A REALVOLVE HOW-TO | By Mark Stepp

Outline of Training Documents

Account Owner / Admin (Setup)

- **Setup Admin 01**: Account Settings
- **Setup Admin 02**: Users & Permissions
- **Setup Admin 03**: Login As Other Users
- **Setup Admin 04**: Tips, Tricks & Traps

All Users (Setup)

- **Setup User 01**: User Settings
- **Setup User 02**: Importing Contacts
- **Setup User 03**: Dotloop Integration
- **Setup User 04**: Auto Send Message
- **Setup User 05**: My Social Network
- **Setup User 06**: Google Sync
- **Setup User 07**: Importing Leads with Zapier.com

All Users (Basics)

- **Basics 01**: Adding Contacts
- **Basics 02**: Assigning Tags
- **Basics 03**: Searching the Database
- **Basics 04**: Filtering Contacts
- **Basics 05**: View All Contacts in a List
- **Basics 06**: Radar Tab
- **Basics 07**: Contact Connections
- **Basics 08**: Files Tab
- **Basics 09**: Calendar Tab
- **Basics 10**: Activities Tab

- **Basics 11**: Adding Properties (Listings)
- **Basics 11a**: Creating a Loop (Dotloop)
- **Basics 11b**: Seller Report Tab
- **Basics 12**: Adding Transactions (Closings)
- **Basics 13**: Commissions Tab
- **Basics 14**: Templates
- **Basics 14a**: Seller Report Template
- **Basics 15**: Signatures
- **Basics 16**: Workflows
- **Basics 17**: Example Workflow
- **Basics 18**: Building Your Own Workflows
- **Basics 19**: Activity Checklists
- **Basics 20**: Activity Actions without Checklists
- **Basics 21**: Activity Actions with Checklists
- **Basics 22**: Branching
- **Basics 23**: Starting a Workflow

All Users (Best Practices)

- **Best Practices 01**: Contact Type
- **Best Practices 02**: Stage
- **Best Practices 03**: Contact Status
- **Best Practices 04**: Category (A|B|C|D)

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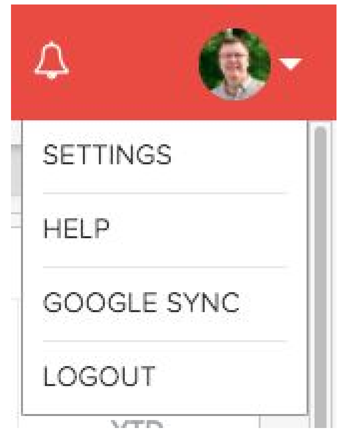
Account Settings

Account Owner / Admin

As the Account Owner / Admin of your realvolve account there are some important settings that need to be assigned. To access the Settings area of Realvolve, login to your realvolve account: http://login.realvolve.com and enter your login information. Click on the down arrow located in the upper right corner of the red header of the realvolve screen. (*Right of the User Avatar*). Click on **SETTINGS** from the dropdown menu to show the settings options on the left side of your screen.



1. Select the "**My Account**" option to enter your personal information. Be sure to fill in all the fields since they are used as merge fields in messaging templates which we will cover later. The Team Name, Service Area and In Business Since fields are only available to the Account Owner / Admin so be sure to fill them in. Press the **Update** button to save your information.

   Note: Along with entering your personal information, the "My Accounts" section can be used to change your password, The Plan and Billing Info section which allows you to see your subscription plan and make changes as needed, including Credit Card Details and previous billing transactions and the ability to Cancel your subscription.

2. Select "**Email**" to connect your IMAP/SMTP email account. There are several Email settings which can be ON/OFF including the following:
   a. **Auto Signature -** Automatically Add the default signature on outgoing emails.
   b. **Email Notifications for Start Workflow -** Receive an email notification when workflows are started on Contacts, Properties or Transactions from the server.
   c. **Email Notification for Incoming Email -** Receive an email notification in your personal account when receiving emails in your Realvolve account.

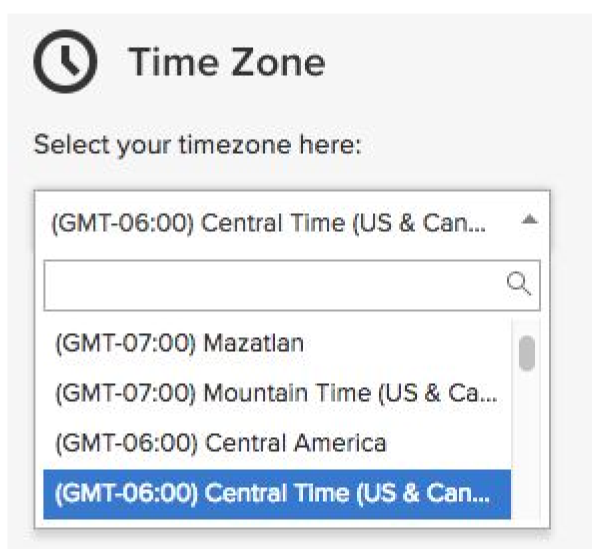
d. **Auto Send Message** - This is the **MASTER SWITCH** which allows outbound emails and SMS text messages to be sent automatically/immediately from workflow actions. Your messages **WILL NOT BE SENT** automatically if this setting is **OFF**
e. **Daily Email Reminders** - Receive daily email notification with Appointments, Todo's as well as reminders on import dates on Properties & Transactions.
f. **Sending Messages** - Automatically BCC personal email account when sending emails through your Realvolve email account. This allows a copy of Realvolve emails to be stored in your personal email account.

3. Select "**Automation**" to turn ON two important automation features available to your realvolve account. Use the following link for more details: http://go.realvolve.com/automation

4. Select "**SMS Services**" to choose a custom SMS number for sending text messages from inside Realvolve. Choose your country, enter your local area code then choose one of the available SMS numbers then click **Save**.

   Note: In order for Realvolve to send SMS messages you MUST select from the list of available SMS numbers. ***THIS WILL NOT BE THE SAME AS YOUR NORMAL MOBILE PHONE SMS NUMBER.***

   Once you have an assigned Realvolve SMS number you can select notification preferences to receive Emails and/or SMS notifications when you receive a Realvolve SMS Message. Realvolve uses the "Cell Phone" field in your My Account settings for notifications.



5. Select "**Time Zone**" to select your correct Time Zone.

   Note: *If you are in the Central Time Zone in the US or Canada be sure to "Central Time (US & Canada" and NOT "Central America"*

6. Select "**Boards**" to assign the name of each MLS Board that you are a membership in. If your board name is in the Master boards then select it and press **Save.** Otherwise, manually add the custom boards by entering State Name, Acronym, Board Name and Service Area then press **Save** to be listed at the bottom of the screen. An example for The Greater Springfield Board of Realtors in Springfield Missouri you would entered as follows:
   State: Missouri
   Acronym: GSBOR
   Board Name: Greater Springfield Board of Realtors
   Area: Southwest Missouri
   Boards Video: CLICK HERE

   Note: Currently, Realvolve **<u>DOES NOT</u>** connect directly to any MLS. However, we do allow you to assign multiple Company / MLS numbers to each Property Listing using this "Boards" setting.

7. Select "**Contact Source Type**" and assign the name of each source of contacts. Tracking where contacts originated from helps to drive future advertising and marketing decisions. Sources can be picked from the master list or create your own custom source. Once you have made your selections, press **Save** to add the source names to your master pick list.

8. Select "**User & Permissions**" to assign permissions. **THIS TOPIC WILL BE DISCUSSED IN THE NEXT LESSON.**

9. Select "**Set Default Fields**" to setup the default values for Property and Transaction fields. Realvolve maintains a large list of available party member types and dates. Go through the lists and place a checkmark on each party member and date type that is used in your geographic area on a regular basis.   You can leave less frequently used fields unchecked and add them as needed to the property or transaction.
   (SEE VIDEO)

   Party Member Video: CLICK HERE
   Date Type Video: CLICK HERE

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

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Questions?
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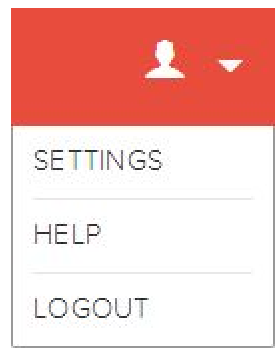
Users & Permissions

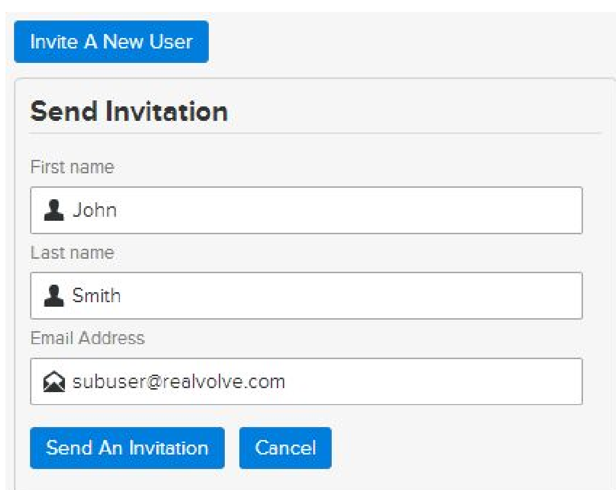
Account Owner / Admin

Today's training is mostly for those users that work with team members. It is important to setup the correct sub-user permissions before you start using your system. Realvolve has the ability to have multiple "sub-users" for each account. As the Administrator of your account, you can setup the sub-users as you see fit. Administrators have full access to all contacts, properties, transactions, workflows and templates for all sub-users. However, you may not want your sub-users to have full access to everything in your account so we allow you to edit permissions for each sub-user. To add sub-users to your account, go to the system menu in the upper right corner and click on the down arrow to show the drop down menu for **SETTINGS**.



In the Settings area on the left side, choose **Users & Permissions** then follow the steps below:

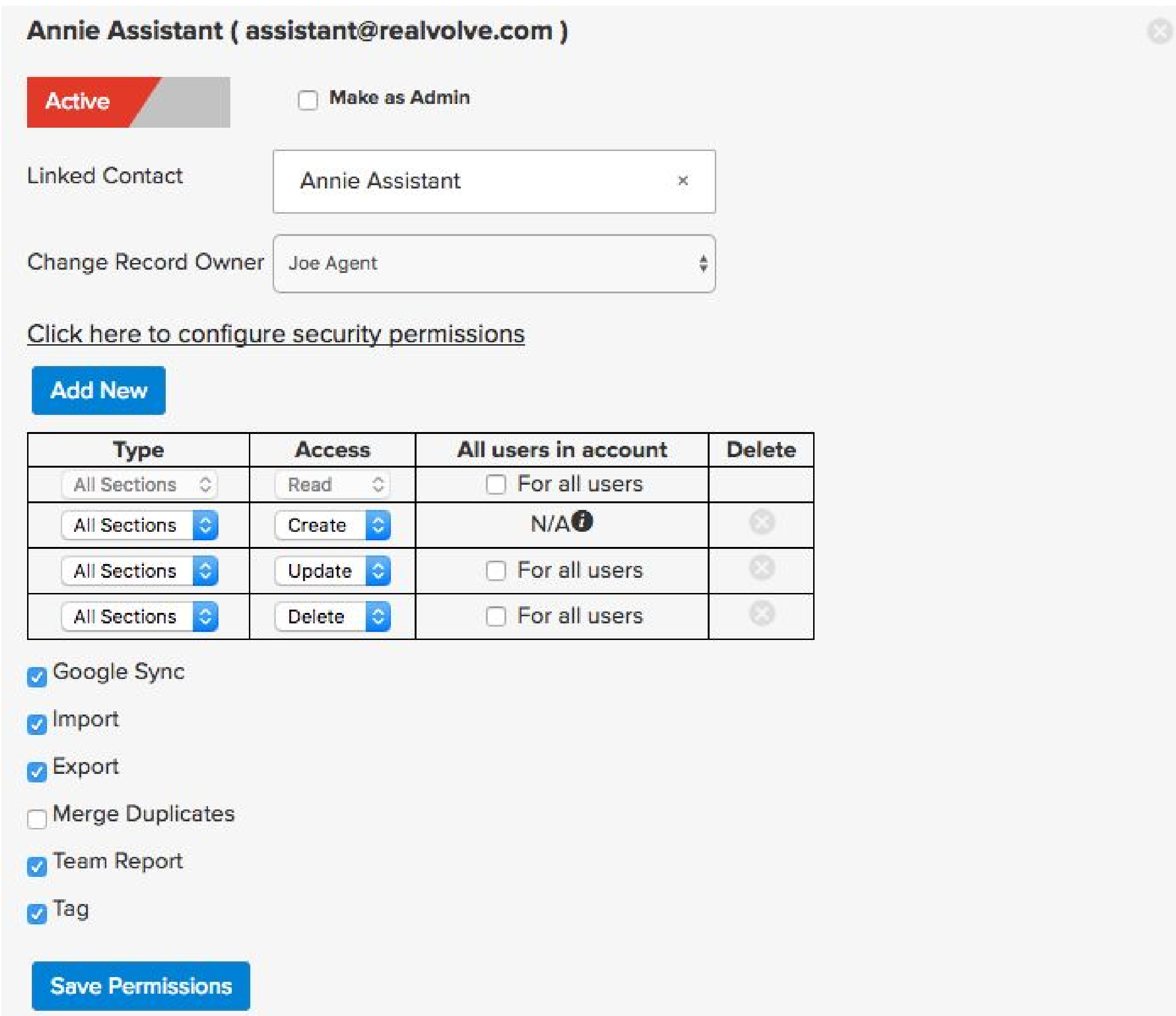
1. Click on the **Invite A New User** button to display the Send Invitation box.
2. Enter the **First Name**, **Last Name** and **Email Address** of the user to be added.
3. Press **Send An Invitation**.



NOTE: Repeat steps 1-3 for each sub-user you need added to your system.

Once the invitation has been sent, have the sub-user check their email and follow the link to finish the setup process. It will allow them to assign their own password for accessing the system in the future using their own email address and the password they supply.

By Default all sub-users have very basic access - they can READ, CREATE, UPDATE and DELETE their own records in the database. To allow the sub-user to have more rights, simply locate the sub-user's name in the Users & Permissions section and click on the "**Click here to configure security permissions**" link.



If this user needs access to VIEW all data in all sections for all users then simply place a check in the "For all users" access checkbox in the READ access row. If this user also needs the ability to update data of other users then do the same for the UPDATE access row. Finally if the user also needs the ability to delete data then place the check in the DELETE access row. Some users may need to be able to see records but not update or delete while other users need full access to everything.

You will notice that the first column says "**All Sections**" - you can leave the "For all users" checkboxes blank and only give the user full access to specific sections like "**Contact**", "**Property**", "**Transaction**", "**Workflow**", "**Template**", "**Tasks**" which is calendar, "**Documents**", "**Notes**". To do this click on the "Add New" button above the table and the system will add a new row to the table... Select the section you want the sub-user to have access to and then the specific access right "Read","Create","Update","Delete" and if desired for all users or not using the "For all users"

Example: You have an assistant that comes in part time to work on workflows and helps your other agents with workflows. You don't want her to see, edit or delete any contacts, properties, etc that are not her own so you leave the "For all users" blank for the "All Sections" then do the following:

1. Click on "**Add New**" , choose Type: "**Workflow**", Access: "**Read**", **check** "For all users"
2. Click on "**Add New**" , choose Type: "**Workflow**", Access: "**Create**", **check** "For all users"
3. Click on "**Add New**" , choose Type: "**Workflow**", Access: "**Update**", **check** "For all users"
4. Click on "**Save Permissions**" to save the changes to the table.

Now the sub-user will have the rights to Read, Create, Update workflows for all users but will not have the right to delete their workflows.

NOTE: One key point when dealing with sub-users and rights to Properties and Transactions. If you do not give your sub-users rights to your properties and transactions but need them to have access to specific addresses then simply assign an Activity to the sub-user connected to that property. This will automatically give the sub-user access to the address since they were granted privileges to the activity.

Additional rights for **Google Sync**, **Import** and **Export, Merge Duplicates, Team Reporting and Tags** have to be given individually, simply use the check the boxes which are needed.

Users & Permissions Video: CLICK HERE

- Google Sync - Allow this user to sync with Google. Only those contacts which are owned by the user will sync.
- Import - Allow this user to import contacts from a CSV file or Twitter Account.
- Export - Allow this user to export contacts to a CSV file.

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

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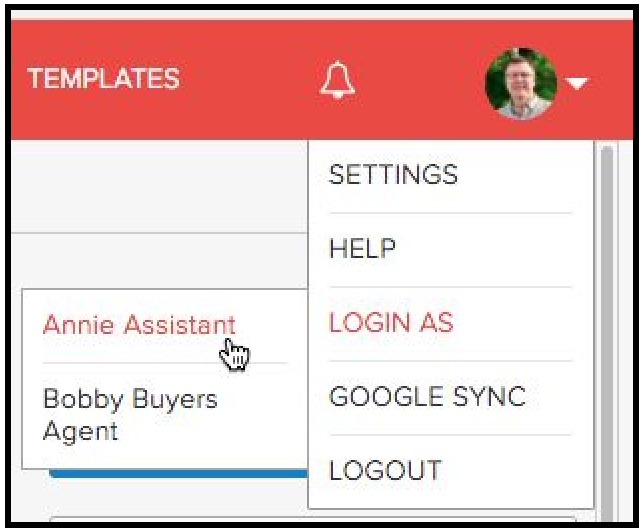
Login As

Account Owner / Admin

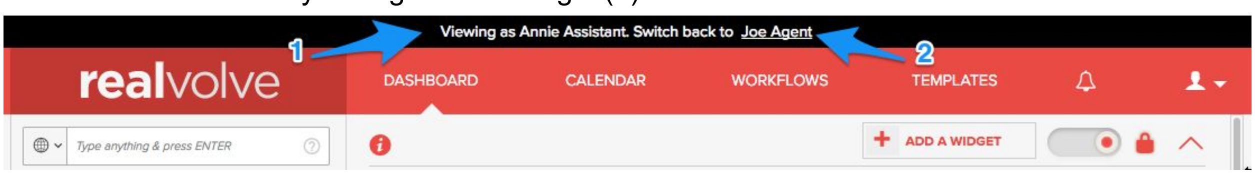
Account owners and Administrators have the ability to login as other users quickly.

(SEE VIDEO)

Click on the dropdown menu in the upper right corner and choose “LOGIN AS” to display the list of available users in your account



Once you are logged in as that user you will see a black bar identifying the user’s name (1) and a link to switch back to your login normal login (2)



If you want to switch between users simply click the menu > “LOGIN AS” again and select another user.

When you are ready to switch to your normal login simply click the link at the top of the screen

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Tips, Tricks & Traps

Account Owner / Admin

Review the items below to see common Tips, Trips & Traps of setting up your realvolve account.

Tips:

- **Users & Permissions:**
  - Export: Select this option if you want to allow the sub-user to export to CSV.
  - Tag: Select this option to allow this sub-user to **CREATE** new tags. Leave this option UNCHECKED if you only want the sub-user to use existing tags.
- **IDX Broker**: Automatically import Property Listings from an IDXBroker.com account.
- **Referral URL**: Give this URL to other users that you refer to Realvolve to get credit for the referral.
- **Integrations**:
  - BombBomb API Key: Assign the BombBomb API to Record / Select / Send videos from inside Realvolve.
  - Utility API Key: 3rd Party API integration providers will need this key to use our API to import contacts from other sources.
- **Trash**: Any Contact, Property, Transaction, Document, Attachment, Workflow or Template that is deleted will moved into the trash. This gives you a chance to restore deleted data or permanently delete when needed.
- **SMS -** In a workflow, send first SMS that tells contact that this SMS number is used for “Status Updates” and is not your normal SMS Number.
- **Settings > My Account:**
  - “Cell Phone” used to get SMS Notifications
  - “Team Name” used in several workflow library templates for your entire team
  - “In Business Since” used to calculate the number of years for the “[[**YearsInBusiness**]]” merge field.

- **Importing**: When Importing CSV files that you may use more than once be sure to give a “Mapping name” to allow it to be selected at a later time.
- **Browser Notifications:** Turn them “ON” to receive notifications even when Realvolve is not running.
- Places to find **Help**
    - http://Help.Realvolve.com
    - https://www.youtube.com/c/RealvolveTraining/Videos
    - http://go.Realvolve.com
    - support@realvolve.com
    - Footer of Realvolve
        - Live Chat Support
        - Submit a Support Ticket
        - Help
    - How do I… - Step-by-Step Walkthroughs

Tricks:

- **Change Record Owner**: Reassign the record owner to newly added data with the selected user. This is useful when Assistants do all the data entry for another user.
- **Set Default Fields**:
    - Calendar (Start Time):
- **Settings > Integrations > Zapier API Key**: Use Zapier.com to incorporate hundreds of integrations with other applications. This is a powerful automation tool to receive or send data to other applications.
- **Boards**: Add Franchise/Company names to the Boards to assign custom Listing ID’s
- **Record Owner Assignments**: to assign Round Robin or Multiple Record Owners when using Zapier to import contacts.
- **Import**: When importing click on the [**Skip Remaining Fields**] at the bottom to pre-assign “Primary Contact” as “RECORD TYPE” to all columns.

Traps:

- **Merge Duplicates**: CAUTION: The Merge Wizard should only be used to merge ALL contacts in the database - this WILL merge ALL USER's contacts which match the merge key and CAN NOT BE UNDONE!
- **Linked Contact**: All users MUST have a "linked contact" in the contact database. This is important for tracking volume and commissions on Seller's Agents and Buyer's Agents of users.   The Contact record that is placed in the Seller's Agent or Buyer's Agent fields of the "People" tab determine which user's get the commission and volume data shown on the dashboard. If there is NO link then the dashboard numbers will be inaccurate.
- **Time Zone**:
    - Verify that if you are in the Central Time Zone in the United States that you select "(GMT-06:00) Central Time (US & Canada)" and **NOT** "(GMT-06:00) Central America" which does not observe Daylight Savings Time.
- **Filters**:
    - Filters are retained when you leave a screen so if you turn a filter "**ON**" to limit the number of Notes & Correspondence, Contacts, Properties, Transactions, Activities, Workflows or Templates then returning to that screen will only show the records that meet the filter.   If you think you are missing records, turn "**OFF**" any filters in that area.

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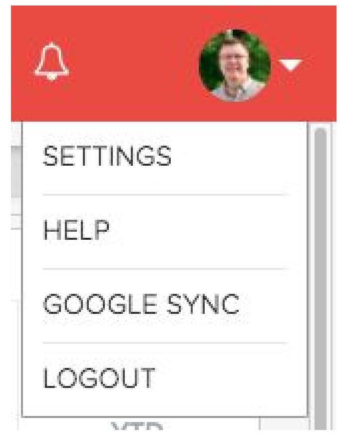
User Settings

User Setup: All Users

As a user of the realvolve account there are several important settings that need to be assigned. Some of the settings are dependant on the security settings set by your administrator/account owner, if an option listed below is not available then consult with your administrator/account owner to discuss your options. To access the Settings of Realvolve, login to your realvolve account: http://login.realvolve.com and enter your login information. Click on the down arrow located in the upper right corner of the red header of the realvolve screen. (*Right of the User Avatar*). Click on **SETTINGS** from the drop-down menu to show the settings options on the left side of your screen.



1. Select the "**My Account**" option to enter your personal information. <u>Be sure to fill in all the fields in this screen since they are used as merge fields in messaging templates which we will cover later.</u>

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f. **Sending Messages** - Automatically BCC personal email account when sending emails through your Realvolve email account. This allows a copy of Realvolve emails to be stored in your personal email account.

3. Select "**SMS Services**" to choose a custom SMS number for sending text messages from inside Realvolve. Choose your country, enter your local area code then choose one of the available SMS numbers then click **Save**.
   Note: In order for Realvolve to send SMS messages you <u>MUST</u> select from the list of available SMS numbers. ***THIS WILL NOT BE THE SAME AS YOUR NORMAL MOBILE PHONE SMS NUMBER.***
   Once you have an assigned Realvolve SMS number you can select notification preferences to receive Emails and/or SMS notifications when you receive a Realvolve SMS Message. Realvolve uses the "Cell Phone" field in your My Account settings for notifications.

