Text of Emails Sent from Matrix

This document gives you an overview of when different emails are sent from Matrix and what text is used for each email type if you don't enter custom text. If you create an email signature under My Matrix→My Information, it will be used for all emails.

Welcome Emails

The first time you set up an Auto Email for a new contact, they'll receive an email that welcomes them to their Client Portal and helps them get started using it.

Subject: Displays the subject you have chosen for the Auto Email

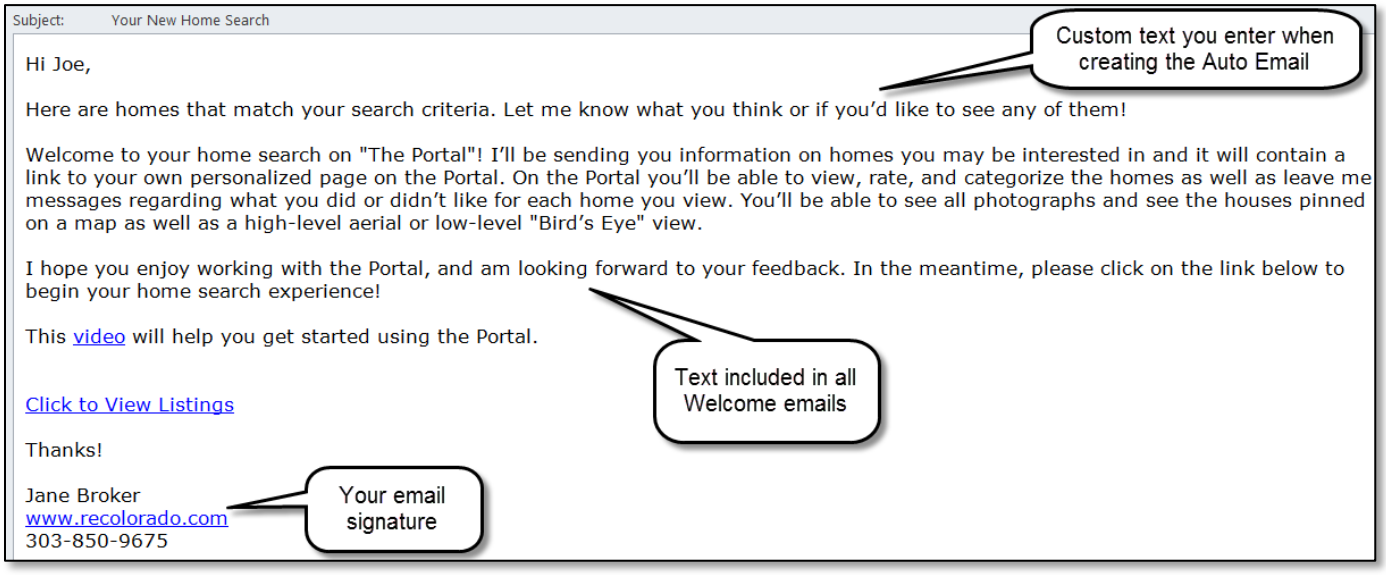
Email Body:

- If you enter custom text when creating the Auto Email, it will display in the body of the Welcome email.
- If you have entered no custom text, then "*Hi*" and the contact's name will display.
- All Welcome emails display the introduction to the Client Portal:
  "Welcome to your home search on "The Portal"! I'll be sending you information on homes you may be interested in and it will contain a link to your own personalized page on the Portal. On the Portal you'll be able to view, rate, and categorize the homes as well as leave me messages regarding what you did or didn't like for each home you view. You'll be able to see all photographs and see the houses pinned on a map as well as a high-level aerial or low-level "Bird's Eye" view.

