

WELCOME

Converting to Matrix™

A collection of feature-information and to-do items to help get you set up quickly and efficiently.

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Welcome to Matrix!

We know changing to a new system is never easy. To make the transition smoother, we have put together some information on various features within Matrix. Some are setup-oriented and have “To-Do’s” associated with them.

CONVERSION TIMELINE

What will convert and what will not? Below is a list of items that will and will not convert from Rapattoni to Matrix. Each are discussed further in this document to help you transition.

Will Convert	Will Not Convert
Listing Data	CMAs
Listing Photos	Custom Reports
Supplements/Documents	Custom Grids
Saved Searches & Auto-Prospects	IDX Setup
Contacts	Carts
Open Houses	Personal Information for Reports/Websites
Agent Photos for Agent Roster Search	Email Signature
Listing Transaction History – Status and Price	Incomplete Listings

Even though some items are being converted, there may be some changes that you will need to make to your settings in Matrix. Below are “To Do’s” for you to setup Matrix and make your transition easier.

If an item is not being converted, it does not mean the feature is not available in Matrix. For the non-converted items, you will need to either configure the items in Matrix or export information from Rapattoni as you deem necessary.

NOTE - BROKER IN CHARGE –TO-DO ON CUTOVER DAY (when you can access add/edit):

NAR Policy, MLS Rule section 18.2.12, requires the display of an email or phone number provided by the listing firm on all broker and agent websites that show listings from other brokerages (IDX data). To comply with this, the Broker in charge (or Office Manager) may log in to Matrix to indicate which contact info should show in the **Attribution Contact** field on listings for their brokerage when they appear on OTHER broker or agent websites (broker may choose from **Office Phone, Office Email, List Agent Direct Phone, Listing Agent Email** or **None**).

- See the attached [Attribution-Contact-Setup-Instructions-for-Brokers](#) for how to do this.
- Your choice will immediately populate this info this field (Attribution Contact) in all of your firm’s listings, which will show in the Listing Info section and feed out to websites along with your brokerage name.
- Brokers (or Office Managers and Office Admins, if applicable - please check with your managing broker before making any changes here) will need to do this for each branch if more than one exists. Remember that OD now precedes your OFFICE ID. Ex. If your Office ID was OFF, it is now ODOFF.
- Brokers should decide if agents may override this choice on their individual listings or not and can indicate that.

CONTACTS

Your Contacts have been imported to Matrix and will be updated once again at the end of parallel (details to follow).

If you edit a Contact in Matrix during the parallel period, that particular Contact will not be updated again. It will be assumed that the data in Matrix is up-to-date and should not be overwritten by what is in Rapattoni.

Contacts must have an email address to be converted. Emails are the unique identifier for contacts in Matrix. Below are some sample conversion scenarios.

1. Mary Smith, mary@yahoo.com
2. Mary Smith, mary@gmail.com
3. M Smith, home phone 301-555-1212, mary@yahoo.com
4. M Smith, home phone 301-555-1212
5. Mary Smith, home phone 301-555-9999
6. Bob Smith, mary@yahoo.com, cell phone 301-555-2323

Based upon the above, you will have the following Contacts in Matrix

1. Mary Smith, mary@yahoo.com, home phone, 301-555-1212, cell phone 301-555-2323
 - a. The conversion will merge records 1, 3 and 4. Record 6 will also merge due to the email address match.
2. Mary Smith, mary@gmail.com

Record 5 will not convert due to an email address not existing.

Contacts must have a first and last name. If either the first or last name is missing, the email address will be placed in the missing field.

To Do: Review Contacts - Make sure all your Contact information converted correctly. Edit your Contacts as needed to add additional information that may be in Matrix that was not in Rapattoni. Remember that sometime this week, we will get a final update of Contacts.

- Hover over **My Matrix** then choose **Contacts** to view your Contacts
- Click on the Contact Name to view Contact details.
- Click on the **Edit** icon in the top right corner to update your contact.
- A new screen will appear with a few pieces of information.
- Click on **Save** up top when finished.

You can also **Add a Contact** or **Delete a Contact** once you are in the Contacts section.

The Contacts, Auto-Email and OneHome Portal features of Matrix are integrated with each other. Make sure you read the sections on Auto-Email and OneHome Portal to understand more about how they work together.

SAVED SEARCHES/AUTO-PROSPECTS

Your **Saved Searches** will be imported as parallel ends. If you do not edit them in Matrix, they will be updated, if needed, when the final data update (of contacts, saved searches and auto-prospects) happens later this week. Any new Saved Searches added in Rapattoni during the parallel period will be added to Matrix at that time.

Your **Auto-Prospects** are also imported as **Saved Searches**, but they are not 'turned on' to send emails to your customers. You will need to do this manually. Instructions for this are further down in this document.

