Matrix MLS System - Training Manual

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Introduction

Matrix is a flexible and robust Internet-based system that has the following features:

- **Search Listings** – Search on different property categories plus cross properties.
- **Print listings** – Print a variety of different reports including Customer Flyers.
- **Contacts** – Store your contacts and notes regarding client information.
- **Map Directions** – View and Print out Map directions from property to property
- **Emailing** – Email listings, auto-email listings, or CMA's. Email history for emails sent out and if they have been read by your client.
- **Comparative Market Analysis (CMA's)** – Create CMA style reports that include
  colorful graphics and charts. Incorporate marketing material into your CMA's.
- **Input Listings** – Input listings either by starting from scratch, auto-populate by cloning an old listing or auto-populate by using property detail from county records.

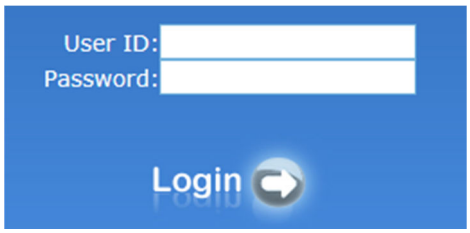
You can connect to Matrix from any computer with an Internet connection from anywhere, at anytime using DSL, ISDN, Cable Modem, or dial-up phone line.

Chapter 1: Login and Logout of Matrix

Logging into Matrix

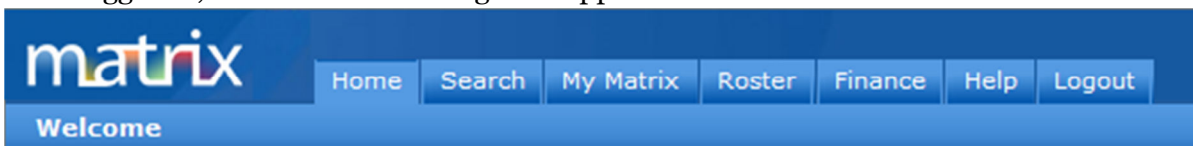
Open your Internet Browser and in the address line type matrix.realcomponline.com

The next screen you will see is the Matrix Login page.



Type your **User ID** and **Password**. Click on the **Login** button or press Enter on the keyboard.

Once logged in, the Matrix Home Page will appear as described below



(**Note:** Your name and the date will appear in the right-hand side of the title bar. This will display the contact information that appears on all reports generated from Matrix)

Logging out of Matrix

To log out of Matrix simply click on the

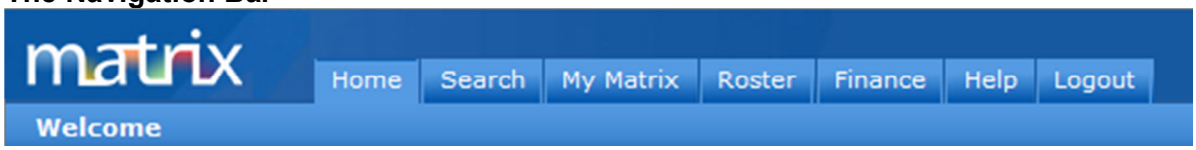
link at the right of your Matrix menu bar.
Note: Matrix times out within a given period and you will be automatically logged out if no actions have been performed during that period. The length of this period is typically set to at least 30 minutes, depending on the security requirements of your organization. While a loner timeout period is more convenient, it is less secure.

Matrix Navigation Overview

The Header
At the top of the Matrix screen, you will see the Header. The Lehigh Valley logo will appear on the left. As mentioned above, your name and the date will appear on the right.

The Tabs
The Tabs allow you to navigate through the different sections in Matrix.

The Navigation Bar



Under each Tab there is a Navigation bar containing links. These Links allow you to access other sections within a particular Tab.

Home – The Home tab contains current news and information that your MLS board wants you to know. There are also useful links and a calendar of upcoming events that may be of interest to you located on the right hand side bar of the Home Page. This page links to Your Hot Sheets and Hot Searches as well.

Search – The Search Tab is used to search for listings in the MLS using Property Category searches and different search types.

My Matrix – The My Matrix tab serves as your personal briefcase from which you can view your Saved Searches, My Listings, Contacts, E-Mail History, Custom Displays, Custom Exports, CMA's and Settings.

Roster – The Roster tab enables you to look up contact information for other agents or offices.

Finance - The Finance tab gives you access to various browser-driven Financial calculators ranging from Home and Personal Financing to Investment and Retirement calculations.

Input - The Input tab provides you with easy access to your listings. In this tab you may insert new listings, report status changes, upload photos, virtual tours, etc. (**Note:** Access to this tab depends on your security level set by your brokerage. Please contact your brokerage or Board Staff for more information)

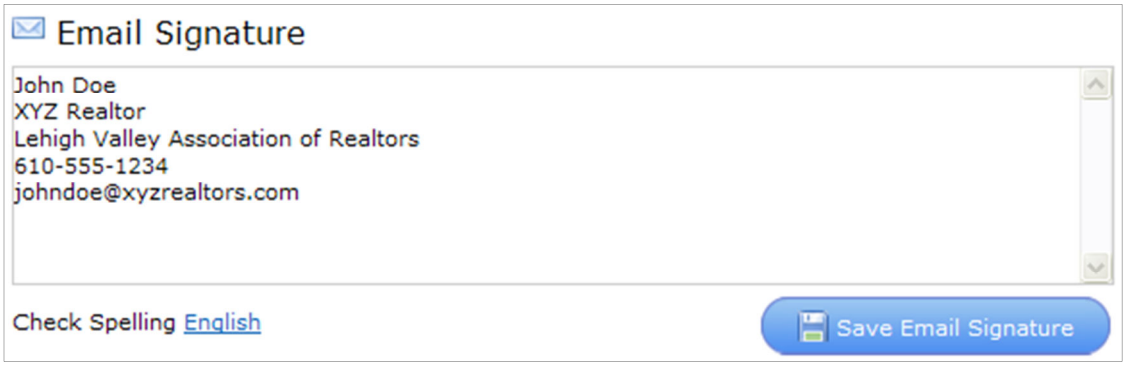
Help – The Help tab contains an FAQ (Frequently Asked Questions) section where you can find the answers to the most commonly asked questions. Online maps are also found under this tab.

· Logout – Logout is a link to the far right of your screen. Always use it to help ensure the security of your information.

Chapter 2: Settings

Creating your Email signature

The Settings link under the "**My Matrix**" Tab is where you can personalize your email signature.
Your email signature will appear at the bottom of all the emails you send from Matrix.
You can save your name and contact information in this section so that you will not have to type it in each time you send an email.
Follow these steps to enter or modify your email signature:
1. Click on My Matrix tab.
2. Click on the Settings link.
3. Type or modify your email signature
4. Click on the Save Email Signature button.



Headers and Footers

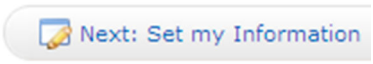
You can set up a header and footer for personalizing your printed displays and reports.
NOTE: The header and footer templates will not show up on Agent Reports.
1. Click on the My Matrix tab.
2. Click on the Settings link.
3. Click on the Header & Footer link.

You will then be taken to the Header/Footer Packages page, where you can choose from an assortment of pre-made templates. Select the desired template and click on the Next: Set my Information button.
This will take you to a page where you can customize the details that will be displayed in the header/footer package. Examples include your name, slogan, and contact information. You can also submit a photo of yourself at the bottom of the page. To preview the appearance of your header and footer, click Preview Press Save to save your changes. You can click the Cancel button at any time to exit the existing page without saving the changes. If you previously enabled a Header/Footer template but want to disable it, simply return to the Header/Footer Packages page, and select "*I choose not to use a header/footer at this time*". Press Save to confirm the changes.

Upload custom header/footer images

To upload your own customer header and footer images,
1. Click on the My Matrix tab.
2. Click on the Settings link.
3. Click on the

link.

4. Click Upload custom header/footer images (2nd option), then press 

.

From here you can Browse and upload your own custom images to be displayed for your template. Any header and footer images you create must be resized to the recommended size shown on the page (Required image size: 745 x 85 pixels). When satisfied, press

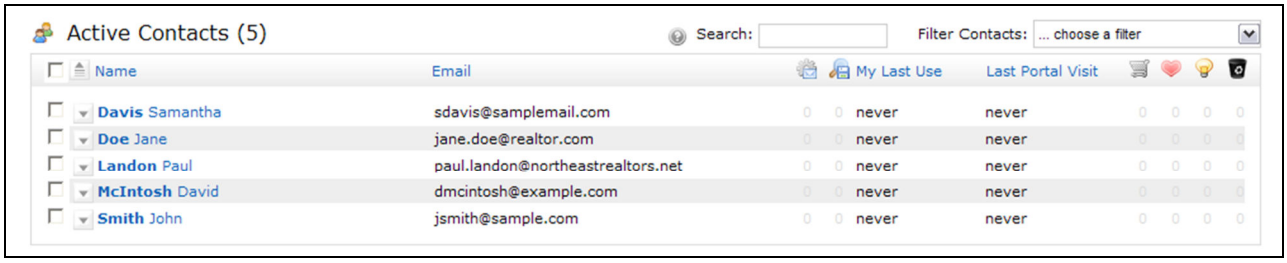
.

Chapter 3: Contacts

"**Contacts**" is like an address book of your clients contact information. You'll be able to Email, Auto Email, attach to Watched Listings and Save Searches for your contacts. You will also be able to see if your clients have read their Auto Emails.

Contacts: List, Sort and Search

Click the My Matrix tab, and then click the Contacts link to open a list of all your Contacts.

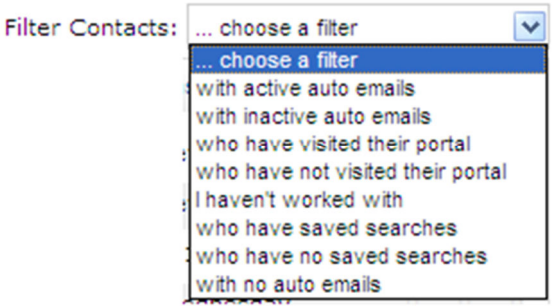


Columns from left are the Select box, Name, Email Address, number of Auto-Emails, number of Saved Searches, my last use (activity) for that Contact, the Contact's last Portal visit, number of listings Contact has marked in their Portal as Favourites, number marked as Possibilities, and number Discarded.

Click any column header to sort all your Contacts by that field (default sort is by last name). If you have a very long list of Contacts, start typing the Contact's name in the Search box at the top. As you type, your Contacts list will narrow to match what you type.

Contacts: Using Filters

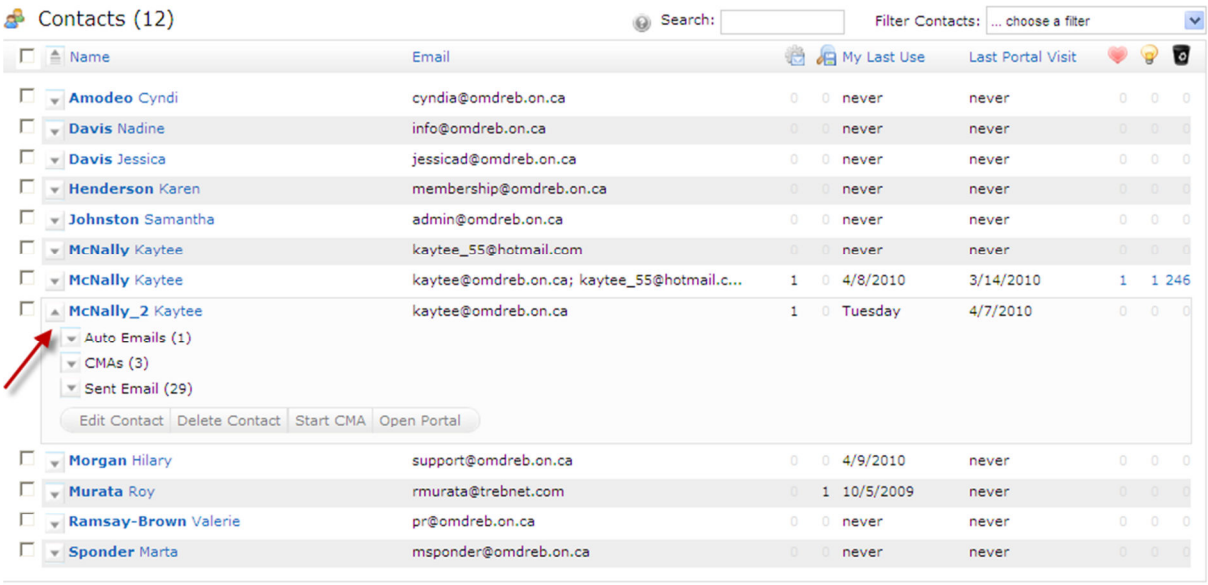
Filters are a great way to narrow your Contacts list according to a specific criterion. Click on the Filter Contacts drop-down box located in the top right hand corner and then select one of the options:



For example, select "*who have not visited their portal*" to see who you may want to call to find out why they are not viewing their listings. All of the filters are great for targeting your follow-up activities.

Contacts: Working With

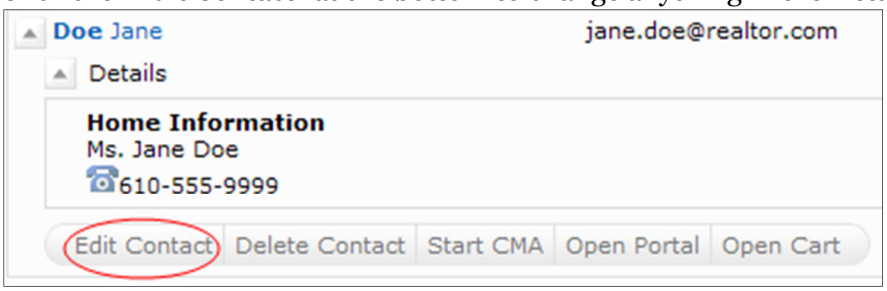
To expand a Contact and view/edit all items assigned to that Contact, click the Contact's Name or the triangle to the left of the Contact's name.



Here you have access to the Contact Details, Auto-Emails, Saved Searches, CMAs and Sent Emails. Click the triangle next to the section you want to work with.

Details:

Click the "Edit Contact" at the bottom to change anything in the Details section.



Deleting Contact

To delete contact(s), follow these steps: Note: Any Watched Listings attached to a contact will also be deleted

1. Select the check box to the left of the edit button.
2. Select the Delete button.
3. Click on OK button to confirm the deletion.

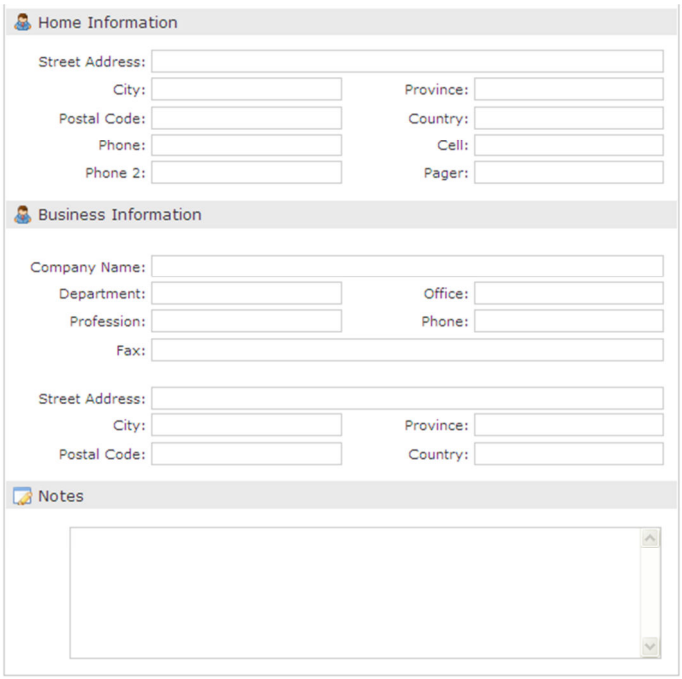
Adding a Contact

To Add a contact follow these steps below:

1. Click on the Add button at the bottom of the screen
2. Fill out the information in the Personal Information pop up box. All Yellow fields are mandatory fields and must be filled out in order to save the contact.

3. If desired click on the

button to fill out more information on that client.

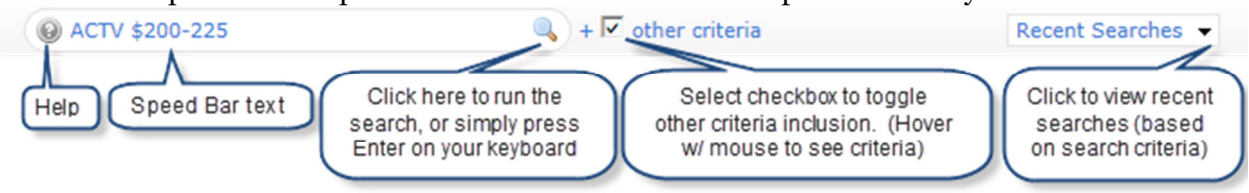


4. Click

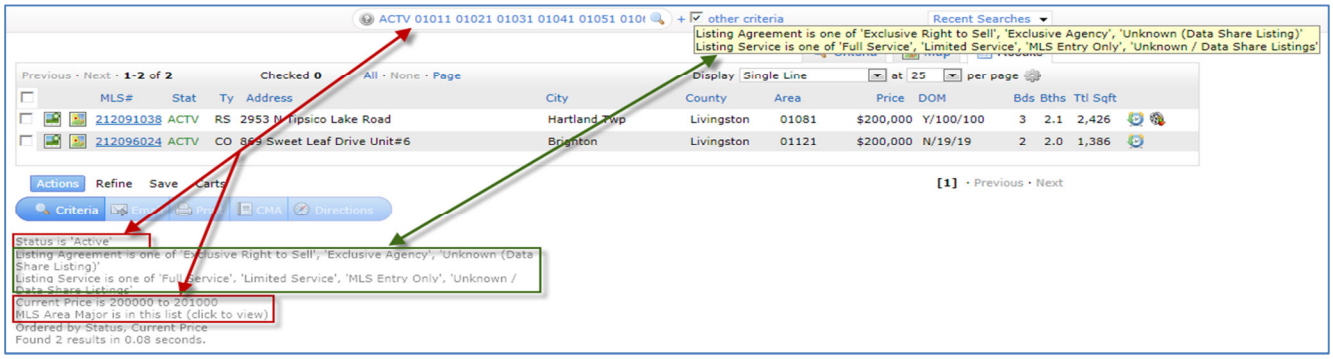
Chapter 4: Speed Bar

Speed Bar

The Speed Bar is available just below the Navigation bar on every Matrix screen. Use the Speed Bar for quick searches using shorthand. Quickly revise your criteria as needed right from the results screen.
Here are the parts of the Speed Bar which is located at the top centre of all your Matrix screens:



Create and save your own Speed Bar shortcuts for additional frequently used fields. The search bar searches Residential listings by default unless you specify a different property type. **Note** that when you run a regular search, the Speed Bar is automatically filled in to correspond to your search criteria. Study the following screen shot. A Vacant Land search was run with three additional criteria. Note that if a search field is not part of Speed Bar, ***Other Criteria*** will be present.



* If you do not define a property type in your Speed Bar search the Speed Bar will default to searching Residential. To search other tables you will need to specify the Property Type.

In the first section we will start by going over all the different syntax that Speed Bar will recognize, followed by a few examples. In the second part we will go over some more advanced syntax and show you how you can combine the syntax to create more advanced searches. Finally we'll show you how to create and use Speed Bar Shortcuts.

Section 1: Basic Speed Bar Syntax

Field Name	Syntax	Example	Result
MLS Number	Any 4-6 digit MLS Number	100000	Returns listing that has a MLS number equal to 100000
		100000 100001	Returns listings that have MLS numbers equal to 100000 or 100001
Address Search*	-Street Name	cottonwood	Returns all listings with street name Cottonwood
	-Street # Street Name	112 cottonwood	Returns all listings with the address 112 Cottonwood
	-Street # Direction and Name	687 s cottonwood	Returns all listings at 687 South Cottonwood
Status*	Any of the following values:		
	-A for Available	A	Returns all active listings
	-C for Avail w/Contingency	C	Returns all avail w/contingency listings
	-S for Sold & Settled	S	Return all sold listings
	-T for Temp off Market	T	Returns all temp listings
	-U for Under Agreement	U	Returns all under agreement listings
	-W for Withdrawn	W	Returns all withdrawn listings
	-X for Expired	X	Returns all expired listings
Status* with Date Range	For all status values above a number added is days back		
	-A30	A30	Returns all active listings for the last 30 days
Sub Type*	R Value of any Sub Types		
	-Residential Lot	LOTR	Returns all listings of Sub Type Residential Lot
	-Condo	Com CONDO	Returns commercial listings of type condo
Sub Type Category	R Value of Sub Type Categories		
	-Modular	MODU	Returns all residential listings of category modular
	-Semi Detached	SMID	Returns all residential listings of category semi detached
Current Price*	Any 2-5 digit number starting with a $ sign. +/- can be used to specify price ranges. Prices are in the thousands.	$100	Returns listings with a list price of $100000
		$100+	Returns listings with a list price equal to or greater than $100000
		$100-	Returns listings with a list price equal to or less than $100000
		$100-200	Returns listing with a list price between $100000 and $200000
Beds*	Any 1 digit number. +/- can be used to specify Beds range. You can also add be or beds to the end of the digit	2	Returns listings with 2 Bed
		2+	Returns listings with 2 or more Beds
		2-	Returns listings with 2 or less Beds
		2-4	Returns listings with between 2 and 4 Beds

	to make it easier to read.	3 beds	Returns listings with 3 Beds
Baths*	Any 1 digit number. +/- can be used to specify Baths range. You can also add ba or baths to the end of the digit to make it easier to read.	2 2+ 2- 2-4 3 baths	Returns listings with 2 Baths Returns listings with 2 or more Baths Returns listings with 2 or less Baths Returns listings with between 2 and 4 Bath Returns listings with 3 Baths
Beds/Baths*	Any 1 digit followed by a space then another digit. +/- can be used to specify ranges.	2 1 2 1+ 2- 3- 2-4 1-3	Returns listings with 2 Beds and 1 Bath Returns listings with 2 Beds and 1 or more Baths Returns listings with 2 or less Beds and 3 or less Baths Returns listings with 2 to 4 Beds and 1 to 3 Baths
Living Area*	Any 2-5 digit number followed by sqft. +/- can be used to specify ranges.	1000 sqft 1000+ sqft 1000- sqft 1000-2000 sqft	Returns listings with 1000 SqFt Returns listings with 1000 or more SqFt Returns listings with 1000 or less SqFt Returns listings with between 1000 and 2000 SqFt
Search Type	Specify the search type -res for Residential -com for Commercial -invest for Investment -far for Farm -xprop for Cross Property	 res A com A invest S far W xprop A	 Returns available residential listings Returns available commercial listings Returns sold investment listings Returns withdrawn farm listings Returns available cross property listings
Agents	These combinations are valid: -Last Name -First Name Last Name	agent Smith agent smit* Agent Robert Smith	Returns agents with the last name Smith Returns agents with the last name like smith Returns agents with the name Robert Smith

Openhouse	Any of these combinations is valid for Openhouse Dates. +/- can be used to specify ranges. -m/d/yy or m/d/yyyy -mm/dd/yy or mm/dd/yyyy -Relative dates	OH 01/01/2009 OH 01/01/2009+ OH 01/01/2009- OH 1/1/2009-1/1/2010 OH 0 OH 0 OH 0- OH 0-2	Returns Openhouses on 1/1/2009 Returns Openhouses on 1/1/2009 or later Returns Openhouses on 1/1/2009 or earlier Returns Openhouses between 1/1/2009 and 1/1/2010 Returns Openhouses on the current date Returns Openhouses on the current date or later Returns Openhouses on the current date or earlier Returns Openhouses for the last 2 days

Section 2: Advanced Speed Bar Syntax Examples In this section we will go over some examples of more advanced Speed Bar syntax to demonstrate how a few simple speed bar commands can be combined to do complex searches.

Example 1: Listings

1) Show me all the Available Residential listings with a current price between $400,000-$600,000
   A $400-600
2) Show me all the Available Residential listings with a current price between $400,000-$600,000 for the last 30 days
   A30 $400-600
3) Show me all the Available Modular listings with a current price between $40,000-$200,000
   A MODU $40-200
4) Show me all the Available Row/Townhouse listings with a current price between $40,000-$100,000 with 2-3 bedrooms
   A RWTH $40-100 2-3
5) Show me all the Available Apartment Style listings with a list price between $40,000-$200,000 with 2-3 bedrooms and 3+ baths
   A APTS $40-200 2-3 3+
6) Show me all the Available Detached listings with a list price between $400,000-$600,000 with 2-3 bedrooms and 3+ baths in the County of Berks
   A RESI Berks $40-200 2-3 3+
7) Show me all the Available Semi Detached listings with a list price between $400,000-$600,000 with 2-3 bedrooms and 3+ baths in the County of Berks with over 2000 sqft
   A SMID Berks $40-200 2-3 3+ 2000+ sqft

Example 2: Agents

5 * If you do not define a property type in your Speed Bar search the Speed Bar will default to searching Residential. To search other tables you will need to specify the Property Type.

1) Show me all the Agents with the Last Name Smith
   Ag Smith
2) Show me all the Agents with the Name John Smith
   Ag John Smith
3) Show me all the Agents with the a First Name starting with A and a Last Name Smith
   Ag A* Smith

Example 4: Address

1) Show me all the Residential listings with the address 26 Cottonwood
   26 cottonwood
2) Show me all listings on 10 Street Ea
   10 E
3) Show me all the Sold Residential listings with the address 26 Cottonwood
   S 26 Cottonwood

Example 5: Openhouse

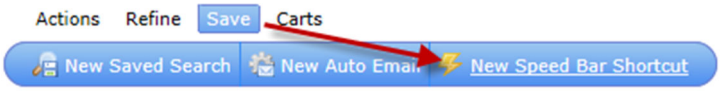
1) Show me all the Openhouses for today
   Oh 0
2) Show me all the Openhouses for the last 2 days
   Oh 0-2
3) Show me all the Openhouses for the period of 12/01/2009-12/31/2009
   Oh 12/01/2009-12/31/2009
4) Show me all the Openhouses for 09/01/2010
   Oh 09/01/2010

As you can see from above by combining some of the syntax we can turn a very broad search into an extremely specialized search in a manner of seconds with Speed Bar.

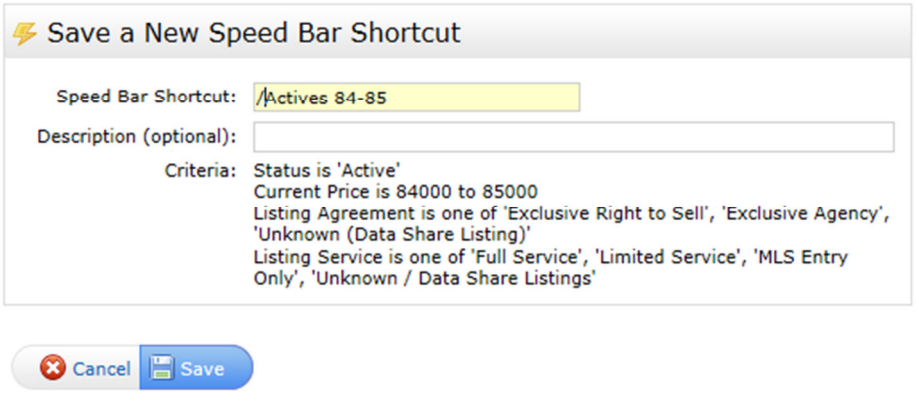
6 * If you do not define a property type in your Speed Bar search the Speed Bar will default to searching Residential. To search other tables you will need to specify the Property Type.

Section 3: Speed Bar Shortcuts if you have some frequently used searches; you can create and save Speed Bar Shortcuts, and use these either alone or in combination with other Speed Bar entries.

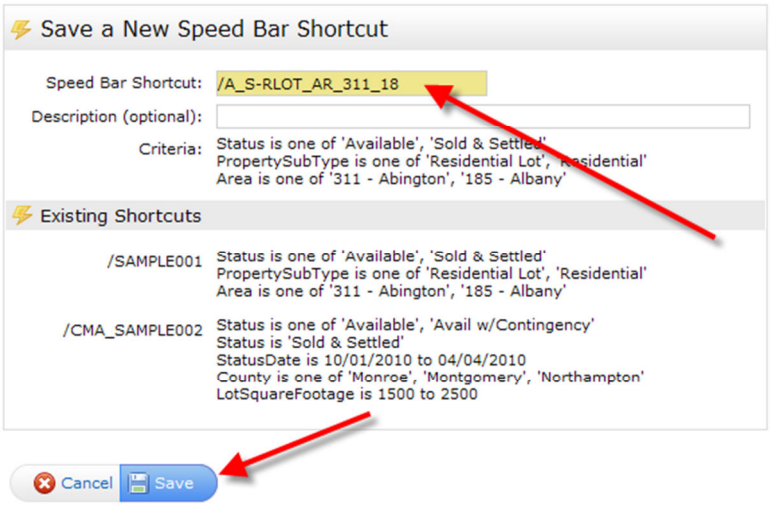
From any search, click Save Button Bar and choose New Speed Bar Shortcut.



