

CALLTRACKING USER GUIDE

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Using CallTracking

Introduction

CallTracking is a powerful, analytical tool that captures and organizes telephone data. Working behind the scenes, CallTracking silently compiles call information and even records telephone interaction. CallTracking allows property managers to measure how many telephone calls an advertisement generates, how employees are interacting with callers, where calls are coming from, who is calling, and even more through an easy-to-use web-based interface.

See which ads are working and which ones aren't. See who called, the caller's address, and any other available information. See how long the call lasted and listen to the recorded conversation. View instantly accessible reports showing how much leads are costing, where customers are calling from, and how many positive leads an ad generated—assisting you to maximize return on your advertising costs. When combined with Entrata's other lead management tools, CallTracking allows leasing agents to hone their skills and perform their tasks more effectively, thus increasing their leasing numbers.

Using Call Tracking

- Go to: Leads >> Call Tracker Logs
1. The options at the top of your screen will allow you to select calls in bulk or archive calls. You may also download or refresh your view to see current calls, archived calls, or all calls.
 2. Using the the drop-down menu in the **Result** column, you may select the result of the phone call.
 3. Calls will show as **Answered**, **Unanswered**, or **Call Failed** in the **Call Status** column.
 4. Click on a caller to open the View Call Association window.



- If the caller has been identified as a current lead, clicking on the caller will open the lead's profile.
- If the caller has been identified as a current resident, clicking on the caller will open the resident's profile.

Associated Products:
Call Tracking™

| ID | CALLER | PROPERTY | CALL STATUS | SOURCE | RECEIVED | RESULT |
|----------|----------------|------------------------------------|-------------|---|-------------------------|---------|
| 16840686 | (559) 692-6460 | Huntington Place (559) 654-9874 | Unanswered | Call Tracker Lead Unknown 559) 242-0550 | Jan 5 12:26 pm (MST) | Unknown |
| 16781934 | (559) 491-8810 | Huntington Place (559) 654-9874 | Unanswered | Call Tracker Lead Unknown 559) 242-0550 | Jan 3 05:35 pm (MST) | Unknown |

5. If the call was answered, you can listen to a recording of the call and perform an action.

- a. Click the play icon . The View Call Association window will appear.
- b. In the View Call Association window, the recorded call will begin playing.
- c. Select a Call Action from the drop-down menu. Your possible actions are to Create Lead, Create Work Order, Attach to Existing Lead, Attach to an Existing Resident, or Dismiss/Archive.
- d. Provide any relevant notes if necessary.

 If you click on the play icon  from a lead or resident in My Dashboard, the View Call Association window is renamed the Call Action Window. However, the functionality of the window remains the same.

 You can require notes by going to Setup >> Properties >> [select a property] >> Communication >> Call Handling >> Call Tracking >> Call Tracking Preferences and turning on the setting to Require a Note When Submitting a Call Action.

6. Click Continue. You will be directed to an area of Entrata, which corresponds with the call action you selected, where you can complete the call action.

View Call Association ✕

Call ID: 16840686

* Call Action:

Call Notes:

Continue or Cancel

Managing Greetings and Vanity Numbers

In this article:

- [Setting Up Greetings](#)
- [Setting Up Vanity Numbers](#)

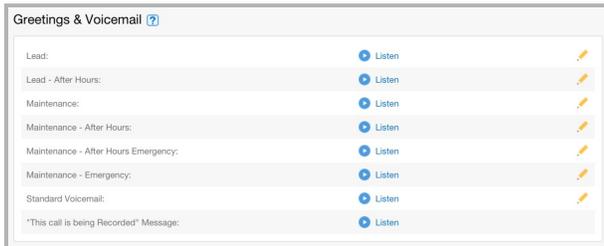
Setting Up Greetings

When prospects call in to a property, the first thing they will hear is the greeting. It will then ring the properties' phones and a leasing agent will have a chance to answer it. Pre-recorded, default greetings are provided by Entrata, but you can customize and record your own using the following steps.

