

Daily Text & Tag Guide

What happens each evening, and what to do when you get the text

WHAT HAPPENS DAILY

Every day around 6:00pm, you'll get a text message listing the clients you saw that day. Each name is a tap-able link — no app to install, no login required.

1. You get a text

One text per day, listing every client you had that day. Each name has its own link.

2. You tap a name

Opens a simple page in your phone's browser — no account, no password. Just the client's name (and their buyer's agent, if we know who that is).

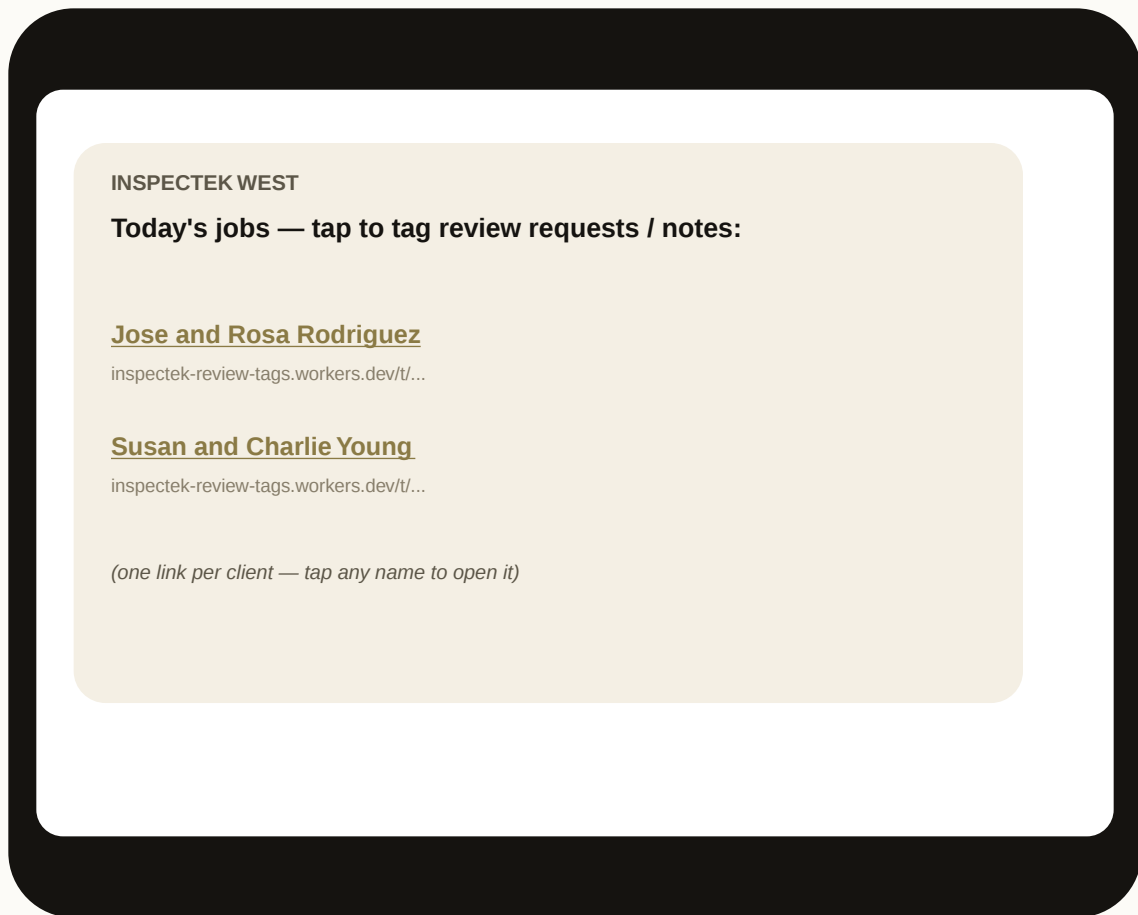
3. You check boxes for what applies

A short list of tags — check whatever fits this client (and their agent, if shown). You can check more than one, or none at all if nothing applies.

4. You hit submit — that's it

The tags get applied instantly. You can close the page. Nothing else to do.

Same client showed up on more than one calendar (team job)? Only one of you will get the link for that client — this avoids the same person getting tagged twice from different inspectors.



Tap any name in the text to open that client's page. If you have several clients that day, you'll see one link for each.

WHAT THE PAGE LOOKS LIKE WHEN YOU TAP

Opens right in your phone's browser. You'll see the client's name, and their buyer's agent if we have one on file, each with their own set of tags.

CLIENT

Jose and Rosa Rodriguez

- ☐ Send review request
- ☐ Don't send review request
- ☐ Backflow noted (irrigation) — follow up spring 2026

BUYER'S AGENT

Sarah Hesselman

- ☐ New buyer's agent
- ☐ New lead
- ☐ Repeat buyer's agent
- ☐ Send review request

Apply tags

WHAT EACH TAG MEANS — CLIENT

Send review request

Ask this customer for a review. Use this when the job went well and they seemed happy.

Don't send review request

Skip the review ask for this customer — e.g. the job was rocky, or they asked not to be contacted.

Backflow noted (irrigation) — follow up spring 2026

You spotted an irrigation system at this property. Flags it so the office can reach out once backflow testing is back up and running.

WHAT EACH TAG MEANS — BUYER'S AGENT

New buyer's agent

This is the first time we've worked with this agent.

New lead

Could be a new referral relationship worth the office following up on.

Repeat buyer's agent

An agent we've worked with before.

Send review request

This agent may want to leave a review too — check this if it feels appropriate.

Not sure which tags apply, or none feel right? It's fine to leave everything unchecked and just hit submit — or skip the link entirely. Nothing bad happens either way.