



Auto-Notification

Set-up (first time only)

1. Log into RealTracs and click "My Page", then click on the "Edit Site Preferences and Signature".
2. Check the box labeled "Use Signature", and fill in your contact information, much like what your business card contains.
3. Uncheck the box beside "Show search on buyers tab". Click "Save".
4. Go to the main RealTracs home page by clicking "RTM" from the menu at the top of the site.
5. Click the "Edit" button in the upper-right corner of the "Quick Links" box.
6. Click the arrow beside one of the drop down menus and select "Buyers List". Click "Save".

You now have a shortcut or "Quick Link" to this area of the system.

Adding a New Buyer and Turning on Auto-Notification

1. Click on the Quick Link, "Buyers List".
2. Click the "Add" button.
3. Add the client's contact information including email. (More than one email address can be entered into the "Email 1" field by separating them with a comma.)
4. Click "Save".
5. You will be taken immediately to a window where property type can be selected. Select your desired property type and click "Save".
6. You will then be directed to the Custom Search screen where fields are selected for the search. To move a field from "Available Fields" to "Selected Fields", highlight the selected search field and click the ">" sign; or double click on the field from the "Available Fields" window.
7. Once all desired search fields are moved to "Selected Fields", click "Save".
8. Enter your search criteria into the fields you selected and click the green "Search" button from the menu at the left.
9. This will produce a pop-up window with the results of your search. If the results are desirable, click "Use These Results" - otherwise, click "Revise Search" to further modify your original search.
10. After clicking "Use These Results", you will be taken to the search results page with a list of your properties.
11. Choose the properties you wish to email to your client by checking the appropriate box on the left, and then clicking "Email Listings" from the "Select a Function" drop down menu.
12. Verify your information, enter the required subject, choose a Buyer Report format, and click "Send". A window verifying the email was sent will display; click "OK".
13. Once the email is sent, you can either mark those listings as "Saved" or simply go back to the "Buyers List". To mark the listings as "Saved", use the "Select a Function" drop down menu and select "Mark as Saved". This will automatically take you back to the Buyers List. If you do not want to save, click the "Back to Buyers" button just above your list of properties.
14. Once you are back to your list of buyers, you will notice an updated date in the buyer's row. This will be the starting date for the next search. You are now ready to turn on the automatic update feature.
15. Click "No" in the auto-notify column for your buyer.
16. In the pop-up window, check the box labeled "Activate Auto-Notification".
17. If you want the emails to come to both you and your client, check both the "To:" and the "Send Me a Copy" boxes. If you would like the updates to come to only you, click the "Send Me a Copy" box only.
18. Enter the required subject. Helpful Tip: It is a good idea to put the client name somewhere in the subject so your email copies will identify them.
19. Select a format. (Buyer ¼ Page, Buyer Full Page, or Buyer CMA).
20. Click "Save".
21. The system will begin looking overnight for new, back on the market, and price changed listings and email them as you requested in your Auto-Notification options.