If you edit Saved Searches in Matrix during the parallel period, that particular Saved Search will not be updated at the final import during cutover week. It will be assumed that the data in Matrix is up-to-date and should not be overwritten by what is in Rapattoni.

- All saved searches that have been imported are marked with **(Imported_SavedSearch) search name**.
- The searches where all search criteria could not be converted are marked with **(Imported_SavedSearch*) search name**. It is recommended to check each of your Saved Searches to see if you need to modify the criteria. Data is stored in Matrix in a slightly different manner and there are many more options available to you for searching. Also, some fields were moved or removed from the system which would cause your Saved Search to have the asterisk **(Imported_SavedSearch*) search name**.
- Any search that was used for an auto-prospecting email will have a plus sign at the beginning **(Imported_ProspectSearch)**. You will need to enable these as auto-emails. See the auto-email section for more on how to do this.

To Do: Edit Saved Searches - It is recommended to check each of your Saved Searches to see if you need to modify the criteria.

- Hover over **My Matrix** and click on **Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name. The Criteria is shown below the option buttons.
- Click on **Criteria** to go to the Search screen if you need to modify.
- Click on **Save** after you've made any modifications.

To Do: Connect Saved Searches to Contacts - If your Saved Search or Auto-Email Saved Search is connected to a Contact in Rapattoni you will need to assign a contact in Matrix. A Saved Search does not have to be connected to a Contact, but it's obviously helpful in many situations.

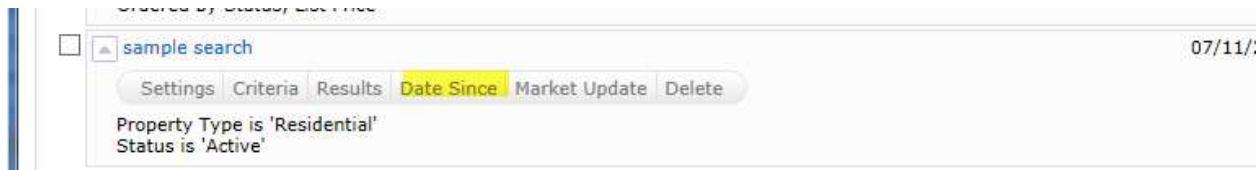
- Hover over **My Matrix** and click on **Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the **arrow** in the Contact box to select the appropriate Contact.
- Click on **Save**.

To Do: Set up My Favorite Searches – My Favorite Searches appears on the Home page of Matrix. **You can enable up to 20 searches to appear on the Home page.**

- Hover over **My Matrix** and click on **Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- **Check the box** to Enable as Favorite Search on Home tab.
- Click on **Save**.

DATE SINCE IN SAVED SEARCHES

Another unique feature with Matrix is the ability to execute a “date since” search on a saved search. This is similar to the hotsheet feature to see what has occurred since the last time you executed the search. To use this feature, click on the saved search under My Matrix and used the Date Since button shown below.



PERSONAL/MARKETING INFORMATION

The information from the ODBR membership system will be in the listings in the system. **The settings below will not change how information will appear in a listing.** Contact the Board if you need to change your information as it appears in your listings (ex. Update your Cell Phone, Direct Phone (may also be your cell phone) or email address).

Some features in this document will use personal information that is in the system for marketing purposes. For instance, it personalizes your headers or footers on reports. This personal information is not part of your Board’s membership system.

Before you start using Matrix, enter all of your personal information first. This will make it so other features will properly work when you turn them on.

To Do: Information – This section contains information used on the OneHome Portal (which is what your client sees any time you email them listings from Matrix), in print headers and footers as well as other areas of Matrix. You can override what is in your membership system for first name, last name, and phone numbers. However, it is highly recommended to contact the Board to change your membership information at the source for those pieces of information.

- Click on Your Name in the top right corner to access **Settings** and then select **My Information**.
- Select the **Information** tab.
- Edit the various pieces of information and click on **Save**.

To Do: Header & Footer – This is the header and footer that can appear when printing Reports and or if you choose to set up an Agent Web Page from Matrix.

- Click on Your Name in the top right corner to access **Settings** and then select **My Information**.
- Select **the Header & Footer** tab.
- If you want to use one of the templates provided, click on Select a different banner image/theme.
- Choose a theme then Click on **Preview**.
- Upload a Photo of yourself, if desired.
- Click on **Save**.
- **OPTIONAL** - If you want to create a Custom Header/Footer
 - Click on **upload custom banner image**.
 - Click on **Browse**. Upload images choose sizing and coloring as desired.
 - Click on **Save**.

Note: For best results, the optimum image size for an agent photo is 100 x 100 pixels and the header/footer banner is 946 x 120 pixels.

To Do: CMA Cover Sheet – This is used with your CMA and allows you to enter extra contact information just for a CMA. The photo for the CMA Cover Sheet can be a picture of a house or something real estate related. It is not intended for it to be a photo of you, but it can be if desired.

