

# Changing the Custom Search

A Custom Search can be revised at any time. However, if that Custom Search is attached to a Prospect and the Prospect is using a Client Web, several important factors need to be considered as to the impact the revised search has on the Client Web.

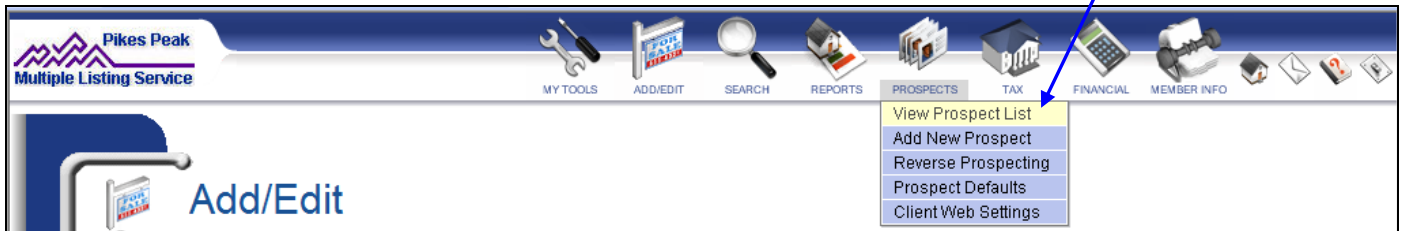
When a search that is attached to a Prospect's Client Web is revised **in any way**, the TEMPO® PPMLS considers the listings currently on the Client Web as no longer matching the search criteria and removes all properties from the list. Any listings in folders will remain on the Client Web. On the next auto-notification, the Client Web is re-populated with listings in the PPMLS that match the revised search criteria. However, when the auto-notification process searches for the matching properties, it only searches the past **90 days**. Therefore, your client will never see the listings that were added/modified prior to the 90 days.

If this is not acceptable to the Agent and the listings prior to the 90 days need to be added to the Client Web, there are two methods to accomplish this.

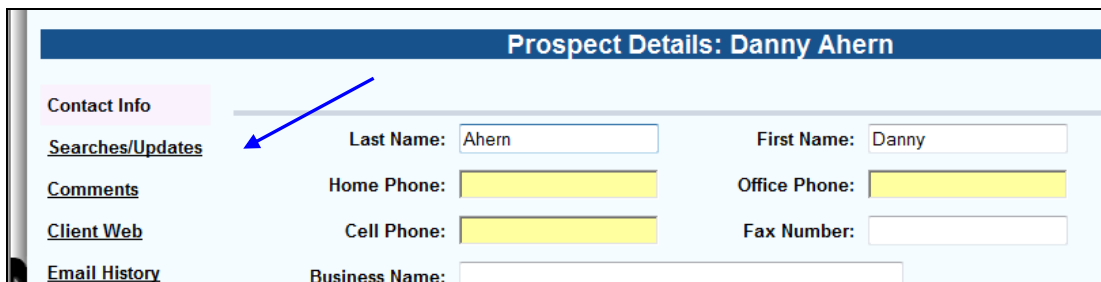
The first method involves changing the time stamp of the last search and entering the date you want the next auto-notification process to begin the search. The second method involves deleting the search from the Prospect and re-attaching it to find all listings in the PPMLS that match the revised search.

## Changing the Time Stamp

**Step 1:** Mouse over Prospects on the icon menu bar and select View Prospect List.



**Step 2:** On the View Prospect List, click on the name of the client whose search was revised. The Contact Info page is displayed. On the menu on the left, click on the Searches/Updates link.



**Step 3:** Click on the Settings link on the right side of the screen.

**Prospect Details: Danny Ahern**

Contact Info

Searches/Updates

Search Name	Notify Type	Status	Last Web Site Access
Ahern	Auto-Notify	Last Email: Mar 27 2007 1:23PM	<a href="#">Criteria</a> <a href="#">Settings</a> <a href="#">Delete</a>

Comments

Client Web

Email History

Add Another Custom Search to Prospect

**Step 4:** The Last Run / Timestamp: appears at the top of the page. Click in the box, delete the date and time and enter the date you want the auto-notification process to begin the search to re-populate the Client Web. When the next scheduled auto-notification runs, it will look at this Timestamp and start the search on that date.

