



# SHOWINGASSIST™ MANUAL

REVISED JUNE 2007

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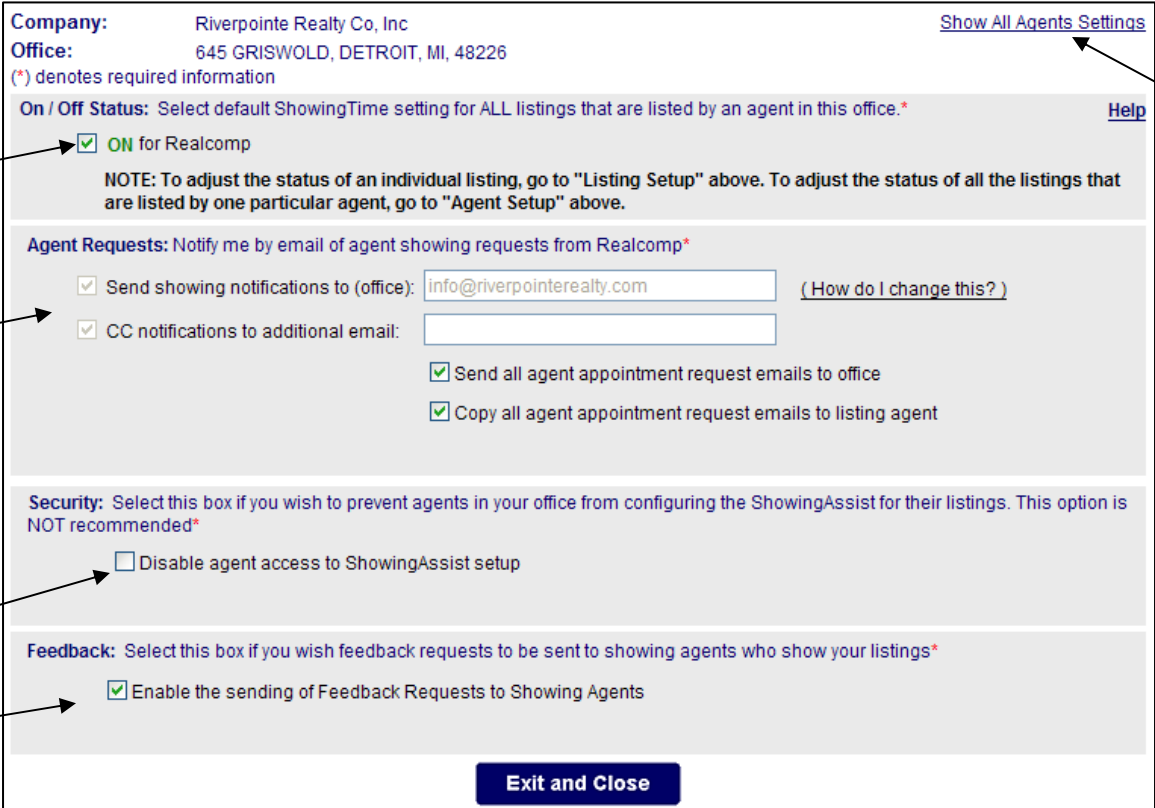
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## Setup for Brokers and Office Assistants

Before an office can begin using ShowingAssist on their listings, the broker should review the office's settings for Showing Assist. To do so, the broker or office assistant can go to their **Office Admin** menu and select **Office Preferences**. On the Office Preferences page, click the ShowingAssist button at the top of the page to access the configuration page.



From the Office Setup tab, you can select the office-wide settings.



The screenshot shows the "ShowingAssist" configuration page for Riverpointe Realty Co, Inc. The page is divided into several sections: "On / Off Status", "Agent Requests", "Security", and "Feedback".

