RealScout

RealScout Quick Start Guide

Your 60-Day Blueprint for Turning Your Database Into Deals

From setup to success—work smarter with RealScout



What's Inside:

1	Setting Up For Success: The First 60 Days	04
2	Foundation Setup	05
3	Build Your Daily Habit	12
4	Scale with Templates and Auto-Nurture	14
5	Key Takeaways	17
6	Support Resources	18

You're all set up on RealScout...

...the question is: what next?

Whether you're a first-time user or looking to maximize your existing setup, you need to know which actions to prioritize when, and how to implement them effectively.

The difference between a dormant database and a reliable profit center?
A system that turns daily activity into closed deals.

Throughout this guide, you'll discover:

- How to set up for success in your first week (and what to do after)
- How to use AI Search to create buyer alerts in under a minute
- How to turn search templates into social media lead capture tools

From day one to deal done, this guide will navigate you through it all, helping you build workflows that deliver a better experience for your clients, and better results for your business.



Setting Up For Success: The First 60 Days

RealScout is a powerful platform for automated nurture and lead prioritization, but move too fast, and you may find yourself with a cluttered system that doesn't deliver results.

Before you start

Whether you're taking your first steps as a new agent or optimizing your existing RealScout setup, the same rules apply:

Define your 60-day objective.
Don't try to "work your whole database" at once. Pick one measurable goal:

- 5 buyer appointments, OR
- 5 seller consultations, OR
- 10 nurture conversations with your sphere

Get clear on your database reality.
How many contacts do you have? How many have phone numbers? Addresses? How many are actually emailable?

Understanding your starting point helps you set realistic expectations and celebrate real wins along the way.

Foundation Setup

Day 1: Account Activation

Goal: Get your RealScout account ready to represent you

✓ Do this now:

- [ ] Log into RealScout dashboard
- [ ] Complete the 4-step onboarding flow
- [ ] Upload professional profile photo
- [ ] Verify your contact information is correct
- [ ] Confirm your MLS data feed is connected
- [ ] Review your team logo placement

Why this matters:
Your photo appears on every email, every property alert, and every page your clients see. This is your brand. Make it professional.

Pro Tip:
The onboarding flow checks your email deliverability settings.
Follow those recommendations to ensure your alerts reach client inboxes.

Day 2: Download the Agent App

FROM YOUR PHONE:

1. Search "RealScout Agent" in App Store (iOS) or Google Play (Android)
2. Download the agent app (NOT the consumer home search app)
3. Log in with your RealScout credentials

Why this matters:
Get push notifications when clients request showings or send messages.
Respond from anywhere.

Day 3-4: Add Your First 10 Contacts

You have 3 ways to add contacts to RealScout:

Option 1: Connect an Integration (Recommended)

1. Go to left navigation → Automations → Integrations
2. Click "Connect an Integration"
3. Choose your CRM or lead source
4. Follow connection instructions
5. Contacts sync automatically going forward

Pro Tip:
Connect Zillow and Realtor.com even if you're not paying for leads. It doesn't hurt and ensures any future leads flow automatically.

Option 2: Import a Spreadsheet

Step 1: Download Template

1. Go to Contacts → Import Contact List
2. Click "Download Template"
3. Open the CSV in Excel, Numbers, or your editor of choice
4. Do not change the column headers - they must remain the same

Step 2: Add Contacts to File

1. Copy/paste your contacts into the template
2. Required field: Email (everything else is optional)
3. Recommended fields: First name, last name, phone, address
4. Save as CSV file type

Step 3: Set Auto Nurture & Upload File

1. Upload your CSV file (max 1000 rows per file)
2. Check "Auto Nurture my contacts" (optional but recommended)
3. Click upload

Pro Tip: Pro Tip - Two Ways to Bulk Setup:

Option 1: Auto Nurture with Addresses
If you include addresses in your spreadsheet AND check "Auto Nurture my contacts," RealScout will automatically create Home Value Alerts for those contacts. No manual setup needed.

Option 2: Tag-Based Template Assignment
Before importing, create a search template (like "First Time Buyer" or "Investor Deals"). Then add a "tags" column to your CSV with that template name. When you upload, all contacts with that tag will automatically be assigned that search. Perfect for bulk setup - import 50 buyers and they all get the same listing alert immediately.

