Managing My RCO3® Contacts and Saved Searches

Under the My RCO Tab

My RCO

Contacts		Your Contacts
Auto Emails		System sent emails
Concierge		Emails you manually approve and send
My Listings		Your listings
Saved Searches		Your saved searches (saved criteria)
Sent Emails		Emails sent out of RCO3®
My CMAs		CMA (COVERED IN CMA CLASS)
Settings		Agent settings

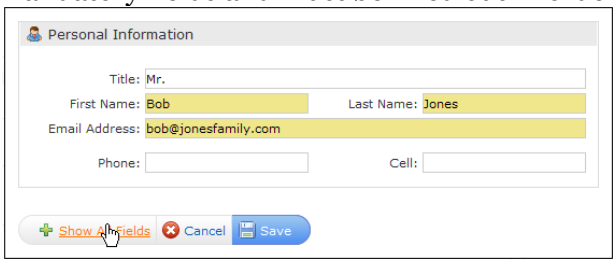
Adding a Contact

To add a contact, follow these steps below:

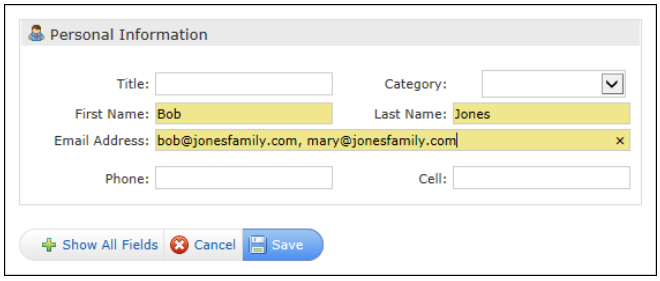
1. Click on the

button at the bottom of the screen

2. Fill out the information in the Personal Information pop up box. All yellow fields are mandatory fields and must be filled out in order to save the contact.

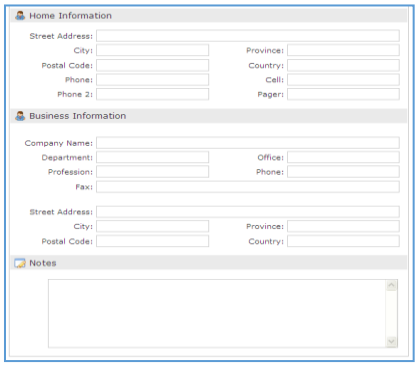


To add a second email address, such as emailing both a husband and wife at the same time, place a comma after the first email address and add the second one.



3. If desired, click on the

button to fill out more information on that client.



4. Click

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.

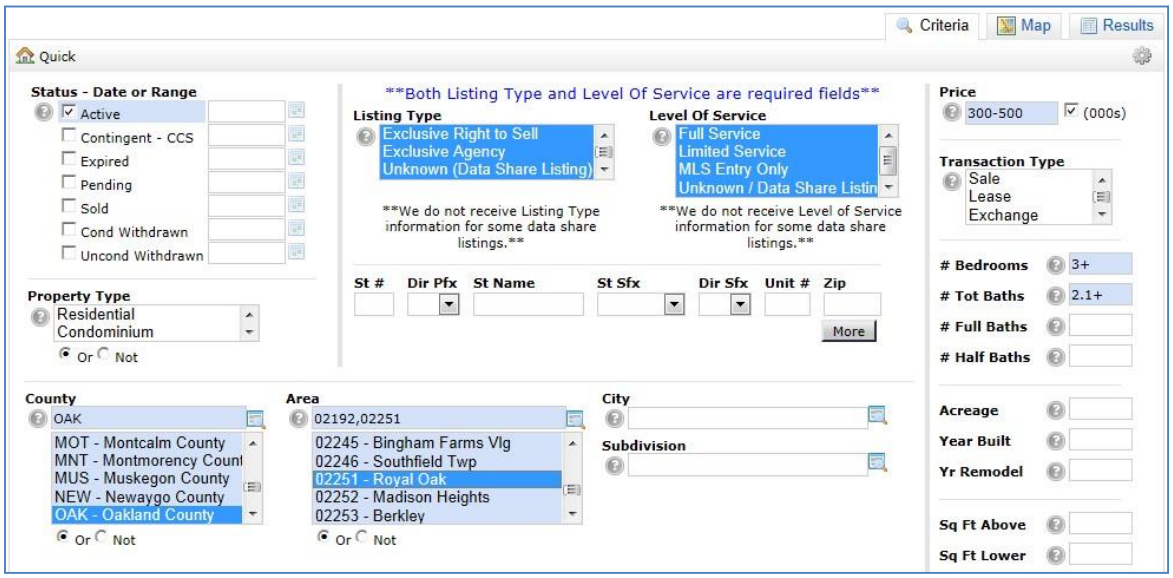
Note: There is a limit of 250 listings that can be sent per email.

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)

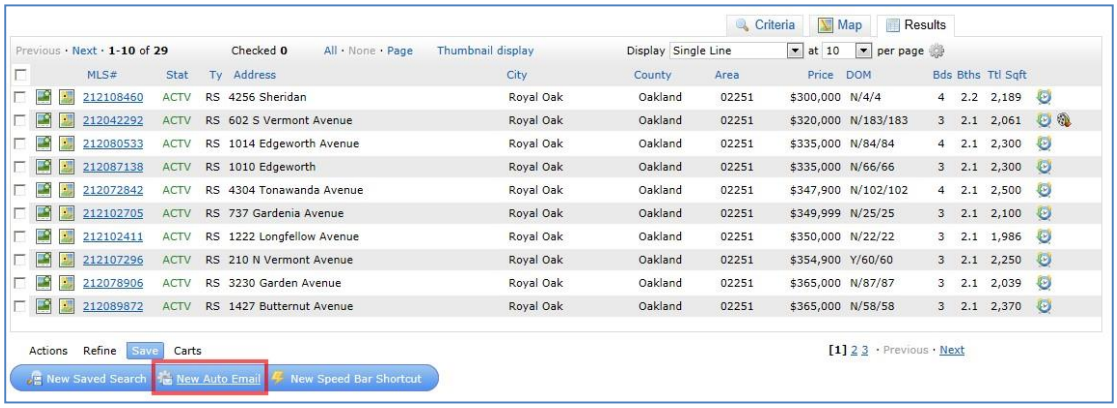


4. Click on the Results button located to the bottom of the search criteria screen.

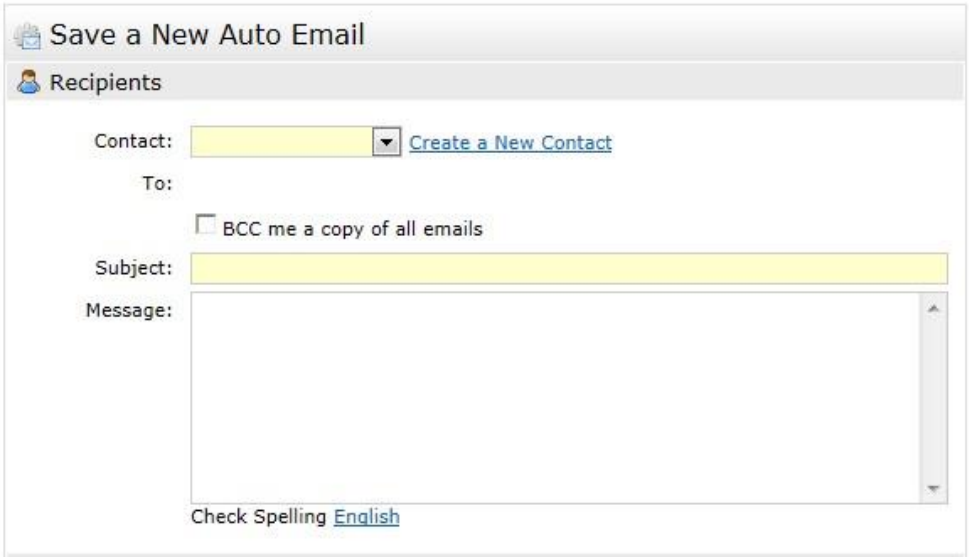
5. At this point it is very important NOT to narrow your search results. By narrowing your search results RCO3® believes that you only want to send updates on those listings. If your search returns too many listings to send to client at once you can either revise your search by clicking on the Criteria 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.

