Real: Workflows

How to systematize your work
to make time for what you enjoy!

Revised: February 2018

Where it all began

Few people know why they do what they do. If I were to ask 100 people why they go to work each day, most would respond with… “To make money”, “So I can eat” or “Pay my bills”. Nobody gets excited about climbing out of bed each morning just to pay their bills. They may do it out of necessity, but in most cases, they dread the thought of going to work each day.

Some people on the other hand, enjoy working because they do something creative or personally meaningful. Call it a cause, ambition, passion or even a mission — whatever the name, it’s a compelling drive to do something bigger.

I discovered my passion in 1991. I was developing software applications with a local real estate agent, Peggy Mitchell. Like most agents, Peggy spent long days, early mornings, late nights, long weeks and sometimes longer weekends helping people with the biggest investment of their life… Buying and Selling Homes.... One evening she came home late, expecting to find her daughter asleep in bed. Peggy went to her Amber’s bedroom to kiss her good night but Amber wasn’t there… Peggy searched through the house frantically until she finally found Amber in Peggy’s closet asleep. Peggy scooped her up and asked Amber what she was doing in the closet. Amber replied… “I’m sorry mommy, I didn’t mean to scare you, I was missing you and wanted to smell your perfume to be closer to you.”

It was at that point, I made the decision to do whatever I could to help real estate agents be more efficient and productive in order to spend more time with their family.

Over the next several years, we designed, developed and deployed systems to automate the workload of agents across the United States, Canada and other countries to increase efficiency and save time. One of the key innovations that we brought to the industry was the automation feature I now call “Workflow”.

“Stop and smell the roses so your loved ones don’t have to settle for perfume… Roses smell better and look more beautiful than a closet.” – Mark Stepp

What is a workflow?

A workflow is a pre-designed series of activities that is setup one time and used to automate typical business processes. Each activity in the workflow can be assigned a date based on criteria you specify as being the normal time to do a given activity. 3 days before closing send closing reminder email.   1 day after closing pick up sign from property, 5 days after the closing date I want to send a “Hope you are moved in” email. Workflows can be created with any number of activities and use any number of milestone date fields for the criteria.

By creating your own workflows or utilizing workflows from the workflow library, you can systematize the daily repetitive tasks which occupy your time. Think of a workflow as a pre-designed sequence of steps that helps to methodically and consistently reach an objective. A workflow performs a series of actions to reach an intended result.

Much of your daily work can be turned into a workflow. Look at what you do each day and identify those activities that are repetitive in nature. Review the projects that you’ve done in the past 30 days. The new listing agreements you’ve received and each closing you completed and decompose each step-by-step. The more steps you can enumerate and capture in a workflow stream, the better.

Don’t trust things to memory – Items get overlooked or fall through the cracks…

By forcing yourself to following the activities, you are able to consistently give each client the same great service day in and day out. That great service translates to superior customer satisfaction and ultimately, more referrals and repeat business.

Just like authoring a best selling book… The real key to a good workflow is taking the time to first develop and write it. Once it is setup and running, you get paid on it forever… both financially and with more free time to spend with your loved ones…

Common real estate workflow examples

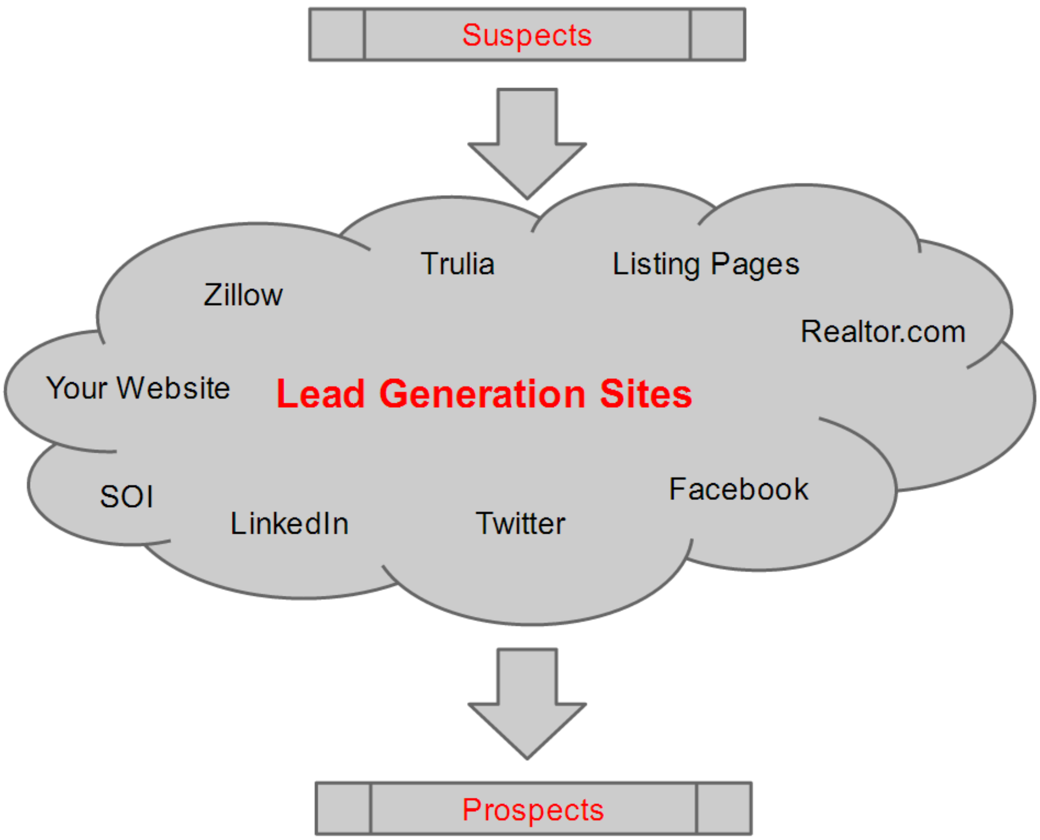
Here are a few workflow examples… Most anything that is repetitive in nature can be automated and systematized using templates, checklists and automated actions of a workflow. Realizing the power of the workflow in your day-to-day processes will save you time and keep you organized.

- Steps performed …
  - After a new contact is received from a lead generation website.
    - Automatically import contact information.
    - Categorizing contact based on lead source.
    - Offering free information based on information provided.
    - Automated daily, weekly or monthly prospecting emails.
  - To prepare for a listing presentation.
    - Checklists to help prepare yourself for appointments.
    - Appointment reminder emails.
    - Follow-up emails after the listing appointment.
    - Offering free information by email.
- All the activities required…
  - After a seller signs a listing agreement.
    - To Do's and Checklists.
    - Phone call reminders.
    - Automated status updates.
    - Automated emails to service providers for staging.
    - Facebook, Twitter or LinkedIn messages to contact.
    - Automated data collection for staff.
    - Automated response emails from showing appointments.
  - After Buyer signs a sales contract.
    - Automated Reminders to Lenders, Appraisers, Title Reps
    - Checklist Requirements
    - Special case options to branch to other workflows
    - Email Buyers and other party members on status
    - Closing reminders and what to bring.
- Post-closing follow-up
  - Email buyer monthly for 7 years.
  - End of Year HUD emails for each Buyer.
  - Annual sphere of influence emails
  - Referral "*Thank You*" emails

The Sales Process

Suspect to Prospect

Most users understand the sales process that a contact goes through from being a Suspect, Prospect, Lead, Client, Past Client but I want to show it graphically and help explain why workflows are important. A *Suspect* is anyone that is in your target market or anyone that may influence someone in your target market. Suspects are typically not on your radar but they are out there. They may visit your website or blog looking for information about their particular need. The suspect could be known by someone in your Sphere of Influince but have not shared their need with that person yet. Suspects are those people that are looking for information or content which you have.

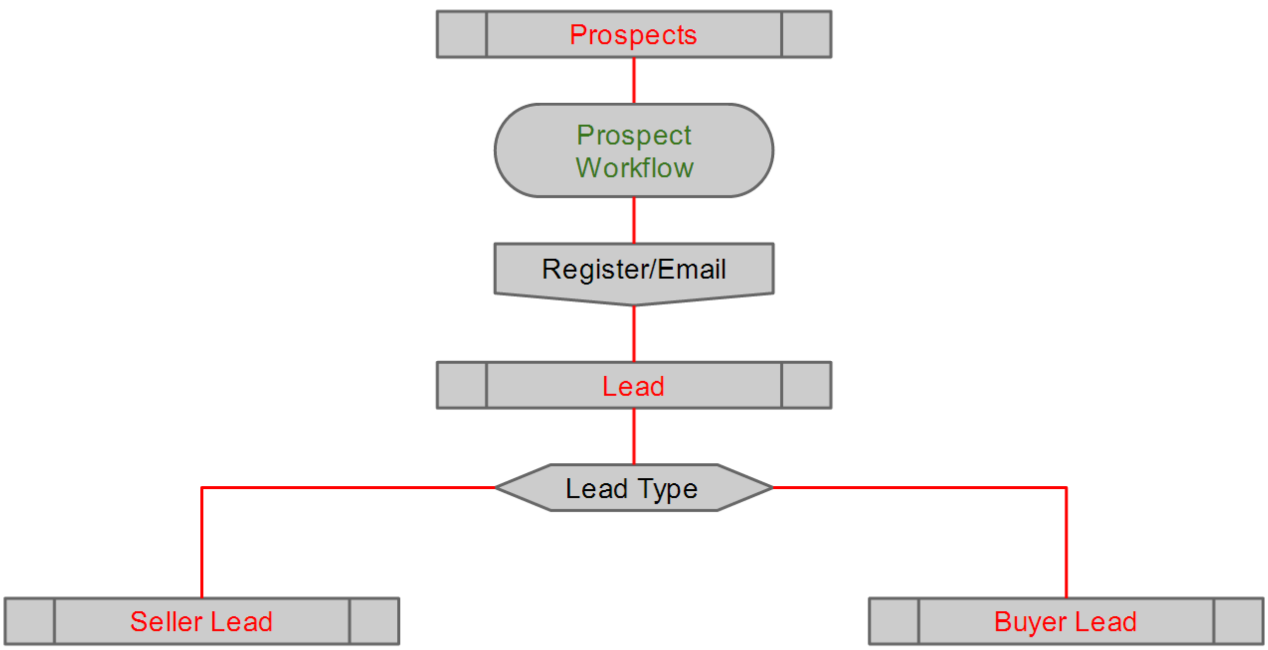


Once a suspect actively supplies personal information, usually in the form of an email, for your content, they become a *Prospect*. In essence, they have raised their hand up high and said "**I may need your assistance**". You don't know what their need is yet but they have at least identified themselves as someone that you may be able to help. Their question is… are you the right person to help them… A prospect is not a Lead yet, but someone that could be a lead if you supply the information they need in order to make an informed decision to proceed with your services.

Prospect to Lead

Prospects are looking for detailed information on how you can solve their particular problem. Usually, you can supply that information in the form of Emails, Reports, Ebooks, Webinars or Events of some kind. The most efficient way to perform these tasks is by using an automated Workflow Stream which sends a series of emails or other touch points on a pre-determined schedule. The "Prospect Workflow" stream is a series of daily emails containing fragments of information that prospects want to know. Giving a prospect free information in smaller segments gives you an opportunity to send more information the each day.

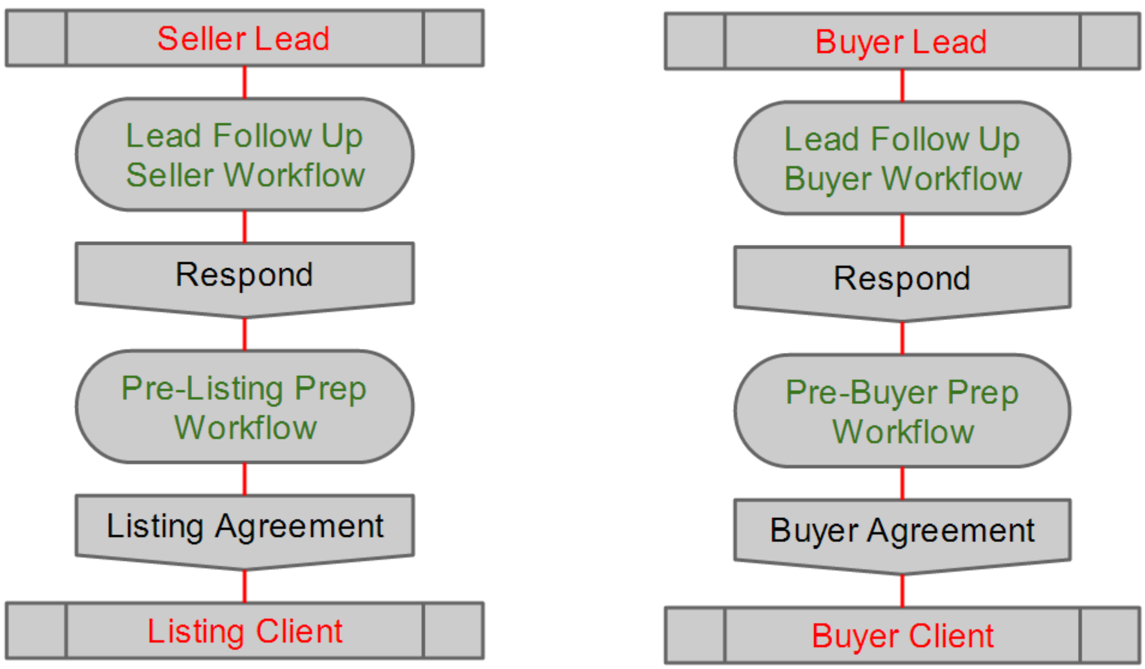
Using a "Call to Action" link at the bottom of each email, provides the prospect an opportunity take the next step when they are ready. Once the "Call to Action" is performed, usually by registering or replying to the email, the prospect changes to a *Lead*.



A Lead is nothing more than a prospect that has identified their specific need. The "Call to action" should allow the lead to identify them self as Seller, Buyer or Both. Based on that selection, the path to converting them to a client can be different.

Lead to Client

At this point, you will know more about your lead and what type of information they need. It is at this point you can stop the prospect workflow and start the Lead Follow Up Workflows for either the Seller or Buyer or possibly BOTH. The point of the Lead follow up emails is to get a response for an appointment. The lead has not made the commitment to do business with you yet, but with the stream of emails in the workflow will guide them to another “Call to Action” and respond to meet with you.

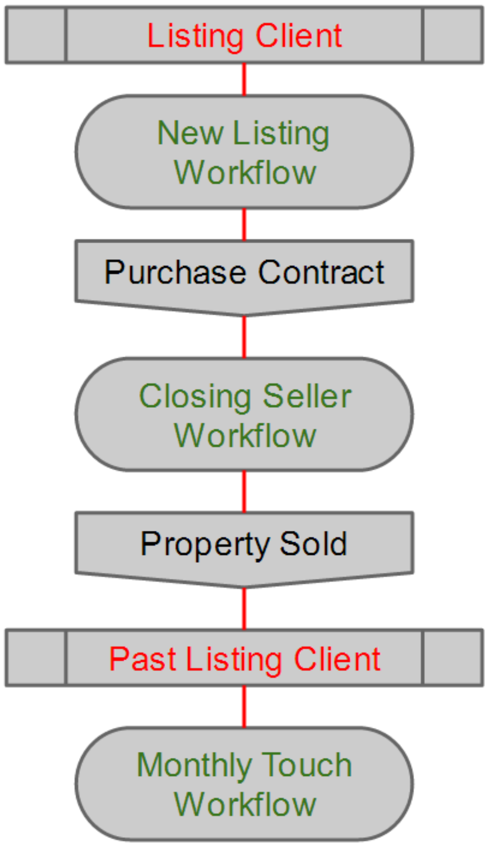


Once that response happens then the Lead Follow up workflow can stop and automatically start the Pre-Listing or Pre-Buyer Prep workflows. The prep workflows are a combination of items to send to the lead, checklists to complete or actions to do prior to meeting with the Lead in order to successfully convert them from a lead to a client with either a Listing or Buyer Agreement.

Client to Past Client

Listing Clients:

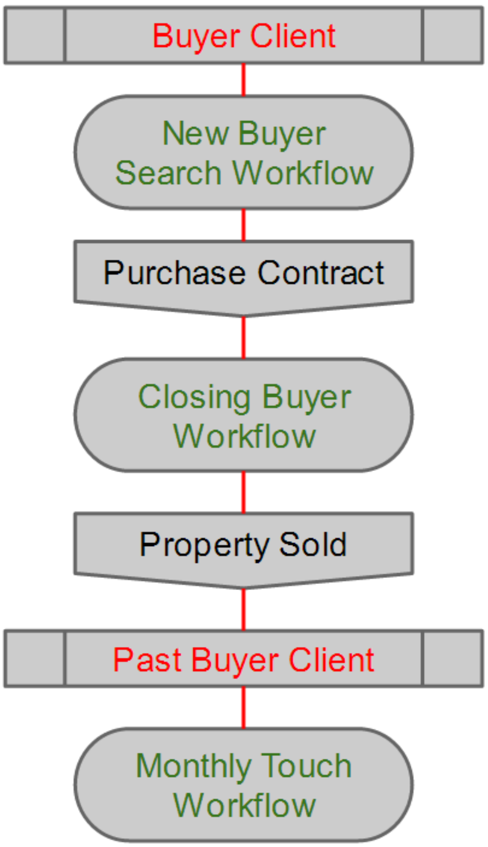
If the contact is a listing client, you would start the "New Listing Workflow" in order to manage the countless items that need to be done through the listing process. Getting all the paperwork completed, using checklist items for the sign in the yard, lockbox on the door, property photos and the list goes on… The workflow also helps keep the seller informed of daily tasks performed as well as responses from open house attendees, other agents and prospective buyers. If the property does not sell right away then the workflow will notify you a few days prior to expiration to get a listing extension and recommendations on price adjustments to the seller.



Ultimately, you are working to find a buyer for the property. Once that buyer is found the "Closing Seller Workflow" will guide you through all the steps from Contract to Close. Making sure inspections are done, contingencies are met, Appraisals are complete and the Loan has been approved as well as Title and Escrow tasks. During this phase of the process any number of challenges could occur, but using the branching capabilities of the Realvolve workflow guides you safely through the process without the fear of missing important items.

Once the Property is sold, the Client moves to the next status of "Past Client". You can immediately start the "Monthly Touch Workflow" which is a series of emails, phone calls, events and more to let your past client know how much you appreciate their business and not just drip on them with useless emails. The emails and information that is sent needs to be informative and useful so they don't get thrown in the trash with all the other junk mail. The other important aspect of the Monthly Touch Workflow is to keep your name in front of the contact so that when they decide to buy or sell or know someone that is going to buy or sell then they will remember to call you.

Buyer Clients:



The buyer client goes through a different process but uses workflow methods in the same way as a listing client. Starting them on the “New Buyer Search Workflow” keeps them informed on the properties in the area and the market conditions that could affect their buying decisions.

Once a property is found for the buyer and a contract is written and accepted, the Search Workflow will stop and the “Closing Buyer Workflow” will begin to step you through the Contract to Close process for the Buyer. Verification on Property Inspections, Appraisals, Loan Approvals and all the other processes that are required to close the transaction. Having a system to automate each of the steps is extremely efficient and provides consistency in your business to promote repeat business and higher referral rates.

After the property closes, the contact changes from Client to Past Client and the Monthly Touch Workflow begins the same process of keeping your name in front of that contact each month with informative emails and touch points.

Workflows in This Example Sales Process

- Prospect Workflow
- Lead Follow Up Seller Workflow
- Lead Follow Up Buyer Workflow
- Pre-Listing Prep Workflow
- Pre-Buyer Prep Workflow
- New Listing Workflow
- Closing Seller Workflow
- New Buyer Search Workflow
- Closing Buyer Workflow
- Monthly Touch Workflow

Other Workflow Examples

- Open House Follow Up
- Reconnect with Existing SOI
- Preparing Your Home to Sell
- Internet Search Engine Checklist
- Broker Open Checklist
- Relocation Checklist
- Social Networking Checklist
- Prepare CMA
- Listing Input checklists

NOTES:

Name some daily tasks that you would like automate?

Three Ways to Systematize Your Workday

There are always trade-offs when developing systems to be more productive. Below are the 3 basic variations to designing workflows and getting setup to use Realvolve on a daily basis to save you time. As usual, the two main constrains are time and money. Depending on how much time you have to invest in yourself and the budget you have to get the systems rolling, one may be better than the other. Obviously any combination of the three variations will work so let me share the options and let you make the best decision for your needs.

Option 1: "Do It Yourself"

The most popular method is the "Do It Yourself" method of creating workflows. This means looking at your current systems and re-creating them from scratch. Collecting the countless checklists, spreadsheets and emails that you currently use and either entering them by hand or copy/pasting them where possible. This is the by far the least expensive in terms of hard costs because you are doing it yourself – the main cost is Time. We do have some great workflows in the workflow library that you can download for free and modify as needed to help reduce the time it takes to get everything rolling. But there are times when trying to figure out what is setup vs. what you need setup can eat up time as well.

Option 2: "Buy Premium Workflows"

The second option is to purchase Premium Workflows from our workflow library. While we do have several free workflows available, it may be better to purchase the workflows you want from a 3rd Party. We have workflows from vendors like Dave Beson which has an awesome collection of follow-up letters which can be used over 7 to 10 years. We also have the Gary David Hall Trans-Plan system which is an extremely detailed system for tracking the things you do for New Listings and Transactions for buyers and sellers. Most Premium workflows range from $99.00 to a several hundred dollars depending on what you need. This will save you a lot of time in setup and has a moderate cost which is trivial when compared the amount of time it would take to manually setup the workflows and templates. The challenge is that you still have to customize the workflows to meet your personal work habits but it does give a head start.

Option 3: "Custom Workflow Setup"

The last option is very popular for the user that doesn't have the time or desire to setup the workflows themselves or has a complicated staffing structure but is willing to invest financially in their business to get Workflows done right. Simply supply the checklists, spreadsheets and existing emails and we do the rest. Our team of Workflow Specialists will go through your current documents. Map out the correct workflow activities and setup checklists, actions and message templates to make Realvolve work the way you do. The cost of a custom setup varies based on the individual needs of the account holder. Gather all the current checklists, spreadsheets and emails and send them to our team to get a free estimate. Custom setups can range from $500.00 to $2,500.00 or more but gives you the best result in the least amount of time. Since workflows are our specialty, we can set them up in a fraction of the time.

How do you define a workflow?

Use the five “W”s to setup your own workflow: Why, Who, Where, When, and What.

Choosing Why

Choose the Why first, as it helps identify the steps in the workflow. Here are some examples of Why: “New listing”, “45-day escrow”, “60 days to close”, and “Prospect follow-up”. You can even focus the workflow more narrowly, such as “45-day escrow, seller”, “45-day escrow, buyer”, “45-day escrow, buyer and seller.” Typically, the Why becomes the title of your workflow.

Once you’ve identified the purpose of a workflow, you can focus on the tasks required to achieve its goal. A workflow typically requires many tasks, where each task requires one or more of the rest of the “W”s, Who, What, When, and Where.

Identifying Who

There are two parts to this… Who is doing the task and Who is the task being done for? Every task has to be done by someone on your team — this is the first part of the Who equation. If you are an individual agent, you’ll likely perform every task in the workflow. However, if you are part of a team, a task might be assigned to a teammate or specialist. A workflow action can represent the job or role of one person on your team. The second “Who” of the equation represents the person(s) receiving the action. Most often, a task is performed for a client, a buyer or a seller, however a task can be for any party member involved in a listing or transaction. Additionally, you can select a group of contacts using a TAG as an identifier.

Picking Where

The majority of workflow activities likely concern a property. The property is the Where— it’s the context in which the work is performed. The Where is selected when you start using a defined workflow.

Choosing When

“When” dictates the timing of a task. “When” can be expressed in a couple different ways. For instance, “October 15th” and “Three days before closing” are both supported. The former is an example of an absolute date. Some tasks have absolute dates, such as the start of a Holiday like New Years Eve or Thanksgiving.

However, most tasks occur after some time has elapsed from the start of a project or at some point before the end of a project. These dates are called relative dates or calculated dates, because the actual calendar day on which the task falls is derived from some other date. For example, consider the task “Send a reminder to buyer three days before closing.” Here, the When is “3 days”, “before,” “closing date.” If the closing date is scheduled for December 10th, the reminder is scheduled for December 7th. Calculated dates are essential to the construction of a workflow. A workflow is intended to be used time and time again. It's a template. A calculated date is a formula: it computes "When" given one or more absolute dates.

As you'll see briefly, tasks with absolute dates are scheduled when you start a new workflow. For instance, if you start an "Escrow" workflow, you'll be prompted to schedule the date of closing. A task with an absolute date must be scheduled manually to reflect the terms of your deal. However, a task with a calculated date is automatically scheduled according to its formula.

It's usually easy to discern when an absolute date is appropriate. The examples that follow can provide inspiration and instruction.

Specifying What

Finally, the "What" of a task dictates the actual work to be performed. What might describe a phone call to make, an email to send, a document to send for execution, or a lunch meeting.

Realvolve provides a great many attributes to describe the What of a task. Attributes include a title, a type, a checklist, and automated actions to run on completion of the task.

- The title is a brief description of the activity.
- Type is a handy classification like: Anniversary, Appointment, Birthday, BombBomb Video, Call, Email, Follow Up, Meal, Meeting, Text, To Do, Travel.
- The checklist defines one or more items that must be complete before the task can be marked done. A task checklist is optional, but consider using it to break down a complex task into its smaller parts.
- A task action performs an activity on your behalf whenever its associated task is marked complete. For example, say you want to send email to your buyer after closing. Attach an Email action to the closing and choose the email template to use. In most cases, the template is some form of a document with merge fields.

    > Hey [[Greeting]], Just wanted to say congratulations on the purchase of your new home. I'm so glad you found the right one. If there is anything that I can do to make the move easier, please let me know.

    Here, the placeholder [[Greeting]] would be replaced with the first name of the buyer of the property. The resulting text is sent via email to the buyer's email address.

    Other actions can add or remove tags, post to Facebook, as well as start other another workflow. Actions are done automatically for you to reduce the time it takes to reach your goals.

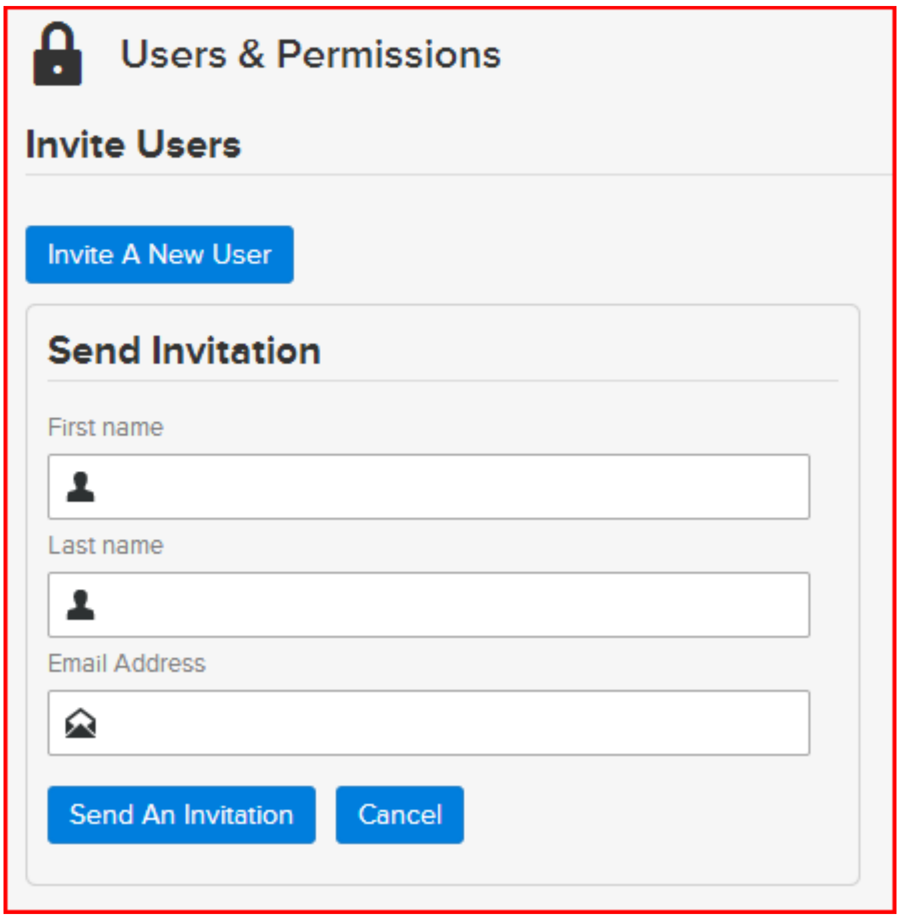
The next section presents a technique to organize your tasks to prepare them to be converted to a workflow.

Setting up Sub-Users

One important task that must be completed before setting up workflows when operating in a team environment is to add all the sub-users first. This is especially important if a transaction coordinator or assistant has to be assigned activities in the workflow. The "**Assign To**" selection list of a workflow activity is populated with all the users in the system.

In order to add users to the Realvolve account:

1. Select **Settings** > **Users & Permissions**.
2. Click on the **Invite A New User** button to display the Send Invitation box.
3. Enter the *First Name*, *Last Name* and *Email Address* of the user to be added.
4. Press **Send An Invitation**.



Once the invitation has been sent, have the user check their email and follow the link to finish the setup process. It will allow them to assign their own password. Visit our YouTube channel for step-by-step instructions.

Search YouTube for "***Adding Users and Setting Permissions in Realvolve***"

Write it down on paper

Make a copy of the Workflow Worksheet for each of your “Why’s” identified above.

1. Fill in the Title, Use with, and tags that make sense to you.
2. Write down each step in the process on a separate line of the form.
3. You should identify the type of activity, title or description that makes sense to you along with who should complete that step (you or a team member) and then when it should normally be completed.

After you have written down every step of the process you can then enter the information from the pages into the workflow editor to organize yourself and your team in a more efficient manner. Don’t worry about the order you put them on the printed form, the system will automatically organize them.

The purpose of this process is to identify ALL steps needed for a successful outcome.

The 9 example activities of the sample workflow worksheet in this book are used as a guide to explain how to setup your own workflows.   Be sure to look at the detailed description of each activity to understand what is being added and why.

Workflow Worksheet

Workflow Name: New Listing Agreement

Use With: Property Tags: New Listing

Type	Title	Assigned To	#	D/W M/Y	B/A	Key Date Type
To Do	Put the listing information into MLS	Mark Stepp	0	D	A	List Date
To Do	Enter Property Information into the Database	Mark Stepp	0	D	A	List Date
To Do	Put the sign in the yard	Mark Stepp	1	D	A	List Date
To Do	Put the lockbox on the door	Mark Stepp	1	D	A	List Date
Email	Send email to Seller introducing our team	Mark Stepp	2	D	A	List Date
Email	Send weekly email status to Seller	Mark Stepp	1	W	A	List Date
Email	Send email to seller to re-list with recommended changes	Mark Stepp	7	D	B	Exp Date
To Do	Make sure we have re-listed	Mark Stepp	0	D	B	Exp Date
To Do	Post Expiration Clean-up	Mark Stepp	1	D	A	Exp Date

Workflow Worksheet Key:

Type: Anniversary, Appointment, Birthday, BombBomb, Call, Email, Follow Up, Meal, Meeting, Text, To Do, Travel

Assigned To: You or your other team members. In the examples above I only use Mark Stepp but any user can be assigned to this field or select a placeholder (listed below) which gives the ability to select the "Assigned To" field when the workflow is started. When using "Record Owner" the system will default the "Assign To" to the owner of the record that the workflow is being applied to.

- Agent
- Assistant
- Broker
- Buyer Agent Assistant
- Buyer Transaction Coordinator
- Buyers Agent
- Closing Coordinator
- Inside Sales Associate
- Listing Agent
- Listing Agent Assistant
- Listing Coordinator
- Marketing Assistant
- Open House Host
- Record Owner
- Seller Transaction Coordinator
- Showing Coordinator
- Team Leader
- Transaction Coordinator

D / W / M / Y: Days / Weeks / Months / Years

B / A: Before / After

Key Date Type:

- **Contact**
  - Start Date, End Date, Completion Date
  - Birth Date
  - Home Purchase Anniversary
  - Home Sale Anniversary
  - Referred Date
  - Referred To Date
  - Relationship Anniversary
  - Last Call Date
  - Last Email Date
  - Last Personal Visit Date
  - Last Personal Note Date
  - Next Appointment Date
  - Postpone Contact Date

- **Property**
  - Start Date, End Date, Completion Date
  - Acquisition Close Date
  - Brochure Delivery Date
  - Broker Open Date
  - Builder Approval Date
  - Coming Soon Rider Installed Date
  - Date in MLS
  - Date in Realtor com
  - Date in Trulia
  - Date in Zillow
  - Expiring Date
  - Ground Rent Due Date
  - House Cleaning Date
  - Last Sold Date
  - Lease End Date
  - Listing Agreement Signed Date
  - Listing Agreement Signed Received Date
  - Listing Agreement To Seller Date
  - Listing Appointment Date
  - Listing Date

- Marketing Agreement Date
- Measurement Date
- MLS Target Date
- Offer Submitted Date
- Open House Date
- Order Coming Soon Rider Date
- Order Intake Date
- Order Photos Date
- Photography Date
- Photos Received Date
- Photos Rescheduled Date
- Pre-Listing Home Inspection Date
- Pre Marketing Date
- Price Reduction Date
- Print Advertising Date
- Relisted Date
- Sign Install Date
- Sign Ordered
- Staging Date
- Staging Preview Date
- TV Advertising Date
- Virtual Tour Date
- Withdrawn Date

- **Transactions**
  - Start Date, End Date, Completion Date
  - Acceptance Date
  - Acceptance Deadline Date
  - Agent Evaluation Date
  - Alternative Earnest Deadline Date
  - Application Deadline Date
  - Appraisal 2 Comps Sent Date
  - Appraisal 2 Date
  - Appraisal Contingency Date
  - Appraisal Date
  - Appraisal Deadline Date
  - Appraisal Objection Deadline Date
  - Appraisal Ordered Date
  - Appraisal Received Date
  - Appraisal Resolution Deadline Date
  - Appraiser Inspection Of Lender Repairs Date
  - Association Application Due Date
  - Association Approval Deadline
  - Attorney Contingency Date
  - Attorney Review Date
  - Builder Approval Date
  - Buyer Attorney Approval Date
  - Buyer Grant Received Date
  - Buyer Referral Date
  - Buyer Settlement Date
  - Buyer Signed Contract Date
  - Certificate Of Occupancy Date
  - Checklist Received Date
  - Checklist Sent Date
  - Chimney Inspection Contingency Date
  - Chimney Inspection Date
  - City Inspection Date
  - Clear to Close Date
  - Closing Date
  - Closing Document Delivery Deadline Date
  - Closing Target Date
  - Commission Approved Date
  - Commitment Deadline Date
  - Comps Sent To Appraisers Date
  - Conditional Sale Deadline Date
  - Condo Docs Objection Deadline Date
  - Condo Docs Received Date
  - Condo Docs Requested Date
  - Contingency Date
  - Contingent Sale Close Date
  - Contingent Sale Contract Date
  - Contract Date
  - Contract Expiration Date
  - Credit Information Deadline Date
  - Credit Information Disapproval Deadline Date
  - Credit Ordered Date
  - Credit Received Date
  - Date Funded
  - Delivery of Earnest Money Date
  - Disclosure Received Date
  - Due Diligence Documents Delivery Deadline Date
  - Due Diligence Documents Objection Deadline Date
  - Due Diligence Documents Resolution Deadline Date
  - Due Diligence Expiration Date
  - ECAD Due Date
  - Effective Date
  - Environmental Inspection Date
  - Existing Loan Documents Deadline Date
  - Existing Loan Documents Objection Deadline Date
  - Fell Through Date
  - Final Walkthrough Date
  - Finance Deadline Date
  - Financial Commitment Date
  - Financing Contingency Date
  - Financing Credit Approval Date
  - Fire Inspection Date
  - First Earnest Due Date
  - Fully Executed Home Inspection Received Date
  - Gas Inspection Date

- Gas Inspection Resolution Date
- Geological Inspection Date
- Ground Rent Due Date
- Guarantor Signature Date
- Head Landlord Approval Date
- HOA Docs Delivered Date
- HOA Docs Ordered Date
- HOA Documents Deadline Date
- HOA Documents Objection Deadline Date
- HOA Due Date
- Home Inspection Contingency Date
- Home Inspection Date
- Home Inspection Repairs Completed Date
- Home Inspection Repairs Receipts Received Date
- Home Inspection Report Received Date
- Homeowner's Insurance Received Date
- Home Warranty Ordered Date
- House Cleaning Date
- HUD Received Date
- HUD Reviewed Date
- Identification Contingency Date
- Income/Credit Verification Date
- Initial Contact Date
- Inspection Contingency Exp Date
- Inspection Objection Deadline Date
- Inspection Resolution Deadline Date
- Last Inspection Date
- Lead Paint Contingency Date
- Lead Paint Inspection Date
- Lease Agreement Date
- Lease End Date
- Lease Signed Date
- Lease Start Date
- Lender Apply By Date
- Lender Appraisal Date
- Lender Required Repairs Completed Date
- Lender Respond Date
- Loan Application Date
- Loan Application Due Date
- Loan Approval Date
- Loan Commitment Due Date
- Loan Commitment Received Date
- Loan Objection Deadline Date
- Loan Transfer Approval Deadline Date
- Mold Inspection Contingency Date
- Mold Inspection Date
- Mortgage Approval Date
- Move In Date
- Move Out Date
- Notice Date
- Offer Delivery Date
- Offer Expiration Date
- Off-Record Title Deadline Date
- Off-Record Title Objection Deadline Date
- Option Expiration Date
- Percolation Test Contingency Date
- Percolation Test Date
- Pest Inspection Date
- Pool Inspection Date
- Possession Date
- Pre Approval Letter Due Date
- Preliminary HUD Reviewed Date
- Private Financing Deadline Date
- Processing Sent Date
- Projected Close Date
- Projected Move Out Date
- Property Insurance Objection Deadline Date
- Purchase Agreement Date
- Radon Contingency Date
- Radon Drop Date
- Radon Pickup Date
- Ratification Date
- Record Title Deadline Date
- Record Title Objection Deadline Date
- Reinspection Due Date
- Renewal Date
- Repair Agreement Date
- Repairs Completed Date
- Repairs Due Date
- Resale Cert Due Date
- Retrofit Inspection Date
- Right of First Refusal Deadline Date
- Roof Inspection Date
- Sale of Buyer's Home Date
- Satisfaction of Inspection Contingency Date
- Second Earnest Due Date
- Seller Attorney Approval Date
- Seller Disclosure Due Date
- Seller Referral Date
- Seller Response To Home Inspection Received Date
- Seller Settlement Date
- Septic Inspection Contingency Date
- Septic Inspection Date
- Sewer Inspection Date
- Sewer Scope Date
- Short Sale Acceptance Date
- Smoke Certification Inspection Date
- Smoke Certification Received Date
- Staging Removal Date
- Status Certificate Contingency Date
- Status Certificate Delivered to Lawyer Date
- Status Certificate Ordered Date
- Structural Inspection Date
- Survey Contingency Date
- Survey Date
- Survey Deadline Date
- Survey Objection Deadline Date
- Survey Resolution Deadline Date

- Termite Inspection Contingency Date
- Termite Inspection Date
- Termite Report Received Date
- Testimonial Received Date
- Testimonial Requested Date
- Third Party Approval Date
- Title Commitment Due Date
- Title Ordered Date
- Title Received Date
- Title Resolution Deadline Date
- Title Signing Date
- Under Contract Sign Installed Date
- Underwriting Condition Date
- Verification of Funds Due Date
- Water Inspection Date
- Well Inspection Contingency Date
- Well Inspection Date
- Windstorm Inspection Date

A Basic Workflow Example:

Every real estate agent at one time or another will have a new listing unless you are concentrating solely on buyers. A standardized “New Listing Agreement” workflow will be one of the most used systems in your bag of tricks. Take the time to create a detailed workflow that works the way you work. Think about every step that you do for your clients through the listing process and write down everything step from the most trivial to the most important. The example below only uses 9 steps to introduce key topics, however, a workflow for a typical listing agreement could be 40 or more steps. There is no limit to the number of activities in a workflow; it can be made as brief or detailed as needed in order to get the job done.

