



# ON-the-GO Walking Farm<sup>®</sup> Tutorial

Including "Walking Farm" Prospecting and Property Data Capabilities



## Walking Farm



Available for **Apple®** and **Android™**

Walking Farm is a module in the existing Find a Farm feature. No need to download another app! You can access it from the Farm Report options screen as an option along with Labels and CSV.



### Features

Create a **Walk Order**—designate a path from start to finish on the map, which will order the farm list.

Since Walking Farm is **integrated into your Profile App**, you can **instantly pull full Property Profiles** directly from any Farm Record.

**Automated Farm Alerts** keep you informed of changes to your saved farms **via email or push notification** to your device.

Multiple Ways to **View Your Farm Area**:

#### List view

- Quick snapshot of properties in the farm, including: Number of Beds/Baths, Square Footage, Owner Name and Mailing Address.
- Swipe to remove properties from the list—“home” icon indicates Status Type. Tap to easily change the status, and indicate which properties have been visited!
- Tap a record to open the property **Detail View**.

#### Map View

- Map pins indicate critical details of your farm: Toggle between map pins to represent different **Status Types** available.
- **Draw Walk Order** allows you to draw a path around your farm, and order it as you plan to walk it.

#### Property Detail View

- Records Show:
 

<input checked="" type="checkbox"/> Number of Beds & Baths	<input checked="" type="checkbox"/> Last Sales Price, Date & Document Number
<input checked="" type="checkbox"/> Square Footage & Lot Size	<input checked="" type="checkbox"/> Assessed & Improvement Values
<input checked="" type="checkbox"/> Pool	<input checked="" type="checkbox"/> Zoning Information
	<input checked="" type="checkbox"/> Owner Mailing Address
- **Edit** any part of the record to reflect current, accurate information.
- Each record contains an area for **note-taking**.
- Pull the full **Property Profile** with one easy click.
- Update the **Status** to help you remember which properties have been visited or which properties require a follow-up!

#### PDF Export

PDF for easy printing and note-taking, includes check-boxes to indicate Status.

#### CSV (Spreadsheet) Export

Updated to include any notes created for each property, as well as status and any changes made to the property record.

**Note** — This update will require users complete their contact information which is added to emails they send from the app as a “Signature.” Users will not need to sign-in again.

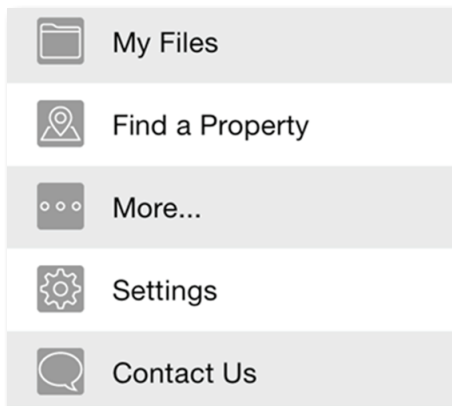
## Find a Farm

Create an area by drawing on the map

Narrow and refine your area with optional **Filters**:

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Sale/Transfer Start and End Date | <input checked="" type="checkbox"/> Seasonal, Vacation Residence                          |
| <input checked="" type="checkbox"/> Use Code                         | <input checked="" type="checkbox"/> Zero Lot Line   |
| <input checked="" type="checkbox"/> Single Family Residential        | <input checked="" type="checkbox"/> Patio Home  |
| <input checked="" type="checkbox"/> Residential Vacant Land          | <input checked="" type="checkbox"/> Cooperative   |
| <input checked="" type="checkbox"/> Condominium Unit                 | <input checked="" type="checkbox"/> No. of Bedrooms                                       |
| <input checked="" type="checkbox"/> Mobile/Manufactured Home         | <input checked="" type="checkbox"/> No. of Bathrooms                                      |
| <input checked="" type="checkbox"/> Townhouse/Rowhouse               | <input checked="" type="checkbox"/> Owner Mailing Address                                 |
| <input checked="" type="checkbox"/> Duplex, Triplex or Fourplex      | <input checked="" type="checkbox"/> Sale Type: Full/Partial/Undisclosed<br>REO In/REO Out |
| <input checked="" type="checkbox"/> Multi-Family                     |   |

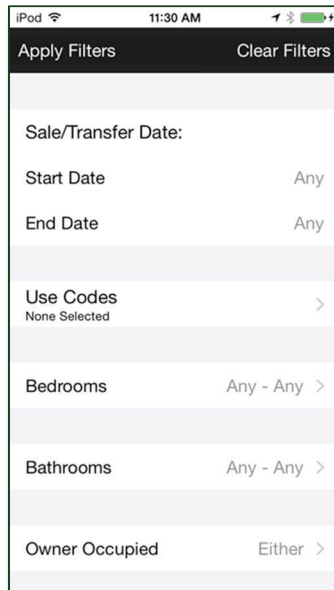
- **Record Count** also automatically generates a **Turnover Rate** - *Turnover rate is based on full transfers in the area selected and recorded in the previous 12 months.*
- **Save** your farm to refer back to it—saved farms include creation date, number of records, turnover rate, and snapshot of the area on a map.
- **Export** your farm as Avery 5160 mailing labels or a spreadsheet of complete farm data.
- **Access Farm** from the “**More...**” button on the home screen and select “**Neighborhood Farm.**”



**Create** an area by drawing a polygon on the map.



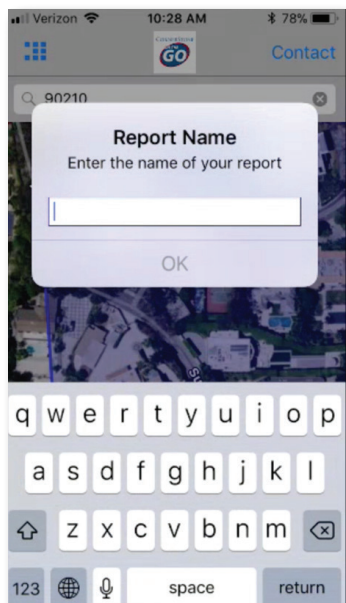
**Narrow and refine** your area with optional **Filters**.



