1. GETTING TO MATRIX

Go to MATRIX from a desktop/laptop/tablet device – www.grar.org

2. MOBILE DEVICE USE

Tablets default to the desktop version. Most phones default to the mobile version. On either, the user can switch to the other version. When on the desktop/full version, there is a blue tab on the right of all the tabs up top that says "mobile". This takes you to the mobile version if your phone is not taking you there.

Desktop Version of MATRIX – Mobile tab takes you to the mobile version   Mobile Version – link to Full version
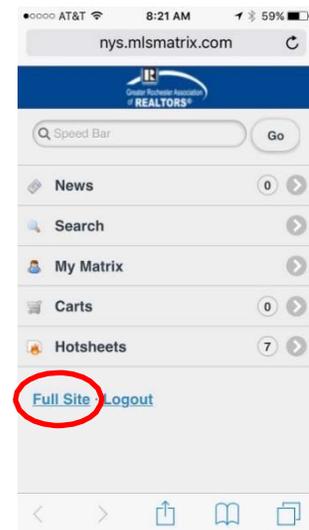
From the mobile version Home Page, you can switch to the full site.

3. SPEED BAR SEARCH

The Speed Bar is intended for quick searches. See the **Speed Bar Tips Tech Tip** or click on ? in the Speed Bar

4. IDENTITY SHARING FOR TEAMS/TEAM SETTINGS

You can use this feature to create and manage a formal team, and/or to simply enable the ability for other Matrix users to occasionally work as you (if you are away or have an illness). To set up:

o   Go to **My Matrix** (up top)
o   **Settings**
o   **Team Settings**
o   **Click here to create a team** (you will need each of their IDs)

Once you've done that, the Member who has been allowed that permission can click on their "**Hello, (Name)**" in the top right. All the shared ID's they can assume will appear there and they just click on it. When they click on it, it will read "**Switch to – (Agent 1)**" or "**Switch to – (Agent 2)**" (if there's more than 1 person whose sharing). See the **Team Function/Identity Sharing** and **Team Function Details** Tech Tips for more details.

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5. LISTINGS

o **How many days incomplete?** You may keep a listing in Incomplete status for up to 21 days as you collect info. N o t e - **A listing must be added into MLS as Active within 24 hours of ERS being signed.**

o **Number of Photos**. You must add at least one of the front of property and may include up to 50 total per listing. One exception is when a property is on the water, sometimes the view of the property from the water is considered the front of the structure and may be used in that case (not a view of the water).

o **Copying a Listing**: Can one copy a listing when relisting a property? Yes, when it belongs to the same agent.
  - o Go to **Add/Edit**
  - o Click on **Add/new**
  - o Select a **Property Type**
  - o Instead of **Fill from Realist**, select the second option which is **Copy from Existing Listing**.
  - o Enter the **MLS#** and click on **Fill From** or search for the property, select it and then click on **Fill**.

  Tip – if you wish to copy photos from the existing (prior) listing, you must do so before adding any new photos. Once new photos are added, you will no longer have the option of copying them from a prior listing.

o **Copying Photos:** Can one add/copy photos from previous listing when relisting a property? Yes, when it belongs to the same agent. This will only display as an option when there are no photos currently on the listing. Once you add photos manually, you will not be able to copy prior listing photos. You can access this from **Add/Edit**, just like you would when editing a listing. You will need to know the MLS# of the listing you wish to import images from.
  - o After clicking on **Add/Edit** or **Edit listing** and entering the listing number, click on **Manage Photos**.
  - o Click on '**Click here to import photos from another listing'**
  - o Enter the **MLS#** that you will to copy the photos from and then click on **Import Photos**
    Note you can only copy photos from your own prior listings. Don't forget to **Save** when you are done!

o **Adding a Listing and adding photos/supplements before making active**: Just save your listing as Incomplete, add the photos and supplements, and then go back and make Active.

6. PHOTOS AND ATTACHEMENTS/SUPPLEMENTS

Photos

o Matrix can hold a maximum of 50 photos per listing

o For maximum quality, photos should be at least 1024x768 pixels in size

o If a photo is uploaded in a different resolution ratio (than 4:3), Matrix will auto-fit by adding padding (white space) to either the top & bottom or the left & right sides of photo.

Attachments

o Matrix can hold a maximum of 15 attachments per listing; Each attachment can be up to 10 MB

o Listing attachments can be PDF, DOC, or TXT formats

o When you add a supplement/attachment to Matrix for a listing, there is a way to denote that a supplement is 'Public' (scroll down in the list of Supplement types) so that it will appear via a Customer Full and any other Client Facing report in the Client Portal when sent to members.

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Adding and Editing Photos

o   Go to **Add/Edit** and then enter ML# to edit.

o   To upload, click **Browse.**

o   To upload **Multiple** photos at once, hold the Ctrl (Option) key down when clicking on the filenames.

o   To **change the order** of your photos once uploaded, drag by the grey title bar.

o   There's an option in the bottom left hand corner to add a **Description** when adding/editing a photo.

o   Click on any image to view its **Details**.