Option 3: Add Individually

1. Click "Add Contact" button (top right of any page)
2. Enter basic information:
   - Name
   - Email (required)
   - Phone (recommended)
   - Address (if known - unlocks Home Value Alerts)
   - Source (how you met them)
   - Tags (buyer, seller, open house, etc.)
   - Contact type (buyer/seller/both)
3. Click "Create"

Pro Tip:
Start with your 10 warmest contacts - people who've engaged recently or who you know are actively looking. These will give you early wins.



Day 5-6: Enrich Contacts & Set Up Your First 3 Alerts

STEP 1: Enrich Your Contacts First

Before creating alerts, fill in missing contact information using Contact Enrichment:

1. Go to Contacts → Click on a contact name
2. On their contact record page, scroll to Contact Details tab
3. Look for "Enrich Contact" button
4. Review suggested data:
   - Phone number (for calls/texts)
   - Full address (unlocks Home Value Alerts)
   - Owner/Renter status
   - Length of residence (10+ years = seller lead)
5. Click checkboxes to accept data you want to add
6. Repeat for your first 10 contacts

Why this matters:
You can't call someone without a phone number. You can't send Home Value Alerts without an address. Enrichment unlocks all your nurture strategies.

STEP 2: Create Your First 3 Alerts

ALERT #1: Buyer with AI Search

1. From contact's profile page → Click "Add Listing Alert"
2. Choose "Create a brand new alert"
3. Select your MLS data feed
4. Click "AI Search" (left sidebar)

Enter a natural language prompt (example):
"Single family home in Birmingham and Hoover, 4 bed, 3 bath, $400K-$500K, must have pool, prefer open floor plan"

5. Review AI's work:
    - Check Core Requirements (beds, baths, property type)
    - Review Location filters
    - Look at Pricing Strategy (AI finds motivated sellers automatically)
    - Verify other criteria (parking, HOA fees, etc.)
6. Click "Save Search"
7. Name it (client sees this name - keep it professional)
8. Select contact to assign it to
9. Set frequency: Daily (sends up to 3×/week on match days)

Pro Tip:
The more details you give AI, the better the search. Include schools, neighborhoods, must-haves, and nice-to-haves. AI can find "motivated sellers" by scanning MLS remarks and price reduction history.

ALERT #2: Past Buyer - Home Value Alert (HVA)

1. From contact's profile page → Click "Add Home Value Alert"
2. Enter their property address
3. Choose creation option:
    - "Set up with defaults"
    - "Customize and preview"
3. Click "Save and Complete"

Why this works:
Home Value Alerts keep you top of mind with past buyers. When they're ready to sell, you're already in their inbox every month with value.

Pro Tip:
Hide the exact value and show only the range. Clients are more likely to click "Request Valuation Estimate" and reach out to you for the real number.

ALERT #3: Seller – Market Activity Alert

1. From contact's profile page → Click "Add Market Activity Alert"
2. Choose "Create a brand new alert"
3. Define the area:
   - Draw a shape on the map around their neighborhood
   - OR enter zip code, city, or county
4. Click "Preview Market Activity"
5. Name it (e.g., "Silver Spring Market Activity")
6. Select contact and frequency
7. Click "Save Market Alert"

The "nosy neighbor" angle:
Everyone wants to know what their neighbors' houses are selling for and how many buyers are looking. This alert feeds that curiosity and keeps you relevant.



Week 2: Build Your Daily Habit

Now that your first 10 contacts are set up with alerts, it's time to establish the daily habit that will drive your success.

Your Morning Routine

Log into RealScout Dashboard and review:

1. Contact Highlights (center of dashboard)

Three sections show you exactly who needs attention:

Most Engaged

- Contacts with highest Scout Scores (60–100)
- Green +numbers (score increasing)
- "Highly Engaged" badges
- **Action:** Call these people today

Recently Re-Engaged

- Contacts who went cold (30–90+ days) but are active again
- **Action:** Call within 24 hours - something changed

Slipping Away

- Contacts who were hot but activity is dropping
- Red negative numbers (score decreasing)
- **Action:** Reach out before they go completely cold

2. Live Feed

Real-time activity stream showing:

- Property views
- Properties they're interested in
- Properties they've hidden/trashed
- Messages sent
- Timeline answers
- Open house info clicks

Pro Tip:
Click on any activity to see the full details and take action immediately.



