

CRMLSMATRIX

Creating Auto Emails

Quick Reference Guide

The CRMLS Matrix Platform allows you to send your prospects and clients Auto Email with listings that match their criteria. Follow the steps below to create Auto Emails for your clients.

Step 1: Start a search in the CRMLS Matrix Platform. When you see the search results page, click the **Save As** button, then select **New Auto Email**.

<input type="checkbox"/>	110039700	A SFR/D	16885	Ridge Cliff	RVSD	252	744F5	\$524,900 ↓	5/5.00	2006	4,576	20,038
<input type="checkbox"/>	110081605	A SFR/A	17360	Mcallister ST	RVSD	252	745A5	\$525,000	3/2.00	1959	1,934	202,554
<input type="checkbox"/>	110051230	A SFR/A	14265	Laurel DR	RVSD	252	745C3	\$529,000	3/3.00	1985	2,000	8,276
<input type="checkbox"/>	110085553	A SFR/D	2521	Horace ST	RVSD	252	715H3	\$539,000 ↓	4/4.00	1973	3,236	21,780

Previous · Next · [1] 2 3 4 View Cart (31) · Add to · Empty

Revise Email Report CMA Map Stats Save As

New Saved Search
New Auto Email
New Speed Bar Shortcut

Status is 'Active'
Type is 'Single Family Residence'
Current Price is 500000 to 600000
Bedrooms is 3+
Baths Total is 2+

Step 2: Select an existing contact in the Contact drop-down menu or click **Create a New Contact**.

Step 3: Enter a Subject for the auto email.

Step 4: If you would like the system to notify listing agents when the system sends one of their listings to your client, click the **Make available for Reverse Prospecting** checkbox.

Step 5: Select the **Enable as a Favorite Search on Home Tab** checkbox to display this search on the Home tab of the CRMLS Matrix platform.

Step 6: Select Scheduling options for Auto Emails being sent to your client.

Step 7: Click **Save** to save your changes and to enable the Auto Email.

CRMLS MATRIX Home Search My Matrix Add/Edit Finance Roster Realtor

Summary Contacts Auto Emails Saved Searches Sent Email CMAs Watched Listings

Turn this Auto Email into a Saved Search

Settings for ""

Status: Unsaved

Contact: Lee, John [Create a New Contact](#)

CC:

BCC:

BCC me a copy of all emails

Subject:

Message:

Check Spelling [English](#)

Settings

Enabled
 Disabled

Make available for Reverse Prospecting
 Enable as a Favorite Search on Home tab (12 maximum)

Criteria: Status is 'Active'
Latitude, Longitude is around 34.20, -118.11, is around 34.16, -117.99, is around,
List Price Range is 800000 or less

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
All AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
All PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Clear](#)

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

[Cancel](#) [Save](#)