- On / Off Status:** A checkbox labeled "ON for Realcomp" is checked. A note below states: "NOTE: To adjust the status of an individual listing, go to 'Listing Setup' above. To adjust the status of all the listings that are listed by one particular agent, go to 'Agent Setup' above." A "Help" link is visible.
- Agent Requests:** A section titled "Agent Requests: Notify me by email of agent showing requests from Realcomp\*" contains several options:
  - Send showing notifications to (office): info@riverpointerealty.com (How do I change this?)
  - CC notifications to additional email: [empty text box]
  - Send all agent appointment request emails to office (checked)
  - Copy all agent appointment request emails to listing agent (checked)
- Security:** A section titled "Security: Select this box if you wish to prevent agents in your office from configuring the ShowingAssist for their listings. This option is NOT recommended\*" contains a checkbox for "Disable agent access to ShowingAssist setup" which is unchecked.
- Feedback:** A section titled "Feedback: Select this box if you wish feedback requests to be sent to showing agents who show your listings\*" contains a checkbox for "Enable the sending of Feedback Requests to Showing Agents" which is checked.

At the bottom of the page is a blue button labeled "Exit and Close".

Numbered callouts (1-5) point to specific elements: 1 points to the "ON for Realcomp" checkbox; 2 points to the "Send showing notifications" checkbox; 3 points to the "Disable agent access" checkbox; 4 points to the "Enable the sending of Feedback Requests" checkbox; 5 points to the "Show All Agents Settings" link in the top right corner.

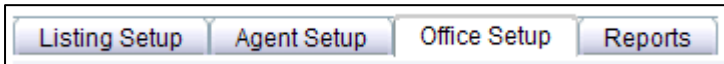
1. **On/Off Status** – Checking the “On” box will turn on ShowingAssist for ALL of the office’s listings. When a new listing is added, the ShowingAssist link will automatically appear. If it says “Off” next to the check box, then placing a check in the box will change it to “On”. Unchecking the “On” box will change it to “Off”
2. **Agent Requests** –
  - a. The default email address comes from Realcomp *Online*<sup>®</sup>. It is the office email address from the Office Information page.
  - b. The additional email address can be modified here, if an additional notification is needed or if the desired email address for notifications is different from the main office email address.

- c. “Send all agent appointment request emails to office” should be checked if the office should be notified, via email, about all appointments.
  - d. “Copy all agent appointment request emails to listing agent” should be checked if the agent should be copied on all appointment request emails.
3. **Security** – if you want the office to be the only ones to access the ShowingAssist setup, then this box can be checked. Otherwise the agents can turn on listings, edit the email addresses to which notifications are sent and configure times that the property is available for showings themselves.
4. **Feedback** – If this option is enabled, then a feedback request email is sent out to the showing agent of the property on the evening of the day that they requested to see the property. When they click on the email they get a box to enter feedback and then the listing agent/broker is notified of the new feedback waiting for them. The feedback can be viewed from the Listing Activity report and Agent Activity report on the "Reports" tab. The system won't send these feedback requests if the office is a ShowingDesk user (even if the checkbox is checked), as ShowingDesk sends its own feedback requests and this would cause the showing agent to receive duplicate requests.
5. **Show All Agents Settings** – Click this link to see the ShowingAssist settings for all agents in the office. The report has columns to display that agent’s name, their email address, phone number, current on/off status of ShowingAssist on their listings and a **Change** link to access that agent’s setup information to make changes or see additional information. When finished with this report, click the **Back to Office Settings** link to return to the previous screen.

When you have completed the setup on this page, please click the **Exit and Close** button to save changes and return to Realcomp *Online*<sup>®</sup>.

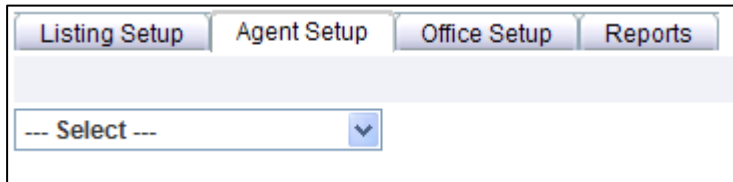
## Setup for individual agents or specific listings

Brokers and office assistants can also provide assistance in setting up the defaults for individual agents or specific listings by clicking one of the tabs at the top of the office setup screen.



