



CoreLogic®

# Matrix™ 7.0

Quick Start Guide



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# Introduction

## Welcome

Whether you're a seasoned veteran or brand new to Matrix™, we'd like to welcome you to version 7.0.

Matrix is mobile friendly, cross-browser compatible and has long been considered, by many, the most intuitive MLS software available today. However, like most new learning curves, there may sometimes be confusion along the way. Well, you can relax and consider this manual your personal guide to help get you to where you need to be in the quickest, most productive, way possible.

The Matrix team is always looking for new ways to improve an agent's user experience. Whether developing efficiency-rich features or creating in-depth training tutorials, we are committed to bringing the best out in you.

## A few things you should know.

Matrix is currently used by over 600,000 real estate professionals. However, because no two MLS's, or Associations, are exactly alike, some of the fields, data and images used in this guide may differ slightly from the system that you're currently working on. Rest assured, however, that the concepts are the same and that you will easily recognize the ones used here with those of your own.

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

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

Finally, if after reading this guide, you're still unclear about anything, we invite you to check out the video tutorials found in the, "Agent Support" section at [www.corelogic.com/matrixhelp](http://www.corelogic.com/matrixhelp).

Enjoy.

The Matrix Team

# NEW in this Guide

The following items have been added, or enhanced, since the Matrix 6.12 Quick Start Guide:

- 1. Header & Footer Templates:** Matrix 7.0 has enhanced how you brand your printed material and public-facing web presence. With larger banner sizes, more images to choose from plus the ability to upload your own custom background, it's easy to create your own, unique identity. Page 20
- 2. Portal Profile:** Previously known as the, "Portal Information" section, creating a Portal Profile allows you to include additional information about yourself on the Client Portal as well as your Agent Webpage. Page 24
- 3. Portal Notification Settings:** Get notified by text or email when a contact interacts with their Client Portal in a variety of ways. Perfect for the Agent who wants to stay on top of the needs of their customers. Page 28
- 4. New Client Portal:** completely redesigned from the ground up, the new Client Portal is wrapped in a modern interface and uses responsive design to automatically adjust to fit any device or screen resolution. For additional information on the Client Portal, watch the short, introductory video: <https://youtu.be/9vBoHKnmKqI> or view the Portal Quick Start Guide: [http://www.corelogic.com/product-media/asset\\_upload\\_file973\\_51420.pdf](http://www.corelogic.com/product-media/asset_upload_file973_51420.pdf).

# Home

## Home Widgets

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

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

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

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



**Note:** **important** items are represented by an, “exclamation mark” icon ⚠️

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

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

- 3 **Market Watch:** click on a status link to display all listings with a change to that selected status.

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

**Note:** see, “Market Watch (Customize)” in the, “Home” section to customize this widget.

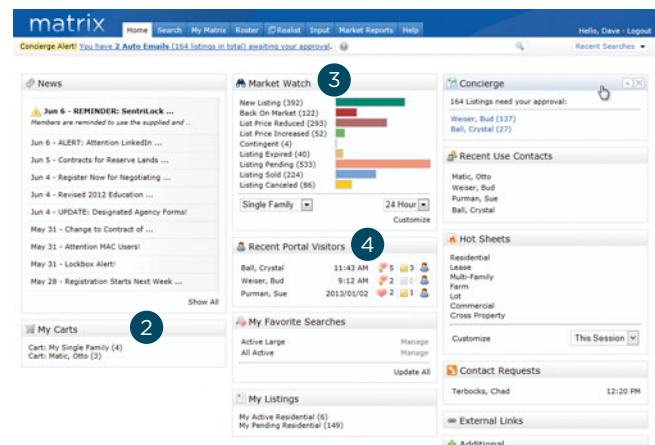
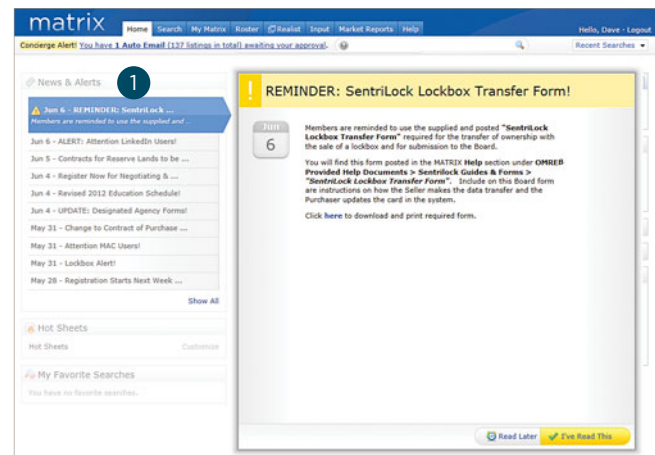
- 4 **Recent Portal Visitors:** quickly view a recent Portal visitor’s information by clicking on their name or open their Portal by clicking on the associated, “Portal” 🚪 icon.

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

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

**Note:** the Note icon 📝 indicates any new notes, to you, from a portal visitor. Click this image, or its associated number, to view the note.

**Note:** the Favorite and Possibility 📌💡📌 icons indicate where listings have been added. Click this image, or its associated number, to view the affected listings.



**5 My Favorite Searches:** click a link to display the results of your favorite saved search.

**Note:** manage your favorite search by clicking on the, “Manage” link located to the right of the saved search name.

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

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

**Note:** click, “Update All” to view the number of new listings there are for each Favorite Search since the last time the, “Update All” link was clicked.

**6 My Listings:** click a link to display all your listings (based on status and property type).

**Note:** each link displays the status, the property type and (in brackets) the current number of listings.

**7 Concierge:** click a client’s name to display all listings waiting on approval before being sent.

**Note:** each link displays the client’s name and (in brackets) the number of listings waiting on approval.

**Concierge Alert!** [You have 2 Auto Emails \(164 listings in total\) awaiting your approval.](#)

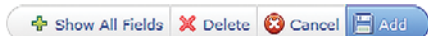
**Note:** a, “Concierge Alert” also appears, on each page, to the left of the Speed Bar textbox.

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

**9 Hot Sheets:** click on a property type link to display all listings with a status change during the specified time frame.

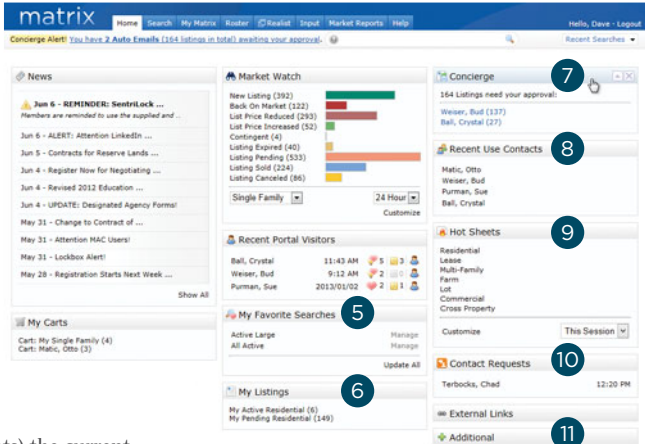
**Note:** see, “Hot Sheets (Customize)” in the, “Home” section to customize this widget.

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



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

**11 Additional:** close any widget or click and drag widget headers to/from this area to help manage the Homepage layout.



## Market Watch (Customize)

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

**2** Click the, “Map Search” link and use the map shape tools to select specific areas to watch (optional).

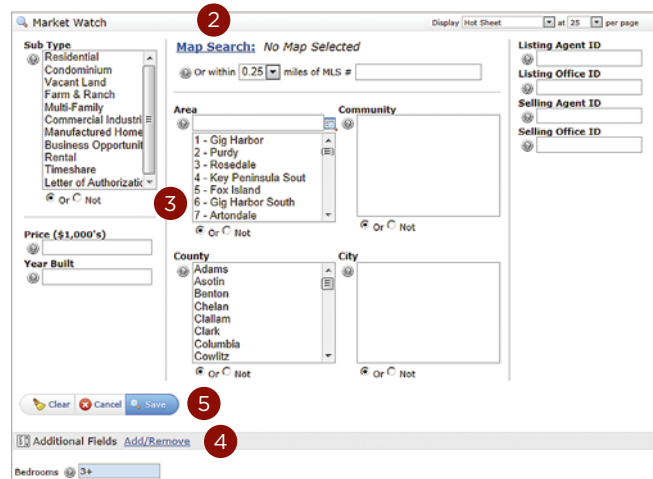
**Note:** you may also select a general location from any of the controls below the Map link.

**3** Enter the specific **criteria** that you would like to include as part of your customized search.

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

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

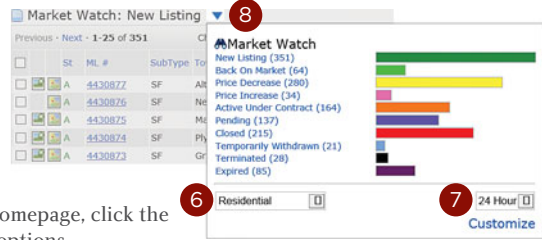
**5** Click, “Save” on the Button Bar.





- 6 Select a **property type** from the dropdown list.
- 7 Select a **time frame** from the dropdown list.
- 8 Click a **status** link to view listings that now meet your new, custom Market Watch search criteria.

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



### Hot Sheets (Customize)

- 1 From the homepage, click the "**Customize**" link on the "Hot Sheets" widget .
- 2 Select a Hot Sheet to **manage**.

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

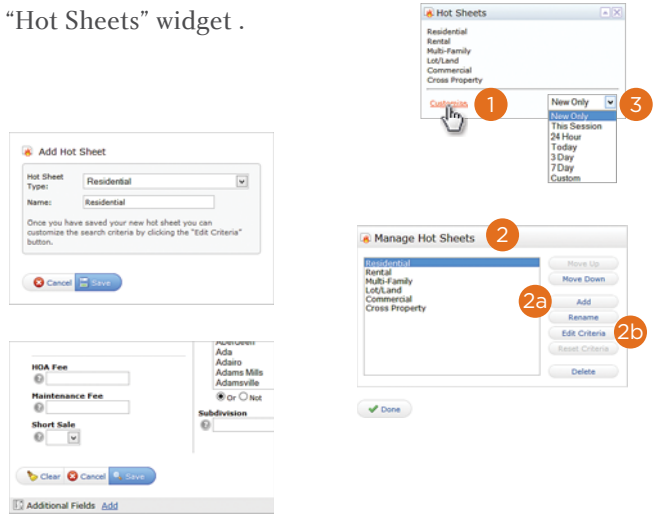
**Note:** select a Property Type from the dropdown list then name your new Hot Sheet and click, "Save".

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

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

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

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



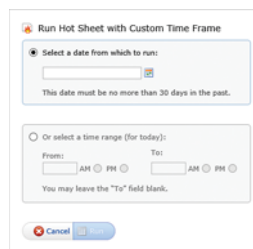
- 3 Select a **time frame** to use for your Hot Sheet.

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

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

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

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



# Search

## Criteria Search

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

2 From the dropdown list, select the desired **Property Type** (e.g. Residential, Commercial, Land, Cross-Property etc.) then click on the link for the type of search to run.

**Note:** clicking on the Search tab displays a page with all property types.

3 From the **Criteria tab**, enter your search criteria.

**Note:** click the, "Map Search" link ([Map Search:](#)) or click on the Map tab to include/exclude specific map areas to your search.

**Note:** enter price in thousands of dollars (i.e. 300+ means \$300,000 and over).

**Note:** select multiple listbox options by clicking an item while holding down the CTRL key

**Note:** select the, "Or" radio button for search results that contain any of your selected item(s).  
Select the, "Not" radio button for search results that do not contain your selected item(s).

4 Add/Remove **Additional Fields**.

5 Select the search results **Display type** and/or **number of results per page**.

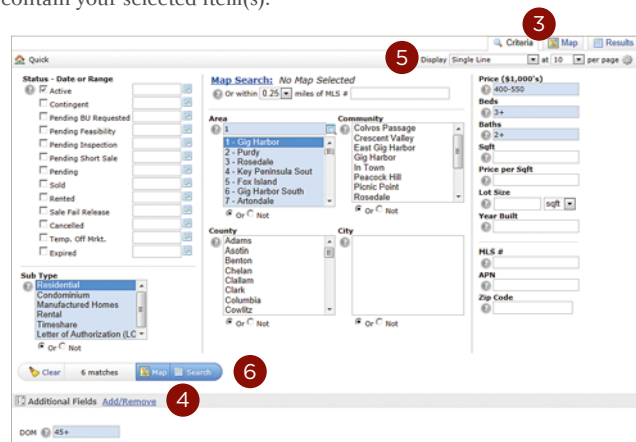
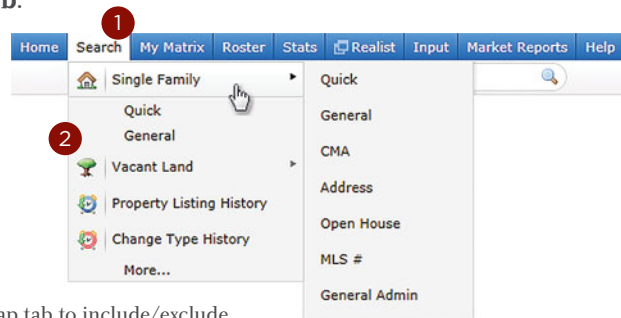
Display **Single Line** at **10** per page

**Note:** set your custom display as the default by clicking the Criteria Settings icon > Set display and count per page as default.

