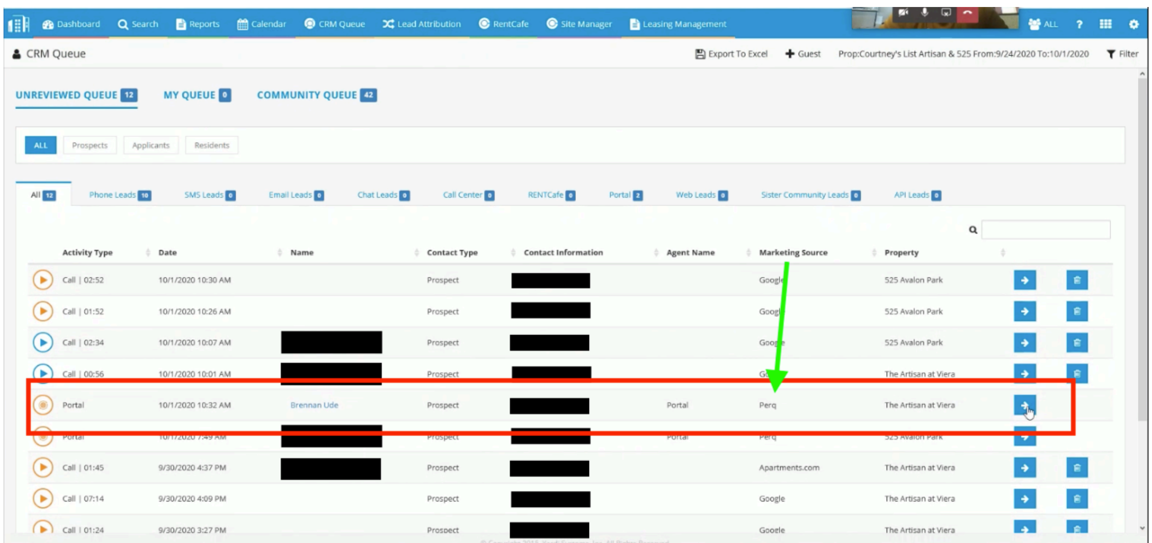
PERQ, Yardi Integration with RentCafe – Lead Delivery and Appointments

PERQ leads can be delivered directly into Yardi using our API Integration. This document outlines what a PERQ lead looks like in Yardi with Rentcafe CRM, and shows you how to access helpful prospect data collected through PERQ, including scheduled appointments. Keep in mind the specific look of your system could vary.

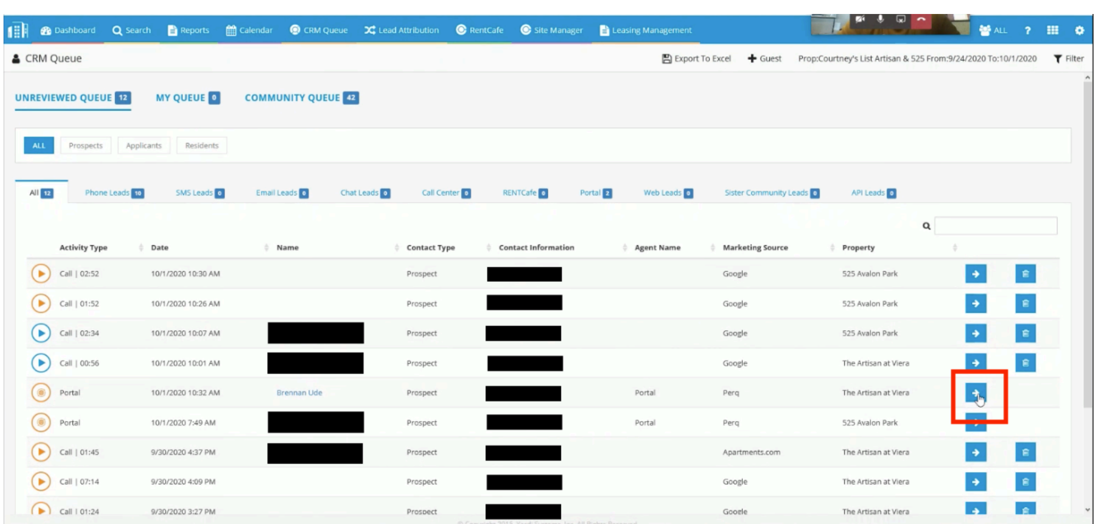
Step 1: Find the Lead

PERQ leads enter in the CRM Queue. Once you've found your CRM Queue, you'll see a list of leads. Make sure you're viewing all leads. Under the Marketing Source column, you'll look for the lead source your property uses for PERQ leads. In this example, the leads come through with the source "Perq."



