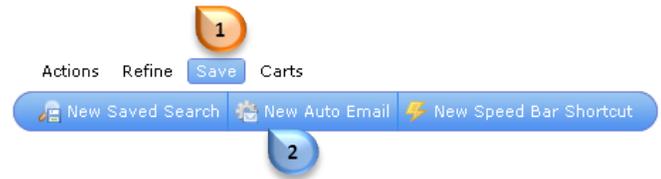


Create an Auto Email

- Create a Search in Matrix
- From the search Results tab click “**Save**” on the floating toolbar at the bottom of the page



- Click “**New Auto Email**” on the button bar

Note: If you are setting yourself up for Auto Emails enter your email

- Complete the “Save a New Auto Email” screen

- Choose or enter a contact



- Check the BCC box to receive a copy of the Auto Email notifications sent to your client
- Enter a subject
- The system will generate default Welcome and Recurring Messages that you can customize
- Verify your email signature

Save a New Auto Email

Recipients

Contact: [Create a New Contact](#)

To:

CC:

BCC me a copy of all emails

Message

Subject:

Welcome Email Recurring Email

Salutation:

Message:
[Click here to learn about your](https://youtu.be/UfXop5JsKRg)
 Check Spelling [English](#)

Signature: Stacy Anderson Oakes
 REcolorado
 303-850-9576
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www.recolorado.com

- Choose the appropriate settings

Note: Concierge mode means that all results come to you – you decide which ones to forward to your client. Concierge Auto Emails cannot be scheduled. Please see How Use the Concierge Option

- Choose the desired schedule

- Click “**Save**”

Settings

Concierge: Enable concierge mode

Make available for Reverse Prospecting

Enable as a Favorite Search on Home tab (10 maximum)

Schedule

ASAP: Emails are sent as soon as possible.

Daily: Emails are sent on the days you choose.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM						
<input type="checkbox"/> All PM	<input type="checkbox"/> PM						

[Clear](#)

Monthly: Emails are sent on the first of the month at midnight.