Workflow Title: **New Listing Agreement**
Use With: **Property**

Activities 1 - 9 below show a calculation method and brief description

1: 0 Day(s) After Listing Date - Put the listing information into MLS
2: 0 Day(s) After Listing Date - Enter Property Information into the Database
3: 1 Day(s) After Listing Date - Put the sign in the yard
4: 1 Day(s) After Listing Date - Put the lockbox on the door
5: 2 Day(s) After Listing Date - Send **email** to Seller introducing our team
6: 1 Week(s) After List Date - Send weekly **email** status to Seller
7: 7 Day(s) Before Expiration Date - Send **email** to seller to re-list with recommended changes
8: 0 Day(s) Before Expiration Date - Make sure we have re-listed / send correct **email** either way.
9: 1 Day(s) After Expiration Date - Post Expiration Clean-up

TIP: Once a workflow has started for a particular Contact, Property or Transaction, it can’t be changed without removing it and starting again so take your time in the beginning to get the workflow setup correctly.

Explaining the Basic Workflow Example:

Let me explain in detail the example activities above using only step 5 in the list above.

2 Day(s) After Listing Date - Send email to Seller introducing our team

- Count / Count type: The specific number of Days, Weeks, Months or Years used to calculate a date.

  *On step 5, I send an email to introduce the team, the count is the number "**2**" and the count type is "**Days**".*

- Count Direction: Used to adjust the count in a positive or negative direction

  - **AFTER** - meaning **ADDING** a specific number of days to a specified key date
  - **BEFORE** - meaning **SUBTRACTING** a specific number of days from a specified key date

  *On step 5, I used the Count direction of "**After**"*

- Two Key Dates are used in the workflow above to calculate activities; **List Date** and **Expiration Date**. The Key Dates are typically located in a contact, property or transaction record of the database and will usually contain different values. Since the formula for calculating the workflow steps are always the same, the system uses the Key Dates to accurately populate your personal calendar in a systematic approach..

  - **Listing Date** - For this example I will use a list date of 7/1/2015, which is a database field in the Property record.
  - **Expiration Date -** For this example I will use an expiration date of 12/31/2015 which is another field in the Property record of the database.

  *On step 5, I used the key date field: "**Listing Date**"*

When putting it all together, it comes out as "**2 Days After Listing Date**". The workflow activity is now setup generic enough that no matter when the property is listed, the system will know when it needs to send the introduction email. Setting up each step of the workflow in a similar manner will help make you more organized and efficient. There is no need to remember when things have to be done because the system will remind you when and in many cases, do it for you.

Now look at each activity individually to see how the date is computed:

- **Activities 1 & 2**: Calculated due date = 0 Days After Listing Date.
    - This means that (zero) 0 days will be ADDED to the listing date to calculate the due date of the activity.
    - If the Listing date is 7/1/2015 then activities 1 & 2 be calculated as 7/1/2015 because we are adding 0 days to the actual Listing date.

- **Activities 3 & 4**: Calculated due date = 1 Day After Listing Date.
    - This means I ADD 1 day to the listing date to calculate the due date of the activity.
    - If the Listing Date is 7/1/2015 then activities 3 & 4 will be calculated as 7/2/2015

- **Activity 5**: Calculated due date = 2 Days After Listing Date.
    - This means I ADD 2 days to the listing date to calculate the due date of the activity.
    - If the Listing Date is 7/1/2015 then activity 5 will be assigned to 7/3/2015

- **Activity 6**: Calculated due date = 1 Week After Listing Date
    - Using 1 Week is exactly the same as 7 Days - either can be used
    - This means 7 days are ADDED to the listing date to calculate the due date of the activity.
    - If the Listing Date is 7/1/2015 then activity 6 will be calculated as 7/8/2015

- **Activity 7**: Calculated due date = 7 Days Before Expiration Date.
    - I could have specified 1 Week Before Expiration Date to get the same result
    - This means 7 ways are SUBTRACTED from the Expiration date to calculate the due date of the activity.
    - If the Expiration Date is 12/31/2015 then Activity 7 will be calculated as 12/24/2015

- **Activity 8**: Calculated due date = 0 Days Before Expiration Date
    - I could have specified 0 Days After Expiration to get the same result
    - This means 0 days are Subtracted from the Expiration date to calculate the due date of the activity.
    - If the Expiration Date is 12/31/2015 then Activity 8 will be calculated as 12/31/2015

- **Activity 9**: Calculated due date = 1 Day After Expiration Date.
    - This means I ADD 1 day to the Expiration date to calculate the due date of the activity.
    - If the Expiration Date is 12/31/2015 then activity 9 will be calculated as 1/1/2015

Expanding the Basic Workflow Example:

In the previous section I described a 9 activity basic workflow for a New Listing. In this next section I will use the same 9 activity workflow with added details to refine each step and in some cases automate the process to allow the system to perform the action for us.

1: 0 Day(s) After Listing Date - Put the listing information into MLS

- Order: **1**

2: 0 Day(s) After Listing Date - Enter Property Information into the Database

- Order: **2**
- Tag: **Add** / **Active Listing**

3: 1 Day(s) After Listing Date - Put the sign in the yard

- Order: **1**

4: 1 Day(s) After Listing Date - Put the lockbox on the door

- Order: **2**
- Tag: **Add** / **Lockbox**

5: 2 Day(s) After Listing Date - Send email to Seller introducing our team

- Action: **Send Automatically** / **Send an Email message**
- Message: **Team Member Introduction**
- Party Member: **Seller**

6: 1 Week(s) After List Date - Send weekly email status to Seller

- Repeat: **Weekly (Every 7 Days)**
- Action: **Send Automatically** / **Send an Email message**
- Message: **Weekly Seller Status**

7: 7 Day(s) Before Expiration Date - Send email to seller to re-list with recommended changes

- Action: **Send manually (with preview)** / **Send an Email message**
- Message: **Recommended Changes**
- Tag: **Add** / **Expiring Soon**

8: 0 Day(s) Before Expiration Date - Make sure we have re-listed

Branch: Gives you the option to choose from multiple paths

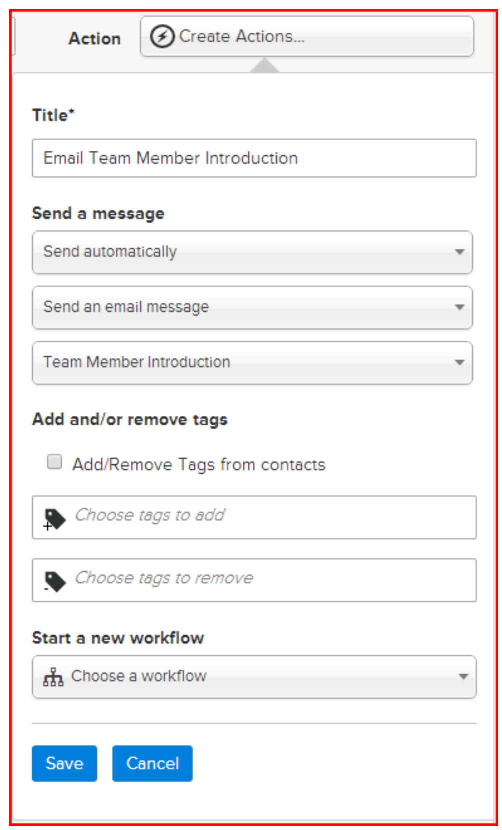
- Seller Relisted: They choose to re-list the property with me
    - Action: **Send manually (with preview)** / **Send an Email message**
    - Message: **Thank You for re-listing**
    - Tag: **Remove** / **Expiring Soon**
    - Start Workflow: **Extended Listing Agreement**
- Seller Did Not Relist: They chose to not re-list the property with me
    - Action: **Send manually (with preview)** / **Send an Email message**
    - Message: **Post Expiration Survey to Seller**
    - Tag: **Add** / **Withdrawn, Expired**
    - Tag: **Remove** / **Active Listing**
    - Start Workflow: **Post Expiration Clean-up**

9: 1 Day(s) After Expiration Date - Post Expiration Clean-up

Checklists: Gives you the ability to define a list of checklist items that MUST BE completed in order for the activity to be considered completed.

- Remove Seller's Phone From MLS
- Remove Sign From Sellers Property
- Remove Lockbox From Property

Explaining the Expanded Workflow Example:

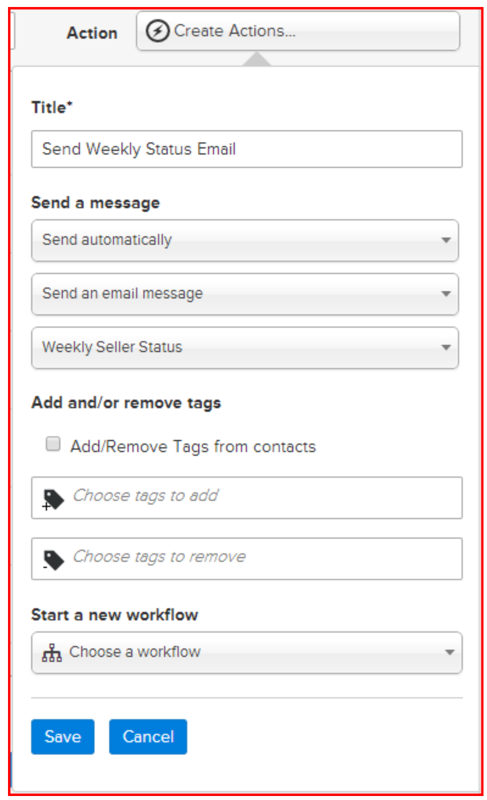


Let me explain the added details of the example activities above:

- **Activities 1 & 2**: Since both activities fall on the same calculated date - there may be a need for 1 activity to be done before the other. Using the ORDER field you can define the order in which same date activities are completed.
- **Activity 2**: Using the Add Tag Action I can automatically assign the tag "Active Listing" to the Property.
- **Activities 3 & 4**: Another example of ORDER since both activities have the same calculated due date.
- **Activity 4**: Again, using the Add Tag Action to indicate the property has a "Lockbox" attached to the property.

- **Activity 5**: Sending an email manually can be a time consuming process and often forgotten or put off during extremely busy times. Setting up an automated email action can be as simple as creating a standardized email which incorporate merge fields which pull data from the database and saving it to a message library.   In this case I will send an email to the seller from our email library which introduces the team. It provides basic contact information to the seller, complete with photo's and after hour phone numbers so when emergencies happen they know who to call and reduces the stress the seller feels during the listing process. The only time the email needs to be edited is when new team members are added or old team members leave.

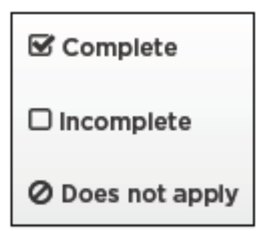
- **Activity 6**: Some Activities such as status emails can be set up to repeat on any regular interval. In this case, I set the action to send the "Weekly Seller Status" to update the seller on what happened with their property that week. The status information is pulled from the database using a merge field and sent automatically. By setting the "**Send Automatically**" indicator, the email is sent without your interaction which prevents mistakes and delays.



- **Activity 7**: This activity is designed to do 2 things:
    - Send an email from the message library titled "Recommended Changes" - The **Manually Send (With Preview)** can be set so that you are given the opportunity to manually enter recommendations to make the property marketable.
    - Add Tag automatically assigns "Expiring Soon" to the property. This gives you the ability to quickly see all listings that will expire soon.

- **Activity 8**: This activity introduces a feature called "Branching" - Branching allows you to choose from two or more action paths. In this case you are presented with a menu of 2 choices "Seller Relisted" and "Seller Did Not Relist". Once selected, the appropriate actions for the selected choice will then be activated and the branch is considered activated.
    - If "Seller Relisted" is selected
        - The system will Send a "Thank You for re-listing" email
        - It automatically removes the tag "Expiring Soon" so that the property will no longer be displayed when viewing "Expiring Soon" list.
        - It will then start a new workflow series titled "Extended Listing Agreement" which does similar but different activities.
    - If "Seller Did Not Relist" is selected
        - The system will send a "Post Expiration Survey to Seller" email
        - It automatically removes the tag "Active Listing"
        - It automatically adds the tags "Withdrawn" and "Expired"
        - Start the "Post Expiration Clean-up" workflow

- **Activity 9**: This activity should ONLY be available if the seller did not relist the property. If I continue to have it as a 9th activity in the current workflow, the system will show the activity your calendar even if the property is relisted.. The activity could be deleted manually knowing that the property is relisted. The other option is to set up an additional "Post Expiration Clean-up" workflow and include this activity in that workflow which adds activities to your calendar only when the property failed to sell and the seller did not re-list. Either option will work but the second option takes more setup but causes confusion.
    - The important part of Activity 9 is that it contains a Checklist. Each item in the checklist must be "checked off" or marked as "Does not apply" in order for the activity as a whole to be completed. In this case there are 3 checklist items:
        - Remove Seller's Phone From MLS
        - Remove Sign From Seller's Property
        - Remove Lockbox From Property



    - Once there are zero "Incomplete" items, the activity is considered completed. You can have any combination of "Complete" or "Does not apply" as long as there are NO "Incomplete" items.

In the 9 sample activities above there are 4 activities with emails that need to be sent (steps 5, 6, 7 & 8). Step 8 will have the option of 2 emails, one for thanking the seller for re-listing and the second as a survey if they do not re-list. For the emails that need to be sent we will setup templates.

What is a Template?

A template is nothing more than a pre-designed Email, SMS text, Facebook, Twitter or LinkedIn message that can be sent to contacts at any time. Instead of writing a new message each time you communicate with your contact, simply pick a template containing the message you want to your contact to receive and send it. This can be done individually using the email feature in Realvolve or by using an action on a workflow activity. Setting up the standardized message is as easy as writing it from scratch except that you include merge fields that get filled in to personalize the message before it is sent. Most messages will contain the current date, a greeting and then the body of the message itself. There is a full list of all merge fields in Appendix B of this document.

There are two requirements that you have to know before making the template.

1. What kind of data will be used? Templates can use data from 3 different places:
   - Contacts
   - Properties
   - Transactions

   Knowing what kind of data you will be sending will determine the choice above. If you are just sending the message to a contact and it has nothing to do with a property or transaction then Contacts will make the most sense. Obviously if you are discussing information about a Property or Transaction then you will choose the appropriate option. The requirement determines which merge fields will be available in the menu of merge fields as you are designing them. I will go into more detail on creating templates in the next section.

2. What method of distribution will be used?
   - Email
   - SMS Text
   - Facebook Message
   - Twitter Message
   - LinkedIn Message

   Each message type has it’s own characteristics such as subject and message size.

Creating Templates

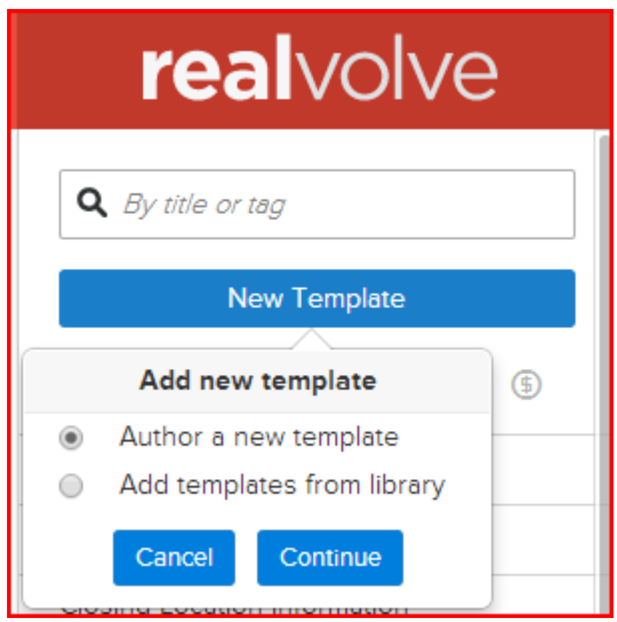
Setting up the templates for specified activities prior to setting up the Workflow will make the process flow easier. There will be places to select which email templates you need to send on an action and without the templates in place you will have challenges completing the workflow activity setup. Take the time now to create the Templates as needed.

TIP: Open a SECOND Realvolve TAB in your browser to make your templates – that way you don’t have to close the workflow when you need to make a new template.

To create templates click on **TEMPLATES** from the top

menu

Then click on **New Template** > **Author a new template** > **Continue**



Template Filters

Under the **New Template** button are a series of Filter icons. Click on the filter icons to limit the list of viewable templates.

As you click on each filter icon it will turn Dark to indicate that it is selected. All templates in your system will display if ALL filter icons are selected or if ALL filters are turned off.

TIP: If you are missing templates from your list, check to see if any of the filter icons are turned ON (Dark) which would limit the list of available templates shown.

The filter icons are divided into 2 groups:

Template Types:

- Email Templates
- SMS Text Templates
- Facebook Message Templates
- Twitter Message Templates
- LinkedIn Message Templates

Template Locations:

- Contact Messages
- Property Messages
- Transaction Messages

Any combination of filters can be used. By selecting both and would limit the list of templates to just Email templates for properties.

Template Editor

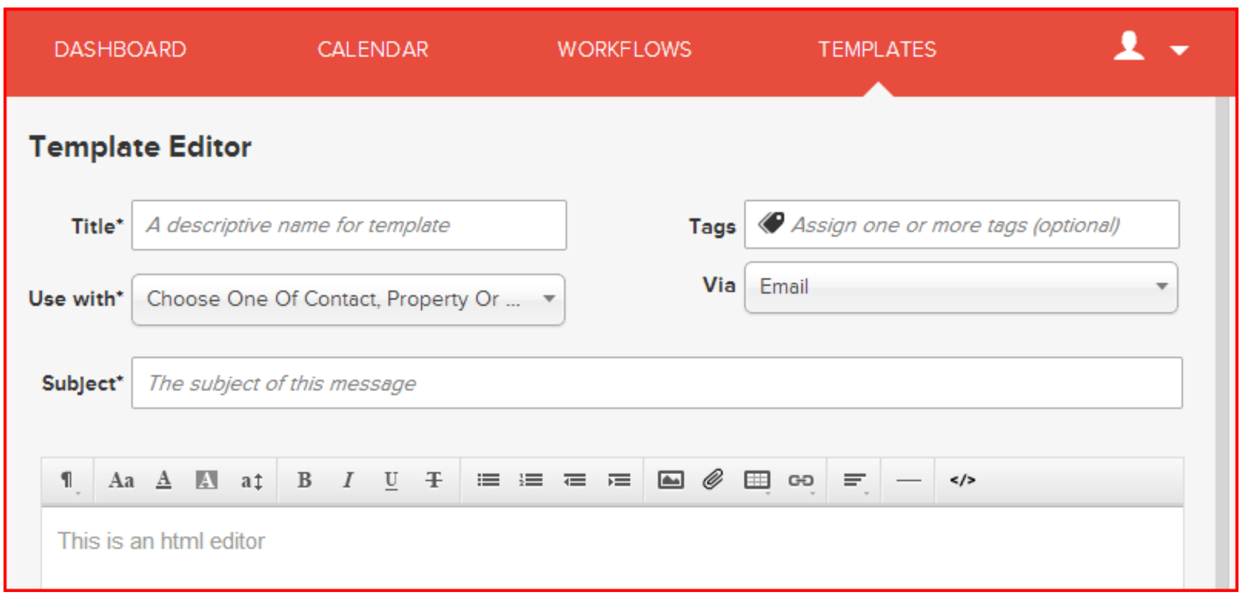
At the top of the Template Editor you must specify information in the following fields.

Title: Name the template (used internally for menu selection)

Use with: Specify which section of the Realvolve software that the template will be used. Choices are: Contact, Property or Transaction. This determines which merge fields will be available when you type 2 brackets “[[“ and the field selection menu is displayed.

Via: Select how this template will be sent. Choices are Email, Facebook, Linkedin, SMS or Twitter Message. Each message type has different requirements on maximum size and features. Emails can have images and attachments where other options are Text only.

Subject: Emails require a subject of the message, other message types do not.

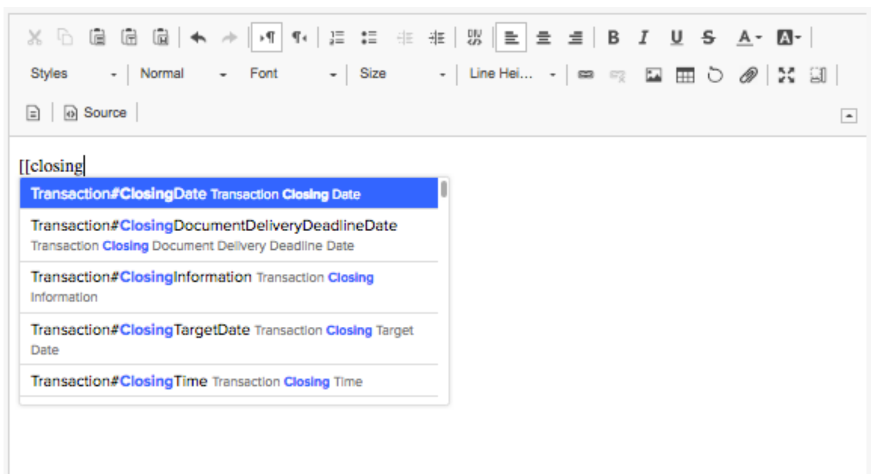


The TAGS field is optional but can be useful when searching for specific templates by keyword. I would recommend that you use keywords to help organize your templates from the beginning. Over time, you will create an extensive number of templates that could make it difficult to find without specific Keywords. Use Tags like “Thank You” for any type of Thank You letters or “Listing Expiration” for any templates dealing with expiration of a listing.

Merge Fields:

Each template that you create can use an unlimited number of Merge Fields. A Merge field is a placeholder that gets filled in with information from the database when the document is sent. The most important thing to understand is that the list of valid merge fields will be determined by the “Use With” field located in the upper section with the template setup. Selecting “Contact” will allow only the fields from a contact record. Use with “Property” will only show the Property or Listing fields, and “Transaction” will allow only the transaction fields. So understanding where your data will be coming from is important.

Merge fields can be placed in both the subject line and the body of the message. Simply place your cursor where you want the merge field to be placed and then type 2 bracket keys “[[“ this will display a list of merge fields that you can choose from. As you continue to type after the double brackets, the system will search the list for database field names that contain the text you are typing. If you type “[[closing” then the list will show all fields containing the word “closing” as shown below.



You can then scroll down through the list to click on the correct field you want displayed in your document. Once you select the field the entire field name will be displayed in the template which ends with double ending brackets “]]” like this: [[Transaction#ClosingTime]]

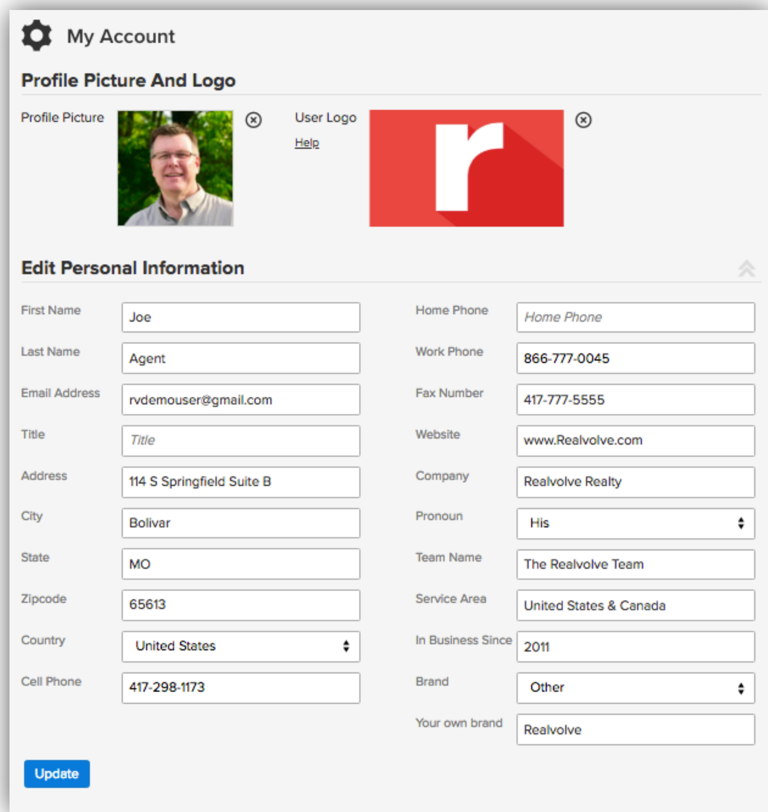
A complete list of Merge fields can be found in **Appendix B**

There are a few special merge fields shown below:

[[Current Date]]	Fills in the current date
[[Property#SellerReport]]	All Seller Report Items in List
[[Property#SellerReport-SentOnly]]	Seller Report Items Previously Sent
[[Property#SellerReport-NonSentOnly]]	Seller Report Items Not Already Sent
[[Activity:Checklist#All]]	Include All Activity Checklist Items
[[Activity:Checklist#Completed]]	Include Only the Completed Activity Checklist Items
[[Activity:Checklist#Incomplete]]	Include Only the Incomplete Activity Checklist Items
[[Activity:Checklist#Removed]]	Include Only the Removed Activity Checklist Items

CurrentUser / PrimaryUser Merge Fields

Edit your personal information in **Settings** > **My Account** for User specific merge fields.



First Name = [[CurrentUser#FirstName]]
Last Name = [[CurrentUser#LastName]]
Email Address = [[CurrentUser#EmailAddress]]
Title = [[CurrentUser#Title]]
Address = [[CurrentUser#Address]]
City = [[CurrentUser#City]]
State = [[CurrentUser#State]]
Zipcode = [[CurrentUser#Zipcode]]
Cell Phone = [[CurrentUser#CellPhone]]
Home Phone = [[CurrentUser#HomePhone]]
Work Phone = [[CurrentUser#WorkPhone]]
Fax = [[CurrentUser#Fax]]
Website = [[CurrentUser#Website]]
Company = [[CurrentUser#Company]]
Pronoun = [[CurrentUser#Pronoun]]
Team Name = [[TeamName]]
Service Area = [[ServiceArea]]
In Business Since = [[InBusinessSince]]
Years In Business = [[YearsInBusiness]]
User Photo = [[CurrentUser#Photo]]
User Logo = [[CurrentUser#UserLogo]]
Referral URL = [[CurrentUser#ReferralUrl]]

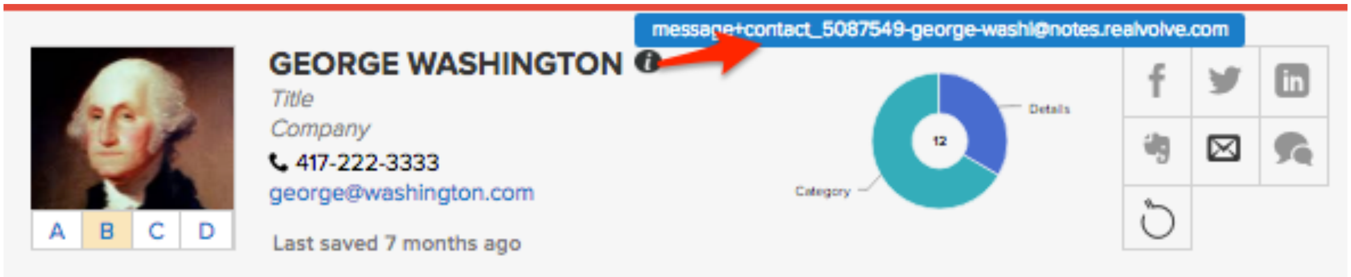
All sub-users can change their own “CurrentUser” fields.

The primary account holder has the ability to change the **[[TeamName]]**, **[[ServiceArea]]** and **[[InBusinessSince]]** fields. There is also a calculated field of **[[YearsInBusiness]]** which uses the current year minus the value in **[[InBusinessSince]]** to show the total years in business.

In Addition to the “CurrentUser” fields shown above there are merge fields that contains the primary account holder information with prefix of “PrimaryUser” instead of “CurrentUser”. So anytime you want to make sure to use the primary account holder’s email for example, you would use **[[PrimaryUser#EmailAddress]]**.

Dropbox Merge Fields

There are 3 special “Dropbox” email addresses that can be used – The email addresses can be found by hovering your mouse over the icon located next to the Contact Name, Property Address or Transaction Address – Any emails sent to this address will automatically be saved to the database record.

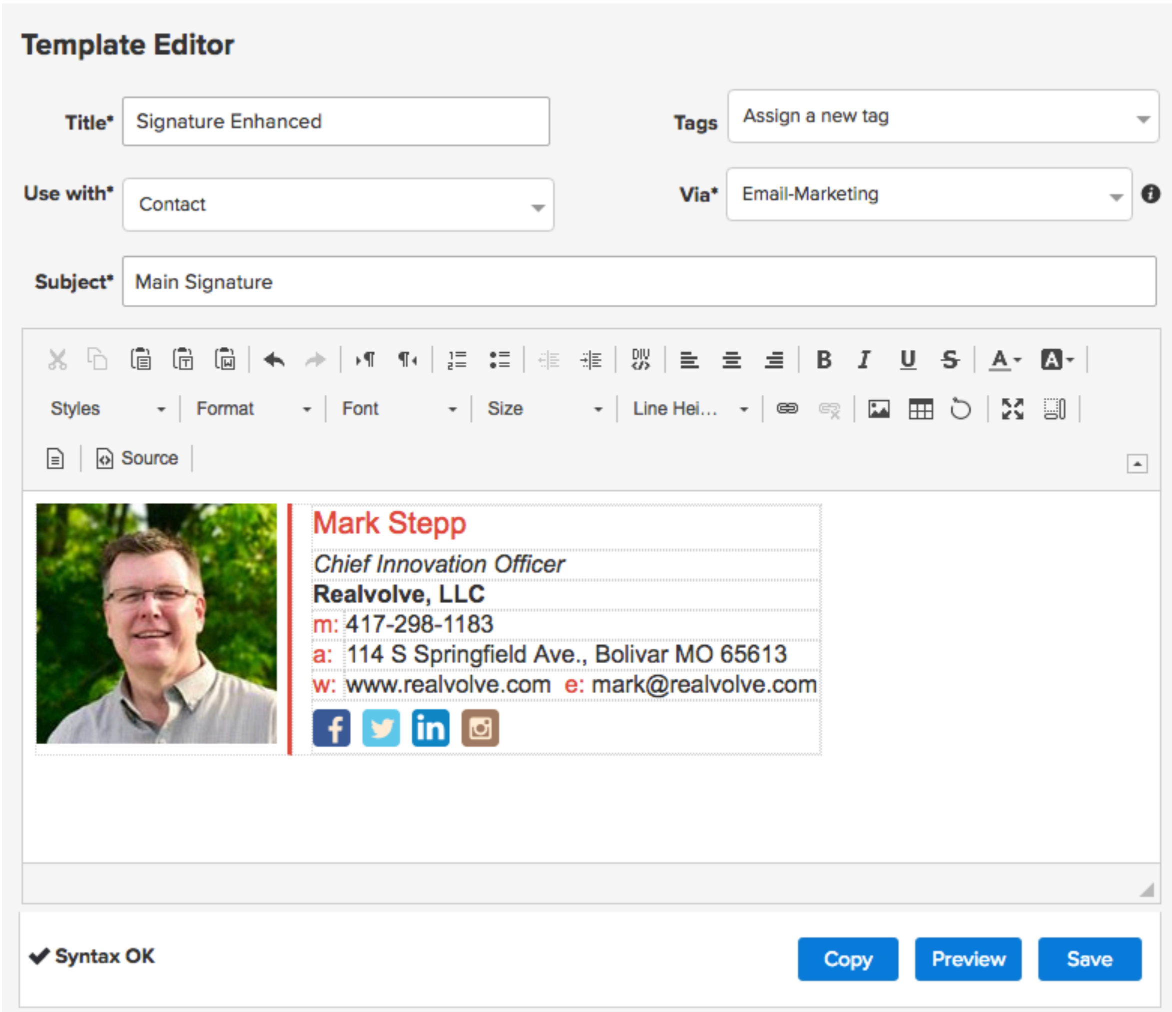


Contact Dropbox Email:	[[Contact#RealvolveEmailAddress]]
Property Dropbox Email:	[[Property#RealvolveEmailAddress]]
Transaction Dropbox Email:	[[Transaction#RealvolveEmailAddress]]

When sending emails to contacts that deal with Listings or Transactions – use the correct merge field above in the body of the email and instruct the contact to include the dropbox email address in the CC or BCC field so it will be automatically saved to the Listing or Transaction record.

Signature

[[Signature]] – Setup a special template that has the title of “Signature” for that to merge into the Signature field on any template.

