



Welcome to Matrix Parallel!

We know changing to a new system is never easy. To make the transition smoother, we have put together information on various features within Matrix. Some sections have “To-Do’s” to get you setup with settings and other items. Also, we’ve listed the data changes that occurred with the conversion.

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Welcome to Matrix!

We know changing to a new system is never easy. To make the transition smoother, we have put together some information on various features within Matrix. Some are setup-oriented and have “To-Do’s” associated with them. There is a section on some data changes that occurred as well.

Conversion Timeline

A parallel period will exist where MLXchange/Fusion and Matrix will both be available. During parallel, listing input will only occur in MLXchange/Fusion. The parallel period will begin on **December 1st 2015**. On **January 26th 2016**, parallel will end and the MLXchange/Fusion system will be shut off. Once MLXchange/Fusion is turned off, listing input will only occur in Matrix.

What will convert and what will not? Below is a list of items that will and will not convert from MLXchange/Fusion to Matrix. Each are discussed further in this document to help you transition.

Will Convert	Will Not Convert
Listing Data	CMAs
Open House Data	Custom Reports
Media – Listing Photos and Supplements/Documents	Custom Grids
Listing History – Status and Price	IDX Setup
Agent Data (Membership System data)	Vanity Domain Setup
Office Data (Membership System data)	Personal Information for Reports/Websites
Contacts	Email Signature
Saved Searches	Incomplete Listings

Even though some items are being converted, there may be some changes that you will need to make to your settings in Matrix. Below are “To Do’s” for you to setup Matrix and make your transition easier.

If an item is not being converted, it does not mean the feature is not available in Matrix. For the non-converted items, you will need to either configure the items in Matrix or export information from MLXchange/Fusion as you deem necessary.

As stated above, below is information about various features in Matrix. It goes over the items mentioned above as well as other features. Read through it so you are aware of how things work and what you need to do to make the transition as smooth as possible.

Browser Compatibility

Matrix 6.12 is compatible with the latest browser versions supported by mainstream operating systems. Retired operating systems and browsers, such as Windows XP and Internet Explorer 8 (IE8), are not supported. Anyone using a previous version of these browsers will be presented with a warning at login to encourage upgrading.

Matrix Desktop

Anyone using a desktop and choosing to use Internet Explorer (IE) on Windows Vista can upgrade as far as IE9. Windows 7 and Windows 8 can upgrade to IE11. Firefox and Chrome automatically update to their most recent versions regardless of underlying operating system. Matrix Desktop supports the following browsers:

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

Matrix Mobile

Matrix Mobile supports the following browsers:

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

If accessing via a smartphone, Matrix automatically takes you to the mobile version as it auto-detects the device you are using.

Contacts

Your Contacts will be converted at the beginning of parallel. If you do not edit them in Matrix, they will be updated throughout parallel.

If you edit the Contact in Matrix during the parallel period, that particular Contact will not be updated again. It will be assumed that the data in Matrix is up-to-date and should not be overwritten by what is in MLXchange/Fusion.

Contacts must have an email address to be converted. Emails are the unique identifier for contacts in Matrix. Below are some sample conversion scenarios.

1. **Mary Smith, mary@yahoo.com**
2. **Mary Smith, mary@gmail.com**
3. **M Smith, home phone 301-555-1212, mary@yahoo.com**
4. **M Smith, home phone 301-555-1212**
5. **Mary Smith, home phone 301-555-9999**
6. **Bob Smith, mary@yahoo.com, cell phone 301-555-2323**

Based upon the above, you will have the following Contacts in Matrix

1. Mary Smith, mary@yahoo.com, home phone, 301-555-1212, cell phone 301-555-2323
 - a. The conversion process will merge records 1, 3 and 4. Record 6 will also merge due to the email address match.
2. Mary Smith, mary@gmail.com

Record 5 will not convert due to an email address not existing.

Contacts must have a first and last name. If either the first or last name is missing, the email address will be placed in the missing field. During the parallel period, verify the contacts that exist in MLXchange/Fusion and enter any that you may need moving forward into Matrix. Remember, you will need a unique email address for each person entered.

