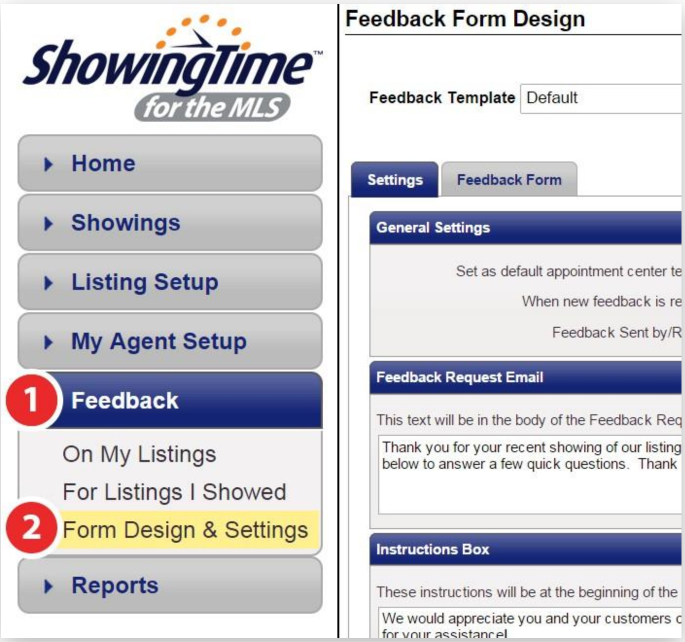
PROFESSIONAL FEEDBACK - TEMPLATES

Getting Started

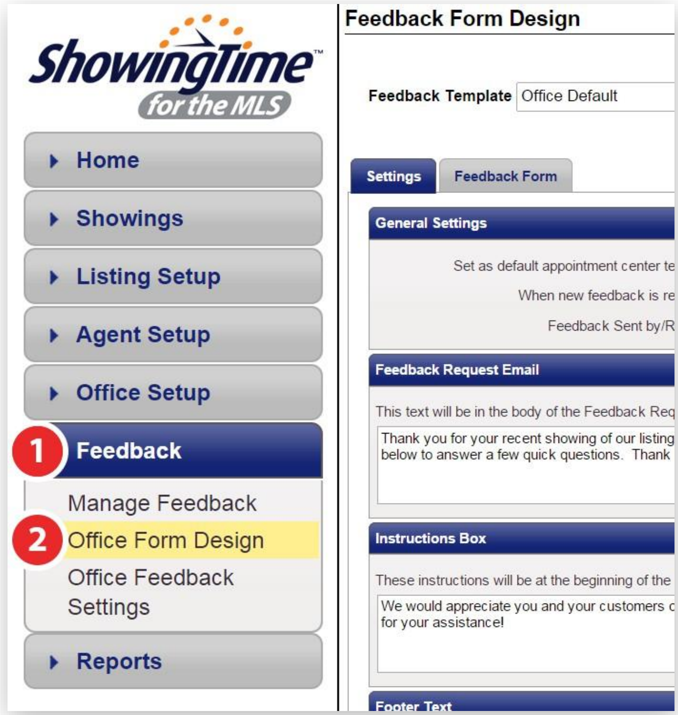
As an Agent



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

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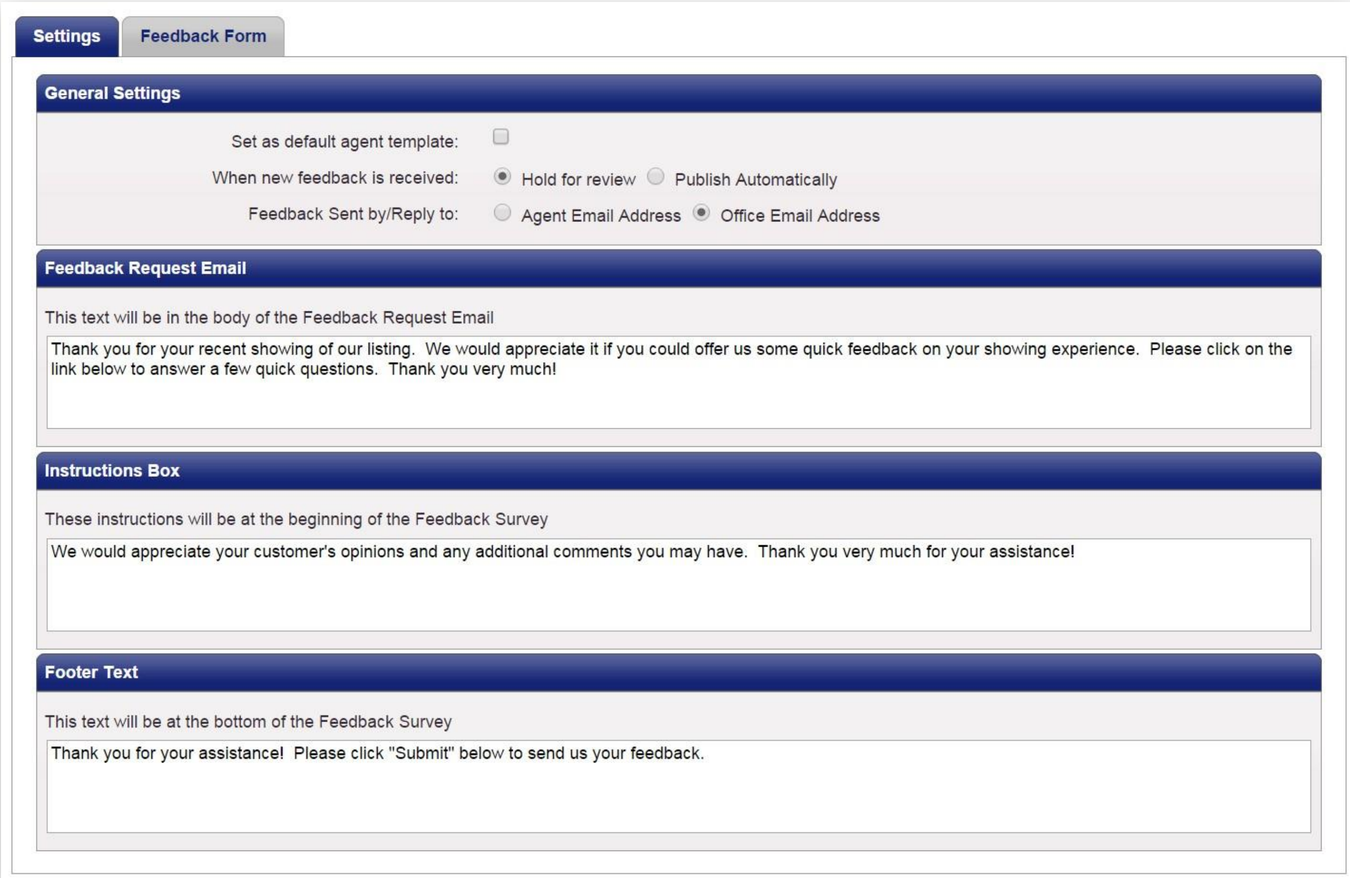
Feedback Template Layout & Options



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.

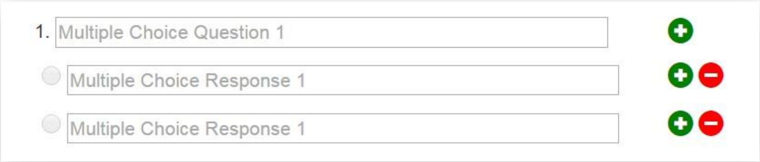
