

Use the Concierge Option

The Concierge Auto Email option sends search results to you for approval before being sent to a contact.

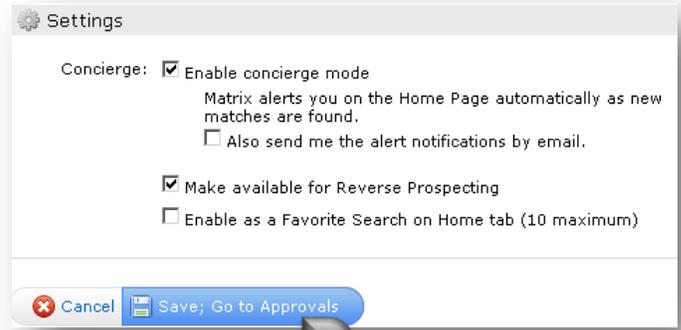
- Create a Search in Matrix
- From the Results tab click **“Save”**  on the floating toolbar at the bottom of the page
- Click **“New Auto Email”**  on the button bar
- Complete the **“Save a New Auto Email”** screen 



- Choose or enter a contact
- Check the BCC box to receive a copy of the portal notifications sent to your client
- Enter a subject
- Enter a Message to your client
- Verify your email signature

- Click the box next to **“Enable concierge mode”** 
 - The Settings section will change

- Choose the appropriate settings
- Click **“Save; Go to Approvals”**



- The Concierge Approval Page will appear with results that meet your search criteria



- Click the check box next to properties you want to reject or approve
- Click **“Reject”** or **“Approve Selected”**



- When new matches meet your saved Concierge Auto Alerts, an alert will appear on your Matrix Dashboard
- Click the link to open the Concierge Approvals page to reject or approve