To Do: Review Contacts - make sure all your Contact information converted correctly. Edit your Contacts as needed to add additional information that may be in Matrix that was not in MLXchange/Fusion.

- Click on **My Matrix, Contacts** to view your Contacts
- Click on the **arrow** to the left of their name to get the editing options.
- Click on **Edit Contact** if you need to update someone.
- A pop-up will appear with a few pieces of information. If you need to see more information, click on **Show All Fields** to see all the pieces of information about your Contact.
- Click on **Save** when finished.

You can also Add a Contact or Delete a Contact once you are in the Contacts section.

The Contacts, Auto-Email and Portal features of Matrix are integrated with each other. Make sure you read the sections on Auto-Email and Portal to understand more about how they work together.

Saved Searches

Your Saved Searches will be converted at the beginning of parallel. If you do not edit them in Matrix, they will be updated, if needed, at cutover. Any new Saved Searches added in MLXchange/Fusion during the parallel period will be added to Matrix at cutover.

Your Auto-Emails are imported as Saved Searches, but they are not 'turned on' to send emails to your customers. You will need to do this manually. Instructions for this are further down in this document.

If you edit Saved Searches in Matrix during the parallel period, that particular Saved Search will be preserved at cutover. It will be assumed that the data in Matrix is up-to-date and should not be overwritten by what is in MLXchange/Fusion.

All saved searches that have been imported are marked with **(Imported)**. The searches where all search criteria could not be converted are marked with **(Imported*)**. It is recommended to check each of your Saved Searches to see if you need to modify the criteria. Data is stored in Matrix in a slightly different manner and there are many more options available to you for searching. Also, some fields were moved or removed from the system which would cause your Saved Search to have **(Imported*)**.

Any search that was used for an auto-email will have a plus sign at the beginning **(+Imported)**. You will need to enable these as auto-emails. See the auto-email section for more on how to do this.

To Do: Edit Saved Searches - It is recommended to check each of your Saved Searches to see if you need to modify the criteria.

- Click on **My Matrix, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name. The Criteria is shown below the option buttons.
- Click on **Criteria** to go to the Search screen if you need to modify.
- Click on **Save** after you've made any modifications.

To Do: Connect Saved Searches to Contacts - If your Saved Search or Auto-Email Saved Search is connected to a Contact, it should have converted. However, we recommend you make sure each Saved Search is connected to the proper Contact. A Saved Search does not have to be connected to a Contact, but it's obviously helpful in many situations.

- Click on **My Matrix, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the **arrow** in the Contact box to select the appropriate Contact.
- Click on **Save**.

To Do: Set up My Favorite Searches – My Favorite Searches appears on the Home page of Matrix. You can enable up to 10 searches to appear on the Home page.

- Click on **My Matrix, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- **Check the box** to Enable as Favorite Search on Home tab.
- Click on **Save**.

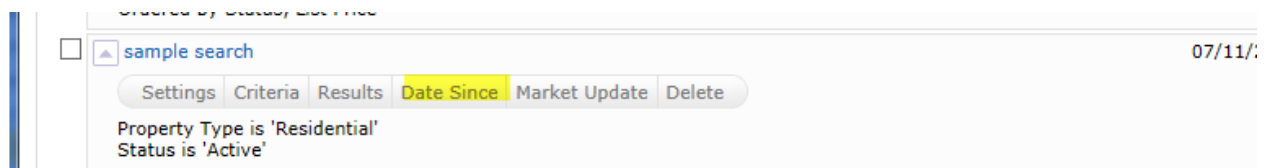
Saved Speed Bar Searches

This is a unique feature in Matrix that was not available in MLXchange/Fusion. You do not need to look at this when first setting things up, but you may need to look at it in the future. Speed Bar Search is discussed elsewhere in this document.

NOTE: There is no limit to the number of Saved Searches or Speed Bar Searches allowed.

Date Since in Saved Searches

Another unique feature with Matrix is the ability to execute a “date since” search on a saved search. This is similar to the hotsheet feature to see what has occurred since the last time you executed the search. To use this feature, click on the saved search under My Matrix and used the Date Since button shown below.



