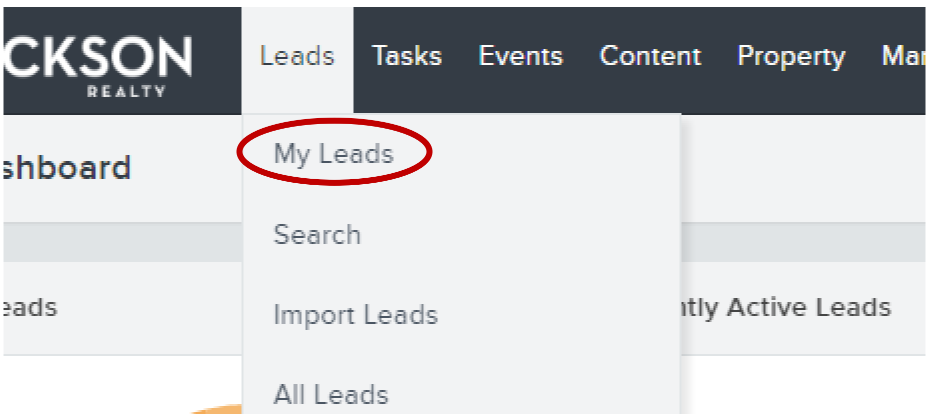
Sending Market Reports Automatically

- This guide describes how to sign your clients or contacts up to receive Market Reports, Newsletters, and Holiday messages automatically.
- These Reports are addressed from you to your leads.

*For this example, we will use the Market Profile Report – Reno/Sparks

➢ **Adding your leads to the list associated with each Market Report**

1. Sign in to your account. Go to your leads by selecting My Leads under the category, Leads, at the top.

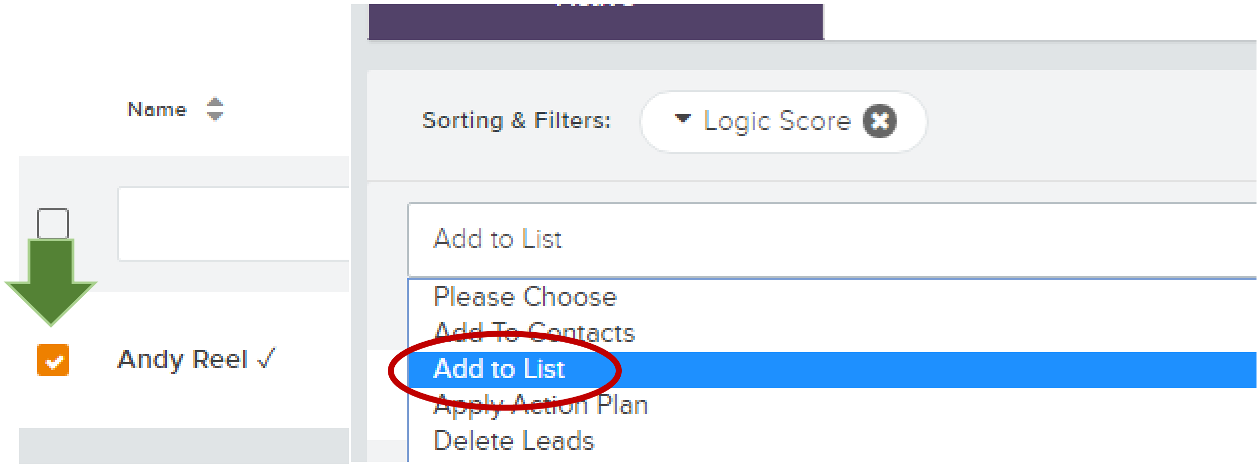


2. Select all the leads that you would like to receive the Market Profile Report – Reno/Sparks by checking the box next to their name.

