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Matrix 7.0 is bringing several upgrades that address customer requests, and will provide enhanced experiences for both agents and their clients. The client portal has been completely re-designed, to include a fresh modern look, displays that adjust to different screen sizes, and notifications to agents when their clients use the portal. Additionally, new headers have been created, improvements made to IDX displays, and all mapping functionality has been upgraded to Google maps.

Contents

Updated Client Portal

The Matrix Client Portal has a new look and feel!

Key changes include:

Four new "Fluid" displays which fit content to the consumer's screen, no matter what size it may be.
This means a consumer on a phone will see the same content as they would on a large-screen computer.

- Map View
- List View
- Gallery View
- Full Property View (Accessed by either clicking the three dots highlighted in the image, or by simply clicking the address of the property)
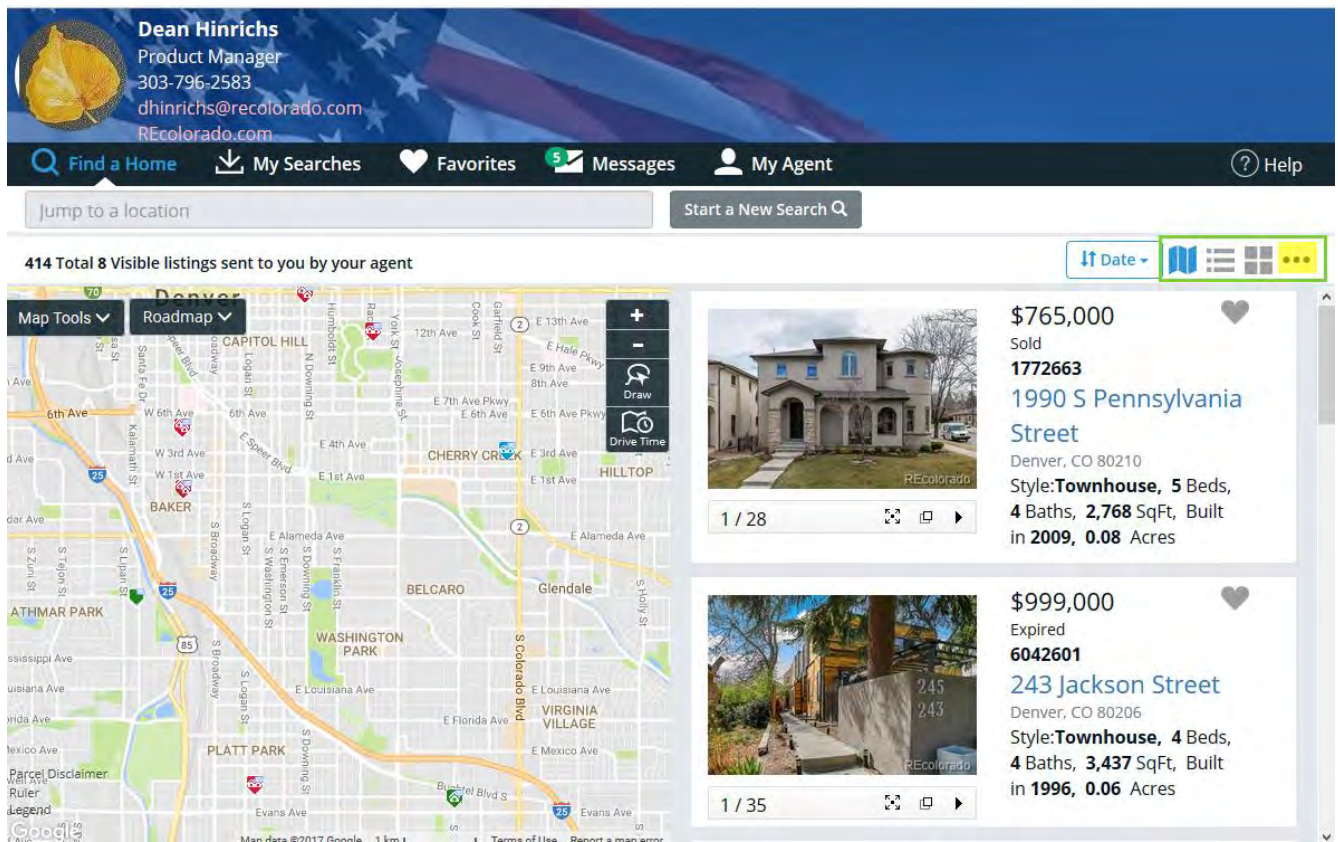
Graphiq Data Visualizations on the Full Property view – interactive infographics about the property and its neighborhood such as sales and transaction history, school data, demographics, market trends, local highlights and so much more.
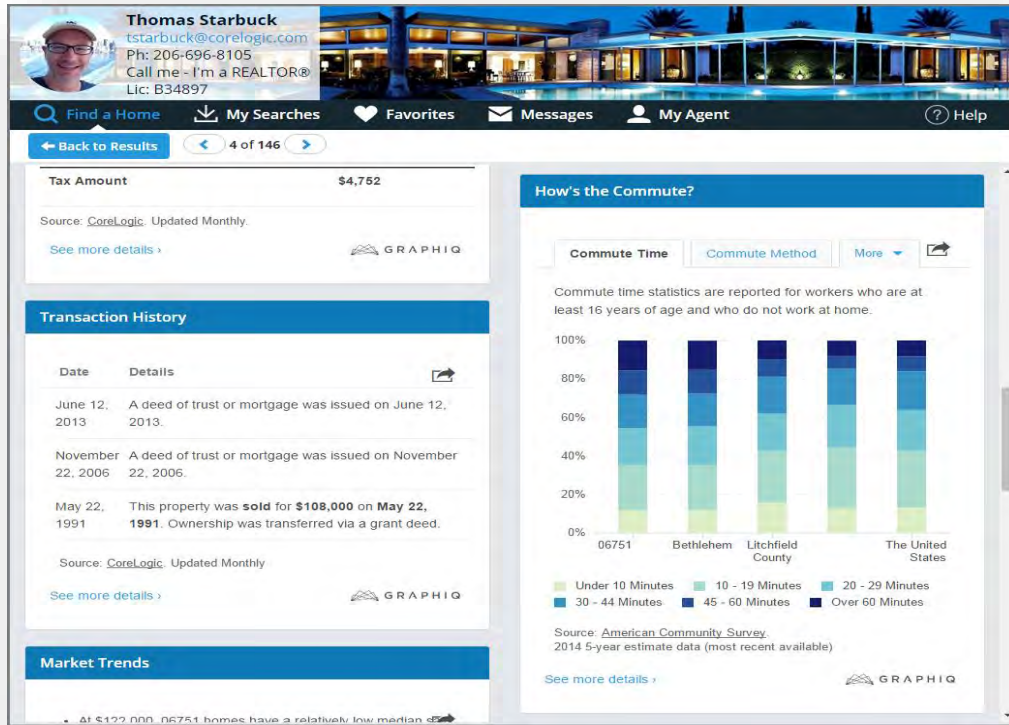
- Some visualizations have multiple tabs, providing detailed information to the consumer

