

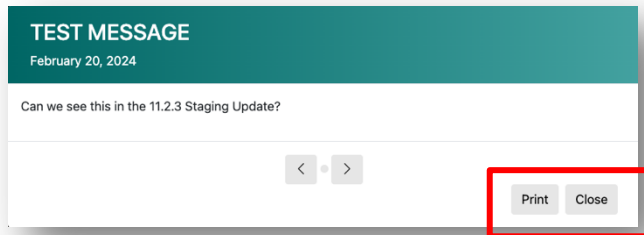
Introduction to Matrix

Technical Support: 1-866-776-0661
Monday - Friday 8:30 to 8:30, Saturday & Sunday 8:30 to 3:30

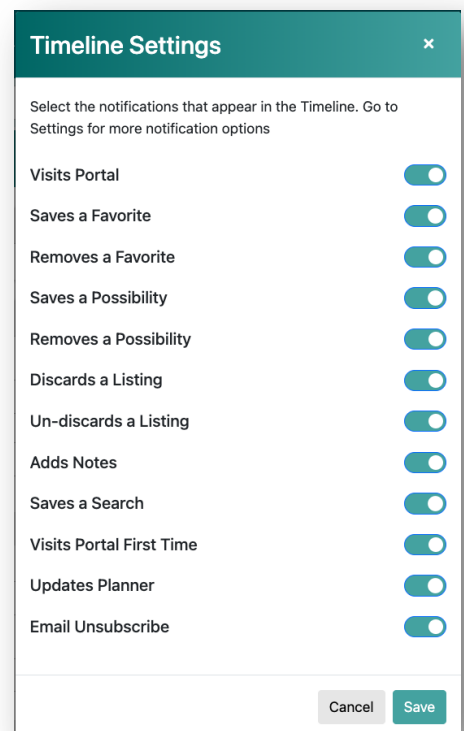
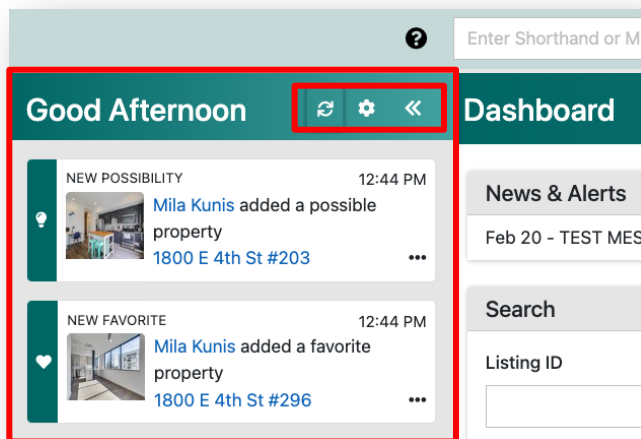
unlock **MLS**

Using the Home Page Widgets

News: Upon login, important news alerts will open automatically. You can Print or Close News.



DASHBOARD AND NOTIFICATIONS TIMELINE: Your dashboard has a pop-out setting on the left side. Click the >> next to “Dashboard” and this will pop out the Notification timeline. Click << to Close. This timeline can be personalized by clicking on the Gear.



Your Timeline allows you to see a custom view of your client's activities. This keeps you in the know when it comes to your client's actions in real time.

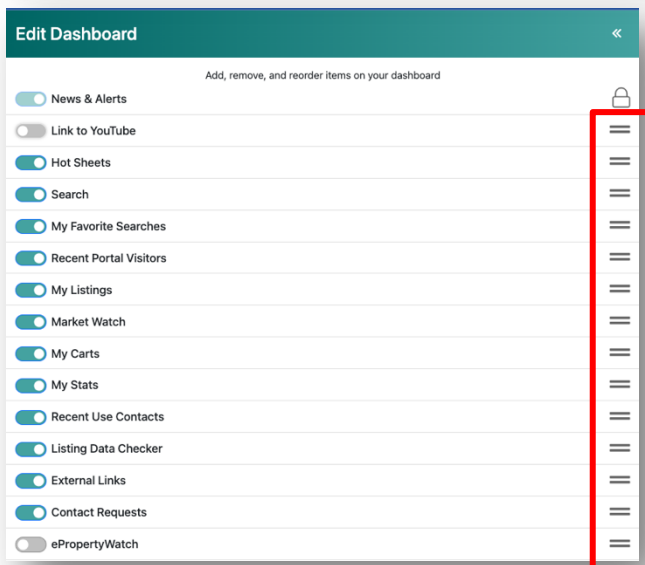
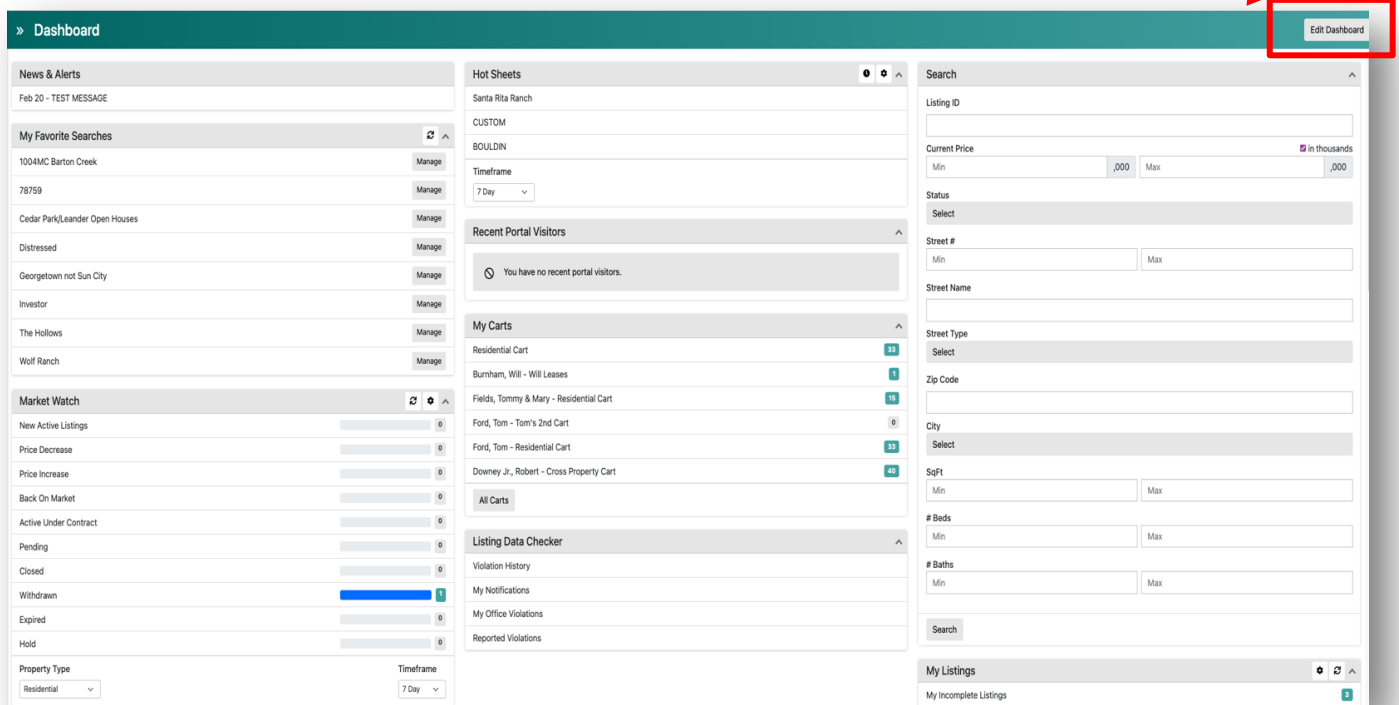
Look at the timestamp in right corner. Click clients name for quick access to that contact. Click the address to open the full listing in another window.

