INTRODUCTION
Relate 24/7℠ is an automated prospect and resident follow-up email marketing machine. Even when your leasing team is busy with other important tasks, this dynamic electronic mail program can automatically generate timely, personalized outbound emails to Prospects, Residents, Move-Outs and anyone else you would like to contact. In this manual, you will learn how to use your Relate 24/7℠ system as an effective email communication tool.

This manual is divided into seven sections to help you understand and use your custom Relate 24/7℠ system:

- UNDERSTANDING YOUR SYSTEM – An overview of your customized Relate 24/7℠ system with any specific instructions from your management company.
- SIGNING IN / PASSWORD RETRIEVAL – Instructions for signing into a web-based application with your unique user name and password and what to do if you forget your login.
- HOME / RELATE 24/7℠ DASHBOARD – A summary of your system information including the Property Overview, Scheduled Messages with the ability to manage these messages and a quick view of your community’s scheduled On Demand & Campaign Messages by date.
- VENDOR SECTION – An overview of the Vendor Section which is used to add, edit and send messages to vendors.
- COMMUNITY SECTION – An overview of the Community Section which is used to add and edit units, prospects and residents.
- MESSAGE SECTION – Instructions for preparing and sending On Demand Messages and reviewing messages sent to Residents and Prospects.
- REPORT SECTION – This section outlines the system reports that available for review, print and export to Excel.
- MANAGEMENT ADMIN – This section outlines managing your community profile, user profile and both Campaign and On Demand Messages.
UNDERSTANDING YOUR SYSTEM
The Relate 24/7℠ system will be integrated with your property management software. On a nightly basis, Ellipse receives your data that is then imported into your Relate 24/7℠ system. As long as your property management software remains up to date, your Relate 24/7℠ system will too.

SIGNING IN
Relate 24/7℠ is a web-based application, meaning that you access the program through the Internet. You have been assigned a unique username and password which you will use to gain access into Relate 24/7℠.

Follow the steps below to login to the system:
1. To access the new Relate 24/7℠, visit http://www.relate247.com/login.aspx. Don't forget to bookmark this URL in your Internet browser.
2. Enter your assigned Relate 24/7℠ Username and Password.
3. Click the button to login to the system.
HOME / RELATE 24/7℠ DASHBOARD

Once you are logged into the system you will be directed to the home screen / Relate 24/7℠ Dashboard. The Relate 24/7℠ home screen contains four areas of interest which are color coded below for reference.

Figure DB-1

1. **CONTACT** – For your convenience, the contact information for Ellipse Communications, Inc. is provided in the top right corner of the home screen. Please contact us if you need assistance. Below the Contact information to the right, you will find the Top Out button shown in blue on Figure DB-1.

2. **HORIZONTAL NAVIGATION** – Used to access the following sections in the system: Home, Vendor Section, Community Section, Message Section, Report Section and Management Admin shown in red on Figure DB-1.

3. **RELATE 24/7℠ DASHBOARD** – Displays your Property Overview, Scheduled Messages with the ability to manage these messages and a quick view of your community’s scheduled On Demand & Campaign Messages by date shown in yellow on Figure DB-1.

Under Property Overview you can review the current number of Units, Residents, Residents with Valid Email and Opt Out Residents (for both Campaign and On Demand Messages) as well as Prospects, Prospects with Valid Email and Opt Out Prospects (for both Campaign and On Demand Messages).

Under Scheduled Messages you can review the Message Send Date, Message Subject and Message Content. If you need to make changes to the Message Subject or Message Content, click the View Recipients/Edit Message link to the left of the message. From this screen you can edit the Message Subject and Message Content or delete the message from the system.

- To save the Message Subject or Message Content after making changes, click the Update button shown in DB-2. The message will be sent on the scheduled date to the preselected recipient list.
- To discard any changes made to the Message Subject or Message Content, click the Cancel shown in DB-2. The original Message Subject or Message Content will be sent.
- To delete the message in order to change the date or recipient list, click the Delete shown in DB-2. You will have to go to the Message Section > Send/Schedule Message to schedule a new On Demand Message.

