Matrix™ 8.1

Quick Start Guide

Confidential to CoreLogic®

Table of Contents

Introduction

Welcome

Whether you're a seasoned veteran or brand new to Matrix™, we'd like to welcome you to Matrix 8.1 (Matrix 360)—the newest version of Matrix that fully integrates Realist® property data.

Matrix is mobile friendly, cross-browser compatible and has long been considered, by many, the most intuitive MLS software available today.

For those who may struggle, however, we have created this manual to help get you to where you need to be in the quickest, most productive way possible.

Since the release of Matrix 8.0, our team has continued working hard to improve upon the user experience. Whether developing efficiency-rich features or creating in-depth training tutorials, we remain committed to bringing the best out in you.

A few things you should know.

Matrix is currently used by over 750,000 real estate professionals worldwide. However, because no two MLS's or Associations are exactly alike, some of the fields, data and images used in this guide may differ slightly from the system that you're currently working on. Rest assured, however, that the concepts are the same and that you will easily recognize the ones used here with those of your own.

Secondly, Matrix is an online MLS software system so you must be using an active Internet connection.

Third, all highlighted controls in Matrix represent mandatory fields that must be completed before you are able to proceed with that feature.

Finally, if after using this guide, you're still unclear about anything you read, we invite you to check out the video tutorials listed in your system's, "**Help**" section or found under, "**Agent Support**" near the bottom of **corelogic.com/matrixhelp**.

Enjoy.

The Matrix Team

NEW in this Guide

What's New

The following items have been added, or enhanced, since the Matrix 8.0 (Matrix 360) Quick Start Guide:

1. **Market Watch Widget Refresh:** refresh real-time Market Watch counts at any time.   Page 3

2. **User-defined Radius:** in addition to the existing pre-set options, you may now isolate all properties around a specific location by manually adding an exact distance to the textbox.   Page 6

3. **Email My Listings:** email your own listings directly from the, "My Listings" page.   Page 21 & 38

4. **Print Header and Footer:** include a header, a footer or both when printing Displays and Reports. Your selection is retained for future print jobs until changed.   Page 36

5. **Print Preview of Multi-Map:** click, "Preview" then adjust the interactive multi-map to position exactly how you'd like the selected properties to print.   Page 36

6. **Tips and Tricks:** broken down by sections, this collection of useful tips will help ensure that you're using each Matrix feature as efficiently as it was designed for.   Pages 46 – 58

Home

Home Widgets

All Home widgets, with the exception of the, "News & Alerts" widget, can be **repositioned** by clicking, and dragging, the widget header.

Widgets can be **collapsed or expanded** by hovering over the widget header and clicking the, "up" ▲ or, "down" ▼ icon.

Widgets can be **closed** by hovering over the widget header and clicking the, "close" ⊠ icon. Closed widgets are automatically sent to the, "Additional" widget and can be added back to the Homepage simply by clicking, and dragging, the closed widget header out of the, "Additional" widget.

1 **News & Alerts:** click an item from the list to display the news or alert content in a modal pop-up window.

    🌐 Read Later   ✓ I've Read This

    Note: important items are represented by an, "exclamation mark" icon ⚠

    Note: close the modal pop-up by choosing to either read the item immediately or at a later time.

2 **My Carts:** click a cart link to display all listings currently saved in a recently used Cart.

3 **Recent Portal Visitors:** quickly view a recent Portal visitors information by clicking on their name or open their Portal by clicking on the associated, "Portal" 👤 icon.

    Note: includes only the 10 most recent Portal visitors within the last 30 days.

    Note: the time/date stamp indicates when the contact last visited their Portal.

    Note: the Note icon 🔲 indicates any new or existing, notes written by you or the Portal visitor. Click icon to view.

    Note: the Favorite and Possibility 💗 💡 💐 icons indicate the folders where listings have been added.
    Click an icon to view.

4 **Market Watch:** click on a link to display listings with a change to that activity or status.

    Note: each number (in brackets) represents how many listings results will be displayed based on the Property Type and time frame you selected.

    Note: click the, "Refresh" link to update the counts at any time.

    Note: for more information, see, "Market Watch (Customize)" in the, "Home" section.
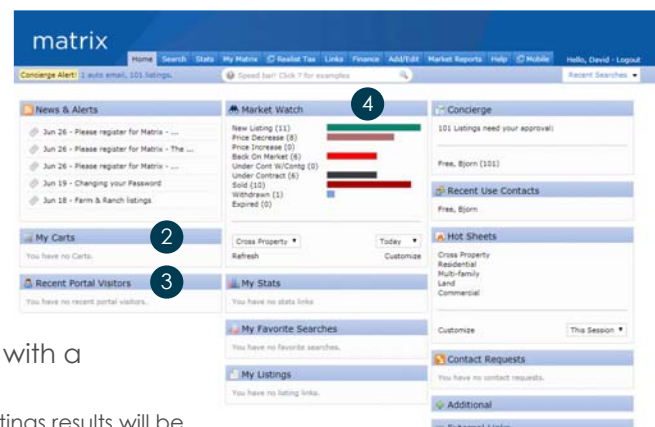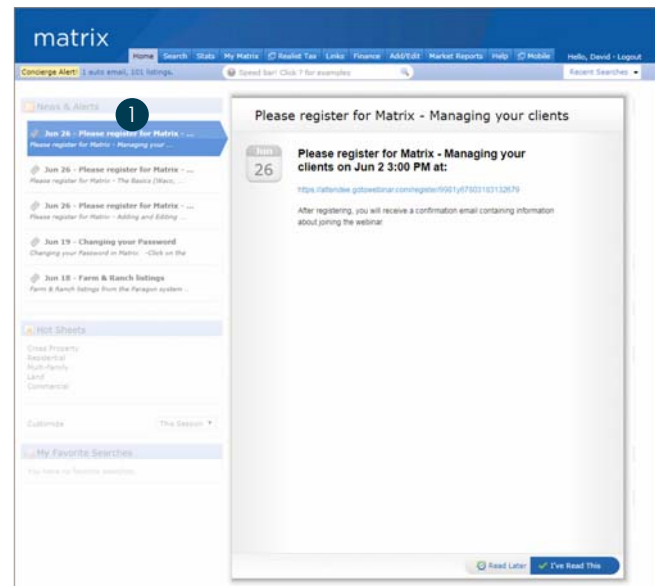
5 **Stats:** click a link to run your saved preset chart statistic.
> **Note:** for more information, see, "Stats (Save)" in the, "Stats" section.

6 **My Favorite Searches:** click a link to display the results of your favorite saved search.
> **Note:** manage your favorite search by clicking on the, "Manage" link located to the right of the saved search name.

> **Note:** a maximum of 10 favorite searches per agent.

> **Note:** to create a favorite search, see, "New Saved Search" under, "Button Bar" in the. "Search" section.

> **Note:** click, "Update All" to view the number of new listings there are for each Favorite Search since the last time the, "Update All" link was clicked.
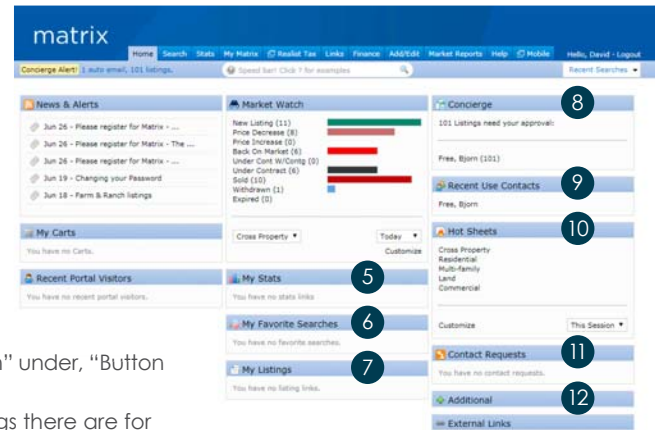
7 **My Listings:** click a link to display all your listings (based on status and property type).
> **Note:** each link displays the status, the property type and (in brackets) the current number of listings.

8 **Concierge:** click a client's name to display all listings waiting on approval before being sent.
> **Note:** each link displays the client's name and (in brackets) the number of listings waiting on approval.

> Concierge Alert! You have 2 Auto Emails (164 listings in total) awaiting your approval.

> **Note:** a, "Concierge Alert" also appears, on each page, to the left of the Speed Bar textbox.

9 **Recent Use Contacts:** click a name to display details of a recently used contact.

10 **Hot Sheets:** click on a property type link to display all listings with a status change during the specified time frame.
> **Note:** see, "Hot Sheets (Customize)" in the, "Home" section to customize this widget.

11 **Contact Requests:** click on a name to view information sent from your IDX or Agent Website visitor.

> Show All Fields   Delete   Cancel   Add

> **Note:** see, "IDX Configuration" in the, "My Matrix" section for more information.

12 **Additional:** close any widget or click and drag widget headers to/from this area to help manage the Homepage layout.
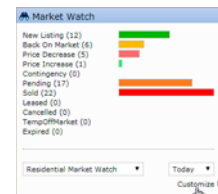
Market Watch (Customize)

1 From the Home Page, click, "**Customize**" on the, "Market Watch" widget.

2 Click the, "**Map Search**" link and use the map shape tools to select specific areas to watch (optional).
> **Note:** you may also select a general location from any of the controls below the Map link.

3 Enter the specific **criteria** that you would like to include as part of your customized search.
> **Note:** for more information, see, "Criteria Search" in the, "Search" section.

4 Add/Remove **Additional Fields** (optional).

5 Click, "**Save**" on the Button Bar.
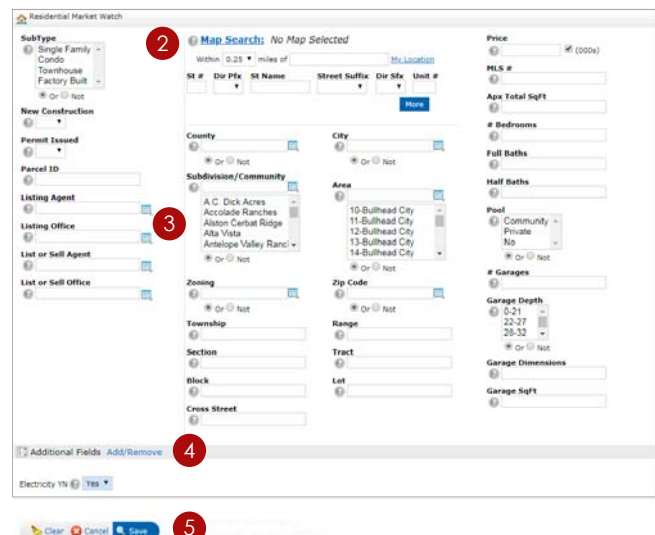
6 Select a **property type** from the dropdown list.

7 Select a **time frame** from the dropdown list.

8 Click a **status** link to view listings that now meet your new, custom Market Watch search criteria.

Note: to run another Market Watch search without having to return to the Homepage, click the dropdown arrow, on the, "Results" page, to display your Market Watch options.

Hot Sheets (Customize)

1 From the homepage, click the "**Customize**" link on the "Hot Sheets" widget.

2 Select a Hot Sheet to **manage**.

2a Click the "**Add**" link to create a new Hot Sheet.

Note: select a Property Type from the dropdown list then name your new Hot Sheet and click, "Save".

Note: you may customize a maximum of 10 (default) Hot Sheets.

2b Click the "**Edit Criteria**" link to edit an existing Hot Sheet.

Note: Enter the specific **criteria** that you would like to include as part of your customized search then click, "Save".

Note: for more information, see "Criteria Search" in the "Search" section.

3 Select a **time frame** to use for your Hot Sheet.

New Only: only shows listings which are new/changed since the last time the user ran the Hot Sheet. For example: if a user logs in at 9:00am and runs the Hot Sheet, then later within that same sessions runs it again, this option would show only listings new/changed since 9:00am.

This Session: only shows listings which are new/changed since the last time the user ran the Hot Sheet in a prior session. For example, if a user logs in at 9:00am and runs the Hot Sheet and sees 50 listings, then later within that same session runs it again, this option would show them those same 50 listings new/changed since 9:00am.

24 Hour, Today, 3 Days, 7 Days: only shows listings which are new/changed during the specified time frame.

Custom: allows the user to run a Hot Sheet using a custom date (within the last 30 days of the current date), or a time range.
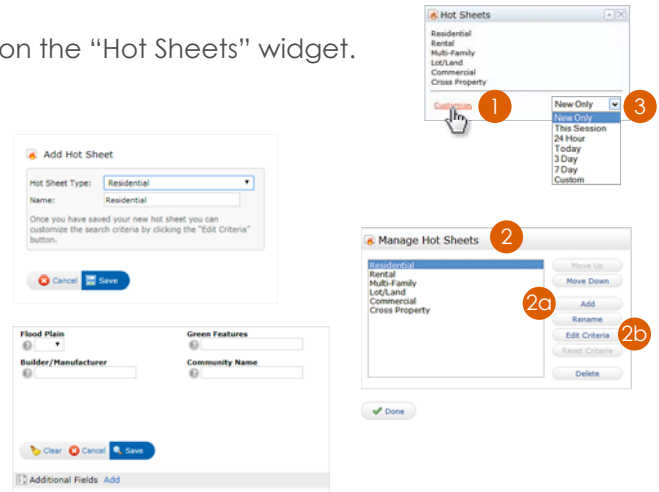
Search

Criteria Search

1 From the Matrix navigation menu, hover the **Search Tab**.

2 From the dropdown list, select the desired **Property Type** (e.g. Residential, Commercial, Land, Tax, Cross Property etc.) then click on the link for the type of search to run.
> **Note:** clicking on the Search tab displays a page with all available search forms.

3 From the **Criteria tab**, enter your search criteria.
> **Note:** enter price in thousands of dollars if checkbox is selected or not available.
> **Note:** select multiple listbox options by clicking an item while holding down the, CTRL (Windows) or Control (Mac) key.
> **Note:** select the, "And" radio button for results that contain all of the selected item(s).
> select the default, "Or" radio button for results that contain any of the selected item(s).
> select the, "Not" radio button for results that contain none of the selected item(s).

3a Click the, "Map Search" link (Map Search:) or click the Map tab to include/exclude specific map areas to your search.
> **Note:** manually enter a distance or use the pre-set options to isolate all properties within a specific radius.
> **Note:** for more information, see, "Map Search" under the, "Search" section.

4 Add/remove additional fields that did not initially appear on the form.

5 Click the, "**Settings**" icon to save the current criteria as the default each time this search form is used.

6 Click, "Search" on the **Button Bar**.
> **Note:** for more information, see the, "Button Bar" section for a full list of Button Bar functionality.
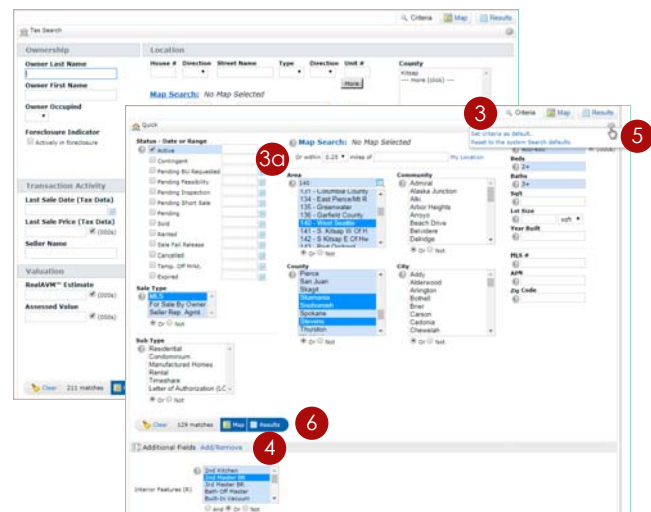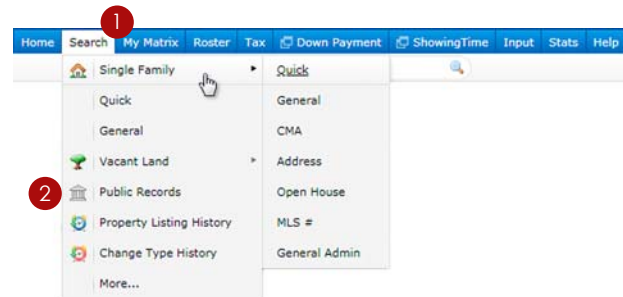
Map Search

1. Click the **Map** tab.

2. Click and drag the map or **zoom in and out** to your desired location.

   Note: Use the, "Jump to Address" dropdown list

   `Jump to Address` to quickly locate a specific map area.

   Note: if your search criteria generates between 500 and 5000 results, click on a map cluster to display the (indicated number of) listings for that area.

3. Using one, or a combination of all **four shape tools** (Radius, Rectangle, Polygon and Freehand ⬭ ☐ ◢ ◖ ➤), draw a shape to isolate multiple areas on the map.

   Note: be sure you have added search criteria in the Criteria section.

   Note: If the number of results exceeds the maximum number of listings allowed to display (at this time, 500) then you may have to zoom in on the map or narrow your search criteria.

   Note: during radius sizing, shape automatically displays distance from its center to the edge.

   Note: clear all shapes by clicking the, "Clear All Shapes" icon 🧹 .

4. When all areas on the map have been selected, you may choose to **Delete**, **Include** or **Exclude** any area simply by hovering over the shapes red dot.

   Note: overlap two shapes then hover either red dot > Exclude this Shape to also exclude the area where the two shapes intercept.

   Note: reposition a shape by clicking its red dot and dragging it to the new location.

5. Click the **Ruler** link, then click any two points on the map to measure the distance between them.

6. Select/de-select multiple properties.

   `All · None · Page · ☑ 📝`

   Note: "All" selects all listings on the map whether visible in the viewport or not.

   Note: "None" deselects al selected map properties.

   Note: "Page" selects only map properties visible in the viewport.

   Note: clicking the, "Single Checkbox" icon ☑ allows you to select properties, one-by-one. Clicking the, "Single Checkbox" icon again turns this feature off.

   Note: clicking the, "Multiple Checkbox" icon 📝 allows you to select multiple properties by clicking and dragging your cursor over the desired properties. This feature automatically turns off when the properties have been selected.

7. Choose from either a **Road view** or **Bird's eye view**.

8. View partial listing details by clicking on any **marker**.

   Note: from inside the map marker pop-up, click the MLS# to view the 360 Display.

   Note: click the checkbox to select the property.
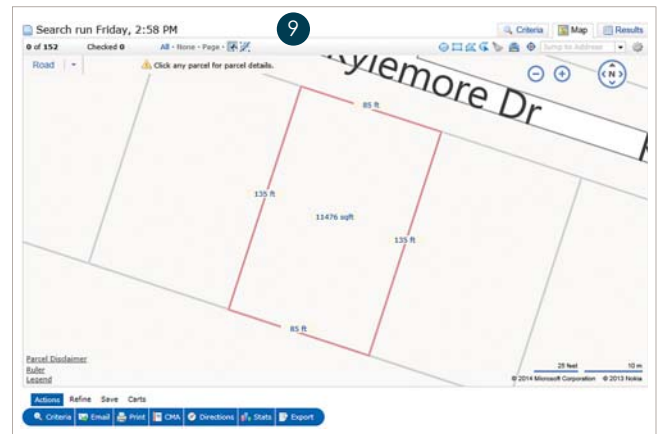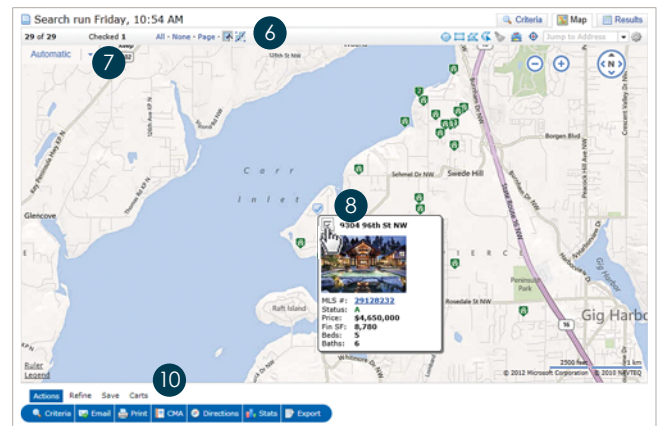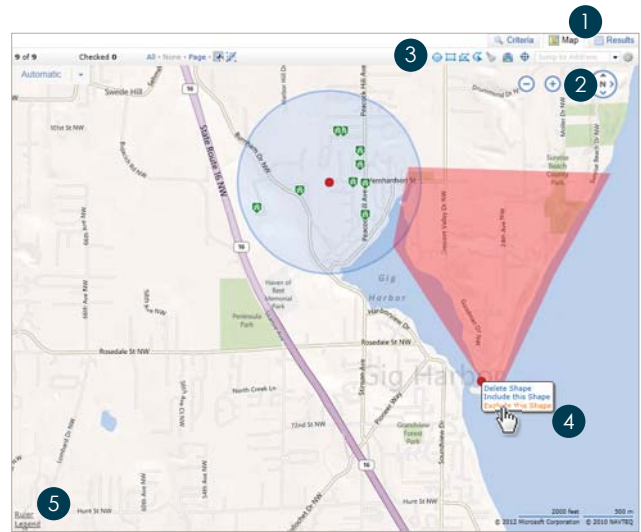
⑨ View **Lot Dimensions** by zooming in on the map, select any lot parcel and, from the information pop-up, click the, "Lot Dimensions" link.