To create a new greeting:

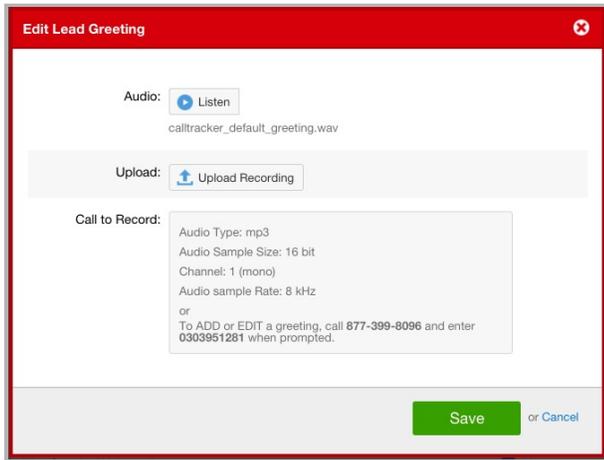
- Go to: Setup >> Properties >> [select a property] >> Property >> General >> Contact Methods >> Greetings & Voicemail

1. Under **Greetings & Voicemails**, select a greeting from the list and then click the edit icon .



2. In the Edit Lead Greeting window,  Upload Recording of a prerecorded mp3 greeting, or in the **Call to Record** section, follow the instructions to record a custom greeting.
3. Click **Save** when you are done.

Associated Products:
CallTracking™



Setting Up Vanity Numbers

In this section:

- [Purchasing and Assigning Vanity Numbers](#)
- [Testing Vanity Numbers](#)
- [Editing and Deleting Vanity Numbers](#)

Purchasing and Assigning Vanity Numbers

CallTracking supports an unlimited amount of vanity numbers to ensure all of your lead sources can be accurately tracked.

To purchase a vanity number and assign it to a lead source:

- Go to: Setup >> Properties >> [select a property] >> Property >> General >> Contact Methods >> Vanity Phone Numbers

1. In the Vanity Numbers section, click  Request Vanity Number.

| Vanity Phone Numbers ? | | | |  Request Vanity Number |
|--|-------------|-----------|---|---|
| Phone Number | Type | Toll Free | Status | |
| 555-555-3063 | Office | Yes |  |  |
| 844-555-9531 | Maintenance | Yes |  |  |
| 801-555-9375 | Lead | No |  |  |

2. Select a **Phone Number Type** from the drop-down menu and indicate whether the number will be **Toll-Free**. If the number is not toll-free, you must enter an **Area Code**. You can choose where to have the number point/assigned to – either the office contacts or to a specific number in the **Point To** drop-down menu.
3. Click **Submit Request**.

4. You will see a list of phone numbers. Click the **Buy Now** checkbox next to the local or toll free phone number(s) you would like to buy and select **Submit**. You will be prompted to confirm that you want to purchase the vanity number.

5. Click **Okay** in the confirmation window.

i Back in the Vanity Phone Numbers section of property settings, the phone number will display a yellow caution icon until configuration is complete. This means the test call to the vanity number is scheduled or in progress.

When the configuration is complete, the number will display a green check mark icon, because the test call to the vanity number was answered.

If the configuration fails, it will display a red icon which means the test call to the vanity number was not answered.

Testing Vanity Numbers

- Go to: Setup >> Properties >> [select a property] >> Property >> General >> Contact Methods >> Vanity Phone Numbers

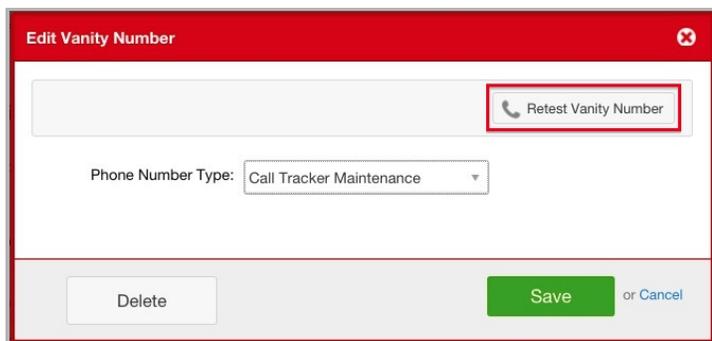
i Vanity Number Statuses

- ✓** Green
Validated (Test call was answered)

You can test vanity numbers by clicking on the edit icon  next to a vanity number and selecting **Retest Vanity Number** from the Edit Vanity Number window.

In order to validate a vanity number, CallTracking places a test call out to the vanity number. When you click test/re-test for a number, the number is automatically dialed through the system in the next 10 minutes.

When the call is placed and CallTracking detects an answer (a real person or a machine), it will hang up and mark the number as validated. If it never receives an answer, the number will be marked as failing validation.



