CoreLogic®

Matrix Overview Training

Matrix™

Matrix URL: https://portal.mynysmls.com

Use this for PC's, laptops, tablets or phones.

Matrix works across all popular browsers and platforms

Matrix Help Line via AnswerLink

1-888-825-5472

M-F 8:30am - 8:30pm, S-S 8:30am - 3:30pm (EST)

Check out the User Guide and Tutorials links at:

https://www.grar.org/mcar-matrix-tips/

The details that appear on listings for you come from the GRAR Memberships system. The settings in this document will not change how information about you appears in listings. If you want to make changes to that information, contact GRAR or you may make most changes in your GRAR member portal in the **My Profile** section. These changes affect reports including CMAs, your Matrix email signature and in your client portal.

TO DO #1: INFORMATION

This section is for information used on the Portal, in header and footers, and some other areas of Matrix. You can override what is in your membership system for your first name, last name, and several other fields. However, it is highly recommended that you contact GRAR to change your membership information at the source (or visit the in your GRAR member portal in the **My Profile** section). To proceed with My Matrix…

- Click on **Hello, *your name,* then Settings & My Information.**
- You will be on the **Information** tab.
- Edit the pieces of information you'd like to change and **Save.**
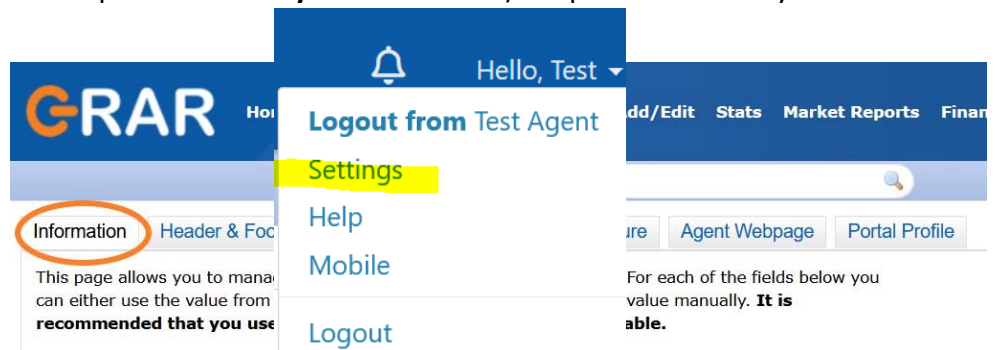
TO DO #2: HEADER & FOOTER

This is the header/footer that can appear when printing reports as well as the header of your Client Portal.

- Change to the **Header & Footer** tab in **My Matrix.**
- Choose one of the templates provided by clicking on the radio button next to the one you'd like.
- Click **Preview.**
- Upload a photo of yourself, if desired.
- Toggle through any of the branding you would like to show in the Header and then, click **Save.**
- If you also want a print footer on your reports, scroll all the way to the bottom and select that option.
- **Optional** – If you want to create a Custom Header/Footer and import it:
  - Click the radio button next to **Upload a custom banner image.**
  - Browse for the image and then click **Upload images**. Click **Save.**

Note: For best results, the optimum image size for an **agent photo is 66 x 79 pixels** and the **header/footer banner is 1600 x 120 pixels.** When viewed on smaller screens or printed, the right side of the header will be hidden. Please be sure that any text or important imagery is within the left 800 pixels of the image.

Technology Tips   **GRAR | Education. Information. The tools and support you need.**   P. **1** of **4**

GRAR Member Services | M-Th 8:30am-4:30pm, Fri 9:30am-4:30pm | **585.292.5000** | GrarHelpDesk@grar.net
Matrix MLS Support | Contact AnswerLink M-F 8:30am-8:30pm, Sat-Sun 8:30am-3:30pm | **888.825.5472**
Last update: 5-Nov-20

MY MATRIX: Personal Marketing Info

TO DO #3: CMA COVER SHEET

This is used with CMA (available in your search results) and allows you to adjust your contact info on the front page.

- Go to the **CMA Cover Sheet** tab in **My Matrix.**
- Modify information as needed.
- Click **Save.**

TO DO #4: EMAIL SIGNATURE

Set this up so you can turn on Auto-emails and user other email functions.

- Go to the **Email Signature** tab in **My Matrix.**
- Add your photo, text and any links you would like. Click on the **Save** button to include this signature on all outgoing messages sent by you, or on your behalf, from Matrix.

TO DO #5: AGENT WEB PAGE

If you do not have a webpage, the MATRIX Agent Web Page gives you the functionality of your own website without having to develop one. If you have your own domain name (URL – sometimes called a vanity web address), you can redirect your domain name to the MATRIX Agent Web Page. You do not need a vanity web address to use the Agent Web Page. A URL will be provided that you can give your clients.

- Go to the **Agent Webpage** tab in **My Matrix.**
- **Activation**
    o Select the **Enable Agent Web Page** radio button to activate your webpage and allow visitor access or you may click the **Disable Agent Web Page** option to prevent visitors from accessing your site.
    o 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 you will share with others (if you prefer to use your own domain, see "Additional Domains" below).
- **Homepage Content**
    o **Title:** Add a **Title** that will appear above the content on your website's "Welcome Page".
    o **Content:** Click inside this area and use the associated "Rich Text Box" buttons to add content to your webpage.
    o **Additional Sections**: Select which profile info you'd like to include from the Portal Profile tab.
- **Map Area**
    o Configure how the map should be used on your website.
- **Other Options**
    o Select this checkbox if you would like to include a "Sign-up" form for your website visitors. If so, then add an optional "Sign-up Message" (welcome or perhaps informational).

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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 of Matrix).

- **Additional Domains**
  - If you currently own a domain name and 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 and then click the **Add** link.

    Note – You must **notify 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, your must set up the redirection yourself. Simply forward your domain to your website at the "Web Page URL" (see above).

- Click **Preview,** make changes, as needed.
- Click **Save.**

TO DO #5: PORTAL PROFILE

Your Client Portal includes a customizable page named 'My Agent' which gives your contacts more information about you. Take the opportunity to standout! You can turn each of the available sections below on or off, edit the content in them, and drag them into the order you want. The information available for the Client Portal includes the items you edited above on the **Information tab**. If you do not see many items to choose from, you may need to first edit them on the Information tab.

