Auto Prospecting The Quick Method

First, set up your Client's Search criteria

For example, using a *Standard* Search, select your *Client's criteria*

Let's say your Buyer wants a Single Family home... In Canfield, Ohio...

Within a price range of $200,000 to $420,000...

Enter your *Client's name* in the *Save as New Prospect* field under *Options* at right

Click the *Save* button

The Client's Contact Information screen appears

Assign your Client to a *Group*

Enter your Client's email address

Checkmark the *Auto-Prospecting* option

Select *Yes* to receive email as the sending Agent (You actually have no option, if you want your Client to receive email)

Select *Yes* to send email to your Client

Select the *Report* format you want your Client to receive

Click the *Save* button

We are shown that 63 listings match our Client's criteria

Click the *View* button

We are now at the Client's "Cart"

Assuming you want your Client to see these currently Active listings that match their criteria...

Click the *Email* button to "manually" send these 63 listings to your Client

Select a *Report* format (Keep in mind that at this point there are usually a large number of listings to view, so the Client Summary may be the best choice)

Click the *Submit* button

Your Client's email address is entered automatically

Your email address is also entered automatically

Click the *link to preview* what your Client will see

Personalize your message by *adding a note* to your Client

Click the *Send E-mail* button

Click the *Close Window* button

That's it!

Four times each day at roughly 8 am, 12 pm, 4 pm and 8 pm, the system will search and if a match is found, an email update will be sent to you and your Client

To return to your Client's Contact Information page, click the *Client's Name*