

Reference Guide

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Chapter 1: Getting Started

1.1-How To Login and Logout

Matrix is an Internet-based system for searching, emailing and printing listings, as well as doing Market Updates, CMAs and Tax Searches, etc. MLS Matrix is your gateway to the MLS data with advanced features and ability to customize. You can connect to Matrix from any computer with an Internet connection from anywhere, at any time using DSL, ISDN, Cable Modem, or dial-up phone line.

Matrix is compatible with the latest browser versions supported by mainstream operating systems. Retired operating systems and browsers, such as Windows XP and Internet Explorer 8 (IE8), are not supported. All users who are using a previous version of these browsers will be presented with a warning at login to encourage upgrading. Issues related to supported browsers that can't be resolved by upgrading to the latest newer version will be reviewed and resolved on a priority and best-effort basis. CoreLogic will support upgrades to browsers as soon as reasonably practical after the date when the new version of the browser is available for shipment in new retail computers.

Matrix Desktop

Desktop users who choose to use Internet Explorer (IE) on Windows Vista can upgrade as far as IE9. Windows 7 and Windows 8 can upgrade to IE11. Firefox and Chrome automatically update to their most recent versions regardless of underlying operating system. Matrix Desktop supports the following browsers;

- Internet Explorer 9, 10, 11
- And the most recent versions of:
 - o Safari
 - o Chrome
 - o Firefox
 - o Android Browser
 - o Chrome Mobile
 - o Safari Mobile

Matrix Mobile

IPad and Android Tablet users should ensure they're up to date with the most recent version of their browser they can install. Matrix Mobile supports the following browsers:

- IOS Safari
- IOS Chrome
- Android Browser
- Android Chrome

Bugs reported against other platforms (including Windows Phone) will be fixed on a best-effort basis.

Logging into Matrix

Open your Internet Browser and in the address line type [<http://matrix.heartlandmls.com>]. When the login screen appears, type in your MLS ID and Password (Note—password is case sensitive). Then click on the “Login” button or press the “Enter” key.

(Note: Your name and the date will appear in the right-hand side of the title bar. This will display the contact information that appears on all reports generated from Matrix. Therefore, if someone else’s name appears in the right-hand corner, you will need to logout and log back into Matrix with your own user ID and Password.)

1.2-Matrix Navigation Overview

Homepage Dashboard

The Matrix homepage now consists of a customizable dashboard with moveable widgets. Widgets are panels that display content related to a specific aspect of Matrix. These may be arranged and collapsed or expanded as desired by each user; widgets can be re-sequenced to any position in one of three columns on the page

The Header

At the top of the Matrix screen, you will see the Header. The MLS Matrix logo will appear on the left. As mentioned above, your name and the date will appear on the right.

News

Each time you log on to Matrix, take a quick look at the News section to see if there are any new postings. News items contain important information relating to your use of the MLS Matrix system. If you skip them, you will miss important information about system updates, rules changes, new features, system downtime, etc.

Urgent items are sorted to the top of the list, and are identified by an exclamation mark in a yellow triangle. These will remain pinned open on each agent’s dashboard until the agent marks the item as read or to be read later.

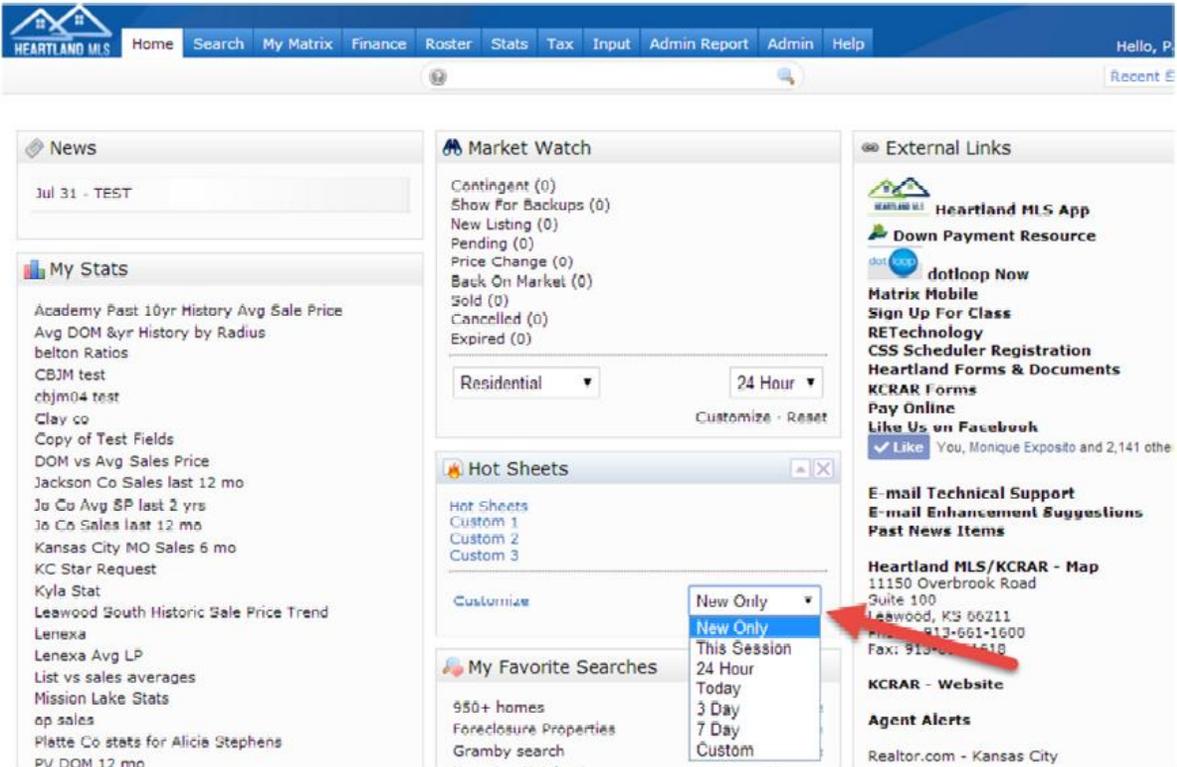
The screenshot displays the MLS Matrix web application interface. A central pop-up window titled "NAR Call for Action" is active, dated October 16, 2015. The text within the pop-up reads: "On Thursday, October 22, 2015, the House of Representatives Transportation and Infrastructure Committee will begin consideration on the surface transportation reauthorization legislation. One proposal would use Fannie Mae and Freddie Mac's credit risk guarantee fees (G-fees) to fund transportation programs. Take action now to prevent Congress from placing an unnecessary long-term burden on American homeowners with a new Transportation Tax. NAR strongly believes that a new tax on homeowners would also prevent Fannie Mae and Freddie Mac from effectively managing their risk. Tell Congress to STOP the Housing Tax for Transportation! Click Here to Access Realtor Action Center." A "Close" button is visible at the bottom of the pop-up. The background shows the website's navigation bar with options like Home, Search, My Matrix, Finance, Roster, Stats, Tax, Input, Admin Report, Admin, and Help. The sidebar on the left includes sections for News & Alerts, Hot Sheets, Recent Portal Visitors, My Carts, and KCRAR Courtesies.

MLS Quick Search/Speed Bar

Each time you log on, you can immediately enter one or more MLS numbers into the search box/Speed Bar which is available just below the menu bar on every Matrix screen. Separate multiple MLS numbers with commas. Click the "Enter" key or click on "Magnifying Glass" link to execute the search. Utilize Speed Bar for quick searches using shorthand such as in the examples below. Quickly revise your criteria as needed right from the results screen. Create and save your own Speed Bar shortcuts for additional frequently used fields. The search bar searches Single Family Residential by default unless you specify a different property type.

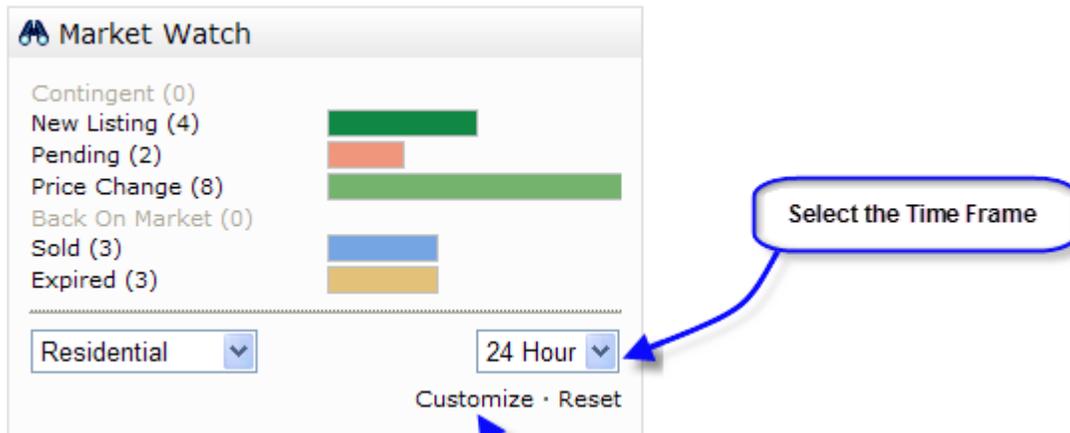
Hot Sheets Widget

This section will not appear the first time you log on to MLS Matrix. It is a section you create and build upon each time you save a search and designate it as a Home Page Hot Sheet.



Market Watch Widget

This new widget on the home page can be set to track listing activity for the selected time frame. Click in the drop down boxes to select a property type and time period. Click Customize to narrow your watch based on any search criteria on the quick search screen. As with all home page widgets, you can remove the market watch or drag and drop it to the location you want on the page.



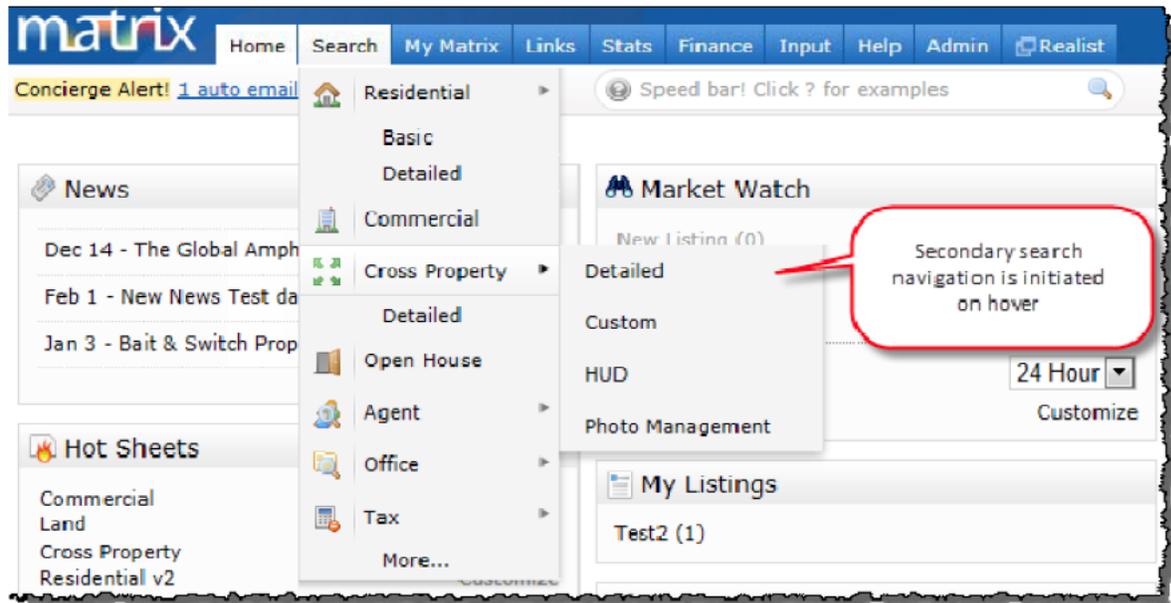
Recent Portal Visitors widget

The Recent Portal Visitors widget (already available on the Matrix homepage) now includes information about a contacts' activity within their portal.



The screenshot shows a widget titled "Recent Portal Visitors" with a user icon. Below the title, it displays the name "Gracey, Cat", the date "2012/06/29", a lightbulb icon, the number "3", and another user icon. A tooltip is shown below the widget, containing the text: "Indicates that Cat added listings to her Favorites and Possibilities buckets. Click on this icon to go to the Portal Activity Page." Below the tooltip, it says "In total, 3 listings were affected".

The Menu Tabs



The Menu Tabs allow you to navigate through the different sections in Matrix. The top menu is geared toward reducing the number of clicks required for navigation throughout Matrix. On hover, users will now see a dropdown menu with navigation selections visible at a glance. The Search menu dropdown has inherited the logic of the search page; it shows all search categories, as well as pinned search forms to make it faster for users to access their most commonly used searches.

Other top menu changes include:

- Clicking on the search tab itself or the “More...” link located at the bottom of the search dropdown will direct users to the search menu page.
- Hovering a search category with a horizontal arrow initiate a secondary fly out navigation window.
- The addition of an icon denoting tabs that re-direct users to an external site, eg:
- The Logout top menu tab has been removed and replaced with a Logout link located next to the user Welcome message.
- The existing sub-navigation bar has been removed as it was made redundant by the new top menu.

Below is a brief description of what is contained in each of the Tabs.

Home tab is the MLS Welcome screen and contains important news, your Hot Sheets (up to 10), Recent Portal Visits, External Links and Favorites Search.

Search tab is used to search for listings in the MLS using a standard search template, or you may create your own.

My Matrix tab serves as your personal briefcase from which you can view your Watched Listings or listing inventory. You can also access your Saved Searches, Market Updates and saved CMAs. You can add clients into your very own contact book. Also, you have the ability to create and change custom single line displays, exports, an email signature and custom headers/footers.

Finance tab contains multiple financial calculators that allow you to do anything from calculating payment schedules to showing the difference between renting versus buying a home. You can also generate charts that go with your calculations.

Roster tab allows you to look up contact information for other agents or offices.

Stats tab allows you to generate charts showing various aspects of market activity. These charts display on the screen and can also be printed and emailed.

Tax tab allows you to search for the public records for properties in Cass, Clay, Jackson, Johnson (KS), Platte and Wyandotte counties. You can run reports and create mailing labels. (Only Missouri counties will allow mailing labels to be printed)

Help tab contains step-by-step instructions for the most commonly performed tasks.

The Main/Body Section

Below the Navigation Bar is the Main/Body section of the page. This is where you will enter your search criteria and view listings. Also, when viewing your search results, your search criteria and the time it took to run the search will also appear here.

The Footer Section

At the bottom of every page you will see the copyright and the “Feedback” link. This is where you can send HMLS suggestions you have for Matrix.

Recent Searches

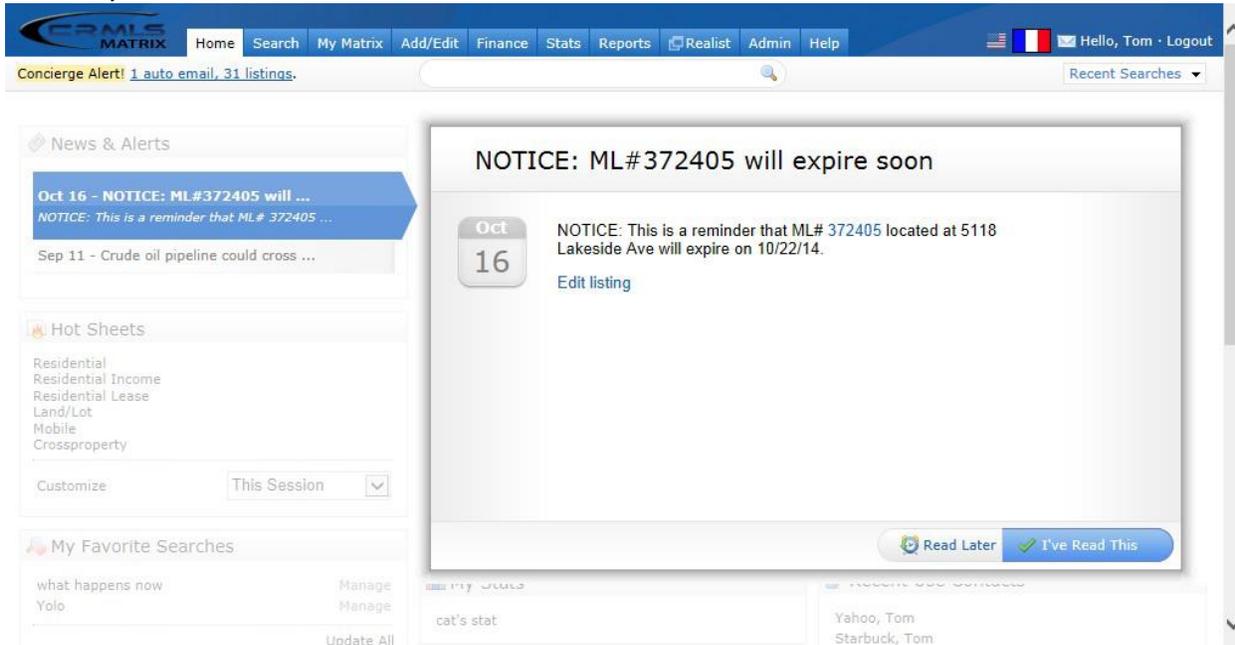
Search History now allows users to quickly and easily retrieve the results of a previous search by using a “Recent” dropdown that is visible throughout Matrix. The standard list will display up to 15 and the View All will display up to 50 past searches. All searches drop off after 7 days.

The screenshot shows the Heartland website interface. At the top, there is a navigation bar with tabs: Home, Search, My Matrix, Finance, Roster, Stats, Tax, Input, Admin Ref. A callout box points to the 'Recent' dropdown menu, stating: "Click on Recent for search history". Below the navigation bar, there is a search bar and a 'Recent' dropdown menu. A callout box points to the dropdown menu, stating: "The drop down list shows the time and number of results. Click on the search to run the search again and display the results." The dropdown menu lists recent searches with details like address, time, and number of results. A callout box points to the 'View All (19)' link at the bottom of the dropdown menu, stating: "View All will display more search criteria and allow you to link to results".