6. 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.

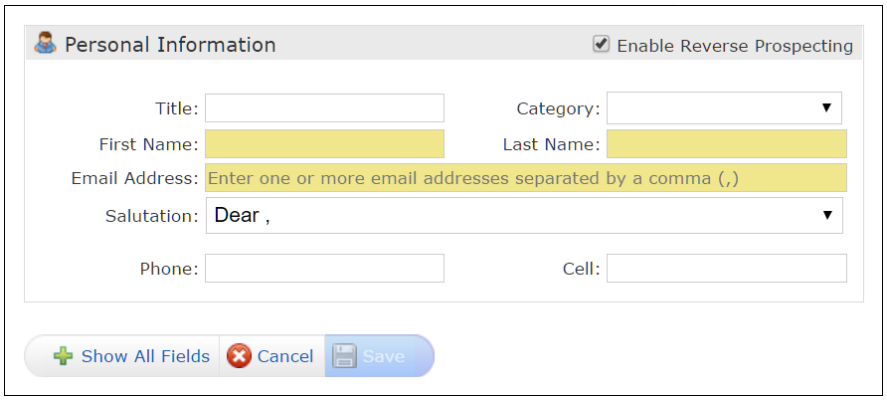


7. This will bring up the "Save a New Auto Email" page.



8. Begin by selecting a contact by selecting the dropdown arrow next to **Contact**. A list of all your contacts will appear. Select the contact to whom you wish to send the auto email. If you have not yet set up a contact for your client, 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. **First Name, Last Name, and Email Address are all required to add a contact. You can add up to 5 email addresses in the Email Address field, separating**

each with a comma. Once you have added your contact's information, click on the **"Save"** button.



9. You can now choose to "BCC me on all emails". By checking the **"BCC"** box, 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 email.

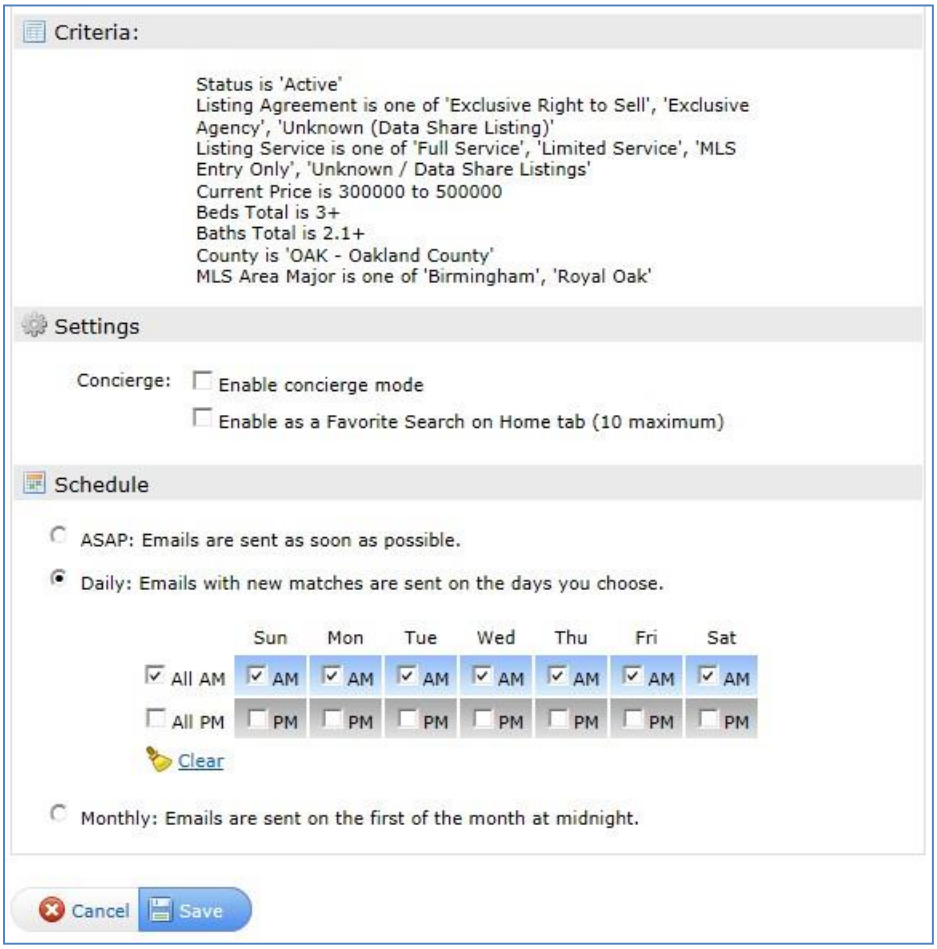
11. **Message:** There are two email message fields:: Welcome Email and Recurring Email.
    a. **Welcome Email:** This message prefills with general information about the client portal. You can edit this message to add additional instructions/information for your client. This message only goes out on the first auto email.
    b. **Recurring Email:** This message prefills with text stating that there are one or more new/updated listing(s) that match the search criteria. You can edit this recurring text to personalize it. This message goes out on ALL auto email updates.

12. **Make available for Reverse Prospect:** Allows this search to be included in the Reverse Prospecting process.

13. **Settings:**

    a. **Enable Concierge Mode:** Will NOT automatically email listings to your client but will let you know when there are new matches so can manually approve the ones you want your client to receive.
    b. **Enable as a Favorite Search on the Home Tab:** Makes the search easily accessible on the home page of RCO3®. You can have up to 20 favorite searches.

14. **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.



15. **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. Your client will only receive an email if there are new/updated listings, so they may not receive an email every day.

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

16. Click **Save** when finished.

Concierge Mode

When creating a new auto-email, you will also have the option of running it in concierge mode.

The differences between a regular auto email and a concierge mode auto email:

- A regular auto-email will automatically update and email your contact based on your scheduler settings.
- A Concierge auto email will first notify you of the updates (alert email optional) and then allow you to determine which listings to approve and reject for your client.

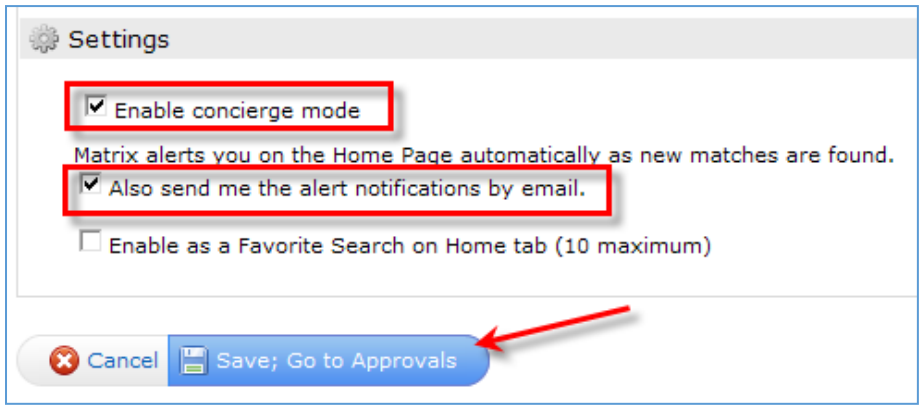
NOTE: Your clients will not notice any difference in the Client Portal between a regular auto email and concierge modes.