Specific infographics we will display include:

- **Recent Sales and Tax Details** - A summary of the two most recent sales, and the most recent property tax information available.
- **Natural Disaster Risk** - Displays levels of risk for 7 different natural disaster types by property - fire, hail, flood, tornado, sinkhole, storm surge, and earthquake.
- **Real Estate Market Trends Overview** - A summary overview of region-wide real estate market trends, including charts for Home Price Index and Median Sale Prices
- **Nearby Public and Private Schools** - A list of nearby public and private schools, including information about their location, rating, and size.
- **Age Distribution** - The distribution of resident ages in the region, according to the most recent Census estimates.
- **Ethnicity Distribution** - The ethnic distribution of residents in the region, according to the most recent Census estimates.
- **Educational Attainment** - Statistics showing the most common educational attainment found in a region, based on the most recent Census estimates.
- **Languages Spoken** - A distribution showing the most commonly spoken languages or language types in the region.
- **Marital Status Statistics** - Statistics showing the most common marital status in a region, based on the most recent Census estimates.
- **Population Over Time** - A historical chart showing population changes dating back to the earliest census available for that region.
- **Homeownership Statistics** - A breakdown of occupied homes in a region, showing the proportion of homes that are rented as opposed to occupied by the homeowner.
- **Homeowner Costs** - A breakdown of total expected homeowner costs per month in the region.
- **Household Income** - Statistics showing the average household income in a region, based on the most recent Census estimates.
- **Fuel Type Usage** - According to the most recent Census, the breakdown of energy types used by residents in the region.
- **Length of Commute** - A breakdown of the average time a resident in the region commutes on the way to work.
- **Method of Commute** - A breakdown of the methods utilized by residents of a region to transport themselves to work.
- **Average Work Departure Time** - Shows the most common time that residents in this region leave their dwellings to transport themselves to work.
- **Available Vehicles** - Shows the number of available vehicles for each household in a certain geographic region.

