

# **Matrix Advanced User Manual**

### www.srar.com

<u>www.CRMLSMobile.com</u> (for small screen devices like Smartphones)

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**Note:** More Manuals & Video Tutorials are at <u>www.SRAR.com/Matrix</u> click "Training & Training Manuals" or "MLS Training Materials"

Mar-2011

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## Introduction

The Matrix Platform is the industry's top rated MLS platform offering an ultra-modern and flexible environment. This manual will guide you through creating a CMA, contact and prospect management, and using carts in the Matrix Platform. Follow the steps in these sections to get started.

- Disabling Pop-up Blockers
- Accessing the Matrix Platform

### **Disabling Pop-up Blockers**

Your computer may have an Internet browser or security software that blocks Internet pop-ups. Matrix products utilize help screens and other features that may be blocked by some pop-up blockers. Follow the steps below to allow pop-ups from Matrix products in Internet Explorer.

### Note:

For information on allowing pop-ups from Matrix products in other Internet browsers or security software, refer to your application's documentation.

- 1. In Internet Explorer, select Tools > Pop-up Blocker > Pop-up Blocker Settings.
- 2. Add the following websites to the Allowed sites list:
  - http://srar.com
  - http://realist2.firstamres.com (Realist Tax)
  - http://tm.marketlinx.com (Smart Trac/Smart Fax)

### **Accessing the Matrix Platform**

Follow the steps below to access the Matrix Platform.

- 1. Open your web browser and go to http://www.srar.com
- 2. Click the Login to CRISNetMLS Matrix button.



3. Enter your SCOUT Login information and click Login.

You see the SRAR Matrix Home screen.

## **Creating a CMA Report**

A CMA (Comparative Market Analysis) report is a compilation of current and historical property pricing history information used to establish pricing recommendations for a subject property. Follow the steps in these sections to create a Quick or Presentation CMA report:

- Searching for Comparable Properties
- Mapping Comparable Properties
- Generating a Presentation CMA
- Generating Quick or Statistical CMA Reports
- Exporting Listings for Other CMA Programs

### **Searching for Comparable Properties**

When searching for comparables, you should keep your search criteria and location criteria as close to your subject property as possible. Follow the steps below to search for comparables:

- 1. Click the Search tab.
- 2. Click the **Detail** link for the type of property you're analyzing. In this example, we will be searching for residential properties.

|                   | Home             | Search           | My Matrix    | Add/Edit          | Finance                 | Roster          | Realist Tax | Links | Help | Logout |
|-------------------|------------------|------------------|--------------|-------------------|-------------------------|-----------------|-------------|-------|------|--------|
| Residential       | -                |                  |              |                   |                         |                 |             |       |      |        |
|                   |                  |                  |              | 0                 |                         |                 |             |       |      |        |
| ☆ Residential     | • <u>Address</u> | • <u>Today's</u> | New Listings | • <u>Create Y</u> | <u>Cart:</u><br>our Own | <u>My Resid</u> | ential (2)  |       |      |        |
| 🇟 Residential II  | ncome            |                  |              |                   |                         |                 |             |       |      |        |
| Detail Quick MLS# | Address          | • <u>Today's</u> | New Listings | • <u>Create Y</u> | our Own                 |                 |             |       |      |        |

#### 3. Click Map Search.

| Status:                   | City:                                | List Price:                           | Status Date:    |
|---------------------------|--------------------------------------|---------------------------------------|-----------------|
| Active                    | 🕜 Pomona                             | 0                                     | 0               |
| Pending Sale              | more (click)                         | Current Dricou                        | CMA Status Date |
| Backup Offer —            |                                      |                                       |                 |
| Closed Sale               |                                      | v                                     | v               |
| Expired 💽                 |                                      | Bedrooms:                             | Baths Total:    |
| ⊙ Or ○ Not                | ⊙ Or ⊂ Not                           | 0                                     | 0               |
| Type                      | Area:                                | Caffe                                 | Lat Caft        |
| Single Family Residence   |                                      | a a a a a a a a a a a a a a a a a a a |                 |
| Condominium               | 1 - Belmont Shore/Park.Naples.Mar    | v                                     | v               |
| Townhouse                 | 2 - Belmont Heights, Alamitos Heig 🗖 | Year Built:                           | Senior Com:     |
| Manufacture 433           | 3 - Eastside, Circle Area            | 2                                     | 2 -             |
| Manufacture Without 433 💌 | 4 - Downtown Area, Alamitos Beach 💌  | -                                     |                 |
| ⊙ or C Not                | ⊙ or ⊂ Not                           | ate or det                            | Mar Barla       |
| Church and Although a de  | Puilder's Tract Code                 | Zip Code:                             | мар воок:       |
| Deteched                  |                                      | v                                     | v               |
| Attached                  |                                      | APN:                                  | Legal Tract #:  |
| Attached                  |                                      |                                       | 2               |

4. Enter the subject property's address in the available fields, then click Locate.



5. Use the draw tools to limit your search area to a specific distance. In this example, we will be using the **Draw Radius** tool.



- 6. Click **OK** to save your Map Area and return to the Detail search screen.
- 7. Select the listing Status for your comparables in the Status field.
- 8. Enter the number of days back to search in the CMA Status Date field. For more information on the CMA Status Date field, click the **?** icon next to the field. Suggestion: <u>0-180 for CMA Status Date</u>

| tatus:                    | City:                              | List Price:    | Status Date:                          |
|---------------------------|------------------------------------|----------------|---------------------------------------|
| Active                    | 🕜 Pomona                           | 0              | 0                                     |
| Pending Sale              | more (click)                       | Current Duiner | CMA Chabus Data                       |
| Backup Offer —            |                                    |                | CMA Status Date:                      |
| Closed Sale               |                                    | v              | v                                     |
|                           |                                    | Bedrooms:      | Baths Total:                          |
| ⊙ Or © Not                | ⊙ Or ⊂ Not                         | 0              | 0                                     |
| vpe:                      | Area:                              | Soft:          | Lot Soft:                             |
| Single Family Residence 🔺 |                                    | 0              | 0                                     |
| Condominium               | 1 - Belmont Shore/Park,Naples,Mar  | -              |                                       |
| Townhouse                 | 2 - Belmont Heights, Alamitos Heig | Year Built:    | Senior Com:                           |
| Manufacture 433           | 3 - Eastside, Circle Area          | 0              |                                       |
|                           | 14 - Downlown Area, Alamitos Beacr |                |                                       |
| ⊙ Or ⊂ Not                | ⊙ Or ⊂ Not                         | Zip Code:      | Map Book:                             |
| tructure Attached:        | Builder's Tract Code:              | 0              | 0                                     |
| Detached                  |                                    | ADNI           | Logal Tract #1                        |
| Attached                  |                                    |                | a a a a a a a a a a a a a a a a a a a |

9. Select additional search criteria as necessary. Do not select an Area or City, the Map Search will automatically limit the search area based on the area you specified in the Map Search.

### Note:

For a list of special characters allowed for search fields, Additional Search Options

If you need help entering search criteria, click the ? icon next to the field you need help with.

10. Click the **Search** button.

| Status:   | City:   | List Price:                    | Status Date:                            |
|---|---|--------------------------------|---|
| Active     Pending Sale     Backup Offer     Closed Sale     Expired              | Pomona<br>more (click)  | Current Price:                 | CMA Status Date:                        |
| € or € Not  | • or C Not  | Beuroonis:                     | Datiis Total:                           |
| Type:<br>Condominium<br>Townhouse<br>Manufacture 433<br>Manufacture Without 433 ▼ | Area:<br>1 - Belmont Shore/Park,Naples,Mar<br>2 - Belmont Heights, Alamitos Heigl<br>3 - Eastside, Circle Area<br>4 - Downtown Area, Alamitos Beact | Sqft:<br>@<br>Year Built:<br>@ | Lot Sqft:<br>C<br>Senior Com:<br>C<br>T |
| • Or C Not  | ● Or ○ Not  | Zip Code:                      | Map Book:                               |
| Structure Attached:   | Builder's Tract Code:   | 0                              | 0                                       |
| Detached<br>Attached  |   | APN:                           | Legal Tract #:                          |
| - temp  | Map Search: Map Area Selected c   | lear Map                       |   |

Refer to these sections to map the comparables, generate the CMA report, or export listings for analysis in another CMA programs:

- Mapping Comparable Properties
- Generating a Presentation CMA
- Generating Quick or Statistical CMA Reports
- Exporting Listings for Other CMA Programs

### Additional Search Options

Refer to the table below for a list of special characters allowed for search fields.

| Special<br>Character | Description  | Example  |
|----------------------|--|--|
| +                    | Greater than or equal to:<br>Allows you to search for values that are<br>greater than or equal to the value you<br>entered. When using the + character, it<br>must follow the value you enter. | <i>Bathrooms: 3</i> +<br>Finds all listings that have 3 or more<br>bathrooms.  |
| _                    | Less than or equal to:<br>Allows you to search for values that are<br>less than or equal to the value you<br>entered. When using the – character, it<br>must follow the value you enter.       | <i>Bathrooms: 4-</i><br>Finds all listings that have 4 bathrooms or less.  |
|                      | Range:<br>Allows you specify a numeric range.  | <i>List Price: 150000-200000</i><br>Finds all listings with a list price ranging<br>from \$150,000 to \$200,000.   |
| 3                    | <b>Either/Or:</b><br>Allows you to enter multiple values in a single field.  | <i>Type: SFR, CONDO</i><br>Finds all listings that are condominiums or single-family residences.   |
| *                    | Wildcard:<br>Searches for unknown letters and/or<br>numbers.   | Street Name: *Park<br>Finds all listings that are located on a<br>street that ends with the word Park.<br>Street name Park*<br>Finds all listings that are located on a<br>street that begins with the word Park.<br>Property Description/Office Comments:<br>*key word*<br>Finds all listings with the "key word" in the<br>property description or office comments.<br>Use commas to separate multiple key<br>words. |
| !                    | <b>Exclude Selections:</b><br>Will exclude listings that contain the<br>excluded search criteria. When using the<br>! character, it must precede the value you<br>enter.                       | Year Built: !1960<br>Excludes all listings that contain<br>properties that were built in 1960.   |

### **Mapping Comparable Properties**

Follow the steps below to display comparable properties on a map. You can also print or save the mapped properties as a PDF for your client.

