



Merging Guest Cards and Applications in CRM How-To

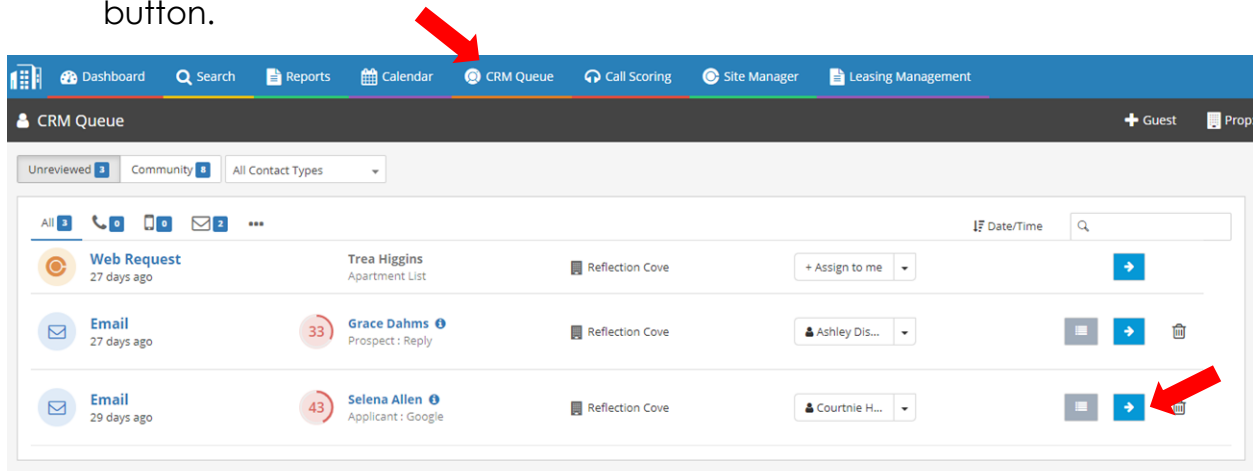
May 2021

Merging Guest Cards:

You can merge multiple guest cards together from the CRM Queue screen. This is helpful if one prospect calls and retains information and then the roommate also calls. Also, this is helpful if two guest cards were entered on the same person, but information was entered correctly (such as phone number, email, or spelling of name).

Option 1:

1. Log into CRM.
2. Select the CRM Queue.
3. Select the prospect that called or emailed and click the blue arrow button.



4. Select all corresponding names that you would like to merge.
5. Select merge guests.

The screenshot shows the Quick Guest form. The form has fields for First Name, Middle Name, Last Name, Preferred Name, Cell Phone, Home Phone, Email, Property, First Contact, Agent, Source, Result, and Date. Below the form is a section titled 'Matched Guests' with a 'Merge Guests' button. A red arrow points to the 'Merge Guests' button. Below this is a table with columns: Select, Property, Unit, Rank %, Name, View, Phone, Email, and Address. The table contains one row for Selena Allen. A red arrow points to the 'Select' checkbox for Selena Allen.

Select	Property	Unit	Rank %	Name	View	Phone	Email	Address
<input checked="" type="checkbox"/>	Reflection Cove	04-4211	88	Selena Allen	View	(573) 289-4296	sallen@hallsville.zzo	Miner Village,Rolla,MO

Option 2:

1. Search for your prospect by entering in one of the following: name, phone number or email.

The screenshot shows the CRM interface with a search bar at the top containing 'selena allen'. Below the search bar, there are two results for Selena Allen. The first result is 'Selena Allen (Prospect)' with details: Reflection Cove - 13992 Reflection Drive, St. Louis, MO 63021, email: sallen@hallsville.zzo, home phone: (573) 289-4296, and expected move-in: 5/20/2021. The second result is 'Selena Allen (Applied)' with details: Reflection Cove, unit 04-4211 - 13992 Reflection Drive, St. Louis, MO 63021, unit type: rcv.a1 (rcv.a1 - 1x1 - 1A), email: sallen@hallsville.zzo, cell phone: (573) 289-4296, home phone: (573) 296-8405, and expected move-in: 6/12/2021. A red arrow points to the search bar.