Things to note:

- You must check the box next to the names of the leads on your first page of leads, then follow steps 3-5 to add them to the correct list BEFORE moving to your second page of leads.
- You have to repeat this process for every page of leads
- If you want to add all of your leads to an auto-flow list, follow steps 3 and 4 below, then refer to the asterisk below * before proceeding to step 5. You can disregard step 6 for that particular auto-flow piece

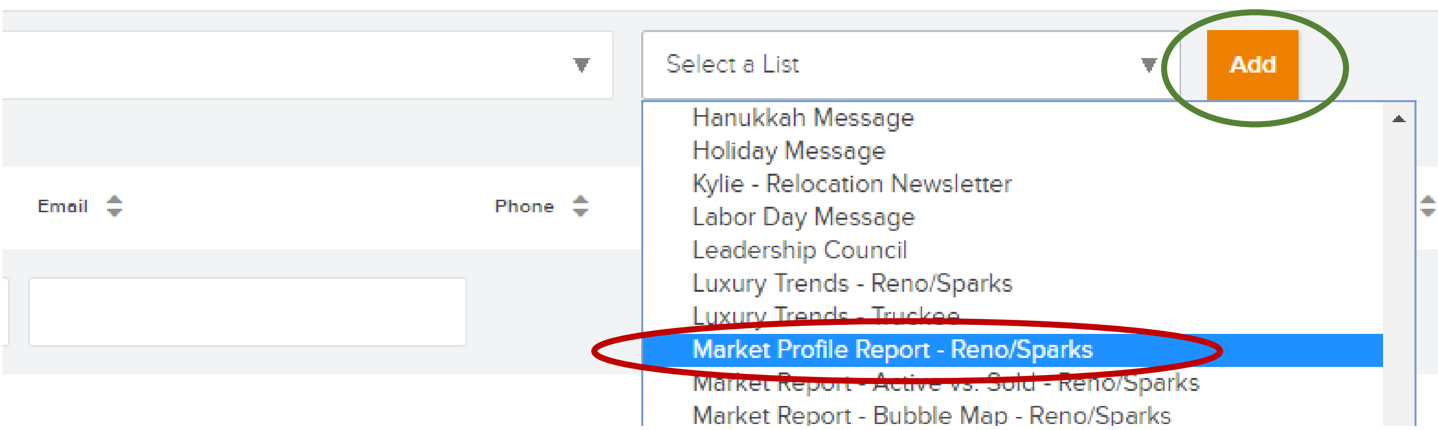
3. After you check the boxes on page 1, under Please Choose select "Add to list"



4. Another dialog box will appear to select which list to add the leads to. For this example, we would select Market Profile Report – Reno/Sparks

5. Click the Add button to add all the leads that you have selected to the list you have selected.

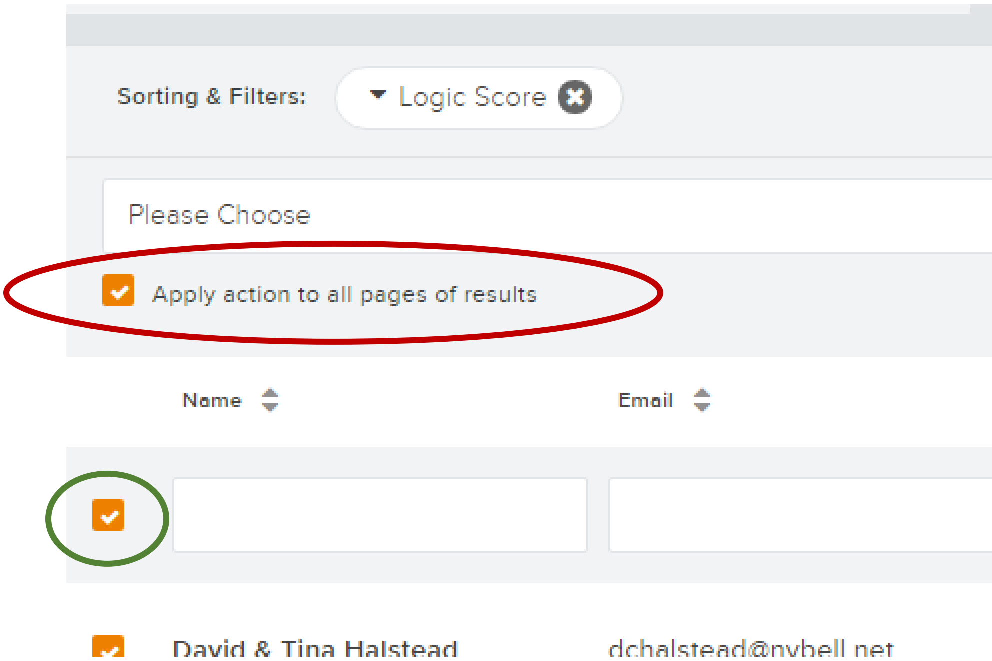
6. Once you click add, you can continue to page 2 and repeat the process to add more.



