Prospects

Once you have set up a prospecting search for a client using specific criteria, you can link this search to their client record for up-to-date monitoring. Additionally, you can set up the auto-notification feature to automatically check for new, or changed listings that match the prospect's search criteria. When listings match, the number of new listings is displayed on the Home page under **Matches**.

To see new prospecting matches:

1. From the **Prospecting** section of the Home page, any new matches such as a listing change or the addition of a property image, will show up in the counter.

   NOTE! *To have the notifications go directly to the **Matches** section of the Home page, don't select the e-mail options when setting Auto notification. See*

   NOTE! *Modifying Search & Notification Settings.*

2. Click directly on a link to open the Prospect Manager.

Working with the Prospect Manager

The Prospect Manager lets you easily view and manage the different kinds of searches you have set up (Prospecting and Non-Prospecting), and filter them by their source (System, Office, Personal saved searches, etc.). You can also modify the criteria and auto-notification settings for an existing search query.

To access and use the Prospect Manager:

1. From the main menu, click **Prospects** > **Prospect Manager**; or click one of the links in the **Matches** section on the Home page.

   The Prospect Manager page opens.

2. Click the **Display** drop-down list and choose which searches you want to display: **All Searches**, **Prospecting Searches**, **Searches expiring in 3 days**, or **Non-Prospecting Searches**.
3. To find a particular search, enter (in full or in part) the first or last name, e-mail address or ID# in the field, in the top right corner, then click the **Search** button.
   - click the **Show All** button to display all searches.
4. To sort the list of searches in ascending or descending order, click the column heading.
5. Click any of the blue hyperlinks in the list (such as Prospect Name or Search Name) to retrieve the related data. For example, click the prospect's name to open the client record.
   - click the e-mail icon to send a message to the prospect.
   - click the **Notes**, **Fav**, **Pos**, **Rej** or **Rec** column hyperlink (highlighted in yellow) to open the **Saved Listings** tab of the contact record.
   - click the [ ] icon in the last column to preview the personalized real estate site for the prospect.
6. To set up a new prospect type search, click the **New Prospect** button from the Action bar.

The Prospect Wizard opens. See

   Creating a New Prospect SEARCH.

7. Select a search record, then click an Action button to perform more tasks:
   - **View Search Results** — retrieves and displays new matches for the saved search. See Saving a Prospect Search.
   - **Edit Search Criteria** — opens the Search Criteria page, letting you modify the search criteria. See Editing Saved Search Criteria.
   - **Search and Notification Settings** — the Search Settings page opens, letting you save search settings and edit the auto-notification settings. See
   - Modifying Search & Notification SETTINGS.
8. To delete one or more saved searches, select the unwanted items then click **Delete Selected Searches** in the footer bar.

Viewing Search Results

Use the selected search criteria to perform the search again to find new results. The list of results can be quickly and easily sorted, rearranged, and filtered to display the saved search information in the manner that best suits your needs. You can use the Column Manager to view the results in a different layout format.

The page and its options are very similar to the Search Results page arrived at through Search Manager.

To retrieve new search results from a saved search:

1. From the Prospect Manager page, select one or more of the searches you want to run.
2. Click the **View Search Results** button.

   The Property Search [Search Name] page opens with the **Search Results** tab selected.

   note! *Any new matches that have occurred since the search was last run, are highlighted with a yellow 'Newly Matched' icon.*

3. If you selected multiple searches, use the **Previous** [] **Next** [] buttons at the top of the page to scroll through each of the search results.
4. Click a blue hyperlink to view the details of the selected search.
5. Select a search result in the list, then click one of the buttons on the footer bar: **Narrow Listing**, **Restore List**, **Move Up**, **Move Down**, **Recommend**, **Reject**, **Show Criteria**, **Mark as Viewed**, **Mark as New** or **Show Map**.
6. Using the mouse, point to the **Information** icon and select a **Quick Access** menu item:
   - **Report** — displays a property listing report that you can print or save as a PDF.
   - **Tax** — displays a public tax listing report that you can print or save as a PDF.
   - **Property History** — displays the Property History Report that you can print or save as a PDF.
   - **Images** — opens the Image Viewer, letting you see property photos.
   - **Map** — displays the selected property on a map that you can print.
   - **Notes** — displays the Note dialog box, letting you add or edit comments associated with the property. See Property Notes.
   - **Print** — lets you choose the print options for listing reports.

