MATRIX

Auto Email Configuration

June 2018

Overview

The Auto Email architecture has been updated to produce a more modern look with access to key features. With a few additional configurations applied you'll be able to take advantage of these improvements and tailor these emails to fit your needs.

Figure 1: Sample Email

1

2 Hello Lucy,

3 We've found new or updated listings for you!

4 $800,000
100 First St, Greenville, CA 98765
5 bed, 3 bath | 2340 sqft. sqft.
Active

More Details

5 **View All Listings**

6 Did a little digging and found this gem for you.

7 John Silver
Seasoned Realtors Group
(888) 555-1212

8 Delivered By CoreLogic, Inc. | 40 Pacifica, Irvine, CA 92648
Click this link if you wish to Unsubscribe. **9**

10 Copyright © 2019 CoreLogic. All Rights Reserved.

The Auto Email is comprised of various components configurable through Matrix.

1) Email Wrapper – Provides outer border and padding to email messages.
2) Salutation – The agent's preferred greeting. Example "Hello Mr. Smith".
3) Message – Preset messaging for each auto email type.
4) Display Template – The listing details template built in the Display Editor.
5) View All Listings – Link to view the full listing results on the agent's profile website.
6) Publish Comments – Additional comments added by the agent.
7) Agent's email signature block.
8) MLS footnote.
9) Unsubscribe link.

10) CoreLogic's copyright statement.

Configuration

Listing Photo

The listing photos delivered via email must be configured for a suitable size and lifecycle.

1. Go to Admin, Control Panel, Advanced Settings, Media Images
2. Select "Photo" for Media type
3. Select a Media size. Should be between 280px and 300px
4. Select "Valid as non-expiry"
5. Note the media's Type ID and Size ID for use in a formula later.

MLS Footnote

This is where you could insert the name of your organization as well as any contact information.

1. Go to Admin, Control Panel, Manage Application Strings
2. If you know this field's ML ID search with that. Otherwise, search by text "Delivered by" (case sensitive). The correct field will be found in the object:
   Setup.MatrixSettings, Components.MatrixMail.HTMLMessageMaker
3. Update with appropriate message.

Unsubscribe

The text shown for the link to the email unsubscribe feature.

1. Go to Admin, Control Panel, Manage Application Strings
2. If you know this field's ML ID search with that. Otherwise, search by text "Unsubscribe" (case sensitive). The correct field will be found in the object:
   Setup.MatrixSettings, Components.MatrixMail.HTMLMessageMaker
3. Update with appropriate message.

Email Body

Each email type (New, Active, Concierge, etc.) has its own email body. The content and markup for each can be modified and we've provided a reset option that loads the original message body. Follow HTML Email best practices and thoroughly test across common email clients (Desktop, Web, and Mobile).

1. Go to Admin, Control Panel, Advanced Settings, Email – Text Auto Email.
2. Select the appropriate message type and select Edit.

Markup snippets for the Active message body is found in the appendix as well as an empty wrapper. When modifying within the editor make sure there are no line-breaks as this editor will interpret that as carriage returns that may break the markup.

Display template

An updated display template has been provided with a modern look as well as taking advantage of some mobile-responsive features. A template and formulas can be found in the appendix.

Appendix

Active Email Body

This markup must be minified for use in Matrix.

```
<table class="mtx-wrapper mtx-stacked" width="600" style="border: 10px solid
#f5f5f5;" border="0" cellpadding="0"
    cellspacing="0">
    <tr>
        <td>
            <table border="0" cellpadding="0" cellspacing="0">
                <tr>
                    <td valign="top" style="padding-left:20px; padding-right: 20px;
padding-bottom: 20px;">
                        <p>[Salutation]</p>
                        <p>[Message]</p>
                    </td>
                </tr>
                <tr>
                    <td>[DisplayContent]</td>
                </tr>
                <tr>
                    <td valign="top" style="padding-left:20px; padding-right: 20px;
padding-bottom: 20px;">
                        <table border="2" bgcolor="#ffffff" align="center"
cellpadding="0" cellspacing="0
                               bordercolor="#007faa"
                               style="border-color:#007faa; border-width:2px; border-
collapse: collapse; border-radius: 0px; mso-table-lspace: 0pt; mso-table-rspace:
0pt;">
                            <tr>
                                <td valign="middle"
                                    style="padding: 12px 26px; color: #007faa
!important; font-size: 16px; font-weight: 400; mso-line-height-rule: exactly;">
                                    <a title="See Details" href="[FullListingsLink]"
target="_self"
                                       style="letter-spacing: normal; line-height:
100%; text-align: center; text-decoration: none; color: #007faa !important; mso-
line-height-rule: exactly; display: block;">
                                        <font color="#007faa">View All
Listings</font>
                                    </a></td>
                            </tr>
                        </table>
                    </td>
                </tr>
```

```
            <tr>
                <td valign="top" style="padding-left:20px; padding-right: 20px;
padding-bottom: 20px;">
                    [(IsEmpty({PublishComments}) ? "" : "" &
{PublishComments})]</td>
            </tr>
            <tr>
                <td valign="top" style="padding-left:20px; padding-right: 20px;
padding-bottom: 20px;">
                    [AgentEmailSignature]
                </td>
            </tr>
        </table>
    </td>
</tr>
</table>
```