Geographic fields like County, City and School District are now included on the Portal's search form.
- The user's current map location will not be applied as part of search criteria when any of these fields are used. If the user's search does not contain any geographic fields then the boundaries of their currently-visible map, or map shape, are applied as limiting search criteria.
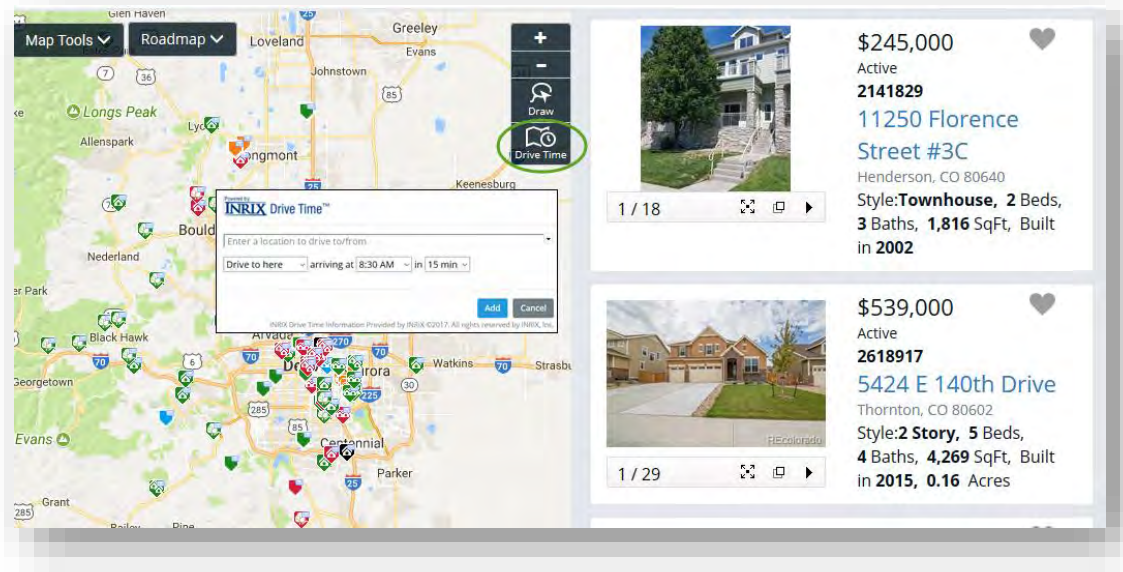

