ALIGNED SHOWINGS®

Web Application User Guide

Version 2.0

September 2024

Contents

Introduction

Aligned Showings is a full featured showing tool for real estate agents that provides an easy and convenient way to manage and schedule showings and communicate with other agents about the showings.

Aligned Showings is brought to you by MLS Aligned, a group of forward-thinking Multiple Listing Services focused on building industry-leading technology.

This user guide provides information on the Aligned Showings web application. For information on the Aligned Showings mobile application, please refer to the Aligned Showings Mobile Application User Guide.

Aligned Showings Features

Integrates with your MLS

Aligned Showings works with your MLS App, allowing you to select listings for appointments directly from the MLS software.

Web and Mobile App

Aligned Showings is accessible via a web browser and mobile app and you can switch effortlessly between them.

Easy and Comprehensive Scheduling

Aligned Showings offers a simplified experience when scheduling listing appointments. Edit, reschedule, or cancel showings with ease, and share appointment information with co-listing agents, office assistants, sellers/tenants, and buyers.

Route Optimization

Planning your day just got easier with route optimization. Add the listings and any additional stops, order them to suit your needs or calculate the fastest route, then send all showing requests at once.

Real-Time Chat Messaging

Running behind or stuck in traffic, no problem. Aligned Showings offers a unique, integrated messaging feature that sends real-time chat notifications and keeps all relevant showing appointment information organized in one place.

Showing Preferences

Every listing agent and every property has unique appointment needs. From instant approvals to custom responses, advance notice to overlapping appointments, Aligned Showings provides a flexible showing system that works for you.

Collaboration Tools

Collaboration is easy with Aligned Showing's involvement features. Sellers, tenants, assistants, and showing coordinators can quickly approve or decline showings or track a listing's showing activity.

Calendar Efficiency

Do you know in advance when a seller or tenant prefers to skip showings? Drop down menus in Aligned Showings make calendar blocking effortless for listing agents to set up and easy for showing agents to interpret.

Notification System

Never miss a showing request or important information again. Receive Aligned Showings notifications by email, text, alerts or push notifications.

Customizable Feedback Surveys

Ask the questions that matter to you after a showing with custom feedback surveys and request feedback automatically after appointments.

System Requirements

We recommend the following system requirements for the most optimized experience using the Aligned Showings web application.

General Requirements

- 200 MB of free disk space
- 512 MB of free RAM
- Internet connection
- Minimum 10-inch display with 1024x600 screen resolution

Operating system requirements

- Microsoft Windows 7 or later
- macOS® 10.12 or later

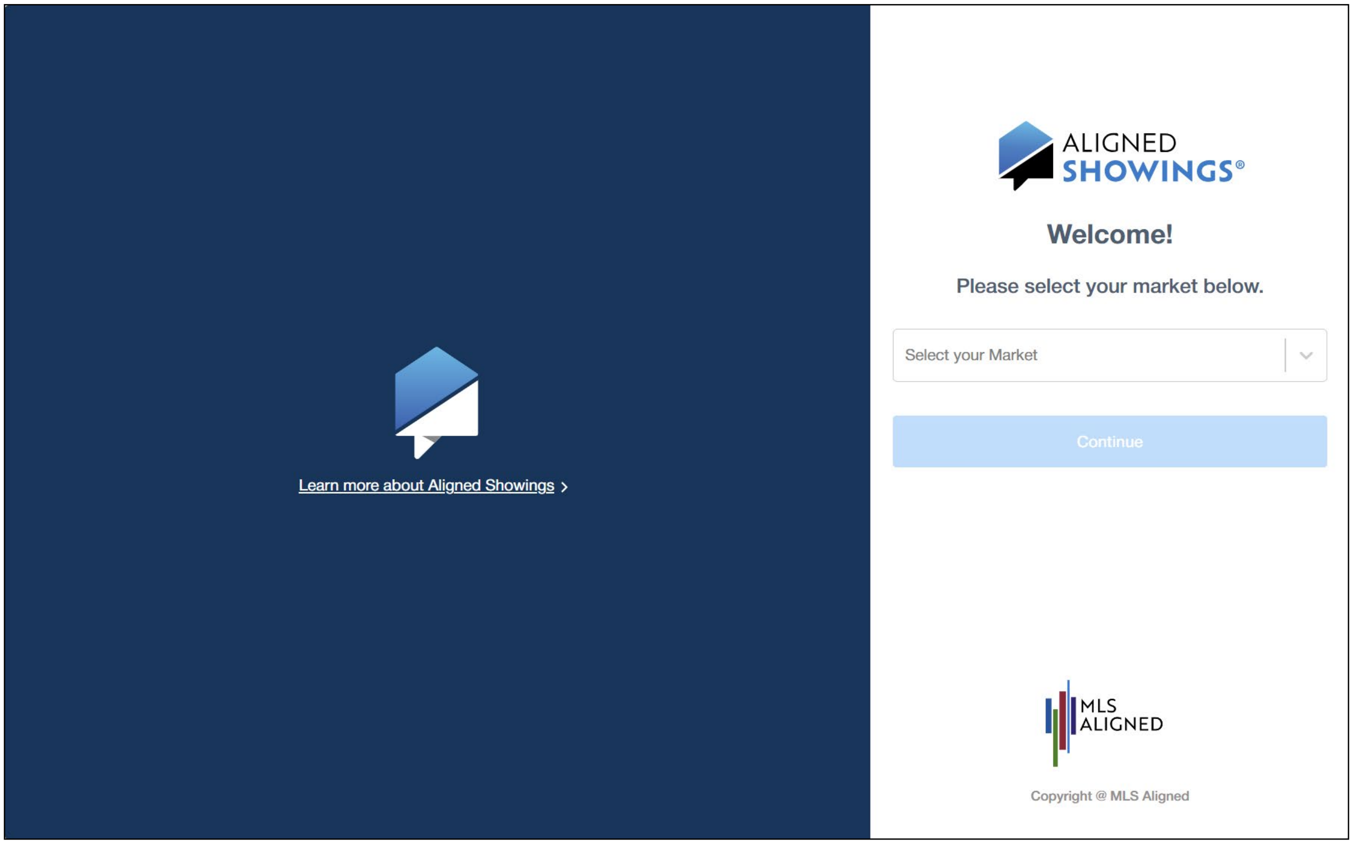
Supported browsers

- Google Chrome™
- Mozilla™ Firefox™
- Microsoft Edge
- Safari®

Login to Aligned Showings

To login to Aligned Showings:

1. Navigate to https://alignedshowings.com

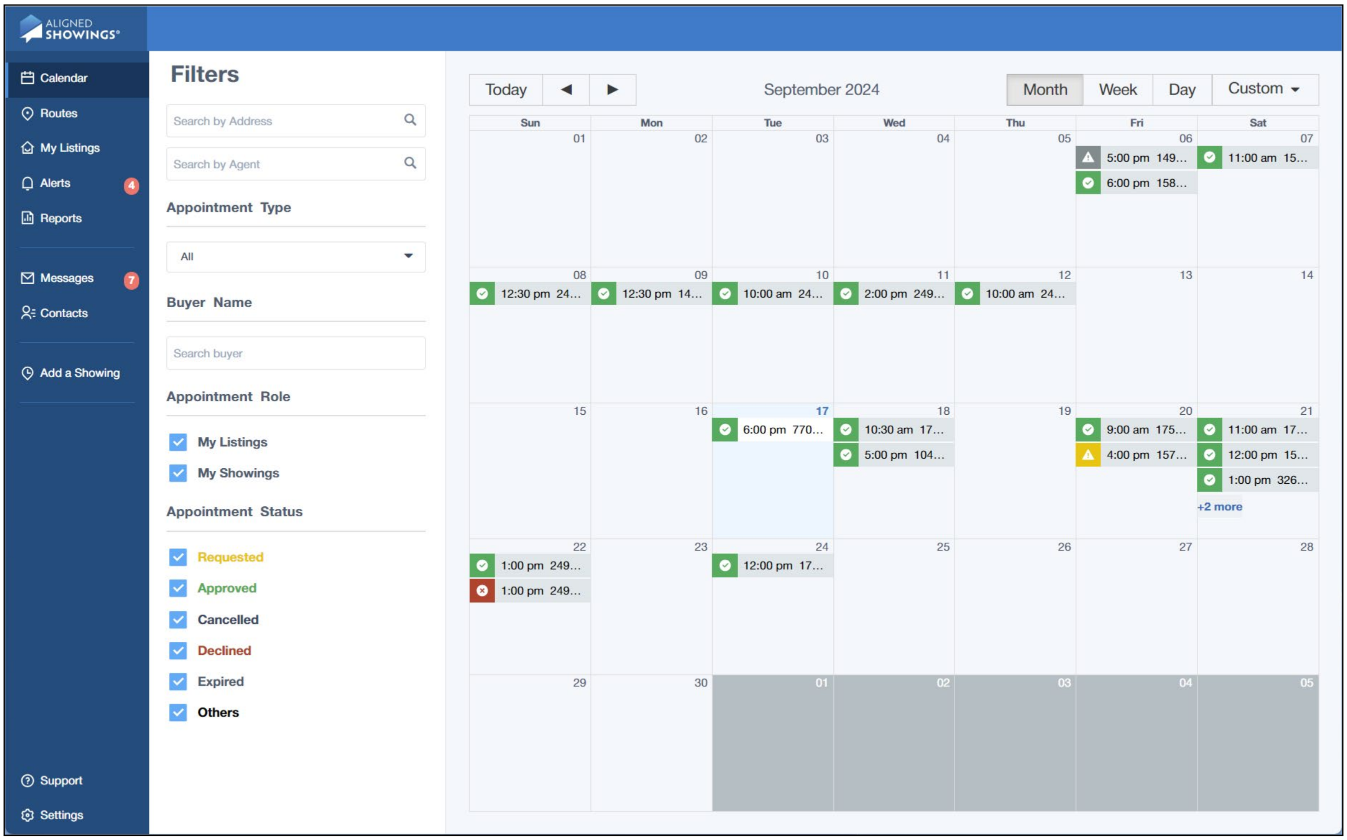


2. Select your market and then select **Continue**.
3. Enter your MLS login and password and login. The Aligned Showings Dashboard is displayed.

   Note: The first time you login, you can view and accept the End-User Agreement. You can view the End-User Agreement at any time by selecting the **Settings** menu and then **Privacy and Terms**.

Overview

When you login to the Aligned Showings web portal, the Dashboard is displayed.



The **Navigation Menu** on the left contains links to common tasks you can perform.

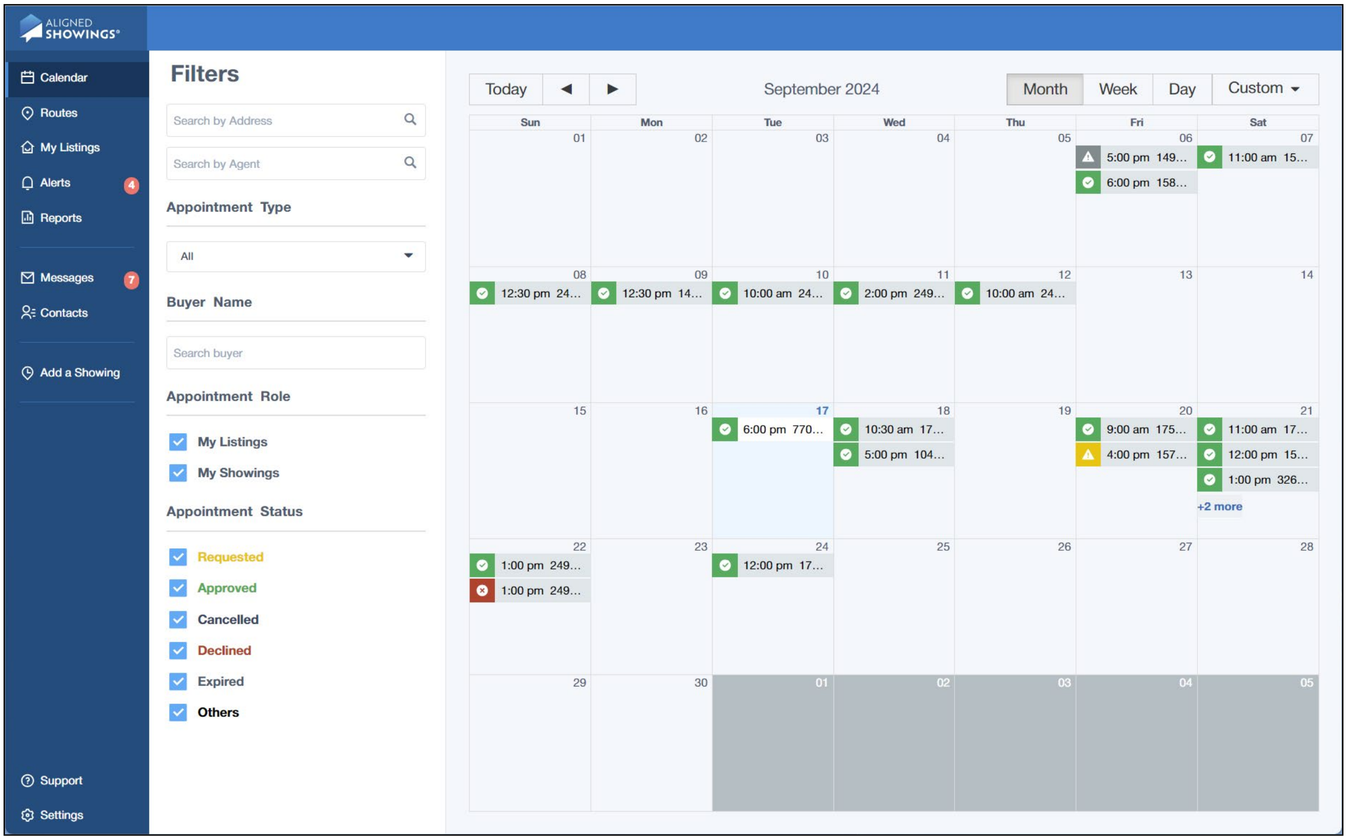
- **Calendar** - View showing requests and appointment details by selecting a showing
- **Routes** - Schedule multiple showings in a day and view routes
- **My Listings** - View and set showing preferences for your listings
- **Alerts** - View Aligned Showings notifications
- **Reports** - View activity reports
- **Messages** - View showing conversations and send messages
- **Contacts** - View agent, seller/tenant, and buyer contact information
- **Add a Showing** - Create a showing request
- **Support** - View support contact information
- **Settings** - System, profile, and feedback survey settings

Note: If the Routes or Contacts menu options are not available on your left navigation menu, your MLS has opted out of these features.

The Aligned Showings logo in the upper left corner serves as the **Home** button to return to the Dashboard.

Calendar

The CALENDAR serves as the home screen, and allows you view and interact with showing requests and appointments.

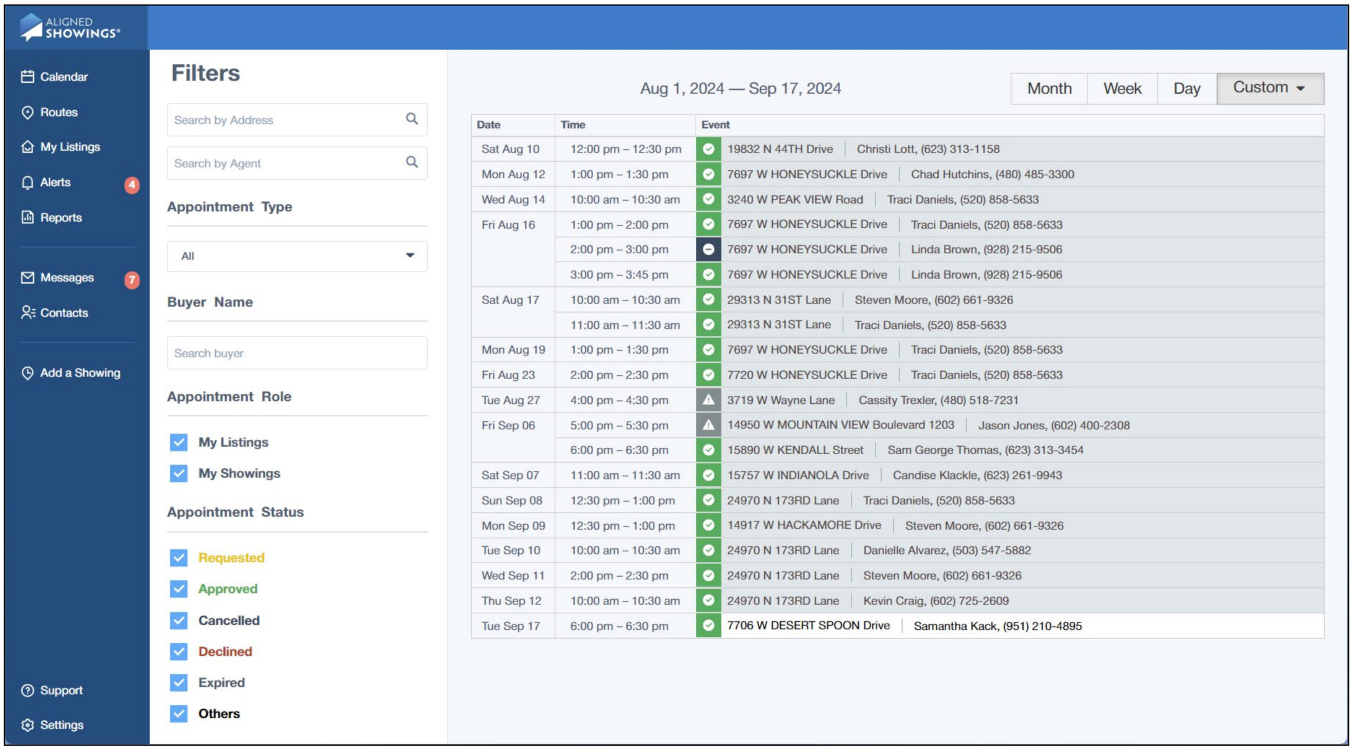


You can use the **Filters** section to filter the calendar display by:

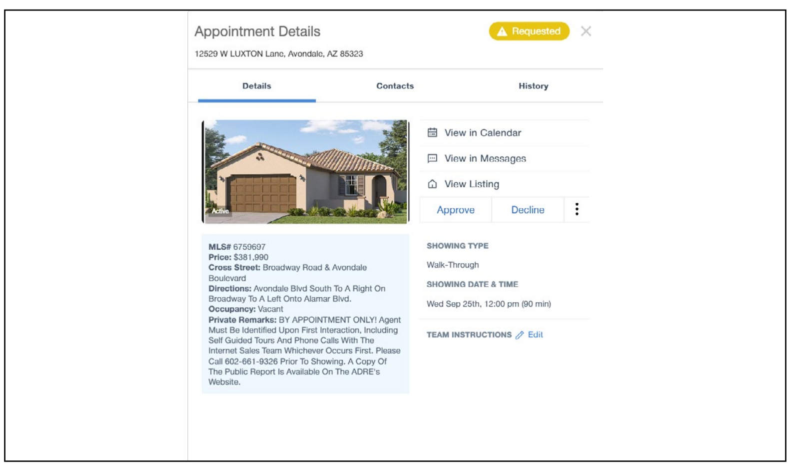
- Address or listing ID
- Agent name
- Appointment type
- Buyer name
- Appointment role (Listings, Showings)
- Appointment status (Requested, Approved, Cancelled, Declined, Expired, Others/ Non-MLS)

The date controls allow you display the calendar for today, or the previous or next date range. You can also change the view to display the calendar by month, week, or day, or a custom date range.

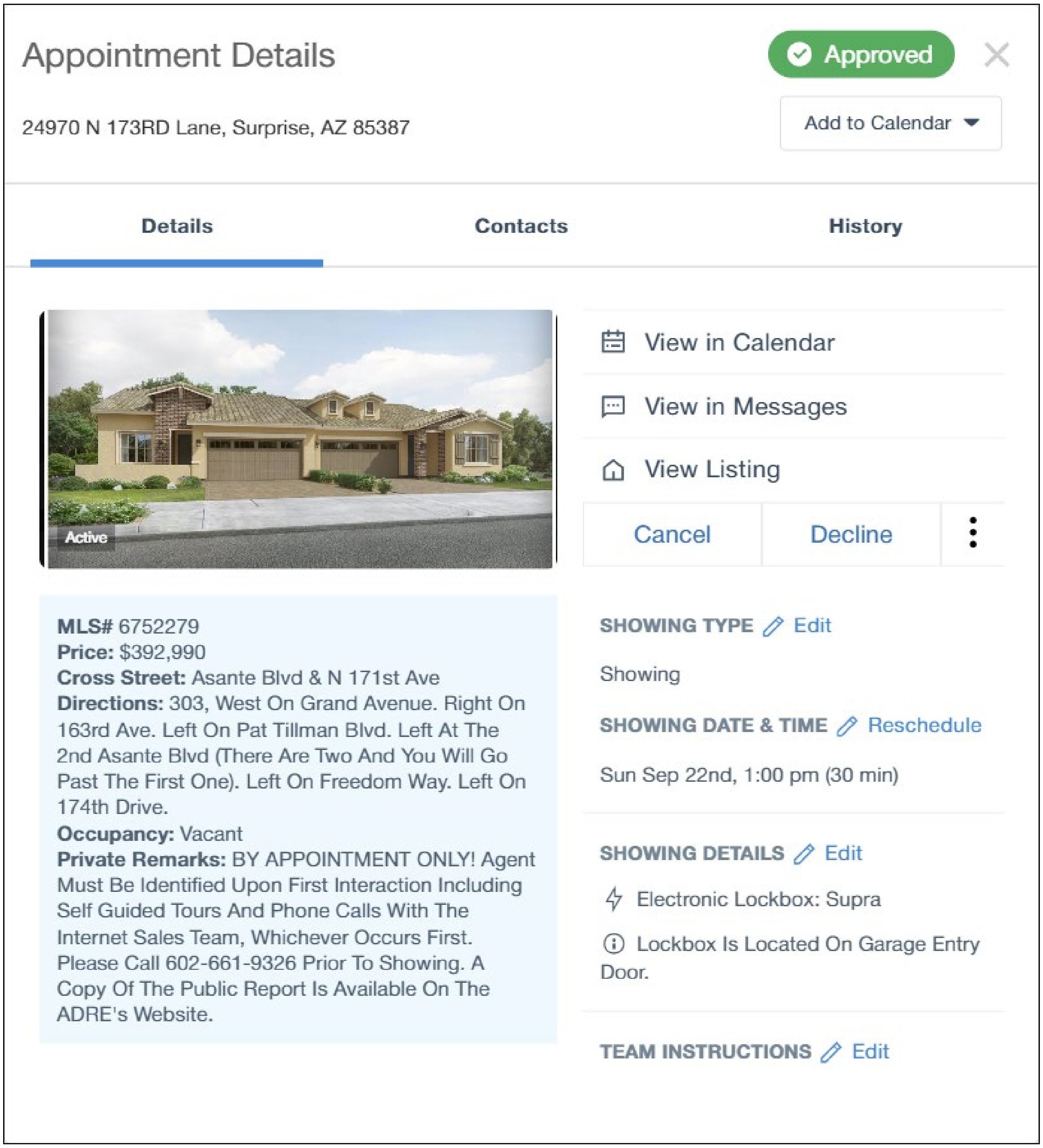
The week view and custom date range both display the showing agent information for the showing appointment.



Select a showing on your calendar to view details about the showing details.



Select **More Details** to view more information about the showing.



Settings

The SETTINGS menu options lets you set your profile and system settings.

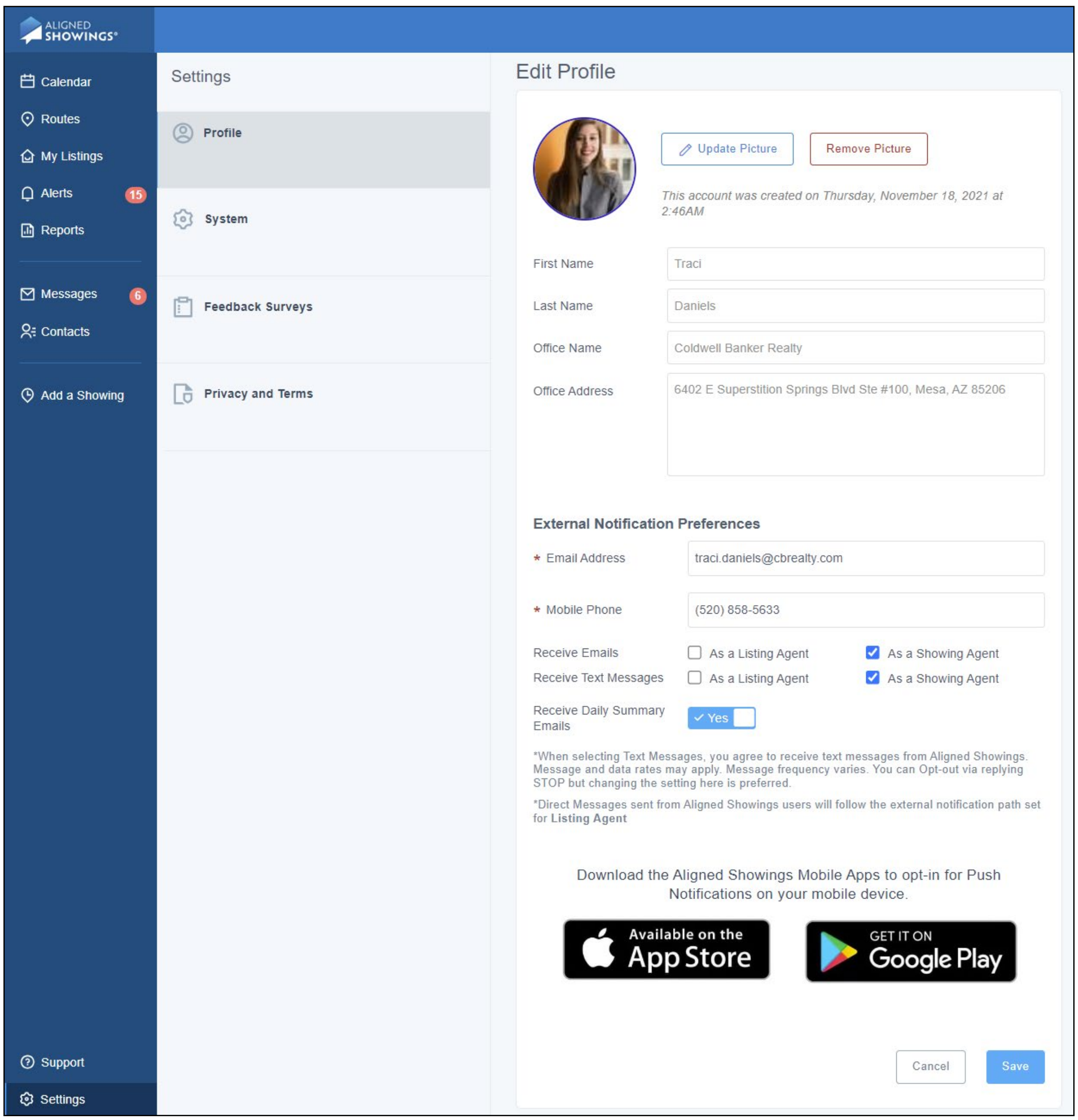
Profile Settings

The Profile Settings menu option gives you the ability to:

- Upload a profile picture
- View your name and office information
- Update your contact information for notifications
- Set your external notification preferences and daily summary email preference

To view or edit your user profile settings:

1. Select **Settings** from the main menu on the Aligned Showings Dashboard. The Edit Profile screen is displayed.



2. Select **Update Picture** and choose a photo.

   Note: Either PNG and JPG file formats can be uploaded for your user photo. Your photo will appear throughout Aligned Showings in Messages, in the Calendar showing appointment details under Contacts, and in Contacts.

   Tip: Your profile photo will automatically be compressed and reduced to a lower resolution so it is best to use a clear, high-contrast image.

3. Select **Remove Picture** to delete your profile photo.
4. Your name, office name, and office address are displayed.

   Important! Your name, office name, and office address is the information on record with your MLS. The information can't be changed in Aligned Showings. Contact the MLS to make changes to your name, office, or office address.

5. Scroll down to view or edit your external notification preferences.
6. Update your email address and mobile phone number for notifications, if needed.
7. Check whether to receive emails and text messages as a listing agent, as a showing agent, or both.

   Note: If you elect to not receive email or text message notifications, be sure to check for messages and alerts in Aligned Showings.

   Important: If you elect to not receive email or text message notifications as a listing agent, you will not receive email or text notifications for direct messages sent from Aligned Showings.

8. Select whether you would like to receive the automatic daily summary emails detailing your showings for the day.
9. Scroll down and select **Save** to save any changes.

System Settings

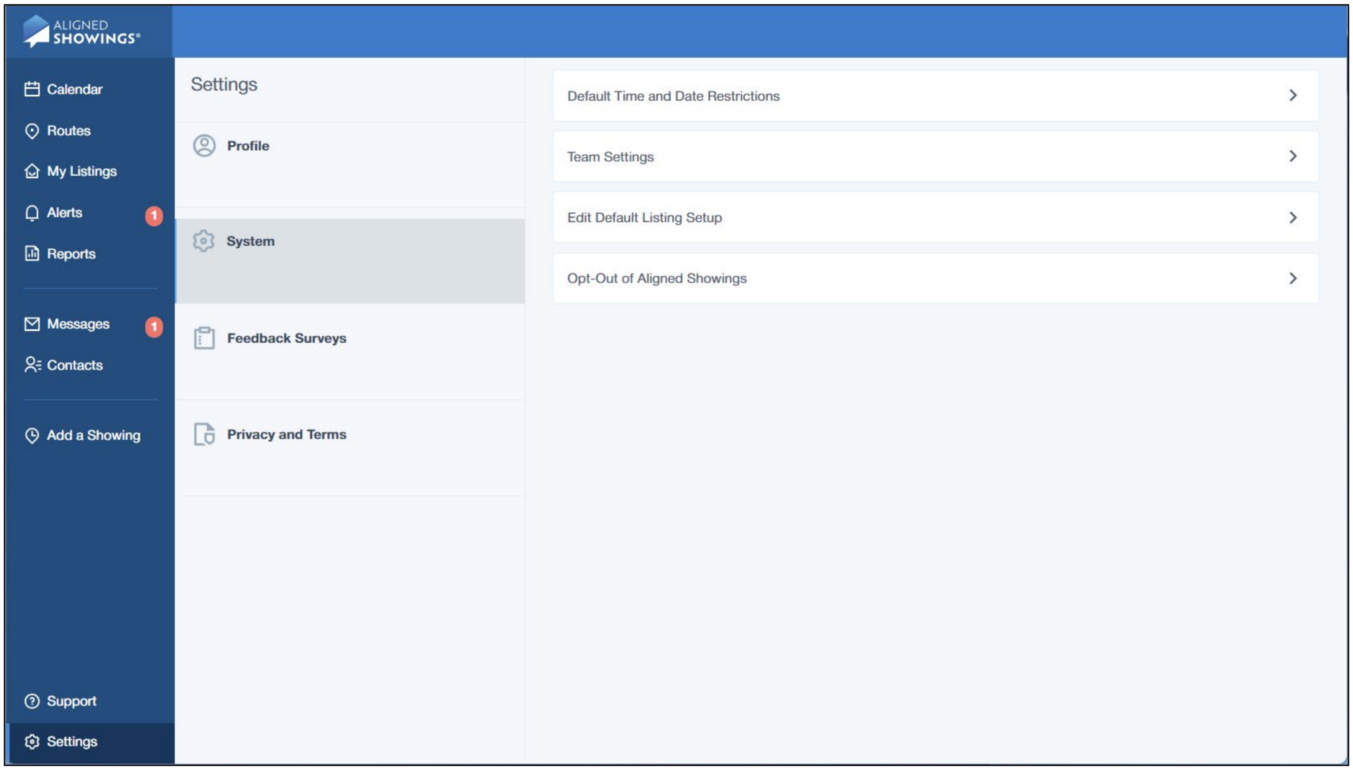
The System Settings menu option gives you the ability to:

- Set default time/date restrictions for *new* listings
- Add team members (such as assistants, co-listing agents, or showing coordinators) to *new* listings. Note that this setting only affects your new listings that are added after you save the preferences.
- Set default team instructions for *all* listings (note that this applies to existing and new listings)
- Set default listings settings for *new* listings
- Opt out of receiving showing requests from Aligned Showings for your listings (depending on the preferences selected by your MLS)

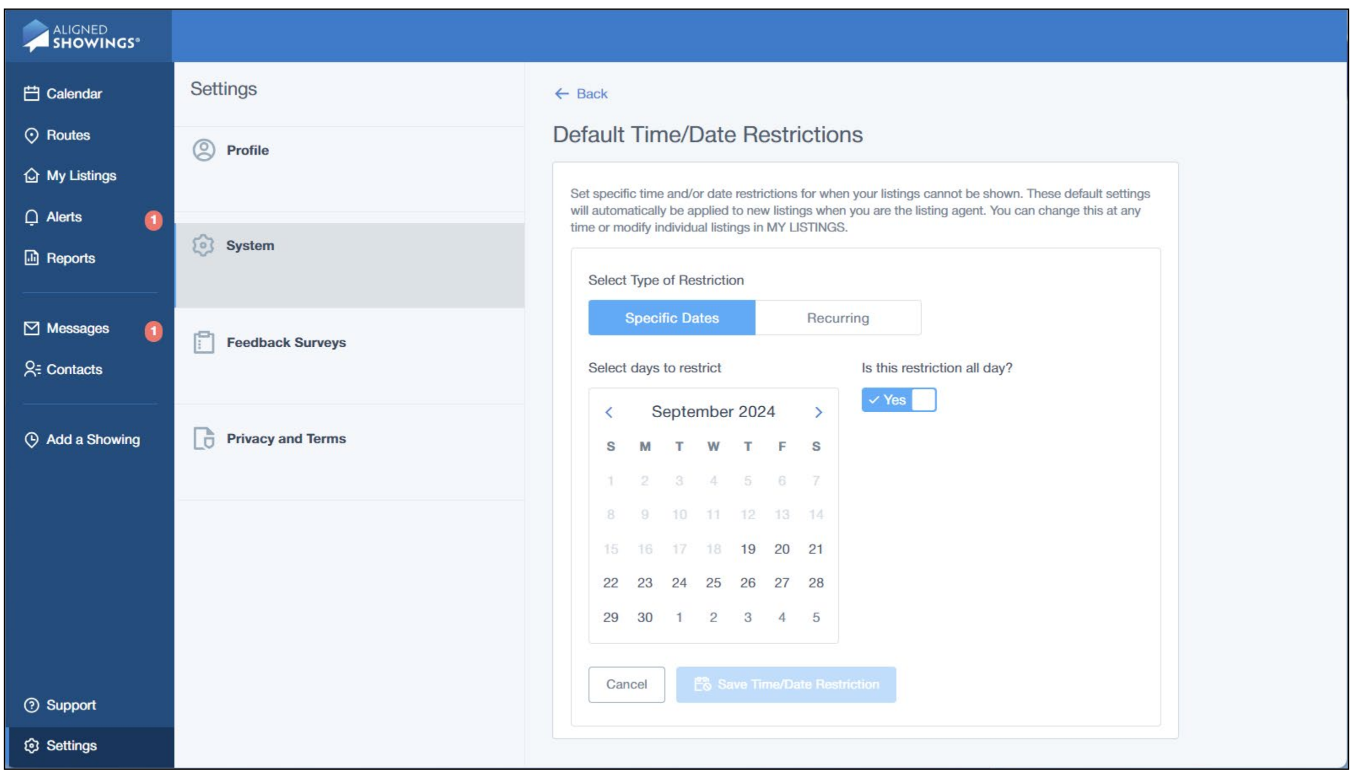
To set the default time/date restrictions for your future listings:

1. Select **Settings** from the navigation menu on the Aligned Showings Dashboard.

2. Select **System**.



3. Select **Default Time and Date Restrictions**.
4. Select **Add Time/Date Restriction**. A calendar is displayed. Choose the **Specific Dates** tab to restrict showings on a specific date or multiple dates.



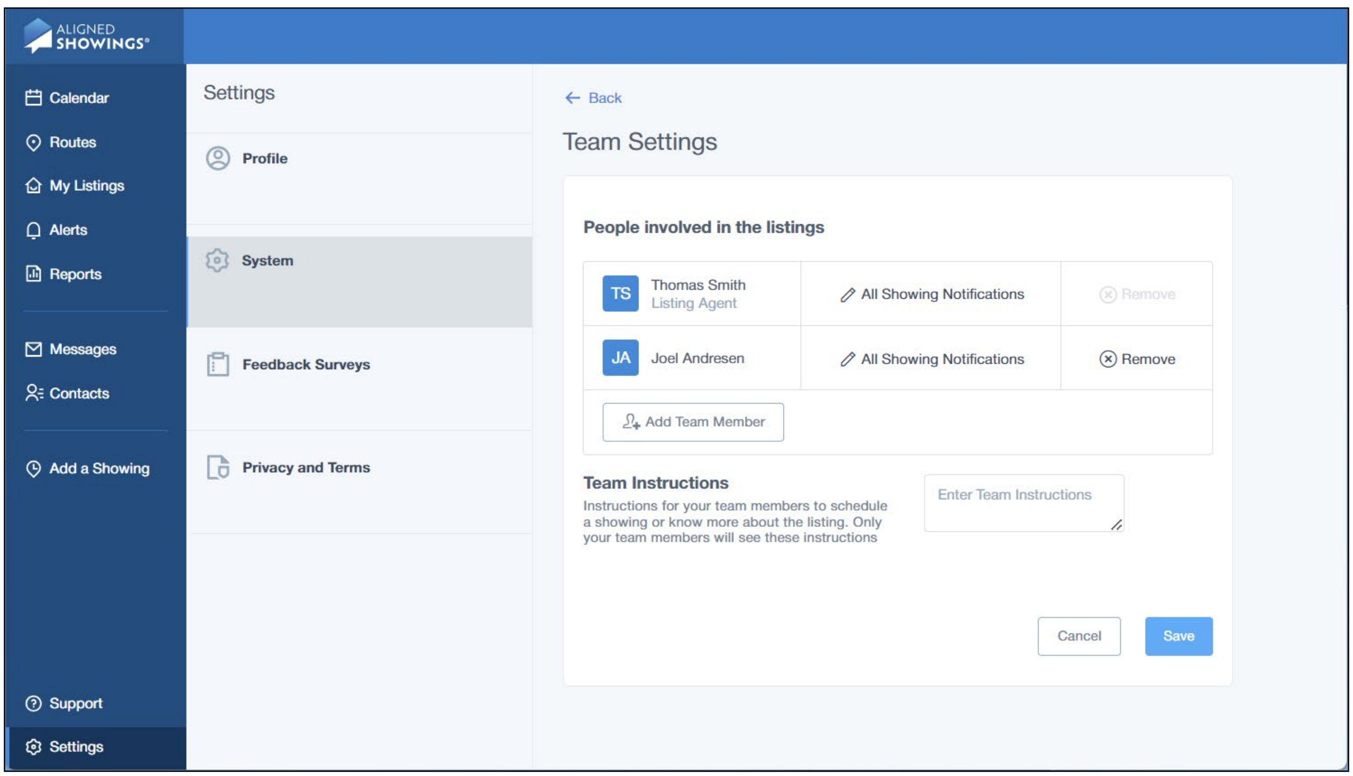
5. Select the day of the month to restrict showings on that date. Multiple dates can be

selected.