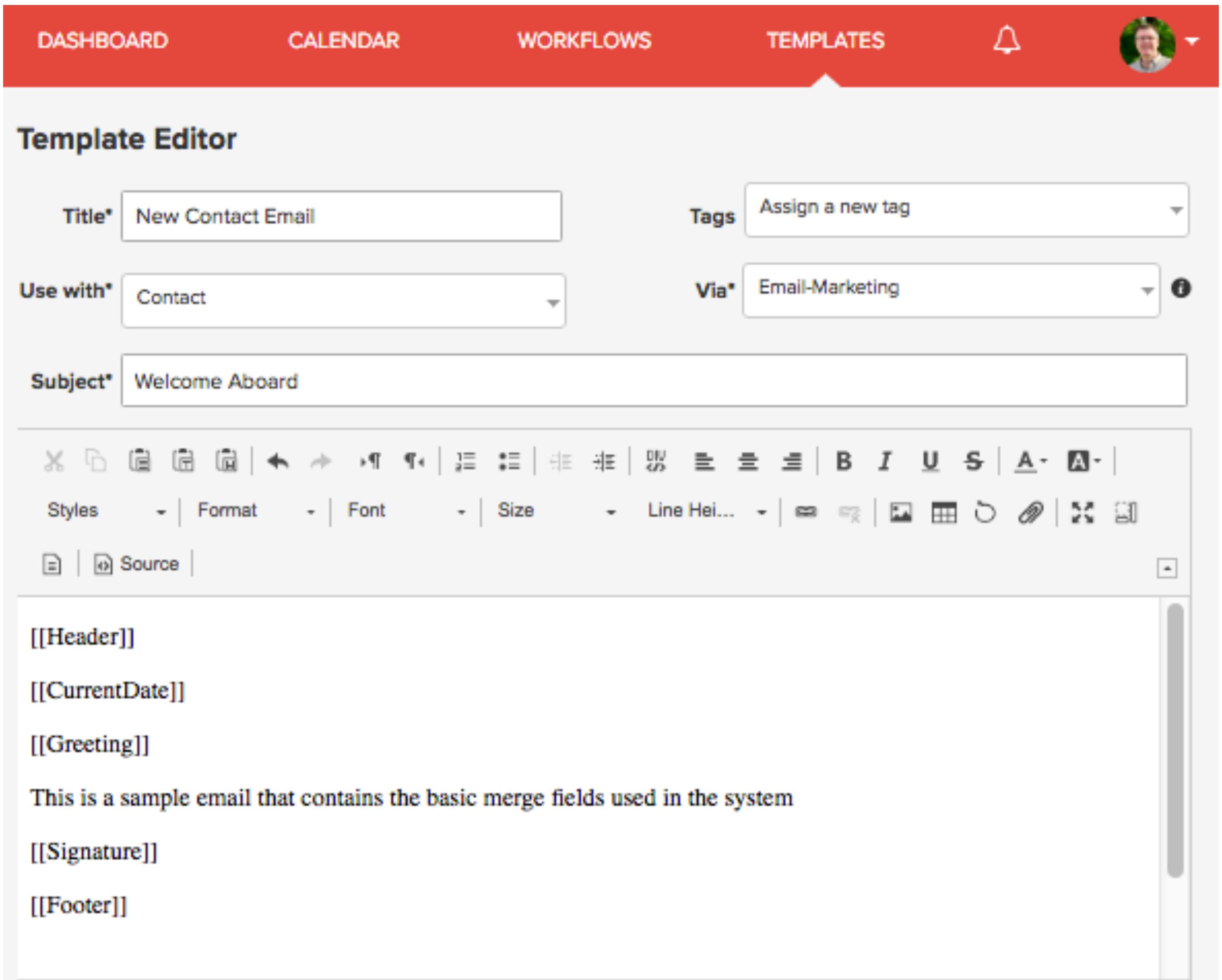


In some of the example templates of this document, I have used individual merge fields like **[[Property:SellerAgent#FirstName]]** which is fine… however, you can use the single merge field **[[Signature]]** and the entire contents of the ‘Signature’ template will be used in its place. This way you can use a common signature for all documents and if you need to make a change, you only need to do it once.

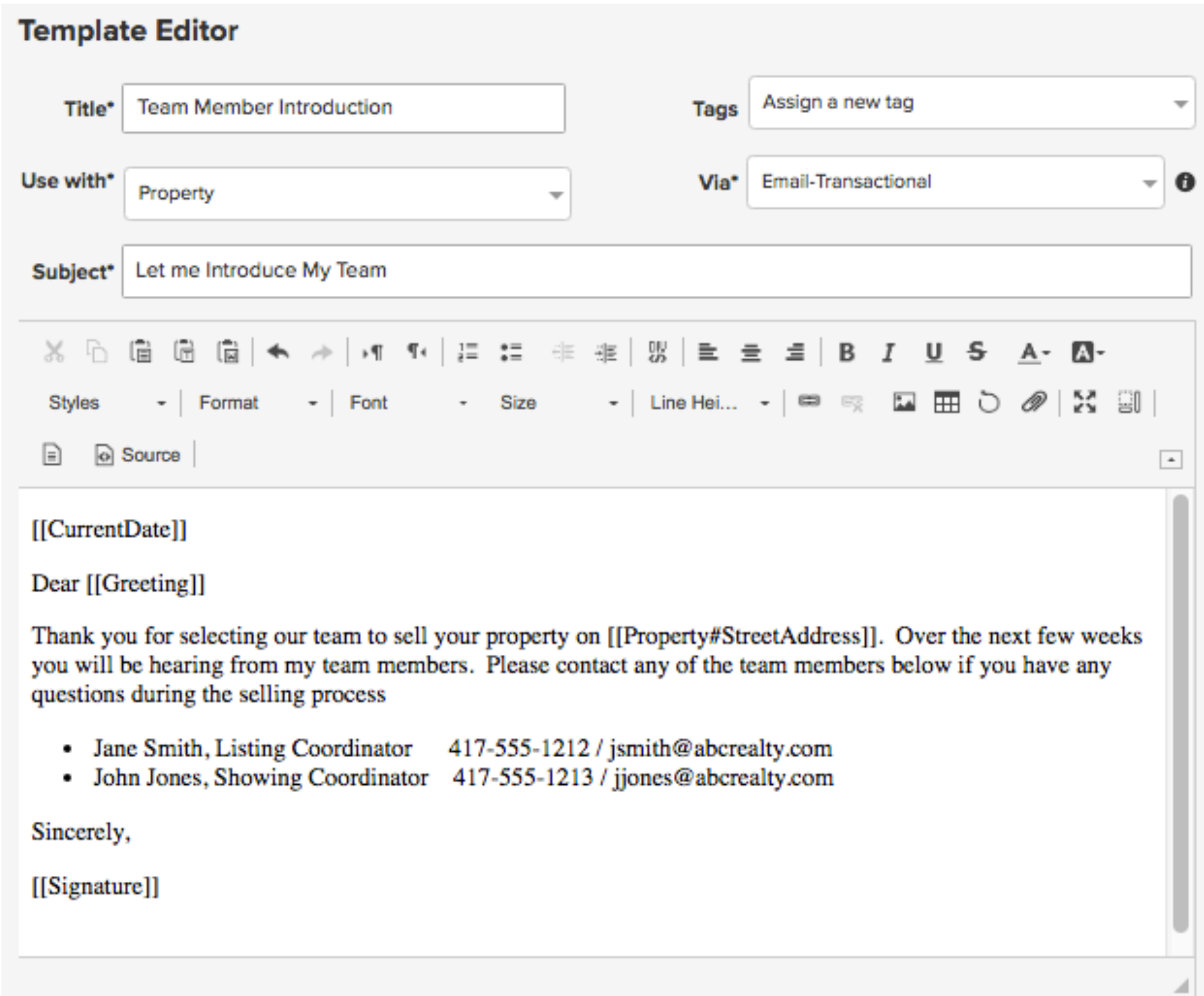
Header / Footer

Similar to the [[Signature]] field, Realvolve is capable of using both **[[Header]]** and **[[Footer]]** merge fields. Placing common information into a template with a title of **Header** or **Footer** allows standardized information in all email messages. If any of the common information changes for any reason then it is a simple process of changing the content in one place to take care of it everywhere the merge field is used. Be sure to only have one template named Header and one named Footer or you may get mixed results.

Both templates can contain any combination of Photos, Logos, Fonts.

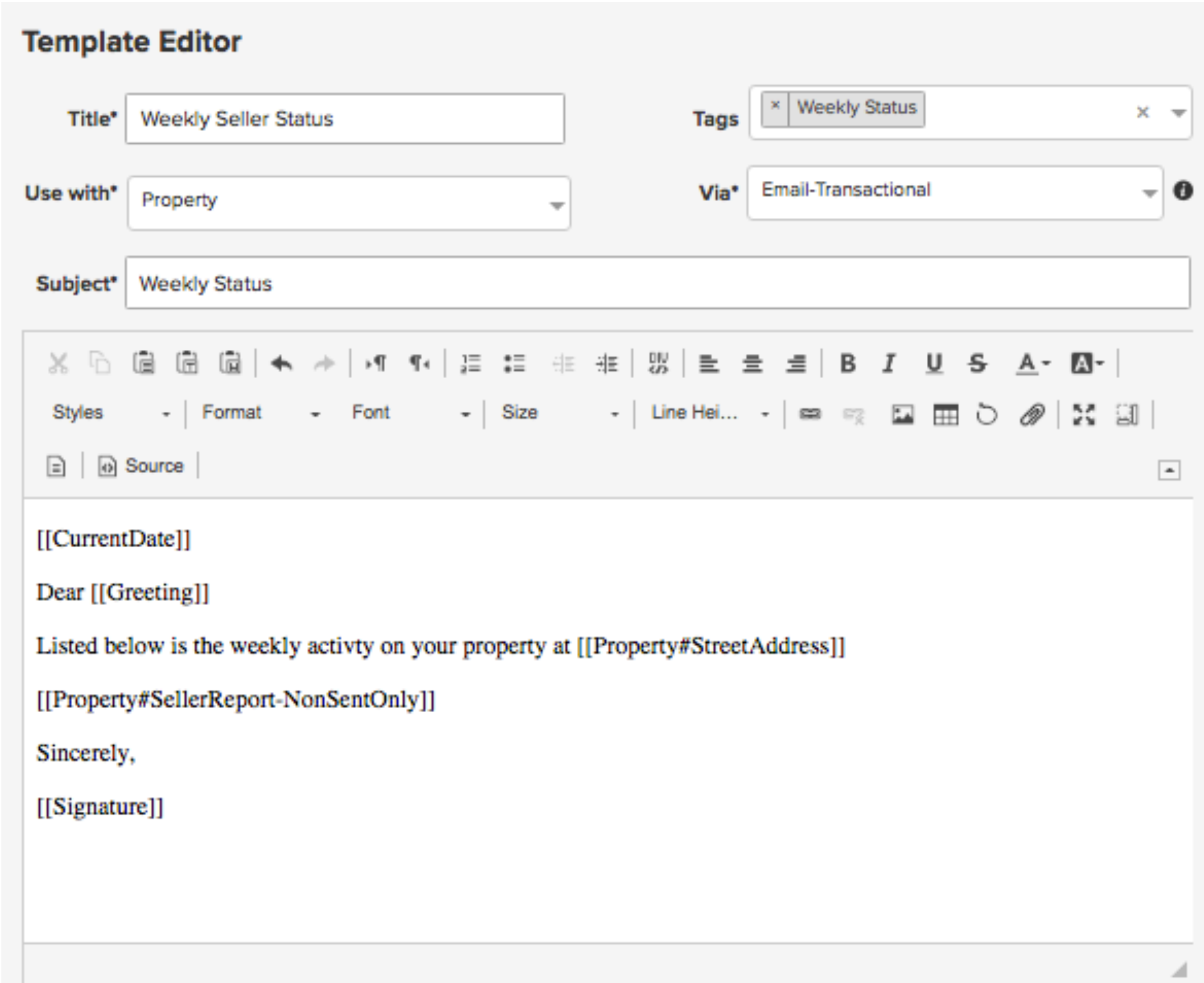


Email for Step 5: Team Member Introduction



Notice how I setup the merge fields for the **Current Date**, **Greeting**, **Street Address** as well as the **Signature**. The values of each of the fields will be assigned when the email is sent to its intended recipient.

Email for Step 6: Weekly Seller Status



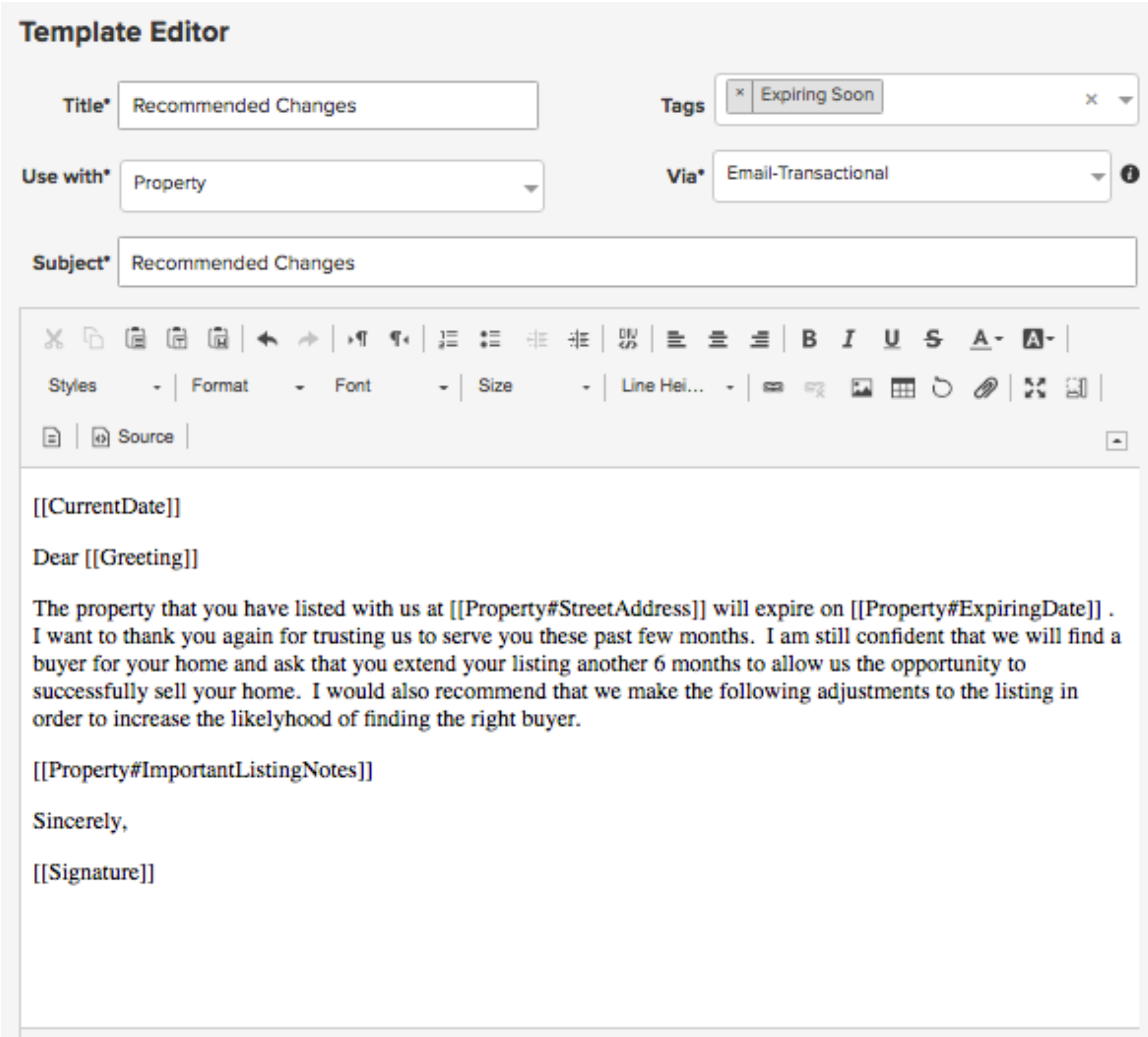
Again I have added merge fields for Current Date, Greeting, Street Address of the Listed Property and Selling Agent as well as a special merge field named [[Property#SellerReport-NonSentOnly]]. This special merge field is one of 3 special fields used to insert information from the Seller Report tab of the property. (See below)

Special Seller Report Merge Fields:

- **[[Property#SellerReport]]** - All Seller Report Items in List
- **[[Property#SellerReport-SentOnly]]** - Seller Report Items Previously Sent to Seller
- **[[Property#SellerReport-NonSentOnly]]** - Seller Report Items Not Already Sent to Seller

Visit our YouTube Channel and watch "Seller Reports using Workflows and Templates" to see more detail on using the Seller Report merge fields.

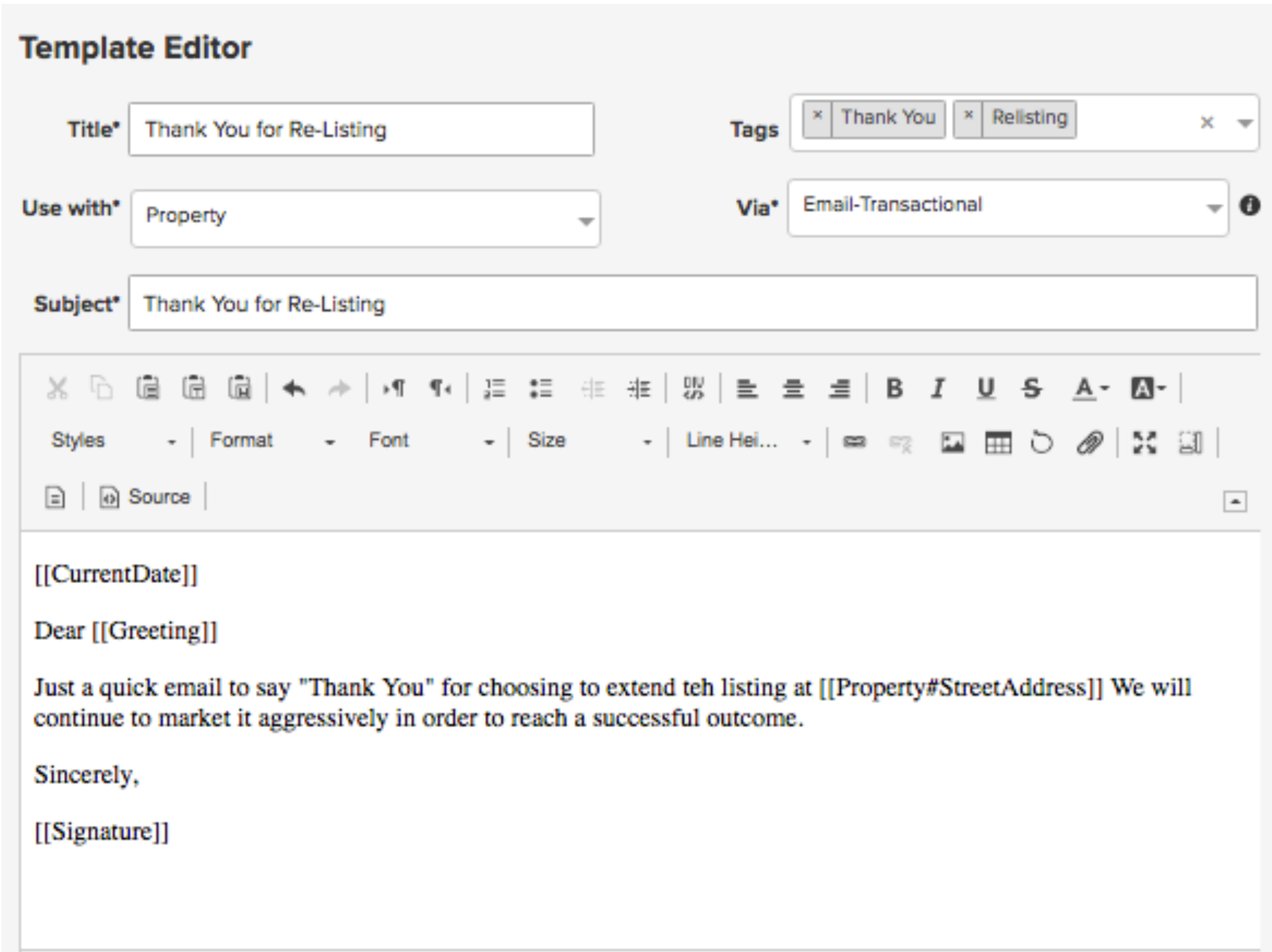
Email for Step 7: Recommended Changes



In addition to the normal fields from previous templates I have also included the **listing Expiration Date and Important Listing Notes** in order to automate the process and eliminate the need to edit the email before sending.

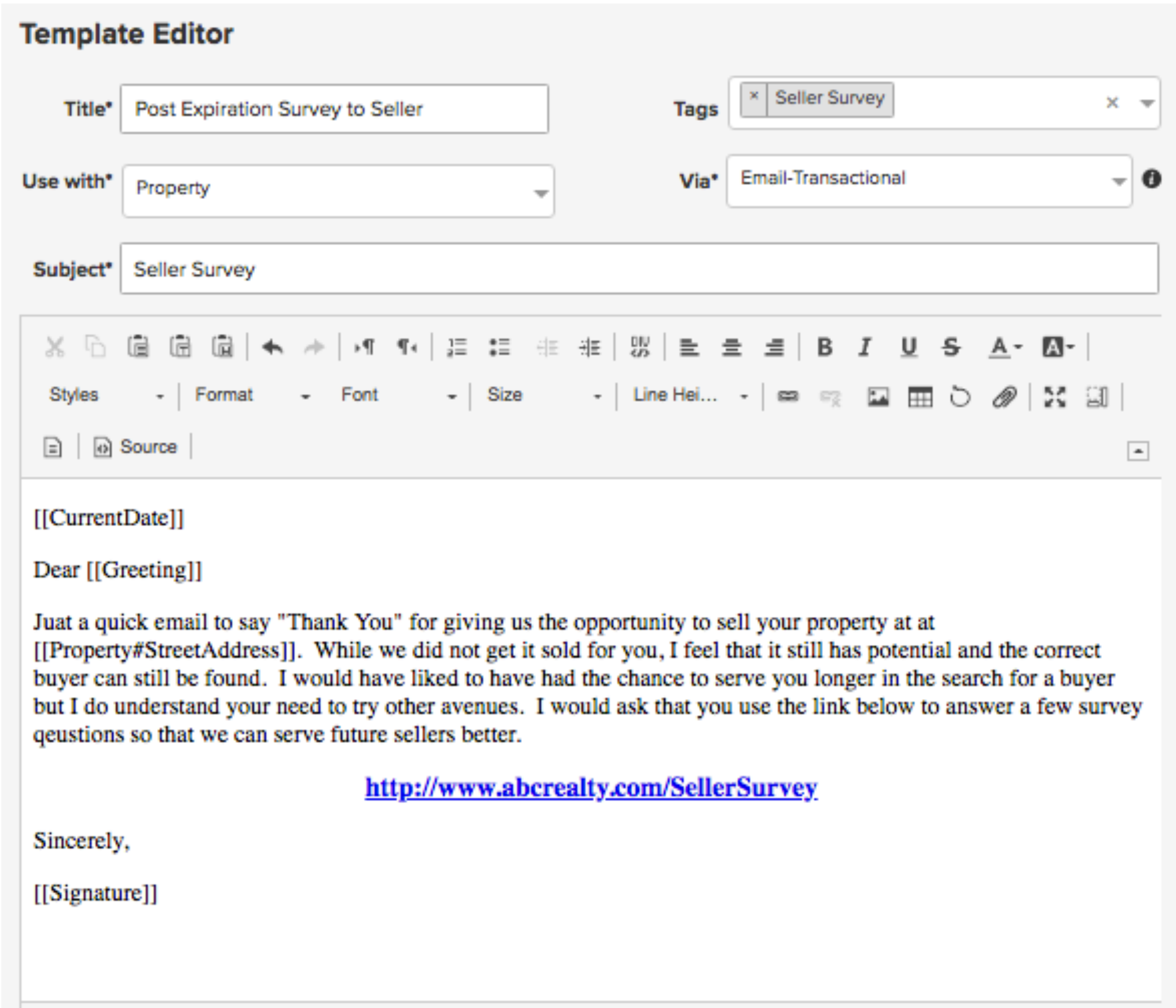
Now that I have designed the email templates I will begin setting up the workflows.

Email for Step 8: Thank You for Re-Listing (Option 1)



This email is used in Step 8 when the seller decides to re-list the property and you want to send a Thank You email.

Email for Step 8: Post Expiration Survey to Seller (Option 2)



This email is used in Step 8 when the seller decides NOT to extend the listing. Using this option gives you the opportunity to send a departing survey request.

Now that all the email templates have been created and saved, I can proceed with creating the workflow itself.

Creating a New Workflow

From the Workflow section of the screen, click on the dark plus sign (**+**) to display the menu for adding new workflows to your list.

Select the "**Create a new workflow**" which creates a blank workflow editor area on the right side of your screen. This is the "Workflow Editor"

The 3 icons to the left of the plus sign are used to filter the viewable list of workflows.

Contact Workflows

Property Workflows

Transaction Workflows

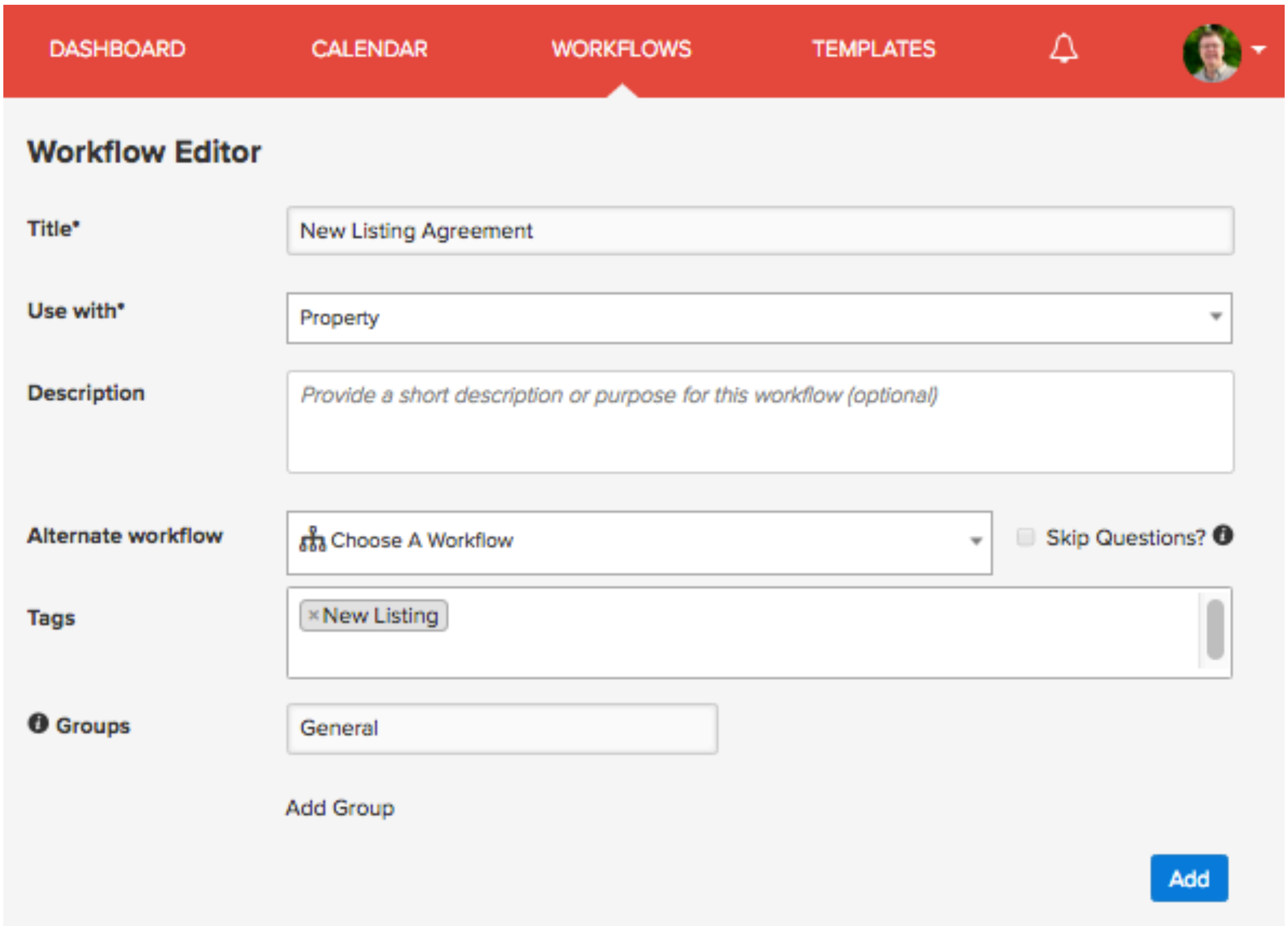
If the icons are DARK then the filter is turned ON limiting the list to the selected filter types.

Note: In the image above the "Import workflows from CSV" is used to import from 3rd party software programs such as Advantage Xi and has a specific format. Unless you have the designated file layout **do not try to import your own CSV files**.

Workflow Editor:

The workflow editor organizes the information about each new workflow that you design and is divided into 2 sections. The upper section describes the basic scope of the workflow itself. The lower section lists the individual activities of the workflow. To better understand how to create your own workflow I will describe in detail each field of the two sections and use the information from the previous section to setup the “New Listing Agreement” .

Upper section:



- **Title** - The title of the workflow should be brief but meaningful. relating to the “Why” I described earlier. For this example I will title the workflow “New Listing Agreement”
- **Use with** - workflows can be used in 3 distinct area; Contacts, Properties (listings), Transactions (closings). Select the appropriate area for your workflow.

- **Description** - Use this field to describe in detail the use of the workflow. This can be helpful for other team members that are new to the system.

- **Alternate workflow** - There are times when you need to stop a workflow prematurely without completing the remaining activities.   When this happens, an Alternate workflow can be pre-selected to take over. This could be helpful if you have a lead generation workflow that sends an email once a week for 10 weeks in order to convert prospects to buyers.   After your 5th Email a contact decides to use your services and becomes a client.   At that point you can go to the 6th activity in his list and delete it. When you delete an activity generated by a workflow the system will ask what you want to delete: "Delete This Activity", "Delete All" or "Delete All Remaining" - if you choose "Delete All Remaining" then it looks to see if there is an Alternate workflow and runs it - which would default to "New Client" workflow stream.   **For now I will leave this field blank.**

- **Skip Questions?** – If this option is checked then the Alternate workflow will automatically start instead of waiting for the user to choose it.

- **Tags** - use searchable tags to help filter your list of workflows. using “key words” like New Listing, Closing, Prospecting, can help narrow your list of viewable workflows.

- **Groups** - Each workflow can have up to 20 Groups to help in the selection process when starting a workflow.   There will always be a “General” group and then up to 19 user defined groups. Each step of the workflow can be assigned to a specific group. The purpose of the group is to allow the user to easily select or unselect groups of activities that may not be needed during the workflow process.

  An example use of “Groups” would be for a closing workflow that includes 4 or 5 steps dealing with financing.   You could make a group called “Financing” and assign the activities that deal with financing to this group.   If you have a Cash Buyer that doesn’t need financing, simply uncheck the “Financing” group when you go to start the workflow on a transaction and the individual steps dealing with financing will be automatically deselected so they do not get assigned to your calendar.

Once you have entered the information above make sure you press the **Add** button to save all the settings in order to allow the lower section to be accessible to add steps.

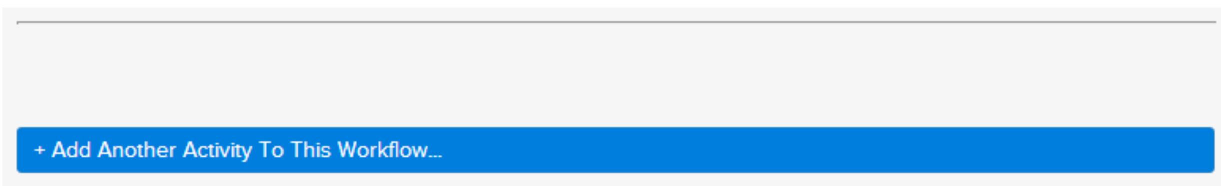
Lower Section:

The lower section is used to list and edit each individual step of the workflow process.

TIP: The system will automatically order the steps based on the selected date field and the calculated offset so you can enter them in any order.

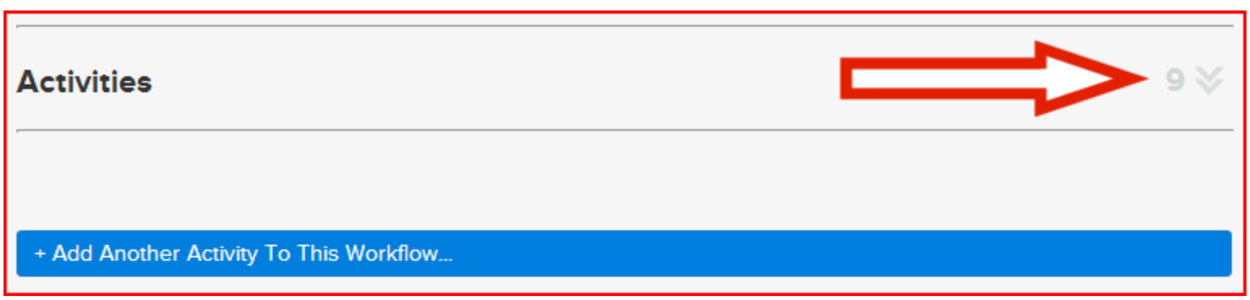
Adding an Activity the first time

After completing the upper section of the workflow, click on the "**Add Another Activity To This Workflow…**" button to display the activity editing screen in the lower section.



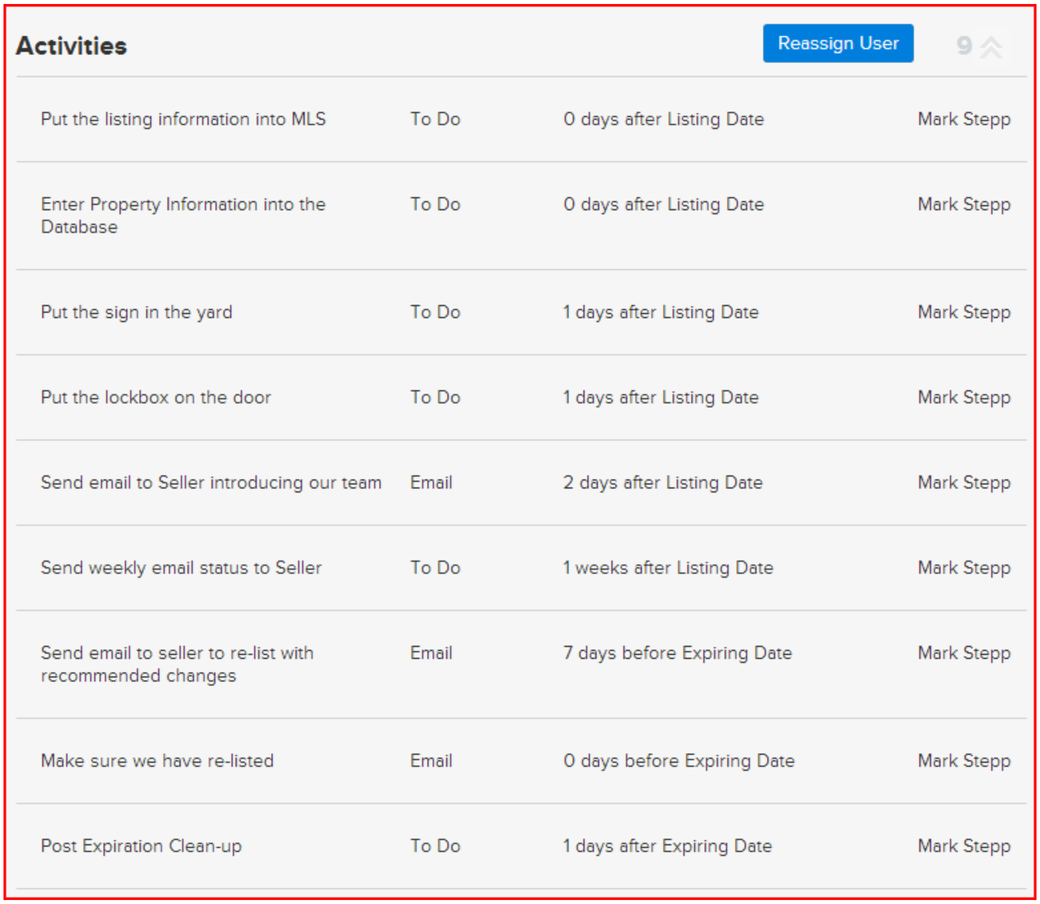
Viewing previously designed activities

When returning to a previously designed workflow, the system hides the activity list until you click on the double down arrow shown below.

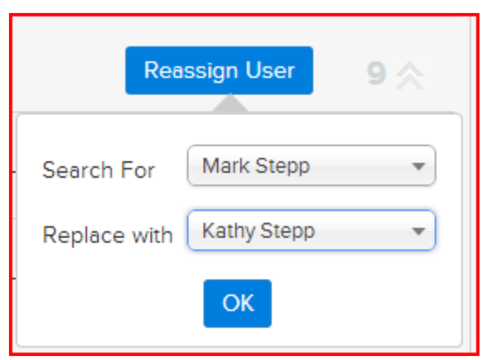


Expanded View of previously designed activities

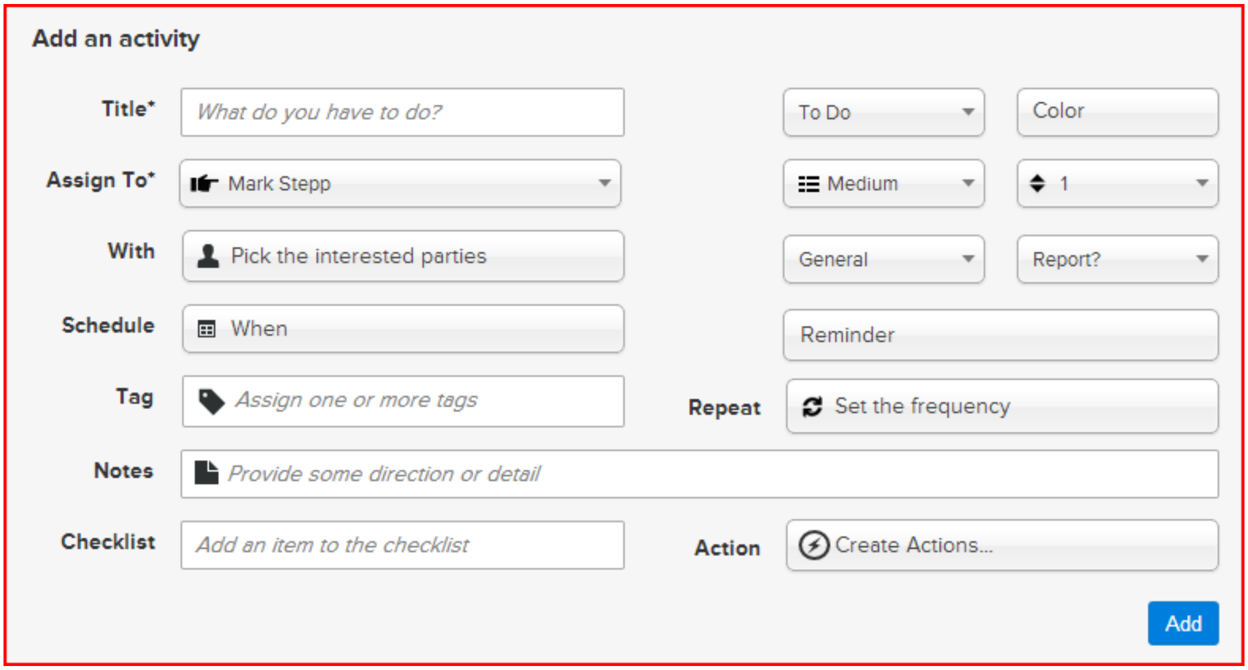
Once the double down arrow is clicked then the view is expanded to show all the workflow activities in a summary view. The double down arrows change to double up arrows which would allow you to hide the list if clicked.



