



Subscriptions and Portals – Key Takeaways

- 1) If you are using subscriptions, make sure to check the **Opt-In Status** report on a regular basis (like setting a weekly reminder on your phone). If your clients are in the Pending section, it means that they are not receiving your subscription emails.
- 2) The subscription is an auto email or drip system. It is reactive and relies on new listings or changes to a listing to trigger it. The portal is proactive, meaning your client can log into the portal whenever they want. They don't need to wait for an email as a reminder to check out listings. HOWEVER, not everyone needs the portal. It has great functionality, but a subscription is often sufficient for your client's needs.
- 3) You can always check **My Sent E-mails** to see if your clients are viewing your emails and to see which listings were sent.
- 4) If you edit a search to change the parameters (like 3 bedrooms to 4), just click on Save and not Save Search and Add Subscription if you ALREADY have a subscription. Otherwise, it creates a duplicate subscription.
- 5) If you pull up the menu item for **Subscriptions**, it is an easy way to see if you are sending duplicate subscriptions for one search. Just sort by subscription name.
- 6) Preview mode allows you to preview listings in a subscription before they get sent to a client which can be helpful, but don't forget that you must do something with them.
- 7) Setting up a subscription DOES NOT email the original results when you save a search. It only emails future listings. You must manually email the results, or they will be visible in the portal if the client goes into that specific search.
- 8) **Portal Preferences** allows you to customize how you use the portal, but you don't need to. It already has some good settings.