

How to Use the Auto Email Feature

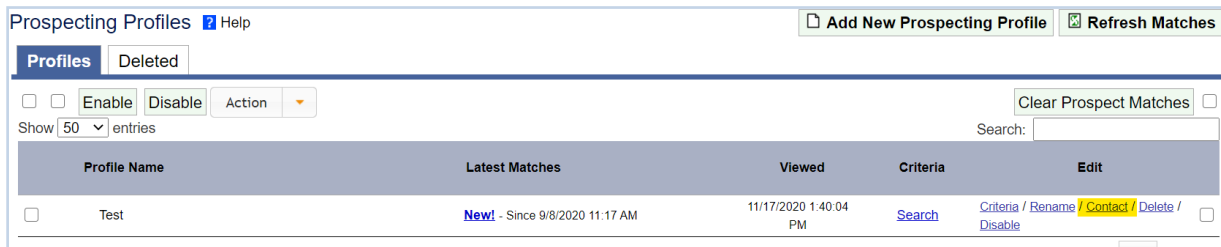
With our Auto Email Feature you are now able to setup automatically generated emails of listings that match your saved criteria to your clients as a portion of our Prospecting Module on RMLSweb.

Below you will find instructions for using this tool. If you have any questions please contact our Help Desk at 503-872-8002 or toll-free at 1-877-256-2169 outside of Portland.

Using Auto Email

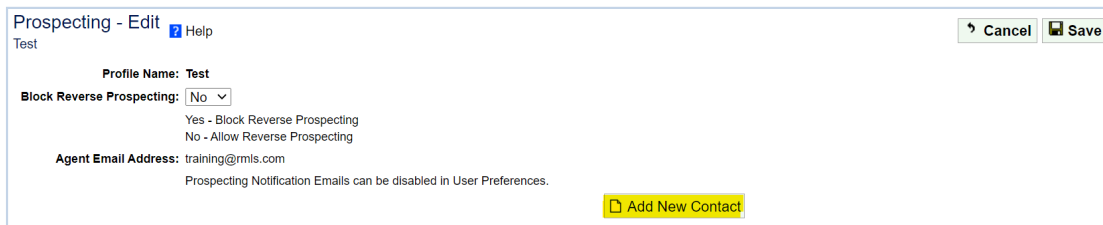
To use Auto Email, you must first have a Prospect Profile which includes the ACT, BMP, SSP, PEN, POP, SLD, SNL and/or SSP status. *Note: the inclusion of CSN (Coming Soon-No Showing) status in your profile will inactive auto email.*

- Create a new Prospect (for details watch the Creating a Prospecting Profile Tutorial):
After choosing your search criteria, click Save As. Next, in the dialogue box that opens enter a name for the saved search and click OK.
- Existing Prospect:
Find the Prospect in your Prospecting profiles then click on the contact link in the edit column.

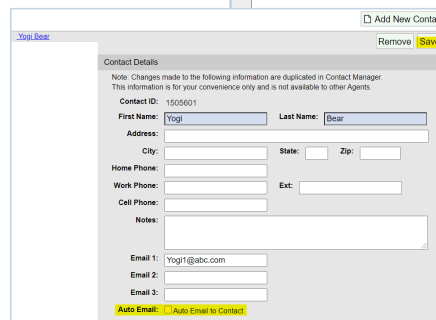
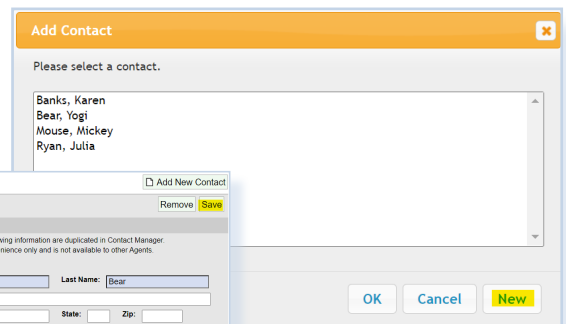


In this page:

1. In the new window you will have the option to Block Reverse Prospecting. Select Yes or No and then click Add a New Contact in the lower right-hand corner



2. A new dialogue box will open and allow you to either:
 - a. Choose a Contact from your Contact Manager by selecting the name of the Contact and clicking OK. If you use an existing Contact for this Prospect Profile be sure that they have a valid email address.
 - b. Or you can also create a new Contact by clicking New.