The [**Reassign User**] button allows you to quickly reassign groups of activities from one user to another using search and replace. In the example to the right, all activities assigned to Mark Stepp will be replaced with Kathy Stepp.



Workflow Activity Editor



Each activity of the workflow process will be added / Updated using the fields shown above.

Required Activity Fields

There are currently 4 required fields on this screen which must be filled in to allow the workflow process work correctly.

- Title - the title shows the brief description of the activity to be completed.

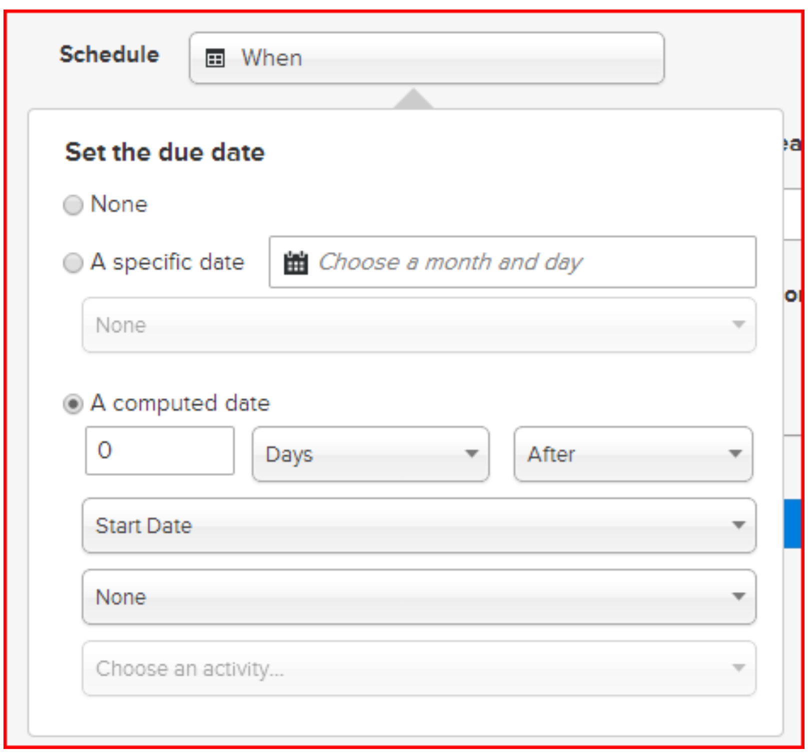
- Type - each activity is assigned to a type to identify its purpose.
    - **Anniversary** – Marriage Anniversary Activity.
    - **Appointment** - Make an appointment with a contact.
    - **Birthday** – Contact Birthday Activity.
    - **BombBomb** – Send an email containing a Bombbomb video
    - **Call** - Make a phone call to a contact.
    - **Email** - Send an email to a contact.
    - **Follow up -** a follow-up meeting with a contact
    - **Lunch -** Away for lunch “out of the office”
    - **Meeting** - A Meeting or Appointment with a contact
    - **Text** - SMS Text message needs to be sent
    - **To do -** A generic task that needs to be completed
    - **Travel** - Away from the office traveling

- Assign To - this identifies which user performs this activity. The "Assign to" field is usually a specific User however there are several "place holders" that can be used to choose the user when you are starting a workflow.

  - Agent
  - Assistant
  - Broker
  - Buyer Agent Assistant
  - Buyer Transaction Coordinator
  - Buyers Agent
  - Closing Coordinator
  - Inside Sales Associate
  - Listing Agent
  - Listing Agent Assistant
  - Listing Coordinator
  - Marketing Assistant
  - Open House Host
  - Record Owner
  - Seller Transaction Coordinator
  - Showing Coordinator
  - Team Leader
  - Transaction Coordinator

  This is useful when you have several agents in your team that uses this workflow – Instead of assigning a specific user to each activity, simply assign the place holder and the correct user can be selected as you start the workflow wizard.

- Schedule - this field allows you to setup the due date calculation method. By default it starts as 0 Days After Start Date. Make sure that the correct information is placed in this popup window in order to properly calculate the activity due date



.

- None - allows the activity to be a task without a date.

- A specific date – will allow you to pick a calendar date without specifying a year. This option is useful if you plan to set up tasks on major holidays.

- A computed date
    - **Count** - quantity of units for the calculation (default = 0)

    - **Count Type** - specifies type of count in units of Days, Weeks, Months or Years (default = Days)

    - **Count Modifier** - Before / After
        - **BEFORE** - meaning **SUBTRACTING** a specific number of days from a specified key date
        - **AFTER** - meaning **ADDING** a specific number of days to a specified key date (default)

    - **Milestone Date** – Date field used to calculate the activity date. Usually a date field located in a contact, property or transaction record of the database such as List Date, Expiration Date, and Contract Date. However there are 2 generic key dates that you can use which do not come from the database. They are simply labeled “Start Date” and “End Date” giving you to generic date indexes to manually enter as needed.

      A special key date called “Completion Date” can be used as a reference to the completed date of another activity in this workflow. When this special key date is used the activity is not given a due date until AFTER the referenced activity is completed. This allows you to postpone assigning a date to an activity until a previous activity is done.

    - **Milestone Time** – Selects how the TIME of the activity is to be assigned.
        - **None** – Do not assign a Time, it will be a TASK.
        - **All Day** – Make this an “All Day” Activity
        - **Start and end** – Assign a Start and End Time
        - ***(Milestone Date)* Time** - Use the “*(Milestone Date)* Time” assigned in the Record. Some *(Milestone Dates)* like “**Photography Date**”, allow for a time to be assigned. In those cases, an option like "**Photography Time**" will be available in the drop down to select. This tells the system to assign the time of the activity to the *(Milestone Date)* time so that When the photography time field in the database is changed then the activity will be CHANGED as well.

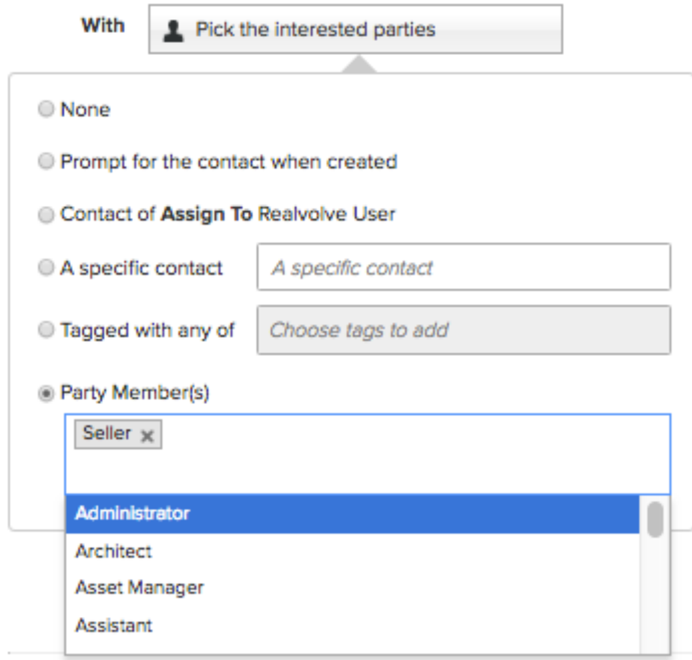
Optional Activity Fields

The remaining fields on this screen are optional but allow you to enhance the features of your workflow needs.

- **Color** - select a color for this activity (default: white) 
- **Priority** - select a priority High, Medium, Low, None
- **Order** - when two or more activities have the same calculated due date, you can assign a specific placement order.
- **Group** - select the user defined group for this activity. (default: General)
- **Report?** - should this activity be included in seller/buyer reports (default: No)
- **Reminders** - specify the type of reminder for this activity. (default: None)
- **Repeat** - specify any recurrence to this activity. (default: None)
- **With** - select the contact(s) for this activity. (see “With” section below)
- **Tag** - enter or select a search tag for this activity.
- **Notes** - enter notes about this activity.
- **Checklist** - allows you to enter a list of checklist items that need to be checked off before the activity can be considered completed. (see “Checklist” section below)
- **Actions** - specifies automated actions for this activity (see “Actions” section below)

With

Select the contact(s) for this activity.



- None - No contact is needed for this activity OR If this is a Contact workflow then it will automatically assign the selected contact when starting the workflow.

- Prompt for the contact when created – this allows you to select a contact when starting the workflow.

- Contact of **Assign To** Realvolve User – this option will assign the linked contact record of the user in the Assign To field.

- A specific contact - pre-select a contact or contacts for the activity. Useful when a specific contact is used in most cases for the particular activity. Value can be changed when starting the workflow.

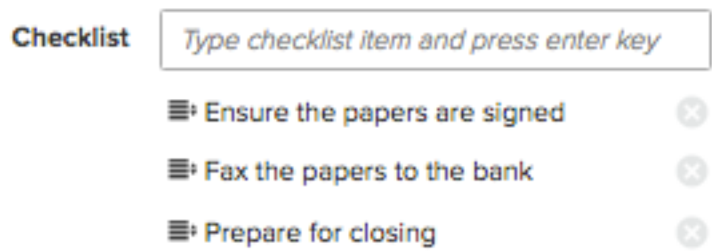
- Tagged with any of – Select a Tag or group of Tags that assigned to contacts in the database. When an action is assigned to the activity it will use any contact currently in the database that has the tag/tags assigned.

- Party Members - pre-select the party member type used for this activity. When a property or transaction is selected for the workflow the party member for the selected type will be assigned to the activity.

  Example: selecting “Seller” will assign the contact from the property that is the seller. Multiple party member types can be specified if you want more than one contact for this activity.

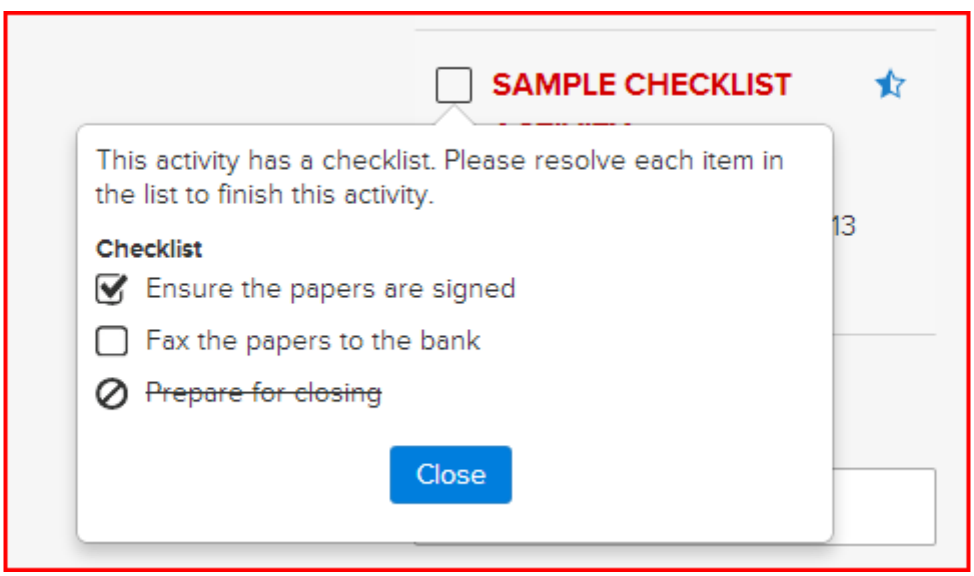
Checklist

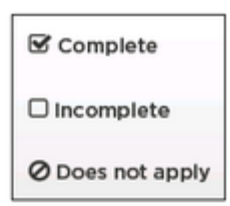
A checklist gives you the ability to define a list of items that MUST BE completed in order for the workflow activity to be marked as done.



When setting up a checklist, you can change the order using drag/drop of the icon to the left of the checklist item.

When the activity comes due, you simply click on the box for each item on the list that was completed to place a checkmark in the box or click a second time to mark the item off the list as not needed. If you marked an item accidentally then click a third time to remove the selected value.



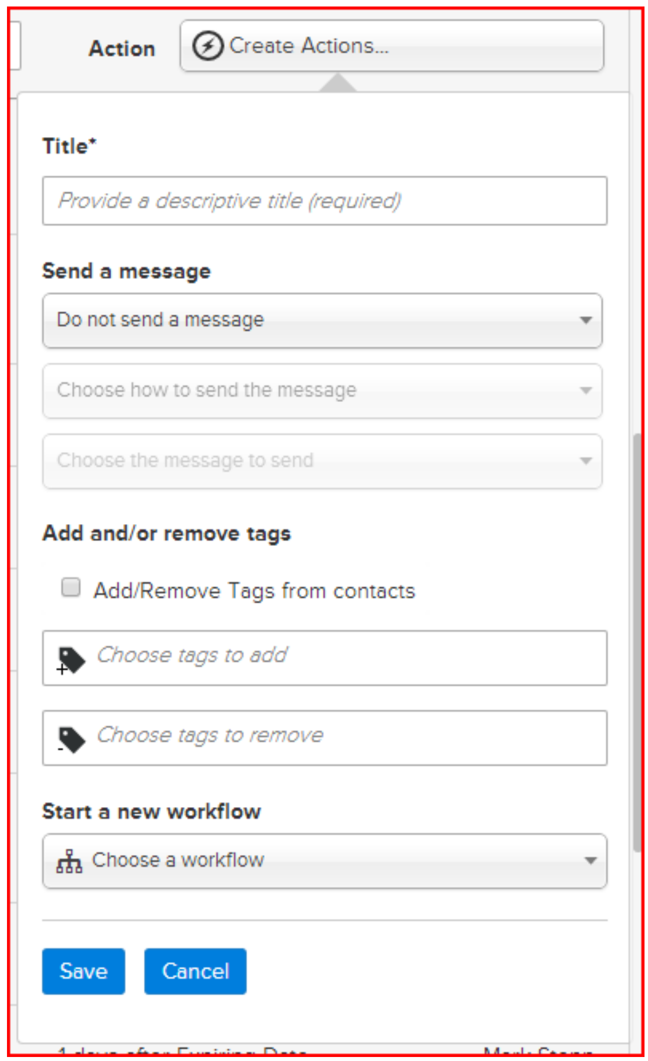


Actions

Actions are used to perform automated processes on activities. In most cases, once an activity has been completed, the system will proceed with the assigned actions. The only exception is when actions are used along with checklists. In that case, actions can be performed when all checklist items have been completed or when there are checklist items still left to do. You can have as many Actions on an activity as necessary and choose which actions to run when the activity is completed.

Each action is given a descriptive title so it can be used in a selection menu (see branching)

Click on the "Create Actions..." button to add an action to the activity. Each action is given a title which is used in a selection menu. If more than one action is added to an activity, the title needs to be descriptive enough to make a correct choice when the menu is displayed.



There are 3 possible automated functions of an Action:

- **Sending a message**
  - Email
  - Facebook
  - SMS Text
  - LinkedIn
  - Tweet
- **Changing Tags**
  - Adding Tags
  - Removing Tags
- **Starting/Stopping other Workflows**

Any combination of the 3 options can be used. In some cases you may only want to send a message and others you may want to send a message and change tags. As long as you have at least one of the 3 actions selected the system will perform the action as required.

Action: Messaging

Setting up standardized message templates are one of the time saving aspects of a workflow. Messages help answer common questions, report on the status of a project, and provide information to common issues. Having the ability to send standardized messages by email, Facebook, SMS Text LinkedIn or Twitter allows you to quickly engage with your customer without consuming large chunks of time writing them.

From the **Send a message** section there are 3 drop down menus:
The first menu allows you to select how you want to process the message being sent:

1. **Do Not Send A Message** – means no message will be sent on this action
2. **Send Manually (With Preview)** – will display a menu to allow you to see a preview of the message and make changes before it is sent.
3. **Send Manually (Without Preview)** – will send the message when you specify to run the action but does not give the option to preview before it is sent.
4. **Send Automatically** – this will send the message automatically based on the date/time of the activity if both are specified or if just the date is specified then it will be sent at the specified time in the **SETTINGS > EMAILS** option screen.
5. **Send Immediately** – this will send the message when the activity is created and automatically mark the activity as complete. This is useful when you want an email to be sent as soon as the workflow is started.

The second menu allows you to pick the method of delivery

1. Email
2. Facebook
3. LinkedIn
4. SMS
5. Twitter

The third menu allows you to choose the correct message template to send.

Action: Tag

Tags are an important part of filtering data. Proper usage of Tags can significantly reduce the time it takes to find information in your database. Properties can be tagged with keywords like "**Active Listing**", "**Expiring Soon**", "**Under Contract**" or any other combination that would allow you to quickly filter your data.

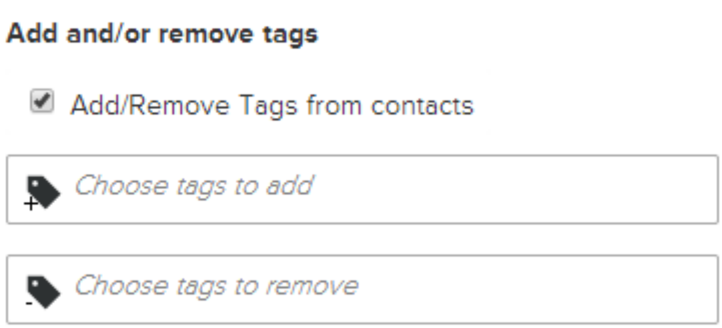
The Action Tags are used to automatically assign or remove tags from a database record. As your workflow progresses through its normal steps, the ability to indicate the key milestone location helps get a perspective on the current state of your system. If you are using a lead generation workflow, the "**New Lead**" tag can be assigned to a contact that just got put into the system. Once the lead becomes a customer the workflow can automatically change the tags from "New Lead" to "**New Customer**" so you don't have to think about it.

To Add tags, type the tag name(s) in the ADD TAGS field or remove tags under the REMOVE TAGS field.

When removing tags, if the database record does not have a specific tag then no action is taken, so it does not hurt to have additional items listed.

Where do tags get added/removed:

- If the Workflow "**Use With**" is **Contact** then tag changes are applied to the contact(s) assigned in the "With" field.
- If the Workflow "**Use With**" is **Property** and there are no contacts in the "**With**" field then tag changes are applied to the Property assigned in the "**About**" field.
- If the Workflow "**Use With**" is **Transaction** and there are no contacts in the "**With**" field then tag changes are applied to the Transaction assigned in the "**About**" field.
- If the Workflow "**Use With**" is either **Property** or **Transaction** and the "**With**" field does have at least one contact assigned then tag changes are applied to the **Property** or **Transaction** by default UNLESS the "**Add/Remove Tags from Contacts**" is selected. This option forces tag changes to be applied to the contact(s) assigned in the "**With**" field.

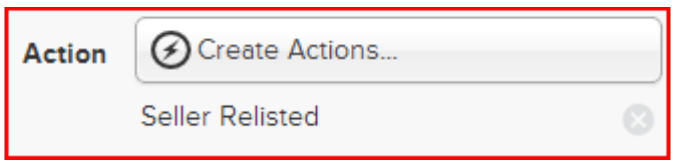


Action: Workflow

The ability to start a new workflow from an existing workflow is an important part of organizing youself to be more efficient.   You may want to start another workflow once the current workflow is completed. Another possibility is that your workflow process can not proceed in a single linear path and may need to branch a different direction based on the outcome of a given question or workflow step. In either case, by selecting the next workflow process, you can start that process automatically based on the needs of the current activity. Starting the workflow in this method take you through the same workflow wizard that was used when starting the original workflow however, some of the required fields will be automatically filled in using the originating workflow.

Saved Actions

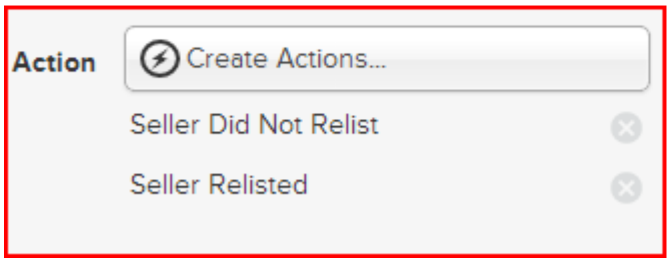
Once the actions have been saved to the workflow process, the system will display the title of the action below the “Create Actions…” button.



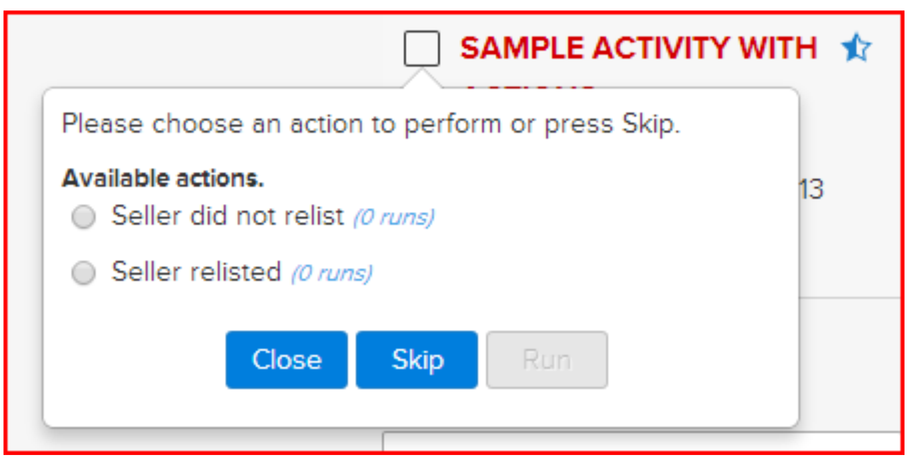
To remove the action, simply click on the delete button to the right of the action title. Clicking on the action title will display the action editor to make changes as needed.

Branching:

You can create more than one action group. This gives you the ability to branch a different direction based on the outcome of the workflow activity. An example of a branch would be an activity that asks if the seller relisted the property on the expiration date. One action would be "**Seller Relisted**" and sends a "Thank you for re-listing" email and removes the tag "Expiring Soon" and starts a new Workflow called "Extended Listing Agreement". The other action or branch is "**Seller Did Not Relist**" which sends a "Post Expiration Survey" email to the seller, removes the "Active Listing" tag, adds the tags "Withdrawn" and "Expired" and then starts a new workflow called "Post Expiration Clean-up".

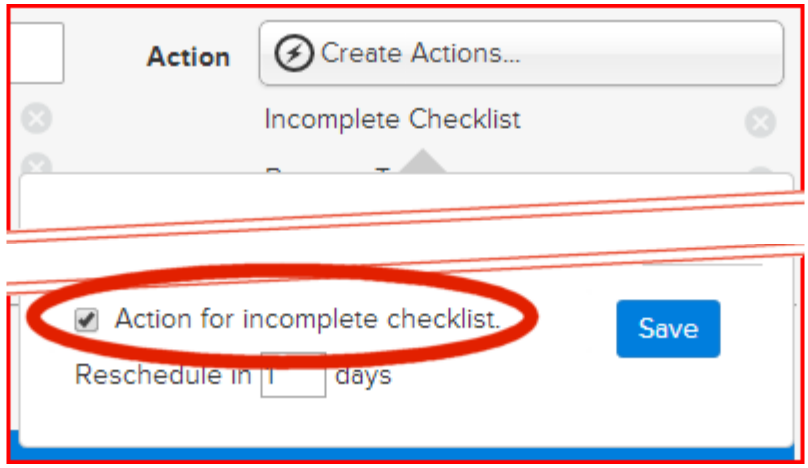


When the day the activity comes due, click on the box to complete it, the system will display a menu to allow you to choose one of the actions to process. Based on the true outcome of the activity you can decide which option to choose and run.



Each available action will also show the number of times that action has been run for this activity.

Branching with Checklists:



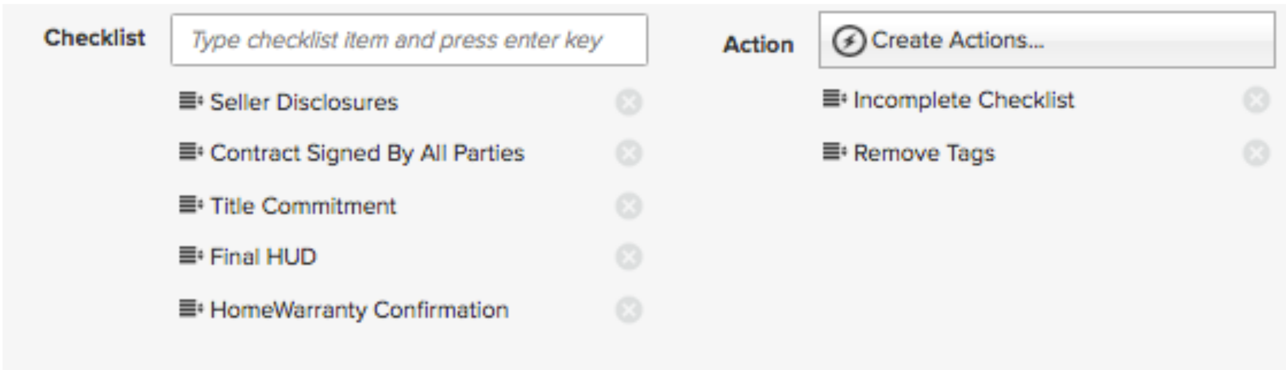
As I stated earlier, in most cases, the system will process actions once the activity is completed. The only exception is when activities contain checklists, in that case, actions can be performed when checklists are completed as well as when they are incomplete.

At the bottom of the action popup editor is a checkbox which allows you to indicate if an action item can be used when an incomplete checklist exists… If this option is "checked" then the action would be available ONLY when the checklist has at least one incomplete item.

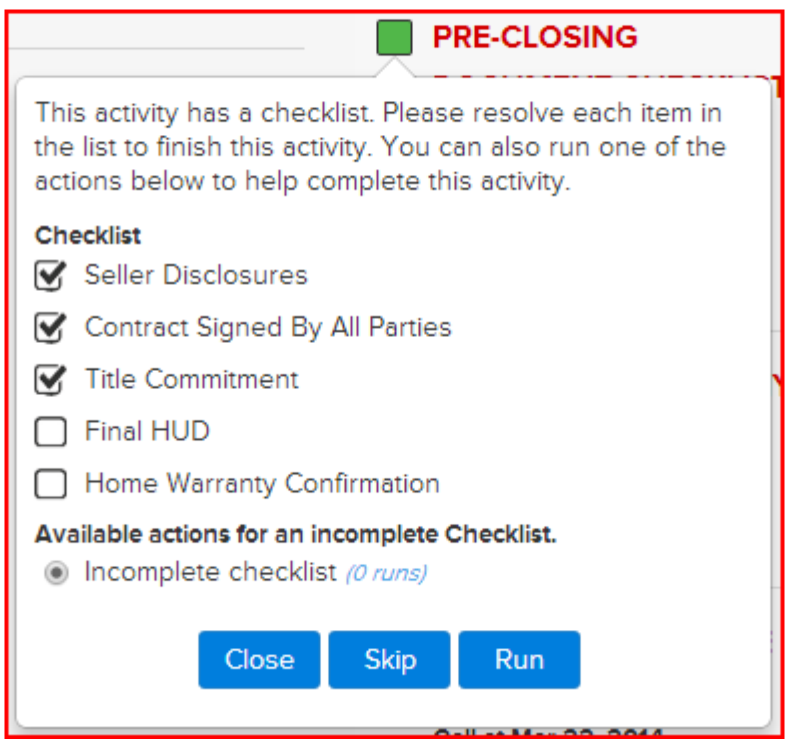
TIP: A good example of how this would be used is when you have a checklist of 8 to 10 items that represent documents needed for closing. If you have 8 of the 10 documents you could run an action to send an email to your buyer or seller stating that you still needed the 2 unchecked items in the activity. By using the Incomplete checklist merge field [[Activity:Checklist#Incomplete]] in the body of your email the system would list the 2 Incomplete checklist items in when sent.

Once the email was sent you might want it to remind you in a few days to see if the 2 documents have come in – using the **Reschedule in X days** to change the date on the activity would be changed as specified. Placing a 5 in the number of days would cause the activity to be rescheduled for 5 days from the current date.

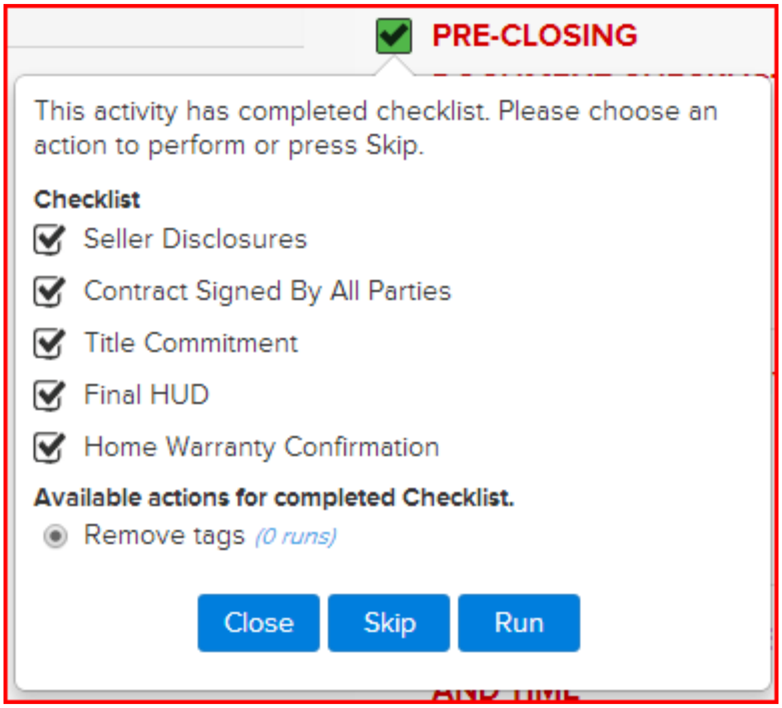
The difference is that as an activity is marked as complete; it's allowed to process the actions - in the case of an incomplete checklist the activity will not be marked as complete BUT you may still want to perform some kind of action on the incompleteness of the action.



An example of this is when you have a Pre-Closing activity with a checklist of items to bring to the closing. Of the 5 items to bring to closing if you only have 3 - the remaining 2 items are important and will prevent the closing from happening.   Using an "Incomplete" action allows you to send an email to the necessary party member asking for the remaining 2 items needed on the checklist.



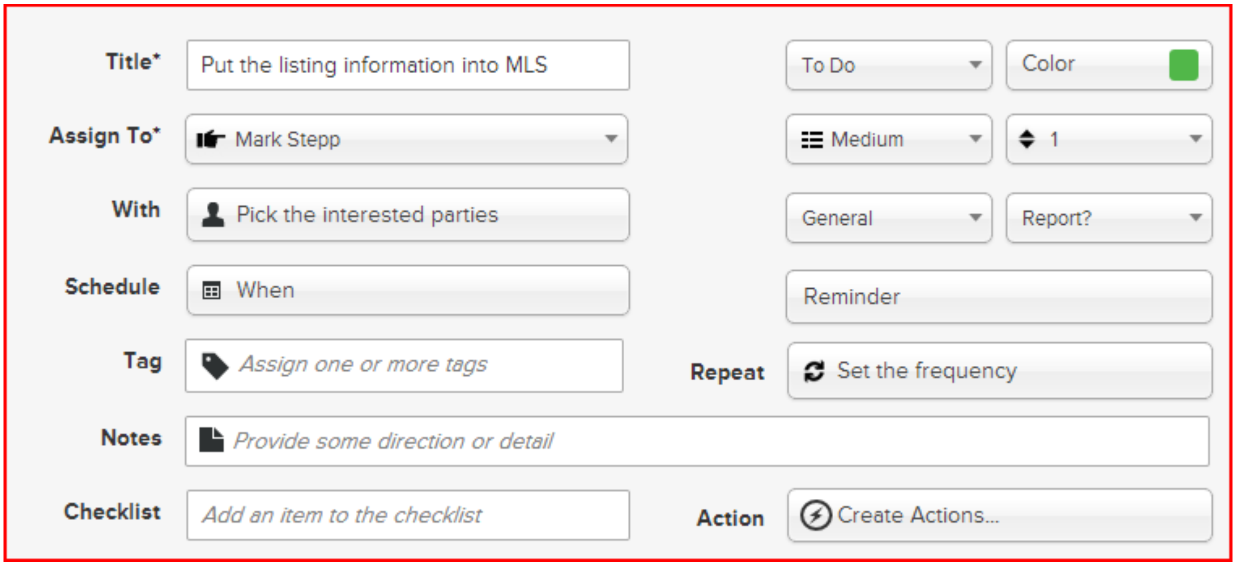
Once all of the checklist items have been completed then the “Incomplete” action goes away and the Actions for a “Completed” checklist will display. You then have the option to select that action or other actions that may be present and Run the action as required.

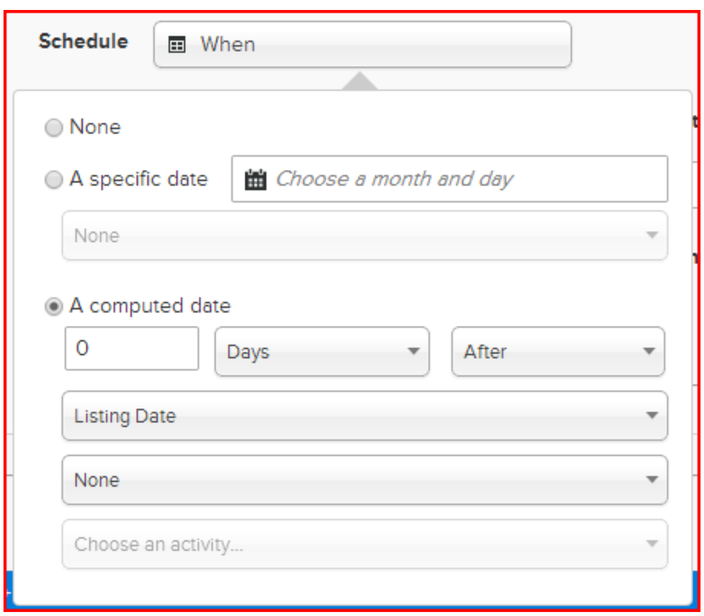


Entering the Activities of the Basic Workflow Example

In order to better explain the data entry process for activities, I will show each step of the basic workflow example as it would be entered into the system.

