

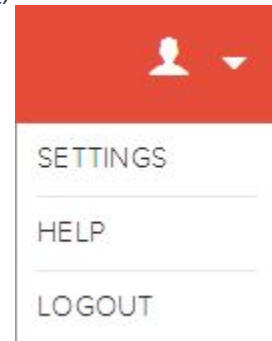
OnBoard Day 1 - Initial Setup

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

Questions?

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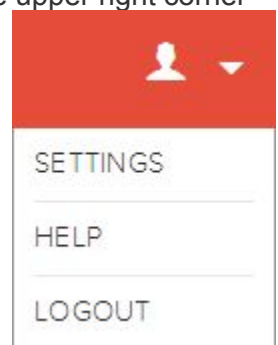
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OnBoard Day 2 - User Permissions

Well, you made it through day 1 and most of the settings have been completed, CONGRATULATIONS!. 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 doing much with 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**.

A light gray form titled 'Send Invitation' with a blue 'Invite A New User' button at the top. The form contains three input fields: 'First name' with the value 'John', 'Last name' with the value 'Smith', and 'Email Address' with the value 'subuser@realvolve.com'. At the bottom are two blue buttons: 'Send An Invitation' and 'Cancel'.

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 view security permissions**" link.

John Smith (subuser@realvolve.com)

Invitation sent on Wednesday, March 11, 2015 5:05 PM

[Resend Invitation](#)

[Click here to view security permissions](#)

[Add New](#)

Type	Access	All users in account	Delete
All Sections ▼	Read ▼	<input type="checkbox"/> For all users	
All Sections ▼	Create ▼	N/A ⓘ	⊗
All Sections ▼	Update ▼	<input type="checkbox"/> For all users	⊗
All Sections ▼	Delete ▼	<input type="checkbox"/> For all users	⊗

☐ Google Sync

☐ Import

☐ Export

[Save Permissions](#)

If this user needs access to SEE 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** have to be given individually, simply use the check the boxes which are needed.

Users & Permissions Video: [CLICK HERE](#)

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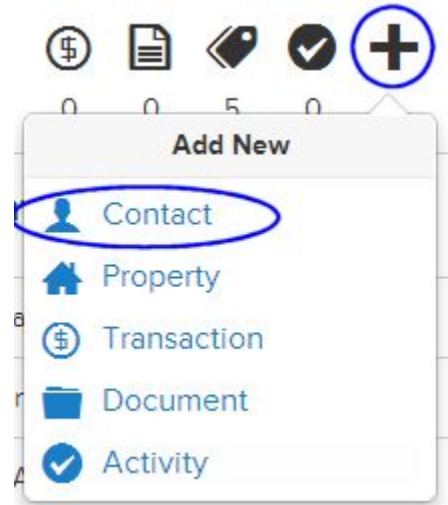
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OnBoard Day 3 - Adding Contacts

By now you may have already started entering contacts into Realvolve and that is great if you have! I'm sure that you were able to figure out most of the process very easily. Today, we will be covering some of the finer details of entering contacts so that you know how it all comes together. I will also go over tips and tricks in keeping your contacts organized so you can find and process them easier.

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

Adding a contact is easy, simply click on the (+) sign in the list view, then click on **Contact**. Of course you will do the same thing when adding Properties, Transactions, Documents or Activities to the Calendar. This will take you to the Contact tab of a new contact record in the database. At the top of the screen click on "FIRST NAME" and enter the contact's first name, then do the same with "LAST NAME".



TIP: Notice the small icon on the right of the last name: ⓘ When you click on this icon, it will copy the "dropbox" email address to your clipboard. This is a special email address given to each contact, property and transaction so that emails can be automatically sorted to the record.

In the Contact tab you can enter the Home, Work and Additional information like Address, Mobile Phone, Regular Phone, Fax, Email and Website. You simply click into the field and start typing. As you leave the field it is automatically saved and your information is secure.

TRICK: Notice the small " ... " ellipsis button to the right of the Address Field.



If you click on the ellipsis button it will display the

"Address Details" screen where each part of the address field is broken out into separate fields to make data entry easier. When using this method, you should 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, Zip, County

and Country where possible. When you press the Save button in Address Details it puts the full address into the single address field for you.

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.

Below the Connections section is the Personal Details where you can store some important data about the contact. By clicking on the (+) plus sign to the right of Relationship status, the system will allow you 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. You can 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 "**John & Mary**" where the Mailing name will be "**John & 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 on both contacts, select those as desired. Once the relationship information has been entered, press the **Save** button to complete the process. [SEE VIDEO](#)

By Entering a **Birth date** into the system, Realvolve will automatically add it to the calendar for you. It is treated as a repeating activity so you will be reminded each year.

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.

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**.

In the **Source Details** section you can keep track of referral information as well as details on where this contact came from. 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 last section of the screen is the Details area. This allows you to keep track of the last time you made a call to this contact, made a personal visit or wrote a personal note. Many real estate trainers and speakers promote the importance of these three concepts. Later, we can use this information for scheduling regular monthly, quarterly or yearly connections.

Video Training: [CLICK HERE](#)

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

Questions?

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OnBoard Day 4 - What are Tags?

Welcome to day 4 of your realvolve training... Yesterday's session covered entering new contacts into the database, today I will discuss how to organize those contacts using TAGS.

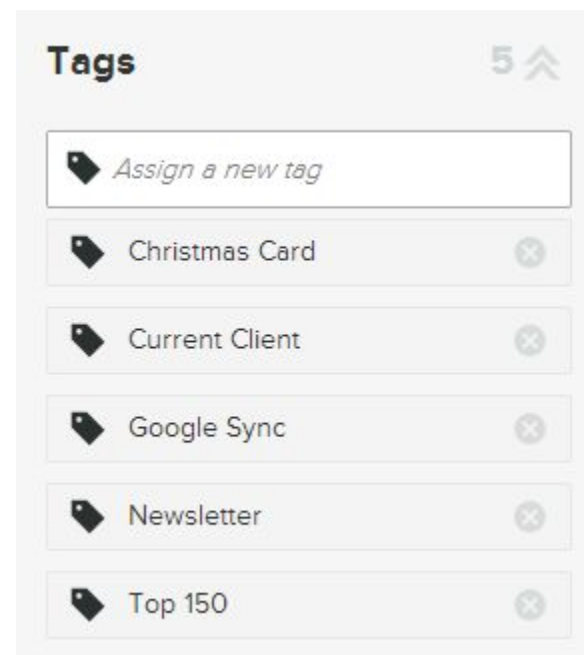
What is a TAG?

A Tag is nothing more than a **Label** or **Classification** that you assign to a contact. Each contact in your database can have an number of tags. Assign each contact with "**Newsletter**" that will receive your monthly newsletter or you can assign specific job related tags like "**Agent**", "**Plumber**", "**Lender**", "**Appraiser**" in order to quickly find a "**Plumber**" in your area. Most agents will assign tags like "**Current Buyer**", "**Current Seller**", "**Past Buyer**", "**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**", "**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.

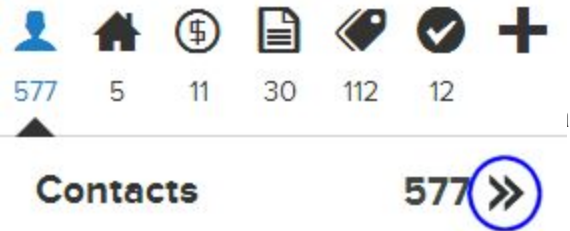
Use the  button next to any tag to remove it from the contact.

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" button in 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, format. Each name in the list has a box to the left that c processing in some way. Above the table of names is a specific tag to each selected contact in the list. This allo apply the tag with less effort than doing them one by one



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, it 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.

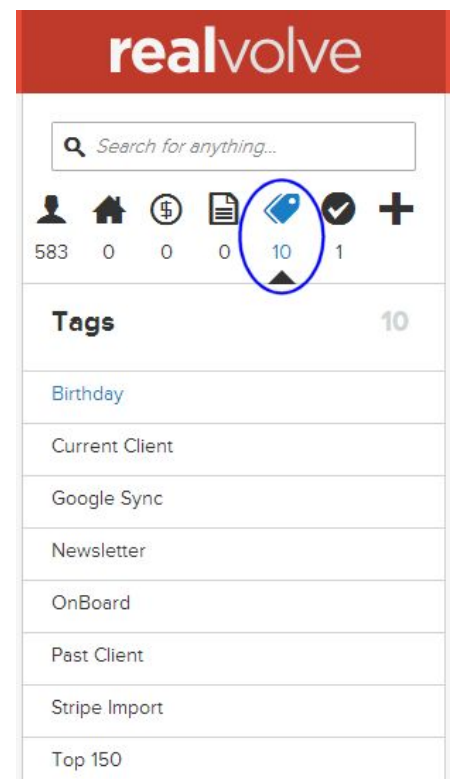
Each tag in the list can be edited or deleted as needed. Simply move the mouse over the tag to display the edit and delete icons and select as needed.



The pencil icon allows you to edit the tag name and the  icon allows you to delete that tag. ([SEE VIDEO](#))

Your job for today is to continue entering names into the database and begin the process of assigning tags to those contacts. You can add them individually or as a group using the View All > Add Tags feature for marked records.

