Contacts

To add or revise a Contact:

1. Click the "**My Matrix**" tab.
2. Click the "**Contacts**" link.
3. Click the "**Add** " button. (To revise a Contact, click the "**Edit**" link under the Contact's name.)
4. Fill in as many fields as you wish. Be sure to fill in the email address field so that you can email listings to the client.
5. Click the "**Save**" button (same for editing a Contact).

To delete a Contact:

1. Click the "**My Matrix**" tab.
2. Click the "**Contacts**" link.
3. Click to place a check mark in the select box next to each Contact you want to delete.
4. Click the "**Delete**" button.
5. Click "**OK**" to confirm.

Tax

How do I search the Tax records?

1. Click the "**Tax**" tab, then select any of the available Tax searches.
2. Tax search is very similar to listing search. When searching by an Owner's name, most counties list last name first. Use the asterisk * (wild card search) to account for name variances that might be in the tax record. For example, if the name is Timothy Jones, enter jones*tim*. The first asterisk will ensure you find the record regardless if the name is entered as "Tim," Timothy," "Timothy R.," etc. The second asterisk accounts for the possibility of a suffix such as "Sr.," "II," etc. Use similar logic when entering the street name.

How do I create and print mailing labels?

1. Conduct a Tax search to find the records for which you want to create labels.(**Mo counties only**)
2. On the search results page, click the "**Check all XXX**" link
3. Click the "**Report**" button.
4. Click the Mailing label option and click **"Generate"**.
5. Your formatted labels will open in a new window. Select File>Print from the Web browser menu to print to your label sheets.

Main Navigation Tabs

Home	View News and important updates.
Search	Find listings that match your client's criteria. Save searches and be automatically notified of new property matches. Print and email listing reports and CMAs. View and print statistics and maps.
My Matrix	Check Watched Listings. Update and run saved searches. View your Active and off-market listings. Set-up and edit your Contacts. View your email history. Create your own custom single line displays. Manage your saved CMAs.
Finance	A variety of financial calculators.
Roster	Find contact information for other agents and offices.
Tax	Find tax records (where available). Quickly create mailing labels.
Input	Add and modify listings
Help	Link to users manual and instructions for a variety of Matrix tasks.
Logout	Log out of Heartland MLS Matrix.

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Quick Reference Guide

http://matrix.heartlandmls.com

To log on:

Type your Agent ID number in the **User ID:** box.

Type your HMLS password in the **Password:** box.

Click the **Login** button or press the **Enter** key on your keyboard.

Search

How do I?	By doing this…
Start a search?	Click the **Search** tab. Select **Property Type** (located right under the tabs in the blue bar—defaults to Single Family). Click any of the available searches (General, Detail, MLS #, etc.).
Select Area, County, or School District?	If you know the codes, type them directly into the input box with a comma between each one. If you need help finding a code, click the magnifying glass icon next to the input box.
Enter Street Name?	Always type an asterisk * (wild card) after the street name.
Enter number fields (Bedrooms, List Price, etc.)?	**3**…....Exactly 3 bedrooms **3-5**…3 to 5 bedrooms **3+**….3 or more bedrooms **3-**…..3 or fewer bedrooms For Price, enter number only (no dollar signs or commas).
Enter dates? (mm/dd/yy)	**10/31/08**……..for exact date **10/31/08-11/15/08**..for date range **10/31/08+**…everything since date **0-5**……..5 days back from today
Define a custom search area using the map?	Click the **Map Search** link. Zoom the map using the map controls, **Jump to** drop down box or Address. Click on the map and drag your cursor to draw a rectangle defining your custom search area. Click **OK**.
Add fields I use frequently?	Select **"Additional Fields Add/Remove."** In the Available Fields box, click on a field you want to add, click the **Add** button (or simply double click the field). Repeat as needed. Click the **UP** or **DOWN** buttons to rearrange the order. When finished, click **Return to Search**.
Execute Search?	Click the blue **Search** button or press **Enter** key on keyboard.

Search Results

How do I?	By doing this…
Add to Watched Listings?	Click the icon. Click **OK** button or select Contact and **OK**.
View photo(s)?	Click the icon.
View a map?	Click the icon.
Select a listing?	Click the select box. To select all listings on the page, click the select box in the column header bar. To select all search results, click the **Check all xxx** link at the top of the page.
View the Property Full Display?	Click the MLS Number link. Use the **Display** drop down box at top right of page to choose other displays.
Sort differently?	If you have 500 or fewer results, click the **Sort** button. Use the **Add** button to add fields from the left to your sort. Use the **Remove** button to remove fields from your sort on the right.
Plot multiple properties on a single map?	Select the properties you want to map. Click the **Map** button.
Narrow my results?	Select the listings you want to keep. Click the **Narrow** button to remove all non selected listings.
Save my search?	Click the **Save** button. Enter a Search name and description. If saving for specific client, select that Contact from **Primary Email Contact** list. Click the **Save** button. You will find your saved searches under the **Contact** list under **My Matrix** tab.
Revise my search?	Click the **Revise** button. Make desired changes and click **Search**.

Printing

Screen:

1. Select the listings you want to print.
2. At the top of the screen, select the Display you want to print (from the drop-down **Display** box).
3. Click the **Print HTML** button.
4. Select **File>Print** from the Web browser menu.

PDF Report:

1. Select the listings you want to print.
2. Click the **Reports** button.
3. Click to select the report you want to print.
4. Click the **Generate** button.
5. Select **File>Print** from the Web browser menu.

Emailing

To manually email one or more listings:

1. Select the listing(s) you want to email.
2. Click the **Email** button.
3. Select one of your **Contacts** or type an email address in the **To** box. Use commas to separate multiple email addresses.
4. If you want a copy sent to you, click to check the **BCC me a copy of email** box.
5. If **Customer Plus** report is okay to send, click the **Additional** link by Display.
6. Type in your subject and message.
7. Click the **Send** button.

To set up a client for Auto Email:

1. Create and execute a Search for your client.
2. Click the **Save As** button then **New Auto Email**. Select your client from the **Primary Email Contact** list.
3. Enter **Subject Line** information.
4. If you want copies sent to you, click to check the **BCC me a copy of all emails** box.
5. Select Scheduling options.
6. Click the **Save** button.

To disable Auto Email for a client:

1. Click the **My Matrix** tab
2. Click **Auto Emails** under **Contact** heading.
3. Click Down arrow in front of name and click **Settings.**
4. Click the **Disabled** option on this page.
5. Click the **Save** button.