



Advanced Matrix

matrix.swflaml.com

Customizing Your Market Watch and Hot Sheets

The Dashboard page widgets include Market Watch and Hot Sheets widgets. Market Watch gives you a quick glance at the activity in the MLS, clicking on any of the links will take you to those listings, i.e. clicking on New Listing will take you to a single line report with the new listings. The Hot Sheets also gives you quick links to listings that have had status, and price changes. Both the Market Watch and Hot Sheets are customizable.

To change the criteria for the Market Watch, simply click on "**Customize**" found in the Market Watch Widget. This will take you to a search screen where you should input your criteria. For instance, if you want to see only listings in the Naples Geo Areas, select "All Naples Areas" and click on the "**Save**" button. You can also change the date range by clicking on the drop-down menu and selecting either, 24 Hour, Today, 3 days or 7 days.

Hot sheets have the option to create multiple detailed customized searches. There are multiple parts to the customization that you can do. First is the time range. From the drop-down menu you can select:

1. **New Only:** Shows listings which are New/Changed since the last time you ran a hot sheet. For example: if you log in at 9:00 AM and run the Hot Sheet, then later within that same session* run it again, this option would show only listings new/changed since 9:00 AM.
2. **This Session:** Shows listings which are New/Changed since the last time you ran the Hot Sheet in a prior session. For example, if you log in at 9:00 AM and run the Hot Sheet and see 50 listings, then later within that same session run it again, this option will now show you those same 50 listings plus any new/changed listings since 9:00 AM.
3. **24 Hour, Today, 3 Days and 7 Days:** Shows listings which are new/changed in the specified time frame.

4. **Custom:** Allows you to set a custom date or time range of current date from which to run within the last 30 days. Note: Custom date or time settings cannot be saved.

*A session is from the time that you login to Matrix to the time you log out of Matrix.

In addition to customizing the time range you can also customize the criteria. Follow these steps:

1. Click "**Customize**" found at the bottom left side of the Hot Sheet Widget.
2. Click "**Add.**"
3. Choose the Hot Sheet Type that you want to create. Input a name for the Hot Sheet.
4. Click "**Save.**"
5. Click on the name of the Hot Sheet that you just created and click the "**Edit Criteria**" button.
6. Enter your criteria for the Hot Sheet, make sure to include the change types that you want to see, i.e. New Listings, Sold, etc.
7. Once you have entered your criteria click on the "**Save**" button.
8. This brings you back to the Manage Hot Sheets screen, click "**Done**" to be returned to the Dashboard.
9. In the Hot Sheet widget, you will see the same name of the Hot Sheet you just created; clicking on the name will return the listings that match your criteria.

Working with Contacts

Contacts appear under the "**My Matrix**" tab. To expand a Contact and view/edit all items assigned to the Contact, click the Contact's name.

Deleting a Contact (Note: Any Watched Listings attached to a contact will also be deleted):

1. Select the check box to the left of the contact's name.
2. Click on the Checklist Icon at the top left of the Contacts page.
3. Click "**Delete.**"
4. Click "**OK**" to confirm deletion.

Adding a Contact:

1. Click on the "**Add**" button at the top right of the screen.
2. Fill out the Add a Contact page with the contacts information. All yellow fields are required.
3. Click "**Save.**"

Customer Portal

Your customer's portal is where all emails and properties you have sent them will be stored. To view your customer's portal:

1. Hover over "**My Matrix**" and click "**Contacts**".
2. Click on your selected contact's name.
3. Click the button "**Open Portal**" at the bottom of the Contacts page.
4. To view emails you have sent them, click "**Messages**" (Emails whose subject line is in bold have not been opened by your customer).

5. To view all listings sent to your customer click **“Find a Home”**.
6. The map with the preview of the properties to the right is the default view. To change the view in which the properties are displayed click on the three dots in the upper right corner. Views include:
 - a. Customer Single Line
 - b. Customer Financial Report
 - c. Customer Photo Report
 - d. Full Property Report
 - e. Custom Displays (if set-up)

Portal Notifications

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

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

Custom Single Line Displays

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

Changing Fields on the Results Screen

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

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

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

Creating Custom Single Line Displays from My Matrix

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

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

Deleting Custom Single Line Displays

To delete a saved Custom Single Line Display you will need to go Click the down arrow next to “**Hello, *Your Name Here***”>Select “**Settings**”>Click on “**Custom Displays.**”

From the drop-down menu select the Property Type of the Custom Single Line Display, i.e. Residential Rental. Click on the name of the Single Line Display and then click on the **Delete** button.