The 3 dots will expand to show the MLS number, full address, and the number of photos.

Use the Gear to set the customization. You can Refresh the Timeline by clicking the arrows that make a circle.

CUSTOMIZE DASHBOARD

To customize the Dashboard click “**Edit Dashboard**”. Select the widgets you want. “News & Alerts” cannot be turned off. You can expand or collapse them by clicking the up or down arrow on the right corner of the widget.



You can reorder the widgets by clicking on the 2 lines seen in red.

Click and drag these to reorder the widgets on your home screen.

You can turn these off and on by flipping the left button. When green the widget is on and off when grey.

There are 15 widgets for quick access. You have a Quick Search, My Listings, Listing Data Checker and External Links to name a few.

Search

Listing ID

Current Price

Min Max in thousands

Status

Select

Street #

Min Max

Street Name

Street Type

Select

Zip Code

City

Select

SqFt

Min Max

Beds

Min Max

Baths

Min Max

Search

My Listings

My Incomplete Listings	3
My Active Listings	0
My Active Residential Listings	0
My Active Residential Lease Listings	0
My Active Residential Income Listings	0
My Active Farm Listings	0
My Active Commercial Sale Listings	0
My Active Commercial Lease Listings	0

View All

External Links

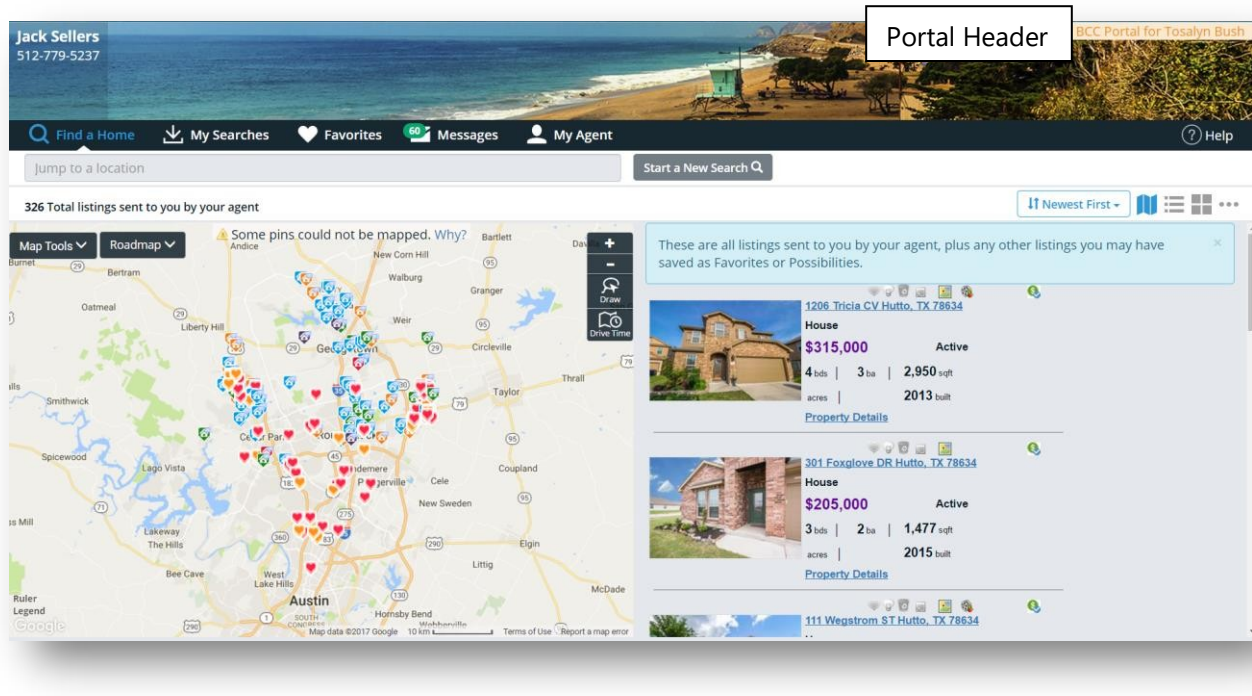
Support and Feedback
Remine Pro
Austin Board of REALTORS®
TransactionDesk by Instant Solutions
ShowingTime
Data Co-op
DOM Calculator
Down Payment Resource
MLS Rules and Forms
Property Panorama
REALTOR Property Resource
Supra
Texas REALTORS®
MyFloodStatus
RatePlug
ePropertWatch
NewHomeSource Professional
Builders Update
All Links
Feedback - Forum

Listing Data Checker

Violation History
My Notifications
My Office Violations
Reported Violations

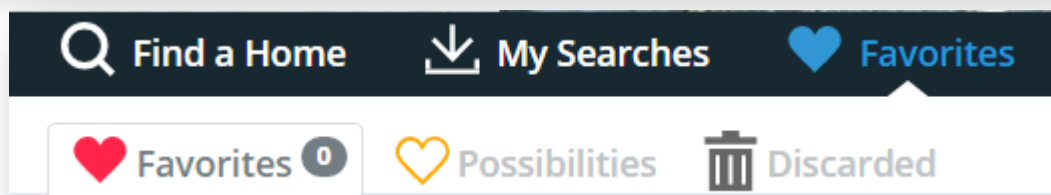
The Portal

Your clients will use the Portal to view properties and reports. This tool is used for both buyers and sellers alike. Your client automatically gets a portal after you add them as a contact, and send them a listing. Set up a test client with a separate email address. Now you can explore the Portal from a client's perspective.



5 TABS IN THE CLIENT PORTAL

1. Find a Home
2. My Searches
3. Favorites
4. Messages
5. My Agent



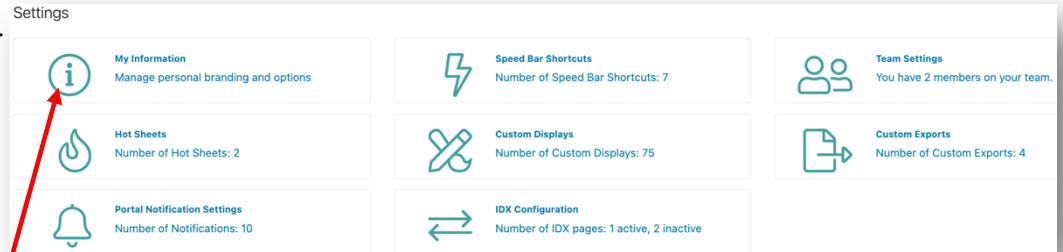
Tips

Encourage your clients to save Favorites, Possibilities and Delete the properties they no longer want to receive. Also encourage them to write any notes directly on the listing. Send them [Your Unlock MLS app](#) for your on the go clients!

Settings

My Matrix > Settings

Hover over the “My Matrix” tab from the Matrix navigation menu and select “Settings.” The following Matrix features appear in the Settings screen.



Settings Options

- My Information
- Speed Bar Shortcuts
- Team Settings
- Hot Sheets
- Custom Displays
- Custom Exports
- Portal Notifications Settings
- IDX Configuration

My Information

The screens that fall under “My Information” allow you to update the contact information your clients will see on reports emails and on the client Portal.