> **Note:** for more information, see the, "Property Map" tab under, "Search Displays" (360 Display) in the, "Search" section.

⑩ Select map listing(s) and use the **Button Bar** to perform a task.

> **Note:** see, "Button Bar" section for a full list of Button Bar functionality.

1818 77th Ave NE
Medina, WA 98039-2307
Owner: **Lu Ding & Tian Shi**
Land Use: **Sfr**
7 Bedrooms, **8** Full Baths, **1** Half Baths, **6,440** SqFt, Built in **2014, 0.63** Acres
Last sold on **05/18/2015** for **$6,210,000**
Active 10/07/2016

🏠 **Listing**   🏛 **Tax**

Lot Dimensions ⑨

Map Layers

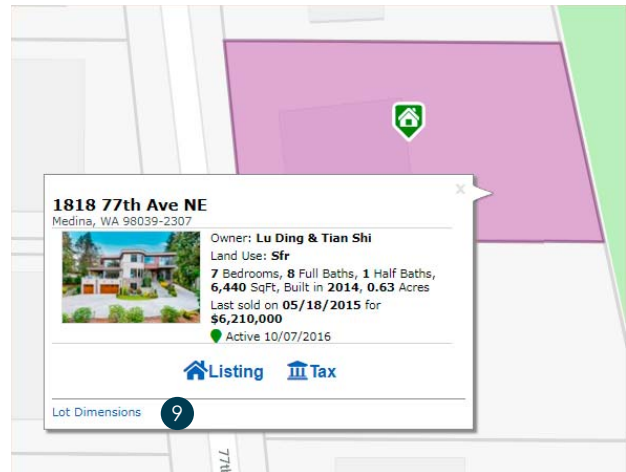Design your own custom maps by choosing from dozens of layers of geographic information. Each layer can be displayed individually or mixed with others to create the perfect map to meet your needs.

Note: only existing Realist® customers may have access to Map Layers.

Note: you may be prompted to zoom in to enable certain map layers.

① Click the **Map** tab.

② Click and drag the map or **zoom in and out** to your desired location.

> **Note:** use the, "Jump to" dropdown list [Jump to Address ▾] to quickly locate a specific map area.

③ Click the, **Map Layers** icon 📑 to choose which of the map layers to activate.

> ▸ Boundaries
> ▸ Parcel Characteristics
> ▸ Trends
> ▸ Points of Interest
> Clear All
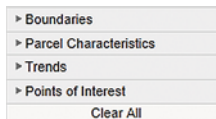
Note: click a section panel to expand category.

Note: click the, "Clear All" button to reset the map layers.

③a Click to expand the, "**Boundaries**" section.
> **Note:** contains colored delineations of geopolitical entities.
> **Note:** ctrl-click any shaded area for layer details.

Parcels

Zip

Unified School District

Neighborhood

City

County

Flood Zones

- Coastal 100-Year Floodway
- Coastal 100-year Floodplain
- 100-year Floodway
- 100-year Floodplain
- Undetermined
- Unknown or Area Not Included
- Out of Special Flood Hazard Area
- 500-year Floodplain including levee protected area
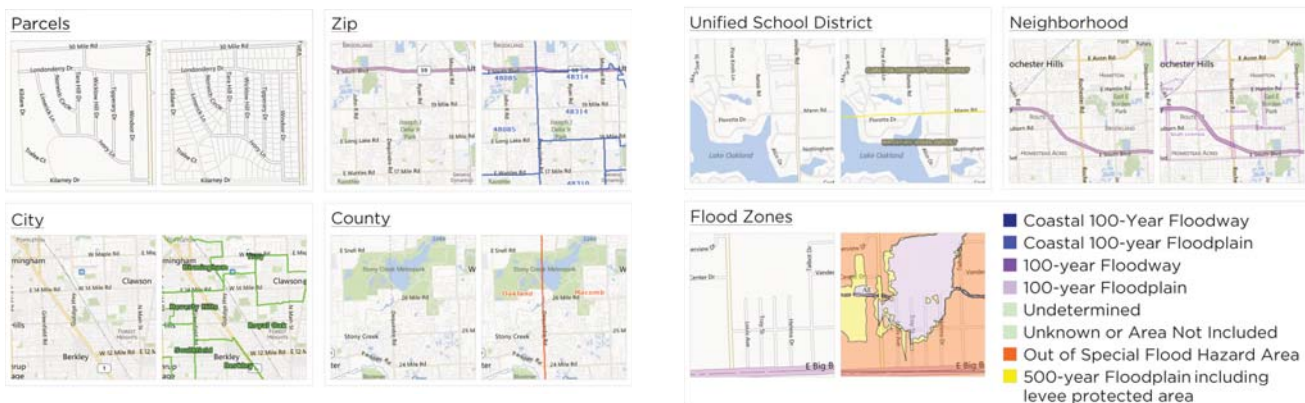
3b Click to expand the, "**Property Characteristics**"
section.

Note: contains detailed information about individual properties.

Note: click any parcel for parcel details.
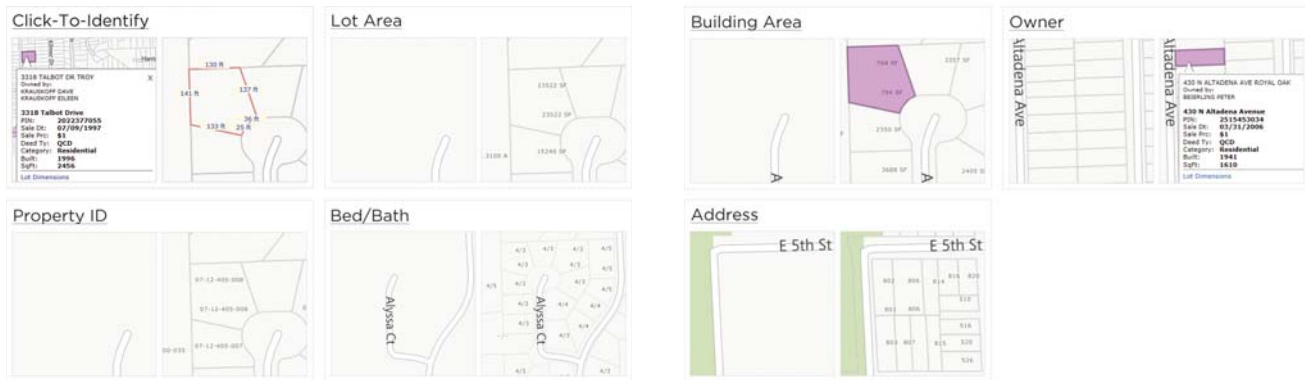
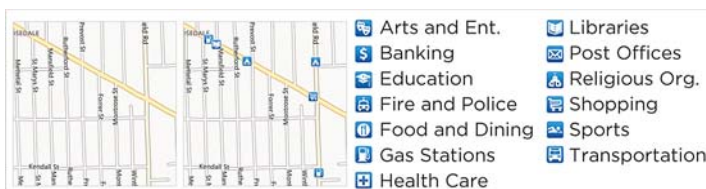**3c** Click to expand the, "**Trends**" section.

Note: contains aggregated information available for condos, single-family, or both, for each of zip and neighborhood aggregation levels.

Note: ctrl-click any shaded area for layer details.
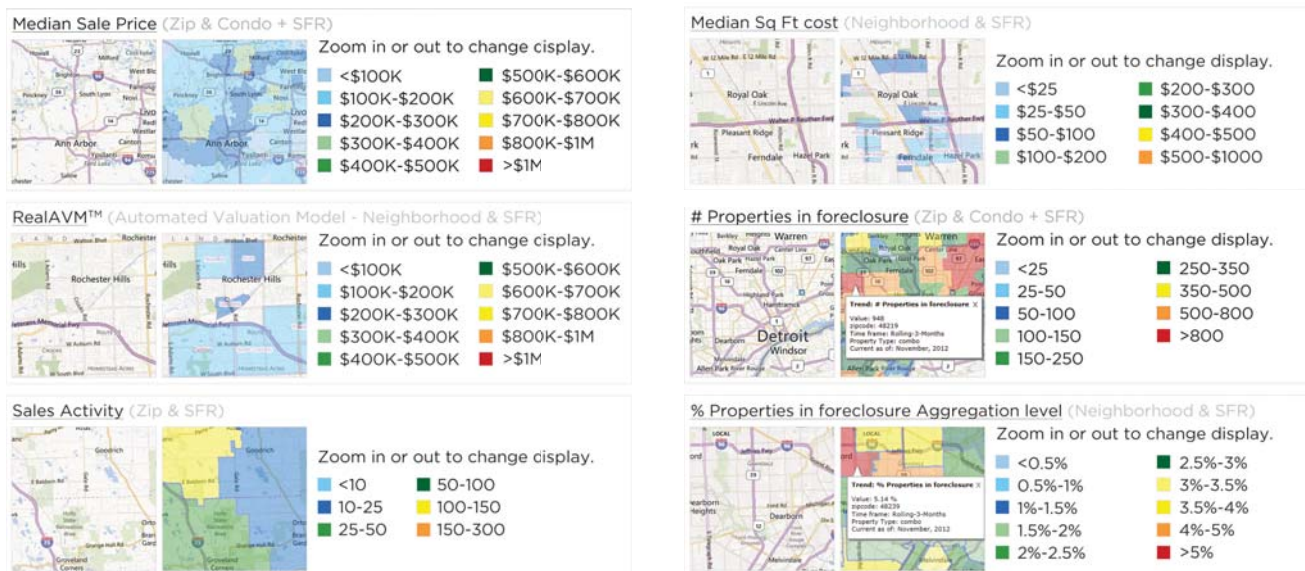
3d Click to expand the, "**Points of Interest**" section.

Note: Bing-provided, local business and community location markers.

Search Results

① Click the **Results** tab.

② Click the, "**per page" dropdown list** to change the number of search results displayed per page.

③ Click the, **"Display" dropdown list** to change your current Display.

> **Note:** see, "Search Displays" in the, "Search" section for additional information.

④ Click the, "**Settings**" icon to set the current Display and number of results per page as your default.

⑤ **Select/deselect** one or more properties to work with.

All: selects all listings whether visible on-screen or not.
None: deselects all selected listings.
Page: selects only listings that are currently visible on-screen.

⑥ Click Previous/Next to view **additional property results**.

> **Note:** click a page number to view that specific Results page.

⑦ Select properties and use the **Button Bar** to perform a task.

> **Note:** see the, "Button Bar" section for a full list of Button Bar functionality.

⑧ Click the MLS# or Tax ID link to view **full property details**.

> **Note:** depending on the system, a link to tax information may need to be accessed via the tax icon.

⑨ View **additional property icon options**.

> **Note:** though some options may differ between systems, the following icons should be familiar to most:

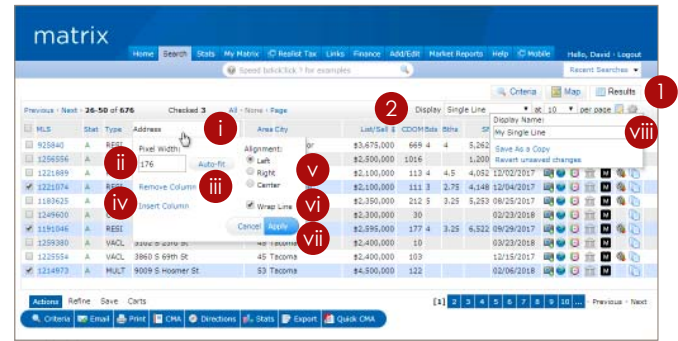|			
🖼️	**Map:** view property location on a map.	🕐	**History:** view property history.
🖼️	**Photo:** view property photo/slideshow popup.	🏛️	**Tax:** view property public tax record.
📑	**Attachments:** view property supplements.	🌐	**Virtual Tour:** view a virtual tour of property.
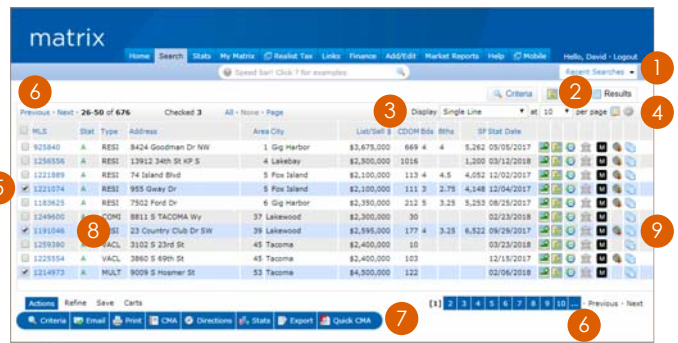
Search Displays

1 Click the **Results** tab.

2 Click the, **"Display" dropdown list** to change your current Display.

> **Note:** since names and layouts vary between systems, the examples below are only to illustrate workflow and do not necessarily represent all available Displays.

2a **Single Line Display** (Customizable Grid)

i While in, "Single Line" Display mode, click the **column header** to open the column's property dialogue box.

> **Note:** clicking the header text sorts the column.
>
> **Note:** selected columns can also be renamed.

ii Enter a **fixed pixel width** or click, "**Auto-fit**" to set a dynamic width that changes.

iii Click the, "**Remove Column**" link to delete the selected column.

iv Click the, "**Insert Column**" link to add a new column beside the selected column.

v Select how the columns should **align**.

vi Select if longer content should always be visible and **wrap** on multiple lines within the current cell or stretch beyond it and be hidden.

vii Click the, "**Apply**" button to commit your changes.

viii Click the, "**Manage Display**" icon to save your new Custom Display to the, "Display" dropdown.

2b **360 Display** (Multi-tab Property View)

i **Listing:** view either current, or last listed, information about this property.

ii **Tax:** view calculated values and up-to-date tax information for this property.

iii **Photos:** view the collection of property photos.

iv **History:** view a complete history of this property including listing, mortgage and tax information.

v **Property Map:** an interactive map showing a satellite view, parcel dimensions and geographic overlays.

vi **Flood Map:** view flood zones within the surrounding area.

Speed Bar Search

1 Enter **Speed Bar Shortcut criteria** into the textbox.

> A S PB180 PS180 03 RESI 2+ 3+   + ☑ other criteria
> Year Built is 2005+

> **Note:** since each system define their own default Speed.Bar shortcuts, the intention here is simply to illustrate general guidelines around entering the criteria.

> **Note:** click the Speed Bar help icon for a list of commonly used system shortcuts.

> **Note:** the Speed Bar automatically populates each time a search is run with criteria entered in the, "Criteria" tab. Hover over the, "other criteria" checkbox (if visible) to view any criteria used that has not been defined as a system Speed Bar shortcut.
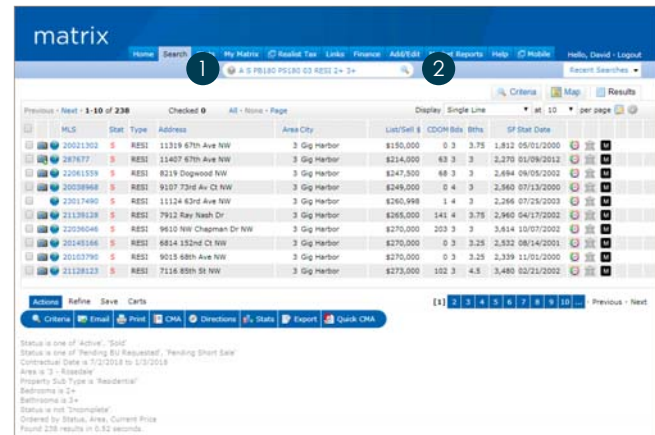
> **Note:** create a custom Speed Bar shortcut to use criteria that has not been defined as a system Speed Bar shortcut (for more information, see the, "Speed Bar Shortcut (Create)" section.

> **Note:** Speed Bar shorthands can, typically, be entered in any order - the exception being, when using bedrooms and bathrooms together in the same Speed Bar search, bedrooms must be first (i.e. 2+ bedrooms and 3+ bathrooms would be written, "2+ 3+"). Also, statuses must be grouped when used together (i.e. Active, Sold, Pending Backup and Pending Short would be written (**A S PB PS**).

2 Generate a search.

Speed Bar Shortcut (Create)

1 Create a **search**.

2 From the, "Results" or "Map" tab, click, "**Save**" > "**New Speed Bar Shortcut**" on the Button Bar.

> Actions Refine Save Carts
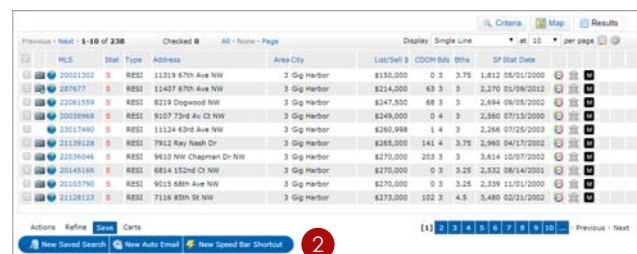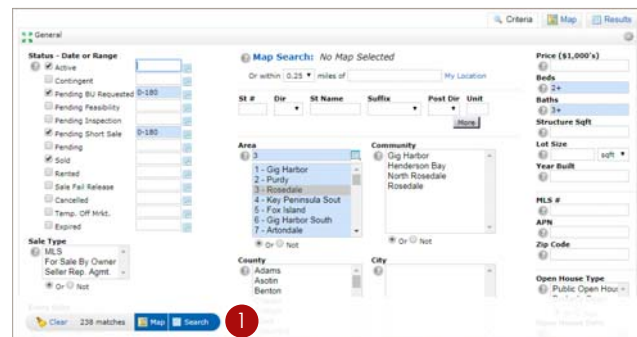> New Saved Search   New Auto Email   New Speed Bar Shortcut

3 Create a **custom name** for your new Speed Bar Shortcut.

> **Note:** name must always be preceded by a forward slash (i.e., /lakeside).

> **Note:** name may not include spaces, symbols or punctuation.

4 Click, "**Save**".

Speed Bar Shortcut (Use)

❶ From anywhere in the Speed Bar textbox, **enter your custom Speed Bar Shortcut name**.

> 🌐 /lakeside a $1000-1500 sf   🔍

> **Note:** name must always be preceded by a forward slash (i.e., /lakeside).
>
> **Note:** Speed Bar Shortcut may be combined with other Shorthand criteria.

❷ Click, the Speed Bar "**Search**" icon 🔍.

Recent Search

❶ From the "**Recent Search**" dropdown list, select the previously run search criteria you would like to use.

> **Note:** lists up to 50 of your most recent searches.
>
> **Note:** unused searches are automatically removed after 1 week.
>
> **Note:** each list item contains search criteria, a date/time stamp (when search was last run) and the number of results that were generated.
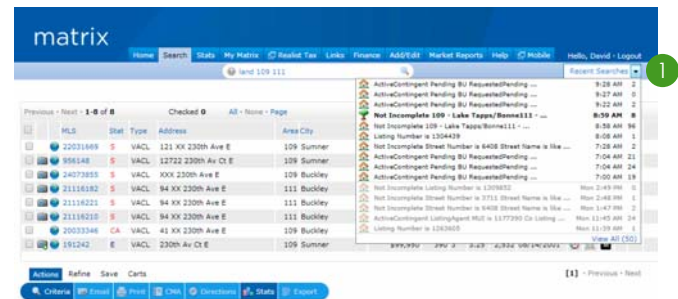
INRIX Drive Time™

Included as an option in some Matrix™ systems, INRIX Drive Time™ allows agents to isolate listings that are located within a certain driving distance of a specific address.