7. SEARCHING TIPS

o   **Home Page Search -** This is meant to be a quick search and, as such, will not have all fields.

o   **Searching by Price -** The price field will show the **List Price if the listing is Active, Continue to Show, Under Contract, Expired, Withdrawn or Pending** or the **Closed Price if the listing is Sold** – even when searching both A and S listings together in the same search.

>   o   Ex. If you enter $500+ in the price field, and search both A and S status, the results will be Active listings with LP=500+ and sold listing with SP=500+.

o   **Searching Bathrooms -** To find properties with at least 1 ½ bathrooms, you must search in the Total Bathrooms field for 1.1+ (More than 1 Full and 1 Half baths. Ex. Results will be 1 ½, 2 Full or more baths).

o   **No Required Fields -** There are no required search fields in Matrix. You may search using as many or as few fields as you'd like.

o   **Multi-column Sort -** To sort by a certain column, just click on the header. To sort by multiple columns, click on **Refine** (under your search results), then click the **Sort** button.

o   **Search Symbols -**   Search symbols such as + - = * or ! may be used in Matrix as follows:

>   o   **List Price/Bedrooms/Bathrooms, etc.:** Enter a specific amount, a range or use the +, -, to indicate greater than or less than values. Do not include commas in your criteria.
>   **EXAMPLES**: Enter 100 for exactly 100. Enter 100-150 for a range. 100+ for more than 100 and 100- for less than 100. Notice there is a checkbox that when checked assumes you are searching in the 1000's.

>   o   **Wild Card Search**: To get all results that include a word or a portion of a word in the street name, for example, use the asterisk (*) as a wild card.
>   **EXAMPLE 1**: If you are searching for properties on Riverview Drive, type **Riverview*** in the search criteria text box. You will find listings whether the listing was entered as Riverview Drive, Riverview Dr, or Riverview Dr.

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EXAMPLE 2: To search for a property on South Lake Rd, the following is an example of how to use the wild card (*) to ensure you get all possible results.

St#	St Pre Dir	St Name	St Type	St Post Dir	Unit #
	Sou ▽	lake*	▽	▽	
	▽	*s* *lake*	▽	▽	

- o **To Exclude**: The exclamation point (!) is the operator to use to exclude something from your search.
  EXAMPLE: To search for properties with the word "Lake" in the street name, **except for** properties on "Lakeshore" and "Lake Shore", enter the following string into a **single** Street Name field:

  Ex. Lake*, !Lakeshore, !Lake Shore (capital letters not necessary)

St#	St Pre Dir	St Name	St Type	St Post Dir	Unit #
	▽	lake*, !lakeshor	▽	▽	

- o **Selecting more than one item in a list:** To select more than one item, hold down the **CTRL** key on the keyboard while clicking on the desired items with your mouse. To remove a selected item, hold down the **CTRL** key on the keyboard while clicking with your mouse and the item will deselect. Note some fields will allow a once, twice, thrice approach to denote that you want a match (once will show a green checkmark for yes), or you don't (twice will show a red X for not wanted) and thrice will clear the field.

  ☑ Fully Fenced Yard
  ☐ Garage Door Opener
  ☐ High Speed Internet
  ☐ Hot Tub
  ☐ Lawn Sprinkler System
  ☐ Other - See Remarks
  ☐ Partially Fenced Yard
  ☐ Patio
  ☐ Permits Available
  ☐ Playset / Swingset
  ☒ Pool-Above Ground
  ☒ Pool-In Ground

- o **How to SELECT ALL:** List boxes do not have an "ALL" selection. If you want all values in a list box for your search**, leave them all unselected**. Matrix assumes you want all values in your search, unless you specifically click to select certain values (thereby excluding those not selected).
  - o For example, if you do not make a selection for Status, Matrix will return all statuses in your search. If you click to highlight "Active" but leave all other statuses un-highlighted, Matrix will only return Active listings.
  - o If you have already selected a value but really want "ALL", then hold down the **CTRL** key and click on the selected value to deselect it. When ALL items are selected, the background of the select box will be white. If one or more items are selected, the background is light blue.

- o **Multiple Tabs Feature:** Matrix does not have this feature but you can use browser features to do it. Just '**right click**' on the Search or any tab in Matrix and then select "**Open Link in New Tab**" so you can do a separate search or CMA while in the middle of searching or adding a listing in Matrix.

  My Matrix   Search   Realist   Add/Edit   Stats   Market Re
  Open link in new tab
  Open link in new window
  Open link in incognito window

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8. "3UP SIDE by SIDE" REPORT?