- 1. Click the checkbox next to the comparables you want to map.
- 2. Click the Map button.

| les | idential • Det   | tail · Quick · M                 | 1LS#                       |                     |        |      |              |               |         |          |       |         |               |      |
|-----|--|----------------------------------|----------------------------|---------------------|--------|------|--------------|---------------|---------|----------|-------|---------|---------------|------|
|     |  |                                  |                            | O A P B S           | SFR    |      |              | ন 🤌           | Other C | riteria  |       |         |               |      |
| 1-2 | 20 of 20 · Ch  | ecked <b>20</b> · <u>Un-c</u>    | c <mark>heck all 20</mark> |                     |        |      |              | Display Agent | 1 Line  | 🗾 at     | 25 💌  | per pag | e · View as 📢 | 8    |
| re  | vious • Next •   | ·[1]                             |                            |                     |        |      |              |               |         |          |       |         |               |      |
| 7   | ML#  | S Type                           | St#                        | St Name             | City   | Area | MB#          | L/S Price     | Br/Ba   | YrBlt    | Sqft  | LSqft   | DOM/CDOM      | 1    |
| 7   | <u>S643547</u>   | P SFR/A                          | 247                        | ALDERWOOD WY        | RVSD   | 252  | 716D5        | \$195,000     | 4/2.00  | 1988/ASS | 1,540 | 12,632  | 1/1           | 12   |
| 7   | <u>×10116881</u>   | S SFR/A                          | 6854                       | Blackwood ST        | AMAD   | 28   |              | \$2 🕹         | 3/3.00  | 1988     | 1,690 | 12,197  | 31/31         | - 27 |
| ~   | K214258  | S SFR/A                          | 617                        | PEACHWOOD PL        | RVSD   | 252  | <u>716E5</u> | \$214,000     | 3/3.00  | 1992     | 1,970 | 11,761  | 0/0           | - 3  |
| 7   | A09108177  | S SFR/A                          | 6940                       | Blackwood ST        | RVSD   | 252  | 716D4        | \$265,000 🛧   | 4/3.00  | 1988     | 1,867 | 12,196  | 265/265       | Ň    |
| 7   | <u>1289740</u>   | S SFR/A                          | 261                        | GRACEFIELD WAY      | RVSD   | 252  | 716D5        | \$287,500 🕹   | 4/2.75  | 1988     | 2,272 | 8,712   | 20/20         | 3    |
| 7   | <u>I10086697</u>   | S SFR/A                          | 438                        | Pinetree WY         | RVSD   | 252  | <u>716E4</u> | \$315,000 🛧   | 5/3.00  | 1989     | 2,658 | 12,196  | 116/116       | ij   |
| 7   | <u>1312794</u>   | S SFR/A                          | 6826                       | LAURELBROOK         | RVSD   | 252  | 716D4        | \$320,000 🕹   | 5/3.00  |          | 2,293 |         | 73/73         |      |
| 7   | <u>1299133</u>   | S SFR/A                          | 6811                       | IRONWOOD DR         | RVSD   | 252  | 716E4        | \$320,000 🕹   | 4/2.00  | 1991     | 2,305 | 12,632  | Z/Z           |      |
| 7   | K305159  | S SFR/A                          | 6983                       | MISSION GROVE       | RVSD   | 252  | 716E5        | \$325,000 🛧   | 4/3.00  | 1988     | 1,900 |         | 4/4           | - 31 |
| ~   | <u>I10059486</u>   | S SFR/A                          | 650                        | Lakewood DR         | RVSD   | 252  | 716E4        | \$334,900     | 3/3.00  | 1993     | 1,970 | 23,087  | 40/40         | - 28 |
|     |  |                                  |                            |                     |        |      |              |               |         |          |       |         |               |      |
| P   | revious • Next   | t • [1] • <u>Top</u> • <u>Bo</u> | ottom                      |                     |        |      |              |               |         |          |       |         | 🗐 Carts       | 5    |
| ξ.  | 111-0111-01  | G GERIA                          |                            |                     | RVED   | -    |              |               |         |          |       |         |               |      |
| 0   | Revise 1   | 🖼 Email 🔜 R                      | eport 🖪 CM/                | A 🚺 Map 🖬 - Stats 🖡 | Save A |      |              |               |         |          | < N   | arrow D | iscard Expor  | t    |
|     | the second s |                                  |                            |                     |        | -    |              |               |         |          |       |         |               |      |



|   | $\overline{\mathbf{v}}$ | ML#       | L/S Price   | Street Address   |
|---|-------------------------|-----------|-------------|------------------|
| I | ~                       | F1861967  | \$700,000   | 5510 WILBUR AV   |
| 2 | 5                       | F11006036 | \$759,000   | 4520 Callada PL  |
| 3 | •                       | F1862386  | \$765,000   | 5355 VANALDEN AV |
| 4 | •                       | F11027336 | \$700,000   | 5431 Rhea AV     |
| 5 | ~                       | 09350481  | \$1,200,000 | 4967 BILMOOR AV  |
| 6 | 1                       | F1864762  | \$790,000   | 19230 SANTA RITA |
| 7 | •                       | F11011986 | \$890,000   | 5500 Corbin AV   |
| 8 | •                       | F1854540  | \$982,040   | 4608 LA BARCA DR |

 Click the **Print** button and follow the prompts on the screen to print a copy of the map. You'll see a map similar to this one which will print with your Client Header on top: (My Matrix, Settings, Header... if you haven't done this yet.)

### Note:

To get driving directions to each of the comparable properties, click Get Directions.

- 4. When you're done mapping comparable properties, click **Back to Results**, then see one of the following sections:
  - Generating a Presentation CMA
  - Generating Quick or Statistical CMA Reports
  - Exporting Listings for Other CMA Programs

### **Generating a Presentation CMA**

Follow the steps below to create a presentation CMA for your client.

1. From the Search Results page, select the comparable properties you want to include in the presentation CMA report.

#### Note:

You can select up to 50 listings for your CMA report.

Listings with an asterisk (\*) next to a status of Pending (P) or Closed (S) have been Auto Sold by the Matrix Platform and may contain inaccurate information. Auto Sell is a Status Violation and takes effect 5 days after the Estimated COE Date on a listing that is in Pending or Backup Status. When a listing Status is not changed or updated prior to the Estimated COE Date it goes to Auto-sell with a status of P\*. If the listing is not updated after 5 days of the Estimated COE Date it goes to a status of S\*. Prior to each time frame Matrix will email all responsible parties (Agent, Broker, and Association/Board) of the inaccurate information and the member may be subject to a fine.

2. Click the CMA button.

| <                       |                  | RIX Home S                       | Search My M | latrix Add/Edit I | inance Ro | ster | Realist Ta>  | : Links Help  | Logou   | t        |                       |         |               |    |
|-------------------------|------------------|----------------------------------|-------------|-------------------|-----------|------|--------------|---------------|---------|----------|-----------------------|---------|---------------|----|
| Res                     | idential • De    | tail • Quick • ML                | S#          |                   |           |      |              |               |         |          |                       |         |               |    |
|                         |                  |                                  |             | 🚱 A P B           | S SFR     |      |              | ন 🔎           | Other C | riteria  |                       |         |               |    |
| 1-:                     | 20 of 20 · Ch    | ecked <b>20</b> · <u>Un-ch</u> e | eck all 20  |                   |           |      |              | Display Agent | 1 Line  | 💽 at     | 25 💌                  | per pag | e · View as 4 | 5  |
| Pre                     | vious • Next     | [1]                              |             |                   |           |      |              |               |         |          |                       |         |               |    |
| 1                       | ML#              | S Type                           | St#         | St Name           | City      | Area | MB#          | L/S Price     | Br/Ba   | YrBlt    | Sqft                  | LSqft   | DOM/CDOM      | V  |
|                         | <u>S643547</u>   | P SFR/A                          | 247         | ALDERWOOD WY      | RVSD      | 252  | 716D5        | \$195,000     | 4/2.00  | 1988/ASS | 1,540                 | 12,632  | 1/1           | Y  |
| ~                       | <u>×10116881</u> | S SFR/A                          | 6854        | Blackwood ST      | AMAD      | 28   |              | \$2 🕹         | 3/3.00  | 1988     | 1,690                 | 12,197  | 31/31         | Y  |
| $\overline{\mathbf{v}}$ | <u>K214258</u>   | S SFR/A                          | 617         | PEACHWOOD PL      | RVSD      | 252  | <u>716E5</u> | \$214,000     | 3/3.00  | 1992     | 1,970                 | 11,761  | 0/0           | Y  |
| •                       | A09108177        | S SFR/A                          | 6940        | Blackwood ST      | RVSD      | 252  | 716D4        | \$265,000 🛧   | 4/3.00  | 1988     | 1,867                 | 12,196  | 265/265       | Ν  |
| ☑                       | 1289740          | S SFR/A                          | 261         | GRACEFIELD WAY    | RVSD      | 252  | 716D5        | \$287,500 🕹   | 4/2.75  | 1988     | 2,272                 | 8,712   | 20/20         | N. |
| •                       | <u>110086697</u> | S SFR/A                          | 438         | Pinetree WY       | RVSD      | 252  | <u>716E4</u> | \$315,000 🛧   | 5/3.00  | 1989     | 2,658                 | 12,196  | 116/116       | Ν  |
| $\overline{\mathbf{v}}$ | 1312794          | S SFR/A                          | 6826        | LAURELBROOK       | RVSD      | 252  | <u>716D4</u> | \$320,000 🕹   | 5/3.00  |          | 2,293                 |         | 73/73         | Y  |
|                         | <u>1299133</u>   | S SFR/A                          | 6811        | IRONWOOD DR       | RVSD      | 252  | <u>716E4</u> | \$320,000 🕹   | 4/2.00  | 1991     | 2,305                 | 12,632  | Z/Z           | Ν  |
| ☑                       | K305159          | S SFR/A                          | 6983        | MISSION GROVE     | RVSD      | 252  | <u>716E5</u> | \$325,000 🛧   | 4/3.00  | 1988     | 1,900                 |         | 4/4           | N. |
| ☑                       | <u>110059486</u> | S SFR/A                          | 650         | Lakewood DR       | RVSD      | 252  | <u>716E4</u> | \$334,900     | 3/3.00  | 1993     | 1,970                 | 23,087  | 40/40         | Y  |
|                         |                  |                                  |             |                   |           |      |              |               |         |          |                       |         |               |    |
| P                       | revious • Next   | [1] Top Bott                     | iom neta    |                   |           |      |              |               |         |          |                       |         | 🛒 Carts       |    |
| E                       |                  | GI GERBAN                        |             | الله الرجوح الله  | RVED      |      |              |               |         |          |                       |         |               |    |
| (                       | Revise 1         | 🜃 Email 📄 Rep                    | ort E CMA   | 💹 Map 🚺 Stats     | 🔚 Save As |      |              |               |         |          | <ul> <li>N</li> </ul> | arrow D | iscard Export |    |
|                         |                  |                                  |             |                   |           | ~    |              |               |         |          |                       |         |               |    |