- **That is the entire process for this one report. The email will be sent to the leads that you have added to that list. It will say Dear (their first name) at the top and be addressed from you with your information.**
- **There are a few things to note:**

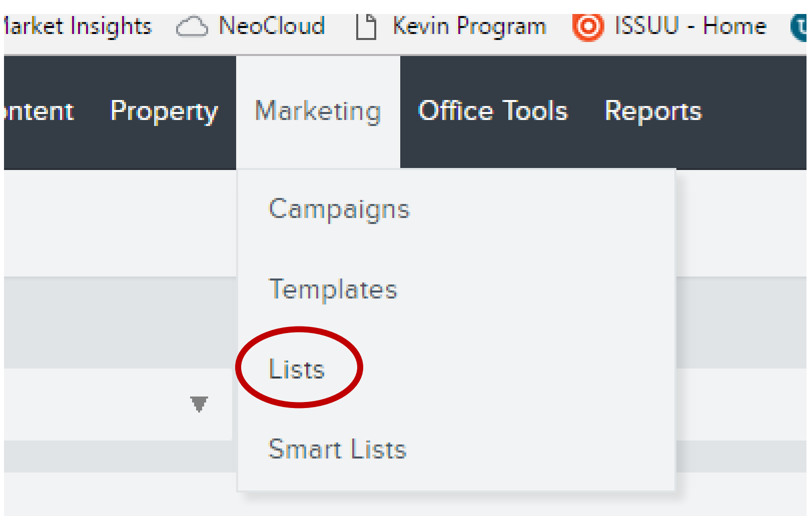
1. You must repeat this process and add all the leads to the list for each report that you would like to send to them.
2. You will only have to do this once. The leads will receive the report whenever the report is updated until you remove them from the list.
3. To view the schedule for when the reports are updated and sent out as well as images of what the email with the report will look like click here.

*There is a box above the list of leads that says "apply action to all pages of results" that appears after you have checked the check all box. If you have both of those boxes checked, any action that you do to the leads will occur to all leads on all pages.