Step 2: The Guest Card

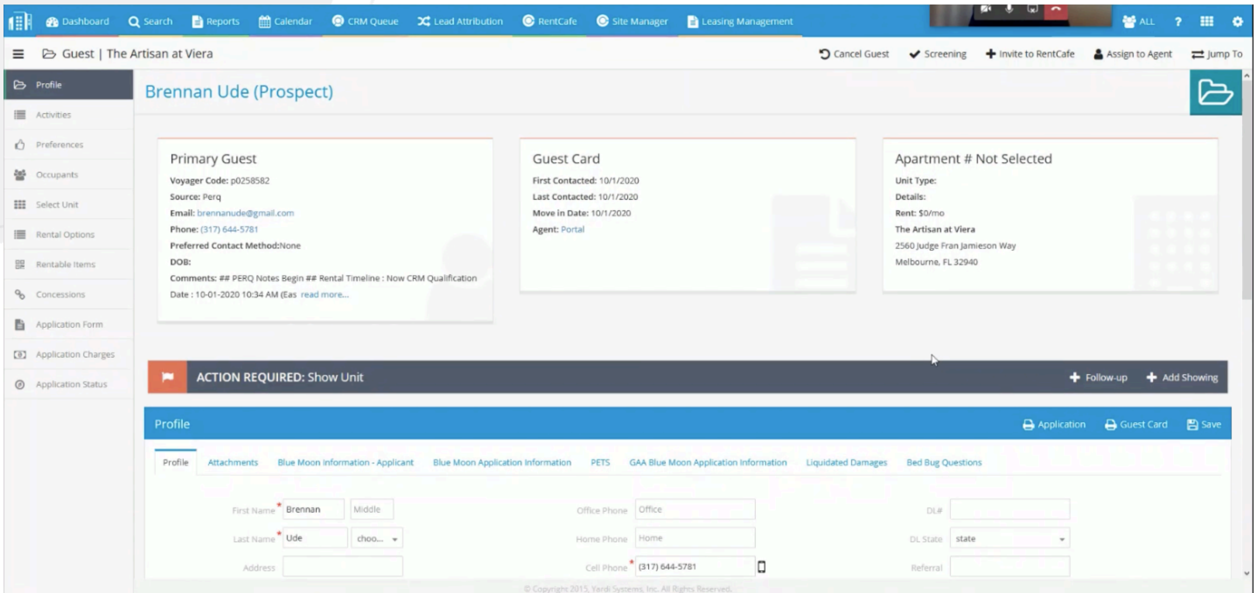
To create the guest card, you'll press the arrow on the far right.



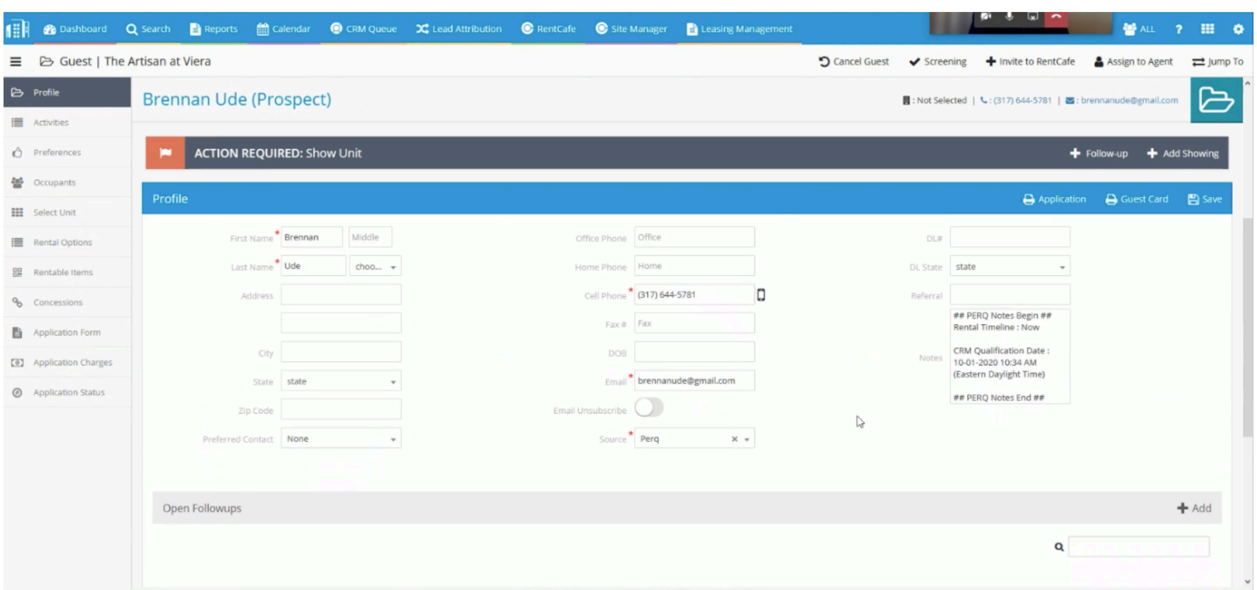
Step 2: The Guest Card (cont.)