### Agents

To view the settings for an individual agent, click on the **Agent Setup** tab and select the agent's name from the drop-down list.



This will display the Agent Setup page to make changes for this agent. This is the same page that is available for each agent on their My Preferences Page in the Agent menu. See page 4 for Agent Setup information.

### Listings

To view the settings for a specific listing, click on the **Listing Setup** tab and select the desired listing. See page 6 for more instructions on editing the listing's options.

## Set up for Agents

Before using the ShowingAssist functions, each agent should take a look at the options that are available to them. To access the agent setup screens, select **My Preferences** from the **Agent** menu and click the “**ShowingAssist**” button at the top of the page.

**ShowingAssist**

The changes made on this screen will drive how ShowingAssist works by default for your listings. To make special changes to the settings for a specific listing, see page 6. Click the Show Advanced Setup button below the second gray box to open the advanced setup fields.

**User:** Paul Tozzi  
**Company:** Re/Max Properties, Inc  
**Office:** 7931 ALLEN ROAD, ALLEN PARK, MI, 48101  
(\* denotes required information)

**On / Off Status:** Select default ShowingAssist setting for ALL listings that are listed by this agent. [Help](#)

**ON** for Realcomp

NOTE: To adjust the status of an individual listing, go to "Listing Setup" above. To adjust the status of all the listings in the office, go to "Office Setup" above.

Notify me by email at: paul@paultozzi.com

[Hide Advanced Setup](#)

**Agent Requests:** Notify me by email of agent showing requests from Realcomp\*

Notify me by email at: paul@paultozzi.com

Also notify me by Text Message (SMS) at: [Empty field]

Notifications will also be sent to the office at: No email address on file ([How do I change this?](#))

**Feedback:** Select this box if you wish feedback requests to be sent to showing agents who show your listings\*

Enable the sending of Feedback Requests to Showing Agents

[Exit and Close](#)

1. **On/Off Status** – Checking the “On” box will turn on ShowingAssist for ALL of your listings. When a new listing is added, the ShowingAssist link will automatically appear.
2. **“Notify me by email at:”** - Enter your email address if you want to be copied on appointment emails. Changing the email address in one of these fields will change it in the other when saved.
3. **“Also notify me by Text Message (SMS) at:”** – Enter your phone’s text message email address if you want to be notified of an appointment via text message. If you do not want this type of notification, then leave the field blank.

4. **“Notifications will also be sent to the office at:”** – This email address prefills from the Office Setup screen which pulls the email address from the Office Information page on Realcomp *Online*<sup>®</sup>. This field cannot be changed on this screen.
  
5. **Feedback** - If this option is enabled, then a feedback request email is sent out to the showing agent of the property on the evening of the day that they requested to see the property. When they click on the email they get a box to enter feedback in and then the listing agent/broker is notified of the new feedback waiting for them. The feedback can be viewed from the listing activity report and agent activity report on the "Reports" tab. The system won't send these feedback requests if the office is a ShowingDesk user (even if the checkbox is on), as ShowingDesk sends its own feedback requests and this would cause the showing agent to receive duplicate requests.

Click **Exit and Close** when finished to return to Realcomp *Online*<sup>®</sup>.

## Set up for Specific Listings

Listing Setup allows the agent, broker or office assistant to set rules that apply to only one listing. Agents can access Listing Setup through the My Preferences page (as shown on page 4 or through Listing Manager. To access via Listing Manager, select **Listing Manager** from the menu bar at the top of any Realcomp *Online*<sup>®</sup> page. On the Listing Manager summary page, click the desired **MLS number** in the left side column. Scroll down to the section entitled ShowingAssist Listings Options and click the **Configure Showing Assist** link.



This brings up the listing setup page.

#ML: 36164532  
 Address: 417 BALDWIN  
 Price: \$1,850,000  
 ShowingTime preferences for this listing are as follows:

(\*) denotes required information

**Step 1: Set online showing request status for this listing.\*** [Help](#)

**ON** Accept online showing requests for this listing from agents on Realcomp

**NOTE:** To adjust the status for all of the listings that belong to this listing agent, go to the "Agent Setup" tab above. To adjust the status of all of the listings in the office, go to "Office Setup" above.

