

Generate a Search in *Matrix*

From the *Search Results* tab **1** click "**Save**" **2** on the *floating toolbar*

Listing ID	St	SType	Address	City	Price	Bd	Bth	Abv	Ttl	Fin	Prk	Ttl	Asso
3347085	A	SFR	4816 S Elk Way	Aurora	\$430,000	3	3	1,982	2,877	1,982	2	Yes	
7904288	A	SFR	5912 S Waco Street	Aurora	\$429,900	4	3	1,752	2,294	2,294	2	Yes	
6695936	A	SFR	7394 S Memphis Street	Aurora	\$429,500	3	3	1,765	2,237	1,765	2	Yes	
6863106	A	SFR	18328 F Lake Avenue	Aurora	\$422,500	3	3	1,767	2,220	1,767	2	Yes	
2416790	A	SFR	4992 S Eaton Parkway	Aurora	\$420,000	3	3	1,494	2,978	1,634	2	Yes	

Click "**New Auto Email**" **3**

Complete the **Save a New Auto Email form** **4**

Note: All fields in yellow are mandatory and must be filled in

Save a New Auto Email **4**

Recipients

Contact: [Dropdown] [Create a New Contact](#) **5** **6**

To: [Field]

CC:

BCC me a copy of all emails **7**

Message

Subject: [Field] **8**

Choose an existing **Contact** by clicking on the *expand collapse arrow*, **5** or click on "**Create a New Contact**" **6**

Check the "**BCC me a copy of all emails**" **7** to receive a copy of all *Auto Email notifications* that are sent to your client

In the **Subject** **8** field, create a name for the *Auto Email* that is easily recognizable

A default message will present in both the **Welcome** and **Recurring Email** tabs ⁹
 You have the option to customize both messages

Verify your email **signature** ¹⁰

Choose the appropriate **Settings** ¹¹

Note: Concierge mode will notify you via the **Concierge Widget** and/or email, of properties that match the *auto email*. You must review and *approve* or *reject* each listing. *Approved* listings will then be sent to the client via the *Client Portal*. When using concierge mode the **Schedule** option will not appear.

See **How Use the Concierge Option**

Select the desired **Schedule** ¹²

Click **"Save"** ¹³