This report will not display like an agent single line or a REALTOR full. Instead, do the following:

o   From Search results, pick the properties you want to compare then click **Print**

o   From there, on the bottom are a few reports that do not display like REALTOR Full, etc.

o   Select **Single Family Residential 3-up Comparison** and it will be a PDF that you can print or email
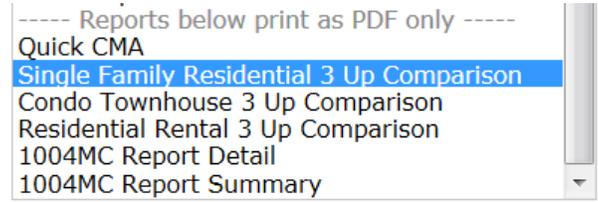
9. CMA

Do a search, select your listings from results, and then click on **CMA**. When the wizard opens, it looks like you have to add or use a contact (which would require said contact to have an email address in Matrix). Because there are no yellow highlighted fields on this page, it means that you can simply go to the next tab (**Pages** tab) without entering the contact info. There is a place on a later page that you can enter the homeowner name, subject property address, etc.
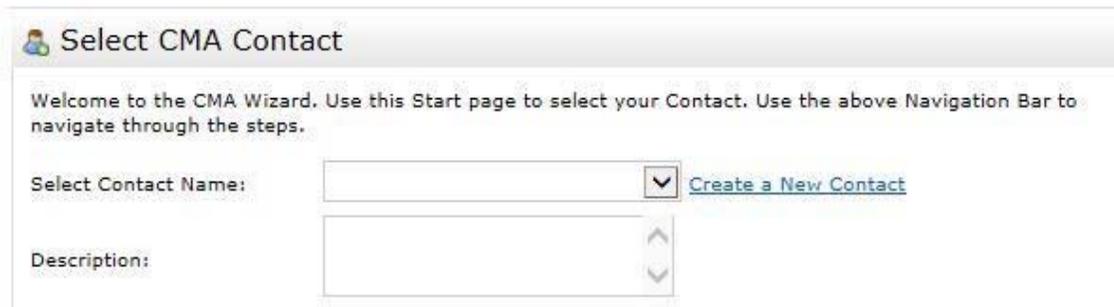
10. CONCIERGE MODE

Concierge Mode is an extra option for Auto Emails. This mode allows you to Approve or Reject the listings to be sent out to your client. If you are interested in the **Concierge Mode**, you have to activate it first in My Matrix. You can do this when saving a search in the Settings section of the Saved Search process.

Note: Not all agents will want to use this feature. By using the Concierge Mode, you are creating an extra step for sending out Auto Emails to your client(s). However, you are choosing which listings go to your client(s).

Note: You cannot concierge yourself as a test unless you use a DIFFERENT EMAIL ADDRESS!

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## 11. RECENT CHANGE INFO ON REALTOR FULL/360 PROEPRTY VIEW DISPLAYS

A price increase/decrease, Status Change and a New listing will trigger a 'recent change' message to appear.

12. 1004MC

The 1004MC Appraiser tool is a REPORT/DISPLAY in Matrix. Look for it where you select what type of report to print. There is also an Export available for this report.

13. TIMEOUT

The default timeout is 120 minutes and there will be a 5-minute warning. It will save your work if you are in the middle of adding a listing but have not yet saved as Incomplete. Once you log back into the system, a box will appear like the one below with your incomplete work. You have the option to restore and continue entering your listing. For searches, take a look at your 'Recent Searches' menu up top right to find recent searches (see next page for sample).
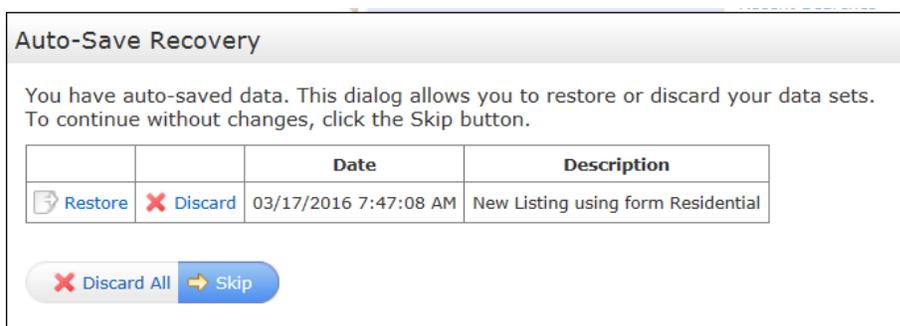
14. CLIENTS OPTING BACK IN TO RECEIVE EMAILS FROM MATRIX

If your client previously chose to unsubscribe from Matrix emails and would like to opt back in, follow these steps:
o Your client must send a blank email to optin.NYS@matrixemailer.com from the email address that was unsubscribed.
o You go to **My Matrix,** then **Auto Emails**. Click on the name of the auto email (*under the Subject column*) or the corresponding downward-pointing arrow to open the full options, then click **Settings**.
o On the Settings screen under your message, change the auto email to **Enabled** and click save.
   Your client should now be able to receive emails from Matrix.

15. LISTING NOTIFICATIONS FROM MATRIX

o **Expiring Listings** - In Matrix, all listing agents (and co-listing agents) are sent an email notification 7 days prior to Expiration Date and again 1 day prior to the listing expiring.

o **Pending Date** – Listing agents are also sent a notification 120 days after a listing goes to Pending and/or Under Contract status to remind them to make it sold if it closed, or expire it if the deal fell through.

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