**Step 2: Select showing type.**

**Appointment Required** [Help](#)

**View Instructions Only** [Help](#)

Type showing instructions here. Required for **View Instructions Only**. Optional for **Appointment Required**.

**Step 3: Edit or create new calendar blocks to block unavailable showing times.\***

**Showing hours. The following times are NOT available for showings:**

Date	Start Time	End Time	Recurrence
12/19/2006 - 1/31/2007	1:00 PM	3:00 PM	Every Monday
12/19/2006 - 1/31/2007	1:00 PM	3:00 PM	Every Tuesday

**Step 4: Select default showing notification preferences for showing requests from agents on Realcomp\***

Send showing notifications to (office):  [\(How do I change this?\)](#)

CC showing notification to (agent):

CC notifications to additional email:  [\(How do I change this?\)](#)

CC to short message requests (SMS) to this wireless email account:

**Step 1** – Select “ON” to activate Showing Assist for this listing. “ON” will be selected by default if you have already chosen for all listings to be turned on automatically. To adjust the status for all of the listings that belong to this listing agent, go to the "Agent Setup" tab above.

**Step 2** – Select showing type. If the property is occupied, then you’ll probably need to select “Appointment Required” so the buyer’s agent will have to wait for a response to the appointment request. If the property is vacant or can otherwise be shown without a response to the appointment request, then select “View Instructions Only” and the instructions can be immediately displayed so that the potential buyers can view the property without waiting for a call back. Type any instructions into the given space and click **Update** when finished.

**Step 3** – To block out times that the property is not available to show, click **Edit Showing Hours**. For example, Mrs Homeowner has a book club meeting at the home every Monday from 1:00 pm to 3:00 pm. You can block out this time using this feature so buyer’s agents are immediately aware that this time will not work. See page 8 Making an Appointment for more details. Clicking **Edit Showing Hours** will bring up the showing hours edit screen. To block out some time, click **Add New Time Block**.

**Edit or create new calendar blocks to block unavailable showing times.**  
Currently saved time blocks: [\(How does this work?\)](#)


**Showing hours. The following times are NOT available for showings:**

<input type="checkbox"/>	Date	Start Time	End Time	Recurrence
<input type="checkbox"/>	6/12/2007 - 12/31/2007	9:00 AM	10:00 AM	Every Monday

Select the desired days and times and click Update Calendar when finished. If you have a recurring block of time to enter, be sure to change the date ranges (below the days of the week checkboxes) or it will only block out the time period for that one day.

**Add New Time Block:**

Select Start and End Times


  Block Entire Day (9.00 AM to 9.00 PM)

Or

Start Time:

End Time:

Choose Frequency of Time Block

  Specify Date:

Or

Select Recurring Days:

<input type="checkbox"/> All	<input type="checkbox"/> Sun	<input type="checkbox"/> Mon	<input type="checkbox"/> Tue
<input type="checkbox"/> Wed	<input type="checkbox"/> Thu	<input type="checkbox"/> Fri	<input type="checkbox"/> Sat


Start  End

To delete previously added time blocks, select the desired block and click the **Delete** button. See image on page 7.