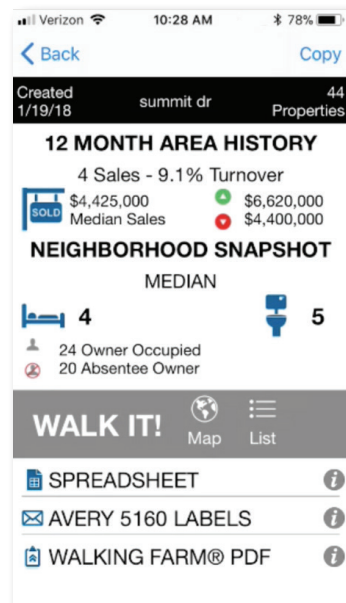
**Record Count** also automatically generates a **Turnover Rate**.



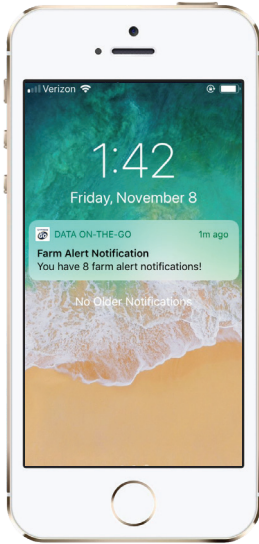
**Save** your farm to refer back to it.



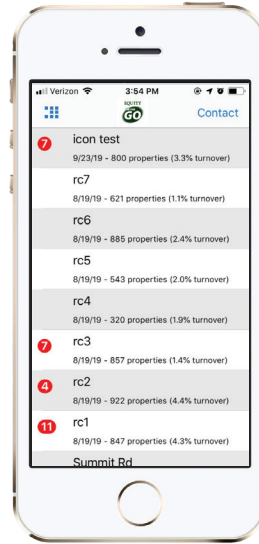
**Export** your farm as Avery 5160 mailing labels or a spreadsheet of complete farm data.



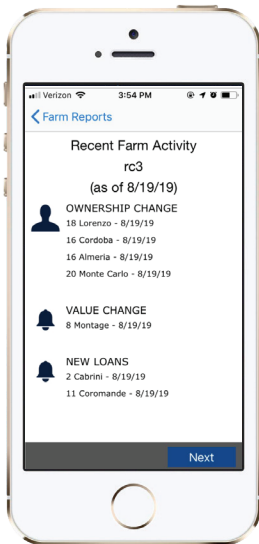
## Automated Farm Alerts!



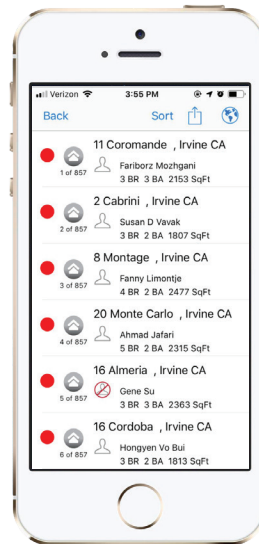
When a Walking Farm is saved, it is **automatically subscribed** to Farm Alerts. The properties in this farm will be checked for updates and **an alert will be sent** twice a month to your device via push notification and email.



Tap the **push notification** to launch the app and see your **list of saved farms**. Saved farms with unread alerts have a **red badge** and number indicating the number of properties with unread alerts.

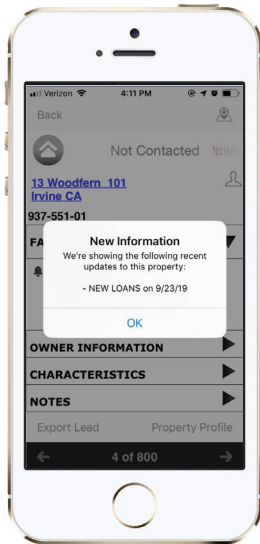


When a farm with unread alerts is opened for the first time, a **summary view** of the alerts will be displayed.

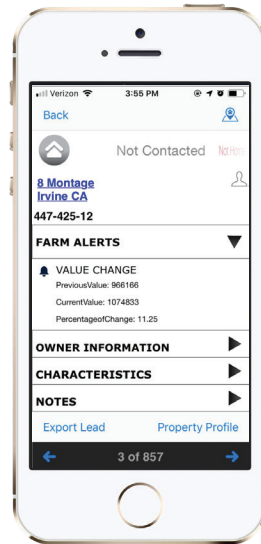


In the **Farm Report**, open the **list of properties** in that farm. Properties with unread alerts will have a **red badge** next to them. On iOS, you can sort the property list by unread alerts.

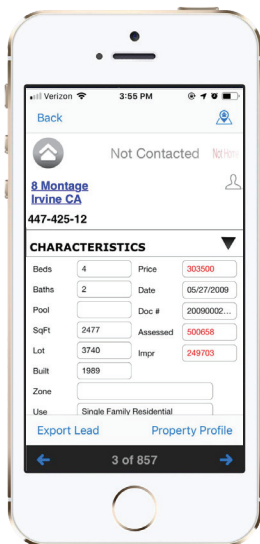
## Automated Farm Alerts! (cont.)



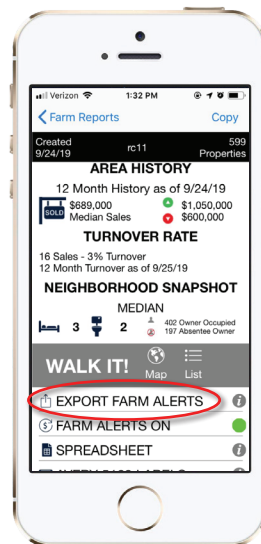
A property detail with unread Farm Alerts will display a dialog box with a **summary of the new alerts** for this property.



All alerts for a property can be viewed by opening the **Farm Alerts** section of the property detail view.



If the property data has **changed**, those fields will appear in **red text**. This updated data is saved to the property detail and **overwrites** the previous values.



Tap “Export Farm Alerts” from the main **Farm Report** view to generate a **CSV** file of the Farm Alerts for the properties in this report.

Refer to Pages 13 or 21 for managing Farm Alert Settings.