Search Criteria	Time	Results
Active 102 - N=Vivion;S=31st St;E=Antioch ...	12:03 PM	11
Active 425 - N=Co Rd 8;S=Ks Rvr;E=Wy Co Ln;W=Lv ...	12:03 PM	22
Active 204 - Lee's Summit Area Price Range is is ...	12:03 PM	224
Active 330 - ...	11:13 AM	102
Active 330 - ...	9:49 AM	37
Active 330 - ...	9:47 AM	102
Show Y/N Office Show Y/N Active Agent Id is 'glendad'	9:45 AM	1
MLS Number is 1744815	9:41 AM	1
Show Y/N Office Show Y/N Active Agent Id is 'koehlerk'	9:00 AM	1
Active 330 - ...	8:43 AM	101
Latitude, Longitude is within 0.25 mi of 1499195	Fri 5:12 PM	187
Agent Id is 'mcarmean'	Fri 5:10 PM	1
Show Y/N Office Show Y/N Active Agent Id is ...	Fri 5:09 PM	0
Name Last is 'dethloff'	Fri 5:08 PM	4
Sold 330 - ...	Fri 5:04 PM	500+

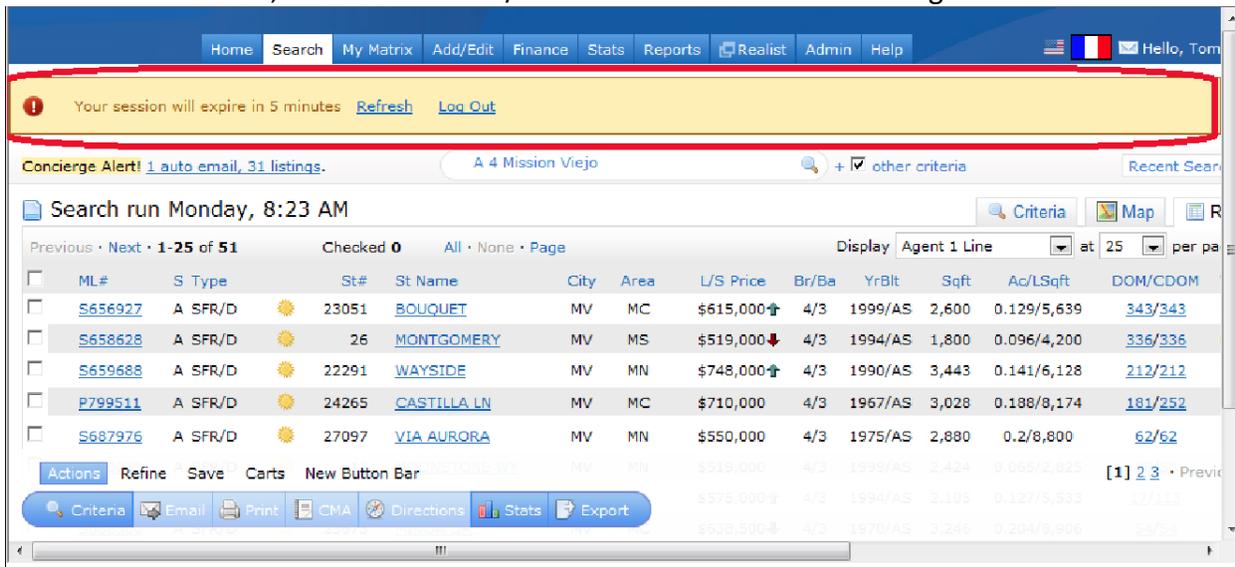
Agent Notifications Alerts

In addition to the existing email for “Soon to Expire Listings” that the listing agent receives, you will now see an automatic alert notification in the News & Alerts area of the Matrix homepage to alert you of such events in addition to the email



Session Timeout Warning Message

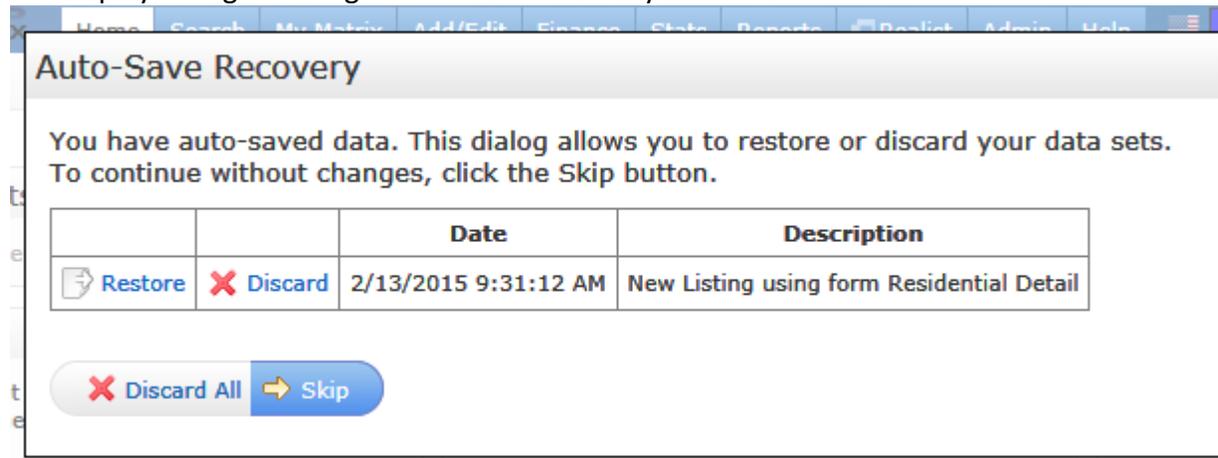
A reminder alert will appear at the top of the screen just below the Menu bar indicating to the user their session will expire in *n* minutes. The number of minutes before the Session Timeout warning messages appears is site configurable. When the user’s session expires they will automatically be redirected to the Login screen. If they have multiple tabs/windows open in their current session, then all windows/tabs will be redirected to the Login screen.



Auto/Emergency Recovery of new listings Input to avoid loss of work

Disclaimer: This is not a failsafe for actually hitting the 'Submit' button on Input. We cannot guarantee that everything will be saved in an input session based on the last time the Auto Recovery feature was run. This should not be considered a reason to never hit the 'Submit' button and should still be regular practice for an Agent to hit 'Submit' if they want their input saved.

- New listings are automatically saved after several minutes if no keyboard input is detected, or when the user navigates away from the Input screen or when switching between Input screen tabs.
- The Auto Save features works for new listings only. Auto Save will not work for edits to existing listings.
- The Auto-Save Recovery screen will automatically be displayed immediately after the user signs into Matrix and displays options to manage listings that had been previously auto-saved. Restore will load the Add/Edit screen with the listing data where the user last left off. Discard or Discard All will delete saved listing data. Skip will proceed to Home page but recovery screen will display at Login as long as Auto Save Recovery data exists.



Log Out

Please click on the word Logout next to your name to end your Matrix session.

Chapter 2: Performing Searches

To search for properties in Matrix, click on the tab at the top of the screen. (**Note:** To search for tax records click on the Tax Tab.)

2.1-Selecting a Property Type

Single Family, Multi-Family, Lots & Land and Commercial Use are the four different property types you can search. There is also a Cross Property section where you can search across all four property types at once. **Please note that Cross Property is intended as a look-up reference only and lacks many of the features of the regular property type searches.** When you first click on the Search tab, you will find these property types and the Cross Property

Search listed in the main/body section as well as in the “Speed Bar” (See Section 6.4) just below the row of tabs.

To select a search, click on a search name just below the property type you want to search. Options include: Quick (basic search fields); Detail (expanded list of search fields available in Single Family and Multi- Family); Address (when searching a specific address or range of addresses); MLS# (search by MLS number only).

2.2-Cross Property Search

If you do not know in which property type a listing is located, or you want to search across more than one property type at once, click on one of the “Cross Property” search links. This allows you to search across all four property types at the same time. Use this option if you cannot find a specific listing or if you are not sure how the agent listed the property.

NOTE: Cross Property is intended primarily as a quick search to find a particular property. To access the full range of Matrix features and reports, bring up the property (ies) in their regular property type after you have found them in Cross Property.

2.3-Searching For Listings

To perform a search, select one of the search template options available (**Quick, Detail, Address, MLS Number**). The search screen will display the basic criteria fields, depending on the search type and property type that has been selected. (**Note:** *Later we will cover how you will be able to customize the template by adding additional search fields. The ability to customize the search template allows you to enter all of your criteria on a single search template screen.*)

There are several different techniques used for entering the search criteria information into Matrix. Detailed descriptions and instructions are provided on the next page for each of these techniques.

2.4-Long List Selection

Subdivision you have an input box. If you already know the codes, you may type them in the box with a comma between each code. For Example County: Ha will return Hallbrook, Hale, Halsey, and Halvira.

Area you will have an input box. Select the area, this will move your item to the Current Selection box. Once you have all the items you want moved to the Current Selection Box, click the “OK” button. The search field will now contain all the codes you selected.

2.5-Regular List Box Selection

The List Box displays a list of searchable items. For example look at the “County” List Box. Use the scroll bar on the right side of the box to view all the items within the list box. In a list box you can select more than one item, see below.

To select or de-select items:

Single Item – To select a single item, click on that item once.

Multiple items – To select more than one item, hold down the **CTRL** Key while selecting the other items.

De-selecting – To De-select an item, hold down the **CTRL** Key while clicking the item to De-select.

2.6-And/Or/Not Options:

And – Will find only listings that match ALL of the Item(s) selected

Or – Will find only listings that match ANY of the Items selected

Not – Will find only listings that DO NOT have the item(s) selected

2.7-Selecting Type

To select one or more Types, you may use the “Regular List Box Selection” method described above.

2.8-Text Box Data Entry

Allows you to enter search criteria. The input box accepts both letters and numbers.

Name fields –Street Name, Letters, Zip Code etc., are examples of name fields

(*) Use the asterisk as a wildcard, or substitute for any portion of the name of which you are unsure.

Example: **WARD*** will search for all listings beginning with **WARD**: Ward

Parkway, Wardman, etc. and then anything after that i.e. Street, Lane, Road, etc.

(,) Use a comma to separate multiple items in a list. Example: **66211, 66214**

Number Fields – The Bedroom field is an example of a **number** field.

You may enter numbers with the following:

- **2** to find exactly two bedrooms
- **2-** to find 2 or less bedrooms
- **2+** to find 2 or more
- **2-5** to find a range from 2 to 5 bedrooms

Date Fields

The List Date, Sold Date, and Contract Date, etc., are examples of **date** fields.

You may enter dates as:

- **4/20/2004** to find April 20, 2004
- **4/20/2004-4/27/2004** to find a range of days from April 20th to April 27th 2004
- **4/20/2004+** to find dates equal to or greater than April 20th 2004
(*Note: The List Date field has the following additional options.*)
- **4+** to find 4 days back from the current date.
- **4-6** to find dates between 4 to 6 days back from the current date.

Negative Search

To exclude a specific item from your search, put an exclamation mark (!) before it. For example, if you want to exclude ZIP Code 66114 from your search, type!66114 in the ZIP Code field. Separate multiple items with commas. For multiple items, be sure to put the exclamation mark before each field.

2.9-Pick List

The Basement Y/N field is an example of a **pick list** field. When you click on a pick list field, a drop down menu will appear with different options. (**Note:** *In a list box you can select more than one item. In a pick list you can only select one item.*)

Radius Search

There is now a radius search available on the search screen. You can enter an MLS number or address and then select the radius distance from a drop down menu. Distances include .25, .5, 1, 2, 5, 10, 15, 25 and 50 miles.

2.10-Map Search

With Map Search, you can draw your own rectangular boundary on a map and search within that area. You are no longer confined to MLS Areas—create your own!

Click on the [Map Search: No Map Selected](#) link on any search screen. This will open a pop-up window with the Map Search interface.

Map Controls

The map is fully interactive. Click the directional links (North, South, East, West) to move the map in those directions. Use the “+” and “-” controls on the left to zoom the map in and out. Use the “Map Size” control at the top to make the map small, medium or large. Click on the “Legend” link for a list of the map symbols and their meanings. Use the radio buttons at the bottom to set map clicks to either zoom in or re-center the map.

Centering the Map

When you open Map Search for the first time, you will find it centered on the Kansas City Metropolitan area by default. There are several ways to move the map to your desired location.

1. **Jump to:** There are a number of preset locations in the “Jump to Address” drop down box. Click the icon next to the drop down box to see the list. Click on the location you want the map to move to.

2. **Find a Map:** You may enter a specific street address or simply a city, state or ZIP Code to center the map on that location (if you enter a city, be sure to include the state too).

Type the information in the input boxes and click the [Find Map](#) button.

3. **Zoom and Direction Controls:** At any point, you can use the zoom controls (“+” and “-” on the left of the map) and direction links (North, South, East, West) to refine the map position.

Setting the Default Start Map

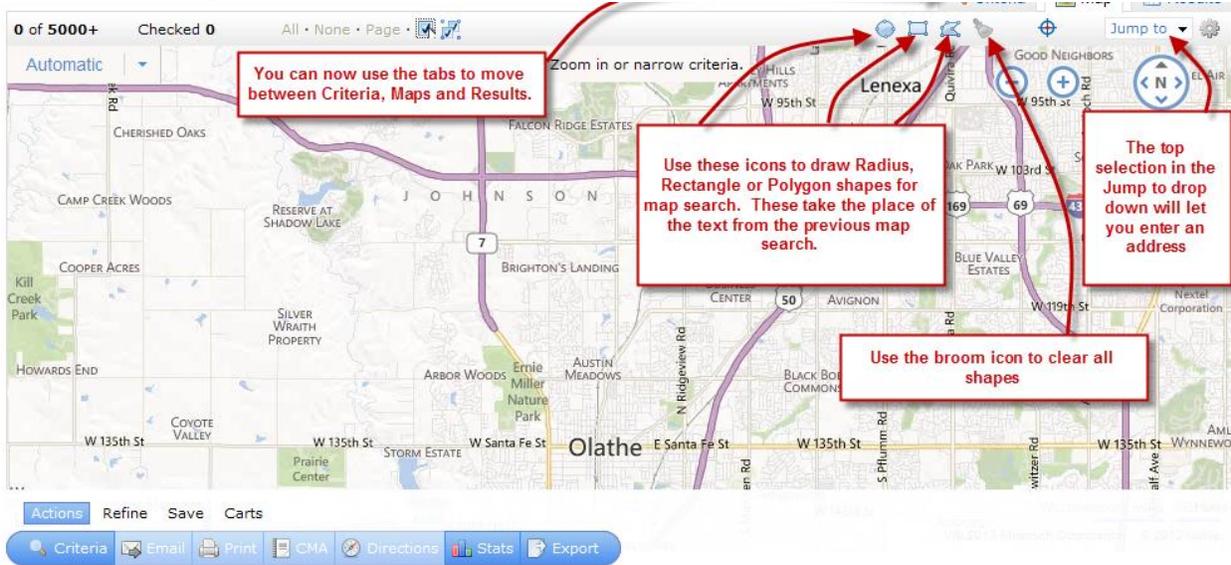
The Kansas City Metropolitan area is the default centering for the start map. If you commonly search a different or more focused area, you can change the default. Move to the area of the map and the zoom level that you want for your default. Click the “Set as start map” above the map. Each time you open Map Search, it will be centered on that location until you change it. If at any time you want to change your default back to Kansas City, click the “Reset start map” link.

Drawing Your Search Area

Once you have the map centered where you want it, you are ready to draw a rectangle on the map to indicate your search area. Move your cursor to the point on the map that will be the upper left corner of your rectangle. Click and hold down the left mouse button. Drag your mouse down and to the right to draw your rectangle. A blue dotted border will appear showing the rectangle you are drawing. When you have completed your rectangle release the left mouse button.

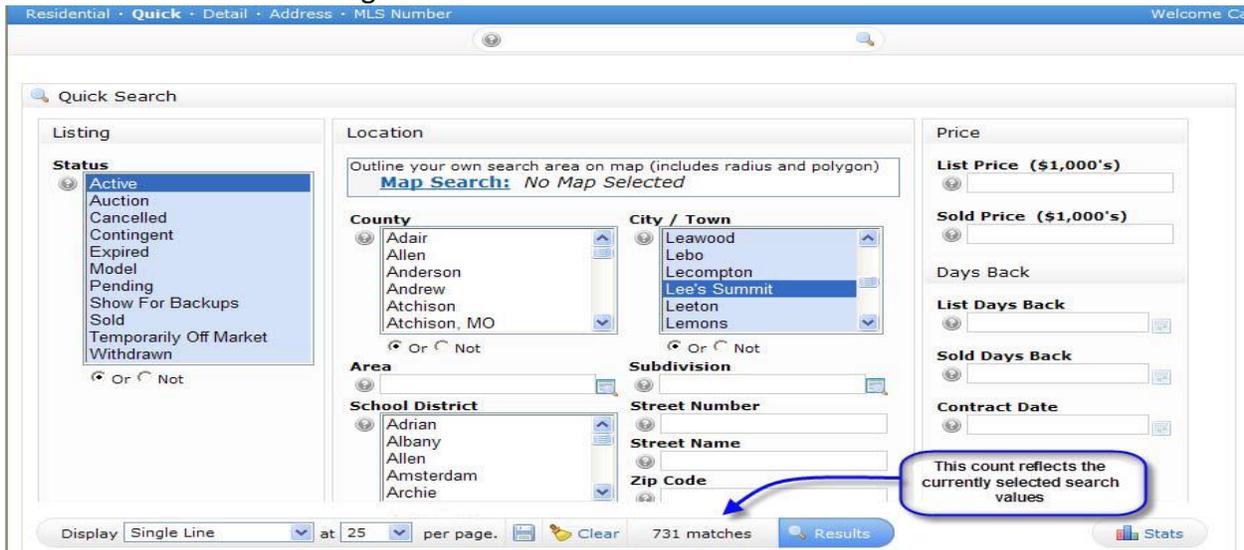
Example: If you want to re-draw the rectangle, click again on the map and start drawing. The original rectangle will disappear. When you have the rectangle positioned where you want it, click the [OK](#) button. The Map Search pop-up box will close, and your search screen will display

the following: Click the “Map Search” link if you want to go back and redefine your search area. If you no longer wish to use the map for this search, click the “Clear Map” button. Otherwise, enter the rest of your search criteria and execute your search. On your search results page, the latitude and longitude coordinates for the search area you drew will display.



2.11-Count on the Fly

When conducting a search, Count On the Fly displays the number of listing that meet the specified search criteria before clicking the results button. As criteria are added or changed, this count is recalculated. This feature enables the refinement of criteria to run a search for a reasonable number of listings.



2.12-Need help?

To obtain **Help** on any field, click on the **?** to the left of the field. **Text Box** fields offer a hover help option, in addition to the **?** help. All you have to do is hold the cursor over the blank fill-in box, and helpful information will appear.

There is now a floating menu bar at the bottom of the screen throughout the system. All of the action buttons are still available but some have been moved on the screen.

You can click on the match count to bring up the screen with your search criteria that used to be accessed through the Count button.

2.13-Results Button/Results Page

Results - When you click on this button, Matrix will process your search and show you the search results. You may also process your search by pressing the “Enter” key on your keyboard.

Search Results Page

Buttons for all actions that can be performed with listing results are found within this hierarchical button bar which remains consistent across result and map views. As a result, Goggles and Carts functionality has been moved from their original locations to the button bar, and the new button categories required the displacement of the page navigation links from the left page border to the right.

