CLIENT GUIDE

# 8020CRM documentation

End-to-end guidance for configuring 8020CRM, finding and working opportunities, managing investment and retail transactions, closing, reporting, and support.

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# Welcome to 8020CRM

Learn how 8020CRM connects customer relationships, property work, deals, activities, and operational reporting in one Salesforce experience.

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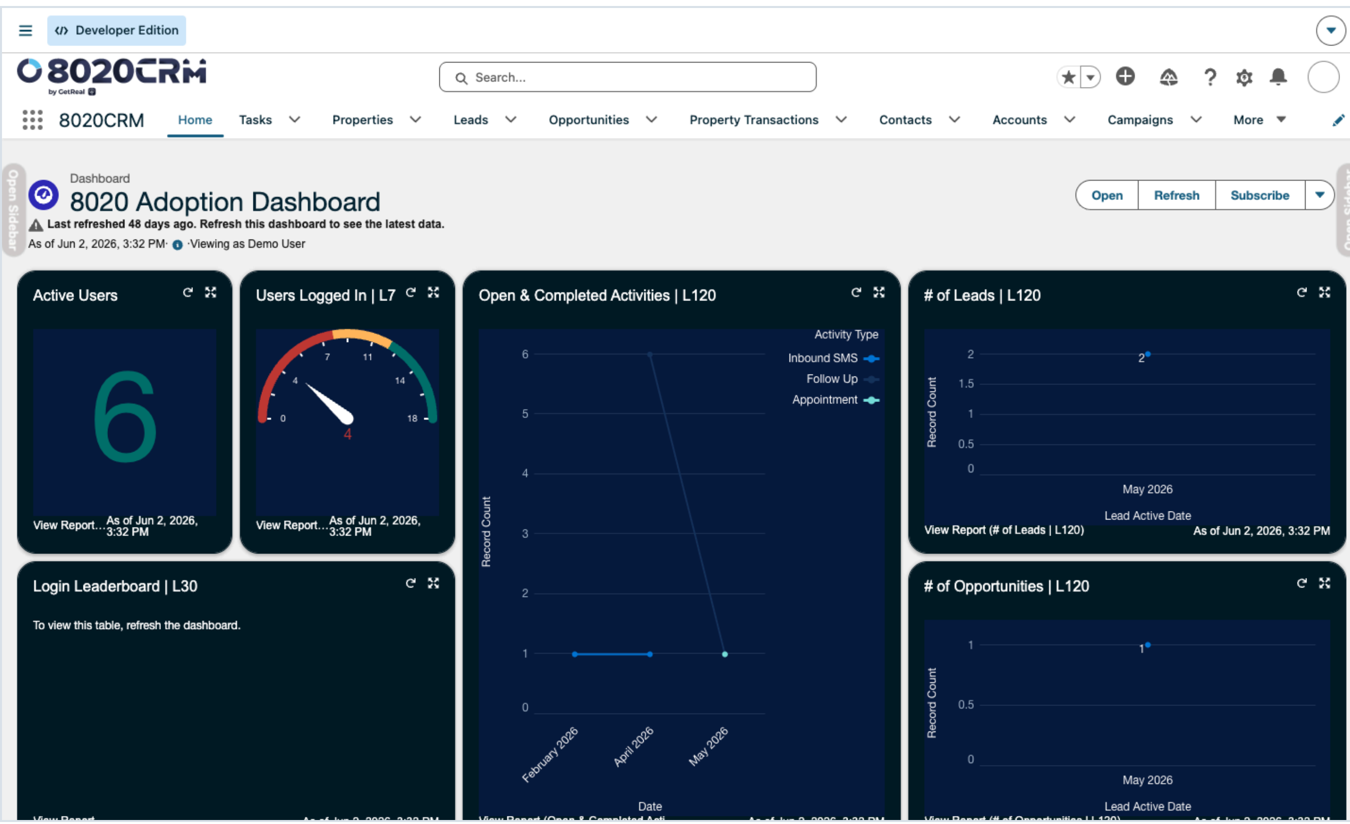
8020CRM brings customer relationships, property work, deals, follow-up, and reporting into one connected Salesforce experience. The goal is simple: each person should be able to see what has happened, who is responsible now, and what should happen next.

RAIN OS provides the communications and AI foundation used by configured 8020CRM experiences. RAIN Intelligence is optional and may not be available in every organization.




*The available navigation and dashboard content vary by role, access, and configuration.*

## What this helps you do

Use 8020CRM to:

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- Capture and qualify new interest.
- Connect people with the correct property and deal.
- Preserve proposals, milestones, activities, notes, and files.
- Coordinate work across sales, transaction, marketing, and management teams.
- Close the journey with complete information for reporting and follow-up.

## Choose a learning path

| I need to... | Start here |
| --- | --- |
| Understand the screen I am looking at | Home, navigation, and the utility bar and Record pages, tabs, and guided workspaces |
| Plan today's follow-up | Tasks, events, and daily work and RAIN Hub, Inbox, and daily priorities |
| Capture and convert a new relationship | Lead intake, assignment, and nurture and Lead conversion and deal setup |
| Run an acquisition, disposition, retail, or closing workflow | Guided forms by lifecycle, then the applicable deal lifecycle |
| Work buyer criteria and matches | Buy Box, buyer matching, and prospecting |
| Operate marketing | Campaigns, marketing, and response follow-up and Expenses, Campaign Statistics, and marketing performance |
| Understand results | Report and dashboard catalog and Reports, dashboards, and operational health |
| Configure or troubleshoot the product | Setup, access, and launch readiness and Troubleshooting and safe recovery |

## Where to work

Most users begin from Home, a work list, a queue, or an assigned activity. Open the record that best represents the work before starting an action.

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| Record | Use it for |
| --- | --- |
| Lead | Unqualified interest, early contact, assignment, and nurture |
| Property | The durable identity and known details for a property |
| Opportunity | Pipeline, customer relationship, and commercial progress |
| Property Transaction | Property-specific operations, parties, dates, offers, and closing |
| Offer | A distinct proposal and its terms or outcome |
| Task, Event, or Communication | The next commitment or completed interaction |

## Work through it

1. Start from the assigned work item or the intended customer, property, or deal record.
2. Review the owner, lifecycle status, recent activity, related records, and next action before editing.
3. Update the record that owns the business fact. For example, keep proposal terms on the Offer and operational milestones on the Property Transaction.
4. Save the change once, then confirm that the initiating record reflects it.
5. Check the related records that should receive or summarize the result.
6. Record the next Task, Event, or communication so responsibility remains clear.

Some results are immediate, such as a saved value or newly visible record. Assignment, property updates, relationship reconciliation, activity measures, campaign calculations, and connected-service work may complete later.

## Confirm the result

Work is ready to hand off when the intended records are connected, the current owner and lifecycle state are accurate, recent activity is visible, and the next responsible user can continue without reconstructing the history elsewhere.

For a delayed result, refresh the relevant records after a reasonable processing interval. A successful save confirms the first step completed; it does not always confirm that every related u

## If it does not look right

Before retrying, check whether the first attempt created a complete or partial result. Repeating conversion, enrichment, stage changes, outreach, or offer actions can create duplicate work or conflicting records. If part of the workflow succeeded, repair only the missing relationship, value, or follow-up step.

## Related guidance

- From first contact to close
- Roles, workspaces, and key records
- Setup, access, and launch readiness

# Home, navigation, and the utility bar

Start the day from the default 8020CRM interface, understand what Home shows by role, and use the navigation and utility bar without losing record context.

## Start from the 8020CRM app

Use the Salesforce App Launcher to open **8020CRM**. The packaged desktop navigation begins with Home and then provides the principal work areas: Tasks, Properties, Leads, Opportunities, Property Transactions, Contacts, Accounts, Campaigns, and Events. Analytics, Files, Maps, account, and support entries follow them when the user has access.

The navigation is a starting map, not a promise that every user sees every item. Licenses, permission sets, profiles, tab visibility, page activation, form factor, and local configuration can change the visible set.

## Read Home as a daily briefing

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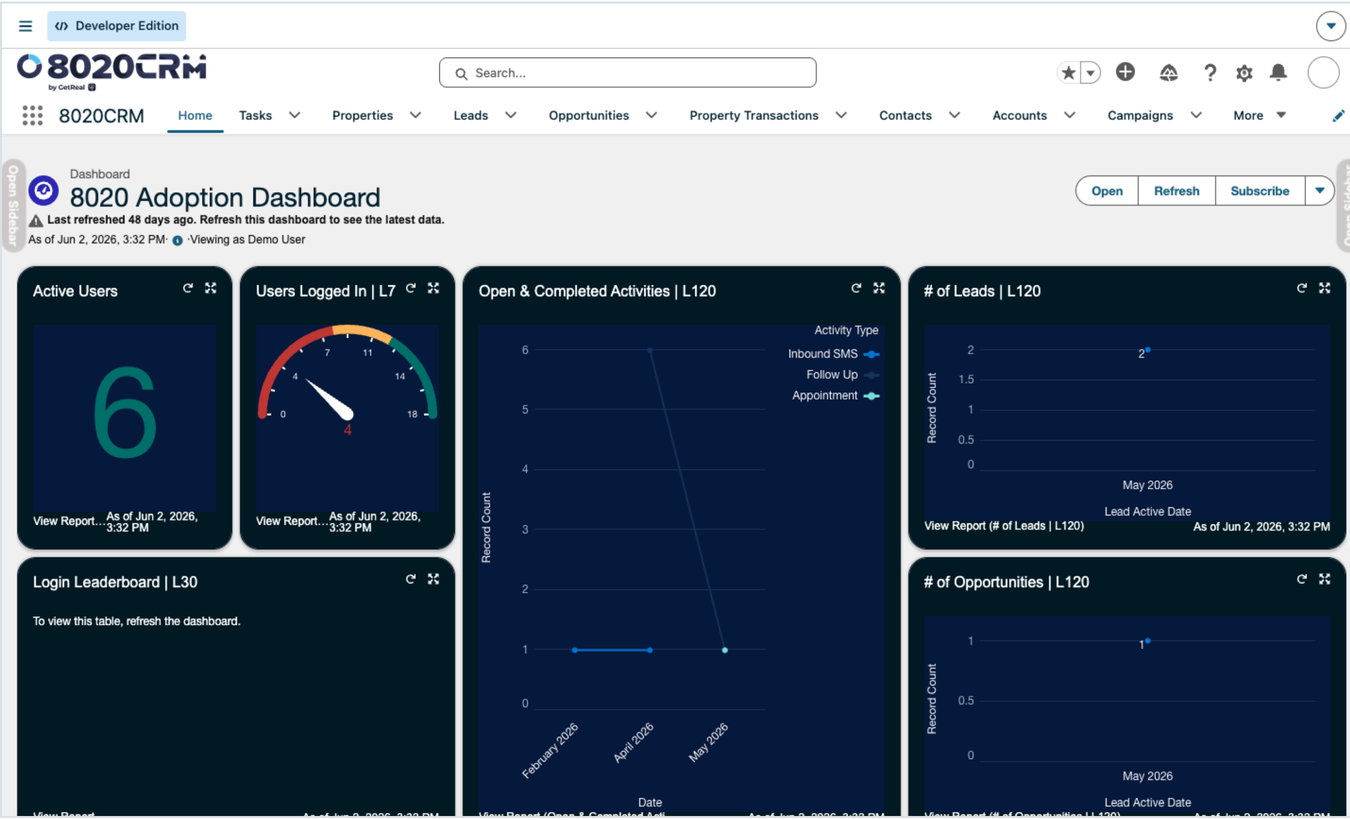


The default Home page combines several kinds of information:

| Home area | How to use it |
| --- | --- |
| Launch tiles | Open Properties, Leads, Opportunities, Property Transactions, Accounts, or Contacts quickly |
| Role dashboard | Review the measures selected for administration, leadership, lead work, acquisitions, dispositions, or marketing |
| RAIN | Review configured AI-assisted work and notifications |
| Today's Tasks | Identify work due today without opening the full Tasks tab |
| Events | Review appointments and scheduled commitments |
| Recent Records | Return to records opened recently; do not treat this as a complete work queue |
| Chatter | Publish or review collaborative updates according to record-sharing and notification rules |

D… s role-aware. Administrators and leadership can see different dashboards from us… ad, acquisition, disposition, or marketing responsibilities. A blank space can

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mean that the dashboard is hidden on error or that its permission condition is not met.

## Choose the right route

1. Use **Home** for orientation and exceptions.
2. Use **Tasks** for an owned work list across records.
3. Use an object tab such as **Leads** or **Opportunities** to work a list view and open the authoritative record.
4. Use the record's guided tabs and actions to perform the job with the correct context.
5. Return to Home or the work list after confirming the saved result and next responsibility.

> **IMPORTANT**
> Recent Records, dashboard rows, RAIN items, and search results are pointers. Open the underlying record before changing status, ownership, financial terms, or lifecycle milestones.

## Use the utility bar

The utility bar stays available while users move between records. The packaged 8020CRM bar can include:

| Utility | Intended use |
| --- | --- |
| RAIN | Open RAIN Hub features without leaving the current record |
| GetReal Support | Review or submit product support information |
| Chatter Feed | Monitor collaborative posts and updates |
| Phone | Place and receive calls when the user and call center are configured |
| To Do List | Work Salesforce's unified task list |
| Notes | Create and review Salesforce Notes |

Opening a utility does not change which CRM record owns the business fact. Confirm the active re[illegible], writing a note, accepting a suggestion, or launching an action.

## When something is missing

For a missing tab, check app assignment and tab visibility. For a missing page section, check the active Lightning page, application, record type, profile or permission, and device. For a blank dashboard, check folder sharing, source-record access, the dashboard running context, and the role condition. For Phone or RAIN, also check the dependency permission, service setup, and user assignment.

WORK BY SCREEN

# RAIN Hub, Inbox, and daily priorities

Use Inbox in RAIN Hub to review attention items, suggestions, and Intelligence without confusing a notification with the authoritative CRM record.