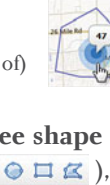





6 Click, "Search" on the **Button Bar**.

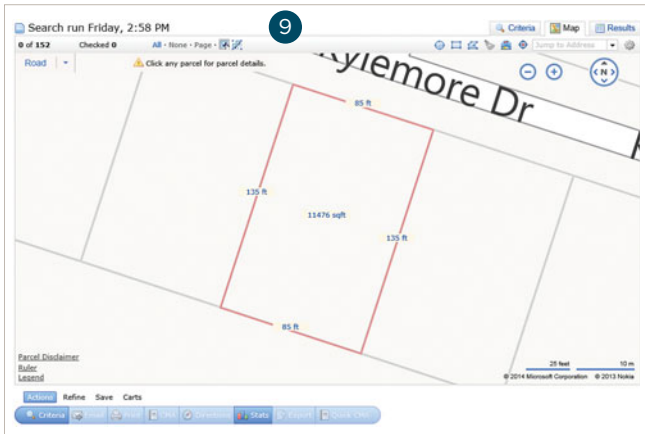
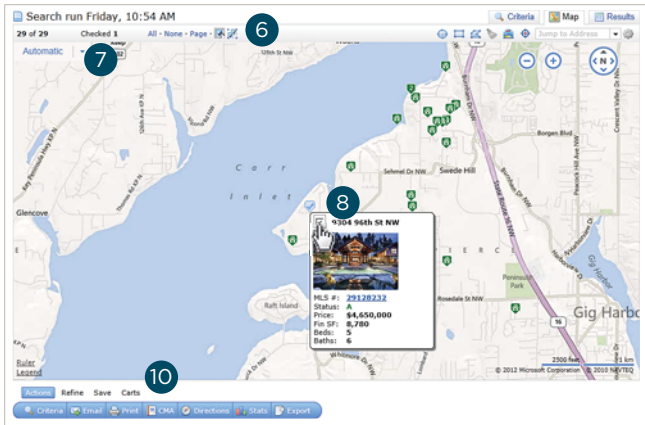
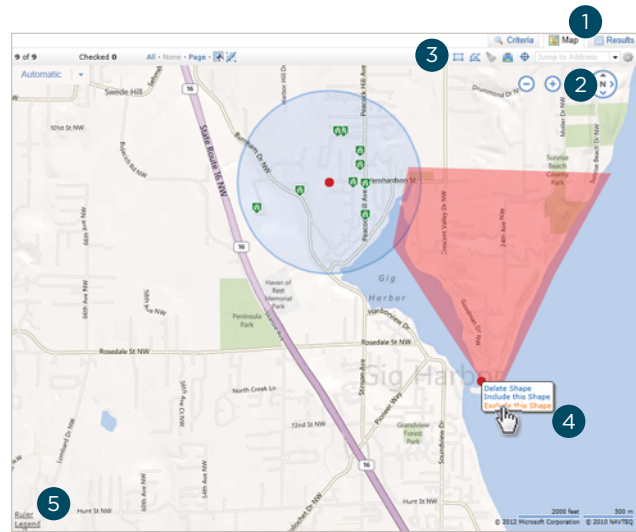
Clear 6 matches Map Search

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



## Map Search

- 1 Click the **Map** tab.
- 2 Click and drag the map or **zoom in and out** to your desired location.
  - Note:** Use the, “Jump to Address” dropdown list  to quickly locate a specific map area.
  - Note:** if your search criteria generates between 500 and 5000 results, click on a map cluster to display the (indicated number of) listings for that area.
- 3 Using one, or a combination of all **three shape tools** (Radius, Rectangle and Polygon ) , draw to isolate as many areas on the map as you like.
  - Note:** be sure you have added search criteria in the Criteria section.
  - Note:** If the number of results exceeds the maximum number of listings allowed to display (at this time, 500) then you may have to zoom in on the map or narrow your search criteria.
  - Note:** during radius sizing, shape automatically displays distance from its center to the edge.
  - Note:** clear all shapes by clicking the, “Clear All Shapes” icon .
- 4 When all areas on the map have been selected, you may choose to **Delete, Include** or **Exclude** any area simply by hovering over the shapes red dot.
  - Note:** overlap two shapes then hover either red dot > Exclude this Shape to also exclude the area where the two shapes intercept.
  - Note:** reposition a shape by clicking its red dot and dragging it to the new location.
- 5 Click the **Ruler** link, then click any two points on the map to measure the distance between them.
- 6 Select/de-select multiple listings.
  - ·  ·  · 
  - Note:** “All” selects all listings on the map whether visible in the viewport or not.
  - Note:** “None” deselects all selected map listings.
  - Note:** “Page” selects only map listings visible in the viewport.
  - Note:** clicking the, “Single Checkbox” icon  allows you to select listings, one-by-one. Clicking the, “Single Checkbox” again turns this feature off.
  - Note:** clicking the, “Multiple Checkbox” icon  allows you to select multiple listings by clicking and dragging your cursor over the desired listings. This feature automatically turns off when the listings have been selected.
- 7 Choose from either a **Road view** or **Bird’s eye view**.
- 8 View partial listing details by clicking on any **marker**.
  - Note:** from inside the map marker pop-up, click the MLS# to view the full listing display.
  - Note:** click checkbox to select listing.



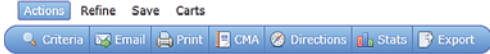
- 9 View **Lot Dimensions** by zooming in on the map, select any lot parcel and, from the information pop-up, click the "Lot Dimensions" link.

**Note:** Lot Dimensions are available for both listed and non-listed properties.

**Note:** This feature is only available for Mtrix customers using Realist®.



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




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

## Map Layers

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

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

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

- 1 Click the **Map** tab.
- 2 Click and drag the map or **zoom in and out** to your desired location.  
**Note:** use the, "Jump to" dropdown list  to quickly locate a specific map area.
- 3 Click the, **Map Layers** icon  to choose which of the following layers to activate.



**Note:** click a section panel to expand category.

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

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

Layer Category	Thumbnail Description
Parcels	Map showing individual lot parcels with street names like Kylemore Dr and 20 Mile Rd.
Zip	Map showing zip code boundaries and street grids.
City	Map showing city boundaries and names like Miamisburg, Clavson, and Berkey.
County	Map showing county boundaries and names like Hamilton and Warren.
Unified School District	Map showing school district boundaries and names like Hamilton and Warren.
Neighborhood	Map showing neighborhood boundaries and names like Rochester Hills.
Flood Zones	Map showing various flood hazard zones with a legend: <ul style="list-style-type: none"> <li>Coastal 100-Year Floodway (Dark Blue)</li> <li>Coastal 100-year Floodplain (Blue)</li> <li>100-year Floodway (Purple)</li> <li>100-year Floodplain (Light Purple)</li> <li>Undetermined (Light Green)</li> <li>Unknown or Area Not Included (Light Yellow)</li> <li>Out of Special Flood Hazard Area (Orange)</li> <li>500-year Floodplain including levee protected area (Yellow)</li> </ul>

5 Click to expand the **Property Characteristics** section.

**Note:** contains detailed information about individual properties.

**Note:** click any parcel for parcel details.

The image displays eight interactive map panels for property analysis:

- Click-To-Identify:** Shows a map with a highlighted parcel and a data panel for 3318 Talbot Drive, Troy, MI. Details include owner name (KRAUSOFF DAVE), sale price (\$202,370), and lot dimensions (130 R, 141 R, 137 R, 36 R, 132 R, 25 R).
- Lot Area:** Shows a map with lot dimensions (e.g., 2022 SF, 2722 SF, 3100 SF, 3246 SF).
- Property ID:** Shows a map with parcel IDs (e.g., 07-12-405-008, 07-12-405-009, 00-035).
- Bed/Bath:** Shows a map of a street named Alyssa Ct with room counts (e.g., 4/3, 4/3, 4/3, 4/3, 4/3, 4/3, 4/3, 4/3).
- Building Area:** Shows a map with building footprints and areas (e.g., 754 SF, 754 SF, 2350 SF, 3680 SF, 2400 SF).
- Owner:** Shows a map of a street named Aladena Ave with owner details for 430 N Aladena Avenue, Royal Oak, MI. Details include sale price (\$255,453), sale date (02/21/2006), and lot dimensions (1941, 1610).
- Address:** Shows a street view of E 5th St with house numbers (e.g., 802, 804, 806, 808, 810, 812, 814, 816, 818, 820).

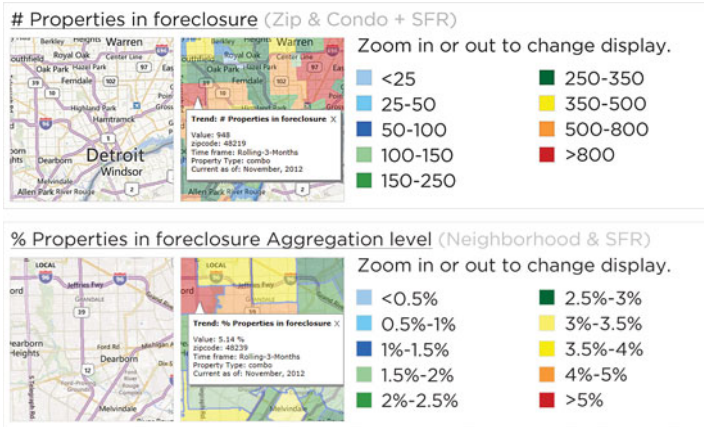
6 Click to expand the **Trends** section.

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

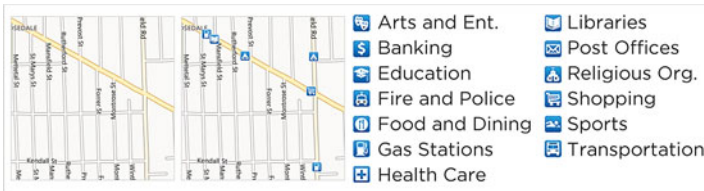
**Note:** ctrl-click any shaded area for layer details.

The image displays four trend analysis maps, each with a legend and zoom controls:

- Median Sale Price (Zip & Condo + SFR):** Legend includes price ranges: <\$100K, \$100K-\$200K, \$200K-\$300K, \$300K-\$400K, \$400K-\$500K, \$500K-\$600K, \$600K-\$700K, \$700K-\$800K, \$800K-\$1M, >\$1M.
- RealAVM™ (Automated Valuation Model - Neighborhood & SFR):** Legend includes price ranges: <\$100K, \$100K-\$200K, \$200K-\$300K, \$300K-\$400K, \$400K-\$500K, \$500K-\$600K, \$600K-\$700K, \$700K-\$800K, \$800K-\$1M, >\$1M.
- Sales Activity (Zip & SFR):** Legend includes sales volume ranges: <10, 10-25, 25-50, 50-100, 100-150, 150-300.
- Median Sq Ft cost (Neighborhood & SFR):** Legend includes cost per square foot ranges: <\$25, \$25-\$50, \$50-\$100, \$100-\$200, \$200-\$300, \$300-\$400, \$400-\$500, \$500-\$1000.

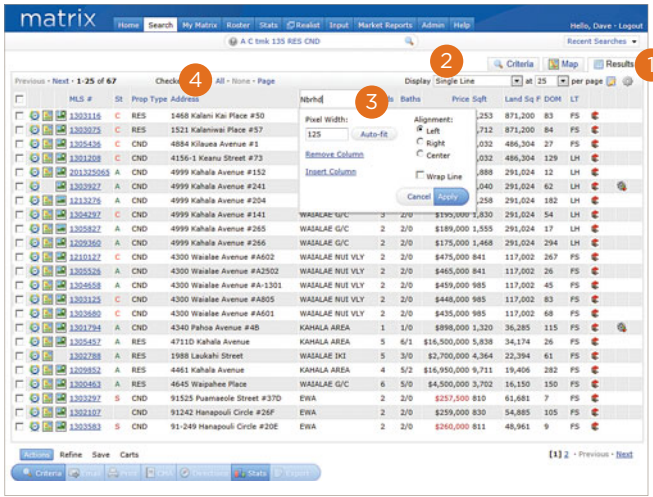


- 7 Click to expand the **Points of Interest** section.  
**Note:** Bing-provided, local business and community location markers.



**Search Results**

- 1 Click the **Results** tab.
- 2 **Change your view** by selecting a new Display from the Display dropdown list. You may also **switch the sort order** by clicking a column heading as well as change the number of results per page by selecting a new value from the Page Count dropdown list.  
**Note:** click the, "Settings" icon then the, "Set current display, sort order and count per page as my Search starting default" link to save your settings as the new default for future search results.  
**Note:** click the, "Settings" icon then the, "Reset to the system defaults" link to reset the Display and page count.



- 3 **Customize** the display columns.  
**Note:** while in, "Single Line" display mode, click the column header to open the column's property dialogue box (do not click the header text as this will only affect the column sort order).  
**Note:** an existing column may be renamed, removed, resized or realigned.  
**Note:** new columns may be added by clicking the, "Insert Column" link.  
**Note:** "Apply" any changes then click the, "Manage Display" icon to save your new Custom Display.  
**Note:** if you forget to save your Custom Single Line Display, it will automatically be added to your Display dropdown list by setting it as your new default (via the, "Settings" icon).  
**Note:** to create, or manage, a Custom Display, also see, "Custom Displays" under, "Settings" in the, "My Matrix" section.

- 4 **Select/deselect** multiple listings.  
  
**All:** selects all listings whether visible in the viewport or not.  
**None:** deselects all selected listings.  
**Page:** selects only listings currently visible in the viewport.

5 Click Previous/Next to view **additional listing results**.

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



**Note:** see, “Button Bar” section for a full list of Button Bar functionality.

7 Click an MLS# to view **listing details**.

8 View **listing photos**.

**Note:** hover over the main listing photo and click either arrow to cycle through the photos.

**Note:** the number of photos available is displayed in the left corner of the photo taskbar.

**Note:** click the main listing photo, or the Expand icon in the photo task bar, to open photos in a modal pop-up window.

**Note:** click the New Window icon in the photo taskbar to open photos in a new window.

**Note:** to play/pause the photo slideshow, click the play/pause button located in the right corner of the photo taskbar.

9 View **additional listings results** by clicking the, “Previous/Next” links.









10 **Return to your original search results** by clicking the, “Return to [my default] display” link.

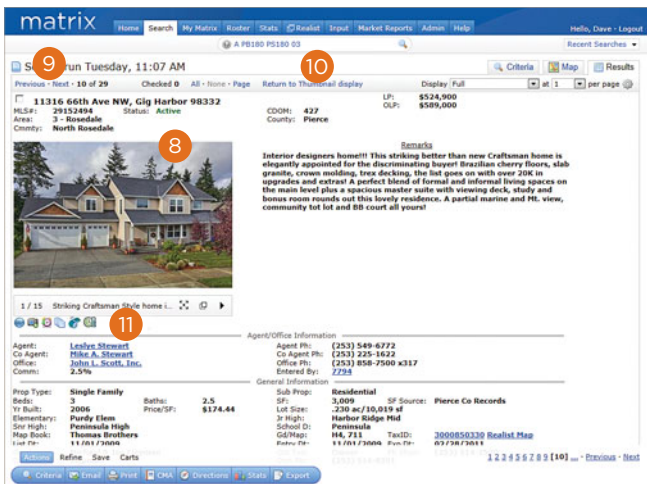
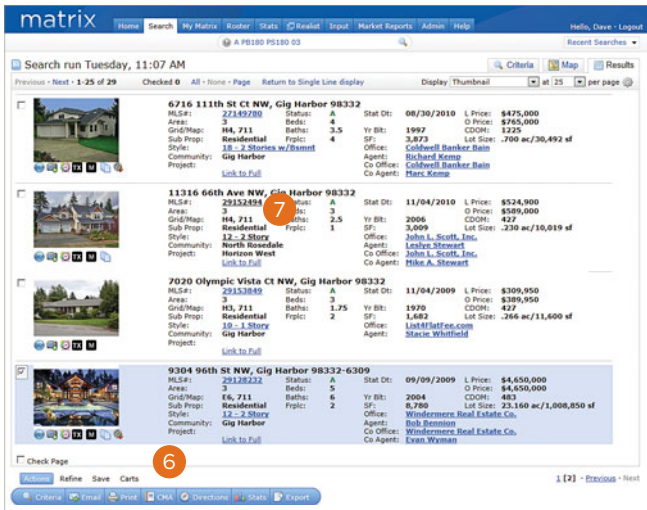
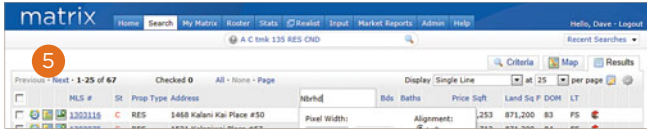
**Note:** [my default] will display as your default display type (e.g. Single Line, Multiline, Thumbnail etc.).

