

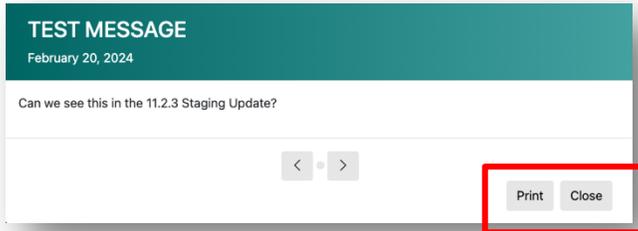
# Introduction to Matrix

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

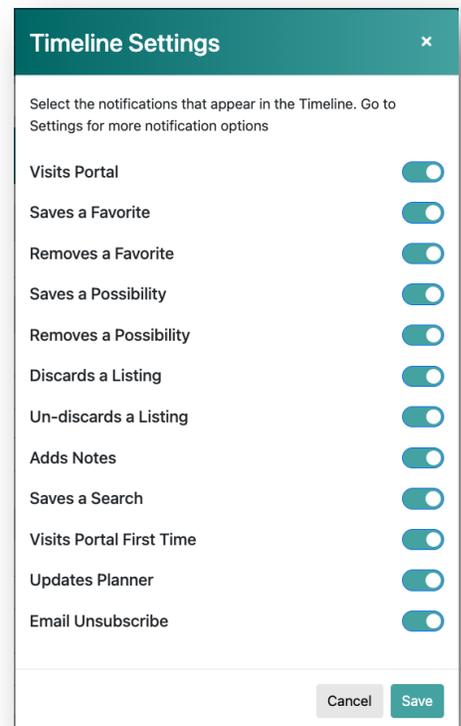
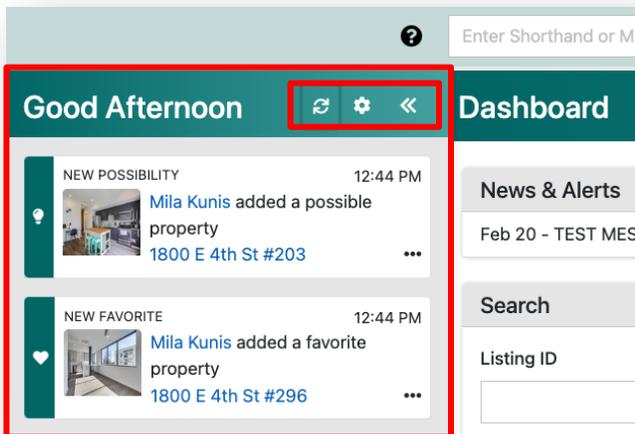
**unlock** **MLS**

