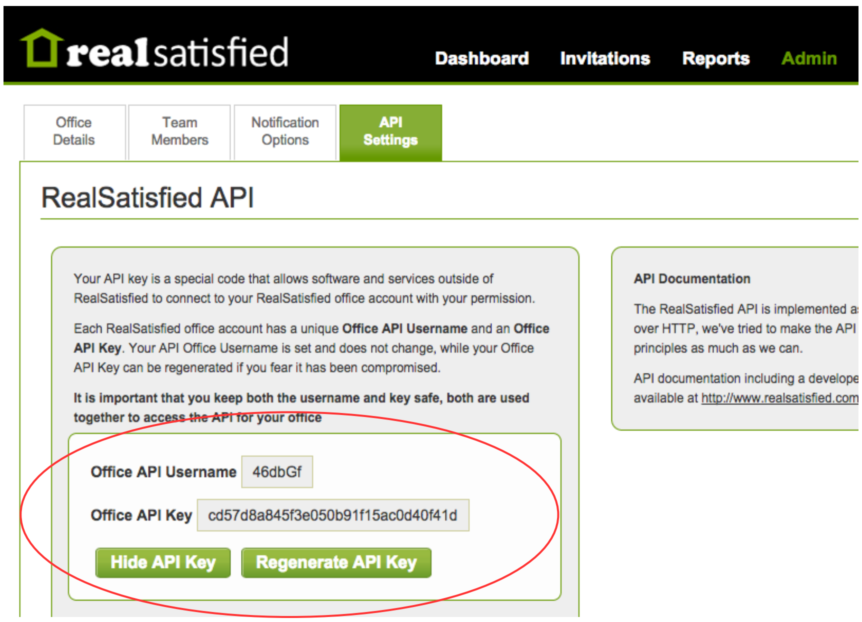
RealSatisfied Integration

RealSatisfied - Initial Setup

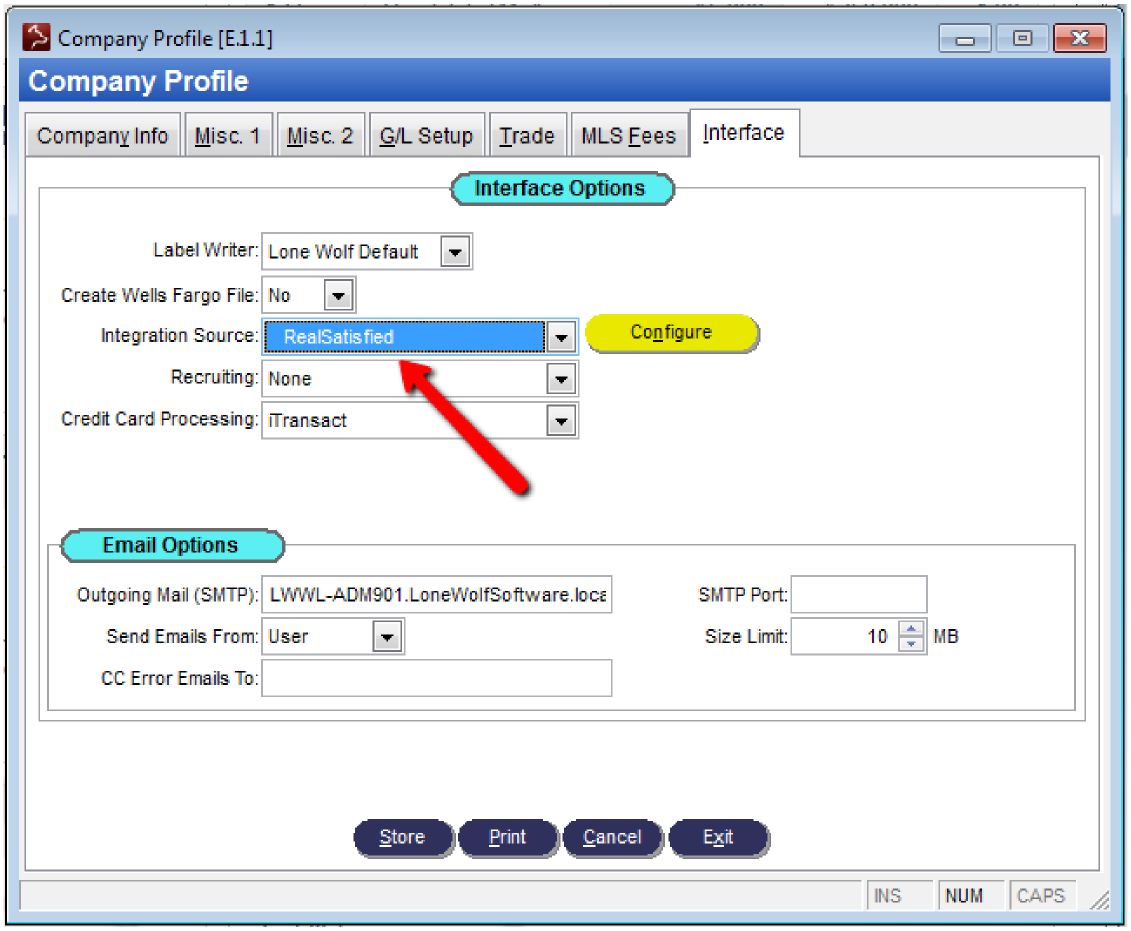
In order to participate with RealSatisfied the broker must already have a RealSatisfied Broker PRO account. This will be configured in brokerWOLF. For multi-office brokers a separate set of API Credentials are required for each office.

