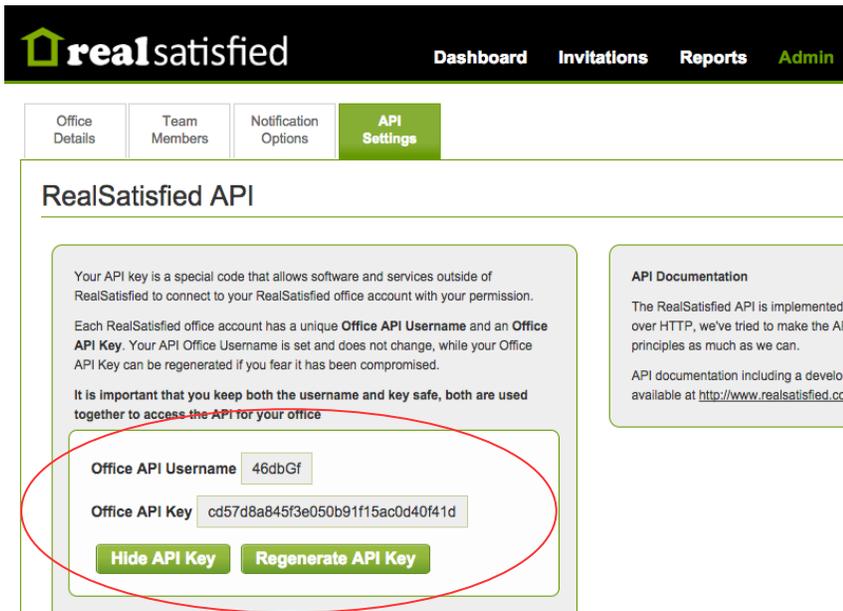


RealSatisfied Integration

RealSatisfied - Initial Setup

In order to participate with RealSatisfied the broker must already have a RealSatisfied Broker PRO account. This will be configured in brokerWOLF. For multi-office brokers a separate set of API Credentials are required for each office.

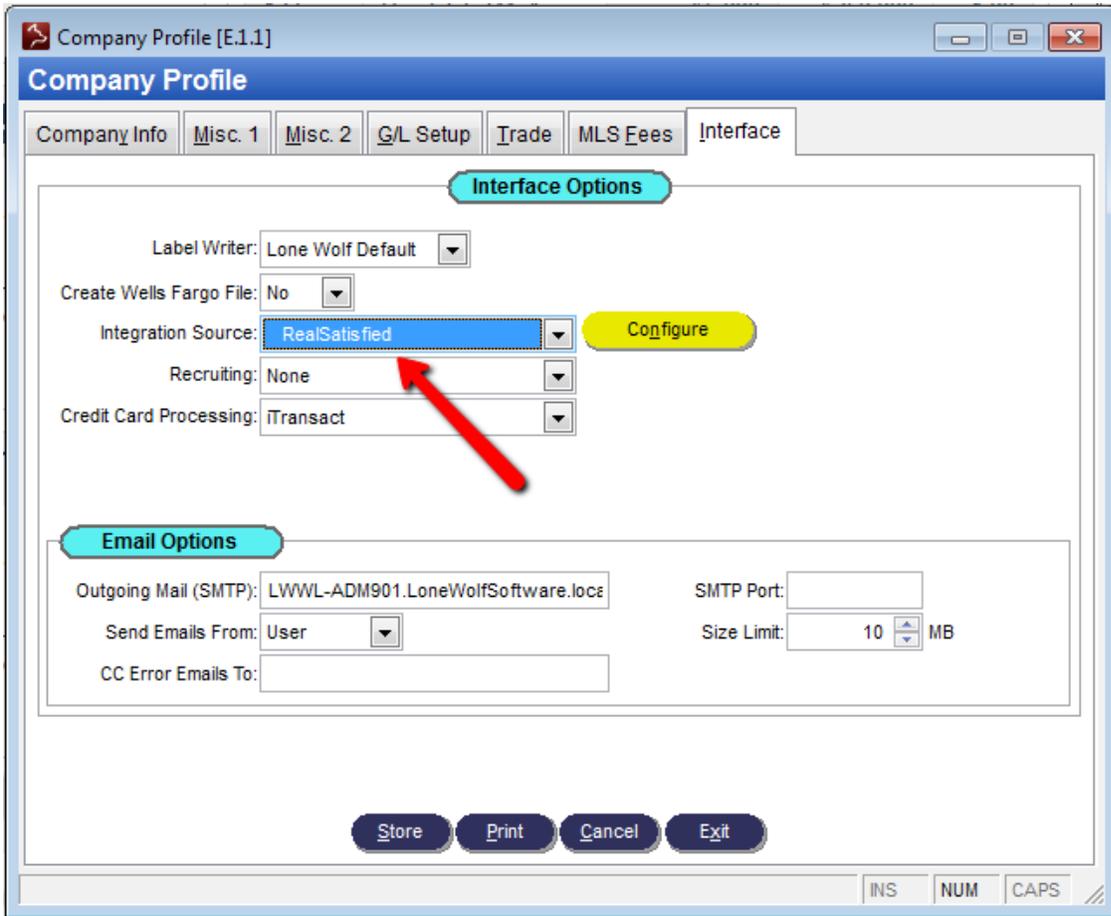
API Credentials are found under Admin > API Settings in RealSatisfied (the API must first be enabled under Owner Settings).