6. Select **Yes/No** to indicate if the restriction is all day.
7. If the restriction is not all day, select the time range showings should not occur. Select **+Add Another** to add multiple ranges of time in the dates selected.
8. Select **Add Time/Date Restriction** when you have completed the selection.
9. Choose the **Recurring** tab to set restrictions for recurring times, such as every Tuesday from 8:00 AM to 9:00 AM.
10. Select the days of the week to block showings.
11. **Yes/No** to indicate if the restriction is all day.
12. If the restriction is not all day, select the time range showings should not occur. Select **+Add Another** to add multiple ranges of time in the dates selected.
13. Select **Save Time/Date Restriction**.

To add team members to your future listings, or change the team instructions for current and future listings:

1. Select **Settings** from the navigation menu on the Aligned Showings Dashboard.
2. Select **System**.
3. Select **Team Settings**. The Team Settings screen is displayed.



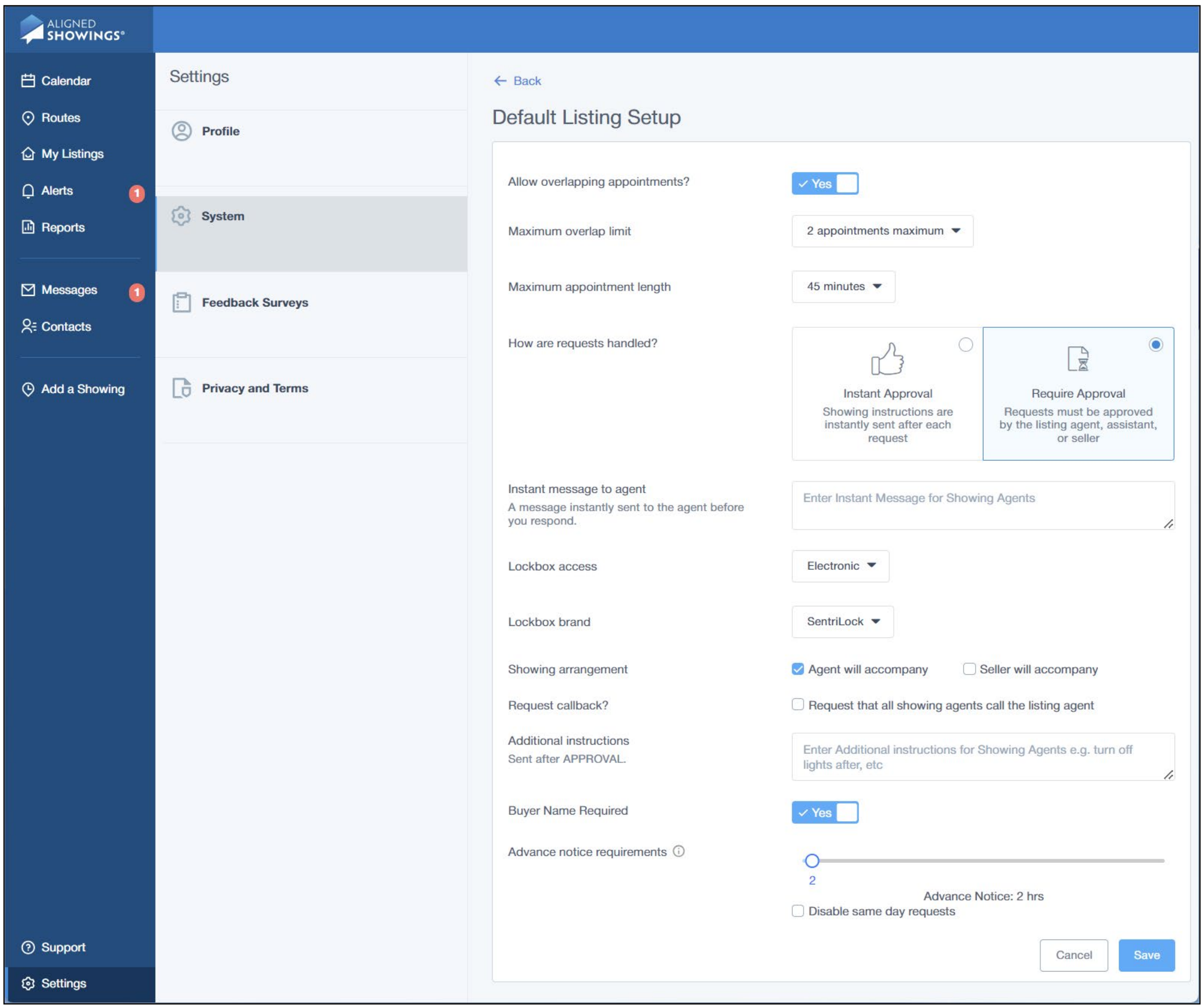
4. Select **Add Team Member** to add a person from your office to all of your *new* listings.
   a. Begin typing the contact's name, then choose them from the list.
   b. Select the notification preferences.
   c. Select whether to include the calendar file attachment if they are receiving notifications.
   d. Select **Save Team Member**.

5. Select **Remove** to remove a team member from all of your listings going forward. This does not remove them from any current listings.
6. Enter any Team Instructions that you want to add to all of your current and new listings.
7. Select **Save**.

Any contacts added in System Settings will automatically be added as team members to all of your showing requests for any new listings you add after you save the preferences. Team members can manage showing preferences and showing appointments. This can also be modified for individual listings. See ***Office Involvement*** for more information.

To set the default listing settings for your future listings:

1. Select **More** from the Aligned Showings navigation menu.
2. Select **Settings**.
3. Select **System**.
4. Select **Edit Default Listing Setup**. The Default Listing Setup screen is displayed.

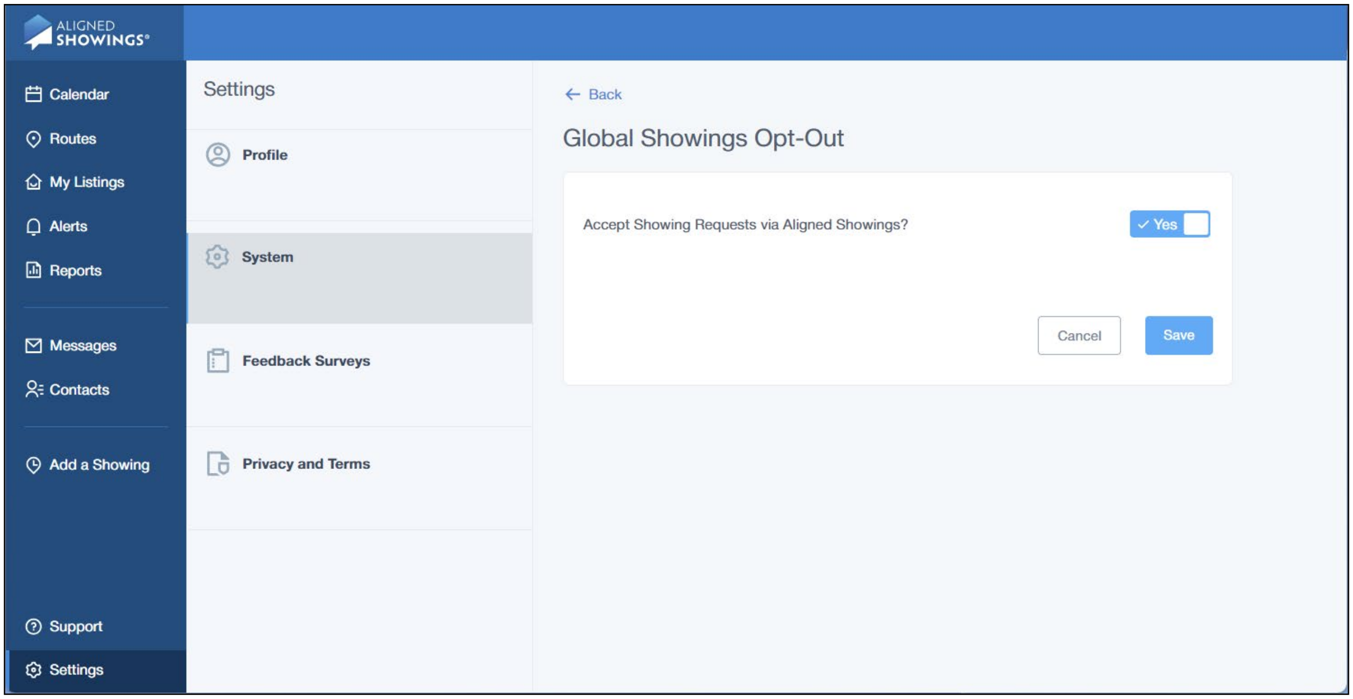


5. Select your showing preferences for your future listings. See ***Manage Showing***

[*Instructions for Your Listings*](#) for detailed information on each of the options.

To opt out of receiving showing requests for your listings:

1. Select **Settings**.
2. Select **System**.
3. Select **Opt-Out of Aligned Showings**.



4. Select **Yes** to **Accept Showing Requests via Aligned Showings** or **No** to decline receiving showing requests for your listings in Aligned Showings.

   Important! If you opt out accepting showing requests, your listings will NOT be available for showing requests using Aligned Showings. This setting will be turned on when you begin using Aligned Showings. Only turn this off if you do not want to your listings available for showing requests in Aligned Showings.

   Note: Depending on the preferences selected by your MLS, you may need to contact your MLS to opt a listing out of Aligned Showings.

5. Select **Save**.

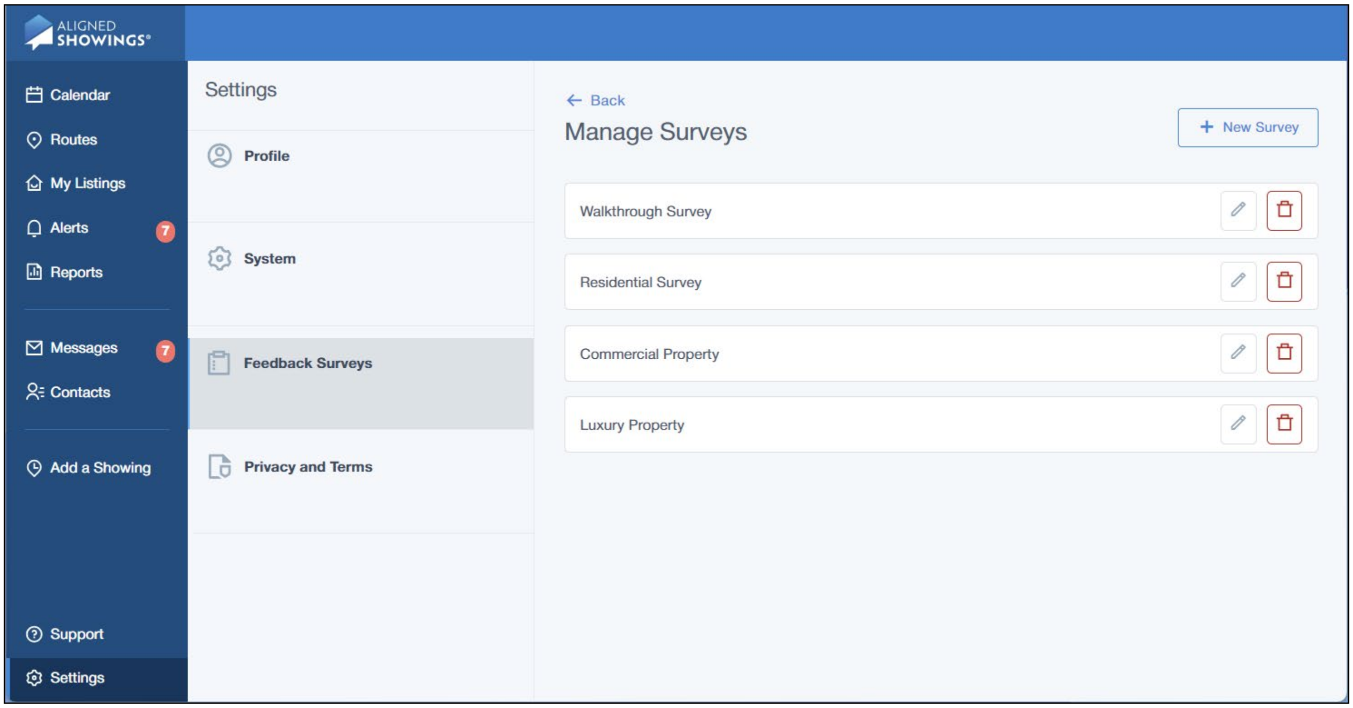
Feedback Survey Settings

The Feedback Surveys menu option in **Settings** gives you the ability to create and manage custom feedback surveys sent to showing agents after a showing, and set the default survey settings for new listings.

To manage a custom feedback survey:

1. Select **Settings** from the navigation menu on the Aligned Showings Dashboard.
2. Select **Feedback Surveys**.

3. Select **Manage Surveys**. The Manage Surveys screen is displayed.



4. Select **New Surve**y to create a survey.

5. Enter the survey name.
6. Enter a survey question.
7. Enter the answer options for the recipient to choose from.
8. Select **New Option** to add more answer options.

9. Select **New Question** to add another question.

   Note: A custom survey can have up to 10 questions.
10. Click **Create** to save the custom feedback survey.
11. To edit a survey, select the **Edit** icon next to the survey name. You can then edit the questions and answer options. Select **Remove Question** to remove a question, or **Remove** to remove an option, or add questions or options. You can then select **Save** to save the survey under the same name, or **Save as new** to save it as a new survey.
12. To delete a survey, select the **Delete** icon next to the survey name.

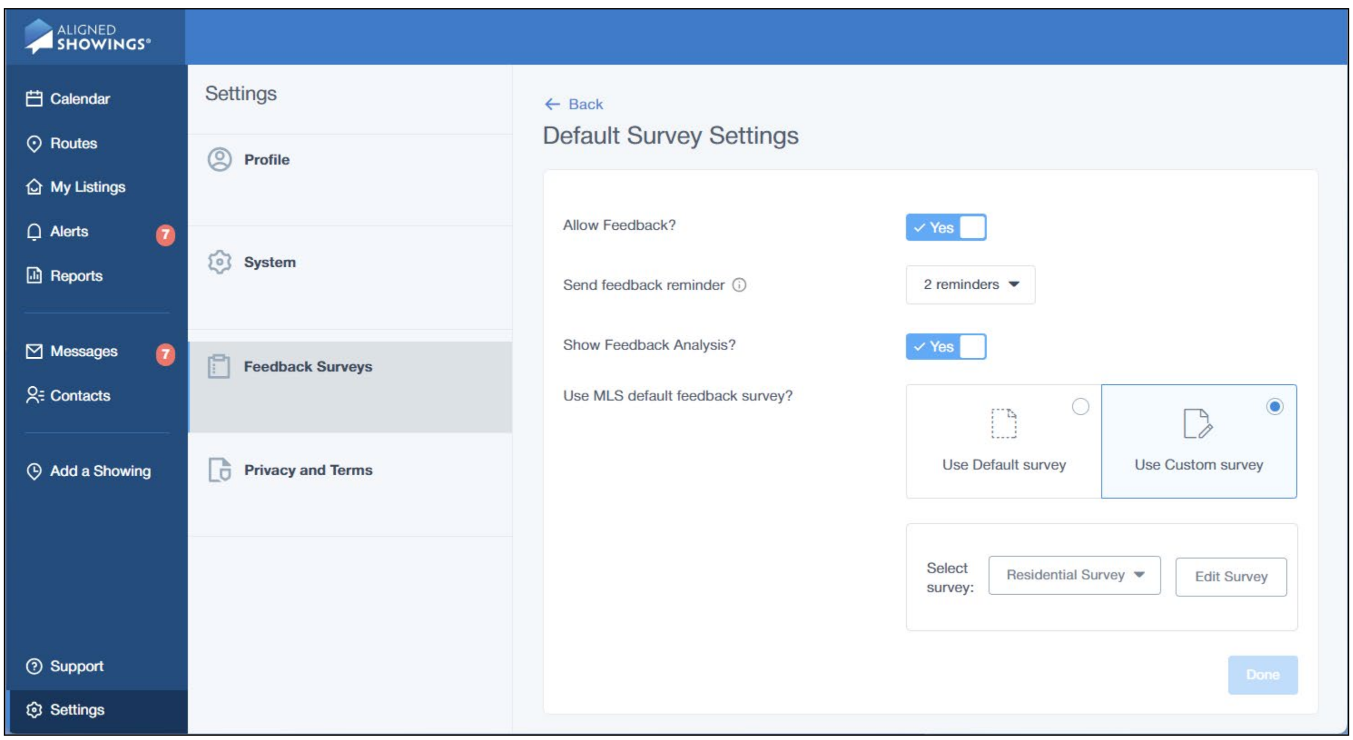
Feedback surveys can be assigned to a listing in **My Listings**. See ***Feedback Survey*** for more information.

Tips!

- If a custom survey is changed, it will change for all the listings assigned to it.
- If you are editing a survey and you do not want the edited survey to affect any listings it is assigned to, select Save as new to create a new survey.

To set the default feedback survey settings for new listings:

1. Select **Settings** from the navigation menu on the Aligned Showings Dashboard.
2. Select **Feedback Surveys**.
3. Select **Default Survey Settings**. The Default Survey Settings screen is displayed.



4. Select **Allow Feedback** to set whether you would like a feedback request automatically sent to the showing agent after a showing for new listings.
5. Select the **Request feedback reminder** dropdown to set the number of feedback reminders to go out. You can select between 2 and 6 reminders to be sent out after an appointment. Once the feedback survey is completed, the reminders are no longer sent out.

6. Enable **Show Feedback Analysis** to include a system generated positive or negative indicator for each response for new listings.
7. Select **Use Default Survey** to use the default survey for new listings.
8. Select **Use Custom Survey** to use a custom survey for new listings, and then select the survey from the dropdown.
9. Select **Done**.

Showing Preferences

You can easily set the showing instructions for your listings to determine how showings are scheduled, when they can be scheduled, who can view, manage and approve showing requests, and what feedback to request after a showing.

Tip! Showing preferences for a listing can be set by the LISTING AGENT and any others designated as involved in the listing through Office Involvement. See ***Office Involvement*** for more information.

Manage Showing Instructions for Your Listings

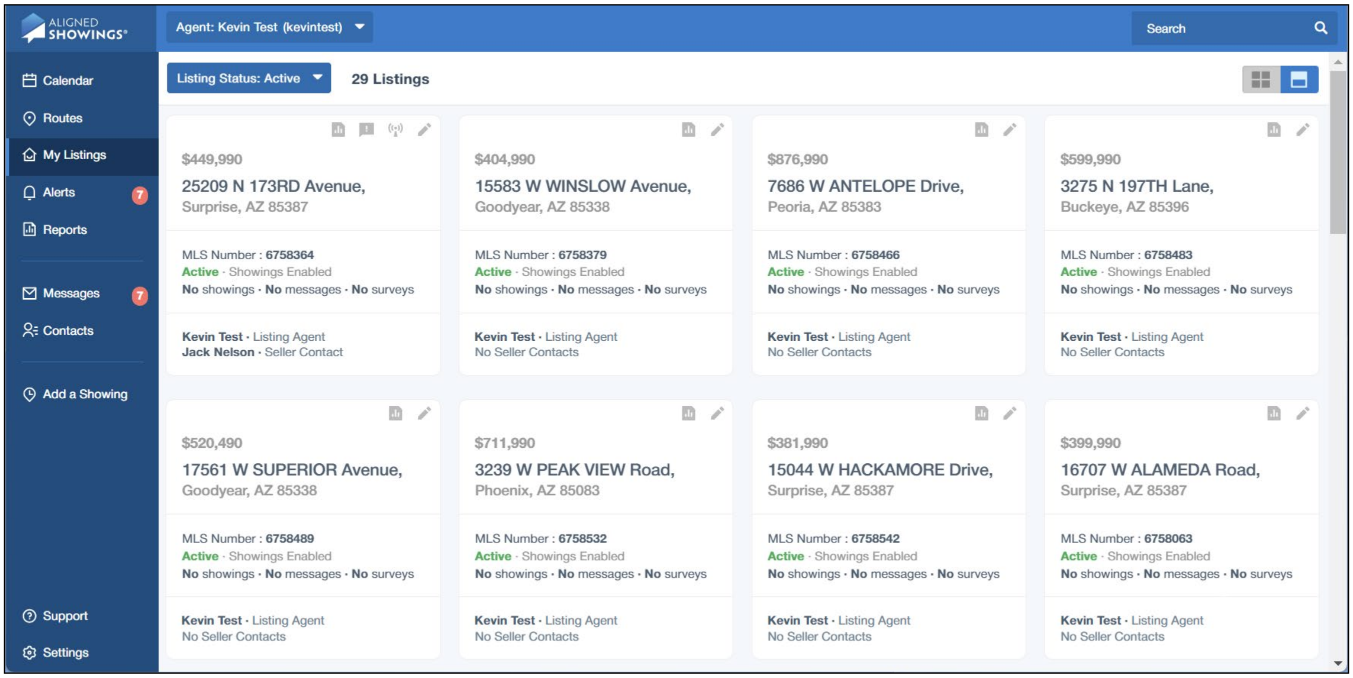
The showing instructions you can set are:

- Opt a listing in or out of allowing showing requests
- Set a listing to allow/disallow overlapping appointments and determine the maximum number of overlapping appointments
- Set the maximum appointment length
- Set up listings for instant approval or require approval
- Add agent messages to be sent to any appointment requests that require approval
- Select lockbox access type and enter a code for a combination lockbox
- Set default for agent and/or seller to attend each showing appointment, and to request that showing agents call the listing agent
- Select if a buyer name is required on appointment (if feature is selected by your MLS)
- Add additional messages for all appointment viewers
- Select the amount of notice required in advance of a showing appointment

To view your listings:

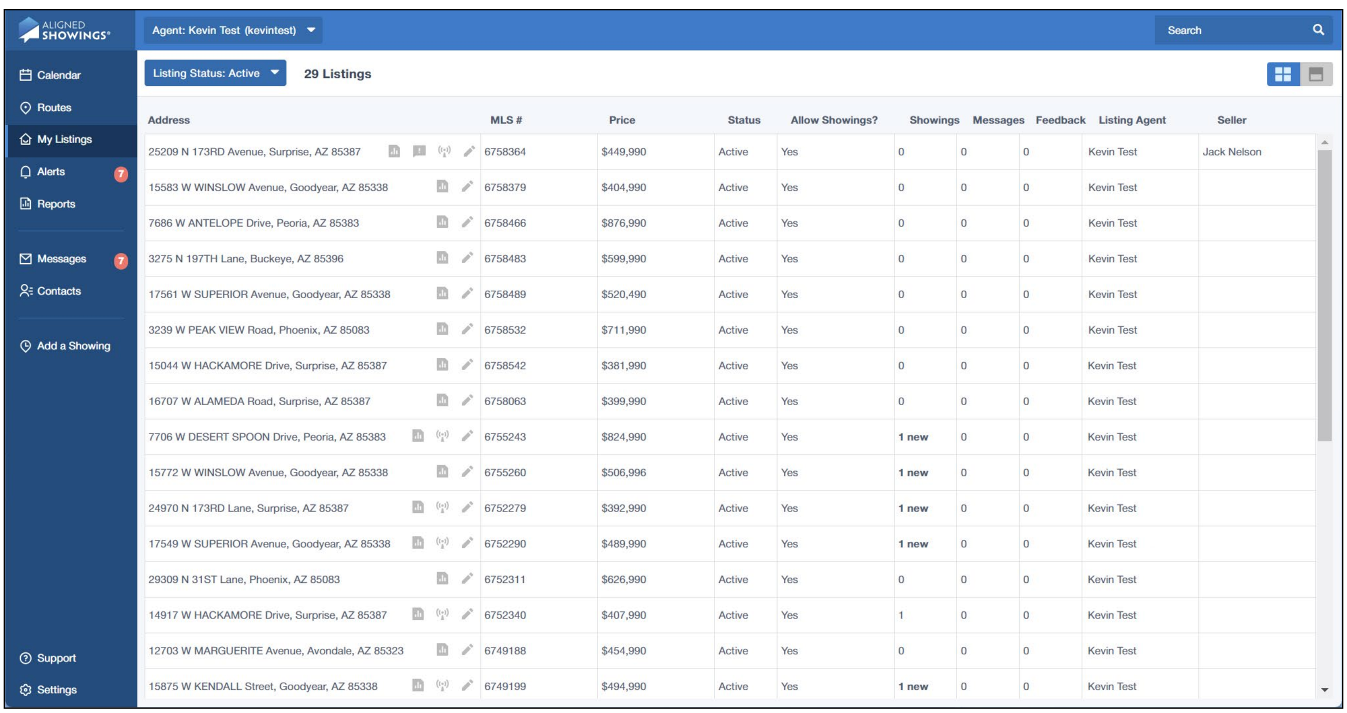
1. Select **MY LISTINGS** from the Aligned Showings navigation menu. Your active listings

are displayed in a card view.



a. Select the **Agent** dropdown in the upper left to display listings of agents who have added you as a team member in OFFICE INVOLVEMENT.
b. Select the **Listing Status** in the upper left to display listings with a certain status.

2. Select the button in the upper right corner to switch from card view to table view.



3. There are several icons that could be available for each listing.

   a. Select the **Download Activity Report** icon to view a report of showings on the listing. See ***Reports*** for more information.
   b. Select the **View Feedback** icon to view feedback from showings for a listing, and to approve feedback for a seller/tenant to view. See ***Showing Feedback*** for more information.
   c. Select the **Download Buyer Report** icon to view a list of buyers for the listing. See ***Reports*** for more information. Note that this feature is only available in Metro MLS.
   d. Select the **Broadcast Message** icon to send a message to the showings agents for the listing. See ***Messages*** for more information on sending a broadcast message.
   e. Select the **Edit listing setup** icon to set the showing preferences for your listing.

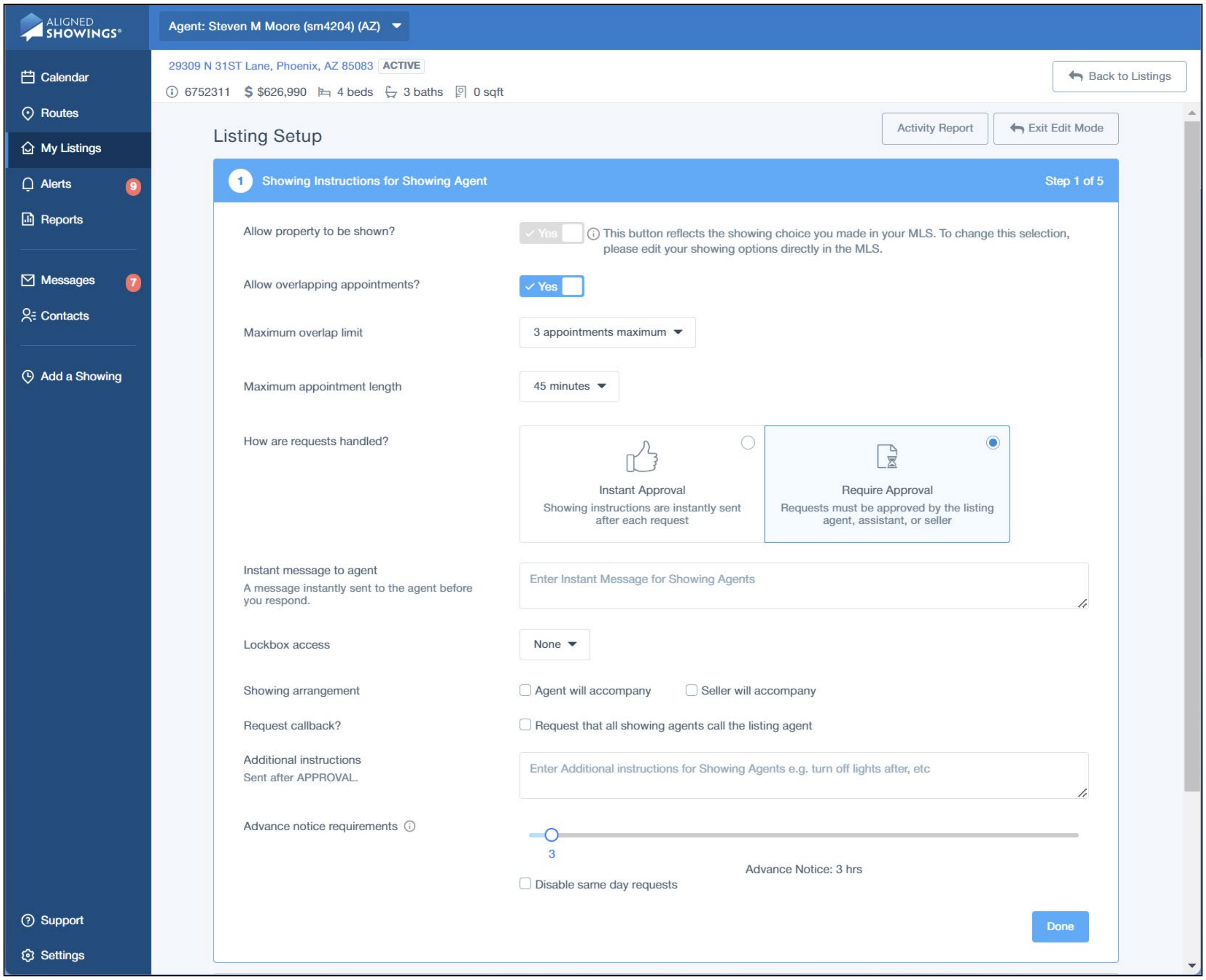
To manage the showing preferences for your listings:

1. Select **MY LISTINGS** from the Aligned Showings navigation menu.
2. Select the **Edit listing setup** icon for the listing.

   Note: You can only manage the showing properties for your listings, or listings where the LISTING agent has added you on as a team member.

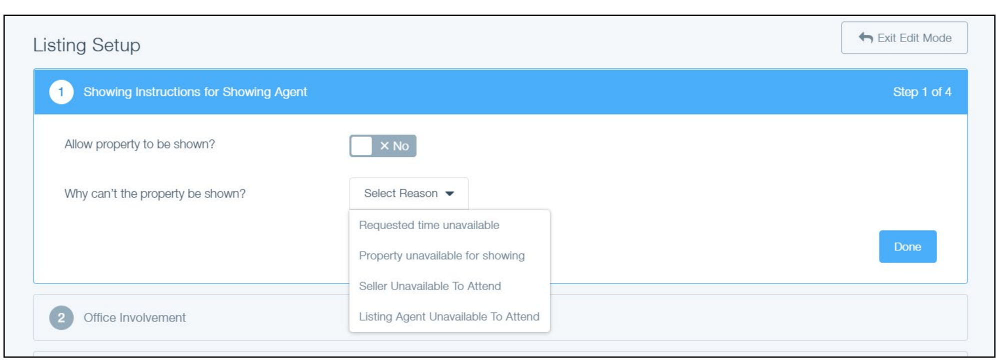
3. The listing details are displayed at the top of the screen and the Listing Setup

sections are displayed below. Click the **address** link to view the listing in your MLS.



4. You can modify the following showing details for a listing in the Listing Setup section:
   a. ***Allow property to be shown*** – Set to **Yes** if you want the listing available for showing requests in Aligned Showings. If you set it to **No**, you can select the reason the property can't be shown for your own information.

   Important! If you cannot edit this field, it reflects the showing choice you made in your MLS. To make changes, please edit your showing options directly in the MLS or check with your MLS.



b. ***Allow overlapping appointments*** - Set to **Yes** if you want to allow showing requests to overlap other appointments.

c. ***Maximum Overlap Limit*** - If you've enabled overlapping appointments, Select the maximum number of overlapping appointments. You can choose from 2 through 10 or no overlap limit.

d. ***Maximum Appointment Length*** - Select the maximum length of each showing. You can choose from None, 10, 15, 20, 30, 45, 60, 90, 120, or 180 minutes.

e. ***How are requests handled*** - Set whether showing requests receive **Instant Approval** or **Require Approval**. If this is set to Instant Approval, showing requests are automatically approved if the time slot is available. If this is set to Require Approval, showing requests will be in a Requested status until approved. Showing requests can be approved by the listing agent, by a listing team member (see ***Office Involvement*** for more information), or by a seller/tenant the listing agent has designated as an approver (see ***Seller/Tenant Involvement*** for more information).

f. ***Instant Message to Agent*** - Enter a courtesy message to send to the agent requesting a showing. The message is sent before the showing is approved. This option to send an instant message is only available if the showing requests require approval.

Important: Refrain from entering lockbox codes or any other information that should not be viewable in the instant message before the showing is approved.

g. ***Lockbox Access*** - Select **None**, **Combo**, or **Electronic** lockbox access.

- If you select **Combo**, you can enter the lockbox combination combo code. The code is not viewable by the showing agent until the showing is approved, unless the listing is set to approve showing requests instantly.
- If you select **Electronic**, you can choose **Other**, **HUD Key**, **Master Lock**, **SentriLock** or **Supra** for the lockbox brand.

h. ***Showing Arrangement*** - Select whether the listing agent and seller will attend the showing.

i. ***Request Callback*** - Select this box to request that all showing agents call the listing agent. Once the showing is approved, a note is automatically added to the showing conversation to call the listing agent and it includes the listing agent phone number on file.

j. ***Buyer Name Required*** - Enable to require a buyer name be added to the showing appointment request. Note this option is only available if selected as an option by your MLS.

k. ***Additional Instructions*** - Enter additional instructions for showing agents. This is usually information pertinent to the listing such as the lockbox location. Additional Instructions are viewable in the showing MESSAGE once an appointment has been approved.

l. ***Advance Notice Duration*** - Select the amount of advanced notice required for a showing appointment. Check **Disable same day request** if you do not want to allow showing appointment requests the same day of the showing.

m. Select **Done** to save your settings.

Tip! The information in the lockbox access, showing arrangement, request callback, and additional instructions fields will be the default settings when you approve a showing and can be changed for each showing appointment.

Note: Anytime before the showing occurs you can change the type of lockbox, the combination code, select the showing arrangement, request a call for details, and change the additional instructions.

Office Involvement

Office Involvement is a powerful feature that allows a listing agent to add team members to their listings. This allows flexibility for many of the ways real estate professionals work with co-listing agents, assistants, and showing coordinators in scheduling and managing showing appointments.

Important! Listing agents can add anyone in their office, but can't add someone from another office.

Team members added to a listing can:

- Set the listing showing preferences
- View showing appointments in their Aligned Showings Calendar
- Add approved showings appointments to their Google or Outlook calendar
- View, approve, decline, or reschedule showing requests
- View showing appointment conversations in Messages
- Send messages to listing and showing teams
- Send team notes
- Add additional team members to the listing
- Add additional team members to showing appointments in Messages
- Edit showing access details
- Edit team instructions for a showing appointment
- View the seller/tenant contact information and the seller/tenant's showing appointment link
- View showing appointment contact information
- View showing appointment history

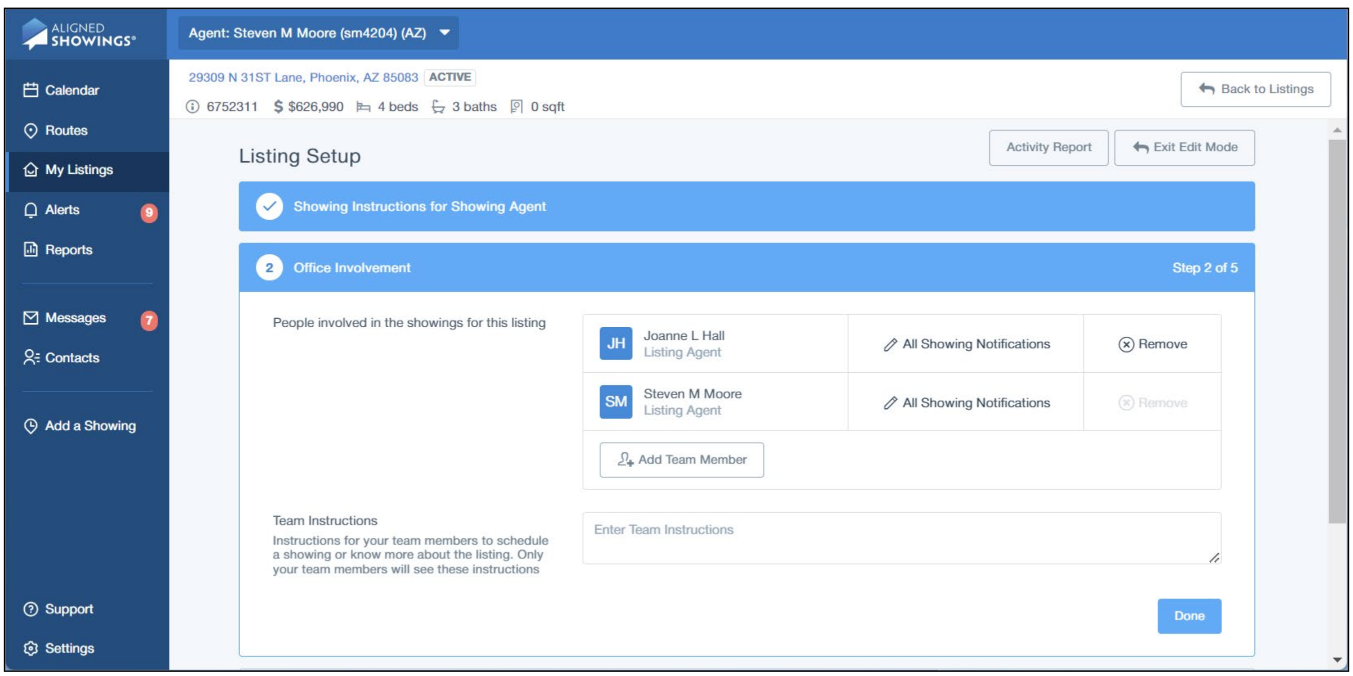
In the Office Involvement section, you can specify which notifications are sent to yourself and any team member. You can choose from **All Showing Notifications**, **Approvals and Cancellations Only**, or **No Showing Notifications**. The following notifications are sent to listing team members for the each of the selectable options:

NOTIFICATION	ALL SHOWING NOTIFICATIONS	APPROVALS AND CANCELLATIONS ONLY	NO SHOWING NOTIFICATIONS
A showing appointment is requested, included repeats if no response	yes	no	no
A showing is approved - instant approval	yes	yes	no
A showing is approved - approval required	yes	yes	no

NOTIFICATION	ALL SHOWING NOTIFICATIONS	APPROVALS AND CANCELLATIONS ONLY	NO SHOWING NOTIFICATIONS
A showing appointment is rescheduled and preapproved by the listing agent	yes	yes	no
A showing requested is declined	yes	no	no
A showing request is canceled	yes	yes	no
Showing feedback is received	yes	no	no
New message in a showing conversation	yes	no	no
Team note sent on a showing conversation	yes	no	no
Seller/Tenant unsubscribes from receiving showing requests	yes	no	no

To manage team members for your listings:

1. Select **MY LISTINGS** from the Aligned Showings navigation menu.
2. Select the **Edit listing setup** icon for the listing.
3. Select the **Office Involvement** section.



