



**Auto-Emails:** Since emails are already being sent from **your current Matrix MLS system**, Auto-Emails are not being sent from SmartMLS until you activate them. Your Auto-Emails have been imported into SmartMLS as Saved Searches, the imported saved searches 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 Bob's 3 BR Condos**). If there is no plus sign in front of the search, then it was just a saved search and it does not need to be activated.

With conversions, every effort is made to convert the complete saved searches. However, fields change or are removed and it's not possible to convert 100% of a saved search. **If this is the case, an asterisk (\*) will follow the name of the search (+Imported Bob's 3 BR Condos\*).** The asterisk means your saved search is incomplete.

Open the saved search in the old system and the new system and check the criteria to find the difference. Edit the criteria in SmartMLS Matrix as needed to make it fit your client's needs.

Also, criteria with saved searches may not be on the search screen by default. If this is the case, any field in a saved search will appear below the main search screen under Additional Fields – Add/Remove.

It is recommended for you to do the following before enabling any auto-emails:

- 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. The Header appears on your Portal and provides you to brand the 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 auto-emails are activated.
- 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 see and receive. Tell them to whitelist/allow emails from the new URL of the system (<http://smartmls.mlsmatrix.com>).

**When you turn on an Auto-Email in Matrix, you should turn it off in your old system so your customer does not receive two emails from you.** This will reduce confusion as to which email they should be reading.




**To Do: Enable Auto-Emails** – Follow the steps below to setup auto-email for your customers and clients.

- Make sure you have reviewed your **Contacts** as indicated previously.
- Make sure you have reviewed your **Saved Searches** as indicated previously.
- Make sure you have set up your **Email Signature** as indicated previously.
- 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.
  - If you choose Daily as the option for sending, there is an AM and a PM option. The AM emails are sent at 6:00 a.m. The PM emails are sent at 6:00 p.m.
- Click on **Save**.

Note: A maximum of 250 records are returned with a search associated with Auto-Emails. Please make sure the Saved Searches that are enabled do not return more than 250 listings. If the search returns over 250 listings, you will be prompted to edit the Saved Search.

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.

If an auto-email has been setup and it returns zero listings for 80 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.

---

## SmartMLS Setup Checklist:

- Did you setup your NEW Portal?
  - My Matrix
  - My Information
  - Header & Footer
  - CMA Cover Sheet
  - Email Signature
- Portal Profile
  - Upload your photo
  - Enter a Portal Greeting
  - Include a Video
  - Check your Contact information
- Did you setup your Portal Notification Settings
  - How do you want to be notified of activity by your clients in their portal?
  - Email, Text or Daily Summary Email