Turning on Concierge Mode

Under the Settings section in the auto email setup, simply click the "Enable concierge mode" checkbox.

NOTE: Selecting Concierge mode will automatically turn off/disable the Schedule settings. Updates to your client are now reliant on approvals from you. You also have the option of determining how you want to be notified about future updates to this auto email. By default, you will always receive new notifications each time you log in to RCO3® (from the home page). Click the "Also send me the alert notifications by email" checkbox to be notified of new listing updates via email.

(*This is strongly recommended if you won't be checking direct RCO3® notifications as often – you need to login to see these*)



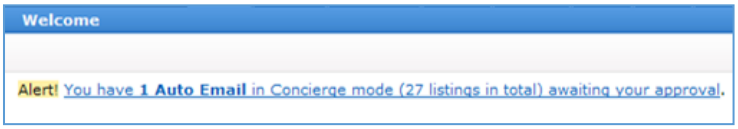
1. To initialize this auto-email in concierge, simply click "**Save; Go to Approvals**".

2. You will be taken to the Approvals page for the first time. This will display (in client mode) all prior listings you included when you first setup this auto-email. You have the option to uncheck all listings and select which listings you still want to include in the concierge auto-email.

3. If you are still satisfied, make sure all listings are selected and press the **"Approve Selected"** button at the bottom. You can omit any listings by ensuring they are not selected before pressing the **"Approve"** button.

Continue Watching Concierge for Newly Matched Listings

The concierge will become activated once the client has successfully received your email. You will also see a yellow alert on your RCO3® home page:

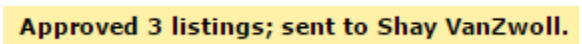


Click the link to open the concierge mode summary, and then click the Contact Name to pull up a list of properties to approve/reject.

Check the desired listings to email to your contact; then click the "**Approve Selected"** button. You can alternatively click the **Reject** button to permanently omit desired listings from this auto email in the future.

NOTE Rejected listings will not ever be included in this particular concierge mode auto email and cannot be retrieved once rejected

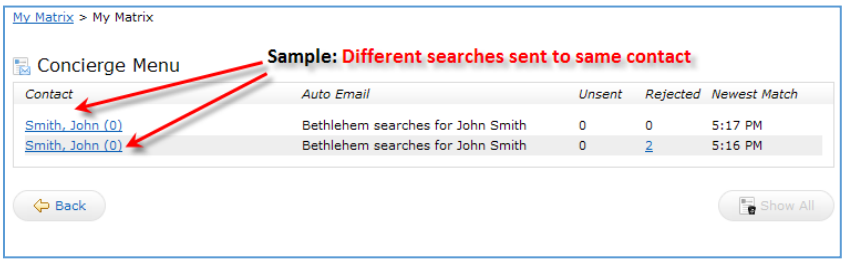
A temporary yellow alert will display at the top left:



Managing Your Concierge Mode Auto Emails

1. Click on the My RCO Tab
2. Click on "Concierge"
3. You will see each concierge you have currently setup:
    - Contact: Name of contact
    - Auto Email: Name of auto-email
    - Unsent: Number of unsent listings
    - Rejected: Number of rejected listings
    - Newest Match: Time of latest matches
4. Click on the desired Contact Name
5. This will display any and all as-of-yet unapproved or rejected listings

NOTE: You can send multiple different searches to the same contact. They will all be linked together under the same contact.



Why am I not receiving any updates?

In order to set up the portal for a concierge mode auto email, you must approve and send at least one listing. If you reject all of the listings, then you will not receive any further updates. Instead of rejecting them, approve at least one listing, even if you previously emailed it to your client through a manual email, and then your client can move them to the "discard" tab of the portal.

Look at the status on the far right of the auto email under the My RCO, Contacts page.

A green circle with a checkmark: Your auto email is active, meaning that RCO3® is searching for listings and will alert you when new properties are available to approve/reject.

A white circle with a green outline: The auto email has not been activated. Either your client has not clicked on the link in the first email to view the listings, or you rejected all of the listings. RCO3® is not searching for listing updates at this time.

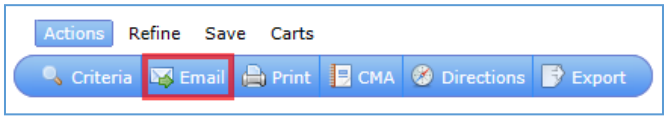
A red circle: The auto email has been disabled. Hover your mouse of the red circle to determine the reason:

1. Your client has “opted out” of receiving emails from you.
2. Your auto email search has gone over the maximum number of listings allowed (250). Please revise your search criteria and add additional criteria to limit your results. You can create more than one auto email per client if necessary.
3. Your client has not viewed the listings for an extended length of time, causing the auto email to time out.
4. The auto email was manually disabled by the agent.

Emailing listings

RCO3® allows you to easily email listings to your clients. Before you go to the email page, you must select the listings that you would like to email from your Search Results page.

1. Click the check box next to each listing to make your selections. **Note:** The Email button will be "grayed out" until you select at least one listing.



2. Once you have made your selections, click on Email button to go to the Email page.

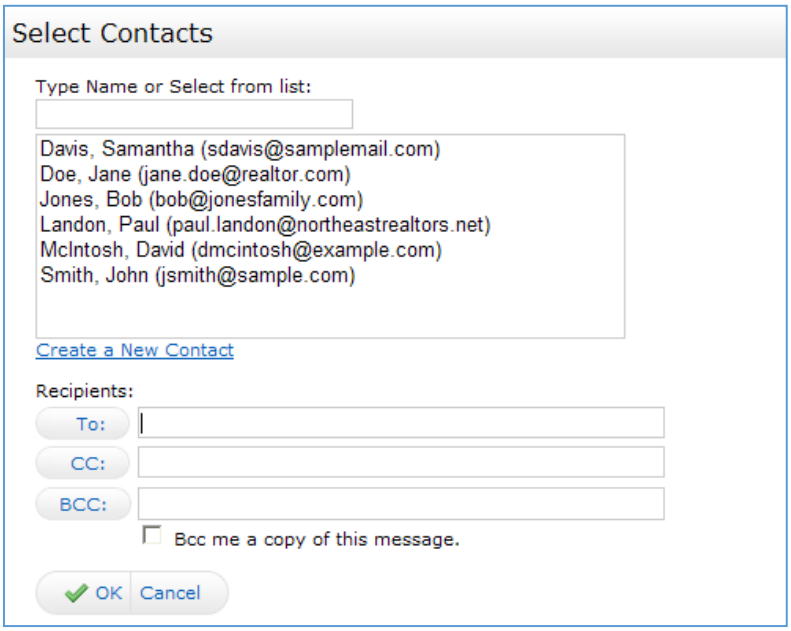
At the top of the email page is the number of listings that you have selected to email from RCO3®.

You can choose to preview the listings before you send them. The Preview button is located at the bottom of the screen. Next you will see the "Send" and the "Cancel" buttons which are also located at the bottom of the screen. If you decide you don't want to send an email at this time you can click on "Cancel" to return to the previous page.