Using the RealSatisfied API Credentials for your office,

1. Log into brokerWOLF.
2. In the menu click on E.1.1 (Edit Company Profile).
3. Click on the Interface tab.
4. In the "Integration Source" dropdown select "RealSatisfied" and click on the "Configure" button.

RealSatisfied Integration



The screenshot shows a software window titled "Company Profile [E.1.1]" with a "Company Profile" header. The "Interface" tab is selected, showing "Interface Options".

Interface Options

- Label Writer: Lone Wolf Default
- Create Wells Fargo File: No
- Integration Source: RealSatisfied (highlighted with a red arrow)
- Recruiting: None
- Credit Card Processing: iTransact

A yellow "Configure" button is next to the Integration Source dropdown.

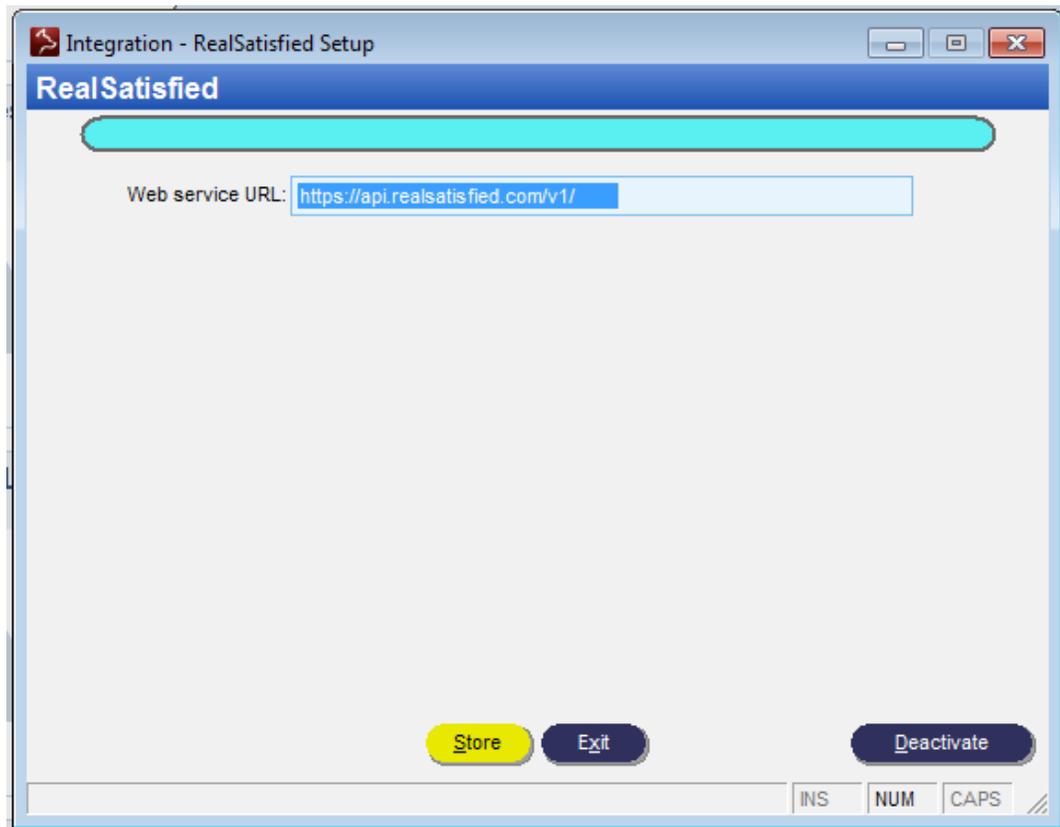
Email Options

- Outgoing Mail (SMTP): LWWL-ADM901.LoneWolfSoftware.local
- SMTP Port: []
- Send Emails From: User
- Size Limit: 10 MB
- CC Error Emails To: []

Buttons at the bottom: Store, Print, Cancel, Exit.

