# OnBoard Day 1 - Initial Setup

I want to personally welcome you to the **Realvolve** family. Over the next few days I will share information and video links to acquaint you with the basic features of our system. It's not hard, I promise, but it does take a little effort and patience on your part to get setup properly in order to get the most productivity out of your day.

I'm sure you are anxious to get started and you might even think about skipping ahead or doing something out of order. If you will follow the path that I have laid out, the setup process will flow much easier and you won't have to backtrack on anything to correct your mistakes. Don't stress... its really not that hard!

If you have not watched the Realvolve overview video, do it now to get a quick look at some of the features you will be learning about over the few days ([SEE VIDEO](#)).

First, if you are not currently logged into realvolve, open http://login.realvolve.com and enter your login information. In the upper right corner of your realvolve screen, click on the white down arrow to show the system menu. This menu allows you to access the Settings, Online Help, or Logout of Realvolve.   Click on **SETTINGS** to access the settings options on the left side of your screen.
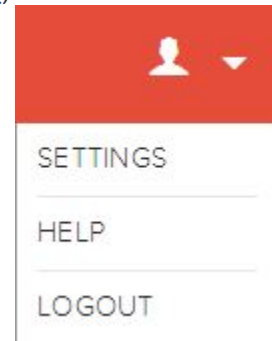
1. Select the "**My Account**" option to enter your personal information. Be sure to fill in all the fields since they are used as merge fields in messaging templates which we will cover later. After you have completed this task then press the **Update** button to save your information.
    Note: Along with entering your personal information, the "My Accounts" section can be used to change your password, view your API Key used for integration with other systems and 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 "**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**.

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

4. 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

5. 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.

6. 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.
   Party Member Video: CLICK HERE
   Date Type Video: CLICK HERE

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