

## Processing New Lead Calls

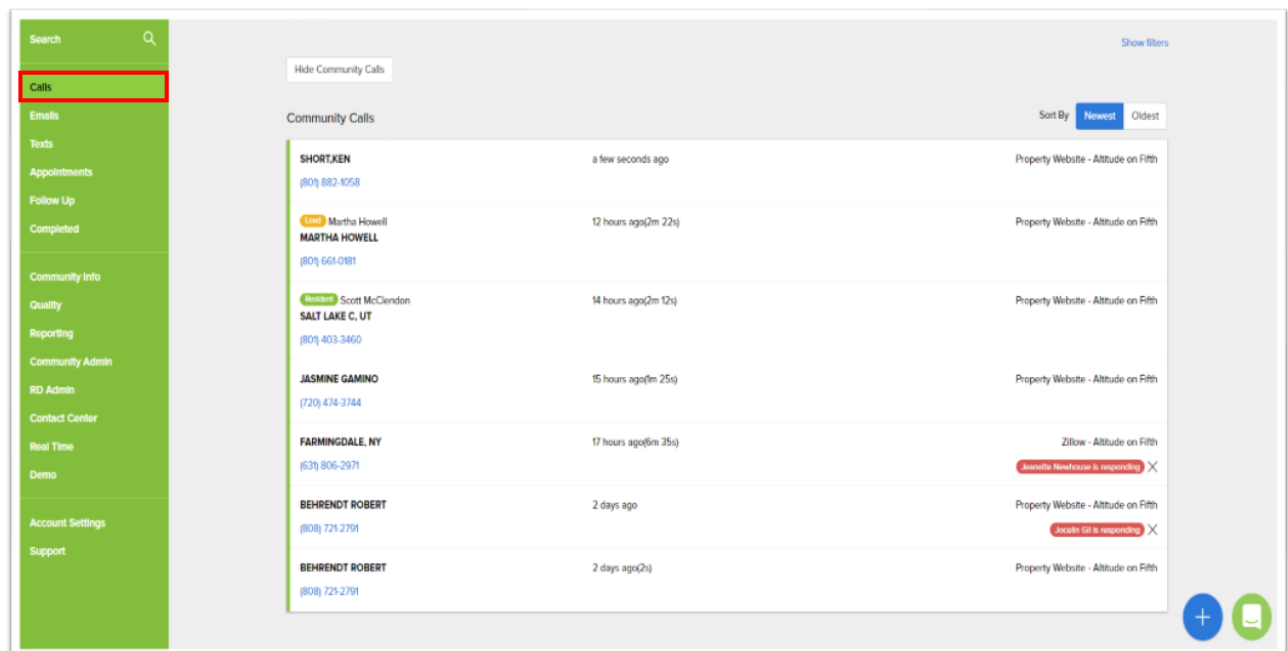
Creating a new Lead Card in Rent Dynamics can be done in several ways based on the workflow that you are processing.

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.

New Calls

Show filters

Hide Community Calls

Community Calls

Sort By

Newest

Oldest

SHORT,KEIN	a few seconds ago	Property Website - Altitude on Fifth
(801) 882-1058		Myles Howell-Quail is responding
Martha Howell	12 hours ago(2m 22s)	Property Website - Altitude on Fifth
MARTHA HOWELL		
(801) 661-0981		
Scott McClendon	14 hours ago(2m 12s)	Property Website - Altitude on Fifth
SALT LAKE C, UT		
(801) 403-3460		
JASMINE GAMINO	15 hours ago(1m 25s)	Property Website - Altitude on Fifth
(720) 474-3744		
FARMINGDALE, NY	17 hours ago(6m 35s)	Zillow - Altitude on Fifth
(631) 806-2971		Jessica Newhouse is responding
BEHRENDT ROBERT	2 days ago	Property Website - Altitude on Fifth
(808) 721-2791		Joelle G is responding
BEHRENDT ROBERT	2 days ago(2s)	Property Website - Altitude on Fifth
(808) 721-2791		

Start

Find an existing person

8018821058

Q Search

Clear

No Match Found

Or, is this a new person?