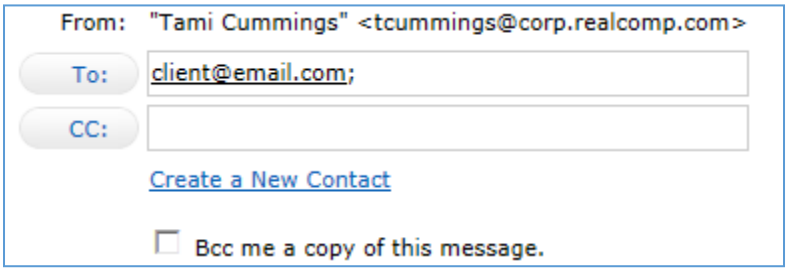
To create a new contact, select the “Create a New Contact” link. This allows you to add a contact directly into your address book.

To assign an existing contact to your email, simply click on the To: or CC: buttons. All of the contacts you have saved in RCo3® will be visible in this box. You can also start typing the name of the contact to which you wish to send the email. All contacts that start with those letters will appear.

3. To select a contact: Click on the contact’s name. To select more than one contact hold down the **CTRL** key while clicking on the additional contact names. **Note:** The contact’s name is associated with their email address.



If you are emailing listings to individuals that are not on the contact list, type their email addresses in the To or CC field.



The fields shown above work the same in RCO3® as they do in your regular email program. Here is a brief explanation of what each of these fields is for:

To: Enter the email address of the person you are sending the message to.
CC: (Carbon Copy) – The addresses in the CC: box will receive a copy of the email

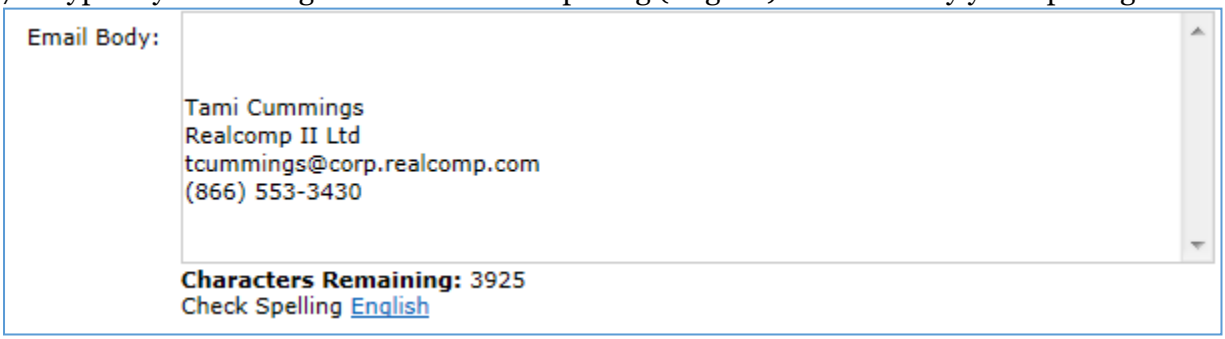
Note: Multiple addresses can be entered by separating them with a comma or semi-colon.

4. You have the option to select “BCC me a copy of this message”. This feature will also send you a copy. A more efficient way to see what has been sent to your clients is to use the Email History under the My RCO tab.

5. Type in the Subject: box the topic of the email.

6. Your client will have the option to choose from a drop down list which display they wish to view the listings in.

7. Type in your message. Use the “Check Spelling (English)” link to verify your spelling.



8. See Chapter 2 - Settings in the full RCO3® manual to setup your signature for future emails. If you have not previously saved an email signature, you can enter what you like here.

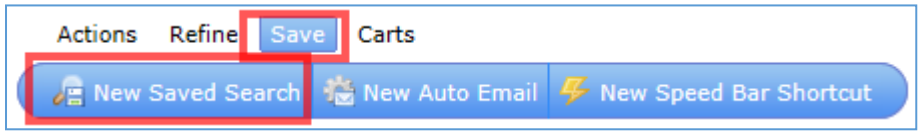
9. Click the Send button to send the email. After the email is sent you will be taken back to your original search results, highlighted by a confirmation message in the right-hand corner.

Keep in mind that this message indicates that the message was sent, not that it was received. **Note:** If you have emailed to an invalid email address, a notification will be sent to your public email account.

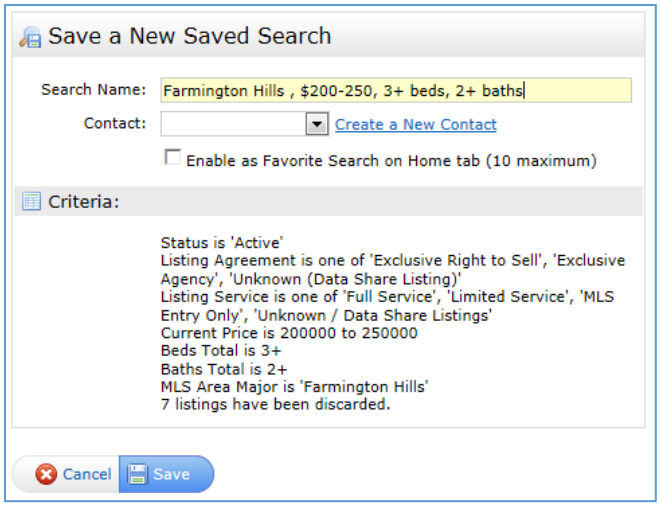
Saving a Search

The **Save** button allows you to save your current search.
To save a search in RCO3®:

1. Enter criteria and run the desired search.
2. On the search results page click on the Save button located on the Button Bar to view the saving options. Three save features will come up.
3. Click on "New Saved Search". This will bring up the "Save a New Saved Search" screen.

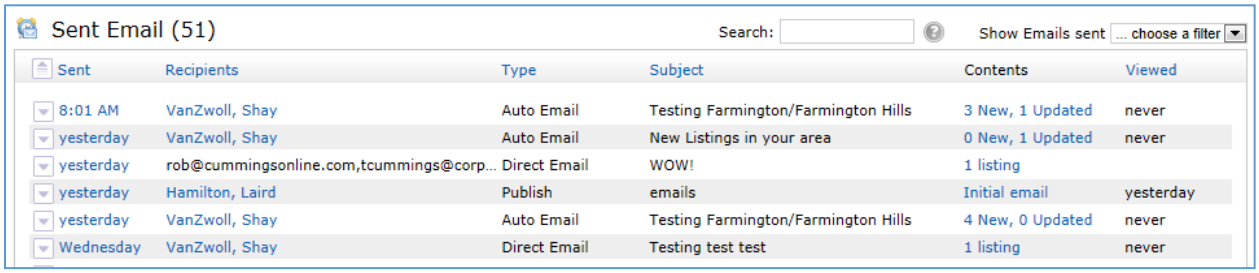


4. Fill out the Search Name field.
5. You can also choose to add a contact to the saved search. **Note:** Adding a contact to your saved search does NOT automatically email your saved search to that contact.
6. You have the option to enable this as a favorite search. Doing so will add a quick link to the homepage in the My Favorite Searches widget.
7. Click Save when finished.

