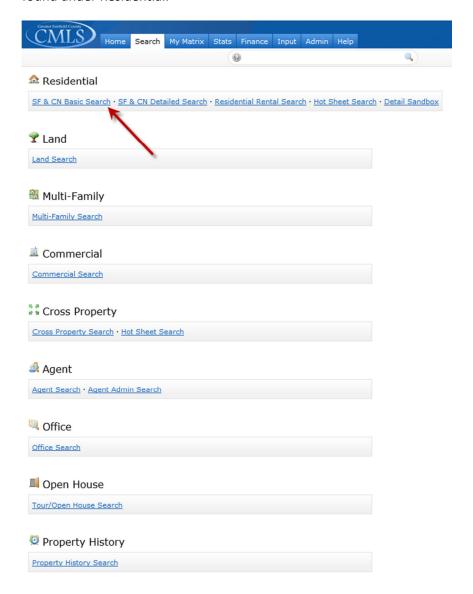
The Search Tab

The search tab contains links to each search type provided by Matrix. There are six different property type searches. All search types equate to their respective contracts and forms.

To start your search click on the search you would like to use. For example: Single Family Quick Search found under Residential.



Categories that are not used disappear off the Search Menu page. Matrix will essentially adapt itself to the agents own use, much like the menus in Microsoft Office. Secondly, the searches within a category that are not used will disappear, cleaning up the ocean of hyperlinks. The result is a very clean search menu, only showing the most utilized information, all while being very clear on how to "show more".

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

Basic search - includes the most commonly used fields.

Detailed search - includes added fields to assist in narrowing down your search.

Residential Rental Search - includes specialized fields for narrowing rental properties.

Hot Sheet Search – Searches all active and conditional sales with a default date range of 0.

in order to view listings that may have been broker loaded in the evening, you should enter 0-1 in the date range

Cross Property Search

If you do not know which property type you should search for, click on "Cross Property." This allows you to search across all six 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.

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 different selections.

Setting your search criteria

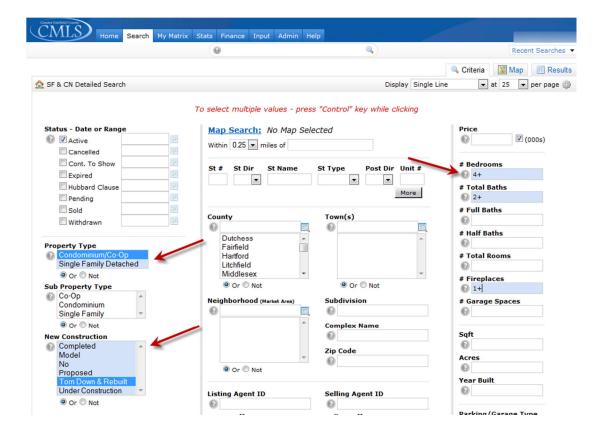
Each search type contains several search options.

By default all options are left blank until you have selected an option with the exception of status which is set to a default search of active and conditional sale.

To select an item simply click on it; in cases where you can select multiple options hold down the control key while clicking. Similarly to deselect an option hold the control key down while clicking on it.

Glowing Search Fields As soon as any criteria in any field is selected, the list box will glow a gentle light shade of blue and selected criteria inside will highlight with a darker blue. This makes the interaction feel more lively, but more importantly, when revising a search, users INSTANTLY see which fields are in use by the color they are. When revising, list boxes with an element chosen that was out of sight below in the list box, will now automatically scroll to the first one selected so users can clearly see it.

There are also certain search fields that you can enter information into such as square footage, bedrooms, bathrooms etc. If you click on the help bubble onext to each field it will provide an explanation on how to enter in your criteria.



At the top right of the search page, there are some options for displaying your search results and setting up default searches.

| Obsplay Single Line | Otto at 25 | Oper page | The Display can be set to view the listings in various different formats. The number of listings viewable per page populate in the | Otto at 25 | Oper page | Options |

Setting your default search criteria:

Select the search criteria that you would like to establish as your default. Click on the , click "Set currently selected search criteria as my starting default". 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 begin with a clean slate. As well, by clicking the "Set current Display and count per page as my starting default", it will always show the results on the results page with the Display and count per page as you set it.

Clear— 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

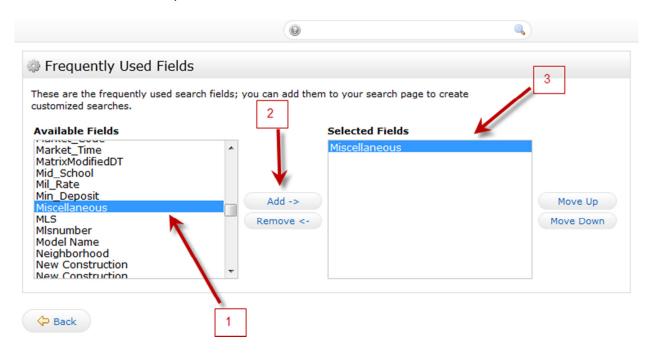
You can restore your default after using the Clear button.

Revising your search criteria:

If after reviewing the results, you decide you need to revise the search criteria, you can click on "Actions" and then "Criteria" buttons from the bar at the bottom of the screen, or click the "Criteria" Tab on the top right. Both of these will take you back to the Search Criteria page for revision.

Adding additional fields to searches:

You can add additional fields to "Narrow" your search by clicking on the "Add" button under the "Additional Fields" area at the bottom of the Search Criteria Page. Clicking this button will take you to a new screen that will allow you to choose one or more Search fields to add.



Choose the additional field that you wish to add from the "Available Fields" column on the left, then click the "Add ->" button and it will be added into the "Selected Fields" cloumn on the right. Click the Back button under the Available Fields column and you will be taken back to the main Search Criteria page. Here you will see the new field added at the bottom of the page for use.

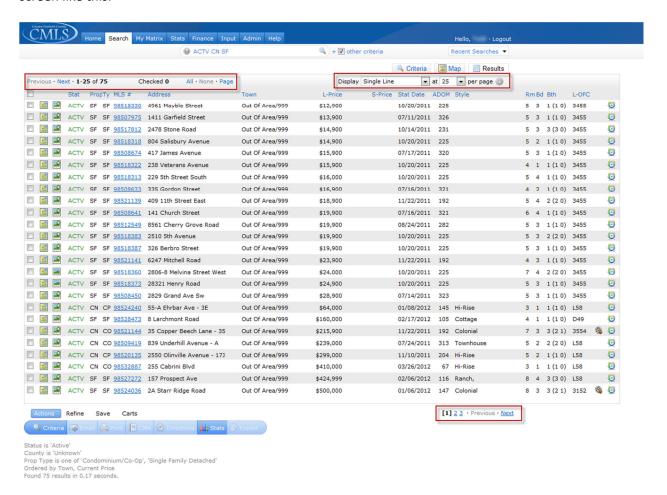
Using the Remarks sections:

This field is used as a keyword search for words or phrases that would be in the Agent Remarks, or the Public remarks.

Example: To search for properties that has the word suite in the "Agent Remarks", enter *suite* (asterisk [space] suite [space] asterisk). The asterisk (*) will command the search to only look for the word "suite". Leaving out the spaces, will represent any text in place of the * and cause "*suite" to return results like "ensuite" etc.

Searching

Once you have set up your search criteria how you want and click the Results button, you will get a screen like this.



Results 1-25 displays the first 25 listings out of 75 total results produced from the search criteria selected. If there is more than one page of listings, use these links to navigate:

Next- To view the next page of listings

Previous- To view the previous page of listings

The numbers-click on a specific number to get to a specific page

(Note: Remember from above you can select 10, 25,50 or 100 listing per display page by clicking on the drop down menu next to at___per page)

Viewing and Selecting Listings

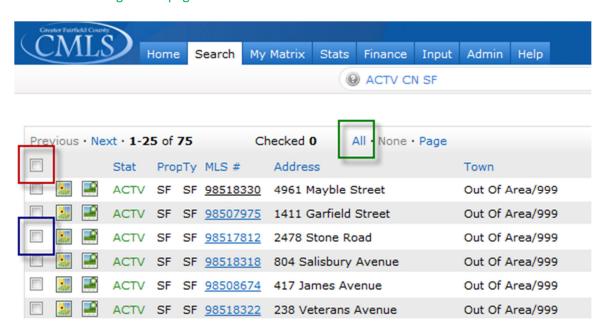
If you are viewing listings in a single line view and see a listing you want more info on you can click on the blue MLS® number link to open the listing in a "Full" view. To view the next listing click on next or the number. Once you are in full view display to get back to the original results window click on the single line display (at the top of the page.) You can also change the display view from this page by clicking on the drop down menu next to display.

Matrix gives you two different ways to work with your search results when you are selecting or deselecting properties.

To select a single property or multiple properties you can click on the box next to the MLS® number on the left side(which places a checkmark on that listing.

To select a whole page click on the top box next to Stat -this will select all the listings of the current page you are on.

To select all listings on all pages click on "ALL".



To deselect a listing(s), just click the box again to remove the check mark, or click None at the top to remove all the selected listings.

Once you have selected listings, all the buttons on the bottom bar will become active (turn Dark Blue).

Actions Tab

Criteria – click this button to return to the criteria page to revise your search criteria.

Email – click this button to Email listings to clients.

Print – click this button to print listings in one of the various formats (Single Line, Full, Summary, etc).

CMA – click this button for an in depth Comparative Market Analysis Report.

Directions – click this button to create a map with turn by turn driving directions to selected listings.

Stats – click this button to create tabular charts of the selected properties.

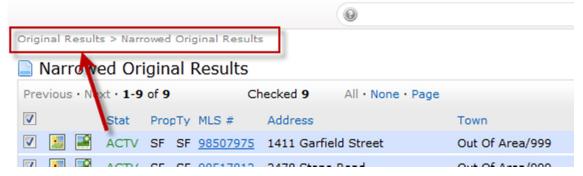
Export – click this link to export the data for use in other programs like Excel.

Refine Tab

View as – selecting a contact will allow you to see if a property has ever been sent to the client before.

Narrow – selecting this will remove all the unselected properties from the view.

(*Note: When using the Narrow button, if you wish to return to the original results, click on "Original Results" in the top left of the page under the Matrix® Logo).



Discard – selecting this will remove all the <u>selected</u> properties from the view. This will also activate the Undiscard button. Clicking undiscard will return <u>ALL</u> discarded properties to the view.

Sort – selecting this will open a new window which will allow the user to select which fields to sort by, and allow the user which order to sort them, and how they want them sorted (Ascending or Descending)

Save Tab

New Saved Search – selecting this button will allow the user to setup a saved search for a client or to use as a favorite search on their homepage.

New Auto Email – selecting this button will allow the user to setup an automatic email for a client based on the criteria setup.

New Speedbar Shortcut – Allows the user to set a speed bar shortcut name for the specified search criteria.

Carts

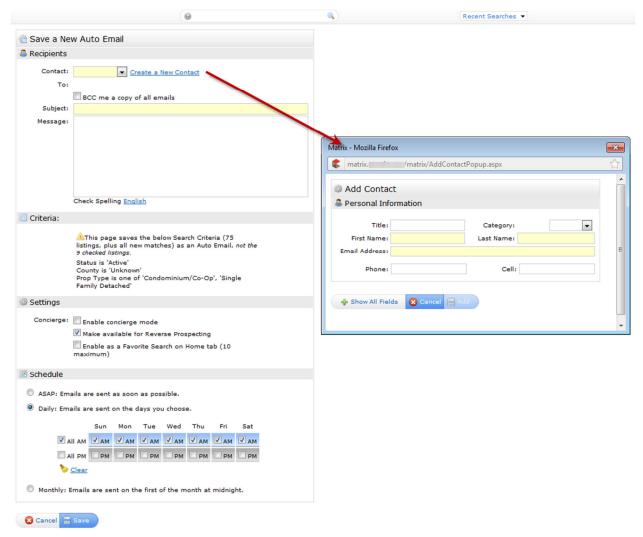
Add to cart – selecting this button will allow the user to add specific listings their own or a client's cart. View – selecting this button allows the user to view the cart that is specified in the drop down menu to right.