Creating and Exporting Custom Single Line Displays

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

1. Click the down arrow next to “**Hello, *Your Name Here***”>Select “**Settings**”>Click on “**Custom Exports.**”
2. From the drop-down menu select the Property Class that you want to create the Custom Export for.
3. Click on the “**Add Export**” button.
4. Enter an Export Name.
5. Under Available Fields highlight the fields that you want included and click on the “**Add**” button, this will move the fields to the Export Fields Box.
6. Beneath the Available Fields box is a Search box where you can input the name or partial name of the field that you are looking for, i.e. put in “price” to get all price fields.
7. Beneath the Search box, next to Include Column Names, select “**Label.**”
8. Once you are done creating your custom export click on “**Save**”.

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

Auto Email

Auto Email allows you to set up a saved search to automatically email new listings and listings that have changed in status or price to a contact. Matrix will send them out as soon as they are entered into MLS. As a result, your Contact will receive up to date listings based on the email schedule that has been set up. Note: There is a limit of 500 listings that can be sent per email.

Setting up an auto email:

1. In Matrix hover over the Search menu and select the property class that you want to search in, i.e. Residential.
2. On the search criteria screen input your criteria for your customer and click on the “**Results**”

- tab found at the top right side of the screen.
3. You will now be on the Single Line Display with your search results. At the bottom of the screen on the Button Bar click **“Save”** and then click **“New Auto Email.”** NOTE: There is a max limit of 500 listings allowed to be sent in an email.
 4. You will be brought to a screen where you will need to select a contact from the drop-down menu to send the email updates to, you will need to input a subject for the email, you can input a message if you wish.
 5. There are two types of Auto emails, the first type is Concierge, this auto email requires your approval before listings are sent to your customer. When you log into Matrix, you will see a notification in the **“bell”** icon if you have any listings that are waiting to be approved to be sent to your customer. The second type automatically sends email updates without waiting for your approval.
 6. If you want to approve the listings before they are sent to your customer check the **“Enable Concierge Mode”** box found under the Settings section and skip to step 8. *
 7. If you want the listings to go out automatically without any intervention from you, go to the Schedule section and select the frequency you want the emails sent.
 - Daily:** Choose which days and either AM or PM. Whichever days and times you select is when your client will receive an email.
 - Monthly:** All listings for the month are compiled and emails are sent on the first of the month at midnight.
 8. Click on **Save** to save your Auto Email.

* When using the Concierge option, if there are listings you need to approve to send to your customer you will see a notification in the **“Bell”** icon at the top left of your Matrix screens.

You can edit your auto emails by finding your client from your Contacts list under **“My Matrix,”** clicking on their name and then clicking on **“Auto Emails.”** From there you can click on the auto email’s given name and edit the criteria or change the email settings. You can also edit your auto emails by hovering over **“My Matrix”** and clicking on **“Auto Email.”**

Email History

Matrix keeps track of all emails you send through the system for 90 days. You can view your email history two separate ways:

- By clicking on the **“My Matrix”** tab and then selecting **“Sent Email”**.
- By clicking on the **“My Matrix”** tab and selecting **“Contacts”**. From there you can open up the contact and see **“Sent Email”**.

Accessing Saved Searches

You can view your saved searches by clicking on **“Saved Searches”** from the **“My Matrix”** tab. They will be in order by the Subject line.

You can also view the saved searches you’ve sent to your contacts by clicking on their name in the **“Contacts”** tab.

The details section (opens up when you click on the saved search name) gives you a brief

explanation of the criteria that you have set up. This section also gives you the ability to change the options that you currently have set up. Below is a list of all of the different functions:

1. **Settings** - The settings button gives you the ability to change any of the settings that you have set up for that search, such as the Search Name, the Contact you have attached to the search, and it lets you "Enable as a Favorite Search on Home Tab," which makes the search easily accessible on the Matrix Dashboard
2. **Criteria** – The criteria button gives you the option to revise the search criteria for that search.
3. **Results** – The results button shows you all of the listings that you have saved within that search to date based on your current parameters.
4. **Date Since** – The date since button gives you a list of all of the New or Updated listings from that last time you clicked on this button.
5. **Market Update** – The market update button allows you to optionally choose an update type and/or update date range in combination with the criteria of the original search.
6. **Delete** – This button allows you to delete the saved search.

Carts

Carts are a great way to save special Listings of interest, or Roster records of Agents or Offices that you want to access frequently. Listing Carts are of two varieties, Property Type and Contact.

To add to a Listing Cart:

1. From your search checkmark the properties you want added to a cart.
2. Click "**Save**" at the bottom of the "**Results**" page and then click "**Cart.**"
3. If you have already created the Cart that you would like to add the listing to, select the Cart from the drop-down menu. Otherwise, click "**New Cart.**"
 - *If you are creating new Cart, give the Cart a name and assign it to a Contact.
 - **If you have not already created the contact you would like to assign the Cart to, click Create a New Contact and enter the required fields in yellow.
4. Click the button "**Add to**".