- Go to the **Portal Profile** tab in **My Matrix.**
- Click on closed Panel Bar to show the contents of that panel. Modify information, as needed.
- On the right, check any panel to **make its content visible** in the "My Agent" section of the Client Portal.
- **Click the Photo panel to add a photo and then c**lick **Save.**
- Click the **About Me** panel to add a bio or perhaps a short message to share with your customers.
- 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.
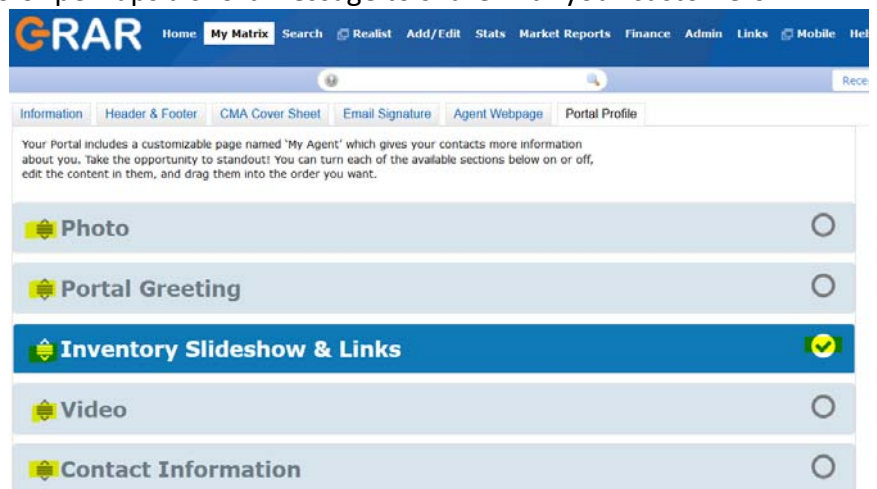
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# MY MATRIX: Personal Marketing Info

Adding Your Photo to Matrix so it Shows in the Matrix Roster (when searching for agents):

To change your photo in the Matrix:

1. Go to **Add/Edit.**
2. Click on **Edit Existing** in the **Roster** category.
3. Search for your ID.
4. Click on **Photo** (the only thing you can edit).
5. Checkmark the photo you want to get rid of (if applicable) and click on Delete Checked.
6. Import your new photo and **Save**.

Technology Tips   **GRAR | Education. Information. The tools and support you need.**   P. **4** of **4**

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Matrix MLS Support | Contact AnswerLink M-F 8:30am-8:30pm, Sat-Sun 8:30am-3:30pm | **888.825.5472**
Last update: 5-Nov-20

LISTING INPUT

1. Click on the **Add/Edit** tab in Matrix to begin & then click on **Add new** to begin.
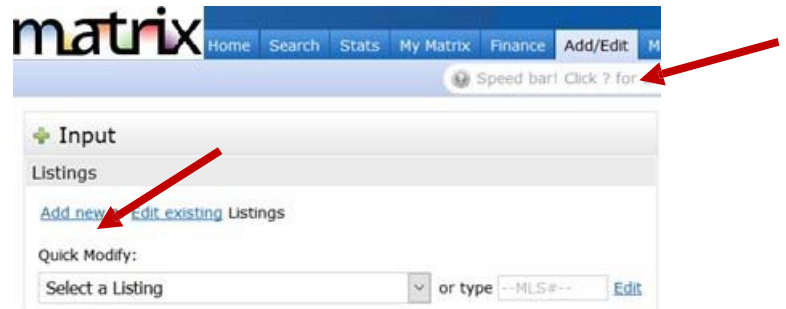
2. **Select a Property Type Form**

3. **AutoFill from Realist or Other Options to Get Started**
   The first screen of Input gives you three options when entering a new listing.

   1. **Fill from Realist Tax** (imports data public records – saves having to fill in all of the data manually but if needed you can modify the information that populates).
   2. **Copy from Existing Listing** (if your listing) via Cross Property Search
   3. **Start with a blank listing** (when your property is either not in Realist because we don't have that county or is to be built.
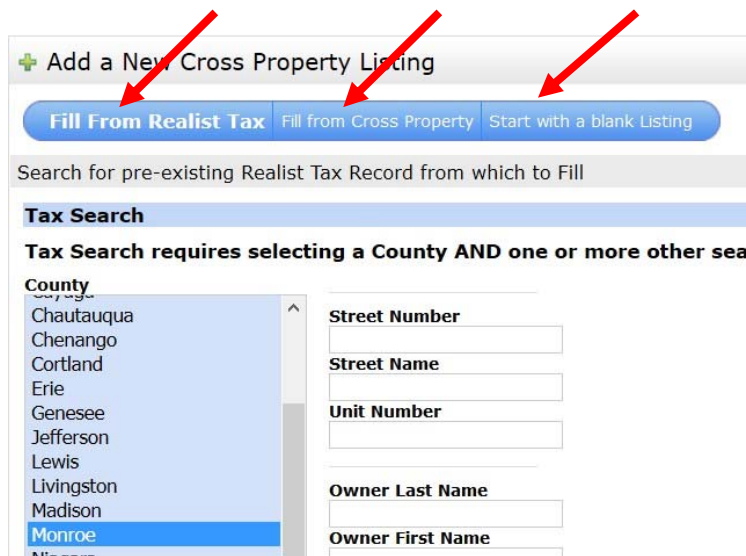
Once you select an option, you can proceed. It is best to start with Realist if the county is in the list.

Select a **County** and enter the address to import data from Realist and then click on **Search**.

Click on **Fill** when the matching property shows on your screen and continue.

