Yardi VoyagerPlus
RENT*Café* CRM
Setup Guide

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Document Changes

The following table lists the plug-in versions documented in each manual revision. To determine which plug-in versions you use, select **Administration > About**. If a manual documents multiple plug-ins, use the manual revision associated with the most recent plug-in version you use.

A number following the revision letter indicates changes since the previous revision are non-substantive: style, pagination, and so on. Thus, revision a.1 contains the same substantive material as revision a.

Publication Date	Document Revision	Newly Documented Software	Other Substantive Changes
20 June 2016	a	VoyagerPlus LeasingPad Plug-in 6.0	LeasingPad CRM product brand renamed to RENT*Café* CRM

Contents

Introduction

About RENT*Café* CRM

With RENT*Café* CRM, you can manage guests and residents at multi-family properties using a desktop, laptop, or a mobile tablet device. This guide is primarily intended for use by system administrators.

By using RENT*Café* CRM, you can perform procedures that are typically completed in Yardi Voyager Residential, including processing leases and lease renewals, reviewing dashboards, generating reports, and viewing events. You can also manage guest and resident relationships with the integrated Customer Relationship Management (CRM) tools.

RENT*Café* CRM connects to your Voyager databases, including Yardi Voyager Residential, through Yardi VoyagerPlus.

This manual includes information specific to LeasingPad Plug-In 6.0.

About Yardi VoyagerPlus

RENT*Café* CRM is a part of the Yardi VoyagerPlus suite of apps. The VoyagerPlus system includes multiple Yardi mobile companion products, or "apps", for Yardi Voyager, including RENT*Café* CRM.

VoyagerPlus apps have many functions and features in common including:

- Using interface elements on screens

- Searching Records

- Using and managing dashboards

- Generating reports

For information about setting up VoyagerPlus, which is required to use RENT*Café* CRM and other apps, see the *Voyager Plus Setup and Administration Guide*.

For information about generally using VoyagerPlus, see the *Voyager Plus User Interface and Common Procedures Guide*.

Browser Requirements

Yardi RENT*Café* CRM is supported in the following web browsers, though optimized for mobile platforms:

- Internet Explorer 9 or later

- Google Chrome

- Mozilla Firefox

- Apple Safari

About the Documentation

This document describes how to set up Yardi VoyagerPlus RENT*Café* CRM.

Your system administrator configures Yardi VoyagerPlus RENT*Café* CRM and manages the security settings. Configuration and security settings affect the appearance of Yardi VoyagerPlus RENT*Café* CRM and determine the options that are available to users. Most screens and menu paths described in this document are for a standard implementation with the least restrictive security settings. The screens and descriptions may not match those that you see when you use Yardi VoyagerPlus RENT*Café* CRM. This document does not typically describe fields like **Name** or **Unit #**, for which the purpose is self-evident. Unless otherwise indicated, menu paths are for the side menu.

You can find the latest documentation on Yardi Client Central:

https://support.yardi.com/VoyagerPlusProductManualList.asp

If you need help determining your logon name and password, contact their Yardi system administrator.

Notes

An information note provides background information. For example, it may explain how changes made in one screen affect data that appears in another screen.

A caution note explains how to avoid a potential problem, or indicates that a process will cause irreversible changes to your data.

A tip describes a way to get more from your software. For example, it may explain an alternative way to perform a task.

Help

Most Voyager screens have a **Help** button for quick access to information about using the screen.

CHAPTER 1

Voyager Setup

This chapter describes how to set up Yardi Voyager for use with RENT*Café* CRM.

The information in this chapter is intended for Yardi Voyager system administrators.

Voyager Setup Overview

Before your organization can use RENT*Café* CRM, you must perform the following procedures in Yardi Voyager:

- **LeasingPad Configuration**: Define the number of hours that must pass after follow-ups are scheduled in order for them to be considered "missed," and allow or prevent users from editing "missed" follow-ups. This can be set up in the **Leasing Pad CRM** section on the **Leasing Pad Configuration** screen in Voyager. For more information, see "Configuring RENTCafé CRM in Voyager" on page 8.

- **Leasing Agents**: You must add each agent using RENT*Café* CRM as a leasing agent for each the properties they have access to, and associate each agent with the employee/user record in Voyager. For more information, see "Adding Leasing Agents" in the *Voyager Residential User's Guide*.

> You can also add leasing agents to properties in RENT*Café* CRM. For more information, see "Adding, Reviewing, and Editing Leasing Agents" in the *RENTCafé CRM User Guide*.

- **Results/Reasons**: For each results/reasons in Voyager, select the **Approve Application** column if you want the approved applicant to be able to select the given reason for renting from the community. For more information, see "Leasing Fields Setup" in the *Voyager Residential User's Guide.*

- **Attachments**: If you want users to be able to attach files, such as property brochures or pictures, to emails sent to guests and residents in RENT*Café* CRM, you must attach the files to the property records in Voyager and assign to them the **Email Attachment** attachment type. For more information, see "Uploading Attachments" in the *Voyager Core User's Guide*.

- **Company Code** entry: Enter your organization's company code in the **Company Code** field of the **RENT*Café*** section on the **Leasing Pad Configuration** screen in Voyager. For more information, see "Configuring RENTCafé CRM in Voyager" on page 8.

- **Property City** validity check: Ensure that the city on the Voyager property record is valid, for each of your properties. For more information about reviewing properties, see "Property Records" in the *Voyager Core Setup Guide*.

Additionally, you can configure and customize your VoyagerPlus Interface and Dashboards

Voyager Setup Procedures

In this chapter:

This section describes how to configure Voyager for use with RENT*Café* CRM.

Setting Up Security

RENT*Café* CRM honors the security as set up in Voyager. All users, groups, and permissions carry over to the VoyagerPlus environment with only a few additional settings that need to be completed.

Setting Up Voyager User and Group Access for RENT*Café* CRM

In order to provide users with the ability to log into the VoyagerPlus environment, the RENT*Café* CRM program rights must be granted in Voyager.

You can set them up individually or use a function script for all designated users.

This section includes the following procedures:

To set up a user in Voyager to access RENT*Café* CRM

1 From the Voyager **System Administration** side menu, select **Review Users**. The **Users** filter appears.

Users	
User Code	ajones
Login Name	
Group	
Status	Both ▾
Interface Users	All ▾
Display Rows	500
	Submit Clear Help

2 Complete the filter, and click **Submit**. The **Employee/User** screen appears.

Employee / User Setup   Data ▾   **Jump To**

Code	min
Lastname	testlast
Firstname	Mintest
Dear	
Address	
Post Code-City	
Country	at ▾
Phone	
Department	▾
Title	▾

Employee Only? ☐   Inactivate User/Employee? ☐

Notes

Include in List
Work Order Labor ☐
Inspector ☐
Caseworker ☐

User defined fields

G/L Accounts
Pay Acct
Charge Code

Save   New   Close   Help

Security | Privileges | Program Rights | Regional Settings | VoyagerPlus Program Rights

3 Select the **VoyagerPlus Program Rights** tab.

Save   New   Close   Help

Security | Privileges | Program Rights | Regional Settings | VoyagerPlus Program Rights

Residential Leasing Pad ☑   SFH Leasing Pad ☐   Cash Management

4 Select **Residential Leasing Pad**, and click **Save**.

To set up a group of users in Voyager to access RENT*Café* **CRM**

1 From the Voyager side menu, select **Reports > SQL Reports**. The **SQL Reports** screen appears.
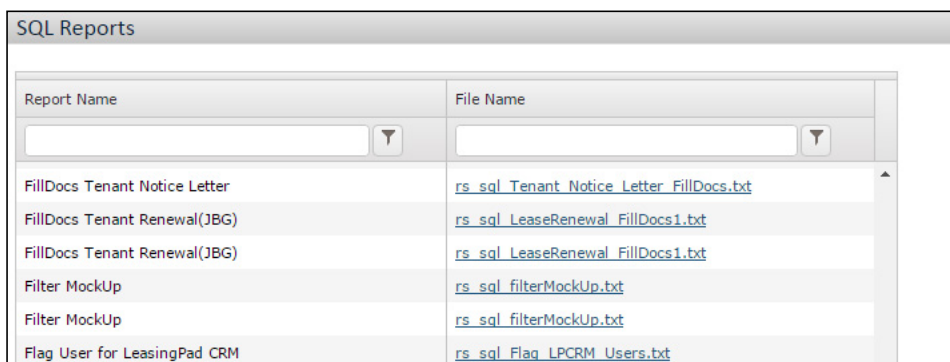
2 In the row corresponding to the **Flag User for LeasingPad CRM** report name, click the file name. The **[Report name]** screen appears.