Lead

show other options

New Calls

Show filters

Hide Community Calls

Community Calls

Sort By

Newest

Oldest

SHORT,KEIN	a few seconds ago	Property Website - Altitude on Fifth
(801) 882-1058		Myles Howell-Quail is responding
Martha Howell	12 hours ago(2m 22s)	Property Website - Altitude on Fifth
MARTHA HOWELL		
(801) 661-0981		
Scott McClendon	14 hours ago(2m 12s)	Property Website - Altitude on Fifth
SALT LAKE C, UT		
(801) 403-3460		
JASMINE GAMINO	15 hours ago(1m 25s)	Property Website - Altitude on Fifth
(720) 474-3744		
FARMINGDALE, NY	17 hours ago(6m 35s)	Zillow - Altitude on Fifth
(631) 806-2971		Jessica Newhouse is responding
BEHRENDT ROBERT	2 days ago	Property Website - Altitude on Fifth
(808) 721-2791		Joelle G is responding
BEHRENDT ROBERT	2 days ago(2s)	Property Website - Altitude on Fifth
(808) 721-2791		

Start

Find an existing person

8018821058

Q Search

Clear

No Match Found

Or, is this a new person?

Lead

show other options

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.

**New Calls**

Hide Community Calls

Sort By: Newest, Oldest

SHORT KEEN	a few seconds ago	Property Website - Altitude on Fifth
(801) 882-1058		Martha Howell Quality is responding
MARTHA HOWELL	12 hours ago (2m 22s)	Property Website - Altitude on Fifth
(801) 661-0181		
SCOTT MCCLENDON	14 hours ago (2m 12s)	Property Website - Altitude on Fifth
SALT LAKE C, UT		
(801) 403-3460		
JASMINE GAMINO	15 hours ago (1m 25s)	Property Website - Altitude on Fifth
(720) 474-3744		
FARMINGDALE, NY	17 hours ago (6m 35s)	Zillow - Altitude on Fifth
(631) 806-2971		Jacaline Headhouse is responding
BEHRENDT ROBERT	2 days ago	Property Website - Altitude on Fifth
(808) 721-2791		Jacaline Gil is responding
BEHRENDT ROBERT	2 days ago (2s)	Property Website - Altitude on Fifth
(808) 721-2791		

**Lead**

Back to Search

**Move**

First Name, Last Name, Date, Move Info, Rent Price

NAME, MOVE INFO

S, 1, 2, 3, 4, 1, 1.5, 2, 2.5, 3

BEDS, BATHS

1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15+

LEASE TERM

Job, Work, School, People, Price, Location, Lease, Temp, First Apt

MOVE REASON

Looking For

Furnished, Garage, W & D, Utilities, 1st Floor, Top Floor, Reception, Townhome

AMENITIES

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.

New Calls

Show filters

Hide Community Calls

Community Calls

Sort By  
Newest  
Oldest

<b>SHORT, XEN</b> (801) 882-1058	a few seconds ago	Property Website - Altitude on Fifth <b>Myles Howell</b> Quality is responding
<b>MARTHA HOWELL</b> (801) 661-0181	12 hours ago(2m 22s)	Property Website - Altitude on Fifth
<b>SCOTT MCCLENDON</b> <b>SALT LAKE C, UT</b> (801) 403-3460	14 hours ago(2m 12s)	Property Website - Altitude on Fifth
<b>JASMINE GAMINO</b> (720) 474-3744	15 hours ago(1m 25s)	Property Website - Altitude on Fifth
<b>FARMINGDALE, NY</b> (631) 806-2971	17 hours ago(6m 35s)	Zillow - Altitude on Fifth <b>Joanette Newhouse</b> is responding
<b>BEHRENDT ROBERT</b> (808) 721-2791	2 days ago	Property Website - Altitude on Fifth <b>Jocelin Gil</b> is responding
<b>BEHRENDT ROBERT</b> (808) 721-2791	2 days ago(2s)	Property Website - Altitude on Fifth