- **E-mail** — lets you choose the properties you want to e-mail.
- **Financial Calculators** — opens the Payment Calculator.
- **Charts** — displays the market area activity as a line chart, that you can cut and paste into another program, or print.

7. Select one or more search results in the list, then click one of the action buttons:
   - **Revise Search** — returns you to the Search Criteria page to revise search criteria.
   - **Save Search** — displays the Search Settings page so you can save the criteria. See
   - Modifying Search & Notification SETTINGS.
   - **Map** — displays the search results on a map.
   - **Driving Directions** — lets you plot a map of directions to the properties.
   - **Download** — exports the listing data in a format that can be used by another application, such as Excel.
   - **CMA** — select a listing to begin a new CMA presentation.
   - **Statistics** — displays listings statistics in a format that you can print.
   - **E-mail** — lets you e-mail a link to the selected properties; or add to the client gateway as an Agent recommendation.
   - **Print** — lets you print the selected listing reports.
8. Click the **Back to Prospect Manager** button in the header bar.

Property Notes

When you enter property notes for a listing, keep in mind the comments are are for your prospect to read when they view a recommended property using the Client Gateway. The note is time and date stamped.

To add a note from the property Search Results page:

1. Using the mouse, point to the **Information** icon of a selected listing to display the **Quick Access** menu.
2. Click the **Notes** [] icon.

   The Note web page dialog box opens.
3. Type your comments in the bottom text box, then click **Save**.

   The comment appears in the middle field, along with a time, date, and user stamp. This note can be viewed from the Prospect Manager main page by clicking the **Notes** column link (which shows the number of notes associated with the listing). See Working with the Prospect Wizard Steps.

To edit the text of a saved note:

1. Click the small up arrow and "edit text" label located between the two text fields.

   You can now modify the text of the saved comment.
2. Click **Save**.

Editing Saved Search Criteria

You can change the search criteria of a selected saved search directly from the Prospect Manager.

To load the criteria of a selected saved search:

1. From the Prospect Manager, either:
   - click directly on the **Search Name** blue hyperlink; or
   - select a single search in the list and click the **Edit Search Criteria** button.

   The Property Search [Search Name] page opens with the **Search Criteria** tab selected.
2. Make any changes to the search criteria fields. See *"Using the Search Criteria Page" on page 62*.
3. Click the **Save Search** button.
4. CLICK THE **Back To Prospect Manger** BUTTON IN THE HEADER BAR.

Modifying Search & Notification Settings

From the Prospect Manager page, select one prospecting search in the list to specify how the prospect is to be notified of new matching listings. You can save new, modify, or delete a prospecting search's notification settings.

To view or modify search settings:

1. From the Prospect Manager page, select a prospecting search in the list.
2. Click the **Search And Notification Settings** button.

   The Search Settings page opens for the selected search.
3. Select one of the **Save this search as** options:
   - **Save changes to current search** — click this default option to save any minor changes you may have made to the current settings.
   - **Save as a new search** — click this option to keep the original search intact, while saving the new search settings under a different name.

   note! *The **Save Search** function is usually performed from the Search Criteria and Search Results pages, but can be done from the Search Settings page.*
4. In the **Search Name** field:
   - accept the current name or type a new one for a saved search;
   - type a new name for a new search.
5. In the **Search Description** field:
   - accept the current description or type a new one for a saved search;
   - type a brief description for the new search's client gateway (optional).
6. In the **Search Type** section:

- the current search type setting is displayed for the existing saved search;
- click the drop-down list and choose one of the available search types for a new search.

7. Click **Save**.

   You are returned to the Prospect Manager.

   note! *Click the **Search And Notification Settings** button again to make further changes, or to specify the auto-notification settings for the selected search.*

8. Proceed to the **Auto-Notifications Settings** section, where you can define the frequency, duration and trigger events for sending e-mail notifications.

