

This document should be able to answer the following questions:

- Which data fields/tables we pull and when
- Which data fields we push and when
- Triggers in LeadManaging (LM) that initiate data transfer to Property Vista (PV)
- Triggers in Property Vista (PV) that initiate data transfer to LeadManaging (LM)
- Triggers in PV that initiate the data push to Yardi

Export

- LM pushes guest cards to PV
- Frequency and timing:
 - Within 5 minutes after manually pushing a guest card
- PV pushes Approved Lease Application details to Yardi in Real time

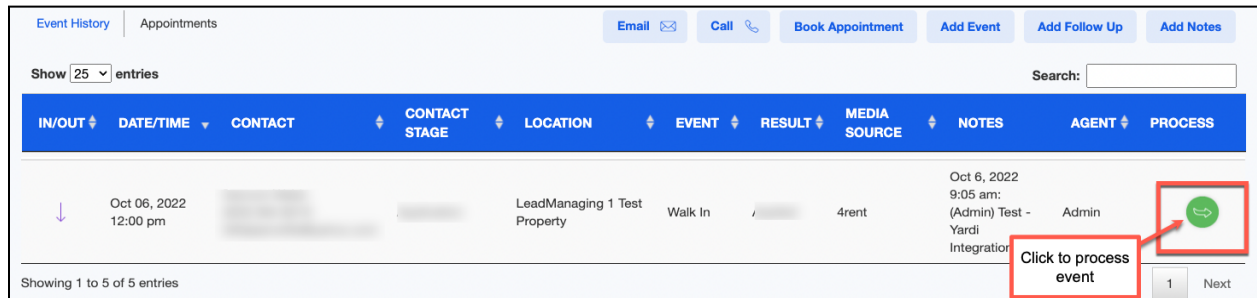
Workflow: Export/Push Guest Card From LM to PV:

In order to successfully push a guest card into PV, the following fields within LM should always be filled out:

1. First name (**Mandatory**)
2. Last name (Optional)
3. Phone Number **or** Email Address
4. Bedroom Type
5. Move-In Date

The screenshot displays a web form for a lead in LeadManaging. At the top, there are three dropdown menus: 'Contact Stage' (Application), 'Contact Persona' (None selected), and 'Originating Source' (4rent). Below these is a 'Contact Details' section with fields for 'First Name', 'Last Name', 'Phone', 'Allow SMS' (checkbox), and 'Email'. The 'Leasing Preferences' section includes 'Bedroom Type' (1 Bedroom 1 Br), 'Move In Date' (December 1, 2022), 'Do you have pets?' (dropdown), 'Custom Checkbox' (None selected), and 'Do you Currently Rent or Own?' (dropdown). Red boxes are drawn around the 'First Name', 'Last Name', 'Phone', 'Email', 'Bedroom Type', and 'Move In Date' fields to indicate they are mandatory for export.


Once the fields are correctly filled out, you will then be able to push the guest card to PV by processing an event under the Event History section of your guest card:



Event History | Appointments

Email Call Book Appointment Add Event Add Follow Up Add Notes

Show 25 entries Search:

IN/OUT	DATE/TIME	CONTACT	CONTACT STAGE	LOCATION	EVENT	RESULT	MEDIA SOURCE	NOTES	AGENT	PROCESS
↓	Oct 06, 2022 12:00 pm			LeadManaging 1 Test Property	Walk In	/	4rent	Oct 6, 2022 9:05 am: (Admin) Test - Yardi Integration	Admin	

Showing 1 to 5 of 5 entries

1 Next

Click to process event

Important to Note: Appointment events cannot be used to push a guest card to PV.

Within the “Quick Event Update” window, please ensure to select “Application” in the “Contact Stage” field and “Applied” in the “Result” field because that is the only stage and result that will allow you to successfully push to PV. Once all the other fields reflect the appropriate information, please click save:

Quick Event Update ✕

[Event Details](#) [Notes](#)

Damont Webb (Walk In) for LeadManaging 1 Test Property

Oct 06, 2022 12:00 pm

Agent
Admin

Contact Stage Application **Result** Applied

Location LeadManaging 2 Test Property **Desired Suite Type** ut000984-101 1 Bedroom 1 Bath (1 bdrm)

Media Source 4rent

[Check other To Do events from Damont Webb](#)

[Save](#)

Upon clicking save you will be sent to the final step of the push which is to confirm which building/property (and sub property, if you have this building configuration set up within your account) you would like to see within PV.

