CALIFORNIA ● REAL ESTATE ● DYNAMIC ● DATA

calREDD.com

Auto Prospecting – E-mails with Listing Matches Sent to Your Clients Automatically

Through calREDD™ you have the ability to set your buyers up to receive automatic e-mail notification when new listings matching their criteria come on the market, or when existing listings have a change that now meets their criteria, such as a price reduction.

Create a Saved Search

First, you'll need to create a Saved Search *(Figure 1)* with your client's criteria, such as property type, price range, location, etc.

After you've entered the search criteria, click on **Save Search** *(not Save as Template)*, enter a name for the search in the Save Search dialogue box *(Figure 2)*, and then click on **Save Search.** The saved search will now appear in the **Saved Searches** widget on the homepage dashboard *(Figure 3).*

Tip: *Giving your saved search a generic name such as, Chico 300-500k 4 Bdrm 3 Ba, instead of using a client name, will allow you to assign a saved search to more than one client that may share the same property requirements. The name of the save search will appear on the automatic e-mails sent to your client.*

Figure 1

Figure 2

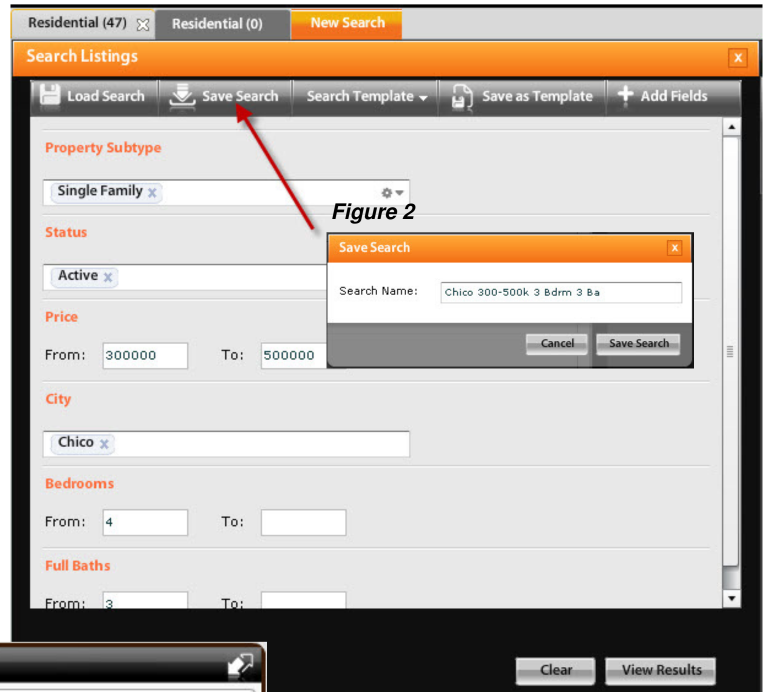
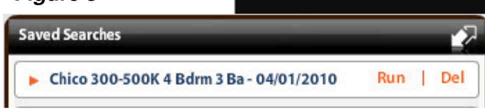


Figure 3



Create a Client

Now that you have created a Saved Search for your client, create a client by clicking on the **Clients** tab.

On the Clients screen, click on **Add New Client** *(Figure 4)*, and then fill in as much information about your client as you desire on the **Add New Client** *(Figure 5)* screen. In order for your client to receive automatic e-mails, you must select a **Client Type** and enter a **First Name, Last Name,** and **E-mail Address.** After you've entered the required information, scroll down and click on **Save**. Your client's name will now appear on the Clients screen *(Figure 6).*

