Quick Start Guide

Matrix™ 12

cotality.com

Confidential to Cotality™

Contents

Introduction

Welcome . . . 1
Matrix™ Desktop Compatibility . . . 1
Matrix™ Mobile Compatibility . . . 2
A few things you should know. . . . 2
NEW in this Guide . . . 3
What's New in Matrix™ 12 . . . 3

Header

Navigation & System Tools . . . 4
Find Bar. . . . 5

My Matrix™

Dashboard . . . 6
Market Watch (Customize) . . . 8
Hot Sheets (Customize) . . . 8
Timeline . . . 10
Contacts. . . . 11
Contacts Dashboard . . . 12
Contacts > Auto Email. . . . 12
Contacts > Carts . . . 13
Contacts > CMA. . . . 13
Contacts > Sent Email. . . . 14
Contacts > Searches . . . 14
Contacts > OneHome Searches . . . 14
Contacts > Reverse Prospect . . . 15
Contacts (Add) . . . 15
Saved Searches . . . 16
My Listings. . . . 16

Settings

My Information . . . 18
Information . . . 18
Header & Footer . . . 19
CMA Cover Sheet . . . 20
Email Signature . . . 20
Agent Webpage . . . 21
OneHome™. . . . 22
Broker/Agent Choice . . . 22
Speed Bar Shortcuts . . . 26
Team Settings . . . 26
Hot Sheets . . . 26
Custom Displays. . . . 27
Custom Exports . . . 28
Portal Notification Settings . . . 28
IDX Configuration. . . . 29
Branding Settings. . . . 31

Search

Information Bar . . . 32
Criteria . . . 32
Criteria (Manage Fields) . . . 33
Map . . . 33
Property Preview . . . 34
View Photos. . . . 35
Map Layers . . . 36
Results . . . 38
Results (Manage Fields) . . . 39
Display View . . . 39
Action Buttons . . . 40
INRIX Drive Time™ . . . 41

CMA Manager

CMA Dashboard 43
Create CMA 44
Edit CMA 45

Stats

Stats (Preset) 50
Stats (Customize) 50
Stats (Save) 51

Auto Email

Auto Email (Create) 52
Concierge Mode 53

Listing Manager

Add Listing 54
Actions 54
Editor 55
Photos (Add New) 56
Documents (Add New) 57
Manage Listings 58

Matrix™ Mobile

Speed Bar 59
News 59
Search 59
My Matrix™ 61
Carts 61
Hotsheets 62
Concierge 62

Tips and Tricks

Home Panels 63
Market Watch 63
Hot Sheets 63
Criteria Search 64
Map Search 65
Search Results 66
Speed Bar 67
Recent Search 68
Contacts 68
Saved Search 69
CMA 69
My Listings 70
Settings 70
- My Information 70
- Email Signature 70

Custom Displays 71
Stats 71
Button Bar 71
Input (Add/Edit) 73
Multiple Tabs 73
- Android 73
- iPhone 74

Classic Matrix™ Quick Start Guide

This section offers user-guidance on how to access—and, utilize—Matrix's classic features.

The Branding Center Quick Start Guide

This section covers how to set your branding for client email notifications, the OneHome portal and the client app.

Introduction

Welcome

Whether you're a seasoned veteran or brand new to Matrix™, we'd like to welcome you to Matrix™ 12.

We understand that, at times, new or updated technology can be challenging so, we have created this Quick Start Guide to help.

This guide is designed to make your experience with Matrix™ 12 as smooth and seamless as possible.

With Matrix™ 12, you'll have access to a wide range of powerful new features and updated tools that will help you increase productivity and efficiency.

Matrix™ 12 is mobile friendly, cross-browser compatible and has long been considered, by many, the most intuitive property listing software available today.

Whether by developing efficiency-rich features or creating in-depth tutorials, we remain committed to bringing out the best in you.

Matrix™ Desktop Compatibility

Matrix™ X is compatible with the latest browser versions supported by mainstream operating systems. Operating systems and browsers such as Windows XP, Windows Vista and Internet Explorer 8 and 9 (IE8, IE9) are no longer in mainstream support. Anyone using a previous version of these browsers will see a warning at login to encourage upgrading. Browser-related issues that can't be resolved by upgrading to the latest version will be reviewed and resolved on a priority and best-effort basis. Cotality™ will support upgrades to browsers as soon as reasonably practical following availability of the new browser version in new retail computers.

Desktop users who choose to use Internet Explorer (IE) on Windows 7 and Windows 8 can upgrade to IE11. Windows 10 users can use IE11 or Edge Browser. Firefox and Chrome automatically update to their most recent versions regardless of underlying operating system. Matrix™ supports the following desktop browsers:

- Internet Explorer 11 and Edge Browser
- And the most recent versions of:
    - Safari
    - Chrome
    - Firefox
    - Android Browser
    - Chrome Mobile
    - Safari Mobile

Matrix™ Mobile Compatibility

iPad and Android tablet users should install the most recent version of their browser.

Matrix™ Mobile supports the following browsers:

- iOS Safari
- iOS Chrome
- Android Browser
- Android Chrome

Defects reported against other mobile platforms will be fixed on a best-effort basis.

A few things you should know.

Matrix™ is currently used by over 750,000 real estate professionals worldwide. However, because no two systems are exactly alike, some of the fields, data and images used in this guide may differ slightly from the application that you're currently working on. Rest assured, however, that the concepts are the same and that you will easily recognize the ones used here with those of your own.

Secondly, Matrix™ is an online Listing Management software system so you must be using an active Internet connection.

Finally, this guide is designed with a step-by-step approach, ensuring that each task is explained clearly and concisely. It's built to empower users to navigate Matrix™ with confidence, whether they're seasoned professionals or new to the system. If after using this guide, you're still unclear about anything you read, we invite you to check out the video tutorials listed in your system's "Help" section, in the Learning Lab or on YouTube (www.youtube.com/@CotalityMatrix™).

Enjoy.

The Matrix™ Team

NEW in this Guide

What's New in Matrix™ 12

1. The new CMA Manager replaces the classic CMA Wizard and allows for greater control of the creating and managing process.

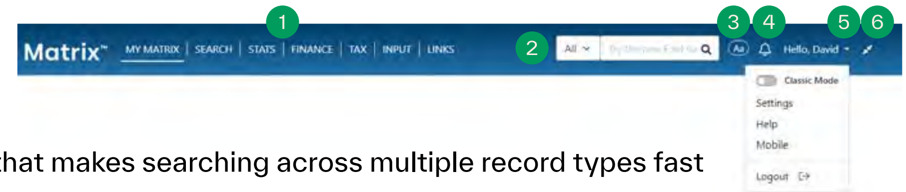
2. As Matrix™ features—and, by extension, the Quick Start Guide—continue to evolve, it can sometimes be a challenge finding help with the classic features.

   In this latest version of the Matrix™ Quick Start Guide, you'll find an entire section—just before "The Branding Center"—dedicated to "Classic Matrix™" features.

Header

Navigation & System Tools

The Matrix™ header serves as a gateway to various sections of the system — providing quick access to commonly used features.



1. **Features:** hover a menu item for additional options or a direct link to the page.
2. **Find Bar:** an all-in-one search tool that makes searching across multiple record types fast and easy.

   NOTE: *the Find Bar can only be accessed in Classic mode (for more information, see "Utility Menu" under "Navigation & System Tools" in the "Header" section).*

   NOTE: *for more information, see "Find Tool" in the "Navigation Header" section.*
3. **Text Size:** toggle between large, medium and small text sizes across all responsive pages in Matrix™.
4. **Notifications:** view items that may need your attention.
5. **Utility Menu:** select your name to view additional Utility Menu options.

   Classic Mode: when enabled, switches Matrix™ to its legacy features.

   Settings: access user-specific Matrix™ settings.

   Help: find additional Matrix™ resources.

   Mobile: open a light, mobile-friendly version of Matrix™.

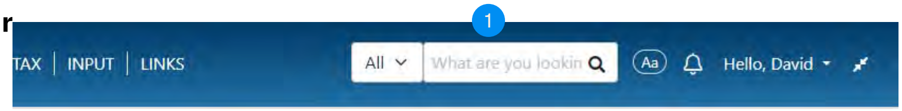
   Logout: sign out of your Matrix™ session.
6. **Header Height:** collapse and expand the Matrix™ navigation header.

Find Bar

The Find Bar is all-in-one search tool and global search experience for Matrix™ — making it fast and easy to **search across multiple record types from a single field** and instantly find any resource you're looking for.

1. From the header, select the **Find Bar**.

   NOTE: *the Find Bar can only be accessed in Classic mode (for more information, see "Utility Menu" under "Navigation & System Tools" in the "Header" section).*



2. From the Find Bar, **search** by:

   Recent Searches: instantly access a collection of recent search activity

   Recent Contacts: instantly access your most recently used contacts

   Recently Viewed Listings: instantly access your most recently viewed properties

   Address: for matching a single listing or public record

   MLS number: for matching a property belonging to any status

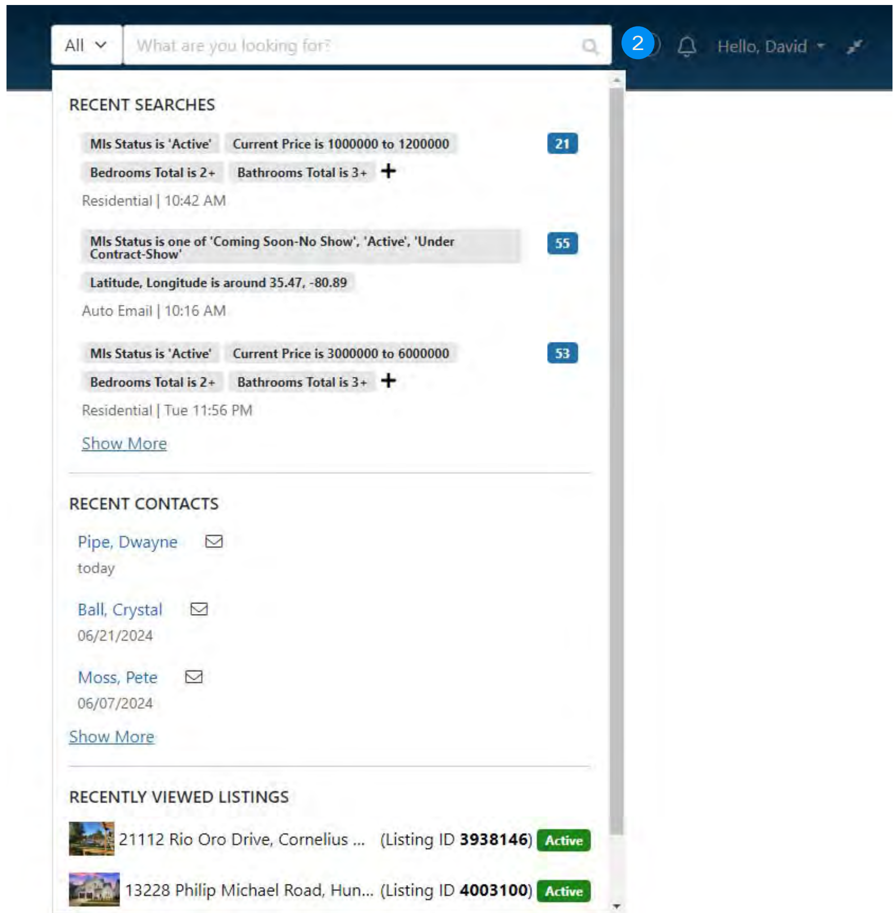
   Contact: for quickly finding a specific contact

   Agent: for quickly finding a specific agent

   Office: for quickly finding a specific office

   Saved Search: for quickly finding a saved search

   NOTE: *select the "Show More" option to view additional results.*



3. Select the dropdown to filter a **specific record type**.

My Matrix™

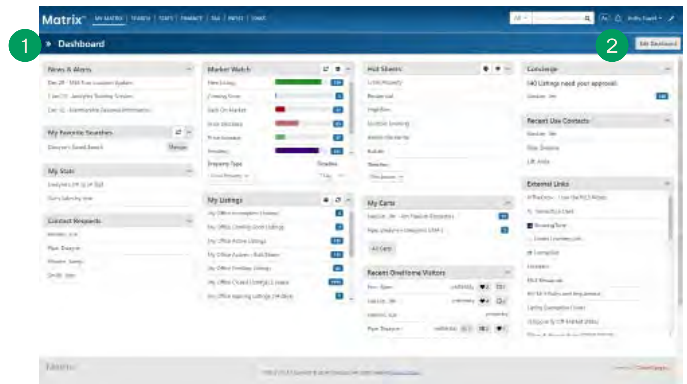
Dashboard

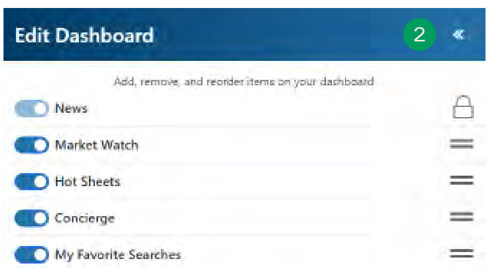
1. Select the **chevron** to open the portal activity Timeline.

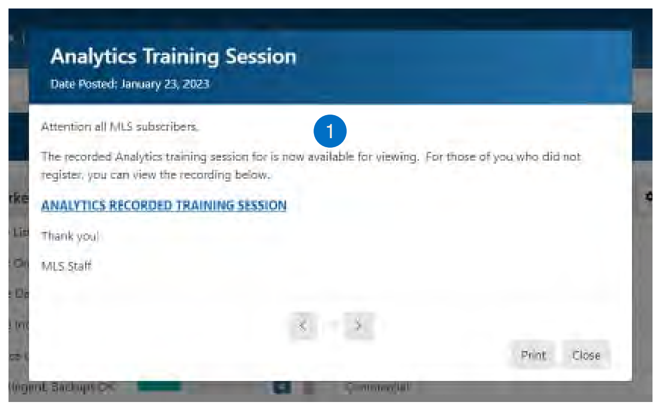
   NOTE: *for more information, see, "Timeline" in the "My Matrix™" section.*

2. Select the "Edit Dashboard" button to **enable**, **disable** and **reposition** all Dashboard panels.

   NOTE: *the News and Alerts panel will not be visible if there is nothing to display.*



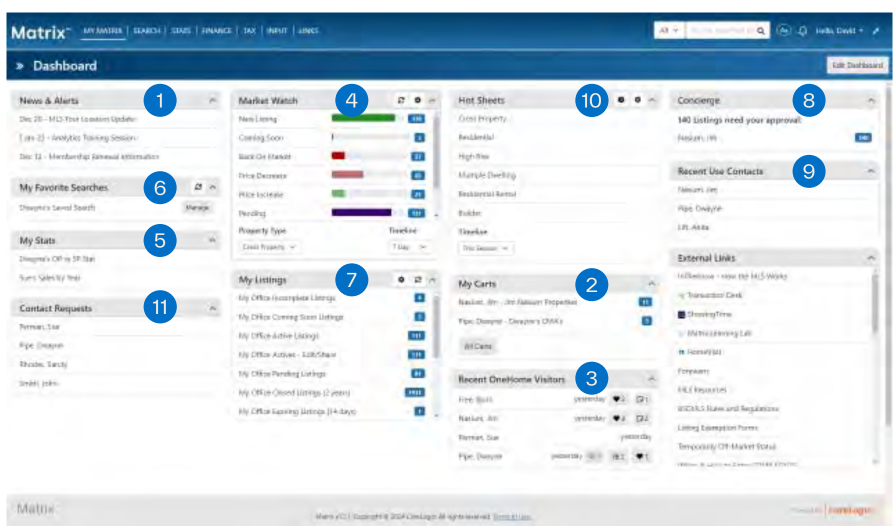




1. **News & Alerts:** Select an item from the list to display the news or alert content in a modal pop-up window.

   NOTE: *the News and Alerts panel will not be visible if there is nothing to display.*

2. **My Carts:** Select a cart link to display all listings currently saved in a recently used Cart.



3 **Recent OneHome™ Visitors:** quickly view a recent OneHome™ visitor's information by selecting their name.

NOTE: *includes only the 10 most recent Portal visitors within the last 30 days.*

NOTE: *the time/date stamp indicates when the contact last visited their Portal.*

NOTE: *hover over an icon for its definition.*

4 **Market Watch:** by default, displays the number of listings that have had status or price activity in the entire system – based on the selected Property Type and Timeframe.

NOTE: *select the "Refresh" icon to update the counts at any time.*

NOTE: *to view activity for your specific Market see "Market Watch (Customize)" in the "My Matrix™" section.*

5 **Stats:** select a link to run your saved preset chart statistic.

NOTE: *for more information, see, "Stats (Save)" in the, "Stats" section.*

6 **My Favorite Searches:** select a link to display the results of your favorite saved search.

NOTE: *manage your favorite search by selecting on the, "Manage" link located to the right of the saved search name.*

NOTE: *a maximum of 10 favorite searches.*

NOTE: *to create a favorite search, see, "New Saved Search" under, "Button Bar" in the "Search" section.*

NOTE: *select, "Update All" to view the number of new listings there are for each Favorite Search since the last time the, "Update All" link was selected.*

7 **My Listings:** select a link to display all your listings (based on status and property type).

NOTE: *each link displays the status, the property type and (in brackets) the current number of listings.*

8 **Concierge:** select a client's name to display all listings waiting on approval before being sent.

NOTE: *each link displays the client's name and (in brackets) the number of listings waiting on approval.*

NOTE: *a, "Concierge Alert" also appears in the Matrix™ header's notification bell.*

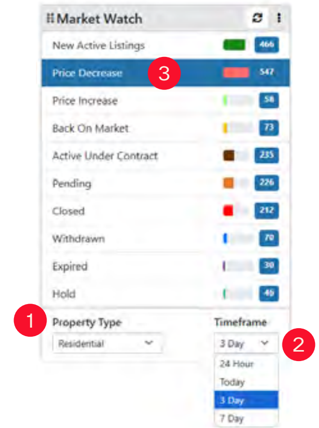
9 **Recent Use Contacts:** select a name to display details of a recently used contact.

10 **Hot Sheets:** select a Property Type to display all listings that have had status or price activity during the specified Timeframe.

NOTE: *to view activity for a specific client's criteria, see "Hot Sheet (Customize)" in the "My Matrix™" section.*

11 **Contact Requests:** select a name to view prospect information sent from your IDX or Agent Website visitor.

Market Watch (Customize)



1. From the Dashboard, select a Property Type on the Market Watch panel.

   NOTE: *results will only include listings that belong to the selected Property Type (i.e. Residential).*

2. Select a Timeframe.

   24 Hour: only activity within the past 24 hours

   Today: only activity since midnight

   3 Day: only activity within the past 3 days

   7 Day: only activity within the past 7 days

   NOTE: *results will only include listing activity within the selected timeframe (i.e. 3 Day).*

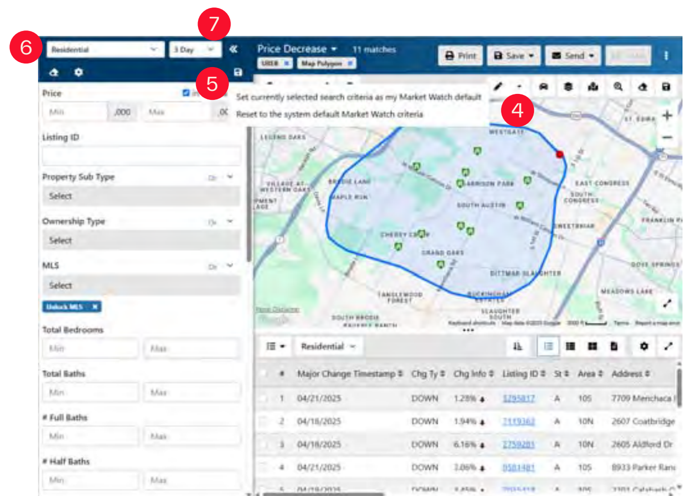
3. Select an activity to display all listings of the selected property type that have experienced that activity within the selected timeframe.

   NOTE: *results will only include listings that have changed with the selected activity (i.e. Price Decrease").*

   NOTE: *select the "Refresh" icon to update the number of listings affected.*

4. Add Criteria to customize and define your specific market.

   NOTE: *see "Criteria" in the "Search" section for more information.*



5. Select the "Save" icon to set the current criteria as the new default for this Market Watch item.

   NOTE: *saving custom criteria, like drawing a map shape to isolate listings in your market, will ensure future Market Watch searches for "Residential Price Decreases" reflect only your selected area.*

   NOTE: *re-select the "Save" icon to access the "Reset to the system default" option.*

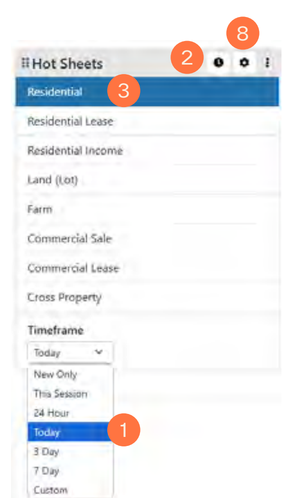
6. Select a Property Type from the dropdown list.

   NOTE: *this feature allows you to change the property type for your selected activity without having to return to the Dashboard.*

7. Select a Timeframe from the dropdown list.

   NOTE: *this feature allows you to change the timeframe for your selected activity without having to return to the Dashboard.*

Hot Sheets (Customize)



1. From the Hot Sheet panel, select a **Timeframe Preset** to display all listings that have had activity within the selected timeframe.

   New Only: new activity that hasn't yet been viewed

   This Session: all activity during the current Matrix™ session

   24 Hours: only activity within the past 24 hours

   Today: only activity since midnight

   3 Day: only activity within the past 3 days

   7 Day: only activity within the past 7 days

   Custom: only activity during a selected timeframe within the past 30 days

   First-Time Run: If you've never run a particular Hot Sheet before, both **"New Only"** and **"This Session"** will default to the last 24 hours.

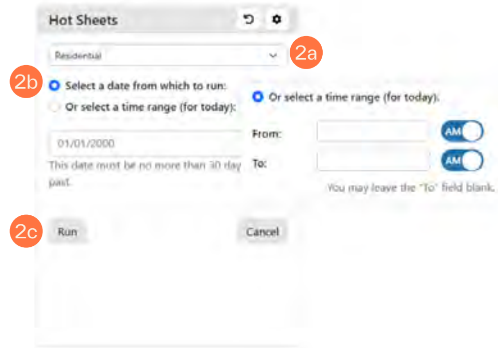
   Previously Run (but not in this session): If you've run this Hot Sheet in the past but haven't used it yet in your current session, **"New Only"** and **"This Session"** will pull data based on the last time you ran it—whether that was days, weeks, or months ago.

Already Run in Current Session: This is the only scenario where **"New Only"** and **"This Session"** behave differently:

- **"New Only"** shows updates since the last time you ran the Hot Sheet within this session.
- **"This Session"** shows the same results as your most recent run in this session. If your ¬earlier run was a first-time run, it may still default to the last 24 hours.

NOTE: from the Search page, select the number of matches to view current Timeframe. 8 matches

2 Select the **Custom Timeframe** icon to display all listings that have had activity within a custom timeframe.



2a **Select a Hot Sheet** to run from the dropdown list.

2b Select a **since date** or a **time range** to search.

NOTE: *date must be within the past 30 days.*

NOTE: *date must be in the mm/dd/yyyy format.*

NOTE: *time range applies to today.*

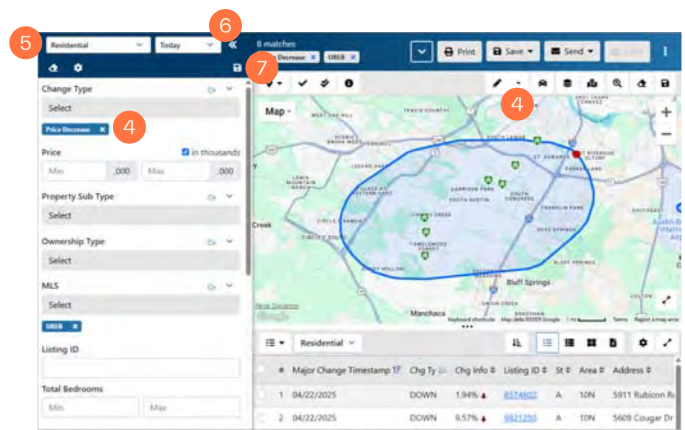
2c Select the "**Run**" button to generate results.

3 **Select a Hot Sheet** to display all listings that have had activity within the selected timeframe.

4 Add **Criteria** to customize your Hot Sheet.

NOTE: *selecting, for example, "Price Decreases" and drawing a map shape, will generate results for listings belonging to the chosen Property Type, that have had a price decrease within the selected area during the selected timeframe.*

NOTE: *see "Criteria" in the "Search" section for more information.*



5 Select the **Property Type** dropdown list to change the property type.

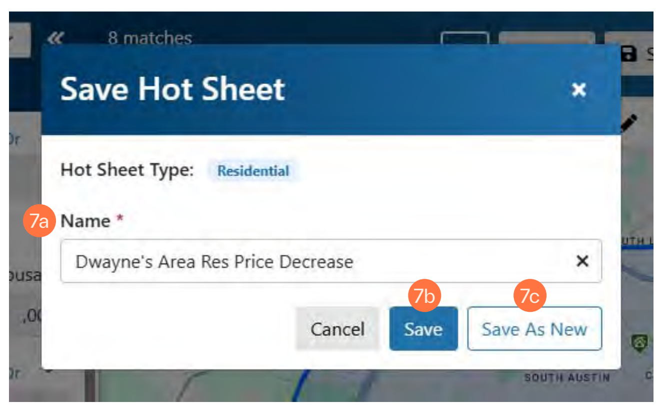
6 Select the **Timeframe Preset** dropdown list to change the timeline.

7 Select the "**Save**" icon to set the current criteria as the new default for this Hot Sheet.

7a Create a **name** to identify this custom Hot Sheet on the Dashboard.

7b Select the "**Save**" button to overwrite the original Hot Sheet's criteria.

7c Select the "**Save As New**" button to keep the original Hot Sheet unchanged and add this new custom Hot Sheet.



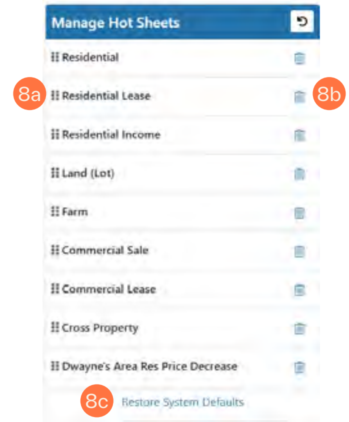
8 Select the **Manage Hot Sheets** icon to manage the Hot Sheet panel.

8a Select a **handle** to reposition a Hot Sheet in the list.

8b Select the **Delete** icon to remove a Hot Sheet from the list.

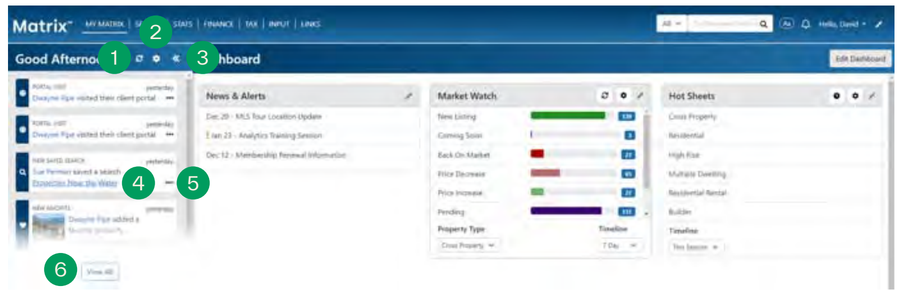
8c Select the "**Restore System Defaults**" link to reset the Hot Sheet panel to the system defaults.

NOTE: *see "Hot Sheets" in the "Settings" section for more information.*



Timeline

The Dashboard's portal Timeline displays your client's recent activity in their portal.



1 **Refresh:** refreshes the timeline to display the most recent portal activity.

2 **Settings:** select to display which portal actions you'd like to view in the timeline.

3 **Close:** close the timeline.

4 **Link:** select a link to view additional information.

5 **Ellipses:** select the ellipses to expand the associated timeline item.

6 Select the "View All" button to view a dedicated Timeline page.

6a **Date:** select the activity timeframe.

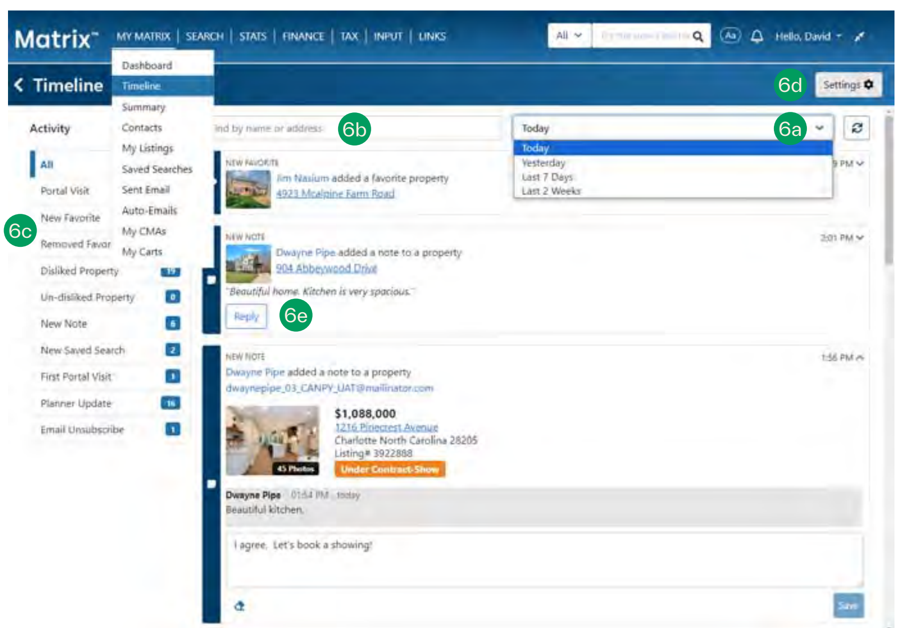
6b **Name/Address:** filter activity by client's name or property address.

6c **Type:** select the type of activity that you'd like to view.

6d **Settings:** select to display which portal actions you'd like to view in the timeline.

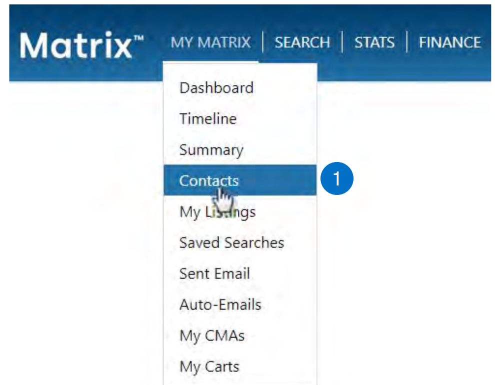
6e **Notes:** reply to a client's listing note directly from Timeline.

NOTE: *the Timeline page can also be accessed directly via My Matrix™ > Timeline.*



Contacts

1 From the Matrix™ navigation menu, hover, “My Matrix™” and select, “Contacts”.



1a **Import:** select the arrow to upload a .csv file containing the contacts you would like to import into Matrix™.

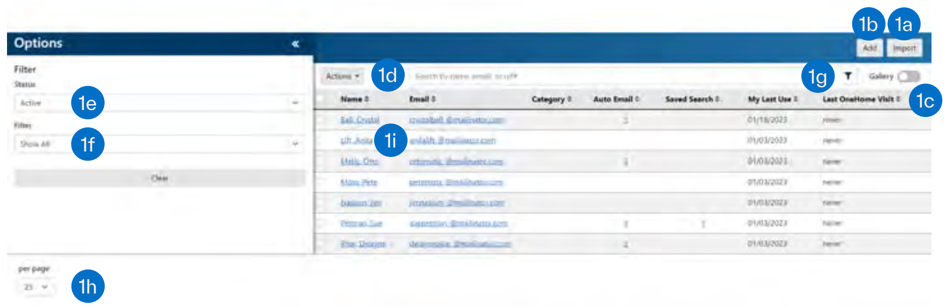
1b **Add:** select the, “**Add**” button to add a new contact.

NOTE: *for more information see, “Contacts (Add)” in the, “My Matrix™” section.*

1c **View:** toggle between a list-view (default) and a gallery-view to see your contact’s core information and activity at a glance.

NOTE: *while in gallery-view mode, hover any contact’s details to view its tooltip definition.*

1d **Actions:** select this option to perform any of the following actions on selected contact(s):



Export: download the selected contact(s) as a .csv file

Set Active: set the selected inactive contact(‘s) status to, “Active”

Set Inactive: set the selected active contact(‘s) status to, “Inactive”

Delete: permanently remove the selected contact(s) and all their associated data

1e **Status:** select the, “**Status**” dropdown list to only view contacts based on the selected status.

Active: view active contacts only

Inactive: view inactive contacts only

All: view all active and inactive contacts

1f **Filter:** select the, “**Filter**” dropdown list to only view contacts that fulfill any of the following criteria:

with active auto emails

with inactive auto emails

with no auto emails

who have visited OneHome

who have not visited OneHome

I haven’t worked with

who have saved searches

who have no saved searches

in this category: *based on contacts you added to a specific group*

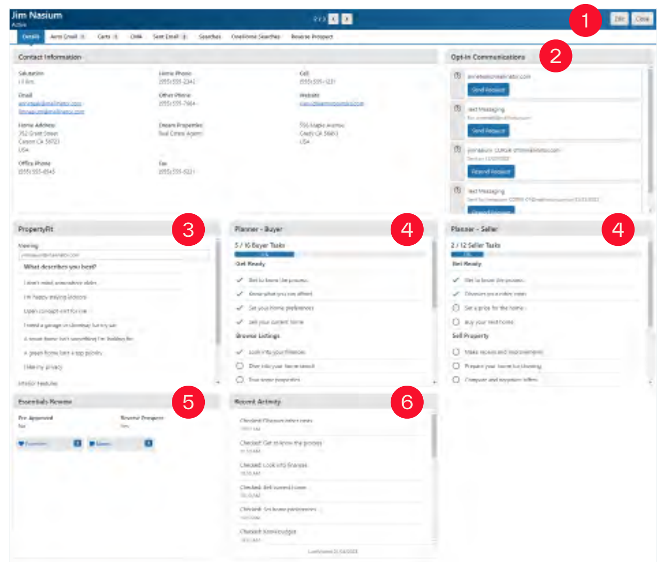
1g **Text Filter:** filter a specific contact by entering their full—or partial—name, email address or reference number (Ref#).

1h **Results per page:** update how many contacts display on each page.

1i **Contact Name:** select a contact’s name to view, or edit, information about that contact.

NOTE: *for more information see, “Contacts (Manage)” in the, “My Matrix™” section.*

Contacts Dashboard



1 **Edit:** update this contact's details.

NOTE: *for more information see, "Contacts (Add)" in the, "My Matrix™" section.*

2 **Opt-In Communications:** select the, "Send Request" button to send your contact—or, their group member—an opt-in request.

NOTE: *contacts who have already opted-in to receive a SMS Text will display a checkmark beside their phone number in the Contact Information area.*

3 **PropertyFit:** a property score is determined based on these responses provided by your contact in their OneHome™ PropertyFit tool.

NOTE: *while viewing search results for this contact, a unique, "Fit Score" will appear as an additional field associated with each listing – indicating how much of a match the property is for the contact. Contacts containing multiple email addresses (i.e. husband and wife) may display a unique Fit Score for each address.*

NOTE: *for more information see, "View As" under, "Refine" in the, "Button Bar" section.*

4 **Planner:** your contact can select, from OneHome, which buying or selling options that they would like to become more familiar with.

Your Planner section, in Matrix™, provides you with an at-a-glance view of exactly where your contact currently is in their review process.

5 **Essentials Review:** review important contact details such as:

5a if they are pre-approved for a mortgage.

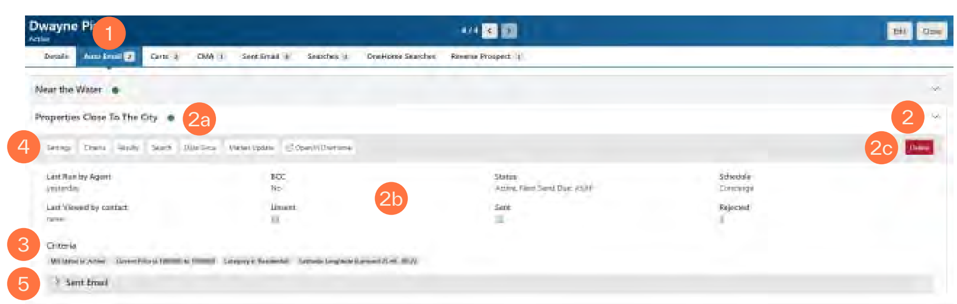
5b if they are visible as a reverse prospect.

5c Properties that they've favorited or discarded.

6 **Recent Activity:** view a timeline of this contact's most recent OneHome™ activity.

NOTE: *select an, "Activity" link to view the contact's associated action.*

Contacts > Auto Email



1 From a specific contact's page, select the, "Auto Email" tab.

2 **Subject Line:** select the Auto Email's subject line to expand the details section.

2a **Status:** view the current status of this Auto Email.

2b **Information:** view relevant information pertaining to this Auto Email.

2c **Delete:** select the, "Delete" button to permanently delete this Auto Email.

3 **Criteria:** view the criteria used in this Auto Email.

4 Select an action for this Auto Email.

Settings: enable/disable this Auto Email or modify the default settings.

Criteria: modify this Auto Email's search criteria.

Results: display the results of this Auto Email's search criteria.

Date Since: display the results since the last time the, "Date Since" button was selected.

Market Update: display the results since the last time the search was run or between the specified date range.

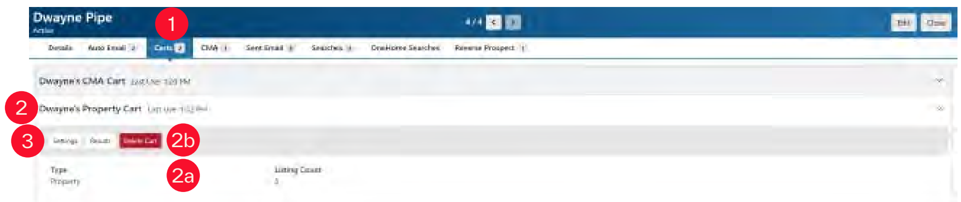
Open In OneHome: view these results within your client's portal.

5 **Sent Email:** view a collection of recent Auto Emails sent to this contact.

Contacts > Carts

1 From a specific contact's page, select the, "Carts" tab.

2 **Cart Name:** select the Cart's name to expand the details section.



2a **Information:** view relevant information pertaining to this Cart.

2b **Delete:** select the, "Delete" button to permanently delete this Cart.

3 Select an action for this Cart.

Settings: update this cart's name.