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

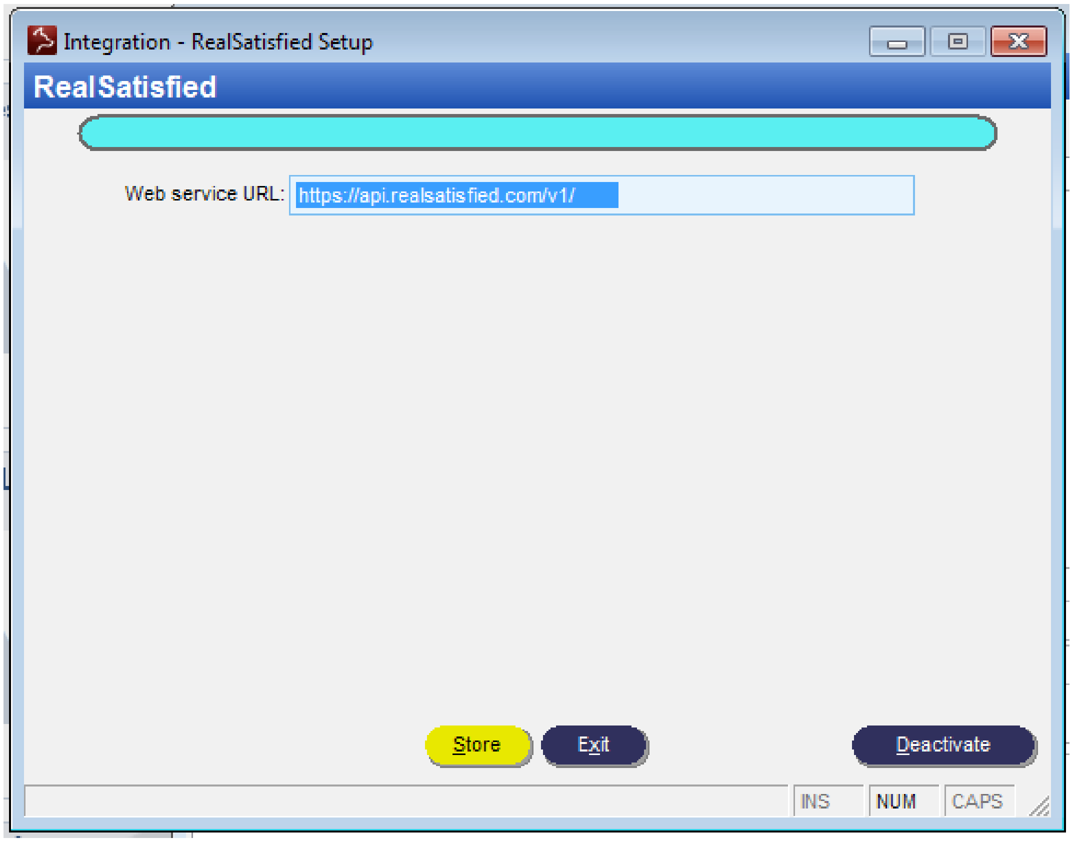


Using the RealSatisfied API Credentials for your office,

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.