Please Confirm ✕

By updating the result to Applied, the contact stage will be updated to Application to move this contact to the next stage in their leasing journey!

Building *
LeadManaging 1 Test Property ▾

Push to 3rd party

Sub Property
LeadManaging 2 Test Property ▾

Bedroom *
ut000984-101 1 Bedroom 1 Bath ▾

Cancel Confirm

Upon clicking confirm, the system will confirm that your guest card has been successfully sent to PV.

Info!

Pushed Successfully to Third Party.

Okay

In PV, your guest card will appear as a Lead in the Marketing & Rentals > Leads > Leads table.

LEAD ID	GUESTS	MOVE IN DATE	LEASE TERM	BUILDING	FLOORPLAN	AGENT	CREATE DATE	STATUS
15							11/21/2022	Converted
14							11/21/2022	Converted
13	Chadwick Bowsman	11/21/2022	12				11/21/2022	Submitted
12	Bruce Banner	11/21/2022	12				11/21/2022	Submitted
11	Bruce Banner	11/19/2022	12				11/21/2022	Submitted
10	Hawk Eye	11/21/2022	12				11/21/2022	Submitted
9	Billiejean Webb	12/01/2022	12				11/21/2022	Submitted
8	Tony Stark	11/18/2022	12				11/21/2022	Submitted
7	Tom Holland	11/21/2022	12				11/21/2022	Submitted
6	Bruce Banner	11/21/2022	12				11/19/2022	Closed
5	Wanda Maximoff	11/18/2022	12				11/18/2022	Converted
4	Natasha Romanova	11/19/2022	12				11/18/2022	Converted
3	Prasanna Thyageswaran	11/17/2022	12				11/18/2022	Converted
2	Bruce Banner	11/19/2022	12				11/18/2022	Converted

Clicking on the Lead's name will show the information about the lead as well as the comments from LM.

Import

- Existing feature: *LM pulls Yardi information*
- **Limitation: LM does not pull Guest Card information from Property Vista as of this time. The information reflected comes from Yardi.**

- Prerequisite: LM does not pull Guest Cards from Yardi if they do not have at least 1 form of contact information (email or phone number).
- Frequency and Timing:
 - Every 30 mins - Customer Details (New Leads and updating status of leads)
 - 12 pm and 12 am Eastern - Property Information (units, bedroom types, building, etc.), Ad Sources, and Agent Information
 - Note: If a lead comes in and the building has not been synced from Yardi, the lead will not be processed until we pull the building information from Yardi (at 12 pm or 12 am).

PV to Yardi Export:

Once a Lead is imported into PV CRM, to proceed further the Agent information will need to be filled out as this does not get imported from LM. After this step, the user can convert this Lead into a Lease Application

The screenshot displays the Property Vista CRM interface. On the left is a sidebar with navigation menus including 'Dashboards', 'Properties', 'Marketing & Rentals', and 'Leads'. The main content area is titled 'MARKETING & RENTALS / LEADS / LEADS' and shows a lead record for 'Lead: 11/21/2022, 12, Residential'. The lead details are as follows:

GUESTS		DETAILS		APPOINTMENTS		SHOWINGS	
Lead ID	13	Lease Type	Residential	Building	p0000382_RoyalMissionApartments	Floorplan	Agent
Move In Date	11/21/2022	Lease Term	12				

Below the lead details, there are sections for 'PREFERRED APPOINTMENT TIMES' and 'SEEN AND INTERESTED UNITS'. The 'SEEN AND INTERESTED UNITS' section shows a table with columns for 'Number', 'Floorplan', and 'Building', and a note stating 'Guest(s) has not shown interest in any Unit?'. An 'Actions' dropdown menu is open on the right, showing options to 'Convert to Application' and 'Convert to Lease'.