3. You see the CMA wizard. Select a contact in the Select Contact Name drop-down list.

| Start Pages Su                                  | ibject Cover Comparables Adjustments Pricing Finish 📳 😣                                      |
|---|--|
|   | Autosaved at 2/11/2011 2:37:28 PM  |
| 👵 Select CMA Co                                 | ontact   |
| Welcome to the CMA W<br>to navigate through the | fizard. Use this Start page to select your Contact. Use the above Navigation Bar<br>a steps. |
| Select Contact Name:                            | Create a New Contact   |
| Description:                                    | *  |
|   |  |

#### Note:

If you're creating a CMA for a client that's not in your contact list, click **Create a New Contact** to add a new contact.

If you need to save your CMA and finish it at a later date, click the 🗎 save icon. To continue creating a partially saved CMA, click the CMA link on the My Matrix tab to view all of your Saved CMAs. Click the arrow next to the CMA to expand it and click the Edit CMA button.

- 4. You can optionally enter a Description to help you identify the CMA.
- 5. Click the Pages button to move to the next section of the CMA Wizard.



6. Click the plus button next to the Available Page types to expand them, then select a page to add it to your CMA. The page will appear in the Selected Pages box to the right.



#### Note:

To change the order of a page in the Selected Pages Box, click a page, then click the blue up or down arrows on the right to move the selected page.

To delete a page from Selected Pages box, click the page you want to remove and click the red X.

To remove all pages, click the Clear link at the bottom right corner.

Refer to the table below for a brief description of the available pages for presentation CMAs.

| Report   | Description  |
|--|--|
| Cover sheet                                    | A cover page that contains your name, office, office phone<br>number and e-mail address. You can also add a photo and<br>description by clicking the <b>Edit Subject</b> button. |
| Market Analysis<br>Explanation                 | An explanation and overview of a CMA.  |
| Minimums and Maximums                          | Summarizes key fields of the listings in the analysis such as price, bedrooms, bathrooms, square feet, price per square foot, and year built.                                    |
| Summary of Comparable<br>Listings              | Summarizes the comparable listings contained in the market analysis.   |
| Number of Days on Market                       | A graph that illustrates the number of days on market for the listings in this analysis.   |
| List and Sale Price                            | A graph that illustrates the list price, along with the sale price in Sold listings.   |
| The Importance of Pricing                      | A chart that highlights the importance of pricing correctly at market value.   |
| Activity vs. Timing                            | A chart that highlights the importance of pricing correctly at market value.   |
| The Effect of Over Pricing                     | A chart that highlights the importance of pricing correctly at market value.   |
| The Pitfalls of Overpricing                    | A chart that highlights the importance of pricing correctly at market value.   |
| Setting the Price                              | A chart that highlights the importance of pricing correctly at market value.   |
| Sources of Buyers                              | Illustrates the primary sources of buyers for your property.   |
| Where a Commission<br>Goes                     | Describes how commission is divided amongst all the parties involved.  |
| The Benefit of Using a<br>Professional Realtor | Outlines the benefits of using a professional REALTOR <sup>®</sup> to sell your property.  |

| My Guarantee to You            | Your personal guarantee to your client.  |
|--------------------------------|--|
| Steps to a Positive<br>Showing | Describes the steps for making a positive showing of your property.  |
| What it Takes to Show          | Describes what it takes to show your property.   |
| CMA Pro Report                 | Shows three properties per page with a photo and important<br>property details. It includes the average prices, summary<br>graph/analysis, cumulative analysis, and sold property<br>analysis. |
| CMA Full Report                | Summarizes the comparable listings contained in the market<br>analysis. It contains three properties per page with important<br>property details and a photo.                                  |
| CMA Brief Report               | Summarizes the comparable listings contained in the market analysis.   |
| Listing Details 3 Up           | Details the comparable listings contained in the market analysis, 3 properties per page with a photo.  |
| CMA Price Adjustments          | Outlines the subject property versus the comparable properties.  |

7. Click the **Subject** button to move to the next section of the CMA Wizard.



- 8. Use one of the following methods to enter information for your subject property:
  - Click Type in the subject property fields manually and enter the information manually.
  - Enter a Residential Multiple Listing Number in the available field and click the **Fill** button to autofill information for your subject property.
  - Click **Search for a Residential listing to auto-fill from** to search the MLS for your subject property and auto-fill the information.

9. Click the **Cover** button on the CMA Navigation bar.

| ummary • Contacts  | → Auto-Emails -> Saved Searches + | Sent Email • CMAs • Watched Listings • My Listings   | + Settings + Message Center<br>Q |
|--|-----------------------------------|--|----------------------------------|
| Start Pages  | Subject Cover Comparables         | Adjustments Pricing Finish 🔚 😵<br>Autosaved at 10/15/2010 12:37:49 PM  |                                  |
| 🐉 Subject Prop   | perty Information                 | 휞 Agent Information  | E Set as Defaults                |
| Name:<br>Address Line 1:<br>Address Line 2:<br>City / State / Zip:<br>Phone: | Client 1                          | Name:       Company:       Address Line 1:       Address Line 2:       City / State / Zip:       Phone:       Email: |                                  |
| Subject Cover Pho  | bito                              | Agent Photo or Broker Logo   | 🧐 <u>Clear Photo</u>             |
| 📕 Upload Photo   | 0:<br>Optimal Image Size: 384 x   | Browse Browse  | Browse                           |

10. Enter the following information in the available fields:

- Enter your client's contact information under Subject Property Information.
- Click Browse under Subject Cover Photo to upload a subject property photo that you have saved on your computer. If you auto-populated your Subject property from the MLS, a subject photo will automatically be selected. To change the auto-populated photo, click Browse to upload a photo that you have saved on your computer.

### Note:

If you auto-filled your subject property from an existing listing, the Subject Cover Photo will automatically be selected. If the Cover button is grayed out, one of the Cover pages was not added to your CMA report. Click the Pages button on the navigation bar to go back and add a Cover page.

- Enter your contact information under Agent Information. To save your contact information for future CMAs, click **Set as Defaults**.
- Click **Browse** under Agent Photo or Broker Logo to upload a photo of yourself or a broker's logo that you have saved on your computer.

11. Click the **Comparables** button to move to the next section of the CMA Wizard.



12. Do one of the following:

- To add additional comparables, click the Search for Additional Comparables or Add Comparables from Cart button.
- To remove comparables, click the checkbox next to each comparable you want to remove, then click the **Remove Selected** button.