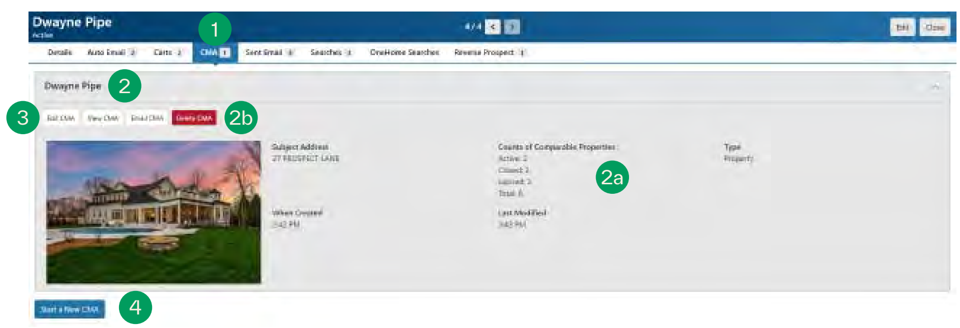
Results: display the properties in this cart.

Contacts > CMA

1 From a specific contact's page, select the, "CMA" tab.

2 **CMA Name:** select the CMA's name to expand the details section.

2a **Information:** view relevant information pertaining to this CMA.



2b **Delete:** select the, "Delete" button to permanently delete this CMA.

Edit CMA: access the CMA Wizard for this CMA.

3 Select an action for this CMA.

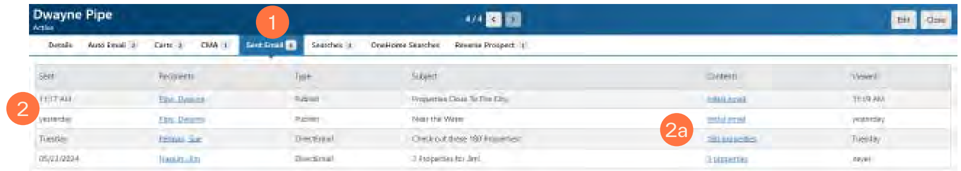
Edit CMA: modify this CMA in the CMA Wizard.

View CMA: generate a .pdf of this CMA.

Email CMA: send a link to this CMA, via email, to one or more contacts.

4 Select the "**Start a New CMA**" button to create a brand-new CMA.

Contacts > Sent Email



1. From a specific contact's page, select the, "Sent Email" tab.
2. **Sent Emails:** view emails sent, from Matrix™, to this contact.
   - 2a **Contents:** select a link to view the content sent in the associated email.

Contacts > Searches

1. From a specific contact's page, select the, "**Searches**" tab.
2. Select the **Search Name** to expand the details section.
3. Select an **action** for this Saved Search.

Settings: rename this saved search, assign it to a different contact or include it as one of your 10 favorites that appear in the "My Favorite Searches" panel on the Dashboard.

Criteria: modify this Saved Search's criteria.

Results: display the results of this Saved Search's criteria.

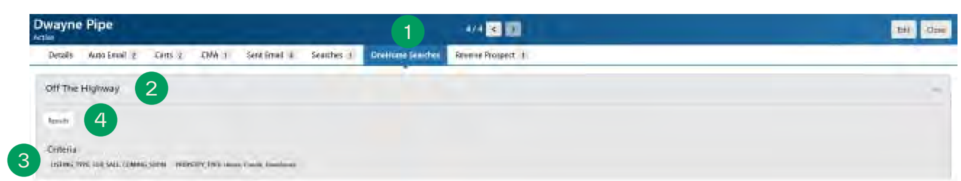
Date Since: display the results since the last time the "Date Since" button was selected.

Market Update: display the results since the last time the Saved Search was run or between the specified date range.

4. Select the "**Delete**" button to permanently delete this Saved Search.
5. View the **criteria** used in this Saved Search.

Contacts > OneHome Searches

This tab contains custom searches that your client has created — and, saved — in their OneHome portal.



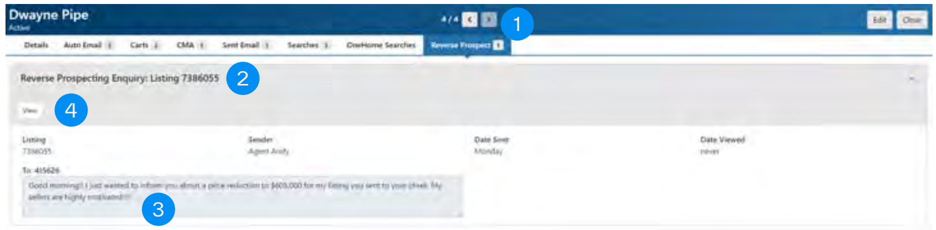
1. From a specific contact's page, select the, "**OneHome Searches**" tab.
2. Select the **Search Name** to expand the details section.
3. View the "**Criteria**" that your client used in this search.
4. Select the "**Results**" button to run this search in Matrix™.

Contacts > Reverse Prospect

If this contact appears in a listing agent's Reverse Prospect results, the listing agent may send you a message if their listing matches this client's search criteria.

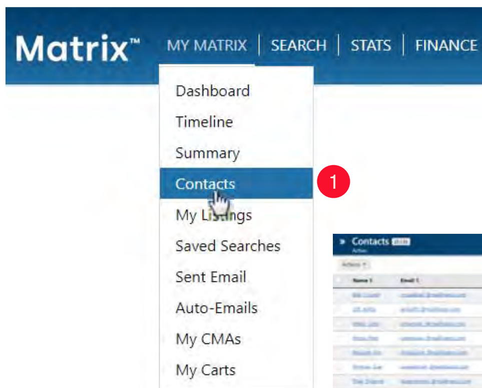
The Reverse Prospect tab includes a copy of messages sent.

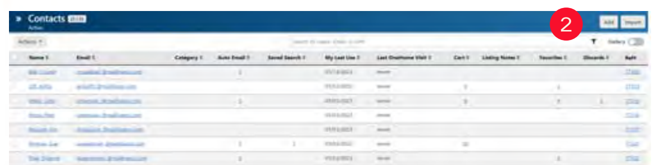
1. From a specific contact's page, select the, "**Reverse Prospect**" tab.
2. Select a **Reverse Prospect Enquiry** to expand the details section.
3. View the **message** that was sent.
4. Select the "**View**" button to view details about the listing and the client's search criteria.



Contacts (Add)

1. From the Matrix™ navigation menu, hover the, "**My Matrix™**" tab and select, "**Contacts**".
2. Select the, "**Add**" Button.
3. From the, "**Add Contact**" page, fill out all mandatory fields (highlighted background) plus any optional fields (no highlighted background).

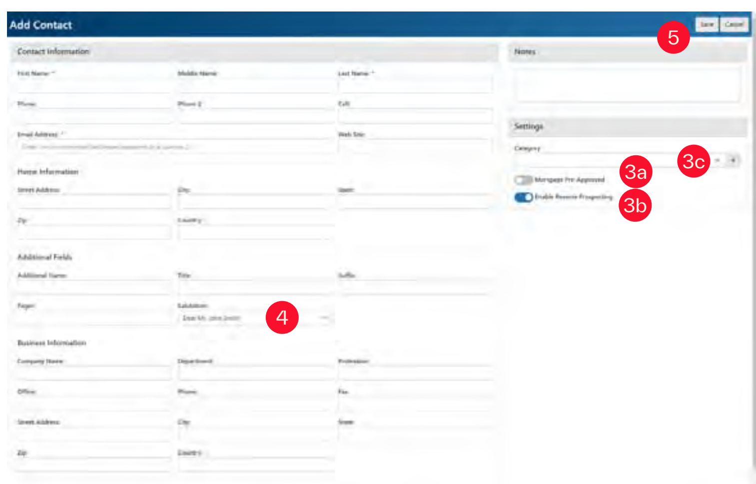




- **3a** Select the, "**Mortgage Pre-Approval**" checkbox if this contact has been pre-approved (this will be indicated in the listing agent's reverse prospecting section).
- **3b** Select the, "**Enable Reverse Prospecting**" checkbox to show the listing agent that their listing has been sent to this contact.

  NOTE: *listing agent will only see your contact's associated, "Ref#" to identify them.*

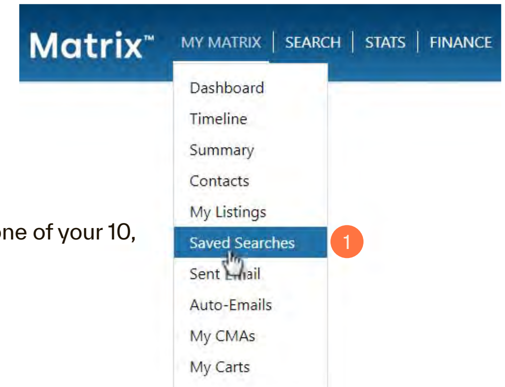
  NOTE: *for more information, see, "Reverse Prospect" under, "My Listings" in the, "My Matrix™" section.*



- **3c** Select a **category** if you would like to organize this contact within a specific group.

4. Select a, "**Salutation**" to include on outgoing messages sent, from Matrix™, to this contact.
5. Select, "**Save**".

Saved Searches



1. From the Matrix™ navigation menu, hover, "**My Matrix™**" and select, "**Saved Searches**".
2. Select a Saved Search to **manage.**

   Settings: rename this saved search, assign it to a different contact or include it as one of your 10, "My Favorite Searches" in the Dashboard panel.

   Criteria: modify this Saved Searches criteria.

   Results: display the results of this Saved Searches criteria.

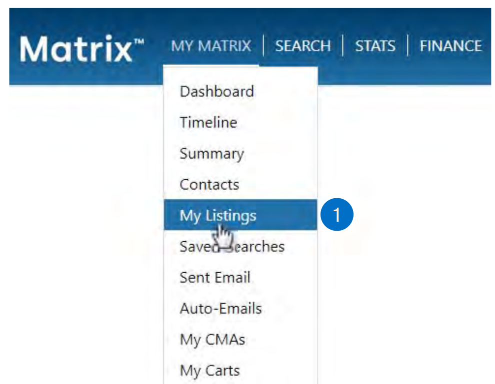
   Search: view criteria and results within the search page.

   Date Since: display the results since the last time the "Date Since" button was selected.

   Market Update: display the results since the last time the Saved Search was run or between the specified date range.

   Delete: permanently delete this Saved Search.

My Listings



1. From the Matrix™ navigation menu, hover the, "**My Matrix™**" tab and select, "**My Listings**".
2. Select the, "**Show**" dropdown list to show different results—such as listing Hit Counters.

   NOTE: *all columns are re-calculated nightly.*

   2a **Client Data**

   Client Portals: the number of portals your listing has reached by Direct or Auto Email.

   Client Views: total number of Full Display views by Clients in their portal.

   Client Favorites: number of Clients presently marking this listing as a favorite in their portal.

   Client Possibilities: number of Clients presently marking this listing as a possibility in their portal.

   Agent Data

   Auto Emails: number of Auto Email searches presently matching listing.

   Prev 14 Day Views: number of times this listing has been viewed in the past 14 days.

   Agent Published: in Concierge mode, the number of Auto Emails that found this listing and was approved/sent by agent.

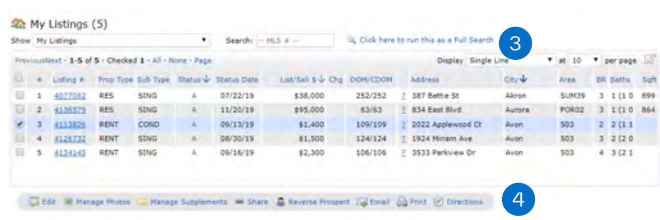
   Agent Rejected: in Concierge mode, the number of Auto Emails that found this listing but was rejected/not sent by agent.

   Agent IDX Views: number of times this listing has been publically viewed from the IDX on Agent's Website.

   Agent Views: number of times this listing has been viewed, by an Agent, from within Matrix™. This increases every time an Agent views the Full display for that listing.

3. Select the, "Select here to run this as a Full Search" link to display your listings as search results.

   NOTE: *running your listings as a search allows for additional functionality. See, "Search Results" in the, "Search" section for more information.*



4 Select a listing and use the **Button Bar** to perform a task.

Edit: edit the selected listing (see, “Listing (Edit Existing)” in the, “Input” section for more information).

Manage Photos: add, remove or reorder listing photos (see, “Photos and Supplements (Add New)” in the, “Input” section for more information).

Manage Supplements: add, remove or re-order listing supplements (see, “Photos and Supplements (Add New)” in the, “Input” section for more information).

Share: copy the URL to display the selected listing, for example, on a webpage or, perhaps, your favorite social media site.

Reverse Prospect: view agents with clients who have been sent Direct, or Auto, Emails that include your selected listing.

- **Agent Name:** sends the buying agent an email directly from Matrix™.
- **Ref #:** a reference number that identifies the client who was sent this listing. The buying agent can then identify the client, using this reference number, under, “My Matrix™ > Contacts”.
- **Pre-approved:** displays a checkmark if the client has a pre-approved mortgage (to set a contact as pre-approved, see “Contacts (Add)” in the “My Matrix™” section).
- **Count:** indicates the number of listings returned in a search that match the client’s criteria.
- **Email address:** sends the buying agent an email from your default mail application.
- **Date Sent:** indicates when the client was notified of the listing.
- **Heart Icon:** identifies properties that have been favorited by the client.

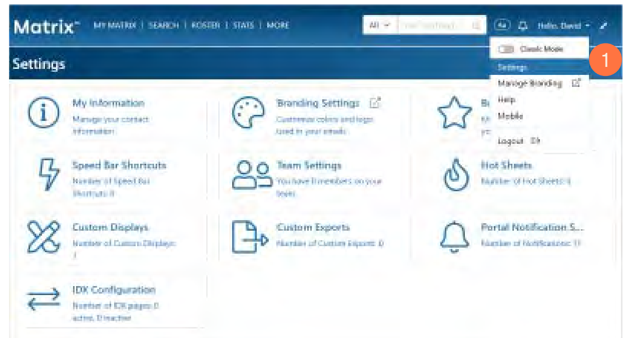
Email: email the selected properties.

Print: print, or create a .pdf of, the selected properties.

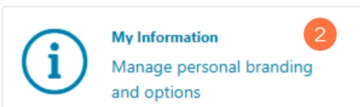
Directions: create custom, turn-by-turn driving directions using the selected properties.

Settings

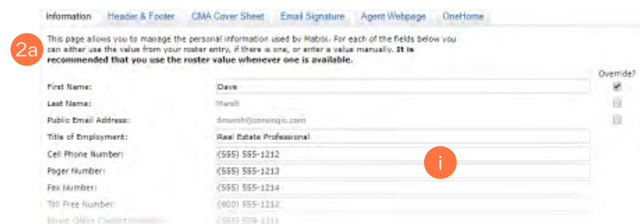
My Information



1. From the Matrix™ top menu, select your name then select, "**Settings**".
2. Select the, "My Information" link to add/update your contact information displayed from various sources.



Information



2a **Information:** contains your source contact information that is shared with Customers and Prospects via the Header & Footer, CMA Cover Sheet and OneHome.

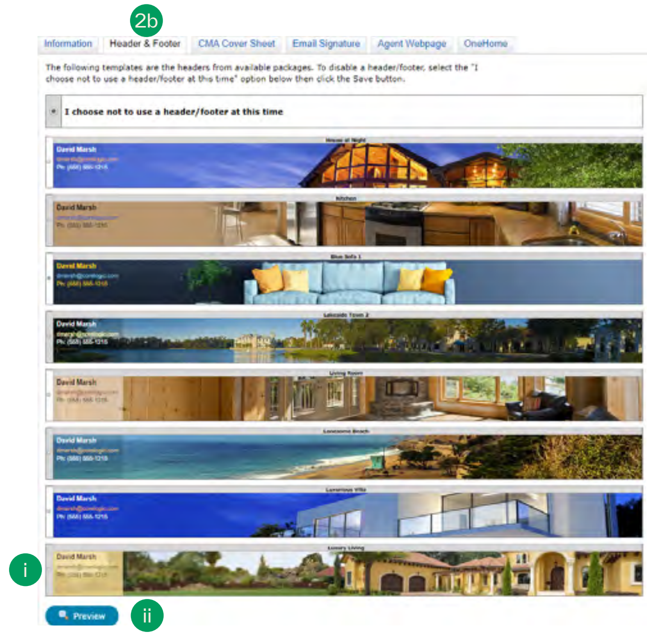
i Add, update then review your information to ensure that it's correct.

NOTE: *the default information in this section has been pulled from your Board or Association. Though some fields here may be locked, textboxes with a checkmark indicate that you may edit the associated field. If, however, any of the default information on this page is incorrect, please contact your Board or Association to have it updated at its source.*

ii Select the, "**Save**" button to save any changes.

Header & Footer

2b **Header & Footer:** a collection of branded banners for use in printed reports, CMA's and the Agent Webpage.



i Choose an **Agent banner** to brand the information shared with your Customers and Prospects.

NOTE: *select the, "I choose not to use a header/footer at this time" option to disable the templates and only brand using your default contact information.*

: *Alternatively, you can select the, "Basic Template" option to display specific contact information as well as set a unique color theme (see, "Customize Header" in the, "Portal Set-Up" section of this Guide).*

ii Select the, "**Preview**" button.

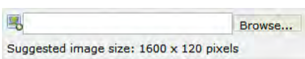
Customize Header

iii From the, "**Header & Footer**" section, review your banner's Header image.

Select a different banner image/theme: return to the banner section and choose a new theme

Upload a custom banner image: replace the default banner image with a custom image from your computer's hard drive.

NOTE: *suggested image dimensions are 1600 (width) x 120 pixels (height). Smaller images will scale-to-fit in height.*



iv Choose an **Agent Photo.**

No Photo: hide your agent photo.

Use Custom Photo: add/update a photo to use in your Agent banner.

v Select the information fields you'd like to use to **brand** your Agent banner.

NOTE: *branding fields are pulled from the, "My Information" tab (see, "My Information" in the, "Settings" section).*

vi Choose a **color theme.**

Branding background color: the background color behind your agent information.

Transparency Level: sets the opacity of the branding background color which determines how much of the banner is visible beneath the agent information.

Branding text color: your banner's agent information text color.

Branding link color: your banner's agent information link color.

Banner background color: header color displayed behind the banner.

Customize Print Footer

vii From the, “Header & Footer” section, select the, “Yes, I want a **Print Footer**” option.

NOTE: *select the, “No Print Footer for me” option if you prefer printed material not include a footer.*

viii Select the information fields to **brand** your Agent Footer.

NOTE: *branding fields are pulled from the, “Information” tab (see, “Information” in the, “Portal Set-Up” section of this Guide).*

ix Choose a **color theme.**

Footer Text color: your agent information text color.

Footer Line color: the line color of the line above your agent information.

x Select an **action.**

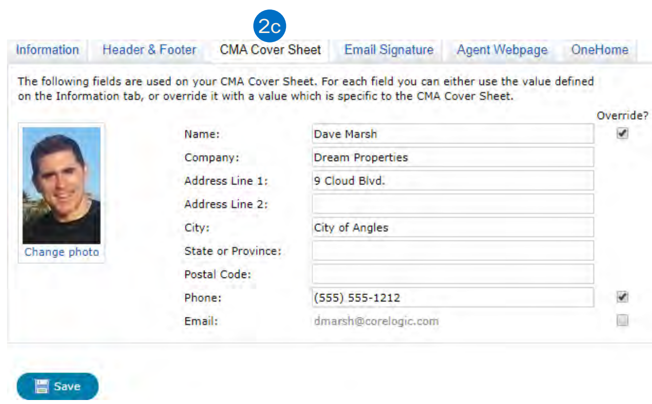
Reset Branding to defaults: restores branding defaults.

Save: saves any changes to your header and footer.

NOTE: *select the, “Reset Branding to defaults” to restore your defaults.*

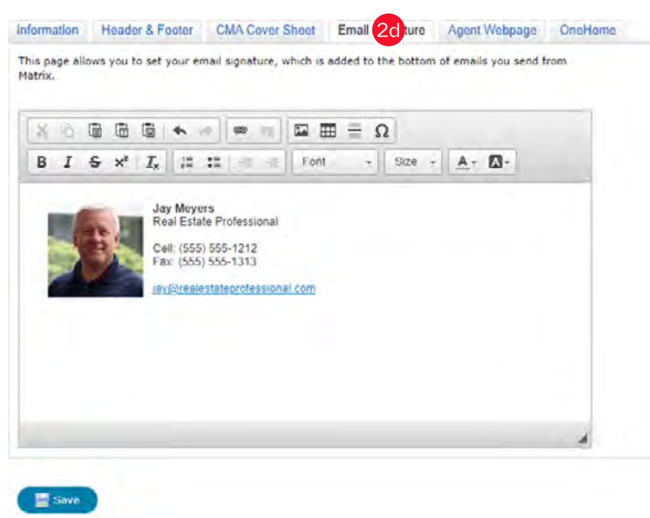
CMA Cover Sheet

2c **CMA Cover Sheet:** manage how you would like your contact information to appear on a CMA cover page. Select on the, “Override” checkbox to override any associated pre-populated infomration then select, “Save”.



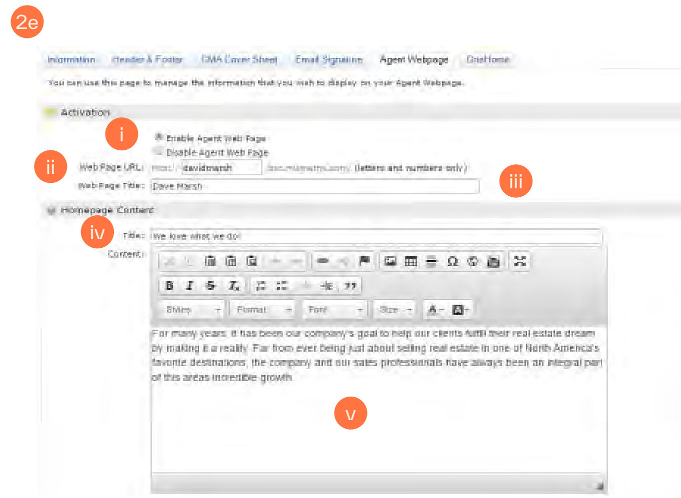
Email Signature

2d **Email Signature:** add your photo, text as well as any links then select the, “Save” button to include this signature on all outgoing messages sent by you, or on your behalf, from Matrix™.



Agent Webpage

2e **Agent Webpage:** your own professional webpage that's integrated with IDX search functionality and hosted on the Matrix™ web server.



Activation

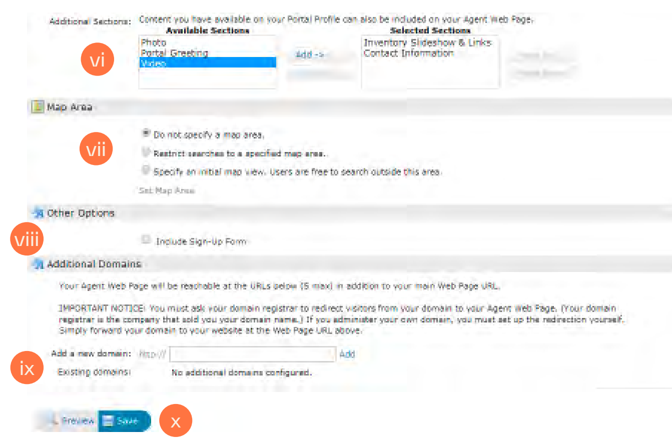
i Select the, "**Enable Agent Web Page**" radio button to activate your webpage and allow visitor access. Select the, "**Disable Agent Web Page**" option to prevent visitors from accessing your site.

ii The, "**Web Page URL**" is the address where visitors will find your site. You may update your name in the textbox provided (alpha numeric characters only. No spaces.).

NOTE: *this is the URL that you will share with others (if you prefer to use your own domain name, see, "Additional Domains" below).*

iii Add a, "**Web Page Title**" that will appear in the browser's tab.

Homepage Content



iv Add a, "**Title**" that will appear above the content on your website's "Welcome Page".

v Select inside this area and use the associated, "Rich Text Box" buttons to add, "**Content**" to your webpage.

vi Select which profile information you would like to include from the, "Portal Profile" section.

NOTE: *for more information, see "Portal Profile" under, "My Information" in the, "Settings" section.*

Map Area

vii Configure how the map should be used on your website.

NOTE: *for more information see, "Map Area" under, "Settings>IDX Configuration" in the, "My Matrix™" section.*

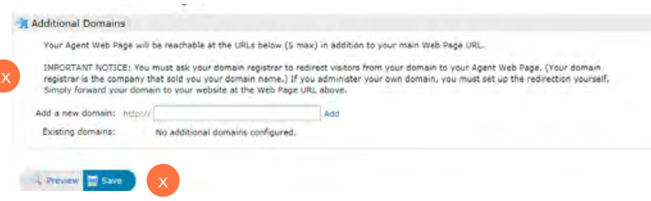
Other Options

viii Select this checkbox if you would like to include a Sign-Up form for your website visitors then add an optional, "Sign-Up Message" (welcome or, perhaps, informational).

NOTE: *visitors who submit this form will appear in the, "Contact Requests" Panel on the Matrix™ Homepage (see, "Contact Requests" under "Home Panels" in the, "My Matrix™" section).*

Additional Domains

ix If you currently own a domain name and you would like to use it to replace the default, “Web Page URL” (see above) in the Address bar, simply add your domain in the textbox provided then select the, “Add” link.



NOTE: *you must ask your domain registrar to redirect visitors from your domain to your Agent Web Page (your domain registrar is the company that sold you your domain name). If you administer your own domain, you must set up the redirection yourself. Simply forward your domain to your website at the, “Web Page URL” (see above).*

Save

x Select, “Save” on the Button Bar to save your work and, if enabled, activate your website.

NOTE: *preview your site before going live by selecting the, “Preview” button.*

NOTE: *view your live site by selecting the, “View Site” link that will temporarily appear below the Matrix™ menu.*

Your changes have been saved. ✕

OneHome™

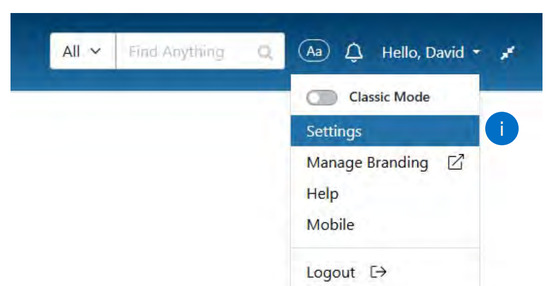
2f **OneHome™:** manage how you would like your contact information to appear to your clients within OneHome.

Broker/Agent Choice

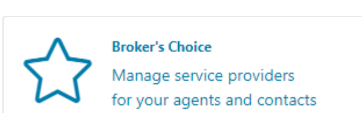
3 Select the, “**Broker Choice**” or “**Agent Choice**” link to add your recommended service providers to OneHome™ Marketplace.

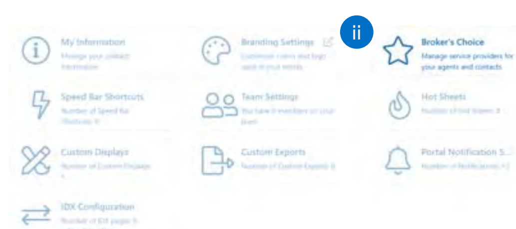
3a Add a Broker Level Service Provider

i From the Utility Menu, select, “**Settings**”.



ii From the, “Settings” section, select, “**Broker’s Choice**”.



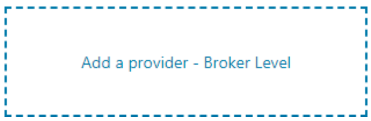


iii Select the, “**Opt-Out**” link to disable the associated broker-recommended service for brokers and all agents of your brokerage.

NOTE: *at any time, a broker can also choose to opt back into a service provider vertical.*

iv Select a Broker-Level Service Provider to **add**.

Add a provider – Broker Level: displays prominently at the top of the Service Provider results in OneHome™ and is visible to clients belonging to all agents in your brokerage.



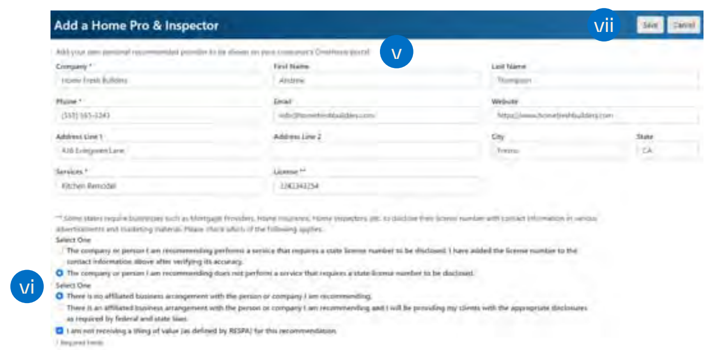
NOTE: *by choosing not to opt-in to a service, agents will not have the option of adding their recommended provider(s) and will be prompted to contact their broker (see, “Add a Service Provider” for additional information).*

v Enter the service provider’s **contact information.**

NOTE: *mandatory field are indicated with a highlighted background.*

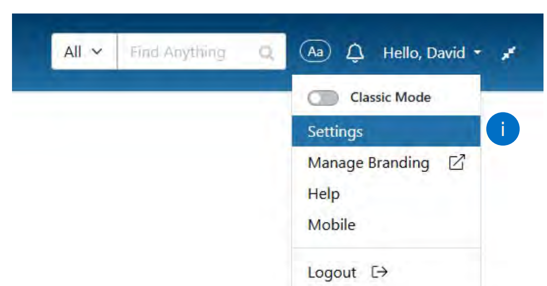
vi Select which **Disclaimer options** apply.

vii Select, “**Save**”.

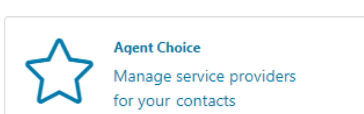


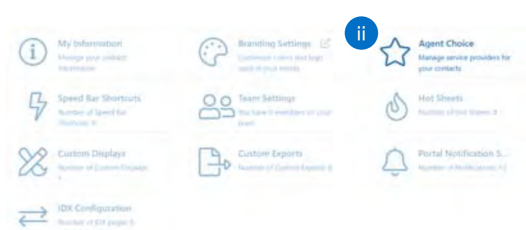
3b Add a Service Provider (Agent Level)

i From the Utility Menu, select, “**Settings**”.



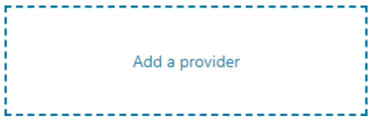
ii From the, “Settings” section, select, “**Agent Choice**”.





iii Select a provider to **add.**

Add a provider: displays directly below the Broker-level recommendation in OneHome™ and is visible to your clients only.

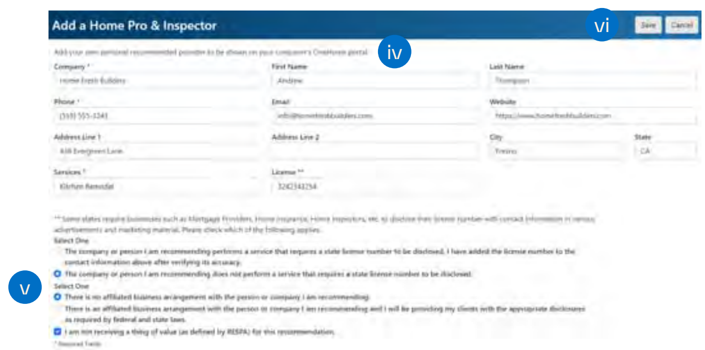


iv Enter the service provider's **contact information.**

NOTE: *mandatory field are indicated with a highlighted background.*

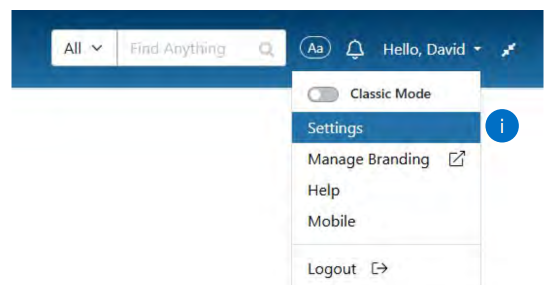
v Select which **Disclaimer options** apply.

vi Select, "**Save**".



3c Edit or Delete a Service Provider

i From the Utility Menu, select, "**Settings**".

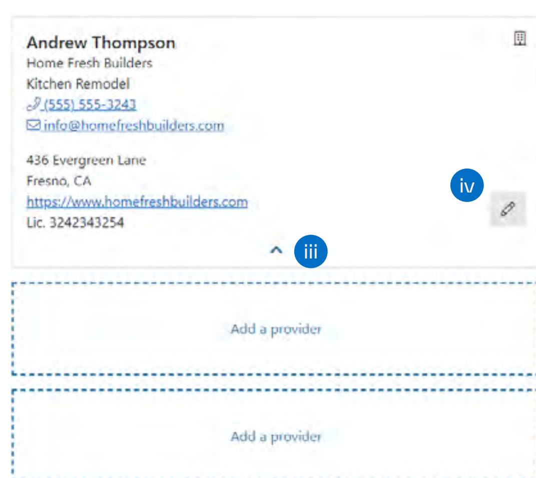


ii From the, "Settings" section, select either, "**Broker's Choice**" or, "**Agent Choice**".

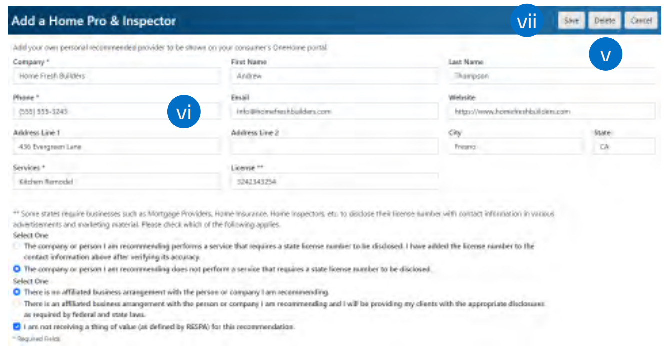
iii Toggle the **arrow** to hide/show the edit icon.

NOTE: *Agents do not have the ability to edit a broker's service provider recommendation.*

iv Select the, "**Edit**" icon.



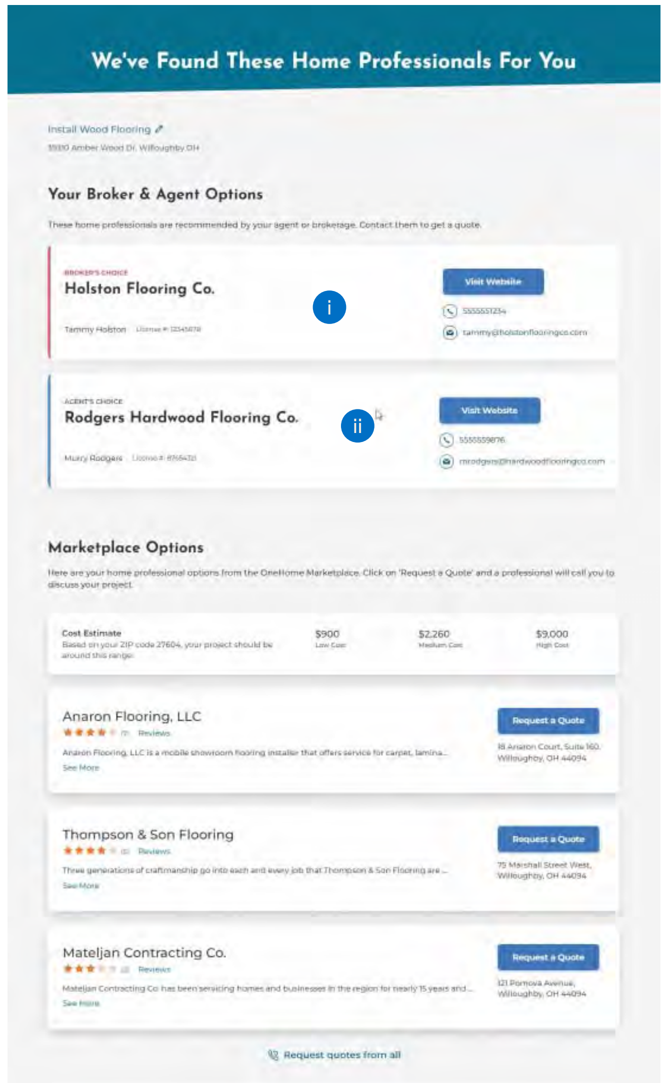
- **v** Select the, “**Delete**” icon to delete the selected service provider recommendation.
- **vi** **Modify** your content.
- **vii** Select the, “**Save**” button to save your updates.



3d Client View in OneHome™

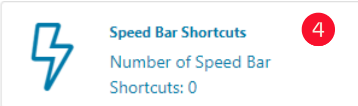
From OneHome™, clients are able to view Broker and Agent Recommendations when they generate a search for either insurance providers, mortgage specialists or home professionals and inspectors.

- **i** **Broker’s Choice:** the broker-recommended provider displays prominently at the top of the Service Provider results.
- **ii** **Agent’s Choice:** displays directly below the Broker-level recommendation.



Speed Bar Shortcuts

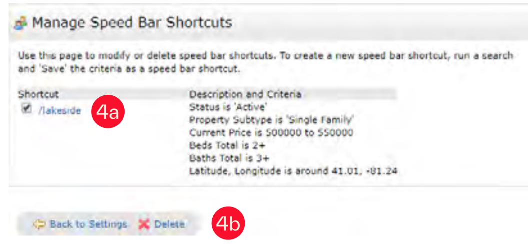
4 Select the, “ **Speed Bar Shortcuts**” link to manage existing Speed Bar shortcuts.



4a Select the custom link to **modify** the criteria used with this shortcut.

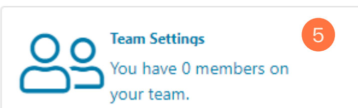
4b Select the, “**Delete**” button to remove this shortcut.

NOTE: *for more information, see, “Speed Bar Shortcut (Create)” in the, “Search” section.*



Team Settings

5 Select the, “**Team Settings**” link to manage permissions for team members to create new listings, send CMA’s, Reports and email under your identity or on your behalf.

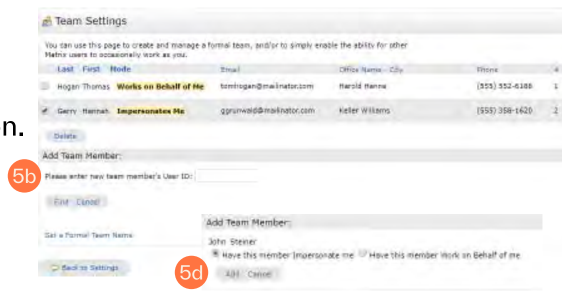


5a Select the, “Select here to create a team.” link.

5b Enter the team member’s **ID** then select the, “**Find**” button.

5c Choose if this team member should **impersonate** you when communicating with your contacts or if emails should be sent by them but **on behalf of** you.

5d Select the, “**Add**” button.

