

Getting Started

As an Agent

Step 1

Start By Selecting Feedback from the left-side menu.

Step 2

Select **Form Design & Settings**

As an Office Manager

Step 1

Start By Selecting Feedback from the left-side menu.

Step 2

Select **Office Form Design**

Feedback Template Layout & Options

Feedback Templates can be created & configured on an office level and an agent level. Office level templates can only be modified by a user with office level settings. Agents can use predefined office templates on their listings or create & assign their own. The method to create & update templates is the same on the office and agent levels. At the Feedback Form Design screen, you will have the following options:

Clone - Allows you to copy the selected template

Rename - Allows you to change the name of the template selected

Delete - Removes the template selected

Create New Template - Creates a new (blank) template

Preview Survey - This allows you to see how the template will look with the chosen questions

Continued Page 2

Feedback Template Layout & Options

The screenshot shows a web interface for configuring a feedback form. At the top, there are two tabs: 'Settings' (active) and 'Feedback Form'. Below the tabs, the 'General Settings' section contains three options: 'Set as default agent template' (unchecked checkbox), 'When new feedback is received' (radio buttons for 'Hold for review' and 'Publish Automatically', with 'Hold for review' selected), and 'Feedback Sent by/Reply to' (radio buttons for 'Agent Email Address' and 'Office Email Address', with 'Office Email Address' selected). Below this is the 'Feedback Request Email' section, which includes a text area containing a sample email body. The 'Instructions Box' section follows, with a text area for instructions at the start of the survey. Finally, the 'Footer Text' section has a text area for text at the bottom of the survey.

Settings **Feedback Form**

General Settings

Set as default agent template: ☐

When new feedback is received: ☒ Hold for review ☐ Publish Automatically

Feedback Sent by/Reply to: ☐ Agent Email Address ☒ Office Email Address

Feedback Request Email

This text will be in the body of the Feedback Request Email

Thank you for your recent showing of our listing. We would appreciate it if you could offer us some quick feedback on your showing experience. Please click on the link below to answer a few quick questions. Thank you very much!

Instructions Box

These instructions will be at the beginning of the Feedback Survey

We would appreciate your customer's opinions and any additional comments you may have. Thank you very much for your assistance!

Footer Text

This text will be at the bottom of the Feedback Survey

Thank you for your assistance! Please click "Submit" below to send us your feedback.

General Settings - Basic settings for how feedback will be driven on the current template.

Set as default agent template - This will set the current template as the default for all future listings. When imported from the MLS, a listing will use the selected template. Under the **Feedback Template** dropdown, an asterisk (*) will notate the default template.

When new feedback is received - Changes how the system should handle new feedback. Should we publish it automatically to your owner or allow you to hold it for review and manage the feedback yourself?

Feedback Sent by/Reply to - This allows you to modify who the email requests are sent from/on behalf of.

Feedback Request Email - This text will only be visible in the feedback request emails to the showing agent.

Instructions Box - Instructions located at the beginning of the Feedback Survey.

Footer Text - The text at the bottom of the Feedback Survey.

Adding & Removing Questions

1 Feedback Form

Questions

To get started, select a question from the right hand side to begin creating the new template

2

+ Add Question

Add Multiple Choice Question

Add Free Text Question

Step 1

Select the Feedback Form tab at the top.

Step 2

Choose either of the two available question types.

Multiple Choice Questions

1. Multiple Choice Question 1

Multiple Choice Response 1

Multiple Choice Response 1

Multiple-choice Questions should always start with the question at the top. Using the buttons to the right of the response section, any number of responses can be added or removed.

- Used to **Add** a Response

- Used to **Remove** a Response

Free Text Questions

1. Free Text Question 1

Free Text Field

Free Text Questions can be any question that you would like the agent to provide a detailed response to. Keep these questions open-ended to provoke more than a yes or no answer.

Removing Questions

- Selecting this icon will remove any unwanted questions from the template.

Re-ordering Questions

- When your cursor changes to this, you can click and drag it to reorder the questions.

Adjusting the Feedback Request Frequency

As an Agent

ShowingTime[™] for the MLS

Alison Townsend (2003013430)

1 My Agent Setup

My Agent Setup

Feedback

Reports

Profile Basics

First Name: Al

Last Name: To

(1)

-- Phone Type --

-- Phone Type --

Fax:

Email: at

Text Message:

Calendar Sync

Mass Add Listing Note

Resend Login

2 Listing Agent Preferences

Allow Agents To Request

Def:

Notifications for Appointme

Step 1

Start By Selecting **My Agent Setup** from the left-side menu

Step 2

Scroll down until you see the section labeled Listing Agent Preferences; under that section is a sub-section labeled **Feedback Requests**.

As an Office Manager

ShowingTime[™] for the MLS

Office Feedback Settings

Send requests to agents w

Number of times to resen

Number of day

Home

Showings

Listing Setup

Agent Setup

Office Setup

1 Feedback

Manage Feedback

Office Form Design

2 Office Feedback Settings

Reports

Step 1

Start By Selecting **Feedback** from the left-side menu

Step 2

Select **Office Feedback Settings**

Feedback Requests

Send feedback requests to agents who showed my listings: ☒ Yes ☐ No


Number of times to resend feedback requests: 4 ▾

Number of days between resends: 1 ▾

You will be presented with three options regarding the frequency of your feedback requests. Choose the options that best determine your feedback request frequency.

1. Send feedback requests to agents who showed my listings
2. Number of times to resend feedback requests
3. Number of days between resends

Assigning a Template to a Listing



- Home
- Showings
- 1 Listing Setup**
 - Listing Setup
- My Agent Setup
- Feedback
- Reports

Search for a Listing

Search: Found 3 results in 3ms.

Address, MLS, and/or MLS Listing # [Advanced Search](#)

Search Archived Listings: ☐

MLS Code	MLS Number	Listing Agents	Owners	Address	City	Zip	Subdivision	MLS Status	In-House Status	Listing Price
ST_DEMO	4577446	Alison Townsend (2003013430)		17 East Hanna Ln.	Cleveland	44108		ACTIVE		\$2,995,000
ST_DEMO	1230000	Alison Townsend (2003013430)		130 Lakehurst Dr.	Cleveland	44108		ACTIVE		\$2,650,000
2 EMO	4586442	Alison Townsend (2003013430)	Damon Hurt	4540 Mastadon Dr.	Cleveland	44108		ACTIVE		\$875,000

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Step 1

Start By Selecting **Listing Setup** from the Left side menu

Step 2

Select the Listing for which you want to assign the feedback template.

The Feedback Template option is located in the Appointment Settings section. Use the selector to select the feedback template to assign to the listing.

Appointment Settings

Appointment Type:

Feedback Template: