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.

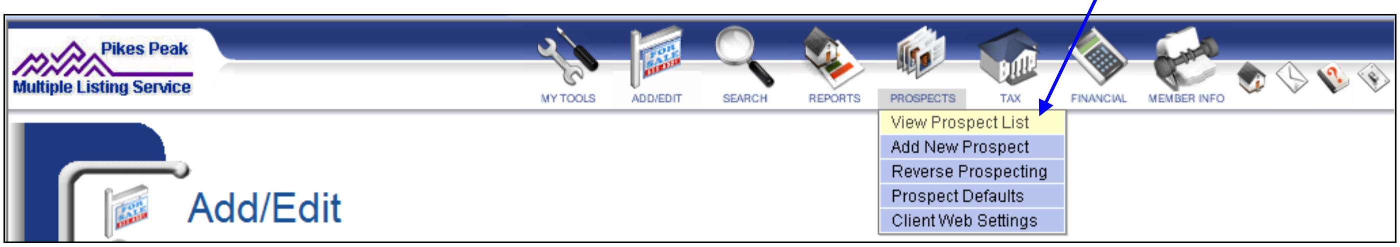
When a search that is attached to a Prospect's Client Web is revised **in any way,** the TEMPO® PPMLS considers the listings currently on the Client Web as no longer matching the search criteria and removes all properties from the list. Any listings in folders will remain on the Client Web. On the next 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.

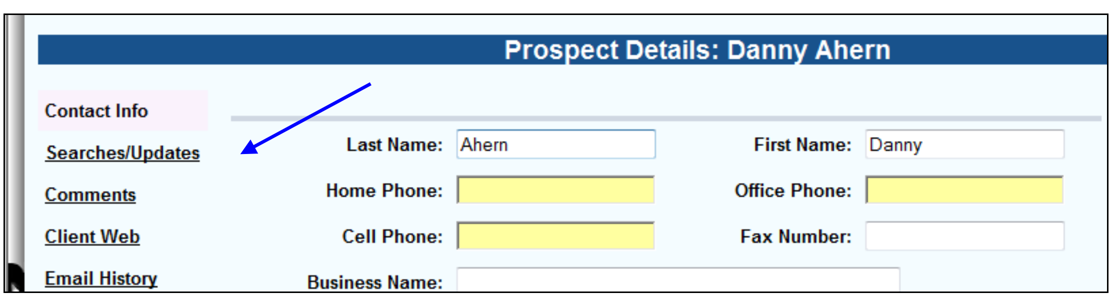
The first method involves changing the time stamp of the last search and entering the date you want the next auto-notification process to begin the search. The second method involves deleting the search from the Prospect and re-attaching it to find all listings in the PPMLS that match the revised search.

Changing the Time Stamp

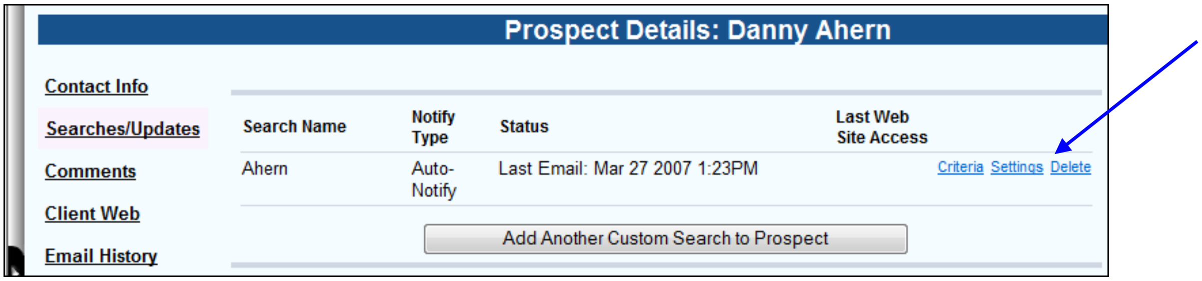
Step 1: Mouse over Prospects on the icon menu bar and select View Prospect List.



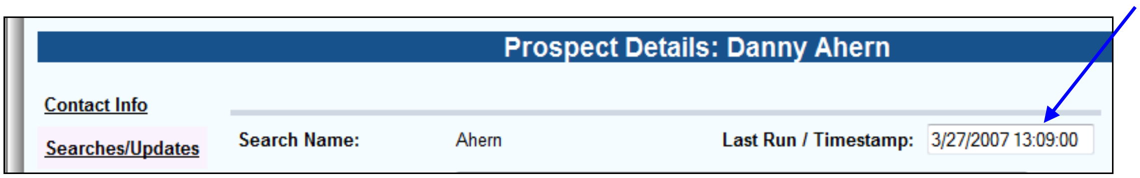
Step 2: On the View Prospect List, click on the name of the client whose search was revised. The Contact Info page is displayed. On the menu on the left, click on the Searches/Updates link.



