A REALVOLVE HOW-TO | By Mark Stepp

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.

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

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