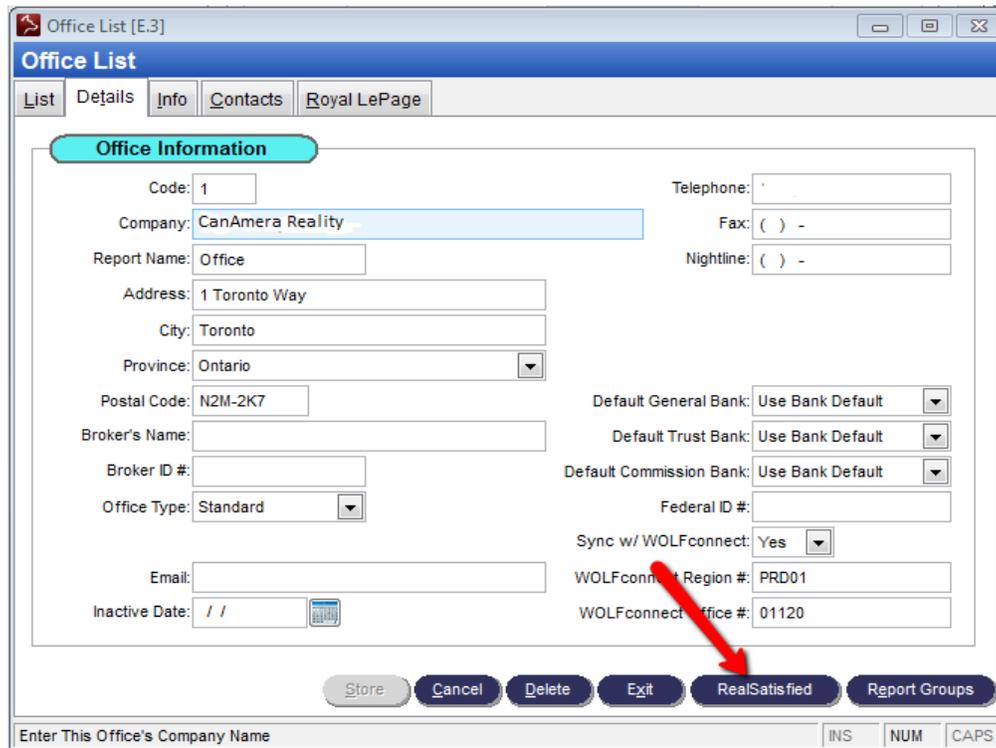
5. In the "Web service URL" it will display the URL that is used to communicate with RealSatisfied (<https://api.realsatisfied.com/v1/>). Click on "Store," then on the Company Profile page click on "Store" again. This will return you to the dashboard.

RealSatisfied Integration



6. In the menu click on E.3 (Edit Office List). Select the office and click on Edit. In the lower right corner click on the “RealSatisfied” button.

RealSatisfied Integration



The screenshot shows the 'Office List [E.3]' application window with the 'Office Information' tab selected. The form contains the following fields and controls:

- Code: 1
- Company: CanAmerica Reality
- Report Name: Office
- Address: 1 Toronto Way
- City: Toronto
- Province: Ontario
- Postal Code: N2M-2K7
- Broker's Name: (empty)
- Broker ID #: (empty)
- Office Type: Standard
- Email: (empty)
- Inactive Date: //
- Telephone: (empty)
- Fax: () - (empty)
- Nightline: () - (empty)
- Default General Bank: Use Bank Default
- Default Trust Bank: Use Bank Default
- Default Commission Bank: Use Bank Default
- Federal ID #: (empty)
- Sync w/ WOLFconnect: Yes
- WOLFconnect Region #: PRD01
- WOLFconnect Office #: 01120

At the bottom of the form, there are buttons for Store, Cancel, Delete, Exit, RealSatisfied, and Report Groups. A red arrow points to the RealSatisfied button. Below the form is a status bar with the text 'Enter This Office's Company Name' and keyboard shortcuts INS, NUM, and CAPS.

7. The RealSatisfied configuration will display with the following options.
 - a. Web service URL – this should always be “https://api.realsatisfied.com/v1/”
 - b. Office API Username – the *Office API Username* provided by RealSatisfied (e.g. abc123).
 - c. Office API Key – the *Office API Key* provided by RealSatisfied.

NOTE : If you believe that your *Office API Key* has been compromised, you can regenerate it in RealSatisfied. Once regenerated, any applications using the existing *Office API Key* will no longer function until the new key is added.



The screenshot shows the 'Office Integration - RealSatisfied Credentials' window. It contains the following fields and controls:

- Office API Username: abc123
- Office API Key: (masked with asterisks)
- Test button
- Store button
- Exit button

At the bottom of the window is a status bar with keyboard shortcuts INS, NUM, and CAPS.