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



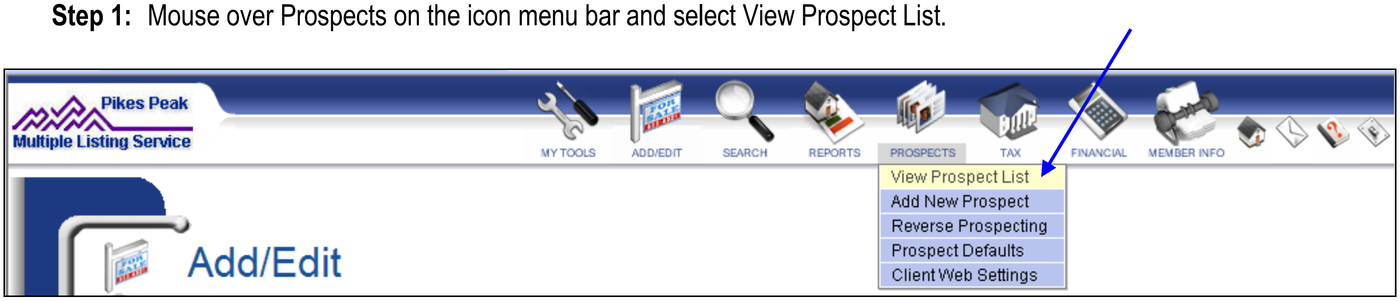
Step 4: The Last Run / Timestamp: appears at the top of the page. Click in the box, delete the date and time and enter the date you want the auto-notification process to begin the search to re-populate the Client Web. When the next scheduled auto-notification runs, it will look at this Timestamp and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



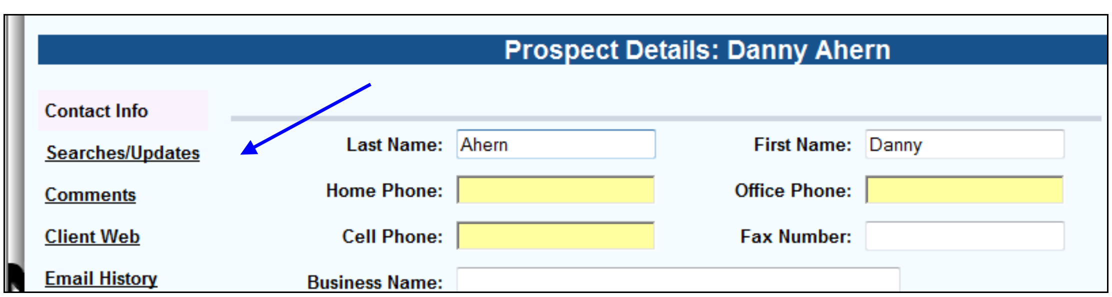
Click the Save button on the bottom of the page.

Deleting and Re-attaching the Search

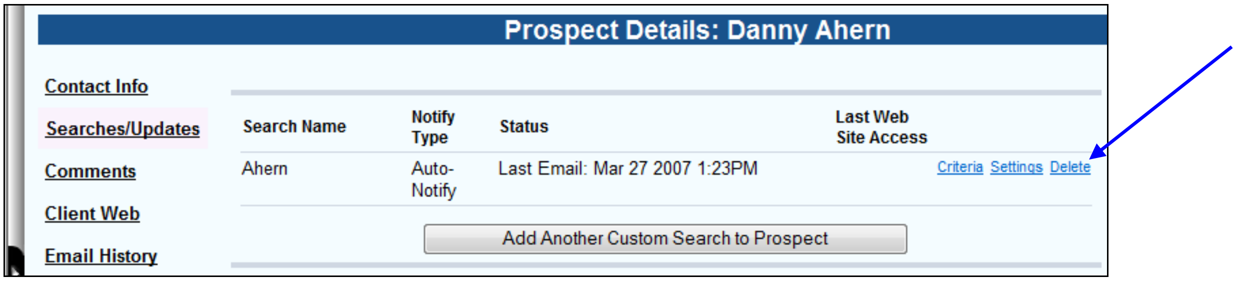
Step 1: Mouse over Prospects on the icon menu bar and select View Prospect List.