**Prospect Details: Danny Ahern**

Contact Info

Searches/Updates

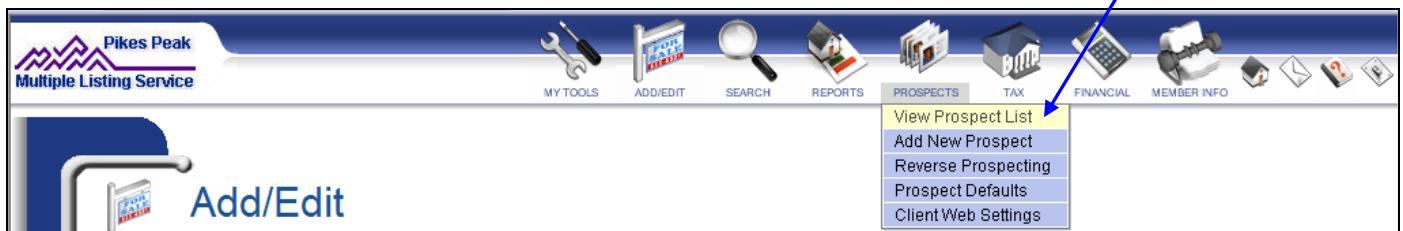
Search Name: Ahern

Last Run / Timestamp: 3/27/2007 13:09:00

Click the Save button on the bottom of the page.

## Deleting and Re-attaching the Search

**Step 1:** Mouse over Prospects on the icon menu bar and select View Prospect List.



**Step 2:** On the View Prospect List, click on the name of the client whose search was revised. The Contact Info page is displayed. On the menu on the left, click on the Searches/Updates link.

**Prospect Details: Danny Ahern**

Contact Info

Searches/Updates

Comments

Client Web

Email History

Last Name: Ahern

First Name: Danny

Home Phone: [Yellow Box]

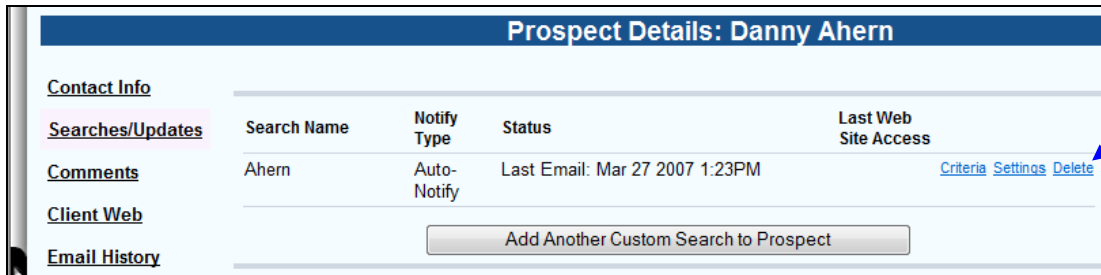
Office Phone: [Yellow Box]

Cell Phone: [Yellow Box]

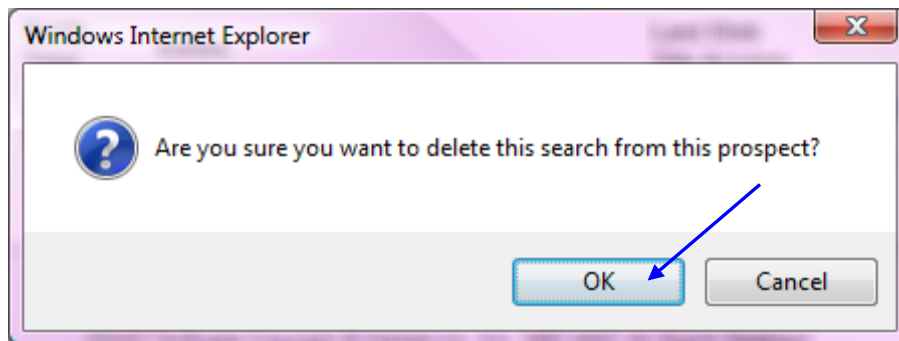
Fax Number: [Empty Box]

Business Name: [Empty Box]

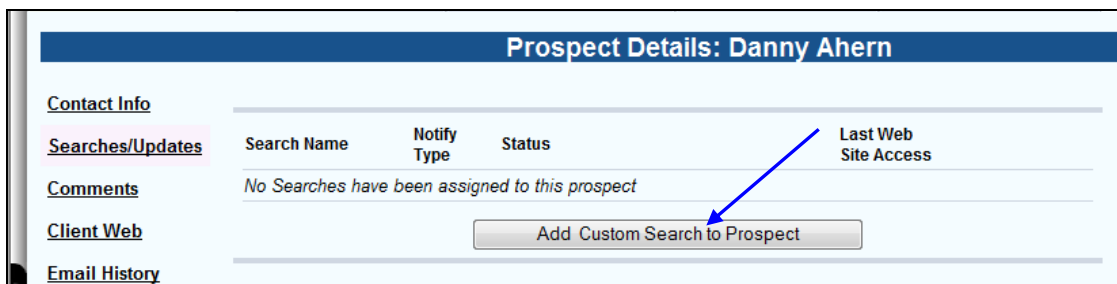
**Step 3:** Click on the Delete link on the right side of the screen.



**Step 4:** Click OK. You are only deleting the search from this prospect. You are not deleting the search and you are not deleting the Prospect, you are just “disconnecting” them.