To view or modify auto-notification settings:

1. In the **Auto-Notification Settings** section of the Search Settings page, select the following options:
   - **Use Auto-Notification** — click **Yes** to use this feature.
2. In the **Auto-Notification Expiration** section, enter the number of days (up to a maximum of 60) in which e-mail auto-notification will expire. After this time, no more e-mail notifications will be sent.
3. In the **Auto-Notification Frequency** section, select how often you want the notification e-mails to be sent:
   - **ASAP** — sends a separate e-mail notification as soon as a new or changed listing matches the saved search criteria.
   - **Daily** — sends a single, combined notification e-mail on the day(s) of the week you specify by checking one or more of the check boxes.
   - **Monthly** — sends a single, combined notification e-mail on the 1st of the month and/or the 15th of the month, depending on the check boxes selected.
4. In the **Resend notification e-mail when** section, select one or both check box(es):
   - **List price changes** — the notification is sent again, should the list price change.
   - **Photo added** — the notification is sent again, but only once, should pictures be added.
5. Proceed to the **Prospect Notifications** section, where you can set automatic e-mail notifications to the prospect associated with the selected saved search.

To view or edit prospect notification settings:

1. In the **Prospect Notifications** section of the Search Settings page, select the **Send Prospect Notification To** check box to send an e-mail to the prospect's primary e-mail address (displayed by default).
   - use the **CC** or **BCC** fields to copy or blind copy other recipients on the e-mail notifications. Enter their e-mail addresses in the fields.
2. In the **Notification Subject** field, either accept the default 'Notification' subject line or type your own.

   note! *The contact's name and e-mail date will be added to the subject line automatically.*

3. In the **Notification Text** section, use the default text message 'as is' or change it by clicking the links:
   - **Edit my default text** — displays the Notification Message pop-up dialog where you can change the text of the message that is sent with each e-mail.

- **Restore to my default text** — click this link to revert back to the original notification message.

  note! *Do not delete the [Listing URL] merge code from the body of the message or else recipients will not be able to view the new property listing matches.*

4. If the prospect does not have a client gateway set up, the **Send listing report(s)** drop-down list becomes available. Select a report from the list.

   note! *If the prospect has a client gateway set up, you cannot send a listing report. Instead, the client gateway will be used. See Enabling a Client Gateway.*

5. In the **Save history of e-mail notifications** section, click the **Yes** option to save a copy of the e-mail notification in the prospect's E-mail History. See *"Viewing Contact Record Details" on page 54*.
6. Proceed to the **Agent Notifications** section, where you can select a report and send a copy of the notifications to the agent's primary e-mail or cell phone address.

To view or edit agent notification settings:

1. In the **Agent Notifications** section of the Search Settings page, select the select the **My Primary email address** check box if you want to receive a copy of the notification via e-mail.
2. Click the **Use the listing report** drop-down list box to select the name of a report.
3. Select the **My Pager or Cell Phone E-Mail Address** check box if you want to receive notification by way of your e-mail enabled pager or cell phone.
   - click the **Change** link to modify the displayed e-mail address.
4. Click **Save**.

   You are returned to the Prospect Manager page.

Creating a New Prospect Search

The Prospect Wizard guides you with easy step-by-step on-screen instructions on how to create one of five types of prospecting searches. Use the Select Prospect Search Type page to select one of the prospecting search type options.

To access the New Prospect Search Wizard:

1. From the main menu, click **Prospects > New Prospect Wizard**.

   The Select Prospect Search Type page opens.
2. Select one of the option buttons:
   - **Prospect Search - attach to new Contact** — create a new contact record, associate search criteria to it, and set up auto notifications of listing matches. See
   - Prospect SEARCHES.
   - **Prospect Search - attach to an existing Contact** — associate search criteria to an existing contact record and set up auto notifications of listing matches.
     See
   - Prospect SEARCHES.

- **Farming Search** — set up multiple contacts to receive auto notification updates for a single saved search. See Farming Search.
- **Personal Search with Auto Notification** — set up a search for which only you will receive auto notifications when matching properties are listed.
  See Personal Search with Auto-Notification.
- **Contact only** — create a new contact record, but do not associate any search criteria to it at this time. See Contact Only.