Figure DB-2

Under On Demand & Campaign Messages you can review the number of On Demand Message Sent, On Demand Messages Read and On Demand Messages in Queue as well as the Campaign Messages Sent, Campaign Messages Read and Campaign Messages in Queue.

4. **FOOTER** – The Footer is available at the bottom of every page and includes the following shown in green on Figure DB-1:

   - **Legend**, quick reference guide, to understanding the action icons found throughout the system.
   - **Need Help?** for access to the system FAQ’s and training materials.
   - **Edit Profile** and **Edit Community** for quick access to making updates to community information.
   - **Send Feedback** by filling out a survey with your comments and suggestions for Relate 24/7℠.
VENDOR SECTION
An overview of the Vendor Section which is used to add, edit and send messages to vendors as well as to review the reports of messages sent.

This is a NEW feature to the Relate 24/7SM system and is not activated by default. If you do not have access, please contact Ellipse so that we can activate this feature for your community.

VENDOR ADMIN
1. To add or edit Vendors to your system, select Vendor Admin from the Vendor Section navigation button shown in Figure VA-1.

2. You can manually add Vendors by clicking the button shown in Figure VA-2.

   To manually add a new Vendor you must select the Vendor Category*, Vendor Name, Contact First Name, Contact Last Name, Email, Address, City, State, Phone, Fax and a Note (if needed) shown in Figure VA-3.

   * Vendor Category is controlled by your management company. If you need a new category added, please contact your management company so that they can make the addition to the system.

3. To import multiple Vendors into the system at one time, you must first download the Vendor Excel spreadsheet by clicking the PropertyVendor.xls link shown in Figure VA-2.

   A Windows Internet Explorer window will pop up on the screen and ask, What do you want to do with PropertyVendor.xls? Select the Save option shown in Figure VA-4.

   Enter your vendor information in the PropertyVendor.xls spreadsheet shown in Figure VA-5. DO NOT change the name or remove any of the column headers. When you save the spreadsheet make sure you save it with the same name PropertyVendor.xls.

   To upload your Vendor spreadsheet, select the button to the right of the Vendor Excel Spreadsheet Upload and find the location of the PropertyVendor.xls spreadsheet on your computer and click the button shown in Figure VA-2.
COMMUNITY SECTION
An overview of the Community Section which is used to add and edit units, prospects and residents.

Since your system is integrated with your property management software, the Community Section is used strictly for the purpose of reviewing imported data specifically Buildings/Units, Residents and Prospects.

Keeping your property management software up to date will ensure that your Relate 24/7SM system has current data.

UNIT ADMIN
1. Select Unit Admin from the Community Section navigation button shown in Figure UA-1.

2. From the Unit Admin screen, you can review your community’s most recent Building and Unit data imported from your property management system. You can sort the data by selecting any of the column headers shown in Figure UA-2.
RESIDENT ADMIN
1. Select Resident Admin from the Community Section navigation button shown in Figure RA-1.

2. From the Resident Admin screen, you can review your community’s most recent Resident and Move Out data imported from your property management system. You can sort the data by selecting any of the column headers shown in Figure RA-2.

PROSPECT ADMIN
1. Select Prospect Admin from the Community Section navigation button shown in Figure PA-1.

2. From the Prospect Admin screen, you can review your community’s most recent Prospect data imported from your property management system. You can sort the data by selecting any of the column headers shown in Figure PA-2.
MESSAGE SECTION
Instructions for preparing and sending On Demand Messages and reviewing messages sent to Prospects and Residents.

ON DEMAND MESSAGES VS CAMPAIGN MESSAGES
The Relate 24/7SM system sends two types of email messages On Demand and Campaign. **On Demand Messages** are emails that you must login to the system to send. These can include but are not limited to community newsletters, activities and parties, inclement weather, pest control, look and lease specials, etc. **Campaign Messages** are automatic emails that are sent on dates triggered in the system. These triggers include the status of a resident, prospect, move out, lease renewal date, birth date, or holiday date.

PERSONALIZED OPTIONS
Personalized Options allow you to add property specific information to the subject and message of the email as well as personalize a message to multiple recipients.

Selecting one of the Personalized Options from the drop down list will insert data from your Relate 24/7SM records. For instance, if you select First Name the personalized option {{FirstName}} will be inserted in the body of the email. When your recipient receives the email, the message will have their name inserted in place of {{FirstName}}.