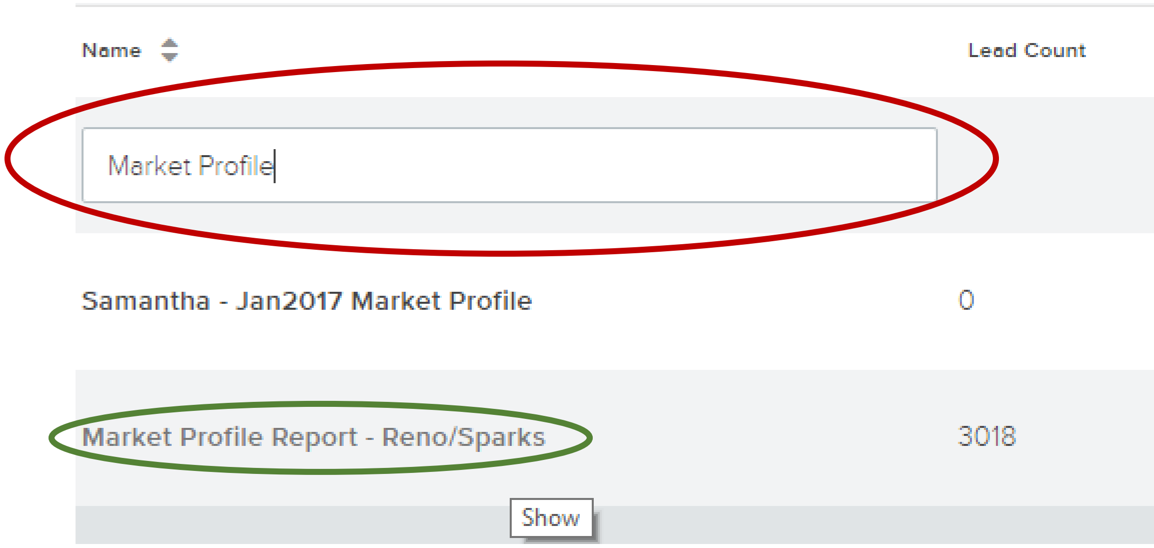


- **Viewing who is on a certain list**

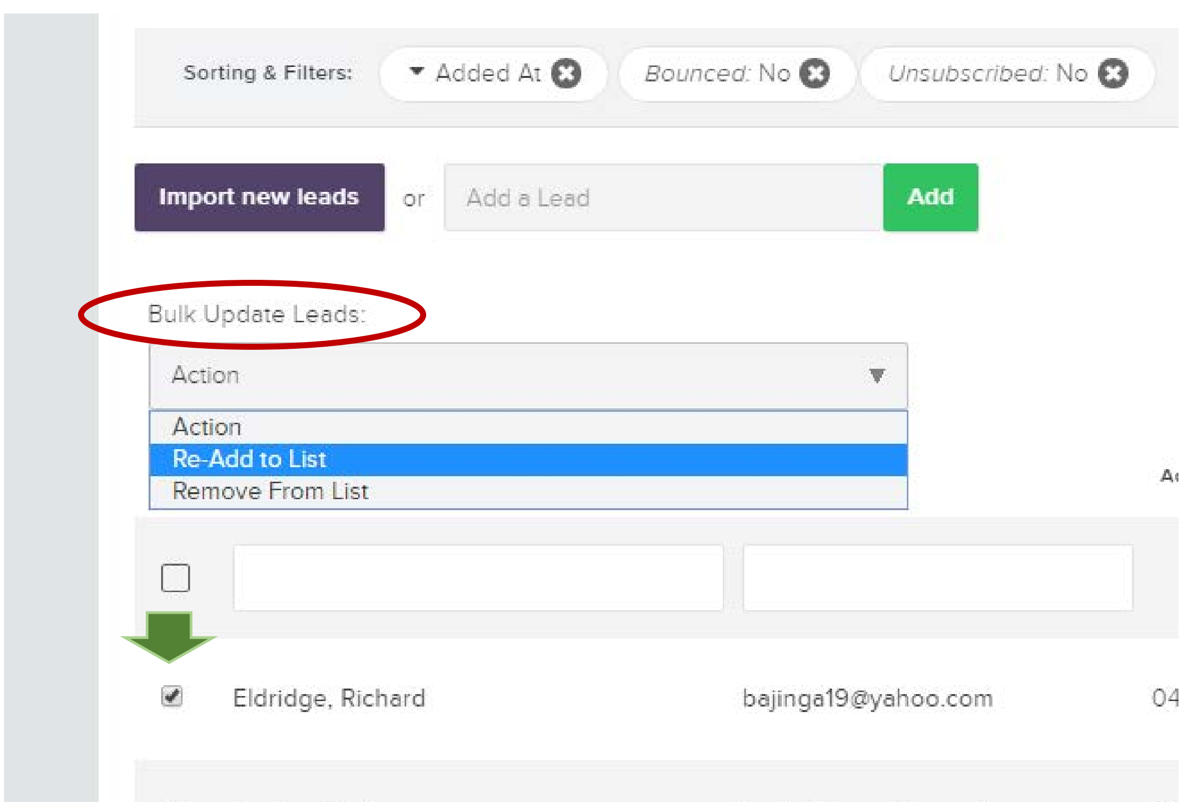
1. Click Lists under the Marketing tab



2. Select the list you want to view by clicking on the name of the list
   - You can type in the search field to search through all lists by name