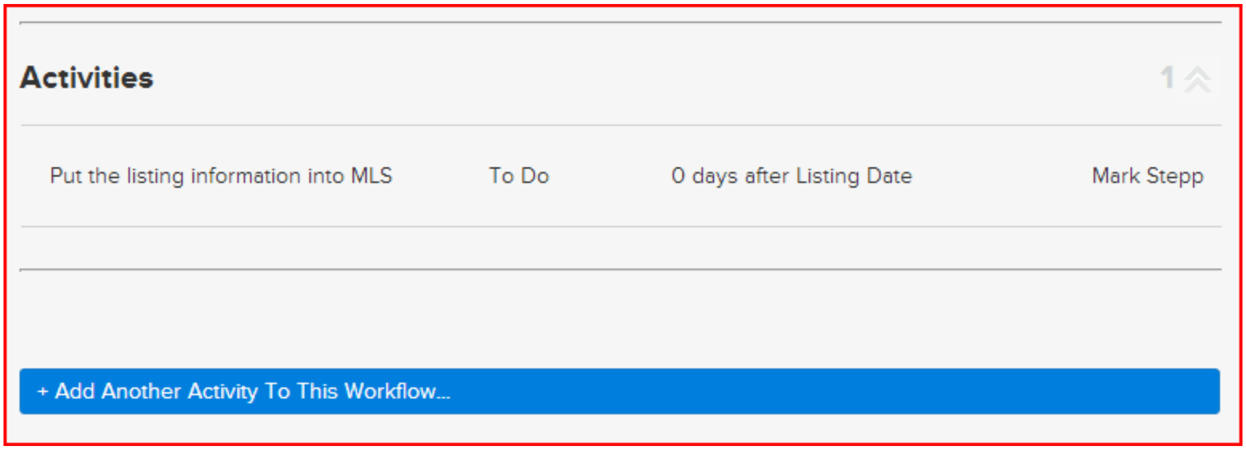
Activity 1: 0 Day(s) After Listing Date - Put the listing information into MLS





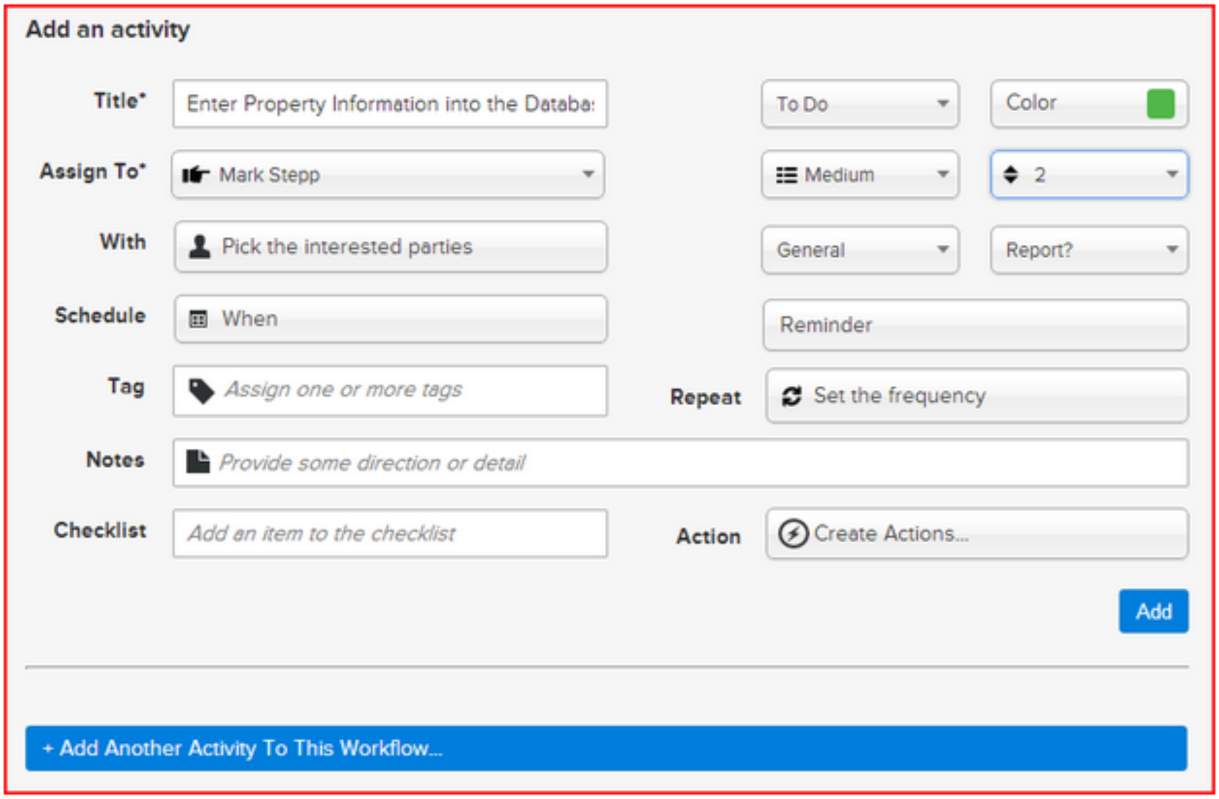
Activities 1 - 6 uses the “Listing Date” as the milestone field in its calculations. In this case I am using 0 Days AFTER the listing date which calculates means it happens on the listing date.

After entering the Activity information and pressing the Add button, the system will display the activity summary and a button to add additional activities.

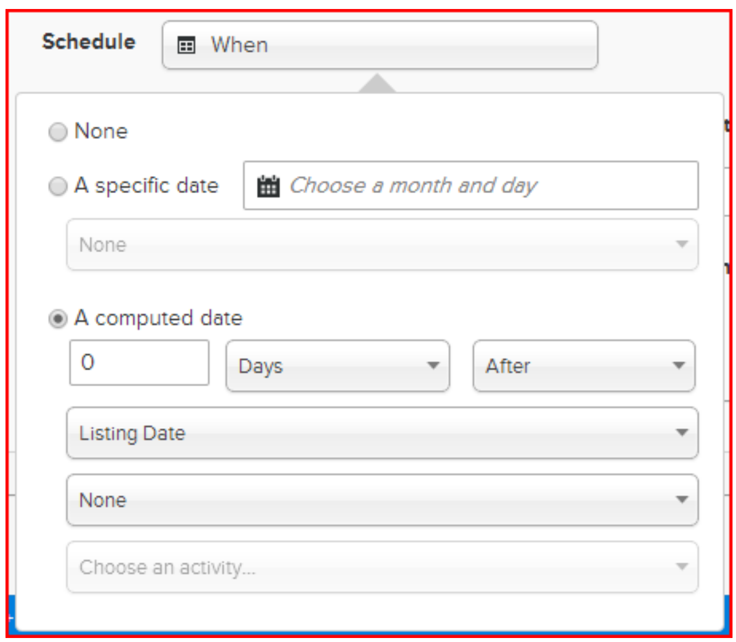


click on the “Add Another Activity To This Workflow…” to continue with the workflow setup process.

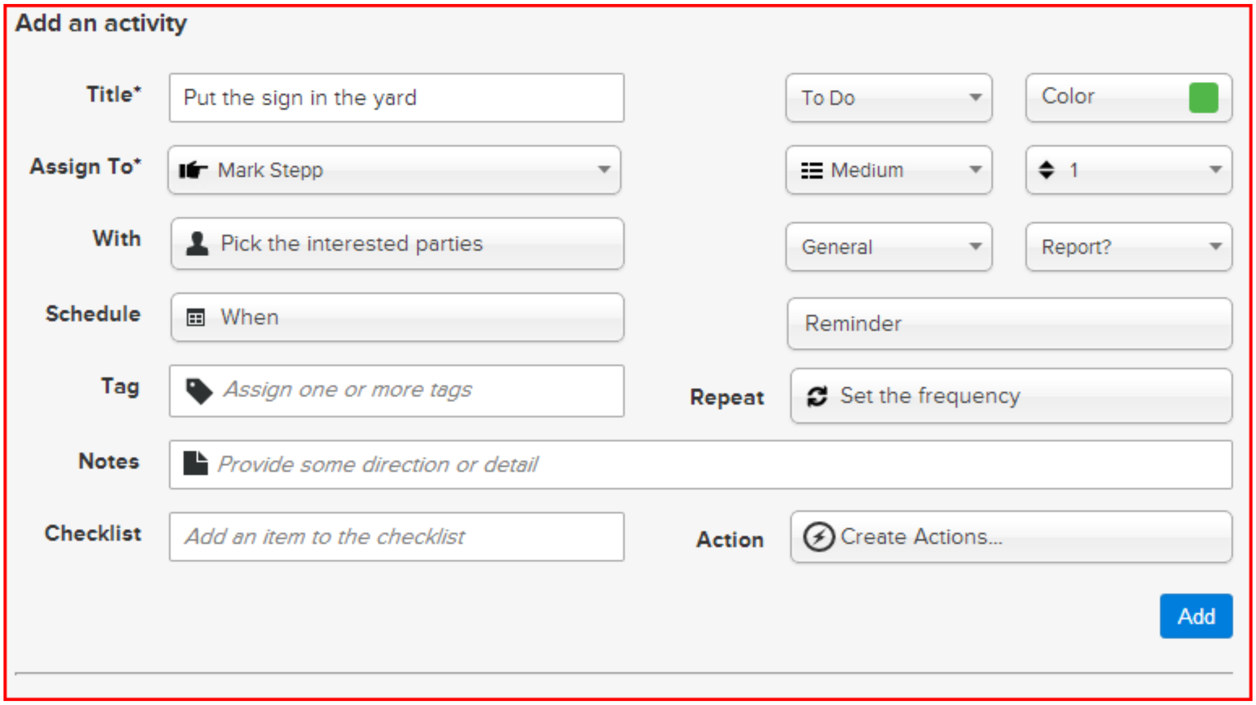
Activity 2: 0 Day(s) After Listing Date - Enter Property Information into the Database



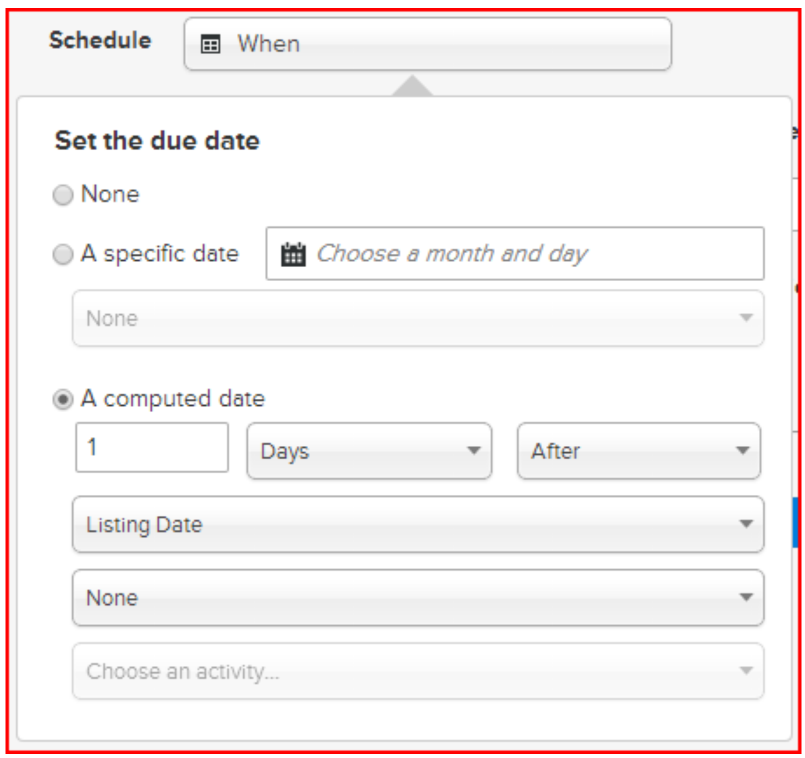
Since Activity 1 and 2 are both calculated at 0 days after Listing Date. In order to have this activity come second in the list, I have specified the number ”2” in the ORDER field in the upper right.



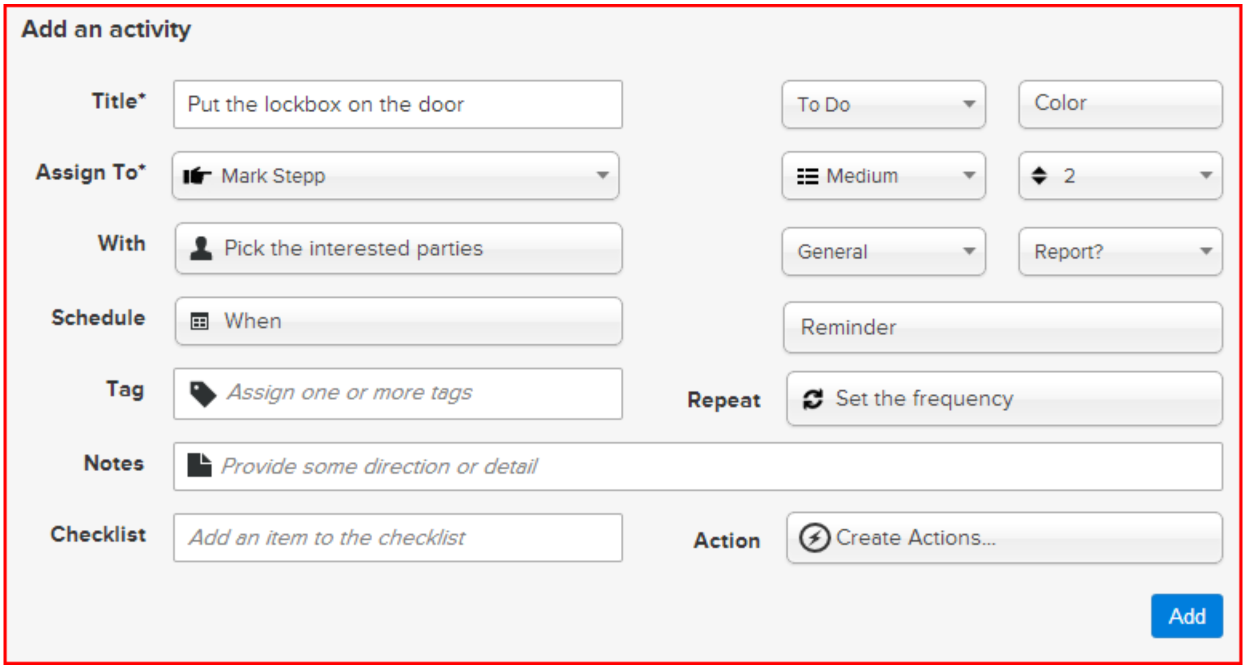
Activity 3: 1 Day(s) After Listing Date - Put the sign in the yard



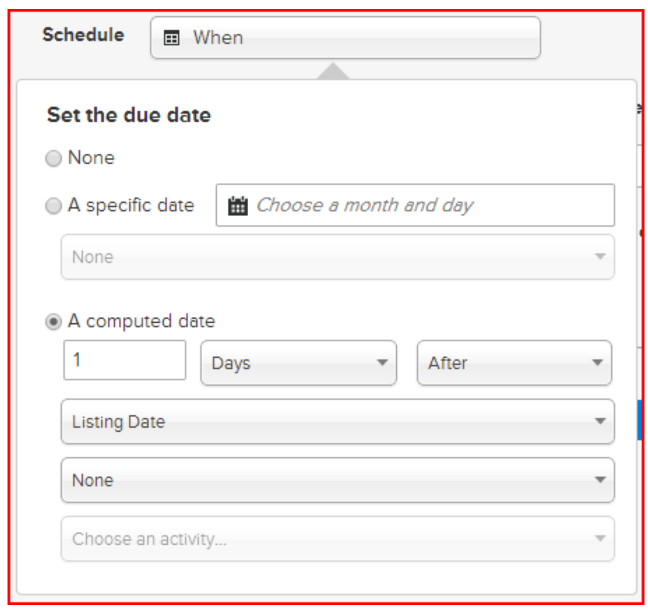
In this activity I am computing the due date as 1 Day After the listing date. If the Listing date is July 1st 2015 then this activity would have a calculated date of July 2nd 2015.



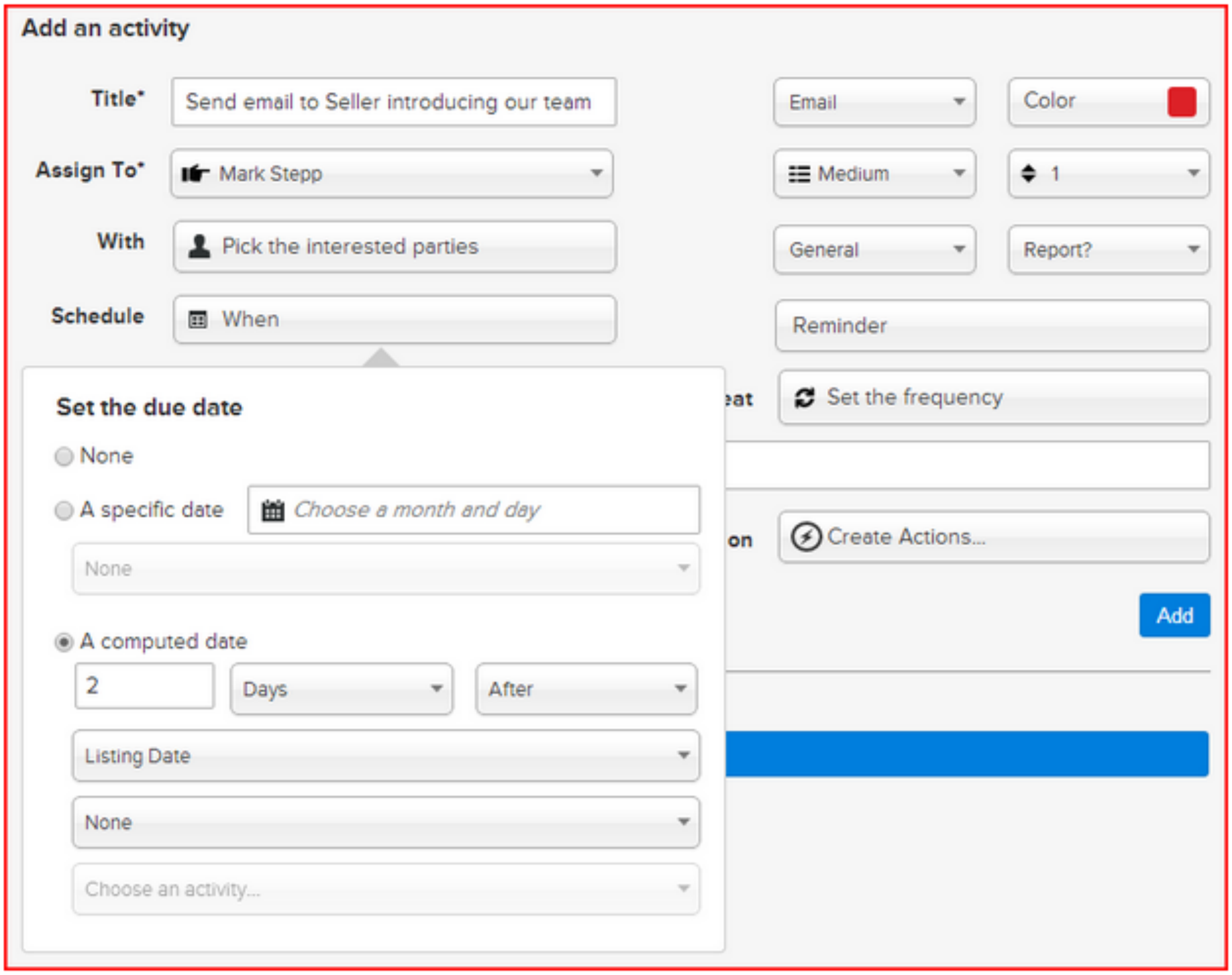
Activity 4: 1 Day(s) After Listing Date - Put the lockbox on the door



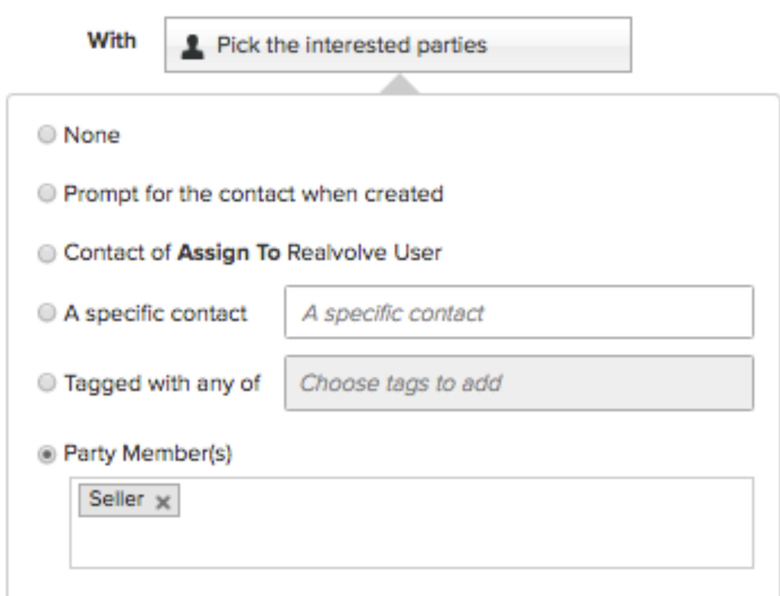
Since Activity 3 and 4 are both calculated at 1 days after List Date, in order to have this activity come second in the list I have specified the number ”2” in the ORDER field in the upper right.



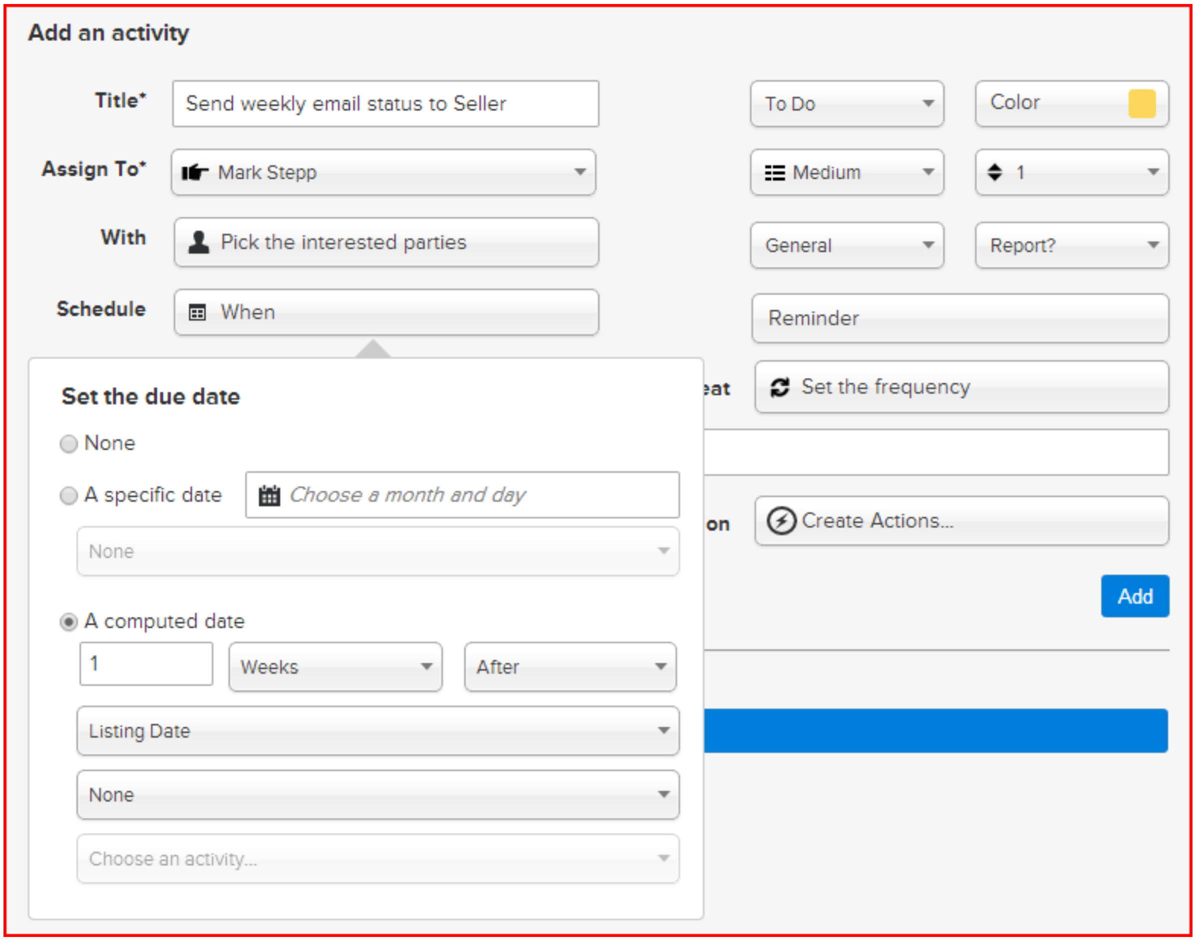
Activity 5: 2 Day(s) After Listing Date - Send email to Seller introducing our team



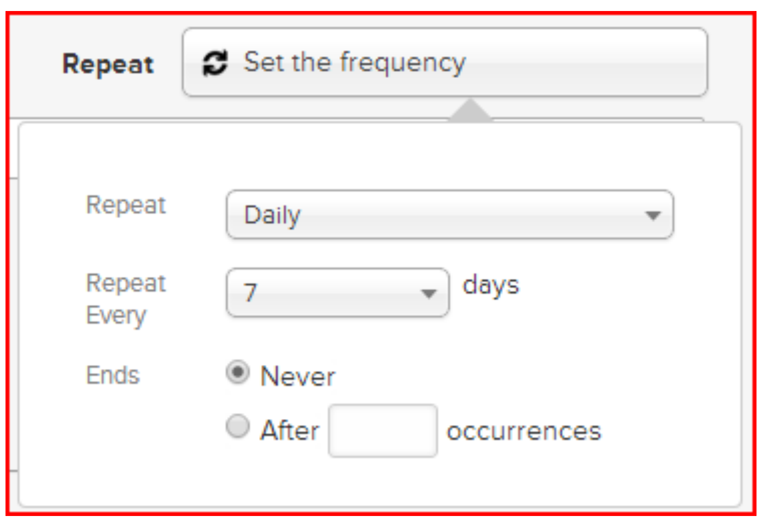
When sending emails, the system must know WHO to send the email to. To do that you must specify the "With" field. In this example I have chosen the Party member "Seller". When the seller is selected in the people tab or during the workflow wizard startup process the selected contact will receive the email.



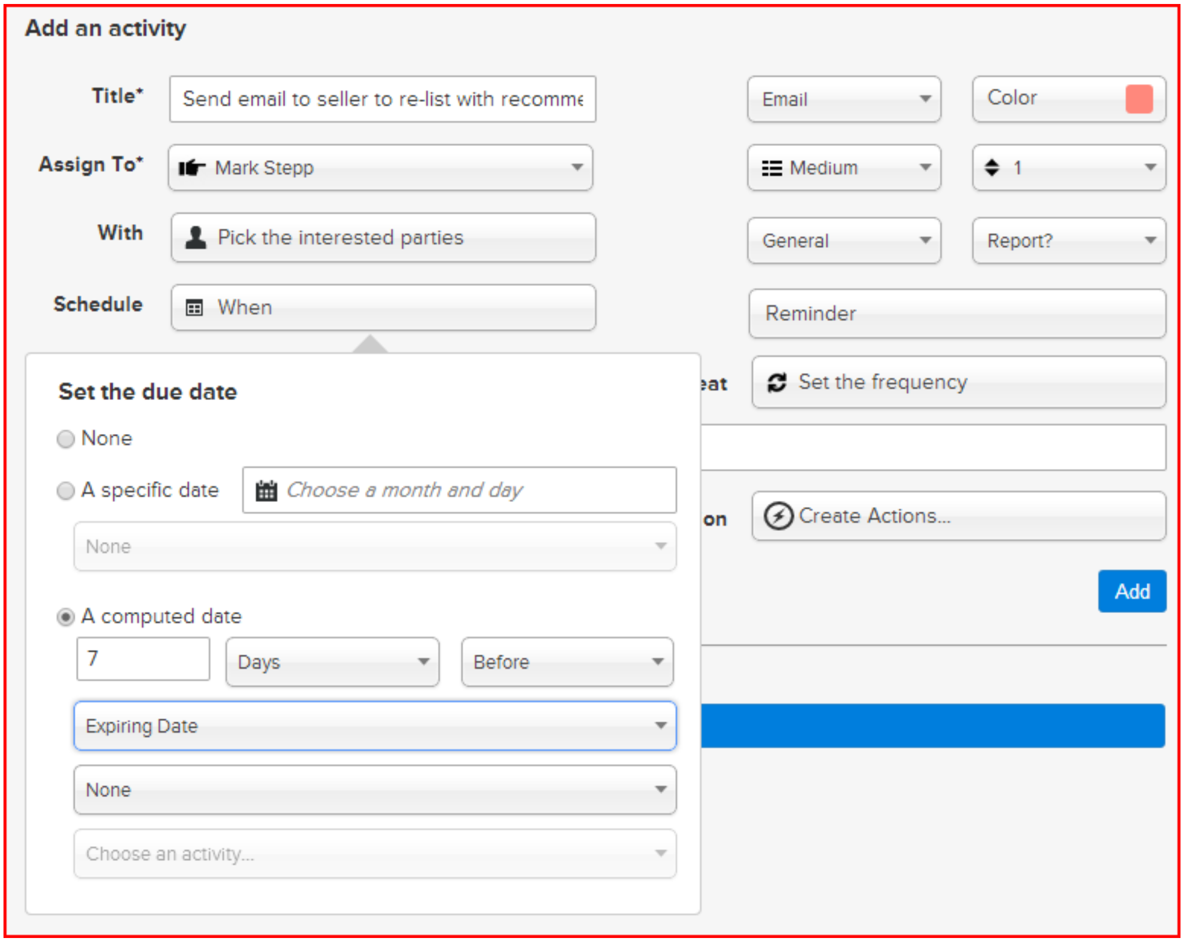
Activity 6: 1 Week(s) After List Date - Send weekly email status to Seller

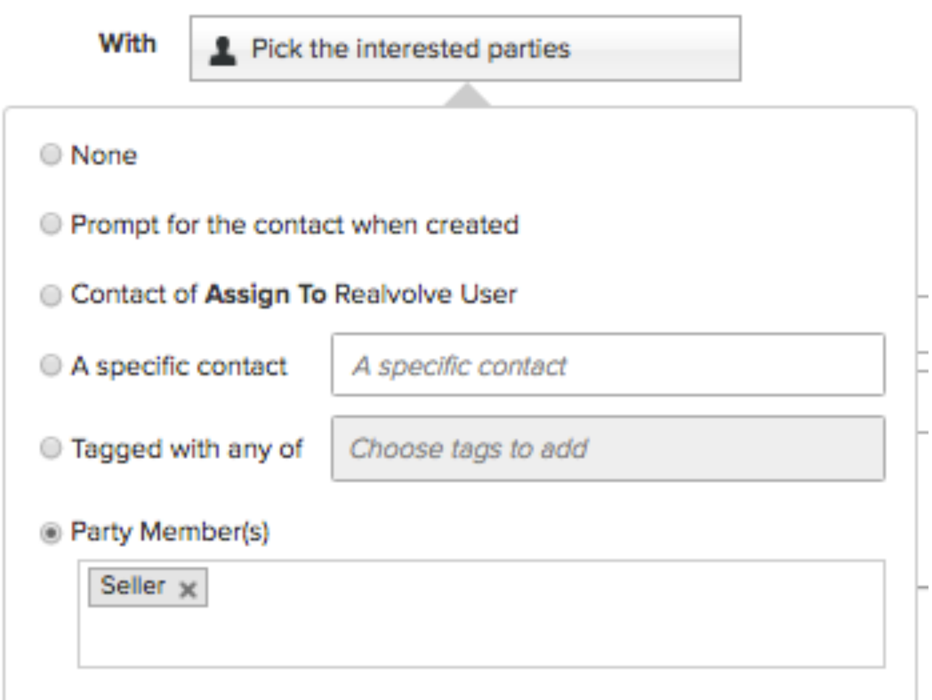


Be sure the select the seller in “With” field as I did in the previous activity and also set the **Repeat Frequency** to every 7 days since I want to send the status email every week.



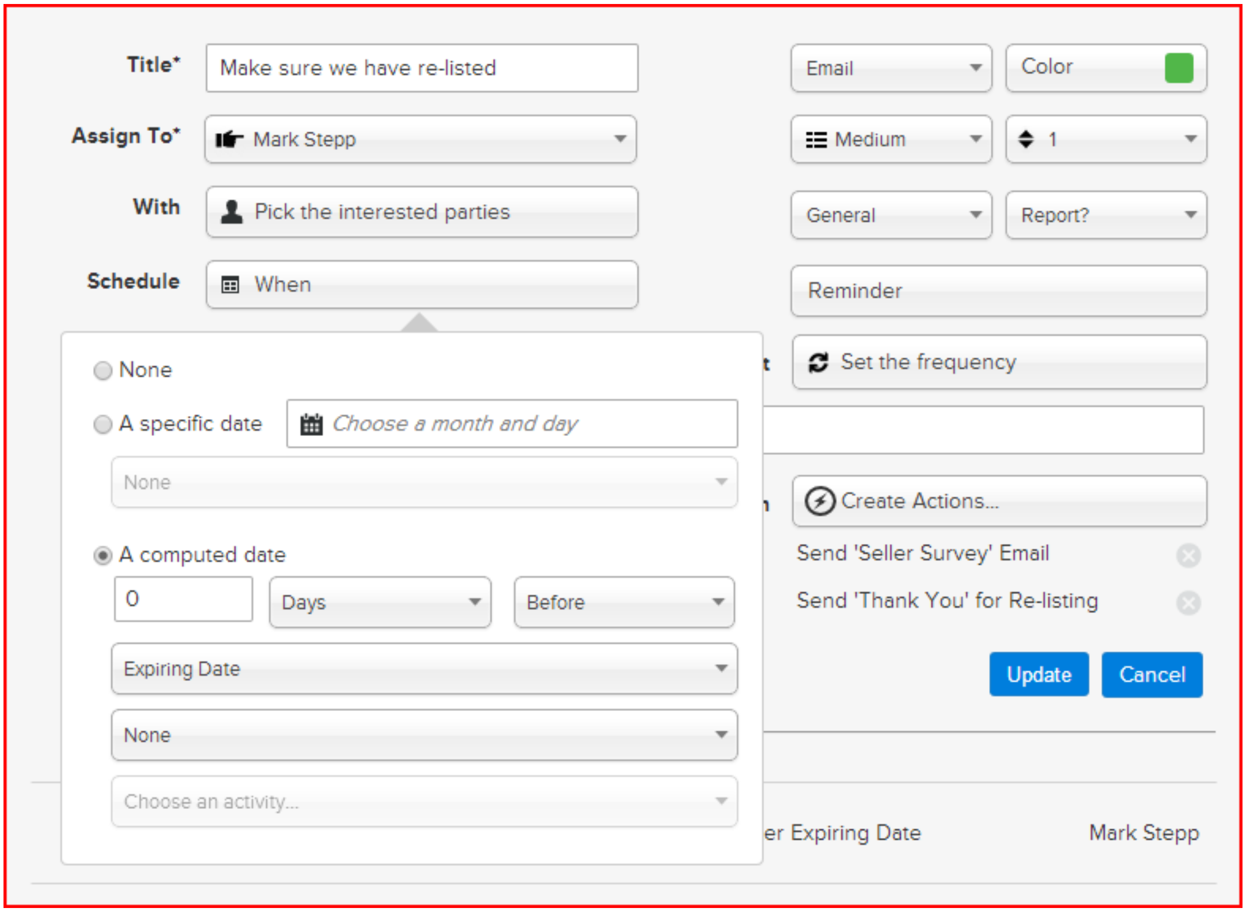
Activity 7: 7 Day(s) Before Expiration Date - Send email to seller to re-list with recommended changes



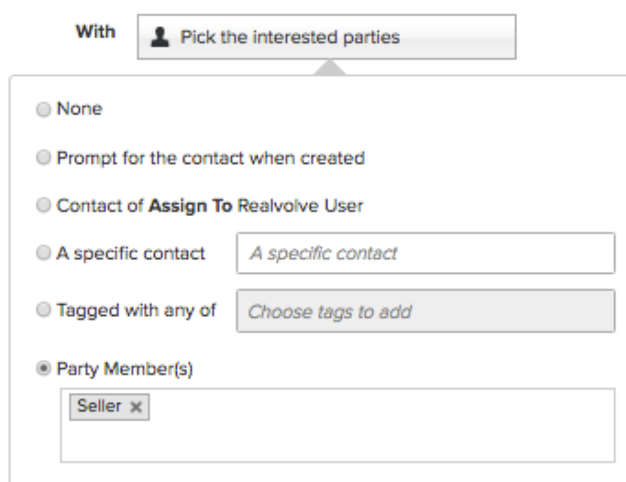


Once again, select the **Seller** in the "With" field

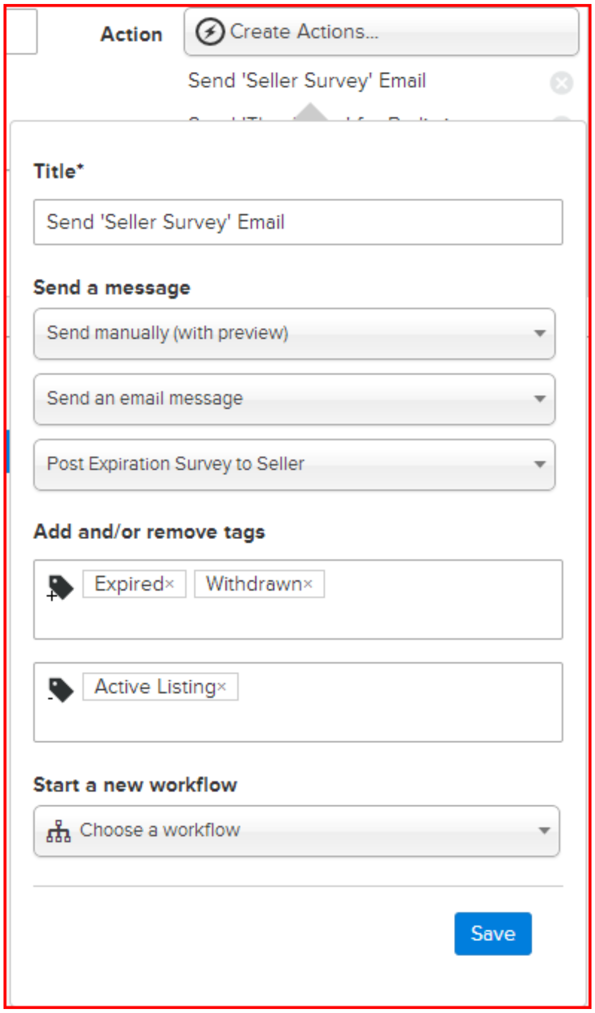
Activity 8: 0 Day(s) Before Expiration Date - Make sure we have re-listed



Since both actions in this activity sends emails I must again specify the "With" field as Seller.