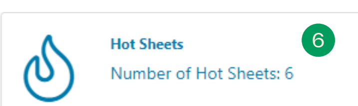


NOTE: *select the, “Set a Formal Team Name” link to customize your team name (optional).*

NOTE: to access your team leader’s system, select your name in the Matrix™ top menu, then select your team leader.

Hot Sheets

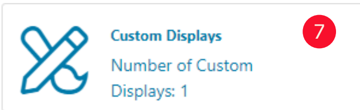
6 Select the, “**Hot Sheets**” link to manage your Hot Sheets.



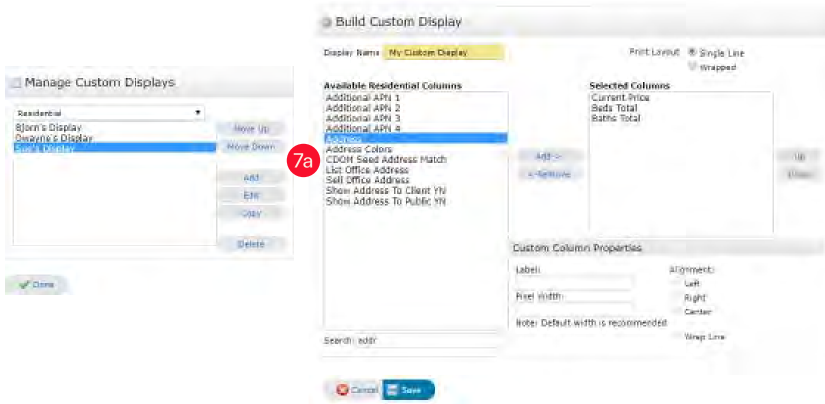
NOTE: *for more information, see “Hot Sheets (Customize)” in the “My Matrix™” section.*

Custom Displays

7 Select the, “**Custom Displays**” link to manage custom displays created for use in the Single Line Grid Display.



7a Select an **action.**



Property Type Dropdown: view displays in - or add a custom display to - the selected property type.

Move Up: moves the selected display closer to the top of the list.

Move Down: moves the selected display closer to the bottom of the list.

Add: selects fields used in the new custom display.

Edit: manages the fields used in the selected display.

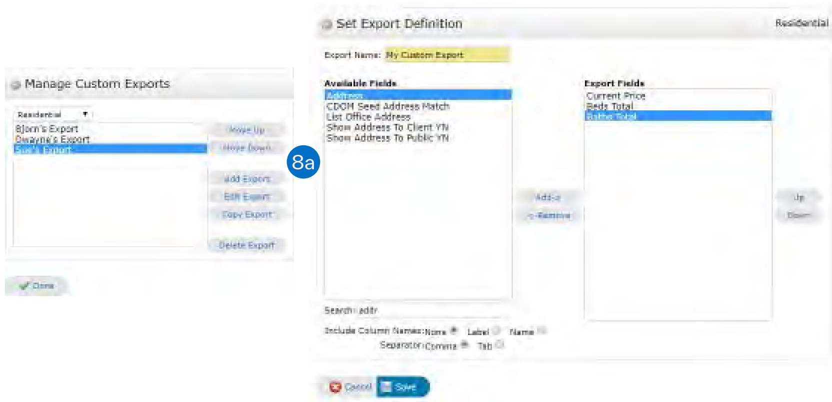
Copy: creates a copy of the selected display.

NOTE: *view your custom display by selecting it from the, “Display” dropdown list on the, “Results” tab (see, “Search Results” in the, “Search” section).*

Custom Exports

8 Select the, "**Custom Exports**" link to manage specific fields used to export data to a .csv file.

8a Select an **action**.



Property Type Dropdown: view exports in - or add a custom export to - the selected property type.

Move Up: moves the selected export closer to the top of the list.

Move Down: moves the selected export closer to the bottom of the list.

Add Export: selects fields used in the new custom export.

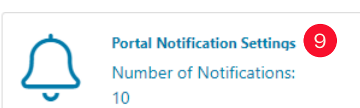
Edit: manages the fields used in the selected export.

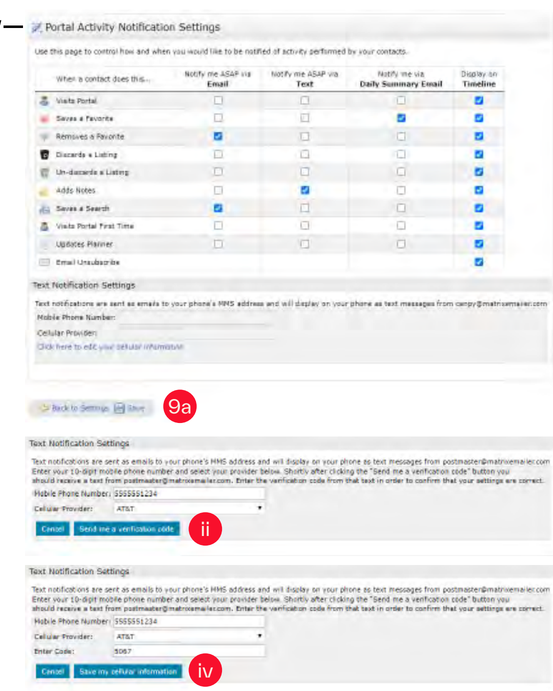
Copy: creates a copy of the selected export.

NOTE: *generate your custom export by selecting the properties in your search results then, from the Button Bar, select, "Export" (for more information, see, "Export" under, "Actions" in the, "Button Bar" section).*

Portal Notification Settings

9 Select the, "**Portal Notification Settings**" link to manage how—and when—you would like to receive OneHome™ notifications.





When a contact does this: the specific action taken by a client in OneHome.

Notify me ASAP via Email: alerts you, by email, when a selected action is taken by a client.

Notify me ASAP via Text: alerts you, by text, when a selected action is taken by a client.

i Select the, "**Select here to edit your cellular information**" link to add/edit your phone number and to select your cellular provider.

ii Once your phone details have been entered, select the, “**Send me a verification code**” button.

NOTE: *some mobile carriers may send you an initial text requiring you to first confirm that you would like to accept, “Email to SMS” messages.*

iii Check your mobile device then, back in Matrix™, enter the **verification code** that was received.

iv Select the, “**Save my cellular information**” button.

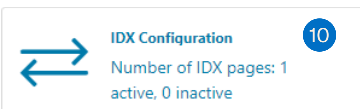
Notify me via Daily Summary Email: alerts you, by email, a daily summary of the selected action.

Display on Timeline: selected actions will appear in the Dashboard’s Timeline for recent portal activity (NOTE: for more information, see “**Timeline**” in the “My Matrix™” section).

9a Select, “**Save**”.

IDX Configuration

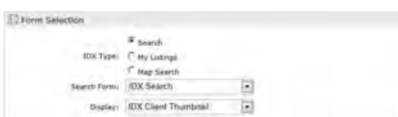
10 Select the, “**IDX Configuration**” (Internet Data Exchange) link to manage how property searches should appear within an existing webpage.



10a From the **IDX Configuration** section, either select the name of an existing IDX page to manage or select, “Create a new IDX page” then add a unique name for the one you would like to create.

10b **Form Selection:** choose one of the following IDX forms to include on your website.

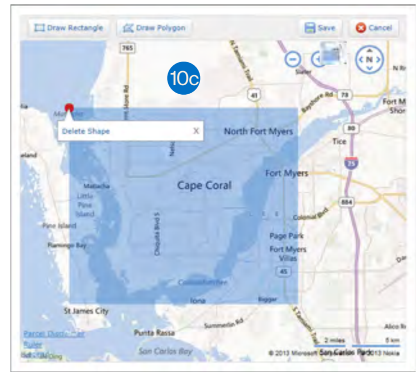
Search: select the, “Search” option then, from the, “Search Form” dropdown list, choose which Search Criteria form to display on your webpage. If available, select how you would like your results displayed by choosing from the, “Display” dropdown list.



My Listings: select the, “My Listings” option then, from the, “My Listings Query” dropdown list, which listings to display on your webpage.

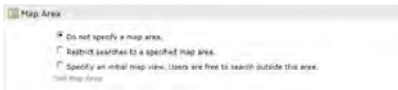
Map Search: select the, “Map Search” option then, from the, “Search Form” dropdown list, which Search Criteria form to display with the map.

10c Map Area: when including a Map Search IDX on your webpage, specify if you would like to set any search area restrictions or an initial map view.

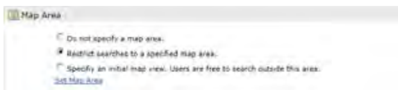


NOTE: *the, "Map Area" section will appear only when the, "Map Search" option (in the, "Form Selection" section) is selected.*

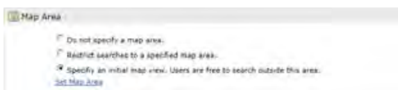
Do not specify a map area: select this option to remove any restrictions placed on where a user may search on the map.



Restrict searches to a specific map area: select this option to restrict users from searching outside the map area that you specify. Select the, "Set Map Area" link to open the map then, from the map, select a shape tool to select an area. Delete the area by hovering over the shape's red dot then select the, "Delete Shape" link. Your selection also sets the initial map view.



Specify an initial map view. Users are free to search outside this area: select this option to set the initial map view. Select the, "Set Map Area" link to open the map then, from the map, select a shape tool to select an area. Delete the area by hovering over the shape's red dot then select the, "Delete Shape" link. Users may still search outside the selected area.



10d Activation: activate, or disable, the IDX on your website.

IDX Enabled: display IDX on your webpage.

IDX Disabled: hide IDX from your webpage.

HTML: copy and paste the generated <iframe> directly into your webpage. If you're unfamiliar with coding, simply create a webpage by saving the following example text as, "myidx.html" (be sure, however, to replace the <iframe> with the one that was generated in Matrix™).

```html
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01//EN"
"http://www.w3.org/TR/html4/strict.dtd">

<html xmlns="http://www.w3.org/1999/xhtml">
<head>
   <title>My IDX Page</title>
</head>
<body>
<iframe src="http://mymls.com/Matrix/public/IDX.aspx?idx=xxxxxx"
width="860px" height="520px" frameborder="0" marginwidth="0"
marginheight="0"></iframe>
</body>
</html>
```

Referring Page: the page that referred visitors to your IDX.

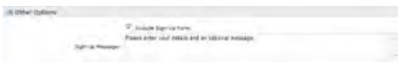
10e **Other Options:** offers additional IDX functionality depending on which IDX form is selected.

Style: when selecting, "Search" or, "My Listings" from the, "Form Selection" step, you are offered the following style options to help integrate the IDX with your website's color scheme.

Select a box to select a color or enter the specific hexadecimal color code.

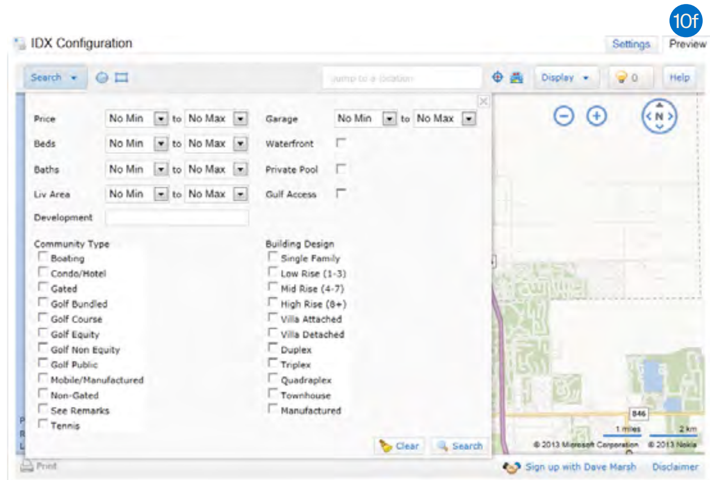
Sign-Up Form: when selecting, "Map Search" from the, "Form Selection" step, you are offered the option to allow users to sign up, from your website, as a new Matrix™ contact.

Select the, "Include Sign-Up Form" checkbox then either use the default sign-up message or write one of your own.



10f Select the, "**Preview**" tab to display how your Search, Listings or Map IDX will appear on your webpage.

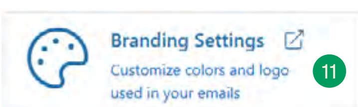
10g Use the **Button Bar** to delete the current IDX or select, "Save" to create a brand new one.



Branding Settings

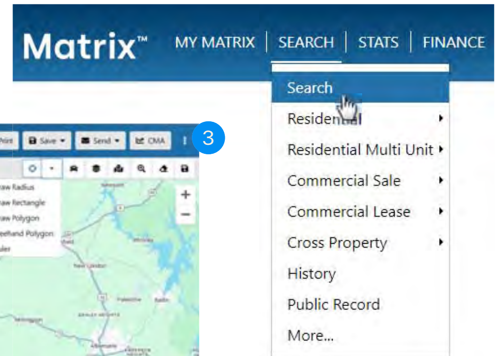
11 Select the "**Branding Settings**" link to manage how your branding appears to clients in email notifications, OneHome and MLS-Touch/Prospects Mobile.

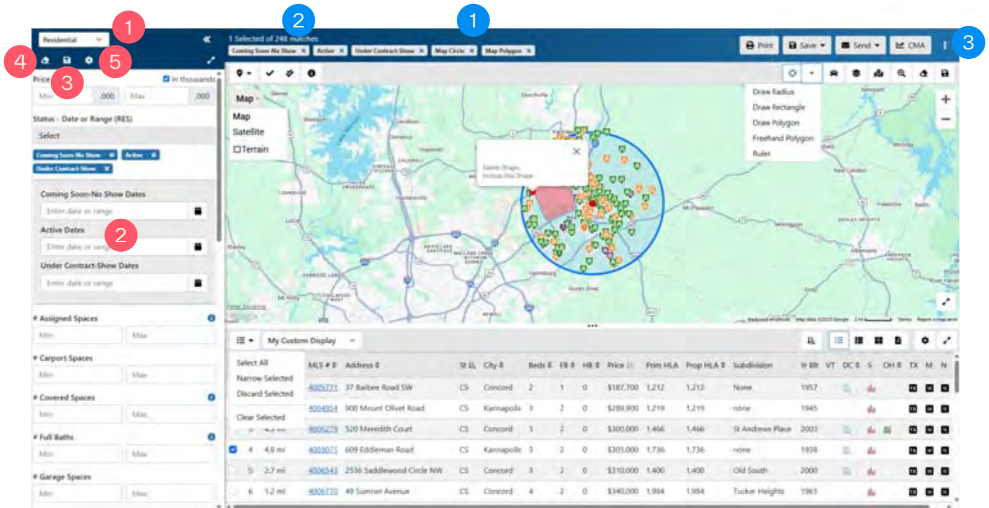
NOTE: *see "The Branding Center" section of this Quick Start Guide for more information.*



Search

From the Matrix™ navigation menu, hover the **Search** tab and select the **Search** item.





Information Bar

1. Search Criteria used in the current search.
2. Number of results.

   NOTE: *also displays, if any, the number of selected results.*
3. Action Buttons.

   NOTE: *some actions require at least 1 selected results.*

   NOTE: *for more information see, "Action Buttons" section.*

Criteria

1. From the **Criteria** section, select a Property Type to search.
2. Enter your search **criteria**

   NOTE: *map and Single Line results will automatically update.*

   NOTE: *see, "Criteria (Manage Fields)" to add, remove or reorder fields.*

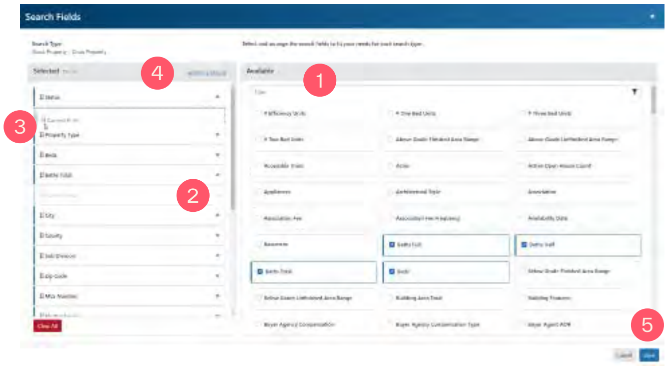
   NOTE: *select the* ***Open*** *arrow to show the Criteria drawer if it is closed.*
3. Select the **Save** icon to set the current criteria as the starting default for all future searches of the specified Property Type.
4. Select the **Clear** icon to clear all fields on the current criteria form.

   NOTE: *you will not lose your saved default criteria.*
5. Select the **Settings** icon to manage your default criteria fields.

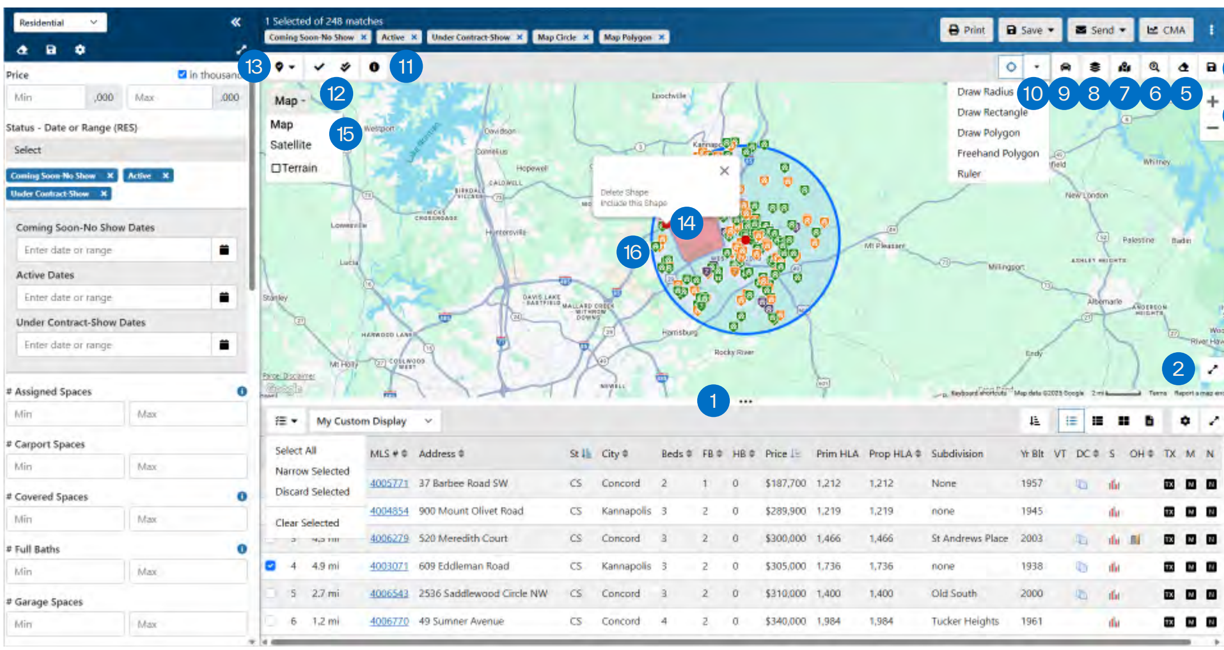
   NOTE: *for more information see, "Criteria (Manage Fields).*

Criteria (Manage Fields)

1. From the **Available** fields section, use the filter to search or, scroll through the list to select a specific field to **add** to your default criteria.



2. From the **Selected** fields section, select the X to **remove** the associated field from your default criteria.
3. From the **Selected** fields section, select and drag a field to **reorder** its position in the list.
4. **Reset** list to only show the system's default criteria fields.
5. **Save** your updated default criteria fields.



Map

1. Use the vertical **slider** to adjust the visibility of the map.
2. Select the **Expand** icon to view the map in fullscreen mode.
3. **Zoom** in (+) or out (–) of your desired location.

   NOTE: *select and drag the map to reposition the area.*

   NOTE: *if your search criteria generate between 500 and 5000 results, select the map cluster to display the listing for that area.*

4. Select the **Settings** icon to set the map's current position as the new default location.
5. **Clear** all map shapes.
6. Use the **Jump to Address** option to quickly locate a specific map area.
7. **Recenter** the map.
8. Select a map **layer** to overlay different types of information onto the base map.

   NOTE: *see the "Map Layers" section for more information.*

9. Select **INRIX DriveTime™** to isolate listings that are located within a certain driving distance of a specific address.

   NOTE: *INRIX DriveTime™ is not available in all Matrix™ systems.*

   NOTE: *see "INRIX DriveTime™" in the "Search" section for more information.*

10. Select a map **shape** to isolate specific locations on the map..
11. View the map **legend** to view map marker definitions.
12. **Select** a single or multiple properties.

    Single Check: select/deselect properties one-by-one.

    Multiple Check: select/deselect multiple properties by selecting and dragging your cursor over the desired properties.

13. Select **all properties** or just **all visible** properties.
14. Hover over a custom shape's **red dot** to select an option.

    Delete: delete the custom shape.

    Include: include properties inside the shape.

    Exclude: exclude properties inside the shape.

    Include Intersection Only: include only properties that are inside the area where multiple shapes intersect.

    Undo Intersection: include only properties that are outside of the area where multiple shapes intersect.

15. Select to view properties in either the **Map** or **Satellite** view.
16. Select a map marker to **preview** the property.

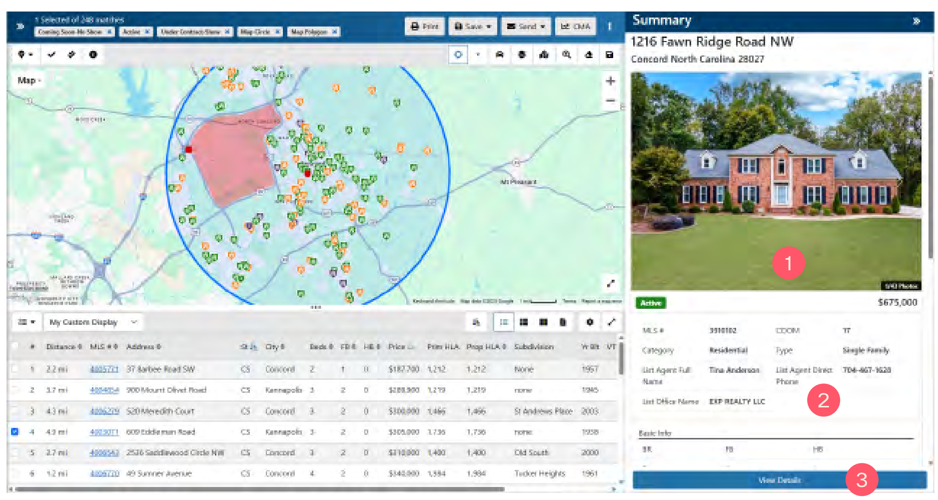
    NOTE: *for more information see, "Property Preview".*

Property Preview

1. Select the listing photo to access the **photo gallery** and **photo carousel**.

   NOTE: *for more information, see "View Photos" in the "Search" section.*

2. View this listing's **general details**.
3. Select the **"View Details"** button to view this listing's Full Agent Display.



View Photos

1. Select to view images either in the **thumbnail gallery** or the **photo carousel**.

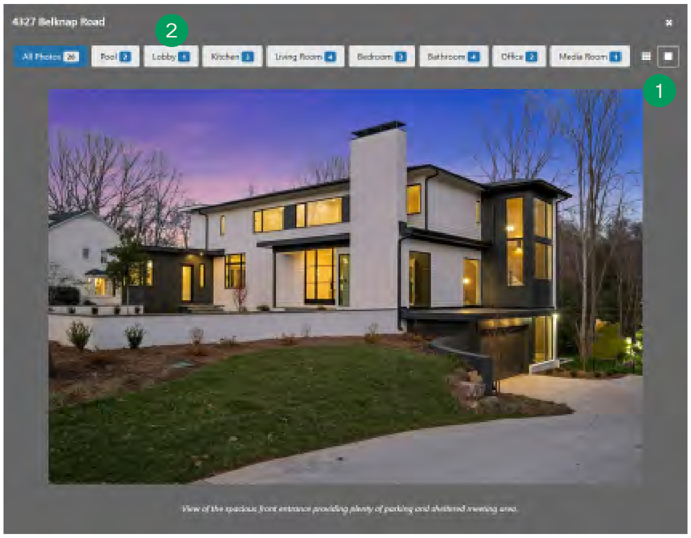
   Thumbnail Gallery: hover a thumbnail to read the photo description. Select the image to enlarge.

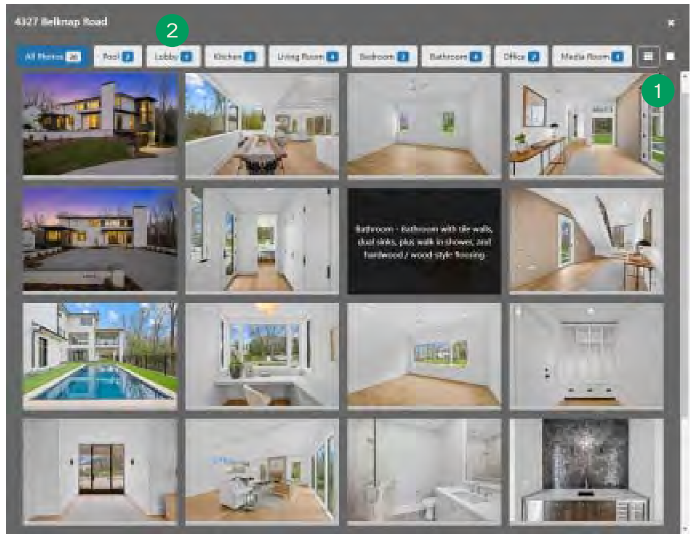
   Photo Carousel: use the previous and next arrows to navigate through the carousel images.

2. Select a **category** to view only images belonging to that photo type.

   NOTE: *select "All Photos" to view all photos belonging to this listing.*

   NOTE: *for more information, see "Photos (Add New)" in the Input section.*





Map Layers

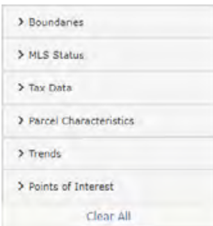
Design your own custom maps by choosing from dozens of layers of geographic information. Each layer can be displayed individually or mixed with others to create the perfect map to meet your needs.

NOTE: *only existing Realist® customers may have access to many Map Layers.*

NOTE: *you may be prompted to zoom in to enable certain map layers.*

1. Select the **Map** tab.

2. Select the, **Map Layers** icon to choose which of the map layers to activate.



NOTE: *select a section panel to expand category.*

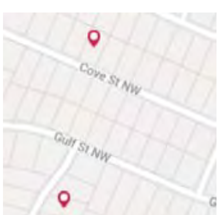
NOTE: *select the, "Clear All" button to reset the map layers.*

2a. Select to expand the, "**Boundaries**" section.

NOTE: *contains colored delineations of geopolitical entities.*

NOTE: *ctrl-select any shaded area for layer details.*

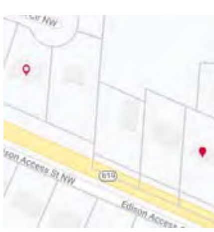
2b. Select to expand the, "**MLS Status**" section.



NOTE: *each listing status can now be visualized as a layer on the map. Permanent statuses - such as Sold and Expired - are filtered to only show recent listings.*

NOTE: *select a pin – or, the associated property - to access additional property information.*

2c. Select to expand the, "**Tax Data**" section.



NOTE: *pins represent each property which has had a recent sale recorded in public records data.*

NOTE: *select a pin – or, the associated property - to access additional property information.*

2d Select to expand the, "**Trends**" section.

Select to expand the, "**Property Characteristics**" section.

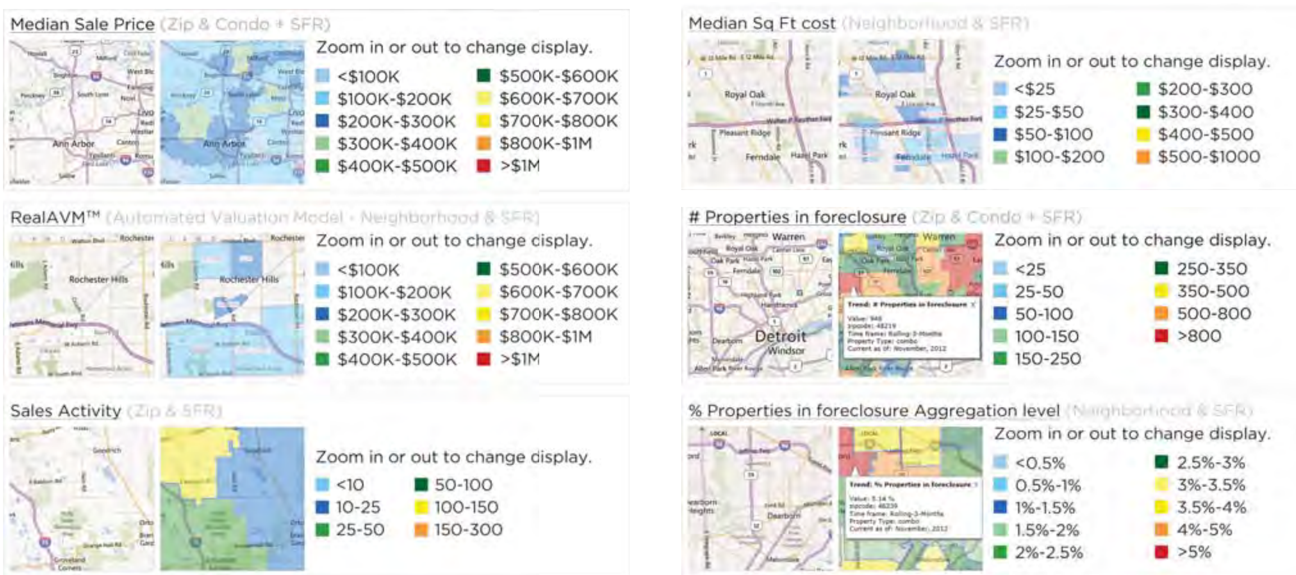
NOTE: *contains detailed information about individual properties.*

NOTE: *select any parcel for parcel details.*

2e Select to expand the, "**Trends**" section.

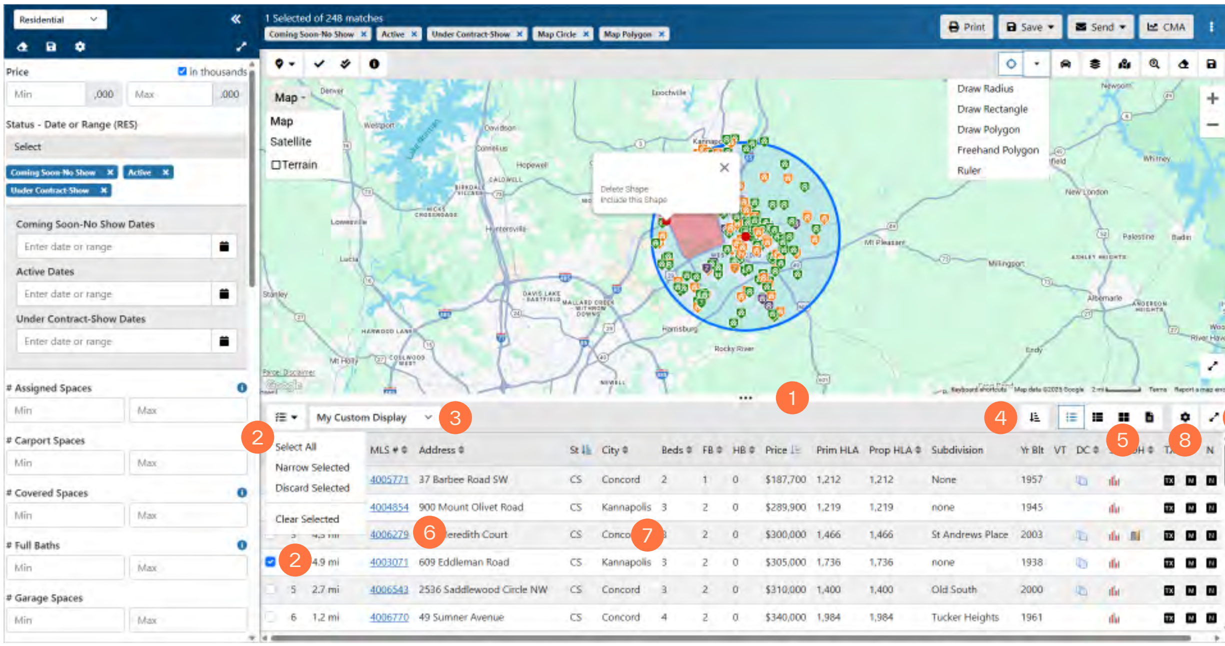
NOTE: *contains aggregated information available for condos, single-family, or both, for each of zip and neighborhood aggregation levels.*

NOTE: *ctrl-select any shaded area for layer details.*



2f Select to expand the, "**Points of Interest**" section.

NOTE: *Google-provided local business and community location markers.*



Results

1. Use the vertical **slider** to adjust the visibility of the map.
2. **Select/deselect** one or more of the results to work with.

   Select All: selects all results whether visible or not.

   Narrow Selected: keeps only the selected results.

   Discard Selected: removes selected results.

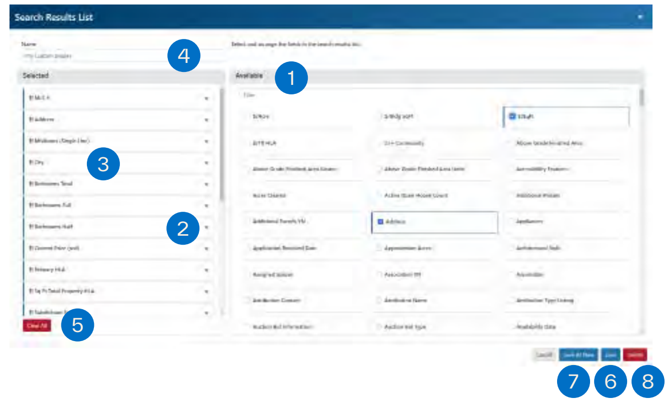
   Clear Selected: unselects all results.
3. Select a **Display.**
4. **Sort** your results.
5. Display results in either **List**, **Thumbnail**, **Gallery** or **Display View.**

   NOTE: *for more information, see "Display View" in the "Search" section.*
6. Select a **listing number** or Tax ID to view the Agent Full Display.
7. Select anywhere on a Single Line row to **preview** the property.

   NOTE: *for more information see, "Property Preview".*
8. Select the **Settings** icon to manage your default criteria fields.
9. Select the **Expand** icon to hide or show the map.

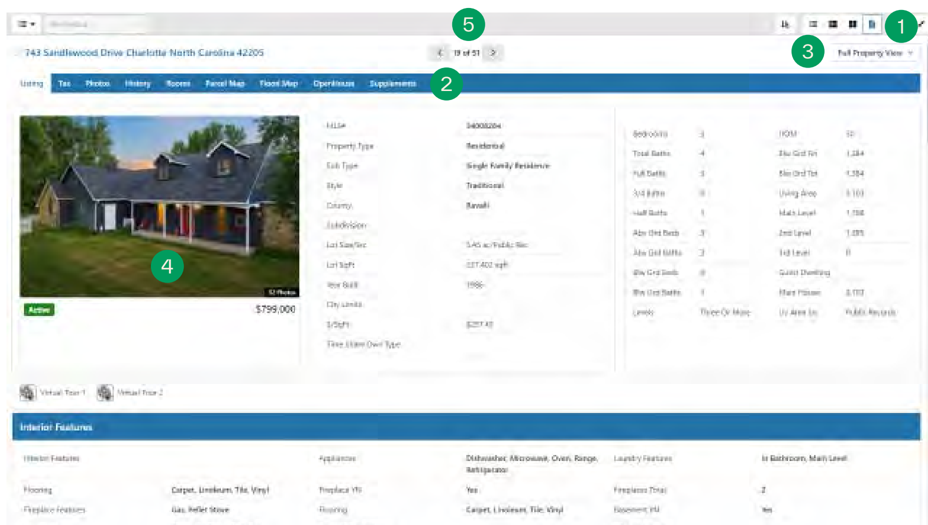
Results (Manage Fields)

Customize which field appear on your Single Line Display.



1. From the **Available** fields section, use the filter to search or, scroll through the list to select a specific field to **add** to your default criteria.
2. From the **Selected** fields section, select the X to **remove** the associated field from your default criteria.
3. From the **Selected** fields section, select and drag a field to **reorder** its position in the list.
4. Add a **name** to identify your custom display in the results dropdown list.
5. **Clear All** selected fields to build your list from scratch.
6. **Save** updates to your custom display.
7. **Save As** a new custom display.
8. **Delete** this custom display.

Display View



1. From the Results section, select the "**Display View**" icon.

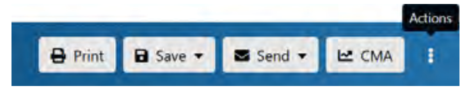
   NOTE: *this same Display can also be viewed by selecting the property's Listing Number.*

2. Select a **tab** to explore property details.

   NOTE: *specific tabs may vary.*

3. Select a different **Display.**
4. Select the **property photo** to enlarge the image or view the photo gallery.
5. View the **previous or next** property.

Action Buttons



1. After generating a search, view your results in either the Map or the Single Line Display.
2. Select one or more properties.
3. From the Action Buttons, select an action.

NOTE: *some actions do not require any selected properties.*

Print: print selected properties in a Display, Report, Map and other formats. Additional options include:

Print Header and Footer: choose to add your branding to each page or just the first and last.

Print Search Criteria: print the criteria used to generate the search.

Print with roll-outs (if any) open: roll-outs help keep Matrix™ Displays organized by collapsing specific sections. When open, print the information contained within the section.

Include Supplements in PDF (max 1 listing): includes 1 listing's supplements when printing to .pdf.

Save: save the current search criteria as a New Saved Search to use in the future either for yourself or for a specific client.

Send

Email: send one, or more, of your contacts a direct email that includes your selected properties.

Auto Email: automatically sends properties—based on the search criteria—to a specific contact at scheduled times (for more information see, "Auto Email (Create)" in the 'Auto Email" section).

Share Link: generate a custom URL to share your selected properties with a prospect.

CMA: initiates a new CMA by adding the selected properties to the "New CMA" drawer.

NOTE: *see "Create CMA" in the "CMA Manager" section.*

Actions: select the kebab (⋮)to display additional actions.

Directions: using the selected properties, creates custom, turn-by-turn driving directions that can be exported to Google Maps and, if desired, your mobile device.

Statistics: generate tabular stats using all—or, just the selected—properties.

Export: exports your selected properties as a .csv file using either System-defined or Custom fields (for more information, see "Custom Exports" in the "Settings" section).

Carts: adds any selected properties to one or more carts.

