**Processing New Lead Calls**

Creating a new Lead Card in Rent Dynamics can be done in several ways based on the workflow that you are processing.

The community calls will be your home page when first logging into Rent Dynamics. You can also reach this page at any time by clicking on the Calls tab on the left side of the page.

This is a list of all calls that need to be connected to a contact card. Calls will be tagged in several different ways including:

- New Lead (No Tag)
- Repeat Leads (Yellow Lead Tag)
- Residents (Green Resident Tag)
- Past Resident (Grey Resident Tag).

Also, note the marketing source for each call on the right side of each call. **Best Practice:** Make sure the Calls queue is cleared out daily. An orange circle next to Calls on the left tab will designate that calls are waiting to be processed.
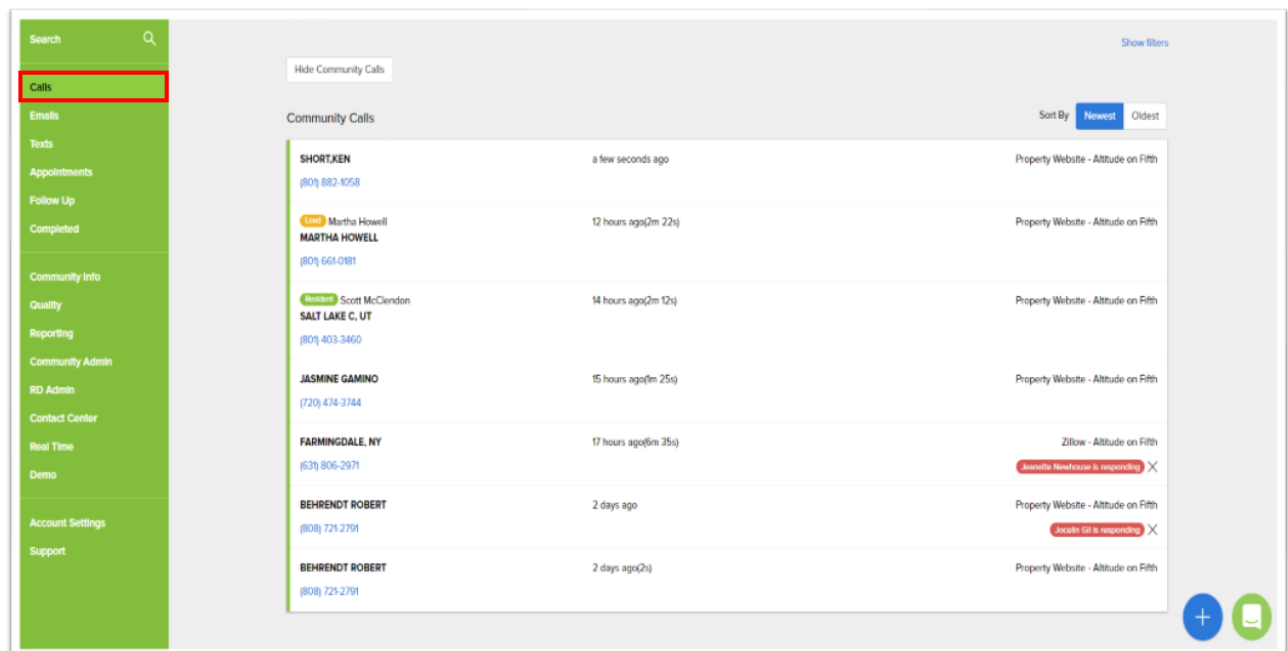
When you are ready to process a call, click on the call that you would like to work on. A Contact Card will then automatically pop up on the right-hand side of your screen. **Best Practice:** It is

always good to confirm if the caller has contacted the Community before to avoid unnecessary duplication. You can search for the caller by name, phone number, email address, or apartment number.

If there is "No Match Found", you can enter the Prospect's name and select the green Lead button.

Once you click the green Lead button, you will be directed to the new Lead Card Page. **Note:** Each area of the Contact Card that is outlined in red is required to save the Lead. This includes First Name, Last Name, Move Date, Apartment Size, and Email Address.

The Contact Card is a great tool to gather the caller's preferences and needs with minimal typing and will help you in guiding the conversation with the prospective resident. This includes gathering details regarding specific features the caller is looking for, as well as qualifying information like the number of occupants and pets. However, there is also a section for notes at the bottom of the card.

After the prospect's information has been entered in, you will have three different options: Schedule a Tour, Create a Follow-up or End Communication.

Schedule a Tour:

To schedule a tour we will click on the toggle button and this will bring up the options to schedule the Date, Time, and Apartment you will show the prospect. The apartment number can be manually entered or selected from the Community Info Page---> Pricing.

We can also offer to send a text message reminder to the prospect. **Note:** This will require verbal consent from the prospect. The text reminder also includes the community address with a link to Google Maps and the community's phone number. If an email is captured they will automatically receive an appointment confirmation via email.

After you have entered in the appointment information, we can set up notes for the Community, Management, or Self. This way your friendly staff will be prepared for the scheduled tour. However, even if you do not select someone to send a copy of the Contact Card to, your notes will still save and be available in the prospect's timeline. If the caller does not want to provide an email address, there is a toggle switch which allows you to satisfy that required field. **Best Practice:** Don't make up a fake email if they did not provide one, instead, toggle the switch. Saving the Contact Card with a scheduled appointment will automatically add the appointment into your Rent Dynamics calendar.

Create a Follow-Up:

If the caller is unable to schedule a tour, you have the ability to mark why. Reasons include: Price, Availability, Location, Away, Just Shopping, Wait List, and Not Interested. If the caller is "Just Shopping" and still has a few months before officially making their move, you can schedule a follow up closer to their move date.

Clicking on the next scheduled follow-up will allow a date to be selected for the next step in the leasing process. This will be helpful to call your prospect in a timely manner to entrust them with confidence that you are the one to help them find a new home.

You can also **End the Follow-Up** for multiple reasons. Clicking the End Follow-Up link creates a drop down for multiple options. These include:

- Disqualified ex: 23 cats, criminal background, recently evicted
- No availability ex: 100% occupied community
- No longer interested ex: New job fell through
- Out of price range ex: More than the prospect could spend
- Leased at community ex: Best case scenario
- Leased elsewhere ex: Missed opportunity
- Unable to contact ex: Wrong contact info provided

You will also be able to assign the Follow-Up to yourself if needed. This could be ideal if you are working with very specific information that the prospect has provided or if the prospect has requested that you be their only contact. Once the Follow-Up date is selected it will be pushed into the Follow-Up queue and will then be processed in another workflow. **Note:** If the date is not changed for the Follow-Up it will be auto-assigned per your Follow-up Schedule or to the following day.