15 Ways to Use Auto Emails Effectively
Matrix Edition

#1 How the Heavy Hitters Operate

Pricing + pace intel

Save searches for areas where a top agent is active so you can do passive market research. Watch how they price, photograph, and describe homes so newer agents can “apprentice” via email alerts.

Matrix setup steps:

1. Go to Search > choose your property type (e.g., Residential).
2. Enter your area criteria (city, zip, subdivision, or draw a map polygon) and whatever statuses you want like Coming Soon, Under Contract, etc.
3. Scroll down to Representation and look for the Listing Agent field.
4. Enter the agent's name.
5. Click Results to confirm your search works.
6. Click Save > New Auto Email. Assign yourself as the contact.
7. Set Schedule to ASAP or Daily. Click Save.

#2 The Stale Listing

Motivation signal

If you set up an auto email to look for listings that hit a key band of Days on Market like 60 or 90 when a price decrease has happened, you can find sellers that are often more negotiable.

Matrix setup steps:

1. Click on Price Decrease on the Market Watch gadget on your dashboard.
2. Enter your target area (zip, city, subdivision, or map polygon).
3. Set your price range in the Current Price fields and whatever other fields you need like bedrooms, bathrooms, etc.
4. Add the ADOM (Agent Days on Market) field by clicking on the gear (Customize Search Fields) in the upper left. It will appear at the bottom of the list. Enter 60+ (or 90, 120, etc.) in the minimum.
5. Click Results to verify, then Save > New Auto Email.
6. Set Schedule to ASAP and set yourself up as a contact. This catches listings that cross the DOM threshold with a price decrease.

#3 'Not-Ready Buyer' Trigger

Perfect reason to call

Stop 'checking in'. Call your client with a specific match, the one they said they would move for. It accelerates timelines for buyers tired of open houses who have found the right home.

Matrix setup steps:

1. Go to Search > Residential.
2. Set very specific criteria: exact subdivision or small map polygon, beds, baths, price range, garage, etc.
3. Set Status to Active.
4. Click Results to verify a manageable result count.
5. Click Save > New Auto Email.
6. Select or create your buyer as a Contact.
7. Set Schedule to ASAP so they get notified within minutes of a new listing.
8. Optional: Enable Concierge Mode to review listings before they reach the client. Concierge Mode lets you add a personal not like 'This is the one you said you'd move for' before it reaches the buyer.
9. Click Save.

#4 Seller in Their Own Neighborhood

Competitive reality feed

This removes the information gap – show, don't tell. Pricing conversations get easier because they are seeing the same market you are.

Matrix setup steps:

1. Go to Search > Residential.
2. Enter the seller's subdivision name OR use Map Search to draw a radius around their address. Map Search is up at the top under Location on the Criteria tab.
3. Set Status to Active, Under Contract, Pending, Coming Soon (include all statuses you want them to see).
4. Click Results to verify, then Save > New Auto Email.
5. Create the seller as a Contact (use their personal email).
6. Set Schedule to Daily or ASAP depending on seller's preference.
7. Click Save.

#5 Back-on-Market Watch

Second-chance inventory

Get notified the moment a deal falls through, allowing your client to be the first backup offer.

Matrix setup steps:

1. Click on Back on Market on the Market Watch gadget on your dashboard.
2. Enter your target area (zip, city, subdivision, or map polygon).
3. Set your price range in the Current Price fields and add whatever other fields you need like bedrooms, bathrooms, etc.
4. Click Results to verify, then Save > New Auto Email.
5. Create the seller as a Contact (use their personal email).
6. Set Schedule to ASAP and set yourself up as a contact.
7. Click Save.

#6 Foreclosure / REO / Auction Flags

Investor deal flow

Investors want consistent deal flow. If you deliver it first, you become their source – not just their paperwork helper.

Matrix setup steps:

1. Go to Search > Residential.
2. Enter target zip codes in the location fields.
3. Click Add under Additional Fields and look for a field called Special Listing Conditions.
5. Select the relevant values (REO, Short Sale, Auction, Bank Owned, etc.).
6. Click Results, then Save > New Auto Email.
7. Set Schedule to ASAP for investor clients. Click Save.

#7 Farm Area Auto Email

Never be caught off-guard

Always know what's happening on the street before the homeowner brings it up. When a neighbor asks, 'what's the market like?', you already have the answer.

Matrix setup steps:

1. Go to Search > Residential.
2. Click Map Search. Use the Polygon drawing tool to draw your farm area boundary. Or enter your subdivision/zip code.
3. Set Status to include Active, Under Contract, Pending, Sold/Closed—check every status you want to track.
4. Click Results to verify the count is manageable (under 250 current matches for Auto Email to work).
5. Click Save > New Auto Email.
6. Set yourself as the Contact.
7. Set Schedule to Daily (AM recommended so you start each day informed).
8. Click Save.

#8 Past Clients on Their Street

Passive equity awareness

Set up past clients with their permission who bought 4-5 years ago. It quietly triggers equity curiosity – when a neighbor lists high, your client naturally wonders, "what's ours worth now?'