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## Open Inbox in RAIN Hub

Open **RAIN** from the 8020CRM utility bar or **RAIN Hub** from the RAIN OS app. RAIN Hub presents three operational areas when enabled:

- **Inbox** for records and events that need attention.
- **AI Insights** for generated observations and suggestions.
- **Intelligence** for the optional RAIN Intelligence experience.

Inbox is the default operational view. Its label can include an unread or attention count, and the utility item can highlight when new work arrives.

## Triage the Inbox

1. Search when you know a person, record, need, status, or other visible term.
2. Sort and filter to isolate the most important or oldest work.
3. Review priority, score, category, ownership, record type, timing, and configured display chips.
4. Open the related CRM record and verify its current status, recent activity, owner, and sharing before acting.
5. Claim an eligible item when responsibility must move to you.
6. Complete, approve, reject, clear, or mark the item read only after understanding what that action changes.
7. Confirm the resulting Task, Event, Communication, field update, or other durable record.

Inbox controls can include search, sorting, filters, sound, **Mark All Read**, pagination, and **Inbox Display Chips**. Display chips change the context shown on an item; they do not alter the underlying business record.

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> **IMPORTANT**
> Marking an Inbox item read acknowledges the notification. It does not complete the related CRM work unless the selected item action explicitly performs that work.

## Use suggestions safely

A next-best-action or field suggestion is decision support. Review the target record, suggested value or action, reason, confidence, owner, and any related communication before approval. After approval, reopen the record and confirm the actual change. Reject a suggestion when it is inappropriate, stale, unsafe, or based on incomplete context; record a reason when the interface requests one.

Automatic approval can be configured for eligible cases. Administrators should use it only where the action, field, confidence rule, permission boundary, and rollback path are understood.

## Understand counts and timing

RAIN Hub listens for new notification and insight events. Counts can update while the panel is open, but the related CRM transaction, provider callback, or background calculation may finish later. A count can also remain visible when the user can see the RAIN item but cannot open its related record because sharing is more restrictive.

Inbox is clear when no qualifying items remain. The empty state indicates that RAIN will notify the user when new work appears; it does not prove that every Salesforce Task, Event, queue item, or overdue record is complete.

## If the Inbox looks wrong

| Symptom | Check |
|---|---|
| RAIN Hub is missing | App or utility assignment, RAIN OS permission, Lightning page, and setup completion |
| Count does not match the visible list | Active filters, search, pagination, read state, ownership, and event timing |
| [illegible]ot open | Record sharing, object permission, record deletion, and stale relationship |

| Symptom | Check |
| --- | --- |
| Suggestion cannot be approved | Status, target access, field access, policy, confidence gate, and prior action |
| Sound does not play | Inbox sound preference, browser media policy, system volume, and notification relevance |

WORK BY SCREEN

# Tasks, events, and daily work

Distinguish the Tasks tab, Today's Tasks, To Do List, and record Activity tabs, then complete follow-up against the correct customer or deal.

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## Know which task surface you are using

| Surface | Best use |
| --- | --- |
| Tasks tab | Work list views across records, owners, dates, statuses, and priorities |
| Today's Tasks on Home | Quick review of work due today |
| To Do List in the utility bar | Keep a compact Salesforce task list open while navigating |
| Activity tab on a record | Review Tasks, Events, calls, and email in that record's context |
| Task record page | Complete one Task, review details and related records, use checklist or follow-up actions |

These surfaces can show overlapping records. Completing the same Task from one surface should update the others; creating a second Task creates separate work.

## Work a Task correctly

1. Open the Task and confirm its owner, due date, status, priority, subject, person relationship, and business-record relationship.
2. Open the related Lead, Opportunity, Property Transaction, or other business record when context is not clear.
3. Complete any checklist items and the actual customer or operational work.
4. Record the outcome in the appropriate activity, communication, appointment disposition, note, or business record.
5. nly when the work and outcome are complete.

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6. Use the follow-up Task or Event action when another commitment is required.
7. Confirm the next item has the correct owner, date, reminder, and relationships.

Task records can provide edit, delete, follow-up Task, follow-up Event, note, series, and Chatter-related actions depending on access and configuration.

## Work Events and appointments

Use an Event for scheduled time, meetings, and appointments. Relate it to the correct person and business record, then record the disposition or outcome after it occurs. Appointment outcomes can drive follow-up or lifecycle updates, some of which may complete asynchronously.

An Event marked complete without a meaningful outcome can leave the deal, report, or next action ambiguous. Conversely, changing the deal stage does not replace recording the appointment result.

## Avoid duplicate follow-up

Before creating another Task, check open Tasks on the related record, the current Action Plan, automated follow-up settings, and any delayed processing. If the first save was slow, refresh rather than resubmitting immediately.

Managers should review overdue work by owner and lifecycle context, not only total Task count. Reassigning a Task does not necessarily reassign the customer or deal.

WORK BY SCREEN

# Campaigns, marketing, and response follow-up

Plan and operate marketing from Campaigns, connect responses to people and deals, record expenses, and interpret attribution without overstating causality.

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## Find marketing work

The packaged top-level navigation label is **Campaigns**. “Marketing” is the business function and also appears as a tab on Lead, Opportunity, Property Transaction, Contact, and Account pages. Those record tabs bring campaign membership, journey, and response context into the customer or deal view.

Use the Campaign record for the initiative and its audience. Use the Lead, Contact, Opportunity, or Property Transaction for the current customer or deal. Do not use a Campaign as a substitute for qualification, ownership, or transaction state.

## Prepare a Campaign

1. Define the Campaign name, type, status, active period, owner, audience, objective, and budget conventions.
2. Define Campaign Member statuses and identify which status represents a meaningful response.
3. Add or import the intended Leads and Contacts, using the organization's duplicate and consent controls.
4. Confirm source, market, segmentation, and any connected journey or outreach configuration.
5. Record planned and actual costs consistently, including related Expense records when used.
6. Test with a small audience before broad execution.

## Handle responses

When a person responds, update the Campaign Member status and continue the work on the person's current Lead or Contact. Confirm ownership, recent activity, source, consent, active Property, and next action. Qualified interest can proceed through Lead conversion and deal cr[illegible] disqualification should preserve the reason and future handling.

The Marketing tab on a customer or deal record helps answer which campaigns and journeys touched it. It does not prove that one campaign caused the final result.

## Interpret attribution

Attribution depends on recorded relationships, qualifying lifecycle outcomes, dates, status mappings, and the configured analysis period. Opportunity influence and Campaign Statistics can update after conversion, stage changes, transaction changes, expenses, or scheduled reconciliation.

> **NOTE**
>
> Treat attribution as an operational model based on the data and rules your organization selected. It is evidence for comparison, not exclusive proof of causality.

## Completion signals

A Campaign is operationally ready when its dates, owner, audience, statuses, channel configuration, and cost conventions are complete. Response work is complete when the Campaign Member and authoritative customer record agree, the owner is accountable, and the next action is visible. Performance review is ready when Campaign Statistics reconcile to representative source records and Expenses.

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# From first contact to close

Follow the 8020CRM journey from intake and qualification through property work, offers, transaction coordination, close, and follow-up.

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The 8020CRM journey connects the first expression of interest to a clear business outcome. Seller, buyer, and sourced-property journeys differ, but each should preserve the customer, property, decisions, responsibilities, and next actions from one stage to the next.


## Before you begin

Agree on the qualification standards and handoff responsibilities for your organization. Users should know which team owns the relationship, which team owns property-specific operations, and when a proposal or milestone is ready for review.

## Work through it

1. **Capture the first contact.** Create or update the Lead with the best available identity, contact, source, market, property, timing, and communication-preference information. Confirm that it is not an avoidable duplicate and that an owner or monitored queue has the next action.
2. **Engage and qualify.** Record calls, messages, appointments, notes, files, and follow-up work. Keep the status aligned with the actual relationship. Record unknowns honestly and create a of entering unsupported assumptions.

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3. **Set up the deal.** When the relationship is qualified, create or connect the customer, Opportunity, Property, and Property Transaction needed for the journey. The Opportunity represents pipeline and commercial progress; the Property Transaction coordinates work for a specific property.
4. **Choose the property strategy.** Review the property identity, available details, freshness, parties, and business direction. Property data can support a decision, but retrieving data does not itself qualify a deal.
5. **Create and manage Offers.** Keep separate proposals as separate Offers when history matters. Record the direction, parties, amount, important terms, expiration, and expected close. Update the outcome only when that business event occurs.
6. **Coordinate contract and closing.** Maintain signed files, parties, obligations, dates, inspections, contingencies, costs, commissions, exceptions, and assigned work from the Property Transaction. Reminders support the team but do not prove that an external obligation was completed.
7. **Reconcile the outcome.** Use an accurate final state for successful, unsuccessful, cancelled, or abandoned work. Confirm current terms, final dates and amounts, completed relationships, remaining follow-up, and campaign context.

## Confirm the result

A clean handoff gives the receiving user the correct records, current owner, actual lifecycle state, accepted terms, recent activity, known exceptions, and a clear next action.

After conversion or close, some related records, activity measures, campaign results, or financial totals may appear later. Refresh the connected journey after expected processing completes before comparing reports or changing values again.

## If it does not look right

Do not repeat conversion or guided deal setup just because one related record is not immediately visible. First check the customer, Property, Opportunity, Property Transaction, and Offer for partial output. Correct the authoritative record or missing relationship, then verify the connected records again.

If totals differ after close, review the full journey rather than editing several records to make them match. A local value can be correct while another relationship or delayed summary still reflects ea

## Related guidance

- Welcome to 8020CRM
- Lead intake, assignment, and nurture
- Property details, enrichment, and comparables

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# Roles, workspaces, and key records

Match 8020CRM job responsibilities to daily workspaces, record responsibilities, handoffs, and layered Salesforce access.

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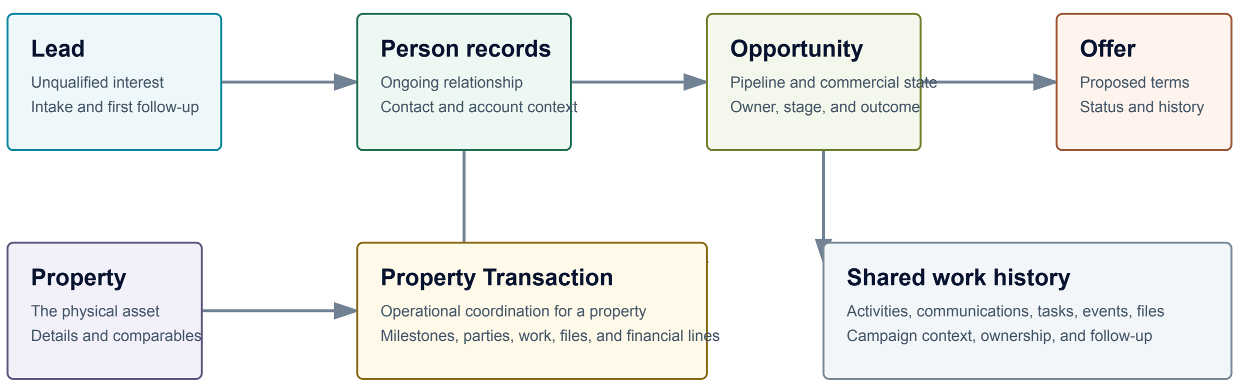
8020CRM organizes work around business responsibilities while keeping the customer and property journey connected. A person's job determines what they need to do; their license, permissions, sharing, workspace assignment, and feature configuration determine what they can actually see and use.

### The records serve different jobs

Keep each record's purpose clear, then verify the relationships during handoffs.




Some journeys use only part of this model. Record type, role, configuration, and installed capabilities determine the exact path.

## Where to work

| Responsibility | Typical starting point | Main records |
|---|---|---|
| Lead management | Queue, work list, or assigned activity | Lead, Task, Event, Communication |
| Sales and acquisitions | Customer or deal record | Lead, Opportunity, Property, Offer |
| Transaction coordination | Operational deal record | Property Transaction, Offer, Task, File |
| Skip to content | Campaign and response work | Campaign, Lead, Opportunity |

| Responsibility | Typical starting point | Main records |
| --- | --- | --- |
| Management | Reports, dashboards, and exception lists | Operational records and analytics |
| Administration | Setup and monitoring areas | Users, configuration, schedules, reports |

The exact navigation varies by role and organizational configuration. RAIN OS capabilities appear only where they are configured and authorized. RAIN Intelligence is optional.

## Work through it

1. Start from Home, a queue, a list, or an assigned activity, then open the intended business record.
2. Review the owner, current lifecycle state, recent activity, related records, and open work.
3. Launch guided work from the record that supplies the correct context. Starting from the wrong customer, property, deal, or campaign can relate the result incorrectly.
4. Update the record responsible for the fact. Sales may maintain pipeline progress on the Opportunity while transaction users maintain operational milestones on the Property Transaction.
5. Before handoff, confirm the relationships, current owner, actual status, known unknowns, files, accepted terms, dates, exceptions, and next Task.

## Confirm the result

A user is ready for daily work when they can find their assignments, open both owned and appropriately shared records, complete their principal actions, save related work, and access the reports needed for their role.

A clean handoff means the next person can continue from 8020CRM without updating the same value across several records or rebuilding context from outside the system.

## If it does not look right

Access is layered. Use the symptom to narrow the check:

| Symptom | Check first |
| --- | --- |
| One record is missing | Ownership, team, queue, and sharing |
| A record opens but a field or action is missing | Role access, record type, page assignment, and visibility |
| A guided action opens but fails | Access to every record and field involved, not only the starting record |
| A report or dashboard is missing | Folder sharing and source-record access |

Test with the affected user's access. An administrator may see records and actions that a normal user cannot. A visible section also does not guarantee access to every record behind it.

## Related guidance

- Setup, access, and launch readiness
- From first contact to close
- Welcome to 8020CRM

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WORK BY SCREEN

# Record pages, tabs, and guided workspaces

Understand the packaged Lead, Opportunity, and Property Transaction pages, including abbreviated and role-conditional tabs.