8. Click on “Store” to save the settings and return you to the Office Information.

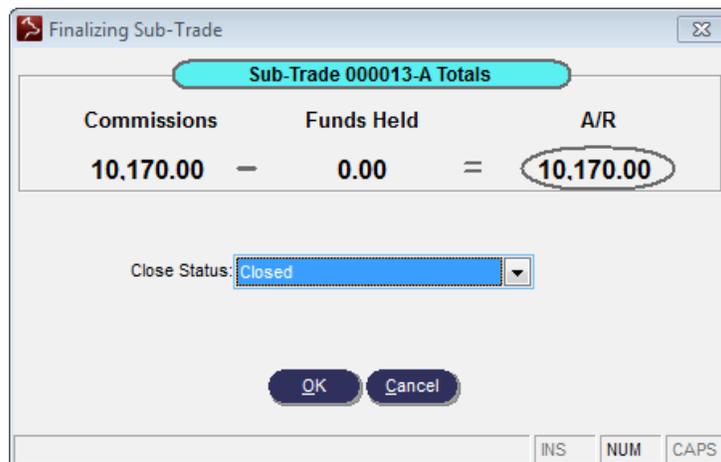
RealSatisfied Integration

9. Click on Exit to return you to the brokerWOLF dashboard.

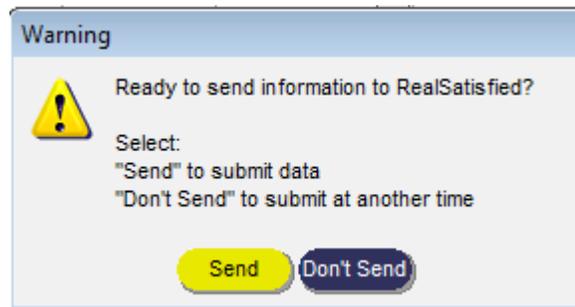
RealSatisfied - Sending Surveys

The RealSatisfied survey will be triggered when the User “finalizes” a transaction in brokerWOLF. The survey will only be sent to the side the agent represents (e.g. Listing Side will send the email to the Seller, Selling Side will send it to the Buyer, and Agent Double Ender will send it to both).

1. In brokerWOLF find the transaction in Trade Records (2.1). Click on the “Commission” or “Agents” tab, and then click on the “Finalize” button.
2. The Finalizing Sub-Trade popup will display. Select “Closed” in the drop down and click on “OK.”