Furnished

Garage

W & D

Utilities

1st Floor

Top Floor

Floorplan

Tour/Info

AMENITIES

★

📍

🏠

🔑

🏡

🏠

🏠

🏠

NEWER

AMENITIES

LOCATION

PHOTO

MAP

GALLERY

SORT

PRICE

SHORT

COMMUNITY

Occupants

1 2 3 4 5 6+

OCCUPANTS

+ Add Additional Occupant

Animals

No Animals

Dog

Cat

ANIMAL TYPE

Appointment

Schedule appointment

First Name

Last Name

Phone Number

Email Address

Declined email address

Lead would like to receive text messages from the community (requires verbal consent)

CONTACT INFO

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.

New Calls

Show filters

Hide Community Calls

Community Calls

Sort By  
Newest  
Oldest

<b>SHORT, XEN</b> (801) 882-1058	a few seconds ago	Property Website - Altitude on Fifth <b>Myles Howell</b> Quality is responding
<b>MARTHA HOWELL</b> (801) 661-0181	12 hours ago(2m 22s)	Property Website - Altitude on Fifth
<b>SCOTT MCCLENDON</b> <b>SALT LAKE C, UT</b> (801) 403-3460	14 hours ago(2m 12s)	Property Website - Altitude on Fifth
<b>JASMINE GAMINO</b> (720) 474-3744	15 hours ago(1m 25s)	Property Website - Altitude on Fifth
<b>FARMINGDALE, NY</b> (631) 806-2971	17 hours ago(6m 35s)	Zillow - Altitude on Fifth <b>Joanette Newhouse</b> is responding
<b>BEHRENDT ROBERT</b> (808) 721-2791	2 days ago	Property Website - Altitude on Fifth <b>Jocelin Gil</b> is responding
<b>BEHRENDT ROBERT</b> (808) 721-2791	2 days ago(2s)	Property Website - Altitude on Fifth

Schedule appointment

✓ You've selected unit number C1307 for the appointment. Change Unit

Date

Time

Select Agent

Appointment Date

Appointment Time

Agent Showing Unit (optional)

Send text message reminder

1 hr

prior to appointment (requires verbal consent)

If email is captured, lead will automatically receive an email appointment confirmation

SCHEDULE

First Name

Last Name

Phone Number

Email Address

Declined email address

CONTACT INFO

+ Show Address Fields

Notes

Type optional notes here...

Send this to:

Comm

Comm Mgr

Assistant Mgr

Maint

Self

Save

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.

The image shows two side-by-side screenshots from the Rent Dynamics software. The left screenshot, titled 'New Calls', displays a list of community calls. The right screenshot shows the 'Schedule appointment' form, which is highlighted with a red border.

**New Calls**

Hide Community Calls Show filters

Community Calls Sort By Newest Oldest

Call	Time	Property Website - Altitude on Fifth
<b>SHORT, KEN</b> (801) 882-1058	a few seconds ago	<b>Myles Howell-Quilty is responding</b>
<b>LEAD</b> Martha Howell <b>MARTHA HOWELL</b> (801) 661-0181	12 hours ago(2m 22s)	Property Website - Altitude on Fifth
<b>REACT</b> Scott McClendon <b>SALT LAKE C, UT</b> (801) 403-3460	14 hours ago(2m 12s)	Property Website - Altitude on Fifth
<b>JASMINE GAMINO</b> (720) 474-3744	15 hours ago(1m 25s)	Property Website - Altitude on Fifth
<b>FARMINGDALE, NY</b> (631) 806-2971	17 hours ago(6m 35s)	Zillow - Altitude on Fifth
<b>BEHRENDT ROBERT</b> (808) 721-2791	2 days ago	<b>Juanita Newhouse is responding</b>
<b>BEHRENDT ROBERT</b> (808) 721-2791	2 days ago(2s)	<b>Jocelin Gil is responding</b>

**Schedule appointment**

✓ You've selected unit number C1307 for the appointment. [Change Unit](#)

Date Appointment Date Time Appointment Time Select Agent Agent Showing Unit (optional)

☐ Send text message reminder 1 hr prior to appointment (requires verbal consent)

If email is captured, lead will automatically receive an email appointment confirmation

**SCHEDULE**

First Name Last Name Phone Number Email Address Declined email address

**CONTACT INFO**

+ Show Address Fields

**Notes**

Type optional notes here...

