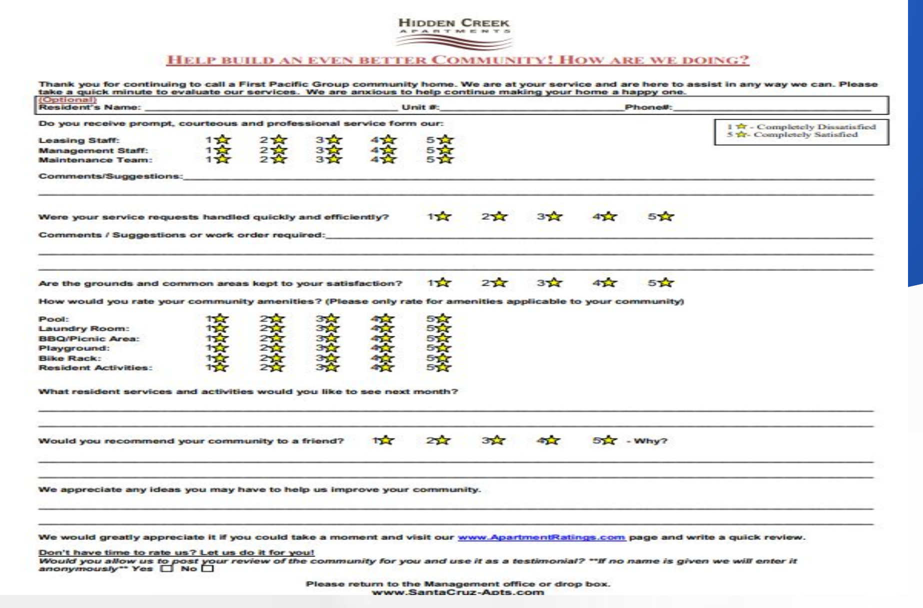
10 DAYS PRIOR TO RENEWAL

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 form our:

1 ☆ - Completely Dissatisfied
5 ☆ - Completely Satisfied

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

Comments/Suggestions: ____________

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

Comments / Suggestions or work order required: ____________

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

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

Pool:	1☆	2☆	3☆	4☆	5☆
Laundry Room:	1☆	2☆	3☆	4☆	5☆
BBQ/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?

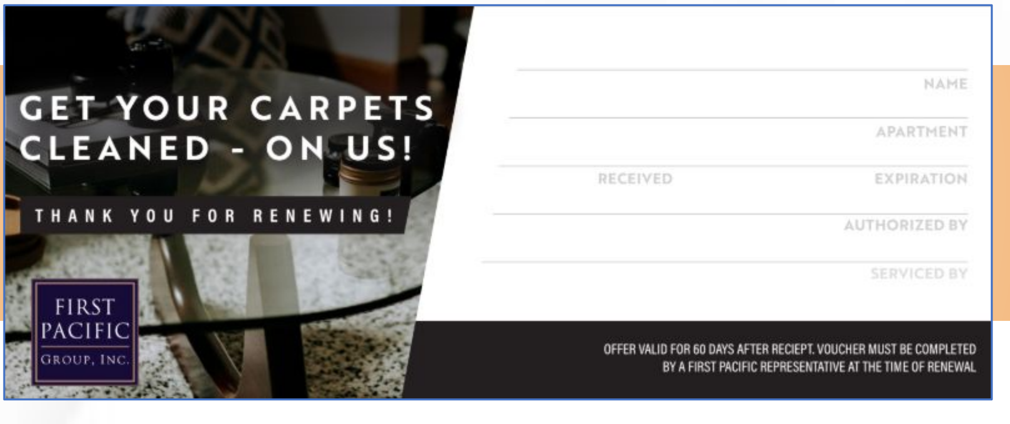
We appreciate any ideas you may have to help us improve your community.

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.



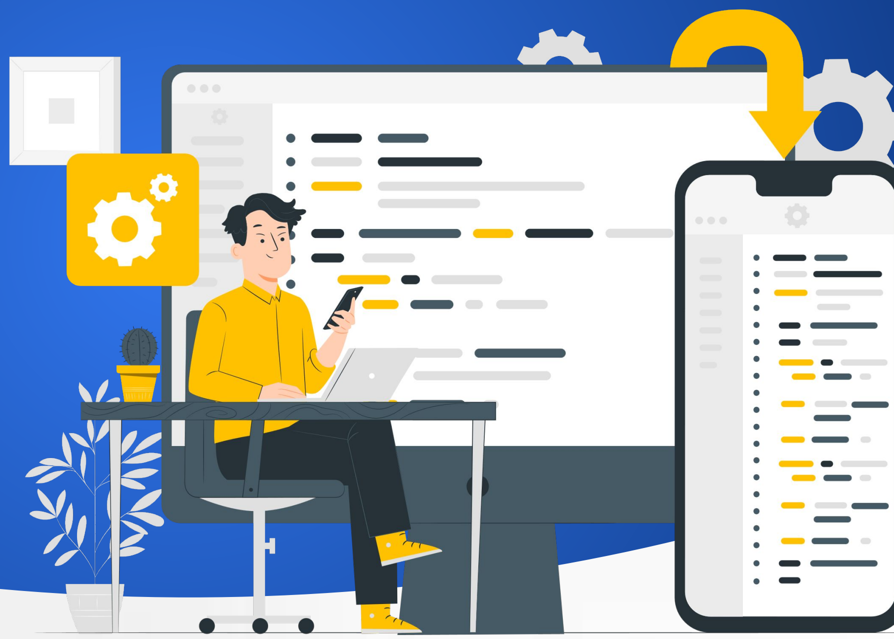
Resident Retention Program

AFTER APARTMENT RATING REVIEW

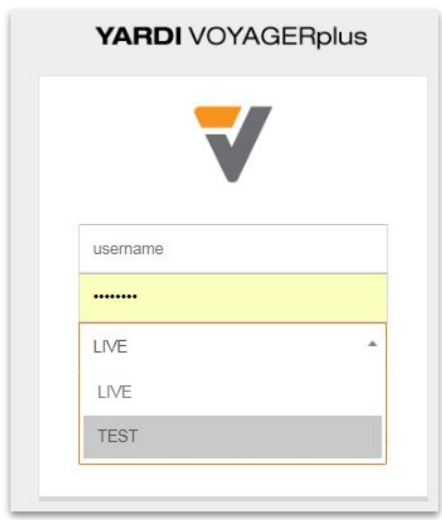
Send a personal thank you card with a gift card once approved by the regional manager.

CRM IQ

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

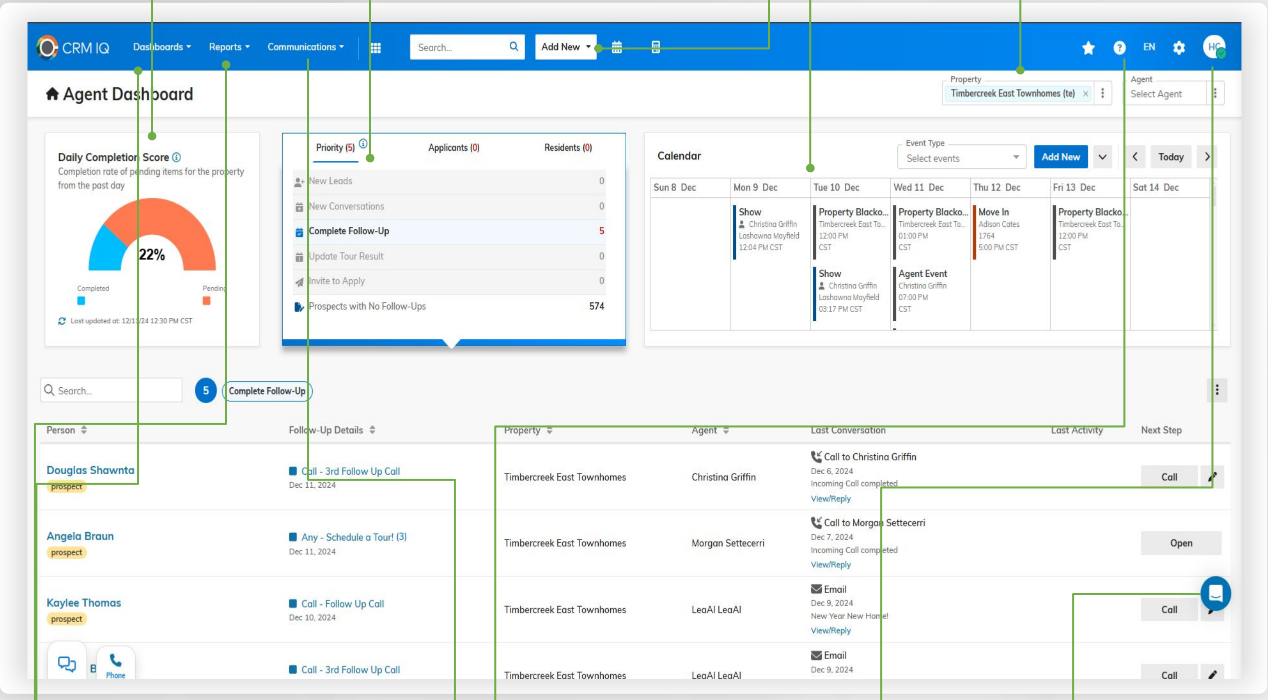
Daily Completion Score: Designed to track your progress throughout the day. You can update this about every 5 minutes.

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

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

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

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

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

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

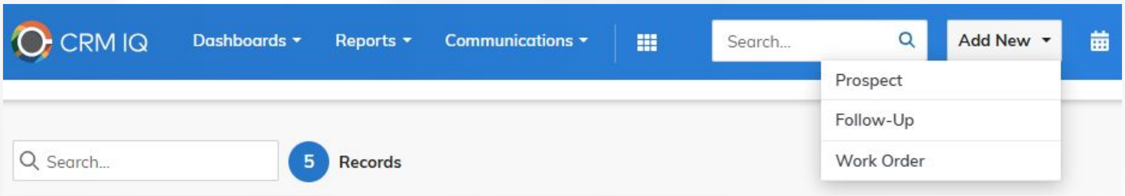
Communications: Primarily used for Marketing you can review analytics, create campaigns, and send eblasts. *Permission Required to use*

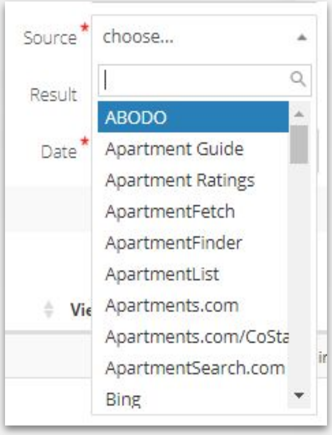
Profile: Click here to update your email signature, e-sign signature, switch to dark/light mode, update your profile, mark yourself as available/busy/away, change systems, or simply just log out.

CRM IQ
Guest Card

Entering Prospect/Guest

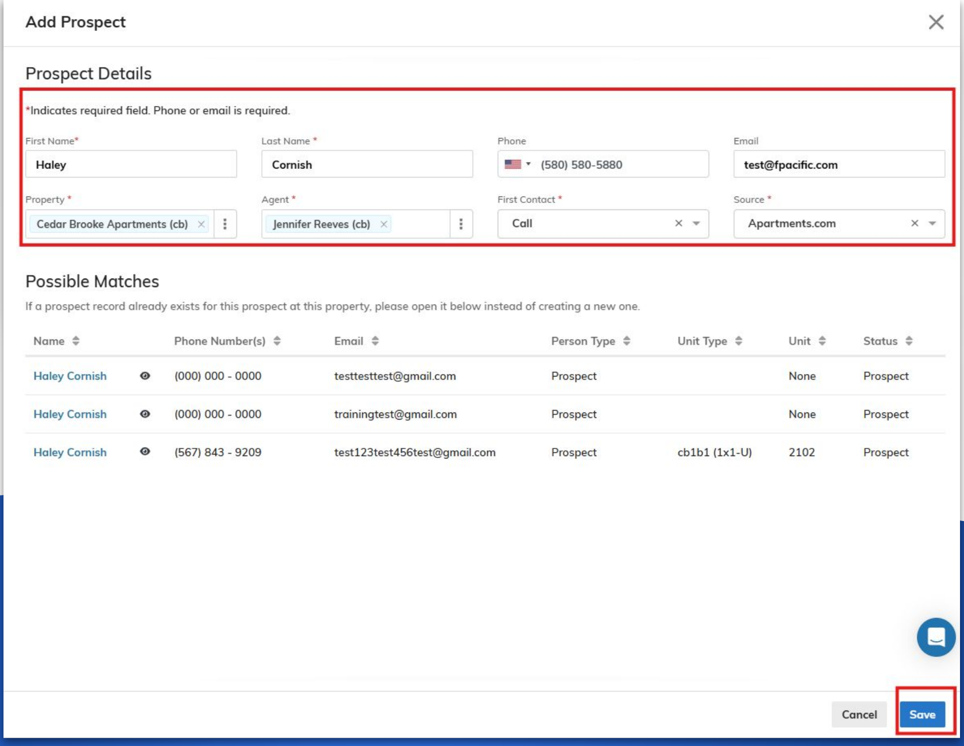
Click on Add New → Select Prospect → Enter Information → If there are possible matches it will show below → If none match click Save.





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.

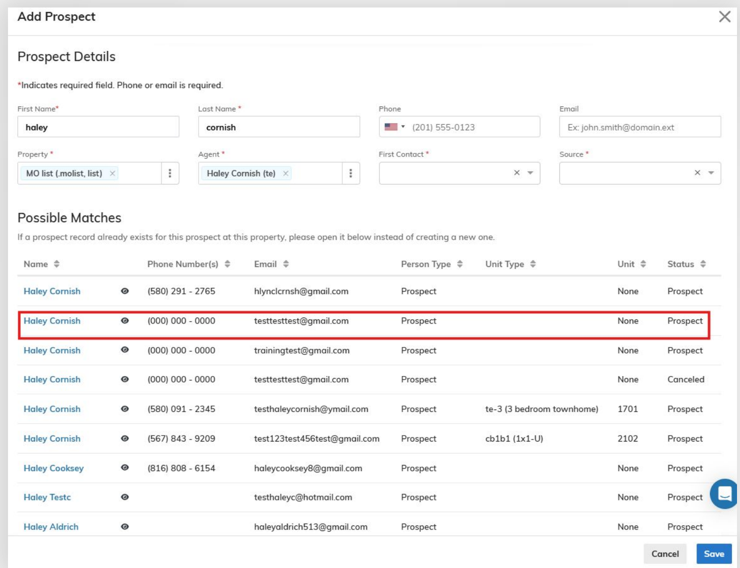
When entering a new guest, all the fields with red asterisks are mandatory fields that you must fill in in order for it to save. It is important for you to enter all the relevant information into each field section to serve as a reminder to what the prospect is looking for, if they have pets, when they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



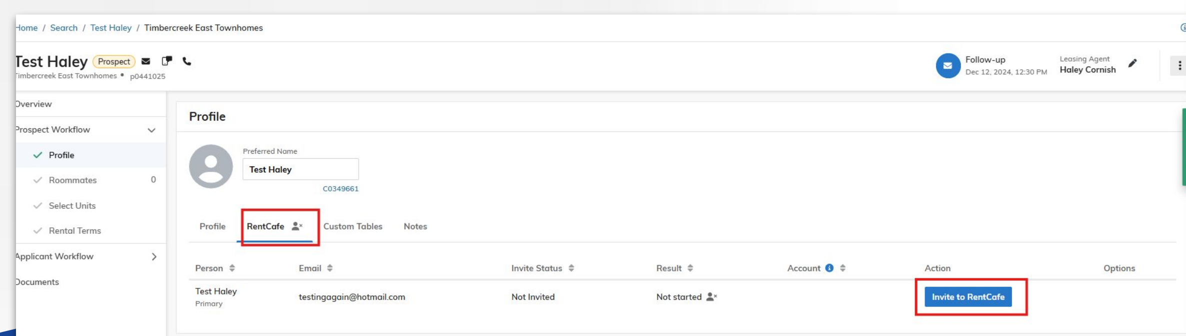
CRM IQ
Guest Card

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.



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.



CRM IQ
Search

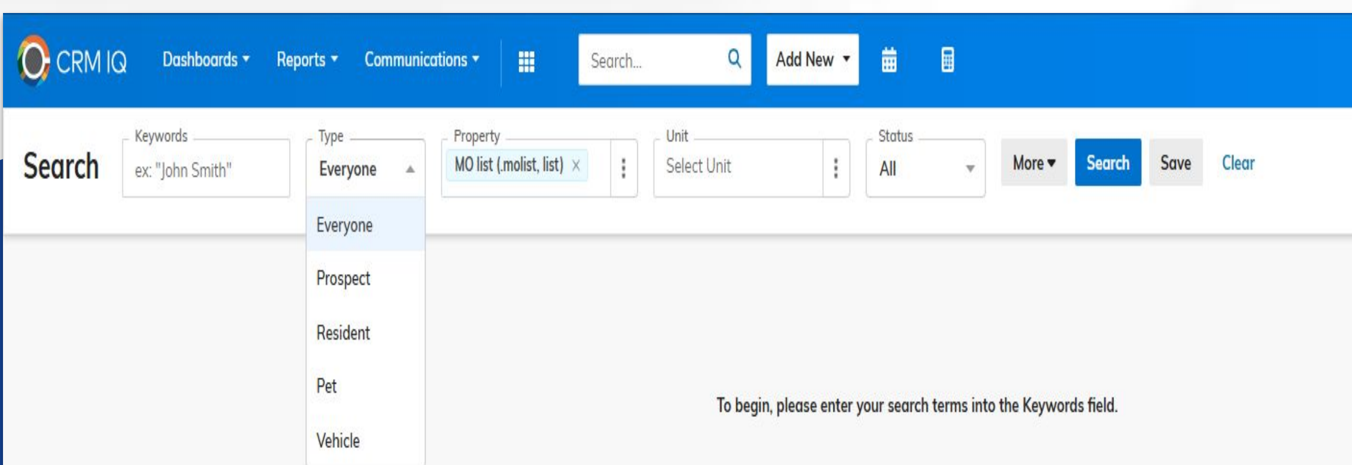
01

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

02

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

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



CRM IQ Unit Availability Report

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

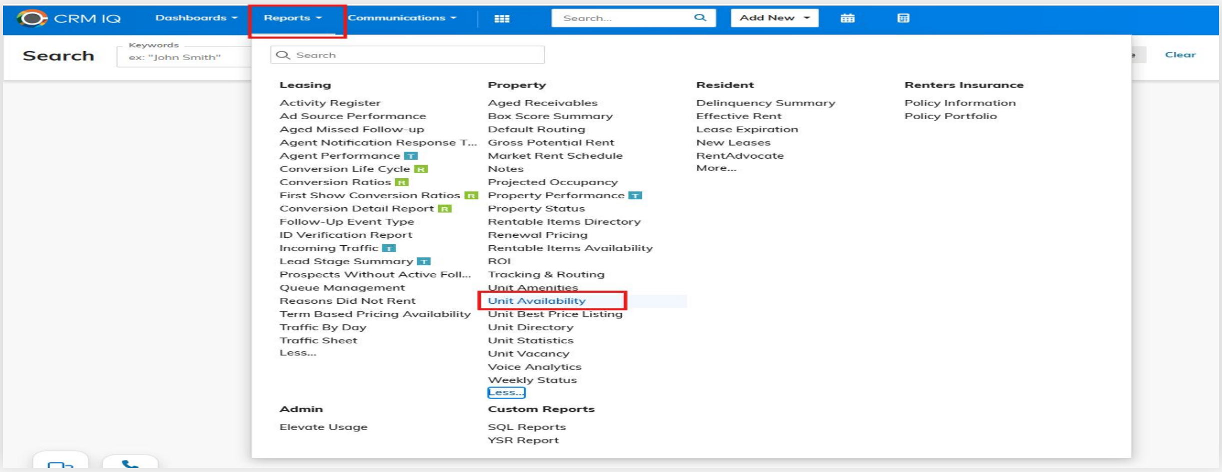
02 The instructions below show how to pull the Unit Availability Report through CRM IQ Reports.

03 Only managers will have access to change the notes field.

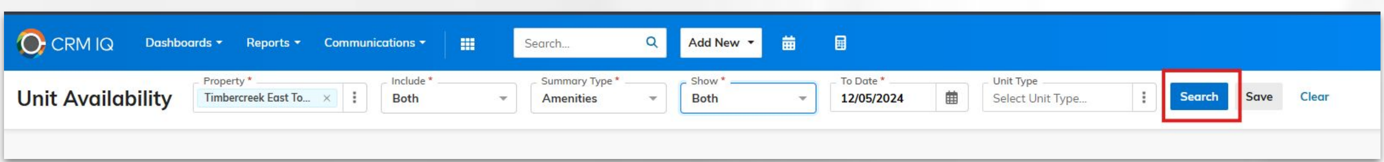
04 A copy has also been saved to your site server under office forms.

CRM IQ
Unit Availability Report

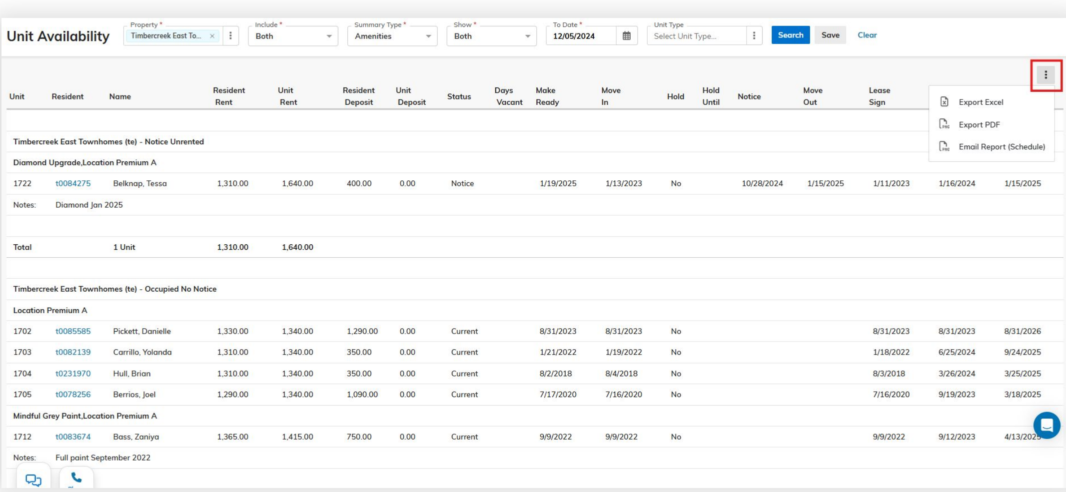
01 Pull the Unit Availability Report by going to Reports □ Click More… □ Unit Availability



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

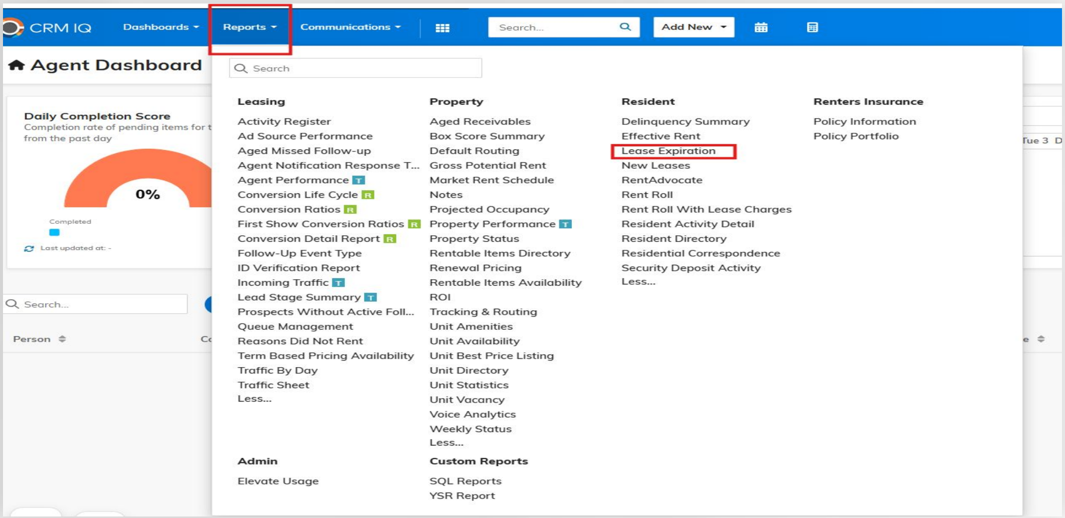


03 Once the report populates, you can download it in either PDF or Excel to print if necessary.

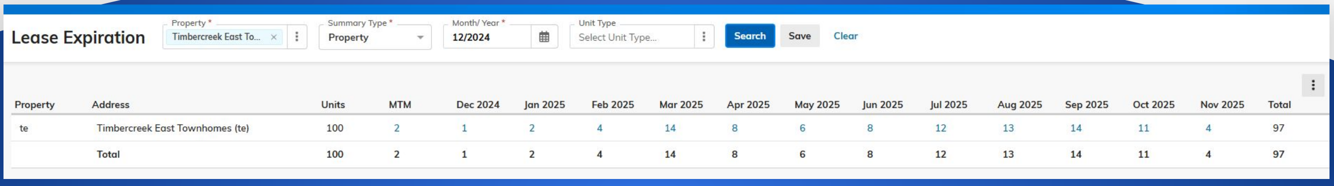


CRM IQ
Lease Expirations

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



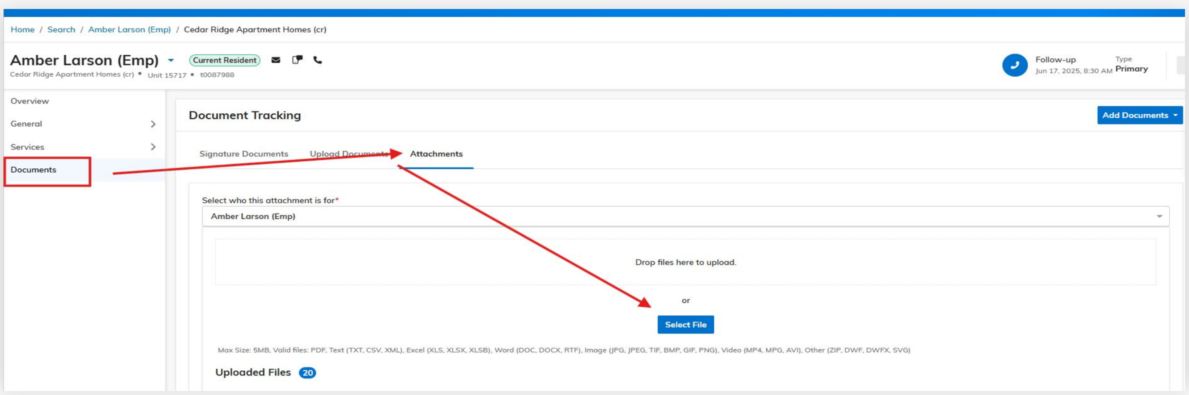
- Enter the filters for Property and month period you are looking for. Then hit Search and the screen below will show. You are able to drill down on any of the blue numbers for more information on the residents expiring that month.



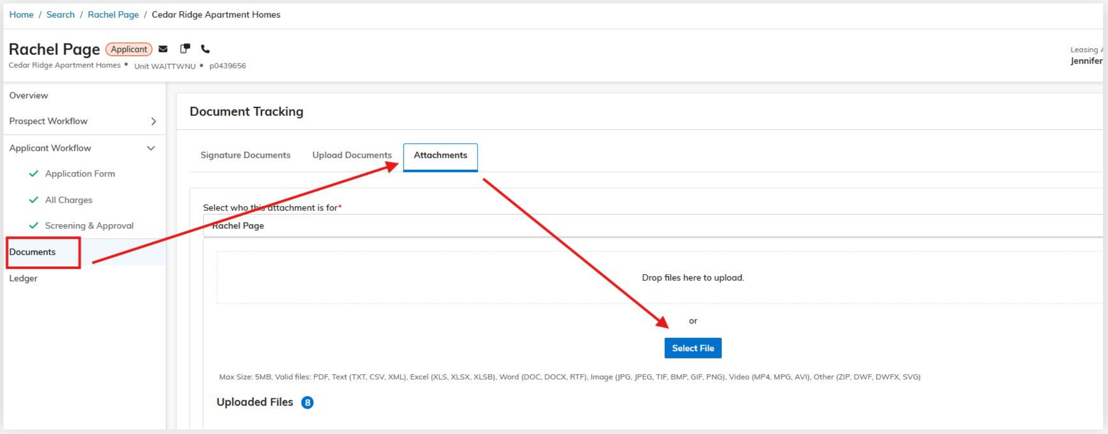
Property	Address	Units	MTM	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Total
te	Timbercreek East Townhomes (te)	100	2	1	2	4	14	8	6	8	12	13	14	11	4	97
	Total	100	2	1	2	4	14	8	6	8	12	13	14	11	4	97

Adding Attachments
IN CRM IQ

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



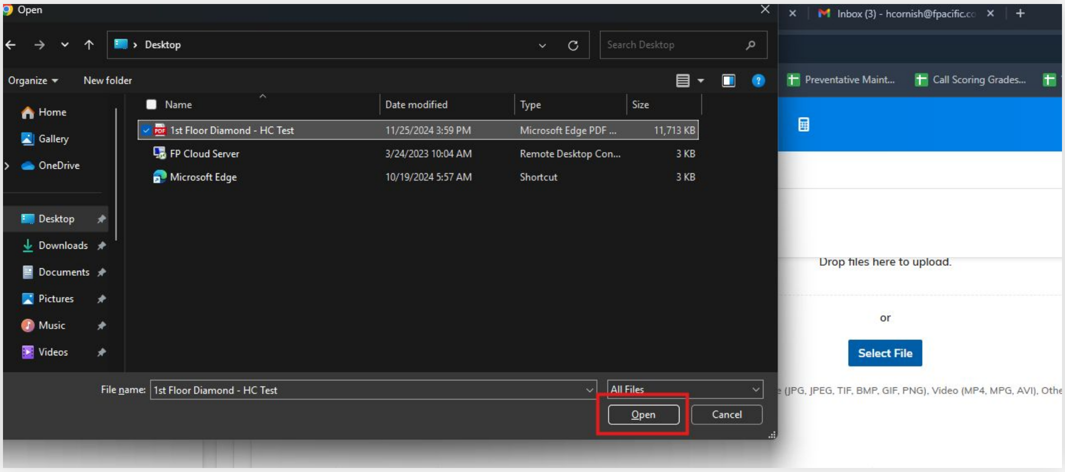
To add attachments to guest cards, go to the Applicant's Profile screen and click the **Attachments** hyperlink



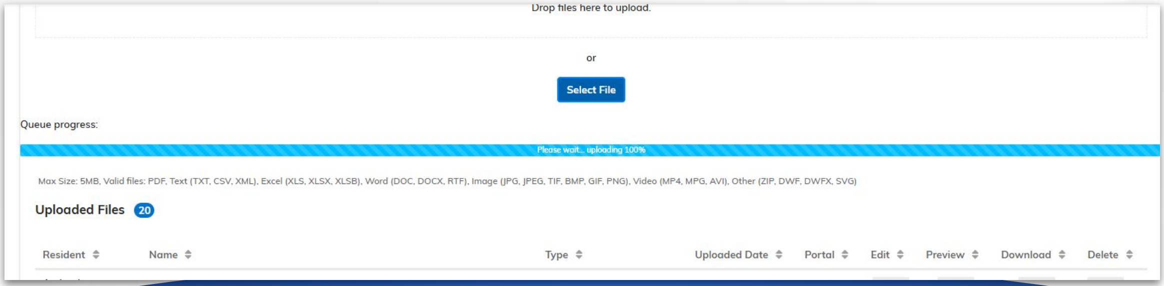
Once on the Attachments screen, click on the **Choose Files** button.

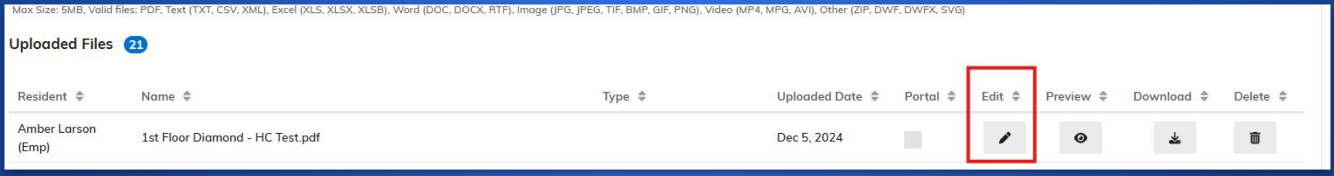
Adding Attachments
IN CRM IQ

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.

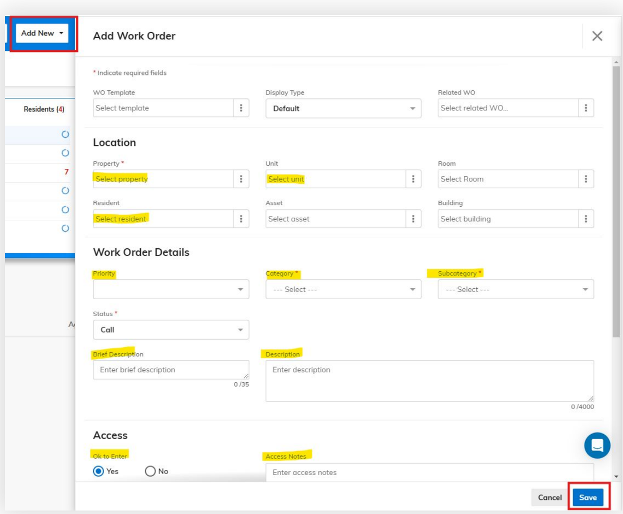
- If the resident test positive for COVID and it is an emergency our maintenance team will need to suit up and perform the work.

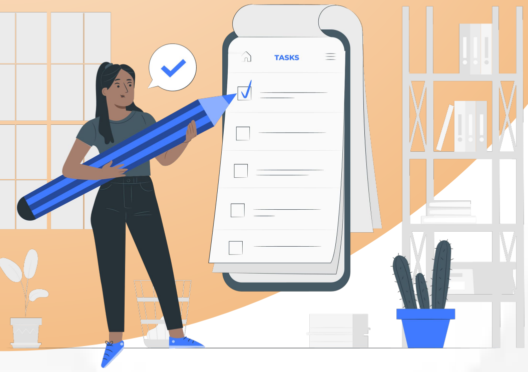
- If the resident test positive for COVID and it is NOT an emergency the work order will be put on hold until the resident is no longer positive.

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





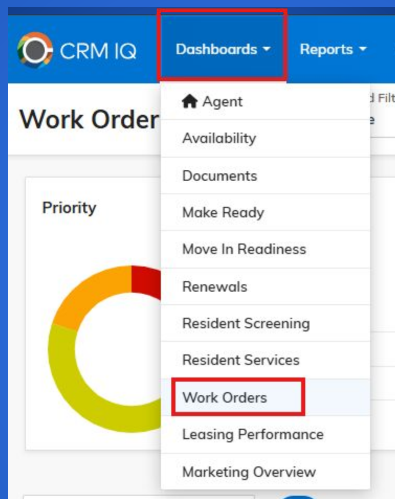
Printing Work Order/Tech Notes

- 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.

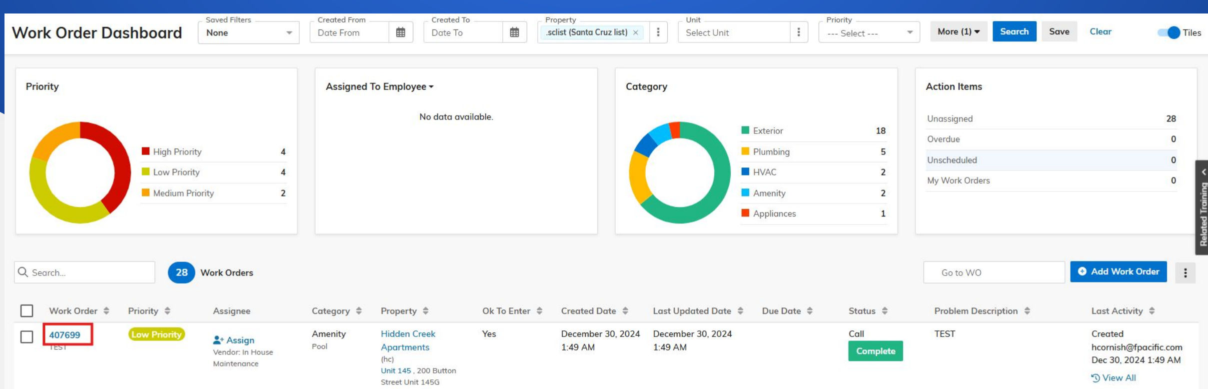
CRM IQ

Closing Out Work Orders

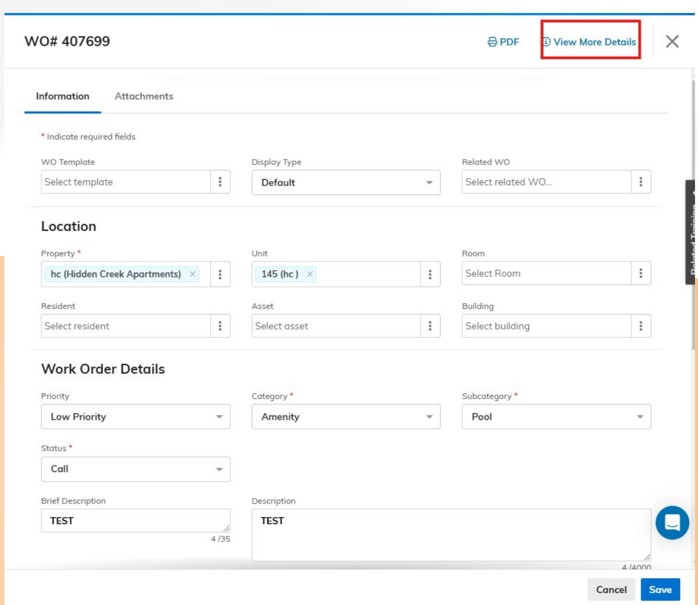
- To close a Work Order go to the work order Dashboard in CRM IQ.



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



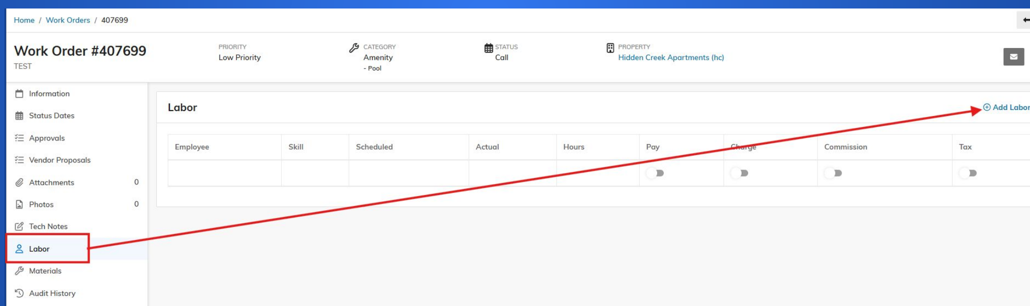
- After clicking the hyperlink a the work order details will appear. Click View More Details in the top right corner to add the techs labor times.



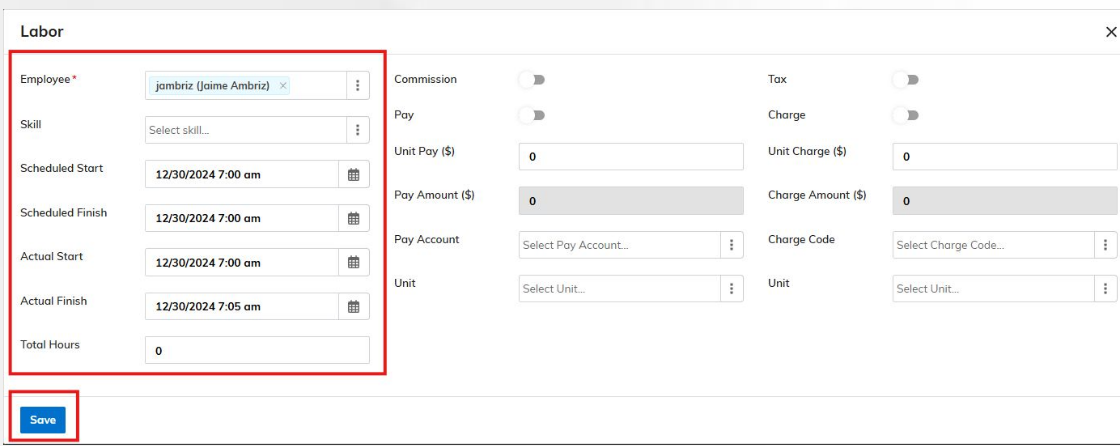
CRM IQ

Closing Out Work Orders

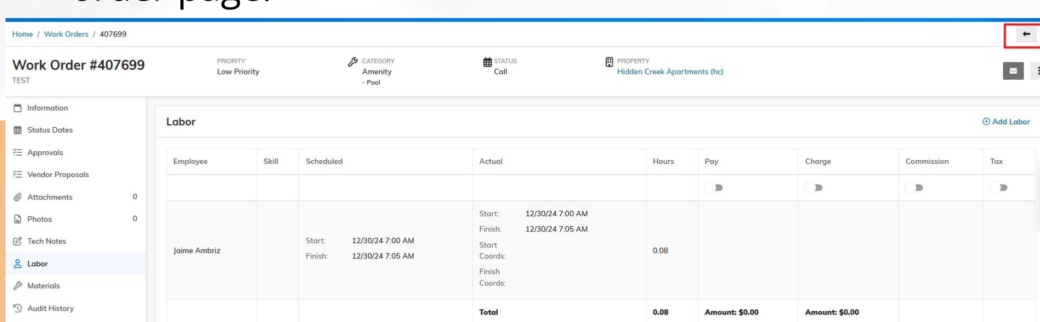
- Click Labor on the left side menu and then click + Add Labor.



- 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.**

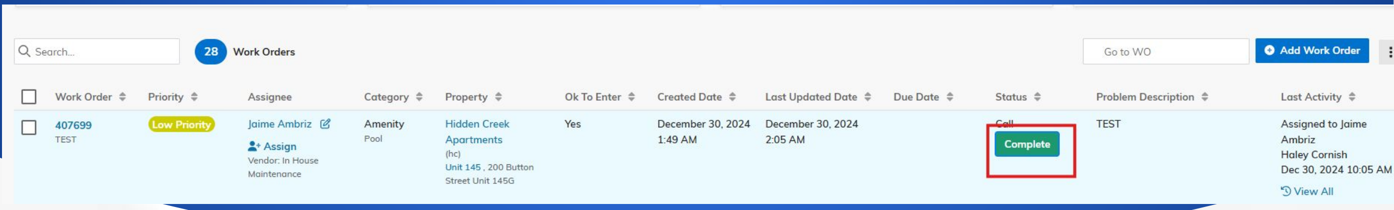


- After clicking save it will show you the labor added. Click the back button **twice** to go to the main work order page.



Closing Out Work Orders

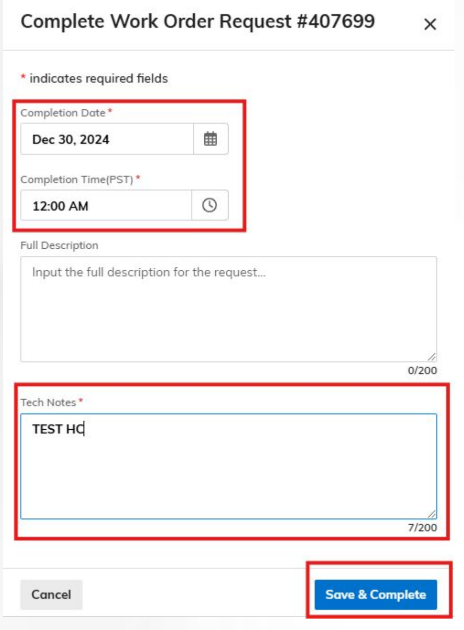
- Once returned find your work order and click Complete



- 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.**

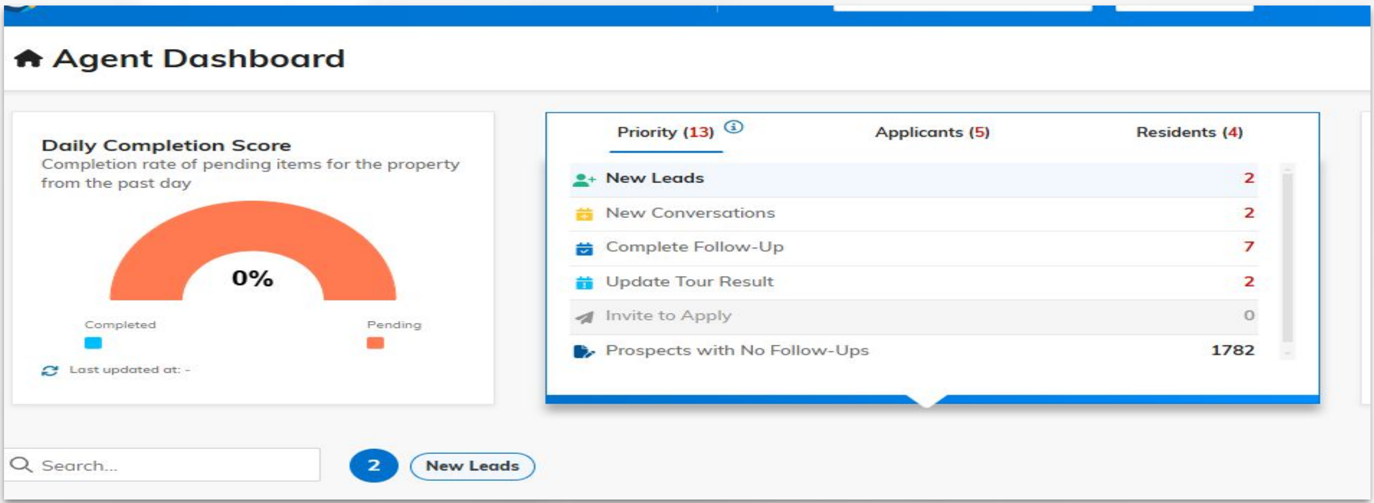


- The WO is now completed in Yardi and will no longer show on your dashboard.