Pin clustering now displays on the map, when the number of results is between 500 and 5000, just as in Matrix proper, showing how many matching listings are in various regions.
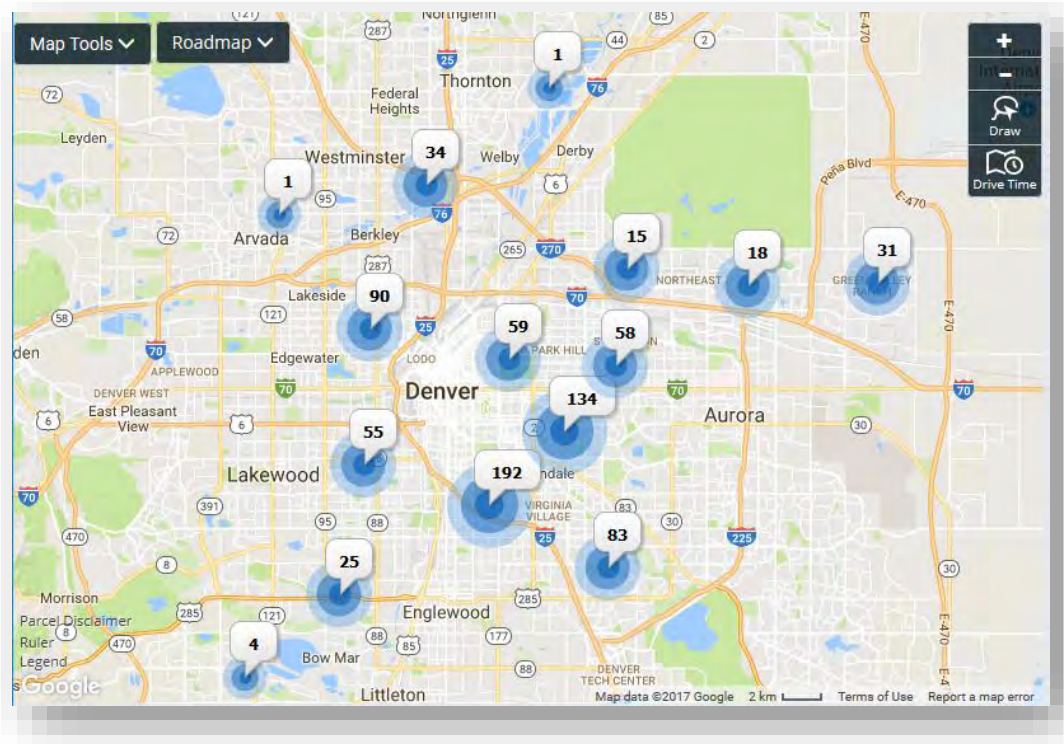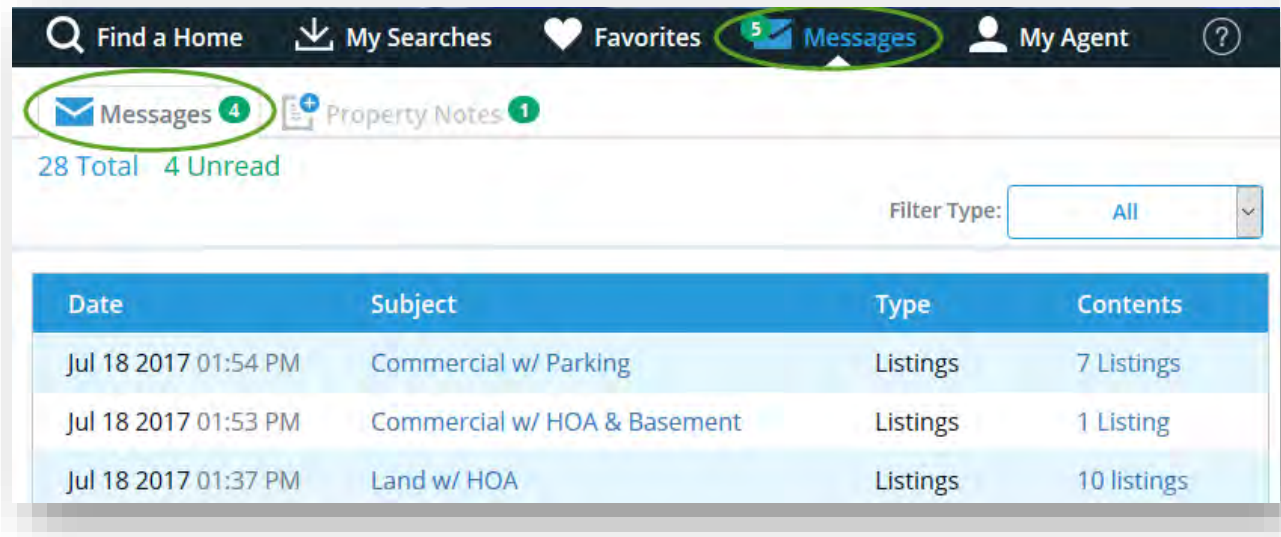
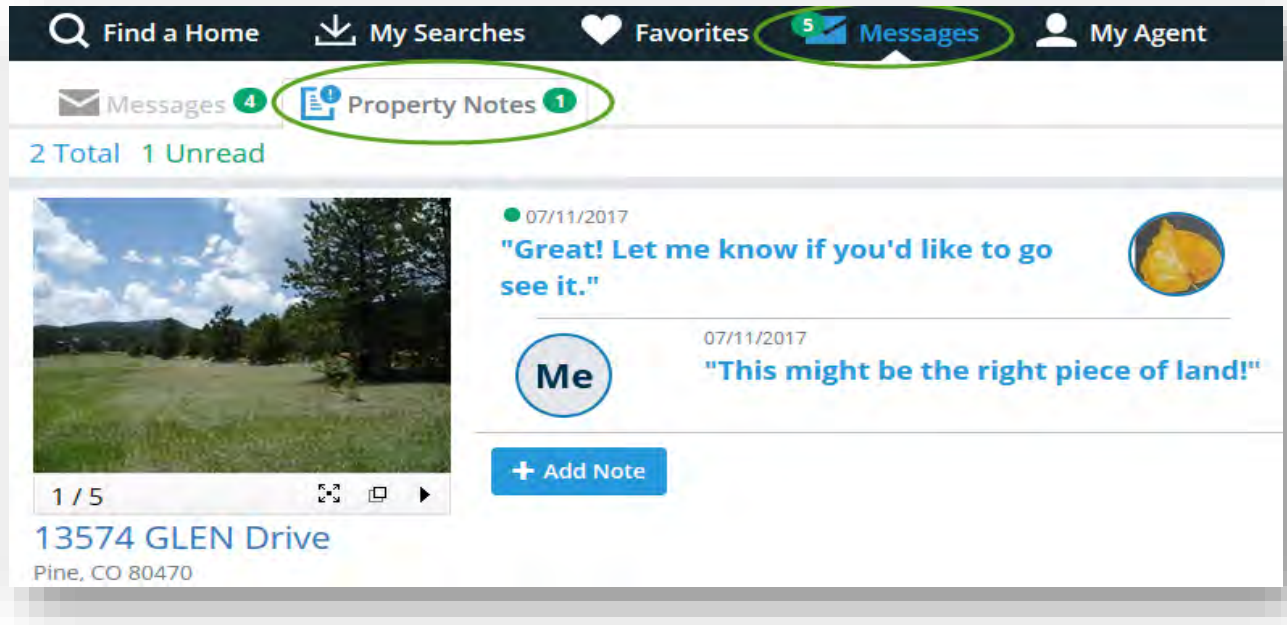**INRIX DriveTime™** searching is now available on the map