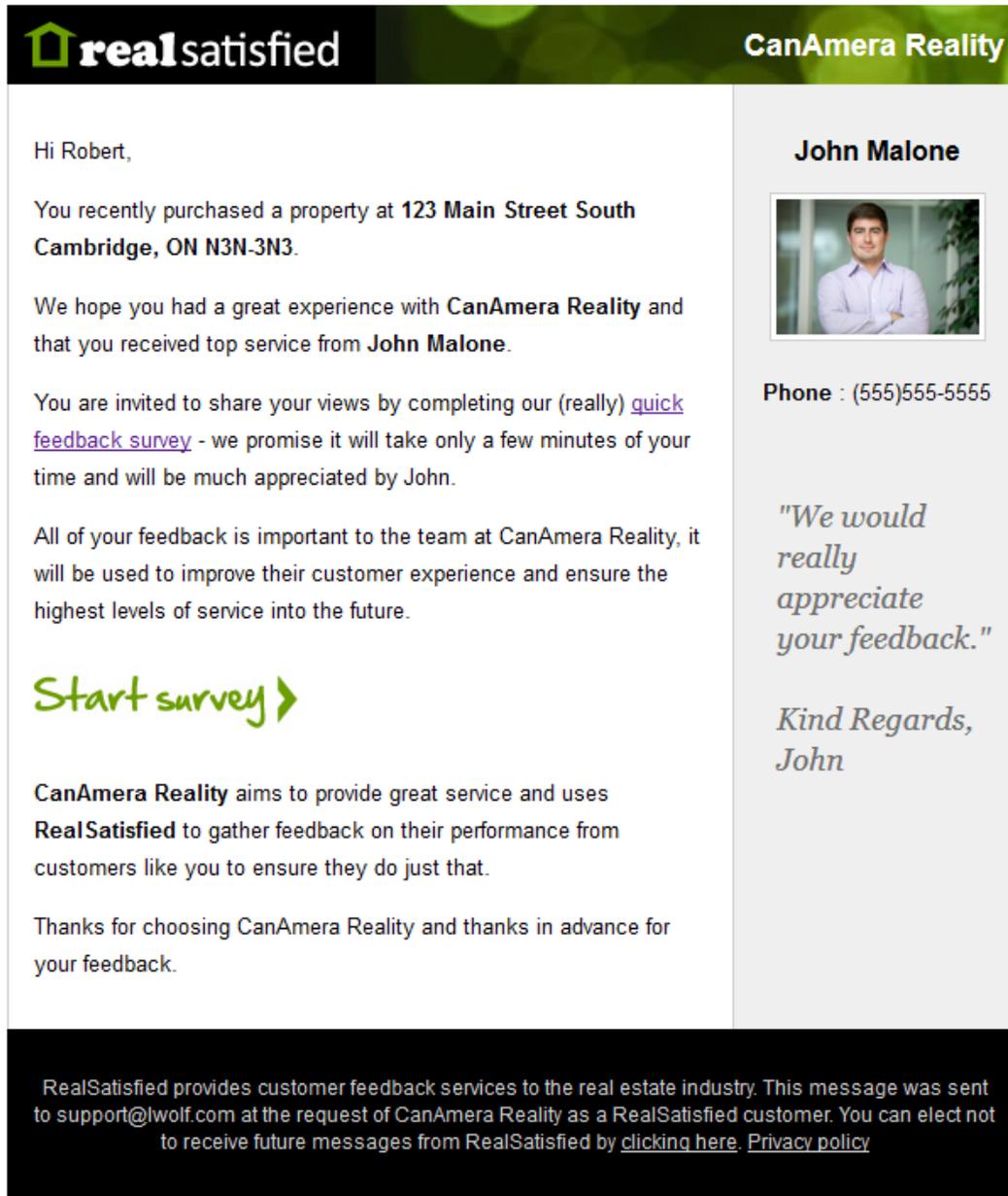


3. The RealSatisfied popup will display prompting to send a survey.
 - a. Clicking on “Send” will send the survey to your client.
 - b. Clicking on “Don’t Send” will not send a survey.



RealSatisfied Integration

4. If the User selects “Send” then RealSatisfied system will send the Buyer / Seller an email sent from survey@realsatisfied.com.



The screenshot shows an email interface with a dark green header. On the left, the RealSatisfied logo is displayed. On the right, the CanAmera Reality logo is shown. The main content area is split into two columns. The left column contains the body of the email, which includes a greeting, a reference to a recent property purchase, an invitation to complete a survey, and a 'Start survey' button. The right column features a profile for John Malone, including a photo, his name, phone number, a testimonial quote, and a sign-off. A footer at the bottom provides contact information and a privacy policy link.

realsatisfied **CanAmera Reality**

Hi Robert,

You recently purchased a property at **123 Main Street South Cambridge, ON N3N-3N3**.

We hope you had a great experience with **CanAmera Reality** and that you received top service from **John Malone**.

You are invited to share your views by completing our (really) [quick feedback survey](#) - we promise it will take only a few minutes of your time and will be much appreciated by John.

All of your feedback is important to the team at CanAmera Reality, it will be used to improve their customer experience and ensure the highest levels of service into the future.

Start survey >

CanAmera Reality aims to provide great service and uses **RealSatisfied** to gather feedback on their performance from customers like you to ensure they do just that.

Thanks for choosing CanAmera Reality and thanks in advance for your feedback.

John Malone



Phone : (555)555-5555

"We would really appreciate your feedback."

*Kind Regards,
John*

RealSatisfied provides customer feedback services to the real estate industry. This message was sent to support@lwolf.com at the request of CanAmera Reality as a RealSatisfied customer. You can elect not to receive future messages from RealSatisfied by [clicking here](#). [Privacy policy](#)

5. When the client receives the email they click on “Start Survey” and they will be redirected to the RealSatisfied website to complete the survey.

