SETTING UP A SUBSCRIPTION

Basics

Subscription

Automatic listing updates

Based on search criteria

Emailed to your clients

You set the schedule

You get a copy email

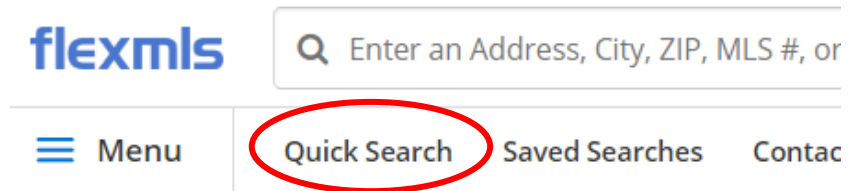You can stop any time

Set yourself up

Track client activity

Subscriptions

WHAT IS A SUBSCRIPTION?

- An automatic email sent to your client based on a saved search.
- The automated email contains any new listings and status changes within that saved search.
- You set the schedule of how often the updates get sent to your client.
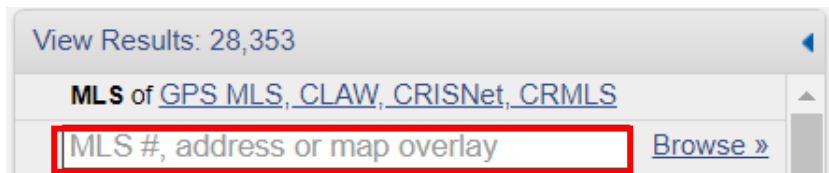- You get a copy of the email sent to yourself.

1) Begin a basic "Quick Search."

a) Select the property type from the dropdown arrow and then add your basic criteria for the search: status, list price, bedrooms & baths.
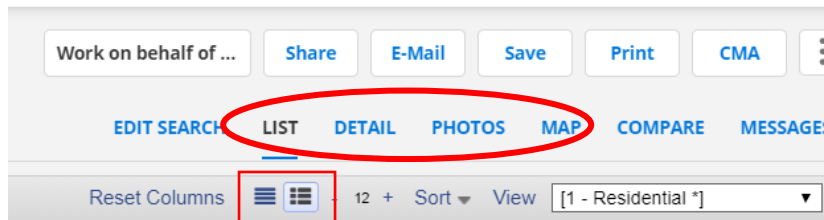

Property type

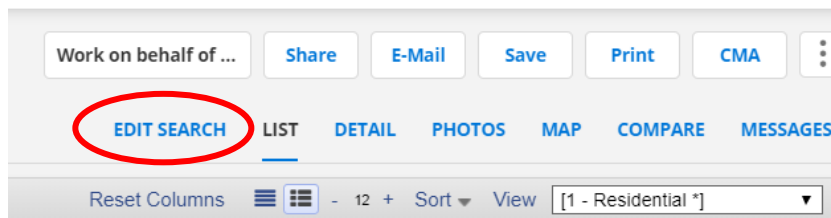b) Use the geocoded search bar to type in a subdivision.

Subscriptions

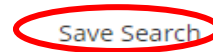c) Begin reviewing the search results using the viewing buttons below.

d) Make any adjustments to your search by clicking on the "Edit Search" button.

e) Click the "Save" button.

f) Select "Save Search."

2) Fill in the "Save Search" dialog box.

1. Name your search.

2. Add "New" or select "Existing" contact.

3. Click on "Save and Add Subscription."

Subscriptions

3) Fill in the "Add Subscription" dialog box.

Add Subscription

General Subscription Options

Subscription name   [Subscription Name]   **a.**

Send notification of new listing   **b.** ☑ You (sender)   ☑ Selected contacts

      ☐ Send me an email when a contact clicks the link

      ☐ Enable Preview Mode ❓

c.

