A REALVOLVE HOW-TO | By Mark Stepp

OnBoard Day 28 - Seller Report Workflow

On Day 14, 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.

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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 as we described yesterday 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

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.