4. Select "**Time Zone**" to select your correct Time Zone.

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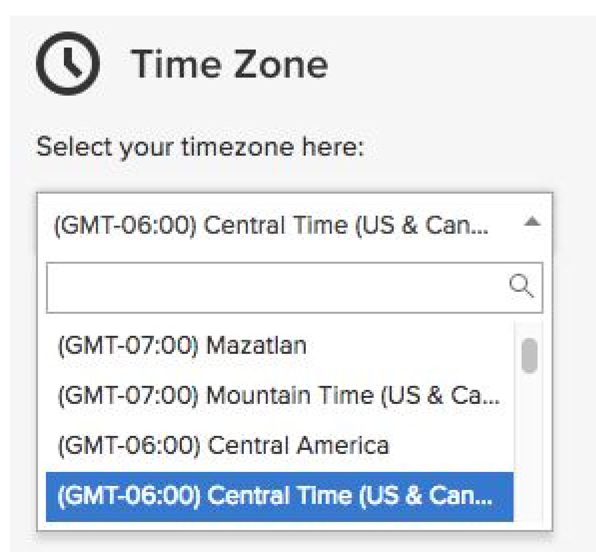

5. Select "**Set Default Fields**" to setup the default starting time for the calendar view.

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Importing Contacts

User Setup: All Users

Realvolve has the ability to import contacts from a standard ".csv" (Comma Separated Values) file. Almost every database and spreadsheet system has the ability to export or save to a ".csv" file which is the standard method for exchanging data. I recommend that you check the documentation of your current system to explain how to "Export" to a ".csv" file. Once you have the file saved to your computer, you can follow the steps below to upload and map the fields to successfully import your data into Realvolve.

1. Login to Realvolve.
2. At the top right corner of your screen, click on the user menu and choose **Settings**.
3. On the left side of the screen, choose **Import Contacts**.
4. Go to the section labeled **CSV Import** and click the **Choose File** button.
5. Select the **.csv** file that you exported from your previous system and click **Open**.
6. Next, click on **Upload**.
7. Once the file is uploaded check the **Choose Existing Mappings** for a predefined mapping of your previous system: #Advantage Xi(shared), #iCloud(shared) , #Insightly(shared), #IXACT Contact(shared), #Outlook(shared), #RealtyJuggler(shared), #Top Producer(shared), #Wise Agent(shared).
8. (If your .csv format is not available then begin mapping the fields as needed)
9. If you create your own mapping or make changes to an existing mapping, I recommend that you save your changes before importing so that you can re-import later if needed.
10. Click **Import** to begin the process

Use the link for step-by-step instructions: (SEE VIDEO)

Visit http://help.realvolve.com for information on specific imports like Top Producer, Advantage Xi, Wise Agent and others.

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

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Dotloop Integration

User Setup: All Users

What is Dotloop?

Dotloop is an online workspace that connects everyone and everything needed to complete a real estate transaction in one place. Dotloop allows you and your agent to edit, complete, sign and share documents without ever needing to print, fax or email.

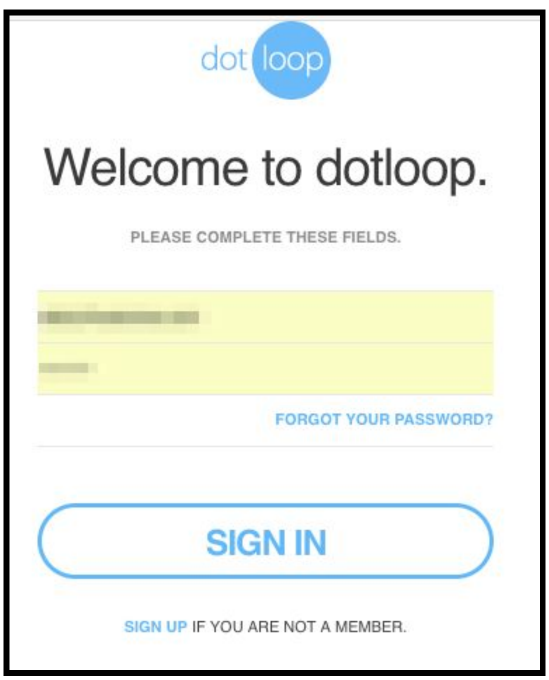
Benefits of Integrating Realvolve with Dotloop:

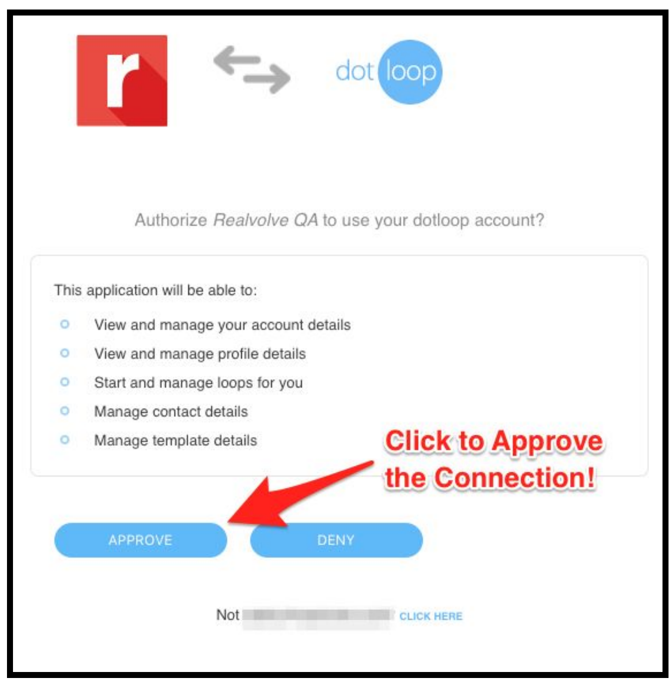
The Integration between Realvolve and Dotloop reduces data entry by creating loops from the realvolve property and transaction screens and transferring common fields as well as syncing party members from the people tab. The integration is capable of creating new loops or connecting properties and transactions to existing loops when needed. Users can also select loop templates during the loop creation process.

[Click Here to See Video]

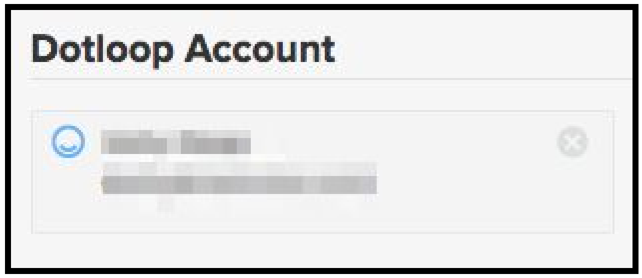
How to connect your Dotloop Account:

To connect your Dotloop account go to SETTINGS > INTEGRATIONS, scroll down the list of available integrations to the section labeled "Dotloop Account". Click on the [**Add Dotloop Account**] button to display the welcome screen and sign in to your Dotloop account. Click the [**APPROVE**] button to approve the Dotloop integration.





Once approved the Dotloop account information will be displayed in the integrations area.

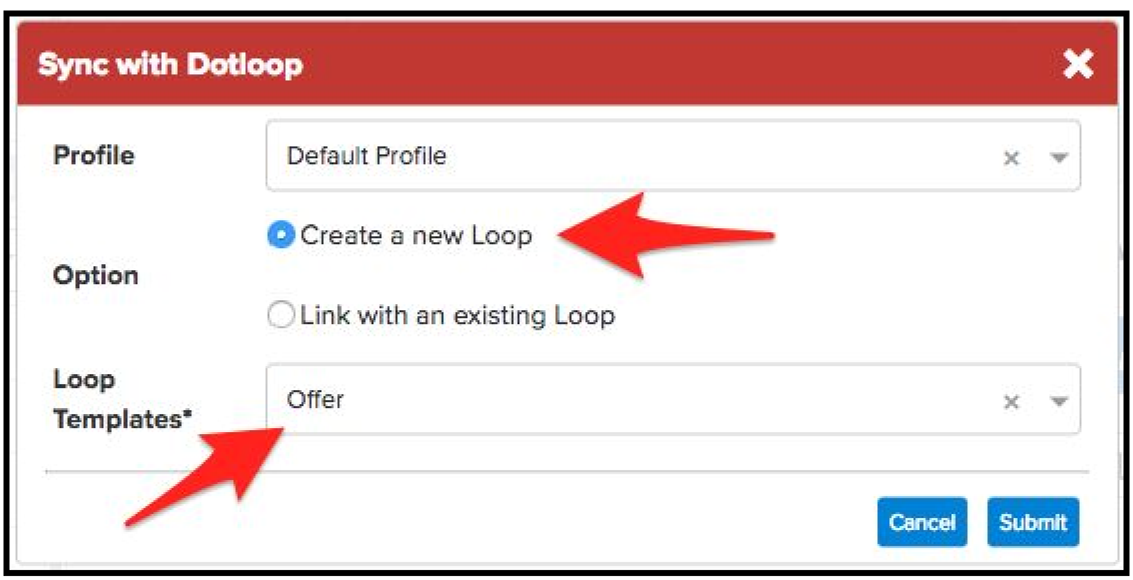


To disconnect the account click on the (x) button to the right of the Dotloop user name and email.

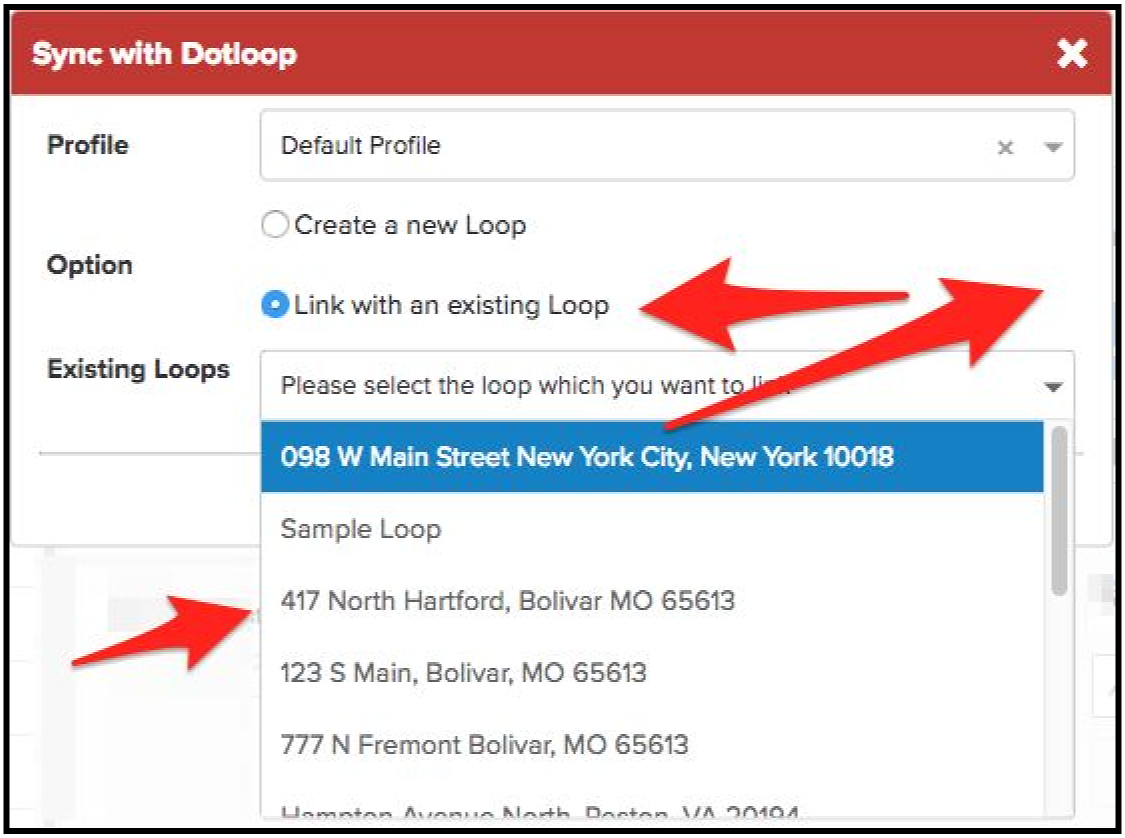
How does the integration work?

Click on the Dotloop icon in the upper right corner of the property record.

Realvolve will display a popup window to collect some basic information to proceed. Select the profile (if there are multiple profiles available) Remember that only one loop can be connected to a Realvolve property so choose the correct profile as needed. Then select **Create a new Loop** to start a new loop from the realvolve property and select a Loop Template when needed.

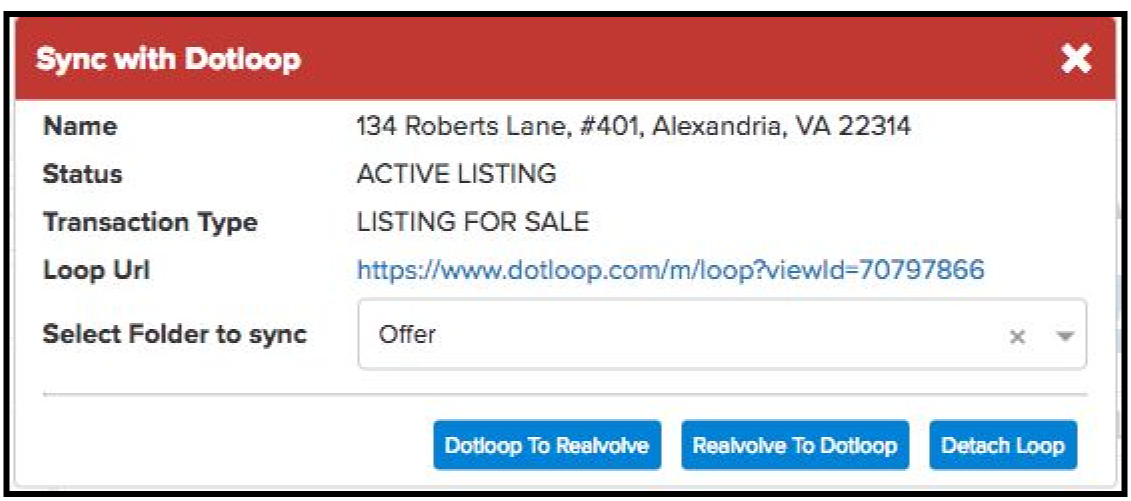


Select **Link with an existing Loop** if a loop for this property already exists and you want to connect to it.



After choosing **Create a new loop** or **Link to an existing loop**, realvolve will begin the process of making the integration connections. This process can take a few minutes so be patient.

After creating a loop from a Property (Listing) the system will show the following information when the Dotloop icon is pressed. The Name / Address, Status, Transaction Type as well as the loop URL and folder to sync.



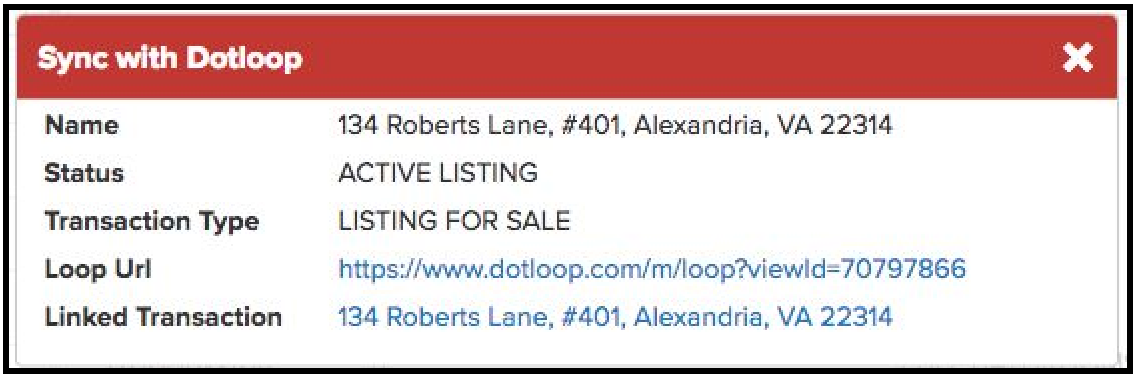
Click on the Loop URL link to open a new tab with this loop

Choose the Dotloop folder to sync with the Realvolve files tab of the property.

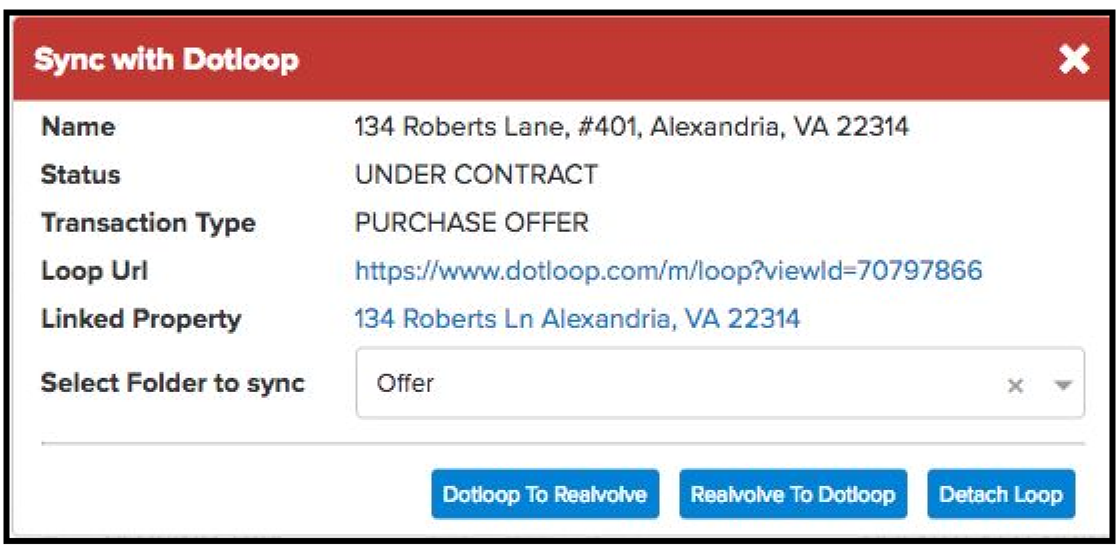
Decide which direction you want to sync the data… **Dotloop to Realvolve** will sync all data in Dotloop into Realvolve. **Realvolve to Dotloop** will sync all data in Realvolve into Dotloop.

If you need to disconnect a loop from a property or transaction then click on [**Detach Loop**]

If a transaction is started from a property then the Dotloop link is transferred to the transaction and syncing can not be initiated from the property and must be done in the transaction. Clicking on the Dotloop icon from the property will show basic information but the buttons will not be available.



Clicking on the Dotloop icon from the transaction in this case will show the following popup with syncing buttons. When a property is connected to a realvolve transaction, the transaction is the authority and all syncing is done from the associated transaction and NOT the property. Any property information that is in Dotloop will be sync'd back to the linked property of the Realvolve transaction.



Known Limitations

- If an email address of a contact is removed from Realvolve, On running a **Realvolve to Dotloop** sync - it is not removed from Dotloop.   If we now run a **Dotloop to Realvolve** sync the email address will be populated back into the home email field of Realvolve.
- The user is not allowed to connect a new Dotloop account if they have already tried connecting a Dotloop account which is connected by another user.
- In Realvolve, a party member must have a first and last name. Dotloop will not add the contact if they do not have a first and last name when the Realvolve to Dotloop sync is performed.
- When a synced Transaction is deleted and restored back in Realvolve, andthe home email address of a party-member is updated. A duplicate participant in Dotloop is created for the role which was updated.

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

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A REALVOLVE HOW-TO | By Mark Stepp

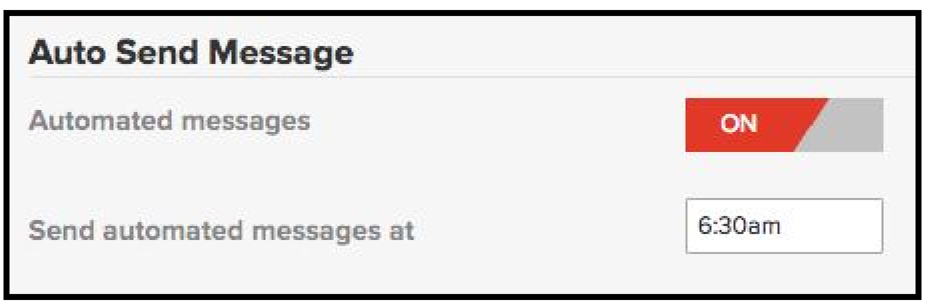
Auto Send Message: Email / SMS

Basics: All Users

Once you have made it through the creating Workflows, Checklists, Actions, Branching, and Starting the Workflow, your calendar will begin filling up quickly with important activities. As that happens, you can easily get overwhelmed with menial tasks like sending email and SMS messages. The best practice is to assign those tasks to be send automatically in order to spend less time "working your database". You will learn more about automating actions in **Basics 20: Activity Actions without Checklists** but it is important to understand that assigning activities to send automatically isn't enough, you have to make sure Realvolve has the automation turned **ON**, otherwise they won't go out.

To turn on automated messages go to **SETTINGS** > **EMAILS**

Make sure that the "**Automated messages**" option is in the **ON** position and that you have assigned a time of day to process messages that are not assigned specific send times. This is your "**Master Switch**" which allows automated emails and sms messages to be sent on your behalf.



Tasks having actions which send automatically without an assigned time will wait until the specified time before sending each day. The example above will automatically send messages at 6:30am each day.

Any activity in your calendar with an assigned date and time will process that message at the specified time within a 10 minute window.

Automation Rules:

There are some **RULES** that must be followed for automated messages:

1. The Activity MUST NOT have Checklists **-** If an activity uses a checklist, the checklist must be completed before the message can be sent (excluding incomplete checklists actions)

2. The Activity MUST HAVE ONLY 1 Action **-** If an activity has more than one action then the user must select which action to run.

3. The Activity MUST HAVE the send a message option set to "Send Automatically" or "Send Immediately" in the Action.

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

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A REALVOLVE HOW-TO | By Mark Stepp

My Social Network

User Setup: All Users

NOTE: This section is getting moved into the "Integrations" section of Settings Soon… If "My Social Network" is not an available choice then look in "Integrations"

To setup integrations between Realvolve and your social networks like Evernote, Google and Twitter click on the System Menu in the upper right corner and choose **Settings** > **My Social Network**. This section allows you to connect each of your social network accounts to Realvolve. Click on the button for each section to grant access to the social network item.

- Evernote - SEE VIDEO.
- Google - SEE VIDEO.
- Twitter - SEE VIDEO.

Note: For important information on doing Google Sync visit document "**Setup User 06: Google Sync**" for some VERY IMPORTANT information otherwise it could cause major delays in your setup process.

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

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

A REALVOLVE HOW-TO | By Mark Stepp

Google Sync

User Setup: All Users

PLEASE READ THROUGH ALL STEPS BELOW BEFORE DOING ANY OF THEM

What is Google Sync?

Google sync is the process of synchronizing Contacts, Calendar, and Tasks between Realvolve and Google. You can setup the system to sync just contacts, just calendar or both. Once the setup process is complete, any common information that you enter into Realvolve will Sync to Google immediately. Since most smart phones can sync with Google, your Realvolve contacts and calendar items will show on your phone for easy access. If you make changes to your contacts from your phone or from Google, it may take a couple hours for the changes to show up in Realvolve unless you use the SYNC NOW buttons in the Google sync settings.

The one thing that you should know is that the Google sync process does NOT sync ALL fields in Realvolve to Google. It can only sync the common fields that exist in Google Contacts like Names, Addresses, Phone Numbers, Groups (Tags), Notes, Birthdays and the Basic Calendar and Task items. There are many more fields in Realvolve than Google so only those fields in Google will be synchronized.

Watch the Google Sync Webinar for more detail: (SEE VIDEO)

How to setup Google sync:

The first step of the process should have already been completed in the **User Setup 05: My Social Network**: **Settings** > **My Social Networks** > Connect your Google Account (SEE VIDEO)

Now that the Google Account is linked to Realvolve, the sync features must be turned on. Before we do that I want to explain some basic concepts of the Google system.

- Some phones only sync the contacts located in the "**My Contacts**" group of Google. If that is the case for your phone, it will be important to assign contacts to the "My Contacts" group so that the contact shows up on your phone.
- In Realvolve, the TAG: "**System Group: My Contacts**" is the same as Google's "**My Contacts**"
- Syncing "**System Group: My Contacts"** (Default) Will sync only those contacts in the "My Contacts" group of Google it will skip contacts in the "Other Contacts" group.