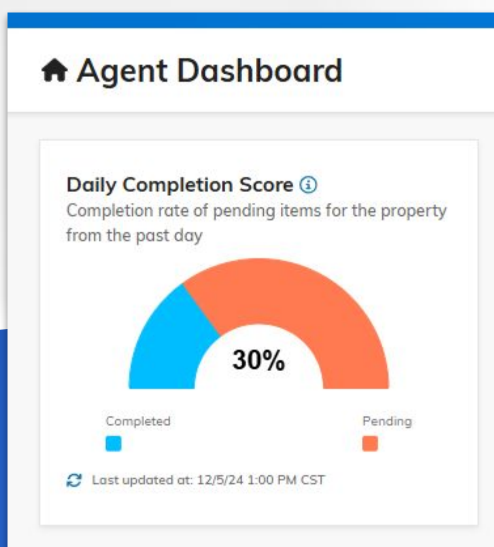
  If the WO had "chargeback" resident noted, then these charges should be added to their ledger and the resident notified of their balance due. You will then stamp the WO as "entered" and write your initials.

CRM IQ Queue

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



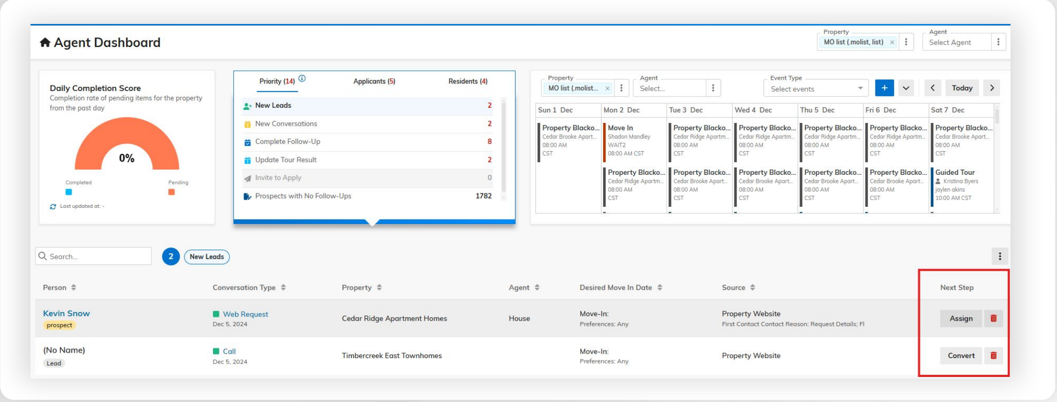
The Daily Completion Score tracks the Completion rate of pending items for the property. Your goal is to be at 100% before you leave for the day. You are able to refresh this about every 5 minutes.

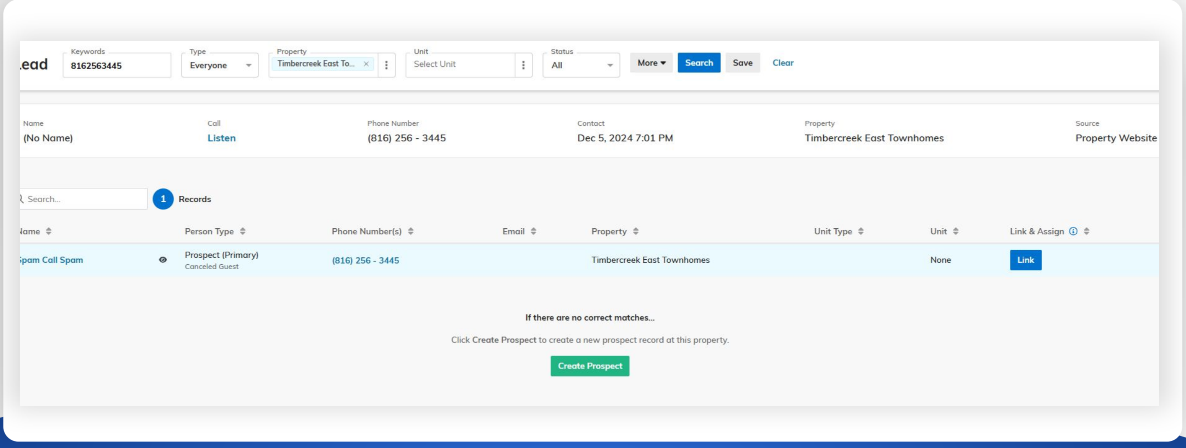


CRM IQ New Leads

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

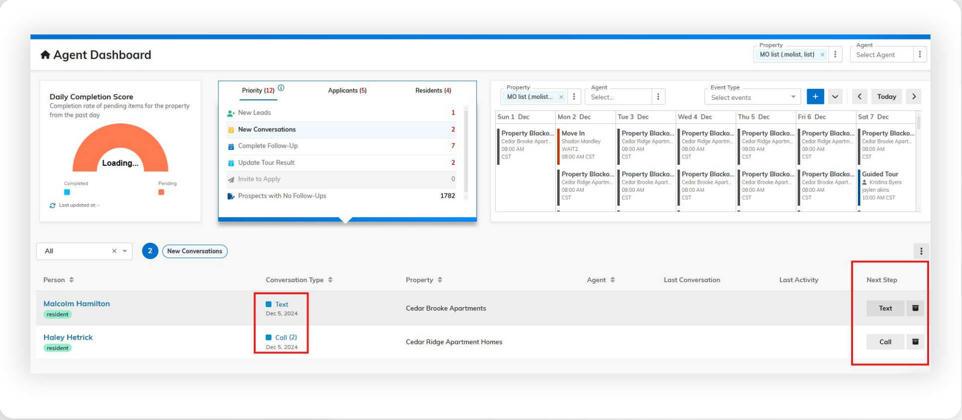
If it is a lead you will click Assign and select an agent. If the next step is Convert then you'll see if there are any possible matches for this number or create a New Prospect.



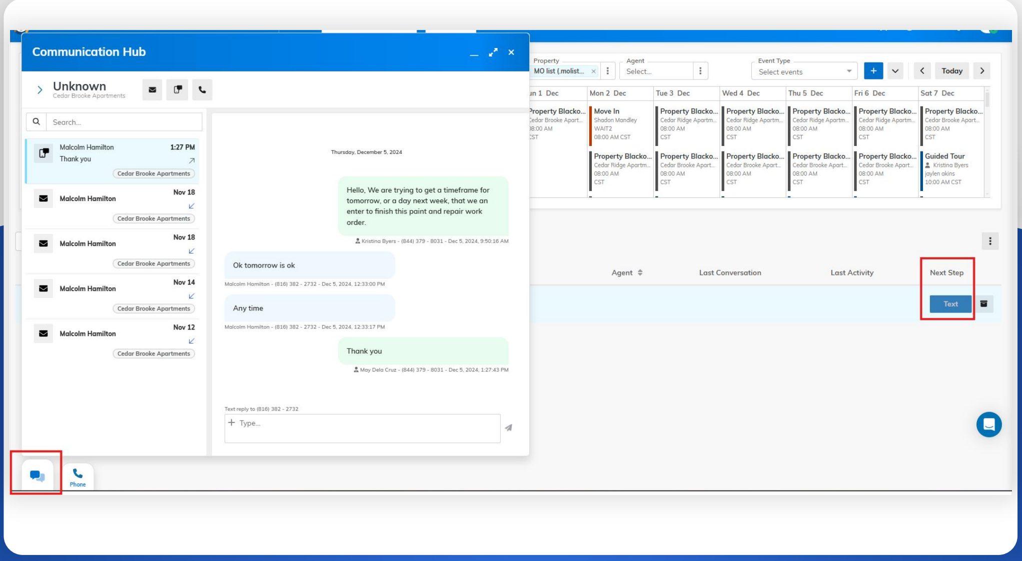


CRM IQ
New Conversations

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



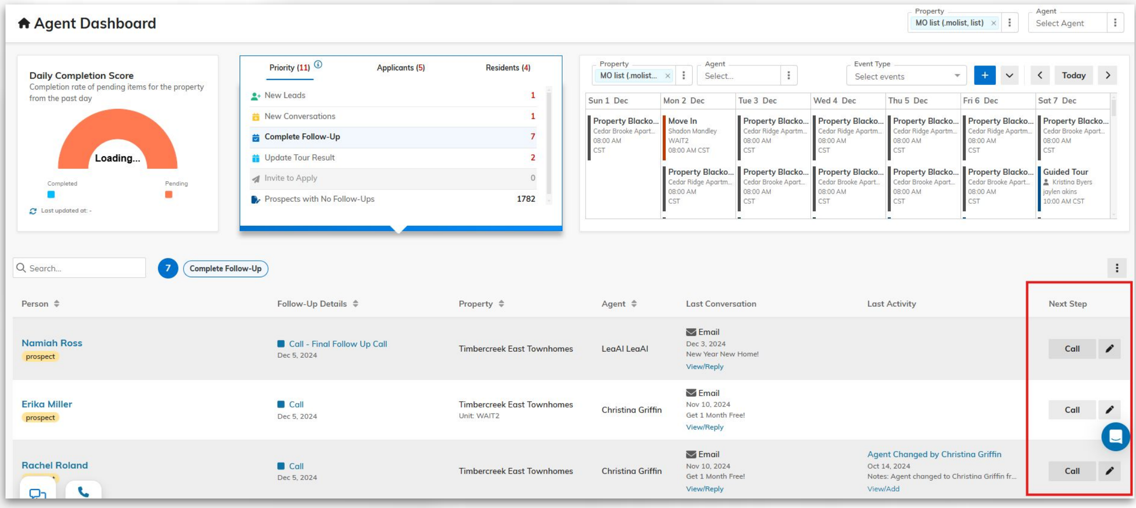
Once you click the hyperlink or the word associated with the next step the Com-Hub will pop up for you to respond. Note: You can access the Com-Hub no matter what screen you are in.



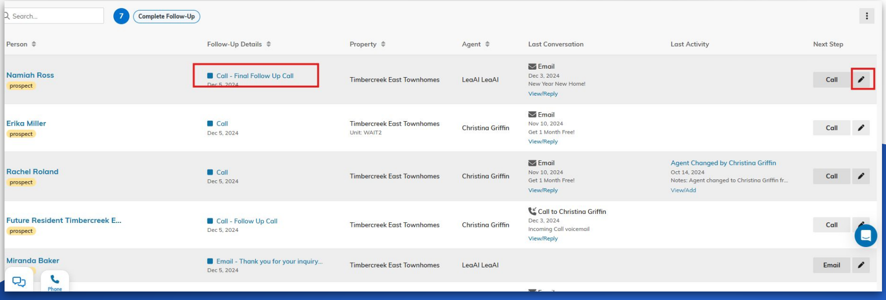
CRM IQ

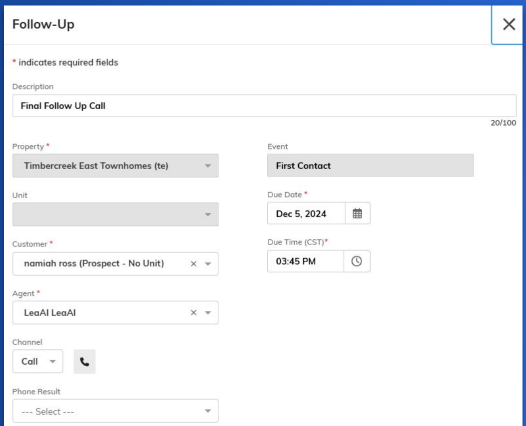
CRM IQ
Complete Follow-Up

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



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.

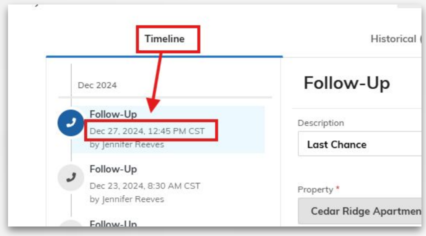




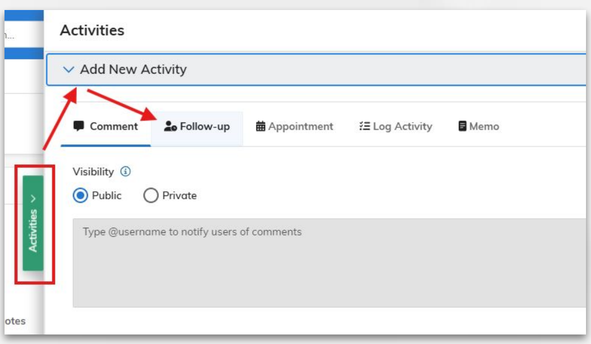
CRM IQ
Deactivating Follow ups

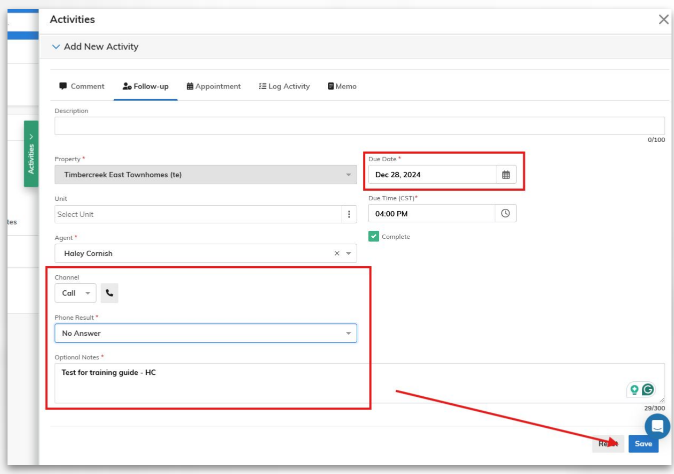
We should NOT be deleting any guest cards out of our system. Instead, we need to deactivate the follow ups, so we aren't spamming prospects if they're uninterested.

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



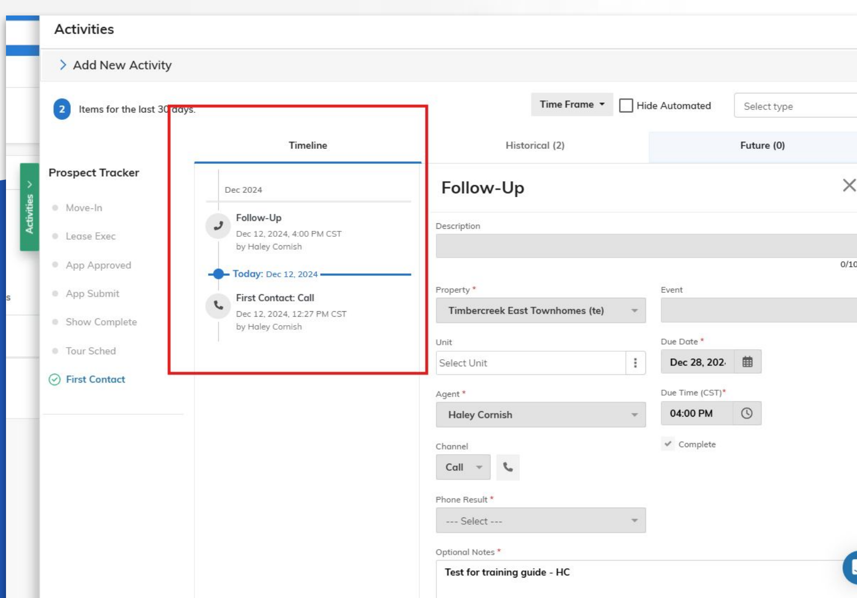
Once click Activities located on the right side of the profile view the timeline to determine the last follow up due. Then you'll click Add New Activity → Follow up → Change Due date to the day AFTER the last follow up → Select the channel, result, and add your notes → Click the Complete Box → Save.





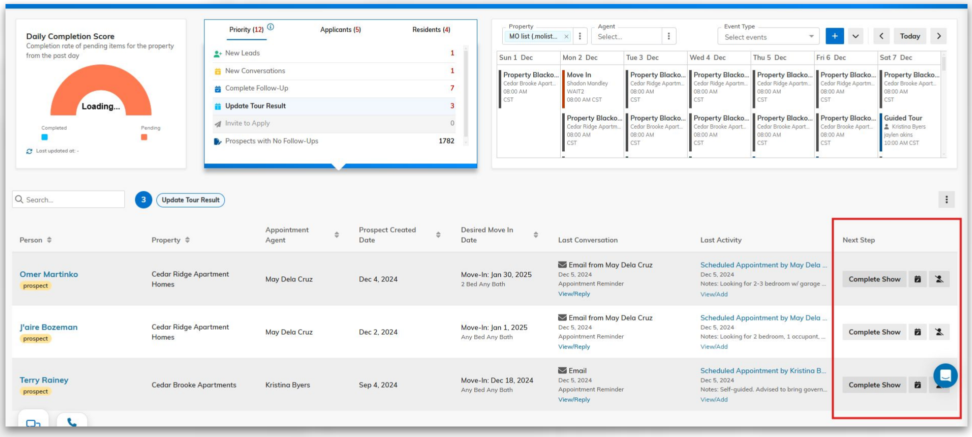
Once completed

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

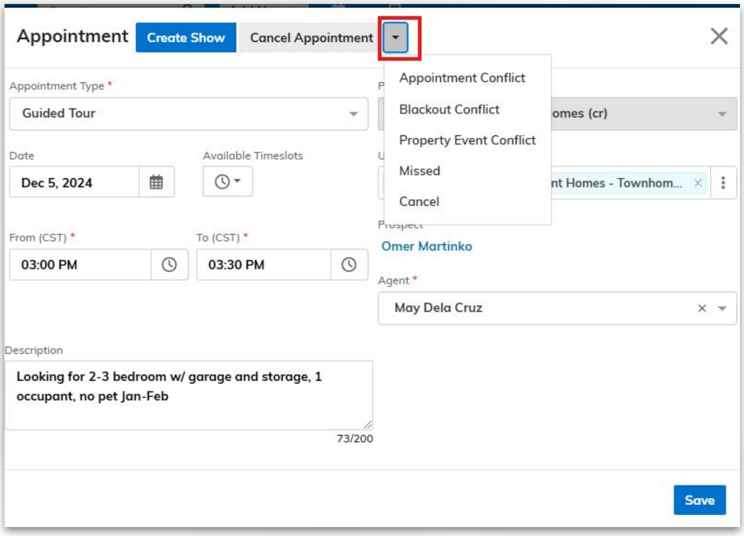


CRM IQ
Update Tour Results

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



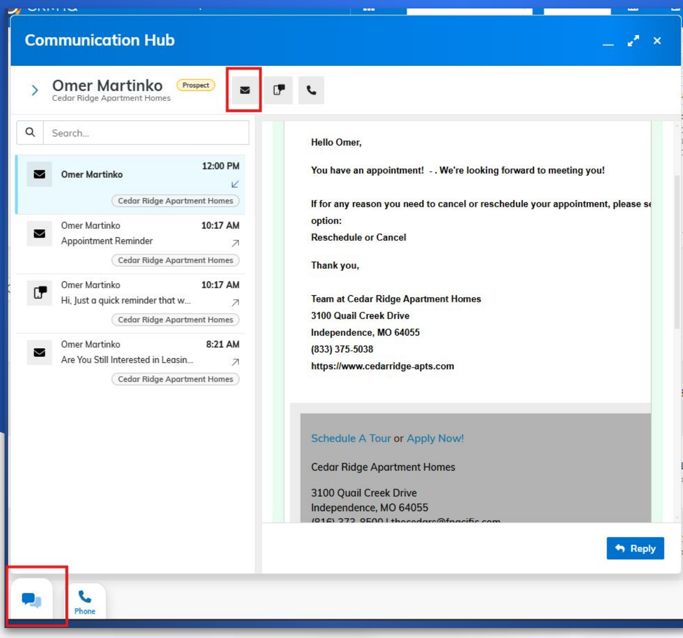
Once you click Reschedule you can change the date / time or if it was missed click the drop down and select your reason.



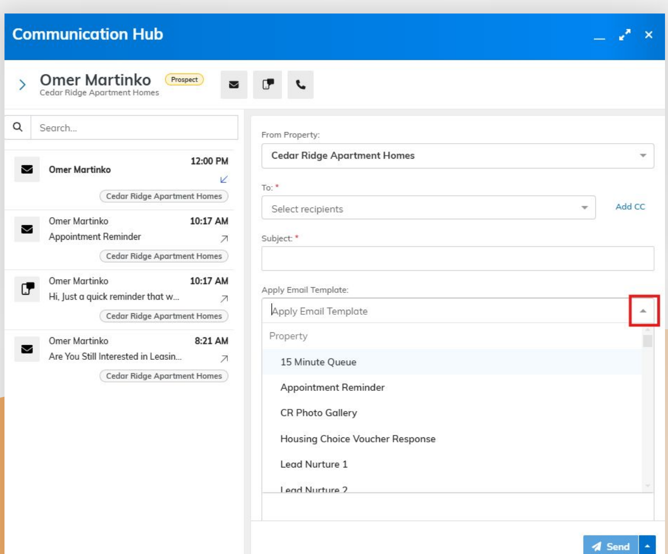
CRM IQ Email Templates

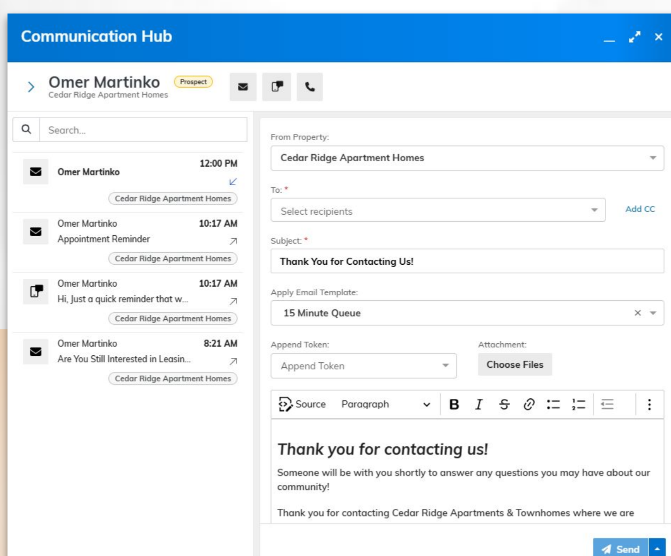
All email communications will be created directly from the Com-Hub. You have multiple ways to access this. You can search the prospect / resident, simply click the com-hub, or click on a task in your queue box to access it.

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.





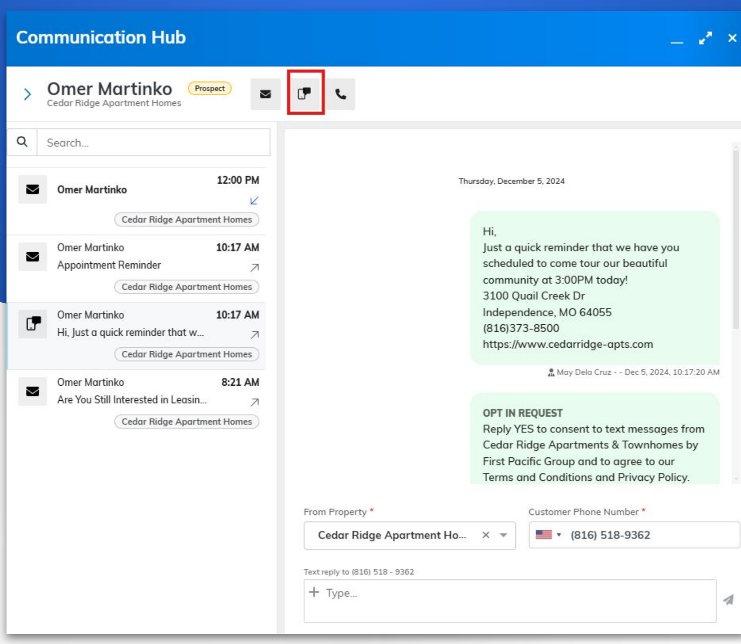
CRM IQ

CRM IQ Text Templates

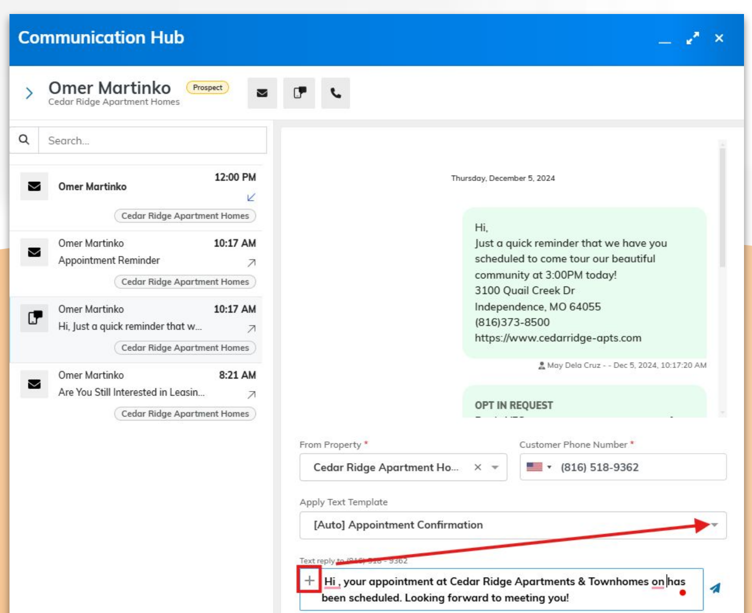
All email communications will be created directly from the Com-Hub. You have multiple ways to access this. You can search the prospect / resident, simply click the com-hub, or click on a task in your queue box to access it.

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.



CRM IQ

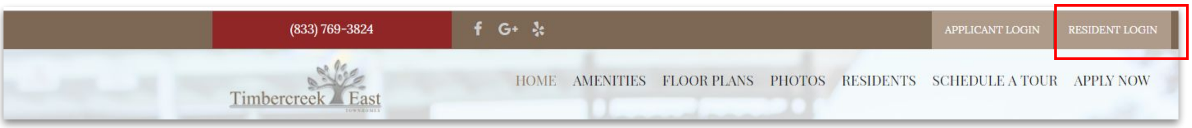
Resident Portal

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

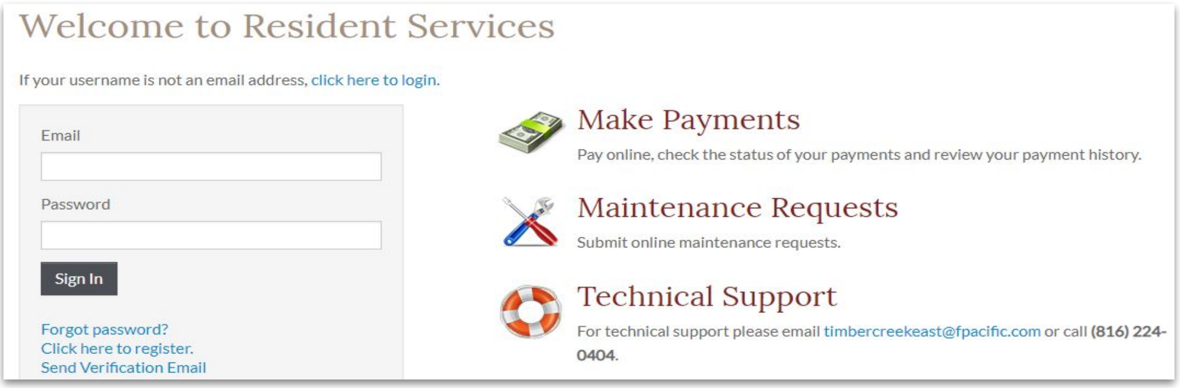
- Set up one-time and recurring payments
- Edit their profile
    - Update Email Address
    - Update Phone number
    - Subscribe to Email and SMS Notifications
    - Update vehicle Information
- Change Password
- Submit Maintenance and Office Requests
- Select lease renewal proposals
- Sign lease documents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



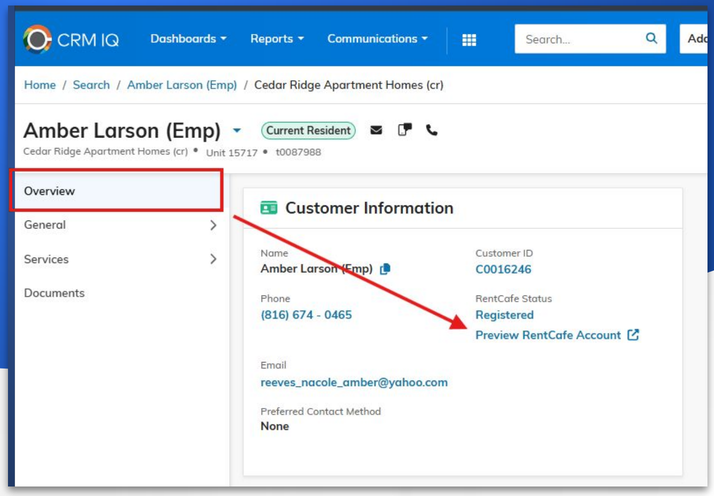
CRM IQ

Resident Portal

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

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

Clicking the link will pop open the Resident Portal window.



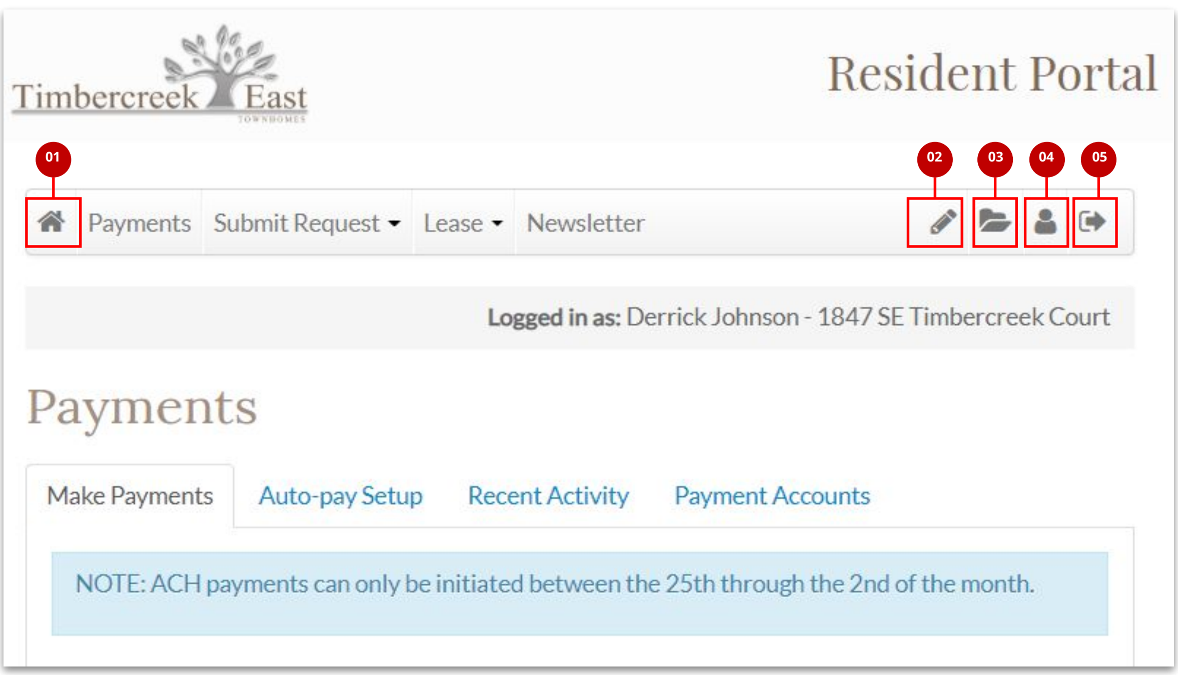
Home

Sign Documents

Online Documents

Profile

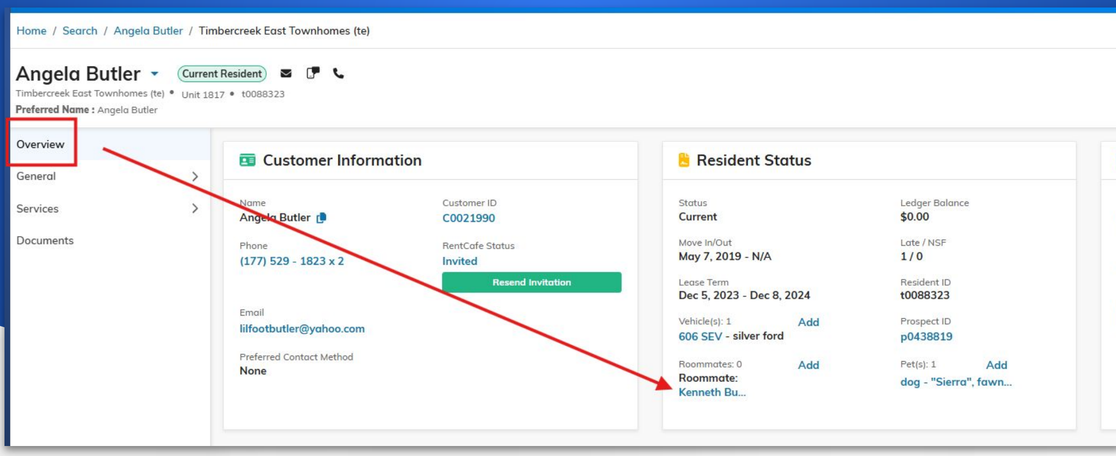
Sign Out



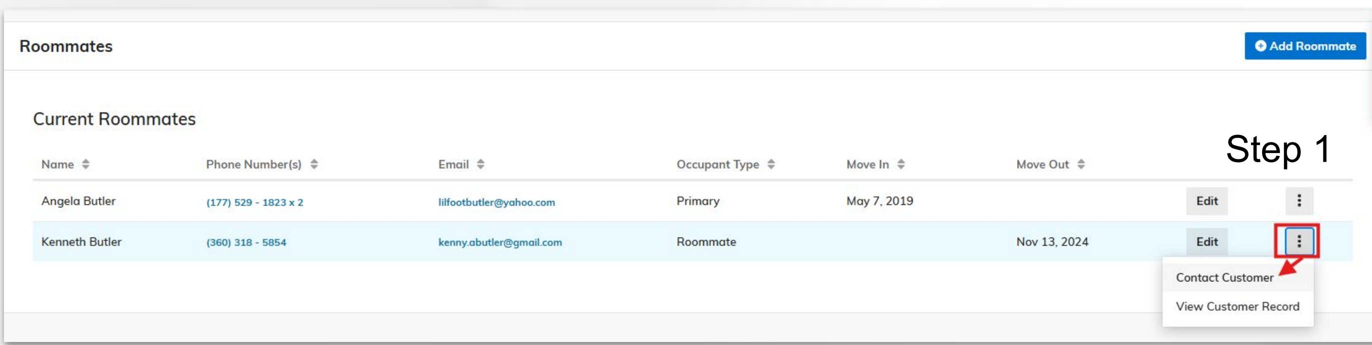
CRM IQ

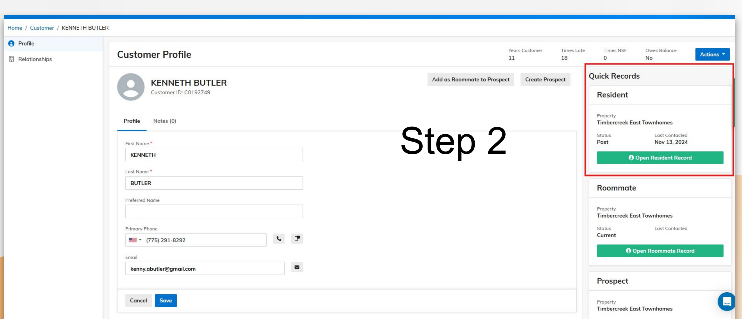
Resident Portal

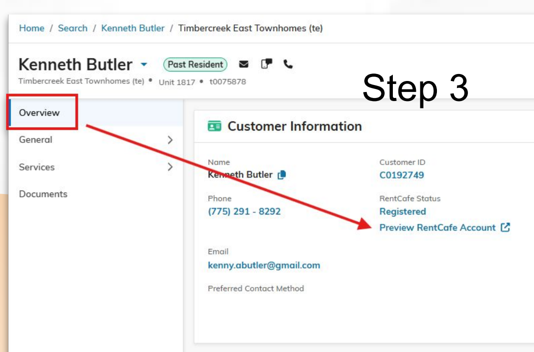
To view a roommate's **Resident Portal**, you will click on the Roomate under the Resident Status Box.



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

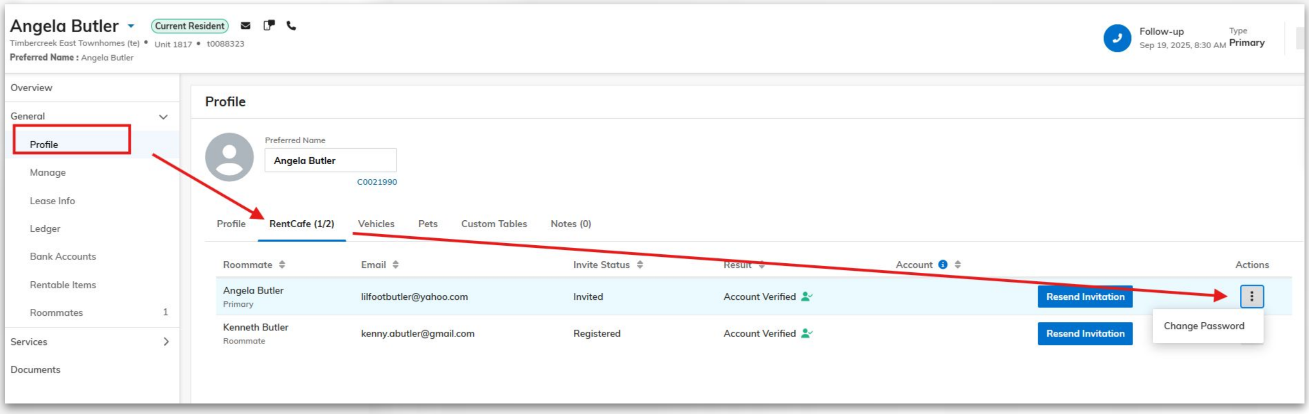




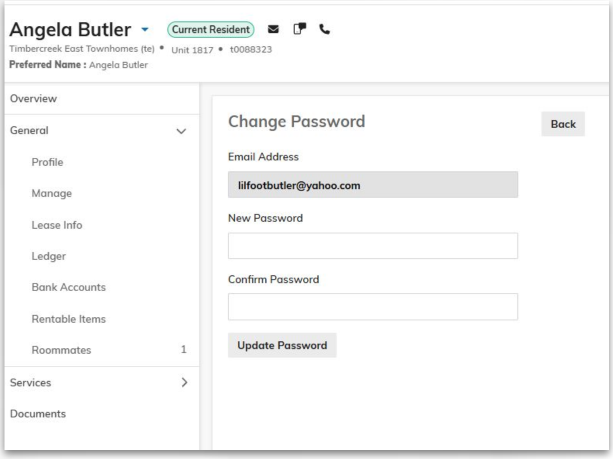


Reset Resident Portal Password

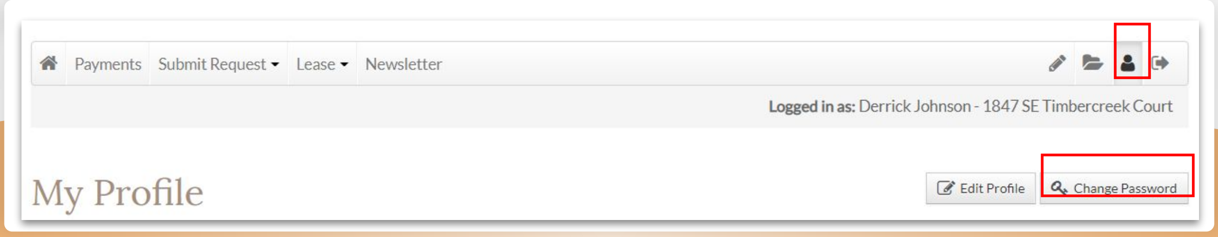
If a resident cannot access their Online Resident Portal, we have the option to reset their password on their behalf. From the Resident **Profile** screen, click RentCafe → 3 dots or kabob → Change Password



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**.

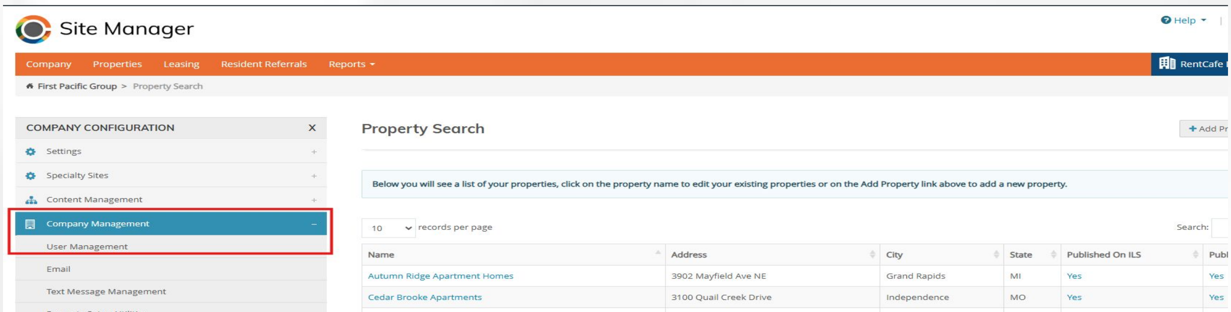


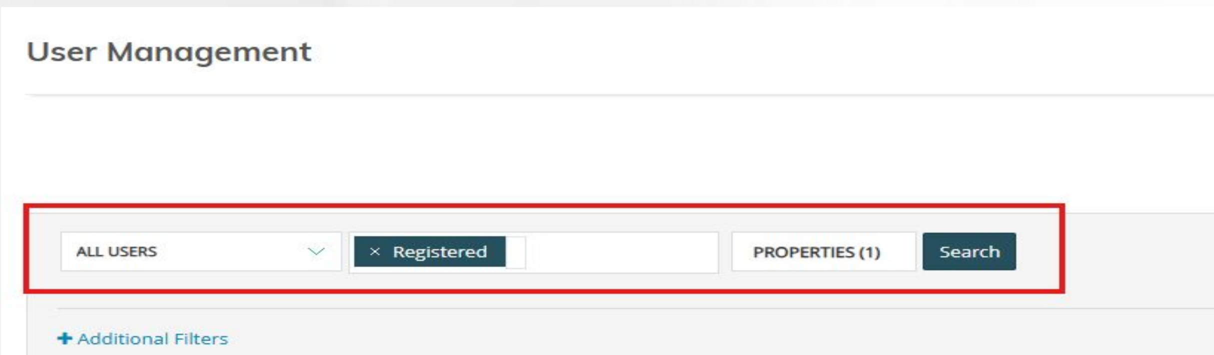
The resident should now be able to log in and they can change their password from their **Online Profile** screen.