3 Complete the fields. For field descriptions, see "Flag User for LeasingPad CRM Screen Reference" on page 4.

4 Click **Submit**.

Flag User for LeasingPad CRM Screen Reference

User Group	Required.
User	Select individual users or all users in the group.
	NOTE Leave blank to select all users within the group.
Set Access to	Determines which users to flag for access or no access.
	Access Selected users will be flagged for access
	No Access Selected users will not be flagged for access. (Use only if needing to remove access for users that were previously allowed access.)

Report Only	Determines whether to preview existing settings, or not, before running the script.
	Yes Previews the existing settings for the selected users.
	No Sets the flag for the selected users in the selected group, when **Access** is selected in the **Set Access to** field.
Destination	Determines whether the report is displayed, exported, emailed, or saved.
	Options are: **Screen**, **Screen (optimized for landscape printing)**, **Screen (optimized for portrait printing)**, **Download CSV File**, **Email XLSX File**, **Email PDF File**, **Save to XLSX File**, or **Save to PDF File**

Setting Up Voyager Security Groups for RENT*Café* CRM Menus

If you want your security groups to access menus in RENT*Café* CRM, you can set them with a the VoyagerPlus Apps Menu.

To set up a security group in Voyager to use RENT*Café* CRM menus

1   From the Voyager **System Administration** side menu, select **Review Groups**. The **Security Groups** filter appears.

2   Complete the filter, and click **Submit**. The **Security Group** screen appears.

3   Click the **VoyagerPlus App Menus** tab.

4 In the **Menuset Name** field, select 'resleasingpad'.

> This is the standard menu set. As a system administrator, you can create custom menu sets as needed.

5 Select **Default**, and click **Save**.

Setting RENT*Café* CRM User Permissions in Voyager

There are several permissions in Voyager specifically designed for granting users access in RENT*Café* CRM to the specific section or functionality that they affect in RENT*Café* CRM.

For information about setting up permissions in Voyager, see "Setting Menu and Data-Access Permissions" in the *Voyager Core Administration Guide*.

RENT*Café* CRM Security Permissions in Voyager

Permission	Functionality	Section affected	Related procedures
ResCRM-Deactivate_Followups	Grants users the ability to deactivate follow-ups at the guest record of RENT*Café* CRM. (Deactivated follow-ups are removed from the CRM Queue and no longer require completion.)	**Guest screen > Activities > Follow-Ups tab > Edit button > Deactivate button**	"Reviewing, Editing, and Deactivating Follow-Ups" in the *RENTCafé CRM User's Guide*
ResCRM-Email_Template_Design	Grants users the ability to add property specific email templates and control email themes at the property record of RENT*Café* CRM	**Property screen > Email Templates**	"Adding, Reviewing, Editing, and Deleting Email Templates" in the *RENTCafé CRM User's Guide*
ResCRM-Events_Configuration	Grants users access to manage Event configuration	**Settings > Event Configuration**	"Configuring Notification and Alert Events" on page 13
ResCRM-Followup_Templates	Grants users the ability to add property-specific follow-up templates at the property record of RENT*Café* CRM	**Property screen > Follow-up Templates**	"Loading Follow-Up Templates to Properties" on page 18 "Follow-Up Templates" in the *RENTCafé CRM User's Guide*.

Permission	Functionality	Section affected	Related procedures
ResCRM-Send_To_Community	Grants users the ability to send guests to Sister Communities	**Guest screen > Send to Community button**	"Transferring Guests To A Sister Property" in the *RENTCafé CRM User's Guide.*
ResCRM-Sister_Property	Grants users the ability to add Sister Communities to the property record within RENT*Café* CRM	**Property screen > Sister Property**	"Adding Sister Properties" on page 23
ResCRM-Queue_Management	Grants users the ability to clear CRM queue items at the property record of RENT*Café* CRM	**Property screen > Profile > Queue Management**	"Clearing the CRM Queue" on page 16
BI: Dashboard Administration	Grants users the ability to review dashboards and manage them by assigning specific users to dashboards	**Settings Gear > Dashboard Administration > Manage > Users**	"Dashboards" in the *VoyagerPlus User Interface and Common Procedures Guide*
BI: Edit Dashboard	Grants users the ability to add new dashboards as well as edit existing dashboards within RENT*Café* CRM	**Settings Gear > Dashboard Administration > Manage > Edit**	"Dashboards" in the *VoyagerPlus User Interface and Common Procedures Guide*

Configuring RENT*Café* CRM in Voyager

Configuring RENT*Café* CRM in Voyager includes specific, optional settings at the system level for the following:

● Follow-ups

● Office hours

● Appointments

● CRM Calendar

● CRM Queue management

At the same time, you can configure the following in Voyager, if you use or plan on using them with RENT*Café* CRM:

● Maintenance service request emails

● RENT*Café*

● LeasingKIOSK

To configure RENT*Café* CRM in Voyager

1 From the Voyager side menu, select **Setup > System > Leasing Pad Configuration**. The **Leasing Pad Configuration** screen appears.

2 Complete the **LeasingPad CRM** section:

Leasing Pad Configuration

Leasing Pad CRM

Allow Edit Missed Followups	☑
Followup Is Missed After	32.00 Hours
Honor Office Hours	☑
Default Appointment Duration	15.00 Minutes
Default Calendar View	Daily ▼ All ▼
CRM Queue Lock Duration	2.00 Minutes

Save

Allow Edit Missed Follow-ups	Allows users to edit missed follow-ups from guest and resident records.
Follow-up Is Missed After	Number of hours that must pass after a follow-up is scheduled before the follow-up is considered "missed."
	To allow users to edit missed follow-ups, you must select the **Allow Edit Missed Follow-ups** check box above.
Honor Office Hours	Enables office hours for the property.
	To set the office hours, see "Setting Office Hours" on page 25.
Default Appointment Duration	Sets the default number of minutes allowed for new appointments.
Default Calendar View	Sets the default view of the calendar on the dashboard. Select from **Daily, Weekly**, or **Monthly** options, and and whether you want the calendar view to default to showing all or one of the following options: **Appointments**, **Showings**, **Move Ins**, **Move Outs**, **Memos**
CRM Queue Lock Duration	Number of minutes an agent is allowed to work on an email or phone call lead without saving it as a guest card before a time-out message appears.
	The agent must click the **I need more time** message to be able to continue working on the lead and lock out other users from being able to work the lead.
	If the agent does not indicate the need for more time, the lead is returned to the queue, and another agent may open it.