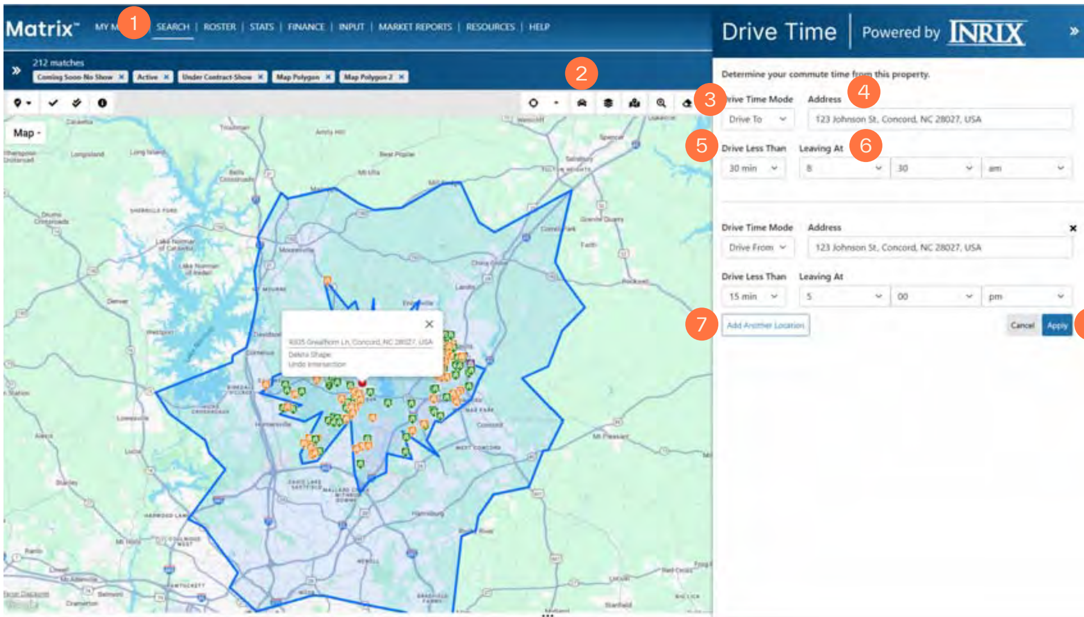
Quick CMA: uses the selected properties as Comparables in a Quick CMA .pdf.

Switch to Classic: displays results in the Classic search using the same criteria from the 3 Panel Search

NOTE: *any selected properties will remain selected in Classic.*

INRIX Drive Time™

Included as an option in some Matrix™ systems, INRIX Drive Time™ allows agents to isolate listings that are located within a certain driving distance of a specific address.



1. Choose any method to generate your **search** results.

   NOTE: *for more information, see the, "Search" section.*

2. From the "Map" panel, select the "**INRIX**" icon.

   NOTE: *INRIX DriveTime™ is not available in all Matrix™ systems.*

3. Select a **DriveTime Mode**.

   Drive To: displays all listings within X minutes of driving to a specific address.

   Drive From: displays all listings within X minutes of driving from a specific address.

4. Add a destination **address** (Drive To) or the origin **address** (Drive From).

5. Select "**Drive Less Than**" to add the maximum number of minutes you want to drive.

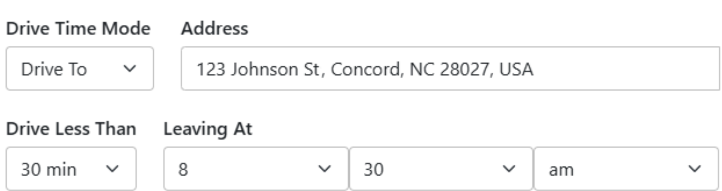
6. Select what time (including am or pm) you expect to **leave at**.

7. Select the "**Add Another Location**" button if you'd like to view DriveTimes for multiple locations or roundtrip DriveTimes for the same location.

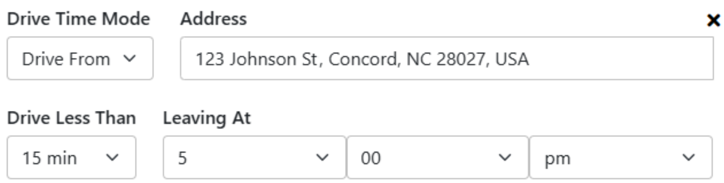
   NOTE: *see "Roundtrip Example" below.*

Roundtrip Example

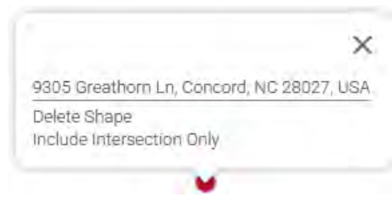
You work at 123 Johnson Street and you want to see all listings within a 30 minute **drive to** work if you leave your new home at 8:30am.



You work at 123 Johnson Street and you want to see all listings within a 15 minute **drive from** work if you leave at 5:00pm.



8 Select the "**Apply**" button.



NOTE: *if adding multiple locations that intersect, hover a shape's red dot and select "Include Intersection Only" to only include listings that satisfy all DriveTime™ requirements.*

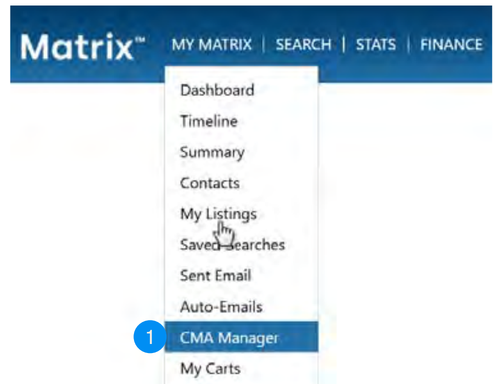
NOTE: *hover a shape's red dot and select "Delete Shape" to delete an individual shape or select the "Clear All Shapes" icon to clear all shapes from the map.*

CMA Manager

The CMA Manager is a powerful tool designed to simplify the creation, customization, and sharing of Comparative Market Analyses (CMAs). It enables users to streamline their workflow by organizing and editing CMAs efficiently, offering features like automated property comparisons, tailored report personalization, and various display formats for client presentations. Whether you're building CMAs from scratch or refining existing ones, the CMA Manager ensures a seamless experience for all real estate professionals.

CMA Dashboard

Create a New CMA Report or quickly access an existing one.



1. From the Matrix™ navigation menu, hover "My Matrix™" and select "**CMA Manager**".

2. Select the "**New CMA Report**" button to create a new CMA.

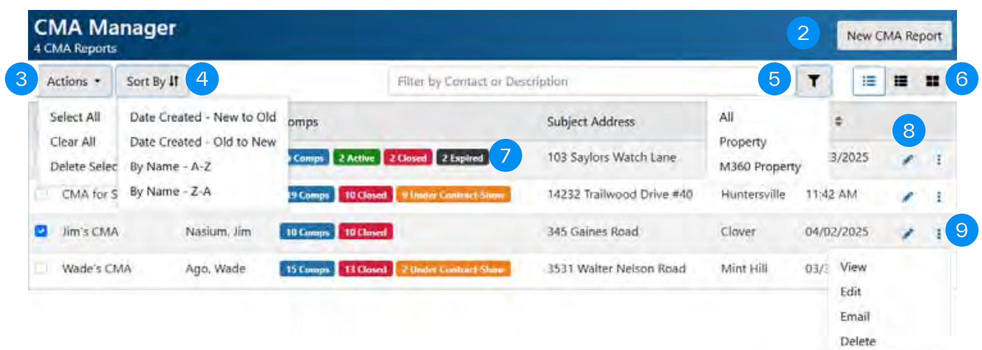
   NOTE: *see "Create CMA" in the "CMA Manager" section for more information.*

3. Select a CMA Action.

   Select All: selects all CMAs.

   Clear All: clears all selected CMAs.

   Delete Selected: deletes all selected CMAs.



4. Select a CMA **Sort By** order.

   Date Created – New to Old: displays newest CMAs first

   Date Created – Old to New: displays oldest CMAs first.

   By Name – A-Z: displays CMAs numerically/alphabetically ▼ by description name.

   By Name – Z-A: displays CMAs numerically/alphabetically ▲ by description name.

5. Enter a contact or description to filter the CMA list.

   All: view all CMAs in the list.

   Property: view CMAs that were created by initially starting in the CMA Manager. Also includes CMAs that were created by first generating search results and then selecting Comparable properties to import into a CMA.

   M360 Property: CMAs that were created by starting with a Subject property and then selecting the "View Comparable Properties" button in the property's Full Display.

6. Select a **View** to display the CMAs.

   List View: display CMAs in an ordered list.

   Thumbnail View: display CMAs with a thumbnail image.

   Gallery View: display CMAs with a larger image.

7 Select anywhere in a row to view a **Summary** of the associated CMA.

NOTE: *each Summary includes property details, the contact's email address as well as the option to Edit, View and Email the CMA.*

8 Quick access to **edit** the CMA.

NOTE: *see "Edit CMA" in the "CMA Manager" section for more information.*

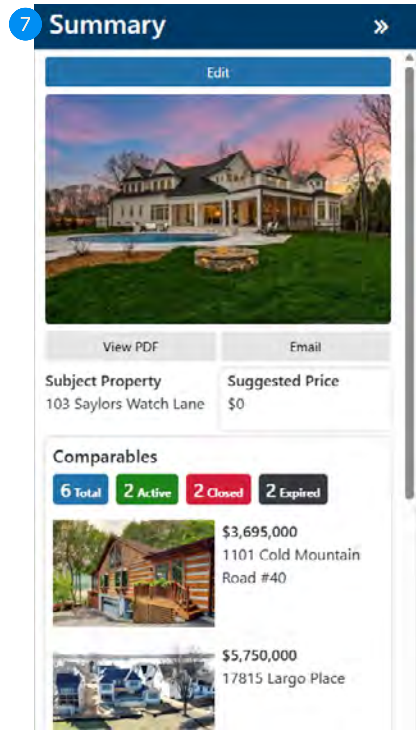
9 **Manage** the CMA.

View: view the CMA Report (.pdf).

Edit: edit the CMA.

Email: email contact(s) a link to the CMA Report.

Delete: delete the CMA.



Create CMA

1 From the Matrix™ navigation menu, hover "My Matrix™" and select "**CMA Manager**".

2 Select the "**New CMA Report**" button.

New CMA Report

3 Add the **Subject Property**.

3a Begin typing the Subject Property's **address** into the textbox.

3b Select the Subject Property from the **list of suggestions**.

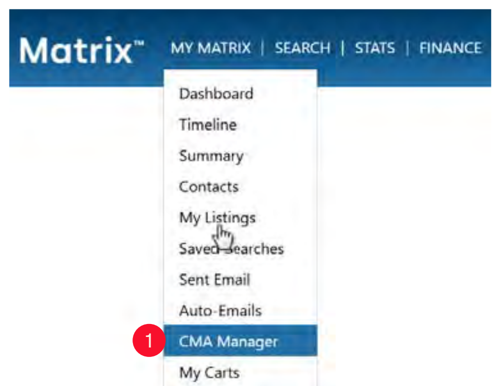
NOTE: *select the "Create New Subject Property" option if the address does not appear in the list.*

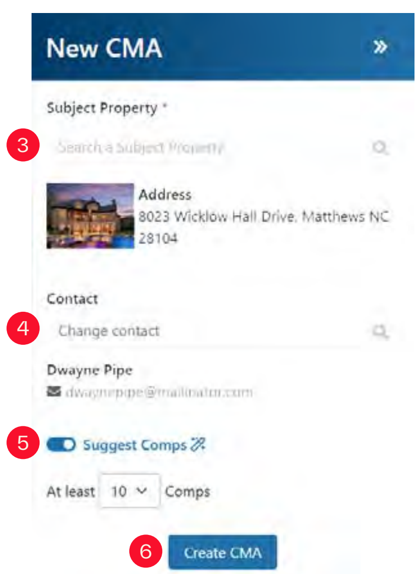
4 Add a **Contact**.

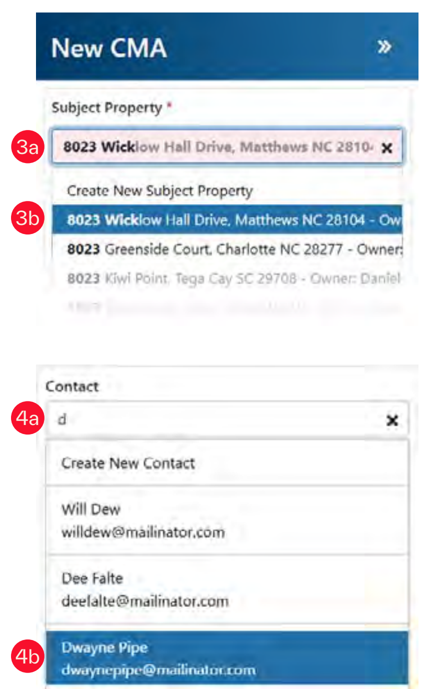
4a Begin typing the contact's **name** into the textbox.

4b Select the contact from the **list of suggestions**.

NOTE: *select the "Create New Contact" option if the contact does not appear in the list.*







5 Enable the “**Suggest Comps**” option if you would like Matrix™ to find comparable properties.

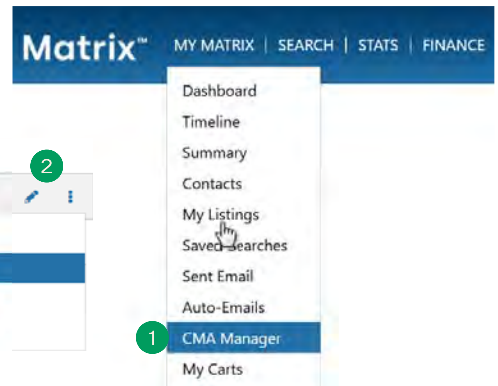
5a Select **how many** comparable properties Matrix™ should suggest.

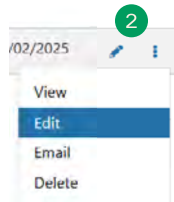
NOTE: *you're also able to add (and, remove) comparable properties after the CMA has been created.*

6 Select the “**Create CMA**” button.

NOTE: *see “Edit CMA” in the “CMA Manager” section for more information.*

Edit CMA





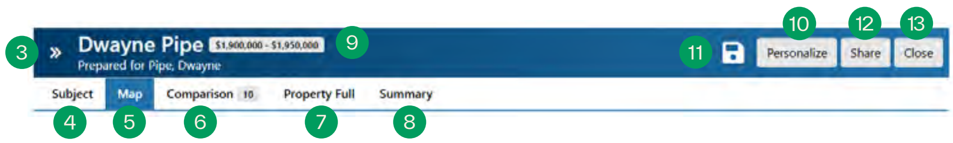
1 From the Matrix™ navigation menu, hover “My Matrix™” and select “**CMA Manager**”.

2 Select a CMA's Quick “**edit**” icon.

NOTE: *alternatively, select the kebab menu (⁝) to access the “Edit” option.*

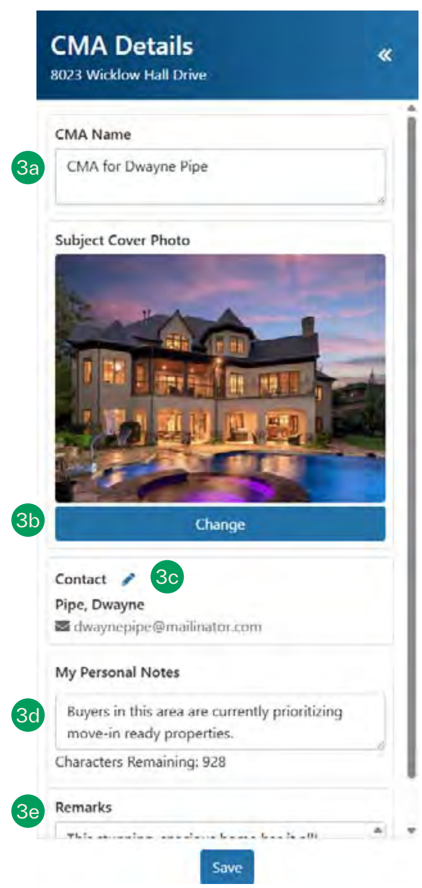
3 Select the chevron to access—and modify—the **CMA Details.**

3a Edit the **Name** to help you identify this CMA.



3b Select the “**Change**” option to upload a different Cover Photo.

NOTE: *deleting your uploaded image will automatically default to the original Cover Photo.*



3c Update the **Contact** for this CMA.

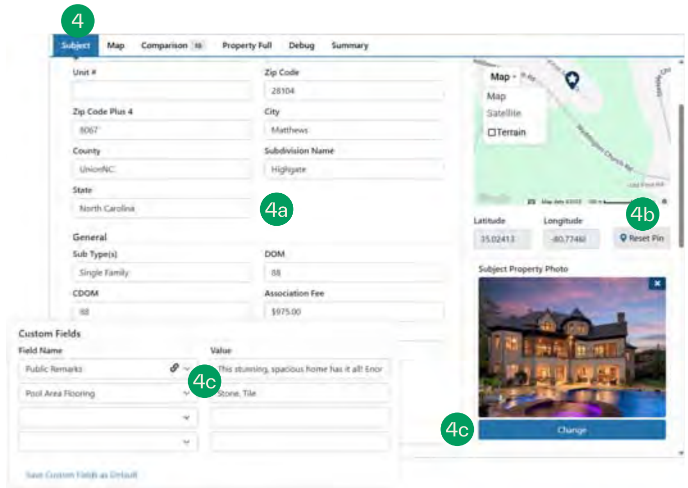
3d Add/Edit a **Personal Note** to this CMA.

NOTE: *personal notes are not visible within the CMA.*

3e View this listing's Public **Remarks**.

NOTE: *from the navigation tab, select “Subject” to include a custom Public Remarks field in this CMA.*

4 Select the **Subject** tab to edit the Subject Property details.



4a Fill in **default fields** that define the Subject Property.

4b Select the **"Reset Pin"** button to reposition the location pin on the map.

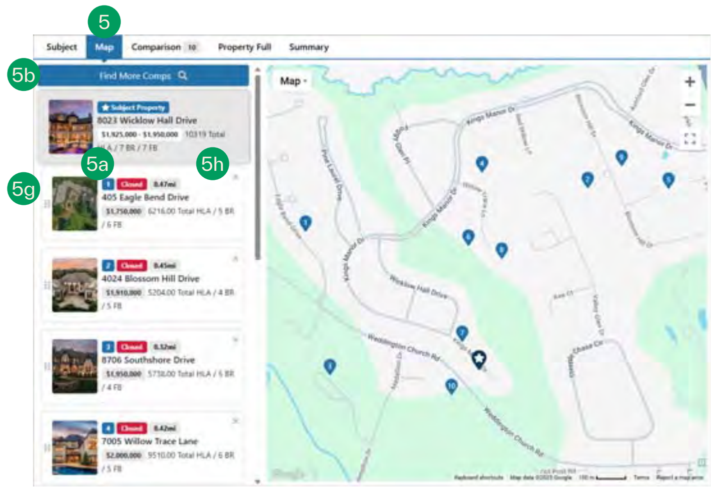
NOTE: *using your mouse pointer, simply click where the pin should appear.*

4c Fill in **custom fields** that define the Subject Property.

NOTE: *add your own field or choose from all available system fields (represented with a "link" icon).*

NOTE: *select the "Save Custom Fields as Default" link to set the current custom fields as the default.*

5 Select the **Map** tab to add and delete Comparable Properties.



5a **Identify** where this Comparable Property is located on the map.

5b Select the **"Find More Comps"** button to search for additional Comparable Properties.

5c Select the **"Carts"** button Carts to add Comparable Properties from an existing cart or add **search criteria** to generate new results.

NOTE: *see "Action Buttons" in the "Search" section for more information.*

5d **Select** ☑ which Comparable Properties to add to this CMA.

5e Select the **"+ Add Selected To CMA (x)"** button + Add Selected To CMA (24) to add the selected properties to the CMA.

NOTE: *where "x" represents the number of remaining properties that you're able to add to this CMA.*

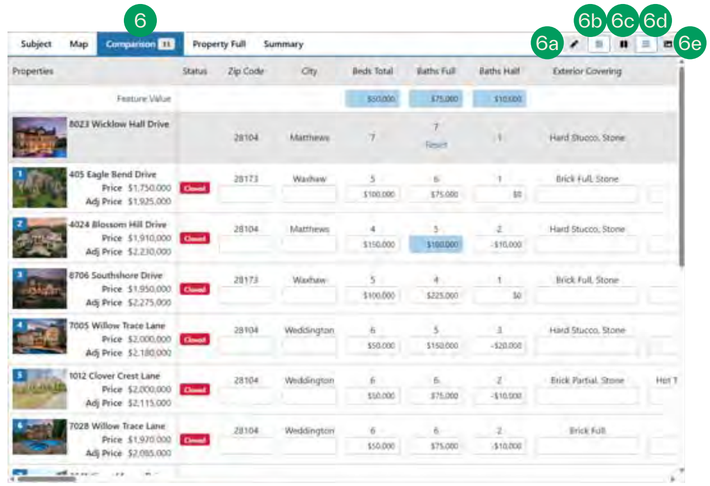
5f Select the **"Cancel"** button ✕ Cancel to cancel this operation and return to editing the CMA.

5g Select a Comparable Property's handle to **drag and drop** it into a new position on the list.

NOTE: *the properties order in the list determines the sequence in which they appear in the CMA Report.*

5h Select a Comparable Property's "x" icon to **delete** this property.

6 Select the **Comparison** tab to view side-by-side comparisons between the Subject Property and its Comparable Properties.

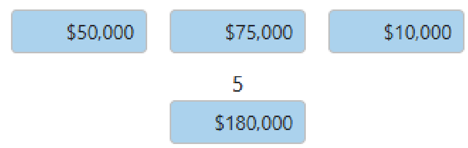


6a Select the **Edit Fields** button to choose which fields to use when comparing the Subject Property with the Comparable Properties.

NOTE: *this feature is not available in "Photos View" mode or while the "Make Adjustments" option is enabled.*

6b Select the **Make Adjustments** button to adjust the price of specific Comparable Property attributes.

NOTE: *enter a feature's value in the "Feature Value" textbox to automatically adjust the value for each Comparable Property (only available while in Horizontal View). Highlighted prices represent manual overrides.*



NOTE: *price adjustments are not available in "Photos View" mode.*

NOTE: *select the "Reset" link to clear all custom values.*

6c Select the **Vertical View** button to compare the Subject Property with Comparable Properties.

NOTE: *property information is presented vertically.*

NOTE: *select a Comparable Property's "x" icon to delete this property.*

6d Select the **Horizontal View** button to compare the Subject Property with Comparable Properties.

NOTE: *property information is presented horizontally.*

6e Select the **Photos View** button to compare image thumbnails of the Subject Property with image thumbnails of Comparable Properties.

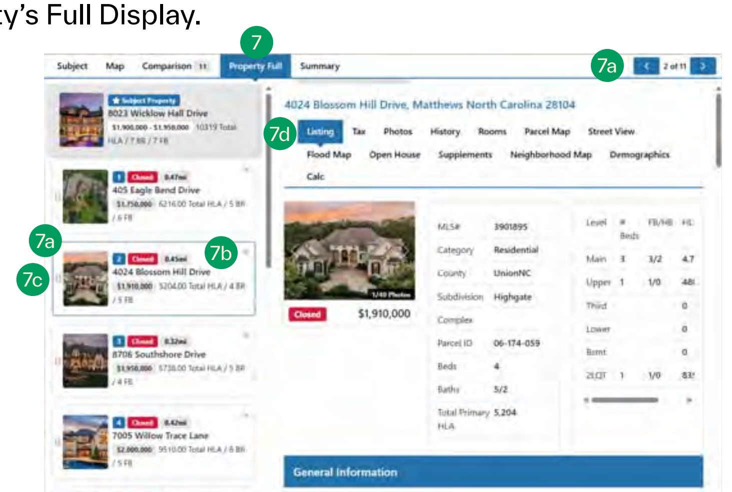
NOTE: *image thumbnails are presented horizontally.*

NOTE: *select an image tag* Kitchen/Dining Bedrooms *to filter photos containing that feature.*

NOTE: *price adjustments are not available in "Photos View" mode.*

NOTE: *select a Comparable Property's "x" icon to delete this property.*

7 Select the **Property Full** tab to view each property's Full Display.



7a **Select a Comparable Property** to view full property details.

NOTE: *optionally, use the forward/back arrow to navigate through each Comparable Property.*

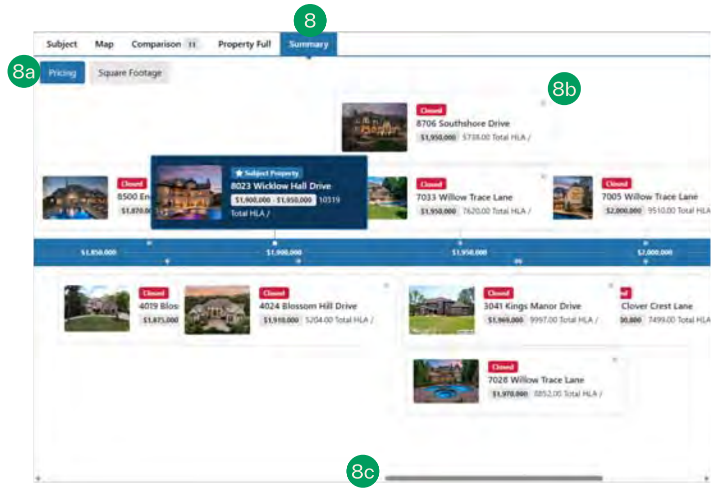
7b Select a Comparable Property's handle to **drag and drop** it into a new position on the list.

NOTE: *the properties order in the list determines the sequence in which they appear in the CMA Report.*

7c Select a Comparable Property's "x" icon to **delete** this property.

7d Select a listing's **attributes tab** to view its full details.

NOTE: *see "Display View" in the "Search" section for more information.*



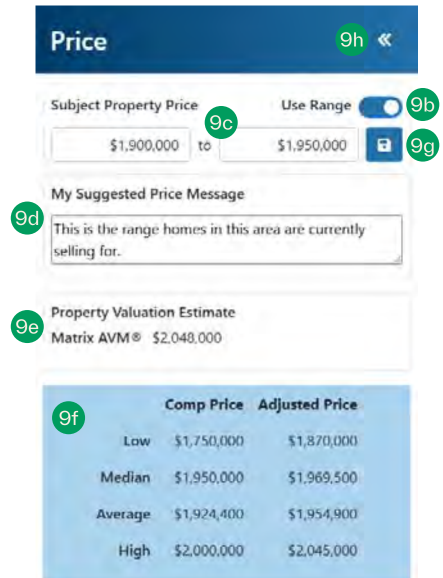
8 Select the **Summary** tab to view a scale of where the Subject Property fits relative to the Price and Square Footage of each Comparable Property.

8a Select the "**Pricing**" option to switch to the Price Scale or the "**Square Footage**" option to switch to Square Footage.

NOTE: *see "Display View" in the "Search" section for more information.*

8b Select a Comparable Property's "x" icon to **delete** this property.

8c Drag the **horizontal scrollbar** to reveal properties that may be out-of-view.



9 Add a suggested list **Price** for this Subject property.

9a Select the "**+ Suggested Price**" button.

9b Select the "**Use Range**" toggle to suggest a price range.

9c Add a **Subject Property Price** or price range.

9d Add a **Suggested Price Message** to justify the suggested price or price range.

9e View **Property Valuation Estimate.**

NOTE: *Matrix™ AVM® (Automated Valuation Model) is a Cotality-derived value and should not be used in lieu of an appraisal.*

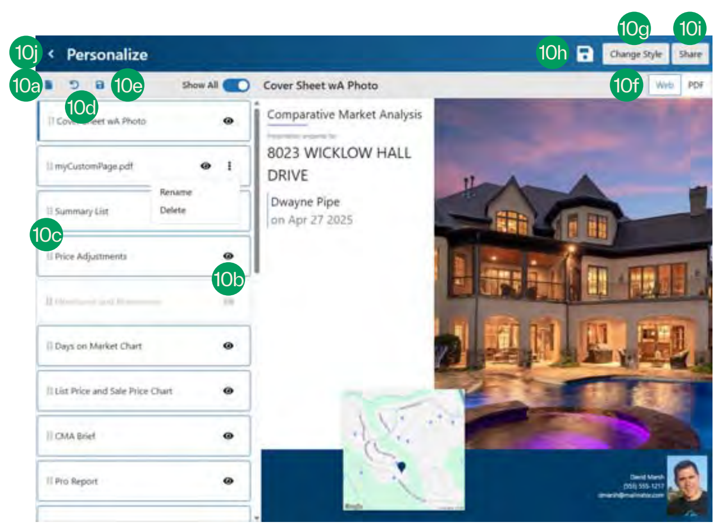
9f View the **Low**, **Median**, **Average** and **High Comparable** price values and—if added—Adjusted price values.

NOTE: *to adjust the price of individual Comparable property items, select "Comparison" from the navigation tab and then select the "Make Adjustments" icon.*

9g Select the **Save** icon to save any changes and return to editing the CMA.

9h Select the **chevron** to close the price drawer and return to editing the CMA.

NOTE: *any changes will not be saved.*



10 Select the "**Personalize**" button to add/remove pages in this CMA Report.

10a Select the "**Add**" icon to add a custom page to this CMA Report.

NOTE: *select the kebab menu (⋮) to access the "Rename" and "Delete" options.*

10b Select a page's **eye** icon to include or remove a page in this CMA Report.

NOTE: *disable the "Show All" toggle to only view the pages included in this CMA Report.*

NOTE: *select a mode to preview how the selected page appears in a Web browser or PDF document.*

10c Select a handle to **drag and drop** the page into its new position in this CMA Report.

NOTE: *the page order in the list determines the sequence in which they appear in the CMA Report.*

10d Select the **Reset icon** to undo all changes and revert pages back to the system default.

10e Select the **Save icon** to save the current pages—in order—as the new default.

10f Select a **Preview** mode.

Web: interactive web-based CMA (available only in select systems).

PDF: document-based CMA.

10g Select the "**Change Style**" button to choose a new presentation style for this CMA Report.

10h Select the "**Save**" icon—at any time—to save this CMA.

10i Select the "**Share**" button to send this CMA Report to both contacts and non-contacts.

10j Select the **chevron** to return to editing the CMA.

11 Select the "Save" icon—at any time—to save this CMA.

NOTE: *modified CMAs will also auto-save and appear on the CMA Dashboard as auto-saved until manually saved.*

12 Select the "**Share**" button to send this CMA Report to both contacts and non-contacts.

12a. Select the "**View Presentation**" button to view this CMA Report (.pdf).

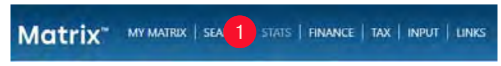
12b. Enable the "**BCC me a copy of all emails**" option to receive a link to this CMA report.

13 Select the "**Close**" button to close this CMA and return to the CMA Dashboard.

Stats

Stats (Preset)

1. From the Matrix™ navigation menu, select, “**Stats**”.



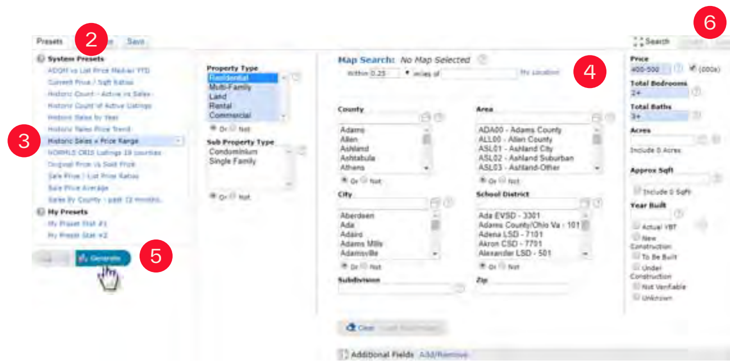
2. Select the, “**Presets**” tab.
3. Select a **Preset statistic link.**
4. Select criteria from the, “**Search**” tab.
5. Select an **action.**

   Print: print the generated stat.

   Email: email the generated stat.

   Generate: generates a stat using your current criteria.

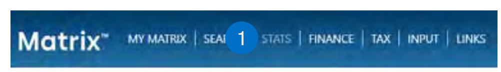
   NOTE: *when generating a stat from, “My Presets” you will be given the option to use your current criteria or the criteria that was originally saved with the preset.*



6. Select a tab to **view your stat** either as a chart or in data rows.

Stats (Customize)

1. From the Matrix™ navigation menu, select, “**Stats**”.



2. Select the, “**Customize**” tab.
3. Select your custom **stat settings.**

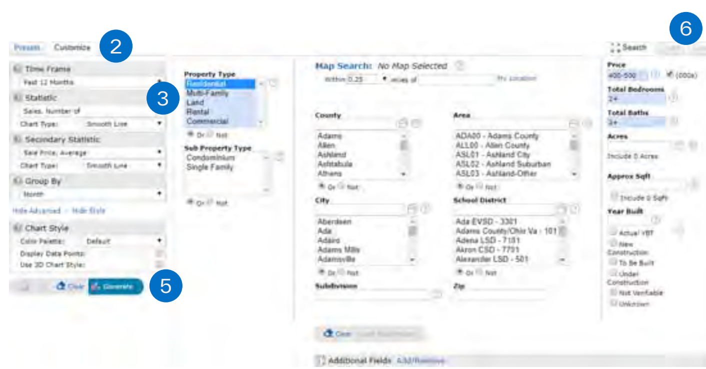
   Time Frame: a collection of preset time frame options – including custom.

   Statistic: a collection of stats to generate.

   Group By: groups stats on a chart according to your selection.

   Advanced Options: enables the ability to include an additional stat.

   Style Options: enables the ability to add custom styles to the chart.



4. Select criteria from the, “**Search**” tab.
5. Select an **action.**

   Print: prints the generated stat.

   Email: emails the generated stat.

   Clear: clears the current stat settings.

   Generate: generates a stat using your current criteria.

6. Select a tab to **view your stat** either as a chart or in data rows.

Stats (Save)

1. After adding your criteria to a, “Preset” or, “Customize” stat, select the, “**Save**” tab.

2. Select your custom stat **Save settings.**

   Name: rename your custom stat (optional).

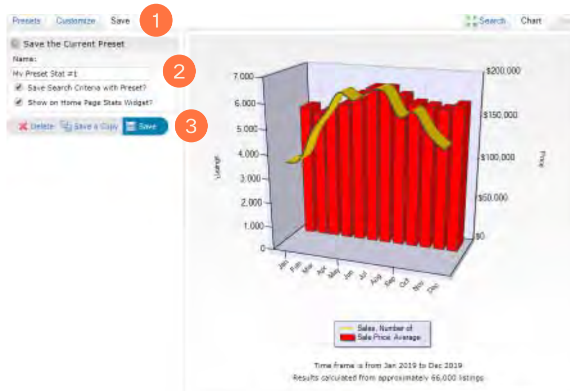
   Save Search Criteria with Preset: saves your criteria along with this custom stat (optional).

   Show on Home Page Stats Panel: includes this custom stat in the Home Page Stats Panel.

3. Select an **action.**

   Save: saves the current stat as a preset or overwrites the preset with the same name.

   Save a Copy: make a duplicate of the current stat.



My Preset Stat #1 Search Chart Data

Month	Sales, Number of	Sale Price, Average
Jan	3,644	$155,953
Feb	3,799	$148,596
Mar	4,941	$157,156
Apr	5,711	$162,829
May	6,549	$174,471
Jun	6,290	$183,050
Jul	6,626	$183,464
Aug	6,727	$176,238
Sep	5,810	$168,817
Oct	6,026	$166,886
Nov	5,191	$164,831
Dec	4,740	$170,053

Export as CSV

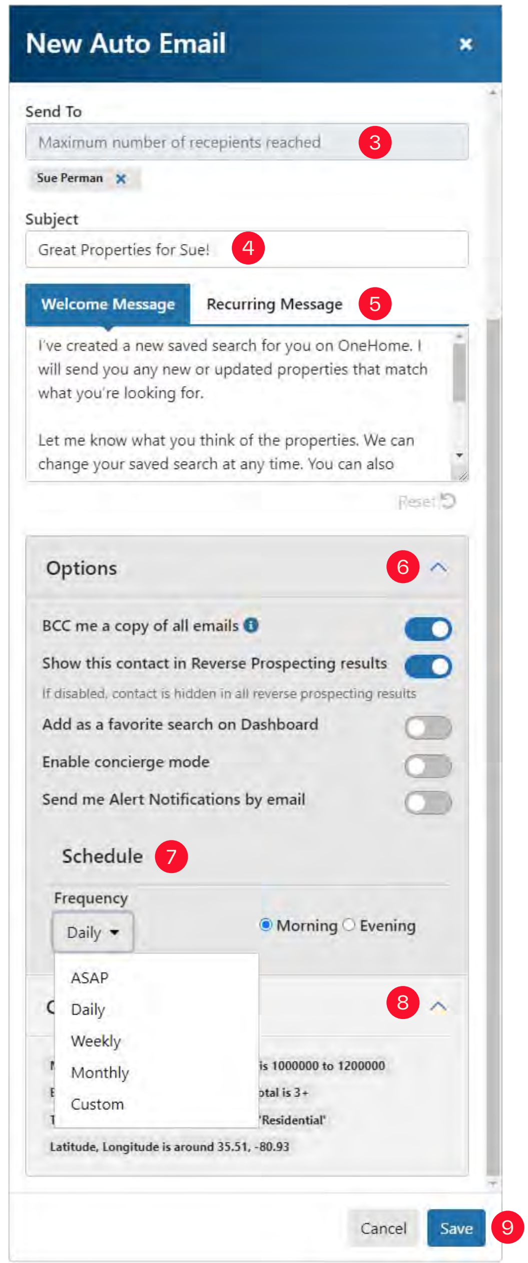
Time frame is from Jan 2019 to Dec 2019
Results calculated from approximately 66,000 listings

Auto Email

Create an Auto Email that automatically notifies clients whenever new — or, updated — properties match their criteria.

NOTE: *Classic Auto Email functionality can only be accessed by generating results using the Classic Search (for more information, see the "Search (Classic)" section).*

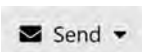
Auto Email (Create)



1. From the 3 Panel Search section, add criteria to generate your desired results.

   NOTE: *for more information, see the, "Search" section.*

2. Select the "**Send**" button > "**Auto Email**".

3. **Send To:** begin typing a client's name then select a contact from the available matches (mandatory).

   NOTE: *select the "Create New Contact" option to add a contact not currently in your address book.*

4. **Subject:** add an email subject line (mandatory).

5. Use the default "**Welcome Message**" and "**Recurring Email**" or, customize the text to create your own message for the current Auto Email.

   NOTE: *select "Reset" to undo your custom message.*

6. **Options:** expand the Options panel to view additional settings for this Auto Email.

   BCC me a copy of all emails: enable this option to send yourself a notification each time your client is sent a notification. Your notification will also include a link to view this Auto Email within your client's OneHome portal.

   Show this contact in Reverse Prospecting results: enable this option to allow a listing agent to view that their listing has been sent to this contact.

   Add as a favorite search on Dashboard: enable this option to add this search to the "My Favorite Searches" panel located on the Dashboard.

   Enable concierge mode: enable this option if you would prefer to review (approve or rejects) each listing before they are sent to the client.

   Send me Alert Notifications by email: when in Concierge Mode, enable this option to be notified – by email – that there are listings waiting for your approval in Matrix™.

7 Schedule: choose how often you would like Auto Emails sent.

ASAP: a notification is sent as soon as a new, or updated, property matches.

