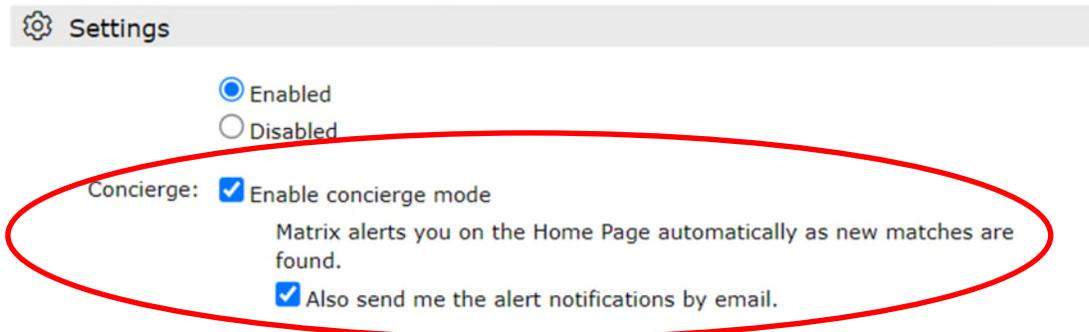


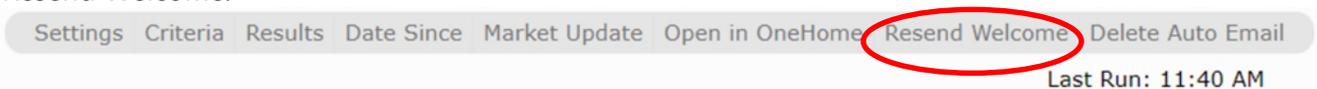
About AUTO-EMAILS

- When saving a search, you will have an option to set up an **Auto Email**. Once set, you will find your Auto Emails under **My Matrix, Auto Emails**. **Any email from Matrix will send the recipient a link to a OneHome portal webpage branded to you**. Texting is an option in addition to emailing matching listings. To set up your existing clients for texting, in Matrix, click on **My Matrix** and then **Contacts**. Open each contact you wish to invite to opt in and click on **Send Opt-in Request**. Wait for the contact to be updated (you will need to check back in your contacts to see if the green checkmark appears, and then you may edit the auto-email to include texting).
- If you choose **Daily** as the option for sending an auto-email, there is an AM and PM option.
 - The AM emails are sent at 11:00am.
 - The PM emails are sent at 6:00pm.
- A maximum of 800 listings are allowed with a search associated with an Auto-Email. If the search returns over 800 listings, you will be prompted to edit the Saved Search.
- A **maximum of 8 email recipients** may be selected per email.
- **Concierge Mode** is available to allow you to set the client up for an auto-email but allow you to decide before a matching listing goes out if it should go to the client or be rejected. You can see these in Matrix on the home page as new matches are found or choose to have Matrix send you an email alert so you can approve or reject the matching listing,



After clicking **Save** to generate your auto-email...

- **Your client must click on the link they receive to view properties and activate recurring emails.**
- You will be sent a notification email if the client does not activate their recurring emails after 23 days. You can then contact them to click on the link to activate within the next 7 days.
- The client's auto-email will be deactivated if they fail to activate it after 30 days.
- If the auto-mail was not activated you can re-send the Welcome message in **My Matrix, Auto Emails**. Click on the arrow next to the 'Subject' name you need to resend to and then select "Resend Welcome."



- Workaround Tip- if you add a non-Matrix email for yourself as a second email for the client before resending, you may then activate the auto-emails for the client. After doing so, go back in and remove yourself in settings. Ex. Client@email.com, AgentNonMatrixEmail@email.com
- Once inactive, you may make an auto-email active in Matrix, which will restart the clock 30 days.