## **Walking Farm**

### **APPLE® DEVICES**

#### **Step 1: Create an Area to Farm**

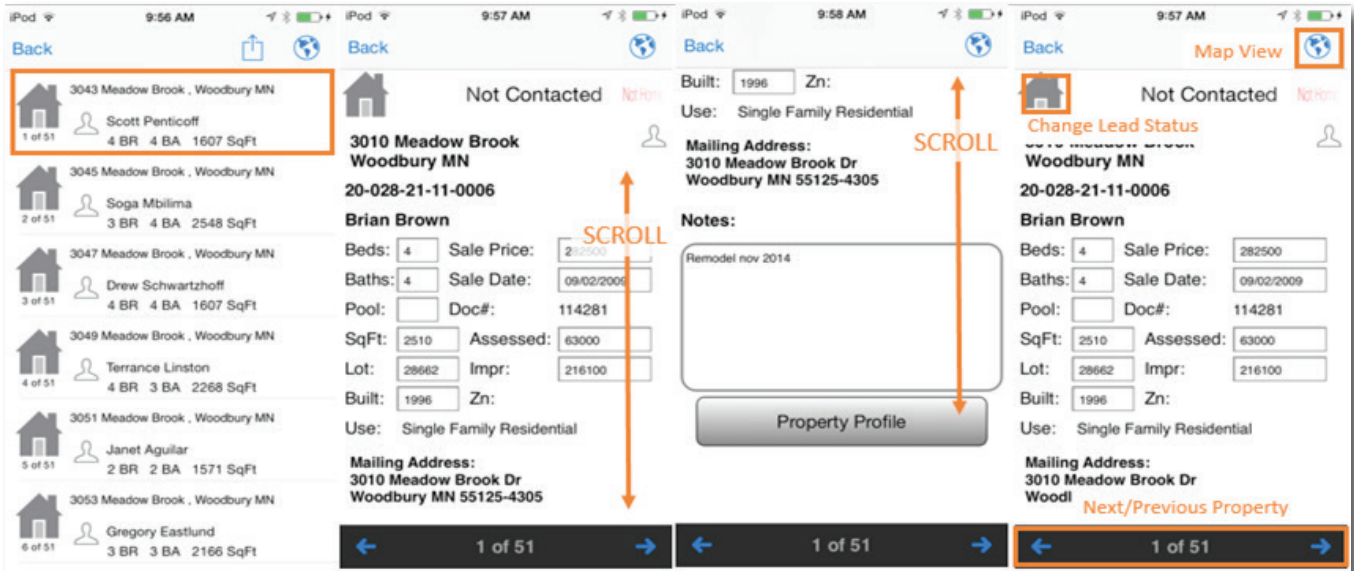
From the Home Screen of the application select **More...**

1. Select **Neighborhood Farm**.
2. Select **Find a Farm Area**.
3. Locate an area on the map you wish to farm.
  - Drag your finger on the map to move the map, pinch in/out to zoom in/out, or
  - Search by city/state/zip using the search bar at the top of the screen.
4. Select the **Draw Icon (polygon, square, rectangle)** at the lower-left of the screen.
  - Tap to drop connecting points on the map around your farm area.
  - Close your shape by clicking on the first point.
  - Select **Apply** in the upper-left corner.
5. To apply filter criteria, select the **Filter Icon**, make your selections and click **Apply Filter**.
6. Select **Get Report Count** from the bottom navigation.
  - You will receive the property count and turnover rate.
7. Select **Get Report**.
8. Type a name for your farm area and select **OK**.



## **Walking Farm (cont.)**

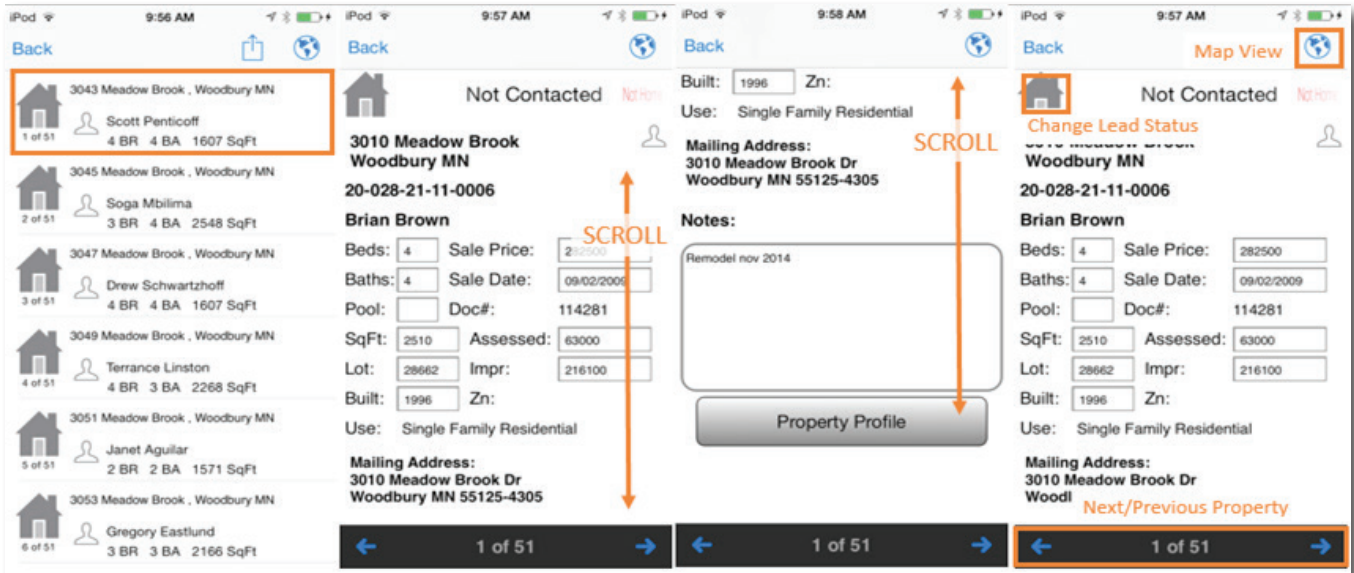
### Step 2: Designate a Walk Order



1. From the report options screen, select **Walking Farm**.
2. Select the **Map Icon** in the upper-right corner.
3. Default view is Owner Occupied status, or toggle between different status types available.
4. Select **Draw Walk Order**.
5. **Drag your finger** on the map across the pins to draw the order you wish to walk the neighborhood.
  - Create your order across all properties or just a section you wish to walk that day.
  - Select **Done** to apply the walk order.
  - Select the first pin in your order and **tap the address flag** to begin walking, or tap the **Back** button on your device to return to the list view and select the first property.

