Intro to Matrix

Home Page Widgets

The home page has a number of sections, called widgets. These widgets can be moved around on the page by dragging and dropping the widget to the location you want it on the home page. You can close a widget by clicking on the X button on the top right side of the widget. Closed Widgets are moved to the "**Additional**" widget. The widgets are:

1. **News**: This widget will always appear at the top left side of the screen, it displays announcements and tips. New announcements and tips will automatically open when you log in. Clicking "**Read** "will close the announcement, but it will remain available in the News widget. Clicking on "**Read Later**" will cause the announcement to pop up each time you login.
2. **External Links**: Contains links to programs that are available to you outside of the MLS; this includes Form Simplicity, MLS Advantage, Listingbook and more.
3. **Search**: This is a basic address search; it will return all listings that match the entered address.
4. **My Listings**: Displays all of your listings, broken down by status. If you have any listings that will expire in 30 or less days, there will be a RED link to view your expiring listings.
5. **My Favorite Searches**: When you save a search, you can select to mark the search as a favorite, if you have done this, the name of the search will appear here. Clicking on the name will take you to the listings that match your saved criteria.
6. **My Stats**: Links to customized Stats that you created in the Stats Module.
7. **My Carts**: Links to listings that you added to your carts.
8. **Recent Use Contacts**: Lists your top ten contacts that you have been working with.
9. **Recent Portal Visitors**: Lists the names of 10 contacts that have visited their portal, provides the date of the last visit and if the contact has marked any the listings as a favorite, possibility or have left you a message. A portal is the landing page when your customer clicks on a link for a listing from an email. In your customer's portal he or she has access to all emails that you sent to them.
10. **Concierge**: Only visible when you have an auto-email set to concierge mode.

Roster Photo

If you want your photo to appear in the roster in Matrix, take the steps below:

1. In Matrix on the blue navigation menu click on "**Input**"
2. Below the Roster heading click on "**Edit Existing**"
3. At the top type in your Agent ID and click on "**Modify**"
4. Click on "**Manage Photos**"
5. On the following screen browse for your photo, select it and click on the blue "**Save**" button.

Personalize your Reports, Emails and Portal

When you print reports from Matrix you can include your photo and contact information. When emailing listings to your customers they too can see your photo and contact information. This is done by setting up a header and footer:

1. In Matrix hover over "My Matrix" found on the blue navigation menu and select "**My Information**".
2. Click on the Header & Footer tab.
3. To choose a header template from the Matrix library click on "Select a different banner image/theme." To add your own custom banner click "Upload a custom banner image."
4. When selecting a template from the library, click on your selection and then click the "**Preview**" button at the bottom of the page.
5. In the photo section select "Use Custom Photo" and click on "**Upload Photo**". Click on "Browse" to locate you photo on your computer, select it, click on Open and click on the "**Save**" button.
6. Under the section "Branding" you can pick up to five lines of information to be displayed on your header.
7. The "Colors" section gives you the option to use the theme default colors associated with the template you chose or to use custom colors of your choosing (click on the **?** icon next to the color you'd like to change to find out more information on how to choose a color).
8. Under the Portal Header area is the Print Footer area where you can choose to add a footer. As with the header you can pick the information to be displayed as well as adjust the colors.
9. When you are done updating your header/footer click the "**Save**" button at the bottom of the screen.

The Customer Portal is the landing page when your customer clicks on a link for a listing from an email. In your customer's portal he or she has access to all emails that you have sent to him or her under the tab "**Messages**." The portal will automatically display the customized header that you set up. It also displays a page titled "**My Agent**" that gives your contacts access to more information about you. The information includes a photo, a greeting, a YouTube generated video, and contact information. To customize the "**My Agent**" page take the following steps:

1. While under the My Information section in Matrix click on the "**Portal Profile"** tab.
2. Click on the appropriate section you would like to add/upload your information to.

3. Checkmark the circle to the right of the section you edited for it to display in your customer's portal.
4. When done click the "**Save**" button.

