

## “Who, What, and How to” Auto Email

Do you have clients that would like to have listings sent to them via email? Or do you have questions regarding Automatic Email? Below are the top questions asked by your peers.

### Q. How do I create an Auto Email?

A. Follow these steps to create an Auto Email:

1. After searching for listings, click **Save** from your search results to save your search criteria.
2. Enter a Search Name, Description, and select a Primary Email Contact. If your client’s contact information is not in our system, click the “Create A New Contact” link to add your client’s information. Click on **Enable Auto Email**
3. Enter your Automatic Email settings and select a schedule for your client. The schedule will identify how often you want Matrix to email your client. Click **Save** to save your changes and enable auto email.

### Q. What does “Waiting Activation” mean when I create an Auto Email?

A. “Waiting Activation” means that your email recipient has **not** viewed listings that were sent to them in a link from the Auto Email. After your client has viewed the listing, the “Waiting Activation” status will be removed.



### Q. How can my client select listings as their Favorites?

A. When your client views listings from their Auto Email, they can select listings as their Favorites or Possibilities, and Discard any unwanted listings. These listings are placed in Favorites or Possibilities, and Discarded tabs. This will allow you, the agent, to know your client’s preferred listings.



### Q. How can I view my client’s Favorite listings?

A. To view your client’s Favorite, Possible, and Discarded listings click on the “**Open Portal**” link in Saved/Automatic Searches under the My Matrix tab. Then click the **favorites** tab to view your client’s choice of favorite listings.

