

# QUICK REFERENCE GUIDE

SOP 1.3 — Leasing Velocity & CRM / Guest Card (AppFolio)

**Who this is for:** Onsite Manager (OSM) — this is your daily operating standard for all leasing activity.  
**The core rule:** Every call, email, and walk-in gets a guest card. Assigned. Followed up on. Every time.

## Your Daily CRM Routine

- Open AppFolio CRM first thing — before emails, before anything else
- Review all new inquiries received since last check — assign each one immediately
- Follow up on all open leads that are due for contact today
- Log every contact attempt in the guest card notes (call, text, email, voicemail)
- Update guest card statuses — move leads forward or mark as lost with a reason
- Create a guest card for any walk-in or phone call that came in — do not skip this step
- End of day: no lead should be unassigned or sitting without a logged follow-up

## Creating a Guest Card — Required Fields

- Prospect first and last name
- Contact information (phone and/or email)
- Inquiry source (how they found you — ILS, walk-in, referral, phone, etc.)
- Unit type or floorplan of interest
- Desired move-in date
- Assigned leasing agent
- Initial follow-up date set
- Notes from first contact logged

## Weekly Rhythm

Day / Time	Who	Action
<b>Daily</b> All day	<b>OSM</b>	Log all traffic, assign all leads, follow up on open guest cards
<b>Friday</b> By EOB	<b>OSM</b>	All guest cards current — statuses updated, follow-ups logged, no unassigned leads
<b>Friday</b> By EOB	<b>AM</b>	AM reviews all CRM activity and follows up on gaps
<b>Monday</b> Before 2:45 PM	<b>AM</b>	For assets >10% availability: AM reviews CRM to prepare for leasing call
<b>Monday</b> 2:45 PM	<b>CC + AM</b>	Leasing Funnel Report reviewed. Pricing and marketing decisions made based on pipeline data

## Why Your CRM Work Matters — The Monday Connection

- Every Monday at 2:45 PM, CC and AM review the AppFolio Leasing Funnel Report.
- This is where decisions are made about rent pricing and marketing strategy for your property.
- The Leasing Funnel Report is only as accurate as the guest cards you create and maintain.
- Missing leads, unassigned cards, or no follow-up = a report that does not reflect reality.
- When leadership cannot see true pipeline activity, they cannot make informed decisions to help your property lease faster.

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SOP 1.3 — AppFolio Training Resources

## AppFolio Training & Help Resources

Use the links below to access official AppFolio training. These resources are maintained by AppFolio and are the best starting point for learning the CRM, guest cards, and leasing tools.

Resource	What it covers
<b>How to Manually Enter a Guest Card</b> <a href="#">Open in AppFolio →</a>	Step-by-step guide for creating a guest card in AppFolio for walk-ins, phone calls, and any prospect not captured automatically.
<b>The Onsite Leasing CRM</b> <a href="#">Open in AppFolio →</a>	Overview of the AppFolio leasing CRM — how the pipeline works, how to manage leads, assign follow-ups, and track prospect status.
<b>Leasing Performer — Getting Started</b> <a href="#">Open in AppFolio →</a>	Introduction to AppFolio's Leasing Performer tools. Covers how leasing activity feeds into reporting and how to use the leasing dashboard effectively.

## Common Mistakes — Avoid These

- Not creating a guest card for a walk-in because "it was a quick conversation"
- Logging a phone inquiry as a note somewhere other than AppFolio
- Leaving a guest card unassigned — every card must have an owner
- Not logging follow-up attempts — if it is not in AppFolio, it did not happen
- Leaving guest card status unchanged for days or weeks
- Closing a lead as lost without logging the reason
- Only updating the CRM right before the AM visit or Friday deadline

## Guest Card Status Guide — Keep These Current

Status	When to use it
<b>New Inquiry</b>	Prospect has just contacted us — not yet reached or toured
<b>Contacted</b>	We have spoken with them — follow-up is active
<b>Tour Scheduled</b>	Tour is booked — confirm 24 hrs before
<b>Toured</b>	Tour completed — application follow-up in progress
<b>Applied</b>	Application submitted — processing underway
<b>Leased</b>	Lease signed — move-in confirmed
<b>Lost</b>	Prospect is no longer interested — log the reason before closing

## Notes / Action Items