

## Auto Emails

### Auto Email – What is it?

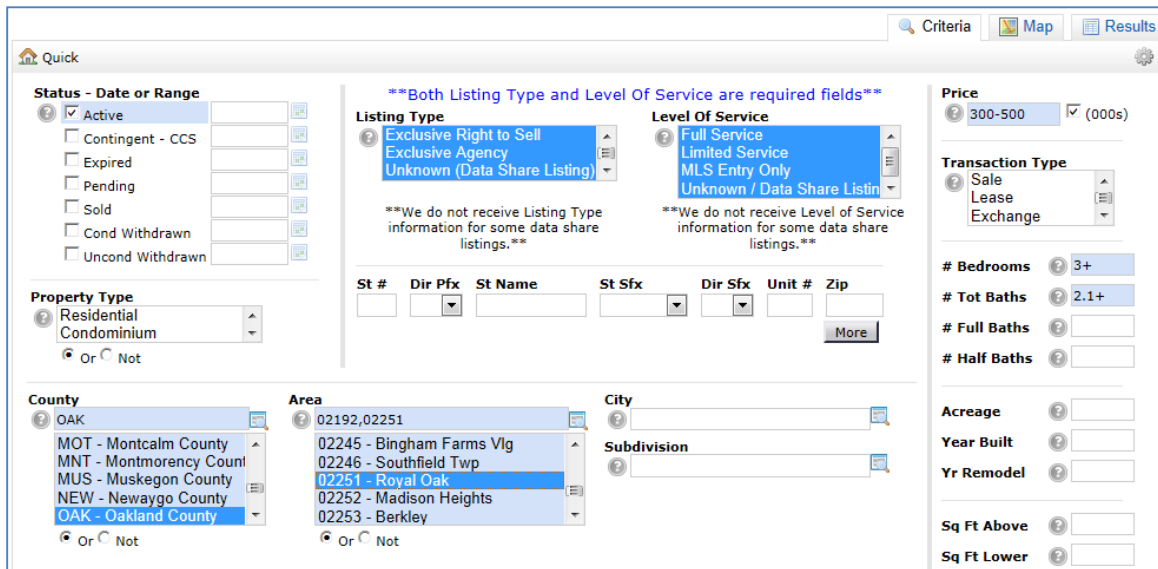
Auto email allows you to set up a saved search to automatically email new listings and listings that have changed in status or price to a contact. RCO3® will send them out as soon as they are entered into MLS, if desired. As a result, your contact will receive up-to-date listings based on the email schedule that has been set up.

**Note:** There is a limit of 250 listings that can be sent per email.

### Setting up an Auto Email

To set up a new auto email, follow the steps below.

1. Click on the “Search” Tab
2. Click on the Residential Quick link (If setting up Commercial or Vacant land click on the corresponding Quick link)
3. Enter in all criteria for which your client is looking. (Example: Active, Birmingham and Royal Oak areas, \$300-500, 4+ beds and 2.1+ baths)



The screenshot shows the RCO3 search criteria interface. It includes sections for:

- Status - Date or Range:** Active (checked), Contingent - CCS, Expired, Pending, Sold, Cond Withdrawn, Uncond Withdrawn.
- Property Type:** Residential (selected), Condominium.
- County:** OAK (selected), MOT - Montcalm County, MNT - Montmorency Count, MUS - Muskegon County, NEW - Newaygo County, OAK - Oakland County.
- Area:** 02192,02251 (selected), 02245 - Bingham Farms Vlg, 02246 - Southfield Twp, 02251 - Royal Oak, 02252 - Madison Heights, 02253 - Berkley.
- City:** (empty field)
- Subdivision:** (empty field)
- Listing Type:** Exclusive Right to Sell, Exclusive Agency, Unknown (Data Share Listing).
- Level Of Service:** Full Service, Limited Service, MLS Entry Only, Unknown / Data Share Listing.
- Price:** 300-500 (000s).
- Transaction Type:** Sale (selected), Lease, Exchange.
- # Bedrooms:** 3+ (selected)
- # Tot Baths:** 2.1+ (selected)
- # Full Baths:** (empty)
- # Half Baths:** (empty)
- Acreage:** (empty)
- Year Built:** (empty)
- Yr Remodel:** (empty)
- Sq Ft Above:** (empty)
- Sq Ft Lower:** (empty)

4. Click on the Results button located to the bottom of the search criteria screen.
5. At this point it is very important NOT to narrow your search results. By narrowing your search results RCO3® believes that you only want to send updates on those listings. If your search returns too many listings to send to client at once you can either revise your search by clicking on the Criteria button located at the bottom of the search screen, or you can select the listings that you do not want to send to your client and “Discard” them. Discarding will not affect your auto email the way Narrowing will.

