

# How to Use the Auto Email Feature



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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 RMLSSweb.

Below you will find instructions for using this product. 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 create a Prospect Profile which includes the ACT, BMP, SSP, PEN, SLD, SNL and/or SSP status. (If you already have a Prospect Profile that matches this criteria you may use that instead of creating a new one.) 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.

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.

Desktop | Search | **Prospecting** | Realtor Info | MLS Roster | Toolkit | Back Office | Logoff

**Prospecting**  
irving farmhouse

Profile Name: irving farmhouse

Block Reverse Prospecting:  Yes - Block Reverse Prospecting  
No - Allow Reverse Prospecting

Agent Email Address: You must have a valid email address entered in User Preferences in order to receive Prospecting notifications from RMLSSweb.

A new dialogue box will open and allow you to choose a Contact from your Contact Manager by selecting the name of the Contact and clicking OK. You can also create a new Contact by clicking New. (If you have an existing Contact for this Prospect Profile you can use that, just make sure that they have a valid email address.)

New Contact

[Billy Bob](#)  
[qus gates](#)

Contact Details

Note: Changes made to the following information are duplicated in Contact Manager. This information is for your convenience only and is not available to other Agents.

Contact ID:

First Name:  Last Name:

Address:

City:  State:  Zip:

Home Phone:

Work Phone:  Ext:

Notes:

Email 1:

Email 2:

Email 3:

Auto Email:  Auto Email to Contact

**Using Existing Prospects**  
If you would like to use an existing Prospect which includes ACT, BMP, PEN, SSP, SLD, and/or SNL but the appropriate Contact is not already associated with this Prospect Profile you can add it by finding the Prospect and then clicking on Contact at the right.

**Contact Manager**  
When you add a new contact or change an existing contact through Prospecting the information is updated in Contact Manager as well.

**Contacts Per Prospect**  
You are allowed a maximum number of five contacts per Prospect. When you add the fifth one, the "Add New Contact" button is disabled.

**Email Addresses**  
You may add up to three email addresses per contact. When you send email to a contact with three email addresses, it will go to all three of them.

Additionally, we no longer permit multiple email addresses to be entered into a single field. For any contacts that you had multiple email addresses in a single field we have the additional addresses in the Email 2 and Email 3 fields.

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.

**How Long Will My Client Be Able to See the Results?**

The link from this email is only available for 30 days after it was sent or 100 viewings, whichever comes first.

**Agent Email Address**

One of the requirements for using Auto Email is that the agent must have a valid email address in User Preferences. This is true for sending ANY emails from RMLScweb, not just Auto Email. If this is missing, the agent will be directed to enter one when they attempt to send an email.

**Initial Profile Matches**

When setting up a new Auto Email it is important to note that only new matches will be sent to your client on the day(s) chosen. The initial matches must be selected manually and sent in a separate message.

**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.

Status: Active. To disable Auto Email uncheck "Enabled" and click "Save".

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 Short

Banner:  Show Banner in header of report

Email Subject: test

Email Text:

Signature:  Append your signature to email body

The first time you check this 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.

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. 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.

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.

Report: Client Short

Banner: Client Full


Email Subject: Client Full - No Photo

Email Text: Client Medium

Comparison


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 Short, but by clicking the arrow to the right of Report you will notice that there are eight different reports to choose from.

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.



Lynn 1 Training  
 Subscriber Services Rep.  
 ACME Real Estate  
 825 NE Multnomah St.#270  
 Portland OR 97232  
[RMLS Public](#)

Phone: 503-236-7657  
 E-mail: rmls09@rmls.com



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.

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."

When finished entering all the information, click the Save button all the way at the top of the page.

## 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. To the right you will see a History button. Click on that.

<input type="checkbox"/> becca2	<a href="#">New!</a> (Since 8/16/2004 1:31 PM)	<a href="#">Search</a>	<a href="#">Criteria / Rename</a> <a href="#">Contact / Delete / Disable</a>	<input type="checkbox"/>
<input type="checkbox"/> <a href="#">John Avers</a>	Total Emails Sent: 0		<a href="#">Delete / Disable</a> <a href="#">History</a>	Expires On 7/26/2007
<input type="checkbox"/> inving farmhouse	None (Since 8/31/2004 1:57 PM)	<a href="#">Search</a>	<a href="#">Criteria / Rename</a> <a href="#">Contact / Delete / Disable</a>	

You can also get there by scrolling over Toolkit and clicking on Contact Manger. Once you find the Contact with the question you can click the View Auto Emails button.

Contact ID: 143053

adams, sharon  
[class@rmls.com](mailto:class@rmls.com)  
arlie, suzanne  
[ovaga1@msn.com](mailto:ovaga1@msn.com)

## Opt In or Out

We now offer 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.

### Signature

If you would like your contact information to appear at the bottom of each email click the box next to "Append your signature to email body". To view the information that will be in your Signature, scroll over Toolkit and click on User Preferences. Look for the box titled E-mail Signature.

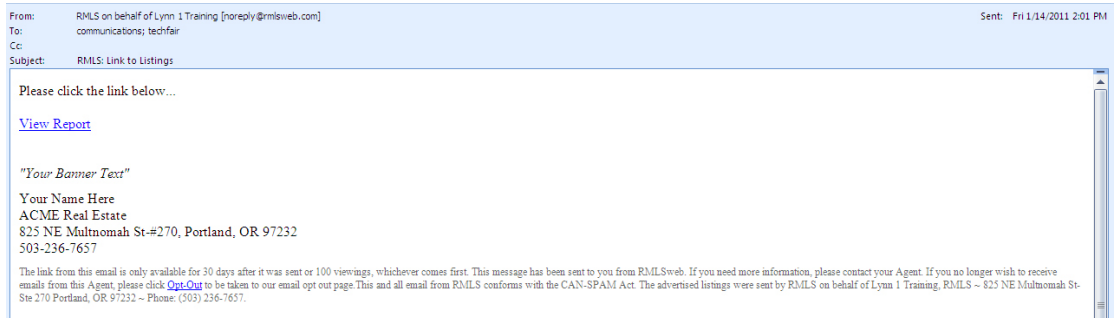
### Auto Email Profiles Expire

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.

### Why Does My Client See Fewer Listings the Next Day than the Day they Received the Report?

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.

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. If you have questions please feel free to call our Help Desk at 503-872-8002 or toll-free at 1-877-256-2169.

After all that, setting up an Auto Email to your client may seem pretty complicated so let's review what you need in order to get it going correctly. Also, rest assured that you will be notified during the inputting process if there is a problem.

In order for emails to be sent, all of the following must be true:

- The Prospect Profile it is associated with must be enabled.
- The Prospect Profile may include ACT, BMP, SSP, PEN, SLD, and/or SNL status.
- The Auto Email Profile must be enabled.
- The agent must have an email address set up in User Preferences.

## Let's Review

### CAN-SPAM Act

We have worked very hard to ensure that this and all email from RMLS™ conforms with the CAN-SPAM Act.

- The Contact must have an email address.
- The Contact must be opted in.
- There must have been matches since last time the Auto Email Profile was created, enabled, or run (if there are no new matches, no email will be sent).
- Double-check the day(s) you want your email to send.