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



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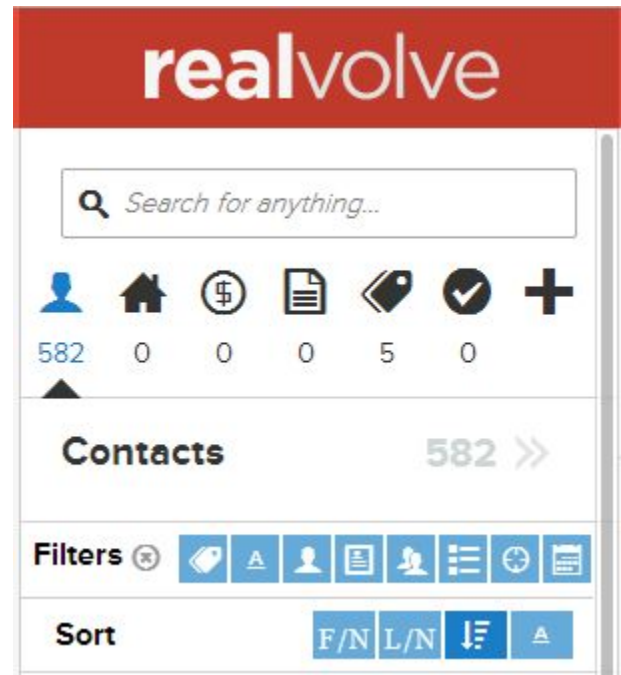
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OnBoard Day 5 - Contact Filters

It's day 5 and you are making progress on getting organized with Realvolve...

Yesterday's session covered adding tags to contacts which makes it easy to find people, today I will discuss how to Search, View, Filter and Sort those contacts.

In the list view, you will see the large box at the top with the magnifying glass. This field allows you to search for any text in the 6 sections of the system.



Above, I entered the word " **Listing**" and Realvolve found **6** Contacts, **10** Properties, **1** Transaction, **2** Documents, **4** Tags and **11** Activities containing the word "Listing". When you click on any of the icons it will show the list of items that was found in that section. Clicking on the **x** button on the right side of the search field will clear the search text and display all the data in each section.

Below the section Icons is the list view heading "Contacts". This indicates which section you are viewing and the number of contacts currently in the list view. Click on the double chevron " >> " to view all data in that section in more detail in the work pane area. The work pane is the right side of the screen where you do most of your work.

Below the list view heading is the Filter section. Here you can filter your data to limit which records show up in the list view. The 8 filter buttons are Tag, Category, Record Owner, Record Type, By Referrer, Source Type, Other fields, Dates.

- **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. [SEE VIDEO](#)

- **Category** - [A|B|C|D] - This filter allows you to search for contacts with any category combination of A,B,C or D [SEE VIDEO](#)
- **Record Owner** - View just those contacts that are owned by a particular user.
- **Record Type** - View just Person or Company contacts.
- **By 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.
- **Other fields** - Used to find contacts that are missing information in Email, Address and Tags. [SEE VIDEO](#)
- **Dates** - Search by Birth date, Anniversary, Last Call, Last Visit or Last Note

How to Filter Contacts: [SEE VIDEO](#)

The last item to cover in this training is the SORTING abilities located under the filter options.

Currently, there are 4 icons which allow you to pick the sorting methods of F/N: **First Name**, L/N: **Last Name**, **Recently Updated** and **by Category** [A|B|C|D]. When you click on a given icon it will show the names in the list view in that order. [SEE VIDEO](#)

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OnBoard Day 6 - Social Network Setup

On day 1, I went through the setup process for everything except for the My Social Network section. Now that we've entered a few contacts and have gotten acquainted with the basic elements of organizing the data, we can go back to the settings area and tie up some loose ends. To do this we need to go back to 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](#).
- Facebook - [SEE VIDEO](#).
- Google - [SEE VIDEO](#).
- LinkedIn - [SEE VIDEO](#).
- Twitter - [SEE VIDEO](#).

Note: I'm sure that you are anxious to get contacts imported from your previous system or sync contacts from Google into Realvolve but I'm going to ask that you wait for the training session that covers this very import topic. The main reason for waiting is that I want to cover as many aspects of the Realvolve as possible in the least amount of time. After importing data or syncing with Google, users usually get caught up in making sure the data is accurate, which takes time. There will be plenty of time after you see how that data will be used in the system to make sure everything is entered correctly. Manually entering a few contacts in the database will help you understand the process better, so hang tight, I will get there... I promise!

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Questions?

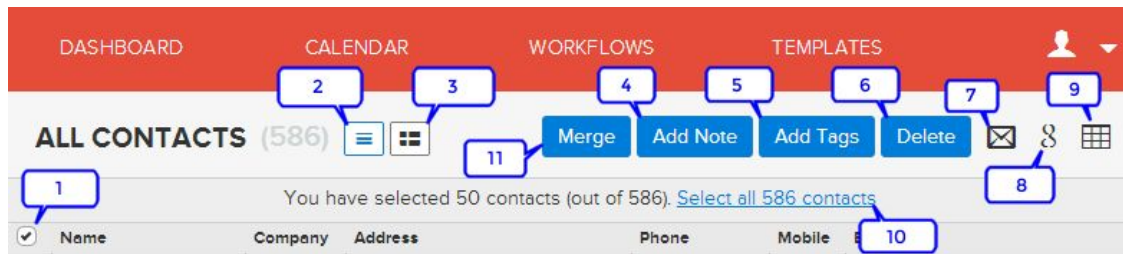
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OnBoard Day 7 - View All Contacts

On day 4, I briefly discussed tagging selected contacts in the **View All** screen. Today, I will show that screen in more detail.

Once again, click on the double chevron ">>" next to the Contact count to display the contacts from the list view. The image below shows the top section of the View All work pane, I've numbered each element to make it easier to describe.



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. **Add Note** - Adds a note to each selected contact.
5. **Add Tags** - Adds a tag or tags to each selected contact.
6. **Delete** - Deletes each selected contact and puts them in the trash. (**Settings > Trash**)
7. **Send Email** - Send an email to the selected contacts.
8. **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. This option allows you to print labels or letters using Google Docs. [Printing Labels Video](#) / [Printing Letters Video](#))
9. **Export to CSV** - Exports the selected contacts to a Comma Separated Values file.
10. **Select ALL** (link) - Selects ALL contacts even if they are not displayed in the current view.
11. **Merge** - 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. ([See Video](#))

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OnBoard Day 8 - Radar Tab

Today's training covers the filter buttons located in the Radar tab of a contact. The Radar shows streams of information about the contact including Notes, Emails, SMS Text messages, Facebook, Twitter and LinkedIn feeds. The stream 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 are light gray and turned OFF so they will not show in the radar tab.



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.

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OnBoard Day 9 - Contact Connections

The upper right corner of each contact has 6 icons which allow you to communicate with your contact through different social media networks. If the Social Network connections are setup, then the icon will be in dark gray. If the icon is light gray, then the Connection field for that social network has not been entered, then the icon will be in dark gray. Click on the dark gray icon to send a message through Facebook, Twitter, LinkedIn, Email and SMS Texts. The Elephant icon is for connecting an Evernote notebook to a Realvolve contact. When you setup a notebook connection, the 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 above 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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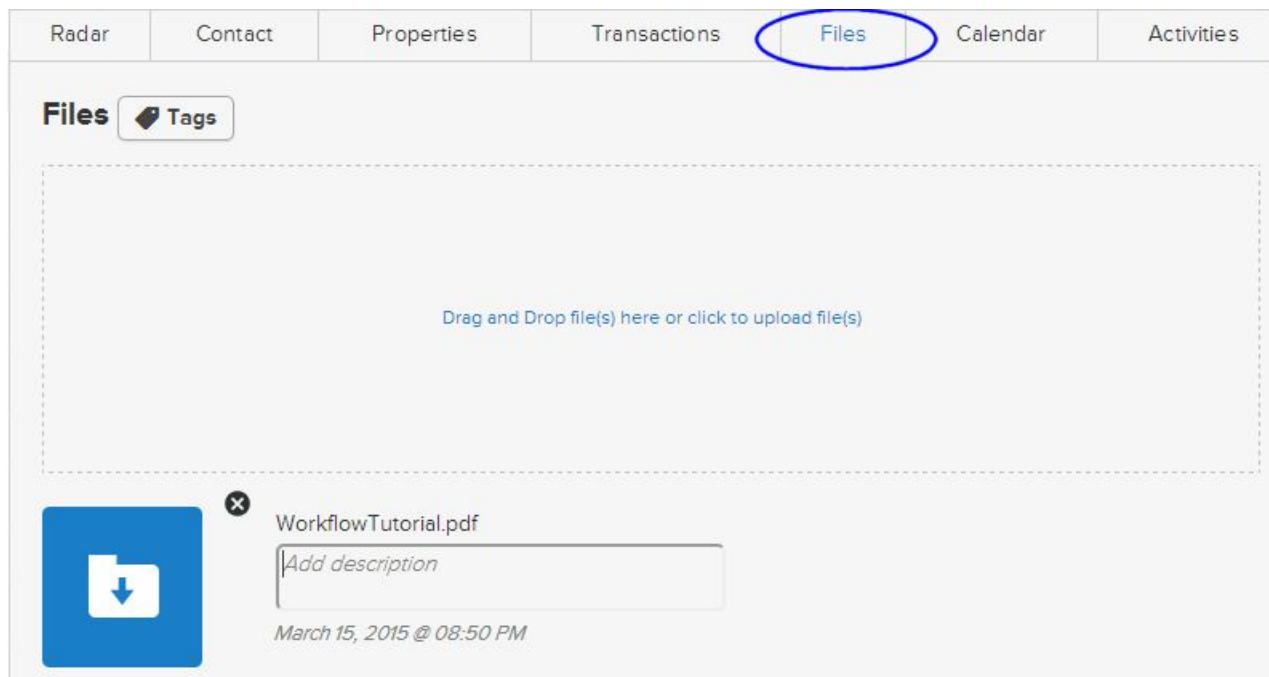
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OnBoard Day 10 - Files Tab

In today's training, I will explain the "Files" tab of Realvolve. You can load Image files, documents, spreadsheets and powerpoint presentations which are associated with the contact. Use 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