# 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.

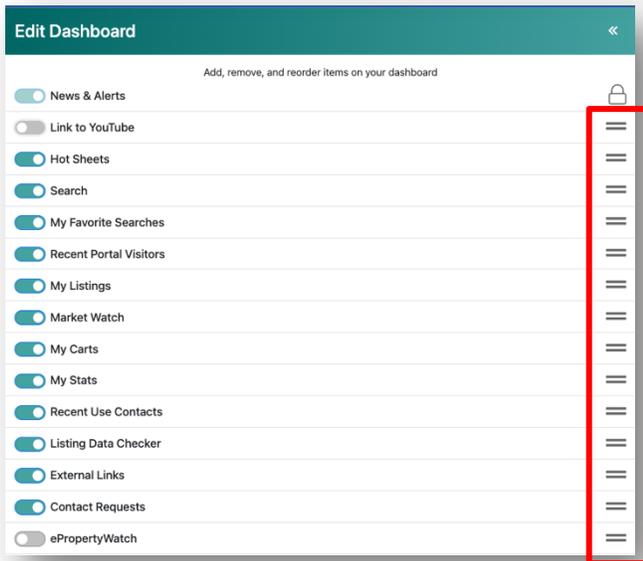
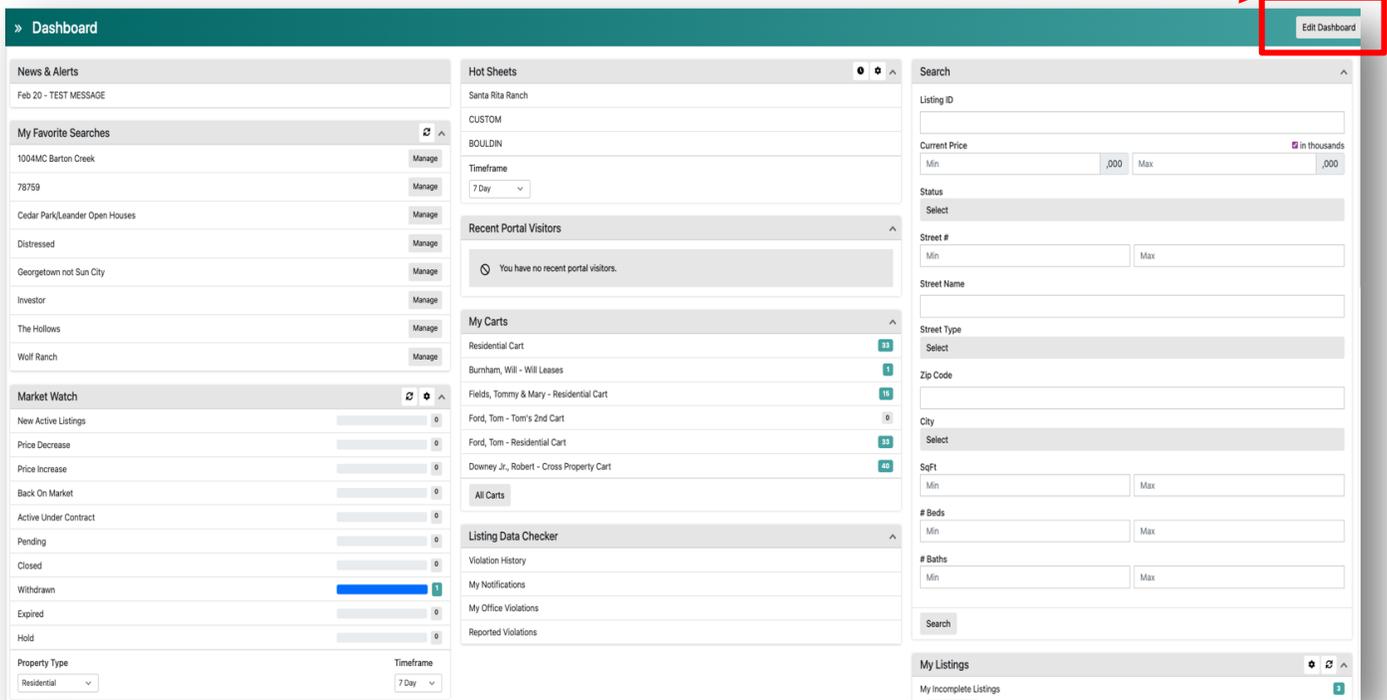
Look at the timestamp in right corner. Click clients name for quick access to that contact. Click the address to open the full listing in another window.

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.

The Search widget interface includes a search bar at the top, followed by a 'Listing ID' field. Below this are several filter sections: 'Current Price' with 'Min' and 'Max' input fields and a 'in thousands' checkbox; 'Status' with a 'Select' dropdown; 'Street #' with 'Min' and 'Max' input fields; 'Street Name' with a text input field; 'Street Type' with a 'Select' dropdown; 'Zip Code' with a text input field; 'City' with a 'Select' dropdown; 'SqFt' with 'Min' and 'Max' input fields; '# Beds' with 'Min' and 'Max' input fields; and '# Baths' with 'Min' and 'Max' input fields. A 'Search' button is located at the bottom.