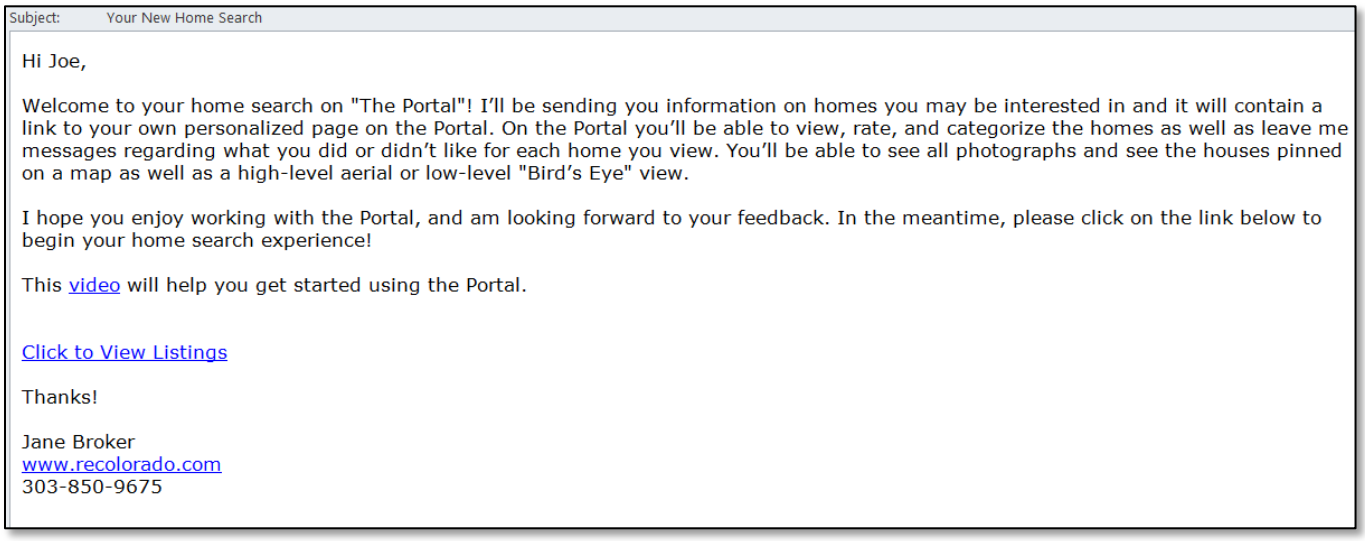
  I hope you enjoy working with the Portal, and am looking forward to your feedback. In the meantime, please click on the link below to begin your home search experience!

  This video will help you get started using the Portal."
- Finally, they will see a link "*Click to View Listings*" that will open their Client Portal.

Welcome Email with Custom Text Entered



Welcome Email with No Custom Text



Update Emails

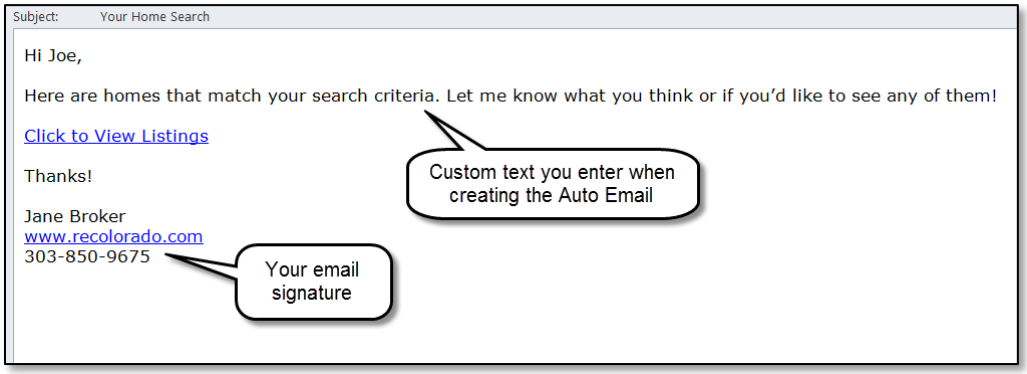
As new or updated listings match the Auto Email's criteria, your contact will receive update emails based on the frequency you selected when creating the Auto Email.

Subject: Displays the subject you have chosen for the Auto Email

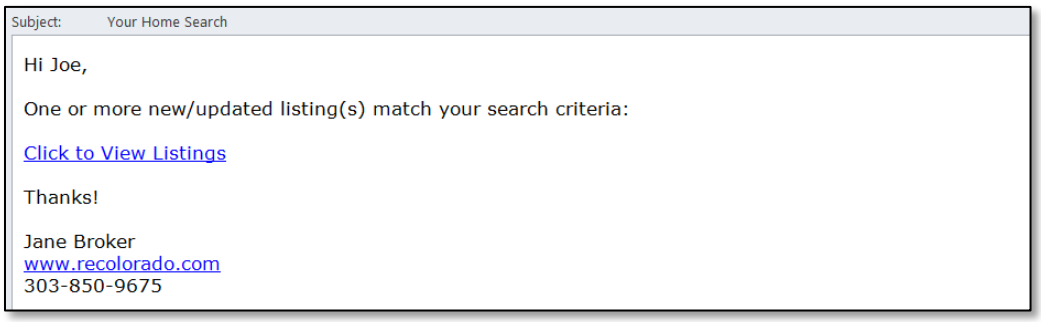
Email Body:

- If you entered custom text, your text will display followed by a link "*Click to View Listings*".
- If you have not entered custom text, then the contact will see "Hi" followed by their name and the text "*One or more new/updated listing(s) match your search criteria*:" with a link "*Click to View Listings*" that will open their Client Portal.

Update Email with Custom Text Entered



Update Email with No Custom Text Entered



Revised Search Criteria

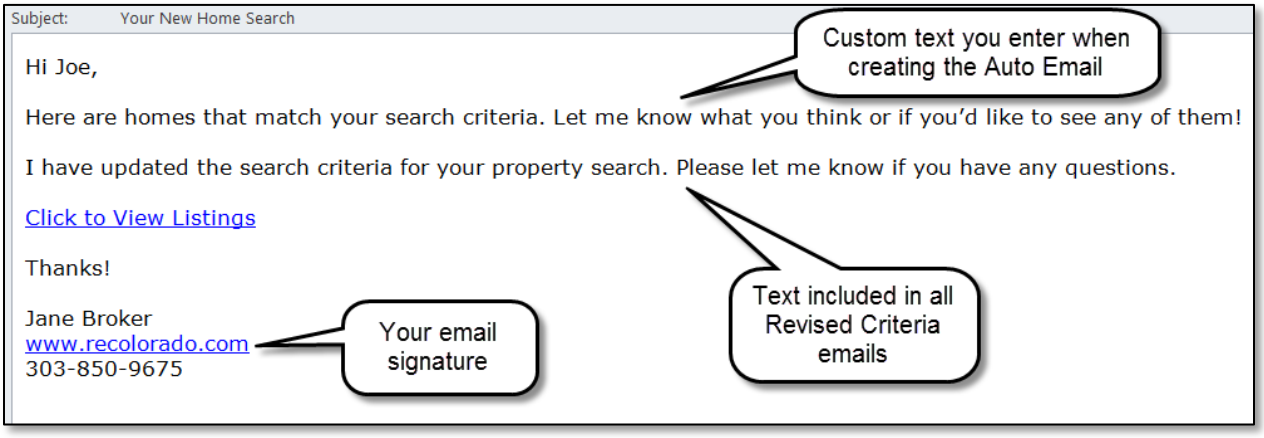
When you revise the search criteria for an auto email, the contact is sent an email letting them know the criteria has been changed.

Subject: Displays the subject you have chosen for the Auto Email

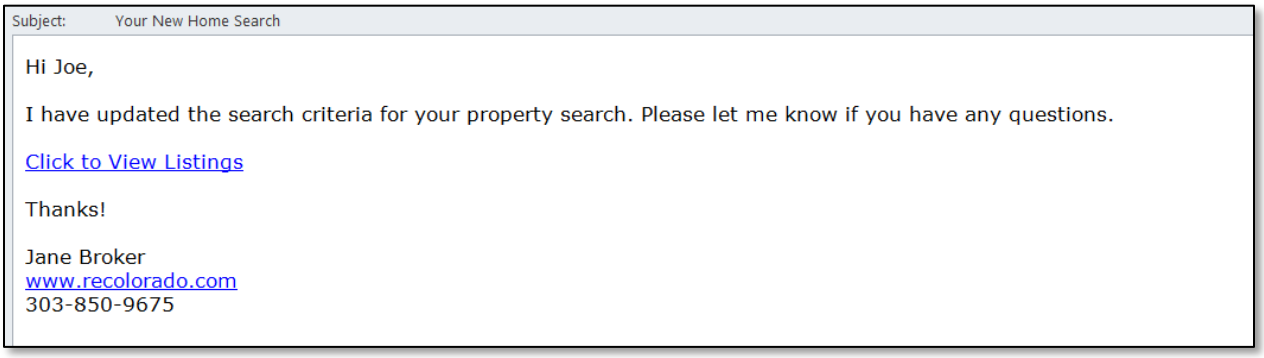
Email Body:

- If you entered custom text when creating the Auto Email, your text will display.
- If you have not entered custom text, then the contact will see "*Hi*" followed by their name.
- All emails include text letting them know the criteria is changed:
  "*I have updated the search criteria for your property search. Please let me know if you have any questions."*
- Finally, they will see a link "*Click to View Listings*" that will open their Client Portal.