| × :        | Selected C                    | Comparat                                  | bles                  |                     |          |        |              |             |        |          |       |        |                |   |
|------------|-------------------------------|---|-----------------------|---------------------|----------|--------|--------------|-------------|--------|----------|-------|--------|----------------|---|
| 1-2<br>Pre | 0 of 20 Che<br>vious • Next • | cked 0. <u>Che</u><br>[1] · <u>Bottom</u> | <u>ck all 20</u><br>บ |                     |          |        |              |             |        |          |       |        |                |   |
|            | ML#                           | S Type                                    | St#                   | St Name             | City     | Area   | MB#          | L/S Price   | Br/Ba  | YrBlt    | Sqft  | LSqft  | DOM/CDOM       | V |
|            | <u>S643547</u>                | P SFR/A                                   | 247                   | ALDERWOOD WY        | RVSD     | 252    | 716D5        | \$195,000   | 4/2.00 | 1988/ASS | 1,540 | 12,632 | 1/1            | Y |
|            | <u>X10116881</u>              | S SFR/A                                   | 6854                  | Blackwood ST        | AMAD     | 28     |              | \$2 🖊       | 3/3.00 | 1988     | 1,690 | 12,197 | <u>31/31</u>   | Y |
|            | <u>K214258</u>                | S SFR/A                                   | 617                   | PEACHWOOD PL        | RVSD     | 252    | <u>716E5</u> | \$214,000   | 3/3.00 | 1992     | 1,970 | 11,761 | 0/0            | Y |
|            | A09108177                     | S SFR/A                                   | 6940                  | Blackwood ST        | RVSD     | 252    | <u>716D4</u> | \$265,000 🛧 | 4/3.00 | 1988     | 1,867 | 12,196 | 265/265        | N |
|            | <u>1289740</u>                | S SFR/A                                   | 261                   | GRACEFIELD WAY      | RVSD     | 252    | 716D5        | \$287,500 🖊 | 4/2.75 | 1988     | 2,272 | 8,712  | <u>20/20</u>   | N |
|            | <u>I10086697</u>              | S SFR/A                                   | 438                   | Pinetree WY         | RVSD     | 252    | <u>716E4</u> | \$315,000 🛧 | 5/3.00 | 1989     | 2,658 | 12,196 | <u>116/116</u> | N |
|            | I312794                       | S SFR/A                                   | 6826                  | LAURELBROOK         | RVSD     | 252    | 716D4        | \$320,000 🕹 | 5/3.00 |          | 2,293 |        | 73/73          | Y |
| - P        | revious · Next                | ·[1] · Top                                |                       |                     |          |        |              |             |        |          |       |        |                |   |
|            |                               | S SFR/A                                   |                       |                     |          |        |              |             |        |          |       |        |                |   |
|            | 🗙 Remove                      | Selected                                  | 🔍 Search for /        | Additional Comparab | oles 🛒 A | dd Con | nparables    | from Cart   |        |          |       |        |                |   |
|            |                               |   |                       | Cypress Grove DR    |          |        | /1605        |             |        |          |       |        |                |   |

13. Click the Adjustments button to move to the next section of the CMA Wizard.

| Start | Pages | Subject | Cover | Comparables | Adjustments | Pricing | Finish |  |
|-------|-------|---------|-------|-------------|-------------|---------|--------|--|
|-------|-------|---------|-------|-------------|-------------|---------|--------|--|

14. Set values for property features to automatically adjust all of the comparables according to the amounts you specified.

| 🍃 Adjustment Details  |        |         |                   |              |             | 国 <u>View in Detail Mode</u> |
|-----------------------|--------|---------|-------------------|--------------|-------------|------------------------------|
|                       | Status | Price   | Adjusted<br>Price | Area         | Baths Total | Bedrooms                     |
| Feature Value         |        |         |                   |              |             |                              |
| 6854 Blackwood        |        |         |                   | Lakewood Cit | 3           | 3                            |
| 247 ALDERWOOD WY      | Р      | 195,000 | 195,000           | Riverside    | 2           | 4                            |
| 6854 Blackwood ST     | s      | 2       | 2                 | Lakewood Cit | 3           | 3                            |
| 617 PEACHWOOD PL      | s      | 214,000 | 214,000           | Riverside    | 3           | 3                            |
| 6940 Blackwood ST     | s      | 265,000 | 265,000           | Riverside    | 3           | 4                            |
| 261 GRACEFIELD WAY    | s      | 287,500 | 287,500           | Riverside    | 2.75        | 4                            |
| 438 Pinetree WY       | s      | 315,000 | 315,000           | Riverside    | 3           | 5                            |
| 6826 LAURELBROOK      | s      | 320,000 | 320,000           | Riverside    | 3           | 5                            |
| 6811 IRONWOOD DR      | s      | 320,000 | 320,000           | Riverside    | 2           | 4                            |
| 6983 MISSION GROVE    | s      | 325,000 | 325,000           | Riverside    | 3           | 4                            |
| 650 Lakewood DR       | s      | 334,900 | 334,900           | Riverside    | 3           | 3                            |
| 6903 Cypress Grove DR | s      | 335,000 | 335,000           | Riverside    | 3           | 4                            |
| 6811 DEERWOOD         | s      | 337,000 | 337,000           | Riverside    | 2           | 4                            |
| 606 Peachwood PL      | s      | 370,000 | 370,000           | Riverside    | 2           | 4                            |
| 6811 Ironwood DR      | s      | 419,900 | 419,900           | Riverside    | 2           | 4                            |
| 6940 BLACKWOOD ST     | s      | 475,000 | 475,000           | Riverside    | 2           | 4                            |
| 284 PINETREE WY       | s      | 515,000 | 515,000           | Riverside    | 3           | 5                            |
| 641 FIRWOOD CT        | s      | 539,900 | 539,900           | Riverside    | 2.75        | 4                            |
| 6927 CYPRESS GROVE    | s      | 540,000 | 540,000           | Riverside    | 3           | 5                            |
| 6749 MISSION GROVE    | s      | 550,000 | 550,000           | Riverside    | 2           | 4                            |
| 6608 DARKWOOD DR      | s      | 660,000 | 660,000           | Riverside    | 2           | 4                            |
| Low                   |        | 2       | 2                 |              |             |                              |
| Median                |        | 334,950 | 334,950           |              |             |                              |
| Average               |        | 365,910 | 365,910           |              |             |                              |
| High                  |        | 660,000 | 660,000           |              |             |                              |

#### Note:

If the Adjustments button is grayed out, the Price Adjustments page was not added to your CMA report. Click the Pages button on the navigation bar to go back and add the Price Adjustments page.

15. Click the **Pricing** button to move to the next section of the CMA Wizard.

| Start | Pages | Subject | Cover | Comparables | Adjustments | Pricing | Finish | 8 |
|-------|-------|---------|-------|-------------|-------------|---------|--------|---|
|-------|-------|---------|-------|-------------|-------------|---------|--------|---|

The Summary table summarizes the price calculated from the adjusted comparables and provides you with an estimate of what the property is worth.

16. Enter information in the Suggested List Price field, if necessary.

| Rummary.   |                                       |                  |  |                   |                  |          |  |  |  |  |
|--|---------------------------------------|------------------|--|-------------------|------------------|----------|--|--|--|--|
| un Summary   |                                       |                  |  |                   |                  |          |  |  |  |  |
| The following table summarizes the price   | es calculate:                         | d from the adj   | usted comparab                         | les:              |                  |          |  |  |  |  |
|  | Low                                   | Median           | Average                                | High              | Count            |          |  |  |  |  |
| Comparable Price   | 2                                     | 334,950          | 365,910                                | 660,000           | 20               |          |  |  |  |  |
| Adjusted Comparable Price  | 2                                     | 334,950          | 365,910                                | 660,000           | 20               |          |  |  |  |  |
| 晶 Additional Analysis  |                                       |                  |  |                   |                  |          |  |  |  |  |
| This section provides some additional p  | ricing statist                        | ics obtained by  | y comparing the                        | subject prope     | rty with the com | nparable |  |  |  |  |
|  |                                       |                  |  |                   |                  |          |  |  |  |  |
| \$ Suggested List Price  |                                       |                  |  |                   |                  |          |  |  |  |  |
| •  |                                       |                  |  |                   |                  |          |  |  |  |  |
| Enter the price or price range that should be the should b | ld appear oi<br>we this snar          | n the CMA, e.g   | . "I think we sho<br>vite the price in | ould list your he | ouse             |          |  |  |  |  |
| meet with the client.  | , , , , , , , , , , , , , , , , , , , |                  |  | by hand whom      | ,                |          |  |  |  |  |
|  |                                       |                  |  |                   | ~                |          |  |  |  |  |
| Characters Remaining: 250  |                                       |                  |  |                   |                  |          |  |  |  |  |
| Check Spelling <u>English</u>  |                                       |                  |  |                   |                  |          |  |  |  |  |
|  |                                       |                  |  |                   |                  |          |  |  |  |  |
| 🥃 Notes  |                                       |                  |  |                   |                  |          |  |  |  |  |
| Enter any additional comments which s  | hould annea                           | r with the price |  |                   | <b>A</b>         |          |  |  |  |  |
| Enter any additional comments which s  | ловів арреа                           | r wiar are price | -                                      |                   |                  |          |  |  |  |  |
|  |                                       |                  |  |                   |                  |          |  |  |  |  |
|  |                                       |                  |  |                   | <u> </u>         |          |  |  |  |  |
| Characters Remaining: 1000<br>Check Spelling English   |                                       |                  |  |                   |                  |          |  |  |  |  |
|  |                                       |                  |  |                   |                  |          |  |  |  |  |

#### Note:

If the Pricing button is grayed out, the Pricing Recommendation page was not added to your CMA report. Click the Pages button on the navigation bar to go back and add the Pricing Recommendations page.

17. Click the Finish button to move to the last section of the CMA Wizard.



18. Do one of the following:

- Click View CMA to view and print the CMA report.
- Click Email CMA to email the CMA Report to your client.

|   | Prepared For: Client 1  |
|---|---|
| 💋 View CMA 🛛 🖾 Email CMA  | Subject Property: 6854 Blackwood  |
| Selected Pages  | Subject Photo   |
| Cover Sheet<br>Price Adjustments<br>Summary List<br>Minimums and Maximums<br>Chart Days on Market<br>Chart List and Sale Price<br>Pro Report<br>Listing Details 3 Up<br>Pricing Recommendations<br>Explanation<br>Importance of Pricing<br>Setting the Price<br>Where a Commission Goes<br>Benefits of using a Realtor<br>My Guarantee to You<br>Steps to a Positive Showing<br>What It Takes to Show | No Photo Available  |
| Counts of Comparable Properties   | and the second se |
| Pending Sale: 1<br>Closed Sale: 19<br>Total: 20   | Photos not supplied by listing broker at this time  |

### Note:

To view a saved CMA, click the CMA link on the My Matrix tab to view all of your Saved CMAs. You can also click the Contacts link on the My Matrix tab to open a CMA Report for a particular client.

