

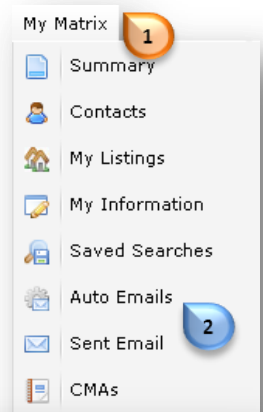








Interpret the Auto Email Dashboard

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



Auto Emails (6) 

Search: Filter: ... choose a filter

				BCC	Schedule	Concierge	Portal Visit	Ref#
<input type="checkbox"/>	Jamies h0use Test	Burke, Ry	-	-	ASAP	-	yesterday	01043
<input type="checkbox"/>	Subject	Burke, Ry	Yes	-	-		never	01860
<input type="checkbox"/>	Cow Properties	Lennox, Annie	-	-	-	-	never	01113
<input type="checkbox"/>	Weekend test of concierge	Lennox, Annie	-	-	MTWT	-	never	02779
<input type="checkbox"/>	Castle Rock Town Homes	Waits, Tom	-	-	-	-	09/10/2013	01601
<input type="checkbox"/>	CR Radius Search	Waits, Tom	-	-	ASAP	-	Wednesday	01602

Status


 Presents 3 icons indicating the Status of auto emails

- Auto Email is Active, but the Contact has not yet logged in and activated their portal
- Auto Email is Active and has been accessed by the Client
- Auto Email is disabled

Subject

 Is the title given to the Auto Email

Contact Name

 The client who assigned to the Auto Email

BCC

 “Yes” indicates that you requested to be BCC’d on auto emails

Auto Emails (6) Search: Filter:

<input type="checkbox"/>	Status	Subject	Contact Name	BCC	Schedule	Concierge	Portal Visit	Ref#
<input type="checkbox"/>	✓	Jamies hOuse Test	Burke, Ry	-	ASAP	-	yesterday	01043
<input type="checkbox"/>	○	Subject	Burke, Ry	Yes	-	6	never	01860
<input type="checkbox"/>	!	Cow Properties	Lennox, Annie	-	-	-	never	01113
<input type="checkbox"/>	○	Weekend test of concierge	Lennox, Annie	-	MTWT	-	never	02779
<input type="checkbox"/>	!	Castle Rock Town Homes	Waits, Tom	-	-	-	09/10/2013	01601
<input type="checkbox"/>	✓	CR Radius Search	Waits, Tom	-	ASAP	-	Wednesday	01602

Schedule

ASAP – As Soon As Possible



MTWTFSS – Indicate the days of the week an Auto Email has been scheduled

Dash – Indicates Concierge or disabled Auto Email

Concierge



Indicates the number of results requiring approval

Portal Visit



Indicates when your client last accessed the Client Portal

Never, Yesterday, days of the week and dates will present

REF



This is a place holder for reverse prospecting