

Welcome to Matrix!

We know changing to a new system is never easy. To make the transition smoother, we have put together information on **Auto-Emails** and some “**To Dos**” to get you setup and running.

Auto-Emails

Since emails are already being sent from InnoVia, Auto-Emails are not being sent from Matrix until you activate them. Your Auto-Emails have been imported as **Saved Searches** but will need to be manually activated. Any search that was used for an auto-email will have a plus sign at the beginning of the name (+**Imported**).

We recommend you take the following steps before enabling your auto-emails:




- Read through the **Portal Quick Start Guide** (hyperlink below). This document is for your customer, but make sure you are familiar with it. This will allow you to understand how the **Portal** experience works for your customers and answer any questions they may have.
<https://www.corelogic.com/downloadable-docs/realestatesolutions-matrix-client-portal-brochure-0917.pdf>
- Tell your customers the MLS system is changing so they will be aware of the change in the look and feel of the information they will receive. Tell them to whitelist/allow emails from the new URL of the system (<https://mfr.mlsmatrix.com>). Include the link to the **Portal Quick Start Guide** above. This will help them understand the changes.
- Personalize your **Portal Information**. Build it out so your customers have a pleasant experience and it has your personal branding on it.
- Configure your **Header/Footer** options. There are several **Header** options provided by the system so you can quickly and easily brand your **Customer Portal** site.
- Configure your **Email Signature**. This will enable your customers to see the information is coming from you along with your contact information.
- Customize your **Welcome Letter** that is sent when your auto-emails are activated.

To Do: Enable Auto-Emails

Follow the steps below to setup auto-emails for your customers and clients.

- Click on **My Matrix, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the link at the top that says **Turn this Saved Search into an Auto Email**.
- Edit the information for the Auto-Email.
- Click on **Save**.

Once an Auto-Email is setup, the email will be sent to your customer. The status of your Auto-Email will be one of the following:

-  Auto Email is Active, but the Contact has not yet logged in and activated their portal.
-  Auto Email is Active and has been accessed by the Client.
-  Auto Email is disabled by client or agent.

A customer can unsubscribe from just one email, from all emails from one agent, or from all emails from the MLS. If your customer is not receiving an email, make sure they did not unsubscribe from your emails or from the MLS emails.

Please note: If an auto-email has been setup and it returns zero listings for 90 days, it will be disabled by the system. Also, if an auto-email is not opened by your client, it will be disabled after 30 days.