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.



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.

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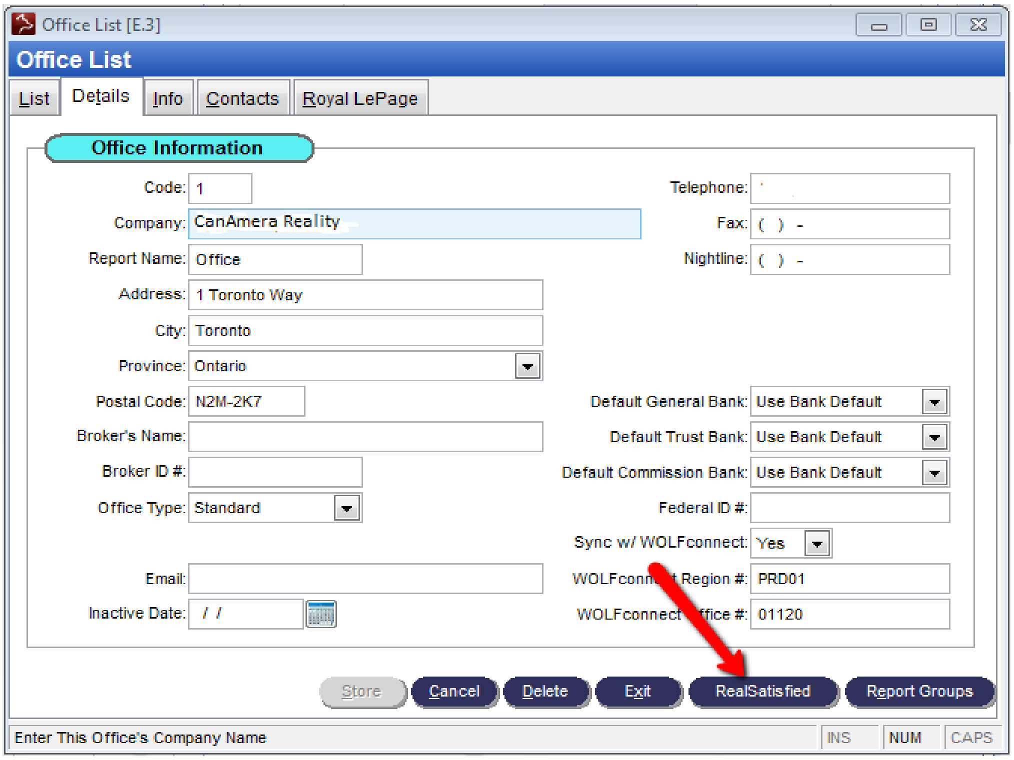
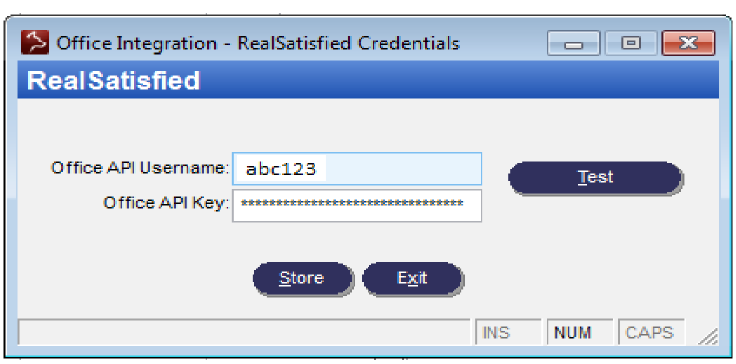


7. The RealSatisfied configuration will display with the following options.
    a. Web service URL – this should always be "https://api.realsatisfied.com/v1/"
    b. Office API Username – the *Office API Username* provided by RealSatisfied (e.g. abc123).
    c. Office API Key – the *Office API Key* provided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