## Lead page

The default custom Lead page combines highlights, Lead Path, active Property selection, activity tools, the Lead Intake Form, and duplicate review. Its tabs can include:

| Tab | Meaning |
| --- | --- |
| Prop | Select or review the active Property |
| Details | Review and edit Lead fields |
| Activity | Review activity measures and Salesforce activity history |
| Chatter | Collaborate on the Lead record |
| Marketing | Review journeys and Campaign relationships |
| Related | Review all related lists available to the user |

Use the Lead Intake Form for qualification and intake detail; use Details for a direct field review. Confirm the active Property before conversion.

## Opportunity page

The Opportunity page has a general record tabset and a lifecycle workspace. General tabs can include **Prop**, **Opp**, **Contacts**, **Team**, **Activity**, **Chatter**, **Marketing**, and **Related**.

The lifecycle workspace can include:

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| Tab | Meaning and visibility |
| --- | --- |
| Acq | Acquisition form for eligible investment opportunities |
| Buy/Sell | Retail form for eligible retail buyer or seller opportunities |
| Lead | Opportunity Intake Form |
| Appts | Appointment and Event viewer |
| Offers | Offers related to the Opportunity |
| Financials | Products, costs, or related financial detail available to the user |

`Prop` means Property context, `Opp` means Opportunity detail, and `Acq` means Acquisition. These abbreviations are page labels, not separate record types.

## Property Transaction page

The Property Transaction page concentrates deal execution. Its general tabs can include Contacts, Details, Activity, Chatter, Marketing, Related, and Team. Its lifecycle workspace can include:

| Tab | Meaning and visibility |
| --- | --- |
| Buy/Sell | Retail transaction form |
| Dispo | Disposition form for eligible investment transactions |
| Buyers | Buyer prospects and matching for eligible seller or disposition work |
| Offers | Offers related to the transaction |
| TC | Transaction Coordination form for authorized users |
| Financials | Transaction economics and related financial records |

`Dispo` means Disposition and `TC` means Transaction Coordination. Tab visibility can depend on record type, lifecycle, custom permission, profile, device, and page activation.

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## W[illegible]cross tabs

1. Confirm the record name, type, owner, stage, and active Property.
2. Open the tab that owns the job rather than editing the nearest similar value.
3. Save once and confirm the authoritative record.
4. Check related records and summaries after expected automation completes.
5. Create or confirm the next Task or Event.

If a tab is missing, do not assume the feature is uninstalled. Check page activation, app, record type, permissions, form factor, and the tab's visibility condition.

GET READY

# Setup, access, and launch readiness

Prepare 8020CRM for launch by validating releases, access, business configuration, connected services, delayed work, and complete user journeys.

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8020CRM is ready to launch when representative users can complete approved business journeys and administrators can confirm both immediate and delayed results. Being able to open the application is not enough; access, configuration, workspaces, connected services, automation, and reporting must work together.

## Before you begin

Use an approved release plan and a representative test environment. Identify the business owner for each enabled journey and choose normal-user test accounts for every role. Back up business data and organization-managed configuration according to your release policy.

Document the expected operating model, including lifecycle choices, markets, queues, routing, forms, products, campaign conventions, connected services, recurring work, and support ownership.

## Work through it

1. **Confirm availability.** Verify that the intended 8020CRM and RAIN OS capabilities are available. Treat RAIN Intelligence and other connected services as optional unless they are separately licensed, configured, and authorized.
2. **Review initialization.** Confirm that organization settings, approved existing values, forms, reference information, and required recurring work are present. Make sure delayed or scheduled work is visible to administrators.
3. **Build access by role.** Start with the maintained access grouping that best matches each job, then add only what the person needs. Confirm licenses, records, fields, actions, pages, sharing, and report folders.
4. **Configure the business model.** Review enabled record types, statuses, stages, lifecycle mappings, markets, queues, assignment, forms, products, financial setup, and reporting periods entry points to users.

5. **Activate workspaces.** Confirm that intended pages and actions appear for the right roles and devices. Every visible action should have the access and configuration needed to complete its work.
6. **Validate connected services.** Confirm the business purpose, authorized users, service account or sender, capacity, monitoring owner, and support route. Technical connectivity alone does not mean the user workflow is ready.
7. **Run complete journeys.** Test Lead intake and assignment, property work, deal setup, Offers, activities, closing, reports, delayed completion, one controlled failure, and one safe retry for every enabled journey.

## Confirm the result

Launch readiness requires normal users to complete their responsibilities, managers to see trustworthy operational results, and administrators to distinguish pending processing from a true failure. Reporting should agree with the tested records after expected delayed work completes.

Keep the release in a controlled validation period through at least one expected recurring cycle. Monitor early assignment, connected requests, failed work, service usage, and reconciliation results.

## If it does not look right

Do not enable an incomplete capability for broad use. Restrict its entry point until access, settings, data policy, and downstream processing are ready.

When a test fails, determine whether the initiating record saved, whether part of the related work completed, and whether the remaining step is delayed. Correct the failed stage, then retry once. Avoid repeating the entire journey when valid records already exist.

## Related guidance

- Roles, workspaces, and key records
- From first contact to close
- Welcome to 8020CRM

For Salesforce-owned access controls, use the official guidance for Permission Sets, Permissions ar[illegible], and Sharing and Record Access Features. Then return to the 8020CRM role jo[illegible]e user can complete the intended task with no unrelated elevated access.

FIND AND QUALIFY

# Property search and sourcing

Find target properties, preview search volume, bring selected results into 8020CRM, and manage saved searches without creating avoidable duplicates.

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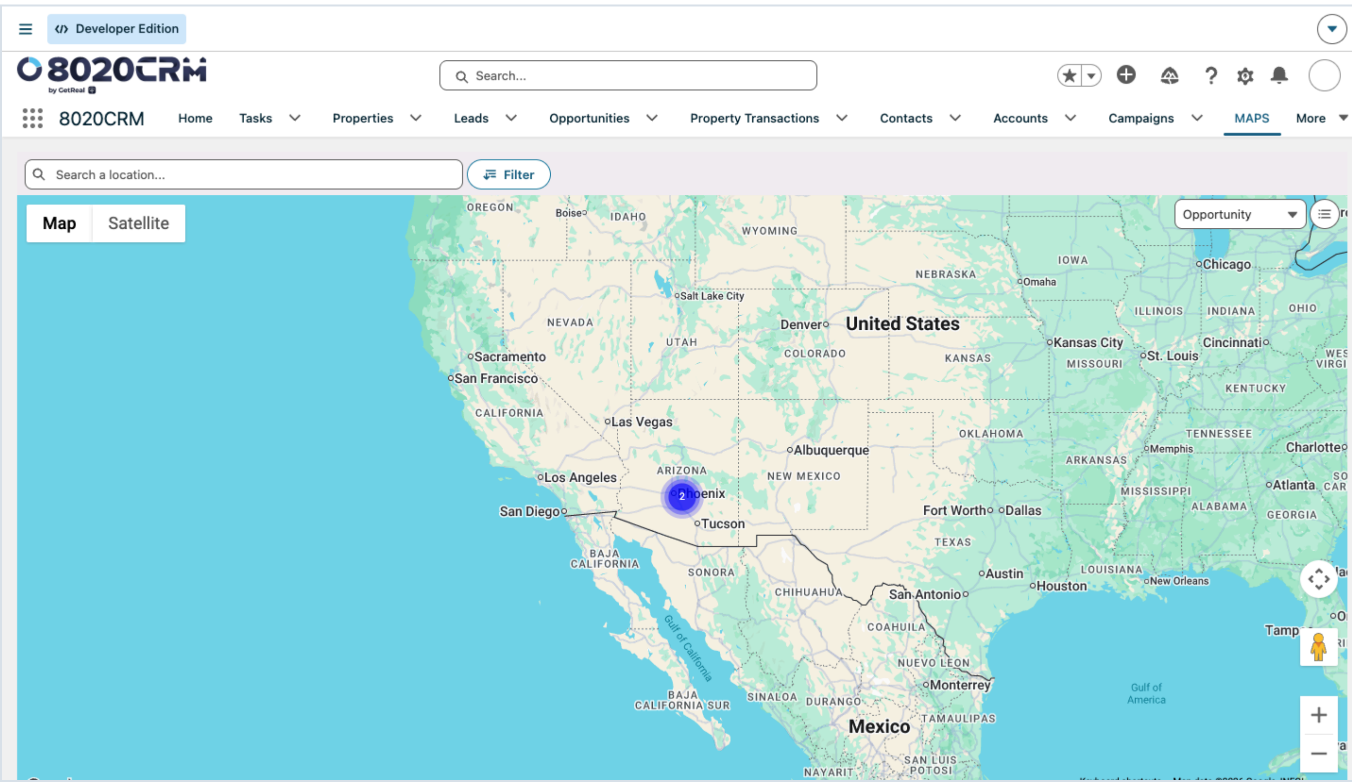
8020CRM property sourcing turns a search definition into Property records that can support outreach and active deals. Counting, retrieving, and saving are separate stages, giving you a chance to refine the audience before using paid services or adding records to daily workflows.




*The demo map is shown at a broad regional level. Search criteria and available record types vary by configuration.*

## Before you begin

Confirm that property search is configured, service balance is available, and you can create or update the resulting records. Decide whether the list is for outreach, market monitoring, or a one-property lookup. If the search may create Leads, request contact information, export a file, or u[illegible], confirm the business purpose and privacy rules first.

## Work through it

1. Open the property-search workspace and give the search a distinct name that reflects its market and purpose.
2. Define the location using the options available to your organization.
3. Add only the property, owner, listing, equity, or motivation criteria needed for the business purpose.
4. Request a count. No Property records are expected at this stage. Narrow an unexpectedly broad result before retrieving details.
5. Set a practical result limit and review any export, automatic-update, Lead-creation, or contact options.
6. Retrieve the property details. Larger requests may continue after the page returns control.
7. Review new and existing results separately. An external result may already match a Property in 8020CRM.
8. For an existing Property, choose whether to update available values, replace mapped values, or ignore the result. Replace existing information only when current provider values should take precedence.
9. Select the properties that should become operational records and start the save or follow-on work once.
10. Open a sample of the resulting Properties and confirm identity, address, ownership context, and relationships before outreach or deal work begins.

## Confirm the result

The count is complete when a volume appears; retrieval is complete when results are available for review. Saving is complete when selected new Properties exist and selected existing Properties reflect the chosen handling. Follow-on work is complete only when each intended Property has the expected Lead, Prospect, or export relationship.

The count and final total can differ because of result limits, duplicate matching, invalid results, provider changes, or save rules. Use the retained Property records as the inventory for daily work.

## If it does not look right

Large retrievals, exports, saved-search updates, Lead creation, and contact work may finish later. Re[illegible]earch and inspect resulting records before submitting the same scope again.

Identify the failed stage before retrying. If Properties already exist, repair only the missing Lead, export, contact, or relationship step. Use a small result limit when testing changed criteria or recovering from a failure. Repeating the full search can create another search history entry or duplicate downstream work.

Contact information and ownership data do not establish permission to call, text, or email. Apply your organization's consent, suppression, access, and retention policies before outreach.

## Related guidance

- Property details, enrichment, and comparables
- Lead intake, assignment, and nurture
- From first contact to close

FIND AND QUALIFY

# Property details, enrichment, and comparables

Refresh a property profile, understand cached and deferred results, review comparable evidence, and save accepted valuation work in 8020CRM.

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8020CRM can add available ownership, physical, listing, tax, motivation, media, and comparable information to a Property. A detail refresh supplies facts; a comparable analysis supports a decision. Users remain responsible for selecting meaningful evidence and approving any saved valuation.

RAIN Intelligence can provide an enhanced comparable experience when separately licensed, connected, and authorized. Standard property details and comparable work remain useful without it.

## Before you begin

Confirm that the Property has enough reliable identity information, such as a complete address or parcel and postal context. Correct obvious errors before requesting paid data. Make sure the Property related to the Lead, Opportunity, or Property Transaction is the intended subject.

## Work through it

1. Open the intended Property or a connected customer or deal record.
2. Start the property-details experience and confirm the displayed subject before requesting data.
3. Review the available profile and its freshness. If the information is current enough for the task, use it without forcing another refresh.
4. When details are missing or stale, request one refresh and note whether existing mapped values will be updated or replaced.
5. After completion, compare the displayed profile with the saved Property. A value may be visible even when access, validation, or an unsupported choice prevents it from being retained.
6. To build a comparable analysis, review candidate location, property type, size, features, age, distance, and listing or sale facts.
7. Accept only candidates that are meaningful evidence for the subject Property. Save the ore reviewing summaries or weights.

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8. Save the estimates your organization uses only after reviewing the selected evidence and assumptions. Record material user adjustments and the analysis date.

A comparable result is an analysis aid, not a certified appraisal or guaranteed value.

## Confirm the result

A successful detail refresh shows the intended Property, current detail sections, a current freshness marker, and any expected saved-field changes. A successful comparable save shows an analysis related to the subject Property, the accepted candidate rows, and any deliberately retained estimate.

Candidate previews or map results do not by themselves mean a full analysis ran. For optional RAIN Intelligence work, confirm that the returned analysis is visible and that accepted records or estimates were saved.

## If it does not look right

Bulk refreshes, candidate enrichment, weights, and summary values may complete after the parent record appears. Wait for related Properties and analysis rows to settle before editing the accepted set again.

Before retrying a refresh, check the Property identity, freshness, available stored detail, service usage, and pending work. Repeating a request may use additional service balance. For a partial bulk result, retry only failed Properties.

Before repeating a comparable save, confirm which candidates and estimates already exist. Repair an invalid candidate, missing access, or failed relationship instead of creating a second analysis unless a separate analysis is intentional.

## Related guidance

- Property search and sourcing
- Lead intake, assignment, and nurture
- From first contact to close

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FIND AND QUALIFY

# Lead intake, assignment, and nurture

Capture a complete Lead, route eligible work to the right owner, preserve contact preferences, and move long-term opportunities into nurture in 8020CRM.