Personal/Marketing Information

The information from your membership system will be in the listings in the system. The settings below will not change how information will appear in a listing. Contact your Association if you need to change your information as it appears in your listings.

Some features in this document will use personal information that is in the system for marketing purposes. For instance, it personalizes your headers or footers on reports. This personal information is not part of your Association’s membership system.

Before you start using Matrix, enter all of your personal information first. This will make it so other features will properly work when you turn them on.

To Do: Email Signature – Set this up so you can turn on Auto-Emails and use other email functions.

- Click on **My Matrix, My Information, Email Signature**.
- Edit how you want your signature to appear and click on **Save**.

You can only insert photos for your signature that are used with your Print Header, CMA Cover Page or Portal Greeting.

To Do: Information – This section contains information used on the Portal, in headers and footers as well as other areas of Matrix. You can override what is in your membership system for first name, last name and email address. However, it is highly recommended to contact your MLS to change your membership information at the source for those pieces of information.

- Click on **My Matrix, My Information, Information.**
- Edit the various pieces of information and click on **Save.**

To Do: Header & Footer – This is the header and footer that can appear when printing Reports as well as on the Portal.

- Click on **My Matrix, My Information, Header & Footer.**
- If you want to use one of the templates provided, Click on the **selection bubble** to the left of the one desired.
- Click on **Preview.**
- Choose **Select a Different Package** if you want to change the template.
- Upload a Photo of yourself, if desired.
- Click on **Save.**
- **OPTIONAL** - If you want to create a Custom Header/Footer
 - Click on the **selection bubble** to the left of Upload Custom Header/Footer.
 - Click on **Upload Images.**
 - Upload images, choose sizing and coloring as desired.
 - Click on **Save.**

Note: For best results, the optimum image size for an agent photo is 66 x 79 pixels and the header/footer banner is 1200 x 85.

To Do: Portal Information – This is used with your Portal. The information available includes the items you edited above on the **Information** page. If you do not see many items to choose from, you may need to first edit them on the **Information** page.

- Click on **My Matrix, My Information, Portal Information.**
- Modify information as needed.
- Click on **Save.**

Note: For best results, the optimum image size for a portal photo is 100 x 100

To Do: Mobile Header – This is a slightly different header used for your Mobile Portal, since not as much information can fit.

- Click on **My Matrix, My Information, Mobile Header.**

- Modify information as needed. It gives the option to add a different photo due to the size of the mobile header vs. a regular header.
- Click on **Save**.

Note: For best results, the optimum image size for a mobile photo is 60 x 60

To Do: CMA Cover Sheet – This is used with your CMA and allows you to enter extra contact information just for a CMA. The photo for the CMA Cover Sheet can be a picture of a house or something real estate related. It is not intended for it to be a photo of you, but it can be if desired.

- Click on **My Matrix, My Information, CMA Cover Sheet**.
- Modify information as needed.
- Click on **Save**.

Note: For best results, the optimum image size for a portal photo is 80 x 120

Auto-Emails

Since emails are already being sent from MLXchange/Fusion, Auto-Emails are not being sent from Matrix until you activate them. Your Auto-Emails have been imported as Saved Searches, but need to be manually activated. Any search that was used for an auto-email will have a plus sign at the beginning of the name (**+Imported**).

If you need help with your Saved Searches, please see the Searching section, further below in this document, for tips.

It is recommended for you to do the following before enabling any auto-emails:

- Read through the **Portal Quick Start Guide** (hyperlink below). This document is for your customer, but make sure you are familiar with it. This will allow you to understand how the Portal experience works for your customers and answer any questions they may have.
<http://www.marketlinx.com/download/pdf/Portal%20Quick%20Start%20Guide%20CAN.pdf>
- Tell your customers the MLS system is changing so they will be aware of the change in the look and feel of the information they will see and receive. Tell them to whitelist/allow emails from the new URL of the system (<http://matrix.onregional.ca>). Include the link to the **Portal Quick Start Guide** above. This will help them understand the changes.
- Personalize your Portal Information. Build it out so your customers have a pleasant experience and it has your personal branding on it.
- Configure your Header/Footer options. The Header appears on your Portal and provides you to brand the Portal site.
- Configure your Email Signature. This will enable your customers to see the information is coming from you along with your contact information.
- Customize your Welcome Letter that is sent when auto-emails are activated.

