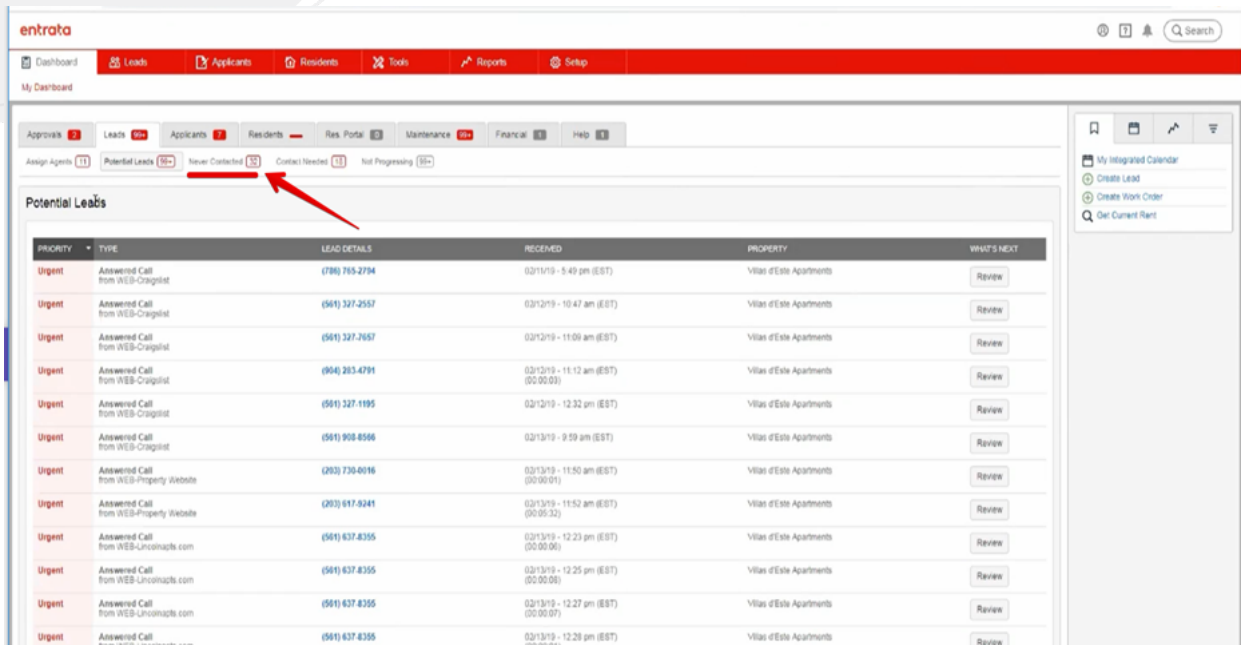


PERQ, Entrata Lead Delivery and Appointments

This document outlines the expected behavior when the Entrata API is connected with PERQ.

Step 1: Find the Lead

When Entrata API is connected appropriately, we expect that our leads populate into the "Never Contacted" or even the "Contact Needed" area in the "Leads" section of Entrata. The Guest Card is auto created by Entrata.



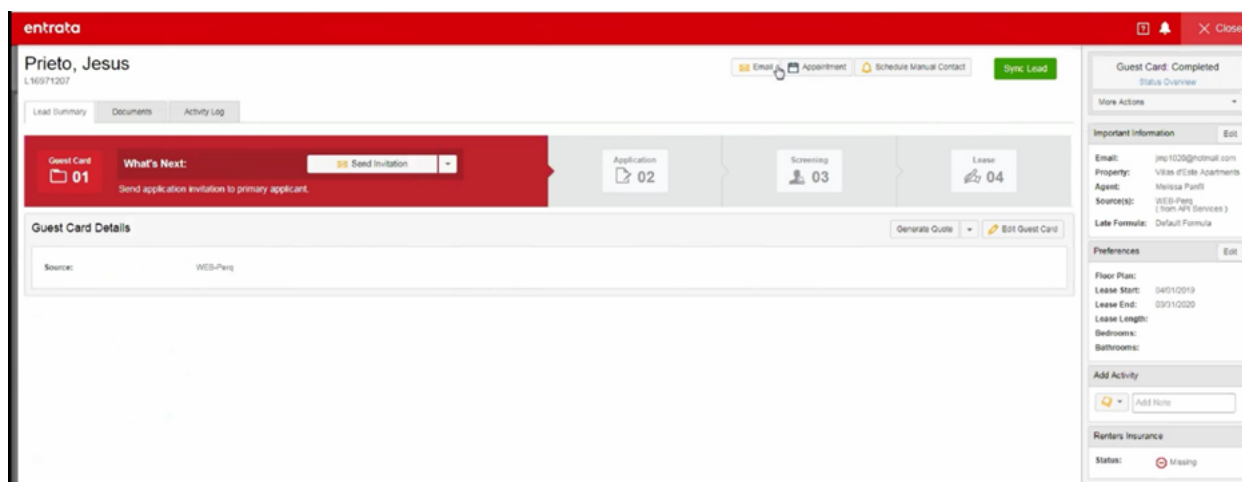
The screenshot shows the Entrata interface with the 'Leads' section selected. The 'Potential Leads' subsection is active, and a red arrow points to the 'Never Contacted' tab. The table below lists several potential leads.

