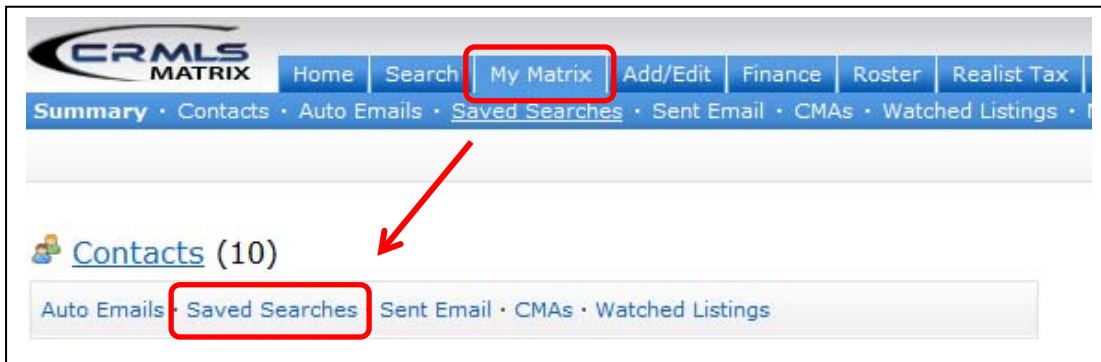

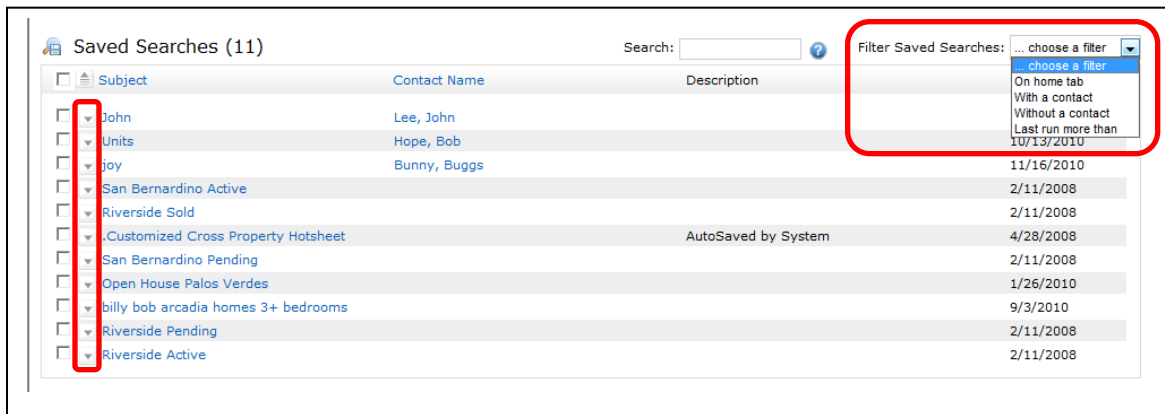


Saved Searches allows you to store search criteria for you clients in the CRMLS Matrix Platform. These saved searches can then be quickly turned into Auto Email notifications for your clients. The system will automatically send any updated listings to your clients through the Auto –Email notification system.

Step 1: Click the **My Matrix** tab and select the **Saved Searches** link under Contacts.



Step 2: Locate the Saved Search you want to turn into an Auto Email notification and click the  triangle to expand the saved search options.



Tip:

You can filter your Saved Searches using the **Filter Saved Searches** drop-down menu at the top right side of the Saved Search page.

Step 3: Click **Settings**.

Search: Filter Saved Searches: ... choose a filter

Subject	Contact Name	Description	My Last Run
John	Lee, John		10/6/2010

Settings Revise Full Search Date Since Market Update Delete

Status is 'Active'
Type is 'Single Family Residence'
Current Price is 1000000 to 5000000
Area is '605 - Arcadia'
Ordered by Status, Area, Selling Price, List Price

Step 4: Click **Turn this Saved Search into an Auto Email**.

[Turn this Saved Search into an Auto Email](#)

Settings for 'John'

Search Name: John

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

Criteria: Status is 'Active'
Type is 'Single Family Residence'
Current Price is 1000000 to 5000000
Area is '605 - Arcadia'

Enable as Favorite Search on Home tab (12 maximum)

Tip:
You can also display this search on the Home tab in the CRMLS Matrix platform by clicking the **Enable as Favorite Search on Home tab** checkbox.

Step 5:

1. Select an existing contact in the Contact drop-down menu or click **Create a New Contact**.
2. Enter a Subject for the auto email.
3. 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.
4. Select Scheduling options for Auto Emails being sent to your client.
5. Click **Save** to save your changes and to enable the Auto Email.

CRMLS MATRIX Home Search My Matrix Add/Edit Finance Roster Realist T
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
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

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

Step 6: The Auto Email has been created for your client. [Click here](#) for a Quick Reference Guide on managing Auto- Email Notifications.

CRMLS MATRIX Home Search My Matrix Add/Edit Finance Roster Realist Tax Links Help Logout
Summary Contacts Auto Emails Saved Searches Sent Email CMAs Watched Listings My Listings Settings Message Center Welcome Jennifer Chan

Updated auto email 'new home'.

Saved Searches (9) Search: Filter Saved Searches: choose a filter

Subject	Contact Name	Description	My Last Run
<input type="checkbox"/> .Customized Cross Property Hotsheet		AutoSaved by System	4/28/2008
<input type="checkbox"/> billy bob arcadia homes 3+ bedrooms			9/3/2010
<input type="checkbox"/> Open House Palos Verdes			1/26/2010
<input type="checkbox"/> Riverside Active			2/11/2008
<input type="checkbox"/> Riverside Pending			2/11/2008
<input type="checkbox"/> Riverside Sold			2/11/2008
<input type="checkbox"/> San Bernardino Active			2/11/2008
<input type="checkbox"/> San Bernardino Pending			2/11/2008
<input type="checkbox"/> Units	Hope, Bob		10/13/2010