



MATRIX MANAGE AUTO EMAILS

Auto Emails are created by an agent for clients who want to receive automatic email notifications of listings that match their specific criteria. Follow the instructions below to manage Auto Emails.

Step 1:

To manage Auto Emails go to My Matrix tab and click the Contacts link. To view or edit all items associated with that contact; click the contact's name or the triangle (down arrow) icon to the left of the contact's name. Then click the Auto Email link to modify the Auto Email.

The screenshot shows the Matrix interface. The top navigation bar includes Home, Search, My Matrix, Finance, Roster, Stats, Realist Tax, OnDemand, Links, and Help. The user is logged in as Kathleen. The main content area displays 'Active Contacts (26)' with a search and filter options. A contact named 'Chex KitKat' is highlighted, and a red box indicates the 'Auto Emails (2)' link in the contact's menu. A second red box highlights the 'Auto Email' entry in the detailed view, showing a status of 'Active' and a subject line 'Lets see when I open and do not check w...'. The tool bar below the auto email entry includes options for Settings, Criteria, Results, Date Since, Market Update, Open in Portal, and Delete Auto Email.

After you click on Auto Email, click on the Name of the Auto Email you want to manage.

Step 2:

Selecting the Auto Email name will display a tool bar with a list of options such as Settings, Criteria, Results, Date Since, Market Update, Open in Portal and Delete Auto Email. By clicking on an option you can then update the Auto Email settings, the search criteria, disable the Auto Email or Delete the Auto Email.

What do the tool bar options mean?

Settings

Change recipient name, disable/enable Auto email, update options for Concierge, Reverse Prospecting, Enable as a Favorite Search, update schedule or change the Auto Email into a Saved Search.

Criteria

Update the criteria used to define your search.

Results

View the search results.

Date Since

View any updates to your search since you last viewed them. By clicking on this option the number of updates will appear under the criteria.

Market Update

This advanced market update section allows you to optionally choose an update type and/or update date range in combination with the criteria of the original search.

Open in Portal

View the emails/listings sent to your client. You will view the portal in a customer report format.

Delete Auto Email Delete the Auto Email in its entirety.