❶ Choose any method to **generate your search results**.

> **Note:** for more information, see the, "Search" section.

❷ Click the, "**Map**" tab.

❸ Click the, "**INRIX**" 🔽 icon.

❹ From the pop-up, select your **Drive Time criteria**.
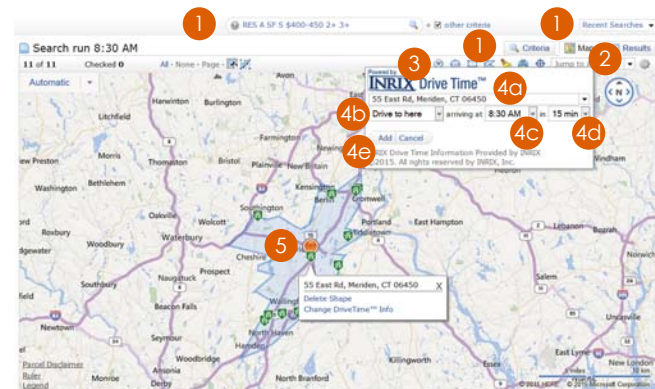
> ④ₐ Add the **address**.
>
> ④ᵦ Select if this is the address you will be driving **to** or **from**.
>
> ④ᵪ Select what **time** you would like to reach your destination.
>
> ④ᵈ Select **how long** you would like to drive for.
>
> ④ₑ Click the, "**Add**" button to view your results.

❺ Click, or hover, over the INRIX address marker to **delete or edit** your Drive Time settings.

My Matrix

Contents (Add)

1 From the Matrix navigation menu, hover the, "**My Matrix**" tab and select, "**Contacts**".

2 Click, "**Add**" on the Button Bar.

Note: see, "My Matrix > Contacts" in the "Button Bar" section for a full list of Button Bar functionality.

3 From the, "**Personal Information**" modal pop-up, fill out all **mandatory fields** (highlighted background in yellow).

4 Additional **optional fields**, (no highlighted background) can be viewed by clicking the, "Show All Fields" link on the Button Bar.

4a Select the, "**Enable Reverse Prospecting**" checkbox to show the listing agent that their listing has been sent to this (anonymous) contact.
Note: for more information on "Reverse Prospect" see, "My Matrix > My Listings" in the "Button Bar" section.

4b Select a, "**Salutation**" to include on outgoing messages sent, from Matrix, to this contact.

4c Select the, "**Mortgage Pre-Approved**" checkbox if this contact has been pre-approved (this will be indicated in the listing agent's reverse prospecting section).
Note: for more information on "Reverse Prospect" see, "My Matrix > My Listings" in the "Button Bar" section.

5 Click, "**Save**" on the Button Bar.

Contacts (Manage)

① View number of, "**Contacts**" displayed.

② **Search** for contacts by name or by filter.

③ Click the, "**Expand**" ⊡ icon to open a section panel. Click the, "**Collapse**" ⊡ icon to close a section panel. Click the, "**Collapse All**" ⊡ icon to close all subsection panels at once.

④ **Manage** Contact.

Edit Contact | Delete Contact | Start CMA | Open Portal | Open Cart

Edit Contact: update contact information (for more information, see, "Contacts (Add) in the, "My Matrix" section.

Delete Contact: permanently delete this contact.

Start CMA: start a CMA for this contact (for more information, see, "CMA (Create)" in the, "My Matrix" section.

Open Portal: open this contact's portal.

Open Cart: open this contact's cart.

⑤ Expand to view, or manage, the following items.

⑤a **Portal Activity:** view a timeline of this contact's most recent Portal activity.
Note: includes only the most recent Portal activity.
Note: click an, "Activity" link to view the specified action.

⑤b **Portal Searches:** view the results of custom searches created, and saved, in the Client Portal.

⑤c **Auto Emails:** manage each of the Auto Emails created for this contact.

Settings | Criteria | Results | Date Since | Market Update | Open in Portal | Resend Welcome | Delete Auto Email

Settings: enable/disable this Auto Email or modify the default settings.

Criteria: modify this Auto Email's search criteria.

Results: display the results of this Auto Email's search criteria.

Date Since: display the results since the last time the search was run or between the specified date range.

Market Update: display the results since the last time the, "Date Since" button was clicked.

Open in Portal: open this contact's Client Portal in BCC Mode (in some systems, this means an agent may only view and not modify the Portal).

Resend Welcome: resend the Auto Email notification to the contact's email account (not available if Auto Email has been viewed).

Delete Auto Email: permanently delete this Auto Email.

⑤d **Saved Searches:** manage each of the saved searches created for this contact.

Note: for more information, see, "Saved Searches" in the, "My Matrix" section

⑤e **CMAs:** manage each of the CMAs created for this contact.

Edit CMA | View CMA | Email CMA | Delete CMA

Edit CMA: for more information, see, "CMA (Create)" in the, "My Matrix" section.

View CMA: view this CMA (.pdf).

Delete CMA: permanently delete this CMA.

Note: CMAs are stored on the server for 180 days. To reset the 180 day lifespan, simply make a change to the CMA then resave.

5f **Sent Email:** view a collection of recent emails sent to this contact.

5g **Reverse Prospect History:** view a collection of reverse prospecting emails sent/received.

**Listing #:** click to view the message sent/received.

Ref #: contact reference number the buyer's agent uses to lookup their contact while keeping the contact's name confidential (only visible for Sent Reverse Prospecting Emails).

Recipient: name of the agent the email was sent to.

Date Sent: date the email was sent (displays Time if sent today).

Date Viewed: displays the date of when the buyer's agent read the email ("Never" indicates unread).

Contact Name: click to display your contact's detailed information (only visible for Received Reverse Prospecting Emails).

6 Click a number to view listings that are stored in this contact's cart 🛒 , grouped in their favorite/possiblities/discarded folder 💗 💡 🗑 , or display a collection of sent/received listing notes 📧 (an asterisk represents unread note(s)).

Saved Searches

1 From the Matrix navigation menu, hover the, "**My Matrix**" tab and select, "**Saved Searches**".

2 Click, the **Saved Search name** you would like to manage and select an action.

Settings Criteria Results Date Since Market Update Delete

2a Click, "**Settings**" to update your Saved Search name, assign the search to a specific contact or add/remove it as a Home Page favorite.

Note: saved search can also be turned into an Auto Email.

Note: a criteria summary may be viewed, but not updated.

2b Click, "**Criteria**" to update your Saved Search criteria.

**Note:** for more information, see, "Criteria Search" in the, "Search" section.

2c Click, "**Results**" to display the results of your Saved Search.

Note: for more information, see, "Search Results" in the, "Search" section.

2d Click, "**Date Since**" to display the results of your Saved Search since the last time the search was run.

2e Click, "**Market Update**" to display the results of your Saved Search since the last time the search was run or between a specified date range (i.e. 7/1/2004+, 7/1/2012-7/31/2012 or 0-60).

2f Click, "**Delete**" to permanently delete your Saved Search.
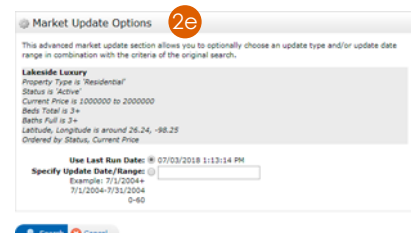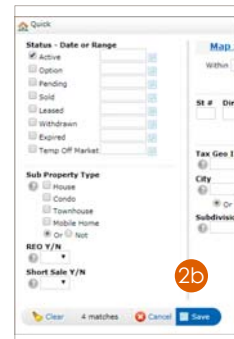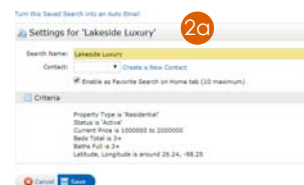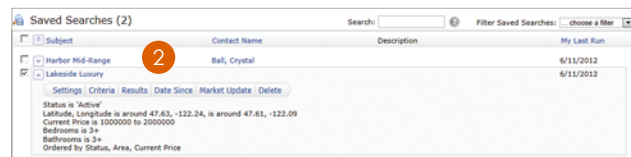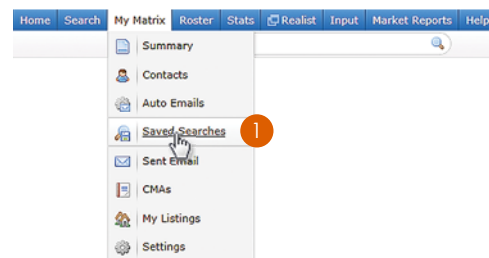
CMA (Create)

1 From the Matrix navigation menu, hover the, "**My Matrix**" tab and select, "**CMA**".

2 Click, "**Start a New CMA**" on the Button Bar.

> **Note:** see, "My Matrix > CMA" in the "Button Bar" section for a full list of Button Bar functionality.

3 Click **Start** (default position) to select a CMA Contact.

> **Note:** from the dropdown list, you may also change your CMA property type as well as add an optional description in the textbox provided description will not be visible on the final CMA).

4 Click **Pages** to select from, "Available Pages".

> **Note:** add Custom Pages (.pdf only) to your CMA by clicking the, "Upload Custom Pages" link located below the, "Available Pages" listbox. By default, you are limited to 5 "My Custom Pages" - each with a maximum file size of 250KB. Only letter size content can be properly accommodated (landscape or portrait).

> **Note:** in the, "Available Pages" listbox, click the, "Expand" ⊞ icon next to a category to reveal the available pages. Alternatively, click the, "Collapse" ⊟ icon to hide the available pages.

> **Note:** in the, "Selected Pages" listbox, select a page, or multiple pages (while pressing the CTRL key), and use the, "Up" ⌃ and, "Down" ⌄ icons to reorder page(s) as they will appear in the final CMA. Also note that the final CMA pages are not numbered so they may also be reordered after print.

> **Note:** in the, "Selected Pages" listbox, select a page, or multiple pages (while pressing the CTRL key), and use the, "Remove" ☒ icon to remove page(s) from the final CMA.

> **Note:** click the, "Set as Default" link to set the selected pages as your starting default for all future CMA's. To restore default pages after removing or reordering pages, simply click the, "Restore Defaults" link.

> **Note:** click the, "Clear" link to remove all pages from the, "Selected Pages" listbox.

5 Click **Subject** to fill Subject Property details from a blank form, a listing number or by searching for a listing.

5a Click the, **Custom Field** dropdown list to add an additional field to the Subject Property.

> **Note:** from the, "Edit Custom Field" pop-up, either manually type in a label name or select the, "Link to a Matrix Field" check box and the label will automatically be added with any stored value.

> **Note:** Click the, "Save Custom Fields as Default" link to include your Custom Fields in future CMA Subject Properties.

6 Click **Cover** to add your contact information, subject photo, agent information and agent logo to the CMA cover.

| Start | Pages | Subject | Cover | Comparables | Map | Adjustments | Pricing | Finish |

Note: this step will be disabled if no cover sheet was selected in, "Pages".

Note: to include the default, or a custom, agent logo on the final cover, ensure that, "Cover Sheet with Agent Photo was selected in, "Pages".

6a Click the, "**Edit my information**" link to update your Agent information as it should appear in all CMA's.

6b Click the, "**Override my information for this CMA**" link to update your Agent information for just this CMA.

7 Click **Comparables** to add comparables from a search or from a cart.

| Start | Pages | Subject | Cover | Comparables | Map | Adjustments | Pricing | Finish |

Search for Additional Comparables   Add Comparables from Cart

Note: for more information, see, "Criteria Search" in the, "Search" section.

8 Click **Map** to include a map that displays the location of comparables in relation to the subject property.

| Start | Pages | Subject | Cover | Comparables | Map | Adjustments | Pricing | Finish |

Note: you must first include the, "Map" page, in the, "Pages" section to enable this step.

9 Click **Adjustments** to adjust a comparable's feature value.

| Start | Pages | Subject | Cover | Comparables | Map | Adjustments | Pricing | Finish |

10 Click **Pricing** to view a Summary of Comparable Prices and Adjusted Comparable Prices.

| Start | Pages | Subject | Cover | Comparables | Map | Adjustments | Pricing | Finish |

Note: add a suggested price based on the low, median, average and high comparable values provided (optional).

11 Click **Finish** for a, "CMA Summary" and to view or email your completed CMA.

| Start | Pages | Subject | Cover | Comparables | Map | Adjustments | Pricing | Finish |

View CMA   Email CMA

My Listings

① From the Matrix navigation menu, hover the, "**My Matrix**" tab and select, "**My Listings**".

② Click the, "**Display**" dropdown list to select the listing **Hit Counters**.

Note: all columns are re-calculated nightly.

②a Client Data

Client Portals: the number of portals your listing has reached by Direct or Auto Email.

Client Views: total number of Full Display views by Clients in their portal.

Client Favorites: number of Clients presently marking this listing as a favorite in their portal.

Client Possibilities: number of Clients presently marking this listing as a possibility in their portal.

②b Agent Data

Auto Emails: number of Auto Email searches presently matching listing.

Prev 14 Day Views: number of times this listing has been viewed in the past 14 days.

Agent Published: in Concierge mode, the number of Auto Emails that found this listing and was approved/sent by agent.

Agent Rejected: in Concierge mode, the number of Auto Emails that found this listing but was rejected/not sent by agent.

Agent IDX Views: number of times this listing has been publically viewed from the IDX on Agent's Website.

Agent Views: number of times this listing has been viewed, by an Agent, from within Matrix. This increases every time an Agent views the Full display for that listing.

③ Click the, "**Show**" dropdown list to select which of your **listing type groups** to display.

④ Click the, "**Click here to run this as a Full Search**" link to display your listings as search results.

Note: running your listings as a search allows for additional functionality. See, "Search Results" in the, "Search" section for more information.

⑤ Select a listing and use the **Button Bar** to perform a task.

Note: for more information, see, "My Matrix > My Listings" in the, "Button Bar" section.

Settings

① From the Matrix top menu, hover over the, "**My Matrix**" option then click, "**Settings**".

② Click the, "**My Information**" link to review your contact information.

    2a **Information:** The, "Information" section contains **personal contact information** that you can share, with Customers and Prospects, from elsewhere in the system.

      i Add, update then review your information to ensure that it's correct.

        Note: information in this section has been pulled from the Roster. Though some fields are locked and may not be modified, textboxes with a checkmark indicate that you may edit the associated field. If, however, any of the information on this page is incorrect, please contact your Board or Associa-tion to have it updated at the source.

      ii Click the, "**Save**" button to save any changes.

    2b **Header & Footer:** Click the, "Header & Footer" tab in the, "My Information" section of, Matrix "Settings".

      i Choose an **Agent banner** to brand the information shared with your Customers and Prospects.

        Note: branding will appear on the Client Portal, the Agent Web Page as well as printed Reports and Displays.

        Note: select the, "I choose not to use a header/footer at this time" option to disable the templates and only brand using your default contact information.

        ⊙ I choose not to use a header/footer at this time

        Alternatively, you can select the, "Basic Template" option to display specific contact information as well as set a unique color theme (see, "Customize Header" in the, "Portal Set-Up" section of this Guide).

      ii Click the, "**Preview**" button.
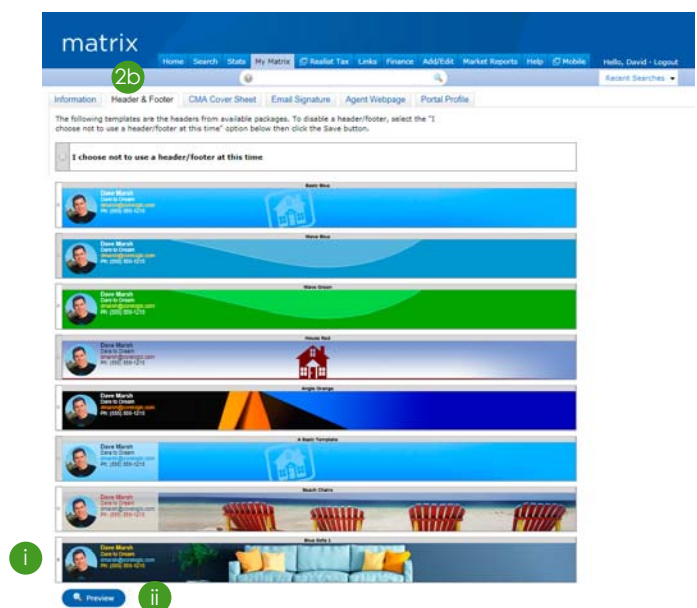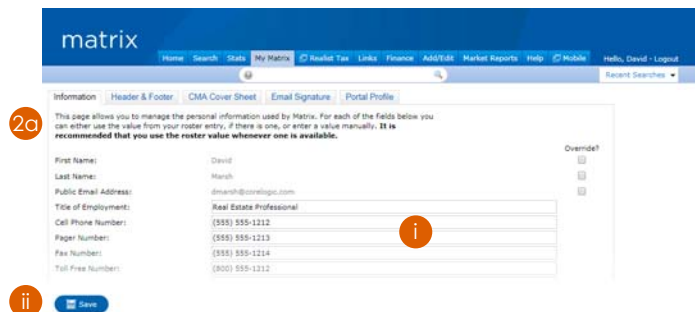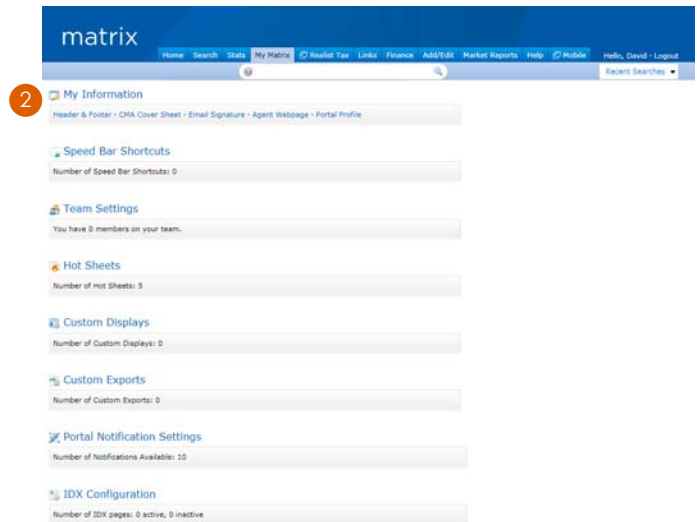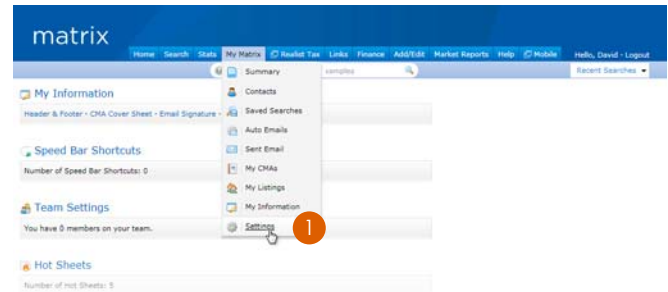
Customize Header

iii From the, "**Header & Footer**" section, review your banner's Header image.

A Click the, "**Select a different banner image/theme**" link to return to the banner section and choose a new theme.

B Click the, "**Upload a custom banner image**" link to replace the default banner image with a custom image from your computer's hard drive.

Note: suggested image dimensions are 1600 (width) x 120 pixels (height). Smaller images will scale-to-fit in height.
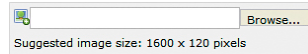
iv Choose an **Agent Photo**.

Note: select the, "No Photo" option to hide your Agent Photo.

Note: to include an Agent Photo, select the, "Use Custom Photo" option then click the, "Change photo" link to update your default image.

v Select the information fields to **brand** your Agent Header.

Note: branding fields are pulled from the, "Information" tab (see, "Information" in the, "Portal Set-Up" section of this Guide).

vi Choose a **color theme**.

C Customize your header color theme by either typing a specific hexadecimal number directly into the textbox or by clicking the color bar and choosing one from the chart.

D Click the, "Transparency Level" dropdown list to choose your branding transparency.

Note: transparency options will determine how much of the banner's background image is visible through the branding (Agent information) area.
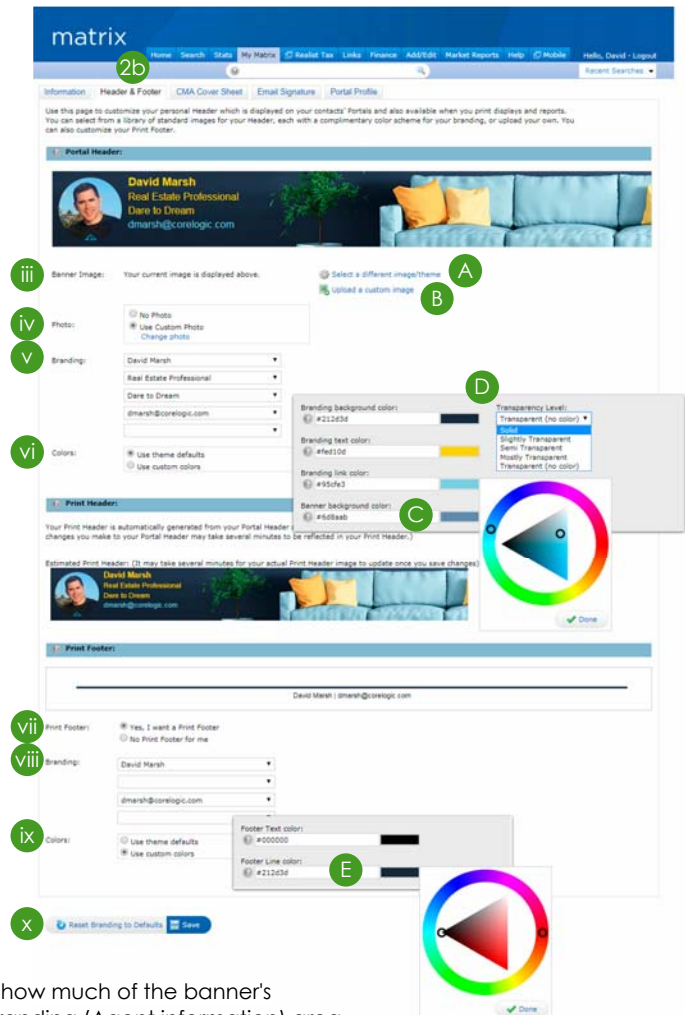
Customize Print Footer

vii From the, "Header & Footer" section, select the, "Yes, I want a **Print Footer**" option.

Note: select the, "No Print Footer for me" option if you prefer printed material not include a footer.

viii Select the information fields to **brand** your Agent Footer.

Note: branding fields are pulled from the, "Information" tab (see, "Information" in the, "Portal Set-Up" section of this Guide).

ix Choose a **color theme**.

E Customize your footer color theme by either typing a specific hexadecimal number directly into the textbox or by clicking the color bar and choosing one from the chart.

Save Header & Footer Configuration

x Click the, "**Save**" button to update any changes.

Note: click the, "Reset Branding to defaults" to restore your defaults.

2c **CMA Cover Sheet:** manage how you would like your contact information to appear on a CMA cover page. Click on the, "Override" checkbox to override any associated pre-populated infomration then click, "Save".

2d **Email Signature:** add your photo, text as well as any links then click the, "Save" button to include this signature on all outgoing messages sent by you, or on your behalf, from Matrix.

2e **Agent Webpage:** your own professional webpage that's integrated with IDX search functionality and hosted on the Matrix web server.

Activation

i Select the, "**Enable Agent Web Page**" radio button to activate your webpage and allow visitor access. Click the, "**Disable Agent Web Page**" option to prevent visitors from accessing your site.

ii The, "**Web Page URL**" is the address where visitors will find your site. You may update your name in the textbox provided (alpha numeric characters only. No spaces.).
Note: this is the URL that you will share with others (if you prefer to use your own domain name, see, "Additional Domains" below).

iii Add a, "**Web Page Title**" that will appear in the browser's tab.

Homepage Content

iv Add a, "**Title**" that will appear above the content on your website's "Welcome Page".

v   Click inside this area and use the associated, "Rich Text Box" buttons to add, "**Content**" to your webpage.

vi   Select which profile information you would like to include from the, "Portal Profile" section.

> **Note:** for more information, see, "Portal Profile" under, "Settings" in the, "My Matrix" section.

Map Area

vii   Configure how the map should be used on your website.

> **Note:** for more information see, "Map Area" under, "Settings>IDX Configuration" in the, "My Matrix" section.

Other Options

viii   Select this checkbox if you would like to include a Sign-Up form for your website visitors then add an optional, "Sign-Up Message" (welcome or, perhaps, informational).

> **Note:** visitors who submit this form will appear in the, "Contact Requests" widget on the Matrix Homepage (see, "Contact Requests" under "Home Widgets" in the, "Home" section).

Additional Domains

ix   If you currently own a domain name and you would like to use it to replace the default, "Web Page URL" (see above) in the Address bar, simply add your domain in the textbox provided then click the, "Add" link.

> **Note:** you must ask your domain registrar to redirect visitors from your domain to your Agent Web Page (your domain registrar is the company that sold you your domain name). If you administer your own domain, you must set up the redirection yourself. Simply forward your domain to your website at the, "Web Page URL" (see above).

Save

x   Click, "Save" on the Button Bar to save your work and, if enabled, activate your website.

> **Note:** preview your site before going live by clicking the, "Preview" button.

> **Note:** view your live site by clicking the, "View Site" link that will temporarily appear below the Matrix menu.
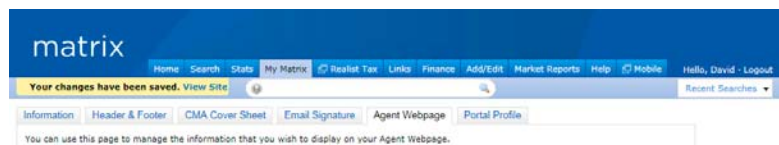
2f **Portal Profile**

i Click any closed **panel bar** to show the contents of that panel.

> **Note:** click the open panel bar to, once again, hide the content.

ii Check any panel to **make its content visible** in the, "My Agent" section of the Client Portal.

> **Note:** un-check this panel to hide its contents from the, "My Agent" section of the Client Portal.

iii Click the, "**Photo**" panel to add a photo.

> **A** Click the, "**Change photo**" link to update your photo.

iv Click the, "**About Me**" panel to add a bio or, perhaps, a short message to share with your customers.

v Click the, "**Inventory Slideshow & Links**" panel to choose whether to share selected listings with your customers.

> **Note:** listings will appear in the, "My Agent" section of the Client Portal as an automated slideshow with a button to view all.

vi Click the, "**Video**" panel to embed a video to share with your customers.

> **C** From YouTube, click the, "Share" option then copy/ paste the video URL into Matrix's, "YouTube URL" textbox.

vii Click the, "**Contact Information**" panel to enter contact information to share with your customers.

> **Note:** contact fields are pulled from the, "Information" tab (see, "Information" in the, "Portal Set-Up" section of this Guide).
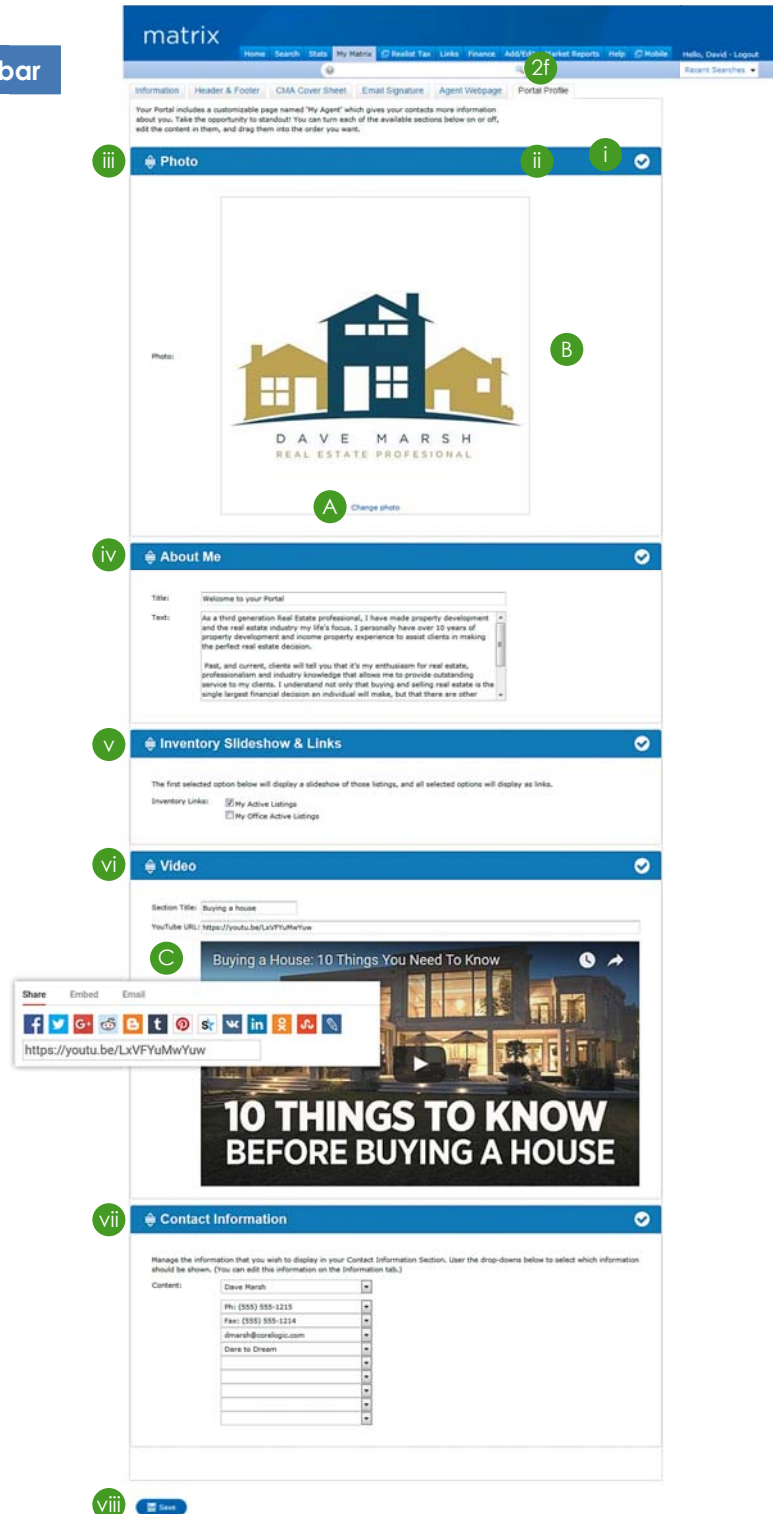
ⅷ Click the, "**Save**" button.

ⅸ **Open** a Client Portal to review your changes.

> **Note:** My Matrix > Contacts > [expand a contact] > Open Portal.

3 **Speed Bar Shortcuts**: manage existing Speed Bar shortcuts by clicking on your custom shortcut name.
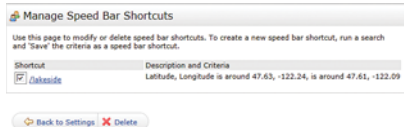
> **Note:** for more information, see, "Speed Bar Shortcut (Create)" in the, "Search" section.

4 **Team Settings**: manage team members by allowing them to create new listings, send CMA's, Reports, and email under your identity or just to work on your behalf.

> **Note:** customize your team name by entering it in the, "My team name" textbox (optional).

> **Note:** team members may switch their identity by hovering, then selecting, their new one in the dropdown beside the, "Logout" link.

5 **Custom Displays**: from the, "Available Columns" listbox, first select which fields you would like to appear on your custom results display, name your custom display, then click, "Save".

> **Note:** additional columns such as a checkbox, feature icons and listing address can be selected from the, "Special Columns" section.

> **Note:** view your custom display by selecting it from the, "Display" dropdown list on the, "Results" tab (see, "Search Results" in the, "Search" section).
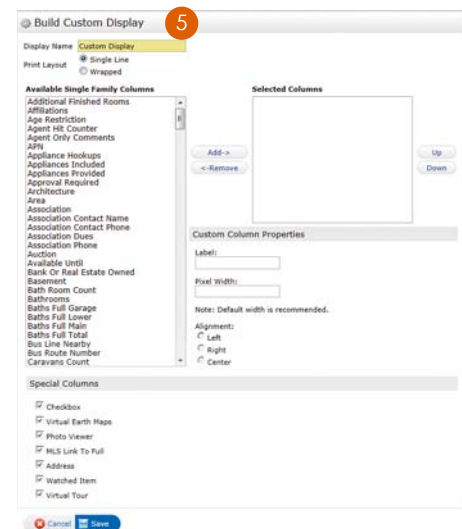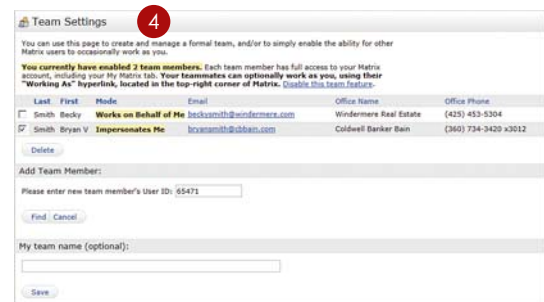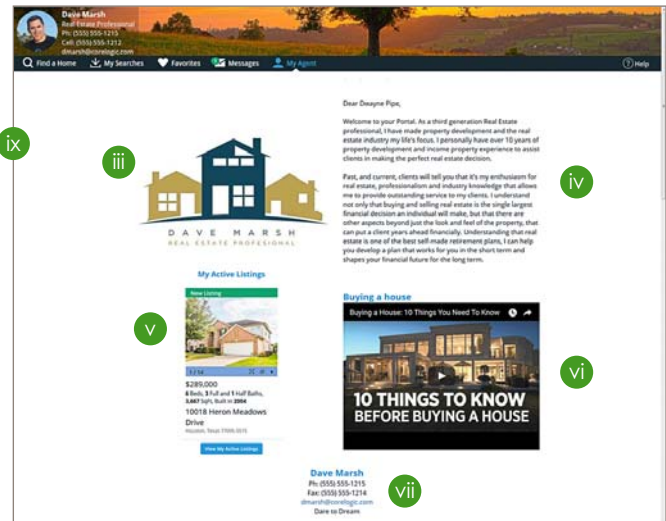
6 **Custom Exports**: export specific fields from your selected listing(s) to a .csv file.

6a From the, "Manage Custom Exports" page, click the, "Add Export" button.

6b From the "Available Fields" listbox, select which field(s) you would like to export.

6c Identify each column in your .csv file by including the field name or label (optional).

6d Name your custom export.

6e Click, "Save"

**Note:** non-printable columns, such as icons, cannot be exported

Note: generate your custom export by selecting the listing(s) in your, "Search Results" then click, "Export" on the Button Bar (for more information, see, "Export" under, "Search > Results" in the, "Button Bar" section).
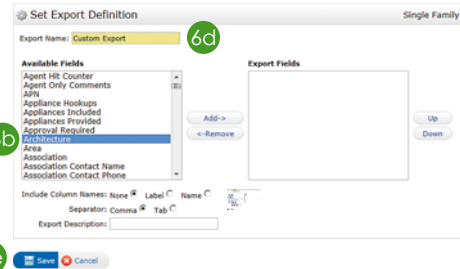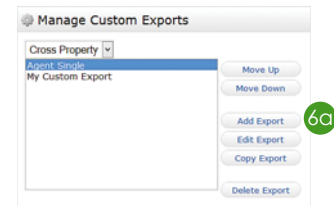
7 **Portal Notification Settings**

7a From the Matrix top menu, hover over the, "**My Matrix**" option then click, "Settings".

7b Click the, "**Portal Notification Settings**" link to set how and when, you would like to receive Client Portal notifications.
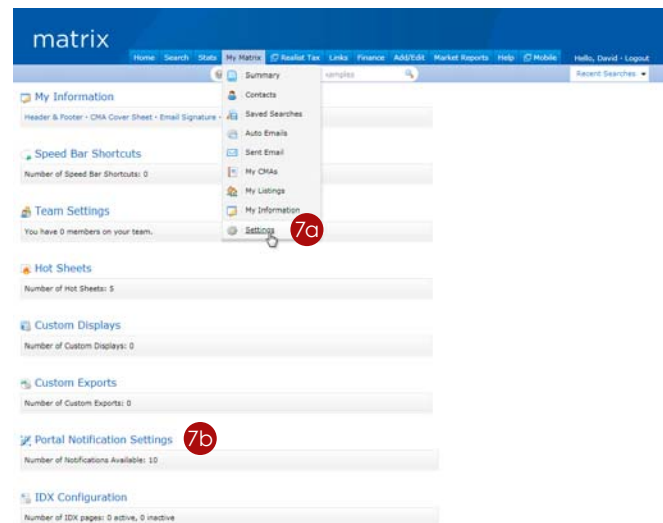
Configure Notification Settings

i **When a contact does this:** the action taken by the Client in their Portal Options: Visits Portal, Saves a favorite, Adds Notes, Saves a Search, Visits Portal First Time.

ii **Notify me ASAP via Email:** select a checkbox if you would like to be notified—via email—of the associated Client action.

iii **Notify me ASAP via Text:** select a checkbox if you would like to be notified - via text message—of the associated Client action.

A Click the, "**Click here to edit your cellular information**" link to add/edit your phone number and to select your cellular provider.
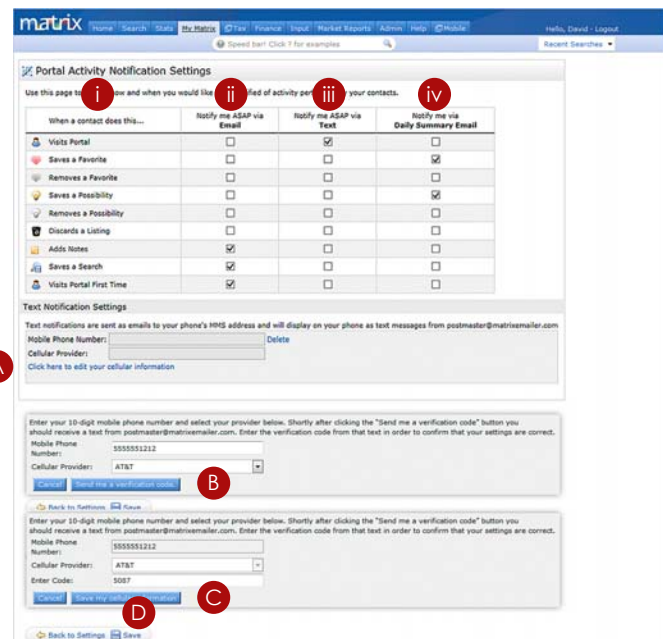
B Once your phone details have been entered, click the, "**Send me a verification code**" button.

Note: some mobile carriers may send you an initial text requiring you to first confirm that you would like to accept, "Email to SMS" messages.

C Check your mobile device then, back in Matrix, enter the **verification code** that was received.

Note: be sure to read the entire text message to ensure you have entered the correct verification code.

**D** Click the, "**Save my cellular information**" button.

iv Click the, "**Save**" button to save your Portal Notification settings.

8 **IDX Configuration**: short for, "Internet Data Exchange", add Listings and Search capabilities to your website by inserting an iframe into any existing webpage.

8a From the Matrix top menu, hover over the, "**My Matrix**" option then click, "Settings".

8b Click the, "**IDX Configuration**" link to set how the IDX search should appear on your website.

8c From the **IDX Configuration** section, either select the name of an existing IDX page to manage or click, "Create a new IDX page" then add a unique name for the one you would like to create.
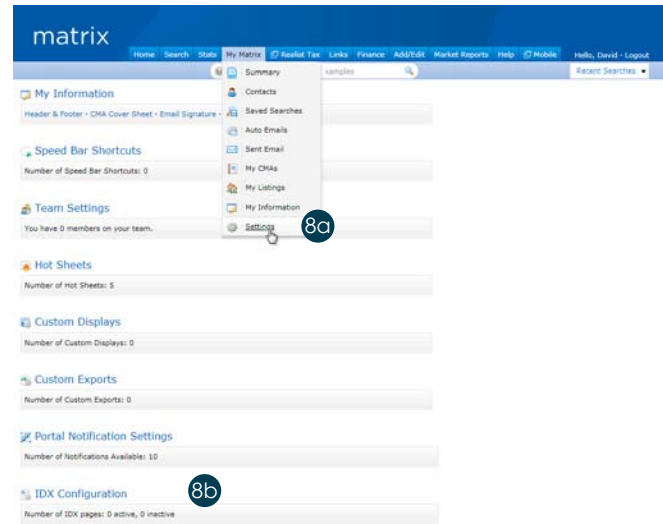
8d **Form Selection:** choose one of the following IDX forms to include on your website.

