

Matrix continues to receive enhancements and updates! Many of the new features in this release have been requested by brokers, including:

- Visibility to the default auto email text used for both the Welcome Email and recurring auto email updates, as well as the ability to edit this text.
- The ability to change the salutation in the Client Portal for each contact.
- Remembering your BCC and concierge alert email preferences.
- Quick access to edit your listings from the My Listings menus under My Matrix→My Listings.
- Ability to add a My Active Listings link to your Client Portal welcome tab.

Auto Email Settings

- When saving a new auto email, you now have the ability to view and edit both the Welcome Email and Recurring Email default text for Auto Emails. This allows you to take advantage of default text provided by Matrix, while more easily customizing your messages.
- You can also enter a message for the Welcome Email that is different from the Recurring Email messages.
- Click the gear while on the Welcome Email or Recurring Email tab to set the current message as your default, or to reset to the default text.

Message

Subject: Jane's Auto Email

Welcome Email Recurring Email

Salutation: Hi Jane, I'm really excited to work with you! [Edit](#)

Message: One or more new/updated listing(s) match your search criteria:

Check Spelling [English](#)

Signature: Thanks!

Set current message as my default Recurring Email text
Reset to the system default text

Considerations:

- Custom text entered in existing auto emails will not be affected by this enhancement.
- The links to view the listings in the portal and to view the client portal video will always be included in the Welcome Email and the Recurring Emails.

Customize Salutation per Client

When you add or edit a contact, you'll now have the option to customize the salutation that is used within the Client Portal as well as in Auto Emails.

Personal Information Enable Reverse Prospecting

Title: Category:

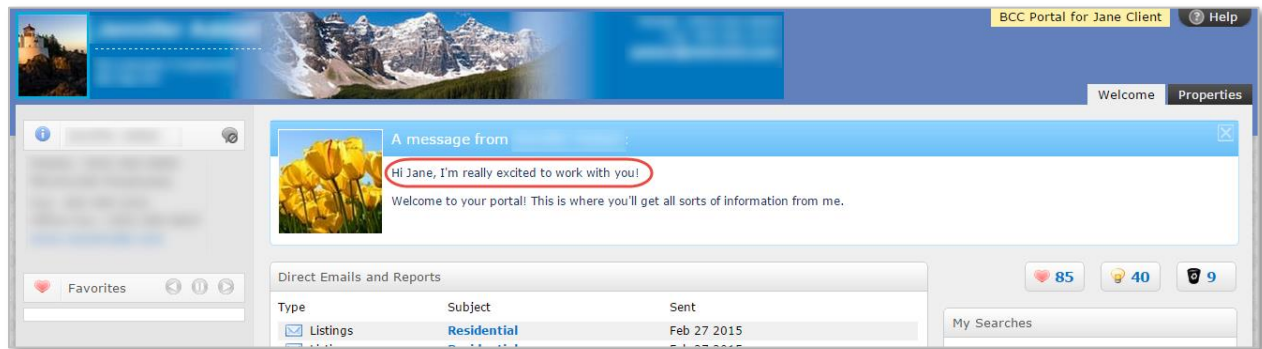
First Name: Last Name:

Email Address:

Salutation:

- Hi Jane,
- Hi Jane.
- Hello Jane,
- Dear Jane,
- Dear Jane Client,
- Enter a Custom Salutation -

Phone:



You'll also be able to edit the salutation by clicking **Edit** from the Auto Email settings.

Message

Subject:

Welcome Email Recurring Email

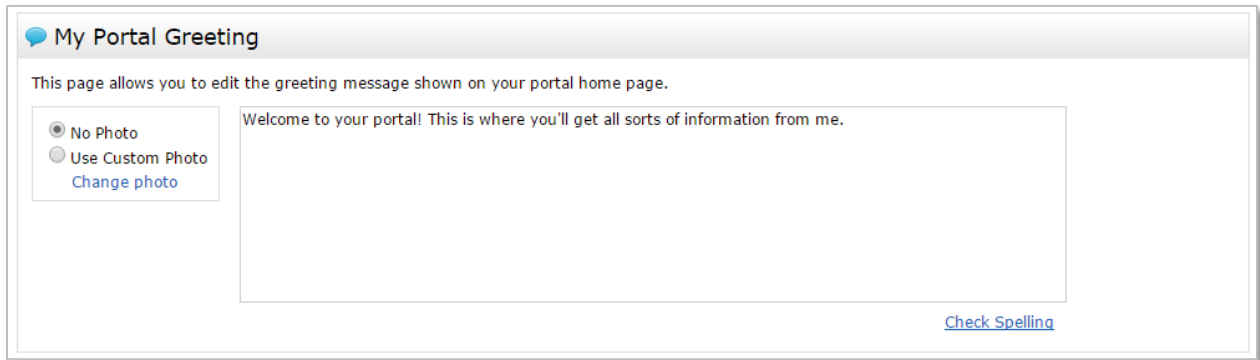
Salutation:

Message:

Check Spelling [English](#)

Signature: Thanks!

The Portal Greeting (My Matrix→Portal Greeting) no longer includes the salutation setting, but still allows you to add text that will be visible on all of your client portals.

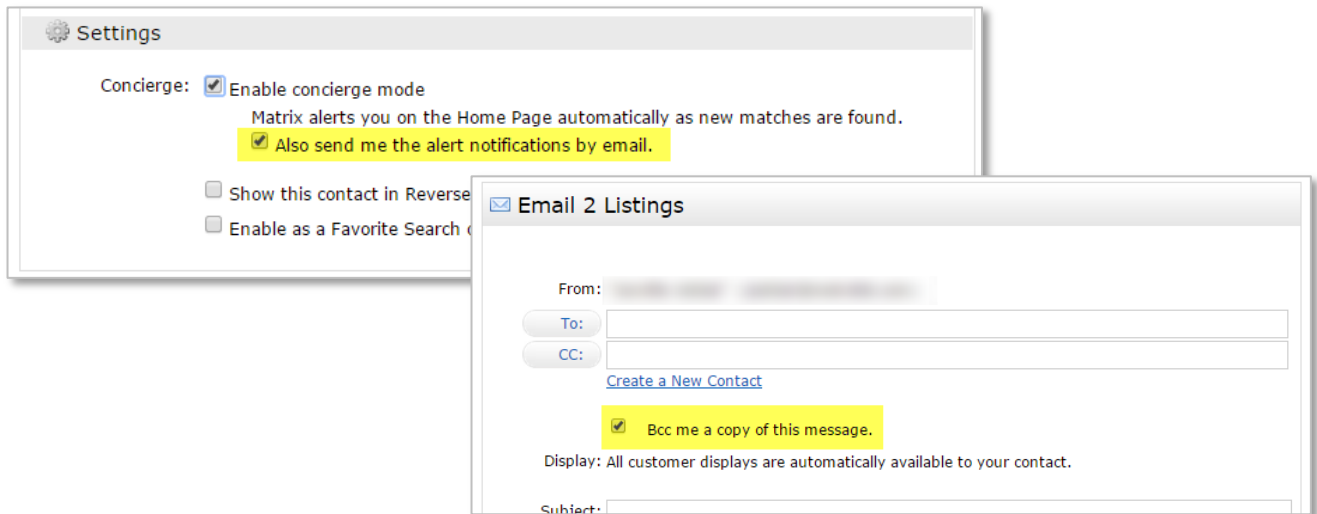


Considerations:

- The custom salutation is not used when sending a direct email to a contact.
- When adding new clients, the default salutation is “Hi Jane”.
- The salutation you previously selected on the Portal Greeting page will automatically be applied to existing clients.

Email Settings

When sending a direct email or setting up a new auto email, your selection for “BCC me a copy of this message” and the Concierge setting “Also send me the alert notifications by email” will be remembered for your next direct or auto email.



Quick Access to Edit Your Listings

You now have a quick way to edit your listings. When in the My Matrix→My Listings menus, you’ll now have options to edit your listings, manage photos, or manage supplements.

Select one of these options from the “Show” dropdown to see these new links:

- My Active Listings
- My U/C Listings
- My Expiring Listings (14 day)
- My Incoming Listings

Managing Brokers, Participants, and Office Admins will also see the links on:

- My Office Active Listings
- My Office Expiring Listings (14 days)
- My Office U/C Listings

RECOLORADO Home Search Stats My Matrix Realist Tax RPR Deed Search Finance Links Input Ma

Concierge Alert! 1 auto email, 149 listings.