Empty Email Wrapper

This markup must be minified for use in Matrix.

```
<table class="mtx-wrapper mtx-stacked" width="600" style="border: 10px solid
#f5f5f5;" border="0" cellpadding="0"
    cellspacing="0">
    <tr>
        <td>
            <table border="0" cellpadding="0" cellspacing="0">
                <tr>
                    <td valign="top" style="padding-left:20px; padding-right: 20px;
padding-bottom: 20px;">

<!-- body -->

                    </td>
                </tr>
            </table>
        </td>
    </tr>
</table>
```

Display template

```
<table class="mtx-stacked table d-table" style="width: 100%;" class_value="table d-
table" j_controltype="Table"
    j_responsive="false" j_condense="0" j_hover="false" j_borders="false"
j_striping="false" j_rowheader="false"
    j_header="false" j_caption="false" j_cols="4" j_rows="1">
    <tbody>
        <tr>
            <td width="20" class="mtx-stacked" j_contentcontainer="1">
            </td>
            <td class="mtx-stacked" valign="top" style="width: 280px; padding-
bottom: 20px;" j_contentcontainer="1">
                <!-- Formula: Listing Photo -->
            </td>
            <td width="20" class="mtx-stacked" j_contentcontainer="1">
            </td>
```

```html
            <td class="mtx-stacked" valign="top"
                style="width: 260px; padding-right: 10px; padding-bottom: 20px;
padding-left: 10px;"
                j_contentcontainer="1">
                <table class="table d-table" class_value="table d-table"
j_controltype="Table" j_responsive="false"
                    j_condense="0" j_hover="false" j_borders="false"
j_striping="false" j_rowheader="false"
                    j_header="false" j_caption="false" j_cols="1" j_rows="5">
                <tbody>
                    <tr>
                        <td j_contentcontainer="1">
                            <!-- Formula: List Price -->
                        </td>
                    </tr>
                    <tr>
                        <td j_contentcontainer="1">
                            <!-- Formula: Listing Address -->
                        </td>
                    </tr>
                    <tr>
                        <td j_contentcontainer="1">
                            <!-- Formula: Listing Details -->
                        </td>
                    </tr>
                    <tr>
                        <td j_contentcontainer="1">
                            <!-- Formula: Listing Status -->
                        </td>
                    </tr>
                    <tr>
                        <td j_contentcontainer="1">
                            <!-- Formula: More Detail Button -->
                        </td>
                    </tr>
                </tbody>
                </table>
            </td>
        </tr>
    </tbody>
</table>
```

Formulas

Listing Photo

```
"<img class=\"mtx-stacked\" style=\"width:280px; height: auto; outline: none;\"
src=\"" & BuildMediaURL(1,0,2) & "\"></img>"
```

List Price

```
"<span style='font-size:1.5em;'>" & ToString( {ListPrice}, "$#,0" ) & "</span>"
```

Listing Address

```
((ToString({StreetNumber})="0")?(""):(ToString({StreetNumber}))) & " " &
((!IsEmpty({StreetDirPrefix}))?(ProperCase({StreetDirPrefix})& " "):("")) &
ProperCase({StreetName}) & ((!IsEmpty( {StreetSuffix} ))?("
"&ProperCase({StreetSuffix})):("")) & ((!IsEmpty( {StreetDirSuffix} ))?(" " &
ProperCase({StreetDirSuffix})) :("")) &((!IsEmpty({UnitNumber} ))?("
Unit#"&ToString({UnitNumber})):("")) & ", " & ToString({City}) & ",
"&ToString({PostalCode})
```

Listing Details

```
ToString( {BedsTotal} ) & " beds, "
& ToString( {BathsTotal} ) & " baths | "
& ToString( {SqFtTotal}, "#,0" ) & " sqft."
```

Listing Status

```
"<span style='font-size:0.8em; font-weight:bold;'>" & ToString( {Status} ) &
"</span>"
```

"More Details" Button

```
"<table class='table d-table mtx-cursor' class_value='table d-table'
j_controltype='Table' j_rows='1' j_cols='1' j_caption='false' j_header='false'
j_rowheader='false' j_striping='false' j_borders='false' j_hover='false'
j_condense='0' j_responsive='false'><tbody><tr><td j_contentcontainer='1'
style='background-color: #007faa; padding-top:6px; padding-bottom:6px; padding-
left:12px; padding-right:12px;'><a style='display:block; text-decoration: none;
color: #007faa !important;' href='"
& BuildFullTemplateUrl( )
& "'><font color='#ffffff'>More Details</font></a></td></tr></tbody></table>"
```