1) **Actions** – this button view contains all primary actions users will perform with results

	MLS #	S	Address	Subdivision	Area	Price	Bd	Bth	Plan	L O G
1	1792446	A	20970 W 108th Terrace	Prairie Point	330		4	3	Reverse 1.5 Story	PRME
2	1800701	A	21457 W 107 Place	Prairie Point	330		4	3.1	2 Stories	PRME
3	1788462	A	23296 W 125th Street	Forest View The Meadows	330	\$356,700	Single	4	3	
4	1763921	A	21133 W 108 Terrace	Prairie Point	330	\$357,000	Single	4	3	
5	1787772	A	20879 W 108th Terrace	Prairie Point	330	\$359,950	Single	5	4	2 Stories
6	1792446	A	1078 W 122nd Terrace	Woodland Oaks	330	\$364,000	Single	3	3	Ranch
7	1785942	A	21083 W 114th Terrace	Brighton's Landing	330	\$365,000	Single	4	3.1	2 Stories
8	1792446	A	12300 Carnegie Road	Cedar Creek- Cedar Glen	330	\$365,000	Single	3	3	Ranch
9	1793292	A	10860 S Millbrook Lane	Prairie Point	330	\$366,957	Single	5	4	2 Stories
10	1771933	A	12300 Carnegie Road	Avignon	330	\$367,500	Pat/Vil	3	3	Reverse 1.5 Story
11	1774919	A	12300 Carnegie Road	Avignon	330	\$369,250	Pat/Vil	3	3	Reverse 1.5 Story
12	1801577	A	10852 S Millbrook Lane	Prairie Point	330	\$369,400	Single	4	3.1	2 Stories
13	1790408	A	11395 S Belmont Street	Cedar Creek- Southglen	330	\$369,500	Single	4	4.1	2 Stories

2) **Refine** – this button view allows users to refine the result set

Previous · Next · 1-50 of 65 Checked 2 All · None · Page Display Single Line at 50 per page

	MLS #	S	Address	Subdivision	Area	Price	Type	Bd	Bth Plan	L Ofc
1	1792446	A	20970 W 108th Terrace	Prairie Point	330	\$353,575	Single	4	3 Reverse 1.5 Story	PRME
2	1800701	A	21457 W 107 Place	Prairie Point	330	\$354,775	Single	4	3.1 2 Stories	PRME
3	1788462	A	23296 W 125th Street	Forest View The Meadows	330	\$356,700	Single	4	3.1 2 Stories	PKC 06
4	1763921	A	21133 W 108 Terrace	Prairie Point	330	\$357,000	Single	4	3.1 2 Stories	PRME
5	1787772	A	20879 W 108th Terrace	Prairie Point	330	\$359,950	Single	5	4 2 Stories	PRME
6	1796273	A	20078 W 122nd Terrace	Woodland Oaks	330	\$364,000	Single	3	3 Ranch	KW01
7	1792718	A	21083 W 114th Terrace		330	\$365,000	Single	4	3.1 2 Stories	RLEX01
8	1792718	A	11005 S Glenview Lane		330	\$365,000	Single	3	3 Ranch	RAN 03
9	1792718	A	Brook Lane		330	\$366,957	Single	5	4 2 Stories	PRME
10	1792718	A	Carriage Road		330	\$367,500	Pat/Vil	3	3 Reverse 1.5 Story	RAN 03
11	1792718	A	Carriage Road	Avignon	330	\$369,250	Pat/Vil	3	3 Reverse 1.5 Story	RAN 03
12	1801577	A	10852	Prairie Point	330	\$369,400	Single	4	3.1 2 Stories	PRME
13	1794408	A	11395	Cedar Creek- Southglen	330	\$369,500	Single	4	4.1 2 Stories	CCR

Actions Refine Save Carts [1] 2 · Previous · Next

View as Select a Contact Narrow Discard Sort

3) Save – this button view provides all Save functionality

Previous · Next · 1-50 of 65 Checked 0 All · None · Page Display Single Line at 50 per page

	MLS #	S	Address	Subdivision	Area	Price	Type	Bd	Bth Plan	L Ofc
1	1803516	A	24268 W 109th Terrace	Prairie Brook	330	\$429,900	Single	5	4.1 1.5 Stories	CBAD11
2	1769370	A	26762 W 100th Place	Cedar Creek-Villas/Shadow G	330	\$426,235	Single	3	2.1 Reverse 1.5 Story	CCR
3	1777806	A	24160 W 112th Terrace	Cedar Creek- Southglen	330	\$387,322	Single	5	4 2 Stories	CCR
4	1780048	A	10760 S Cedar Niles Circle	Cedar Creek- Shadow Highlan	330	\$550,000	Single	4	4.1 2 Stories	CCR
5	1780048	A	Barth Road	Cedar Creek- Southglen Woc	330	\$481,370	Single	4	3.1 2 Stories	CCR
6	1790408	A	Belmont Street	Cedar Creek- Southglen	330	\$369,500	Single	4	4.1 2 Stories	CCR
7	1790408	A	108th Street	Cedar Creek- Shadow Highlan	330	\$829,500	Single	5	4.1 1.5 Stories	CCR
8	1802654	A	26692 W 109th Street	Cedar Creek- Shadow Highlan	330	\$679,500	Single	5	4.1 1.5 Stories	CCR
9	1802711	A	10640 S Glenview Lane	Cedar Creek- The Estates	330	\$649,500	Single	5	4.2 Reverse 1.5 Story	CCR
10	1802757	A	26220 W 108th Street	Cedar Creek- Shadow Highlan	330	\$495,000	Single	4	3.2 1.5 Stories	CCR
11	1802834	A	26995 W Shadow Circle	Cedar Creek-Villas/Shadow G	330	\$519,900	Pat/Vil	4	3 Reverse 1.5 Story	CCR
12	1795444	A	26263 W 111th Terrace	Cedar Creek- Cedar Glen	330	\$475,000	Single	5	4.1 1.5 Stories	CRWN03
13	1753983	A	11162 Whitetail Lane	Cedar Creek- Cedar Glen	330	\$645,000	Single	5	4.1 Reverse 1.5 Story	FRG

Actions Refine Save Carts [1] 2 · Previous · Next

New Saved Search New Auto Email New Speed Bar Shortcut

4) Carts – this button view provides access to all cart actions

Previous · Next · 1-50 of 65 Checked 0 All · None · Page Display Single Line at 50 per page

	MLS #	S	Address	Subdivision	Area	Price	Type	Bd	Bth Plan	L Ofc
1	1803516	A	24268 W 109th Terrace	Prairie Brook	330	\$429,900	Single	5	4.1 1.5 Stories	CBAD11
2	1769370	A	26762 W 100th Place	Cedar Creek-Villas/Shadow G	330	\$426,235	Single	3	2.1 Reverse 1.5 Story	CCR
3	1777806	A	24160 W 112th Terrace	Cedar Creek- Southglen	330	\$387,322	Single	5	4 2 Stories	CCR
4	1780048	A	10760 S Cedar Niles Circle	Cedar Creek- Shadow Highlan	330	\$550,000	Single	4	4.1 2 Stories	CCR
5	1780174	A	11673 S Barth Road	Cedar Creek- Southglen Woc	330	\$481,370	Single	4	3.1 2 Stories	CCR
6	1790408	A	11395 S Belmont Street	Cedar Creek- Southglen	330	\$369,500	Single	4	4.1 2 Stories	CCR
7	1790408	A	W 108th Street	Cedar Creek- Shadow Highlan	330	\$829,500	Single	5	4.1 1.5 Stories	CCR
8	1790408	A	W 109th Street	Cedar Creek- Shadow Highlan	330	\$679,500	Single	5	4.1 1.5 Stories	CCR
9	1802757	A	S Glenview Lane	Cedar Creek- The Estates	330	\$649,500	Single	5	4.2 Reverse 1.5 Story	CCR
10	1802757	A	26220 W 108th Street	Cedar Creek- Shadow Highlan	330	\$495,000	Single	4	3.2 1.5 Stories	CCR
11	1802834	A	26995 W Shadow Circle	Cedar Creek-Villas/Shadow G	330	\$519,900	Pat/Vil	4	3 Reverse 1.5 Story	CCR
12	1795444	A	26263 W 111th Terrace	Cedar Creek- Cedar Glen	330	\$475,000	Single	5	4.1 1.5 Stories	CRWN03
13	1753983	A	11162 Whitetail Lane	Cedar Creek- Cedar Glen	330	\$645,000	Single	5	4.1 Reverse 1.5 Story	FRG

Actions Refine Save Carts [1] 2 · Previous · Next

Add to View Cart: My Residential (34)

2.14-Display Results

Before you run a search, Matrix lets you customize your results' display. Located directly below the default search criteria fields you will find the following two pick lists options:

1. Number of Listings to be displayed per page

Located to the far left within the light blue bar. To control the number of listings that will appear on the Search Result screen, select the number of listings to be displayed from the "Show per page" pick list. Depending on the Screen Display Template you choose, you can have **10, 25, 50 or 100** listings per page. Once you select a number and execute a search, Matrix will retain that number until you change it from this pick list.

2. Screen Display Template

Located to the immediate right of the "Show per page" pick list. The "Display" pick list contains a list of display formats that are available. When you first go into Matrix you will see the system default template of **Single Line** Display. To select a Screen Display Template click on the down arrow and then click on the display template you would like to use as your default display.

(Note: Once you create and save your own column reports, they will appear at the top of this list with my: in front of the name of the report. Setting up your own column reports is covered in Chapter 18: "Manage Column Reports" section of this manual.)

2.15-Saving your Default Search Criteria

You can set up default search criteria. For example, if you do the majority of your business in Area 340, you can save that as your default. After you have done this, Area 340 will automatically be selected every time you enter the search screen.

To save your default criteria:

- 1) Select the search criteria that you would like to establish as your default.
- 2) Click on the [Set Default Criteria](#) link below the basic input fields. The criteria you have entered will now be saved as your default. They will automatically be selected every time you use this search template. You can change your default criteria by clicking the [Clear](#) button to the right of the [Search](#) button, and repeating steps 1 and 2.

Clear - When you click on this button all of your search criteria, including your default search criteria, will be cleared from the current screen.

(Note: This clears your default criteria and any additional criteria entered only for this search session. The next time you run a search your default criteria will return unless you save the cleared template as the default).

When you click this link it will display all of the criteria you have currently entered. This is located under the basic search fields to the right of [Set Default Criteria](#) link.

Chapter 3: Customizing Your Search Screen

3.1-Adding Search Fields

If you want to setup a search using additional criteria not included in the basic template, use the **Additional Used Fields**. This allows you to add as many additional fields as desired. Taking advantage of this feature will save you time and effort. This feature allows you to create a single template that contains all your desired search fields.

To add additional search fields:

This feature is located beneath the default search fields.

- 1) Click on [Click here to add/remove other search fields](#) link.
- 2) In the **Available Fields** box, select the field(s) that you want to add to your search.
- 3) Double click the field name or Click on the **Add** button.
- 4) This will move the highlighted field to the **Selected Fields** box.
- 5) Repeat this process until you have all the search fields that you want. (**Note:** *To select more than one field at time, hold down the **CTRL** Key while selecting the fields*).
- 6) When all the search fields you want are in the **Selected Fields** box and you have them in the order that you want them to appear, click on **“Back”** button under the **Available Fields** box.

To remove additional search fields:

- 1) Click on the [Click here to add or remove other search fields](#) link at the bottom of the screen.
- 2) In the **Selected Fields** box, select the field that you want to remove.
- 3) Click on the **Remove** button.
- 4) This will move the highlighted field to the **Available Fields** box.
- 5) Repeat this process until you have removed all the search fields that you would like.

To change the order of the selected fields:

- 1) Click on the [Click here to add or remove other search fields](#) link at the bottom of the screen.
- 2) Click on the field in the **Add/Remove** box that you want to move.
- 3) Click the **Up** or **Down** buttons to move the selected field within the list.

When all the desired search fields are in the **Selected Fields Box** and in the order you want them to appear, click on the **“Back”** button under the **Available Field** box. This will return you to the search criteria screen. Scroll down to the bottom of the search screen area to view the search fields that you have added. They will appear in the **Additional Used Fields** area of the screen. Every time you return to the Search Template and want to add or remove more search fields, follow the above steps.

Chapter 4: Navigating the Search Results

4.1-Navigating the Single Line Search Results

At the top of the search results display page, just below the blue navigation bar, Matrix will display the following information:

Results 1-10 of 23

- **1-10** means you are viewing the first set of 10 matching listings
- **23** represents the total number of matching listings

(**Note:** *Remember from above you can select 10, 25, 50, or 100 listing per display page.*)

If there is more than one page of listings, use these links to navigate:

- **Previous** – Takes you to the previous page of listings
- **Next** – Takes you to the next page of listings
- **Numbers** – Advances to a specific page

4.2-How to Use the Icons

Selecting & De-selecting single listings

To select a listing that you would like to email, print, etc., click anywhere in the line of data for that listing. Once you do this, a check mark will appear in the check box to indicate that you have selected that listing. To deselect the listing, click anywhere on the line again and the check mark will disappear, indicating that the listing is no longer selected.

Selecting & De-selecting all the listings on the page

To select all the listings on the current page, click in the first check box at the top of the page in the column header. This will put a check mark in all the boxes on the current page, indicating that they are all selected. If you click in the check box at the top of the page again, the check mark will disappear from all the listings, indicating that none of them are selected.

Selecting & De-selecting all Search Results Across Multiple Pages

To select all the listings in your search results, click the “Check all...” link at the top of the page. This will put a check mark in all the boxes all your search results, indicating that they are all selected. To de-select them, click the “Uncheck all...” link. The check mark will disappear from all the listings, indicating that none of them are selected.

Watched Listings∞

To the right of the check box is a Watched Listing icon ∞. Matrix allows you to keep a list of listings that you want to track/monitor.

(Note: The Watched Item(s) list will be stored in the My Matrix tab.)

To add a listing to your Watched Item Summary:

1) Click on the ∞ Watched Listing icon to the left of the listing that you want to add.

A window will open to let you know that you are now watching this listing. This means the listing has been added to your Watched Item Summary list under the My Matrix tab. You now have the option of attaching a Contact to this Watched Listing. If you do not want to attach this listing to a contact, click on **Close** . This will close the window and take you back to the search results screen without attaching this listing to a contact.

To attach this listing to a Contact:

1) Click on the name of the **Contact** you would like to attach the listing to.

2) Click on the **Attach Contact** button.

Matrix will then attach the selected contact to the listing and you will be returned to the Search Results screen. When you view your Watched Listings under the My Matrix tab, it will display the Contact’s name that you attached to the listing. This helps you keep track of which listings you are watching for who. You must track and email changes to your client manually. There is no automatic tracking or emailing with the Watched Listings function.

To View a Photo

The camera icon (with a plus sign over it), to the left of the listing indicates that the listing has at least two photographs. If there is a camera icon with no plus sign, then there is only one photograph. If you do not see any camera icon, the listing does not have a photo at this time. To view the photo of a listing, click on the camera icon to the left of the listing. A window will open showing you the MLS number, address and all photos for that listing. Click any photo to view a large version. To view the photos of another listing, click on the camera icon to left of the other listing. Click on **Red X** in the top right-hand corner of the Web browser photo window to close the window and return to the search results screen.

Single Line Display: Price Change Icon

For Active Status listings only, a price change icon will display next to the List Price on the Single Line Display if the List Price has changed by at least half a percent in the last seven days. If the List Price is less, a red down arrow will display. If the List Price is greater, a blue up arrow will display: Click on the icon to view a pop-up window that displays the original, prior and current price and the last price change date. After seven days without an additional price change, the icon will automatically drop off the listing.

To View a Listing on a Map (Microsoft Virtual Earth)

To view the location of a listing on a map (using Microsoft Virtual Earth), click on the globe icon to the left of the MLS Number. A pop-up window will open containing the Virtual Earth map in “map view.” To make the map bigger, click the Maximize button (upper right next to the red X) and the map will automatically resize.

1. Push pin shows the location of the property. Mouse over the push pin for a thumbnail pop-up of listing information and photo.
2. Zoom control: click and drag the slider towards + to zoom in or towards – to zoom out.
3. Select Road (default), Aerial (photographic flyover view) or Hybrid (photographic flyover view with street name overlay). If you have dragged the map so that the subject property is no longer at the center, you may click “Re-Center” to bring the subject back to the center of the map.
4. The “map view” icon is selected by default. Click the “bird’s eye view” icon below it to switch to the bird’s eye view (see below for more information).
5. Click the > arrow on the right side of the tool section to open a flyout mini-map showing the area covered. Click and drag anywhere in the mini-map to move your focus. Click the diagonal arrow in the lower right corner of the mini-map to make it larger or smaller. Click the “R” (upper left) for Road View (default) or the “H” for Hybrid View. Click the < arrow on the right side to close the mini-map.

Printing

To print any of the maps, select File>Print... from the menu bar or click the printer icon (both at the top of the Web browser pop-up window).

Bird’s Eye View

When you switch to the Bird’s Eye view, the mini-map will automatically open. See page two for information on the mini-map. To close it, click the < arrow on the right side (it is closed in the example above). There are two levels of zoom. Zoomed out is the default. Move the zoom slider to the + sign to zoom in (as in the example above). The map looks North by default. To change the direction of the view, click any of the compass points (below the zoom control).

To view the location of a different listing, click on to the left of the MLS Number on another listing. Matrix will then show you the location of that listing. Click on the **Red X** in the top right-hand corner of the Web browser map window to close the window and return to the Search Results screen.

4.3-Sorting the Search Results

If you have 500 or fewer search results, Matrix will automatically sort them first by Status, then Area, then List Price (all in ascending order).

If you have 500 or fewer search results, you can do your own custom sort using the **“Refine”** button at the bottom of page. You can perform multi-level sorts and choose ascending or descending order. Matrix has an extensive set of Sort tools available. Please refer to Chapter 7: Sort Search Results for detailed instructions.

4.4-Listing Detail

To view listing details, click on the listing’s MLS number to display the complete listing information. Please refer to Chapter 5: Navigating the Detail Screen for detailed instructions.

4.5-Listings Cart

Allows you to save listings and combine them with listings from other search results.

Each property type has its own cart, so you cannot combine cart contents across property types (unless you are using the Cross Property search/cart). Select the listings you want to save to the cart and click the “Add to Cart” link (located both above and below your search results). You can add up to a maximum of 200 listings to the Cart. You now have three links. The “View” link also tells how many listings are saved in the cart. Click to view the saved listings. To add additional listings, select them and click the “Add To” link. One of the major benefits of this tool is that you can run however many additional searches you wish and add more listings to the cart (combining them with listings added from other searches). To completely empty out your cart, click the “Remove Checked” link. A pop-up box will ask you to confirm whether you want to empty it. Once you click “OK” to confirm, you cannot undo it. Listings will stay in your cart indefinitely until you empty the cart (even if you log out and log back in later). Once you have all the listings you want in your cart, click the “View” link. From the cart contents, you can perform all the same functions you do with regular search results (sort, print, email, map, export, stats, etc.). To remove listings from your cart, select them and click the “Remove Checked” link. To go back to your original (or revised) search results, click the link at the top of the screen. Note: You can Save the search from your cart and it will save the narrowed criteria (i.e. only the listings in your cart), not any of the original search criteria. If there are listings in your Cart, it is also accessible by clicking the Search tab, then the Cart link.