3 Click the **Save** button in the **Leasing Pad CRM** section.

4 If your organization uses RENT*Café* and wants to access it in RENT*Café* CRM:

    a Complete the RENT*Café* section:

Disallow Sister Property Referrals	Prevents users from accessing RENT*Café* from RENT*Café* CRM.
	If clear, both the **RENT*Café*** and **Site Manager** top menu items appear.
Company Code	Sets your organization's company code for RENT*Café*. If you do not know this code, contact RENT*Café* technical support.
Default Property Search Radius	Determines which properties appear on the property search results screen when clicking the RENT*Café* CRM button in RENT*Café* CRM. In addition to the property that you select in RENT*Café* CRM, the results screen also shows properties within the specified number of miles from the center of the city in which the selected property is located.
	For example: Property A is located in City 1, properties B and C are located in City 2, and City 2 is 15 miles from City 1. If you specify a search radius of 15 or more miles, properties B and C will appear on the property search results screen when you select property A.
	NOTE If you specify a search radius that is larger than 100 miles, you will be prompted to reduce the radius when selecting a property in RENT*Café* CRM.

    b Click the **Save** button in the **RENT*Café*** section.

5 If your organization wants to email a maintenance staff member when users add service requests:

    a Complete the **Maintenance** section:

Allow Maintenance Email	Select this check box.
	If clear, no emails will be sent to maintenance staff.
Maintenance Email	The email address to which you want to send service request notification emails.
	NOTE Only one email address per portfolio is allowed, and it would be most helpful if an internal maintenance help desk email address is used.

    b Click the **Save** button in the **Maintenance** section.

6 If your organization uses **LeasingKIOSK**:

    a Complete the **LeasingKIOSK** section:

Voyager Connect URL	Yardi assigned URL to connect to your farm.
	CAUTION You must contact Yardi Technical support to receive your Voyager Connect URL.
Alias	
Server	Server name
Name	Database name
Platform	Options are: **SQL Server** or **Oracle**.

    b Click **Generate QR Code**.

CHAPTER 2

RENT*Café* CRM Setup

This chapter describes how to set up RENT*Café* CRM for use with your properties.

The information in this chapter is intended for primarily for Yardi Voyager system administrators.

RENT*Café* CRM Setup Overview

There are several set up tasks you can complete to customize RENT*Café* CRM for use with your properties. These include settings for:

- Notifications and Alerts (Reminders)
- Time Zone
- Enabling Follow-Up templates
- Clearing CRM Queue
- Loading Follow-Up templates

- Email Themes
- Sister Properties
- Office Hours
- Lead Scores

Notifications and Alerts

This section describes how to configure notifications and alert for events in RENT*Café* CRM.

Configuring Notification and Alert Events

You can set up RENT*Café* CRM to inform users when events related to them occur in the system, such as when someone assigns a prospect to the user, or when a follow-up becomes missed. There are two types of messages—notifications and alerts:

	Notifications	Non-critical messages concerning events that have occurred.
	Alerts	Critical messages concerning events that will occur soon or have already occurred.

Before users can view notifications and alerts, you must configure the rules for each supported event.

> To configure notification and alert events, your user group must have access to the **RESCRM-Events_Configuration** security permission. For more information, contact your system administrator.

To configure a notification or an alert event

1   From the top menu of the dashboard, select **Settings** ⚙ > **Event Configuration**. The **Event Configuration** screen appears.

Event Description	Type	Active?	Edit
Existing Prospect Assigned	Notification	🔒	Edit
New Activity scheduled	Notification	🔒	Edit
New Appointment scheduled	Notification	🔒	Edit
New Followup assigned	Notification	🔒	Edit
New Prospect Assigned	Notification	🔒	Edit
Activity Reminder	Alert	🔒	Edit
Appointment Reminder	Alert	🔒	Edit
Due Followups Reminder	Alert	🔒	Edit
Missed Followups Reminder	Alert	🔒	Edit
New Pop in Queue	Alert	🔒	Edit

2 Click the **Edit** button in the row corresponding to the event for which you want to set up a notification or alert. For event descriptions, see "Notification and Alert Events" on page 15. The **Event** screen appears.

3 Edit the top part of the screen:

Event Duration Time	**Notification** Number of days, hours, or minutes after the event occurs during which the notification is displayed to users. Select the unit of time to use in the **Duration Unit** field below.
	Alert Number of days, hours, or minutes before or after the event occurs (depending on the event) during which the alert is displayed to users. Select the unit of time to use in the **Duration Unit** field below.
	TIP You can reverse the logic of this field for alerts by using a negative integer. For example, if you want an alert to display 2 days *after* an event occurs, type **-2** in this field and select **Days** in the **Event Duration Time** field below.
Duration Unit	Unit of time to use with the **Even Duration Time** field above.
Pop-up Message	Message to display as an alert or notification.
Active	Makes the notification or alert active.

4 Toggle the **Display** switch in the rows corresponding to the user security groups for which you want to enable the notification or alert.

5 Click the **Save** button 🖫.

Notification and Alert Events

Event	Type	Description
Existing Prospect Assigned	Notification	Notifies an agent after an existing guest card is assigned to them.
New Activity Scheduled	Notification	Notifies an agent after a new activity is assigned to them.
New Appointment Scheduled	Notification	Notifies an agent after a new appointment is assigned to them.
New Follow-up Assigned	Notification	Notifies an agent after a new follow-up is assigned to them.
New Prospect Assigned	Notification	Notifies an agent after a new guest card is assigned to them.
Activity Reminder	Alert	Alerts an agent before an activity that they are assigned to is scheduled to begin.
Appointment Reminder	Alert	Alerts an agent before an appointment that they are assigned to is scheduled to begin.
Due Follow-ups Reminder	Alert	Alerts an agent before a follow-up that they are assigned is due.
Missed Follow-ups Reminder	Alert	Alerts an agent after a follow-up that they are assigned to becomes missed. **NOTE** Follow-ups become missed based on the **Follow-up Is Missed After** setting in the Leasing Pad Configuration part of the Voyager setup. For more information, see "Configuring RENTCafé CRM in Voyager" on page 8.
New Pop in Queue	Alert	Alerts all agents after a new item pops into the CRM queue. **NOTE** This can take the place of the pop applet for tablet users.

Property Time Zone

This sections describes how to set the time zone for your properties in RENT*Café* CRM.

Setting the Property Time Zone
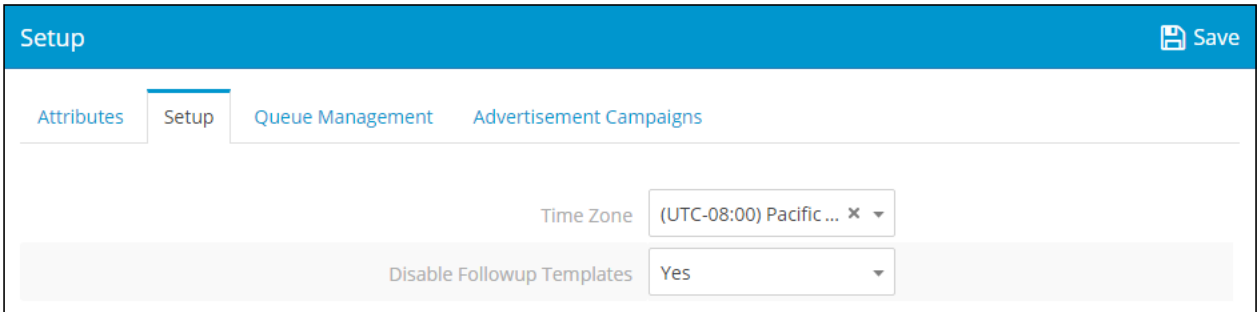
You can set the time zone for a property at any time.

The time zone setting can affect office hours set for each property. For information about setting office hours, see "Setting Office Hours" on page 25.

