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" 1 on Actions Refine Carts ٠ 🛵 New Saved Search 📸 New Auto Email 🛛 🥰 New Speed Bar Shortcut the floating toolbar at the bottom of the 2 page Click "New Auto Email" on the button bar Complete the "Save a New Auto Email" screen 3 👸 Save a New Auto Email 3 🚨 Recipients Choose or enter a contact Contact: Create a New Contact To: CC: Check the BCC box to receive a BCC me a copy of all emails copy of the portal notifications Subject: sent to your client Message: Enter a subject Enter a Message to your client Verify your email signature Check Spelling English Signature: Ry Burke 888 888 88888 Edit Your Signature 🔲 Criteria: This search was narrowed to a specific set of listings. 2 listings have been discarded. Click the box next to "Enable 👌 Save a New Auto Email 🐣 Recipients concierge mode" 5 5 Contact: - Crea Contact The Settings section will To: CC: change BCC me a copy of all emails



- Choose the appropriate settings
- Click "Save; Go to Approvals"

🎲 Settings	
Concierge:	 Enable concierge mode Matrix alerts you on the Home Page automatically as new matches are found. Also send me the alert notifications by email. Make available for Reverse Prospecting Enable as a Favorite Search on Home tab (10 maximum)
😢 Cancel 📳	Save; Go to Approvals

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

	Concierge Approvals Page: Tom Waits (3)																		
7	🛅 These 3 listings found by 'jf' need your approval. They are not yet visible.																		
\smile	Previous · Next · 1-3 of 3 · Checked 0 · All · None Display Single Line 💌 at 5															• at 50 •			
			Emailed				MLS #	St	Style	Address	City	Zip	List/Sold \$	Beds	Baths	Total Sc	Fin Sqft	Listing Office	
					i	Ø	<u>1196688B</u>	Α	Ranch/1 Story	8180 ORCHARD Drive	Denver	80221	\$190,000	4	3	2243	2,100	Re/Max Alliance	
					1	Ø	1205347B	A	2 Story	8091 CLAY Street	Westminster	80031	\$229,000	4	3	2772	2,729	LT Realty Inc.	
0					1	Ð	<u>1205379B</u>	A	Ranch/1 Story	7461 DECATUR Street	Westminster	80030	\$215,000	4	2	2442	2,292	Coldwell Banker	Residential 18
	Actions Carts																		
	🖌 Done 📑 Show 34 Rejected 📑 Reject 🗟 Approve All 3												[1] · Previous						

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

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- When new matches meet your saved Concierge Auto Alerts, an alert will appear on your Matrix Dashboard
- Click the link 11 to open the Concierge Approvals page to reject or approve