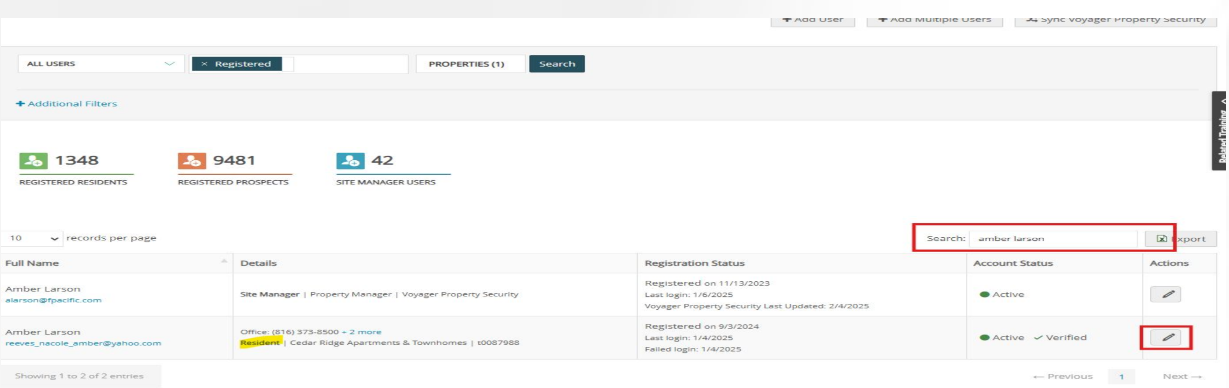


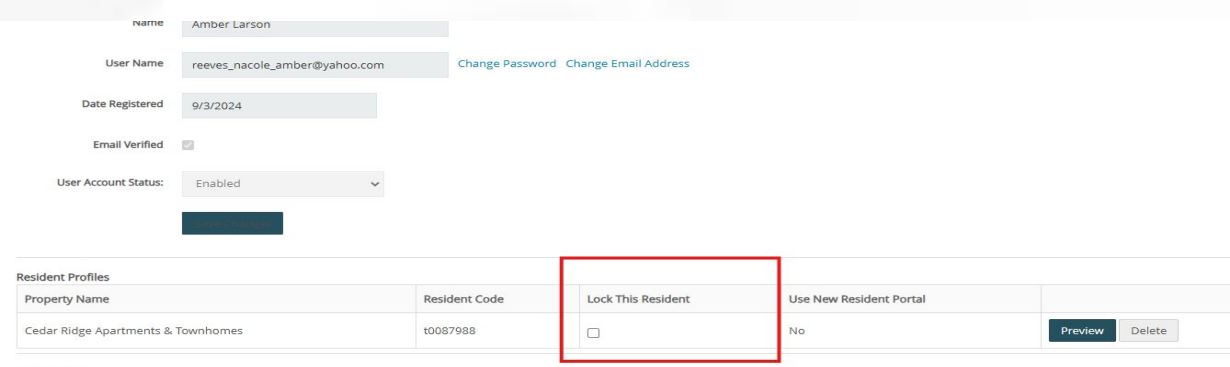
Unlock Resident Portal Password

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.









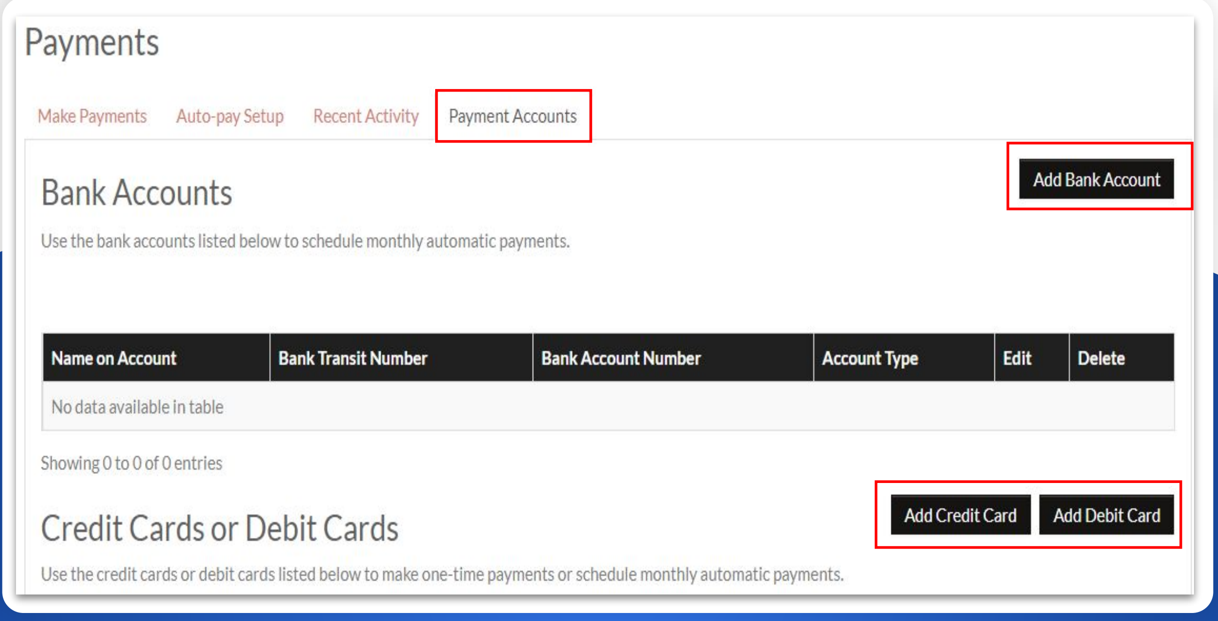
Resident Portal Payment accounts

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

- Bank Account – Checking or Savings
- Credit / Debit Card
- WIPS – Walk In Payment System
- Flex (splits payments in 2)

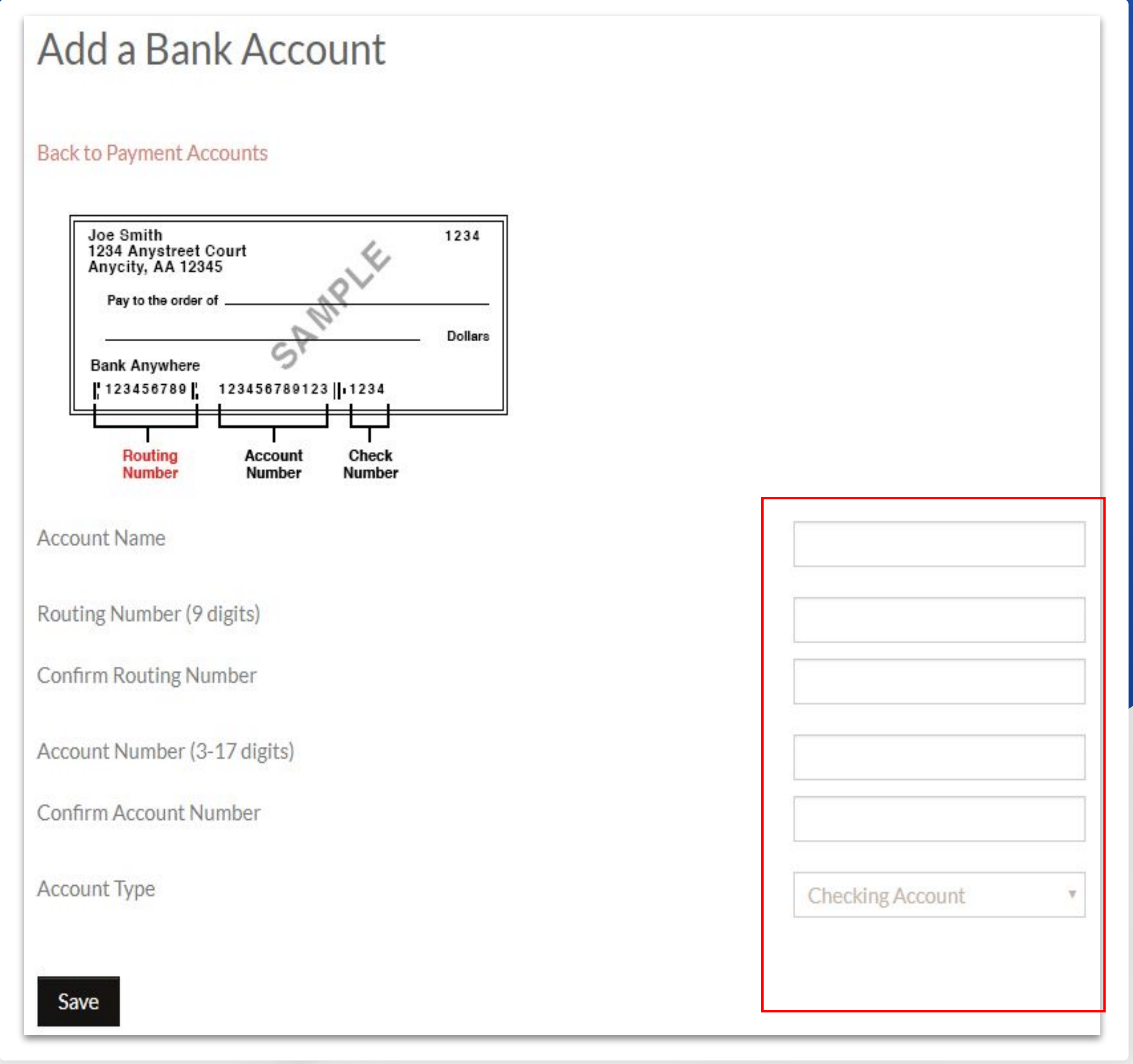
Residents will need to set up their Payment Accounts from their Resident Portal if they wish to use their Bank Account, Debit Card or Credit Card.

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.



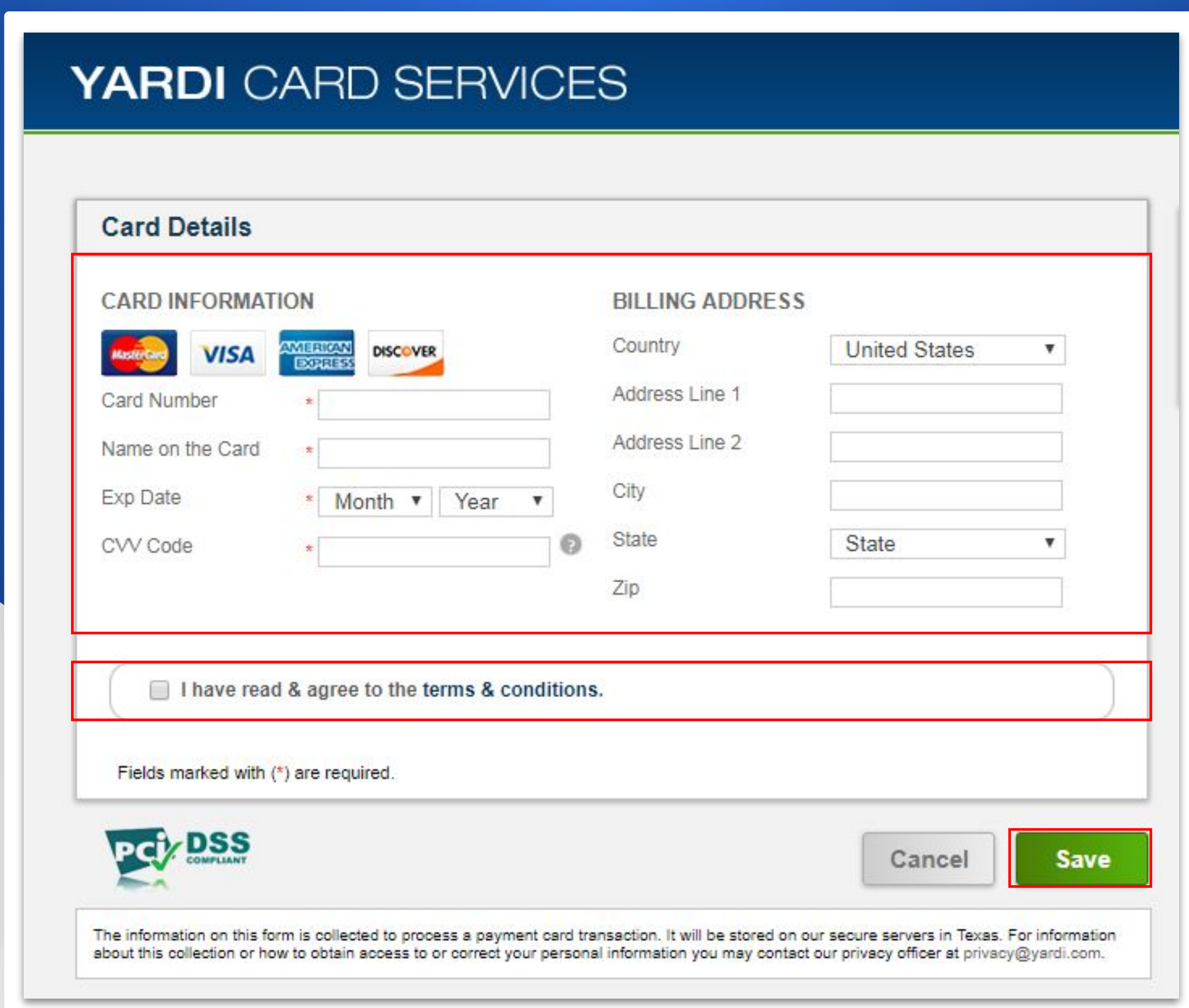
Payment Accounts
Bank Account

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.



Payment Accounts
Credit or Debit Card

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


YARDI CARD SERVICES

Card Details

CARD INFORMATION

Card Number *

Name on the Card *

Exp Date * Month Year

CVV Code *

BILLING ADDRESS

Country United States

Address Line 1

Address Line 2

City

State State

Zip

I have read & agree to the terms & conditions.

Fields marked with (*) are required.

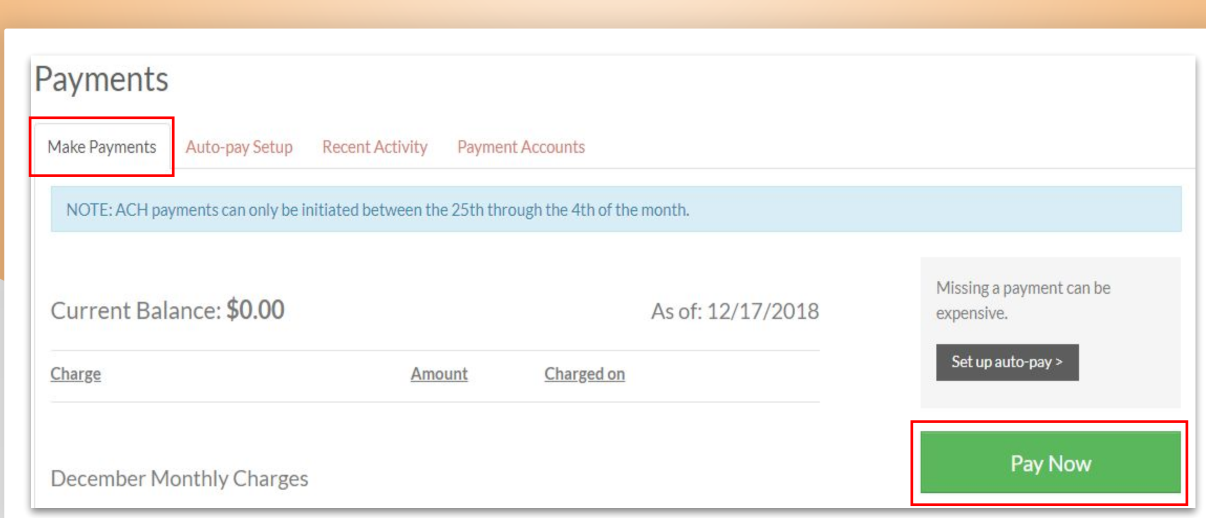
Cancel Save

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

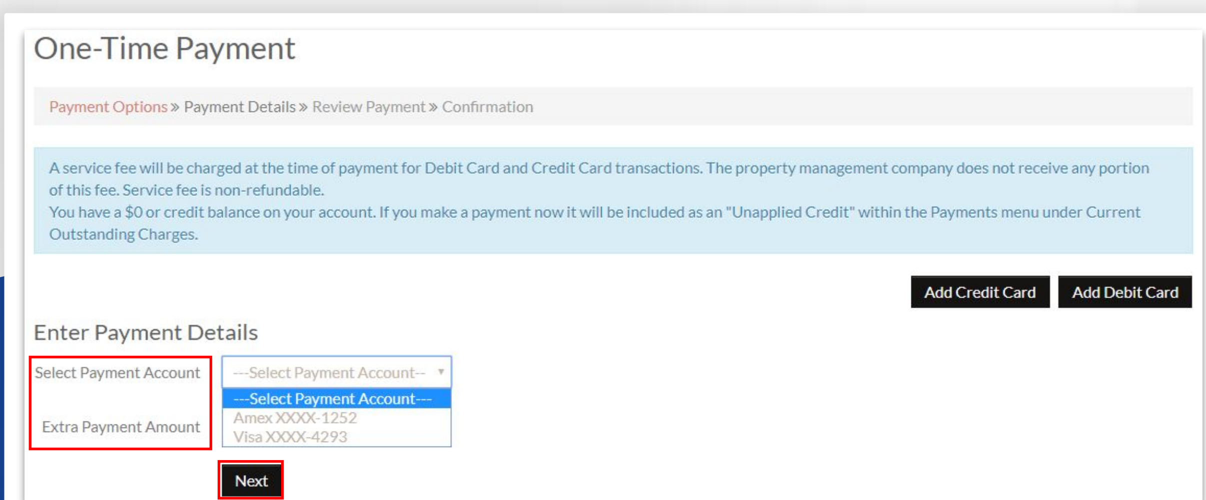
One-Time Online Payments

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

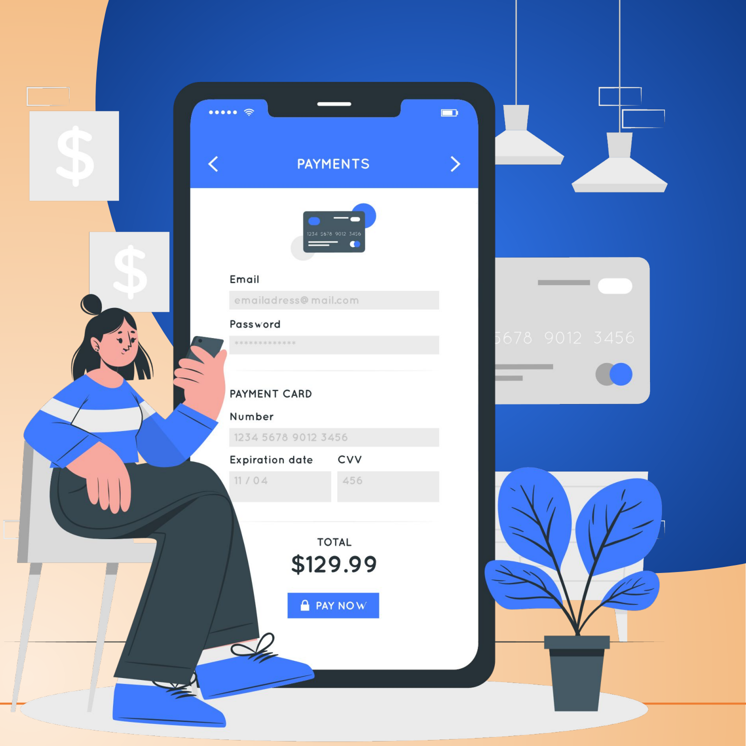
To make a **One-time Payment**, click the **Pay Now** button under the **Make Payments** tab.



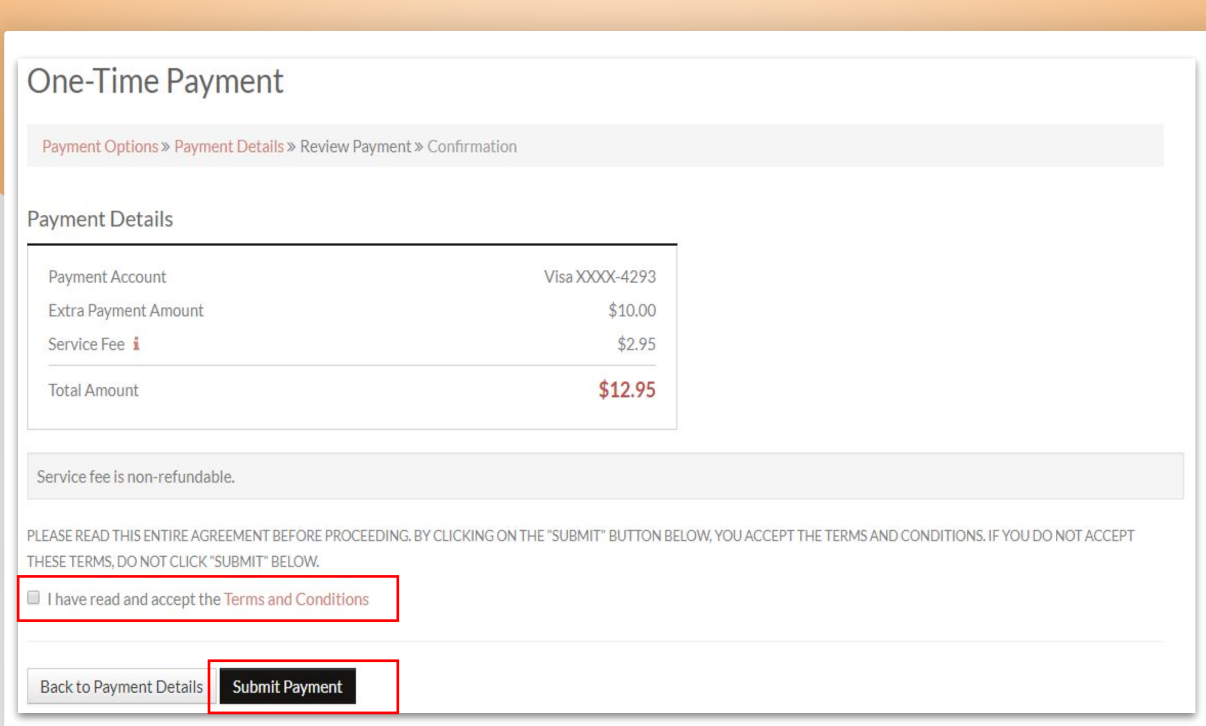
Select the payment account under the drop down **Select Payment Account** and enter the **Payment Amount**. Click **Next**.



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 i	$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

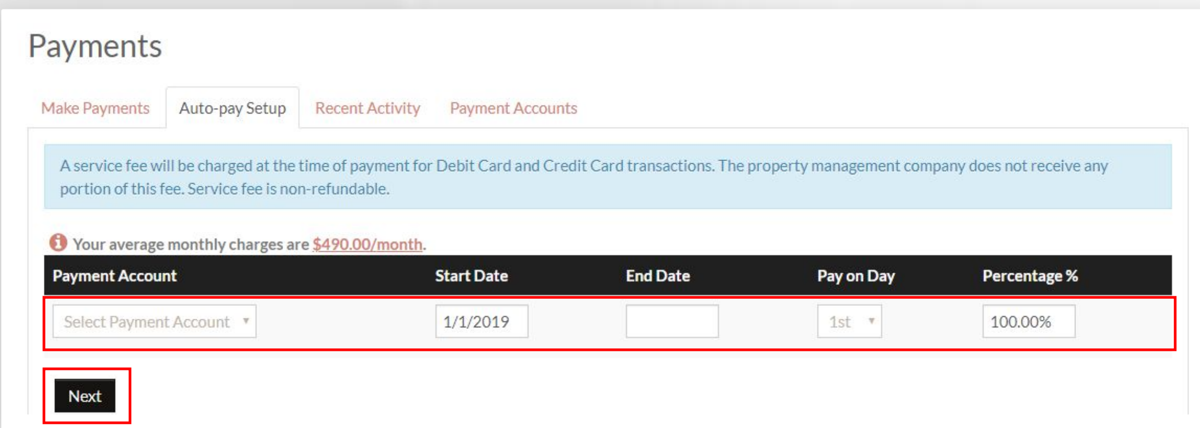
The resident will be taken to the **Confirmation** page once their payment has been successful.

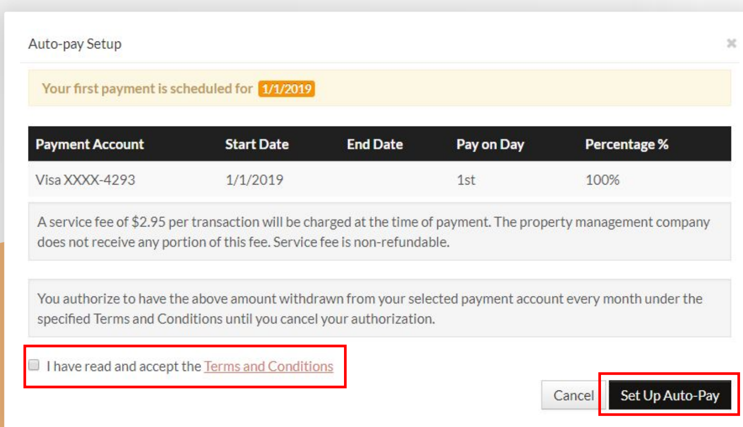
Auto-Pay Online Payments

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**.





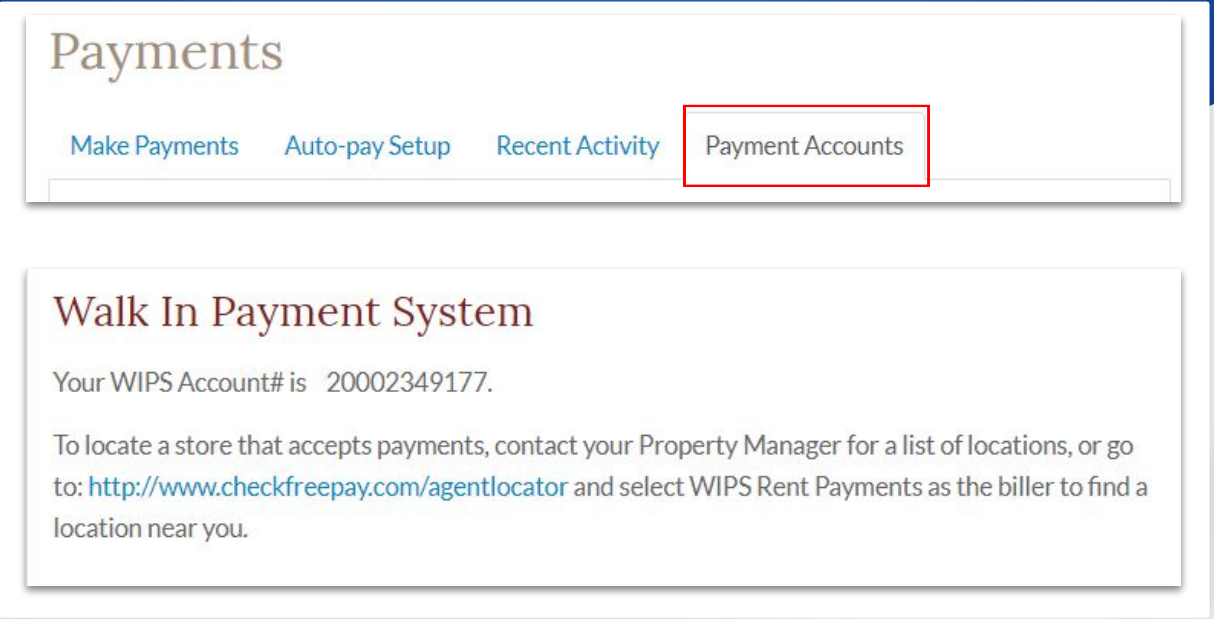
This will bring up the **Auto-pay Set Up** a confirmation. Check the **Terms and Conditions** box and then click the **Set Up Auto-Pay** button.

WIPS | PayNearme

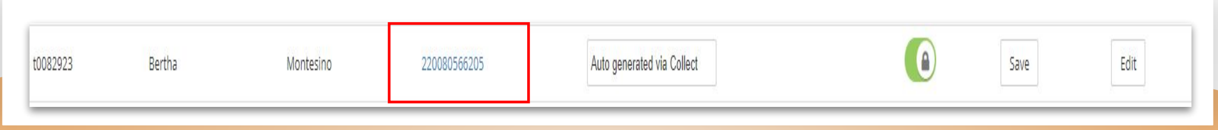
WIPS or Walk In Payment System is available for all residents to use but is more likely going to be used for residents who do not have a bank account or Credit or Debit card or residents who prefer to pay their rent in Cash.

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.

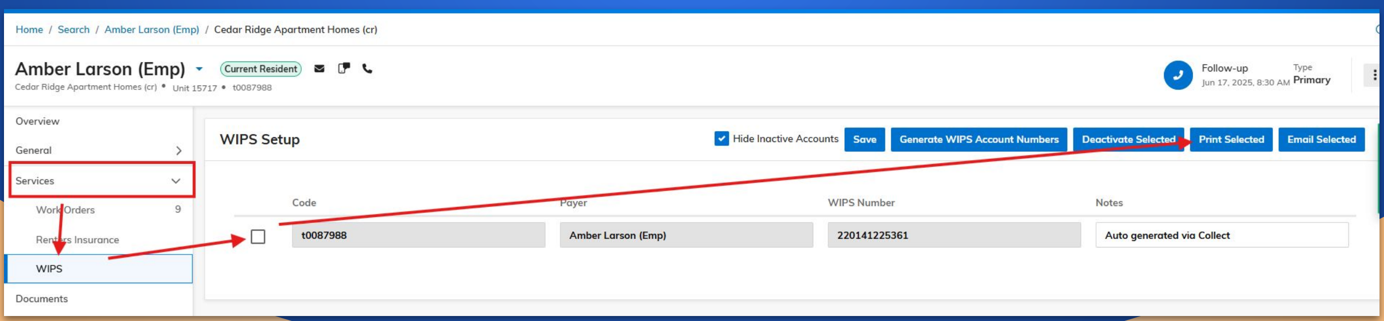


You can also advise the resident of their WIPS Account number by clicking on the WIPS Setup button within their CRM account. Click their WIPS number and a new screen will populate.

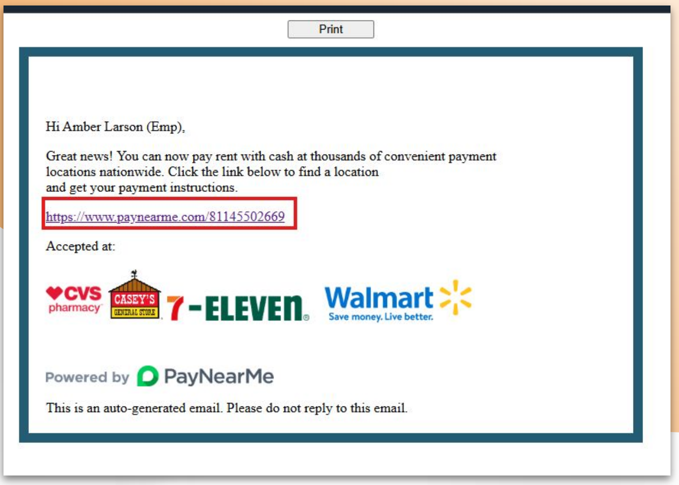


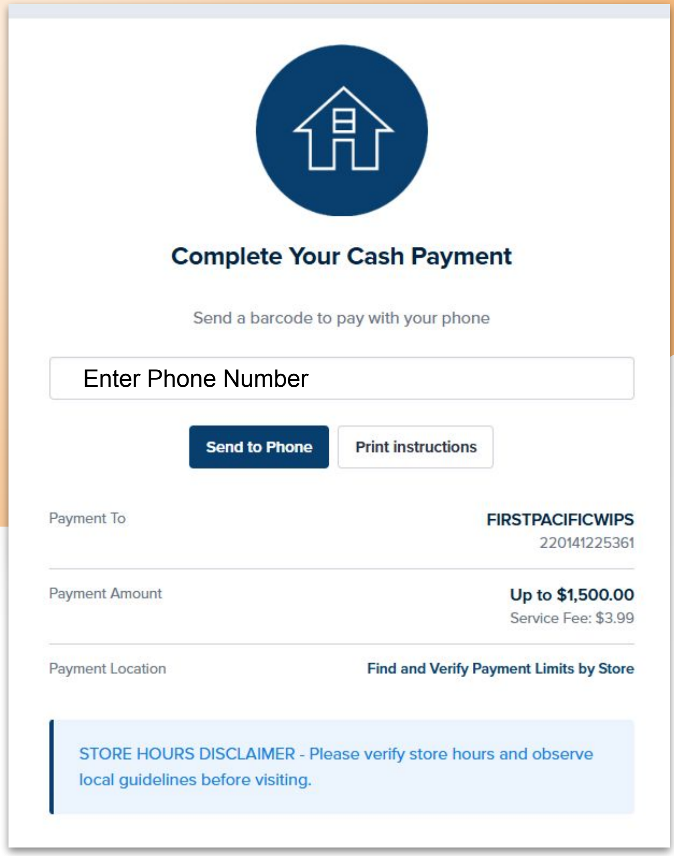
WIPS | PayNearme

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

CVS

PayNearMe

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

PayNearMe

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

PayNearMe

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

Walmart

PayNearMe

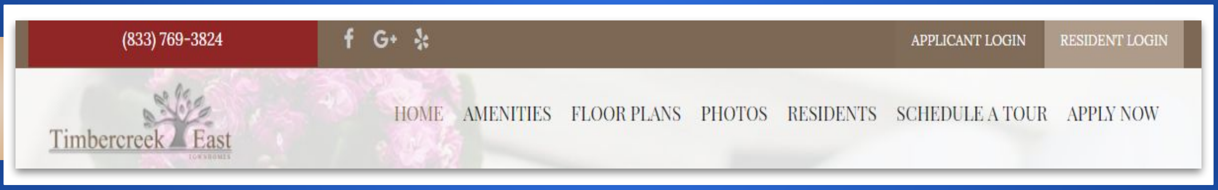
1. Press Cash In on the Financial Services Tab
2. Scan Barcode
3. Enter amount and follow register prompts
4. Give customer receipt and PaySlip

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

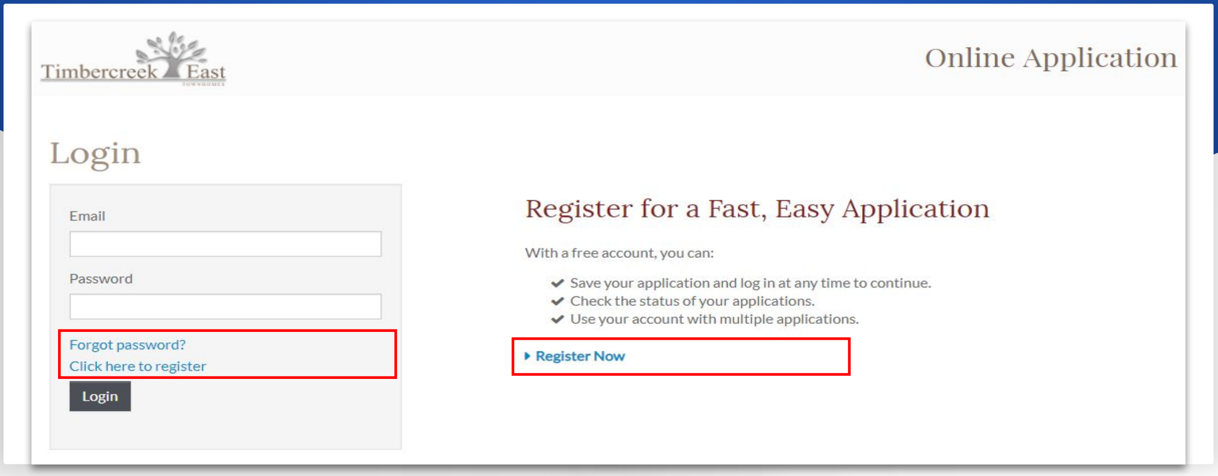
Online Application

All applications should be completed online via our Property Website.

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

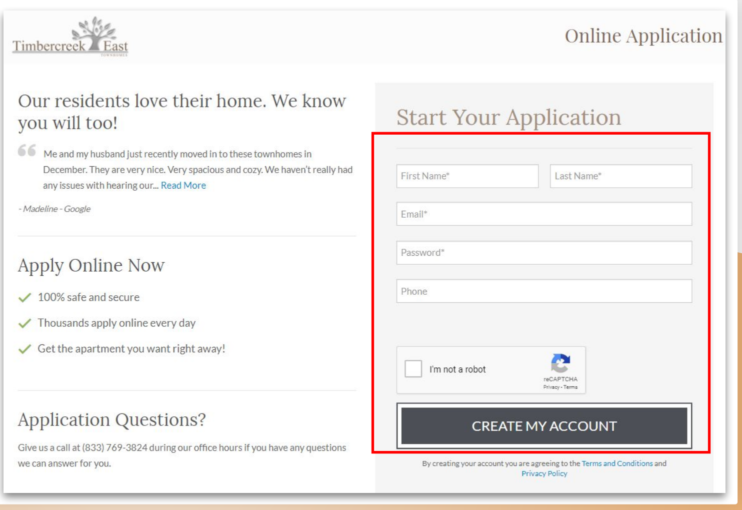


This will open up a new window where they can Log In or Register.

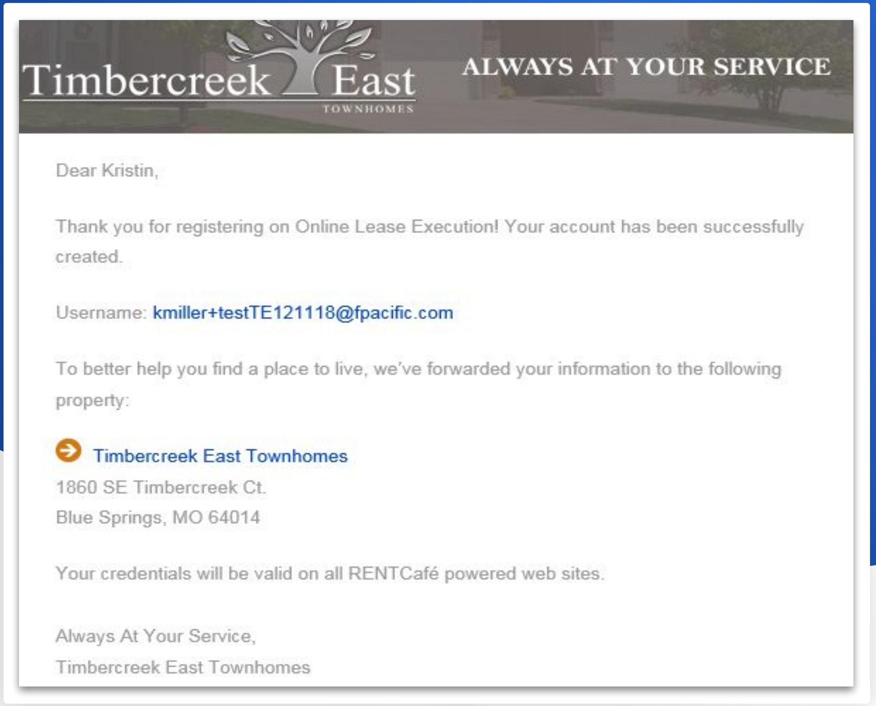


If a prospect already has a guest card created, you should have clicked the **Invite to RentCafe** button in CRM to send them the registration email. If they do not have a registration email, they will click the **Register Now** button or the **Click here to register** as they both take you to the same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

All the prospect needs to register is to enter their **First Name**, **Last Name**, **Email Address**, a **Password**, and **Phone Number**. They will check the **I'm not a robot** box and click **CREATE MY ACCOUNT**.



Online Application


Timbercreek East TOWNHOMES

ALWAYS AT YOUR SERVICE

Dear Kristin,

Thank you for registering on Online Lease Execution! Your account has been successfully created.

Username: kmiller+testTE121118@fpacific.com

To better help you find a place to live, we've forwarded your information to the following property:

Timbercreek East Townhomes
1860 SE Timbercreek Ct.
Blue Springs, MO 64014

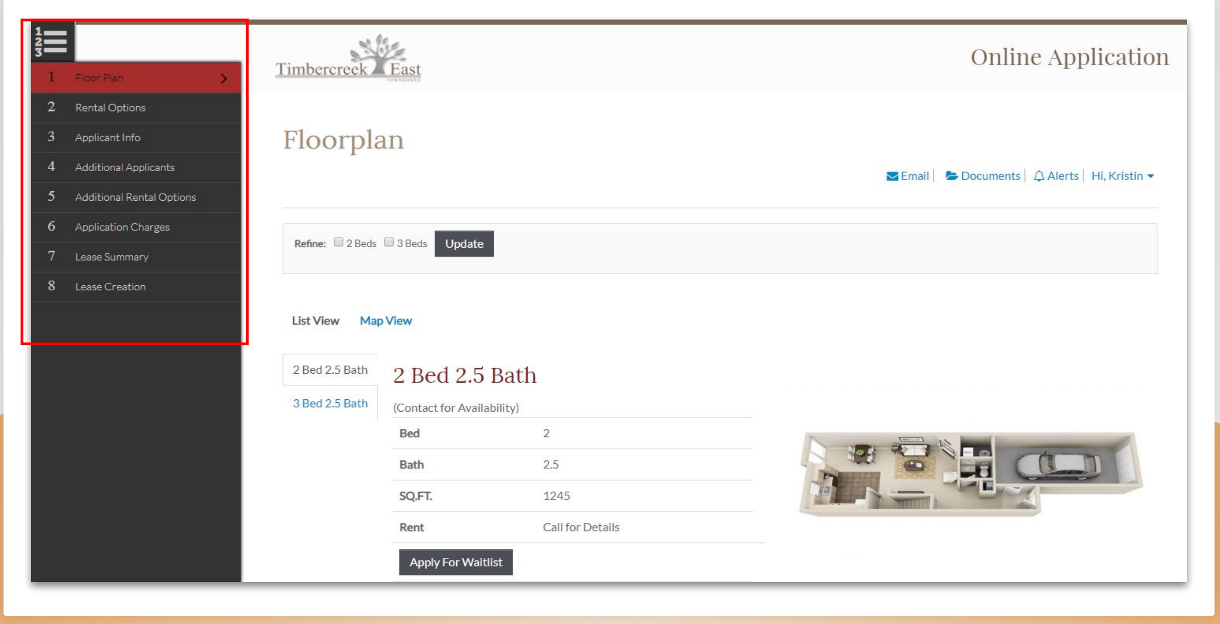
Your credentials will be valid on all RENTCafé powered web sites.

Always At Your Service,
Timbercreek East Townhomes

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

Confirmation autoresponder email with their Username listed.

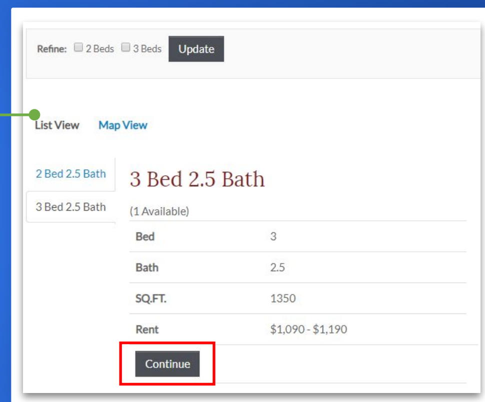
The Prospect will be logged into the **Online Application** portal. The Left-side shows the steps needed in order to complete the application process.



Online Application

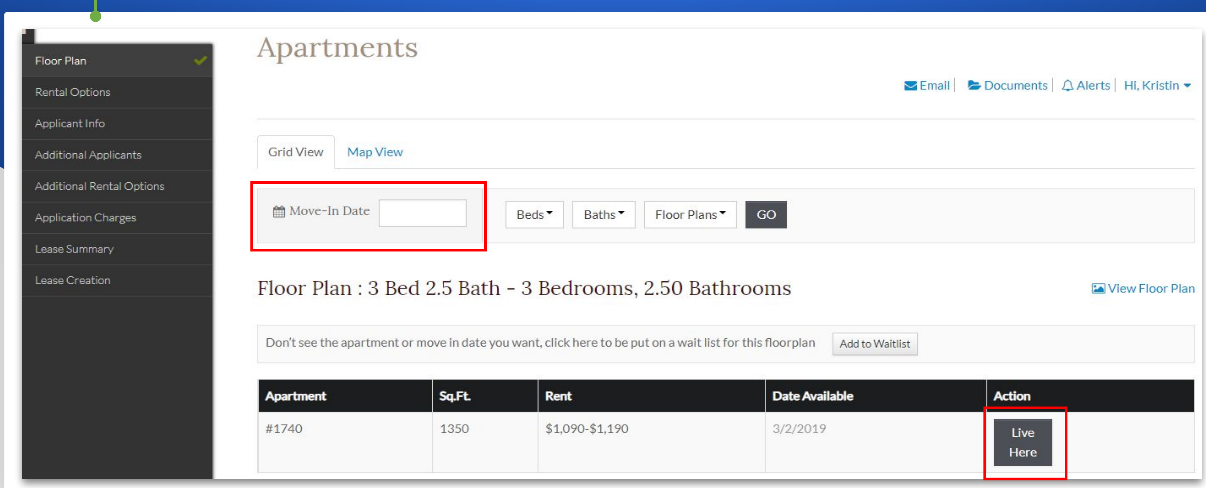
Floor Plan- Prospect needs to select a floor plan or Apply for the Waitlist. Click Continue.