4. Select **Add Team Member**.
5. Type in the name of the person in your office to add.
6. Select their name.
7. Select the notification preferences for the team member. You can choose that they receive **All Showing Notifications**, **Approvals and Cancellations Only**, or **No Showing Notifications**.

8. Select whether you would like to **Include calendar event** in the email notifications sent to the team member.
9. Select **Save Team Member**.
10. A team member can be removed by selecting **Remove** on the line on this screen. This removes them from access to any showing requests that haven't occurred yet.
11. Enter any team instructions about the listing.
12. Select **Done** to save your settings.

Tips!

- The listing agent can also change their notification preferences and whether they want to receive the calendar event in Office Involvement.
- Team members added to listings do not have access to showing appointments that occurred before they were added to the listing in Office Involvement.
- When a team member is removed from a listing in Office Involvement, they retain access to showing requests added while they were a listing team member and can interact with the showings in CALENDAR and MESSAGES, but they will not have access to any showing requests that haven't occurred yet.
- You can add or remove a listing team member to a particular showing appointment rather than to a listing. See ***Messages*** for more information.
- Showing agents can add showing team members to an appointment in MESSAGES. See ***Messages*** for more information.

Seller/Tenant Involvement

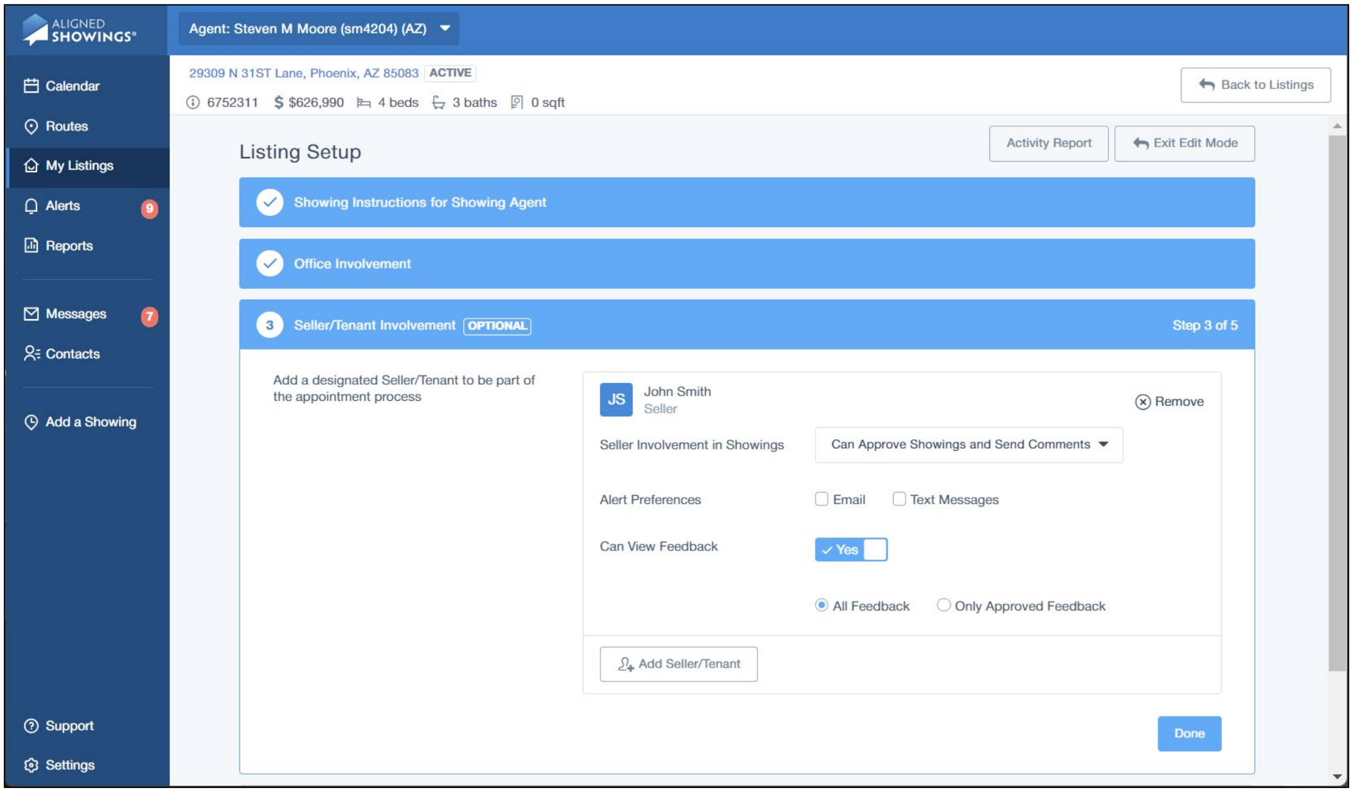
Seller/Tenant Involvement allows the LISTING AGENT to designate someone outside the MLS system to be involved in the showing appointment approval process.

Seller/Tenants receive showing appointment notifications by email and/or text message (SMS). They can be set up to approve/decline showing appointment requests, view showing requests, or have no involvement at all.

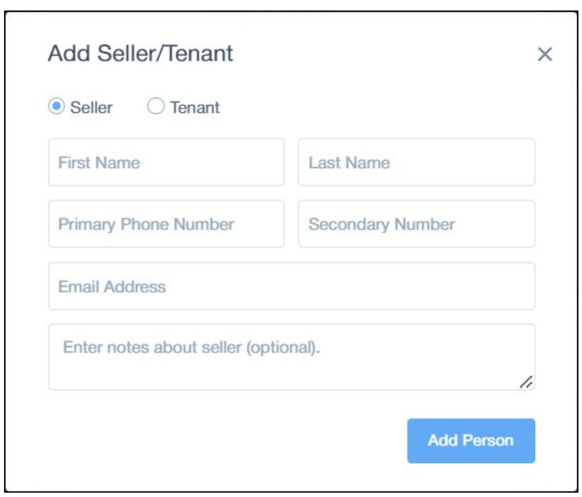
To manage the seller/tenant involvement for your listings:

1. Select **MY LISTINGS** from the Aligned Showings navigation menu. Your active listings are displayed.
2. Select the **Edit listing setup** icon for the listing.

3. Select the **Seller/Tenant Involvement** section.



4. Select **Add Seller/Tenant**.
5. Enter the name of the seller or tenant, then click **Invite New User**.
6. The Add Seller/Tenant screen is displayed.



7. Select **Seller** or **Tenant**.
8. Enter the first name, last name, primary phone number, secondary number if available, and email address.
9. Select **Add Person**.
10. Select the level of involvement for the seller/tenant.
    - Select **Can Approve Showings and Send Comments** if you want them to have the ability to approve or decline showings, and be able to include additional

comments or instructions.

- Select **Can Approve Showings with No Comments** if you want them to have the ability to approve or decline showings, but not include additional comments.
- Select **Notifications Only** if you want them to be able to view showing appointment requests but not approve or decline them.
- Select **NONE** if you added the seller/tenant for reference only and they will not be able to approve or decline showings.

11. If the seller/tenant is set to approve showings or receive notifications, select if they should receive **Email** and **Text Message** alerts.
12. If you want the seller/tenant to be able to view feedback, enable **Can view feedback**, and then select **All Feedback** or **Only Approved Feedback**. See ***Showing Feedback*** for information on how to approve feedback for the seller/tenant to view when **Only Approved Feedback** is selected.
13. Select **Done** to save the seller/tenant settings.

Tips!

- Seller/Tenants view showings on a static web page outside of the Aligned Showings system to view or approve/decline showing requests. See ***Manage Showing Requests as a Listing Agent*** for more information.
- A showing request can be approved by either the listing agent, listing team member, or seller/tenant.
- After a showing request is approved by either the listing agent, listing team member, or seller/tenant, it can be declined by either the listing agent, listing team member, or seller/tenant.
- Seller/Tenants can view the following information: the address, date and time of the showing request, the duration of the showing, any optional message entered by the showing agent and any approved, pending, declined, and canceled appointments for the listing.
- Seller/Tenants names and contact information are only viewable by the listing agent and listing team members in MY LISTINGS and MESSAGES. Seller/Tenant information is not viewable by the showing agent side.
- View a list of the seller/tenants you have added to your listings by going to **Contacts** and selecting **My Sellers** tab.

Time/Date Restrictions

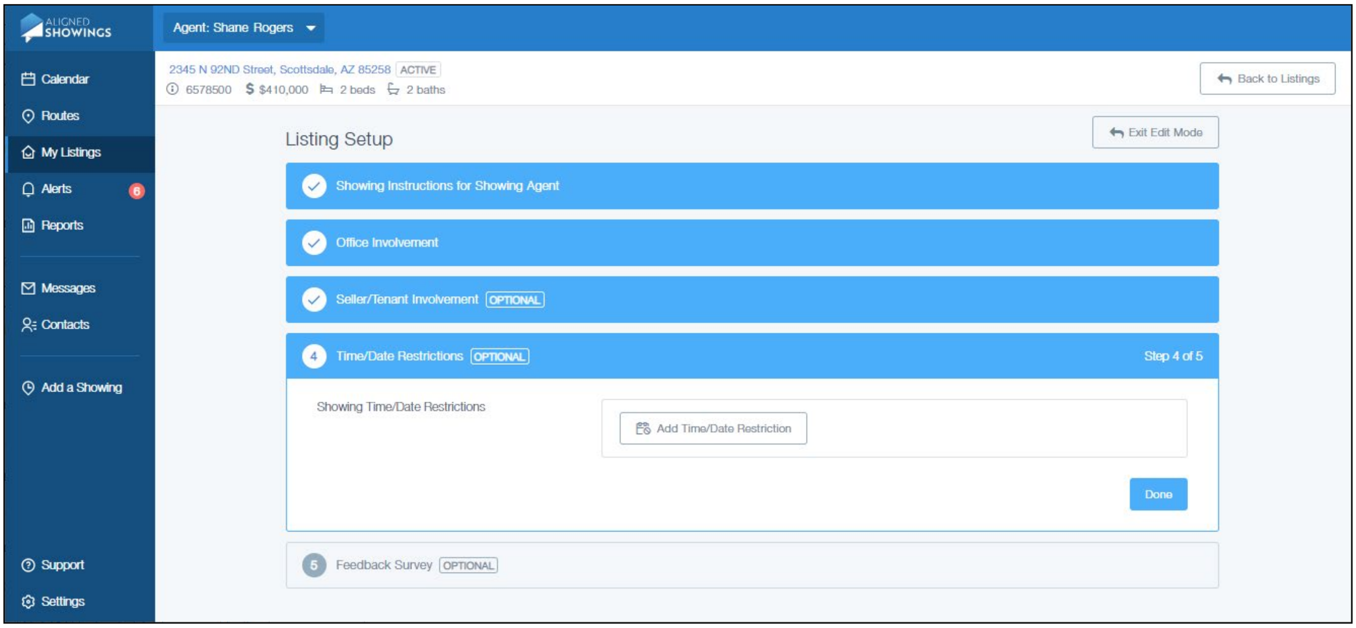
You can block showing request for particular dates and times for your listings.

Tip! Time and date restrictions for a listing can be set by the LISTING AGENT and team members added to listings. See ***Office Involvement*** for more information.

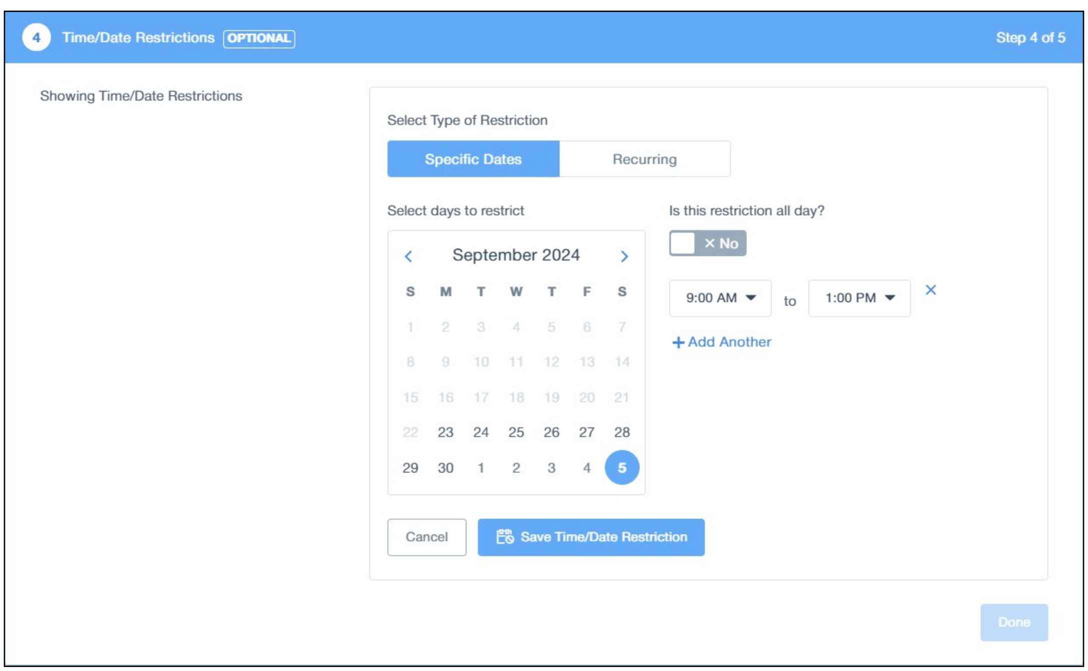
To manage the time/date restrictions for your listings:

1. Select **MY LISTINGS** from the Aligned Showings navigation menu. Your active listings are displayed.
2. Select the **Edit listing setup** icon for the listing.

3. Select the **Time/Date Restrictions** section.

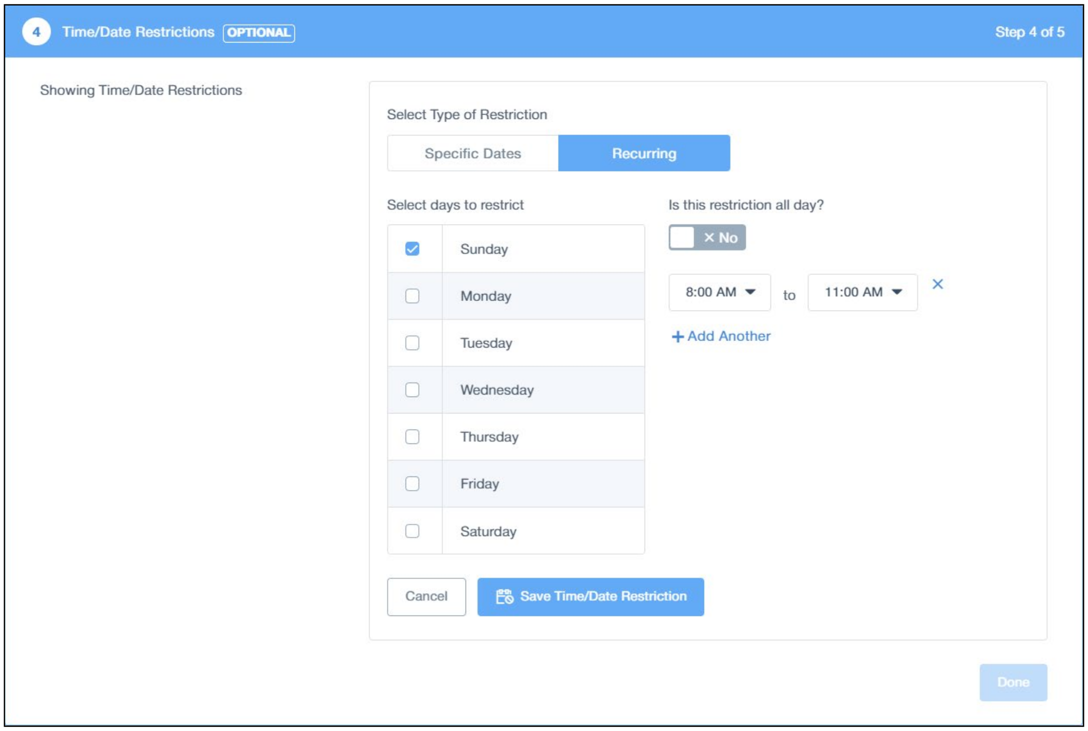


4. Select **Add Time/Date Restriction**. A calendar is displayed.
5. Choose the **Specific Dates** tab to restrict showings on a specific date or multiple dates.
6. Select the day of the month to restrict showings on that date. Multiple dates can be selected.
7. Select **Yes/No** to indicate if the restriction is all day.
8. If the restriction is not all day, select the time range showings should not occur. Select **+Add Another** to add multiple ranges of time in the dates selected.



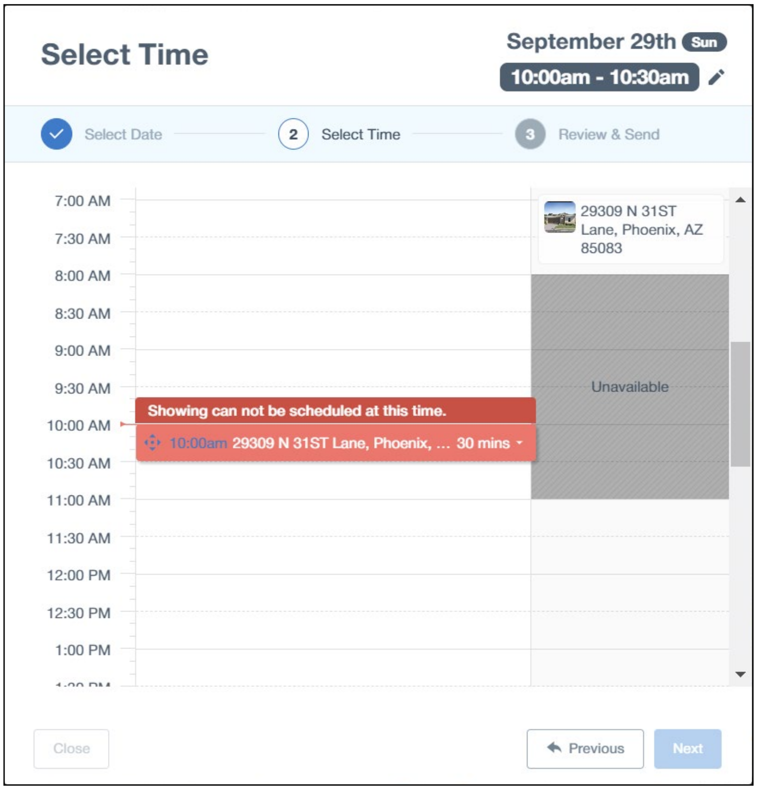
9. Select **Save Time/Date Restriction** when you have completed the selection.
10. Choose the **Recurring** tab to set restrictions for recurring times, such as every

Tuesday from 8:00 AM to 9:00 AM.



11. Select the days of the week to block showings.
12. **Yes/No** to indicate if the restriction is all day.
13. If the restriction is not all day, select the time range showings should not occur. Select **+Add Another** to add multiple ranges of time in the dates selected.
14. Select **Save Time/Date Restriction** when you have completed the selection.
15. Select **Done** to save your settings.

Important! Showing appointments can not be requested during blocked dates and times, however listing agents booking a showing on their own listing can override restricted times.



Tips!

- Blocking showing appointments could be useful for occasions such as an open house, scheduled maintenance, house cleaning, or an animal care appointment.
- You can set default time/date restrictions that will automatically be applied to your new listings. See ***System Settings*** for more information.
- Aligned Showings will not block any showing requests unless a time/date restriction is set up, the listing requires advance notice, or the requested time already has a booked appointment when overlapping appointments are turned off.
- You can override a time/date restriction when scheduling a showing for your own listing.
- Time and date restrictions for a listing can be set by the LISTING AGENT and team members added to listings. See ***Office Involvement*** for more information.

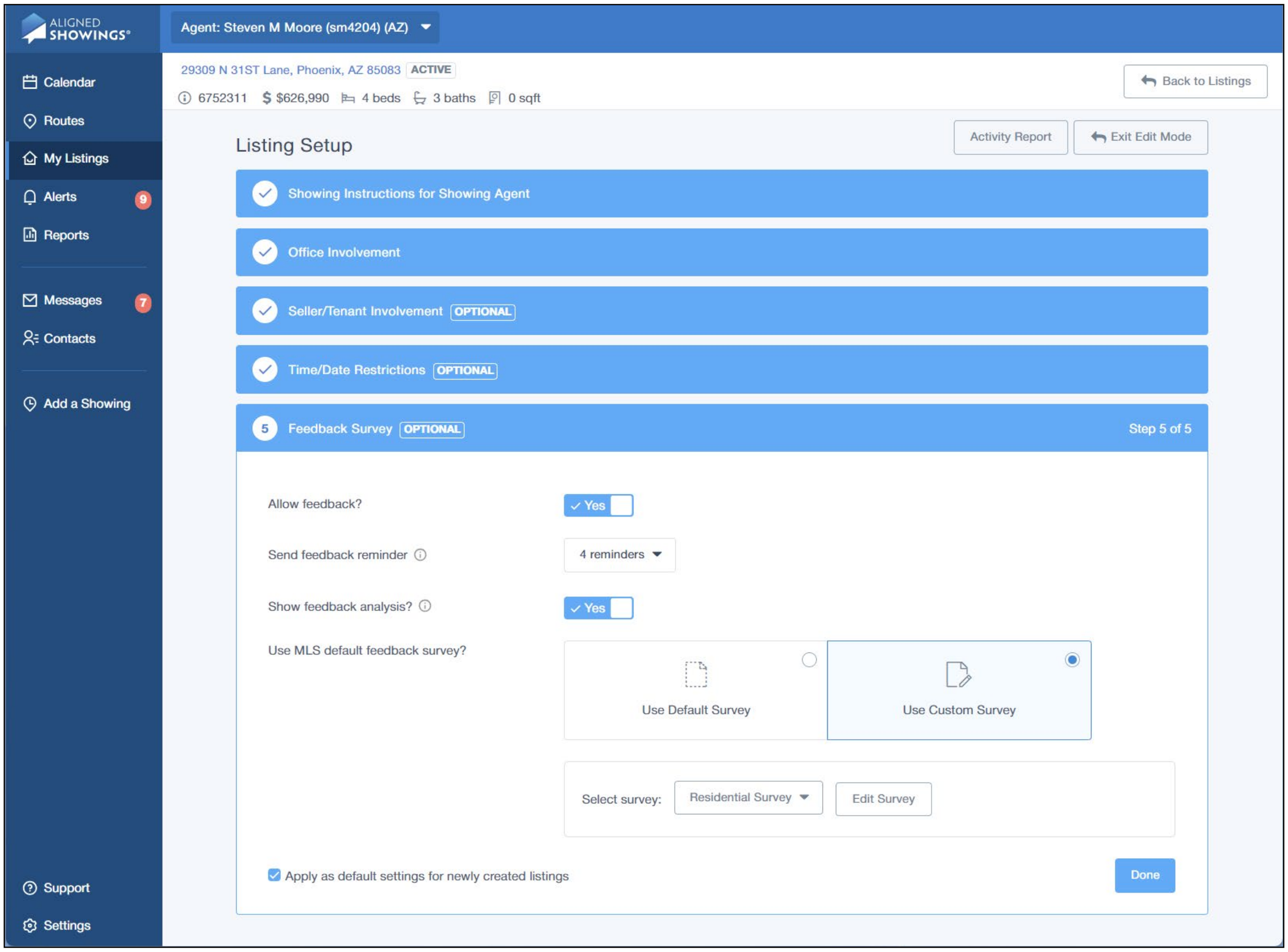
Feedback Survey

You can set your listings to automatically send a feedback survey after a showing. You can use the default feedback survey or set your own custom survey questions. See ***Feedback Survey Settings*** for information on setting up custom surveys.

To manage the feedback survey for your listings:

1. Select **MY LISTINGS** from the Aligned Showings navigation menu.
2. Select the **Edit listing setup** icon for the listing.

3. Select the **Feedback Survey** section.



4. Enable **Allow feedback** if you would like a feedback request automatically sent to the showing agent after a showing for new listings. Turn this off if you do not want to have Aligned Showings automatically ask for feedback after a showing.
5. Select the **Request feedback reminder** dropdown to set the number of feedback reminders to go out. You can select between 2 and 6 reminders to be sent out after an appointment. Once the feedback survey is completed, the reminders are no longer sent out.
6. Enable **Show feedback analysis** to include a system generated positive or negative indicator for each response.
7. Select **Use Default Survey** to use the default survey for new listings.
8. Select **Use Custom Survey** to use a custom survey for new listings, and then select the survey from the dropdown.
9. Select **Save**.

Tip!

- You can create a custom survey for each type of listing you have such as vacant or residential.

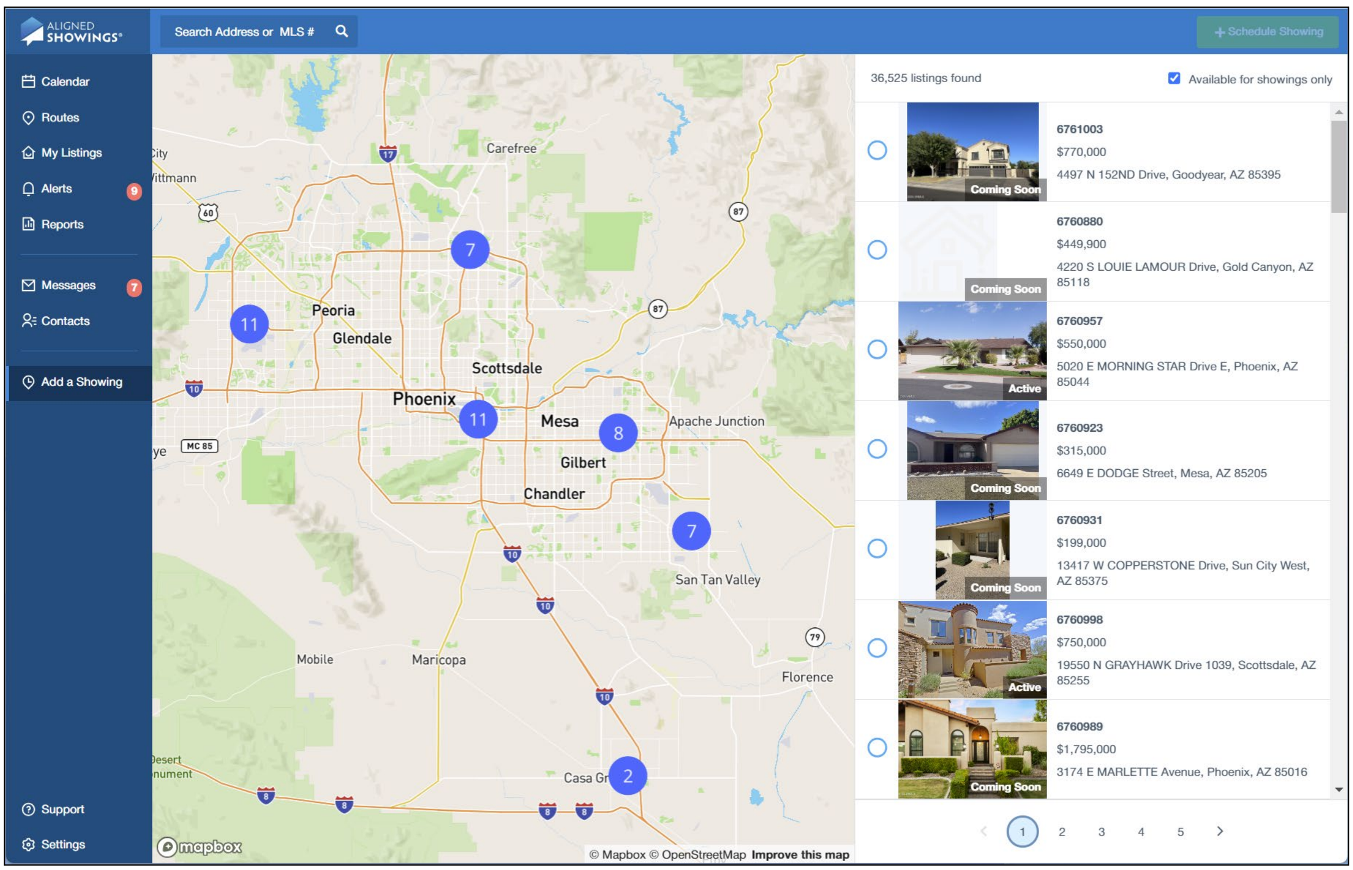
Schedule and Manage Showings

Aligned Showings makes it easy for showing agents to create a showing appointment and for listing agents or designated people to approve or decline appointments. Automatic feedback requests can be sent to showing agents to request feedback after a showing.

Create a Showing Appointment

To create a showing:

1. Select **Add a Showing** from the Aligned Showings navigation menu.
2. A map and list of 50 randomly selected active listings are displayed.



3. Search for the listing:
   a. Enter the address, MLS#, or listing agent name in the search bar at the top to find a listing and press **Enter** or select the search icon.

      Tip! You can enter a partial address including the street number, name, city, or zip code.

      Note: Only listings set to **Allow property to be shown** are displayed. See *Manage Showing Instructions for Your Listings* for more information. Uncheck **Available for showings only** in the upper right to view all listings matching the criteria, including those unavailable to show.

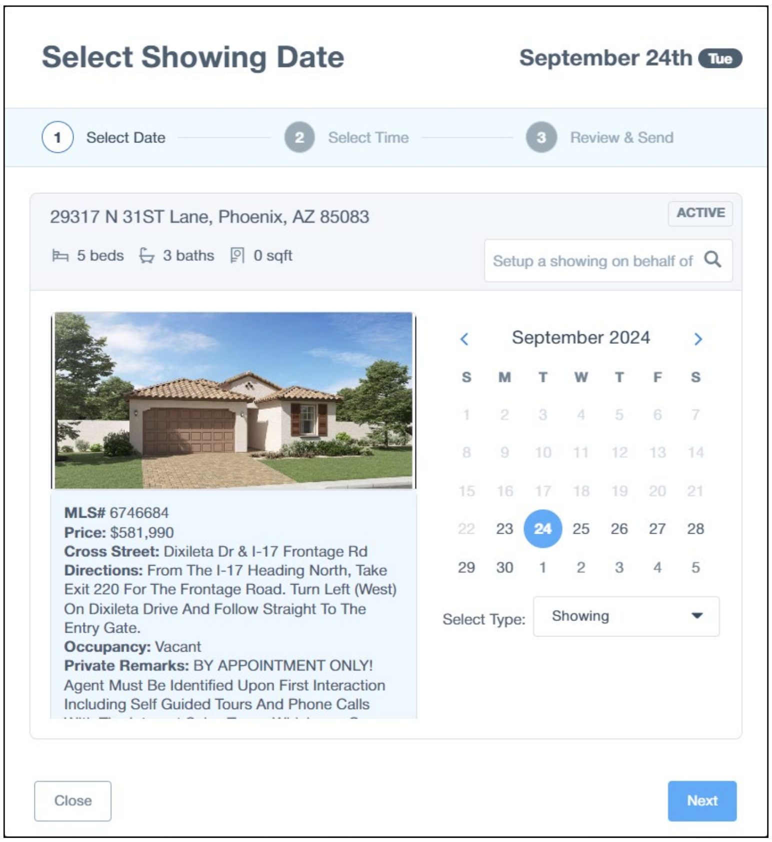
   b. Select the arrow or page number at the bottom of the list view to see additional listings that meet your search criteria.

   c. Navigate the map using your touchpad, keypad, mouse, or touchscreen monitor:
      - Use the mouse to zoom in by double clicking on an area of the map, or zoom in on an area of the map by clicking and holding shift while dragging the cursor, or use the scroll button to zoom in and out of the map. Click and drag the cursor to pan the map, and rotate the map by clicking and dragging the cursor while holding the right mouse button or the Ctrl key.
      - Use a touchscreen monitor to zoom and rotate the map by pinching or dragging on the touchscreen. Zoom with one finger by double tapping and dragging and on the second tap, hold your finger down and drag up or down to zoom in or out.
      - Use the keyboard controls - and + to zoom in and the arrow keys to pan the map. Press the shift and arrow keys to rotate and change the pitch of the map.

4. Select the listing.

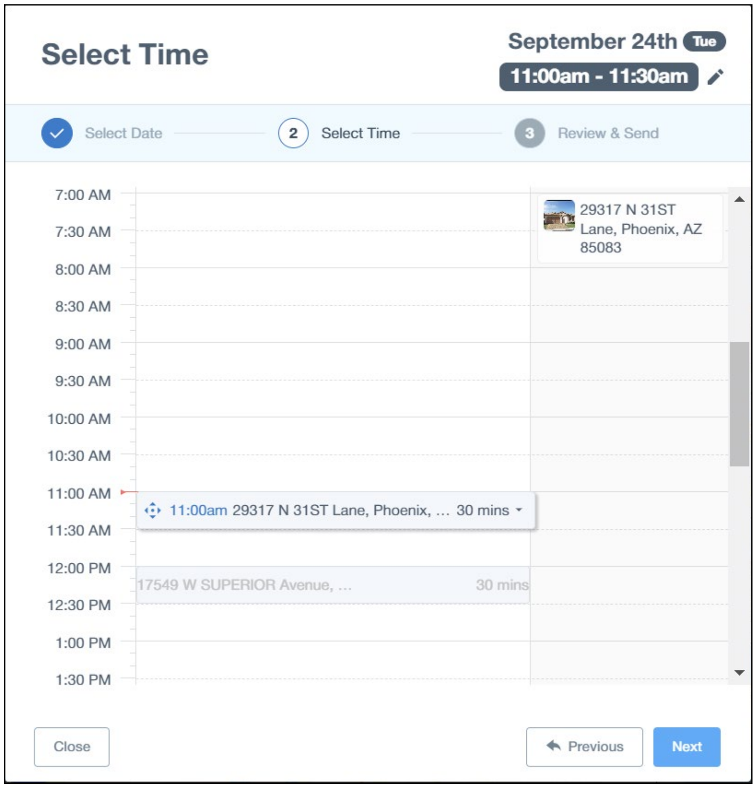
   Note: You can use the map to highlight the listing, then select the listing from the list.

5. Select the **Schedule Showing** button.

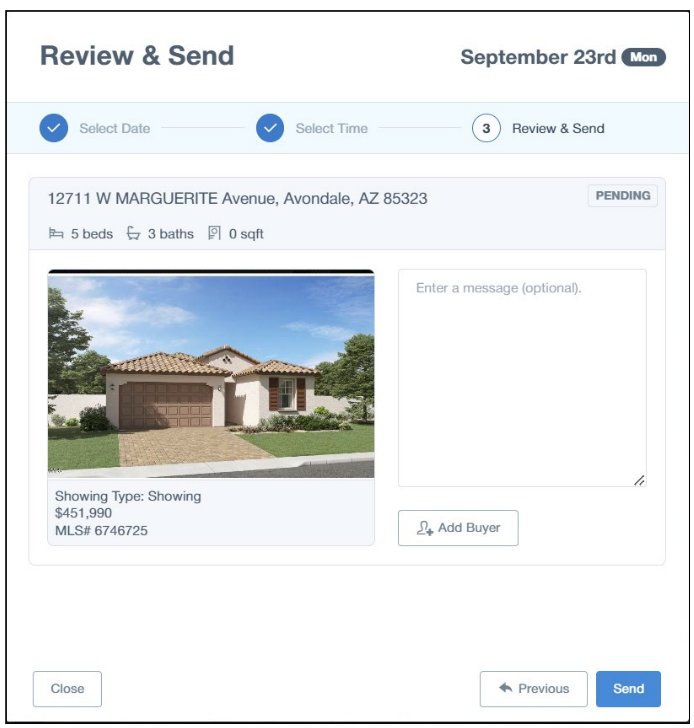


6. If you are a listing agent scheduling a showing of your own listings, you can schedule it on behalf of an agent. In the **Setup a showing on behalf of** field, enter the agent's name and select them from the list.
7. Select the date to schedule the showing and click **Next**.
8. Select the showing type: **Showing**, **Return Showing**, **Appraisal**, **Inspection**, and **Walk-Through**.
9. Select the desired showing time by dragging the appointment to the time or by

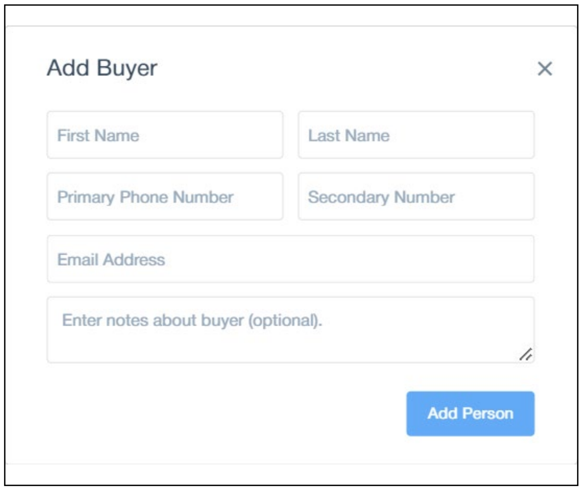
clicking the edit button next to the time in the upper right.



