



OREB | Matrix: Auto-Email Activation

Ottawa Real Estate Board | 1826 Woodward Drive, Ottawa ON, K2C 0P7 | 613-225-2240

Please find below important information regarding the auto-email activation process and explanations as to why this is a MANUAL process and not automatically done on your behalf:

Duplicate Email Notifications to the Consumer

Clients would receive emails from two systems causing confusion as most clients don't know that your Board is changing systems. Clients may think that the new Matrix notifications are spam because they are used to receiving emails from the old system. A consumer may opt-out not understanding that the email stems from the fact the agent is A) rebuilding his/her business base on the new platform and B) has not notified the client of the transition. Aside from confusion this has the potential to make the agent look unprofessional.

Saved Search Conversion not 100%

Saved Searches are not converted with 100% accuracy. Some fields are added, removed, merged, or modified causing some information to be out of sync. All Saved Searches that were brought in from MLXchange/Fusion to Matrix are labeled with **(Imported)** to make it easy to identify the searches that came from one system to the other. Every search beginning with **(Imported)** should be carefully reviewed to ensure the criteria is correct and then activated in Matrix. You will then want to return to MLXchange and delete the Saved Search so that your client does not continue to receive notifications from both.

WARNING: Do not delete the client in MLXchange, only the Saved Search. There is still a data transfer process that occurs between the clients in both systems.

Search Limits

Search Limits are set at 500. What this means is that if you have a search set-up in MLXchange/Fusion that has been carried over to Matrix and has more than 500 property matches that currently meet their criteria of your client, you will need to narrow down the search so that the results are 500 or less. MLXchange/Fusion had a limit of 1,000.

Auto-Email Limits

There is a 500 active auto-email limit for each agent. This limit is set so that the system is not labeled as a spam tool.

Member Has Not Used Matrix Yet

There are many tasks associated with auto-email that you should complete before you proceed to enable the auto-email notifications in Matrix.

- Read through the **Portal Quick Start Guide** (hyperlink below). This document is for your customer, but make sure you familiarize yourself with it as well. This will allow you to understand how the Portal experience works for your customers and answer any questions they may have.
<http://www.marketlinx.com/download/pdf/Portal%20Quick%20Start%20Guide%20CAN.pdf>
- Tell your clients the MLS® System is changing so they aren't surprised when they get a new notification e-mail. Tell them to whitelist/allow emails from the new URL of the system – postmaster@matrixemailer.com. Include the link to the **Portal Quick Start Guide** (above). This will help them understand the changes and features of the Portal.
- Personalize your Portal Information. Build it out so that your clients have a pleasant experience and it has your personal branding on it.



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- 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 clients 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.
- If you have a vanity website/domain name pointing to your old system's portal, configure it to point to the new system. See the Agent Web Pages and Vanity Websites section below on how to do it.

You need to be familiar with Matrix and setup all of these items to make the Portal experience positive for your clients.

Activation and Welcome Letter

When an auto-email is activated in Matrix, a Welcome e-mail is sent to the consumer. The client **MUST** click on the activation link within the auto e-mail in order to receive ANY property matches. If they do not do this, they will not receive any property matches until they do. When you activate the search in Matrix, you should call your client to ensure that they received the e-mail (and that they did not delete it in error) and that they understand how to view properties moving forward. You should familiarize yourselves with this process. This process cannot be bypassed due to anti-spam legislation.

Agent Web Page Configuration

As mentioned in the last item, you may have a vanity website. This should be configured before you switch to the auto-emails in Matrix. This will allow you to maintain personal branding with your customer.