01

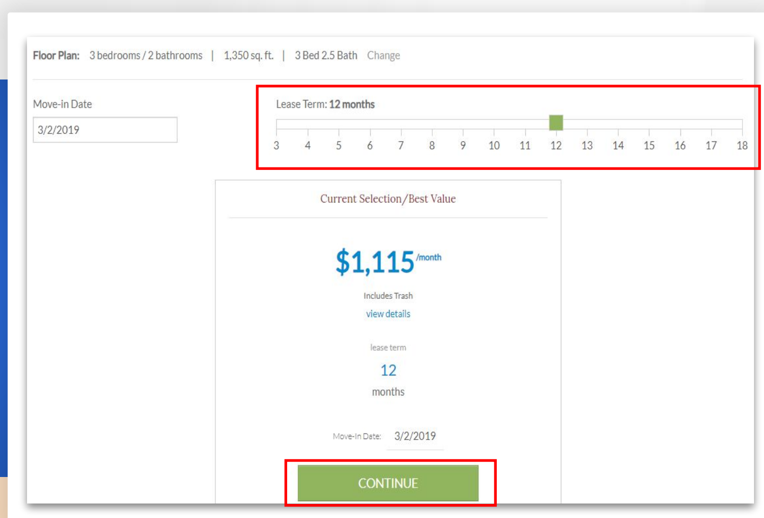


02

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



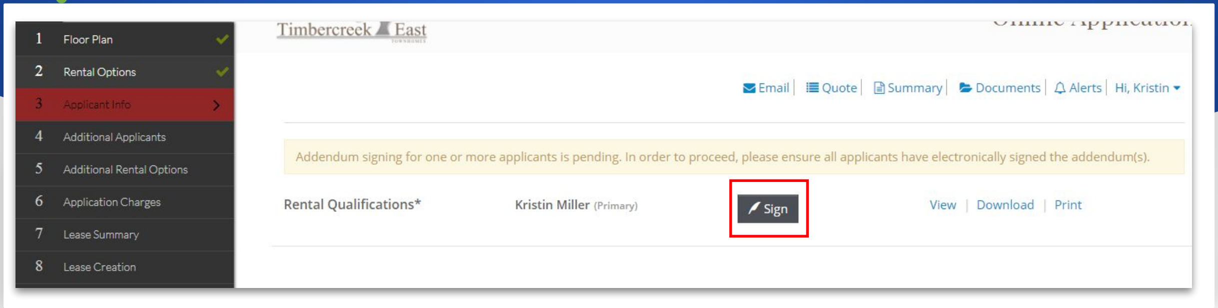
They will then select their **Lease Term** and click **Continue.**



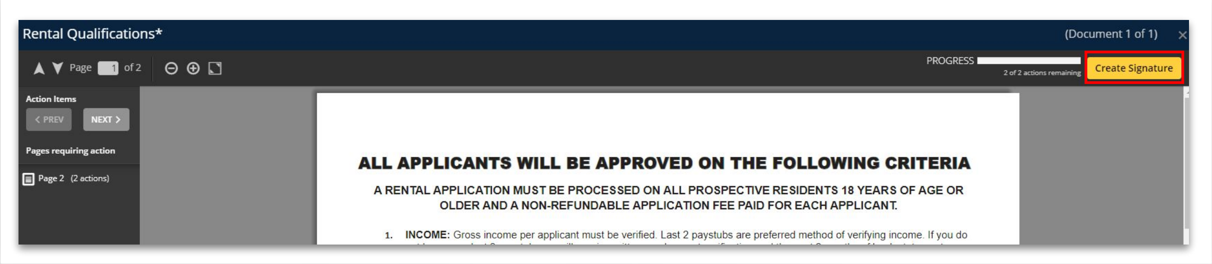
Online Application

03

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



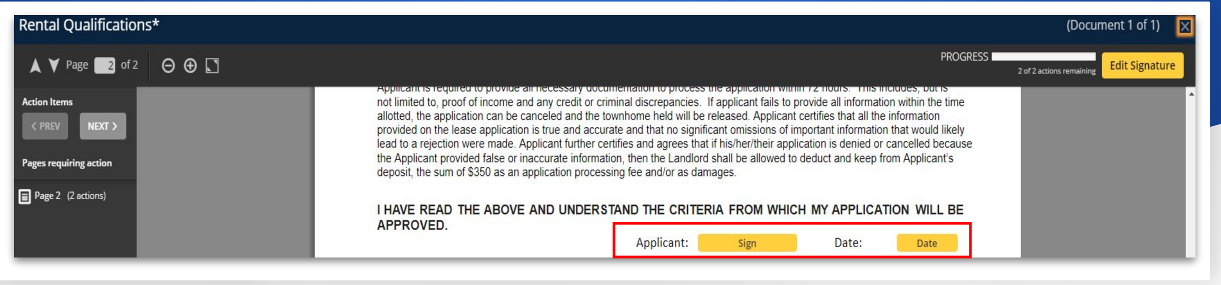
This will bring up the **Online Rental Qualifications Document**. The Prospect will need to click on the **Create Signature** button to create a signature to sign the document.



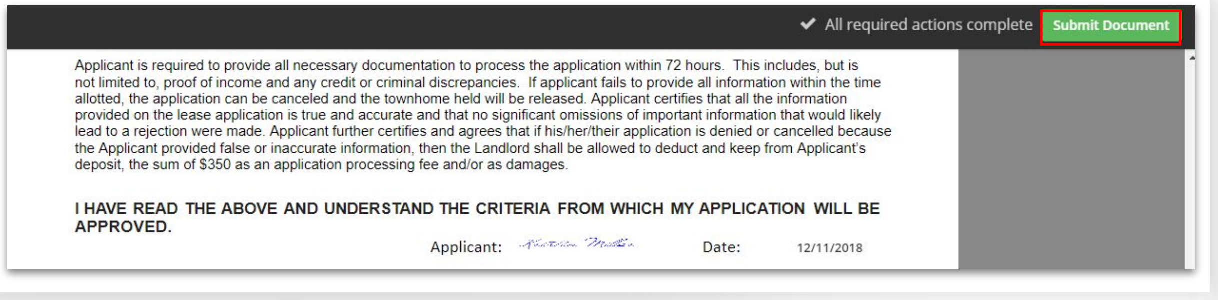
This will bring up a window where they can select from a list of pre-generated signatures. They need to select a Signature, Accept the Terms and hit the Save Signature button.

Online Application

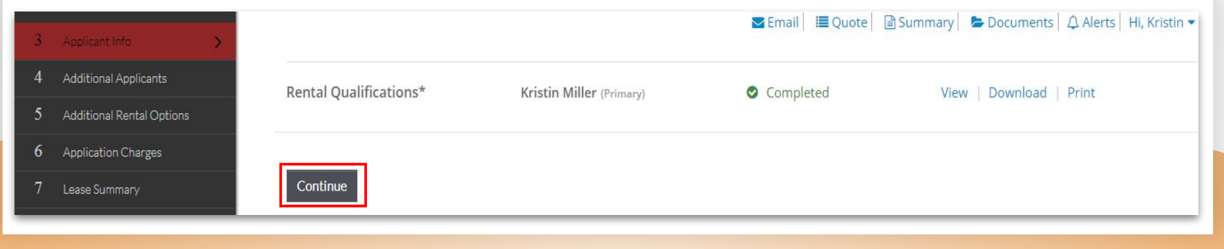
Once the signature is saved, they can click the **Sign** button and **Date** button to sign the document.



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



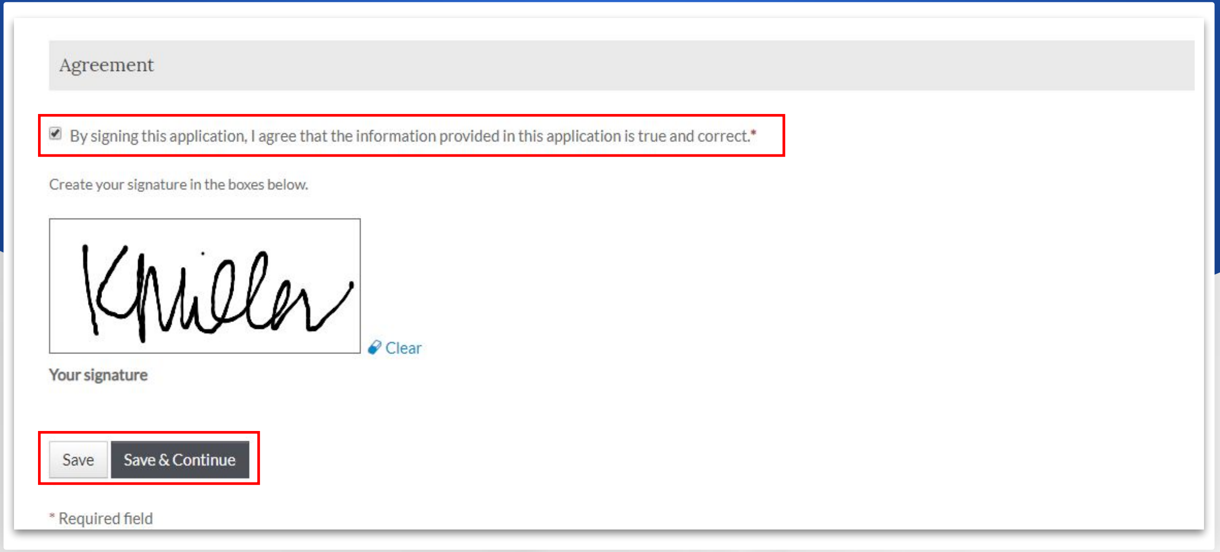
This will update the **Rental Qualifications Document** as **Complete** in the application process. Click the **Continue** button.



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

Online Application

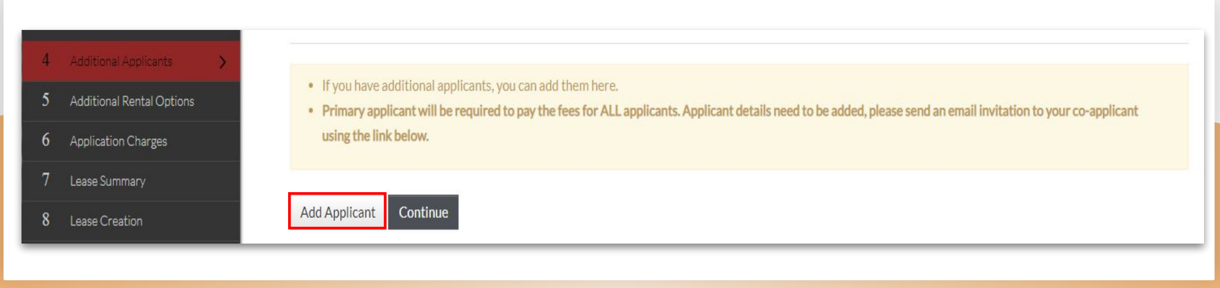
Once all applicant information is entered, the Prospect will **Agree** to the terms by checking the box next to **By signing this application, I agree that the information provided in this application is true and correct**. They will create a signature using their mouse or if on a tablet, their finger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



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.

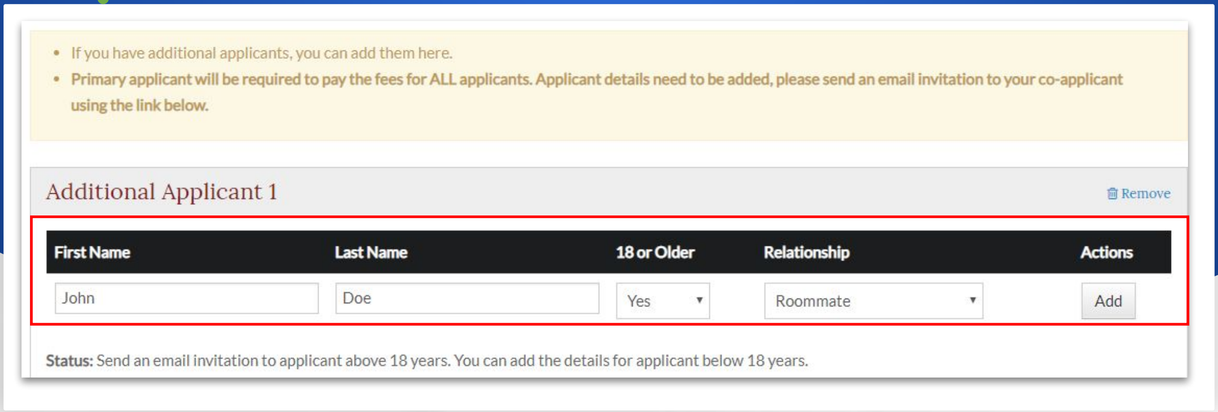
Click the **Add Applicant** button to add additional roommates. If no roomates are being added, click **Continue**.



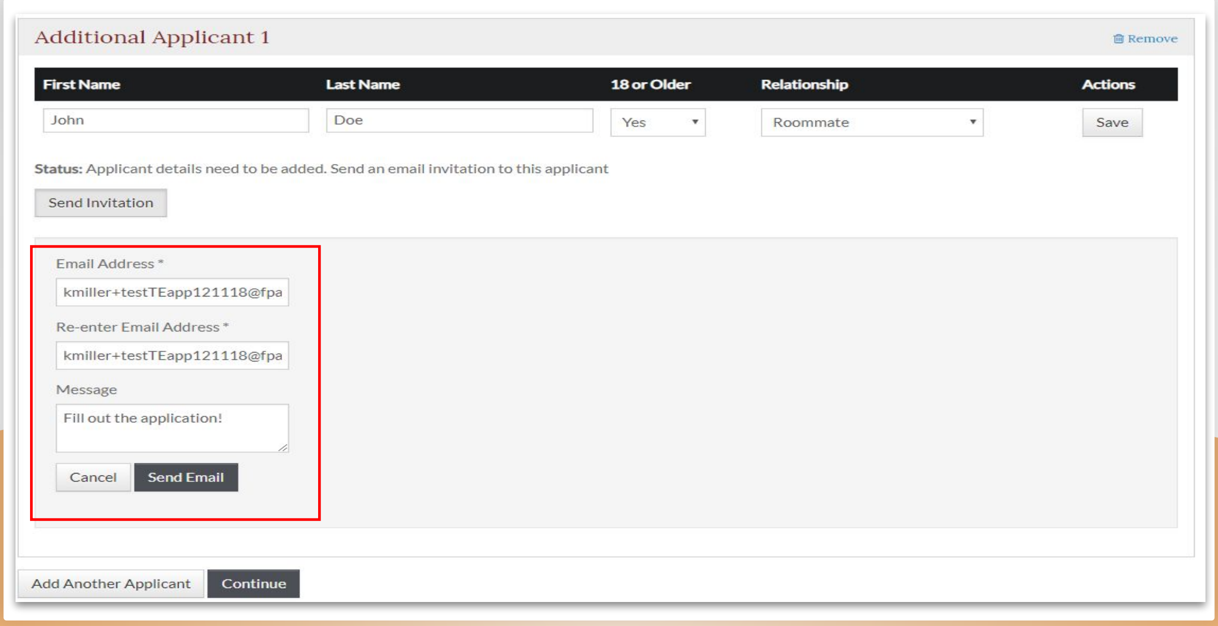
Online Application

05

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



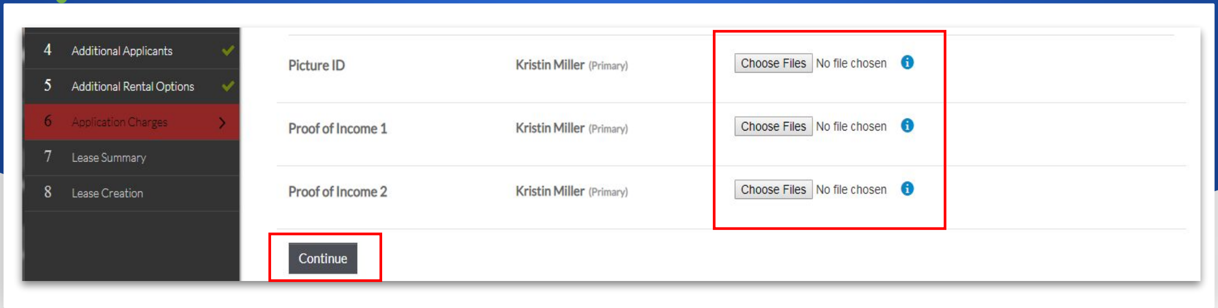
Once the **Add** button is clicked, it will save the additional applicant's information. Click the **Send Invitation** button. This will open up additional fields to enter the Additional Applicant's **Email Address**. Click **Send Email**. If more additional applicants are needed, click the **Add Another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



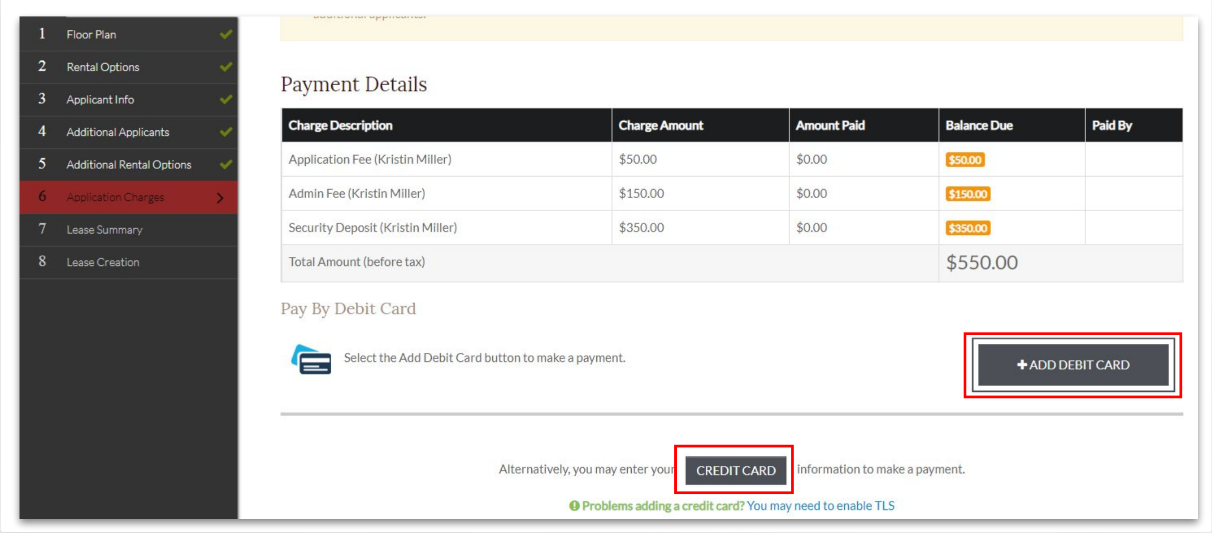
Online Application

06

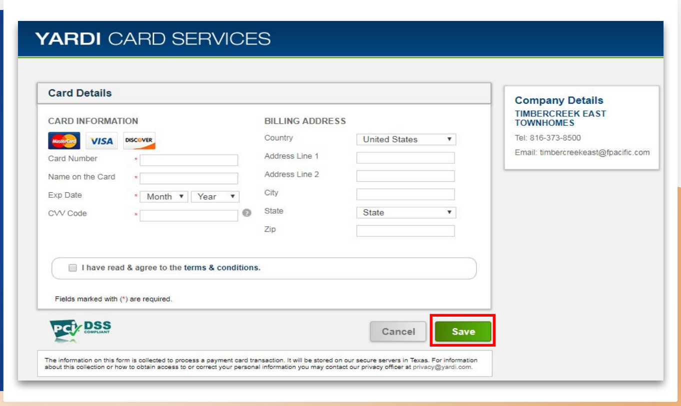
Application Charges- We require a Photo ID to continue the application process as well as two current pay stubs to be uploaded. Prospect will need to upload these documents and then click the **Continue** button.



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.

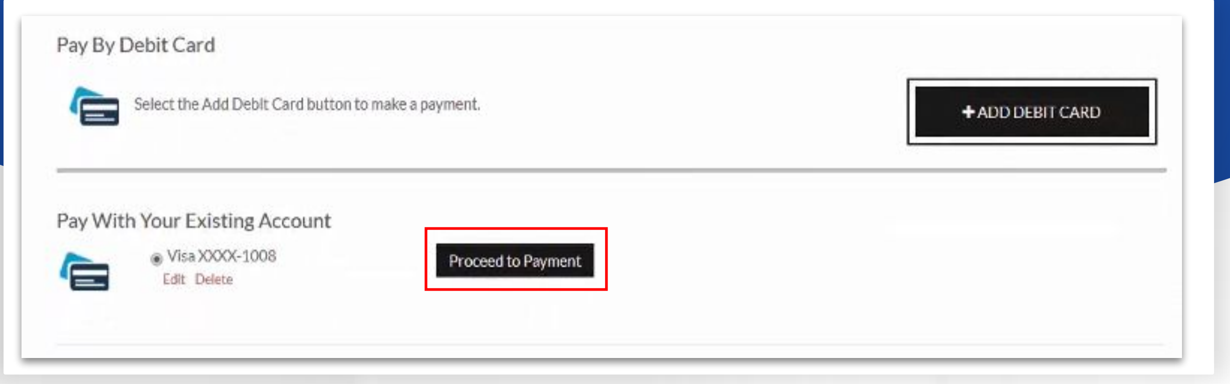


This will bring them to the **Yardi Card Services** window to enter their card information. Once all information is entered, they will need to hit **Save.**

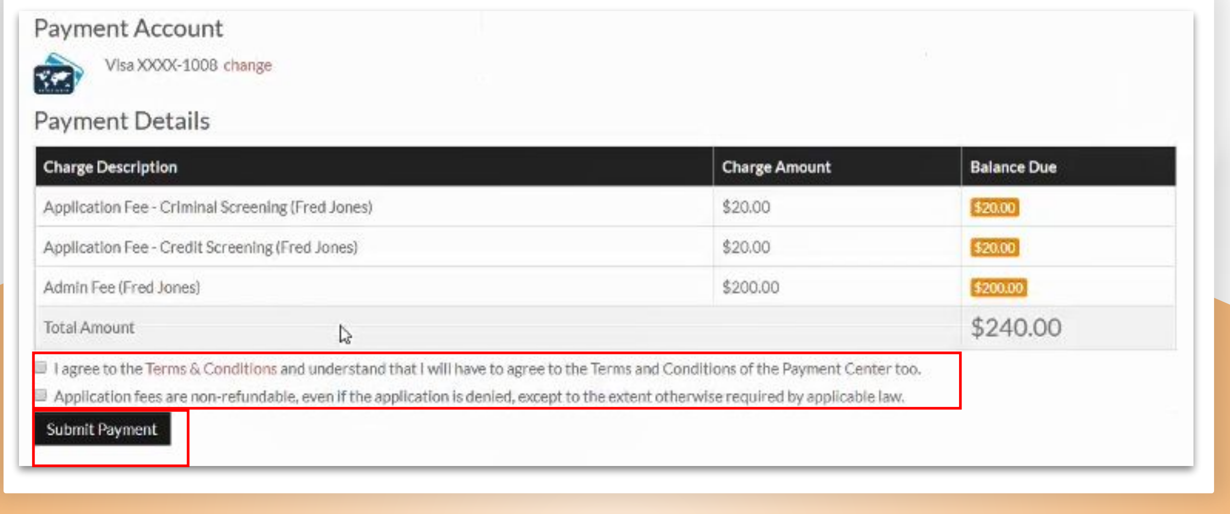


Online Application

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.



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

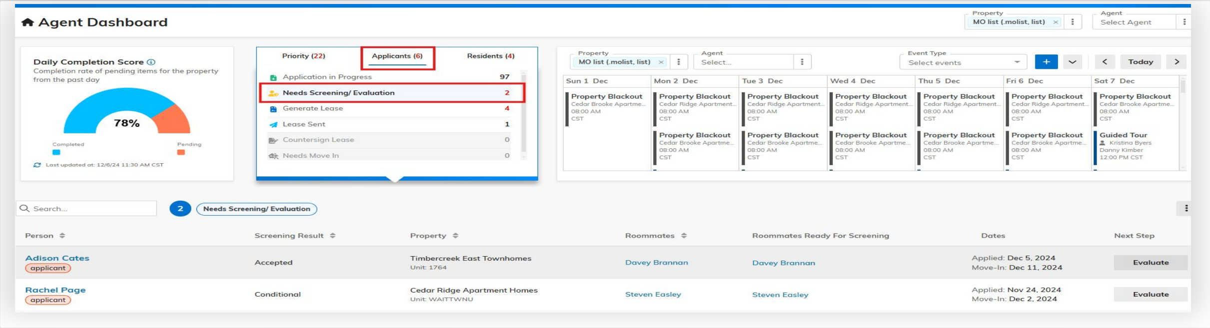
A **Payment Confirmation** screen will come up with their payment details and they will also receive a confirmation email. The Property will also receive an email notification of the application.

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.

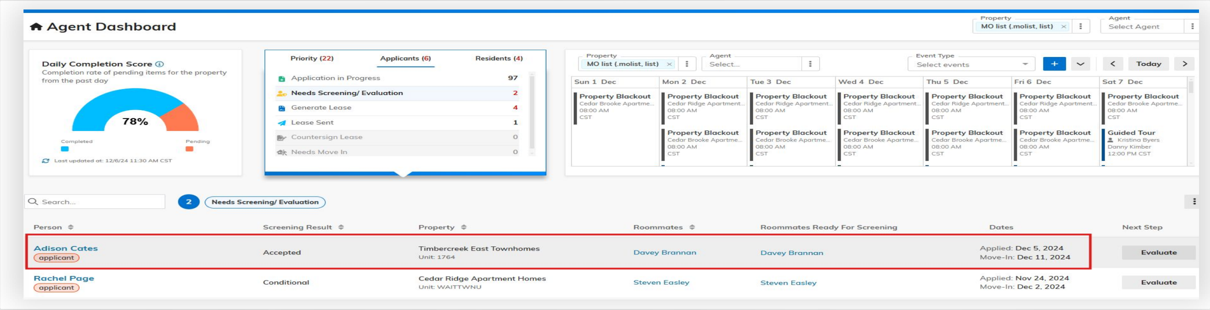
CRM IQ
Screening Process

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

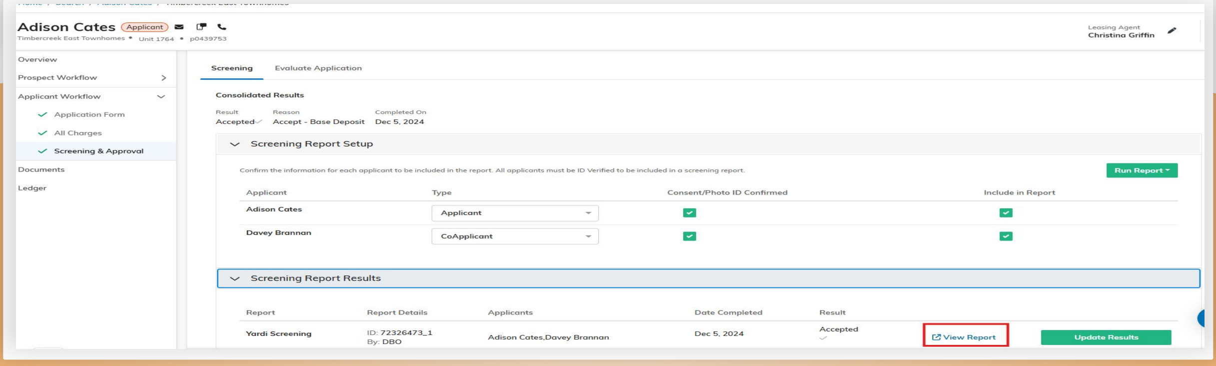
- Access the Pending Application under your Applicants Queue Box. Start at Needs Screening/Evaluation.



- 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

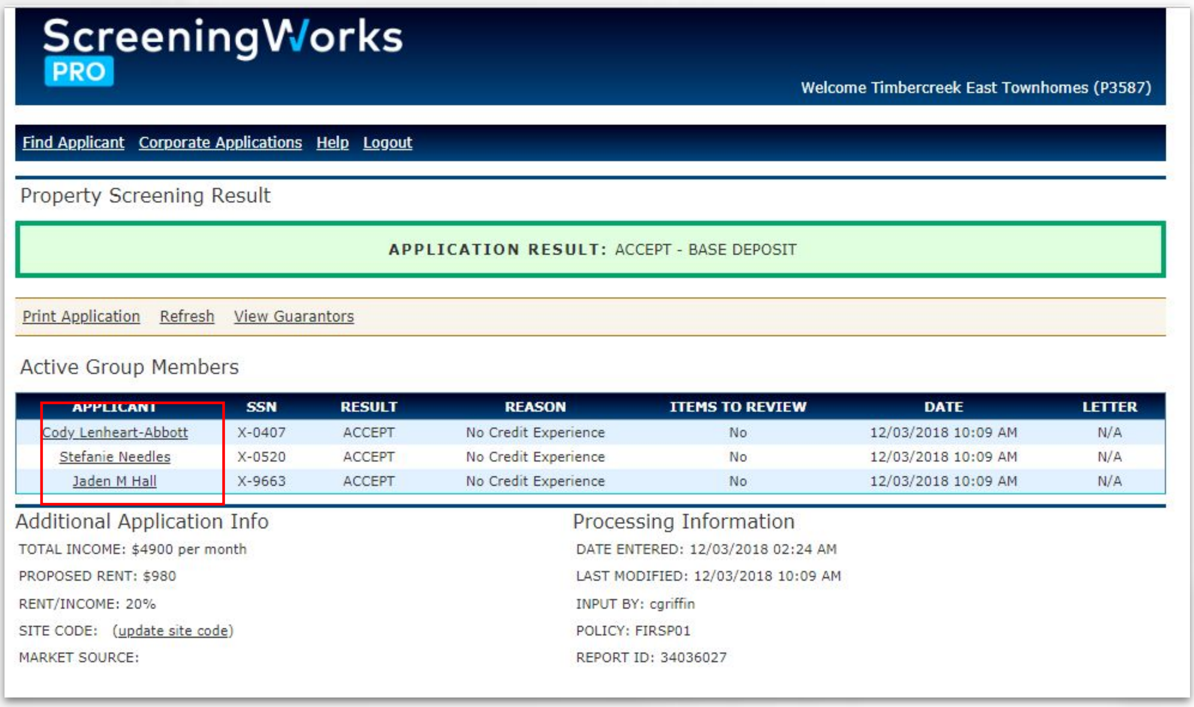


- Click on the **Applicant's Name or Evaluate** to access their Profile / Screening. Click the > icon to drop down the results and to be able to access the screening report. Click View Report to open the screening report.



CRM IQ
Screening Process

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



ScreeningWorks PRO

Welcome Timbercreek East Townhomes (P3587)

Find Applicant Corporate Applications Help Logout

Property Screening Result

APPLICATION RESULT: ACCEPT - BASE DEPOSIT

Print Application Refresh View Guarantors

Active Group Members

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

Additional Application Info

TOTAL INCOME: $4900 per month

PROPOSED RENT: $980

RENT/INCOME: 20%

SITE CODE: (update site code)

MARKET SOURCE:

Processing Information

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

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

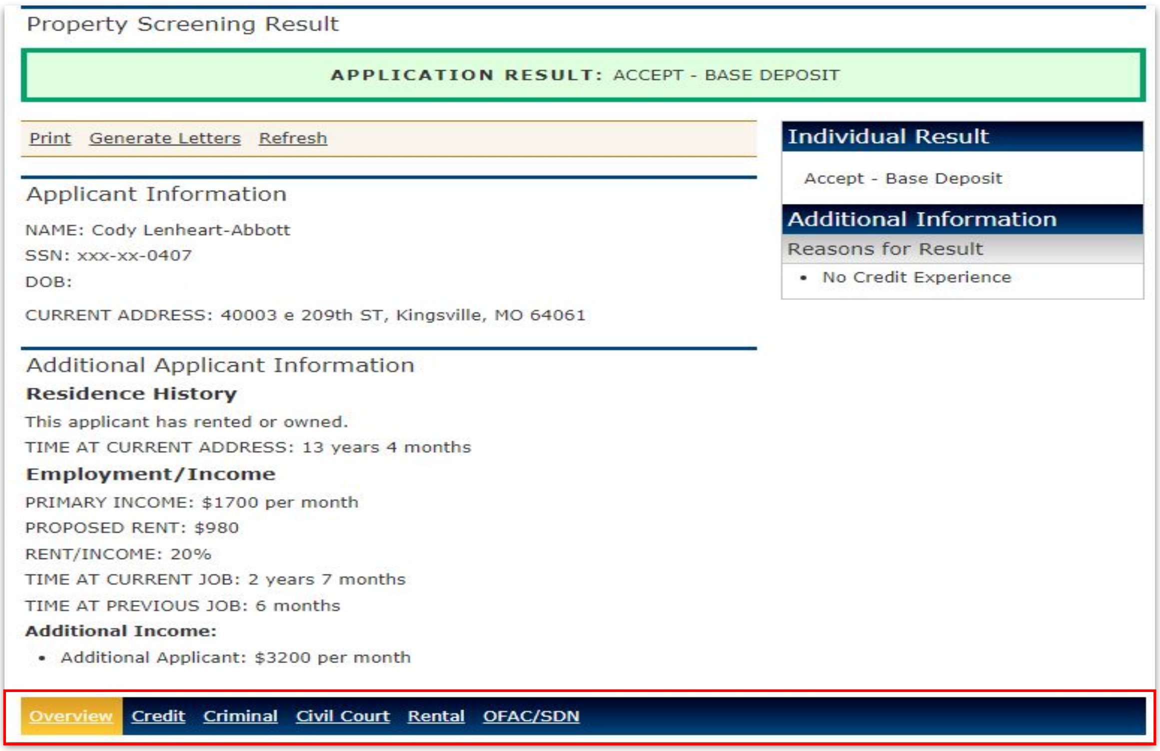
INPUT BY: cgriffin

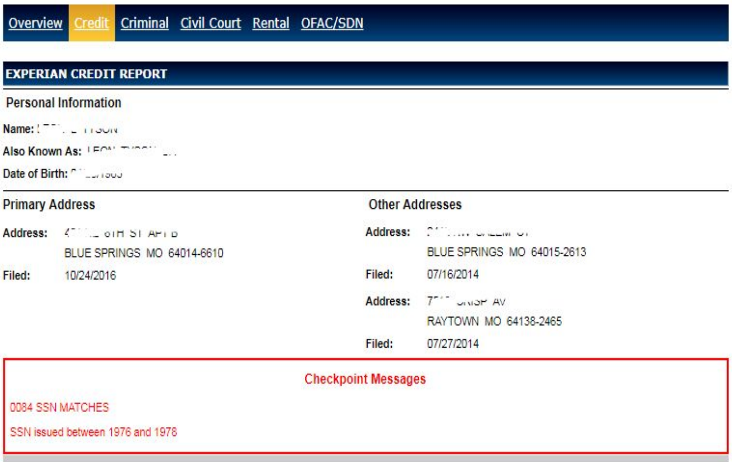
POLICY: FIRSP01

REPORT ID: 34036027

CRM IQ
Screening Process

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





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

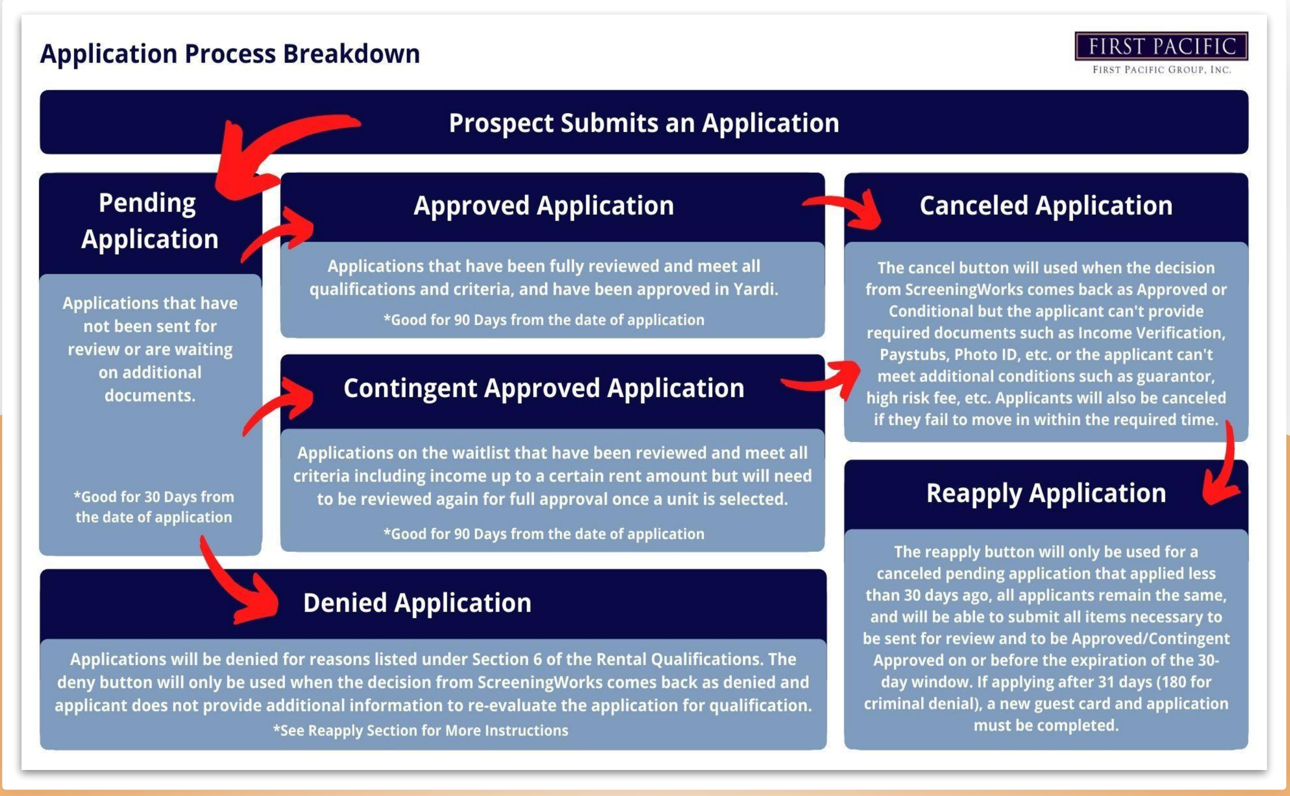
a. The Cancel button in Yardi will be used for the following reasons:
   i. Decision from ScreeningWorks comes back as Accepted but the applicant cannot provide the required documents such as Income verification, paystubs, photo ID, Social Security Card, etc. to be submitted for review and approved within 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 <u>ONLY</u> 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 – <u>DO NOT</u> 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 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:

CRM IQ

Submitting Application for review

Saving Documents Applicants and Residents

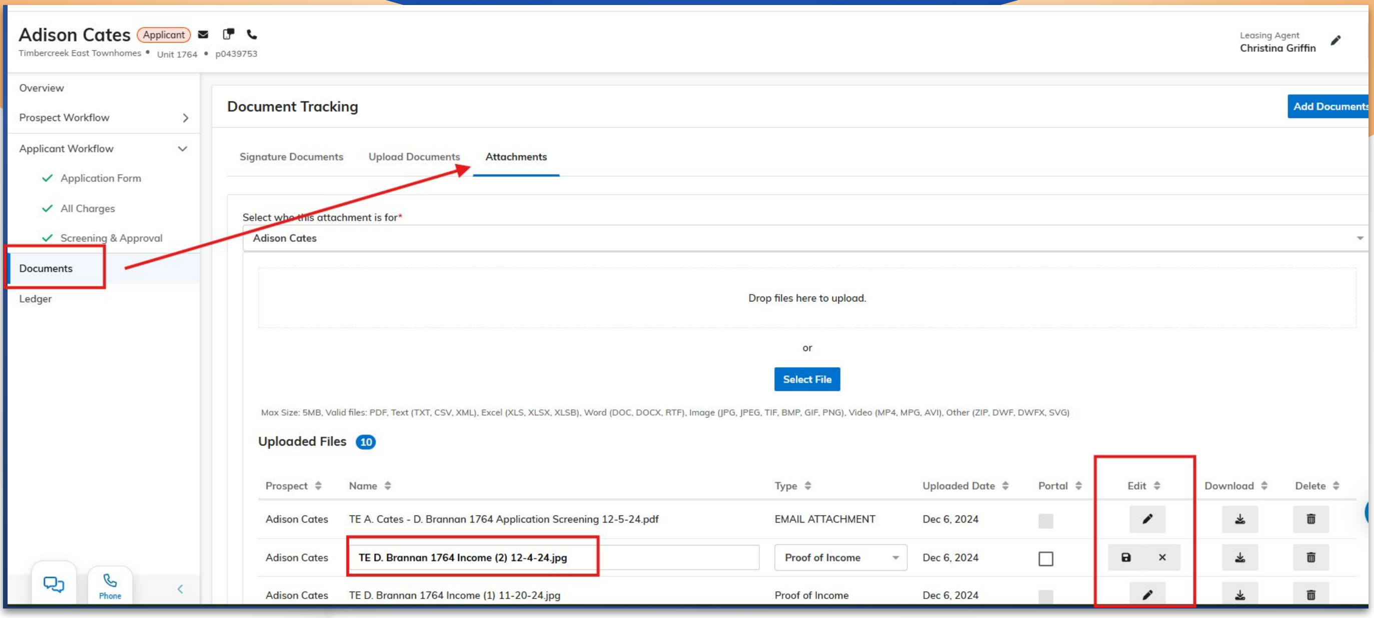
All Documents need to be saved as: Property Code – First initial of First name – Last name – Apt # - Document Type – Date

(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



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

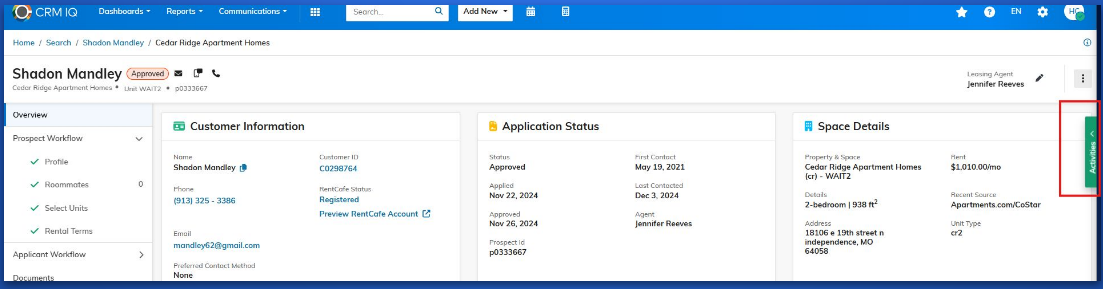
After Ruanne has approved your application, she will automatically charge the applicant the standard earnest deposit. This earnest deposit is **non-refundable.**

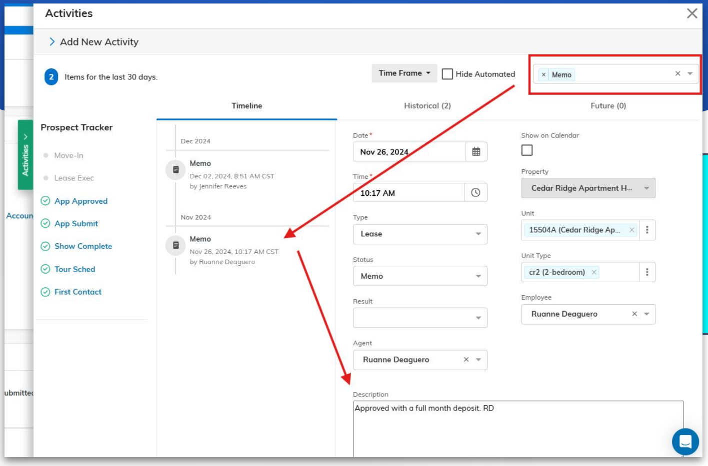
She will send you an email with all approve notes and you'll get an additional email informing you if the earnest deposit has successfully processed through.