### Managing Presentation CMAs

To manage your CMAs, click the **CMA** link on the My Matrix tab.

| MATRIX  | Home     | Search     | My Matrix    | Add/Edit     | Finance    | Roster    | Realist Tax    | Links    | Help    | Logout  |  |
|---|----------|------------|--------------|--------------|------------|-----------|----------------|----------|---------|---------|--|
| Summary · Contacts  | • Auto E | mails • Sa | aved Searche | es 🔸 Sent Er | mail • CMA | ∖s · Wato | hed Listings + | My Listi | ngs • S | ettings |  |
|   |          |            |              |              |            |           |                |          |         |         |  |
|   |          |            |              |              |            |           |                |          |         |         |  |
| <i>≜</i> <u>Contacts</u> 2  |          |            |              |              |            |           |                |          |         |         |  |
| Auto Emails - Concierge - Saved Searches - Sent Email - CMAs - Watched Listings |          |            |              |              |            |           |                |          |         |         |  |

### Note:

You can also click the **Contacts** link on the My Matrix tab and open the CMA for a particular client.

Click the arrow next to expand the CMA to do the following:

- Click Edit CMA button to make changes to an existing CMA report.
- Click View CMA button to view a previously generated CMA report.
- Click Email CMA button to email the selected CMA report to a client.
- Click **Delete CMA** button to delete the CMA report.

|            |  |              | 22022824    |              | ()port        |
|------------|--|--------------|-------------|--------------|---------------|
| 1 1 0      | Description  | Contact Name | Туре        | When Created | Last Modified |
|            | 854 Blackwood Comps  | 1, Client    | Residential | 11:46 AM     | 11:47 AM      |
| C P C<br>T | 6854 Blackwood<br>ounts of Comparable Properties<br>ending Sale: 1<br>losed Sale: 19<br>otal: 20<br>Edit CMA View CMA Email CMA Delete CMA |              |             |              |               |
| 1 - 1      | Innamed CMA  |              | Residential | 2/11/2011    | 2/11/2011     |

You can also use the buttons at the bottom of the screen to start a new CMA, copy the selected CMA, and delete selected CMAs.

### Note:

The Matrix Platform automatically deletes unmodified CMAs that are 90 day old.

### **Generating Quick or Statistical CMA Reports**

Follow the steps below to generate a Quick CMA or Statistical CMA for any property type. Before you begin, search for comparable properties as described in Searching for Comparable Properties.

| 1-2 | :5 of 29 · Che   | ecked 25 · <u>Che</u>          | eck all 29                       |   |          |      |              | Display   Agent | 1 Line | 🗾 at     | 25 -  | per pag | e · View as 4 🦉 | \$ |
|-----|--|--------------------------------|----------------------------------|---|----------|------|--------------|-----------------|--------|----------|-------|---------|-----------------|----|
| Pre | vious • <u>Next</u> •  | [1] 2                          |                                  |   |          |      |              |                 |        |          |       |         |                 |    |
| 7   | ML#  | S Type                         | St#                              | St Name   | City     | Area | MB#          | L/S Price       | Br/Ba  | YrBlt    | Sqft  | LSqft   | DOM/CDOM        | ۷  |
| 7   | F1835362   | A SFR/D                        | 122 W                            | ALISO ST  | POM      | 687  | 60035        | \$250,000 🕹     | 3/2.00 | 1947/ASS | 1,605 | 6,556   | 102/102         | Ν  |
| 7   | C10099611  | A SFR/A                        | 2390                             | Notre Dame AV   | POM      | 687  | <u>641B5</u> | \$250,000 🛧     | 3/1.00 | 1953     | 1,114 | 6,048   | 89/91           | Y  |
| ~   | <u>H10119763</u>   | A SFR/D                        | 2238                             | Academy AV  | POM      | 687  | 600D7        | \$250,000       | 4/2.00 | 1955     | 1,312 | 6,000   | 92/92           | Y  |
| V   | H10128213  | A SFR/A                        | 662                              | ALBONA PL   | POM      | 687  | 640B2        | \$250,000 🕹     | 3/2.00 | 1956     | 1,469 | 6,230   | 66/66           | Ν  |
| 7   | C11004391  | A SFR/D                        | 620                              | San Bernardino AV   | POM      | 687  | 601A6        | \$250,000 🖊     | 4/2.00 | 1952     | 2,622 | 6,600   | 32/32           | Ν  |
| 7   | <u>R1100335</u>  | A SFR/D                        | 1543                             | VEJAR ST  | POM      | 687  | <u>640G2</u> | \$250,000       | 3/2.00 | 1947/ASS | 1,662 | 8,799   | 31/31           | Ν  |
| ~   | H10077728  | A SFR/A                        | 2185                             | Virginia AV   | POM      | 687  | <u>641B5</u> | \$255,000 🛧     | 3/1.00 | 1947     | 1,418 | 8,878   | 75/75           | Ν  |
| ~   | C11012675  | A SFR/A                        | 1419                             | Darby AV  | POM      | 687  |              | \$256,000       | 3/1.00 | 1952     | 1,014 | 7,735   | 14/14           | Y  |
| 7   | <u>W11013481</u>   | A SFR/D                        | 903                              | Hartford PL   | POM      | 687  |              | \$258,000       | 3/2.00 | 1979     | 1,199 | 9,400   | 12/29           | Ν  |
| 7   | <u>W11017389</u>   | A SFR/A                        | 1765 S                           | Reservoir ST  | POM      | 687  |              | \$258,000       | 3/3.00 | 1992     | 1,608 | 3,851   | 4/4             | N  |
| ~   | <u>W11002443</u>   | A SFR/A                        | 545 E                            | Arrow_  | POM      | 687  | <u>601A4</u> | \$259,000       | 3/2.00 | 1954/ASS | 1,531 | 12,630  | <u>40/40</u>    | Ν  |
| Pr  | evious • <u>Next</u>   | • [1] <u>2 • Top</u> •         | Bottom                           |   |          |      |              |                 |        |          |       |         | Carts           |    |
| 2.  |  | ALC: NOT THE OWNER             |                                  |   | and the  | -117 |              |                 |        |          |       |         |                 |    |
| 0   | Revise I   | 🖬 Emai 🔛 R                     | leport E CMA                     | Map In Stats  | 🗄 Save A |      |              |                 |        |          | < N   | arrow D | iscard Export   |    |
| 1   | the second s | The second second in the large | Carl Contract I a service of the | Contraction and a second |          |      |              |                 |        |          |       |         |                 |    |

1. Click the **Report** button at the bottom of the Search Results page.

2. Select Quick CMA or Statistical CMA, then click Email or Print/View.



### Note:

You can select up to 100 listings for Quick CMA and Statistical CMA.

### **Exporting Listings for Other CMA Programs**

Follow the steps below to export listing data from the Matrix Platform for other CMA programs.

1. Click the checkbox next to each listing you want to export on the comparable Search Results page.

| revious    | · Next ·        | [1]  | 2                  |      |   |                   |      |      |              |             |        |          |       |        |          |    |
|------------|-----------------|------|--------------------|------|---|-------------------|------|------|--------------|-------------|--------|----------|-------|--------|----------|----|
| ML#        | Inoxe           | S    | <br>Түре           | St#  |   | St Name           | City | Area | MB#          | L/S Price   | Br/Ba  | YrBlt    | Saft  | LSaft  | DOM/CDOM | V  |
| F183       | 5362            | A    | SFR/D              | 122  | w | ALISO ST          | POM  | 687  | 60035        | \$250,000 🕹 | 3/2.00 | 1947/ASS | 1,605 | 6,556  | 102/102  | N  |
| C100       | 099611          | A    | SFR/A              | 2390 |   | Notre Dame AV     | POM  | 687  | <u>641B5</u> | \$250,000 🛧 | 3/1.00 | 1953     | 1,114 | 6,048  | 89/91    | Y  |
| H101       | 19763           | A    | SFR/D              | 2238 |   | Academy AV        | POM  | 687  | 600D7        | \$250,000   | 4/2.00 | 1955     | 1,312 | 6,000  | 92/92    | ୍ୟ |
| H101       | 28213           | A    | SFR/A              | 662  |   | ALBONA PL         | POM  | 687  | 640B2        | \$250,000 🕹 | 3/2.00 | 1956     | 1,469 | 6,230  | 66/66    | N  |
| <u>C11</u> | 004391          | A    | SFR/D              | 620  |   | San Bernardino AV | POM  | 687  | <u>601A6</u> | \$250,000 🕹 | 4/2.00 | 1952     | 2,622 | 6,600  | 32/32    | N  |
| R110       | 00335           | A    | SFR/D              | 1543 |   | VEJAR ST          | POM  | 687  | <u>640G2</u> | \$250,000   | 3/2.00 | 1947/ASS | 1,662 | 8,799  | 31/31    | N  |
| H100       | 077728          | A    | SFR/A              | 2185 |   | Virginia AV       | POM  | 687  | <u>64185</u> | \$255,000 🛧 | 3/1.00 | 1947     | 1,418 | 8,878  | 75/75    | N  |
| <u>C11</u> | 012675          | A    | SFR/A              | 1419 |   | Darby AV          | POM  | 687  |              | \$256,000   | 3/1.00 | 1952     | 1,014 | 7,735  | 14/14    | Y  |
| <u>W11</u> | 013481          | A    | SFR/D              | 903  |   | Hartford PL       | POM  | 687  |              | \$258,000   | 3/2.00 | 1979     | 1,199 | 9,400  | 12/29    | N  |
| W11        | 017389          | A    | SFR/A              | 1765 | s | Reservoir ST      | POM  | 687  |              | \$258,000   | 3/3.00 | 1992     | 1,608 | 3,851  | 4/4      | N  |
| <u>W11</u> | 002443          | A    | SFR/A              | 545  | Е | Arrow_            | POM  | 687  | <u>601A4</u> | \$259,000   | 3/2.00 | 1954/ASS | 1,531 | 12,630 | 40/40    | N  |
| Previou    | s • <u>Next</u> | · [1 | ] 2 · Top · Botton | n    |   |                   |      |      |              |             |        |          |       |        | Carts    | 5  |
|            |                 |      |                    |      |   |                   |      |      |              |             |        |          |       |        |          | _  |

### Note:

You can select up to 500 listings at a time to Export.