**Note:** changing the display type in the Display dropdown list will also return you to your search results.

11 View **additional listing options**.

**Note:** though some MLS's may display additional icons, the following are included in most systems.

-  **Map:** view listing location on a map.
-  **Photo:** view listing photo/slideshow pop-up.
-  **Supplements:** view listing supplements.
-  **Change History:** view listing change history.
-  **Property History:** view property listing history.
-  **Watch Listing:** add listing to watched list.
-  **Tax:** view listing tax record.
-  **Virtual Tour:** view listing virtual tour.



## Speed Bar Search

- 1 Enter **shorthand search criteria** into the textbox.



**Note:** every MLS choose their own shorthand definitions. For example, for one MLS, the Speed Bar shorthand criteria above would read: (show me all) Active, Sold, Pending Backup offers (from the past 180 days) and Pending Short sales (from the past 180 days), in the 03 (Rosedale) area, that are RESidential with 2+ bedrooms and 3+ bathrooms.

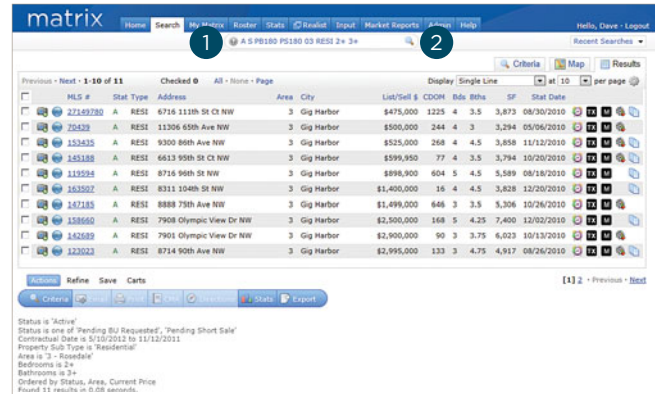
**Note:** click the Speed Bar help icon for additional shorthand definitions.

**Note:** if there is criteria you use often that is not represented by a shorthand, you may create your own Speed Bar shortcut (see the, “Speed Bar Shortcut (Create)” section).

**Note:** shorthand can be entered in any order—with the exception that bedrooms must be entered before bathrooms and statuses must be grouped together (i.e., as indicated by “A S PB PS” in the criteria above).

**Note:** each shorthand must be separated by a space.

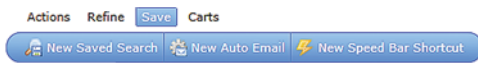
**Note:** shorthand criteria automatically populate the textbox immediately after each standard search is run. Hover over the, “other criteria” checkbox to view criteria that is not represented by shorthand criteria.



- 2 Click the, “Search” icon .

## Speed Bar Shortcut (Create)

- 1 Create a search.
- 2 From the, “Results” or “Map” tab, click, “Save” > “New Speed Bar Shortcut” on the Button Bar.

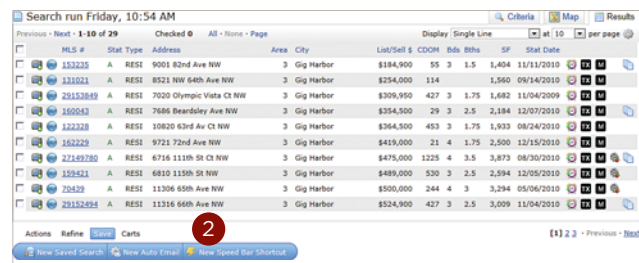
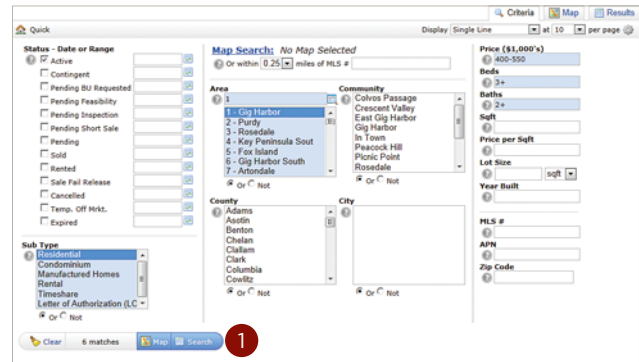


- 3 Create a **custom name** for your new Speed Bar Shortcut.

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

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

- 4 Click, “Save”.



**Save a New Speed Bar Shortcut**

Speed Bar Shortcut:  3

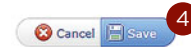
Description (optional):

Criteria: Latitude, Longitude is around 47.63, -122.24, is around 47.61, -122.09

---

**Existing Shortcuts**

Latitude, Longitude is around 47.63, -122.24, is around 47.61, -122.09





## Speed Bar Shortcut (Use)

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



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

**Note:** Speed Bar Shortcut may be combined with other Shorthand criteria.

- Click, the Speed Bar “Search” icon .

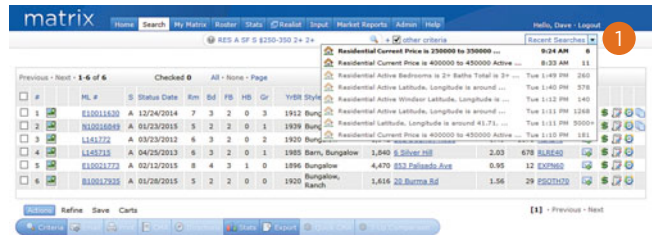
## Recent Search

- From the “Recent Search” dropdown list, select the previously run search criteria you would like to use.

**Note:** lists up to 50 of your most recent searches.

**Note:** unused searches are automatically removed after 1 week.

**Note:** each list item contains search criteria, a date/time stamp (when search was last run) and the number of results that were generated.



## INRIX Drive Time™

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

- Choose any method to generate your search results.

**Note:** for more information, see the, “Search” section.

- Click the, “Map” tab.

- Click the, “INRIX”  icon.

- From the pop-up, select your Drive Time criteria.

**4a** Add the address.

**4b** Select if this is the address you will be driving to or from.

**4c** Select what time you would like to reach your destination.

**4d** Select how long you would like to drive for.

**4e** Click the, “Add” button to view your results.

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



# My Matrix

## Contacts (Add)

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

2 Click, “**Add**” on the Button Bar.



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

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

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

4a Select the, “**Enable Reverse Prospecting**” checkbox to show the listing agent that their listing has been sent to this (anonymous) contact.

**Note:** for more information on “Reverse Prospect” see, “My Matrix > My Listings” in the “Button Bar” section.

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

4c Select the, “**Mortgage Pre-Approved**” checkbox if this contact has been pre-approved (this will be indicated in the listing agent’s reverse prospecting section).

**Note:** for more information on “Reverse Prospect” see, “My Matrix > My Listings” in the “Button Bar” section.

5 Click, “**Save**” on the Button Bar.

Personal Information

Title:

Category:

First Name:  Last Name:

Middle Name:  Suffix:

Additional Name:

Email Address:

Salutation:

Web Site:




Enable Reverse Prospecting

Mortgage Pre-Approved

Active Contacts (4)

Name	Email	Category	My Last Use	Last Portal Visit			
Bali Crystal	realcomhomebuyer@gmail.com	Buyer	3:44 PM	never			
Free Bjorn	realcomhomebuyer@gmail.com	Prospect	3:44 PM	never			
Matik Otto	realcomhomebuyer@gmail.com	Seller	yesterday	5/29/2012	3	7	10
Perman Sue	mymatrixhomebuyer@gmail.com	Buyer	never	never			

## Contacts (Manage)

- 1 View number of, “Contacts” displayed.
- 2 Search for contacts by name or by filter.
- 3 Click the, “Expand”  icon to open a section panel. Click the, “Collapse”  icon to close a section panel. Click the, “Collapse All”  icon to close all subsection panels at once.

### 4 Manage Contact.

[Edit Contact](#) [Delete Contact](#) [Start CMA](#) [Open Portal](#) [Open Cart](#)

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

**Delete Contact:** permanently delete this contact.

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

**Open Portal:** open this contact’s portal.

**Open Cart:** open this contact’s cart.

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

**5a Portal Activity:** view a timeline of this contact’s most recent Portal activity.

**Note:** includes only the most recent Portal activity.

**Note:** click an, “Activity” link to view the specified action.

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

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

[Settings](#) [Criteria](#) [Results](#) [Date Since](#) [Market Update](#) [Open in Portal](#) [Resend Welcome](#) [Delete Auto Email](#)

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

**Criteria:** modify this Auto Email’s search criteria.

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

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

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

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

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

**Delete Auto Email:** permanently delete this Auto Email.

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

**Note:** for more information, see, “Saved Searches” in the, “My Matrix” section

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

[Edit CMA](#) [View CMA](#) [Email CMA](#) [Delete CMA](#)






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

**View CMA:** view this CMA (.pdf).

**Delete CMA:** permanently delete this CMA.

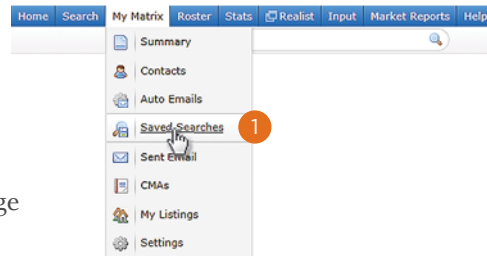
**Note:** CMAs are stored on the server for 180 days. To reset the 180 day lifespan, simply make a change to the CMA then resave.

- 5f **Sent Email:** view a collection of recent emails sent to this contact.
- 5g **Reverse Prospect History:** view a collection of reverse prospecting emails sent/received.
  - Listing #:** click to view the message sent/received.
  - Ref #:** contact reference number the buyer's agent uses to lookup their contact while keeping the contact's name confidential (only visible for Sent Reverse Prospecting Emails).
  - Recipient:** name of the agent the email was sent to.
  - Date Sent:** date the email was sent (displays Time if sent today).
  - Date Viewed:** displays the date of when the buyer's agent read the email ("Never" indicates unread).
  - Contact Name:** click to display your contact's detailed information (only visible for Received Reverse Prospecting Emails).

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

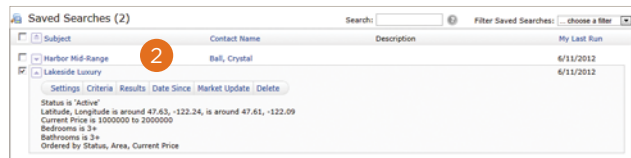
### Saved Searches

- 1 From the Matrix navigation menu, hover the, "My Matrix" tab and select, "Saved Searches".
- 2 Click, the **Saved Search name** you would like to manage and select an action.

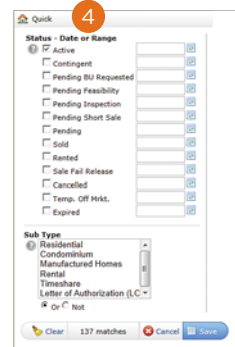
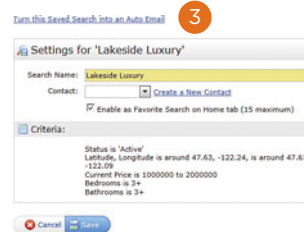


Settings Criteria Results Date Since Market Update Delete

- 3 Click, "Settings" to update your Saved Search name, assign the search to a specific contact or add/remove it as a Home Page favorite.
  - Note:** saved search can also be turned into an Auto Email.
  - Note:** a criteria summary may be viewed, but not updated.



- 4 Click, "Criteria" to update your Saved Search criteria.
  - Note:** for more information, see, "Criteria Search" in the, "Search" section.



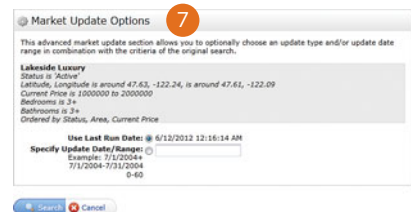
- 5 Click, "Results" to display the results of your Saved Search.
  - Note:** for more information, see, "Search Results" in the, "Search" section.

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

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

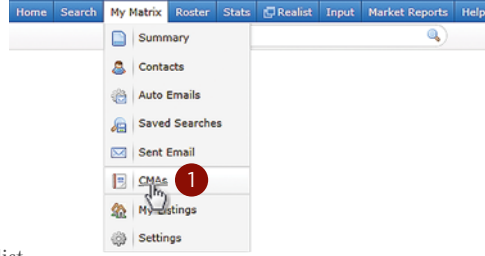


- 8 Click, "Delete" to permanently delete your Saved Search.

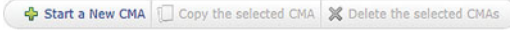


## CMA (Create)

1 From the Matrix navigation menu, hover the, “My Matrix” tab and select, “CMA”.



2 Click, “Start a New CMA” on the Button Bar.



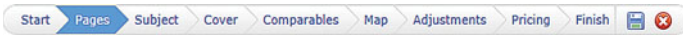
**Note:** see, “My Matrix > CMA” in the “Button Bar” section for a full list of Button Bar functionality.

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

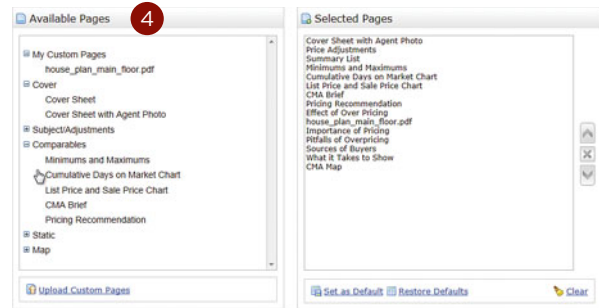


**Note:** from the dropdown list, you may also change your CMA property type as well as add an optional description in the textbox provided (description will not be visible on the final CMA).

