

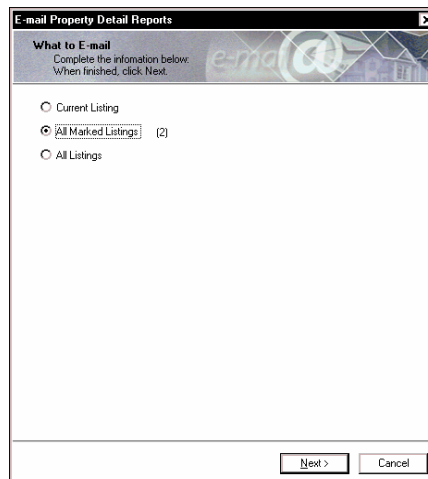
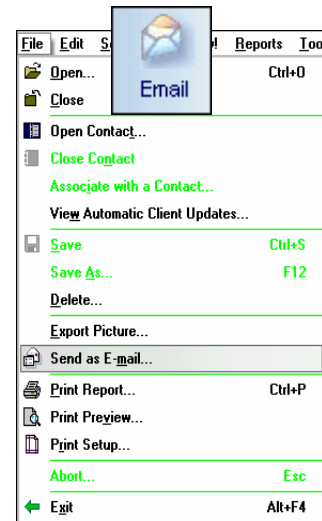
E-MAILING REPORTS, THE PROPERTY LISTING TABLE AND FINANCIALS

If you have an *Internet Service Provider and an E-mail account*, you can E-mail reports, the Property Listing Table and financials to your client from the program. The program will open an E-mail Wizard and guide you through the steps.

E-mailing Reports

Follow the steps below to E-mail a report to your client.

1. Submit the search for your client or open a saved file. The properties will appear in the Property Listing Table.
2. Open the desired report to E-mail, for example, you may want to E-mail the Photo or Customer Report to your client.
3. Click on **File > Send as E-mail** or click on the **Email** button on your Features and Functions Toolbar. This will open the **What to E-mail** in the E-mail Property Detail Reports window as seen below.
4. Select which properties from the Property Listing Table you want to E-mail by checking one of the options listed. If you don't want to E-mail all the properties in the Property Listing Table, then mark the properties you want to send. If you want to send only one property, then highlight the property by clicking on it. Click Next to get to move to the next screen.



5. The **Format of E-mail** window opens. The program automatically selects the **E-mail as a Browser link** option. Keep this option selected if you would like to send your client a professionally formatted e-mail, which includes a link to the reports that you sent them, plus

guidance and assistance to view them. If you want to send the e-mail as attachments versus a link, then select the second option. Click Next to continue.

E-mail Property Detail Reports

Format of E-mail
Complete the information below.
When finished, click Next.

E-mail as a browser link

- No attachment to open.
- View all reports in a browser environment.
- No waiting for E-mail to download.
- This is the recommended format since most recipients can view it.

E-mail Property Reports with an HTML Summary. (or Save the Attachment^{***})

- Allows the recipient to view all properties in one continuous report.
- Requires Internet Explorer.

^{***} Select this option if you want to save the attachment, or to use the attachment with AOL or a Web-based E-mail program.

< Back Next > Cancel

6. The **Who to E-mail** window opens. Enter the address of the person you are sending the reports. Your E-mail address, Name, Signature and Website Address fields are automatically populated if you entered the information in the Primary Agent tab under Options > Preferences in Tutorial 2. Enter your Subject and Message. Click Next to continue.

E-mail Property Detail Reports

Who to E-mail
Complete the information below.
When finished, click Next.

Address Book Separate Multiple Addresses using commas

*To:

Cc:

*Your E-mail Address:

Your Name:

Website Address:

Subject:

Message:

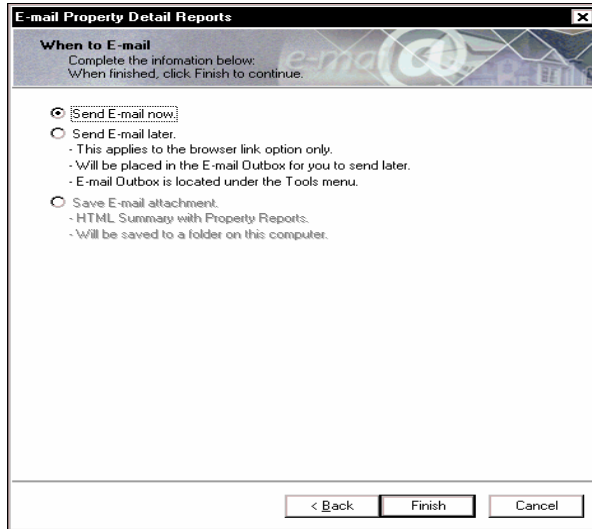
Signature:

Also, send me a copy of this E-mail.