- If you have a vanity website/domain name pointing to your old system's portal, configure it to point to the new system. See the Agent Web Pages and Vanity Websites section below on how to do it.




When you turn on an Auto-Email in Matrix, you should turn it off in your old system so your customer does not receive two emails from you. This will reduce confusion as to which email they should be reading.

To Do: Enable Auto-Emails – Follow the steps below to setup auto-email for your customers and clients.

- Make sure you have reviewed your **Contacts** as indicated previously.
- Make sure you have reviewed your **Saved Searches** as indicated previously.
- Make sure you have set up your **Email Signature** as indicated previously.
- Click on **My Matrix, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the link at the top that says **Turn this Saved Search into an Auto Email**
- Edit the information for the Auto-Email.
 - If you choose Daily as the option for sending, there is an AM and a PM option. The AM emails are sent at 8:00 a.m. The PM emails are sent at 6:00 p.m.
- Click on **Save**.

Note: A maximum of 250 records are returned with a search associated with Auto-Emails. Please make sure the Saved Searches that are enabled do not return more than 250 listings. If the search returns over 250 listings, you will be prompted to edit the Saved Search.

Once an Auto-Email is setup, the email will be sent to your customer. The status of your Auto-Email will be one of the following:

-  Auto Email is Active, but the Contact has not yet logged in and activated their portal.
-  Auto Email is Active and has been accessed by the Client.
-  Auto Email is disabled by client or agent.

A customer can unsubscribe from just one email, from all emails from one agent, or from all emails from the MLS. If your customer is not receiving an email, make sure they did not unsubscribe from your emails or from the MLS emails.

If an auto-email has been setup and it returns zero listings for 90 days, it will be disabled by the system. Also, if an auto-email is not opened by your client, it will be disabled after 30 days.

Agent Web Pages and Vanity Websites

If you do not have a website, no worries! Matrix allows agents to have a web presence without developing their own website. These are known as Agent Web Pages. If you have your own domain name (vanity website), you can redirect your domain name to Matrix' Agent Web Page. However, you do not need a vanity website to use an Agent Web Page. A URL will be provided that you can give you clients and customers if you don't have a vanity website.

- Click on **My Matrix, My Information, Agent Webpage**.
- **Enable** the Agent Web Page.
- Enter the **Web Page URL**.
 - If you do not have a vanity domain, you will use this URL for your customers. Choose something that is short but identifies you/your page.
 - If you do have a vanity domain, you will provide this URL to your domain service to redirect your vanity name to it.
- Create your **Homepage Content**.
- Choose the **Map Area** option desired.
- Fill in the **Other Options** section, if desired.
- If you have a vanity domain, add it under **Additional Domains**. This will be used for security purposes so we can validate the sites pointing to your Agent Web Page.
- Click on **Preview**. Make changes as needed.
- Click on **Save**.
- **Notify your domain registrar** if you have a vanity website.

If you have an existing vanity website, you can replace the information with your domain registrar any time after parallel begins. You must do it before cutover or your website will no longer operate correctly.

Portal

The Portal is a feature of Matrix that allows you to interface with your clients and customers. The information your customers see on the Portal is real-time.

Below is a link to a document that you can give to your customers. It explains how to use the Portal from their standpoint.

<http://www.marketlinx.com/download/pdf/Portal%20Quick%20Start%20Guide%20CAN.pdf>

It is recommended for you to read through the document too, so you are familiar with how the Portal experience works for your customers.

Instructions on how to edit your Portal Information under My Matrix were provided above. Make sure you complete this section.

A Portal is available for each of your customers. To manage the information for each customer, go to the Contacts section under My Matrix.