10. The showing duration defaults to 30 minutes. Change the duration of the showing by selecting the down arrow next to the showing. You can choose from 10, 15, 20, 30, 45, 60, 90 minutes, 2 hours, or 3 hours for a showing or return showing, as long as the length is less than the maximum length allowed by the listing agent. For an appraisal or inspection, you can also choose, 4, 5, or 6 hours for the duration.
11. Click **Next**.



12. Review the showing request. Select **Previous** to make changes.
13. Enter an optional message.
14. Select the **Add Buyer** button to enter the buyer for the showing. The Add Buyer screen displays.
    a. Enter the buyer name and select them from the list, or select **Create Buyer**.
    b. Enter the first name, last name, primary phone number, secondary number if available, and email address.



15. Select **Add Person**.
16. Select **Send**.

When a showing request is sent in Aligned Showings, the following occurs:

- The listing agent and any listing team members receive an ALERT, a new conversation is started in MESSAGES, and an appointment is created on their Aligned Showings CALENDAR. If they are set to receive showing notifications they will also receive an email and/or text notification.
- The showing agent receives an ALERT, a new conversation is started in MESSAGES, and an appointment is created on their Aligned Showings CALENDAR. The showing agent also receives an email and/or text message, depending on what they designated in SETTINGS.
- Any seller/tenant designated for the listing and set to receive an email or text message will receive a notification.
- Any buyer designated for the listing receives an email notification.
- When a listing agent schedules a showing on behalf of an agent, the MESSAGES screen is displayed to approve the listing.

The showing request status will shows as REQUESTED until it is APPROVED or DECLINED by the listing team, or until the showing agent CANCELS it or it EXPIRES.

Tip! The listing agent can override unavailable showing times when scheduling showing appointments on their own listings.

See ***Messages*** and ***Notifications*** for more information.

Manage Showing Requests as a Showing Agent

Once a showing request is added, the appointment details can be viewed by both the listing team and showing team.

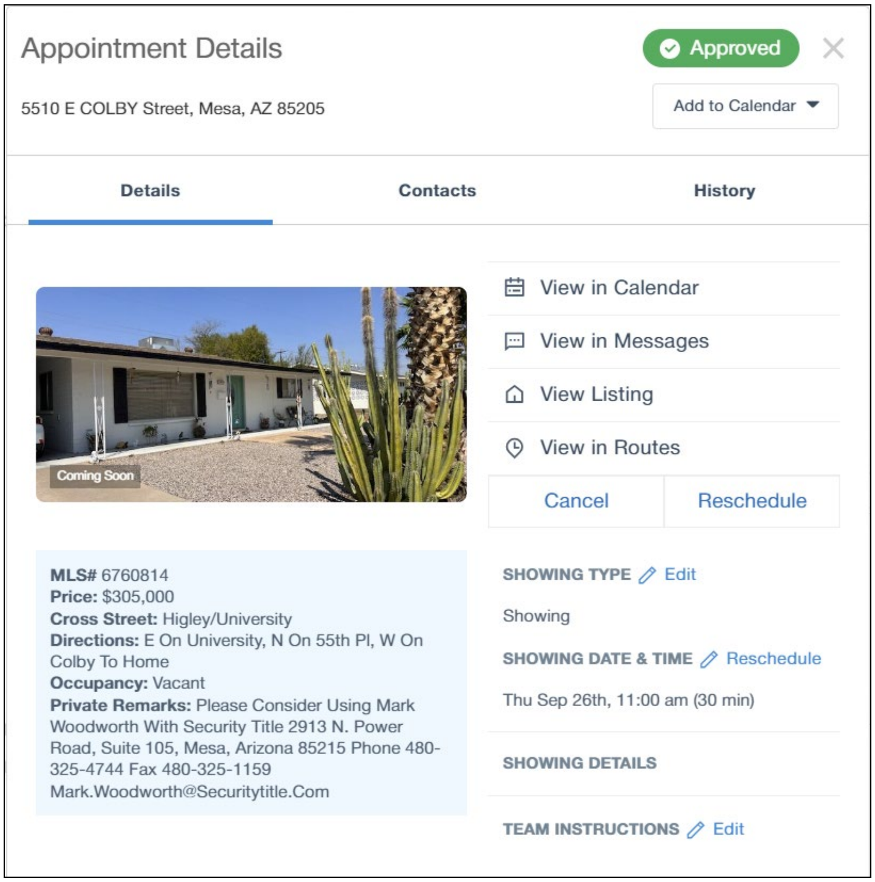
As the showing agent or showing team member you can:

- Add the appointment to your Google or Outlook Calendar once the showing request is approved
- View the showing in your Aligned Showings CALENDAR
- View the conversation about the showing in MESSAGES
- View the listing in the MLS
- View the showing in ROUTES if it is part of a route
- **Cancel** the showing appointment
- **Reschedule** the showing appointment
- Edit the showing type
- View the showing instructions
- Edit the team instructions
- View the appointment contacts on the **Contacts** tab
- View the appointment history on the **History** tab

To view, cancel, or reschedule a showing request as a showing agent:

1. Locate the showing on your Aligned Showings CALENDAR and select it.
2. Select **More Details**.

   Important! The Appointment Details screen will vary depending on whether you are the showing agent or the listing side and if the showing request has been approved.

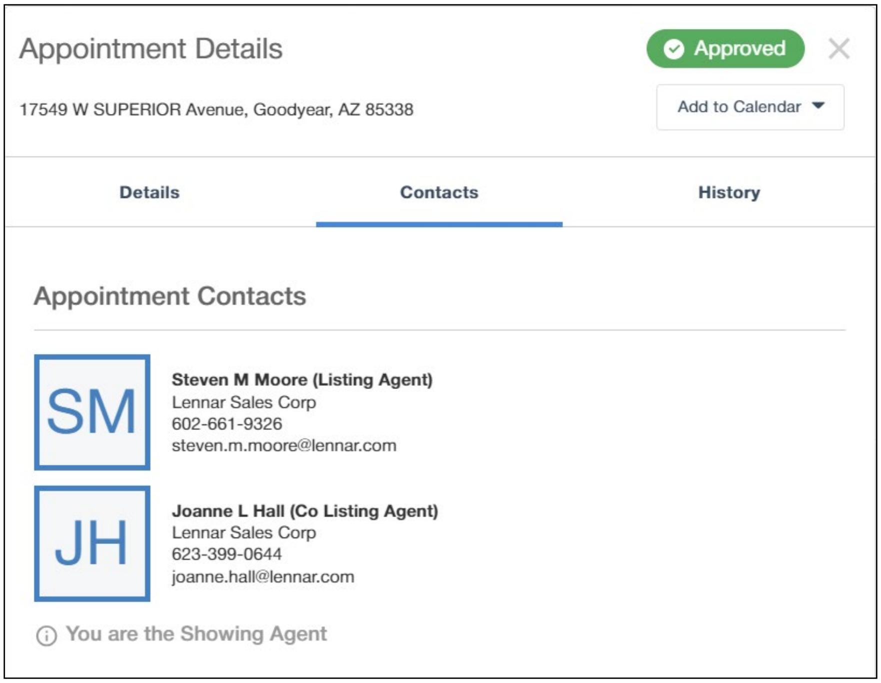


3. Select **Add to Calendar** to save the appointment to an external calendar. Note that this is only available after the showing request is approved.
4. Select **View in Calendar** to view the appointment in your Aligned Showings CALENDAR.
5. Select **View in Messages** to view the showing conversation in MESSAGES.
6. Select **View Listing** to view the listing in your MLS.
7. Select **View in Routes** if the showing is part of a route.
8. Select **Cancel** to cancel the showing request.
9. Select **Reschedule** to select a new date and/or time for the showing request. If the showing request has already been approved, it will be resent to the listing team for approval, unless the listing is set to instantly approve showings.
   a. Select the new showing date and then **Next**.
   b. Select the new showing time and then **Send**.

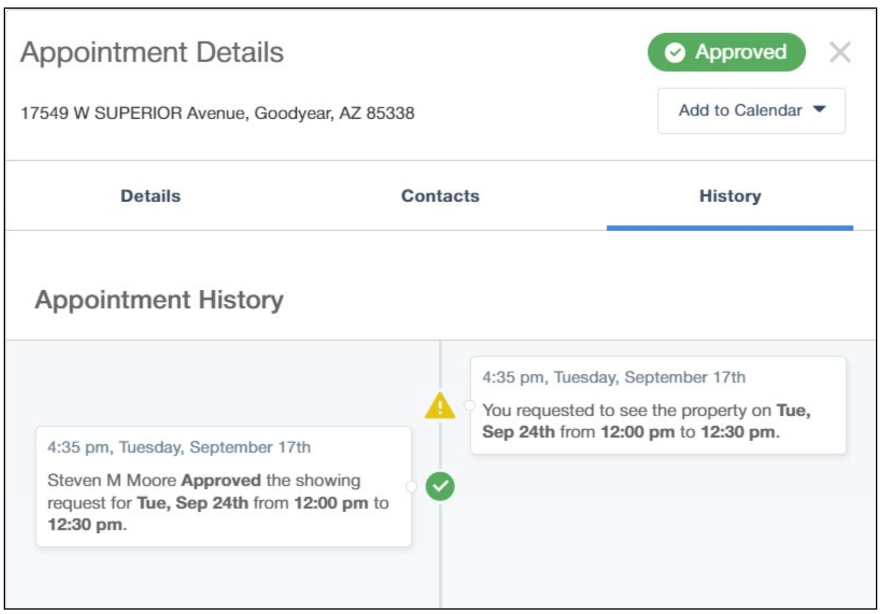
   Important! If the showing is part of a route, you can change the showing time and duration but not the showing date.
10. Select **Edit** next to Showing Type and select the type from the dropdown.
11. Select **Edit** next to Team Instructions to send a message to your team.

    Note: Information entered in the team instructions is only sent to your team, either the SHOWING or the LISTING team. See ***Office Involvement*** or ***Messages*** for information on adding team members.

12. Select the **Contacts** tab to view the appointment contacts.



13. Select the **History** tab to view the appointment history.



Any changes to showing requests are updated in both the Aligned Showings CALENDAR and MESSAGES for the listing team and showing team. If the showing request is canceled, the MESSAGE is updated, and the showing request remains in the Aligned Showings CALENDAR with a status of Cancelled.

Manage Showing Requests as a Listing Agent

As the listing agent or listing team member you can:

- Add the appointment to your Google or Outlook Calendar (.ICS) once the showing request is approved

- View the showing in your Aligned Showings CALENDAR
- View the conversation about the showing in MESSAGES
- View the listing in the MLS
- **Approve** or **Decline** the showing appointment
- **Reschedule** the showing appointment which allows you to suggest and preapprove a new showing time
- Edit the showing details once the showing request is approved
- Edit the team instructions
- View the appointment contacts on the **Contacts** tab
- View the appointment history on the **History** tab
- Change the showing status of a showing after a showing ends

Important! If the listing team or seller/tenant has declined the showing request, the date and time of the showing cannot be edited and the showing agent must add a new showing request.

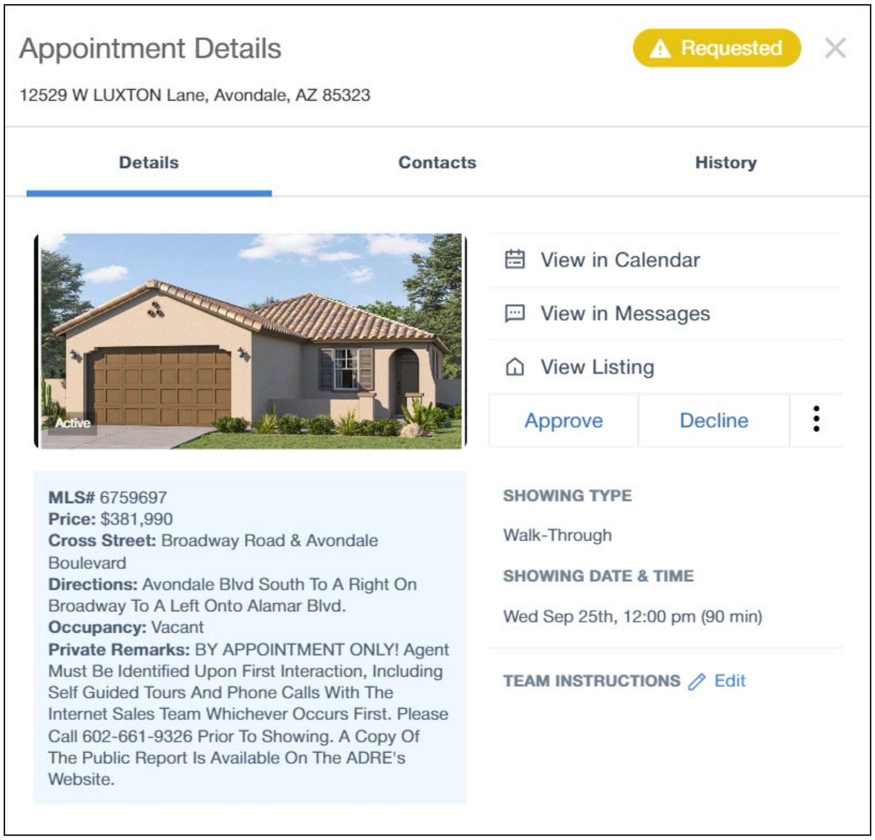
The following people can APPROVE or DECLINE a showing request in Aligned Showings:

- The listing agent
- Any team members the listing agent has designated in Office Involvement in the listing preferences
- Any seller/tenant designated by the listing team in Seller/Tenant Involvement in the listing preferences

To view, approve, decline, or reschedule a showing request as a listing agent or listing team member:

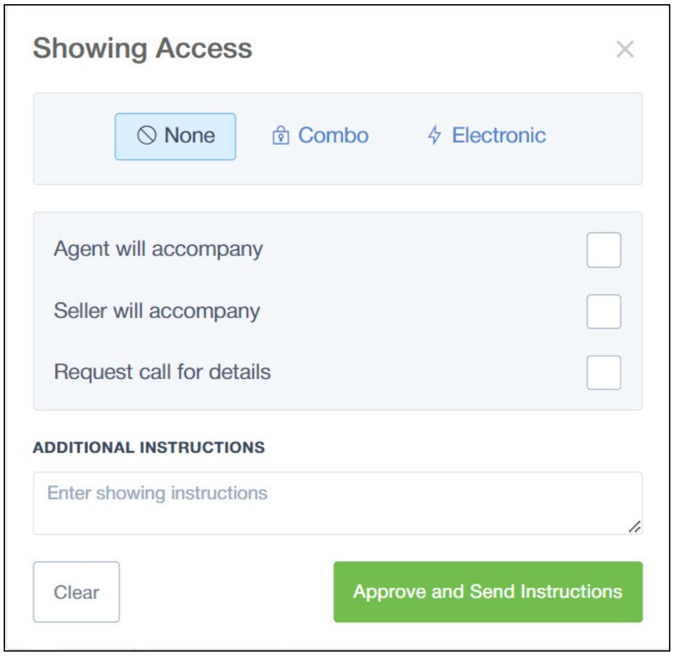
1. Locate the showing on your Aligned Showings CALENDAR and select it.
2. Select **More Details**.

   Important! The Appointment Details screen will vary depending on whether you are the showing agent or the listing side and if the showing request has been approved.

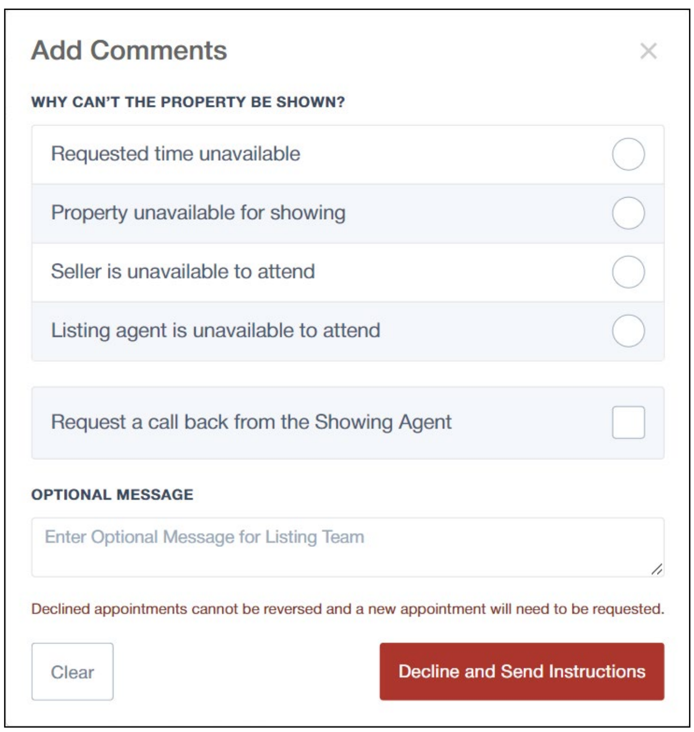


3. Select **Add to Calendar** to save the appointment to an external calendar. Note that this is only available after the showing request is approved.
4. Select **View in Calendar** to view the appointment in your Aligned Showings CALENDAR.
5. Select **View in Messages** to view the showing conversation in MESSAGES.
6. Select **View Listing** to view the listing in your MLS.
7. Select **Approve** to approve the showing.
    a. If you approve the showing request, the showing access information is displayed. You can change the type of lockbox, the combination code, select if the agent and seller will accompany, request a call for details, and enter any additional

showing instructions.

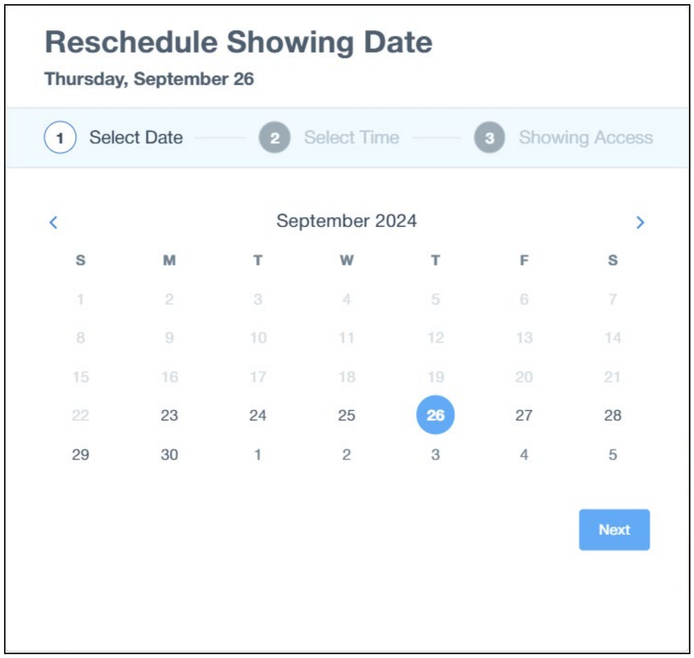


8. Select **Decline** to decline the showing.
   a. If you decline the showing request, you can select the reason the property can't be shown and add comments.

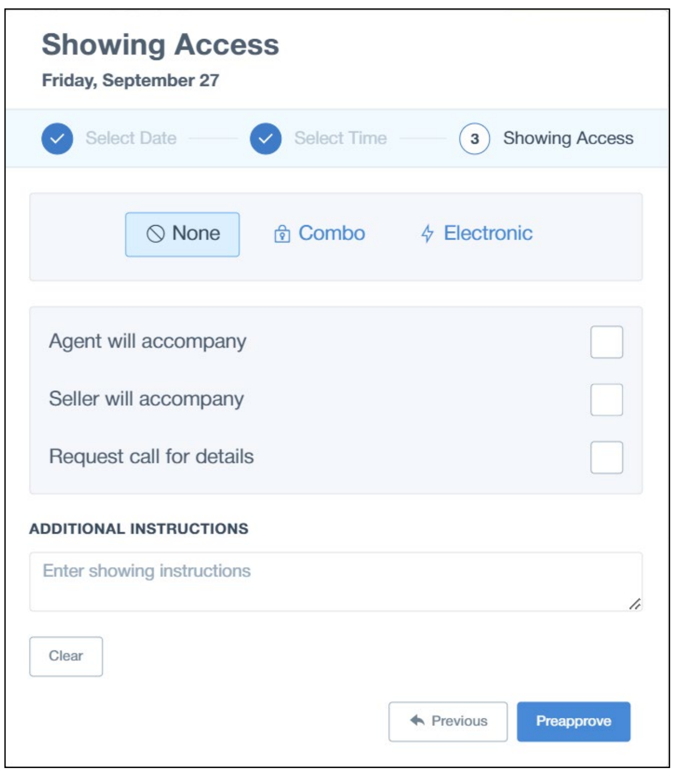


9. Select the 3 dots and select **Reschedule** to select a new date and time for the showing. This allows you to suggest a new date and time and preapprove the

showing.



a. Select the new showing date and then **Next**.
b. Select the new showing time and then **Next**.



c. Enter the showing instructions and select **Preapprove**.

10. Select **Edit** next to Showing Details to edit the showing details. Note that you can only do this if you are on the LISTING side and this only is available once the showing is approved.
11. Select **Edit** next to Team Instructions to send a message to your team.

Note: Information entered in the team instructions is only sent to your team, either the SHOWING or the LISTING team. See ***Office Involvement*** or ***Messages*** for information on adding team members.

12. Select the **Contacts** tab to view the appointment contacts.
13. Select the **History** tab to view the appointment history.

When a showing request is approved or declined, the following occurs:

- The listing team members receive an ALERT, any seller/tenants receive an email or text, the conversation is updated in MESSAGES, and the appointment in the Aligned Showings CALENDAR is changed to APPROVED or DECLINED. The listing team members also receive an email or text message, depending on what type of notification they have designated SETTINGS.
- The showing team members receive an ALERT, the conversation is updated in MESSAGES, and the appointment in the Aligned Showings CALENDAR is changed to APPROVED or DECLINED. The showing team members also receive an email or text message, depending on what type of notification they have designated in SETTINGS.
- A listing agent can change the status of an appointment after it has ended. This is useful if an appointment changes at the last minute and isn't updated in Aligned Showings.

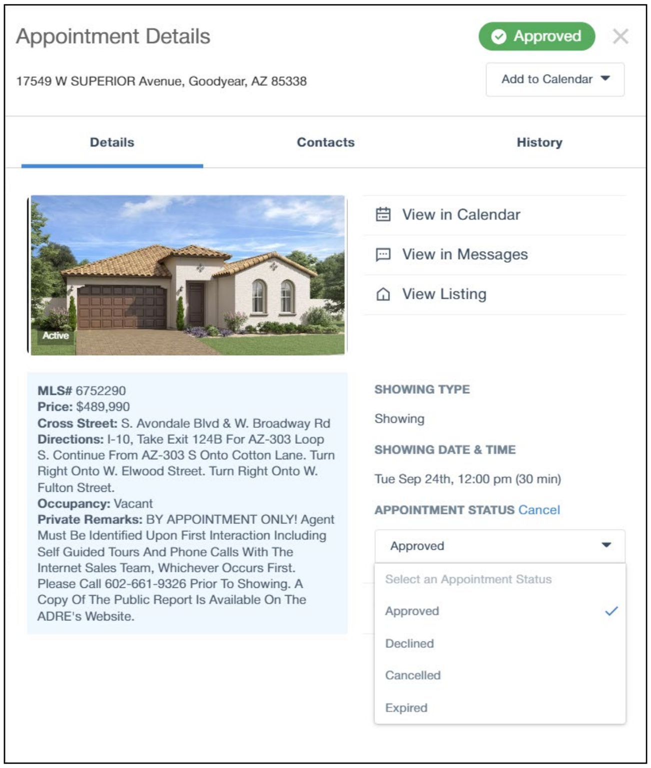
Tips:

- Once a showing request has been approved, it can be declined by the listing agent, a listing team member, or seller/tenant.
- If a listing is set for instant approval, showing requests are automatically approved as long as the time slot is available.
- If a listing is set for instant approval, approved showing requests can be changed by the SHOWING team without another approval.
- When a showing request has been declined, a new showing request must be added.
- If the showing team changes the time of a showing after it is approved, the showing status changes from approved to requested and a new showing request is issued.

To change the showing status of an appointment after the showing has ended:

1. Select **Calendar** from the Aligned Showings navigation menu.

2. Select the appointment and select **More Details**.



3. Select **Edit** on Appointment Status and select the new showing status.
4. Select **Save**.

Showing Feedback

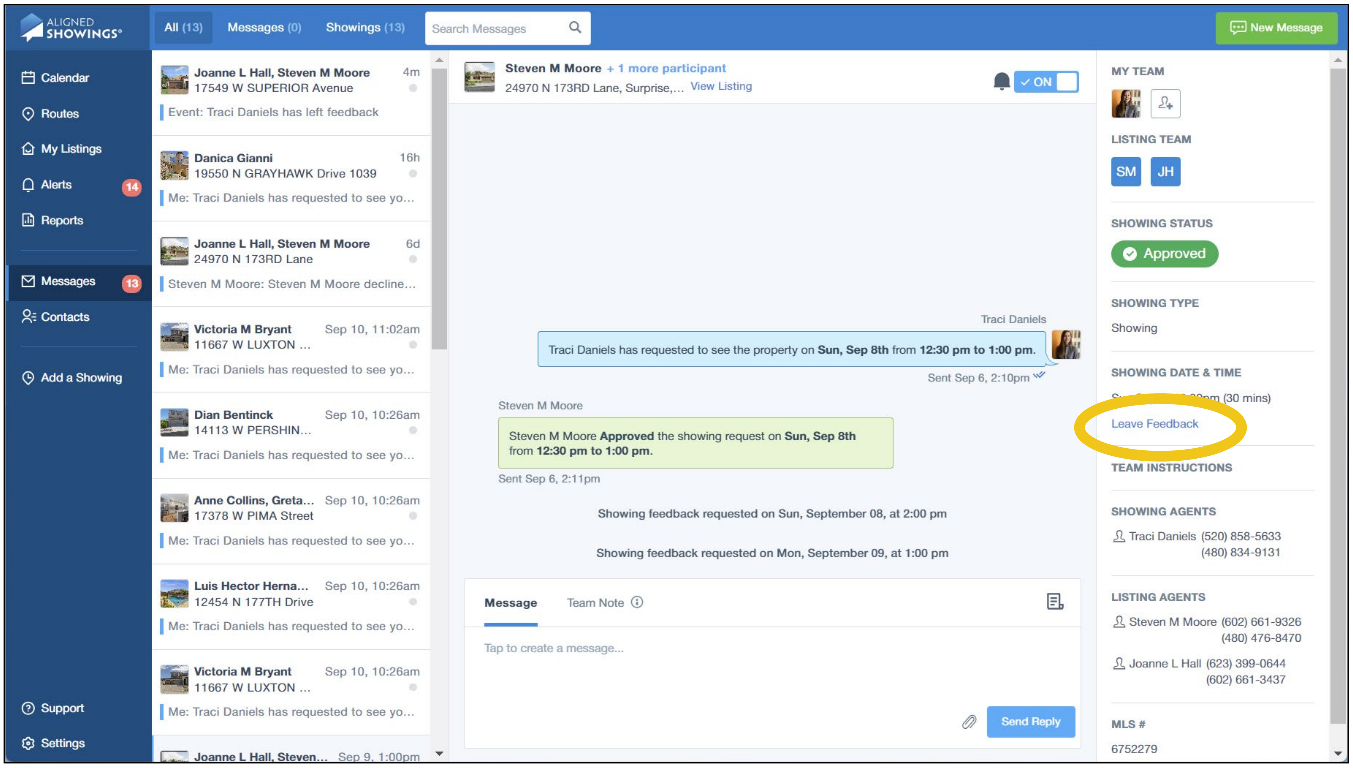
As a listing agent you can set up Aligned Showings to automatically request feedback from a showing agent after a showing occurs. You can use the default survey or you can set up custom feedback surveys. See *Feedback Survey Settings* for more information on how to set up custom feedback surveys and *Feedback Survey* to see how to assign a survey to a listing.

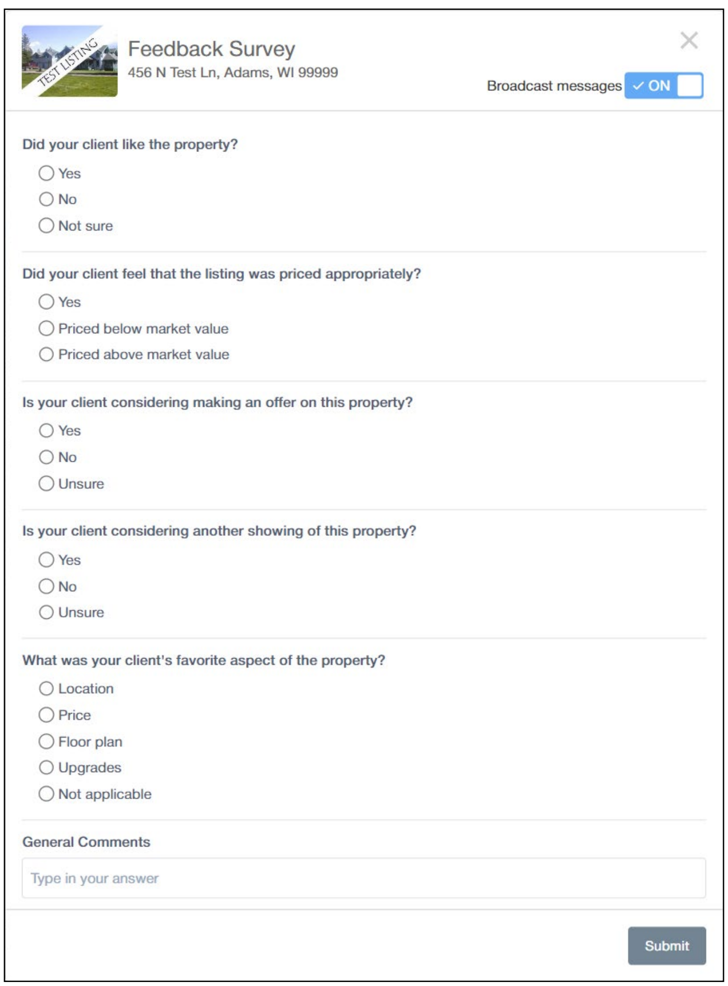
When a listing is set up to send feedback, one hour after a showing appointment has ended, a feedback request is sent to the showing agent and any showing team members. The request for feedback appears in ALERTS and in the showing conversation in MESSAGES. A feedback reminder is sent 24 hours after the showing, and if any additional reminders are set to go out, they will each follow another 24 hours later.

To leave feedback after a showing as a showing agent:

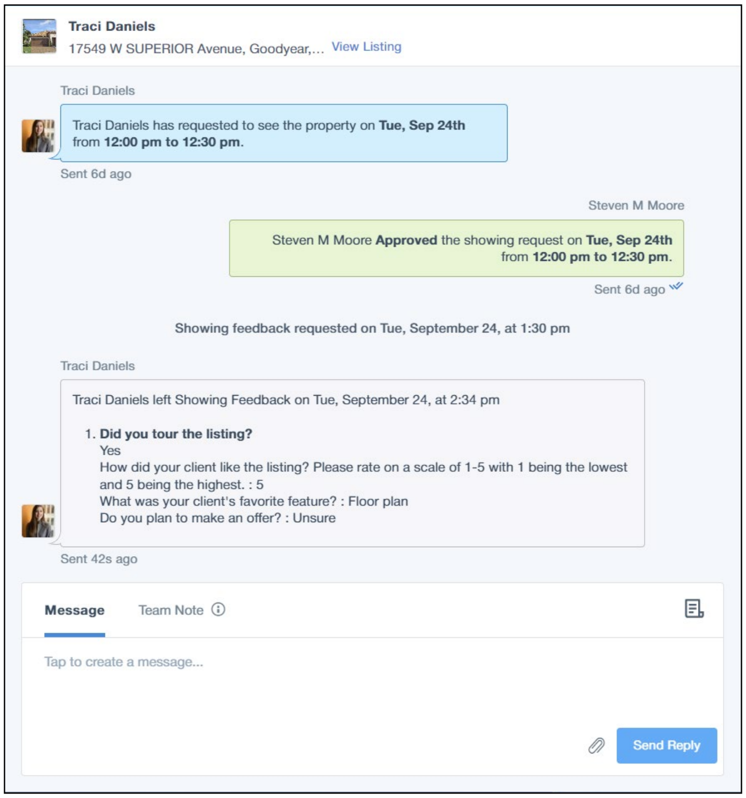
1. Select MESSAGES in the navigation bar.
2. Select the showing conversation.
3. If feedback has been requested since you viewed the showing conversation, the feedback survey is displayed. If the survey has been closed without being submitted, the showing agent or showing team member can return to the message and fill out

feedback later by selecting the **Leave Feedback** link.





4. Answer the feedback survey questions and select **Submit**.
5. The feedback is delivered to the showing agent in the MESSAGES showing thread.

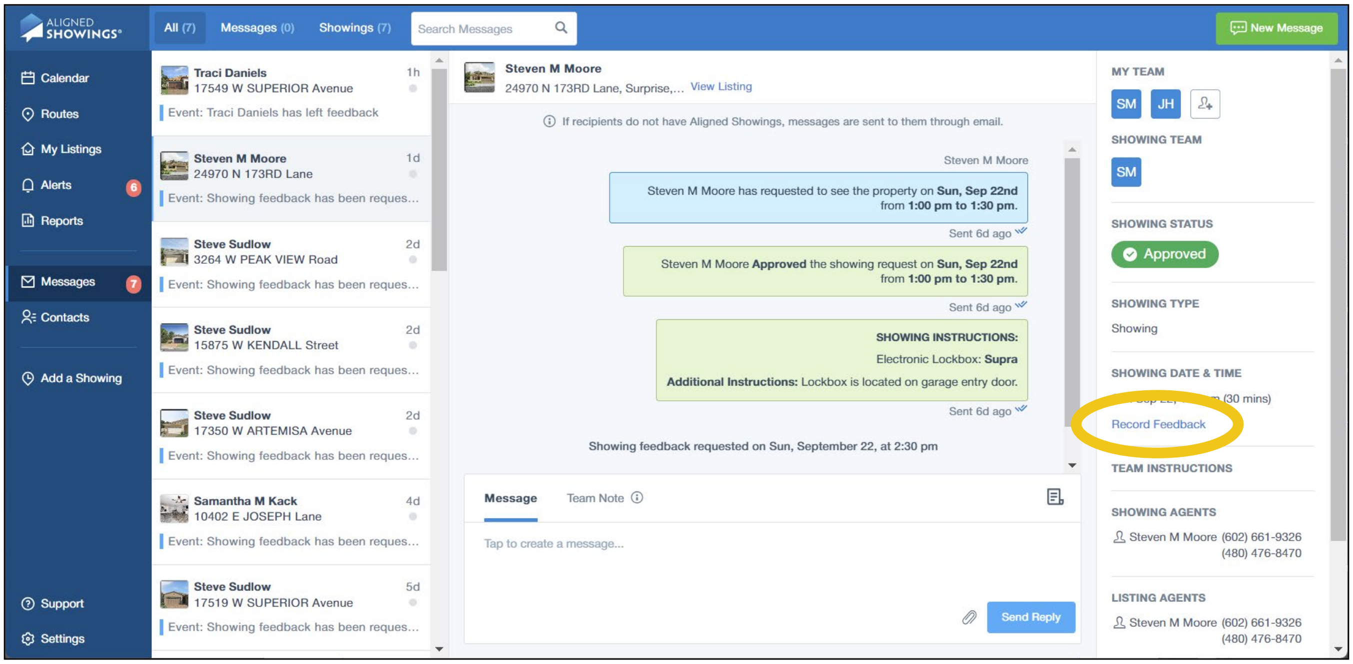


A listing agent can also fill out a showing feedback survey on behalf of a showing agent. This is useful when feedback is provided to the listing agent directly and the listing agent wants to add the feedback so it is available to the seller/tenant.

To record showing feedback received from a showing agent:

1. Select **Messages** from the Aligned Showings navigation bar.
2. Select the showing. Once feedback has been requested but not yet completed by

the showing agent, a **Record Feedback** link is available.



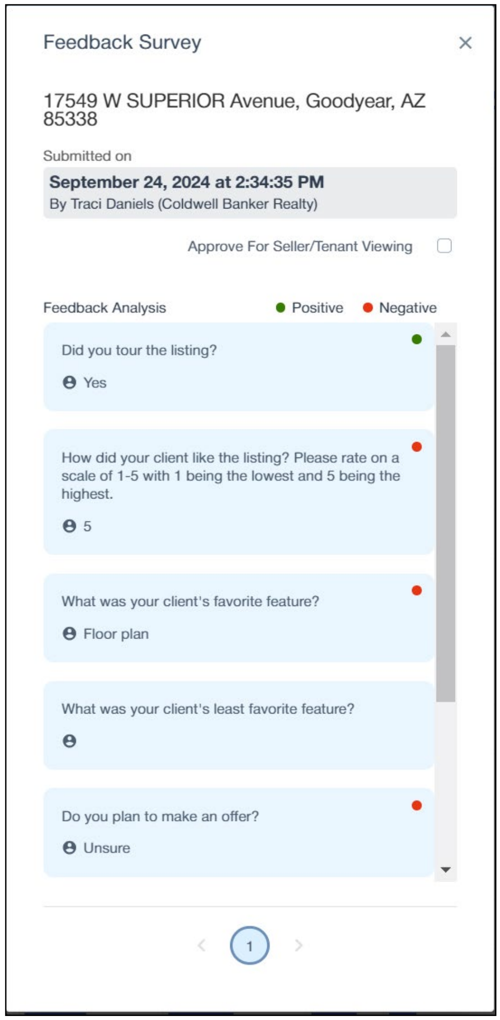
3. Select **Record Feedback** and complete the feedback survey.