The My Listings widget interface features a title bar with a settings gear, a refresh icon, and an expand arrow. The main content is a list of listing categories, each with a count in a green badge on the right:

|                                       |   |
|---------------------------------------|---|
| 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 |

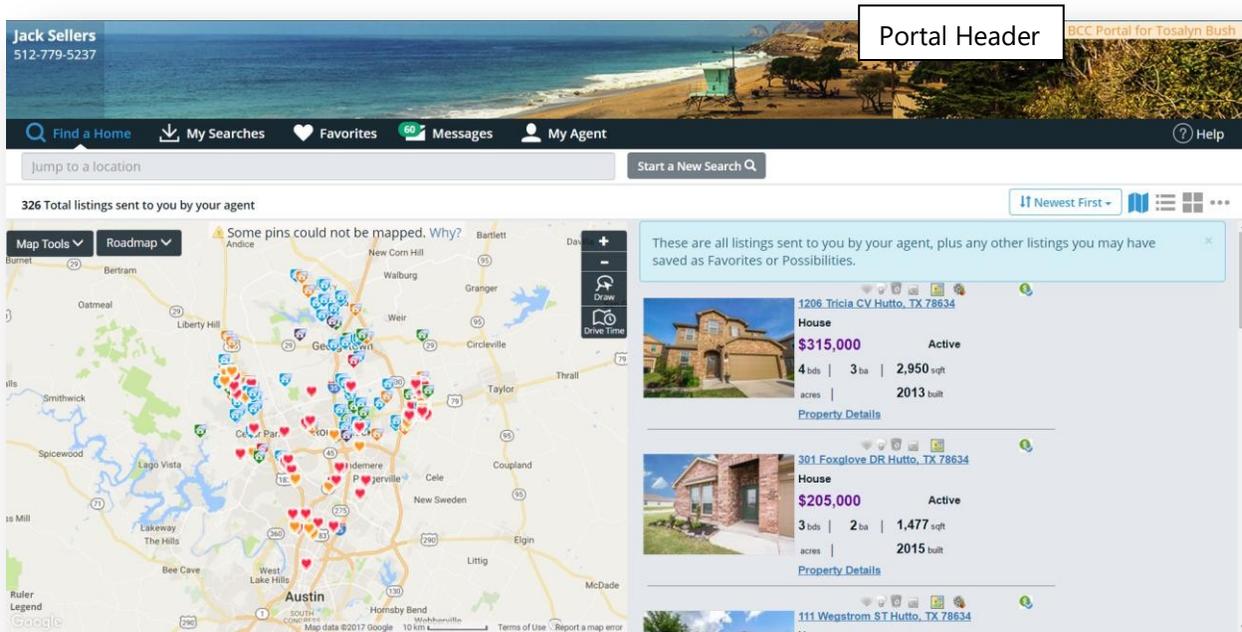
A 'View All' button is positioned at the bottom of the list.

- 
- The External Links widget interface has a title bar with an expand arrow. Below the title is a list of external links, each with a small icon and text:
- Support and Feedback
  - Remine Pro
  - Austin Board of REALTORS®
  - TransactionDesk by Instanet 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

- 
- The Listing Data Checker widget interface has a title bar with an expand arrow. Below the title is a list of items:
- Violation History
  - My Notifications
  - My Office Violations
  - Reported Violations