To set up the time zone for a property

1   Open the record for the property whose time zone you want to set up. For more information, see "Searching for Records" in the *VoyagerPlus RENTCafé CRM User's Guide*. The **Property** screen appears.

2 On the side menu, select **Profile**, if not already selected. Select the **Setup** tab.

3 In the **Time Zone** field, select the time zone you want to use for the property.

4 Click **Save**.

CRM Queue Management

This section describes how you can clear the CRM Queue.

Clearing the CRM Queue

You can set up selected filter criteria for clearing queue items. Each time you clear the queue, a line item is entered into the Queue Management Log that reflects the information cleared from the queue.

This procedure is useful when a queue becomes 'flooded' with too many items.

A need to clear the queue is indicative of some sort of problem. If the problem persists, contact Yardi technical support.

To clear the CRM Queue at a property

1 Open the record for the property whose CRM Queue you want to clear. For more information, see "Searching for Records" in the *VoyagerPlus RENTCafé CRM User's Guide*. The **Property** screen appears.

2 On the side menu, select **Profile**, if not already selected. Select the **Queue Management** tab.

Queue Management				Clear Queue

Attributes   Setup   Queue Management   Advertisement Campaigns

Phone Leads ● Start Date* [ ]
Email Leads ● Start Time* [12:00 AM] PST
Web Leads ○ End Date* [ ]
Sister Community Leads ○ End Time* [12:00 AM] PST

Queue Management Log

🔍 [   ]

Lead Type	Start Date/Time	End Date/Time	Agent	Created Date/Time
Incoming Phone	2/1/2016 1:00 AM	2/2/2016 1:00 AM	Pandey	2/2/2016 1:45 AM
Incoming Email	1/1/2014 1:00 AM	1/1/2015 12:45 AM	Pandey	12/9/2015 9:19 PM
Web Request	1/1/2014 1:00 AM	1/1/2015 12:45 AM	Pandey	12/9/2015 9:19 PM

3 In the corresponding row, select the lead type or types that you want cleared from the queue.

4 Select the start and end dates and times you want to clear the queue.

5 Click **Clear Queue**.

Follow-Up Templates

This section describes how to load and how to enable or disable follow-up templates.

For information about adding and managing individual follow-up templates, see "Follow-Up Templates" in the *VoyagerPlus RENTCafé CRM Users Guide*.

Follow-Up Templates Overview

A *follow-up template* is a type of reminder that is associated with a specific event type with the ability to schedule multiple follow-ups. The *event type* specifies when RENT*Café* CRM adds a follow-up to a guest or resident record and the CRM Queue, and when the follow-up for that event is due.

You can add follow-up templates to RENT*Café* CRM in three different ways:

- Load the full set of default templates.

- Copy and load a full set of templates from another property.

- Manually add individual follow-up templates from the default selection of event types. For more information, see "Adding Follow-Up Templates" in the *VoyagerPlus RENTCafé* CRM *User's Guide.*

Your can disable and re-enable all existing follow-up templates for a property.

Loading Follow-Up Templates to Properties

You can load a set of follow-up templates by either of the following two options:

- Default follow-up templates.

- Follow-up templates from another property record.

> ⚠️ Loading follow-up templates to a property record overwrites any existing follow-up templates on that record. Therefore, the ability to load defaults, from either the system or a sister property, is disabled once a follow-up template is defined for the given property.

Default Follow-up Templates

RENT*Café* CRM includes a set of default follow-up templates that you can load for your properties. These templates represent typical operations at a property.

The default follow-up templates that RENT*Café* CRM loads appear in the grid below:

Event Type	Description	Type	Type Description	Due In
First Contact	First Contact follow-up	**Call**	Schedule showing	1 day
		Email	Property brochure	2 days
First Showing	First Showing follow-up	**Email**	Thank you for visiting	1 day
		Call	Encourage online leasing	3 days
Submit Application	Submit Application follow-up	**Email**	Notify of application status	1 day
Approve Application	Approve Application follow-up	**Call**	Congratulations and welcome	1 day
		Email	Send local area information	3 days
Deny Application	Deny application follow-up	**Email**	Send regrets	2 days

Event Type	Description	Type	Type Description	Due In
Move In	Move In follow-up	**Email**	Reminder for move-in	15 days before
		Call	Key pick-up arrangements	2 days before
		Email	Welcome to Property packet	1 day
		Call	Move-in survey	30 days
Move Out	Move Out follow-up	**Email**	Send Move-Out Checklist	15 days before
		Call	Schedule walk-through	3 days before
Service Request	Service Request follow-up	**Call**	Satisfaction Survey	1 day

If you do not want to load the set of default templates, you can use the above grid as a reference for adding your own templates. For information about manually adding individual follow-up templates, see "Adding Follow-Up Templates" in the *VoyagerPlus RENTCafé CRM User's Guide*.

After default templates are loaded or added, you can edit them to meet your organizations requirements. For more information about managing existing follow-up templates, see "Reviewing, Editing, and Deleting Follow-Up Templates" in the *VoyagerPlus RENTCafé CRM User's Guide*.

This section includes the following procedures:

To load the default follow-up templates to a property record

1 Open the property record to which you want to load the default follow-up templates. For more information, see "Searching for Records" in the *VoyagerPlus RENTCafé* CRM *User's Guide*. The **Property** screen appears.

2 On the side menu, select **Follow-Up Templates**. The **Follow-Up Templates** screen appears.
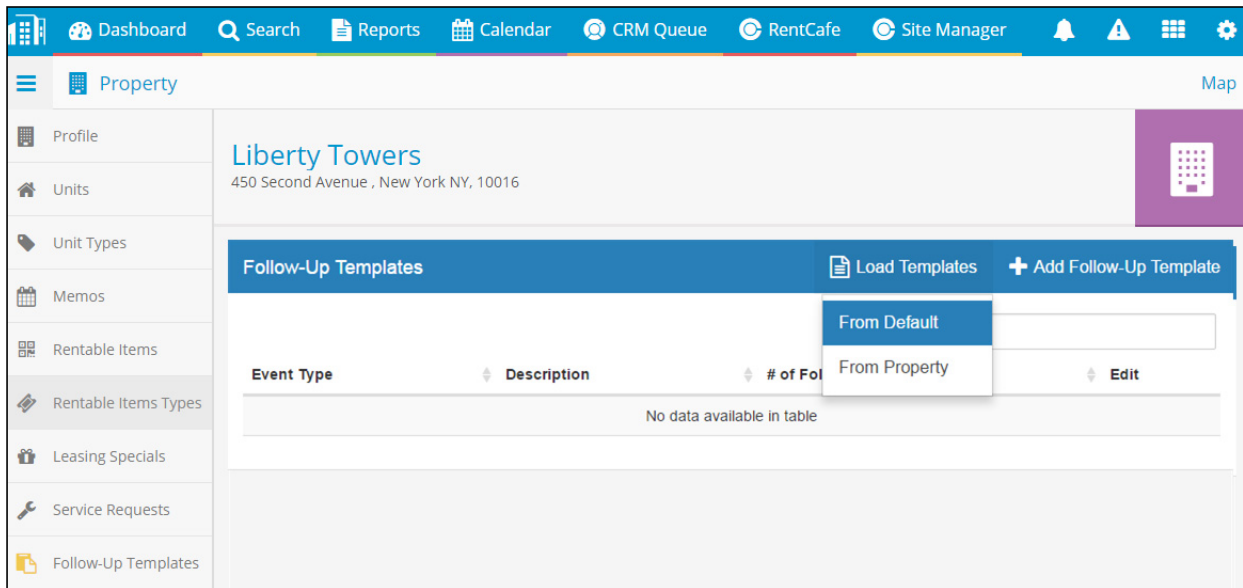
3 From the **Load Templates** menu, select **From Default**. The list of default follow-up templates appear in the grid.