4. **Add Edit Tabs**

   - **SCREEN DISPLAY** – Notice that all sections of the listing have **TABS** at the top for easy access. Once you have entered the Location info, you will simply click on the second tab for **Map.** You are free to move throughout the tabs as you wish.
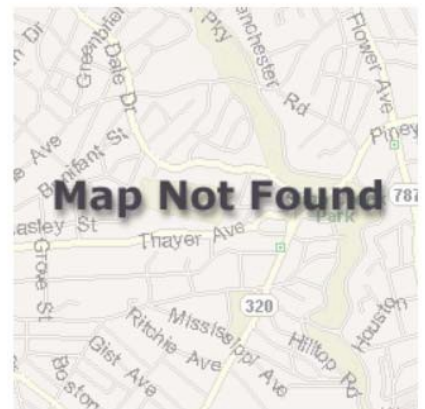
- **REQUIRED FIELDS -** The input screens show **all required fields in yellow**. Any field that is not completed will appear with a red icon beside it when you click on **Submit Listing** or **Validate.** If the info entered does not conform to a business rule (expiration date is prior to list date for example), a red exclamation point icon will also appear. Each tab header will indicate if there are problems within that tab.

- **UPDATE THE MAP -** There is a **MAP tab** that allows you to enter the latitude and longitude or move the pin placement manually.
    - When entering a new listing, you may try to click the **Get Lat/Long from Address** link in the Map tab if the property does not appear to have mapped the coordinates (says **Map Not Found**). This is how the system determines latitude and longitude in order to correctly display listings on a map & include them in map searches.
    - If still showing "Map Not Found", then click on **Set Lat/Long manually**. You will enter the address or address nearby if needed, and then click **Locate** to find the location. When you see the parcel, click on **Place new pin** where it should be placed on the map and then **Done**.

- **GOOGLE STREET VIEW -** Don't forget to **check/correct the Google Street View** for the property to make sure you can see it clearly (ex the big tree is not blocking the structure). Click on the **Choose Google Street View** link and then after the map popup displays, use the Google Map directional arrows to choose the best view of your listing. Click **OK**.

5. **Entering Data**

- On the **Listing Info** tab, after entering the List Agent ID, it is necessary to click on **Refresh** to populate the Listing Agent data.

- In the **General** Tab, to enter more than one Room simply click on the **More** button on the right and additional boxes will appear on the **General Info Room** grid.

  * Even if you are not entering room dimensions, it is recommended that you enter the room type and level.
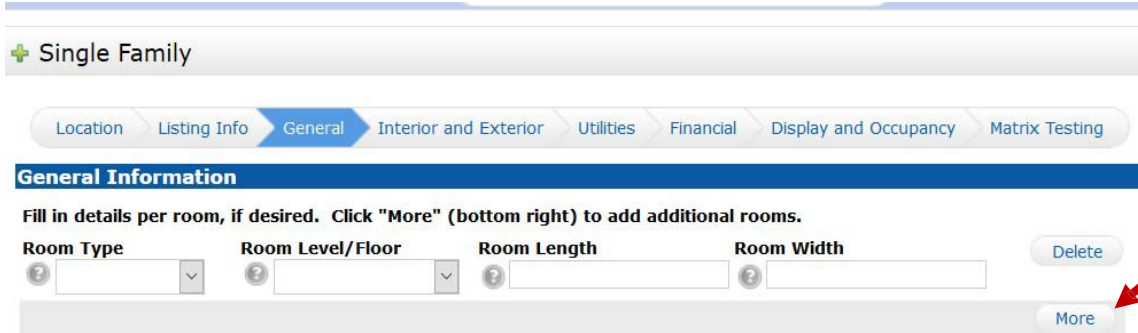
- **Opt-Out Tab**
  Only those with Office Manager access level and above will see the '**Opt-Out**' Tab in the listing during Add/Edit. This section will be used to opt individual listings out of Realtor.com (only if the brokerage has opted in). For Zillow, for UNYREIS members, the brokerage is either opted in our out and that is not handled on this screen and for Zillow, they cannot be opted in our out individually. In addition, if the brokerage is sending listings to Zillow via some other method such as via their franchise/head office, the Zillow field will NOT be check marked in the MLS on the listing.

6. **Saving the Listing**

- **Save As Incomplete** - At the bottom of each screen of Listing Input there is **Save As Incomplete** button. When you click on this button, Matrix will save all information entered to that point and allow you to access it anytime to finish. It will also append an ML# so now is a good time to go in and add your photos and attachments before making active.
  Note- 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 excluding weekends and holidays of ERS being signed.

- **Validate** – click **Validate** at any time while adding the listing 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 tab and correct the error.

- **Submit Listing -** Once all info is entered for the listing, click on the **Submit Listing** to make it active.
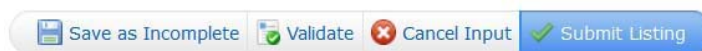
PHOTOS AND SUPPLEMENTS (ATTACHMENTS)

After your listing has been saved as incomplete, you may add photos and/or supplements (attachments) before making Active.

Don't forget to go back and make the listing Active after adding them.

Other Options

Manage Photos
Manage Supplements

- **Photos**
  - Matrix can hold a maximum of 50 photos per listing
  - For maximum quality, photos should be at least 1024x768 pixels in size
  - *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 and bottom or the left and right sides of the photo.*

- **Editing Photos**
  - When editing a listing (in Add/Edit after selecting a listing to Edit), go to the **Manage Photos** screen. Here you may upload multiple photos at once by holding the Ctrl (Option) key down when clicking on the filenames. To **change the order of the photos** once uploaded, drag by the grey title bar. There's an option in the bottom left hand corner to add a **Description** when adding/editing a photo. Click on any image to view its **Details**.
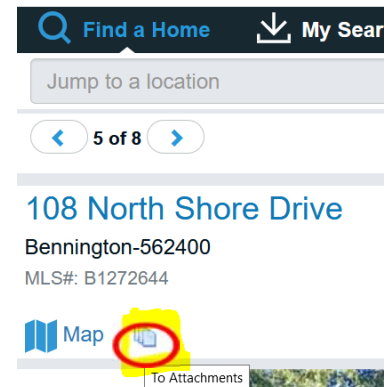
- **Supplements/Attachments**
  - Matrix can hold a maximum of 15 per listing
  - Each supplement can be up to 10 MB
  - Supplements can be PDF, DOC, or TXT formats
  - When you add a supplement/attachment to Matrix for a listing, there is a way to denote that a supplement is 'Public' (scroll down in the list of Supplement types). When you choose any of those, it will show the links to clients in client facing reports via the Client Portal.