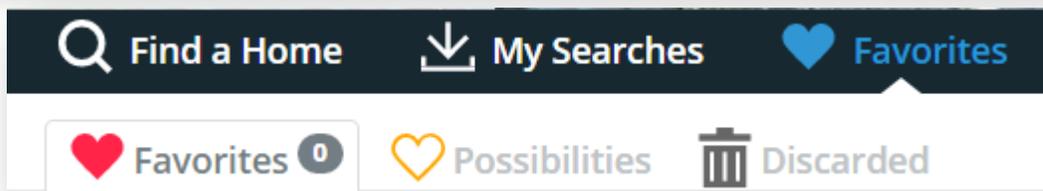
# The Portal

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



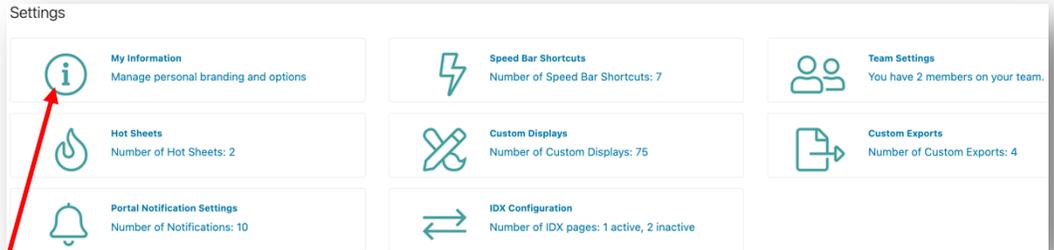
### Tips

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 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 postmaster@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 postmaster@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](mailto:jsmith@noplace.com)

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

Upload a Photo

Branding:

Jack Sellers

512-779-5237

Colors:

Use theme defaults

Use custom colors

Branding background color: #152f43

Branding text color: #ffffff

Branding link color: #eac386

Banner background color: #4376a0

Transparency Level: Mostly Transparent

Change the color of different elements for your Portal Header

**Print Footer:**

---

Print Footer:  Yes, I want a Print Footer

**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:



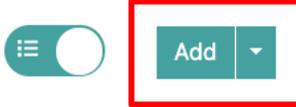
4. Add links to your client portal of you and your office's listings
5. Select the contact information you want displayed on your Clients Portal

# 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 form for 'Ashley Boyd'. The form has several sections: 'Personal Information' with fields for First Name (Ashley), Middle Name, Last Name (Boyd), Phone, Phone 2, Cell, and Email Address (ashley@haylegal.com). There are checkboxes for 'Mortgage Pre-Approved' and 'Enable Reverse Prospecting'. Below this is 'Home Information' with fields for Street Address, City, State, Zip, and Country. At the bottom is a 'Notes' section. Buttons for 'Cancel', 'Save', and 'Delete Contact' are visible.

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

A screenshot of the 'Edit Contact' page for 'Will Burnham'. The page has a teal header with '2 / 34 < >' and '7 Favorites 1 Discards 7 Notes'. Below the header is a navigation bar with 'Details' selected and other tabs: 'Auto Email 1', 'Carts', 'CMA', 'Sent Email 2', 'Searches 6', 'Portal Searches 1', and 'Reverse Prospect'. The main content area shows contact details: Status (Active), Email (wburnham19@gmail.com, laconca@abor.com), Phone, Salutation (Dear Will Burnham), Pre-Approved (No), and Reverse Prospect (Yes). There is a 'Portal' section with 'Recent Activity' (No activity) and an 'Open Portal' button. On the right is an 'Activity' section with a list: Favorites (7), Possibilities (0), Discards (1), Notes (7), and Saved Searches (1). A 'Delete Contact' button is at the bottom right.

# Speed Bar & Recent Searches

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.
  1. MLS# Search **6883265 7214421 4941871** (with or without commas or just add a space between each MLS #)
  2. 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

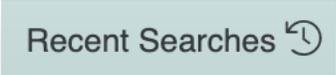
Previous Next 1-3 of 3 Checked 0 All None Page

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.

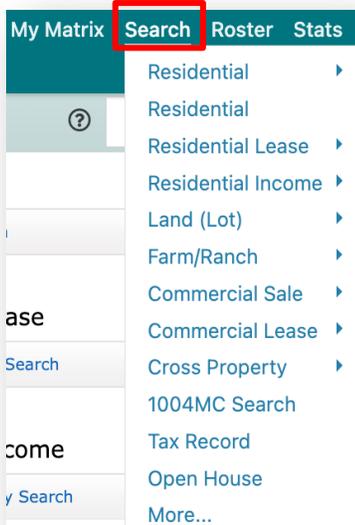


- The “Recent Search” dropdown lists up to 50 of your most recent searches.
- The results displayed will be the listings found at the time the search was originally run.