Footer Text - The text at the bottom of the Feedback Survey.

Adding & Removing Questions

Step 1
Select the Feedback Form tab at the top.

Step 2
Choose either of the two available question types.

Multiple Choice Questions



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

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.

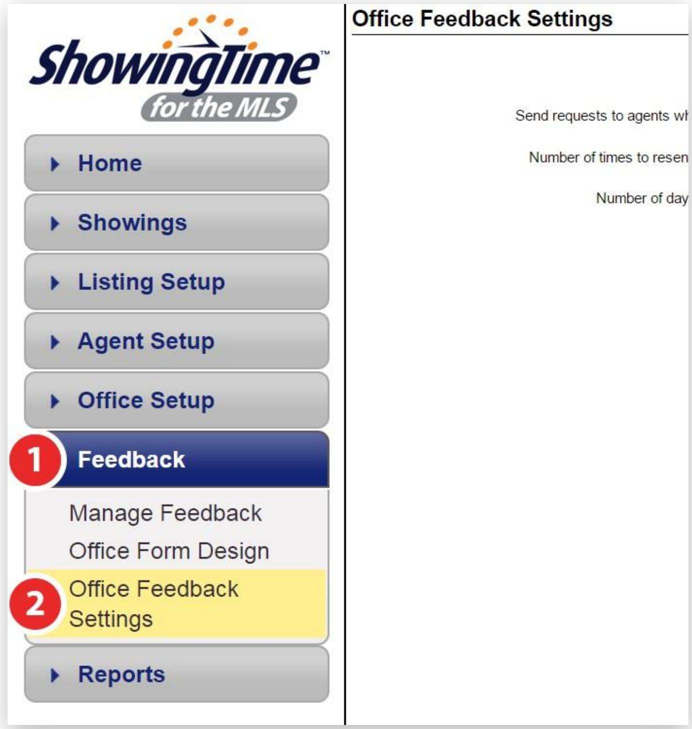
Adjusting the Feedback Request Frequency