4 Click **Pages** to select from, “Available Pages”.

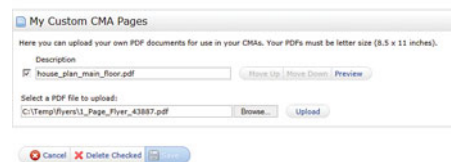


**Note:** add Custom Pages (.pdf only) to your CMA by clicking the, “Upload Custom Pages” link located below the, “Available Pages” listbox. By default, you are limited to 5 “My Custom Pages” - each with a maximum file size of 250KB. Only letter size content can be properly accommodated (landscape or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



**Note:** in the, “Available Pages” listbox, click the, “Expand” icon next to a category to reveal the available pages. Alternatively, click the, “Collapse” icon to hide the available pages.

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

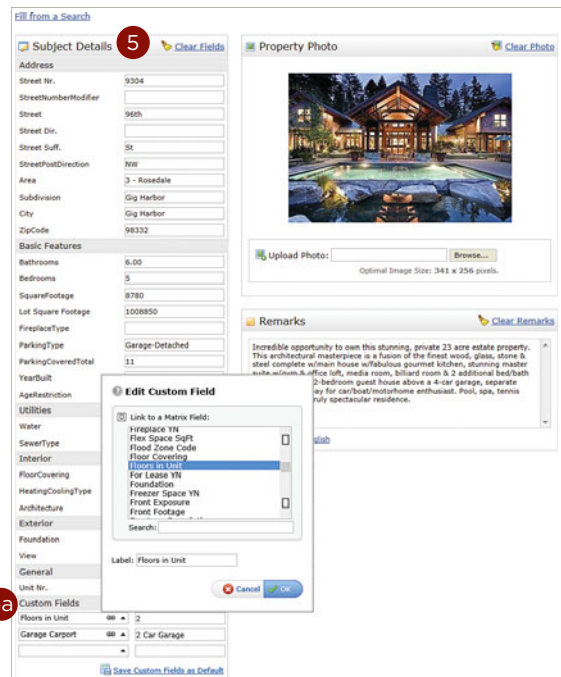


**Note:** in the, “Selected Pages” listbox, select a page, or multiple pages (while pressing the CTRL key), and use the, “Remove” icon to remove page(s) from the final CMA.

**Note:** click the, “Set as Default” link to set the selected pages as your starting default for all future CMAs. To restore default pages after removing or reordering pages, simply click the, “Restore Defaults” link.

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

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



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

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

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

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



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

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

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



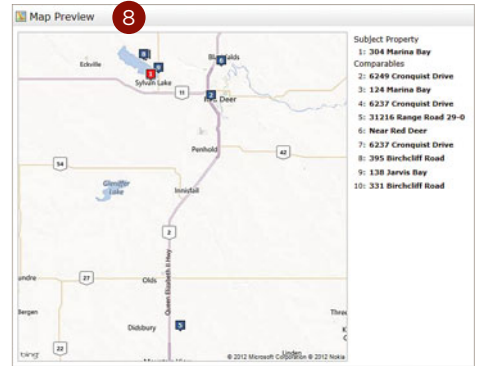
**Note:** for more information, see, "Criteria Search" in the, "Search" section.

MLS #	Stat Type	Address	Area	City	List/Sell \$	CDOM	Beds	Baths	SF	Stat Date
20000001	RESI	4719 226th Ct SE	540	Sammamish		0	4	2.5	3,390	10/26/2011
20000002	RESI	2340 N Hopkins Dr	25	Feunika	\$264,500	0	4	2.5	3,176	02/01/2000
20000003	E	12440 Koopson Rd	453	Rainier	\$969,000	0	4	3	3,862	07/28/2000
22218477	A	RESI 31 Knights Lane	900	San Juan Island	\$1,850,000	1411	3	1.75	2,092	08/02/2010
22026028	A	RESI 5405 S Crawford Rd	811	Langley	\$995,000	1411	3	3	3,373	06/10/2010
22042553	A	RESI 1182 Rosario Rd	901	Orcas Island	\$350,000	1382	2	1		03/16/2007
22046485	A	RESI 8713 363rd St E	88	Puyallup	\$249,900	1371	3	2.5	1,774	03/21/2007

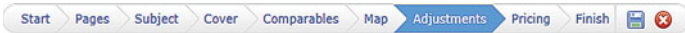
8 Click **Map** to include a map that displays the location of comparables in relation to the subject property.



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



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



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



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

Feature Value	Status	Price Adjusted Price	Bathrooms	Bedrooms	Square Footage
9304 96th St			6.00	5	8780
Mundwin	Active	1	85,001	0	60,000
XXX Atlas Island	Active	13,500,000	13,577,500	-75	52,500
2340 N Hopkins Dr	Sold	264,500	364,500	2.50	36,000
22026028	Sold	50,000	115,000	1.00	50,000
2802 232nd Ct #33	Expired	59,500	154,500	2.00	40,000
12440 Koopson Rd	Expired	969,000	1,004,000	3.00	30,000
Low		1	85,001		
Median		162,000	209,750		
Average		2,473,834	2,531,750		
High		13,500,000	13,577,500		

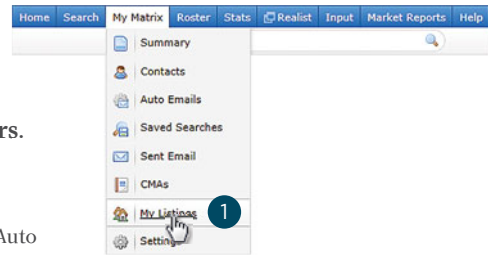
11 Click **Finish** for a, "CMA Summary" and to view or email your completed CMA.



Comparable Price	Low	Median	Average	High	Count
Comparable Price	1	162,000	2,473,834	13,500,000	6
Adjusted Comparable Price	85,001	209,750	2,531,750	13,577,500	6

## My Listings

1 From the Matrix navigation menu, hover the, “My Matrix” tab and select, “My Listings”.



2 Click the, “Display” dropdown list to select the listing Hit Counters.  
**Note:** all columns are re-calculated nightly.

### 2a Client Data

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

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

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

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



### 2b Agent Data

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

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

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

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

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

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

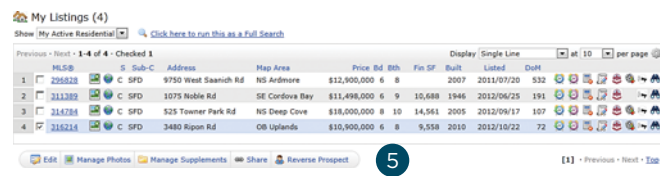


**Note:** running your listings as a search allows for additional functionality. See, “Search Results” in the, “Search” section for more information.

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



**Note:** see, “Button Bar” section for a full list of Button Bar functionality.



6 Copy a URL from the “Public Listing Links” section to share your listings to a webpage.

**Note:** an iframe is a perfect way to include your listings in an existing webpage. For example, save, and run, the following text as, “mylistings.html” (be sure, however, to update the iframe src to a URL from your, “Public Listing Links”).



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

```
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
  <title>My Listings</title>
</head>
<body>
  <iframe src="http://mymls.com/Matrix/Listings/3161832/My Active Residential.mls" width="860px" height="520px" frameborder="0" marginwidth="0" marginheight="0"></iframe>
</body>
</html>
```

## Settings

- 1 From the Matrix top menu, hover over the, "My Matrix" option then click, "Settings".
- 2 Click the, "My Information" link to review your contact information.

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

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

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

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

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

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

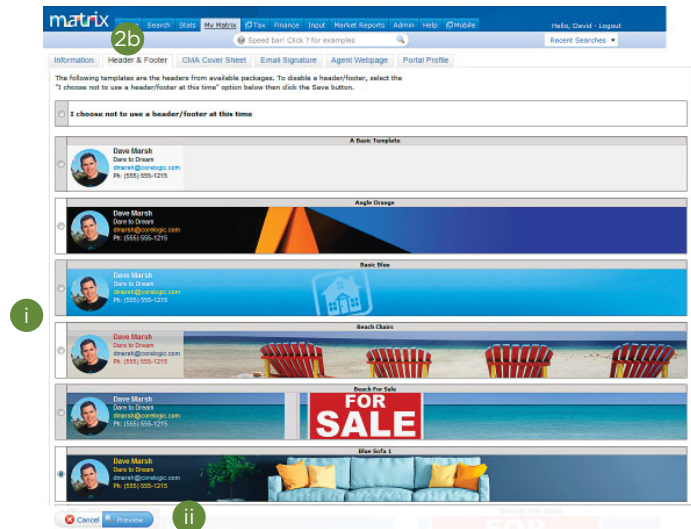
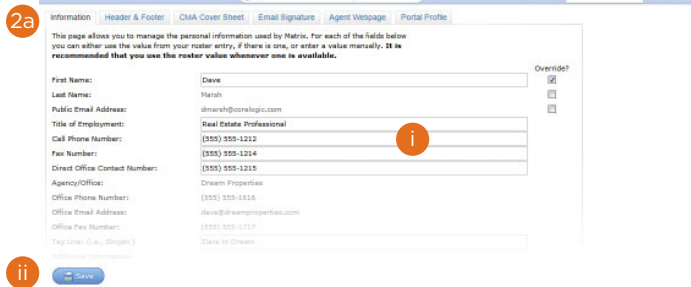
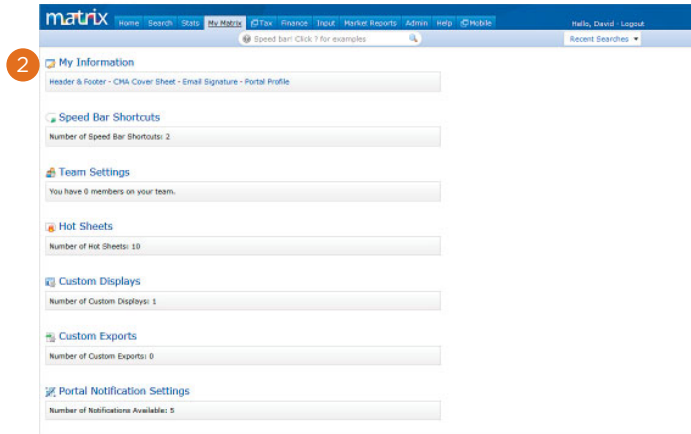
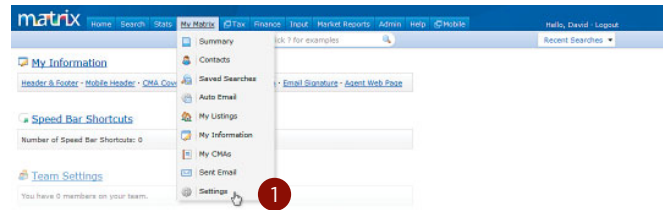
**Note:** branding will appear on the Client Portal, the Agent Web Page as well as printed Reports and Displays.

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

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

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

- ii Click the, "Preview" button.





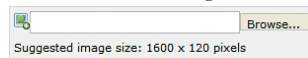
## Customize Header

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

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

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

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



iv Choose an **Agent Photo**.

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

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

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

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

vi Choose a **color theme**.

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

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

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

## Customize Print Footer

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

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

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

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

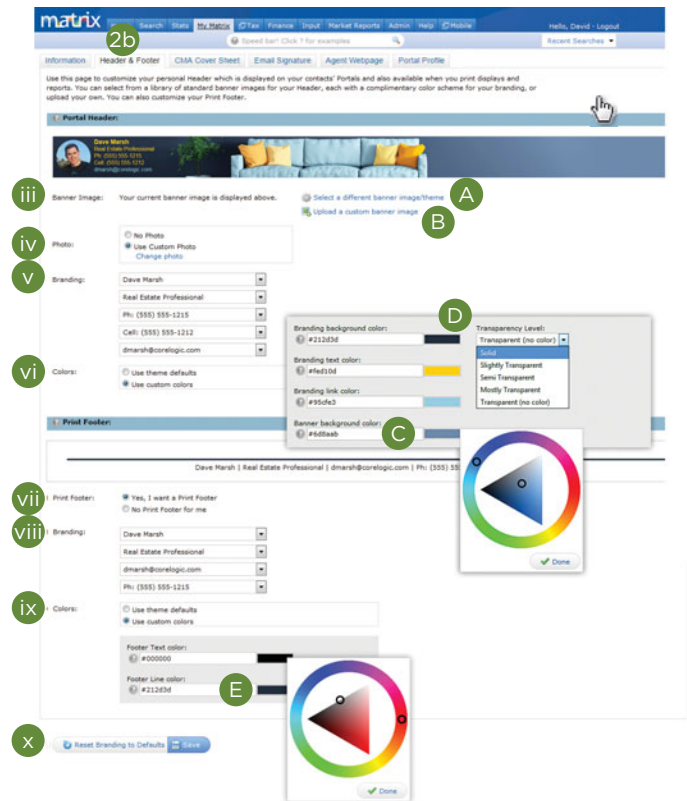
ix Choose a **color theme**.

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

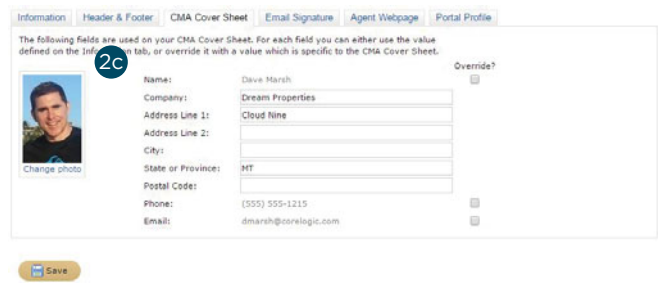
## Save Header & Footer Configuration

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

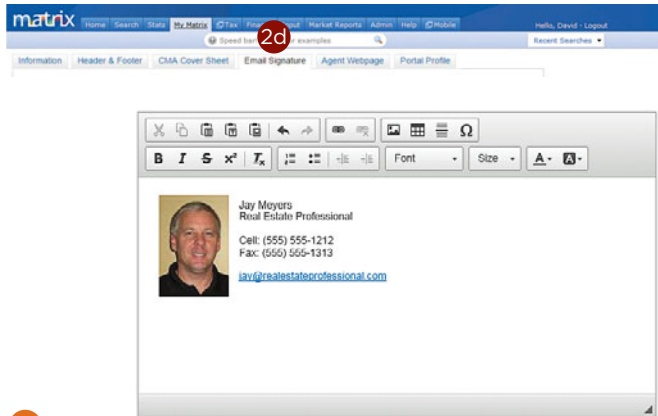
**Note:** click the, "Reset Branding to defaults" to restore your defaults.