To add/edit your email signature that displays in all emails you send through Matrix take the following steps:

1. In Matrix hover over "My Matrix" found on the blue navigation menu and select "**My Information**"
2. Click on the "**Email Signature**" tab.
3. When done adding your signature click the "**Save**" button.

Portal Notifications

You can update your portal notification settings through the following steps:

1. Hover over "**My Matrix**">Select "**Settings**">Click on "**Portal Notification Settings**"
2. You can choose to receive notifications for the following activities performed by your contacts:
    a. Visits Portal
    b. Saves a Listing as a Favorite
    c. Removes a Listing from their Favorites
    d. Saves a Listing as a Possibility
    e. Removes a Listing from their Possibilities
    f. Discards a Listing
    g. Un-discards a Listing
    h. Adds a Note
    i. Saves a Search They Created
    j. Visits their Portal for the First Time
3. Checkmark how you'd like to be notified, whether by email and/or text message.
4. If you choose to be notified through text you will have to add your mobile phone number under "Text Notification Settings"
5. When done updating your portal notification settings click the "**Save**" button.

Searching

You can search for listings in each property type, for listings in multiple property types (cross property), offices, agents and open houses. The search screens are very similar and function the same way.

Searching tips:

1. When searching by List Price if you want listings that are $250,000 and less input 250- if you want listings between $250,000 and $350,000 type 250-350. More than 350,000 350+.
2. When searching by any fields that you would input a number into, such as living area, year built, etc. You should input either a range or less than or greater than. For instance, searching by living area you can input a range i.e. 2000-3000, or greater than i.e. 2000+ or less than 2000-

3. When selecting any other status except Active 0-120 will automatically fill into the date range. You can input a different date range either by using the 0-90 format or entering in the date range that you want.
4. When selecting Pending w/ Contingent or Pending **remove** the 0-120 date range that appears. If the range is there the results will not include all listings that are currently pending.

Common search questions:

1. **How do I add additional fields to my search criteria screen?**
   To add additional search fields to the search screen click on the "**Add**" link found at the bottom left of the search screen. From the Available Fields box select the field that you want to include on your search screen and click on the "**Add**" button. Click on the "**Back**" button found at the bottom of the screen when you are done.

2. **What are the 'and', 'or' 'not' options for?**
   Most multi pick fields have the option of 'or' and 'not'. If 'or' is selected any one or more of the selected features will be included in the resulting listings. If 'not' is selected the resulting listings will not have the selected feature(s). When using 'and' the resulting listings will have all of the features you selected.

3. **What is Current Price?**
   The current price field is the price of the listing in its current status. For Closed listings this is the sold price. To search by a sold price range you need to enter this price or range into the current price field.

4. **Is there a way to search by map?**
   You can search using a map by clicking on "**Map Search**" on the search screen. On the top right side of the map you can choose to search by a radius, square or polygon, select the option that you want and click on the map to drop the first point. Clicking again will drop the second point.

5. **How do I save a search?**
   After entering the criteria, from the single line report, click on "**Save**" and Click on "**New Saved Search**". Enter a name in the "Search Name" box and click on the "**Save**" button.

Single Line Display/Basic Functions

From the Single Line Report you can access a number of reports, email listings, print listings, add fields to your Single Line Report, setup auto emails and refine your search.

1. **From the Single Line Report how do I return to the Search screen to make changes without losing the criteria I entered?**
   Clicking on the Criteria tab found at the top right of the screen or clicking on the Criteria button found at the bottom left of the screen will take you back to the search screen with the criteria you entered.

2. **Where can I find documents/Supplements that have been uploaded to a listing?**
   Supplements can be accessed from the Single Line Report by clicking on an icon that looks like three sheets of paper. If a listing has supplements you will see this icon on the Single Line Report

directly to the left of the MLS number as well as on various reports such as the Realtor Report. Clicking on the icon will launch a pop up window that contains links to each of the supplements.

