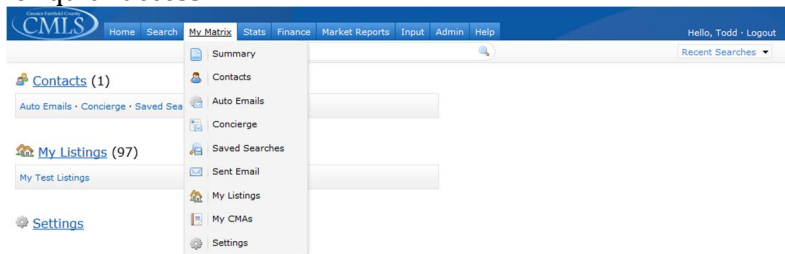## The My Matrix Tab

The Home tab allows you to manage your listings, contacts, settings and work with your saved/automatic searches and CMA's. This is also where you will keep track of watched listings and email history.

Summary – This page is the main page of the My Matrix Tab. It consists of the main categories of the tab for quick access.

Contacts – This page allows the user to manage their contacts. They can add/ remove,edit, set active/inactive, and quickly view their clients activity in the client portal.

This area shows what kinds of active searches are set up for the client.

This area shows the number of active Auto Emails, active Saved Searches, and the last time you performed a function for the specific client.

Last Portal Visit – This shows the last time that the client accessed and viewed the portal.

Sorting Capability – This shows the activity within the portal. Clients have the ability to sort their listings into Favorites, Possibilities, and Discarded.

Open Portal – This is the users access to the clients portal. The User will view the Portal as the client will view it. The User is viewing in "BCC", andwill not be able to sort the listings as the client would.
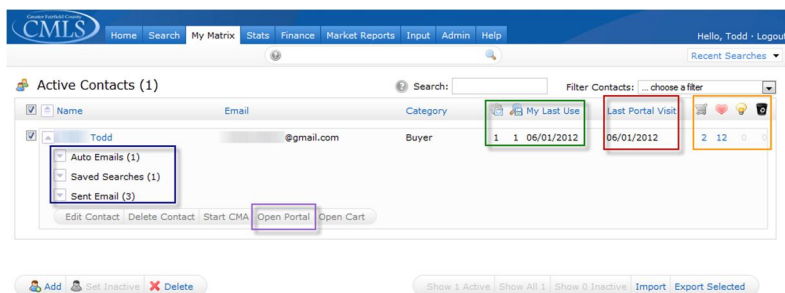
Clicking on one of either Auto Email, Saved Searches, or Sent Email, will open a drop down that shows the status and subject of the selection.
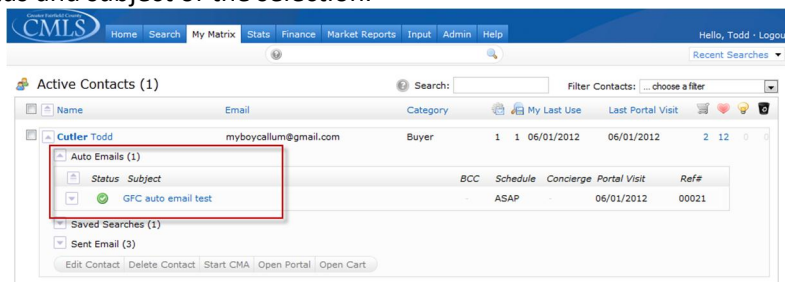
Clicking on the subject line of the selection will open up another drop down which will give you options for managing the email, and has a review of the criteria setup.
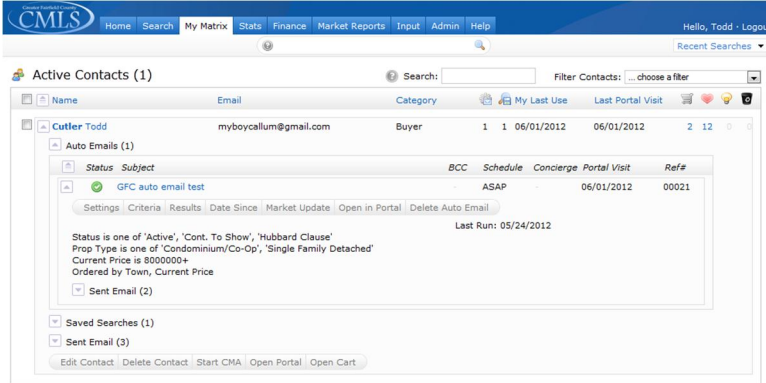
Settings allows the user to view and amend how the email is setup to send.
Criteria allows the user to review and amend the criteria setup for the email.
Results allows the user to see what listings have been sent to the client, the date sent, and the sorted status of specific listings.
Date Since shows the number of new or updated listings since the search was last run.

Market Update allows the user to optionally choose an update type and/or update date range in combination with the criteria of the original search.
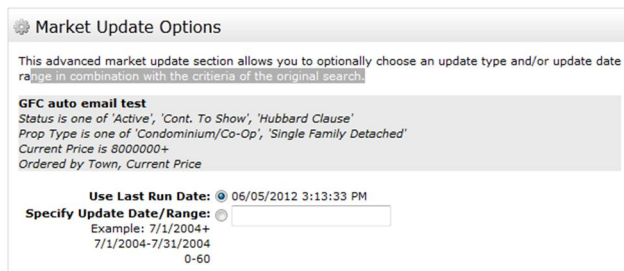
Open in Portal allows the user to open up the specific email in the the Clients Portal.
Delete Auto Email removes the email forever. The client will not receive anymore emails from the client concerning this search.

Sent Email – Clicking on sent email, will open up a drop down, revealing all the emails sent from Matrix for the client. It will show the number of listings sent and whether they were viewed or not.

Auto Email – This is a direct link to all the Auto Email the user has set up for clients. By default, the emails aresorted by contact name, but can be resorted for user preference. Clicking the "Subject Line" of the Auto Email, produces a drop down with buttons for managing the auto email. These buttons have the same functions as the ones previously outlined for contacts.

Concierge – This is a direct link the all the Auto Emails that are set up with the concierge function. Concierge is a setting that allows the user to review and sort listings for the clients before they are auto emailed. The user can choose which listings to send, and which to discard.

Saved Searches – This is a direct link to all the Saved Searches the user has set up for clients. By default, the emails are sorted by contact name, but can be resorted for user preference. Clicking the "Subject Line" of the Saved Search, produces a drop down with buttons for managing the Search. These buttons have the same functions as the ones previously outlined for Auto Email and Contacts.

Sent Email – This is a direct link to all the Sent Email the user has sent to clients. By default, the emails are sorted by date sent, but can be resorted for user preference. At a quick glance, the user can see how many listings were sent, and if the email was viewed by the client.

*Note - The "Viewed" function only works if the email sent was for a "contact" within Matrix and Viewed through the client portal.

My Listings – This is a direct link to all the the listings the user has within Matrix. From here, the user has access to view all 14 categories of sorted listings.

CMAs – This is a direct link to all the theCMAs the user has generated for their clients. The user can see the property type of the report, as well as the time created and a modification date if applicable. Clicking on the Description of the CMA will produce a drop down with buttons for managing the report (View, Edit, Email, Delete).

Settings – Settings is where the user goes to Customize their user experience. From here, they can add an email signature, create standard or custom Headers and Footers, Speed Bar Shortcuts, Set up Teams, createCustom Display and Export templates.