Once the guest card is created, your lead turns into a prospect, and you'll start to see the information that was entered through PERQ.

At the top, there is a summary of high-level prospect information.



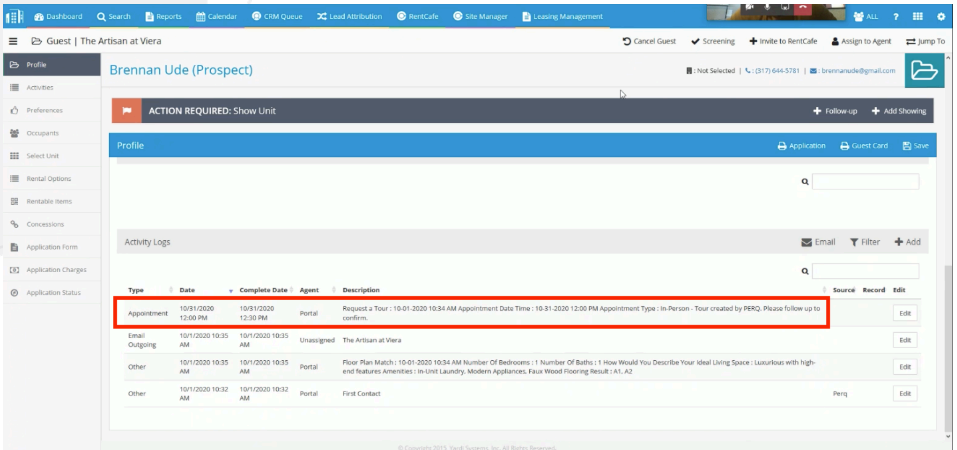
Scroll down to the next section, you'll see the profile information for the prospect.



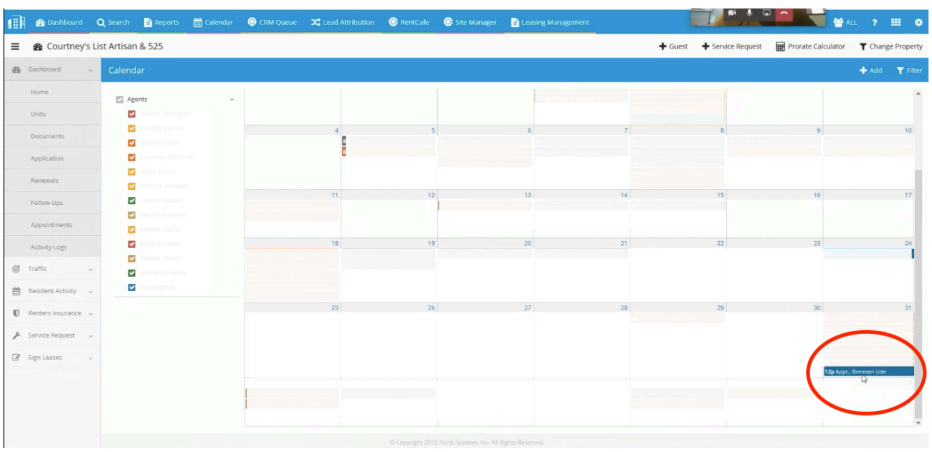
Keep scrolling for step 3…

Step 3: Check for Prospect Activity and Appointments

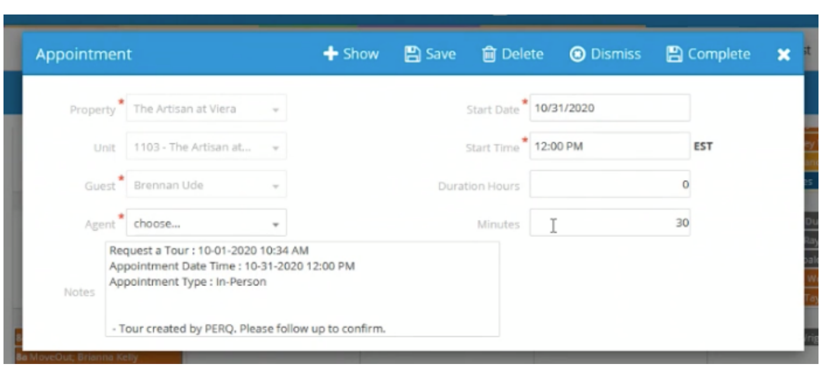
Still on the guest card, below the profile, you'll see the activity log. In the activity log, you'll see the different PERQ experiences the prospect completed on the website, as well as any appointments scheduled.



If there is an appointment scheduled, it will also show up on the calendar.



By clicking on the appointment from the calendar, you'll see the information provided about the tour. Please note that not all prospect information will show here. To prepare for a tour, it is also a good idea to search for the guest card for additional information about the prospect.



From here, you're also able to mark your completed appointments as showed.