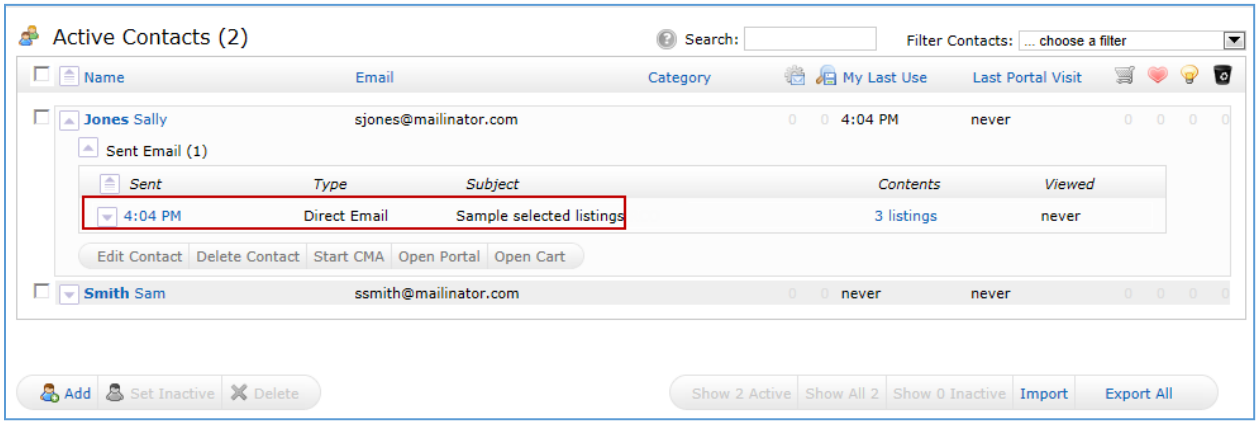


Email History

RCO3® keeps track of all emails you send through the system for 90 days. You can view your email history two separate ways. To view your email history, click on the My RCO tab and then the Sent Email link.



You can also view the Email History under My RCO – Contacts:



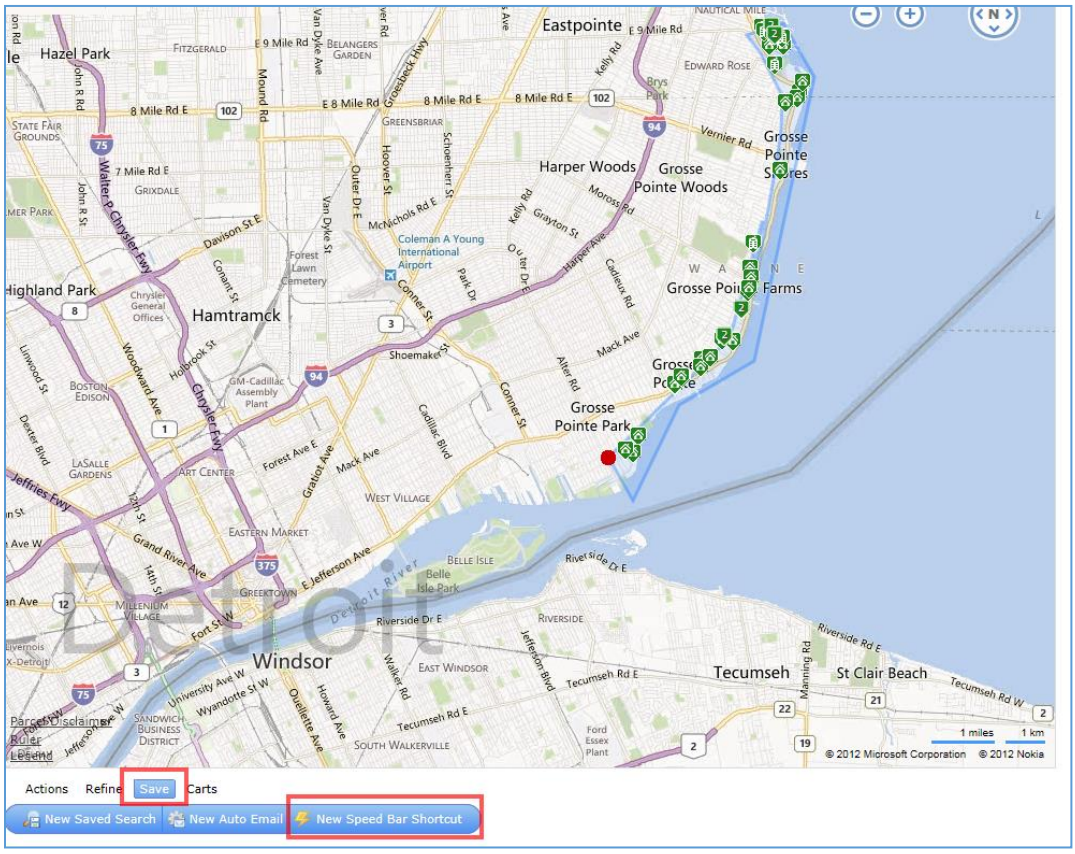
Viewing email history through Contacts:

1. Click on the My RCO tab
2. Click on the Contacts link
3. A list of all contacts will appear
4. Next to each contact there is a dropdown arrow
5. By clicking on the dropdown arrow a list of all items that you have set up for that client will appear. From here you can view things like CMAs, Sent Emails, and Auto Emails that you have attached to that client.

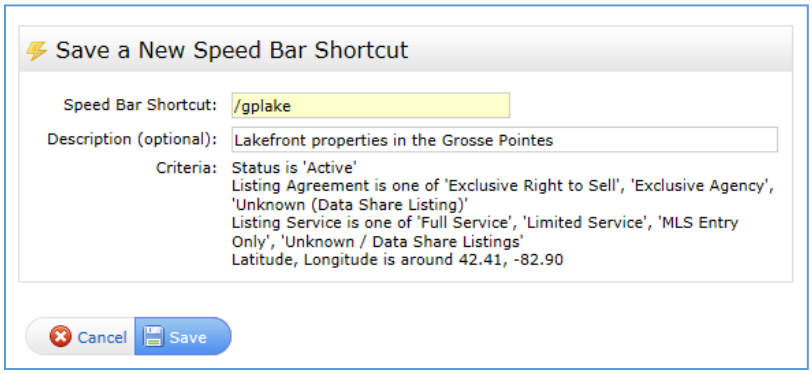
Custom Speed Bar Shortcuts

If you have some frequently used searches; you can create and save Speed Bar Shortcuts, and use these either alone or in combination with other Speed Bar entries.

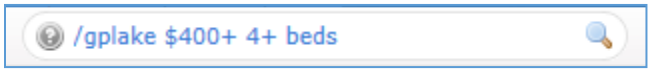
From any search, click Save. In the screen shot below, a search is being saved for active lakefront properties in the Grosse Pointes. Once the criteria have been entered, click Save and select New Speed Bar Shortcut.



A shortcut has the "/" slash as its first character. Enter a meaningful but short name, click **"Save"** when you're done. If you have other saved shortcuts, those will be listed below.

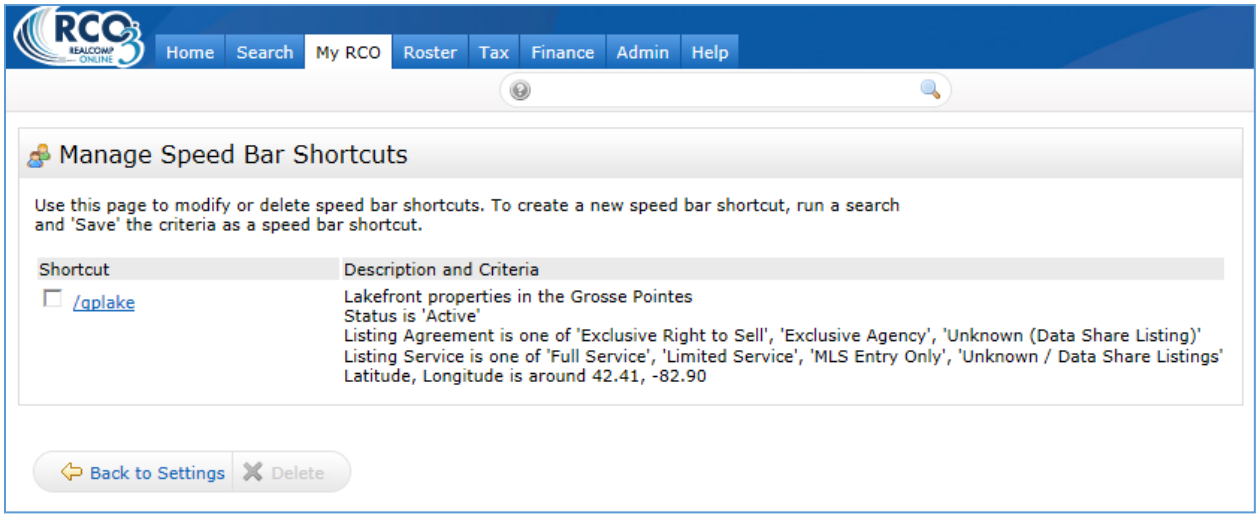


Once the shortcut is saved, it can be used in the Speed Bar and additional criteria can be added. For example to search this saved area for a listings that is over $400,000 and has 4 or more bedrooms, I can simply enter:



Managing Custom Speed Bar Shortcuts

You can find all your Shortcuts under My RCO > Settings >Speed Bar Shortcuts.