When the listing agent or anyone on the listing team completes the survey, the feedback displays in Messages along with a note at the top who completed it on behalf of the showing agent.

To view showing feedback from your listing and approve feedback for your seller/tenant to view:

1. Select **MY LISTINGS** from the Aligned Showings navigation bar.

2. Select the **View Feedback** icon for the listing.



3. Select the **Approve For Seller/Tenant Viewing** checkbox if you have a seller/tenant set up to view only approved feedback and you want to make this feedback survey viewable.
4. Select the arrow buttons at the bottom to view additional feedback.

Tips!

- Feedback can also be included on the Activity Report. See ***Reports*** for more information.
- If the seller/tenant has view feedback enabled, they can view feedback by clicking the **View Feedback** button on their seller/tenant link.
- Feedback Analysis can be enabled or disabled. See ***Feedback Survey Settings*** for more information.

Routes

The ROUTES feature in Aligned Showings makes it easy to plan a day with multiple showings and send out all the showing requests at once.

There is no need to schedule each showing individually. ROUTES saves you time and helps you arrange your day while estimating the travel time to each appointment. You can choose the order of the showings or let the system determine the fastest route.

The process to create a route is simple. Select the listings, set the order of the appointments, then send all of the showing requests at once.

Note: If the Routes menu option is not available on your left navigation menu, your MLS has opted out of using this feature.

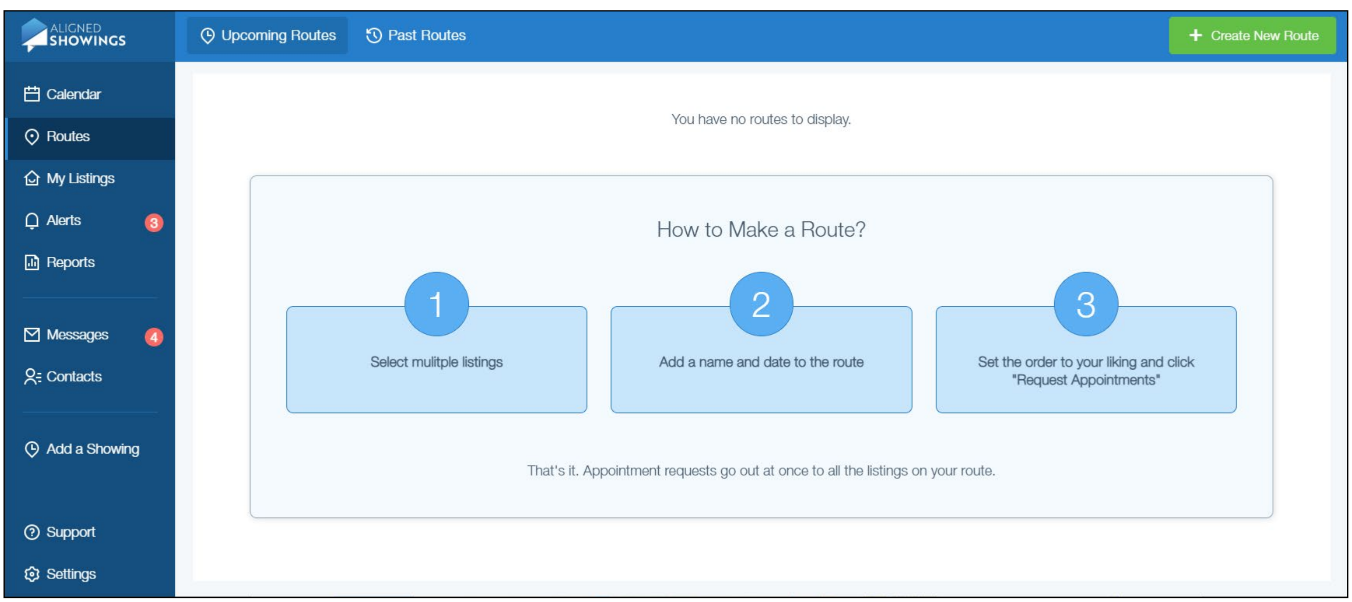
Tips!

- You can schedule a maximum of 12 showings per route.
- You can add a stop along the way, including a new appointment or a non-MLS stop.
- You can change the time of showings, add showings, or cancel showings even after a route is saved and showing requests are sent.
- If you change the time of a showing after it is approved, the showing status changes from approved to requested and a new showing request is issued.
- Once a route is scheduled, you can easily share the route details with your clients.

Create a Route

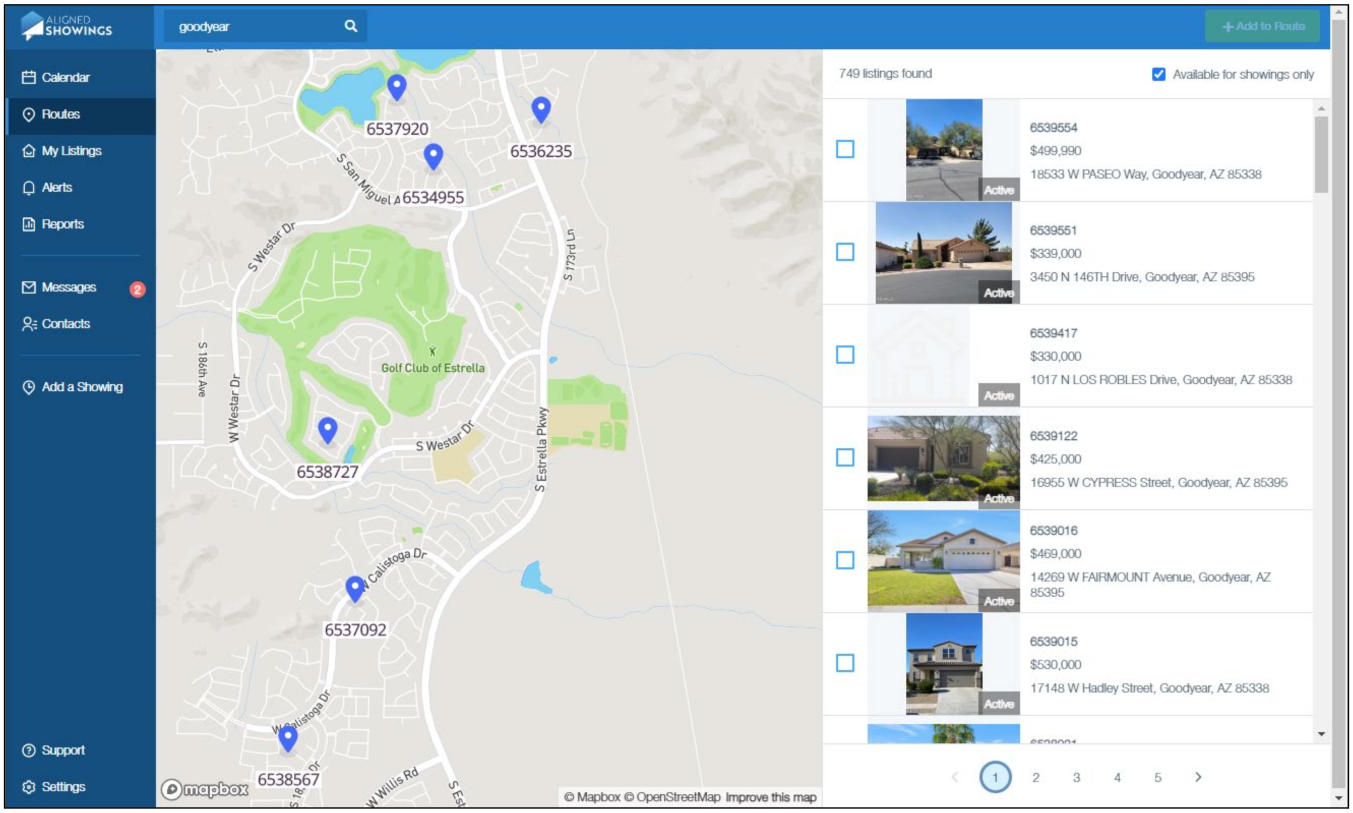
To create a route:

1. Select **ROUTES** from the Aligned Showings navigation menu.



2. Select the **Create New Route** button.

3. A map and list of 50 randomly selected active listings are displayed.

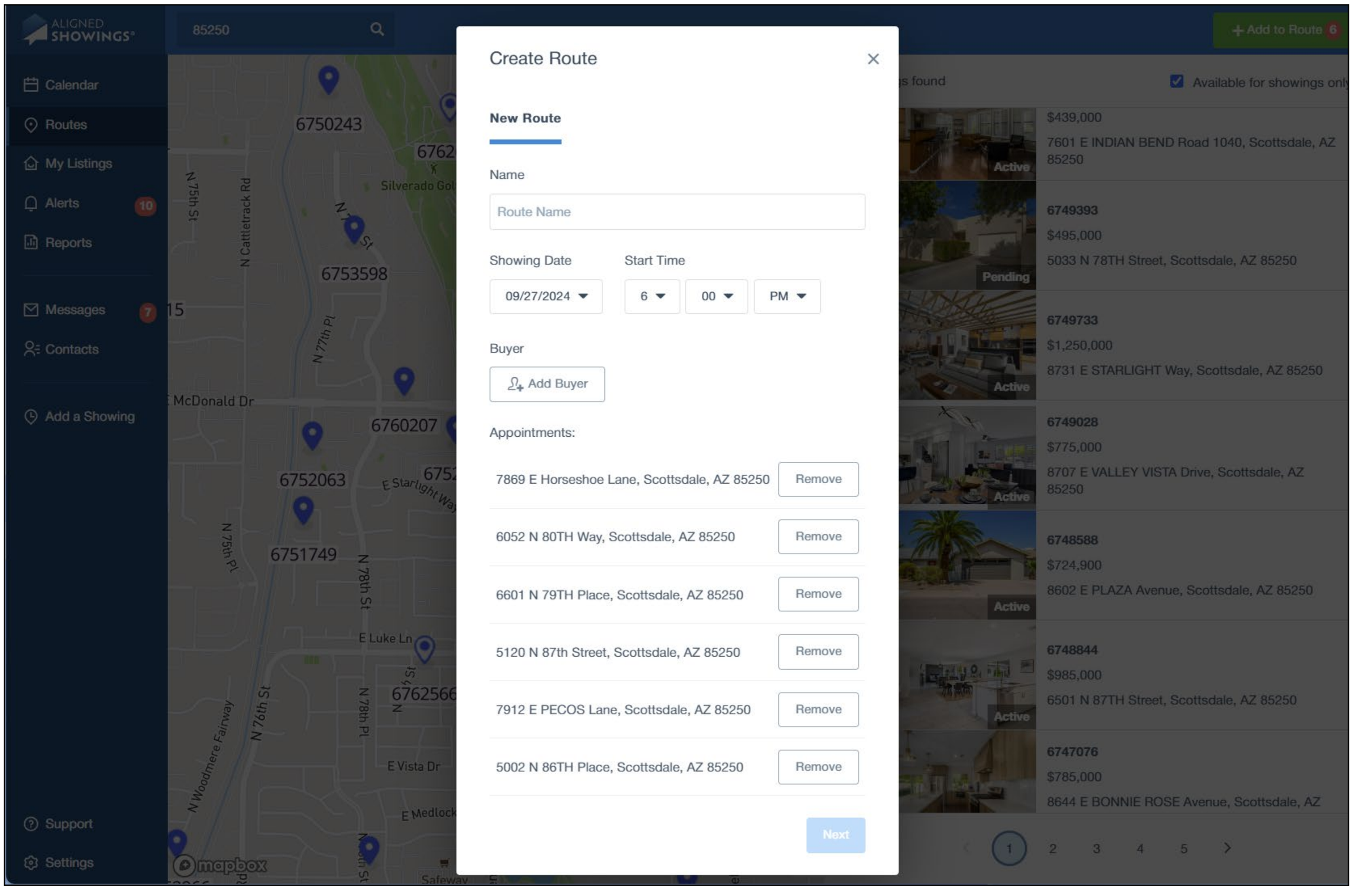


4. Search for the listings to include in the route:
   a. Enter the address, listing ID, or listing agent in the search bar at the top to find a listing and press **Enter** or select the magnify icon.

      Tip! You can enter a partial address including the street number, name, city, or zip code.

   b. Select the arrow or page number at the bottom of the list view to see additional listings that meet your search criteria.
   c. Navigate the map to locate the listings.
5. Select the listings from the list or map to include in the route.

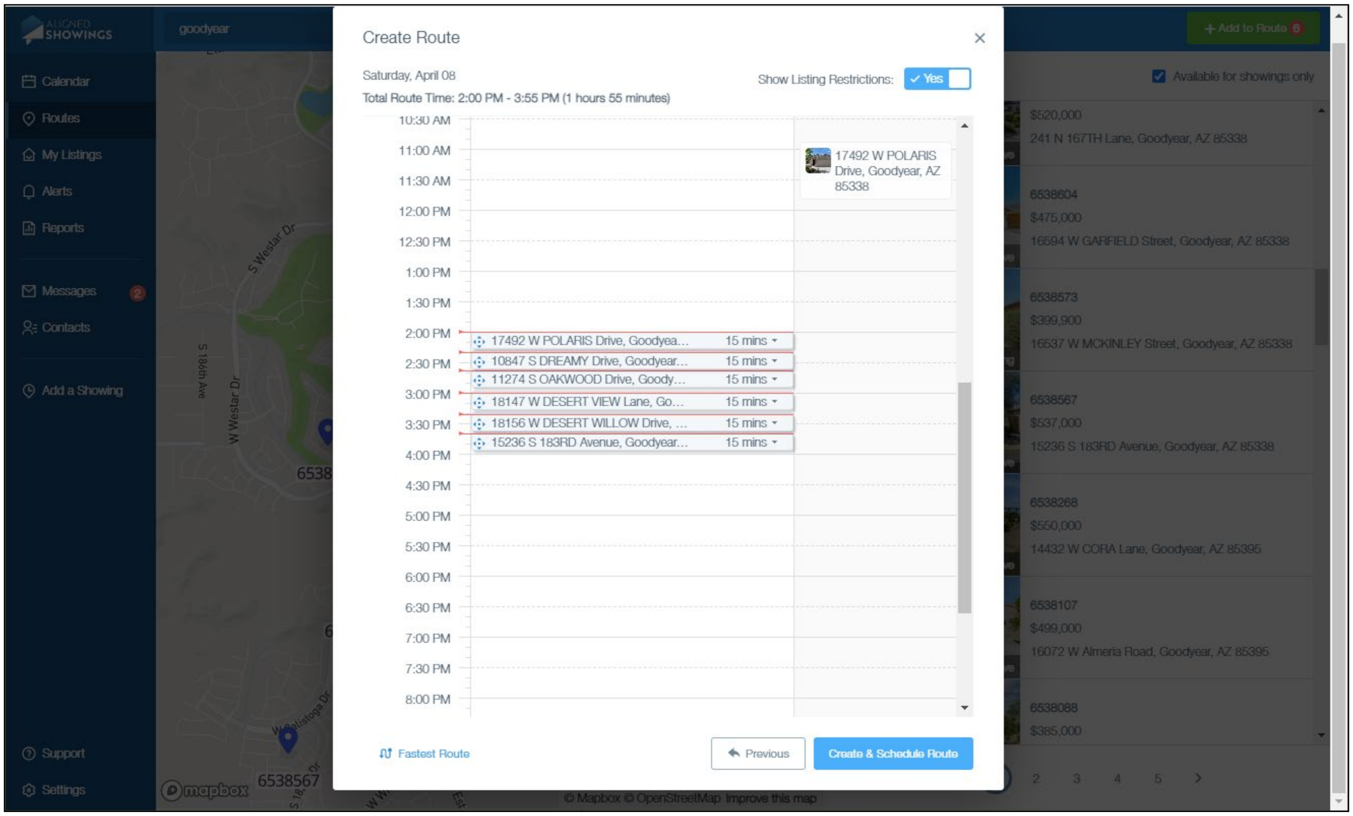
6. Select **Add to Route**. The Create Route screen is displayed.



Note: Select the **Existing Route** tab if you are adding showings onto an existing route.

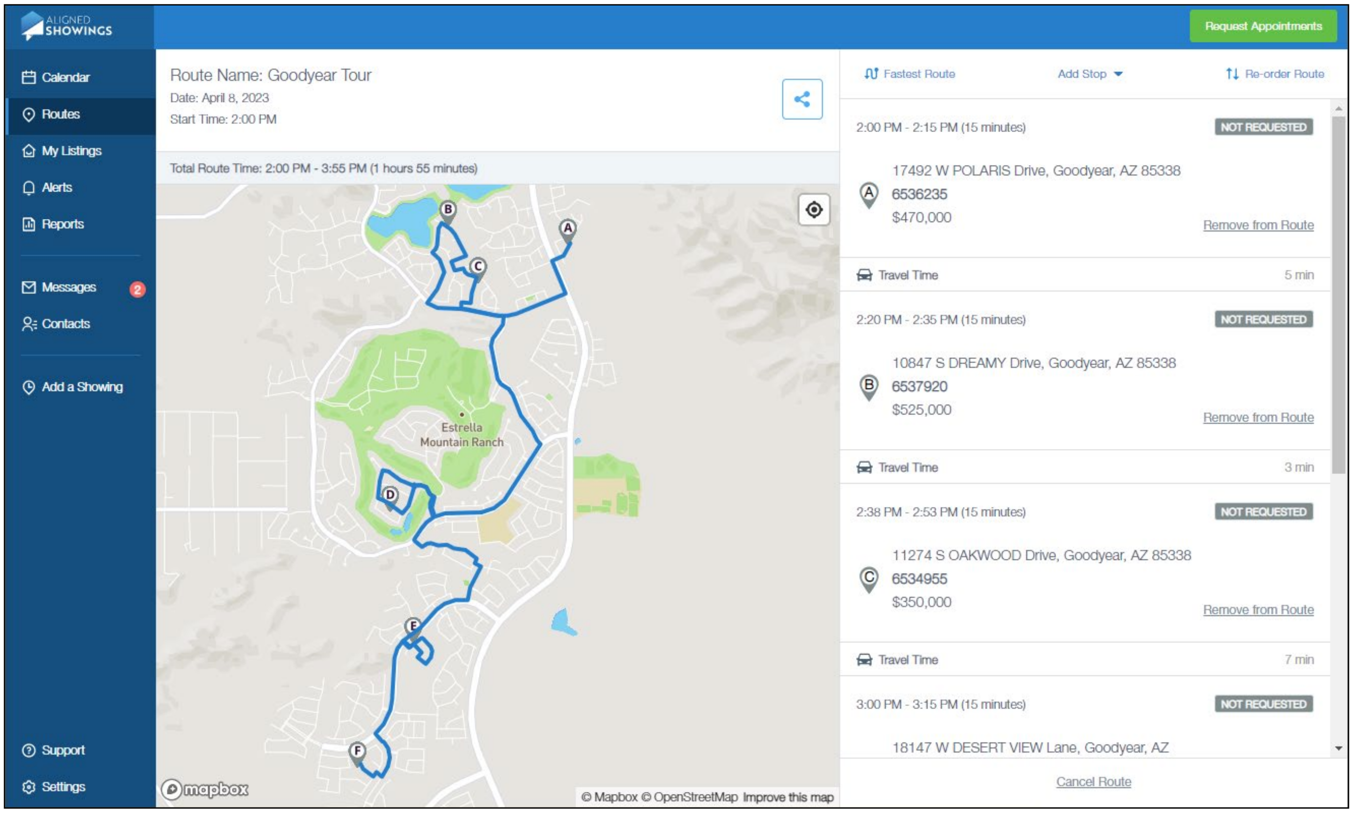
7. Enter a name for your route.
8. Select the showing date.
9. Select the start time for the route.
10. Select the **Add Buyer** button to enter the buyer for the showing. The Add Buyer screen displays.
    a. Enter the buyer name and select them from the list, or select **Create Buyer**.
    b. Enter the first name, last name, primary phone number, secondary number if available, and email address.

11. Select **Next**.

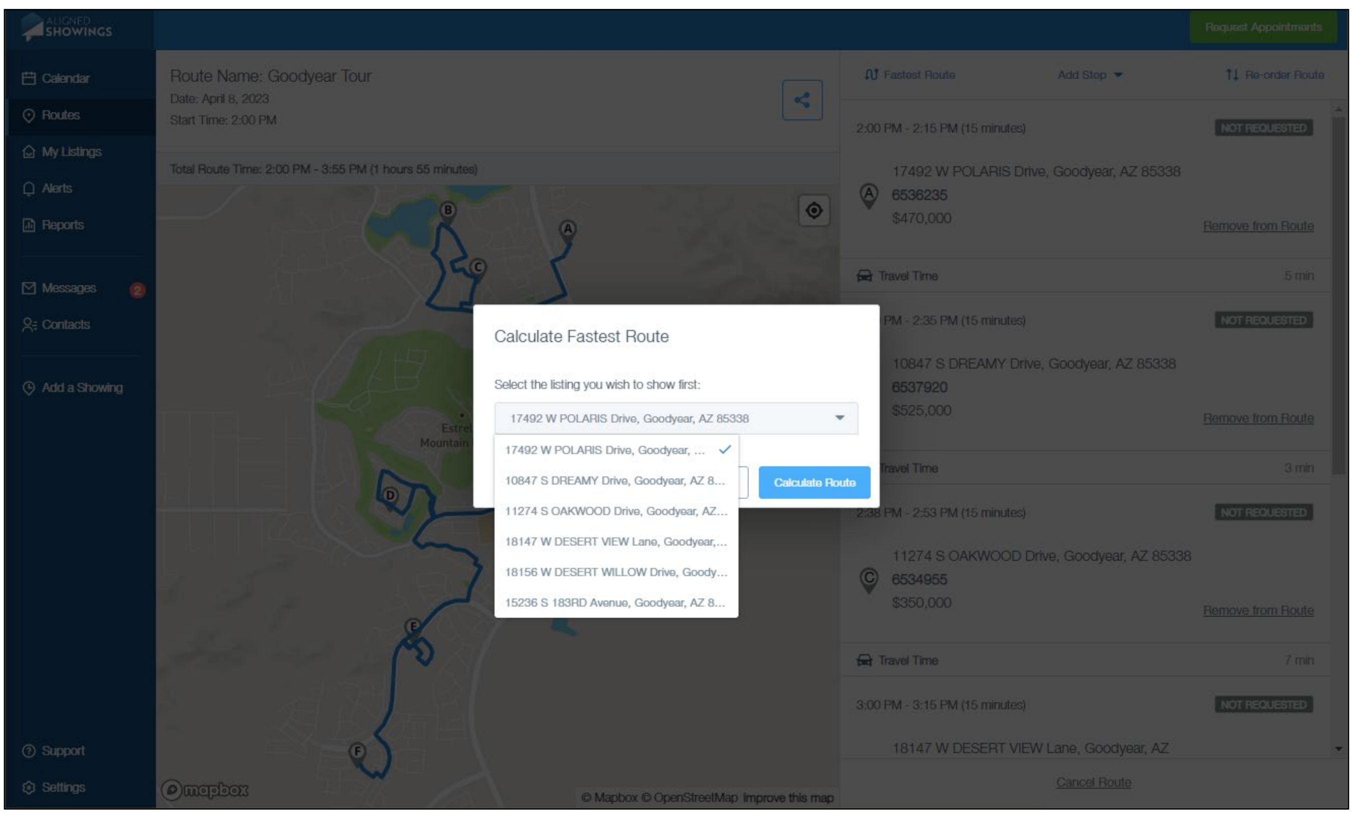


12. You can adjust the route by clicking the down arrow next to each showing to select the planned duration of the showing. Select and drag a showing to move it to the desired time.
13. Select **Create & Schedule Route** to create the route. The system creates a route from the listings you selected and displays it on the map along with the showings in order

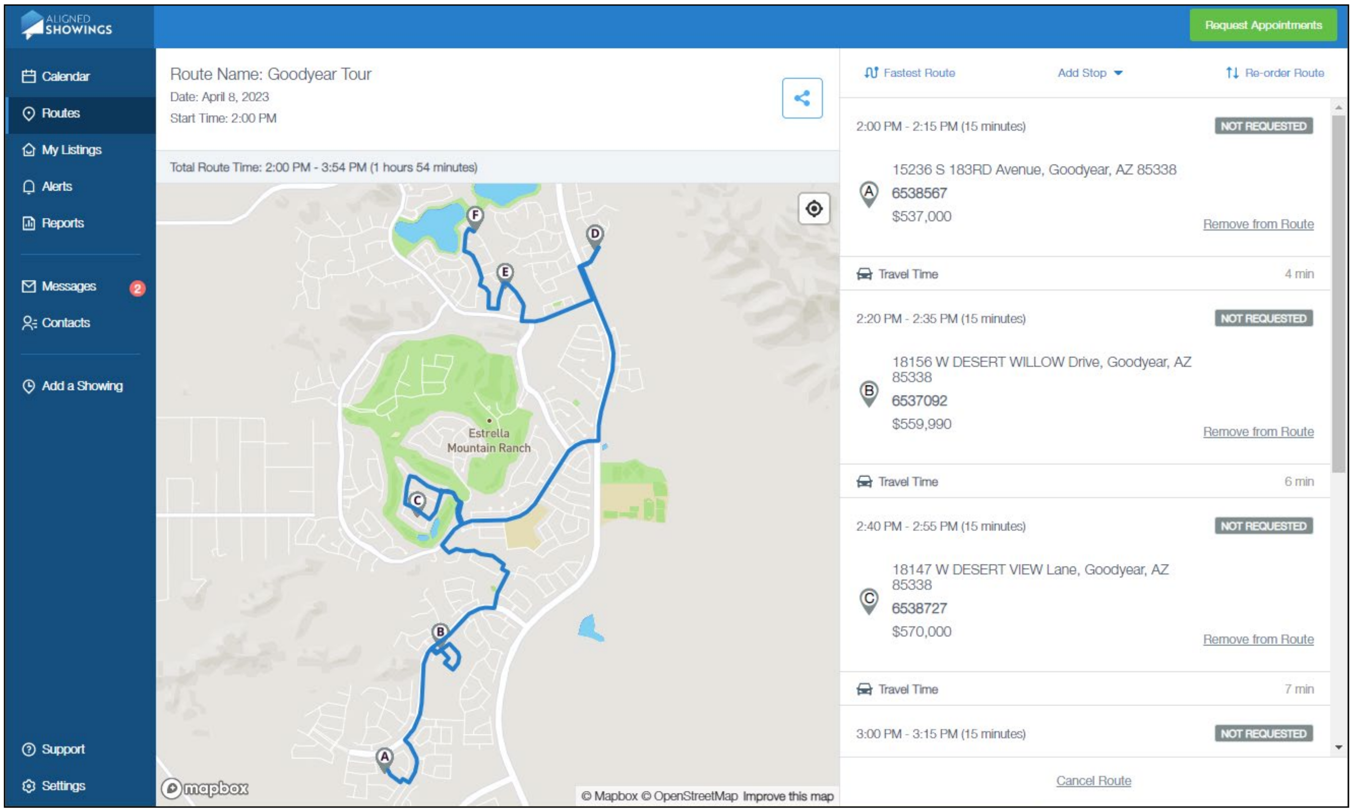
of appointment time.



14. Use the Fastest Route tool to have the system calculate the quickest route.
    a. Select **Fastest Route**.

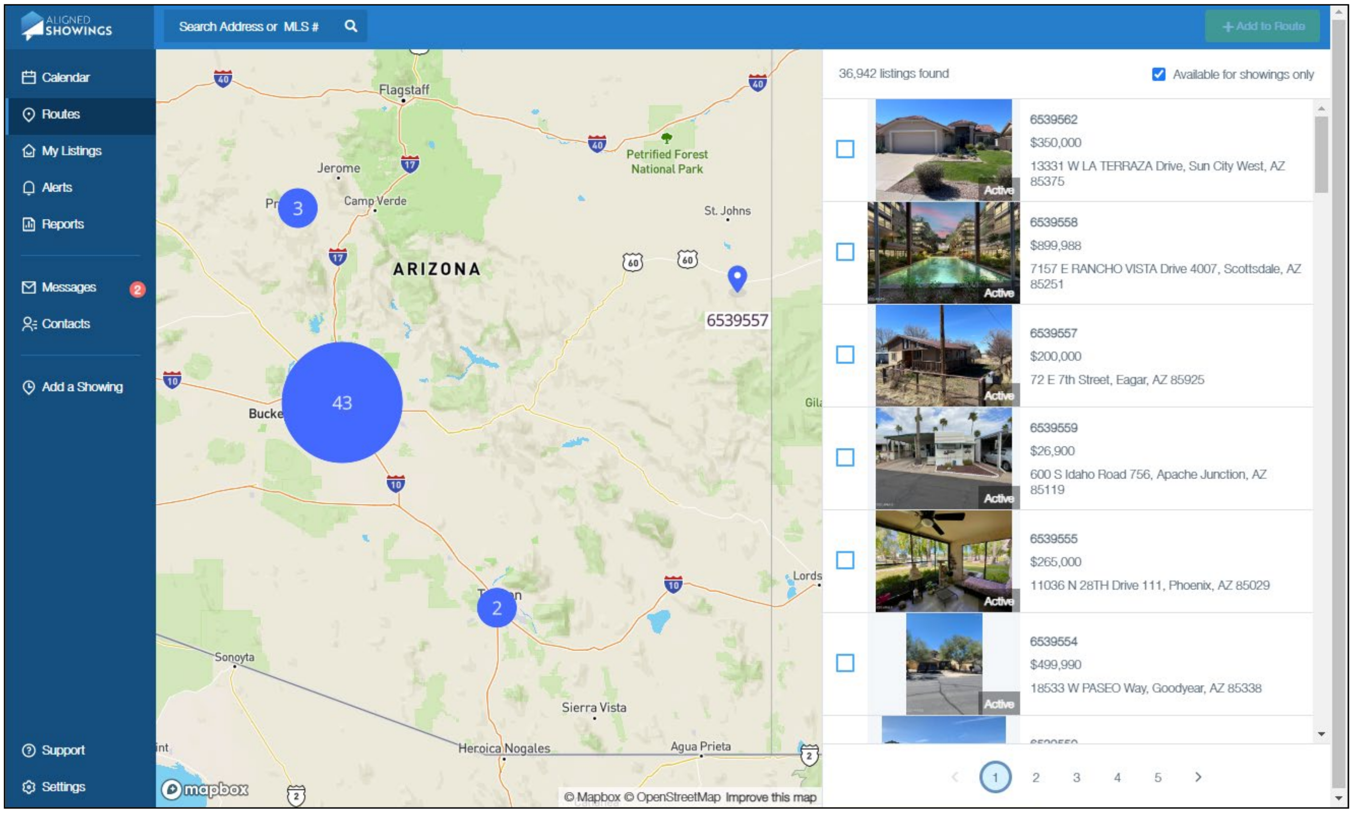


b. Select the listing to show first and then **Calculate Route**.
c. The updated route, order of showing appointments and route time is displayed.



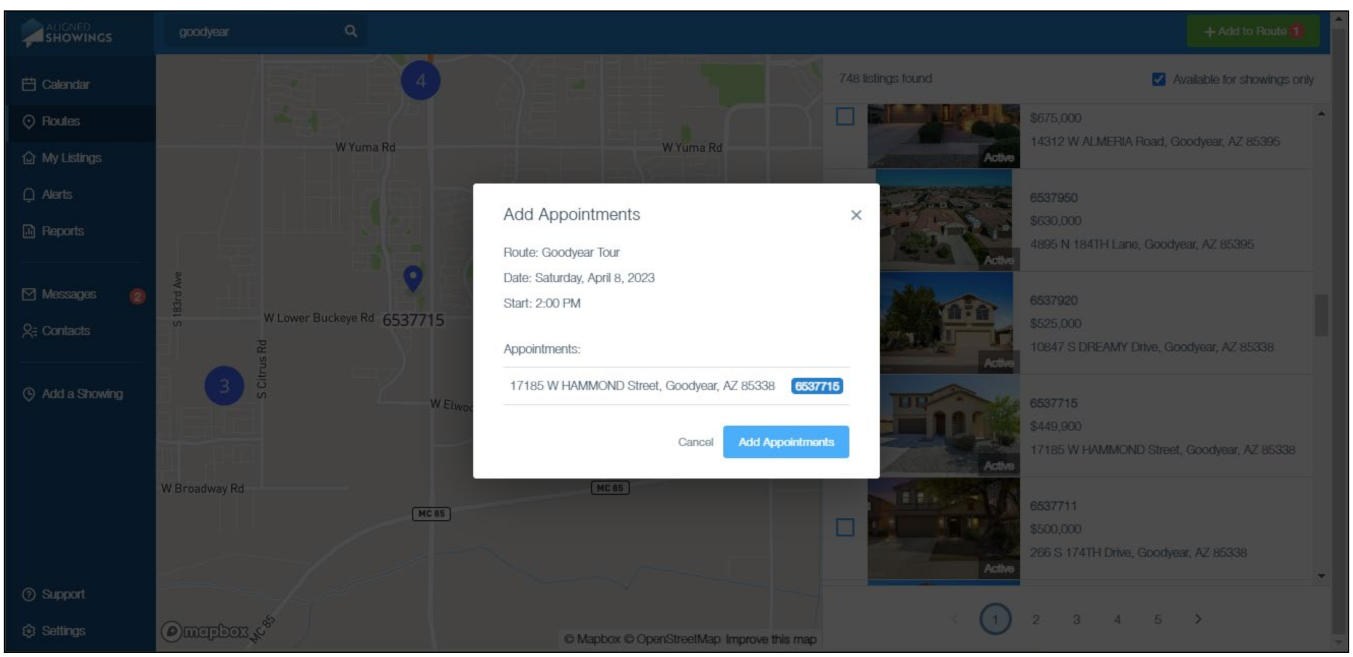
15. Select **Add Stop** and then either **Add New Appointment** or **Non-MLS Stop** to add a

stop to the route.



a. For a non-MLS stop, enter the address, pin, or points of interest, then select **Next**. Select the time of the stop and then select **Add Stop**.

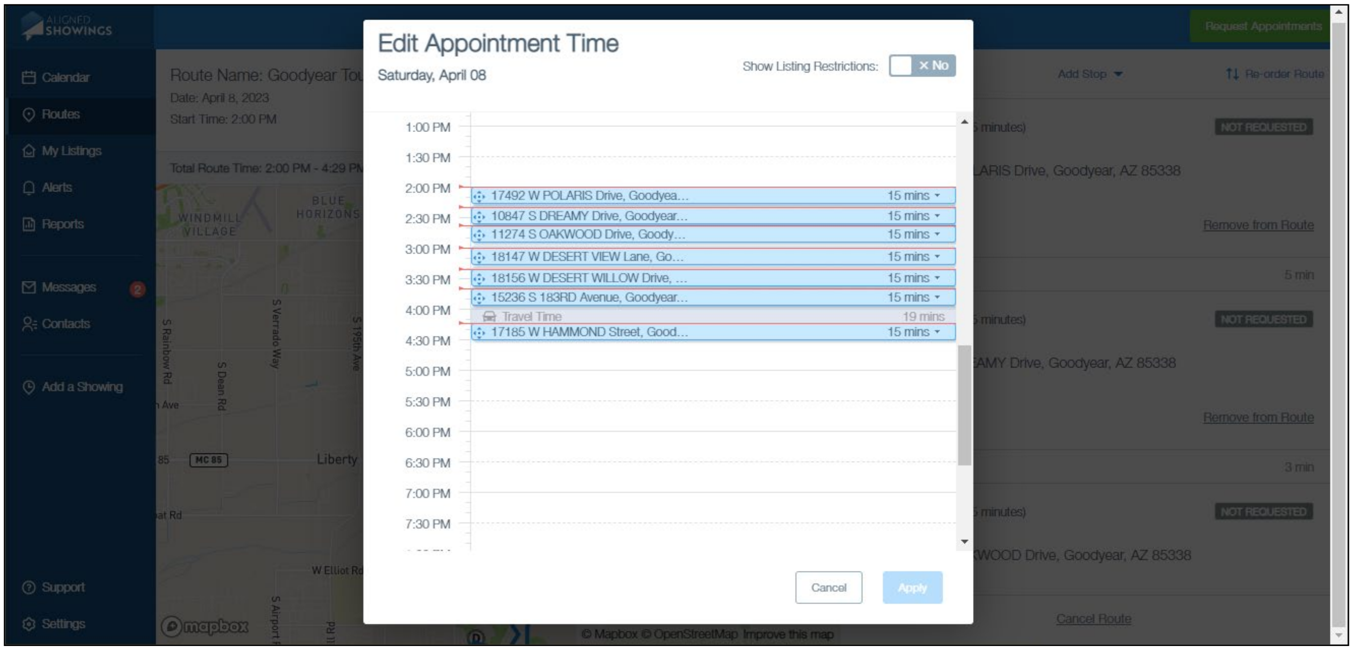
b. For a new showing appointment, search for the listing/s to add, then select **Add to Route**, then **Add Appointments.**



c. The updated route, order of showing appointments and route time is displayed.