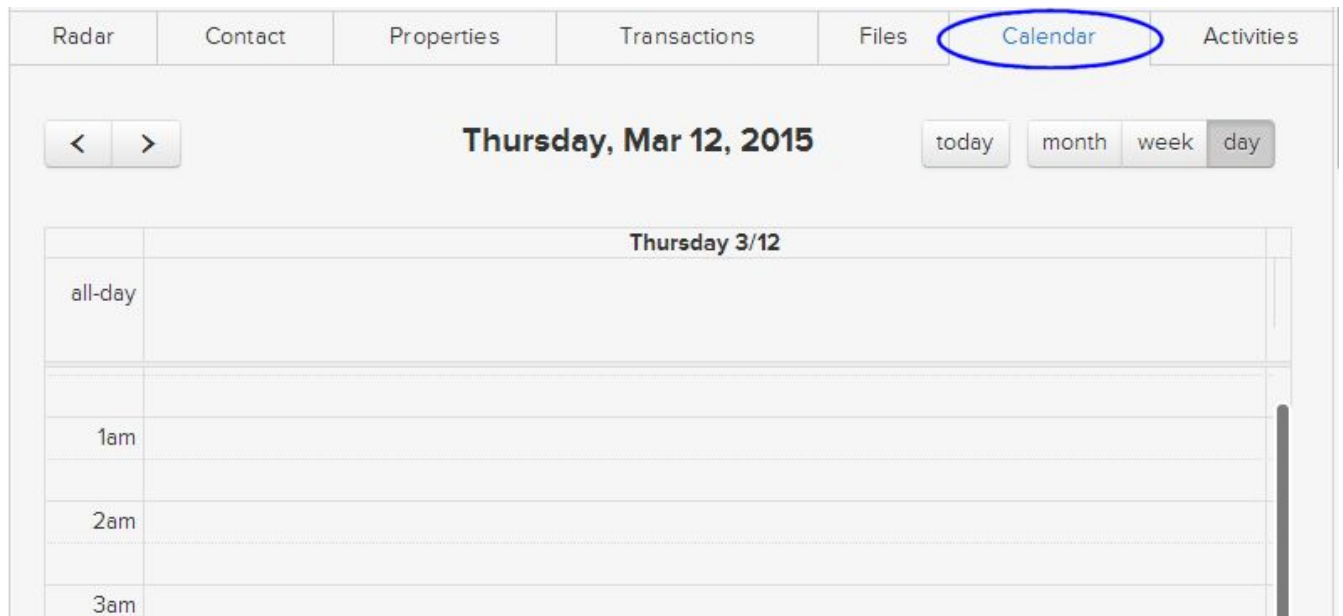
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OnBoard Day 11 - Calendar Tab

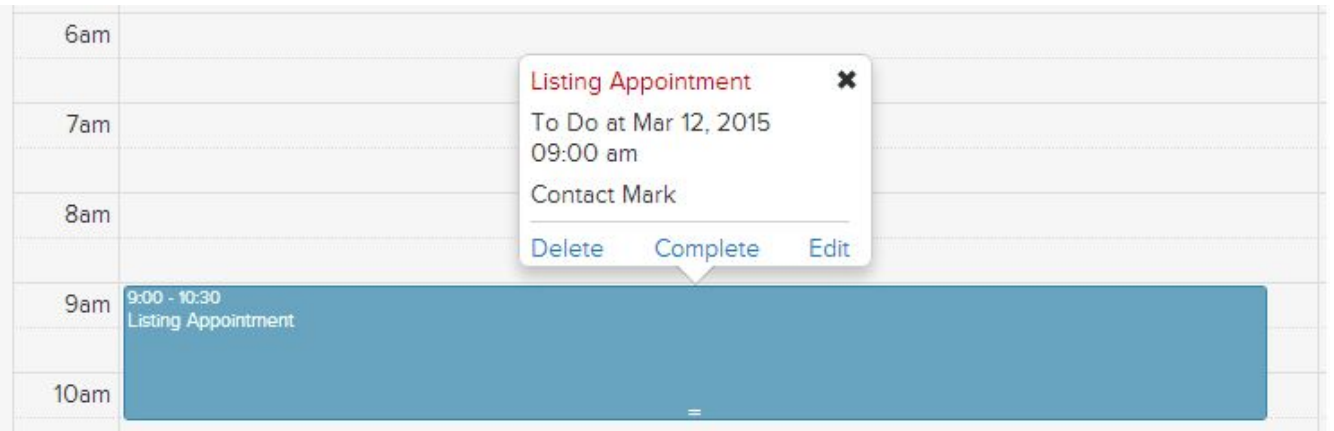
The **Calendar** tab is similar to the main Calendar located at the top of the screen except the appointments shown in the tab only applies to the selected contact. Use the left/right arrows on the left side of the calendar to move between dates. The Month, Week and Day buttons change the view of the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

A screenshot of a modal window for creating an appointment. It has a white background with a gray border. The fields are: 'Title for task' with the text 'Listing Appointment'; 'When' with the text 'Thu, 12 March, 09:00 - 10:30'; and 'Assign To' with a dropdown menu showing 'John Smith' and a small person icon. At the bottom right, there are two blue buttons: 'Cancel' and 'Create'.

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. 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

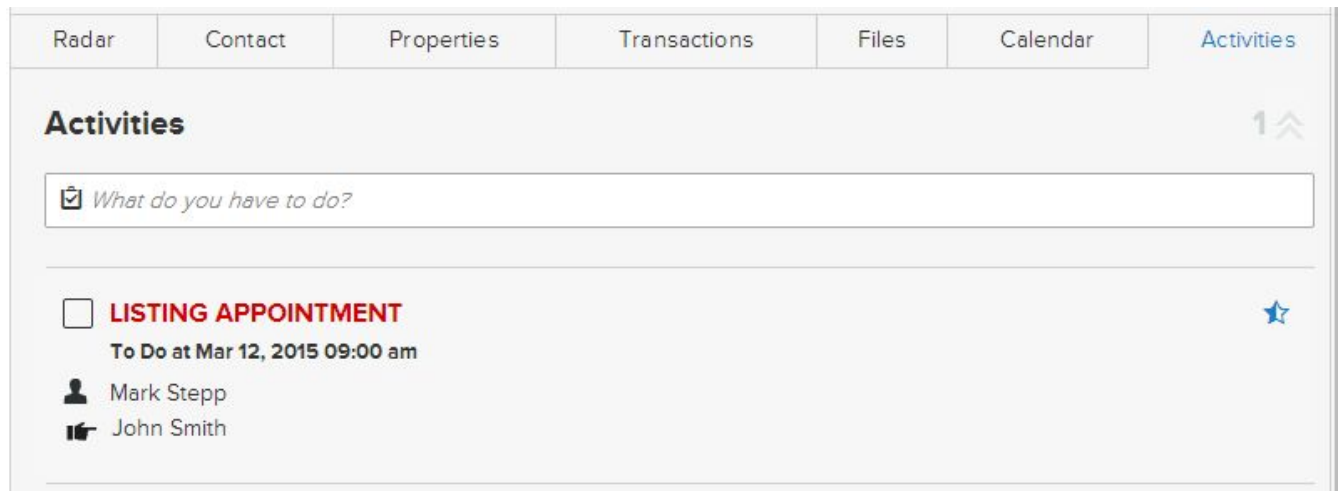
Questions?

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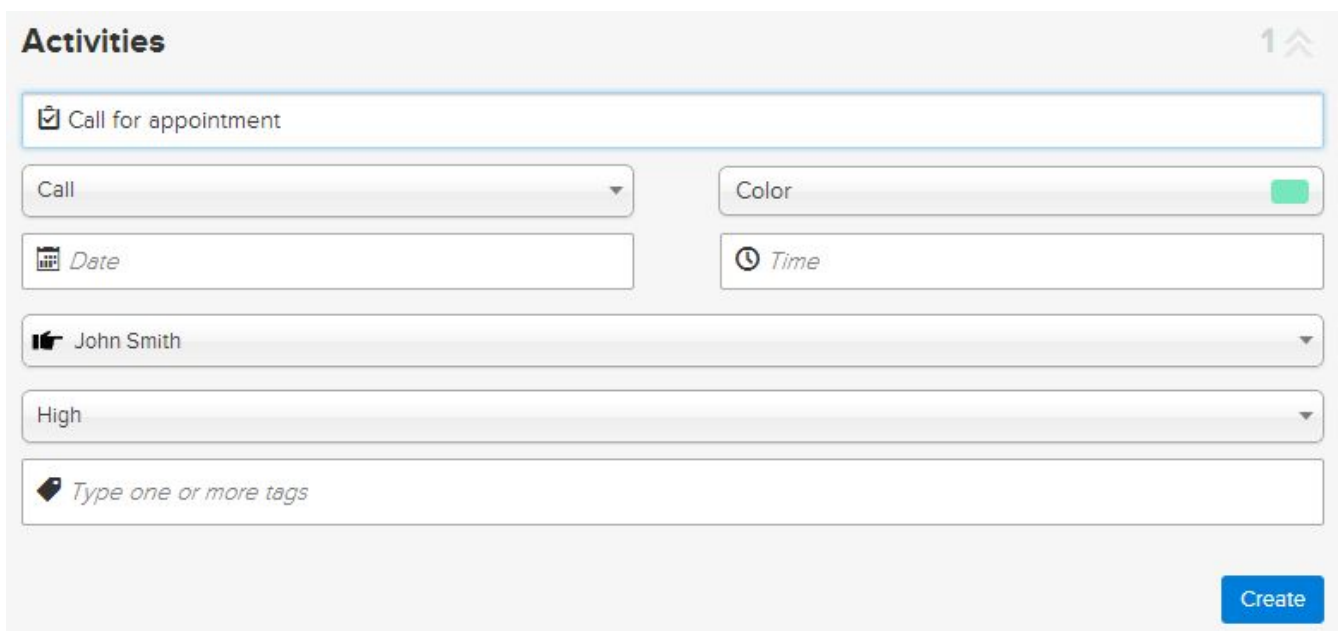
OnBoard Day 12 - Activities Tab

Today's training goes over the **Activities** tab which is similar to the Calendar tab that I discussed yesterday. It shows the activities and tasks in a list format based on its due date. Activities that are due or past due will show at the top of the list, completed activities will be listed at the bottom. In the example below, you can see the Listing Appointment that was added in yesterday's calendar training. Clicking in the Square box to the left of the Activity title will mark the activity as completed and move it to bottom of the list.