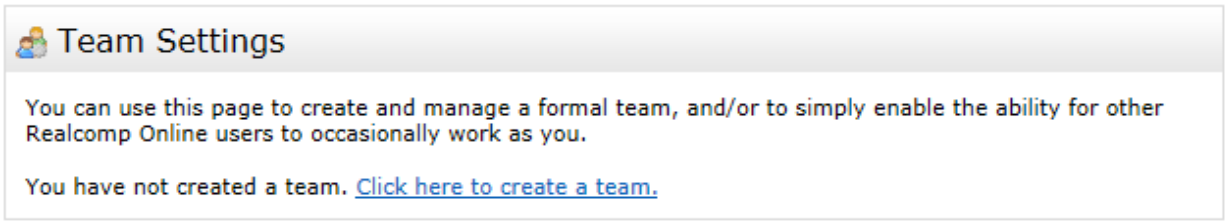
Click the shortcut name to edit. It will take you to the criteria page. Make any desired changes and click **"Save"**. This will update the existing shortcut.

To delete a shortcut, click the checkbox to the left of the shortcut name and click the **"Delete"** button at the bottom.

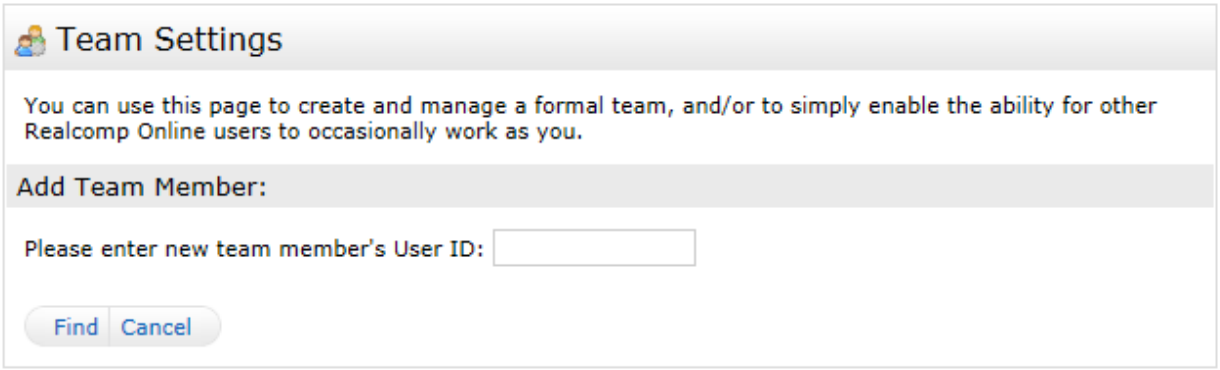
Managing Team Settings in RCO3®

You can use team settings to give another agent, or an assistant that has their own login, access to your RCO3® account without giving them your ID and password. When you add a team member, they will have access to all of your information, including the My RCO tab.

To start setting up a team, go to My RCO and select Settings. On the Settings page, select Team Settings. To being adding team members, click “Click here to create a team”.



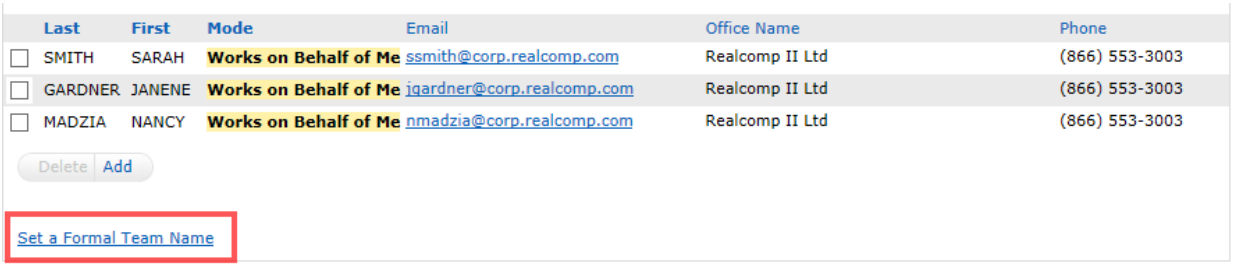
Enter the agent ID of the agent to which you wish to give access to your RCO3® account and click Find.



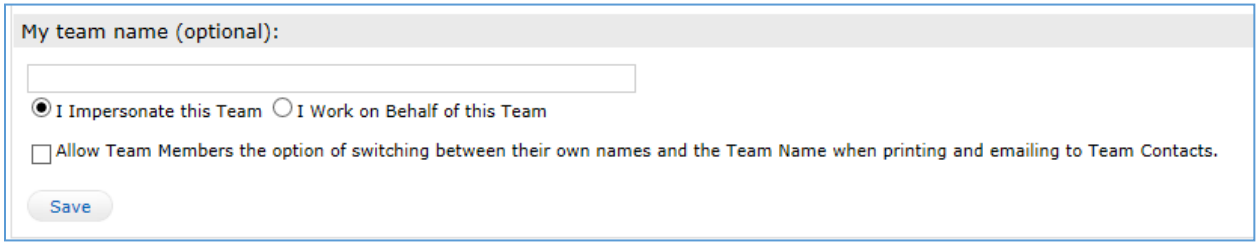
If the correct agent is found, click Add.

Continue adding agents until all agents and assistants in your team have been added.

You can also give the team a name, if desired.



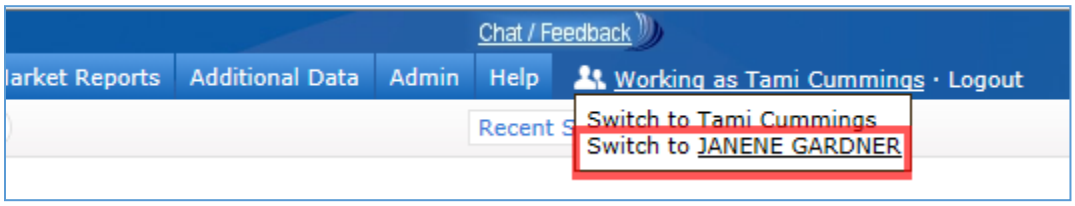
When setting up a team name, you have the option to allow your team members to impersonate you (send correspondence as the team), or work on behalf of the team so their name is clearly identified.



To remove any team members, place a check in the box to the left of their name and click the Delete button.

In order for you to have access to the accounts of your team members, they will need to authorize your access by going through these same steps to set up their team.

To log in as a team member, go to the top of the RCO3® home page and click the link that has your name on the right side of the blue menu bar. Click the link and select the person as whom you would like to log in.

