Touchbase
REAL ESTATE

Customize your settings in Touchbase

*The above is an image of our app, as displayed on a tablet.
You can see the smartphone version at the top of the page.*
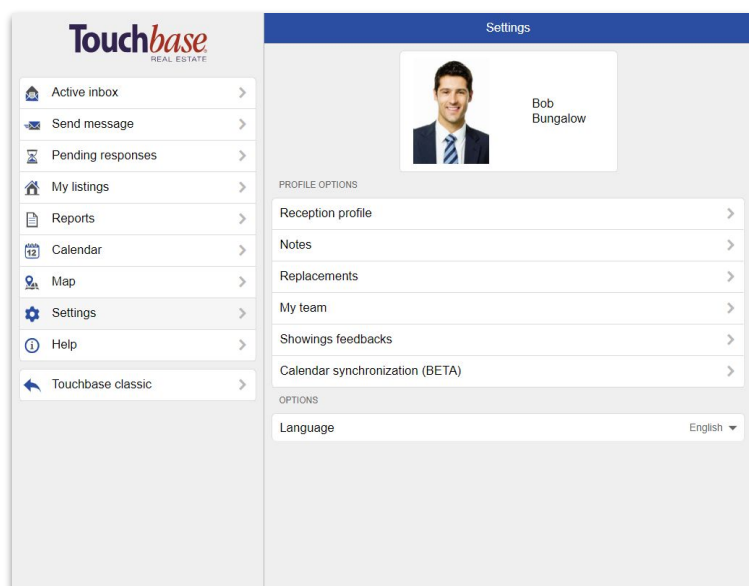
Step 1. Download the **Touchbase SM2** app on your smartphone from the App Store or Google Play (if you have not already done so).

How to customize your settings in Touchbase

Step 2. Customize your profile.

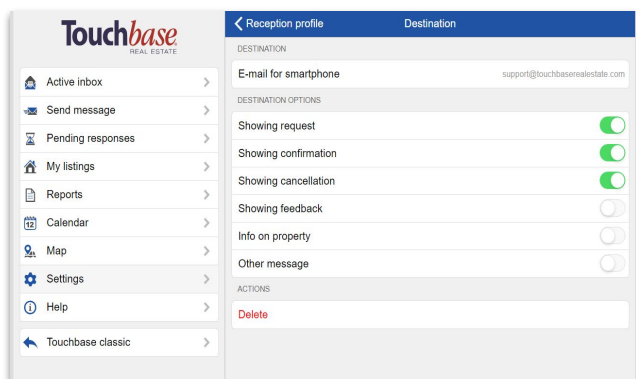### A. Adding your email and phone number

✅ In the app's main menu, select **Settings > Reception Profile**.

> ACTIONS
> Add e-mail   >
> Add an SMS   >
> Add a pager   >

✅ In the **Actions** section, add your email address or mobile number. These are called **Destinations**.

✅ When you add a Destination, you will see it listed in the **Destinations section**.

> DESTINATIONS
> E-mail for smartphone   support@touchbaserealestate.com >

*Example: I want to receive all my **Showing requests, Confirmations and Cancellations by email,** but I don't want to receive any other type of message by email.*

B. Customizing the way you receive messages

✅ Click the **Destination** you want to customize.

✅ **Select the types of messages** you want to receive on that Destination. Deselect any message types you wish to receive on a different Destination.

✅ It is important to note that **every message type must be checked off** on at least one Destination in order for your profile to remain active. For example, if you deselect 'Other message' on your email, you will need to make sure it is selected on mobile.

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## Customize your settings in Touchbase

USER NOTES

*There are a few places where you can add notes. These notes will appear when someone pulls up your name in Touchbase or your MLS. User Notes are notes **related to you**, as opposed to Listing Notes, which you can set up for each of your listings.*

A. Creating user notes

- ✅ In the app's main menu, select **Settings > User notes**.

- ✅ Click on **Add a note** and write your message. Make sure to click **Save**.

B. Customizing user notes

- ✅ Under **Type of note**, choose to make notes visible to all agents, or visible only to those in your office.

- ✅ Under **Covering period**, choose to show the note either **all the time** or **only during certain periods**, dates or times. For example, from June 1st to June 30th.

- ✅ Under **Filtering**, you can choose specific days and times for your notes to display. For example, every Wednesday from noon to 4:00 p.m.
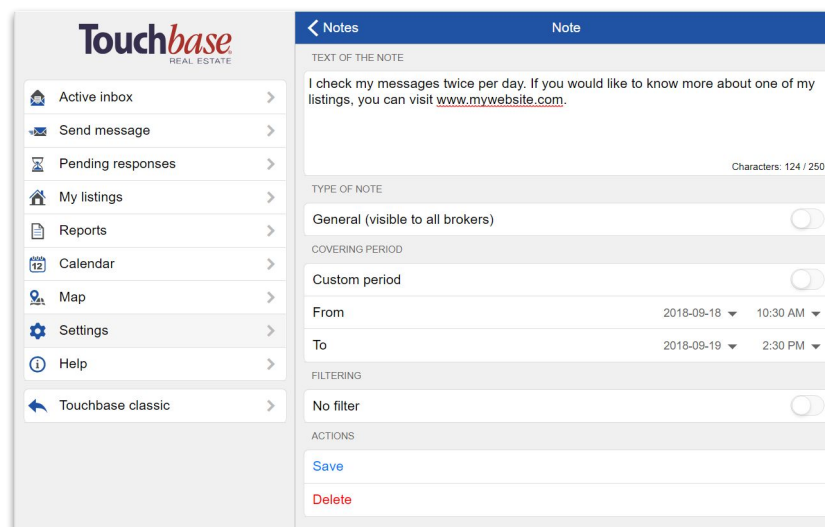
Don't hesitate to contact our support team if you have any questions at support@touchbaserealestate.com or 1 (800) 469-1664.