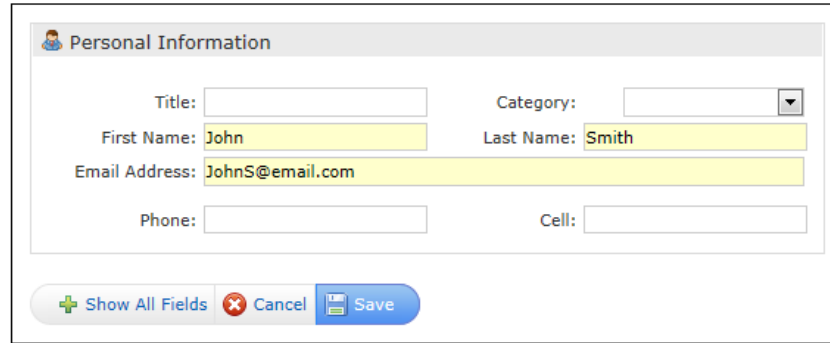
- Once you have all of the listings results that you would like to send to your client click on the “Save As” button located at the bottom of the search screen. By clicking on this button a pop up box will appear. At this point you can choose to Save As “New Auto Email”

**NOTE:** There is a max limit of 250 listings allowed to be sent in an email. This option will be disabled if this limit is exceeded.

MLS#	Stat	Ty	Address	City	County	Area	Price	DOM	Bds	Bths	TI	Sqft
212108460	ACTV	RS	4256 Sheridan	Royal Oak	Oakland	02251	\$300,000	N/4/4	4	2.2	2,189	
212042292	ACTV	RS	602 S Vermont Avenue	Royal Oak	Oakland	02251	\$320,000	N/183/183	3	2.1	2,061	
212080533	ACTV	RS	1014 Edgeworth Avenue	Royal Oak	Oakland	02251	\$335,000	N/84/84	4	2.1	2,300	
212087138	ACTV	RS	1010 Edgeworth	Royal Oak	Oakland	02251	\$335,000	N/66/66	3	2.1	2,300	
212072842	ACTV	RS	4304 Tonawanda Avenue	Royal Oak	Oakland	02251	\$347,900	N/102/102	4	2.1	2,500	
212102705	ACTV	RS	737 Gardenia Avenue	Royal Oak	Oakland	02251	\$349,999	N/25/25	3	2.1	2,100	
212102411	ACTV	RS	1222 Longfellow Avenue	Royal Oak	Oakland	02251	\$350,000	N/22/22	3	2.1	1,986	
212107296	ACTV	RS	210 N Vermont Avenue	Royal Oak	Oakland	02251	\$354,900	Y/60/60	3	2.1	2,250	
212078906	ACTV	RS	3230 Garden Avenue	Royal Oak	Oakland	02251	\$365,000	N/87/87	3	2.1	2,039	
212089872	ACTV	RS	1427 Butternut Avenue	Royal Oak	Oakland	02251	\$365,000	N/58/58	3	2.1	2,370	

- This will bring up the “Auto Email Settings

- Begin by selecting a **Contact**. By clicking on the drop down arrow next to the “Contact” field a list of all your contacts will appear. Select the contact to whom you wish to send the auto email. If your contact is not in this drop down list click on the link “Create a New Contact” next to the Contact field. This will open a pop up box where you can add in your client’s information. **NOTE:** All yellow fields found in Realcomp *Online*® 3 are mandatory fields and **MUST** be filled out in order to proceed. Once you have added all information, click on the “Save” button.



Personal Information

Title:  Category:

First Name:  Last Name:

Email Address:

Phone:  Cell:

9. You can now choose to “CC” (Carbon Copy) or “BCC me on all emails”. By checking off the “BCC me on all emails” you will receive a copy of all emails that are sent to your client.
10. **Subject line:** The Subject line is the title or subject of the e-mail
11. **Message:** The Message field is the Body of the email. This will only go out on the first email to your client.
12. **Display:** Your client will have the option to choose from a drop down list which display they wish to view the listings in. Only buyer formats are available.
13. **Make available for Reverse Prospect:** Allows this search to be included in the Reverse Prospecting process.
14. **Settings :**
  - “Enable concierge mode”: Will NOT automatically email listings to your client but will let you know when there are new matches so you can send only the ones that you want to go to your client.
  - “Enable as a Favorite Search on the Home Tab” makes the search easily accessible on the home page of RCO3®.
15. **Criteria:** The next section is brief explanation of the criteria that you have chosen for your client’s search. If this information is incorrect go back to the search results page and click on the Criteria button to revise the criteria.

**Criteria:**

Status is 'Active'  
 Listing Agreement is one of 'Exclusive Right to Sell', 'Exclusive Agency', 'Unknown (Data Share Listing)'  
 Listing Service is one of 'Full Service', 'Limited Service', 'MLS Entry Only', 'Unknown / Data Share Listings'  
 Current Price is 300000 to 500000  
 Beds Total is 3+  
 Baths Total is 2.1+  
 County is 'OAK - Oakland County'  
 MLS Area Major is one of 'Birmingham', 'Royal Oak'

**Settings**

Concierge:  Enable concierge mode  
 Enable as a Favorite Search on Home tab (10 maximum)

**Schedule**

ASAP: Emails are sent as soon as possible.  
 Daily: Emails with new matches are sent on the days you choose.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

[Clear](#)

Monthly: Emails are sent on the first of the month at midnight.

Cancel
 Save

16. **Schedule:** The schedule is when you would like your client to receive the emails.

You can choose:

**ASAP:** when the listing becomes available on RCO3® your client will receive an email. When choosing ASAP you want to be careful on what criteria you have selected. If you have set up a very broad search then your client may receive multiple emails a day.

**Daily:** Choose which days and either AM or PM. Whichever days and times you select is when your client will receive an email.

**Monthly:** All listings for the month are compiled and emails are sent on the first of the month at midnight.

17. Click Save when finished.