4.6-Previous/Next/Page Numbers

At the top of the Listing Detail screen you will see the navigation links.

The navigation is a little different on the Listing Detail screen than on the Listing Results Screen. The following explains what each of these items represents:

(Results 4 of 79) - You are viewing the **fourth** of **79 Listings**

(Check All 79) - Selects all listings in the search results.

(Previous) - Takes you to the previous listing.

(Next) - Takes you to the next listing.

[1,2,3,\[4\],5,6,7,8](#) - Takes you directly to a particular listing by clicking on the actual number.

[\[4\]](#) - Listing currently being viewed.

[...](#) - Takes you to the next set of 10 listings. If the Icon appears before the numbers, click it to view the previous set of 10 listings.

[Single Line Display](#) - Takes you back to the Single Line Display screen.

[Add To Cart](#) - Adds listings to your Cart.

4.7-CDOM

To view the Cumulative Days on Market (CDOM) for a property, click on the “CDOM” link next to the regular Days on Market. A pop-up window will open displaying the CDOM along with a link to information on how CDOM is calculated. CDOM is available through this link on the Property Detail display only. It is not available on any reports of email displays. It is intended as an agent tool only.

4.8-History

Click the “History” link (next to CDOM) for a pop-up window that displays the history of price and status changes for this property. As with CDOM, this information is linked on the Property Detail display only. You can also search property transaction history by clicking on the History tab (see Chapter 23 for more information).

4.9-Viewing the Tax Record

Matrix allows you to quickly view the associated tax record for the listing. The Property ID (PID) number is on the right side of the screen under the map, in the section labeled Tax Information in the listing information. The PID number will be linked (blue underlined) if it is in the greater Twin Cities or western Wisconsin areas where HMLS has tax data. If you click on the PID number, a window will open to show the tax record for the property. If the number is not linked, tax records for that county are not available. In order for the link to work, the PID number must be valid. If you click on the link and the listing agent did not enter a valid Property ID number, a window will open letting you know that Matrix could not find the tax record.

4.10-Display Template

There are a number of standard templates that you can select for displaying the listing information such as: Single Line; Thumbnail; Property Full; Property Short; Customer Full; Customer Condensed; Customer Short; Customer Single Line; Customer Thumbnail. In addition to these you have any single line custom displays that you have saved in Matrix. (Adding your own single line custom displays is covered in Chapter 18 “Custom Displays”.)

Just below the blue option buttons you will see the following **Display** pick list.

Use this pick list to change the way the listings are displayed on your screen.

To change the way the listings are displayed on your screen, follow these steps:

1) Click on [Property Full](#)

2) Click on the display template you want.

Matrix will automatically show the listing information in the display format you chose. Repeat these steps to view other available formats.

Any custom displays that you have designed will appear in this pick list at the top with “my:” in front of the name of the report.

4.11-Search Criteria Display

At the bottom of every Search Results page, you will find listed the search criteria that resulted in the displayed listings and the sort order (if 500 or fewer listings).

Search time: 0.39 sec

Search Criteria: Status is *Active*

Type is *Single*

List Price is *200000 – 250000*

Area is *340*

Ordered by *Status, Area, List Price*

Chapter 5: Revise and Save a Search

In this chapter we will cover how to **Revise** a Search and how to **Save** a Search.

5.1-To Revise a Search

The **Revise** feature allows you to modify the search criteria for the search you have just executed. In many cases you may want to change some of the initial search criteria to refine the search.

To revise the search, click on the **Revise** Button which is located just below the search results to the far left. This will take you to the Search screen with all the current criteria already entered, then simply make the changes needed.

Then click on the **Search** Button (or press the “**Enter**” key on your keyboard) to run the search.

*(Note: If you are familiar with the Internet, you might be tempted to use the browser’s Back button to return to the search screen and make changes. In some cases this may cause problems depending upon your version of the Browser. It is always better to use the **Revise** button. If you do happen to use the back button by mistake, click on the browser’s Forward Button and then click on **Revise** to continue making your changes.)*

To Save a Search

The **Save** Button allows you to save your current search criteria so that you can quickly run the search again at any time. The **Save** button is located just below the search results to the right of the Discard Button. The steps to save a search are described on the next page.

(Note: Saving a search is the first step in creating your Market Updates. The Saved Searches are stored in Saved/Automatic Searches section of My Matrix. How to use the Saved Searches as Market Updates is described in detail in Chapter 15 Saved Searches/Market Updates.)

5.2-Steps to Save a Search/Auto Email

After your search is complete and you want to save the last search executed:

- 1) Click on **Save** and the Save Search Criteria text box will appear.
- 2) Type the name for this Search in the **Search Name** box.
- 3) Type in a Description of this search in the **Description** box. (The description is an optional field)
- 4) Primary Email Contact (optional) – If you have stored contacts in Matrix, the “Primary Email Contact” option will be displayed. You can now attach the saved criteria to a contact. To attach this search to a contact:

- a. Click on the down arrow next to the Primary Email Contact.
 - b. Click on the name of the contact to whom you want to attach this search.
- 5) You can designate up to 10 saved searches as “Hot Searches” that will appear on the Home Page each time you log on to Matrix. This make it easy to quickly get market updates for your most active searches each time you log on to Matrix. To designate this search as a Hot Search, click to place a check mark next to “Enable as Hot Search on Home tab”
- 6) If you want to set up this contact for Auto Email, click on the Enable Auto Email button. (See Chapter 15 for more details.)
- 7) Leave the Reverse Prospect box checked if you want the search available for Reverse Prospecting (see Chapter 17 for more details). Leaving the box checked will make it easier for other agents to contact you regarding properties that match your Buyer’s search criteria. However, if you do not want to participate, click the check box to remove the check mark.
- 8) In the Subject box, type in what you want to appear on the subject line of the emails.
- 9) Select which display you would like to send the client by clicking on the down arrow and selecting a report.
- 10) Type whatever message you want to appear in the body of the emails in the Message box. Click the “Check Spelling” link if you want to run the spellchecker on your message to check for errors.
- 11) Select a Schedule for when you want the Auto Emails to go out.
- a. Daily: Select the days of the week you want the emails to go out. You can select everyday of the week or just certain days. There is also an option to have them go out in the a.m., p.m. or both.
 - b. ASAP: This is a great option when the market is quickly changing and your client wants to stay up-to-the-minute with new developments. Emails will go out throughout the day every time there are new or updated listings matching your client’s search criteria. Your client may receive multiple emails throughout the day depending on how active the market is for the search parameters you set.
 - c. Monthly: Emails go out just once a month on the first day of the month.
- 12) Click on **Save** .

To learn how to enter a contact, refer to the Contacts Chapter of this manual (Chapter 18).

After you click **Save** Matrix will return you to your search results.

If you do not want to save this search criteria click on **Cancel** to return to the search results without saving the current search criteria.

To learn more about how to use a Saved Search as a Market Update, please refer to the Saved/Automatic Searches Chapter of this manual (Chapter 16).

5.3-Speed Bar

Open and Close the Speed Bar

To toggle open the Speed Bar, click the arrow next to your login name at the top right of the screen. To toggle close the

Speed Bar, click the X on the right hand side of the speed bar. Each time you log in, Speed Bar will be opened or closed depending on how you left it when you last logged out.

Help Using Speed Bar

For a list of sample shortcuts, click the grey question mark to the right of the Speed Bar entry box.

Run and Revise a Speed Bar Search

Type your criteria into the Speed Bar search box. To run the search, press the Enter key on your keyboard or click the magnifying glass icon to the left of the Speed Bar search box.

In the example above, we are searching for Active listings in St. Louis Park, single family houses, with three or more bedrooms, two or more bathrooms (always enter bedrooms before bathrooms) and priced at \$400,000 or less. Because we did not specify a property type, the search will be in Single Family Residential (the "sf" in the example above designates single family houses, not single family property type).

It does not matter what order you type in the criteria.

When you run your search, the Speed Bar and the criteria stay with you on the search results screen. This allows you to make quick revisions without having to click the Revise button and go back to a search screen. For example, you could add hopk to the Speed Bar and press the Enter Key to rerun the search adding in the Hopkins municipality.

Create and Save Your Own Custom Speed Bar Shortcuts

Do you have a field you search on all the time that does not have a standard shortcut? Create your own that you can save and use again any time! Let's say you frequently search for Lake Front properties. Run a search where the only criteria you select is "Lake Front" in the Lake/Waterfront field.

In the search results, click the blue "Save As" button, then select "New Speed Bar Shortcut."

On the "New Speed Bar Shortcut" screen, type in what you want to use for your shortcut. All custom speed bar shortcuts must start with a forward slash "/". Also, you must use alpha numeric characters (with the exception of special characters & - and _ which are allowed).

Shortcuts are **not** case-sensitive. In this example, we will use /LF for

Lake Front. You may also type in a description. Your criteria are automatically saved. When you are finished, click the Save button.

You may now enter /LF in any Speed Bar Search and that will add Lake Front as a search criterion. You may save as many of these as you want. A Speed Bar Shortcut can include multiple criteria in a single shortcut. For example, we could run a search for all Actives on a Lake Front in a custom Map Area and then saved that as "/LF."

Change or Delete Your Own Custom Speed Bar Shortcuts

To find and change/delete any of your Custom Shortcuts, click the "My Matrix" Tab, then the "Settings" link. From there, click the "Speed Bar Shortcuts" link.

To change a shortcut, for example to add additional criteria, click the shortcut name. For our Lake Front example, we would click on lf:

After you click the shortcut name, you will be taken to a search screen where you can modify your criteria. Make the changes to your criteria, and then click the Save button.

In the example above, we added the criteria m*t*k*a for Lake/Waterfront Name (wildcard search for all spelling and abbreviation variations of Minnetonka). After clicking the Save button, you are taken to a confirmation screen. To confirm your changes click the "Save" button. (Or click the Cancel button if you change your mind and don't want to save the changes.) Notice that the Lake/Waterfront Name has been added to the criteria. Now when you enter /LF in the speed bar, you will get all Lake Front properties on Lake Minnetonka.

Standard Shorthand Criteria Examples

Below are some *generic* examples for all of the system standard shortcuts that could be possible. Please be aware that a specific short hand list will be generated after Speed Bar has been fully configured on your system.

MLS Number search: 2290811 2365891

Street Address: 8420 ox yoke (enter the street number and street name)

Status: a = Active, t = TNAS, p = Pending, s = Sold, cs = Comp Sold, c = Cancelled, e = Expired

Property Type: (will search single family if you do not specify), mf = Multi-Family, land = Lots & Land, comm =

Commercial/Mixed Use, cp = Cross Property. To combine Single Family with another property type, use "res." For example: res land (searches both Single Family and Lots/Land)

Style: sf = Single Family Houses, th = Townhouses, cc = Condo/Coops, tw = Twin Homes

List Price: \$300-400 (all properties listed \$300,000-400,000)

\$300+ (all properties listed \$300,000 or higher)

\$400- (all properties listed \$400,000 or less)

Sold Price: Same as List Price, but include an S before the dollar sign.

For example, S\$300-400

Bedrooms and Bathrooms (always enter Bedrooms before Bathrooms):

3+ (at least 3 bedrooms)

3+ 2+ (at least 3 beds and 2 baths)

Garage Stalls: 1+ gs (at least 1 garage stall)

Total Finished Sqft: 2000+ sqft (2,000 or more Total Finished Sqft)

Acres: 0.5+ acres (half an acre or more of land)

Municipality: mtka (Minnetonka Municipality)

County: ramsey county (Ramsey County)

MLS Area: 300 302 (MLS Areas 300 and 302)

ZIP Code: 55418

Open House Dates: oh 0+ (open houses current date or later)

oh 1/1/2010+ (open houses this date or later)

oh 1/1/2010-1/15/2010 (open houses in this date range)

Agent Search: ag smith (agent last name)

john smith (agent first and last name)

Chapter 6: Sorting Search Results

In Matrix, if you have 500 or fewer search results, Matrix will automatically sort them first by Status, then Area, then List Price (all in ascending order). You can also custom **Sort** your search results.

(NOTE: If you have more than 500 search results, the Sort feature is not available.)

Along with multi-level sorts, you also have the ability to sort the columns in ascending or descending order.

Column Headers

For a quick custom sort on the Single-Line Display, click a blue column header to sort by that field in ascending order. Click it again to switch to descending order. To create a multi-level

sort, click the column headers in the opposite order you want them sorted. For example, if you want to sort first by subdivision, then number of bedrooms, then year built, click the column headers in this order: Built, Beds, Subdivision.

6.1-Sort Button

To create a custom sort based on any field in the database, use the Sort button at the bottom of the screen.

Click on **Sort** under the Search Results.

This will open the **Sort Order** window containing two large boxes. The **Fields** box contains all of the fields that are available to sort by and the **Sort By** box contains all the fields you are currently sorting by (initially, it will contain the default sort).

Adding Fields to the Sort By: box

To add fields to the **Sort By:** box, follow these steps:

- 1) Click on the field you want in the **Fields:** box
- 2) Click on **Add**.

(Double clicking on the field name will also add it) That field will be added to the **Sort By:** box

Removing Fields from the Sort By: box

To remove fields from the **Sort By:** box, follow these steps:

- 1) Click on the field you want to remove in the **Sort By:** box
- 2) Click on **Remove**.

NOTE: You may sort by fields that are not on the Single Line Display, but they will still not show in the display unless you create your own Custom Display (see Chapter 19, Custom Displays).

Ascending/Descending

When you first add a field to the **Sort By** box you will see **Ascending** to the right of it.

This means that the field will be sorted in ascending order. To sort the field in descending order, double click on the name of the field. You will now see **Descending** to the right of the field name, indicating that it will be sorted in descending order.

6.2-Changing the Sort Order

The fields will be sorted in the order in which they appear in the **Sort by:** box. To change the order:

- 1) Click on the field name you want to move
- 2) Click to **Up** to move the field up -OR Click **Down** to move the field down

Remember that the sort order will duplicate the order that appears in the **Sort By** box.

Completing the Sort

When the **Sort By:** box has the fields you want, in the order you want, click on the **Save** button to close the sort window and see your search results in the new sort order.

If you do not want to change the sort order, click on the **Cancel** button and the window will close without changing the sort order. (**Note:** You can save your sort selections by saving the Search using the Save button. Saving a Search is explained in Chapter 6: Revise and Save Search.)

Chapter 7: Print Listing Reports

The Print screen now uses an intelligent reduction filter to display the users most recently printed reports. This new feature will help reduce searching and scrolling for commonly printed reports and hide those reports rarely printed. The complete list of reports always be displayed by clicking “--- more (click) ---”.

The report displayed on the Results screen will still be selected in the Print screen even if it’s not one of the most recent reports.

New users that have never printed reports will see the complete list of printable reports until a pattern of favorite reports has been established usually after several print.

Other changes: When a “PDF Only” report is selected the “Print to PDF” button will automatically be highlighted. When a standard display (non-PDF) is selected the “Print” button will automatically be highlighted.

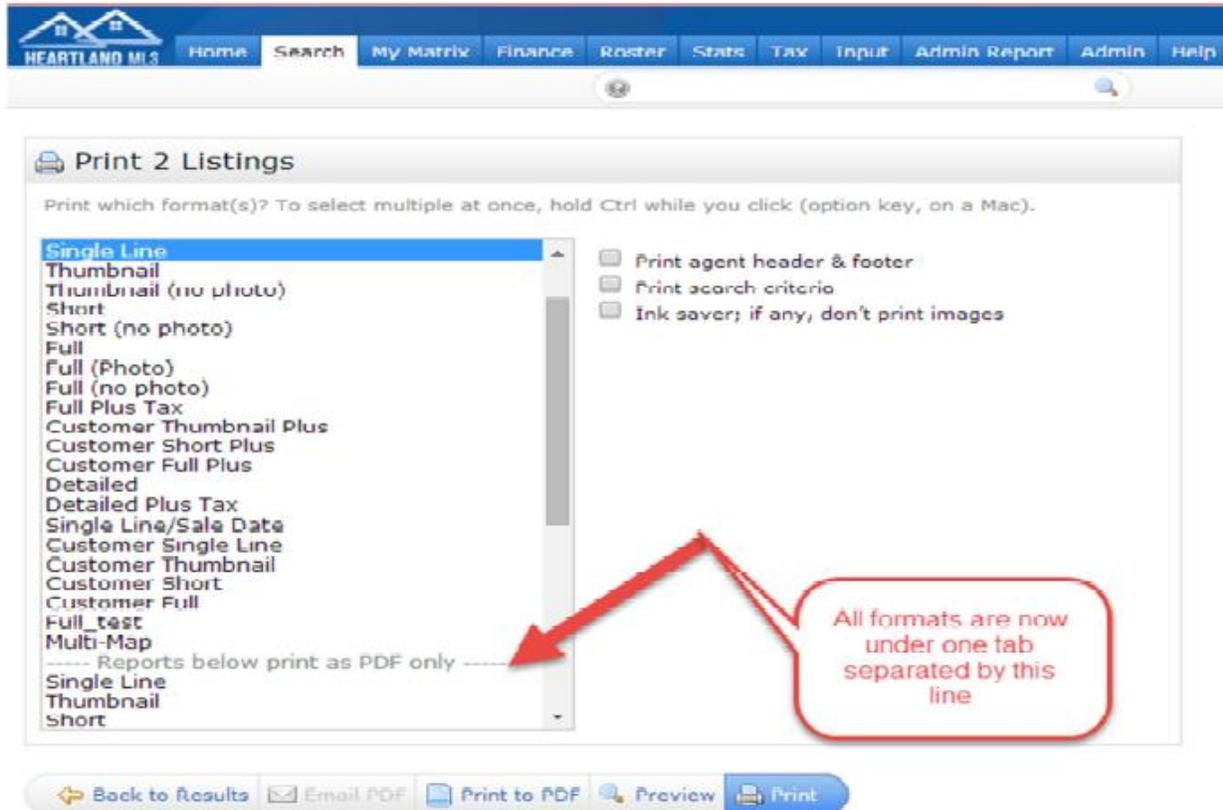
Print 6 Listings

Print which format(s)? To select multiple at once, hold Ctrl while you click (option key, on a Mac).

Agent 1 Line	<input type="checkbox"/> Print agent header & footer
Agent Thumbnail	<input type="radio"/> First page, last page
----- Reports below print as PDF only -----	<input type="radio"/> Every page
Agent Thumbnail	<input checked="" type="checkbox"/> Print with roll-outs (if any) open
Customer Full	<input type="checkbox"/> Print search criteria
----- more (click) ----- 	<input type="checkbox"/> Ink saver; if any, don't print images

Language: English

[Back to Results](#) [Email PDF](#) [Print to PDF](#) [Preview](#) [Print](#)



Chapter 8: Exports

Matrix allows you to download listing data into files that can be opened by a text reader or Microsoft® Excel. Both standard and custom exports are available.