- 2. Click Export.
- 3. Choose from any of the Available Exports and click **Export**.
- 4. Follow the prompts on the screen to save the exported listings to your computer.

## **Custom Displays and Exports**

Custom displays and exports allow you to create displays and exports with all of your favorite fields. Follow the steps in these sections to create a custom displays and exports:

- Creating Custom Displays
- Creating Custom Exports

### **Creating Custom Displays**

Follow the steps below to create a custom one line display for viewing and printing listings.

### Note:

You can create multiple custom displays for each property type.

- 1. Click the My Matrix tab.
- 2. Click the Settings link.

|  | earch My Matrix Add/Edit         | Finance Roster     | Realist Tax Links         | Help Logout    |
|--|----------------------------------|--------------------|---------------------------|----------------|
| Summary · Contacts · Auto Ema  | ils • Saved Searches • Sent En   | hail • CMAs • Wate | ched Listings • My Listin | ngs • Settings |
|  | 0                                |                    | 9                         |                |
| Contacts 2 Auto Emails - Concierge - Saved 3 My Listings 2 My Active Residential | Searches · Sent Email · CMAs · \ | Vatched Listings   |                           |                |

### 3. Click Custom Displays.

| 🖾 Email Signature   |   |
|---|---|
|   | *                                       |
| Check Spelling <u>English</u>                                 | Save Email Signature                    |
| E Header & Footer   |   |
| You have currently selected 'Flag - No Photo' as your Header, | /Footer package, <u>Package Details</u> |
| G Speed Bar Shortcuts   |   |
| Number of Speed Bar Shortcuts: 1                              |   |
| a <u>Team Settings</u>  |   |
| You have 0 members on your team.                              |   |
| 💷 Custom Displays   |   |
| Number of Custom Displays: 1                                  |   |
| B <u>Custom Exports</u>                                       |   |
| Number of Custom Exports: 1                                   |   |

4. Select a property type in the Table drop-down list, then click the Add button.

| Table: Residential | ·         |
|--------------------|-----------|
|                    | Move Up   |
|                    | Move Down |
|                    | Add       |
|                    | Edit      |
|                    | Сору      |
|                    | Delete    |

#### Note:

Use the Edit, Copy, and Delete buttons to manage existing custom displays. You can also change the sort order of the custom displays by selecting the display and clicking the Move Up or Move Down buttons.



| Up<br>Down |
|------------|
|            |
| roperties  |
|            |

5. Select a field in the Available Columns list, then click the **Add** button to add them to the Selected Columns list.

If you need to remove a fields from the Selected Columns list, select the column and click the **Remove** button.

### Note:

To re-order the columns, select a column and use the **Up** and **Down** buttons.

6. To change the Label, width, or alignment of a column, select the column in the Selected Columns list and make changes to the Label, Pixel Width, and Alignment fields as necessary.

### Note:

You may need to increase the Width of some of the field to prevent information from being cutting off in your custom display (96 pixels is approximately equal to one inch).

- 7. Click the checkbox next the icons you want to add to your custom display under Special Columns.
- 8. Click **Save** to save your custom display or click **Cancel** to go back to the previous screen without saving.
- 9. When you're done creating your custom Display, click **Done**.

To view your Custom Display, search for listings and select your custom display in the Display dropdown list.

| 1-25 of 29 · Checked (                | ● <u>Check all 29</u> • <u>I</u> | Agent 1 | <u>Line display</u> | Displa  | y my:Custom Di | splay 💌 at 25 💽 | 🔹 per page 🛛 Edit 🔹 View as 🚨 |
|---------------------------------------|----------------------------------|---------|---------------------|---------|----------------|-----------------|-------------------------------|
| Previous • <u>Next</u> • <b>[1]</b> 2 |                                  |         |                     |         |                |                 |                               |
| 🗖 Area                                | Bedrooms                         | Baths   | City                | Price   | DOM            | CDOM            |                               |
| Pomona                                | 3                                | 2.00    | Pomona              | 250,000 | 102            | 102             |                               |
| Pomona                                | 3                                | 1.00    | Pomona              | 250,000 | 89             | 91              |                               |
| 🗖 Pomona                              | 4                                | 2.00    | Pomona              | 250,000 | 92             | 92              |                               |
| Pomona                                | 3                                | 2.00    | Pomona              | 250,000 | 66             | 66              |                               |
|                                       |                                  |         |                     |         |                |                 |                               |
| Previous <u>Next</u> [1]              | <u>2 STop Bottom</u>             |         |                     |         |                |                 | 🛒 Carts                       |
| Pomona                                | 3                                | 1.00    | Pomona              | 255,000 | 75             |                 |                               |
| 🔣 Revise 🔤 Ema                        |                                  |         | 💹 Map 🚺 Stats       | 📙 Save  | As             |                 | Narrow Discard Export         |
| Pomona                                | 3                                | 2.00    | Pomona              | 200,000 | 12             | 29              |                               |

If one of the columns is too wide or too narrow, click **Edit** to change the Pixel width for that column (96 pixels is approximately equal to one inch).

### **Creating Custom Exports**

Follow the steps below to create specialized exports for third-party software or to help you analyze listing data.

- 1. Click the My Matrix tab.
- 2. Click the **Settings** link.

|  | Home Se       | arch My Matrix    | : Add/Edit      | Finance     | Roster   | Realist Tax    | Links     | Help    | Logout  |
|--|---------------|-------------------|-----------------|-------------|----------|----------------|-----------|---------|---------|
| Summary · Contacts                       | • Auto Emai   | s • Saved Searc   | hes • Sent Em   | nail • CMA: | s • Watc | hed Listings + | My Listin | ngs • S | ettings |
|  |               |                   | 0               |             |          |                | G         |         |         |
| <u>Contacts</u> 2 Auto Emails · Concierç | je • Saved Si | earches · Sent En | nail • CMAs • V | Watched Lis | stings   |                |           |         |         |
| My Listings 2                            | 2             |                   |                 |             |          |                |           |         |         |
| 🏶 <u>Settings</u>                        |               |                   |                 |             |          |                |           |         |         |

### 3. Click Custom Exports.

| 🖾 Email Signature   |  |
|---|--|
|   | ×                                      |
| Check Spelling <u>English</u>                                 | Save Email Signature                   |
| E Header & Footer   |  |
| You have currently selected 'Flag - No Photo' as your Header/ | Footer package, <u>Package Details</u> |
| Speed Bar Shortcuts Number of Speed Bar Shortcuts: 1          |  |
| ab <u>Team Settings</u>                                       |  |
| You have 0 members on your team.                              |  |
| 🗟 <u>Custom Displays</u>                                      |  |
| Number of Custom Displays: 1                                  |  |
| Custom Exports           Number of Custom Exports: 1          |  |

4. Select a property type in the Table drop-down list and click the **Add** button.



### Note:

Use the Edit, Copy, and Delete buttons to manage existing custom exports. You can also change the sort order of the custom exports by selecting an export and clicking the Move Up or Move Down buttons.

3. Enter a name for the custom export.

| Set Export Definition  |             | Residential |
|--|-------------|-------------|
| Export Name:<br>Available Fields<br>1st Loan Type<br>1st Loan Type<br>1st Trust Deed Interest Rate<br>1st Trust Deed Loan Amount<br>220V<br>2nd Loan Rate Type<br>2nd Loan Rate Type<br>2nd Trust Deed Interest Rate<br>2nd Trust Deed Loan Amount<br>Acres<br>Agent Remarks<br>Appliances | d-><br>move | Up<br>Down  |
| Include Column Names: None O Label O Name O<br>Separator: Comma O Tab O<br>Export Description:   |             |             |

5. Select a field in the Available Fields list, then click the **Add** button to add them to the Export Fields list.

If you need to remove a fields from the Export Fields list, select the field and click the **Remove** button.

### Note:

To re-order the fields, select a field and use the **Up** and **Down** buttons.

- 6. Select an option for Include Column Names to include or exclude the column Label or Name in your export.
- 7. Select the type of Separator you would like to use for your export.
- 8. Type a description for your export to help you easily identify it.
- 9. Click **Save** to save your custom export or click **Cancel** to go back to the previous screen without saving.