- i. Enter the Clients contact information
Note: you can up to 8 contacts per prospect profile, simply click the save button in the entry form then Add New Contact again.

3. At the bottom of the Contact Information input form, click the checkbox next to Auto Email to Contact. This will allow the Auto Email portion of the Contact Information form to appear.

4. Complete the form

a. The first time you check the auto email box your client will be automatically enrolled to receive Auto Emails. You can Enable or Disable this feature for this Contact in the future by clicking the box next to Enabled.

b. You may also select the email delivery day or days and the frequency per day by clicking on the appropriate check boxes. Click the All check box for delivery every day of the week.

i. Note: The listings you receive are cumulative from the last delivery.

For example, should you request delivery every Friday, you will receive all of the listings from a previous Friday through to the current date, rather than new listings for Friday only.

c. If you would like to receive a copy of every Auto Email that your client receives you will want to click the box next to "Send me a copy." However, you will also be able to see a history of all the automatically sent emails through Prospecting or Contact Manager. We'll talk more about this later.

d. Next, you will want to choose the type of report your client will see when they get the email.

The default is set to Client Full, but by clicking the arrow to the right of Report you will notice that there are six different reports to choose from.

e. If you would like your contact information to appear at the top of the report click the box next to Banner. The information that will be posted in your banner comes from the information in your Report Banner. To edit or view your Report Banner, scroll over Toolkit, then select User Preferences.

Auto Email Information

Please note the following parameters for Auto Email:

- Multiple emails could be sent daily.
- Only ACT, BMP, SSP, PEN, SLD, SNL and POP listings will be available for viewing.
- Only the top 100 matches will be available for viewing.
- Links to listings are only available for 30 days or 100 viewings.
- Any properties currently on RMLSweb that match this profile will not be included in the first auto-email. RMLS™ recommends running an initial property search and sending matches to the client. Auto-emails will then capture any new properties listed after the client has been set up for this service.

Status:

Enable/Disable: Enabled

Email Days: ALL MON TUE WED THU FRI SAT SUN

Frequency: Multiple per day Once per day

CC: Send me a copy

Report: Client Full

Banner: Show Banner in header of report

Email Subject:

Email Text:

Signature: Append your signature to email body

Report: Client Full

Banner: Client Full

Email Subject: Client Full - Rate Plug

Email Text: Client Medium

Comparison

Buyer Tour Map

32 Up Photo Report

Trainer Julia
Subscriber Relations
Rep.
RMLS

3510 NE Edenbower Blvd.
Roseburg OR 97470

[RMLS Public website](#)

Phone: 541-673-3571
Cell: 541-464-7601
Fax: 541-673-6581
E-mail: Julia.r@rmls.com

[My website](#)

f. A subject line for the email is required, so type that in the space provided. Remember, this will be the subject for every Auto Email sent to this client until you come in and edit it. This holds true for the Email Text as well. It is also a good idea to let the client know what this subject line will be so they can recognize it is safe to open.

- g. While you may enter text in the following box, Email Text, please be aware that this text will appear in every Auto Email sent to this client, just like the subject. Also note, the following text from RMLS™ will also always appear in every Auto Email: “To see the newest matches from RMLSweb click here. For a complete list of available matches click here.”
- h. When finished entering all the information, click the Save button all the way at the top of the page.

Prospecting - Edit Cancel Save

Test

Profile Name: Test

Block Reverse Prospecting: No

Yes - Block Reverse Prospecting
No - Allow Reverse Prospecting

Agent Email Address: training@rmls.com

Prospecting Notification Emails can be disabled in User Preferences.

Add New Contact

[_Yogi_Bear](#) Remove Save

Auto Email History

If you didn't sign up to be copied on every automatic email that your client receives from RMLSweb, but need to see one that was sent to them because they have a question, you can view the history on RMLSweb. The easiest way is through the Prospect Profiles page. Once you find the Prospect Profile, you should see the Contact below the profile. In the center you will see a link to the Last Email and to the right you will see a History button which will show you past emails sent.