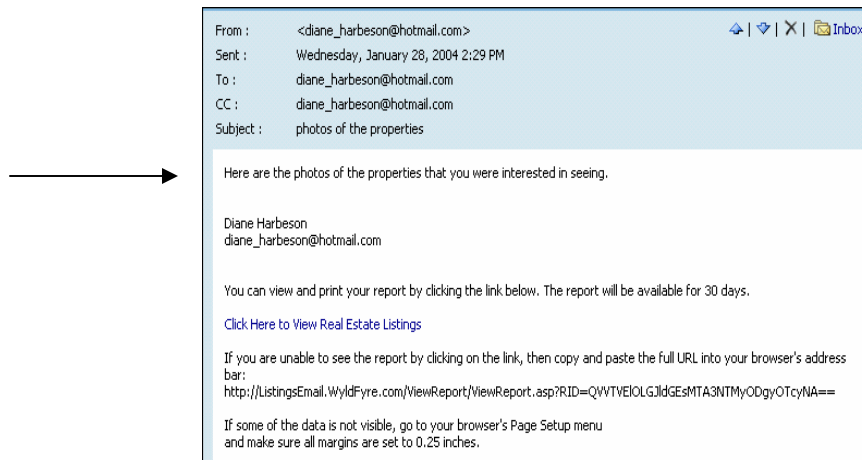
* Required

< Back Next > Cancel

7. The **When to E-mail** window opens. Select the option to either send the E-mail now or Send E-mail later. The third option will be disabled unless you are sending the e-mail with attachments. If you select **Send E-mail later**, see E-mailing at a Later Time in Tutorial 13. Click Finish to send the e-mail.



8. Below is an example of the E-mail that is sent to your client. As you can see, the E-mail includes a link to the reports that you have sent.



9. Click on the link and the Listings Summary window will open as seen on the next page.

Status	ML #	Address	Price	Beds	Baths	Year
<input type="checkbox"/>	A	6200 DUNN ST	\$100,000	3	2	1979
<input type="checkbox"/>	A	704 HUNTINGDON PL	\$102,000	3	2	1971
<input type="checkbox"/>	A	3204 BARNESLEY DR	\$102,000	3	2	1980
<input type="checkbox"/>	A	7605 CLYDESDALE DR	\$102,900	3	2	1980
<input type="checkbox"/>	A	8908 JESSE JAMES DR	\$103,000	3	2	1983
<input type="checkbox"/>	A	7212 SHADYWOOD DR	\$105,000	3	2	1974
<input type="checkbox"/>	A	6207 WAYCROSS DR	\$105,000	3	2	1971
<input type="checkbox"/>	A	9617 HOLLY SPRINGS DR	\$106,000	3	2	1984
<input type="checkbox"/>	A	1115 STONEOAK	\$107,000	3	2	1974
<input type="checkbox"/>	A	1104 KENYON DR	\$107,000	3	2	1975
<input type="checkbox"/>	A	7730 CROFTWOOD DR	\$107,500	3	2	1978
<input type="checkbox"/>	A	509 RAMBLE LN	\$108,500	3	2	1966

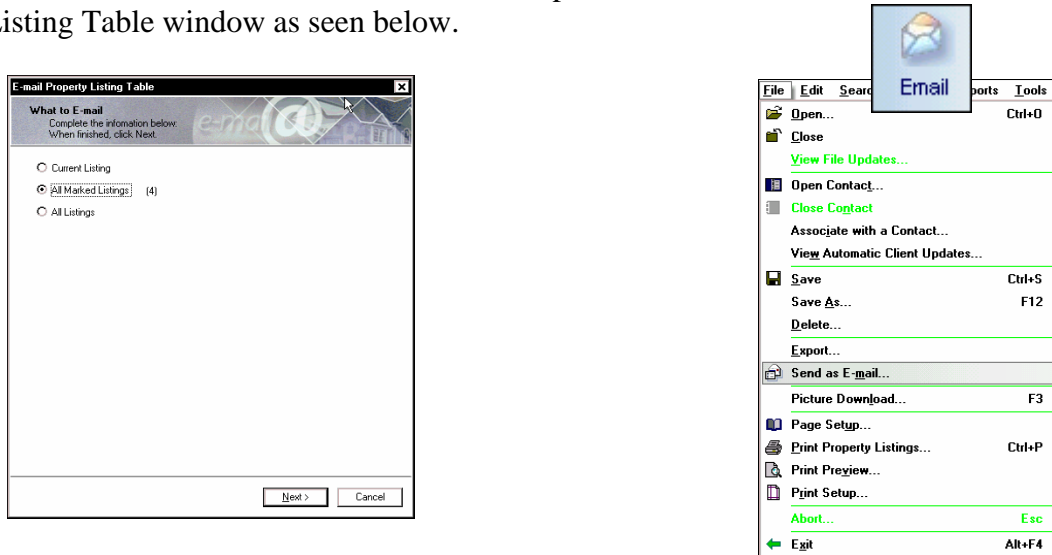
10. You have the option to **print summary** or **print marked reports**.