8.1-Export Listing Data

- 1) Conduct a Listing or Tax Search.
- 2) On the search results page, select the listings you want to Export. If you do not select any listings, your entire search results will be exported.
- 3) Click the **Export** button at the bottom of the search results screen.
- 4) This will take you to the **Export** screen:
- 5) Note the number of records selected in bold. If this does not look correct, click the "Return To Search..." button to go back and re-do your selections.
- 6) Click the "Export to:" drop down box to select an Export from the list. The "All Fields" Export will give you all the fields that are on the Property Full Display. Any Custom Exports you created will be at the top of the list.
- 7) Click the **Export** button.
- 8) A pop-up box will give you the option to **Open** or **Save** the file. If you click "Open," the file will open in your default text editor (probably Windows Notepad). If you click "Save," you can save it to your computer and open it with the program of your choice.
- 9) Click the **Save** button.
- 10) Name the file and choose a location on your computer (or network) to save the file.

Click the **Save** button. If you see a “Download Complete” window, click the **Close** button.

11) If you want to view the file as a spreadsheet, open Microsoft® Excel. Select **File>>Open** from the Excel menu.

12) In the File Open dialog box, select “Text Files” in the “Files of type” section.

13) You should now be able to see your Export file. Click to select it and click the **Open** button.

14) You will now go through several simple steps of Excel’s Text Import wizard. In step 1 of 3, leave the default “Delimited” selected for Original data type.

15) Click the **Next** button. In step 2 of 3, leave “Tab” selected as the delimiter if it is a standard export or a custom export where you chose Tab as the delimiter. If it is a custom export where you chose comma as the delimiter, uncheck Tab and check Comma.

16) Click the **Next** button. In step 3 of 3, you have the option to format each field column from here and choose columns not to import. It may be easier to skip this step and do all formatting from within the Excel spreadsheet.

17) Click the **Finish** button. Your Export file will open as an Excel spreadsheet with each field in its own column.

8.2-Create or Edit a Custom Listing Export

1) Click the **My Matrix** tab, then the “Custom Exports” link.

2) This will take you to the **Manage Custom Exports** screen.

3) Under **Table Type**, select listing (if creating/editing an Export for your listing search results)

4) If you selected “listing,” select the property type for your Export under **Table**.

5) Click the **Add Export** button (or **Edit Export** if you want to make changes to an existing Custom Export).

6) This will take you to the **Set Export Definition** screen.

7) Type in a Name and Description for your Custom Export.

8) Select the fields you want in your Export from the **Available Fields** box. To make a selection, click on a field name to highlight it. Double click it or click the **Add->** button to move it to the **Export Fields** box.

9) To remove a field, click to highlight it in the **Export Fields** box. Double click it or click the **Remove<-** button to remove it.

10) To change the order of an Export Field, click to highlight it in the **Export Fields** box. Use the **Up** and **Down** buttons to move it up or down in the list.

11) If you want the field names to be column headers in the first row of your export, click to place a check in the checkbox next to **Include Column Names in first row**.

12) The default **Separator** (to separate fields from each other) is a Tab. This should work for most of your exports. If you prefer, you may select Comma.

13) When finished, click the **Save** button.

14) Run your Listing or Tax Search. Follow the instructions at the start of this chapter to download your Export file.

8.3-Delete a Custom Export

1. Click the **My Matrix** tab, then the “Custom Exports” link.

2. This will take you to the **Manage Custom Exports** screen. Select the **Table** and **Table Type** where the export(s) you want to delete are located.

3. Click to highlight the Custom Exports you want to delete.
4. Click the **Delete** button. In the confirmation box, click the **OK** button. Your selected Custom Exports are now deleted.

Chapter 9: Emailing Listings

9.1-Email

Matrix allows you to easily email listings to your clients. Before you go to the email screen, you will want to select the listings that you would like to email from your Search Results screen.

Click anywhere on the line of each listing to make your selections.

The Email button will be “greyed out” until you select at least one listing.

Once you have made your selections, click on to go to the Email Screen.

From: Your email address automatically fills in for the “From” section. It is taken from your MLS roster entry. If it is blank, you will not be able to send emails from Matrix. To have an email address added, or to change the existing address, contact your local REALTOR® Association where you have your membership. They will make the change in their membership records which will copy to Matrix overnight.

There are several ways to fill in the Addressee section.

1. If you have not set up the recipient as a Contact (see Chapter 18), type in the email address in the input box to the right of the icon.
2. If the recipient is in your Contacts list, start typing the name (first, last or email address) in the input box. A pop-up list of your contacts will appear and narrow as you type. Select the contact from this list at any point.
3. Click the icon to open a pop-up window list of your Contacts. Select your contact from this list.

(Note: Multiple addresses can be entered by separating them with a comma.)

Complete the Carbon Copy (Cc:) section using the same procedure as above. Using step 3, you can also enter a Blind Carbon Copy (Bcc:) recipient. Anyone who is in the To: or Cc: section will not be able to see who received the email through Blind Carbon Copy.

Click the checkbox to insert a checkmark if you want a copy of the email sent to your email address (without your clients knowing it). It’s a good idea to copy yourself on everything you send. That way, if there is a question about what you sent, you will have a copy of the email they received. The text in bold type notes how many listings you have selected to email. Check this number to make sure it is correct. Click the drop-down arrow to view all the displays that are available for you to email.

The “**Customer**” formats are designed specifically for view by customers, and do not include Agent Remarks, Listing Agent Contact information, commissions, and other fields not intended for public view. If you want your customers to have that information, select from the “**Property/Agent**” formats.

To Preview what the display will look like for your customer, select one of the formats, then click the grey “Preview” next to the Display drop-down box. A popup window will open showing you how the display will appear.

Notes regarding emailed displays:

1. On all of the “Customer” formats, your customer will be able to click on the

MLS number to view the Customer Full Display. Similarly, if you send any of the “Property” formats, the MLS number will link to the Property Full Display.

2. The Customer and Property “Condensed” displays are designed to print one listing per page for most listings. As noted above, your customer can click on the MLS number link to view the full information.

Be sure to enter something in the **Subject:** box. Otherwise, your email may not be properly recognized by the recipient and may be mistakenly deleted. To enter the Subject, click in the box to the right of **Subject:** and type. Remember you will want your subject to get your client’s attention.

After entering the subject, type in a message to your client in the Email Body section. As you type, the “Characters Remaining” counter below the box will tell you the maximum number of remaining characters you have left. After entering your message, click the “Check Spelling” link if you want the system to check and notify you of any spelling errors.

If you have an Email Signature set up under My Matrix (see Chapter 20), you will find it automatically inserted in the Email Body section. You can change or delete it for this email. To permanently change or delete it, you must do so under Settings in My Matrix.

Click the **Send** button to send the email. After the email is sent you will see an **Email Submitted** confirmation message that includes the information that you sent (you may want to print this for your records). Keep in mind that this message indicates that the message was sent, not that it was received.

(Note: If you have emailed to an invalid email address, a notification will be sent to your email account).

From this screen, click the **OK** button to return to your search results.

Anti SPAM Efforts

Recipients of Matrix emails tend to be marked as SPAM (abuse of electronic messaging systems to send unsolicited bulk messages indiscriminately) to their Internet Service Provider (ISP). It is particularly a problem with some large ISPs such as Yahoo and AOL. If enough Matrix emails get reported as SPAM, users are blacklisted from sending any emails to anyone at that ISP through Matrix resulting in time and effort from Tarasoft and MLS staff to get back on the “whitelist.” In an effort to reduce the extent of this problem the following features have been implemented:

A Note Regarding the Email Contact’s Email Address

Email addresses are verified to ensure that emails are wanted before they are sent through the Matrix system. This is done through a feedback loop process that checks to see if the email recipient has marked Matrix email as spam or if the email recipient has selected any of the unsubscribe options. This process helps prevent the MLS from being blacklisted by Internet Service Providers (ISP) and improves our email deliverability.

Receiving the initial Opt-in auto email

Opening the link to the listings in the initial auto email will result in the recipient being opted in to receiving future updates for that auto email. If the email recipient never opens the first auto email they will not receive subsequent auto emails. The opt-in message will state:

“Insert desirable Text Here”

The message should clearly convey that by clicking the link provided will result in subsequent E-mails and that if the user doesn’t want to receive them to NOT click the link.

Subsequent auto email will utilize the senders' Subject and Body from the Saved Search.

Example:

Unsubscribe

All emails sent through Matrix have an unsubscribe link that leads to a page allowing recipients the ability to unsubscribe from receiving Matrix emails. Auto Emails have all the options below. Manual Emails have the second and third options.

- **Unsubscribe from a specific real estate professional.**

This is used when the recipient believes they are receiving unrequested email from a specific real estate professional. This automatically happens when your email was marked as Spam by the recipient. If they unsubscribe or mark you as spam, this will block only the specific real estate professional from sending additional email to that recipient.

- **Unsubscribe from the entire MLS.**

o This is used when the recipient believes they are receiving unrequested email and are not interested in receiving future real estate related email through the multiple listing systems (MLS) from any real estate professional. This will block all real estate professionals from sending additional email through the multiple listing systems (MLS) to that email address.

- **Unsubscribe from a specific Auto-Email.**

Auto Email will have a third option; Disable a specific auto email. This is used when the recipient no longer wishes to receive updates or wants to adjust the search criteria for a specific auto email. The agent can reenable this auto email at their discretion. (This option is not visible in the above screen shot and will only appear on Automatic Email).

Agent unsubscribing from themselves or marking themselves as spam

Agents cannot unsubscribe from themselves or even mark their own email as Spam by mistake. The system will prevent you from doing this.

Agent notification

In all cases, if your email was unsubscribed to, marked as spam or even disabled, the agent will be sent an email notification from Matrix letting them know what happened and what to do to assist their client if they unsubscribed by mistake.

This is not Junk/Spam

In cases where a recipient has marked an email as spam through their email provider (such as AOL, MSN or Hotmail) simply re-subscribing might not be enough. Their email provider may need to be notified that they want to receive emails through the MLS. The links below provide specific email help regarding what to do.

ISP Specific Help

AOL (AOL Browser/Mail Toolbar):

<http://help.aol.com/help/microsites/microsite.do?cmd=displayKCPopup&docType=kc&externalId=219050>

AOL Webmail:

<http://help.aol.com/help/microsites/microsite.do?cmd=displayKCPopup&docType=kc&externalId=220979>

MSN/Hotmail/Live:

http://help.live.com/Help.aspx?market=en-US&project=MailClassic&querytype=topic&query=WL_Mail_PROC_BlockEmail.htm

Yahoo Classic: <http://help.yahoo.com/l/us/yahoo/mail/classic/abuse/>

Yahoo New: <http://help.yahoo.com/l/us/yahoo/mail/yahoomail/abuse/>

Re-Subscribe (opt in)

To re-subscribe and allow Matrix emails to be delivered again a recipient simply needs to send an email to an Optin email (yet to be determined) from the email address they unsubscribed from. Re-subscribing will remove all blocks assigned to that recipient and allow the recipient to receive email through Matrix again. This email can be blank, no subject or body text required.

Glossary of Terms Regarding SPAM

US CAN-SPAM Act - A law adopted on January 1st, 2004, that establishes requirements for those who send email with primary purpose of advertising or promoting a commercial product or service.

Blacklist - Blacklists are lists of known spammers, which contain their IP addresses, and/or their ISP (Internet Service Provider). Such information helps spam filters block all messages coming from known spammers and/or their ISPs.

False Positives - Email that is labeled as spam by a spam filter of the recipient, while not being spam.

Feedback loop (Spam complaint) - The process by which the email client (ISP) of the receiver forwards complaints of emails marked as spam by recipients for removal by the sender.

Opt-in - The action of agreeing to receive emails from a particular company, group of companies or associated companies, confirmed by subscribing to an email list.

Opt-out - A mailing list which transmits emails to people who have not subscribed and lets them ?opt-out? from the list.

Sometimes it is used to confirm that such emailing address is valid for further spamming it.

Mailer-daemon - Software in a mail server responsible for message delivery. When you get a MAILERDAEMON@whatevercompany.com message in your inbox, the server at that company is informing you that it is returning your message because of some failure.

9.2-Email History

Matrix keeps track of all emails you send through the system for 90 days. To view your email history, click on the "My Matrix" tab. Click on the "Email History" link (the total number of emails you have sent within the past 90 days appears below the link). The Email History screen will appear. Your emails are in two sections: those you sent manually through Matrix (using the "Email" button) and those sent through the Auto Email function (see chapter 16).

You may filter your results to see only those sent to a specific contact, those assigned to no contact or all emails. To set the filter, click the "Filter by" drop down box.

You may display 10, 25, 50 or 100 per page. To make this setting, click this drop down box and make your selection. Click on any blue, underlined column header to sort the emails by that column in ascending order. Click the column header again to sort in descending order.

To view the listings that were sent with that email, click the "View" link in the row for that email. For Auto Email, you can view those that were sent as "New" and the whole "All" list.

Note: You can open information on each sent email by clicking the email sent date or the triangle next to it. Above are examples of information opened on a Direct Email and an Auto Email. For the Direct email, you click the number of the listings under the Contents column to view the listings you sent (or you can click the "Open in Portal" button). You're also able to see

the body of the e-mail that was sent for historical reference. For Auto Emails, you have all the options that are also available to you in the Auto Emails section of your Contacts.

Chapter 10: Plotting Listings on a Map

Matrix can plot a single listing or multiple listings on a single map.

To plot multiple listings on a single map, select the listings that you would like to plot on the map and click the **Map** button at the bottom of the screen.

Matrix will display a map showing all of the listings that you selected. A push pin will indicate each listing's location and the property address will appear alongside it.

At the top of the map are controls to adjust the **map size** and to **zoom in or out**. Click on a direction name to move the map in that direction.

To **print** the map, select **File/Print** from your Web browser menu bar.

When finished with the map click on to go back to the listing results screen.

Chapter 11: Discard or Narrow Listings

Matrix gives you two different ways to work with your search results when you are selecting or de-selecting properties. When you are viewing the Search Results Screen you will see a Discard and Narrow Button at the bottom of the screen.

11.1-Discard Button: for deleting your selected listings.

Narrow Button: for selecting the properties you want to keep and deleting the other listings.

NOTE: If this is a search you want to Save, it is important that you do so *before* using the Narrow or Discard buttons. Once you use these buttons, the search parameters are changed to reflect only those listings you keep in your results. For more information on how to save a search, see Chapter 6, "Revise and Save a Search."

Using the Discard Button

As you review the search results, there might be listings that have matched your search criteria but are not of interest to your client. The **Discard button** allows you to delete these listings from the displayed results. After clicking on the **Discard Button**, Matrix will add an **Un-Discard Button** if you would like to retrieve the listings you previously discarded.

(Note: There is a limit of 50 discarded listings that you can "Un-Discard" per search. If you find that you are always using this function, there is a possibility it would be better to refine your search so you would not have to discard as many listings).

To Discard Listings

- 1) Select the listings you want to discard;
- 2) Click on **Discard**.

The selected listings will be "discarded" from your search results. At the bottom of the search results screen you will be able to see how many listings you are excluding.

(Note: If you discard listings and then save a search, those listings will also be excluded from any updates you run.)

Adding Discarded Listings back to your Search Results

To add discarded listings back to your search results click on to the right of the button. After you click on the **Discard Button**, Matrix will add the discarded listings back to your search results.

(Note: Any listings that have changed and no longer meet your search criteria will not be added back to your results.)

11.2-Using the Narrow Button

Another way to work with your Search Results is to select the listings you want to look at, email or print and use the **Narrow Button** to delete the listings you do not need anymore. The **Narrow Button** is the opposite method from the **Discard Button**. Both methods work well, and you can decide which button works better for you.

1. Select the listings you want to **keep**.
2. Click on **Narrow**. All but your selected listings will be removed from your results.

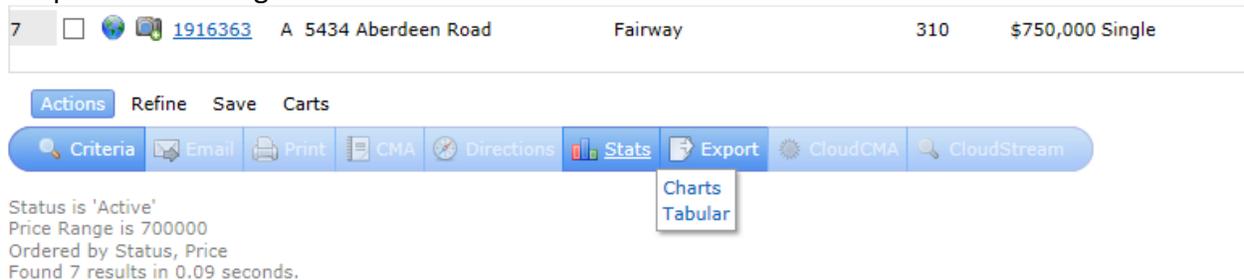
Note: After you remove listings using the Narrow button, the only way to get them back is to re-run the search.

Chapter 12: Statistics

12.1-Quick Residential Property Statistics

From your search results page, ensure that either no listings are checked or that they are all checked. Click on the **Stats** button at the bottom of the page.

Drop down menu agent will need to select "Tabular"



7 [1916363](#) A 5434 Aberdeen Road Fairway 310 \$750,000 Single

Actions Refine Save Carts

Criteria Email Print CMA Directions Stats Export CloudCMA CloudStream

Status is 'Active'
Price Range is 700000
Ordered by Status, Price
Found 7 results in 0.09 seconds.

Charts
Tabular

These results will show statistics minimum, maximum, sum and other states on selected properties.

Quick Residential Property Statistics

Status: Active (7)

	List Price	Sale Price	Beds	Full Baths	Half Baths	SqFt	DOM	CDOM
Min	\$700,000	-	3	3	1	4292	20	20
Max	\$750,000	-	6	6	2	7211	296	296
Avg	\$721,997	-	4	4	1	6086	119	141
Median	\$724,976	-	4	4	1	6425	88	127
Sum	\$5,053,976	-						



Back



Printer friendly

12.2-Marketing Stats

An important development for Matrix is the addition of an entirely new statistical module. We're just calling it "**STATS**" for short. Using **STATS**, you can generate charts showing various aspects of market activity. These charts display on the screen and can also be printed and emailed. **STATS** comes with default templates you can use to generate standard charts. The real power of **STATS** is the ease with which you can tweak the time periods and other parameters to create a higher level view of the market.

Work through the three tutorials that follow to learn how **STATS** functions.

STATS Tutorial: Average DOM

In this example, we'll generate a chart showing the average days on market of listings in Lee's Summit.

Specify Search Criteria

In the Residential Quick search screen, select just one item of criteria: City of Lee's Summit: *Notice that we've not specified any **status** or any **dates** in our search criteria. This is deliberate: **STATS** will make these choices for you. In a typical charting exercise like this, limit your criteria to just describing **the type of listing you want to analyze.***

Enter STATS

No need to run a search in this example. On the button bar at the bottom of the Residential Quick search screen, click the **Stats** button.