Visit all of the tabs that fall under My Information to make sure your contact information is correct, and your agent photo is uploaded in all applicable screens. Also set up your Portal Notifications under Settings to customize what activity you would like to be notified of



Portal Notification Settings

Number of Notifications: 10

Portal Activity Notification Settings: Choose when and how you want to get notified when there is certain activity. You can choose Email, Text, and a Daily Summary Email and what actions you want to be notified on. You can choose both email and text. *Next you will need to click on the blue link that says “Click here 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	Display on Timeline
Visits Portal	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Saves a Favorite	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Removes a Favorite	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Saves a Possibility	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Removes a Possibility	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Discards a Listing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Un-discards a Listing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adds Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Saves a Search	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Visits Portal First Time	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Updates Planner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Email Unsubscribe				<input checked="" type="checkbox"/>

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 ABORD@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 ABORD@matrixemailer.com. Enter the verification code from that text in order to confirm that your settings are correct.

Mobile Phone Number:

Cellular Provider:

[Back to Settings](#)

1. Put in your mobile phone number and Cellular Provider
2. Click Send me a verification code
3. Enter Code and “Save my cellular information”

Cellular Provider:

Enter 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 ABORD@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 ABORD@matrixemailer.com. Enter the verification code from that text in order to confirm that your settings are correct.

Mobile Phone Number:

Cellular Provider:


Header & Footer: Display a banner on the client's portal or a header/footer on printed reports. Choose from the available packages, upload a custom image, or choose not to use a header/footer. **The required image size for a Custom Header is 1600 x 120 pixels.**

[Information](#) [Header & Footer](#) [CMA Cover Sheet](#) [Portal Information](#) [Email Signature](#)

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

☐ Upload Custom Header/Footer Images

Basic Template




John Smith
Property Specialist - WeSell Realty Services
"Have a Nice Day!"

Office: (555)123-1234
Cell: (123)123-1234
Fax: (123)123-1234
jsmith@noplace.com

Click "Select a different package" to change the header or upload a custom header.

Portal Header:



Banner Image: Your current banner image is displayed above.

[Select a different banner image/theme](#)
[Upload a custom banner image](#)

Photo: ☒ No Photo ☐ Use Custom Photo
[Change photo](#)

Branding: Jack Sellers
512-779-5237

Colors: ☐ Use theme defaults ☒ Use custom colors

Branding background color: #152f43 Transparency Level: Mostly Transparent

Branding text color: #ffffff

Branding link color: #eac386

Banner background color: #4376a0

Print Footer:

Print Footer: ☒ Yes, I want a Print Footer

[Reset Branding to Defaults](#) [Save](#)

Upload a Photo

Change the color of different elements for your Portal Header











Portal Profile: Under My Information in Settings select “Portal Profile”, then click on the blue line to expand and edit each subject.

My Information



Header & Footer • CMA Cover Sheet • Email Signature • Agent Web Page • **Portal Profile**

Information • Header & Footer • CMA Cover Sheet • Email Signature • Agent Webpage • **Portal Profile**

Your Portal includes a customizable page named 'My Agent' which gives your contacts more information about you. Take the opportunity to stand out! 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.


1	 Photo 
2	 Portal Greeting 
3	 Video 
4	 Inventory Slideshow & Links 
5	 Contact Information 

1. Add Photo you would like displayed in Clients Portal
2. Portal Greeting is the message you want displayed to all your clients
3. Add a YouTube video for your client

 **Video** 

Section Title:

YouTube URL:



4. Add links to your client portal of you and your office's listings
5. Select the contact information you want displayed on your Clients Portal

Adding Contacts

Contacts (Add)

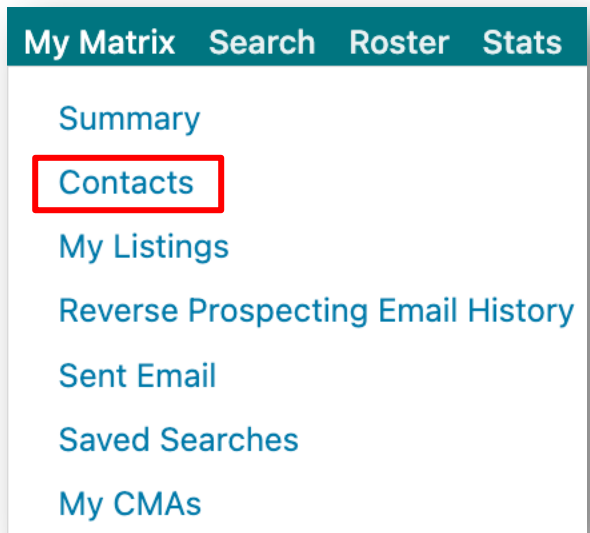
Hover over the "My Matrix" tab from the Matrix navigation menu and select "Contacts."

Click "Add" on the Button Bar.



From "Personal Information," fill out all mandatory fields (indicated in yellow). If you are working with a couple you must put in both email addresses, separated by a comma.

Note: Click "Show All Fields" on the Button Bar to enter additional contact information (optional).

A screenshot of a contact creation form for 'Ashley Boyd'. The form is divided into sections: 'Personal Information' (First Name: Ashley, Middle Name: (empty), Last Name: Boyd, Phone: (empty), Phone 2: (empty), Cell: (empty), Email Address: ashley@haylegal.com), 'Mortgage Pre-Approved' (checkbox), 'Enable Reverse Prospecting' (checkbox), 'Home Information' (Street Address, City, State, Zip, Country), and 'Notes' (text area). At the bottom are 'Cancel', 'Save', and 'Delete Contact' buttons.



Edit Contact: click the "Expand" icon  to open a section panel and view contact management options.

A screenshot of a contact management page for 'Will Burnham'. The page has a header with '2 / 34' and navigation icons. Below the header is a tab bar with 'Details' (selected), 'Auto Email', 'Carts', 'CMA', 'Sent Email', 'Searches', 'Portal Searches', and 'Reverse Prospect'. The main content area shows contact details: Status (Active), Email (wburnham19@gmail.com, laconca@abor.com), Phone, Pre-Approved (No), and Reverse Prospect (Yes). There are sections for 'Recent Activity' (No activity) and 'Activity' (Favorites: 7, Possibilities: 0, Discards: 1, Notes: 7, Saved Searches: 1). At the bottom is an 'Open Portal' button and a 'Delete Contact' button.

Speed Bar & Recent Searches

My Matrix Search Roster Stats Tax Links Finance Market Reports Add/Edit Admin

Enter Shorthand or MLS#

- The Speed Bar is best used for an MLS Number or property address search. You can also search by shorthand criteria in the Speed Bar.
- Use the “Help” icon  for tips on how to format shorthand search criteria.
- Click the “Search” icon  to execute the search.
- Use the following for a quick look-up.
 - MLS# Search **6883265 7214421 4941871** (with or without commas or just add a space between each MLS #)
 - Address is: Only Street # and street Name. No suffix like drive, cove, ect...