- Click on Your Name in the top right corner to access **Settings** and then select **My Information**.
- Select the **CMA Cover Sheet** tab
- Modify information as needed.
- Click on **Save**.

Note: For best results, the optimum image size for a CMA Cover sheet photo is 80 x 120 pixels

To Do: Email Signature – Set this up so you can turn on Auto-Emails and use other email functions.

- Click on Your Name in the top right corner to access **Settings** and then select **My Information**.
- Select the **Email Signature** tab.
- Edit how you want your signature to appear and click on **Save**.

Note - You can only insert photos for your signature that are used with your Print Header, CMA Cover Page or OneHome Portal Greeting.

To Do: OneHome Portal Information – This is used with your OneHome Portal which is what your client sees if you email them listings. The information available includes the items you edited above on the **Information** page. If you do not see many items to choose from, you may need to first edit them on the **Information** page.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **OneHome** tab.
- Modify information as needed.
- Click on **Save**.

Note: For best results, the optimum image size for a portal photo is 500 x 500 pixels.

AUTO-EMAILS

Since emails are already being sent from Rapattoni, Auto-Emails are not being sent from Matrix until you activate them. **Your Auto-Prospect Emails have been imported as Saved Searches but need to be manually activated.** Any search that was used for an auto-email will be labeled as follows: **(Imported_ProspectSearch)** or **(Imported_ProspectSearch*)** if some search fields may not have come over.

If you need help with your Saved Searches, please see the Searching section, further below in this document, for tips.

It is recommended for you to do the following before enabling any auto-emails:

- Watch the **OneHome Walkthrough** video (hyperlink below). This is a tour of the features available in the OneHome Portal that tells you and your client how this new portal works. <https://youtu.be/9C0jLXt3g64>
- Tell your customers the MLS system is changing so they will be aware of the change in the look and feel of the information they will see and receive. Tell them to authorize/allow emails from the new email address of the system NYS@northeastmatrixmail.com. Include the link to the **OneHome Walkthrough** video above if you like. This will help them understand the changes.

- Personalize your OneHome Portal Information in Settings (see above). Build it out so your customers have a pleasant experience, and it has your personal branding on it.
- Configure your Header/Footer options. The Header appears on your printed or emailed reports.
- Configure your Email Signature. This will enable your customers to see the information is coming from you along with your contact information.
- Customize your Welcome Letter that is sent when auto-emails are activated.
- If you have a vanity website/domain name pointing to your old system's portal, configure it to point to the new system. See the Agent Web Pages and Vanity Websites section below on how to do it.




When you turn on an Auto-Email in Matrix, you should turn it off in your old system, so your customer does not receive two emails from you. These will stop going out of Rapattoni by March 14 either way.

To Do: Enable Auto-Emails – Follow the steps below to setup auto-email for your customers and clients. We recommend not immediately turning those saved searches into auto-emails once updated as we expect a LOT of editing of listings those first few days in Matrix so it may be best to wait for the listings to get updated before sending to clients. Consider stating them over the weekend or next Monday.

- Make sure you have reviewed your **Contacts** as indicated previously.
- Make sure you have reviewed your **Saved Searches** as indicated previously.
- Make sure you have set up your **Email Signature** as indicated previously.
- Hover over **My Matrix**, then click on **Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the link at the top that says **Turn this Saved Search into an Auto Email**. If you have not yet selected a contact for the auto-email, you will be required to do so.
- Edit the information for the Auto-Email.
 - If you choose Daily as the option for sending, there is an AM and a PM option. The AM emails are sent at 11:00 a.m. The PM emails are sent at 6:00 p.m.
- Click on **Save**.

Note: A maximum of 800 records are returned with a search associated with Auto-Emails. Please make sure the Saved Searches that are enabled do not return more than 800 listings. If the search returns over 800 listings, you will be prompted to edit the Saved Search criteria. Use your back arrow to go back a page and enter more criteria.

Once an Auto-Email is setup, the email will be sent to your customer. The status of your Auto-Email will be one of the following (and you can find this in the **My Matrix, Auto Email** section of Matrix:

-  Auto Email is Active, but the Contact has not yet accessed the results.
-  Auto Email is Active and has been accessed by the Client.
-  Client or agent disabled Auto Email.

A customer can unsubscribe from just one email, or from all emails from one agent. If your customer is not receiving an email, make sure they did not unsubscribe from your emails.

If an auto-email has been setup and it returns zero listings for 90+ days, it will be disabled by the system. Also, if an auto-email is not opened by your client, it will be disabled after 30 days.

IDX

The IDX option in Matrix allows you to use an iframe for your website to allow your customers and clients to search from the MLS. This option is for those who have a website where they can edit the content and web pages.

If you do not have a website, check out the Agent Web Page option below. It gives you the functionality of a website without having to develop one.