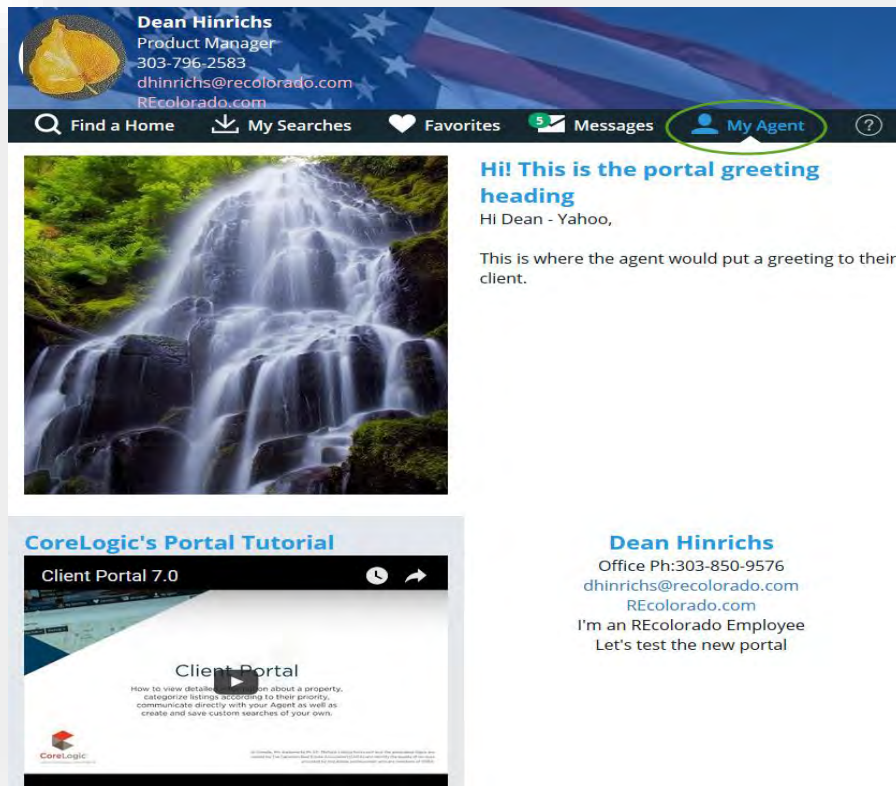**Separate pages within the Portal** provide access to:
- A history of all content emailed to the client, including the ability to view just the new and changed listings for each auto email update.

- All notes added to listings by the contact or the agent.

- An agent-customizable profile page, which can include text, photo, video, current listings, and contact information

Agent's Portal Profile Page

Agents control the content displayed on their Portal Profile page by going to My Matrix → My Information and clicking on the Portal Profile tab.

- *Note:* All information previously populated in the agent's current 'Information' tab will auto populate into the new profile. The agent can change those items at any time.
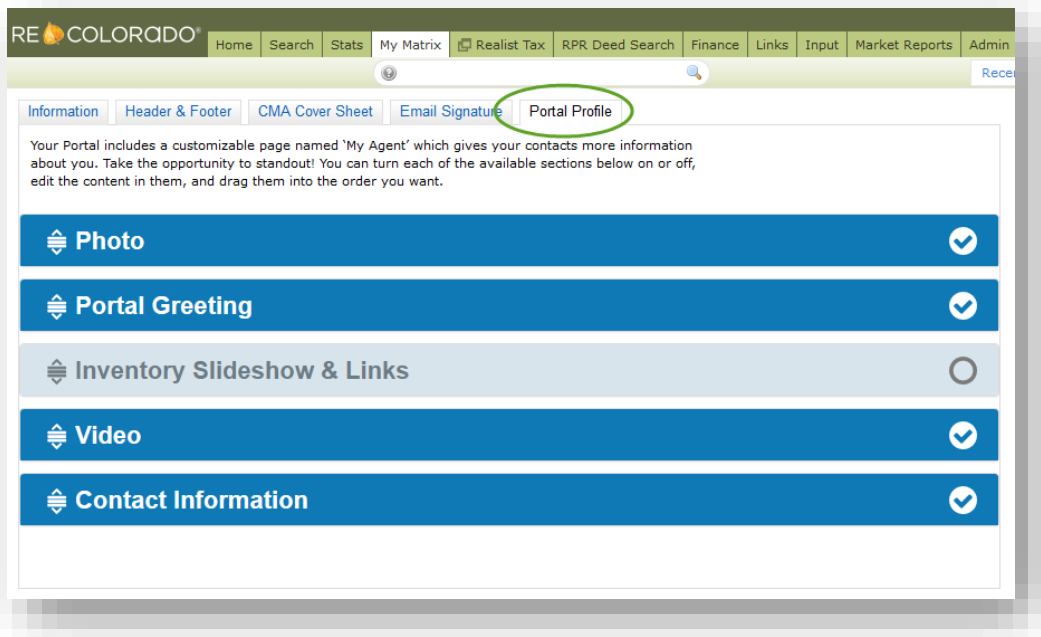
- The sections on this page expand by clicking on the title bar.