Depending on the option you selected, the next logical page opens. You can see the number of steps involved with each search type by looking at the Prospect Wizard sidebar.

Prospect Searches

If you selected one of the first two options, you are attaching the prospect search to a contact record (new or existing). A saved search can only be attached to one prospect, so if you attempt to attach a saved search that has already been associated to a prospect, the system prompts you to rename the search.

To attach an existing saved search to a new contact:

1. From the Select Prospect Search Type page, select the **Prospect Search - attach to a new Contact** option.
2. Click **Next Step**.

   The Contact Info page opens.
3. Enter client information in the **Client Information**, **Summary Comments**, **Home/Address/Other Address**, **Tracking Information**, **Client's Preferences** and **Client's Personal Information** sections.

   note! *Be sure to complete all required fields (red text). It's a good idea to enter an e-mail address to take advantage of e-mail features.*
4. Click **Next Step**.

   The Save Prospect Search page opens.
5. Select an existing saved search and rename it; or create a new search. See Saving a Prospect Search.
6. Click **Next Step**.

   The Enable Client Gateway page opens.
7. Choose whether or not to set up a client gateway. See Enabling a Client Gateway.
8. Click **Next Step>>**.

   The Set Up Notifications page opens.
9. Set up new auto-notification settings, or edit the existing settings inherited from a saved search. See Setting Up Notifications.
10. Click **Next Step**.

The Select Listings to Send Now page opens.

11. Choose to send all or a few matching property listings now, or choose to send them later. See Selecting Listings to Send Now.
12. Click **Next Step** to continue, or **Finish** to stop now.

The Send E-mail page opens.

13. Add more contacts to the e-mail recipients list, if you want, choose whether or not to send a copy of this e-mail to yourself, and append text to the e-mail message area. See Sending Listings Now.

14. Click **Finish**.

The E-mail Confirmation page opens, letting you view or print the e-mail.

To attach a prospect search to an existing contact:

1. From the Select Prospect Search Type page, select the **Prospect Search - attach to an existing Contact** option.

   The **Select a Contact** drop-down list opens.
2. Click an existing client name.
3. Click **Next Step**.

   The Save Prospect Search page opens.
4. The remaining steps are the same as for attaching a prospect search to a new contact. Follow steps 5 through 14 in the previous procedure.

Farming Search

If you selected the Farming Search option, you are setting up multiple contacts to receive auto-notification updates for a single saved search.

To create a new farming search:

1. From the Select Prospect Search Type page, select the **Farming Search** option.
2. Click **Next Step**.

   The Save Prospect Search page opens.
3. Select an existing saved search and rename it; or create a new search. See Saving a Prospect Search.
4. Click **Next Step**.

   The Set Up Notifications page opens.
5. Set up new auto-notification settings, or edit the existing settings inherited from a saved search. See Setting Up Notifications.
   - **Notification Subject** — this field in the **Prospect Notifications** section cannot be left blank.
   - **Modify recipients list** — click this link and select multiple recipients to receive this e-mail.
6. Click **Next Step**.

   The Select Listings to Send Now page opens.
7. Choose to send all or a few matching property listings now, or choose to send them later. See Selecting Listings to Send Now.
8. Click **Next Step** to continue, or **Finish** to stop now.

   The Send E-mail page opens.

9. Add more contacts to the e-mail recipients list, if you want, choose whether or not to send a copy of this e-mail to yourself, and append text to the e-mail message area. See Sending Listings Now.
10. Click **Finish**.

The E-mail Confirmation page opens, letting you view or print the e-mail message.

Personal Search with Auto-Notification

If you selected this option, you will set up a search for which only you will be sent auto-notifications when matching properties are listed.

To create a personal search with auto-notification to yourself:

1. From the Select Prospect Search Type page, select the **Personal Search w/ Auto Notification** option.
2. Click **Next Step**.

   The Save Prospect Search page opens.
3. Select an existing saved search and rename it; or create a new search. See Saving a Prospect Search.
4. Click **Next Step**.