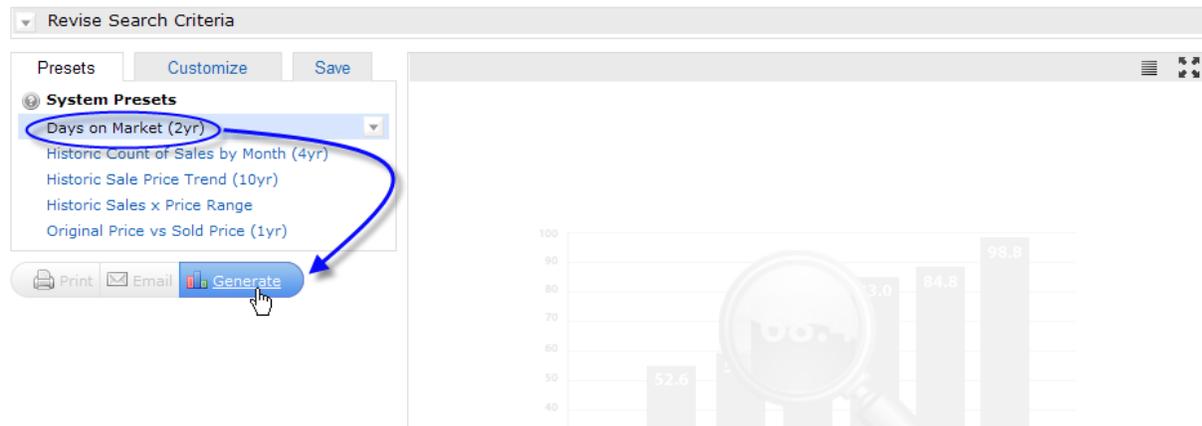
*In **STATS**, a "Preset" is a template you can use to quickly generate a chart based on a predetermined series of settings. **STATS** recognizes two types of Presets:*

***System Presets** are available to all Matrix Users. You can make copies, then modify the copies to serve your own purposes.*

***My Presets** are those you create yourself and which are only available to you. You can create, copy, modify and delete your own Presets.*

Choose a Preset and Generate the Chart

For our Days on Market example, choose the System Preset called **Days on Market (2 Yr)**, then click the **Generate** button:



When the calculation is complete, the Chart panel on the right side will redisplay with our DOM chart.

The search criteria that **STATS** has used to generate the chart is shown beneath. **Get into the habit of checking your search criteria**, since **STATS** may have to tweak it to make a sensible chart. Remember how we didn't specify the status or a time period? Notice how **STATS** has chosen a two year window for you.

Print Your Chart

Click the **Print** button at the bottom left to open the Print window. At the bottom of the Print window, use the **Hide Chart** or **Hide**

Tabular Data buttons if you only wish to print one or the other.

Then click **Print** to send your Chart and/or its table to the printer. Then click the **Close Window** button to return to **STATS**.

Email Your Chart

Click the **Email** button at the bottom left and email this chart to yourself. Decide if you'd like to send the chart only or if you wish to include the underlying data. Adjust the email subject and add a message, then click the **Send** button in the upper right. After the message is sent, click the **OK** button to return to **STATS**.

Tweak the Days on Market (2 Yr) Preset

Click on the **Customize** tab to access the various settings that **STATS** has used to generate our DOM chart. You can make any tweaks you like then examine their effect by clicking the

Generate button again. Start by clicking **Show Advanced Options** and **Show Style Options**. Then try these tweaks:

- Change the **Time Frame** to Year To Date (2010). Click the **Generate** button to see the result.
- Change the **Statistic** from Days to Sell, Median to Days to Sell, Average. Click the **Generate** button to see the result.
- Add Days to Sell, Median as a **Secondary Statistic**. Click the **Generate** button to see the result.
- Change the **Chart Type** of either or both the Statistic and the Secondary Statistic between Column, Line and Smooth Line. Click the **Generate** button with each change to see the effect.
- Play with the Chart Style options for colors, showing data points and/or employing a 3D representation.

Click the **Generate** button with each change to see the effect.

Presets Customize Save

Time Frame
Past 2 Years

Statistic
Days to Sell, Median
Chart Type: Smooth Line

Secondary Statistic
None

Group By
Month

[Hide Advanced Options](#) · [Hide Style Options](#)

Chart Style
Color Palette: Default
Display Data Points:
Use 3D Chart Style:

Print Email Clear Generate

Save Your Own Preset

Adjust the settings here on the Customize tab as follows:

- Time Frame: Past 12 Months
- Statistic: Days to Sell, Average
- Chart Type: Smooth Line
- Secondary Statistic: Days to Sell, Median
- Chart Type: Smooth Line
- Group By: Month
- Color Palette: (your choice)
- Display Data Points: (your choice)
- Use 3D Chart Style: off

Now click on the Save tab and give your new Preset a name like "DOM Past 12 Months – Avg & Med". Then click the **Save a Copy** button. When you next visit the Presets tab, notice how you have a new "My Presets" entry of this name. It's available for you to use any time you visit **STATS**.

Using Your Preset with Other Criteria

Now that you've saved your first personal preset, just like the System Presets, it can be used with other searches too. In a new Residential Quick search screen, enter these two items of criteria: City of Olathe; List Price 350+:

Enter **STATS** by clicking on the **Stats** button as we did above. Select your new Preset called **DOM**

Past 12 Months (Avg & Med), which you'll find in the My Presets section of the Presets panel. Then click the **Generate** button.

In the Chart area, **STATS** will build the two-line chart showing both Average and Median DOM, as it did when we created it above. Note, however, that the criteria section below shows the underlying data is based on your new search criteria.

STATS Tutorial: Create a "With Criteria" Preset

There may be cases where you'd like a Preset to retain your search criteria for a chart you recreate often. Here's an example showing how this can be achieved. In the Residential Quick search screen, select Wyandotte County:

Click the **Stats** button as we've done above to enter **STATS**.

Now select the System Preset called **Historic Sale Price Trend (10 yr)**, then click the **Generate** button. Confirm your search criteria beneath the chart as usual.

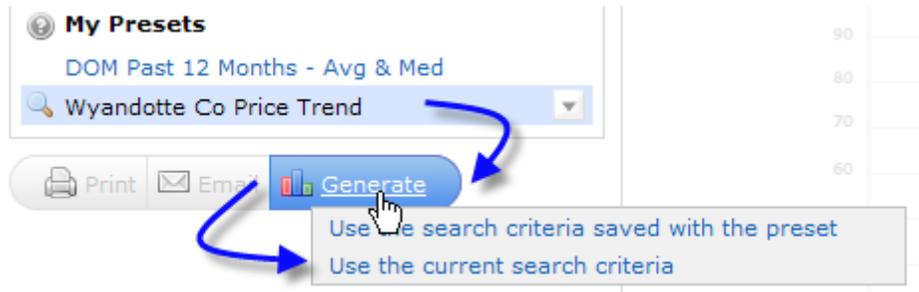
Click on the Save tab and change the name to "**Wyandotte Co Price Trend**". Click on Save Search

Criteria with Preset and then click the **Save a Copy** button.

Click on the Presets tab and you'll see the new preset showing in the My Presets section with a magnifying glass beside it.

This signifies that this Preset is stored with criteria:

When you next choose to generate a chart with this Preset, **STATS** will give you the choice of using the criteria you've just saved or whether you want to use the search criteria in force at that time.



STATS Tutorial: Generate Chart from Search Results

In the first two tutorials, we've generated our charts without running a search by specifying search criteria and clicking the **Stats** button on our search page. You can also complete a search, then go into **STATS** to create your chart.

Run a Search

In the Residential Quick search screen, supply the following criteria:

- Status Sold;
- School District Shawnee Mission;
- Sold Days Back 360+;

Then click the **Results** button to see the listings this search finds.

Enter STATS

On the button bar at the bottom of the search results screen, click the **Stats** button. This one works differently from the **Stats** button on the search screen in that you have a choice:

- Charts - that is, **STATS**
- Tabular Stats - the table of aggregate statistics that we were able to generate prior to Matrix v5.5

Choose a Preset and Generate the Chart

Select **Charts** to arrive at **STATS**.

Select the "**Historic Sales X Price Range**" System Preset then click the **Generate** button to create the chart.

Notice how **STATS** has ignored Status and Sold Date criteria we entered. This is because for this type of Preset which produces a "this year, last year" comparison of Pending and Sold deals, these elements of criteria are not necessary. When **STATS** makes a criteria modification like this, it will tell you clearly with a yellow alert. You will also receive an alert if **STATS** feels that too few listings are included to make a meaningful chart.

*Unlike the tabular statistics you can generate from your search results, **STATS** generates your charts, it may have to **discard elements of search criteria incompatible with the Preset.***

*STATS is geared to providing a high-level view of market activity. If you need aggregate statistics based on an exact set of search results, when you click the **Stats** button on a search results screen, select the **Tabular Stats** choice.*

Other Notes on STATS

Click on a System Preset, then click its **down arrow** to save a copy as a personal Preset. Do the same with one of your personal Presets and you can also **save** it (if you've been tweaking it) or **delete** it.

Chapter 13: CMA Reports

To prepare a CMA report you must first conduct a search for similar properties. (See Chapter 2 - Performing Searches).

13.1-Creating Your CMA

The CMA Wizard takes you step-by-step through creating a CMA. You may start from a Contact under My Matrix, or from your comparables search results.

13.2-Start Your CMA

From Contacts:

Click the My Matrix tab, then the Contacts link. Open the Contact for whom you want to create a CMA. Click the "Start CMA" button.

From Comparables Search Results:

Run a search for your comparables and select all the properties you want to include in your CMA. Click the blue CMA button at the bottom of your search results.

From the CMA Start screen, select the Contact Name, CMA Type and type in a CMA Description.

Save as you work!

The CMA will periodically auto-save your work. To manually save your work, especially if you plan to step away for a while, click the diskette icon on the right end of the CMA Wizard navigation bar.

13.3-Select Your CMA Pages

After completing the Start screen, click "Pages" to the right of Start on the CMA Wizard navigation bar.

Here you will select the pages you want to include in your CMA. They are organized into four categories: cover sheets, adjustments/subject, comparables/graphs, and static (standard pages that are always the same regardless of your data).

Click the plus sign + next to a category to open it and view the available pages. **To select an available page**, simply click once on the page name and it will appear in the Selected Pages box to the right.

To change the order of a page in the Selected Pages box, single click the page name, then click the blue up or down arrow on the right to move it.

To delete a page from the Selected Pages box, single click the page name, then click the red X on the right to delete it.

To remove all selected pages at once, click the "Clear" link at the bottom right corner of the Selected Pages box.

If there is a core set of CMA pages that you usually select, you can **set those pages as the default** for that property type so that you don't have to reselect them every time. After you have selected your core pages, click the "Set as Default" link at the bottom of the Selected Pages box. Now those pages will automatically be selected each time you create a CMA for that property type. You can still add or remove pages to tailor any CMA to a particular client. As you are adding and removing pages, you can revert to your default set at any time by clicking the "Restore Defaults" link.

Matrix 6.1 now allows users to upload custom PDF files for inclusion in their CMAs. Once these files are uploaded, they are stored within the MyMatrix database for the agents to use at their discretion.

matrix Home Search My Matrix Add/Edit Finance Roster Stats Realist Tax MLSL OnDemand Links Admin Help Hello, Dan · Logout

Start Pages Subject Cover Comparables Map Adjustments Pricing Finish

Autosaved at 9/11/2012 2:22:39 PM

Available Pages

- My Custom Pages
 - About me.pdf
 - Neighborhood Expertise.pdf
- Cover
 - Cover Sheet
 - Cover Sheet 1 with Agent Photo
- Subject/Adjustments
- Comparables
 - Minimums and Maximums
 - Chart Days on Market
 - Chart List and Sale Price
 - Pro Report
 - Full Report
 - Brief Report
 - Listing Details 3 Up

Upload Custom Pages

Selected Pages

- Cover Sheet
- Minimums and Maximums
- Full Report
- Neighborhood Expertise.pdf
- About me.pdf

Set as Default Restore Defaults Clear

The "Upload Custom Pages" link, located on the Page tab of the CMA wizard directs users to a new "My Custom CMA Pages" dialogue. Here users can optionally include their header/footer package, change the order of their pages, and preview their page (an important step if the header/footer is included).

By default: Users are limited to 5 "My Custom Pages"

Each file is limited to a maximum size of 250kb

Only letter size content can be properly accommodated (portrait or landscape)

My Custom CMA Pages

Description	Add Header?	
<input type="checkbox"/> About me.pdf	<input checked="" type="checkbox"/>	Move Up Move Down Preview
<input type="checkbox"/> Neighborhood Expertise.pdf	<input checked="" type="checkbox"/>	Move Up Move Down Preview

Select a PDF file to upload:

13.4-Set the Subject Property

After selecting your pages, click “Subject” on the CMA Wizard navigation bar. You have three options available for setting the Subject property information:

1. Type in the subject property fields manually;
2. Search the MLS for your subject property and then select it for auto-fill;
3. Type in the MLS number for your subject property to be auto-filled.

If you auto-fill your Subject property from an existing listing, the photo will automatically fill too. If you want to change the photo (or you are filling all the information in manually), click the “Browse” button in the Property Photo Box. Find the photo file on your computer and select it. Click the “Upload” button.

Matrix has added the option to add custom fields to allow the user to adjust additional property attributes besides those already shown on the Subject Property screen. Each custom field now has the option of being to a field in the Matrix database. If the custom field is linked to a field, those values will be used for comparison between the Subject Property and the Comparable Property.

Dimensions		<input type="text"/>	
Acres	<input type="text"/>	Check Spelling English	
Sqft	<input type="text"/>	Map Location	
Auto	<input type="text"/>	Latitude	<input type="text"/> <input type="button" value="Locate"/>
State	<input type="text"/>	Longitude	<input type="text"/>
Custom Fields			
SELL CONCESS	<input type="checkbox"/> ▲	<input type="text"/>	
PRICE ORG	<input type="checkbox"/> ▲	<input type="text"/>	
	▲	<input type="text"/>	
	▲	<input type="text"/>	

To add a custom field, click the Up arrow in the Custom Field and it will display a box to select an additional field. Please note that you must check the box next to “Link to a Matrix Field” to allow access to the list of fields available.

The screenshot displays a form with the following fields: Age, Age Description (21-30 Years), and Basement Desc (Slab). An 'Edit Custom Field' dialog box is overlaid on the form. The dialog has a checkbox labeled 'Link to a Matrix Field' which is checked. Below this checkbox is a list of matrix fields: Age Restricted?, Agency, Allow AVMs, Allow Comments, Appraiser, Architecture, Area, Attached?, AU - Absolute?, and AU - As Is Condition?. A search field is located below the list. At the bottom of the dialog are 'Cancel' and 'OK' buttons. A red arrow points to the 'Link to a Matrix Field' checkbox. To the right of the dialog, there is a 'Remarks' section with a 'Clear Remarks' button and a 'Check Spelling English' link. Below that is a 'Map Location' section with 'Latitude' and 'Longitude' input fields and a 'Locate' button. At the bottom of the form, there is a 'Save Custom Fields as Default' button.

Custom fields not linked to the Matrix database can be created as well. Do not check the box by “Link to Matrix Field” and simply enter the custom field to be added in the Label field and click OK. In order for any Custom field added to be saved, the user must click on the link “Save Custom Fields as Default”. They will not be displayed on vertical comparison report of the CMA unless this step is completed. The search criteria used to find CMA comparable listings is now saved with each CMA created. To add additional comparable listings to a CMA, the previously used criteria can be reused or modified.

13.5- Format Your Cover Page

After completing all your Subject property information, click “Cover” on the CMA Wizard navigation bar. Note: If “Cover” is greyed out, you have not selected a Cover as one of your CMA Pages. Click “Pages” on the navigation bar to go back and select one.

Contact Information

As long as you selected a Contact for the CMA, the Contact information will automatically fill.

Agent Information

The Agent Information section does **not** auto-fill. This is so that you can set it however you want with variations from your Roster information. The first time you complete a CMA, enter your Agent Information how you want it to appear on all CMAs. Then click the link “Set as Defaults.” From that point, your Agent Information will always auto-fill with your default information.

Alternate Subject Photo

If you have uploaded a subject photo, it will automatically appear here. If you have a different subject photo that you want to use just for the Cover sheet, upload it here. Your original subject photo that you uploaded on the “Subject” screen will still be used on the interior CMA pages.

Agent Photo (Optional)

If you would like your photo or Broker Logo included on the Cover Page, upload it here. If you change your mind after uploading the photo, click the “Clear Photo” link.

13.6-Select/Edit Your Comparables

After completing your Cover Page set-up, click “Comparables” on the CMA Wizard navigation menu. If you already selected your comparables before starting the CMA, they will be shown here and you will have the option to add more comparables or delete any you no longer want. Otherwise, you will select your comparables here from scratch.

To select comparables, you have two options: run a search or add from your Cart (if you already placed them there from an earlier search).

To run a search, click the “Search for Comparables” button.

Run your search like you would any Matrix search. In your search results, select all the properties you want to use as comparables, and then click the “Add Selected” button at the bottom of the screen.

Back at the Selected Comparables screen, you can:

Remove comparables by selecting them and clicking the “Remove Comparables” button.

Add more comparables by clicking either the “Search for Additional Comparables” or “Add Comparables from Cart” button.

13.7-CMA Comparables Map

Map tab in the CMA Wizard allows users to preview a map that illustrates the location of comparables in relation to the subject property. Please note that in Matrix 6.1 the CMA comparables map is static – Matrix produces a “best fit” map panel based on the geo-location of the property group.

13.8-Adjust Your Comparables (Optional)

If you choose to make adjustments to your comparables on any field, this is where you do it. After selecting all your comparables, click “Adjustments” on the CMA Wizard navigation bar.

Single Line Mode

When you go to Adjustments, it defaults to Single Line Mode. This allows you to set a value for any feature and have all of the comparables automatically adjusted according to that setting. For example, let’s say you have decided that you want to value Bathrooms at \$1,500. In the Feature Value box for Bathrooms, type in 1500 (do **not** add a + or – sign). In this example below, the Subject property (shown in bold at the top), has 2 bathrooms. The adjustments for each comparable all happen automatically when you type the number in the Feature Value. So properties with 2 bathrooms (like our Subject) have no adjustment because they are already comparable. Properties with only one bathroom are adjusted upwards \$1,500 to make them comparable with our

Subject which has two. In one case, there is a comparable with 4 bathrooms. This is adjusted downward \$3,000 because it has 2 bathrooms more than our Subject.

Continue this down the line for whichever fields you want to make adjustments on. Use your Tab key to move from one field to the next, or use the navigation buttons at the bottom:

Detail Mode

If you prefer to make your adjustments in Detail Mode, click the “View in Detail Mode” link at the top right of the screen.