- If an **Auto-Email returns zero listings** for 365 days, it will be disabled by the system (you can enable again after disabled but not before). Consider changing the search parameters.
- If the client clicks on any link within 365 days (after activating within the 30 days), they will automatically get 365 more days. In other words, active clients can stay active forever if they are interacting with system.
- The **triggers for an email to be sent to a client** are:
 - A new or revised listing falls into the search scope of the Auto-Email
 - A price change occurs on a listing that is within the search scope of the Auto-Email
 - The status of a listing changes to meet your search criteria– includes Back on Market
 - **Notes:**
 - **An email is NOT sent when new pictures are added to a listing**
 - **What shows in your client's OneHome portal depends on what status(s) you chose to include in your search criteria to begin with. Ex. If you chose A and C status, then they will get updates when a listing changes to C status, and it will remain in their portal. If not, the listing will fall out when it goes to C, U, P, S, X, W or T status.**

- **Status of Your Auto-Email**

Once an Auto-email is set up, the email will be sent to your client. The status of your Auto-Email will be one of the following if you look in **My Matrix, Auto-Emails**:



Auto Email is Active, but the Contact has not yet clicked the **View Properties** link in their welcome email.



Auto Email is Active and has been accessed by the Client.



Client or agent disabled Auto Email.

A client can unsubscribe from just one email, from all email from one agent, or from all email from the MLS. If your client is not receiving an email, make sure they did not unsubscribe from your or the entire MLSs emails.

- **Clients Opting in to Receive Emails from Matrix After Opting Out**

If your client previously unsubscribed from Matrix emails and would like to opt back in, follow these steps:

- Your client must send a blank email to optin.NYS@matrixemailer.com **from the email address that was unsubscribed**. Allow time for the email to be received and processed by Matrix.
- After that, you must go to **My Matrix, Auto Emails**. Click on the name of the auto email (*under the Subject column*) or the corresponding downward-pointing arrow to open the full options, then click **Settings** and **re-enable**.
- **Click on Save.**

- **Auto-Email Issues**

- When you have "narrowed" the search:
 - When setting up a saved search/auto-email, the search becomes 'frozen' when you save it if you have narrowed the results to certain listings. Thus, using the **Refine/Narrow** feature stops auto emails from sending out future emails. In other words, they will receive the listings you narrowed down but nothing new can match the criteria because you have narrowed it down to that group of listings.
 - If the client keeps checking the link with the narrowed listings, the listings will eventually expire, go to pending or be sold but will stay in the link, because you narrowed to those listings.

- Instead, after narrowing a search for auto-email, if you wish it to keep finding and sending new matching listings, you need to approach it differently. Try the **Refine/Discard** option instead to get the listings you need and then save your search. You won't have 'narrowed' your search criteria to only discarded unwanted matching listings.
- Auto-emails are going to spam: Client should add the following email to their allowed list NYS@northeastmatrixmail.com or save as a trusted sender in their email program.
- **Client Portal Notifications for the Agent Via Text Message and or Email** - See our Tech Tip on **How to Configure Client Portal Notifications** in Matrix for more details. The basics are as follows:
 - **Step 1:** In Matrix, click on your name in the upper right, then **"Settings"**
 - **Step 2:** Click on **"Portal Notification Settings"**
 - **Step 3:** Select whichever check boxes in the list of Portal Activities you want to be notified about. Note: If you choose email notifications, the email will be sent to your agent email address in the Matrix roster.
 - **Step 4:** If you chose to be notified via text, click the link below to edit your cellular information.

Portal Activity Notification Settings

Use this page to control how and when you would like to be notified of activity performed by your contacts.

When a contact does this...	Notify me ASAP via Email	Notify me ASAP via Text	Notify me via Daily Summary Email
Visits Portal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saves a Favorite	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Removes a Favorite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discards a Listing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Un-discards a Listing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adds Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Saves a Search	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visits Portal First Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Text Notification Settings

Text notifications are sent as emails to your phone's MMS address and will display on your phone as text messages from NYS@matrixemailer.com

Mobile Phone Number:

Cellular Provider:

[Click here to edit your cellular information](#)

- **Step 5: Click "Send me a verification code"**

Text Notification Settings

Text notifications are sent as emails to your phone's MMS address and will display on your phone as text messages from NYS@matrixemailer.com

Enter your 10-digit mobile phone number and select your provider below. Shortly after clicking the "Send me a verification code" button you should receive a text from NYS@matrixemailer.com. Enter the verification code from that text in order to confirm that your settings are correct.

Mobile Phone Number:

Cellular Provider:

- **Step 6:** Enter the validation code received via text, then click **"Save my cellular information"**
- **Step 7:** Once completed, click **"Save"**