   The Set Up Notifications page opens.
5. Choose whether or not to set up and use Agent-only Auto-Notification. If **Yes**, include:
   - **Notification Subject** — this field in the **Prospect Notifications** section cannot be left blank.
   - **My Primary E-mail Address** — select this check box to include, then click the drop-down list and choose a report format.
   - **My Pager or Cell Phone E-mail Address** — select this check box to include, then click the **Change** link if you need to modify this address.

   See Setting Up Notifications.
6. Click **Finish**.

Contact Only

If you selected this option, you will create a new contact record only, without associating any search criteria to it at this time. See *“Adding a New Contact” on page 52*.

Working with the Prospect Wizard Steps

The following sections describe the various Prospect Wizard steps to creating a new prospect search in more detail.

Saving a Prospect Search

When you have defined a search query to your liking and are satisfied with the results, you’ll want to re-use it by associating the search to a prospect, either existing or new.

To attach an existing saved search to the prospect:

1. Click the **Property Type** drop-down list and select a search type, for example, **Residential/Condo**.

2. Click the **Search** drop-down list and select an existing saved search.

   note! *If there are no saved searches for the selected search type, the drop-down list will be empty.*

   note! *A saved search can only be attached to one prospect. If the selected saved search is already attached to a prospect, the following warning message is displayed.*

   The **Search Name**, **Search Description** fields and **Edit/Preview** button become available.
3. Click the **Edit/Preview** button to modify the search criteria, prior to renaming the selected search.
4. Use the **Search Name** field to rename the search.
5. Type a short description in the **Search Description** field that will be displayed on the client gateway.

To attach a new search to the prospect:

1. Click the **Property Type** drop-down list and select a search type, for example, **Residential/Condo**.
2. Click the **Create New Search** button to build a new search query to associate with your new contact.
   - enter search criteria, perform a preliminary **Count** on the Search Criteria page and click **Save**; or
   - click the **Search Results** tab to retrieve the matching listings, select the records you want and click **Save**.

   The Save Prospect Search page re-opens.
3. Enter a **Search Name** and **Search Description** for the new search.

Enabling a Client Gateway

Establish a personalized web site where the prospect can view listings, make notes, and more.

To display listings on a personalized web site:

1. From the Enable Client Gateway page, click the **Yes** option.

   note! *If you have attached a new search, the system assumes automatically that a Client Gateway is being used. The Client Gateway Homepage Greeting text box is available to enter a greeting.*
2. Click **Next Step**.

   The Client Gateway Homepage Greeting text box appears.
3. Type a greeting in the text box that will appear on the web site's Home page.
4. Click **Next Step**.

   The Set Up Notifications page opens.

To send listings in a Listing report with a link:

1. From the Enable Client Gateway page, click the **No** option.
2. Click **Next Step**.

   The Set Up Notifications page opens.
3. Proceed to Selecting Listings to Send Now.

Setting Up Notifications

The Set Up Notifications page lets you specify how to notify the prospect of new matching listings. You can also modify notifications directly from the Prospect Manager page. See

Modifying Search & Notification SETTINGS.

To specify Auto-Notification settings (new or inherited):

1. From the Set Up Notifications page, click the **Yes** option.

   note! *If you've enabled a client gateway, the Auto-Notification settings option is automatically assumed to be 'Yes'. The option buttons in the **Use Auto-Notification** section will not be available.*

2. In the **Auto-Notification Expiration** section, enter the number of days (up to a maximum of 60) in which e-mail auto-notification will expire. After this time, no more e-mail notifications will be sent.
3. In the **Auto-Notification Frequency** section, select how often you want the auto-notification e-mails to be sent:
   - **A.S.A.P**. — sends a separate e-mail as soon as a new or changed listing matches the search criteria.
   - **Daily** — sends a single, combined notification e-mail on the day(s) of the week you specified.
   - **Monthly** — choose one or both check boxes to send a single, combined e-mail on the 1st of the month and/or the 15th of the month.
4. In the **Resend notification e-mail when** section, select one or both check boxes:
   - **List Price changes** — the notification is sent again, should the list price change.
   - **Primary Photo added** — the notification is sent again, but only once, should pictures be added.
5. Proceed to the **Prospect Notifications** section.

