

Client Gateway and Email Auto-notification

An Overview

What is Client Gateway?

- MLS users use their free HAR website to present listings to prospects by posting listings on personal website for each prospect. The "Client Gateway" is completely configurable allowing each agent to choose preferences that fit the way they do business with each prospect.
- Agents and their prospects can bookmark and enter the website at anytime to view new and changed listings that meet the search criteria that the agent sets up for the prospect.
- An auto-notification email is also sent to the client each time there are listing updates with a hyperlink to the "Client Gateway" website, similar to the existing prospect auto-notification emails.
- The agent is able to preview recent activity in the "Agent Detail Reports" on the website by email and on "My Sidebar" in Tempo while the prospect is displayed a "Buyer Detail Report" on their website link.
- New Listings and Reduced Prices are color coded.
- Each Client Gateway expires in 30, 60 or 90 days.
- Prospects have the option to "opt out" of Client Gateway.

What is Email Auto-Notification?

- MLS users create searches specific to their prospects' needs. Emails are sent to the prospect only when there are updates in their search criteria (changes in status, price, or new listings).
- Both the agent and the prospect can receive email auto-notification updates.
- The agent is able to preview "Agent Detail Reports" on "My Sidebar".
- Prospect have the option to "Opt Out" of email-notification.

Create a new Client Gateway for a Prospect

Client Gateway requires a custom search. There are 2 types of custom searches: The first has all the search criteria in the Quick Search form; the second requires additional search criteria not listed in the Quick Search form. Choose one of the following

Create the Custom Search with Quick Search

1. Go to Quick Search in Tempo and add your search criteria
2. Select the Search button and review your listings. If the search results don't reflect the desired results select the *Revise Search* button and change your search criteria.
3. Repeat these steps until you get the desired results.
4. Select the **Save as Custom** button
5. Name your search in the Search Name field
6. Select the **Save and Attach to New Prospect** option
7. Select the **Save** button and **OK**

Create the Custom Search with additional search criteria

1. Select the **Save as Custom** button
2. Name your search
3. Leave the first option (Save as Custom Search Only)
4. Select the **Save** button and **OK**
5. In the new custom search form, select the **Revise Search** button
6. Add the desired field(s) and select the **Save Search** button and **OK**

Save and Attach to a New Prospect

The new prospect form shows the 6 steps on the left of the form

1. Fill out the New Prospect form with the prospect's email address(s)
2. Choose 30, 60 or 90 days for the Client Gateway updates
3. Select the **Save and Continue Prospect Set-up** button
4. Add a description for the New Gateway Search. This description will be on the top of the new prospect's Client Gateway
5. Select the **Continue** button
6. Send notification of new listings: Leave the default to **Auto Notify** your clients by email.
7. Send listings by emailing a link to: Select the first option, **A Personalized Client Gateway**
8. Select the **Continue** button
9. Prepare the new listing notification message
Suggestion: Add the client's name to the subject (Example: Properties for Susan Buyer)
 - Prospect Email History: This option provides links in the prospect's record for all emails sent to the prospect.
 - Tickler Message Option: This process reminds the prospect to check their Client Gateway even if there are no new activities. This process is not compulsory.
10. Select the **Continue** button
 - Refresh Count link: Use this to show recently updated listings with predefined days back increments
 - Add all of these listings to Client Gateway: All listings are sent to Client Gateway
 - Add none of these listings to Client Gateway: No listings are sent to Client Gateway. An email notification with new listings and changed statuses and price will be sent excluding the current listing results.
 - Client Gateway Homepage Greeting: This greeting is added to the top of the prospect's Client Gateway.
11. Select the **Continue** button
12. Notify the prospect of their new Client Gateway by filling out the email form. The total number of listings will be added at the top of the email form.
13. Select the **Send Email Now** button.
You will get a confirmation page.
14. Select one of the three options below the confirmation page
 - a) View Client Gateway, b) Add another Search to this Prospect, or
 - c) I'm Done

