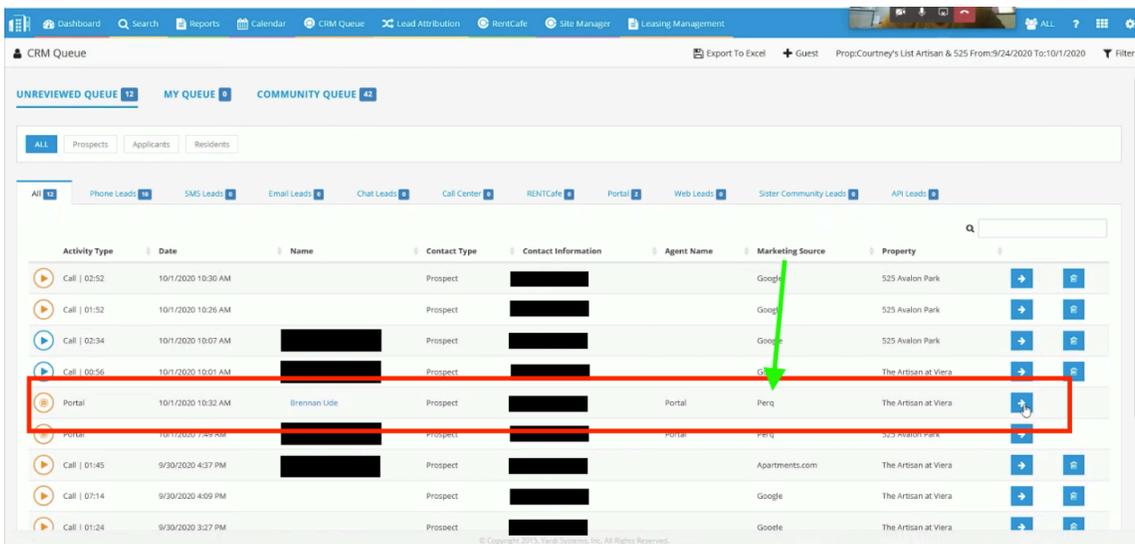


PERQ, Yardi Integration with RentCafe - Lead Delivery and Appointments

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.

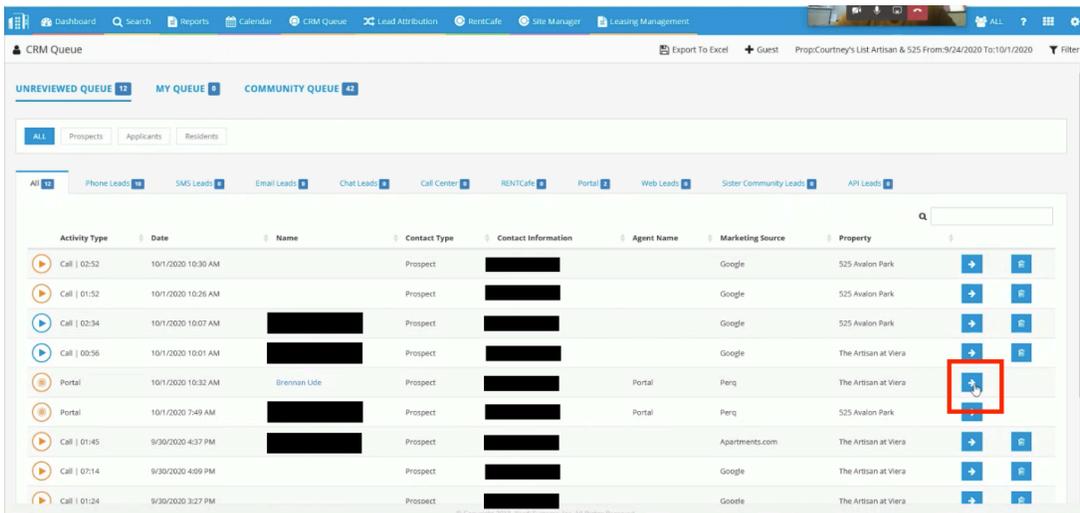
Step 1: Find the Lead

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.

The screenshot displays the 'Guest | The Artisan at Viera' interface. The main content area is titled 'Brennan Ude (Prospect)' and contains three summary cards:

- Primary Guest:** Voyager Code: p0258582, Source: Perq, Email: brennanude@gmail.com, Phone: (317) 644-5781, Preferred Contact Method: None, DOB: [Redacted], Comments: ## PERQ Notes Begin ## Rental Timeline: Now CRM Qualification Date: 10-01-2020 10:34 AM (Eas read more...)
- Guest Card:** First Contacted: 10/1/2020, Last Contacted: 10/1/2020, Move in Date: 10/1/2020, Agent: Portal
- Apartment # Not Selected:** Unit Type: [Redacted], Details: Rent: \$0/mo, The Artisan at Viera, 2560 Judge Fran Jamieson Way, Melbourne, FL 32940

Below the cards is a red banner: **ACTION REQUIRED: Show Unit** with '+ Follow up' and '+ Add Showing' buttons. The 'Profile' section is partially visible, showing fields for First Name (Brennan), Last Name (Ude), Address, Office Phone, Home Phone, Cell Phone ((317) 644-5781), DL#, DL State, and Referral.