Recent Searches

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

# 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

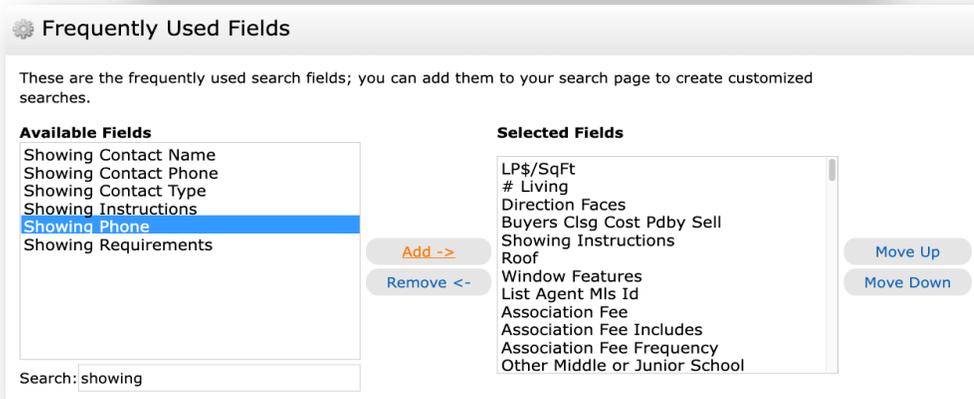
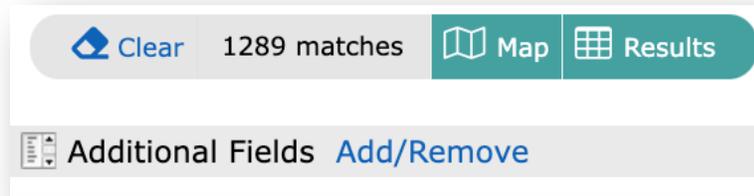
1. Enter the Status & Sub Property Type.
2. Select the Location.
3. Enter price point and property features.

*Keep an eye on the “Matches” found as you enter criteria.*

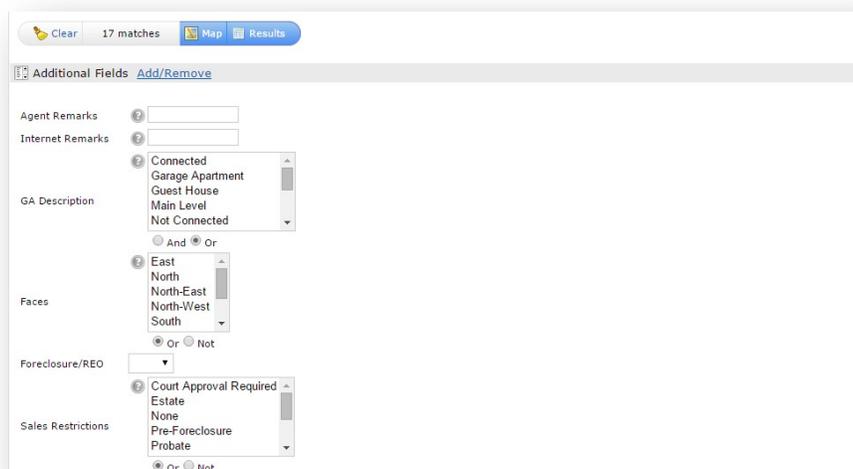
- When searching by Price the (000s) check box  (000s) calculates price in thousands. (e.g. 300+ means \$300,000 and over).
- Use + or - to indicate greater than or less than (e.g. 5+ = 5 or more).
- Select multiple list options by clicking an item while holding down the CTRL key.
- Use the Help icon 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.