The screenshot shows the 'Activities' tab selected in a navigation bar. Below the tab, there is a header 'Activities' with a count '1' and an upward arrow. A search bar contains the text 'What do you have to do?'. Below the search bar, there is a list of activities. The first activity is 'LISTING APPOINTMENT' in red text, with a checkbox to its left. Below the title, it says 'To Do at Mar 12, 2015 09:00 am'. Below that, it lists 'Mark Stepp' and 'John Smith' with their respective icons. A star icon is to the right of the activity.

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.



The screenshot shows the 'Activities' tab with a search bar containing 'Call for appointment'. Below the search bar, there is a form to add a new activity. The form includes a dropdown menu for 'Call', a 'Color' dropdown menu with a green color selected, a 'Date' dropdown menu, a 'Time' dropdown menu, a dropdown menu for 'John Smith', a dropdown menu for 'High', and a text input field for 'Type one or more tags'. A 'Create' button is at the bottom right.

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?

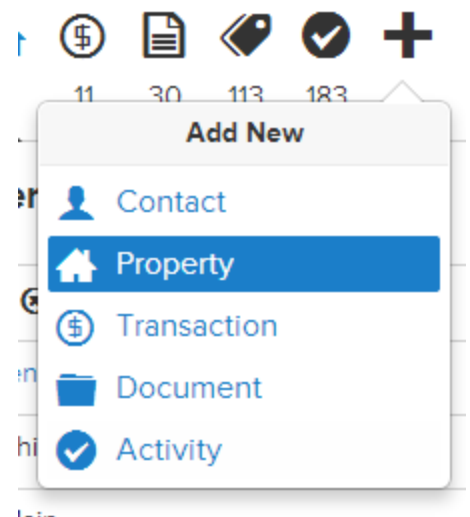
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OnBoard Day 13 - Adding Properties (Listings)

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, Sq Ft 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 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 you took for contacts in Training 3.. 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.

A screenshot of the 'Listing' tab in the Realvolve application. The form displays property details for '4190 S 135TH RD,...'. It includes fields for 'MLS', 'Listing Price' (\$100000), 'Listed' date (Feb 25, 2015), and 'Expires On' date (Jun 25, 2015). There is a 'Drag & Drop' area with a house icon and an 'Active' status dropdown. Below the form, there are tabs for 'Radar', 'Listing' (selected), 'People', 'Marketing', and 'Seller Reps'. The 'Board/MLS #' section has a dropdown menu set to 'Primary MLS' and a text input field containing '1234567'. An 'Add New' button is circled in blue next to the text input. There is also a 'Set as primary' checkbox which is checked, and 'Save' and 'Cancel' buttons at the bottom.

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 then click on the **People** tab to select the party members for the property using drag & drop from your contact database or manually enter the contacts if they do not currently 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. Each of this information can be include in your email templates by using the appropriate merge fields.

I will skip the **Seller Reports** tab for now, it will be discussed in the next email.

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 so refer to days **10**, **11** and **12** of training for detailed information.

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

Questions?

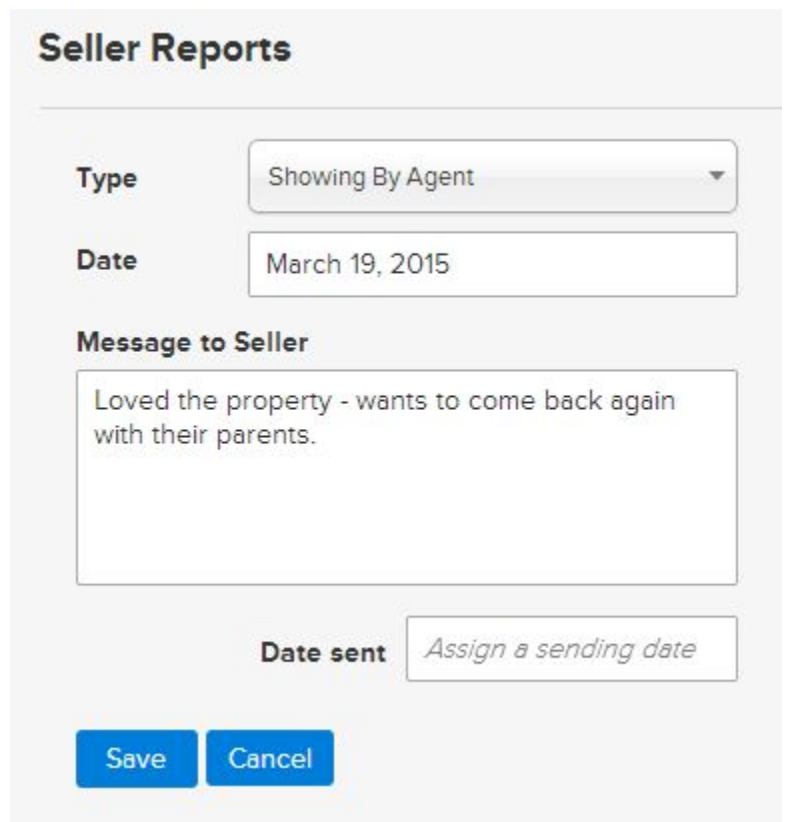
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OnBoard Day 14 - Seller Report Tab

In the previous training I discussed how to enter the basic information about properties that you have listed. In this session, I will cover the **Seller Reports** tab which 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 screenshot shows a web form titled "Seller Reports". It contains the following fields and controls:

- Type:** A dropdown menu currently showing "Showing By Agent".
- Date:** A text input field containing "March 19, 2015".
- Message to Seller:** A large text area containing the text "Loved the property - wants to come back again with their parents."
- Date sent:** A text input field with the placeholder text "Assign a sending date".
- Buttons:** Two blue buttons at the bottom, labeled "Save" and "Cancel".

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.

([SEE VIDEO](#))

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

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

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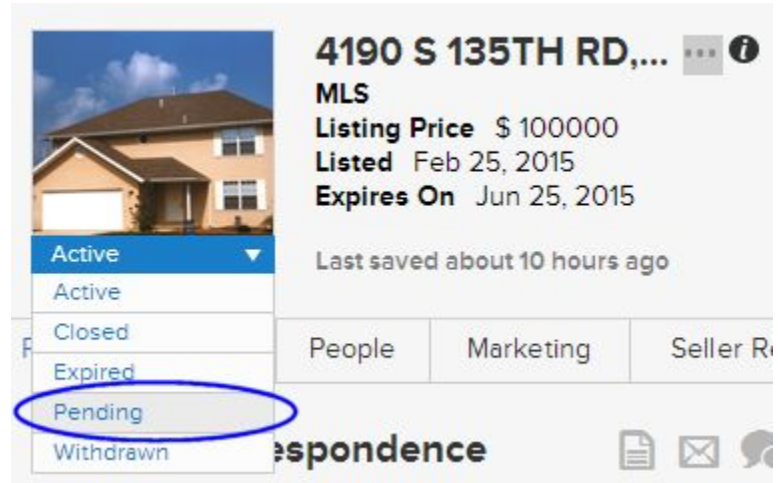
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The screenshot displays a user interface for managing contact information. At the top, there is a text input field labeled "Select Contact..." and a "Rating" dropdown menu currently set to "0". Below these are two large text areas: "Feedback" and "Agent Note". Each of these areas has a placeholder text "Add feedback" and "Add agent note" respectively, indicating where users can enter their comments or notes.

OnBoard Day 15 - Creating A Transaction

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 then 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, 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.

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. ([SEE VIDEO](#))

The **Files**, **Calendar** and **Activities** tabs are the same as those found in the **Contact** and **Properties** section which I covered on Days 10, 11 and 12.

Tomorrow I will cover the **Commissions** tab in detail so hang tight on it...

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OnBoard Day 16 - Commissions Tab

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** which I discussed yesterday, 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".

Agent Commission Split	%	<u>95.000</u>	
Total Commission	%	<u>6.000</u>	\$ <u>7,800.00</u>
List-Side Commission	%	<u>3.000</u>	\$ <u>3,900.00</u>
List-Side Referral	%	<u></u>	\$ <u></u>
Buy-Side Commission	%	<u>3.000</u>	\$ <u>3,900.00</u>
Buy-Side Referral	%	<u></u>	\$ <u></u>
E & O Insurance			\$ <u>75.00</u>
Brokerage	%	<u>5.000</u>	\$ <u>195.00</u>
Franchise	%	<u></u>	\$ <u></u>
Transaction Fee	 +	<u></u>	\$ <u>100.00</u>
<input type="text" value="Description"/>			\$ <u></u>
<input type="text" value="Description"/>			\$ <u></u>
<input type="text" value="Description"/>			\$ <u></u>
Closing Gift			\$ <u>75.00</u>
Net Commission			\$ <u>3,655.00</u>

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 3 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 an accurate amount.

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OnBoard Day 17 - Templates

It is now **Day 17** in your training, I have shown you how to customize your settings, how to add contacts, properties and transactions into the database as well as how to manually add items to the Calendar. You have learned most of data entry processes which are needed to move ahead. From this point forward, I will cover the automation aspects of Realvolve to help keep you organized and running like clockwork.

