Realvolve Setup Checklist

Place a check in the each circle as you complete the process. Some processes are only for the account owner or admins and others need to be completed for EACH user. If you add user later, be sure to

◯ Login to your Realvolve account: https://login.realvolve.com

◯ Bookmark the URL: https://login.realvolve.com on your browser's bookmark bar.

◯ SETTINGS > **MY ACCOUNT** for each user

◯ SETTINGS > **EMAILS** for each user

◯ SETTINGS > **AUTOMATION** (only available to account owner/admins)

◯ SETTINGS > **INTEGRATIONS** for each user

◯ SETTINGS > **MY SOCIAL NETWORK** for each user

◯ SETTINGS > **SMS SERVICES** for each user

◯ SETTINGS > **TIME ZONE** for each user

◯ SETTINGS > **CONTACT SOURCE TYPE** (only available to account owner/admins)

◯ SETTINGS > **USERS & PERMISSIONS** (only available to account owner/admins)

◯ SETTINGS > **BOARDS** (only available to account owner/admins)

◯ SETTINGS > **SET DEFAULT FIELDS**

Once you have completed the checklist above, take the following courses from our training site:

https://training.realvolve.com

◯ Key Concepts - 3 Core Databases, Screen Layout, Searching & Filtering, Tagging

◯ Contact Database - How to enter: Clients, Past Clients, Leads, Agents, Vendors

◯ Properties - How to add Properties (Your Personal Listings)

◯ Transactions - How to add Transactions (Your Closings)