Daily: a notification is sent each day there are matches - either in the morning or evening.

Weekly: a notification is sent on a specified day - once a week.

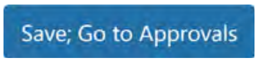
Monthly: a notification is sent on the first day of the month.

Custom: a notification is sent on all specified days – either in the morning or evening.

8 Criteria: expand the Criteria panel to view the criteria used in this Auto Email.

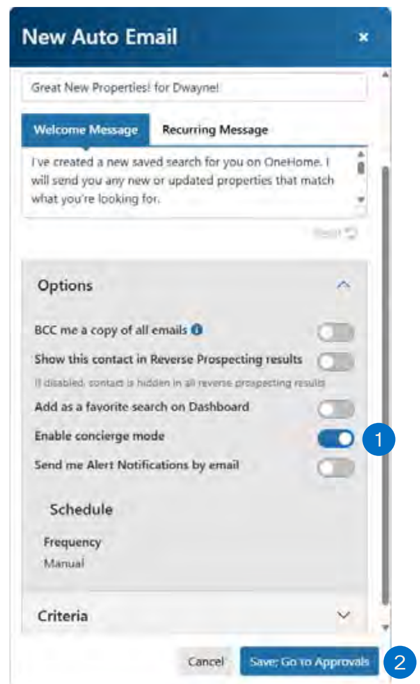
9 Select the "**Send**" button to create this Auto Email.

NOTE: *if "Concierge Mode" is enabled, this button takes the agent to the Concierge area where listings can be accepted or rejected.*



Concierge Mode

With Concierge Mode enabled, Auto Email notifications will not be sent to the client until listings have been approved by the agent.



1 In the Auto Email's "Options" section, enable "**Concierge Mode**".

NOTE: *see "Auto Email (Create) in the "Auto Email" section for more information.*

2 Select the, "**Save; Go to Approvals**" button to save this Auto Email's settings and proceed to the Concierge's approval page.

3 Hover an **icon** to view what each column represents.

Agent Picks: select a listing to recommend this property as an "Agent Pick" in your client's OneHome portal.

Emailed: displays an envelope icon if this listing has previously been sent to this contact.

NOTE: *hover a listing's icon to view the date and time sent.*

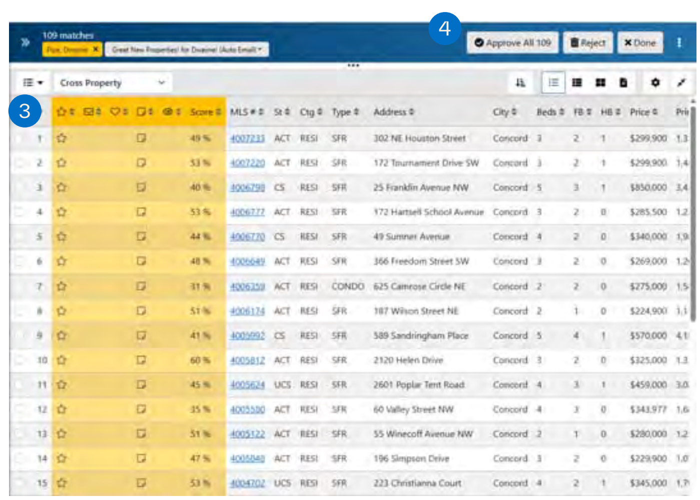
Favorites and Dislikes: displays an icon if the property has been favorited (heart) or disliked (thumbs down) by this OneHome client.

Notes: displays a note icon if this listing has any associated notes or messages.

Views: displays the number of listing views for this client in OneHome.

Score: displays how much of a match (%) this property is – based on this client's PropertyFit responses in OneHome.

NOTE: *more than one "Score" column represents additional Group Member's scores.*



4 Select an **action**.

Approve All: sends all listings to the recipient(s).

NOTE: *you may also select just the specific listings that you'd like to approve or reject.*

Reject: removes all selected listing(s) from being sent.

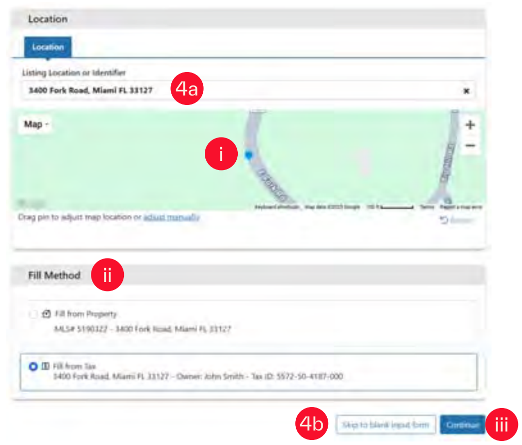
Actions: access additional listing options.

NOTE: *see "Action Buttons" in the "Search" section for more information.*

Listing Manager

Add Listing

1. From the Matrix™ navigation menu, select "**Input**".
2. Select the "**Add**" button.
3. Select the **Property Type** that you'd like to add.
4. Choose how you'd like to **fill** the Input form.



   4a **Fill from Property or Tax:** enter the street address, Listing ID or tax information of the existing listing from which to fill.

      i From the **Location Map** ensure that the property pin is in the correct position.

      NOTE: *if not, either select the pin and drag it to where it should appear or select the link to update the property's latitude and longitude.*

      NOTE: *after adjusting the pin, this will leave a "ghost" image of where the pin initially appeared.*

      NOTE: *select "Revert" to return the pin to its original position.*

      ii From the "**Fill From**" dropdown list, select either "Fill from Property" or "Fill from Tax".

      iii Select the "**Continue**" button.

   4b **Start with an empty form:** select "Skip to blank input form" to begin the input process with empty fields.

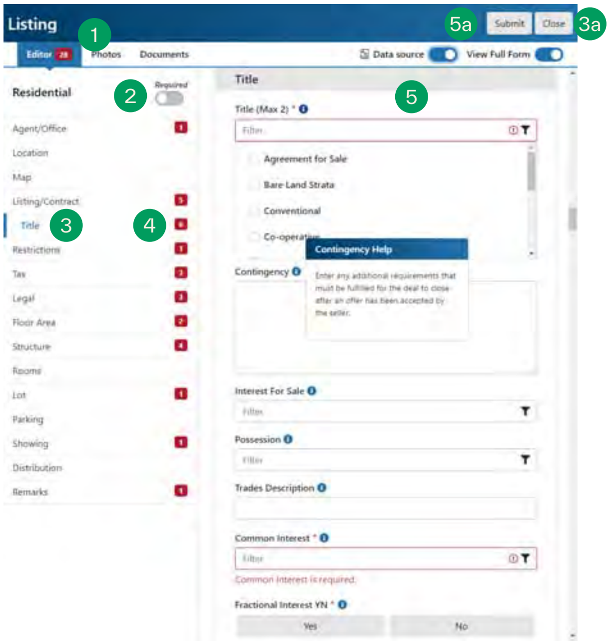
Actions

1. From the Listing page, select an **action**.

   Submit: saves new listings to the selected status (ie Incomplete/Active/Coming Soon) and updates existing listings with any modified information.

   Close: cancels this input session.

Editor



1. From the Listing page, select the "**Editor**" tab.

   NOTE: *the badge, if visible, represents the total number of required fields yet to be filled on the form.*

2. Toggle switch on to show only the **required** fields or off to show all fields.

3. **Select a section** to jump immediately to that location on the form.

   3a. When the **View Full Form** switch is disabled, only the form section that is selected to the left is displayed.

4. Select a required field(s) **badge** to jump immediately to the first required field in that section.

   NOTE: *if the badge indicates more than one remaining required field, then selecting it again will jump to the next required field in that section.*

5. **Fill** in all required and any optional fields.

   NOTE: *for a mouse-free experience, use your keyboard's "tab" key to jump to the next field on the form. Then use the arrow and enter keys to make a selection.*

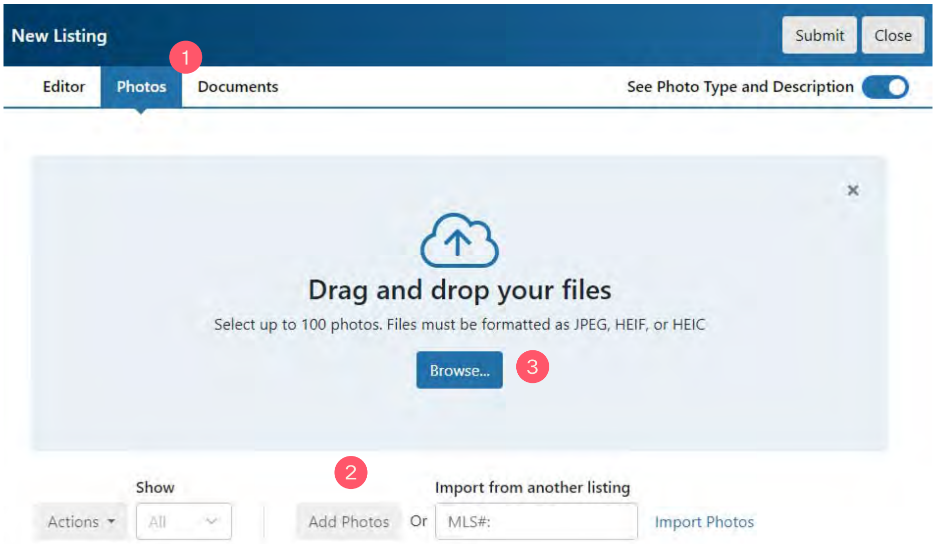
   NOTE: *select the Help icon to access any additional field requirements.*

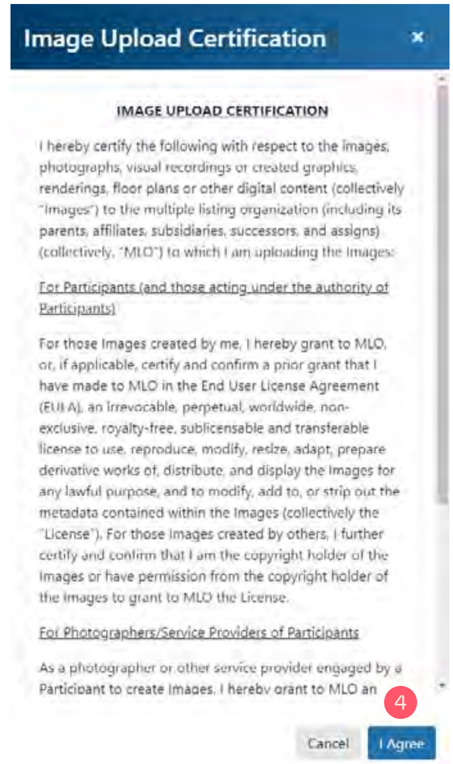
   5a. When the **Data source** switch is enabled, select fields (displaying the AI logo) will offer AI-generated data suggestions based on one or more uploaded images.

   NOTE: *Matrix™ system must be AI-enabled.*

   NOTE: *listing must have at least 1 uploaded photo.*

Photos (Add New)





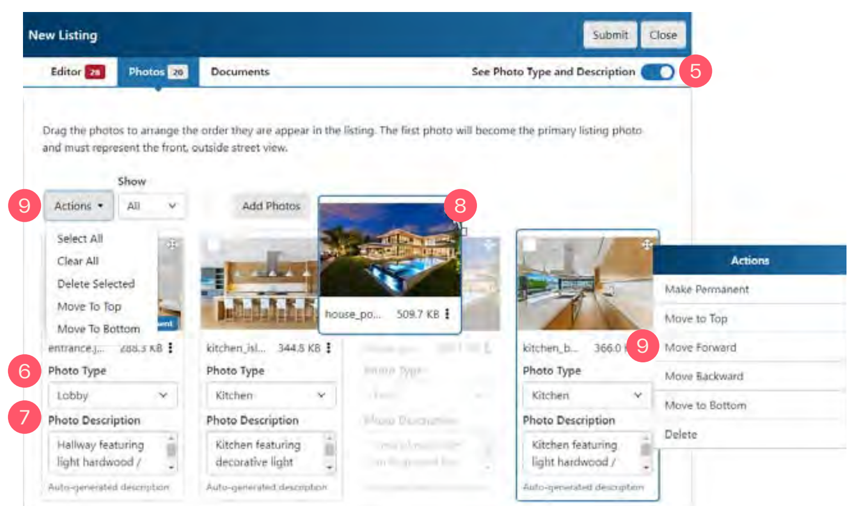
1. From the Listing page, select the "**Photos**" tab.
2. **Add** or **Import** the listing's photo(s).

   NOTE: *high-resolution photos are recommended and will, automatically, be resized.*
3. Select the "**Browse**" button to select photos from the hard drive on your device.

   NOTE: *users are also able to drag and drop photos directly from a folder.*
4. Agree to the **Image Upload Certification** terms.
5. Enabled, the "**See Photo Type and Description**" option to display and edit each photo's type and description.

   NOTE: *in some systems, these values may be auto-generated.*
6. Select a **Photo Type** to add this image to a specific photo category.

   NOTE: *assigning a Photo Type will allow users to view specific categories when browsing this listing's images.*



7. Add a **Photo Description** that highlights the key elements of an image.
8. Reposition a photo by either **dragging and dropping** it into the new position or by selecting the ellipses to access additional visibility options.

   NOTE: *select multiple photos and drag, in order, to move simultaneously.*

9. Select an individual photo or group photo **Action.**

Make Permanent: photo displayed with listing goes off market

Move To Top: moves photo to first position

Move Forward: moves photo forward one position

Move Backwards: moves photo backward one position

Move to Bottom: moves photo to last position

Delete: deletes photo

Select all: selects all photos

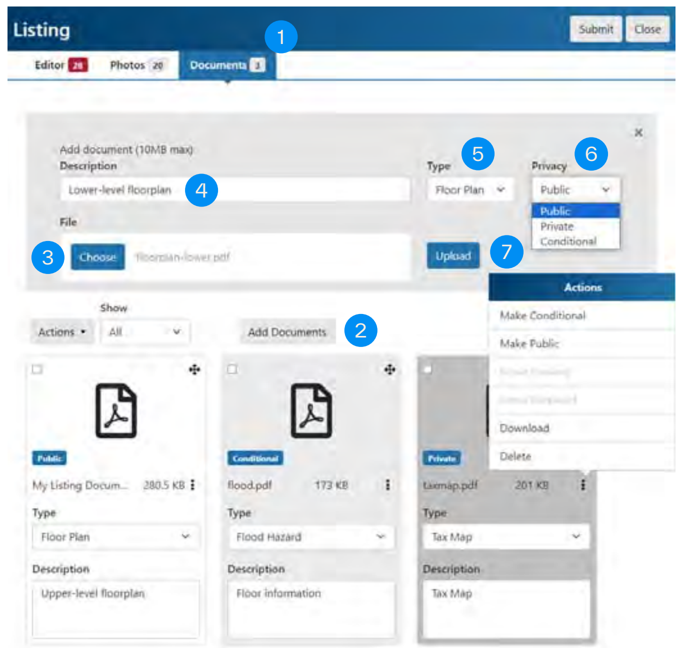
Clear all: clears all selections

Delete: delete all selected photos

Move to Top: moves selected photo(s), in order. to the first position

Move to Bottom: moves selected photo(s), in order, to the last position

Documents (Add New)



1. From the Listing page, select the "**Documents**" tab.
2. Select the "**Add Documents**" button.
3. **Choose** the document from your hard drive.
4. **Describe** the document.
5. Select which **type** of document this is.
6. Select this document's **privacy** setting (**NOTE:** *this feature may not be available on some systems).*

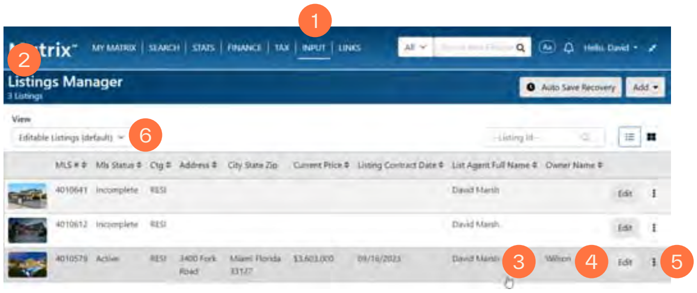
   Public: document is visible to everyone when on-market or off-market.

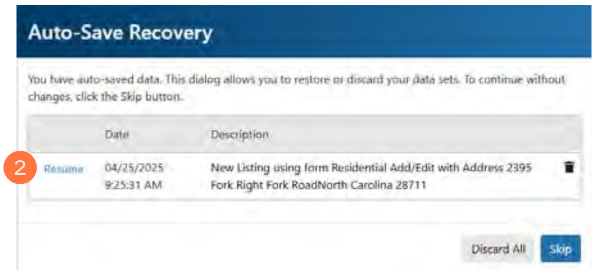
   Private: document is visible to authorized MLS users only.

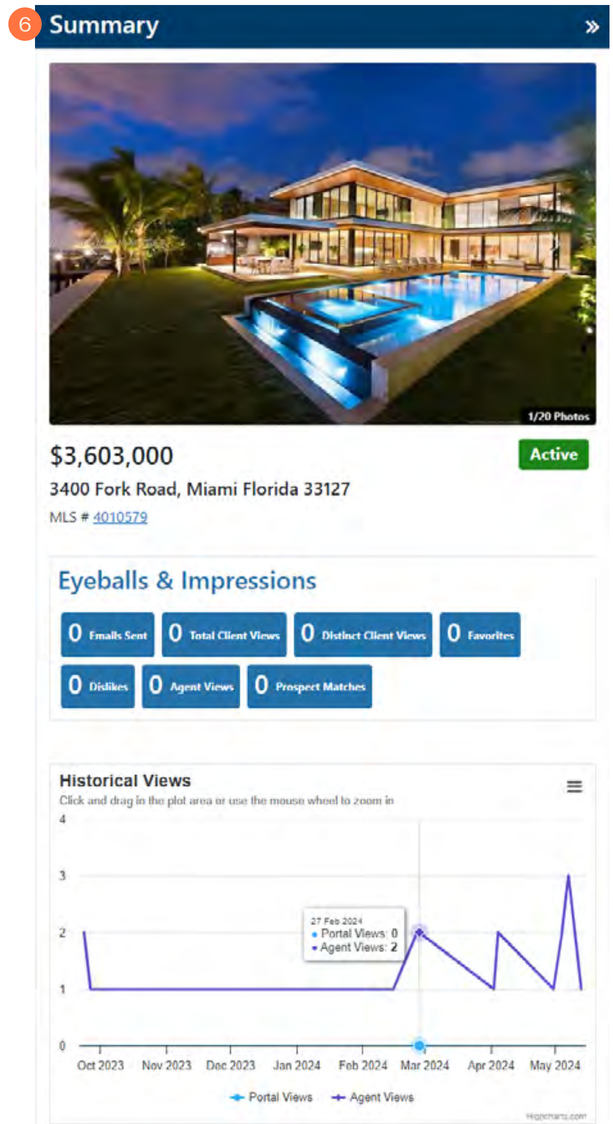
   Conditional: document is visible to everyone when on-market and automatically become private when off-market.
7. Select the "**Upload**" button to add this document.

NOTE: *select the ellipses icon ⋮ to access additional actions for an uploaded document.*

Manage Listings







1. From the Matrix™ navigation menu, select “**Input**” > “**Listing Manager**”.
2. Select the “**Auto Save Recovery**” button to access your collection of auto-saved listings.

   Resume: select the “Resume” link to return to the autosaved listing and continue from where you left off.

   Discard: select a specific listing’s “Discard” icon – or, the “Discard All” button - to discard any auto-saved changes to a listing and close the auto-save recovery screen.

   Skip: select the “Skip” button to close the auto-save recovery screen (the auto-save recovery screen will, once again, display after you next sign into Matrix™).

   NOTE: *Matrix™ automatically **saves new listings** after several minutes if:*
   a. no keyboard actions are detected
   b. you navigate away from the Input section

   NOTE: *the Auto-Save Recovery prompt will automatically appear on the Dashboard immediately after you next sign into Matrix™.*
3. Select the “**View**” dropdown list to access your collection of listings.
4. Enter a listing number to quickly **find** a specific listing within your collection.
5. Choose to view listings either in “**List View**” (default) or “**Gallery View**” mode.
6. Select anywhere on the listing’s row to display a **Summary** of listing details.
7. Select the “**Edit**” button to access the listing Editor.
8. Select the kebab icon ⋮ to access additional listing management **actions**.

Matrix™ Mobile

Matrix™ Mobile is designed as a light, versatile solution to quickly access the system's most essential functions.

NOTE: *custom settings from the desktop version of Matrix™ are automatically transferred to Matrix™ Mobile.*

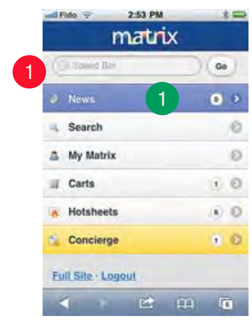
Use the following icons to navigate through the sections:

Home Page	Next Item
Last Page	Previous Item

1. To access Matrix™ Mobile, navigate to the Matrix™ Mobile **Login** page then enter your, "User ID" and "Password".

   NOTE: *select the, "Matrix™ Desktop" link to access additional Matrix™ features and functionality from the full version of Matrix™.*

Speed Bar



1. Enter **Speed Bar** shortcut criteria to quickly find listing, or roster, information from the Matrix™ database.

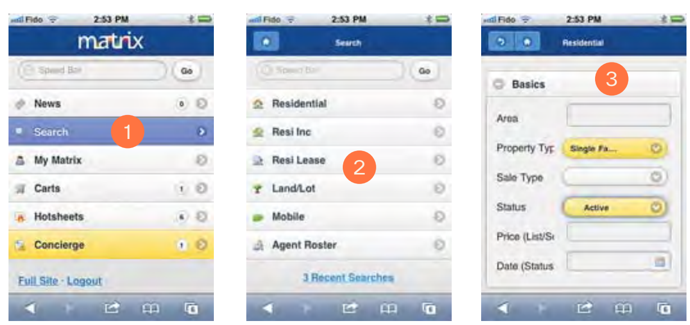
   NOTE: *shortcuts will automatically populate the Speed Bar following each search created from the, "Search" page.*

News

After your listing has been submitted live or saved as incomplete, you may add photos and/or supplements.

1. From the Home Page, select, "**News**" to view recently posted news items.

Search



1. From the Home Page, select, "**Search**" to enter search criteria for a variety of property types.

2. Select a **Property Type** to search.

   NOTE: *select the, "Recent Searches" link, at the bottom of the page, to view a list of your most recent searches.*

3. Enter your **Search Criteria**, scroll to the bottom of the page and select the, "Search" button.

   NOTE: *in the, "Area" textbox, enter an area name such as, "Los Angeles Southwest" (or its numeric equivalent, "C34"). To search multiple areas, simply separate values using a comma (i.e., "C34, 276" or, "Los Angeles Southwest, Highland").*

   NOTE: *select the, "Calendar" icon to add a date, or date range, to your search.*

   NOTE: *expand any panel with a, "Open" icon to enter additional Search Criteria.*

4. Select the, “**Email All**” link to send all listings to one, or more, recipients.

   NOTE: *separate email addresses, in the, “To” textbox, a comma.*

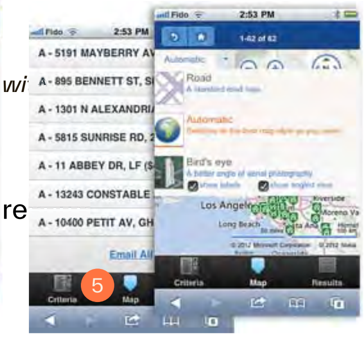
   NOTE: *enter a mandatory email subject line.*

5. Select the, “**Map**” icon link to view all listing on the map.

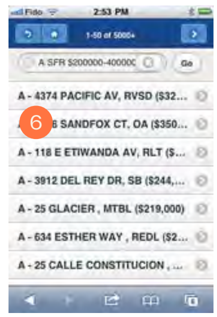
   NOTE: *by default, only results of less than 100 listings will display on the map.*

   NOTE: *on the map, select the, “down” arrow to reveal map display options.*

   NOTE: *on the map, select a listing pin to view the listing details.*



6. **Select a listing** to view the listing details and functions.

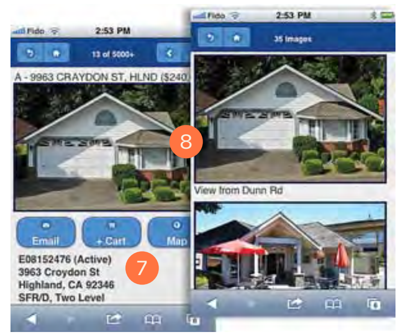


7. Select a **listing function.**

   Email: select the, “Email” button to email this listing to one, or more, recipients.

   Cart: select the, “Cart” button to add this listing to a cart.

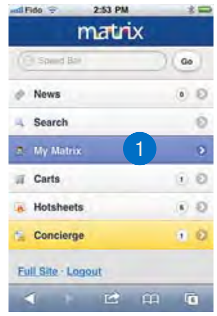
   Map: select the, “Map” button to view where the listing (identified by the large icon) is located on a map.



8. Select the primary, “**Listing Photo**” to display all listing images.

My Matrix™

1. From the Home Page, select, "**My Matrix™**" to access client information and settings.

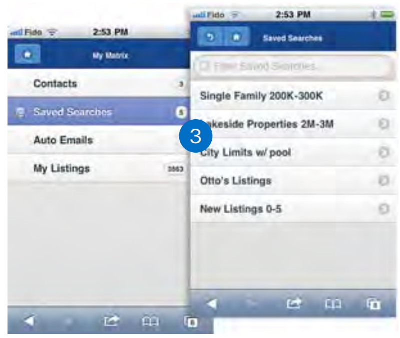


2. From the, "My Matrix™" page, select, "**Contacts**" to view a contact's details (including, saved "Auto Emails", "Saved Searches" and client portal preferences).

   NOTE: *from the, "Contacts" page, select the, "Add New" link to add a new contact.*

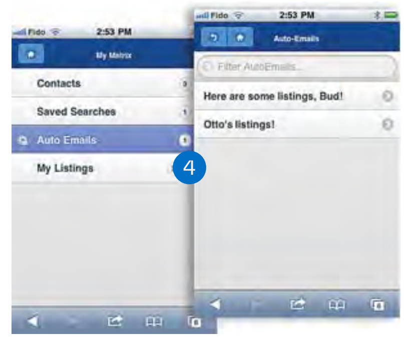
3. From the, "My Matrix™" page, select, "**Saved Searches**" to view any saved searches.

   NOTE: *select a saved search to view the results or change its criteria.*



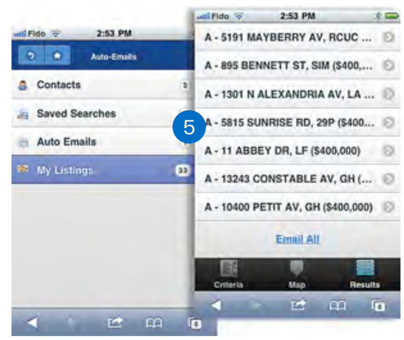
4. From the, "My Matrix™" page, select, "**Auto Emails**" to view the auto emails you have created.

   NOTE: *select an auto email to view the results, change the criteria or display the new listings since the last time you ran this search.*



5. From the, "My Matrix™" page, select, "**My Listings**" to view your listings.

   NOTE: *select a listing to view the listing details and functions.*



Carts

1. From the Home Page, select, "**Carts**" to view a list of all current carts.

   NOTE: *a cart is automatically created each time a new contact is added to the system.*

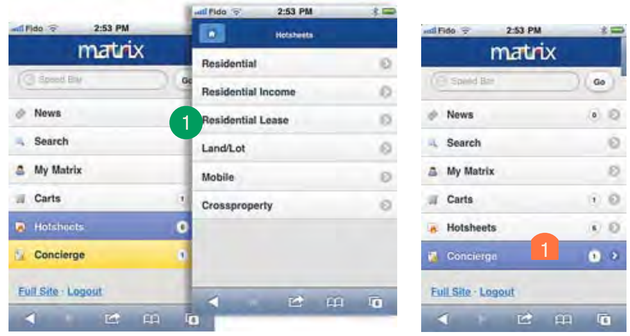
   NOTE: *see #7, under, "Search" in the Matrix™ Mobile section, to add a listing to a cart.*

Hotsheets

1. From the Home Page, select, “**Hotsheets**” to view the Hotsheet for each property type.

   NOTE: *a customized Hotsheet can only be created from within Matrix™.*

   NOTE: *see #3, under, “My Matrix™” in the Matrix™ Mobile section, to access a Hotsheet that you may have saved as a custom saved search.*



Concierge

1. From the Home Page, select, “**Concierge**” to view all auto emails with listings waiting for your approval.

   NOTE: *the concierge option, highlighted in yellow, will only appear if there are listings currently waiting for approval.*

2. Approve all listings in an Auto Email by selecting the, “**Approve All**” link or access listings to, “**Reject**” by selecting the, “[number of] listings” link (i.e., **13 listings**).

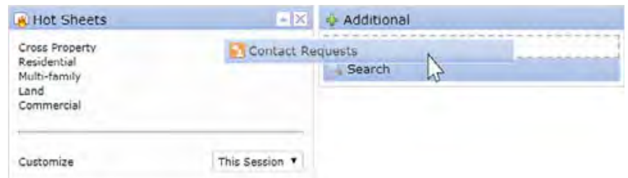
   NOTE: *to reject a specific listing, select the listing then select the, “Reject” button.*

   NOTE: *once all rejected listings have been discarded, select the, “Approve and Send All” link to send all remaining listings to your Auto Email recipient.*

Tips and Tricks

Home Panels

Prefer your Homepage Panels were organized differently?



- Select a Panel header then hold and drag it to a new position on the page.
- Select to close the Panel and to minimize it.

  NOTE: *all closed Panels can be found in the, "Additional" Panel.*

Market Watch

Looking for real-time changes in your Market?

- Select the, "Refresh" link to view up-to-date activity for the selected property type(s) during your chosen timeframe.

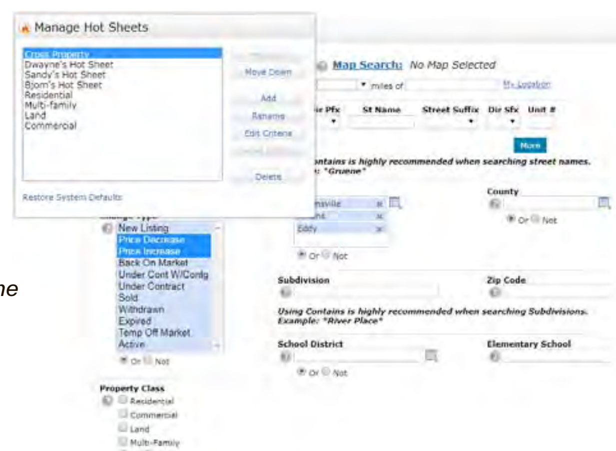
Not interested in displaying the activity for the entire system?

- Select the, "Customize" link to only show activity in the market that you specify for each Property Type.

  NOTE: *for more information, see, "Market Watch (Customize)" under, "Home Panels" in the, "My Matrix™" section.*

Hot Sheets

You have multiple customers who are each interested in different areas of your market. Would you like to see the activity in each of those areas separately?

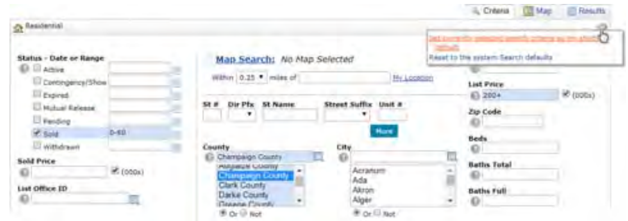


- Simply customize each Hot Sheet to only show the activity in a specific customer's area.

  NOTE: *for more information, see, "Hot Sheets (Customize)" under, "Home Panels" in the, "My Matrix™" section.*

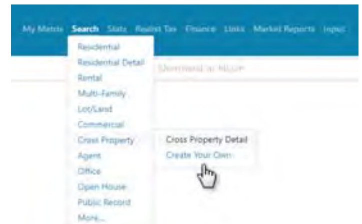
Criteria Search

Are you constantly having to add the same criteria to many of your searches?



Save commonly-used criteria as a default so that each time you use that search form, your saved criteria has already been entered.

Too many unused criteria fields cluttering up your Search Form?

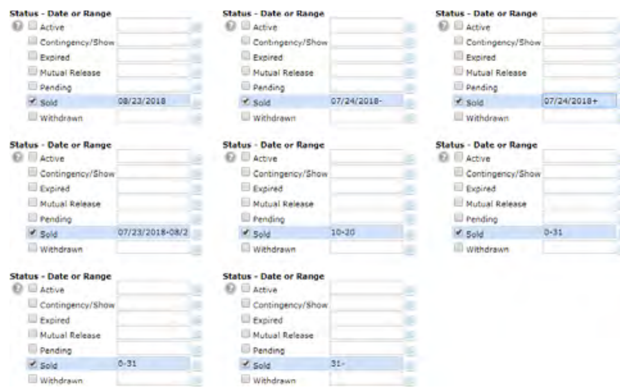


On systems where available, create your own custom Search form by adding only the Additional Fields that you typically use most often.

Want to quickly add a date, or date range, to your search?

Use the following date shortcuts to avoid using the calendar.

Specific date (MM/DD/YYYY): 08/23/2018 (August 23, 2018)
Before a specific date: 07/24/2018-
After a specific date: 07/24/2018+
Date Range (specific): 07/23/2018-08/23/2018 (July 23, 2018 to August 23, 2018)
Date Range (dynamic): 10-20 (between 10 and 20 days ago)
Last 31 days: 0-31 (0=today)
Last 31 days: 31+
Before the last 31 days: 31-



Want to enhance your text field searches?

Use a combination of any of the following symbols, in any text field, to enhance your Matrix™ searches.

Asterisk (*): a wildcard that can be used anywhere in the text

Public Remarks *pool* search field for anything **containing** the word, "pool" (what's before or after is irrelevant).

Public Remarks reduced* search field for anything **starting with**, "reduced" (what's after is irrelevant).

Public Remarks *deal. search field for anything **ending with**, "deal." (what's before is irrelevant).

Public Remarks reduced*deal. search field for anything **starting with**, "reduced" and ending with, "deal." (what's between is irrelevant).

Exclamation (!): used for exclusion

Public Remarks !*pool* search field for anything **not containing** the word, "pool" (any other words are acceptable).

Public Remarks !reduced* search field for anything **not starting with**, "reduced" (starting with any other words is acceptable).

Public Remarks !*deal. search field for anything **not ending with**, "deal." (ending with any other words is acceptable).

Question Mark (?): character substitute

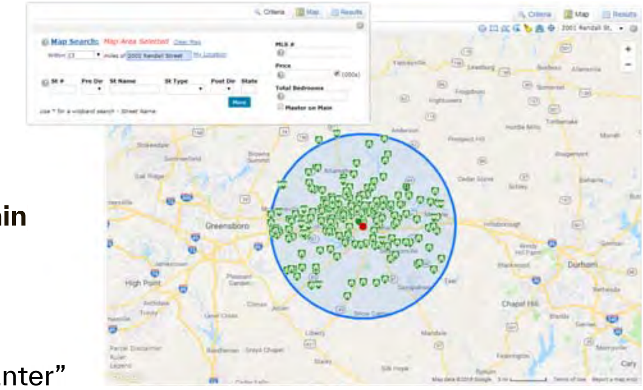
Public Remarks *gre?t* search field for anything **containing** a word with the letters, "gre?t" (where, "?" can be any letter).

Comma (,): used to combine

Public Remarks *pool*, !*pool ta search terms search field for anything **containing** the word, "pool" but **not containing** the word, "pool table".

Have a customer who's looking for property within a certain distance of a particular point-of-interest?

From a criteria form, enter a distance, and the POI address, to isolate all listings within the specified range.



Map Search

Have a customer who's looking for property within a certain distance of a particular point-of-interest?

From the map, enter the POI address in the, "Jump to address" textbox 

select, "Enter" then, starting near the location marker, use the radius tool to draw and isolate all listings within your preferred range.

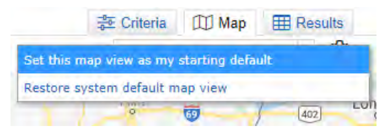
Need to determine the distance between 2 map locations?

Select the, "Ruler" link (bottom-left corner of map) then select on the first location while dragging your cursor to the second location. Release.

Tired of having to constantly reposition the map to an area that you typically search most often?

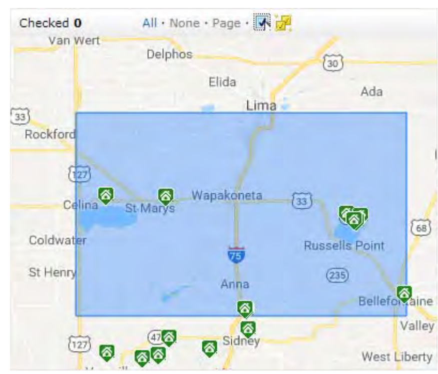
Replace the default map position by repositioning the map, selecting the, "Settings" icon then saving your current position as the new default.

Bonus Tip: use the, "Jump To Address" dropdown list to quickly navigate to system-preset areas of the map or back to your default position.



Do you have multiple properties to select on the map?

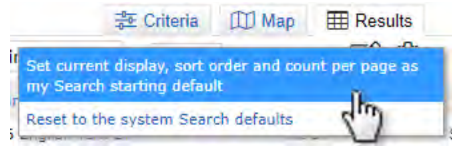
Save time by using, "Single Checkbox" icon to quickly select individual properties or the, "Multiple Checkbox" icon to select and drag over many properties at once.



Search Results

Want to use a different default display when generating search results?

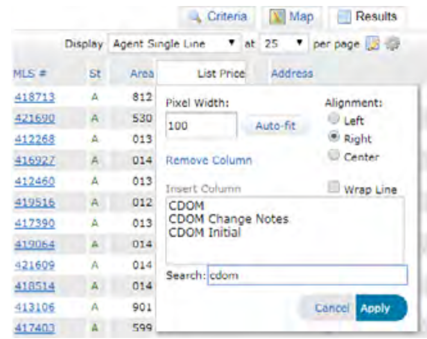
From the search results, choose your preferred Display from the dropdown list then select the, “Settings” icon to set it (plus the current sort order and, “per page” count) as your new default.



Do you, or your customer, only want to view certain information printed on your Agent Single Line?

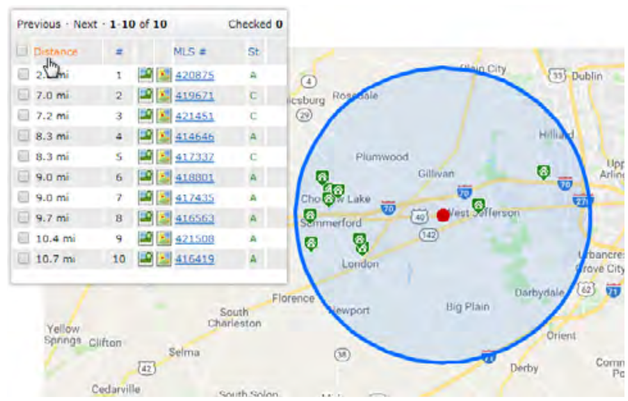
Customize a Grid by selecting on a column to insert additional fields or resize, reorder, rename and remove the existing ones.

Bonus Tip: for future use, name, and save, your Custom Grid by selecting the, “Manage Display” icon.



Want to sort results according to distance from a specific point-of-interest?

Use the map radius tool (or Criteria section’s POI textbox) to first isolate the listings within a set radius. Then, from the Single Line Results Grid, select the, “Distance” column header to sort how far a listing is located from the center of your radius.



Speed Bar

Looking to quickly create a simple search or change your current criteria on-the-fly?

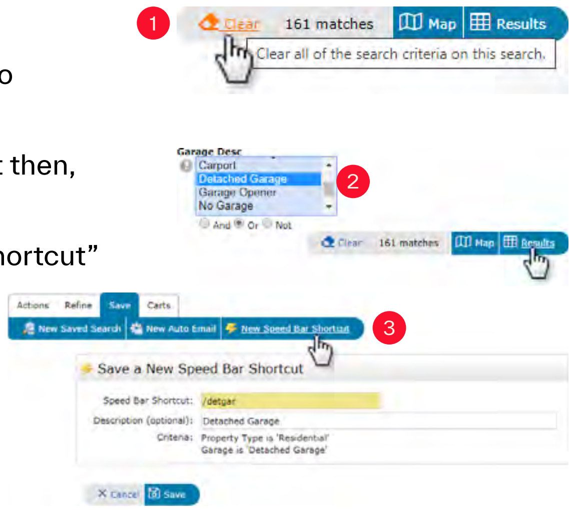
Use a combination of system, or custom, Speed Bar shortcuts to find results fast.

NOTE: *the following list of shortcuts represent the original Matrix™ defaults. Select the Speed Bar Help ? icon to view shortcut names that may be specific to your system.*

421010 420859 419783	**ML Numbers:** enter a single or multiple ML number(s)
A S	**Status:** enter "A" for, "Active", "S" for, "Sold" etc.
DET ATT COM LND MUL RNT LOT	**Property Type:** enter DET, ATT, COM, LND, MUL, RNT, LOT
123 Main Main 123 Ma*	**Street Number and Name:** for a specific address, enter the street number and the exact street name (without the street type). For a general street search, enter just the street name. Use the Wildcard (*) to search street names with unknown spelling.
Seattle	**City:** enter a city name
55555 A5A 5A5	**Zip Code (USA):** enter a 5 digit zip **Postal Code (CDN):** enter 3 characters + space + 3 characters
$650-900	**Price:** enter a price in thousands (represents current price for actives and sale price for solds)
2+ 3+ 2+ 3+ baths	**Bedrooms and Bathrooms:** when used together, bedrooms first then immediately followed by bathrooms. If only searching bedrooms, then no need to add bathrooms. If only searching bathrooms, then you must specify by adding, "baths".
1000-2000 sqft	**Approximate Square Feet:** enter a square footage (sqft)
2-4 acres	**Acres:** enter the number of acres (acres or ac)
oh 08/30/20118 oh 08/30/20118+ oh 0	**Open House:** enter a specific Open House date (oh 08/30/2018), an Open House date range (oh 08/30/2018+) or simply enter "oh 0" for all Open Houses today (0 means today).
agent john smith agent * smith agent j* sm*th	**Agent Search:** enter an Agent's first and last name (agent john smith). Use a Wildcard (*) to take the place of either the first or the last (agent * smith) or any unknown letters (agent j* sm*th)
res s x 2-4 3+ $400-550 1500+ sqft seattl	**Combine:** combine Speed Bar shortcuts in any order to create more complicated expressions. **NOTE:** each status must be grouped together **NOTE:** when used together, bedrooms must be placed before bathrooms

Want to do a Speed Bar search using a shortcut that doesn't yet exist?

Create your own custom Speed Bar shortcut in 3 easy steps:

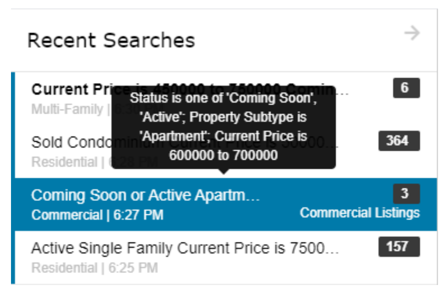


1. From any criteria form (or map), use the, "Clear" icon to clear everything.
2. Define what you would like to make a Speed Bar shortcut then, from the Button Bar, select, "Results".
3. From the Button Bar, select, "Save" > "New Speed Bar Shortcut" then name your Speed Bar shortcut (beginning with a forward slash (/) and no spaces).

NOTE: *use your custom Speed Bar shortcut as you would any system Speed Bar shortcut.*

Recent Search

Forgot to save an important search, but you don't see it on the, "Recent Search" dropdown list?

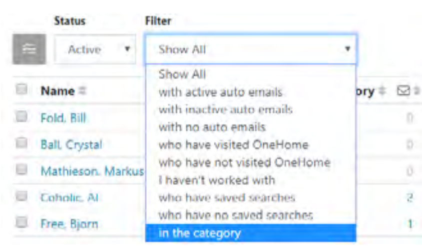


From the, "Recent Search" flyout section, select a previously run search to generate real-time results.

NOTE: *unused searches are automatically removed after 1 week.*

Contacts

Need to organize your contacts into specific groups?



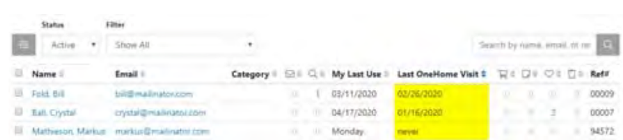
From your contacts, select to edit a specific contact then, from the category dropdown list, select a system category or add them to one of your own.

Use the, "filter" option to only show contacts belonging to that group.

Has a listing agent just run a Reverse Prospecting search and now contacted you with the reference number identifying one of your customers?

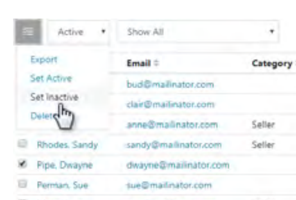
Find the contact fast by entering their reference number into the, "Search" box above your contact list.

Are your customers actually looking at the content you send?



Quickly view if—and when—a specific customer last visited their Portal under the, "Last Portal Visit" column then select the, "Portal Activity" section to view a breakdown of their most recent activity.

Want to clean up your contact list?



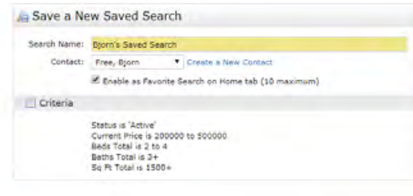
Hide inactive contacts by selecting a name from the list, then select the, "Set Inactive" button.

Select the, "Show Inactive" button to view or unhide names.

NOTE: *customers with enabled Auto Emails cannot be set to, "Inactive"*

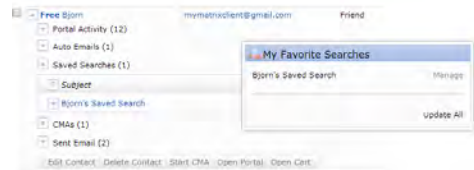
Saved Search

Tired of looking for a specific contact's saved search?



Organize saved searches better by associating each of them with a specific customer.

Then, when looking to run a saved search, find it quickly in a specific contact's management section. For a commonly used saved search, consider including it as one of your 10 Favorites in the, "My Favorite Searches" Panel on the Homepage.



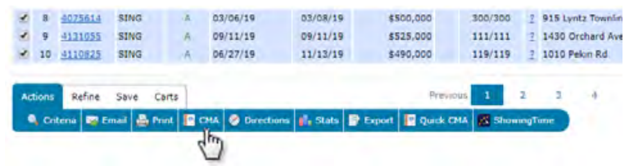
Want to quickly convert a Saved Search into an Auto Email?

From a Saved Search's Settings page, select the, "**Turn this Saved Search into an Auto Email**" link. Configure the Auto Email as required.

CMA

You've just run a search and found Comparables that you'd like to use in a CMA.

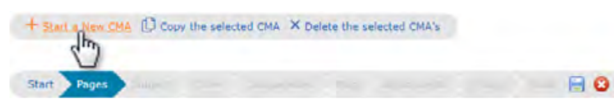
From the Button Bar, select, "CMA" to immediately pull all selected properties into a brand-new CMA.



Bonus Tip: to collect Comparables from multiple searches, select the, "Carts" tab on the Button Bar then, "Add to Cart" to add the selected properties to a specific contact's Cart. When you're ready to create a CMA, select the Comparables step of the CMA Wizard, then, from the Button Bar, select the, "Add from Cart" button to load the selected properties.

Want to create a collection of CMA templates to use with different groups of clients?

Start a new CMA, then, from the, "Start" step of the CMA Wizard, name your template accordingly in the, "Description" box (i.e. Template #1).



From the, "Pages" step, select which pages you'd like to add as well as any other steps to include that define this template. Select the, "Save" icon.

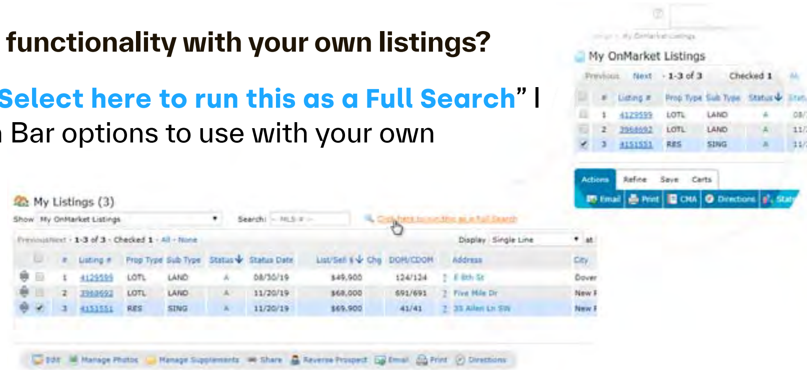
Repeat for each new template.

When generating a new CMA for a customer, simply select any template from the available CMA's then select the, "Copy the selected CMA" button to duplicate. Open the copied CMA and, from the, "Start" step of the CMA Wizard, select a contact's name then rename your CMA in the description. Continue building this CMA without affecting the original template.

My Listings

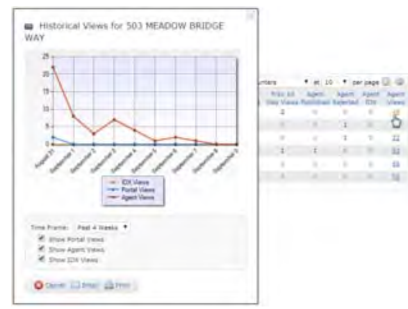
Want to include the same Results Button Bar functionality with your own listings?

From the, “My Listings” page, select the, “**Select here to run this as a Full Search**” to view all available Search Results Button Bar options to use with your own listings.



Want to know how many hits your listing has received since, perhaps, a recent price decrease?

From the, “My Listings” section select, “My Hit Counters” from the dropdown list then select an associated value link to see the activity during the specified time period.



Settings

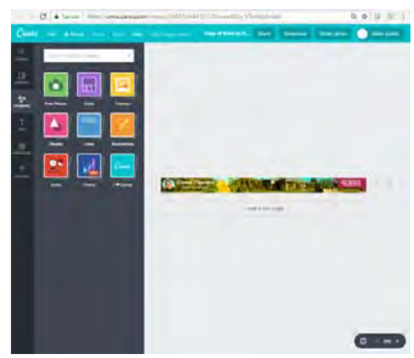
My Information

Looking for an easy way to create your own custom branding for free?

Use www.canva.com to create stunning banners (and more).

It’s as simple as building an image in Canva, saving it to your computer then uploading it to Matrix™.

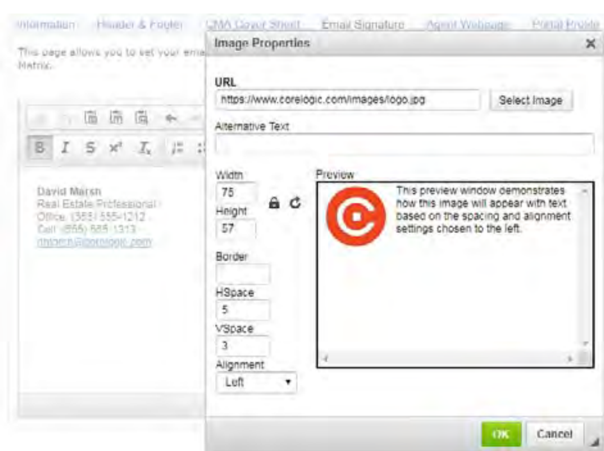
NOTE: *Cotality is not affiliated with Canva.*



Email Signature

Want to include an image, from the web, in your email signature?

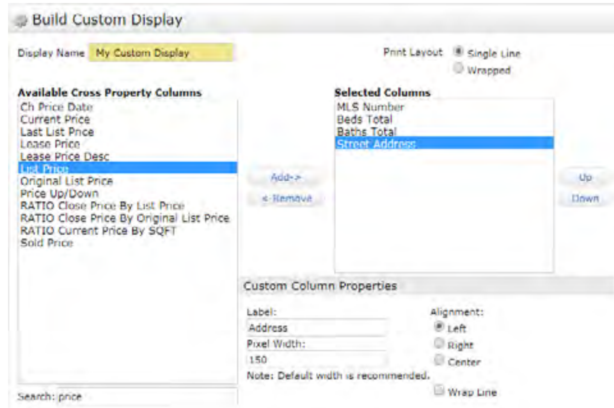
From the, “Email Signature” tab of the, “My Information” section, select the, “Image” icon to add the url of the image stored elsewhere on the web.



Custom Displays

Want to quickly build a custom Single Line Grid Display?

Rather than add, remove and re-order Grid columns one-at-a-time within the grid itself, why not manage multiple fields together by choosing to customize your Grid from the, “Custom Display” feature found in the, “Settings” section.

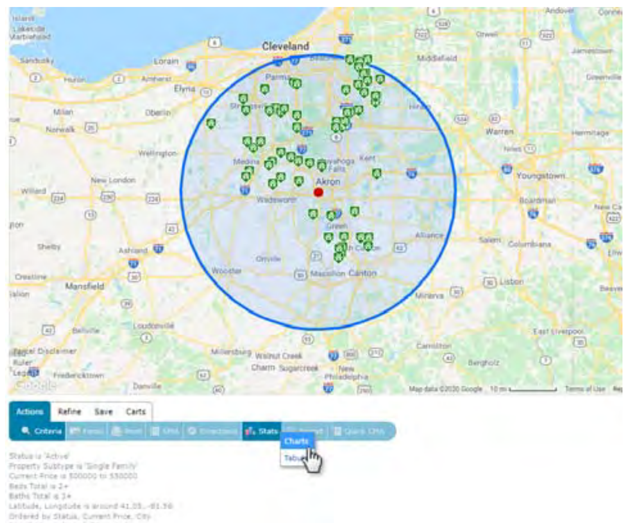


Stats

You’ve just generated some results and would now like to see some statistics based on the same criteria you used in the search.

Rather than selecting the, “Stats” tab and having to retype your criteria all over again, simply select the, “Stats” button from the Results Button Bar then select, “Charts” to pre-populate the Stats feature with your original criteria.

NOTE: *there must not be any properties selected to use this feature.*

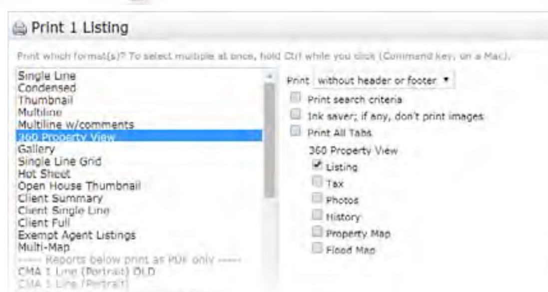


Button Bar

Actions > Print

Tired of wasting ink?

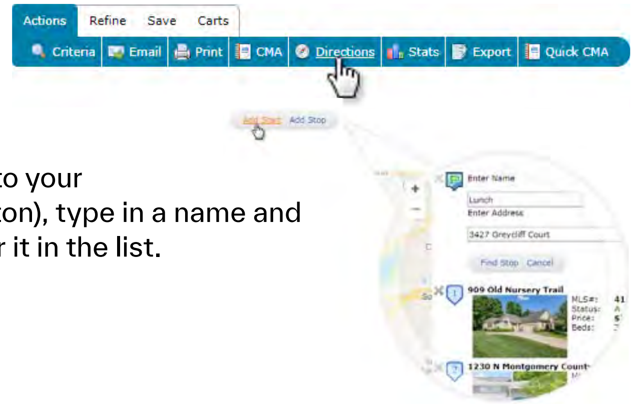
Select the, “ink saver” option to remove images from print or select whether to include branding on your printed material. Finally, when printing Full Displays with tabs, select only the tab(s) that you’d like to see printed.



Actions > CMA

See, “CMA” in the Tips and Tricks section of this Guide.

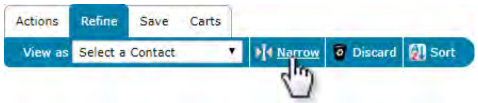
Actions > Directions



Want to include a scheduled stop for lunch or, perhaps, another event during your driving tour?

From the Driving Directons page, add custom locations to your journey by selecting the, "Add Start" (or, "Add Stop" button), type in a name and address then select and drag the new location to reorder it in the list.

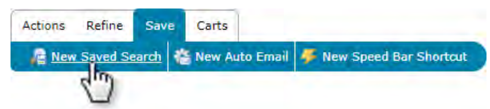
Refine > Narrow



Did you just narrow your search results but now want to return to the original list?

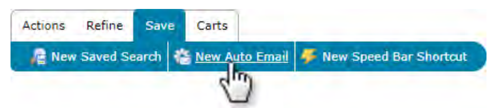
Simply select the original search name in the breadcrumb located above your results.

Save > New Saved Search



See, "Saved Search" in the Tips and Tricks section of this Guide.

Save > New Auto Email



Want to send your customer additional property information that may not be included in one of the Portal's default Displays?

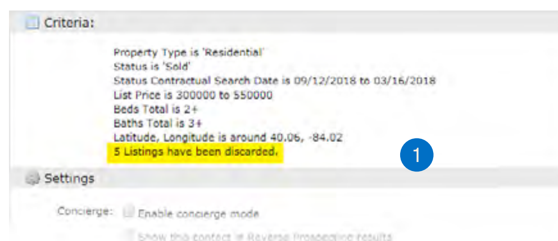
See, "Button Bar > Actions > Email" in the Tips and Tricks section of this Guide.

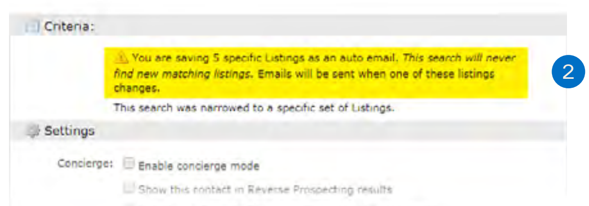
Need to remove specific properties from being sent in an Auto Email...but don't want to enable Concierge?

First, generate a search then select the listings that you'd like to filter.

1. To remove the selected listings from ever being sent with this Auto Email in the future, select, "Refine" on the Button Bar, then select, "Discard". With the listings now removed, select the, "Save" tab then select, "New Auto Email. Configure as desired.

2. To send future Auto Email updates on just the selected listings, select, "Refine" on the Button Bar, then select, "Narrow". With only the narrowed listings remaining, select the, "Save" tab then select, "New Auto Email. Configure as desired.

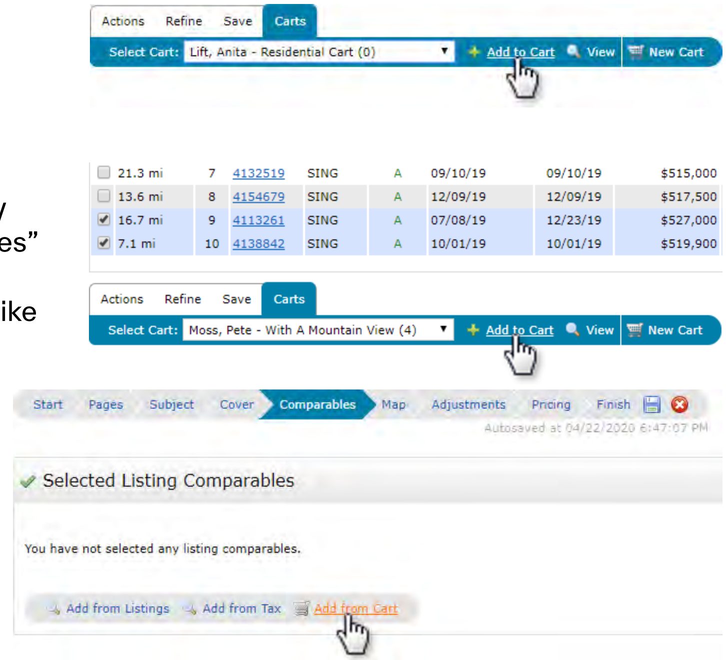




Carts > Add to Cart

Want to add CMA Comparables from multiple searches?

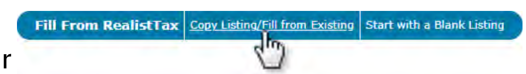
Add selected properties from each Comparables search into a customer's Cart. When you're finally ready to create their CMA, from the, "Comparables" step of the CMA Wizard, select the, "Add from Cart" button and choose which properties you'd like to use.



Input (Add/Edit)

Are you listing a property that's similar—or the same—as one you've listed before?

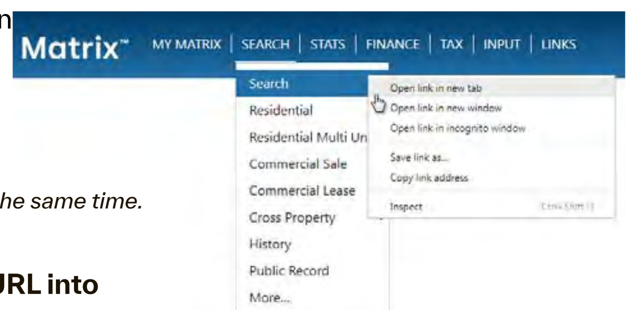
From the Input section, select the, "Fill from" option to pre-populate the Input form with many of the same fields used in your previous listing.



Multiple Tabs

Want to run multiple searches at once while, perhaps, building a CMA at the same time?

Though not officially supported by Matrix™, most modern browsers allow users to right select and open a link in a new tab or window. To multitask in Matrix™, right-select any of the Matrix™ menu items then select to open that page in a new window or tab.



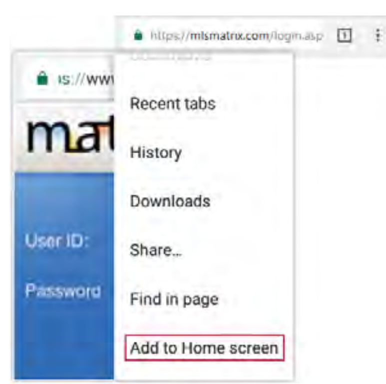
NOTE: *you cannot input multiple listings, in multiple tabs/windows, at the same time. Only add 1 listing at a time.*

Tired of having to constantly type the Matrix™ login page URL into your smartphone?

Why not add a Matrix™ quick-launch icon to your mobile device's home screen.

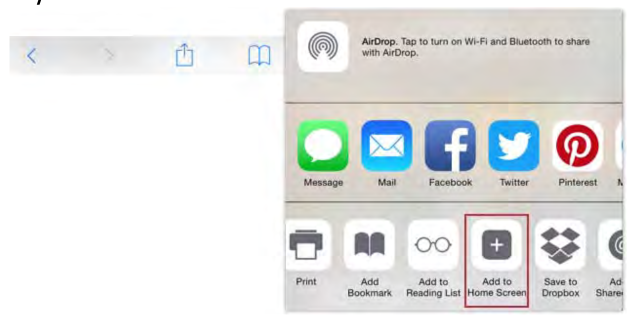
Android

1. From your device, open the Chrome browser and navigate to your Matrix™ login page.
2. Tap on the three dots ⋮ in the upper-right corner. This will open a menu. In this menu, select the "Add to Home screen" option.
3. Name your shortcut (i.e. Matrix™ Login).
4. Select, "Add".



iPhone

1. From your device, open the Safari browser and navigate to your Matrix™ login page.
2. Tap the “share” button on your browser’s toolbar. This will open a menu. In this menu, select the “Add to Home screen” option.
3. Name your shortcut (i.e. Matrix™ Login).
4. Select, “Add”.



Quick Start Guide

Classic Matrix™

Contents

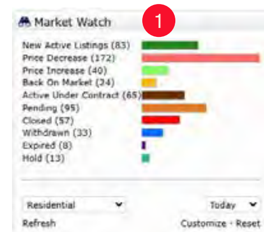
Classic Matrix™

Market Watch (Customize) 1
Hot Sheets (Customize) 1
CMA (Add/Edit) 2
CMA (Import Properties) 5
Search 6
Criteria Search 6
Map Search 7
Map Layers 8
Search Displays 10
Speed Bar Search (Classic) 12
Speed Bar Shortcut (Create) 13
Speed Bar Shortcut (Use) 13
Recent Search 13
INRIX Drive Time™ 14
Auto Email 14
Auto Email (Create) 14
Concierge Mode 16
Button Bar 16
Button Bar 16
Actions 17
Refine 17
Save 17
Carts 17
Input 18
Listing (Add New) 18
Photos and Supplements (Add New) 19
Listing (Edit Existing) 20
Auto Save 20

Classic Matrix™

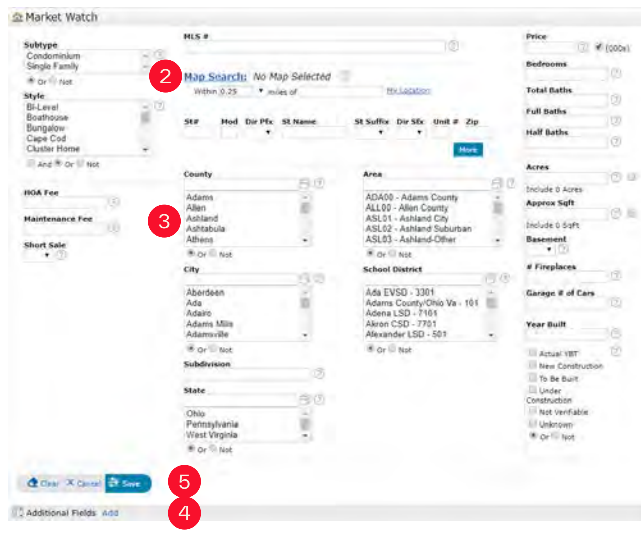
This section offers user-guidance on how to access—and utilize—Matrix™'s classic features.

Market Watch (Customize)



1. From the My Matrix™ Page, select, "**Customize**" on the, "Market Watch" Panel.
2. Select the, "**Map Search**" link and use the map shape tools to select specific areas to watch (optional).

   NOTE: *you may also select a general location from any of the controls below the Map link.*

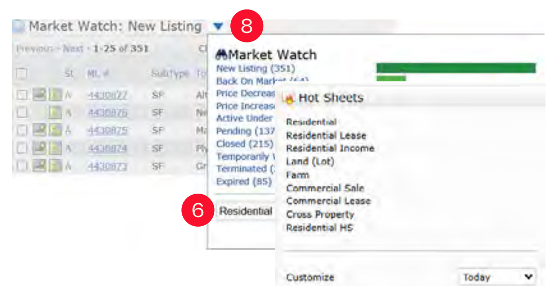


3. Enter the specific **criteria** that you would like to include as part of your customized search.

   NOTE: *for more information, see, "Criteria Search" in the, "Search" section.*

4. Add/Remove **Additional Fields** (optional).
5. Select, "**Save**" on the Button Bar.
6. Select a **property type** from the dropdown list.
7. Select a **time frame** from the dropdown list.
8. Select a **status** link to view listings that now meet your new, custom Market Watch search criteria.

   NOTE: *to run another Market Watch search without having to return to the Homepage, select the dropdown arrow, on the, "Results" page, to display your Market Watch options.*



Hot Sheets (Customize)

1. From the homepage, select the **Settings** icon on the "Hot Sheets" Panel.
2. Select a Hot Sheet to **manage**.

   2a. Select the "**Add**" link to create a new Hot Sheet.

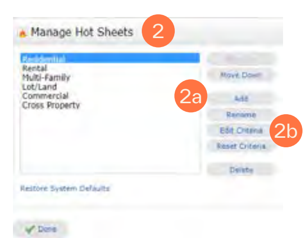
   NOTE: *select a Property Type from the dropdown list then name your new Hot Sheet and select, "Save".*

   NOTE: *you may customize a maximum of 10 (default) Hot Sheets.*

   2b. Select the "**Edit Criteria**" link to edit an existing Hot Sheet.

   NOTE: *Enter the specific criteria that you would like to include as part of your customized search then select, "Save".*

   NOTE: *for more information, see "Criteria Search" in the "Search" section.*



3 Select a **time frame** to use for your Hot Sheet.

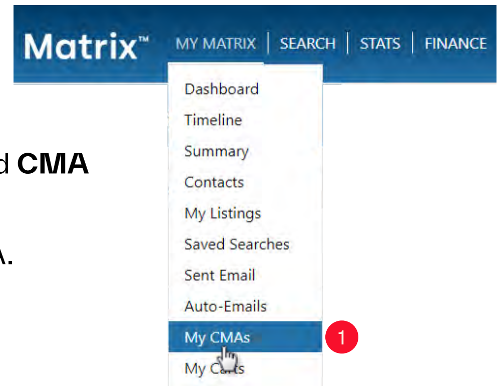
New Only: only shows listings which are new/changed since the last time the user ran the Hot Sheet. For example: if a user logs in at 9:00am and runs the Hot Sheet, then later within that same sessions runs it again, this option would show only listings new/changed since 9:00am.

This Session: only shows listings which are new/changed since the last time the user ran the Hot Sheet in a prior session. For example, if a user logs in at 9:00am 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 new/changed since 9:00am.

24 Hour, Today, 3 Days, 7 Days: only shows listings which are new/changed during the specified time frame.

Custom: allows the user to run a Hot Sheet using a custom date (within the last 30 days of the current date), or a time range.

CMA (Add/Edit)



1 From the Matrix™ navigation menu, hover, "**My Matrix™**" and select, "**My CMAs**".

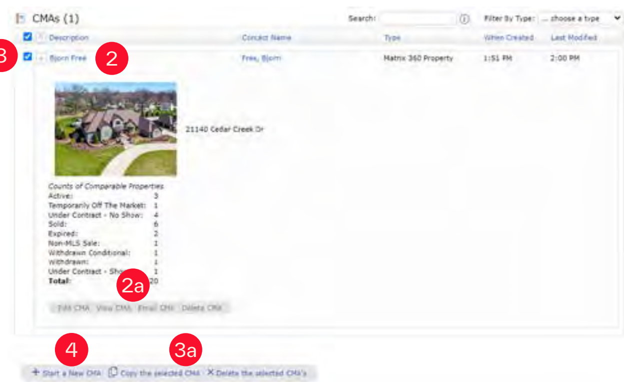
2 From the, "Description" column, select an arrow—or, the associated **CMA name**—to manage this CMA.

2a **Edit CMA:** access the step-by-step CMA Wizard for this CMA.

View CMA: generate a .pdf of this CMA.

Email CMA: send this CMA, via email, to one or more contacts.

Delete CMA: permanently delete this CMA.



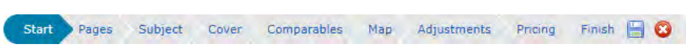
3 Select a CMA.

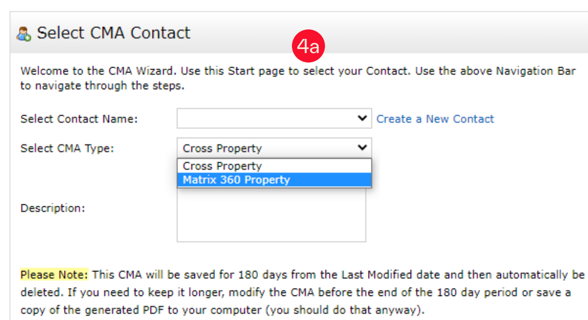
3a **Copy the selected CMA:** create a CMA template, of the selected CMA, to use as a starting point when creating future CMA's.

Delete the selected CMA's: permanently delete the selected one, or more, CMA's.

4 **Start a New CMA:** access the step-by-step CMA Wizard.

4a Select **Start** (default position) to select a CMA Contact.





NOTE: *add an optional description in the textbox provided (description will not be visible on the final CMA).*

i **Select Contact Name:** select who this CMA is being created for.

ii Select CMA Type

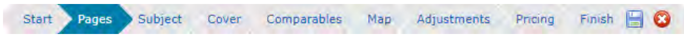
Cross Property: create a CMA using MLS-listed properties.

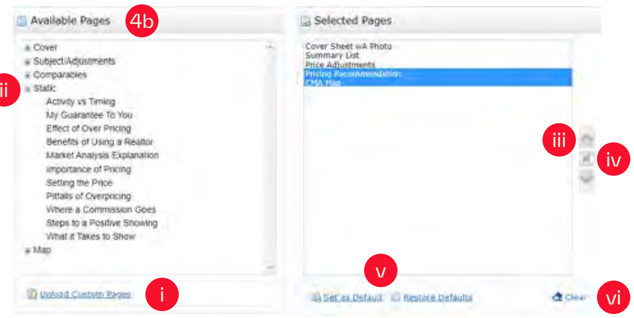
Matrix™ 360 Property: create a CMA using MLS-listed properties or properties pulled from the public records.

iii **Description:** describe this CMA (optional).

NOTE: *this description is not included within the CMA document.*

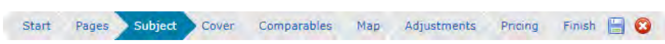
4b Select **Pages** to select from the, “Available Pages” to include in the CMA .



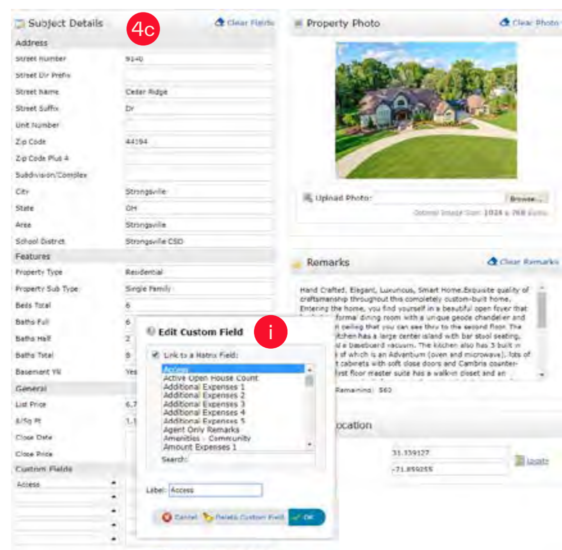


- i **Custom Pages:** add Custom Pages (.pdf only) to your CMA by selecting the, “Upload Custom Pages” link located below the, “Available Pages” listbox. By default, you are limited to 5 “My Custom Pages”—each with a maximum file size of 250KB. Only letter size content can be properly accommodated (landscape or portrait).
- ii **Available Pages:** select the, “Expand” icon next to a category to reveal the available pages. Alternatively, select the, “Collapse” icon to hide the available pages.
- iii **Reorder Selected Page(s):** in the, “Selected Pages” listbox, select a page, or multiple pages (while pressing the CTRL key), and use the, “Up” and, “Down” icons to reorder page(s) as they will appear in the final CMA.
- iv **Delete Selected Page(s):** in the, “Selected Pages” listbox, select a page, or multiple pages (while pressing the CTRL key), and use the, “Delete” icon to remove page(s) from the final CMA.
- v **Set as Default:** set the selected pages as your starting default for all future CMA’s. To restore default pages after removing or reordering pages, simply select the, “Restore Defaults” link.
- vi **Clear:** remove all pages from the, “Selected Pages” listbox.

4c Select **Subject** to fill Subject Property details from a blank form, a listing number or by searching for a listing.



NOTE: *to fill from a property that has not previously been listed on the MLS, you must ensure that the, “Non-MLS Sale” status has been selected on the search form.*



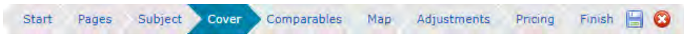
- i **Custom Fields:** add additional field(s) to the Subject Property.

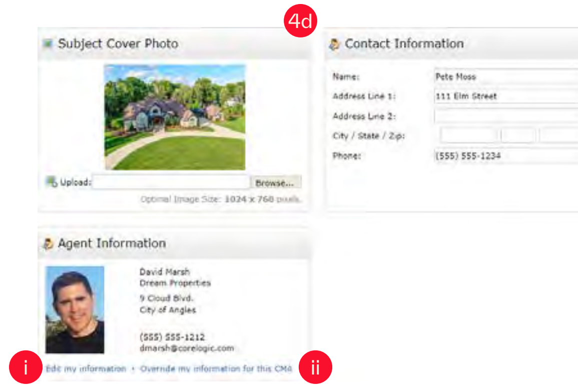
  NOTE: *from the, “Edit Custom Field” pop-up, either manually type in a label name or select the, “Link to a Matrix™ Field” check box and the label will automatically be added with any stored value.*

  NOTE: *select the, “Save Custom Fields as Default” link to include your Custom Fields in future CMA Subject Properties.*

  NOTE: *your custom fields also appear in the Adjustments step of the CMA Wizard.*

4d Select **Cover** to add your contact information, subject photo, agent information and agent logo to the CMA cover.





i Select the, "**Edit my information**" link to update your Agent information as it should appear in all CMA's.

ii Select the, "**Override my information for this CMA**" link to update your Agent information for just this CMA.

4e Select **Comparables** to add comparables from a search or from a cart.

NOTE: *Comparable properties can also be imported into this step of the CMA Wizard. For more information, see, "Actions > CMA" in the, "Button Bar" section.*

NOTE: *on the Single Line Display, select the, "Distance" heading to order the Comparables, by distance, from the Subject property.*

NOTE: *highlighted line represents the Subject Property.*

i **Remove Selected:** remove selected listing(s) from comparables.

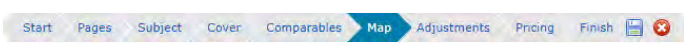
Add from Listings: run a property search to find additional comparables.

