

Concierge Mode

When creating a new auto-email, you will also have the option of running it in concierge mode.

The differences between a regular auto-email and a concierge-mode auto-email:

- A regular auto-email will automatically update and email your contact based on your scheduler settings.
- A Concierge auto-email will first notify you of the updates (email optional) and then allow you to determine which listings to approve and reject for your client.

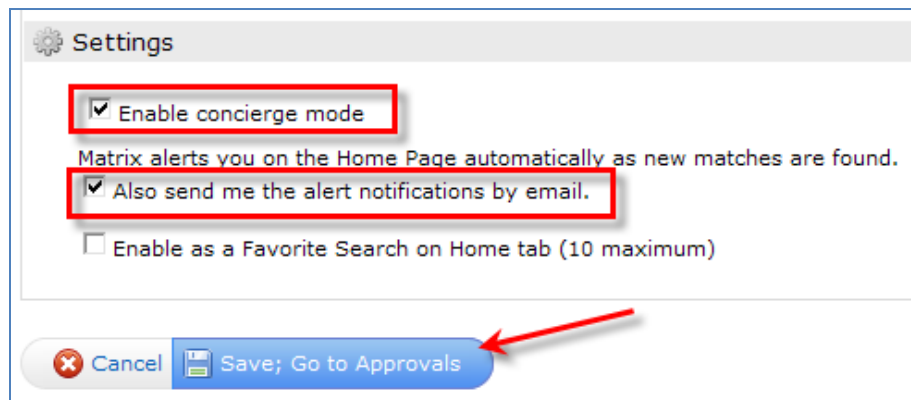
NOTE: Your clients will not notice any difference in the RCO3® Portal between Auto Email and Concierge modes.

Turning on Concierge Mode

Under the Settings section in the auto email setup, simply click the “Enable concierge mode” checkbox.

NOTE: Selecting Concierge mode will automatically turn off/disable the Schedule settings. Updates to your client are now reliant on approvals from you. You also have the option of determining how you want to be notified about future updates to this auto-email. By default, you will always receive new notifications each time you log in to RCO3® (from the home page). Click the ‘Also send me the alert notifications by email’ checkbox to be notified of new listing updates via email.

(This is strongly recommended if you won't be checking direct RCO3® notifications as often – you need to login to see these)



1. To initialize this auto-email in concierge, simply click “**Save; Go to Approvals**”.
2. You will be taken to the Approvals page for the first time. This will display (in client mode) all prior listings you included when you first setup this auto-email.

You have the option to uncheck all listings and select which listings you still want to include in the concierge auto-email.

- If you are still satisfied, make sure all listings are selected and press the **“Approve and Send...”** button at the bottom. You can omit any listings by ensuring they are not selected before pressing the **Approve** button.

Concierge Approvals Page: Laird Hamilton (29)

These 29 listings found by 'testing concierge' need your approval. They are not yet visible.

Previous	Next	1-10 of 29	Checked 5	All	None	Page	Display: Single Line		at 10	per page		
MLS#	Stat	Ty	Address	City	County	Area	Price	DOM	Bds	Bths	Ttl Sqft	
<input checked="" type="checkbox"/>	212053730	ACTV	RS	123 Mason Court	Royal Oak	Oakland	02251	\$499,900	N/155/155	3	2.1	2,500
<input checked="" type="checkbox"/>	212042292	ACTV	RS	602 S Vermont Avenue	Royal Oak	Oakland	02251	\$320,000	N/183/183	3	2.1	2,061
<input checked="" type="checkbox"/>	212053154	ACTV	RS	112 13 Mile	Royal Oak	Oakland	02251	\$384,999	N/156/156	4	3.1	2,638
<input checked="" type="checkbox"/>	211105845	ACTV	RS	1123 Etowah Avenue	Royal Oak	Oakland	02251	\$399,900	N/386/386	4	2.1	2,700
<input checked="" type="checkbox"/>	212102411	ACTV	RS	1222 Longfellow Avenue	Royal Oak	Oakland	02251	\$350,000	N/22/22	3	2.1	1,986
<input checked="" type="checkbox"/>	212079889	ACTV	RS	1802 Taylor	Royal Oak	Oakland	02251	\$399,000	N/164/243	4	2.1	2,400
<input checked="" type="checkbox"/>	212102705	ACTV	RS	737 Gardenia Avenue	Royal Oak	Oakland	02251	\$349,999	N/25/25	3	2.1	2,100
<input checked="" type="checkbox"/>	212103137	ACTV	RS	1571 Ruffner Avenue	Birmingham	Oakland	02192	\$449,900	Y/85/176	3	2.1	2,100
<input checked="" type="checkbox"/>	212020313	ACTV	RS	1376 Bennaville Avenue	Birmingham	Oakland	02192	\$459,900	N/109/109	4	2.1	2,727
<input checked="" type="checkbox"/>	212028926	ACTV	RS	3230 Garden Avenue	Royal Oak	Oakland	02251	\$365,000	N/87/87	3	2.1	2,039

