

Under **My Matrix** tab to **Contacts**, you have the ability to view and modify all items assigned to that Contact. Here you have access to Contact Details, Auto Emails, Saved Searches, CMAs and Sent Emails.

**Step 1:** Click the **Contacts** link in the My Matrix Tab. To expand a Contact click the **Contact's Name** or the **triangle** to the left of the Contact's name. You also have the option to filter or search for a particular contact.

Contacts 4

Search:  Filter Contacts: ... choose a filter

| Name                | Email                | My Last Use    | Last Portal Visit | Icons     |
|---------------------|----------------------|----------------|-------------------|-----------|
| Biggs Jeannette     | jeannette@imrmls.com | 0 0 6/23/2009  | never             | 0 0 0     |
| <b>Borgana Jane</b> | jane@imrmls.com      | 3 1 11/19/2009 | 12/1/2009         | 15 21 111 |
| Chan Jennifer       | jennifer@imrmls.com  | 0 0 never      |                   |           |

... choose a filter

- ... choose a filter
- with active auto emails
- with inactive auto emails
- who have visited their portal
- who have not visited their portal
- I haven't worked with
- who have saved searches
- who have no saved searches
- with no auto emails

**Step 2:** Click the triangle next to the Details, Auto Emails, Saved Searches, CMAs or Sent Email section you want to work with.

- **Details:** Allows you to view the Personal Home and Business Information for your contact.
- **Auto Emails:** Allows you to view and edit auto-email settings for your client.
- **Save Searches:** Allows you to view and edit previously saved searches.
- **CMAs:** Allows you to view, edit, and delete previously saved CMAs.
- **Sent Email:** Allows you to view Direct Email, Auto Email and CMAs along with its respective viewed history and content.

Borgana Jane jane@imrmls.com

- Details
- Auto Emails 3
- Subject
- Chino Hills
- new listings
- Temecula homes
- Saved Searches 1
- CMAs 2
- Sent Email 108

Edit Contact Delete Contact Start CMA Open Portal

To change any information in the **Details** of a contact, Click on **Edit Contact** at the bottom. You can also **Delete**, **Start CMA**, or **Open Portal** for your client or prospect.