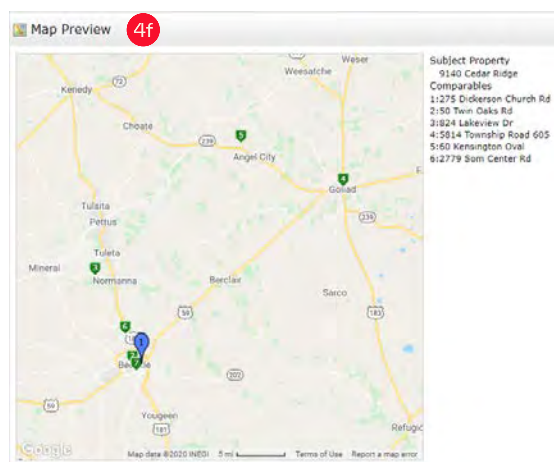
Add from Tax: run a tax search to find additional comparables.

Add from Cart: add additional comparables from any client's cart.

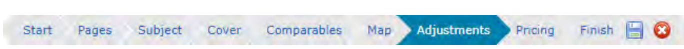
Print: print selected listing(s) in a variety of layout options.

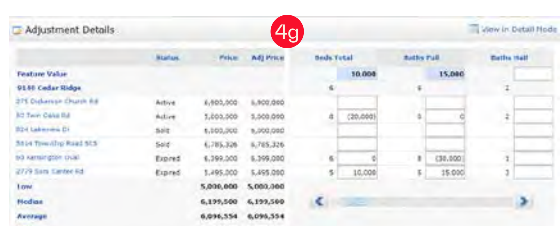
4f Select **Map** to include a map that displays the location of comparables in relation to the subject property.





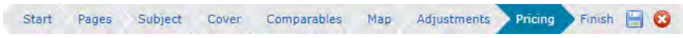
4g Select **Adjustments** to adjust a comparable's feature value.





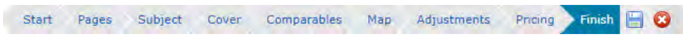
i Insert a Subject Property's feature value into its associated textbox and Matrix™ will automatically calculate how much to adjust each Comparable based on how many of the same feature it has.

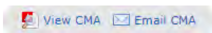
4h Select **Pricing** to view a Summary of Comparable Prices and Adjusted Comparable Prices.

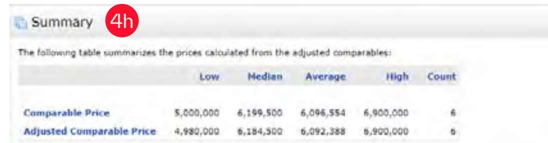


NOTE: *include a note and/or suggested price based on the low, median, average and high comparable values provided (both optional).*

4i Select **Finish** to view a, "CMA Summary" and to generate—or email— a .pdf of your completed CMA.







CMA (Import Properties)

1 From any search result, select a listing number—or, Property ID—to open the associated **Agent Full Display**.

NOTE: *this selected property will be used as the Subject Property in the CMA.*

2 Select the, "**View Comparable Properties**" button.

3 **Comparables Report:** generate or send a Quick CMA Report.

Subject Property: the Subject Property's address

Selected Pages: select the arrow to add/remove pages to/from this Quick CMA Report

Back to Results: return to original search results

Create CMA: import this Subject Property and Comparables into the CMA Wizard

Email: send contacts a link to the Quick CMA Report .pdf

View Report: open the Quick CMA Report as a .pdf

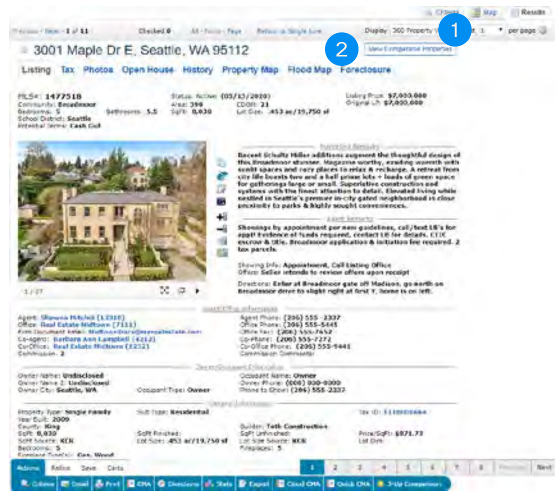
4 **Summary:** view a quick summary of relevant Comparable features.

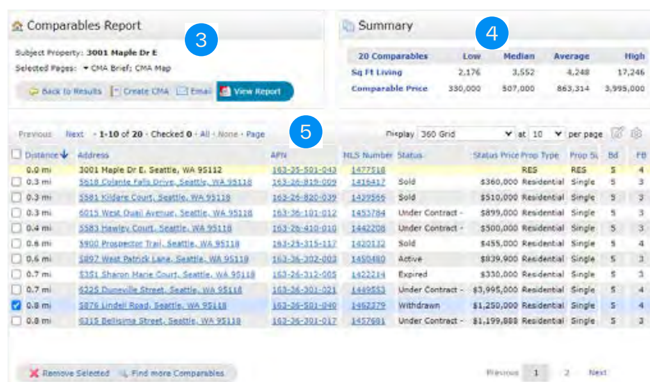
5 Comparable Results: a collection of auto—and, manually—selected Comparable properties.

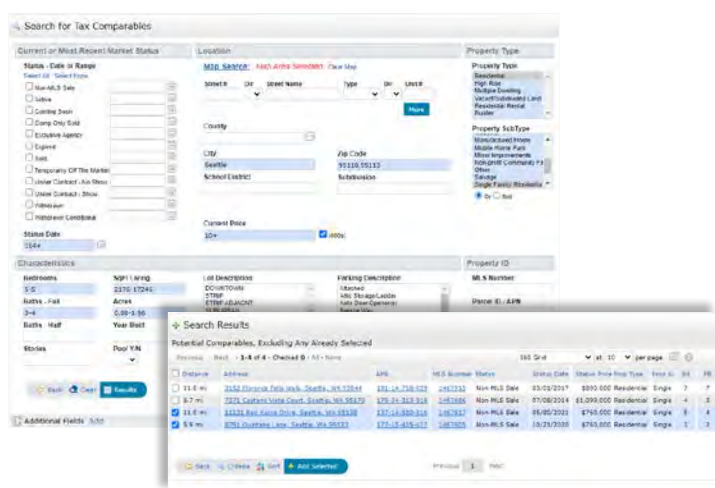
NOTE: *Matrix™ uses an algorithm to automatically generates a list of 20 Comparables properties.*

Remove Selected: removes the selected Comparable property(s) from the list

Find more Comparables: search for additional Comparable properties to add to the list

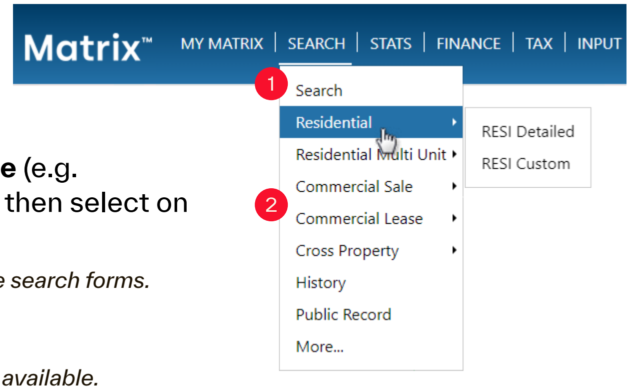






Search

Criteria Search



1. From the Matrix™ navigation menu, hover the **Search Option**.

2. From the dropdown list, select the desired **Property Type** (e.g. Residential, Commercial, Land, Tax, Cross Property etc.) then select on the link for the type of search to run.

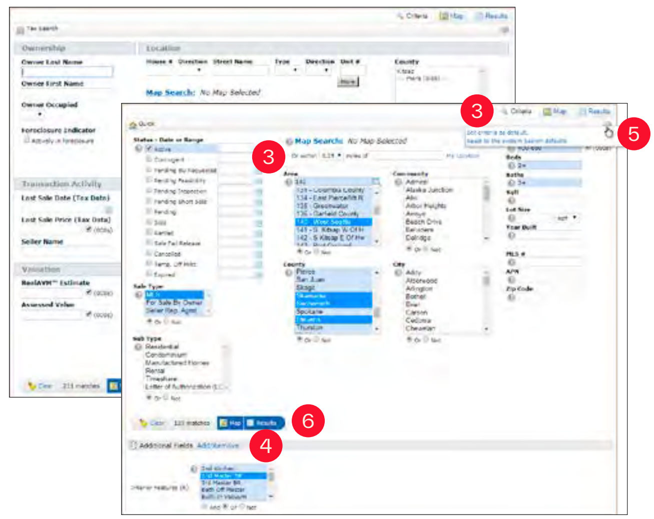
   NOTE: *selecting on the Search Option displays a page with all available search forms.*

3. From the **Criteria tab**, enter your search criteria.

   NOTE: *enter price in thousands of dollars if checkbox is selected or not available.*

   NOTE: *select multiple listbox options by selecting an item while holding down the, CTRL (Windows) or Control (Mac) key.*

   NOTE: *select the, "And" radio button for results that contain all of the selected item(s).*
   select the default, "Or" radio button for results that contain any of the selected item(s).
   select the, "Not" radio button for results that contain none of the selected item(s).



   3a. Select the, "Map Search" link (Map Search:) or select the Map tab to include/exclude specific map areas to your search.

   NOTE: *manually enter a distance or use the pre-set options to isolate all properties within a specific radius.*

   NOTE: *for more information, see, "Map Search" under the, "Search" section.*

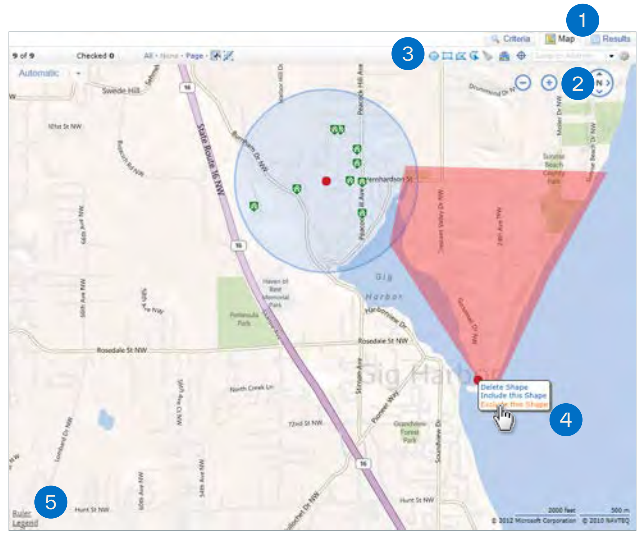
4. Add/remove additional fields that did not initially appear on the form.

5. Select the, "**Settings**" icon to save the current criteria as the default each time this search form is used.

6. Select, "Search" on the **Button Bar**.

   NOTE: *for more information, see the, "Button Bar" section for a full list of Button Bar functionality.*

Map Search



1. Select the **Map** tab.

2. Select and drag the map or **zoom in and out** to your desired location.

   NOTE: *Use the, "Jump to Address" dropdown list* Jump to Address *to quickly locate a specific map area.*

   NOTE: *if your search criteria generates between 500 and 5000 results, select on a map cluster to display the (indicated number of) listings for that area.*

3. Using one, or a combination of all **four shape tools** (Radius, Rectangle, Polygon and Freehand), draw a shape to isolate multiple areas on the map.

   NOTE: *be sure you have added search criteria in the Criteria section.*

   NOTE: *If the number of results exceeds the maximum number of listings allowed to display (at this time, 500) then you may have to zoom in on the map or narrow your search criteria.*

   NOTE: *during radius sizing, shape automatically displays distance from its center to the edge.*

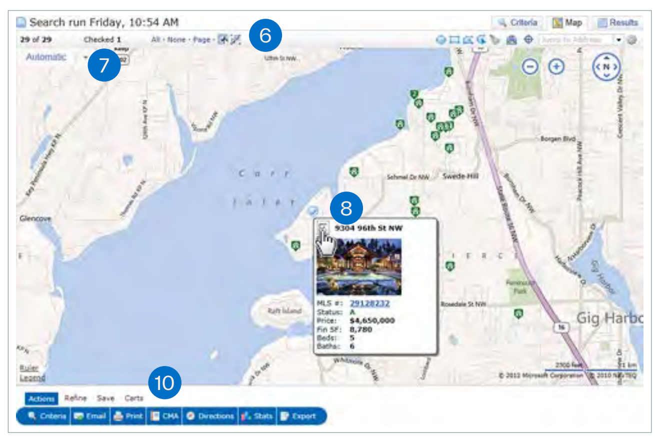
   NOTE: *clear all shapes by selecting the, "Clear All Shapes" icon .*

4. When all areas on the map have been selected, you may choose to **Delete**, **Include** or **Exclude** any area simply by hovering over the shapes red dot.

   NOTE: *overlap two shapes then hover either red dot > Exclude this Shape to also exclude the area where the two shapes intercept.*

   NOTE: *reposition a shape by selecting its red dot and dragging it to the new location.*

5. Select the **Ruler** link, then select any two points on the map to measure the distance between them.



6. Select/de-select multiple properties.

   All · None · Page ·

   NOTE: *"All" selects all listings on the map whether visible in the viewport or not.*

   NOTE: *"None" deselects al selected map properties.*

   NOTE: *"Page" selects only map properties visible in the viewport.*

   NOTE: *selecting the, "Single Checkbox" icon allows you to select properties, one-by-one. Selecting the, "Single Checkbox" icon again turns this feature off.*

   NOTE: *selecting the, "Multiple Checkbox" icon allows you to select multiple properties by selecting and dragging your cursor over the desired properties. This feature automatically turns off when the properties have been selected.*

7. Choose from either a **Road view** or **Bird's eye view.**

8. View partial listing details by selecting on any **marker**.

   NOTE: *from inside the map marker pop-up, select the MLS# to view the 360 Display.*

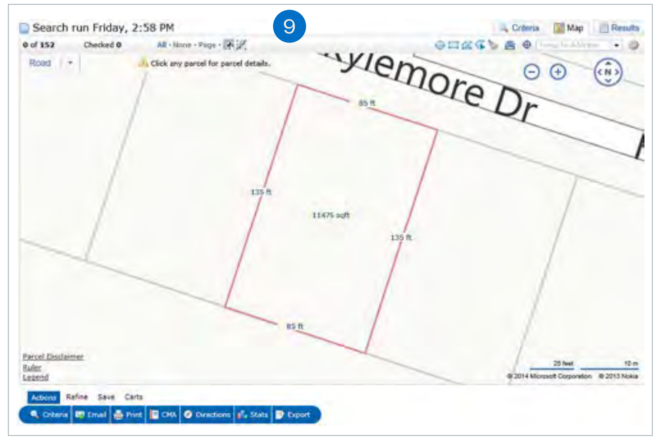
   NOTE: *select the checkbox to select the property.*

9 View **Lot Dimensions** by zooming in on the map, select any lot parcel and, from the information pop-up, select the, “Lot Dimensions” link.

NOTE: *for more information, see the, “Property Map” tab under, “Search Displays” (360 Display) in the, “Search” section.*

10 Select map listing(s) and use the **Button Bar** to perform a task.

NOTE: *see, “Button Bar” section for a full list of Button Bar functionality.*

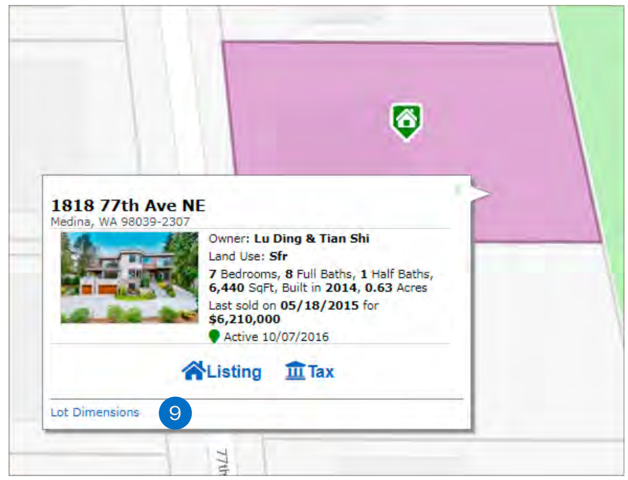


Map Layers

Design your own custom maps by choosing from dozens of layers of geographic information. Each layer can be displayed individually or mixed with others to create the perfect map to meet your needs.

NOTE: *only existing Realist® customers may have access to Map Layers.*

NOTE: *you may be prompted to zoom in to enable certain map layers.*

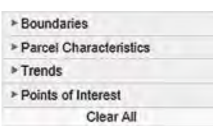


1 Select the **Map** tab.

2 Select and drag the map or **zoom in and out** to your desired location.

NOTE: *use the, “Jump to” dropdown list* Jump to Address *to quickly locate a specific map area.*

3 Select the, **Map Layers** icon to choose which of the following layers to activate.



NOTE: *select a section panel to expand category.*

NOTE: *select the, “Clear All” button to reset the map layers.*

4 Select to expand the **Boundaries** section.

NOTE: *contains colored delineations of geopolitical entities.*

NOTE: *ctrl-select any shaded area for layer details.*

5 Select to expand the **Property Characteristics** section.

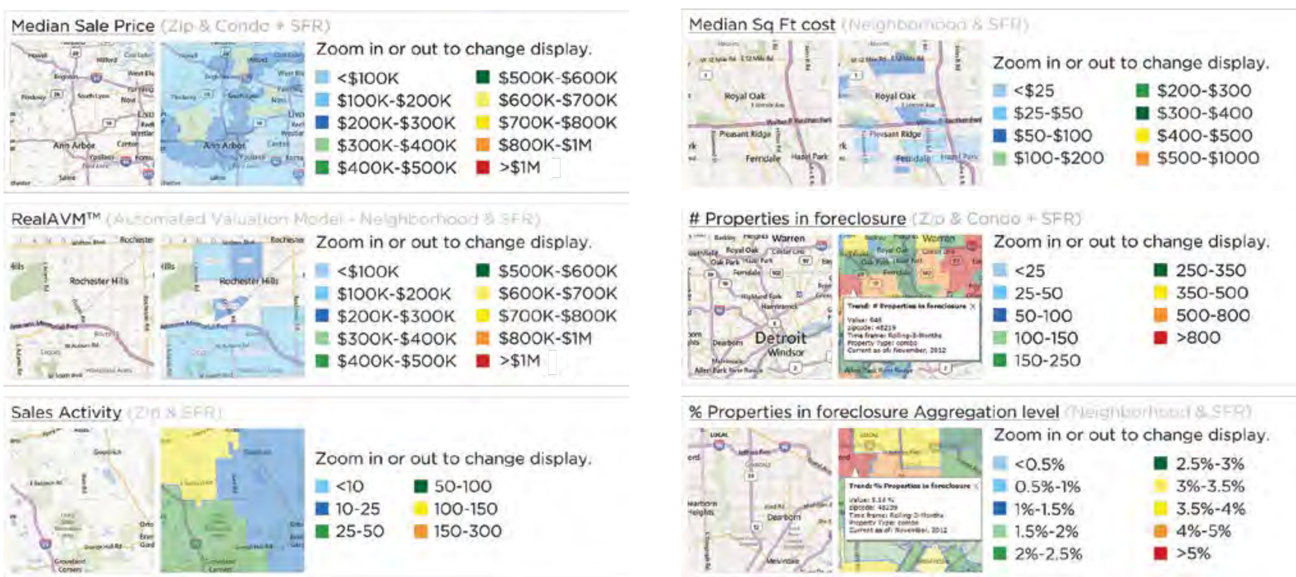
NOTE: *contains detailed information about individual properties.*

NOTE: *select any parcel for parcel details.*

6 Select to expand the **Trends** section.

NOTE: *contains aggregated information available for condos, single-family, or both, for each of zip and neighborhood aggregation levels.*

NOTE: *ctrl-select any shaded area for layer details.*



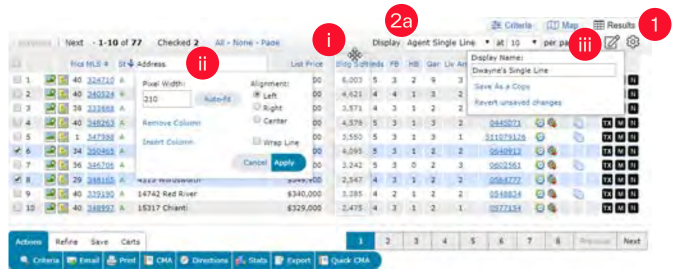
7 Select to expand the **Points of Interest** section.

NOTE: *Bing-provided, local business and community location markers.*

Search Displays

1. Select the **Results** tab.

2. Select the **Display dropdown list** to change your current Display.



2a **Single Line Grid**

i. Select and drag a column header to **move the field** to a new position on the grid.

ii. Select the column header to open the **Column Settings** for this field.

Width: enter a fixed pixel width or select, “Auto-fit” to set a dynamic width that adjusts to accommodate the widest text width.

Remove Column: deletes the current column.

Insert Column: adds a new column beside the selected column.

Align: left, right or center align the data within a column.

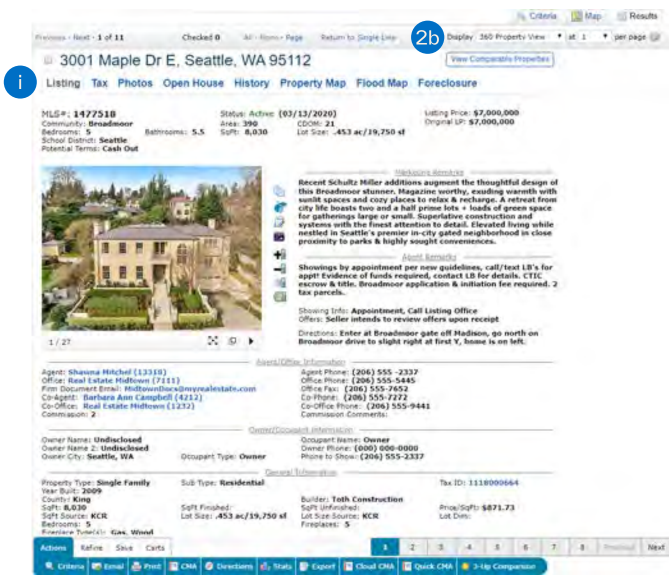
Wrap: ensures content is always visible by wrapping long data within a narrow cell.

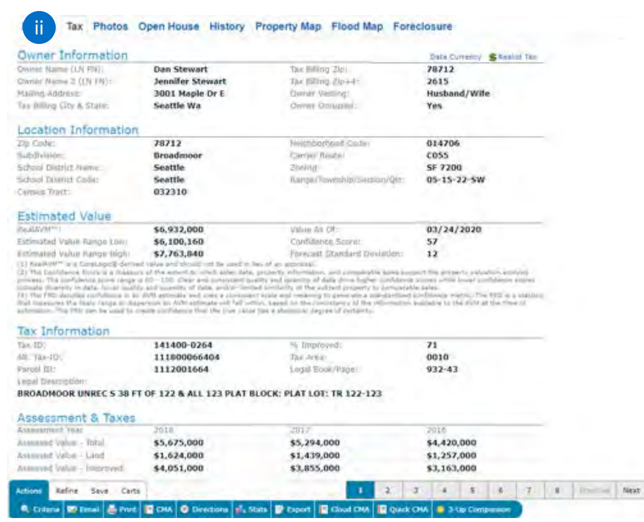
Apply: commits your changes to the column.

NOTE: *selecting the header text - or directional arrow – will sort the column.*

iii. Select the, “**Manage Display**” icon to save your new Custom Display to the, “Display” dropdown.

2b **360 Display** (Multi-tab Property View)

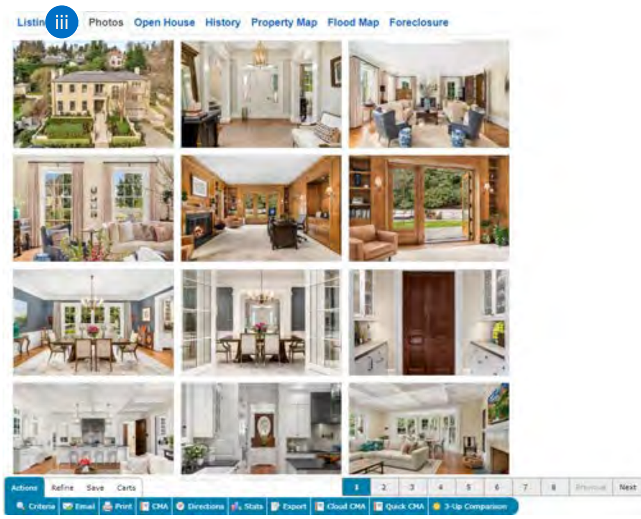


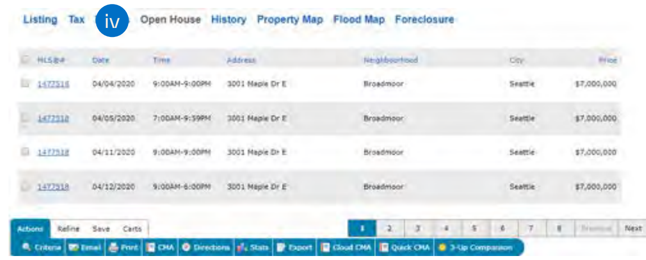


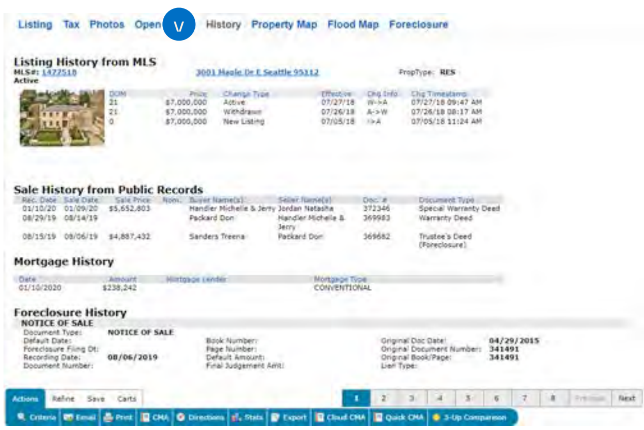
i. **Listing:** view property details from either the current listing or from when the property was last listed.

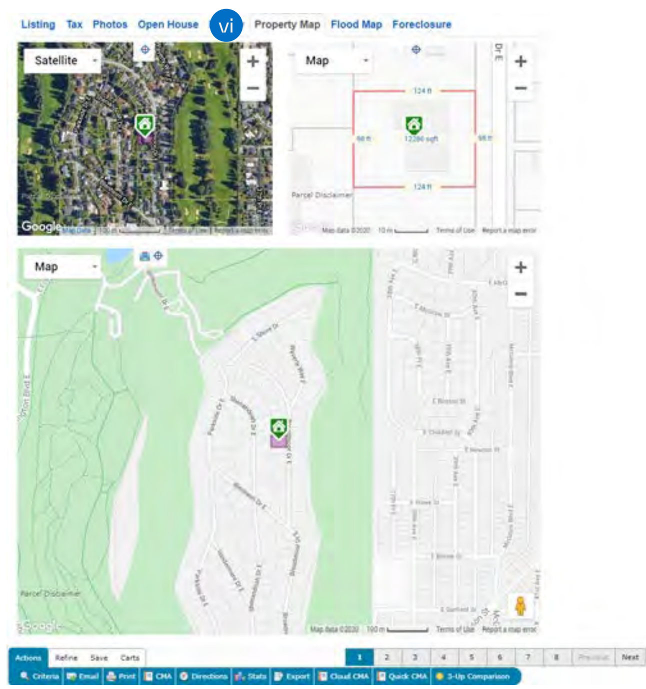
NOTE: *select the, “View Comparable Properties” button to select this as a CMA Subject Property and auto-generate 20 Comparables. For more information, see, “CMA (Import Properties)” in the, “My Matrix™” section.*

ii **Tax:** view calculated values and up-to-date tax information for this property.







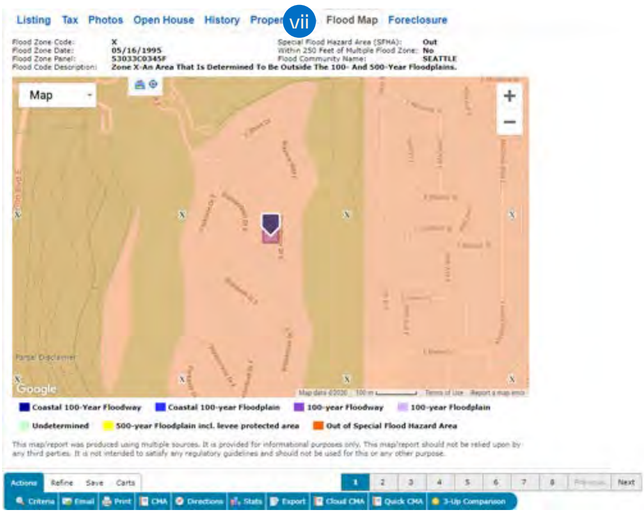


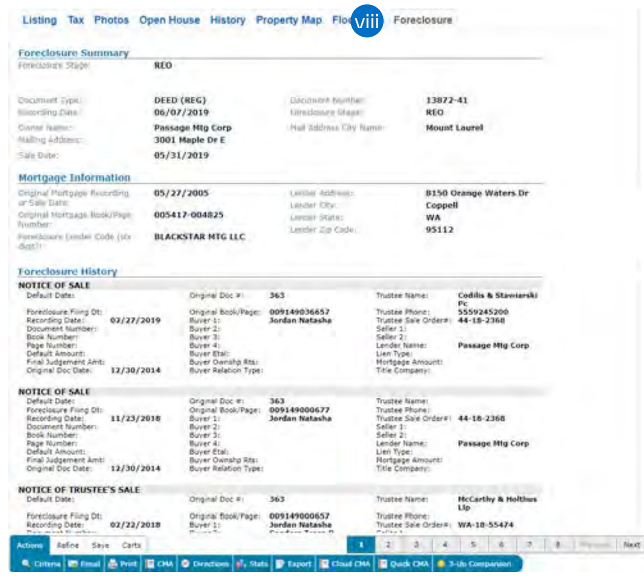
iii **Photos:** view the collection of property photos.

iv **Open House:** view a collection of Open Houses scheduled for this property.

v **History:** view a complete history of this property including listing, tax, mortgage and foreclosure information.

vi **Property Map:** interactive maps showing a satellite view, parcel dimensions and an entire block view with geographic overlays.





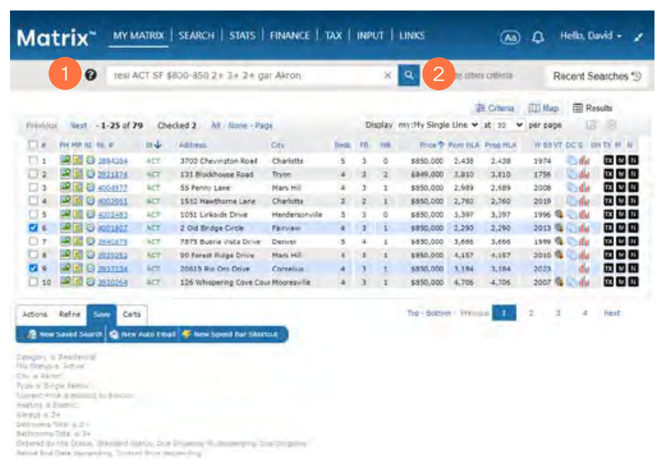
vii **Flood Map:** view flood zones within the surrounding area.

viii **Foreclosure:** if enabled, view foreclosure details about this property.

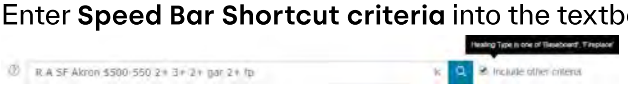
Speed Bar Search (Classic)

Find Matrix™ content quickly using a combination of Speed Bar shortcuts.

NOTE: *the Speed Bar can only be accessed in Classic mode (for more information, see "Utility Menu" under "Navigation & System Tools" in the "Header" section).*



1. Enter **Speed Bar Shortcut criteria** into the textbox.



NOTE: *since each system define their own default Speed.Bar shortcuts, the intention here is simply to illustrate general guidelines around entering the criteria.*

NOTE: *select the Speed Bar help icon ? for a list of commonly used system shortcuts.*

NOTE: *the Speed Bar automatically populates each time a search is run with criteria entered in the, "Criteria" tab. Hover over the, "other criteria" checkbox (if visible) to view any criteria used that has not been defined as a system Speed Bar shortcut.*

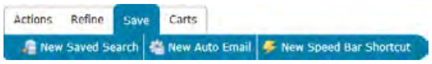
NOTE: *create a custom Speed Bar shortcut to use criteria that has not been defined as a system Speed Bar shortcut (for more information, see the, "Speed Bar Shortcut (Create)" section.*

NOTE: *When using bedrooms and bathrooms together in the same Speed Bar search, bedrooms must be first (i.e. 2+ bedrooms and 3+ bathrooms would be written: 2+ 3+). Also, searching for multiple statuses, the statuses must be grouped together. Otherwise, system Speed Bar shortcuts can, typically, be entered in any order.*

2. Select the **search icon** to generate a search.

Speed Bar Shortcut (Create)

1. Create a **search**.
2. From the, “Results” or “Map” tab, select, “**Save**” > “**New Speed Bar Shortcut**” on the Button Bar.

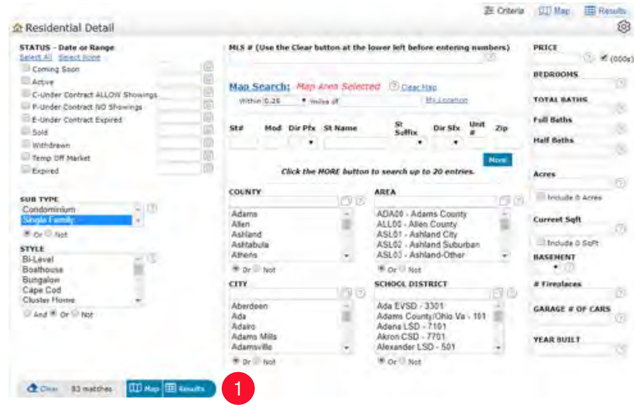


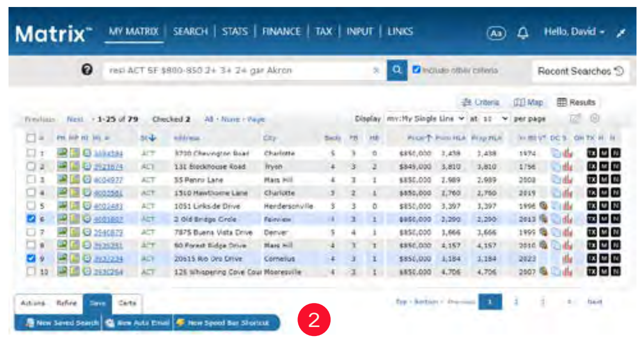
3. Create a **custom name** for your new Speed Bar Shortcut.

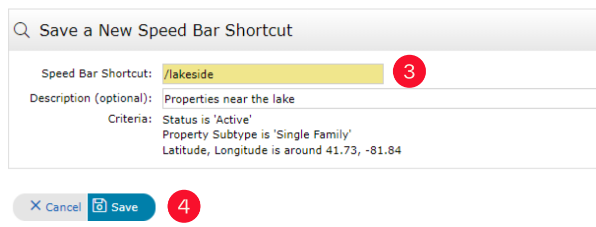
   NOTE: *name must always be preceded by a forward slash (i.e. /lakeside).*

   NOTE: *name may not include spaces, symbols or punctuation.*

4. Select, “**Save**”.

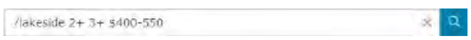






Speed Bar Shortcut (Use)

1. From anywhere in the Speed Bar textbox, **enter your custom Speed Bar Shortcut name.**



   NOTE: *name must always be preceded by a forward slash (i.e. /lakeside)*

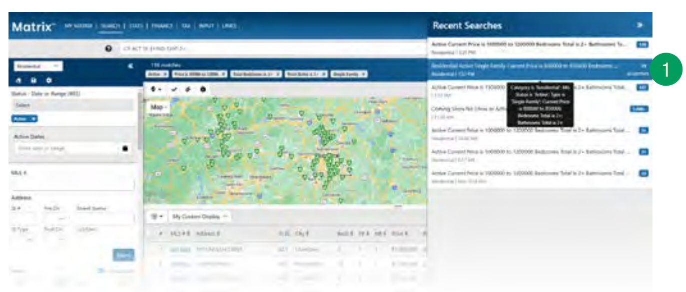
   NOTE: *Speed Bar Shortcut may be combined with other Shorthand criteria.*

2. Select, the Speed Bar “**Search**” icon.

Recent Search

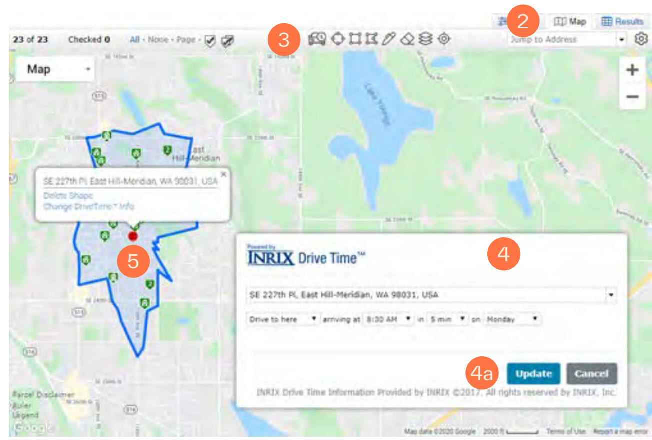
1. From the, “**Recent Search**” drawer, select a previously run search to generate real-time results.

   NOTE: *the Recent Search drawer can only be accessed in Classic mode (for more information, see “Utility Menu” under “Navigation & System Tools” in the “Header” section).*



INRIX Drive Time™

Included as an option in some Matrix™ systems, INRIX Drive Time™ allows agents to isolate listings that are located within a certain driving distance of a specific address.



1. Choose any method to **generate your search results.**

   Note: *for more information, see the, “Search” section.*

2. Select the, “**Map**” tab.

3. Select the, “**INRIX**” icon.

4. From the pop-up, select your **INRIX Drive Time™ criteria.**

   Address: add the origin or destination address.

   Origin/Destination: select whether the address is your origin or destination.

   Time: select what time you would like to reach your origin or destination.

   Duration: select how long you would like to drive for.

   Weekday: select which weekday you will be driving.

   4a. Add the **address.** Select the **button** to view properties within driving range of your origin/destination.

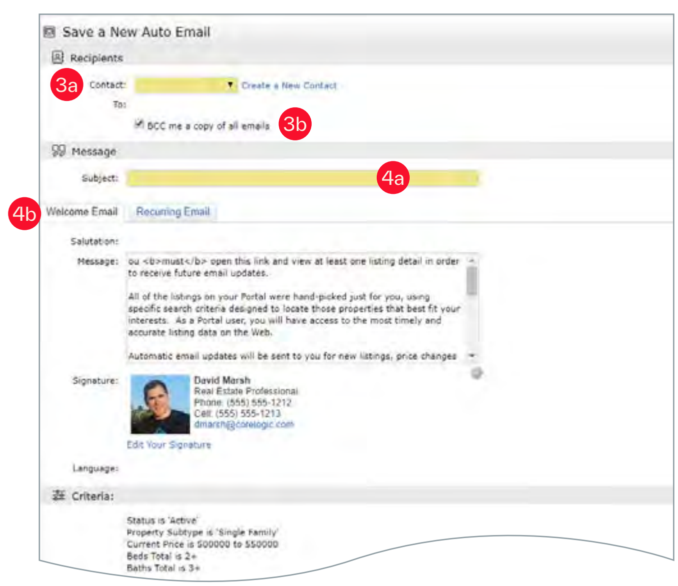
5. Select, or hover, over the INRIX address marker to **delete or edit** your Drive Time settings. Hover, over the origin/destination marker to delete or edit your INRIX Drive Time™ settings.

