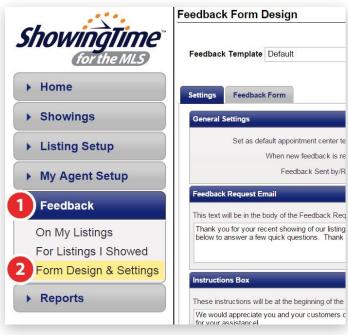
Getting Started

As an Agent



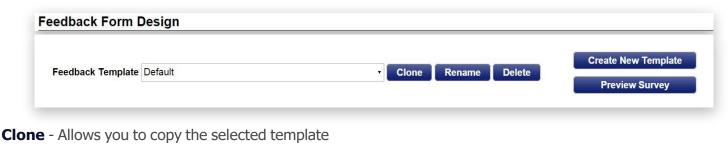
Step 1

Start By Selecting Feedback from the left-side menu.

Step 2 Select Form Design & Settings

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:



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



Step 1

Start By Selecting Feedback from the left-side menu.

Step 2 Select Office Form Design





As an Office Manager

Feedback Template Layout & Options

	ngs
	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
eedback Re	quest Email
his text will k	e in the body of the Feedback Request Email
	r 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 answer a few quick questions. Thank you very much!
nstructions	Box
hese instruc	ions will be at the beginning of the Feedback Survey
We would ap	preciate your customer's opinions and any additional comments you may have. Thank you very much for your assistance!
ooter Text	
	e at the bottom of the Feedback Survey
his text will k	r 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

stions		Add Question Add Multiple Choice Question
		Add Free Text Question
To get started, sel	ect a question from the right h creating the new template	and side to begin

Step 1

Select the Feedback Form tab at the top.

Multiple Choice Questions

1. Multiple Choice Question 1	•
Multiple Choice Response 1	00
Multiple Choice Response 1	00

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

Removing Questions

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

Step 2

Choose either of the two available question types.

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.

Re-ordering Questions

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



As an Office Manager

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.**

Office Feedback Settings ShowinaTime Send requests to agents wh Number of times to resen Home Number of day Showings Listing Setup Agent Setup Office Setup Feedback Manage Feedback Office Form Design Office Feedback Settings Reports

Step 1

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

Step 2

Select Office Feedback Settings

Send feedback reques	ts to agents who showed my listings:	🖲 Yes 🔵 No
Number o	f 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

for the MLS		ived Listings:	1	Search Advanced S	earch					Found Mass Add Notes T	3 results in 3ms o My Listings
ne 🛛	/LS Code	MLS Number	Listing Agents	Owners	Address	City	Zip	Subdivision	MLS Status	In-House Status	Listing Price
s	ST_DEMO	4577446	Alison Townsend (2003013430)		17 East Hanna Ln.	Cleveland	44108		ACTIVE		\$2,995,000
IP S	ST_DEMO	1230000	Alison Townsend (2003013430)		130 Lakehurst Dr.	Cleveland	44108		ACTIVE		\$2,650,000
	EMO	4586442	Alison Townsend (2003013430)	Damon Hurt	4540 Mastadon Dr.	Cleveland	44108		ACTIVE		\$875,000
Setup ent Setup ack					🖲 🖲 Page 1 d	of 1 🛞 🖲 🛛	10 •				
ts											

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:	Appointment Required
Feedback Template:	Default •