To load follow-up templates from another property

1 Open the property record to which you want to load the default follow-up templates. For more information, see "Searching for Records" in the *VoyagerPlus RENTCafé CRM User's Guide*. The **Property** screen appears.
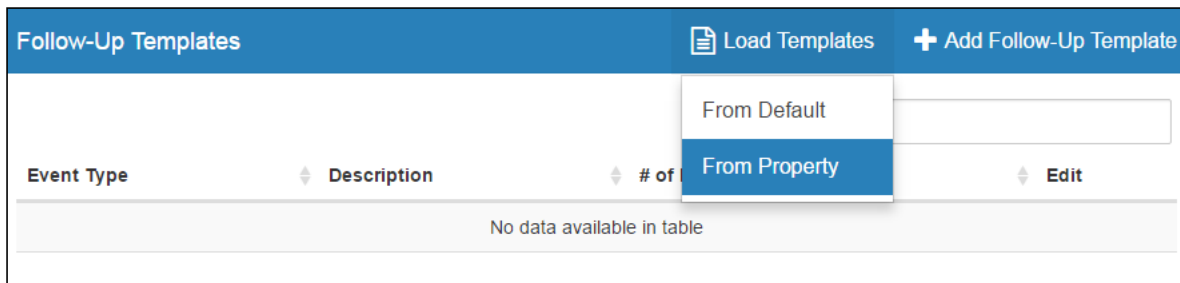
2 On the side menu, select **Follow-Up Templates**. The **Follow-Up Templates** screen appears.
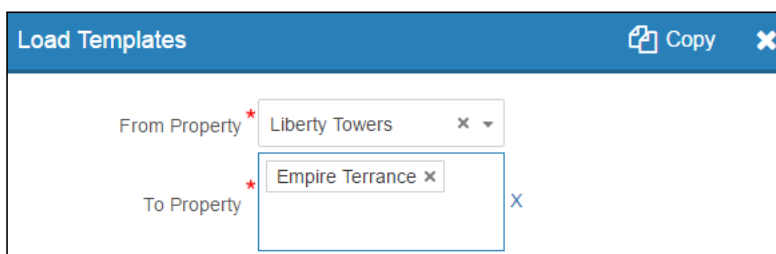

3 From the **Load Templates** menu, select **From Property**. The **Load Templates** screen appears.

4   In the **From Property** field, select the property from which you want to copy follow-up templates, and click **OK**.

5   In the **To Property** field, select the property to which you want to copy the follow-up templates.

6   Click **Copy**.

Enabling and Disabling Follow-Up Templates for Properties

You can enable or disable all follow-up templates for a property at any time.

To enable or disable all follow-up templates for a property

1   Open the record for the property whose follow-up you want to enable or disable. For more information, see "Searching for Records" in the *VoyagerPlus RENTCafé CRM User's Guide.* The **Property** screen appears.

2   On the side menu, select **Profile**, if not already shown. Select the **Setup** tab.

3   In the **Disable Follow-Up Templates** field, select **Yes** or **No**, as needed.

4   Click **Save**.

Automatic Follow-Up Emails

You can configure RENT*Café* CRM to automatically send emails from follow-ups through a TaskRunner task, which you must add and schedule in Voyager.

Schedule the task to run in frequent intervals (15 minutes or shorter recommended). When the task runs, RENT*Café* CRM checks for any overdue follow-ups and sends notification emails. For more information, see the *Voyager Service Manager Administration and Setup Guide*.

Email Theme Setup

This section describes how to add email themes for each of your properties.

For information about adding and managing email templates in RENT*Café* CRM, see "Email Templates" in the *VoyagerPlus RENTCafé CRM User's Guide.*

Setting Up Email Themes

*Email themes* affect the visual layout of the email.

There are two email themes that you can add in RENT*Café* CRM for each of your properties, each corresponding to a type of recipient: Prospect, and Resident. Once you have added the Prospect and Resident email themes, you can neither add more themes nor delete the existing ones.

You can edit email themes. For more information, see "Reviewing, Editing, and Deleting Email Themes" in the *VoyagerPlus RENTCafé CRM User Guide*.

Email themes fully support *tokens*, which you can use to display dynamic text on emails sent from templates. For example, the *^PropertyName^* token displays the name of a recipient's property.

To add an email theme for a property

1   Open the record for the property whose email theme you want to edit. For more information, see "Searching for Records" in the *VoyagerPlus RENTCafé* CRM *User's Guide.* The **Property** screen appears.

2   On the side menu, select **Email Themes**. The **Email Themes** screen appears.
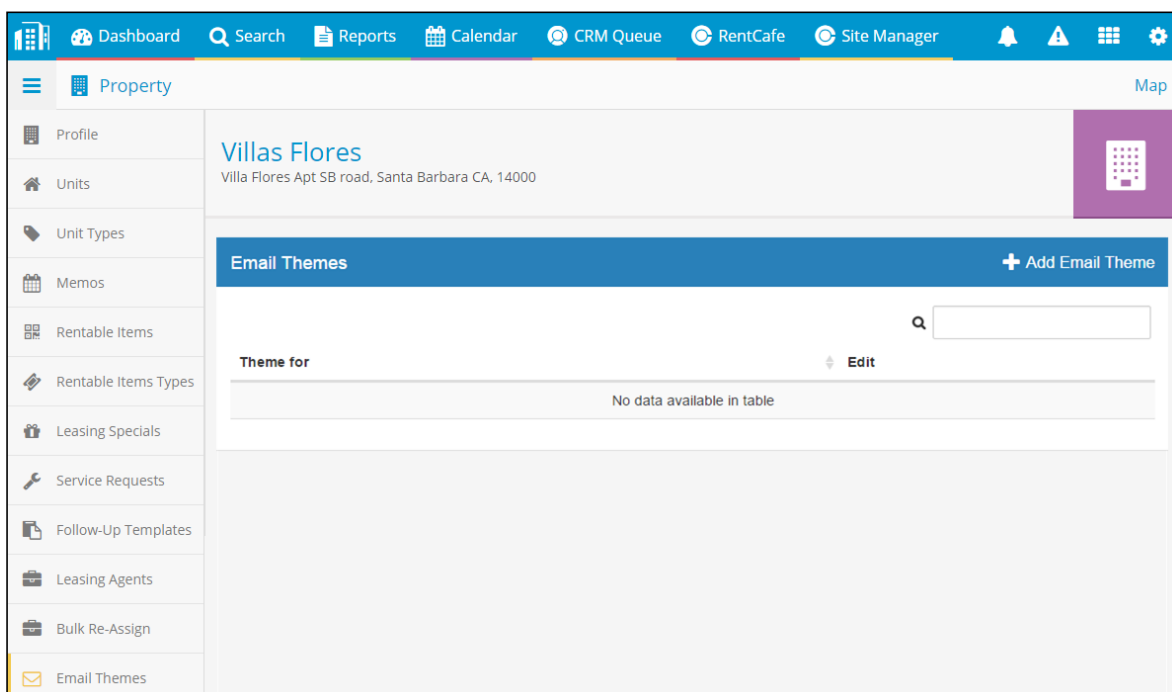
3 For each type of theme (**Prospect** and **Resident**):

