



Contact Manager-Auto Email *Tips and Tricks* November 2008

Prospecting for properties for your customers is made easy with the Auto Search and Auto Email functions of Paragon. Once you have manually done the initial search and initial email of listings to your customer, Paragon will take over that work for you. This guide will show how to set up an auto email notification to a buyer of a saved search of their criteria. You must have a saved search associated to the buyer first before you can set up the auto email.

We will start from the saved search lined column of the Listing Info tab. The first column is Email Notify. **Click Off** to open an email compose page so that you can set up the email as you want for this customer.

General	Listing Info	Notifications	More Info	Summary
★ Listing Favorites # Days Back: 1 Go Delete				
E-mail Noti Favorite List Name # of Listing Changed Date Created Date Modified List Notes Quick Actions				
Saved Searches # Days Back: 1 Go Assign Add New Delete				
<input type="checkbox"/>	<input type="checkbox"/>	Off	Saved Search for Rodgers, Craig S	29 29 0 -- Select --
Saved CMA Add New Delete				
CMA Name Subject ID Address Date Created Date Modified Quick Actions				

This is the top part of the email compose window. The "To" address box will auto fill if you have their address in the General Info tab. If you want to get copied with this email automatically, put your address in the "BCC". (User Preferences will tell you how to make this automatic too.)

MODIFY E-MAIL NOTIFICATION: Save | Close

Notification Status is: On Off

To: craig@abc.com

Cc: Bcc: myemail@myoffice.com Bcc me

Subject: Real Estate Listing Notification For Craig Rodgers

Result View: Client Detail

Notify: Immediately Selected Time

Notify Time: 6 : 00 PM

The "Subject" line will also auto fill with the main name of the prospect.

"Result View" will give you a drop down with choices of views. Choose the view for the customer to see the listings in.

The On-Off switch appears after you first save the email.

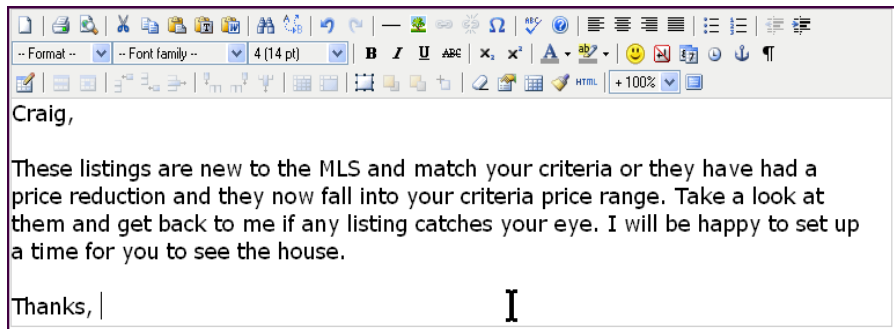
Notify Hint- If you choose Selected Time, then only one email per day will be sent at the chosen time if listings are found.

Notify Time Hint- Choose a time that gives Paragon time to look through that days business activities for Listings. Note also that the "send" time will be Central Standard Time.



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The bottom part of the compose email box gives you the tools to make the email body unique. Put in a somewhat generic message as this message will be sent automatically every time a listing is found.



Now that you have your email set and a message entered, **click Save/Close** to save your work and this also turns on the auto email function.



The Notifications tab will show the notification settings for this saved search and will give you a Quick Action drop down menu on the right.

As Paragon does its work and sends out listing emails, it will keep a 30 day history of emails for you to refer to as needed. You can forward emails from here to other recipients with the link to listings still a part of the email.