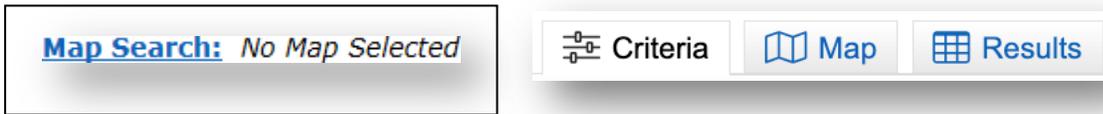


- Use the Search option to narrow the Available Fields.
- Select the field to be added and use the Add button to move it to the Selected Fields”.
- To reorder the Selected Fields, use the Move Up and Move Down buttons.
- **The Back button will save your changes.** 
- To edit your additional fields, use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

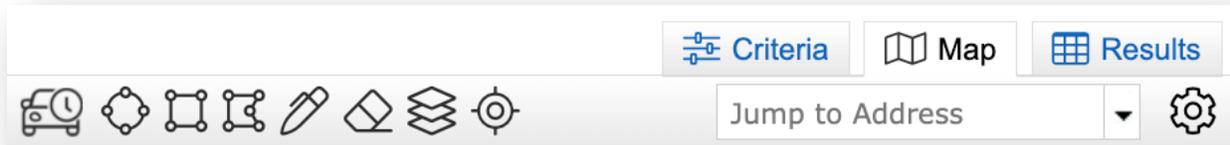


## Map Search

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



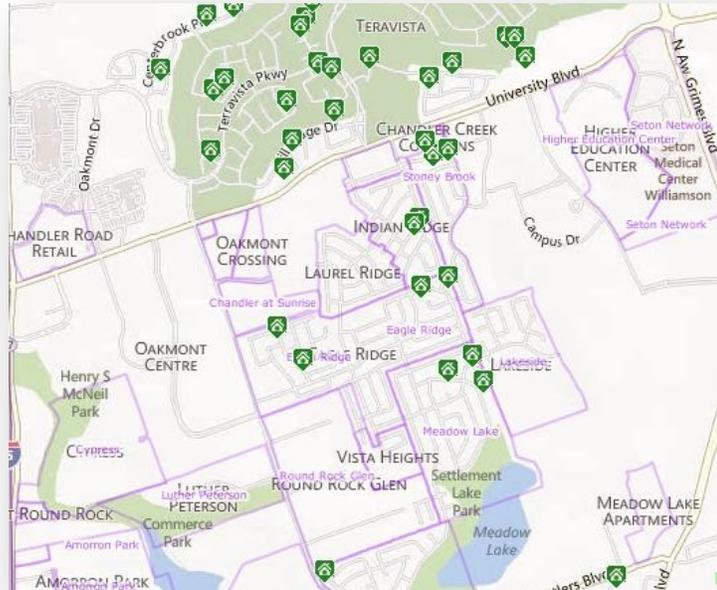
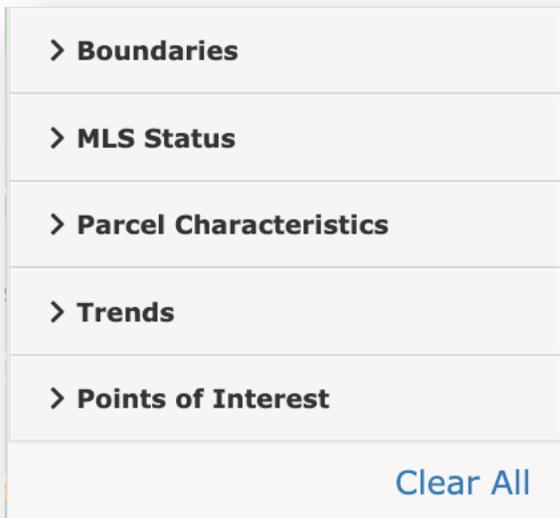
The map tools are located at the top of the Map screen.



- 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.