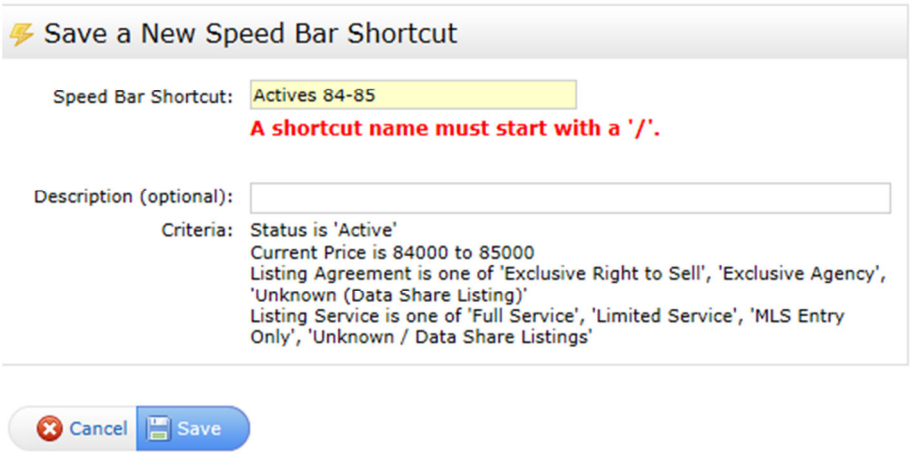
This will take you to:



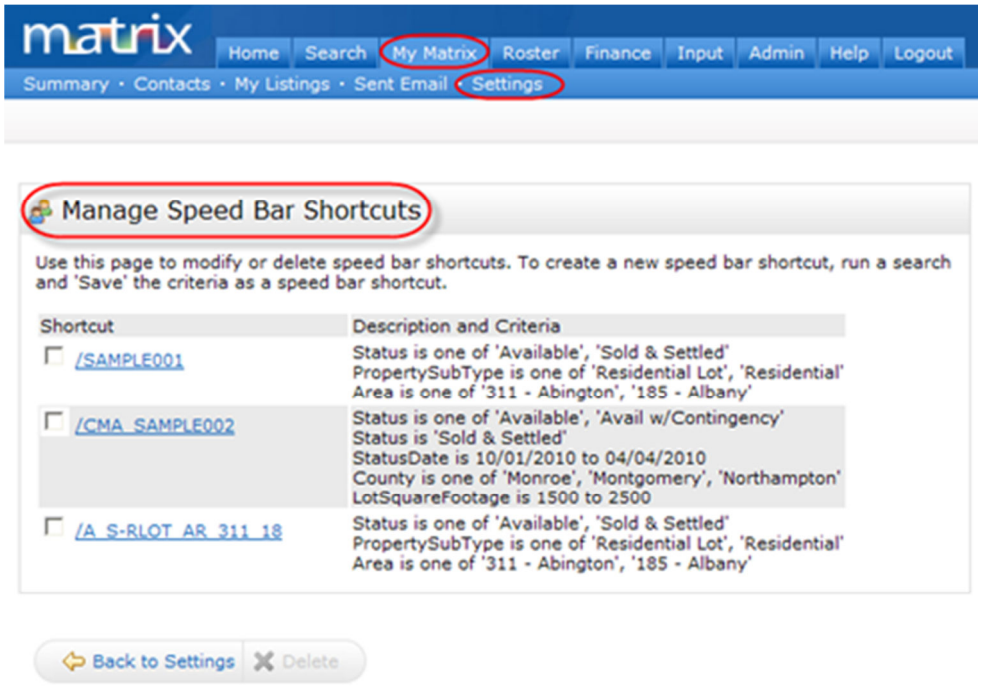
A Shortcut has the "/" slash as its first character. Enter a meaningful but short name, click Save and you're done. Note that your existing Speed Bar Shortcuts are listed below to help you choose a unique shortcut name.



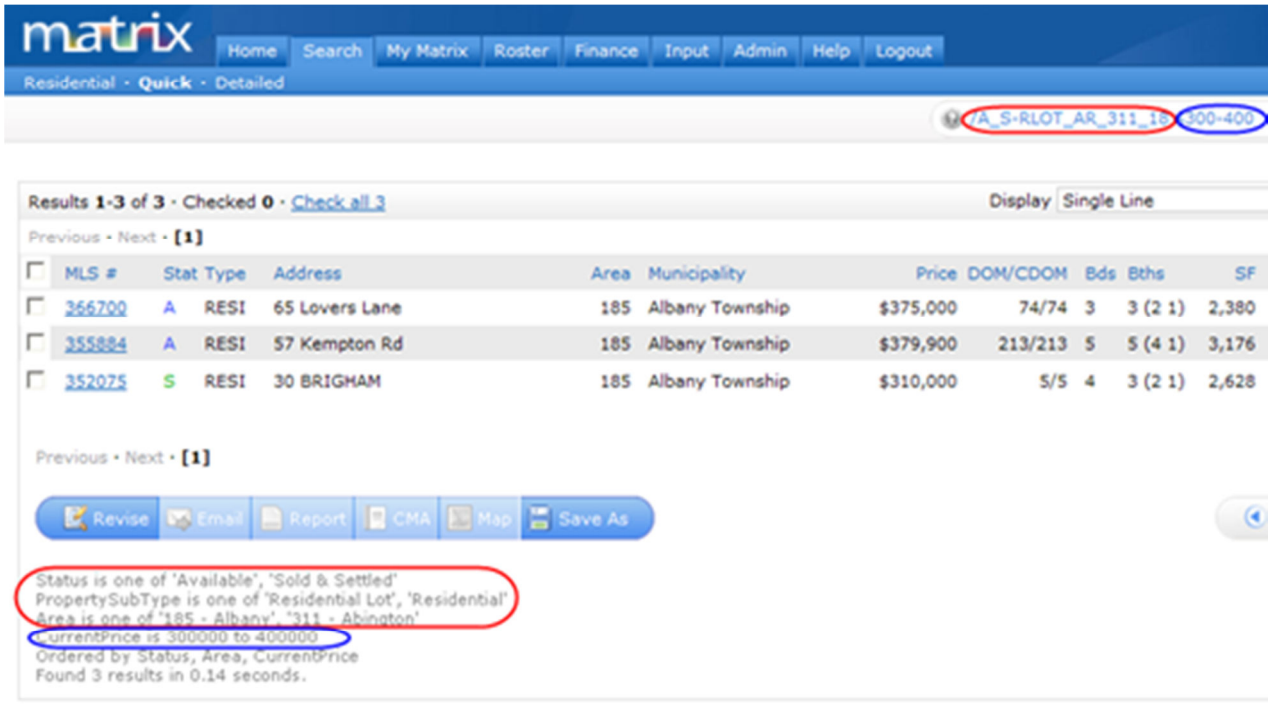
You will be given easy to understand messages to guide you in naming your Speed Bar Shortcuts:



You can find all your Shortcuts under My Matrix > Settings >

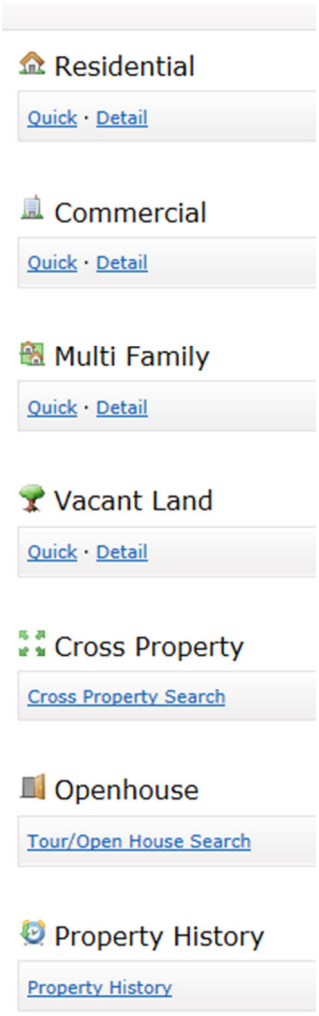


You can now use any Shortcut by typing it into the Speed Bar, along with any additional criteria:



Chapter 5: Performing Searches

To search for properties in Matrix, click on the Search tab at the top of the screen.



Residential, Commercial, etc. are samples of different property types you can search for in Matrix. *Cross Property* will give you a combined "view" of all the property types listed on the system.

In addition, other searches may be conducted on Open Houses and Property History.

Selecting a Property Type

Based on the Property Type you have selected, you can choose your search options:

Quick- This search contains the standard fields most commonly used in a search. The ability to add other custom fields is available in this search.

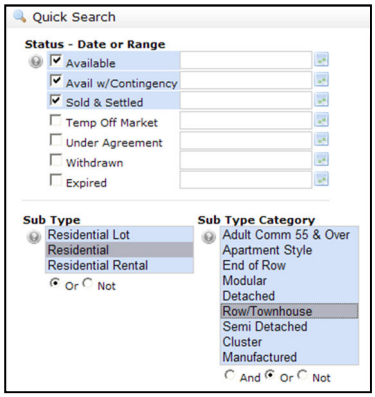
If you would like to search for a different property type, simply click on the Search tab. This will display the property types again, allowing you to make a different selection.

Cross Property Search

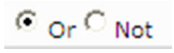
If you do not know which property type you should search for, click on the "**Cross Property**" link. This allows you to search across all three property types at the same time. Use this option if you cannot find a specific listing or if you are not sure how the agent listed the property.

Search for Listings

To perform a search, select the criteria from the fields that are on the default search screen that you wish to search by. The search screen will display the default search criteria fields. (Note: Additional search fields can be added to customize search by clicking on the **Add/Remove** link located at the bottom of the search screen.



To Select or De-Select Items:
Single Item – To select a single item, click on that item once.
Multiple items – To select more than one item, hold down the **CTRL** Key on the keyboard and click on the items desired.
De-selecting – To De-select an item, hold down the **CTRL** Key while clicking the item to De-select.

Or/Not Options 

Or Locates listings that match ANY of the Items selected
Not Locates listings that **DO NOT** have the item(s) selected

Text Box Data Entry (ETC)
The text input box accepts both letters and numbers. Remarks Field, MLS #, Street Name, Zip Code etc. are Examples of Text Box Data Entry fields.

Use the asterisk (*) as a wildcard, for any portion of the name of which you are unsure. Example: Lake* will search for all listings beginning with Lake, Lakeland, Lakeshore, Lakeview etc. Using the (*) before a word *Lake will search for listings that end with Lake, South Lake, Cedar Lake, Loon Lake, ETC.
This will include street type too i.e. Avenue, Lane. Road, Street, etc.
Use a comma (,) to separate multiple items in a list. **Note:** Do not use (,) comma's for the number fields.
Number Fields

Price Fields

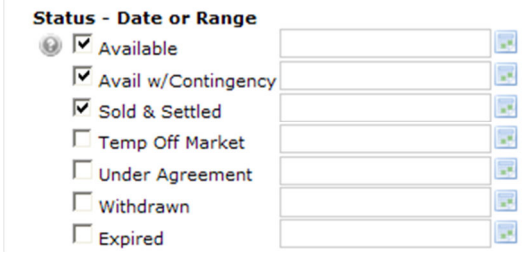
Values may be searched by thousands or by exact dollar value, depending on whether the (000) checkbox is checked.

The different Number formats are:

800 to find exactly $800,000
800- to find less than or equal to $800,000
800+ to find greater than or equal to $800,000
800-900 to find a range from $800,000 to $900,000

If you are looking for a Lease:
You most likely want to uncheck the thousands checkbox.
14 to find exactly $14
14+ to find greater than or equal to $14

Date Fields

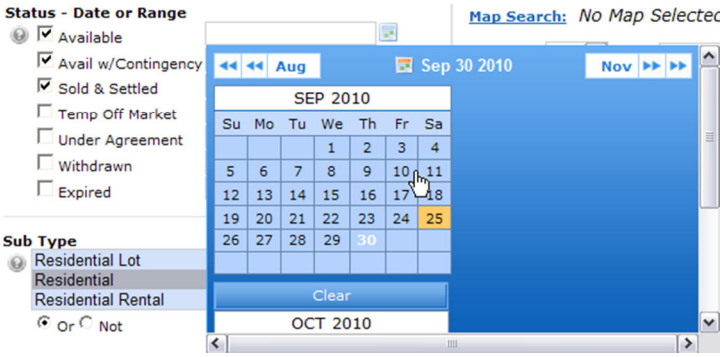


For Original (Commencement/List Date), Sale (Day the listing Sold), Last Status/Price Change, Dates the different formats are:
4/20/2010 to find April 20, 2010
4/20/2010-4/27/2010 to find a date range from April 20th to April 27th 2010
4/20/2010+ to find dates equal to or greater than April 20th 2010
4+ to find 4 days back from the current date.
4-6 to find dates between 4 to 6 days back from the current date.

Date fields correspond to their respective statuses (ie: Available refers to Listing Date, Sold & Settled refers to Selling Date, Expired to Expiration Date, etc.)
You can also choose to use the calendar, See "Using the Calendar" below

Using the Calendar

To specify a date range **via the calendar**, click on the Calendar icon next to each date field (right-side) to display a two month calendar.
Click on the desired start and end dates (Example Select Jan 1st 2010 – Today's date) - the chosen range will be highlighted in green. To move back and forth between months and years click on the arrows located to the top right and left hand corners of the calendar. The inside left hand arrow will bring you back One Year, and the inside Right hand arrow will bring you forward One Year.
The outside Left hand arrow will bring you back One month, and the outside right hand arrow will bring you forward One Month. Once you have selected a date (hold your curser over the date selected) you will notice that two orange arrows will appear one pointing left and the other pointing right.
If you click on the orange arrow to the left this will select all dates **BEFORE** the date selected (Example, if you select Jan 1st 2010 and click on the orange left hand arrow this will give you anything on or **BEFORE** Jan 1st 2010) If you click on the orange arrow to the right hand of the date you selected this will give you anything on or **AFTER** the date selected (Example, if you select Jan 1st 2010 and click on the orange right hand arrow this will give you anything on or AFTER Jan 1st 2010).
When you've made your selections, click the OK button beneath the calendars. To clear your date entry and begin again, click the Clear button beneath the calendars.

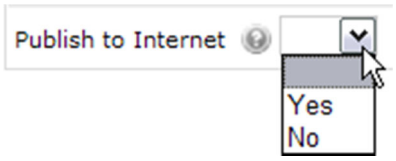


Negative Search

To exclude a specific item from your search, put an exclamation mark (!) before it. For example, if you want to exclude Zip Code 18360 from your search, type '!18360 in the Zip Code field. Separate multiple items with commas. For multiple items, be sure to put the exclamation mark before each field.

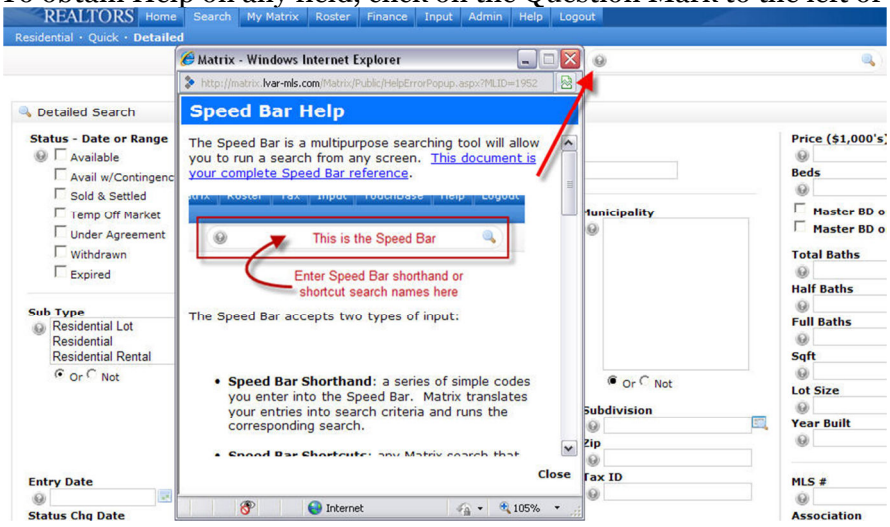
Pick List (Y/N Option)

The "Publish to Internet -Y/N" field drop down list is an example of a pick list field. When you click on a pick list field, a drop down menu will appear with different options. You will have three choices. Yes, No and Blank. Blank means both Yes and No. Note: In a pick list you can only select one item at a time.



Need Help?

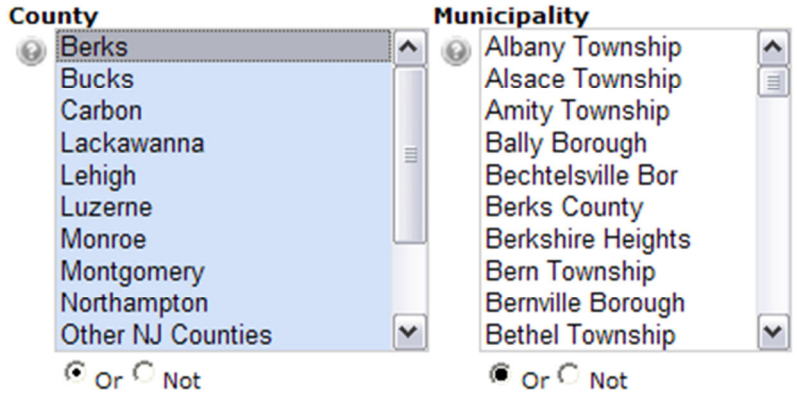
To obtain Help on any field, click on the Question Mark to the left of the field.



Text Box fields offer a hover help option, in addition to the help. All you have to do is hold the cursor over the blank field and helpful information will appear.

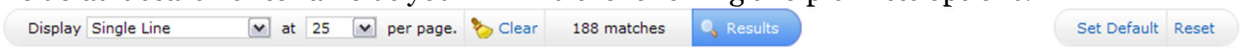
Area Search

For the Area search (aside from Area) you can also select other fields such as County as well (together with Area or separately). By selecting a County, you will be able to select any sub-fields (ie: Municipalities) associated with the County. To select all of one area, click on the County you wish to select (i.e. if you were to click Berks, all listings from Berks County would be available to select no matter what Municipality they fall into also).



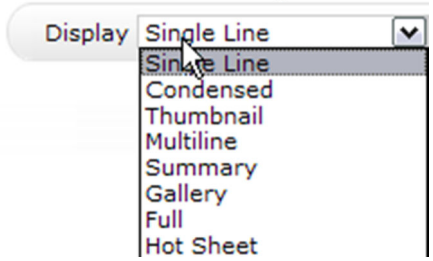
Display/Other Options

Before you run a search, Matrix lets you customize your results' display. Located directly below the default search criteria fields you will find the following two pick lists options:



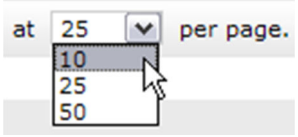
Display

Before you select the Results Button, use the drop down menu and select the desired Display you wish to view the listings in.



Display Number of Listings Per Page

Using the drop down menu; select the desired display listings displayed per page. Depending on the desired Display you choose, you can have 10, 25, 50, or 250 listings per page. Once you select a number and execute a search, Matrix will retain that number until you change it from this pick list.

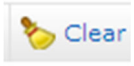


Default Search Criteria
You can set up default search criteria. For example, if you do the majority of your business in the "Fountain Hill" area, you can save that as your default. After you have done this, "Fountain Hill" will automatically be selected every time you enter the search screen.

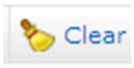
To set your default criteria:
1. Select the search criteria that you would like to establish as your default.

2. Click on the Set Default button

located in the bottom right of the search screen

The criteria you have entered will now be saved as your default. You can clear your default criteria by clicking the 

Clear button to the left of the Results button and reselect Set Default to begin with a clean slate.



- When you click on this button all of your search criteria, including your default search criteria, will be cleared from the current screen. Note: If you are having search results that seem to not match your intended search criteria, then repeat using the clear and Set Default buttons.

Restore Default
You can restore your default after using the Clear button.

Map Search

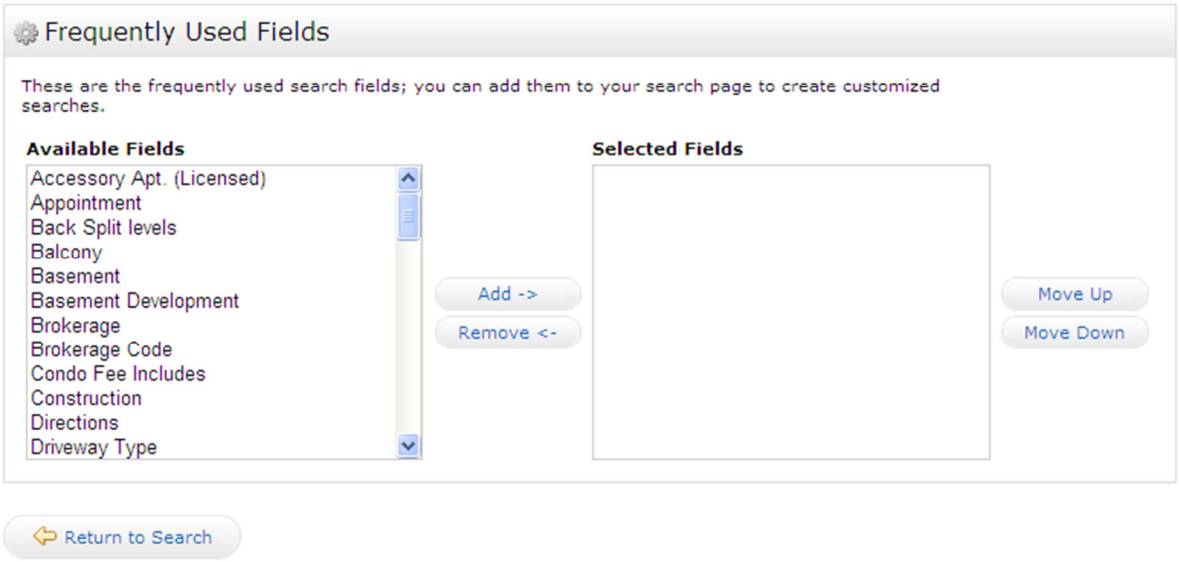
Search results conducted on the Criteria screen are rendered on a Map by clicking on the Map tab. This feature is largely intuitive to use and is described in a separate document.

Chapter 6: Customizing Your Search Screen

Adding Search Fields

If you need to be more specific in your search, or cannot find the field you wish to search by on the default search screen, you can add additional fields by:

1. Click on the Additional Fields Add link located to the bottom of the default search screen.



2. In the Available Fields box, select the field(s) that you want to add to your search.
3. Double click the field name or Click on Add button.

This will move the highlighted field to the Selected Fields box. Repeat this process until you have all the search fields that you want.

Note: To select more than one field at time, hold down the CTRL Key while selecting the fields.

4.When completed, select the Return to Search button

To remove additional search fields:

1. Click on the Additional Fields Add/Remove link at the bottom of the screen.
2. In the Available Fields box, select the field that you want to remove. You can select as many fields as you like.
3. Click on "Remove" button

This will remove the highlighted field from the Selected Fields box.

4. Select the Return to Search button

To change the order of the selected fields:

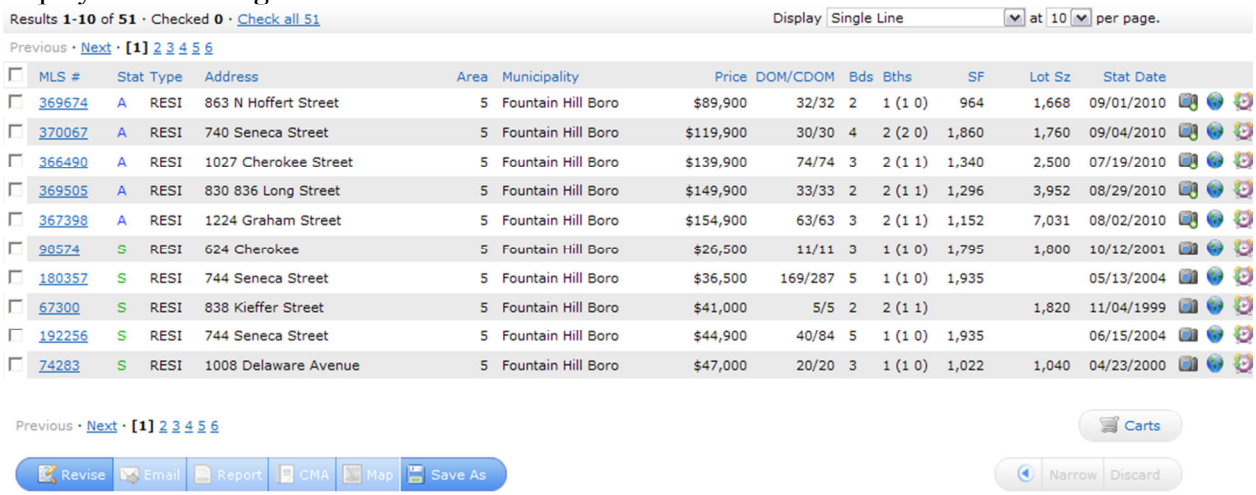
1. Click on the field in the Selected Fields box that you want to move.
2. Click Move Up or Move Down to move the selected field in the desired order.
3. Select the Return to Search button

The search criteria screen will reappear. Scroll down to the bottom of the search screen area to view the search fields that you have added. Complete the fields. Note: Be aware for future searches that these fields will remain on your default search screen until you remove them.

Chapter 7: Navigating the Search Results

Navigating the Single Line Search Results

At the top of the search results display page, just below the blue navigation bar, Matrix will display the following information.



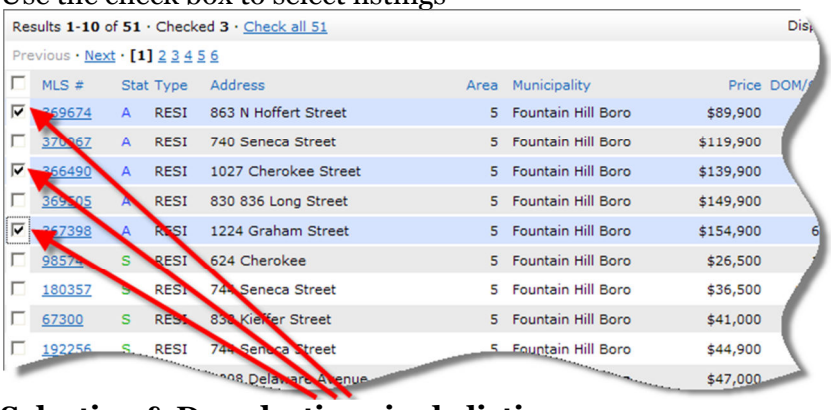
Results

1 – 10 Represents the number of listings per page
(Note: Remember from above you can select 10, 25, 50.)
51 – Represents the number of listings total for that match the criteria previously entered

If there is more than one page of listings, use these links to navigate:
Previous Takes you to the previous page of listings
Next Takes you to the next page of listings
Numbers Advances to a specific page

Selecting a Listing

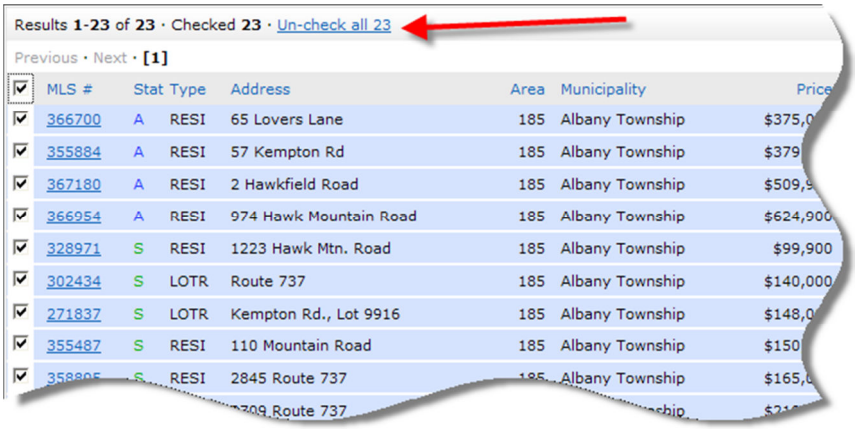
Use the check box to select listings



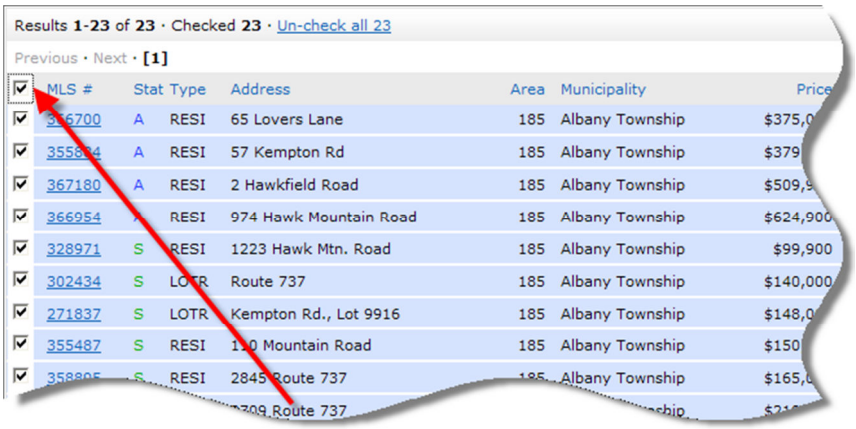
Selecting & De-selecting single listings

To select a listing that would allow you to do many actions, click in the check box to the left of the listing. A check mark will appear in the check box and the listing display will turn blue to indicate that you have selected that listing. To de-select the listing, click in the box again and the check mark will disappear, indicating that the listing is no longer selected.

Selecting & De-selecting all the listings



To select all the listings on the current page, click in the first check box at the top of the page or select the Check all # Link. This will put a check mark in all the boxes on the current page, indicating that they are all selected plus turn the items to blue.



If you click in the check box at the top of the page again, the check mark will disappear or the Un-check all # all the listings, indicating that none of them are selected.

How to Use the Icons

The Map

Click on the globe icon to generate a popup window which initially displays a Road map view of the listing. You have the ability to zoom in, zoom out, or change the viewing location using your mouse. You can select other viewing modes afterward.

Photos

The camera icon can be displayed in three ways.

1. If there is no camera icon, there is no photo.
2. If there is a camera icon with a green plus sign over the icon, there are multiple photos.
3. If there is a camera icon with no green plus sign over the icon, there is exactly one photo.

To view the photo of a listing:

Click on camera icon. You will see one or more photos. Click any photo to view a large version. Click on in the top right-hand corner of the photo window to close the window.

Property History

Click on the Clock icon located to the right of the Sale Date field to view the property history on that MLS #. Note: To get a full property history on a certain address you must do a "Street Search", the clock will only give you information on the particular MLS #.

Virtual Tour

Click on the Film Strip icon to view the virtual tour for that listing.

Brochure

Click on the brochure icon to view the brochure for that listing.

Supplements

Click on the Supplements icon to view any attached documents for that listing. Example: Schedule B's, Floor Plans, ETC.

Additional Icons

Your implementation of Matrix will likely have additional icons not mentioned above. You can roll your cursor over the icon to get the text description of what that icon represents. If in doubt, click it to see what happens!

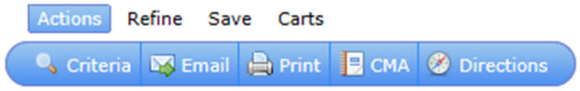
Search Criteria

Your current search criteria are shown at the bottom of the Results screen, together with the approximate time taken by the system to execute the search.

Status is 'Active'
Listing Agreement is one of 'Exclusive Right to Sell', 'Exclusive Agency', 'Unknown (Data Share Listing)'
Listing Service is one of 'Full Service', 'Limited Service', 'MLS Entry Only', 'Unknown / Data Share Listings'
Current Price is 200000 to 210000
Transaction Type is 'Sale'
Found 14 results in 0.13 seconds.

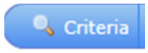
Chapter 8: Search Actions Button Bar

At the bottom of your Search Screen you will see two rows of "buttons":

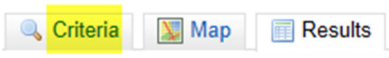


The top row is the major category, and clicking on each will change the bottom row to correspond to those functions. Chapters 8 through 11 will describe each of these major categories in turn.

Criteria



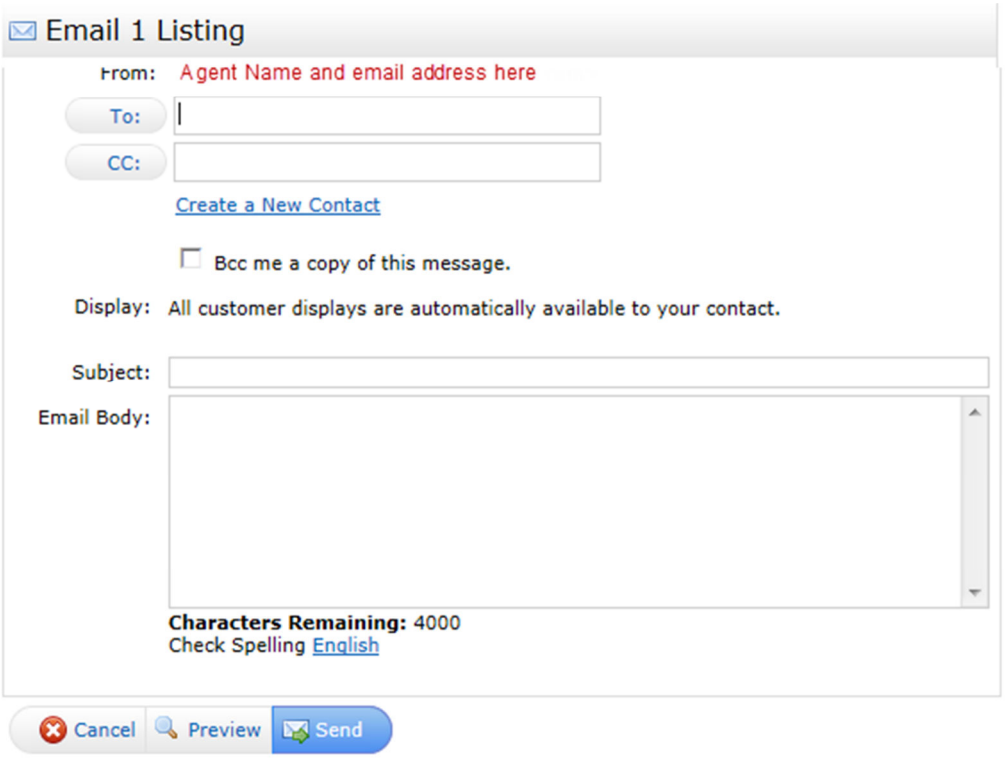
matches the Criteria tab



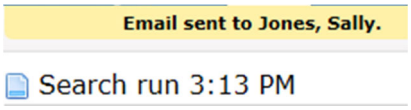
at the top of your search screen. These both do the same function – clicking either one will return you to the Search Criteria screen so you can enter or modify your search.
Now, select any or all listings from the search to apply the selected Action:

Email

will bring you to the following screen where the selected listing will be emailed to an existing Contact or to an email address you type in directly.



Once the listing has been emailed, you will see a notification on the top left corner of your screen:

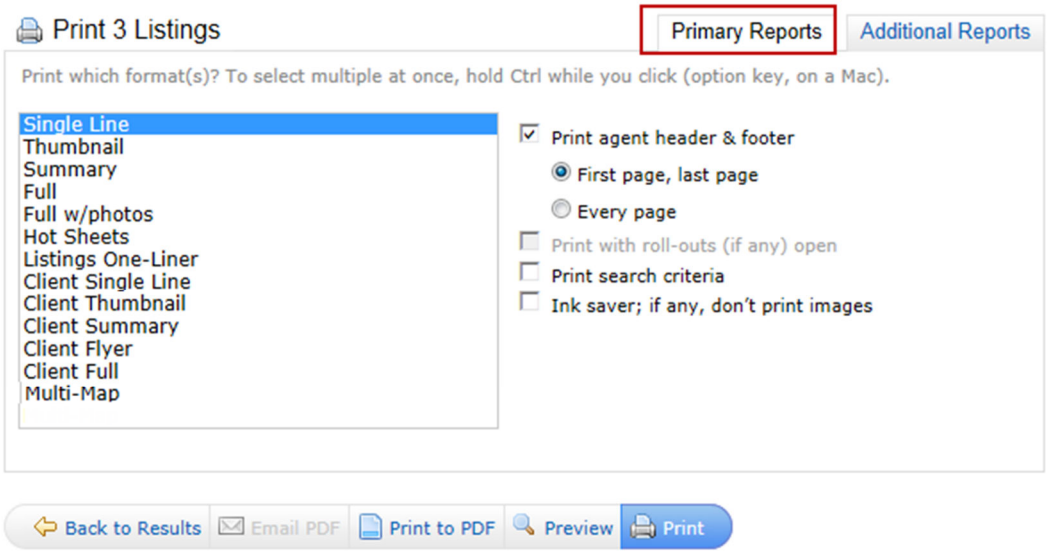


See Chapter 12: Direct Emailing for further information.

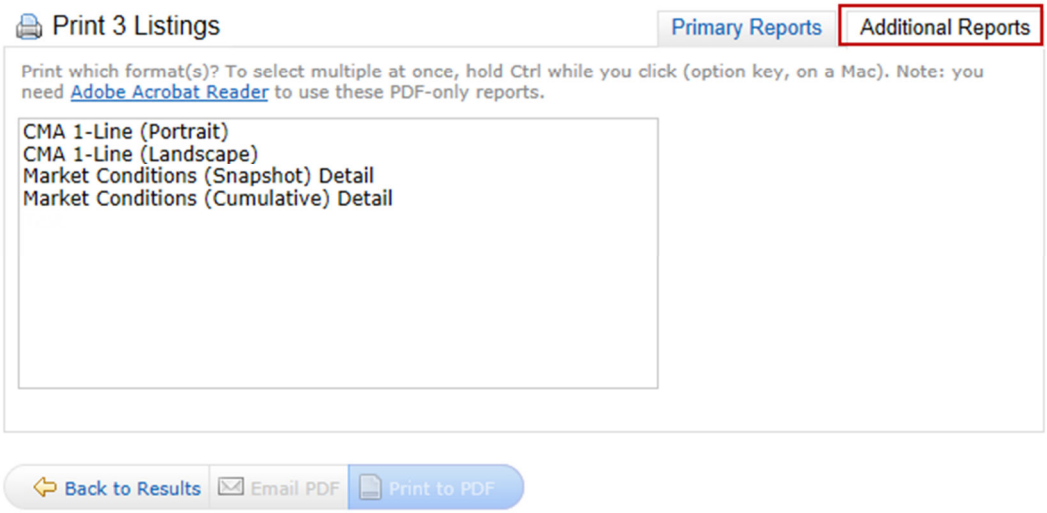
Print

Clicking the

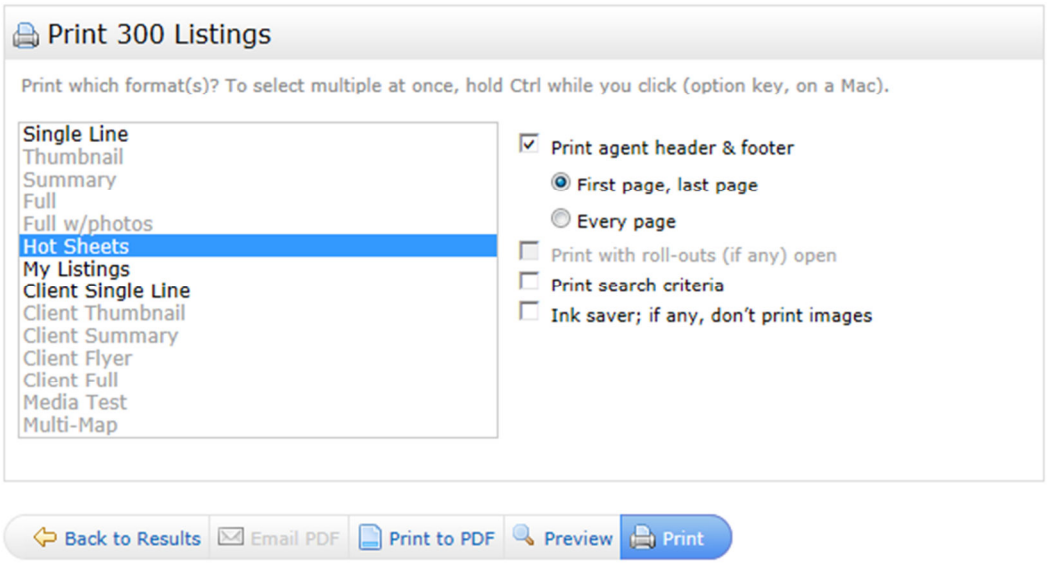
button gives you the selection of print formats.



The above reports are equivalent to your displays. The Additional Reports are specially formatted and not available as displays:



Note that if a particular format is not selectable (will be lighter text) then the number of listings has exceeded the maximum number set for it. In the following example only single line formats are available because 300 listings have been selected.



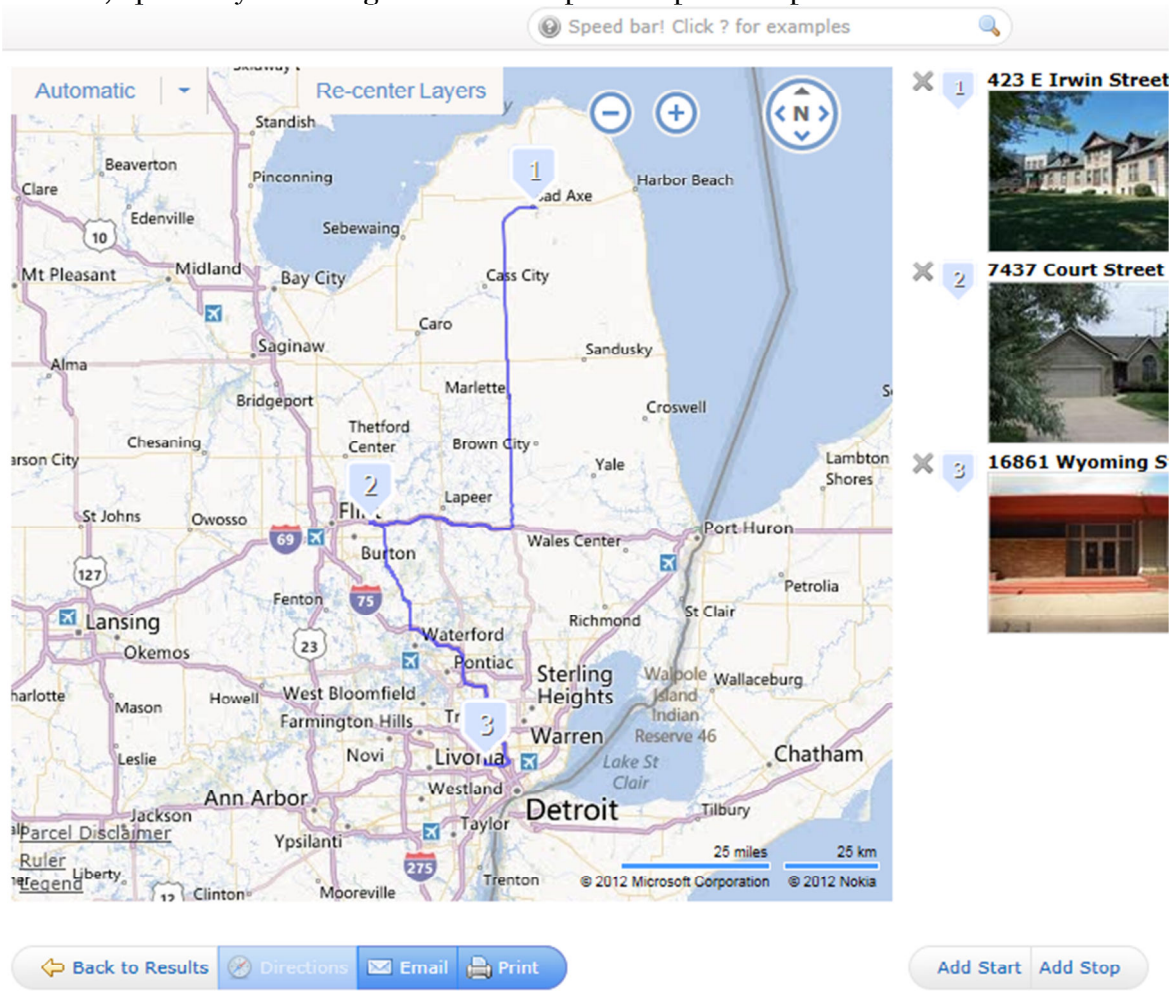
CMA – Comparative Market Analysis

See Chapter 14: CMA (Comparative Market Analysis) REPORTS for complete details.

Directions

With more than one listing selected, click on

to have driving directions generated. You can add Start and Stop points to the trip and then either Email or Print several alternate formats, optionally including overview and point to point maps.



Turn-by-Turn Directions

Total distance: 148.0 Miles

1 **423 E Irwin Street**

MLS#: **211093906**
Status: **ACTV**
Price: **$300,000**
SqFt: **20,794**
Front Ft: **262**
Trans Ty: **Sale**

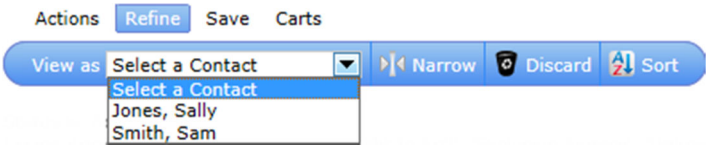
Start	Depart **E Irwin St** toward **Whitelam St**
1	Turn **right** onto **Whitelam St** (0.2 Miles)
2	Turn **right** onto **M-142 / Sand Beach Rd** (0.3 Miles)

See Chapter 15 Map Feature/Driving Directions for details.

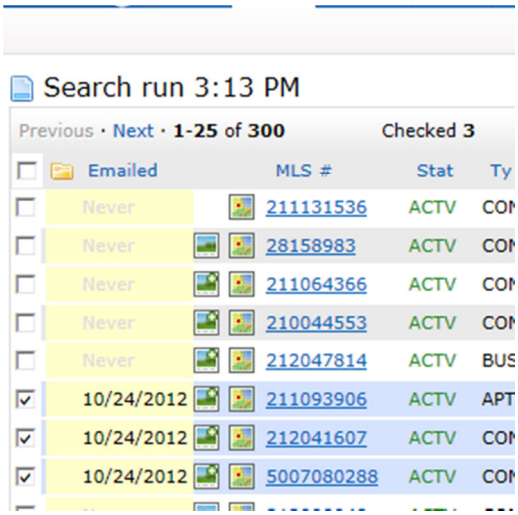
Chapter 9: Refine Button Bar

The next major category is the Refine section.

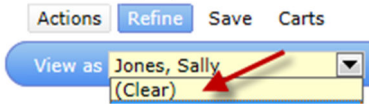
View As – "Goggles" views.



For the selected Contact, the Search Results listings are shown with the Favorite / Possibility / Discard bucket icon and the latest date the listing was emailed to that Contact.



In this case Sally has not set any of the listing as Favorites or Possibilities. To revert back to a normal display, click View As (Clear).



Narrow

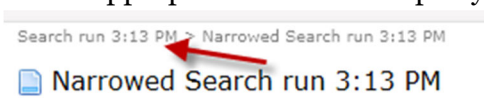
This button is for selecting the listings you want to keep and deleting the other listings.

Using the Narrow Button
To narrow the search,

1. Select the listings you want to keep by checking them off.

2. Click on Narrow Button. All but your selected listings will be removed from your results.
Note: To go back to the original results, click the appropriate link at the top of your screen:

or



Discard

Discard Button: for deleting your selected listings.
Note: If the objective is to save a search, it is advised that you save before using the Narrow or Discard buttons. Once you use these buttons, the search parameters are changed to reflect only those listings you keep in your results. For more information on how to save a search, see

Using the Discard Button
The Discard button allows you to delete the selected listings from the displayed results. After clicking on the Discard Button, Matrix will add an "Un-Discard" button

so that you have the option to retrieve the listings you previously discarded. **Note:** There is a limit of 50 discarded listings that you can "Un-Discard" per search. If you find that you are always using this function, there is a possibility it would be better to refine your search so you would not have to discard as many listings.

Discard Listings
1. Select the listings you want to discard.
2. Click on Discard button.
The selected listings will be "discarded" from your search results. At the bottom of the search results screen you will be able to see how many listings you are excluding.
Note: If you discard listings and then save a search, those listings will also be excluded from any updates you run.

Retrieve Discarded

To add discarded listings back to your search results click on Un-discard

to the right of the Discard button.
Note: Any listings that have changed and no longer meet your search criteria will not be added back to your results.

Sorting

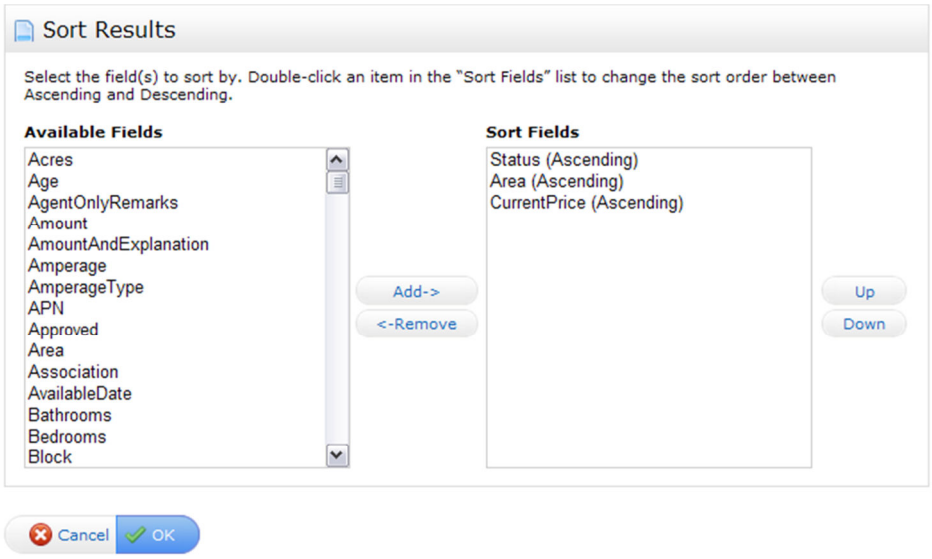
Click the

button to change the order of your search results. Alternately, you may click on the headings on the single line display to change the sequence of your results.

Sort Button

To create a custom sort, click the

.
This will open the Sort Order window containing field boxes. The Available Fields box contains all of the fields that are available to sort by and the Sort Fields box contains all the fields that include the default setting.



Adding Fields to the Sort Fields box
To add fields to the Sort Fields: box, follow these steps:
1. Click on the field(s) you desire in the Available Fields: box. Note: You cannot use fields already used on the Search Results screen.
2. Click on Add Button. **Note:** Double clicking on the field name will also add the field. That field will be added to the Sort Fields: box

Removing Fields from the Sort Fields Box
To remove fields from the Sort Fields: box, follow these steps:
1. Click on the field you want to remove in the Sort Fields: box.
2. Click on Remove button.

Ascending/Descending
When you first add a field to the Sort Field box you will see Ascending to the right of it. This indicates that the field will be sorted in ascending order. To sort the field in descending order, double-click on the name of the field. You will now see Descending to the right of the field name, indicating that it will be sorted in descending order.

Changing the Sort Order
The fields will be sorted in the order in which they appear in the Sort Fields: box. To change the order:
1. Click on the field name you want to move.
2. Click the Up button to move the field up.
3. Click the Down to move the field down.

Completing the Sort
Click on the Save button to close the sort window and view your re-sorted search results. If you do not want to change the sort order, simply click on the Cancel button and the window will close without changing the sort order. **Note:** You can save your re-sorted search results by using the Save button.

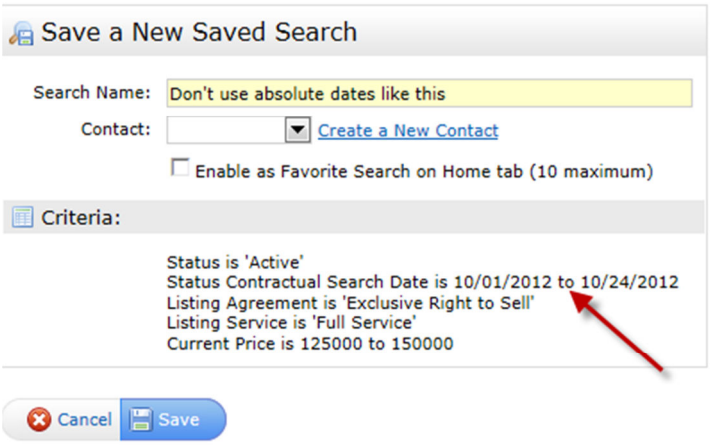
Chapter 10: Save Button Bar

This chapter gives you an overview of Saved Searches, Auto Emails and Speed Bar Shortcuts.

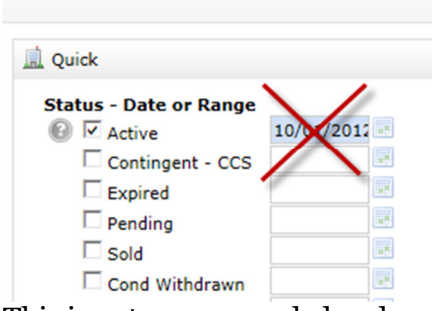
Saved Search

A Saved Search is a collection of search criteria that you find useful and may use often. Saving the criteria as a Saved Search is a shortcut alternative to entering all the criteria in each time that search is to be conducted.

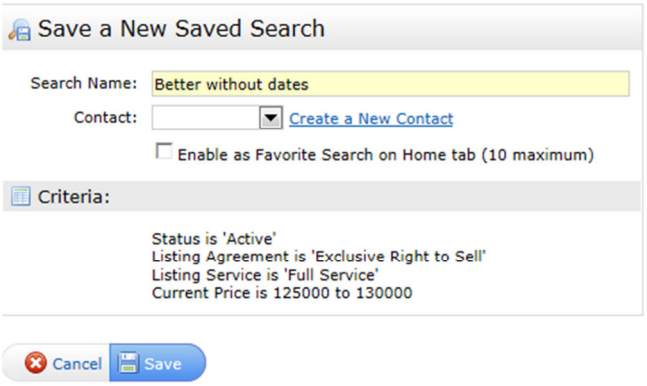
After setting your criteria, Click the New Saved Search button to enter a Name for the SS:

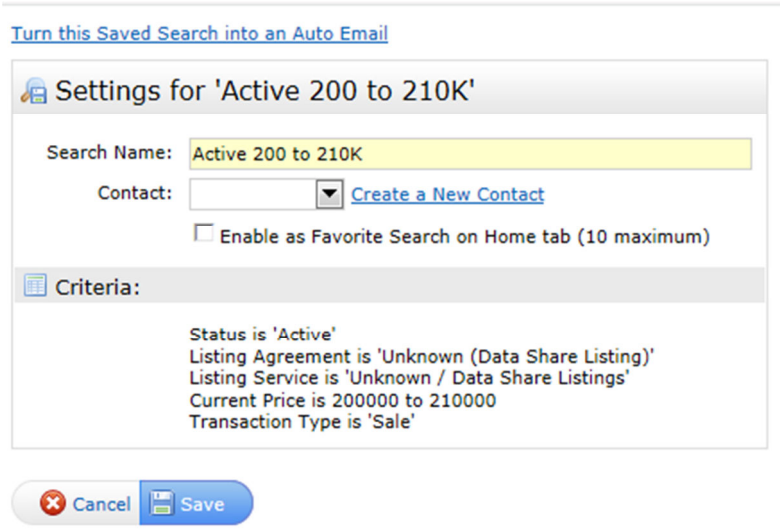


Note that the actual Status Contractual Search Dates are entered.



This is not recommended and a preferred method is to exclude dates from Saved Searches.



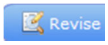


The above screen will be presented from My Matrix / Saved Searches when “Settings” is clicked. Click on Criteria to Revise

Revise a Search

The Revise feature allows you to modify the search. In many cases you may want to

change some of the initial search criteria to refine the search.

To revise the search, click on the Revise Button 

which is located just below the search results to the far left. This will take you to the Search screen with all the current criteria already entered, simply make the changes needed and select Search again.
Note: If you are familiar with the Internet, you might be tempted to use the browser's Back button to return to the search screen and make changes. In some cases this may cause problems depending upon your version of the Browser. It is always better to use the Revise button.

Saved Search
The Save button allows you to save your current search.
To save a search in Matrix,

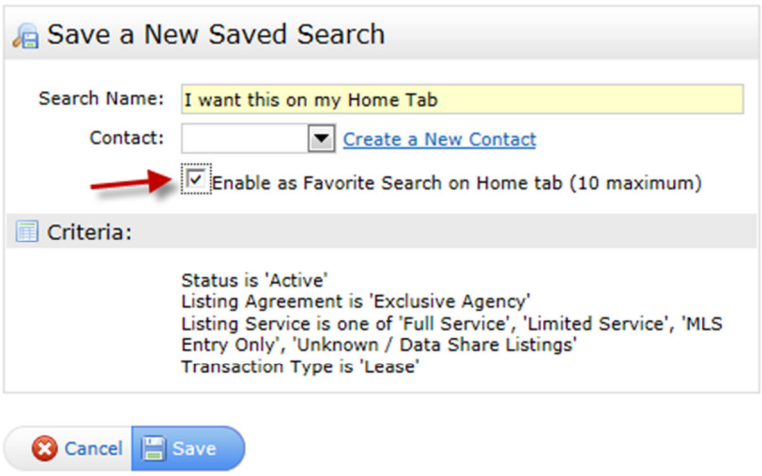
Click on the "Save As" button located to the bottom of the search screen. Three Save features will come up. Click on "New Saved Search".

This will bring up the "Save a New Saved Search" screen. Fill out the Search name field. You can also choose to add a contact to the saved search.