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

The screenshot shows the detailed 'Profile' section for Brennan Ude. The 'ACTION REQUIRED: Show Unit' banner is still present. The profile form includes the following fields:

- First Name: Brennan, Middle: [Redacted]
- Last Name: Ude, choo... (dropdown)
- Address: [Redacted]
- City: [Redacted]
- State: state (dropdown)
- Zip Code: [Redacted]
- Preferred Contact: None (dropdown)
- Office Phone: Office
- Home Phone: Home
- Cell Phone: (317) 644-5781
- Fax #: Fax
- DOB: [Redacted]
- Email: brennanude@gmail.com
- Email Unsubscribe: [Toggle]
- Source: Perq
- DL#: [Redacted]
- DL State: state (dropdown)
- Referral: [Redacted]
- Notes: ## PERQ Notes Begin ## Rental Timeline: Now CRM Qualification Date: 10-01-2020 10:34 AM (Eastern Daylight Time) ## PERQ Notes End ##

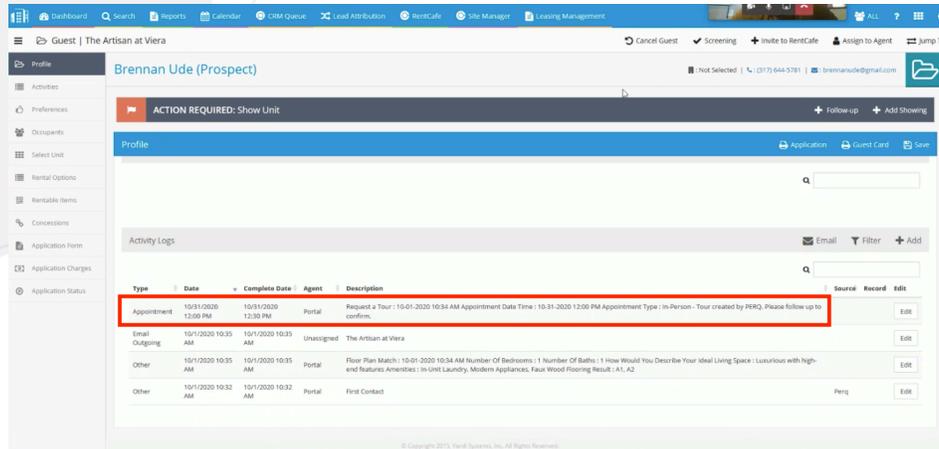
At the bottom, there is an 'Open Followups' section with a search bar and an '+ Add' button.

Keep scrolling for step 3...

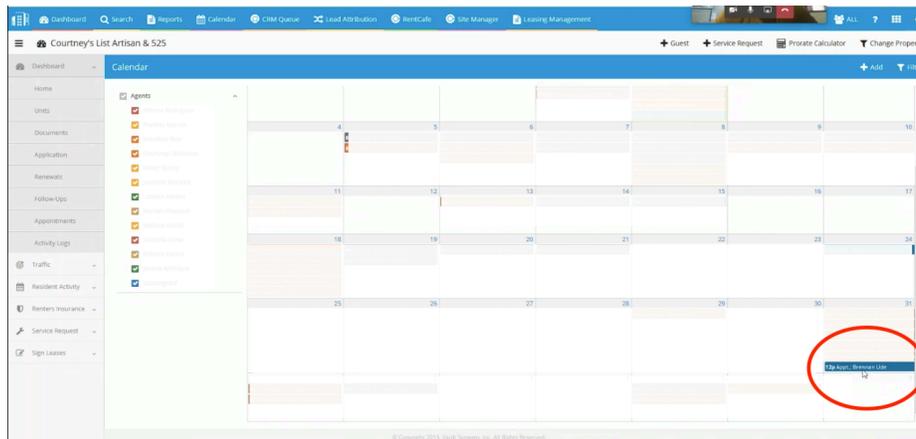


Step 3: Check for Prospect Activity and Appointments

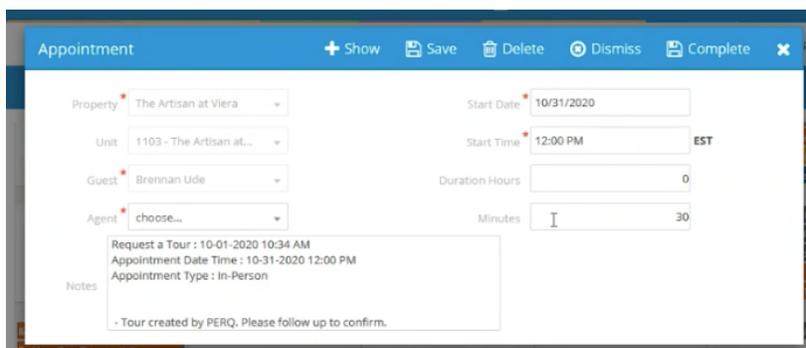
Still on the guest card, below the profile, you'll see the activity log. In the activity log, you'll see the different PERQ experiences the prospect completed on the website, as well as any appointments scheduled.



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.