🔍 **Find a Home**   ⤓ **My Sear**

Jump to a location

◁ **5 of 8** ▷

108 North Shore Drive
Bennington-562400
MLS#: B1272644

Map

To Attachments

Tip: **It is recommended to add your photos and attachments before making active.** Auto-email will not send a notification when photos are added (if added after the fact) in Matrix.

COPYING LISTINGS IN MATRIX

To copy a Listing in Matrix (when relisting or adding multiple properties in a subdivision for example):

- Go to **Add/Edit.**
- Click on **Add/new.**
- Select a **Property Type.**
- Instead of **Fill From Realist**, select the second option which is **Copy From Existing Listing.**
- 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.
  - After clicking on **Add/Edit** or **Edit listing** and entering the listing number, click on **Manage Photos**.
  - Click on **Click here to import photos from another listing.**

1. Wildcard Characters + - * !

a. + and -

When searching in numeric fields (Price, #Bed, #Bath, SqFt, etc.) you must use a + or - to indicate values. 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 10 for exactly 10.
Enter 10-50 for the range 10-50.
Use 10+ for more than 10.
Use 10- for less than 10.

b. * Wildcard

When searching in free type fields (Subdivision, Street Name, Public or Private Remarks, Agent Name, etc.) you must use an asterisk (*) before and/or after the keyword to retrieve results containing that word.

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.

St#	St Pre Dir	St Name	St Type	St Post Dir	Unit #
	∨	riverview*	∨	∨	

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 #
	Sor ∨	lake*	∨	∨	
	∨	*s* *lake*	∨	∨	

c. ! – To Exclude

The exclamation point (!) is the operator to use to exclude something from your search results.

EXAMPLE: To search for properties with the word "Lake" in the street name <u>**except**</u> for properties on "Lakeshore" and "Lake Shore", enter the following string into a **single** Street Name field:

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

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

2. Selecting/Deselecting From a Pick List

To select from a pick-list, use the Control (Ctrl) on your keyboard. Hold Ctrl while clicking on the selection. Also use the Ctrl key to un-select an item. ** Mac Users: Use Command + Click for the process above.
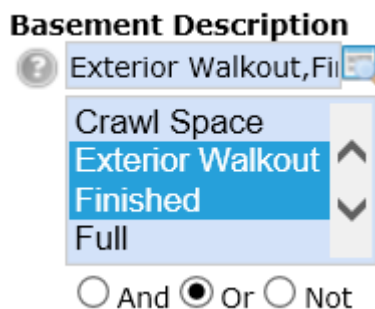
3. Selecting/Deselecting From a Drop Down List

To de-select from a drop-down menu, click on the top blank line contained in the menu.
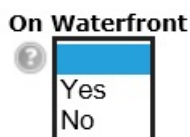
4. Adding Additional Search Fields

To add a field not included in the pre-set options, scroll to the bottom of the search screen and to find **"Additional Fields"** and click "**Add**". Select your field label and click "**Back**". The field will become part of this search template until you "Remove" it using the same method.
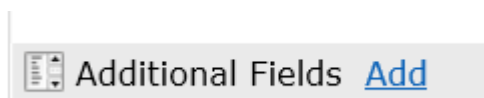
5. Save Your Search Template

If you typically start your searches the same way each time (for example, always the same county), you can set field selections to default by using the gray gear icon on the search page. Save clicks and eliminate erroneous results by setting starting defaults.
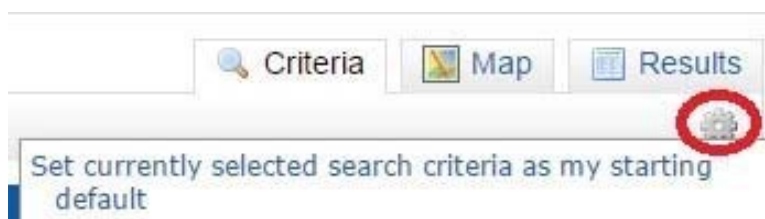
1. **GETTING TO MATRIX**

   Go to MATRIX from a desktop/laptop/tablet device – portal.mynysmls.com

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
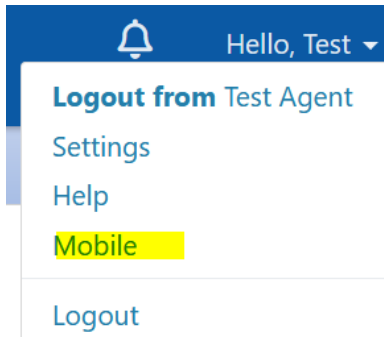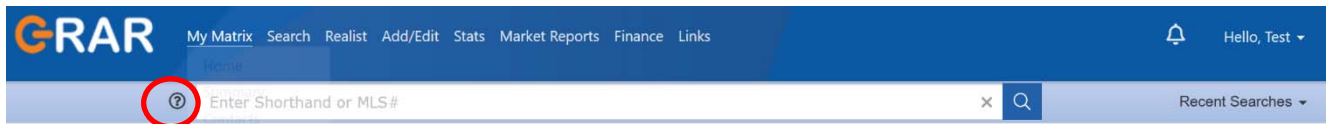
   From the mobile version Home Page, you can switch to the full site.
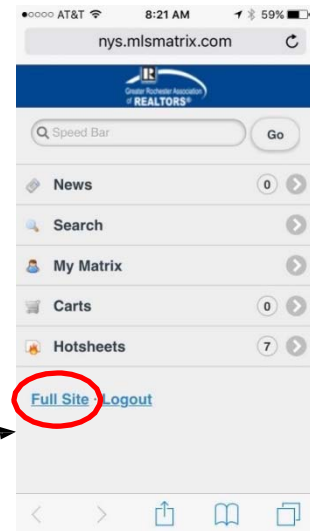
3. **SPEED BAR SEARCH**

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

4. **TEAM/VACATION 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 **Hello *Agent Name*** (up top right)
   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.