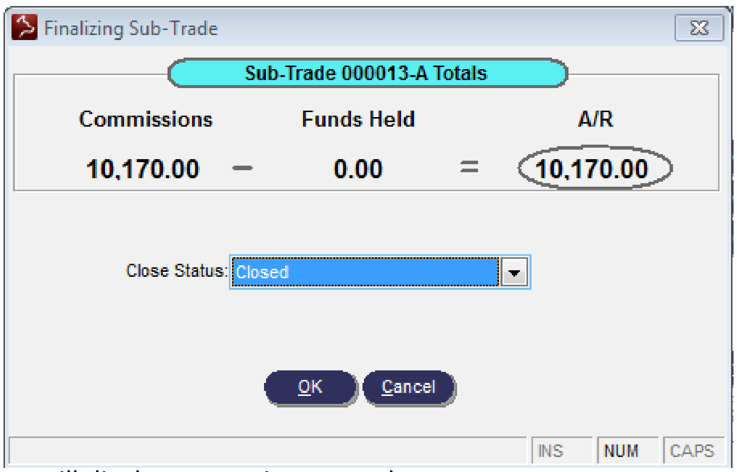
8. Click on "Store" to save the settings and return you to the Office Information.

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

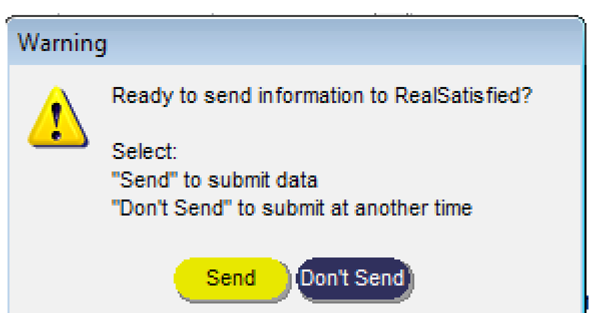
RealSatisfied - Sending Surveys

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.



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

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.

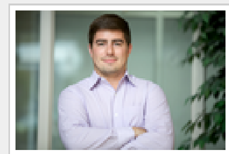
All of your feedback is important to the team at CanAmera Reality, it will be used to improve their customer experience and ensure the highest levels of service into the future.

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

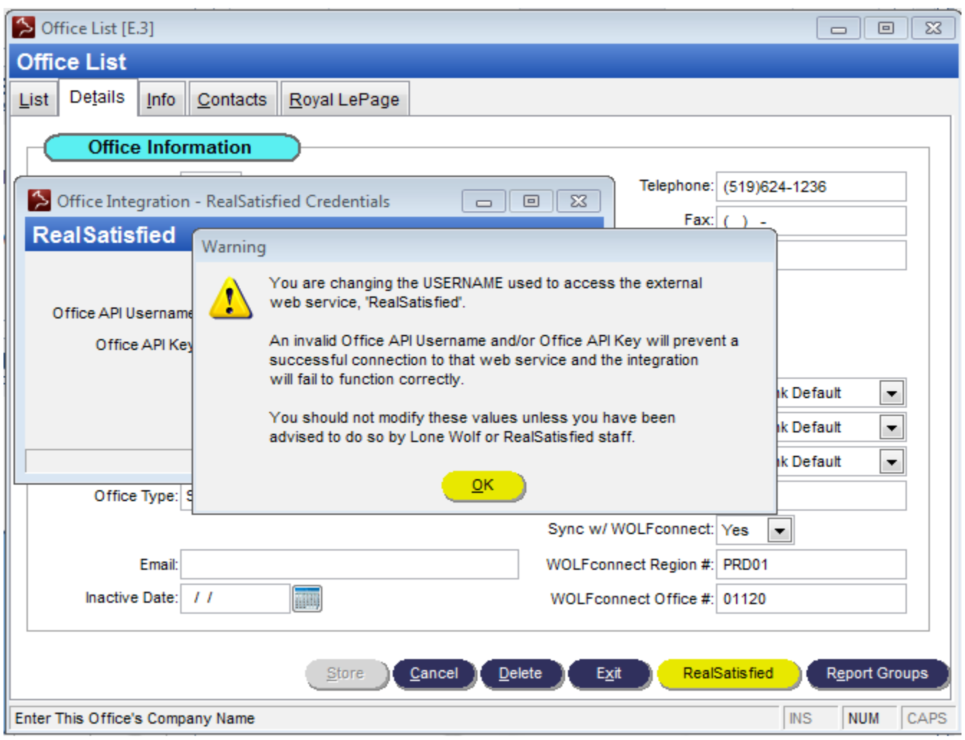
RealSatisfied provides customer feedback services to the real estate industry. This message was sent to support@lwolf.com at the request of CanAmera Reality as a RealSatisfied customer. You can elect not to receive future messages from RealSatisfied by clicking here. Privacy policy

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.