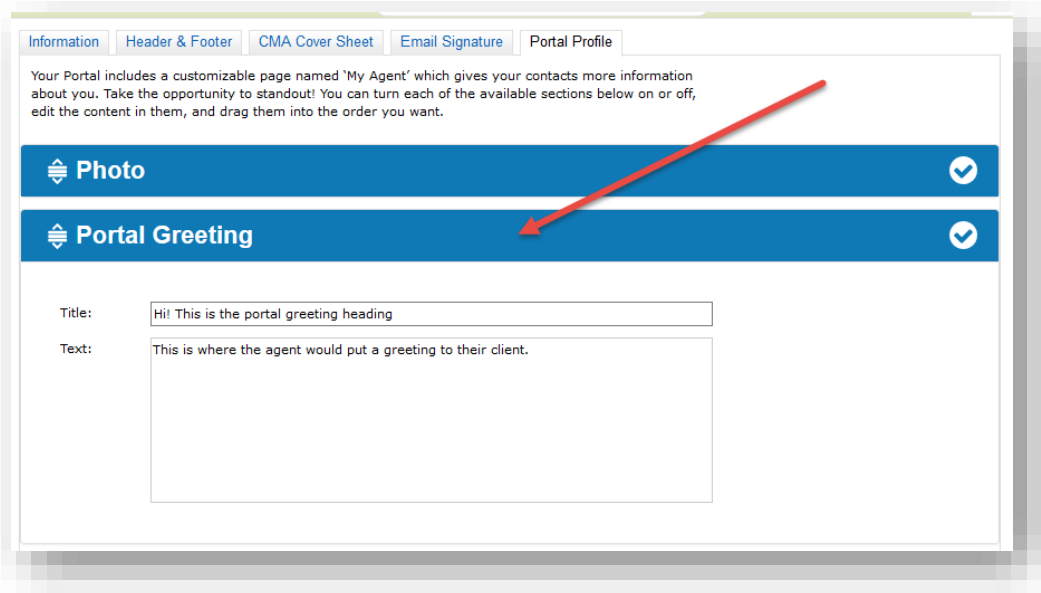- If the agent wants to include, or exclude, a particular section of the profile, they check or uncheck the circle.

- The agents can also rearrange the order in which these sections are displayed in Matrix by grabbing the bar and dragging it to the desired location, using the icon on the left side. This will affect the way sections are displayed in the portal.

