



# EMAILING

MATRIX USER GUIDE

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## How do I email a listing?

1. On your search results page, click the select box next to each listing you want to email. If you are on a Full Detail and only want to email that one, you do not need to click a select box.
2. Click the "Email" button at the bottom of the page.
3. If you have Contacts set-up in Matrix, you may select one for the email by clicking the "To:" button. Or you may type one or more email addresses in the "To:" field. You also have CC (Carbon Copy): field and a checkbox to send a separate copy (Blind Carbon Copy) to yourself. Also, fill in the Subject line for your email.
4. Type in a message for your recipient.
5. Click the "Send Email" button.

Your recipient will receive a link to a public Web page where they can view the listings. At the top of the Web page will be your name and preferred phone number.

## How do I set up an email signature?

1. Click the "My Matrix" tab, then click the "Settings" link
2. Click on the 'Email Signature' link underneath the My Information section.
3. Type in your email signature and click the "Save" button.

Your email signature is saved and will appear on every email you send through Matrix. You may go back and change it at any time. Also, on every email you send, you have the opportunity to change the signature just for that email.

## How do I set-up Prospect Autonotification (Auto-Email)?

### Prospect Autonotification

In Matrix, prospects are referred to as "Contacts" and Autonotification is referred to as "Auto-Email." To set-up Auto-Email, first you need to have one or more Contacts set up.

### Set Up Contacts

1. Click the "My Matrix" tab, then click the link "Contacts."
2. Click the "Add Contact" button.
3. Fill in all the information you want for the contact. The only required fields are First Name and Last Name. However, you must fill in an email address if you want to set-up this contact for auto-email. When you are finished, click the "Add" button. Now you are ready to set-up a Search.

## Save a Search and Enable Auto-Email:

1. Run a search and click the "Save" button at the bottom of the page. Click the "New Auto Email" button.
2. Click the Primary Email Contact drop down box to select the Contact you want to assign to this search.
3. Fill in the Subject for the new Auto Email.
4. If you want, you can choose BCC: field and click the select box to send yourself a separate copy.
5. In the settings section, you can choose to send the auto email in concierge mode, or save it as a favorite search on your Home tab.
6. Choose a schedule for sending the auto emails (ASAP, or Daily) by clicking the appropriate radial button.
7. Click the "Save" button. Matrix will immediately email the search results to your Contact. As new listings meet your search criteria, they will be automatically emailed to your Contact.

## How do I disable Auto Email?

### Disabling Auto Email

1. Click the "My Matrix" tab, then click the "Auto Emails" link at the top of the page.
2. Find the search you want to disable. Each Auto Email has the Contact's name listed. Expand the details for the Auto Email by clicking the triangle beside the name, or by clicking the name itself.
3. Click the "Settings" button, then scroll down to find the "Settings" sub-header.
4. Click the "Disabled" radio button, and then the "Save" button at the bottom of the page.
5. You will notice that the graphic in the Status column has now been changed to a red circle with an exclamation mark. Auto Email is now disabled. If there are other searches set-up for the same contact, you need to disable each one individually.

## I want to email a display that will print one listing per page

### Email a One Page Listing

1. Follow the steps to email a listing. For Display Type, select "Full."
2. When your recipient prints them, most should print to one page. There will be exceptions where there will be a second page, particularly if you email Sold listings or Actives where many data fields are maxed out. However, most Actives should stick to one page.

# Email History

1. Click on the "My Matrix" tab, then click on the "Sent Email" link at the top of the page.
2. You may filter between "Direct Emails" and "Auto Emails" by using the Filter drop down menu in the upper right corner.
3. Your emails are initially sorted by email type and then date in descending order. You may click any blue column header to sort the list by that field. Clicking the header a second time will sort the list in reverse order.
4. Detailed information for each Sent Email may be accessed by clicking the triangle next to the "Sent" time or the time link itself. Click the "Open in Portal" button to view the listing(s) as the recipient would in their Portal.
5. Expanding the details for an Auto Email will allow you to change the "Settings", "Revise" the criteria, run as a "Full Search", "Open in Portal" and even "Delete the Auto Email".
6. For Direct Emails you may click the "x Listings" link in the "Contents" column to view the listings that were sent in that emailing.
7. Clicking any blue Contact name in the "Recipients" column will bring you to a Filtered Contacts view of all interactions with that Contact. From here you may review Contact Details, Auto Emails, Saved Searches and Sent Email. Detailed information for each section can be accessed by clicking the triangle next to the section, or the section name itself.
8. The "Viewed" column will show you the last time an email was opened in the portal by the recipient.

When a sent email in your history section goes beyond 90 days old, Matrix will automatically drop it from your list.

## How does my Client opt back in if they accidentally unsubscribed to Matrix emails?

### Client Opt In for Matrix emails

If your client clicks the link the "**unsubscribe**" link at the bottom of an email sent from Matrix, it will disable their auto email search. There are two steps to re-enable their auto email:

1. Your client must send a blank email to [optin.okc@matrixemailer.com](mailto:optin.okc@matrixemailer.com) from the email address they used when they unsubscribed.  
*\*\*They do not have to fill in a subject line or type a message.\*\**
2. You must go to My Matrix, choose "**Auto Emails**". Click on the name of the auto email (*under Subject column*) or the corresponding downward-pointing arrow to open the full options; then click "**Settings**".
3. On the settings screen, under your message, change the auto email to "**Enabled**" and click save.

Your client should now be able to receive emails from Matrix.