- Click on Your Name in the top right corner, select **Settings**, then **IDX Configuration**
- Choose a **Name** for your page.
 - If you are only going to create one, you can enter something like “General Search.” If you are going to create different iframes, say one with map search and one without map search, name them accordingly.
- Choose the form selection
 - **Search** allows consumers to look for properties on their own
 - **My Listings** promotes your own or your office’s listings
 - **Map Search** allows consumers to look for properties using a map and search form
- Choose the **Map Area**.
- If you chose **Restrict Searches to a Specified Map Area**, you will need to use the **Set Map Area** option to specify the area for the restriction. Make sure you **Save** the Map Area.
- Under Activation, choose **IDX Enabled**.
- Add any of the **Other Options** desired.
- Click on **Save**.
- HTML will be generated for your iframe under the Activation section.
- **Copy the HTML** to give to the person who manages your website content.

If you have an existing IDX site, you can replace the HTML you currently use with the one generated above any time after parallel begins. You must do it before cutover or soon after or your website will no longer show new or revised listings.

AGENT WEB PAGES AND VANITY WEBSITES

If you do not have a website, no worries! Matrix allows agents to have a web presence without developing their own website. These are known as Agent Web Pages. If you have your own domain name (vanity website), you can redirect your domain name to Matrix’ Agent Web Page. However, you do not need a vanity website to use an Agent Web Page. A URL will be provided that you can give you clients and customers if you don’t have a vanity website.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Click on the **Agent Webpage** tab.
- **Enable** the Agent Web Page.
- Enter the **Web Page URL**.
 - If you do not have a vanity domain, you will use this URL for your customers. Choose something that is short but identifies you/your page.
 - If you do have a vanity domain, you will provide this URL to your domain service to redirect your vanity name to it.
- Create your **Homepage Content**.
- Choose the **Map Area** option desired.

- Fill in the **Other Options** section, if desired.
- If you have a vanity domain, add it under **Additional Domains**. This will be used for security purposes so we can validate the sites pointing to your Agent Web Page.
- Click on **Preview**. Make changes as needed.
- Click on **Save**.
- **Notify your domain registrar** if you have a vanity website.

If you have an existing vanity website, you can replace the information with your domain registrar any time after parallel begins. You must do it before cutover, or your website will no longer operate correctly.

MARKET WATCH

Market Watch is available on the Home page to provide you a quick look at what changes have occurred with listings in the system.

NOTE: ODBR MLS listings will not be reflected in the Market Watch during the Member Parallel period while Rapattoni is still the PRIMARY source for the ODBR listings. ODBR listings will start showing in Market Watch once the full transition to Matrix system is completed on the 14th.

Below is an explanation of the first few Change Types.

- New Listing - Listings that are new to the system (see time frame below).
- Back On Market - Listings that have moved from Pending, Withdrawn or any other Off-Market status back to Active status.
- Price Decrease - Listings where a decrease in price occurred.
- Price Increase - Listings where an increase in price occurred.

There are three options from the Home page to quickly change your look at the market.

- Property Type – Used to switch between Residential, Income, etc.
- Timeframe – Used to switch between Today, 24 hours, 3 days, and 7 days.
- Customize – Used to narrow the criteria (ex. by county) instead of defaulting to all listings in the NYS database. We recommend NOT narrowing by choosing Otsego-Delaware as your sub board as you will want to know if any other agents in our system have a listing in your area.

HOT SHEETS

As with Market Watch, Hot Sheets are available from the Home tab of Matrix. Hot Sheets are searches that can use the Change Types in the system to provide quick information on what has happened recently in the market.

NOTE: ODBR MLS listings will not be reflected in the Hot Sheets during the Member Parallel period while Rapattoni is still the primary source for the ODBR listings. ODBR listing will start showing in Hot Sheets once the full transition to Matrix system is completed on March 14 at noon.

By default, there is a Hot Sheet for each Property Type. To edit or add a Hot Sheet follow these steps.

- Click on Your Name in the top right corner and select **Settings**, then **Hot Sheets**.
- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.

Or

- Click on **Customize** under **Hot Sheets** from the **Home** page.

- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.

To run a Hot Sheet, follow these steps:

- Choose the **Timeframe** desired –
 - This Session – Since you logged into Matrix
 - New Only – Adds the Change Type of New only
 - 24 Hour – In the last 24 hours
 - Today – During the current day
 - 3 Day – In the past 3 days
 - 7 Day – in the past 7 days
 - Custom – allows you to choose any timeframe
- Click on the **Hot Sheet** desired.

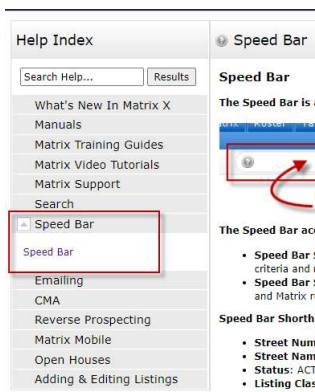
Note: There is a limit of ten (10) Hot Sheets that can be accessed from the Home tab of Matrix.