Refer to Page 4 for details on each option

Save and Attach to Existing Prospect

1. Refer to Page 2 to set up your Custom Search
2. Name your search
3. Select **Save and Attach to Existing Prospect**
4. Select the **Save** button and **OK**
5. Choose your Prospect
6. Add a description for the New Gateway Search. This description will be on the top of the new prospect's Client Gateway
7. Select the **Continue** button
8. Send notification of new listings: Leave the default to Auto Notify your clients by email.
9. Send listings by emailing a link to: Select the first option, A Personalized Client Gateway
10. Select the **Continue** button
11. Prepare the new listing notification message
Suggestion: Add the client's name to the subject (Properties for Susan Buyer)
 - Prospect Email History: This option provides links in the prospect's record for all emails sent to the prospect.
 - Tickler Message Option: This process reminds the prospect to check their Client Gateway even if there are no new activities. This process is not compulsory.
12. Select the **Continue** button
 - Refresh Count link: Use this to show recently updated listings with predefined days back increments
 - Add all of these listings to Client Gateway: All listings are sent to Client Gateway
 - Add none of these listings to Client Gateway: No listings are sent to Client Gateway. An email notification with new listings and changed statuses and price will be sent excluding the current listing results.
 - Client Gateway Homepage Greeting: This greeting is added to the top of the prospect's Client Gateway.
13. Select the **Continue** button
14. Notify the prospect of their new Client Gateway by filling out the email form. The total number of listings will be added at the top of the email form.
15. Select the **Send Email Now** button.
You will get a confirmation page.
16. Select one of the three options below the confirmation page
 - a) View Client Gateway, b) Add another Search to this Prospect, or
 - c) I'm Done

Create an Email Auto-notification and Attach to a New Prospect

1. Refer to Page 2 for your Custom Search
 2. Name your Search
 3. Select **Save and Attach to New Prospect**
 4. Fill out the New Prospect form with the prospect's email address(s)
 5. Choose 30, 60 or 90 days for the Client Gateway updates
 6. Select the **Save and Continue Prospect Set-up** button
 7. Add the description for the Email Auto-notification
 8. Select the **Continue** button
 9. Send notification of new listings: Leave the default to Auto Notify your clients by email.
 10. Send listings by emailing a link to: select Property Listings Information Only
 11. Select the desired Email Formats (these formats are sent as links)
 12. Select the **Continue** button
 17. Prepare the new listing notification message
- Suggestion: Add the client's name to the subject (Properties for Susan Buyer)

- Prospect Email History: This option provides links in the prospect's record for all emails sent to the prospect.
- Tickler Message Option: This process reminds the prospect to check their Client Gateway even if there are no new activities. This process is not compulsory.

18. Select the **Continue** button

- Refresh Count link: Use this to show recently updated listings with predefined days back increments
- Email all of these listings to the Prospect: Select this option to send all listings to the Prospect
- Email only listings that have been modified within the last 15, 30, 45, 60, or 90 days to the Prospect: Choose this option to send fewer listings to your client.
- Email none of the listings: This option will attach the custom search to the Prospect but it will not send them any links to listings.

19. Select the **Continue** button

20. Fill out the email form and select the desired report links. Examples of how the links will look in the email are to the right of the report options
21. Select the **Send Email Now** button.

Select *Add Another Search to this Prospect* and following the Wizard or select *I'm Done*.

Modify a Prospect's Email Notification Account Settings

Change the settings to the way in which a prospect receives an email notification by doing the following:

1. Point to **Prospects**, and **View Prospect List**
2. Click on the link of the Prospect
3. Click on **Search/Updates** on the left of the Prospect settings
4. Each Custom Search is listed. Click on the Settings link to change the way in which your prospect received email notifications
5. Your first option is to Send notification automatically or manually.
Your second option is by Personal Client Gateway or Property Listing Information.
Both have a new listing notification message.
6. Select the **Save** button after you've made your choice. Your changes will take effect after midnight. If there are changes in the market, your client will be notified.