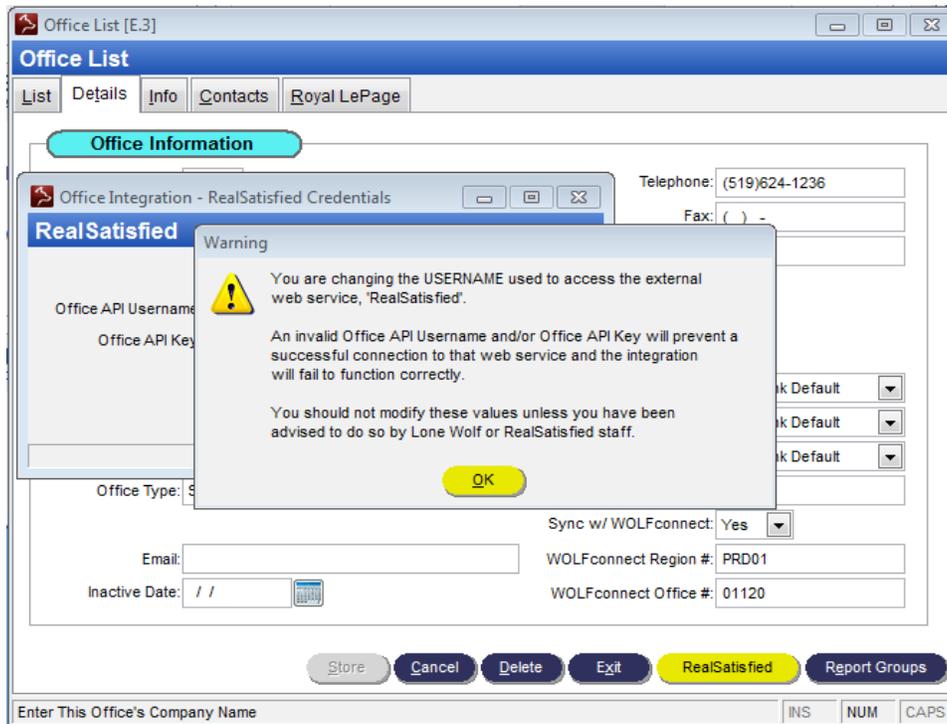
RealSatisfied Integration

Other Notes:

- In brokerWOLF, when finalizing a transaction, if the User receives the popup message: “{“ErrorCode”:401, “ErrorMessage”:“Unauthorized”}”, verify that the RealSatisfied configuration (username and password) is correct.



- When you change one character of the Username or Password a popup will display informing you that incorrect changes will break the connection to RealSatisfied. On the popup, just click on “OK” to continue.



RealSatisfied Integration

- [To view the results of the survey the Broker must log into the RealSatisfied back-office at <https://secure.realsatisfied.com>. A login will be provided by RealSatisfied. The Broker also has access to view reports and resend surveys to a client.

Administering RealSatisfied

Account Creation

When a transaction is sent to RealSatisfied to create an invitation & survey, the RealSatisfied system makes a check to see if an agent account already exists within RealSatisfied for that office.

Where no account is found RealSatisfied attempts to create an account using the Agent profile information in brokerWOLF. Where successful an account is created, a welcome email is sent to the Agent and the survey invitation is created.

You may also manually add Team Member (Agent) accounts to RealSatisfied at any time, however it is critical that the same email address used for the agent is used in brokerWOLF. Every agent must have a unique email address to use RealSatisfied.

RealSatisfied Integration

Customer Escalations

When customers respond to a survey, and are less than satisfied with the service they received, they are provided with an option to be contacted by office management.

We call these escalations. Escalations are sent directly to the *Escalation Contacts* for the office. We recommend that the Broker be added as an escalation contact for your office, in addition to the RealSatisfied Office Admin.

You may make any Team Member an Escalation Contact by checking this box within the Team Member profile under **Admin > Team Members > Edit Team Member**.

When an escalation is received each Escalation Contact is emailed with the details as provided by the customer, their contact number that they have provided and the entire survey response.

Also included within the message is an acknowledgement link. This link should only be clicked by the person that has taken responsibility for contacting the customer and has actioned the request.

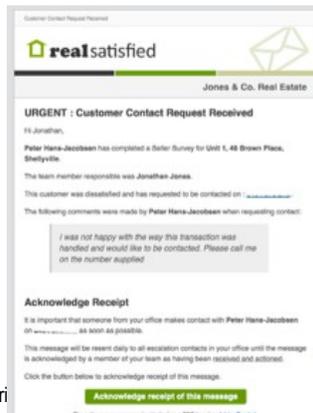
We will send the message to the escalation contacts every day until it has been acknowledged as having been actioned.

Team Member Access Privileges

| Access | Data Access | Administration Only | Customer Escalation |
|---|--|--|--|
| This Team Member can... select all <input checked="" type="checkbox"/> Administer Account <input checked="" type="checkbox"/> Create Invitations <input checked="" type="checkbox"/> View Invitation Status <input checked="" type="checkbox"/> View Reports | This Team Member can see... <input type="radio"/> Their own responses only <input checked="" type="radio"/> All people in this Company | Does this Team Member only need Administration access? <input type="checkbox"/> Administration access only More about Administration Only... | Does this Team Member need to receive Customer Escalations? <input checked="" type="checkbox"/> Customer Escalation Contact More about Customer Escalations... |

When a customer makes Customer Callback request via one of our survey's each *Escalation Contact* in the office is notified via email (similar to that shown below)

Note the 'Acknowledge Receipt' button in the message. This should only be clicked by the person that is actioning the contact with the customer. RealSatisfied will send this message daily until it is acknowledged as being actioned by an *Escalation Contact*.