Prospecting Profiles Add New Prospecting Profile Refresh Matches

Profiles Deleted

Enable Disable Action

Show 50 entries Clear Prospect Matches

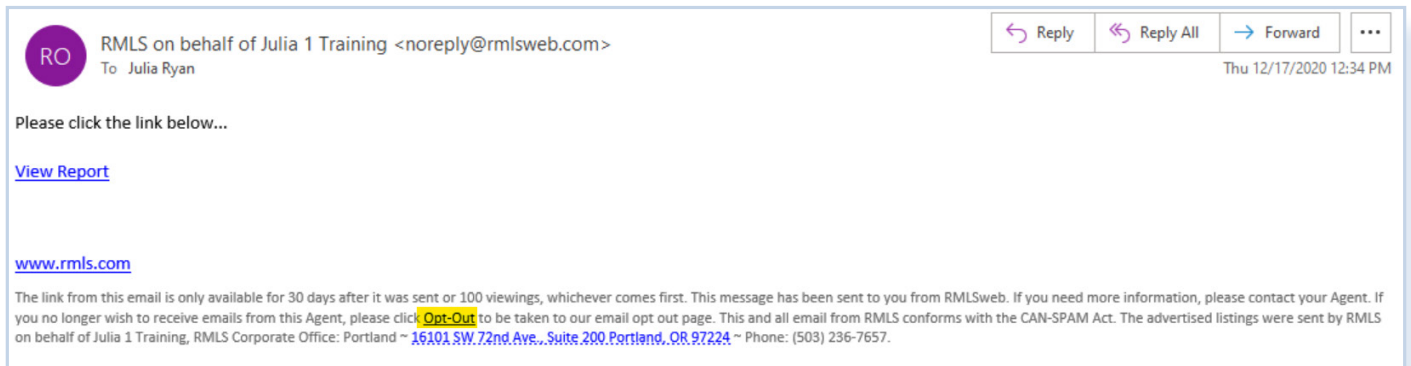
Profile Name	Latest Matches	Viewed	Criteria	Edit
<input type="checkbox"/> Another Prospect class	None - Since Today 12:12 PM		Search	Criteria / Rename / Contact / Delete / Disable
<input checked="" type="checkbox"/> Yogi_Bear	Total Emails Sent: 3 / Last Email (Time: 12/7/2020 12:15 PM) 1 Listing(s) Sent in Last Email	Expires On 5/21/2021		Delete / Disable / History

Opt In or Out

CAN-SPAM Act requires we give the ability for email recipients to opt out of receiving emails from a particular agent. By clicking the Opt Out link at the bottom of their email and confirming their decision when prompted by the system, a recipient can choose to disallow a particular agent to email them through RMLSweb. (Note: Other agents will still be able to email them).

This applies to both manual and Auto Emails, and applies regardless of whether they are being sent email as a Contact or whether their email address has been typed manually by the agent.

When a recipient opts out from an agent, it also opts out any Contact they are a part of. So, for example, if Adam, Betty, and Carl are on one Contact and Carl opts out, Adam and Betty will no longer receive Auto Emails from Prospect Profiles linked to that Contact.



The Contact will also be unavailable for selection in the drop-down list when choosing a Contact to email manually. Adam and Betty will still receive emails related to other Contacts they may be associated with or when their email addresses are typed manually.

The opted-out contact can be re-enabled if Carl opts back in, or if the agent edits the Contact by removing Carl's email address from it.

Tips and Information:

- The link to the report the client receives, will only be available for 30 days or 100 viewings, whichever comes first.
- Check your User Preferences, agents must have a valid email address in their user preferences for auto-email to work.
- Auto email profiles expire six months after it is created, the Auto Email profile becomes disabled (i.e. it stops sending emails). The Auto Email profile's expiration date can be reset by editing the Auto Email details. Simply go into the Prospecting/ Prospect Profiles screen, click on "Contact" and then hit save at the very top. This will also extend the Auto Email expiration date
- Auto Email profiles are associated with Prospect Profiles, and the matches that are sent are the ACT, BMP, SSP, PEN, SLD, and SNL listings that matched the prospect criteria from the time the Auto Email profile was created, enabled, or last ran to the time the email was generated. Additionally, listings that become EXP, WTH, or CAN will disappear from the match list -- so if the client views the matches twice and they don't all show up the second time, that is likely why.

As always if you have any questions please contact our Help Desk at 503-872-8002 or toll-free at 1-877-256-2169 outside of Portland.



Document #: **1737**
Revision Date: **12/17/2020**
Pages in File: **4**
Help Desk: **503-872-8002 or toll-free at 1-877-256-2169**