Detail Mode works like the previous version of Matrix CMA. You make your adjustments manually for each field for each comparable property, one property at a time. Click the “Next” and “Previous” buttons to move ahead or back among your comparable properties. If you want to switch back to Single Line Mode at any time, click the “View in Single Line Mode” link.

13.9-Make Your Pricing Recommendations (Optional)

If you want to add Pricing recommendations to your CMA, this is where you do it. Note: If the Pricing option is grayed out, it is because you did not select the “Pricing Recommendations” page. Go back to the “Pages” section and select this page, then you can click “Pricing” on the CMA Wizard navigation bar.

Summary

This informational table will be included in your Pricing Recommendation. It compares your Comparable prices with the adjusted prices (if you made any adjustments).

Suggested List Price

Matrix will not make a price recommendation for you. This requires your analysis based on your experience and combining all factors that may or may not be included in the CMA. This is a free-form box that allows you to enter whatever you wish, such as a price or price range, including explanation. Or you may leave this space blank and write the price in by hand when you meet with the client.

Notes

Enter any additional comments you want to appear with the suggested price.

13.10-Finish (View, Print and Email)

When you are ready to view, print and/or email your CMA, click “Finish” on the CMA Wizard navigation bar.

In addition to summaries of selected pages, comparable properties count, client name, subject photo/address, you also have the option to View or Email your CMA. **To run your CMA report and view it** in PDF format, click the “View CMA” button in the upper left corner. Once the CMA is opened in a new window in PDF format, you may **print it by selecting File>>Print from the Adobe PDF menu bar.**

To email a link to the CMA Report to your client, click the “Email CMA” button, fill out the email form and then click the “Send link.

If you have set up a team in your Matrix settings, you will have the option to print/email the CMA as yourself or on behalf of your team (such as in the example below).

To retrieve a saved CMA at a later date, click the “My Matrix” tab. You can either click “CMAs” to get your full list of

Saved CMAs, or click “Contacts” and open the CMAs just for a particular client. When you find the CMA you want, click the button to open the CMA Wizard, view the CMA (run it as a PDF), email the CMA or delete it.

13.11-Locating your Saved CMA’s

To locate your saved CMAs:

1. Click **My Matrix** tab.
2. Click on the “CMAs” link.

3. Matrix will bring you to your saved CMAs screen.
4. Click on the desired CMA name.
5. Click the **Edit Button** located to the right of the CMA Column.
6. This will take you to the **CMA Options** screen where you can select/deselect different pages, change your subject property information, make further adjustments, print your CMA, and/or resave your CMA.

13.12-Delete a CMA

To delete a CMA:

1. Click **My Matrix** tab.
2. Click on the “CMAs” link.
3. Matrix will bring you to your saved CMAs screen.
4. Click on the desired CMA name (to delete more than one CMA, hold down the **Ctrl** key on your keyboard as you click the CMA names).
5. Click the **Delete** Button. Click the **OK button** in the pop-up confirmation box.

13.13-Manage CMAs

Within the **My Matrix** tab, you can manage your saved CMAs. The **Manage CMA** page allows you to edit previously saved CMAs or print a saved CMA. (To learn more about creating CMAs, see Chapter 13).

You can revise existing adjustments or add adjustments to existing listings in saved CMAs. Additionally, you can revise the existing Subject Property or create a new one as part of a saved CMA.

(Note: You cannot add or delete any of the comparable listings that were originally saved with the CMA)

If you do not make any modifications to the existing saved CMA, the report will reprint the CMA exactly as it did when it was initially saved.

Within the **My Matrix** tab, click on the **CMAs** link. On this screen you can do either of the following:

Go to a saved CMA

- 1) Click on the name of the CMA you want to retrieve.
- 2) Click on **Edit**.

This will take you to the CMA Options page. (To Print CMAs, see Chapter 13)

Delete a saved CMA

- 1) Click on the name of the CMA you want to delete. To select more than one CMA to delete, hold down the **Ctrl** key on your keyboard as you click the CMAs.
- 2) Click on **Delete**. Click the OK button in the confirmation box. The selected CMA(s) will be deleted.

Chapter 14: Saved Searches/Market Updates/Auto Email

This section contains all your previously saved searches (Chapter 5). The **Saved/Automatic Searches** link is where your saved searches are maintained and also where you run your market updates.

Within the **My Matrix** tab, click on **Saved/Automatic Searches**

For each search, the search name is the first thing listed, followed by any description you entered, a series of links, contact name and date last run, and the Auto Email status (if set).

14.1-Changing the Saved Search Settings

To change the search name, description or primary email contact:

- 1) Click on the “Settings” link.
- 2) This will take you to the **Save Search** screen. From here you can type in a new name or description for your search, or select a different primary email contact.
- 3) Click the **Save** button. This new name, description, and/or Contact has now been saved.

Making a Copy of a Saved Search

To make a copy of a saved search, follow these steps:

- 1) Click on the “Settings” link.
- 2) This will take you to the **Save Search** screen. At the bottom of the screen, click the **Save As a Copy** button.
- 3) You will now be back to the main Saved Searches screen. A copy of your search will be listed there. It will have the same name as the original search with the addition of “copy 01.”
- 4) Click the “Settings” link on the copy. Change the name, description and primary Contact if you wish.
- 5) Click the **Save** button.

Viewing the Search Criteria

To view the criteria for a saved search, follow these steps:

- 1) Click on the “See Criteria” link. This will take you to a screen showing all the criteria you set for the search.
- 2) If you want to go back to your Saved Searches list, click the **Cancel** button.
- 3) If you want to make changes to the search criteria, click the **Revise Search** button.
- 4) Follow the steps below to revise the criteria.

14.2-Revising the Search Criteria

To make changes to the search criteria of a saved search, follow these steps:

- 1) Click on the “Revise” link. This will take you to the search screen with your original search parameters all filled in.
- 2) Make any changes to the search parameters you wish.
- 3) When finished, click the **Save** button. This will take you to the settings screen where you can make other changes, such as search name, description and primary Contact.
- 4) When finished, click the **Save** button. This will take you back to the Saved Searches screen with all of your changes saved.

Running a Full Search

To run a full search without regard to the last date you ran the search, click the “Full Search” link. Matrix will run the search and take you to the search results page.

Running a Time-Stamped Search

To run a search for all new and updated listings since you last ran the search, click the “Date Since” link. Matrix will run the search and take you to the search results page. Click the “Back to Saved Searches” link at the top of the screen to go back to your Saved Searches list. You will see that your saved search timestamp has automatically been updated.

Running a Market Update on One or More Saved Searches

With “Market Update,” you can get new and updated listings for one to ten saved searches at one time. Use the most recent timestamp or set your own date.

1) For a single Market Update, click the “Market Update” link. Or, to do up to 10 at once, click the select box next to each search you want to update. Click the **Update Selected** button.

2) This will take you to the **Market Update Options** screen.

3) Click to select an Update Type. Hold down the **Ctrl** key on your keyboard as you click to select more than one.

Status: Will return matching listings that have had a status change.

List Price: Will return matching listings that have had a list price change.

New: Will return matching listings that have been newly entered onto the MLS.

Other: Will return matching listings that have had any other changes to fields in your search criteria. Leave the “Or” default selection to **include** the Update

Types you have highlighted. Click to select “Not” if you want to **exclude** the Update Types you have highlighted.

4) To run your Market Update(s) based on the last date run for each search, leave “Use Last Run Date” selected.

5) If you want to set your own date, type it into the “Specify Update Date/Range” box. If you want everything from a certain date through today, be sure to put a plus sign (+) after the start date.

6) Click the **Run Update** button. Your selected searches will now run, and you will be returned to the **Saved Searches** page.

7) Each updated search will have a new link below it.

8) The link indicates how many new/updated listings you have for the search. Click on the link to view those new/updated listings.

9) When you are finished working with the search results, click the “Back to Saved Searches” link at the top of the search results screen. This will take you back to the Saved Searches screen where you can view the search results from your other market updates.

14.3-Deleting a Saved Search

To delete a saved search, follow these steps:

1) Click in the selection box to the left of the Saved Searches you want to delete.

2) Click the **Delete** button.

3) Click on **OK** in the confirmation window All selected Saved Searches have now been deleted

14.4-Auto Email

Allows you to set up a saved search to automatically email new listings or listings that have changed in status or price to a contact. Matrix will send them out as soon as they are entered into MLS or a change has been made to an existing listing if it matches your saved search criteria. As a result, your Contact will likely get multiple emails throughout the day.

Note: There is a limit of 500 listings that can be sent per email.

Enable Auto Email

To turn on Auto Email for a contact:

1) From the Saved Searches page, click on the “Settings” link next to the search you want to enable for Auto Email.

- 2) Click on the **Enable Auto Email** button.
- 3) Select a Primary Contact (if not already selected).
- 4) Fill in CC: or BCC: if needed.
- 5) Click in the box next to **Send to Me:** if you would like a copy of every Auto Email that goes out.
- 6) “Available for Reverse Prospect” is automatically selected. This allows List Agents to see if your search criteria matches any properties they have listed. They cannot see any information on your client, only that you have a search saved for which their listing is a match. Click to uncheck this box if you do not want this feature enabled.
- 7) Type in a Subject line.
- 8) Select the **display** you would like to email. Click on the down arrow for a list of choices.
- 9) An initial *Welcome Email* message and a new *Recurring Email* message be configured for each Auto Email. The Welcome Email is sent with the first auto email sent, while subsequent auto emails will use the Recurring message.

Save a New Auto Email

Recipients

Contact: Services, HMLS Data ▼ [Create a New Contact](#)
 To: datasvcs.at.heartlandmls.com@mailinator.com (Services, HMLS Data)
 CC:
 BCC me a copy of all emails

Message

Subject: Olathe 4+ Bed 4.1+ Batch 3+ Gar

Welcome Email
Recurring Email

Salutation: Hello HMLS Data, [Edit](#)
 Message:

Welcome to "The Portal"!

All messages I send to you containing MLS listing information - those I send you manually as well as those I set our system to send you automatically - will contain a link to your personalized page on The Portal.

You can access The Portal with your favorite web browser, where you'll be able to view the MLS listing information I've prepared for you in several different formats. For your convenience, you'll be able to sort these listings, rate them and categorize them. You'll be able to see all

[Check Spelling English](#)

 Signature: Thanks,

Rob Wagoner
 Data Services Manager
 Heartland Multiple Listing Service
 913-661-1600

[Edit Your Signature](#)

10) Instead of displaying an empty message box when creating a new auto email, Matrix now displays the predefined message text that appears to the recipient. (In prior versions of Matrix, this message box was blank, but the recipient would still receive the predefined message.)

Welcome Email
Recurring Email

Salutation: Hello HMLS Data, [Edit](#)

Message:

One or more new/updated listing(s) match your search criteria:

[Check Spelling English](#)

11) Select the frequency with which you want emails to be sent to your client.

12) Click on the **Save** button.

Disable Auto Email

To turn Auto Email off for a contact:

1) From the Saved Searches page, click on the “Settings” link next to the search you want to disable for Auto Email.

2) Scroll down to the bottom of the screen and Click on the **Disable Auto Email** button.

3) Click on the **Save** button.

You can open each Auto-Email search by clicking the search name or the triangle next to it.

From there you have access to your options such as Run, Market Update, Open in Portal, etc.

The Code is the unique ID number for your Auto-Email that is used for Reverse Prospecting.

Hover your mouse over an icon in the Status column for a pop-up definition. For example, the green checkmark means the Auto Email is active (and will also tell you when it is due to be sent out next).

The red exclamation point means that your client has disabled the Auto Email.

14.5-Hot Sheet and Market Watch

Two great features that are very similar and can really kick start your business are the Hot Sheet

and Market Watch. Both are found on the Home Page of Heartland MLS and are fairly easy to

use. The Hot Sheet will give you updated listings in a criteria that the agent can customize.

Many agents use this function to track expired or to compare sold properties verse newly listed

properties. The Market Watch is a system updated graph that appears on the agents home

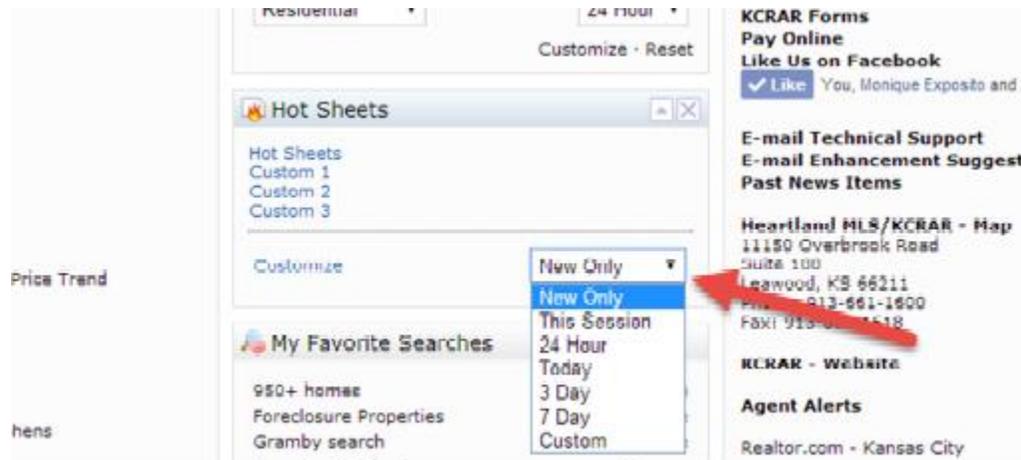
page. This will keep the agent informed of what is happening in their area with a quick glance at their home page.

14.6-Hot Sheet

To customize the Hot Sheet an agent will need to do the following steps.

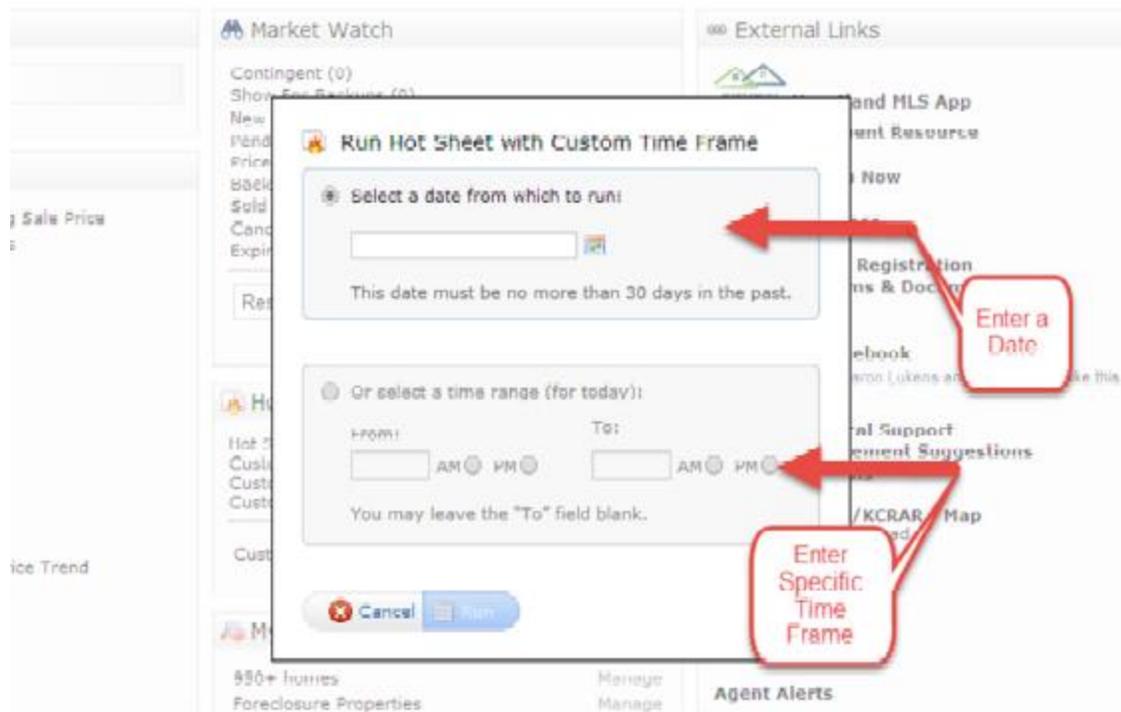
1. Go to Heartland MLS Home Page.
2. On Hot Sheet widget click “Customize” button.

3. Select criteria that agent wants to track.
4. Click "Save"
5. Click "Done" (Will now be back on Home Screen)
6. The Hot Sheet function has always used just a "Days Back" setting but now you have several options for the "Days Back" setting. Rather than save a "Days Back" setting separately for each Hot Sheet in the criteria page, the user now sets the "Days Back" on the home page when running the Hot Sheet.



The menu of "Days Back" options includes the following:

- o New Only – Only shows listings which are New/Changed since the last time the user ran a Hot Sheet.
- o Example: If a user logs in at 9:00 AM and runs the Hot Sheet, then later within the same session runs it again, this option would show only listings new/changed since 9:00 AM.
- o This Session – Only shows listings which are New/Changed since the last time the user ran the Hot Sheet in a prior session.
- o Example: If a user logs in at 9:00 AM and runs the Hot Sheet and sees 50 listings, then later within that same session runs it again, this option would show them those same 50 listings PLUS any New/Changed listings since 9:00 AM.
- o 24 Hour, Today, 3 Days, 7 Days – Only listings which are New/Changed in the specified time frame.
- o Custom – This allows the user to set a custom date or time range of current date from which to run within the last 30 days.
- o NOTE: Custom date or time settings are one-off searches and are not saved.



14.7-Market Watch

To Customize the Market Watch

1. Go to Heartland MLS Home Page.
2. On Market Watch widget click “Customize” button.
3. Select criteria
4. Click “Save”
5. At the bottom of the Market Watch widget an agent can customize the time frame from the drop down menu.

Chapter 15: My Listings and Reverse Prospecting

Within **My Matrix**, the **My Listings** link takes you to a summary screen that gives you a quick way to view all listings for which you are the Listing or Selling Agent, or Co-List Agent. You can view your Active and Off Market listings by property type.

For example, if you want to see all of your active listings within the Single Family property type, select “My Active Single-Family Listings” from the “Change to” drop-down box.

If you want to get all the buttons/functionality you have with a regular search, click the link “Click here to run this as a Full Search.”

15.1-Reverse Prospecting

Reverse Prospecting allows you to select a listing (one at a time) and viewing information on

Saved Searches other agents have set up for their clients for which your listing is a match. To run Reverse Prospecting on one of your listings, click to select the listing, then click the **Reverse Prospect** button.

Your Reverse Prospecting results shows you all the Agents with Saved Searches (set for Auto-Email) for clients where your listing is a match. You may now contact these agents to discuss the property you have for sale and how it may meet their client's needs. The agents' email address and phone numbers are displayed.

To access:

My Matrix

My Listings

Reverse Prospecting

Sortable Columns: User can click on column headers to sort results.