| PRIORITY | TYPE | LEAD DETAILS | RECEIVED | PROPERTY | WHAT'S NEXT |
|----------|---|----------------|--------------------------------------|----------------------------|-------------|
| Urgent | Answered Call from WEB-Craigslat | (786) 755-2794 | 02/13/19 - 5:49 pm (EST) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Craigslat | (561) 327-2557 | 02/12/19 - 10:47 am (EST) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Craigslat | (561) 327-2657 | 02/12/19 - 11:06 am (EST) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Craigslat | (954) 263-4791 | 02/12/19 - 11:12 am (EST) (00:00:00) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Craigslat | (561) 327-1195 | 02/12/19 - 12:32 pm (EST) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Craigslat | (561) 908-8568 | 02/13/19 - 9:59 am (EST) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Property Website | (952) 736-6016 | 02/13/19 - 11:50 am (EST) (00:00:00) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Property Website | (203) 617-6241 | 02/13/19 - 11:52 am (EST) (00:00:00) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Uniship.com | (561) 637-8355 | 02/13/19 - 12:23 pm (EST) (00:00:00) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Uniship.com | (561) 637-8355 | 02/13/19 - 12:25 pm (EST) (00:00:00) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Uniship.com | (561) 637-8355 | 02/13/19 - 12:27 pm (EST) (00:00:00) | Villas d'Estate Apartments | Review |
| Urgent | Answered Call from WEB-Uniship.com | (561) 637-8355 | 02/13/19 - 12:28 pm (EST) (00:00:00) | Villas d'Estate Apartments | Review |

When things are not setup correctly, our leads end up in the "Potential Leads" subsection of the "Leads" area and are typically our Internal Leads. When leads are in the "Potential Leads" subsection, the client has to manually "Create Lead" from the email.

Step 2: Open the Guest Card

This is a view of a correctly created Guest Card.



The screenshot shows the Entrata interface with the 'Guest Card' view for 'Prieto, Jesus'. The card is completed and shows the following details:

- Guest Card:** 01
- What's Next:** Send application invitation to primary applicant.
- Application:** 02
- Screening:** 03
- Lease:** 04
- Source:** WEB-Pero
- Guest Card Details:** Generate Quote, Edit Guest Card
- Important Information:** Email: jesus102@gmail.com, Property: Villas d'Estate Apartments, Agent: Melissa Pardo, Source(s): WEB-Pero (Non-API Services), Lease Formula: Default Formula
- Preferences:** Floor Plan, Lease Start: 04/01/2019, Lease End: 03/31/2020, Lease Length, Bedrooms, Bathrooms
- Add Activity:** Add Note
- Renter's Insurance:** Status: Missing

Step 2: The Guest Card (cont.)

entrata

Granatoor, Richard
L16707764

Urgent Manual Contact: Last Contacted: 11/17/2018

Lead Summary | Documents | Activity Log

+ Add Activity

Filter Activities

| Activity | Date |
|---|---------------------------|
| Guest Card Status: Archived by Melissa Parfitt Reason for Archive: Archived no response and past move-in date | Dec 03, 2018 09:52 AM EST |
| Manual Contact added by Contact Points because Guest Card is submitted | Nov 16, 2018 02:10 AM EST |
| Manual Contact added by Contact Points because Guest Card is submitted (Be sure to follow up with the lead personally, answer any questions they have, and including your name at the end! The best of luck to you- New do your thing!) | Nov 17, 2018 01:17 PM EST |
| Manual Contact added by Contact Points because Email received | Nov 17, 2018 01:17 PM EST |
| Outgoing Email from villasdelte@entrata.com to Richard Granatoor Email Sender: Melissa Parfitt | Nov 17, 2018 01:17 PM EST |
| Guest card Updated by Melissa Parfitt | Nov 17, 2018 01:15 PM EST |
| Guest Card Submitted for Richard Granatoor from WEB-Perg by Melissa Parfitt | Nov 17, 2018 01:15 PM EST |
| Incoming Email from Richard Granatoor by Melissa Parfitt Result: Response Sent | Nov 17, 2018 10:42 AM EST |

Guest Card: Archived

More Actions

Important Information | Edit

Office Phone: (201) 739-7236
Email: rgranatoor@aci.com
Property: Villas d'Estate Apartments
Agent: Melissa Parfitt
Source(s): WEB-Perg (from Entrata PaaS)
Lease Type: Standard
Lease Formula: Default Formula

Preferences | Edit

Floor Plan:
Lease Start: 11/17/2018
Lease End: 11/16/2019
Lease Length: 12 Months
Bedrooms:
Bathrooms:

Add Activity

+ Add Note

Renters Insurance

Step 3: Check the Calendar for Appointments

Full Calendar

October 2020

| Su | Mo | Tu | We | Th | Fr | Sa |
|-------|----|----|----|----|----|----|
| 31 | 1 | 2 | 3 | 4 | 5 | 6 |
| EDT | | | | | | |
| 9 AM | | | | | | |
| 10 AM | | | | | | |
| 11 AM | | | | | | |
| 12 PM | | | | | | |
| 1 PM | | | | | | |
| 2 PM | | | | | | |

PERQ Kristin
Leasing Appointment
Aura at Quarterpat

PERQ Kristin
Leasing