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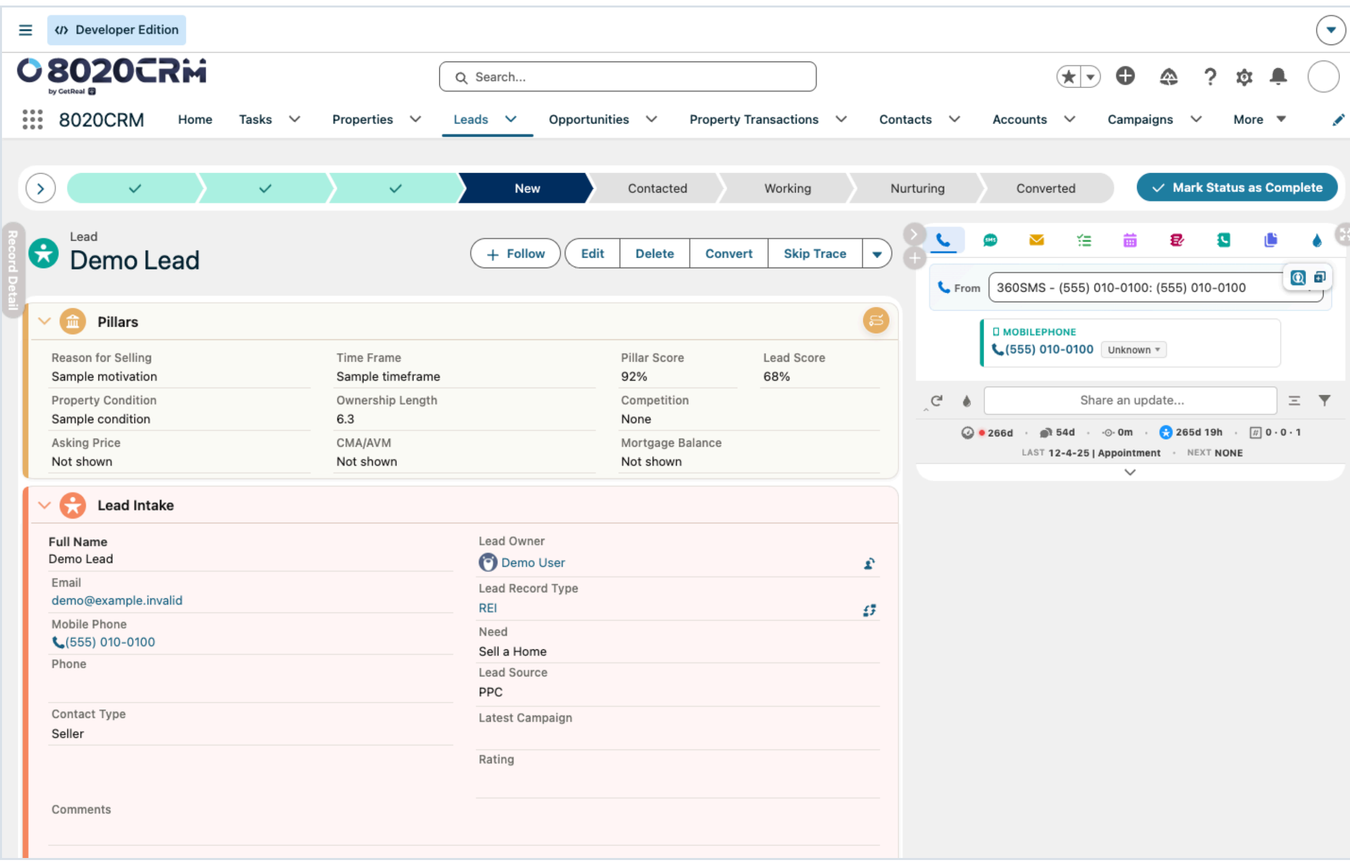
Lead intake in 8020CRM should create a workable relationship record, not just a name and phone number. A complete Lead preserves who the person is, why they contacted you, the relevant market or property, communication preferences, the responsible owner, and the next action.




*This sanitized demo shows the structure of the workspace; fields and actions vary by Lead type and user access.*

## Before you begin

Know your organization's minimum intake standard, Lead types, statuses, queues, and qualification rules. Confirm that you can access the intake experience, related Properties, and the activities used for follow-up. Contact enrichment is optional and may require separate authorization and service balance.

## Work through it

1. Use the intake channel that matches how the inquiry arrived, such as direct entry, a submitted inquiry, or a selected Property.
2. Search for an existing person before creating a Lead. Review any suggested match using the full identity and context, not a single matching detail.
3. Capture the available name, phone, email, source, need, rating, market, property, address, and comments. Do not infer consent, motivation, or an ownership relationship.
4. Choose the Lead type and initial status that represent the actual business state.
5. Save once, then review the normalized contact and address information, source, lifecycle values, communication preferences, and related Property.
6. Place eligible work in the intended queue or configured intake route. Assignment generally applies to qualifying queue-owned Leads, not every Lead save.
7. Confirm that the owner becomes an active assignee or that the Lead deliberately remains in a monitored queue.
8. Create the first Task, Event, or communication and record its outcome against the correct Lead and business context.
9. Update status and qualification as the relationship develops. Use an unqualified state only after that decision is made and the reason is recorded.
10. When the opportunity is viable but not ready, use the configured nurture path and set a meaningful future follow-up.

## Confirm the result

Intake is complete when one intended Lead exists, required information is present, source and property context are correct, and no duplicate decision remains unresolved. Assignment is complete when an accountable user owns the Lead or it remains intentionally in a monitored queue.

Nurture is complete when the Lead has the correct status, owner, reason, and future action. A scheduled transition may not happen immediately when the Lead first becomes eligible.

## If ook right

Skip to content

Property creation, contact information, activity summaries, assignment notices, and nurture transitions may finish after the Lead saves. Refresh the Lead and inspect related records before repeating intake or routing.

Do not create another Lead because assignment or enrichment is late. Correct the missing stage on the existing Lead. Do not move a Lead in and out of a queue to force routing; this can create repeated notices or replace a deliberate owner choice. Correct the queue, eligibility, or active-user issue, then perform one controlled reassignment.

An available phone number or email address is not consent. Preserve known channel preferences and restrictions, and follow your organization's outreach, access, and retention policies.

## Related guidance

- From first contact to close
- Property search and sourcing
- Property details, enrichment, and comparables

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FIND AND QUALIFY

# Lead conversion and deal setup

Convert a qualified Lead once, verify the resulting customer and deal records, and establish a reliable Property Transaction in 8020CRM.

## What this helps you do

Convert a qualified Lead into the customer and deal records your team will use in 8020CRM. Conversion is complete only after you confirm the new records are connected correctly and the next action is assigned.

## Where to work

Begin on the qualified Lead. After conversion, use the Opportunity for the sales relationship and pipeline stage. Use the Property Transaction for property-specific work, parties, offers, dates, and transaction activity. The converted Lead remains the history of the original intake.

## Before you begin

Confirm the Lead meets your organization's qualification standard. Review the person's identity, contact information, source, owner, Lead type, intended deal type, current status, property or buying need, and next commercial step. Resolve obvious duplicate people, businesses, and Properties before converting.

Also review open Tasks, Events, notes, Files, campaign history, and Action Plans. Confirm you can convert Leads and access the customer, deal, and property records involved.

## Work through it

1. Open the qualified Lead and verify the owner, source, primary contact information, and business need.
2. If the Lead concerns a specific property, confirm the active Property is the correct one.

3. Search for an existing Account and Contact for the same person or business. Use a verified match; otherwise create the appropriate new records during conversion.
4. Confirm the Opportunity's deal type, owner, initial stage, and required information.
5. Start conversion once and wait for the result. Do not open a second attempt in another tab.
6. Open the resulting Account and Contact. Confirm identity, ownership, contact information, and source context.
7. Open the Opportunity and Property Transaction. Confirm they point to each other and share the intended Property, primary Contact, deal type, owner, and compatible lifecycle status.
8. Review related activities, notes, Files, campaigns, and plans. Create or confirm the next Task, appointment, Action Plan, or guided work item from the new deal record.

## Confirm the result

The Lead shows that it was converted and links to the expected customer and Opportunity. The Opportunity and Property Transaction both open and agree on the customer, Property, owner, deal type, and current business state. The next activity is visible where the team will perform the work.

Some related history may appear after the primary conversion succeeds. Refresh the new records and allow delayed updates to finish before deciding that an activity, note, campaign relationship, or summary is missing.

## If it does not look right

- If conversion is unavailable or blocked, recheck Lead status, required information, duplicate choices, allowed values, permissions, and access to the intended records.
- If the Lead already shows as converted, do not convert it again. Repair the missing or incorrect relationship on the existing records.
- If the Opportunity exists but the Property Transaction is late, refresh and review the Property relationship before creating anything manually.
- If the first attempt failed, check whether any customer or deal records were created. Correct the specific issue, then retry once.
- Avoid repeatedly changing stages to force an update; stage changes can create duplicate notices, Tasks, or other follow-up.

## R[illegible]nce

Activities, communications, and follow-up explains how to continue work from the converted deal. Use the applicable investment seller, retail buyer, or retail seller lifecycle for the next business stage.

ENGAGE PEOPLE

# Activities, communications, and follow-up

Record calls and messages, schedule Tasks and Events, preserve the correct record context, and verify follow-up outcomes in 8020CRM.

## What this helps you do

Keep a reliable history of what happened, what is scheduled, and what should happen next. Correct activity relationships help the team understand the person involved, the active deal, the owner, and the expected follow-up.

## Where to work

Start from the record that represents the current business context. Before conversion, that may be a Lead. For an active deal, it is usually the Opportunity or Property Transaction. A person relationship identifies the Lead or Contact involved; a business-record relationship identifies the deal, account, or property the activity concerns.

## Before you begin

Confirm the recipient's identity, preferred channel, consent, suppression status, message purpose, and any timing restrictions. Calling, SMS, email, and scheduling may require separate authorization, sender setup, calendars, or provider availability. A visible option does not by itself confirm that a channel is ready.

## Work through it

1. Open the current Lead, Contact, Opportunity, or Property Transaction.
2. Choose the appropriate activity: call, call log, SMS, email, Task, Event, note, or File.
3. Confirm the person relationship and the business-record relationship. A correct Contact attached to the wrong deal will make timelines and summaries misleading.
4. [illegible]d time, direction, subject, outcome, owner, and concise notes needed by the

5. For a Task, set a realistic due date, status, priority, owner, and reminder. For an Event, confirm start and end times, attendees, location, availability, and reminder behavior.
6. For a message, verify the sender, recipient, approved content, and scheduled time. Review the final audience before any bulk send.
7. Save or send once and wait for the completion response.
8. Open the resulting activity and confirm its person, business record, owner, timestamp, and status.
9. Create the next follow-up immediately when the outcome requires one.

Use Chatter for internal collaboration when your organization has enabled it. A Chatter post is not an SMS or email to the customer and should not be used as proof that external outreach occurred. Post on the record that owns the discussion and confirm that everyone in the intended audience can access that record.

## Confirm the result

A Task or Event appears in activity history with the intended owner, relationships, time, and status. Notes and Files are available from the intended record to the expected audience.

For SMS or email, a saved communication means 8020CRM accepted the request. Delivery is confirmed only when its available result reaches a delivered, failed, or other final state. Counts, last-activity dates, next-activity dates, and similar summaries may update later than the source activity.

## If it does not look right

- If an activity appears on the wrong record, inspect both its person and business-record relationships before creating another activity.
- If a message is scheduled or pending, check its scheduled time and processing state. Do not resend while delivery is unresolved.
- If a message failed, correct the recipient, sender, consent, or available delivery issue, then retry only the failed recipient.
- Before recreating a Task or Event, search history and the calendar by person, owner, deal, and time.
- If the source activity is correct but a summary is stale, allow recalculation to finish. Changing a summary does not repair the underlying activity.

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- If a Chatter post exists but no notification arrived, do not repost it. Confirm the recipient can see the post, then have an administrator review Salesforce's organization-level Chatter email settings, the user's personal notification settings, and verified sender configuration. See Chatter Email Settings and Branding and Troubleshooting Chatter Email Notifications.
- If the issue is how Tasks, Events, or activity history appear, compare the source record with Salesforce's Activities overview and Activity Timeline guidance.

## Related guidance

Use Lead conversion and deal setup when activity should move to a new deal context. Use Transaction coordination for contract milestones and shared close work.

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RUN DEALS

# Investment seller lifecycle

Move an investment seller opportunity from property intake and qualification through acquisition, disposition, closing, and final reconciliation.

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## What this helps you do

Manage an investment seller relationship from intake through acquisition and the chosen investment outcome. Acquisition means buying or securing control of the property. Disposition means the later sale, assignment, or other approved exit. This is different from representing a homeowner in a retail listing.

## Where to work

Use the Lead or Contact for identity, consent, and early communication; the Property for durable property facts; the Opportunity for the seller relationship and pipeline; the Property Transaction for property-specific operations and financial context; and a separate Offer for each material proposal.

## Before you begin

Confirm the seller's identity and property relationship, the correct Property, owner, source, market, communication preferences, occupancy and access, condition, motivation, timing, and known financing or lien context. Leave unknowns incomplete rather than guessing.

Property data, comparable analysis, and optional RAIN Intelligence can support research. Treat estimates and suggestions as decision aids, not proof of seller intent, value, condition, or a completed professional review.

## Work through it

1. Record intake against the correct seller and Property. If a search or enrichment request partly succeeds, identify which records already exist before retrying.
2. [illegible] and property based on actual engagement and available facts. Use nurture [illegible]eferred but the relationship remains viable.

3. Once qualified, confirm the Opportunity and Property Transaction are connected to the same seller, Property, owner, and investment path.
4. Capture condition, valuation assumptions, intended strategy, responsible parties, title and lender context, inspection period, earnest money, target dates, contingencies, costs, and next action.
5. Create a separate Offer for each material acquisition proposal. Mark it sent or accepted only when that event has occurred through your organization's approved process.
6. At acceptance, compare the Offer, Opportunity, and Property Transaction for amount, parties, dates, financing, contingencies, title, and commissions. Assign deposits, inspections, documents, funding, and close work.
7. If the strategy includes a later sale or assignment, keep acquisition and disposition Offers distinct. Record each serious buyer proposal and retain unsuccessful proposals as history.
8. At close, record actual dates and amounts, final outcomes, parties, completed tasks, financial items, commissions, and attribution.