- Click on **My Matrix, Contacts** to view your Contacts
- Click on the **arrow** to the left of their name to get the editing options.
- Click on the **Open Portal** option to see what they see.
- While looking at the Contact information, you can see the activity of your customer on the Portal -
 - Last Portal Visit
 - Listing Notes
 - Favorites
 - Possibilities
 - Discards

Make sure you check your Contacts section on a regular basis if you are utilizing the Portal feature. This is your dashboard to see what your customer is interested in and how you might alter their auto-emails.

Contacts and Portal are integrated. If you change the status of your Contact to Inactive, it will disable their Portal. Also, if you delete your Contact, the Portal will no longer be available to them.

Saved Searches and Auto-Emails are also integrated with the Portal. Make sure you read the section on Auto-Emails to understand how certain features within the Portal will function. For instance, if an auto-email has been setup and it returns zero listings for 90 days, it will be disabled by the system and drop from the Portal.

The Discarded listings on the Portal are purged after a certain time period. If the listing was part of an auto-email, it will drop after 14 days. If it was part of a direct email from you, it will drop after 90 days.

Market Watch

Market Watch is available on the Home page to provide you a quick look at what changes have occurred with listings in the system. Below is an explanation of each Change Type.

- New - Listings that are new to the system (see time frame below).
- Back On Market – Listings that have moved from Deposit, Deposit – Continue to Show or any other Off-Market status.
- Price Decrease – Listings where a decrease in price occurred.
- Price Increase - Listings where an increase in price occurred.
- Active – CS – Listings that are Active, but are marked as continue to show.
- Active – NS – Listings that are Active, but are marked as do not show.
- Pending Sale – Listings that moved to the status of Pending Sale
- Closed - Listings that moved to the status of Closed.
- Cancelled – Listings that moved to the status of Cancelled.
- Expired – Listings that moved to the status of Expired.
- Suspended – Listings that moved to the status of Suspended.

There are three options from the Home page to quickly change your look at the market.

- Property Type – Used to switch between Residential, Commercial, etc.
- Timeframe – Used to switch between Today, 24 hours, 3 days and 7 days. In the past, New was always 7 days. Matrix allows more flexibility associated with the timeframe.
- Customize – Used to narrow the criteria instead of defaulting to all listings.

Hot Sheets

As with Market Watch, Hot Sheets are available from the Home tab of Matrix. Hot Sheets are searches that can use the Change Types in the system to provide quick information on what has happened recently in the market.

Below is an explanation of each Change Type.

- New - Listings that are new to the system (see time frame below).
- Back On Market – Listings that have moved from Deposit, Deposit – Continue to Show or any other Off-Market status.
- Price Decrease – Listings where a decrease in price occurred.
- Price Increase - Listings where an increase in price occurred.
- Active – CS – Listings that are Active, but are marked as continue to show.
- Active – NS – Listings that are Active, but are marked as do not show.
- Pending Sale – Listings that moved to the status of Pending Sale
- Closed - Listings that moved to the status of Closed.
- Cancelled – Listings that moved to the status of Cancelled.
- Expired – Listings that moved to the status of Expired.
- Suspended – Listings that moved to the status of Suspended.

By default, there is a Hot Sheet for each Property Type. To edit or add a Hot Sheet follow these steps.

- Click on **My Matrix, Settings, Hot Sheets**.
- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.

Or

- Click on **Customize** under **Hot Sheets** from the **Home** page.
- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.

To run a Hot Sheet, follow these steps:

- Choose the **Timeframe** desired –
 - Since Last Search – Since you logged into Matrix
 - New Only – Adds the Change Type of New only
 - 24 Hour – In the last 24 hours
 - Today – During the current day
 - 3 Day – In the past 3 days
 - 7 Day - in the past 7 days
 - Custom – allows you to choose any timeframe
- Click on the **Hot Sheet** desired.

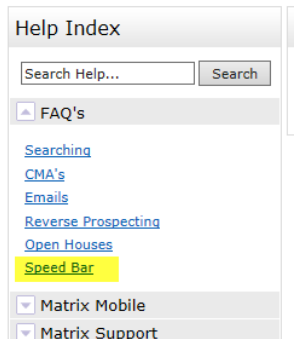
Note: There is a limit of ten (10) Hot Sheets that can be accessed from the Home tab of Matrix.