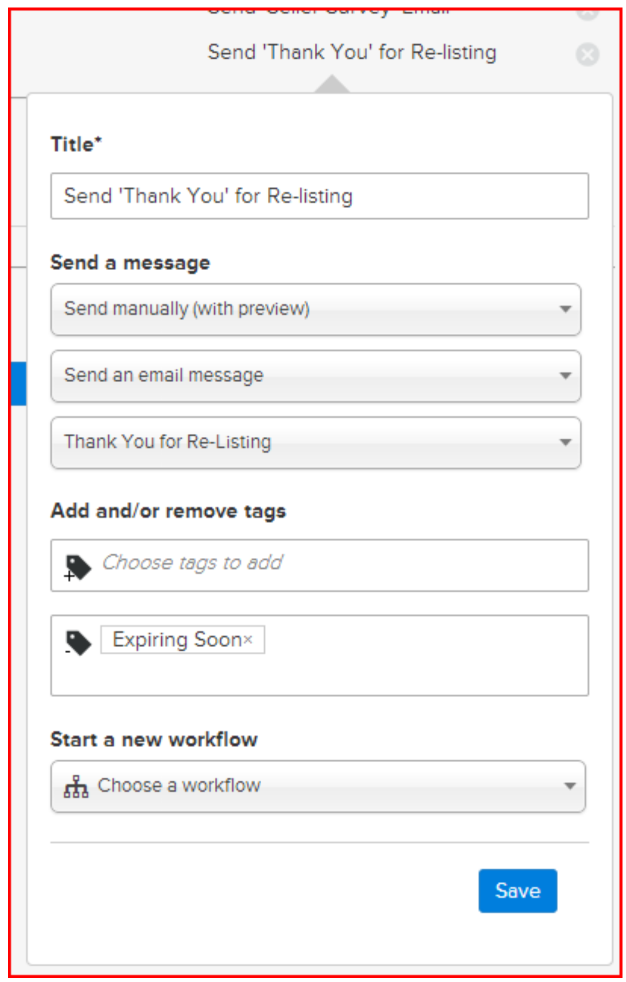
This activity has 2 Actions:



When entering the action, be sure to give them unique titles so they can be distinguished in the action menu. For the first action **Send 'Seller Survey' Email** , I am specifying that we are sending an email message and selecting the correct Template of **Post Expiration Survey to Seller**.

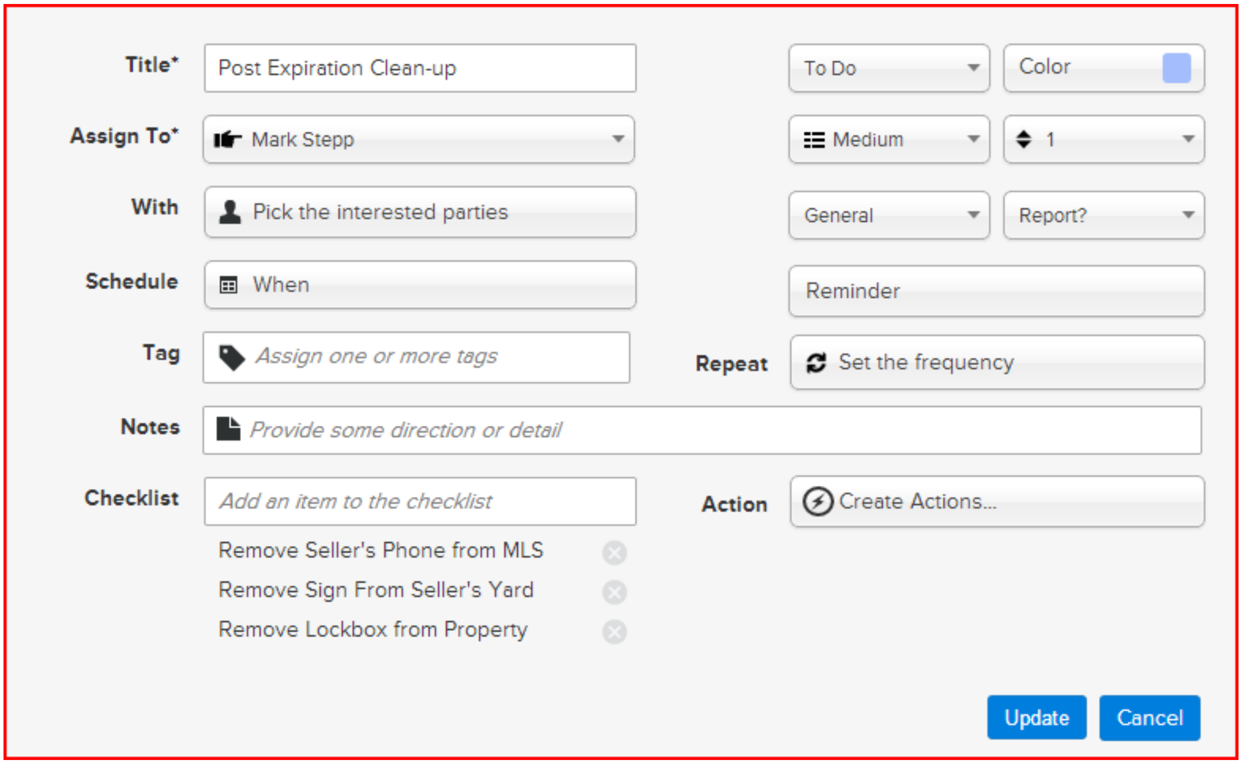
I am adding 2 TAGS to the property "Expired" and "Withdrawn" so that you can organize the properties later.

I have also chosen to remove the TAG of "Active Listing" from the property.



The second action titled "Send 'Thank You' for Re-listing" sends the email template of "Thank You for Re-Listing" and also removes the TAG of "Expiring Soon".

Activity 9: 1 Day(s) After Expiration Date - Post Expiration Clean-up



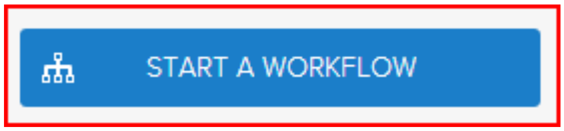
This activity simply shows how you can setup the checklist items that are required to complete before the activity itself is considered complete.

Remember to setup the **When** as *1 Day After Expiration Date*.

Starting a Workflow

Once you have set up the workflow processes, they will remain in your system in order to use them as needed for Contacts, Properties and Transaction.

Where to start a workflow:



Currently there are 4 places that you can start a workflow: The Dashboard or on the Radar tab of a Contact, Property or Transaction.

Typical Examples:

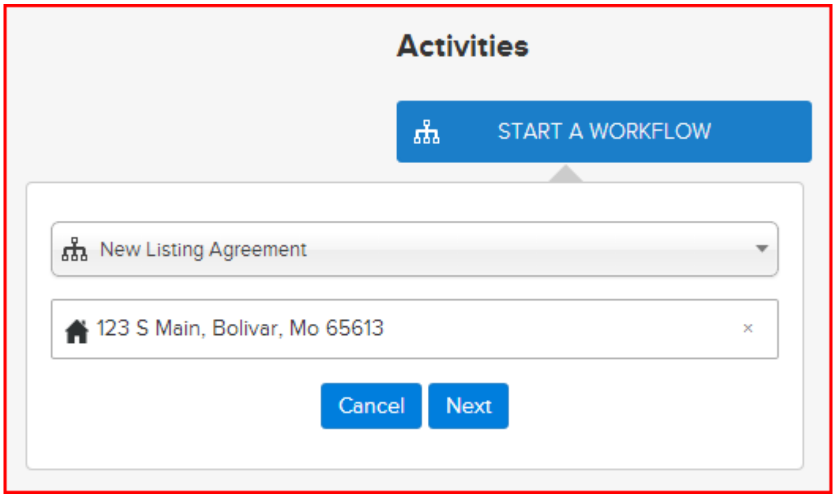
- After entering a new lead into the database you could go to the Radar tab of the contact and start a “New Lead” workflow.
- After adding a new Property, click on the radar tab and start a “New Listing” workflow.
- Once a transaction is created, click on the radar tab and start the “Buyer side Closing” workflow.

What is the workflow wizard?

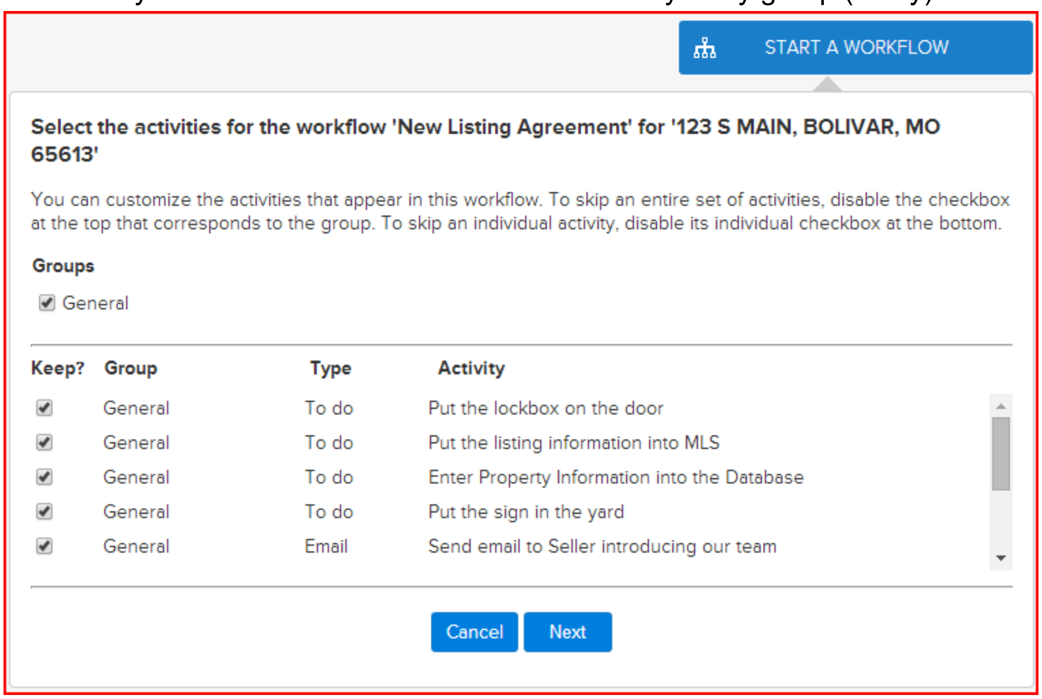
When you click on the “Start a Workflow”, the workflow wizard takes you through a series of screens which help you fill in the required information to begin the workflow. Depending on the requirements of each workflow the information shown in the wizard will be different.

Workflow Wizard Steps:

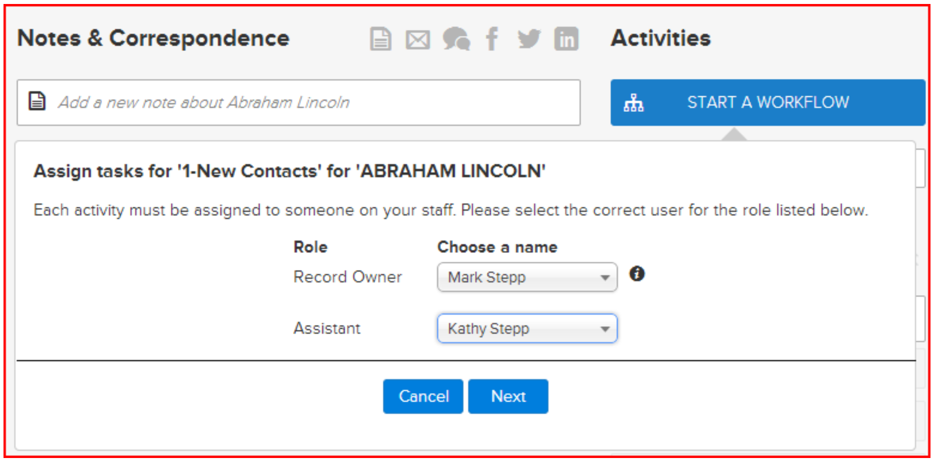
1. Click on **Start a Workflow**
2. Select a Workflow to Start (example: **New Listing Agreement**)
3. Select a Contact, Property or Transaction (example: **123 S Main, Bolivar, Mo 65613**)



4. Deselect any unwanted workflow activities individually or by group (if any)



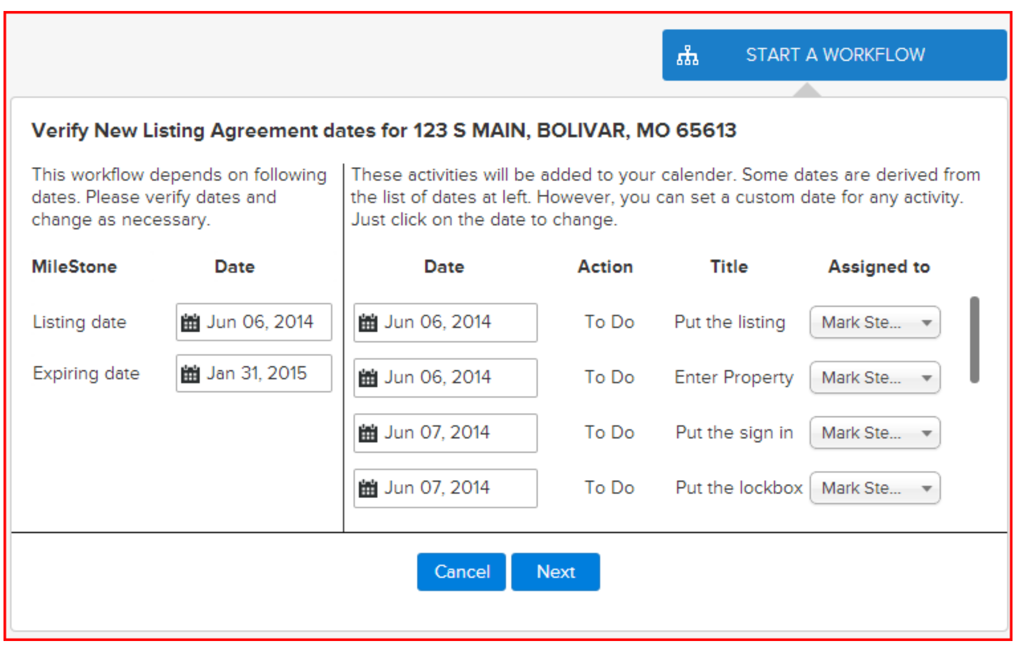
5. If Activities in the workflow use any of the 4 “assign to” place holders (Listing Agent, Buyers Agent, Assistant, Record Owner), an additional popup screen to select the “Assign To” fields which use those placeholders will display… (sample below)



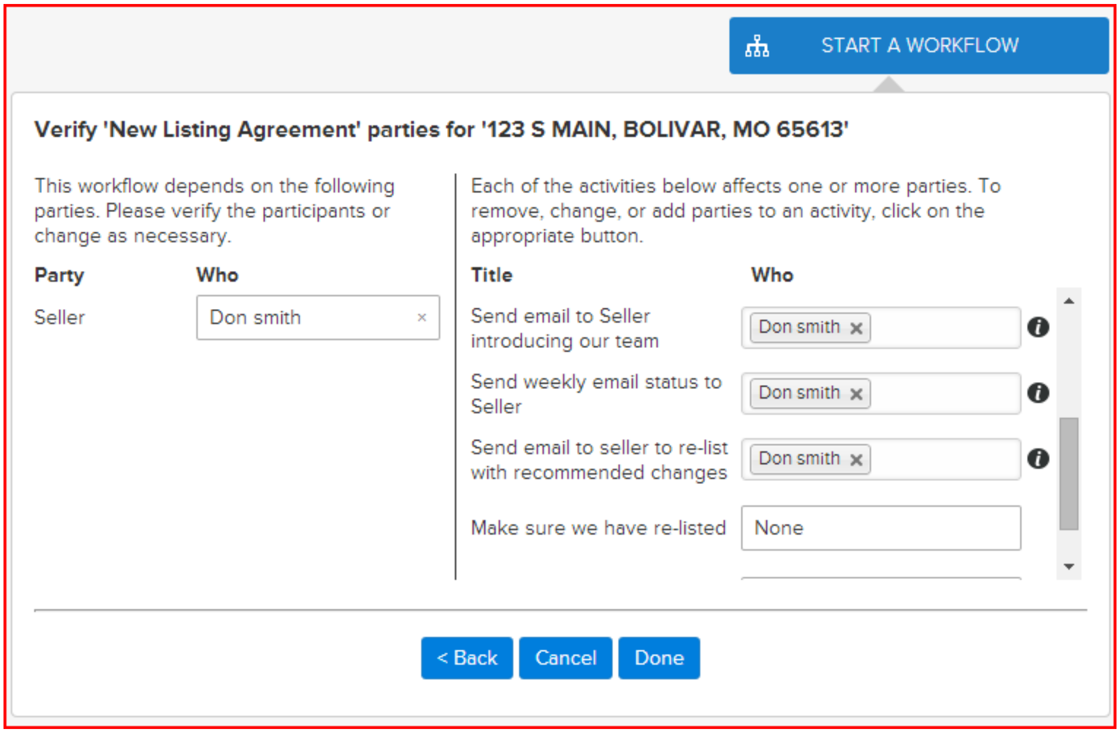
6. Enter milestone dates to calculate individual activity dates.
   a. Changes to milestone dates will recalculate activity dates
      (Click in to the date field to adjust)

   b. Changes to individual activity dates are allowed as needed
      (Click in to the date field to adjust)

   c. Changes to individual “Assigned to” as needed
      (Click the drop down arrow to select a User)



7. If property or transaction then allow user to select party members



If a party member is already assigned in the People tab of a Property or Transaction, the selected contact will show in the Who column. Otherwise select a contact by typing in the name and choosing from the dropdown list.

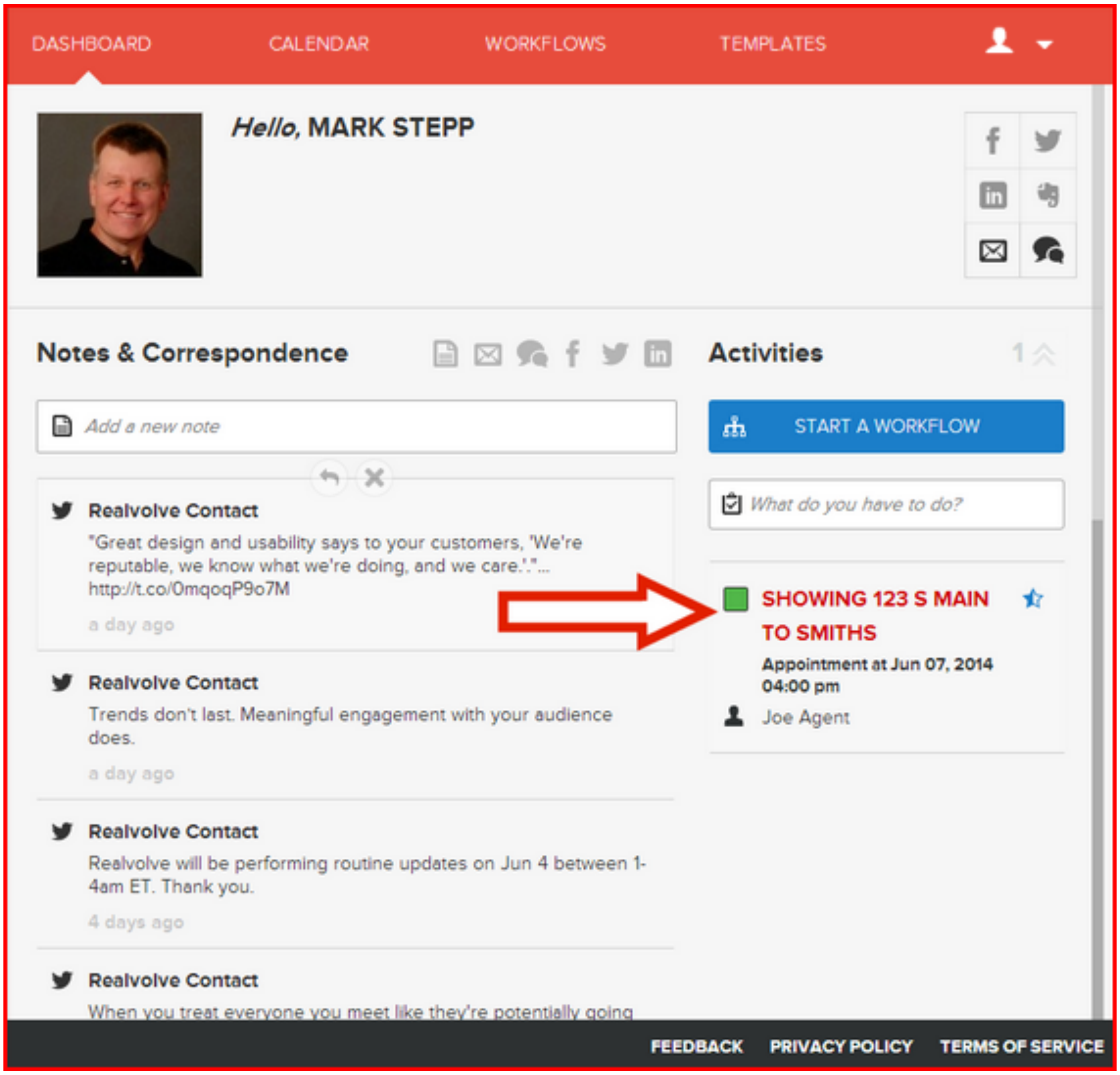
8. Once all known party members have been selected then press **DONE** to complete the workflow wizard process which places the activities in the calendar.

Viewing Workflow Activities

Once your workflow has been started you can view the activities from the following locations:

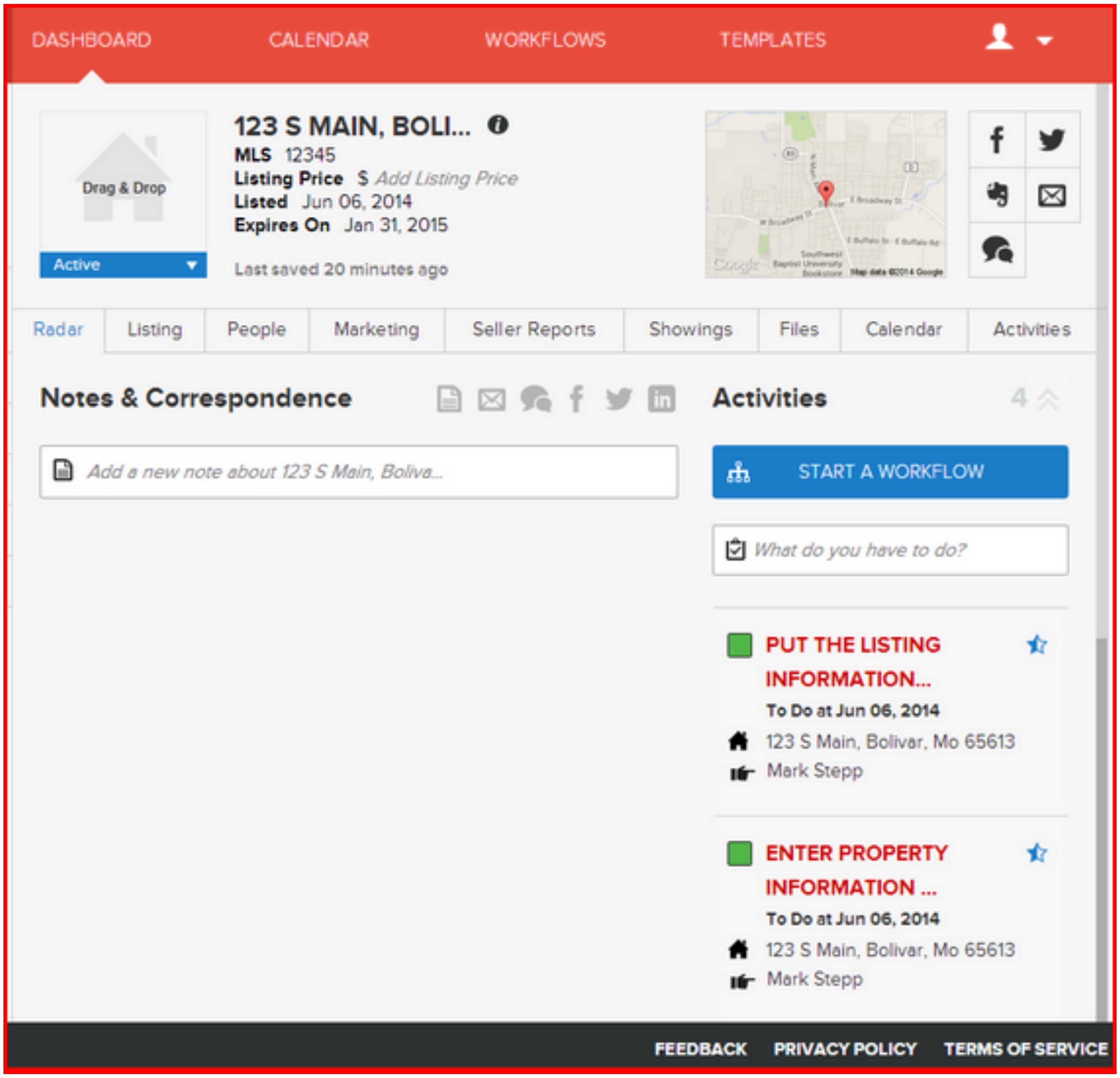
1. **The Dashboard:**

   Each day when you view your main dashboard the system will show you all activities that are Due or Past Due on your dashboard. Complete items from your dashboard each day to keep your schedule clear. Past due items will show the Activity Title in RED.



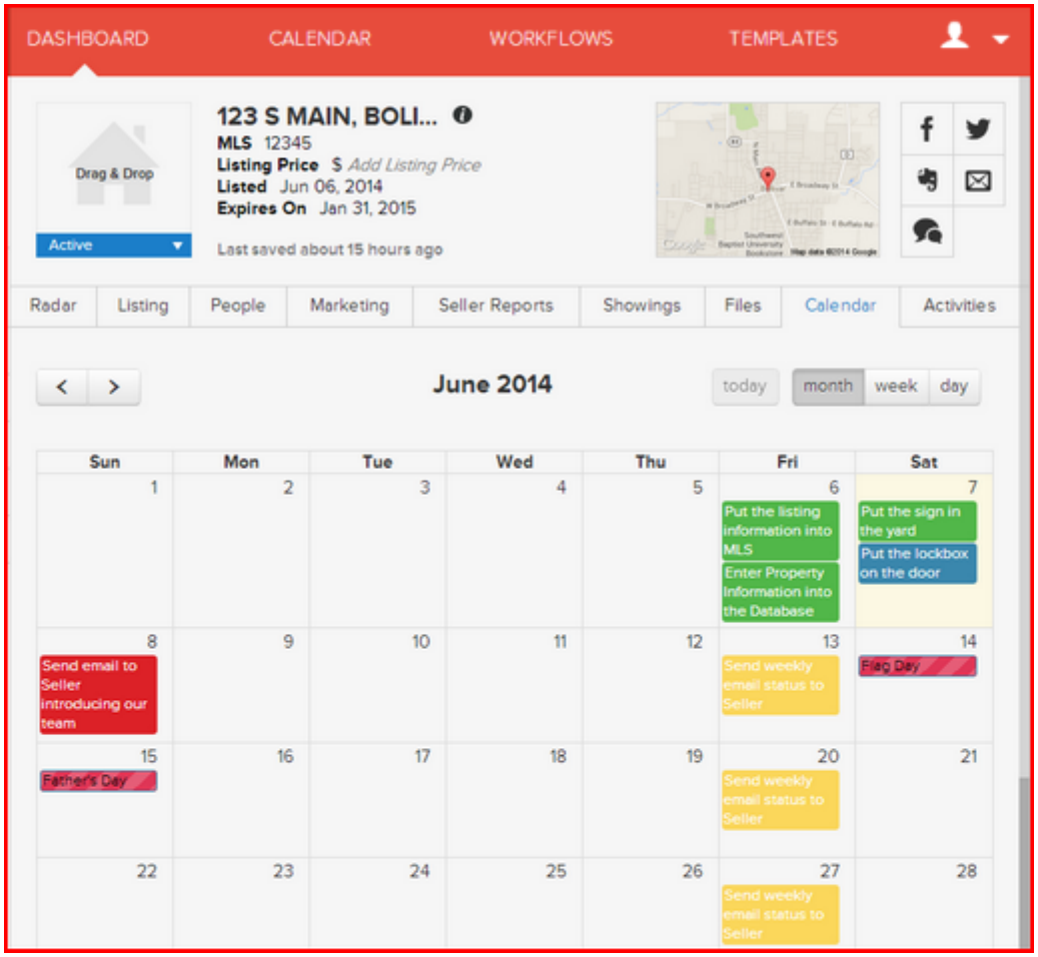
2. The Contact, Property or Transaction Radar tab:

   Similar to the Dashboard view, each Contact, Property and Transaction has a Radar view which shows the items Due or Past Due for that Record.

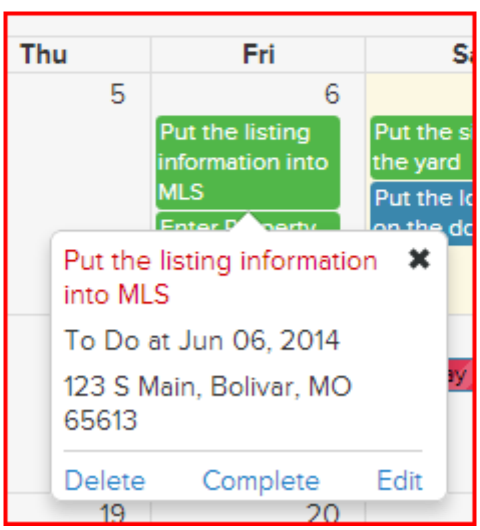


3. The Contact, Property or Transaction Calendar tab:

   From the calendar tab you can see all activities assigned to the Contact, Property or Transaction in a Monthly, Weekly or Daily view.

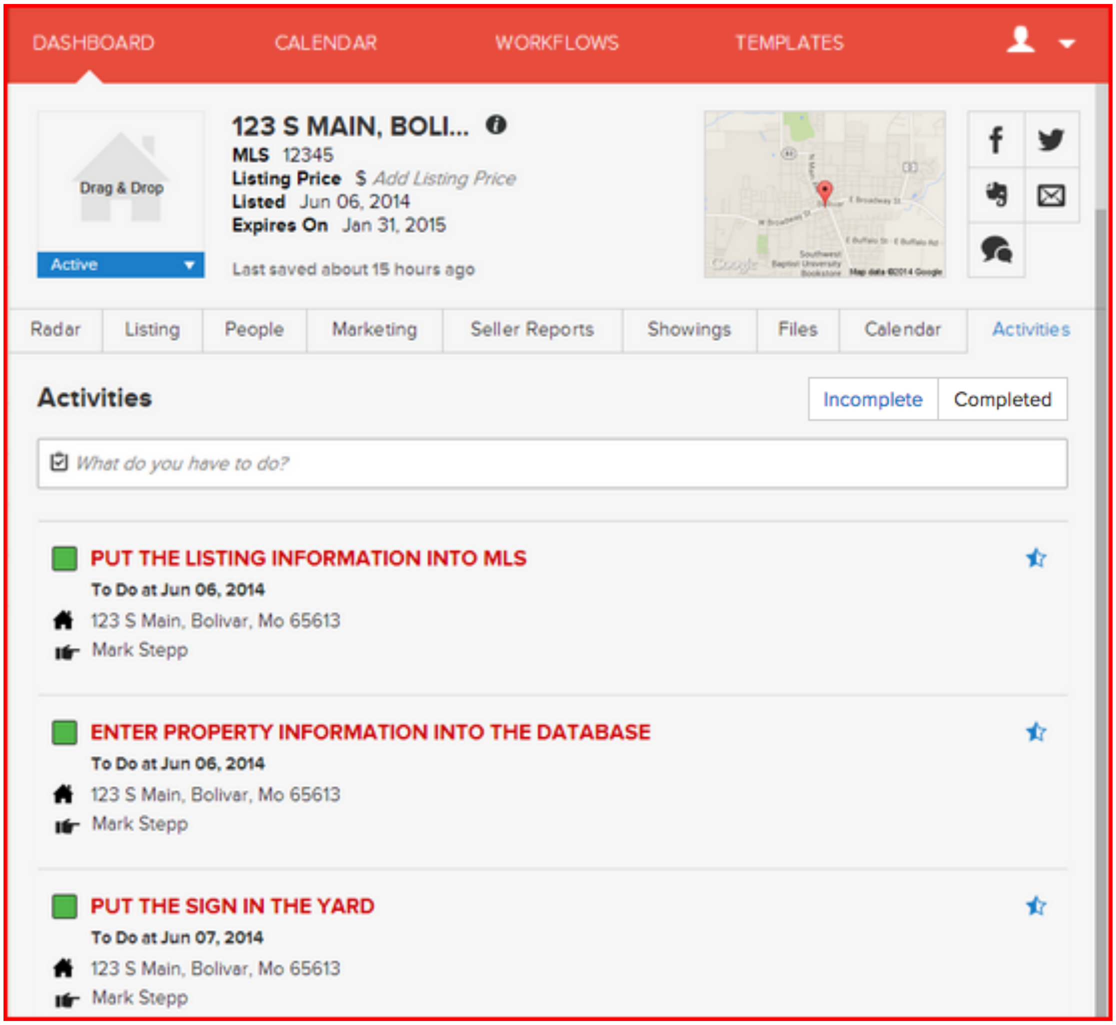


Clicking on an activity gives you the ability to Delete, Complete or Edit the individual Activity.



4. The Contact, Property or Transaction Activities tab:

   Under the Activities tab of a Contact, Property or Transaction the system will show all Activities. Switch between Incomplete and Completed activities using the two buttons in the upper right of the tab.



Completing Workflow Activities:

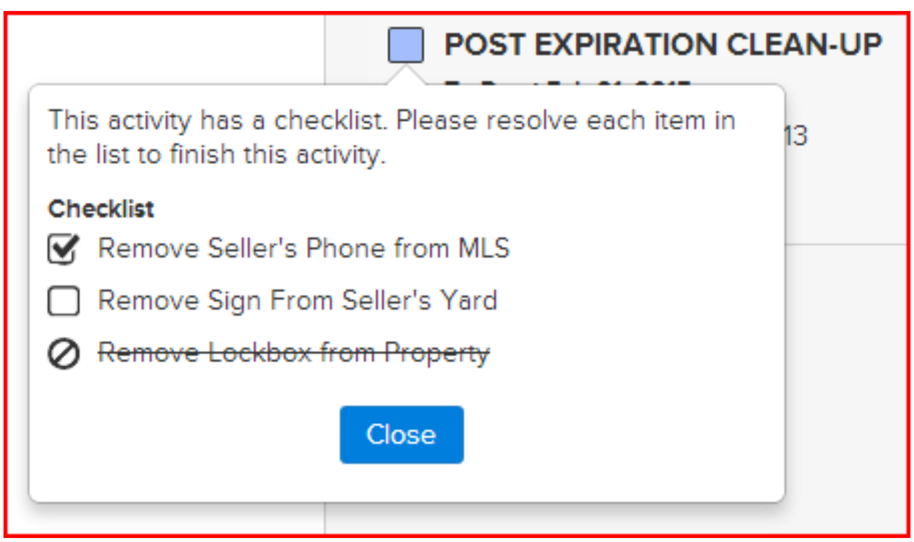
There are 5 possible scenarios for completing activities.

Normal Activities

When the user clicks on the checkbox to complete the activity that has no checklist items or actions, it is marked as done!

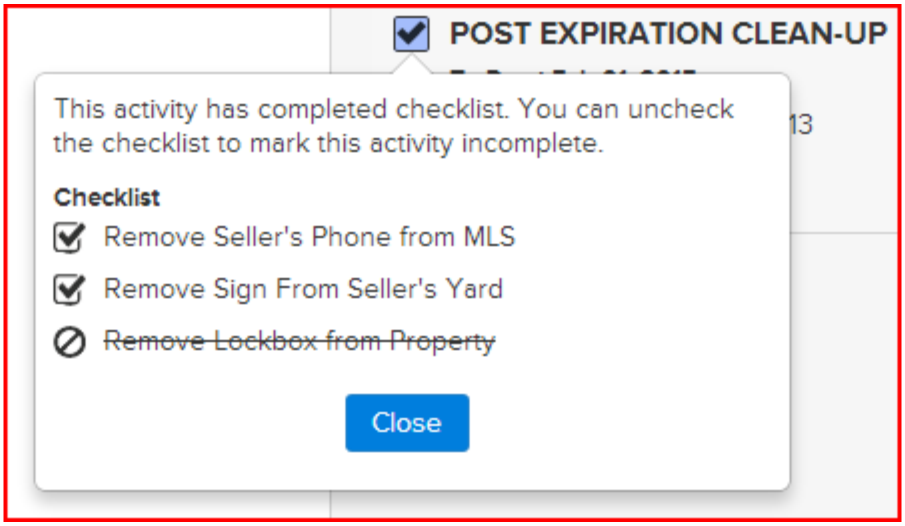
Activities with checklists (not completed) / No Actions

When the user clicks on the checkbox to complete an activity with checklist items and no actions, the popup checklist menu will display to allow the user to mark the items in the list as completed (checked), non-completed (unchecked), or not needed (circle slash).   The Activity checkbox will not be marked as completed while there are UNCHECKED checklist items.