**NEW** - The Relate 24/7SM system now has Personalized Options for links to your Facebook, Twitter and Blog as well as your Apply Online link and Rent Payment link.

Personalized Options such as First Name, Last Name, Full Name, Title and Middle Name DO NOT work if you chose the Email Address option because those recipients are not tied to a recipient record in your system.

SEND/SCHEDULE MESSAGE
1. Select **Send/Schedule Message** from the **Message Section** navigation button shown in Figure SM-1.

2. Select the **Send Date** which is the date that you want to send your message. Selecting a future date will schedule the message to be sent on a future day. Please read the **Attention before you click “Send Message” button** instructions that appear on the screen before sending your message shown in Figure SM-2.

3. Select the **Send To** which is the recipient list that you want to receive the message shown in Figure SM-2. You can specify recipients by:
   - Residents (current residents only)
   - Building Numbers (current residents only)
   - Unit Numbers (current residents only)
   - Prospects (current prospects only)
   - Move Outs (former residents only)
   - Email Address
4. You can select a prewritten message from the Use Template Message? This will automatically populate the Message Subject and the Message Content with the pre-saved information shown in Figure SM-3.

5. You can also create your own message by entering the Message Subject and Message Content from this screen. Construct your message in the text box shown in Figure SM-3. Use the WYSIWYG located above the message block to format the message. (ex. Font Type, Color, Size, etc.).

6. To preview the message, click the Preview button shown in SM-3.

7. To send your email message, click the Send Message button shown in SM-3.

8. To discard a message without sending it, click the [X] Cancel shown in SM-3.

**PROSPECT MESSAGE**

1. Select Prospect Message from the Message Section navigation button shown in Figure PM-1.

2. All current Prospects are displayed under the Prospect Message area shown in Figure PM-2.

3. Besides reviewing the Prospect’s name building/unit number and email address from the Prospect Message screen, you can also determine if their email address is valid. If the checkbox is checked under the Is Valid Email? column the email address for that recipient is valid and the date displayed is the confirmation date shown in Figure PM-2.

4. Prospects may opt out from email messages at anytime by selecting unsubscribe at the bottom of an email. To determine if a Prospect has decided not to receive email messages from your community check the Campaign Opt Out? and On Demand Opt Out? columns. If the checkbox is checked under the either of these two columns then the Resident will not receive Campaign or On Demand messages from your community.

For circumstances where a Resident calls your office and requests to be removed from messages, you can manually opt out a Prospect by clicking the checkbox.
5. To review the messages for a specific Prospect click the **Review Messages** button which is to the left of the Prospect’s name shown in Figure PM-2.

6. On the next screen you can review the **Sent To** email address, **Sent From** email address, **Message Subject**, **Message Body**, if the message **Is Read?** and the **Last Read Date** for Demand Message(s) and Campaign Message(s) shown in Figure PM-3.

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**RESIDENT MESSAGE**

Under the Resident Message area you can review all of the messages (both Campaign and On Demand) sent to a specific Resident.

1. Select **Resident Message** from the **Message Section** navigation button shown in Figure RM-1.

2. All current Residents and Move Outs are displayed under the Resident Message area. Move Outs are those Residents that have a **Move Out Date** displayed in the third column from the right shown in Figure RM-2.

3. Besides reviewing the Resident’s name building/unit number and email address from the Resident Message screen, you can also determine if their email address is valid. If the checkbox is checked under the **Is Valid Email?** column the email address for that recipient is valid and the date displayed is the confirmation date shown in Figure RM-2.

4. Residents may opt out from email messages at anytime by selecting unsubscribe at the bottom of an email. To determine if a Resident has decided not to receive email messages from your community check the **Campaign Opt Out?** and **On Demand Opt Out?** columns. If the checkbox is checked under the either of these two columns then the Resident will not receive Campaign or On Demand messages from your community.

For circumstances where a Resident calls your office and requests to be removed from messages, you can manually opt out a Resident by clicking the checkbox.