## Confirm the result

The Opportunity shows the true seller outcome, while the Property Transaction shows the current operating stage and links to the correct Property and Offers. Current acquisition and disposition terms are not mixed. Closed work includes actual amounts and dates, final Offer statuses, and owners for any remaining administrative items.

Financial settlement, commission approval, document indexing, attribution, and reporting may finish after the commercial close. Assign these items without leaving the deal in an inaccurate stage.

## If it does not look right

Verify the person, Property, Opportunity, and Property Transaction first. Identify the current Offer for the affected side, correct its status or relationship once, then wait for related updates before reviewing totals and reports. Preserve earlier Offers and failed contracts.

Do not recreate successful records or repeatedly change stages to force an update. That can duplicate Tasks, notices, financial items, or attribution. For a partial property request, resume only the missing step.

## Related guidance

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Use Offers, contracts, and closing for proposal controls and Transaction coordination for accepted-term execution.

Skip to content

RUN DEALS

# Retail buyer lifecycle

Guide a represented home buyer from qualification and property search through offers, contract coordination, closing, and relationship follow-up.

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## What this helps you do

Guide a represented home buyer from qualification and search through offers, closing, and follow-up. The Opportunity represents the overall buyer relationship. Each Property Transaction represents work for one candidate property, allowing unsuccessful attempts to remain visible without replacing the buyer's history.

## Where to work

Use the Contact and Opportunity for the client's identity, search criteria, owner, stage, and next step. Use the Property for facts about a candidate home. Create a Property Transaction when a property requires durable showing, offer, due-diligence, or closing work. Use an Offer for each material proposal.

## Before you begin

Confirm the client's communication preferences, agency relationship, target area, property type, budget, timing, must-have criteria, occupancy intent, financing method, lender or proof-of-funds status, and dependencies such as another sale or lease. Follow your organization's process for representation, disclosures, consent, and documents.

Search results, property data, and optional RAIN Intelligence are decision aids. Confirm current availability, condition, buyer priorities, financing, and professional evaluations through the normal process.

## Work through it

1. [illegible]'s needs and readiness. Use Appointment or Scheduling for the initial [illegible]turing when timing is deferred, and Showings & Offers only when active

property work begins.

2. Keep the Opportunity focused on the overall relationship rather than changing it to represent one address.
3. Create a Property Transaction when a candidate needs material due diligence, an Offer, or coordination. Connect the correct buyer Opportunity, Property, owner, and team.
4. For each serious proposal, create an Offer with the amount, financing, down payment, earnest money, inspection period, close date, expiration, contingencies, concessions, title and lender contacts, agents, and commissions.
5. Keep Offer statuses current and preserve rejected, withdrawn, cancelled, or replaced proposals as history.
6. When an Offer is accepted, confirm the accepted Offer and Property Transaction agree on the buyer, seller, Property, amount, financing, dates, contingencies, concessions, title, lender, and commissions.
7. Move to Under Agreement and Under Contract only when those business milestones occur. Assign deposits, inspections, financing, appraisal, title, documents, walkthrough, closing, and commission work.
8. Close or cancel abandoned property attempts while keeping their history. Keep only the intended contract active for closing.

## Confirm the result

The Opportunity accurately shows the buyer relationship and stage. Each candidate Property has its own Property Transaction and Offer history. The accepted property is clearly active, abandoned attempts have final outcomes, and close work has owners and dates.

Tentative or unsuccessful attempts may not affect Opportunity totals. Summary amounts and reports can also update after the source Offer or Property Transaction. At close, confirm the selected transaction and Opportunity are closed won, actual price and date are recorded, and commissions and required work are reconciled.

## If it does not look right

Confirm the buyer Opportunity, candidate Property, Property Transaction, and current Offer in that order. Correct the Offer status or relationship once, wait for updates to finish, then review summaries. If a contract ends, close the failed Offer and transaction before returning the buyer to ac[illegible]ure.

Do not copy one property's totals onto the Opportunity or repeatedly change stages. Before creating a replacement record, check all related attempts for the expected buyer, Property, owner, status, and date.

## Related guidance

Use Offers, contracts, and closing for proposal changes and Transaction coordination after acceptance.

RUN DEALS

# Retail seller lifecycle

Guide a represented home seller from intake and listing preparation through marketing, buyer offers, closing, and relationship follow-up.

## What this helps you do

Manage a represented homeowner relationship from appointment and listing preparation through marketing, buyer offers, closing, and follow-up. This path is for a retail listing, not an investment acquisition and resale.

## Where to work

Use the Contact and Opportunity for the seller relationship, owner, pipeline stage, and next step. Use the Property for address, condition, media, and valuation evidence. Use the Property Transaction for listing preparation, market status, parties, Offers, dates, and closing work. Each buyer proposal should have its own Offer history.

Listing status describes whether and how the home is available to the market. Opportunity and Property Transaction stages describe progress with the client and transaction. Keep both accurate.

## Before you begin

Confirm seller identity, ownership and occupancy context, the correct Property, communication preferences, agency relationship, condition, pricing goals, timing, showing constraints, known financing or liens, target close, marketing approach, and commission terms. Follow your organization's approved agreement, disclosure, consent, and document process.

Comparable analysis and optional RAIN Intelligence can support pricing conversations. Treat estimates as decision aids rather than appraisals or sale-price guarantees.

## Work through it

1. Use Appointment or Scheduling while arranging the consultation. Use Nurturing when the relationship remains valid but is not ready for active listing work.
2. Prepare the Property Transaction with the seller, Property, owner, team, pricing context, access, listing status, and next work.
3. Before launch, verify property facts, approved photos and Files, pricing, showing instructions, seller contacts, marketing plan, and material approved for external use.
4. Move to Listing & Marketing only when market preparation is active, and to Showings & Offers when buyer activity and proposals are active.
5. Record each material buyer proposal as a separate Offer. Include parties, amount, financing, earnest money, inspection period, expiration, contingencies, concessions, title and lender contacts, close date, agents, and commissions.
6. Keep unsuccessful or replaced Offers with accurate final statuses rather than overwriting them.
7. When the seller selects an Offer, verify it is the intended proposal and compare its terms with the Property Transaction and Opportunity.
8. Move to Under Agreement and Under Contract only when those events occur. Assign deposits, inspections, financing, appraisal, title, documents, contingencies, walkthrough, settlement, and commission work.

## Confirm the result

The listing status matches market availability, while the Opportunity and Property Transaction reflect actual business progress. The selected Offer is clear, current terms agree, and contract tasks have owners and dates.

At a successful close, the Opportunity and Property Transaction are closed won, the selected Offer is closed, the listing reflects the completed sale, and actual price and close date are recorded. Financial settlement, commission approval, delayed documents, attribution, and follow-up may finish later; assign them without leaving the commercial stage inaccurate.

## If it does not look right

If a buyer contract ends, give the failed Offer a final status, update the Property Transaction and listing status, then return the Opportunity to the appropriate active or nurture stage. Preserve the prior contract.

Fo[illegible]ns or stages, confirm the Opportunity and Property Transaction relationship ar[illegible]cted Offer. Correct the source event once, wait for related updates, then reconcile documents and totals. Do not repeatedly change listing or lifecycle stages, and do not create a second listing solely to reopen marketing.

## Related guidance

Use Offers, contracts, and closing for Offer history and replacement. Use Transaction coordination for accepted-contract work.

RUN DEALS

# Offers, contracts, and closing

Manage proposed terms, accepted-contract milestones, replacements, cancellations, and closing handoffs across every property lifecycle.

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## What this helps you do

Preserve each material proposal, identify the accepted terms, and hand an active contract into coordinated closing work. An Offer records one proposed set of terms. The Opportunity summarizes the client pipeline, while the Property Transaction organizes work for the specific property.

8020CRM records the business status selected by your team. Follow your organization's approved legal, document, review, and authorization process when deciding whether an agreement is effective or an obligation is complete.

## Where to work

Before creating an Offer, confirm the Opportunity, Property Transaction, Property, parties, owner, and direction. Direction explains who is proposing to acquire the property: the investing business, an investment buyer, a represented retail buyer, or a buyer making a proposal on a retail listing.

## Before you begin

Gather the amount, parties and entities, financing, down payment, earnest money, inspection period, target close, expiration, contingencies, concessions, costs, disclosures, title and lender contacts, agents, commissions, and approved documents. Required information can vary by transaction type and your organization's process.

## Work through it

1. Create an Offer when the proposal is important enough to preserve its terms and outcome.
2. ched to the intended Property Transaction and represents the correct side of

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3. Keep incomplete terms in a draft or working state. Mark sent only after delivery through the approved channel.
4. Mark accepted only after acceptance is confirmed and the accepted version can be identified.
5. At acceptance, compare the Offer, Property Transaction, and Opportunity for parties, amount, financing, earnest money, concessions, costs, commissions, dates, Property, access, documents, and known exceptions.
6. Assign coordination ownership and work for deposits, inspections, title, financing, appraisal, contingencies, documents, utilities, walkthrough, settlement, and communication.
7. For a counter or replacement, preserve the prior proposal and its outcome. Confirm only the intended current Offer supplies current terms for that transaction side.
8. If a contract ends, update the Offer outcome first, then the Property Transaction, listing status when applicable, Opportunity stage, and remaining Tasks.
9. Before close, compare accepted terms with approved settlement information and record actual amount, date, final costs, concessions, parties, documents, and commissions.

## Confirm the result

The selected Offer has the correct relationship, direction, status, milestones, and terms. The Property Transaction and Opportunity show the same current business outcome without erasing prior proposals. Acceptance has owners and dates for remaining contract work.

The Offer process is complete when the selected Offer has a final status, the Property Transaction and Opportunity have the correct outcome, and financial and coordination work has been handed to named owners. Invoices, commission approval, document indexing, settlement, and reporting may finish later.

## If it does not look right

Identify the lifecycle, transaction side, current Offer, and most recent valid business event. Correct the Offer's relationship or status once, save, refresh, and allow delayed updates to finish before editing mirrored terms.

If no Offer appears, confirm the Property Transaction, Opportunity, direction, amount, milestone information, commission context, and access before retrying. Do not overwrite an unsuccessful Offer or repeatedly change stages to force agreement; those actions can duplicate Tasks, notices, financial updates, or attribution.

## Related guidance

Use the relevant investment seller, retail buyer, or retail seller lifecycle for path-specific decisions. Continue with Transaction coordination after acceptance.

RUN DEALS

# Transaction coordination

Coordinate parties, dates, documents, tasks, access, exceptions, and closeout from accepted terms through final operational completion.

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## What this helps you do

Turn accepted terms into assigned, dated, and visible work. In 8020CRM, the Property Transaction is the operating center for the Property, Opportunity, current Offer, parties, team, activities, Files, milestones, financial details, commissions, and final outcome.

## Where to work

Coordinate from the Property Transaction. Use the accepted Offer as the source for proposal terms, the Opportunity as the client pipeline summary, and Tasks or an approved Action Plan for assigned work. A reminder or completed Task supports the process but does not prove that an external obligation was completed.

## Before you begin

Confirm the transaction type, Opportunity, Property, current accepted Offer, owner, coordinator, primary parties, and enough accepted terms to create a milestone plan. The handoff should include parties, approved documents, amounts, financing, earnest money, concessions, commissions, costs, key dates, access, occupancy, possession, utilities, and known exceptions.

Assign the responsible team and verify each person can access the records, Contacts, Tasks, and Files needed for their role. Keep financial and commission access limited to the appropriate users.

## Work through it

1. Compare the accepted Offer with the Property Transaction and Opportunity. Resolve differences in parties, terms, dates, or Property before building the plan.
2. [illegible]ation's approved Action Plan or checklist. Confirm its anchor date, task owners, [illegible]nd due dates; remove irrelevant work and add deal-specific exceptions.

3. Track contract intake, signatures or approvals, special terms, earnest money, financing, appraisal, inspections, repairs, contingencies, title, settlement, access, utilities, walkthrough, and close appointment as applicable.
4. Keep every Task's owner, due date, and status current. Record material decisions and approved Files in the shared transaction context.
5. When a milestone changes, update the authoritative date and review dependent work instead of shifting every date without review.
6. For an investment transaction, keep acquisition and disposition parties, Offers, dates, and amounts distinct. For a retail buyer, coordinate only the active accepted property. For a retail seller, keep listing status aligned with the actual market state.
7. At close, compare accepted terms with actual results. Confirm amount, close date, parties, documents, costs, concessions, commissions, and final outcomes.
8. Complete or intentionally cancel remaining Tasks. Give any post-close invoice, commission, document, possession, attribution, or follow-up item a named owner and date.

## Confirm the result

The current Offer has the appropriate final status; the Opportunity and Property Transaction show the correct outcome; actual amount and close date are recorded; parties and team are current; required Tasks are complete or intentionally cancelled; and approved documents are linked.

Commercial close can be immediate while administrative closeout continues. Final invoices, commission approval, settlement, document indexing, post-possession work, attribution, and client follow-up may update later. Track them explicitly without keeping the commercial stage inaccurate.

## If it does not look right

For a terminated contract, update the Offer first, then the Property Transaction, listing status when relevant, Opportunity, and task plan. Preserve completed history and cancel only work that no longer applies.

If records disagree, confirm their relationships and current Offer, then allow delayed updates to finish. Do not repeatedly change stages or generate a second plan to force progress. If a File seems missing, check related records before uploading another copy. If a teammate lacks access, correct access rather than duplicating information or changing ownership as a workaround.



## R nce

Use Offers, contracts, and closing for accepted-term and fallout controls. Refer to the applicable investment seller, retail buyer, or retail seller lifecycle for path-specific outcomes.

RUN DEALS

# Financials, commissions, and attribution

Maintain estimated and actual deal economics, compensation allocations, marketing attribution, and final reconciliation across property lifecycles.