Search: select the, "Search" option then, from the, "Search Form" dropdown list, choose which Search Criteria form to display on your webpage. If available, select how you would like your results displayed by choosing from the, "Display" dropdown list.

My Listings: select the, "My Listings" option then, from the, "My Listings Query" dropdown list, which listings to display on your webpage.

Map Search: select the, "Map Search" option then, from the, "Search Form" dropdown list, which Search Criteria form to display with the map.

8e **Map Area:** when including a Map Search IDX on your webpage, specify if you would like to set any search area restrictions or an initial map view.

> **Note:** the, "Map Area" section will appear only when the, "Map Search" option (in the, "Form Selection" section) is selected.
>
> **Do not specify a map area:** select this option to remove any restrictions placed on where a user may search on the map.

> **Restrict searches to a specific map area:** select this option to restrict users from searching outside the map area that you specify. Click the, "Set Map Area" link to open the map then, from the map, select a shape tool to select an area. Delete the area by hovering over the shape's red dot then click the, "Delete Shape" link. Your selection also sets the initial map view.
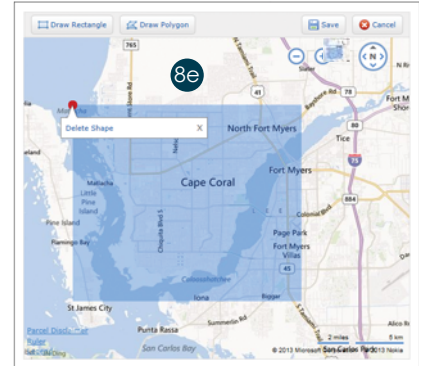

> **Specify an initial map view. Users are free to search outside this area:** select this option to set the initial map view. Click the, "Set Map Area" link to open the map then, from the map, select a shape tool to select an area. Delete the area by hovering over the shape's red dot then click the, "Delete Shape" link. Users may still search outside the selected area.

8f **Activation:** activate, or disable, the IDX on your website.

> **IDX Enabled:** display IDX on your webpage.
>
> **IDX Disabled:** hide IDX from your webpage.
>
> **HTML:** copy and paste the generated <iframe> directly into your webpage. If you're unfamiliar with coding, simply create a webpage by saving the following example text as, "myidx.html" (be sure, however, to replace the <iframe> with the one that was generated in Matrix).

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01//EN"
"http://www.w3.org/TR/html4/strict.dtd">