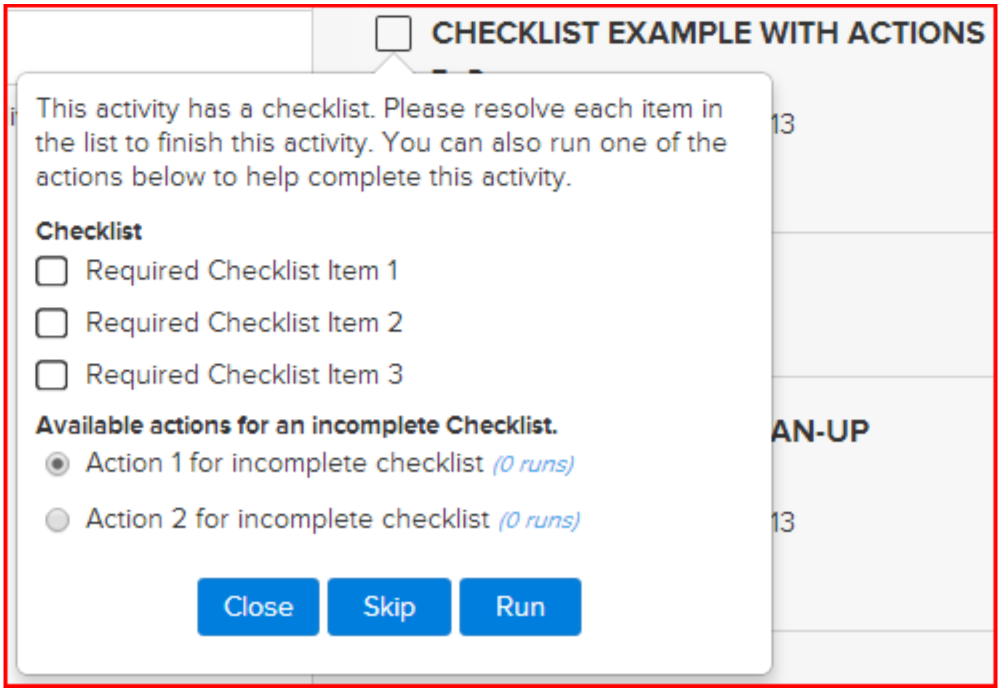
Activities with Checklists (completed) / No Actions

Once all checklist items in the list are either checked or marked as not needed, meaning that there are no unchecked items, then the Activity is marked as done.

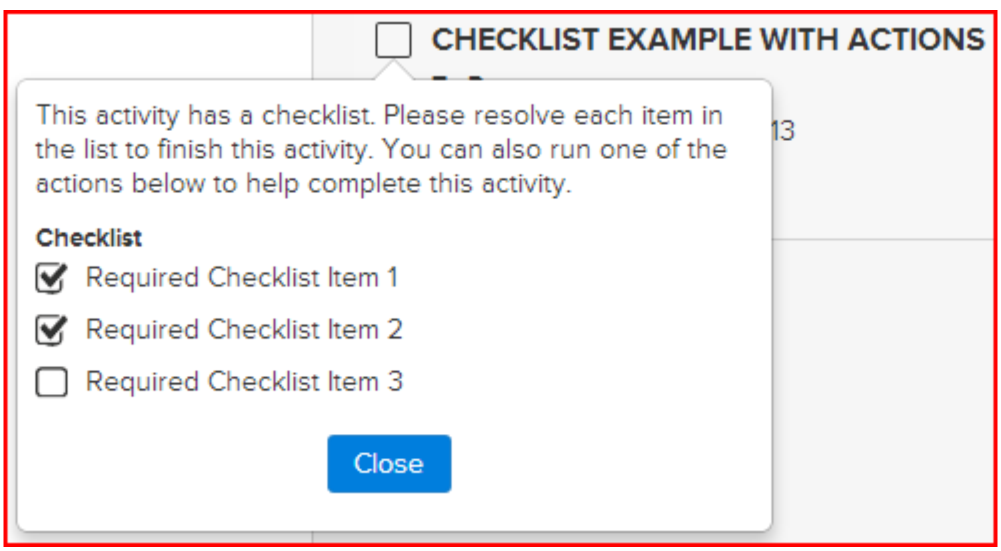


Activities with Checklists (not completed) / Action(s)

When an activity has checklist items that are incomplete (unchecked) and there are one or more Actions marked to be used with an Incomplete checklist, the system will show those actions below the checklist items to allow you to pick the action and run.

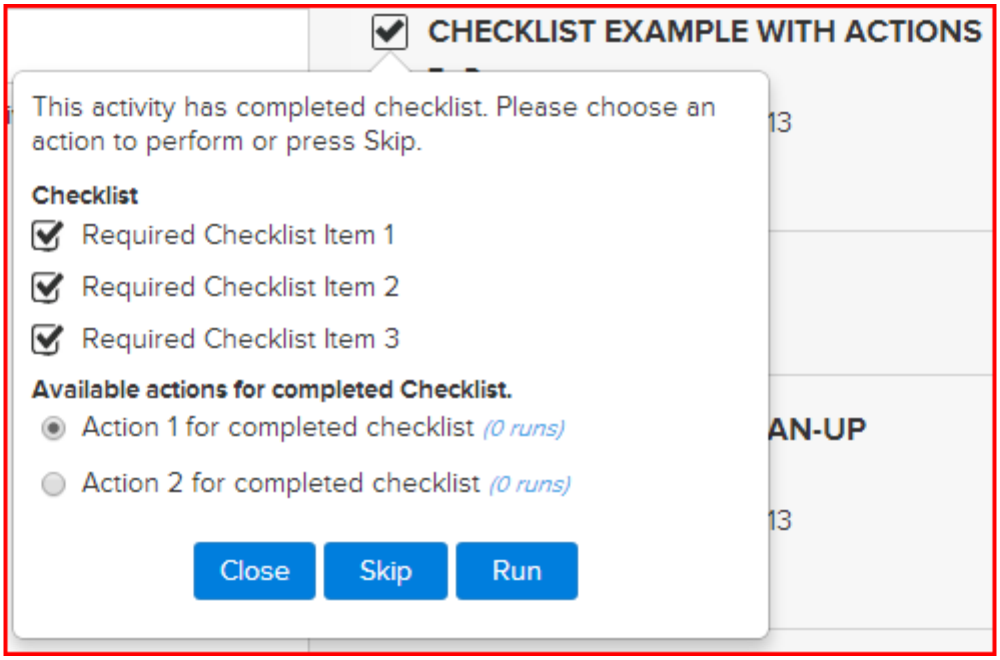


If no Incomplete checklist actions are specified then the actions will be hidden when there are incomplete checklist items.



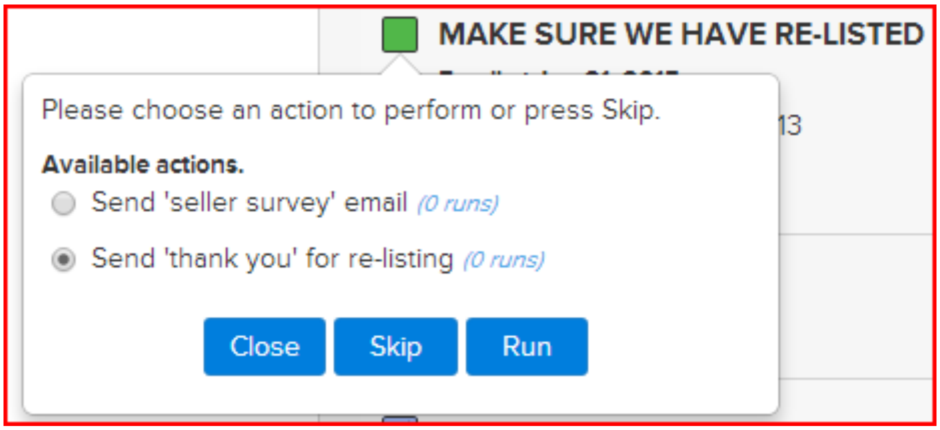
Activities with Checklists (completed) / Action(s)

Once all checklist items are completed and the activity includes one or more actions then the system will show the actions below the checklist area.



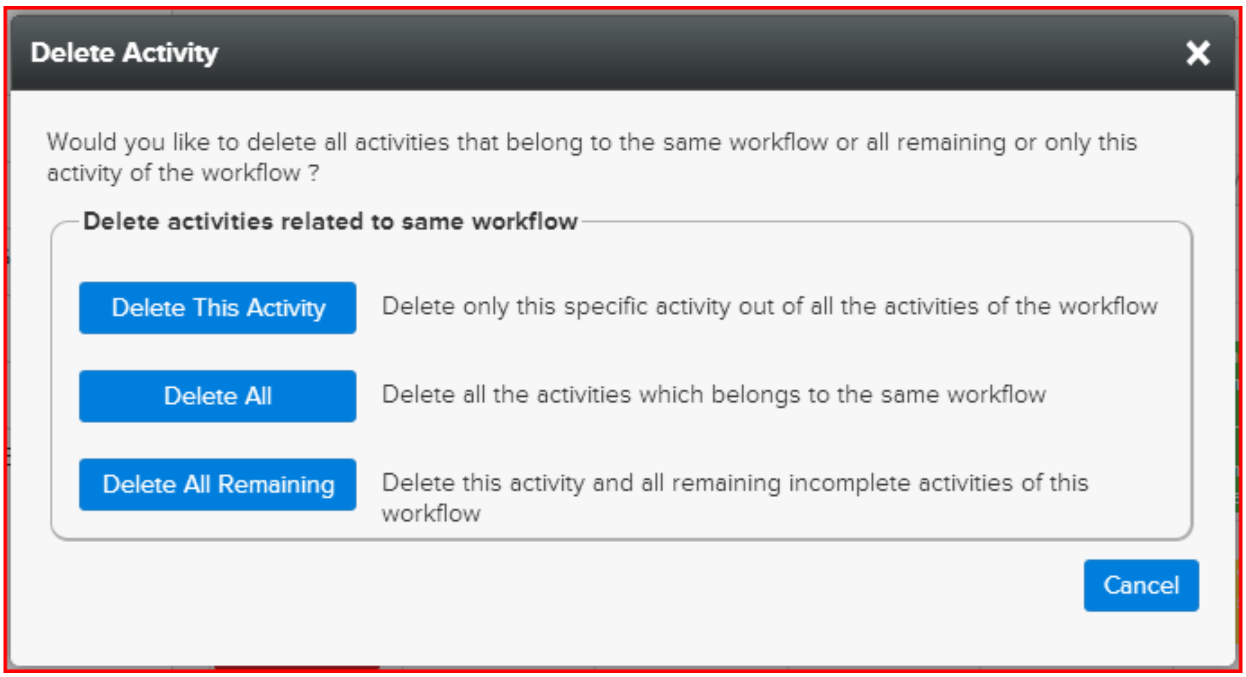
Activities without Checklists / Action(s)

Activities containing actions without checklists will show the available actions when you marked the activity as complete. Once the RUN or SKIP (Do Not Run Action) buttons are pressed then the activity is Marked as done. Click on the Close button to close the popup box without changing the status of the activity.



Deleting Activities in a Workflow

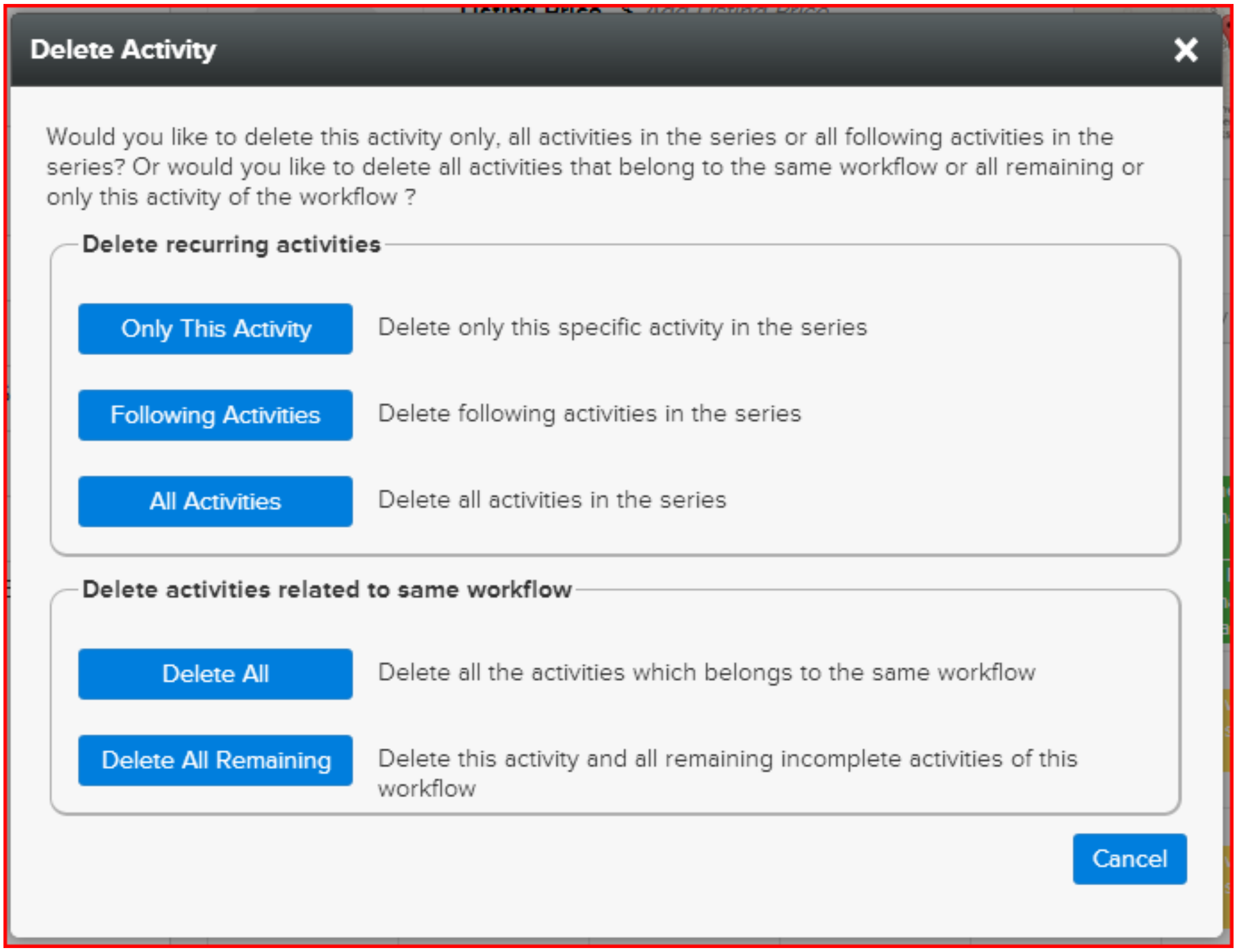
When the delete option on an activity of a workflow is selected, the user is given the option to delete that specific activity using the **Delete This Activity** button. There are times when you need to delete all activities that are in that workflow. Use the **Delete All** button to delete that selected activity and any other activity (complete or incomplete) which is connected to the same workflow. One other possibility exists which is when you want to delete any remaining Incomplete activities in the workflow. Use the **Delete All Remaining** but to keep completed activities in the calendar in order to retain the history of what you have done but delete any non-completed items which are no longer needed.



If you decide that you don’t want to delete any activities then click on the **Cancel** button.

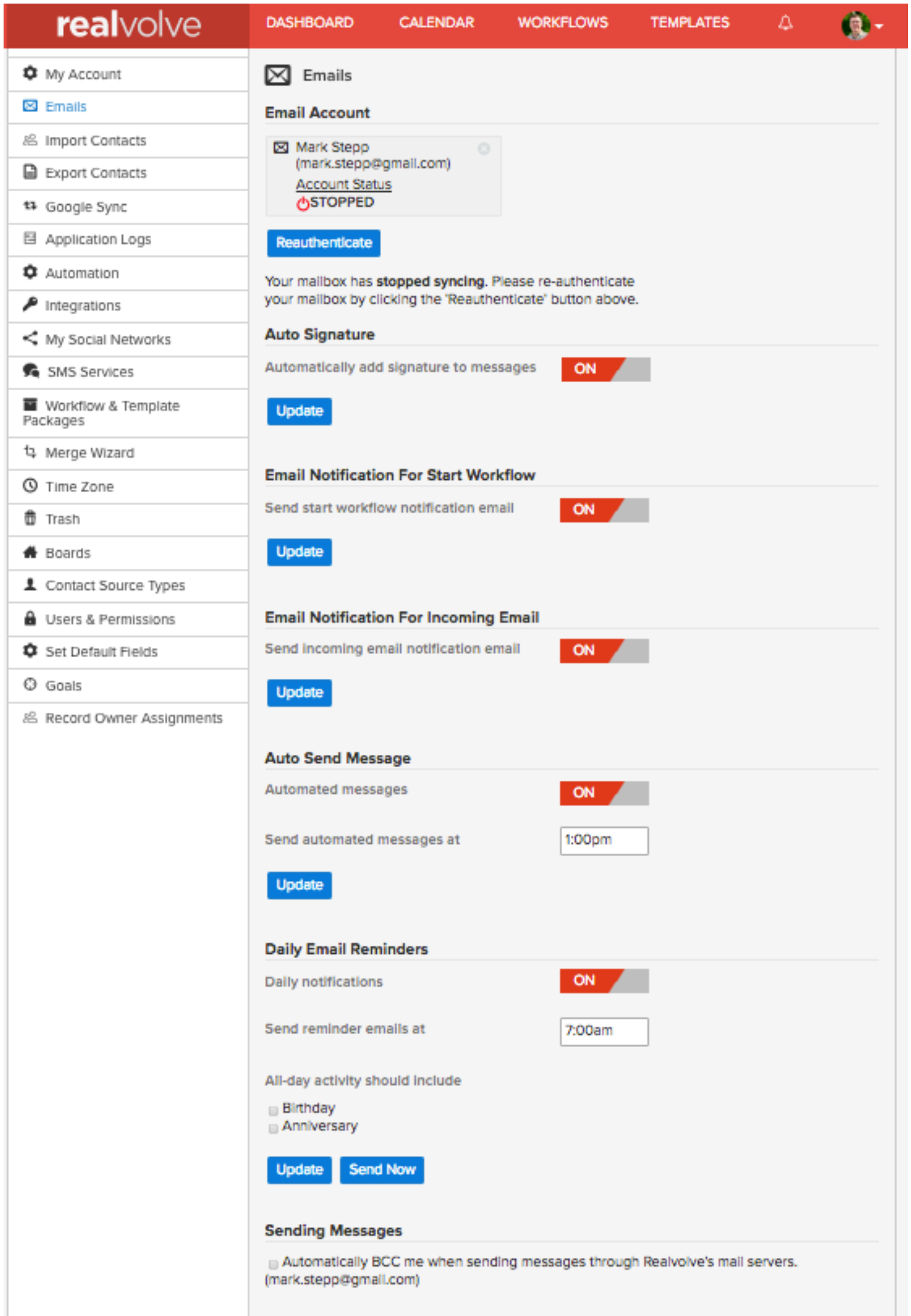
Deleting Repeating Activities in a Workflow

When deleting repeating activities in a workflow the additional options to delete only the one repeating item **Only This Activity**, this activity and any future activities using the **Following Activities** button, or delete all that repeating activity using **All Activities**.

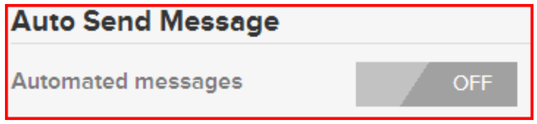


Setting up Automated Emails / Daily Reminders

One of the benefits of having an online system is that it is able to run even when you are not.



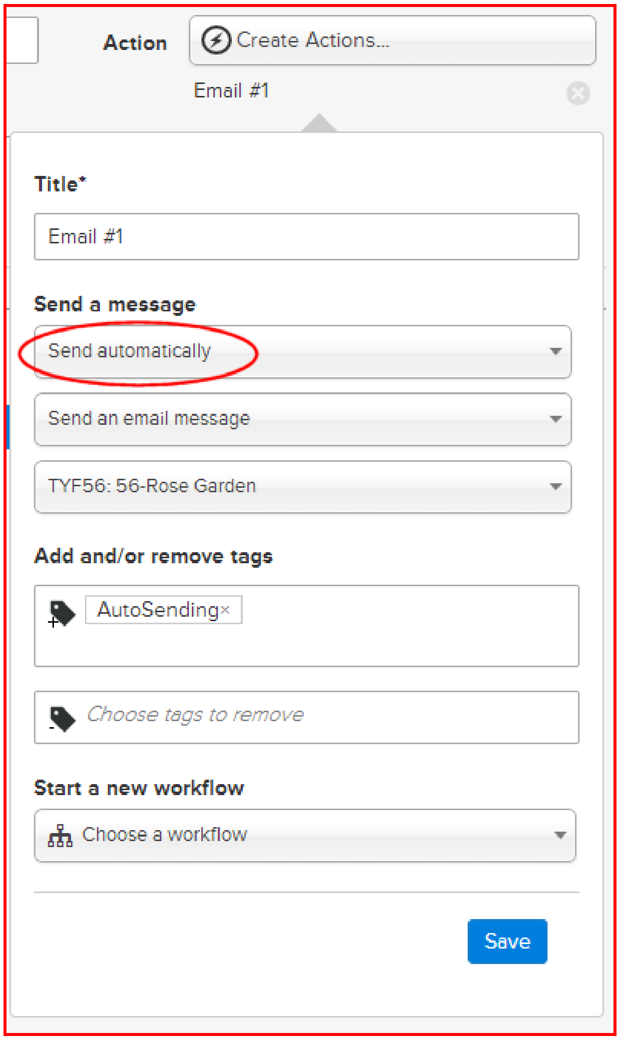
The system can be setup to automatically send emails based on specific times of the day using the time field of the activity. Make sure that the ON/OFF switch for "Automated messages" is ON in order to have Realvolve send them for you automatically.   To turn this feature OFF click on the ON/OFF button again.

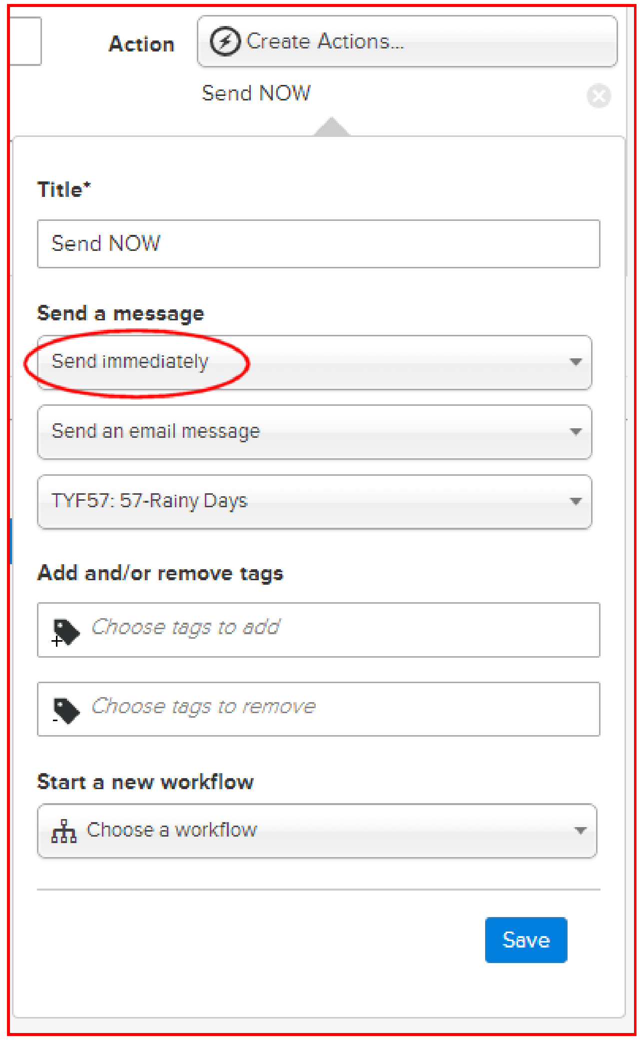


There are activities that are assigned specific dates but not specific times.   If you have specified that an activity sends a message on a specific date but not a specific time, the system will revert to the default sending time selected in the **SETTINGS** > **EMAILS** section.

In the example above the activities setup to be sent automatically but not given a time will be sent at 1:00pm in your selected time zone. Only activities that do not have checklists and only has 1 action will be automatically sent.

IMPORTANT: The ONLY messages that will be sent automatically are those that have the **Send a message** action set for "Send automatically" or "Send Immediately" (see below)





"**Send Automatically**" will send the message on the assigned day at the assigned time or default time.

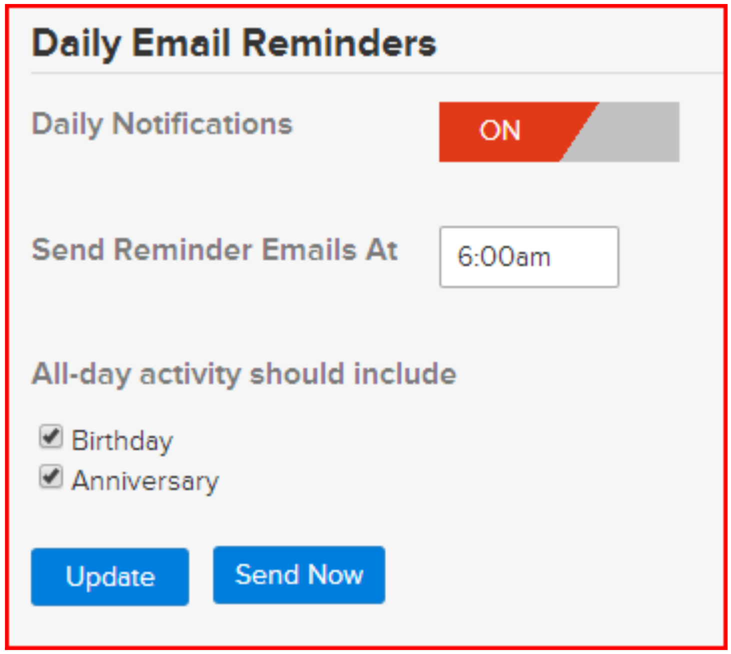
"**Send Immediately**" will send the message <u>as soon as the Activity is added to the calendar</u> and automatically complete the activity. This is useful for the first activity of a workflow from a Zapier.com generated workflow.

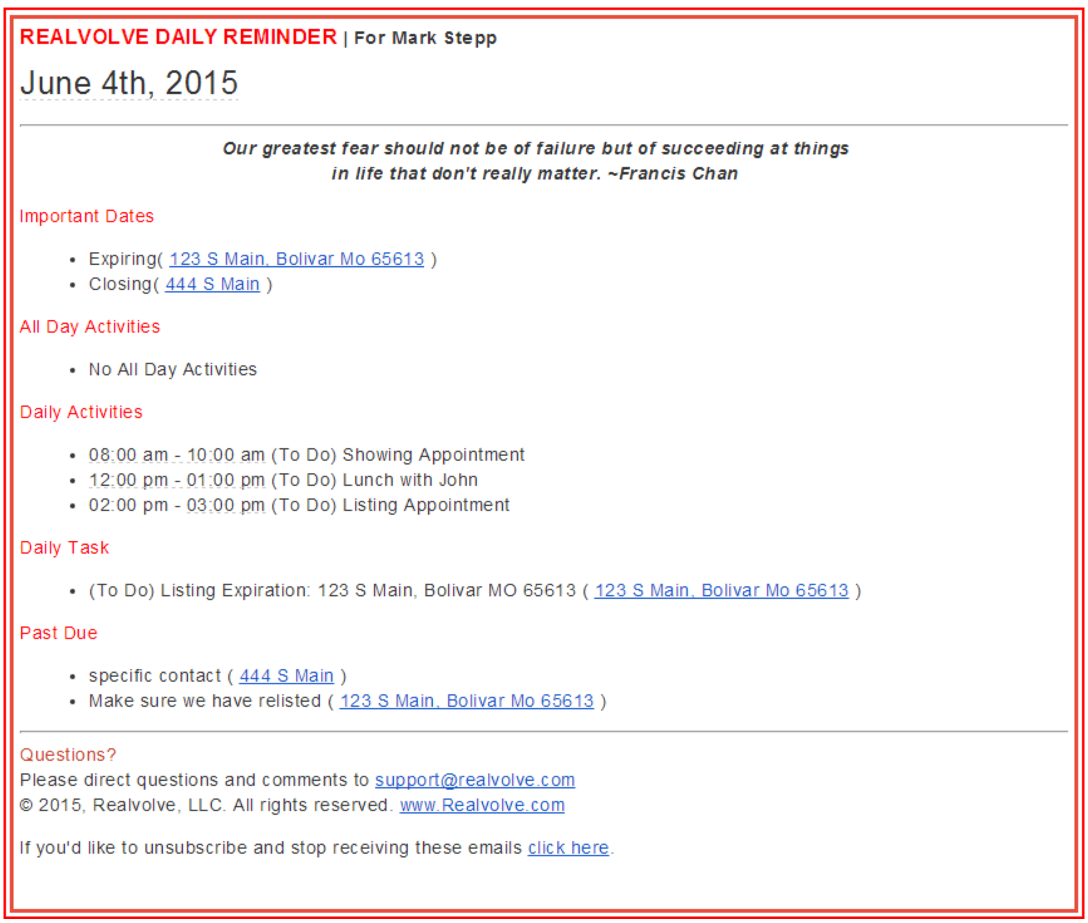
Daily Reminders

Using Daily Notifications, all activities for the day will be emailed to you at the specified time. Important Dates such as listing expirations and transaction closings as well as Birthday / Anniversary reminders for each contact. Appointments and Tasks for the day as well as the preceding day's non-completed items.

The sample email below shows the layout which also includes links to contacts, properties and transactions when needed.

Click on the [**Send Now**] button to send a copy of this email immediately.




REALVOLVE DAILY REMINDER | **For Mark Stepp**

June 4th, 2015

Our greatest fear should not be of failure but of succeeding at things in life that don't really matter. ~Francis Chan

Important Dates

- Expiring(123 S Main, Bolivar Mo 65613)
- Closing(444 S Main)

All Day Activities

- No All Day Activities

Daily Activities

- 08:00 am - 10:00 am (To Do) Showing Appointment
- 12:00 pm - 01:00 pm (To Do) Lunch with John
- 02:00 pm - 03:00 pm (To Do) Listing Appointment

Daily Task

- (To Do) Listing Expiration: 123 S Main, Bolivar MO 65613 (123 S Main, Bolivar Mo 65613)

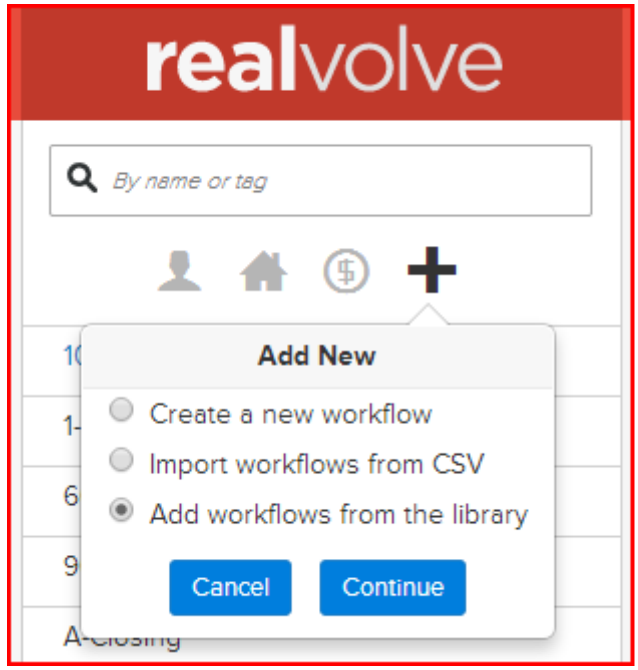
Past Due

- specific contact (444 S Main)
- Make sure we have relisted (123 S Main, Bolivar Mo 65613)

Questions?
Please direct questions and comments to support@realvolve.com
© 2015, Realvolve, LLC. All rights reserved. www.Realvolve.com

If you'd like to unsubscribe and stop receiving these emails click here.

Workflow Library



The most important aspect of the Realvolve workflow system is the ability to be fully customize. I have discussed the importance of setting up workflows that match how individual agents do business. I also know that it takes time to setup a workflow and often an agent wants to have everything setup for them. We have a couple options to help with this problem.

One option is to use the **Workflow Library** which is a depository for workflows from other users or service providers. Click on the **+** sign to add a new workflow and choose "**Add workflows from the library**" to display the available list of saved workflows.

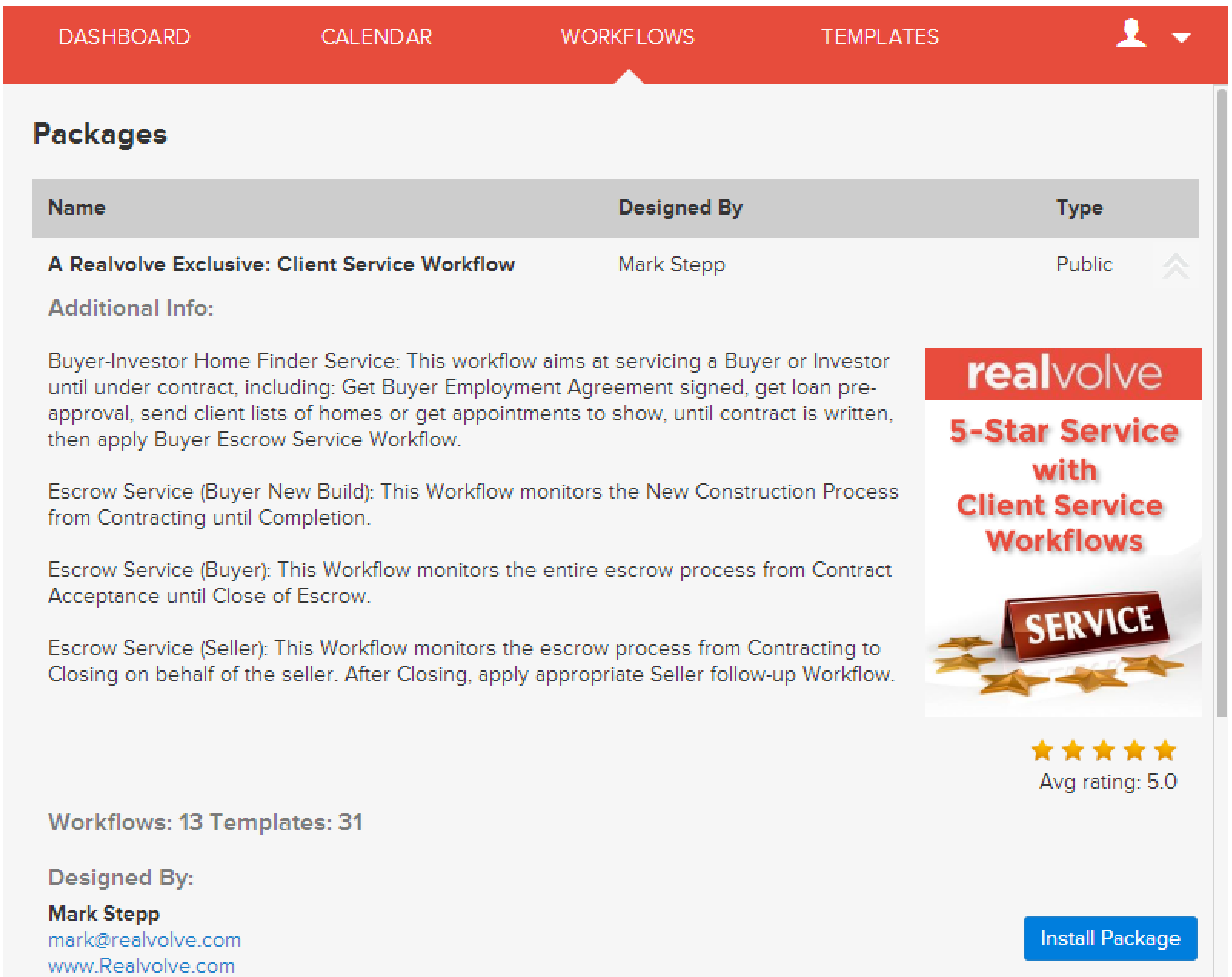
Packages

Name	Designed By	Type
A Realvolve Exclusive: Client Service Workflow	Mark Stepp	Public
Dave Beson: eLetterWriter	Dave Beson	Premium
Dave Beson: LetterWriter	Dave Beson	Premium
Dave Beson: LetterWriter Platinum	Dave Beson	Premium
Dave Beson: LetterWriter Plus	Dave Beson	Premium
Gary David Hall's Email Templates	Gary David Hall	Premium
Gary David Hall's Trans-Plans	Gary David Hall	Premium
Keller Williams: 33 Touch Points and 8x8	Gary Keller	Public
Leslie Ebersole	Leslie Ebersole: The BRIX Group	Premium
Realvolve: New Listing	Mark Stepp	Public
REO Work Flow	Clark Farley	Premium
Schaible Realty	Brad Schaible	Public
The Integrity Team Workflows	Gwen Daubenmeyer	Premium
The Paperless Agent	Garry Wise	Public

The list of Workflow Packages will display showing the Package Name, Designer and Type. To see more detail on a given package simply click on the description line.