Auto Email

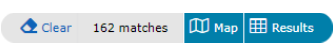
Create an Auto Email that automatically notifies clients whenever new—or, updated—properties match their criteria.

NOTE: *Classic Auto Email functionality can only be accessed by generating results using the Classic Search (for more information, see the “Search (Classic)” section).*

Auto Email (Create)

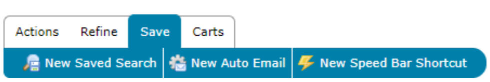


1. Create a **Search** and view the results.

   NOTE: *for more information, see the, “Search” section.*

2. From the, “Results” or, “Map” tab, select, “Save > **New Auto Email**” on the Button Bar.

3. **Recipients**

   3a. Select a, “**Contact**” from the dropdown list (mandatory).

   NOTE: *select the, “Create a New Contact” link to add a contact not yet in your address book.*

   3b. Select, “BCC” to be notified when your customer is sent a new Auto Email.

4 Messages

4a Enter a Subject line (mandatory).

4b Use the default, “**Welcome Email**” and, “**Recurring Email**” or customize the text to create your own messages.

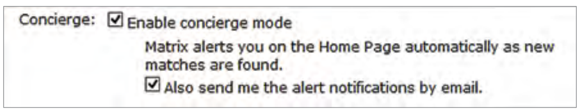
NOTE: *select the, “Settings” icon to either set your custom message as the new default or to reset it back to the system default.*

5 Settings

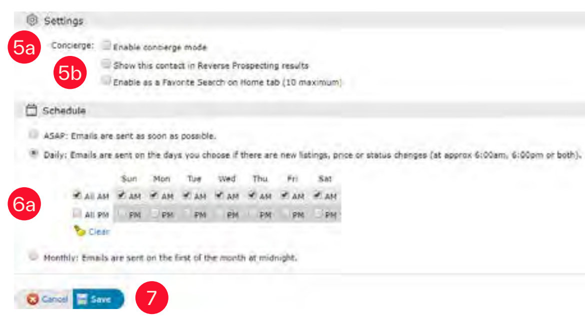
5a An Auto Email, by default, automatically sends a client new, or updated, listings at whatever interval is selected in the, “Schedule” option.

Enable, “Concierge Mode” if you would prefer to review (approve or reject) each listing first before they are sent to the client (optional).

NOTE: *when Concierge is enabled, select the, “Also send me the alert notifications by email” option to be notified, by email, that there are listings waiting for your approval in Matrix™.*



NOTE: Matrix™ alerts you of any new matches in the, “Concierge” Panel on the Homepage (for more information see, “Concierge” under, “Home Panels” in the, “Home” section.) as well as on each page, in the information bar, located just below the menu tabs..



5b Select the, “**Reverse Prospecting**” checkbox to allow listing agents to view when their listing has been sent to this customer.

NOTE: *this feature can also be enabled in the contact’s management area (see, “Contacts (Add) in the, “My Matrix™” section).*

6 Schedule

6a **ASAP:** Emails are sent as soon as possible.

Daily: Emails are sent during the days, and time period, selected.

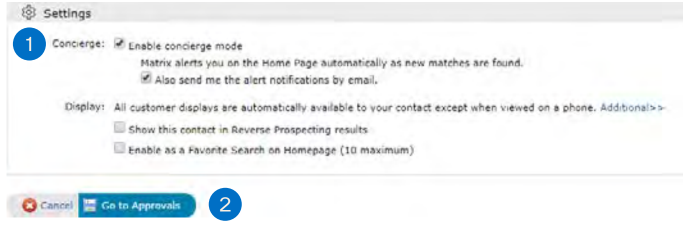
Monthly: Emails are sent on the first day of the month.

NOTE: *Auto Emails that are not read within a system-specified period of time are automatically suspended until re-enabled by the agent.*

7 Select, “**Save**” to create this Auto Email.

NOTE: *if, “Concierge Mode” is enabled, this button takes the agent to the Concierge area where listings can be accepted or rejected.*

Concierge Mode



1. In the auto email's, "Settings" section, select the checkbox to enable, "**Concierge**" mode.

   Also send me the alert notifications by email: when checked, Matrix™ will alert you—by email—when new/updated listings that match the criteria have been added.

   Additional: enables the selected, "Additional display" for this client in OneHome.

   Show this contact in Reverse Prospecting results: when checked, allows the listing agent to see that this (anonymous) client has been sent their listing.

   Enable as a Favorite Search on Homepage: when checked, adds this search—for quick access—to the Homepage Favorite Search Panel.

2. Select the, "**Go to Approvals**" button to save this auto email's settings and proceed to the Concierge's approval page.

3. Select which properties to **approve or reject.**

   Folder: displays an icon if the property has already been favorited or discarded by this client

   Emailed: displays the date that the property had previously been emailed to this client.

4. Select an **action.**

   Done: closes the Concierge without rejecting or approving any properties. These properties can be later accessed via the Notification icon in the Matrix™ header or the Concierge Panel located on the Homepage.

   Reject: removes the selected properties from being sent to this client.

   Approve Selected: emails the selected properties to this client.

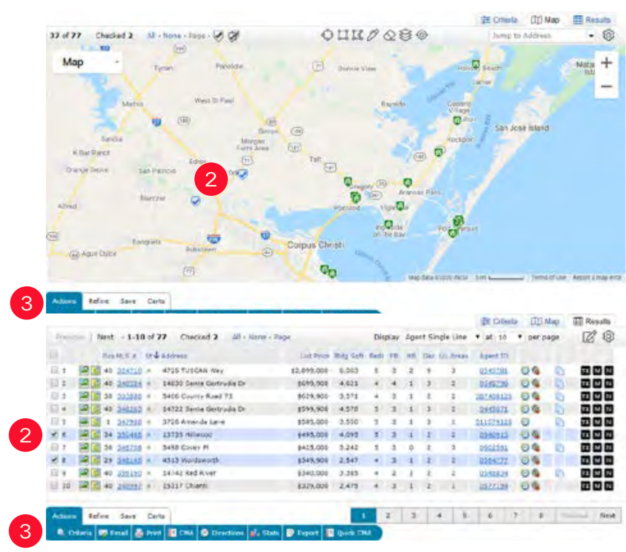
   Print: prints the selected properties using the selected print display.

   Directions: creates driving directions using the selected properties.

   Carts: adds the selected properties to this—or another—client's cart.

Button Bar

Button Bar



1. After generating a search, view your results on either the **Map** tab or **Results** tab.
2. **Select** properties.
3. From the **Button Bar**, choose an action.

Actions

Criteria: return to the criteria tab.

Email: emails the selected properties to one, or more, of your contacts.

Print: prints reports, displays and mailing labels using the selected properties.

Print with roll-outs (if any) open: roll-outs help keep Matrix™ 360 Displays organized by collapsing specific sections. When open, prints the information contained within the section.

Print search criteria: prints the criteria used to generate the search.

Ink saver; if any, don't print images: removes all images from printed document.

Print [All] Tabs: prints all selected Matrix™ 360 Display tabs.

CMA: uses the selected properties as comparables in a full CMA.

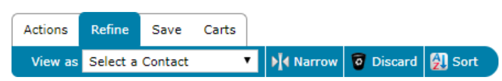
Directions: creates custom, turn-by-turn driving directions using the selected properties.

Stats: quickly creates tabular stats using the properties or, when all properties are de-selected, creates chart stats using the current search criteria.

Export: exports your selected properties as a .csv file using either System-defined or Custom fields (for more information, see "Custom Exports" in the, "Settings" section).

Quick CMA: uses the selected properties as comparables in a Quick CMA .pdf.

Refine



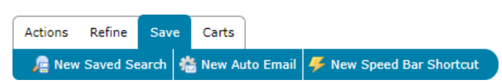
View As: displays if/when each property in the results was previously sent to the selected contact. Also displays a Fit Score—representing how much of a match the associated property is with the selected contact's on-boarding questions answered in their OneHome's, "Planner" section.

Narrow: displays only the selected properties (select the, "Original Results" breadcrumb link (located below the Speed Bar) to return to all properties).

Discard: removes selected properties from the results (select, "Un-Discard" to undo this action).

Sort: sorts the results into groups according to the sort fields chosen.

Save



New Saved Search: saves your search criteria to use again for a general search or for a specific contact. You may also include your search as one of 10 favorites on the, "My Favorite Searches" Homepage Panel (access all saved searches under, "My Matrix™ > Saved Searches").

New Auto Email: automatically sends listings, based on the search criteria, to a specific contact at scheduled times (for more information, see, "Auto Email (Create)" in the, "Auto Email" section).

New Speed Bar Shortcut: creates a custom Speed Bar Shortcut based on the current search criteria to use in the Speed Bar. Access all saved Speed Bar Shortcuts under, "My Matrix™ > Settings > Speed Bar Shortcuts" (for more information, see, "Speed Bar Shortcut (Create)" in the, "Search" section).

Carts

Select Cart: a collection of available carts to select.

Add to: adds the selected properties to the selected cart.

View: displays the properties contained in the selected cart.

New Cart: creates a new, custom cart associated with a specific contact.

Input

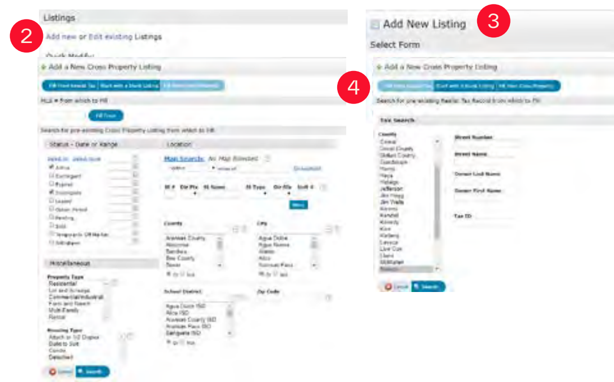
Listing (Add New)

1. From the Matrix™ navigation menu, select the, "**Input**" tab.

2. Select the, "**Add new**" link.

3. Choose the appropriate **Property Type** form.

4. Choose how to fill the Property form.



Fill From Existing Listing: fill the form from an existing listing. Search by listing number or search for a pre-existing Cross Property listing from which to Fill (for more information, see, "Criteria Search" in the, "Search" section).

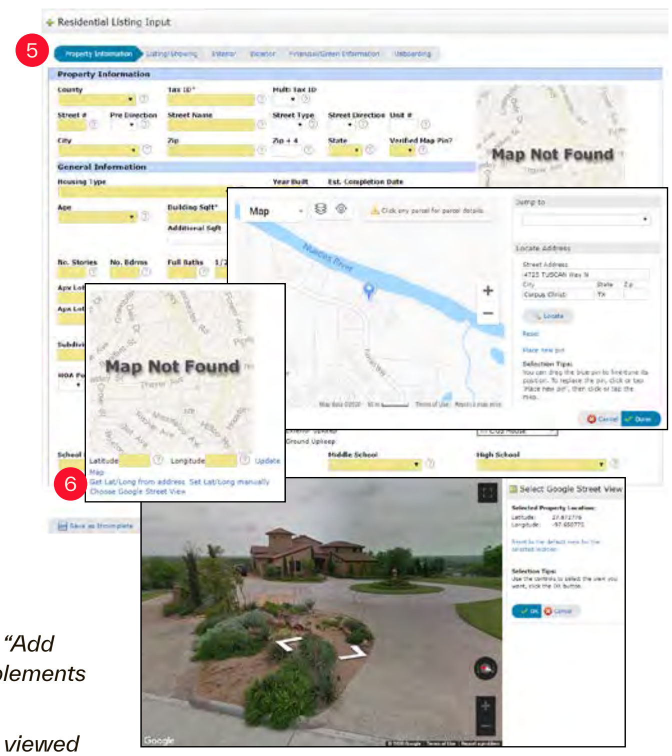
Fill From Tax: fill the form using information such as a tax number. If multiple tax results are returned, simply select which tax year you would like to fill from.

Start with a blank listing: fill the form beginning with empty fields.

5. Using the **Input Wizard**, fill the Property form as required.

NOTE: *input wizard section names may vary depending on the Matrix™ system.*

NOTE: *all highlighted Matrix™ Input fields are mandatory and must be completed before you are able to submit the listing.*



6. Choose a method to **map** your listing then visually verify that
the property pin is in the correct location.

Get Lat/Long from address: automatically links the map pin with the
property address entered on the Input form.

Set Lat/Long manually: from the map popup, enter the property address or zoom + − to find the exact location to drop the property pin.

Choose Google Street View: position how this property should appear from the street view.

7. Select an **action** on the Button Bar.

Save as Incomplete: *saves your listing—as is—and redirects to the, "Add New Photos and Supplements" page (see, "Photos and Supplements (Add New) in the, "Input" section for more information).*

Validate: *if errors exist (such as empty, required fields), they can be viewed by selecting the error link located above the Button Bar and will be identified in each section with an, "Alert" icon ⚠.*

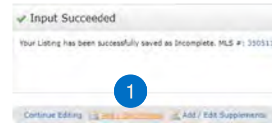
Cancel Input: *cancels the form process and returns to the, "Add New Listing" page.*

Submit Listing: *submits this new/updated listing to the system.*

Photos and Supplements (Add New)

After your listing has been submitted live or saved as incomplete, you may add photos and/or supplements.

1 From the Button Bar, select, “**Add/Edit Photos**” to add listing photos.



1a Select the, “Browse” button to **locate the listing photos** on your hard drive then drag your cursor over multiple images (or CTRL and select individual images) to select the ones you would like to upload.

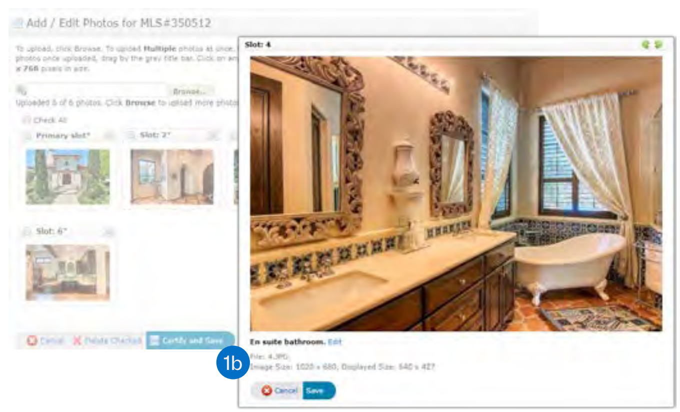
NOTE: *maximum number of photos vary depending on your system.*

NOTE: *for best quality, upload photos that are at least 1024x768 pixels.*

1b Once listing photos have uploaded, select any thumbnail to enlarge the image and add a **photo description** (optional). Select the, “Done” link when finished, followed by, “Save” on the Button Bar.

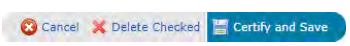
NOTE: *thumbnails outlined in red indicate the image dimensions are smaller than recommended.*

1c Select and drag the thumbnail, “Slot: [#]*” **to reorder** the photos as you would like them to appear in the listing.



NOTE: *the, “Primary slot” indicates which image will display as the Primary photo on the listing.*

1d Select, “**Save**” when complete.

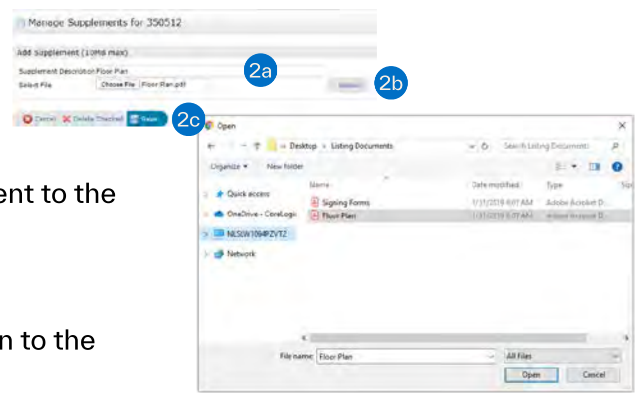


2 From the Button Bar, select, “**Add/Edit Supplements**” to add listing supplements (also known as, “Attachments”).

2a Enter the listing supplement information.

Supplement Description: *describes the listing document (optional).*

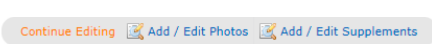
Select File: *browse your hard drive and select a document to upload (accepted file types vary between systems but may include .pdf, .doc, .docx, .txt, .rtf).*

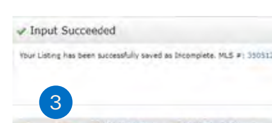


2b Select the, “**Upload**” button to upload this supplement to the listing.

2c Select, “**Save**” when complete.

3 From the Button Bar, select, “**Continue Editing**” to return to the Input Wizard.





Listing (Edit Existing)

1. From the Matrix™ navigation menu, select the, “**Input**” tab.

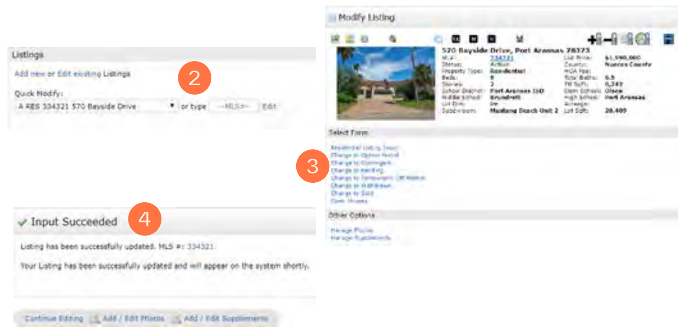
2. **Choose a listing to edit** either by selecting the, “Edit existing” link, by selecting a listing from the dropdown list or by entering a listing number in the textbox.

3. Select which **part of the listing to edit.**

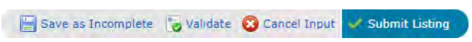
   NOTE: *select the Property Type link (i.e. Residential, Commercial etc.) to edit any of the fields from the listing.*

   NOTE: *select the, “Manage Photos” link to update listing photos.*

   NOTE: *select the, “Manage Supplements” link to update listing supplements.*



4. When your **listing has been updated**, select, “Submit listing” on the Button Bar.



Auto Save

1. Matrix™ automatically **saves new listings** after several minutes if:

   a. no keyboard input is detected

   b. you navigate away from the Input screen

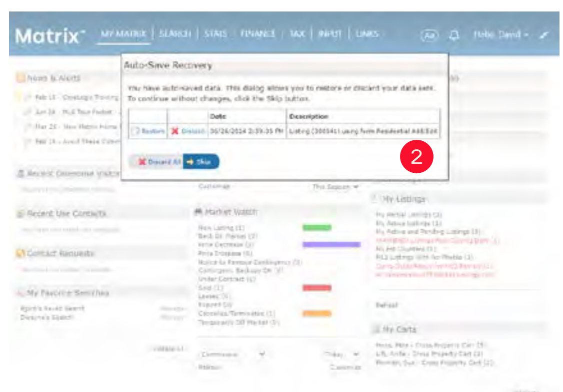
   c. you switch between Input wizard sections

2. The **Auto-Save Recovery** screen will automatically be displayed immediately after you next sign into Matrix™.

   Restore: select the, “Restore” link to return to the auto-saved listing and continue from where you left off.

   Discard: select the, “Discard” link to discard any auto-saved changes to the listing and close the auto-save recovery screen.

   Skip: select, “Skip” on the Button Bar to close the auto-save recovery screen (the auto-save recovery screen will once again display the next time you sign into Matrix™).



20253058-Matrix 12 Classic-0509

Quick Start Guide

The Branding Center

Confidential to Cotality™

Contents

Introduction

Welcome 1
Branding Center Desktop Compatibility. . . 1
Branding Center Mobile Compatibility 2

Branding Center Access

Matrix™ 3
Agent Portal. 3
MLS-Touch | Prospects Mobile 3

Brand Kit

Default Brand Kit 4
Pre-set Brand Kit 5
Custom Brand Kit (Add) 6
Custom Brand Kit (Edit) 8

Introduction

Welcome

Being a real estate agent is one of the most competitive roles in the market today, which is why it is essential to stand out.

The Branding Center is a tool that allows you to quickly and easily showcase your own professional brand across your Matrix™ emails, the MLS-Client/GoAgent app, and the OneHome™ client portal.

With your new Branding Center, you can:

- Position yourself as the expert who is ready to assist your clients and prospects on their home buying and selling journey
- Personalize public-facing content with your own professional brand
- Make it super easy for clients to recognize and remember you and your professional brand
- Ensure your brand is consistent across all Cotality™ platforms with a single update
- Enhance your clients' perception of your services and expertise by providing a professional, consistent, polished look.

Branding Center Desktop Compatibility

The Branding Center is compatible with the latest browser versions supported by mainstream operating systems.

Operating systems and browsers such as Windows XP, Windows Vista and Internet Explorer 8 and 9 (IE8, IE9) are no longer in mainstream support. Anyone using a previous version of these browsers will see a warning at login to encourage upgrading. Browser-related issues that can't be resolved by upgrading to the latest version will be reviewed and resolved on a priority and best-effort basis. Cotality will support upgrades to browsers as soon as reasonably practical following availability of the new browser version in new retail computers.

Desktop users who choose to use Internet Explorer (IE) on Windows 7 and Windows 8 can upgrade to IE11. Windows 10 users can use IE11 or Edge Browser. Firefox and Chrome automatically update to their most recent versions regardless of underlying operating system. Matrix™ supports the following desktop browsers:

- Internet Explorer 11 and Edge Browser
- And the most recent versions of:
  - Safari
  - Android Browser
  - Chrome
  - Chrome Mobile
  - Firefox
  - Safari Mobile

Branding Center Mobile Compatibility

iPad and Android tablet users should install the most recent version of their browser.

The Branding Center supports the following Mobile browsers:

- iOS Safari
- iOS Chrome
- Android Browser
- Android Chrome

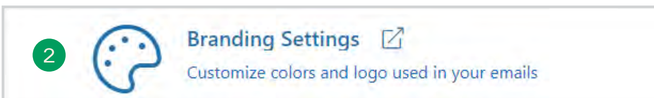
Defects reported against other mobile platforms will be fixed on a best-effort basis.

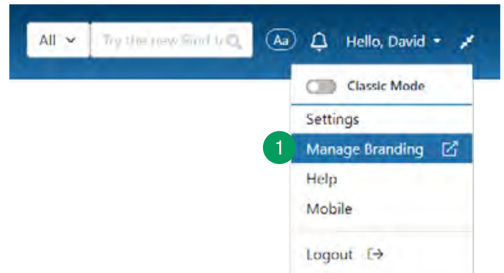
Branding Center Access

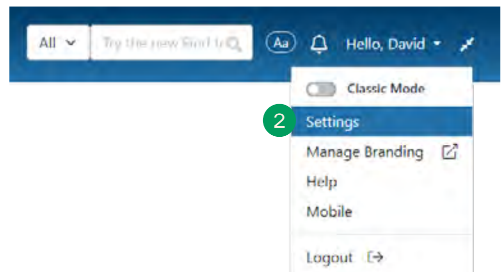
Matrix™

Matrix™ offers the following two methods for accessing the Branding Center.

1. **Utility Menu:** from the Utility Menu, select “Manage Branding”.
2. **Settings Section:** from the Utility Menu, select “Settings” and then select, “Branding Settings”.



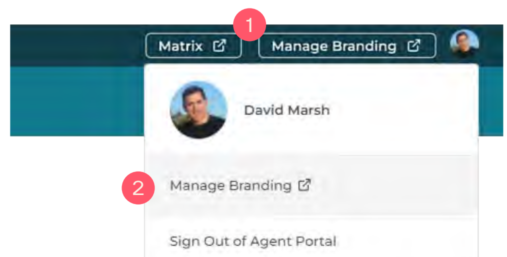




Agent Portal

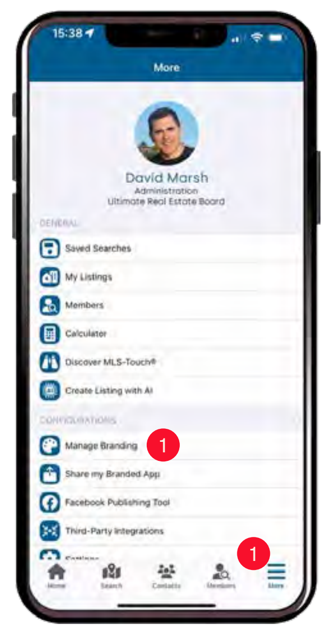
The Agent Portal offers the following two methods for accessing the Branding Center.

1. **Agent Header:** from the Agent Header, select the “**Manage Branding**” button.
2. **Utility Menu:** from the Utility Menu, select, “**Manage Branding**”.



MLS-Touch | Prospects Mobile

1. From the “**More**” section, select the “**Manage Branding**” option.



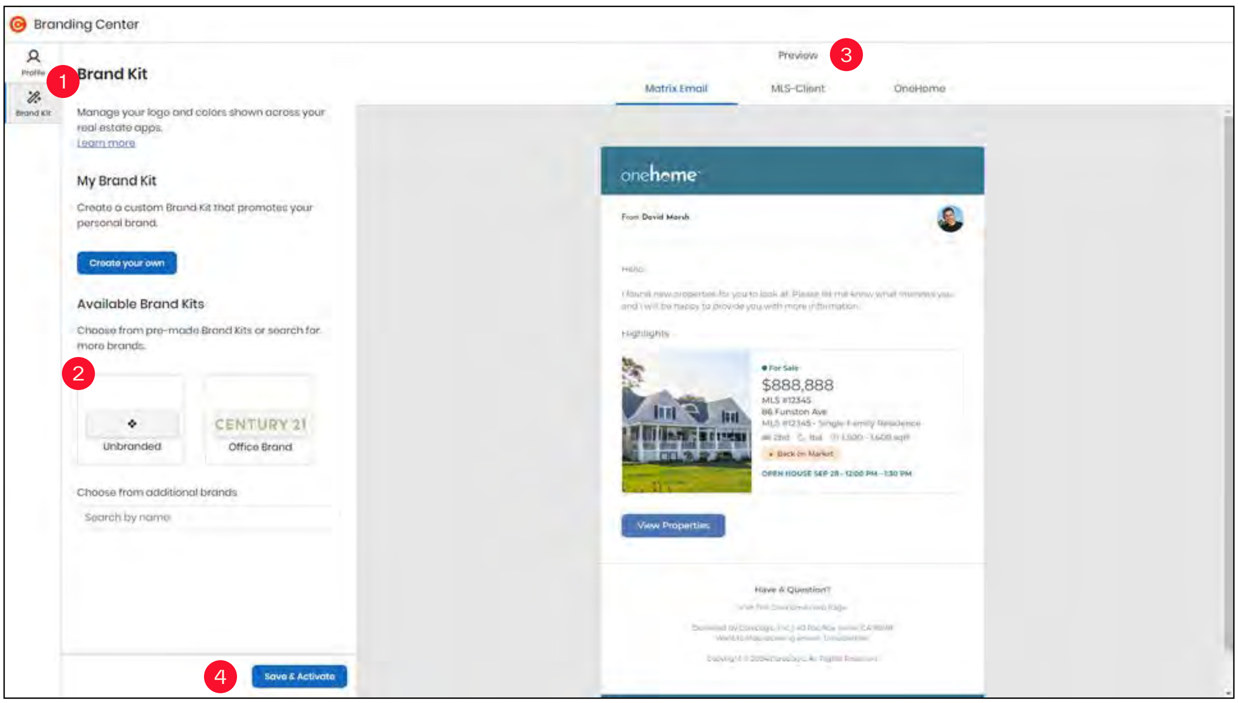
Brand Kit

Each Brand Kit contains a company logo and its associated color scheme.

To apply consistent branding across each of your select Cotality real estate applications, you may either choose to use the **default** branding, a Brand Kit from a list of popular **pre-set** options or create a **custom** Brand Kit of your own.

Default Brand Kit

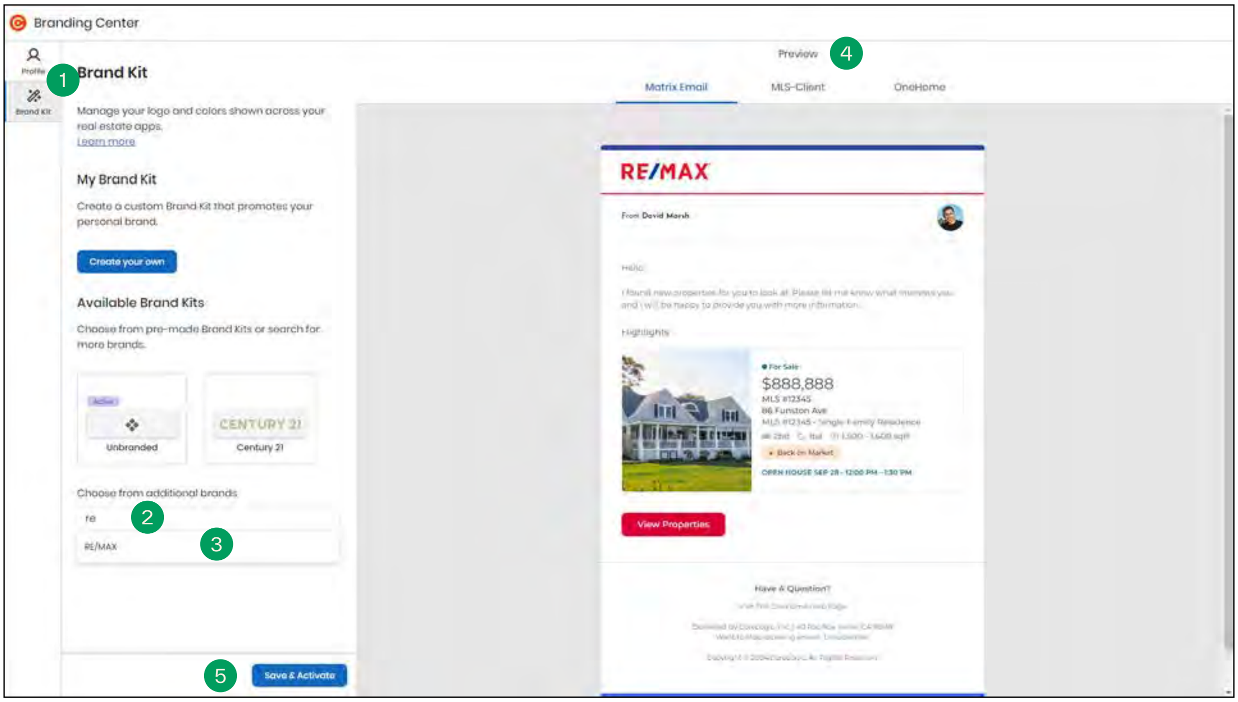
The Default Brand Kit applies each product's default logo and color scheme to its associated application — ensuring a consistent look that represents each Cotality brand.



1. Select the "**Brand Kit**" tab.
2. From the "Available Brand Kits" section, select the "**Unbranded**" Brand Kit.
3. **Preview** how the default brand appears in each app.
4. Select the "**Save & Activate**" button.

Pre-set Brand Kit

The Pre-set Brand Kit allows customers to select from a list of preloaded offices — instantly applying that office's logo and color scheme to their applications.



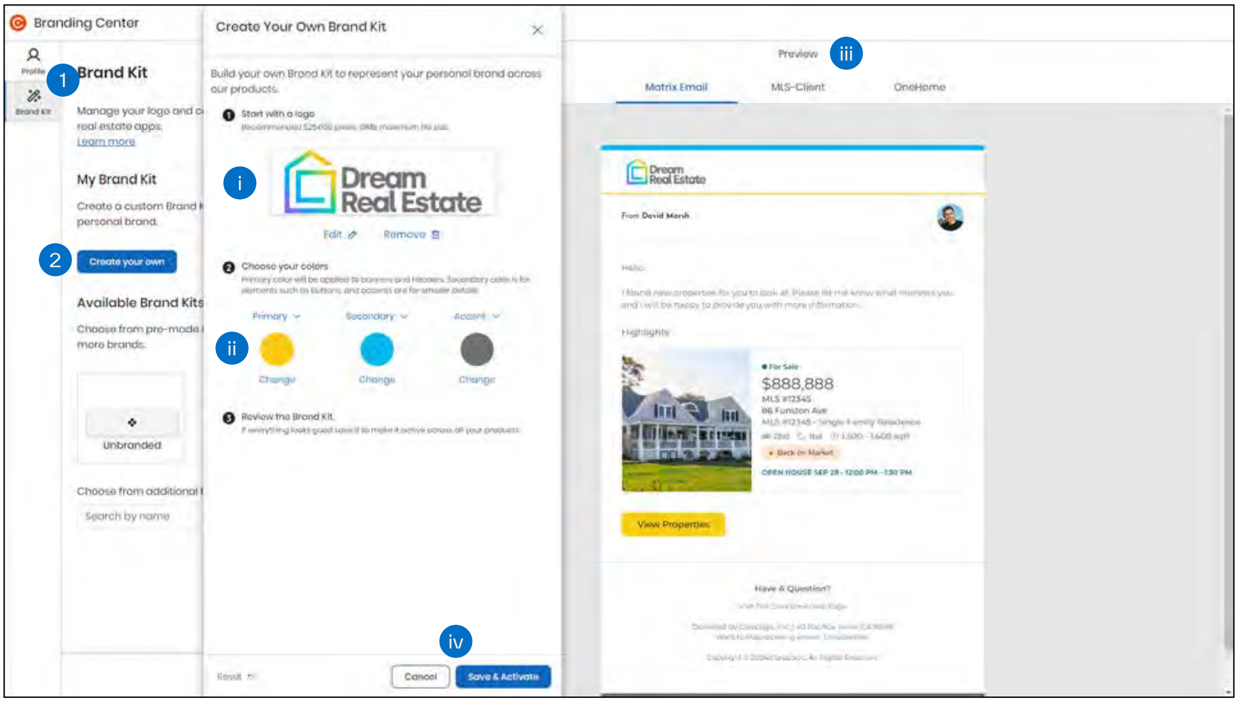
1. Select the "**Brand Kit**" tab.
2. From the **search** textbox, begin typing your office name.
3. From the suggested names, **select your office**.

   NOTE: *if your office is not listed as a pre-set option, you will need to create your own Custom Brand Kit.*

   NOTE: *if the agent roster includes your office details, then your pre-set Brand Kit may already be selected by default.*
4. **Preview** how the selected brand appears in each app.
5. Select the "**Save & Activate**" button.

Custom Brand Kit (Add)

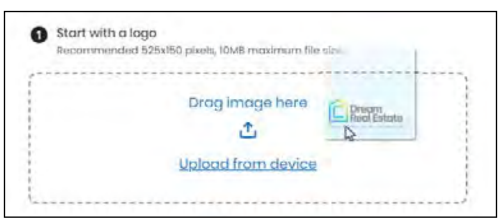
The Custom Brand Kit allows users to upload their own logo and choose their own color scheme — providing a personalized look that aligns with their unique brand identity.



1. Select the "**Brand Kit**" tab.
2. Select the "**Create your own**" button.

   i. **Start with a logo.**

      a. **Drag or upload** your office's .jpg or .png image from your device.

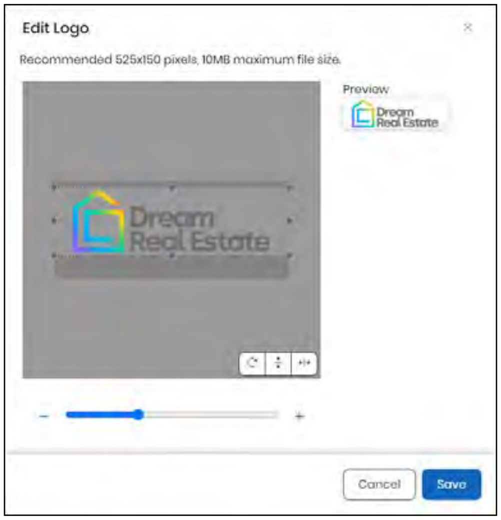


      b. Use the slider to **adjust** the size of the logo to fit within the viewing area.

      Use the transform buttons to rotate the logo, flip it horizontally or flip it vertically.

      NOTE: *manually shift the viewing area or grab its handles to adjust the visible portion of the image.*

c. Select the “**Save**” button.



ii Choose your colors.

a. Select each “+” icon to choose your brand’s Primary, Secondary and Accent colors.

NOTE: *by default, the Custom Brand kit will automatically identify the Primary, Secondary and Accent colors of your selected image.*

NOTE: *select the arrow icon for color swap options.*

b. From the **Color Picker**, either select a color from the palette or use the arrows to enter a specific HEX, RGB or HSL value.

c. Select the “**Apply**” button.

iii **Preview** how the selected image and colors appear in each app.

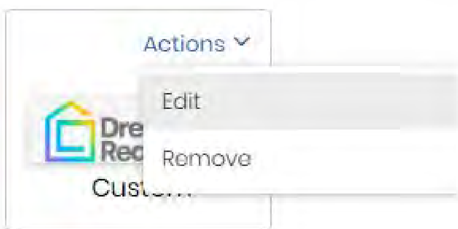
iv Select the “**Save & Activate**” button.

Custom Brand Kit (Edit)

1 Select the “**Brand Kit**” tab.

2 From your custom Brand Kit, select the “**Actions**” dropdown list.

3 Select “**Edit**”.

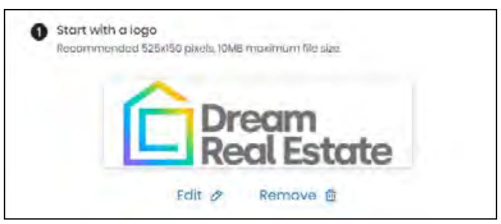


NOTE: *selecting “Remove” will delete this custom Brand Kit.*

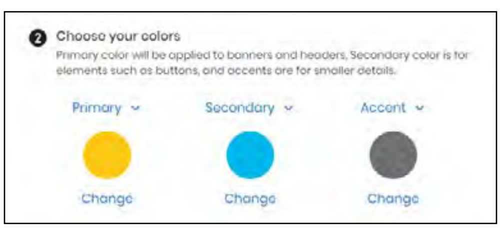
i **Start with a logo.**

a. Select the logo’s “**Edit**” option to adjust the image.

NOTE: *selecting “Remove” will delete the image.*



ii **Choose your colors.**



NOTE: *for more information, see “Choose your colors” in the “Custom Brand Kit (Add)” section.*

iii **Preview** how the selected image and colors appear in each app.

iv Select the “**Save & Activate**” button.

20253058-The Branding Center Quick Start Guide-0509