

Portal Notifications and Timeline Settings in Matrix

Control how Matrix notifies you when contacts use the client portal (OneHome), and use Timeline for daily client activity.

Note: Text (SMS) notifications that relied on email-to-text are no longer supported. Canadian telecom services no longer support email-to-text delivery, so cellular phone and provider fields in portal notification settings are being removed. Use email notifications and Timeline instead.

Configure portal notifications

1. Open the Utility Menu (look for [Hello, Your Name] at the top right). Select Settings, then select Portal Notification Settings.
2. For each contact action (for example Visits Portal, Saves a Favourite, Dislikes a Listing, Adds Notes, Saves a Search, Email Unsubscribe), choose how you want to be notified:
 - Notify me ASAP via Email
 - Notify me via Daily Summary Email
 - Display on Timeline
3. Ignore Notify me ASAP via Text and any Text Notification Settings (mobile number / cellular provider). Those options no longer work and will be removed.
4. Select Save.

Use Timeline

1. On New Home, open the Timeline (client activity) area when shown.
2. Review portal events such as favourites, discards, notes, and visits for the actions you left on Display on Timeline.
3. Follow up with the contact from Matrix as needed (email tools or Auto Email criteria).

Tips

- Use ASAP email for hot buyers; use daily summary email when volume is high.
- Watch for email unsubscribe and related events before rebuilding Auto Emails - see Create an Auto Email in Matrix.

Source: <https://support.itsosystems.ca/kb/113>