There are currently three modules that I consider as being part of the automation system of Realvolve which will be covered in the next few sessions.

1. **Templates:** The pre-written emails and text messages to send to contacts in the database.
2. **Workflows:** The pre-designed systems for handling your day-to-day processes.
3. **Google Sync:** The method of keeping the data in Realvolve in sync with other devices.

Today I will start by discussing what a template is and how to use them. A template is nothing more than a pre-designed **Email, SMS text, Facebook, Twitter or LinkedIn** message that can be sent to contacts at any time. Instead of writing a new message each time you communicate with your contact, simply pick a template containing the message you want to 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 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.

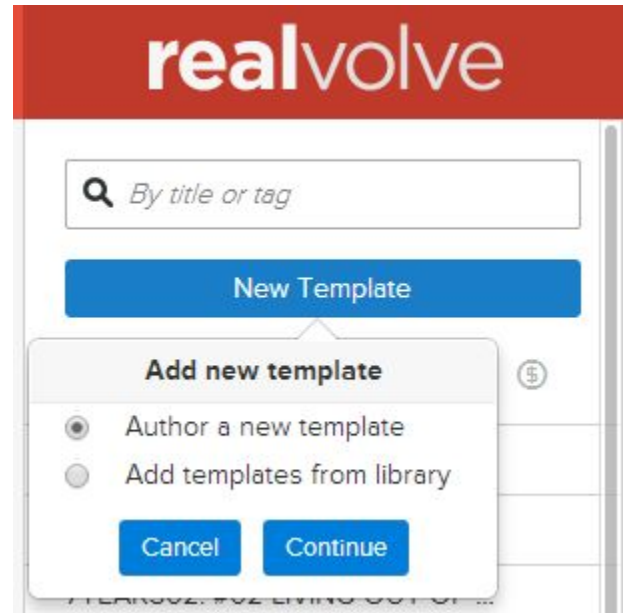
At the top of the Template Editor you must specify information in the following fields.

- **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 would recommend that you use keywords to help organize your templates from the beginning. Over time, you will create an extensive number of templates that could make it difficult to find without specific Keywords. Use Tags like “Thank You” for any type of Thank You letters or “Listing Expiration” for any templates dealing with expiration of a listing.

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 **WorkflowTutorial.pdf** for detailed instructions for setting up templates.

Merge Fields Explained ([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

Questions?

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OnBoard Day 18 - Signatures

Anytime you send out an email, it normally contains an area with your personal contact information located toward the bottom of the message known as a "Signature". Most people include information like Name, Job Title, Designations, Mailing Address, Email and Phone Numbers as well as a Photo and Company Logo in their signature. The challenge is that Signatures change over time which can be problematic when they are included in every template in your library. Having to edit each template and update the personal information every time it changes would be a real pain, especially if you have hundreds of templates in your system.

To solve this problem, Realvolve allows you to setup a special "Signature" template that can be used as your signature. When you want to include your signature in a document, simply insert signature merge field.

[[Signature]]

The image to the right shows a sample signature template that replaces the merge field shown above when the message is sent.



At that point, any changes to the signature can be done in one location and span across all documents that uses that merge field. Two additional merge fields of **Header** and **Footer** have similar benefits for those users wanting stationery like features in their emails.

How to setup a Signature ([SEE VIDEO](#))

How to setup a Header or Footer ([SEE VIDEO](#))

ACTION STEPS:

Create your own Signature, Header and Footer templates so they are ready to use when needed.

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Questions?

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OnBoard Day 19 - Workflow Streams

Now that you have created a few templates, I'll explain how to use them in an automated method using Workflow Streams.

What is a Workflow Stream?

A workflow stream is a pre-designed series of activities that is setup one time and used to automate typical business processes. Each activity in the workflow stream can be assigned a date based on criteria 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 of date fields for the criteria.

By creating your own workflow streams 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 workflow streams. 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 stream, the better.

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

By forcing yourself to following the activities on a day-by-day basis, it enables you to consistently give each client the same great service day in and day out. That great service translates to superior customer satisfaction and ultimately, more referrals and repeat business.

Realizing the power of the workflow in your day-to-day processes will save you time and keep you organized.

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.
- Facebook, Twitter or LinkedIn messages to contact.
- Automated data collection for staff.
- 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
- Special case options to branch to other workflows
- 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.

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Questions?

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OnBoard Day 20 - Example Workflow

Now that you have completed the example **New Listing Agreement** workflow outlined in the [WorkflowTutorial.pdf](#), you can 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:

- New Listings
- Closings
- Prospecting
- 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. 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 then 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 a email or message which must be sent, highlight that item to remind yourself to make a template as discussed on **Day 17**.

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

In the next training, you will create the workflows from the action steps above so be sure to complete your lists before tomorrow.

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OnBoard Day 21 - Building Your Own Workflow

In yesterday's training I gave you an assignment... Did you complete it? 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 stream 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

Questions?

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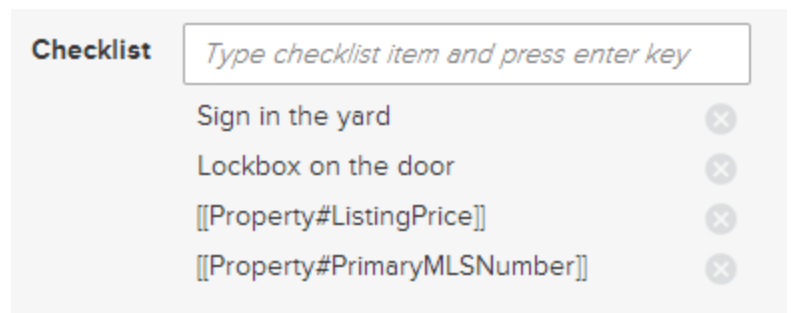
OnBoard Day 22 - Activity Checklists

Today's training will cover **Activity Checklists** and how to use them. It was described in yesterday's training video, but you may have missed it or just didn't understand how to use it, so I will go into more detail today.

What is a checklist?

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 completed. Other CRM systems require individual items for each checklist item but that clutters the screen. In Realvolve, multiple checklist items can be setup in a single activity as plain text like **"Sign in the yard"**, **"Lockbox on the door"** or can contain database fields, a unique feature of Realvolve, to view or edit the content of individual database fields.

The example below shows two plain text items and two database field items:

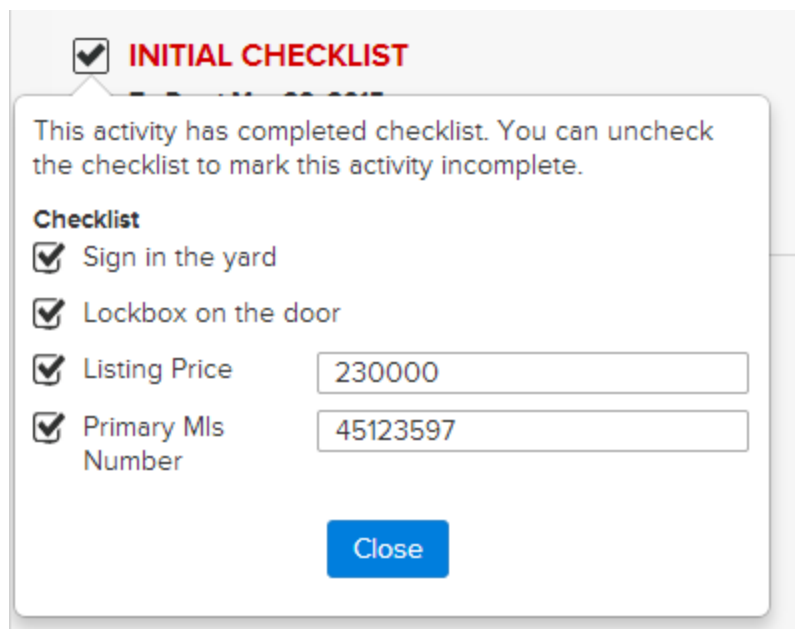


The screenshot shows a 'Checklist' section with a text input field containing the placeholder 'Type checklist item and press enter key'. Below the input field are four items, each with a small 'x' icon to its right: 'Sign in the yard', 'Lockbox on the door', '[[Property#ListingPrice]]', and '[[Property#PrimaryMLSNumber]]'.


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

For database field items, simply click into 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.



The screenshot shows a dialog box titled 'INITIAL CHECKLIST' with a checkmark icon. The text inside reads: 'This activity has completed checklist. You can uncheck the checklist to mark this activity incomplete.' Below this is a 'Checklist' section with four items, each with a checked checkbox: 'Sign in the yard', 'Lockbox on the door', 'Listing Price' (with a text input field containing '230000'), and 'Primary Mls Number' (with a text input field containing '45123597'). At the bottom right is a blue 'Close' button.

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 [**Close**] button to save the field values from the database checklist items.

The **Database 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 beginning users to validate fields easily.

NOTE: *The example above uses checklists **Without** Actions. I will cover checklists With Actions on Day 24.*

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.

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OnBoard Day 23 - Activity Actions w/o Checklists

Today's training will be over the **Action** feature.

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 but only 1 action is run at a time. For this training I will cover actions that **DO NOT** use checklists.