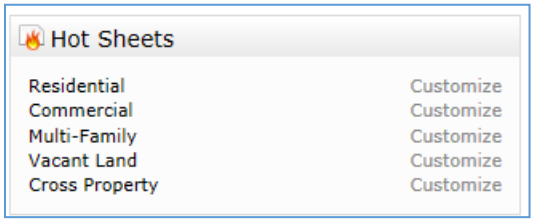


When someone is logged in as you, they will be able to send emails and make changes as though they were you. They also have any listing load and office access rights that you have been given.

If you have any additional questions, please contact Customer Care at (866) 553-3430.

Hot Sheets

The RCO3® Hot Sheets are a powerful and flexible way to get an overview of today's significant listing events. Examples: New listings, Back on Markets, Withdraws, etc.



Hot Sheet

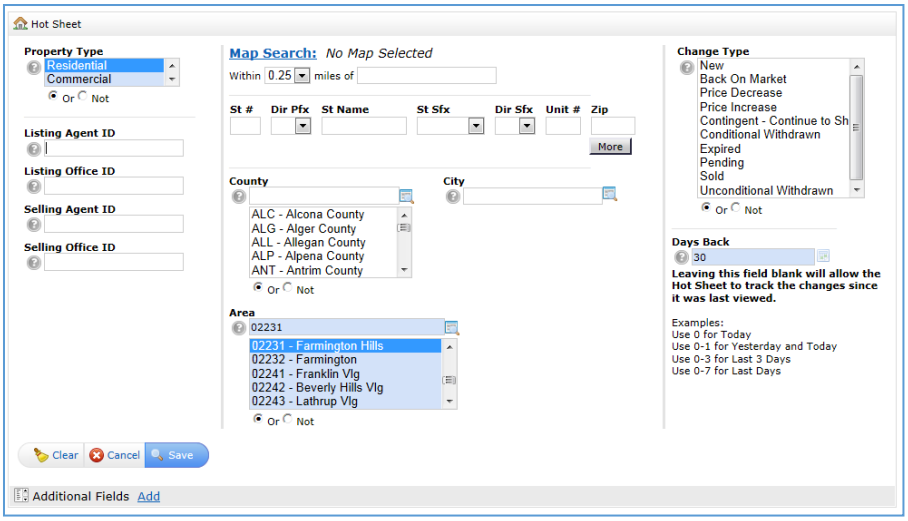
On the home page of RCO3® click on the property type link under the "Hot Sheets" section to retrieve the current Hot Sheet.

You may also choose to click on the "Customize" link to customize the Hot Sheet by specifying your choice(s) of Change Type, Area, City, County, Days Back, etc.

Customizing your Hot Sheet

You can customize your Hot Sheet to view listings by Status (Change Type), County, Area, etc, by clicking on the corresponding fields the same way you would define a Search.

Example: If you are looking for Residential within Farmington Hills within 30 days back, highlight Residential under "Property Type", "Farmington Hills" in Area, enter 30 in the Days Back field and hit the "Save" button.

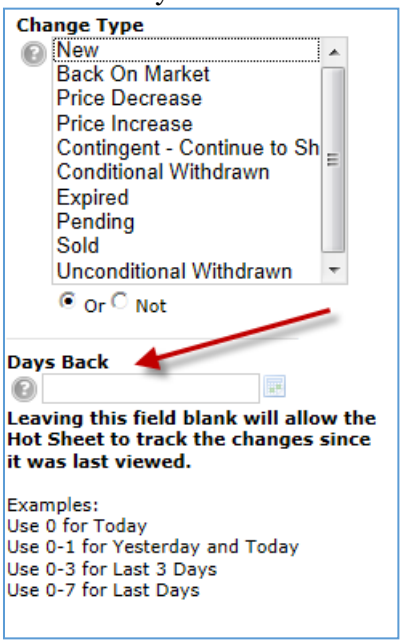


By hitting the "Save" button RCO3® will auto save this criteria as your "Customized Hot Sheet". Meaning each time you log into RCO3®, you can click on the link desired property type in the Hot Sheets widget on the Home Page of RCO3® to retrieve the listings based on this criteria. At

any point you can choose to reset your Hot Sheet back to the general Hot Sheet by clicking on the “Reset” link. **NOTE**: You may only have one Customized Hot Sheet at a time for any given Property Type.

2. Once you have your results you can treat the results the same as any other Search result.

3. Note the Days Back feature:



What this means is that if you leave Days Back blank, you will see each hotsheet listing only once per session. After you log out, all hotsheet entries will be cleared and on your next login, you will get only new entries that have been added since your last viewing.

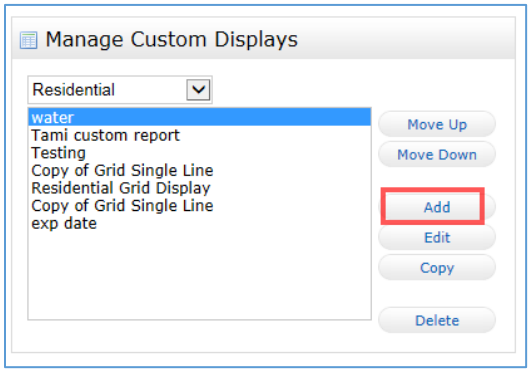
If on the other hand, you want to always see the last 2 days of activity, enter 2 in Days Back and this “disappearing act” will not happen. In this case you will always have the previous 2 days of activity, even on subsequent logins.

Creating a Custom Display (Report)

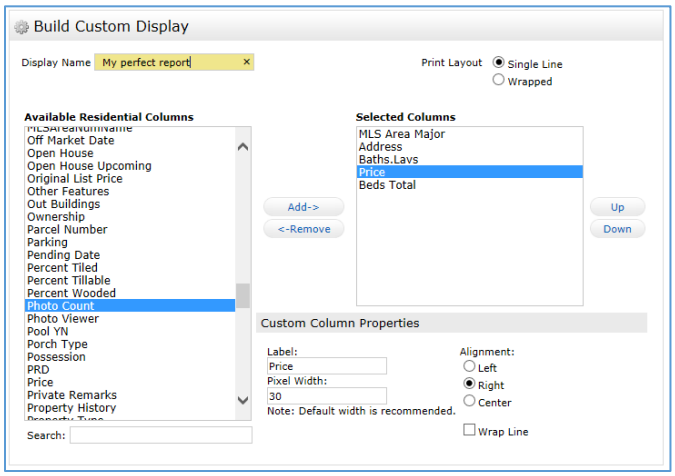
If you want to have fields displayed on a one-line report that are not currently in the default reports, you can make a custom display.

1. Select Settings from the My RCO menu. On the Settings page, select Custom Displays.

2. From this page you can edit a custom display that you made previously or click the Add button on the right to add a new report. Be sure to select the desired property type from the dropdown at the top so get are given the correct list of available fields.

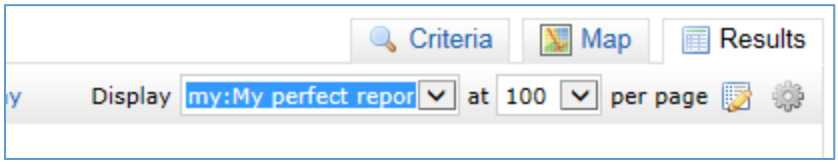


3. Give your new report a name and move the desired fields from the left column to the right column to add them to your report. Highlight the field name once it's moved to the right side and use the Up and Down buttons to put it in your desired order.



