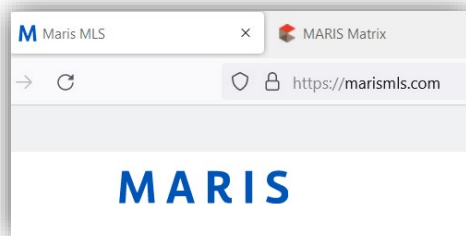


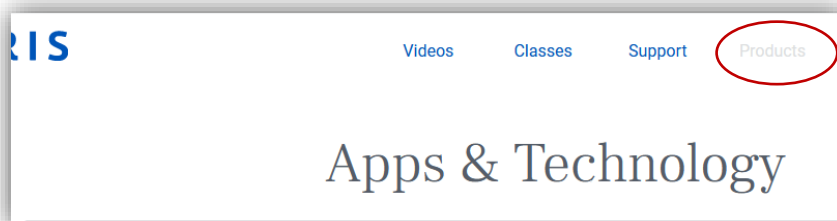
MARIS

Creating an Auto Email

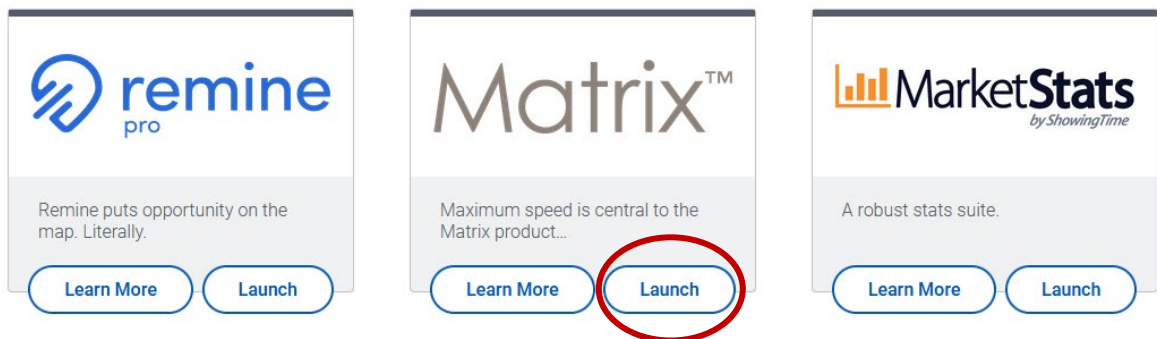
- Log in to **marismls.com**



- Select the **Products** Page



- Launch or Sign in to **Matrix**

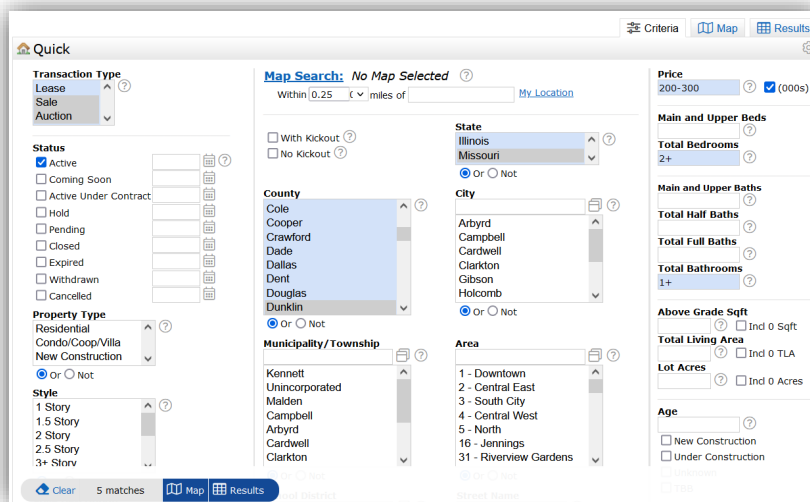


MARIS

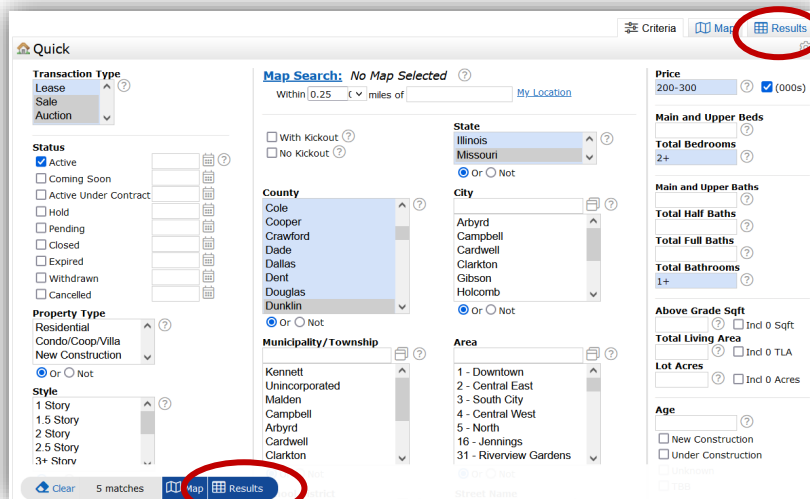
- When Matrix opens, click on the **Search** option across the top



- Fill in the **search criteria**

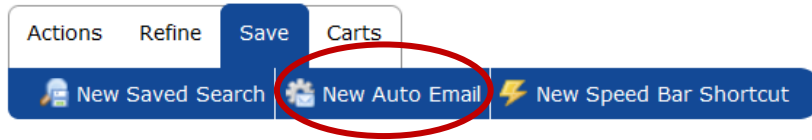


- When your criteria is entered, click on the **Results** button at the bottom left or top right of the screen.



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- On the results page, select **Save** in the actions at the bottom of the screen, then **New Auto Email**.



- Fill in the next page and Click Save to send.

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 "The Portal!"

All messages I send to you containing listing information, whether they have been sent manually or through an automated search that I have created for you, 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 MLS® 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

Signature: **Randi Marie Penny**
MARIS
Membership Services Specialist
(618) 343-3030
(314) 984-9111 x 238

[Edit Your Signature](#)

MARIS

Auto Email Page Explained:

1. **Recipient**, if the client has already been added to your contacts, select them from the pull-down list or add a new contact by clicking create new contact at the right side of the pull-down menu. After selecting/adding your contact, add any cc (carbon copy) email addresses and select if you would like to be BCCed (blind carbon copied) by checking the checkbox.
