

Prospect Autonotification

In Matrix, prospects are referred to as "Contacts" and Autonotification is referred to as "Auto-Email." To set-up Auto-Email, first you need to have one or more Contacts set up.

Set Up Contacts

1. Click the "My Matrix" tab, then click the link "Contacts."
2. Click the "Add Contact" button.
3. Fill in all the information you want for the contact. The only required fields are First Name and Last Name. However, you must fill in an email address if you want to set-up this contact for auto-email. When you are finished, click the "Add" button. Now you are ready to set-up a Search.

Save a Search and Enable Auto-Email:

1. Run a search and click the "Save" button at the bottom of the page. Click the "New Auto Email" button.
2. Click the Primary Email Contact drop down box to select the Contact you want to assign to this search.
3. Fill in the Subject for the new Auto Email.
4. If you want, you can choose BCC: field and click the select box to send yourself a separate copy.
5. In the settings section, you can choose to send the auto email in concierge mode, or save it as a favorite search on your Home tab.
6. Choose a schedule for sending the auto emails (ASAP, or Daily) by clicking the appropriate radial button.
7. Click the "Save" button. Matrix will immediately email the search results to your Contact. As new listings meet your search criteria, they will be automatically emailed to your Contact.