My Listings (24)

Show My Office Active Listings or -- MLS # -- [Click here to run this as a Full Search](#)

Previous · Next · 21-24 of 24 · Checked 1 · All · None · Page

	MLS #	St	P Type	Address	City	Zip	Price	Beds	Baths	Total S
<input checked="" type="checkbox"/>	4722653	A	RES	6488 S Yosemite St	Denver	80111	\$158,000	2	2	1,200
<input type="checkbox"/>	9657418	A	RES	6500 E Lowry Blvd	Denver	80220	\$432,500		0	
<input type="checkbox"/>	6504647	A	RES	6552 Leon Young Dr #350, Bldg	Colorado Springs	80924	\$2,500	5	4	4,648
<input type="checkbox"/>	9838761	A	RES	789 S Hudson St	Denver	80246	\$250,000	3	11	3,000

Edit Manage Photos/Logos Manage Supplements Share Reverse Prospect Print

My Active Listings Link in Client Portal

You'll now have the option to add a link in your Client Portals to view your active listings (Broker Associates) or your office's active listings (Managing Brokers or Participants).

Direct Emails and Reports

You have not yet received any direct emails or reports.

Recent Notes

No listings in your portal have notes.

View My Active Listings
View My Office Active Listings

8528 Winter Berry Dr

No Picture Available

MLS#: 6532501
Status: Expired
\$425,000
3 74

To add the link(s), go to **My Matrix, My Information**, and then **Portal Information**. Click the **My Active Listings** or **My Office Active Listings** checkboxes to have the link(s) added to your Client Portals.

- Brokers have the ability to add the My Active Listings link.
- Managing Brokers and Participants also have the option to add the My Office Active Listings link.

This page allows you to manage the information that you wish to display on your Portal welcome page. Use the drop-downs below to select which information should be shown. (You can edit the information on the Information tab.)

My Active Listings

Include links to your current listing inventory

My Active Listings

Reset to Defaults Save

This page allows you to manage the information that you wish to display on your Portal welcome page. Use the drop-downs below to select which information should be shown. (You can edit the information on the Information tab.)

Broker/Owner

Include links to your current listing inventory

My Active Listings
 My Office Active Listings

Reset to Defaults Save

Improvements to Print Menu

- The Print menu will now list the displays and reports that you print most often, allowing you to more easily view and select these options.
 - You'll initially see all displays and reports until Matrix has learned your printing preferences.
 - The display that had been selected on the search results will always be listed and selected, even if it is not one of your commonly-printed displays.
- The other displays and reports can be accessed by clicking more from the Print menu.

Print 1 Listing

Print which format(s)? To select multiple at once, hold Ctrl while you click (option key, on a Mac).

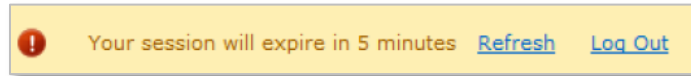
Full
Single Line
Thumbnail
----- Reports below print as PDF only -----
Quick CMA (CMA 1 Line)
1004MC Summary
----- More (click) -----

Print agent header & footer
 Print with roll-outs (if any) open
 Print search criteria
 Ink saver; if any, don't print images

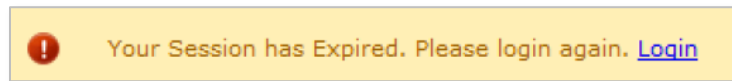
Back to Results Email PDF Print to PDF Preview Print

Timeout Message

- When your Matrix session is about to end, you'll now see a new message letting you know and allowing you to refresh your session if you are still working, or log out if you're no longer working.



- If your Matrix session has ended, you'll now see a message letting you know and allowing you to log back in. This makes it more clear that your session has ended.



- Considerations:
 - When you click Login from the "session expired" message, you'll be sent to the normal CONNECT login page.
 - This has no effect on your CONNECT session length, which is independent of your Matrix session.

Other Items

- When viewing a search created by a contact under My Matrix → Contacts → Contact Name → Portal Searches, it is no longer possible for you to modify the client's search criteria. The criteria tab will now be greyed out to prevent you from accidentally changing your client's saved search criteria.
- In Stats, the "List Price by SqFt Ratio" has been renamed to "PSF Total, Average" to reflect what the statistic actually calculates. Note that for listings in any status other than Sold, the List Price is used. For Sold status listings, the Sold Price is used.