## Walking Farm (cont.)

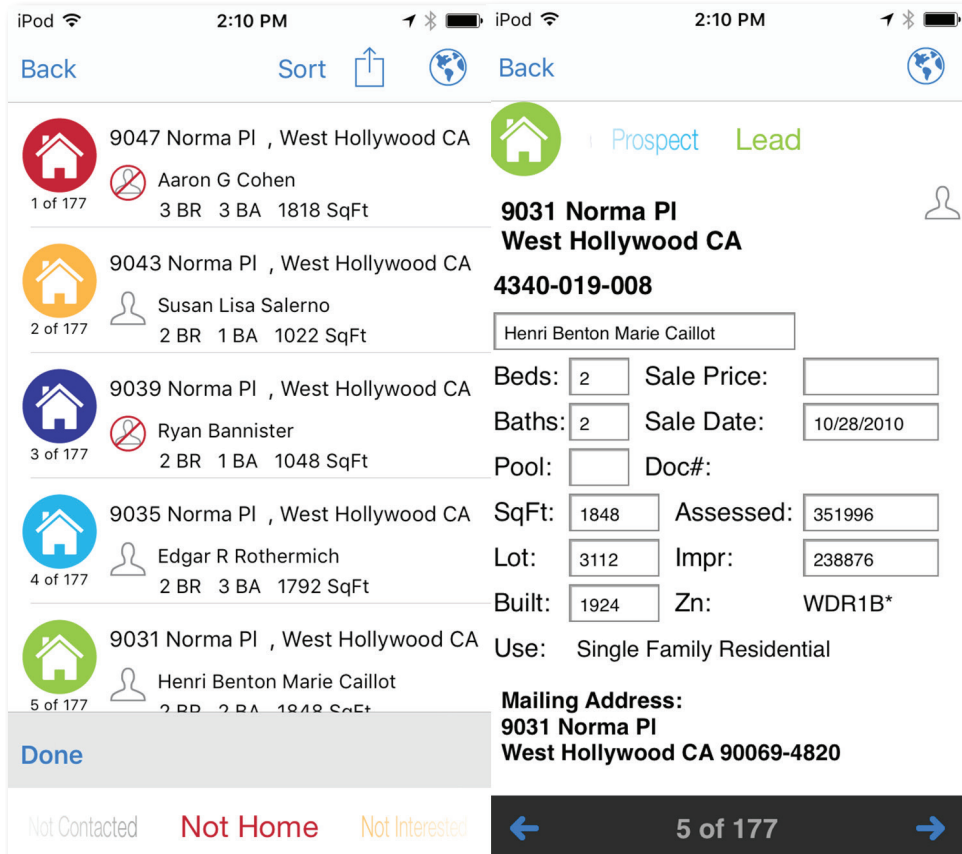
### Step 3: Walking Your Farm



1. In **Step 5** from the previous page (**Designate a Walk Order**), you should have selected a property in your farm to open.
2. To change property details, simply tap on the text field. Changes are auto-saved on entry.
3. Navigation:
  - **Globe Icon** in the upper-right shows you the subject property on a map.
  - **House Icon** allows you to change the different status types available of the property.
4. Scroll to the bottom of the detail view to see:
  - An area for **notes** which auto-saves on entry.
  - A button to request a **Property Profile** report.
  - Navigation to go to the **next** and **previous** properties in the list.

## **Walking Farm (cont.)**

### About the Property Status



**Status** was designed to provide a way to indicate properties you have visited, ones you may need to return back to, as well as other status types.

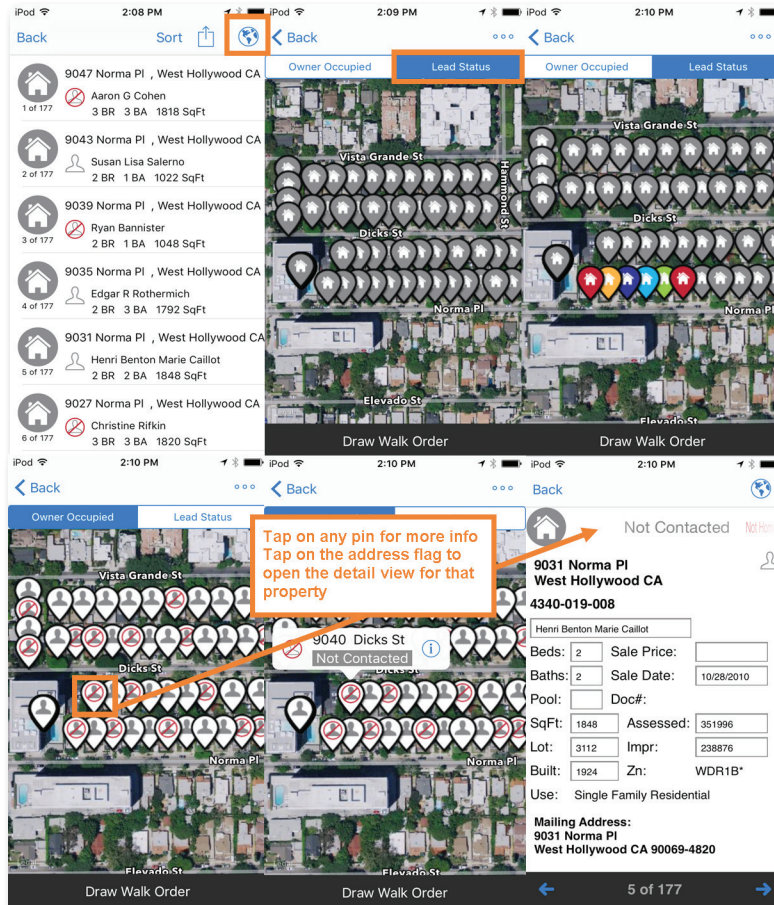
The “default status” is **Not Contacted** for all properties.

There are two ways to update the **Status**:

- 1. List View:** Tap the **House Icon** and select the status at the bottom of the screen.
- 2. Detail View:** Tap the **House Icon** and select the status.