There are basically 2 types of workflow packages, Public which are free to use and Premium which require a code to install. Premium workflows usually have some cost associated to them but may still be free to use but may require that you visit a specific website to get a code.

When you click on the description, the system will show the detailed description along with the number of Workflows and Templates that come in the Workflow Package and the contact information of the person that designed it. In the lower right corner will be the **Install Package** button used to copy the Package into your account. If the system requests an Installation Code then visit the designers website for more details on how to get the code.



After the installation process is complete, you can begin using the workflows. Any workflow that gets installed from the library can be modified which includes adding and deleting activities.

Custom Workflow Setup

One option for those users that do not have the time to setup their own workflows and the workflow library does not have what is needed is our Custom Workflow Setup service. Users can submit by email their existing checklists and tempates to allow our workflow specialists to build your custom setup for you. We know that time is money and setting up workflows from your existing checklists may take more time than you have available. If you are interested in our Custom Workflow Setup services, simply email mark@realvolve.com and I would be happy to setup a time that we can discuss your needs. To get the most accurate estimate for the setup I will need you to gather the following:

1. All checklists that you currently use to track your work related tasks and due dates. This includes printed documents, spreadsheets or web forms.
2. All emails that are currently sent as part of follow-up or processing of Listings and Transactions.
3. A list of All staff including names, emails, phone numbers which will need be assigned to activities for any checklists, activities, emails etc…

Appendix A – Blank forms

The following pages contain some basic forms that you can use to help with workflows.

Workflow Worksheet

Workflow Name: ____

Use With: __________________ Tags: __________________________________

Type	Title	Assigned To	#	D/W M/Y	B/A	Key Date Type

Type: Anniversary, Appointment, Birthday, BombBomb, Call, Email, Follow Up, Lunch, Meeting, Text, To Do, Travel

Work Flow Templates

Title			
Use With	Contacts	Properties	Transactions
Description			
Alternate Workflow			
Tags			
Groups	General		
Notes			

Work Flow Stage Templates

Title				
Assign To				
With				
Schedule When				
Tags				
Notes				
Checklist				
Type	Anniversary	Appointment	Bday	BombBomb
	Call	Email	Follow-up	Meal
	Meeting	Text	To-Do	Travel
Color		Priority		
Order				
Category	General			
Reminder				
Frequency				
Action				

Appendix B – Merge Fields

Below is the complete list of all merge fields used in Templates and Activity Checklists.

Contact

Contact#AdditionalAddress
Contact#AdditionalCity
Contact#AdditionalCountry
Contact#AdditionalState
Contact#AdditionalStreetAddress
Contact#AdditionalStreetDirection
Contact#AdditionalStreetName
Contact#AdditionalStreetNumber
Contact#AdditionalStreetZipcode
Contact#AnimotoLink
Contact#AnniversaryDate
Contact#AnnualIncome
Contact#BirthDate
Contact#BlogLink
Contact#Category
Contact#ClientId
Contact#Company
Contact#ContactStatus
Contact#ContactType
Contact#DropboxLink
Contact#EmailFolderLink
Contact#EnhancedGoogleMapLink
Contact#EvernoteLink
Contact#FacebookProfileLink
Contact#FirstName
Contact#GoogleDriveLink
Contact#GooglePlusLink
Contact#Greeting
Contact#HomeAddress
Contact#HomeCity
Contact#HomeCountry
Contact#HomeEmail
Contact#HomeFax
Contact#HomeMap
Contact#HomeMobile
Contact#HomePhone
Contact#HomePurchaseAnniversary
Contact#HomeSaleAnniversary
Contact#HomeState
Contact#HomeStreetAddress
Contact#HomeStreetDirection
Contact#HomeStreetName
Contact#HomeStreetNumber
Contact#HomeWebsite
Contact#HomeZipcode
Contact#InstagramLink
Contact#InterestedInPropertyAddress
Contact#KnownSince
Contact#LastCallDate
Contact#LastEmailDate
Contact#LastName
Contact#LastPersonalNoteDate
Contact#LastPersonalVisitDate
Contact#LifetimeValue
Contact#LinkedinLink
Contact#MailingName
Contact#MainAddress
Contact#MainCity
Contact#MainCountry
Contact#MainState
Contact#MainStreetAddress
Contact#MainStreetDirection
Contact#MainStreetName
Contact#MainStreetNumber
Contact#MainZipcode
Contact#NextAppointmentDate
Contact#NextAppointmentTime
Contact#Photo
Contact#PhotoUrl
Contact#PinterestLink
Contact#PostpoineContactDate
Contact#PreferredContactMethod
Contact#Prefix
Contact#Pronoun-AbsPos(his,hers,theirs)
Contact#Pronoun-Object(him,her,them)
Contact#Pronoun-Personal(he,she,they)
Contact#Pronoun-Possessive(his,her,their)
Contact#RealvolveEmailAddress
Contact#ReferredDate
Contact#ReferredToDate
Contact#RentOwn
Contact#RSSLink
Contact#SavvycardLink
Contact#Sex
Contact#ShowingReport
Contact#ShowingReport-NonSentOnly
Contact#ShowingReport-SentOnly
Contact#Source
Contact#SourceUrl
Contact#Stage

Contact#Suffix
Contact#Title
Contact#TwitterHandle
Contact#WorkAddress
Contact#WorkCity
Contact#WorkCountry
Contact#WorkEmail
Contact#WorkFax
Contact#WorkMap
Contact#WorkMobile
Contact#WorkPhone
Contact#WorkState
Contact#WorkStreetAddress
Contact#WorkStreetDirection
Contact#WorkStreetName
Contact#WorkStreetNumber
Contact#WorkWebsite
Contact#WorkZipcode
Contact#YearMove
Contact#YoutubeLink

Referred By

Replace the ?? with any Contact field name listed above following the # sign.

Contact:ReferredBy#?? Example: **Contact:ReferredBy#MailingName**

Referred To

Replace the ?? with any Contact field name listed above following the # sign.

Contact:ReferredTo#?? Example: **Contact:ReferredTo#MailingName**

Activity

When sending templates using an activity action, the following merge fields are available

Activity#Date
Activity#Note
Activity#Time
Activity#Title
Activity:Checklist#All
Activity:Checklist#Completed
Activity:Checklist#Incomplete
Activity:Checklist#Removed

Others

CurrentDate
CurrentDay-DOW   “Day of Week”
Footer
Greeting
Header
InBusinessSince
MailingName
ServiceArea
Signature
TeamName

Current User

CurrentUser#Address
CurrentUser#CellPhone
CurrentUser#City
CurrentUser#Company
CurrentUser#EmailAddress
CurrentUser#Fax
CurrentUser#FirstName
CurrentUser#HomePhone
CurrentUser#LastName
CurrentUser#Photo
CurrentUser#Pronoun
CurrentUser#State
CurrentUser#StreetAddress
CurrentUser#UserLogo
CurrentUser#Website
CurrentUser#WorkPhone
CurrentUser#Zipcode

Primary User

PrimaryUser#Address
PrimaryUser#CellPhone
PrimaryUser#City
PrimaryUser#Company
PrimaryUser#EmailAddress
PrimaryUser#Fax
PrimaryUser#FirstName
PrimaryUser#HomePhone
PrimaryUser#LastName
PrimaryUser#Photo
PrimaryUser#Pronoun
PrimaryUser#State
PrimaryUser#StreetAddress
PrimaryUser#UserLogo
PrimaryUser#Website
PrimaryUser#WorkPhone
PrimaryUser#Zipcode

Property

General Fields

Property#Acreage
Property#Age
Property#AgentMarketingNarrative
Property#AlarmCode
Property#AlbumPhotos
Property#AnimotoLink
Property#AnnualPropertyTax
Property#AreaInSqFeet
Property#Bedrooms
Property#BlogLink
Property#BuySideCommission
Property#City
Property#County
Property#Directions
Property#DropboxLink
Property#Dues
Property#EmailFolderLink
Property#FullBathrooms
Property#Garage
Property#GarageType
Property#GateCode
Property#GeoState
Property#GoogleDriveLink
Property#GoogleMapCustomUrl
Property#GoogleMapLink
Property#HOA
Property#ImportantListingNotes
Property#InternetMarketingNarrative
Property#ListSideCommission
Property#ListingPrice
Property#ListingType
Property#LockboxNumber
Property#Map
Property#MarketingTagline
Property#MasterBedroomOnMailLevel
Property#Notes
Property#Occupancy
Property#OriginalPrice
Property#OtherCode
Property#OtherInformation
Property#OurWebMarketingNarrative
Property#PartialBathrooms
Property#Photo
Property#PhotoEmbed
Property#PhotoLink
Property#PinterestLink
Property#PrimaryBoardName
Property#PrimaryMLSNumber
Property#PropertyStreetAddress
Property#PropertyType
Property#RealtorLink
Property#RealvolveEmailAddress
Property#RecordOwnerName
Property#SavvycardLink
Property#Schools
Property#SellerReport
Property#SellerReport-NonSentOnly
Property#SellerReport-SentOnly
Property#ShackleCode
Property#ShowingInstructions
Property#SQFT
Property#Status
Property#StreetAddress
Property#Subdivision
Property#Summary
Property#TotalCommission
Property#TruliaLink
Property#UniqueFeatures
Property#VirtualTourLink
Property#WebsiteLink
Property#YearBuilt
Property#YoutubeLink
Property#ZillowLink
Property#Zipcode

Special Note on Address

Property#PropertyStreetAdress	123 S Main Ave, Bolivar MO 65613 US
Property#StreetNumber	123
Property#StreetDirection	S
Property#StreetName	Main Ave
Property#City	Bolivar
Property#GeoState	MO
Property#Zipcode	65613

Property Date Fields

Property#AcquisitionCloseDate
Property#BrochureDeliveryDate
Property#BrokerOpenDate
Property#BuilderApprovalDate
Property#ComingSoonRiderInstalledDate
Property#DateinMLS
Property#DateinRealtorcom
Property#DateinTrulia
Property#DateinZillow
Property#ExpiringDate
Property#GroundRentDueDate
Property#HouseCleaningDate
Property#LastSoldDate
Property#LeaseEndDate
Property#ListingAgreementSignedDate
Property#ListingAgreementSignedReceivedDate
Property#ListingAgreementToSellerDate
Property#ListingAppointmentDate
Property#ListingDate
Property#MarketingAgreementDate
Property#MeasurementDate
Property#MLSTargetDate
Property#OfferSubmittedDate
Property#OpenHouseDate
Property#OrderComingSoonRiderDate
Property#OrderIntakeDate
Property#OrderPhotosDate
Property#PhotographyDate
Property#PhotosReceivedDate
Property#PhotosRescheduledDate
Property#PreListingHomeInspectionDate
Property#PreMarketingDate
Property#PriceReductionDate
Property#PrintAdvertisingDate
Property#RelistedDate
Property#SignInstallDate
Property#SignOrdered
Property#StagingDate
Property#StagingPreviewDate
Property#TVAdvertisingDate
Property#VirtualTourDate
Property#WithdrawnDate

Time Fields

Property#BrokerOpenTime
Property#HouseCleaningTime
Property#ListingAppointmentTime
Property#MeasurementTime
Property#OpenHouseTime
Property#PhotographyTime
Property#PreListingHomeInspectionTime
Property#StagingPreviewTime
Property#StagingTime
Property#VirtualTourTime

Property Party Members

Each property party member type has as series of checklist and template merge fields. Instead of repeating each merge field for each party member type, I've listed the party member types in one section and the individual merge fields in another. Lets say we want to use the **Mailing Name** merge field in a template for the **Asset Manager**. The template merge field is **Property:??????#MailingName** replace the **??????** with the **AssetManager** type to get **Property:AssetManager#MailingName** as the full merge field name.

Party Member Types

Administrator
Architect
AssetManager
Assistant
AuctionRepresentative
BankruptcyAttorney
Builder
Carpenter
CivilEngineer
Contractor
CopyWriter
CoTrustee
ElectricCompany
Electrician
EscrowOfficer
Executor
Gardener
GasCompany
GraphicDesigner
GroundRentOwner
GroundsKeeper
Handyman
HomeownersAssociation
InsideSalesAssociate
InternetServiceProvider
Landlord
Landscaper
ListingCoordinator
Locksmith
MarketingAssistant
MeasurementService
OfficeManager
OpenHouseHost
Painter
Photographer
Plumber
PreListingHomeInspector
PropertyManager
RelocationSpecialist
Seller
Seller2
Seller3
Seller4
SellerAgent
SellerAgent2
SellerAgent3
SellerAgent4
SellerAgentAssistant
SellerAttorney
SellerAttorney2
SellerAttorney3
SellerAttorney4
SellerReferredBy
SellersTitle
SellerTransactionCoordinator
SignInstaller
Stager
Tenant
Tenant2
TermiteInspector
TrashCompany
Trustee
Videographer
VirtualAssistant
WaterCompany

Party Member Merge Fields (CHECKLISTS ONLY)

Note: Party Member contacts can only be selected from a checklist, individual fields of a party member can not be filled in.

- Property#??????

Party Member Merge Fields (TEMPLATES ONLY)

Property:??????#AdditionalAddress
Property:??????#AdditionalCity
Property:??????#AdditionalCountry
Property:??????#AdditionalState
Property:??????#AdditionalStreetAddress
Property:??????#AdditionalStreetDirection
Property:??????#AdditionalStreetName
Property:??????#AdditionalStreetNumber
Property:??????#AdditionalStreetZipcode
Property:??????#AnimotoLink
Property:??????#AnniversaryDate
Property:??????#AnnualIncome
Property:??????#BirthDate
Property:??????#BlogLink
Property:??????#Category
Property:??????#ClientId
Property:??????#Company
Property:??????#ContactStatus
Property:??????#ContactType
Property:??????#DropboxLink
Property:??????#EmailFolderLink
Property:??????#EnhancedGoogleMapLink

Property:??????#EvernoteLink
Property:??????#FacebookProfileLink
Property:??????#FirstName
Property:??????#GoogleDriveLink
Property:??????#GooglePlusLink
Property:??????#Greeting
Property:??????#HomeAddress
Property:??????#HomeCity
Property:??????#HomeCountry
Property:??????#HomeEmail
Property:??????#HomeFax
Property:??????#HomeMap
Property:??????#HomeMobile
Property:??????#HomePhone
Property:??????#HomePurchaseAnniversary
Property:??????#HomeSaleAnniversary
Property:??????#HomeState
Property:??????#HomeStreetAddress
Property:??????#HomeStreetDirection
Property:??????#HomeStreetName
Property:??????#HomeStreetNumber
Property:??????#HomeWebsite
Property:??????#HomeZipcode
Property:??????#InstagramLink
Property:??????#InterestedInPropertyAddress
Property:??????#KnownSince
Property:??????#LastCallDate
Property:??????#LastEmailDate
Property:??????#LastName
Property:??????#LastPersonalNoteDate
Property:??????#LastPersonalVisitDate
Property:??????#LifetimeValue
Property:??????#LinkedinLink
Property:??????#MailingName
Property:??????#MainAddress
Property:??????#MainCity
Property:??????#MainCountry
Property:??????#MainState
Property:??????#MainStreetAddress
Property:??????#MainStreetDirection
Property:??????#MainStreetName
Property:??????#MainStreetNumber
Property:??????#MainZipcode
Property:??????#NextAppointmentDate
Property:??????#NextAppointmentTime
Property:??????#Photo
Property:??????#PhotoUrl
Property:??????#PinterestLink
Property:??????#PostpoineContactDate
Property:??????#PreferredContactMethod
Property:??????#Prefix
Property:??????#Pronoun-AbsPos(his,hers,theirs)
Property:??????#Pronoun-Object(him,her,them)
Property:??????#Pronoun-Personal(he,she,they)
Property:??????#Pronoun-Possessive(his,her,their)
Property:??????#RealvolveEmailAddress
Property:??????#ReferredDate
Property:??????#ReferredToDate
Property:??????#RentOwn
Property:??????#RSSLink
Property:??????#SavvycardLink
Property:??????#Sex
Property:??????#ShowingReport
Property:??????#ShowingReport-NonSentOnly
Property:??????#ShowingReport-SentOnly
Property:??????#Source
Property:??????#SourceUrl
Property:??????#Stage
Property:??????#Suffix
Property:??????#Title
Property:??????#TwitterHandle
Property:??????#WorkAddress
Property:??????#WorkCity
Property:??????#WorkCountry
Property:??????#WorkEmail
Property:??????#WorkFax
Property:??????#WorkMap
Property:??????#WorkMobile
Property:??????#WorkPhone
Property:??????#WorkState
Property:??????#WorkStreetAddress
Property:??????#WorkStreetDirection
Property:??????#WorkStreetName
Property:??????#WorkStreetNumber
Property:??????#WorkWebsite
Property:??????#WorkZipcode
Property:??????#YearMove
Property:??????#YoutubeLink

Transaction

General Fields

Transaction#AnimotoLink
Transaction#BlogLink
Transaction#ClientsAttending
Transaction#ClosingInformation
Transaction#ClosingType
Transaction#DateFunded
Transaction#DropboxLink
Transaction#EarnestDeposit1
Transaction#EarnestDeposit2
Transaction#EmailFolderLink
Transaction#GoogleDriveLink
Transaction#InstagramLink
Transaction#PhotoLink
Transaction#PinterestLink
Transaction#RealtorLink
Transaction#RealvolveEmailAddress
Transaction#SalesPrice
Transaction#SavvycardLink
Transaction#SignAtClose
Transaction#StreetAddress
Transaction#Terms
Transaction#TransactionType
Transaction#TruliaLink
Transaction#VirtualTourLink
Transaction#WebsiteLink
Transaction#YoutubeLink
Transaction#ZillowLink

Property Linked to Transaction

Transaction:Property#Acreage
Transaction:Property#Age
Transaction:Property#AgentMarketingNarrative
Transaction:Property#AlarmCode
Transaction:Property#AlbumPhotos
Transaction:Property#AnimotoLink
Transaction:Property#AnnualPropertyTax
Transaction:Property#AreaInSqFeet
Transaction:Property#Bedrooms
Transaction:Property#BlogLink
Transaction:Property#BuySideCommission
Transaction:Property#City
Transaction:Property#County
Transaction:Property#Directions
Transaction:Property#DropboxLink
Transaction:Property#Dues
Transaction:Property#EmailFolderLink
Transaction:Property#FullBathrooms
Transaction:Property#Garage
Transaction:Property#GarageType
Transaction:Property#GateCode
Transaction:Property#GoogleDriveLink
Transaction:Property#GoogleMapLink
Transaction:Property#ImportantListingNotes
Transaction:Property#InternetMarketingNarrative
Transaction:Property#ListSideCommission
Transaction:Property#ListingPrice
Transaction:Property#LockboxNumber
Transaction:Property#Map
Transaction:Property#MarketingTagline
Transaction:Property#MasterBedroomOnMainLevel
Transaction:Property#Notes
Transaction:Property#Occupancy
Transaction:Property#OriginalPrice
Transaction:Property#OtherCode
Transaction:Property#OtherInformation
Transaction:Property#OurWebMarketingNarrative
Transaction:Property#Photo
Transaction:Property#PhotoEmbed
Transaction:Property#PhotoLink
Transaction:Property#PinterestLink
Transaction:Property#PrimaryBoardName
Transaction:Property#PrimaryMLSNumber
Transaction:Property#PropertyStreetAddress
Transaction:Property#PropertyType
Transaction:Property#RealtorLink
Transaction:Property#RealvolveEmailAddress
Transaction:Property#RecordOwnerName
Transaction:Property#SavvycardLink
Transaction:Property#Schools
Transaction:Property#SellerReport
Transaction:Property#SellerReport-NonSentOnly
Transaction:Property#SellerReport-SentOnly
Transaction:Property#ShackleCode
Transaction:Property#ShowingInstructions
Transaction:Property#SignAtClose
Transaction:Property#SQFT
Transaction:Property#Status
Transaction:Property#StreetAddress
Transaction:Property#Subdivision
Transaction:Property#Summary
Transaction:Property#TotalCommission
Transaction:Property#TruliaLink
Transaction:Property#UniqueFeatures
Transaction:Property#VirtualTourLink
Transaction:Property#WebsiteLink

Transaction:Property#YearBuilt
Transaction:Property#YoutubeLink
Transaction:Property#ZillowLink
Transaction:Property#Zipcode

Special Note on Address

Tranaction#StreetAdress	123 S Main Ave, Bolivar MO 65613 US
Tranaction#StreetNumber	123
Tranaction#StreetDirection	S
Tranaction#StreetName	Main Ave
Tranaction#City	Bolivar
Tranaction#GeoState	MO
Tranaction#Zipcode	65613

Transaction Date Fields

Transaction#AcceptanceDate
Transaction#AcceptanceDeadlineDate
Transaction#AgentEvaluationDate
Transaction#AlternativeEarnestDeadlineDate
Transaction#ApplicationDeadlineDate
Transaction#Appraisal2CompsSentDate
Transaction#Appraisal2Date
Transaction#AppraisalContingencyDate
Transaction#AppraisalDate
Transaction#AppraisalDeadlineDate
Transaction#AppraisalObjectionDeadlineDate
Transaction#AppraisalOrderedDate
Transaction#AppraisalReceivedDate
Transaction#AppraisalResolutionDeadlineDate
Transaction#AppraiserInspectionOfLenderRepairsDate
Transaction#AssociationApplicationDueDate
Transaction#AssociationApprovalDeadline
Transaction#AttorneyContingencyDate
Transaction#AttorneyReviewDate
Transaction#BuilderApprovalDate
Transaction#BuyerAttorneyApprovalDate
Transaction#BuyerGrantReceivedDate
Transaction#BuyerReferralDate
Transaction#BuyerSettlementDate
Transaction#BuyerSignedContractDate
Transaction#CertificateOfOccupancyDate
Transaction#ChecklistReceivedDate
Transaction#ChecklistSentDate
Transaction#ChimneyInspectionContingencyDate
Transaction#ChimneyInspectionDate
Transaction#CityInspectionDate
Transaction#CleartoCloseDate
Transaction#ClosingDate
Transaction#ClosingDocumentDeliveryDeadlineDate
Transaction#ClosingTargetDate
Transaction#CommissionApprovedDate
Transaction#CommitmentDeadlineDate
Transaction#CompsSentToAppraisersDate
Transaction#ConditionalSaleDeadlineDate
Transaction#CondoDocsObjectionDeadlineDate
Transaction#CondoDocsReceivedDate
Transaction#CondoDocsRequestedDate
Transaction#ContingencyDate
Transaction#ContingentSaleCloseDate
Transaction#ContingentSaleContractDate
Transaction#ContractDate
Transaction#ContractExpirationDate
Transaction#CreditInformationDeadlineDate
Transaction#CreditInformationDisapprovalDeadlineDate
Transaction#CreditOrderedDate
Transaction#CreditReceivedDate
Transaction#DateFunded
Transaction#DeliveryofEarnestMoneyDate
Transaction#DisclosureReceivedDate
Transaction#DueDiligenceDocumentsDeliveryDeadlineDate
Transaction#DueDiligenceDocumentsObjectionDeadlineDate
Transaction#DueDiligenceDocumentsResolutionDeadlineDate
Transaction#DueDiligenceExpirationDate
Transaction#ECADDueDate
Transaction#EffectiveDate
Transaction#EnvironmentalInspectionDate
Transaction#ExistingLoanDocumentsDeadlineDate
Transaction#ExistingLoanDocumentsObjectionDeadlineDate
Transaction#FellThroughDate
Transaction#FinalWalkthroughDate
Transaction#FinanceDeadlineDate
Transaction#FinancialCommitmentDate
Transaction#FinancingContingencyDate
Transaction#FinancingCreditApprovalDate
Transaction#FireInspectionDate
Transaction#FirstEarnestDueDate
Transaction#FullyExecutedHomeInspectionReceivedDate
Transaction#GasInspectionDate
Transaction#GasInspectionResolutionDate
Transaction#GeologicalInspectionDate
Transaction#GroundRentDueDate
Transaction#GuarantorSignatureDate
Transaction#HeadLandlordApprovalDate
Transaction#HOADocsDeliveredDate
Transaction#HOADocsOrderedDate
Transaction#HOADocumentsDeadlineDate
Transaction#HOADocumentsObjectionDeadlineDate
Transaction#HOADueDate
Transaction#HomeInspectionContingencyDate
Transaction#HomeInspectionDate
Transaction#HomeInspectionRepairsCompletedDate
Transaction#HomeInspectionRepairsReceiptsReceivedDate
Transaction#HomeInspectionReportReceivedDate
Transaction#Homeowner'sInsuranceReceivedDate
Transaction#HomeWarrantyOrderedDate
Transaction#HouseCleaningDate
Transaction#HUDReceivedDate
Transaction#HUDReviewedDate
Transaction#IdentificationContingencyDate
Transaction#Income/CreditVerificationDate
Transaction#InitialContactDate
Transaction#InspectionContingencyExpDate
Transaction#InspectionObjectionDeadlineDate
Transaction#InspectionResolutionDeadlineDate
Transaction#LastInspectionDate
Transaction#LeadPaintContingencyDate
Transaction#LeadPaintInspectionDate
Transaction#LeaseAgreementDate
Transaction#LeaseEndDate
Transaction#LeaseSignedDate
Transaction#LeaseStartDate
Transaction#LenderApplyByDate
Transaction#LenderAppraisalDate
Transaction#LenderRequiredRepairsCompletedDate
Transaction#LenderRespondDate
Transaction#LoanApplicationDate
Transaction#LoanApplicationDueDate
Transaction#LoanApprovalDate
Transaction#LoanCommitmentDueDate
Transaction#LoanCommitmentReceivedDate
Transaction#LoanObjectionDeadlineDate
Transaction#LoanTransferApprovalDeadlineDate
Transaction#MoldInspectionContingencyDate
Transaction#MoldInspectionDate
Transaction#MortgageApprovalDate

Transaction#MoveInDate
Transaction#MoveOutDate
Transaction#NoticeDate
Transaction#OfferDeliveryDate
Transaction#OfferExpirationDate
Transaction#OffRecordTitleDeadlineDate
Transaction#OffRecordTitleObjectionDeadlineDate
Transaction#OptionExpirationDate
Transaction#PercolationTestContingencyDate
Transaction#PercolationTestDate
Transaction#PestInspectionDate
Transaction#PoolInspectionDate
Transaction#PossessionDate
Transaction#PreApprovalLetterDueDate
Transaction#PreliminaryHUDReviewedDate
Transaction#PrivateFinancingDeadlineDate
Transaction#ProcessingSentDate
Transaction#ProjectedCloseDate
Transaction#ProjectedMoveOutDate
Transaction#PropertyInsuranceObjectionDeadlineDate
Transaction#PurchaseAgreementDate
Transaction#RadonContingencyDate
Transaction#RadonDropDate
Transaction#RadonPickupDate
Transaction#RatificationDate
Transaction#RecordTitleDeadlineDate
Transaction#RecordTitleObjectionDeadlineDate
Transaction#ReinspectionDueDate
Transaction#RenewalDate
Transaction#RepairAgreementDate
Transaction#RepairsCompletedDate
Transaction#RepairsDueDate
Transaction#ResaleCertDueDate
Transaction#RetrofitInspectionDate
Transaction#RightofFirstRefusalDeadlineDate
Transaction#RoofInspectionDate
Transaction#SaleofBuyer'sHomeDate
Transaction#SatisfactionofInspectionContingencyDate
Transaction#SecondEarnestDueDate
Transaction#SellerAttorneyApprovalDate
Transaction#SellerDisclosureDueDate
Transaction#SellerReferralDate
Transaction#SellerResponseToHomeInspectionReceivedDate
Transaction#SellerSettlementDate
Transaction#SepticInspectionContingencyDate
Transaction#SepticInspectionDate
Transaction#SewerInspectionDate
Transaction#SewerScopeDate
Transaction#ShortSaleAcceptanceDate
Transaction#SmokeCertificationInspectionDate
Transaction#SmokeCertificationReceivedDate
Transaction#StagingRemovalDate
Transaction#StatusCertificateContingencyDate
Transaction#StatusCertificateDeliveredtoLawyerDate
Transaction#StatusCertificateOrderedDate
Transaction#StructuralInspectionDate
Transaction#SurveyContingencyDate
Transaction#SurveyDate
Transaction#SurveyDeadlineDate
Transaction#SurveyObjectionDeadlineDate
Transaction#SurveyResolutionDeadlineDate
Transaction#TermiteInspectionContingencyDate
Transaction#TermiteInspectionDate
Transaction#TermiteReportReceivedDate
Transaction#TestimonialReceivedDate
Transaction#TestimonialRequestedDate
Transaction#ThirdPartyApprovalDate
Transaction#TitleCommitmentDueDate
Transaction#TitleOrderedDate
Transaction#TitleReceivedDate
Transaction#TitleResolutionDeadlineDate
Transaction#TitleSigningDate
Transaction#UnderContractSignInstalledDate
Transaction#UnderwritingConditionDate
Transaction#VerificationofFundsDueDate
Transaction#WaterInspectionDate
Transaction#WellInspectionContingencyDate
Transaction#WellInspectionDate
Transaction#WindstormInspectionDate

Time Fields

Transaction#AcceptanceDeadlineTime
Transaction#AppraisalTime
Transaction#AttorneyReviewTime
Transaction#BuyerSettlementTime
Transaction#ChimneyInspectionTime
Transaction#CityInspectionTime
Transaction#ClosingTime
Transaction#ContractTime
Transaction#EnvironmentalInspectionTime
Transaction#FinalWalkthroughTime
Transaction#GeologicalInspectionTime
Transaction#HomeInspectionTime
Transaction#LastInspectionTime
Transaction#LeadPaintInspectionTime
Transaction#MoveInTime
Transaction#MoveOutTime
Transaction#PestInspectionTime
Transaction#PoolInspectionTime
Transaction#PossessionTime
Transaction#RadonDropTime
Transaction#RadonPickupTime
Transaction#RepairsCompletedTime
Transaction#SellerSettlementTime
Transaction#SepticInspectionTime
Transaction#SewerInspectionTime
Transaction#StructuralInspectionTime
Transaction#TermiteInspectionTime
Transaction#WaterInspectionTime

Transaction Party Members

Each transaction party member type has as series of checklist and template merge fields. Instead of repeating each merge field for each party member type, I've listed the party member types in one section and the individual merge fields in another. Lets say we want to use the **Mailing Name** merge field in a template for the **Asset Manager**. The template merge field is **Transaction:??????#MailingName** replace the **??????** with the **AssetManager** type to get **Transaction:AssetManager#MailingName** as the full merge field name.

Party Member Types

Accountant
AdditionalInspector1
AdditionalInspector2
Administrator
Appraiser
Appraiser2
Architect
AsbestosInspector
AssetManager
Assistant
AuctionRepresentative
Bank1stTrust
Bank2ndTrust
BankruptcyAttorney
Bookkeeping
Builder
Buyer
Buyer2
Buyer3
Buyer4
BuyerAgent
BuyerAgent2
BuyerAgent3
BuyerAgent4
BuyerAgentAssistant
BuyerAttorney
BuyerAttorneyParalegal
BuyerReferredBy
BuyersTitle
BuyerTransactionCoordinator
Carpenter
ChimneyInspector
CivilEngineer
ClientServices
ClosingAgent
ClosingLocation
Contractor
CopyWriter
CoTrustee
ElectricCompany
Electrician
EscrowOfficer
EscrowOfficerAssistant
Executor
FireInspector
Gardener
GasCompany
GraphicDesigner
GroundRentOwner
GroundsKeeper
Handyman
HomeInspector
HomeownersAssociation
HomeWarrantyCompany
HVACInspector
InsideSalesAssociate
InsuranceCompany
InternetServiceProvider
Landlord
Landscaper
LeadPaintInspector
ListingCoordinator
LoanOfficerAssistant
LoanOfficer/Lender
LoanOfficer/Lender2
LoanProcessor
Locksmith
MarketingAssistant
MeasurementService
MoldInspector
MortgageBroker
MortgageBroker2
MortgageCloser
MortgageOriginator
MortgageProcessor
MovingCompany
OfficeManager
OpenHouseHost
Painter
PercolationInspector
PestInspector
Photographer
Plumber
PoolInspector
PreListingHomeInspector
PropertyManager
RADONInspectionCompany
RelocationSpecialist
RoofInspector
Seller
Seller2
Seller3
Seller4
SellerAgent
SellerAgent2
SellerAgent3
SellerAgent4
SellerAgentAssistant
SellerAttorney
SellerAttorney2
SellerAttorney3
SellerAttorney4
SellerAttorneyParalegal
SellerReferredBy
SellersTitle
SellerTransactionCoordinator
SepticInspector
SettlementCompany
SettlementLocation
ShortSaleNegotiator
SignInstaller
Stager
StructuralInspector
Surveyor
Tenant
Tenant2
TermiteInspector
TransactionCoordinator
TrashCompany
Trustee
Videographer
VirtualAssistant
WaterCompany
WaterInspector
WellInspector

Party Member Merge Fields (CHECKLIST ONLY)

Note: Party Member contacts can only be selected from a checklist, individual fields of a party member can not be filled in.

- Transaction#??????

Party Member Merge Fields (TEMPLATES ONLY)

Transaction:??????#AdditionalAddress
Transaction:??????#AdditionalCity
Transaction:??????#AdditionalCountry
Transaction:??????#AdditionalState
Transaction:??????#AdditionalStreetAddress
Transaction:??????#AdditionalStreetDirection
Transaction:??????#AdditionalStreetName
Transaction:??????#AdditionalStreetNumber
Transaction:??????#AdditionalStreetZipcode
Transaction:??????#AnimotoLink
Transaction:??????#AnniversaryDate
Transaction:??????#AnnualIncome
Transaction:??????#BirthDate
Transaction:??????#BlogLink
Transaction:??????#Category
Transaction:??????#ClientId
Transaction:??????#Company
Transaction:??????#ContactStatus
Transaction:??????#ContactType
Transaction:??????#DropboxLink
Transaction:??????#EmailFolderLink
Transaction:??????#EnhancedGoogleMapLink
Transaction:??????#EvernoteLink
Transaction:??????#FacebookProfileLink
Transaction:??????#FirstName
Transaction:??????#GoogleDriveLink
Transaction:??????#GooglePlusLink
Transaction:??????#Greeting
Transaction:??????#HomeAddress
Transaction:??????#HomeCity
Transaction:??????#HomeCountry
Transaction:??????#HomeEmail
Transaction:??????#HomeFax
Transaction:??????#HomeMap
Transaction:??????#HomeMobile
Transaction:??????#HomePhone
Transaction:??????#HomePurchaseAnniversary
Transaction:??????#HomeSaleAnniversary
Transaction:??????#HomeState
Transaction:??????#HomeStreetAddress
Transaction:??????#HomeStreetDirection
Transaction:??????#HomeStreetName
Transaction:??????#HomeStreetNumber
Transaction:??????#HomeWebsite
Transaction:??????#HomeZipcode
Transaction:??????#InstagramLink
Transaction:??????#InterestedInPropertyAddress
Transaction:??????#KnownSince
Transaction:??????#LastCallDate
Transaction:??????#LastEmailDate
Transaction:??????#LastName
Transaction:??????#LastPersonalNoteDate
Transaction:??????#LastPersonalVisitDate
Transaction:??????#LifetimeValue
Transaction:??????#LinkedinLink
Transaction:??????#MailingName
Transaction:??????#MainAddress
Transaction:??????#MainCity
Transaction:??????#MainCountry
Transaction:??????#MainState
Transaction:??????#MainStreetAddress
Transaction:??????#MainStreetDirection
Transaction:??????#MainStreetName
Transaction:??????#MainStreetNumber
Transaction:??????#MainZipcode
Transaction:??????#NextAppointmentDate
Transaction:??????#NextAppointmentTime
Transaction:??????#Photo
Transaction:??????#PhotoUrl
Transaction:??????#PinterestLink
Transaction:??????#PostpoineContactDate
Transaction:??????#PreferredContactMethod
Transaction:??????#Prefix
Transaction:??????#Pronoun-AbsPos(his,hers,theirs)
Transaction:??????#Pronoun-Object(him,her,them)
Transaction:??????#Pronoun-Personal(he,she,they)
Transaction:??????#Pronoun-Possessive(his,her,their)
Transaction:??????#RealvolveEmailAddress
Transaction:??????#ReferredDate
Transaction:??????#ReferredToDate
Transaction:??????#RentOwn
Transaction:??????#RSSLink
Transaction:??????#SavvycardLink
Transaction:??????#Sex
Transaction:??????#ShowingReport
Transaction:??????#ShowingReport-NonSentOnly
Transaction:??????#ShowingReport-SentOnly
Transaction:??????#Source
Transaction:??????#SourceUrl
Transaction:??????#Stage
Transaction:??????#Suffix
Transaction:??????#Title
Transaction:??????#TwitterHandle
Transaction:??????#WorkAddress
Transaction:??????#WorkCity
Transaction:??????#WorkCountry
Transaction:??????#WorkEmail
Transaction:??????#WorkFax
Transaction:??????#WorkMap
Transaction:??????#WorkMobile
Transaction:??????#WorkPhone
Transaction:??????#WorkState
Transaction:??????#WorkStreetAddress
Transaction:??????#WorkStreetDirection
Transaction:??????#WorkStreetName
Transaction:??????#WorkStreetNumber

Transaction:??????#WorkWebsite
Transaction:??????#WorkZipcode
Transaction:??????#YearMove
Transaction:??????#YoutubeLink