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Figure PM-3

**Figure PM-3**

**Figure RM-1**

**Figure RM-1**

**Figure RM-2**

**Figure RM-2**

**Figure RM-2**
5. To review the messages for a specific Resident click the **Review Messages** button which is to the left of the Resident’s name shown in Figure RM-2.

6. On the next screen you can review the **Sent To** email address, **Sent From** email address, **Message Subject**, **Message Body**, if the message is **Read?** and the **Last Read Date** for Demand Message(s) and Campaign Message(s) shown in Figure RM-3.

**REPORT SECTION**

The Relate 24/7™™ reporting tools are found under the Report Section in the Horizontal Navigation. This section outlines the reports that available for review, print and export to Excel.

**PROPERTY STATS**

This report shows your Property Stats that are in your Relate 24/7™™ system.

1. Select **Property Stats Report** from the **Report Section** navigation button shown in Figure PSR-1.

2. From the **Property Stats Report** screen you can review the report, select **Print Report** to print the report or select **Export Report** to export the report to Excel shown in Figure PSR-2.

**PROSPECT REPORT**

This report displays all of the Prospects that are currently in your Relate 24/7™™ system.

1. Select **Prospect Report** from the **Report Section** navigation button shown in Figure PR-1.

2. The column headers shown in Figure PR-2 can be used to sort the report in alphabetical or numerical order to find specific information.

3. For further sorting capabilities, select **Export Report** to export the report to Excel shown in Figure PR-2.

4. Select **Print Report** to print the report shown in Figure PR-2.
RESIDENT REPORT
This report displays all of the Residents that are currently in your Relate 24/7SM system.

1. Select Resident Report from the Report Section navigation button shown in Figure RR-1.

2. The column headers shown in Figure RR-2 can be used to sort the report in alphabetical or numerical order to find specific information.

3. For further sorting capabilities, select Export Report to export the report to Excel shown in Figure RR-2.

4. Select Print Report to print the report shown in Figure RR-2.

MOVE OUT REPORT
This report displays all of the Move Outs that are currently in your Relate 24/7SM system.

1. Select Move Out Report from the Report Section navigation button shown in Figure MOR-1.

2. The column headers shown in Figure MOR-2 can be used to sort the report in alphabetical or numerical order to find specific information.

3. For further sorting capabilities, select Export Report to export the report to Excel shown in Figure MOR-2.

4. Select Print Report to print the report shown in Figure MOR-2.

SENT MESSAGE REPORT
This report displays all of the Campaign and On Demand Messages sent to the recipients in your system during a selected date range.

1. Select Sent Message Report from the Report Section navigation button shown in Figure SMR-1.

2. From the Sent Message Report screen, select the Message Report Type from the drop down menu and then the date range or predetermined date range from the Quick Selection drop down menu. Press the Get Report button to display report shown in Figure SMR-2.
3. Review the report, select [Print Report] to print the report or select [Export Report] to export the report to Excel shown in Figure SMR-3.

**MANAGEMENT ADMIN**

This section outlines managing your community profile, user profile which includes your Username and Password, your selected Holidays, Campaign Messages, Custom On Demand Messages and header and footer Hot Spots.

**COMMUNITY ADMIN**

1. Select Community Admin from the Management Admin navigation button shown in Figure CA-1.

2. Your community’s contact information is displayed under Community Admin shown in Figure CA-2.

3.

**USER ADMIN**

1. Select User Admin from the Management Admin navigation button shown in Figure UA-1.

2. Your community’s contact information is displayed under Community Admin shown in Figure UA-2. You do not have access to edit this information, please contact your management company if any changes need to be made to this information.
HOLIDAY ADMIN

1. Select Holiday Admin from the Management Admin navigation button shown in Figure HA-1.

2. Your management company has preselected not to use the Holiday Campaign shown in Figure HA-2.

CAMPAIGN/MESSAGE ADMIN

1. Select Campaign/Message Admin from the Management Admin navigation button shown in Figure CMA-1.

2. Your management company has preselected the Campaigns and prewritten the messages in those Campaigns. Those Campaigns include Resident, Prospect, Move-Out, Holiday, Birthday and Applicant. To review the messages that are in a specific Campaign, click the View Messages link to the right of the Campaign name shown in Figure CMA-2.

You do not have access to edit the Campaigns or the messages.