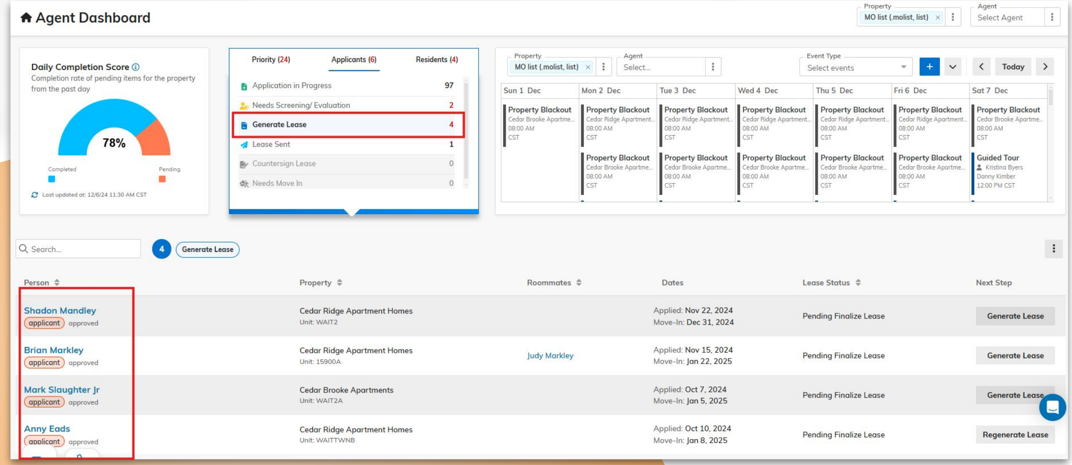
If the earnest deposit fails, the applicant has 24hrs to login and pay or they will be moved to the waitlist and that home is now back on the market.

Ruanne will also put her approve notes in the applicants Memos

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



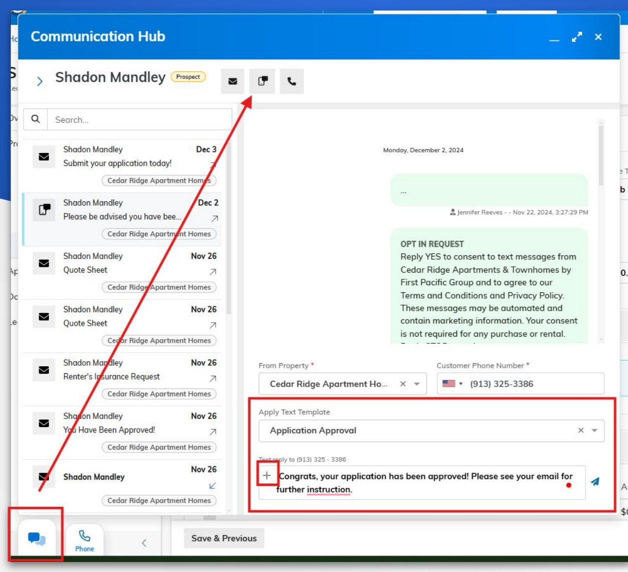




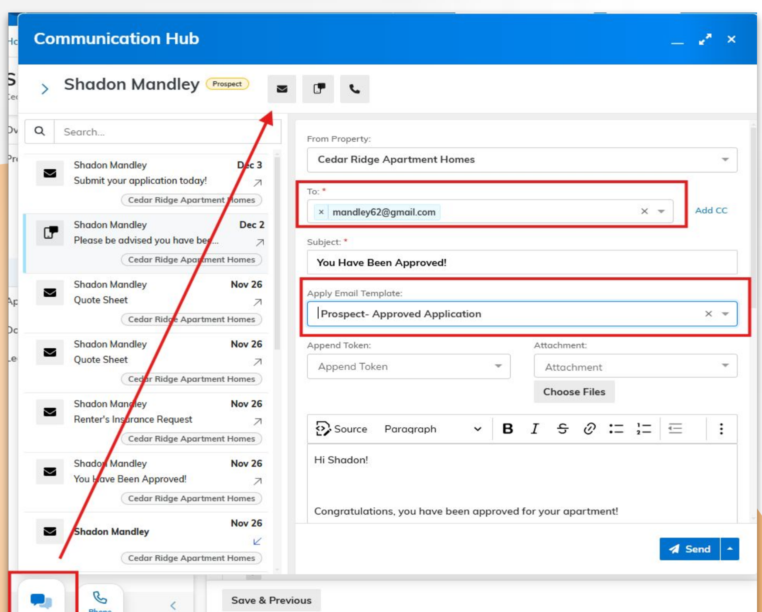
Approval of Application

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.



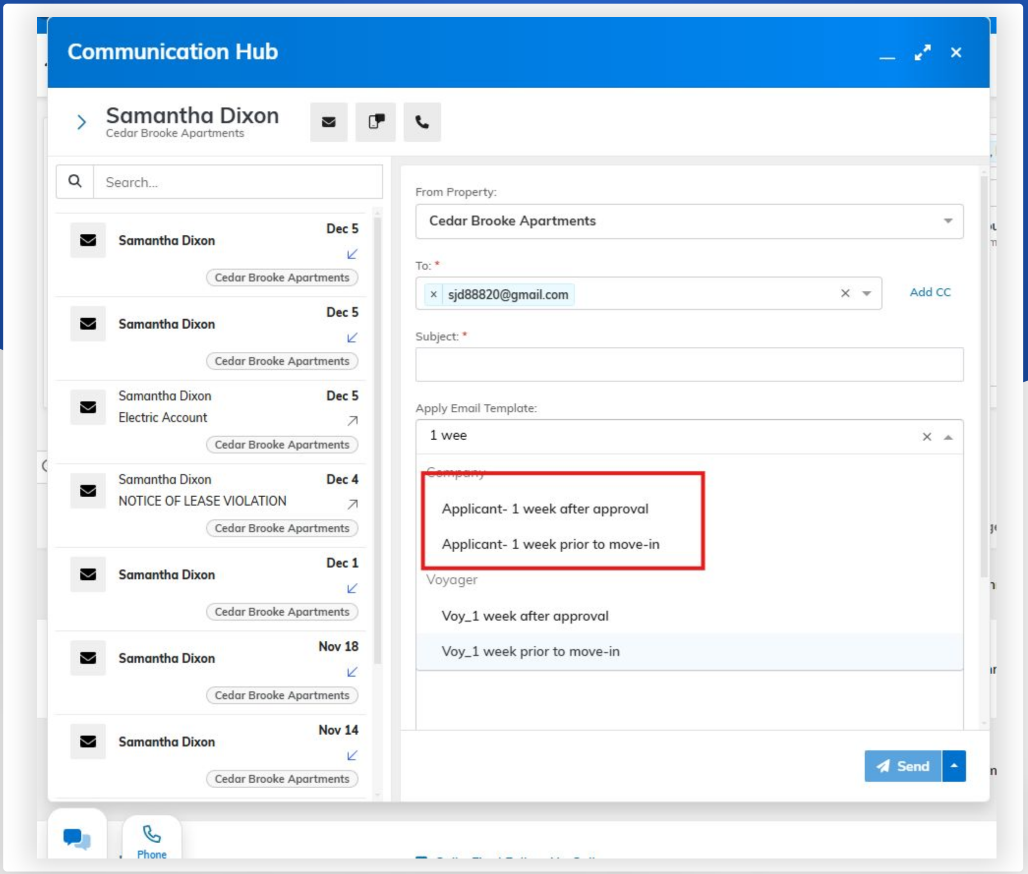
You'll then go to email and send the Prospect- Approved Application Template. Click the com-hub → Email icon → Select the recipient → Click the template drop down → Search or type the template → Wait a few seconds → Preview to make sure no info is needed from you → Send.



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.

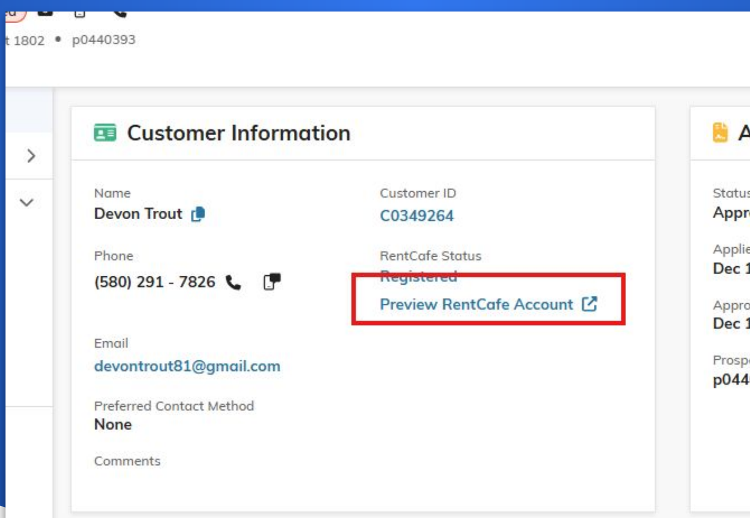


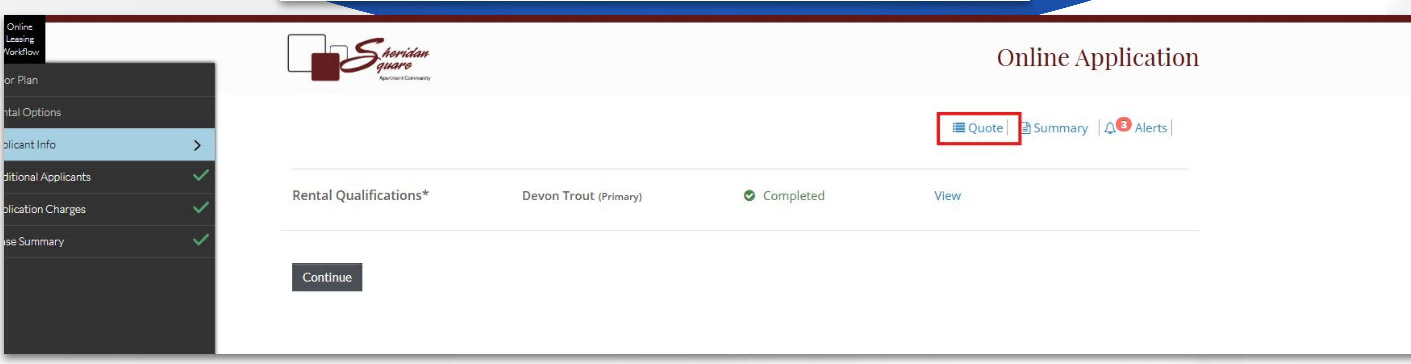
Note: If the applicant is scheduled to move-in asap or within 1 week some follow ups will automatically deactivate themselves.

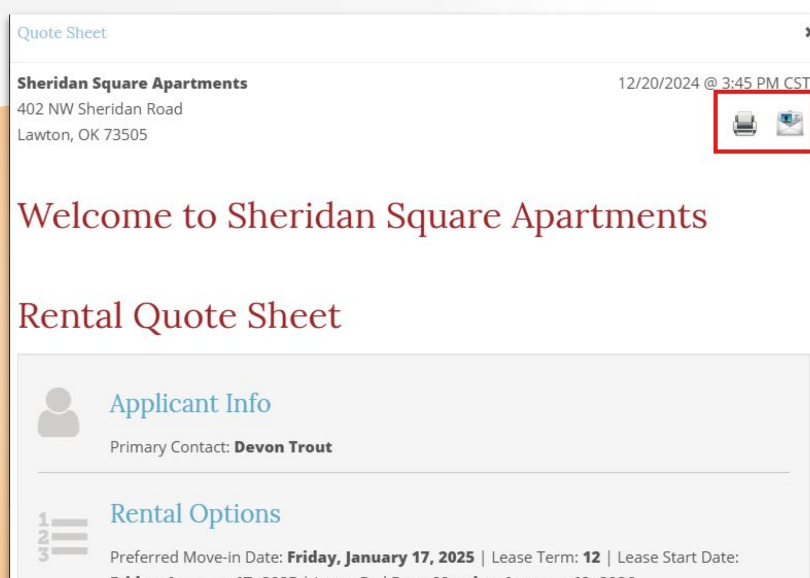
Quote Sheets

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.



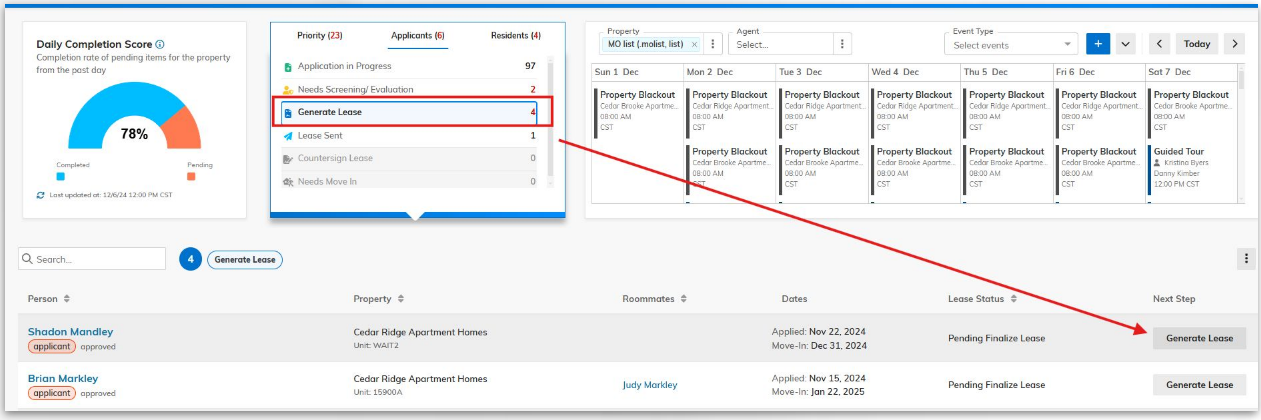




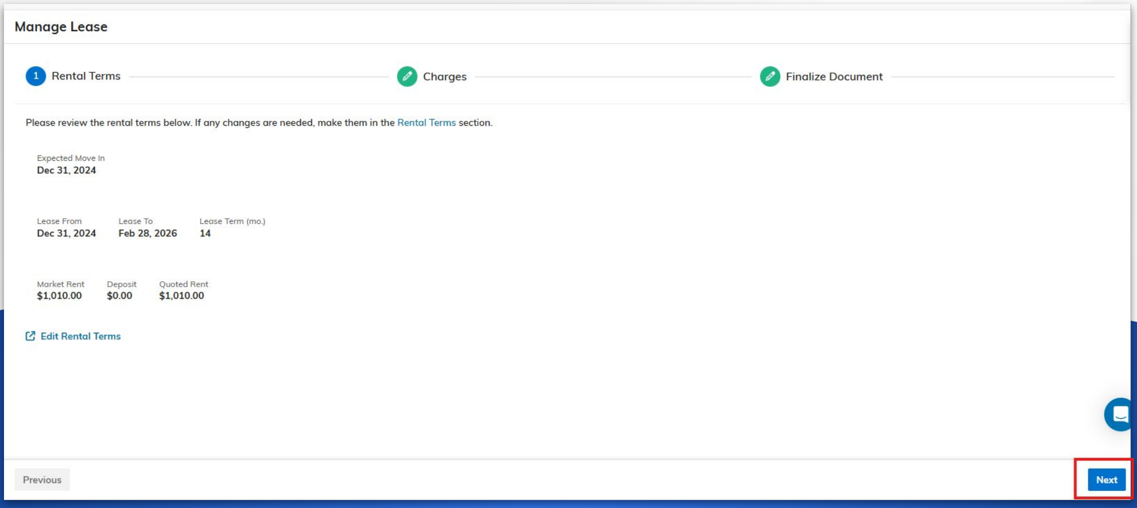
CRM IQ

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.

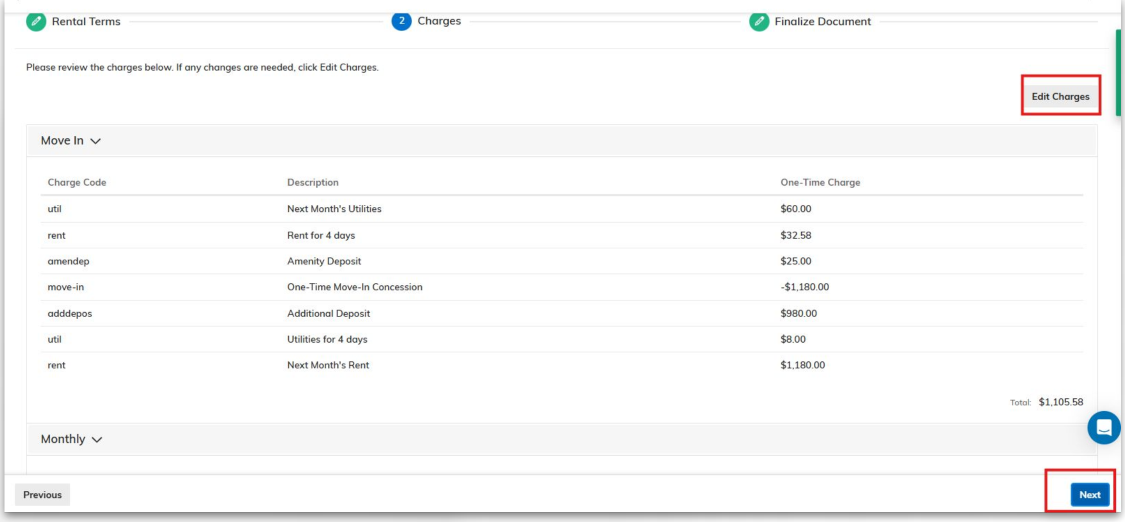


By clicking Generate Lease this will bring you to the manage lease options. You'll review the Rental Terms and then click next. You may make edits if needed.

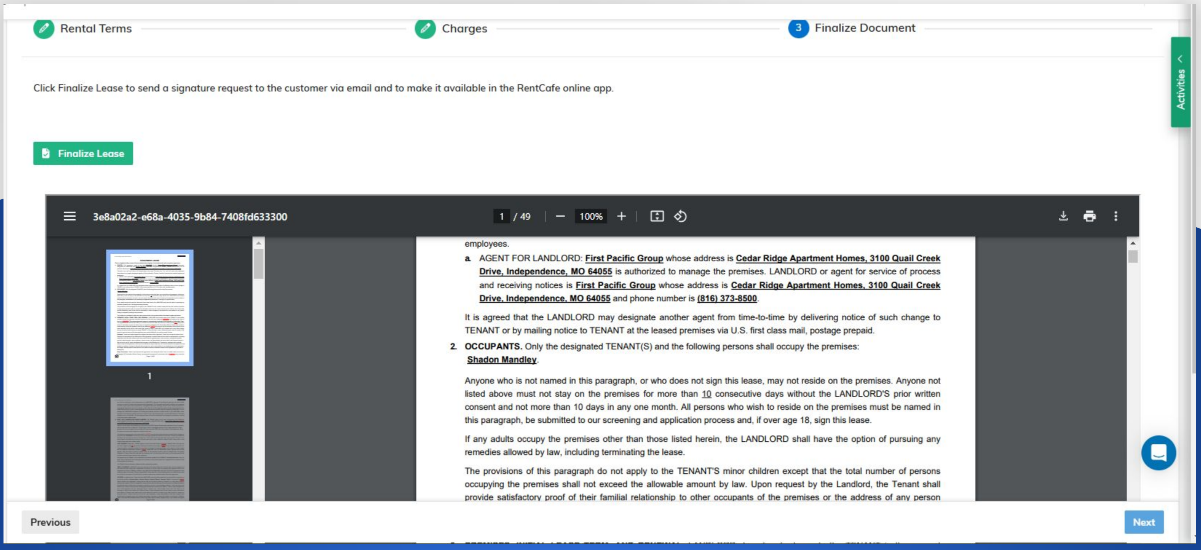


CRM IQ
Lease Generation

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

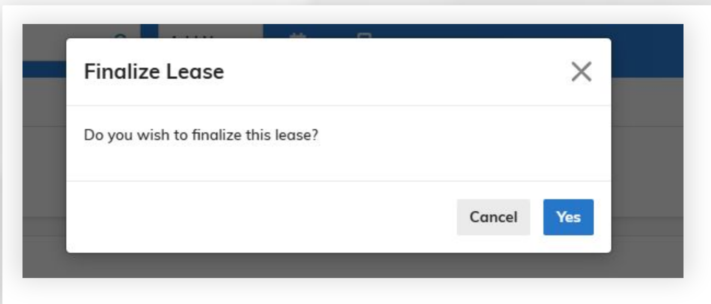


Finally you'll come to the Finalize Document section where all charges, dates, emergency contacts, etc must be reviewed thoroughly. Once completed click Finalize Lease.

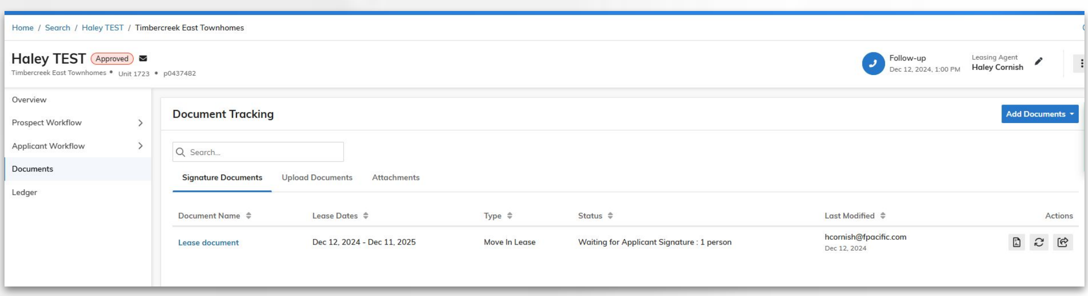


CRM IQ
Lease Generation

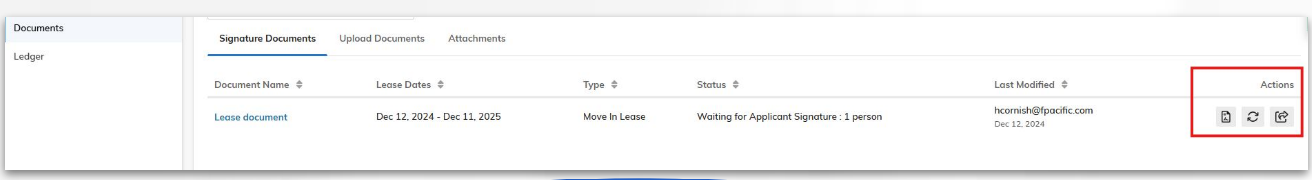
A **Pop-Up Window** will come up asking if you are sure you want to Finalize and generate the lease. Click **Yes.**



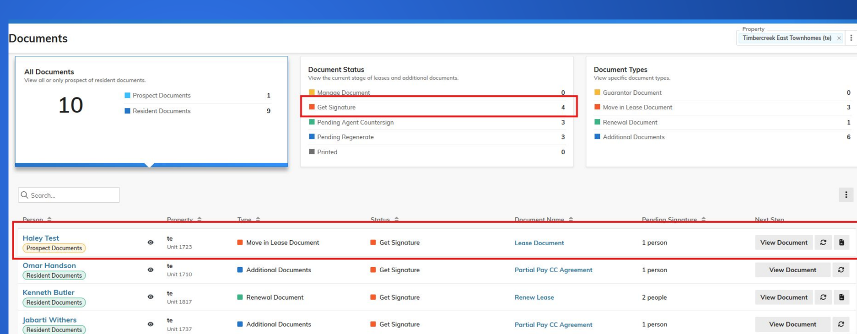
This will send the applicant an email letting them know the lease is ready to be signed. You can view the **Lease Document** by going to the **Documents Dashboard or Documents** in the applicants account.



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

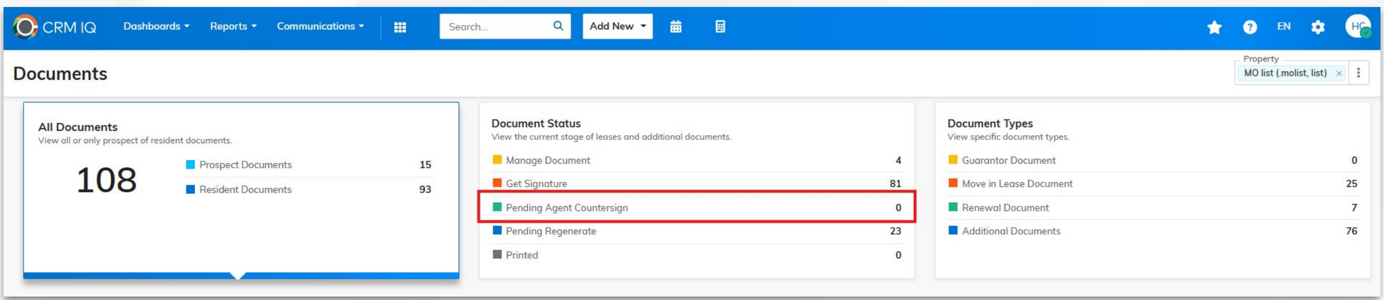


In the documents Dashboard it will tell you if / when the applicant has countersigned or if a roommates signature is missing.

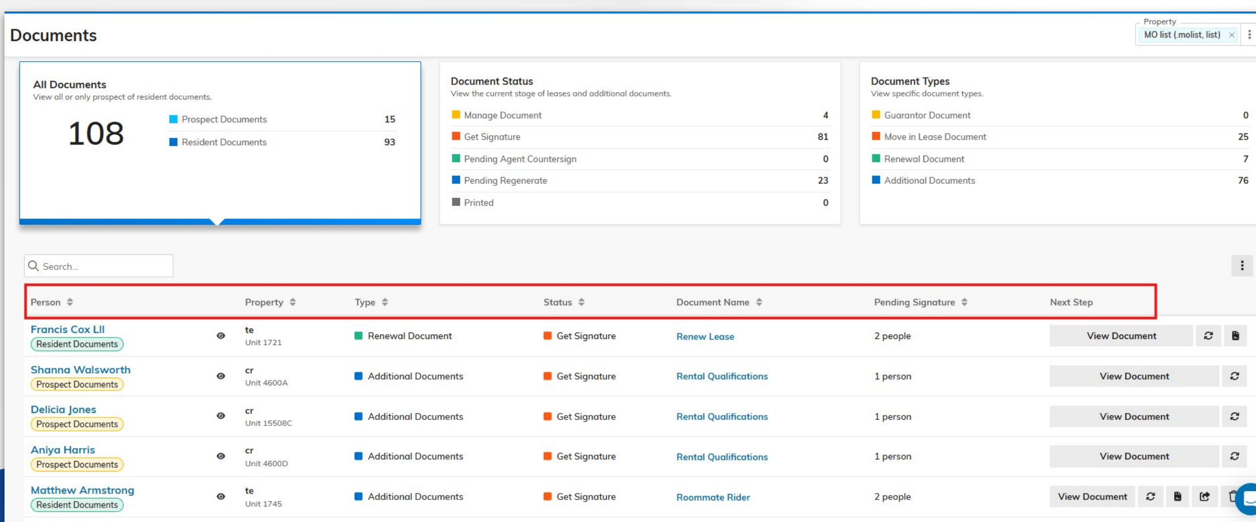


CRM IQ
Lease Execution

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



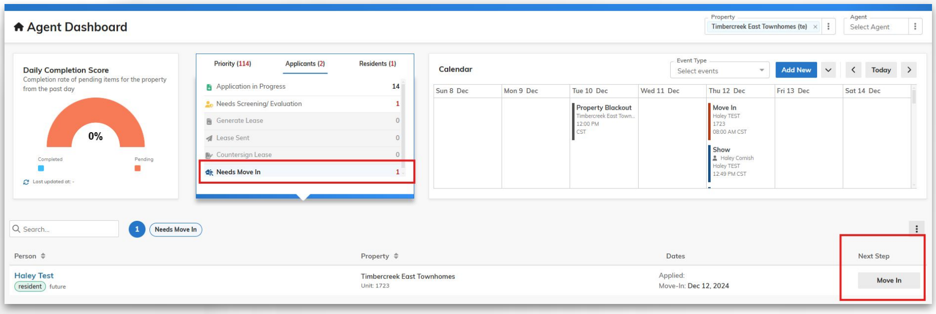
From the **Documents Dashboard**, you will find **Documents that Need to be managed, get signature (residents), Pending Agent countersign, and Pending Regenerate.** From which ever tab you select a list of resident will appear the bottom with the Type, Status, Document name, Pending Signature, and Next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



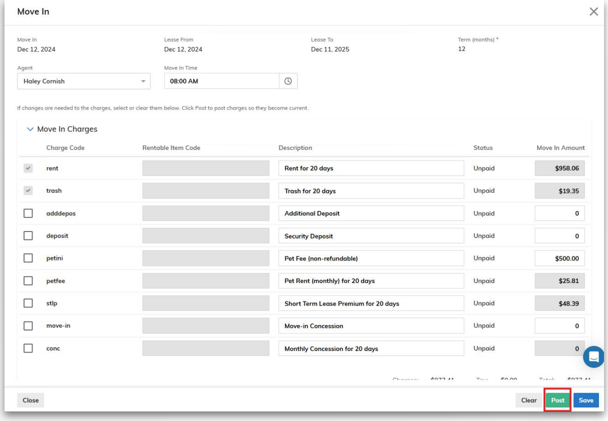
CRM IQ
Move In

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.

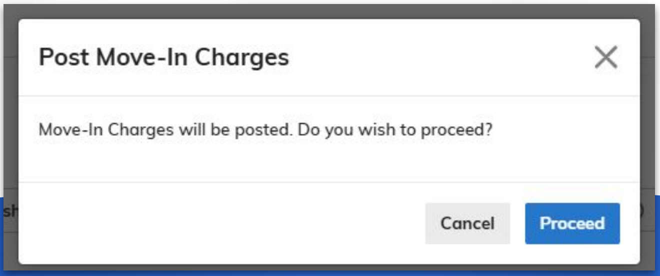
01 | From the Applicant Box go to Needs Move-in. The move-in will show below with the Move In button.



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



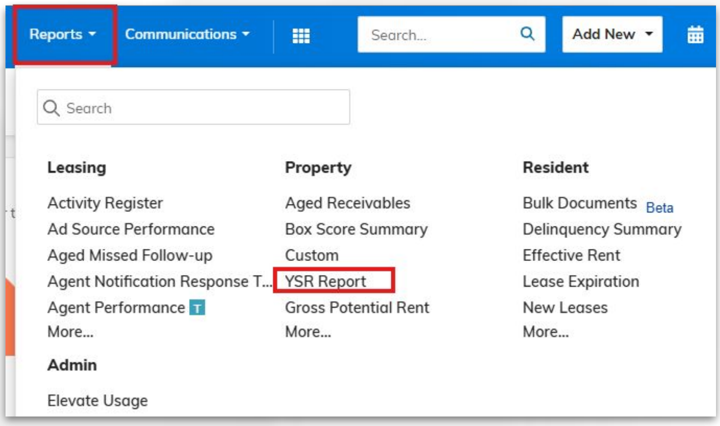
03 | Once you click post a pop up will appear confirming that you are ready to post the charge. Click Proceed and the resident will now be current.



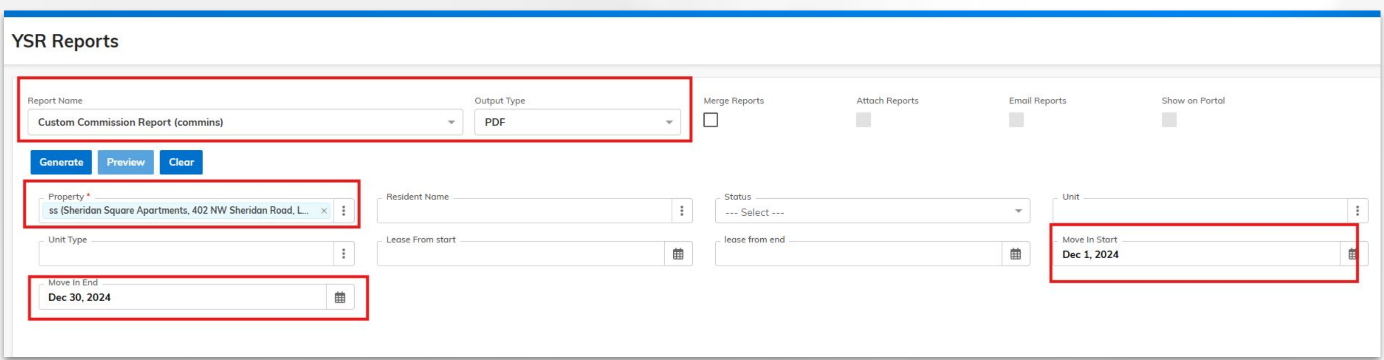
Commission Report

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.

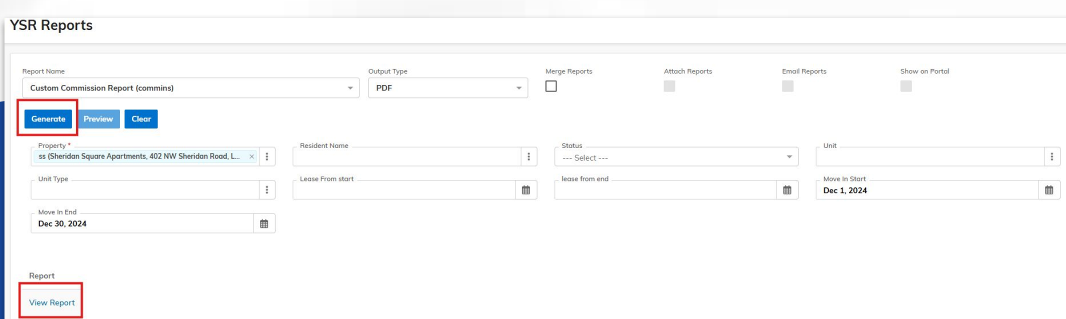
01 | To pull the report click Reports → YSR Report



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.



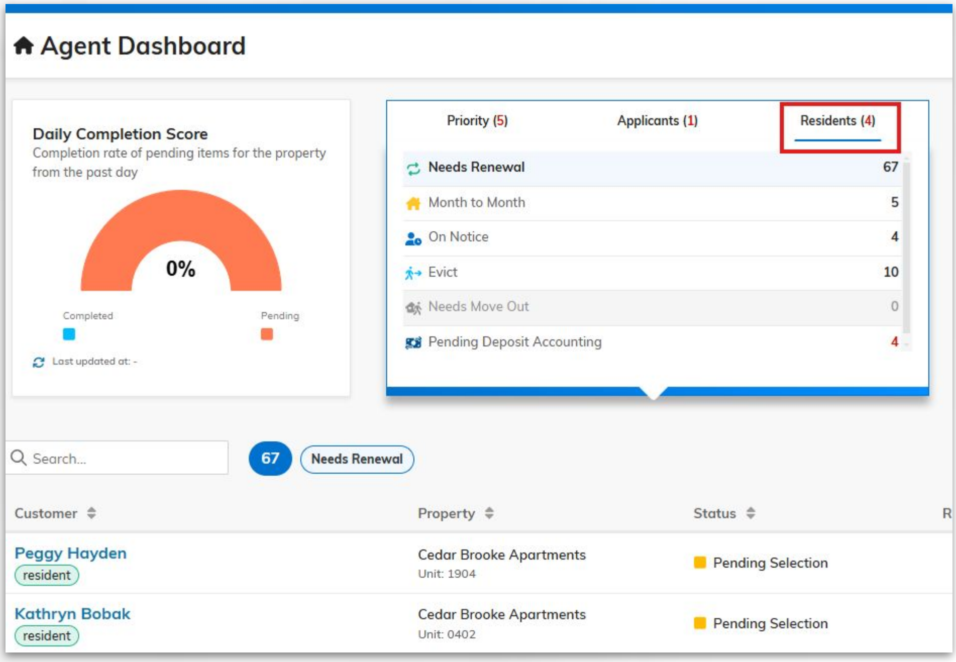
03 | Once dates are entered click Generate → View Report. This will download the report in a PDF for you to review / print.



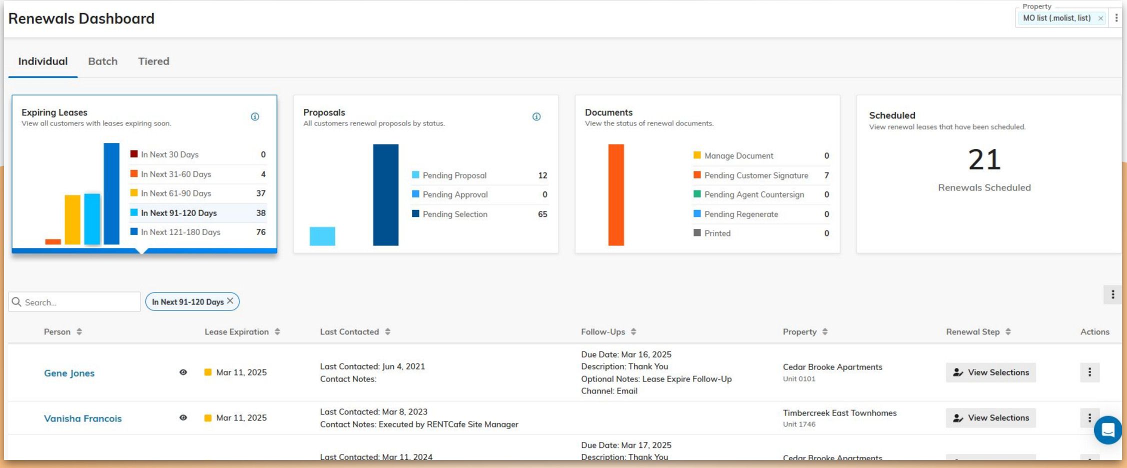
Renewal Lease Generation

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.

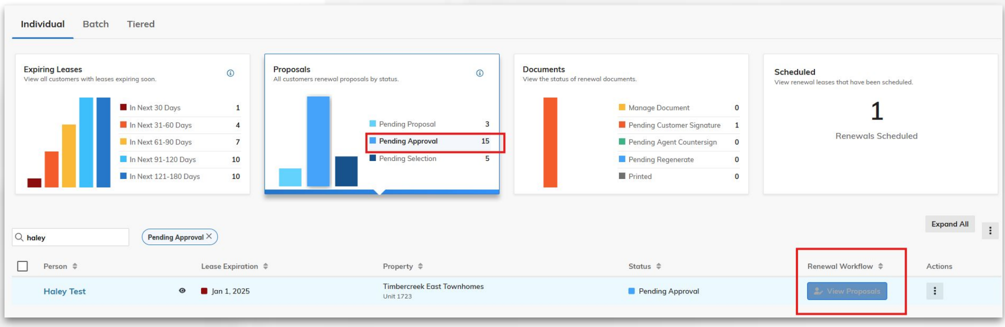


Under the Renewals Dashboard there are a range of things you can do. Review the graph on what's happening between now - 180 days, Review the status of the proposals, Review status of documents, and see how many renewals are already scheduled.

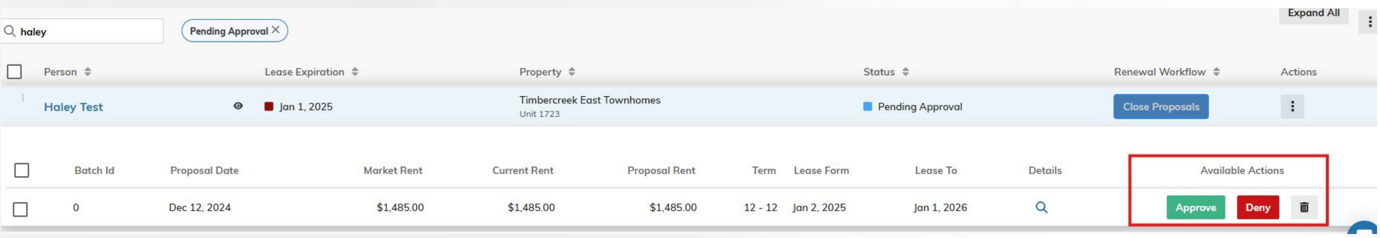


Renewal Lease Generation

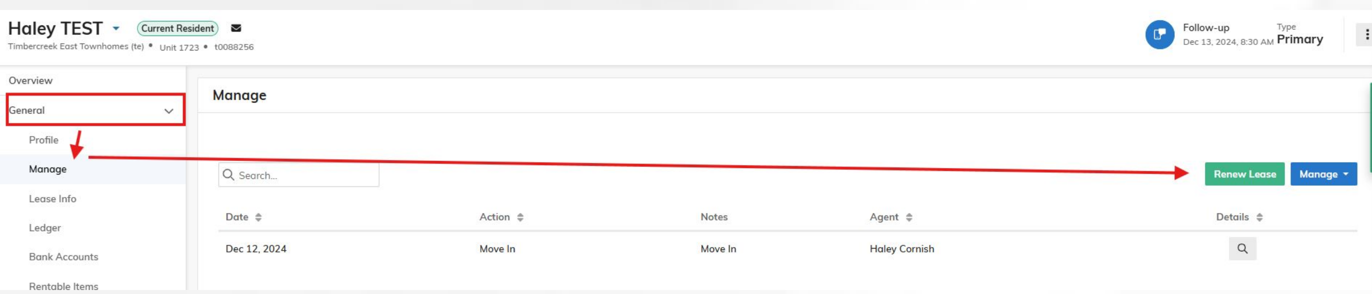
Once proposals are generated you can view them on the Renewal Dashboard → Pending Approval → Find your resident → View Proposals



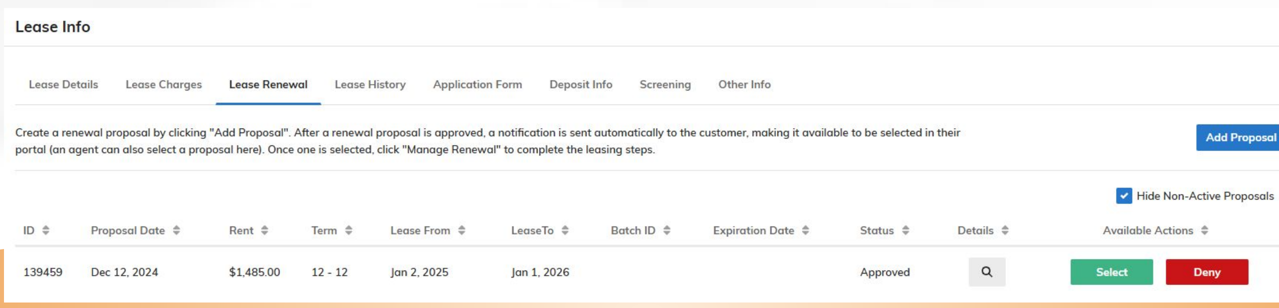
Once you click view you can then approve or deny the proposal.



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

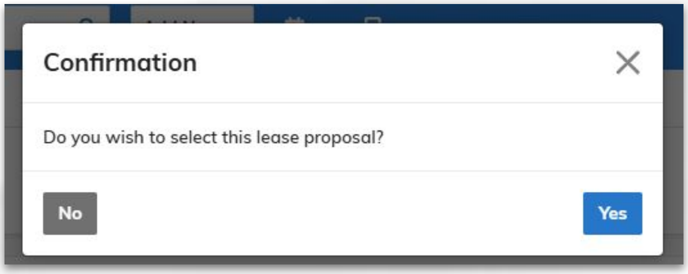


Once opened you can review the proposal , select, or deny it.

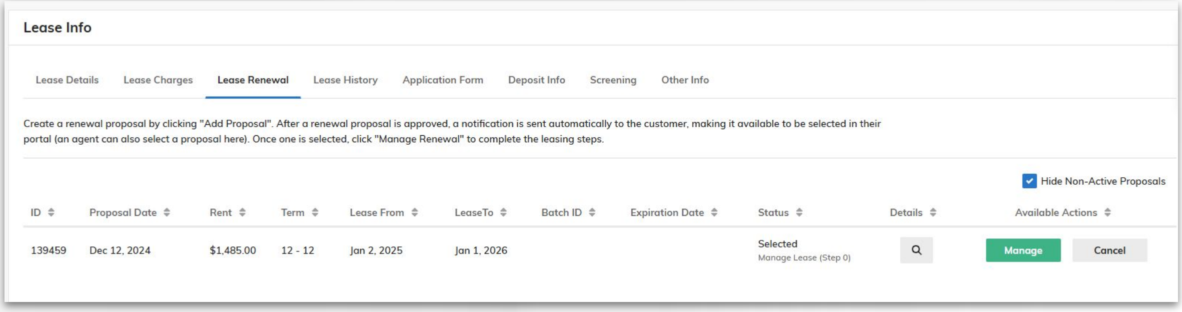


Renewal Lease Generation

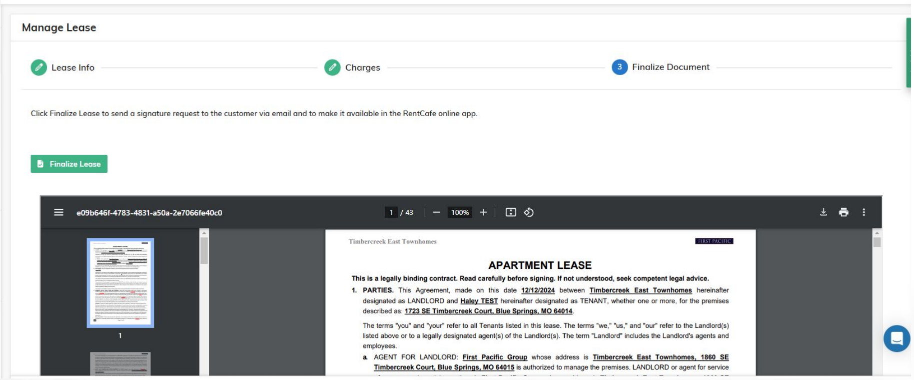
Once selected a pop up will appear to confirm you want to proceed with the proposal. Click Yes.