AUSTINboard of REALTORS
ACTRIS MLS




My Matrix Search Roster Stats Tax Links Finance Market Reports Add/Edit Admin

6883265 7214421 4941871

Criteria Map Results


Previous Next 1-3 of 3 Checked 0 All None Page

Display Agent Single Line at 20 per page


	#	Listing ID	St	Area	Address	Bd	FB	HB	Gar	Lvl	Yr Blt	Acres	SqFt	\$SqFt	L Price	C\$/SqFt	Close Price	Close Date	DOM
	1	6883265	W	RRE	4332 Teravista Club Dr Unit #59	3	2	0	2	1	2007	0.000	1,775	\$150.08	\$266,400				127
	2	7214421	C	RRE	4332 Teravista Club Dr Unit #61	3	2	0	2	1	2007	0.000	1,791	\$160.25	\$287,000	\$154.66	\$277,000	07/23/2014	108
	3	4941871	C	RRE	4332 Teravista Club Dr Unit #74	3	2	0	2	1	2009	0.000	1,791	\$150.47	\$269,500	\$145.11	\$259,900	10/31/2014	347

Recent Searches

From the “Recent Searches” dropdown menu, located at the top right-hand side of the screen, select which search you would like to view results for.

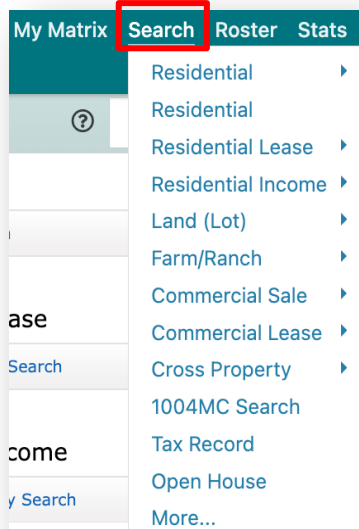
Recent Searches 

- The “Recent Search” dropdown lists up to 50 of your most recent searches.
- The results displayed will be the listings found at the time the search was originally run.

Recent Searches 

Listing ID is one of 6883265, 7214421, 4941871 Re... Residential 2:11 PM	3
Residential Active or Active Under Contract Singl... Residential 1:29 PM	18 Properties
Active Member First Name is like 'bill*'; Member Last ... Member Fri 11:04 AM	1
Street Number Numeric is 105 Street Name is like 'sw... LE 10:00 AM	7

Searching in Matrix



From the Matrix navigation menu, hover over the "Search" tab, select the desired property types from the dropdown list, and click on the link for the type of search to run.

Tips

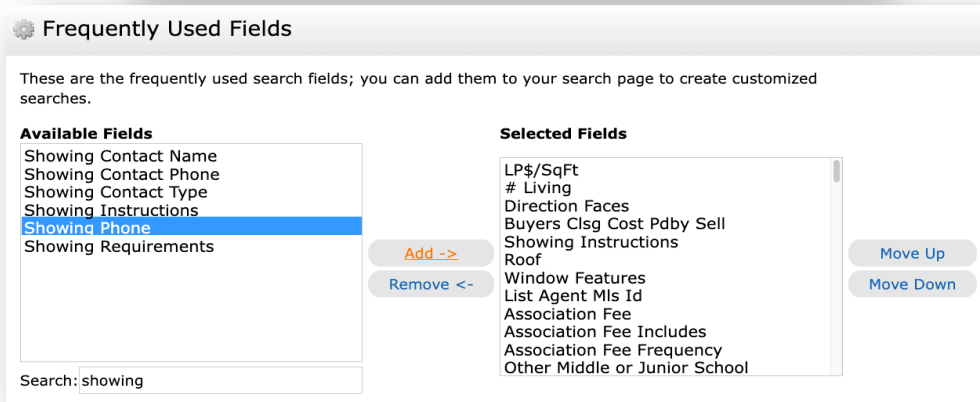
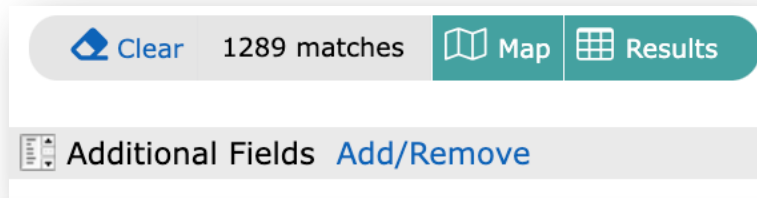
1. Enter the Status & Sub Property Type.
2. Select the Location.
3. Enter price point and property features.


Keep an eye on the "Matches" found as you enter criteria.

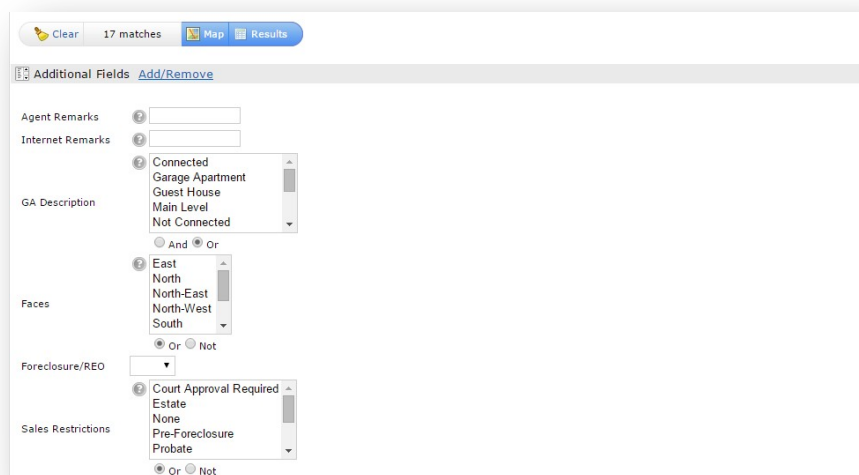
- When searching by Price the (000s) check box ☒ (000s) calculates price in thousands. (e.g. 300+ means \$300,000 and over).
- Use + or - to indicate greater than or less than (e.g. 5+ = 5 or more).
- Select multiple list options by clicking an item while holding down the CTRL key.
- Use the Help icon for a definition or square icon for search specific criteria
- Select the "Or" radio button for search results that contain any of your selected item(s).
- Select the "Not" radio button for search results that do not contain your selected item(s).

Adding Additional Search Fields

The “Additional Fields” option is located at the bottom of the “Criteria” search screen, below the Button Bar.

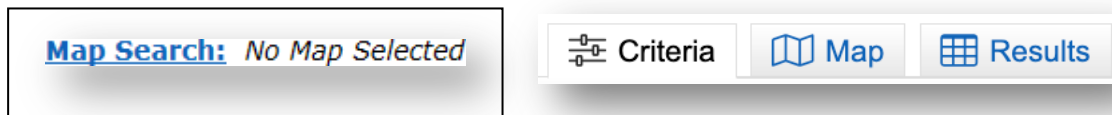


- Use the Search option to narrow the Available Fields.
- Select the field to be added and use the Add button to move it to the Selected Fields”.
- To reorder the Selected Fields, use the Move Up and Move Down buttons.
- **The Back button will save your changes.** 
- To edit your additional fields, use the Add/Remove link on the search criteria screen.

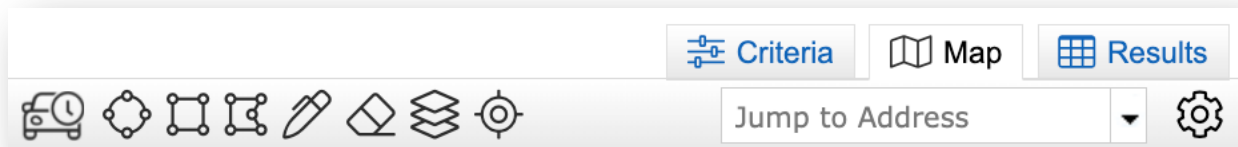






Map Search

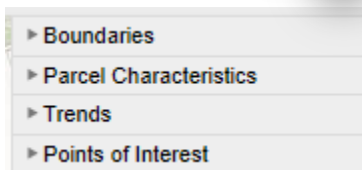
From the Criteria screen, click the “Map Search” link or on the “Map” tab.



