SPIN USER GUIDE version 13—SMARTS EXCERPTS
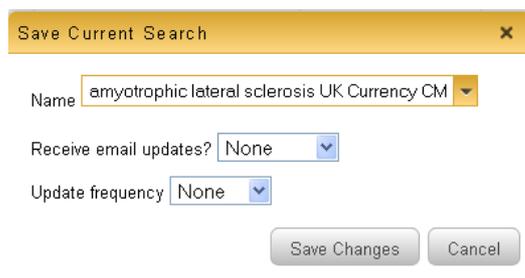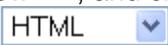
5.2.4　Activating SMARTS Email Notifications

For each saved search, users can choose whether or not they want to receive SMARTS email notifications. SMARTS sends returned opportunities from saved search criteria to users' inboxes on a daily or weekly basis.

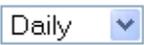> ❖ See also Section 5.6.2—SMARTS Email Notifications

Activating SMARTS is a process that *requires users to make two choices* within the **Save Current Search Popup**. From this popup:

- Click on the down arrow , and choose either HTML or Plain Text from the menu.

If you choose HTML, your SMARTS notifications might contain enabled hyperlinks. If you choose Plain Text, your SMARTS notifications will contain only text.

Next, choose how often you want to receive email notifications:

- Click on the down arrow and choose either Daily or Weekly from the "Update frequency" pull-down menu.

 In order to receive SMARTS email notifications, you must select options from BOTH pull-down menus within the Save Current Search Popup.

If do not choose to activate SMARTS now, you can do so later when accessing your saved search

> ❖ See Section 5.6.1—Saved Searches
> ❖ See Section 5.6.2—SMARTS Email Notifications

- Click to close the popup. Your SMARTS preferences for this saved search will be retained; *OR*

- Click to close the popup window. Any changes you made within the window will not be saved.

5.6.2   SMARTS Email Notifications

SMARTS is an email notification feature that sends new or updated opportunity results from users' saved searches directly to their email inboxes.

Users may choose to receive notifications on a daily or weekly basis. SMARTS can be activated in one of the ways described below.

- The first time search criteria are saved.
    - ❖ See Section 5.2.4—Activating SMARTS Email Notifications

- At any time from **Searches > Saved Searches**—Available Saved Searches. Use the **Automated** and **Email Format Columns** to do so.
    - ❖ See Section 5.6.1—Saved Searches