- Syncing "**All Contacts**" (*NOT RECOMMENDED*) will Sync **ALL** Google Contacts <u>including</u> those contacts in Google's "**Other Contacts**" group. The **Other Contacts** group contains phone numbers of people that called you but details on those contacts could be missing along with those contacts that do not have any group assigned to them. Many Realvolve users prefer to NOT sync the contacts in the "Other Contacts" group so limiting the sync by the "System Group: My Contacts" can be beneficial (see details below).
- **IMPORTANT**: If you delete contacts or activities in Realvolve, Google Sync will automatically delete them in Google. If you have synchronized Realvolve with Google, don't make the mistake of thinking that you can redo the sync by removing all names from Realvolve to bring them back in from Google. Deleting names from Realvolve will remove the contacts from Google and they will no longer exist.

  There is a procedure for redoing a sync, <u>please check with support before making this mistake</u>.

(PLEASE READ THROUGH <u>ALL</u> <u>STEPS</u> BELOW <u>BEFORE</u> DOING ANY OF THEM)

SYNCING CONTACTS:

1. If you have already imported contacts from <u>another source</u> into realvolve and those same names **already exist** in Google then it may be easier to clear out all names in Google first and then sync all the names in Realvolve back to Google. If the names in Google do not match exactly then this is not a good option.
2. Go to **Settings** > **Google Sync**
3. Place a checkmark in the "**Check the box if you want to sync Contacts between Google and Realvolve**" option.
4. **VERY IMPORTANT**: There is a selection box containing the value "**System Group: My Contacts**" in the Contacts section. This indicates which contacts will be synchronized between Google and Realvolve. Some users want everything to be synchronized, while others only want contacts from a specific Tag/Group. Most users only want to sync to Google's "**My Contacts**", in that case you should select "**System Group: My Contacts**" from the drop down list to prevent the "**Other Contacts**" group in Google from syncing into Realvolve.

   There is an option for "**All Contacts**" but in most cases you **<u>DO NOT WANT</u>** this option because it contains your "My Contacts" names and the names in the "**Other Contacts**" group which most users do not want.

   You have the option to choose what gets synchronized and it is best to decide before you sync them all. You may have many thousands of contacts in your database but only want a few hundred of your closest contacts to be synced. An easy way of doing this is to set up a tag like

"**My Google Contacts**" or "**Google Sync**", you can make up your own tag name and assign it to each contact that you want sync'd. Click on the "**System Group: My Contacts**" button and select the Group/Tag that you want to sync.

NOTE: It's **<u>much</u>** easier to deal with limiting the synced contacts beforehand than having clean-up afterward.

5. Press the [**Sync Now**] button to sync the Contacts for the first time.
6. After Syncing the first time, you may find duplicate contacts in your database. This is caused by having existing contacts in the Realvolve database prior to syncing. You have the option to delete any duplicate contacts or merging contacts manually or automatically. While Automatic merging is faster, you run the risk of merge 2 contacts with the same name unintentionally. I recommend that you use the manual merge to verify that the correct duplicates are merged into one record. (SEE VIDEO)

SYNCING CALENDAR:

1. Place a checkmark in the "**Check the box if you want to sync Activities between Google and Realvolve**" option.
2. Select the starting date of activities that you want to sync with Realvolve. This will prevent any extremely OLD calendar dates from Google from syncing into Realvolve.
3. Press the [**Sync Now**] button to sync the Calendar for the first time.
4. **NOTE**: After the sync is complete, you may have several activities in Realvolve that do not have a "Completed" date assigned and you are being reminded to complete them. This is because Google does not maintain a "Completed Date" to indicate when an activity has been done. In this event you can select a date in the "Set all activities as completed prior to date" then press the [**Set Completed**] button. This will remove these older activities from the notification system of Realvolve.

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

A REALVOLVE HOW-TO | By Mark Stepp

Importing Leads with Zapier.com

User Setup: All Users

One of the powerful features of Realvolve is it's integration with Zapier.com to import contacts from many different sources and immediately start a workflow. The following resources help explain some of the options available.

- How to import leads from Zillow (SEE VIDEO)
- How to import leads from Realtor.com (SEE HELP)
- How to import leads using Email Parser (SEE HELP)
- How to import contacts using Google Forms (SEE HELP)

Note: In addition to bringing contacts into Realvolve, Zaps can "SEND" data to other sources as seen in the following video which we call "Reverse Zaps" (SEE VIDEO)

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

Questions?

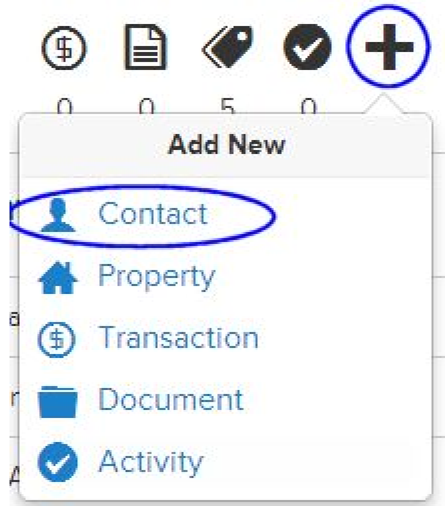
Please direct questions and comments to support@realvolve.com.

A REALVOLVE HOW-TO | By Mark Stepp

Adding Contacts

Basics: All Users

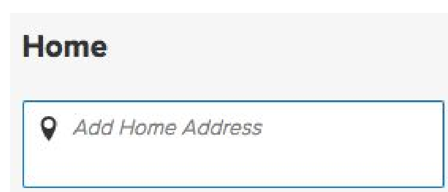
The left side of the screen is called the **List View** because it contains lists of data. There are 7 icons representing the primary sections of the Realvolve system: **Contacts**, **Properties**, **Transactions**, **Documents**, **Tags**, **Activities** and the (**+**) Plus Sign for adding new data.

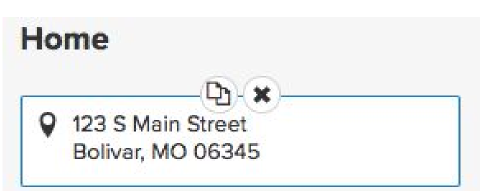


To add a new contact, click on the (**+**) sign in the list view, then click on **Contact**. Do the same thing when adding Properties, Transactions, Documents or Activities to the Calendar. This will display the Contact tab of a new contact record in the database. At the top of the screen click into the "FIRST NAME" field and enter the contact's first name. Press the [**TAB**] key to move to the next field and enter the contact's last name in the "LAST NAME" field. Holding down the [**SHIFT**]+[**TAB**] key will move backwards through the list of fields.

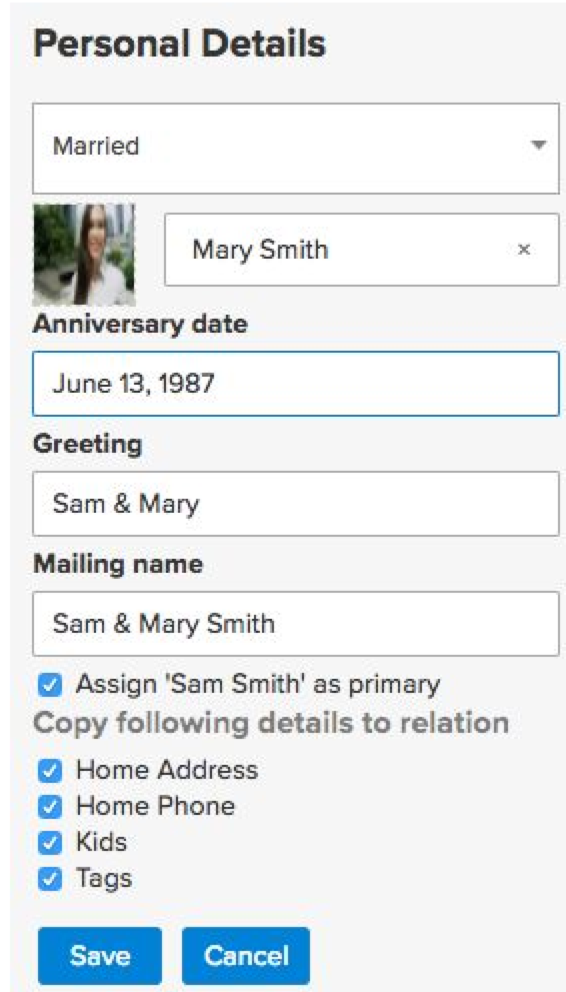
TIP: Notice the small icon on the right of the last name: Click on this icon to copy the "dropbox" email address to your clipboard. This is a special email address given to each contact, property, and transaction so that emails received by this address are automatically connected to the record and any attachments to the email are automatically extracted to the Files tab.

The **Contact** tab stores the Home, Work, and Additional information like Address, Mobile Phone, Regular Phone, Fax, Email and Website. Click into the “Add Home Address” field to display the "**Address Details**" showing each part of the address field as separate fields to make data entry more accurate. You only need to enter the street address and zip code. The system will do the rest of the work for you by looking up the City, State, County, and Country where possible. Press the **Save** button to put the full address into the single address field. Repeat the same process for the Work address or the additional address field as needed.





The right side of the screen is the **Personal Details section.** Click on the (**+**) plus sign to the right of Relationship status to connect the spouse or significant other. Choose the relationship type and then Enter the name of the contact. If they are in the database already, you can select the contact or you can just press TAB to leave the field and it will automatically add the contact's name into a new contact record and link the two contacts. Enter the Anniversary date when known. The **Greeting** and **Mailing name** fields are used when sending letters and labels to the joint records. Greeting would be "**Sam & Mary**" where the Mailing name will be "**Sam & Mary Smith**". The option to make the current contact the primary will change the order in which those fields are displayed. Below the input fields for this section is a set of check boxes to keep Home Address, Home Phone, Kids, and Tags the same for both contacts, select those as desired. Once the relationship information has been entered, press the **Save** button to complete the process. SEE VIDEO



Enter a **Birth Date** into the system. Realvolve will automatically add a reminder to the calendar. It is treated as a repeating activity so you will be reminded each year.
Home Purchase Anniversary and **Home Sale Anniversary** fields are available to track additional dates for properties that can be used as “milestone dates” for workflows.

Kids names can be entered one-at a-time and then press TAB or ENTER to enter the next name. When you enter a name and you have a connected relationship contact that has the kids names set to copy, then both contacts will show the list of names.

In the **Source Details** section you can keep track of referral information BY and TO other contacts as well as Source of this contact. Knowing source type is important! By keeping track of which sources produced the best results, you will be sure not to waste precious marketing dollars. To link another contact to this contact as a referral connection, simply type the name of the contact and select them from the list. They are instantly connected for reporting later.

The **Details** section allows you to keep track of communication and contact details. This includes Last Call Date, Last Email Date, Last Personal Visit, and Last Personal Note. We can use these dates for scheduling regular monthly, quarterly, or yearly connections. The Postpone Contact Date prevents contacts from displaying in notifications until the specified date. Additional data fields are available to track other details of the contact.

Three important fields in the details area:
Contact Type: Client, Agent, Farm, Personal, Vendor, Prospect, and Hidden *(Hidden contacts are buyer or seller party members of a transaction which are represented by another real estate agent)*.
Stage: Aware, Know, Like, and Trust.
Contact Status: Suspect, Prospect, Lead, Client, and Past Client.

Note: *Assigning Contact Type, Stage and Status determines proper communication and notifications on the dashboard.*

Automation designed by Realvolve can be activated to seamlessly and systematically advance your Contacts from one stage or status to the next. You can activate this feature in Settings >> Automation, and turn on Field Automation. To learn more, check out **http://go.realvolve.com/automation**

Video Training: CLICK HERE

TIP: *Record Type* is either ***Person*** or ***Company***. When selected as Person, the system will normally show the Home information when displaying this contact in a list or as a party member to a transaction. If it is set to Company, then the Work Address is displayed.

The **Active Contact** status is used to prevent the contact from getting printed, exported or emailed when set to **No**. If you find that a contact is not being contacted you should check this setting and make sure the value is set to **Yes**.

Entering **Connections** is important for keeping up with your contact's social media feeds. The information in the feeds are displayed in the Radar tab of the contact and allows you to get quick information before calling your contact.

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

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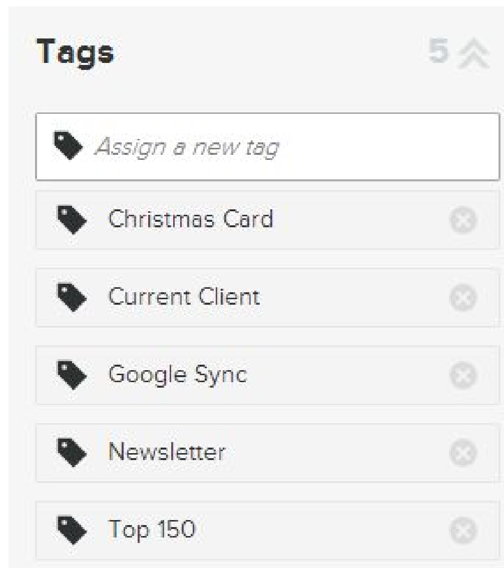
A REALVOLVE HOW-TO | By Mark Stepp

Assigning Tags

Basics: All Users

A Tag is nothing more than a **Label** or **Classification** that allows you to segment your contacts into different groups. Each contact in your database can have an number of tags. Assign each contact that you send a monthly newsletter to the "**Newsletter**" tag or assign specific job related tags like "**Agent**", "**Plumber**", "**Lender**", or "**Appraiser**" in order to quickly find a "**Plumber**" in your area. Most agents will assign tags like "**Current Buyer**," "**Current Seller**," "**Past Buyer**," or "**Past Seller**" to quickly view lists of people you are working with or have worked with. One unique feature of realvolve is the ability to automate the tag assignments in workflow actions to indicate the current status of a contact, property or transaction. An example would be to automate the tag assignment as your client moves through the sales process of "**Suspect**," "**Prospect**," "**Lead**," "**Client**," and "**Past Client**."

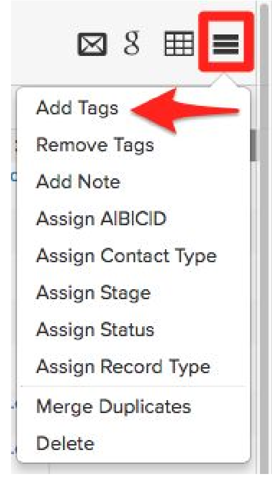


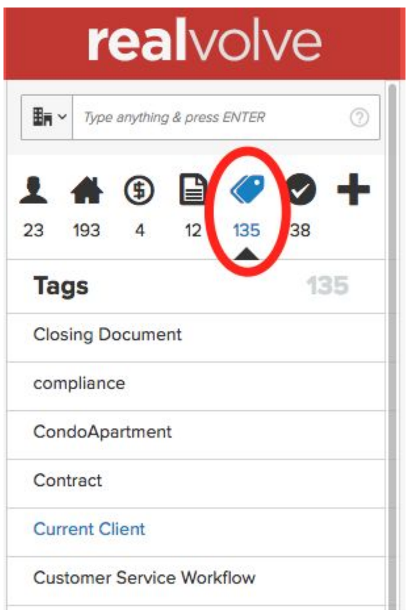
To view or assign tags to a contact, click on the **Radar** tab and scroll down to the lower right. Here you will see the Tags area which shows the number of tags assigned to the contact as well as the full list. To add a tag to a contact, simply click into the "Assign a new tag" box and start typing the tag name. If the tag already exists, you will see it display in a list under the entry area and you can pick it. If it is a new tag then press TAB or ENTER to apply that tag to the contact and it will be added to the list of available tags for the next time.

Use the button next to any tag to remove it from the contact.

Assigning tags individually as you enter new contacts is important but can be time consuming when adding tags to several contacts that have already been entered.

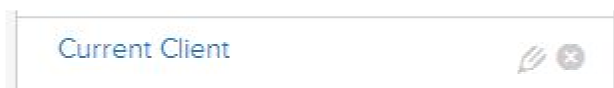
TIP: To speed up that process, you can use the "Add Tag" menu in "More Menu" of the **View All** screen . If you click on the double chevron " **>>** " next to the Contact count, Realvolve will show all the contacts from the list view in more detail. This includes Name, Company, Address, Phones, and Emails in a table format. Each name in the list has a box to the left that can be used to select that contact for processing in some way. Above the table of names in the upper right corner is a “More Menu” which looks like 3 horizontal lines. Click on the menu and choose **Add Tags** to add tags to each selected contact in the list. This allows you to quickly mark several names and apply the tag with less effort than doing them one by one in the radar tab.





To quickly view a full list of contacts by a specific tag, you can click on the **Tags** list view. This will display all records in the work pane that contain a specific tag. While it has limitations, if offers quick access to names with very little effort. Using the "Search for anything..." box to find keywords can also limit the number of tags displayed in the list view.

Each tag in the list can be edited or deleted as needed. Simply move the mouse over the tag to display the edit and delete icons and select as needed.



The pencil icon allows you to edit the tag name and the ⊗ icon allows you to delete that tag. (SEE VIDEO)   If you have more than one tag with a similar name you can combine them “Newsletter” and “newsletter”. Edit the tag named “newsletter” (lower ‘n’) by clicking on the pencil icon and retype the name to “Newsletter” (capital ‘N’) and call contacts that are tagged with “newsletter” will be combined with the contacts that have “Newsletter”.

Your job for today is to continue entering names into the database and begin the process of assigning tags to those contacts.

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

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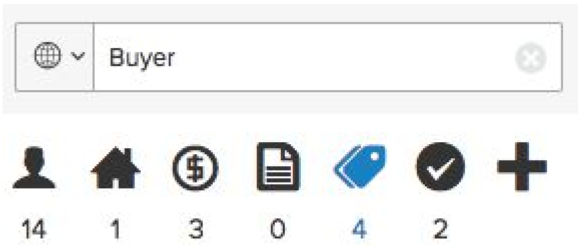
Questions?

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

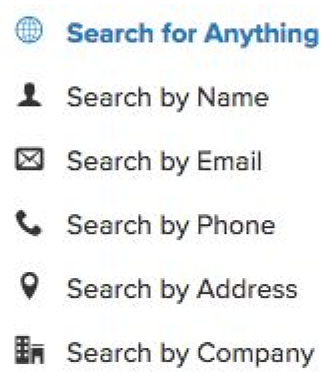
Searching the Database

Basics: All Users

The large box at the top left of the screen with grey text saying *"Type anything & press ENTER"* allows you to search for any text in the 6 sections of the system.



The example to the left shows the word "**Buyer**" and Realvolve found **14** Contacts, **1** Properties, **3** Transaction, **0** Documents, **4** Tags and **2** Activities containing the word "Buyer". When you click on any of the icons, it will show the list of items that was found in that section. Clicking on the button on the right side of the search field will clear the search text and display all the data in each section. On the left side of the Search field is a dropdown selection for choosing where to search in the database.



Search for Anything: "Search for Anything" will search the entire database for the search term. This type of search is the slowest of the available options.

Search by Name: Searches the First/Last name field in Contacts as well as the People tab of a listing or transaction.

Search by Email: Searches the Email Address field in Contacts as well as the People tab of a listing or transaction.

Search by Phone, Address and Company all search their associated fields.

Special Search Characters:

- Use the Asterisk ***** character, (also known as **star**), as a wildcard to search in the middle of words.
- Example: ***son** would find records containing **son** like **Son**ya, John**son**, or per**son**al.
- Use the question mark **?** character as a placeholder for an unknown character.
  - Example:
    - **S?n** would find any records where the field begins with **S**, has one unknown *second character* then the letter **n**. This would return records beginning with **S**a**n**, **S**e**n**, **S**o**n** or any number of other results.

        - It is also possible to use multiple question marks like **M??k** will find Mark, Mick or any other word where there are 2 characters between an **'M'** and a **'k'**.
- Use the Asterisk ***** and Question Mark **?** in combination if needed.
- Example: **Jo*s?n** would search for any name that starts with '**Jo'**, has any number of characters to up an '**s'**, some unknown character then the letter '**s'**... returning contacts like **Johnson**, **Johnsen**, **Johansson** **Jonson**.

How to Filter Contacts: SEE VIDEO

Additional Help Documents: (Click HERE)

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

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Questions?

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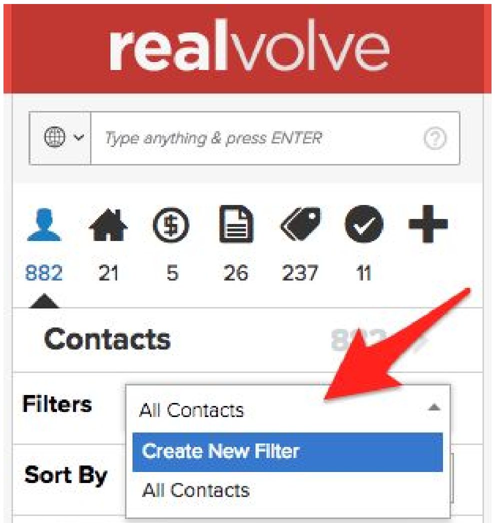
A REALVOLVE HOW-TO | By Mark Stepp

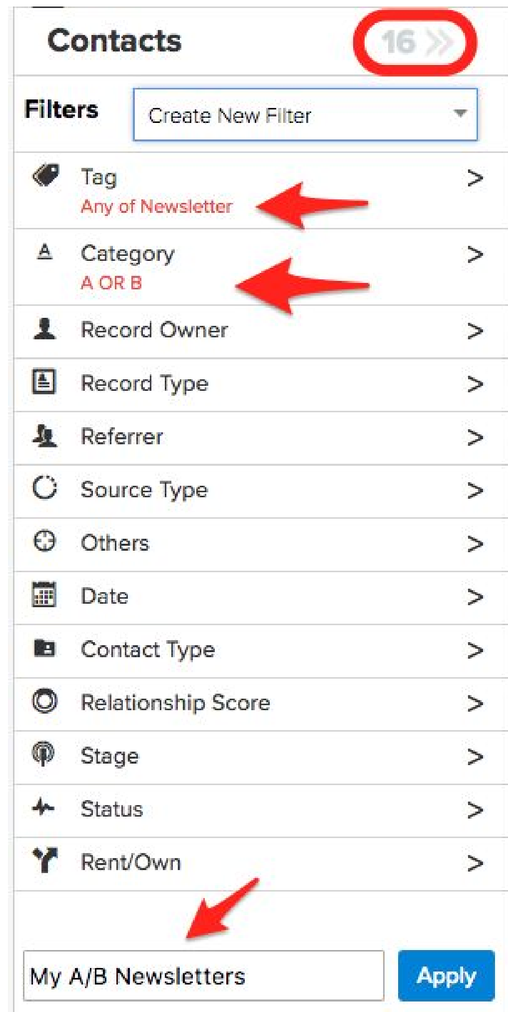
Filtering Contacts

Basics: All Users

On the left side of the screen, just below the section title "**Contacts**" is the Filters section. The drop-down menu of the filter allows filters to be created or use previously created filters to limit which contact records are viewed. Select "**Create New Filter**" to access the filter options from the drop-down menu such as Tag, Category, Record Owner, Record Type, Referrer, Source Type, Others, Date, Contact Type, Relationship Score, Stage, Status, and Rent/Own. Any combination of filters can be selected and saved for future use.



The selected criteria is displayed in RED below the filter type and the count of records matching the filter criteria is shown above the drop-down menu. Click on the ">>" chevrons to view the filtered records. Enter a filter name then click [Apply] to save the filter criteria for future use.



Filter Types

- **Tags** - Any / All / No - Use the options located at the top of the popup list to search for contacts that have "**Any**" combination of the selected tags, "**All**" the selected tags must be assigned, or "**No**" where the only contacts shown are ones that don't have the selected tags. The "Any" option is usually represented with the word "or", where contacts can have "Tag1" **or** "Tag2" **or** Tag3". As long as a contact has any of the three selected tags, it will be displayed in the list. The "All" option is like the word "and", where contacts have to have "Tag1" **and** "Tag2" in order to qualify.