2. **Message** add the subject line that will show to your client and adjust the standard language for the welcome and recurring emails, if desired. Use the grey gear to default any changes.
3. **Criteria** shows the search criteria used for the auto email.
4. **Settings**
 1. **Enable concierge mode** allows the agent to approve all listings before sending them to the client. The agent can be notified via email when new results match their clients search and can be approved.
 2. **Show this contact in Reverse Prospect** allows the buyers agent (not the client) to be seen by list agents in the reverse prospecting tool.
 3. **Enable as a favorite search on Home tab** creates a my favorite search on the agents homescreen. 10 is the maximum number of favorite searches allowed.
 4. When you go to update this page when the auto email is live, **enable/disable** buttons will be added to the settings options.
5. **Schedule** select when the client will receive updates to their searches.
 1. **ASAP** will send within 10 minutes of the listing activation in Matrix. This could be aggressive if the client gets a lot of matches.
 2. **Daily** toggle between AM and PM and uncheck days of the week, as needed.
 3. **Monthly** sent on the first day of the month.
6. **Save or Save, go to approvals.**
 1. **Save** will automatically send the welcome email.
 2. **Save and go to approvals** is used in concierge mode. A screen will open with the full results list so the agent can pick/choose which to send. Once listings are approved the welcome email will be sent.