11. Click on a listing and the report type that was E-mailed will open.

E-mailing the Property Listing Table

You can E-mail the Property Listing Table to your client.

1. Submit the search for your client or open a saved file.
2. Customize your listings by removing properties, columns, etc.
3. While at the Property Listing Table, click on **File > Send as E-mail** or click the **Email** button on your Features and Functions Toolbar. This opens the **What to E-mail** in the E-mail Property Listing Table window as seen below.



- Follow steps 4 – 10 above in E-mailing Reports section found earlier in this Tutorial..

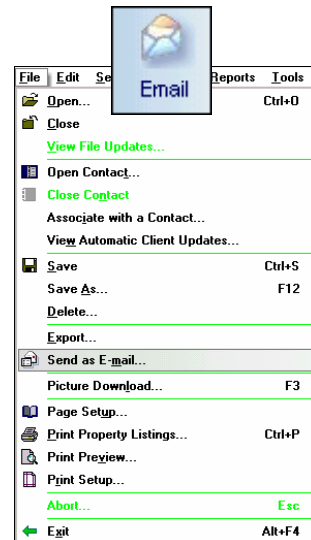
ML#	St	Street Address	Ar	Un	Lp	Schl	Type	Liv/Beds	Fb/Hb	Sqft	Const	Yrbt
748625	A	8200 DUNN ST	10			\$100,000 AUSTIN ISD	HOUSE	1 3	2 0	1397	1SIDEMAS	1979
742462	A	704 HUNTINGDON PL	10			\$102,000 AUSTIN ISD	HOUSE	1 3	2 0	1027	FRMSTONE	1971
742877	A	3204 BARNSELY DR	10			\$102,000 AUSTIN ISD	HOUSE	1 3	2 0	1200	BRICK /FRAME	1980
741801	A	7605 CLYDESDALE DR	10			\$102,900 AUSTIN ISD	HOUSE	1 3	2 0	1273	1SIDEMAS	1980
745181	A	8908 JESSE JAMES DR	10			\$103,000 AUSTIN ISD	HOUSE	1 3	2 0	1648	1SIDEMAS	1983
737061	A	7212 SHADYWOOD DR	10			\$105,000 AUSTIN ISD	HOUSE	1 3	2 0	1010	1SIDEMAS	1974
744178	A	6207 WAYCROSS DR	10			\$105,000 AUSTIN ISD	HOUSE	1 3	2 0	1112	1SIDEMAS/FRMSTONE	1971
742426	A	9617 HOLLY SPRINGS DR	10			\$106,000 AUSTIN ISD	HOUSE	1 3	2 0	1103	1SIDEMAS	1984
702258	A	1115 STONEOAK	10			\$107,000 AUSTIN ISD	HOUSE	1 3	2 0	1212	3SIDEMAS	1974

Example of Property Listing Table

E-mailing Financials

You can E-mail the Financials to your client.

- Open your saved Financial.
- Continue to click on the Next button until you have opened the financial and are looking at the report.
- While at the financial report, click on **File > Send as E-mail** or click on the **Email** button on your Features and Functions Toolbar. This opens the **What to E-mail** in the E-mail Financial window as seen below.



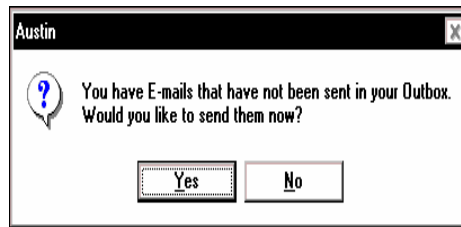
4. Follow steps 4 – 10 above in the E-mailing Reports section found earlier in this Tutorial.



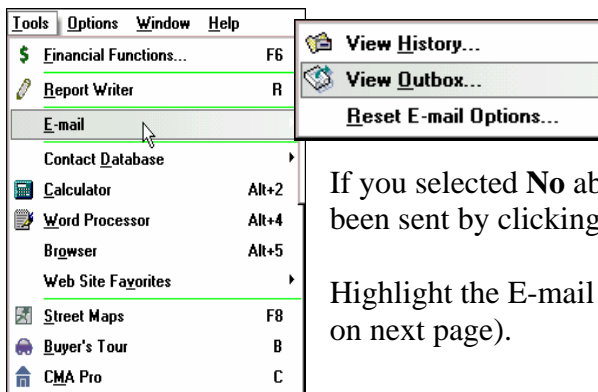
Example of Amortization Schedule

E-mailing at a Later Time

If you decided to send your E-mail at a later time, then the next time you open the program, a message will appear on your screen as seen below. Click **Yes** to have the E-mail(s) sent right away.