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.



- 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.

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.

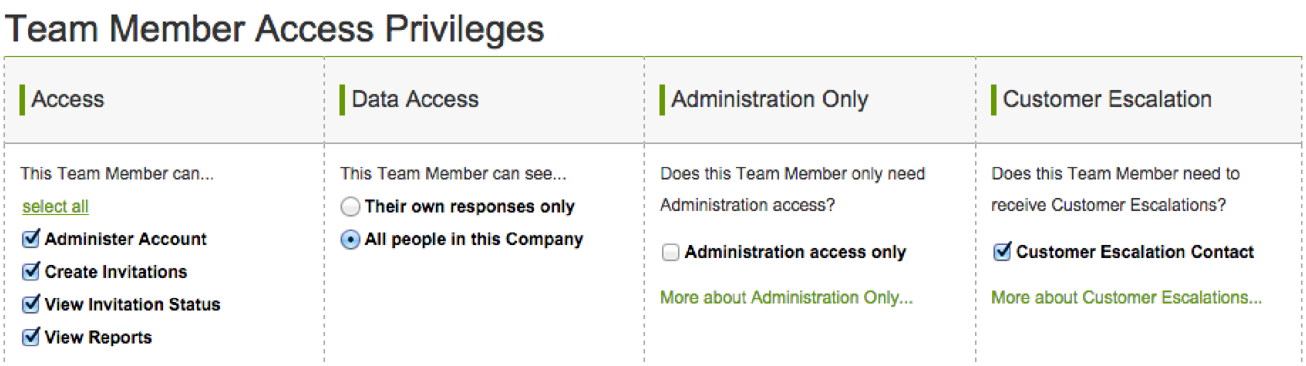
We call these escalations. Escalations are sent directly to the *Escalation Contacts* for the office. We recommend that the Broker be added as an escalation contact for your office, in addition to the RealSatisfied Office Admin.

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 he customer, their contact number that they have provided and the entire survey response.

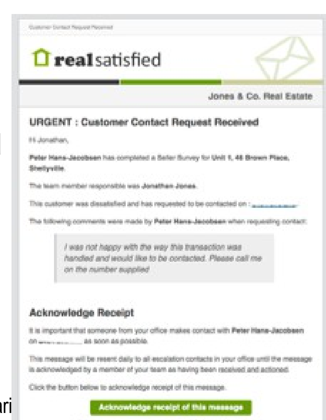
Also included within the message is an acknowledgement link. This link should only be clicked by the person that has taken responsibility for contacting the customer and has actioned the request.

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



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.*



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 a that time.

If that data is incorrect when he 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.

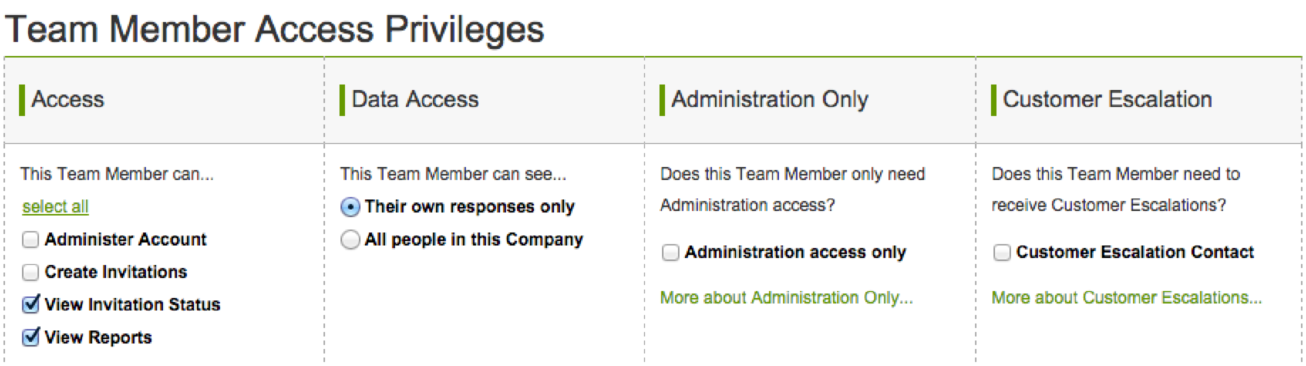
Please note it is **important** that invitations are not created manually prior to them being closed in brokerWOLF to avoid duplicate invitations being created when the transaction is closed in brokerWOLF.