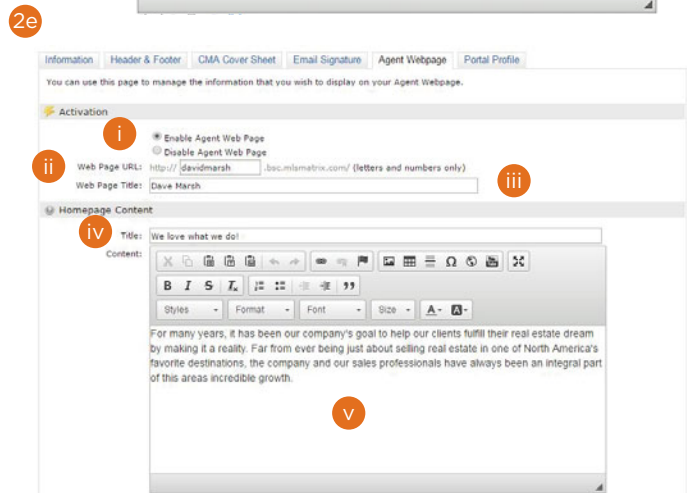
**2c CMA Cover Sheet:** manage how you would like your contact information to appear on a CMA cover page. Click on the, "Override" checkbox to override any associated pre-populated information then click, "Save".



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



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



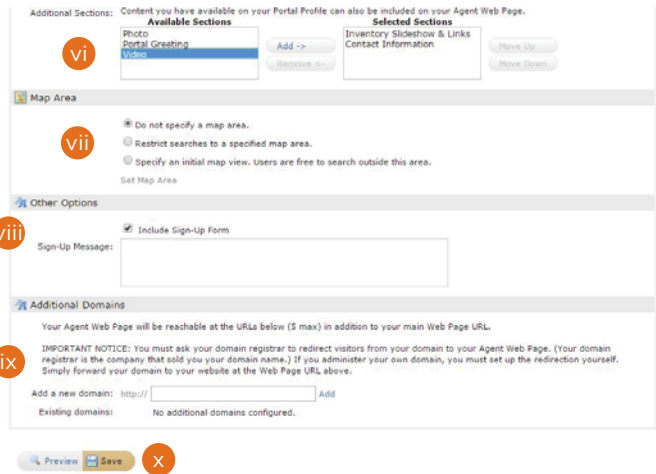
**Activation**

- i** Select the, "Enable Agent Web Page" radio button to activate your webpage and allow visitor access. Click the, "Disable Agent Web Page" option to prevent visitors from accessing your site.
- ii** The, "Web Page URL" is the address where visitors will find your site. You may update your name in the textbox provided (alpha numeric characters only. No spaces).  
**Note:** this is the URL that you will share with others (if you prefer to use your own domain name, see, "Additional Domains" below).
- iii** Add a, "Web Page Title" that will appear in the browser's tab.

**Homepage Content**

- iv** Add a, "Title" that will appear above the content on your website's "Welcome Page".
- v** Click inside this area and use the associated, "Rich Text Box" buttons to add, "Content" to your webpage.

- vi Select which profile information you would like to include from the, "Portal Profile" section.  
**Note:** for more information, see, "Portal Profile" under, "Settings" in the, "My Matrix" section.



**Map Area**

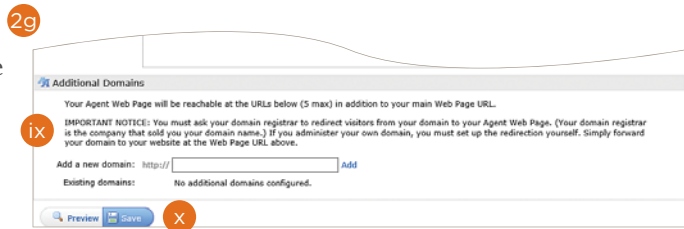
- vii Configure how the map should be used on your website.  
**Note:** for more information see, "Map Area" under, "Settings>IDX Configuration" in the, "My Matrix" section.

**Other Options**

- viii Select this checkbox if you would like to include a Sign-Up form for your website visitors then add an optional, "Sign-Up Message" (welcome or, perhaps, informational).  
**Note:** visitors who submit this form will appear in the, "Contact Requests" widget on the Matrix Homepage (see, "Contact Requests" under "Home Widgets" in the, "Home" section).

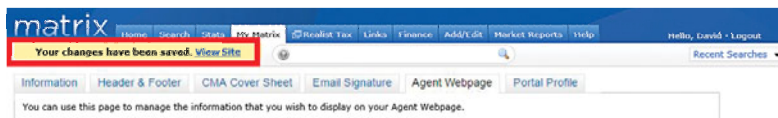
**Additional Domains**

- ix If you currently own a domain name and you would like to use it to replace the default, "Web Page URL" (see above) in the Address bar, simply add your domain in the textbox provided then click the, "Add" link.  
**Note:** you must ask your domain registrar to redirect visitors from your domain to your Agent Web Page (your domain registrar is the company that sold you your domain name). If you administer your own domain, you must set up the redirection yourself. Simply forward your domain to your website at the, "Web Page URL" (see above).



**Save**

- x Click, "Save" on the Button Bar to save your work and, if enabled, activate your website.  
**Note:** preview your site before going live by clicking the, "Preview" button.



## 2f Portal Profile

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

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

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

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

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

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

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

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

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

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

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

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

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

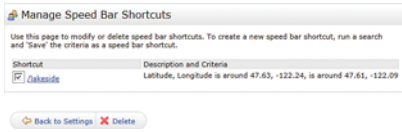
- viii Click the, "**Save**" button.

The screenshot shows the Matrix 7.0 Portal Profile page. The page is titled "Portal Profile" and contains several sections: Photo, About Me, Inventory Slideshow & Links, Video, and Contact Information. Annotations include: i (panel bar), ii (checkbox), iii (Photo panel), A (Change photo link), iv (About Me panel), v (Inventory Slideshow & Links panel), vi (Video panel), C (Share button), vii (Contact Information panel), and viii (Save button). A video player is shown with the title "Buying a House: 10 Things You Need To Know" and a URL "https://youtu.be/LxVFYuMwYuw".

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

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

**3** **Speed Bar Shortcuts:** manage existing Speed Bar shortcuts by clicking on your custom shortcut name.



**Note:** for more information, see, “Speed Bar Shortcut (Create)” in the, “Search” section.

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

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

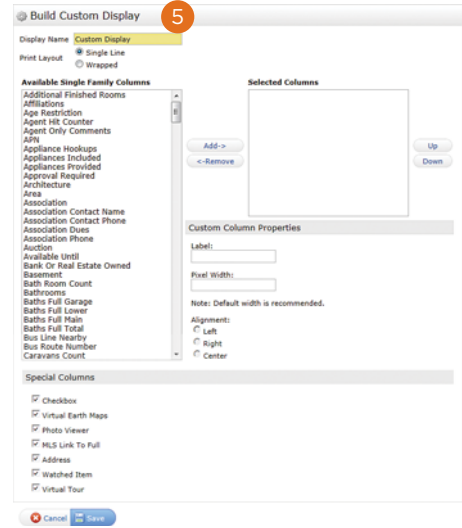
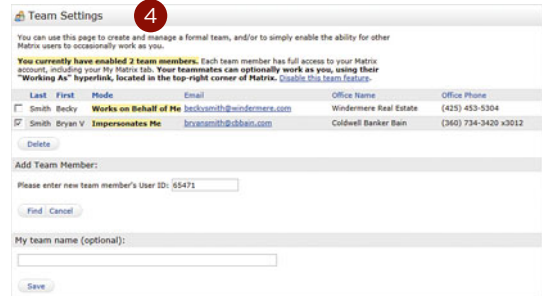
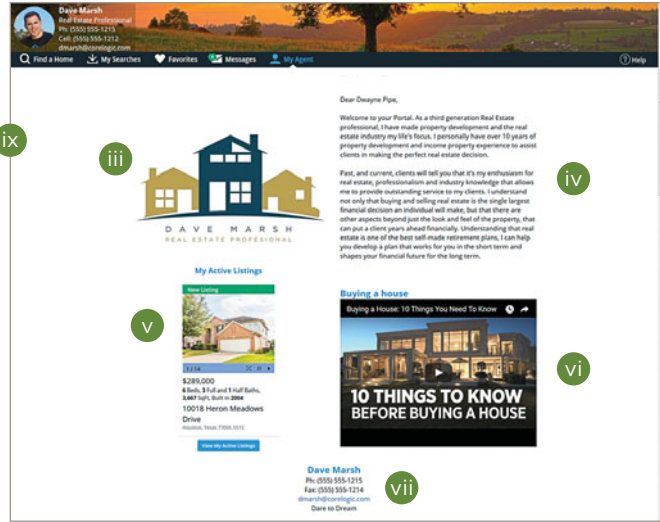


**Note:** team members may switch their identity by hovering, then selecting, their new one in the dropdown beside the, “Logout” link.

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

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

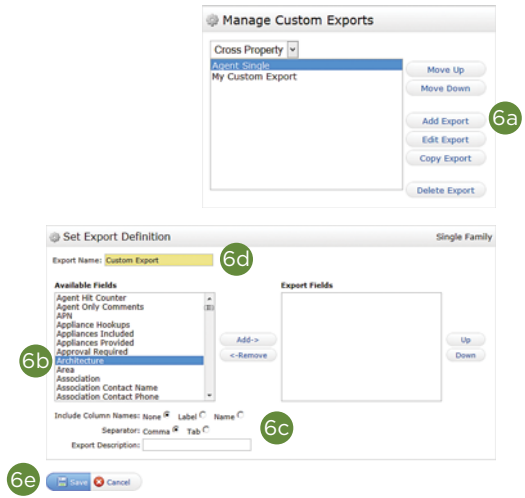
**Note:** view your custom display by selecting it from the, “Display” dropdown list on the, “Results” tab (see, “Search Results” in the, “Search” section).



**6 Custom Exports:** export specific fields from your selected listing(s) to a .csv file.

- 6a From the, "Manage Custom Exports" page, click the, "Add Export" button.
- 6b From the "Available Fields" listbox, select which field(s) you would like to export.
- 6c Identify each column in your .csv file by including the field name or label (optional).
- 6d Name your custom export.
- 6e Click, "Save"

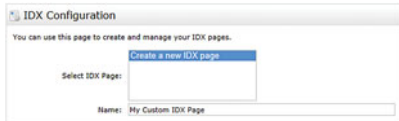
**Note:** non-printable columns, such as icons, cannot be exported  
**Note:** generate your custom export by selecting the listing(s) in your, "Search Results" then click, "Export" on the Button Bar (for more information, see, "Export" under, "Search > Results" in the, "Button Bar" section).



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

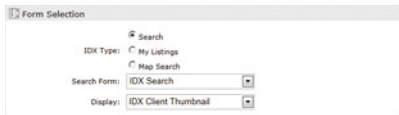
- 7a From the Matrix navigation menu, hover the, "My Matrix" tab and select, "Settings". From here, click on, "IDX Configuration".

- 7b From the **IDX Configuration** section, either select the name of an existing IDX page to manage or click, "Create a new IDX page" then add a unique name for the one you would like to create.

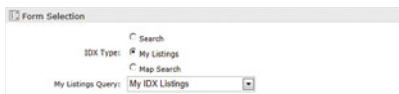


- 7c **Form Selection:** choose one of the following IDX forms to include on your website.

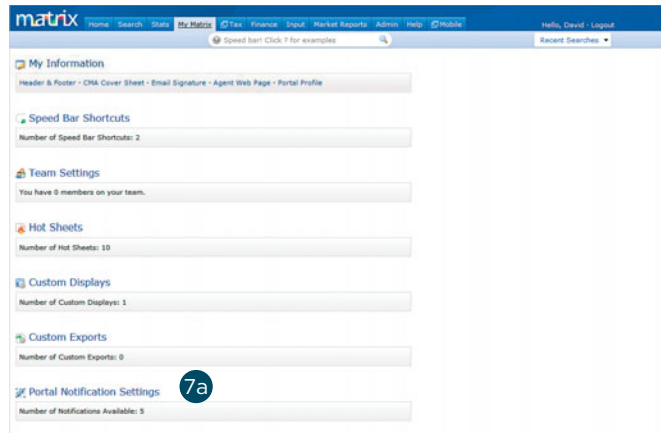
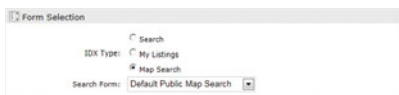
**Search:** select the, "Search" option then, from the, "Search Form" dropdown list, choose which Search Criteria form to display on your webpage. If available, select how you would like your results displayed by choosing from the, "Display" dropdown list.



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



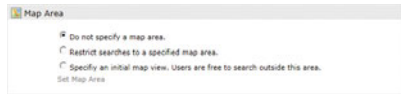
**Map Search:** select the, "Map Search" option then, from the, "Search Form" dropdown list, which Search Criteria form to display with the map.



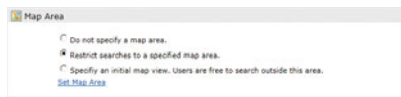
**7d Map Area:** when including a Map Search IDX on your webpage, specify if you would like to set any search area restrictions or an initial map view.

**Note:** the, “Map Area” section will appear only when the, “Map Search” option (in the, “Form Selection” section) is selected.

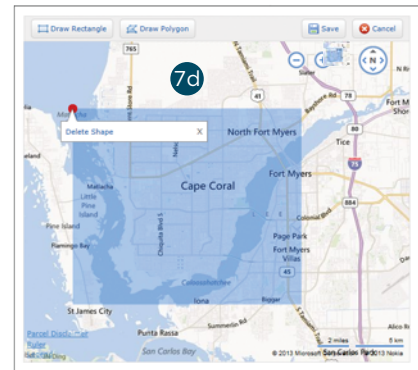
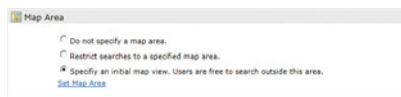
**Do not specify a map area:** select this option to remove any restrictions placed on where a user may search on the map.



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



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



**7e Activation:** activate, or disable, the IDX on your website.

**IDX Enabled:** display IDX on your webpage.

**IDX Disabled:** hide IDX from your webpage.

**HTML:** copy and paste the generated <iframe> directly into your webpage. If you’re unfamiliar with coding, simply create a webpage by saving the following example text as, “myidx.html” (be sure, however, to replace the <iframe> with the one that was generated in Matrix).