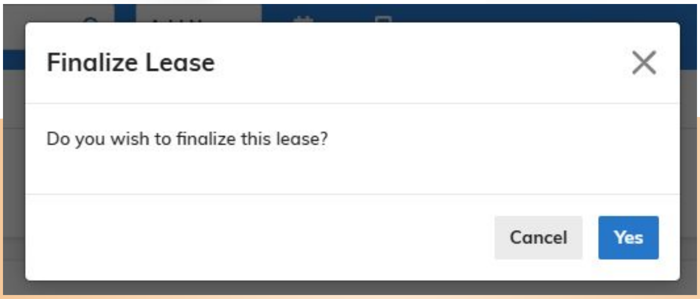
You then will be able to manage the document.



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

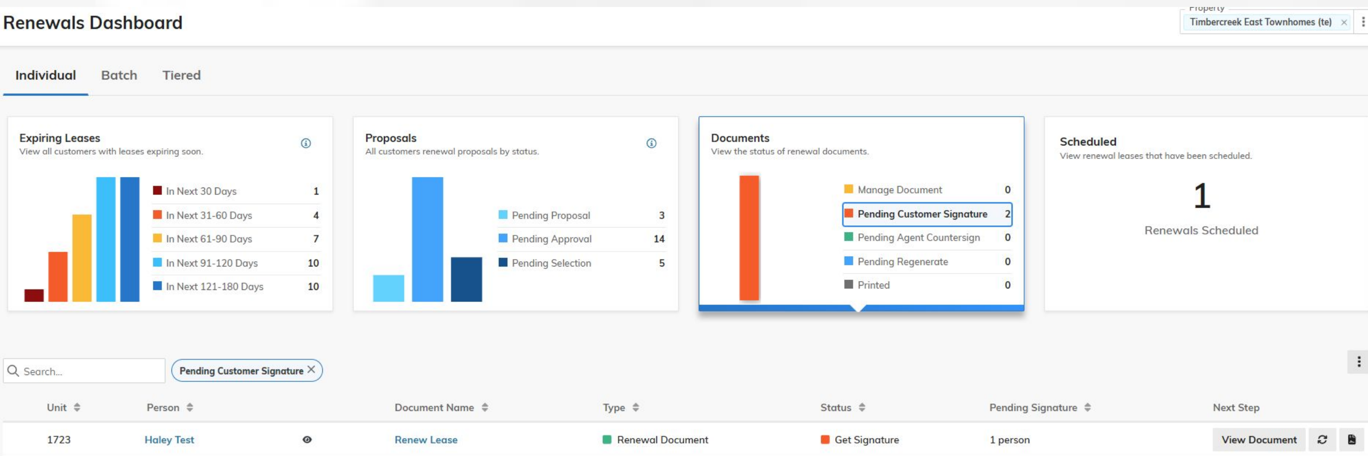


Another pop up will appear confirming that you want to finalize. Click Yes.

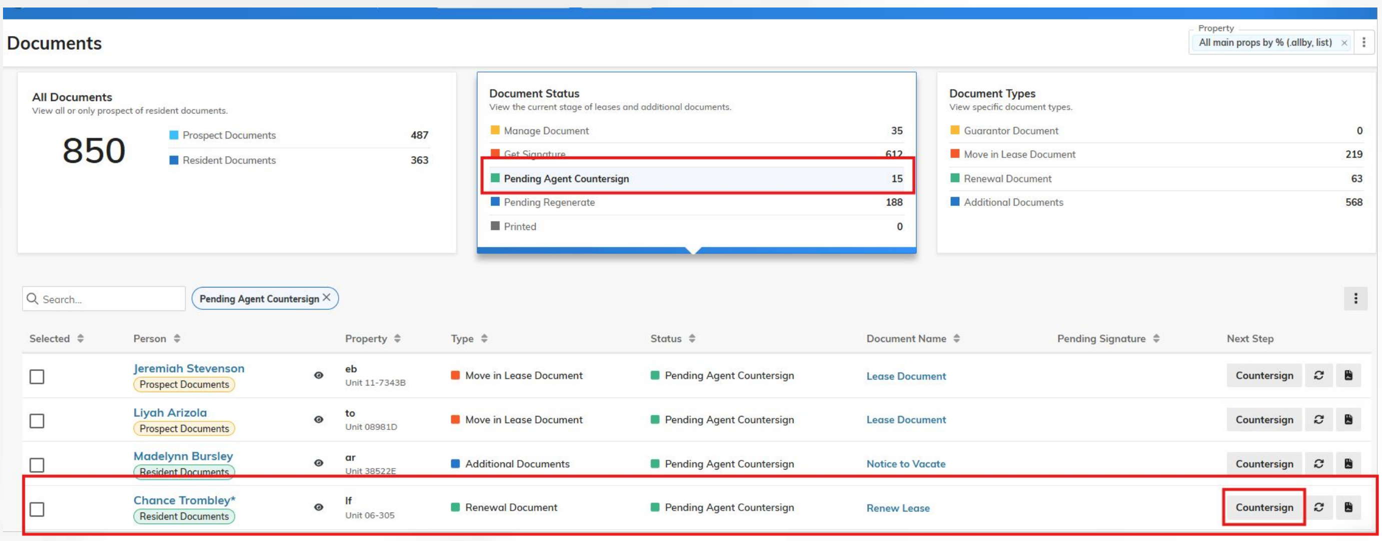


Renewal Lease Generation

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



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!

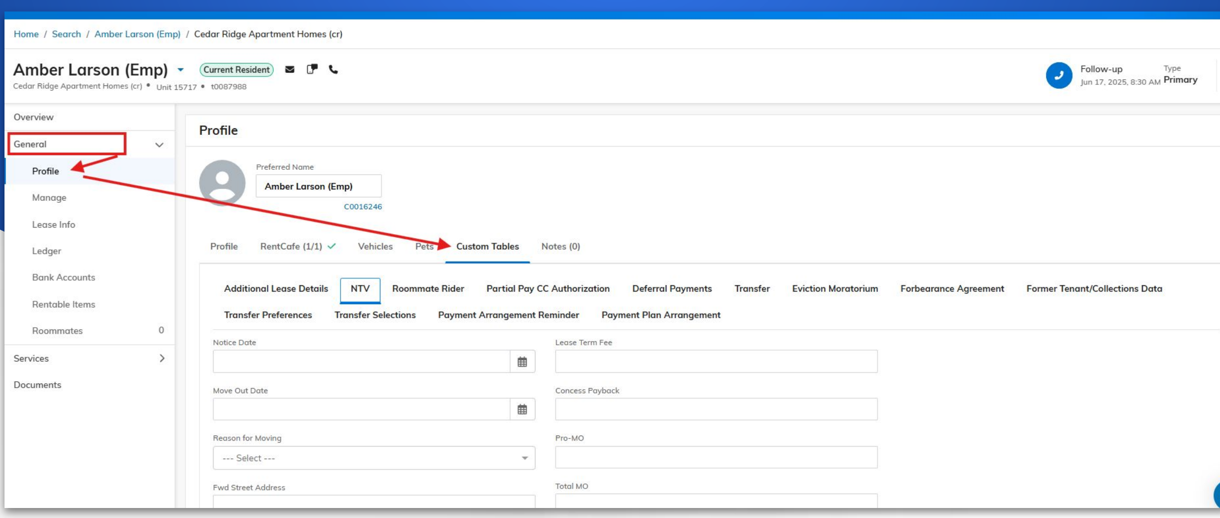


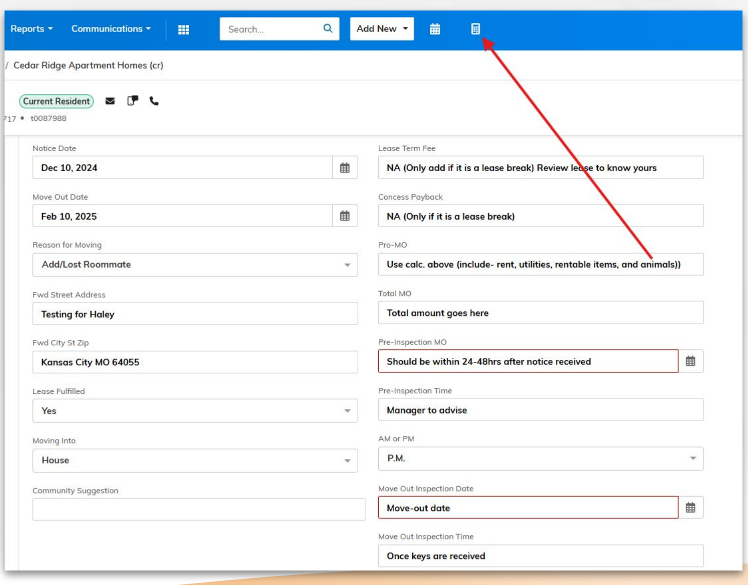
NOTICE TO VACATE

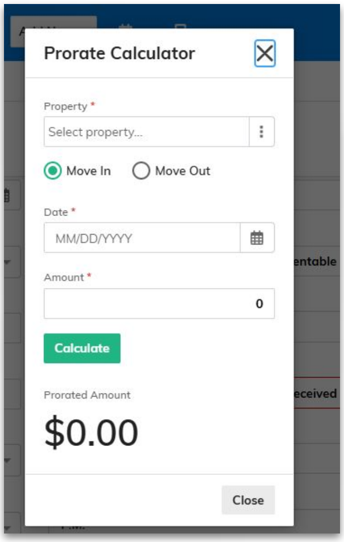
Locate the Resident Account in CRM IQ by navigating the following :

- 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.



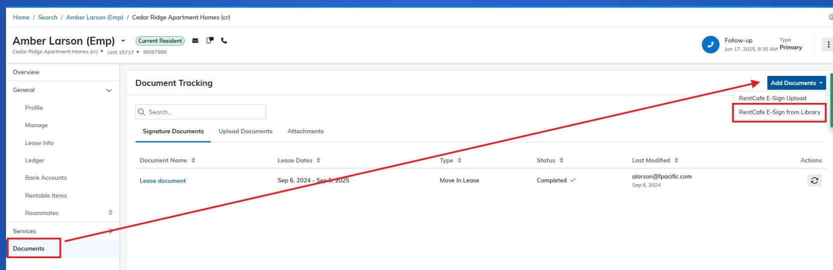




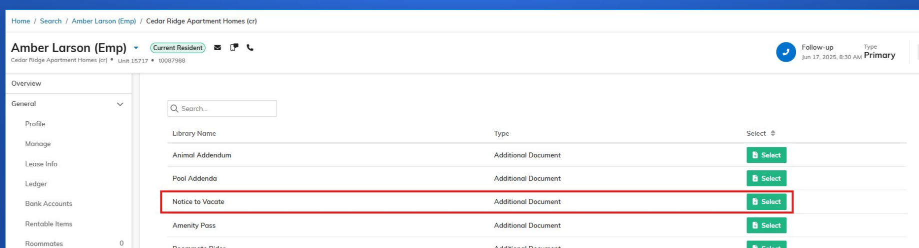
NOTICE TO VACATE

CRM IQ

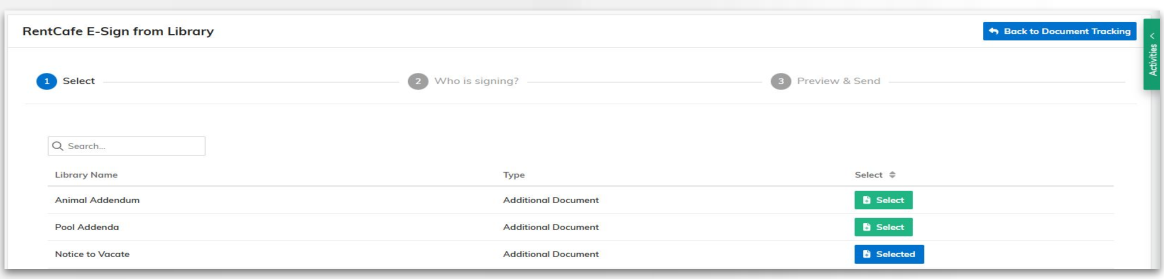
To send the document on the left hand menu click Documents → Add Documents → RentCafe E-Sign from Library.

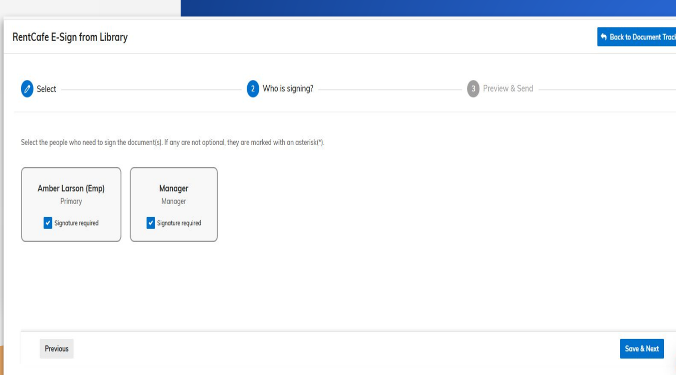


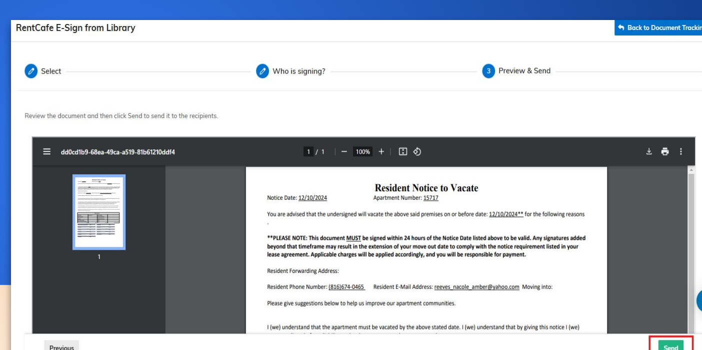
Select your document



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



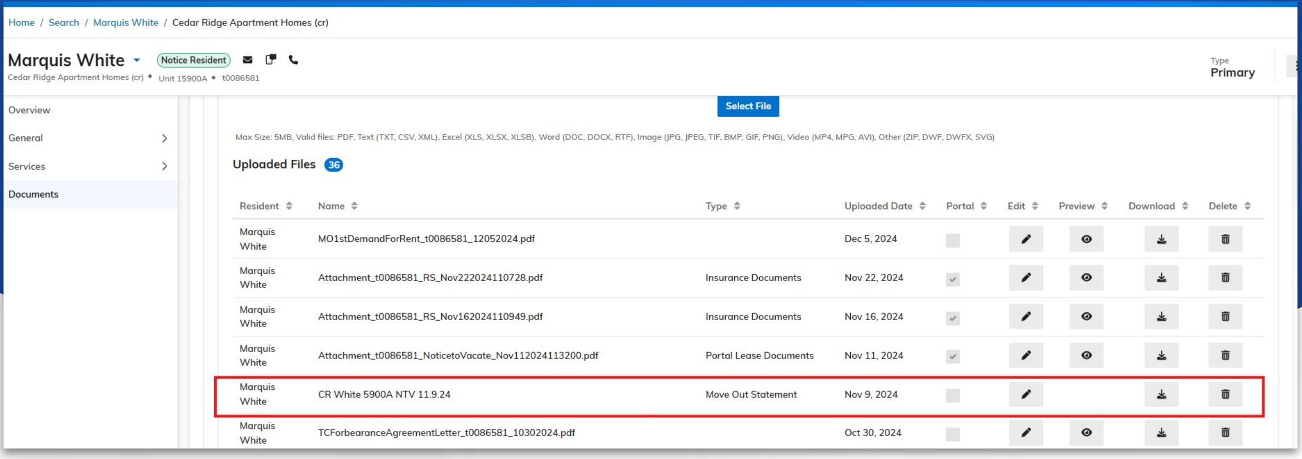




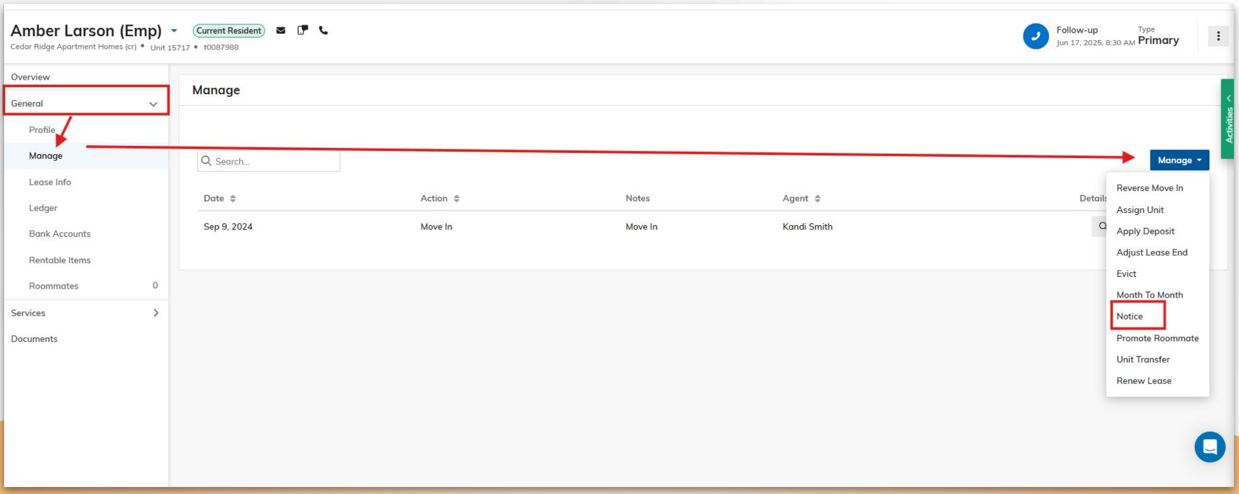
CRM IQ

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.

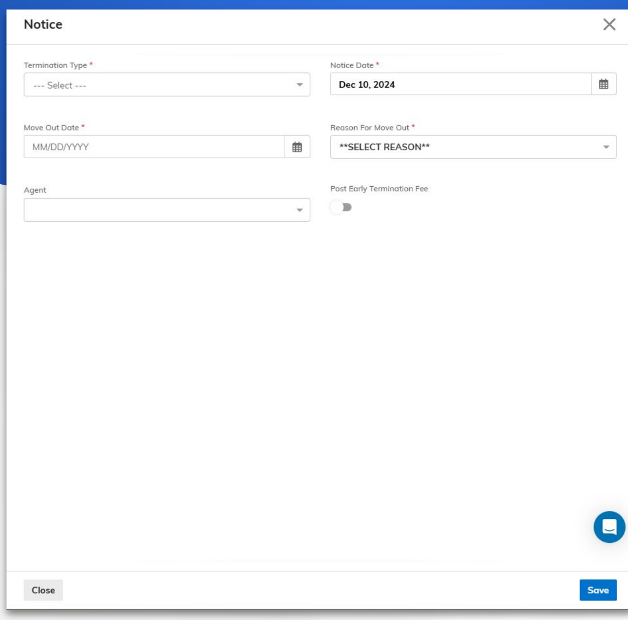


Now that there is a fully executed document, you will complete the CRM IQ Notice function by navigating to the Resident Overview → General → Manage → Manage → Notice.

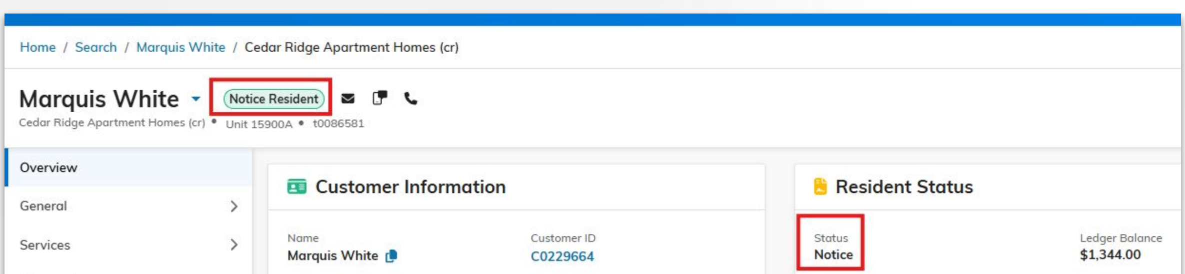


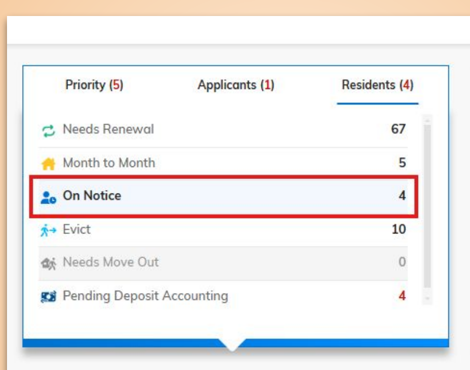
NOTICE TO VACATE

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.



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

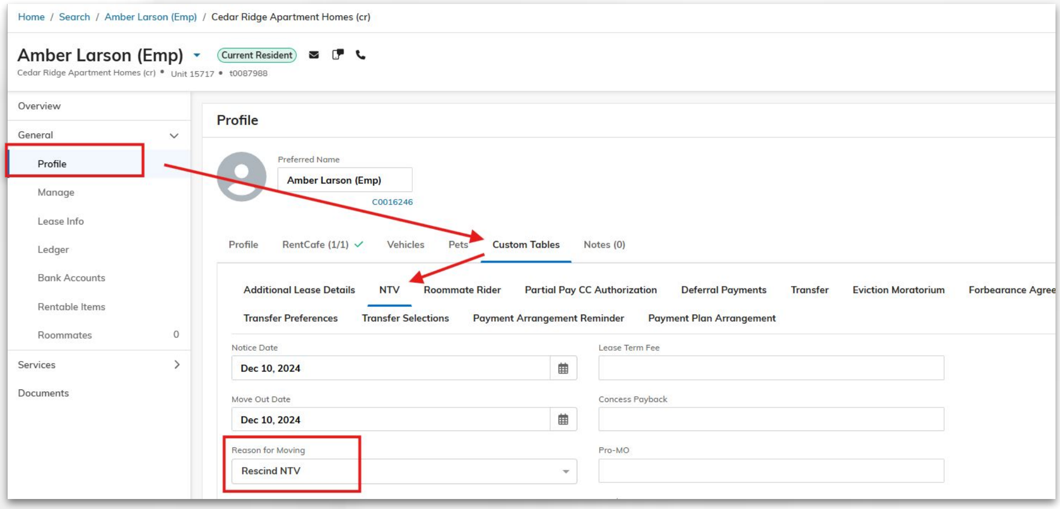




Cancelling A Notice to Vacate

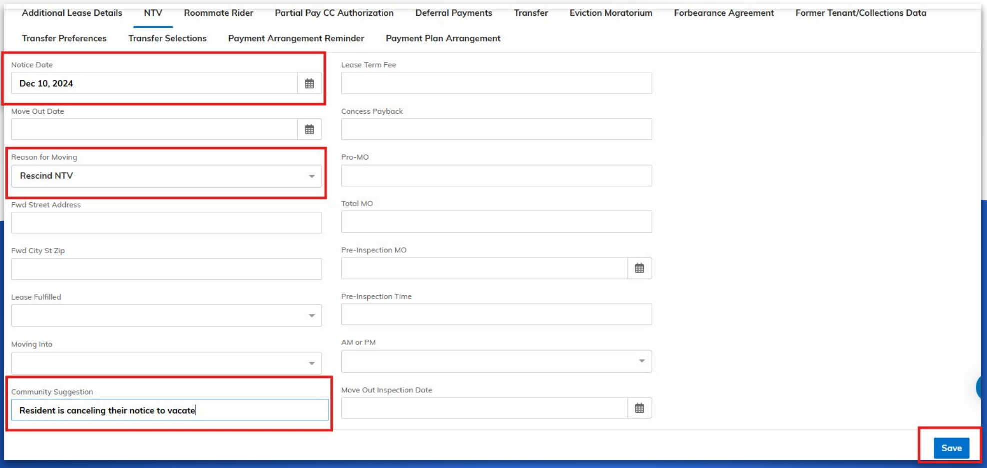
If a Resident notifies you that they would like to cancel their Notice to Vacate, you will need to regenerate the NTV form for them to sign to rescind their notice.

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



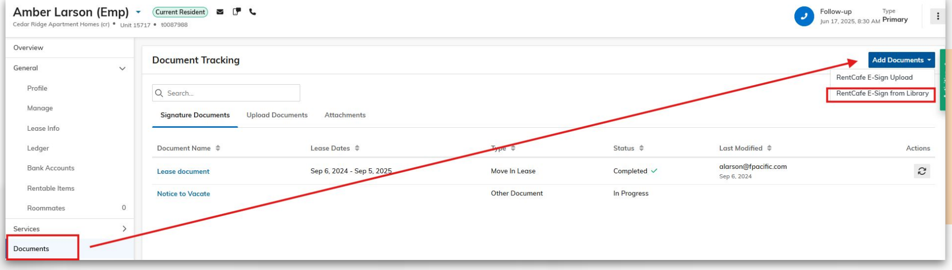
You will notice all of the old information is still populated into the **Filter** fields. These will need to be cleared out and only the **Date, Reason for Moving** and **Community Suggestion** will be filled out with the following information.

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

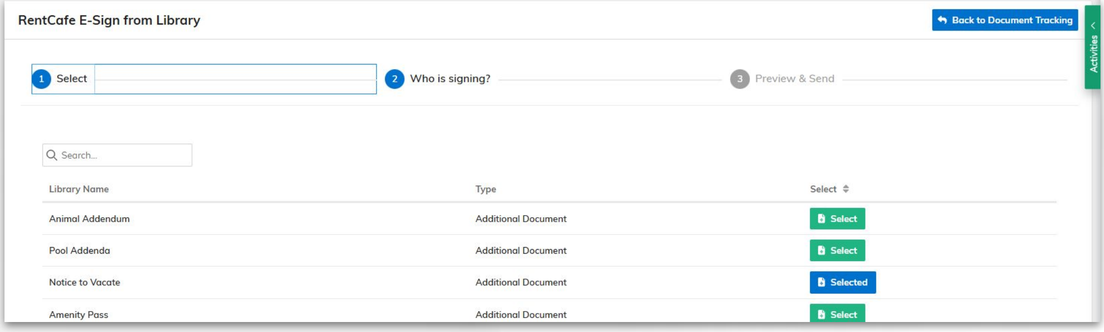


Cancelling A Notice to Vacate

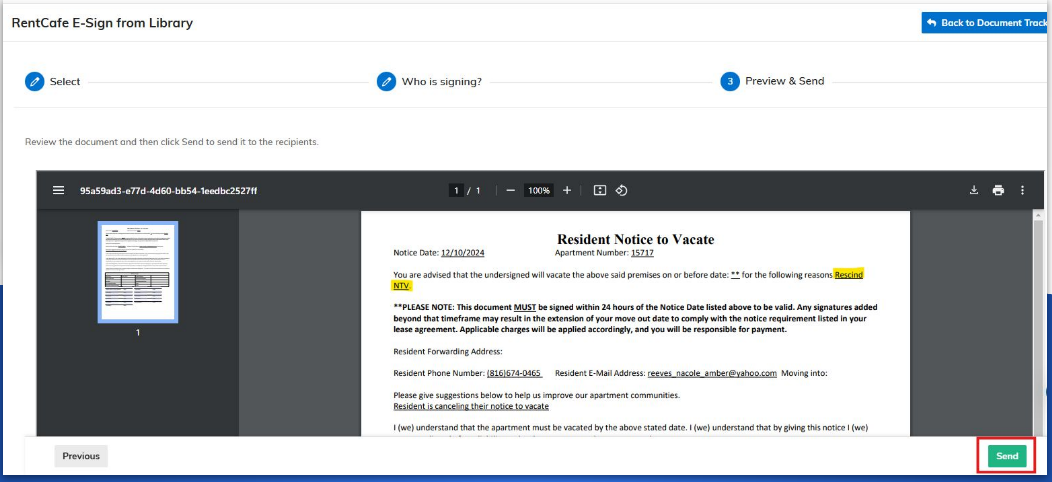
After Saving the info go to Documents → Add Documents → RentCafe E-Sign from Library



Select Notice to Vacate and review who is signing.

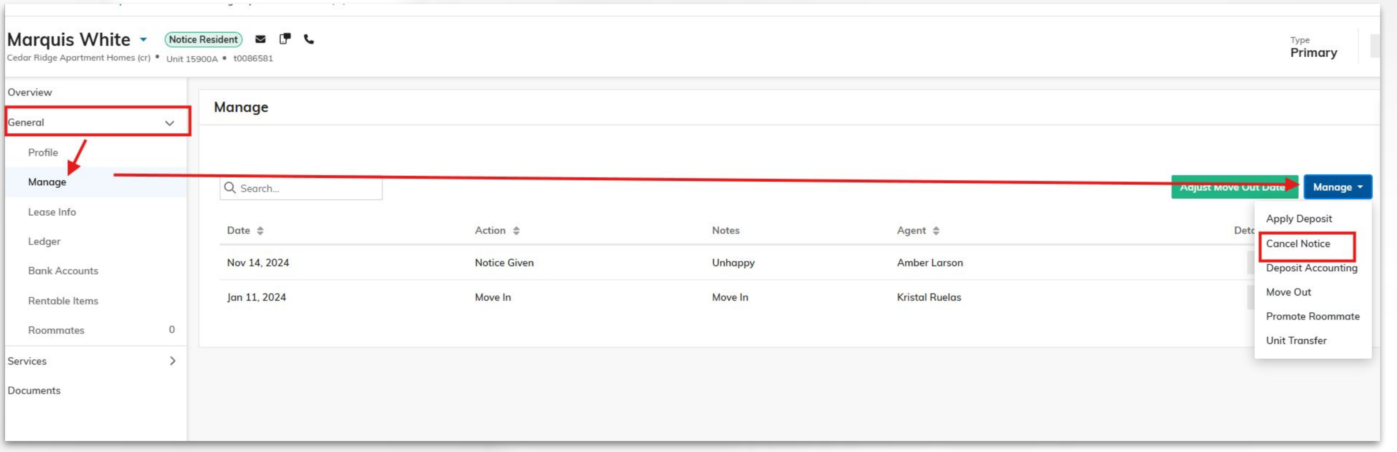


This will bring you back to the Preview & Send. Verify that the info has updated and click Send.

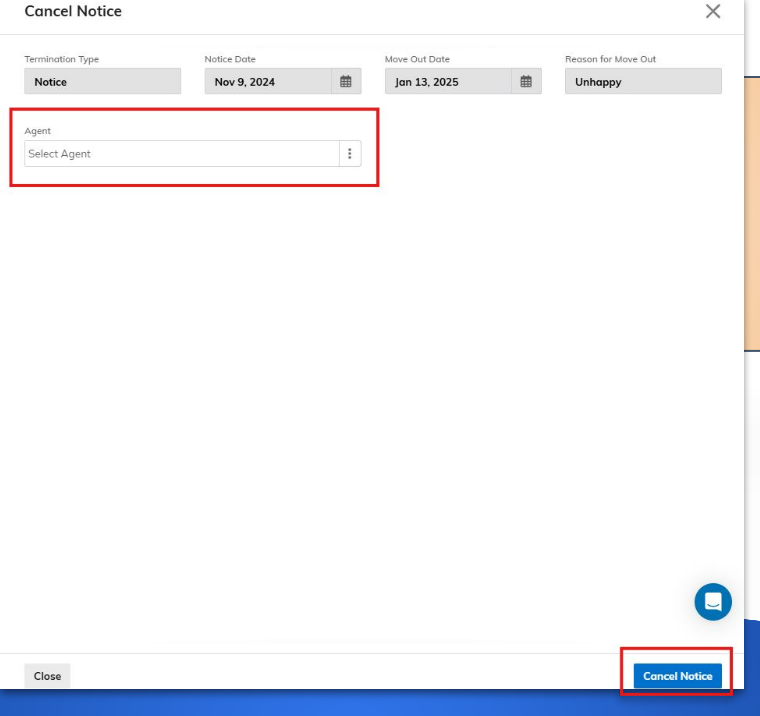


Cancelling A Notice to Vacate

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.

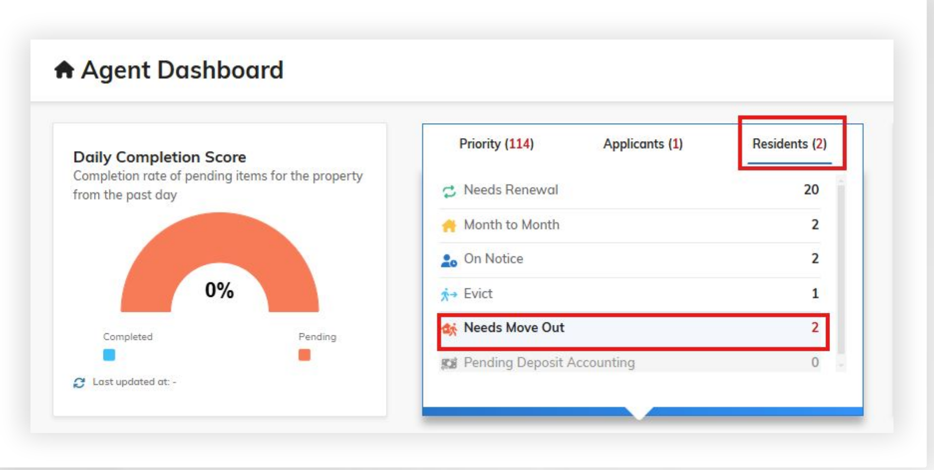


This brings you to the **Cancel Notice** screen. Update the Agent and click Cancel Notice.

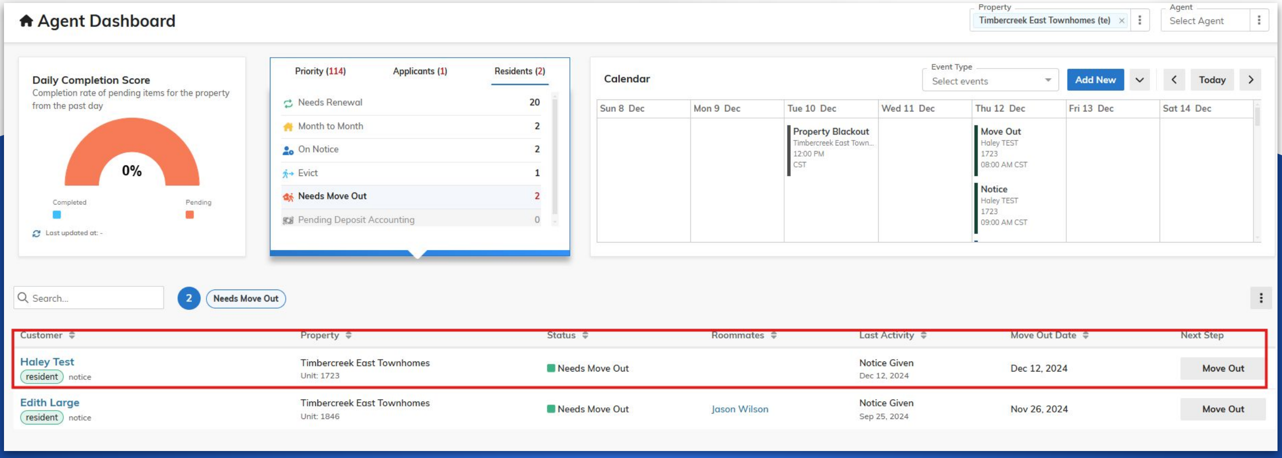


CRM IQ
Move Out

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

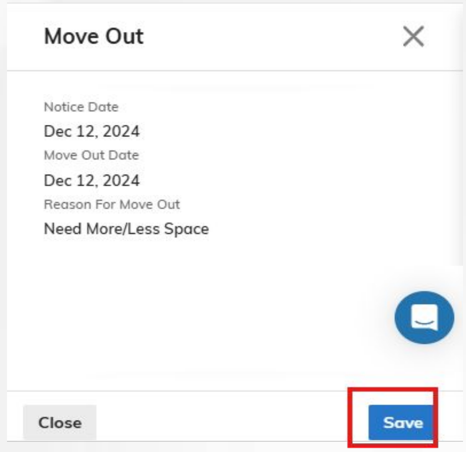


This will show all pending move outs for the day. Choose your resident and click Move-out

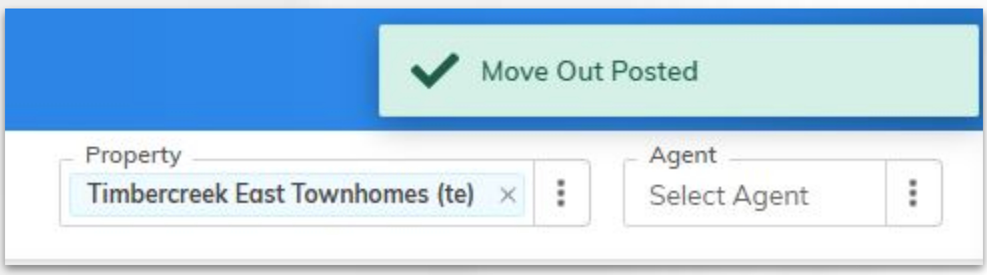


CRM IQ
Move Out

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

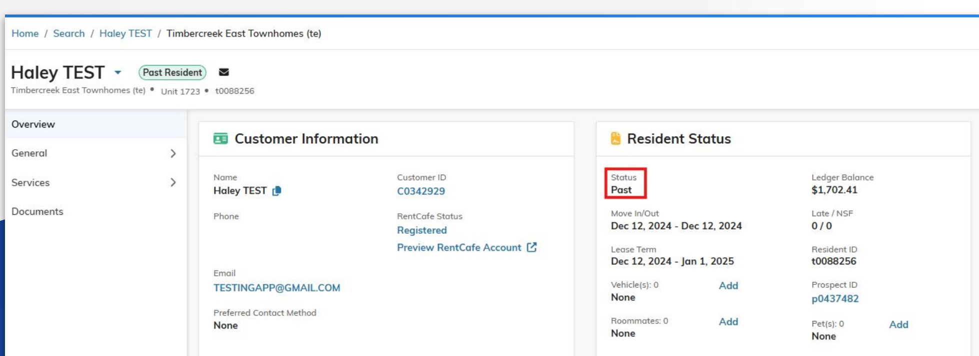


Another pop up will appear confirming that the move-out has posted.



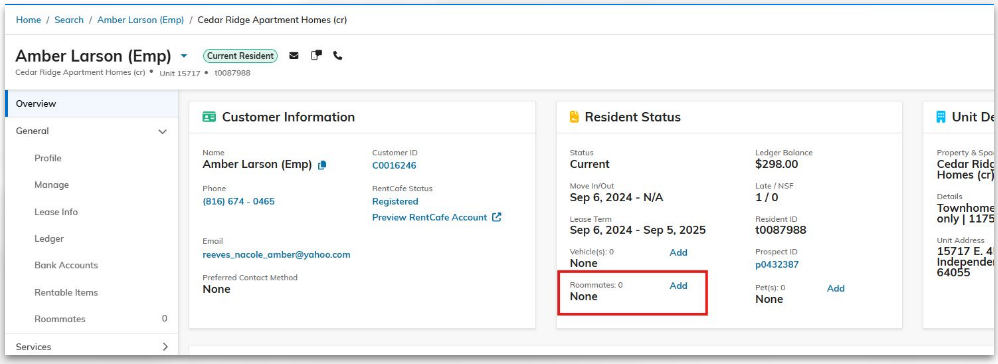
This will update the Resident's Status from Notice to Past.

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



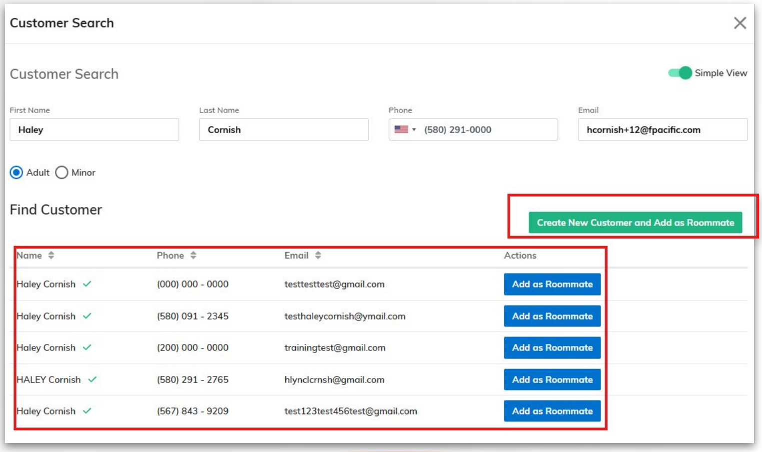
Adding A Roommate to A Current Resident

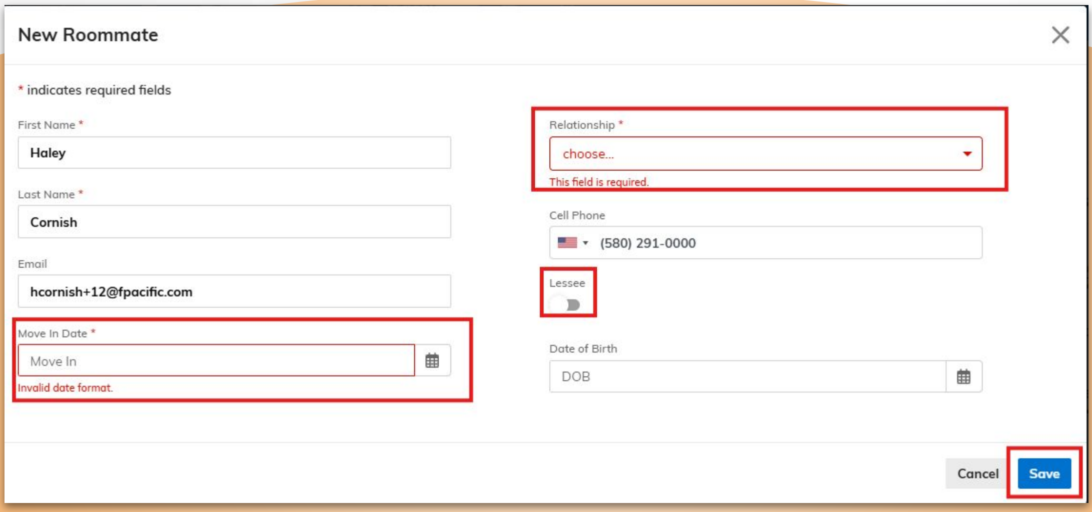
To add a new roommate to an existing resident's account, simply click Add under the Resident Status.



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 and existing one below.

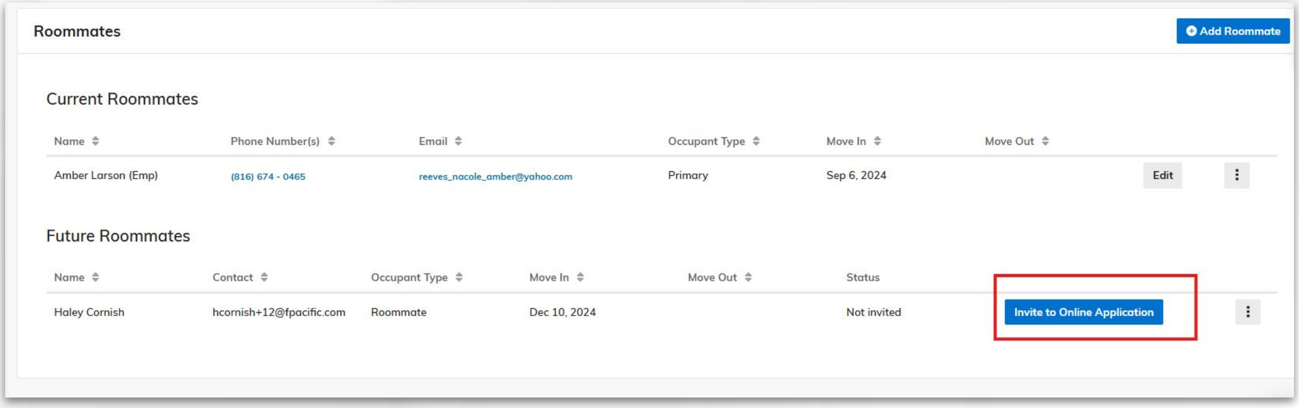
If you select Create New Customer you'll need to select the Relationship, Move-in Date, Toggle Lessee if an adult, and click Save.