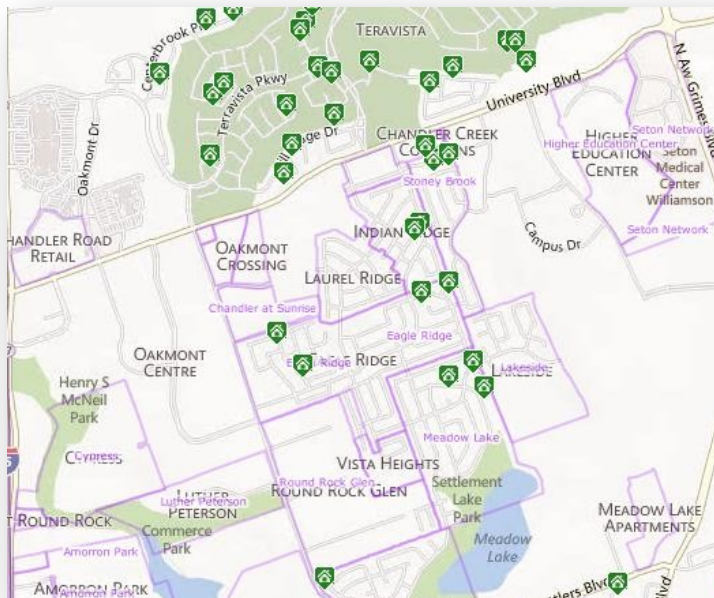
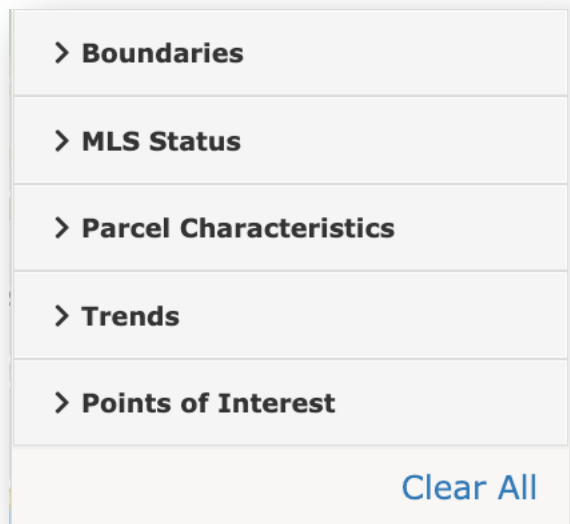
The map tools are located at the top of the Map screen.





- Click and drag the map or zoom in and out to your desired location.
- Use Drive time  icon to filter listings based on real-time driving conditions.
- Use the settings  icon to save your preferred view as a default.
- Use the re-center  icon to bring the map back to the default view.
- Use the “Layers” icon  to choose which of the following layers to activate.

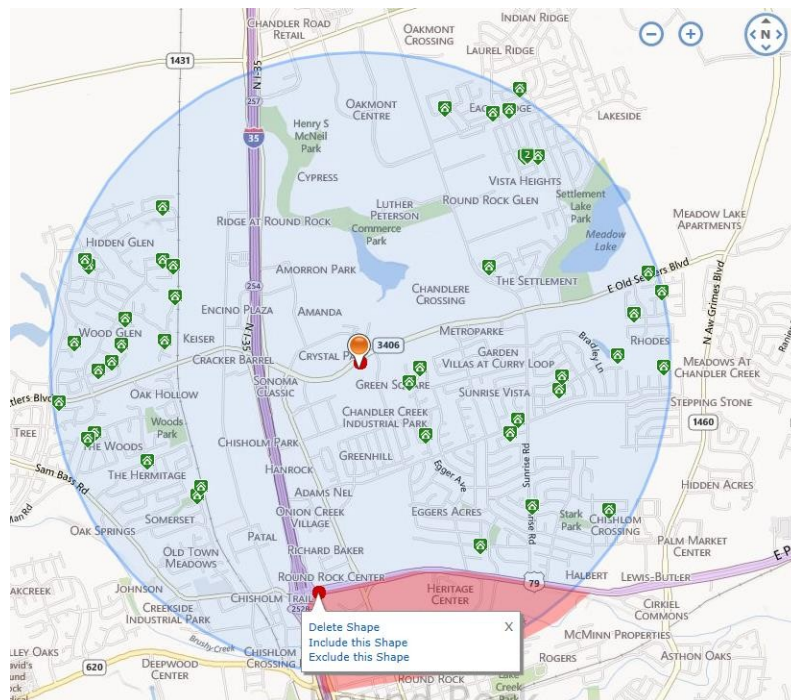



← Click a section panel to expand.

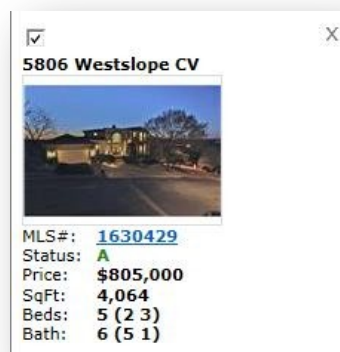




- Use “Jump to Address” to pinpoint a specific address. This is helpful when locating the subject property for a CMA.
- Using one or a combination of all four shape tools  to draw and isolate as many areas on the map as you like.
- Each shape has a Red Dot associated with it that allows you to Delete, Include or Exclude the Shape.
- Clear all shapes by clicking the “Clear Shape” icon. 



- View partial listing details by clicking on any listing marker icon  Click on the MLS# to view the full listing display. Use the checkbox ☒ to select a listing.



Matrix X - Searching Taxing Records

Search Roster Stats

- Residential
- Residential
- Residential Lease
- Residential Income
- Land (Lot)
- Farm/Ranch
- Commercial Sale
- Commercial Lease
- Cross Property
- 1004MC Search
- Tax Record**
- Open House
- More...

Tax Search

Ownership

Owner Last Name:

Owner First Name:

Owner Occupied:

Foreclosure Indicator: ☐ Actively in Foreclosure

Location

House #: Direction: Street Name: Type: Direction: Unit #:

Map Search: No Map Selected

Within 0.5 miles of: My Location

Neighborhood: School District:

Municipality: Building Name:

County:

City:

Zip Code:

Property ID:

Transaction Activity

Last Sale Date (Tax Data):

Last Sale Price (Tax Data): (000s)

Seller Name:

Valuation

RealAVM™ Estimate: (000s)

Assessed Value: (000s)

Characteristics

Bedrooms: SqFt Living:

Baths - Full: SqFt Total:

Baths - Half: Acres:

Year Built: Total Units:

Stories: Pool Y/N:

Land Use (CoreLogic):

Listing Activity

MLS Number:

MLS Status / Date:

Coming Soon: ☐

Active: ☐

Active Contingent: ☐

Pending: ☐

Pending - Taking Backups: ☐

Pending - Over 4 Months: ☐

Sold: ☐

Leased: ☐

Temporarily Off Market: ☐

Withdrawn: ☐

Expired: ☐

Clear 5000+ matches Map Results

Additional Fields Add

Previous

Next

1-20 of 195

Checked 0

All · None · Page

Display

Tax Grid

20

per page

#	S	APN	MLS #	Total Assessed Value	Address	Owner	Rec Date	City	Subdivision	Zip
1		R604830				Tanner Sellers	04/16/2021		Mesa Vista Ranch Ph 2	
2		173655		\$17,283	126 Loggy Byu	Lauren Sellers	09/11/2020	Cibola	Red River Ranch Un 2	78108
3	 	R591541	1975197		345 Empress Tree Dr	Danielle Sellers	06/02/2021	Leander	Caughfield Ph 6	78641
4		R594210			1932 Stirling St	Collin Sellers	01/19/2021	Leander	Bryson Ph 3 Sec 3	78641
5		127835			1392 Highway 71 W Unit #1	Portia Sellers		Bastrop		78602
6		73848			1461 Fm 2571	Kay Sellers		Smithville		78957
7		R166209		\$61,880	127 Drawing Maple St	Diana Sellers	01/22/2021	San Marcos	Paso Robles Ph 3B	78666
8	 	R582989	5765314	\$164,938	703 Hanging Star Ln	Sellers Family Tru	06/18/2020	Georgetown	Sun City Nbrhd 71	78633
9		63828		\$2,144	438 Littig Rd	Mike Sellers		Elgin	Standifer, Elizabeth	78621
10	 	42696	9793408	\$306,013	285 Pine Canyon Dr	Meryl Sellers	08/05/2010	Smithville	Pine Valley Estates	78957
11	 	35504	5660244	\$33,099	325 The Forest Rd	Patrick Sellers	09/03/2020	Dale	Doyle, James	78616
12		28247		\$240,251	1607 Wilson St	Orrin Sellers		Bastrop	Farm Lt	78602
13		26533		\$277,208	1756 Highway 21 E	Hugh Sellers		Paige	Wiseman, Danl M	78659
14	 	24452	6696853	\$61,090	381 Fm 86	Anjanette Sellers	11/20/2009	Red Rock	Carper, Wm M	78662
15		21607	665182	\$338,810	199 Klbj Rd	Edward Sellers	07/29/2019	Smithville	Brook Hurta Sub	78957
16		12029		\$52,994	440 Littig Rd Unit #A	Mike Sellers		Elgin	Standifer, Elizabeth	78621
17		78522		\$690		Anjanette Sellers			Maxamillian, John	

Matrix X (Listing and Tax view)

Previous
Next
1 of 7
Checked 0
All · None · Page
Agent Single Line display
Display Agent Full
at 1 per page

☐ 105 Swallow Cv, Leander, Texas 78641
[Edit Listing](#)

Listing
Tax
Photos
History
Parcel Map
Flood Map
Foreclosure
Remarks
Tour
Open House

Owner Information
[Realist Tax](#)
[Data Currency](#)

Owner Name:	Sellers Tosalyn G	Mailing Zip:	78641
Owner Name 2:	Sellers John J	Mailing Address ZIP + 4	1764
Mailing Address:	105 Swallow Cv	Code:	
Mailing Address City & State:	Leander Tx	Owner Occupied:	Yes
		Carrier Route:	R028

Location Information

School District:	Leander ISD	Old Map:	282-J
School District Name:	Leander ISD	Zip Code:	78641
Subdivision:	Summerlyn Ph P-2	Property Zip4:	1764
Neighborhood Code:	L121405	Carrier Route:	R028
Census Tract:	020301	New Map:	CLN

Estimated Value

Estimated Value:	\$332,100	Value As Of:	10/25/2021
Estimated Value Range High:	\$395,199	Confidence Score:	61
Estimated Value Range Low:	\$269,001	Forecast Standard Deviation:	19

(1) RealAVM™ is a CoreLogic® derived value and should not be used in lieu of an appraisal.

(2) The Confidence Score is a measure of the extent to which sales data, property information, and comparable sales support the property valuation analysis process. The confidence score range is 60 - 100. Clear and consistent quality and quantity of data drive higher confidence scores while lower confidence scores indicate diversity in data, lower quality and quantity of data, and/or limited similarity of the subject property to comparable sales.

(3) The FSD denotes confidence in an AVM estimate and uses a consistent scale and meaning to generate a standardized confidence metric. The FSD is a statistic that measures the likely range or dispersion an AVM estimate will fall within, based on the consistency of the information available to the AVM at the time of estimation. The FSD can be used to create confidence that the true value has a statistical degree of certainty.

Tax Information

APN:	R476124	Tax Year associated with Net Tax:	2021
Alt. APN:	17W3461P20K0560001	Current Year Net Tax Amount:	\$8,616
Parcel ID:	R476124	Block #:	K
Tax Area:	GWI	Lot #:	56
Tax Appraisal District:	GWI	Local Tax Rate Total:	2.8962
% Improved:	80		

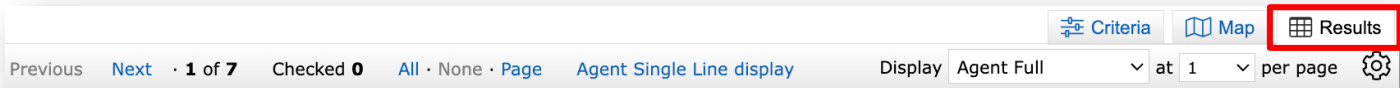
Now you can see tax and listing data together

10 Tabs:


Listing
Tax
Photos
History
Parcel Map
Flood Map
Foreclosure
Remarks
Tour
Open House

Search Results

To view the search results, click the results tab, located at top right-hand side of the search screen, or the results button, located at the bottom left hand side of the search screen.



The following bullet points list the tools available, at the top of the Result screen, from left to right.

- Click **“Previous · Next”** to view the previous or next page of results.
- **ALL** selects all listings, whether visible in the current display or not.
- **None** deselects all selected listings.
- **Page** selects only listings currently visible in viewport.
- Change your display by selecting from the **“Display”** dropdown menu. Return to the single line view by clicking the **“Single Line display”** quick link.
- To view TAX data, switch the **“Display”** to **“360 Property View”** or **“Tax Grid”**
- Change the number of listings displayed per page by using the **“at # per page”** dropdown menu.
- Save changes to your display and/or number of results per page by clicking the Settings  icon.

The listing Information Icons, shown below, are located on the right-hand side of the Single Line display.



View Photos - opens all photos available for that listing.



View Map – Provides a map with a Google Street View option.



Property History – Provides a complete list of status changes and price changes.



Realist Tax – Opens the Realist tax report.



Centralized Showing Service – Click to schedule a Showing!



ShowingTime – Click to schedule a Showing!



Transaction Desk Documents – Click to view, email or download all documents attached to a listing.



Transaction Desk – Allows you to make an offer for that listing.



Down Payment Resources – Provides a starting point to researching down payment assistant programs. This icon only appears when down payment resources are available for that property.



Open House – Upcoming open house information.



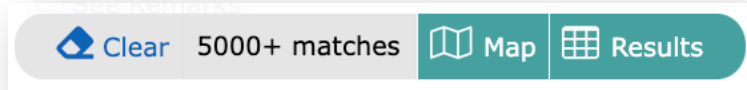
Virtual Tour – Appears when a virtual tour is available for the listing.

Search Related Button Bars

The Button Bar

The “Button Bar” is located at the bottom left hand side of most screens. This guide explains the Search related Button Bars.