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.

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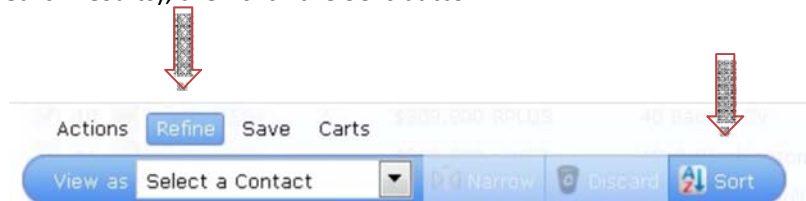
o **Search Symbols -** Search symbols such as + - = * or ! may be used in Matrix as follows:

   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.

   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.

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:

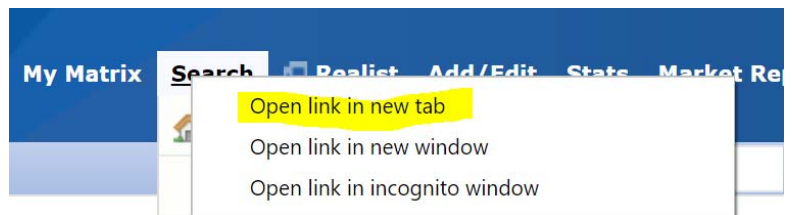**Ex. Lake*, !Lakeshore, !Lake Shore** (capital letters not necessary)

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 **Recent Searches** - At the top right corner of each Matrix page you can click on the Recent Searches button to open a list of, up to, the last 50 searches run

o **Clear Search -** If you need to **quickly clear a search screen** note the broom icon at the bottom left of any search screen.

🧹 Clear   47 matches   🗺 Map   ⊞ Results

o **Multi-Task/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

8. Customize the Results Display
The Results Display is basically a spreadsheet. You can sort the columns, add columns and rearrange the columns.
   o **To Sort a column**—place cursor on the column label and click. Each click will change the order of that column from ascending to descending.
   o To **Resize a column**—place point of cursor on right column border. The cursor will change to a 2 headed arrow. Then click and hold mouse button as you drag that border to widen or contract that column width.

- o To **Insert or Remove a column**—click within a column header. The cursor will change to a 4 pointed arrow. Then click once. This will open a menu with the options to Remove or Insert a column, change the alignment and/or Wrap a line of text within a column.
- o To **Reposition a column**—click and hold the 4 headed arrow in a column and drag the column.
- o The **Wrap Line option**—allows you to compress a column that might have many entries. For example the Addl Rooms field may have many entries that would be too long to display on the results display. If the Wrap Line feature was turned on for that column you could then compress that column into a list.
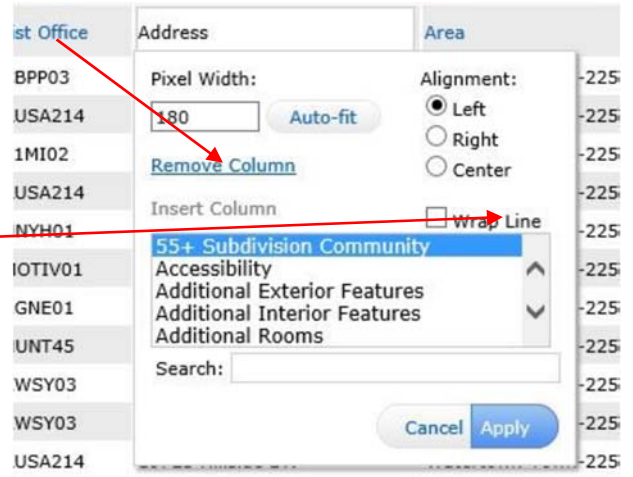
- o To **Save Click the Manage Display button. Then replace what you see in the Custom Display Name field** with a name for your custom format.
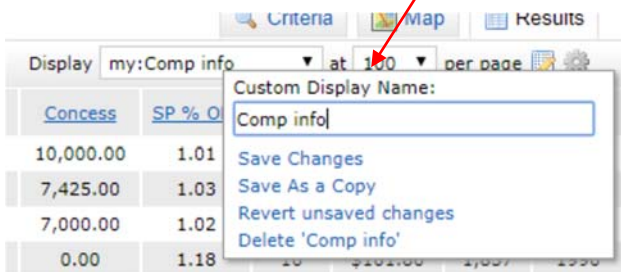
Future changes can be saved by clicking the **Save Changes** button.
o Delete a custom format by opening that format and clicking the **Delete 'format name'**
o Your format can be found in the **Display** drop down list.

9. "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
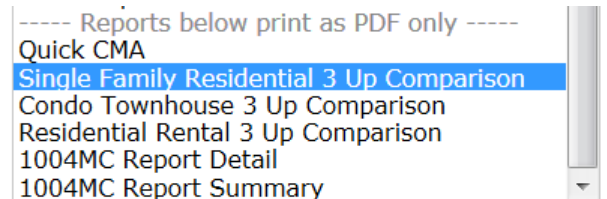
10. CMA

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. 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.

---
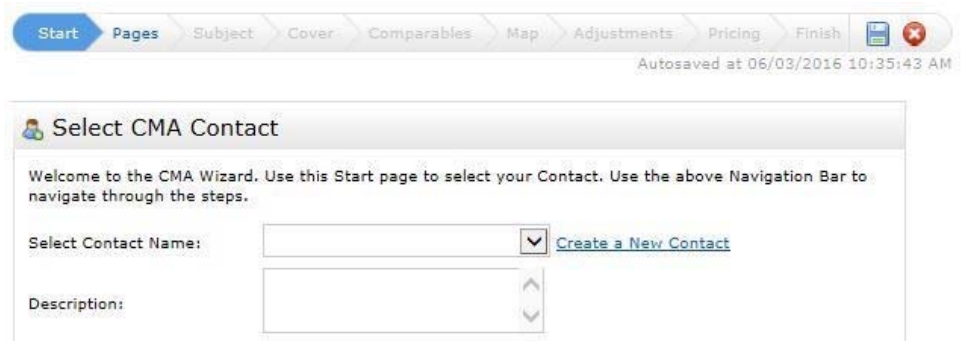
11. CONCIERGE MODE

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 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!