Searching

There are two ways to Search in Matrix. One is on a Search Screen and the other is with the Speedbar. You can create saved searches for both. Speedbar Saved Searches are for use within Matrix only. Saved Searches from a Search Screen can be attached to a Contact and setup as an Auto-Email, if desired.

Speedbar Search

Speedbar Search is for shortcut searching. This is where you will search by MLS Number. There is no need to be on a Search Screen to use the Speedbar. When in Matrix, click on the Help icon next to the Speedbar for tips on how to use it. Also, help is available from the Help tab under FAQ's.



One of the best ways to learn how to use the Speedbar is to watch what Matrix puts in the Speedbar when you do a regular search. The Speedbar will be filled in, even if you didn't use it. For instance, by searching Active, Residential listings in Avon, the Speedbar filled in the following.



Just like regular searches, Speedbar searches can be saved too. These use the slash ("/") to identify them from a non-saved Speedbar search.

Search Screens

Search Screens allow you to search by using all the various criteria in the system. This can include items such as select values for appliances and/or list price. Use the Search tab to access all the Search Screens created in the system. There are Search Screens for each of the Property Types, Open Houses, Agents and Offices.

Searching by Status

Searching by Status has the option to enter a Date Range or the Days Back to the criteria. Each Status has a date associated with it and the system is configured to know what date to look at. For instance, Active uses Listing Date, Expired uses Expiration Date, and Sold uses Closed Date.

If you are saving a search and want the dates to change as time progresses, you should use the Days Back feature. Here's an example:

- Scenario - Today is 7/1/2014. You want to save a search with various criteria for a client (enter city, price, beds, baths as needed). You only want to find listings brought on the market in the past 14 days. Both methods will return the same results on 7/1/2014.

- Using Date Range – To obtain the last 14 days of listings, you would enter 6/17/2014-7/1/2014. However, the Date Range method will continue to give you the same exact listings each time the search is run. On 7/2/2014, it is still looking at the 6/17-7/1 in the criteria.
- Using Days Back – To obtain the last 14 days of listings, you would enter 0-14. With Days Back, it provides a rolling timeframe associated with the search. It will always return the past 14 days of listings as time progresses.

Statuses changed slightly with the conversion. Please read the section below on Data Changes to find out more about it.

Searching by Property Type

With Matrix, searching by more than one property type at the same time is possible. There are also Property Sub Types that are available for each Property Type.

For more information on how the Property Types have change, read the section below on Data Changes.

Sale/Rent

With Matrix, Rental is not a property type, but a transaction type. Listings can either be sold or rented and a new field exists that gives you the option to look for both or either.

Since the majority of agents search for Sale listings, the default is usually set to Sale, but you can set and save your own defaults.

For more information on Transaction Type, read the section below on Data Changes.

Displays vs. Reports

In Matrix, there are Displays and Reports. There is a difference between the two. Below is what distinguishes the two from each other.

Displays

- HTML based information seen after you search in your browser.
- Printable from browser, but with no header.
- PDF version available with option for header to be added.

Reports

- PDF reports that are created with Crystal Reports that allow additional functionality over HTML.
- Different styling is possible and usually creates a more aesthetically pleasing view of the data.
- Aggregate functions available (i.e. Median, Average).
- Headers/Footers are included.

The displays and reports were created with your MLS's help. If you have feedback on what should be on a display or report, please contact your MLS with your suggestion.

Custom Reports

Your Custom Reports in MLXchange/Fusion will not be converted to Matrix. Unfortunately, the systems differ too much to make it possible.

There is no option to create full-page reports in Matrix. It is recommended to use Microsoft Word to create a report or flyer for your listings.

Please see Custom Displays to see what is available for you to create in Matrix.

Custom Displays

Your Custom Reports in MLXchange/Fusion will not be converted to Matrix. Unfortunately, the systems differ too much to make it possible.

In Matrix, you can create a Custom Display by using the following steps.