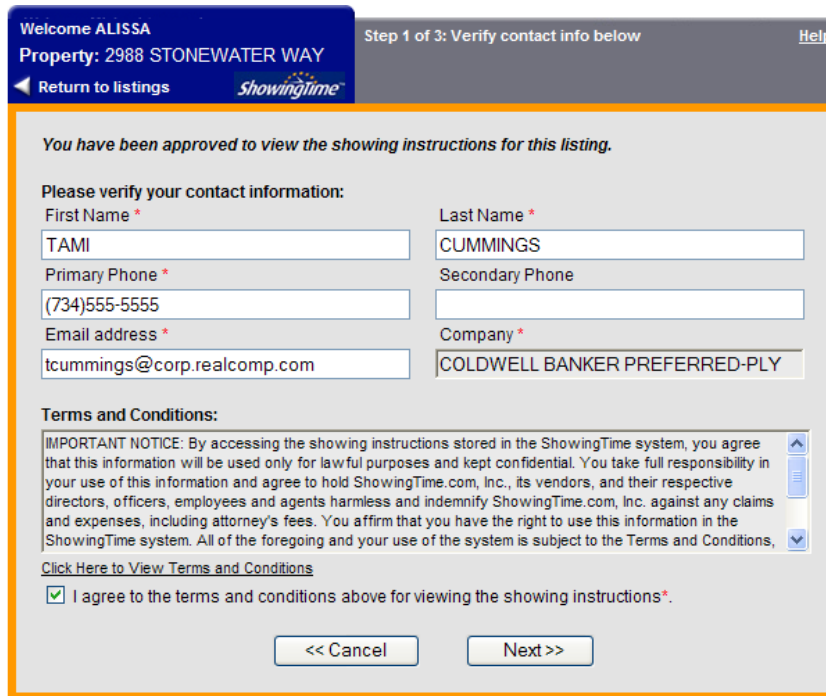
**Step 4** – Edit email and text message notification options if desired. See page 4 and 5 for details about these fields.

Click **Exit and Close** when finished setting up this listing.

## Making and Confirming an Appointment

To schedule a showing from any flyer that has a place for a photo (Full Listing with Photo, Buyer, Two Page Listing Report, etc), click the Schedule a Showing link below the photo.  [Schedule a Showing](#)

A new window will open that will allow you to verify your contact information. Please be sure that it is all correct, check the box at the bottom agreeing to the terms and conditions of ShowingAssist and click **Next**.



The screenshot shows a web browser window titled "ShowingTime" with a dark blue header. The header contains "Welcome ALISSA", "Property: 2988 STONEWATER WAY", "Return to listings" (with a left arrow), and "Step 1 of 3: Verify contact info below" (with a "Help" link). The main content area is light gray and contains a message: "You have been approved to view the showing instructions for this listing." Below this is a section titled "Please verify your contact information:" with several input fields: "First Name \*" (TAMI), "Last Name \*" (CUMMINGS), "Primary Phone \*" ((734)555-5555), "Secondary Phone", "Email address \*" (tcummings@corp.realcomp.com), and "Company \*" (COLDWELL BANKER PREFERRED-PLY). Below the fields is a "Terms and Conditions:" section with a scrollable text area containing an "IMPORTANT NOTICE" and a link "Click Here to View Terms and Conditions". At the bottom of the form is a checked checkbox "I agree to the terms and conditions above for viewing the showing instructions\*" and two buttons: "<< Cancel" and "Next >>".

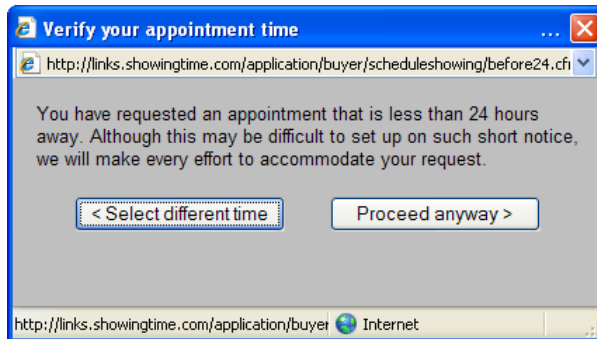
After clicking Next, you will be taken to a calendar from which you can select your desired time to show the property. See the key below for information regarding the various colors of time blocks on the calendar.

### Calendar color key:

**Black** - The time blocks that are unavailable will appear to the showing agent as black cells on the interactive calendar. Showing appointments will not be accepted for any blocked time.

