

Turning on Auto Email in Matrix from your migrated Contacts with Searches.

Your Saved Searches will display in Matrix and be attached to your Contact, however each Saved Search Auto Email will need to be made Active on a search-by-search basis.

1. Click on the name of the Saved Search (My Matrix > Saved Searches).



2. Click on Settings.



3. Verify the Contact's Name the Saved Search is associated with AND the Search Criteria.
4. Click the link **"Turn this Saved Search into an Auto Email."**

Turn this Saved Search into an Auto Email

Settings for 'Area 1A High End'

Search Name: Area 1A High End

Contact: Dillion, Matt [Create a New Contact](#)

Enable as Favorite Search on Home tab (10 maximum)

Criteria:

Status is one of 'Active', 'Active Contingent'
Property Sub Type is 'House'
Area is '1A'
Current Price is 800000+

5. The Recipients will default to the Contacts' information you just attached to. If you wish to change this, click the drop-down menu and select a different Contact.
6. Write a Subject line and message to your Contact with information about the new Portal format they will now be using to view properties. (NOTE: A Subject line is required to setup the email.)
7. You may also select the options to enable the Concierge mode or save the search as a Favorite to display on your Home Page. Concierge mode allows you to pre-approve listings before they are sent to a Contact. If Reverse Prospecting is available, select that option if desired.
8. Schedule the frequency for Contact's notifications.
9. Click Save.

[Turn this Auto Email into a Saved Search](#)

Settings for 'Area 1A High End'

Recipients

Contact: **Dillion, Matt** [Create a New Contact](#)

To: meyersjay@gmail.com (Dillion, Matt)

CC:

BCC me a copy of all emails

Subject:

Message:

Check Spelling [English](#)

Signature: Jay Meyers Core Austin 1234 River Road Austin, TX 78954 888-999-9203
<http://www.corelogic.com/>

[Edit Your Signature](#)

Criteria:

Status is one of 'Active', 'Active Contingent'
Property Sub Type is 'House'
Area is '1A'
Current Price is 800000+

Settings

- Concierge: Enable concierge mode
- Show this contact in Reverse Prospecting results
- 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 type="checkbox"/> All PM	<input type="checkbox"/> PM						

[Clear](#)

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

Cancel

Save

Your Contact will get an initial email with a Portal Greeting Message (similar to).

Welcome to "The Portal"

All messages I send to you containing listing information - those I send you manually as well as those I set our system to send you automatically - will contain a link to your personalized page on The Portal.

You can access The Portal with your favorite web browser, where you'll be able to view the listing information I've prepared for you in several different formats. For your convenience, you'll be able to sort these listings, rate them and categorize them. You'll be able to see all associated photographs. And you'll be able to see them pinned on a map, a high-level aerial photograph or a low-level "Bird's Eye" photograph.

I hope you enjoy working with The Portal and would be happy to hear your feedback. In the meantime, please click on the link below to begin your Portal experience.

Complete information on how to use The Portal is available via the Help Tab - located next to the Properties tab near the top right of the screen.

Click the following link to view ALL property listings
[View Listings in Portal](#)

Jay Realtor
 Core Austin
 1234 River Road
 Aunytown, TX 78954
[888-999-9203](tel:888-999-9203)

Note: The Web link above will expire 30 days after the date of this email.
 Delivered By CoreLogic, Inc. | 40 Pacifica, Irvine, CA 92618
[Click this link if you wish to Unsubscribe.](#)

The Search results for this Auto Email will appear.

The screenshot shows a search results page with a header for 'TOP REAL ESTATE AGENT' and a navigation bar. The search criteria are 'Area 1A Search for Matt'. The results are displayed in a table with columns for date, status, MLS #, address, and property details.

Received	Chg Type	MLS #	S Address	Bds	Fb	Hb	St	Gar	Yr	BlT	Sqft	Acres	L Price	Type
11/30/2014	New	8309454	A 8612 Mesa DR	3	2	0	1	2	1968	2,170	0.333		\$575,000	RES
11/28/2014	Back On Market	4858056	A 5906 MOUNTAIN VILLA DR	3	2	1	2	2	1987	2,490			\$550,000	RES
11/20/2014	New	5723600	A 8807 Point West DR	3	2	0	1	2	1968	2,207	0.228		\$515,000	RES
11/20/2014	New	6642639	A 4305 Wildridge CIR	3	2	0	1	2	1972	1,700	0.257		\$509,000	RES
11/18/2014	Price Decrease	9426610	A 4115 Honeycomb Rock CIR	4	2	0	1	2	1965	2,281	0.220		\$565,000	RES

The Auto Email Link will then be accessible in the Auto Searches section of the Portal. (NOTE: The subject line in the Auto Email setup is the name of the clickable link under Auto Searches within the Portal.)

The screenshot shows an email message from Jay Meyers with the Hauseller Real Estate logo. Below the message, there are sections for 'Direct Emails and Reports', 'Recent Notes', 'My Searches', and 'Auto Searches'. The 'Auto Searches' section is highlighted, showing 'Area 1A High End' and 'Area 1A Search for Matt'.

Recent Notes

MLS #	Note	Noted
5189663	Me Like the entrance, can we see it Tuesday?	Jun 15 2014
	Jay Meyers Yes, 3.30 OK?	Jun 15 2014
5846786	Me Why is it back on the market?	Jun 15 2014
	Jay Meyers Financing did not happen, now is the time to make a move on this one.	Jun 15 2014
8866924	Me Like this one a lot!	Aug 19 2014
	Jay Meyers Me too	Aug 19 2014

Auto Searches

- Area 1A High End
- Area 1A Search for Matt