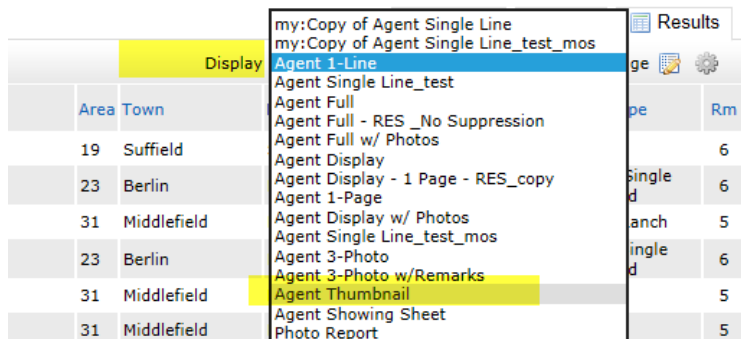
- Run a Search. The Agent Single-Line Summary is the default display.
- Hover over the icon to the right of “per page”. (It looks like a page of paper with a pencil on it.) It will say Manage Displays. **Click on the Manage Displays icon.**
- Choose **Save as a Copy.**
- Go to **My Matrix, Settings, Custom Displays.**
- A list of Custom Displays will be shown.
- Click on **Edit** and you can add or remove items as needed.

There is no option to create full-page reports in Matrix. It is recommended to use Microsoft Word to create a report or flyer for your listings.

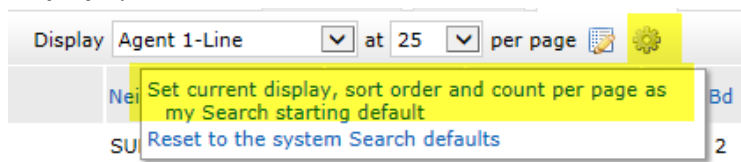
Setting a Default Display

When searching, the default display is the single-line summary. To change this to a different system display or one that you customized under Custom Displays, use the following steps.

- Run a Search. The single-line summary will be the default display.
- Choose the display desired, such as Agent Thumbnail, from the Display selection menu at the top of the single-line display.



- Select the **set default wheel** located to the right of the Display options. Choose the **Set Current Display** option.



- To return to the single-line display as your default, choose the Reset option instead.

CMA's

CMA's from your old system will not be converted to Matrix. Unfortunately, the way they are stored in the system makes this not possible. If you have CMA's you need from MLXchange/Fusion, we recommend you save each CMA as a PDF on your computer. Or, you can recreate the CMA with Matrix.

There is no limit to the number of CMA's you can have. CMA's with over 180 days of inactivity are purged from the system. Previously, this limit was 120 days.

To create a CMA, follow these steps:

- Click on **My Matrix, My CMA's**
- Click on **Start a CMA**
- You will be walked through the CMA Wizard. This will include the following items:
 - **Start** - Select a CMA Contact
 - **Pages** - Select the Pages for the CMA
 - **Subject** - Select a Subject Property
 - **Cover** - Edit the Cover Information
 - **Comparables** – Search for and add Comparables
 - **Map** - Review Map information
 - **Adjustments** - Make Adjustments to the comparables based upon the attributes of the listings.
 - **Pricing** - Review the Pricing section. Add in your **Suggested List Price** and **Notes**.
 - **View, Save, Print and/or Email** the CMA as needed throughout the process.

At times, some items in the Wizard may not be available. Certain Pages need to be selected for options to be available. For instance, if you have not chosen a Cover Page to print, the Cover option will not be available.

Teams

Matrix allows you to create and manage a formal team or allow someone to work with you occasionally for vacation coverage. Agents (or their assistants) may work on behalf of another agent. It is also possible to impersonate another agent.

Note: Matrix will only allow you to add someone to your team who has an Active Matrix ID on the system.

Impersonate Another Agent

- If an agent you work with added you to her team in Matrix and set you up to impersonate her, you would be able to do the following things:
Emails sent from Matrix would be sent from her name and email address, and would use her email banner and footer (if she had chosen one) and email signature.
- Print reports – any reports that are printed while impersonating another agent will have the information of the agent being impersonated in the “Courtesy of” information. In other words, the report will look as if it were printed by the agent that you are impersonating.
- Access another agent’s Matrix Contacts, Saved Searches (you cannot change her team settings)
When you send an email from Matrix while you are impersonating another agent, the name and email address in the “From” line will be highlighted in yellow. This is to call attention to the fact that you are sending that email as that agent. This means that to the client, the email will look exactly as if it came from the agent being impersonated.