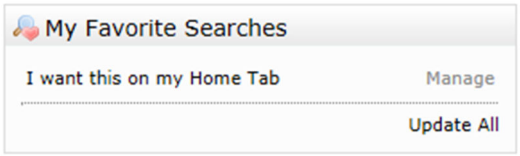
Note: Adding a contact to your saved search does NOT automatically email your saved search to that contact. See

Chapter 13: Accessing Saved Searches/Auto Email for details.

Enable as Hot Search on Home Tab. Note: When you log into Matrix, the Hot Search will appear on the Home Page. Click "Save"



Will give you this entry on your Home Page:



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Sort Button.....32
Adding Fields to the Sort Fields Box.....32
Removing Fields from the Sort Fields Box.....32
Ascending/Descending 33
Changing the Sort Order 33
Completing the Sort 33

Matrix gives you two different ways to work with your search results when you are selecting or de-selecting properties. When you are viewing the Search Results Screen you will see a Narrow and Discard Button at the bottom of the screen.

In Matrix, if you have 500 or fewer search results, Matrix will automatically sort by Status, Area, and List Price (all in ascending order). You can also custom Sort your search results. Along with multi-level sorts, you also have the ability to sort the columns in ascending or descending order.

New Auto Email

For Auto Emails, please see

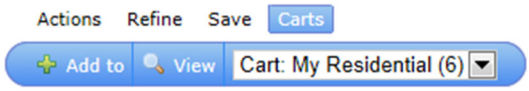
Chapter 13: Accessing Saved Searches/Auto Email for a complete description.

New Speed Bar Shortcut

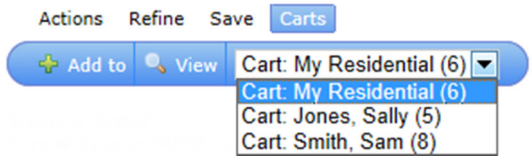
For a complete discussion about Speed Bar, including shortcuts, please see Chapter 4: Speed Bar

Chapter 11: Carts Button Bar

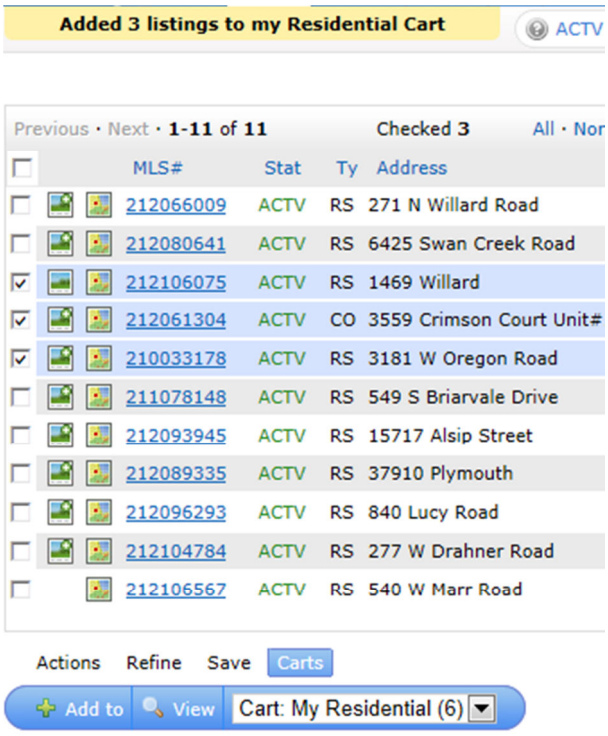
Carts are a great way to save special Listings of interest, or Roster records of Agents or Offices that you want to access frequently.



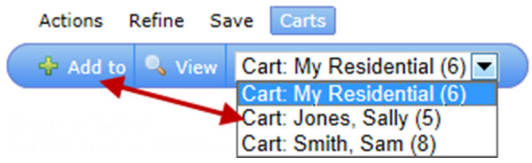
Listing carts are of two varieties – Property Type and Contact.



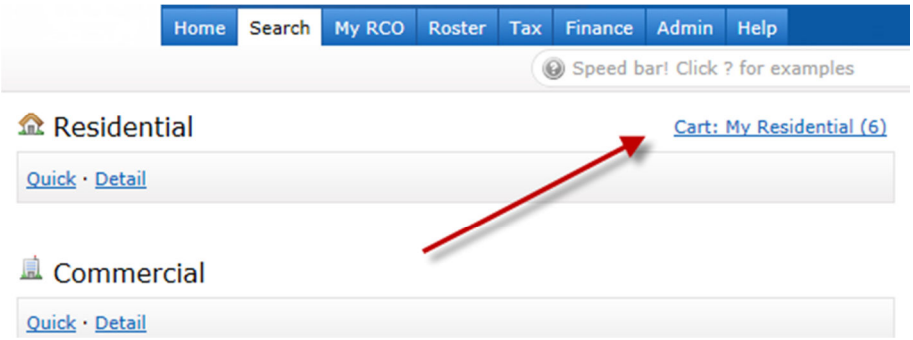
The example below shows 3 new listings added to the Residential Cart which already contained 3 listings.



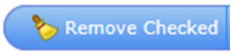
To add to a Contact Cart, simply choose that Contact on this drop down list:



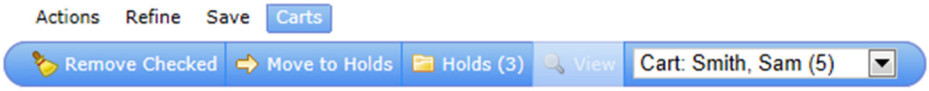
There are very handy one-click links to your Property Type and Roster carts on the main Search page…



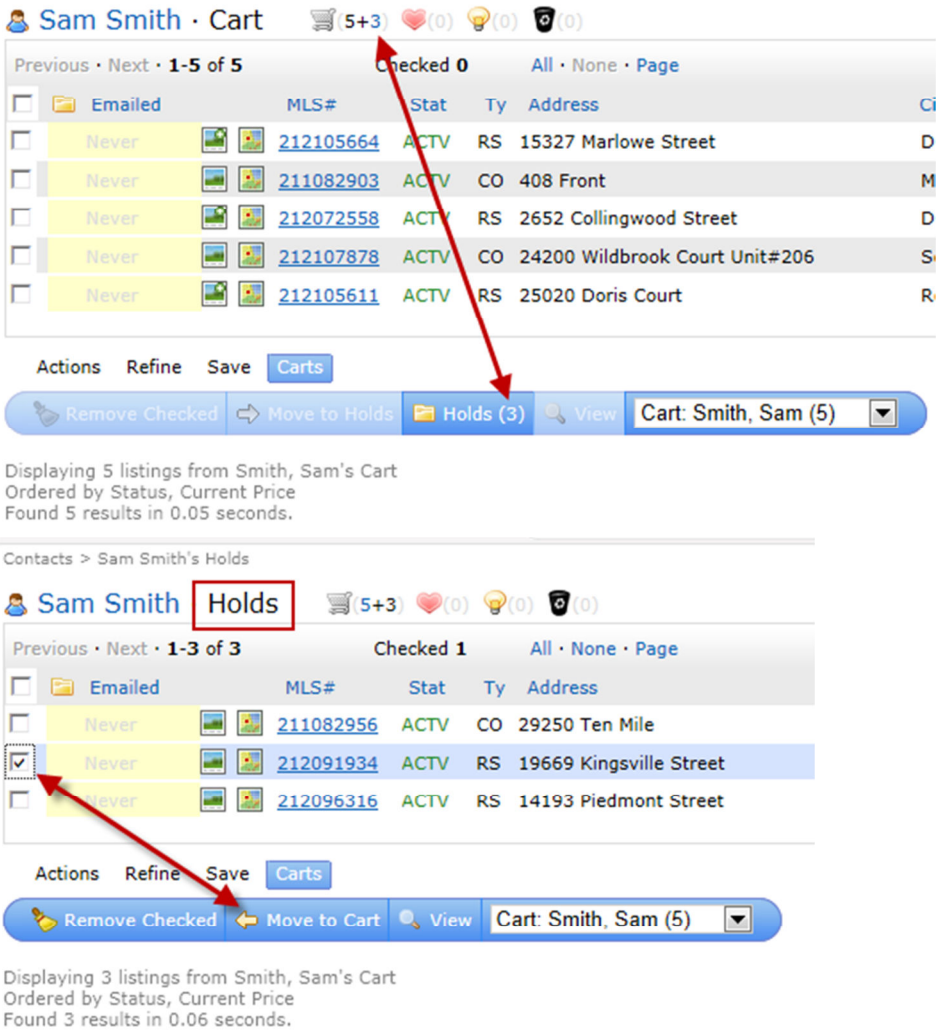
…and on your Home page.

To remove listings or roster entries from your cart, View the cart, check the entries to be removed and click on 

Contact Carts have a special HOLD area which provides an optional way to segregate listings into two categories: main cart and Hold area. While viewing the Contact Cart, check listings to Hold and click on Move to Holds. The Cart count will display as only those listings in the main cart.



To view the Holds and possibly move them into the main cart, click on



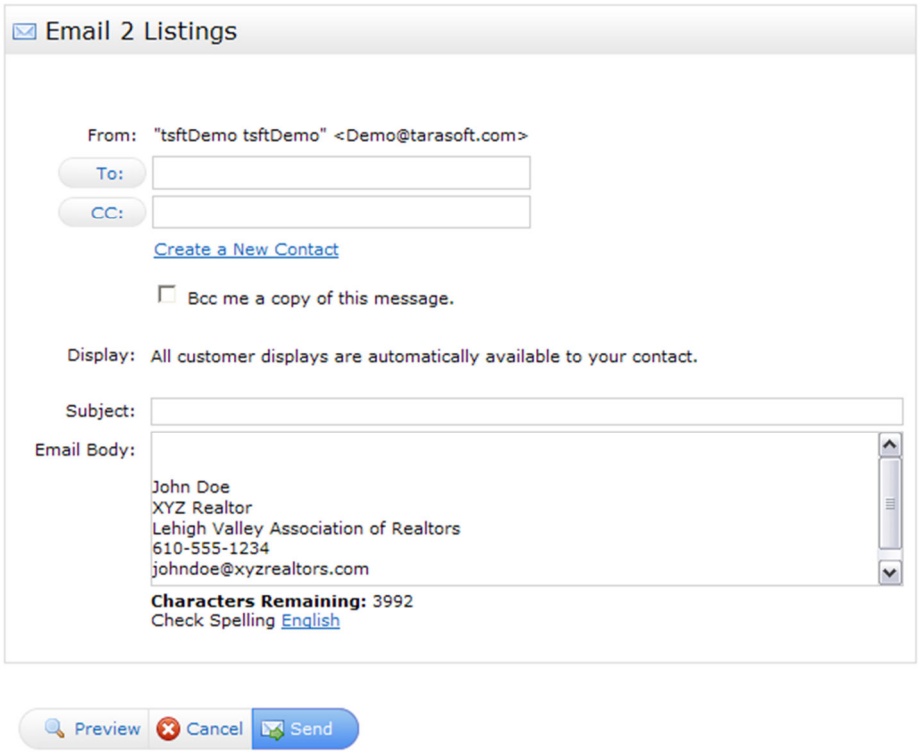
Chapter 12: Direct Emailing

Matrix allows you to easily email listings to your clients. Before you go to the email page, you must select the listings that you would like to email from your Search Results page.

1. Click the check box next to each listing to make your selections. **Note:** The Email button will be "greyed out" until you select at least one listing.

2. Once you have made your selections, click on Email

button to go to the Email page.



At the top of the Email page is the number of listings that you have selected to email from Matrix.

You can choose to preview the listings before you send them. The Preview button is located at the bottom of the screen. Next you will see the "Send" and the "Cancel" buttons which are also located at the bottom of the screen. If you decide you don't want to send an email at this time you can click on "Cancel" to return to the previous page.

To create a new contact, select the link "Create a New Contact". This allows you to add a Contact directly into your Address book.

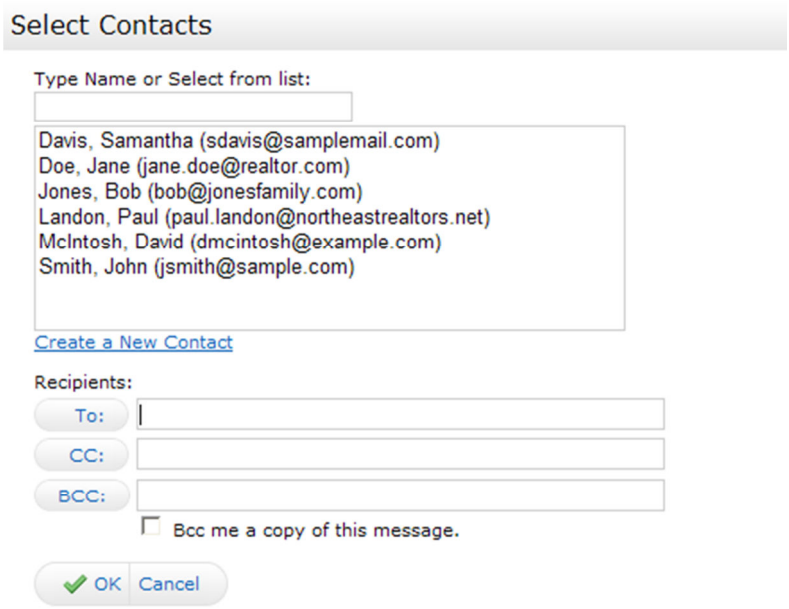
To assign an existing contact to your email, simply click on the

or

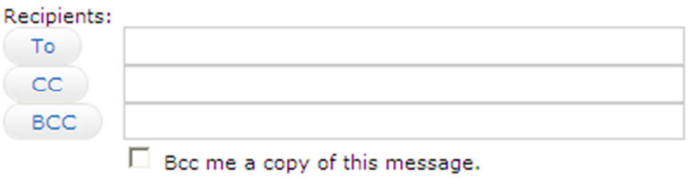
buttons. All of the contacts you have saved in Matrix will be visible in this box. You can also start typing the

name of the contact you wish to send the email to. All contacts that start with those letters will appear.

3. To select a contact: Click on the contact's name. To select more than one contact hold down the **CTRL** key while clicking on the additional contact names. **Note:** The contact's name is associated with their email address.



If you are emailing listings to individuals that are not on the Contact List, type their email addresses in the To, CC or BCC field. The BCC field is hidden by default.

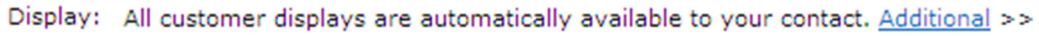


The fields shown above work the same in Matrix as they do in your regular email program. Here is a brief explanation of what each of these fields is for:
To: Enter the email address of the person you are sending the message to.
CC: (Carbon Copy) – The addresses in the CC: box will receive a copy of the email.
BCC: (Blind Carbon Copy) – The addresses in the BCC: box will receive a copy of this email, but their email addresses will be hidden from the other recipients.
Note: Multiple addresses can be entered by separating them with a comma or semi-colon.

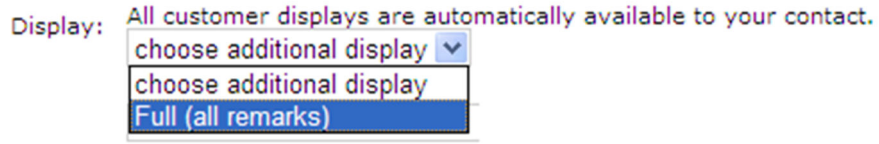
4. You have the option to select "BCC me a copy of this message". This feature will also send you a copy. A more efficient way to see what has been sent to your clients is to use the Email History under the My Matrix tab.

5. Type in the Subject: box the topic of the email.

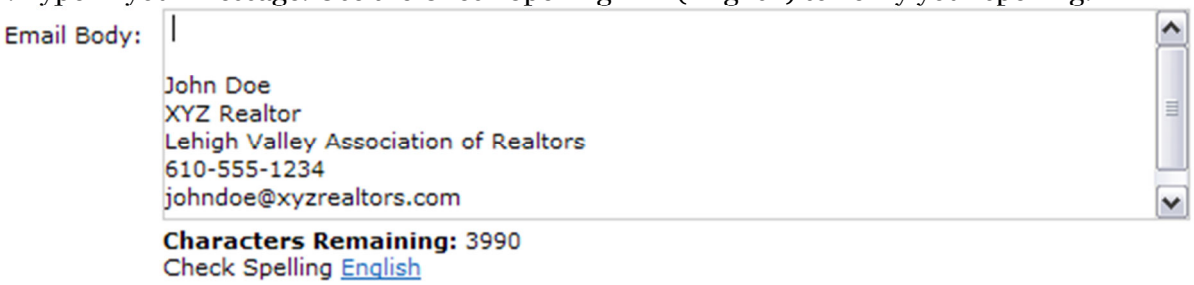
6. Your client will have the option to choose from a drop down list which display they wish to view the listings in.



Only client copy reports will be sent to your client **UNLESS** you click on the "Additional" Link. By clicking on the additional link a drop down list will appear. The drop down list gives you the option to select the "Full (all remarks)" display. By selecting the "Full (all remarks)" display you will be giving your client the option of viewing the Agent copy of the listing, meaning they can see things like sellers name, selling/listing agent information, ETC.

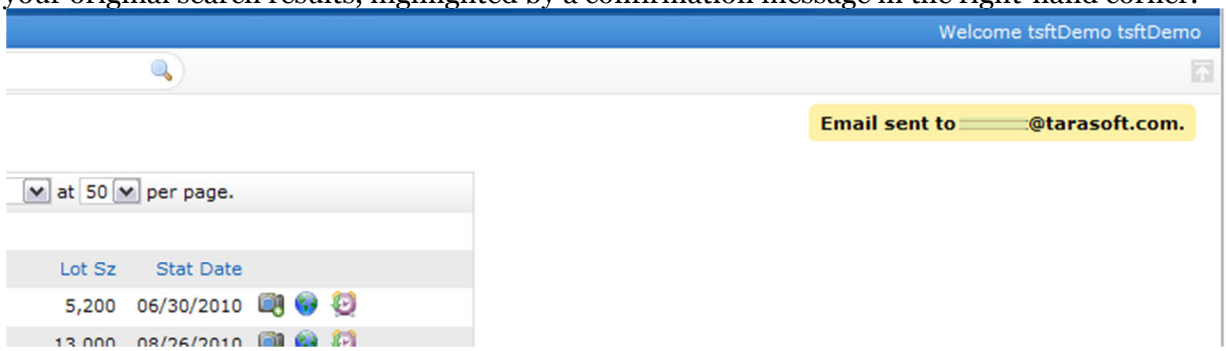


7. Type in your message. Use the Check Spelling link (English) to verify your spelling.



8. See Chapter 3 - Settings to setup your signature for future emails. If you have not previously saved an email signature, you can enter what you like here.

9. Click the Send Email button to send the email. After the email is sent you will be taken back to your original search results, highlighted by a confirmation message in the right-hand corner.

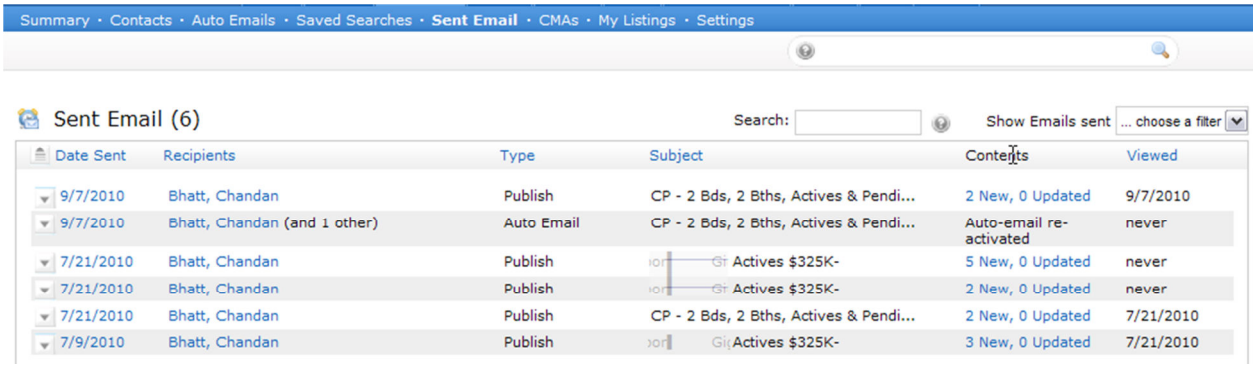


Keep in mind that this message indicates that the message was sent, not that it was received.
Note: If you have emailed to an invalid email address, a notification will be sent to your public email account. If preferred, review the Email History in the MyMatrix section.

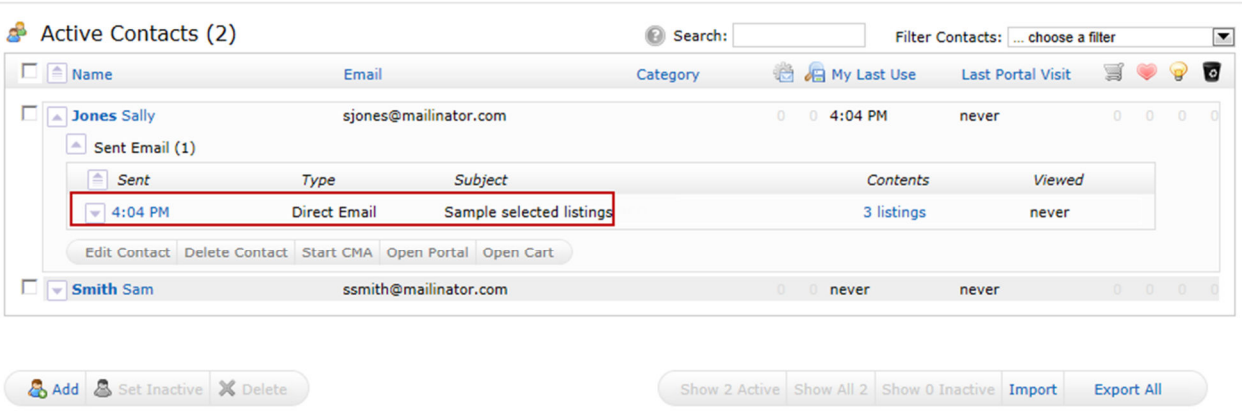
10. To return to the previous search. Click on "OK" button

Email History

Matrix keeps track of all emails you send through the system for 90 days. You can view your email history two separate ways. To view your email history, click on the My Matrix tab and then the Sent Email link.

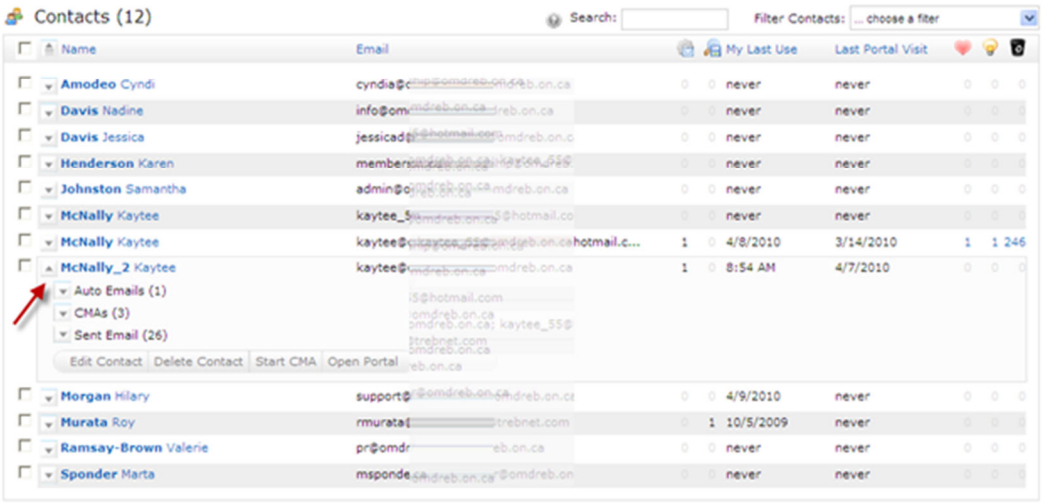


You can also view the Email History under the My Matrix, Contacts link.

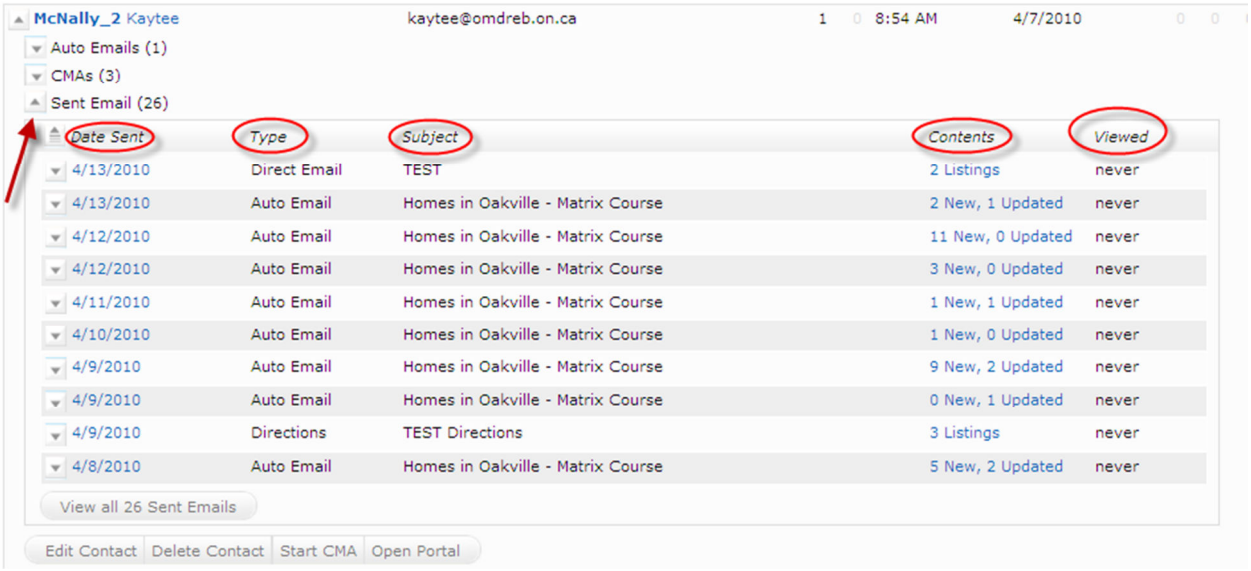


To view the Email History through the Contacts link:

1. Click on the My Matrix Tab
2. Click on the Contacts Link
3. A list of all contacts will appear
4. Next to each contact there is a drop down arrow
5. By clicking on the drop down arrow a list of all items that you have set up for that client will appear. From here you can view things like CMA's, Sent Emails, and Auto Emails that you have attached to that client.



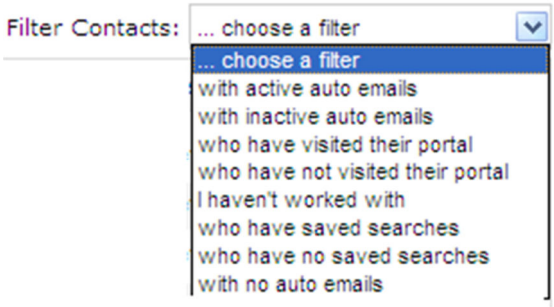
6. Each item will have another drop down arrow. To view the Email History click on the drop down arrow next to "Sent Email"



7. By clicking on the drop down arrow a list of all emails that have been sent to your client will appear. Below is an explanation of what each heading means

- **Date Sent** – Date the email was sent
- **Type** – What type of email you sent. This can be Direct Email, Auto Email, or Directions.
- **Subject** – What the email was about
- **Contents** – How many listings were in that email **Note:** By clicking on the link underneath the Contents header you can view the listings that you sent to that client in that email.
- **Viewed** – Last time the client viewed the email

You can also Filter your results. To set the filter, click the Filter by drop down box:
Example: By Clicking on "With Active Auto Emails" Matrix will automatically give you a list of only contacts that have Active Auto Emails.

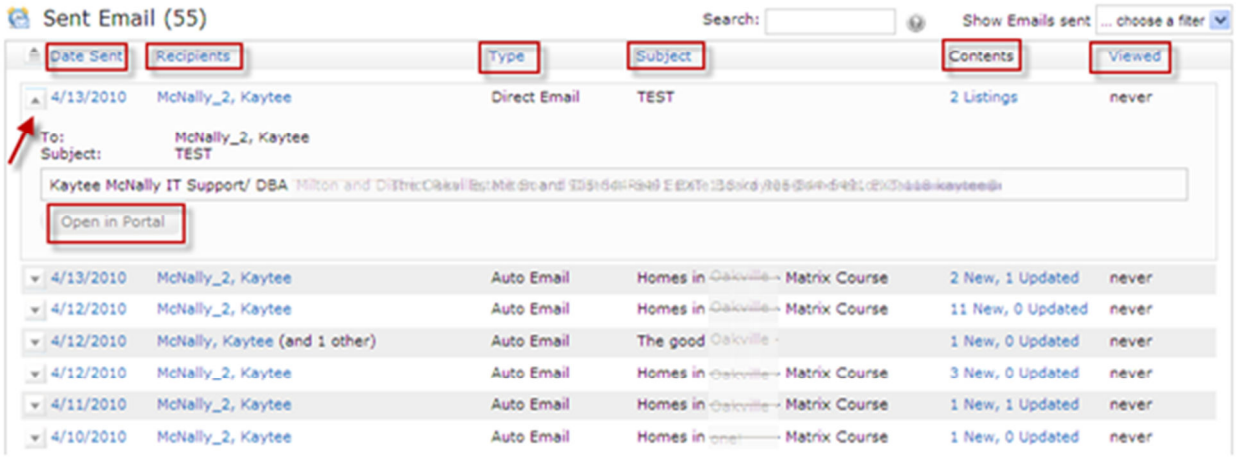


You can also Search for a contact using the "Search" field. In this field you can enter in any combination of letters to bring up clients.

