

Software Functions and System Setup

90-Day Seller Appointment Implementation Kit

Version 1.1 | Last Updated October 2, 2026

Purpose: Map your existing tools to the required functions without replacing a working stack.

Requires: 90-Day Seller Appointment Roadmap Plan; Existing software access; Seller Campaign Compliance Checklist Initial data and contact rules

When to use: Before building forms and automation

Estimated time: 60–90 minutes to map; connection work in CRM Automation and Connection SOP

[Open the Resource Hub](#)

Customize before using

Replace the fields used in your selected template. Use [AGENT NAME], [BROKERAGE], [CITY], [COUNTY] or [NEIGHBORHOOD], [SELLER OFFER], verified [LOCAL MARKET DATA], [BOOKING LINK], [PHONE] and [EMAIL] consistently. Complete any additional bracketed delivery, privacy, property or review fields that apply. Delete instructions and unused alternatives before sending.

Choose functions first

Recommended starting approach: retain your existing CRM and website if they support the checks below. Vendor examples are practical options, not a demand to buy a new plan. Confirm feature access and integration support in your actual subscription before committing. The kit contains no vendor pricing assumptions.

Function	Required behavior	Recommended option	Alternatives
Landing page and form	Mobile page, labelled fields, successful-submit response, routing, privacy link	Existing website builder plus its connected form	HubSpot page/form tools; a dedicated funnel builder
CRM	Stable opportunity IDs, stage dates, source, tasks, permissions and suppression	Existing real estate CRM	HubSpot contact/task system; another CRM meeting these functions
Calendar	Conflict check, seller timezone, notifications, reschedule/cancel	Existing CRM calendar if it passes tests	Calendly connected to Google or Microsoft calendar
Email	Delivery, reply handling, scheduled nurture, exits, unsubscribe	Existing CRM email automation with required features	HubSpot marketing email with the appropriate subscription; dedicated email provider
SMS Optional	Recorded consent, registered sender, quiet hours, opt-out, state review	Existing reviewed SMS provider	Another provider passing Seller Campaign Compliance Checklist; keep off

Function	Required behavior	Recommended option	Alternatives
Tracking	Successful-submit event, campaign/ad source, deduplication, CRM outcomes	Meta dataset/Pixel plus CRM source fields	Permitted server integration/Conversions API plus browser measurement
Connection	Reliable create/update and status events; error alert and safe retry	Native integration where it meets CRM Automation and Connection SOP	A connector/webhook service; documented manual fallback
Resource hosting	Stable HTTPS link to actual PDF with access suitable for homeowners	Existing website file hosting	Your approved file-hosting service

LAST VERIFIED: October 2026. Confirm required functions in your current subscription before choosing a tool.

SOURCE: <https://www.hubspot.com/products/crm>

SOURCE: <https://knowledge.hubspot.com/forms/form-automations>

SOURCE: <https://calendly.com/help/connect-your-calendar-to-calendly>

SOURCE: <https://www.facebook.com/business/help/AboutConversionsAPI>

Fill in your system record

Agent [AGENT NAME] Brokerage [BROKERAGE] Service area [CITY] Property scope [TYPES]

Owner [NAME] Backup [NAME] Business hours [HOURS / TIMEZONE]

Website/form [TOOL AND URL] CRM [TOOL] Resource link [URL]

Email sender [EMAIL] Reply owner [NAME] Calendar [TOOL / URL]

SMS [OFF / REVIEWED PROVIDER] Retargeting [OFF / APPROVED SETUP]

Dataset [ID] Reporting timezone [ZONE] Campaign start [DATE]

Risk budget [USD] Outage notification [ROUTE] Manual backup [PROCESS]

CRM stage and timestamp map

Store RAW LEAD, QUALIFIED SELLER OPPORTUNITY, APPOINTMENT BOOKED, APPOINTMENT HELD, and LISTING WON separately. Use first-stage timestamps for the funnel. An appointment attempt has its own ID and scheduled time; rescheduling updates attempts without creating a new unique seller. Minimum fields: opportunity ID, source/campaign/ad ID, captured date, qualification date/reason, first-booked date, first-held date, signed-listing date, closing date and actual GCI if known, email/SMS permission and suppression, next task and owner. Keep property details securely in the CRM, not campaign URLs.

Tracking event map

Page view: a permitted page load, never a raw lead.

Lead: one valid accepted contact submission, deduplicated to the logical submission/opportunity.

Qualified: human or verified rule confirms Seller Qualification Form criteria, with timestamp.

Booked: calendar confirms an actual scheduled qualified conversation; first booking per opportunity.

Held: agent records actual attendance and substantive conversation after it occurs.

Listing won: signed listing agreement recorded. Closing and actual commission are separate.

Use CRM outcomes for the target. Meta-attributed totals may differ from CRM totals because of attribution and matching; reconcile the scope rather than forcing equality.

Required connection order

Resource hosting and form → CRM record → delivery and task → qualification paths → calendar → reminder state → outcome recording → tracking reconciliation → campaign activation.
Build and test the core connections with CRM Automation and Connection SOP before the platform walkthrough Meta Campaign Setup Checklist.

Separate optional Calendly walkthrough

LAST VERIFIED: October 2026. Confirm current menus and features in your account.

SOURCE: <https://calendly.com/help/connect-your-calendar-to-calendly>

In the current calendar connection area, connect the agent's supported calendar. Select calendars to check for conflicts and the calendar that receives events. Configure the Booking Page Template event title, duration, location, available windows, and required questions using the current event editor. If your plan lacks a required automation, use your CRM or a tested connector for that function. Use CRM Automation and Connection SOP to verify one booking, one reschedule, one cancellation, and timezone behavior. Core Booking Page Template instructions work with other calendar tools.

You are done when

Every required function has one owner and a tested implementation; optional SMS and retargeting are explicitly enabled or disabled.