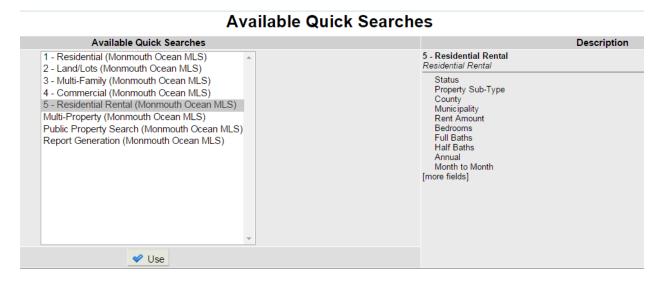# How to Set a Contact up for Subscription E-mails

To start, begin your search for your customer by going to **Search**, and **Quick Search**. From there, select the search template that applies to your customer's property needs. For this example, the customer is looking for the following:

Rental Properties:

Available, 2 Bedroom, 2 Full Bathrooms, Annual Rentals, Monmouth County, allowing Dogs.

To begin, select the applicable Search, in this case, **5 – Residential Rental,** and click **Use.**

The system will then display the search screen. I can input the fields my customer is looking for here.

Once the search parameters are complete, go to **Save** on the upper right corner of the screen and select **Save Search**

Once the Save Search screen appears, you are required to enter in a Search Name. The search description is optional. If filled out, the customer will receive a copy of the information in it. Keep in mind, this says search description, so you can enter in the search parameters if desired.
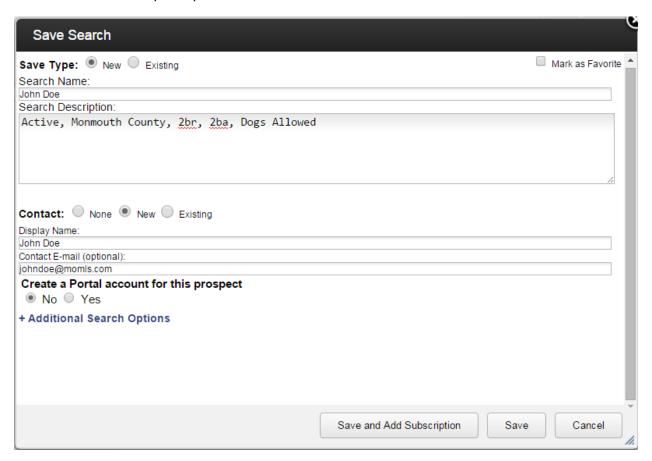
Below the Search Description, there is a Contact selection. When setting up an email subscription, change the Contact toggle from **None** to either **"New"** or **"Existing"**

New – a brand new contact that has not been entered into Contact Management before.

Existing – a contact that you have been in contact with via Contact Management.

You will then be asked whether or not to create a portal account for the prospect, please be advised the portal is a separate feature. *For information on the portal, please view the Video Tutorial located under the Help drop-down on the upper right corner. Or view the How To Guide which can be found under Daily Functions > MLS Intranet.*

For this instance I've kept the portal off.

Once the page is filled out, click on **Save and Add Subscription**.

The window will now display the **Add Subscription** page:
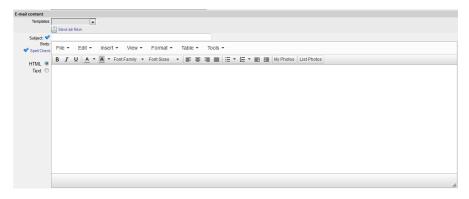

Subscription Name:	This is saved as the search name by default. You can change this if you would like, but it's not necessary.
Preview Mode ON:	This optional feature, if turned on, puts the responsibility solely on you to filter the listings and approve what you would like to send to your contact. You would receive the listings, and your contact would not receive anything unless you "Approve" the listing.
Preview Mode OFF:	This is the default setting. When preview mode is off, you are set to receive the Agent/Private copy of the listing, the contact will receive the Customer/Public copy of the listing, and you will also receive an e-mail receipt once they click to view a listing in an e-mail

Weekly:	This is the default selection pertaining to how often your contact will receive listings IF something meets their search parameter. The default for weekly is set to go out Daily. You can keep all days checked, or select the individual days you would like your contact to receive listings, IF a listing meets their search parameters.
Monthly:	This option would alert the contact of listings once a month. All listings that meet their parameters throughout the time period would be clustered together.
ASAP	This option would alert the contact of listings once they meet their parameters. Please be advised that if the listing was added with no photos prior to it going live, your contact may receive no photos in the initial e-mail. This option is great for contacts with a very specific search. It is not recommended for vague or broad searches

View (Interactive)	This refers to a page that will allow the recipient of the auto e-mail to click through the listing(s) and view the list view of the listing(s), photos, maps, and compare listings on a customer friendly viewpoint. No listing agent information will be provided in the e-mails, all reports will be the public/"Customer-Friendly" report.

Example of Interactive View:

E-mail content	This message will be sent each time your customer receives a new listing update. You can specify what you would like in the Subject and Body of the e-mail.

Once you have completed the e-mail, click **Next** on the bottom of the screen. Your contact will receive an opt-in email asking them to confirm that they want to receive listing information from the Flexmls system. Once they click the link to confirm (this is included in the body of the opt-in email), they will begin to receive listings on an automatic basis if a new listing is added to the MLS that meets their search parameters.

DISCLAIMER

If you have selected the option to receive an email notification of when your contact views the email, please be advised this means you will receive notification if your contact clicks the link to view listings.