- **Category** - [A|B|C|D] - This filter allows you to search for contacts with any category combination of A,B,C or D
- **Record Owner** - View just those contacts that are owned by the selected users.
- **Record Type** - View just Person or Company contacts.
- **Referrer** - Enter a contact name using this filter to display all contacts in the database that was referred by this person.
- **Source Type** - View contacts that came from specific sources.
- **Others** - Used to find contacts that are missing information in Email, Address and Tags.
- **Date** - Search by Birth date, Anniversary, Last Call, Last Visit or Last Note
- **Contact Type** - Search by the types Client, Agent, Farm, Personal, or Vendor, Prospect or Hidden
- **Relationship Score** - Select the relationship score range to view
- **Stage** - Filter by the stages of Aware, Know, Like, or Trust
- **Status** - Filter by the statuses Suspect, Prospect, Lead, Client, or Past Client
- **Rent/Own** - Filter by Rent or Own

How to Filter Contacts: SEE VIDEO

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

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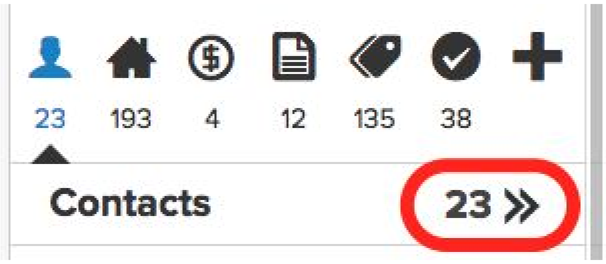
A REALVOLVE HOW-TO | By Mark Stepp

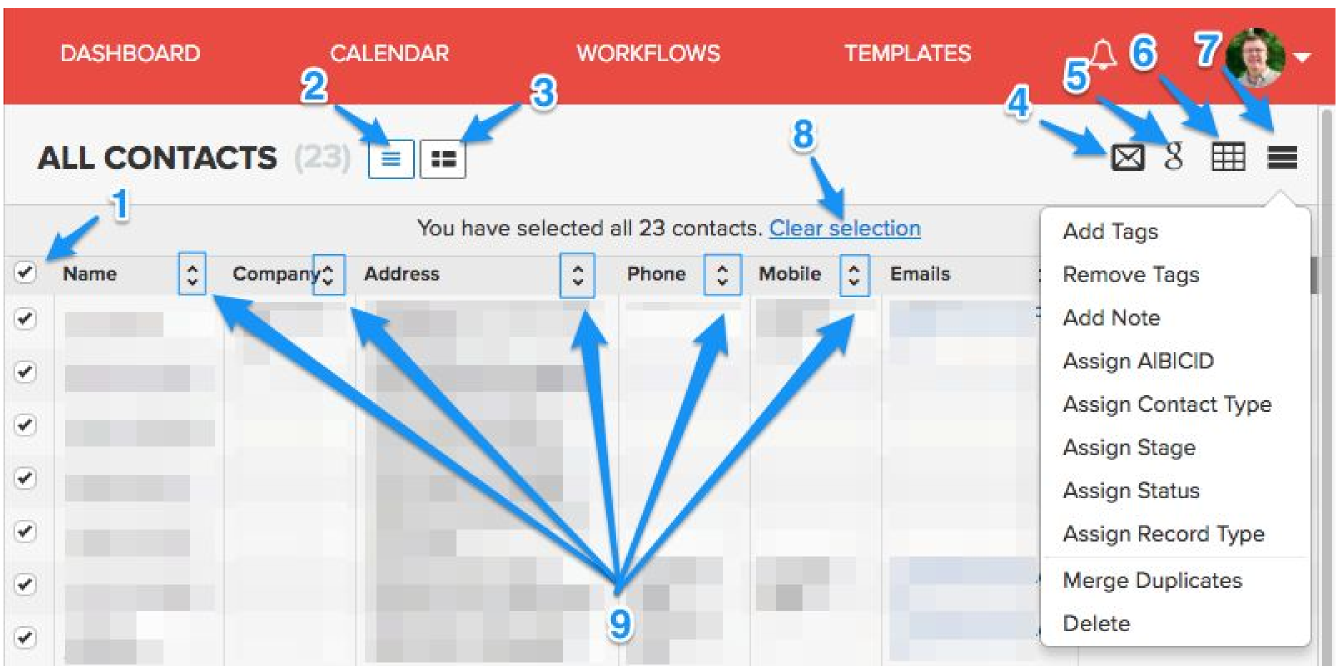
View All Contacts in a List

Basics: All Users



From the Listview on the left side of the screen, click on the double chevron " **>>** " next to the Contact count to display a list of contacts.

The image below shows the top section of the View All work pane, I've numbered each element to make it easier to describe. Use the “more menu” (7) on the far right to perform a process on multiple contacts at one time.



1. **Select Records** - This check box selects those records that are loaded into the current view. The table of contacts only displays a limited number of records at a time to increase load speed in low bandwidth areas.
2. **Table View** - List of contacts in table format of columns and rows.
3. **Grid View** - Lists contacts in a grid format which include an Image and the A|B|C|D category.
4. **Send Email** - Send an email to the selected contacts.
5. **Send to Google** - Sends the selected contacts to your Google drive as a spreadsheet. (must have a Google account setup in Settings > My Social Network.

6. **Export to CSV** - Exports the selected contacts to a Comma Separated Values file.
7. **Three horizontal line Icon -** Select any number of Contacts and this icon and a drop-down menu will appear giving you the following choices:
    - **Add Tags** - Adds a tag or tags to each selected contact.
    - **Remove Tags** - Removes a tag or tags from each selected contact.
    - **Add Note -** Adds a note to each selected contact.
    - **Assign A|B|C|D** - These are categories
    - **Assign contact Type -** One of the following: Client, Agent, Farm, Personal, or Vendor.
    - **Assign Stage -** One of the following: Aware, Know, Like, and Trust
    - **Assign Status -** One of the following: Prospect, Suspect, Lead, Client, Past Client, or None
    - **Assign Record Type** - Person or Company
    - **Merge Duplicates** - When 2 or more records are selected which are the same contact this button allows you to merge the data into one record to eliminate duplicates.
    - **Delete** - Deletes each selected contact and puts them in the trash. (**Settings** > **Trash**)
8. **Clear selection** (link) **-** de-selects all the selected contacts in the list.
9. **Column Sorting -** Allows for sorting in ascending or descending order. The first click will sort that column in ascending order (A-Z), a second click will change to descending order (Z-A)

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

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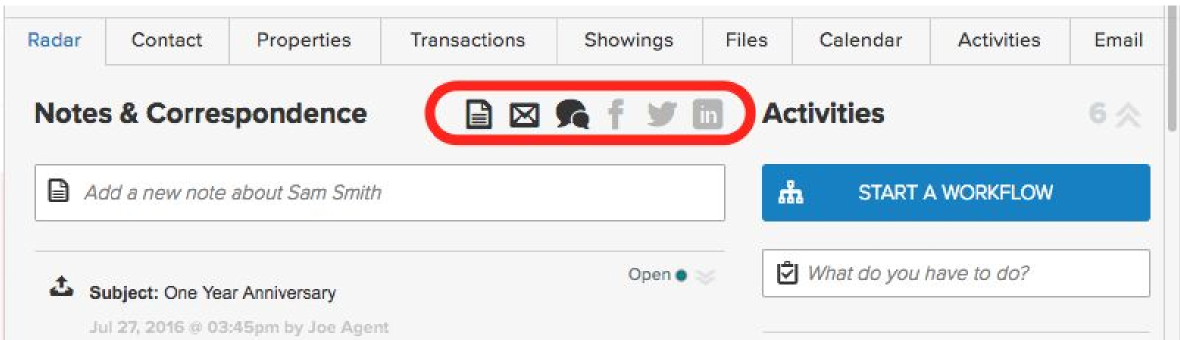
Questions?
Please direct questions and comments to support@realvolve.com.

Radar Tab

Basics: All Users

The **Radar** tab shows streams of information about the Contact including Notes, Emails, SMS Text messages, Facebook, Twitter, and LinkedIn feeds. The icons are either ON (**Dark**) or OFF (Light Gray). To limit which streams are shown in the radar tab simply click on the icon to make the icon dark to turn on that filter. In the example below I have the first 3 stream filters **ON** which are Notes, Emails and SMS Texts. The Facebook, Twitter and LinkedIn icons are light gray and turned OFF so they will not show in the radar tab.



Radar Filters:

- **Notes** - All notes entered by a user into this contact.
- **Emails** - Any email sent to the contact email address or received into the dropbox email address.
- **SMS Text** - Text messages sent to this contact.
- **Facebook** - All Facebook feeds from this contact.
- **Twitter** - Tweets by this contact.
- **LinkedIn** - Messages from this contact.

Note: *If you do not see notes in a contact record and you know that there were notes available, you may have the notes filter OFF and other filters ON which is preventing the notes from displaying. Try clicking on notes icon and see if they reappear.*

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

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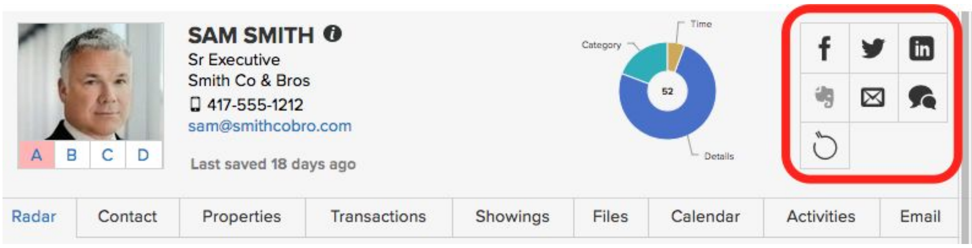
A REALVOLVE HOW-TO | By Mark Stepp

Contact Connections

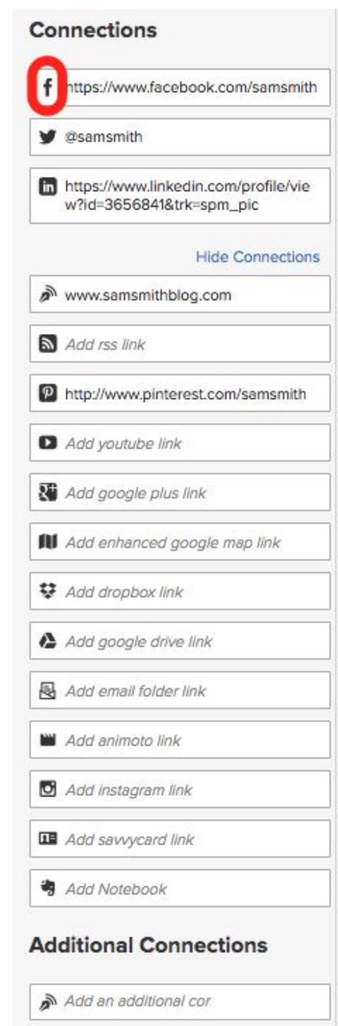
Basics: All Users

The upper right corner of each contact has a series of icons which allow you to communicate with your contact through different social media networks/integrations. If the Social Network connections are setup and the Connection field for that social network has been entered, then the icon will be in dark gray indicating that you can use that method of communication. Click on the dark gray icon to send messages through Facebook, Twitter, LinkedIn, Email, BombBomb, and SMS Texts. The Elephant icon is for connecting an Evernote notebook to a Realvolve contact. When you set up an evernote notebook connection, the URL for that notebook will be saved in the Evernote field under the Connections section for that contact.



Note: Only one Evernote notebook can be connected to a contact at a time.

To visit the social media website for the contact, click on the connection **icon** located in the Contact tab. The example to the right shows where to click when visiting the contact's Facebook page. Each icon in the Connections section will take you to the associated website indicated.



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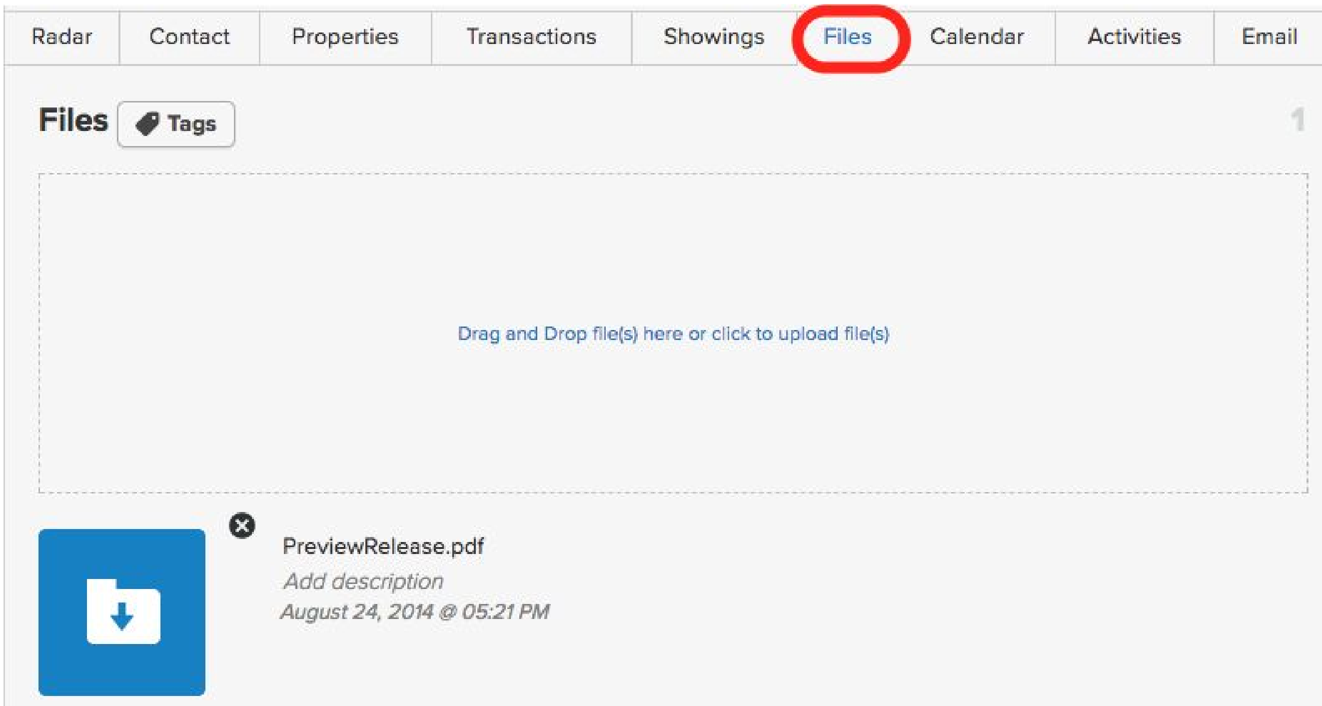
A REALVOLVE HOW-TO | By Mark Stepp

Files Tab

Basics: All Users

The "**Files**" tab stores image files, documents, spreadsheets, and powerpoint presentations which are associated with the contact. “Drag and drop” into the marked area or click the same location to display the file selection screen to attach the files. Each file can be classified with a tag as it is loaded by selecting the tag before hand. Click on the **Tags** button to choose a filter tag to be displayed and uploaded in the files area. Choose the Tags option of **All** will view all files.



Once the file or files have been loaded, you can click on the File name to change it if needed or add a more detailed description of the file. Clicking on the blue icon to the left of the file allows that file to be opened and viewed in a new browser window or tab. Clicking on the ⊗ icon removes the selected file from the assigned contact.

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

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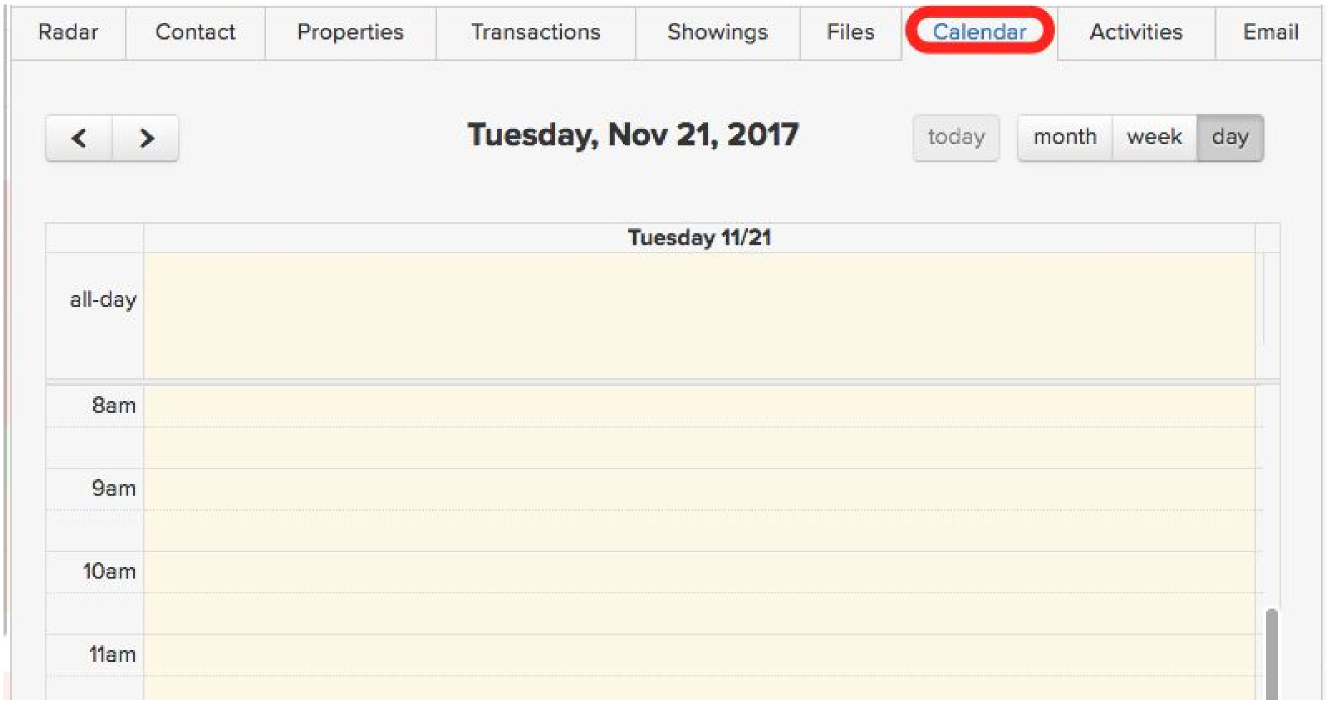
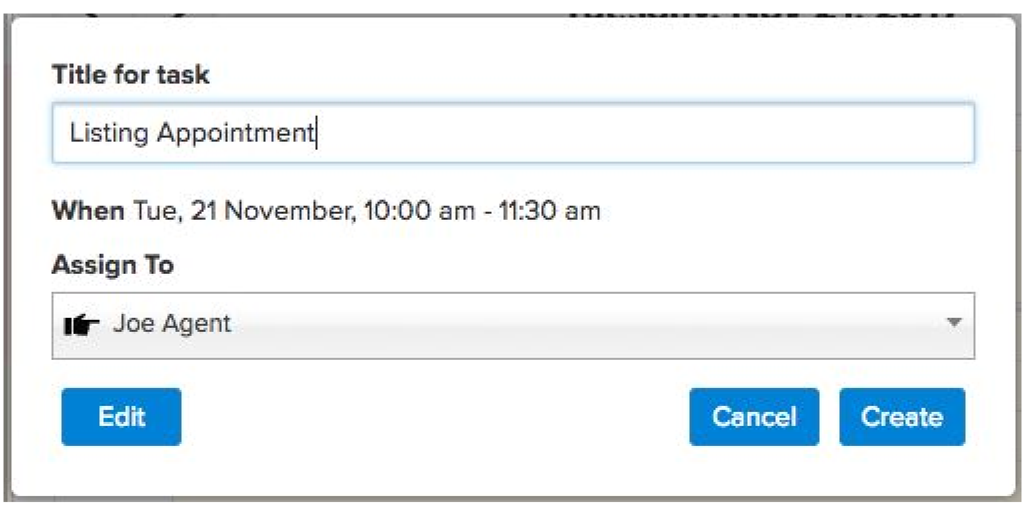
Calendar Tab

Basics: All Users

The **Calendar** tab is similar to the main Calendar located at the top of the screen except the appointments shown in the tab only apply to the selected contact. Use the left/right arrows on the left side of the calendar to move between dates. The Month, Week and Day buttons change the view of the calendar as needed.

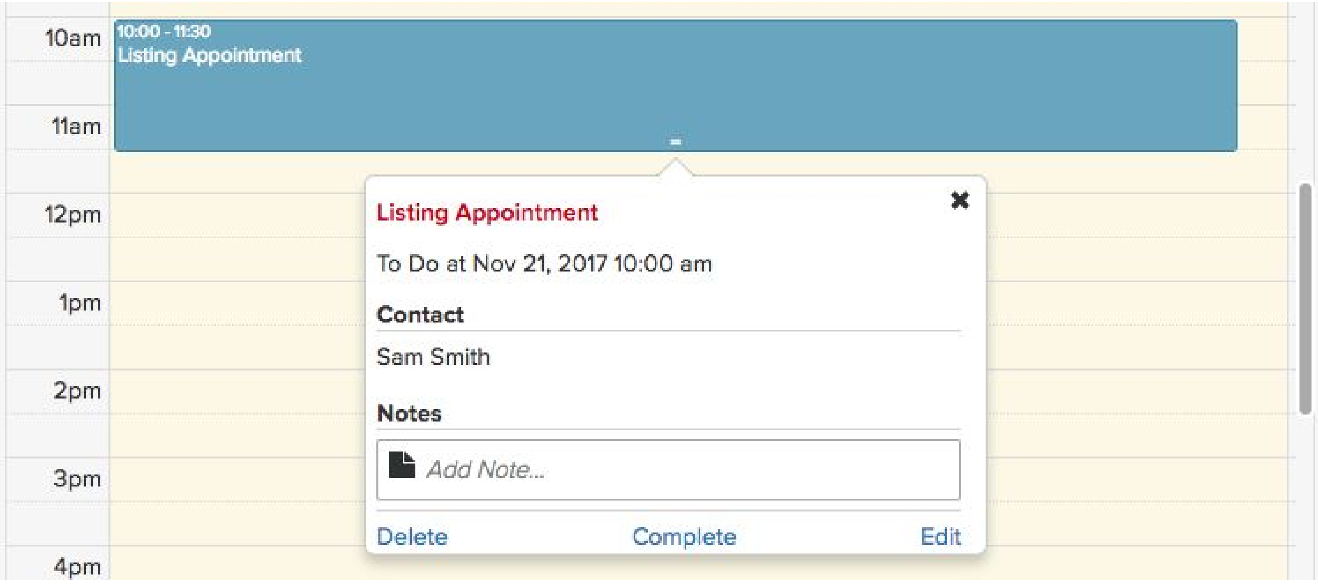


When viewing the Day or Week view, you can click and drag a specific time range to add an appointment to the contact. By selecting the time range between 9am and 10:30am will show the popup window shown below. Enter the Title of the task and modify the Assign To option as needed to assign the appointment to the correct user of your system.



Once the information about the appointment has been entered correctly, press the **Create** button to add it to the calendar

.



Clicking on the activity in the calendar displays a popup menu to Delete, Complete or Edit. Additionally, notes can be entered for the activity prior to completing the activity. It is important that you choose the "Complete" option, once the activity has been completed so that Realvolve removes it from your daily task list. Any activity not completed will continue to show on your daily task list until it is either completed or deleted. This insures that everything on your schedule gets done and and important events are not missed.

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

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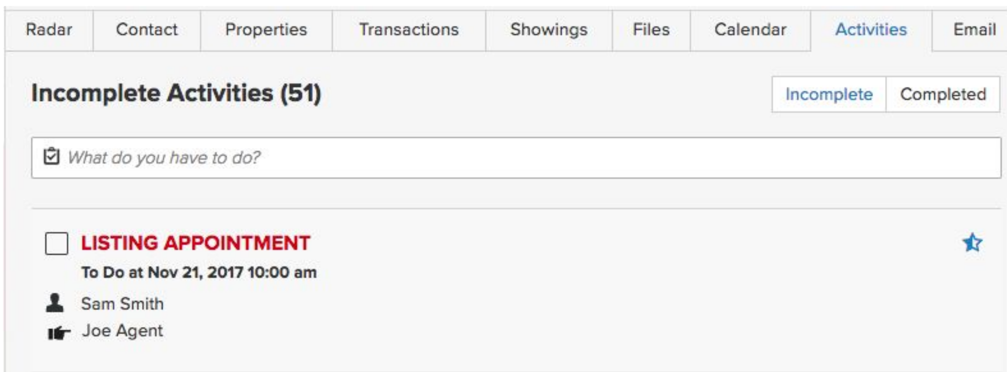
A REALVOLVE HOW-TO | By Mark Stepp

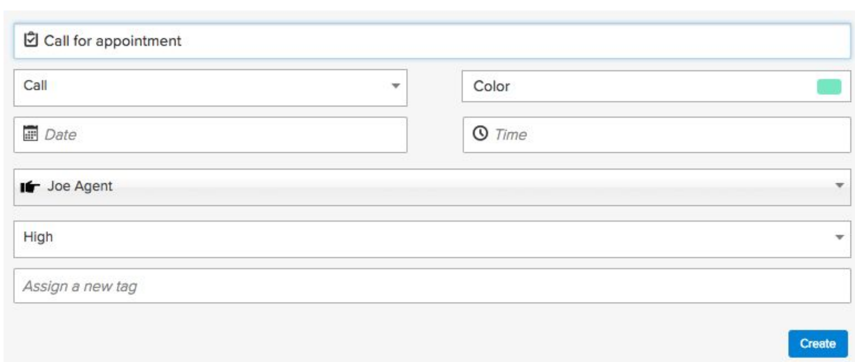
Activities Tab

Basics: All Users

The **Activities** tab is similar to the Calendar tab. It shows the activities and tasks in a list format based on its due date. Activities that are due or past due will show when "**Incompleted**" is selected, completed activities display when "**Completed**" is clicked. In the example below, you can see the **Listing Appointment** that was previously added calendar training. Click in the Square box to the left of the Activity title to mark the activity as completed to have it move into the Completed section.