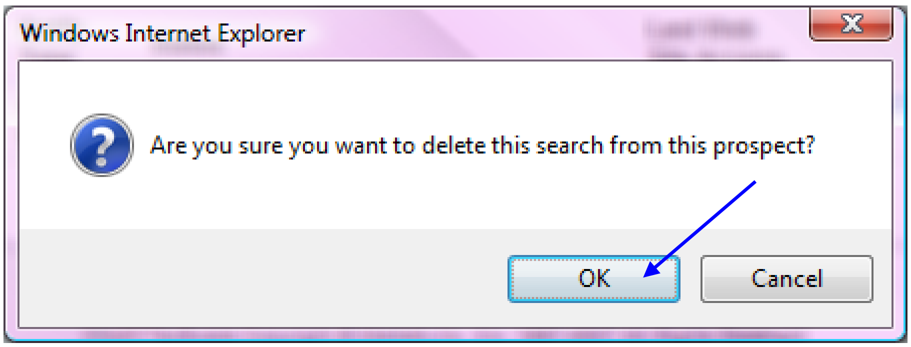
Step 2: On the View Prospect List, click on the name of the client whose search was revised. The Contact Info page is displayed. On the menu on the left, click on the Searches/Updates link.



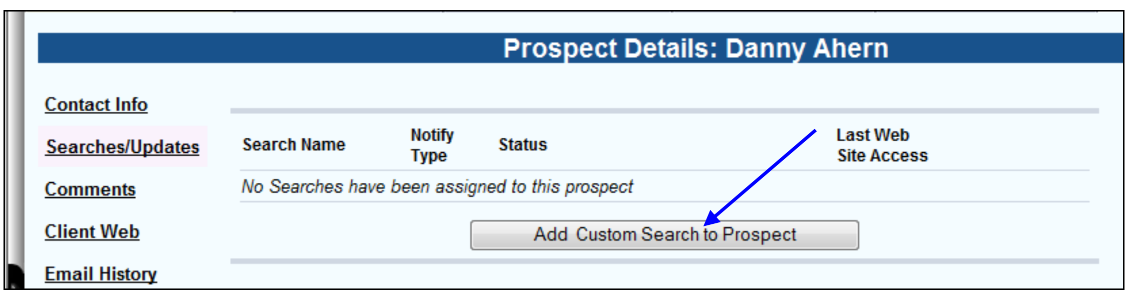
Step 3: Click on the Delete link on the right side of the screen.



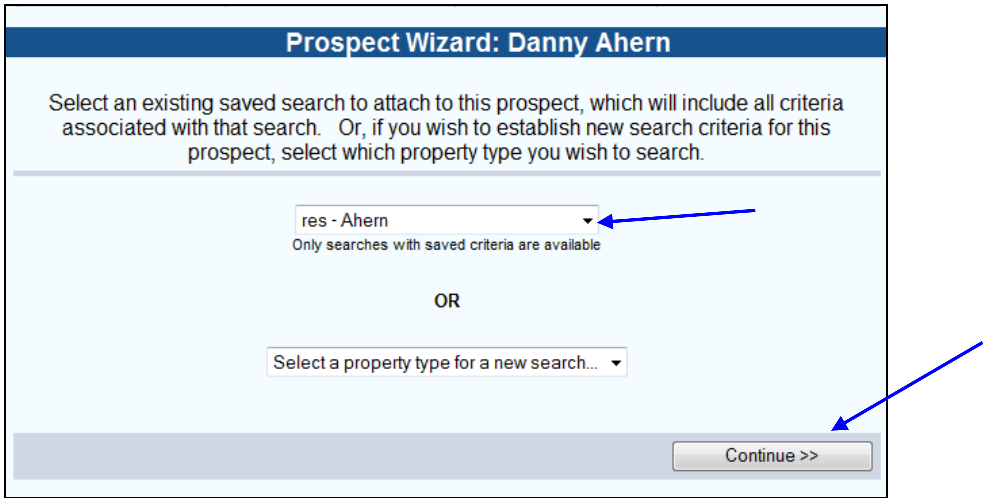
Step 4: Click OK. You are only deleting the search from this prospect. You are not deleting the search and you are not deleting the Prospect, you are just "disconnecting" them.