Search Criteria Screen



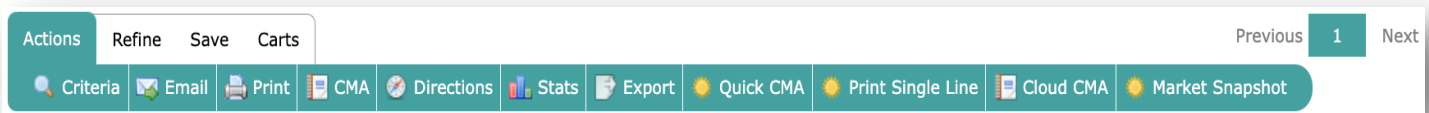
Clear: Removes all current search criteria.

Count-on-the-fly: Displays a real-time number of matches based on the current search criteria.

Map: Switches view to map and displays listings based on the current search criteria.

Results: Switches view to results and displays listings based on the current search criteria.

Search > Results/Map Screen> Actions



Criteria: Return to the search criteria screen.

Email: Email the selected listings as a link to a portal page.

Print: Print the selected listing reports, print to pdf (save as pdf) or email pdf.

CMA: Use the selected listings as comparables in a CMA.

Directions: Create custom, turn-by-turn driving directions using the selected listings.

Stats: Quickly create charted stats based on your selected search criteria.

Export: Export the selected listings as one of several different file types.

Quick Print: Print the Quick CMA or Single Line display.

Cloud CMA: Export selected listings to Cloud CMA.

Market Snapshot: Print a quick report with List vs Sold Price ratios and averages.

Schedule a Showing: Select listings with CSS Showing Instructions to schedule showings.

Quick CMA

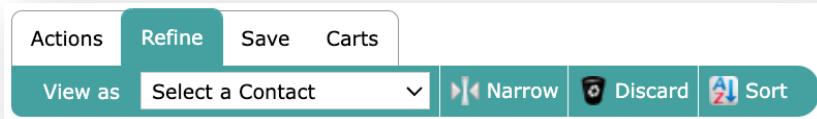
Customer Showing Report

Multi-Map

[illegible]

This is an example of 3 report pages that can be compiled together as a Quick CMA package. You can print, save, or email these pages from the Print option.

Search > Results/Map Screen> Refine



View as: Select a name from the dropdown list to display which listings, if any, have already been sent to that particular contact.

Narrow: displays only selected listings. Use the browser back button to return all listings.

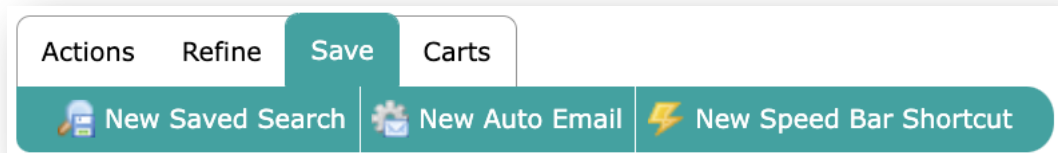
Discard: Remove selected listings. Click “Un-Discard”  to undo this action.

Sort: sort listings by field order (unavailable on Map tab).



Use the “Original Results” link, located at the top left-hand side of the Results screen, to return to the full list of original results.

Search > Results/Map Screen > Save

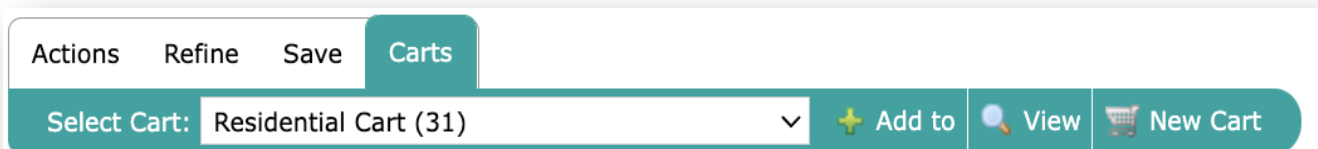


New Saved Search: Save your search criteria to use again for a general search, or for a specific contact. You may also include your search as a favorite on the “My Favorite Searches” Home Page widget. Access all saved searches under “My Matrix > Saved Searches.”

New Auto Email: Automatically send listings, based on selected search criteria, to a specific prospect at scheduled times.

New Speed Bar Shortcut: Create a custom Speed Bar shortcut, based on selected search criteria, to use for quick search results.

Search > Results/Map Screen > Carts



Add to: Add selected listing(s) to cart displayed in dropdown list.

View: View the listing(s) of the cart displayed in the dropdown list.

Note: Listings added to a contact’s cart are not emailed to the contact or added to their Portal.

Emailing Listings to the Portal

Understanding how to email listings to a client's Portal is an important part of taking full advantage of the Portal features. Emailing listings, in this format, allows you and your client to add notes to the listings. It also gives you the ability to track your clients use of the portal.

Search > Results> Actions

Previous

Next

1-5 of 5

Checked 2

All · None · Page

Display

Agent Single Line

at 20

per page

<input type="checkbox"/>	#	Listing ID	St	Area	Address	Bd	FB	HB	Gar	Lvl	Yr Blt	Acres	SqFt	\$SqFt	L Price	C\$/SqFt	Close Price	Close Date	DOM	CDOM	PH	MP	HI	SS	VT	VD	OH
<div><div></div><div></div></div>	<input type="checkbox"/>	1	9138229	A	1B	4511 ISLAND Cv	5	5	1	3	2	1998	0.530	7,755	\$967.12	\$7,500,000				17	17	<div><div></div><div></div><div></div></div>					
<div><div></div><div></div></div>	<input checked="" type="checkbox"/>	2	2351429	A	8E	2705 ISLAND LEDGE Cv	7	6	1	4	2	1999	1.460	10,818	\$923.92	\$9,995,000				36	36	<div><div></div><div></div><div></div></div>					
<div><div></div><div></div></div>	<input checked="" type="checkbox"/>	3	2225129	A	8W	495 Whippoorwill Trl	4	2	1	2	2	1969	7.000	5,133	\$1,412.43	\$7,250,000				21	21	<div><div></div><div></div><div></div></div>					
<div><div></div><div></div></div>	<input type="checkbox"/>	4	5161963	A	BA	1218 Lovers Ln	6	6	1	2	1	2004	10.135	5,293	\$1,228.04	\$6,500,000				29	29	<div><div></div><div></div><div></div></div>					
<div><div></div><div></div></div>	<input type="checkbox"/>	5	3017021	AU	LS	29 Moreh Pass	5	6	2	10	2	2021	25.060	8,434	\$907.04	\$7,650,000				40	47	<div><div></div><div></div><div></div></div>					

Actions

Refine

Save

Carts

Previous

1

Next

Criteria

Email

Print

Print

CMA

Directions

Stats

Export

Quick CMA

Print Single Line

Cloud CMA

Market Snapshot

Email 3 Listings

From: "Jack Sellers" <jsellers@abor.com>

To: Downey Jr., Robert;

CC:

Create a New Contact

☒ Bcc me a copy of this message.

Display: All customer displays are automatically available to your contact. Additional >>

Subject: Custom Search Criteria

Email Body:


Hi Robert,

Here are a couple listings that I hand picked for you that I feel are a great fit. Please let me know by attaching notes and checking them off as a favorite, possibility or trash them.

Please let me know if you need assistance with viewing the Portal.