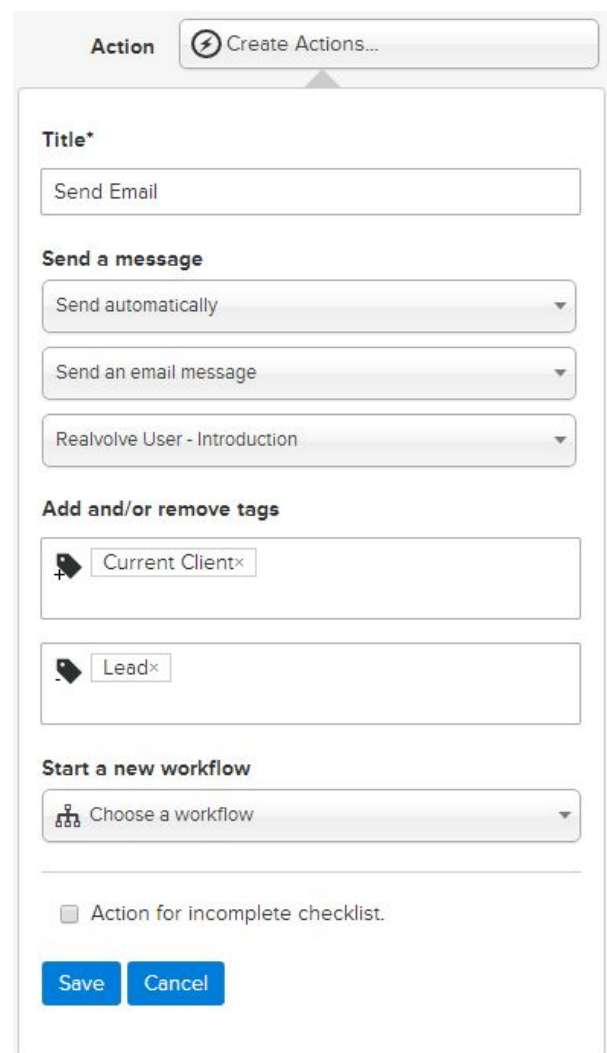
Click on the "**Create Actions...**" button to add an action to the activity. Each action is given a title which is used in a selection menu. If more than one action is added to an activity, the title needs to be descriptive enough to make a correct choice when the menu is displayed.

There are 3 possible automated functions of an Action:

- **Sending a message**
 - Email
 - Facebook
 - SMS Text
 - LinkedIn
 - Tweet
- **Add/Remove Tags**
 - Adding Tags
 - Removing Tags
- **Starting another Workflow**

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.



The screenshot shows the 'Create Actions...' dialog box. At the top, there is a tab labeled 'Action' and a button with a lightning bolt icon and the text 'Create Actions...'. Below this, the form is divided into several sections:

- Title***: A text input field containing 'Send Email'.
- Send a message**: Three dropdown menus. The first is set to 'Send automatically', the second to 'Send an email message', and the third to 'Realvolve User - Introduction'.
- Add and/or remove tags**: Two input fields. The first contains 'Current Client' with a tag icon, and the second contains 'Lead' with a tag icon.
- Start a new workflow**: A dropdown menu set to 'Choose a workflow'.

At the bottom, there is a checkbox labeled 'Action for incomplete checklist.' which is currently unchecked. Below the checkbox are two buttons: 'Save' and 'Cancel'.

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, Facebook, SMS Text LinkedIn or Twitter allows you to quickly engage with your customer without consuming large chunks of time writing them.

From the **Send a message** section there are 3 drop down menus:

The first menu allows you to select how you want to process the message being sent:

- **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.
- **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**
- **Facebook**
- **LinkedIn**
- **SMS**
- **Twitter**

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

ACTION: Workflow

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

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](#))

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OnBoard Day 24 - Activity Actions with Checklists

In the last training session, I explained Actions without 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 With 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.

☐ Action for incomplete checklist.

Save

Cancel

☒ Action for incomplete checklist.

Reschedule in days

Save

Cancel

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

The screenshot shows a 'Create Actions...' form with the following sections:

- Action**: A button labeled 'Create Actions...' with a lightning bolt icon.
- Title***: A text input field containing 'Request Missing Documents'.
- Send a message**: Three dropdown menus. The first is 'Send automatically', the second is 'Send an email message', and the third is 'Missing Documents'.
- Add and/or remove tags**: A section with two input fields. The first contains a tag icon and the text 'Missing Documents×'. The second contains a tag icon and the text 'Choose tags to remove'.
- Start a new workflow**: A dropdown menu with a workflow icon and the text 'Choose a workflow'.
- Reschedule**: A checkbox labeled 'Action for incomplete checklist.' which is checked. Below it is a text input field containing '3' followed by the word 'days'.
- Buttons**: Two blue buttons labeled 'Save' and 'Cancel'.

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.

☐ **INITIAL CHECKLIST**

This activity has a checklist. Please resolve each item in the list to finish this activity. You can also run one of the actions below to help complete this activity.

Checklist

☒ Signed Listing Agreement

☐ Signed Seller Disclosure

☐ Signed Marketing Plan Agreement

Available actions for an incomplete Checklist.

☒ Request missing documents *(0 runs)*

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

You Tube

The template below was used to create the email:

Template Editor

Title* Missing Documents

Tags  Assign one or more tags (optional)

Use with* Property

Via Email

Subject* Please forward the following documents

 Aa  a↑ **B** *I* U            

[[CurrentDate]]

[[Greeting]]

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.

[[Activity:Checklist#Incomplete]]

[[Signature]]

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

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Questions?

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OnBoard Day 25 - Branching

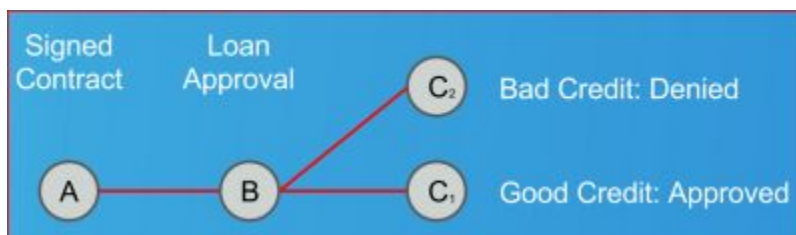
A typical action plan in other software takes you from point A to point G and reminds you of each tasks between. While that is good and necessary, the problem is that most transactions don't really work this way... There are hiccups that happen along the way forcing you to alter the plan. In most cases you have to manually change events to make it all work out and things can get missed.



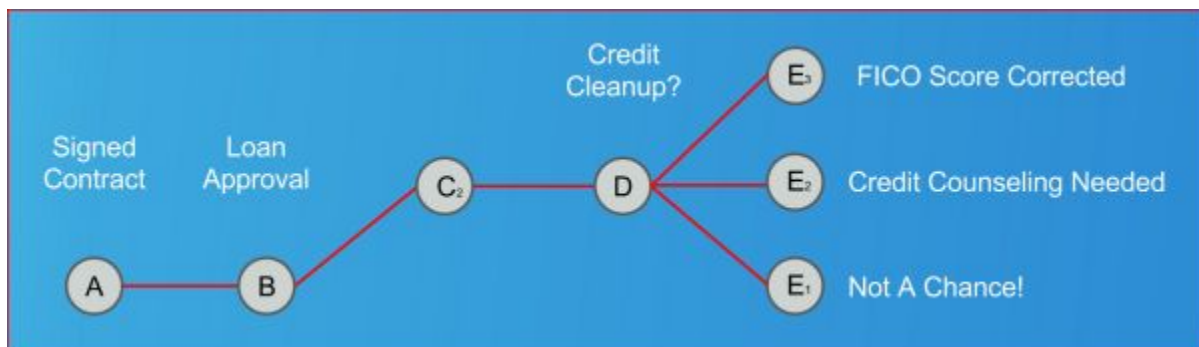
The last two training sections I touched on the concept of "**Branching**" which allows you to do more than a just a linear path shown above. It gives you a way to get from point A to point G but through a different route.

It is what I like to call an "**Alternate Reality**".

As an example, you might have a transaction workflow that starts out linear with a **Signed Contract** and get to **Loan Approval** but there is an issue. The Buyer has Bad Credit which prevents him from going the normal way to step D. This is where Branching comes into play...

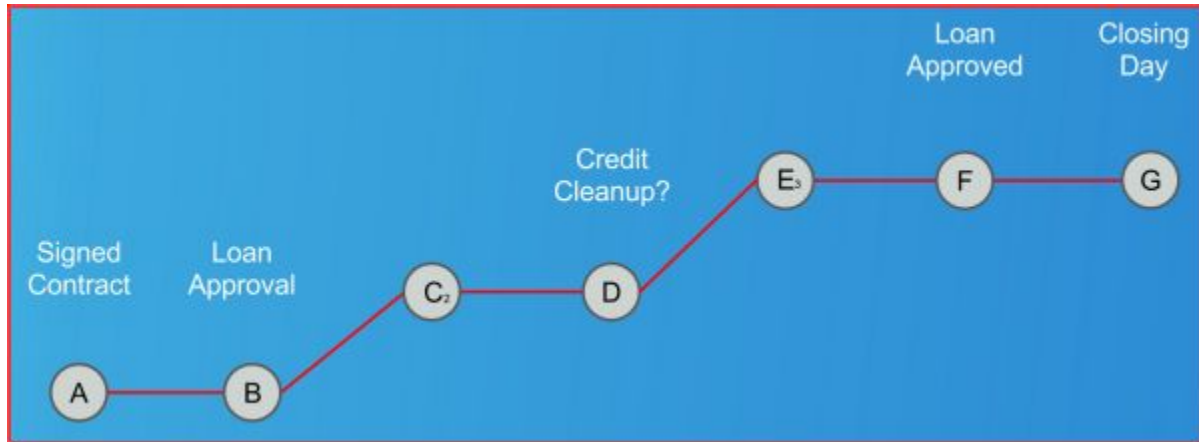


You can setup 2 Actions on one Activity and make a choice when you try to complete the activity. Action **C1** would continue through the process like a normal buyer but action **C2** would start a workflow to deal with the bad credit issue.



In this case you choose to run Action **C2**, a the "**Bad Credit Workflow**" which would kick in with a series of additional activities that prompts you through that process that allows for "**Credit Cleanup**".