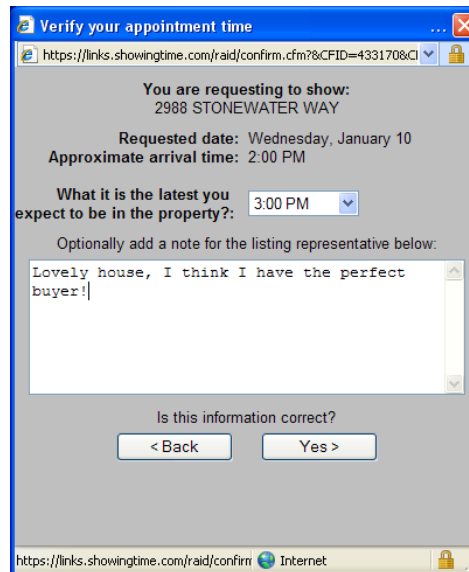
**Blue** - For time slots that are not blocked, but have been reserved by another agent, the cell will appear as blue to indicate that another agent has requested showing at the same time. The calendar will accept a showing request for the same time slot, but only after the showing agent is presented with an explanation.

**Gray** – Time blocks within the next 24 hours within which time it may be difficult to get confirmation of an appointment. You then have the option to proceed or select a different time period.

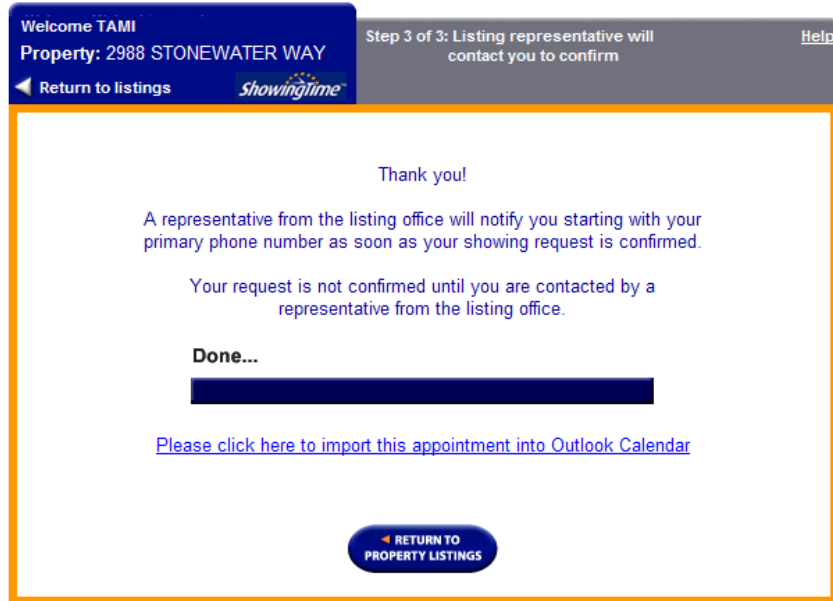


**White** - White cells indicate that the time slot is available for a showing request. When an agent requests a showing during an open (or white) time, then the showing request will automatically be sent to the listing office email address. The representative for the listing will need to follow up with the showing agent to confirm the request as they ordinarily would.

Select the time that you should be finished viewing the property, add any desired notes to the listing agent and click **Yes**.



Clicking Yes will submit the appointment to the listing office/agent and the following message will appear.



The listing office and agent, if specified, will receive the following message.

Hello,

An agent is requesting to show 2988 Stonewater Way on Wednesday, 01/10/2007 at 2:00 PM. To retrieve the requesting agent's information and acknowledge the request, please click on the link below.

<http://assist.showingtime.com/App/Ack.aspx?guid=13571768,11052831,5704,11052831>

The agent is expecting a confirmation call as soon as possible to confirm the showing.

When they click on the link, they will be taken to the Acknowledgement where the listing agent can write any comments back and Confirm the appointment.

