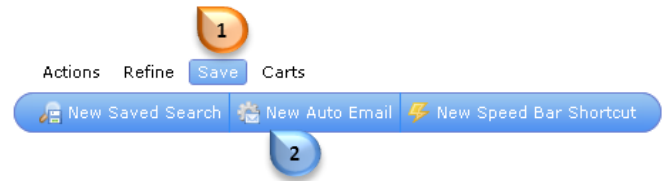


Create an Auto Email

- 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

3

- Check the BCC box to receive a copy of the portal notifications sent to your client

4

- Enter a subject
- Enter a Message to your client
- Verify your email signature

Save a New Auto Email

Recipients

Contact: [Create a New Contact](#)

To:

CC:

BCC me a copy of all emails

Subject:

Message:

[Check Spelling English](#)

Signature: Ry Burke
888 888 8888

[Edit Your Signature](#)

Criteria:

This search was narrowed to a specific set of listings.
2 listings have been discarded.

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 checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

[Clear](#)

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

- 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

5

- Choose the desired schedule

6

- Click **“Save”**

7