# Everything You Wanted to Know About Prospecting/Auto Emails but Were Afraid to Ask: Ask Technical Terry



*Ask Technical Terry is a series RMLS™ aims to offer once a month. RMLS™ subscribers will drive the content—submit any question about RMLS™ to Technical Terry in the comments or by emailing communications@rmls.com. Don't be shy—we won't identify you by name.*

**Dear TT-**

**I'm hoping you can clear up some questions I have about Prospecting/Auto Email. First, I have a hard time understanding the difference between the two terms. Can you help with that? It seems like they're used interchangeably and they can't both mean the same thing! (Can they?) Second, I suspect I'm not setting up my clients correctly because they never seem to get the first set of listings that match the criteria I've set up for them. What should I do?**

**Struggling in Stayton**

Dear SS-

I'm happy to help! And I hear you about those two terms being used interchangeably. Let's start with the term "prospecting." **Prospecting is simply a set of search criteria you've saved in RMLS*web* in the Prospecting Profile module**. In most cases you will name the saved criteria something related to a specific client.

Remember to NOT use your client's full name here, because if

you allow Reverse Prospecting (I know, another confusing term) and your client's search criteria matches the descriptive elements of a listing being reversed prospected, the subscriber running the reverse prospecting search would be able to see your client's entire name! Just their name, nothing else, but still probably not a good idea!

Are we good here with that the term "prospecting" means in RMLS*web*? Let's move on.

Now how do I use this set of saved search criteria going forward? In most cases you will associate this Prospecting Profile with a contact in your saved contacts on RMLS*web*, and then set up Auto Email, the process whereby RMLS*web* searches and automatically sends out listing matches to your client. (Note that you can associate up to five unique contacts per Prospecting Profile!) You could add the client info in Contact Manager (Toolkit->Contact Manager) before or after creating the Prospecting profile—whichever works for you.

Once you've chosen a saved contact or created a new contact to add to the Prospecting Profile you can then set up the Auto Email variables. You have a lot of choices here: frequency of delivery, type of client report, whether to CC yourself, customization of the subject line, and so on.

Here's a key piece of information for you, SS: **only new matches** will be sent to your client(s) on the day(s) chosen in the Auto Email setup. **The initial matches must be selected manually and sent in a separate email message!**

Once you have this process set up and running automatically, RMLS*web* will alert you of new matches by illuminating the New Prospect Matches button in the upper left corner of the RMLS*web* desktop page. You may also be receiving the emails if you chose to CC yourself when setting up the Auto Email. If you did not choose to be copied on the emails you can still view the email history by navigating to Prospecting Profiles,

finding the contact name, and clicking "History" in the contact record.

I sure hope this info helps. Remember that we have a variety of documents in RMLS*web* covering all of this. The following are particularly excellent resources for your question:

Document 1737: How to Use the Auto Email Feature
Document 1772: Reverse Prospecting
Put RMLS*web* to Work for You

Technical Terry