Path **E1** might be needed if there is no possible way to continue... it's a bad buyer and the deal is dead so close out the process and start over. **E2** could be used if the buyer just needs a little credit counseling which would allow the process to finish once the counseling is complete. The **E3** option might happen if it was just incorrect reporting of the FICO score and a correction could be made with a simple phone call to continue on.

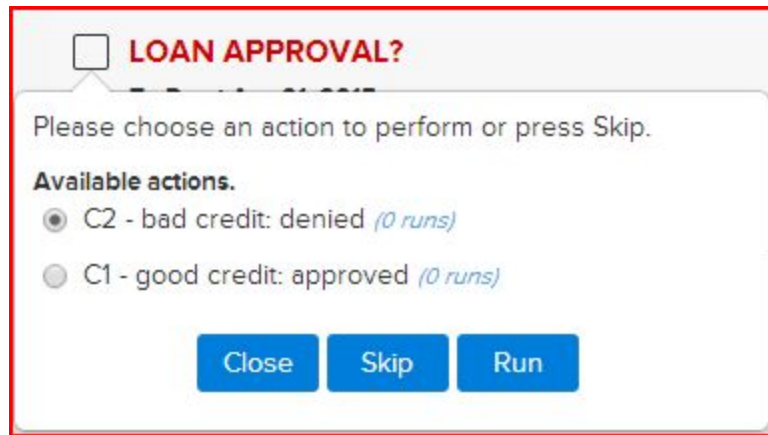


You are able to run Action **E3** which allows "**Load Approval**" to happen and ultimately reaching "**Closing Day**". The Realvolve workflows can handle different paths of processing, still going from point A to point G, to reach the ultimate goal.

Setting up this process is easy, using 2 Actions on 1 Activity. Each action launches a different workflow as needed. (you can have as many actions as needed in order to go to the next step)



When the activity comes due and you click the box to complete the task, a popup window showing the options of **C1** or **C2** as shown below. Choosing **C2 - bad credit: denied** would start the workflow for bad credit as described above then continue to the next step.



☐ **LOAN APPROVAL?**

Please choose an action to perform or press Skip.

Available actions.

☒ C2 - bad credit: denied *(0 runs)*

☐ C1 - good credit: approved *(0 runs)*

Refining each step in the process with as much detail as needed to take care of the steps required to finish the task will allow you to be more effective with your daily processes. Having a good plan to guide you through the hiccups like bad credit which happen on a regular basis will add customer confidence and satisfaction which leads to repeat business and referrals.

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Questions?

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OnBoard Day 26 - Starting A Workflow

We've been setting up workflows for the past few days and I'm sure you will continue to do so until all your processes are in place. The one thing I have not discussed is **STARTING** a workflow to get the activities into your calendar.

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



Typical Examples:

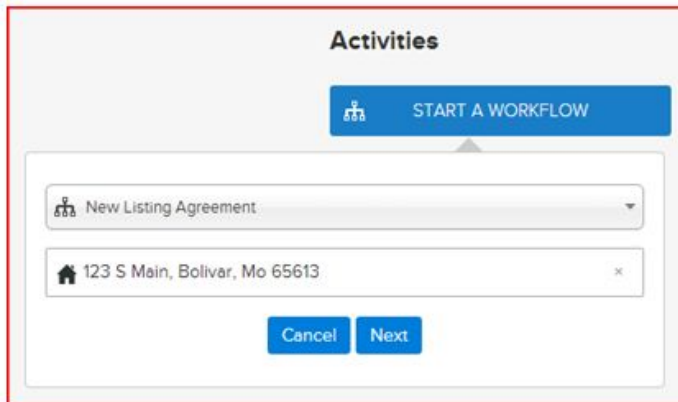
- After entering a new lead into the database you could go to the Radar tab of the contact and start a “**New Lead**” workflow.
- After adding a new Property, click on the radar tab and start a “**New Listing**” workflow.
- Once a transaction is created, click on the radar tab and start the “**Buyer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

What is the workflow wizard?

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



Activities

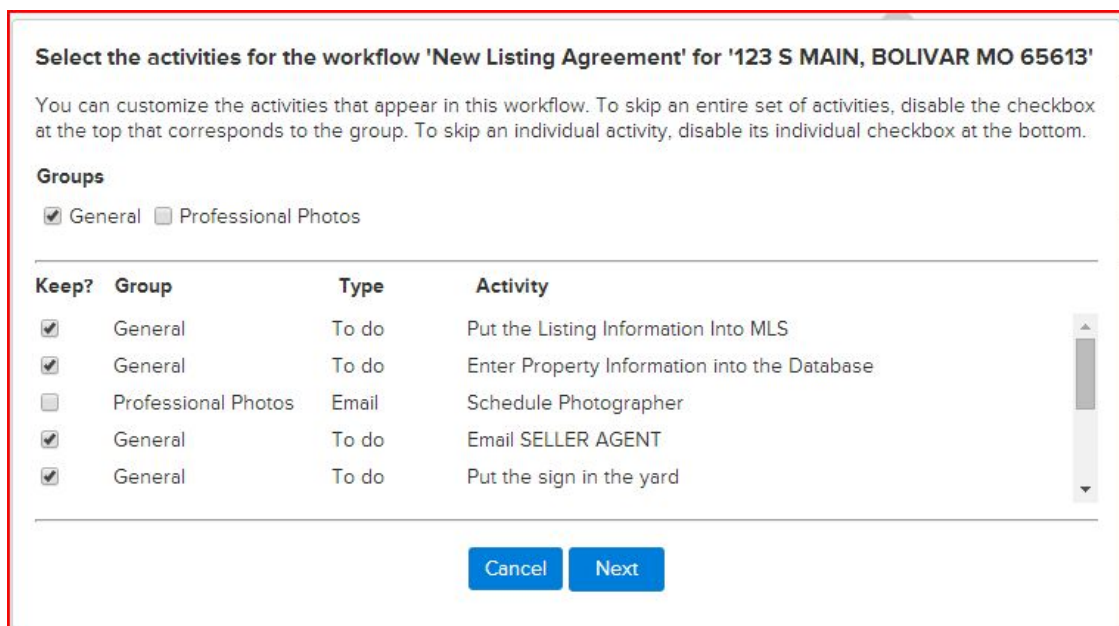
START A WORKFLOW

New Listing Agreement

123 S Main, Bolivar, Mo 65613

Cancel Next

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]**



Select the activities for the workflow 'New Listing Agreement' for '123 S MAIN, BOLIVAR MO 65613'

You can customize the activities that appear in this workflow. To skip an entire set of activities, disable the checkbox at the top that corresponds to the group. To skip an individual activity, disable its individual checkbox at the bottom.

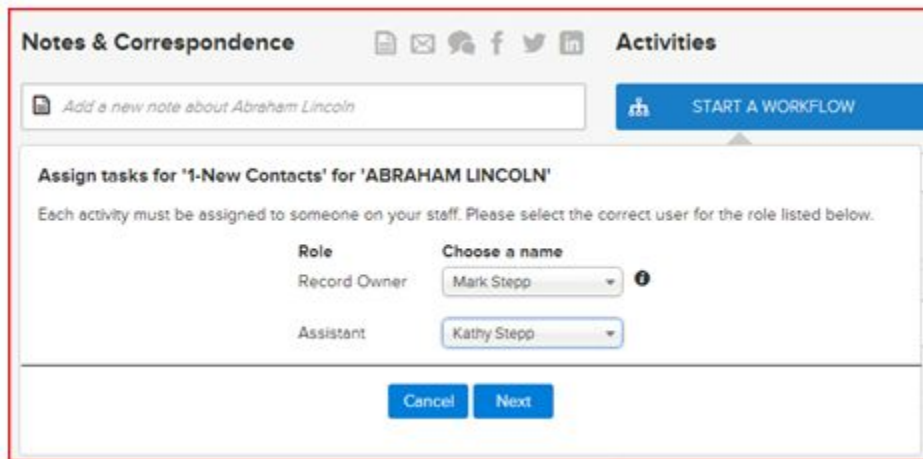
Groups

☒ General ☐ Professional Photos

Keep?	Group	Type	Activity
<input checked="" type="checkbox"/>	General	To do	Put the Listing Information Into MLS
<input checked="" type="checkbox"/>	General	To do	Enter Property Information into the Database
<input type="checkbox"/>	Professional Photos	Email	Schedule Photographer
<input checked="" type="checkbox"/>	General	To do	Email SELLER AGENT
<input checked="" type="checkbox"/>	General	To do	Put the sign in the yard

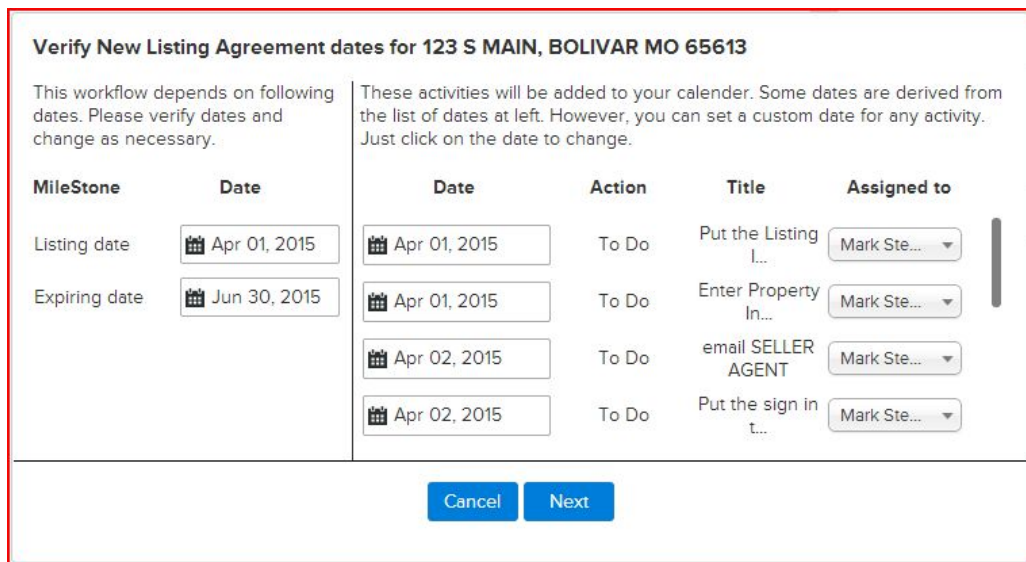
Cancel Next

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



The screenshot shows a web interface for assigning tasks. At the top, there's a header with 'Notes & Correspondence' and 'Activities'. Below the header, there's a text input field with the placeholder 'Add a new note about Abraham Lincoln' and a blue button labeled 'START A WORKFLOW'. The main section is titled 'Assign tasks for '1-New Contacts' for 'ABRAHAM LINCOLN''. Below this title, there's a instruction: 'Each activity must be assigned to someone on your staff. Please select the correct user for the role listed below.' There are two rows of assignment fields. The first row is for 'Record Owner' with a dropdown menu showing 'Mark Stepp'. The second row is for 'Assistant' with a dropdown menu showing 'Kathy Stepp'. At the bottom, there are two buttons: 'Cancel' and 'Next'.

