

Generate a Prospect Report

A prospect report informs you of any new listings that match your Auto Email search criteria since the last time the search was run or for a specified time range.

- Hover over “My Matrix” 1
- Select “Auto Emails” 2
 - A list of your Auto Emails present 3

Auto Emails (6) 3

<input type="checkbox"/>	Status	Subject	Contact Name	BCC	Schedule	Concierge	Portal Visit	Ref#
<input checked="" type="checkbox"/>	✓	Jamies house Test	Burke, Ry	-	ASAP	-	yesterday	0104
<input checked="" type="checkbox"/>	○	Subject	Burke, Ry	-	-	6	never	0186
<input checked="" type="checkbox"/>	○	Weekend test of concierge	Burke, Ry	Yes	-	112	never	0104
<input type="checkbox"/>	○	Cow Properties	Lennox, Annie	-	Daily	-	never	0111
<input type="checkbox"/>	✓	Castle Rock Town Homes	Waits, Tom	-	ASAP	-	09/10/2013	0160
<input type="checkbox"/>	✓	CR Radius Search	Waits, Tom	-	ASAP	-	Wednesday	0160

4 5 Delete Disable Market Update

My Matrix 1

- Summary
- Contacts
- My Listings
- My Information
- Saved Searches
- Auto Emails 2
- Sent Email
- CMA's
- Settings
- Portal Greeting

- Place a **check mark** next to the auto emails of interest 4
 Note: Up to 15 can be selected at one time
- Select “Market Update” 5
- The “Market Update Options” screen present 6

Market Update Options 6

This advanced market update section allows you to optionally choose an update type and/or update date range in combination with the criteria of the original search.

Use Last Run Date: (Using last run time from each selected search.)


Specify Update Date/Range: 7

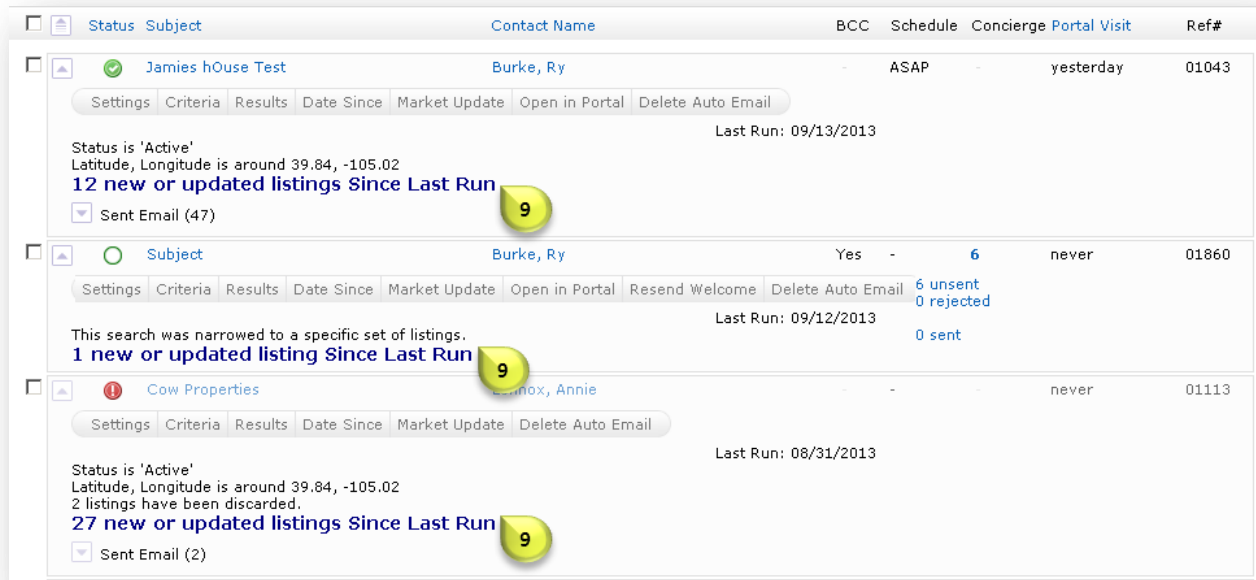
Example: 7/1/2004+
7/1/2004-7/31/2004
0-60

8 Run Update Cancel

- Select “Use Last Run Date” or “Specify Update Date/Range” 7
- Click “Run Update” 8

Matrix How To

- A list of your Auto Emails will present with links  indicating how many new matches there are



The screenshot displays a table of Auto Email configurations. Each row represents a different email setup, with columns for Status, Subject, Contact Name, BCC, Schedule, Concierge, Portal Visit, and Ref#. Below each row are various action buttons and details about the email's status and performance.

Status	Subject	Contact Name	BCC	Schedule	Concierge	Portal Visit	Ref#
Active	Jamies house Test	Burke, Ry	-	ASAP	-	yesterday	01043
Active	Subject	Burke, Ry	Yes	-	6	never	01860
Active	Cow Properties	...nox, Annie	-	-	-	never	01113

Key details from the screenshot:

- Jamies house Test:** Last Run: 09/13/2013. Status is 'Active'. Latitude, Longitude is around 39.84, -105.02. **12 new or updated listings Since Last Run**. Sent Email (47).
- Subject:** Last Run: 09/12/2013. This search was narrowed to a specific set of listings. **1 new or updated listing Since Last Run**. 6 unsent, 0 rejected, 0 sent.
- Cow Properties:** Last Run: 08/31/2013. Status is 'Active'. Latitude, Longitude is around 39.84, -105.02. 2 listings have been discarded. **27 new or updated listings Since Last Run**. Sent Email (2).

- Click on any of these links to review the new results for the specified Auto Email