Revised Criteria with Custom Text Entered



Revised Criteria with No Custom Text Entered



Direct Emails

When you email individual listings, CMAs, or other information, contacts receive an email with a link to their Client Portal to review the information.

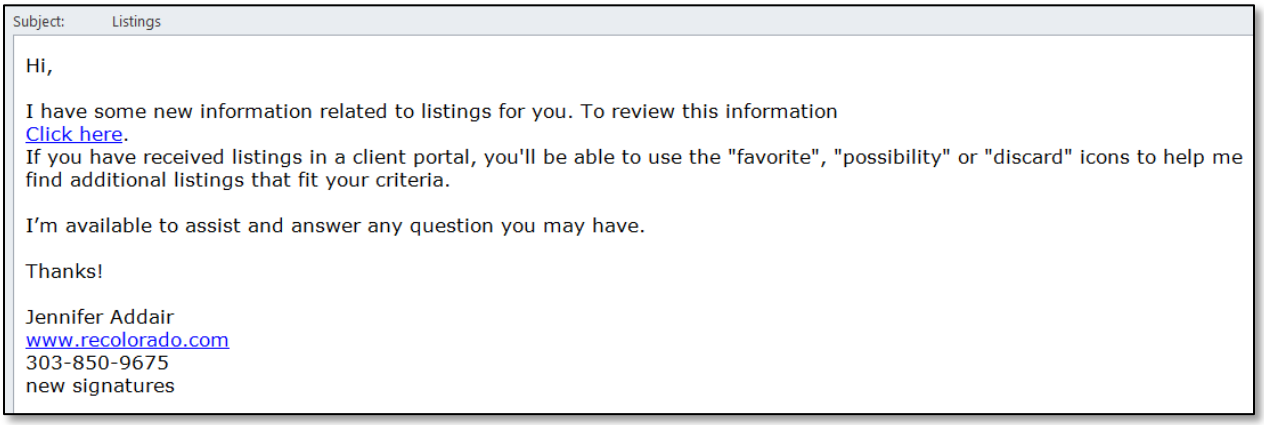
Subject: Displays the subject you entered when sending the email, or "Listings" if you did not enter a subject.

Email Body:

- If you have entered custom text, your text will display followed by "*To view these listings Click here*".
- If you have not entered custom text, the contact will see this message:
  "Hi,
  I have some new information related to listings for you. To review this information Click here.
  If you have received listings in a client portal, you'll be able to use the "favorite", "possibility" or "discard" icons to help me find additional listings that fit your criteria.

  I'm available to assist and answer any question you may have."

Default Email for Sending Listings, CMAs, or Other Information


Subject: Listings

Hi,

I have some new information related to listings for you. To review this information
Click here.
If you have received listings in a client portal, you'll be able to use the "favorite", "possibility" or "discard" icons to help me find additional listings that fit your criteria.

I'm available to assist and answer any question you may have.

Thanks!

Jennifer Addair
www.recolorado.com
303-850-9675
new signatures

Other Matrix-Generated Emails

There are a variety of actions that will cause you (not your clients) to receive emails from Matrix:

- **Client Unsubscribed**: Lets you know that your client has unsubscribed from one of your Auto Emails.
- **Limit Exceeded**: If your Auto Email returns 250+ listings, it is deactivated. This email lets you know it has been deactivated and provides the steps to reactivate it.
- **No Listings Found**: If your Auto Email has had no matching listings in the past 90 days, it will be deactivated.
- **Emails Ignored**: If your contact has not clicked on a link from one of their update emails in the past 60 days, the Auto Email will be deactivated. This email lets you know it has been deactivated and provides the steps to reactivate it.
  Note: The Client Portal will remain active if the contact has other activity in it.
- **Errors or Invalid Email Address:** If the email address is invalid or there are other errors, you'll receive an email letting you know the reason why the email has been deactivated.