16. You can re-order the route to change the order of the showing appointments.

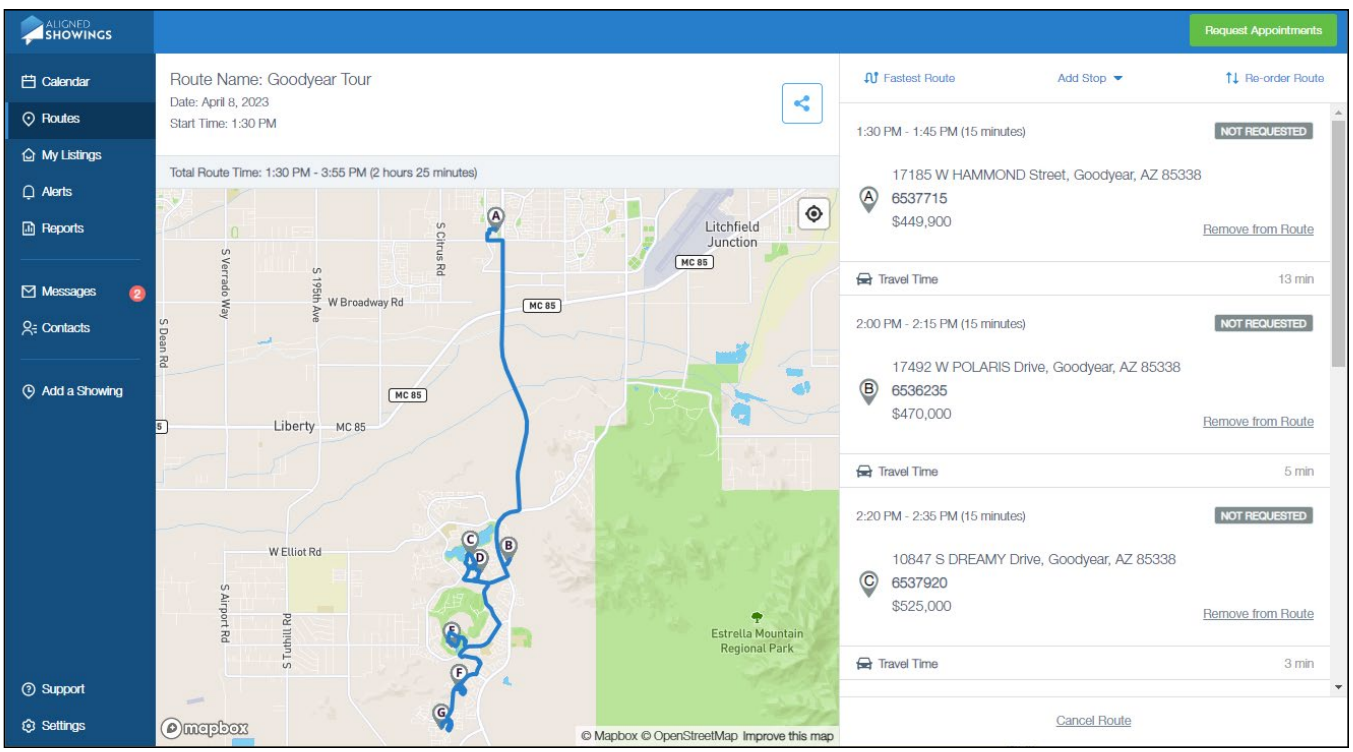
a. Select **Re-order Route**.



b. Select and drag the showing to move it to the desired time.

c. Select **Apply** to save your changes.

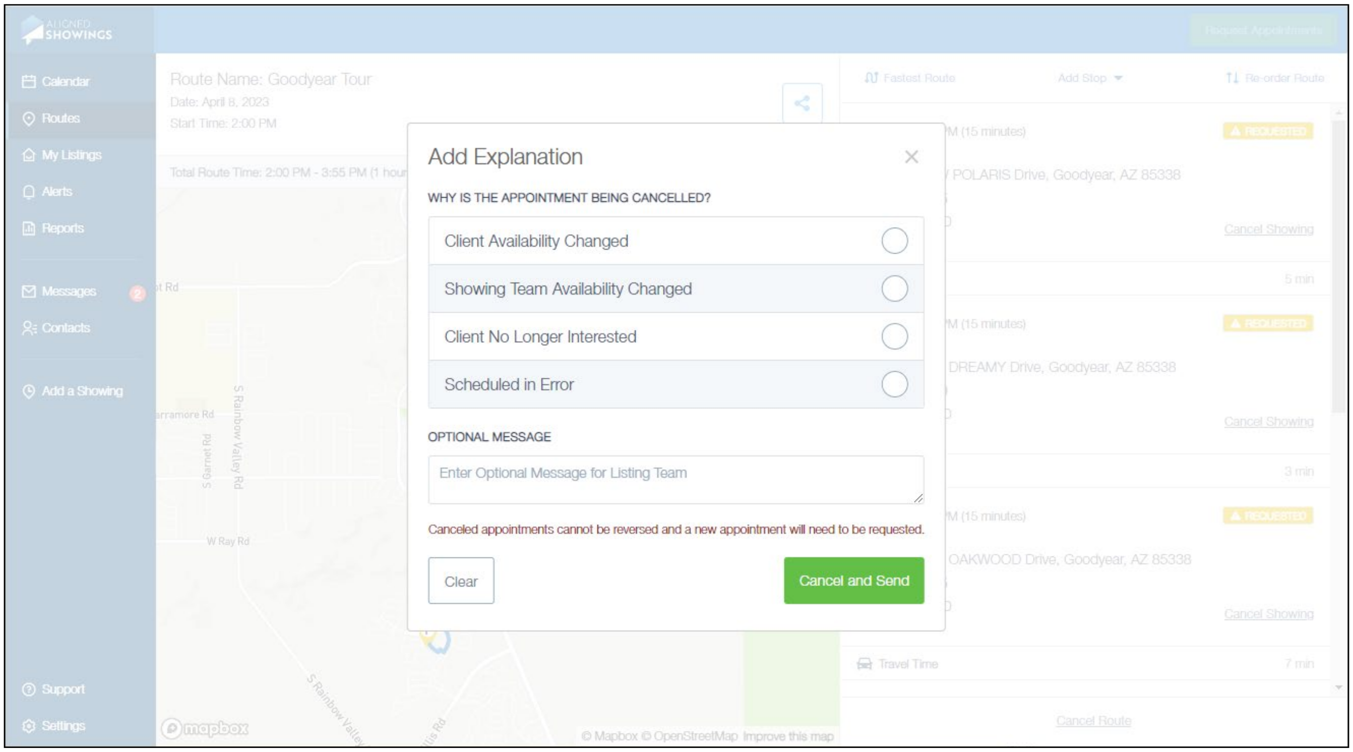
d. Select **Request Appointments**.



17. You can remove a showing from the route.

a. If the appointment has not been requested, select **Remove from Route** and **Yes,**

Remove to confirm.



b. If the appointment to remove from the route has been requested, select **Cancel Showing**. Select the reason for canceling the showing and select **Cancel and Send**.

When the showing appointments are requested, the system sends out showing requests for each listing in your route at the selected date and time. The showing request status will show as REQUESTED until it is APPROVED or DECLINED, or you CANCEL it or it EXPIRES. New appointments are created in the Aligned Showings CALENDAR and a new conversation thread is started for each appointment in MESSAGES.

Tips!

- Some MLS systems support preselecting routes in the MLS and sending the routes to Aligned Showings to schedule the showings. See your MLS for more information.
- ROUTES can be reordered but not changed to a new date. To change the date of a route, cancel the route and create a new ROUTE for that date.
- If a showing request on a route is declined because the requested time isn’t available, you will need to add the showing again to request it at a new time, using the Add Stop feature.

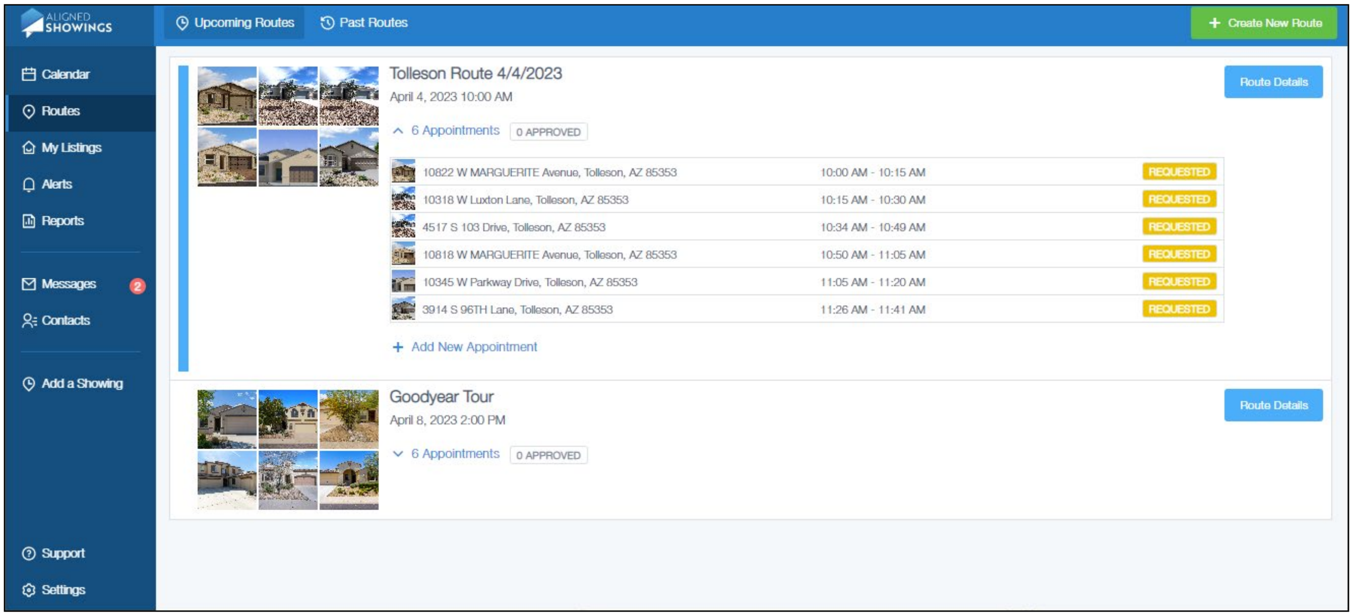
View or Edit a Route

As a showing agent, you can view and edit upcoming routes you have scheduled in Aligned Showings.

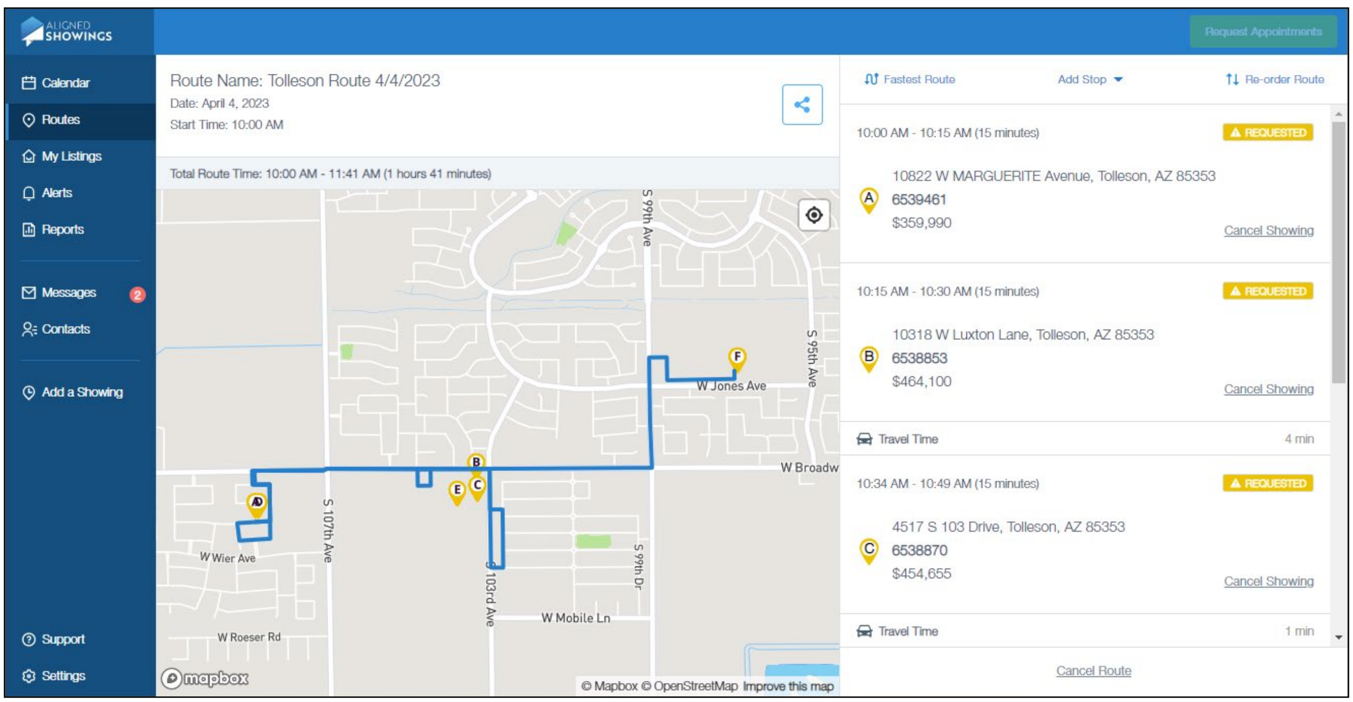
To view or edit a route:

1. Select **ROUTES** in the navigation menu. Your upcoming routes are displayed.
2. On the route you want to view or edit, select the down arrow to view the list of

appointments.



3. Select **Route Details**.



4. From the Route Details screen you can:
   a. Select **Fastest Route** to have Aligned Showings calculate the fastest route based on your first stop.
   b. Select **Add Stop** to add another stop to the route.
   c. Select **Re-order Route** to change the order of the appointments.

Tips!

- Once a route time has started, you can add a stop to the route but can't re-order the route or use the fastest route tool.

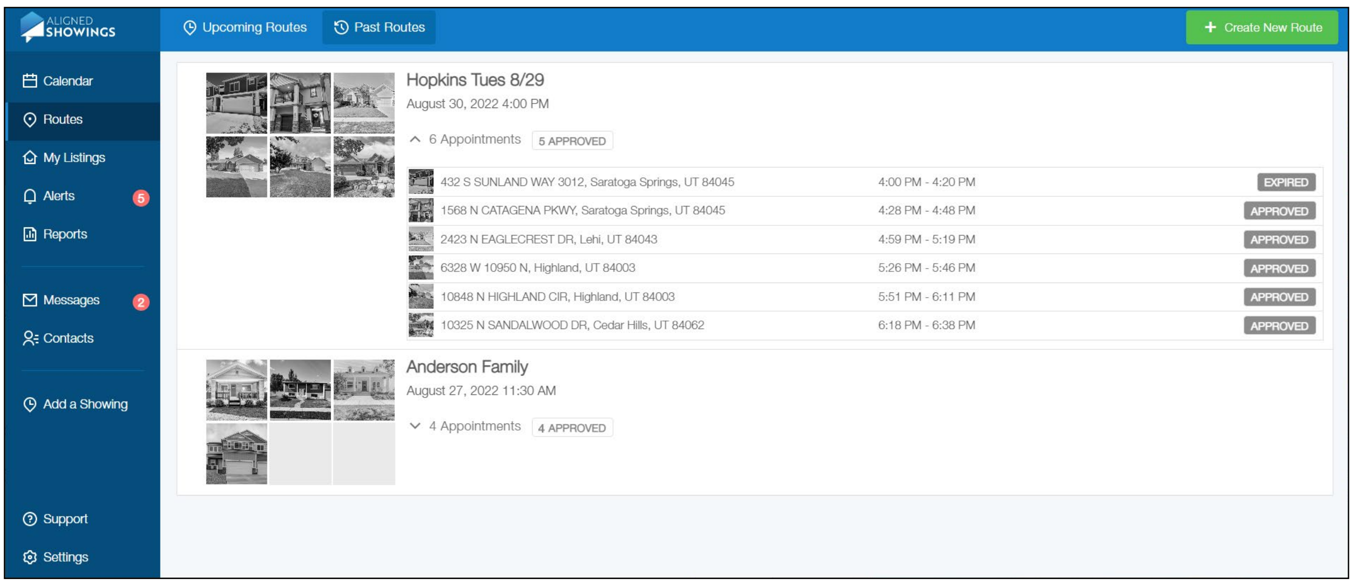
- Reorder the route or calculate the fastest route before you select **Request Appointments** to request the showing appointments. If you change a showing time or reorder the route after the showing requests are issued, new showing requests are sent out for approval.
- You can add listings to an existing route. Select **Routes**, then select **Create New Route**. Select the listings, then select **Add to Route**. Select the **Existing Route** tab and choose the route. Click **Next**. You can re-order the route or use the fastest route tool. Then select **Request Appointments** to finalize the appointments.
- If a showing is declined because the requested time isn't available, use **Add Stop** to add the showing at a new time.

View Past Routes

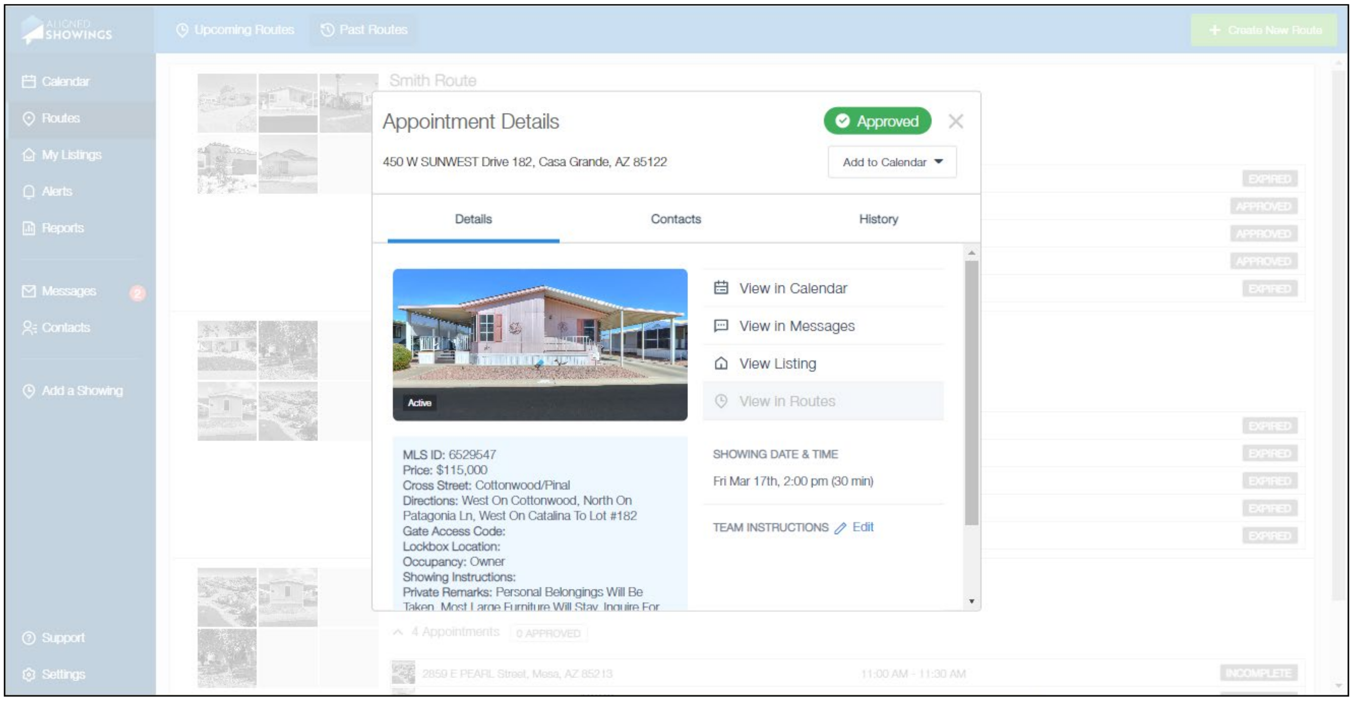
As the showing agent, you can view previous routes in Aligned Showings.

To view past routes:

1. Select **ROUTES** in the navigation menu. Your upcoming routes are displayed.
2. Select the **Past Routes** tab.
3. Your past routes are displayed. Select the down arrow to view the list of appointments.



4. Select an appointment to view the appointment details.

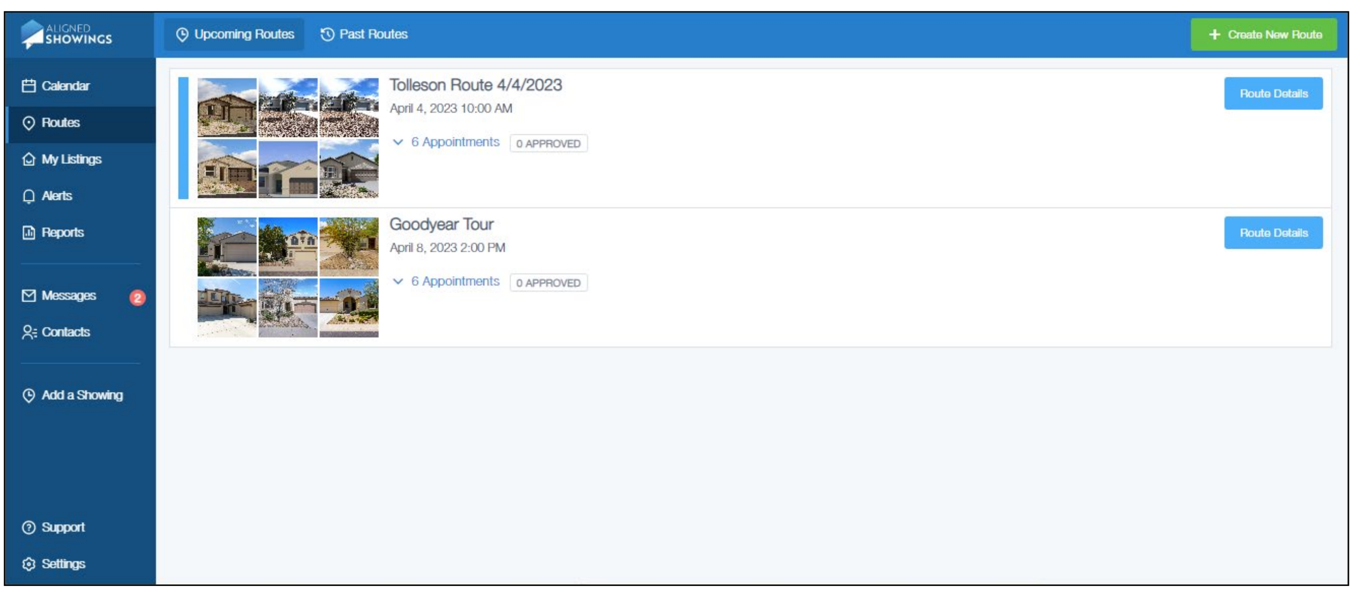


Cancel Route

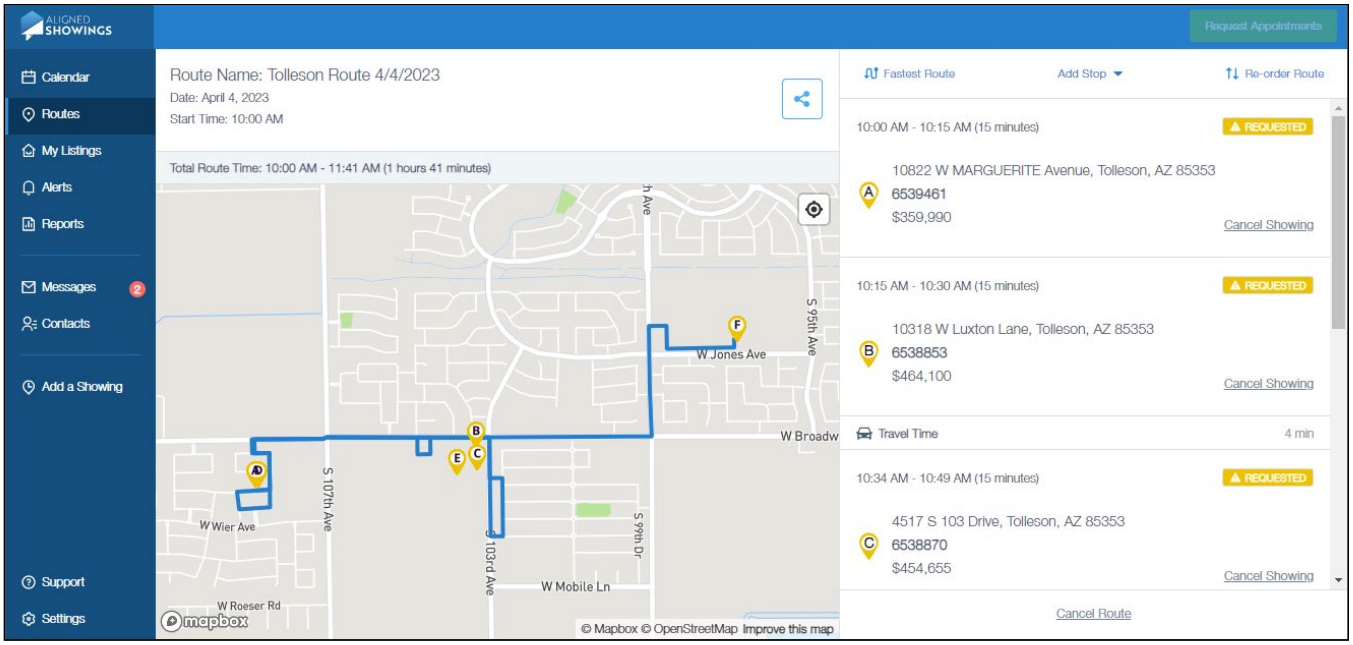
Once a route is scheduled, you can cancel it if plans change. To cancel or change part of a route, see ***View or Edit a Route***.

To cancel an entire route:

1. Select **ROUTES** in the navigation menu.
2. Your upcoming routes are displayed.



3. Select the **Route Details** button. The details of your route is displayed.



4. Select the **Cancel Route** link.
5. Select **Yes, Cancel Route** to confirm.
6. The route is canceled and messages are sent to the listing agents informing them of the cancellations.

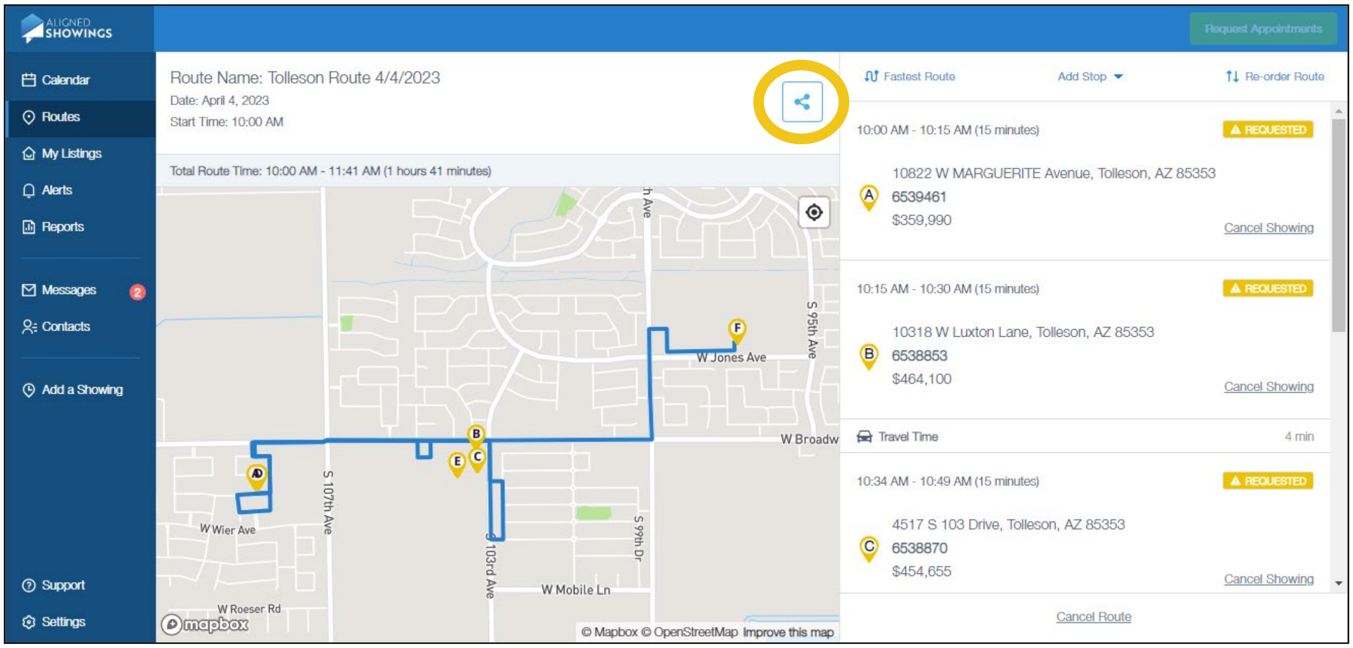
Share a Route

Once a route is scheduled, you can share it with your clients.

To share a route:

1. Select **ROUTES** in the navigation menu to display your upcoming routes.
2. Your upcoming routes are displayed.

3. Select the **Route Details** button. The details of your route is displayed.
4. Select the **Share** button at the top of the screen.



5. Select **Copy to clipboard** and you can then paste the route information into an email as an easy way to share route details with your clients or team members.
6. Select **Share via PDF** to save the route information to a PDF file.

Messages

MESSAGES in Aligned Showings is a powerful communication tool.

There are three types of messages in Aligned Showings:

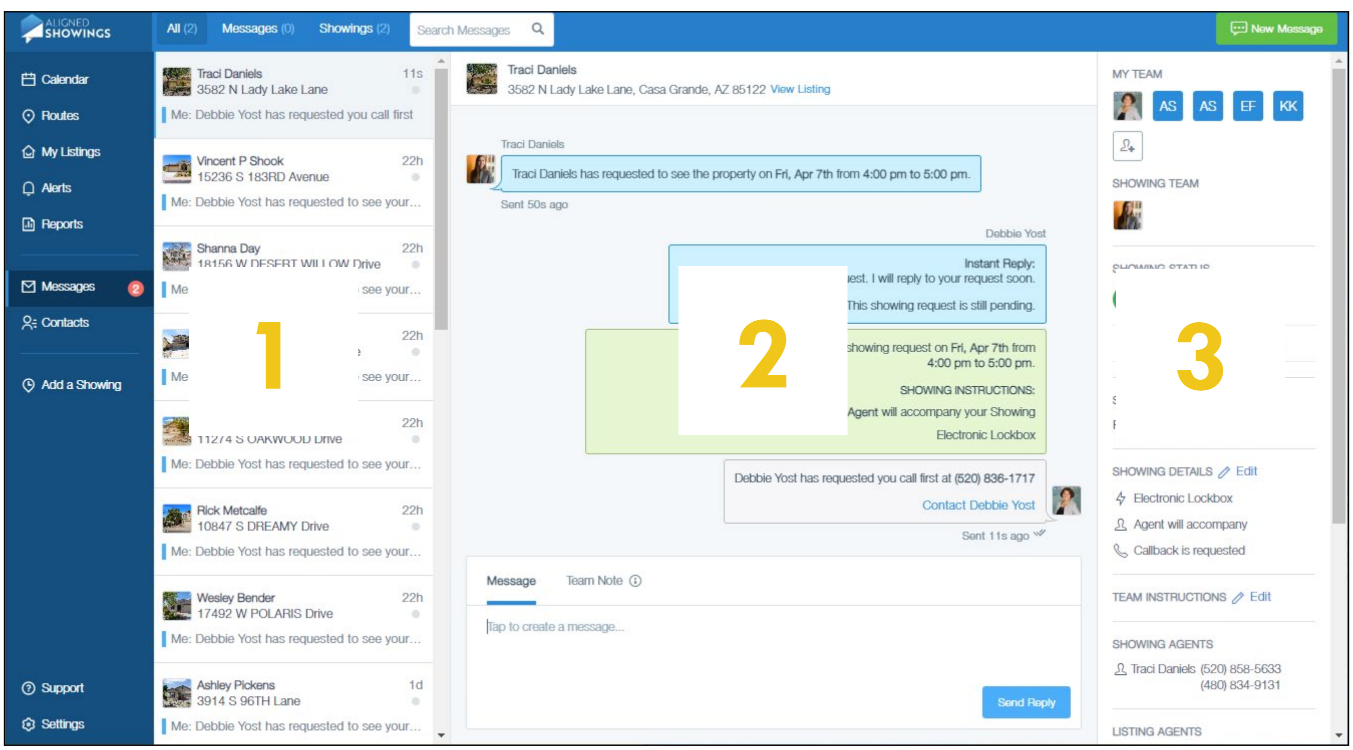
- Showing conversations - When a showing is requested, a conversation is started between the listing agent and listing team members, and the showing agent. Information about the showing such as showing request approvals, showing instructions, and showing feedback appear within the showing conversation. MESSAGES allows you to keep all of the information and conversation about the showing in one easy to reference place.
- Direct messages - Agents can also send a direct message to another agent, or a group message to agents in their office.
- Broadcast messages - You can send one broadcast message per showing to all of the showing agents with approved or pending showing requests.

Note: Seller/Tenants can not participate in showing conversations in Aligned Showings.

IA red circle on the MESSAGES menu option in the navigation bar indicates the number of unread messages. At the top of the Messages screen, you can filter by all messages, direct messages, and showings and see how many in each category are unread. You can also search for messages.

The MESSAGES screen consists of a three-panel:

1) A CONVERSATION LIST on the left displays all your conversations in a scrollable view. Select a message to display it to the CONVERSATION VIEW.
2) THE CONVERSATION VIEW display all messages for the showing.
3) A SHORTCUTS PANEL displays additional information for the showing appointment.



Showing Conversation

To start a new showing conversation in MESSAGES:

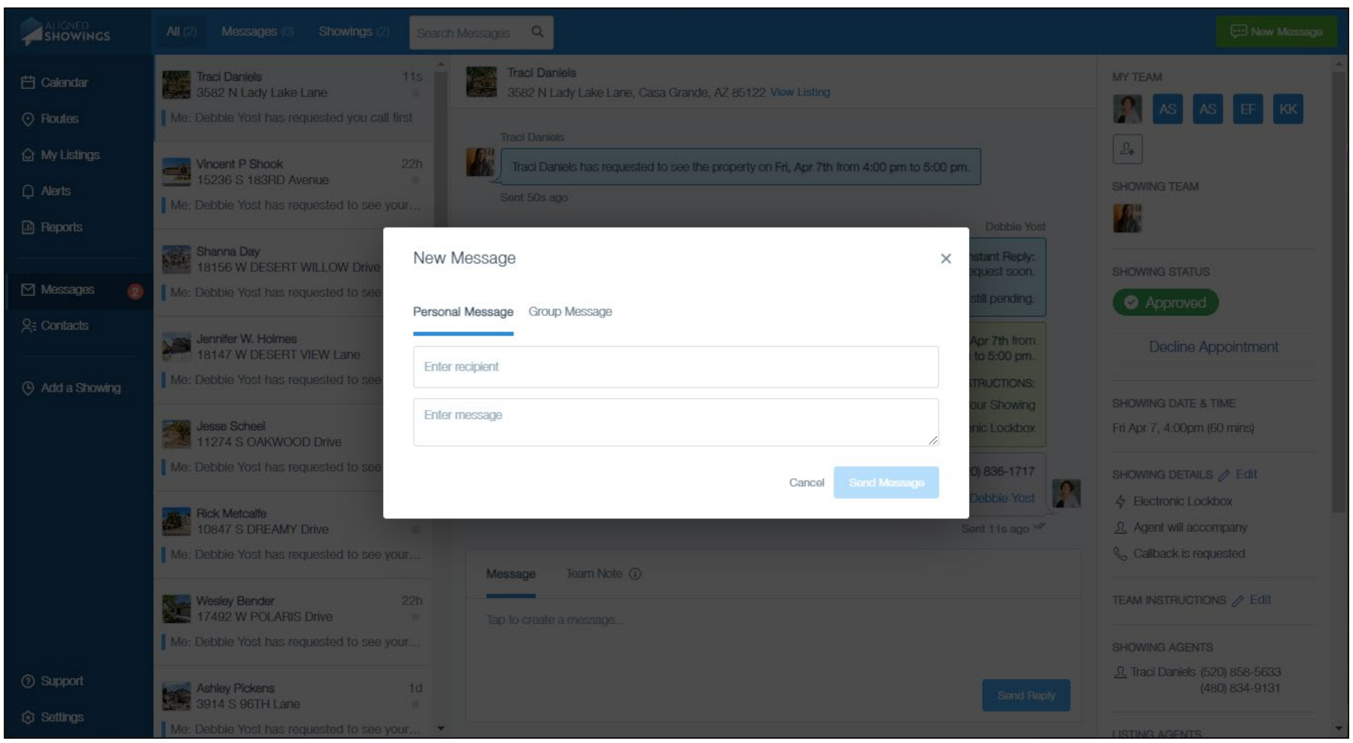
- Add a showing request, or
- Create a new route

See ***Schedule Showings*** and ***Create a Route*** for more information.

Direct Message

To create a new direct message to an agent:

1. Select **MESSAGES** in the navigation menu.
2. Select the **New Message** button in the upper right.
3. The New Message screen is displayed.



4. Select **Personal Message** or **Group Message**. Note that group messages are restricted to team members in your office.
5. Enter the recipient name.
6. For a group message, enter an optional group chat name.
7. Enter the message.
8. Click **Send Message**.

To send a direct message to an agent from CONTACTS:

1. Select **CONTACTS** in the navigation menu.
2. Locate the recipient, or one of the recipients for a group message and click the message icon next to their name.
3. Select **Personal Message** or **Group Message**.

4. Enter the recipient name(s).
5. For a group message, enter an optional group chat name. You can also add a group chat name at the top of a message that begins as a personal message when you add an additional recipient.
6. Enter the message.
7. Click **Send Message**.

Important! If message recipients do not use Aligned Showings, messages will be sent as an email.

