

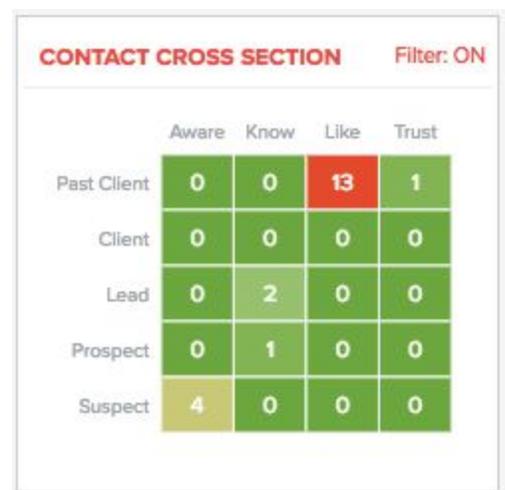
Contact Cross Section (Filtered/Unfiltered)

Dashboard

Realvolve uses the contact cross section to display groups of contacts where the status and stage intersect. This identifies which stage of Aware, Know, Like or Trust each contact is in with relation to their contact status. Each intersecting square in the heat map displays the number of contacts in the groups and uses drill down capabilities to view additional details on the contacts. The contact cross section has two separate views which can be changed by clicking on the filter option in the upper right corner. The **filtered** view is used to identify which contacts should personally called or visited right away, the **unfiltered** view shows the overall count of contacts in the database. ([SEE VIDEO](#))

Filter: ON (Default)

Realvolve monitors the **Last Call Date** and the **Last Personal Visit Date** on each contact. The most recent date of the two fields represents the **Last Action Date** and is considered a *meaningful* touch point. When the filter is **ON**, Realvolve uses a threshold rule to determine which people in the database have **not** been contacted within the specified number of days and recommends that you reach out to them. The number of days can vary based on the contact type as well as the A|B|C|D categories. It is important to note that a Last Call Date or Last Personal Visit Date **must** be assigned in order for the contact to be listed in the filtered cross section. This helps to prioritize contacts that have been called or visited with at least once. Since the contact cross section is also a Heat Map, it displays those groups with the greatest number of contacts in a darker RED color to indicate where you should concentrate your efforts. Your goal each days is to eliminate the RED squares and obtain all ZERO's.

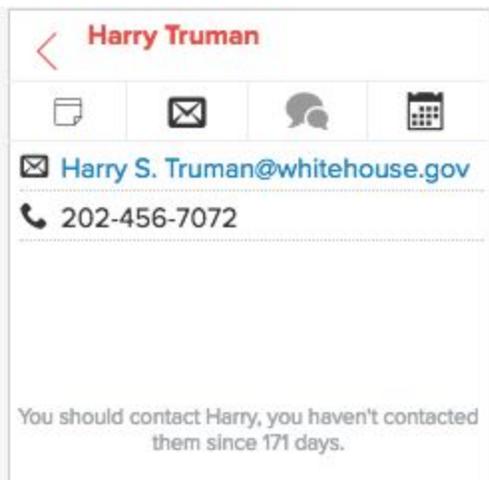


In most cases, a Realvolve workflow should be used to communicate with people in your database on a regular schedule. The threshold rules are used to assign the maximum number of days between personal communication in order to prevent contacts from falling through the cracks. Any contact which hasn't been contacted by phone or personal visit within the specified number of days will be displayed in the filtered view of the contact cross section.

PAST CLIENT / LIKE	
Harry Truman 171 days since last called	8
Woodrow Wilson 167 days since personal visit	8
Chester Arthur 162 days since last called	8
James Buchanan 151 days since last called	8

Clicking on a cross section square displays a list of contacts which intersect at that status and stage. The number of days since the last call or personal visit will be displayed below their name. The contacts with the greatest number of days since the last action are listed first in order to give them priority.

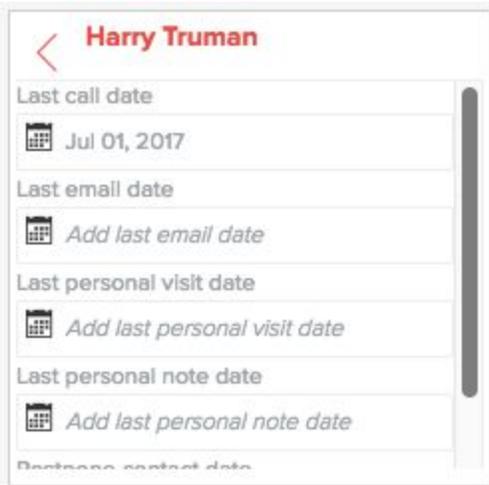
Clicking on a name in this list will show more detail about that contact. This view shows the name of the contact and basic information such as email address and phone numbers.