To search Email history by "Sent Emails":

1. Click on the My Matrix Tab> Sent Emails
2. This will bring up a list of all emails that you have sent through Matrix
3. By clicking on the drop down arrow next to a sent email the details of that email will appear. From here you can also click on the "Open in Portal" link this will open up the "Portal" window, showing you all of the listings that you have sent to your client. You can also see the listings that your client has put in the separate folders. For more information on the folders please see Chapter 12 Auto Emails
4. There are 6 different headings on the Sent Email screen. Below is an explanation of what each heading means

- **Date Sent** – Date the email was sent
- **Recipients** – Who you sent the email too
- **Type** – What type of email you sent. This can be Direct Email, Auto Email, or Directions.
- **Subject** – What the email was about
- **Contents** – How many listings were in that email
  - **Note:** By clicking on the link underneath the Contents header you can view the listings that you sent to that client in that email.
- **Viewed** – Last time the client viewed the email



When a sent email in your history section goes beyond 90 days old, Matrix will automatically drop it from your list.

Chapter 13: Accessing Saved Searches/Auto Email

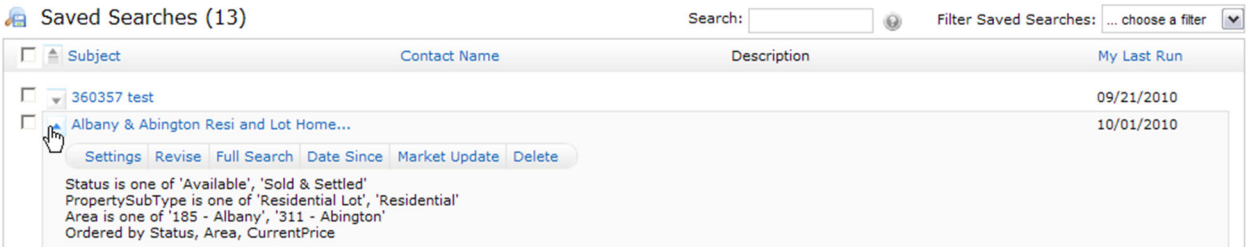
Saved Searches

This section contains all your previously saved searches. This link is where your Saved Searches are maintained and also where you run your market updates.

1. You can access your saved searches by clicking on the "My Matrix" tab and clicking on the Saved Searches link or indirectly through Contacts on the menu tab first.

Once you are on the "Saved Search Screen" you will see a list of all searches that you have saved within Matrix.

All saved searches are in order by the Subject line. By clicking on the drop down arrow next to each of your saved searches a details section will appear.



The details section gives you a brief explanation of the criteria that you have set up. This section also gives you the ability to change the options that you currently have set up. Below is a list of all of different functions you can do:

Settings - The settings button gives you the ability to change any of the settings that you have set up for that search, such as the Search Name, Contact you have attached to the search, and to "Enable as a Hot search on the Home Tab". "Enable as a Hot Search on the Home Tab" just makes the search easily accessible on the Home Page of Matrix.

Revise - The Revise button gives you the option to revise the search criteria for that search

Full Search – The Full Search button shows you all of the listings that you have saved within that search to date based on your current parameters.

Date Since – The Date Since button gives you a list of all of the New or Updated listings from that last time you clicked on this button

Market Update – The advanced market update section allows you to optionally choose an update type and/or update date range in combination with the criteria of the original search.

Delete – The delete button will delete this saved search

Revising the Search Criteria
To revise a search criteria follow these steps:

1. Click on the **Revise** link. This will take you to the search screen with your original search parameters all filled in.
2. Make changes to the search parameters.
3. Click the Save button.

Running a Full Search
To run a full search based on your current parameters, select the Full Search link. This will show you all of the listings that you have saved within that search to date based on your current parameters.

Running Date Since Search
To run a Date Since search for all new and updated listings since you last ran the search, follow these steps:
1. Click the Date Since link.
Matrix will run the search and take you to the search results page.
2. Click the Back to Saved Searches link at the top of the screen to go back to your Saved Searches list.
The saved search timestamp has automatically been updated plus it will list how many listings since the last run.

Market Update
Saved Searches include a Market Update link to the right of the Date Since link. The Market Update's purpose is similar to that of the Date Since link: to tell you what's new, re-priced or back-on-market.

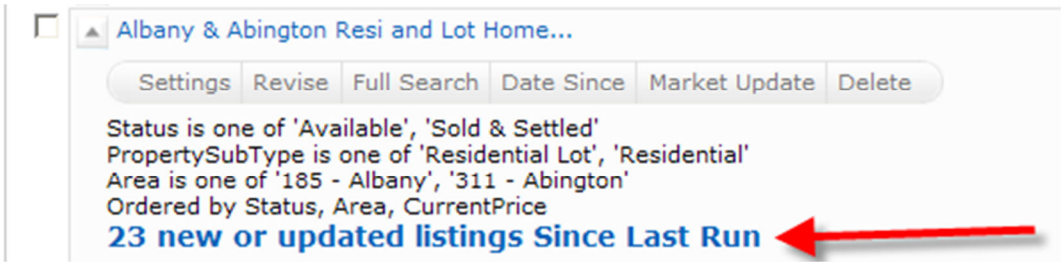
It differs from the Date Since link in that it allows you to either **use the Last Run date that the Date Since link uses or to pick your own time period instead** - a great way to review what's happening in this market segment for a specific period of time.

If you decide to pick your own time period, you can specify it in different ways:

- From May 1 to now: 2013/05/01+
- From May 1 to May 31: 2013/05/01-2013/05-31
- The last 30 days: 0-30

When you run the Market Update, you'll see all the new, re-priced or back-on-market listings for the time period you specified. As with Date Since, these results are initially presented in the usual **Single Line display**.

Once you've run the Market Update and checked the results, when you click the "Back to Saved Searches" link, your saved search will show a reminder link of what you've found like this: "9 new or changed listings. Date Changed is between 2013/09/02 and 2013/09/01". These links will remain available for you to return to for the rest of your Matrix session.



To remind you when you last clicked the Market Update link (or Full Search or Date Since links), this date and time is recorded on the line beneath the links, just as described above for Full Search / Date Since.

Using Market Update

You can use Market Update to **examine results before emailing**, just as described above for Full Search / Date Since.

You can also use Market Update to quickly **catch-up on what's new** for your saved searches. If you've been away for the weekend you can run the Market Update on Monday to see what's changed by specifying an update date range of, say, 0-2 (i.e. today, yesterday and the day before).

The Update Selected Button

To save you time, the Update Selected button allows you to **run a Market Update across several saved searches at once**. Check the saved searches you're interested in catching up on (or select them all with the Select All button), then click Update Selected. This will take you to the Market Update screen and allow you to either **enter a particular date** to be used for all selected saved searches or allow you to **use each saved search's own last run date**.

When you use Update Selected to run several saved searches, you'll be immediately returned to the saved search screen. Then just run down the list of saved searches to view and/or click on the **reminder links** that you're Market Update has just generated.

Deleting a Saved Search

To delete a saved search, follow these steps:
1. Click in the check box to the left of the Saved Searches you want to delete.
2. Click the Delete button and confirm the deletion.

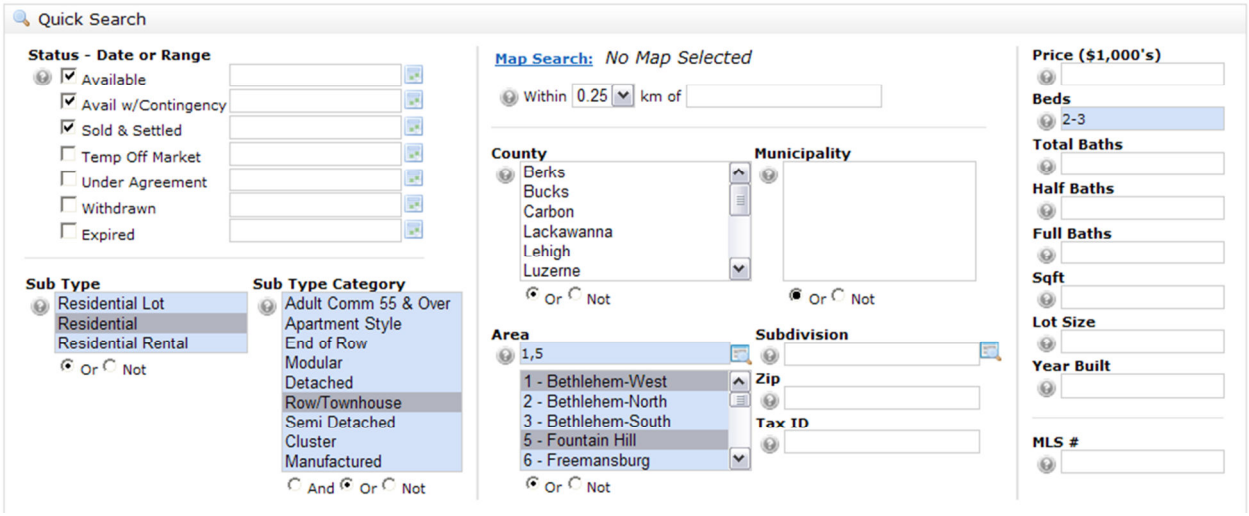
Auto Email

Auto Email – What is it?
Auto Email allows you to set up a saved search to automatically email new listings and listings that have changed in status or price to a contact. Matrix will send them out as soon as they are entered into MLS. As a result, your Contact will receive up to date listings based on the email schedule that has been set up.
Note: There is a limit of 500 listings that can be sent per email.

Setting up an Auto Email

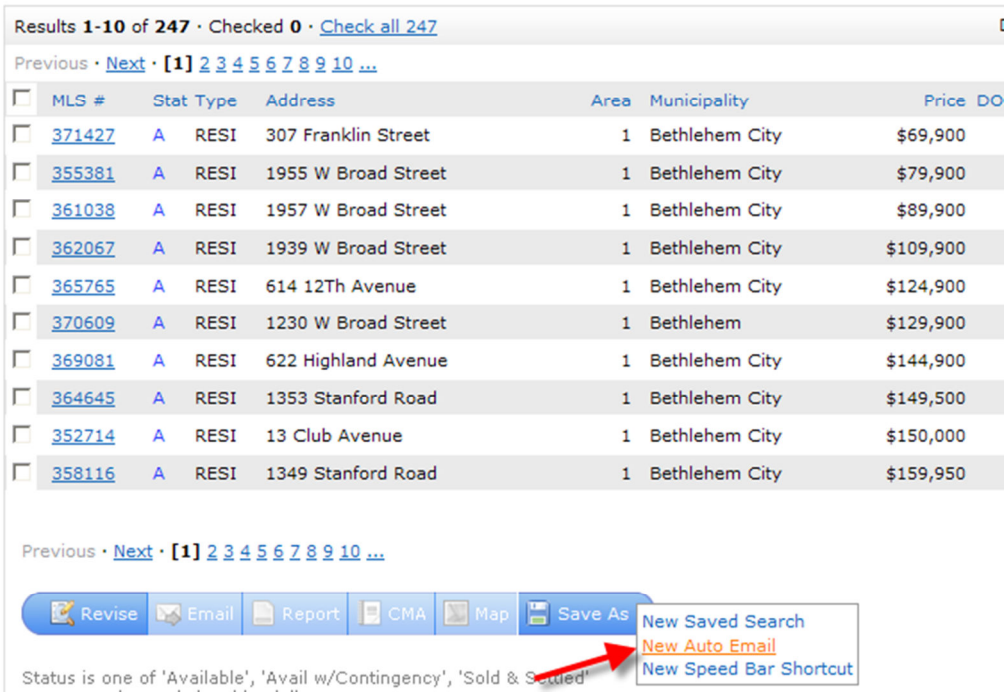
To set up a new auto email follow the steps below:

1. Click on the "Search" Tab
2. Click on the Residential General link (If setting up Commercial or Vacant land click on the corresponding General link)
3. Enter in all criteria that your client is looking for. (Example: Available, Avail w/ Contingency, Detached, Albany & Abington areas, 500+)

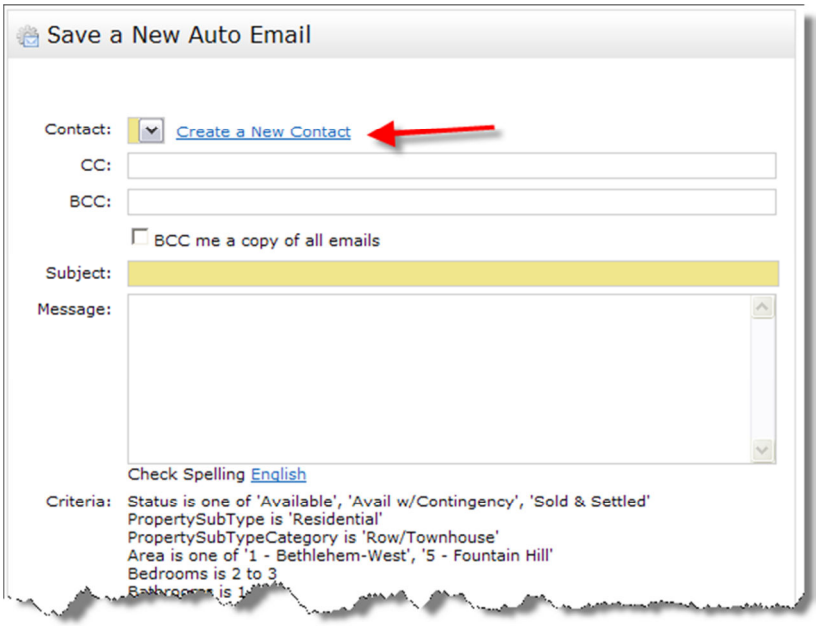


4. Click on the Results button located to the bottom of the Search Screen
5. At this point it is very important NOT to narrow your search results. By narrowing your search results matrix believes that you only want to send updates on those listings. If your search return too many listings to send to client at once you can either "Revise" your search by clicking on the "Revise" button located at the bottom of the search screen, or you can select the listings that you do not want to send to your client and "Discard" them. Discarding will not affect your auto email the way Narrowing will.
6. Once you have all of the listings results that you would like to send to your client click on the "Save As" button located at the bottom of the search screen. By clicking on this button a pop up box will appear. At this point you can choose to Save As " New Auto Email"

1. **NOTE:** There is a max limit of 500 listings allowed to be sent in an email. This option will be disabled if this limit is exceeded.

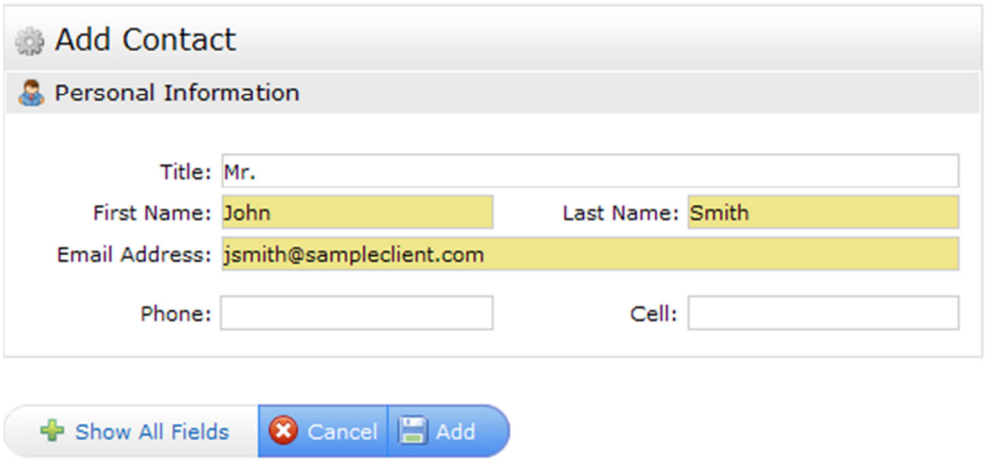


7. This will bring up the "Auto Email Settings



8. Begin by adding a **Contact**. By clicking on the drop down arrow next to the "Contact" field a list of all your contacts will appear. Select the contact you wish to send the Auto Email to. If your Contact is not in this drop down list click on the link "Create a New Contact" next to the Contact Field. This will open a pop up

box where you can add in your client's information. **NOTE:** All Yellows fields found in Matrix are Mandatory fields and **MUST** be filled out in order to proceed. Once you have added all information click on the "Add" button.

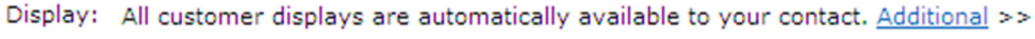


9. You can now choose to "CC" (Carbon Copy), "BCC" (Blind Carbon Copy), or "BCC me on all emails". By checking off the "BCC me on all emails" you will receive a copy of all emails that are sent to your client. (**Note**: The emails will go to the email address that the Board has on file for you. For more information on how to change this address please contact the Membership department at the Board Office)

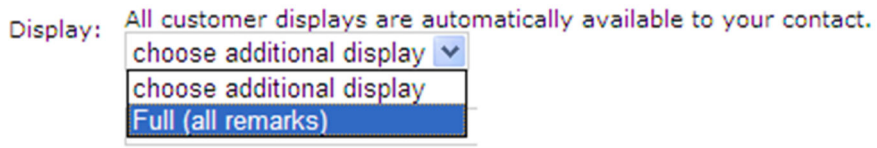
10. **Subject line**: The Subject line is the title or subject of the e-mail

11. **Message:** The Message field is the Body of the email. This will only go out on the first email to your client.

12. **Display:** Your client will have the option to choose from a drop down list which display they wish to view the listings in.



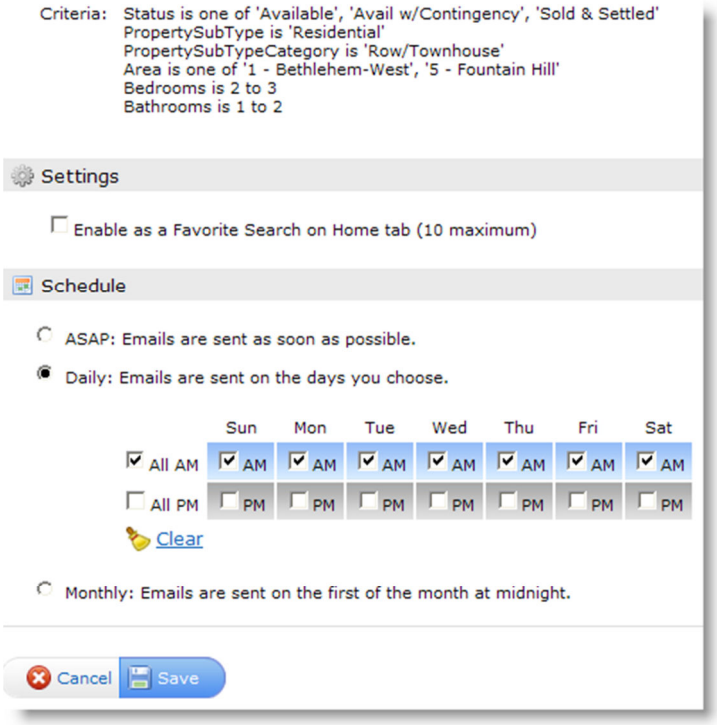
Only client copy reports will be sent to your client **UNLESS** you click on the "Additional" Link. By clicking on the additional link a drop down list will appear. The drop down list gives you the option to select the "Full (all remarks)" display. By selecting the "Full (all remarks)" display you will be giving your client the option of viewing the Agent copy of the listing, meaning they can see things like sellers name, selling/listing agent information, ETC.



13. **Make available for Reverse Prospect**: (See Reverse Prospects below or click on this Reverse Prospects for more information)

14. **"Enable as a Hot search on the Home Tab":** "Enable as a Hot Search on the Home Tab" just makes the search easily accessible on the Home Page of Matrix.

15. **Criteria:** The next section is brief explanation of the criteria that you have chosen to set your client up for. If this information is incorrect go back to the search results page and click on the Revise button to revise the criteria.



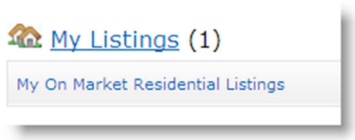
16. **Schedule**: The schedule is when you would like your client to receive the emails. You can choose:
    ASAP: when the listing becomes available on Matrix your client will receive an email (When choosing ASAP you want to be careful on what criteria you have selected. If you have set up a very broad search then your client may receive multiple emails a day)
    Daily: Choose which days and either AM or PM. Whichever days and times you select is when your client will receive an email.
    Monthly: All listings for the month are compiled and Emails are sent on the first of the month at midnight.
17. Click "Save"

Reverse Prospects

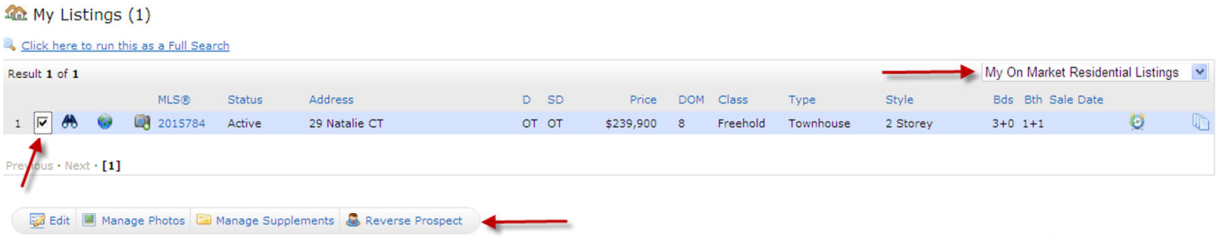
Reverse Prospecting is only available on Active on Market Listings that have been loaded onto the Matrix System. Once you have submitted your listings on Matrix, you can find out what agents have clients set up on auto-email that match your Active on Market Property you have inserted onto the system. However, you cannot see any client information concerning those auto emails.

To retrieve your Reverse Prospects:

1. Click on the My Matrix Tab
2. Click on the "My Listings"

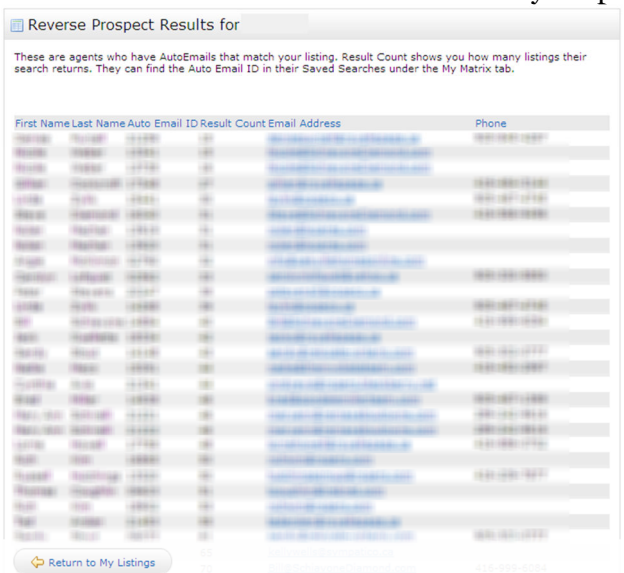


3. Be sure that you have selected "My On Market Residential Listings" from the top right hand corner. Check off the listing that you wish to view Reverse Prospect for.



4. Click on the Reverse Prospect Button

5. This will produce a list of all agents who have clients set up on Auto Email that Match your property.

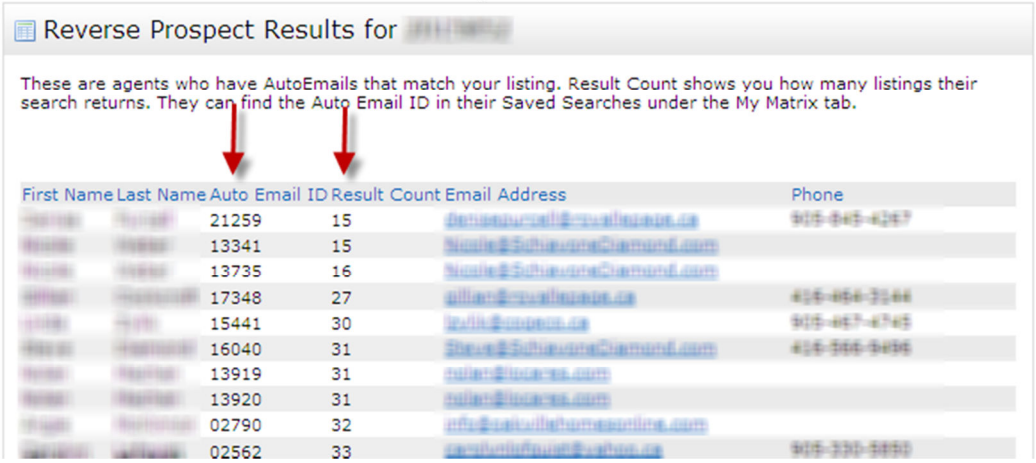


Reverse Prospecting will NOT give you any Client information. The only information given is the agent information.

There are two important fields to pay attention to within the Reverse Prospect. Below is an explanation of these fields:

Auto Email ID: The Auto Email ID field is a unique number given to each auto email that is set up. This number helps agents identify which client/auto email you are inquiring about. The agent who has the auto email set up will find the matching number under the "My Matrix", "Auto Email" section. See screen shot below.

Results Count: The Results count is also very important to pay attention to. This number represents the number of listings returned in a search that match the client's criteria. The higher the number in the results count the more matching listings that agent has found for their client. The lower the number in the results count the less listing's the agent has found for their client. **Example**: If the results count says 500 that agent has set their client up on a very broad search area. Chances are the client is not that serious in purchasing a home. If the results count says 2 there were only 2 listings (including your own) that match what that agent's client is looking for. Chances are this client is a serious buyer.

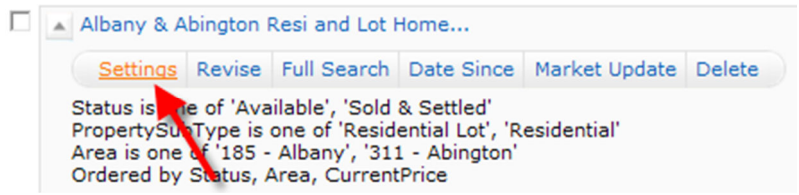


Convert a Saved Search into an Auto-Email

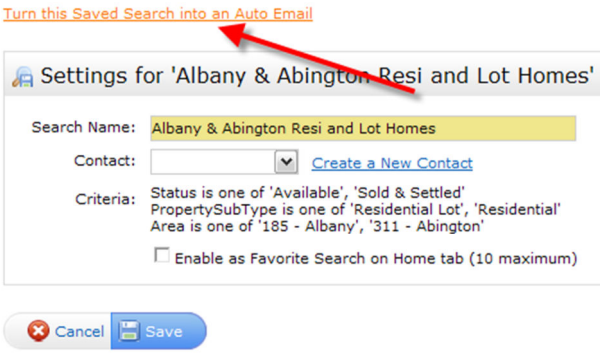
Saved searches and auto-emails work are essentially interchangeable. When enabled, a saved search can convert into an auto-email while disabling an auto-email will convert it back into a saved search. They are both accessible via the My Matrix tab.

If you already have a saved search which you would like to activate as an auto-email, first navigate to the saved search in question.

1. Click on the My Matrix Tab
2. Click on "Saved Searches"
3. Click on the desired saved search to expand its options
4. Click 'Settings'



5. Click the top link 'Turn this Saved Search into an Auto Email' under the Settings page

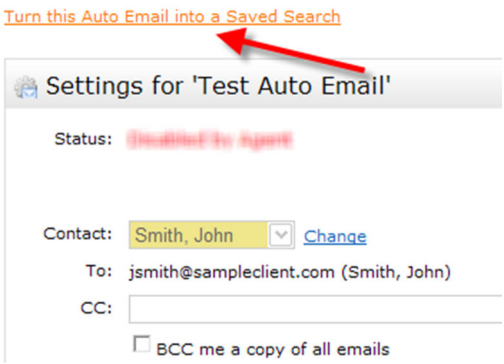


6. You will be taken to the auto-email screen where you can configure settings and the schedule for this search before activating it as an auto-email. Make sure to press the **Save** button when done.

Convert an Auto-Email into a Saved Search

Conversely, you can also deactivate an existing auto-email and convert it back into a saved search.

1. Click on the My Matrix Tab
2. Click on "Auto-Emails"
3. Click on the desired auto-email to expand its options
4. Click 'Settings'
5. Click the top link 'Turn this Auto Email into a Saved Search under the Settings page



6. Make sure to give your saved search a 'search name' and press "Save".

Concierge

Setting up Concierge

When creating a new auto-email, you will also have the option of running it in concierge mode.

The differences between a regular auto-email and a concierge-mode auto-email:

- A regular auto-email will automatically update and email your contact based on your scheduler settings.