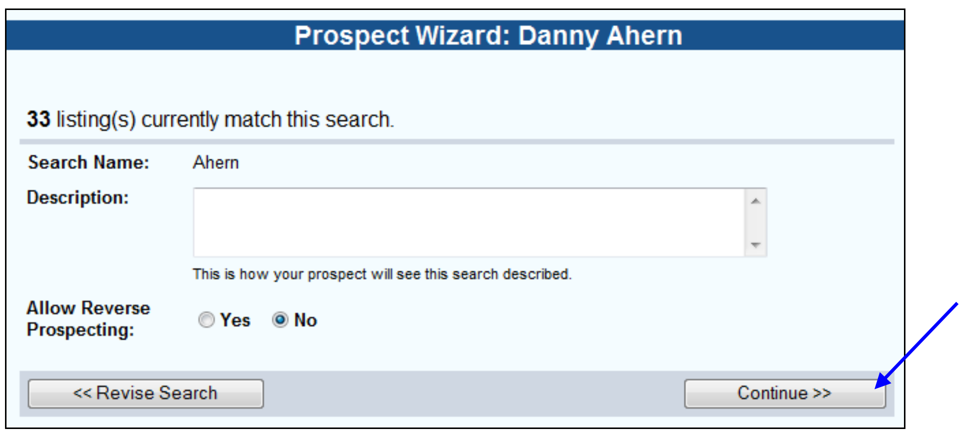
Step 5: The screen reappears showing that the Search is no longer attached. Click on the Add Custom Search to Prospect button.



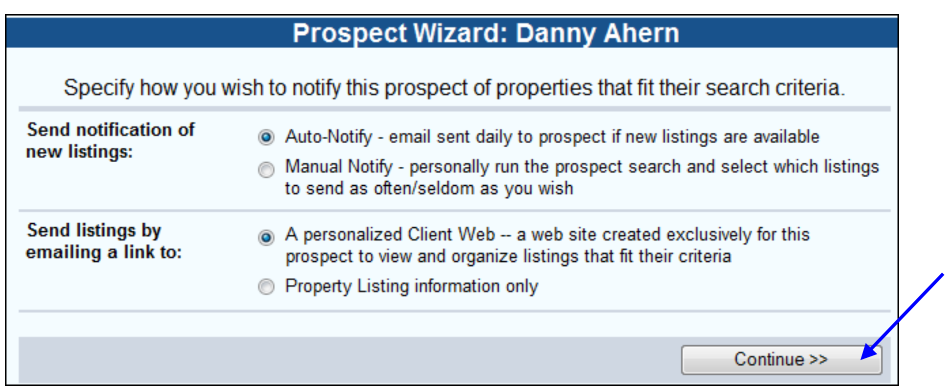
Step 6: Click on Select an existing saved search and select the search to re-attach to the Prospect. With the search selected, click on the Continue button.



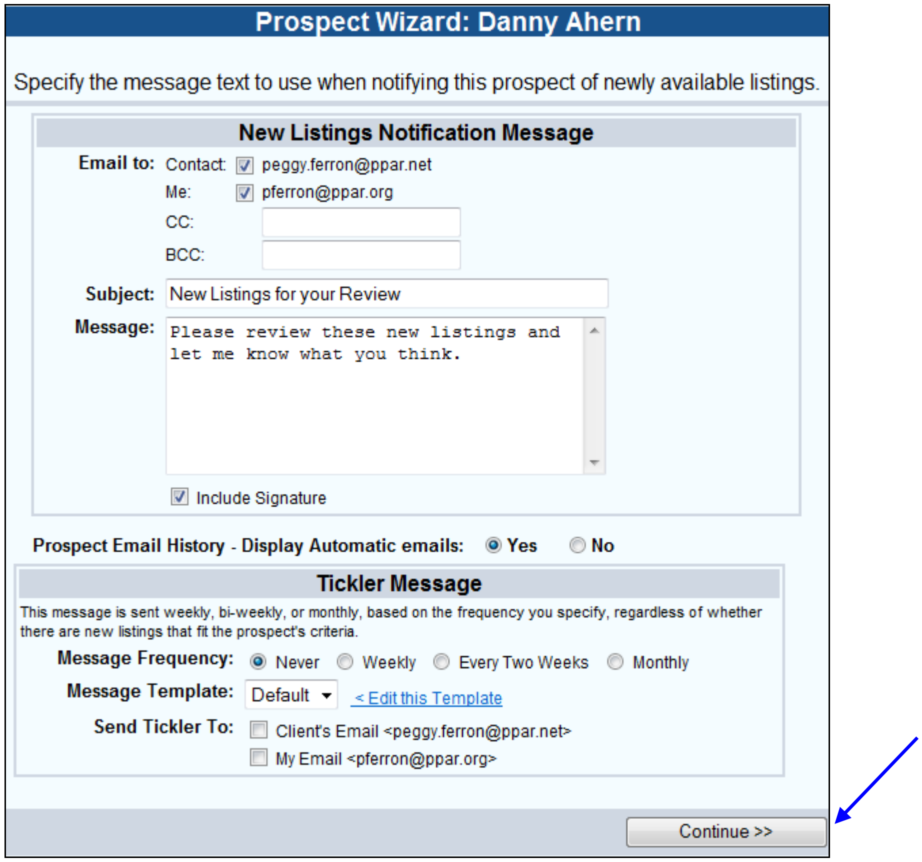
Step 7: The screen showing the number of listings that match this search appears. This number represents all listings in the PPMLS that match the revised criteria. Click on the Continue button on the bottom of the screen.