Agent Name: Click on agent name to send an email.

Pre-Approved Flag: Displays a checkmark if the contact has Mortgage pre-approval. The agent sets this flag for each of his contacts. (see next image)

Date Sent: Indicates when the contact was notified of your listing.

File Folder Icon:

- o Heart icon will be displayed if the referenced contact flagged your listing as a Favorite

- o Light Bulb icon will be displayed if contact has flagged your listing as Recommended

- o If the contact discarded your listing – that contact's Agent and Reference number row will not appear in the Reverse Prospecting Results.

Setting Up Contacts for Reverse Prospecting

When entering a new contact, make sure to click in the Box "Enable Reverse Prospecting".

Complete the boxes displayed. Next, click on "Show All Fields" to get to more information.

Chapter 16: Contacts

Within the **My Matrix** tab, there is a **Contacts** link where you can store all of your clients' contact information. If you have contacts entered into Matrix, you can quickly email listings to them and set-up **Auto Email**. You can also attach **Saved Searches** and **Watched Listings** to your contacts.

16.1-Adding a Contact

To add a contact, follow these steps:

- 1) Click on **Add Contact**

- 2) Enter personal, home and business information, email addresses, and any notes you want to save. First name, last name and email address are required.

- 3) Click on **Add**.

(Note: You can enter in multiple email addresses for a contact by separating each email address with a comma.)

Viewing your Contacts

To view the contact information for a particular client, click on the client's name. Matrix will display all of the information entered for that specific contact, including personal, home and

business information, any Saved Searches you created for the Contact, and a link to the Email history.

Notice that the e-mail address is a hyperlink so you can e-mail your contact from this screen. Any notes that you have entered on a contact will appear under the **Notes** section.

16.2- Contacts: List, Sort and Search

Click the My Matrix tab, and then click the Contacts link to open a list of all your Contacts.

Columns from left are select box, Name, Email Address, number of Auto-Emails, number of Saved Searches, my last use

(activity) for that Contact, the Contact's last Portal visit, number of listings Contact has marked in their Portal as

Favorites, number marked as Possibilities, and number Discarded.

Click any column header to sort all your Contacts by that field (default sort is by last name).

If you have a very long list of Contacts, start typing the Contact's name in the Search box at the top. As you type, your

Contacts list will narrow to match what you type.

16.3-Contacts: Using Filters

Filters are a great way to narrow your Contacts list according to a specific criterion. Click on the Filter Contacts dropdown box and then select one of the options:

For example, select "who have not visited their portal" to see who you may want to call to find out why they are not viewing their listings. All of the filters are great for targeting your follow-up activities.

16.4- Contacts: Working With

To expand a Contact and view/edit all items assigned to that Contact, click the Contact's Name or the triangle to the left of the Contact's name.

Here you have access to the Contact Details, Auto-Emails, Saved Searches, CMAs, Sent Emails and Net Sheets. Click the triangle next to the section you want to work with.

Details:

Click the "Edit Contact" at the bottom to change anything in the Details section.

Chapter 17: Custom Displays

Within the **My Matrix** tab, there is an option to create your own custom single line displays.

This function allows you to choose which columns appear on the Search Results screen. You can also choose the order in which the columns appear on the screen and the column labels.

Table Type:

In Matrix, you can search for Listings or Tax Records. On the search result screens, you may want different information to be shown. Because of this, Matrix allows you to have various custom displays for the types of searches that you perform. At the top of the Custom Displays screen you will see the pick list. Make your selection from the Table Type pick list. Select listing or tax depending on where you want to create the report. If creating the display for MLS listing data, click on listing. If you want to create a display for tax public records, click on tax. After you create displays, each Table Type has its own screen which contains the reports you have

created. Therefore, if you see **Listing** in the Table Type pick list you will not see any of your **Tax** displays. You have to first select **Tax** from the Table Type pick list to view your Tax reports.

Listing – Displays for the search result screen on the tab.

Tax – Displays for the search result screen on the tab.

Table:

The different Property Types are referred to as “Tables.” For example, you would not want the same custom displays for viewing Residential listings that you would for Lots & Land. The Table pick list allows you to have different custom displays for the different property types.

To choose a specific Property Type, select it from the **Table** pick list.

Your choices in the **Table** pick list are dependent upon the Table Type you are viewing. For the

Listing Table Type, you have four different Property Types you can choose from, as well as Cross Property. For the **Tax Table Type**, **Tax** is the only choice in the **Table** pick list.

Each of the Tables has its own screen. This means that if you are viewing the Lots & Land Table, none of your Single Family column reports will be viewable. Once you have selected the right **Table** and **Table Type**, you are ready to do any of the following:

17.1-Create a Custom Display

To create a custom display, follow these steps:

- 1) Select the **Table** and **Table Type** to which you want to add the custom display.
- 2) Click on **Add**.

Once you do this, you will be taken to the **Build Custom Display** screen. At the top of the page, you will see the Custom Display Name box.

Click in the box and type a name for this custom display.

Next, you will see the **Available Fields** containing all of the fields that are available for this Table Type. To the right you will see that the **Selected Fields** box, which will contain all of the fields you have chosen. See an example of this screen on the next page.

17.2-To ADD fields to your custom display

- 1) Click on the field in the **Available Fields** box that you want to include in this custom display.
- 2) Click on **Add** (or double click the field name).
- 3) Repeat these steps until all the fields you want on this display are in the **Selected Fields** box.

To REMOVE fields from your custom display:

- 1) Click on the field in the **Selected Fields** box that you want to remove.
- 2) Click on **Remove** (or double click the field name).
- 3) Repeat these steps until all the fields you want to remove are no longer in the **Selected Fields** box.

To CHANGE THE ORDER of the columns:

- 1) Click on the field in the **Selected Fields** box that you want to move.
- 2) Click on **Up** to move it up in the list.

-OR Click on **Down** to move it down in the list.

- 3) Repeat the above steps until the fields are in the order in which you would like them to be displayed on the search results screen.

To RE-LABEL any of the columns:

Each field has a default label for the column heading. You can change any label.

- 1) In the **Selected Fields** box, click on the field you want to re-label.
- 2) Click in the **“Label”** box on the right side of your screen.
- 3) Drag your cursor to highlight the label, and type in whatever label you choose.

To CHANGE THE WIDTH of a column:

Each field has a default width set that should work well for your report without adjustment. However, if you do want to adjust a column width, you may do so.

- 1) In the **Selected Fields** box, click on the field you want to resize.
- 2) Click in the **“width”** box on the right side of your screen.
- 3) Drag your cursor to highlight the current width and type in whatever width you choose.

Note: Width is expressed in “pixels”, a unit of measurement for screen displays. If you are not familiar with pixels, you may need to do some experimenting to get a feel for them. 50 pixels equals approximately 1 inch (on a 1,024 x 768 pixel display).

To ALIGN a column:

Each field can be set to align left, right or centered. If you do not make a selection, the default is left alignment.

- 1) In the **Selected Fields** box, click on the field you want to align.
- 2) Below the **“Width”** setting, click the **“radio button”** circle next to your selection of Left, Right or Center. This will place a black dot in the circle and signifies that alignment is chosen.

Adding Special Columns:

Below the **Column Report Fields** box you will see the following **Special Columns** selection list:

- Checkbox
- Watch
- Map Icon
- Photo Icon
- Link to Full

Here you can add **Special Columns** to your column report. You will recognize these from the Matrix Single Line Summary screen. You have the choice of which of these columns you want to display. Here is a breakdown of what each of these items/icons mean:

Check Box –

Will display a check box to the left of the listing for selecting that particular listing.

Watch – Will display an icon of Binoculars to the left of the listing so you can add listings to your Watched Listings List.

Map – Will display a map icon to the left of the listing so you can view the location of the listings.

Photo – Will display a camera icon to the left of the listing so you can view the photo(s) for the listings.

Link to Full – Will display the MLS number link so that you can view the full listing.

Click in the check box to the left of any of the columns you would like to include on your report. Any items you choose from the **Special Columns** list will be the first columns to appear on your search result screens. Click on **Save** when you are done creating this custom display. This will save the display and take you back to the Manage Custom Displays screen. Click on **Cancel** to return to the Manage Custom Displays screen without saving this custom display.

17.3-Editing a Custom Display

- 1) Select the **Table Type**, listing or tax, column report you would like to edit.
- 2) Select the **Table**, Single Family, Multi-family, Lots and Land, Commercial or Cross Property, of the column report you would like to edit.
- 3) Click the **Custom Display Name** that you would like to edit
- 4) Click on **Edit**.
- 5) Make any changes to this custom display.
- 6) Click on **Save**.

Changing the order of the Custom Displays:

All your custom displays will be added to your **Display Format** pick list when running searches. When you change the order they appear in on the **Manage Custom Displays** screen, they will be changed to that order the **Display Format** pick list.

Follow these steps to change the order in which your custom displays will appear:

- 1) Click the name of the **Custom Display** you want to move
- 2) Click on **Move Up** to move it up **-OR-** Click on **Move Down** to move it down
- 3) Repeat the above steps until the custom displays are in the order in which you would like them to appear.

Deleting a Custom Display:

To delete a custom display, follow these steps:

- 1) Select the **Table Type** and **Table** of the custom display you would like to delete.
- 2) Click the **Custom Display Name** that you would like to delete
- 3) Click on **Delete**.
- 4) Click on **OK** in the confirmation window. That custom display will now be deleted.

Viewing your Custom Display:

To access and view your display, follow these steps:

- 1) Perform a search for some properties and process the search by clicking on the Search button.
- 2) Click on the pick list down arrow next to the **Change display to:** and select the name of your custom display by clicking on it.

Note: your customized displays will appear at the top of the list with a "my:" prefix in front the name of the display.

Selecting Custom Display from Search Results

Editing your Custom Display from the Search Results screen:

To edit your custom displays, follow these steps:

- 1) From the search results screen with your custom display selected, click on the **Edit** link next to the Displays pick list (at the bottom of the screen).
- 2) This will bring you to the **Manage Custom Displays** screen.
- 3) From here you can add or remove fields to the **Selected Fields** box, select or deselect special column icons, change the label or width of the columns, and/or move fields up or down in the report fields box.
- 4) If you wish to rename your report, click in the text box labeled **Custom Display Name** and give this display a new name. If you want to keep the display the same name, click on the

Return to Search button. If you have renamed your display, now you may click on the **Save** button. See screen on next page.

Printing the Custom Display

- 1) When you have your search results displayed using your Custom Display, click the checkboxes next to the listings you want to print in your custom display format. If you want to print them all, click the “Check all...” link at the top of the screen.
- 2) Click the **print Friendly** button. Your selected listings will pop-up in a new window in your Custom Display format.
- 3) If you have a lot of fields stretching across the screen, click the “**Change Layout to Multi Line**” link at the top of the screen. This will ensure that none of your fields are cut off the printed page.
- 4) Click the “**Print**” link at the top of the screen to send the display to your printer.
- 5) When finished, click the “**Close**” link at the top of the screen.

Chapter 18: Settings (Email Signature and Custom Headers/Footers)

The **Settings** screen is where you can personalize your **email signature** and select a **custom header/footer**.

Agent Information Management Consolidation Screen

Matrix now provides a screen for agents to manage the information that appears in the Portal, Agent

Header/Footer, and the CMA cover sheet all from one central place under My Matrix>Settings>My

Information.

Please Note any information entered on this screen will NOT change the Roster information. If you need to change your personal agent information, please contact our membership department.

Information Header & Footer Mobile Header CMA Cover Sheet Portal Information Email Signature

This page allows you to manage the personal information used by Matrix. For each of the fields below you can either use the value from your roster entry, if there is one, or enter a value manually. **It is recommended that you use the roster value whenever one is available.**

		Override?
First Name:	Cathy	<input checked="" type="checkbox"/>
Last Name:	Holefelder	<input type="checkbox"/>
Public Email Address:	cathyh@heartlandmls.com	<input checked="" type="checkbox"/>
Title of Employment:	Senior VP	
Cell Phone Number:	(913) - 555 - 5555	<input checked="" type="checkbox"/>
Pager Number:	913-222-2222	<input type="checkbox"/>
Fax Number:	913-661-1618	<input type="checkbox"/>
Toll Free Number:		
Direct Office Contact Number:		
Agency/Office:	Heartland MLS	
Office Phone Number:	913-661-1600	
Office Email Address:	heartland@heartlandmls.com	
Office Fax Number:	913-661-1618	
Office Mailing Address:		
Office Site:		
Office City Location:		
Office Prov Location:		
Office Postal Code:		
Office Website:	matrix.heartlandmls.com	
Public Contact Number:	913-661-1600	<input type="checkbox"/>
Tag Line: (i.e., Slogan)	Serving the Greater Kansas City area	
Additional Information:		

18.1-Entering your Email Signature

Your email signature will appear at the bottom of all the emails you send from Matrix. You can save your name and contact information in this section so that you will not have to type it in each time you send an email.

Follow these steps to enter or modify your email signature:

- 1) Click on **My Matrix**.
- 2) Click on the "Settings" link.
- 3) Type or modify your email signature
- 4) Click on **Save Email Signature**.

Your email signature will now be saved.

18.2-Custom Header/Footer, Including Agent Photo

You can now designate a custom graphic header and footer that will appear on various displays and print reports. Use one of the ready-made templates, or create and upload your own. For either option, you can upload your agent photo! Click the "My Matrix" tab, then the "Settings" link (from the main window or the blue submenu below the tabs). The Header/Footer section is below the Email Signature section. To get started, click the link "Click here to select a new Header/Footer package." Click to select the template you want to use, or click "Upload custom header/footer images if you want to upload your own. Then scroll to the bottom of the screen and click the "Continue" button.

Complete the details section. You can click the link at the top to automatically fill all your information from the agent roster. Then overwrite whatever you want to change and fill in any blanks. None of the fields are required, so you may leave off any that you do not want to display. If you want to include a photo, you may upload one in the “Your Photo” section. Click the “Browse...” button to locate and select your photo from that you have saved on your computer. Click the “Upload” button to upload your photo to your template. NOTE: Your photo should be 66 x 79 pixels. You can upload a different size, but the system will automatically scale/pad it to the appropriate size which could distort your image. It’s better if you do the sizing yourself beforehand using a photo imaging program.

After you click the Upload button (or the Preview button at the bottom of the screen if you’re not uploading a photo), a preview of your template will display at the top of the screen.

Make any changes you want in the Details section, then click the “Save” button at the bottom of the screen to save your template. If you have previously uploaded images for a custom Header/Footer, saving this package will overwrite those images.

After saving your template, the text on the My Matrix>>Settings screen changes to reflect the name of your template selection, with links to change the current one or select a new one to override the current. After your template is saved, it will automatically display on various screen displays and reports.

18.3-Uploading your own custom template

Perhaps you want to create your own template with your company logo or other graphics.

From the Header/Footer Package selection screen, click to select the option for “upload custom header/footer images” and then click the “Continue button at the bottom of the screen.

There are four custom images you can upload: Header and Footer (for screen displays); and Print Header and Print Footer (for print reports). Note that each has a required image size (745 x 85 pixels for Header/Footer, and 670 x 85 pixels for Print Header/Print Footer). Click the “Browse...” button in each box to locate and select the custom images you have created. Click the “Upload” buttons to upload and preview your graphics. When you are finished, click the “Save” button at the bottom of the screen.

Chapter 19: Tax Search

To conduct a tax search using Matrix, click on the tab.

There are three different tax searches: **PID Number; General; and Full**. Each of these searches is customizable by adding and removing additional search fields.

PID # Search – allows you to search for properties via the property identification number from the tax public records.

General Search - allows you to search for properties via the following fields; County, House Number, and Street Name. Also includes Map Search (see Chapter 2, page 7 for instructions).

Full Search – allows you to search for most common fields available in the tax database as shown below. Also includes Map Search (see Chapter 2, page 7 for instructions).

Performing a Tax Search

To perform a search, select one of the search links described above; **PID#, General or Full**. Enter your search criteria, click on the blue **Search** button (or press the “Enter” key on your keyboard).

Customizing your Tax Search Screen:

Keep in mind each search is customizable by adding and removing additional search fields. Within each search, PID#, General and Full, there is an option for adding and removing search fields. If you would like more search options in the tax section, click on this blue link. For more information on how to add additional search fields, please see

Tax Search Results

From the results screen, click on the blue **PID number link** to get the **Full Tax Display** for that property. Remember that each county tracks different information so you may not always find the same information as you move between counties.

Full Tax Display

After clicking on the blue PID# link, you will get a **Full Tax Display** on that property from the county.

Notice the blue buttons at the bottom of the **Full Tax Display** are similar to the ones you have already used in other areas of Matrix, with the exception of Reports/Labels.

Reports

Enter search criteria into one of the three search options, depending upon your search criteria. If you're pulling a list of properties/names on a certain street, you might select the county, enter in the street name (remember to use the * as the wildcard), and the city.

When processing a large number of names/properties, it is a good idea to select the

Show to 100 per page so you can view more per page.

To Process Search:

Click on the blue **Search** button or press the "Enter" key on your keyboard, to run your search.

Selecting Names/Properties:

To select all of the names/properties from your search results, click the "Select all ..." link (where "..." is the number of search results). If you have more than one page of results, clicking this link will select them all. Notice how each of your names is selected with a check box in front of each property. You will also notice that each of the names selected is highlighted blue.

De-selecting Names/Properties

If there is a name you would not like to include in your mailing labels, simple click in the box to the left of that property. If you want to deselect them all, click the "Un-check all ..." link at the top of the screen.

Chapter 20: Open Houses

Conducting the Search

1. Click on the "Open House" tab to search for Public and Broker Open Houses.
2. Select the criteria you want to search on. To select multiple criteria, hold down the "Ctrl" key as you click on your choices.
3. Select the date range you want to search. For Start Date, you must type a plus sign immediately after the date, for example 7/1/2004+. For End Date, you must type a minus sign immediately after the date, for example 7/15/2004-. (In this example, you would get all open houses that are scheduled anytime during the period of 7/1/2004 through 7/15/2004.)

4. As with property search there are a number of parameters you can set. Click the first drop down box on the left to display how many results you want displayed per page. For the Single Line, you can display up to 100. For the Full, one open house is displayed per page. Click the "Search" button or press the "Enter" key on your keyboard to execute your search.

Chapter 21: History

Conducting the Search

1. Click on the "History" tab to search for the listing History of one or more properties. This is particularly helpful for seeing what Status and MLS number changes have been made to a property over time.
2. Select the criteria you want to search on. To select multiple criteria in a list box, hold down the "Ctrl" key as you click on your choices. If searching on Street, be sure to type an asterisk immediately after the Street Name.
3. As with property search there are a number of parameters you can set. Click the first drop down box on the left to display how many results you want displayed per page. You can display up to 100. Click the "Search" button or press the "Enter" key on your keyboard to execute your search.

Viewing the Results

The results show the MLS activity for each property in your search. The Old Value/New Value Columns show what was changed.