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## What this helps you do

Use this workflow to keep deal estimates, actual results, compensation, and marketing attribution aligned. Summary values on an Opportunity or Property Transaction are useful for daily work, but the supporting Offer, financial lines, commission or ledger entries, Campaign relationships, and Expenses provide the detail needed for reconciliation.

## Where to work

Begin with the Property Transaction and its related Opportunity. The packaged Opportunity and Property Transaction pages can expose a **Financials** tab. Property Transaction actions can also expose **Products/Costs** for managing detailed lines. Open the current accepted Offer for final terms, then review the related financial, compensation, and Campaign records used by your organization.

## Before you begin

Confirm the correct Property Transaction, Opportunity, lifecycle, owner, and accepted Offer. Make sure approved financial templates, products, commission arrangements, and Campaign conventions are available to your role. Know whether a value is an initial estimate, current estimate, contract amount, or actual result before changing it.

## Work through it

1. Review proposed revenue, acquisition or sale amount, preparation, holding, financing, closing, concession, referral, and commission assumptions that apply to the deal.
2. Check whether 8020CRM is expected to create financial lines from an approved template. wner for generated Opportunity or Property Transaction financial lines. Avoid

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adding a manual duplicate simply because a generated line has not appeared yet.

3. In Products/Costs, select the intended product or cost, enter an amount, and use a quantity greater than zero. Save and confirm the retained line and updated totals.
4. Preserve the initial estimate when your process reaches its approval or underwriting milestone. Continue to maintain current estimates separately so variance remains visible.
5. At close, compare the accepted Offer and approved settlement information with each financial line. Confirm its amount, classification, Property Transaction, and estimated or actual state.
6. Review commission recipients, roles, basis, amount or percentage, and transaction side. If your organization uses ledgers, confirm the related allocations and approval state.
7. Review Campaign relationships and campaign-backed Expenses. Confirm the person, deal, qualifying dates, and spend are related correctly before interpreting attribution.
8. Allow expected rollups or reconciliation to finish, then compare the detail with Opportunity, Property Transaction, and reporting totals.

## Confirm the result

Closeout is complete when accepted terms match actual amounts and dates, financial lines are correctly classified, and estimates remain understandable. Commission or ledger items should be approved or assigned for later review. Campaign relationships and Expenses should be current, and summary totals should agree after the normal processing interval.

## If it does not look right

| Type of issue | Check first |
|---|---|
| Access or configuration | Your financial access, active products or templates, commission setup, and the organization's selected process |
| Record context | The accepted Offer, Property Transaction relationship, line classification, Campaign relationship, and qualifying dates |
| Delayed processing | Whether rollups or reconciliation are still completing before editing totals or retrying |
| Connected service state | Whether Campaign or expense information completed externally but has not yet reconciled in 8020CRM |

| Type of issue | Check first |
| --- | --- |
| Possible defect | A repeatable mismatch after access, configuration, source records, and expected processing have all been confirmed |

The Products/Costs workspace requires a valid Price Book and eligible products. A missing modal, empty product selection, zero quantity, or blank amount should be corrected before save. A successful message should be followed by checking the durable lines and summary totals.

Before retrying, refresh and look for existing lines, commissions, statistics, or updated totals. Correct the source detail first; do not create a duplicate record or edit a summary merely to force the expected number.

## Related guidance

See Reports, dashboards, and operational health to interpret the resulting metrics and Troubleshooting and safe recovery for a broader recovery sequence.

Skip to content

# Expenses, Campaign Statistics, and marketing performance

Record marketing costs, understand Campaign Statistics, and reconcile calculated outcomes to Campaigns, people, deals, and transactions.

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## Record Expenses consistently

Use **Add Expense** from the Campaign when available to preserve an actual cost, date, vendor or payee, and Campaign relationship. The action prefills Campaign context; Amount and Date are required. Define whether internal labor, platform subscriptions, media spend, list purchases, creative, postage, events, and other costs are included before comparing campaigns.

1. Open the intended Campaign and confirm its reporting period and owner.
2. Create or relate the Expense to that Campaign.
3. Enter the actual amount, effective date, vendor or payee, category, and description available in the configured layout.
4. Avoid combining unrelated periods or campaigns merely for convenience.
5. Save and confirm the **Campaign Expense Added** result, then verify that the Expense appears in the Campaign detail and reporting population.

Editing the Campaign, amount, date, or vendor/payee can request a statistics recalculation. Deleting an Expense can also require recalculation.

## Understand Campaign Statistics

Campaign Statistics summarize configured marketing outcomes such as leads, qualification, opportunities, contracts, dispositions or closings, and related cost measures. The exact metrics depend on installed fields, lifecycle mappings, date windows, and the selected automation owner.

Statistics can respond to Lead and Opportunity relationships, conversion, Property Transaction outcomes, Expenses, and scheduled reconciliation. They may not update in the same transaction as e.

Skip to content

**IMPORTANT**

Configure one intended owner for Campaign Statistics. Competing Flow and Apex ownership can produce repeated work or inconsistent timing.

## Reconcile a marketing measure

1. Identify the metric definition, source records, qualifying status or stage, and date field.
2. Open the Campaign and representative Campaign Members, Leads, Opportunities, and Property Transactions.
3. Confirm the Campaign relationship was present during the qualifying event.
4. Confirm Expenses use the intended Campaign and reporting period.
5. Allow event-driven or scheduled reconciliation to complete.
6. Compare detail rows before comparing formulas or dashboard totals.

## Common reasons totals differ

| Difference | Likely checks |
|---|---|
| Expense total is low | Missing Campaign relationship, wrong date, excluded category, access, or deleted record |
| Lead or opportunity count is low | Missing source Campaign, Campaign Member, conversion influence, date window, or qualifying lifecycle value |
| Closing outcome is absent | Property Transaction relationship, final stage or disposition, actual close date, and delayed reconciliation |
| Cost metric is unexpectedly high | Duplicate Expense, smaller qualifying population, period mismatch, or parent/child row duplication |
| Dashboard is stale | Dashboard refresh time, running context, report filters, and queued Campaign calculation |

Correct the source relationship, date, status, or amount. Do not create a duplicate Expense or manually alter a lifecycle outcome to force a statistic.

Skip to content

WORK EFFICIENTLY

# Action Plans, forms, and files

Use repeatable task plans, guided forms, and securely related Files to complete consistent work on 8020CRM records.

---

## What this helps you do

Action Plans, guided forms, and Files help teams complete repeatable work consistently. An Action Plan creates owned Tasks from an approved template. A guided form helps you update the correct business record. A File preserves supporting material with the record where colleagues need it.

## Where to work

Start from the Lead, Contact, Account, Opportunity, Property Transaction, or other business record for the job. Keeping the parent record in view helps prevent a plan, form response, or File from being related to the wrong customer or deal.

## Before you begin

Confirm the record type, owner, and current lifecycle state. For an Action Plan, select a template intended for that kind of record and confirm the proposed start date. For a form, verify that the displayed record and purpose match your work. Before uploading a File, confirm the approved audience, format, size, and handling requirements.

## Work through it

1. Start the Action Plan once from the correct parent record. Select the applicable template and review any available date, description, or owner inputs.
2. Open the created plan and review the Tasks currently available. Confirm each Task's subject, owner, due date, priority, reminder, and related business record.
3. Complete work from the Task. Closing a prerequisite may release a later Task, so refresh the plan before concluding that a dependent step is missing.

4. Open a guided form from the intended business record. Work through visible sections in order and complete all required values.
5. Recheck fields when a controlling answer changes. Sections or requirements may change to match the record's current context.
6. Review defaulted and calculated values, then save once. Reopen the business record to confirm the intended values were retained.
7. Upload supporting Files from the relevant record or form area. Confirm the title, category when used, related record, version, and audience. Add a new version when revising the same document instead of creating indistinguishable copies.

## Confirm the result

An Action Plan is ready when its currently eligible Tasks have the expected owners and dates. A step is complete when its Task is closed and any dependent work appears as expected. A form is complete when the business record shows the saved values. A File is complete when it opens from the intended record for an authorized colleague.

Some follow-on Tasks, guided processes, exports, and large File operations can finish after the first action returns. Their durable records, not the completion message alone, prove the result.

## If it does not look right

| Type of issue | Check first |
| --- | --- |
| Access or configuration | Template availability, record type, owner rules, form availability, field access, and File sharing |
| Record context | Parent record, current values, prerequisites, related record, and intended audience |
| Delayed processing | Newly released Tasks, follow-on records, exports, or File previews still completing |
| Connected service state | Any guided step that submitted work outside 8020CRM but has not yet returned a result |
| Possible defect | The same failure on comparable records after permissions, setup, context, and timing are confirmed |

Before retrying, look for an existing plan, Task, saved field value, related result, File, or File version. Retry only the incomplete step; creating another plan or uploading again can create duplicates.

## Related guidance

See AI assistance, suggestions, and automation for recommendations layered onto structured work and Troubleshooting and safe recovery for recovery checks.

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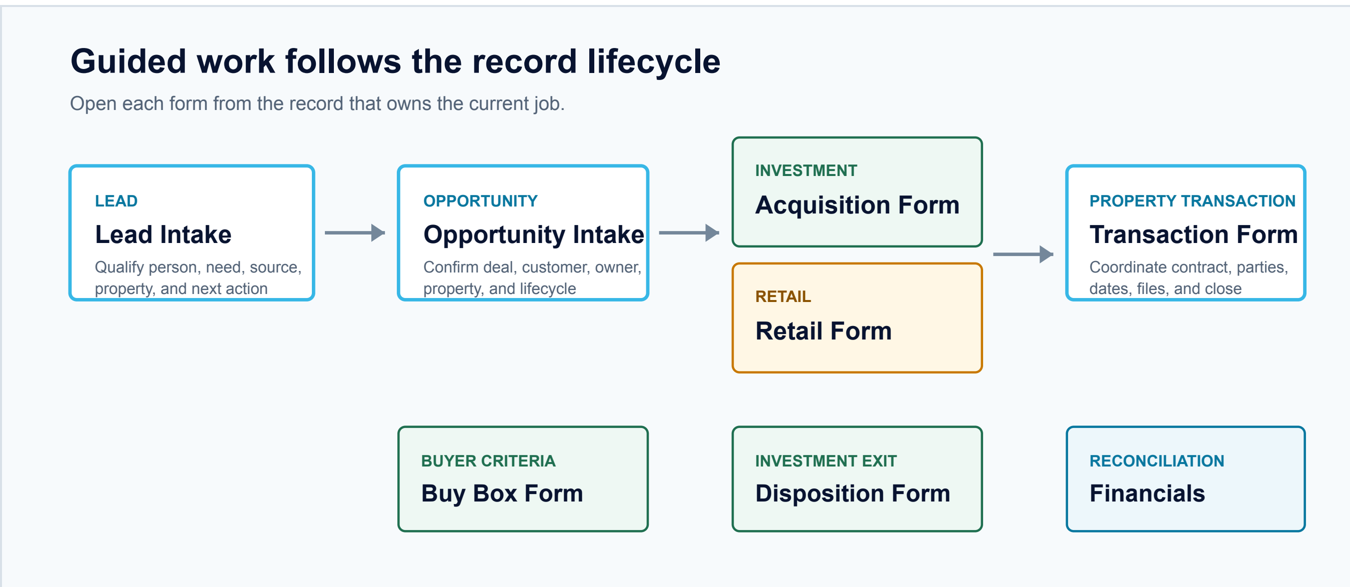
WORK EFFICIENTLY

# Guided forms by lifecycle

Choose and complete the Lead Intake, Opportunity Intake, Acquisition, Disposition, Retail, and Transaction forms from the record that owns the work.

## Choose the form that matches the job




| Form | Where users normally find it | Primary outcome |
|---|---|---|
| Lead Intake Form | Custom Lead page | Qualify early interest, contact context, need, source, property, motivation, condition, occupancy, financial, and follow-up information |
| Opportunity Intake Form | Opportunity lifecycle workspace under Lead | Carry qualification into the active deal and confirm customer, property, ownership, stage, and deal context |
| Acquisition Form | Opportunity lifecycle workspace under Acq | Evaluate an investment acquisition, including seller/property context, valuation, offer, terms, and acquisition milestones |
| Disposition | Property Transaction lifecycle workspace under | Prepare and manage buyer-facing disposition, pricing, marketing, offers, and disposition milestones |

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| Form | Where users normally find it | Primary outcome |
|---|---|---|
| | Dispo | |
| Retail Form | Eligible Opportunity or Property Transaction under Buy/Sell | Manage retail buyer or seller needs, representation, property, listing, offer, contract, and closing context |
| Transaction Form | Property Transaction lifecycle workspace under TC | Coordinate contract-to-close dates, parties, documents, conditions, responsibilities, and closing readiness |

Form availability can depend on record type, lifecycle, custom permission, page assignment, and device. The packaged Lead Intake placement is desktop-oriented. A missing form is often a visibility or configuration issue rather than missing data.

## Complete any guided form

1. Open the authoritative Lead, Opportunity, or Property Transaction and confirm its name, owner, record type, stage, and active Property.
2. Open the lifecycle tab that matches the job.
3. Review the existing values before entering new information. Defaults accelerate entry but are not proof that a value is correct.
4. Complete visible sections in order. A section or field can appear, disappear, or become required when a controlling answer changes.
5. Use lookups to relate existing people, properties, offers, or other records instead of recreating them.
6. Review calculated values and any proposed dates, amounts, or terms.
7. Save once and wait for the form to refresh.
8. Reopen the business record and related records to confirm what was retained and what follow-on work was created.
9. Create or confirm the next Task, Event, Action Plan, offer step, or transaction milestone.

## Lead and Opportunity intake

U[illegible]e the relationship is still being qualified. Confirm identity, communication in[illegible]and Campaign, market, active Property, need, status, rating, consent, and next action. Configured requirements include Need, Lead Source, Contact Type, and Record Type; conditional sections can introduce more requirements. Use Opportunity Intake after a deal exists to confirm the commercial and operational context. Do not maintain conflicting qualification facts on both records after conversion; use the current deal records and supported synchronization.