Adding A Roommate to A Current Resident

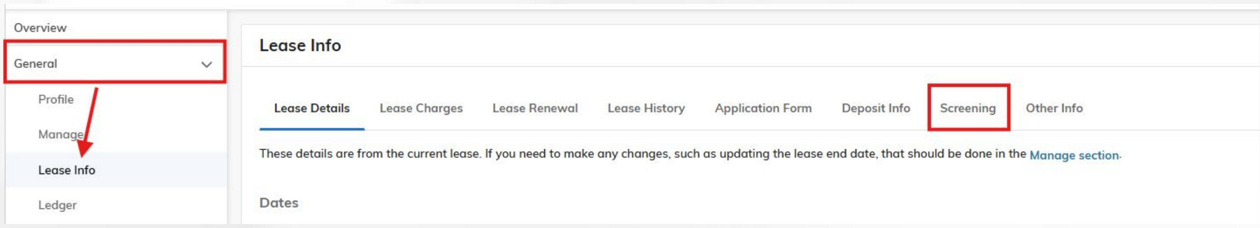
Once you click Save, you will need to click **Invite to Online Application** button.



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.

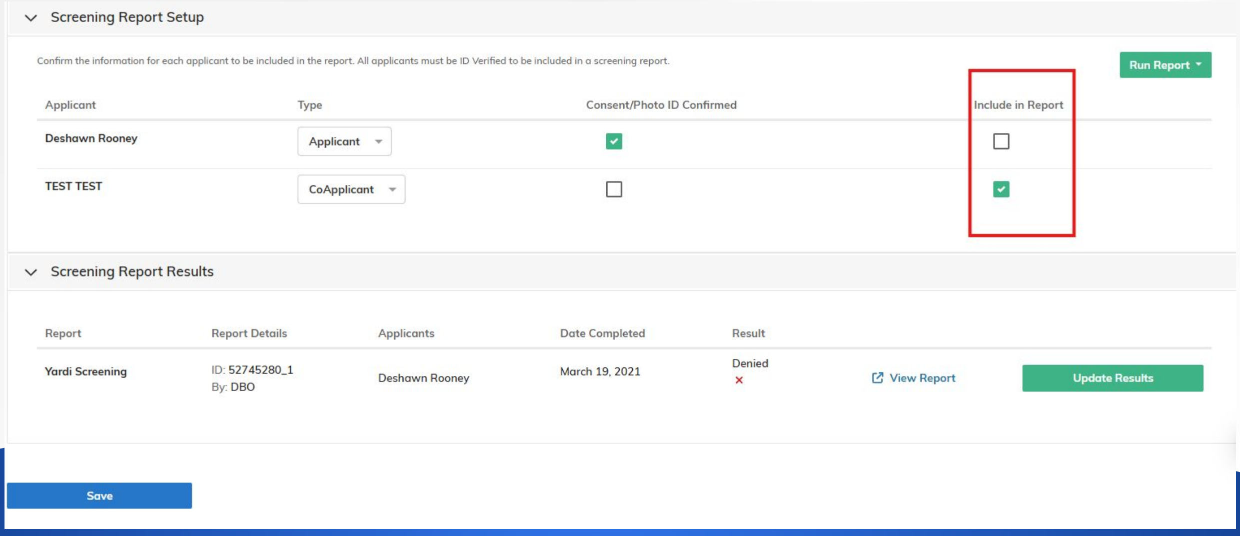
CRM IQ
Screening Manually

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



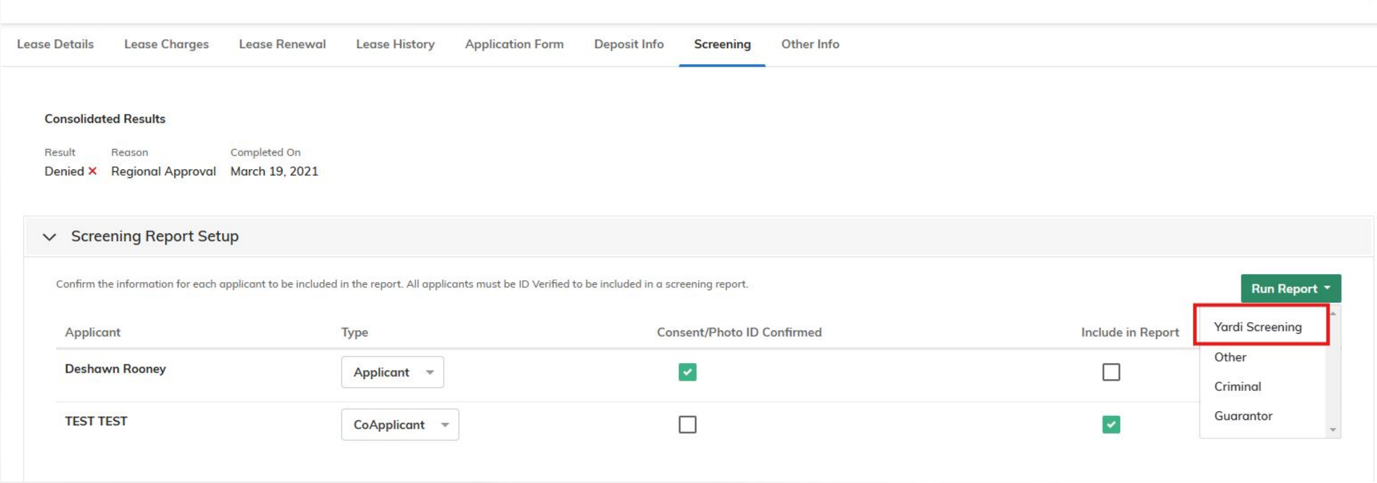
This will bring up the screening information for all applicants including the current resident(s) with their initial screening decision information. Since we are adding a new roommate, we <u>DO NOT</u> want to re-screen the current residents. Uncheck the current resident from include in report.

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.

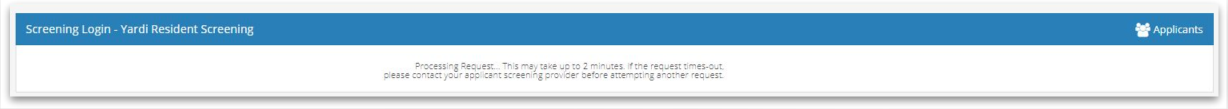


CRM IQ
Screening Manually

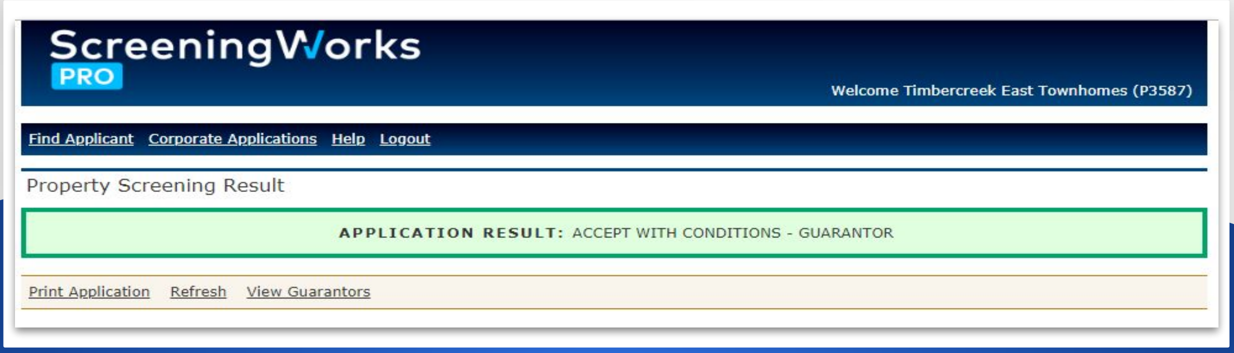
If everything is accurate click the report drop down and select Yardi Screening.



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



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



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.

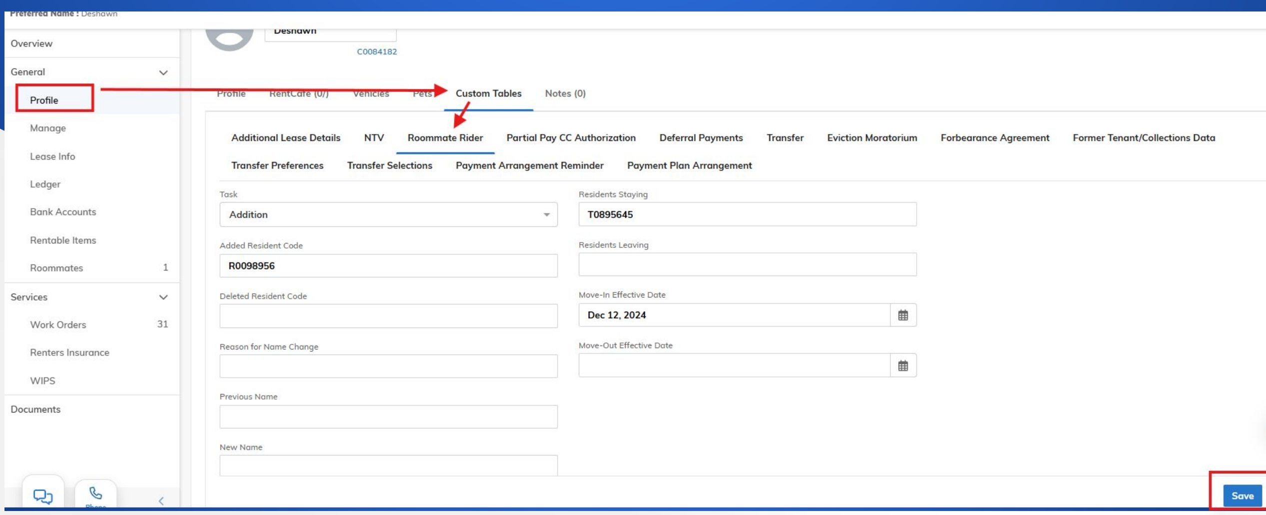
- Once approved by Ruanne, your manager will generate the Roommate Rider.

    - 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.

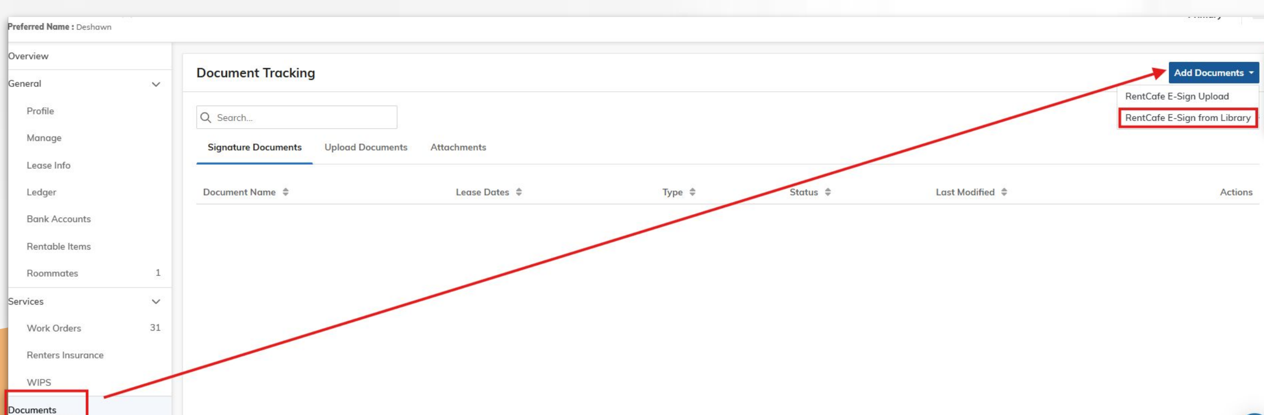
    - If a roommate is leaving, you can use the Roommate Rider as instructed.

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

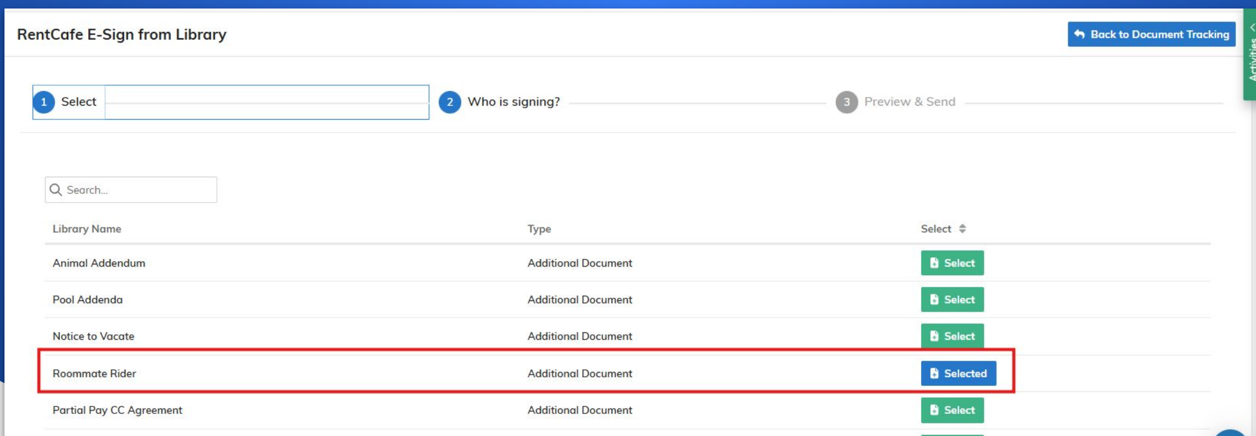


You'll then go to Documents → Add Documents → RentCafe E-Sign from Library

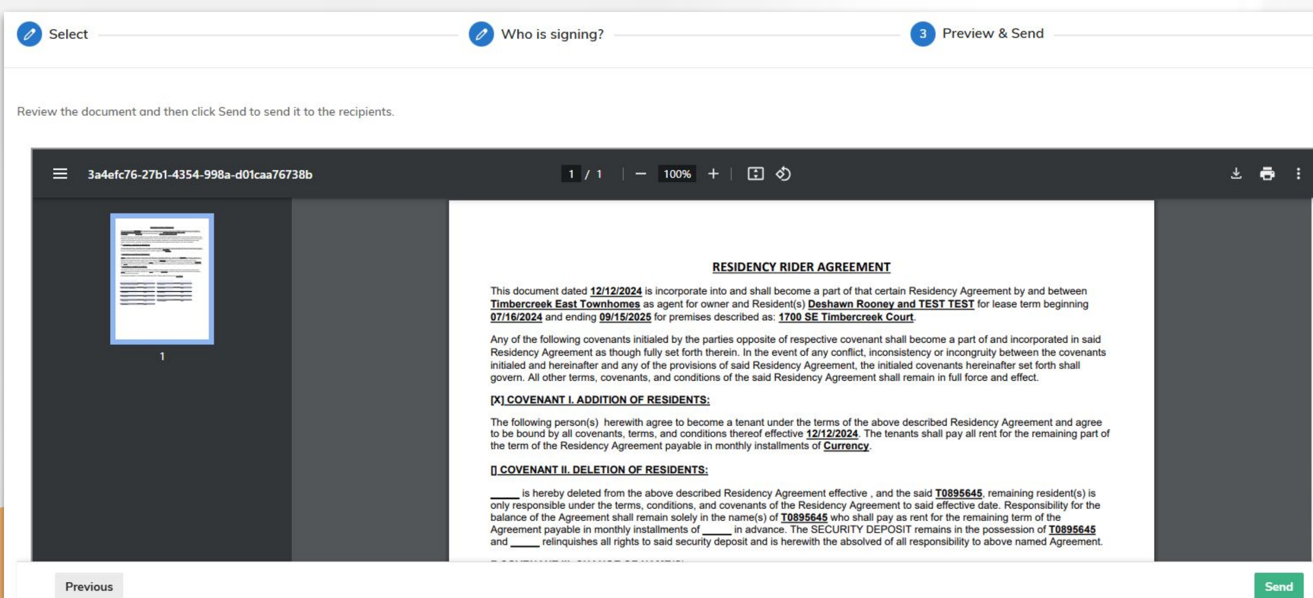


Roommate Rider

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



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



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.

CRM IQ

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.

CRM IQ

Unit Transfer Policy

FIRST PACIFIC

FIRST PACIFIC GROUP, INC.

TRANSFER POLICIES AND GUIDELINES

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

Current Address ______________________ Property:__________

New Address ______________________ Property:__________

NEW RENT $__________ TRANSFER DATE: __________

NEW DEPOSIT $__________ LEASE TERM: __________

__________________ RESIDENT

__________________ RESIDENT

__________________ COMMUNITY MANAGER

Inspection

INSPECTED BY __________________, DATE INSPECTED __________________

Unit Transfer

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

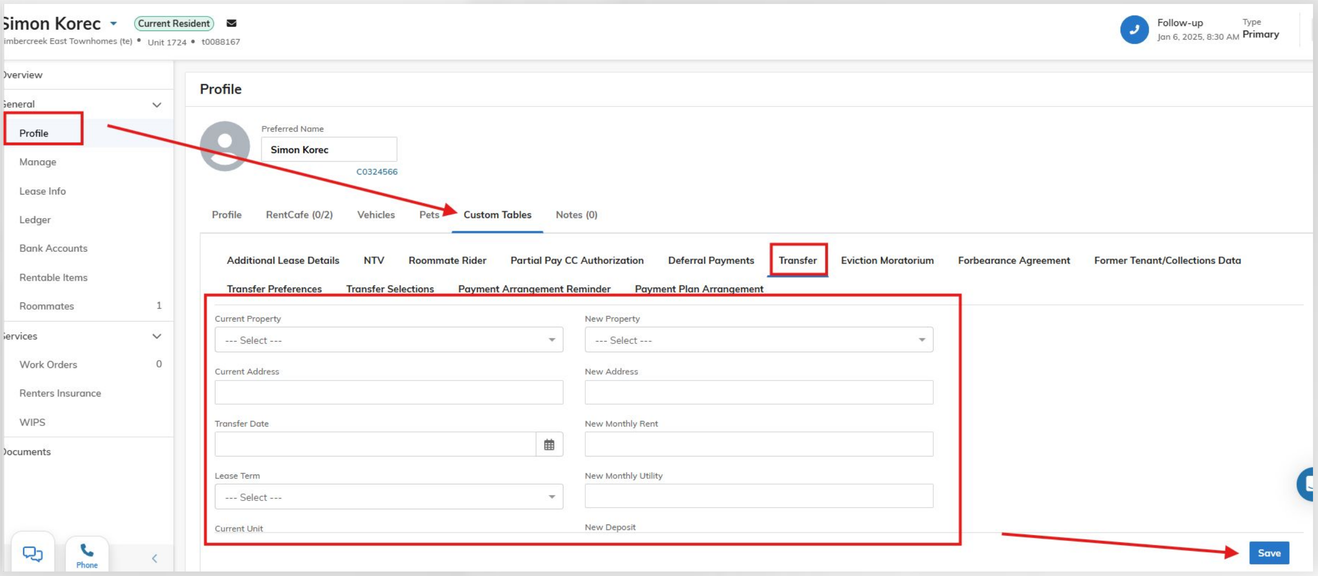
*****IMPORTANT NOTE: The only time the Unit Transfer function will be necessary is if ALL of the residents in one unit are ALL transferring to the new unit on the same property. If some residents are leaving or new residents being added, the Unit Transfer function will not be used. All remaining or new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

Typically the unit transfer procedure flows in the following order :

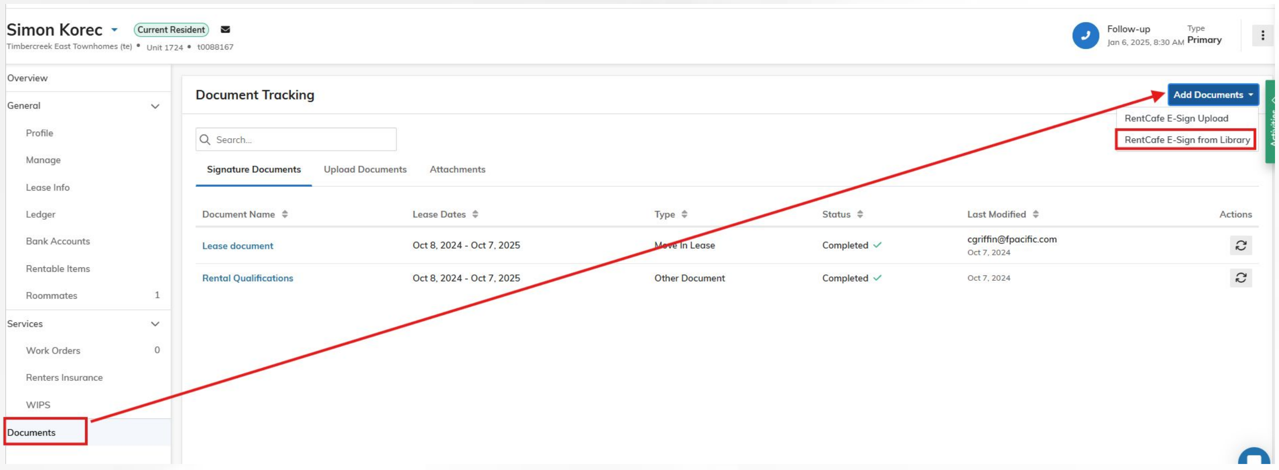
1. The resident submits a transfer notice to the leasing office.
2. You help the resident determine which unit they will transfer to.
3. You prepare the paperwork for the transfer.
4. You enter the transfer details into CRM following the unit transfer process
    - CRM updates the current resident account to a Notice status
    - CRM also creates a new resident account with a new tCode with the status of Future
5. When you give the resident keys to the 'new' unit, you will process the Move In function.
6. When the resident gives you keys to their 'old' unit, you will complete the Move Out function.
7. Process Deposit Accounting for the 'old' unit that the resident moved out of. The balance of the 'old' account will automatically transfer to the new account.
8. Confirm that the ledgers are accurate for both the old unit and the new one.

Unit Transfer

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

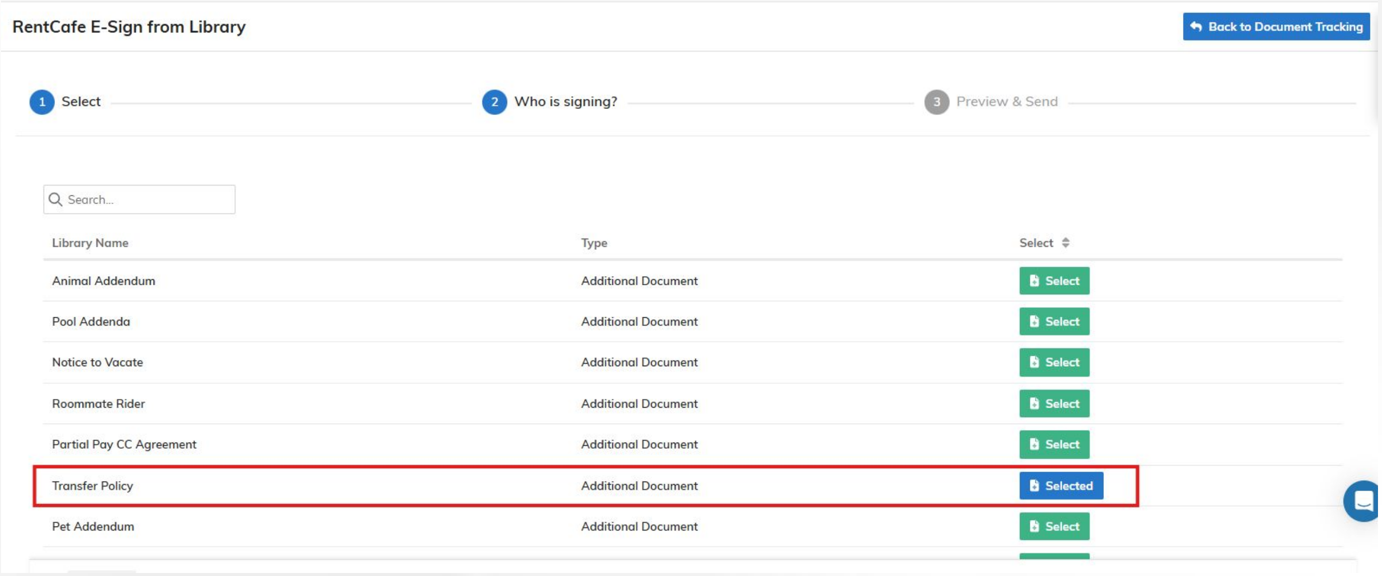


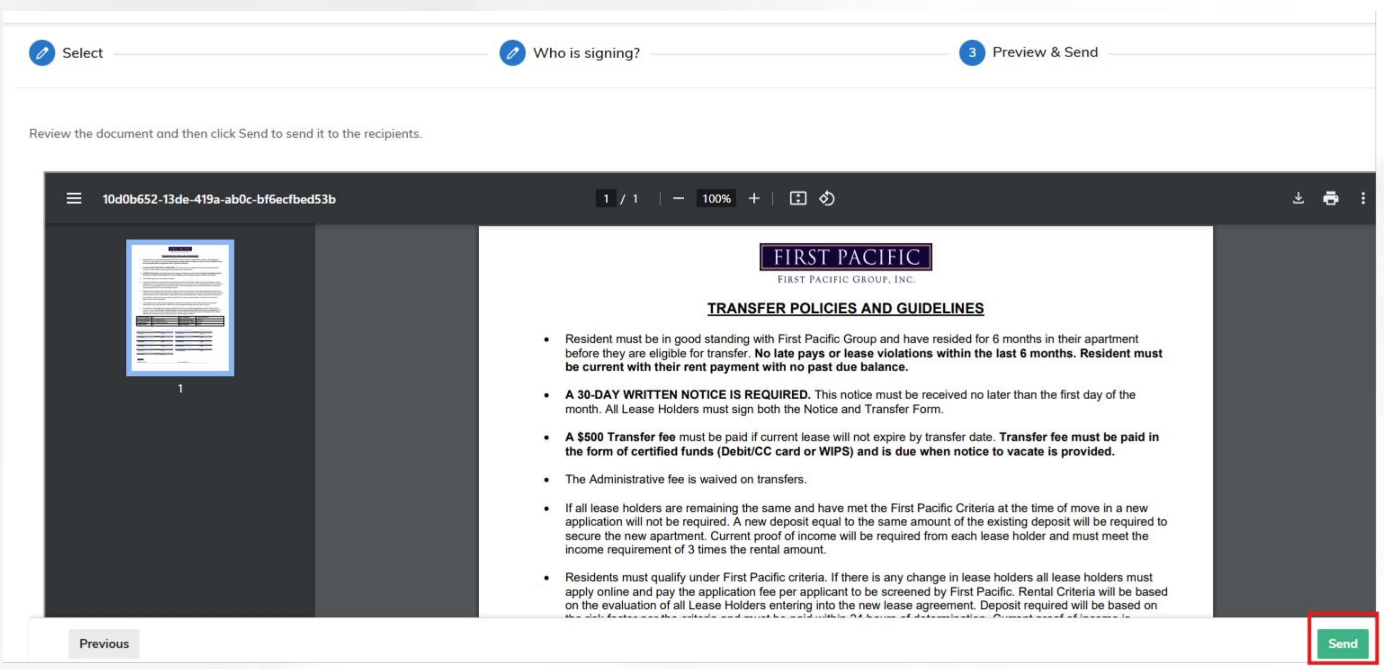
After clicking save the resident will need to sign the form via their RentCafe portal. To send it locate Documents → Add Document→ RentCafe E-Sign from Library.



Unit Transfer

Select the document, Select who is signing, and Preview and send the document. Review thoroughly and hit send.

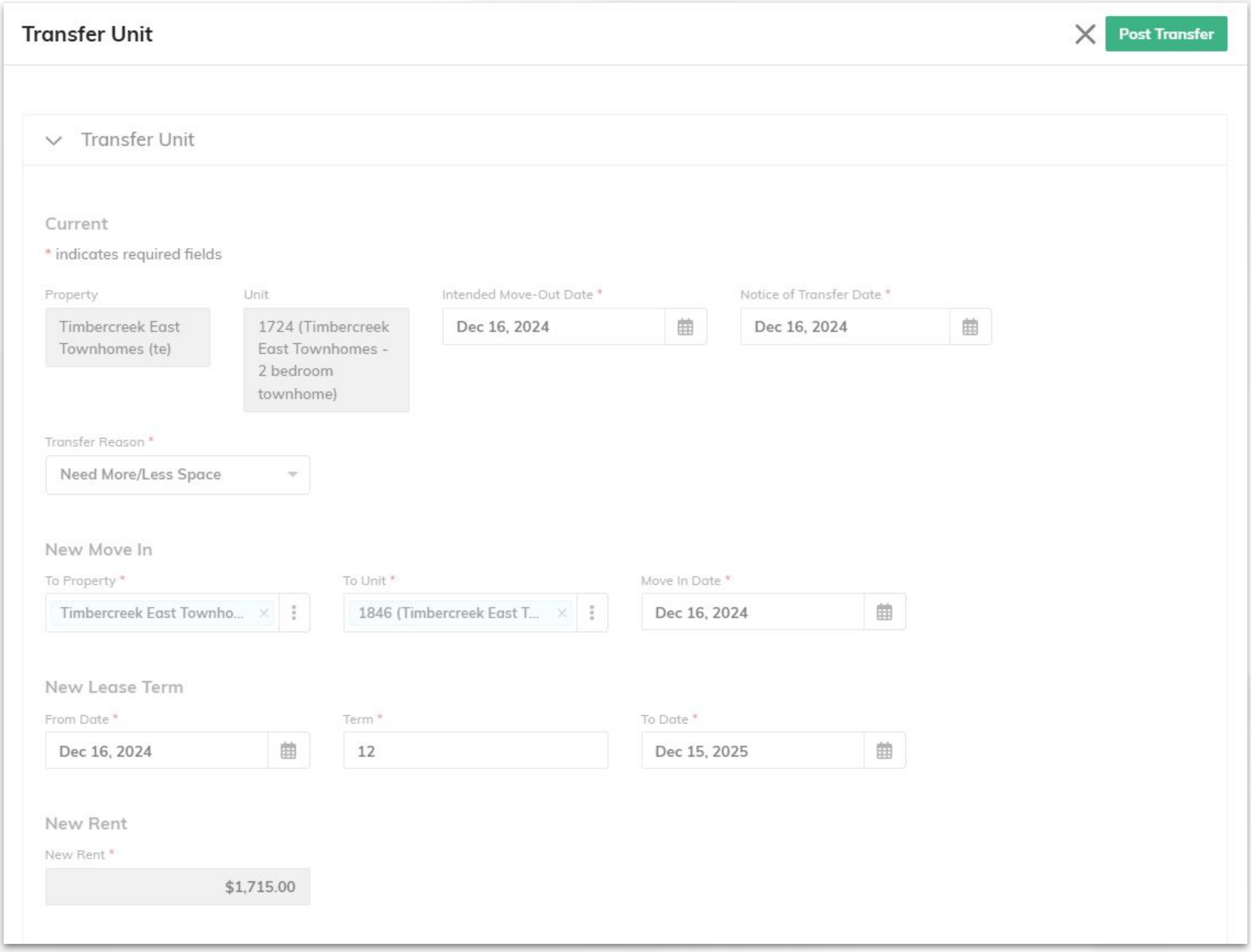




Once signed and countersigned you can now process the transfer.

Unit Transfer

The info will display as a preview and confirm that you want to Post the Transfer.



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 <u>CHARGE</u> 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

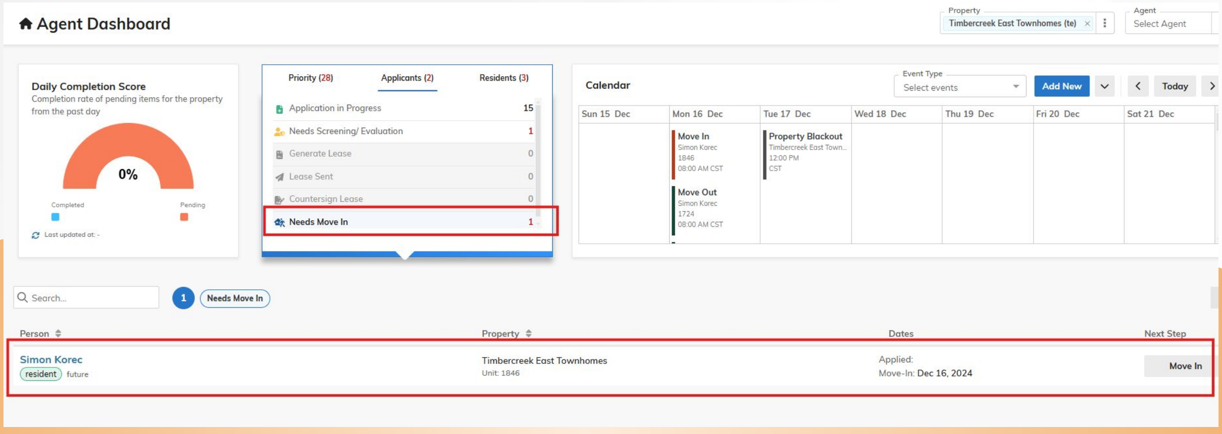
If you do not finish processing a transfer at one time, you can review the transfer and resume processing it. For example, a resident might submit a transfer notice but still needs to decide whether they want to keep their existing rentable items or reserve new ones. First, you would add the transfer 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.

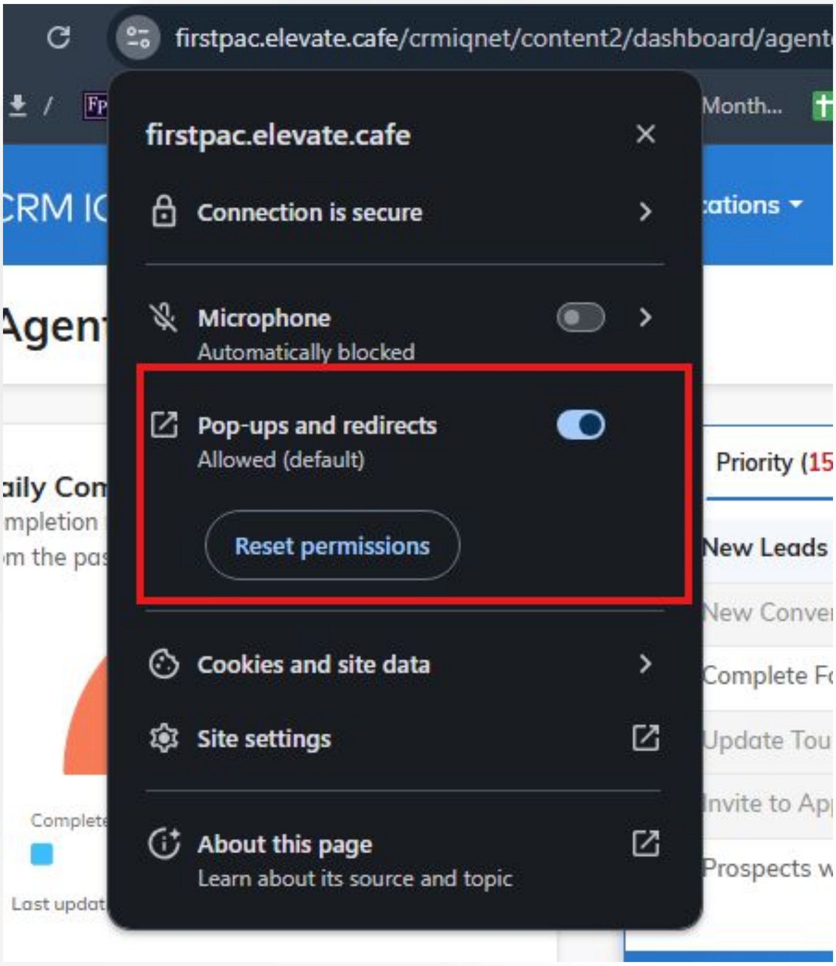
To Review, Edit or Cancel an unposted transfer, you will navigate to the residents account in Manage to edit any information. From here you can Adjust Move in Date, Move In New Unit, Cancel Move In, Move Out or Cancel Notice.

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

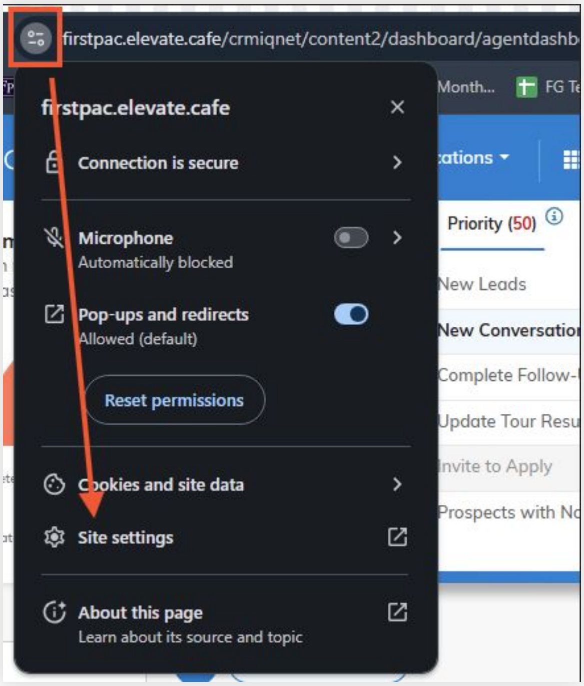


CRM IQ Pop ups

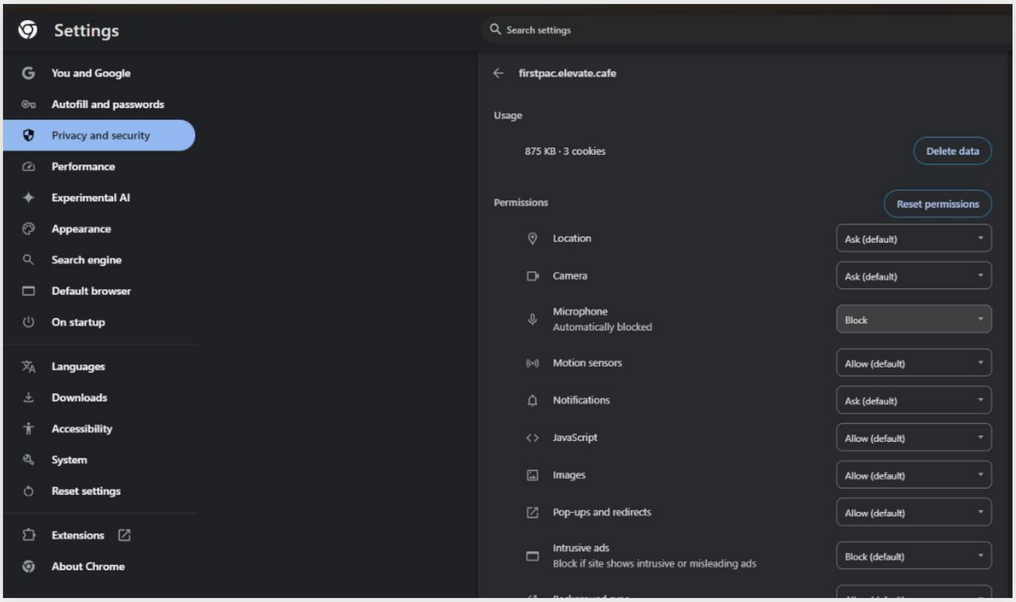
Make sure to click Allow anytime a pop up notification pops up. This will allow you to receive phone calls, texts, see info for updates, etc.



CRM IQ
Screening Pop Up



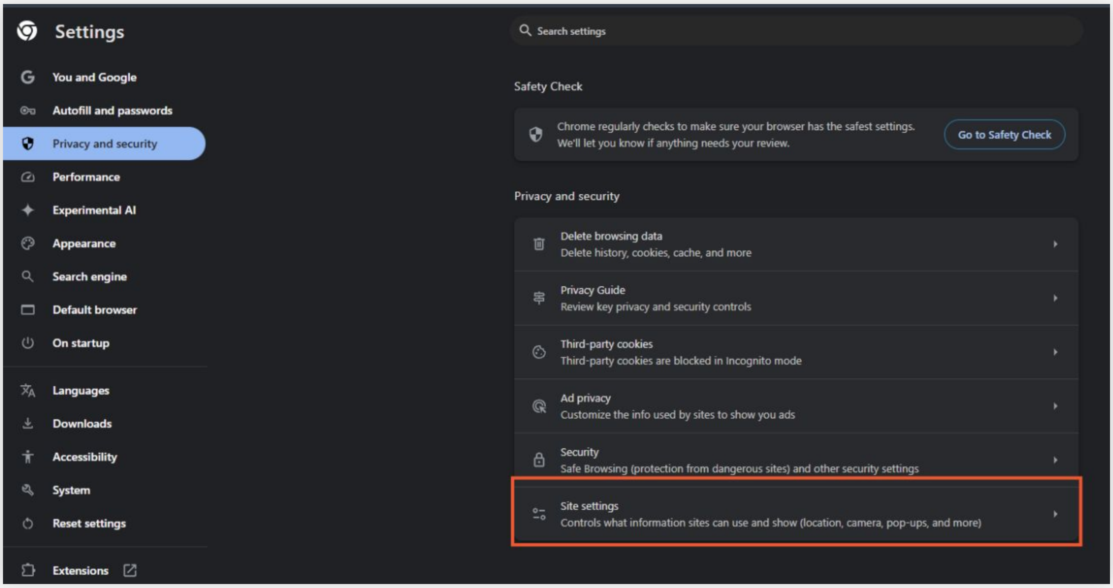
Click View Site Information icons in the top left-hand corner of the search bar and then click site settings

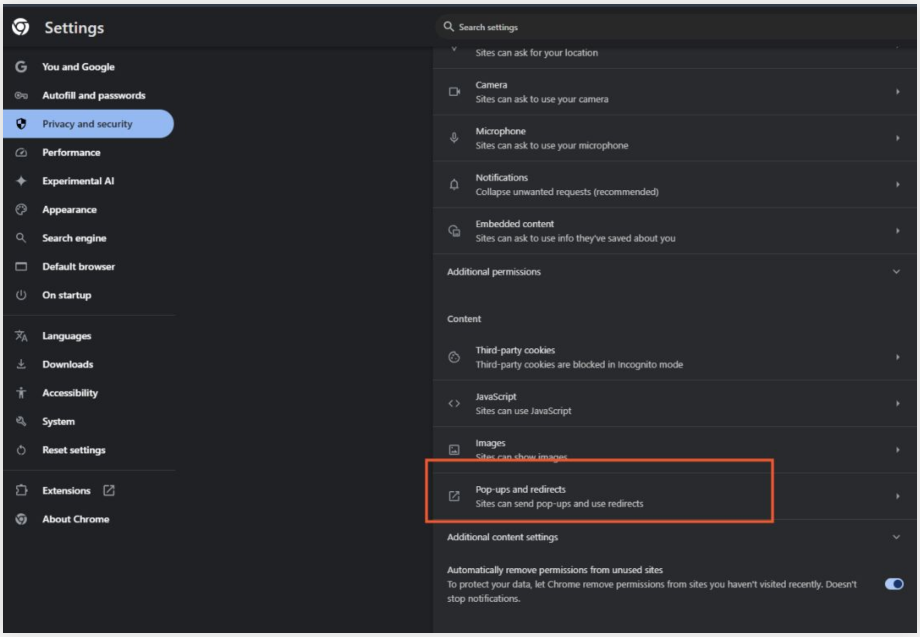


Although it says its on Privacy and security click it again.