- If the agent selects, in the Inventory category, to include their active listings, but they don't have any active listings, a button will still display in their profile, but no results will be returned. The consumer will be taken to the map where a message will state that no matches were found.
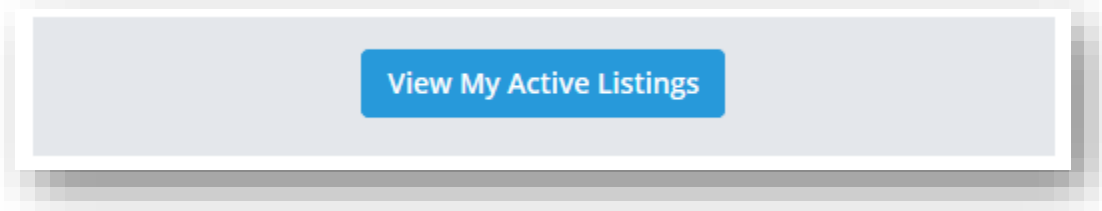
- Several pieces of information can be included in the Contact Information section, using the drop-down menu selections.
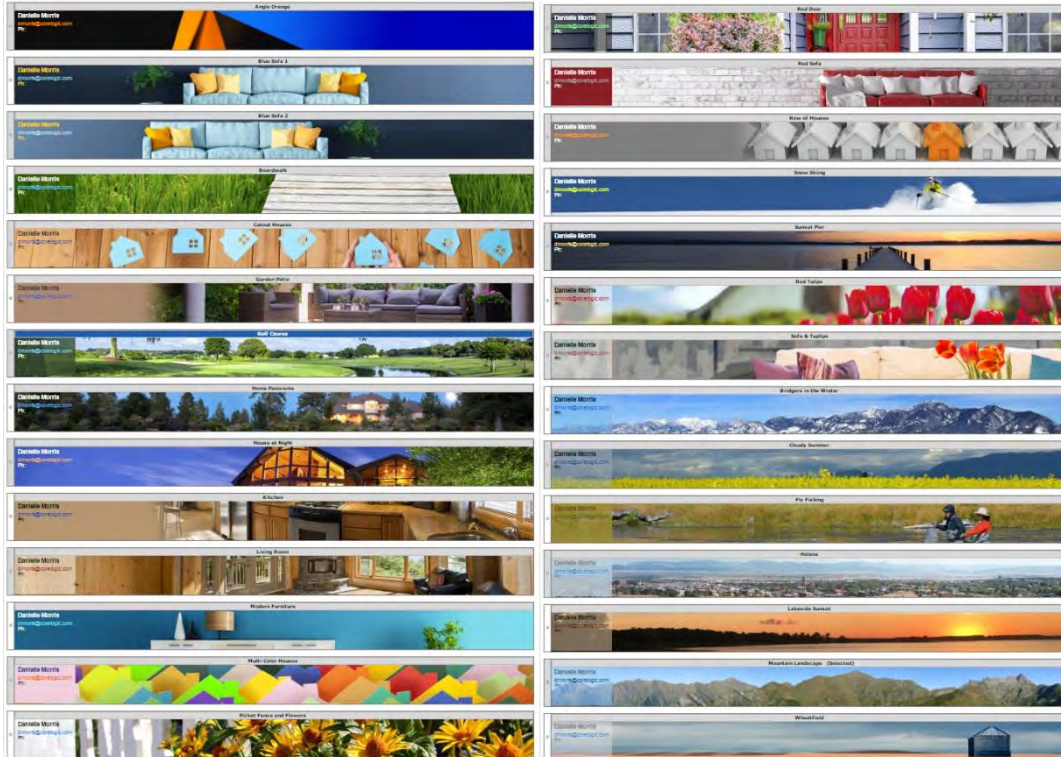

- The information available in the drop-downs is taken from the Information tab, and Marketplace.

New Agent Headers & Footers

Agent Headers and Footers have been completely updated to provide a fresh new look.

Key changes include:
- A larger header size – up to 1600 pixels wide by 120 pixels
- Option for agent-controlled branding to display over the top of the header's background image, even if the agent / broker uploads a custom image. (Only .jpg, .jpeg and .gif files are supported.)
- Simplified footers, (shown below) completely customizable by the user with up to four branding fields, are available as an option regardless of the header package

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**Considerations for Internal Release:**
- ➢ _All agent's existing headers/footers will be migrated to the new format._
- ➢ _Agents already having a Header/Footer package selected will get an updated version of that same package's image, with system-defined default branding fields displayed over the top of it._
- ➢ _Agents with a custom header image will retain that image, but no branding text will be displayed over the top of it. Also, custom header images will not automatically resize to the new 1600 x 120 dimensions. Agents will need to resize/re-upload their own images. The color they have specified as their background color will now be used as a background color for the header when printing._
- ➢ _Agents with a custom Print Footer image will lose that image, as Print Footers in Matrix 7 are text and not images._
- ➢ _Agents who have no Header/Footer specified before will have no Header/Footer after the upgrade._
- ➢ _Since the mobile portal is being retired, any settings made for mobile headers will no longer be applicable._

Notifications of Portal Activity

Agents can now be notified, via email or text, of recent Portal activity by their contacts. They can also receive a daily summary email detailing the activity for all their contacts.

