Prospects

Managing Prospects

With Prospect Match, you store your prospective buyer's home requirements, allowing TorontoMLS to automatically track new listings and listings with status changes that match your prospect's search criteria. Prospect Match is salesperson-specific. Only you have access to your prospects.

You create a prospect profile, entering search criteria using Quick Search or Flex Search. You can have TorontoMLS perform a search to determine all current matching listings for the prospect. After the initial search, TMLS makes daily checks for new listings and listings with status changes that match your prospect's needs.

TMLS limits the number of prospects you can create.

If you know a prospect is unable to check email for a while (e.g., vacation or hospitalization), you can suspend the prospect. Use Edit Prospect to suspend the prospect and later to resume the prospect.

NOTE: To determine which prospects will expire in the near future, view the Expiration Date column at the Review Prospects page.

New Matches

When TMLS finds new matches, the following things occur:

- You receive a list, by email, with a link containing each listing's full broker report (unless you de-selected the email option). NOTE: Taking a link from this message, entitled "Today's Prospects", *requires TMLS log on*.
- At Info Centre, an alert to New Prospect Matches displays, with a link to a list of matches. (See New Prospect Matches.)
- The list is sent via email to the prospect, if you selected this option, with a link to the listings (in your choice of client report formats). NOTE: If, at "Email Others", you include your own email address, you receive a copy of any prospect match messages delivered to your client. Because this message, entitled "Prospect Matches", is intended for clients, links can be viewed *without TMLS log on*.

Prospects are Linked to Contacts

When you create a prospect profile for an existing Contact, you can access that Contact in order to pre-fill part of the Prospect record. Conversely, TMLS adds a "Prospects Stored" link in the Notes/Requirements section in that client's Contacts record (available via a Contacts Search or from details of a Contact Activity at My Calendar).

Using Prospect Match

To Add a New Prospect

1. Select the **Contacts** tab at the top of any TMLS page. Then click **Add Prospect**.
2. You can choose to add client information from Contacts, or enter new text directly. To use information from Contacts: select the **For Existing Contact** button ⃝. Then, select the contact from the drop-down list.

   To add *new* client information: select the **For Client** button ⃝. Then, enter the client name in the text box: enter last name, followed by a comma, then first name.

3. At Enter a unique Prospect Name, enter the prospect's name. The prospect name can contain alphabetic and numeric characters, as well as spaces. No punctuation, dashes, underscores or other characters are permitted. Each prospect requires a unique name. The prospect name is referenced in email to the client.

4. Click to check the recipients to whom you wish to send email notification of prospect matches (you must specify at least one choice):

   At **Email Me**, TMLS automatically selects you to receive email. If you do not want to receive email alerts, clear this check box. Note: if you entered a preferred email address at Customize My TMLS, prospect matches are sent to your preferred address.

   At **Email Client**, select the check box if you want to send email to the client. TMLS pre-fills the email address if one is specified in Contacts. If you are adding new client information or an email address is not in Contacts, enter it in the box provided.

   At **Email Other(s)**, select the check box if you want to send email to others. TMLS pre-fills the secondary email address for the client if one is specified in Contacts. You can also enter other address(es) in the box provided. For multiple addresses, separate each with a comma and do not include spaces.

5. Check the box to **Include** a second Salesperson from your office along with your name in the Prospect email. Select the Salesperson name from the drop-down list.

6. At **Enter an Expiration Date**, enter an expiration date, maximum 90 days, or accept the default; then click **Continue**.

7. At the opening Search page, select a **Search Type** and **Class** (if using Flex Search you can select more than one class). Click **Continue.**

8. Select an **Area**, one or more **Municipalities**, and optionally one or more **Communities**, if available. NOTE: The system combines Communities for two Municipalities.

9. Enter remaining criteria or use a saved search. (See Quick Searches or Flex Searches.)

10. After entering and verifying your search criteria, click **Save Prospect** to save the prospect.

11. At the confirmation prompt, click **OK** if you want to search for matching listings at this time. If you do not want to search, click **Cancel** (your prospect is still saved).

To Edit a Prospect

1. Select the **Contacts** tab at the top of any TMLS page. Then click **Edit or Delete Prospect**.

2. At **Prospect to Edit/Delete**, select the prospect from the list displayed.

3. Click **Continue**. TMLS displays the prospect profile.

4. At the Edit Prospect page, make revisions as required.

5. If you *do not* want to make changes to the search criteria, click **Save Prospect** and skip steps 6-8 below.

   If you *do* want to make revisions to the search criteria, click **Continue**, and complete steps 6-8 below.

6. To edit search criteria see Quick Searches or Flex Searches.

7. Click **Save Prospect**.

8. At the confirmation prompt, click **OK** to search for matching listings now. If you do not want to search, click **Cancel** (your prospect is still saved).

NOTES:

- Click Cancel at any Prospect edit page to cancel your changes.
- You may extend expired prospects within 10 days of expiration.
- If you search listings you can email any or all the listing reports to your client directly from the search results list (see Emailing Listings). TMLS pre-fills the email form using the information from Prospect. You can also print the search results list, view listings, and more. (See About the Search Results List.)

To Suspend (Resume) a Prospect

1. To suspend a prospect: Select the **Contacts** tab at the top of any TMLS page. Then click **Edit or Delete Prospect**.
2. At **Prospect to Edit/Delete**, select the prospect you want to suspend.
3. Click **Continue**. TMLS displays the prospect profile.
4. At **Check to Suspend Prospect**, select the check box.
5. Click **Save Prospect**.

Note: to resume the prospect, repeat instructions above, clearing the check box.

To Extend a Prospect

NOTE: Prospects expire at the expiration date (no more than 90 days) you assign. If you don't extend the Prospect Match within ten days of expiration, the system deletes the Prospect record.