Working on Behalf of Another Agent

If an agent you work with added you to his team in Matrix and set you up to work on behalf of him, you would be able to do the following things while working on behalf of him in Matrix:

- Emails sent from Matrix would be sent from your name and email address on his behalf, and would use your email banner and footer (if you have chosen one) and email signature.
- Print reports - any reports that you print while working on behalf of another agent will indicate that they were printed by you on behalf of the other agent.

- Access his Matrix Contacts, Saved Searches (you cannot change his team settings)

Adding Other Agents as Your Team Members

Each Matrix user that is added to your team will have full access to your Matrix account and can either “impersonate” you or “work on your behalf,” depending on the type of access you grant them.

How to Set Up a Team

Below are the steps on how to setup a team in Matrix.

- Click on **My Matrix, Settings, Team Settings**.
- Click the link **Click here to create a Team**.
- Click **Click here to create a Team** again on the next screen.
- Type in the agent ID for the person you want to add to your team. If you do not know the ID, you can find it through an Agent search.
- Select whether you want this colleague to **Impersonate** you or **Work on Behalf** of you.
- Click **Add**.

After adding your first team member, you will come to the main Team Settings screen. Here you can control the following items.

- Add additional team members.
- Delete team members
- Edit team members status (impersonate or work on behalf).
- Name your team.
- Set yourself up to either impersonate or work on behalf of the team.
- Allow team members the option of switching between their own names and the Team name when printing and emailing to Team Contacts.
- Disable the team function.

After enabling the Team function, you will be alerted to it on the Home page each time you login.

When one of your team members logs in, they can switch from their own individual login to the Team login by clicking on their name in the upper-right corner of the screen to open the select popup. There he can click to select the team name (or your name if you did not create a team name).

They can now see in the upper-right (and highlighted in yellow on the Home page) that they are working as the team. When clicking on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to the Team’s items. When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone. If they are set to impersonate you, they have the same choice except that if they select the Team, it will use your email address, not theirs.

To leave working as the team and go back to working as yourself, click the “Working as” link in the upper right of the screen and click to select your own name.

Input

Matrix allows you to input listings along with Photos, Supplements and Open Houses.

Roles are assigned to each person using Matrix. An agent can edit any of their own listings or where they are the Listing Agent or Co-Listing Agent. An office manager can edit listings within their office. A broker can edit listings at the firm level, if needed.

Photos

With Matrix, when adding a listing there is a status of Incomplete. The incomplete status cannot be seen when searching, only when using the Input portion of Matrix. This status allows you to be able to add photos prior to submitting the listing to the system.

Previously, there was a limit of 20 photos per listing. With Matrix, the limit will be 50.

When entering a Photo with Matrix, you can enter a Caption. This can be a title, such as "Kitchen", or a description about the photo, such as "View from back deck overlooking Lake Smith"

Supplements/Documents

Documents are called Supplements in Matrix, as they do not need to be a Word document. All of your documents from MLXchange/Fusion converted into Matrix along with your listings. However, there was no "Supplement Type" in MLXchange/Fusion and there is in Matrix. Here are the types in Matrix:

Value
Addendum
Brochure/Feature Sheet
Floor Plan
Green Certification/Energy Efficiency Document
Inspection Report
Interest Bearing Trust
Lead-Paint Disclosure
Mold Disclosure
Other
Schedules
Survey

All converted documents that do not match the above types will have a Supplement Type = Other. Once Matrix Input is available at cutover, you can edit the Supplement Type to be one of the above items.

Supplements can be any file type (.DOC, .PDF, etc.). However, it is recommended you upload documents in a PDF format. This makes the document read-only and does not allow anyone else to edit your document.

Supplements in Matrix can have a file size of 10 MB. There is a limit of 5 supplements per listing. All supplements are only visible within Matrix. They are not visible to the consumer.