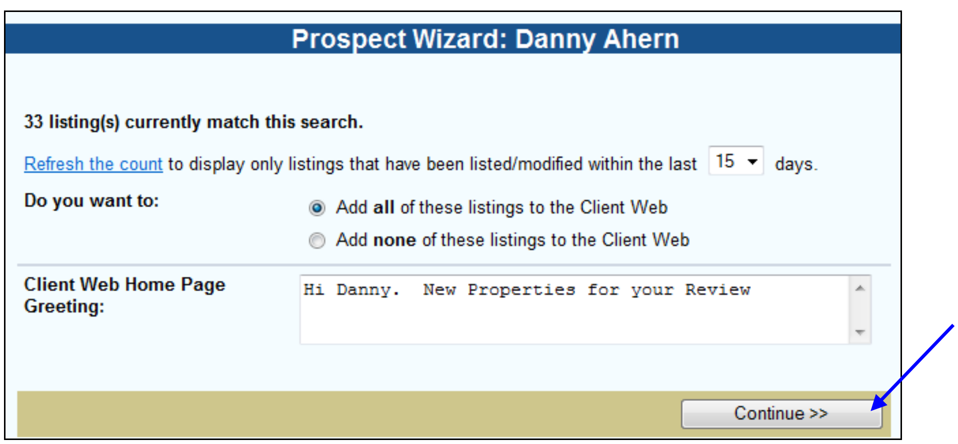
Step 8: Verify or change the notification method and type of link and click on Continue on the bottom of the screen.



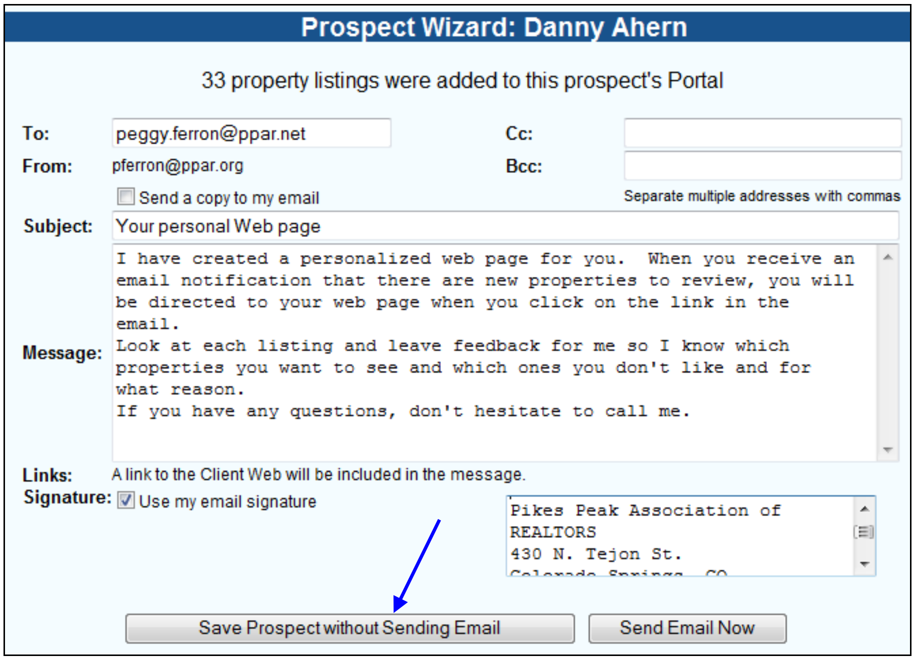
Step 9: Verify the settings on the next screen and click on Continue on the bottom of the screen.



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.



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.



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."