Figure 4

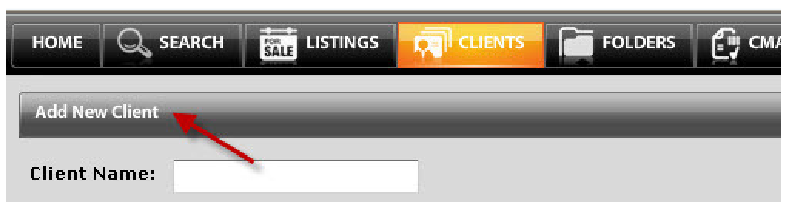


Figure 5

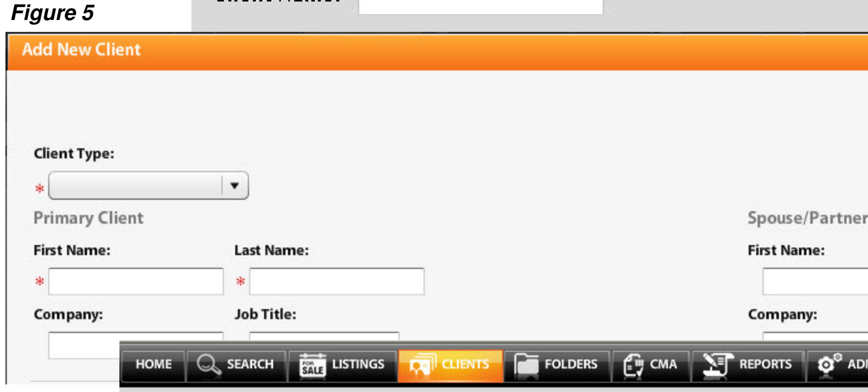
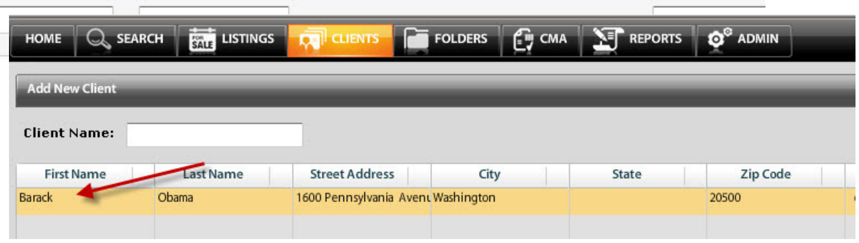


Figure 6



Double click on your client's name to open the **Client Details** screen *(see Figure 6),* click on the **Auto Prospecting** button *(Figure 7),* and then click on **New** *(Figure 8).*

Figure 7

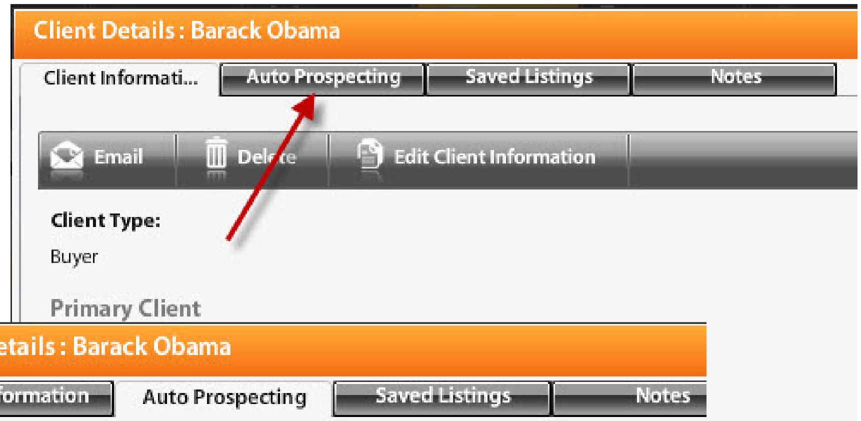
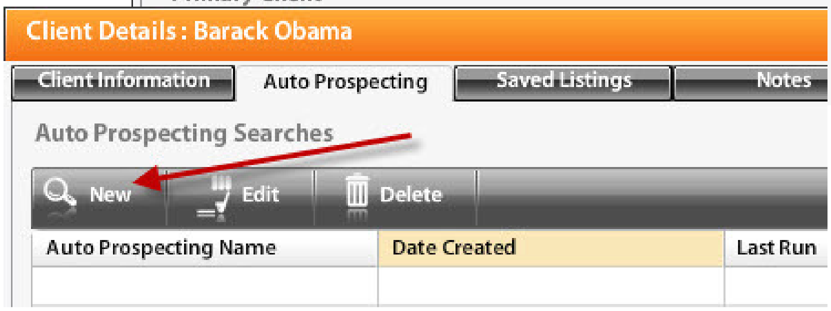