To add an activity in this area, simply click in the box labeled "***What do you have to do?***" This will open up an area to enter information for a new Activity.



Enter the information needed for the activity and then click the **Create** button to add it to the system. Activities can be added with or without dates/times. Non-dated items are considered TASKS and automatically synchronized to Google as Tasks if you have Google Sync turned on.

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

Questions?
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A REALVOLVE HOW-TO | By Mark Stepp

Creating a Loop (Dotloop)

Basics: All Users

What is Dotloop?

Dotloop is an online workspace that connects everyone and everything needed to complete a real estate transaction in one place. Dotloop allows you and your agent to edit, complete, sign and share documents without ever needing to print, fax or email.

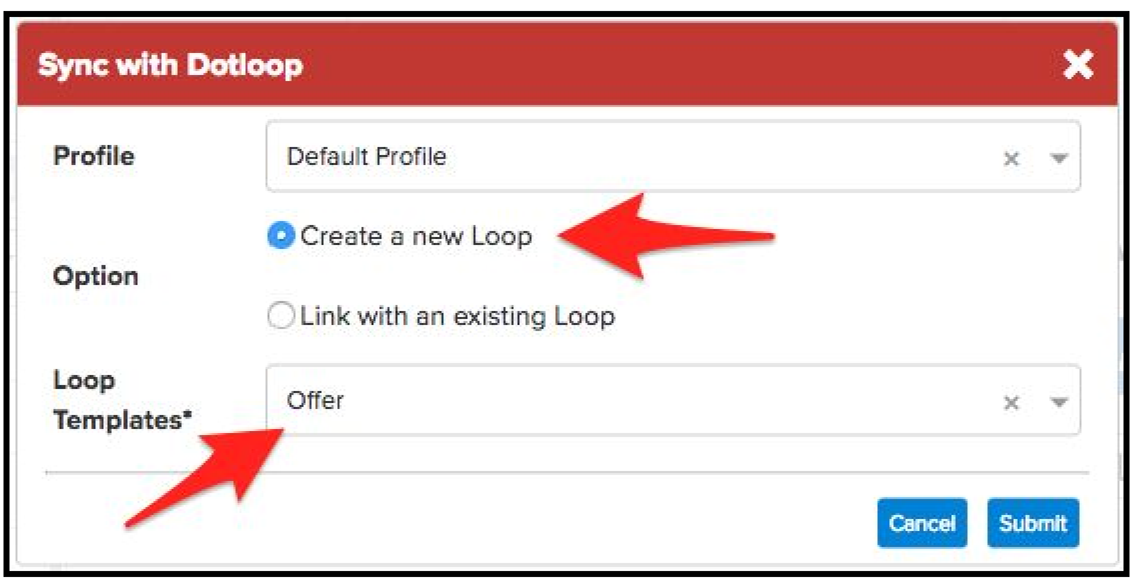
Connecting your Dotloop account:

If you have not done this yet, visit: **User Setup 03: Dotloop Integration** for information on setting up your Dotloop integration.

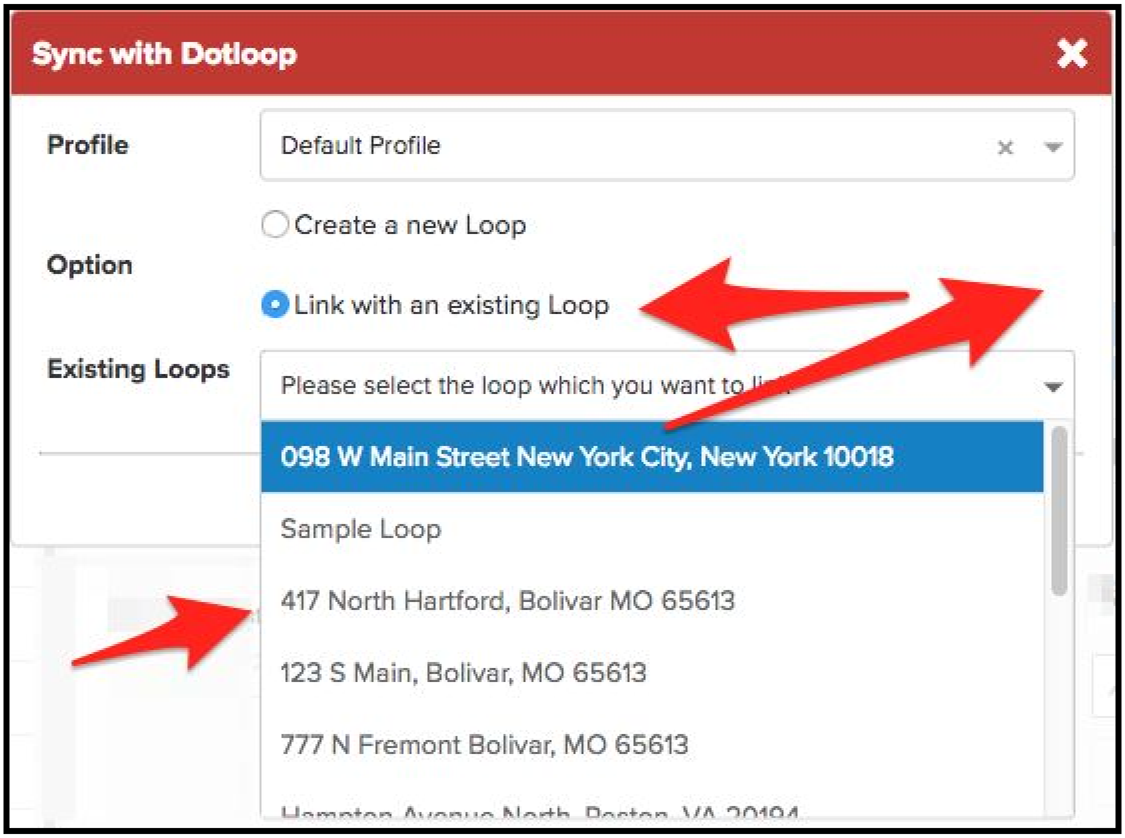
How does the integration work?

Click on the Dotloop icon in the upper right corner of the property record. (SEE VIDEO)

Realvolve will display a popup window to collect some basic information to proceed. Select the profile (if there are multiple profiles available) Remember that only one loop can be connected to a Realvolve property so choose the correct profile as needed. Then, select **Create a new Loop** to start a new loop from the realvolve property and select a Loop Template when needed.

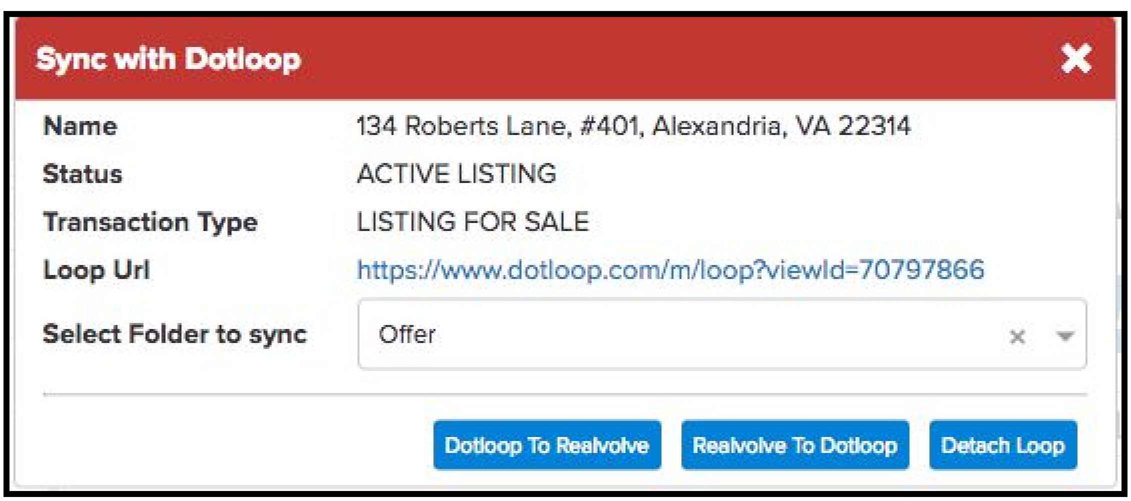


Select **Link with an existing Loop** if a loop for this property already exists and you want to connect to it.



After choosing **Create a new loop** or **Link to an existing loop**, Realvolve will begin the process of making the integration connections. *This process can take a few minutes*.

After creating a loop from a Property (Listing) the system will show the following information when the Dotloop icon is pressed. The Name / Address, Status, Transaction Type as well as the loop URL and folder to sync.



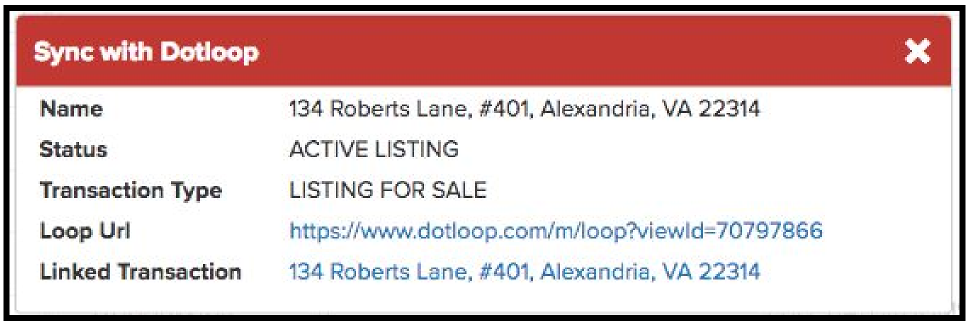
Click on the Loop URL link to open a new tab with this loop

Choose the Dotloop folder to sync with the Realvolve files tab of the property.

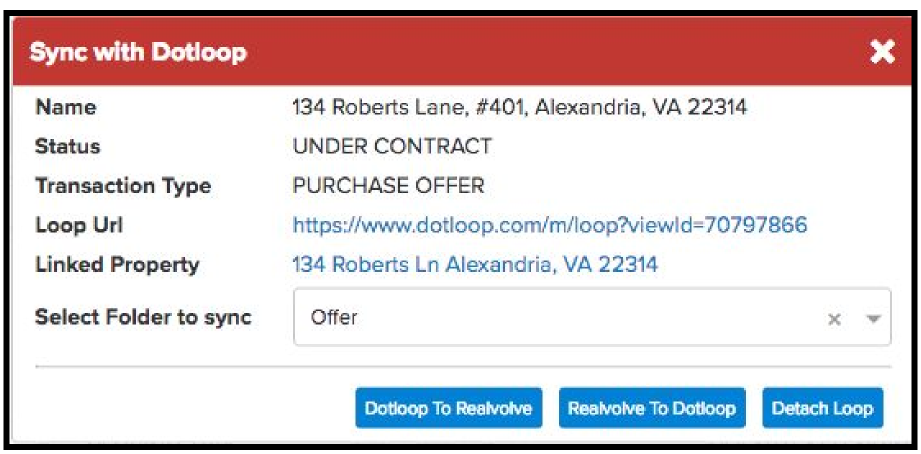
Decide which direction you want to sync the data. **Dotloop to Realvolve** will sync all data in Dotloop into Realvolve. **Realvolve to Dotloop** will sync all data in Realvolve into Dotloop.

If you need to disconnect a loop from a property or transaction then click on [**Detach Loop**]

If a transaction is started from a property then the Dotloop link is transferred to the transaction and syncing can not be initiated from the property and must be done in the transaction. Clicking on the Dotloop icon from the property will show basic information but the buttons will not be available.



Clicking on the Dotloop icon from the transaction in this case will show the following popup with syncing buttons. When a property is connected to a realvolve transaction, the transaction is the authority and all syncing is done from the associated transaction and NOT the property. Any property information that is in Dotloop will be synced back to the linked property of the Realvolve transaction.



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

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Questions?
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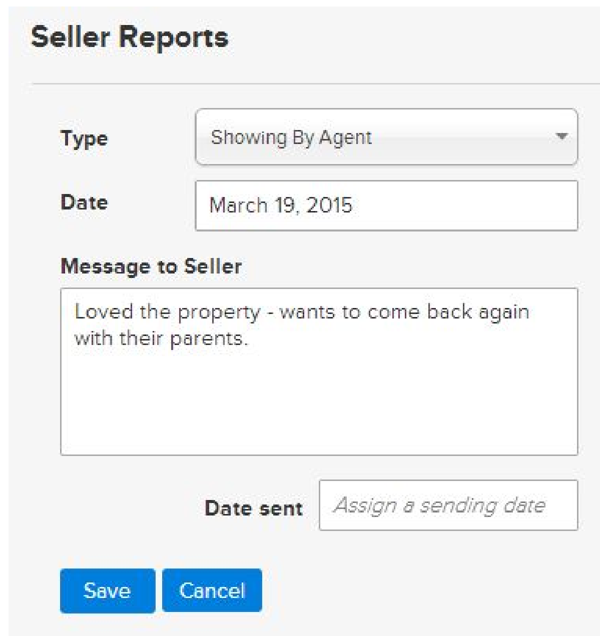
Seller Report Tab

Basics: All Users

The **Seller Reports** tab is used for making regular comments to update the seller on your marketing efforts. Seller report entries can be added by using the (**+**) button in the upper right corner of the Seller Reports tab or by using workflow activities which request updates on a regular basis.

When entering seller report information manually, select the **Type** from the drop down menu. Enter the current **date** as well as the **message to the seller**. You can leave the **Date sent** field blank so that the system can include the message the next time a seller report email is sent. Once the email has been sent, then the **date sent** field will be entered automatically. Press the **Save** button once you have completed your entry.

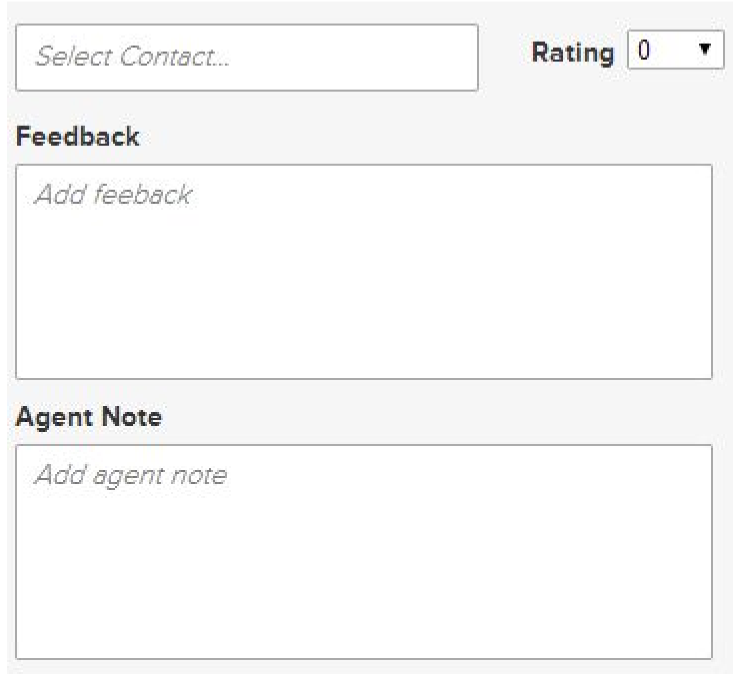


The **Type** field will be one of the following:

- **Open House**
- **Showing**
- **Preview By Agent**
- **Showing By Agent**
- **Agent Tour**
- Activity
- Ad Call - Homes Magazine
- Ad Call - Newspaper
- Ad Call - Postcard
- Ad Call - Email
- Ad Call - Web
- Ad Call - Sign
- Ad Call - MLS
- Call - Floor
- Call - Agent
- Inquiry By Email
- Other

Additional information will be displayed on the right side of the tab when selecting one of the **BOLD** items at the top of the list above relating to showing a property to a contact.

The **Select Contact** field allows you to type in a name of a contact. When typing the system will show a list of names that match. Pick from the list to assign an existing Contact or enter a new contact name and it will be added to the database. This creates a link between the Contact and the property so you can view which properties a contact has been shown.



Rating allows you to assign a 1-10 rating of the house by the Contact. Selecting 1 (low rating) to 10 (high rating) helps you know which properties the contact liked the most.

Feedback is used to record the Contact's comments and feedback on the property that can be reported to the seller.

Agent Note is a personal note to yourself which is not shown to the Seller nor the Showing Contact.

Manually Entering Data: ([SEE VIDEO]())

Note: I will discuss this tab again after explaining templates / workflows in more detail.

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

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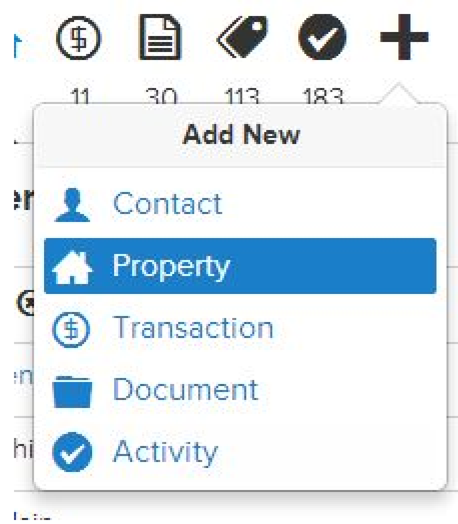
A REALVOLVE HOW-TO | By Mark Stepp

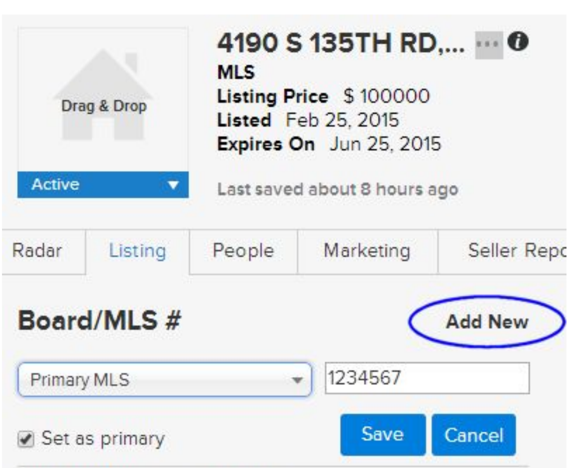
Adding Properties (Listings)

Basics: All Users

As a real estate professional, your bread and butter is probably your listing inventory. Keeping track of property details like the number of bedrooms, bathrooms, square feet, and other important information is easy in Realvolve. Connecting the Sellers, Stager, Photographer, and Marketing Assistant from your contact database to the property helps to keep your records organized. The ability to share all the links to the advertised property, as well as updating your sellers with the latest progress made on marketing their property is just a click away. While that is all very important, the best part of Realvolve is the ability to use this all this data with the powerful Workflow Streams to make your job easier on a day-to-day basis.

Adding the Property to Realvolve is similar to the steps for adding contacts. Click on the (**+**) sign in the list view then choose **Property**. This opens a new data entry screen to add your listing information. Start by entering the address then the Listing Price, Date Listed, and Expiration Date which are all located at the top of the screen. When you leave the **Expires On** field, the system will ask if you want to add a Listing Expiration activity. Answer **Yes** to have Realvolve add the expiration date to your calendar as a reminder. (SEE VIDEO)





In the **Listing** tab, click on the **Add New** link to the right of "Board/MLS #" to add the MLS Board and MLS Number. If the **Set as primary** option is checked then the MLS Number will be placed in the top section of the screen for reference. Many agents belong to multiple boards and using the "Add New" allows you to add as many MLS Numbers as needed based for your area. Only the one selected as primary will be placed in the upper section of the screen. (SEE VIDEO)

Fill in the remaining fields as needed in the Listing tab to complete your property profile. All information in the property profile can be used in templates and workflows.

Once you have the basic data entered, click on the **People** tab to select the party members for the property using drag and drop from your contact database or manually enter the contacts if they do not exist. Party member types shown in the list can be customized for Properties and Transactions based on your area. (SEE VIDEO)

Next, click on the **Marketing** tab to enter the URL address locations of your marketing websites like Realtor.com, Zillow, or Trulia and others as well as any marketing taglines or narratives that you might use in blast emails. All of this information can be included in your email templates by using the appropriate merge fields.

I will skip the **Seller Reports** tab for now, it will be discussed later.

The **Showings** tab allows you to keep the basic information needed to access the property for showings. It includes the tenant name if not the seller, the Alarm and Gate Codes, Lockbox Number, and Shackle Code or Other code if needed. In addition, you can enter specific Directions to the property or Showing instructions. Again, all of this information can be included in a template for emailing other agents.

The **Files**, **Calendar** and **Activities** tab of a property is exactly the same as the tabs in the Contact section (see previous training documents)

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

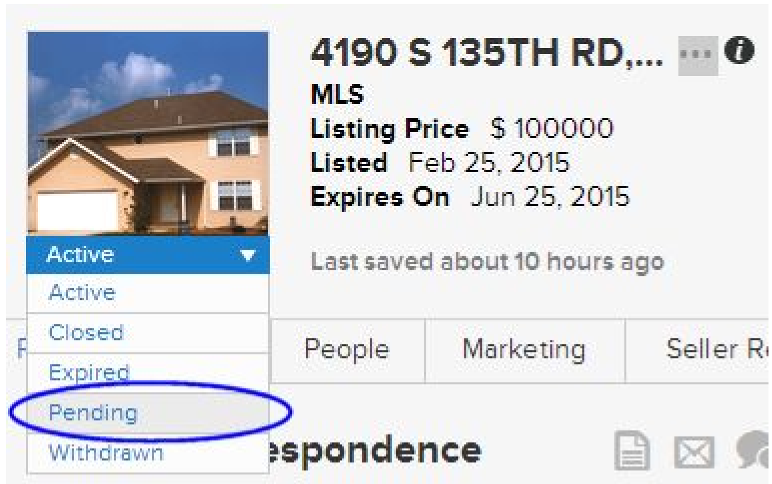
A REALVOLVE HOW-TO | By Mark Stepp

Creating A Transaction

Basics: All Users

Once you have a buyer for a property, you can start a transaction in one of two ways:

The quickest and easiest method if you already have the listing in your property database is to go to that address and change the status from "**Active**" to "**Pending**". This will cause a message to display, asking: **Would you like to add a transaction for this property?** Answer **Yes** to have information from the property copied to a new Transaction.



This includes the the Photos, Address, and contacts in the People tab and it creates the link back to the source property.

The second method of adding a transaction to Realvolve if you don't have an existing property is to use the Add New button in the list view like you did for Contacts and Properties. Click on the (**+**) sign in the list view, then choose **Transaction**. This opens a new data entry screen to add your transaction information. Start by entering the property address, MLS number, the sale price and close date, if known at the top of the screen. Continue entering the Details section of the **Transaction** tab.

The **Signs at Close** field allows you to list all known parties that need to sign the contract, enter any **terms** and the **closing type**. The **Transaction Type** of "**Selling Only**" when you represent just the seller, "**Buying Only**" when you only represent the buyer, or "**Selling & Buying**" when you represent both the seller and the buyer are used when calculating information in the **Commissions** Tab. Make sure you select the proper transaction type so that your commission information is accurate.