 To increase the likelihood of the test call getting answered:

- Make sure that the property knows a test call will be coming in the next 10 minutes and it needs to be answered.
- Use the voicemail feature, which will ensure the call is answered if no one at the property answers the phone. The setting is in **Setup >> Properties >> [select a property] >> Communication >> Call Handling >> Call Tracking >> Activate Entrata Voicemail.**
- If you do not want to use the voicemail, a different option is to have a third party answering machine. To ensure you give the machine sufficient time to answer the call, change the **Answer Delay Seconds** field to 30 or greater. This will make the call ring for at least 30 seconds before it gives up. This setting is located in **Setup >> Properties >> [select a property] >> Communication >> Call Handling >> Call Tracking >> Answer Delay (Seconds).**
- If the property has the Leasing Center product, they can set it so unanswered calls forward to the leasing center. When someone at the leasing center answers, the number will be marked as validated.

Editing and Deleting Vanity Numbers

You may wish to edit or delete a vanity number to a different lead source or change its type.

To change a vanity number's type:

 **Yellow**

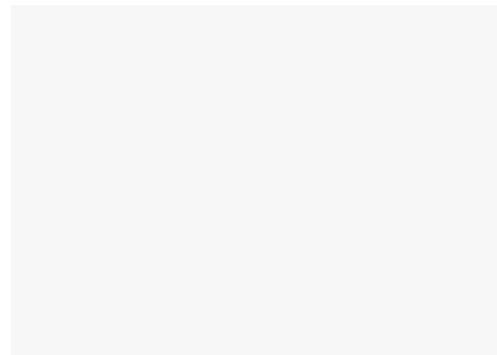
In Progress (Test call is scheduled or in progress)

 **Red**

Failed Validation (Test call was not answered)

- Go to: Setup >> Properties >> [select a property] >> Property >> General >> Contact Methods >> Vanity Phone Numbers.

1. Click the edit icon  next to the vanity number you would like to edit.
2. From the Edit Vanity Number window, you are able change the **Phone Number Type** or **Delete** the vanity number.



Call Tracking Reports & Settings

Reports

Entrata has robust reporting options. Reports become available depending on which Entrata products you have enabled. This is a list of reports associated with CallTracking.

- Go to: Reports >> Communications >> Call Tracker

Calls By Lead Source: The Calls By Lead Source report counts which lead sources are being used the most when a caller calls the property.

Call Setting Changes:

Calls Tracking Accessed Recordings: Calls Tracking Accessed Recordings report shows by property which calls have been archived and for what reason they were archived

Call Tracking - Call Logs:

On Site Call Breakdown: The On Site Call Breakdown report shows the breakdown of calls and the result of those calls with the CallTracking product.

Property Call Conversion: The Property Call Conversion report shows the conversion of calls to leases.

Vanity Numbers: The Vanity Numbers report shows the vanity numbers and where they are routed.

Settings

The following settings may or may not appear depending on your permissions and which Entrata products you have enabled.

Property Settings

- Go to: Setup >> Properties >> [select a property] >> Communication >> Call Handling >> Call Tracking >> Call Tracking Preferences

Call Tracking Preferences

Activate Entrata Voicemail: Turning on this setting will forward any incoming calls from one of the property's vanity numbers to the Property Solutions voicemail, if the call is not answered within the set Answer Delay Seconds (below). The

Associated Products:
CallTracking™

 For more information about Entrata Reports, refer to the [Entrata PaaS Reports Admin Guide](#).

 For detailed information about individual reports, in Entrata, click on the menu icon  inline with the report name and select **Description** from the list.

 For more detailed information about these settings, in Entrata, click on the tool tip icon  located near the setting name.

voicemail message can be listened to and edited under Properties >> Info >> Greetings & Voicemails >> Voicemails.

Answer Delay (Seconds): The number entered in this field is the number of seconds the phone will ring without being answered by either an answering machine or a person. If there is no answer and calls are set to redirect to the Leasing Center, the call will be transferred. Otherwise, the call will drop.

We recommend setting this value be equal to or greater than 30 if you are not redirecting calls to the Leasing Center. This gives the average answering machine time to answer the call if unanswered by the property.

Archive Calls After Creating a New Lead: Turning on this setting will automatically archive calls after they have been turned into leads from Reports >> Communications >> Call Tracking. Archiving a call removes it from the report unless the filter “Show Archived” is set to “Yes,” but does not remove the call from the lead.

Automatically Create New Leads From Unknown Lead Calls: Checking this box will allow all unknown calls through lead vanity numbers to automatically create leads.

Add Unknown, Unanswered Calls to the Follow-up Dashboard: Turning on this setting will show all unanswered calls on the follow up dashboard. By default only unanswered calls from known numbers or voicemails left from known/unknown numbers are provided on the dashboard.

Require a Note When Submitting a Call Action: When this setting is checked, the Notes/Description field will be required when submitting a call action in the Call Action and View Call Association windows. Edit