## Acquisition and Disposition

The Acquisition Form supports the seller-to-contract side of an investment deal. Work from the Opportunity and verify the linked Property and Property Transaction before relying on valuation, offer, or financial summaries. Primary Contact, Opportunity Owner, and the acquisition Offer Amount are important configured requirements. Creating the acquisition Offer relates it to the Opportunity and selected Property Transaction; verify both relationships after save.

The Disposition Form supports preparing and selling or assigning the acquired deal. Work from the Property Transaction and verify pricing, buyer-facing facts, portal and photo readiness, buyer prospects, offers, accepted outcome, and disposition milestones. A disposition Offer requires its amount; confirm the newly created Offer has the correct direction and relationships.

## Retail and Transaction Coordination

The Retail Form changes meaning with the record type and side. Confirm whether the record represents a buyer or seller before completing property, representation, listing, offer, and closing information. Owner and Offer Amount are configured requirements for relevant work.

The **TC** tab requires transaction-user access. Investment records use the Transaction Form; eligible retail records use the Retail Form in transaction-coordination mode. Keep proposal terms on the accepted Offer, supporting documents in Files, activities in Tasks and Events, and operational milestones on the Property Transaction. Cancellation choices and Offer amounts can introduce conditional requirements.

## Troubleshooting a form

| Symptom | Check first |
| --- | --- |
| Form or tab is missing | Application, Lightning page, record type, custom permission, profile, form factor, and lifecycle condition |

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| Symptom | Check first |
|---|---|
| Section is blank | Active template, record context, controlling values, field access, and related-record access |
| Field is unexpectedly required | Conditional rule, record type, controlling answer, validation rule, and base field requirement |
| Save fails | Required and allowed values, validation, duplicate rules, record access, related-record access, and later automation |
| Wrong record changed | Launch record, active Property, lookup selections, browser tab, and relationship shown in the form header |

Before resubmitting, refresh the authoritative record. Repair only the missing part when some values or related records already committed.

WORK EFFICIENTLY

# Buy Box, buyer matching, and prospecting

Record buyer criteria on the correct person or account, match eligible properties, and preserve buyer interest as traceable prospect and offer activity.

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## Use the Buy Box for durable criteria

The **Buy Box Form** appears on eligible Contact, Account, and Person Account pages. Use it to maintain the buyer's actual acquisition criteria, not the attributes of only one interesting property.

Criteria can include market or geography, property type, price or financial range, condition, strategy, bedrooms or units, timing, financing, and other configured preferences. Availability and exact fields depend on the installed definition and record type.

Some organizations can also expose an older Contact quick action named Buy Box that edits legacy buyer fields. Treat the current Buy Box record and Buy Box Form as the durable workflow unless the administrator has deliberately retained the legacy action.

## Maintain buyer criteria

1. Confirm that the Contact, Person Account, or Account represents the intended buyer and is not a duplicate.
2. Review existing criteria, activity, related Opportunities, Property Transactions, Prospects, and Offers.
3. Update criteria from the buyer's stated requirements; distinguish hard requirements from preferences.
4. Record readiness, timing, financing, communication eligibility, and responsible owner.
5. Save and reopen the record to confirm the criteria.
6. Run or wait for the configured matching process, then review results rather than contacting every returned record automatically.

## Work buyer matches from the deal

Skip to content

The **Buyers** tab on eligible Property Transaction pages supports buyer prospecting for disposition and seller-side work. A match is a candidate, not proof of fit. Review the buyer's current criteria, the property's current facts, prior outreach, restrictions, and existing Offers before acting.

When a candidate becomes active interest, preserve it in the supported Prospect, relationship, activity, or Offer record. Do not overwrite a buyer's durable Buy Box simply to force one property into the result set.

## Completion signals

Buyer setup is ready when the authoritative person or account has current criteria, an accountable owner, contact eligibility, and a next review point. Prospecting is complete for a candidate when the outreach or decision is recorded and any active interest is connected to the correct Property Transaction. An Offer, not a match score, proves proposed terms.

For eligible new buyer or investor Leads, automation can create an initial Buy Box. Reopen the Lead and verify the selected Buy Box relationship before creating another one.

## If matching looks wrong

Check the buyer record and Buy Box first, then the Property and Property Transaction facts, market normalization, record status, configured ranges, ownership, subscriptions, prior prospect records, and any pending recalculation. Broadening criteria can increase noise; correct inaccurate source values before changing the matching design.

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WORK EFFICIENTLY

# AI assistance, suggestions, and automation

Review RAIN suggestions and property-driven alerts, distinguish optional intelligence from standard automation, and apply AI-assisted changes safely in 8020CRM.

## What this helps you do

Use assisted suggestions to notice changes, review recommended next steps, and act from current 8020CRM context. The suggestion records the recommendation and your response; the Lead, Opportunity, Property, Property Transaction, Task, Event, or Communication records the business result.

RAIN OS provides the shared suggestion and action experience used by 8020CRM. RAIN Intelligence is optional and separately available. It may add advanced analysis, summaries, drafting, buyer assistance, or comparable support where your organization enables it. Standard assignment, status, Action Plan, and scheduled automation can operate without optional intelligence.

## Before you begin

Confirm that you can open both the suggestion and its related business record. Know which record owns the fact being proposed and whether your role may approve the change. External communications, valuation decisions, and legal, financial, or contractual changes should receive the human review required by your organization.

## Work through it

1. Open the suggestion or property-driven Deal Drop and note its related person, property, deal, owner, and generation time.
2. Open the related 8020CRM record. Compare the recommendation with current fields, recent activity, lifecycle state, and any updates made since generation.
3. Read the reason and supporting context. Treat a score, confidence, urgency, estimate, or generated text as decision support rather than proof.

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4. Choose the available response that matches your decision: apply or approve, snooze, dismiss or clear, or create follow-up work.
5. Before applying a field change, confirm the proposed value belongs on that record and does not overwrite newer information.
6. Before sending generated content, check the recipient, purpose, consent, factual accuracy, tone, confidential information, and sender details.
7. After acting, open the resulting business record, Task, Event, or Communication. Confirm the expected owner, due date, field value, or delivery state.

Snooze a valid item when the timing is wrong. Dismiss or clear an item that is no longer relevant. Do not change business data repeatedly merely to force another recommendation.

## Confirm the result

Review is complete when the suggestion has the intended response and the related record remains correct. An applied update is complete when the target value appears after refresh. Follow-up work is complete when the Task or Event exists. A Communication may move through submission, provider acceptance, and delivery at different times; verify the state required for the job.

## If it does not look right

| Type of issue | Check first |
|---|---|
| Access or configuration | Feature availability, placement, user access, record access, and whether optional intelligence is enabled |
| Record context | Eligibility, current lifecycle, owner, related records, saved search when relevant, and an existing or snoozed item |
| Delayed processing | Property evaluation, notifications, scoring, follow-up creation, or an approved action still completing |
| Connected service state | Optional service authorization and availability, plus Communication acceptance or delivery |
| Possible defect | A repeatable issue after current data, access, setup, existing output, and expected processing are confirmed |

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Refresh both the source record and the suggestion area before retrying. If part of an approved action already completed, retry only the missing action to avoid duplicate Tasks or Communications.

## Related guidance

See Action Plans, forms, and files for structured follow-up and Troubleshooting and safe recovery for incomplete actions.

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MEASURE AND IMPROVE

# Reports, dashboards, and operational health

Interpret lifecycle, transaction, financial, marketing, adoption, and service-health analytics with reliable definitions and recovery checks.

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## What this helps you do

8020CRM reports and dashboards help you review lead response, pipeline, property work, offers, closings, financial results, marketing, team activity, adoption, and recorded service usage. They summarize records available within a particular set of filters and access rules; they do not replace the underlying business records.

Use operational health reviews to answer two questions: whether customer and transaction work is progressing, and whether delayed or connected work is completing as expected.

## Before you begin

Define the question before interpreting a number. Confirm the population, date field, period, lifecycle values, owner scope, unit, filters, and expected refresh delay. Also note whether the dashboard uses each viewer's access or a designated running context, because that can change what different users see.

## Work through it

1. Refresh the dashboard and note the reporting period and data time.
2. Identify the records behind an exception by lifecycle, owner, stage, milestone, and age.
3. Open the source report. Check its filters, date field, grouping, and record population before comparing totals.
4. Inspect representative detail records. For pipeline, start with Opportunities and related Property Transactions. For contract measures, review Offer direction, status, and dates. For financial results, review accepted terms and supporting financial detail. For marketing, review Campaign relationships, qualifying outcomes, dates, and Expenses.

5. Distinguish the unit being counted. One buyer Opportunity can have several Property Transactions and Offers; one investment can have acquisition and disposition milestones. Counts of people, deals, properties, offers, and closings answer different questions.
6. Assign data corrections through the process that owns the source record. Do not change a stage, date, or amount merely to make a chart match expectations.
7. Recheck after expected synchronization, financial rollup, Campaign reconciliation, score, external update, or dashboard refresh has completed.

## Confirm the result

A review is complete when the metric definition and population are understood, users have appropriate access, and material exceptions have owners. Any expected delayed work should have a follow-up time. A persistent discrepancy should be traced to a source record, report definition, access difference, connected service, or support path.

Keep initial estimate, current estimate, contract amount, and actual result distinct. Treat Campaign attribution as the outcome of the organization's recorded relationships and rules, not proof that one Campaign exclusively caused a result.

## If it does not look right

| Type of issue | Check first |
| --- | --- |
| Access or configuration | Report and dashboard access, record visibility, available fields, folder sharing, and running context |
| Record context | Filters, dates, lifecycle, owner, Offer direction, relationships, and whether child rows repeat a parent |
| Delayed processing | Dashboard refresh, synchronization, financial rollups, Campaign reconciliation, or other queued work |
| Connected service state | Whether an external update completed, returned no result, or has not yet reconciled locally |
| Possible defect | A repeatable discrepancy after source records, definitions, access, configuration, and timing agree |

If two reports disagree, compare their detail rows before formulas. Before rerunning bulk or reconciliation work, confirm what already completed for each record. Never create duplicate financial or Campaign records to force a total.

If the report or dashboard is unavailable rather than incorrect, review Salesforce's Report and Dashboard Folders, folder sharing procedure, and sharing permissions. Folder access does not replace access to the report's underlying records and fields.

## Related guidance

See Financials, commissions, and attribution for financial source checks and Administration, integrations, and data governance for access and monitoring ownership.

MEASURE AND IMPROVE

# Report and dashboard catalog

Choose the right packaged analytics for lead, acquisition, disposition, retail, transaction, marketing, financial, adoption, and service-usage questions.

## Start with the business question

The packaged analytics library is broad. Choose a domain first, then select the report and period that answer the question. Names can include time abbreviations such as TD, CW, LW, MTD, QTD, and YTD; confirm the actual report filter rather than relying only on the name.

| Analytics area | Typical questions |
|---|---|
| Lead operations | New and uncontacted Leads, time to contact, conversion, source, appointments, activities, and overdue Tasks |
| Opportunity pipeline | Open pipeline, stage movement, next steps, win rate, contract rate, and expected economics |
| Acquisitions | Seller appointments, offers, contracts, acquisition amounts, agent production, and speed through milestones |
| Dispositions | Buyer activity, disposition offers, contracts, final outcomes, and responsible team performance |
| Retail buyers and listings | Buyer and seller pipeline, appointments, offers, contracts, closings, commissions, and listing activity |
| Transactions | Active files, milestones, overdue work, closings, transaction coordination, and financial completion |
| Marketing | Lead source, paid and unpaid response, Campaign outcomes, Expenses, conversion cost, and Campaign Statistics |
| Adoption and service usage | Login or activity adoption, configured API usage, communication usage, and operational exceptions |

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## Packaged dashboard families

Depending on installed capabilities and access, dashboards include:

- **Leadership Team Scorecard** for broad team performance.
- **Leads | Daily** and real-estate lead dashboards for daily intake and response.
- **Opportunity Stage and Next Steps** for pipeline attention.
- **REI Acquisitions**, **REI Dispositions**, and scorecards for investment operations.
- **Retail Leads**, **Retail Scorecard**, and retail daily views.
- **Campaign Statistics** and **Campaign Expenses** for marketing performance.
- **8020 Adoption Dashboard** and **Employee Engagement** for product and team adoption.
- **Deal Drops**, **Lost Revenue**, **Net Promoter Score**, and **API Usage** for specialized operational review.

Home shows selected dashboards according to role permissions. On desktop, use the App Launcher or locally added navigation items to open the standard Reports and Dashboards areas; they are not part of the packaged desktop tab order. The packaged mobile app includes Reports and Dashboards directly. Folder access is still required in either route.

## Use analytics safely

1. Confirm the dashboard refresh time, period, running context, and filters.
2. Open the source report behind a chart.
3. Verify the date field, grouping, lifecycle values, owner scope, and counted unit.
4. Inspect representative source records.
5. Assign corrections to the process owner and recheck after synchronization or refresh.

One customer, Opportunity, Property Transaction, and Offer can represent different counting units. Child detail can repeat a parent. Keep initial, current, contract, and actual amounts distinct.

## Access and troubleshooting

Folder sharing controls whether a user can open the analytics asset. Object, field, and record access control what rows and values the user can see. A dashboard running user can also affect the visible population. If two users see different totals, compare access and running context before ch

When totals conflict, compare detail rows and formulas, then review delayed rollups, Campaign reconciliation, and dashboard refresh. Never change customer or deal data solely to make a chart match an expectation.

ADMINISTER 8020CRM

# Administration, integrations, and data governance

Operate 8020CRM with controlled configuration, least-privilege access, accountable integrations, reliable data, and practical privacy safeguards.

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## What this helps you do

Administration keeps 8020CRM access, configuration, connected services, and business data aligned with your organization's operating and governance policies. This is ongoing work: users change roles, business processes evolve, providers change, and retained data grows.