    a Click **Add Email Theme**. The **Email Theme Setup** screen appears.
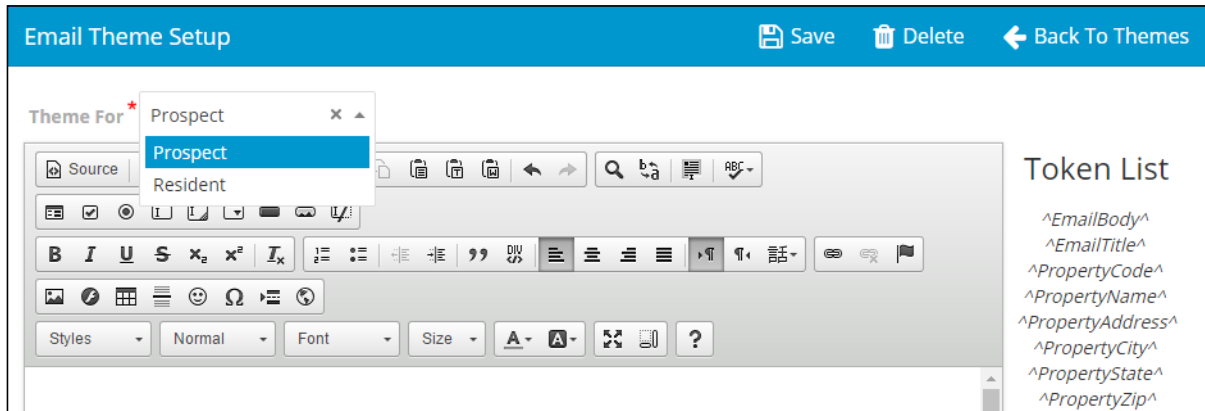
    b In the **Theme For** field, select **Prospect** or **Resident**, depending on which email theme you are adding.

    c Use the content editor to create your theme template.

> To insert a token into the template, copy it from the Token List section and paste it into the body. Include carets (^) at the beginning and end of the token.

    d Click **Save**.

Sister Properties

This section describes how to manage your sister properties in RENT*Café* CRM.

For information about transferring guest records to sister properties, see "Guest Transfer To Sister Properties" in the *VoyagerPlus RENTCafé CRM User's Guide*.

Adding Sister Properties

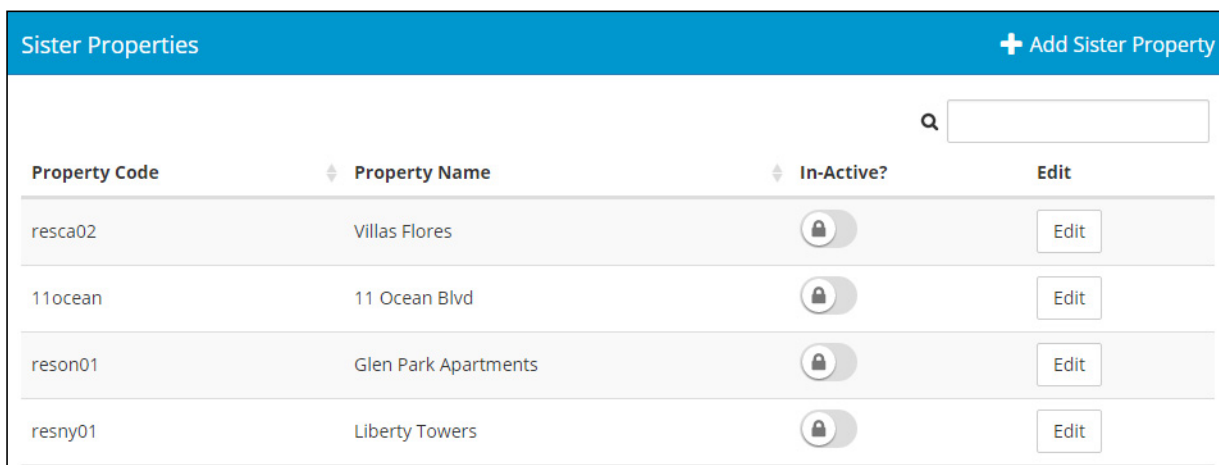A property's *sister properties* are other properties that your company manages within the same market and region.

You can add, review, and edit a property's sister properties at any time. If you no longer want to use a sister property, you can make it inactive.

This section includes the following procedures:

To add a sister property to a property record

1 Open the record for the property to which you want to add a sister property. For more information, see "Searching for Records" in the *RENTCafé CRM User's Guide*. The **Property** screen appears.

2 On the side menu, click **Sister Property**. The **Sister Properties** screen appears.

3 Click **Add Sister Property**. The **Sister Properties for [Property Name] ([code])** screen appears.

4 Complete the screen. For field descriptions, see "Sister Properties for [Property Name] ([code]) Screen Reference" on page 24.

5 Click **Save**.

Sister Properties for [Property Name] ([code]) Screen Reference
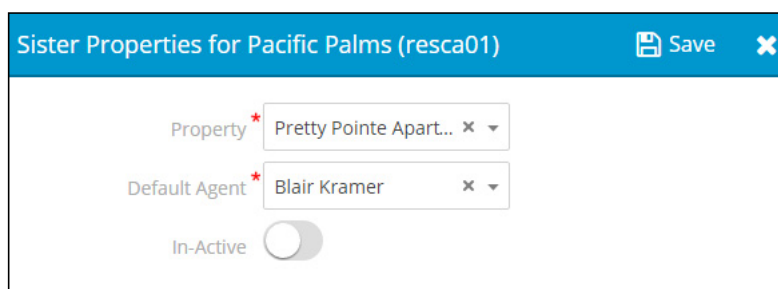
Property	Sister property that you want to add to the property record.
Default Agent	Agent to associate with guests at the sister property. All transfer leads/guest cards from the sister property are assigned to this agent.
Inactive	Determines whether you want to use a sister property or not.

Reviewing, Editing, and Deactivating Sister Properties

You can review, edit, and deactivate a property's sister properties at any time. If you no longer want to use a sister property, you can make it inactive.

To review, edit, or deactivate a sister property from a property record

1 Open the record for the property to which you want to add a sister property. For more information, see "Searching for Records" in the *VoyagerPlus RENTCafé* CRM *User's Guide.* The **Property** record appears.

2 On the side menu, select **Sister Property**. The **Sister Properties** screen appears.

3 In the row corresponding to the sister property that you want to review, edit or deactivate, click **Edit**. The **Sister Properties for [Property Name] ([code])** screen appears.

4 Edit as needed. For field descriptions, see "Sister Properties for [Property Name] ([code]) Screen Reference" on page 24.

5 If you want to deactivate the sister property, select **In-active**.

6 Click **Save**.

Office Hours

This section describes how to set up office hours for your properties in RENT*Café* CRM.

Setting Office Hours

You can set up office hours for a property at any time.

> When office hours are active, follow-ups that are scheduled outside of these hours move to the beginning of the next working day. For example, your daily office hours are 9:00 AM to 5:00 PM. On the First Contact follow-up template for the property, you can schedule a follow-up 4 hours after a guest is added.)

To set the office hours for a property

1 Open the record for the property whose office hours you want to set. For more information, see "Searching for Records" in the *VoyagerPlus RENTCafé CRM User's Guide.* The **Property** screen appears.

2 On the side menu, select **Office Hours**. The **Office Hours** screen for the property appears.

3 For each day's hours that you want to edit:

a Click **Edit**. The **Office Hour** screen appears.

b Complete the fields, and click **Save**.

Lead Scoring Setup and Procedures

This section describes how to set up and use lead scoring in RENT*Café* CRM

Lead Scoring Overview

Lead scoring is a method of prioritizing guest cards by assigning a quantifiable score to each prospect, based on your own criteria. Scores are out of 100, and change color in RENT*Café* CRM based on custom levels that you define. This helps you differentiate between "hot" (warm color) and cold (cool color) "leads" at a glance.