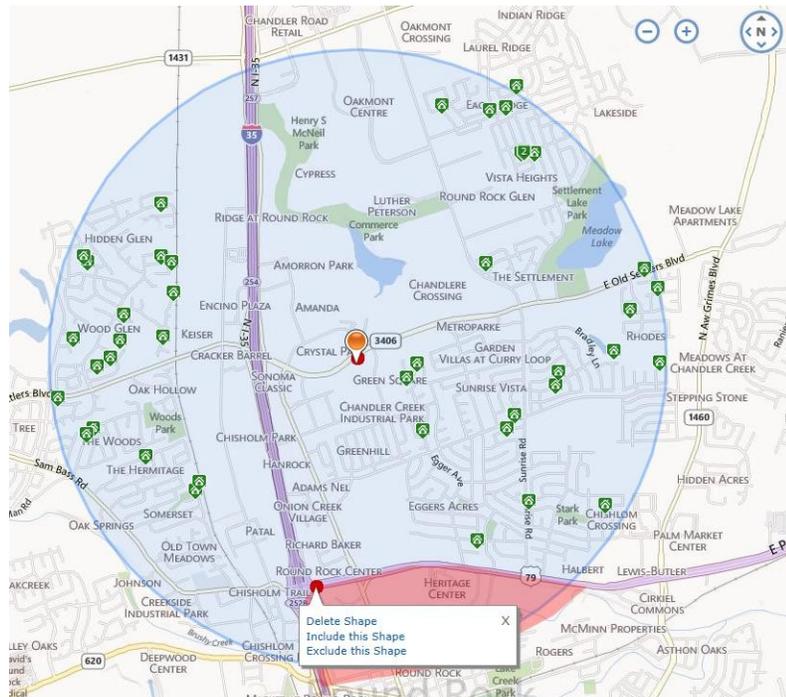


← Click a section panel to expand.





- 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.

X  
**5806 Westslope CV**  
  
 MLS#: [1630429](#)  
 Status: ▲  
 Price: **\$805,000**  
 SqFt: **4,064**  
 Beds: **5 (2 3)**  
 Bath: **6 (5 1)**

# 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

Criteria Map Results

**Ownership**

Owner Last Name:

Owner First Name:

Owner Occupied:

Foreclosure Indicator:  Actively in Foreclosure

**Location**

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

County:

Map Search: No Map Selected

Within 0.5 miles of  My Location

Neighborhood:  School District:

Municipality:  Building Name:

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

**Location Information**

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

**Estimated Value**

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

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

Now you can see tax and listing data together  
 10 Tabs:

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# 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.



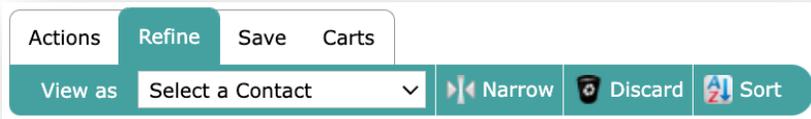
Open House – Upcoming open house information.



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



## Search > 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.

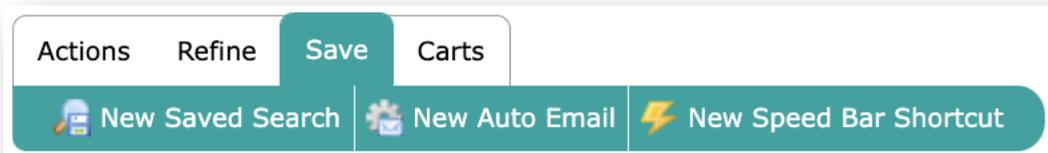
**Discard:** Remove selected listings. Click “Un-Discard”  to undo this action.