**Step 5:** The screen reappears showing that the Search is no longer attached. Click on the Add Custom Search to Prospect button.



**Step 6:** Click on Select an existing saved search and select the search to re-attach to the Prospect. With the search selected, click on the Continue button.

**Prospect Wizard: Danny Ahern**

Select an existing saved search to attach to this prospect, which will include all criteria associated with that search. Or, if you wish to establish new search criteria for this prospect, select which property type you wish to search.

res - Ahern  
Only searches with saved criteria are available

OR

Select a property type for a new search...

Continue >>

**Step 7:** The screen showing the number of listings that match this search appears. This number represents all listings in the PPMLS that match the revised criteria. Click on the Continue button on the bottom of the screen.

**Prospect Wizard: Danny Ahern**

33 listing(s) currently match this search.

Search Name: Ahern

Description:

This is how your prospect will see this search described.

Allow Reverse Prospecting:  Yes  No

<< Revise Search

Continue >>

**Step 8:** Verify or change the notification method and type of link and click on Continue on the bottom of the screen.

**Prospect Wizard: Danny Ahern**

Specify how you wish to notify this prospect of properties that fit their search criteria.

Send notification of new listings:  Auto-Notify - email sent daily to prospect if new listings are available  Manual Notify - personally run the prospect search and select which listings to send as often/seldom as you wish

Send listings by emailing a link to:  A personalized Client Web -- a web site created exclusively for this prospect to view and organize listings that fit their criteria  Property Listing information only

Continue >>

**Step 9:** Verify the settings on the next screen and click on Continue on the bottom of the screen.

**Prospect Wizard: Danny Ahern**

Specify the message text to use when notifying this prospect of newly available listings.

**New Listings Notification Message**

Email to: Contact  peggy.ferron@ppar.net  
 Me:  pferron@ppar.org  
 CC:   
 BCC:

Subject:

Message:

Include Signature

Prospect Email History - Display Automatic emails:  Yes  No

**Tickler Message**

This message is sent weekly, bi-weekly, or monthly, based on the frequency you specify, regardless of whether there are new listings that fit the prospect's criteria.

Message Frequency:  Never  Weekly  Every Two Weeks  Monthly

Message Template:  [< Edit this Template](#)

Send Tickler To:  Client's Email <peggy.ferron@ppar.net>  
 My Email <pferron@ppar.org>

**Step 10:** Choose to Add **all** of the listings to the Client Web on the next screen and click the Continue button on the bottom of the screen.

**Prospect Wizard: Danny Ahern**

33 listing(s) currently match this search.

[Refresh the count](#) to display only listings that have been listed/modified within the last  days.

Do you want to:

Add **all** of these listings to the Client Web  
 Add **none** of these listings to the Client Web

Client Web Home Page Greeting:

**Step 11:** The next screen contains the Initial Notification Email. Note at the top of the screen it indicates that the listings have already been added to the Client Web (Portal). Since your client is already aware of their webpage and do not need the initial email message again, click the **Save Prospect without Sending Email** button on the bottom of the page.

**Prospect Wizard: Danny Ahern**

33 property listings were added to this prospect's Portal

**To:**       **Cc:**

**From:** pferron@ppar.org      **Bcc:**

Send a copy to my email      Separate multiple addresses with commas

**Subject:** Your personal Web page


**Message:**  
 I have created a personalized web page for you. When you receive an email notification that there are new properties to review, you will be directed to your web page when you click on the link in the email.  
 Look at each listing and leave feedback for me so I know which properties you want to see and which ones you don't like and for what reason.  
 If you have any questions, don't hesitate to call me.

**Links:** A link to the Client Web will be included in the message.

**Signature:**  Use my email signature

Pikes Peak Association of REALTORS  
430 N. Tejon St.  
Colorado Springs, CO

**Step 12:** You are returned to the View Prospect List. To verify that the listings are on the Client Web, you can click on the  icon on the right side of the screen.

## Reverse Prospecting

When an Agent has active Listings in the database, Reverse Prospect Searches may be run. Reverse Prospecting allows Listings Agents to locate other Prospects, marked as "Allow Reverse Prospecting – Yes" throughout the *TEMPO™ PPMLS* system whose Search criteria match the data entered on their Listing.

**Note:** The Listing Agent who runs a Reverse Prospect Search will NOT see a Prospect's name. They will only see the Prospect ID and the name of the Agent who entered the Prospect. Agents may "hide" their Prospects from Reverse Prospecting Searches. Refer to the Adding A New Prospect section of this manual for details.

**Step 1:** To run a Reverse Prospect Search, mouse over Prospects on the icon menu bar and then click on Reverse Prospecting.

**Step 2:** Your Active Listings will appear. Choose a listing(s) to view potential Prospects by clicking the checkboxes in front of your active listings OR click the "Check All Listings" button and then click "Search."