## **Walking Farm (cont.)**

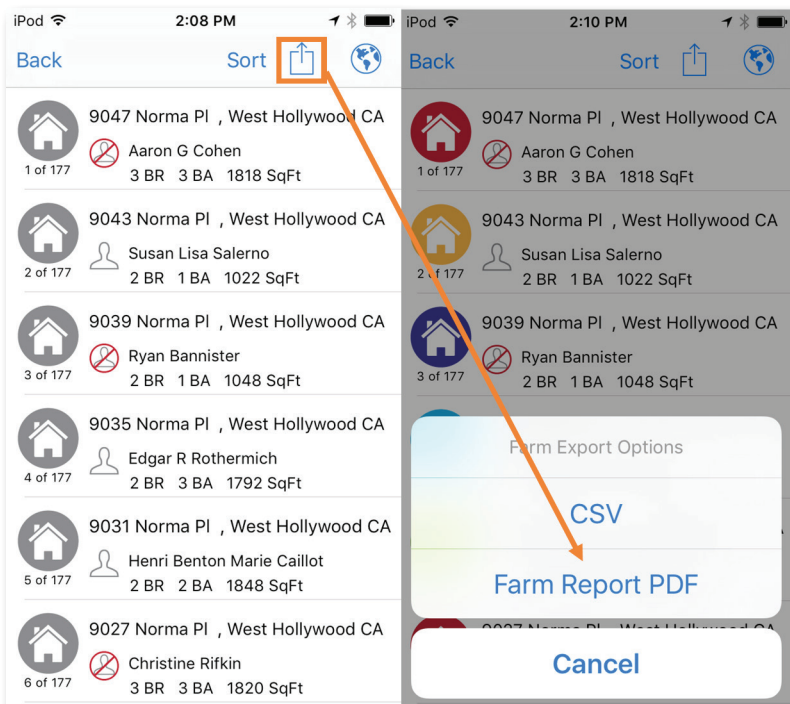
### Using the Map View



1. Select the **Map Icon** in the upper-right corner of the **Walking Farm** list view.
2. By default, the map shows the **Owner Address**.
3. Toggle between different status types available using the top buttons.
4. Return to the list view by selecting the **Back** button.
5. Open the **Detail View** on any property by tapping on the **pin**, and then tapping on the **address flag**.

## **Walking Farm (cont.)**

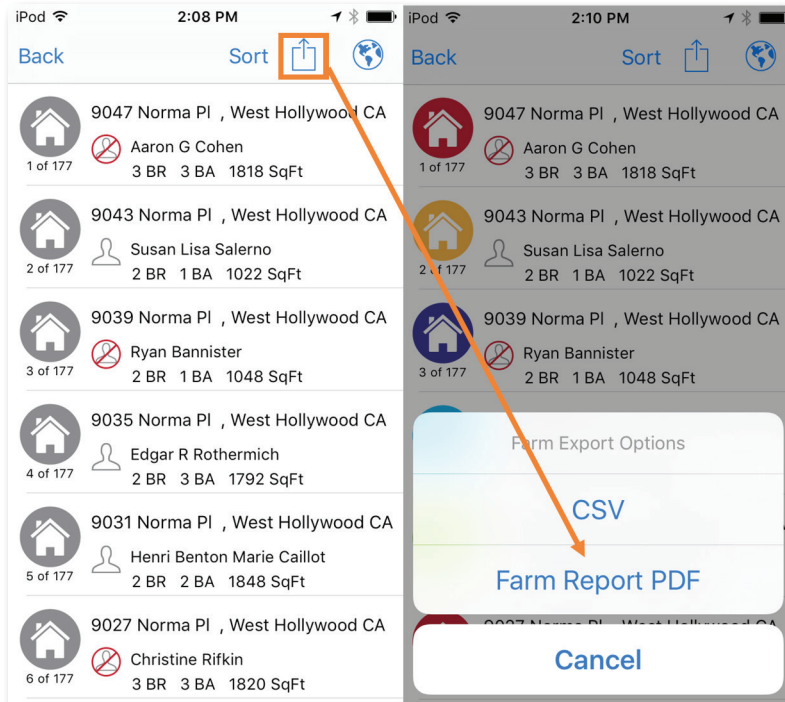
### Printing Your Farm



1. Select the **Share Icon** in the upper-right corner of the **Walking Farm** list view.
2. Select **PDF**.
3. Enter the email address you would like the PDF document sent to.
  - Within 5-10 minutes, your farm will be delivered to the email address specified.
4. The farm cover page has your sales rep's contact information, along with the report name (number of records and turnover rate) from the **Walking Farm** app.
5. Each subsequent page contains two properties with a large area for easy note-taking and checklist for status.
6. If you have previously created any notes or updated the status of any property, it will print with this document.

## **Walking Farm (cont.)**

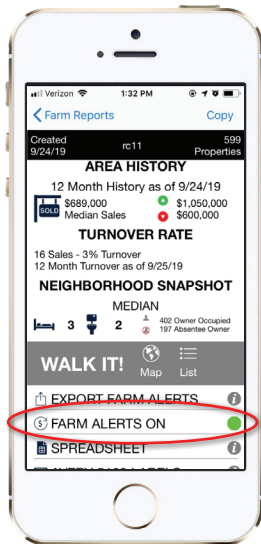
### Exporting as a Spreadsheet



1. Select the **Share Icon** in the upper-right corner of the **Walking Farm** list view.
2. Select **CSV**.
3. A dialogue will open for you to select a program to open it in (if available); or email the spreadsheet.
4. If you have previously created any notes or updated the status of any property, it will be reflected in the last 2 columns of the spreadsheet.

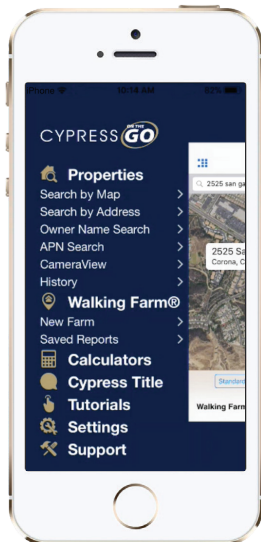
## Farm Alert Settings

### Changing Farm Alert Settings on a Single Farm

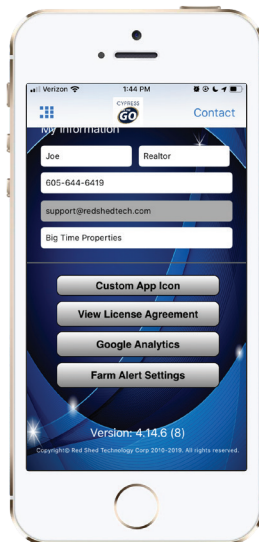


On the Farm Report screen, tap on the Farm Alerts **ON** button to toggle to **OFF**