<html xmlns="http://www.w3.org/1999/xhtml">
<head>
   <title>My IDX Page</title>
</head>
<body>
<iframe src="http://mymls.com/Matrix/public/IDX.aspx?idx=xxxxxx"
width="860px" height="520px" frameborder="0" marginwidth="0"
marginheight="0"></iframe>
</body>
</html>
```

> **Referring Page:** the page that referred visitors to your IDX.

8g **Other Options:** offers additional IDX functionality depending on which IDX form is selected.

> **Style:** when selecting, "Search" or, "My Listings" from the, "Form Selection" step, you are offered the following style options to help integrate the IDX with your website's color scheme.
>
> Click a box to select a color or enter the specific hexadecimal color code.

> **Sign-Up Form:** when selecting, "Map Search" from the, "Form Selection" step, you are offered the option to allow users to sign up, from your website, as a new Matrix contact.
>
> Select the, "Include Sign-Up Form" checkbox then either use the default sign-up message or write one of your own.

8h Click the, "**Preview**" tab to display how your Search, Listings or Map IDX will appear on your webpage.

8i Use the **Button Bar** to delete the current IDX or click, "Save" to create a brand new one.

Stats

Stats (Preset)

1. From the Matrix navigation menu, hover the, "**Stats**" tab and select any of the **Property Types**.

2. Select the, "**Presets**" tab.

3. Click a **Preset statistic link**.

4. Select criteria from the, "**Search**" tab.

   Note: when running a regular search (see, "Criteria Search" in the, "Search" section), click, "Stats" on the Button Bar for a quick way of viewing statistics using criteria that you have already entered.

5. Click the, "Expand" ▼ icon to, "**Save a Copy**" of this Preset (optional).

   Note: a "Copy of" Preset will appear under the, "My Presets" heading.

   Note: customize or add search criteria then save your updated preset (for more information, see, "Stats (Save)" in the, "Stats" section).

6. Click, "**Generate**".
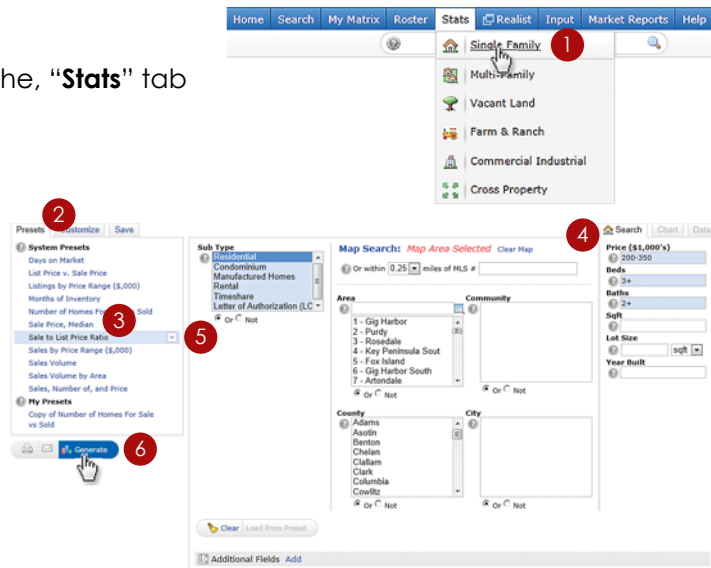
Stats (Customize)

1. From the Matrix navigation menu, hover the, "**Stats**" tab and select any of the **Property Types**.

2. Select the, "**Customize**" tab.

3. Select a, "**Time Frame**" from the dropdown list.

4. Select a, "**Statistic**" from the dropdown list.

5. Click the, "Advanced Options" link to select a, "**Secondary Statistic**" from the dropdown list.

   Note: you must first select a statistic before the, "Advanced Options" link is enabled.

6. Select a, "**Group By**" item from the dropdown list.

   Note: you must first select a statistic before the, "Secondary Statistic" dropdown box appears.

7. Add a, "**Chart Style**" (optional).
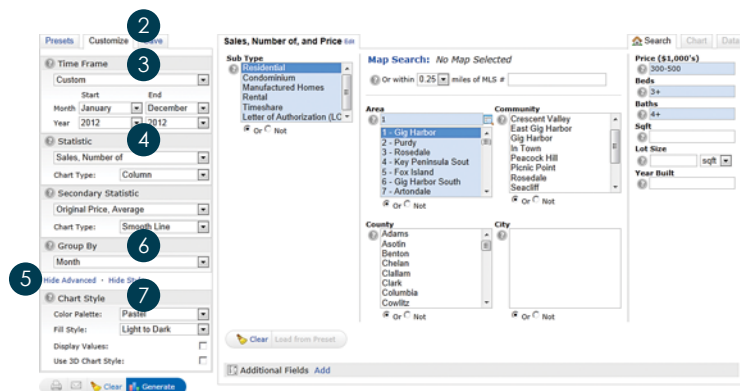
8 Select criteria from the, "**Search**" tab.

> **Note:** when running a regular search (see, "Criteria Search" in the, "Search" section), click, "Stats" on the Button Bar for a quick way of viewing statistics using criteria that you have already created.

9 Give your statistic a **Name** (optional).

10 Click, "**Generate**".

> **Note:** click the, "Chart" tab to view the statistics chart or click the, "Data" tab to view just the numerical data.
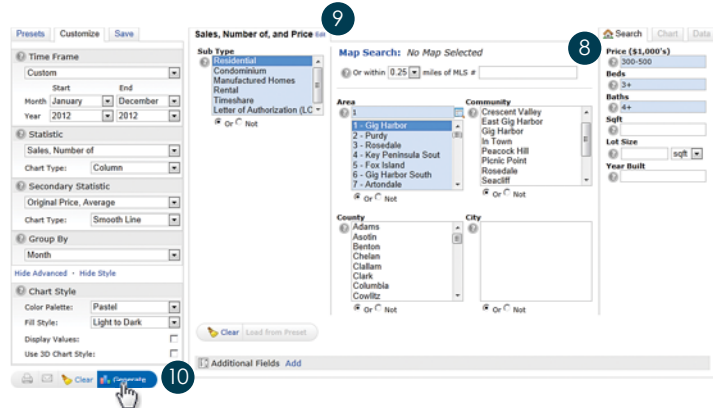
Stats (Save)

1 After choosing a Preset or a Customized stat, select the, "**Save**" tab.

2 Give your statistic a, "**Name**" (optional).

3 Check, "**Save Search Criteria with Preset**" to save the statistic(s) and the criteria together (optional).

> **Note:** when clicking this from, "My Presets" on the, "Presets" tab, you will have the option of running this with, or without, the saved criteria.
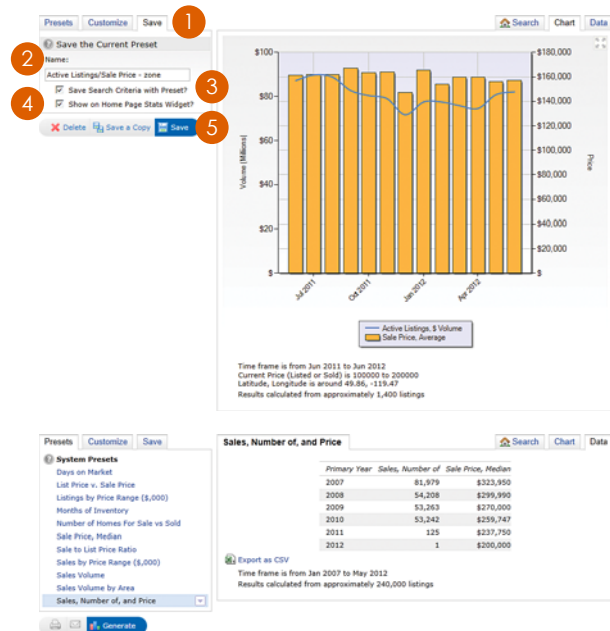
4 Check, "**Show on Home Page Stats Widget**" to save this statistic for quick access on the Home Page Stats Widget (optional).

> **Note:** you must check the, "Save Search Criteria with Preset" checkbox to include this on the Home Page Stats Widget.

5 Click, "**Save**".

> **Save a Copy:** make a duplicate of the current stat.
> **Delete:** delete the current Preset stat.

Auto Email

Auto Email (Create)

1 Create a **Search** and view the results.

Note: for more information, see the, "Search" section.

2 From the, "Results" or, "Map" tab, click, "Save > **New Auto Email**" on the Button Bar.

3 **Recipients**

3a Select a, "**Contact**" from the dropdown list (mandatory).

Note: click the, "Create a New Contact" link to add a contact not yet in your address book.

3b Select, "BCC" to be notified when your customer is sent a new Auto Email.

4 **Messages**

4a Enter a Subject line (mandatory).

4b Use the default, "**Welcome Email**" and, "**Recurring Email**" or customize the text to create your own messages.

Note: click the, "Settings" icon ⚙ to either set your custom message as the new default or to reset it back to the system default.

5 **Settings**

5a An Auto Email, by default, automatically sends a client new, or updated, listings at whatever interval is selected in the, "Schedule" option.

Enable, "Concierge Mode" if you would prefer to review (approve or reject) each listing first before they are sent to the client (optional).

Note: when Concierge is enabled, click the, "Also send me the alert notifications by email" option to be notified, by email, that there are listings waiting for your approval in Matrix.

Note: Matrix alerts you of any new matches in the, "Concierge" Widget on the Homepage (for more information see, "Concierge" under, "Home Widgets" in the, "Home" section.) as well as on each page, in the information bar, located just below the menu tabs..

5b Select an additional display to include in the Client Portal.
Note: this display will only be available, to the client, for the Auto Email with which it was selected.

5c Click the, "Reverse Prospecting" checkbox to allow listing agents to view when their listing has been sent to this customer.
Note: this feature can also be enabled in the contact's management area (see, "Contacts (Add) in the, "My Matrix" section).

6 **Schedule**

6a **ASAP:** Emails are sent as soon as possible.

Daily: Emails are sent during the days, and time period, selected.

Monthly: Emails are sent on the first day of the month.
Note: Auto Emails that are not read within a system-specified period of time are automatically suspended until re-enabled by the agent.

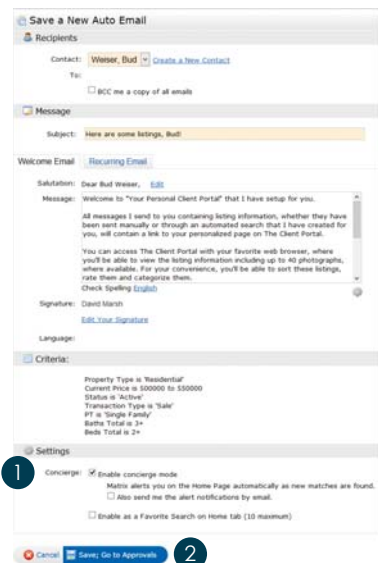**7** Click, "**Save**" to create this Auto Email.
Note: if, "Concierge Mode" is enabled, this button takes the agent to the Concierge area where listings can be accepted or rejected.

Concierge Mode

1 Click checkbox to enable, "**Concierge**" Mode.
Note: when Concierge Mode is enabled, you are no longer able to, "Schedule" when Auto Emails are sent.
Note: notification of new listings waiting for approval can be found in the, "Concierge" widget located on the Home Page as well as to the left of the, "Speed Bar" textbox on each page.
Note: click the, "Also send me the alert notifications by email" checkbox if you would like to also be notified by email of new listings waiting for approval.

2 Click, "**Save; Go to Approvals**" to review listings.

3 **View** if/when a listing has already been sent.
Note: listings that have never been emailed to this client display, "Never" while listings that have will display their date sent.

4 **Select/deselect** single, or multiple, listings to send.
Note: for more information, see, "Search Results" in the, "Search" section.

5 Click, "**Approve Selected**" on the Button Bar.
Note: if no listings are selected, the, "Approval" link on the Button Bar will give the option of approving all.

Button Bar

Button Bar

1 Search > **Criteria**

Clear: removes all current search criteria.

Count-on-the-fly: displays a real-time number of matches based on the current search criteria.

Search: switches view to results and displays properties based on the current search criteria.

2 Search > **Results** and, Search > **Map**

2a **Action Tab**

Criteria: return to the, "Criteria" tab.

Email: email the selected properties.

Print: using the selected properties, print reports, displays and mailing labels.

> **i** Include a **header, footer** (or both) and, with Matrix 360 Displays, print all **tabs** or just the ones you specify.
>
> **ii** Click the, "Preview" button to position, and print, the selected properties on an **interactive Multi-Map**.

CMA: use the selected properties as comparables in a CMA.

Directions: create custom, turn-by-turn driving directions using the selected properties.

Stats: quickly create tabular stats using the properties or, de-select all properties to create chart stats using the current search criteria.

Export: export your selected properties as a .csv file using either System-defined or Custom fields (for more information, see "Custom Exports" in the, "My Matrix" section).
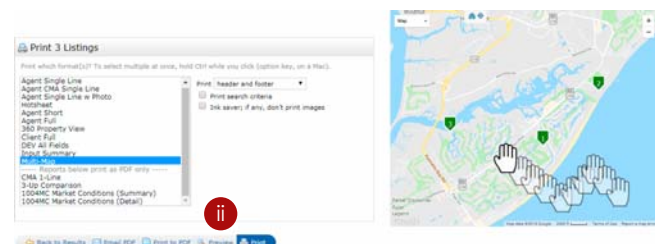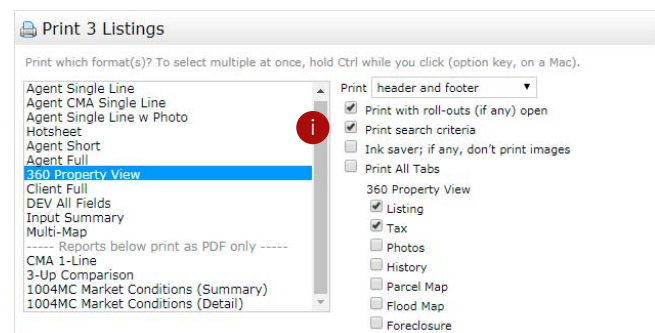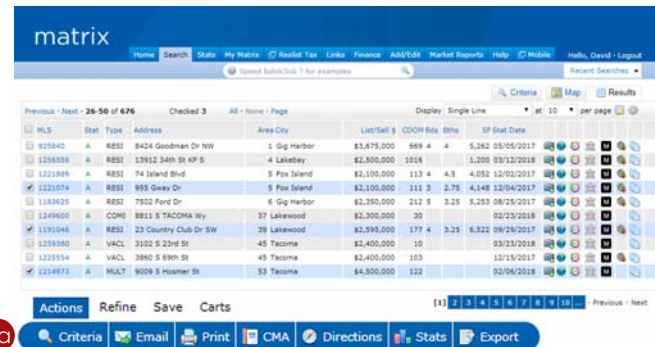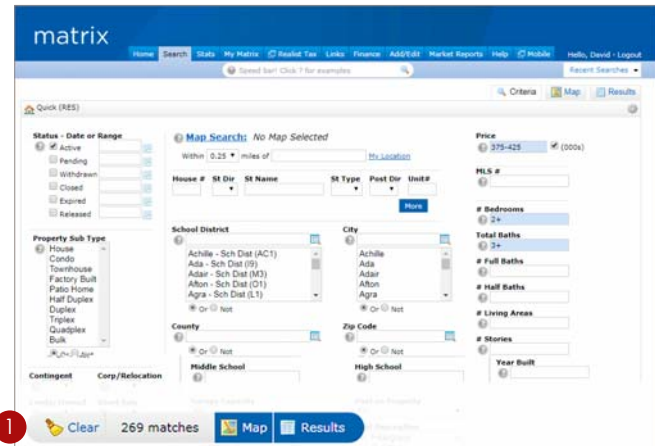
2b **Refine Tab**

View as: select a name from the dropdown list to display when any of the properties, in the results, were sent to the selected contact.

Narrow: displays only the selected properties (click the, "Original Results" breadcrumb link (located below the Speed Bar) to return to all properties).

Discard: removes selected properties (click Un-Discard to undo this action).

Sort: sort your Single Line Display by groups according to the sort fields chosen.

2c **Save Tab**

New Saved Search: save your search criteria to use again for a general search or for a specific contact. You may also include your search to use as one of 10 favorites on the, "My Favorite Searches" Home Page widget (access all saved searches under, "My Matrix > Saved Searches").

New Auto Email: automatically send listings, based on the selected search criteria, to a specific contact at scheduled times (for more information, see, "Auto Email (Create)" in the, "Auto Email" section).

New Speed Bar Shortcut: create a custom Speed Bar Shortcut based on the current search criteria to use in the Speed Bar. Access all saved Speed Bar Shortcuts under, "My Matrix > Settings > Speed Bar Shortcuts" (for more information, see, "Speed Bar Shortcut (Create)" in the, "Search" section).
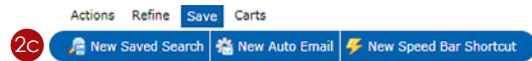
2d **Carts Tab**

**Add to:** add selected properties to a specific contact's (or, Cross Property) cart.

View: view the properties contained in the cart displayed on the dropdown list.

Button Bar

1 My Matrix > **Contacts**

1a **Add/Inactivate/Delete**

Add: add a new contact.

Set Inactive: set selected contact(s) to inactive. You may not deactivate a contact with active auto emails.

Delete: permanently delete selected contact(s) and their history.
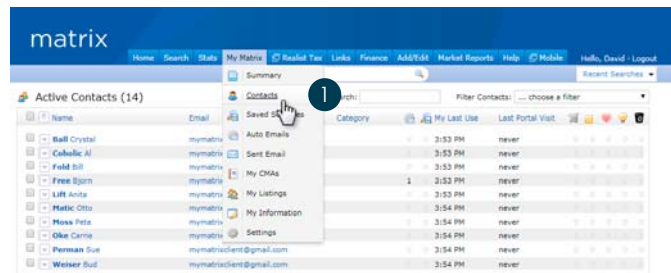
1b **Show/Import/Export**

Show (X) Active: display only active contacts (disabled when already viewing active).

Show All (X): display all active and inactive contacts (disabled when no inactive contacts).

Show (X) Inactive: display only inactive contacts (disabled when already viewing inactive or when there are no inactive).

Import: import a contact .csv file created with Matrix Contact Export.
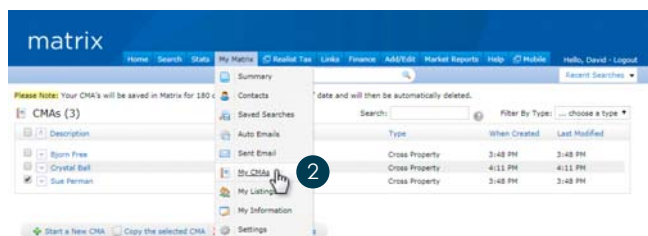
Export: export selected contact(s) to a .csv file.

2 My Matrix > **CMA**

Start a New CMA: create a brand new CMA.

Copy the selected CMA : make an exact copy of one selected CMA.

Delete the selected CMAs: permanently delete selected CMA(s).

3 My Matrix > **My Listings**

Note: select a listing to enable Button Bar functionality.
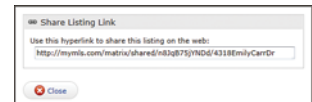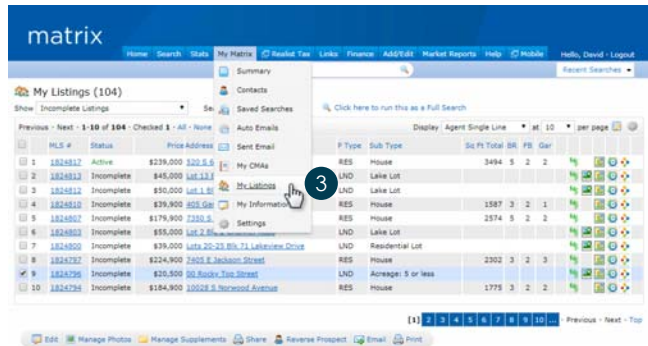

3a **Edit:** edit the selected listing (see, "Listing (Edit Existing)" in the, "Input" section for more information).

3b **Manage Photos:** add, remove or re-order listing photos (see, "Photos and Supplements (Add New)" in the, "Input" section for more information).

3c **Manage Supplements:** add, remove or re-order listing supplements (see, "Photos and Supplements (Add New)" in the, "Input" section for more information).

3d **Share:** copy the URL to display the selected listing, for example, on a webpage or, perhaps, your favorite social media site.

3e **Reverse Prospect:** view agents with clients who have been sent Direct, or Auto, Emails that include your selected listing.

Agent Name: click the Agent's name to send them an email from Matrix.

Ref #: this is the reference number that the listing agent may use to identify which client received the selected listing. The recipient's agent can find this reference number under, "My Matrix > Contacts".

Pre-approved: displays a checkmark if the contact has Mortgage Pre-approval.

Note: flags can be set for each contact (for more information, see "Contacts (Add)" in the "My Matrix" section).

Count: indicates the number of listings returned in a search that match the client's criteria.

Email address: click the Agent's email address to send an email from your default mail client.

Date Sent: indicates when the contact was notified of the listing.

File Folder Icons:

- 💗 displayed if the referenced contact flagged listing as a Favorite
- 💡 displayed if contact flagged listing as a Possibility
- 🗑 **Note:** if the contact discarded the listing—that contact's Agent and Reference Number row will not appear in Reverse Prospecting

3f **Email:** mail the selected listings.

3g **Print:** print the selected listings or create a .pdf.

Input

Listing (Add New)

1 From the Matrix navigation menu, click the, "**Input**" tab.

2 Click the, "**Add new**" link.

3 Choose the appropriate **Property Type** form.

4 Choose **how to fill** the Property form.

Fill From Existing Listing: fill the form from an existing listing. Search by listing number or search for a pre-existing Cross Property listing from which to Fill (for more information, see, "Criteria Search" in the, "Search" section).

Fill From Tax: fill the form using information such as a tax number. If multiple tax results are returned, simply select which tax year you would like to fill from.

Start with a blank listing: fill the form beginning with empty fields.

5 Using the **Input Wizard**, fill the Property form as required.

Note: input wizard section names may vary depending on the Matrix system.

Note: all highlighted Matrix Input fields are mandatory and must be completed before you are able to submit the listing.

⑥ **Map** your listing.

Located under the, "General" (or similar) section of the Input Wiz[ard], your listing by clicking one of the pin placement options. **Note**: re[gardless] of which option you choose, always visually verify that the map pin is placed directly over where your listing is located (see, "Manually" below).

On Address: once an address been entered either manually or, in some systems, auto filled from a street dictionary, click the, "Map Address" (or similar) link to map the pin with the listing.

On LINC Number: enter the LINC number (available in some systems) then click the, "Geocode on LINC/address" link to map the pin with the listing.

Manually: click the, "Set Lat/Long manually" (or similar) link then, after the map pop-up displays, zoom in for an aerial view (using either the mouse wheel or the zoom ⊖ ⊕ icons). To place the pin, simply left click, with the mouse, on the property.

