ReboGateway Training - Live Farms

I. What is a **Live Farm**?

    a. A Live Farm is a saved set of properties within ReboGateway that is continuously monitored for new homeowner Life Events that occur within those properties. The User receives a "Daily Notices" Email reporting new activity that has occurred in their active Live Farms.

II. What a **Live Farm** is **not**:

    a. A Live Farm is *not* a 'saved search' that ReboGateway monitors or will notify you on when new records meet your saved search criteria.

III. Things to Note Regarding Live Farms:
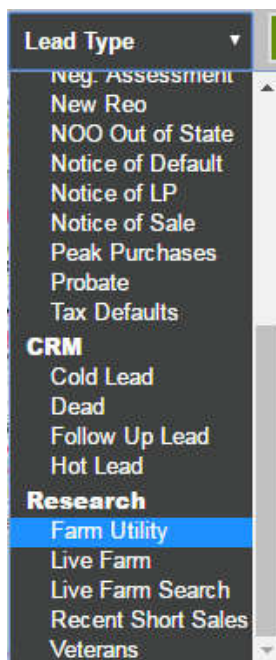
    a. Live Farms can hold up to, but no more than 1,000 properties each

    b. There is no limit to the number of Live Farms you can save in your account

    c. The standard ReboGateway Subscription allows for (8) Live Farms to be "actively" monitored at any one time ("Active" selections can be changed by user at any time)

        i. Additional blocks of (8) 'active' Live Farms can be purchased as a ReboGateway Add-on (Call Customer Service @ 866-887-0206 for details)

IV. **Choosing Properties for a Live Farm:**

    a. The properties for a Live Farm can be selected 'geographically' or 'demographically' (or a combination of both)

        i. *Geographically* – properties are selected based off of an area on the map

        ii. *Demographically* – properties are selected based more off of a set of Filter criteria
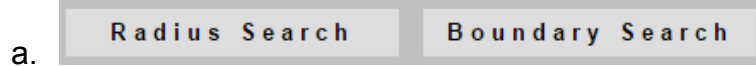
V. **Creating a Live Farm:**

    a. Select **Farm Utility** from **Lead Type** Menu
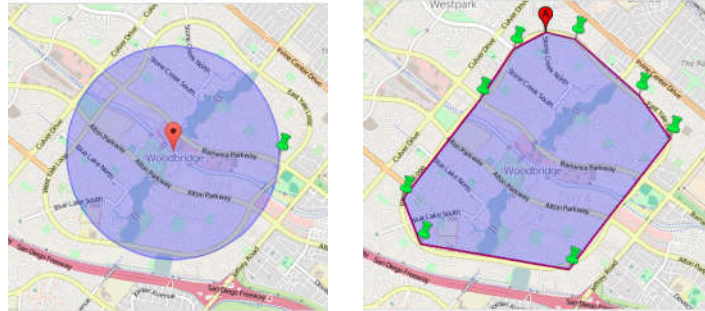

        i.

ii. If selecting properties **geographically**:
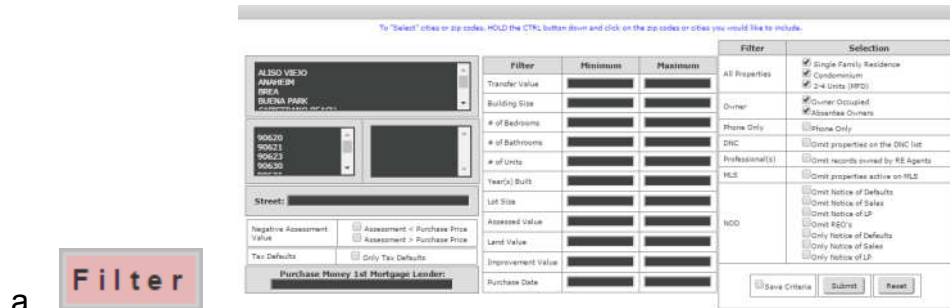
    1. Click on **Radius Search** or **Boundary Search**

        a.

    2. Define the area on the map (radius or boundary) that the Farm Utility will be identifying properties from

        a.

    3. Click on the pink **Filter** Button to denote the criteria you'd like the Farm Utility to use in identifying properties

        a.