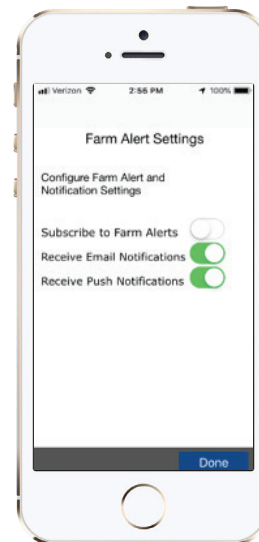
### Changing Farm Alert Settings for All Farms



1. Tap on **Settings** from the home screen



2. Tap on the **Farm Alert Settings** button



3. Move the toggle button to the **OFF** position next to "Subscribe to Farm Alerts"



## **Walking Farm**

### **ANDROID™ DEVICES**

#### **Step 1: Create an Area to Farm**

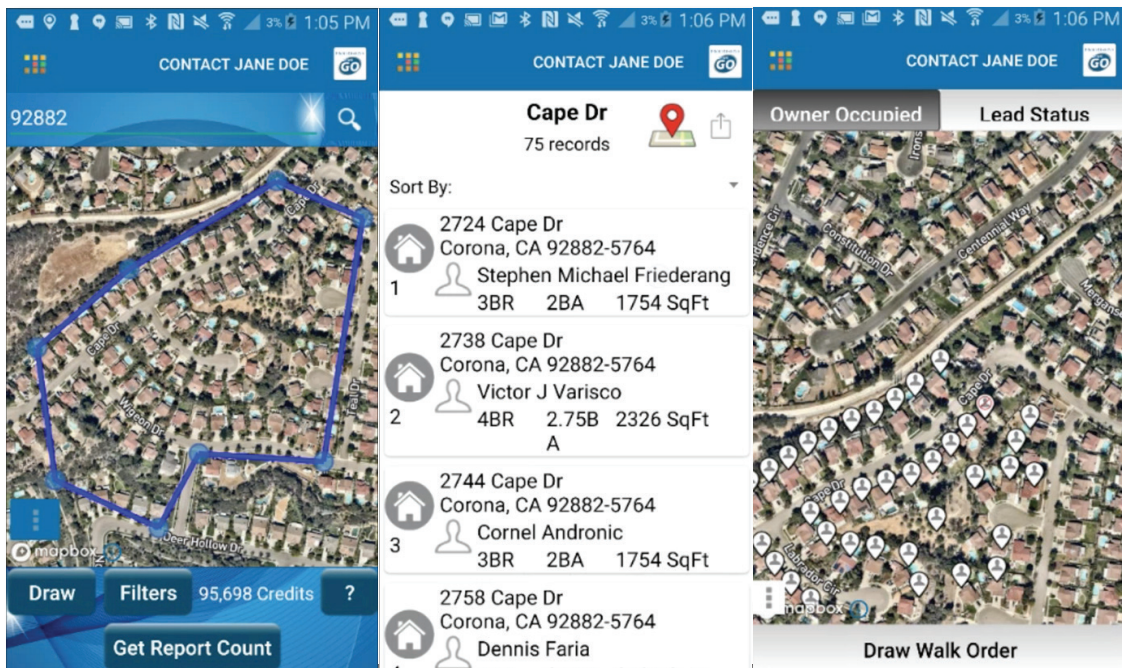
From the Home Screen of the application...

1. Select **Walking Farm**.
2. Select **Find a Farm Area**.
3. Locate an area on the map you wish to farm.
  - Drag your finger on the map to move the map, pinch in/out to zoom in/out, or
  - Search by city/state/zip using the search bar at the top of the screen.
4. Select **Draw**.
  - Tap to drop connecting points on the map around your farm area.
  - Close your shape by clicking on the first point.
  - Select **Done**.
5. To apply filter criteria, select **Filters**. Your selections will be updated on the map automatically. Click **Map** to return to the map view.
6. Select **Get Report Count** from the bottom navigation.
  - You will receive the property count and turnover rate.
7. Select **Get Report Count**.
8. Type a name for your farm area and select **OK**.



## **Walking Farm (cont.)**

### Step 2: Designate a Walk Order

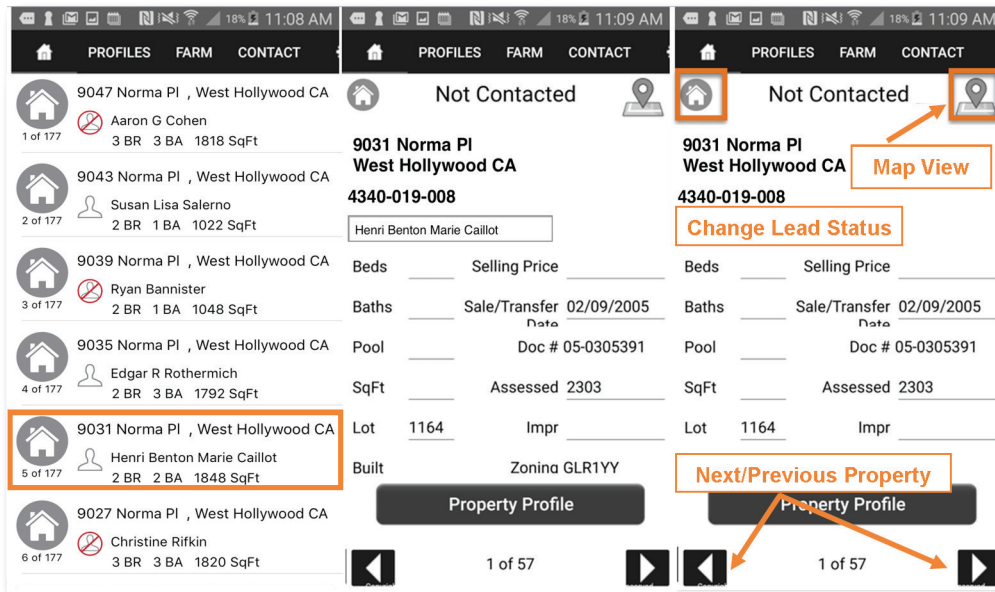


1. From the report options screen, select **Walking Farm**.
2. Select the **Map Icon** in the upper-right corner.
3. Default view is **Owner Occupied** status, or toggle between different status types available.
4. Select **Draw Walk Order**.
5. Drag your finger on the map across the pins to draw the order you wish to walk the neighborhood.
  - Draw your line **ON** the house pins for best results.
  - Create your order across all properties, or just a section you wish to walk that day.
  - Select **Done** to apply the walk order.
  - Select the **first pin** in your order and **tap the address flag** to begin walking, or tap the **Back** button on your device to return to the list view and select the first property.



