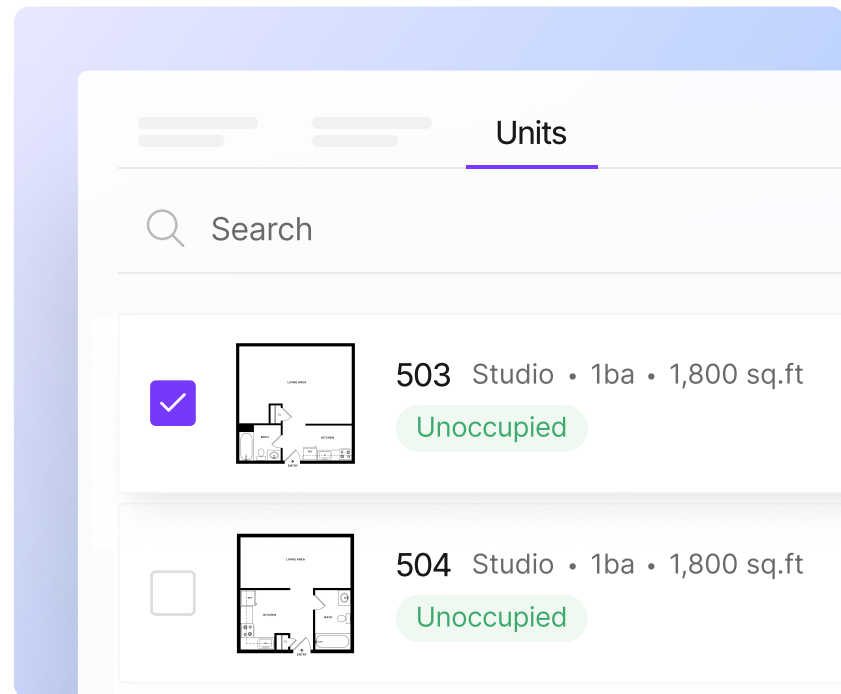


Unit Recommendations

Generate Quotes in EliseCRM



Create unit recommendations to share pricing with prospects after their tour. Unit recommendation quotes can be generated directly from the Unit tab in the prospect's EliseCRM guest card, and shared directly in the conversation thread. This helps maintain consistent communication for prospects, and makes it easy for you to review the recommendation in the future.



Identify the units you want to create recommendations for



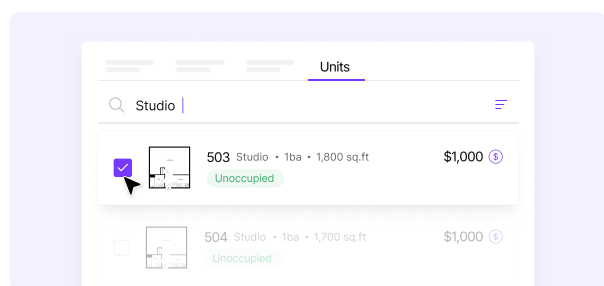
Select a quote from the pricing matrix for each unit



Confirm the unit recommendation details

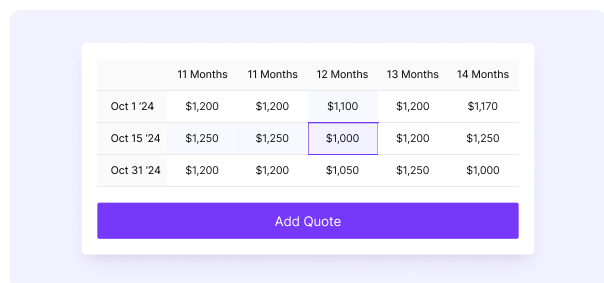


Review and send recommendations to prospects



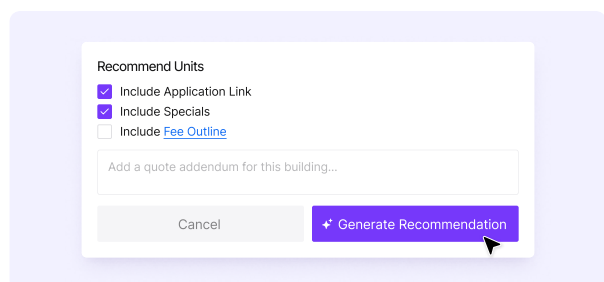
Identify Units to Recommend

Open the prospect guest card and navigate to the Units tab. Locate the unit you want to create a unit recommendation for. You can search for a specific unit, or filter by availability and unit details like number of bedrooms, size, and price.



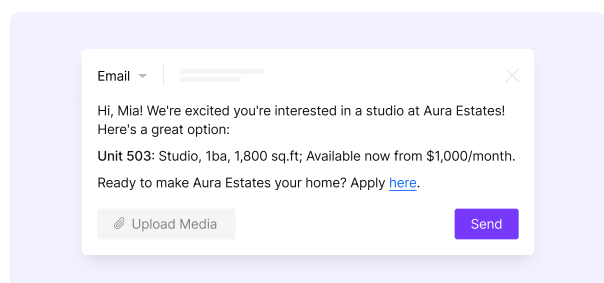
Select a Quote

Click the purple (\$) icon to open the pricing matrix. Select a quote and a move in date, and click Add Quote to save. Select Recommend Units at the bottom of the side panel when finished.



Confirm Recommendation Details

Customize the information you would like to include alongside the quote. Optional details include floorplans, specials, application links, and a customized addendum. Addendums are the perfect feature for adding expiration disclaimers or fee outlines that you want to include in every quote.



Review and Send Recommendation

Review the generated recommendation in the chat, and edit the message as needed. When finished, click Send to share the unit recommendation with the prospect. The message will be saved in the conversation history.