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

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

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



**7f Other Options:** offers additional IDX functionality depending on which IDX form is selected.

**Style:** when selecting, “Search” or, “My Listings” from the, “Form Selection” step, you are offered the following style options to help integrate the IDX with your website’s color scheme.

Click a box to select a color or enter the specific hexadecimal color code.

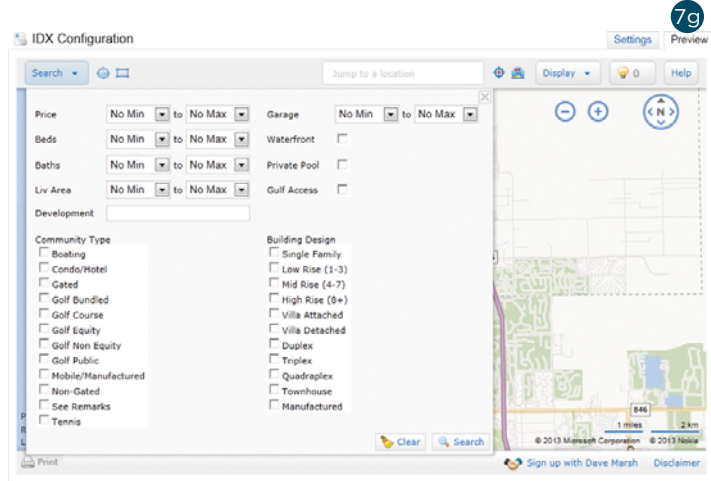


**Sign-Up Form:** when selecting, “Map Search” from the, “Form Selection” step, you are offered the option to allow users to sign up, from your website, as a new Matrix contact. Select the, “Include Sign-Up Form” checkbox then either use the default sign-up message or write one of your own.



**7g** Click the, “**Preview**” tab to display how your Search, Listings or Map IDX will appear on your webpage.

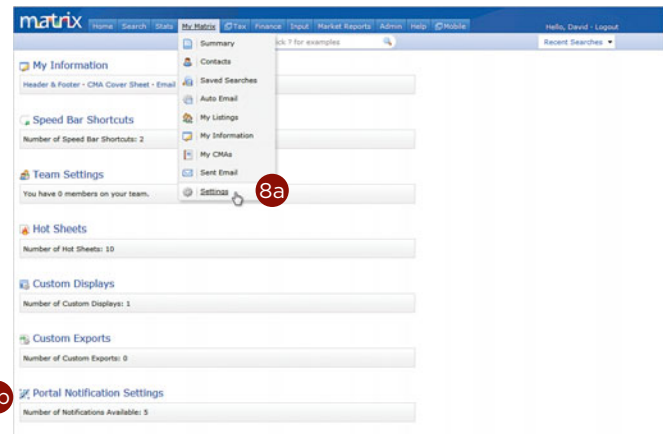
**7h** Use the **Button Bar** to delete the current IDX or click, “Save” to create a brand new one.



**8 Portal Notification Settings**

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

**8b** Click the, “**Portal Notification Settings**” link to set how, and when, you would like to receive Client Portal notifications.



**Configure Notification Settings**

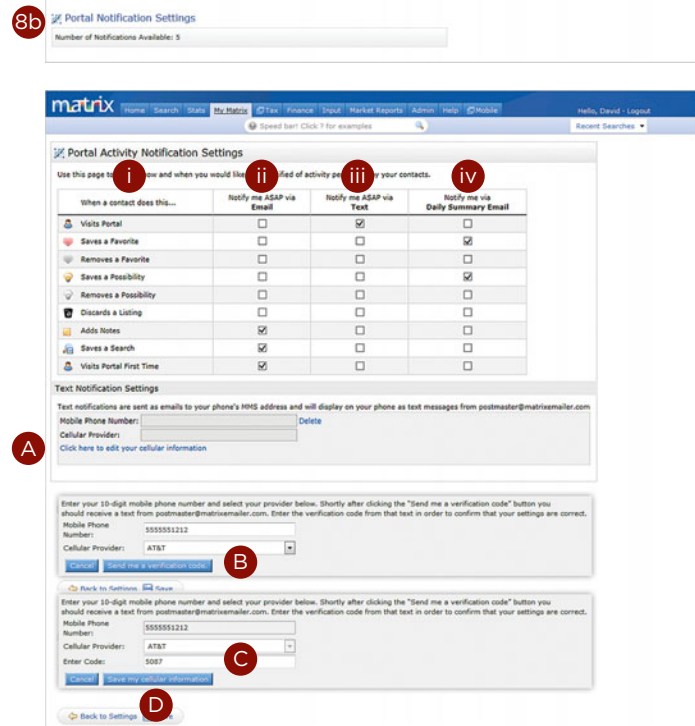
**i** **When a contact does this:** the action take by the Client in their Portal Options: Visits Portal, Saves a favorite, Adds Notes, Saves a Search, Visits Portal First Time.

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

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

**A** Click the, “**Click here to edit your cellular information**” link to add/edit your phone number and to select your cellular provider.

**B** Once your phone details have been entered, click the, “**Send me a verification code**” button.



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



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

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

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

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

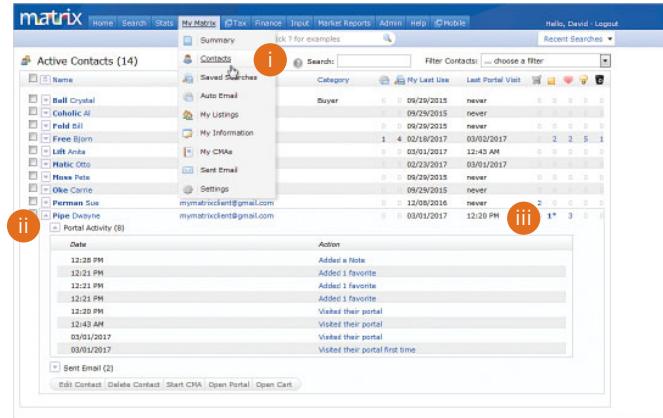
### View Client Activity

- i** From the Matrix top menu, hover over the, **"My Matrix"** option then click, **"Contacts"**.

- ii** Expand a Contact to **view**.

- iii** Click the associated **number** link.

**Note:** an asterisk (\*) beside the number of Notes indicates unread Note(s).



# Stats

## Stats (Preset)

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

2 Select the, “Presets” tab.

3 Click a **Preset** statistic link.

4 Select criteria from the, “Search” tab.

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

5 Click the, “Expand”  icon to, “Save a Copy” of this Preset (optional).

**Note:** a “Copy of” Preset will appear under the, “My Presets” heading.

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

6 Click, “Generate”.

## Stats (Customize)

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

2 Select the, “Customize” tab.

3 Select a, “Time Frame” from the dropdown list.

4 Select a, “Statistic” from the dropdown list.

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

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

6 Select a, “Group By” item from the dropdown list.

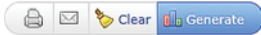
**Note:** you must first select a statistic before the, “Secondary Statistic” dropdown box appears.

7 Add a, “Chart Style” (optional).

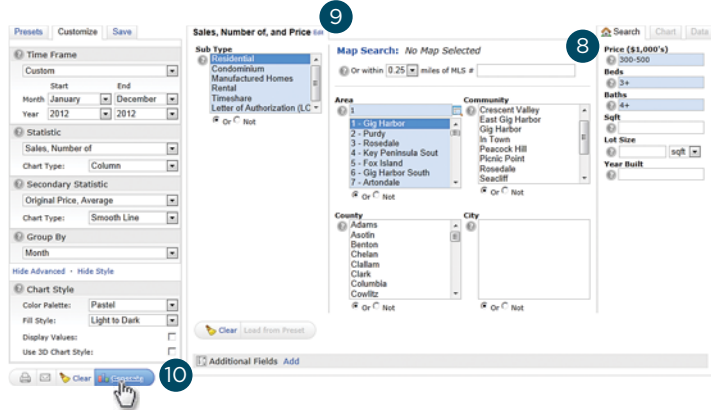
- 8 Select criteria from the, “Search” tab.  
**Note:** when running a regular search (see, “Criteria Search” in the, “Search” section), click, “Stats” on the Button Bar for a quick way of viewing statistics using criteria that you have already created.

- 9 Give your statistic a Name (optional).

- 10 Click, “Generate”.



**Note:** use Button Bar to print/email statistics as well as clear custom settings.



### Stats (Save)

- 1 After choosing a Preset or a Customized stat, select the, “Save” tab.

- 2 Give your statistic a, “Name” (optional).

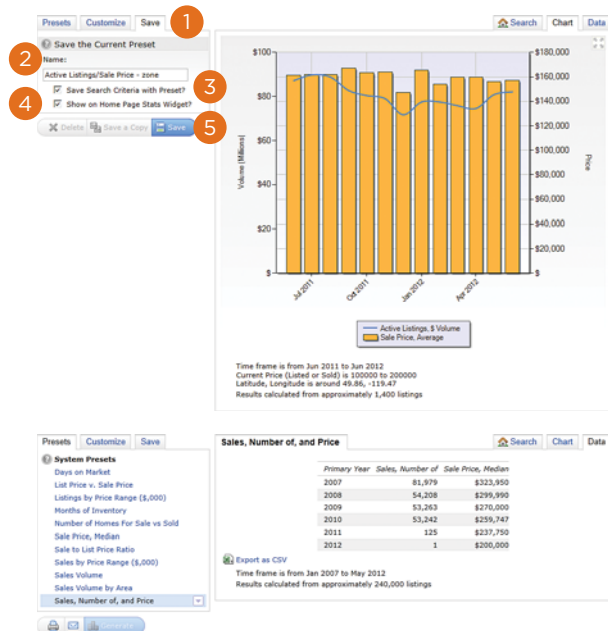
- 3 Check, “Save Search Criteria with Preset” to save the statistic(s) and the criteria together (optional).

**Note:** when clicking this from, “My Presets” on the, “Presets” tab, you will have the option of running this with, or without, the saved criteria.

- 4 Check, “Show on Home Page Stats Widget” to save this statistic for quick access on the Home Page Stats Widget (optional).

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

- 5 Click, “Save”.



**Sales, Number of, and Price**

Primary Year	Sales	Number of	Sale Price, Median
2007	81,979		\$323,950
2008	54,208		\$299,999
2009	53,263		\$270,000
2010	53,242		\$259,747
2011	125		\$237,750
2012	1		\$200,000

Export as CSV  
 Time frame is from Jan 2007 to May 2012  
 Results calculated from approximately 240,000 listings

# Auto Email

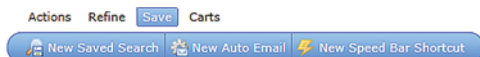
## Auto Email (Create)

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



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

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



- 3 **Recipients**

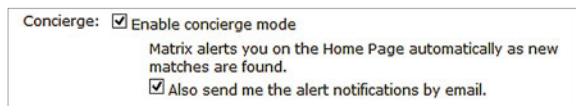
- 3a Select a, "**Contact**" from the dropdown list (mandatory).  
**Note:** click the, "Create a New Contact" link to add a contact not yet in your address book.
- 3b Select, "BCC" to be notified when your customer is sent a new Auto Email.

- 4 **Messages**

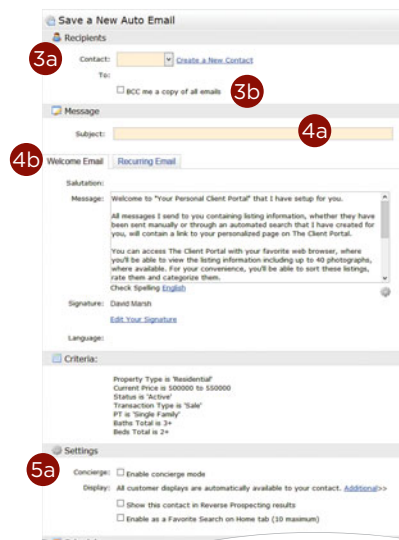
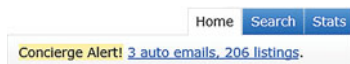
- 4a Enter a Subject line (mandatory).
- 4b Use the default, "**Welcome Email**" and, "**Recurring Email**" or customize the text to create your own messages.  
**Note:** click the, "Settings" icon to either set your custom message as the new default or to reset it back to the system default.

- 5 **Settings**

- 5a An Auto Email, by default, automatically sends a client new, or updated, listings at whatever interval is selected in the, "Schedule" option.  
Enable, "Concierge Mode" if you would prefer to review (approve or reject) each listing first before they are sent to the client (optional).  
**Note:** when Concierge is enabled, click the, "Also send me the alert notifications by email" option to be notified, by email, that there are listings waiting for your approval in Matrix.



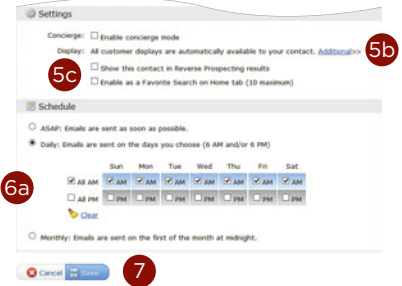
**Note:** Matrix also alerts you of any new matches in the, "Concierge" Widget on the Homepage (see, "Concierge" under, "Home Widgets" in the, "Home" section for more information" as well as on each page, in the information bar, located just below the menu tabs.



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

**5c** Click the, "Reverse Prospecting" checkbox to allow listing agents to view when their listing has been sent to this customer.

**Note:** this feature can also be enabled in the contact's management area (see, "Contacts (Add) in the, "My Matrix" section).



**6 Schedule**

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

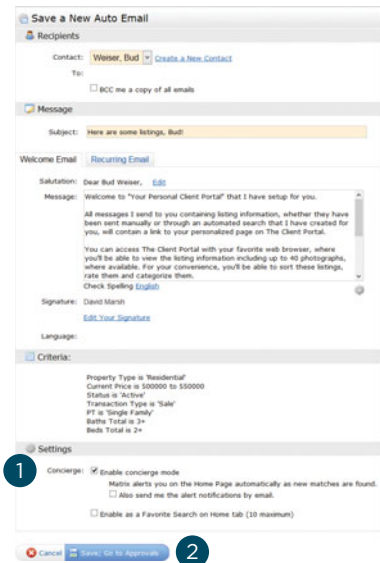
**Daily:** Emails are sent during the days, and time period, selected.

**Monthly:** Emails are sent on the first day of the month.

**Note:** Auto Emails that are not read within a system-specified period of time are automatically suspended until re-enabled by the agent.