## Walking Farm (cont.)

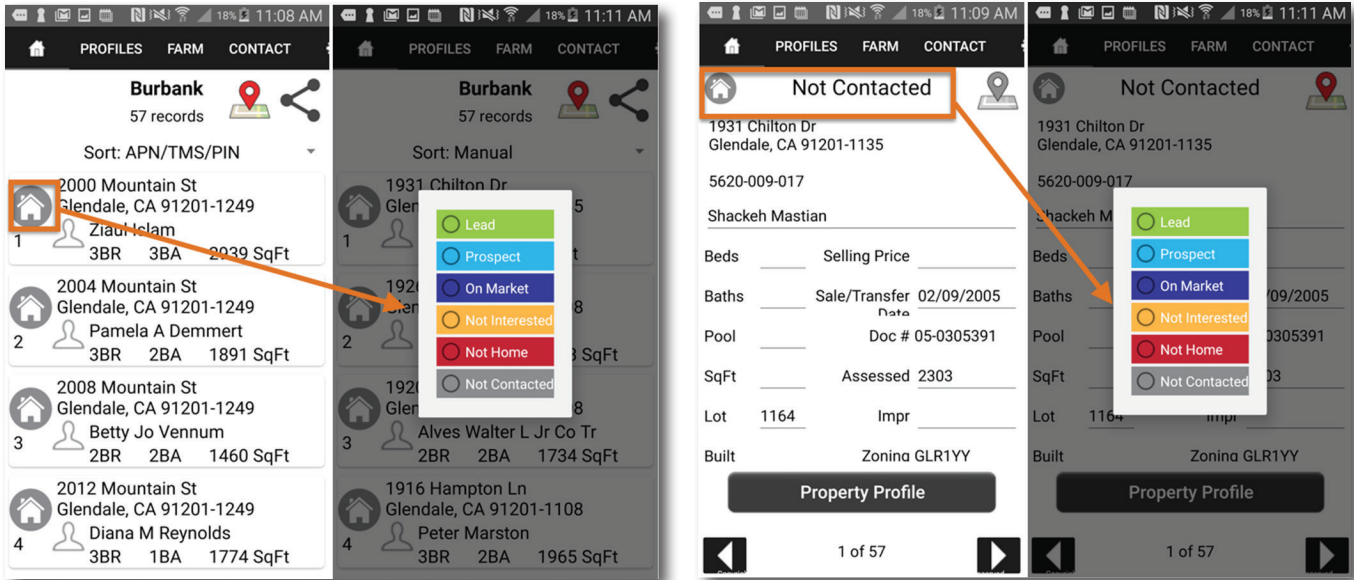
### Step 3: Walking Your Farm



1. In **Step 5** from the previous page (**Designate a Walk Order**), you should have selected a property in your farm to open.
2. The **Subject Property Detail View** contains a split-screen:
  - **Scroll the top-half** of the screen to view property characteristics and information.
    - Edit any details on the property to reflect current, accurate details.
    - Changes auto-save on entry.
  - Navigation: **Map Icon** shows you the subject property on a map, **House Icon** allows you to change the status of the property.
  - The **bottom-half** of the screen contains:
    - An area for **notes** which auto-saves on entry.
    - A button to request a **Property Profile** report.
    - Navigation to go to the **next** and **previous** properties on the list.

## Walking Farm (cont.)

### About the Property Status



**Status** was designed to provide a way to indicate properties you have visited, ones you may need to return back to, as well as other status types.

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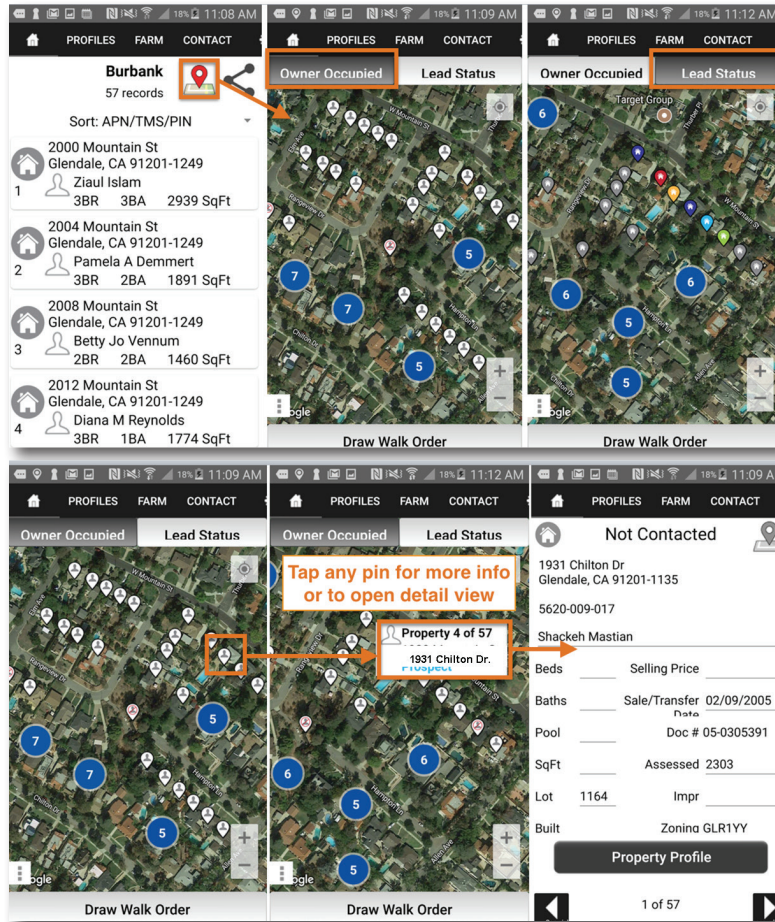
There are two ways to update the Status:

1. **List View:** Tap the **House Icon** and select the status from the list.
2. **Detail View:** Tap the **House Icon** and select the status from the list.