Send this to: Comm Comm Mgr Assistant Mgr Maint Self Save

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.



**New Calls**

Hide Community Calls

Community Calls

Sort By: Newest / Oldest

SHORTKATEN	a few seconds ago	Property Website - Altitude on Fifth
(801) 882-1058		Myra Howell-Quilty is responding
<b>MARTHA HOWELL</b> (801) 661-0981	12 hours ago(2m 22s)	Property Website - Altitude on Fifth
<b>SCOTT MCCLENDON</b> SALT LAKE C, UT (801) 403-3460	14 hours ago(2m 12s)	Property Website - Altitude on Fifth
<b>JASMINE GAMINO</b> (720) 474-3744	15 hours ago(1m 25s)	Property Website - Altitude on Fifth
<b>FARMINGDALE, NY</b> (631) 806-2971	17 hours ago(6m 35s)	Zillow - Altitude on Fifth Aurora Newhouse is responding
<b>BEHRENDT ROBERT</b> (808) 721-2791	2 days ago	Property Website - Altitude on Fifth Jacelin Gil is responding
<b>BEHRENDT ROBERT</b> (808) 721-2791	2 days ago(2s)	Property Website - Altitude on Fifth

**Schedule appointment**

First Name: Last Name: Phone Number: 801.882.1058 Email Address: Declined email address: ☐

☐ Lead would like to receive text messages from the community (requires verbal consent)

**CONTACT INFO**

+ Show Address Fields

Price Availability Location Away Wait List Not Interested

**REASON FOR NO APPOINTMENT**

Background Credit Pet Over Income Under Income Student

**DISQUALIFICATIONS**

**Follow Up**

☐ Assign all follow up for this lead to me

Thu, 8/16

Next scheduled follow up

End follow up

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

New Calls

Show filters

Hide Community Calls

Community Calls

Sort By

Newest

Oldest

SHORTKERN	a few seconds ago	Property Website - Altitude on Fifth
(801) 882-1058		Myles Howell-Quilty is responding
LEAD	MARTHA HOWELL	12 hours ago(2m 22s)
(801) 661-0981		Property Website - Altitude on Fifth
LEAD	SCOTT MCCLENDON	14 hours ago(2m 12s)
SALT LAKE C, UT		Property Website - Altitude on Fifth
(801) 403-3460		
JASMINE GAMINO	15 hours ago(1m 25s)	Property Website - Altitude on Fifth
(720) 474-3744		
FARMINGDALE, NY	17 hours ago(6m 35s)	Zillow - Altitude on Fifth
(631) 806-2971		Alexandra Newhouse is responding
BEHRENDT ROBERT	2 days ago	Property Website - Altitude on Fifth
(808) 721-2791		Jacelin Gil is responding
BEHRENDT ROBERT	2 days ago(2s)	Property Website - Altitude on Fifth
(808) 721-2791		

Schedule appointment

First Name

Last Name

Phone Number

Email Address

Declined email address

Lead would like to receive text messages from the community (requires verbal consent)

CONTACT INFO

+ Show Address Fields

Price

Availability

Location

Assy

Walt List

Not Interested

REASON FOR NO APPOINTMENT

Background

Credit

Pet

Over Income

Under Income

Student

DISQUALIFICATIONS

Follow Up

Assign all follow up for this lead to me

Thu, 8/16

Next scheduled follow up

End follow up

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.