RealSatisfied Integration

Once acknowledged, all other *Escalation Contacts* will be advised via email who has taken responsibility to action the customer contact.

Invitation Creation

Survey's are sent by RealSatisfied once they are marked as closed in brokerWOLF based on the data recorded in brokerWOLF at that time.

If that data is incorrect when the survey invitation is created, updating it in brokerWOLF will not correct or generate a new invitation. Should this occur, a new invitation will need to be created with the correct data, and the original invitation deleted (provided it has not been responded to).

As the RealSatisfied Office Admin, you are able to create invitations on behalf of Team Members.

You may also choose to provide agents with an ability to do this themselves by providing them with *Create Invitation* privileges under their Team Member profile. The decision to provide this access is up to your brokerage.

Please note it is **important** that invitations are not created manually prior to them being closed in brokerWOLF to avoid duplicate invitations being created when the transaction is closed in brokerWOLF.

RealSatisfied Integration

Agent Permissions

There are 5 permissions or privileges available to Team Members, View Reports, View Invitations Status, Create Invitations (Limited), Create Invitations and Administer Account

By default Team Members are created with access to *View Reports*, *View Invitations* and *Create Invitations (Limited)* for their *Own Data Only*. This also means that they are only able to access their own *Agent Dashboard* via their *Agent Profile Page*.

You may provide Team Members with additional privileges as is required.

Team Member Access Privileges

| Access | Data Access | Administration Only | Customer Escalation |
|---|--|--|---|
| This Team Member can... select all <input type="checkbox"/> Administer Account <input type="checkbox"/> Create Invitations <input checked="" type="checkbox"/> View Invitation Status <input checked="" type="checkbox"/> View Reports | This Team Member can see... <input checked="" type="radio"/> Their own responses only <input type="radio"/> All people in this Company | Does this Team Member only need Administration access? <input type="checkbox"/> Administration access only More about Administration Only... | Does this Team Member need to receive Customer Escalations? <input type="checkbox"/> Customer Escalation Contact More about Customer Escalations... |

Create Invitations (Limited) provides access to create invitations for limited survey types. This includes survey types that are typically not automated or triggered such as *Lost Listing Presentation* and specifically excludes *Seller* and *Buyer* surveys

By providing a Team Member with access to *Create Invitations* they will be able to create invitations for any survey. This may lead to an increased risk of duplication for surveys that are automated by brokerWOLF.

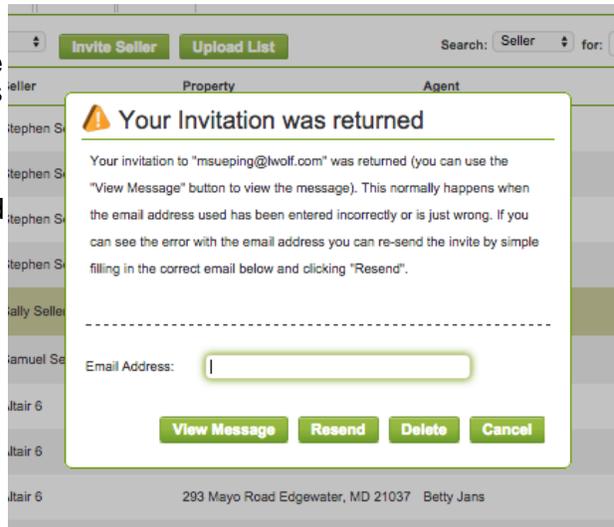
By providing a Team Member with *Administer Account* access they will be able to administer the account just as the RealSatisfied Office Admin does.

Finally, by providing a Team Member with access to *All Data in the Office*, they will be able to see reports via the Broker Dashboard for all Team Members in the office. This is usually suitable for Brokers, admins and other office management.

RealSatisfied Integration

Returned Surveys

When an email invitation is not able to be delivered it is returned to RealSatisfied as an Undeliverable/Bounce. When this occurs both the Team Member it relates to and the creator of the invitation are notified. Where the invitation was created via the API then Office API Contact is included as the creator.



Quarantine

The RealSatisfied system contains a number of audit and validation checks to verify the authenticity of responses received for Agents. It's ultimately important to us, our customers and consumers that RealSatisfied Testimonials come from real customers involved in real transactions – verified testimonials and ratings that can be trusted.

When an item is Quarantined both the creator of the invitation and the Team Member will be notified via email. Where the invitation was generated from CREST data the creator is the RealSatisfied Office Admin (Office API Notifications Email).