CRM IQ
Screening Pop Up

It should look like this and then click Site Settings

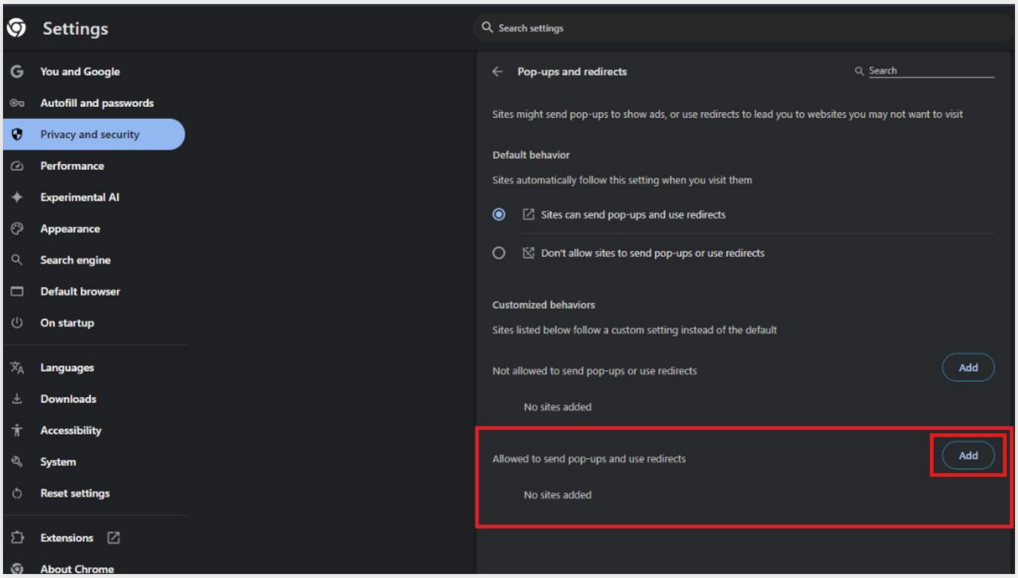




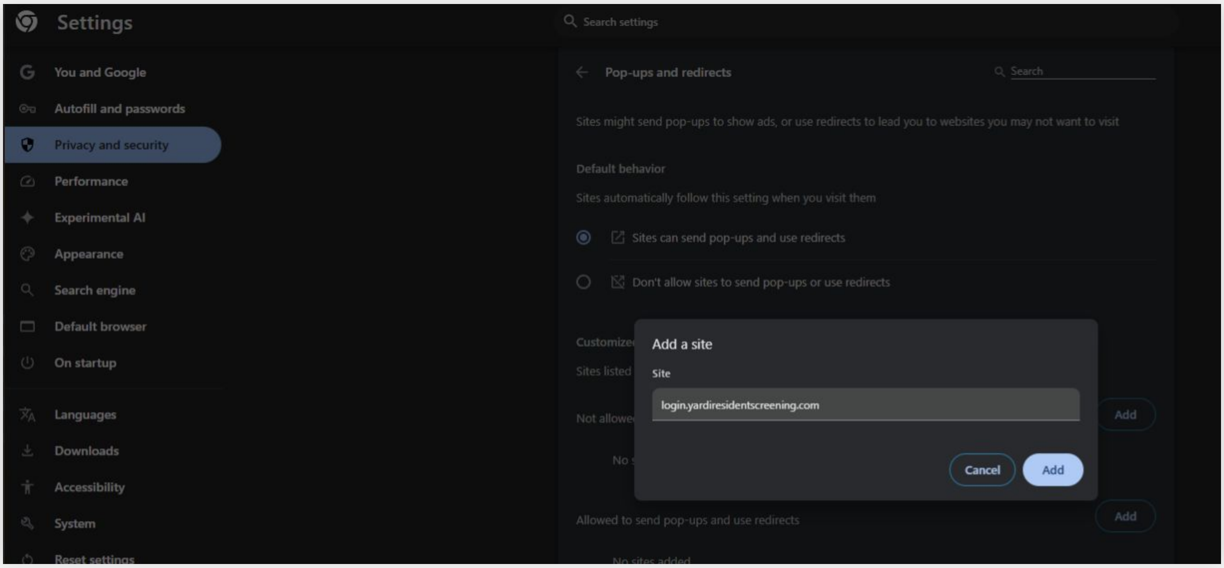
Scroll down to Pop-ups and redirects

CRM IQ
Screening Pop Up

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



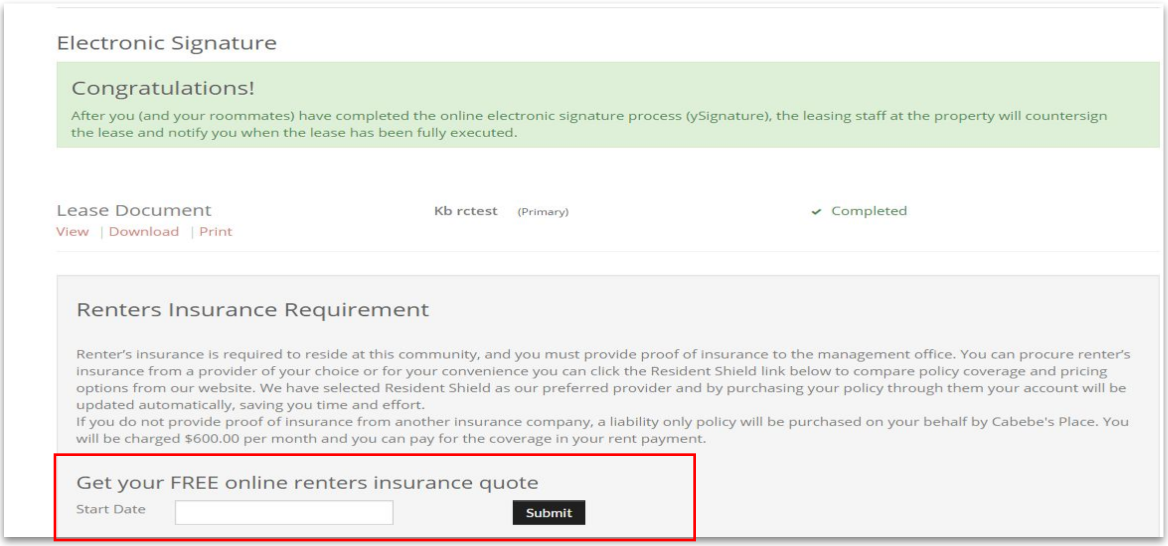
Paste this link into the box and click add. Link: login.yardiresidentscreening.com



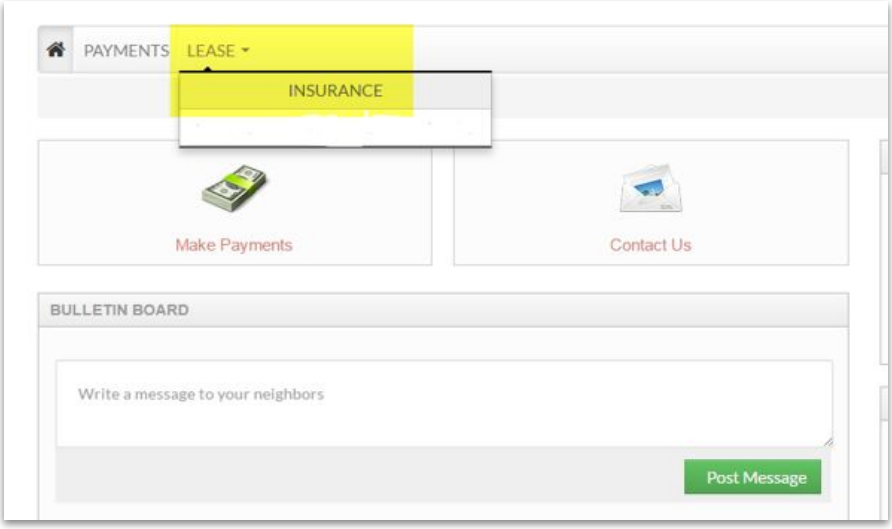
Once done exit out of it and you'll be able to review the screening.

Resident Shield Renters Insurance

Resident Shield Renters Insurance is an option set up through Yardi for the all properties but only MO, SC, and SS are required to have renter's insurance it at this time. If your property requires renters insurance it must be entered prior to posting the move-in. If not added it will not let you post the move-in. If not required residents can add on their portal after being moved in.

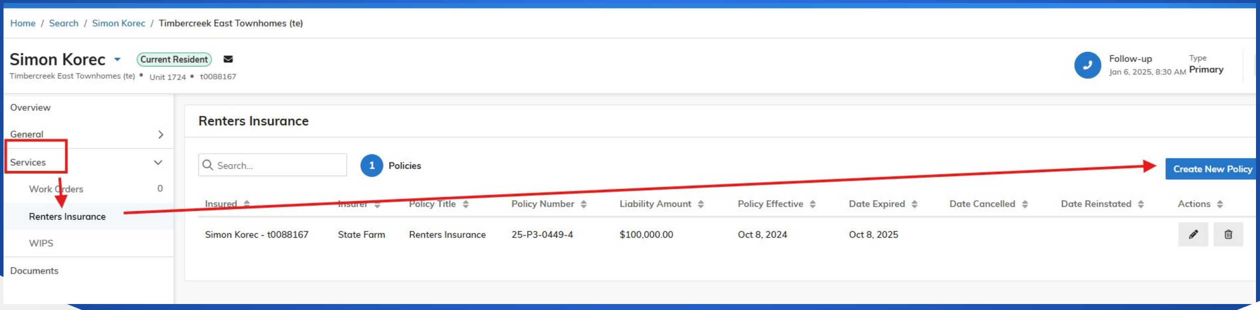


If they have a 3rd party policy (and AFTER the lease has been countersigned), they can log into RentCafé – Resident Portal and then upload an image of their Insurance policy.

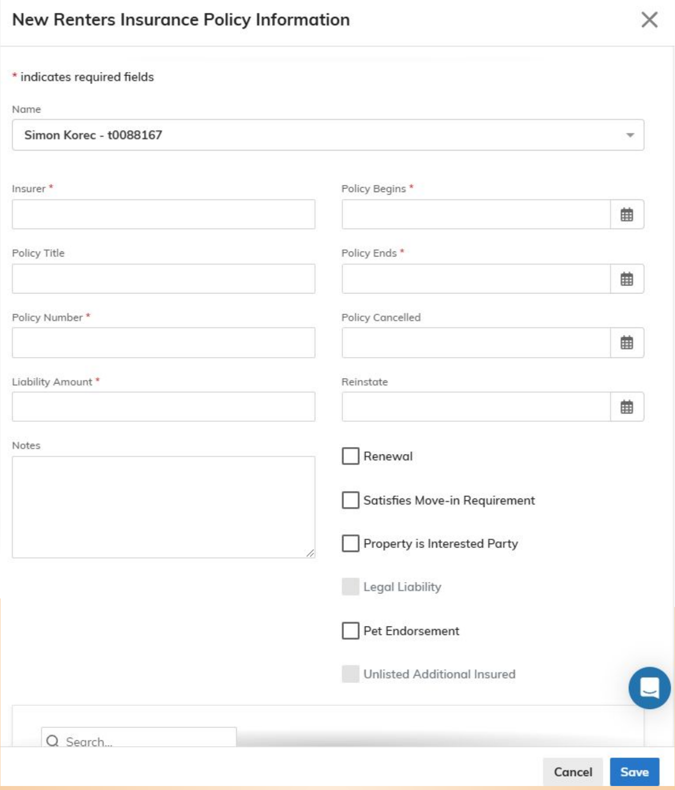


Resident Shield Renters Insurance

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.



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

CRM IQ

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

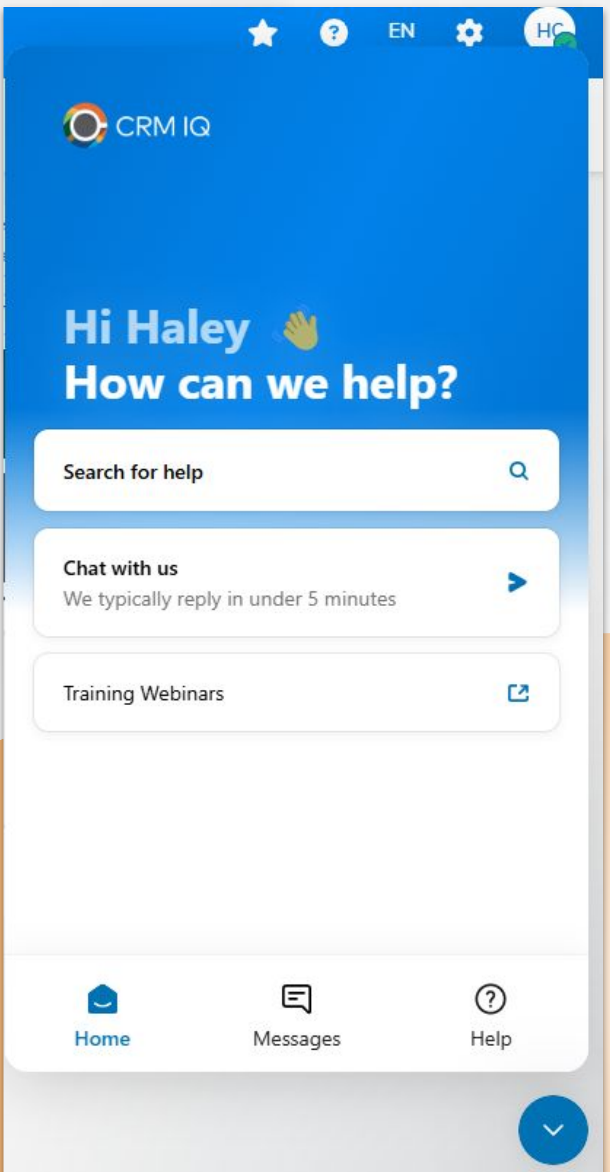
- **Unit #:** (Must be exactly as it is searched in Yardi. Do not add extra dashes or leave off building numbers. Ex: AR 39122A is not 3912-2A and EB 01-2750S is not 2750S)
- **Primary Resident / Prospect Name:**
- **Prospect / Resident Status:** (Guest, Applied, Approved, Future, Current, Notice, Past)
- **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)

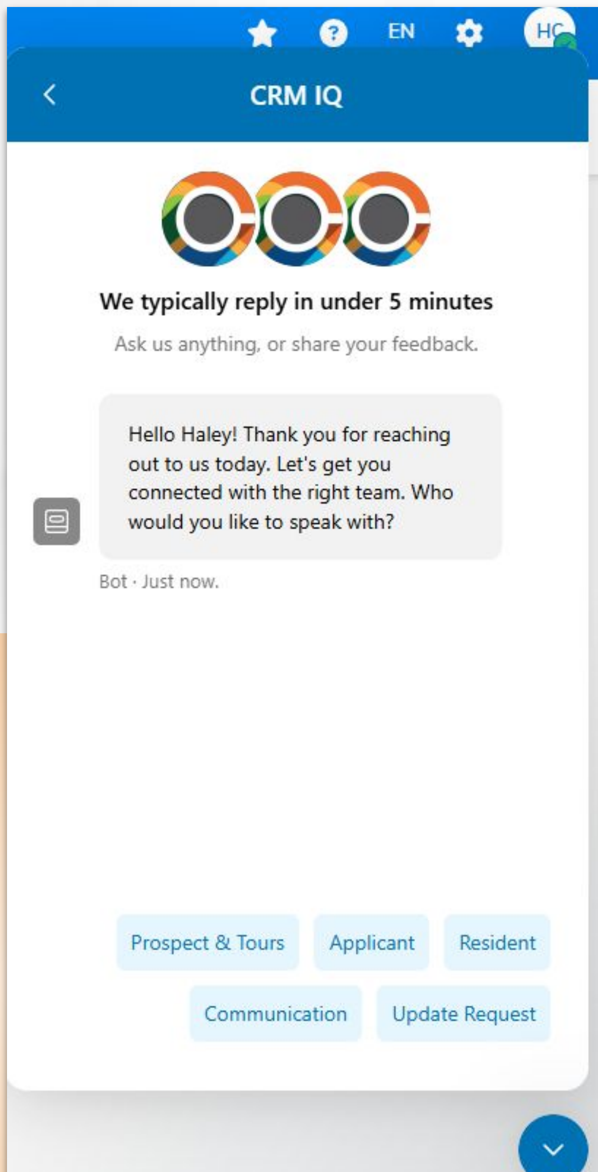
CRM IQ

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.

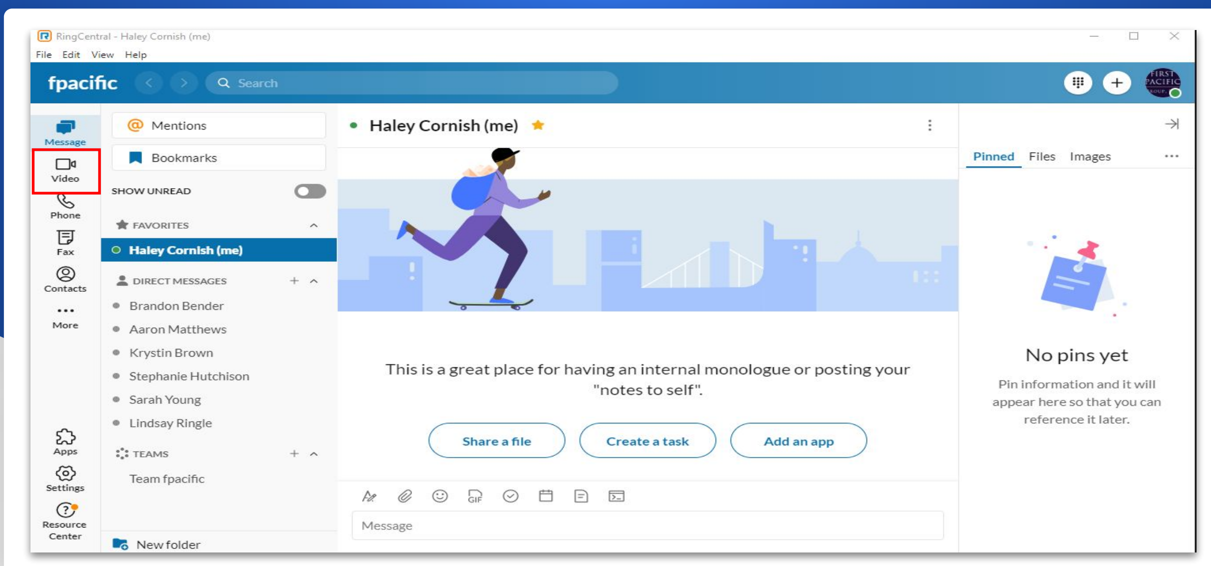




CRM IQ

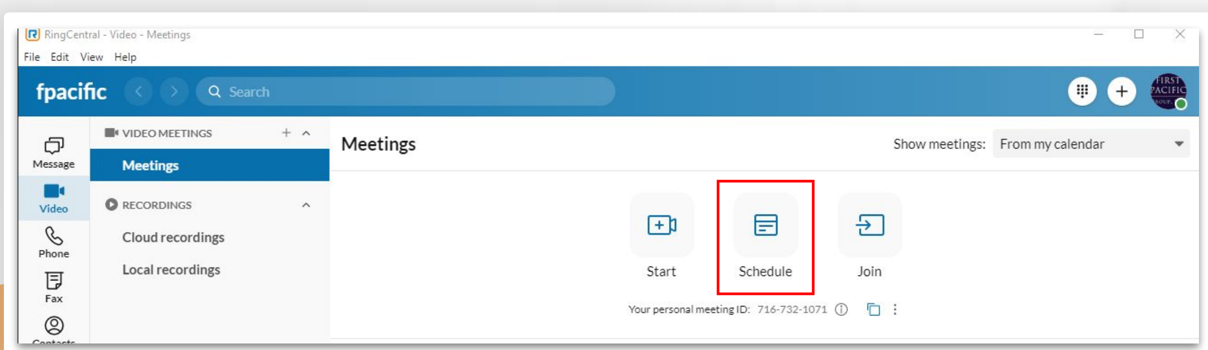
Ring Central

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

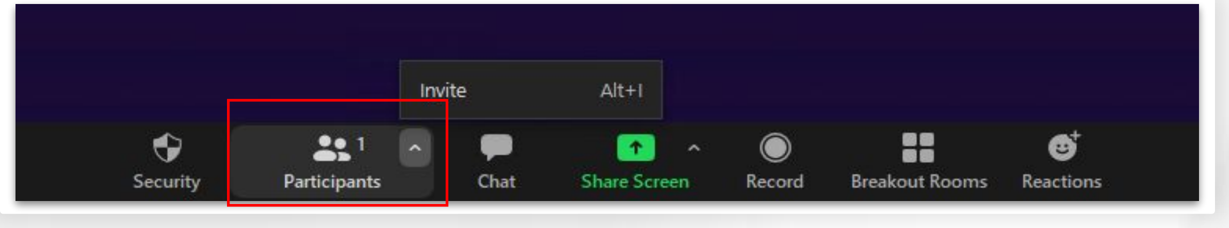
Once your meeting begins your screen will appear like this.

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

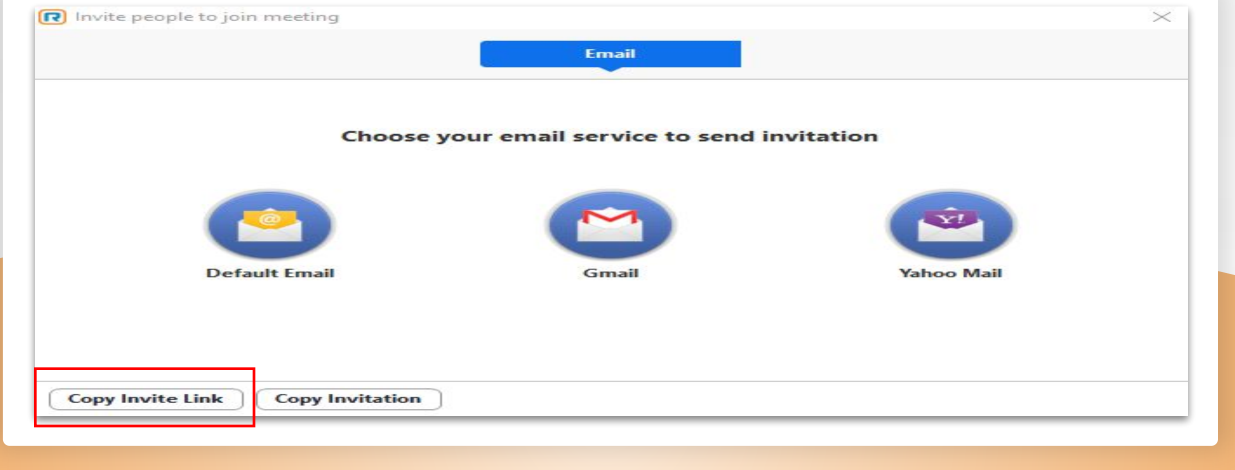
Ring Central

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.

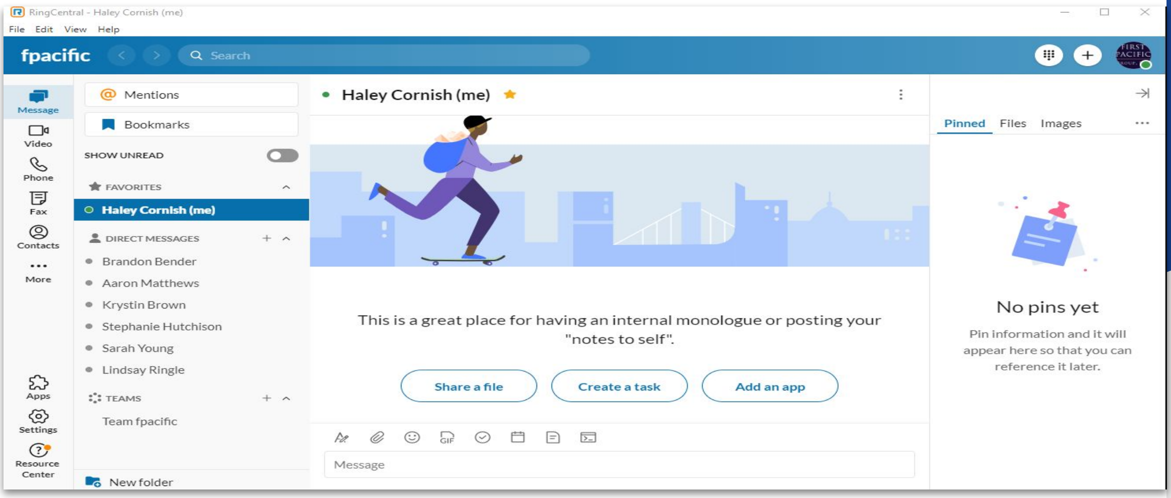


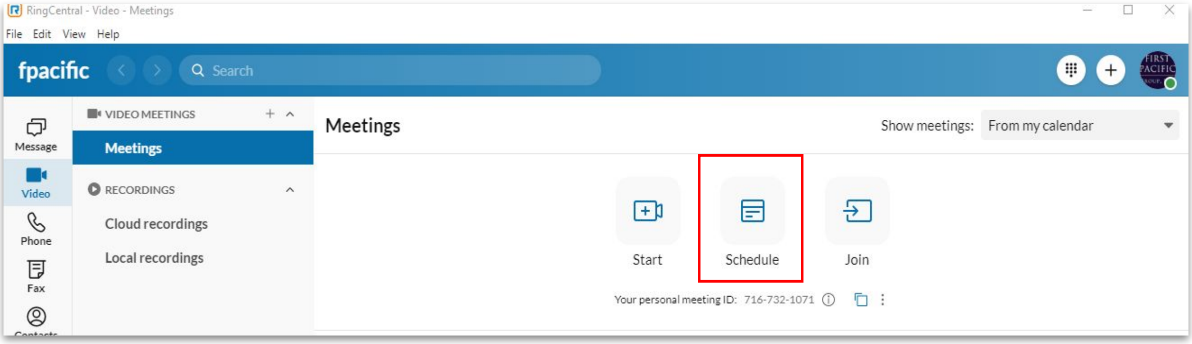
A new screen will populate then click Copy Invite Link and paste it in your email to send.



Ring Central

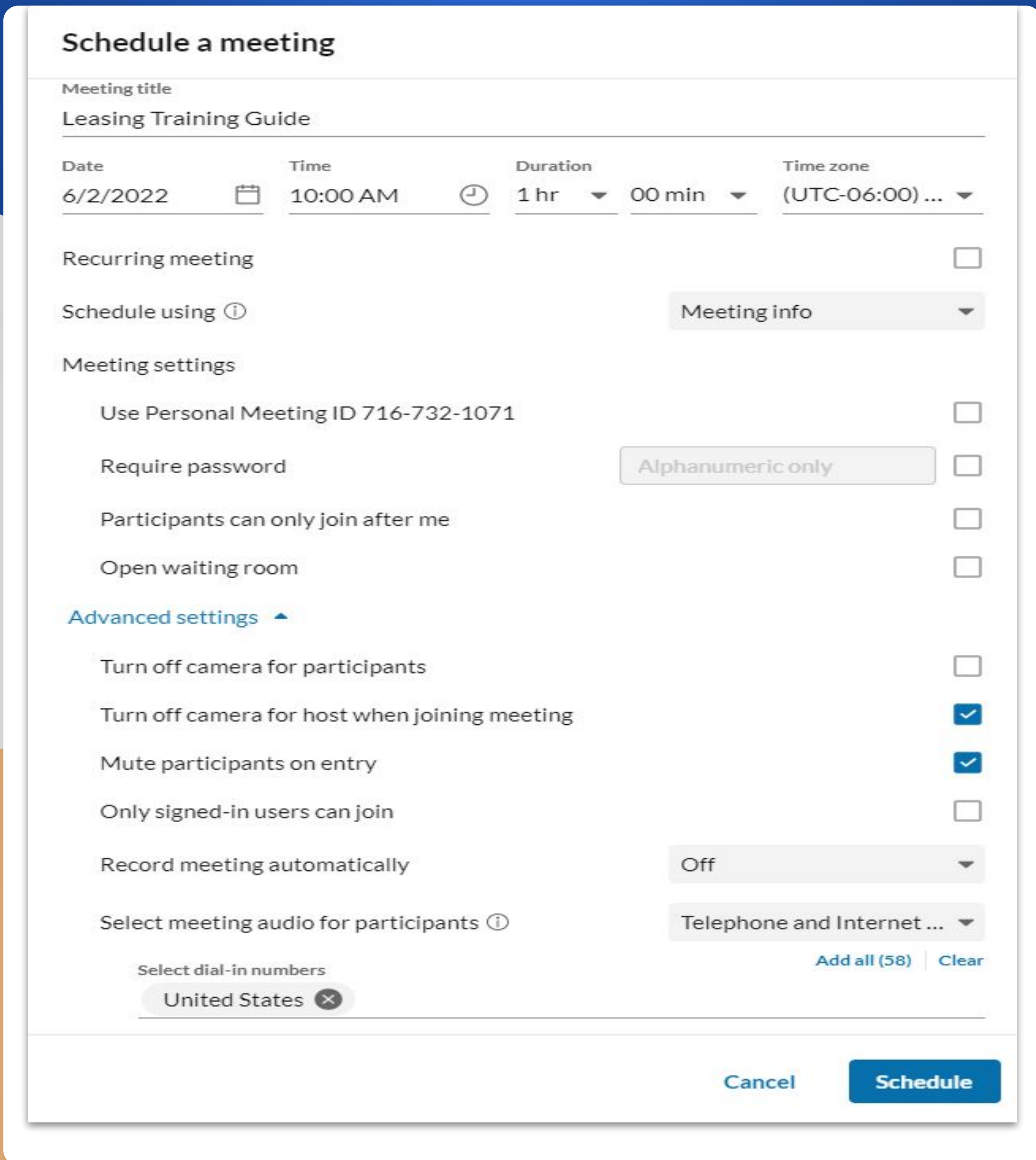
To schedule a meeting, you'll click video then schedule.





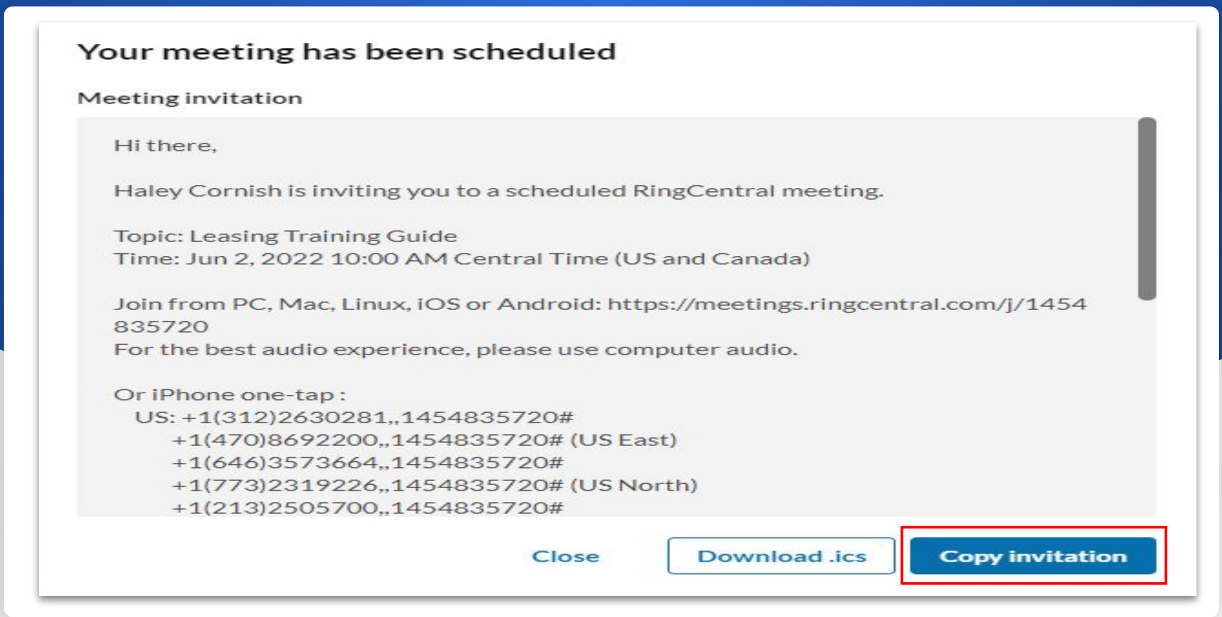
Ring Central

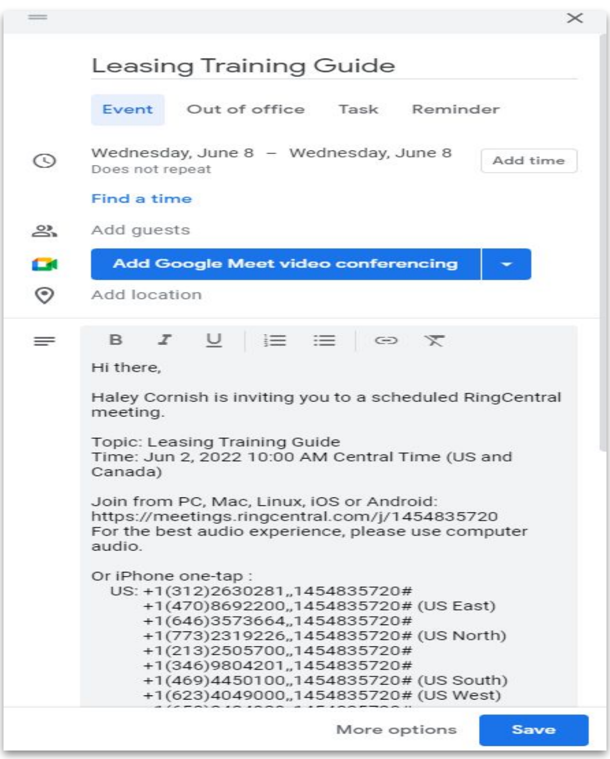
Name your meeting then select the date, time and duration. Make sure all the boxes make the screenshot below then click schedule.



Ring Central

A new screen will populate then you'll click Copy Invitation.





You then go to your Google Calendar click the date your meeting is scheduled for and create an event for it. Add the time and guest. Once you click save it will send the invite to all guest with the meeting info.

Google Drive How-To's

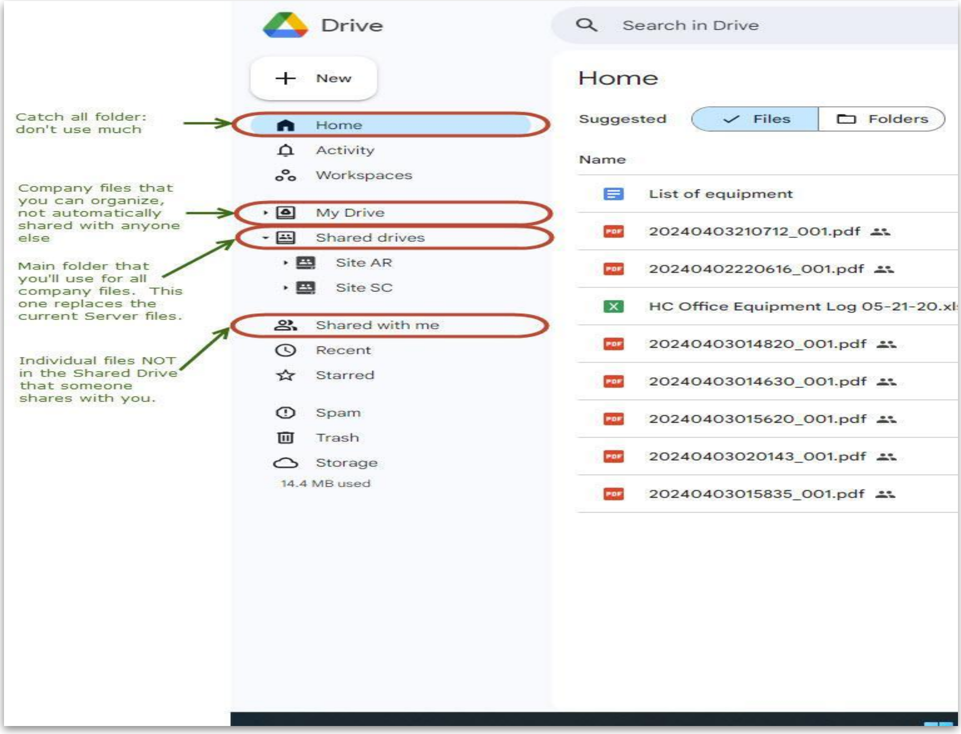
Google Drive Folders

-Home shows you files that Drive thinks you'll want to use. This is based on various criteria like when you edit them, open them, uploaded them, when they were shared with you, or documents attached to upcoming Calendar events. You can generally ignore this folder.

-My Drive contains files and folders that you created outside of the Shared drive and you control access to. You are able to share access and permissions to these files and only the files you share from your My Drive will be accessible to others. To share files located in My Drive, right click on the file…

-Shared Drive is the primary folder in Google Drive that First Pacific uses to store and collaborate on files. Unlike in My Drive, Shared Drive and its contents are managed by the company, though employees have access to their property's files. Permission for these files include view only or write permissions. Within a single folder you may only have view access for a top level folder but then have write access as you drill down the folder hierarchy. Please notify your manager if you're unable to access a file you believe you should have access to. Once you are a member of a Shared Drive, the drive will appear below your "My Drive" and above "Shared with me" in your Google Drive in the sidebar.

-Shared with me is very different from Shared Drive. Shared with me generally are files that you only have access to because an individual shared them with you. The owner of those files has full control and can revoke access at any point. When someone shares a file from their "My Drive", it goes into the "Shared with me" section for whoever they are sharing with. You can create a shortcut of a file in Shared with me and move the shortcut to your My Drive or just leave it in Shared with me. Files in your Shared Drive will NOT also show up Shared with me.



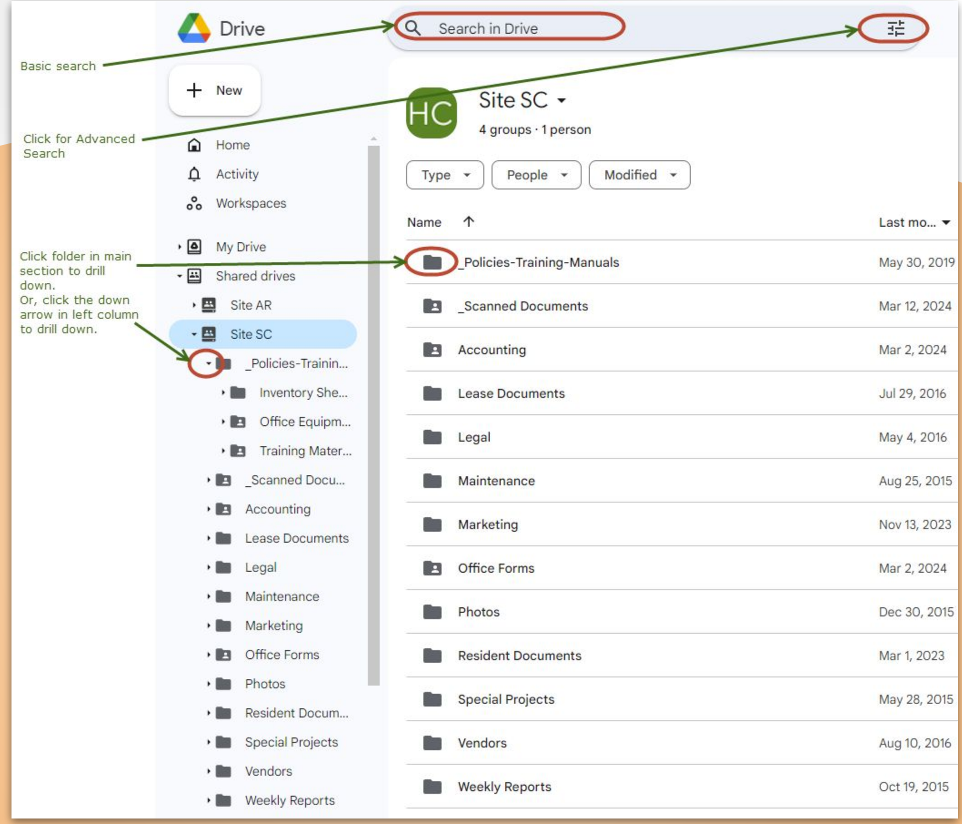
Google Drive File Collaboration /

Google Drive File Collaboration

•All file changes are automatically saved in real time so no need to save as you go. However, when editing PDF files (in the Web version) you need to click "save".
•Permissions for a file can be edit, comment, or view so you can do certain things based on your permission.
•With Google Drive, version control isn't a problem. Generally, no more need for saving multiple versions of a file, except when doing so for specific reasons.
•Collaborating on a file now is a breeze. All of your coworkers can work on the same document, at the same time. You can always see in the upper right corner if someone else is working on the file.

Finding Files

•Google is known for its search engine so the easiest way to find a file is just to type the name of the file in the search bar, or any word in the name. If you want a more refined search, click the Advanced Search icon on the right side of the search bar. This lets you search within a specific folder or using other specific criteria.
•Or, you can search manually by clicking through the folder hierarchy. You can see the folder structure in the left panel and in the main body.
•You can see the full breadcrumb list on the left by clicking the down arrows or double clicking the folder name to expand/collapse each folder. Note that individual files never show on the left panel, only in the main body.
•The breadcrumb list at the top of the main body only shows 2 or 3 folders so you need to click the horizontal ellipses to see the full path.



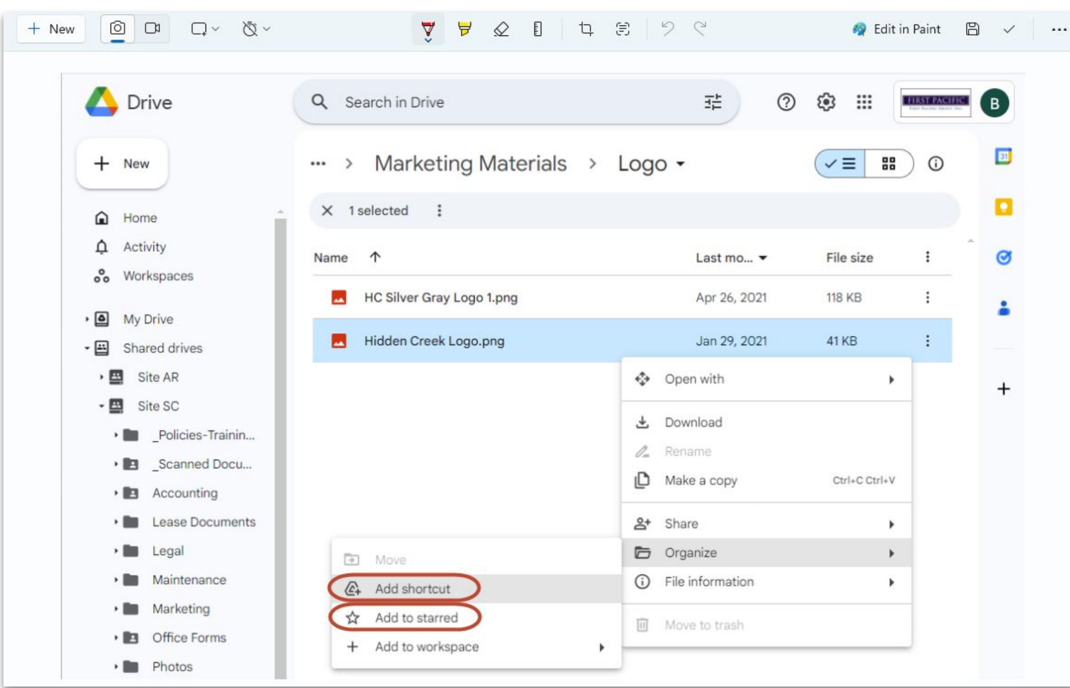
Organizing Shared Drive Files for easier access

Organizing Shared Drive files for easier access

•You cannot move a file or folder out of Shared Drive into My Drive so to put something into another location outside of Shared Drive you need to create a shortcut to the original file. Right click on a file, select organize, select add shortcut, then select where you want the shortcut to go. Importantly, if you delete a shortcut it does NOT delete the original file. Also, you'll get a message that moving a file from one folder to another will lose the original permissioning and take on the permissioning of the destination folder.

•Starred: Helpful for starring favorite files/folders for easier access. You can't create your own folder structure like in My Drive so this is just a flat list of favorites. This simply saves a link to the original file itself. To remove an item from your starred list, right click the item, click organize, then click remove from starred. This only removes it from your starred list, it doesn't delete the original file.

•My Drive: Helpful for creating a file hierarchy for documents that are not shared with the team. For example, storing files/folders from the Shared Drive that you want easier access to. Remember that only shortcuts to Shared Drive files/folders can be placed here, not the original files/folders themselves.



Google Drive How-To's

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.

Google Drive How-To's

Email a Google Drive Document

•Create a new email in Gmail

•At the bottom of the email click the icon

•Select whether you want to send as a link or an attachment in the bottom right corner of the page

•It's recommended to first share/permission the document with the recipient in Google Drive before sending a Google Drive link.

Manage PDF's in Google Drive

•You must have an Adobe Acrobat license before being able to manage/edit PDF's in Google Drive. Contact your manager if you need a license.

•Once you have an Adobe Acrobat license, you need to connect your license to your Google Drive account by following the steps below:

- Open Google Drive and click My Drive (the one right beneath the search bar)
- Click More
- Click Connect more apps
- Click Search apps and type Adobe Acrobat
- Click Adobe Acrobat and then Install
- Click Continue and sign in with your Google account
- Scroll down and click Continue
- Click OK
- You'll know it worked when you go to any pdf in Google Drive, right click on it, click "open with", and you should see Adobe Acrobat listed as one of the options.

Google Drive How-To's

Google Drive Tips/Tricks

- All documents/spreadsheets are collaborative, meaning multiple people can work on the same document/spreadsheet at the same time.
- You can see if someone else is in the document/spreadsheet by looking for a small thumbnail image in the upper right corner of the page.
- Remember to close documents when you're done working on them to avoid having lots of documents/tabs open at the same time.
- If your internet speed seems slow and lagging, try running an internet speed test using this link: https://fiber.google.com/speedtest/.
- If you are creating a new version of a document, make sure to "create a copy" before you make any changes to the document.
- If you need assistance with anything related to Google Drive, please contact Adam at ameyers@fpacific.com or create a tech ticket.

Please contact Haley Cornish at anytime if something should be added or changed. hcornish@fpacific.com