- A Concierge auto-email will first notify you of the updates (email optional) and then allow you to determine which listings to approve and reject for your client.

NOTE: Your clients will not notice any difference in the Matrix Portal between Auto-email and Concierge modes.

Set up a new Auto Email:

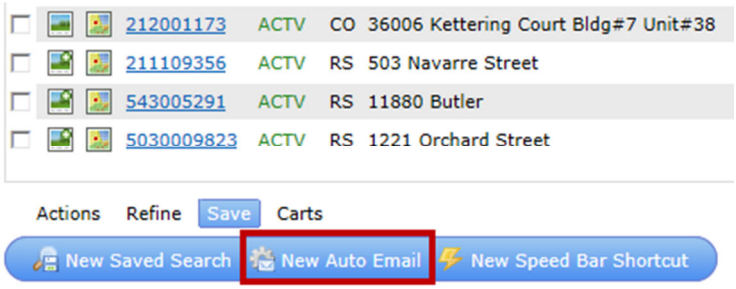
To set up a new auto email, follow the steps below:

1. Click on the "Search" Tab
2. Click on the Residential General link (If setting up Commercial or Vacant land click on the corresponding General link)

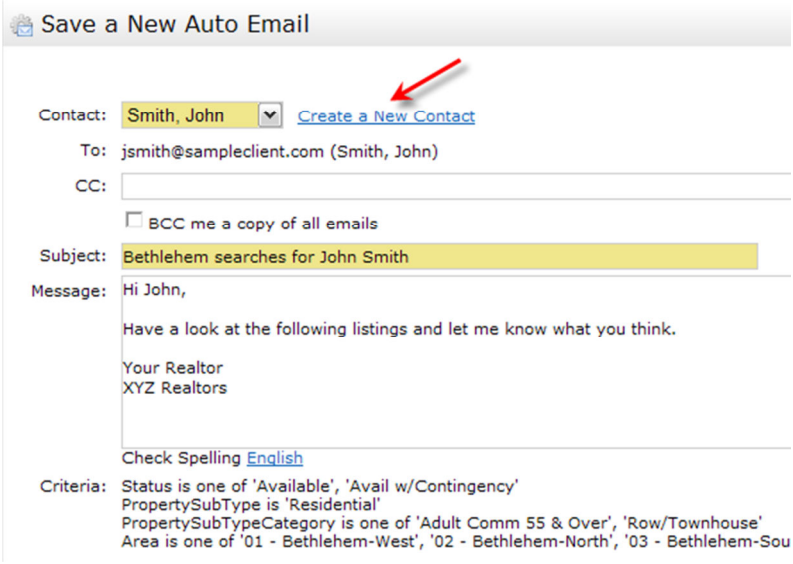
Enter in all criteria that your client is looking for (ie: status, area, price, type, etc.) and click "Search"

3. Once you have all of the listings results that you would like to send to your client click on the "Save As" button located at the bottom of the search screen. By clicking on this button a pop up box will appear. At this point you can choose to Save As " New Auto Email"

   NOTE: There is a max limit of 500 listings allowed to be sent in an email. This option will be disabled if this limit is exceeded.



4. This will bring up the "Auto Email Settings

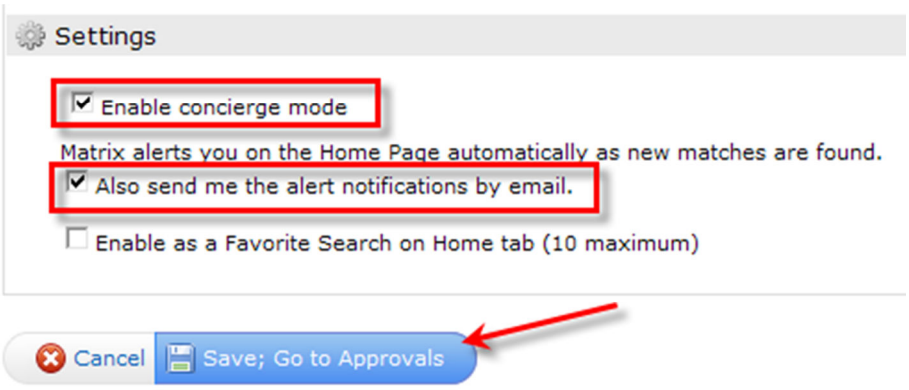


Click on the drop down arrow next to the "Contact" field to list all your existing contacts. Select the contact you wish to send the Auto Email to. If your Contact is not in this drop down list, click on the link "Create a New Contact" next to the Contact Field. This will open a pop up box where you can add in your client's information. **NOTE:** All Yellows fields found in Matrix are Mandatory fields and **MUST** be filled out in order to proceed. Once you have added all information, click on the "Add" button.

5. **Turning on Concierge Mode:**
Under the Settings section, simply click the "Enable concierge mode" checkbox.

NOTE: Selecting Concierge mode will automatically turn off/disable the Schedule settings. Updates to your client are now reliant on approvals from you. You also have the option of determining how you want to be notified about future updates to this auto-email. By default, you will always receive new notifications each time you log in to Matrix (from the home page). Click the 'Also send me the alert notifications by email' checkbox to be notified of new listing updates via email.

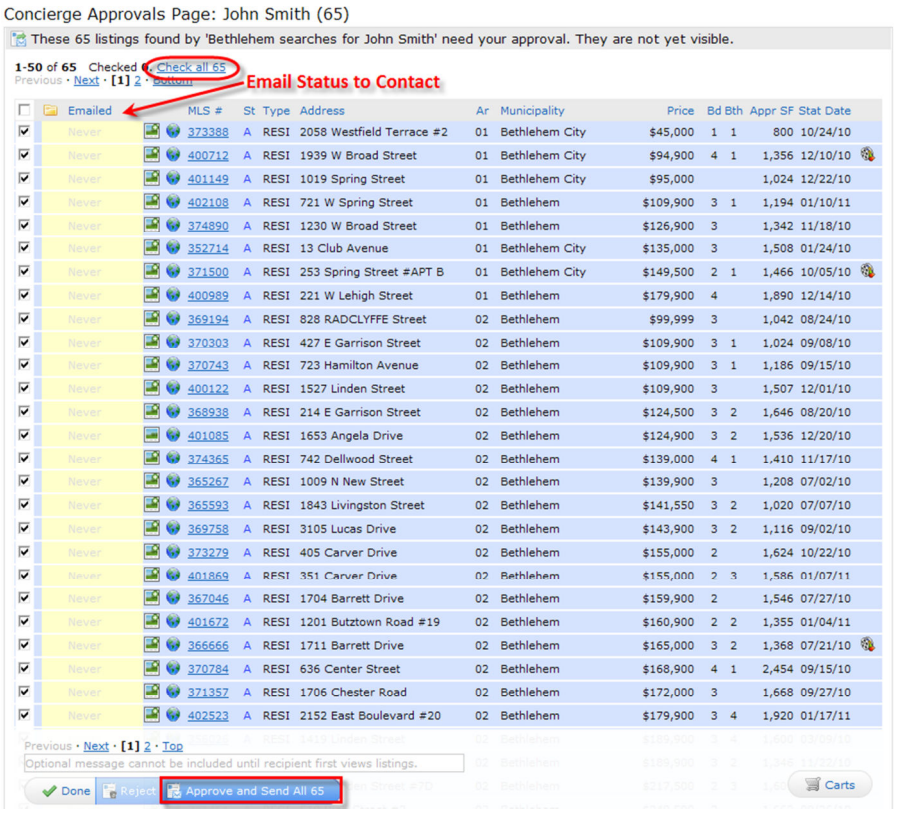
(*This is strongly recommended if you won't be checking direct Matrix notifications as often – you need to login to see these*)



6. To initialize this auto-email in concierge, simply click "**Save; Go to Approvals**".

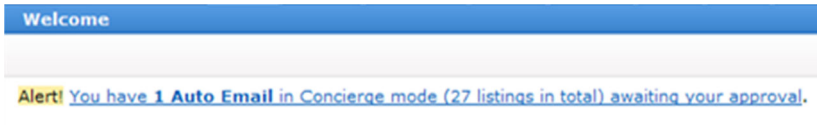
7. You will be taken to the Approvals page for the first time. This will display (in client mode) all prior listings you included when you first setup this auto-email. You have the option to uncheck all listings and select which listings you still want to include in the concierge auto-email.

8. If you are still satisfied, make sure all listings are selected and press the "**Approve and Send…**" button at the bottom. You can omit any listings by ensuring they are not selected before pressing the **Approve** button.



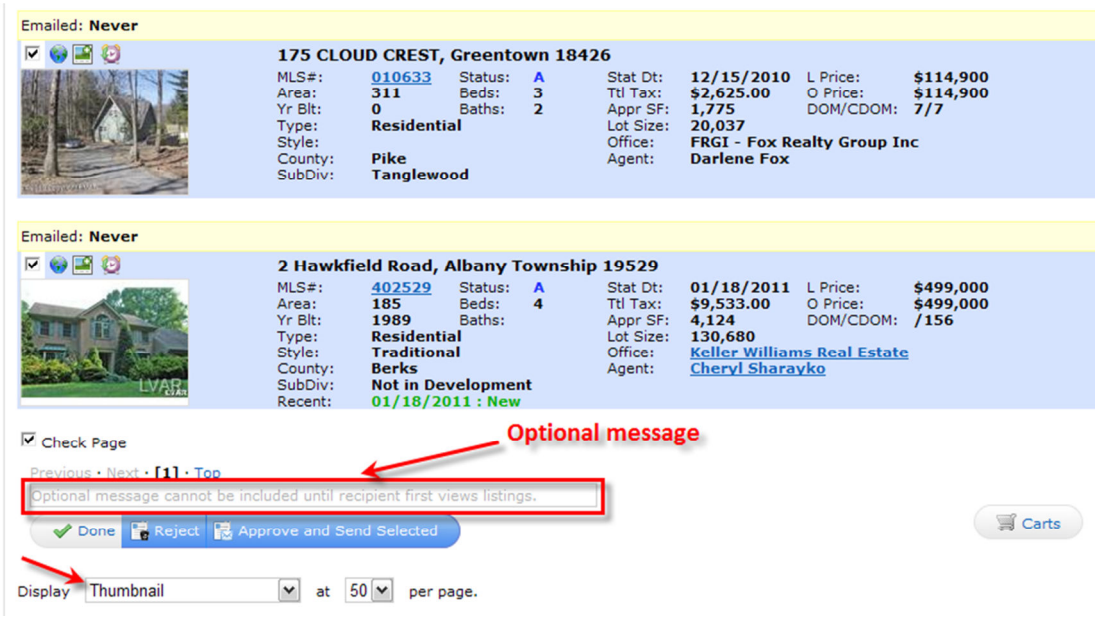
Continue Watching Concierge for Newly Matched Listings:

The concierge will become activated once the client has successfully received your email. You will also see a yellow alert on your Matrix home page:



Click the link to open the Concierge.

Once your contact has successfully received the first auto-email, you can then optionally type a message to them in the future about each set of listings that you send from the concierge.

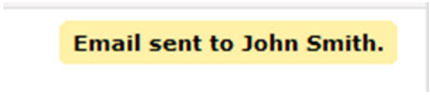


At the bottom of the page, you can also change the display mode to see other displays aside from Single Line.

Check the desired listings to email your contact; then click the **Approve and Send Selected** button. You can alternatively click the **Reject** button to permanently omit desired listings from this auto-email in the future.

**Bear in mind that these rejected listings will not ever be included in this particular concierge afterwards.*

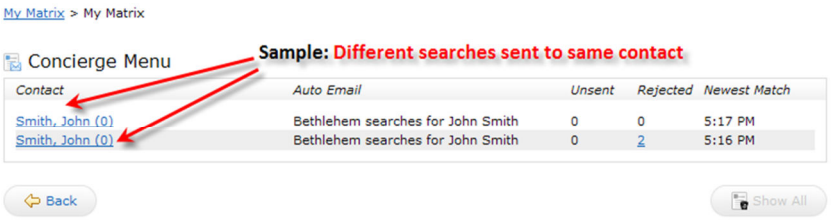
A temporary alert on the home page should display afterwards.



Managing Your Concierge:

1. Click on the My Matrix Tab
2. Click on "Concierge"
3. You will see each concierge you have currently setup:
   - Contact: Name of contact
   - Auto Email: Name of auto-email
   - Unsent: Number of unsent listings
   - Rejected: Number of rejected listings
   - Newest Match: Time of latest matches
4. Click on the desired Contact Name
5. This will display any and all as-of-yet unapproved or rejected listings

NOTE: You can send multiple different searches to the same contact. They will all be linked together to the same contact.



Client Portal Sample:

Why am I not receiving any updates in the Concierge?

In order to set up the portal, you must approve and publish at least one listing in the concierge. If you reject all of the matched listings, then you will not receive any updates for them. Instead of rejecting them, approve them and then your client can move them to the "discard" tab of the portal.

Look at the status on the far right of the auto-email under the My Matrix, Contacts page.

- **Green** is complete, meaning that Matrix is searching for listings and will add them to your concierge.
- **Yellow** means that the set up is not complete- either you emailed the listings directly to your client rather than waiting for the concierge, or you rejected all of the listings.
- **Red** means one to two possible issues have occurred:

1. Your client has "opted out" of receiving emails from you. If this was done unintentionally, follow the directions in our "My Client Accidentally Unsubscribed from Matrix Emails" user guide, under the Matrix help tab.

2. Your auto email search has gone over the maximum number of listings allowed. Please revise your search criteria and add additional criteria to limit your results. You can create more than one auto email search per client if necessary.

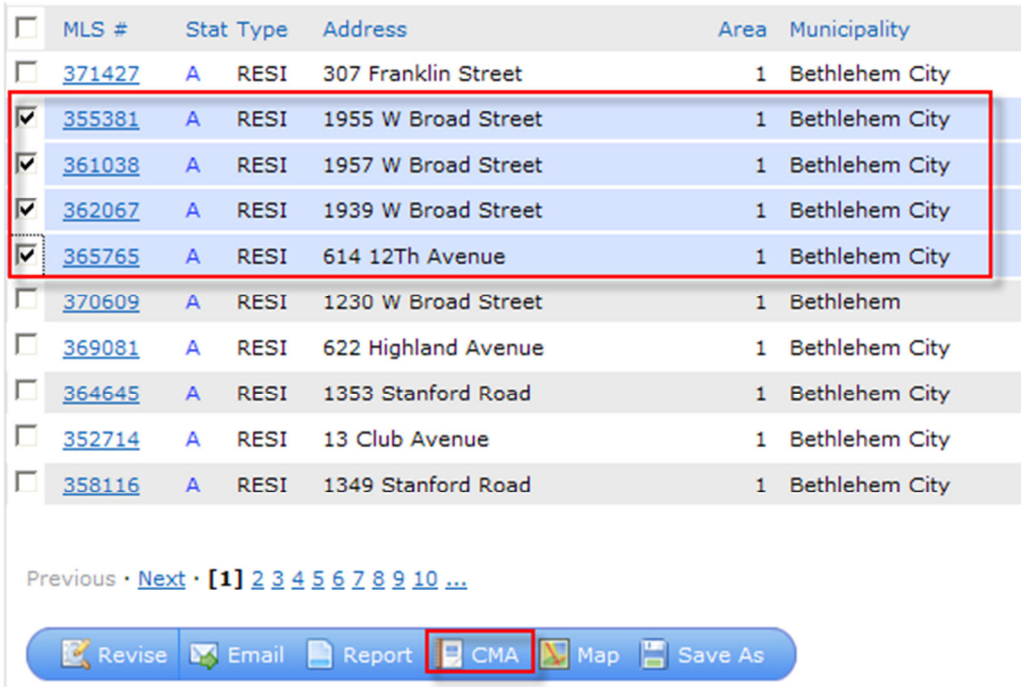
Chapter 14: CMA (Comparative Market Analysis) REPORTS

A CMA (Comparative Market Analysis) is an analysis of the value of a property by using comparable properties (Properties similar to your subject property in size, condition, area, ETC) to evaluate and determine the current market value of a property.

To prepare a CMA (Comparative Marketing Analysis) report you must first conduct a search for similar properties. (See Chapter 4-Performing Searches). Start by doing a search for one status (Active, Conditional. Sold ETC) try to avoid doing an Active and Sold search together. Once you are in your CMA you can always add in or remove listings. Example: Start off by using Active listings, later on in the CMA we will add Solds. Follow the instructions below to begin your CMA:

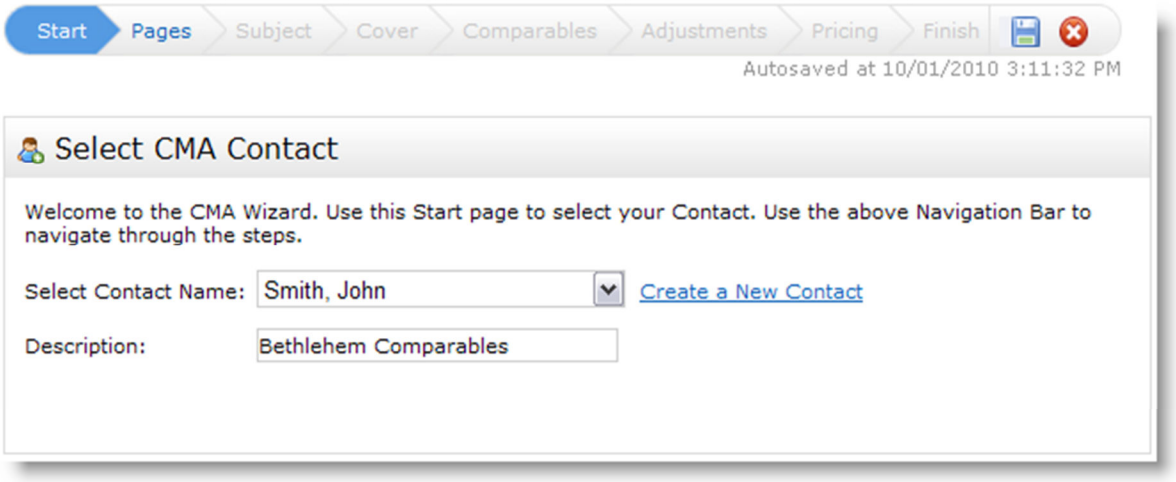
Once you are at the listing results page Check ☑ off all comparable listings that you wish to use for your CMA. At this point be careful on how many listings you choose to use. The more listings you select now the bigger your CMA will be.

Once you have Check ☑ off all comparable listings that you wish to use click on the CMA button located at the bottom of the search screen.



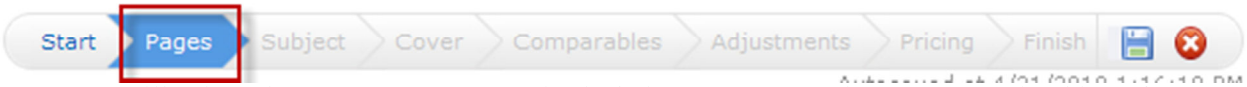
This will bring you to the CMA Wizard. The CMA Wizard takes you step-by-step through creating a CMA.

From the CMA Start screen, select the Contact Name, and type in a CMA Description.

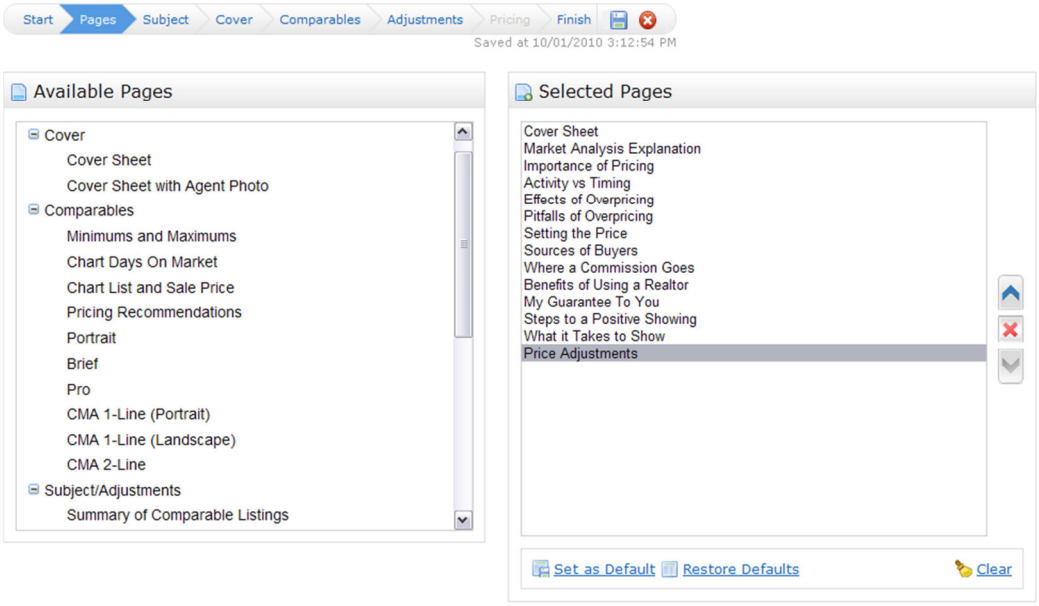


Save as you work!
The CMA will periodically auto-save your work. To manually save your work, especially if you plan to step away for a while, click the diskette icon on the right end of the CMA Wizard navigation bar.

Select Your CMA Pages
After completing the Start screen, click "Pages" to the right of Start on the CMA Wizard navigation bar.



Here you will select the pages you want to include in your CMA. They are organized into four categories: cover sheets, adjustments/subject, comparables/graphs, and static (standard pages that are always the same regardless of your data). Click the plus sign + next to a category to open it and view the available pages.
To select an available page, simply click once on the page name and it will appear in the Selected Pages box to the right.
To change the order of a page in the Selected Pages box, single click the page name, then click the blue up or down arrow on the right to move it.
To delete a page from the Selected Pages box, single click the page name, then click the red on the right to delete it. To remove all selected pages at once, click the "Clear" link at the bottom right corner of the Selected Pages box. If there is a core set of CMA pages that you usually select, you can **set those pages as the default** for that property type so that you don't have to reselect them every time. After you have selected your core pages, click the "Set as Default" link at the bottom of the Selected Pages box. Now those pages will automatically be selected each time you create a CMA for that property type. You can still add or remove pages to tailor any CMA to a particular client. As you are adding and removing pages, you can revert to your default set at any time by clicking the "Restore Defaults" link.



Below is an explanation of all pages within the CMA Wizard:

Cover Sheets

- **Cover Sheet**
  Standard opening cover page for your report
- **Cover Sheet with Agent Photo**
  Standard opening cover page for your report with your agent photo

Subject/Adjustments

- **Summary List**
  This page summarizes the comparable listings contained in this market analysis
- **Full**
  An appraisal style view of the comparables. Summary that includes averages
- **Price Adjustments**
  This page details the comparable listings contained in this market analysis as well as any manual data adjustments made by the user

Comparables

- **Minimums and Maximums**
  This page summarizes key fields of the listings in this analysis
- **Days on the Market Chart**
  This graph illustrates the number of days on market
- **Current and Sale Prices Bar Chart**
  This graph illustrates the list price, along with sale price in Sold listings
- **Brief Summary**
  This page summarizes the comparable listings contained in this market analysis
- **Pro Report**
  Brief description plus characteristics of each property. Sold price will be included if sold properties are selected
  Statistics for each status. Active, Conditional, Sold, etc
  Summary Graph/Analysis for average minimum and maximum prices

Cumulative Analysis
Sold Property Analysis
Property Summary

— **Pricing Recommendations**
This page suggests a recommended selling price based on a thorough analysis of your property
— **CMA 1-Line (Portrait/Landscape)**
Displays various calculations & summaries for comparable listings in single-line format
— **CMA 2-Line**
Displays various calculations & summaries for comparable listings in 2-line format

Static (standard pages that are always the same regardless of your data)

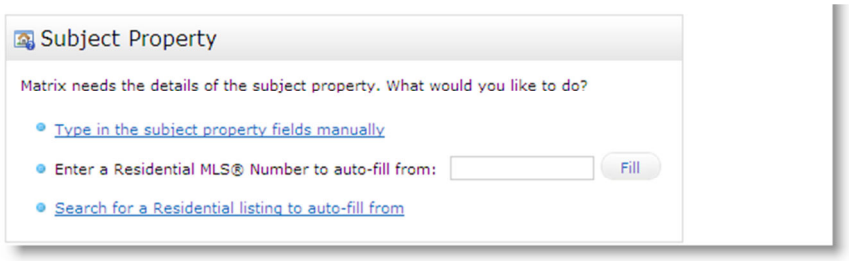
— **Explanation**
This is an explanation and overview of this market analysis
— **Importance of Pricing**
This chart highlights the importance of pricing correctly at market value
— **Activity vs. Timing**
This chart highlights the importance of pricing correctly at market value
— **Effects of Over Pricing**
This chart highlights the importance of pricing correctly at market value
— **Pitfalls of Overpricing**
Drawbacks of incorrectly pricing a property
— **Setting the Price**
Looks at the Seller's Desired Price and the Buyer's Desired Price
— **Sources of Buyers**
This page illustrates the primary sources of buyers for your property
— **Where Commission Goes**
How commission is divided amongst all of the parties involved
— **Benefits of a Realtor®**
Outlines the benefits of using a professional REALTOR® to sell your property
— **My Guarantee to You**
A performance guarantee
— **Steps to a Positive Showing**
Key steps to making a positive showing of your property
— **What it Takes to Show**
Additional showing instructions

Set the Subject Property

After selecting your pages, click "**Subject**" on the CMA Wizard navigation bar.

You have three options available for setting the Subject property information:

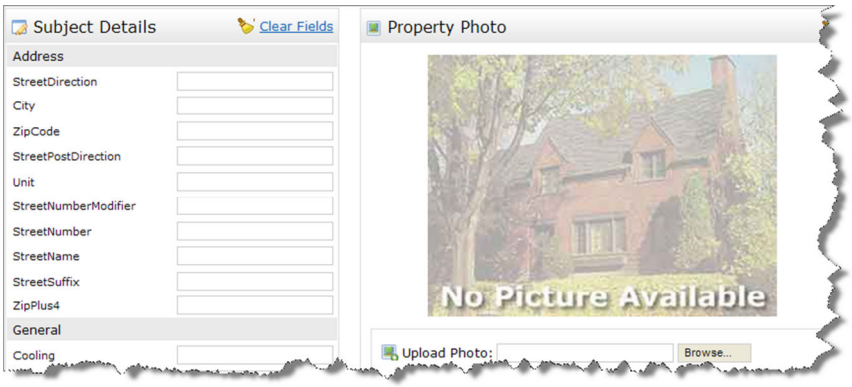
1. Type in the subject property fields manually;
2. Search Matrix for your subject property and then select it for auto-fill;
3. Type in the MLS number for your subject property to be auto-filled.



Manually fill in Subject Property

To Type in the Subject property fields manually click on the

Type in the subject property fields manually Link. This will open up a screen where you can manually go through the fields and type in the relevant information. You can also upload a photo of the subject property.

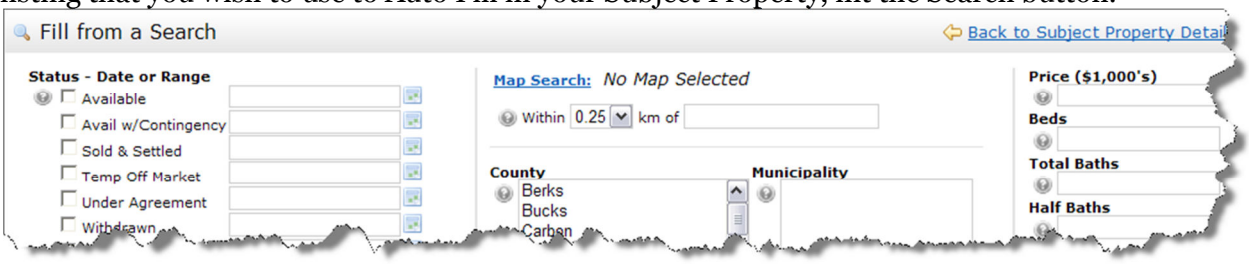


To Search Matrix:

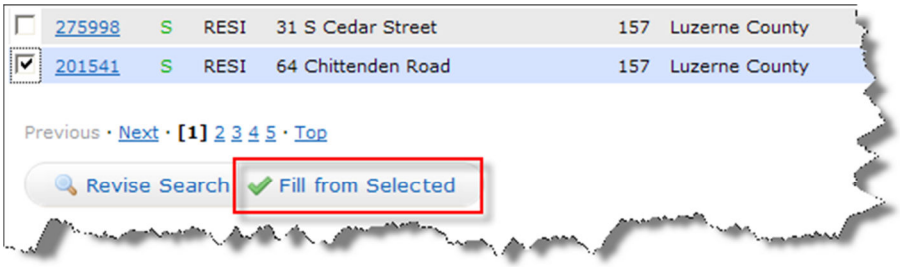
If you are unsure of the previous MLS number but know that the property was previously listed on Matrix you can choose to search for the property by doing a regular Matrix search (See Chapter 4: Performing Searches) and Matrix will auto fill in all information of the previously listing. This gives you the ability to go through all previous information and update/change the fields as needed.

To search for the property click on the link Search for a Residential listing to auto-fill from .