**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

| #                                   | 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 |
|-------------------------------------|------------|---------|------|---------|----------------------|----|----|-----|-----|--------|-------|--------|--------|------------|-------------|-------------|------------|-----|------|----|----|----|----|----|----|----|
| <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   |    |    |    |    |    |    |    |
| <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   |    |    |    |    |    |    |    |
| <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   |    |    |    |    |    |    |    |
| <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   |    |    |    |    |    |    |    |
| <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   |    |    |    |    |    |    |    |

Actions Refine Save Carts

Criteria Email Print CMA Directions Stats Export Quick CMA Print Single Line Cloud CMA Market Snapshot

✉ Email 3 Listings

From: "Jack Sellers" <jsellors@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, jsellers@abor.com (Sellers, Jack )

CC:

BCC me a copy of all emails

 Message

Subject:

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.”

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## Scheduled Emails

Schedule

ASAP: Emails are sent as soon as possible.

Daily: Emails are sent on the days you choose.

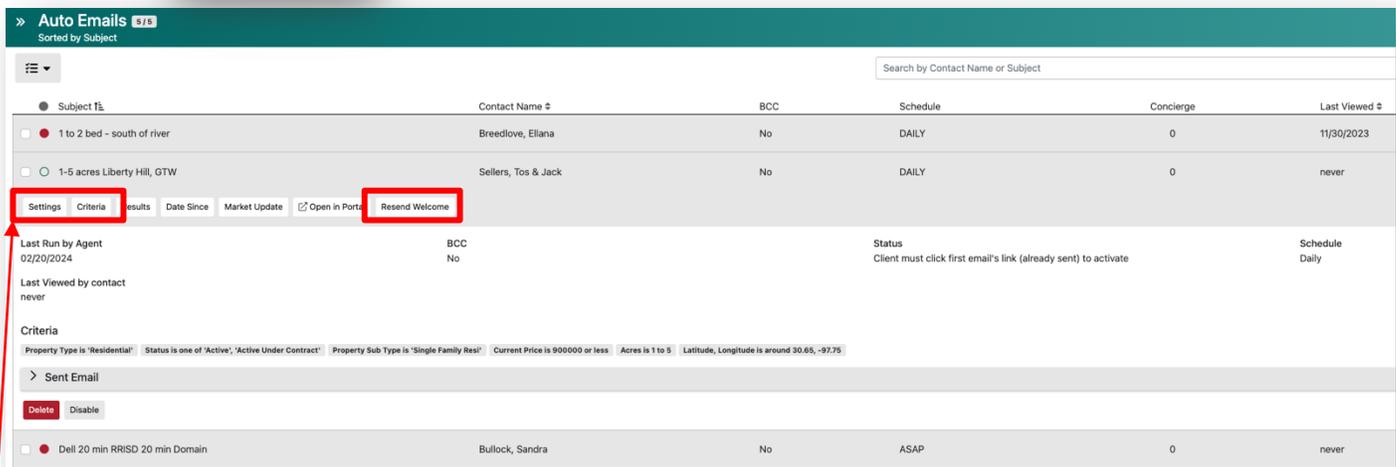
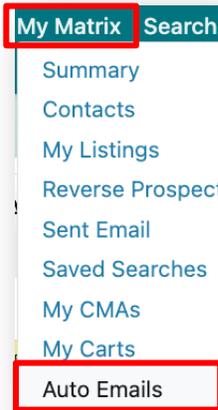
|                                            | Sun                                    | Mon                                    | Tue                                    | Wed                                    | Thu                                    | Fri                                    | Sat    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

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 several sections. On the left, there are filters for 'Status - Date or Range' and 'Sub Property Type'. The main search area includes a 'Map Search' section with a radius of 0.25 miles. Below that are fields for 'St #', 'Dir Pfx', 'St Name', 'St Suffix', 'Dir Sfx', and 'Unit #'. There are also dropdown menus for 'County' and 'City'. A 'Subdivision' field is highlighted with a red circle and contains the text '\*Sun City\*'. Other fields include 'Zip Code' and 'School District'.

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 of a search interface. 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\*,\*u\*'. The 'Pool on Property' field is empty.

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