After the Lead is converted into an Application it will be displayed in the Lease Applications lister. From here, the User can take one of the following steps to proceed;

- Click on Actions – Online Application – Start
- Click on Actions – Submit Application by filling in the reason – Complete – Approve Application

Once this Application is approved it will be moved into the Lease Lister in PV and will be updated real time in Yardi. **Important Note:** Yardi to PV sync does not happen real time and any updates will move into PV only after the nightly sync.

LeadManaging and Yardi Integration

Category	Fields in Yardi (non-customer facing)	Fields in LM (UI)	Notes
Unit	Unit ID	Unit (DB) → Building (UI)	Unit ID in Yardi is mapped to LM DB as Unit and LM UI as Building.
Bedroom Type	Unit ID with Bedroom Type	Description of the Unit (Bedroom Type) ex: 1 Bedroom with balcony (1 bdrm)	
Date/Time	Event Date	Date/Time	First Contact event date and time

Category	Fields in Yardi (non-customer facing)	Fields in LM (UI)	Notes
Contact Info	Customer P-Code (non-customer facing) <ul style="list-style-type: none"> • FirstName, Last Name • Address • Phone Number (Types: Home, Office, and Cell) 	Contact <ul style="list-style-type: none"> • Contact FirstName, LastName • No Address field in LM in the UI or DB (but is sent by Yardi) • Phone Number Types: Day <ul style="list-style-type: none"> ○ Cell ○ Office ○ Home • and Evening <ul style="list-style-type: none"> ○ Cell ○ Home ○ Office 	If Phone Number OR Email Address do not match - LM creates a new contact then later on merges the contact.
Target Move-in Date	Target Move-in Date	Move-in Date	Before the prospect's application
Expected Move-in Date	Expected Move-in Date	N/A	For an existing guest card in LM, once the status changes to Leased in Yardi, LM will update the status of the Guest Card to Leased and reflect the expected move-in date in LM.
Lease from	Lease from	N/A	Not a lead that is created in LM.

Category	Fields in Yardi (non-customer facing)	Fields in LM (UI)	Notes
Lease to	Lease to	N/A	Not a lead that is created in LM.
Desired Floor Plan	Desired Floor Plan	N/A	Not a lead that is created in LM.
Desired Unit (UnitID)	Desired Unit (UnitID)	Unit	
Desired Rent Value	Desired Rent Value	N/A	Not a lead that is created in LM.
Comment	Comment	Remarks	
Agent Info	Agent (FirstName LastName)	Agent Name (FirstName LastName)	In case LM does not have a match from Yardi, LM uses a Default Agent.
Event Type	Event Type	Event Type and Lead Type	
	Email	Email	
	Walk-in	Walk-in	
	Call to Prospect	Call Event	

Category	Fields in Yardi (non-customer facing)	Fields in LM (UI)	Notes
	Call from Prospect <hr/> Other		
Contact Stage	Event Types <ul style="list-style-type: none"> • Application • LeaseSign 	Contact Stage: <ul style="list-style-type: none"> • Applied • Leased 	Yardi does not send LM Guest Card statuses. LM updates Guest Card statuses from Yardi Event Types. <ul style="list-style-type: none"> • We do not capture these from Yardi: Not signed, denied, closed, etc. Leasing agent has to manually update these in LM. [Future enhancement]

Category	Fields in Yardi (non-customer facing)	Fields in LM (UI)	Notes
Ad Source	Transaction Source	Media Source or Originating Source	<p>If the source is not mapped between Yardi and LM, LM will show this source as “No Media Found.” We need to make sure that the source is listed in both LM and Yardi to reflect accurate information.</p> <p>[Future enhancement: categorized mapping ex: source is not exactly mapped with LM, this will be moved to a generic media source]</p>
Unit Availability	Occupancy > Status <ul style="list-style-type: none"> • Vacant • Occupied 	Available: <ul style="list-style-type: none"> • Yes • No 	This is not included in the Guest Card but can be found on LM > Settings > Availability.
Price	Unit Rent	Price (no specific currency, just numbers)	This is not included in the Guest Card but can be found on LM > Settings > Availability.