2. Select Enable Merge Guest

The screenshot shows the CRM interface with the search results for 'selena allen'. At the top right of the results area, there is a toggle switch labeled 'Enable Merge Guest'. A red arrow points to this toggle switch.

3. Select the prospects you want to merge into one guest card.

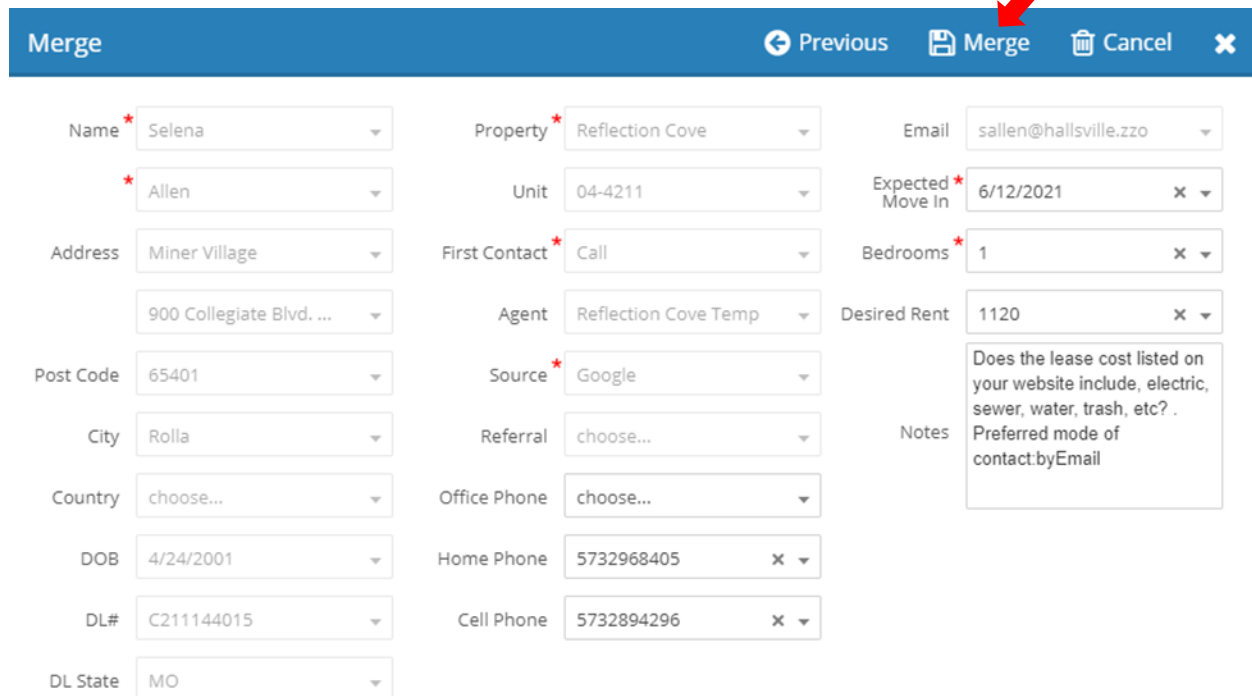
4. Select 'Merge Guest' to push together.

The screenshot shows the CRM interface with the search results for 'selena allen'. At the top right of the results area, there is a button labeled 'Merge Guest'. A red arrow points to this button. On the left side of the results, there are two green circular checkboxes next to the prospect and applied cards, indicating they are selected for merging.

5. Select the guest card you want to keep active in CRM, the other guest card information will merge into the active one.

The screenshot shows a 'Merge' dialog box. At the top, there are buttons for 'Continue', 'Cancel', and a close button. Below these buttons, there is a label 'Merge To' followed by a dropdown menu. The dropdown menu is open, showing 'Selena Allen, Applied, ...'. A red arrow points to the 'Continue' button, and another red arrow points to the 'Merge To' dropdown menu.