12. 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.

13. TIMEOUT

In Matrix, the default timeout is 300 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). Note – the portal timeout is set to 2 hours.
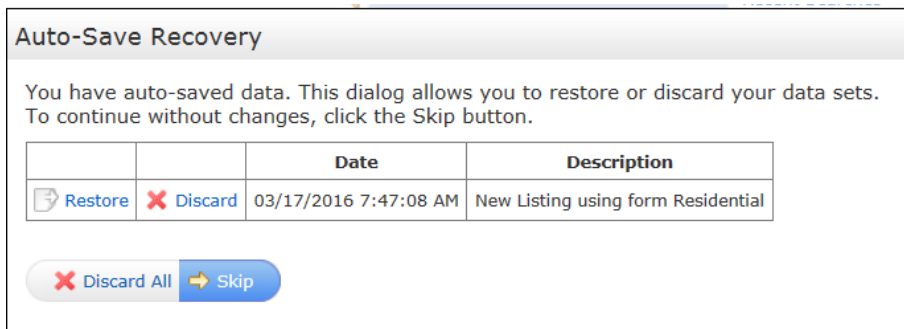
14. CLIENTS OPTING BACK IN TO RECEIVE EMAILS FROM MATRIX

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. If the listing remains pending, they are then sent a message about every 90 days until it is closed or expired.

Creating a Hot Sheet

Hot Sheets provide information about recent market activity in your chosen market areas. You can have a total of 10 different hot sheet formats.

1. Navigate to the **Hot Sheets** widget on the Matrix homepage. This is where you will both create and run your hot sheets. The Hot Sheets widget already contains one generic hot sheet for each property type.

2. To edit a generic hot sheet, click the **Customize** button.
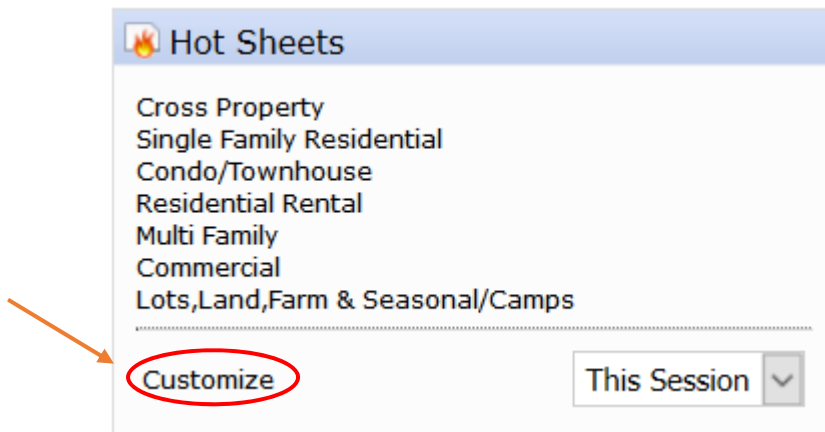
3. Click the **Edit Criteria** button on the Manage Hot Sheets window.

GRAR Member Services | M-TH 8:30am-4:30pm, Fri 9:30am-4:30pm | **585.292.5000** | GrarHelpDesk@grar.net
Matrix MLS Support | Contact AnswerLink, M-F 8:30am-8:30pm, Sat-Sun 8:30am-3:30pm | **888.825.5472**
Last update: September 1, 2016
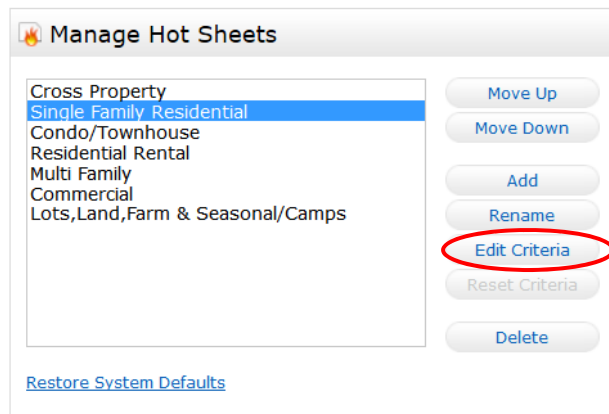
4. Select your criteria, click **Save** at the bottom, then click **Done** on the previous screen.

Change Type

- Price Decrease
- Price Increase
- New Listing
- Back On Market
- C-Continue Show
- U-Do Not Show
- P-Pending
- S-Sold
- W-Withdrawn
- X-Expired
- T-Temp Off Market

◉ Or ○ Not

Property Type

- Single Family Residential
- Condo And Townhouse
- Residential Rental
- Multi-Family Res (2-4) units
- 5 + Unit Apartments
- Commercial/Industrial
- Lots, Land, Farms, and Seasonal/Camp