To specify prospect notification settings:

1. In the **Prospect Notifications** section of the Set Up Notifications page, select the **Send Prospect Notification To** check box to send an e-mail to the prospect's primary e-mail address (displayed by default).
   - use the **CC** or **BCC** fields to copy or blind copy other recipients on the e-mail notifications. Enter their e-mail addresses in the fields.
2. In the **Notification Subject** field, type a subject line.

   note! *The contact's name and e-mail date will be added to the subject line automatically.*

3. In the **Notification Text** section, use the default text message 'as is' or change it by clicking the links:
   - **Edit my default text** — displays the Notification Message pop-up dialog where you can change the text of the message that is sent with each e-mail.
   - **Restore to my default text** — click this link to revert back to the original notification message.

     note! *Do not delete the [Listing URL] merge code from the body of the message or else recipients will not be able to view the new property listing matches.*

   - click the **Spell Check** icon to scan the text for possible spelling errors.

4. If the prospect does not have a client gateway set up, the **Send listing report(s)** drop-down list becomes available. Select a report from the list.

   note! *If the prospect has a client gateway set up, you cannot send a listing report. Instead, the client gateway will be used.*

5. In the **Save history of e-mail notifications** section, click the **Yes** option to save a copy of the e-mail notification in the prospect's E-mail History. See *"Viewing Contact Record Details" on page 54*.
6. Proceed to the **Agent Notifications** section, where you can select a report and send a copy of the notifications to the agent's primary email or cell phone address.

To view or edit agent notification settings:

1. In the **Agent Notifications** section of the Set Up Notifications page, select the **My Primary Email Address** check box if you (the Agent) wants to receive a copy of the notification via e-mail.
2. Click the **Use this listing report** drop-down list box to select the name of a report.
3. Select the **My Pager or Cell Phone E-Mail Address** check box if you want to receive notification by way of your e-mail enabled pager or cell phone.
   - click the **Change** link to modify the displayed e-mail address.
4. Click **Next Step**.
5. Proceed to Selecting Listings to Send Now.

To set Auto-Notification settings later:

1. From the Set Up Notifications page, click the **No** option.
2. Click **Next Step>>** and continue through the rest of the Prospect Wizard steps.

Selecting Listings to Send Now

The Select Listings to Send Now page lets you review the listings that match the prospect's search criteria and select those you Recommend, while filtering out those you Reject. When the prospect runs this search on the web site, they will see your recommended properties. Or, you can choose to allow the auto-notifications to send only new or updated listings to the prospect at a later time.

To send selected listings to the prospect:

1. From the Select Listings to Send Now page, click the **review these listings now** link.

   The Search Results pop-up window opens with the newly match listings.
2. Select only those listings you want to send to the prospect, then click the **Recommend** button.

   The red flag [ ] icon appears in the row of recommended listings.

   note! *Be sure to clear the check boxes for the Recommended listings prior to selecting listings you want to tag as **Reject**. Otherwise, all selected listings, including the Recommended ones, will be tagged as **Reject**.*

3. To filter out those listings you don't want your prospect to see, select them in the list, then click the **Reject** button.

   The frowning face [ ] icon appears in the row of rejected listings.

4. Click **Close**.

   You are returned to the Select Listings to Send Now page. The total number of listings recommended (and rejected) is reflected in the new total.

5. Click **Next Step**.

   The Send E-mail page opens.

6. Proceed to Sending Listings Now

To send listings to the prospect later:

1. From the Select Listings to Send Now page, click the **Don't send any listings now** option.

   Auto-notifications sent to the prospect later will include only those properties that have been listed or updated.

2. Click **Finish**.

Sending Listings Now

The Send E-mail page opens when the selected prospect has a valid e-mail address entered in the Contact record and you have chosen to send selected listings.

To send an e-mail to the prospect:

1. The Send E-mail page should have the relevant fields already completed. Make any changes as required.
   - to add more recipients, click the link to the right of the To/CC/Bcc fields.
   - select/clear the Send me a copy of this email check box to enable/disable this option.

2. Click the **Finish** button.

   The e-mail is automatically sent and the Email Confirmation page opens.

3. Click the **View email** link to read the message.

4. Click the **Print** button to print a copy of the confirmation.

5. Click **Close**.

   You are returned to the Prospect Manager.