Standard Operating Procedure (SOP): Entering a New Lead in Entrata CRM

This is a step-by-step manual to ensure consistent, accurate, and timely entry of new leasing leads into Entrata CRM for effective follow-up and tracking.

This procedure applies to all leasing agents, property managers, and team members responsible for handling prospect inquiries and walk-ins.

1. Login:
    - Go to your Entrata portal: [https://www.entrata.com]
    - Enter your credentials and log in.

2. Access CRM Dashboard:
    - From the left-hand menu, click on CRM
    - Select “Leads” or “Prospects”

3. Add a New Lead:
    - Click the “+ New Lead” or “Add Prospect” button, usually located at the top-right of the Leads dashboard.

4. Enter Lead Information:
    - Fill in the lead details as completely as possible to ensure a proper follow-up will be able to be completed:
    - Basic Information
        - First Name
        - Last Name
        - Phone Number
        - Email Address

    - Lead Source
        - Select the MOST accurate Lead Source (e.g., Walk-in, Website, ILS like Apartments.com, Referral, etc.)
        - If applicable, add the Sub-Source for more detail.
        - Phone Number
    - Property Information:
        - Interested Property (if the CRM holds more than one property)
        - Desired Move-in Date
        - Bedroom/Bathroom Preference
        - Budget Range

    - Additional Notes
        - Add any preferences, questions, or special requests.
        - Use the “Notes” section to log initial contact details or important context.

5. Schedule Follow-Up:
    - Set a “Follow-Up Date” based on the conversation or standard company policy (24 - 48 hour window).
    - Assign follow-up to a team member, if necessary.

6. Save Lead
    - Click “Save” or “Submit” to finalize the entry.

7. Confirm Entry
    - Verify the lead appears in the CRM dashboard- under the “New Leads” Tab.
    - Ensure contact details and notes are accurately saved.

Quality Checks:
- Double-check for duplicate leads.
- Verify phone number and email format.
- Confirm that the lead source is correctly categorized.

Best Practices:
- Take the iPad along on the tour to gather the above information in a personable manner.
- Always ask the prospect for their preferred method of contact.
- Log every interaction (calls, emails, texts) in the lead’s activity timeline.
- Update the lead status as they move through the leasing funnel (e.g., Toured, Application Submitted, Leased).

Compliance:
- Ensure compliance with Fair Housing regulations and your company’s privacy and data retention policies when collecting and storing prospect data.