## Before you begin

Name an accountable owner for access, business configuration, each connected service, data quality, privacy and retention, and operational monitoring. Retain the approved purpose, decision, test result, and review date for organization-wide changes. Keep credentials out of documentation and support notes.

## Work through it

1. **Review access by job.** Confirm each role has the necessary 8020CRM availability, field access, record visibility, page access, report folders, and connected-service authorization. Avoid broad access as a shortcut for one missing capability.
2. **Control configuration changes.** Record the current setting and intended outcome. Test lifecycle choices, routing, forms, markets, financial templates, and Campaign conventions with representative positive and negative scenarios before release.
3. **Keep one owner for each result.** When more than one configured process could create or update the same records, use the approved process only. Competing paths can create duplicate financial, Campaign, or other outcomes.
4. **Govern connected services.** For each service, document its business purpose, approved data, [illegible]d users, expected capacity, normal completion signals, retry authority, support

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route, and offboarding obligations. RAIN Intelligence is optional and requires separate availability and setup.

5. **Protect data quality.** Define which record owns each shared business fact and how duplicates, missing relationships, and corrections are handled. Correct the source record before changing copied or summarized values.
6. **Use controlled bulk changes.** Validate owners, record types, relationships, and allowed values. Test a small sample, record expected counts, allow delayed work to finish, and reconcile created, updated, skipped, and failed records.
7. **Apply privacy and retention rules.** Limit collection, access, exports, and disclosure to approved purposes. Follow data through Contacts, Properties, Communications, Files, exports, backups, providers, and downstream systems when responding to retention or deletion requirements.
8. **Review regularly.** Check inactive users, external access, failed or delayed work, recurring schedules, service usage, provider outcomes, duplicate trends, report access, unresolved exceptions, and privacy obligations.

## Confirm the result

A controlled change is complete when the approved configuration is active, representative users can complete the intended work, and surrounding lifecycle outcomes remain correct. Connected work may continue after a record saves; provider acceptance and final delivery can also occur at different times. Reconcile the initiating record, related records, delayed work, provider evidence, and analytics.

## If it does not look right

| Type of issue | Check first |
| --- | --- |
| Access or configuration | Availability, role assignments, record sharing, page and report access, feature choices, and one approved process owner |
| Record context | Record type, lifecycle, owner, required relationships, authoritative value, and duplicate rules |
| Delayed processing | Queued, scheduled, bulk, or reconciliation work still in progress |
| Connected service | Authorization, account or sender setup, capacity, provider acceptance, delivery, and valid no-result responses |

| Type of issue | Check first |
|---|---|
| Possible defect | A controlled, repeatable failure after access, approved setup, record context, provider state, and timing are verified |

Before retrying a connected or bulk request, identify whether it was never submitted, remains in progress, partially completed, or completed without local reconciliation. Repeating it can repeat a charge, message, export, or data change.

## Related guidance

Use Reports, dashboards, and operational health for recurring reviews and Troubleshooting and safe recovery for incomplete outcomes.

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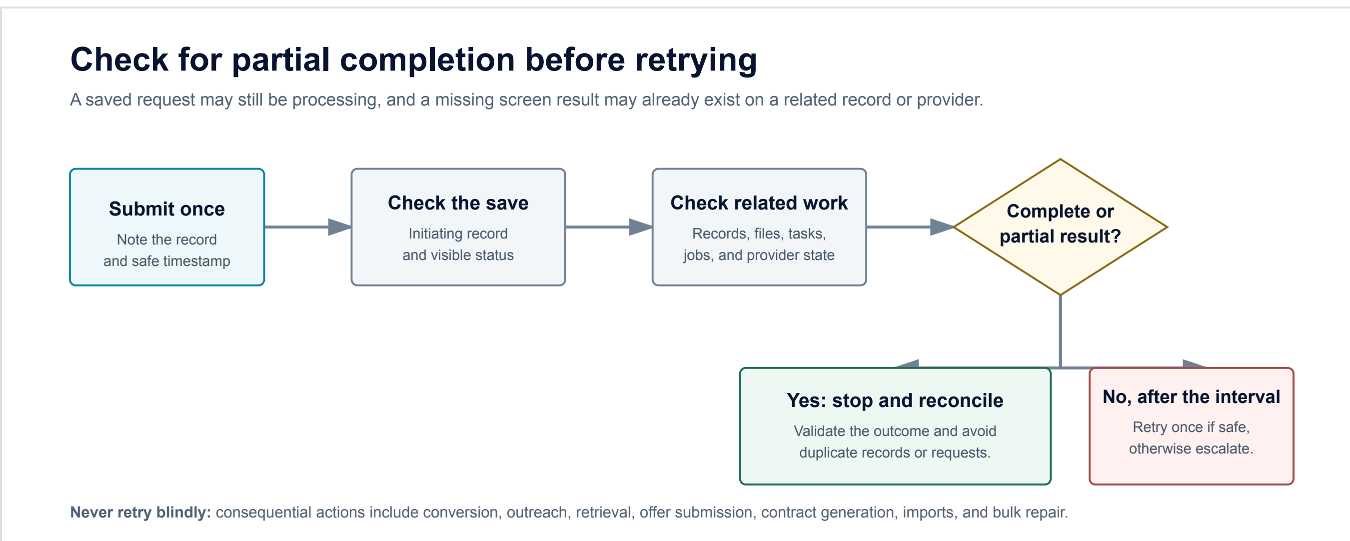
ADMINISTER 8020CRM

# Troubleshooting and safe recovery

Diagnose 8020CRM issues in execution order, recognize partial completion, choose safe retry points, and escalate with useful evidence.

## What this helps you do

Use this sequence when an 8020CRM result is missing, late, or incorrect. A single action can save a starting record, update related records, begin delayed work, and submit a connected request. A successful save does not prove every later step finished, while a slow refresh does not prove the action failed.




## Before you begin

Preserve the symptom before changing data. Note the intended task, affected record type and business context, expected result, first observed difference, approximate time and time zone, and whether the starting record saved. Record whether the issue affects one user, one record pattern, or all comparable work.

Do not include credentials, private message content, unredacted personal data, or broad production exports in support notes.

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## Work through it

1. **Confirm record context.** Check the intended record, record type, owner, lifecycle state, relationships, and the record that should own the business fact.
2. **Check access.** Confirm product availability, user permissions, field access, record sharing, page access, report folders, and connected-service authorization.
3. **Check configuration.** Review the applicable routing, form, market, mapping, product, Campaign convention, feature choice, and service setup.
4. **Confirm qualifying input.** Compare current and previous values with the business event expected to start the work. Check required relationships and allowed values.
5. **Inspect immediate results.** Review the starting record and any directly created or updated records. A visible save error normally belongs here.
6. **Inspect delayed results.** Allow queued or scheduled work to finish, then look for partial completion, overlapping updates, or records that still need reconciliation.
7. **Check connected service state.** Determine whether the request was sent, accepted, rejected, returned no result, remains in progress, or completed without the expected 8020CRM update.
8. **Check local business controls.** Consider organization-specific validation, duplicate handling, and other processes that affect the same records.
9. **Check analytics last.** Verify the source report, filters, dates, relationships, access, and refresh expectations.

Stop at the first boundary that differs from a comparable successful record. Later symptoms are often consequences of that first difference.

## Confirm the result

Before retrying, identify everything the first attempt created or changed. For intake or conversion, look for existing people, customer, deal, Property, and Property Transaction records. For an Offer, check whether it was created, marked current, or copied to related records. For Communications, check submission and provider state. For bulk work, identify committed and failed rows.

Correct the failed prerequisite or relationship, then resume only the incomplete step where supported. After recovery, review the surrounding record relationships, activities, financial and Campaign outcomes, and reports.

## If ook right

| Issue type | Safe response |
| --- | --- |
| Access or configuration | Compare with a working user or record one layer at a time; avoid broad elevation |
| Record context | Correct the authoritative record or missing relationship before any derived value |
| Delayed processing | Let active work finish and use a controlled, low-volume retry only for confirmed failures |
| Connected service or provider | Verify authorization, capacity, acceptance, delivery, and whether resubmission can duplicate a request or charge |
| Genuine defect | Escalate a repeatable issue with time, user role, anonymized context, steps, expected and actual results, and checks already completed |

## Related guidance

Use Record and terminology reference to identify the correct record owner and Administration, integrations, and data governance for controlled configuration recovery.

REFERENCE

# Record and terminology reference

Understand the durable 8020CRM records, lifecycle terms, relationships, ownership concepts, and processing states used across customer and property work.

## What this helps you do

8020CRM connects records for people, properties, deals, work, and outcomes. The same fact may appear in more than one place for convenience, but each record has a different purpose. Use this reference to choose the right record before updating data or troubleshooting a mismatch.

## Record reference

| Record | Use it for |
|---|---|
| **Lead** | Unconverted interest, early engagement, qualification, source, ownership, and nurture |
| **Contact** | A known person in an established customer relationship |
| **Account** | The customer, household, person, company, or other relationship container used by your organization |
| **Prospect** | A candidate for a particular transaction or approved outreach purpose |
| **Property** | The durable identity, location, description, media, and available data for a physical property |
| **Opportunity** | Pipeline stage, ownership, forecast, source, and customer-level deal progress |
| **Property Transaction** | Operational work for a specific property, including parties, dates, coordination, Offers, costs, and close |
| **Offer** | A durable proposal and milestone history for acquisition, disposition, buyer, seller, or listing terms |
| Skip to content | Assigned work or a completed action that does not reserve calendar time |

| Record | Use it for |
|---|---|
| **Event** | A meeting, appointment, call, or other scheduled activity |
| **Communication** | A supported call, text, email, or related communication with available submission and delivery states |
| **Campaign** | A marketing initiative connecting audiences, responses, spend, and resulting business |
| **File** | A document or media item stored and shared in the context of a record |

An Opportunity and Property Transaction can represent two views of the same deal, but they are not interchangeable. The Opportunity answers where the relationship sits in the pipeline. The Property Transaction answers what work is happening for a particular property. One buyer Opportunity may relate to several property attempts.

## Relationship and lifecycle terms

**Owner** is the user or queue accountable for a record. **Queue** holds eligible work for shared handling or assignment. A **team or role relationship** identifies how someone participates in a deal. **Primary** selects one relationship to represent a category. **Current** identifies the record that should drive present-day work without erasing history.

**Record type** selects a business variation. **Status** describes the state of a record or event. **Stage** describes pipeline or operating progress. **Disposition** is the selected handling or outcome strategy for a property-centered transaction. **Nurture** means a relationship remains relevant but is not ready for active progression.

Use the terminal outcome that describes what happened. Closed won, closed lost, cancelled, rejected, withdrawn, and similar outcomes preserve different business histories.

## Processing terms

| Term | Meaning |
|---|---|
| **Authoritative value** | The fact maintained on the record designated to own it |
|  | A copied, calculated, or summarized value maintained from another record |

| Term | Meaning |
| --- | --- |
| **Immediate processing** | Work that finishes during the initiating save, often with a visible error if it fails |
| **Delayed processing** | Work that begins from a save or schedule and completes later |
| **Partial completion** | Some intended results exist while others do not |
| **No result** | A valid request completed without a matching response |
| **Reconciliation** | Comparing source facts, related records, delayed work, connected-service evidence, and reports |

## Choose the right record

Use the Lead for qualification before conversion, the Opportunity for pipeline progress, the Property Transaction for property-specific operations, the Offer for proposal terms and milestones, and the Property for the physical asset. Use a Task for assigned work, an Event for reserved time, and a Communication for supported channel and delivery context.

When records disagree, correct the authoritative source and relationship first. Do not edit every visible copy. If values remain inconsistent after the normal processing interval, follow Troubleshooting and safe recovery.

## Related guidance

See Action Plans, forms, and files for work records and Financials, commissions, and attribution for financial source records.

REFERENCE

# Salesforce platform help and product boundaries

Know when to use 8020CRM guidance, when to use Salesforce Help, and how to diagnose a problem without sending it to the wrong support path.

## Choose the right source

8020CRM runs on Salesforce, so one user experience can involve both products. Use the 8020CRM guide for customer lifecycles, product workspaces, property and deal records, offers, financials, Action Plans, connected services, and 8020CRM automation. Use Salesforce Help for platform-owned behavior such as Chatter email preferences, Tasks and Events, permission assignment, record sharing, and report-folder sharing.

Start with the symptom, not the assumed owner. Confirm the affected record, user, time, and observed result. Then decide where the first failed boundary sits.

| Symptom | Start here |
| --- | --- |
| 8020CRM action, form, property result, Offer, or deal update is missing | The applicable 8020CRM workflow or troubleshooting article |
| Chatter post exists but no email notification arrived | Salesforce Chatter organization, user, sender, and email settings |
| Task or Event exists but appears differently in the timeline | Salesforce Activities and Activity Timeline guidance, then 8020CRM relationship checks |
| User can open 8020CRM but not a record, field, action, or report | Salesforce access and sharing controls plus the intended 8020CRM role |
| Report exists but the user cannot find its folder | Salesforce report and dashboard folder sharing |
| Connected message or data request is pending or failed | The 8020CRM article for that workflow and the configured provider boundary |

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## Use official Salesforce guidance

For Chatter notifications, see Chatter Email Settings and Branding and Chatter notification troubleshooting. Confirm the post and access before changing notification settings or posting again.

For Tasks, Events, and the timeline, use Activities: Tasks, Events, and Calendars and Manage Activities with Activity Timeline.

For user access, use Permission Sets, Permissions and Access Settings, and Sharing and Record Access Features. Do not grant broad access merely to test a missing button.

For analytics access, use Report and Dashboard Folders and Share a Lightning Report or Dashboard Folder.

## Confirm the handoff

When raising a case, state what has already been proven. Useful evidence includes the business task, user role, record type, sanitized time, whether the source record exists, whether another equivalent user succeeds, and the first boundary that failed. Do not include credentials, login links, access tokens, message contents, or unnecessary customer data.

Salesforce Help describes platform capabilities, but your organization's licenses, configuration, security model, and release can change what is available. 8020CRM guidance explains how the product uses those capabilities; it does not override Salesforce access or delivery controls.