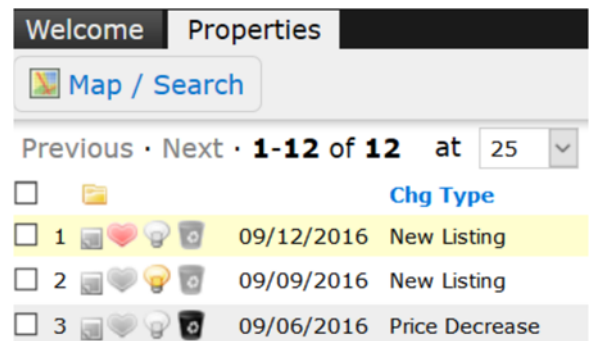


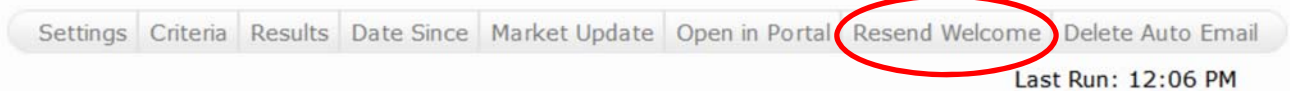
About AUTO-EMAILS

- 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**.
- 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.
- 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.
- **If you bcc yourself** (to receive a notification that an auto-email when to your contact), **you will also be able to edit the "Favorite", "Possibility" or "Discard" icons in the portal for your client.** >>



- After clicking **Save** to generate your first 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.



- Workaround Tip- if you add a non-Matrix email for yourself as the cc address before resending, you may then activate the auto-emails for the client. After doing so, go back in and remove yourself in settings.
- 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 an **Auto-Email is not opened by your client, after being activated** (see above), it will be disabled after 365 days. You may then make it active again and resend Welcome message.
- In the client clicks on any link in the 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
 - **Note:**
 - **An email is NOT sent when new pictures are added to a listing**
 - **What shows in your client’s 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 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 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. 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 only discarded unwanted matching listings.
- Auto-emails are going to spam: Client should add the following email to their whitelist 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:** Go to the **My Matrix** Tab and select **“Settings”**
- **Step 2:** Click on **“Portal Notification Settings”**
- **Step 3:** Select the Check box of Client 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.

| 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 checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Saves a Favorite | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Removes a Favorite | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Saves a Possibility | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Removes a Possibility | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Discards a Listing | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Un-discards a Listing | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Adds Notes | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Saves a Search | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Visits Portal First Time | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" 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 CRMLS@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”**