For Quarantined items you have 3 options.



Request Review - where you believe that the quarantined item is an error, you can request a review. This will automatically open a helpdesk ticket for the review and a member of our team will look at the response. On occasion more information may be requested from you via the helpdesk.

Delete the response - When viewing the options for a Quarantined response, you may elect to delete this response from the system. This deletion is permanent and cannot be reversed.

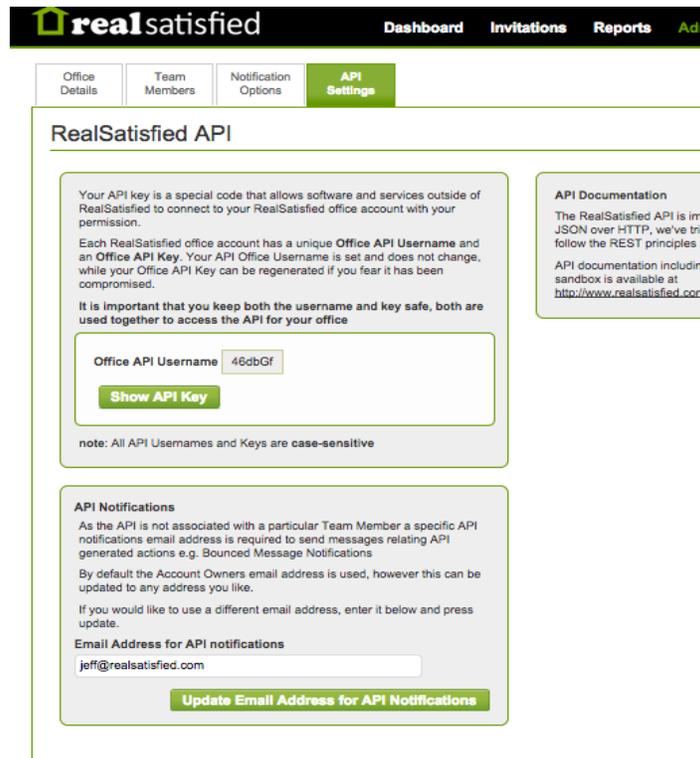
Do Nothing - Items remaining in Quarantine for an extended period of time may be subject to deletion from the system without notice to you.

RealSatisfied Integration

API Notifications Email

The API Notifications Email is set by default to the email address for the RealSatisfied Office Admin when your office is created.

This is an important address as it is used for many notifications in the system as well as a point of contact for administration and support tasks that may arise from time to time based on Team Member questions in the help desk



The screenshot shows the 'RealSatisfied API' settings page. At the top, there is a navigation bar with 'Dashboard', 'Invitations', 'Reports', and 'Admin'. Below this, there are tabs for 'Office Details', 'Team Members', 'Notification Options', and 'API Settings'. The 'API Settings' tab is selected. The main content area is titled 'RealSatisfied API' and contains three sections: 1. 'Your API key is a special code that allows software and services outside of RealSatisfied to connect to your RealSatisfied office account with your permission. Each RealSatisfied office account has a unique Office API Username and an Office API Key. Your API Office Username is set and does not change, while your Office API Key can be regenerated if you fear it has been compromised. It is important that you keep both the username and key safe, both are used together to access the API for your office.' Below this text is a form with 'Office API Username' set to '46dbGf' and a 'Show API Key' button. A note below the form states: 'note: All API Usernames and Keys are case-sensitive'. 2. 'API Documentation' section with text: 'The RealSatisfied API is implemented in JSON over HTTP, we've tried to follow the REST principles as much as possible. API documentation including a sandbox is available at <http://www.realsatisfied.com>'. 3. 'API Notifications' section with text: 'As the API is not associated with a particular Team Member a specific API notifications email address is required to send messages relating to API generated actions e.g. Bounced Message Notifications. By default the Account Owners email address is used, however this can be updated to any address you like. If you would like to use a different email address, enter it below and press update.' Below this text is a form with 'Email Address for API notifications' set to 'jeff@realsatisfied.com' and an 'Update Email Address for API Notifications' button.

The address for API notifications is maintained under **Admin > API Settings > API Notifications** and should be maintained as the address for the RealSatisfied Office Admin.

Agent Assistance

Agents in your office may request assistance from you as the Office API Contact. Should you not be able to assist them, please refer them to the brokerWOLF helpdesk for BrokerWOLF specific issues or to the RealSatisfied Helpdesk. A 'Help' tab is available to Agent from their Agent Dashboard

Many RealSatisfied questions can be resolved via the RealSatisfied Agent Tutorial Guide available here <http://support.realsatisfied.com/index.php?pg=kb.book&id=10>