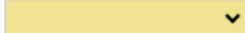


Auto Email Quick Reference Guide

Contact: 

Allows you to specify a particular client that is already in your contacts.

[Create a New Contact](#)

Allows you to add a new client. Filling out the form will generate a new contact card for this client. Through this page you can enable reverse prospecting. If you click "more" you can add more fields like address or can mark the client as mortgage pre-approved

BCC me a copy of all emails

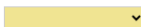
Allows you to BCC yourself to a listing.

Also send link via SMS text message

Allows you to request texting for your client. They will get the opt-in request via email

Save a New Auto Email

Recipients

Contact:  [Create a New Contact](#)

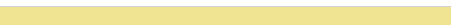
To:

CC:

BCC me a copy of all emails

Also send link via SMS text message

Message

Subject: 

Welcome Email [Recurring Email](#)

Salutation:

Message: I've set up a new saved search for you on OneHome. I'll send you any new or updated listings that match what you're looking for.

Let me know what you think of the listings - we can adjust your saved search at any time. You can also like or dislike and leave notes for me on any listing.

Signature: Angela Brown MARIS

[Edit Your Signature](#)

Criteria:

Transaction Type is one of 'Sale', 'Auction'
Status is one of 'Active', 'Active Under Contract'
State Or Province is 'Missouri'
City is 'Affton'

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.

All AM AM AM AM AM AM AM AM

All PM PM PM PM PM PM PM PM

[Clear](#)

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

Welcome Email

Under this tab you will be able to customize the initial email sent to the client. If you want to save the drafted email as your new default welcome email, click the gear



The gear will allow you to save your current email as your new default auto email. The gear will also allow you to reset the welcome email to the system default message

[Edit Your Signature](#)

This quick link will allow you to edit your email signature. This will change your email signature across the system not just for one email.

[Recurring Email](#)

Under this tab you will be able to set a recurring email message for your client

ASAP: Emails are sent as soon as possible.

Sends an email to the client regardless of time. Beware: This means that if a listing goes live early in the morning or late at night, the client will get notified

Daily: Emails are sent on the days you choose.

All AM AM AM AM AM AM AM AM

All PM PM PM PM PM PM PM PM

[Clear](#)

Allows you to specify if you would like to have the client get their auto emails on a certain day. If you choose the morning options, the emails typically go live at approximately 8 am. If you choose PM, these typically go live around 5 or 6 PM

Enabled

Disabled

This will allow you to enable or even disable your auto email without deleting it.

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

Selecting this will add this clients search to your Matrix home screen

Enable concierge mode

Selecting this will enable concierge mode. This will allow you to approve each listing before it is sent to your client

Show this contact in Reverse Prospecting results

Clearing this checkbox will hide this contact in ALL reverse prospecting results, not just results for this auto email.