AGENT NAME:	Tami Cummings	REQUESTED LISTING:	
COMPANY NAME:	COLDWELL BANKER PREFERRED-PLY	Address:	2988 STONEWATER WAY, LIMA TWP
COMPANY PHONE:	(734) 459-6000	MLS Number:	26089500
AGENT MLSID:	235874	REQUESTED SHOWING DATE:	Wednesday, January 10, 2007 2:00 PM
AGENT CONTACT INFORMATION:		APPOINTMENT HISTORY:	
Primary Phone:	(734) 555-5555	Acknowledged:	Tuesday, January 09, 2007 2:02 PM
Secondary Phone:		Assigned:	Tuesday, January 09, 2007 1:57 PM
Email:	<a href="mailto:tcummings@corp.realcomp.com">tcummings@corp.realcomp.com</a>	Requested:	Tuesday, January 09, 2007 1:57 PM
ADDITIONAL COMMENTS:			
<div style="border: 1px solid gray; padding: 5px;">Lovely house, I think I have the perfect buyer! I expect to be at the property no later than 3:00 PM.</div>			
Add Comments for the Showing Agent:			
<div style="border: 1px solid gray; padding: 5px;">Directions to property: Off of Main Street just before Second Ave.</div>			
<input type="button" value="Confirm"/> Send an email to the Showing Agent confirming this appointment			
<input type="button" value="Close"/> Close this window without sending a confirming email to the Showing Agent			

Once confirmed, the agent that has requested the showing will receive an email indicating this.

To: Tami Cummings COLDWELL BANKER PREFERRED-PLY <a href="mailto:tcummings@corp.realcomp.com">tcummings@corp.realcomp.com</a>
This confirms your scheduled Showing of the property located at: 2988 STONEWATER WAY #26089500 Price: \$999,000
Scheduled for: Wednesday, January 10, 2007 2:00 PM
Listing Agent: Tami Cummings, COLDWELL BANKER PREFERRED-PLY, (734) 555-5555
Additional Comments: Directions to property: Off of Main Street just before Second Ave.

## Viewing ShowingAssist Reports

Both brokers and agents have reports available in their setup screens. To access reports, click on the Reports tab at the top of the ShowingAssist page.

Agents can view reports on the properties that they have scheduled or have shown (My Showings), showings on properties that they have listed (Showings on My Listings) and listing activity.

### My Showings

Date/Time	MLS #	Address	City	Price	Status	Directions	Showing Instructions	Feedback
01/10/2007 02:00 PM	26089500	2988 STONEWATER WAY	LIMA TWP	\$999,000	Confirmed			

### Showings on My Listings

Listing ID	Listing Address	Showing Agent	Showing Agent Office	Showing Date/Time	Showing Requested	Showing Status
<a href="#">26089500</a>	<a href="#">2988 STONEWATER WAY, LIMA TWP</a>	ALISSA NEAD	COLDWELL BANKER PREFERRED-PLY - 44644 Ann Arbor Ste A	<a href="#">Showing @ Wed 1/10/07 2:00 PM</a>	<a href="#">Tue 1/09/07 1:57 PM</a>	<a href="#">Confirmed</a>

### Listing Activity (including feedback from showing agents)

Listing Activity Report - 1543 W ROLSTON RD, LINDEN, MI, 48451-9769						
Showing Agent	Showing Agent Office	Showing Date/Time	Showing Requested	Showing Status	Showing Agent Feedback	
AMBER CHAMBERS	THE MICHIGAN GROUP-LIVINGSTON - 6870 Grand River Ave	<a href="#">Showing @ Fri 1/12/07 4:00 PM</a>	<a href="#">Tue 1/09/07 10:43 AM</a>	<a href="#">Acknowledged</a>		

Brokers can get the same information as the agent but can get it for any of the agents and/or listings in their office. They have the additional option of Office Activity that displays all showings for the office in one report.

Office Activity Report for COLDWELL BANKER PREFERRED-PLY						
Listing ID	Listing Address	Showing Agent	Showing Agent Office	Showing Date/Time	Showing Requested	Showing Status
<a href="#">26089500</a>	<a href="#">2988 STONEWATER WAY, LIMA TWP</a>	ALISSA NEAD	COLDWELL BANKER PREFERRED-PLY - 44644 Ann Arbor Ste A	<a href="#">Showing @ Wed 1/10/07 2:00 PM</a>	<a href="#">Tue 1/09/07 1:57 PM</a>	<a href="#">Confirmed</a>