Click on the Name at the top to open the full contact record or use any of the four buttons to perform quick actions.

-  Add a Note to this contact.
-  Email this contact.
-  Send contact an SMS text message.
-  Assign Last Contact Dates

Clicking on the calendar button to assign contact dates allows you to assign the Last Call Date, Last Email Date, Last Personal Visit Date, Last Personal Note Date, as well as the Postpone Contact Date to prevent this contact from showing in the contact cross section until after that date. This is useful for cold prospects which don't want to be contacted until after a specific date.



If the **Last Call Date** or **Last Personal Visit Date** is assigned a recent date then the contact will be removed from the list until the threshold rule is met again in the future.

How is this useful in my daily real estate business?

Let's assume you wanted to personally communicate with your past clients every 120 days. By simply entering the Last Call Date or Last Personal Visit Date, Realvolve will notify you when a past client has hit that threshold value of 120 days. Some days you might be able to call 5 past clients and others you can call more. The contact cross section keeps your past clients on the list until you have changed the Last Call Date, Last Personal Visit Date or assigned a Postpone date. With our flexible configuration, you can assign a different threshold values for Suspects, Prospects, Leads, Clients, Past Clients as well as those Clients in A|B|C|D Categories. Typically, your A & B clients are more important and more frequent communication is desired.

Assigning Threshold Values:

To modify the filtered view threshold days go to **SETTINGS**
> **SET DEFAULT FIELDS** > **DASHBOARD**

Assign the maximum number of days between personal call / visit based on Contact Status and ABCD categories.

Contact Follow-Up Settings

Suspect	<input type="text" value="2"/>	Days from last action.
Prospect	<input type="text" value="3"/>	Days from last action.
Lead	<input type="text" value="7"/>	Days from last action.
Client	<input type="text" value="7"/>	Days from last action.
A	<input type="text" value="60"/>	Days from last action.
B	<input type="text" value="90"/>	Days from last action.
C	<input type="text" value="120"/>	Days from last action.
D	<input type="text" value="180"/>	Days from last action.
Past Client	<input type="text" value="120"/>	Days from last action.

- **Suspect** (Default: 2 Days from last action)
Anyone with a **Contact Status** of “**Suspect**” - These are new leads that were manually entered or were received through your lead generation website. You know very little about this contact so you need to connect on a frequent basis. The goal is to contact them quickly and often to qualify the lead and determine if they are ready to buy or sell.
- **Prospect** - (Default: 3 Days from last action)
Anyone with a **Contact Status** of “**Prospect**” - These are leads that you have been communicating with to determine their needs and see if they are ready to buy or sell a home. If they are not ready to buy or sell then you can leave them as a contact status of “**Prospect**” and assign the “**Postpone Contact Date**” to indicate the next time you should reach out and connect.
- **Lead** - (Default: 7 Days from last action)
Anyone with a **Contact Status** of “**Lead**” - These are contacts that have been qualified and are ready to buy or sell right away but you don’t have a signed agreement with them yet. You should continue to communicate frequently until they sign an agreement with you.
- **Client** - (Default: 7 Days from last action)
Anyone with a **Contact Status** of “**Client**” - These are contacts that are currently party members of an active Property or Transaction. Typically, a workflow is running but this will ensure clients have regular communications for updates without the need of a workflow. Weekly communication is normal.
- **Category A** - (Default: 60 Days from last action)
Anyone with a **Category** of “A” should be contacted on a regular basis. This allows for different touch point variations based on category interpretation.
- **Category B** - (Default: 90 Days from last action)
Anyone with a **Category** of “B” should be contacted on a regular basis. This allows for different touch point variations based on category interpretation.

- **Category C** - (Default: 120 Days from last action)
Anyone with a **Category** of “C” should be contacted on a regular basis. This allows for different touch point variations based on category interpretation.
- **Category D** - (Default: 180 Days from last action)
Anyone with a **Category** of “D” should be contacted on a regular basis. This allows for different touch point variations based on category interpretation.
- **Past Clients** - (Default: 120 Days from last action)
Anyone with a **Contact Status** of “**Past Client**” that does not have a Category of A|B|C|D. This is a FALLBACK notification option for those contacts which do not have a category assigned.

Filter: OFF

The unfiltered view shows a similar status / stage intersection of contacts, however it does not use any threshold rules so everyone is displayed. The detailed list of contacts in each group is ordered by their relationship score showing those people with the highest scores at the top. This represents those contacts which are most important to you and your business. Use this view to find new contacts which you would like to start having regular communication with in the future and assign the Last Call Date or Last Personal Visit Date so they will start showing in the filtered list in the future.

If you have any questions, please contact us at: support@realvolve.com

Questions?

Please direct questions and comments to support@realvolve.com.

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