

Create an Auto Email in Matrix

Create an Auto Email so a Contact receives matching listings on a schedule. Classic and New Search use different setup screens - follow the section that matches the search you used.

You need a Contact first. See Add and Manage Contacts in Matrix.

Note: Auto Emails can only be created when the search has 250 listings or fewer. Refine the search if the count is over that limit.

From Classic Search

1. Complete a search in Classic Search - see Search for Listings in Matrix.
2. Select Results.
3. Select Save > New Auto Email.
4. Under Contact, select the contact, or select Create a New Contact.
5. Optional: Enter a CC. Turn on BCC me a copy of all emails and/or Also send link via SMS text message if needed.
6. Enter a Subject - this is the email subject line the contact sees.
7. On Welcome Email, review or edit the first message sent when the Auto Email is created. On Recurring Email, set the message used for later emails when new or updated listings match. Edit the Salutation or Signature if needed.
8. Confirm the Criteria summary.
9. Under Settings, choose options as needed:
 - Enable concierge mode - approve listings before the client receives them.
 - Show this contact in Reverse Prospecting in Matrix results - for this Auto Email (the contact must also have reverse prospecting enabled).
 - Enable as a Favourite Search on Home tab (10 maximum).
10. Under Schedule, choose ASAP, Daily (Sun-Sat AM/PM), or Monthly.
11. Select Save.

From New Search

1. Complete a search in New Search - see Search for Listings in Matrix.
2. Select Send > Auto Email.
3. Under Send To, search by name or email and select the contact, or select Create New Contact.
4. Enter a Subject - this is the email subject line the contact sees.

5. On Welcome Message, review or edit the first message sent when the Auto Email is created. On Recurring Message, set the message used for later emails when new or updated listings match.
6. Open Options and choose settings as needed:
 - Also send link via SMS text message
 - BCC me a copy of all emails
 - Show this contact in Reverse Prospecting in Matrix results - for this Auto Email (the contact must also have reverse prospecting enabled).
 - Add as a favorite search on Home
 - Enable concierge mode - approve listings before the client receives them.
7. Under Frequency, choose ASAP, Daily (Morning or Evening), Weekly (day under On), Monthly, or Custom (time of day plus days of the week).
8. Open Criteria to confirm the search summary.
9. Select Send.

Manage an existing Auto Email

1. To view all Auto Emails, open My Matrix > My Auto Emails.
2. To view Auto Emails for one contact, open My Matrix > Contacts, open the contact, then open the Auto Email tab.
3. Expand an Auto Email subject to view status and details. Enable, disable, edit criteria, view results, or review sent history from there.

Tips

- Classic opens Auto Email from Save; New Search opens it from Send.
- Reverse prospecting on an Auto Email applies only to that search; the contact must also have reverse prospecting enabled. See Reverse Prospecting in Matrix.
- If volume is high, tighten criteria or use concierge mode.

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