Google Street View: click the, "Choose Google Street View" (or similar) link then, after the map pop-up displays, use the Google Map directional arrows to choose the best view of your listing. Click, "OK".
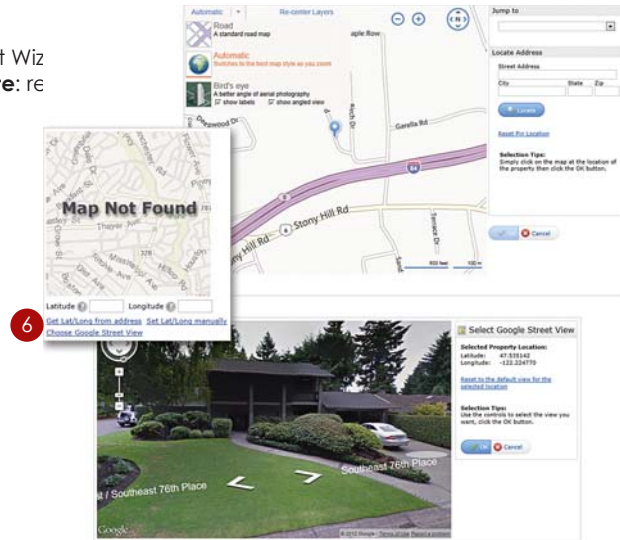
⑦ Click, "Validate", on the Button Bar, to ensure all **required fields have been filled**.

Note: If any errors exist (such as, empty required fields), they will be indicated by an, "Alert" icon ❗ in the, "Input Wizard". To resolve, simply click the offending step and correct the error.
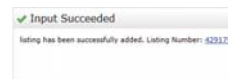
Note: for additional error information, click the error message link to view a detailed summary of specific listing errors.

⑧ On the Button Bar, click, "Save As Incomplete" to complete your listing at a later time (see, the "Save As Incomplete" section for more information) or click, "Submit Listing" to immediately post it live to the system.

Photos and Supplements (Add New)

After your listing has been submitted live or saved as incomplete, you may add photos and/or supplements.

① From the Button Bar, click, "**Add/Edit Photos**" to add listing photos.

①a Click the, "Browse" button to **locate the listing photos** on your hard drive then drag your cursor over multiple images (or CTRL and click individual images) to select the ones you would like to upload.

Note: maximum number of photos vary depending on your system.

Note: for best quality, upload photos that are at least 1024x768 pixels.
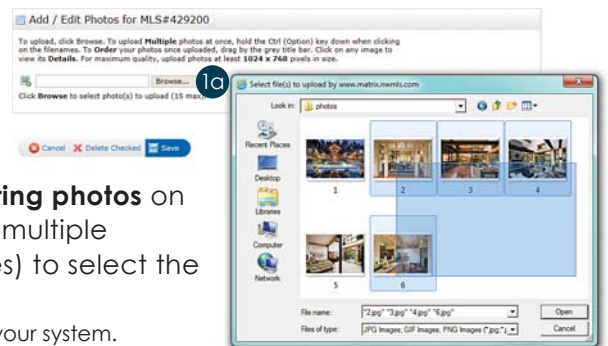
1b Once listing photos have uploaded, click any thumbnail to enlarge the image and add a **photo description** (optional). Click the, "Done" link when finished, followed by, "Save" on the Button Bar.
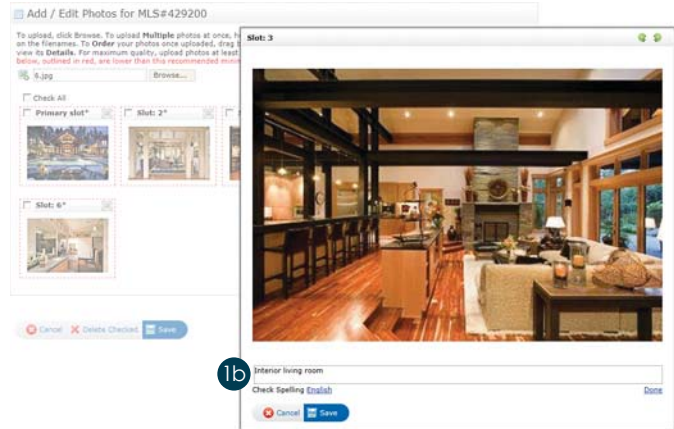
> **Note:** thumbnails outlined in red indicate the image dimensions are smaller than recommended.

1c Click and drag the thumbnail, "Slot: [#]*" **to reorder** the photos as you would like them to appear in the listing.

display as the Primary photo on the listing.

1d Click, "**Saved**" when complete.

2 From the Button Bar, click, "**Add/Edit Supplements**" to add listing supplements (also known as, "Attachments").
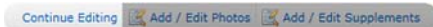
2a Enter a, "**Supplement Description**", choose a, "**Supplement Type**" then click the, "Browse" button to locate the listing supplement on your hard drive.

2b Click the, "**Upload**" button to upload this supplement to the listing.

2c Click, "**Save**" when complete.
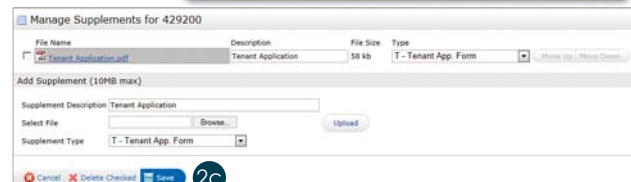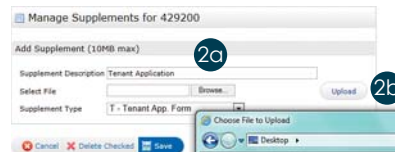
3 From the Button Bar, click, "**Continue Editing**" to return to the Input Wizard.

Note: the, "Primary slot" indicates which image will

Listing (Edit Existing)

1 From the Matrix navigation menu, select the, "**Input**" tab.

2 **Choose a listing to edit** either by clicking the, "Edit existing" link, by selecting a listing from the dropdown list or by entering a listing number in the textbox.
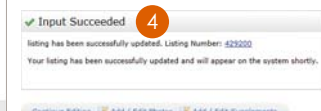
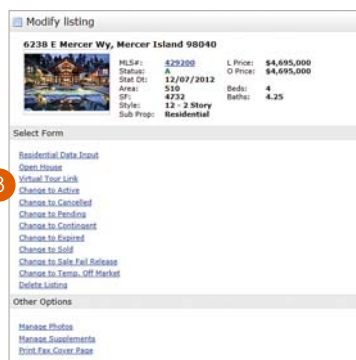**3** Select which **part of the listing to edit**.

> **Note:** click the Property Type link (i.e. Residential, Commercial etc.) to edit any of the fields from the listing.
> **Note:** click the, "Manage Photos" link to update listing photos.
> **Note:** click the, "Manage Supplements" link to update listing supplements.

4 When your **listing has been updated**, click, "Submit listing" on the Button Bar.

Auto Save

❶ Matrix automatically **saves new listings** after several minutes if:

    a. no keyboard input is detected

    b. you navigate away from the Input screen

    c. you switch between Input wizard sections

❷ The Auto-Save Recovery screen will automatically be displayed immediately after you next sign into Matrix.

    Restore: click the, "Restore" link to return to the auto-saved listing and continue from where you left off.

    Discard: click the, "Discard" link to discard any auto-saved changes to the listing and close the auto-save recovery screen.

    Skip: click, "Skip" on the Button Bar to close the auto-save recovery screen (the auto-save recovery screen will once again display the next time you sign into Matrix).
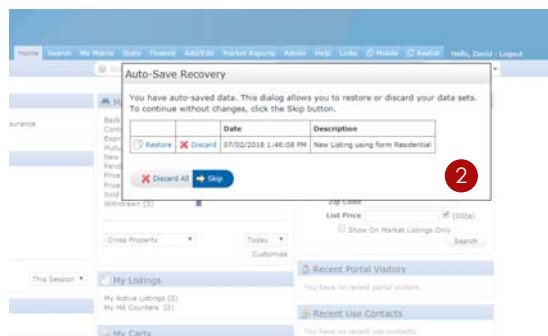
Matrix Mobile

Matrix Mobile is designed as a light, versatile solution to quickly access the system's most essential functions.

Note: custom settings from the desktop version of Matrix are automatically transferred to Matrix Mobile.

Use the following icons to navigate through the sections:

🏠 Home Page		▶ Next Item
🔄 Last Page		◀ Previous Item

1 To access Matrix Mobile, navigate to the Matrix Mobile **Login** page then enter your, "User ID" and "Password".
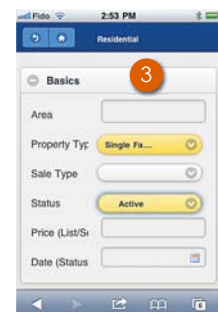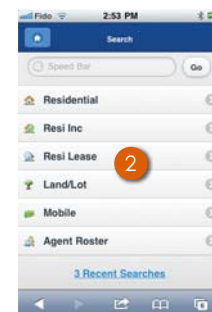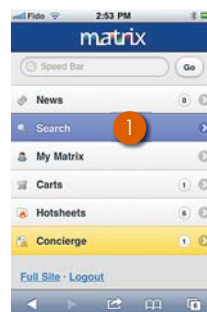
    Note: click the, "Matrix Desktop" link to access additional Matrix features and functionality from the full version of Matrix.
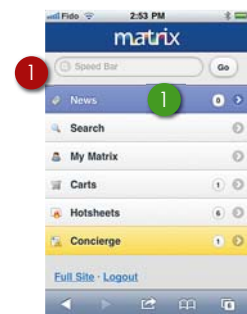
Speed Bar

1 Enter **Speed Bar** shortcut criteria to quickly find listing, or roster, information from the Matrix database.

    Note: shortcuts will automatically populate the Speed Bar following each search created from the, "Search" page.

News

1 From the Home Page, select, "**News**" to view recently posted news items.

Search

1 From the Home Page, select, "**Search**" to enter search criteria for a variety of property types.

2 Select a **Property Type** to search.

    Note: click the, "Recent Searches" link, at the bottom of the page, to view a list of your most recent searches.

3 Enter your **Search Criteria**, scroll to the bottom of the page and click the, "Search" button.

    Note: in the, "Area" textbox, enter an area name such as, "Los Angeles Southwest" (or its numeric equivalent, "C34"). To search multiple areas, simply separate values using a comma (i.e., "C34, 276" or, "Los Angeles Southwest, Highland").

    Note: click the, "Calendar" icon to add a date, or date range, to your search.

    Note: expand any panel with a, "Open" icon ⊙ to enter additional Search Criteria.

4   Click the, "**Email All**" link to send all
    recipients.
    Note: separate email addresses, in the, "To"
    Note: enter a mandatory email subject line.

5   Click the, "**Map**" icon link to view all
    Note: by default, only results of less than 100
    Note: on the map, click the, "down" arrow to
    Note: on the map, click a listing pin to view the

6   **Select a listing** to view the listing details

7   Click a **listing function**.
    Email: click the, "Email" button to email this listing
          to one, or more, recipients.
    Cart: click the, "Cart" button to add this listing to
          a cart.
    Map: click the, "Map" button to view where the
          listing (identified by the large icon)
          is located on a map.

8   Click the primary, "**Listing Photo**" to
    display all listing images.
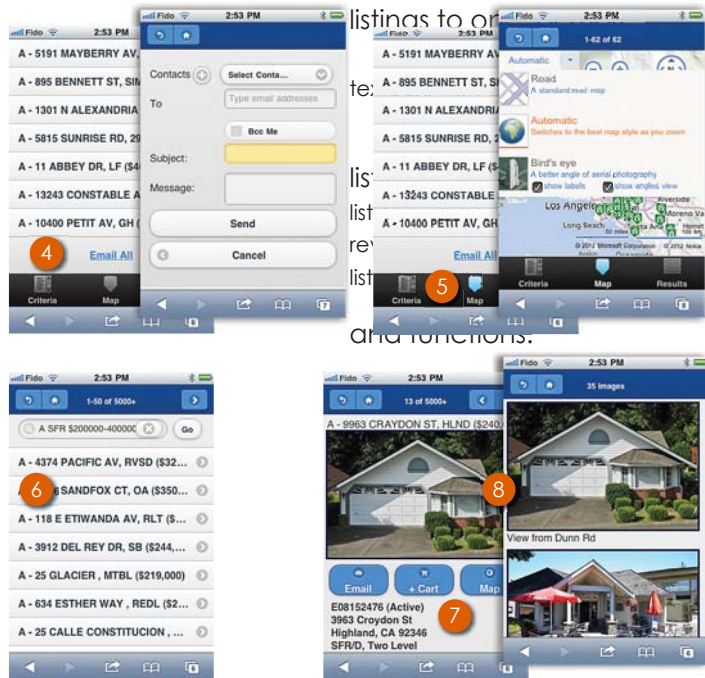
My Matrix

1   From the Home Page, select, "**My Matrix**" to access client information and settings.

2   From the, "My Matrix" page, click,
    "**Contacts**" to view a contact's details
    (including, saved "Auto Emails",
    "Saved Searches" and client portal
    preferences).
    Note: from the, "Contacts" page, click the, "Add
          New" link to add a new contact.

3   From the, "My Matrix" page, click,
    "**Saved Searches**" to view any saved
    searches.
    Note: select a saved search to view the results or change its criteria.

4   From the, "My Matrix" page, click, "**Auto Emails**" to view the auto emails you have created.
    Note: select an auto email to view the
          results, change the criteria or
          display the new listings since the
          last time you ran this search.
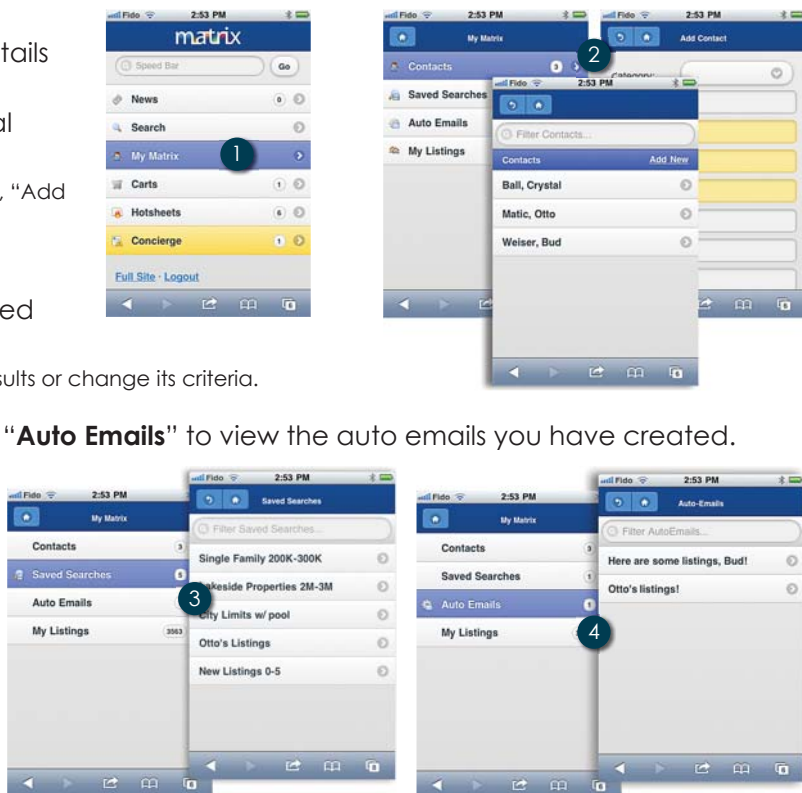
5 From the, "My Matrix" page, click, "**My Listings**" to view your listings.

> **Note:** select a listing to view the listing details and functions.
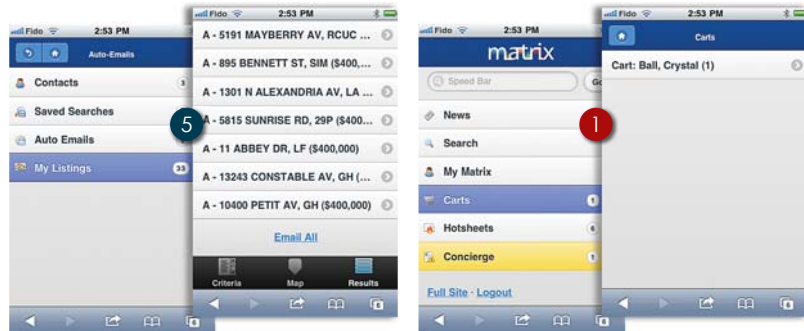
Carts

1 From the Home Page, select, "**Carts**" to view a list of all current carts.

> **Note:** a cart is automatically created each time a new contact is added to the system.
> **Note:** see #7, under, "Search" in the Matrix Mobile section, to add a listing to a cart.

Hotsheets

1 From the Home Page, select, "**Hotsheets**" to view the Hotsheet for each property type.

> **Note:** a customized Hotsheet can only be created from within Matrix.
> **Note:** see #3, under, "My Matrix" in the Matrix Mobile section, to access a Hotsheet that you may have saved as a custom saved search.

Concierge

1 From the Home Page, select, "**Concierge**" to view all auto emails with listings waiting for your approval.

> **Note:** the concierge option, highlighted in yellow, will only appear if there are listings currently waiting for approval.

2 Approve all listings in an Auto Email by clicking the, "**Approve All**" link or access listings to, "**Reject**" by clicking the, "[number of] listings" link (i.e., **13 listings**).

> **Note:** to reject a specific listing, select the listing then click the, "Reject" button.
> **Note:** once all rejected listings have been discarded, click the, "Approve and Send All" link to send all remaining listings to your Auto Email recipient.
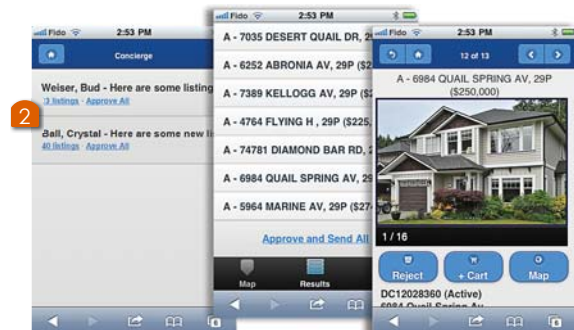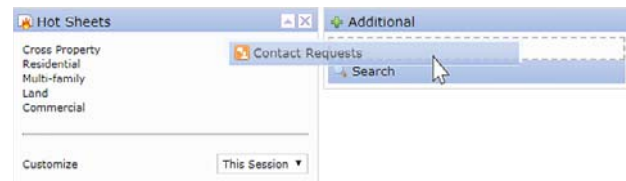
Tips and Tricks

Home Widgets

Prefer your Homepage Widgets were organized differently?

Click a widget header then hold and drag it to a new position on the page.

Click ☒ to close the widget and ▲ to minimize it.
Note: all closed widgets can be found in the, "Additional" Widget.

Market Watch

Looking for real-time changes in your Market?

Click the, "Refresh" link to view up-to-date activity for the selected property type(s) during your chosen timeframe.

Not interested in displaying the activity for the entire system?

Click the, "Customize" link to only show activity in the market that you specify for each Property Type.
Note: for more information, see, "Market Watch (Customize)" in the, "Home" section.
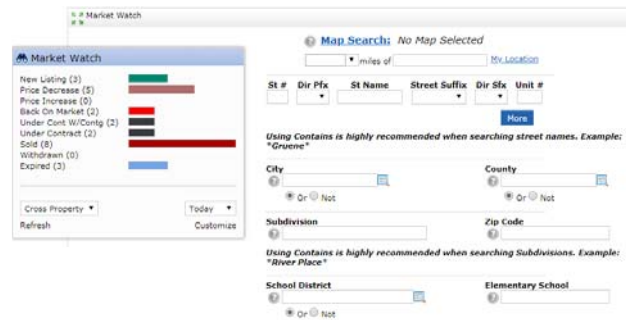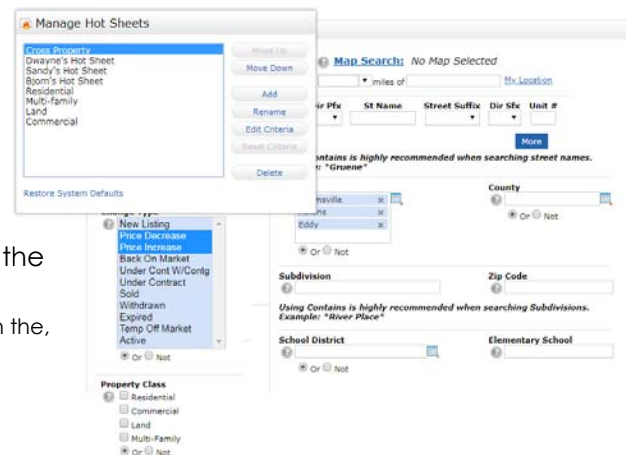
Hot Sheets

You have multiple customers who are each interested in different areas of your market. Would you like to see the activity in each of those areas separately?

Simply customize each Hot Sheet to only show the activity in a specific customer's area.
Note: for more information, see, "Hot Sheets (Customize)" in the, "Home" section.

Criteria Search

Are you constantly having to add the same criteria to many of your searches?

💡 Save commonly-used criteria as a default so that each time you use that search form, your saved criteria has already been entered.
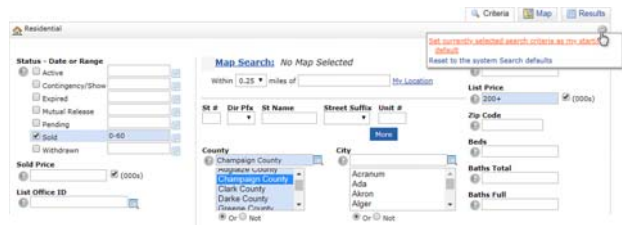
Too many unused criteria fields cluttering up your Search Form?

💡 On systems where available, create your own custom Search form by adding only the Additional Fields that you typically use most often.
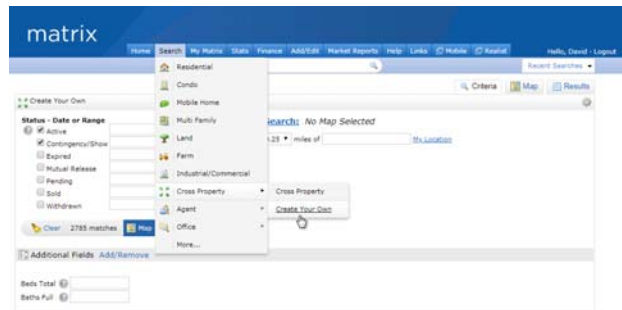
Want to quickly add a date, or date range, to your search?

💡 Use the following date shortcuts to avoid using the calendar.

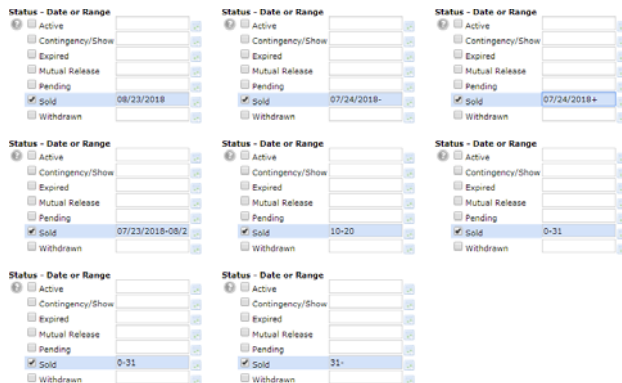| |
|---|
| **Specific date (MM/DD/YYYY):** 08/23/2018 (August 23, 2018) |
| **Before a specific date:** 07/24/2018- |
| **After a specific date:** 07/24/2018+ |
| **Date Range (specific):** 07/23/2018-08/23/2018 (July 23, 2018 to August 23, 2018) |
| **Date Range (dynamic):** 10-20 (between 10 and 20 days ago) |
| **Last 31 days:** 0-31 (0=today) |
| **Last 31 days:** 31+ |
| **Before the last 31 days:** 31- |

Want to enhance your text field searches?

🔅 Use a combination of any of the following symbols, in any text field, to enhance your Matrix searches.

Asterisk (*): a wildcard that can be used anywhere in the text

Public Remarks ❓ `*pool*`   search field for anything **containing** the word, "pool" (what's before or after is irrelevant).

Public Remarks ❓ `reduced*`   search field for anything **starting with**, "reduced" (what's after is irrelevant).

Public Remarks ❓ `*deal.`   search field for anything **ending with**, "deal." (what's before is irrelevant).

Public Remarks ❓ `reduced*deal.`   search field for anything **starting with**, "reduced" and **ending with**, "deal." (what's between is irrelevant).

Exclamation (!): used for exclusion

Public Remarks ❓ `!*pool*`   search field for anything **not containing** the word, "pool" (any other words are acceptable).

Public Remarks ❓ `!reduced*`   search field for anything **not starting with**, "reduced" (starting with any other words is acceptable).

Public Remarks ❓ `!*deal.`   search field for anything **not ending with**, "deal." (ending with any other words is acceptable).

Question Mark (?): character substitute

Public Remarks ❓ `*gre?t*`   search field for anything **containing** a word with the letters, "gre?t" (where, "?" can be any letter).

Comma (,): used to combine

Public Remarks ❓ `*pool*, !*pool ta` search terms search field for anything **containing** the word, "pool" but **not containing** the word, "pool table".

Have a customer who's looking for property within a certain distance of a particular point-of-interest?

🔅 From a criteria form, enter a distance, and the POI address, to isolate all listings within the specified range.
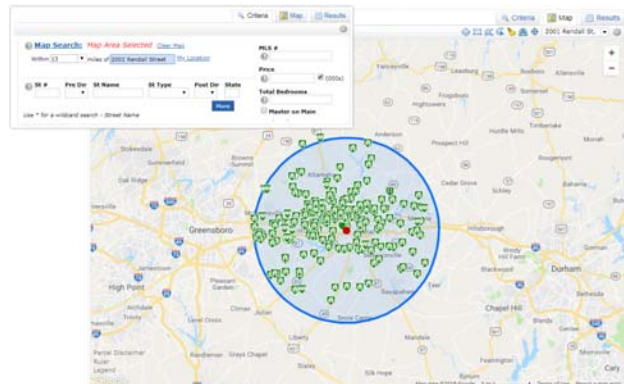
Map Search

Have a customer who's looking for property within a certain distance of a particular point-of-interest?

🔅 From the map, enter the POI address in the, "Jump to address" textbox 🌐☐✂🔍🖐🚩⊕ 2001 Rendall St, ▼ ⚙ click, "Enter" then, starting near the location marker, use the radius tool ◯ to draw and isolate all listings within your preferred range.
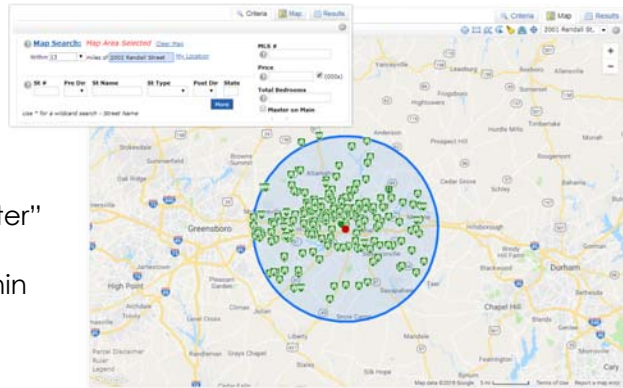
Need to determine the distance between 2 map locations?

🔅 Click the, "Ruler" link (bottom-left corner of map) then click on the first location while dragging your cursor to the second location. Release.

**Tired of having to constantly reposition the map to an area that you typically search most often?**

🔅 Replace the default map position by repositioning the map, clicking the, "Settings" ⚙ icon then saving your current position as the new default.
    Bonus Tip: use the, "Jump To Address" dropdown list to quickly navigate to system-preset areas of the map or back to your default position.
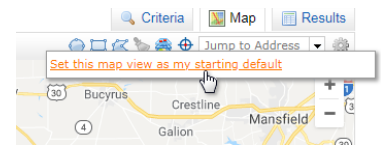
**Do you have multiple properties to select on the map?**

🔅 Save time by using, "Single Checkbox" ☑ icon to quickly select individual properties or the, "Multiple Checkbox" ☑ icon to click and drag over many properties at once.
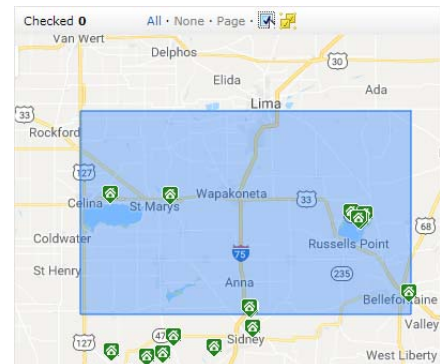
Search Results

**Want to use a different default display when generating search results?**

🔅 From the search results, choose your preferred Display from the dropdown list then click the, "Settings" ⚙ icon to set it (plus the current sort order and, "per page" count) as your new default.
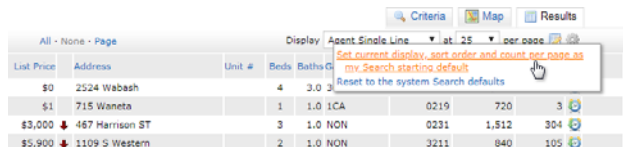
Do you, or your customer, only want to view certain information printed on your Agent Single Line?

🔅 Customize a Grid by clicking on a column to insert additional fields or resize, reorder, rename and remove the existing ones.