SEARCHING

There are two ways to Search in Matrix. One is on a Search Screen and the other is with the Speedbar. You can create saved searches for both. Speedbar Saved Searches are for use within Matrix only. Saved Searches from a Search Screen can be attached to a Contact and setup as an Auto-Email, if desired.

SPEEDBAR SEARCH

The Speedbar Search is for shortcut searching. This is where you will search by MLS Number. There is no need to be on a Search Screen to use the Speedbar. When in Matrix, click on the Help icon next to the Speedbar for tips on how to use it. Also, help is available from the Help option on the Utility Menu under FAQ's.



One of the best ways to learn how to use the Speedbar is to watch what Matrix puts in the Speedbar when you do a regular search. The Speedbar will be filled in, even if you didn't use it. For instance, by searching Active, Residential listings in Oneonta, the Speedbar filled in the following.



Just like regular searches, Speedbar searches can be saved too. These use the slash ("/") to identify them from a non-saved Speedbar search.

SEARCH SCREENS

Search Screens allow you to search by using all the various criteria in the system. This can include items such as select values for appliances and/or list price. Use the Search tab to access all the Search Screens created in the system. There are Search Screens for each of the Property Types (or select Cross Property to search more than one at a time), Open Houses, Public Records, Agents and Offices.

SEARCHING BY STATUS

Searching by Status has the option to enter a Date Range or the Days Back to the criteria. Each Status has a date associated with it and the system is configured to know what date to look at. For instance, Active uses On Market Date, Expired uses Expiration Date, and Sold uses Closed Date.

If you are saving a search and want the dates to change as time progresses, you should use the Days Back feature. Here's an example:

Scenario - Today is 7/1/2021. You want to save a search with various criteria for a client (enter city, price, beds, baths as needed). You only want to find listings brought on the market in the past 14 days. Both methods will return the same results on 7/1/2021.

- **Using Date Range** – To obtain the last 14 days of listings, you would enter 6/17/2021-7/1/2021. However, the Date Range method will continue to give you the same exact listings each time the search is run. On 7/2/2021, it is still looking at the 6/17-7/1 in the criteria.
- **Using Days Back** – To obtain the last 14 days of listings, you would enter 0-14. With Days Back, it provides a rolling timeframe associated with the search. It will always return the past 14 days of listings as time progresses.

Statuses changed slightly with the conversion:

Rapattoni		Matrix
Active	→	A-Active
Contingent	→	C-Continue Show - Under Contract: Property available to be shown, contract exists – See Public Remarks.
N/A	→	U-Under Contract - Do Not Show: Property is not to be shown, contract exists - See Remarks.
Pending	→	P-Pending Sale: Contract exists and waiting for closing.
Expired	→	X-Expired: May be listed by another broker.
Released	→	X-Expired: May be listed by another broker.
Closed	→	S-Closed/Rented
Withdrawn	→	W-Withdrawn: May not be relisted while in this status, will expire on expiration date. Use T status when temporarily unavailable (no time limit).
N/A	→	T-Temporarily Off Market

NOTE: ODBR Incomplete listings will not be brought over to Matrix.

To Do: Review Incomplete Listings – If you have Incomplete listings that need to make their way into Matrix make sure to set them to Active before the Cutover.

SEARCHING BY PROPERTY TYPE

With Matrix, searching by more than one property type at the same time is possible. **To search by more than one property type, please select Cross Property Search from the Search drop-down menu.** There are also Property Sub Types that are available for some Property Types.

SEARCHING BY STYLE, LOT INFO AND SEVERAL OTHER PICKLISTS IN RESIDENTIAL

The Style, Lot Info, Additional Interior and Exterior Features fields are set up a little differently than some of the other picklist fields with regards to selecting more than one item in a list.

Usually, 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.

Some fields, like Style, 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. See image >>



ADDING ADDITIONAL SEARCH FIELDS TO A SEARCH

To add a field not included in the pre-set options, scroll to the bottom of the search screen, and 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.

REVERSE PROSPECTING

This feature facilitates agents contacting each other for their clients' mutual benefit. Listing Agents more easily find other agents with buyers looking for properties like the ones they represent for sellers. Agents representing potential buyers become more aware of available properties matching their buyers' criteria.

AGENTS WORKING WITH POTENTIAL BUYER(S)

To make a contact available for Reverse Prospecting, click the "Enable Reverse Prospecting" checkbox under the contacts detail page. That contact will become available for reverse prospecting by other agents, identified by a unique ID.

