YOUR CONTACTS

Your contact records in SoftMLS have been updated in Matrix daily since Matrix was activated on November 1. If you add a new Contact or you edit an existing Contact in SoftMLS, the change will have been updated in Matrix daily.

If you make any change or update to an existing Contact in Matrix, that Contact will not be updated further. It is assumed that changes made in Matrix are changes that you want to keep so they will not be overwritten with data from SoftMLS.

To Do: Review All Contacts in Matrix

Make sure all your Contacts converted correctly. Edit your Contacts, as needed, to fill out information that may not have been available in SoftMLS.

Note – If there was no email address in SoftMLS for your contact, it was added to Matrix with your own email address. You can choose to delete these or add an actual email address.

- Click on **My Matrix, Contacts**

- Click on the **Contact name or the arrow** to the left of their name to view the details for that Contact as well as to see the editing options

- Click **Edit Contact** if you need to update a Contact – notice that required fields are highlighted in yellow

- A pick-list will appear with some fields. To see more information for this Contact, click **Show All Fields**

- Click **Save** when finished

AUTO-RESPONDERS ARE IN MATRIX AS SAVED SEARCHES UNTIL YOU CONVERT INTO AUTO EMAILS

Auto-Responders were imported into Matrix as **Saved Searches**. They will be imported from SoftMLS again on **November 29.** Therefore, if you've added new Auto-Responders to SoftMLS since they were last imported to Matrix mid-month, those new searches should be in Matrix on November 29.

All who want to continue to send listings to their clients automatically will need to both update these saved searches and then turn them into auto-emails manually. This is for several reasons, one being that our new Matrix system has many different/additional fields and also all towns and villages in NY (and 4 counties in PA). Second, if you enable the saved search before SoftMLS is turned off, your client will receive from both systems which may be confusing.

Tip: We recommend checking on and updating all the saved searches before cutover and then setting to auto email several days after cutover to allow time for everyone to edit their listings in Matrix. You could also wait and do it all after cutover but remember, we will only be able to look at CCBRMLS.com for up to a week. It may be wise to prepare some print screens of SoftMLS if you are going to wait.

Once you edit a Saved Search in Matrix that was converted from SoftMLS, that particular Saved Search will not be updated again on November 29. It is assumed that you want to keep changes that you make in Matrix and do not want those changes overwritten. The steps to turn that saved search into an auto email follows.

To find Your Auto-Responders in Matrix, go to My Matrix, Saved Searches:

All SoftMLS Auto-Responders that were imported into Matrix are marked with "(Imported)" and then the name of your Auto-Responder. Ex. '(Imported) Lake search for Mary'

- **To Do: Edit Saved Searches (any time between now and when you want to activate the auto-email, depending on how many you have to do).**

- Click on **My Matrix, Saved Searches**

- Click on the **Saved Search Name or the arrow** to the left of the Saved Search Name

- **Criteria:** You will see the criteria for the search listed below the option buttons. If you need to edit any of this...

    o Click **Criteria** to go to the Search screen if you want/need to modify that Search (note you can see how many listings will match as you go)

    o Click **Save** after you've made the changes

Tip: <u>Take a really good look at all the fields that are in SoftMLS as search defaults.</u> Even if you picked 'Any' when searching. When SoftMLS sent it over, all of the defaults were included and you may need to take some of these out to make your search work in Matrix. See sample below of Matrix on the left and the SoftMLS search screen on the right. You can see that many extra fields are showing in Matrix for this auto-responder example. Many of these will be fine for searching, however, **#Acres, Garages** and **Square Feet** should be checked for accuracy. The yellow highlighted area was actually part of the SoftMLS Auto-Responder and the other items were the parts of the search in SoftMLS marked as 'Any'. In this example, Matrix is set to look for Number of Garage Spaces =1 only (not 1+) and Square Feet of 1-1000 (search default in SoftMLS) even though the agent had not indicated a square feet limit.

To Do: Enable Auto-Emails
We advise waiting a day or two after cutover before activating these to give everyone time to get in and edit their listings with all the Matrix fields.

- Click on **My Matrix, Saved Searches**

- Click on the **Saved Search name or the arrow** to the left of the Saved Search name

- Choose the **Settings** option

  o If you would like to change the name of your search (to remove the word 'imported'), you may do so and click Save. Click on Settings again and proceed.

  o In Settings, click on the link at the <u>top left</u> of the page that says
       "**Turn this Saved Search into an Auto-Email**"

- Edit the information for the Auto-Email. Read the screen and uncheck if you do not want a copy, enter a Subject for your auto-email. Then change the welcome message, if desired.

  Note: You may want to change the Welcome Message to indicate that this is a new system and that they need to click on the link to activate or accept that you will be sending them listings. If they fail to click the link, you will be notified in 23 days so you can contact them again. Once you change the message to your liking, click on the little gear on the lower right of that message to set it as your default.
  PS- Once you have all of your Auto-Responders set, you may want to change this message again for new clients going forward.

Schedule: If you choose **Daily** as the option for sending, there is an AM and PM option. The AM emails are sent at 11:00am. The PM emails are sent at 6:00pm. ASAP is sent within about 15 minutes.

- Click **Save**

More About AUTO-EMAILS

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).

- If an Auto-Email is not opened by your client, it will be disabled after 365 days.

- The triggers for an email to be sent to a client are:
  - A new listing falls into the search scope of the Auto-Email
  - A price change occurs on a listing within the search scope of the Auto-Email
  - The status of a listing changes

  - **Note: An email is NOT sent when new pictures are added to a listing**

NOTE: A maximum of 800 records are returned with a search associated with an Auto-Email. Please make sure the Saved Searches that are enabled do not return more than 800 listings. If the search returns over 800 listings, you will be prompted to edit the Saved Search.

After clicking **Save** to generate your first auto email…
Your client must click on the link they receive to view properties and <u>activate recurring emails.</u>

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 logged in and activated their portal or that search specifically.
- ✅ Auto Email is Active and has been accessed by the Client.
- 🔴 Auto Email is disabled by client or agent.

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 emails or from the MLS emails.

Clients Opting in to Receive Emails from Matrix After Opting Out

If your client previously chose to unsubscribe 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.**