   **Bonus Tip:** for future use, name, and save, your Custom Grid by clicking the, "Manage Display" 🗒 icon.
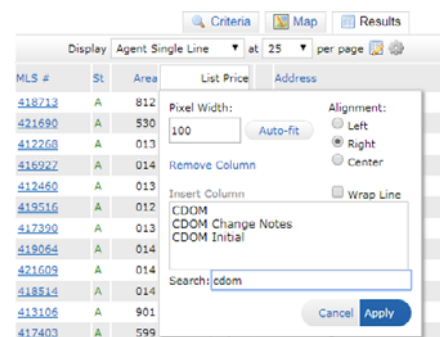
Want to sort results according to distance from a specific point-of-interest?

Use the map radius tool (or Criteria section's POI textbox) to first isolate the listings within a set radius. Then, from the Single Line Results Grid, click the, "Distance" column header to sort how far a listing is located from the center of your radius.
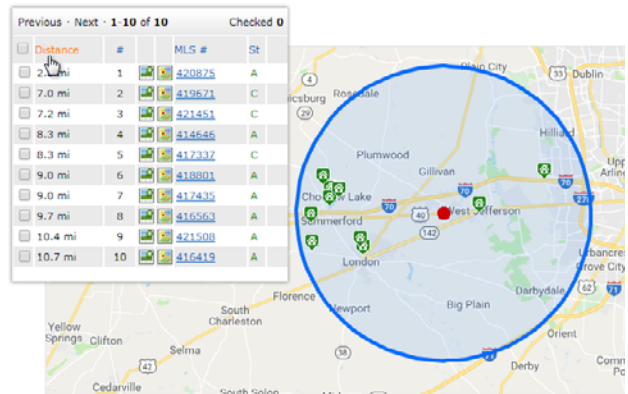
Speed Bar

Looking to quickly create a simple search or change your current criteria on-the-fly?

Use a combination of system, or custom, Speed Bar shortcuts to find results fast.

> **Note:** the following list of shortcuts represent the original Matrix defaults. Click the Speed Bar Help ❓ icon to view shortcut names that may be specific to your system.

421010 420859 419783	**ML Numbers:** enter a single or multiple ML number(s)
A S	**Status:** enter "A" for, "Active", "S" for, "Sold" etc.
DET ATT COM LND MUL RNT LOT	**Property Type:** enter DET, ATT, COM, LND, MUL, RNT, LOT
123 Main Main 123 Ma*	**Street Number and Name:** for a specific address, enter the street number and the exact street name (without the street type). For a general street search, enter just the street name. Use the Wildcard (*) to search street names with unknown spelling.
Seattle	**City:** enter a city name
55555 A5A 5A5	**Zip Code (USA):** enter a 5 digit zip **Postal Code (CDN):** enter 3 characters + space + 3 characters
$650-900	**Price:** enter a price in thousands (represents current price for actives and sale price for solds)
2+ 3+ 2+ 3+ baths	**Bedrooms and Bathrooms:** when used together, bedrooms first then immediately followed by bathrooms. If only searching bedrooms, then no need to add bathrooms. If only searching bathrooms, then you must specify by adding, "baths".
1000-2000 sqft	**Approximate Square Feet:** enter a square footage (sqft)
2-4 acres	**Acres:** enter the number of acres (acres or ac)
oh 08/30/20118 oh 08/30/20118+ oh 0	**Open House:** enter a specific Open House date (oh 08/30/2018), an Open House date range (oh 08/30/2018+) or simply enter "oh 0" for all Open Houses today (0 means today).

Agent Search: enter an Agent's first and last name (agent john smith). Use a Wildcard (*) to take the place of either the first or the last (agent * smith) or any unknown letters (agent j* sm*th)

Combine: combine Speed Bar shortcuts in any order to create more complicated expressions.
> **Note:** each status must be grouped together
> **Note:** when used together, bedrooms must be placed before bathrooms

Want to do a Speed Bar search using a shortcut that doesn't yet exist?

Create your own custom Speed Bar shortcut in 3 easy steps:

1. From any criteria form (or map), use the, "Clear" 🧹 icon to clear everything.

2. Define what you would like to make a Speed Bar shortcut then, from the Button Bar, click, "Results".

3. From the Button Bar, click, "Save" > "New Speed Bar Shortcut" then name your Speed Bar shortcut (beginning with a forward slash (/) and no spaces).
   > **Note:** use your custom Speed Bar shortcut as you would any system Speed Bar shortcut.

Recent Search

Forgot to save an important search, but you don't see it on the, "Recent Search" dropdown list?

Click the, "View All" link - at the bottom of the list - to display a complete list of your most recent 50 searches.
> **Note:** unused searches are automatically removed after 1 week.

Contacts

Need to organize your contacts into specific groups?

From your contacts, click to edit a specific contact then, from the category dropdown list, select a system category or add them to one of your own.

Use the, "filter" option to only show contacts belonging to that group.
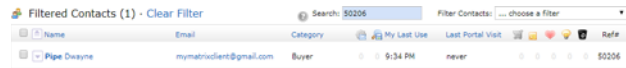
Has a listing agent just run a Reverse Prospecting search and now contacted you with the reference number identifying one of your customers?

🔆 Find the contact fast by entering their reference number into the, "Search" box above your contact list.

Are your customers actually looking at the content you send?

🔆 Quickly view if—and when—a specific customer last visited their Portal under the, "Last Portal Visit" column then click the, "Portal Activity" section to view a breakdown of their most recent activity.
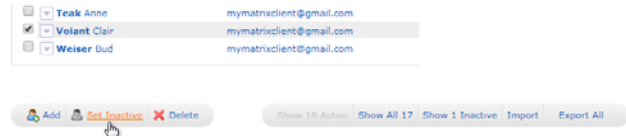
Want to clean up your contact list?

🔆 Hide inactive contacts by selecting a name from the list, then click the, "Set Inactive" button.

Click the, "Show Inactive" button to view or unhide names.

**Note:** customers with enabled Auto Emails cannot be set to, "Inactive"

Saved Search

Tired of looking for a specific contact's saved search?

🔆 Organize saved searches better by associating each of them with a specific customer.

Then, when looking to run a saved search, find it quickly in a specific contact's management section. For a commonly used saved search, consider including it as one of your 10 Favorites in the, "My Favorite Searches" Widget on the Homepage.
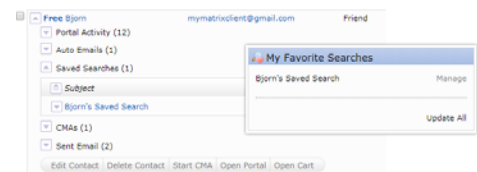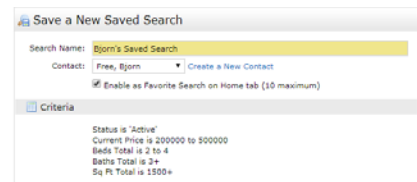
Want to quickly convert a Saved Search into an Auto Email?

🔆 From a Saved Search's Settings page, click the, "Turn this Saved Search into an Auto Email" link. Configure the Auto Email as required.
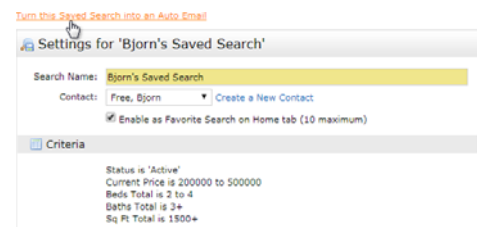
CMA

You've just run a search and found Comparables that you'd like to use in a CMA.

From the Button Bar, click, "CMA" to immediately pull all selected properties into a brand-new CMA.

Bonus Tip: to collect Comparables from multiple searches, click the, "Carts" tab on the Button Bar then, "Add to Cart" to add the selected properties to a specific contact'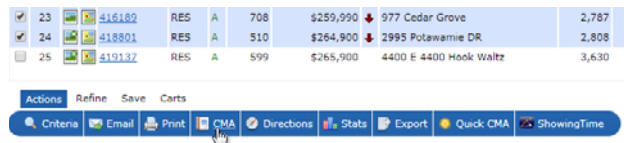s Cart. When you're ready to create a CMA, click the Comparables step of the CMA Wizard, then, from the Button Bar, click the, "Add from Cart" button to load the selected properties.

Want to create a collection of CMA templates to use with different groups of clients?

Start a new CMA, then, from the, "Start" step of the CMA Wizard, name your template accordingly in the, "Description" box (i.e. Template #1).

From the, "Pages" step, select which pages you'd like to add as well as any other steps to include that define this template. Click the, "Save" icon.

Repeat for each new template.

When generating a new CMA for a customer, simply select any template from the available CMA's then click the, "Copy the selected CMA" button to duplicate. Open the copied CMA and, from the, "Start" step of the CMA Wizard, select a contact's name then rename your CMA in the description. Continue building this CMA without affecting the original template.
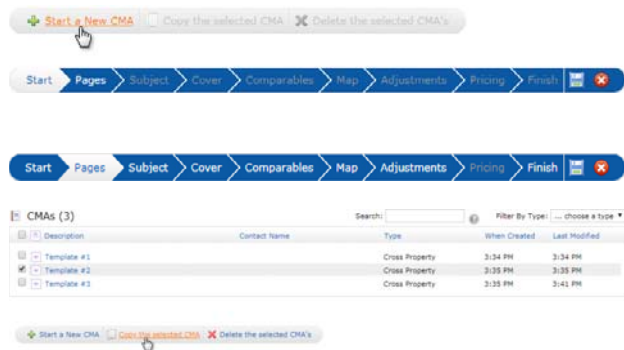
My Listings

Want to include the same Results Button Bar functionality with your own listings?

From the, "My Listings" page, click the, "Click here to run this as a Full Search" link to view all available Search Results Button Bar options to use with your own listings.
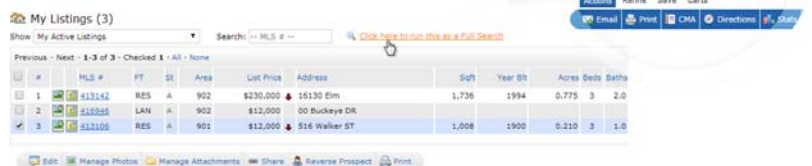
Want to know how many hits your listing has received since, perhaps, a recent price decrease?

From the, "My Listings" section select, "My Hit Counters" from the dropdown list then click an associated value link to see the activity during the specified time period.
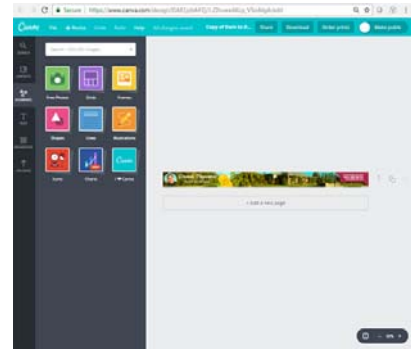
Settings

MY INFORMATION

Looking for an easy way to create your own custom branding for free?

Use www.canva.com to create stunning banners (and more).

It's as simple as building an image in Canva, saving it to your computer then uploading it to Matrix.
Note: CoreLogic is not affiliated with Canva.

EMAIL SIGNATURE

Want to include an image, from the web, in your email signature?

From the, "Email Signature" tab of the, "My Information" section, click the, "Image" icon to add the url of the image stored elsewhere on the web.
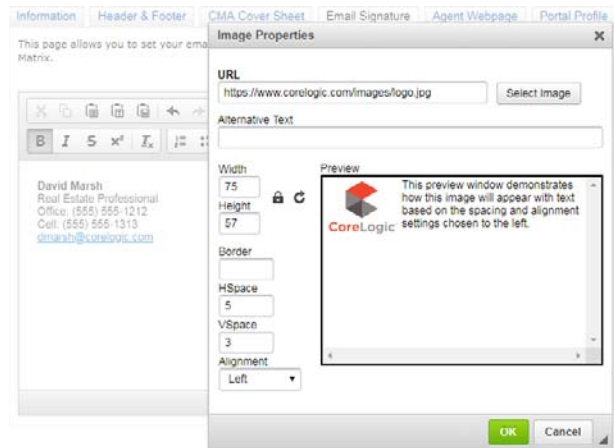
CUSTOM DISPLAYS

Want to quickly build a custom Single Line Grid Display?

Rather than add, remove and re-order Grid columns one-at-a-time within the grid itself, why not manage multiple fields together by choosing to customize your Grid from the, "Custom Display" feature found in the, "My Matrix > Settings" section.
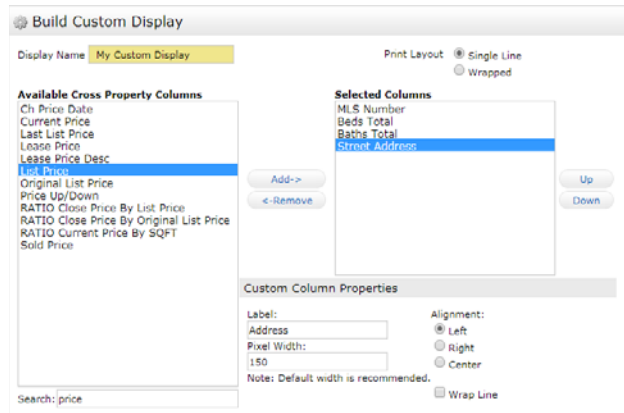
Stats

You've just generated some results and would now like to see some statistics based on the same criteria you used in the search.

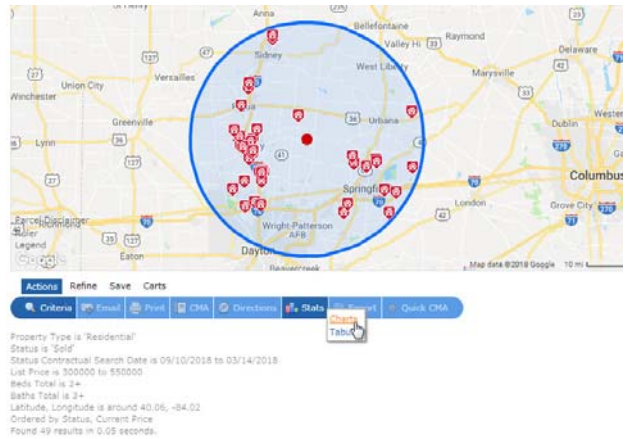🔅 Rather than clicking the, "Stats" tab and having to retype your criteria all over again, simply select the, "Stats" button from the Results Button Bar then click, "Charts" to pre-populate the Stats feature with your original criteria.

**Note:** there must not be any properties selected to use this feature.

Button Bar

ACTIONS > EMAIL

Want to send your customer additional property information that may not be included in one of the Portal's default Displays?

🔅 From the email page, click the, "Additional" link then select a specific Display to send. With this Display now included, customers, from their Portal, can choose to view these sent properties in either the default or the additional Display.

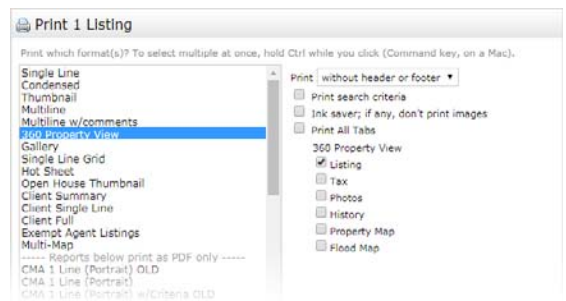**Note:** Additional Displays are not available in all systems.
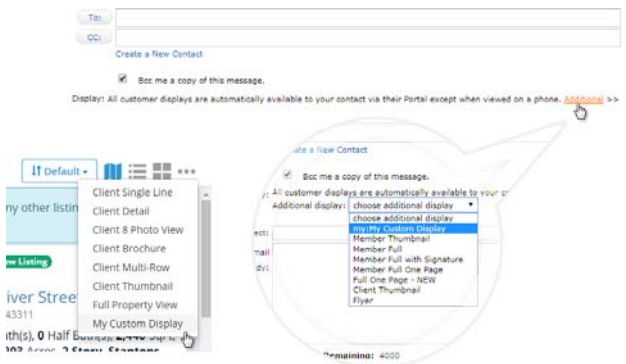
ACTIONS > PRINT
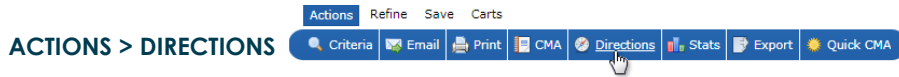
Tired of wasting ink?

🔅 Click the, "ink saver" option to remove images from print or select whether to include branding on your printed material. Finally, when printing Full Displays with tabs, select only the tab(s) that you'd like to see printed.
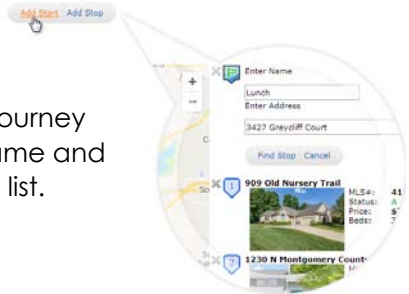
ACTIONS > CMA

🔅 See, "CMA" in the Tips and Tricks section of this Guide.

ACTIONS > DIRECTIONS

Actions Refine Save Carts
🔍 Criteria ✉ Email 🖨 Print 📄 CMA ⊘ Directions 📊 Stats 📤 Export ☀ Quick CMA

Want to include a scheduled stop for lunch or, perhaps, another event during your driving tour?

💡 From the Driving Directons page, add custom locations to your journey by clicking the, "Add Start" (or, "Add Stop" button), type in a name and address then click and drag the new location to reorder it in the list.
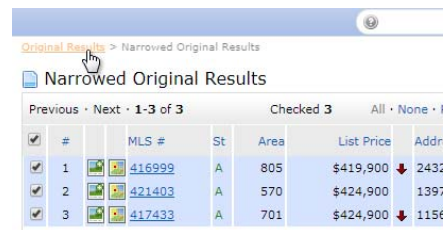
ACTIONS > STATS

Actions Refine Save Carts
🔍 Criteria ✉ Email 🖨 Print 📄 CMA ⊘ Directions 📊 Stats 📤 Export ☀ Quick CMA
Charts
Tabular

💡 See, "Stats" in the Tips and Tricks section of this Guide.

REFINE > NARROW

Actions Refine Save Carts
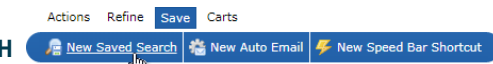View as Select a Contact ▼ ▶◀ Narrow ⊘ Discard 🔀 Sort

Did you just narrow your search results but now want to return to the original list?

💡 Simply click the original search name in the breadcrumb located above your results.

Original Results > Narrowed Original Results

📄 Narrowed Original Results

Previous · Next · 1-3 of 3   Checked 3   All · None ·

✔	#		MLS #	St	Area	List Price	Addr
✔	1	📷🔲	416999	A	805	$419,900 ↓	2432
✔	2	📷🔲	421403	A	570	$424,900	1397
✔	3	📷🔲	417433	A	701	$424,900 ↓	1156

SAVE > NEW SAVED SEARCH

Actions Refine Save Carts
🔲 New Saved Search ⚙ New Auto Email ⚡ New Speed Bar Shortcut

💡 See, "Saved Search" in the Tips and Tricks section of this Guide.

SAVE > NEW AUTO EMAIL

Actions Refine Save Carts
🔲 New Saved Search ⚙ New Auto Email ⚡ New Speed Bar Shortcut

Want to send your customer additional property information that may not be included in one of the Portal's default Displays?
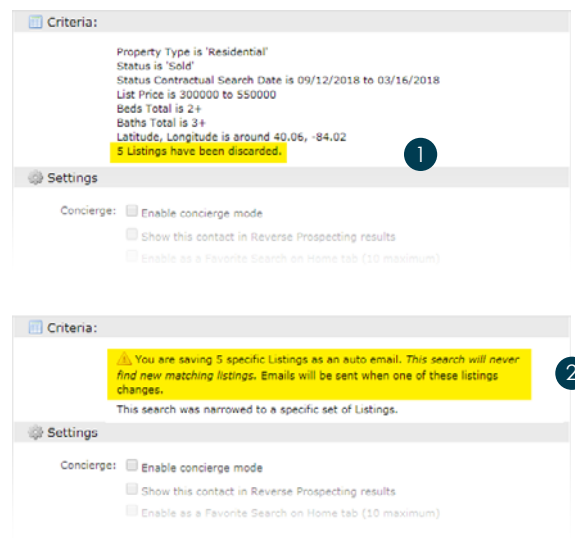
💡 See, "Button Bar > Actions > Email" in the Tips and Tricks section of this Guide.
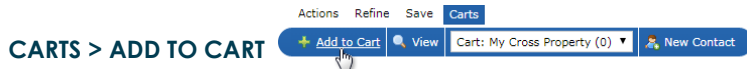
Need to remove specific properties from being sent in an Auto Email ... but don't want to enable Concierge?

💡 First, generate a search then select the listings that you'd like to filter.

① To remove the selected listings from ever being sent with this Auto Email in the future, click, "Refine" on the Button Bar, then click, "Discard". With the listings now removed, click the, "Save" tab then click, "New Auto Email. Configure as desired.

② To send future Auto Email updates on just the selected listings, click, "Refine" on the Button Bar, then click, "Narrow". With only the narrowed listings remaining, click the, "Save" tab then click, "New Auto Email. Configure as desired.

📋 Criteria:
Property Type is 'Residential'
Status is 'Sold'
Status Contractual Search Date is 09/12/2018 to 03/16/2018
List Price is 300000 to 550000
Beds Total is 2+
Baths Total is 3+
Latitude, Longitude is around 40.06, -84.02
5 Listings have been discarded.   ①

⚙ Settings

Concierge: ☐ Enable concierge mode
            ☐ Show this contact in Reverse Prospecting results
            ☐ Enable as a Favorite Search on Home tab (10 maximum)

📋 Criteria:
⚠ You are saving 5 specific Listings as an auto email. This search will never find new matching listings. Emails will be sent when one of these listings changes.   ②
This search was narrowed to a specific set of Listings.

⚙ Settings

Concierge: ☐ Enable concierge mode
            ☐ Show this contact in Reverse Prospecting results
            ☐ Enable as a Favorite Search on Home tab (10 maximum)

CARTS > ADD TO CART

Want to add CMA Comparables from multiple searches?

Add selected properties from each Comparables search into a customer's Cart. When you're finally ready to create their CMA, from the, "Comparables" step of the CMA Wizard, click the, "Add from Cart" button and choose which properties you'd like to use.
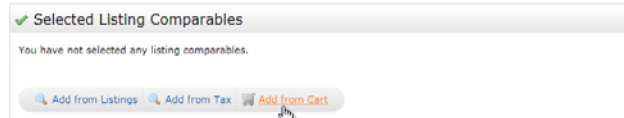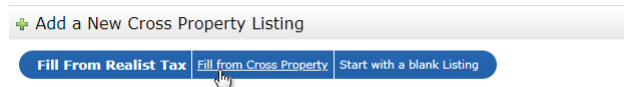
Input (Add/Edit)

Are you listing a property that's similar - or the same - as one you've listed before?

From the Input section, select the, "Fill from" option to pre-populate the Input form with many of the same fields used in your previous listing.

Multiple Tabs

Want to run multiple searches at once while, perhaps, building a CMA at the same time?

Though not officially supported by Matrix, most modern browsers allow users to right click and open a link in a new tab or window. To multitask in Matrix, rght-click any of the Matrix menu items then select to open that page in a new window or tab.

Note: you cannot input multiple listings, in multiple tabs/windows, at the same time. Only add 1 listing at a time.
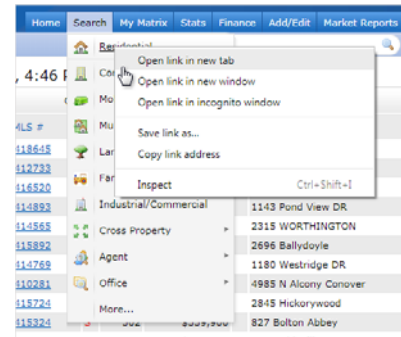
Tired of having to constantly type the Matrix login page URL into your smartphone?

Why not add a Matrix quick-launch icon to your mobile device's home screen.

ANDROID

1 From your device, open the Chrome browser and navigate to your Matrix login page.

2 Tap on the three dots ⋮ in the upper-right corner. This will open a menu. In this menu, click the "Add to Home screen" option.

3 Name your shortcut (i.e. Matrix Login).

4 Click, "Add".
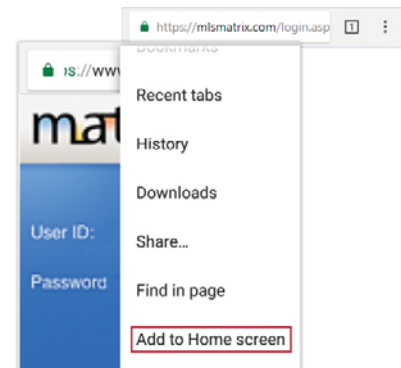
IPHONE

① From your device, open the Safari browser and navigate to your Matrix login page.

② Tap the "share" ⬆ button on your browser's toolbar. This will open a menu. In this menu, click the "Add to Home screen" option.

③ Name your shortcut (i.e. Matrix Login).

④ Click, "Add".
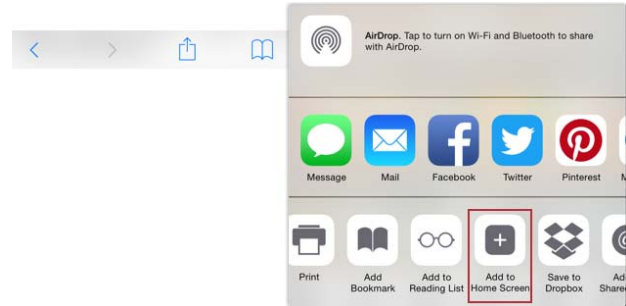
FOR MORE INFORMATION PLEASE VISIT

corelogic.com/matrixhelp

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