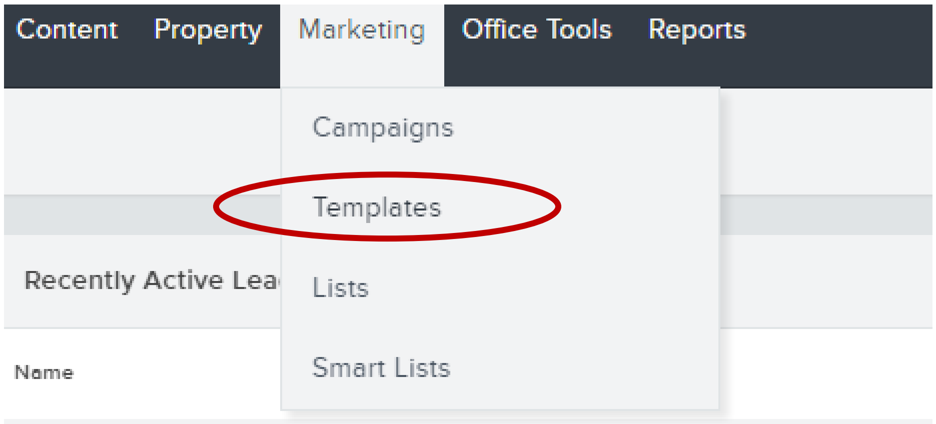


3. On the next page, scroll down to see which of your leads are on that particular list. From there you can remove or re-add certain leads by:
4. checking the boxes next to their names
5. Go to the "Bulk update leads" dropdown
6. Select remove or re-add to list
7. Click update

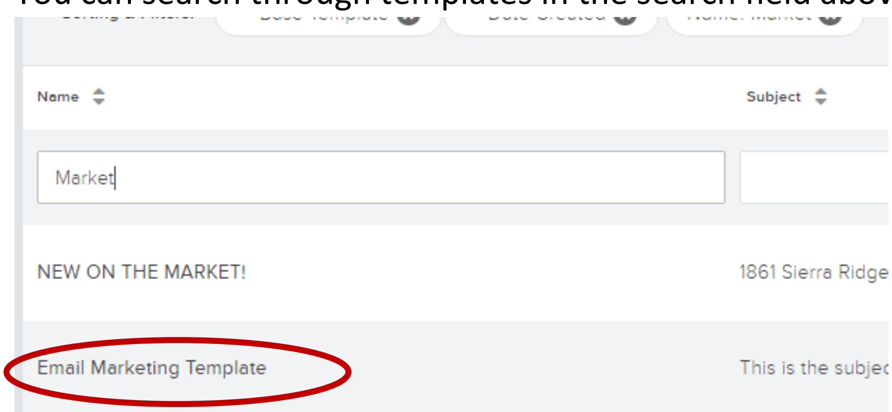


- **How to find and read the reports/newsletters/holiday messages**

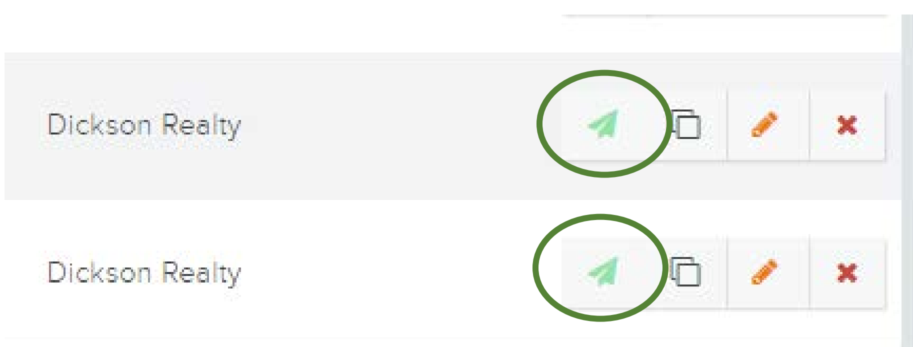
1. Go to templates under the marketing tab



2. Click on the name of the template on the left to read it.
    a. You can search through templates in the search field above



3. If you would like to see what the template looks like when it is sent from you to your leads, click the send test email button on the far right.
    a. It will ask you enter one of your lead's names. It will not email that lead. It is just to fill out the Dear (leads first name), greeting.
    b. It will send the email to you
    c. It will come from no-reply@sequoiarealestatesolutions.com
    d. When it is sent out to the people you add to the list, it will come from you.



4. You will notice that there is an email signature built into the templates. The information for that is pulled from your profile. If something is missing, you will have to add it to your profile. There is another help document called Editing Your Profile that can help you with that.