Auto Emails

To set up an Auto Email, setup the criteria and run a search. The total results must be less than 250. From the bottom of the page, Select "Save", then select "New Auto Email"



Select the contact you wish to send the Auto Email to from the drop "Contact" drop down menu. If this is for a new client that hasn't been set up in contacts yet, you can click the "Create a New Contact" at the right of the drop down box, and a new window will open up for adding a contact. Be sure to fill out all Yellow fields (required), review your criteria, make the settings selections, and set a schedule. Click the blue Save button to initiate the Auto Email.



(*Note – Concierge mode will require the agent to review, approve and send all auto emails before they are set out of the system).

You can send yourself a copy of the Auto Email by clicking the box next to "BCC me copy of all emails". It will be sent to the email address we have on file in Matrix. - this is a good practice as you then know the automatic email is working and you can keep up to date easily on what properties your client is receiving.

You have the option to add a message; this message will only be sent out on the original first email *Note- This message is not viewable in email history, this is why it is suggested to send a copy of the email to yourself*

For the schedule you have three options.

Daily - Select AM/PM on any day of the week

AM is emailed at approximately at 8:00AM-Pacific Time

PM is approximately emailed at 6:00PM-Pacific Time

ASAP – As soon as a listing and/or a status or price changes, it is emailed.

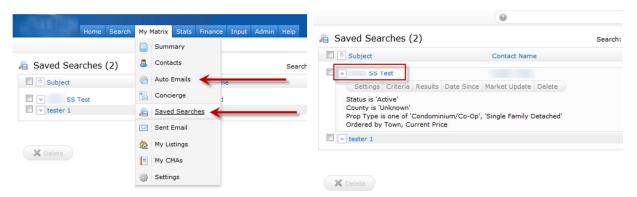
* Note: Your contact could receive several emails a day. If so, consider changing to a daily schedule instead or narrowing your search criteria*

Monthly – Sent once a month. Suggestion: If there is a client who is not going to purchase for a while, this is a good option. It will keep the client abreast of the market.

Viewing Saved searches and Auto Emails

To access your saved searches and Auto Emails, click or hover on My Matrix, then choose "Saved Searches" or "Auto Emails". (Alternatively, you could go in to Contacts, choose the contact and look up their searches.) Click on the subject line, or the arrow to the left of the saved search you wish to view, and you will get an expanded line showing a bar with tools and the current set search criteria.

*Note: In the Auto Email window," Open in Portal" is an added option to the bar.



Settings – click this to edit the search name and contact.

Criteria – click this to edit the search criteria.

Results – click this to view the results produced from the search criteria.

Date Since – click this link to get the latest results since the last time the search was run.

Market Update – click this link to choose an update type and/or update date rand in combination with the criteria of the original search



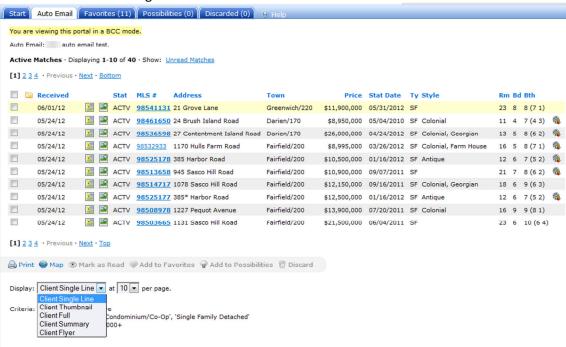
Open in Portal - is an added option of the tool bar for each Auto Email. Click this link to open the clients "Portal".

Client Portals

Click this link if you wish to Unsubscribe.

The customer portal allows your client to become more interactive with the listings that have been sent to the through Matrix's automatic email function.

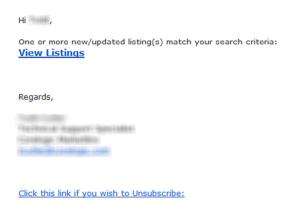
Your client will have such options as placing listings in a folder for favorite's, possibilities or discard. They are also able to print, map and mark as read. The client also has the choice of 5 possible displays in which to view their listings.



When you activate an Auto Email for a client, they will receive an "Initial" email with a link to view listings that fit their criteria. The first email will contain instructions on how to use the Client Portal, and the message you created when setting up your automatic email. Any subsequent emails will only contain the link to the customer portal and your email signature.