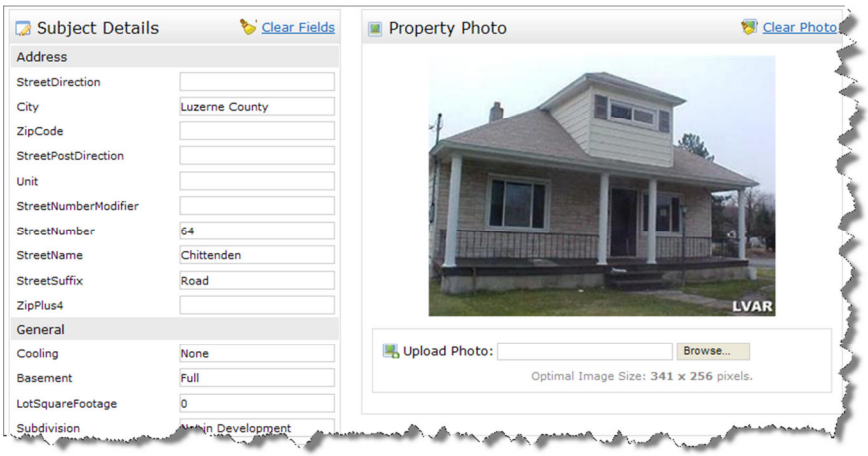
This will bring you to a search screen. Fill in all information required to pull up the previously listing that you wish to use to Auto Fill in your Subject Property, hit the Search button.



Once you are on your listing results page, Check off the listing that you wish to use and click on the “Fill from Selected” button



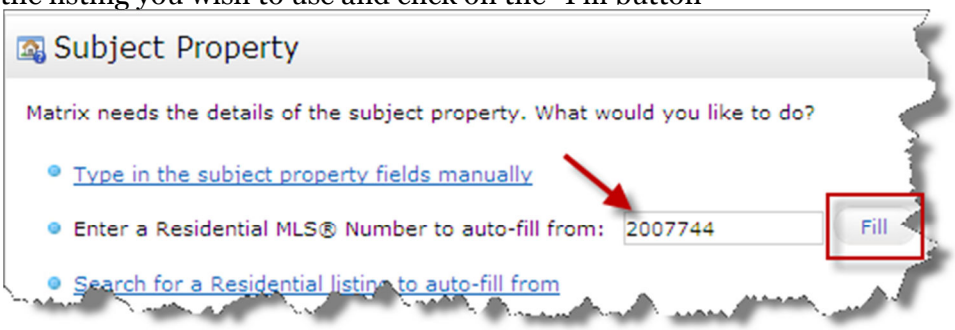
Now all fields for your subject property will be auto filled with the information from the chosen listing. At this point you will need to go through all fields and correct each field to make it relevant to the current home. You may also choose to "Clear Photo", "Browse" and "Upload" a new photo for a more up to date look of the home.



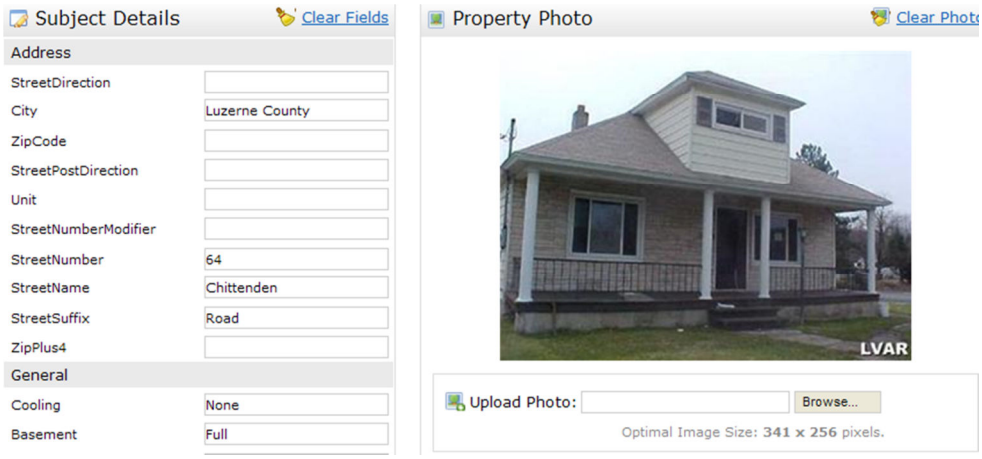
Fill from MLS Number:

If you know that the property was previously listed on Matrix and you have the MLS number for the property you wish to use you can choose to auto fill in your subject property from the MLS Number.

In the Field "Enter a Residential MLS Number to auto-fill from" enter in the MLS number from the listing you wish to use and click on the "Fill button"



Now all fields for your subject property will be auto filled with the information from the chosen listing. At this point you will need to go through all fields and correct each field to make it relevant to the current home. You may also choose to "Clear Photo", "Browse" and "Upload" a new photo for a more up to date look of the home.



Format Your Cover Page

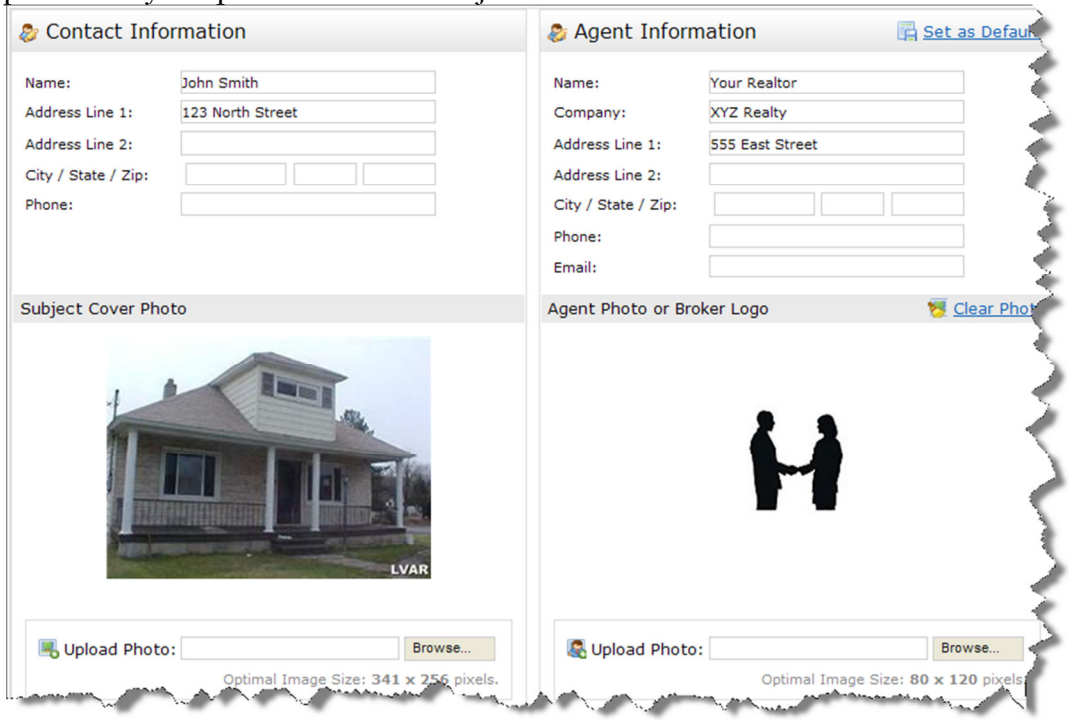
After completing all your Subject property information, click "**Cover**" on the CMA Wizard navigation bar. Note: If "Cover" is greyed out, you have not selected a Cover as one of your CMA Pages. Click "Pages" on the navigation bar to go back and select one.

Contact Information

As long as you selected a Contact for the CMA, the Contact information will automatically fill. If you have not selected a Contact fill in all relevant fields for your Contact.

Alternate Subject Photo for Cover Page under Contact information

If you have uploaded a subject photo, it will automatically appear here. If you have a different subject photo that you want to use just for the Cover sheet, upload it here. Your original subject photo that you uploaded on the "Subject" screen will still be used on the interior CMA pages.



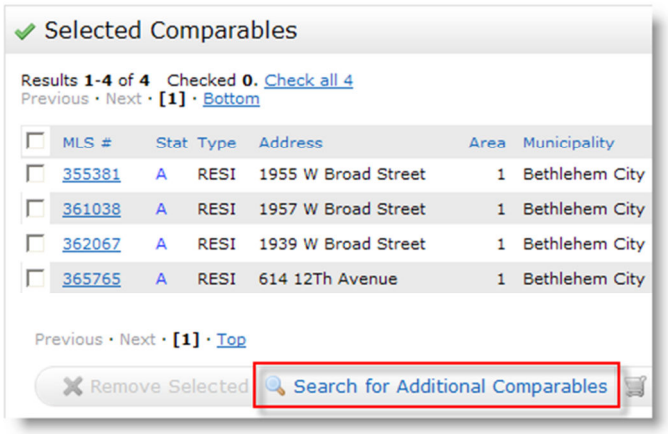
Agent Information
The Agent Information section does **not** auto-fill. This is so that you can set it however you want with variations from your Roster information. The first time you complete a CMA, enter your Agent Information how you want it to appear on all CMAs. Then click the link "Set as Defaults." From that point, your Agent Information will always auto-fill with your default information.

Agent Photo (Optional)
If you would like your photo or Broker Logo included on the Cover Page, upload it here. If you change your mind after uploading the photo, click the "Clear Photo" link.

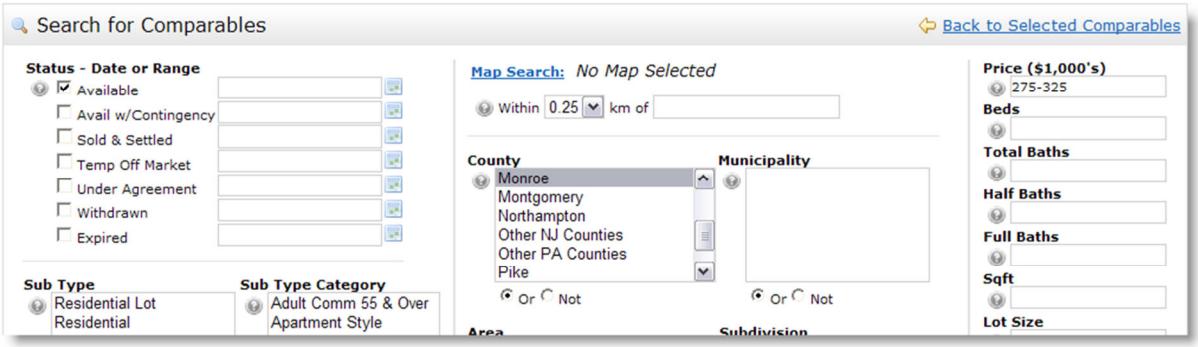
Select/Edit Your Comparables
After completing your Cover Page set-up, click "Comparables" on the CMA Wizard navigation menu.

If you already selected your comparables before starting the CMA, they will be shown here and you will have the option to add more comparables or delete any you no longer want. Otherwise, you can select your comparables here from scratch.
Previously, we only added Active listings to our CMA. We can now choose to add in other status listings such as Solds, Conditionals, Expired, ETC.

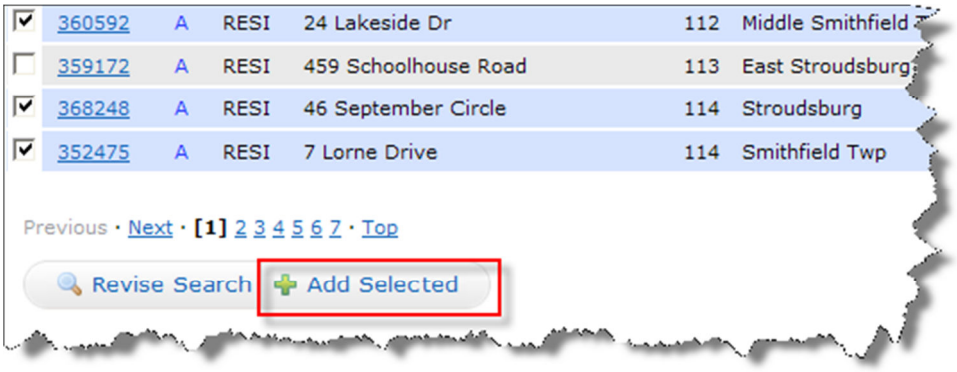
To add in other Status listings click on the "Search for Additional Comparables" button



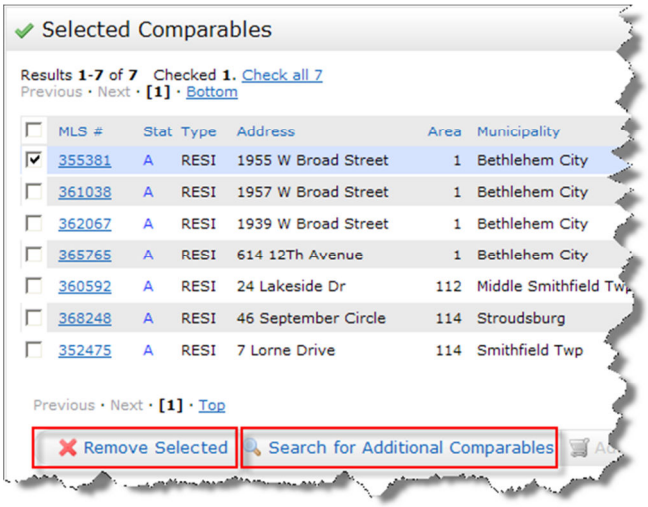
This will bring up a search screen. Enter in all information to get the Comparable listings to use in your CMA. Click Search to retrieve all possible results. **Note**: You can do this as many times as necessary to retrieve all the listings you require.



Once you are on your listing results page, Check off the listing that you wish to use and click on the "Add Selected" button

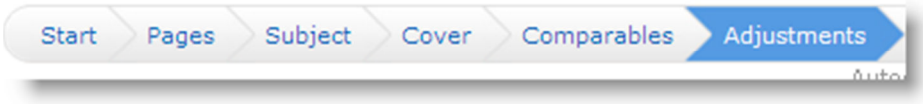


Once you all selected the listings from that search that you wish to use you will be brought back to the "Selected Comparables" page. At this point you can review all comparables that you have chosen to be in your CMA. You may also Remove any listings by Checking off the listing and clicking on the "Remove Selected" button. You may also Add any listings by clicking on the "Search for Additional Comparables" button. If you are satisfied with the listings you have chosen click on "Adjustments" on the CMA Wizard navigation menu. **NOTE:** If the adjustment tab is greyed out it is because you have not selected it as one of your CMA Pages. Click "Pages" on the navigation bar to go back and select it if you wish to add adjustments to your CMA.



Adjust Your Comparables (Optional)

If you choose to make adjustments to your comparables on any field, this is where you do it. After selecting all your comparables, click "Adjustments" on the CMA Wizard navigation bar.



Single Line Mode

When you go to Adjustments, it defaults to Single Line Mode. This allows you to set a value for any feature and have all of the comparables automatically adjusted according to that setting.

For example, let's say you have decided that you want to value Bathrooms at $1,500. In the Feature Value box for Bathrooms, type in 1500 (do **not** add a + or – sign). In this example below, the Subject property (shown in bold at the top), has 2 bathrooms. The adjustments for each comparable all happen automatically when you type the number in the Feature Value. So properties with 2 bathrooms (like our Subject) have no adjustment because they are already comparable. Properties with only one bathroom are adjusted upwards $1,500 to make them comparable with our Subject which has two. In one case, there is a comparable with 4 bathrooms. This is adjusted downward $3,000 because it has 2 bathrooms more than our Subject.

Adjustment Details

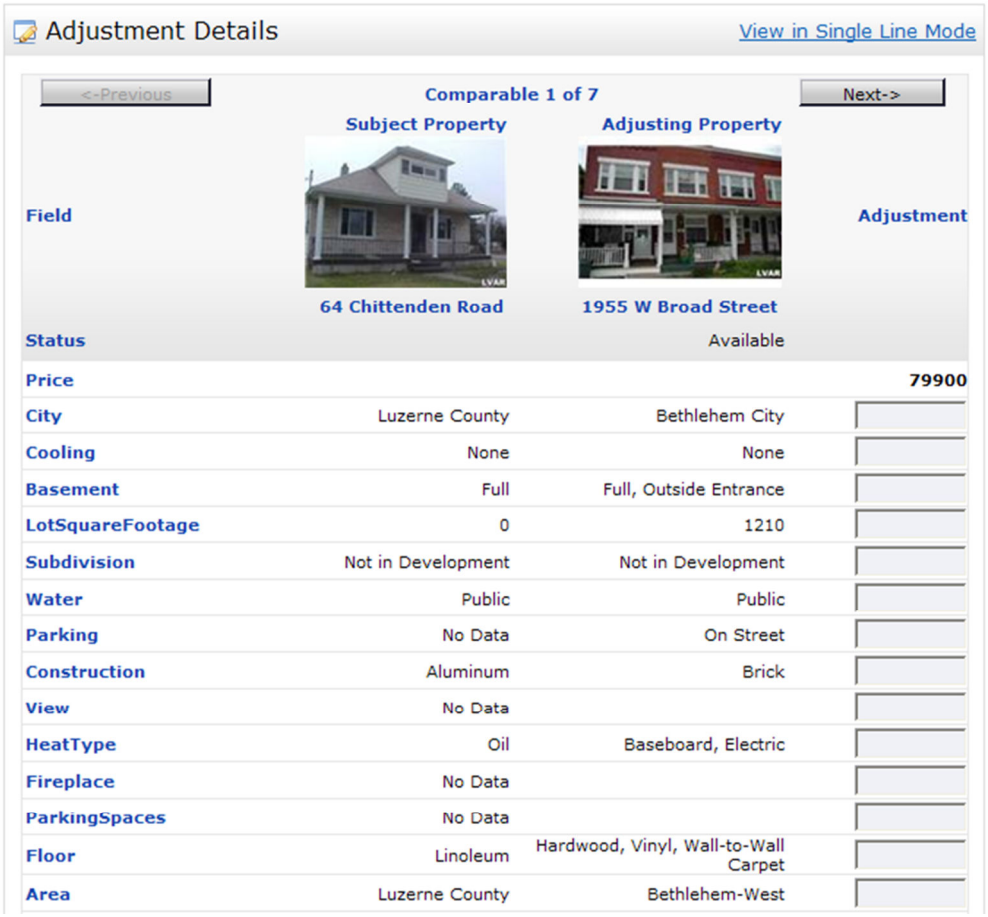
	Status	Price	Adjusted Price	# Baths	
Feature Value					1,500
1234 Main Street SW				2	
711 24th Ave N	Sold	17,500	19,000	1	1,500
3031 Grand Ave S	Sold	29,900	29,900	2	0
2606 2nd Ave S	Sold	89,000	90,500	1	1,500
3255 Pleasant Ave S	Sold	89,900	89,900	2	0
915 W 36th St	Sold	99,900	101,400	1	1,500
415 Queen Ave N	Sold	99,900	99,900	2	0
520 Logan Ave N	Sold	110,000	107,000	4	(3,000)

Continue this down the line for whichever fields you want to make adjustments on. Use your Tab key to move from one field to the next, or use the navigation buttons at the bottom:

Detail Mode

If you prefer to make your adjustments in Detail Mode, click the "View in Detail Mode" link at the top right of the screen.

In Detail Mode you make your adjustments manually for each field for each comparable property, one property at a time.



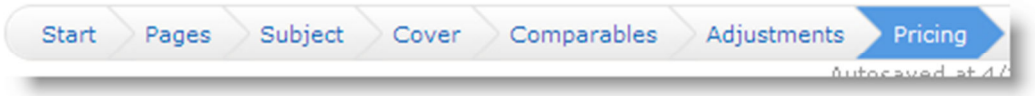
Adjustment Details — View in Single Line Mode

<-Previous | Comparable 1 of 7 | Next->

Field	Subject Property	Adjusting Property	Adjustment
	64 Chittenden Road	1955 W Broad Street	
Status		Available	
Price			79900
City	Luzerne County	Bethlehem City	
Cooling	None	None	
Basement	Full	Full, Outside Entrance	
LotSquareFootage	0	1210	
Subdivision	Not in Development	Not in Development	
Water	Public	Public	
Parking	No Data	On Street	
Construction	Aluminum	Brick	
View	No Data		
HeatType	Oil	Baseboard, Electric	
Fireplace	No Data		
ParkingSpaces	No Data		
Floor	Linoleum	Hardwood, Vinyl, Wall-to-Wall Carpet	
Area	Luzerne County	Bethlehem-West	

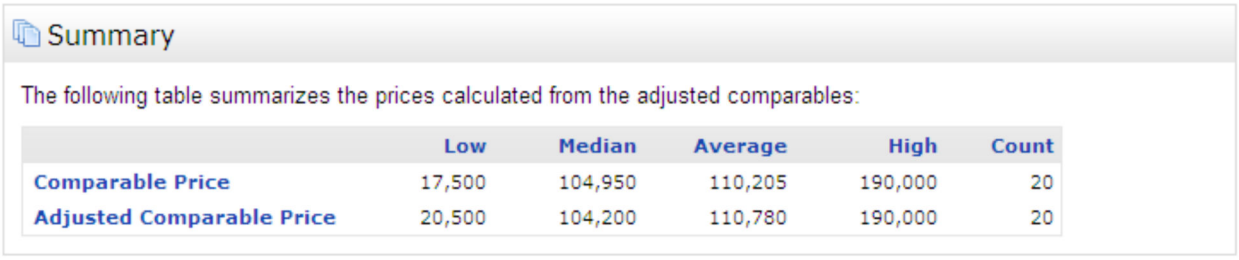
Click the “Next” and “Previous” buttons to move ahead or back among your comparable properties. If you want to switch back to Single Line Mode at any time, click the “View in Single Line Mode” link.

Make Your Pricing Recommendations (Optional)
After completing you’re “Adjustments” Page, click “Pricing” on the CMA Wizard navigation menu.

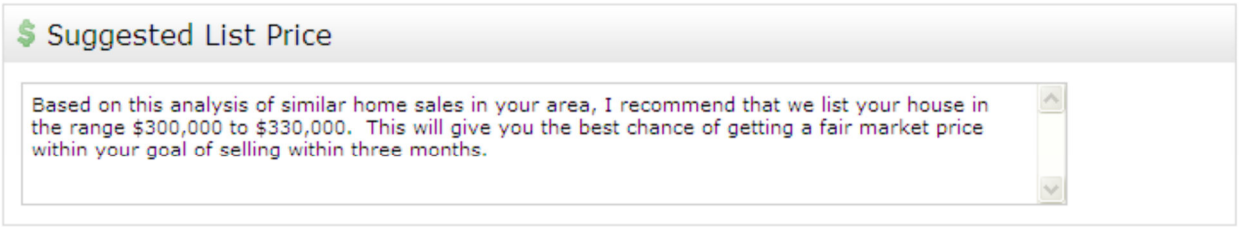


If you want to add Pricing recommendations to your CMA, this is where you do it. **Note:** If the Pricing option is greyed out, it is because you did not select the “Pricing Recommendations” page. Go back to the “Pages” section and select this page, then you can click “Pricing” on the CMA Wizard navigation bar.

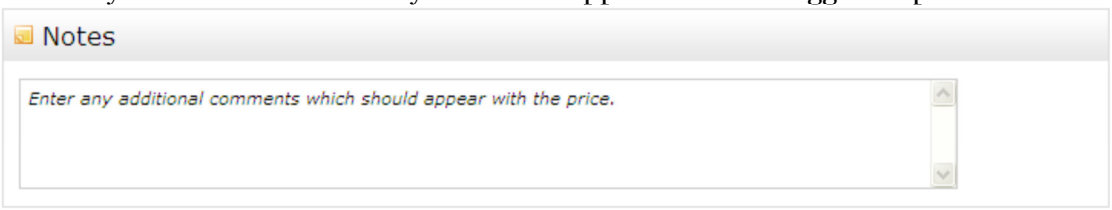
Summary
This informational table will be included in your Pricing Recommendation. It compares your Comparable prices with the adjusted prices (if you made any adjustments).



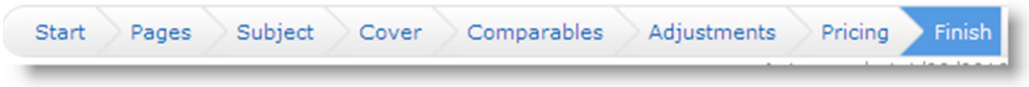
Suggested List Price
Matrix will not make a price recommendation for you. This requires your analysis based on your experience and combining all factors that may or may not be included in the CMA. This is a free-form box that allows you to enter whatever you wish, such as a price or price range, including explanation. Or you may leave this space blank and write the price in by hand when you meet with the client.

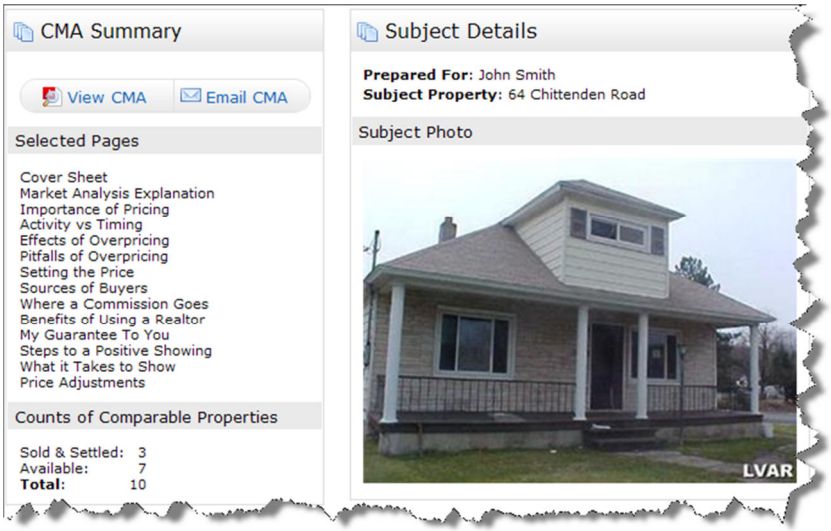


Notes
Enter any additional comments you want to appear with the suggested price.



Finish (View, Print and Email)
When you are ready to view, print and/or email your CMA, click "Finish" on the CMA Wizard navigation bar.





In addition to summaries of selected pages, comparable properties count, client name, subject photo/address, you also have the option to View or Email your CMA. **To run your CMA report and view it** in PDF format, click the "View CMA" button in the upper left corner. Once the CMA is opened in a new window in PDF format, you may **print it by selecting File>>Print from the Adobe PDF menu bar**. **To email a link to the CMA Report to your client**, click the "Email CMA" button, fill out the email form and then click the "Send" link. If you have set up a team in your Matrix settings, you will have the option to print/email the CMA as yourself or on behalf of your team (such as in the example below).

To retrieve a saved CMA at a later date, click the "My Matrix" tab. You can either click "CMAs" to get your full list of Saved CMAs, or click "Contacts" and open the CMAs just for a particular client. When you find the CMA you want, click the button to open the CMA Wizard, view the CMA (run it as a PDF), email the CMA or delete it.

Chapter 15 Map Feature/Driving Directions

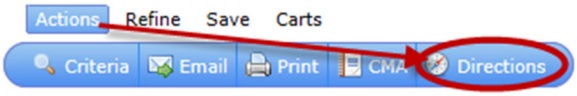
Driving Directions – Map Feature

Matrix now offers a Driving Directions/ Mapping feature. Within this feature you have the ability to view all selected listings on one map for easy viewing, map out directions from one listing to another, and add Starting/Stopping locations. This feature is great for giving your clients easy directions to open houses or listings that they wish to view. Follow the instructions below to begin:

1. Run your listings search. Select the listings you want to submit to the Driving Directions. NOTE: you may also use listings from the Hot Sheet or Open House Hot Sheet (See Chapter 16 "View listing options for") To keep the tour manageable, don't submit more listings that you could reasonably expect to reach in a morning or an afternoon, say 5-8 listings (the maximum in one tour is 25).