Matrix setup steps:

1. Go to Search > Residential.
2. In the address fields, enter the Street name in the St Name field.
3. Enter a house number range (e.g., 100 to 199) in the St # field.
4. Choose the city where the house is located and select it.
4. Set Status to include Active, Pending, Sold (so they see neighborhood activity).
6. Click Results, then Save > New Auto Email.
7. Create the past client as a Contact or select them if they are still in your Matrix contacts.
8. Set Schedule to Daily. Click Save.

#9 Calling All Investors

Ugly houses alert

Catch patterns: older homes + fixer language = higher chance of value-add potential. Prospecting for deals, not touring for clients.

Matrix setup steps:

1. Go to Search > Residential.
2. Enter your target area.
3. Set Year Built maximum to 1980 (or your preferred cutoff).
4. Scroll to the Public Remarks field (or add it via Additional Fields if not visible).
5. Enter keywords with wildcards: *as-is*, *needs TLC*, *cash*, *estate*, *handyman*, *fixer*, *investor*
6. Note: Separate keywords with commas. The asterisk (*) is the wildcard in Matrix.
7. Click Results to verify. Refine keywords as needed.
8. Save > New Auto Email. Set Schedule to Daily or ASAP. Click Save.

#10 Neighborhood Narrative Builder

Post like a local

Use subscriptions for any changes in a very specific polygon like a neighborhood. Use these changes for social media posts: “This week in [neighborhood]: 3 new listings, 2 went pending, 1 price drop.” Position yourself as the agent who tracks the market.

Matrix setup steps:

1. Go to Search > Residential.
2. Click Map Search. Draw a tight polygon around the specific neighborhood.
3. Set Status to Active, Pending, Sold/Closed.
4. Click Results, then Save > New Auto Email.
6. Set yourself as the Contact.
7. Set Schedule to Daily (ideal for weekly social media posts).
8. Click Save.

#11 Pre-Listing Intel

What are we up against?

Run a search before you do a listing presentation or sign an agreement to shape pricing and prep expectations.

Matrix setup steps:

1. Go to Search > Residential.
2. Click the Map tab. In the Jump to Address box, type in the name of the property where you are going to give a listing presentation.
3. Click on the Radius button on the toolbar (just right of the car icon) and click on the parcel where the red dot is and move the radius out .5 or 1 mile.
3. Go back to the Criteria tab and set Status to Active, Under Contract, Pending.
4. Set property type criteria to match your listing (beds, baths, approximate price range).
5. Click Results to review the competitive landscape.
6. Save > New Auto Email. Set yourself as the Contact.
7. Set Schedule to ASAP so you catch price drops and status changes before the listing appointment.
8. Click Save.

#12 The Nosy Neighbor Alert

Stay top-of-mind after closing

Keep your name showing up monthly – tied directly to the value of their biggest asset.

Matrix setup steps:

1. Go to Search > Residential.
2. Click Map Search. Use the Radius tool centered on the client's address, drag to ~0.5 mile.
3. Set Status to Sold/Closed only.
4. Click Results to verify, then Save > New Auto Email.
5. Create or select the former client as a Contact.
6. Set Schedule to Monthly (Matrix sends on the 1st of each month at midnight).
7. Click Save.

#13 The Portfolio Acquisition Play

Bulk deal trigger alerts

If the landlord lists just one property as a "test", you can strike to negotiate a bulk deal for all 5 – or however many they own.

Matrix setup steps:

1. Go to Search > Residential.
2. In the address fields, enter the Street name in the St Name field.
3. Enter a house number in the St # field. Click on the More button and do it for every property
4. Choose the city where the house is located and select it. This will only work if they are in the same city. If you don't use city, then you may get some false positives in the addresses aren't unique.
5. Set Status to include Active or Coming Soon.
6. Click Results, then Save > New Auto Email. Set yourself as the Contact.
7. Set Schedule to ASAP. Click Save.

#14 Dream Home Watchlist

First to know

When a specific "dream" home finally hits the market, a subscription can help you be the first to act.

Matrix setup steps:

1. Go to Search > Residential.
2. Enter the exact street address in the address fields (Street Number + Street Name).
3. Leave Status set to all available statuses.
4. Click Results. You may see past listings or no results (that's fine—the Auto Email watches for future listings).
5. Click Save > New Auto Email.
6. Select or create the client as a Contact.
7. Set Schedule to ASAP.
8. Click Save.

#15 Single-Listing Spyglass

Track it end-to-end

Use a subscription on a specific MLS number so you can be alerted to all changes. If the listing is a true competitor to one of yours, this becomes a real-tie comp monitor.

Matrix setup steps:

1. Go to Search > choose the appropriate property type.
2. Enter the MLS# in the MLS Number field (or type it into the Speed Bar at the top of Matrix).
3. Click Results to pull up the listing.
4. Click Save > New Auto Email.
5. Set yourself (or your client) as the Contact.
6. Set Schedule to ASAP so you're notified of every change—price adjustments, status changes, open houses, etc.
7. Click Save.