Contacts   [Contact Name]   **d.**
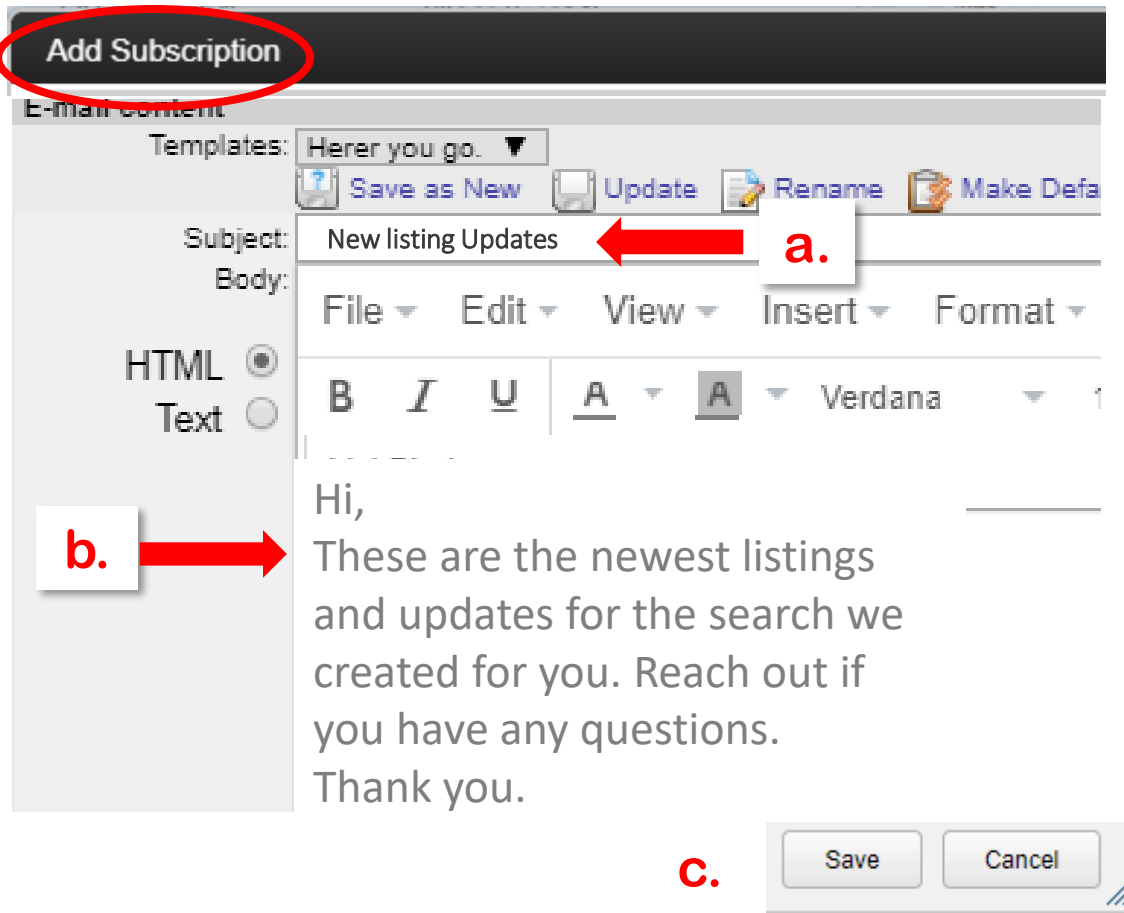
Schedule: Please choose a schedule for this subscription

◉ Weekly: ☑ Sunday ☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday ☑ Friday ☑ Saturday |

◯ Monthly: [1st ▼] day of each month

◯ ASAP

a) The subscription name will auto fill by default you can change it if you prefer.

b) You will get a copy of the subscription emails by checking this box.

c) The contacts name will autofill.

d) Select the schedule your client would prefer to receive the listing updates.

Subscriptions

Fill in the subject and body of the subscription email.

Keep it simple because this is the scheduled email that gets sent to your client with the new listing updates.

a) Add the subject line.

b) Type in a basic message.

c) Click "Save."

Subscriptions

4) Send the saved search.

This will be the last step in the series.

This step will send the listings from your saved search. Click on email these listings.

✔ Search and subscription saved.

Would you like to:

- Email these listings now **4.**
- Choose listings to email
- Do not send listings now

a) Fill in the email dialog box.

Compose this one time email to your client. You can be more specific in this email. The email will go to your client this one time and contain the saved search results.

b) Click "Email" after you have filled in the fields.

a.

Recipients

From: erika@cdaronline.org [primary] ▾

To: **The contact auto populates here.**

1 contact selected

You may also enter one or more additional e-mail a

Check this box to get a copy of the email.

☐ Send a copy to me
☑ Notify me the first time the recipient views this

How would you like to send this e-mail? Use Flexr

Message

Templates:

Subject: **Type the subject for the email here.**

Message body:

File ▾ Edit ▾ View ▾ Insert ▾ Format ▾

B I U A ▾ A ▾ Verdana ▾ 1

Type a personal message to your client in the body of the email.

b. 🖥 View Listings 📧 E-Mail