◉ Or ○ Not

Clear   Cancel   Save

Technology Tips

P. **2** of 4

GRAR Member Services | M-TH 8:30am-4:30pm, Fri 9:30am-4:30pm | **585.292.5000** | GrarHelpDesk@grar.net
Matrix MLS Support | Contact AnswerLink, M-F 8:30am-8:30pm, Sat-Sun 8:30am-3:30pm | **888.825.5472**
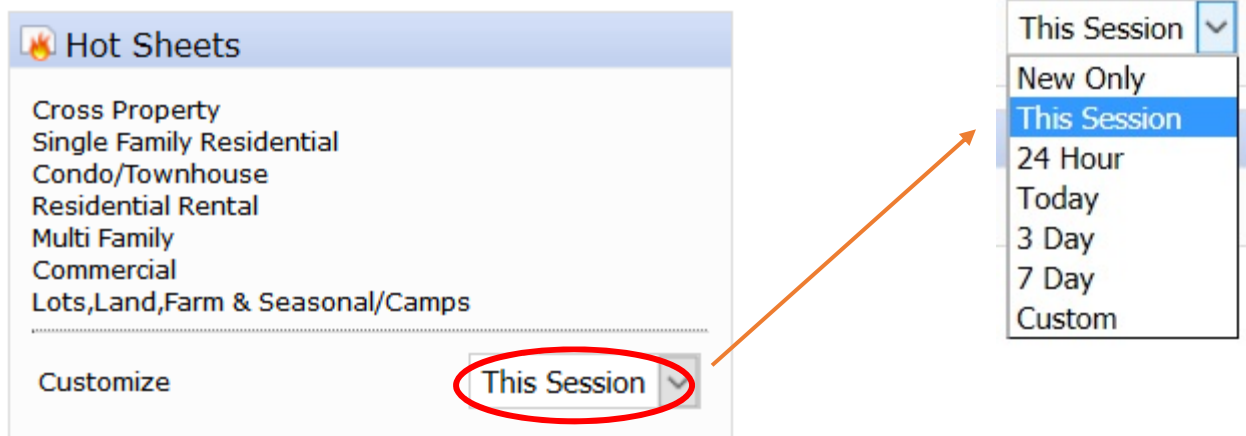Last update: September 1, 2016

Creating/Running a Hot Sheet

1. To run a hot sheet, navigate to the Hot Sheets widget on the Home page. Select the timeframe from the dropdown menu. Then click the hot sheet you wish to run.
   Ex. Click on **Today** for everything since midnight and then **Single Family Residential.**

a. **New Only** – only shows listings which are new/changed since the last time the user ran a hot sheet.
b. **This Session** – shows all listings that are still a match since the last time the hot sheet was run in the current session, plus any new/changed listings (e.g. 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 plus any new/changed listings since 9:00am).
c. **24 Hour, Today, 3 Days, 7 Days** – only shows listings which are new/changed in the specified timeframe.
d. **Custom** – allows the user to set a custom date or time range (for today) within the last 30 days. [Note: custom date or time settings are one-time settings which will need to be re-defined each time a hot sheet is run.]
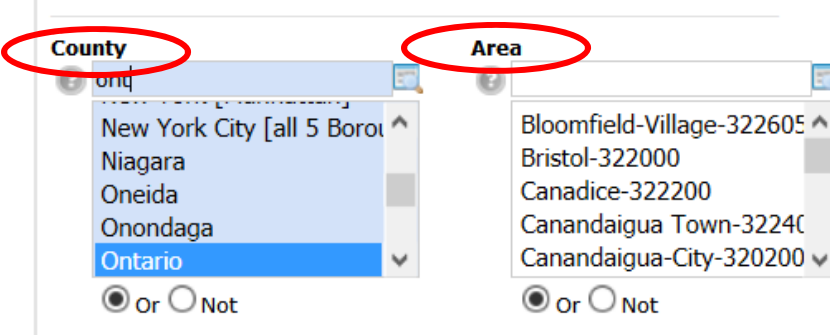
Market Watch Report

Market Watch allows you to keep track of changes happening in your local Market Area. Initially, your Market Watch will show you changes over our entire MLS area but you can choose to further customize it to a specific area.

Looking at your Market Watch widget on the homepage, **choose a property type** from the dropdown and then click **Customize**.

Choose your specific area. For example: If you would like you Market Watch to show you only "Ontario County", or just one specific city, or a combination of counties and cities, select them on your search screen and click **SAVE**.

About AUTO-EMAILS

- When saving a search, you will have an option to set up an **Auto Email.** Once set, you will find your Auto Emails under **My Matrix, Auto Emails.**

- If you choose **Daily** as the option for sending, there is an AM and PM option.
    - The AM emails are sent at 11:00am.
    - The PM emails are sent at 6:00pm.

- A maximum of 800 listings are allowed with a search associated with an Auto-Email. If the search returns over 800 listings, you will be prompted to edit the Saved Search.

- A **maximum of 8 email recipients** may be selected per email.

- **If you bcc yourself** (to receive a notification that an auto-email when to your contact), **you will also be able to edit the "Favorite", "Possibility" or "Discard"** icons in the portal for your client. >>
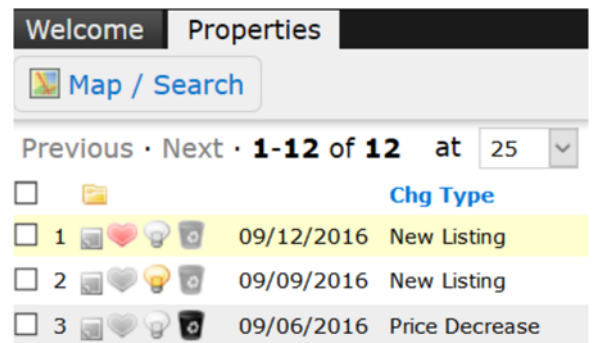
- After clicking **Save** to generate your first auto-email...
    - **Your client must click on the link they receive to view properties and activate recurring emails.**
    - You will be sent a notification email if the client does not activate their recurring emails after 23 days. You can then contact them to click on the link to activate within the next 7 days.
    - The client's auto-email will be deactivated if they fail to activate it after 30 days.
    - If the auto-mail was not activated you can re-send the Welcome message in **My Matrix, Auto Emails.** Click on the arrow next to the 'Subject' name you need to resend to.
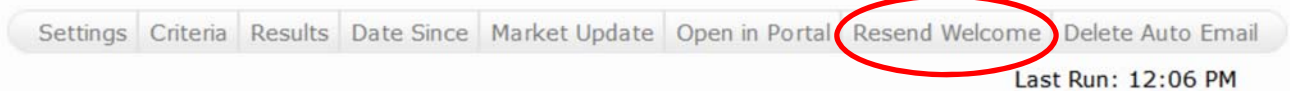

    - Workaround Tip- if you add a non-Matrix email for yourself as the cc address before resending, you may then activate the auto-emails for the client. After doing so, go back in and remove yourself in settings.
    - Once inactive, you may make an auto-email active in Matrix, which will restart the clock 30 days.