If a large number of prospects contact your properties, your organization probably has some criteria for determining which leads to prioritize over others. For example, if prospects that come from particular marketing sources have historically higher rates of acceptance than others, you might choose to focus your leasing team's efforts on those prospects. Similarly, you might choose to focus on prospects who want to move in within the month.

Lead Score Measures

A *measure* is quantifiable data from guest cards that can be used to help determine the overall lead score. Thus, a prospect's lead score is the sum of their individual measure scores.

Each measure has a *maximum value*, or weight, with the sum of all maximum values totaling to 100. Within each measure, a prospect can score up to the maximum value, depending on their particular circumstances or selected options. Each measure also has a default value for options within it that are not defined.

For example, the **Source** measure might have a maximum value of 20. Prospects whose sources are referrals might receive the full 20 points for the measure, while prospects whose source is the newspaper might receive only 15 of the total 20 points.

RENT*Café* CRM currently includes five measures:

Measure	Description
Source	Marketing source that referred the prospect to the property.
	Prospects referred by sources with historically higher rates of acceptance might receive more points than others.
First Contact	Method by which the prospect first contacted the property.
	Prospects that call the leasing office might receive more points than those who email it.
Expected Move-In	Number of days until the prospect expects to move in, or the number of days past since the day on which the prospect expected to move in.
	Prospects who expect to move in within the month, or are overdue to move in, might receive more points than those who expect to move in six months out.
Lease Term	Numbers of months for which the prospect wants to lease their unit.
	Prospects with 12-month lease terms might receive more points than those with shorter terms.
Lead Stage	Step in the leasing workflow that the prospect is on.
	Prospects who just submitted their applications might receive more points than those who just canceled their applications.

Lead Score Levels

Lead scores are separated into four color-coded levels. The colors include red, orange, blue, and gray.

You can define the *score floor*, or minimum score, for every level except the lowest one. A score belongs to a level when it is above the score floor; otherwise, it belongs to the level below it.

For example, the highest score level has a floor of 80. Any score above 80 belongs to the highest level and will be colored appropriately. Scores of 79 and below belong to the lower levels.

Setting Up Lead Score Levels

You set up lead score levels at the company level. You can set a custom score floor and description for each level, but you cannot change the built-in colors.

To set up lead score levels

1 From the top menu, select **Settings > Lead Score Levels**. The **Lead Score Levels** screen appears.

Lead Score Levels			
Score Floor	**Color**	**Description**	**Edit**
80	Red	Hot	Edit
60	Orange	Warm	Edit
40	Blue	Cool	Edit

2 For each score level you want to use:

a Click the **Edit** button in the row corresponding to the level. The **Lead Score Level** screen appears.

Lead Score Level	💾 Save ✖
Score Floor *	80
Color	Red
Description *	Hot

b Complete the screen, as needed:

Score Floor	Minimum score required to assign a lead to this level.
	Leads with a lower score are assigned to the previous level. Leads with a score lower than the lowest floor are assigned to a default Grey level.
Color	Score level colors cannot currently be changed.
Description	Label for the score level.

c Click **Save**.

Setting Up Default Lead Score Templates

By setting up the company-level default lead score template, you can define your global lead scoring rules, copy the template to your properties, and then make changes on a property-by-property basis.

To set up the default lead score template

1 From the top menu, select **Settings > Lead Score Template**. The **Lead Scoring Default Template** screen appears.

Lead Scoring Default Template		📄 Load Templates to Property
		🔍
Measure	**Weight** ⇕	**Edit**
Source	20	Edit
First Contact	20	Edit
Lease Term	20	Edit
Expected MoveIn	20	Edit
Lead Stage	20	Edit
	100.00	

⚠️ The sum of maximum values for all measures should equal 100. If the sum does not equal 100, a warning message appears on the bottom of the screen.

You can still use lead scoring with a non-100 sum, but some features, such as score levels, might not work properly.

2 For each measure:

   a Click the **Edit** button in the row corresponding to the measure. The measure screen appears.

   b Complete the screen. For field descriptions see:

      ◆ "Source Screen Reference" on page 31.

      ◆ "First Contact Screen Reference" on page 32.

      ◆ "Lease Term Screen Reference" on page 34.

      ◆ "Expected Move-In Screen Reference" on page 33

      ◆ "Lead Stage Screen Reference" on page 35.

   c Click **Save**.

Source Screen Reference

Top part of screen	
Maximum Value	Maximum value for any source.
	The maximum value of any measure must be greater than or equal to 0. The sum of maximum values for all measures should equal 100.
Default Value	Value to assign to a prospect's source when it is not any of the options specified in the **Source** column in the grid below.
Grid	
Source	Source name.
	WARNING At the company-level, the list of sources is hard-coded. If you copy the default template to a property, you must ensure that these sources exist on that property record.
Value	Value to assign to the source.
	You can assign a negative value to reduce the scores of prospects with the source.
Delete	Deletes the source from the grid after your save changes.
	Until you reselect the source in a new row, it will use the default value.

First Contact Screen Reference

Top part of screen	
Maximum Value	Maximum value for any first contact.
	The maximum value of any measure must be greater than or equal to 0. The sum of maximum values for all measures should equal 100.
Default Value	Value to assign to a prospect's first contact type when it is not any of the options specified in the **First Contact** column in the grid below.
Grid	
First Contact	First contact type.
Value	Value to assign to the first contact type.
	You can assign a negative value to reduce the scores of prospects with the first contact type.
Delete	Deletes the first contact type from the grid after you save changes.
	Until you reselect the first contact type in a new row, it will use the default value.

Expected Move-In Screen Reference

Top part of screen

Maximum Value	Maximum value for any expected move-in date.
	The maximum value of any measure must be greater than or equal to 0. The sum of maximum values for all measures should equal 100.
Default Value	Value to assign to a prospect's expected move-in date when it is further in the future than the longest range specified in the **Expected Move-In Date Within** column in the grid below.
	For example, if the longest range specified is 90 days, an expected move-in date 91 days in the future will use the default value.

Grid

Expected Move-In Date	Number of days from the current date (when lead score is calculated) to the expected move-in date.
	You can type a negative number to specify a number of days in the past from the expected move-in date (that is, a scenario in which prospect's expected move-in date has already passed).
	NOTE If a prospect's expected move-in date is in the past and you do not specify a negative number, the assigned value will be either the closest number of days in the future. In the above example, the assigned value for past move-in dates would be 10 (within 5 days).
Value	Value to assign to expected move-in date range.
	You can assign a negative value to reduce the scores of prospects whose move-in dates are within the range.
Delete	Deletes the expected move-in date range from the grid after you save changes.
	Until you retype the expected move-in date range in a new row, it will use the default value.

Lease Term Screen Reference

Top part of screen

Maximum Value	Maximum value for any lease term.
	The maximum value of any measure must be greater than or equal to 0. The sum of maximum values for all measures should equal 100.
Default Value	Value to assign to a prospect's lease term when it is not any the lengths specified in the **Lease Term (In Months)** column in the grid below. This includes lease terms shorter the shortest specified length an d those longer the longest specified length.

Grid

Lease Term (In Months)	Number of months in the lease term.
Value	Value to assign to the lease term.
	You can assign a negative value to reduce the scores of prospects with lease term.
Delete	Deletes the first lease term from the grid after you save changes.
	Until you retype the number of months in the lease term in a new row, it will use the default value.