1. Select the **Contacts** tab at the top of any TMLS page. Then click **Edit or Delete Prospect**.
2. At **Prospect to Edit/Delete**, select the prospect from the list displayed.
3. Click **Continue**. TMLS displays the prospect profile.
4. At the Edit Prospect page, at **Enter an Expiration Date**, enter a new expiration date.
5. Make additional changes, if required.
6. If you *do not* want to make changes to the search criteria, click **Save Prospect** and skip steps 7-9 below.

   If you *do* want to make revisions to the search criteria, click **Continue**, and complete steps 7-9 below.
7. To edit search criteria see Quick Searches or Flex Searches.
8. Click **Save Prospect**.
9. At the confirmation prompt, click **OK** to search for matching listings now. If you do not want to search, click **Cancel** (your prospect is still saved).

To Delete a Prospect

1. Select the **Contacts** tab at the top of any TMLS page. Then click **Edit or Delete Prospect**.
2. At **Prospect to Edit/Delete** select the name of the prospect you want to delete.
3. Click **Continue**.

4. At the Edit Prospect page, click **Delete Prospect**.
5. At the confirmation prompt, click **OK** to confirm the deletion, or **Cancel** to return to the Edit Prospect page.

Reviewing and Searching Prospects

To determine which prospects will expire in the near future, view the Expiration Date column at the Review Prospects page. To sort the list, click on the Expiration Date column heading. To sort in the reverse order, click on the heading again.

To Review and Print Prospect Profiles

1. Select the **Contacts** tab at the top of any TMLS page. Then click **Review Prospects.**
2. At **Prospects to Review** select one or more prospect names, then click **Continue**. TMLS displays a prospect profile for each selection.
3. To print this information, click **Print View**. TMLS displays the prospect information in a printable format in a secondary browser window.
4. Choose **Print** from the browser's **File** menu.
5. Specify the printer options.
6. Click **Print**.
7. Close ☒ the secondary browser window to return to the Prospects Review page.
8. Click **Cancel** to return to the Contacts/Prospect Match menu.

To Search Listings for a Prospect

NOTE: You can at any time search for all listings matching a Prospect profile.

1. Select the **Contacts** tab at the top of any TMLS page. Then click **Search Listings for Prospect**.
2. At **Prospect to Search**, choose a prospect from the list displayed. Then click **Continue**. TMLS displays the prospect profile.
3. At Search Result Format, select a search result format from the drop-down list, or use the default report format.
4. Click **Search Now** to search the listings or **Cancel** to return to the Contacts/Prospect Match menu.
5. Optionally, email any or all the listing reports to your client directly from the search results list (see Emailing Listings). NOTE: At **Select a Report Format**, choose **Property Match**.

   TMLS pre-fills the email form using information from the Prospect Profile. You can also print the search results list, view listings, and more. (See About the Search Results List.)

Viewing & Reporting Matches

When TorontoMLS finds matches for any of your prospects, the system communicates this information to you in a variety of formats:

- TMLS sends you daily email identifying prospects and corresponding matches (unless you de-select this option).
- TMLS displays a notice at your Info Centre page, with a link to a prospect match report.
- You can run a Daily Matches Summary Report (see below).
- You can run Daily Matches w/Report and Email Options (see below).

Prospect Match Reporting

The system looks for prospect matches every night at midnight; at that time it reports all new listings and listings for which a status change was run in the past twenty-four hours. When using the Daily Matches w/Report and Email Options, your matches are displayed in a list identical in function to the Search Results List that displays after any other TMLS search. (See About the Listings Search Results List.)

To Run a Daily Matches Summary Report

1. Select the **Contacts** tab at the top of any TMLS page. Then click **Daily Matches Summary Report**.
2. You can choose to review all prospects or select one or more from your list of prospects. To review all, click **Check to Review All My Prospects for Matches**.

   For reviewing particular prospects, click **Check to Select Prospect(s) from below to Review Matches**. At the list of prospects, click on the prospect name (CTRL+Click to select multiple names).
3. At **Days Back** choose the timeframe you want the report to cover. You can go back to 14 days.

   NOTE: The choice, Today, includes all matches determined when the Prospect Match program last ran (approximately midnight the night before). It does not include matches for listings changed or added today.
4. Click **Continue**. TMLS displays a list of matches for each prospect.
5. To view a broker full report for any listing, click on its **MLS#**.

NOTE: To see the selected listings in another report format, choose one from the drop-down list at the top of the report. Repeat as needed.

To Print a Daily Matches Summary Report

1. Click **Print View**. TMLS displays the report in a printable format in a secondary browser window.
2. Choose **Print** from the browser's **File** menu.
3. Specify the printer options.
4. Click **Print**.
5. Close ⊠ the secondary browser window to return to the summary report.

To Run Daily Matches w/Report and Email Options

1. Select the **Contacts** tab at the top of any TMLS page. Then click **Daily Matches w/Report & Email Options**.

2. At **Prospect to Review Matches**, select a prospect from the drop-down list.

3. At **Days Back** choose the timeframe you want the report to cover. You can go back to 14 days.

   NOTE: The choice, Today, includes all matches determined when the Prospect Match program was run (approximately midnight the night before). It does not include matches which become available today.

4. At **Search Result Format**,choose a custom search results format for your summary, or use the default.

5. Click **Continue**. TMLS displays your prospect match report in a format similar to the search results list.

   NOTE: Refer to About the Listings Search Results List and associated topics for information regarding printing, sorting, and emailing the prospect match results.

Tip: You can print documents without extraneous reference information at the top (header) and the bottom (footer) of each page. (See Special Printing Format.)