LISTING AGENTS

If you have a listing you want to conduct Reverse Prospecting on, go to the “My Listings” screen (*under the My Matrix menu*), select the listing you want to Reverse Prospect, and click the “Reverse Prospect” button. The display will show you a list of agents with contacts who have received your listing. If you contact an agent, be sure to give them the numerical ID from the display so they can easily find the matching customer. **NOTE:** Reverse Prospecting is completely anonymous for your buyers. List agents are not given your customer names or contact information. A numerical ID is used to keep it anonymous.

RETRIEVING REVERSE PROSPECTS

To retrieve your prospects, follow these steps.

- Hover over **My Matrix**, then click on **My Listings**
- Select either 'My Active Listings' or 'My Hit Counters' from the "Show" dropdown box
- Check off the desired listing you wish to view Reverse Prospects for.
- Click on the '**Reverse Prospect**' button below the results.
- This will produce a list of all agents who have clients set up on Auto Email which match your property.

DISPLAYS VS. REPORTS

In Matrix, there are Displays and Reports. Below is what distinguishes the two from each other.

Displays – Ex. 360 Property View, Client Full, Single Line w/ Photo

- HTML based information seen after you search in your browser.
- Printable from browser, with an option to include/exclude the header
- PDF version available with option for header to be added.
- Options to include/exclude photos if applicable

Reports – Ex. Quick CMA, Residential 3 Up Comparison (side by side report)

- PDF reports that are created with Crystal Reports that allow additional functionality over HTML.
- Different styling is possible and usually creates a more aesthetically pleasing view of the data.
- Aggregate functions available (i.e., Median, Average).
- Headers/Footers are defined by the report configuration

CUSTOM DISPLAYS

Your Custom Reports in Rapattoni will not be converted to Matrix. In Matrix, you can create a Custom Display by using the following steps.

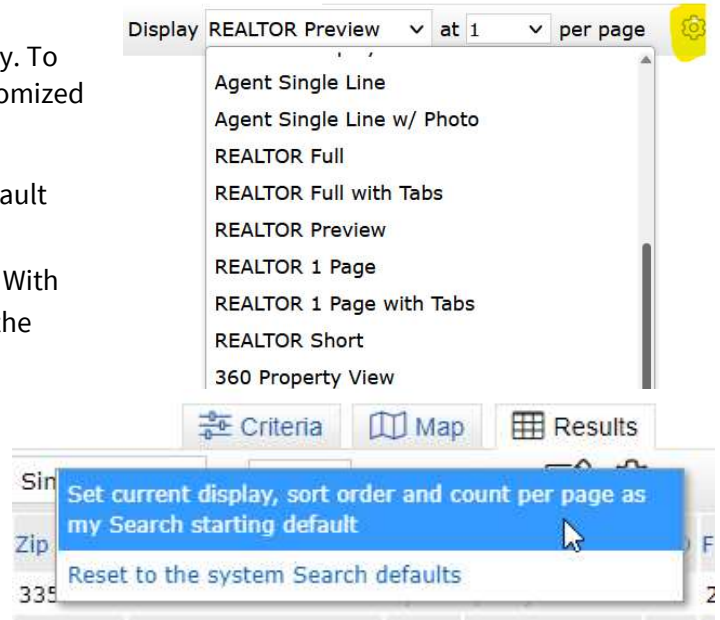
- Run a Search. The Agent Single Line is the default display.
- Hover over the icon to the right of “per page.” (It looks like a page of paper with a pencil on it.) It will say Manage Displays. **Click on the Manage Displays icon.**
- Choose **Save as a Copy.**
- Click on Your Name in the top right corner to access the **Utility Menu.**
- Select **Settings**, then **Custom Displays.** A list of Custom Displays will be shown.
- Click on **Edit** and you can add or remove items as needed.

There is no option to create full-page reports in Matrix but there are many already created to choose from.

SETTING A DEFAULT DISPLAY

When searching, the default display is the single-line summary. To change this to a different system display or one that you customized under Custom Displays, use the following steps.

- Run a Search. The single-line summary will be the default display.
- Choose the display desired, such as Agent Single Line With Photo, from the Display selection menu at the top of the single-line display.
- Select the **set default gear** located to the right of the Display options. Choose **Set Current Display** option.
- To return to the single-line display as your default, choose the Reset option instead.



EXPORT

A system export exists which will allow you to export the information that is on the system single-line display. To use the Export feature, follow these steps.

- Run a search.
- Select the listings desired using the checkbox.
- Click on **Export**, located at the bottom of the screen.
- Choose the Export **file format** desired.
- Click on **Export**.

CUSTOM EXPORTS

If the system export is not sufficient, you can create your own export layout. Follow the steps below to create your custom export file layout.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings**, then **Custom Exports**.
- Choose **Add an Export**.
- **Name** the Export layout.
- Choose the fields desired and click on **Add** to move them to the Export Fields side of the screen.
- Choose **Label** if you would like a header with the data.
- Choose your preference between Comma delimited or Tab delimited.
- Add a description, if desired.
- Click on **Save**.