Scale with Templates and Auto-Nurture

Create Reusable Search Templates

Templates save you time and ensure consistency. Here are three to start:

Template #1: Open House Promo

1. Create search using AI Search: Properties similar to your listing
2. Click "Save Search"
3. Choose "Save as template"
4. Name it: "Open House [Address]"
5. Add tag: "Open House Attendee"
6. When attendees sign in, assign this template to them in bulk

Template #2: Investor Search

1. AI prompt: "Show properties with price reductions in [area], motivated sellers, 30+ days on market"
2. Save as template: "Investor Deals [Month]"

Template #3: First-Time Buyer

1. AI prompt: "Single family or condo, $200K-$300K, good schools, move-in ready"
2. Save as template: "First Time Buyer Starter Homes"

Turn Templates into Social Media Links

1. Go to Marketing → Search Links
2. Click "Create Search Link"
3. Choose your template
4. Customize:
   - Add public display name (what prospects see)
   - Upload attractive image
   - Add tracking tag (e.g., "Instagram Open House Ad")
5. Click "Generate Link"
6. Copy link and share to IG/Facebook

Real-world use:
Post to Instagram stories before your open house. Capture leads while you're busy showing the property. When they sign up, they're automatically assigned the search AND tagged with your tracking tag.

Understanding Auto-Nurture

Auto-Nurture is RealScout's set-it-and-forget-it automation that keeps your database warm without manual work.

What Auto-Nurture Does:

Based on the data in your contact's profile, Auto-Nurture automatically:

- Has viewed property? → Creates Listing Alert (based on zip, price, property type)
- Has address? → Creates Home Value Alert (monthly valuations)
- Has no data? → Sends email drip campaign to gather info

The result: Every contact gets relevant alerts without you building them manually.

How Auto-Nurture Gets Turned On

AUTOMATIC (No action needed):

- Zillow leads → Auto-activated by default
- Realtor.com leads → Auto-activated by default
- Website leads (if you've connected via Zapier) → Auto-activated

MANUAL (For existing contacts):

1. Go to Contacts → Select multiple contacts (check boxes)
2. Click "Auto Nurture" button above the list
3. Contacts are enrolled in Auto-Nurture drip campaign

OR for individual contacts:

1. Go to contact's profile page
2. Toggle "Auto Nurture" switch to ON

Pro Tip:
Read the Auto-Nurture documentation before enabling it
(Left navigation → Automations → Auto Nurture → "Learn More").
It's powerful but works best when you understand the full drip sequence.

Key Takeaways

RealScout is where automated nurture meets intelligent prioritization.

Understanding how to work the system efficiently and consistently is critical to turning your database into a profit center. Here are the 5 key components to keep in mind:

1. Start with 10, not 1,000 Define a clear 60-day objective. Pick 10 warm contacts to activate first. Build consistency with a small group before scaling to your entire database.

2. Enrich before you engage Contact Enrichment unlocks phone numbers for calls, addresses for Home Value Alerts, and owner intelligence for prioritization. Enrich first, follow up second.

3. Use Contact Highlights as your command center Most Engaged = call today. Recently Re-Engaged = call this week. Slipping Away = save now. This dashboard tells you exactly who needs attention and when.

4. Let Scout Score tell you when to act Scout Score (0–100) automatically prioritizes your hottest leads. Focus your time on contacts with scores 60+.

5. Build a daily habit, not a monthly sprint 15 minutes every morning beats 2 hours once a month. Consistency wins deals. Sprints create burnout.

Support Resources

Need help?

Support:	support@realscout.com 650-397-6500
Help Center:	Click your profile icon → **Support** OR blue button (lower right corner)

Help Center has tutorials on every feature

Weekly Training:	RealScout Basic Training Webinar

RealScout