3. **How do I access the Public Records Report for a listing?**
   There are multiple ways of accessing the Public Records report; first from the Single Line Report on the far right side of the screen clicking on the "**TX**" icon will launch the tax report. Secondly you can click on the same icon from various reports such as the Realtor Report or lastly you can click on the **PID** from any of the reports. All of the options will launch the Public Records Report.

4. **How do I change the fields that appear on my Single Line Report?**
   You can add fields on the fly to your Single Line Report, to do this you will need to place your mouse arrow by a column heading name, when your mouse arrow changes to a four pointed arrow, click, and a box will appear in which you will see the option to "**Insert Column**". Click on this option. From the box that appears select the field that you want added to your Single Line Report and click on the "**Apply**" button. The field will now appear on your Single Line Report.

5. **How do I get rid of listings that I don't want in my results?**
   You can remove listings that you don't want to appear on the single line report by checking the listings you want and clicking on the "**Refine**" button and then clicking on "**Narrow**".

6. **Which reports print with a large font?**
   When on the Print screen the reports found below the "**Reports below print as PDF only**" heading print in a larger font. Select any of these reports by highlighting them and click on the "**Print to PDF**" icon.

Custom Single Line Displays

The custom display feature allows you to create your own Single Line displays that contain the fields you want to view. You can select the order, size and labels for each field. You can save your custom displays, print, email, and set one as your default display. There are two ways to create custom Single Line displays, you can change the fields that appear on your search results screen, and you can create Single Line displays from "scratch" in the My Matrix Settings section.

Changing Fields on the Results Screen

On the search results screen you can change the column fields and save these changes by taking the following steps:

1. Place your mouse arrow by a column heading name, when your mouse arrow changes to a four pointed arrow click and a box below will appear. Click on "**Insert Column**".
2. In the Search box type in the name of the field that you want to add. Click on the field or fields and click on the "**Apply**" button. You will now see the field(s) on the Single Line display.
3. **IMPORTANT**: In order for the custom column to be available in the future you must **Save** it. To save the customized display click on the icon that looks like a piece of paper with a pencil. It is found directly to the right of the per page selection. Input a new name in the Display Name box and click on "**Save As a Copy**".

4. This new Customized Single Line Report will now be available in the Display drop-down menu for you to select from.

You can set the custom display that you created as your default column so that when you perform a search and view the results your custom display will automatically appear. To do this, select your saved custom column from the Display drop-down menu and then click on the cog icon.

Creating Custom Single Line Displays from My Matrix

You can create custom columns without performing a search through the My Matrix section by taking the following steps:

1. Hover over “**My Matrix**”>Select “**Settings**”>Click on “**Custom Displays**”
2. From the drop-down menu select the Property Class that you want to create the Custom Display for.
3. Click on the **Add** button.
4. Enter a Display Name.
5. Under Available Columns highlight the fields that you want included and click on the **Add** button, this will move the fields to the Selected Columns Box.
6. Beneath the Available Columns box is a Search box where you can input the name or partial name of the field that you are looking for, i.e. enter the word “price” to get all price fields.
7. You can reorder the fields using the up and down buttons.
8. You can change the name of the field label by highlighting the field in the Selected Columns and entering a new name in the Label field. i.e. instead of “Full Address” enter, “Address”.
9. Once you are done creating your custom display click on **Save**.

Deleting Custom Single Line Displays

To delete a saved Custom Single Line Display you will need to go to **My Matrix**, select **Settings** and then **Custom Displays**. From the drop-down menu select the Property Type of the Custom Single Line Display, i.e. Residential Rental. Click on the name of the Single Line Display and then click on the **Delete** button.

Creating and Exporting Custom Single Line Displays

There are two options for exporting custom Single Line Displays, you can export the Single Line Displays that you saved, or you can create the export from scratch that contains the fields you want to use. To do this take the following steps:

1. Click on “**My Matrix**” and select “**Settings**”.
2. Click on “**Custom Exports**”.
3. From the drop-down menu select the Property Class that you want to create the Custom Export for.
4. Click on the “**Add Export**” button.
5. Enter an Export Name.
6. Under Available Fields highlight the fields that you want included and click on the **Add** button, this will move the fields to the Export Fields Box.

