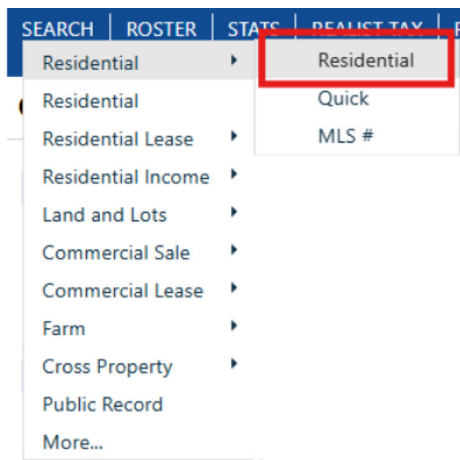


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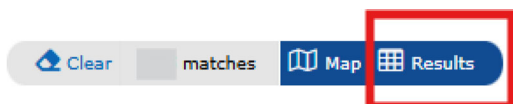
How to Create an Auto Email

To create an auto email, go to the search tab.

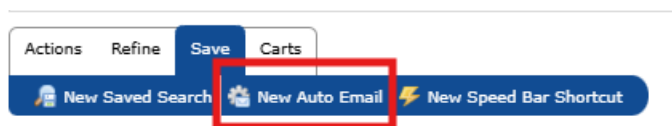
Select the tab for the search type you want to search for. If none of the options on the dropdown list match what you are looking for then click more.



After a search type has been selected, input the criteria that matches your clients' needs then click results.



Once the results populate, go to the bottom of the page, save then, select New Auto Email. Keep in mind that the system will only allow you to make an auto email based on criteria if there are less than 400 results.



On the next page you will be making an auto email for your client. The yellow highlighted spaces are the required fields.

On this screen you will be able to select a contact, type out an email as well as enable reverse prospecting, save the search as a saved search and if needed set up a schedule for your clients.