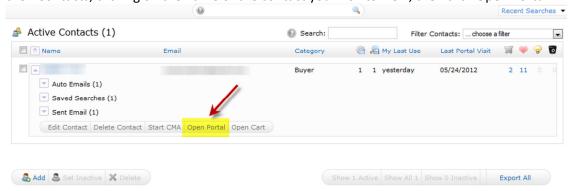
Initial Email Welcome to "The Portal" All messages I send to you containing MLS® listing information - those I send you manually as well as those I set our system to send you automatically - will contain a link to your personalized page on The Portal. You can access The Portal with your favourite web browser, where you'll be able to view the MLS® listing information I've prepared for you in several different formats. For your convenience, you'll be able to sort these listings, rate them and categorize them. You'll be able to see all associated photographs. And you'll be able to see them pinned on a map, a high-level aerial photograph or a low-level "Bird's Eye" photograph. I hope you enjoy working with The Portal and would be happy to hear your feedback. In the meantime, please click on the link below to begin your Portal experience. Complete information on how to use The Portal is available via the Help Link - a question mark to the right of your name on the right side of the screen. Click the following link to view ALL property listings Click to View Listings Note: The Web link above will expire 30 days after the date of this email.

Subsequent Emails (after initial email)



Accessing your Clients Portal (Agent)

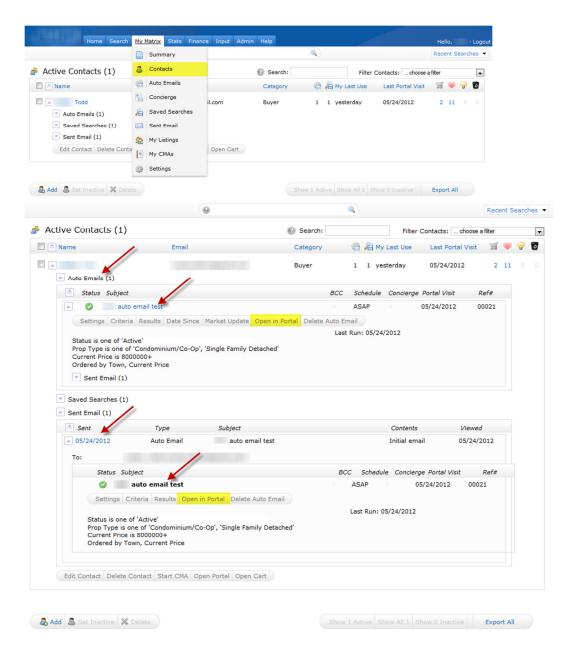
You can access the listings your client has been sent in different ways. First by clicking on My Matrix, then Contacts, clicking on the name of the contact you wish to view, then click Open Portal.



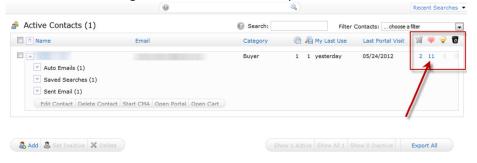
By clicking "Open Portal", you are taken to the start page of the Portal, where you can choose which "search" you wish to look at.

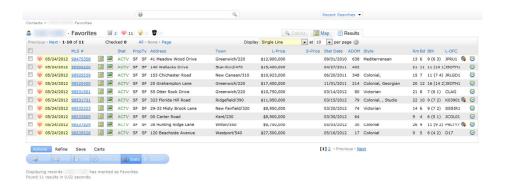


Second by opening the Auto Email associated with the portal you wish to view, or by clicking on contacts, opening the specific client information in full, then choosing either Auto Email, or Sent Email then choosing "Open in Portal".



Third by opening contacts, clicking on the blue Favorite, Possibility, or Discard numbers, you will be directed to the Listings contained in the clients portal.





Using the Email button

After you have completed your search, and have your results, you can directly email the selected properties to anybody. It is not necessary to have the recipient as a contact for a direct email. The recipient will receive an email with a link to the location of the files in Matrix (see below). They will be able to print and produce a map of the properties, but will not have the added sorting functionality of a "Contacts Client Portal".

Click the following URL to see the listings: http://matrix.ct-mls.com/DE.asp?ID=283177

Click this link if you wish to Unsubscribe.