- The following actions may be selected by the agent to trigger notifications:
    - A contact visits their Portal for the first time
    - A contact visits their Portal (any visit after the first time)
    - A contact adds notes to a listing
    - A contact saves a listing as a Favorite
    - A contact removes a listing as a Favorite
    - A contact saves a listing as a Possibility
    - A contact removes a listing as a Possibility
    - A contact discards a listing
    - A contact removes a list from Discards
    - A contact saves a search

- To access these controls, go to My Matrix → Settings → Portal Notification Settings
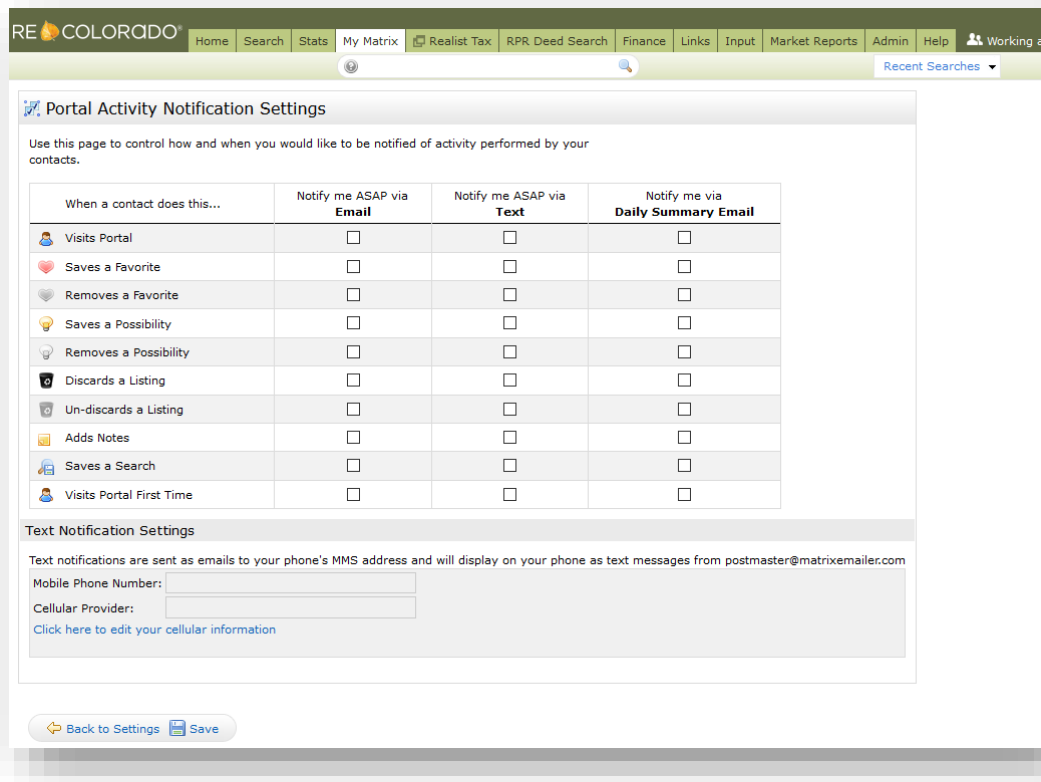
- For each notification type, the agent may choose to receive notifications and how to receive them: ASAP via email, ASAP via text, and/or in a daily summary email. They simply check the box for the type of notification(s) they want, per activity.

- To receive text notifications, the agent will have to enter their mobile phone number and provider. A one-time verification code will be sent to the agent's phone, which they will need to enter back into Matrix.

Text Notification Settings

Text notifications are sent as emails to your phone's MMS address and will display on your phone as text messages from postmaster@matrixemailer.com Enter your 10-digit mobile phone number and select your provider below. Shortly after clicking the "Send me a verification code" button you should receive a text from postmaster@matrixemailer.com. Enter the verification code from that text in order to confirm that your settings are correct.

Mobile Phone Number:

Cellular Provider:

Cancel   Send me a verification code.

- ASAP notifications of a contact visiting their Portal are sent immediately. ASAP notifications of all other activity are sent only when no other notification for that contact has been sent within the past ten minutes

- Daily Summary emails will be sent out shortly after 12:00am (midnight) each morning, and will contain details of all their clients' portal activities for the previous 24 hours.

Updated IDX Searches

IDX search and results screens have been updated to reflect many of the same changes as the Client Portal, to include:

- **Support for new, 'fluid' layouts** which fit content to the user's screen.
    - This requires the agent/broker to change the dimensions of their IDX iframe from "fixed pixel-based dimensions" to "fluid percentage-based dimensions".
        - Note: The brokerage website developer may need to make additional adjustments to their webpage where the IDX Frame is embedded for it to display as expected on all screen sizes.
- G**eographic fields on the search form**
- **Pin clustering** on the map when the number of results is between 500 and 5000

Google Maps

All map images and mapping related functionality in Matrix and the Client Portal now use Google maps, replacing Bing.

General functionality and behavior is largely unchanged, but several small differences are worth noting:

- Both street maps and satellite views are much more up-to-date in most locations
- Parcel boundaries and building footprints now display on the street map in many locations
- In the printable map display, and the map page in the CMA, each pin is now colored based on the associated listing's status.