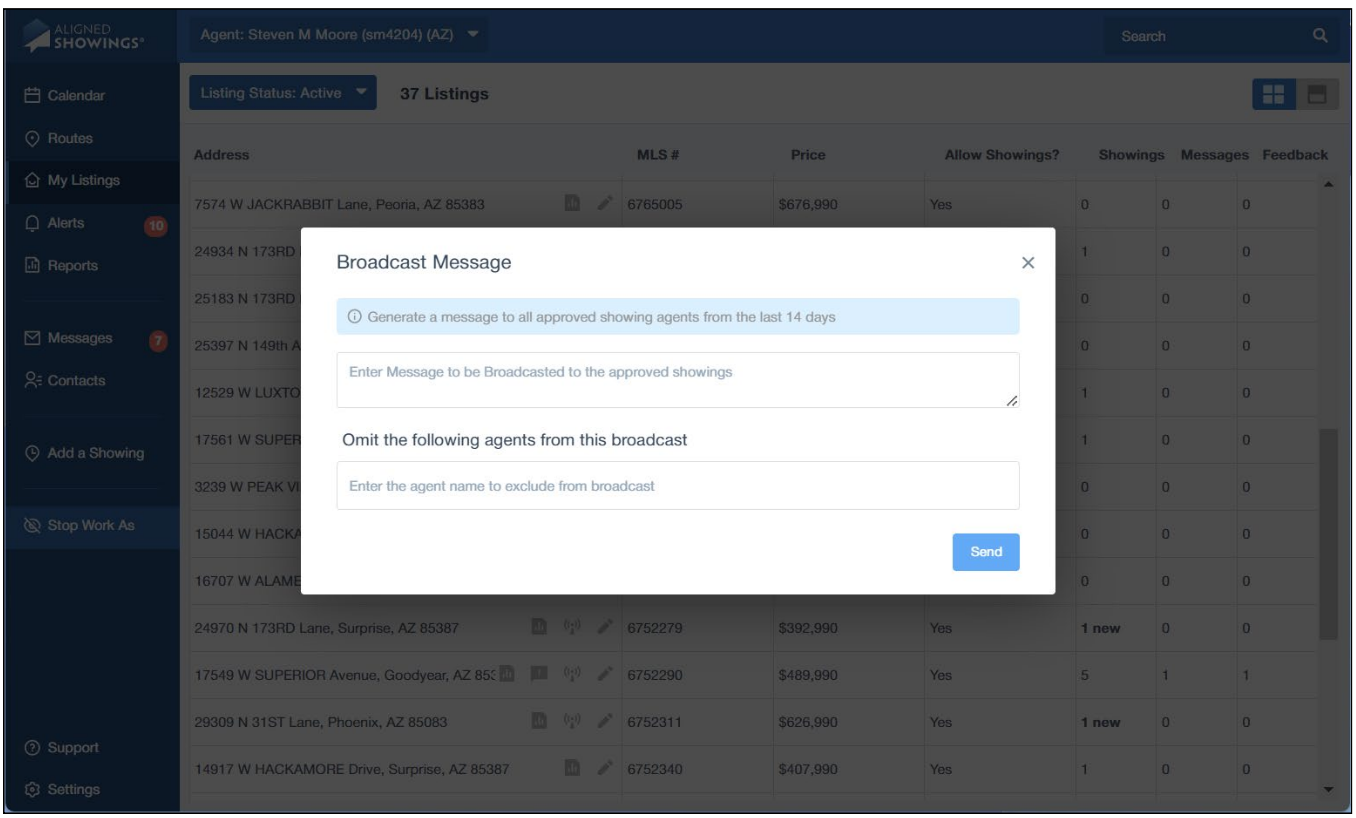
Broadcast Message

You can send a broadcast message to the agents that have approved or pending showing requests for your listing. This is a useful tool to let showing agents know if something has changed with the listing that might be of interest to their clients such a price or feature change, or as a notice such as accepting final offers on the listing.

Important! Your MLS may restrict you to only send one broadcast message per listing.

To send a broadcast message:

1. Select **MY LISTINGS** in the navigation menu.
2. Select the listing.
3. Select the **Broadcast** icon. The Broadcast Message window displays.



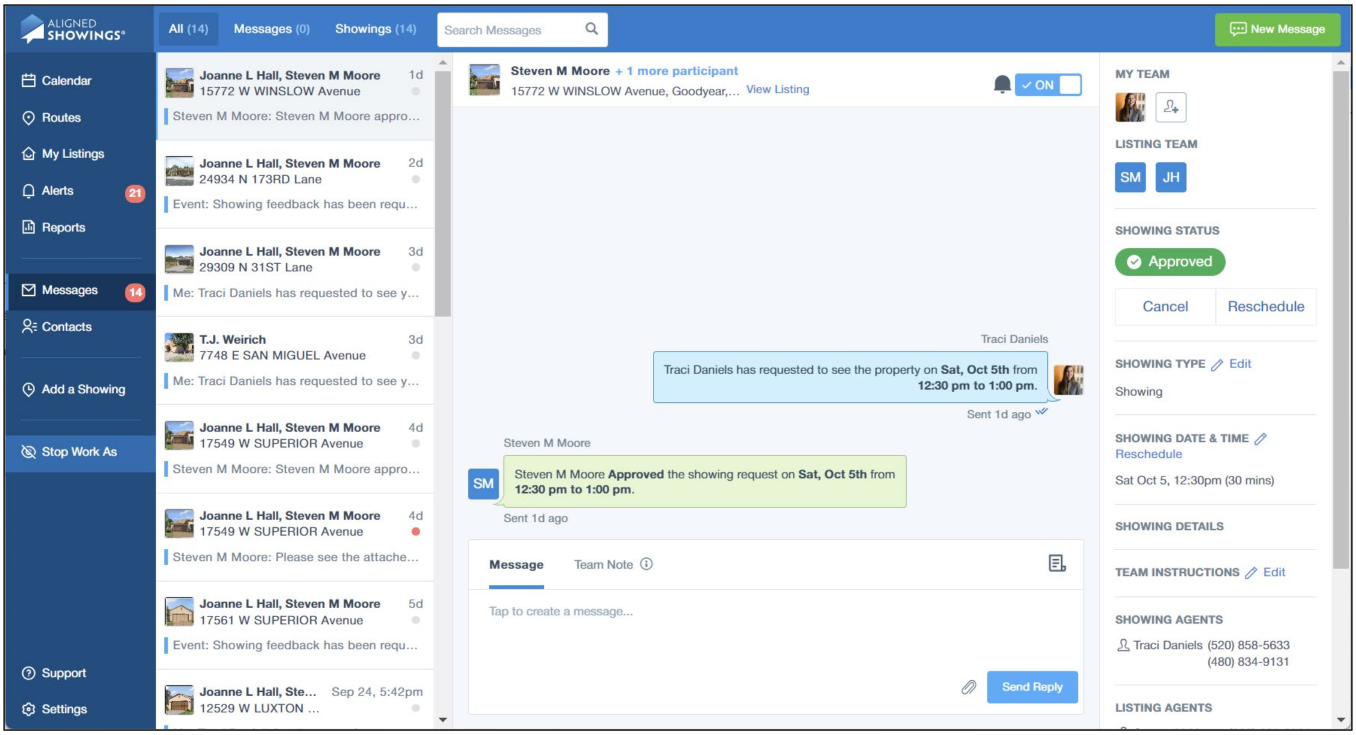
4. Enter the message.
5. To omit any agents from receiving the message, search for their name and select them.

6. Select **Send**.
7. A message is created in MESSAGES and the message is sent to the showing agents by email and/or text message, depending on their showing notification preferences.

As a showing agent you can opt out of receiving showing messages for a listing.

To opt out of receiving broadcast messages:

1. Select Messages.
2. Locate and select the showing conversation.



3. In the upper right of the conversation view, turn off **Receive broadcast messages from this listing**.

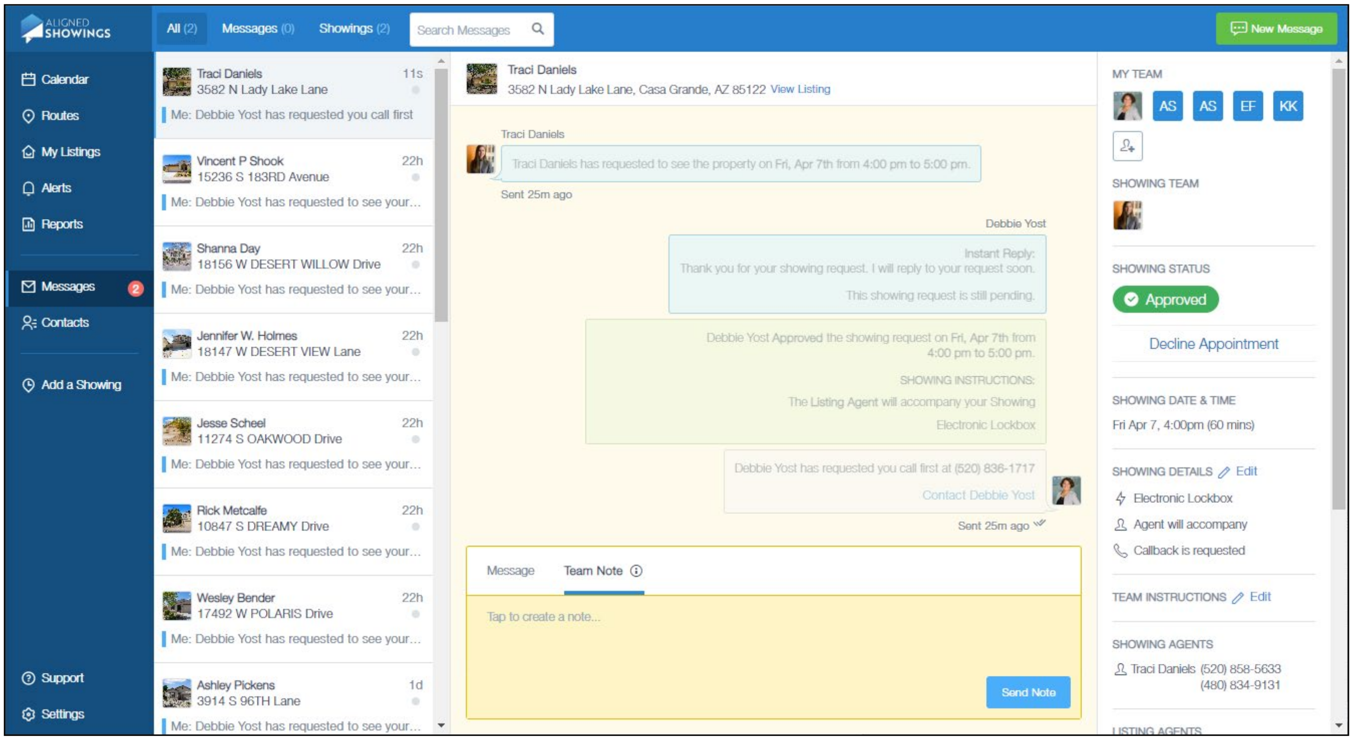
View and Manage Messages

Once a showing message is created, there are several tasks that can be done within MESSAGES.

To view and manage messages:

1. Select **MESSAGES** in the navigation menu. All messages are displayed by default, sorted with the most recent at the top.
2. Use the **Search** field to search for messages by MLS ID, agent name, address, or keyword.
3. To view only direct messages not tied to a showing appointment, select the **Messages** tab. To view only conversations related to a showing appointment, select

the **Showings** tab.



4. As a listing agent or listing team member you can:
    - Add a listing team member to the showing conversation by selecting the **+** button in MY TEAM
    - Remove a listing team member (except the listing agent) from the showing conversation by selecting the **x** on their tile in MY TEAM
    - View the seller/tenant for the listing; Select a seller/tenant's tile to view contact information and copy their unique seller appointment link
    - Approve or Decline the showing request
    - Edit showing details
    - Enter Team instructions viewable only by the listing team
    - Send a message to the showing and listing teams
    - View showing feedback
    - Enter Team Notes only visible by the listing team using the Team Note tab
5. As a showing agent or showing team member you can:
    - Add showing team members to the conversation by selecting the **+** button in MY TEAM
    - Remove a showing team member (except the showing agent) from the showing conversation by selecting the **x** on their tile in MY TEAM
    - Cancel a showing appointment
    - Edit the date and time of the showing
    - Enter Team instructions viewable only by the showing team
    - Send a message to the showing and listing teams
    - Send showing feedback

- Enter Team Notes only visible by the showing team using the Team Note tab

Important! Please always use your best judgment when communicating within Aligned Showings. Conversations can be reported for improper conduct or behavior.

Tips!

- Showing agents can add a showing team member is in MESSAGES.
- Conversations are viewable by all team members on the listing and showing sides.
- Showing conversations and direct messages remain in Aligned Showings.
- New messages will generate a notification (ALERT, email, and text message) by default. Users can adjust notification preferences in the SETTINGS section.
- The timestamp on each message is in the timezone for the MLS. There is only one timezone designated for an MLS.
- Team Notes are a great option for users to send custom messages to their team only (i.e. “the listing agent said to make sure to lock the back door”). These notes will appear in light yellow and are only viewable by team members on their respective side.
- When a team member is removed from a showing conversation, the showing is removed from their CALENDAR and MESSAGES.
- If recipients do not have Aligned Showings, team notes are sent to them by email.
- Messages in Aligned Showings can contain emoji.

Notifications

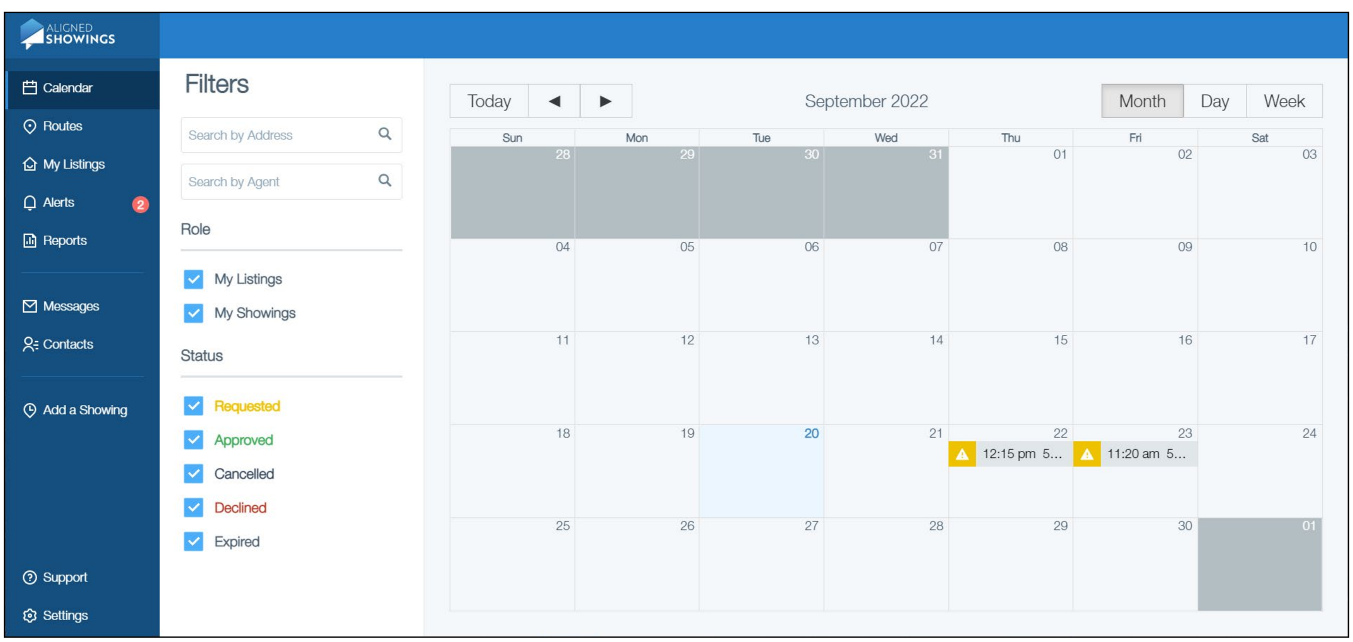
Notifications in Aligned Showings send alerts when certain actions have occurred. There are three types of notifications: ALERTS, EMAILS, and TEXT messages. ALERTS automatically appear in Aligned Showings. You can opt in to receive EMAILS and TEXT messages. See ***Settings*** for more information on how to opt in or out of emails and text messages.

The following actions generate a notification:

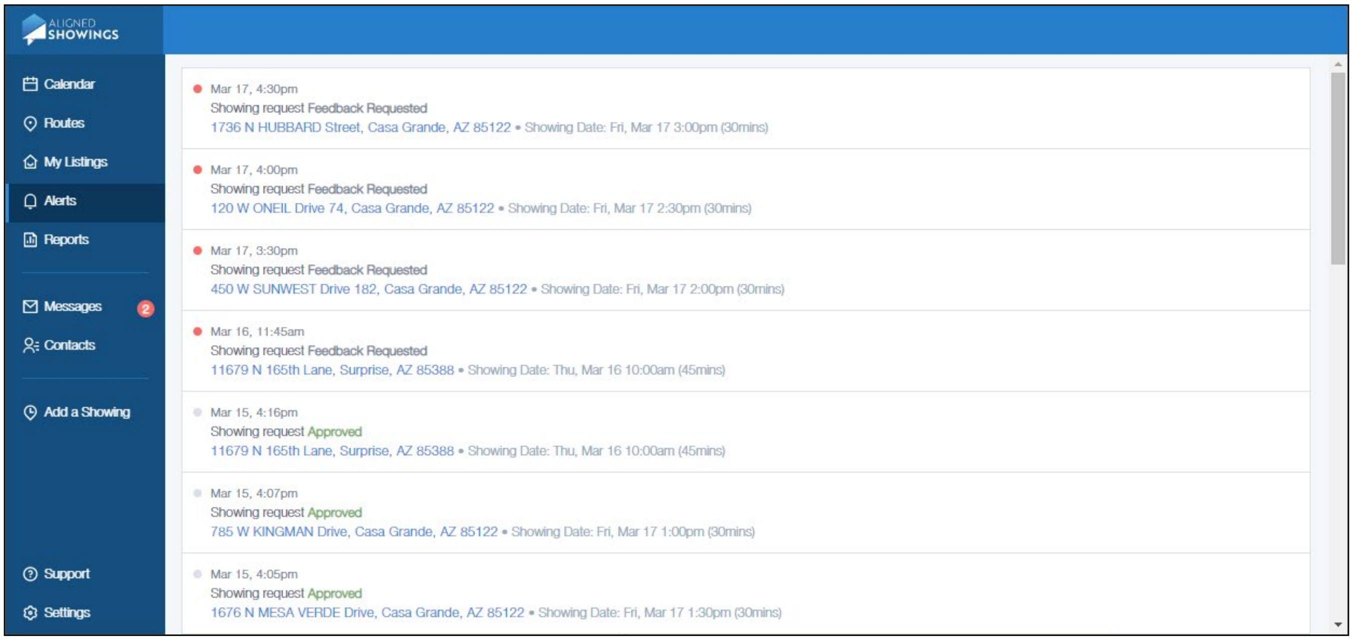
- REQUEST a showing appointment; this is repeated if there is no response
- APPROVE a showing appointment
- DECLINE a showing appointment
- CANCEL a showing appointment
- RESCHEDULE an appointment
- SHOWING ACCESS is changed on an approved showing request
- SHOWING FEEDBACK is requested or received
- ACCEPTED OFFER on an approved showing request
- NEW message in an ongoing conversation
- NEW direct message
- Team note sent on a showing conversation
- Auto-generated email/text daily reminder of appointments; note these do not display as alerts in Aligned Showings but are sent as email and/or text message
- Seller/Tenant Unsubscribes from receiving showing requests

To view notifications in Aligned Showings:

1. Select **ALERTS** in the navigation menu. The alerts are displayed, sorted with the most recent at the top. When you have unread alerts, a red circle over the ALERTS menu option in the navigation bar indicates the number of unread alerts.



2. The alerts are displayed sorted with the most recent at the top. Notifications that are waiting for your action show as a red dot to the left of the notification.



3. Select the address link to view additional information about the alert.

If you opt in to receive notifications via email or text messages, you will receive an email or text message for each alert.

Note: The example email below could look slightly different depending on the email client you use.

If there is no response to a showing request from the LISTING TEAM, the notification is repeated two (2) hours after the initial notification and then again two (2) hours later as long as it is prior to the showing start time.

Approved and canceled showing notification email messages can include a calendar file attachment (.ICS) that can be imported into popular calendar applications.

Showing Confirmed: 297 18TH ST SE, Salem, OR 97301 on Friday, Aug 9th at 2:00 pm

DS Dave Smith (Aligned Showings) <noreply@alignedshowings.com>
To Jim Anderson

invite.ics
1 KB

Showing Confirmed - Calendar invite ATTACHED.

Click Here to use Aligned Showings to message the agent, modify the showing, update the appointment status, and more.

Showing Confirmed For:

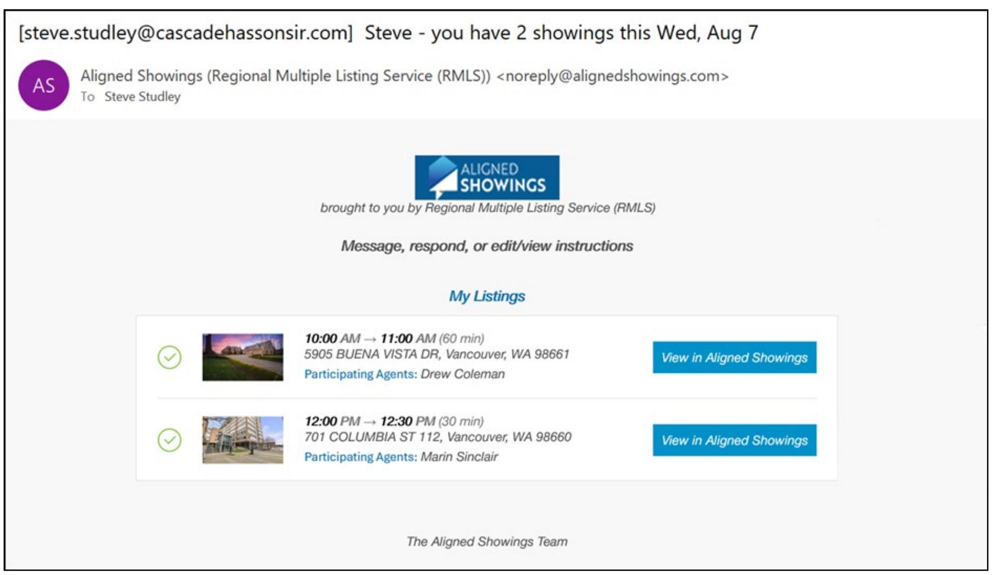
- 297 18TH ST SE, Salem, OR 97301 - 24624150
- Friday, Aug 9th at 2:00 pm

Instructions: Listing agent will accompany, Combo lockbox code (1679)

Participants: Dave Smith
Brokerage: Tradition Real Estate Partners LLC
Phone: (503) 939-7099
Email: dave@traditionrep.com

Additional email notifications are automatically generated in the following instances:

- A daily reminder of upcoming showing appointments is sent if you have showing appointments or showings occurring on your listing


[steve.studley@cascadehassonsir.com] Steve - you have 2 showings this Wed, Aug 7

AS Aligned Showings (Regional Multiple Listing Service (RMLS)) <noreply@alignedshowings.com>
To Steve Studley

ALIGNED SHOWINGS
brought to you by Regional Multiple Listing Service (RMLS)

Message, respond, or edit/view instructions

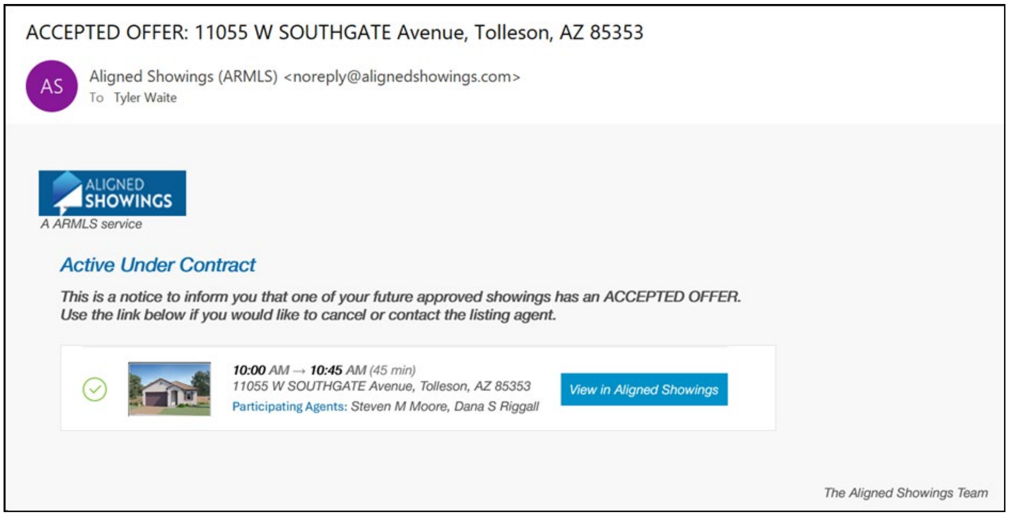
My Listings

10:00 AM → 11:00 AM (60 min)
5905 BUENA VISTA DR, Vancouver, WA 98661
Participating Agents: Drew Coleman
View in Aligned Showings

12:00 PM → 12:30 PM (30 min)
701 COLUMBIA ST 112, Vancouver, WA 98660
Participating Agents: Marin Sinclair
View in Aligned Showings

The Aligned Showings Team

- When an offer is accepted on a listing that has approved showing requests an email is sent to all showing agents with past and future approved showing appointments


ACCEPTED OFFER: 11055 W SOUTHGATE Avenue, Tolleson, AZ 85353

Aligned Showings (ARMLS) <noreply@alignedshowings.com>
To Tyler Waite

ALIGNED SHOWINGS
A ARMLS service

Active Under Contract

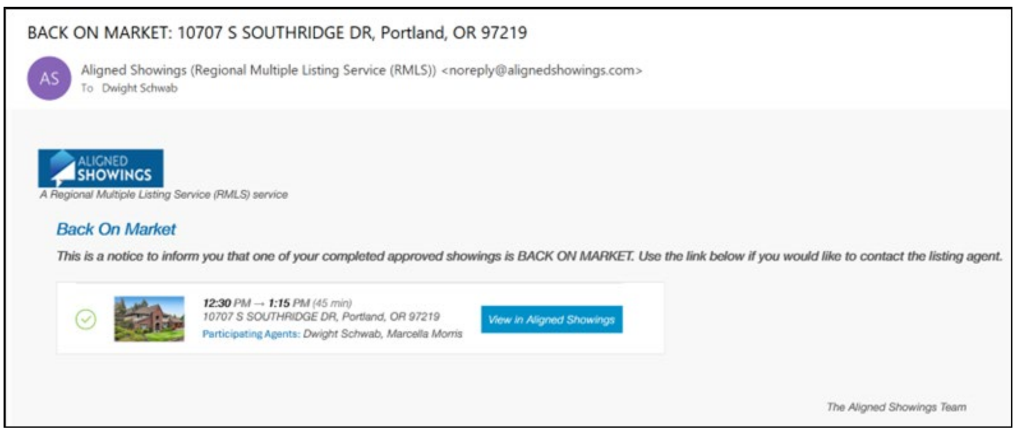
This is a notice to inform you that one of your future approved showings has an ACCEPTED OFFER.
Use the link below if you would like to cancel or contact the listing agent.

10:00 AM → 10:45 AM (45 min)
11055 W SOUTHGATE Avenue, Tolleson, AZ 85353
Participating Agents: Steven M Moore, Dana S Riggall

View in Aligned Showings

The Aligned Showings Team

- When a listing is back on market an email is sent to all showing agents with past and future approved showing appointments


BACK ON MARKET: 10707 S SOUTHRIDGE DR, Portland, OR 97219

Aligned Showings (Regional Multiple Listing Service (RMLS)) <noreply@alignedshowings.com>
To Dwight Schwab

ALIGNED SHOWINGS
A Regional Multiple Listing Service (RMLS) service

Back On Market

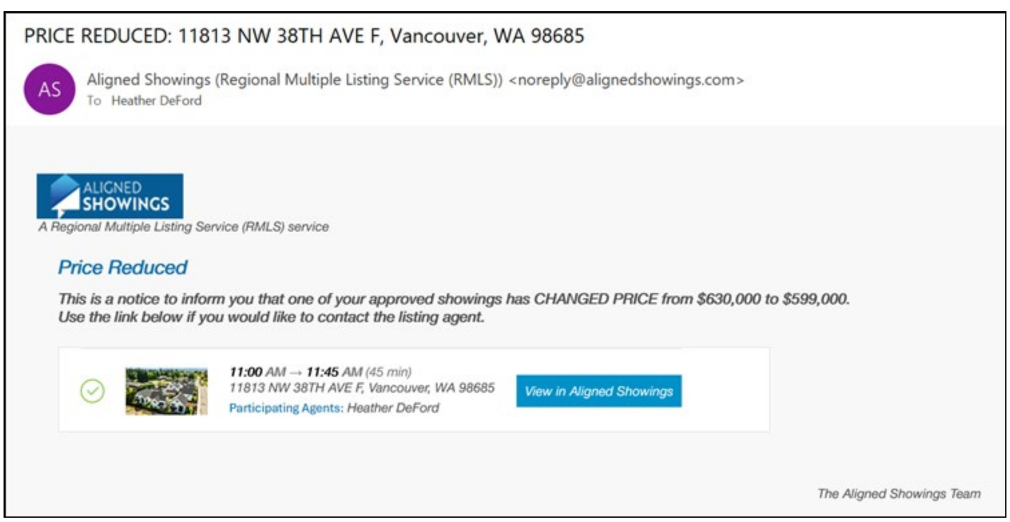
This is a notice to inform you that one of your completed approved showings is BACK ON MARKET. Use the link below if you would like to contact the listing agent.

12:30 PM → 1:15 PM (45 min)
10707 S SOUTHRIDGE DR, Portland, OR 97219
Participating Agents: Dwight Schwab, Marcella Morris

View in Aligned Showings

The Aligned Showings Team

- When the price of a listing is reduced an email is sent to all showing agents with past and future approved showing appointments


PRICE REDUCED: 11813 NW 38TH AVE F, Vancouver, WA 98685

Aligned Showings (Regional Multiple Listing Service (RMLS)) <noreply@alignedshowings.com>
To Heather DeFord

ALIGNED SHOWINGS
A Regional Multiple Listing Service (RMLS) service

Price Reduced

This is a notice to inform you that one of your approved showings has CHANGED PRICE from $630,000 to $599,000.
Use the link below if you would like to contact the listing agent.

11:00 AM → 11:45 AM (45 min)
11813 NW 38TH AVE F, Vancouver, WA 98685
Participating Agents: Heather DeFord

View in Aligned Showings

The Aligned Showings Team

Contacts

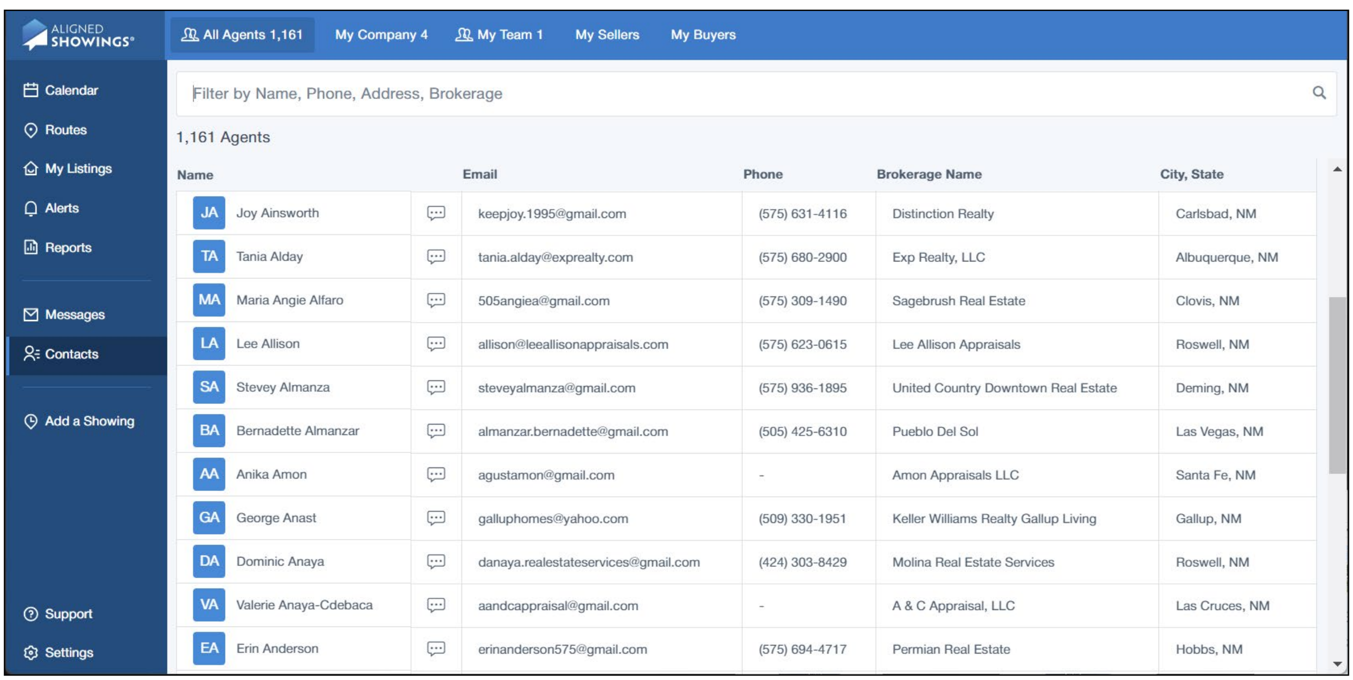
You can quickly find contact information in Aligned Showings for the following:

- **All Agents** - All of the agents in your MLS
- **My Company** - Agents in your real estate office
- **My Team** - Team members that have been added to your listings or showing appointments
- **My Sellers** - Sellers or tenants you have added to your listings
- **My Buyers** - Buyers you have added to your showings or routes
- **My Accounts** - This tab can be enabled by MLSs that have agents that have multiple accounts and allows any users with the same MLSID to work as one.

Note: If the Contacts menu option is not available on your left navigation menu, your MLS has opted out of using this feature. In addition, your MLS may have chosen not to display some columns of information in Contacts.

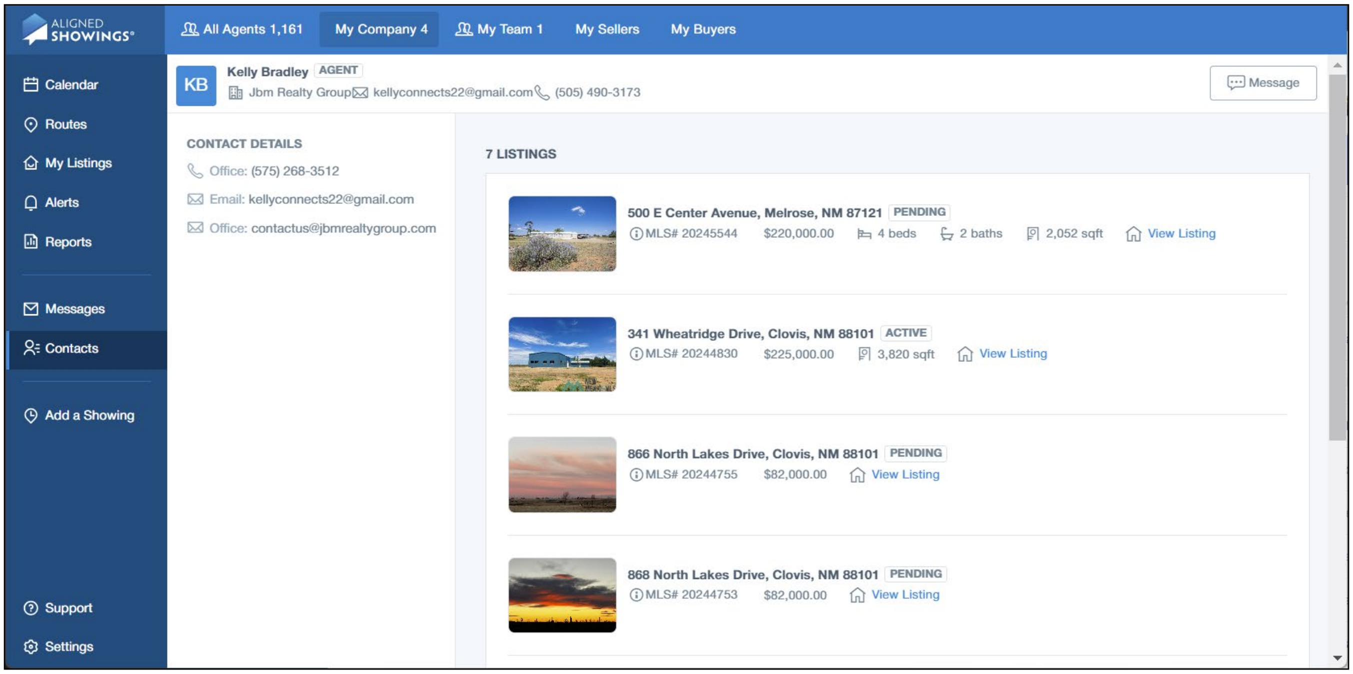
To view agent contact information:

1. Select **CONTACTS** from the navigation menu.
2. Select the **All Agents** tab to view all agents in your MLS, the **My Company** tab to view all agents in your brokerage, **My Team** to view all agents on your team, **My Sellers** to view all the sellers or tenants you have added to your listings, and **My Buyers** to view all of the buyers you have added to your showings or routes.
3. From the list of agents, you can filter by name, phone number, address, or company. You can also click the message icon to send a message to the agent.