    4. Within the Filter check the "Save Criteria" Checkbox then click "Submit"
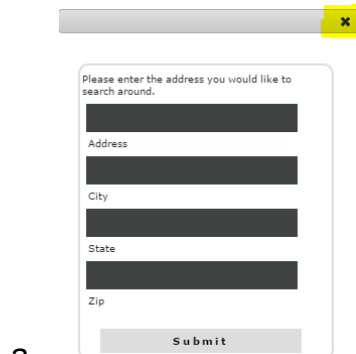
        a.

    5. Adjust Radius size, re-draw boundaries, and/or adjust Filter criteria as needed to identify the desired number of properties

iii. If selecting properties **demographically**:
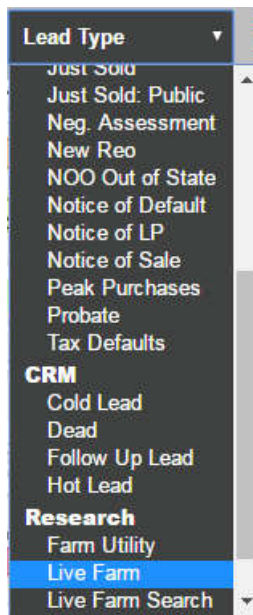
    1. Click on **Radius Search**

        a.

    2. Close out the Address Search Window that pops-up

        a.

3. Click & hold on the green pin on the edge of the circle and drag it right to enlarge the radius to cover the area you choose. Or select the entire county *(it doesn't matter how big the radius is as long as the entire county is within the shaded area)*

a.

4. Click on the pink Filter Button to denote the criteria you'd like the *Farm Utility* to use in identifying properties

a.

5. Within the Filter check the "Save Criteria" Checkbox then click "Submit"

a.

6. Adjust Filter criteria as needed to identify the desired number of properties

b. Click the Save Button under the map

i.

c. Type in the name for the Live Farm and click **Save Farm.**

SAVE TO A NEW FARM

What's the name of your farm?

save farm

i.

d. Wait 3-5 seconds for the Farm to save.

You can locate your farm in "Live Farms" in your Lead Types.

i.

VI. Activating Live Farms and Customizing the 'Daily Notices' Email:

    a. Select **Live Farms** from the **Lead Type** Menu

        i.

    b. Click on the **Manage** Button [Manage]

        i. **'Control Panel to Specify Daily Notices'**

           1.

           2. **ACTIVE**- a checked box means the Farm is being monitored

           3. **NAME**- here you can change the name of the Farm

           4. **DAYS**- this is the number of days past from today that the system will include in its reporting of new life events in the Daily Notices Email

           5. **EVENTS**- a checked box under the Event means that the system will include notifications of these in the Daily Notices. Hovering your curser over the abbreviation of the Event will show you the full title.

               a. **MLS Events** (MLS Listed, MLS Sold, MLS Off)

                  i. **MLS LISTED** and **MLS SOLD** = "informational"

                  ii. **MLS OFF** = 'Expireds' fall under this notification category

           6. **#** (red numbers)- This is the number of properties in the Farm

           7. **DEL**- A checked box mean the Farm will be deleted when Submit is clicked.

           8. **REGENERATE DAILY NOTICES**- This button allows you to generate the Daily Notice for the Active Farms.

           9. **SUBMIT**- Saves changes made in the Control Panel

VII. "Daily Notices" Email:

a.

b. If you have at least one Live Farm 'active' you will receive a daily email titled "**Daily Notice – [date]**"

c. The email will list each of your 'active' Live farms in **bold** and any new events you chose to be notified on will be listed under it's respective Live Farm.

d. *More Info* Link – Clicking the *More Info* Link will cause an internet browser window to open and you will be taken directly to that property record in ReboGateway.

e. **Managing Live Farm Leads** – after clicking *More Info* link from the email:

   i. Click the icon to add the record to a new list (i.e. – "*Farm Divorces*")

   ii. Click the icon to add (append) the record to an existing

   iii. Click the icon to categorize the lead status (hot/cold/dead), make a note, and/or schedule a follow-up task (Call Back/Mail Que/Door Knock)

VIII. Live Farm Search:

a. Select **Live Farm Search** from the Lead Types Menu

b. Allows user to enter a date range and search all active Live Farms for Life Events that occurred within that date range.

   i. **Live Farm Search** will search within Live Farms that are currently checked as "active" in the *Daily Notices Control Panel* (via **Lead Types→Live Farms→Manage**)

   ii. **Live Farm Search** will report only the notification categories that you have checked within each Live Farm in the *Daily Notices Control Panel* (via **Lead Types→Live Farms→Manage**)