**7** Click, "Save" to create this Auto Email.

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



**Concierge Mode**

**1** Click checkbox to enable, "Concierge" Mode.

**Note:** when Concierge Mode is enabled, you are no longer able to, "Schedule" when Auto Emails are sent.

**Note:** notification of new listings waiting for approval can be found in the, "Concierge" widget located on the Home Page as well as to the left of the, "Speed Bar" textbox on each page.

**Note:** click the, "Also send me the alert notifications by email" checkbox if you would like to also be notified by email of new listings waiting for approval.

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

**3** View if/when a listing has already been sent.

**Note:** listings that have never been emailed to this client display, "Never" while listings that have will display their date sent.

**4** Select/deselect single, or multiple, listings to send.

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

**5** Click, "Approve Selected" on the Button Bar.

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



# Button Bar

## Button Bar

### 1 Search > Criteria


- Clear:** removes all current search criteria.
- Count-on-the-fly:** displays a real-time number of matches based on the current search criteria.
- Map:** switches view to map and displays listings based on the current search criteria.
- Search:** switches view to results and displays listings based on the current search criteria.

### 2 Search > Results and Search > Map

#### 2a Action Tab

- Criteria:** return to the, "Criteria" tab.
- Email:** email the selected listings.
- Print:** print the selected listings or create a .pdf.
- CMA:** use the selected listings as comparables in a CMA.
- Directions:** create custom, turn-by-turn driving directions using the selected listings.
- Stats:** quickly create chart stats using the selected search criteria.
- Export:** export your selected listings as a .csv file using System defined or Custom fields (for more information, see, "Custom Exports" in the, "My Matrix" section).

#### 2b Refine Tab

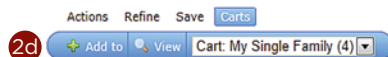
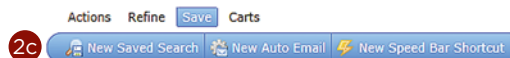
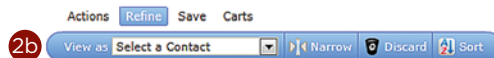
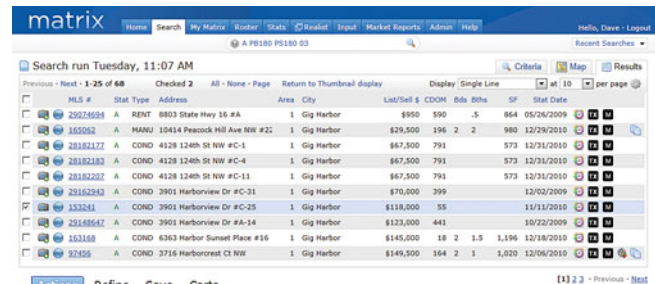
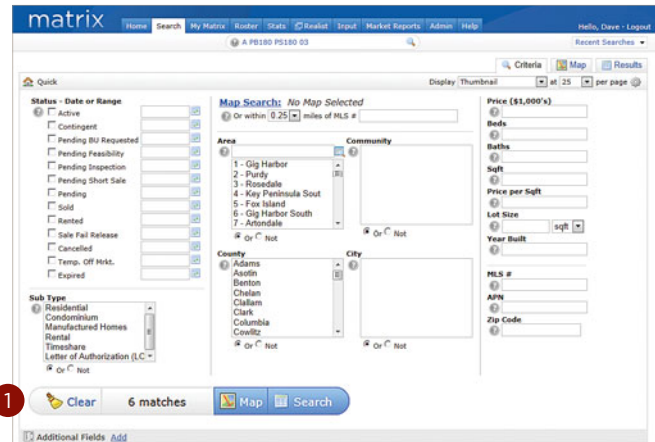
- View as:** select a name from the dropdown list to display which listings, if any, have already been sent to that particular contact.
- Narrow:** displays only selected listings (click the, "Original Results" breadcrumb link (located beneath the Speed Bar) to return all listings).
- Discard:** removes selected listings (click  to undo this action).
- Sort:** sort listings by field order (unavailable on Map tab).

#### 2c Save Tab

- New Saved Search:** save your search criteria to use again for a general search, or for a specific contact. You may also include your search as a favorite on the, "My Favorite Searches" Home Page widget. Access all saved searches under, "My Matrix > Saved Searches").
- New Auto Email:** automatically send listings, based on selected search criteria, to a specific prospect at scheduled times.
- New Speed Bar Shortcut:** create a custom Speed Bar shortcut, based on selected search criteria, to use for quick search results.

#### 2d Carts Tab

- Add to:** add selected listing(s) to cart displayed in the dropdown list.
- View:** view the listing(s) of the cart displayed in the dropdown list.



## Button Bar

### 1 My Matrix > Contacts

#### 1a Add/Inactivate/Delete

**Add:** add a new contact.

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

**Delete:** permanently delete selected contact(s) and their history.

#### 1b Show/Import/Export

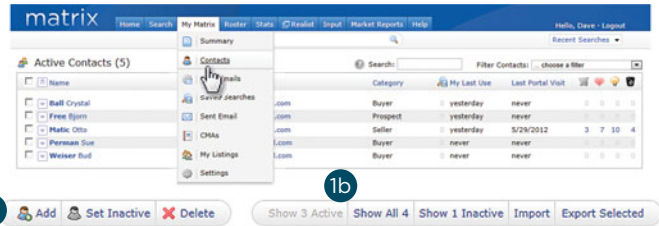
**Show (X) Active:** display only active contacts (disabled when already viewing active).

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

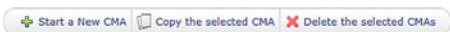
**Show (X) Inactive:** display only inactive contacts (disabled when already viewing inactive or when there are no inactive).

**Import:** import a contact .csv file created with Matrix Contact Export.

**Export:** export selected contact(s) to a .csv file.



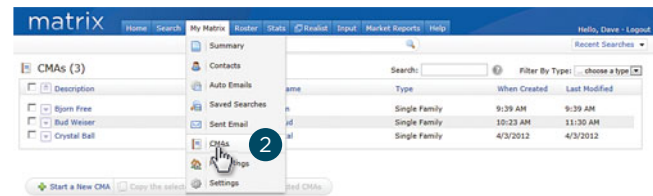
### 2 My Matrix > CMA



**Start a New CMA:** create a brand new CMA.

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

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



### 3 My Matrix > My Listings

**Note:** select a listing to enable Button Bar functionality.

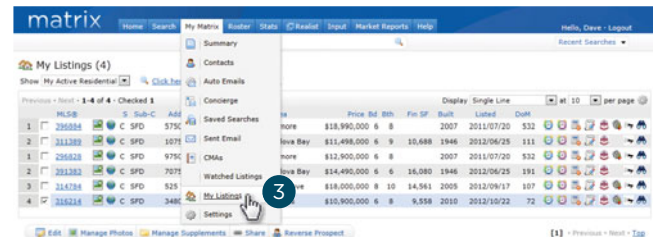


**3a Edit:** edit the selected listing (see, "Listing (Edit Existing)" in the, "Input" section for more information).

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

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

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



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

**Reverse Prospect Results for 316214**

These agents each have a contact who has received this listing. Click the agent name to email them about your listing. They can identify the contact via the reference # by looking it up on their Contacts page. Count is the total number of listings each contact has been sent.

3480 South Highland Avenue

Agent	Ref #	Pre-approved?	Count	Date Sent			
Carla Palacios	24595		31	yesterday	agent01@gmail.com	Johnson Brokerage, LLC	(555) 261-5555
Anthony Sibio	98853		73	yesterday	agent02@aol.com	Coldwell Banker Res Brokerage	(555) 555-2970
Carla Palacios	24044		89	yesterday	agent03@gmail.com	Hancock Brokerage, LLC	(555) 555-4502
Marc Ann Mancini	50544	✓	169	yesterday	agent04@yahoo.com	Grand Realty	(555) 555-4350
Carla Palacios	<b>23974</b>		271	yesterday	agent05@mysafv.com	Chesterman Brokerage, LLC	(555) 555-4502
Yolanda Gomez	02409	✓	329	Tuesday	agent06@yahoo.com	Newage Homes Realty	(555) 555-8775

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

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

**Active Contacts (14)**

Name	Email	Category	My Last Use	Last Portal Visit		Ref#
Ball Crystal	mymatrixclient@gmail.com		02/18/2014	never		29594
Coholic Al	mymatrixclient@gmail.com		02/18/2014	never		
Feld Bill	mymatrixclient@gmail.com		02/18/2014	never		
Free Bjorn	mymatrixclient@gmail.com		03/14/2014	12:49 PM		<b>23974</b>
Litt Ante	mymatrixclient@gmail.com		02/18/2014	never		

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




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

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

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

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

**File Folder Icons:**

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



# Input

## Listing (Add New)

- 1 From the Matrix navigation menu, click the, “Input” tab.
- 2 Click the, “Add new” link.
- 3 Choose the appropriate **Property Type** form.
- 4 Choose **how to fill** the Property form.

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

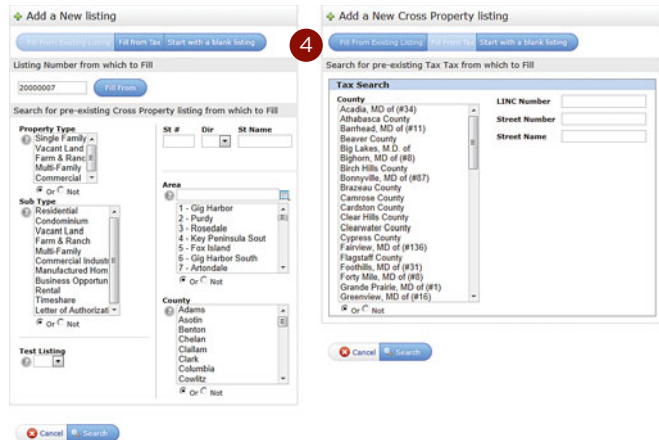
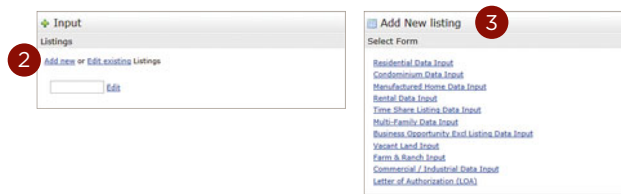
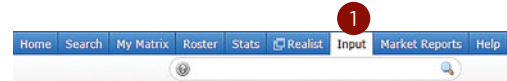
Fill From Existing Listing   Fill from Tax   Start with a blank listing

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

Fill From Existing Listing   Fill From Tax   Start with a blank listing

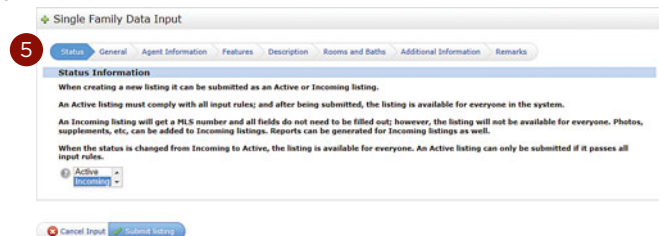
**Start with a blank listing:** fill the form beginning with empty fields.

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



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

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




**6 Map your listing.**

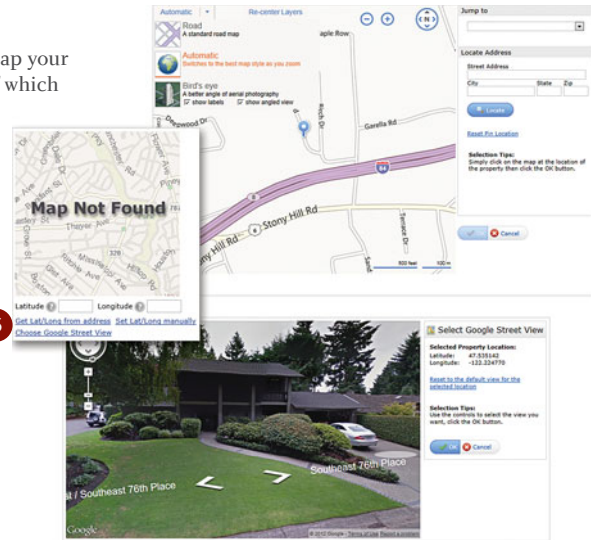
Located under the, “General” (or similar) section of the Input Wizard, map your listing by clicking one of the pin placement options. **Note:** regardless of which option you choose, always visually verify that the map pin is placed directly over where your listing is located (see, “Manually” below).

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

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

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

**Google Street View:** click the, “Choose Google Street View” (or similar) link then, after the map pop-up displays, use the Google Map directional arrows to choose the best view of your listing. Click, “OK”.

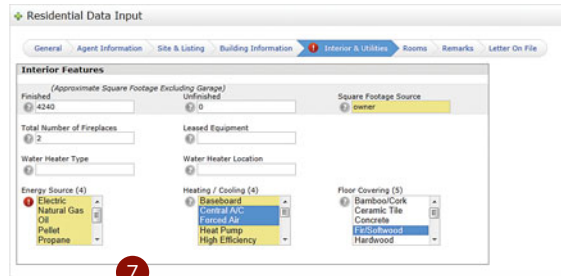


**7 Click, “Validate”, on the Button Bar, to ensure all required fields have been filled.**

**Note:** If any errors exist (such as, empty required fields), they will be indicated by an, “Alert” icon  in the, “Input Wizard”. To resolve, simply click the offending step and correct the error.

**Note:** for additional error information, click the error message link to view a detailed summary of specific listing errors.

