

## How to send matched properties

1. Sending matched properties can be configured in the 'Settings' of the platform.

The screenshot displays the 'Opportunities' management interface. At the top, there are navigation tabs: Opportunities, Properties, Contacts, Tasks (1), Leads (5), Holiday homes, Marketing, and Manage Web. Below the tabs is a search bar for finding opportunities, with options for '( Reference, Potential client, Observations, Extra fields )' or 'advanced search ...'. A summary line indicates '1 Opportunities, tags a, all opportunities.' and a 'Show' dropdown menu is set to 'All opportunities'. Action buttons include 'Select', 'Add a tag', 'Email', 'Print', 'Delete', and 'More'. The main content area shows a listing for 'Listing, ANG\_9' by Sofia Custodio, dated 08 Mar. It includes contact information for Julie Bush (Owner), a phone number, and an email address. A small image of an apartment is shown, along with details for 'Apartment 2 Rooms, APA\_08' in Trafford, Greater Manchester, North, which is available for sale for £400,000. Tags include 'A' and 'Opportunity Won'. At the bottom, there are report options: 'Create report' and 'Summary of opportunities'. The footer contains the eGO Real Estate logo, a circled 'Settings' link, and other navigation links: Users, Groups, Support, FAQ, Updates, and a row of flags. It also states 'eGO is a service by Janela Digital' and provides links for 'Privacy policy' and 'Terms of service'.

2. This feature enables alert emails to be sent whenever a customers' preferences, saved in an opportunity, match a property's features and/or details.

The screenshot shows a settings page with a sidebar menu on the left containing: Newsletter management, Email management, Functionalities, Critical Actions, Distribution of internet leads, and Sending matched properties (highlighted with a green circle). The main content area is titled 'Sending matched properties' and contains three sections of radio button options:

- When inserting property**
  - Do not send email
  - Send email to all potential clients
  - Send email to new potential clients
- When changing the availability of the property**
  - Do not send email
  - Send email to all potential clients
  - Send email to new potential clients
- When changing the price of the property**
  - Do not send email
  - Send email to all potential clients
  - Send email to new potential clients

Below the options is a 'Message' field with a language dropdown set to 'English (United Kingdom)'. The message text reads: 'Hello, I am sending this email with properties that might be of your interest. If you have any doubts or questions, please do not hesitate in contacting us.' At the bottom right are 'Save' and 'Cancel' buttons. The footer includes the EGO Real Estate logo and navigation links: Settings | Users | Groups | Support | FAQ | Updates | [Flags] EGO is a service by Janela Digital. Privacy policy | Terms of service

3. These emails can be automatically sent in 3 different scenarios:

- **when a property is added**

This option should only be selected when all basic information is completed on a property form (including photo) before saving it for the first time. Otherwise customer's will receive incomplete information regarding a property.
- **when a property's availability changes**

When a property is rented/sold or available again, you can inform your potential customers that a property's availability has changed.
- **when a property's price changes**

When a property has a price reduction or price increase, you can inform your potential customers that a property's price has changed.

In each one of these scenarios there are 3 options available:

- **Do not send email**

The alert email is disabled

- **Send email to all potential clients**

Send an email to each customer with an active business opportunity, who's preferences match the property's features (even if the property is already associated or rejected)

- **Send email to new potential clients**

Emails will only be sent to those customers who:

- do not have the property associated or rejected
- the property's features match their preferences
- have an active business opportunity

This email will only be sent once per customer.

The default text sent with the property details can be set by the application manager.

The email will be sent in the same language as the program's interface.

**4.** If you would like to send the email in a different language, then you should manually send it from the customer's opportunity form.

**5.** These automatic emails are sent every 30 minutes. If you would like to block a specific hour in order to only send emails at the same time everyday, then send a request in writing to our support team.

6. These emails will only be sent if the 'Email management' fields are completed correctly.

▼ Email management

Email domain

SmtP Server  Port:  Authentication:

Admin login

Password

▶ Functionalities

▶ Critical Actions ⓘ

▶ Distribution of internet leads

▼ Sending matched properties

When inserting property

Do not send email

Send email to all potential clients

Send email to new potential clients

When changing the availability of the property

Do not send email

Send email to all potential clients

Send email to new potential clients

When changing the price of the property

Do not send email

Send email to all potential clients

Send email to new potential clients

Message English (United Kingdom) 🇬🇧

Hello,  
I am sending this email with properties that might be of your interest.  
If you have any doubts or questions, please do not hesitate in contacting us.

To avoid possible mail server blockages, emails are sent only one per customer in each dispatch made.

Each email sent from the platform is automatically registered in the following forms:

- potential customer
- property
- opportunity

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**Learn more at:** <http://academy.egorealestate.com>

**Questions:** [support@egorealestate.com](mailto:support@egorealestate.com)