Characters Remaining: 3732

Signature:



Jack Sellers

ABOR Member Services

512-454-7636

IABS

Edit Your Signature

Tip


In order to track a client's use of the Portal you must add the contact to Matrix. Add a contact on the fly from here.


Creating an Auto Email

The Auto Email will automatically send listings, based on selected search criteria, to a specific prospect at scheduled times or use the concierge mode to approve new listings before they are sent to a prospect.

Click Save at the bottom left hand side of the results screen then click New Auto Email.

☒ Save a New Auto Email


 Recipients

Contact: Sellers, Jack  [Create a New Contact](#)

To: jacksellers.js@gmail.com,j sellers@abor.com (Sellers, Jack)

CC:

☐ BCC me a copy of all emails

 Message

Subject: Dell 20 min RRISD

Welcome Email


Recurring Email

Salutation: [Edit](#)


Message:

Here is a brief introduction about how we'll search properties that best suit your needs. Your MLS "Portal" is a single access point for MLS® listing information.

Within your MLS "Portal", you will be able to sort, categorize and view listings I've found for you, as well as leave me a message with what you liked and didn't like about each one. New and updated listings will be highlighted in YELLOW to help you quickly identify new matches.

Signature: 

[Information About Brokerage Services](#)
[Consumer Protection Notice](#)



Jack Sellers
ABOR Member Services
512-454-7636

Tips

The Subject line will display as a Search Name on the client's Portal.

You can save a custom Welcome Email & Recurring Email template as your default by clicking on the GEAR icon.

Auto Email Settings

Concierge Mode

Settings

Concierge: ☒ Enable concierge mode

Matrix alerts you on the Home Page automatically as new matches are found.

☒ Also send me the alert notifications by email.

☒ Show this contact in Reverse Prospecting results

☐ Enable as a Favorite Search on Home tab (10 maximum)

Tips

Make sure to also send yourself an alert notification by email.

Favorite Searches are best used for personal searches you would like to watch rather than a client's search.

- Enable “**Concierge**” mode to approve each listing before they are sent to the client.
- Receive an email notification when listings need to be approved by selecting, “Also send me the alert notification by email.”

Scheduled Emails

Schedule

☐ ASAP: Emails are sent as soon as possible.

☒ Daily: Emails are sent on the days you choose.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

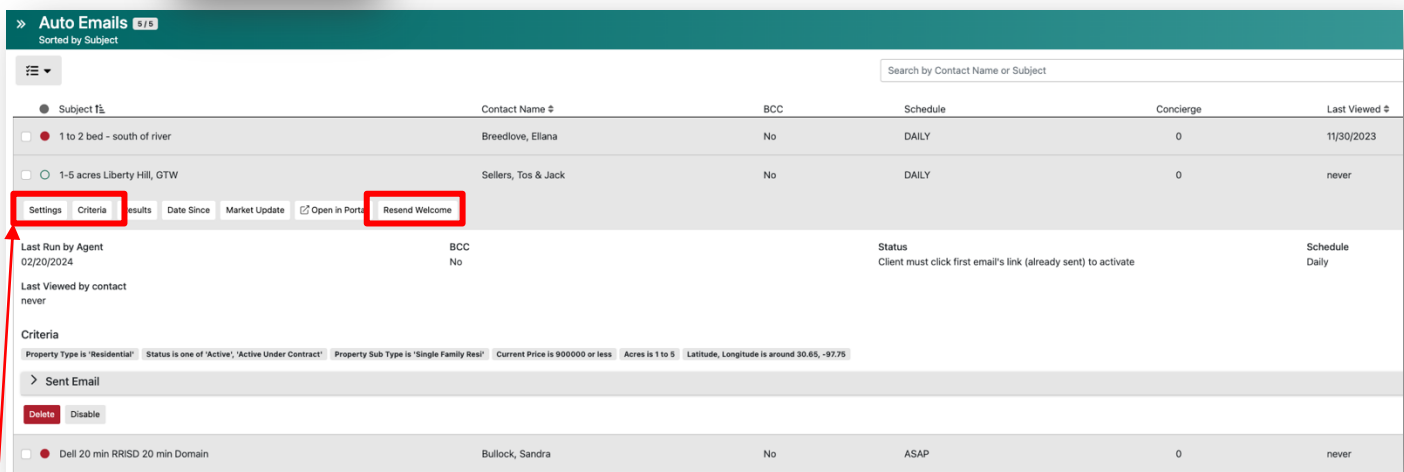
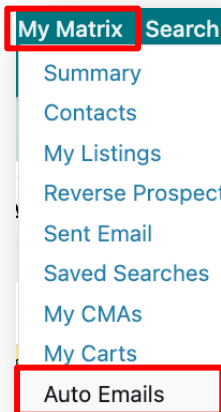
[Clear](#)

☐ Monthly: Emails are sent on the first of the month at midnight.

- “**Schedule**” when this Auto Email should be sent.
 - **ASAP:** Emails are sent as soon as possible.
 - **Daily:** Emails are sent on the days you choose (including AM or PM).
 - **Monthly:** Emails are sent on the first of the month at midnight.

Managing Auto Emails

Use the Auto Emails screen from the “My Matrix” tab to edit and view information regarding your saved Auto Email searches.






Click on the “Subject” (search name) to access the editing options.

The “Settings” option allows you to change the auto-notification subject, message & frequency or enable a disabled Auto Email.

The Criteria will allow you to adjust the original criteria and update it to anything new

The Resend Welcome (email) option is available for one time use if the client lost the original email

-  Activated – The client is active in viewing the results for this search.
-  Inactive – The client has never viewed the results for this search.
-  Disabled – The client has unsubscribed from this search, has not viewed the results for 90 days or the agent has disabled the search.

Search Operators

Searching For	Search Operators
Starts With: wood	wood
Contains: wood glen	*wood glen*
Contains: wood and glen	*wood**glen*
Contains: wood or glen	*wood*,*glen*
Not Starting With: wood	!wood
Not Containing: wood	!*wood*
Range of 200 to 300	200-300
4 or More	4+
4 or Less	4-
30 Days Back	0-30
Date Range	01/01/2013-06/30/2013

1. Searching in Georgetown but wants to exclude the subdivision Sun City
 - a. To exclude a subdivision use this format→ **!*name***

The screenshot shows a search interface with various filters. On the left, there are sections for 'Status - Date or Range' and 'Sub Property Type'. On the right, there are fields for 'Map Search', 'Within' distance, 'St #', 'Dir Pfx', 'St Name', 'St Suffix', 'Dir Sfx', 'Unit #', 'County', 'City', 'Zip Code', and 'Subdivision'. The 'Subdivision' field is highlighted with a red circle and contains the text '!*Sun City*'. The 'City' dropdown is set to 'Georgetown'.

2. Add the field "Agent Remarks" and search for key words

Put the key word inside the asterisk ***xyz***

Searching multiple key words, separate by a comma with no spaces

ie. ***as is*,*fixer*,*upper*,*invest***

The screenshot shows the 'Additional Fields' section with a header 'Add/Remove'. Below the header, there are two fields: 'Pool on Property' and 'Agent Remarks'. The 'Agent Remarks' field is highlighted with a red circle and contains the text '*as is*,*fixer*,*upper*,*invest*'. There is a dropdown arrow next to the field.

3. Remember to **always use the plus + or minus – when searching**
 - a. ie. Beds 3+ they want 3 or more beds
 - b. ie. Square footage 3000- they want 3,000 sqft or less