6. Enter milestone dates to calculate individual activity dates.
7. * Changes to milestone dates will recalculate activity dates (Click in to the date field to adjust)
8. * Changes to individual activity dates are allowed as needed (Click in to the date field to adjust)
9. * Changes to individual “Assigned to” as needed (Click the drop down arrow to select a User)



The screenshot shows a web interface for verifying listing agreement dates. The title is 'Verify New Listing Agreement dates for 123 S MAIN, BOLIVAR MO 65613'. Below the title, there's a instruction: 'This workflow depends on following dates. Please verify dates and change as necessary.' There's a table with two columns: 'MileStone' and 'Date'. The first row is 'Listing date' with a date field showing 'Apr 01, 2015'. The second row is 'Expiring date' with a date field showing 'Jun 30, 2015'. To the right of the table, there's a instruction: 'These activities will be added to your calendar. Some dates are derived from the list of dates at left. However, you can set a custom date for any activity. Just click on the date to change.' There's a table with five columns: 'Date', 'Action', 'Title', and 'Assigned to'. The first row is 'Apr 01, 2015', 'To Do', 'Put the Listing I...', 'Mark Ste...'. The second row is 'Apr 01, 2015', 'To Do', 'Enter Property In...', 'Mark Ste...'. The third row is 'Apr 02, 2015', 'To Do', 'email SELLER AGENT', 'Mark Ste...'. The fourth row is 'Apr 02, 2015', 'To Do', 'Put the sign in t...', 'Mark Ste...'. At the bottom, there are two buttons: 'Cancel' and 'Next'.

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

Verify 'New Listing Agreement' parties for '123 S MAIN, BOLIVAR MO 65613'

This workflow depends on the following parties. Please verify the participants or change as necessary.

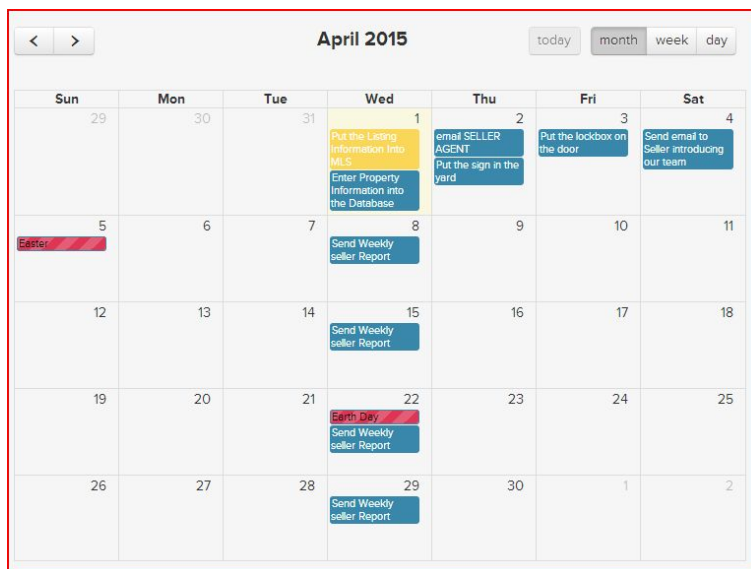
Party	Who
Seller	<input type="text" value="Don Smith"/>
Seller Agent	<input type="text" value="Jack Agent"/>

Each of the activities below affects one or more parties. To remove, change, or add parties to an activity, click on the appropriate button.

Title	Who
Put the Listing Information Into MLS	<input type="text" value="Don Smith"/>
Enter Property Information into the Database	<input type="text" value="Don Smith"/>
email SELLER AGENT	<input type="text" value="Jack Agent"/>
Put the sign in the yard	<input type="text" value="Don Smith"/>
Put the lockbox on the door	<input type="text" value="Don Smith"/>

< Back Cancel Done

11. 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.
12. Once all known party members have been selected then press **DONE** to complete the workflow wizard process which places the activities in the calendar.
13. You can now go to the calendar tab to view all activities that was added through the workflow.



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

Questions?

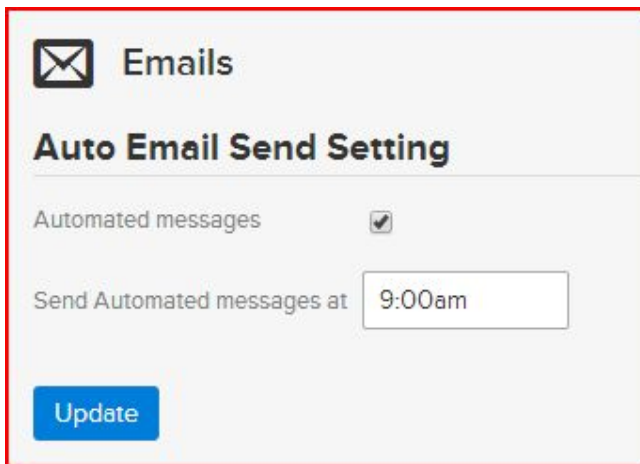
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OnBoard Day 27 - Auto-Email

Well, you have made it through the tough stuff... Workflows, Checklists, Actions and Branching and even starting the workflow so that the activities are in your calendar. The last important feature to cover is **Auto Sending**. Once you are rolling with actions on activities to send emails and messages, your calendar will start filling up with tasks that need to be done. Using Actions to automatically send message templates while you are away will free up your time. Allowing you to spend more time with your family and less time "working your database".

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

A screenshot of a web application's settings page for emails. The page has a light gray background. At the top left is an envelope icon followed by the word 'Emails'. Below this is a section titled 'Auto Email Send Setting'. Inside this section, there is a label 'Automated messages' followed by a checked checkbox. Below that is a label 'Send Automated messages at' followed by a text input field containing '9:00am'. At the bottom left of the section is a blue button with the word 'Update' in white text. The entire screenshot is enclosed in a red rectangular border.

Make sure the “**Automated messages**” option is **CHECKED (ON)** to allow the system to run automatically and that you have assigned a time of day for processing messages that are not assigned times.

Tasks that are assigned dates but not specific times will wait until the selected time before sending each day. If a task is assigned the current date and the time has already passed then it will send the

message at the next 10 minute interval. The example shown here will send tasks automatically at 9:00am in your selected time zone.

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

There are some **RULES** when setting up 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.

“Send Automatically” will send the message on the assigned day at the assigned time or default time.

“Send Immediately” will send the message as soon as the Activity is added to the calendar and automatically complete the activity. This is useful for the first activity of a workflow from a Zapier.com generated workflow.

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

Questions?

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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.

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 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

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OnBoard Day 29 - Importing Contacts

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 do 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 reimport 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.

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OnBoard Day 30 - Google Syncing

YOU MADE IT! The last day of training for new users!

I've waited to the last day for Google Sync training because I didn't want you to get all tied up with cleaning up contacts while you were going through the basic training. Many users get bogged down in the process of "cleanup" and won't continue training until everything looks just right. The purpose of the 30 day training is to give you a good overview of how Realvolve works so you know what it can do and hopefully I accomplished that goal. Today's training will show how to do a Google Sync and how to work around some of the obstacles of syncing.

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 it is setup, 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 on **Day 6** of our training:

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"**
 - In Realvolve, Syncing **"All Contacts"** (*Default*) will Sync **ALL** Google Contacts including 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, please check with support before making this mistake.
-

(PLEASE READ THROUGH ALL STEPS BELOW BEFORE DOING ANY OF THEM)

SYNCING CONTACTS:

1. If you have already imported contacts from another source 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 **"All Contacts"** above the **[Sync Now]** button 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. You may have many thousands of contacts in your database but only want a few hundred of your closest contacts to be sync'd. An easy way of doing this is to setup 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 "**All Contacts**" button and select the Group/Tag that you want to sync. Many users only want to sync to Google's "**My Contacts**", in that case you should choose the "**System Group: My Contacts**" from the drop down list to prevent the "**Other Contacts**" group in Google from syncing into Realvolve. The point is you have the option to choose what gets synchronized and it is best to decide before you sync them all.

5. **NOTE:** It's much easier to deal with limiting the sync'd contacts before hand than having clean-up afterward.
6. Press the [**Sync Now**] button to sync the Contacts for the first time.
7. 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.

While this may be the last day of training for this series, there is still plenty to learn - New features are getting added every 2 weeks so keep an eye open for additional training emails.

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