4. Click **"Save"** at the bottom when finished to save your new display.

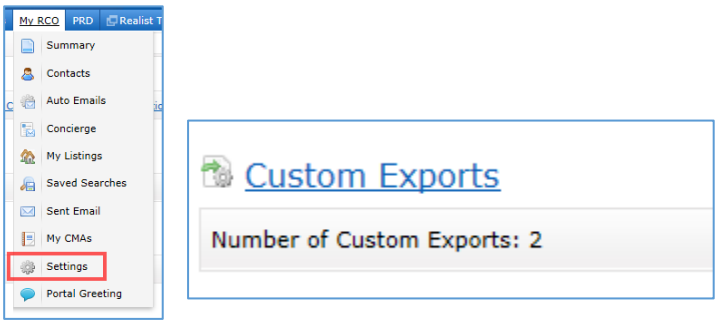
5. This report will now be available for display using the Display drop-down list at the upper right of your search results. All custom report names will start with **"my:"**.



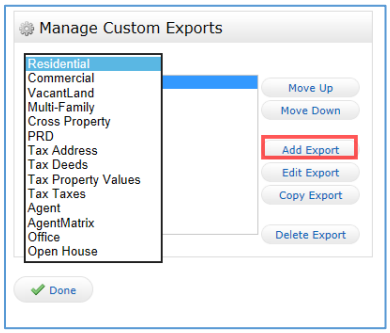
Creating a Custom Export in RCO3®

In RCO3® you can create a custom export allowing you to export the specific fields that interest you. This export will open in a spreadsheet once the search results are exported in your new format.

1. To begin setting up your custom export, select Settings from the My RCO menu. On the Setting screen, select Custom Exports.

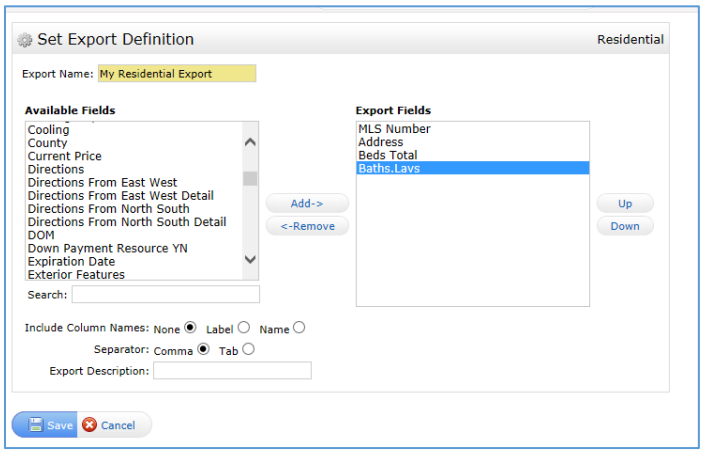


2. At the top of the page, in the drop-down box, select the type of export you wish to create.



3. Once you have selected the type of export click Add Export on the right side.

4. Next, give the export a name and select the desired fields to be included in the export. You can add fields by double-clicking the field name or clicking the field name once to highlight it and clicking the Add button that is located between the boxes. You can also reorder the fields in the Export Fields box by clicking on a field to highlight it and clicking the Up or Down buttons.



5. When you have completed adding and re-ordering your desired fields, click Save at the bottom.

Editing an Existing Export

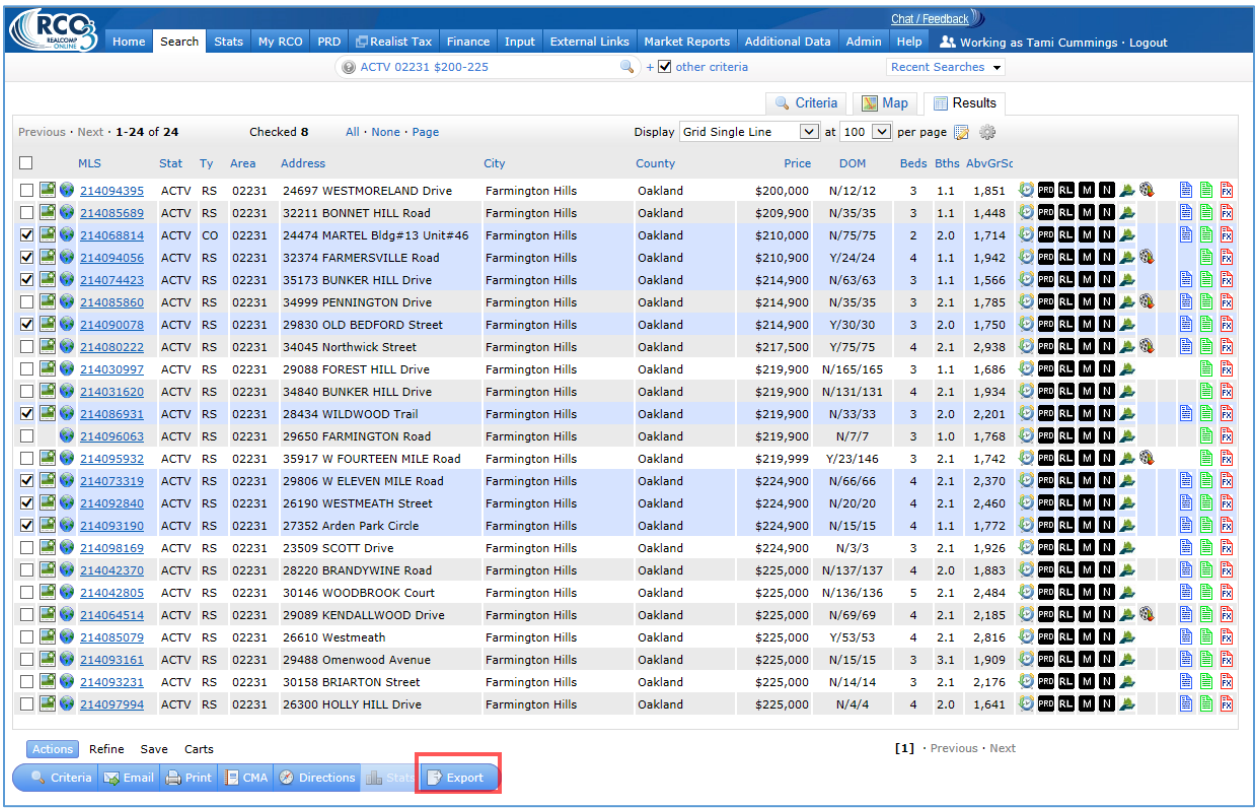
To edit an existing export, repeat steps 1 and 2, but click Edit Export instead of Add Export. Make any desired changes and save the export.

Using a Custom Export

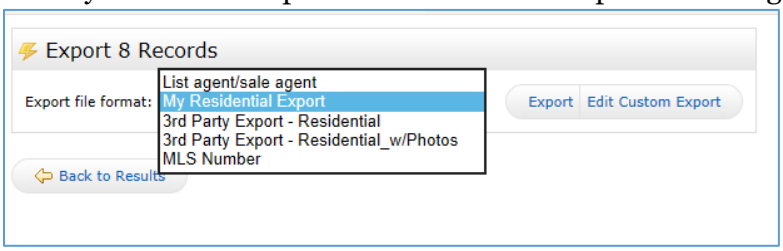
Once you have created a custom export, you can use it to export your search results.

1. Run your search using the Quick Search, Map Search or any other desired method.

2. Using the checkboxes to the left of each listing, select the listings that you wish to include in your export. Once you have selected the desired listings, click the Export button at the bottom of the search results.



3. Select your desired export format and click Export on the right side.



4. Depending on your operating system and the browser you are using, you will receive an option to save or open your export. Follow the instructions to save or open as desired.

If you have further questions about setting up or using a custom export, please contact Customer Care at (866) 553-3430, seven days a week.