



Messaging Setup

The messaging centre has been configured to accommodate devices that receive messages in either an email to text format or an html email format.

Provider Setup

The first step is to set up the various providers used by your agents. This will allow you to set up different delivery methods (email or text) for each provider, thereby accommodating the various devices used by the agents. If a provider changes their email extension, this will allow you to make the change in one place. It will then automatically change for each agent that uses that provider.

1. Under the Messaging Icon go to Setup → Message Providers
2. Click the Add Entry button
3. Enter the Name of the Provider (You will want to make sure that the name is descriptive)
4. Enter the extension for the providers email addresses (everything that comes after the “@” symbol)
5. Enter the maximum number of characters the provider allows in a message
6. Select the delivery method:
 - Split: If the message is longer than the maximum allowed characters, the message will stop at the maximum and then send the remainder in a second message.
 - Cut Off – The message will cut off at the maximum allowable characters. Any remaining portion of the message will not be sent.



HINT: Notice that in the example below, the Split or Cut Off option has also been added as part of the provider name. This way you can have a split or cut off for each provider and makes the correct option easily identifiable when setting up the email preferences per agent.

Message Provider - Edit - Rogers Blackberry Cut Off

List Details

Fill in the fields below.

Provider Name: Rogers Blackberry Cut Off

Address Extension: rogers.blackberry.net

Max Char: 160 Split Cut Off

Save Cancel Delete

Agent Message Setup

The next step is to setup the messaging options for each agent.

1. Under the Admin Icon, go to Agent/Staff.
2. Select the agent from the list. Use the search filter if necessary to find specific agents.
3. Select the Message tab.

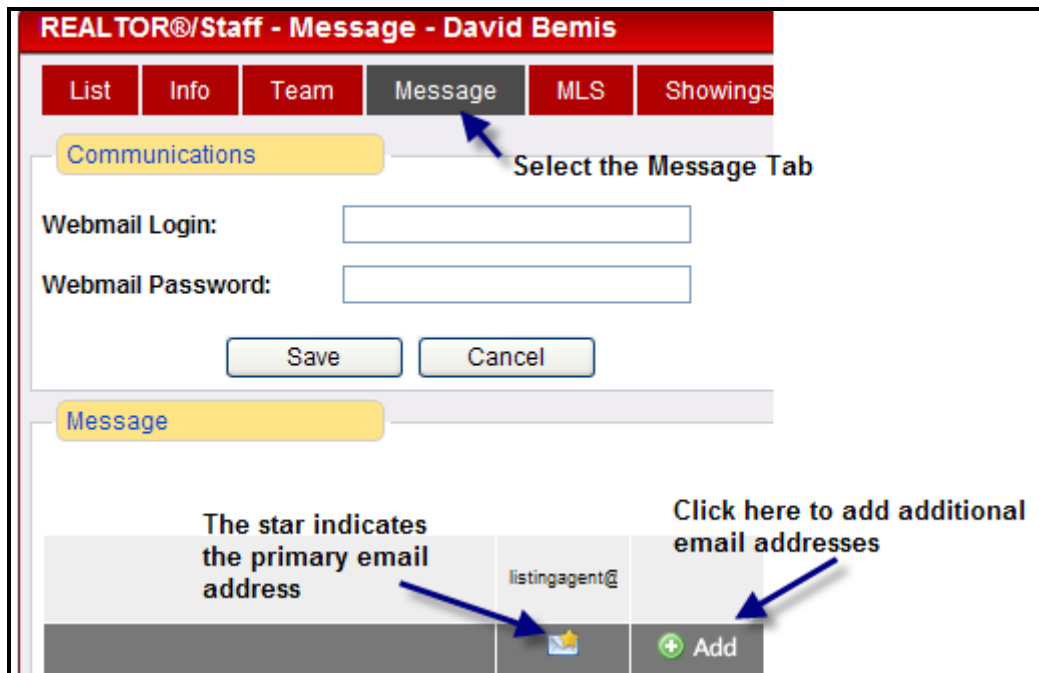
For RMS Integrated clients, the email address entered in RMS for this agent will be integrated into this screen. Non RMS clients will have to add all email addresses. You will notice that there is star on this email indicating that this is the primary email address for this agent.

Messaging Setup



IMPORTANT: You have the option of making any email address that you enter in the system the primary email address however, this address must be an email address and not a text address. The agent primary email address is the agents “from” address for notifications that come from the agent. It is also the email address at which the agent would receive their password notification and event confirmations.