As an Agent

Step 1
Start By Selecting **My Agent Setup** from the left-side menu

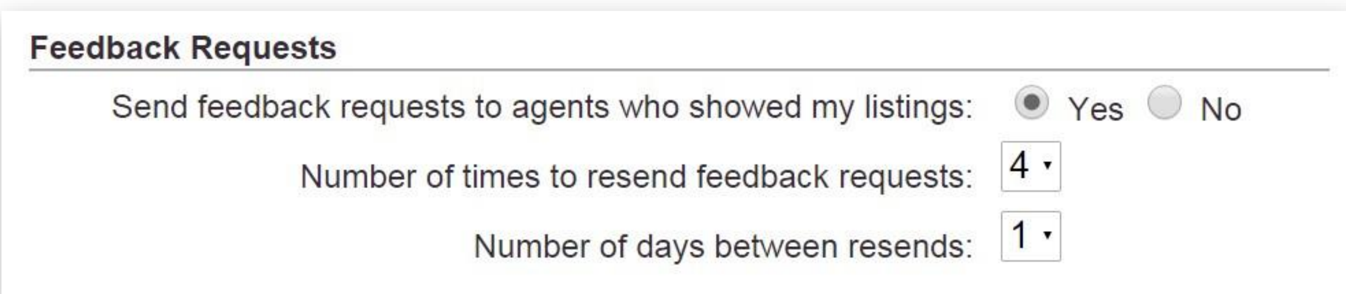
Step 2
Scroll down until you see the section labeled Listing Agent Preferences; under that section is a sub-section labeled **Feedback Requests.**

As an Office Manager



Step 1
Start By Selecting **Feedback** from the left-side menu

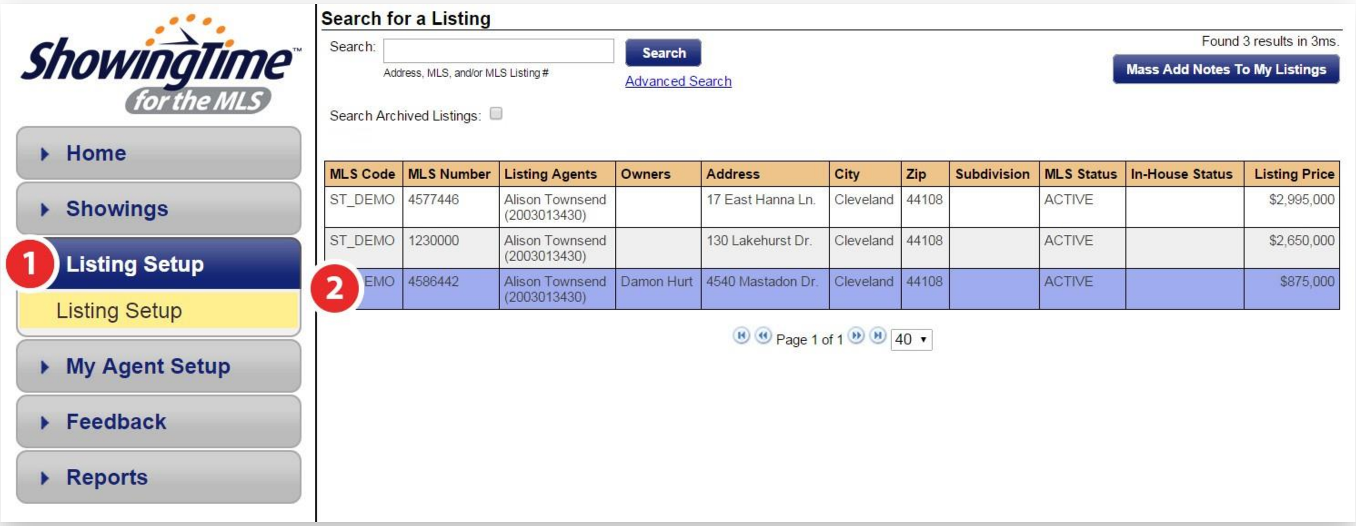
Step 2
Select **Office Feedback Settings**



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



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.