6. CRM will show you the information from both guest cards and ask you to select which information is accurate.



Merge Previous Merge Cancel X

Name * Selena Property * Reflection Cove Email sallan@hallsville.zzo

* Allen Unit 04-4211 Expected Move In * 6/12/2021 X

Address Miner Village First Contact * Call Bedrooms * 1 X

900 Collegiate Blvd. ... Agent Reflection Cove Temp Desired Rent 1120 X

Post Code 65401 Source * Google

City Rolla Referral choose... Notes Does the lease cost listed on your website include, electric, sewer, water, trash, etc? . Preferred mode of contact: byEmail

Country choose... Office Phone choose...

DOB 4/24/2001 Home Phone 5732968405 X

DL# C211144015 Cell Phone 5732894296 X

DL State MO

Occupants

Q

Select	Name	Social Security #	Relationship	Lessee
<input checked="" type="checkbox"/>	Scott Allen		Guarantor	Yes

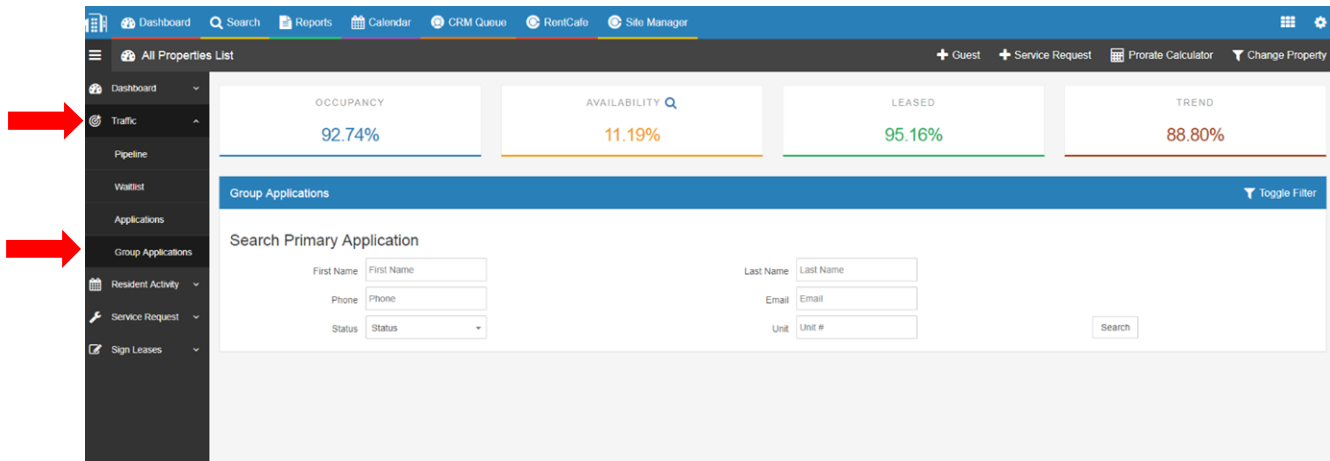
7. Select Merge

NOTE: If you're having issues with merging guest cards, such as information not transferring, double check to make sure your cookies/caches are cleared in the browser you're using. This will help eliminate steps prior to submitting a ticket to Saxony.

