

Showing Feedback Getting Started

What is Showing Feedback?

SurveyMagik integration for Showing Feedback allows a Listing Agent to set up custom surveys for their listings. After a new survey has been created, individuals showing a property using their SentriCard®, the RAD, SentriSmart™ or a 1 day code, will receive a Showing Feedback email to take a survey about the listing. This handout will discuss how to manage the Showing Feedback feature.

Enabling/Disabling Showing Feedback

In order to enable/disable Showing Feedback, use the following steps:

1. Log into the **REALTOR® Lockbox Website**.
2. Go to the **Showing Feedback** tab.
3. Go to the **Showing Feedback Preferences** tab.
4. Check or uncheck the **Send showing feedback requests for my listings** checkbox based on your preference. By checking the box, Showing Feedback requests will be sent automatically. By leaving the box unchecked, the user has disabled Showing Feedback.
5. Press the **Save** button.

User Settings

To set up your Showing Feedback user preferences, use the following steps:

1. Log into the **REALTOR® Lockbox Website**.
2. Go to the **Showing Feedback** tab.
3. Go to the **Showing Feedback Preferences** tab.
4. Select the radio button for how you would like to receive Showing Feedback requests:
 - a. **Do not receive Showing Feedback notifications**
 - b. **Website notifications**
 - c. **Email and website notifications**
5. Select your default survey settings:
 - a. Check the box to **auto-assign default surveys to new listings**.
 - i. Select the default survey you would like to use from the drop down menu.
 - ii. Enter a name for the default survey (for example: **My Default Survey**)
6. Press the **Save** button.

Managing Surveys

A survey for a lockbox can only be created if the lockbox is assigned to the listing address.

Note: The reason for this is so SentriLock does not continue to send out feedback requests once the lockbox changes locations.

Creating a Survey

Use the following steps to create a survey:

1. Log into the **REALTOR® Lockbox Website**.
2. Go to the **My Lockboxes** tab.
3. Search for the lockbox you would like to create a survey for.
4. Click on the lockbox serial number.

5. If the lockbox is not assigned to a listing, assign the lockbox to a listing.
 - a. The **Edit Lockbox** page will reload when you assign the listing.
6. You can choose from the following options for the survey:
 - a. The name of the survey will default to the listing's street address but you can change this to something else.
 - b. Create Survey Options.
 - i. **Create New**: Creates a new survey with no predefined questions. You will define all of the questions from scratch.
 - ii. **Clone from Existing**: Creates a new survey with a copy of all of the questions from the survey to clone.
 - iii. **Use Default Survey**: This will use the survey designated as default in your Showing Feedback preferences.
 - c. Press the **Create Survey** button to create the survey.
7. On the **Edit Survey** page, choose the question type from the drop down menu and press the **Add New** button.
8. Fill out the **Question** page.
9. Press the **Save Question** button.
10. You will be taken back to the **Edit Survey** page. Repeat steps #7-#9 until desired survey has been created.
11. After you have successes added all the questions you would like to have, you can preview the survey by pressing the **Survey Preview** button on the **Edit Survey** page.
12. Press the **Activate Survey** button on the **Edit Survey** page when you are ready to activate the survey.
13. A message will indicate that the survey has been successfully activated.

Editing a Survey

You can edit a survey at any time by clicking the edit (pencil icon) from the **Edit Lockbox** page or the **Showing Feedback** tab.

If a survey:

- **Has not been activated:**
 - You can freely edit it.
- **Has been activated:**
 - And no one has taken the survey yet; you will be warned that the survey will be temporarily deactivated while you edit it.
 - And there have been responses, you will be warned that the current survey will be deactivated and archived. A new survey will be cloned from this survey.

Note: You can still go to the results of the old survey by going to the **Showing Feedback** tab and viewing archived surveys.

You need to remember to reactivate the survey when you are done editing it.

Previewing a Survey

You can preview a survey at any time by clicking the preview (magnifying glass) icon from the **My Lockboxes** tab, the **Edit Lockbox** window or the **Showing Feedback** tab.

Taking a Survey

When a survey is ready to be taken, a survey notification will appear across the top of the **Main Menu** after logging into the **REALTOR® Lockbox Website**. If the user has elected to receive email notifications, they will also receive an email with a link to take the survey.

Viewing Survey Results

You can review the results of a survey at any time by clicking the results (graph) icon from the **My Lockboxes** tab,



the **Edit Lockbox** page or the **Showing Feedback** page in the **REALTOR® Lockbox Website**. You have the option to do any of the following with your survey results:

- **CSV**
- **PDF**
- **CSV by Taker**
- **Display by Taker**
- **Print**

Removing a Survey

You can remove a survey at any time by clicking the delete (red x) icon on the **Edit Lockbox** page or the **Showing Feedback** page. After a survey has been removed, you can still view the survey in the **Showing Feedback** tab on the **REALTOR® Lockbox Website**.

Showing Feedback Emails

Showing Feedback email messages include a link to opt out of receiving Showing Feedback requests. For Agents that receive a Showing Feedback email and are part of the SentriLock system, they will see a link in the email that takes them directly to the **REALTOR® Lockbox Website** to take the survey (they are not required to login and cannot access any other pages in the website). For Agents that are receiving a Showing Feedback email and are not a part of the SentriLock system, they will receive an email with a link taking them directly to the survey. They will not be taken to the **REALTOR® Lockbox Website**.

Get Help

If you need further assistance in regard to managing Showing Feedback, contact SentriLock Support for further assistance.

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