

PERQ, Yardi with NO additional CRM - Lead Delivery and Appointments

This document contains example screenshots of a PERQ lead when the client is using the Yardi integration and no additional CRM. Please note that views in your Yardi software may vary from what is shown on this document.

Leads & Appointments

Community Manager Dashboard -

Resident Activity	Unit Statistics	Wednesday, February 26, 2020
Move In: 8	Total Units: 309	Prop/List 071
Move Out: 0	Leased Units: 86 (27.83%)	Add Guest Quick Guest
Deposit Accounting: 0	Occupied Units: 76 (24.60%)	Leasing Specials Daily Activity
On Notice: 0	Available Units: 223 (72.17%)	Hot Sheet Monitor Reports
Expiring Leases (120 days): 0	Model/Down/Admin: 0 (0%)	New PO New Svc. Req.
Scheduled Lease Renewals: 0	On Hold Units: 0 (0%)	Print Letters
Alerts: 2	Unit Transfers: 0	
Scheduled Roommate Promotions: 0		
Maintenance	Traffic	Open Batches
Pending Make Ready: 0	Prospect Pipeline: 1	Charges New Payable Batch Batch
Pending Work Requests: 0	Today's Showings: 0	Receipts New Receipt Batch
Completed WO Followup: 0	On Waitlist: 0	Payables New Payable Batch
	Pending Applications: 10	

Calendar | Dashboard | Person Search

February 2020

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
February 24	25	26 Appointment (1)	27	28	29
					March 1
2	3	4	5	6	7

This Community Manager Dashboard shows that PERQ has sent a lead into the system, as well as an appointment to the calendar.

Leads Details

This is a prospect guest card. Lead information is shown in the top section of the guest card. PERQ Experience data is populated into the notes field.

Prospect Guest Card Other Data

First Name	Kara	MI	Status	Prospect
Last Name	McIntyre		Code	p0177476
Address			Property	perq01
Address			First Contact	Other
City State Zip		58790	Agent	AgentFirst AgentLast
Country	us		Source	Source01PERQ
Tel# Office-Home			Result	PERQ01
Cell# - Fax#	(812) 564-0792		Date	11/12/2019
DOB - DL#/State				
Email	kmcintyre@perq.com			
Notes	## PERQ Notes Begin ## Zip : 58790 Pets : No			

[Next](#) [Cancel Guest](#) [Help](#)

Guest Card

Type	Date	Unit	Agent	Di
Other	11/12/2019		AgentFirst AgentLast	First
Other	03/24/2020		AgentFirst AgentLast	New Customer Welcom
Other	03/24/2020		AgentFirst AgentLast	Right Neighborhood For Me : 03-03-2020 10:07 AM Places : Grocery, Coffee
Other	03/24/2020		AgentFirst AgentLast	Ask A Question : 02-14-2020 09:18 AM Question 1 : do you havi
Other	03/24/2020		AgentFirst AgentLast	Floor Plan Match : 03-17-2020 03:32 PM Number Of Bedrooms : 2 Number Of Baths : 1 Current Price : 2000 Priority : Budget Hoi
Other	03/24/2020		AgentFirst AgentLast	Special Offer : 02-26-2020 01:26 PM Special Offer Text : About Move in Special!!!! ---- SCHEDULE A SHOWING ONLINE AT: http

By clicking on the event type links below the prospect information, you can see the PERQ data collected from a specific experience.

Yardi Systems, Inc. - Contact for aa a

yardipcv.com/8223tp7s7dev/Pages/ResProspectContact...

Contact for aa a

Type	Other
Agent	AgentFirst AgentLast
Result	
Date	06/24/2019
Time	1:18 PM
Property	perq01
Unit	
Notes	Right Neighborhood For Me : 06-24-2019 02:18 PM (EDT) Places : Fitness, Grocery, Coffee & Bakeries Activities : Pet Activities, Family Activities, Social Activities

[Save](#)

Type	Date	Unit	Agent
Other	06/24/2019		AgentFirst AgentLast