- If an **Auto-Email returns zero listings** for 365 days, it will be disabled by the system (you can enable again after disabled but not before). Consider changing the search parameters.

- If an **Auto-Email is not opened by your client, after being activated** (see above), it will be disabled after 365 days. You may then make it active again and resend Welcome message.

- In the client clicks on any link in the 365 days (after activating within the 30 days), they will automatically get 365 more days. In other words, active clients can stay active forever if they are interacting with system.

- The **triggers for an email to be sent to a client** are:
    - A new or revised listing falls into the search scope of the Auto-Email
    - A price change occurs on a listing that is within the search scope of the Auto-Email
    - The status of a listing changes to meet your search criteria– includes Back on Market
    - **Note:**
        - **An email is NOT sent when new pictures are added to a listing**
        - **What shows in your client's portal depends on what status(es) you chose to include in your search criteria to begin with. Ex. If you chose A and C status, then they will get updates when a listing changes to C status and it will remain in their portal. If not, the listing will fall out when it goes to C, U, P, S, X, W or T status.**

- **Status of Your Auto-Email**
  Once an Auto-email is set up, the email will be sent to your client. The status of your Auto-Email will be one of the following if you look in **My Matrix, Auto-Emails**:

   Auto Email is Active, but the Contact has not yet logged in and activated their portal or that search specifically.

   Auto Email is Active and has been accessed by the Client.

   Auto Email is disabled by client or agent.

  A client can unsubscribe from just one email, from all email from one agent, or from all email from the MLS. If your client is not receiving an email, make sure they did not unsubscribe from your or the entire MLSs emails.

- **Clients Opting in to Receive Emails from Matrix After Opting Out**
  If your client previously unsubscribed from Matrix emails and would like to opt back in, follow these steps:
    - Your client must send a blank email to optin.NYS@matrixemailer.com **from the email address that was unsubscribed**. Allow time for the email to be received and processed by Matrix.
    - After that, you must go to **My Matrix, 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** and **re-enable.**
    - **Click on Save.**

- **Auto-Email Issues**
    - When you have "narrowed" the search:
        - When setting up a saved search/auto-email, the search becomes 'frozen' when you save it. Thus, using the **Refine/Narrow** feature stops auto emails from sending out future emails. In other words, they will receive the listings you narrowed down but nothing new can match the criteria because you have narrowed it down to that group of listings.
        - If the client keeps checking the link with the narrowed listings, the listings will eventually expire, go to pending or be sold but will stay in the link, because you narrowed to those listings.
        - Instead, after narrowing a search for auto-email, if you wish it to keep finding and sending new matching listings, you need to approach it differently. Try the **Refine/Discard** option instead to get the listings you need and then save your search. You won't have 'narrowed' your search criteria only discarded unwanted matching listings.
    - Auto-emails are going to spam: Client should add the following email to their whitelist NYS@northeastmatrixmail.com or save as a trusted sender in their email program.

- **Client Portal Notifications for the Agent Via Text Message and or Email**

  See our Tech Tip on How to Configure Client Portal Notifications in Matrix for more details. The basics are as follows:

  - **Step 1:** Go to the **My Matrix** Tab and select **"Settings"**
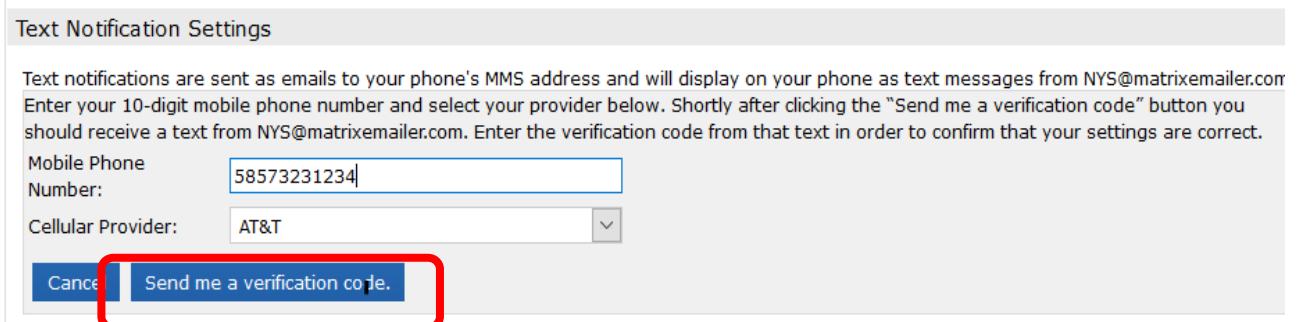 - **Step 2:** Click on **"Portal Notification Settings"**
  - **Step 3:** Select the Check box of Client Portal activities you want to be notified about.
    Note: If you choose email notifications, the email will be sent to your agent email address in the Matrix roster.
  - **Step 4:** If you chose to be notified via text, click the link below to edit your cellular information.

Portal Activity Notification Settings

Use this page to control how and when you would like to be notified of activity performed by your contacts.

When a contact does this...	Notify me ASAP via **Email**	Notify me ASAP via **Text**	Notify me via **Daily Summary Email**
Visits Portal	☐	☑	☑
Saves a Favorite	☐	☑	☑
Removes a Favorite	☑	☐	☑
Saves a Possibility	☐	☑	☑
Removes a Possibility	☑	☐	☑
Discards a Listing	☐	☑	☑
Un-discards a Listing	☑	☐	☑
Adds Notes	☐	☑	☑
Saves a Search	☐	☑	☑
Visits Portal First Time	☐	☑	☑

Text Notification Settings

Text notifications are sent as emails to your phone's MMS address and will display on your phone as text messages from CRMLS@matrixemailer.com

Mobile Phone Number: [   ]
Cellular Provider: [   ]

Click here to edit your cellular information

- **Step 5: Click "Send me a verification code"**

Text Notification Settings

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

Mobile Phone Number: [58573231234]
Cellular Provider: [AT&T ⌄]

[Cancel] [Send me a verification code.]

- **Step 6:** Enter the validation code received via text, then click **"Save my cellular information"**
- **Step 7:** Once completed, click **"Save"**