Your export format will now be available from the Export function on the search results screen.

CMAS

CMAs from your old system will not be converted to Matrix. If you have CMA's you need from Rapattoni, we recommend you save each CMA as a PDF on your computer. Or you can recreate the CMA with Matrix.

There is no limit to the number of CMA's you can have. CMA's with over 365 days of inactivity are purged from the system.

START A MANUAL CMA

To create a CMA from scratch, follow these steps:

- Hover over **My Matrix**, then click on **My CMAs**
- Click on **Start a New CMA** or you may also start one on any Search Results Screen by choosing **CMA** in the results Menu Bar.
- You will be walked through the CMA Wizard. This will include the following items:
 - **Start** - Select a CMA Contact, language, and type
 - **Cross Property** CMAs contain only listing data
 - **Matrix 360 Property** CMAs contain a blend of MLS and Public Record data
 - **Pages** - Select the Pages for the CMA
 - **Subject** - Select a Subject Property
 - **Cover** - Edit the Cover Information
 - **Comparables** – Search for and add Comparables
 - **Map** - Review Map information
 - **Adjustments** - Adjust the comparables based upon the attributes of the listings.
 - **Pricing** - Review the Pricing section. Add in your **Suggested List Price** and **Notes**.
 - **View, Save, Print and/or Email** the CMA as needed throughout the process.

At times, some items in the Wizard may not be available. Certain Pages need to be selected for options to be available. For instance, if you have not chosen a Cover Page to print, the Cover option will not be available.

START A CMA USING THE COMPARABLE FINDER

To start a CMA using comparables suggested by Matrix, follow these steps:

- Run a search for a specific listing or Public Record
- View the **360 Property View** and click the **View Comparable Properties** button
- Matrix will return up to 20 comparable properties based on your subject property
 - You can remove or add comparables
 - Click **Find More Comparables** to find additional records or see the criteria used to return the initial results
- Generate a CMA report with the **View Report** and **Email** buttons or click **Create CMA** to enter the CMA Wizard and customize your CMA.

TEAMS

Matrix allows you to create and manage a formal team or allow someone to collaborate with you occasionally for vacation coverage. Agents (or their assistants) may work on behalf of another agent. It is also possible to impersonate another agent with their permission.

Note: Matrix will only allow you to add someone to your team who has an Active Matrix ID on the system and in your same office.

IMPERSONATE ANOTHER AGENT

If an agent you work with added you to their team in Matrix and set you up to *impersonate them*, you would be able to do the following things:

- Emails sent from Matrix would be sent from their name and email address and would use their email banner and footer (if they had chosen one) and email signature.
- Print reports – any reports that are printed while impersonating another agent will have the information of the agent being impersonated in the “Courtesy of” information. In other words, the report will look as if it were printed by the agent that you are impersonating.
- Access another agent’s Matrix Contacts, Saved Searches (you cannot change their team settings). When you send an email from Matrix while you are impersonating another agent, the name and email address in the “From” line will be highlighted in yellow. This is to call attention to the fact that you are sending that email as that agent. This means that to the client, the email will look exactly as if it came from the agent being impersonated.

WORKING ON BEHALF OF ANOTHER AGENT

If an agent you work with added you to their team in Matrix and set you up to work on *behalf of them*, you would be able to do the following things while working on behalf of them in Matrix:

- Emails sent from Matrix would be sent from your name and email address on their behalf, and would use your email banner and footer (if you have chosen one) and email signature.
- Print reports - any reports that you print while working on behalf of another agent will indicate that they were printed by you on behalf of the other agent.
- Access their Matrix Contacts, Saved Searches (you cannot change their team settings)

ADDING OTHER AGENTS AS YOUR TEAM MEMBERS

Each Matrix user that is added to your team will have full access to your Matrix account and can either “impersonate” you or “work on your behalf,” depending on the type of access you grant them.

HOW TO SET UP A TEAM

Below are the steps on how to setup a team in Matrix.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings**, then **Team Settings**.
- Click the link **Click here to create a Team**.
- Type in the agent ID for the person you want to add to your team then click **Find**. If you do not know the ID, you can find it through an Agent search.
- Select whether you want this colleague to **Impersonate** you or **Work on Behalf** of you.
- Click **Add**.

After adding your first team member, you will come to the main Team Settings screen. Here you can control the following items.

- Add additional team members.
- Delete team members
- Edit team members status (impersonate or work on behalf).

- Name your team.
- Set yourself up to either impersonate or work on behalf of the team.
- Allow team members the option of switching between their own names and the Team name when printing and emailing to Team Contacts.
- Disable the team function.

After enabling the Team function, you will be alerted to it on the Home page each time you login.

When one of your team members logs in, they can switch from their own individual login to the Team login by clicking on their name in the upper-right corner of the screen to open the select popup. There they can click to select the team’s name (or your name if you did not assign a team name).