The **Important Dates** area allows you to enter all the key dates for this transaction. These dates are used in workflows for reminders and processing of activities through the closing process. Obviously, not all dates are known at once, but enter the dates and times as they become known to allow workflow activities which use those dates will be calculated automatically. We will discuss workflows soon so just keep in mind that the dates will come from this area for now. The list of important dates can be customized based in the settings area. (SEE VIDEO)

The **Property** tab shows the corresponding property connected to this transaction. If you opted to add the transaction manually then this tab will be blank.

Customizing which fields are available (SEE VIDEO)

The **People** tab is identical to the people tab in properties however there are more party member types in the transaction area. The same functionality for adding contacts is available as well as the ability to customize the party member types that are displayed.

Short Video: (SEE VIDEO) Detailed Video:(SEE VIDEO)

The **Files**, **Calendar** and **Activities** tabs are the same as those found in the **Contact** and **Properties** sections.

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

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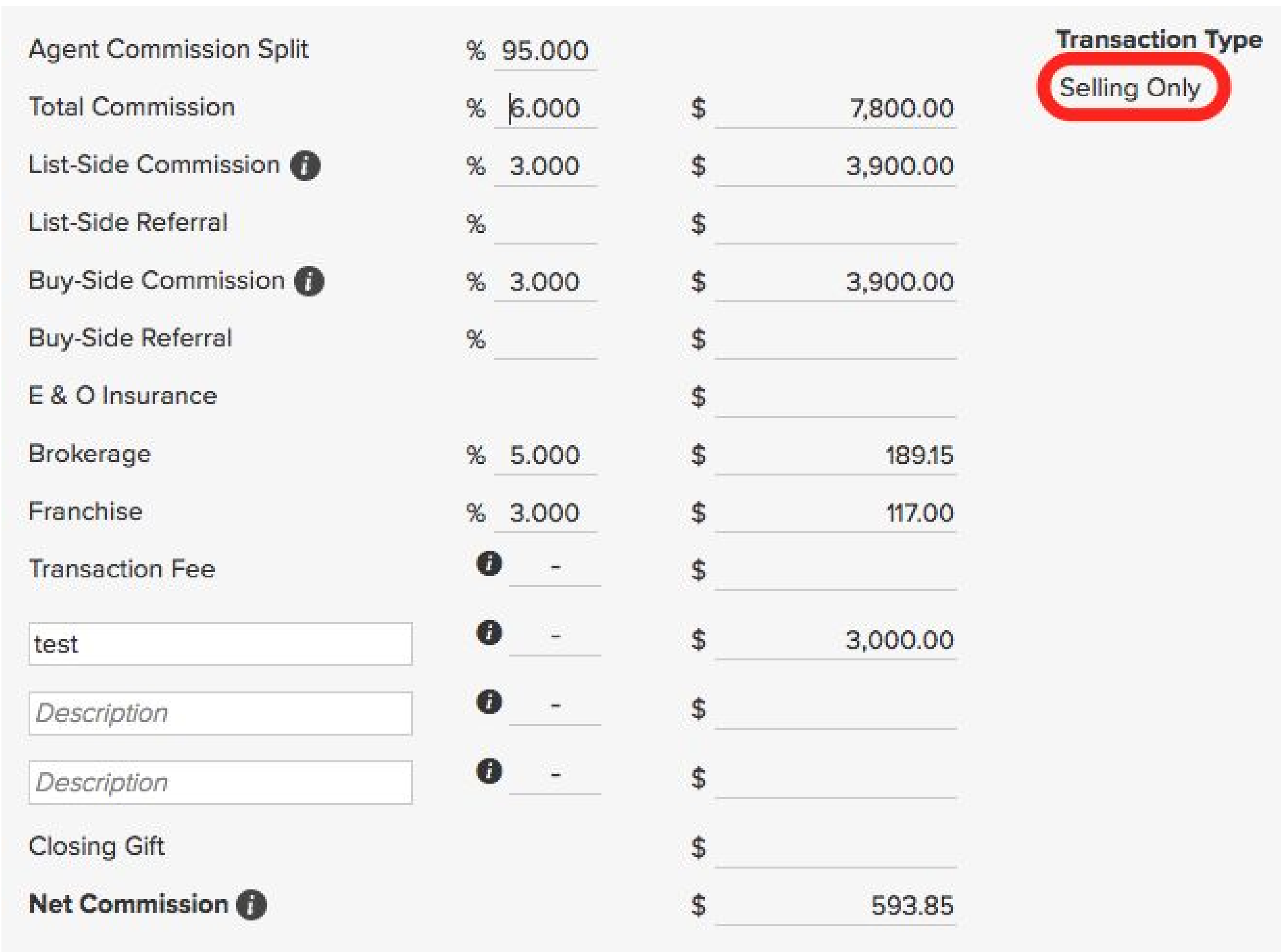
A REALVOLVE HOW-TO | By Mark Stepp

Commissions Tab

Basics: All Users

The last tab to cover in the Transaction section is the **Commissions** tab. This allows you to keep track of your commissions based on information entered in the transaction. The key fields that are required to make accurate calculations are the **Sale Price** located in the upper section of the transaction, the **Transaction type**, and the basic fields in the Commission tab itself. The example below uses a sales price of **$130,000** and the transaction type is "**Selling Only**."



I entered the **Agent Commission Split** of 95% so the Brokerage will get 5% automatically. Every agent is on a different split so make sure you enter this according to your brokerage agreement.

The **Total Commission** field shows the full commission percentage for both sides.

The **List-Side Commission** is used if the **Transaction Type** is "**Selling Only**" or "**Selling and Buying.**" Enter the correct commission percent for the listing side as well as any Referral fee that needs to be paid out by percent or agreed amount.

Enter the **Buy-Side Commission** percent if the transaction type is "**Buying Only**" or "**Selling and Buying.**" The calculated amount of commission will show as well. Again, enter any Referrals paid out along with other expenses listed. The **Transaction fee** can be **Added** or **Subtracted** depending on your needs. Some agents are charged a transaction fee by their broker while others are able to charge the client a fee. Use this as you see fit. There are three miscellaneous fees that get charged against your commission as well as a closing gift field. The **Net Commission** is then calculated based on all known information to show the accurate amount.

To make sure the commission information is properly reported in your dashboard you need to make sure you select the correct "Contact Record" for the Seller Agent or Buyer Agent. Watch this video to make sure you are setup correctly.
IMPORTANT VIDEO: (SEE VIDEO)

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A REALVOLVE HOW-TO | By Mark Stepp

Seller Report Template

Previously, I discussed the Seller Report tab in a Property. Today, I will show how to use information in that tab within a template and a workflow.

We've designed Realvolve with special merge fields for updating sellers on the actions taken to market and sell their property. Take 6 minutes to watch the video (SEE VIDEO) on creating a template, using checklists and actions to automate the entire process.

April 09, 2015

Mark & Kathy

Below is a summary of properties shown.

- 04/09/2015 (Showing) They liked the house but the location to city wasn't right.
  Feedback: Needs something closer to office
- 04/09/2015 (Showing) Great showing today
  Feedback: liked the property - loves the open living room
  Rating: 7
- 04/09/2015 (Showing) like the property
  Feedback: wants to see other options - not a fan
  Rating: 1
- 04/04/2015 (Showing By Agent) showed the property by an agent
  Feedback: great location - loves the back yard
  Rating: 6

Joe Agent
ABC Realty

The 3 special merge fields for seller report are listed below:

- [[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

NOTE: For the example email we used the **NonSentOnly** merge field so that each time we email the seller they only get the Seller Report information that we have not already sent (only the new entries). The key concept is to understand that you are able to make small comments in the seller reports area and update your seller on a regular basis using workflows.

TIP: The video shows sending the weekly report to the seller manually. However, If you have the automated emails setup then the email to the seller can be sent automatically at the appointed time.

When using the **Showings** options and assigning contacts to the property, additional contact merge fields can be used to send similar types of information. These merge fields are available for templates that have the "Use With" set to **Contact**.

- [[Contact#ShowingReport]] - All Showing Items in list
- [[Contact#ShowingReport-SentOnly]] - Showing Items Previously Sent
- [[Contact#ShowingReport-NonSentOnly]] - Showing Items Not Already Sent

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Questions?
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Templates

Advanced: All Users

There are two parts of the automation system of Realvolve:

1. **Templates**: The pre-written emails and text messages to send to contacts in the database.
2. **Workflows**: The pre-designed tasks for handling day-to-day processes.

A template is nothing more than a pre-designed **Email**, **SMS text**, or **Twitter** message containing merge fields 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 deliver to your contact and send it. This can be done manually using the email feature in Realvolve or by using an action on a workflow activity (which we will get to in the next email).

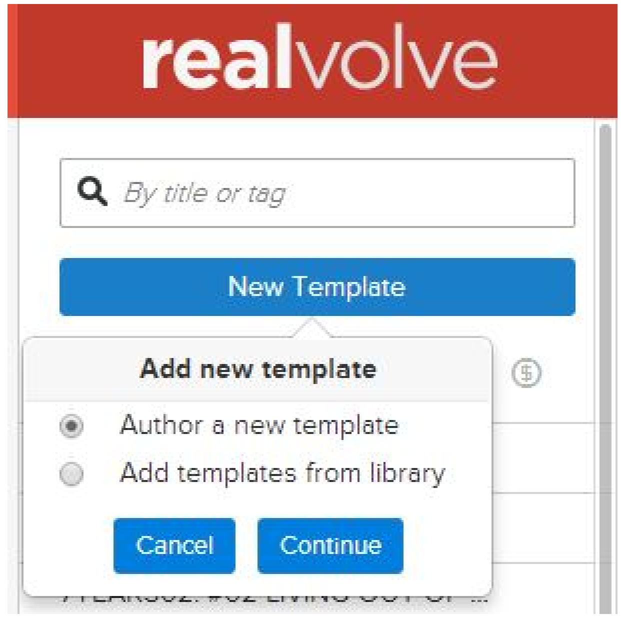
Setting up a standardized message is as easy as writing it from scratch except that you can include merge fields which get filled in to personalize the message before it is sent. You can use as many different merge fields as needed when creating your message.

TIP: There is a full list of all merge fields in Appendix B the **WorkflowTutorial.pdf** (CLICK HERE)

Setting up 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. You might think about setting up a Lead Generation workflow which sends an email every day for 10 days to new leads. Creating the emails that you will send *First* will make the process easier when you want go to setup the workflow.

To create a template do the following: (SEE VIDEO)

1. On the top menu of Realvolve, click on **TEMPLATES** to display the template editor.
2. In the list view on the left, click on [**New Template**] > **Author a new template** > **Continue**



This creates a blank template area to enter your message.

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 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.

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**" in the "Use With" field 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]]**

NOTE: Be sure to reference the **WorkflowTuturial.pdf** for detailed instructions for setting up templates.

Merge Fields Explained Video 1: (SEE VIDEO)

Inserting Merge Fields Video 2: (SEE VIDEO)

ACTION STEPS:

OK, so now it is your turn! Think about some of the previous emails that you have sent over the past couple weeks that could be made into templates and reused. Recreate them in realvolve using the steps we outlined above and in the videos. Start building your library of templates so that you have them when you need them.

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

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A REALVOLVE HOW-TO | By Mark Stepp

Signatures

Basics: All Users

Anytime you send out an email, it normally contains an area with your personal contact information located at the bottom of the message which is known as a "Signature". Most people include information such as Name, Job Title, Designations, Mailing Address, Email, and Phone Numbers as well as a Photo and Company Logo in a signature. The challenge is that Signatures change over time and having to edit each template with updated personal information would be a real pain,.

To solve this problem, Realvolve has designed two "Signature" templates to use as your signature. The first template is **Signature** which is used for older **'basic'** templates. The second template is **Signature Enhanced** which is used for any of the newer **'Enhanced'** templates. When you want to include your signature in an email, simply insert the [[Signature]] merge field where the signature should be located. Realvolve checks to see if the email template is basic or enhanced then merges in the correct signature template as needed.

The image to the right shows a sample signature template that replaces the merge field [[Signature]] when the message is sent. Changes to the signature can be done in one location and used in any email. Two additional merge fields of **Header** and **Footer** have similar benefits for those users wanting stationery like features in their emails.

ACTION STEPS:

Edit your own Signature, Header and Footer templates so they are ready to use when needed. Go to the Realvolve TEMPLATES area and search for 'Signature' to display all files containing the word 'Signature' then edit the **'Signature'** and '**Signature Enhanced**' as needed to include your personal information. Do the same process for 'Header' and 'Footer' if desired.

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

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Questions?

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

A REALVOLVE HOW-TO | By Mark Stepp

Workflows

Basics: All Users

What is a Workflow?

A workflow is a pre-designed series of activities used to automate typical business processes. Each activity in the workflow can be assigned a date based on a milestone date you specify as being the normal time to start 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 date field as milestone date criteria.

By creating your own workflow 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 in less time.

Much of your daily work can be turned into workflows. What do you do each day that is repetitive in nature? Review the projects that you have done in the past 30 days, the new listing agreements received, the closings you completed and decompose each process step-by-step. The more steps you can enumerate and capture in a workflow, the better.

- **TIP**: *Don't trust things to memory – Items get overlooked and fall through the cracks…*

Consistent service is given to your clients when you force yourself to following the workflow processes. That service translates to superior customer satisfaction and ultimately, more referrals and repeat business. Realizing the power of the workflow in your day-to-day processes will save you time and keep you organized.

Workflow Overview Videos:

- List View: Left Side of the Screen (SEE VIDEO)
- Creating a New Workflow - Part 1: Required Workflow fields (SEE VIDEO)
- Creating a New Workflow - Part 2: Non-Required Workflow fields (SEE VIDEO)
- Adding Activities to the Workflow (SEE VIDEO)
- Adding Activities (Other fields explained) (SEE VIDEO)

Workflow examples:

Activities to perform a task.

- 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.

Activities 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.

Activities after a seller signs a listing agreement.

- To Do's and Checklists.
- Automated emails to service providers for staging.
- Automated data collection/verification for new staff members.
- Automated response emails from showing appointments.
- Automated status updates.
- Phone call reminders.

Activities after Buyer signs a sales contract.

- Automated Reminders to Lenders, Appraisers, Title Reps
- Checklist Requirements
- Email Buyers and other party members on status
- Closing reminders and what to bring.

Activities for 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

ACTION STEPS:

Refer to WorkflowTutorial.pdf and create the "**New Listing Agreement**" workflow on pages **45-47** then add the 9 example activities to the workflow stream on page **64-74**.

Note: Following the steps outlined in the document you will help you gain the basic skills required to create your own workflows.

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

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A REALVOLVE HOW-TO | By Mark Stepp

Example Workflow

Basics: All Users

Hopefully, you have completed the example **New Listing Agreement** workflow outlined in the WorkflowTutorial.pdf, you can now start working on your own workflow streams.

ACTION STEPS:

1) Create a major topic list of things that you do on a regular basis which is repetitive in nature.

Example:

- Lead Generation
- New Listings
- Contact to Closings
- Etc …

2) Pick one of topics from your list and write it on the top of a separate piece of paper. Start making a list of everything which must be completed for the selected topic. If you already have a checklist of items then use it to identify the things you need to complete. Take as much time as needed to write everything down until you can't think of anything else. (Don't rush this part of the process)

Once everything is written down, go back and decide when each item must to be completed. 5 days after the listing date, 3 days before closing, etc … If an item has an email or message which must be sent, highlight that item to remind yourself to make a template.

3) **Repeat step 2** for each topic identified in step 1.

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

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A REALVOLVE HOW-TO | By Mark Stepp

Building Your Own Workflow

Basics: All Users

Did you complete the steps in **Basics 17: Example Workflow**? If not, stop what you are doing and complete the assignment now! It's important to have the outlines in order for you to build your own workflows.

Today, I will explain how to enter the items on your list into Realvolve as workflow streams. (SEE VIDEO)

1. Click on **WORKFLOWS** on the top menu to display the workflow editor.
2. Click on the (**+**) icon in the list view.
3. Select **Create a new workflow** then click **Continue**.
4. Select one of your assignment pages from yesterday and enter the topic of the page as the workflow title.
5. Decide the "**Use With**" setting based on the type of information needed for the workflow.
6. Click on the **Add** button to add this workflow to your system.

Full detail of the workflow basic description can be found here: (SEE VIDEO)

Now, you need to add each activity from your assignment to this workflow. Begin with the first item on your list and enter them one-by-one. You don't have to worry about the order of entry because the system will show the items in order by the scheduled date calculation. If there were any highlighted items on your list that needed templates, I suggest that you create the template for them before you start adding the activity item to the workflow.

I recommend that you watch the following video describing each field of the activity to understand how they are used. There are sections in the video which over the checklists and actions features, I will discuss those in more detail in the next two training days. (SEE VIDEO)

1. Click on [**Add Another Activity To This Workflow...**] to open the activity editor.
2. Enter the **Title** of the Activity.
3. Pick the team member in your realvolve account that will perform this activity in the **Assign To** field.
4. If the activity needs a contact from your database assigned then enter that into the **With** field. An example of would be If you are sending an email to the Seller then pick Party Member: Seller in the **With** field.

5. Click on the **Schedule** drop down to assign the correct date calculation as needed for each activity.
6. If you need to send a message then add an ACTION as needed.
7. Press the **Save** button to save this action.
8. Repeat steps 1-7 for each activity item on your list.

Please reference the WorkflowTutorial.pdf for detailed information on creating workflows.

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

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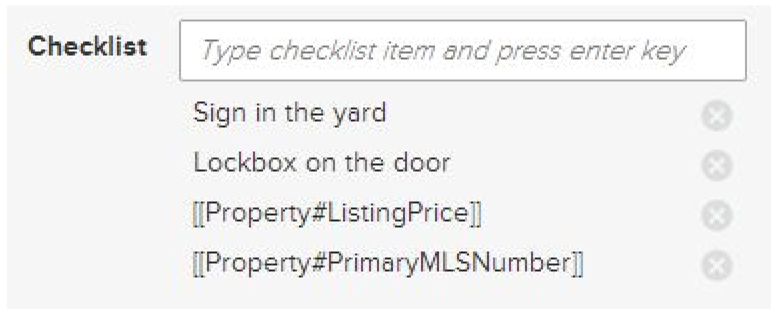
Questions?
Please direct questions and comments to support@realvolve.com.

A REALVOLVE HOW-TO | By Mark Stepp

Activity Checklists

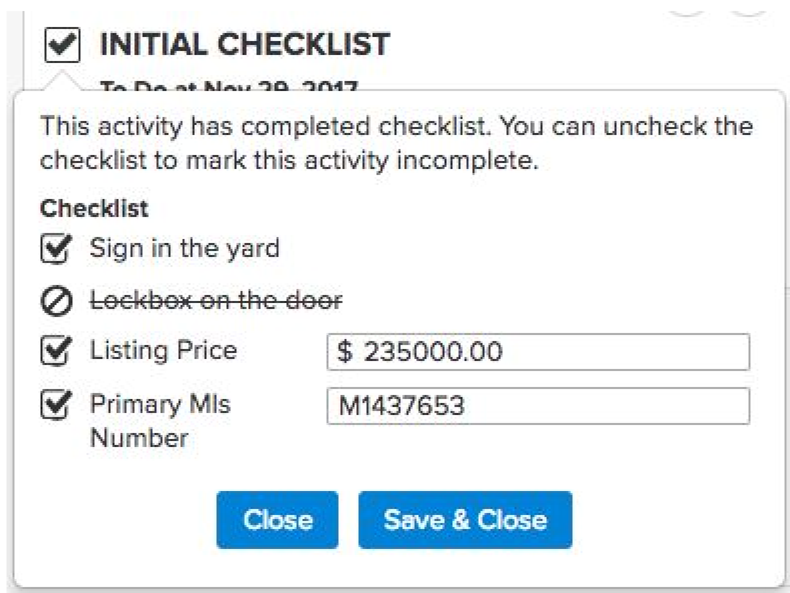
Basics: All Users

A checklist is simply a list of items attached to an activity which must all be "checked off" in order for the activity to be considered “complete”. Other CRM systems require individual activities for each checklist item but that clutters the calendar. In Realvolve, multiple checklist items can be setup in a single activity like "**Sign in the yard**", "**Lockbox on the door**" or can contain database merge fields, a unique feature of Realvolve, to view or edit the content of individual database fields.



The example to the right shows two plain text checklist items and two database merge field checklist items indicated by double brackets.

When the activity comes due and you click on the box to complete it, the checklist will be displayed. The plain text items will show as normal checklist entries and the database merge field items will show the current value of the designated field to allow changes if needed.



For database field items, click in the data entry box located to the right of the field name to make changes to the field value. Clicking in the square box to the left of the item description will place a checkmark in the box indicating that the item has been verified as complete. Clicking a second time on a box will indicate that the item is not needed showing a circle slash and the checklist item will be marked out.

When no unchecked items exist, the activity is considered complete and the activity checkbox will contain a checkmark. Press the [**Save & Close**] button to save the field values from the database checklist items. The [**Close**] button is available to close the popup without saving any changes to the database merge fields.
(SEE VIDEO)

The **Database Field "MERGE FIELD"** feature allows specific fields in Realvolve to be verified without having to search the data entry screens manually. User entry can be cut to a fraction of the normal time allowing new uses to validate fields easily.

Drag / Drop reordering of checklists items are available (SEE VIDEO)

NOTE: *The example above uses checklists **Without** Actions. I will cover checklists With Actions in **Basics 21: Activity Actions with Checklists**.*

Use the following link to see the segment of the video where checklists are described (SEE VIDEO)
Please reference the WorkflowTutorial.pdf for detailed information on creating workflows.

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

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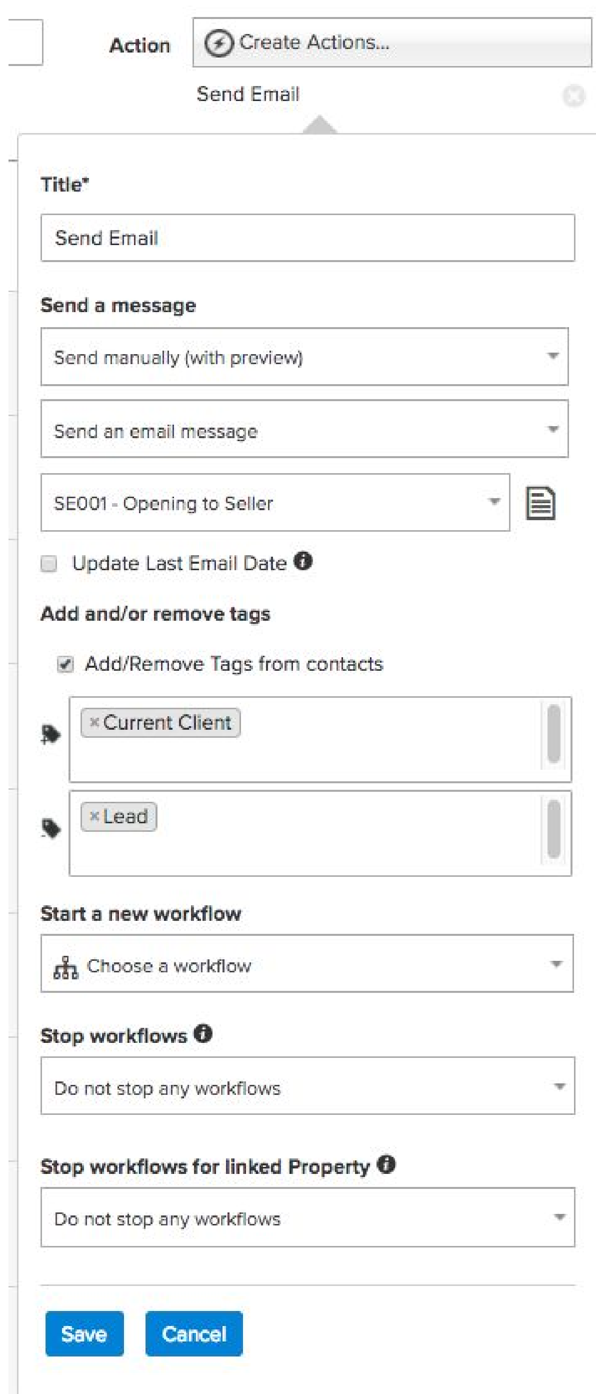
Activity Actions without Checklists

Basics: All Users

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 to allow alternate actions to be performed based on any number of conditions (This is known as branching) .



For this training I will cover actions that **DO NOT** use checklists.