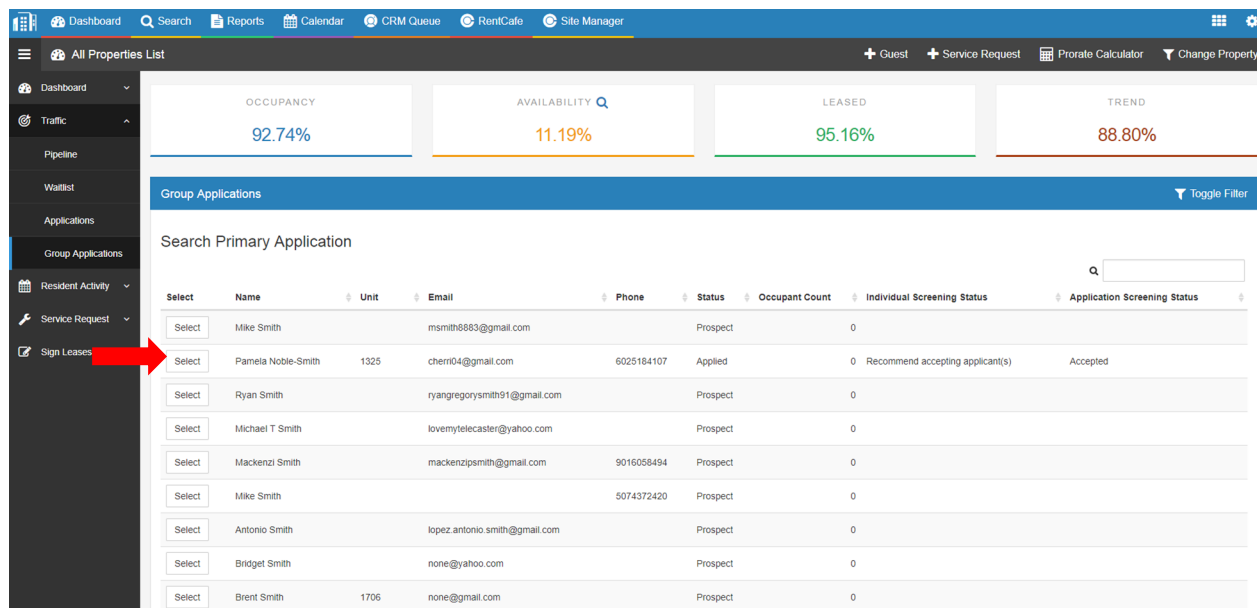
Merging Applications:

You can merge applications and/or guest cards together from the CRM dashboard. This is helpful if the primary completed an application and then the roommate did a separate application.

1. Log into CRM.
2. On the left side of your screen click on Traffic and select Group Applications.



3. Enter the primary applicants name and click search.
4. Select the applicant and/or prospect you are searching for by pressing the Select button.



5. On the top right side click on Add Occupants/Applicants.

The screenshot shows a dashboard with four metrics: OCCUPANCY (92.74%), AVAILABILITY (11.19%), LEASED (95.16%), and TREND (88.80%). Below these is a 'Group Applications' section with a '+ Add Occupants/Applicants' button highlighted by a red arrow. The 'Add/Edit Applicants' table shows one entry: Mike Smith, msmith8883@gmail.com, Prospect, Primary.

6. Enter the other applicants and/or prospects name and click on Search.

7. Select the applicant you are searching for by pressing on Add To Group

NOTE: You can only merge one person at a time. You can repeat this step as many times as needed.

The screenshot shows the 'Group Applications' section with a 'Toggle Filter' button. Below the table, there is a 'Search Additional Occupant/Applicant' section. The 'Add To Group' button is highlighted by a red arrow. The table lists several applicants with their names, emails, and relationships. The 'Primary' relationship for Janelle Smith is highlighted with a red box.

8. You will need to select:

- relationship type (spouse, roommate, guarantor)
- how you would like to report the guest as (applicant grouping, duplicate)
- agent completing the task (yourself).

9. Once these steps have been completed, click on Update in the top right corner

Dashboard Search Reports Calendar CRM Queue RentCafe Site Manager

All Properties List + Guest + Service Request Prorate Calculator Change Property

OCCUPANCY 92.74% AVAILABILITY 11.19% LEASED 95.16% TREND 88.80%

Group Applications Update

Occupant/Applicant To Be Added To Application

Relationship First Name Last Name Email Phone Status Date Of Birth Voyager Code

Roommate Janelle Smith janelle.smith47@yahoo.com Prospect

How would you like to report Cancel Guest as? Applicant Grouping

Agent Devin Snipes

NOTE: If you have added someone by mistake you are able to remove them by selecting remove.