## Walking Farm (cont.)

### Using the Map View

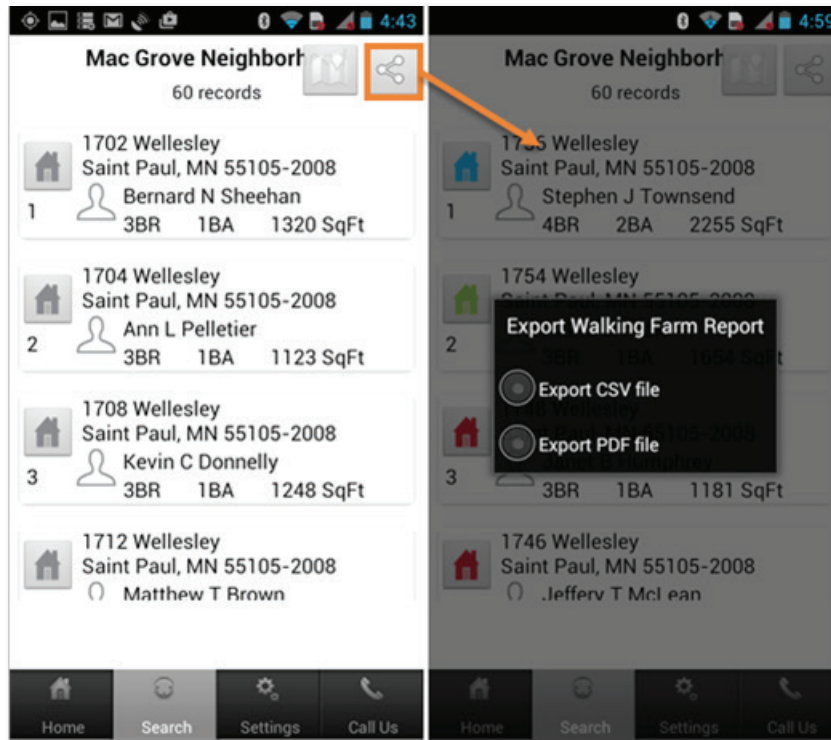


1. Select the **Map Icon** in the upper-right corner of the **Walking Farm** list view.
2. By default, the map shows the **Owner Occupied** Status.
3. Toggle between different status types available using the top buttons.
4. Return to the list view by selecting the **Back** button.
5. Open the **Detail View** on any property by tapping on the **pin**, and then tapping on the **address flag**.



## Walking Farm (cont.)

### Printing Your Farm

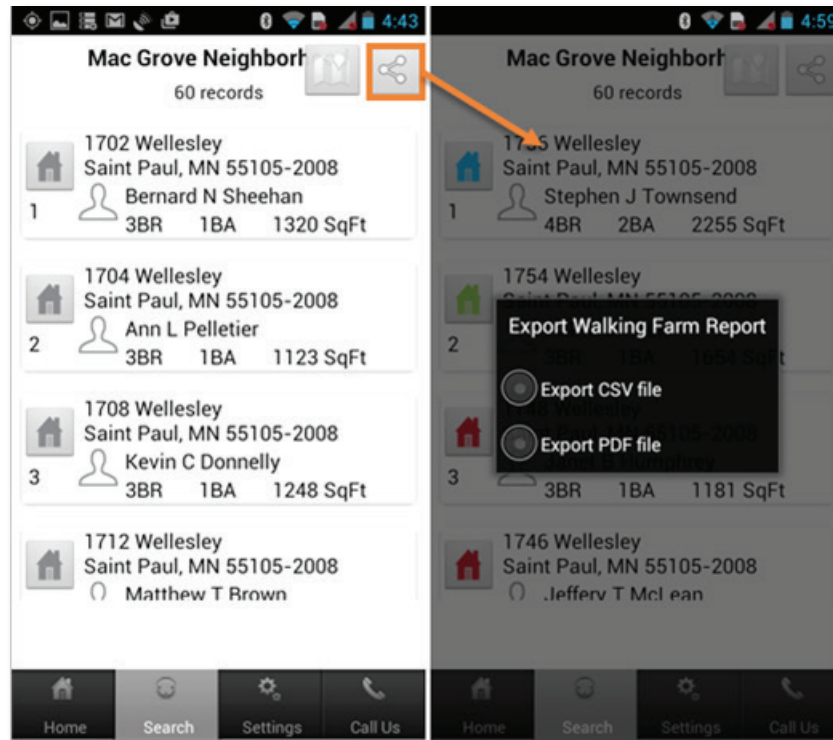


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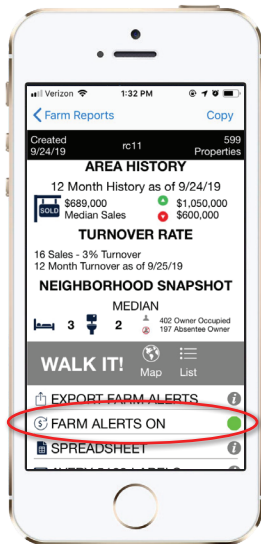


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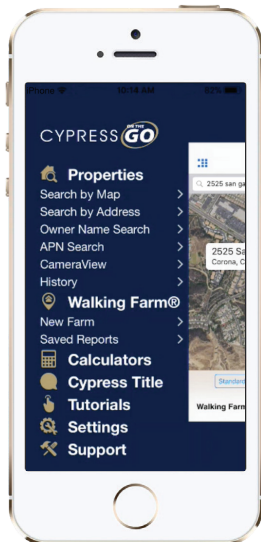
## Farm Alert Settings

### Changing Farm Alert Settings on a Single Farm



On the Farm Report screen, tap on the Farm Alerts **ON** button to toggle to **OFF**

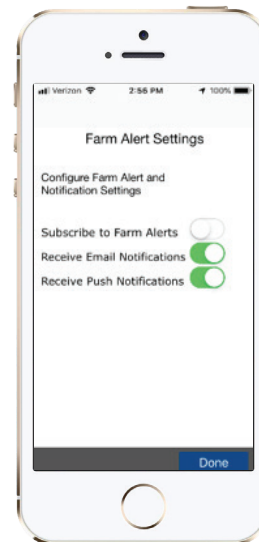
### Changing Farm Alert Settings for All Farms



1. Tap on **Settings** from the home screen



2. Tap on the **Farm Alert Settings** button



3. Move the toggle button to the **OFF** position next to "Subscribe to Farm Alerts"



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