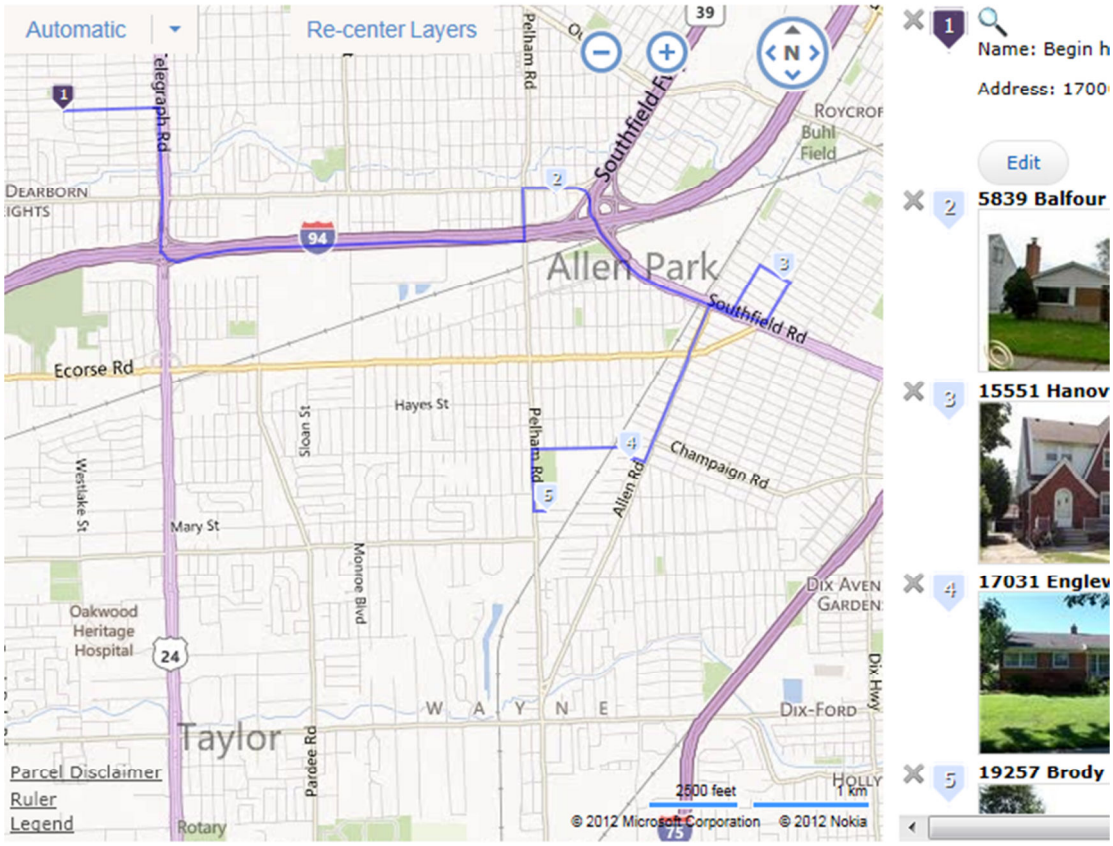
2. Once you are on the listing results page check ☑ off the listings that you wish to use.

3. Click on the

button under the Actions section located at the bottom of the search screen.


Note: if a chosen listing has not been plotted properly in Matrix, you may wish to return to your search and eliminate it from your selections. An improperly plotted listing will of course affect the driving instructions and maps generated by the Driving Tour module (keep this in mind when you enter your own listings).

This will open up a map with all selected listings on one map and produce the best route to get to the selected listings. Below the map you will see turn by turn directions.



Turn-by-Turn Directions

Total distance: 8.4 Miles

Begin here

Start	Depart **Annapolis St** toward **Westlake St** (0.5 Miles)
1	Turn **right** onto **US-24 S / S Telegraph Rd** (0.8 Miles)
2	Take ramp **left** for **I-94 E** (1.5 Miles)

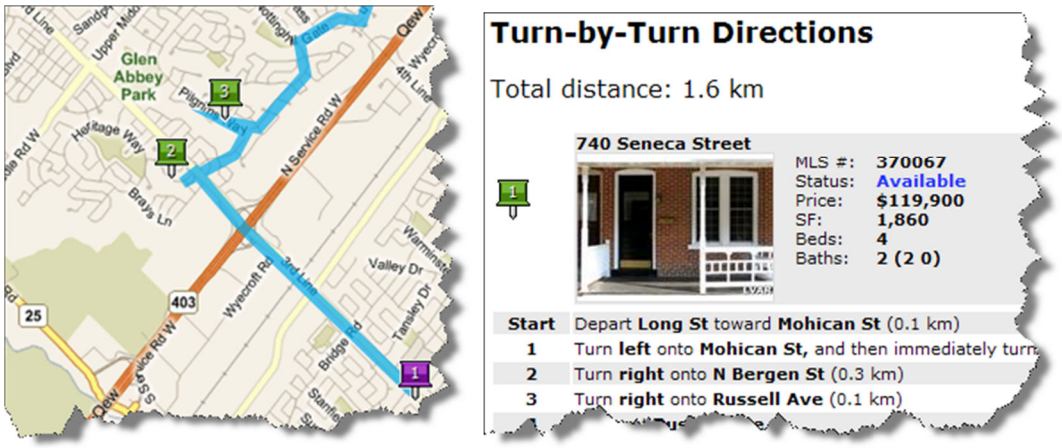
4. If you would like to change the order of the pins, hover over the address of the property to the right hand side. Once the listing is highlighted in blue click on the up or down arrows to change the order of the pin. You may also choose to **Drag and Drop** to move the listings: In the listings table, simply drag each listing into its desired position in your tour. Do this by left-clicking and holding a listing in the table, moving it up or down the list as required, then letting go of the mouse button at the appropriate spot. Your listing will take over the position you dropped it on and all listings will be automatically repositioned and renumbered as required in both the listings table and on the Overview Map. Note: don't try to drag a listing by grabbing a listing's photo - grab it in some other portion of its cell. Once you have the listings in the order you would like to view them click on the "Get Directions" button again.

5. By clicking on the "Get Directions" button, Matrix will produce the map again along with the best route to get to the selected listings in the order you have chosen. Below the map Matrix will also generate new turn by turn directions.

6. You may remove any listings you wish by hovering over a listing in the listings table and click its red X. This removes it from the Driving Directions entirely - from both the listings table and the Overview Map. However it still remains in your Matrix search results.

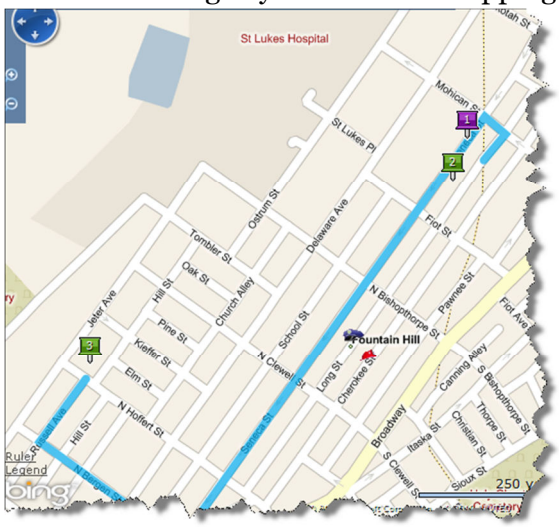
7. At this point you may also add a "Starting Location" and a "Stopping Location". To add a "Starting Location" click on the "Add Start" button located at the bottom right hand side of the screen. You can now enter in the Name and Address of Starting Location. Click on the "Find Location" button.

8. Matrix will again, produce the map with your "Starting Location" pin in purple along with the best route to get to the selected listings in the order you have chosen starting at your custom "Starting Location". Below the map Matrix will also generate new turn by turn directions starting at your custom "Starting Location".

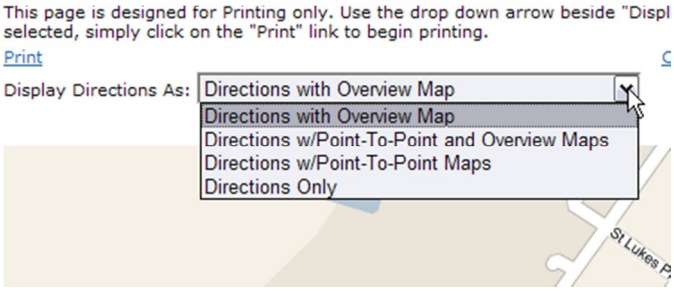


9. To add a "Stopping Location" click on the "Add Stop" button located at the bottom right hand side of the screen. You can now enter in the Name and Address of your Stopping Location. Click on the "Find Location" button.

10. Matrix will again, produce the map with your "Stopping Location" pin in purple along with the best route to get to the selected listings in the order you have chosen stopping at your custom "Stopping Location". Below the map Matrix will also generate new turn by turn directions ending at your custom "Stopping Location".



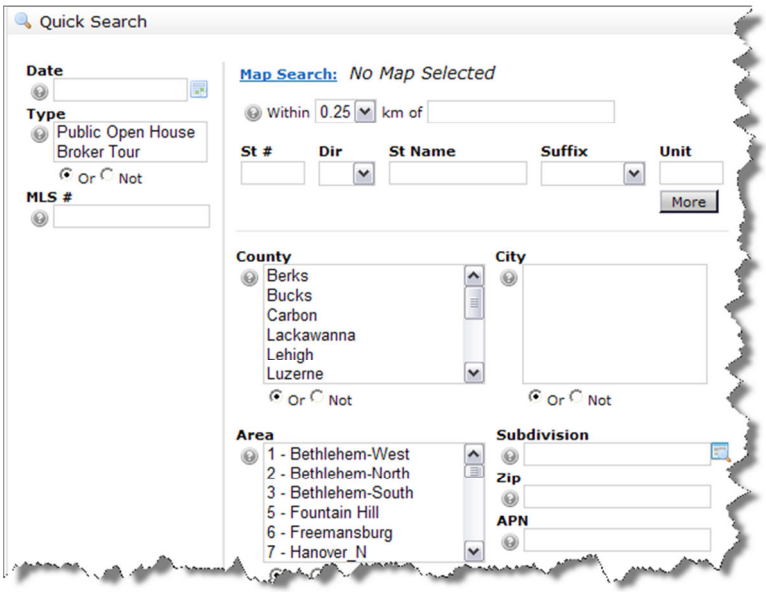
11. You can now choose to either "Email" or "Print" your directions by clicking on the "Email" or "Print" button located underneath the Map.
    a. When Printing the map directions, you also have the choice of selecting which view mode.



Chapter 16: Open Houses

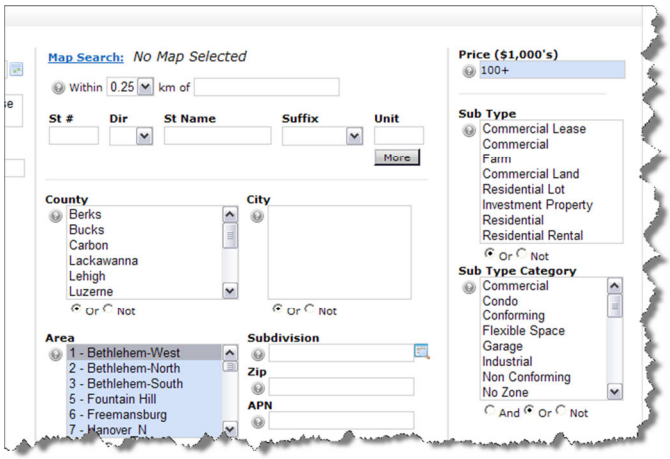
Searching for Open Houses using the Search Tab > Open Houses

1. Click on the Search tab, and then select the Quick link under 'Open House' to search for Open Houses via Lehigh. The search page is similar to an address search under regular property types.



2. You can search Open Houses by County (& City), Area, Price, Type, address, or Date by clicking on the corresponding fields.

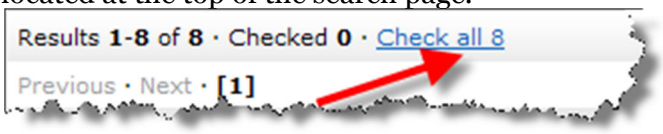
3. Example: If you were looking for open houses within the Smith Gardens - West area that are greater than $100,000, highlight 'Smith Gardens - West' under Area and type '100+' under the Price field. Then click the Results button.



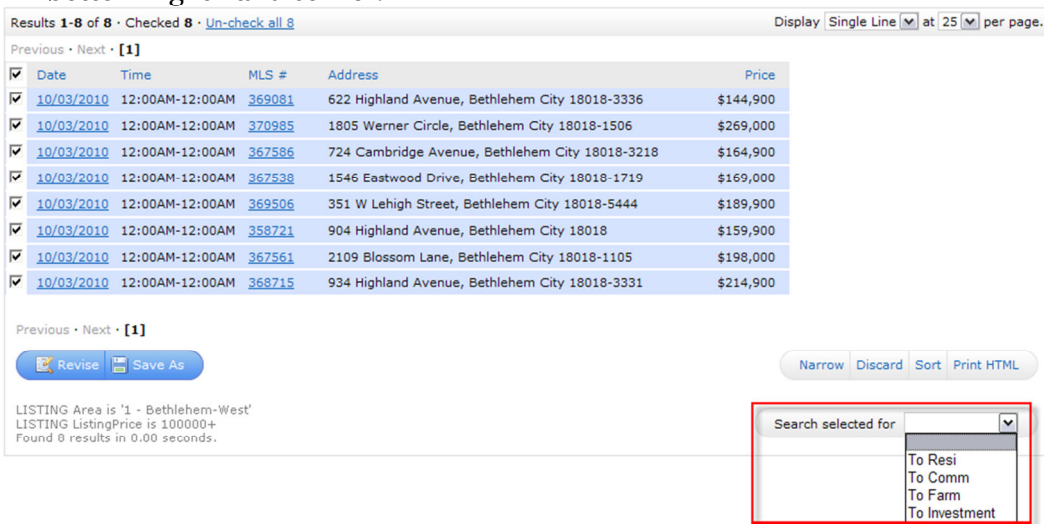
4. Once you have your results you can either print a report by clicking on the "Report" button or choose to save this search by clicking on the "Save As" button.

5. You may notice that you do not have all of the same abilities that you would if you had done a "Residential, General" search. Things such as the CMA, Map, Email, etc.

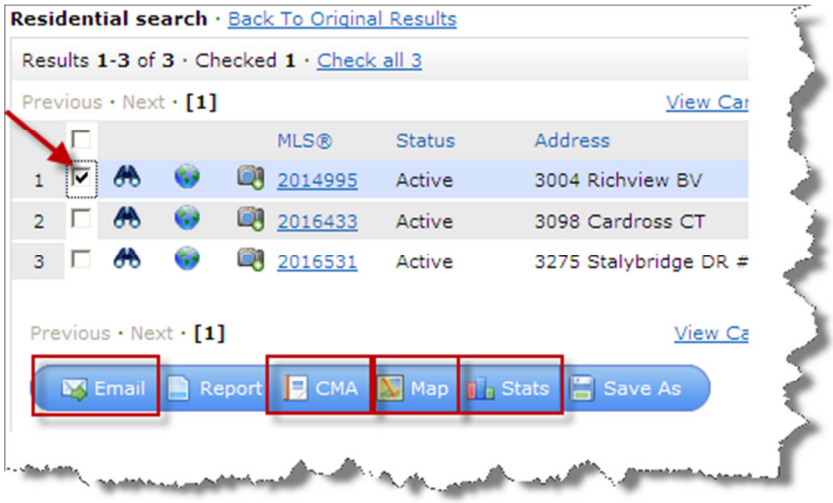
6. If you wish to do any of the above mentioned features simply click on the "Check All" link located at the top of the search page.



7. Next Select "Residential" from the "Search selected for" drop down list located in the bottom right hand corner.



8. This will convert all listings from a "Hot Sheet" like display to a standard "Search" display, giving you the ability to use the previous listings with the CMA, Map, Email and stats features.



Chapter 17: Hot Sheets

The Matrix Hot Sheets are a powerful and flexible way to get an overview of today's significant listing events. Examples: New listings, Back on Markets, Cancellations, etc.

To access the Hot Sheets click the Property Type link on the Home Page Hot Sheets widget as shown below:

Hot Sheet

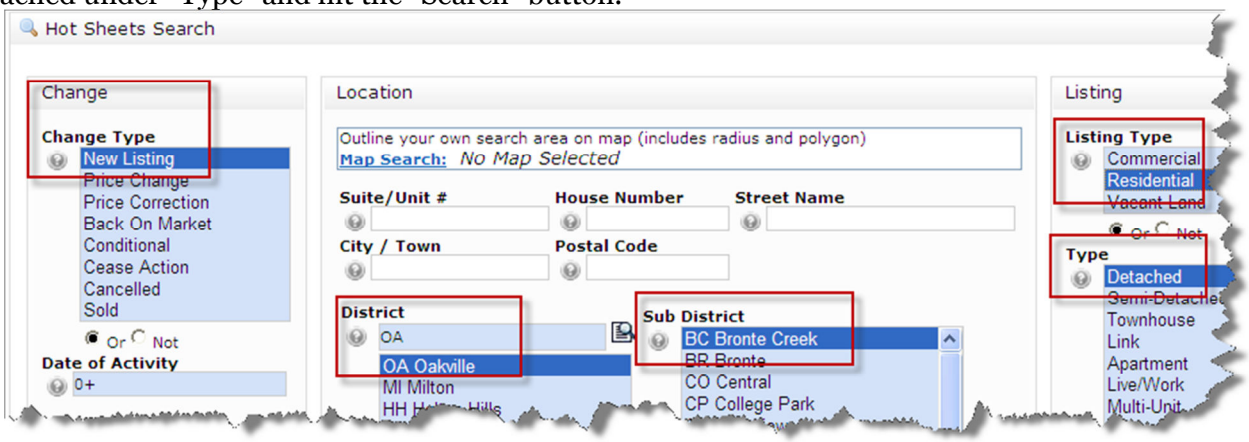
On the home page of Matrix click on the "Hot Sheet" link under the "Hot Sheet" section to retrieve the current Hot Sheet.

You may also choose to click on the "Customize" link to customize the Hot Sheet by specifying your choice(s) of Change Type, Area, City, County, Subdivision, Price, etc.

Customizing your Hot Sheet

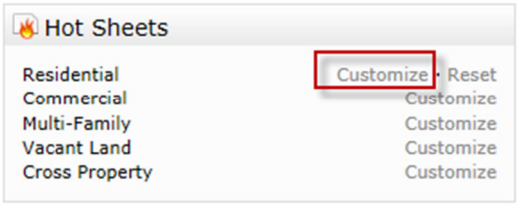
1. You can customize your Hot Sheet to view listings by Status (Change Type), District, Sub District, Price, etc, by clicking on the corresponding fields the same way you would define a Search.

Example: If you are looking for only New Listings that are Detached, Residential within the Oakville, Bronte Creek area, highlight New Listings under the "Change Type" field, Oakville under "District", Bronte Creek under "Sub District", Residential under "Listing Type", Detached under "Type" and hit the "Search" button.

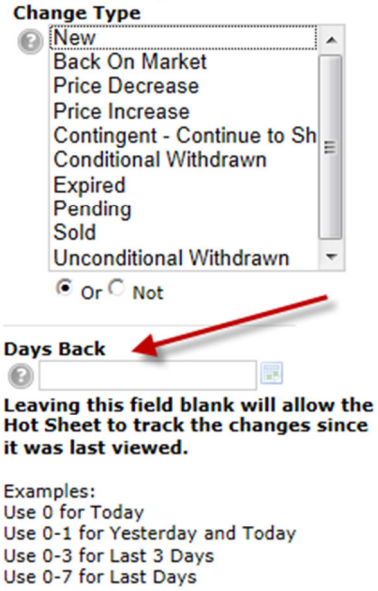


2. By hitting the "Save" button Matrix will auto save this criteria as your "Customized Hot Sheet". Meaning each time you log into Matrix you can click on the link "Customized Hot Sheet" on the Home Page of Matrix to retrieve the listings based on this criteria. At any

point you can choose to reset your Hot Sheet back to the general Hot Sheet by clicking on the "Reset" link. **NOTE**: You may only have one Customized Hot Sheet at a time for any given Property Type. When customization is in place, you will see it as follows:



3. Once you have your results you can treat the results the same as any other Search result.
4. Note the Days Back feature:



What this means is that if you leave Days Back blank, you will see each hotsheet listing only once per session. After you log out, all hotsheet entries will be cleared and on your next login, you will get only new entries that have been added since your last viewing.

If on the other hand, you want to always see the last 2 days of activity, enter 2 in Days Back and this "disappearing act" will not happen. In this case you will always have the previous 2 days of activity, even on subsequent logins.

Chapter 18: Anti-SPAM Features

Recipients of Matrix emails often report it as SPAM (abuse of electronic messaging systems to send unsolicited bulk messages indiscriminately) to their Internet Service Provider (ISP). It is particularly a problem with some large ISPs such as Yahoo and AOL. If enough Matrix emails get reported as SPAM, MATRIX users are blacklisted from sending any emails to anyone at that ISP through Matrix, resulting in time and effort by CoreLogic and Association staff to get back on the "whitelist." In an effort to reduce the extent of this problem, CoreLogic is taking the following actions.

A Note Regarding the Contact's Email Address

Email addresses are verified to ensure that emails are wanted before they are sent through the Matrix system. This is done through a feedback loop process that checks to see if the email recipient has marked Matrix email as spam or if the email recipient has selected any of the unsubscribe options. This process helps prevent Matrix customers from being blacklisted by Internet Service Providers (ISP) and improves our email deliverability.

Receiving the initial Opt-in auto email

By the Contact opening the link to the listings in the initial auto email, the Contact will be opted in to receiving future updates for that auto email. If the email recipient never opens the first auto email they will not receive subsequent auto emails. The opt-in message will give a general greeting and instructions on how to use the Portal. Subsequent auto email will use the sending Agent's Subject and Body from the Auto Email.

Example:

The email you received was sent by John Smith, a Real Estate Professional who is associated with MLS, the Multiple Listing Service (MLS). John has set up an automated search on your behalf. This search will automatically send you updates as it finds listings that match your search criteria. To begin receiving new listings that meet your needs, simply click on the **link below to begin the automated searches**. Please note, the system will automatically stop sending you listings if you do not open the email at least once every 30 days. You will have the ability to stop the process at any time simply by clicking the "Unsubscribe" link below and choosing the "Disable the Automated Search" option.

If you do not want to receive automated listing updates, please do not click the link below.

Click here to view property listings
http://matrixtest .com/matrix/public/displayautoemail.aspx?ID=48675101-708665633-98

Acme Realty Specialists
John Smith, Realtor
1234 Main Street, NW

Equal Housing Opportunity
Office: 612-555-9832
Cell: 612-555-0880

Note: Some Internet Service Providers, like AOL, do not support hyperlinks in email.
If clicking on the above link(s) does not work, simply copy and paste the exact URL into your Web browser. Also, the link(s) above expire in 30 days.

If you wish to unsubscribe to future emails of this nature, please click on the link below:
http://matrixtest .com/matrix/public/unsubscribeautoemail.aspx?ID=0-708665633-44&Eml=ZGlhbmVpdmVzQG1yaXMuY29t

Typical Welcome Message

Welcome to "The Portal"

Welcome to The Portal, your single access point for MLS® listing information, brought to you by your REALTOR®.

When you arrive at The Portal, you may find it convenient to save its web site address as a favourite or bookmark in your web browser. This will enable you to easily visit The Portal at any time.

Listing Information Provided By Your REALTOR®

Your REALTOR® may email listing information to you in two ways: manually or automatically. Both types of email contain a hyperlink which you can click to visit The Portal and view the listing information your REALTOR® has prepared for you.

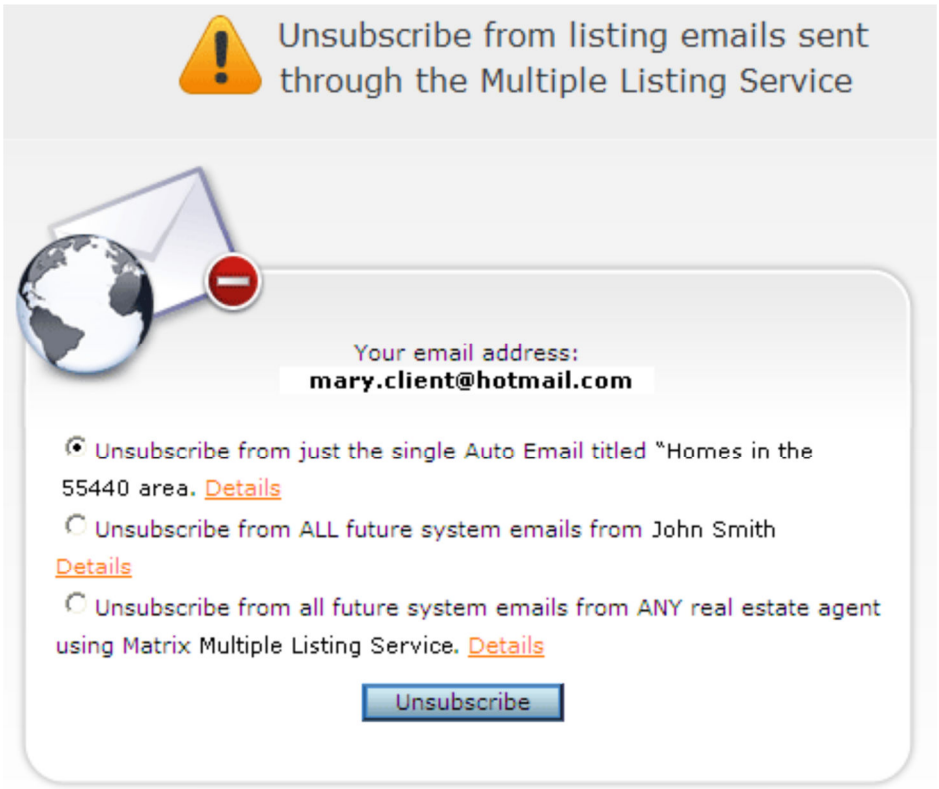
- **Manual ("Direct") Emails:** Your REALTOR® may personally compile and send MLS® listing information for you. These emails contain a link to The Portal where these listings are available for you to view. This collection of listings will remain available for you to view on The Portal for 30 days.

- **Auto Emails:** Your REALTOR® may also arrange for you to receive auto emails. These are also personally controlled by your REALTOR® but dispatched by the MLS® system itself, based on the criteria your REALTOR® has supplied and the mailing frequency he or she has specified. Auto emails also contain a link to The Portal where matching listings are available for you to view. Auto emails will continue to be sent to you until you ask your REALTOR® to stop them or until you unsubscribe from the service yourself by following the unsubscribe link (located at the bottom of the auto email).

On the Start tab, you'll see links to any Direct Emails and/or Auto Emails your REALTOR® has prepared for you. Click on one of those links to view the associated listings.

Some Matrix customers provide additional help for Contacts using the Portal.

Unsubscribe
All emails sent through Matrix have an unsubscribe link that leads to a page allowing recipients the ability to unsubscribe from receiving Matrix emails. Auto Emails have all the options below. Manual Emails have the second and third options



Unsubscribe from a specific real estate professional. This is used when the recipient believes they are receiving unrequested email from a specific real estate professional. This automatically happens when your email was marked as Spam by the recipient. If the Contact unsubscribes or marks an email as spam, this will block only the specific real estate professional from sending additional email to that recipient.

Unsubscribe from the entire MLS.
This is used when the recipient believes they are receiving unrequested email and are not interested in receiving future real estate related email through the multiple listing systems (MLS) from any real estate professional. This will block all real estate professionals from sending additional email through Matrix to that email address.

Unsubscribe from a specific Auto-Email. Auto Email will have a third option; Disable a specific auto email. This is used when the recipient no longer wishes to receive updates or wants to adjust the search criteria for a specific auto email. The agent can re-enable this auto email at their discretion. (This option is not visible in the above screen shot and will only appear on Automatic Email).

Agent unsubscribing from themselves or marking themselves as spam
Agents cannot unsubscribe from themselves or even mark their own email as Spam by mistake. The system will prevent you from doing this.

Agent notification
In all cases, if your email was unsubscribed to, marked as spam or even disabled, the agent will be sent an email notification from Matrix letting them know what happened and what to do to assist their client if they unsubscribed by mistake.

This is not Junk/Spam
In cases where a recipient has marked an email as spam through their email provider (such as AOL, MSN or Hotmail), simply re-subscribing might not be enough. Their email provider may need to be notified that they want to receive emails through the MLS. The links below provide specific email help regarding what to do.

ISP Specific Help
AOL (AOL Browser/Mail Toolbar):
http://help.aol.com/help/microsites/microsite.do?cmd=displayKCPopup&docType=kc&externalId=219050
AOL Webmail:
http://help.aol.com/help/microsites/microsite.do?cmd=displayKCPopup&docType=kc&externalId=220979
MSN/Hotmail/Live:
http://help.live.com/Help.aspx?market=en-US&project=MailClassic&querytype=topic&query=WL_Mail_PROC_BlockEmail.htm
Yahoo Classic: http://help.yahoo.com/l/us/yahoo/mail/classic/abuse/
Yahoo New: http://help.yahoo.com/l/us/yahoo/mail/yahoomail/abuse/

Re-Subscribe (opt in)
To re-subscribe and allow Matrix emails to be delivered again a recipient simply needs to send an email to the optin email address from exactly the email address they unsubscribed from. Re-subscribing will remove all blocks assigned to that recipient and allow the recipient to receive email through Matrix again. This email can be blank, no subject or body text required.

Glossary of Terms Regarding SPAM
US CAN-SPAM Act - A law adopted on January 1st, 2004, that establishes requirements for those who send email with primary purpose of advertising or promoting a commercial product or service.
Blacklist - Blacklists are lists of known spammers, which contain their IP addresses, and/or their ISP (Internet Service Provider). Such information helps spam-filters block all messages coming from known spammers and/or their ISPs.
False Positives - Email that is labelled as spam by a spam filter of the recipient, while not being spam.

Feedback loop (Spam complaint) - The process by which the email client (ISP) of the receiver forwards complaints of emails marked as spam by recipients for removal by the sender.
Opt-in - The action of agreeing to receive emails from a particular company, group of companies or associated companies, confirmed by subscribing to an email list.
Opt-out - A mailing list which transmits emails to people who have not subscribed and lets them opt-out from the list. Sometimes it is used to confirm that such emailing address is valid for further spamming it.