Lead Stage Screen Reference

Top part of screen	
Maximum Value	Maximum value for any lead stage.
	The maximum value of any measure must be greater than or equal to 0. The sum of maximum values for all measures should equal 100.
Default Value	Value to assign to a prospect's lead stage when it is not any of the options specified in the **Lead Stage** column in the grid below.
Grid	
Lead Stage	Lead stage.
Value	Value to assign to the lead stage. Prospects do not receive points for completing earlier stages.
	You can assign a negative value to reduce the scores of prospects who are on the lead stage.
Delete	Deletes the first contact type from the grid after you save changes.
	Until you reselect the first contact type in a new row, it will use the default value.

Loading Lead Score Templates to Properties

To use lead scoring at a property, you must first load a template to it. You can load the default lead score template, set at the company level, to multiple properties at once or to a single property. You can also load a template from one property to another.

This section includes the following procedures:

To load the default lead score template to multiple properties

1   From the top menu, select **Settings > Lead Score Template**. The **Lead Scoring Default Template** screen appears.
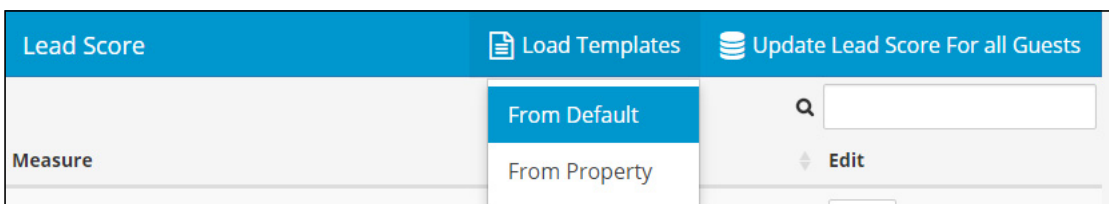

2   Click **Load Templates to Property**. The **Load Template to Property** screen appears.

3   In the blank field, select the properties to which you want to load the default lead score template.

4   Click **Copy**.

**To load the default lead score template to a single property**

1   Open the record of the property to which you want to load a lead score template. For more information, see "Searching for Records" in the *RENTCafé* CRM *User's Guide*. The **Property** screen appears.

2   On the side menu, click **Lead Score**. The **Lead Score** screen appears.


3   From the **Load Templates** menu, select **From Default**.

To load another property's lead score template to a single property

1   Open the record of the target property to which you want to load a lead score template. For more information, see "Searching for Records" in the *RENTCafé* CRM *User's Guide*. The **Property** screen appears.

2   On the side menu, select **Lead Score**. The **Lead Score** screen appears.
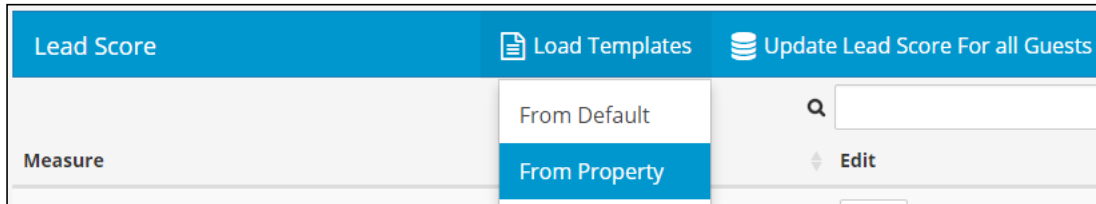
3   From the **Load Templates** menu, select **From Property**. The **Copy Template from Property** screen appears.
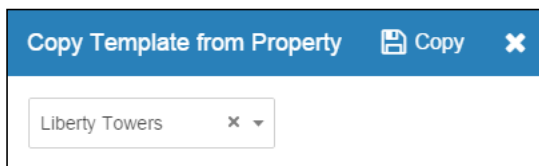
4   In the blank field, select the property with the lead score template that you want to load.

5   Click **Copy**.

Populating Lead Scores

After a lead score template is set up and loaded for a property, you can assign lead scores to prospects who existed before the template was set up. To do this, you can manually update the lead scores for all guests at the property.

⚠️   Lead scores should not be updated for all guests during business hours as this could cause system performance issues.

**To populate lead scores for existing prospects at a property**

1   Open the record of the property with the prospects whose lead scores you want to populate. For more information, see "Searching for Records" in the *RENTCafé CRM User's Guide*. The **Property** screen appears.

2   On the side menu, select **Lead Score**. The **Lead Score** screen appears.

Update Lead Score For All Guests button
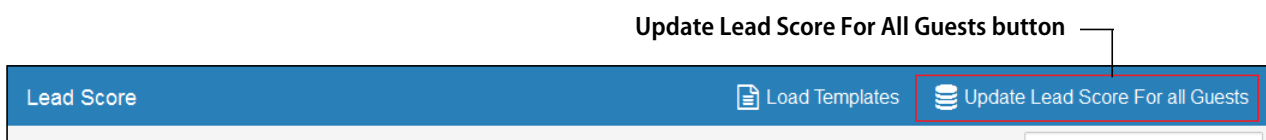
3 Click the **Update Lead Score For All Guests** button. A progress window appears while processing.
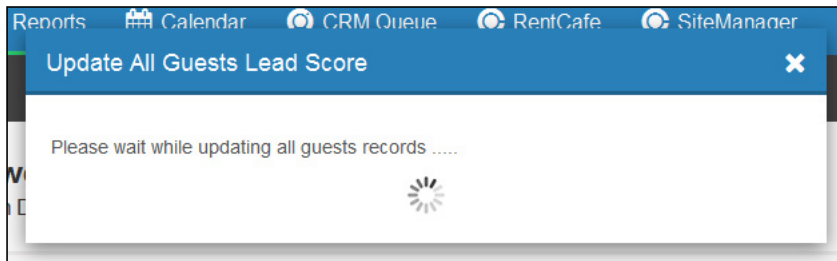
When all records are updated with lead scores, a confirmation message appears.
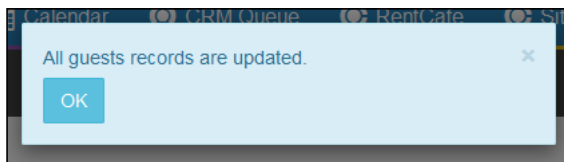
Reviewing and Editing Property Lead Score Templates

After a lead score template is set up and loaded for a property, RENT*Café* CRM automatically assigns lead scores to new prospects and updates them instantly. However, you need to edit the specific lead scoring rules, as needed.

You can review and edit specific lead scoring rules at any time.

To review or edit a property's lead score template

1 Open the record of the property with the lead score template that you want to review. For more information, see "Searching for Records" in the *VoyagerPlus RENTCafé* CRM *User's Guide.* The **Property** screen appears.

2 On the side menu, select **Lead Score**. The **Lead Score** screen appears.

Lead Score			📄 Load Templates	🗄 Update Lead Score For all Guests
			🔍	
Measure		**Weight** ⇕		**Edit**
Source			20	Edit
First Contact			20	Edit
Lease Term			20	Edit
Expected MoveIn			20	Edit
Lead Stage			20	Edit
			100.00	

⚠️ The sum of maximum values for all measures should equal 100. If the sum does not equal 100, a warning message appears on the bottom of the screen.

You can still use lead scoring with a non-100 sum, but some features, such as score levels, might not work properly.

3 If you want to edit a measure:

    a In the row corresponding to the measure, click **Edit**. The screen for that measure appears.

    b Edit as needed. For field descriptions see:

        ◆ "Source Screen Reference" on page 31.

        ◆ "First Contact Screen Reference" on page 32.

        ◆ "Lease Term Screen Reference" on page 34.

        ◆ "Expected Move-In Screen Reference" on page 33.

        ◆ "Lead Stage Screen Reference" on page 35.

    c Click **Save**.

4 If you made changes, click **Update Load Score for All Guests**.