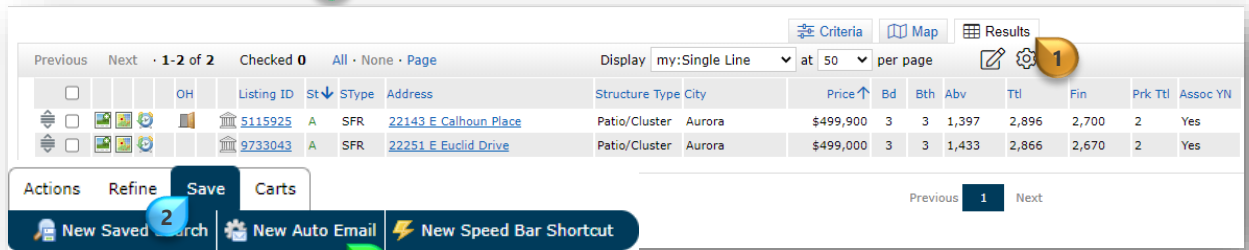


The *Concierge* option under *Auto Email* sends *Auto Email* results to you for review and approval. Listings that are approved are sent to a contact via the *Client Portal*.


Create a Search in *Matrix* based on your client's criteria

From the **"Results"** tab  click **"Save"**  on the *hovering toolbar*

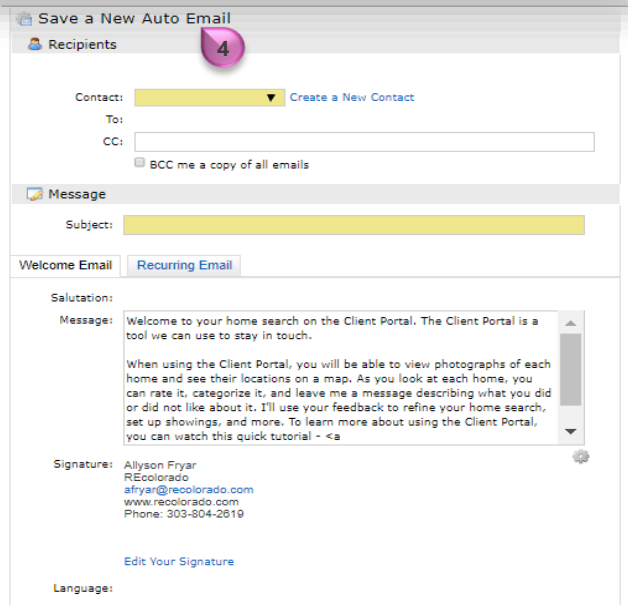
Click **"New Auto Email"**  on the *button bar*




Listing ID	St	SType	Address	Structure Type	City	Price	Bd	Bth	Abv	Ttl	Fin	Prk	Ttl	Assoc	YN
5115925	A	SFR	22143 E Calhoun Place	Patio/Cluster	Aurora	\$499,900	3	3	1,397	2,896	2,700	2			Yes
9733043	A	SFR	22251 E Euclid Drive	Patio/Cluster	Aurora	\$499,000	3	3	1,433	2,866	2,670	2			Yes

Complete the **Save a New Auto Email Screen** 

Note: Every field highlighted in yellow is mandatory and must be completed



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: Welcome to your home search on the Client Portal. The Client Portal is a tool we can use to stay in touch.


When using the Client Portal, you will be able to view photographs of each home and see their locations on a map. As you look at each home, you can rate it, categorize it, and leave me a message describing what you did or did not like about it. I'll use your feedback to refine your home search, set up showings, and more. To learn more about using the Client Portal, you can watch this quick tutorial - a

Signature: Allyson Fryar
REcolorado
afryar@recolorado.com
www.recolorado.com
Phone: 303-804-2619

[Edit Your Signature](#)

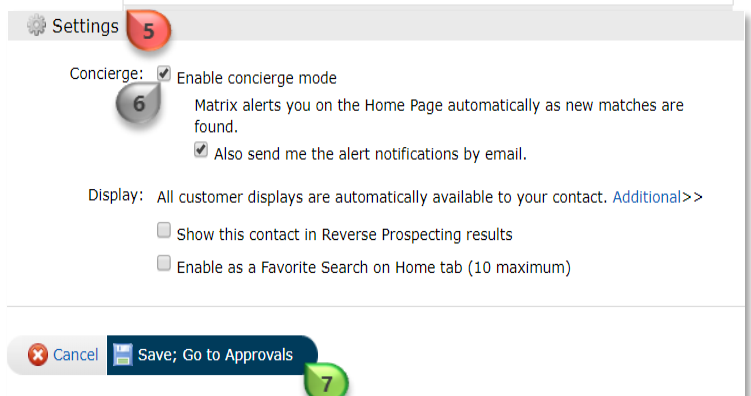
Language: _____


Under *Settings* 


Click the box next to **"Enable concierge mode"** 

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.

Display: All customer displays are automatically available to your contact. [Additional>>](#)

Show this contact in Reverse Prospecting results

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

The **Concierge Approvals Page** ⁸ presents results matching the desired criteria

Concierge Approvals Page: Stacy and Chad Ao (2) Map Results

These 2 listings found by ⁸ '6 Patio' need your approval. They are not yet visible.

Previous Next · 1-2 of 2 · Checked 1 · All · None Display Single Line at 100 per page

<input type="checkbox"/>	Emailed	OH	Listing ID	St	SType	Address	City	Price	Bd	Bth	Abv	Ttl	Fin	Prk Ttl	Assoc YN
<input checked="" type="checkbox"/>	Never		5115925	A	SFR	22143 E Calhoun Place	Aurora	\$499,900	3	3	1,397	2,896	2,700	2	Yes
<input type="checkbox"/>	Never		9733043	A	SFR	22251 E Euclid Drive	Aurora	\$499,000	3	3	1,433	2,866	2,670	2	Yes

Actions Carts

Done Reject Approve Selected Print Directions

Previous 1 Next

Select the *checkbox* next to the property(ies) you want to *reject* or *approve* ⁹

Select **"Reject"** ¹⁰ or **"Approve Selected"** ¹¹

When new matches meet the saved *Concierge Auto Email criteria*, an alert will appear on the *Matrix Dashboard*

Click the notification icon ² ¹² to open the **Concierge Approvals** page, *reject* or *approve* the properties as needed

RECOLORADO **My Matrix** Search Stats Realist Tax Finance Links Input

Working as Stacy Anderson-Oakes ²

Enter Shorthand or MLS# ¹² Recent Searches

News & Alerts

There are no active news postings.

My Listings

Market Watch

New Listing (6)

Coming Soon (0)

Back On Market (1)

Price Increase (1)

Price Decrease (5)

Hot Sheets

Residential Land

Residential Income

Cross Property

Residential Lease