To generate your custom export, perform a listing search and select the listings you want to export. Then click the Export button.

| 1-:                     | 25 of 29 · Ch        | necked <b>25</b> · <u>Check al</u> | 1 29    |                   |           |       |              | Display Agent | 1 Line | 🗾 at     | 25 💌  | ] per pag | e · View as 4 | 3   |
|-------------------------|----------------------|------------------------------------|---------|-------------------|-----------|-------|--------------|---------------|--------|----------|-------|-----------|---------------|-----|
| Pre                     | evious • <u>Next</u> | · [1] <u>2</u>                     |         |                   |           |       |              |               |        |          |       |           |               |     |
| $\overline{\mathbf{v}}$ | ML#                  | S Type                             | St#     | St Name           | City      | Area  | MB#          | L/S Price     | Br/Ba  | YrBlt    | Sqft  | LSqft     | DOM/CDOM      | V   |
| •                       | F1835362             | A SFR/D                            | 122 W   | ALISO ST          | POM       | 687   | 60035        | \$250,000 🕹   | 3/2.00 | 1947/ASS | 1,605 | 6,556     | 102/102       | N   |
| 7                       | C10099611            | A SFR/A                            | 2390    | Notre Dame AV     | POM       | 687   | <u>641B5</u> | \$250,000 🛧   | 3/1.00 | 1953     | 1,114 | 6,048     | 89/91         | Y   |
| 7                       | H10119763            | A SFR/D                            | 2238    | Academy AV        | POM       | 687   | 600D7        | \$250,000     | 4/2.00 | 1955     | 1,312 | 6,000     | 92/92         | Y   |
| 4                       | H10128213            | A SFR/A                            | 662     | ALBONA PL         | POM       | 687   | 640B2        | \$250,000 🕹   | 3/2.00 | 1956     | 1,469 | 6,230     | 66/66         | N   |
| 7                       | C11004391            | A SFR/D                            | 620     | San Bernardino AV | POM       | 687   | 601A6        | \$250,000 🖊   | 4/2.00 | 1952     | 2,622 | 6,600     | 32/32         | N   |
| 7                       | R1100335             | A SFR/D                            | 1543    | VEJAR ST          | POM       | 687   | <u>640G2</u> | \$250,000     | 3/2.00 | 1947/ASS | 1,662 | 8,799     | 31/31         | N   |
| 7                       | H10077728            | A SFR/A                            | 2185    | Virginia AV       | POM       | 687   | <u>641B5</u> | \$255,000 🛧   | 3/1.00 | 1947     | 1,418 | 8,878     | 75/75         | Ν   |
| 7                       | C11012675            | A SFR/A                            | 1419    | Darby AV          | POM       | 687   |              | \$256,000     | 3/1.00 | 1952     | 1,014 | 7,735     | 14/14         | Y   |
| 7                       | W11013481            | A SFR/D                            | 903     | Hartford PL       | POM       | 687   |              | \$258,000     | 3/2.00 | 1979     | 1,199 | 9,400     | 12/29         | N   |
| 7                       | W11017389            | A SFR/A                            | 1765 S  | Reservoir ST      | POM       | 687   |              | \$258,000     | 3/3.00 | 1992     | 1,608 | 3,851     | 4/4           | N   |
| 7                       | W11002443            | A SFR/A                            | 545 E   | Arrow             | POM       | 687   | <u>601A4</u> | \$259,000     | 3/2.00 | 1954/ASS | 1,531 | 12,630    | 40/40         | Ν   |
| P                       | revious • <u>Nex</u> |                                    | om      |                   |           |       |              |               |        |          |       |           | Carts         | s ) |
| Ε.                      |                      |                                    |         |                   |           | - 117 |              |               |        |          |       |           | _             |     |
| (                       | 🔣 Revise             | 🙀 Email 📄 Repor                    | t 🖪 CMA | 🛛 💹 Map 🚺 Stats   | 冒 Save As |       |              |               |        |          | ( N   | larrow D  | iscard Export | t   |
|                         |                      |                                    |         |                   |           | 1     |              |               |        |          |       |           |               | _   |

### Note:

You can select up to 500 listings to export at a time.

Select your Custom Export from the drop-down list, then click the **Export** button.

| 🗲 Export 25 Records               |                           |
|-----------------------------------|---------------------------|
| Export file format: Custom Export | Export Edit Custom Export |
| Galack to Results                 |                           |

To edit or update your export, click the **Edit Custom Export** button.

To return to the Search Results page, click the Return to Search button.

## **Viewing Historical Listing Information**

The history of a listing displays a detailed record of all Status, Price, and Selling Compensation changes. Follow the steps in these sections to search view property history.

- Viewing History by Address, APN, or MLS Number
- Viewing History for Multiple Listings

### Viewing History by Address, APN, or MLS Number

Follow the steps below to view historical listing information for a single property by Address or APN number.

- 1. Click the **Search** tab.
- 2. Click the Address Search link under Property History.

|                            | ome Sear                   | ch My Matrix     | Add/Edit            | Finance        | Roster   | Realist Tax | Links | Help | Logout |
|----------------------------|----------------------------|------------------|---------------------|----------------|----------|-------------|-------|------|--------|
| Residential                |                            |                  |                     |                |          |             |       |      |        |
|                            |                            |                  | 0                   |                |          |             | (     |      |        |
|                            |                            |                  |                     |                |          |             |       |      |        |
| 🏫 Residential              |                            |                  |                     | <u>Cart:</u>   | My Resid | ential (2)  |       |      |        |
| Detail · Quick · MLS# · Ad | <u>idress</u> · <u>Tod</u> | ay's New Listing | <u>s · Create Y</u> | <u>our Own</u> |          |             |       |      |        |
|                            |                            |                  |                     |                |          |             |       |      |        |
| 🙋 Property History         | /                          |                  |                     |                |          |             |       |      |        |
| Address Search             |                            |                  |                     |                |          |             |       |      |        |
|                            |                            |                  |                     |                |          |             |       |      |        |

3. Type an address, APN, or MLS number into the available fields, then click Search.

| 2<br>2   | ML#:  |             |                              |
|--|---|-------------|------------------------------|
| Street Number: Street<br>7 6854 7 Blac   | Name:<br>kwood  | Unit#: Zip: |                              |
| Direction:     Suffix:       Image: North East South West     Image: Are Boo Drive Ros       Image: Or C Not     Image: Or C Not | nue<br>levard<br>e<br>id<br>v ⊂ Not<br>City:<br>29 Palms<br>Acampo<br>Acton<br>Adelanto<br>City:<br>0 29 Palms<br>Acampo<br>Acton<br>Adelanto | County:     | geles<br>e<br>mardino<br>Not |

### **Viewing History for Multiple Listings**

Follow the steps below to view Listing History for multiple listings. Before you begin, make sure that you've performed a search and are at the Search Results page.

1. From the Search Results page, click the checkbox next to each listing you want to view listing or property history for.

| <  |                        | RIX Home             | : Search My M     | latrix Add/Edit F | inance Ro   | ster f  | Realist Ta:  | < Links Help  | Logou  | it.      |       |         |               |   |
|----|------------------------|----------------------|-------------------|-------------------|-------------|---------|--------------|---------------|--------|----------|-------|---------|---------------|---|
| Re | sidential • Det        | tail · MLS#          |                   |                   |             | 2011    |              | ali el        |        | 12       |       |         |               |   |
|    |                        |                      |                   | 🔞 a sfr p         | omona \$250 | 0000-27 | 75000        |               |        |          |       |         |               |   |
|    |                        |                      |                   |                   |             |         |              |               |        |          |       |         |               |   |
| 1- | 25 of 29 · Ch          | ecked 4 · <u>Ch</u>  | eck all 29        |                   |             |         |              | Display Agent | 1 Line | 🗾 at     | 25 💌  | per pag | e · View as 4 | 3 |
| Pr | evious · <u>Next</u> · | [1]2                 |                   |                   |             |         |              |               |        |          |       |         |               |   |
| Г  | ML#                    | S Type               | St#               | St Name           | City        | Area    | MB#          | L/S Price     | Br/Ba  | YrBlt    | Sqft  | LSqft   | DOM/CDOM      | V |
| 1  | F1835362               | A SFR/D              | 122 W             | ALISO ST          | POM         | 687     | 60035        | \$250,000 🕹   | 3/2.00 | 1947/ASS | 1,605 | 6,556   | 102/102       | N |
|    | C10099611              | A SFR/A              | 2390              | Notre Dame AV     | POM         | 687     | <u>64185</u> | \$250,000 🛧   | 3/1.00 | 1953     | 1,114 | 6,048   | <u>89/91</u>  | Y |
| V  | H10119763              | A SFR/D              | 2238              | Academy AV        | POM         | 687     | 600D7        | \$250,000     | 4/2.00 | 1955     | 1,312 | 6,000   | 92/92         | Y |
|    | H10128213              | A SFR/A              | 662               | ALBONA PL         | POM         | 687     | 640B2        | \$250,000 🕹   | 3/2.00 | 1956     | 1,469 | 6,230   | 66/66         | Ν |
| ~  | C11004391              | A SFR/D              | 620               | San Bernardino AV | POM         | 687     | <u>601A6</u> | \$250,000 🖊   | 4/2.00 | 1952     | 2,622 | 6,600   | 32/32         | N |
| 1  | R1100335               | A SFR/D              | 1543              | VEJAR ST          | POM         | 687     | <u>640G2</u> | \$250,000     | 3/2.00 | 1947/ASS | 1,662 | 8,799   | 31/31         | Ν |
| F  | Previous • <u>Next</u> | • [1] <u>2</u> • Top | <u>o · Bottom</u> |                   |             |         |              |               |        |          |       |         | Carts         | D |
|    | Revise                 | 🐼 Email  🖹           | Report 📘 CMA      | 🔀 Map 🚺 Stats     | 📳 Save As   |         |              |               |        |          | ( N   | arrow D | iscard Export |   |

2. To view the history of the current listing, select **Listing History** in the 'Search selected for' drop-down list.

3. To view the entire listing history of the property, select **Property History** in the Search selected for drop-down list.