7. Beneath the Available Fields box is a Search box where you can input the name or partial name of the field that you are looking for, i.e. put in “price” to get all price fields.
8. Beneath the Search box, next to Include Column Names, select “**Label**”.
9. Once you are done creating your custom export click on **Save**.

To export listings, you need to perform a search, check the listings you want to export and click on the **Export** button. From the drop-down menu, select the name of Export you created and click on **Export**.

Working with Contacts

Matrix is contact centric, to use the full power of the tools in Matrix, it is necessary for you to add your customer(s) as contacts. By having your customer as a contact in Matrix, every email that you send to your contact is available to your customer in a single location called the Portal. Creating a contact is easy, to do this take the following steps.

1. Click on **My Matrix** and select **Contacts**.
2. Click on the **Add** button.
3. In the Personal Information box, you are required to enter a First Name, Last Name and Email Address. You can select the Salutation that will appear in the emails your customer receives. You can also select whether or not you want Reverse Prospecting Enabled or not***.** Once you have entered the required information, click on the **Save** button.

*****If Reverse Prospecting is enabled, and a listing agent has a listing that appears in the auto email, he or she will know that you have an auto email that has their listing in it. The listing agent does not see any of your customer’s information. This tool is used so that listing agents know that you have a customer that may be interested in his or her listing. The listing agent may choose to email/contact you.

Once you have created a contact and sent emails to your contact, you can view your contact information by clicking on “My Matrix” then “Contacts”.

Clicking on the name of the contact opens the drop-down menu with the option to view the “Portal Activity” which shows when your customer viewed the email(s) you’ve sent. Your customer has the ability to mark listings as Favorites (heart icon), Possibilities (lightbulb icon), and Discards (trash icon) listings. Clicking on the number below these icons will take you to the corresponding listings.

Clicking on the drop-down arrow next to Auto Emails displays the name of the auto email, clicking on the name of the auto email, gives you the ability to change the Settings of the auto email i.e. Frequency and Criteria. Clicking the Open in Portal button takes you to your customer’s portal where you can view the listings you emailed in the same layout that your customer sees.

Auto Emails

The Auto Email feature provides you with the option to have Matrix automatically email your customer when a new listing matches his or her criteria. To create an auto email follow the steps below.

1. In Matrix hover over the Search menu and select the property class that you want to search in, i.e. Residential.

2. On the search criteria screen input your criteria for your customer and click on the **Results** tab found at the top right side of the screen.
3. You will now be on the Single Line Display with your search results. At the bottom of the screen on the Button Bar click on **Save** and then click on **New Auto Email**.
4. You will be brought to a screen where you will need to select a contact from the drop-down menu to send the email updates to, you will need to input a subject for the email, you can input a message if you wish.
5. There are two types of Auto emails, the first type is Concierge, this auto email requires your approval before listings are sent to your customer. When you log into Matrix, you will see a notification if you have any listings that are waiting to be approved to be sent to your customer. The second type automatically sends email updates without waiting for your approval.
6. If you want to approve the listings before they are sent to your customer check the "**Enable Concierge Mode**" box found under the Settings section and skip to step 8. *
7. If you want the listings to go out automatically without any intervention from you, go to the Schedule section and select the frequency you want the emails sent. If you choose ASAP, each time a new listing is added to the MLS that matches your entered criteria your customer will be notified via email. If you select daily your customer will receive a notification each day there are new listings or listings that have had status or price changes that meet your criteria.
8. Click on **Save** to save your Auto Email.

* When using the Concierge option, if there are listings you need to approve to send to your customer you will see a notification in the Concierge Widget found on the Home page.

Help with Matrix

Help can be found under the Help menu in Matrix. In addition, we are always available for you at the board 239-597-1666 or by email support@nabor.com.