4. To add an email addresses click the  icon.



REALTOR®/Staff - Message - David Bemis

List Info Team **Message** MLS Showings

Communications **Select the Message Tab**

Webmail Login:



Webmail Password:

Save Cancel

Message

The star indicates the primary email address

Click here to add additional email addresses

listingagent@  

5. When adding a new address, the first option is: Is this address an email address (device is capable of receiving html email) or is it a text address (device receives email and displays it as plain text). The screen options for each will be slightly different.

Email Option:

- Select the email option and enter the full email address.
- If you would like this new address to be the agent primary email address, click the Primary check box.
- Save the entry.



Message - Add New Address

Type: Email Text

Address:

Primary:

Save Cancel



Messaging Setup

Text Option

- Select the Text option and enter the phone number or email address of the text device. You do not need to put in the full extension. Once the provider is chosen the system will marry up the address with the provider extension entered as per the Provider Setup section of this document.
- Select the provider from the drop down list.
- Save the entry.

Notification Selection

Once all of the email addresses for the agent have been entered, you can now select which addresses will receive which notifications. The various notifications are listed at the left of the screen. Below each email address you will see a series of indicators where if:



Red = No notification will be sent to the email address for this column



Green = Notification will be sent to the email address for this column


Click on the indicator to toggle it on or off or click the Toggle all to set the same settings for all notifications for the email address governing that column.



Messaging Setup

Notification Forwarding

The forwarding option will allow the agent to forward notifications to another email address in their absence.

1. Check the Forward check box at the right side of the screen and click .
2. Select either:
 - From the list of agents/staff
 - Select the type of device (email or text).
 - Type the name of the agent/staff member and select the appropriate address from the list. Please note that the list will only show email address that match the type you have selected. (i.e HTML or Text).
 - Enter the date and time to begin and end the forwarding (optional)
 - If you would like this forwarded email address to receive all the notifications you are currently receiving (i.e. green selector indicates send message), check off “Mirror all currently selected notifications”.
 - If you are not mirroring your selections, toggle on the messages to be sent to this email address.
 - Or
 - Add a different address
 - Select the type of device (email or text). Note: If text is selected you will be prompted to select a provider.
 - Enter the address
 - Enter the date and time to begin and end the forwarding
 - If you would like this forwarded email address to receive all the notifications you are currently receiving (i.e. green selector indicates send message), check off “Mirror all currently selected notifications”.
 - If you are not mirroring your selections, toggle on the messages to be sent to this email address.



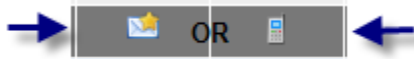
Hint: You can use forwarding to copy certain notifications to members on a team. Just leave the “from” and “to” dates blank and you will create an open ended forwarding command.

Messaging Setup

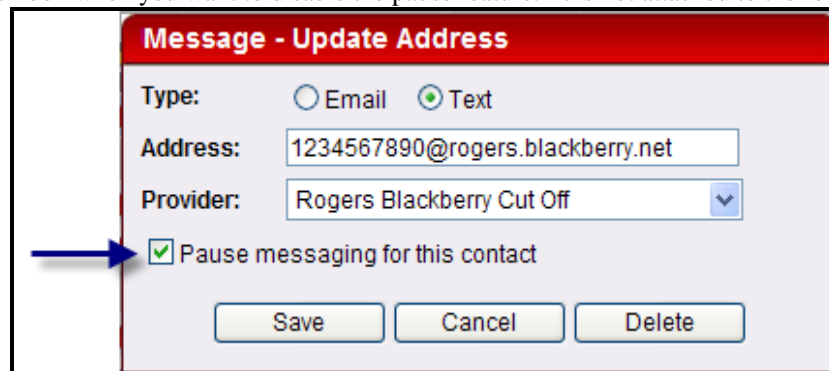
Pausing Messaging for an email address

There may be times when an agent would like to pause their messaging for specific email addresses. An example of this would be when an agent is out of the country and does not want to incur roaming charges by receiving notifications. To pause the notifications for a specific email address:

1. On the message tab, click the icon under the email address to be paused.



2. Click the Pause Messaging for this contact box and click Save. REMEMBER – You will have to remove the check box when you want to disable the pause feature. It is not attached to the forwarding to and from dates.

A screenshot of a dialog box titled 'Message - Update Address'. The dialog has a red header bar. Below the header, there are two radio buttons for 'Type': 'Email' (unselected) and 'Text' (selected). Below that is a text input field for 'Address' containing '1234567890@rogers.blackberry.net'. Below that is a dropdown menu for 'Provider' showing 'Rogers Blackberry Cut Off'. At the bottom, there is a checked checkbox labeled 'Pause messaging for this contact'. Below the checkbox are three buttons: 'Save', 'Cancel', and 'Delete'. A blue arrow points to the checkbox.

Remember: For any changes made to this page you must hit the Save button at the bottom of this section.