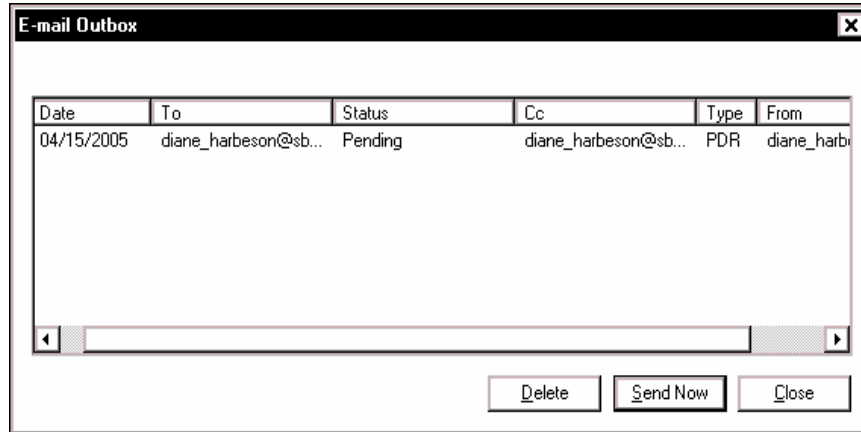


Viewing Outbox

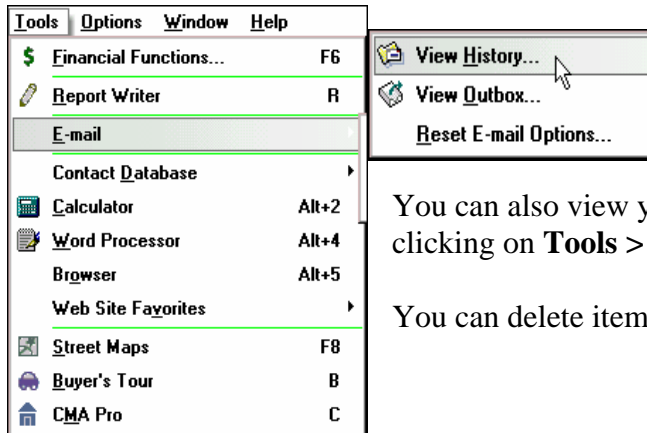


If you selected **No** above, then you can view your E-mail(s) that have not been sent by clicking on **Tools > E-mail > View Outbox**.

Highlight the E-mail to send and click the **Send Now** button (See Diagram on next page).

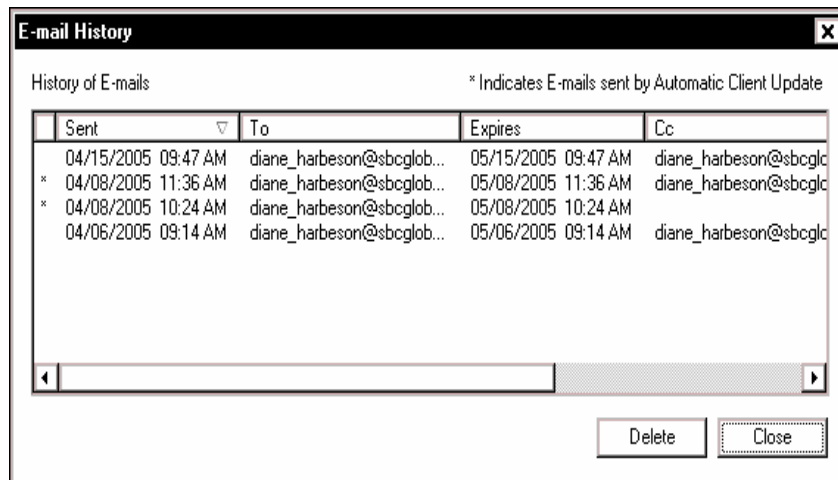


Viewing History

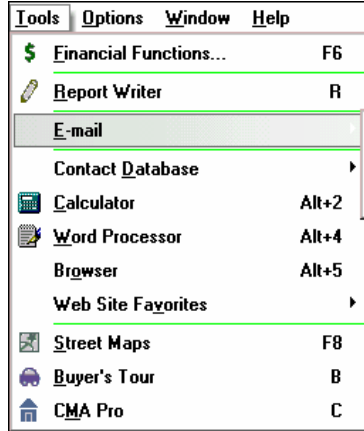


You can also view your history of E-mails that have been sent out by clicking on **Tools > E-mail > View History**.

You can delete items off the list by using the Delete button.



Resetting E-mail Options



If you want to reset your E-mail so that the program looks at the default e-mail program loaded on your computer, then click **Tools > E-mail > Reset E-mail Options**. Click Yes to accept your default e-mail.