Actions: Done Reject Approve Selected

[1] 2 3 • Previous • Next • Top

Continue Watching Concierge for Newly Matched Listings

The concierge will become activated once the client has successfully received your email. You will also see a yellow alert on your Realcomp Online® 3 home page:



Click the link to open the Concierge.

Once your contact has successfully received the first auto-email, you can then optionally type a message to them in the future about each set of listings that you send from the concierge.

At the bottom of the page, you can also change the display mode to see other displays aside from Single Line.

Check the desired listings to email your contact; then click the **Approve and Send Selected** button. You can alternatively click the **Reject** button to permanently omit desired listings from this auto-email in the future.

**Bear in mind that these rejected listings will not ever be included in this particular concierge afterwards.*

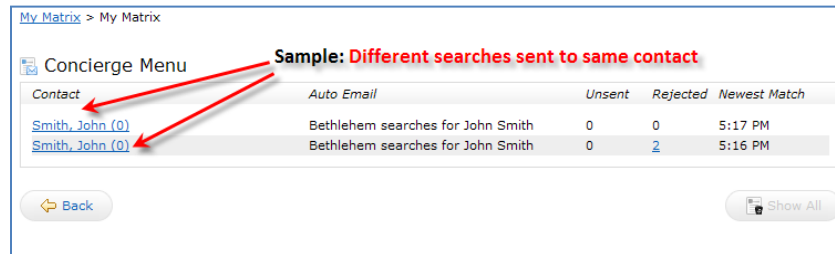
A temporary alert on the home page should display afterwards.

Email sent to John Smith.

Managing Your Concierge

1. Click on the My RCO Tab
2. Click on “Concierge”
3. You will see each concierge you have currently setup:
 - Contact: Name of contact
 - Auto Email: Name of auto-email
 - Unsent: Number of unsent listings
 - Rejected: Number of rejected listings
 - Newest Match: Time of latest matches
4. Click on the desired Contact Name
5. This will display any and all as-of-yet unapproved or rejected listings

NOTE: You can send multiple different searches to the same contact. They will all be linked together to the same contact.



Contact	Auto Email	Unsent	Rejected	Newest Match
Smith, John (0)	Bethlehem searches for John Smith	0	0	5:17 PM
Smith, John (0)	Bethlehem searches for John Smith	0	2	5:16 PM

Why am I not receiving any updates in the Concierge?

In order to set up the portal, you must approve and publish at least one listing in the concierge. If you reject all of the matched listings, then you will not receive any updates for them. Instead of rejecting them, approve them and then your client can move them to the “discard” tab of the portal.

Look at the status on the far right of the auto-email under the My RCO, Contacts page.

- **Green** is complete, meaning that Realcomp *Online*® 3 is searching for listings and will add them to your concierge.
- **Yellow** means that the set up is not complete- either you emailed the listings directly to your client rather than waiting for the concierge, or you rejected all of the listings.
- **Red** means one to two possible issues have occurred:

1. Your client has “opted out” of receiving emails from you.

Your auto email search has gone over the maximum number of listings allowed. Please revise your search criteria and add additional criteria to limit your results. You can create more than one auto email search per client if necessary.