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
  - SMS Text
  - Tweet
- **Add/Remove Tags**
  - Adding Tags
  - Removing Tags
- **Starting / Stopping another Workflows**

Any combination of the 3 options can be used in an activity. As long as you have at least one of the 3 action types selected the system will perform the action as required.

ACTION: Send a Message

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, SMS Text, 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:

- **Do Not Send A Message** – means no message will be sent on this action
- **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.
- **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.
- **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. (see: **User Setup 04: Auto Send Message**)
- **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

- **Email**
- **SMS**
- **Twitte**r

The third menu allows you to choose the correct message template to send. The list of message templates depends on the "**Use With**" selection of the workflow.

ACTION: Add / Remove Tags

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.

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 <u>no contacts</u> 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 <u>no contacts</u> 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 <u>UNLESS</u> 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: Start a new Workflow

The ability to start a new workflow from an existing workflow is an important part of organizing yourself 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.

ACTION: Stop Workflows

This action allows you to automatically stop specific workflows or all workflows that could be running on the Contact, Property or Transaction which this workflow is assigned to. If you have a Transaction workflow you are also allowed to stop any Property workflows that might be running. When stopping workflows the system simply deletes any NON-COMPLETED activities of the selected workflows to stop which are assigned to the Contact, Property or Transaction which the current workflow is connected to. This allows you to start one workflow and stop another or even stop the current workflow after starting a different one. This is a powerful branching feature to take a different path when necessary.

Note: The video in this training shows a checkbox for *send message automatically* **-** this has been changed to a drop down menu showing multiple process methods for sending as described above. (SEE VIDEO)

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

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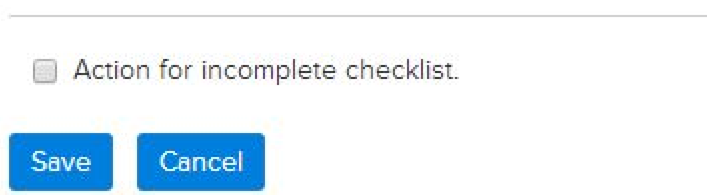
A REALVOLVE HOW-TO | By Mark Stepp

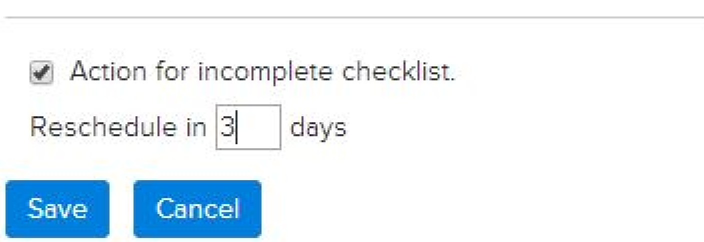
Activity Actions with Checklists

Basics: All Users

In the last training session, I explained Actions <u>without</u> checklists and how easy it was to send emails, change tags and start other workflows from an activity. If that was all that Actions could do, it would be a valuable feature but only slightly better than other CRM and time management systems. Today, I will show how actions in Realvolve go beyond the normal action plan features found in other systems. Today's topic is on **Actions <u>With</u> Checklists** and how to use them. Checklists alone are nice because they allow you to group required elements of an activity together as one unit. To complete the activity all elements of the checklist have to be completed. But what happens when those elements can not be completed? The activity itself isn't complete. So, now what? That is where **incomplete checklist Actions** come into play. When an activity uses checklists and some of the checklist items are not complete, you have the ability to setup actions for incomplete checklists.



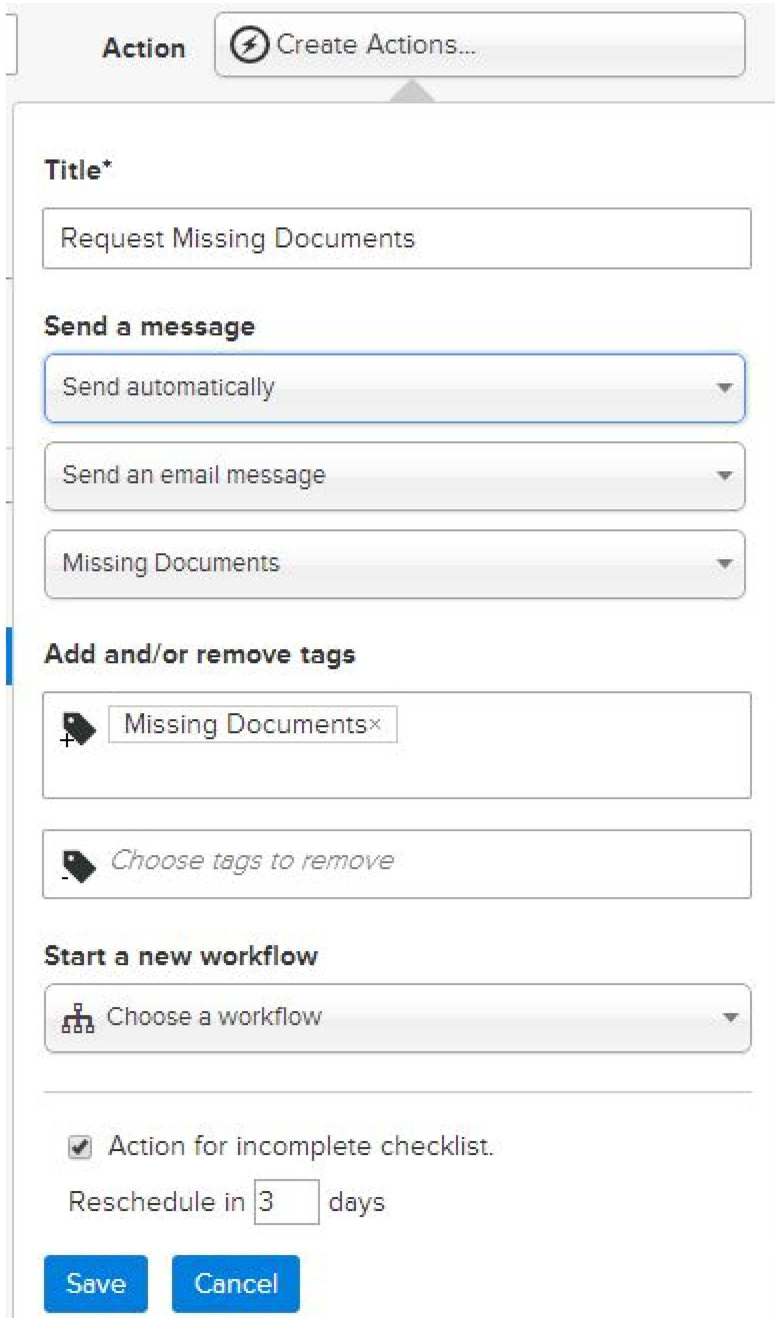
Located at the bottom of the Action popup window is a checkbox labeled: "**Action for incomplete checklist**" Leaving it unchecked (*default setting*) means that the action can run when there are no unresolved items in the checklist. By placing a checkmark in this option it indicates that you need to perform an action in order to complete the remaining checklist items. Just like normal actions, you can have as many incomplete checklist actions as needed in order to handle the exception properly.



In addition to performing the action, incomplete checklists can also specify when to reschedule the activity by entering the specified number of days from today. The example above would perform the actions as needed and then reschedule the activity 3 days from today so you can have time to complete the remaining checklist items.

One use for this feature would be for an activity that has a checklist of required documents to list a property. Assume that you have a checklist of 3 items attached to the activity:

- Signed Listing Agreement
- Signed Seller Disclosure
- Signed Marketing Plan Agreement



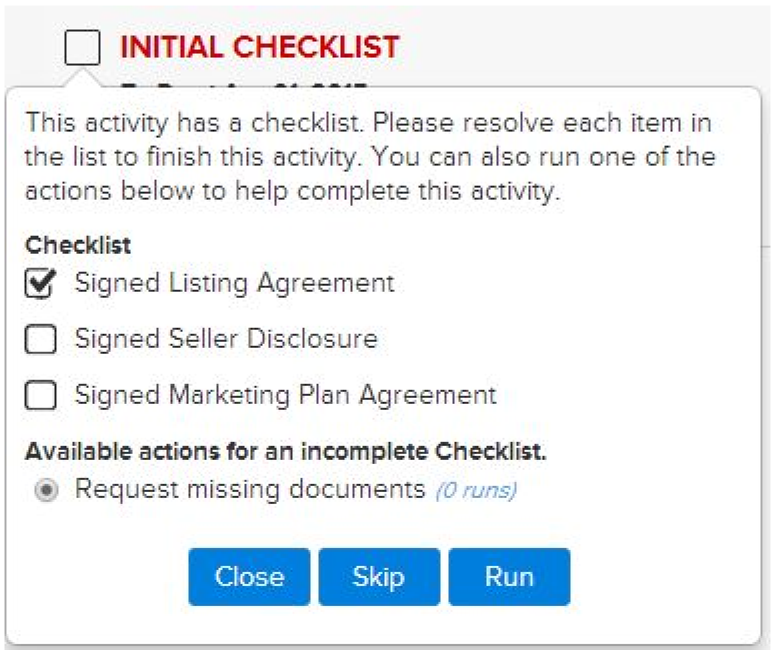
If you did not have all 3 documents, an email could be sent to the seller requesting the necessary documents, add a TAG to the property indicating "**Missing Documents**" and then reschedule the activity **3** days later as a reminder.

To make this work, you would need to setup a template called "**Missing Documents**" that is used with "Property" and contained the basic message requesting that the seller forward you the required documents (*see sample below*). In that template, you would also want to list the required documents so that the seller knew what to send back to you. To do that, a special merge field can be used which pulls checklist items from the activity:

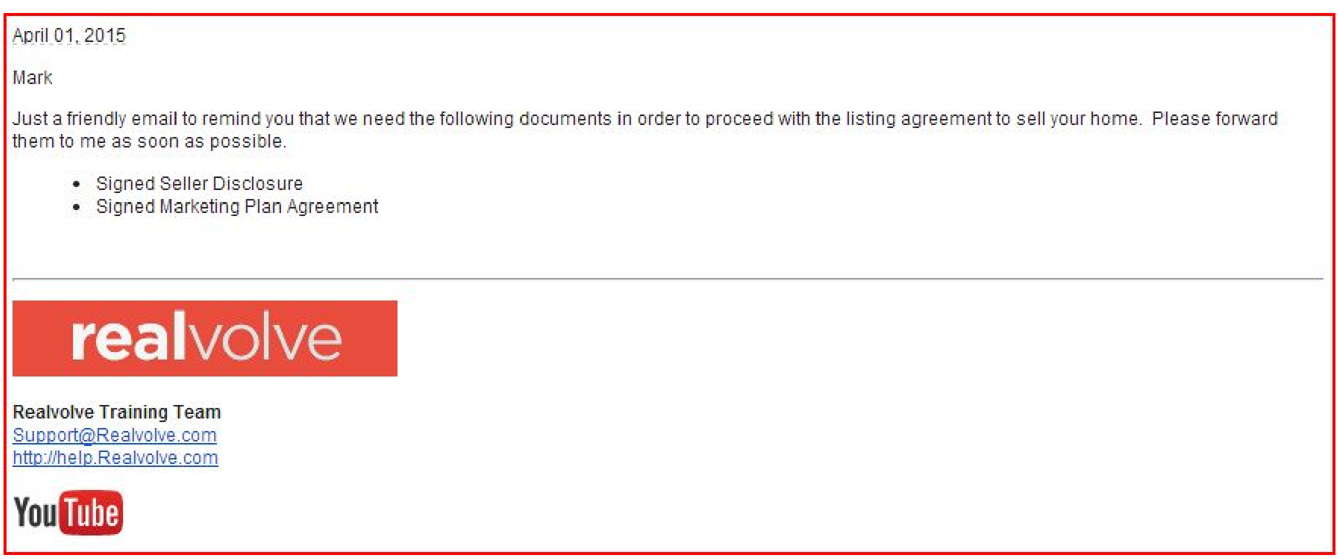
[[Activity:Checklist#Incomplete]]

This merge field will look at the activity checklist to retrieve the Incomplete items (unchecked) and place them in a bulleted list in the email.

When the activity comes due on your calendar, click on the box to complete the activity as usual. A popup window will display the checklist of required items so that you can place a checkmark next to each document that you have in your possession. If there are any unresolved items in the checklist then the "**Available actions for an incomplete Checklist**" will show in the run section below the checklist and list all actions that have the "Action for incomplete checklist" option selected. The system will also show how many "runs" the action has performed. If this is the first time to complete the activity then it will say *(0 runs)*. Each time you run the action the count will go up by 1. Use this information to help decide which action to run if multiple actions are available. It's possible that you could run it 2 times and then send a different email on the 3rd time which stated the importance of getting the documents in before a deadline.



Running this action will send the following email and add the tag "**Missing Documents**" to the assigned property then reschedule the activity to be 3 days from today.


April 01, 2015

Mark

Just a friendly email to remind you that we need the following documents in order to proceed with the listing agreement to sell your home. Please forward them to me as soon as possible.

- Signed Seller Disclosure
- Signed Marketing Plan Agreement

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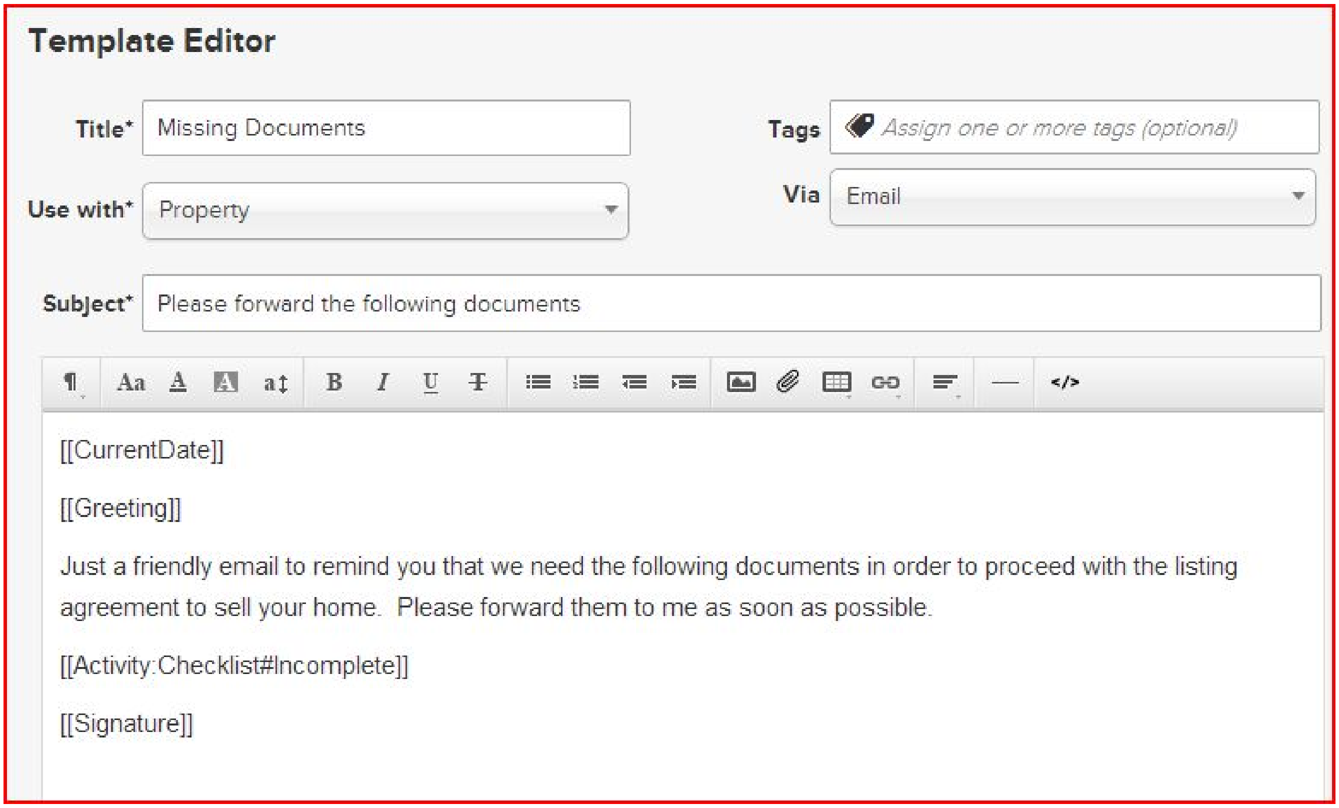
realvolve

Realvolve Training Team
Support@Realvolve.com
http://help.Realvolve.com

YouTube

The template below was used to create the email:



Using Checklists and Actions together will help streamline your daily processes and confirms that important items do not get overlooked.

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

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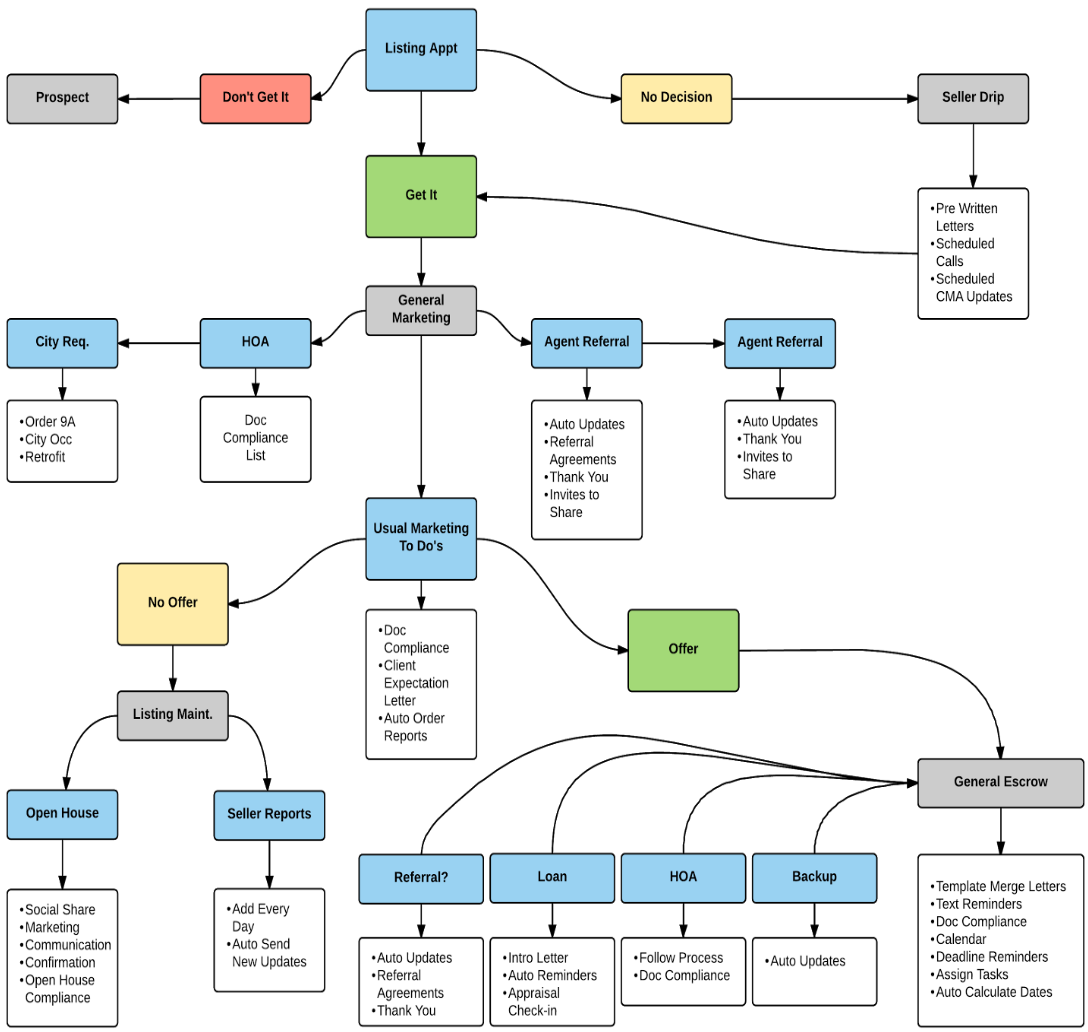
Branching

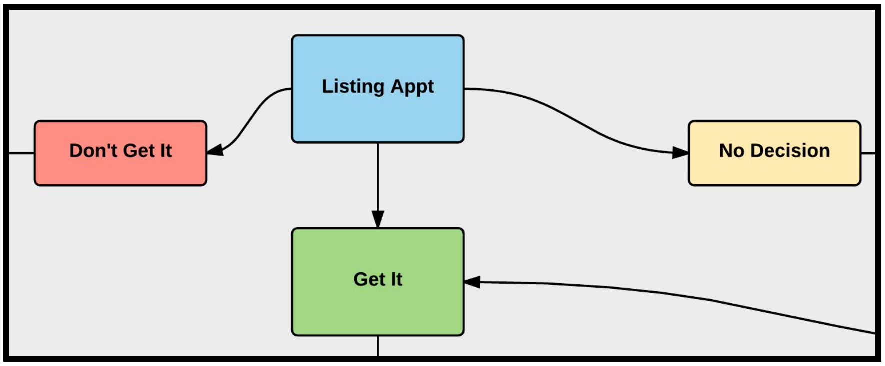
Basics: All Users

Most “Action Plans” found in other software systems will get you from point A to point Z using a linear path: Day 1, do this. Day 2, do that etc ... While this can work in a few cases, it’s not the best solution for things you do every day like listing properties or the contract-to-close process which can look more like this:

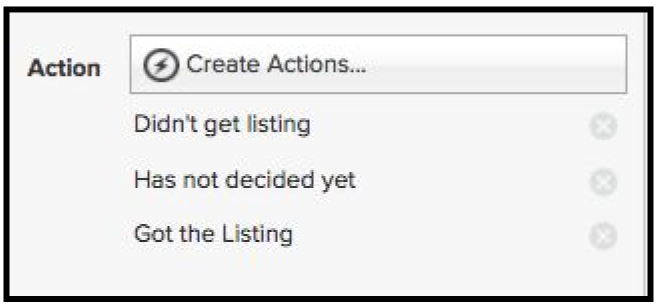


There are many possibilities along the way which force you to alter your plan one way or another. Identifying these options in advance and deciding which direction to choose to circumvent problems, add clarity, or move through a given path shows the power of workflows!

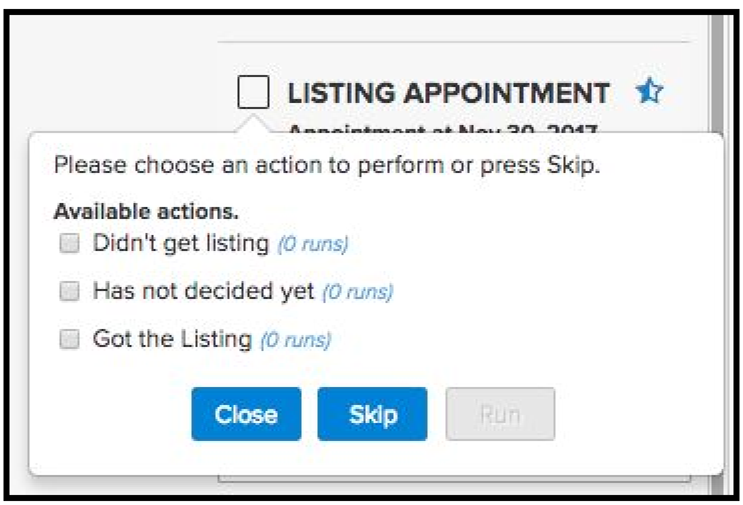
A **branch** is a point in the process which has more than one possible direction to go. The first place we see this in the example above is the “Listing Appt” which has 3 possible outcomes: 1) You **didn’t get the listing** so you need to do more prospecting.



2) They **have not decided yet** so you should do additional nurturing with a drip campaign or 3) you **got the Listing** so start the general marketing process.



Setting up the Realvolve workflow to handle this is as simple as setting up an activity with the 3 actions. One action for each of the possible outcome to start or stop other workflows, send messages, or update tags.



When completing the activity, the list of options will display, allowing you to select the correct path for the situation so the workflow can do the work for you.

It’s that simple!

You just have to refine each step of the process with as much detail to produce an effective path. A good plan guides you through each step of the process. This builds customer confidence and satisfaction which leads to repeat business and referrals.