Figure 8



After clicking on **New**, auto prospecting search fields will appear *(Figure 9).* Click the down arrow on **Select Saved Searches** to display the drop-down menu of your saved searches. Select the Saved Search you wish to assign to your client, and then click on **Save** *(Figure 10).*

Figure 9

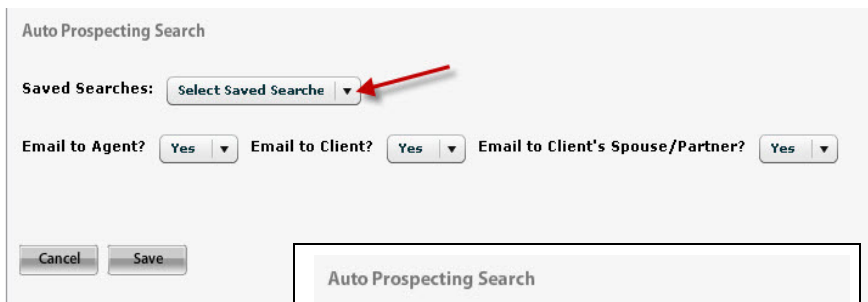
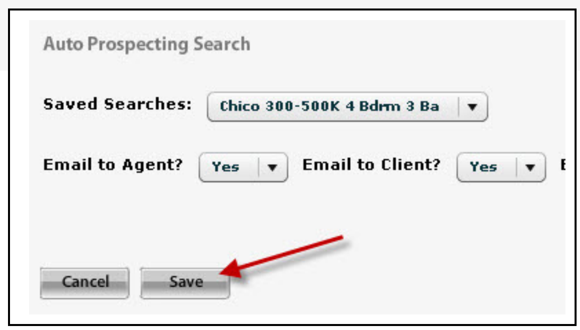


Figure 10



After clicking on Save, the listings matching your client's search criteria will appear *(Figure 11).* At this point, select the listings you want your client to receive by checking the box in front of the listing, and then click on the **Email** button to send them off to your client. Auto Prospecting e-mails are sent out at **12 noon** and at **7:00 PM**. After the initial e-mail, your client will not receive another e-mail until listings matching your client's search criteria become available.

For more detailed instructions on Auto Prospecting, please refer to the calREDD™ User Guide available on **calREDD.com**.

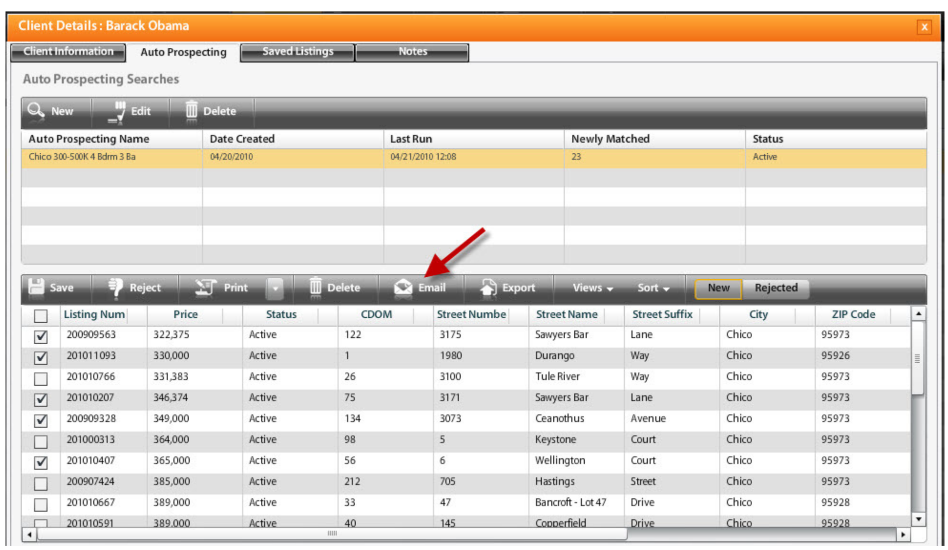


Figure 11