[There were errors on the input form, click here to view them.](#)



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



**Photos and Supplements (Add New)**

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

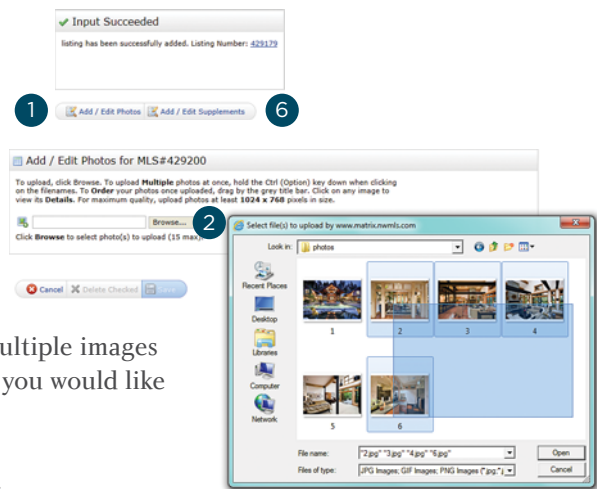
**1 From the Button Bar, click, “Add/Edit Photos” to add listing photos.**



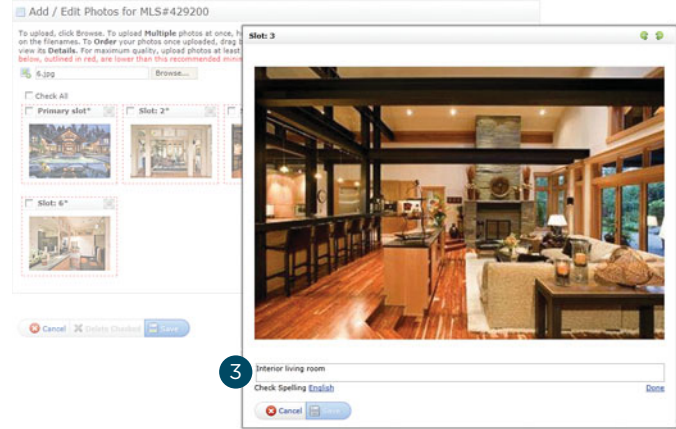
**2 Click the, “Browse” button to locate the listing photos on your hard drive then drag your cursor over multiple images (or CTRL and click individual images) to select the ones you would like to upload.**

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

**Note:** for best quality, upload photos that are at least 1024x768 pixels.



- 3 Once listing photos have uploaded, click any thumbnail to enlarge the image and add a **photo description** (optional). Click the, “Done” link when finished, followed by, “Save” on the Button Bar.  
**Note:** thumbnails outlined in red indicate the image dimensions are smaller than recommended.

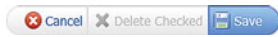


- 4 Click and drag the thumbnail, “Slot: [#]\*” to **reorder** the photos as you would like them to appear in the listing.



**Note:** the, “Primary slot” indicates which image will display as the Primary photo on the listing.

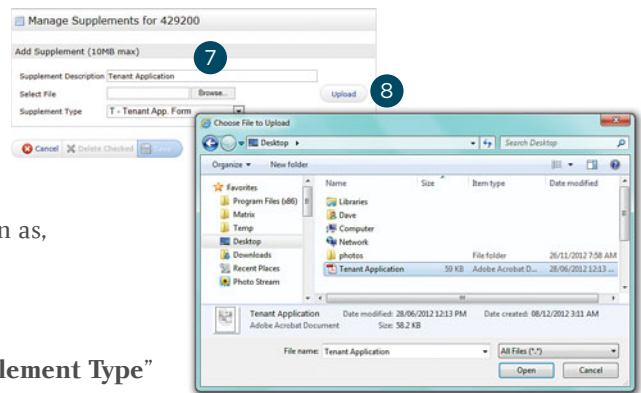
- 5 Click, “**Saved**” when complete.



- 6 From the Button Bar, click, “**Add/Edit Supplements**” to add listing supplements (also known as, “Attachments”).

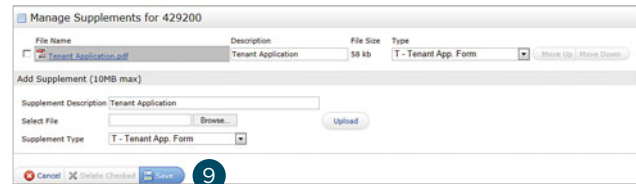


- 7 Enter a, “**Supplement Description**”, choose a, “**Supplement Type**” then click the, “Browse” button to locate the listing supplement on your hard drive.



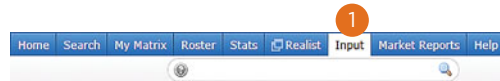
- 8 Click the, “**Upload**” button to upload this supplement to the listing.

- 9 Click, “**Save**” when complete.

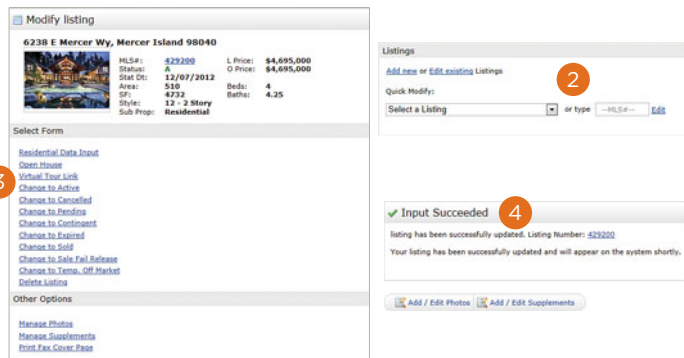


### Listing (Edit Existing)

- 1 From the Matrix navigation menu, select the, “**Input**” tab.



- 2 **Choose a listing to edit** either by clicking the, “Edit existing” link, by selecting a listing from the dropdown list or by entering a listing number in the textbox.



- 3 Select which **part of the listing to edit**.  
**Note:** click the Property Type link (i.e. Residential, Commercial etc.) to edit any of the fields from the listing.  
**Note:** click the, “Manage Photos” link to update listing photos.  
**Note:** click the, “Manage Supplements” link to update listing supplements.

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



## Auto Save

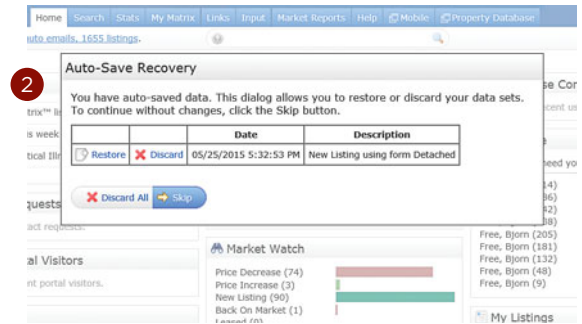
- 1 Matrix automatically **saves new listings** after several minutes if:
  - a. no keyboard input is detected
  - b. you navigate away from the Input screen
  - c. you switch between Input wizard sections

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

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

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

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



# Matrix Mobile

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

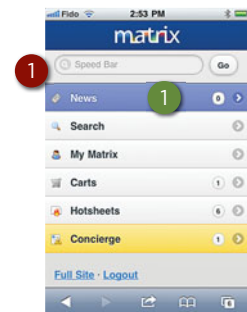
**Note:** custom settings from the desktop version of Matrix are automatically transferred to Matrix Mobile.

Use the following icons to navigate through the sections:

- |   |   |
|---|---|
|  Home Page |  Next Item     |
|  Last Page |  Previous Item |

- To access Matrix Mobile, navigate to the Matrix Mobile **Login** page then enter your, "User ID" and "Password".

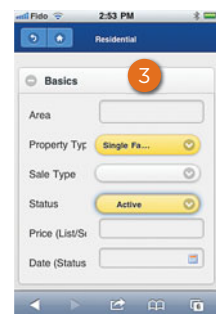
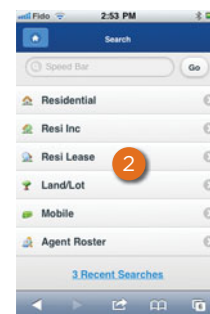
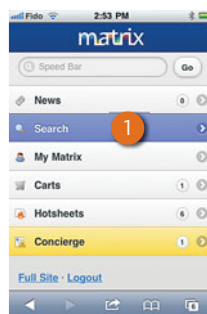
**Note:** click the, "Matrix Desktop" link to access additional Matrix features and functionality from the full version of Matrix.



## Speed Bar

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

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



## News

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

## Search

- From the Home Page, select, "Search" to enter search criteria for a variety of property types.
- Select a **Property Type** to search.  
**Note:** click the, "Recent Searches" link, at the bottom of the page, to view a list of your most recent searches.
- Enter your **Search Criteria**, scroll to the bottom of the page and click the, "Search" button.

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

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

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

- 4 Click the, “**Email All**” link to send all listings to one, or more, recipients.

**Note:** separate email addresses, in the, “To” textbox, with a comma.

**Note:** enter a mandatory email subject line.

- 5 Click the, “**Map**” icon link to view all listing results on the map.

**Note:** by default, only results of less than 100 listings will display on the map.

**Note:** on the map, click the, “down” arrow to reveal map display options.

**Note:** on the map, click a listing pin to view the listing details.

- 6 Select a listing to view the listing details and functions.

- 7 Click a listing function.

**Email:** click the, “Email” button to email this listing to one, or more, recipients.

**Cart:** click the, “Cart” button to add this listing to a cart.

**Map:** click the, “Map” button to view where the listing (identified by the large icon) is located on a map.

- 8 Click the primary, “**Listing Photo**” to display all listing images.



## My Matrix

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

- 2 From the, “My Matrix” page, click, “**Contacts**” to view a contact’s details (including, saved “Auto Emails”, “Saved Searches” and client portal preferences).

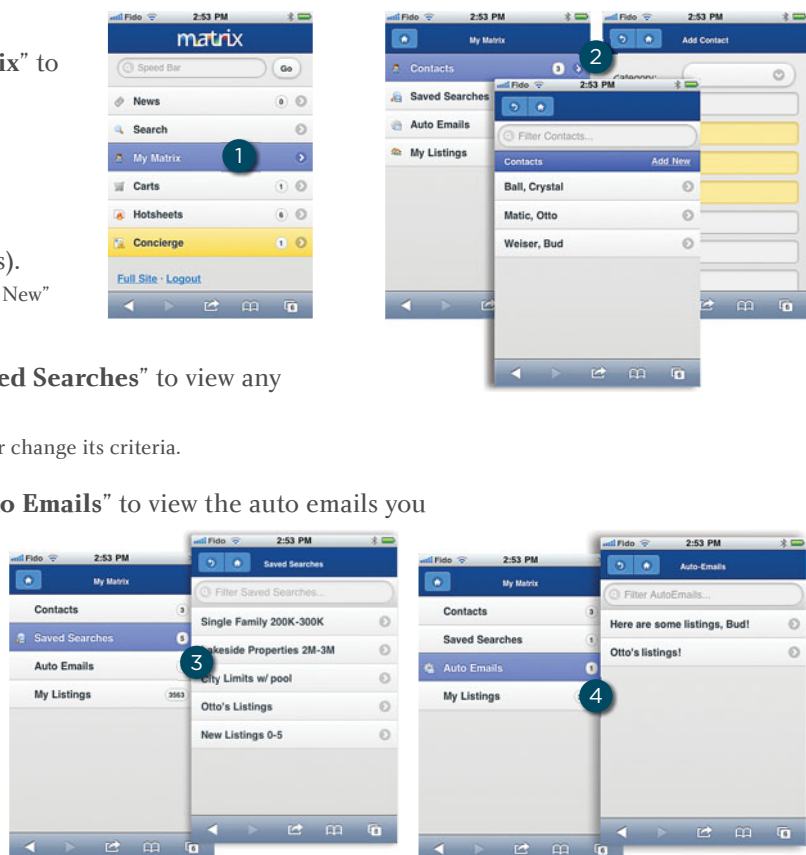
**Note:** from the, “Contacts” page, click the, “Add New” link to add a new contact.

- 3 From the, “My Matrix” page, click, “**Saved Searches**” to view any saved searches.

**Note:** select a saved search to view the results or change its criteria.

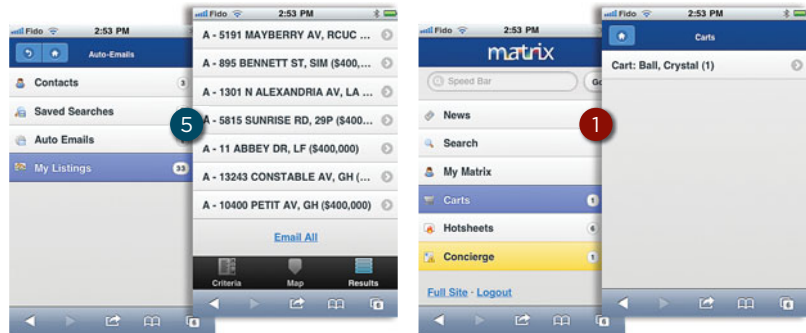
- 4 From the, “My Matrix” page, click, “**Auto Emails**” to view the auto emails you have created.

**Note:** select an auto email to view the results, change the criteria or display the new listings since the last time you ran this search.



- From the, “My Matrix” page, click, “**My Listings**” to view your listings.

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



## Carts

- From the Home Page, select, “**Carts**” to view a list of all current carts.

**Note:** a cart is automatically created each time a new contact is added to the system.

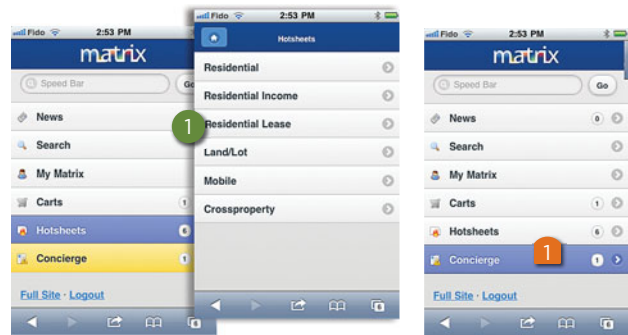
**Note:** see #7, under, “Search” in the Matrix Mobile section, to add a listing to a cart.

## Hotshots

- From the Home Page, select, “**Hotshots**” to view the Hotshot for each property type.

**Note:** a customized Hotshot can only be created from within Matrix.

**Note:** see #3, under, “My Matrix” in the Matrix Mobile section, to access a Hotshot that you may have saved as a custom saved search.



## Concierge

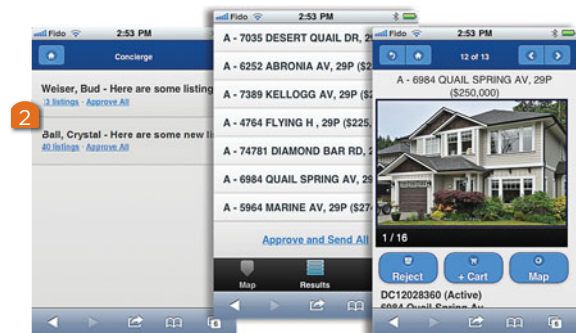
- From the Home Page, select, “**Concierge**” to view all auto emails with listings waiting for your approval.

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

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

**Note:** to reject a specific listing, select the listing then click the, “Reject” button.

**Note:** once all rejected listings have been discarded, click the, “Approve and Send All” link to send all remaining listings to your Auto Email recipient.



FOR MORE INFORMATION PLEASE VISIT  
**[CORELOGIC.COM/MATRIXHELP](https://corelogic.com/matrixhelp)**

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