How to customize your listings

Eliminate redundant questions so you can focus on what matters - your clients.

Automate every part of the showing process to reduce your workload, increase your efficiency and save time!

Picture this: a showing request comes in for one of your listings. Before you even open your phone, a confirmation is sent back including showing instructions and lockbox code, and your seller receives a text message, letting them know that someone will be coming by at the specified time.

In the following pages, we'll show you how to set all of this up.

A. Customize your showing settings

✅ In the Touchbase app's main menu, select **Listings > Choose Listing > Showing settings**.

Here you will be able to customize your showing instructions, lockbox information, and more.

✅ **Customize** your settings to **automatically** send a note with showing confirmations.

Automatic note sent with confirmation

There is a large dog in the back yard. Lock box is on the porch to the left of the door. Leave card. Off lights. Lock back door when finished.

Lockbox   01852364

Required notice   24h ▼

Allow double booking ☑

Note sent with confirmation

Enter the showing instructions that you would normally type out with each showing confirmation.
These instructions will automatically be sent out **every time you confirm a showing**.
BONUS: The Lockbox code can also be included in the field below it.

Required notice

This refers to how much time the seller wants to have between **the time of the showing request and the visit.** For example, if 24 hours is chosen, any attempt to request a showing within 24 hours of the visit will prompt a message to choose a different time.

Double bookings

Choose whether or not to allow more than one visit at the same time.

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B. Create listing notes

Listing notes are public and visible to any agent who looks up your listings in Touchbase or MLS.

Like User notes, **Listing notes** can be filtered to show only on certain days or during certain time periods. For example, you could decide to show the note only on Wednesdays between 3 p.m. and 6 p.m. from January 17th to February 26th.

- ✅ In the app's main menu, select **My Listings > Choose Listing > Listing notes**.
- ✅ Click on **Add a note** and write your message. You can then add a start and end date, specific time of day, and even specific days of the week during which to display the note.

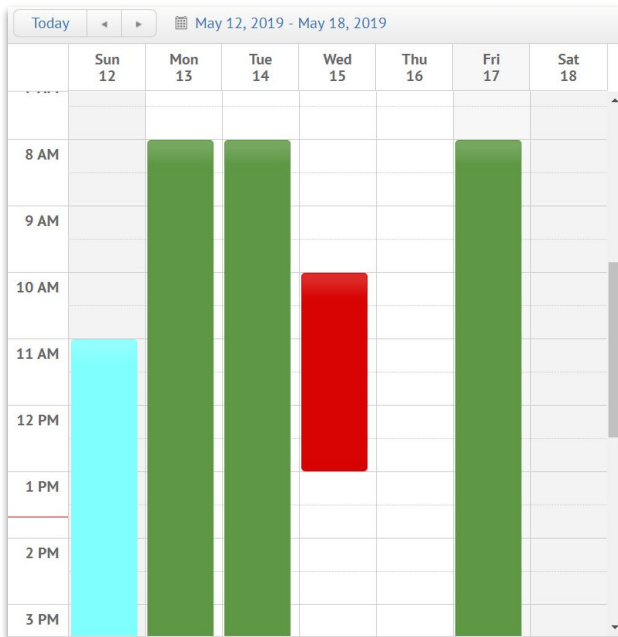## C. Set your showing availabilities

- ✅ Go to **My listings > Select the listing > Showing availability**.
- ✅ To **pre-approve***, block a showing time or add an open house, click the corresponding date in the Availability Calendar.
- ✅ Select the **Type of availability** (Pre-approved, Open house or Not possible) **> Add the Start and End time > Choose to either Repeat this availability on a weekly basis, or just once**.
- ✅ Click **Save**.

* If you set up a pre-approved time, make sure to enter instructions in **Showing Settings** as shown on the previous page.

Availability	✕
Type	▾
Start	☐ Open house
	☐ Pre-approved
End	☐ Not possible
Repeat	Never ▾
	Save Cancel

Availability	✕
Type	Pre-approved ▾
Start	9:00 AM �🕑
End	9:30 AM �🕑
Repeat	Never ▾
	Never
	Weekly
	Save Cancel

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Take John, the showing agent, as an example:

John finds your listing through his MLS. He can see your **Listing notes**, and can see what **dates and times are pre-approved** for showings. John can also see the **required 24-hour notice** before the showing, and once he chooses the date and time that works for his client, he receives an **automatic confirmation**, complete with **showing instructions and lockbox code**.

Since you are a power user, you've also set up your **automatic feedback request**; once the showing is done, Touchbase will send John your **customized feedback form**, giving you all the information you need to provide your client with impeccable service.

Customize your settings and use this freed up time to deal with the important stuff: Your Clients!