(SEE VIDEO) This video covers Workflow Checklists and Branching

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A REALVOLVE HOW-TO | By Mark Stepp

Starting A Workflow

Basics: All Users

You can start a workflow from the dashboard or the radar tab of a Contact, Property or Transaction using the **START A WORKFLOW** button.

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: Contract to Close**" workflow.

Short Videos:

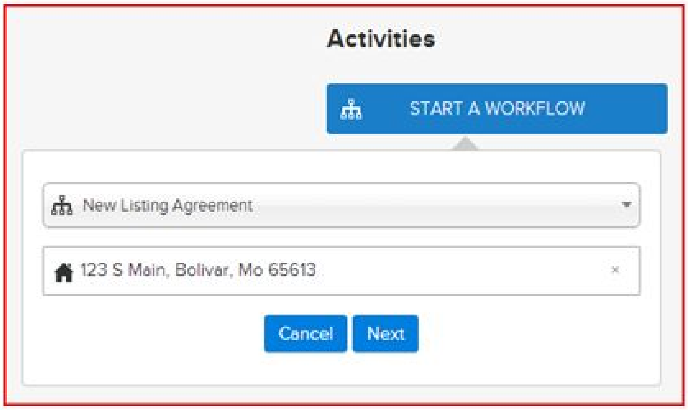
- Start a Workflow 1 (SEE VIDEO)
- Start a Workflow 2: Selecting which activities get started "Groups" (SEE VIDEO)
- Start a Workflow 3: Milestone Dates (SEE VIDEO)
- Start a Workflow 4: Selecting Party Members (SEE VIDEO)
- Start a Workflow 5: Role Selection (SEE VIDEO)
- How to STOP a Workflow (SEE VIDEO)

What is the workflow wizard?

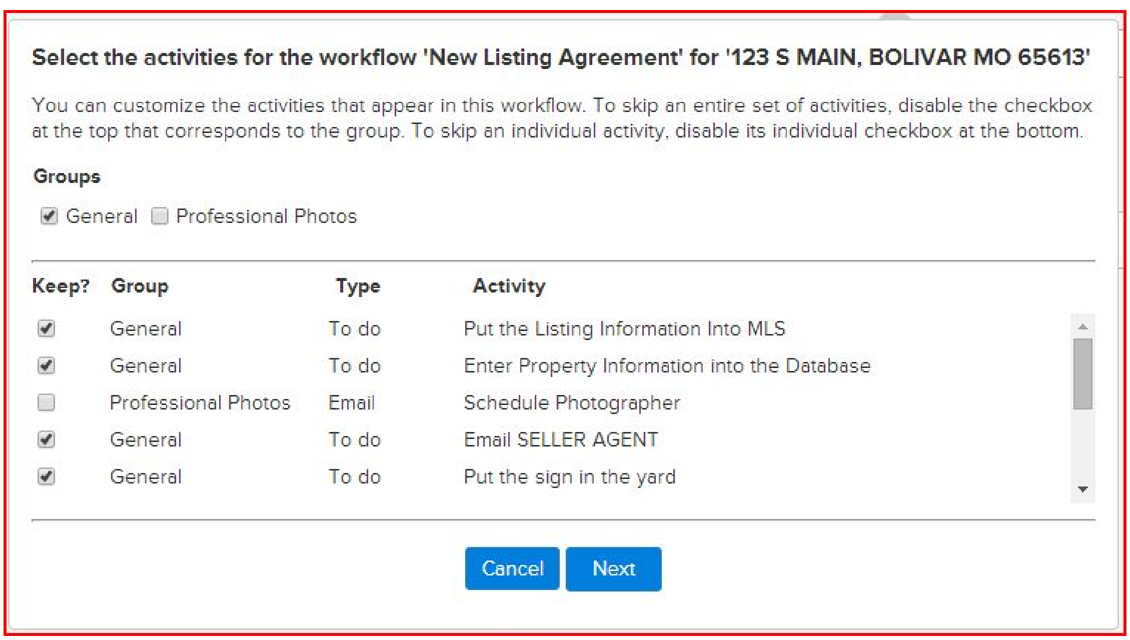
When you click on the "**START A WORKFLOW**" button, the workflow wizard guides you through a series of popup screens to gather the information needed for the workflow. (SEE VIDEO)

Workflow Wizard Steps:

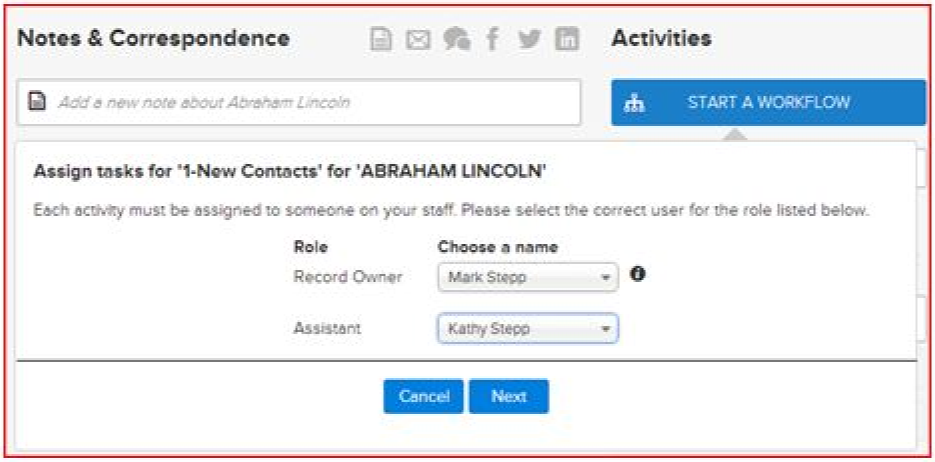
1. Click on **Start a Workflow**
2. Select a Workflow to Start (example: **New Listing Agreement**)
3. Select a Contact, Property or Transaction (example: **123 S Main, Bolivar, Mo 65613**)



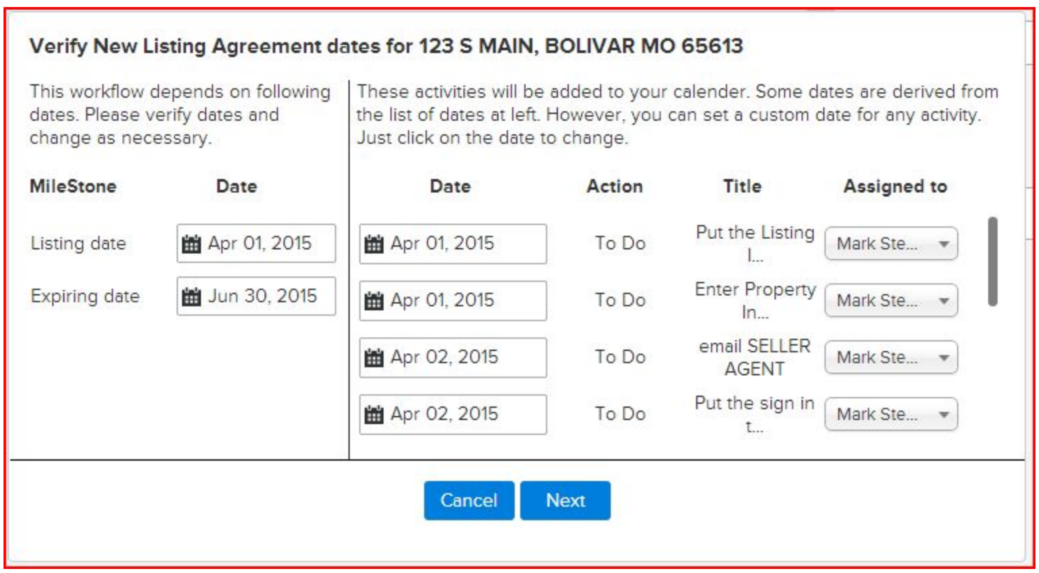
4. Deselect any unwanted workflow activities individually or by group (if any) - the example below has one activity that is in the "Professional Photos" group. If you know you don't want professional photos taken then uncheck the group and any activities in that group will be unchecked. You can assign up to 20 groups per workflow. Once you have all your groups selected then press [**Next**]



5. If Activities in the workflow use any of the "assign to" role placeholders like Listing Agent, Buyers Agent, Assistant, Record Owner, etc.., the wizard will ask which user should assume that role (sample below)



6. Enter milestone dates to calculate individual activity dates.

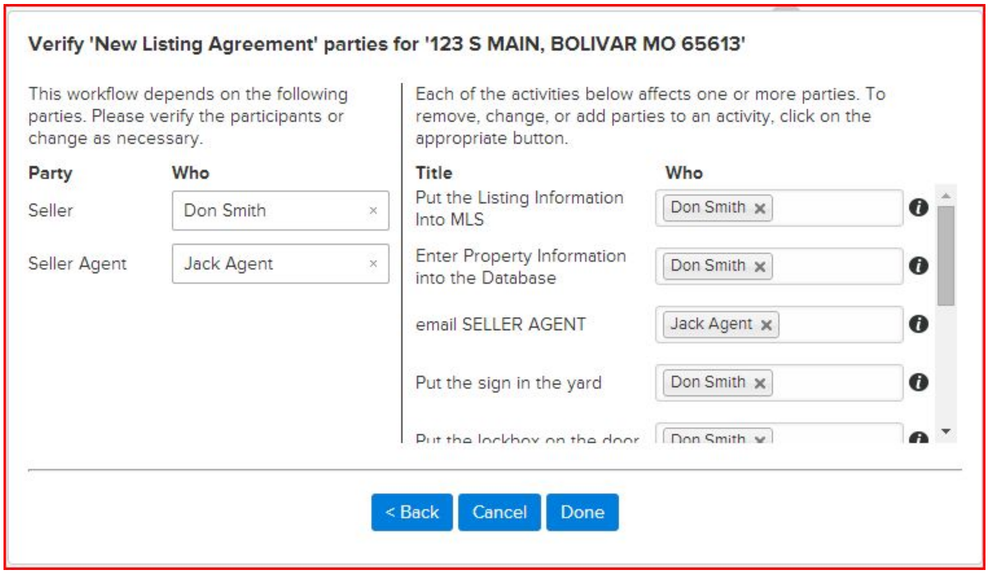


* Changes to milestone dates will recalculate activity dates (Click in to the date field to adjust)

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

* Changes to individual "Assigned to" as needed (Click the drop down arrow to select a User)

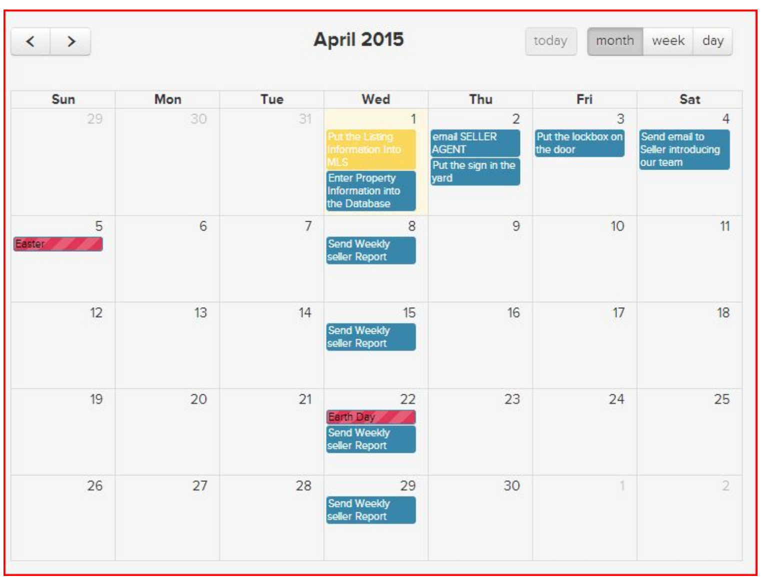
7. If the workflow is for a property or transaction then assign all party members that are known



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.

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

8. You can now go to the calendar tab to view all activities that was added through the workflow.



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A REALVOLVE HOW-TO | By Mark Stepp

Contact Type

Best Practices

Client | **Agent** | **Farm** | **Personal** | **Vendor** | **Prospect** | **Hidden**

The contact type allows the user to specify in a dedicated field the broad type of contact the record is...

- **Client** (**default**) - all contacts added to the database are "Client" by default -
  THIS TYPE IS USED WHEN CALCULATING RFACTOR

- **Agent** - any contact that is a real estate agent
  THIS TYPE IS NOT USED WHEN CALCULATING RFACTOR

- **Vendor** - any contact that is used as a vendor for transactions (Lender, Title, Escrow, Attorney, etc…)
  THIS TYPE IS NOT USED WHEN CALCULATING RFACTOR

- **Personal** - personal contacts usually family members etc..
  THIS TYPE IS USED WHEN CALCULATING RFACTOR

- **Farm** - some contact that you are marketing to in a "Farming Area". A Farming area is a list of names in a subdivision or city area that you market to regularly. The name of the farm could be a TAG.
  THIS TYPE IS USED WHEN CALCULATING RFACTOR

- **Prospect** - some contact that you are marketing to is a "Prospect".
  THIS TYPE IS USED WHEN CALCULATING RFACTOR

- **Hidden** - A contact which is part of a transaction but **NOT** your client. If you are the listing agent and another agent represents the 'buyer' - we have a place in a transaction for 'Buyer' which you could/should put the buyer's contact information as a link. This buyer is NOT your client and you would not want to market to this contact under normal situations. We need the link but the contact should be hidden for all other uses. When the Contact "List View" is shown, **hidden** contacts should not be shown unless the user is specifically FILTERING for "HIDDEN" contact type (new filter). Or if they are SEARCHING for them in a property/transactions people tab or Search field by name. DOES NOT SYNC TO GOOGLE
  THIS TYPE IS NOT USED WHEN CALCULATING RFACTOR

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Questions?

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Stage

Best Practices

Aware | **Know** | **Like** | **Trust** | (**None**)

Contacts go through four stages of a relationship with you. Each stages has a direct impact on the **Contact Status**.

- **None**: The contact is someone that you will not do business with. This could be a vendor or other real estate agent which you would not normally consider marketing to. The **Contact Status** should also be set to **None**. This setting prevents any automation to the contact dealing with the Contact Cross Section.

- **Aware**: The contact is aware that you exist and that you potentially have the ability to assist them with some kind of real estate related activity. Usually, they were made aware of your services through a mutual friend, colleague or through a website or other marketing process that is setup to generate leads.
    - You have **very basic** information about the contact such as **Name**, **phone** or **email**.
    - You **MAY NOT** know if they are interested in **buying** or **selling** a home or any details of their needs.
    - You **MAY NOT** know if you can help them at all, they are simply a name in your database at this point.
    - **Stage** can be affected by the **Contact Status** and will be reassigned if to the following if Stage is currently set to **Aware**.
        - By default the **Contact Status** is assigned as **Suspect**.
        - If the **Contact Status** is **Prospect** or **Lead** then Stage should be reassigned to the next stage of **Know**.
        - If the **Contact Status** is **Client** then **Stage** should be reassigned to the next stage of **Like** if there has been **NO** Referrals.
        - If the **Contact Status** is **Client** then **Stage** should be reassigned to the next stage of **Trust** if there **HAS** been Referrals.
        - If the **Contact Status** is **Past Client** then **Stage** should be reassigned in the following ways:
            - Assign **Stage** to **Like** if contact has only 1 completed transaction but no Referrals.
            - Assign **Stage** to **Trust** if contact has more than 1 completed transaction.
            - Assign **Stage** to **Trust** if contact has 1 or more referrals.
    - If the **Contact Status** is **Suspect** then you **SHOULD** communicate almost daily by email, phone or SMS text to qualify the contact and determine if you can assist them - This process will allow you to move the contact to a **Contact Status** of **Prospect** quickly.

- **Know**: Two-Way communication between you and the contact is happening. A relationship is being formed but they have not decided to sign a listing agreement or buyer's agreement.

- **Stage** can be affected by the **Contact Status** and will be reassigned if to the following if Stage is currently set to **Know**.
  - If the **Contact Status** is **Suspect** then reassign the **Contact Status** to **Prospect**. We know that if a person is in the **Know** stage they are beyond **Suspect** and should advance to the **Prospect** stage.
  - If the **Stage** is **Know**
    - If **Contact Status** is **Suspect** then change **Contact Status** to **Prospect**.
    - If **Contact Status** is **Client** then change **Stage** to **Like** if Referrals = 0
    - If **Contact Status** is **Client** then change **Stage** to **Trust** if Referrals > 0
    - If **Contact Status** is **Past Client**
      - Assign **Stage** to **Like** if Referrals = 0
      - Assign **Stage** to **Trust** if # completed transactions > 0
      - Assign **Stage** to **Trust** if Referrals > 0

- If the **Contact Status** is **Prospect** then you **SHOULD** communicate at least weekly by email, phone or SMS text if not multiple times a week to get more information on what they need to determine if you can assist them - This will allow you to move the contact to a **Contact Status** of **Lead** soon.

- **Like**: *People do business with you because they **Like** you.*
  - When the contact signs a listing or buyer's agreement then **Stage** should be assigned to **Like** unless it is currently assigned to **Trust** and the **Contact Status** should be set to **Client**.
  - If the **Stage** is currently **Like** and **Contact Status** is currently **Past Client** then the purpose of any communication is to ask if they need any Real Estate services or ask for referrals.

- **Trust**: *People do **REPEAT** business with you or **REFER** business to you because they **Trust** you. This is the ultimate Stage that you want to reach and conveys a large amount of trust in you and your services. Anyone in this Stage needs to be continually nurtured and connected with because they are likely to give you more referrals.*
  - When the contact signs a listing or buyer's agreement more than once then **Stage** should be assigned to **Trust** and the **Contact Status** should be set to **Client**.
  - When the contact refers you more than once then **Stage** should be assigned to **Trust**.
  - If the **Stage** is currently **Trust** and **Contact Status** is currently **Past Client** then the purpose of any communication is to ask if they need any Real Estate services or ask for other referrals.

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A REALVOLVE HOW-TO | By Mark Stepp

Contact Status

Best Practices

There are **6** different “**phases**” that a contact goes through as you build relationship with them.

(**None**) | **Suspect** | **Prospect** | **Lead** | **Client** | **Past Client**

Understanding each phase and what promotes a change in order to move to the next phase is important.

Contacts go through three basic **Contact Status** levels before they become a **Client**. They are **Suspect**, **Prospect** and **Lead**. Once a Lead signs a listing or buyer’s agreement, they then become an active **Client**. After the transaction closes then the **Contact Status** should be changed to **Past Client** until the next time an agreement is signed. From that point forward then contacts should cycle between Client and Past Client

What promotes Change in Phase:

- **None** - > **Suspect**
  - Someone gives you a name of a contact
  - The Contact Calls or Visits your website and gives very basic info.
- **Suspect** - > **Prospect**
  - The contact begins having 2-way communication with you about their real estate needs.
- **Prospect** - > **Lead** (knowledge)
  - You know what they need and in what timeframe they need it in. A contact may remain a contact for months before they become a client.
- **Lead** - > **Client** (emotion)
  - They like in you
  - They sign a listing agreement or buyer’s agreement
- **Client** - > **Past Client**
  - The transaction closes
- **Past Client** - > **Client**
  - The contact Trusts you enough to do repeat business with you

Contact Type Phases:

- **None**: The contact is someone that you would not do business with. This could be a vendor or other real estate agent whom you would not normally consider marketing to. The **Stage** should also be set to **None**.

- **Suspect**: You have been given some very basic information about this contact such as **Name**, **phone,** or **email**.

  - The **Relationship score** is very low, typically < 15
  - You **<u>MAY NOT</u>** know if the contact is interested in buying or selling a home or any details of their real estate needs.

    - You **<u>MAY NOT</u>** know if you can help the contact at this time, they are simply a name in your database.
    - You should **Call** them immediately to show interest in helping them.
    - Responding within the first **5 minutes** of receiving their information results in a 600% greater chance of connecting with the contact.
    - If you don't connect quickly then someone else will and you will miss out.
    - Use a **Workflow** to respond to the contact immediately via **SMS Text** is recommended to let the contact know you **will** be calling soon. It is extremely important that you follow through with that promise. This can allow you to a little extra time before you actually make verbal contact.
    - **Stage** should be assigned to **Aware**.

- **Prospect**: The contact has requested information from you and you have responded with the requested information. Two-Way communication continues as you build the relationship.

    - You **<u>MAY</u>** know that they are interested in buying or selling a home but do not know all the details yet. It is your responsibility to press for more information on the current property or desired property.
    - Use a **Workflows** to communicate with the prospect on a regular basis using calls, emails and SMS Text message to nurture the relationship and gather additional information on their needs.
    - **Stage** should be assigned to **Know**.
    - The **Relationship score** will continue to rise during this stage due to email and sms engagement, the additional contact information which is collected, and the Workflow activity intensity.
    - The primary purpose of this phase is to determine the contact's real estate needs and the timeframe to move on those needs. Once this is known then the contact should advance to to the next phase: **Lead**
    - **Stage** should be assigned to **Know**.

- **Lead**: The contact has given you all the information that you need in order to help them with their real estate needs.

    - You **<u>DO</u>** know that they are buying and/or selling a home and you know that you can assist them with their real estate needs.
    - You **<u>DO NOT</u>** yet have a signed Listing or Buyer's Agreement with this contact but your communication should be directed to facilitate that action.
    - Use **Workflows** to communicate with the prospect on a regular basis using calls, emails, and SMS Text message to continue nurturing the relationship.
    - Continue to use specific **Seller Lead Workflows** or **Buyer Lead Workflows** depending on the contact's needs.
    - **Stage** should be **Know** by this time.
    - The **Relationship score** will continue to rise during this stage due to email and sms text engagement, the additional contact information which is collected, and the Workflow activity.

    - Once the **Relationship score** is into the mid-range of other contacts which have a **Contact Status** of **Client** or **Past Client** in the **Like** **Stage** you should continue to press for a signed agreement.

- **Client**: The contact has signed a listing or buyer's agreement.

    - Contact Status gets set to **Client** when a **Property** or **Transaction** record is created to track the progress of the listing or closing.
        - **Property Status**: **Active**, **Pre-Listing**, **Pending**
        - **Transaction Status**: **Pending**, **Clear to Close**, **Contingency**
    - **Stage** should be assigned to **Like** unless it is already **Trust**.
    - Use **Workflows** to streamline the listing and/or closing processes. The goal is to give the contact world-class service that results in a successful closing which promotes repeat business and future referrals. Hiccups do happen during the process. Using workflows help deal with challenges in an organized manner.
    - The **Relationship score** will rise during this stage due to email and sms text engagement, as well as the Workflow activities. It should peak just before closing and start regressing slightly before and continuing after.

- **Past Client**: The contact has closed on a listing or buyer's agreement.

    - The **Property** or **Transaction** status should be **Closed**.
    - If more than one **Property** or **Transaction** is present then all must be **Closed** before the **Contact Status** is set to **Past Client**
    - Assign **Last Purchase Date** with Close Date of Transaction if contact is the Buyer
    - Assign **Last Sale Date** with Close Date on Listings if contact is the Seller
    - **Stage** should be **Like** unless it is already **Trust**.
    - **Stage** should be **Trust** if the number of transactions > 1.
    - **Stage** should be **Trust** if the number of referrals > 1.
    - The **Relationship score** will begin to decrease during this stage due to reduced intensity and engagement to a level consistent with other Past Clients.
    - Use a Post Closing **Workflows** to maintain the relationship after closing.
    - Continue to maintain contact for the next **5-7+ years**.

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Questions?
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A REALVOLVE HOW-TO | By Mark Stepp

Category (A|B|C|D)

Best Practices

A | B | C | D | (None)

This is the User's perceived "Rating" or category that is assigned to the contact. Contacts that are more important to your business should be given a higher category. When the relationship is scored, the user's perceived value is taken into account and helps rank contacts.

The Category can be used in any number of ways, I like to use this as an example.

- (**None**) - Uncategorized contact
- **A** is anyone that has given you multiple referrals or completed multiple transactions with you.
- **B** is anyone that has given you at least one referral or completed one transaction with you.
- **C** is anyone that you would like to do business with you or think they would do business with you when they are ready
- **D** is anyone that you may have previously done business with but it so painful that you would not want to do it again and would be better off to refer them to another agent.

You may choose to do it differently in your business which is totally acceptable. However the assigned importance should use the following guidelines:

- (**None**) - Default value
- **A** is better than **B**
- **B** is better than **C**
- **C** is better than **D**
- **D** is worse than (**None**)

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