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*, V*iew Invitations* and *Create Invitations (Limted)* 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.



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 a 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.

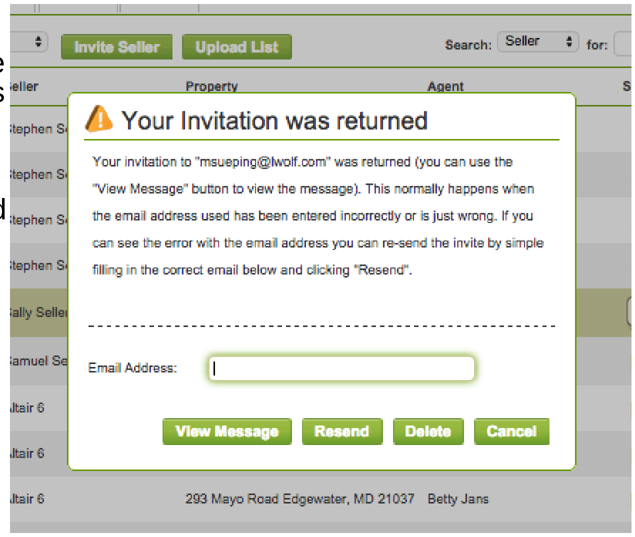
Finally, by providing a Team Member with access to *All Data in the Office*, they will be able to see reports via the Broker Dashboard for all Team Members in the office. This is usually suitable for Brokers, admins and other office management.

LONE WOLF brokerWOLF

RealSatisfied Integration

Returned Surveys

When an email invitation is not able to be delivered it is returned to RealSatsifed 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).

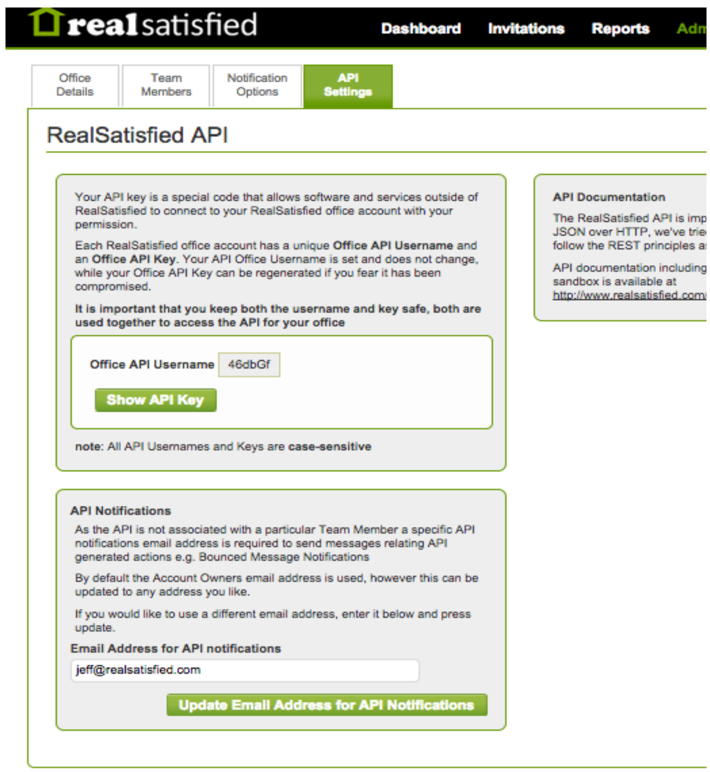
For Quarantined items you have 3 options.

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.

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 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