They can now see in the upper-right (and highlighted in yellow on the Home page) that they are working as the team. When clicking on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to the Team’s items. When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone. If they are set to impersonate you, they have the same choice except that if they select the Team, it will use your email address, not theirs.

To leave working as the team and go back to working as yourself, click the “Working as” link in the upper right of the screen and click to select your own name.

ADD/EDIT

Matrix will allow you to input listings along with Photos, Attachments and Open Houses via Add/Edit beginning on 3/14/23 at noon. A listing must be added into MLS as Active within 24 hours of List Date, if defined in Exclusive Right to Sell or Exclusive Agency, otherwise, (within 24 hours) after all the necessary signatures of seller(s) have been obtained.

Things to know about Add/Edit - Roles are assigned to each person using Matrix. An agent can edit any of their own listings (when they are the Listing Agent or Co-Listing Agent - unless from a different brokerage). An office manager can edit listings within their office. A broker (or an approved admin and or office manager) can edit listings at the firm level, if needed.

NOTE: During Member Parallel, you will continue to input new inventory and manage your existing listings on the ODBR Rapattoni system. Access to Matrix input will become available once the full transition from Rapattoni is complete – after the Cutover.

AUTOFILL FROM REALIST OR OTHER OPTIONS TO GET STARTED

The first screen of Add/Edit gives you four options when entering a new listing.

1. **Fill from Realist Tax** and **Fill From Tax** (imports data public records – saves having to fill in all of the data manually. You can modify the information that populates if necessary).
2. **Copy from Existing Listing** (if it was your listing) via Cross Property Search
3. **Start with a blank listing** (when your property is not in Realist (we don’t have that county) or is to be built.

Fill from Realist Tax	Fill From Tax	Copy from Existing Listing	Start with a blank listing
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Once you select an option, you can proceed. It is best to start with Realist/Fill From Tax if the county is in the list.

1. Select a County and enter the address to import data from Realist and then click on Search.
2. Click on Fill when the matching property shows on your screen and continue.

To do: Add/Edit Your Listings in Matrix - When it is time to edit your listings in Matrix for whatever reason including price and status changes, there will be some particular areas to pay attention to including:

- **Public and Private Remarks may have been truncated in Matrix.** You will want to be sure that the important stuff is still there. Matrix allows for 1200 characters in Public Remarks and 1000 in Private/Agent Remarks.
- **Any Required Fields that were not required in Rapattoni or did not translate over well.** For example, Rapattoni had a lot of text boxes the Listing Agent could fill in for each field that had a picklist. Matrix is not set up that way so you may need to select additional options for picklist fields in Matrix.
- **Area Fields**
 - **Municipality in Rapattoni was matched to an Area/NY SWIS Code field in Matrix.**
 - This area is the municipality where taxes are paid for the parcel. In some circumstances, there may have been two choices in Matrix for a Municipality so all the listings from that Municipality got put in one choice for that area and may need edited. For example, in Rapattoni, the Municipality may be Cooperstown Village but in Matrix, there are two choices for Cooperstown Village. Most of the village lies within the town of Otsego, but some of the eastern part is in the town of Middlefield. Check these and other Villages that are split.
 - **Matrix has every Town/City and Village in NY, but it does not have any Hamlets.** So, if the property is in a Hamlet in Rapattoni, it will have been placed in the corresponding Town in Matrix. For example, West Bainbridge in Chenango County is a hamlet of the Town of Bainbridge so in Matrix, that parcel will be found in Bainbridge.
- **Zip Code in Rapattoni was brought into Matrix and then the Postal City was mapped from the zip in Matrix.** This may explain why it is different from whatever 911/Mailing City was entered here in Rapattoni. Matrix is strict about Areas and Zip Codes making sense and being valid with the USPS.

PHOTOS

With Matrix, when adding a listing there is a status of Incomplete. The incomplete status cannot be seen by others when searching, only when using the Add/Edit section of Matrix. This status allows you to be able to add up to 50 photos prior to submitting the listing to the system. Incomplete listings can stay in Matrix for up to 21 days (or until contract signed and then within 24 hours).

When entering a Photo in Matrix, you can enter a Description of the photo. This can be a title, such as “Kitchen,” or a description about the photo, such as “View from back deck overlooking Lake Smith.”

SUPPLEMENTS/DOCUMENTS

Documents are called Attachments in Matrix. All of your documents from Rapattoni converted into Matrix along with your listings.

Attachments can be any file type (.DOC, .PDF, etc.) however, it is recommended you upload documents in a PDF format.

Attachments in Matrix can have a file size of 10 MB each. There is a limit of 15 attachments per listing. Attachments are only visible within Matrix unless you choose a “Public” supplement type in Add/Edit. Then it will show in OneHome when other agents email the listing to their clients.