

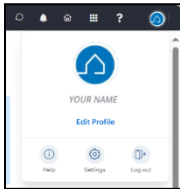
Tips for Success

How to import Saved searches and Prospect searches from Stratus

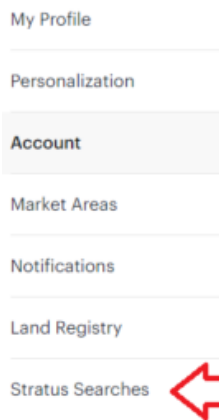
You can import your saved searches and prospect searches from Stratus into REALM™.

Here are the steps to do so REALM™:

1. Click on your profile avatar and choose **Settings**.



2. Choose **Stratus Searches** from the left-hand menu.



3. Choose the **Saved and/or Prospect searches** from Stratus to be imported into REALM™. by clicking the checkbox associated with the search name.
 - a. **For your Prospect searches:** Use the "Import Selected" feature. Click the checkbox beside the header "SEARCH NAME" to import all searches.

<input type="checkbox"/>	SEARCH NAME	SEARCH TYPE	SHARED BY	MODIFIED	IMPORTED	IMPORT-ACTION
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To import some (but not all) searches, click the checkbox beside each of the searches to be imported.

It is important to note: The Import Selected feature will save all searches to your contact card and not to client contact cards.

- When Import Selected is used, REALM™. will save all searches under your contact card using all the notification settings set in Stratus. This means that when the search is imported, it will be saved under your name with the email addresses for your client contact(s) included in the Email Address(es) field.

- b. For individually saved searches:** If you have searches saved in Stratus for individual client(s), it is recommended that you choose to import as a single search by clicking the checkbox beside the individual search name.

A Save Search window will open to allow you to set the contact associated with the search along with your notification preferences and other search settings.

4. Click the **Import button or Import Selected**

It is important to note that: you can re-import searches by completing the import process again.

Re-importing a search into REALM™. will override the previously imported info.

- Please Note: When a search is imported into REALM™ it will remain live in Stratus. Notifications in V3 will need to be disabled to stop notifications coming from Stratus.

If you have any questions, please contact us at Help@REALMmlp.ca.