4. Select an agent to display more information, including the agent's active and

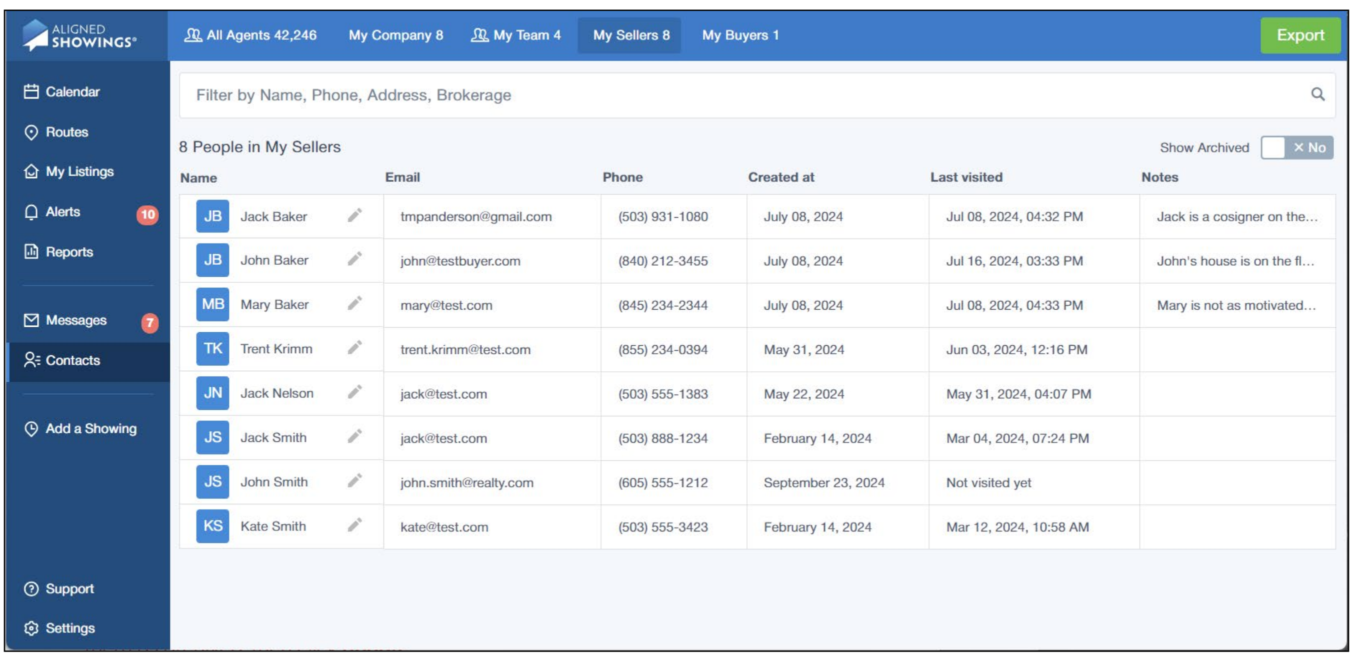
pending listings.



5. Select the **Message** icon in the upper right to send a message to the agent.

To manage seller or buyer information:

1. Select **CONTACTS** from the navigation menu.
2. Select **My Sellers** to view all the sellers or tenants you have added to your listings, and **My Buyers** to view all of the buyers you have added to your showings or routes.



3. Select the **Edit** button on a seller or buyer record to edit their information or mark them as archived, then click **Update**.
4. View archived records by clicking the **Show Archived** toggle.
5. Export a list of your buyers or sellers by clicking the **Export** button.

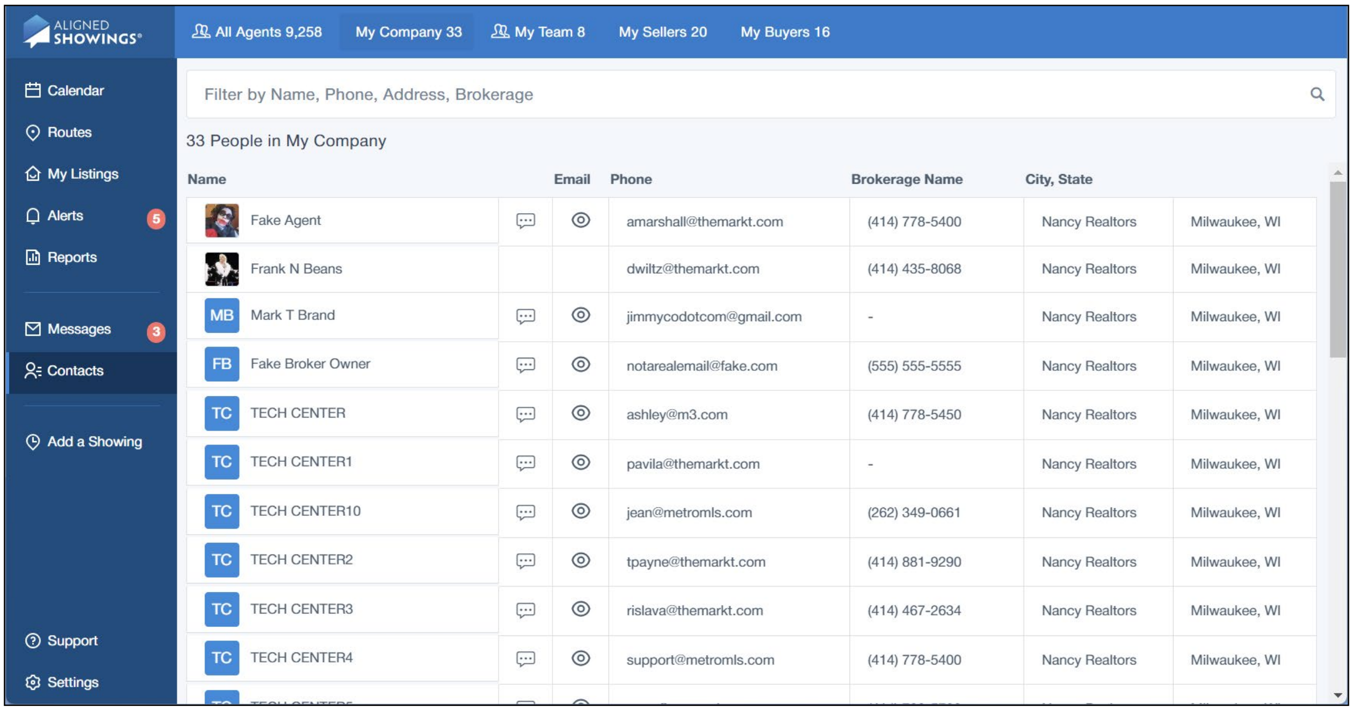
Broker-Level Tasks

If you are a designated broker for your office, you can work as an agent in your office to complete certain tasks. In some markets, broker level logins will also be provided to assistants and managers.

The Broker-level feature allows you to assist agents with managing appointment requests and setting showing preferences for listings.

To work as an agent in your office:

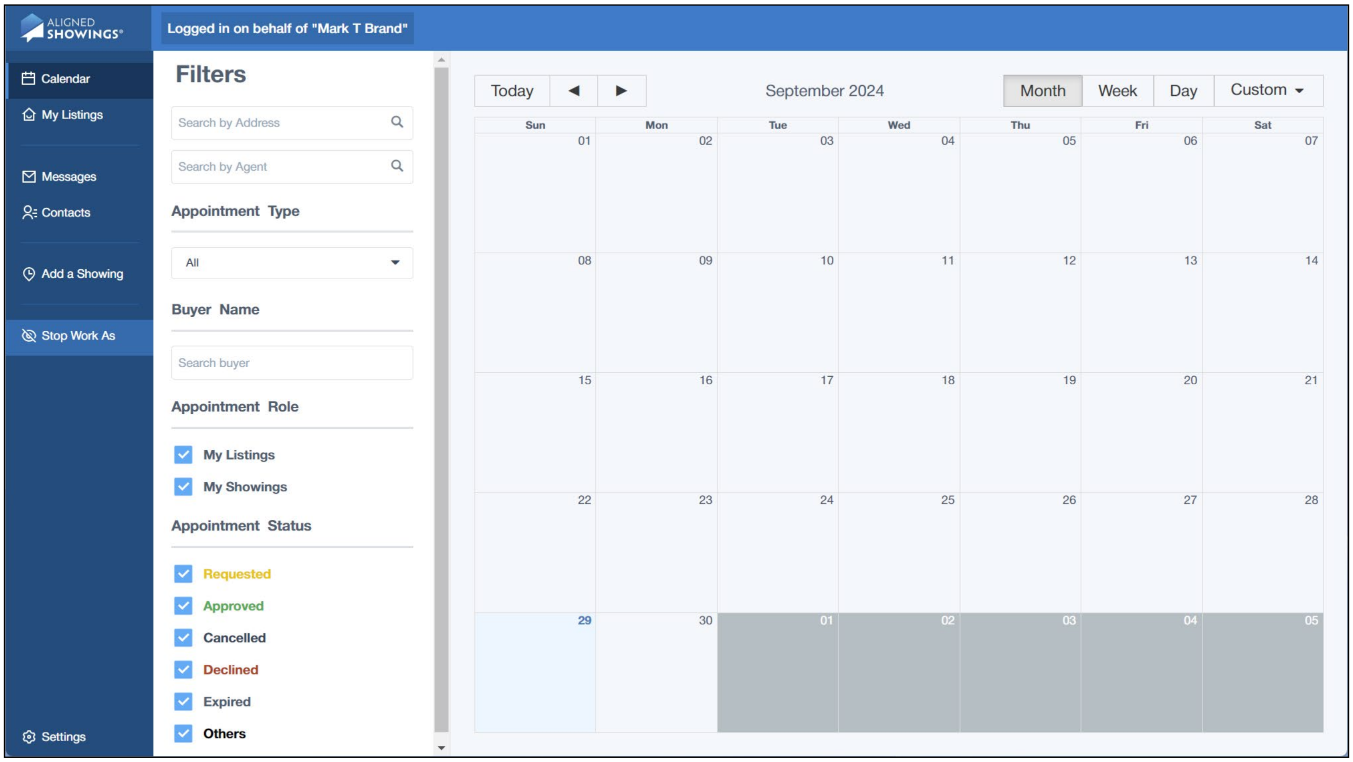
1. Select **CONTACTS** from the navigation menu.
2. Select the **Brokerage** tab to view all agents in your brokerage.



3. Locate the agent you want to login as and select the **EYE** icon.
4. Select **Yes, Work As** to confirm working as the agent.

5. The Dashboard for the agent is displayed.

   Note: The upper left corner displays who you are logged in as.



6. The navigation menu on the left is limited to the tasks you can perform logged in as an agent:
   - **Calendar** - View the agent's showing requests, approve or decline the showing requests, and add team instructions
   - **My Listings** - View the agent's listings and set the listing's showing preferences
   - **Messages** - View messages, approve or decline showing requests, send messages, add team members, and add Team Instructions and Team Notes.
   - **Add a Showing** - Add a showing request
   - **Stop Work As** - log out of the agent's view
7. Select **Stop Work As** to stop impersonating the agent and return to your view.

Buyers

Aligned Showings allows showing agents to add buyers to a showing appointment or a route. Adding a buyer to showings makes it easy to view showing by buyer on the CALENDAR.

Once a buyer is added to an appointment, the buyer information displays in the appointment details and messages, viewable only by the showing team.

When a showing appointment with a buyer name added is approved, the buyer receives an email with a calendar (.ICS) invitation. Note that the listing agent information is not included on the email sent to buyers.

Add a Buyer to a Showing Appointment or Route

To add a buyer to a showing:

1. Select **Add a Showing** from the Aligned Showings navigation menu.
2. Search for and select the listing.
3. Select **Schedule Showing**.
4. Select the desired showing time.
5. Select the showing type and click Next.
6. Select the showing time and duration and click Next.
7. Select **Add Buyer**.
8. Select **New** to add a new buyer, enter the buyer name, contact information, notes and select **Add**.

   Important: Include a buyer email address to have a notification of the showing with a calendar invitation emailed to the buyer when the showing is approved.
9. For an existing buyer, enter the name and choose them from the dropdown list.
10. Select **Add Buyer** again to add an additional buyer.
11. Select **Send** to submit the showing request to the listing team.
12. When the showing is approved an email is sent to the buyer with a calendar invitation.

To add a buyer to a route:

1. Select **ROUTES** from the Aligned Showings navigation menu.
2. Select the **Create New Route** button.
3. Search for and select the listings to include in the route.
4. Select **Add to Route**. The Create Route screen is displayed.
5. Enter a name for your route.
6. Select the showing date.
7. Select the start time for the route.
8. Select **Add Buyer**.

9. Select **New** to add a new buyer, enter the buyer name, contact information, notes and select **Add**.

   Important: Include a buyer email address to have a notification of the showing with a calendar invitation emailed to the buyer when the showing is approved.

10. For an existing buyer, enter the name and choose them from the dropdown list.
11. Select **Add Buyer** again to add an additional buyer.
12. Select **Next**.
13. Select **Create & Schedule Route**.
14. Make any modifications to the route and click **Request Appointments**.
15. When a showing on the route is approved an email is sent to the buyer with a calendar invitation.

View Showings by Buyer

A showing agent can filter the Calendar to display only showings for a specific buyer.

To filter the showings by buyer:

1. Select **Calendar** from the Aligned Showings navigation menu.
2. In the **Filters** section, enter the buyer in the Buyer Name section and select the buyer.

To view buyer information for a showing:

1. Select the appointment in the **Calendar** and select **More Details**.
2. The buyer tile is displayed at the bottom. Hover over it and select **Contact** to display contact information.

View and Manage Buyers

The buyer name, contact information, and notes can be viewed and modified by the showing agent.

To view buyers and modify buyer information:

1. Select **Contacts** from the Aligned Showings navigation menu.
2. Select the **My Buyers** tab.
3. Select a buyer to view or edit any buyer information.
4. Select **Save** if you made any changes.

Note: Depending on the preferences selected by your MLS, listing agents may have the ability to set a listing to require a buyer name be entered for each showing request in the Listing Setup. When a listing requires a buyer name be entered, the listing agent can view buyer information after the listing expires by downloading a buyer report at My Listings. The report is available in the Aligned Showings web application for 5 days after a listing expires.

Sellers

Aligned Showings provides home sellers and tenants with a way to be a part of the showing process. As a listing agent, you can add a seller or tenant to the listing and designate whether they can approve and decline showing requests and view showing feedback.

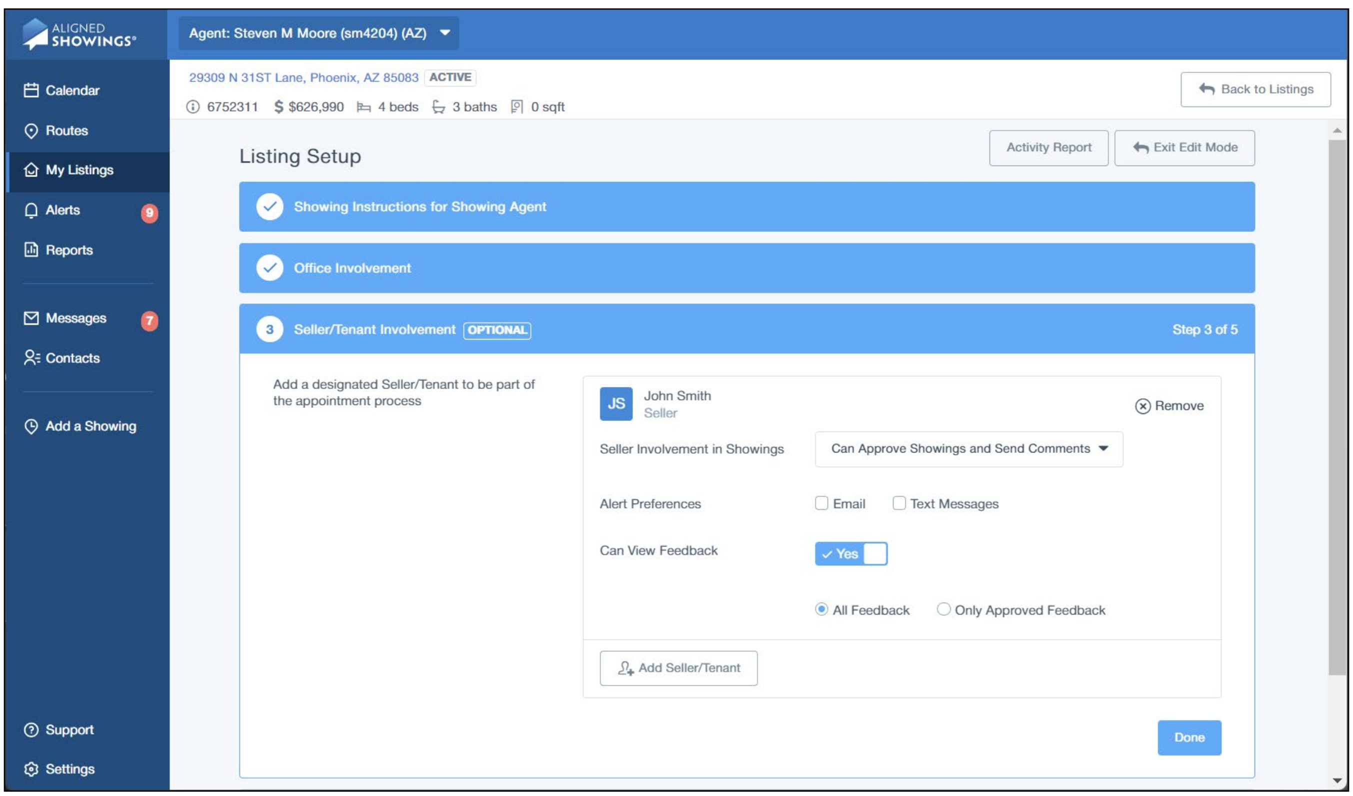
With Aligned Showings, sellers and tenants can:

- Receive showing appointments by email or text message
- Approve or decline showing requests
- View showings included approved, pending, declined, and cancelled appointments
- Add showing appointments to their Google or Outlook calendar
- View showing feedback
- Manage notifications

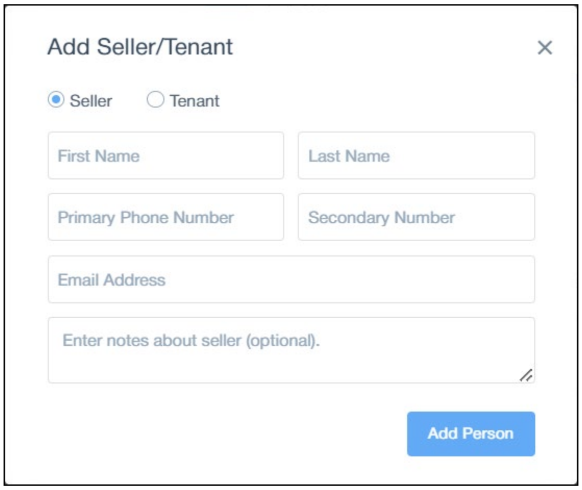
Add a Seller/Tenant to a Listing

To add a seller/tenant to your listing:

1. Select **MY LISTINGS** from the Aligned Showings navigation menu. Your active listings are displayed.
2. Select the **Edit listing setup** icon for the listing.
3. Select the **Seller/Tenant Involvement** section.



4. Select **+ Add** to add a seller/tenant.

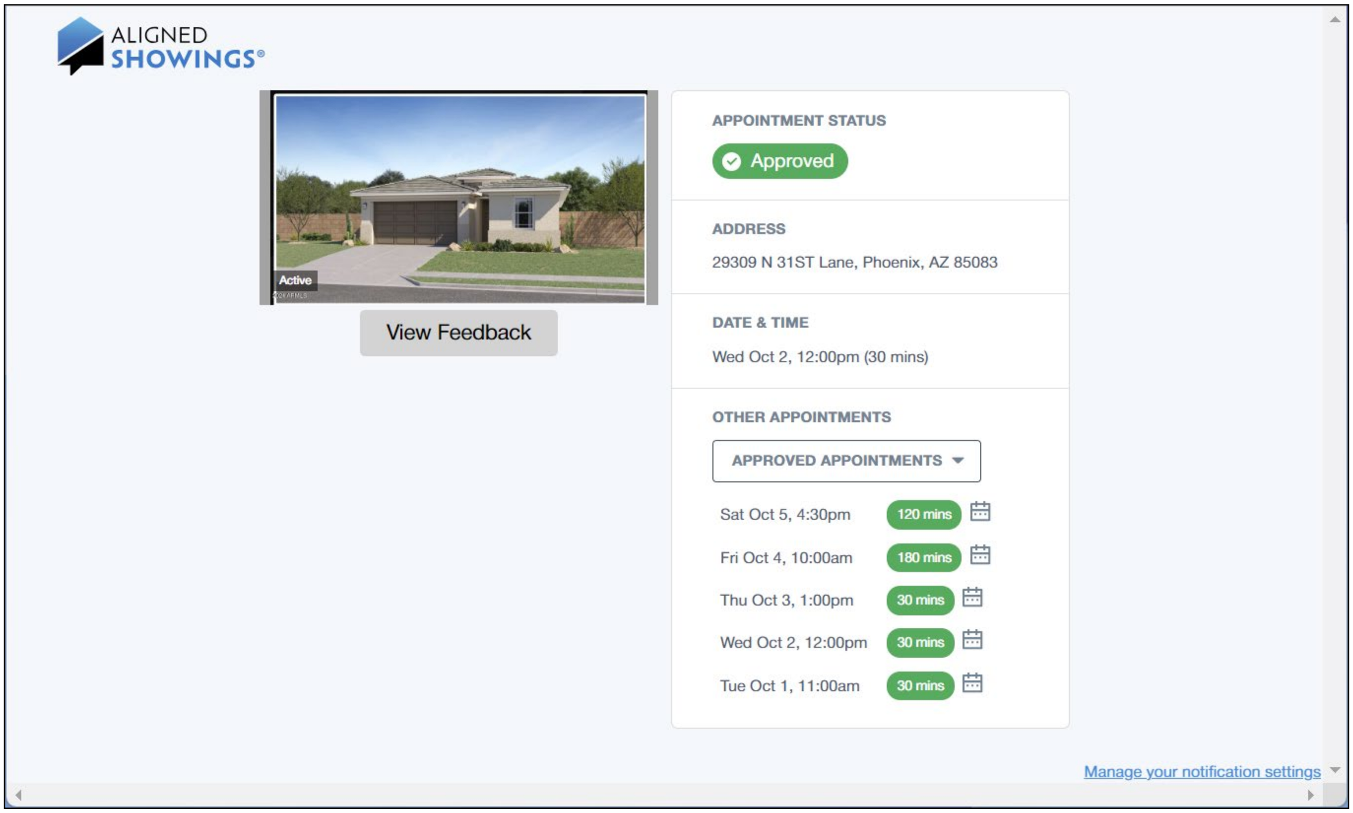


5. Enter the name of the seller or tenant for an existing contact, or select **New** and enter the seller information and select **Next**.
6. Select the level of involvement for the seller/tenant.
   - Select **Can Approve Showings and Send Comments** if you want them to have the ability to approve or decline showings, and be able to include additional comments or instructions.
   - Select **Can Approve Showings with No Comments** if you want them to have the ability to approve or decline showings, but not include additional comments.
   - Select **Notifications Only** if you want them to be able to view showing appointment requests but not approve or decline them.
   - Select **NONE** if you added the seller/tenant for reference only and they will not be able to approve or decline showings.
7. If the seller/tenant is set to approve showings or receive notifications, select if they should receive **Email** and **Text Message** alerts.
8. If you want the seller/tenant to be able to view feedback, enable **Can view feedback**, and then select **All Feedback** or **Only Approved Feedback**. See ***Showing Feedback*** for information on how to approve feedback for the seller/tenant to view when **Only Approved Feedback** is selected.
9. Select **Add** to save the seller/tenant.

Obtain Seller Appointment Link

When a seller/tenant is designated to approve or decline showing requests, they receive an email and/or text message notifying them of the showing request.

When the seller selects the link, the appointment information is displayed including the address, the requested showing time and length of showing, and any approved appointments for the listing. The seller/tenant can approve or decline the showing (if authorized), view feedback (if authorized), and view other appointments for the listing by type including pending, declined, and canceled.



When the seller/tenant approves the showing, they can enter or edit showing instructions if they are set up to approve and send comments. When the seller/tenant declines the showing, they can select the reason the showing request was declined.

The listing agent can send the appointment link to a seller/tenant that cannot locate their link, or paste it into a browser to view what the seller/tenant views.

To obtain the seller/tenant's showing appointment link:

1. Select **Messages** and locate the showing appointment.
2. Select the Seller/Tenant tile and select **Contact**.
3. Select **Copy Seller Appointment** link and then paste it into an email or text message to the seller/tenant.

View and Manage Sellers

The seller/tenant name, contact information, and notes can be viewed and modified by the listing agent.

To view and modify seller/tenant information:

1. Select **Contacts** from the Aligned Showings navigation menu.
2. Select the **My Sellers** tab.
3. Select a seller/tenant to view or edit any information.
4. Select **Save** if you made any changes.

Reports

There are several reports available in Aligned Showings:

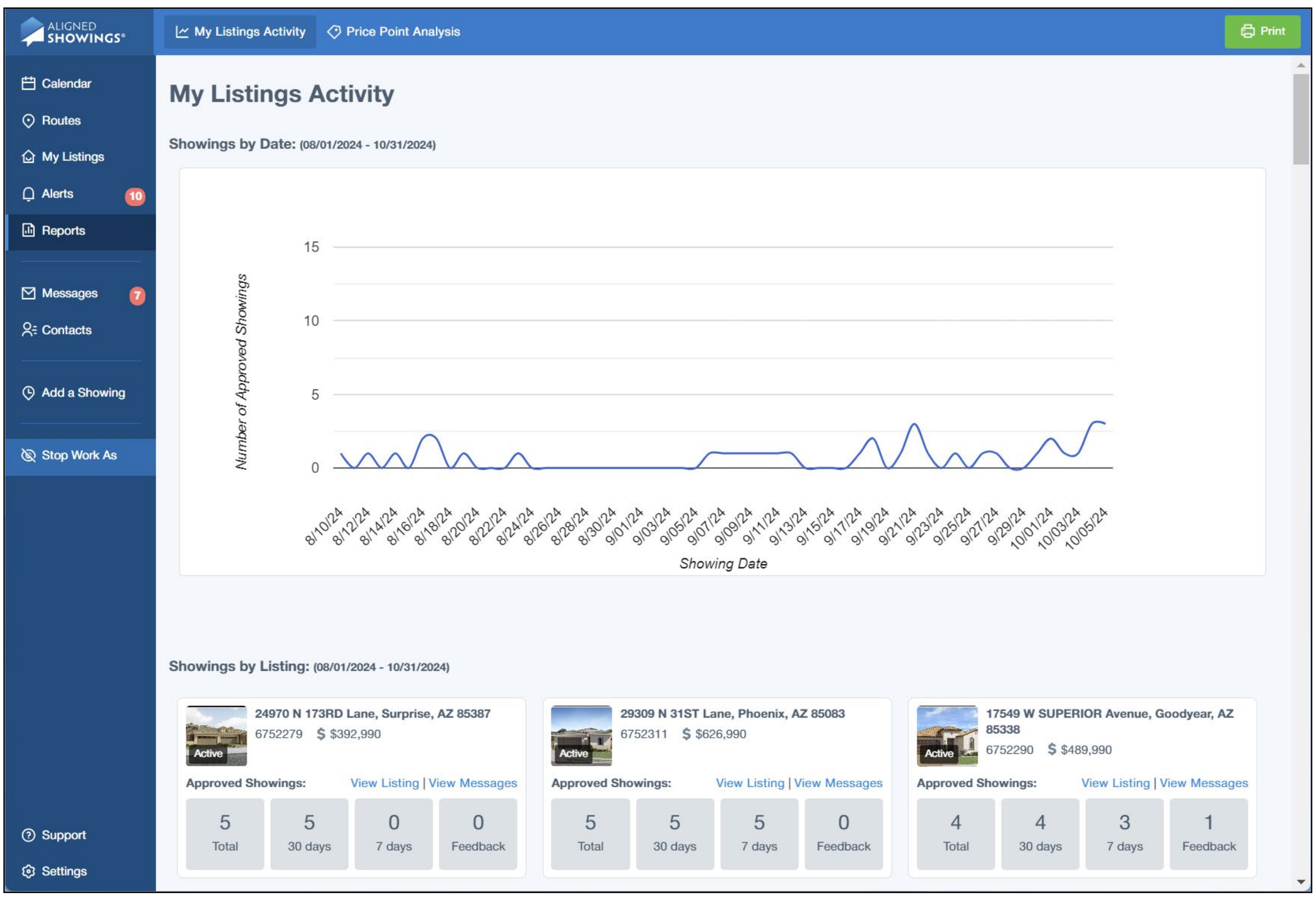
- Listings Activity
- Price Point Analysis Report
- Download Listing Activity

Listings Activity

The Listings Activity displays a 3-month graph of the approved showings for your listings, and the number of showings and feedback for each of your listings.

To view your Listings Activity:

1. Select **REPORTS** from the navigation menu.
2. The graph displays the number of approved showings for your listings for the date range shown.
3. Scroll down to see the number of showings in the 3-month range, the last 30 days, and the last 7 days for each of your listings. The number of feedback responses received for your listings is also displayed.
4. Select the **Print** button to print the report.

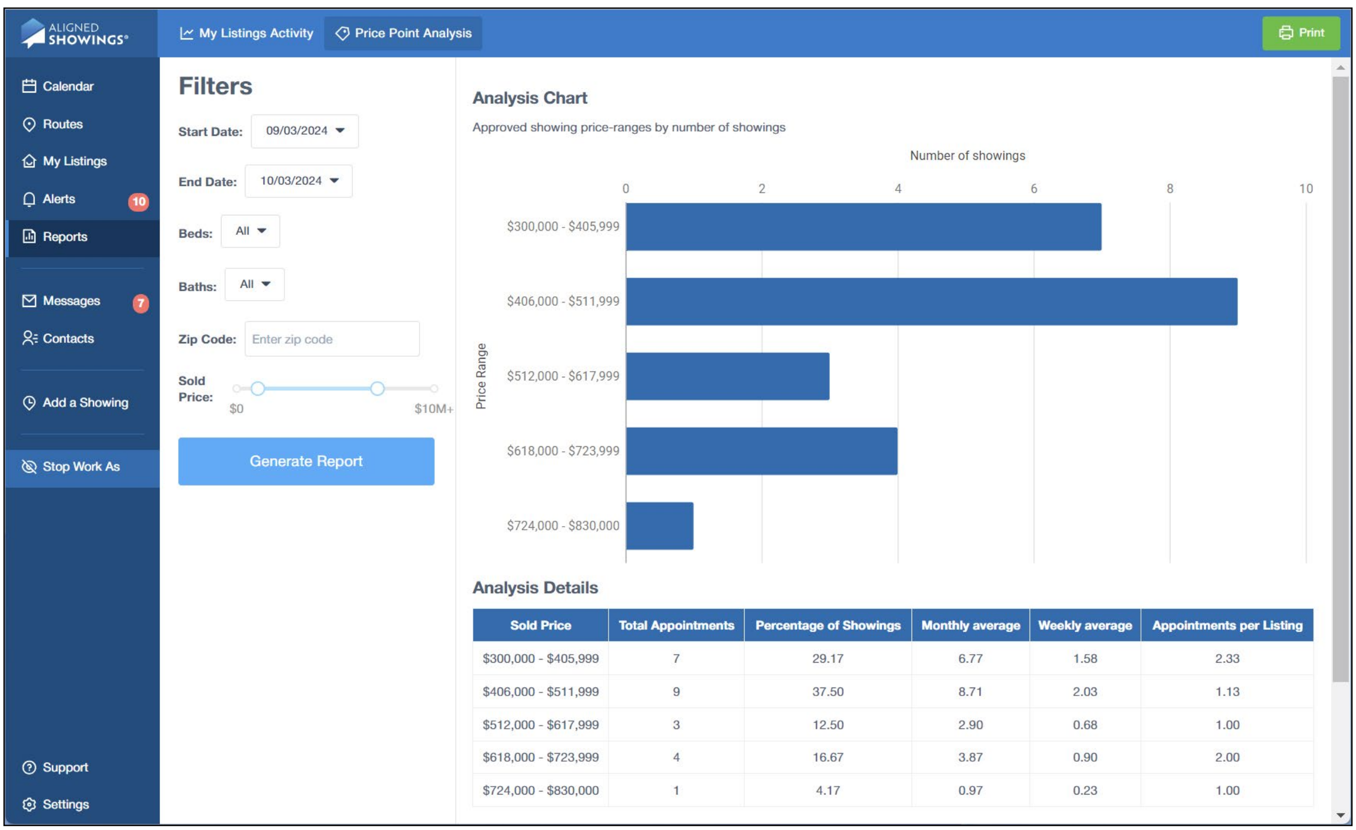


Price Point Analysis

This report provides an analysis of the listing price of approved showings by zip code within the MLS. This indicates the price points where most showings have occurred for a particular timeframe.

To view the Price Point Analysis:

1. Select **REPORTS** from the navigation menu.
2. Select the **Price Point Analysis** tab.
3. Select the state date for the report
4. Select the end date for the report.
5. Select the number of bedrooms.
6. Select the number of bathrooms.
7. Enter the zip code.
8. Select the price range.
9. Select the **Generate Report** to display the report.
10. Select the **Print** button to print the report.



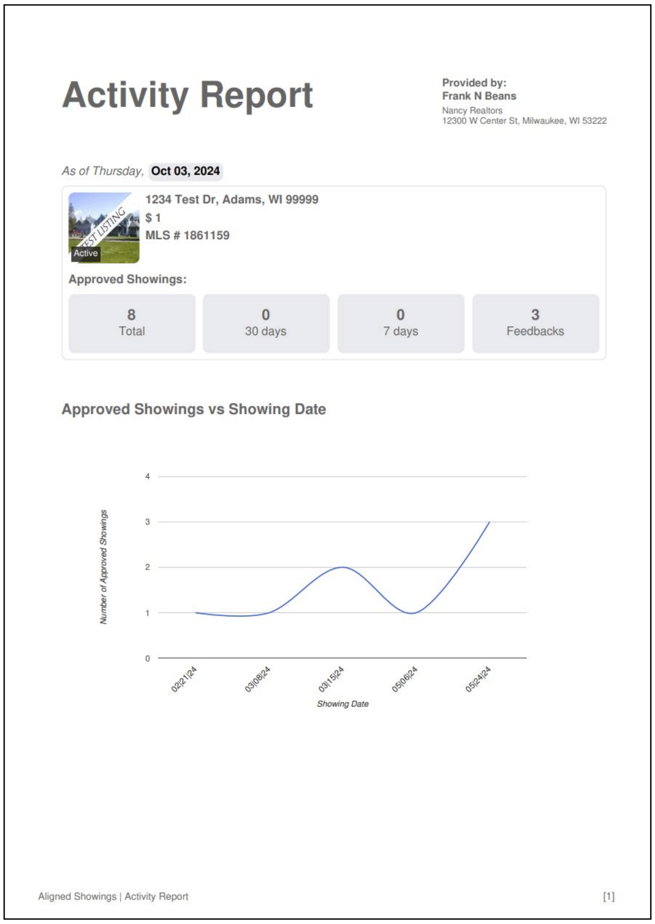
Sold Price	Total Appointments	Percentage of Showings	Monthly average	Weekly average	Appointments per Listing
$300,000 - $405,999	7	29.17	6.77	1.58	2.33
$406,000 - $511,999	9	37.50	8.71	2.03	1.13
$512,000 - $617,999	3	12.50	2.90	0.68	1.00
$618,000 - $723,999	4	16.67	3.87	0.90	2.00
$724,000 - $830,000	1	4.17	0.97	0.23	1.00

Download Activity Report

This report displays a detailed summary of every approved showing appointment as well as any feedback submitted for the listing.

To view the report:

1. Select **MY LISTINGS** from the Aligned Showings navigation menu. Your active listings are displayed.
2. Locate the listing and select the **Download Activity Report** icon.
3. Select whether to generate the report activity for all sellers or a particular seller.
4. Select whether to include the showing agent name/brokerage, the showing agent name/brokerage with phone number, or to exclude showing agent details.
5. Select **Download**.
6. A new tab opens displaying the report. The report can be printed or downloaded.



Activity Report

Provided by:
Frank N Beans
Nancy Realtors
12300 W Center St, Milwaukee, WI 53222

As of Thursday, Oct 03, 2024

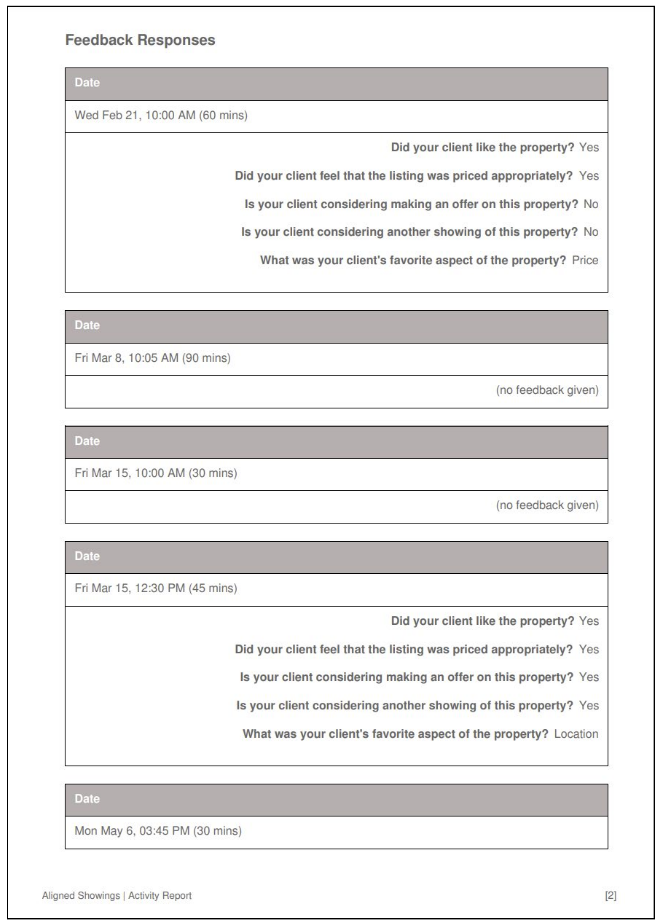
1234 Test Dr, Adams, WI 99999
$ 1
MLS # 1861159

Approved Showings:

8	0	0	3
Total	30 days	7 days	Feedbacks

Approved Showings vs Showing Date

Aligned Showings | Activity Report [1]



Feedback Responses

Date
Wed Feb 21, 10:00 AM (60 mins)
Did your client like the property? Yes Did your client feel that the listing was priced appropriately? Yes Is your client considering making an offer on this property? No Is your client considering another showing of this property? No What was your client's favorite aspect of the property? Price

Date
Fri Mar 8, 10:05 AM (90 mins)
(no feedback given)

Date
Fri Mar 15, 10:00 AM (30 mins)
(no feedback given)

Date
Fri Mar 15, 12:30 PM (45 mins)
Did your client like the property? Yes Did your client feel that the listing was priced appropriately? Yes Is your client considering making an offer on this property? Yes Is your client considering another showing of this property? Yes What was your client's favorite aspect of the property? Location

Date
Mon May 6, 03:45 PM (30 mins)

Aligned Showings | Activity Report [2]

Help

Support for Aligned Showings is provided by your MLS. Please contact your MLS with any questions.