To remove listings in your Cart:

1. Under the widget "**My Carts**" on the Matrix Dashboard, click on the Cart you want to edit.
2. Select the listing/listings you want to remove.
3. Click "**Save**" and then "**Carts**" towards the bottom of the screen.
4. Click the button "**Remove Checked.**"

Team Settings

The Team Settings feature provides users with the ability to access each other's saved searches, contacts, auto emails, and listings. This feature can also be used with assistants.

To set-up a team:

1. Click the down arrow next to "Hello, *Your Name Here*">Select "Settings">Click on "Team Settings."
2. Click on the "Click Here to Create a Team" button enter in the User ID of the person you want on your team and click on the "Find" button.
3. Select to either "Have this member Impersonate me" or "Have this member Work on Behalf of me" and click on the "Add" button.

IDX

Matrix provides framed IDX searches that you can incorporate into your website. There are two types of searches; criteria based search and a map search. You can also frame your listings into your website.

To set-up an IDX Search in Matrix:

5. Click the down arrow next to "Hello, *Your Name Here*">Select "Settings">Click "IDX Configuration".
6. In the IDX Configuration section enter Search in the Name box.
7. In the Form Selection section, choose "Search". In the Display drop down menu, it is recommended to select "IDX Single line".
8. Under the Activation section select "IDX Enabled".
9. Click on the "Save" button found at the bottom of the page.
10. Copy the text that appears in the HTML box, this is the frame link that you will want to incorporate into your website.

To set-up an IDX link to your listings:

1. Click on "Create a new IDX page".
2. Enter My Listings in the Name box.
3. In the Form Selection section, choose "My listings". In the Display drop-down menu, it is recommended to select "IDX Single Line".
4. Under the Activation section select "IDX Enabled".
5. Click on the "Save" button found at the bottom of the page.
6. Copy the text that appears in the HTML box, this is the frame link that you will want to incorporate into your website.

To set-up an IDX Map Search:

1. Click on "Create a new IDX page".
2. Enter Map Search in the Name box.
3. In the Form Selection section, choose "Map Search".
4. Under the Map Area section, it is recommended to select "Do not specify a map area".
5. Under the Activation section select "IDX Enabled".
6. Click on the "Save" button found at the bottom of the page.
7. Copy the text that appears in the HTML box, this is the frame link that you will want to incorporate into your website.

Stats

Statistical reports are available for every property type. There are a number of preset reports that you can customize by adding your specific criteria before generating the report. To access the Stats hover over "Stats" found on the blue navigation menu and select the property type that you want to work in, i.e. Residential.

1. How do I add criteria to a System Preset Stat?

To add criteria, select the Stat from the left side of the screen and on the right side of the screen input your criteria, and then click on the "Generate" icon.

2. How do I change the type of Graph, for instance I want to see a bar graph, not a line graph?

Click on the Customize tab and under the "Chart type" drop-down menu select the type of graph that you want.

3. Is there a way to save the image of the graph?

To save the graph right click on it and select Save image as. This will allow you to save the graph to your computer.

4. How can I view the data that is driving the graph?

After you have generated a graph, click on the "Data" tab to view the data.

Speed Bar Search

The Speed Bar is located directly below the blue navigation menu. This tool gives you the ability to type your search criteria in a form of short hand in order to quickly obtain search results. For instance, entering A \$250-350 will result in Active listings from \$250,000 to \$350,000.

Important abbreviations:

1. A= active, S=sold, P=pending, PC=pending with contingencies, W= withdrawn, X=expired and T=terminated.
2. RINC=residential income, RENT=residential rental, LAND=lot and land, COMM=commercial and BOAT=boat dock.
3. SF=single family, LR=low rise(1-3), MR=mid rise (4-7), HR= high rise 8+, VILLA= villa attached and VILD= villa detached.

The Speed Bar allows you to perform basic searches, such as Active listings that are \$350,000 and less with 3 or more beds and 2 or more baths in NA03 (**A \$350- 3+ 2+ NA03**). Using the Speed Bar Shortcuts you can create in-depth searches and still utilize the Speed Bar.

To create a Speed Bar Shortcut:

1. In Matrix hover over the Search menu and select the property type that you want to create your Speed Bar shortcut for, i.e. Residential.
2. On the search criteria screen input your criteria for your Speed Bar Shortcut and click on the "**Results**" tab found at the top right side of the screen.
3. On the Single Line report click on the "**Save**" button, then click on the "**New Speed Bar Shortcut**" button. Enter a name for the Speed Bar shortcut and click on the "**Save**" button.

To use the Shortcut you created type in the name you just created into the Speed Bar and click enter on your keyboard.

Help with Matrix

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