| 1-3      | 25 of 29 · Che        | ecked <b>4</b> · Check all 2'               | 9      |                   |        |      |              | Display Agent            | 1 Line | ▼ at      | 25 -      | ner nag   | e - View as 4 🚨 | L    |
|----------|-----------------------|---|--------|-------------------|--------|------|--------------|--------------------------|--------|-----------|-----------|-----------|-----------------|------|
| Bre      | uious - Next -        | [1] 2                                       | -      |                   |        |      |              | enepte) ( <u>reserve</u> |        |           | ,         | l ber beð |                 |      |
|          | MI #                  | S Type                                      | St#    | St Name           | City   | Area | MB#          | L/S Price                | Br/Ba  | YrBlt     | Soft      | 1 Soft    |                 | - 17 |
| <u>,</u> | F1835362              | A SFR/D                                     | 122 W  | ALISO ST          | POM    | 687  | 60035        | \$250,000                | 3/2.00 | 1947/ASS  | 1.605     | 6.556     | 102/102         | Ň    |
|          | C10099611             | A SFR/A                                     | 2390   | Notre Dame AV     | POM    | 687  | 641B5        | \$250,000 🛧              | 3/1.00 | 1953      | 1,114     | 6,048     | 89/91           | Y    |
|          | H10119763             | A SFR/D                                     | 2238   | Academy AV        | POM    | 687  | 600D7        | \$250,000                | 4/2.00 | 1955      | 1,312     | 6,000     | 92/92           | Y    |
|          | H10128213             | A SFR/A                                     | 662    | ALBONA PL         | POM    | 687  | 640B2        | \$250,000 🕹              | 3/2.00 | 1956      | 1,469     | 6,230     | 66/66           | Ν    |
|          | C11004391             | A SFR/D                                     | 620    | San Bernardino AV | POM    | 687  | <u>601A6</u> | \$250,000 🕹              | 4/2.00 | 1952      | 2,622     | 6,600     | <u>32/32</u>    | Ν    |
| ☑        | <u>R1100335</u>       | A SFR/D                                     | 1543   | VEJAR ST          | POM    | 687  | <u>640G2</u> | \$250,000                | 3/2.00 | 1947/ASS  | 1,662     | 8,799     | <u>31/31</u>    | Ν    |
|          | <u>H10077728</u>      | A SFR/A                                     | 2185   | Virginia AV       | POM    | 687  | <u>641B5</u> | \$255,000 🛧              | 3/1.00 | 1947      | 1,418     | 8,878     | <u>75/75</u>    | Ν    |
|          | C11012675             | A SFR/A                                     | 1419   | Darby AV          | POM    | 687  |              | \$256,000                | 3/1.00 | 1952      | 1,014     | 7,735     | <u>14/14</u>    | Y    |
|          | <u>W11013481</u>      | A SFR/D                                     | 903    | Hartford PL       | POM    | 687  |              | \$258,000                | 3/2.00 | 1979      | 1,199     | 9,400     | <u>12/29</u>    | Ν    |
|          | <u>W11017389</u>      | A SFR/A                                     | 1765 S | Reservoir ST      | POM    | 687  |              | \$258,000                | 3/3.00 | 1992      | 1,608     | 3,851     | 4/4             | N    |
|          | <u>W11002443</u>      | A SFR/A                                     | 545 E  | Arrow             | POM    | 687  | <u>601A4</u> | \$259,000                | 3/2.00 | 1954/ASS  | 1,531     | 12,630    | <u>40/40</u>    | Ν    |
|          | <u>I11000676</u>      | A SFR/D                                     | 1984   | Bobolink WY       | POM    | 687  |              | \$259,900 🖊              | 3/2.00 | 1961      | 1,726     | 7,200     | <u>41/41</u>    | N    |
|          | <u>C11004151</u>      | A SFR/A                                     | 2153   | Kellogg Park DR   | POM    | 687  | <u>640E1</u> | \$259,900 🛧              | 3/2.00 | 1952      | 1,241     | 7,320     | <u>33/33</u>    | Υ    |
|          | C10132224             | A SFR/A                                     | 296 E  | La Verne AV       | POM    | 687  | <u>60053</u> | \$259,950                | 3/2.00 | 1954      | 1,552     | 5,620     | <u>48/48</u>    | N    |
|          | <u>C08150291</u>      | A SFR/D                                     | 1593   | Carol DR          | POM    | 687  | <u>601D6</u> | \$260,000                | 4/2.00 |           |           |           | <u>850/850</u>  | Ν    |
|          | C11001537             | A SFR/D                                     | 2013 W | Orange Grove AV   | POM    | 687  | <u>94 B2</u> | \$260,000 🕹              | 3/2.00 | 1956      | 1,110     | 7,320     | 40/40           | Y    |
|          | <u>C10085171</u>      | A SFR/D                                     | 752    | Fairfax LN        | POM    | 687  | <u>641A4</u> | \$262,900 🕹              | 4/2.00 | 1963      | 1,416     | 7,357     | <u>189/189</u>  | Ν    |
| P        | revious • <u>Next</u> | • [1] <u>2</u> • <u>Top</u> • <u>Bottor</u> | n      |                   |        |      |              |                          |        |           |           |           | 🛒 Carts         |      |
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|          |                       |   |        |                   |        |      |              |                          |        |           |           |           |                 |      |
|          |                       |   |        |                   |        |      |              |                          | 6      |           |           |           |                 |      |
|          |                       |   |        |                   |        |      |              |                          |        | Search se | lected fo | or [      | <b>_</b>        |      |

## **Searching for Agents and Offices**

Follow the steps in these sections to search for Agent and Office contact information in the Matrix Platform:

- Searching for Agents
- Searching for Offices

### **Searching for Agents**

Follow the steps below to search for Agents in the Matrix Platform.

1. Click the **Search** tab.

Г

2. Click the Yellow Pages link under the Agent Roster.

|                         | Home   | Search | My Matrix | Add/Edit | Finance | Roster | Realist Tax | Links | Help | Logout |
|-------------------------|--------|--------|-----------|----------|---------|--------|-------------|-------|------|--------|
| Agent Roster • Office P | Roster |        |           |          |         |        |             |       |      |        |
|                         |        |        |           | 0        |         |        |             | C     |      |        |
| Agent Roster            |        |        |           |          |         |        |             |       |      |        |
| Yellow Pages            |        |        |           |          |         |        |             |       |      |        |

| ©<br>First Name:<br>©<br>Middle Name:<br>©  | 0                                       | Address 1:                 | Q<br>Address 2:              |  |  |  |
|---|---|----------------------------|------------------------------|--|--|--|
| First Name:<br>②<br>Middle Name:<br>②   |   | Address 1:                 | Address 2:                   |  |  |  |
| 0<br>Middle Name:<br>0  |   | 0                          | 0                            |  |  |  |
| Middle Name:  |   |                            | 0                            |  |  |  |
| 0   |   | Office City:               | Office Zip:                  |  |  |  |
| A CONTRACTOR OF |   |                            |                              |  |  |  |
| Last Name   |   |                            |                              |  |  |  |
| <b>v</b>  |   | Office Email:              | Office Website:              |  |  |  |
| DRE License Number:   |   | V                          |                              |  |  |  |
| 0   |   | Broker ID:                 |                              |  |  |  |
| Association:  | Languages Spoken:                       | 0                          | 0                            |  |  |  |
| East Valley<br>Glendale   | Albanian<br>Amharic<br>C And © Or C Not | 1                          |                              |  |  |  |
| ther contact inform   | nation                                  | 4.6                        |                              |  |  |  |
| Cell:   | Home:                                   | Pager:                     | Email:                       |  |  |  |
| 0   | 0                                       | 0                          | 0                            |  |  |  |
| Direct Ofc. Phone:  | Toll F:                                 | Office                     | Website:                     |  |  |  |
| 0   | 0                                       | 0                          | 0                            |  |  |  |
|   |   | 0. 5                       |                              |  |  |  |
| ax:   | Voice:                                  | U. Fax:                    |                              |  |  |  |
| ther contact inform<br>Cell:<br>@<br>Direct Ofc. Phone:<br>@  | nation<br>Home:<br>0<br>Toll F:<br>0    | Pager:<br>Ø<br>Office<br>Ø | Email:<br>@<br>Website:<br>@ |  |  |  |

3. Use the available fields to search for Agents.

#### Note:

Enter a few letters for the first or last name followed by an asterisk (\*) to search for agents with a first or last name that begin with the letters you entered before the asterisk (\*).

4. Click **Search** to display a list of Agents that match your search criteria.

### **Searching for Offices**

Follow the steps below to search for Offices in Matrix.

- 1. Click the **Search** tab.
- 2. Click the Yellow Pages link under Offices.

| CRMLS                   | _      | _      |           |          |         |        |             |       |      | -      |
|-------------------------|--------|--------|-----------|----------|---------|--------|-------------|-------|------|--------|
| MATRIX                  | Home   | Search | My Matrix | Add/Edit | Finance | Roster | Realist Tax | Links | Help | Logout |
| Agent Roster • Office F | Roster |        |           |          |         |        |             |       |      |        |
|                         |        |        |           | 0        |         |        |             |       | •    |        |
|                         |        |        |           |          |         |        |             |       |      |        |
| 🍂 Agent Roster          |        |        |           |          |         |        |             |       |      |        |
| Yellow Pages            |        |        |           |          |         |        |             |       |      |        |
|                         |        |        |           |          |         |        |             |       |      |        |
| 🔍 Offices               |        |        |           |          |         |        |             |       |      |        |
| Yellow Pages            |        |        |           |          |         |        |             |       |      |        |
| Tenow Pages             |        |        |           |          |         |        |             |       |      |        |

3. Use the available fields to search for an Office.

| Yellow Pages Searce<br>yellow pages searce                                     | :h  |
|--|---|
| Office Code:<br>Office DRE:<br>Office DRE:                                     | Office Name:  |
| Association:<br>Arcadia<br>Burbank<br>Citrus Valley<br>East Valley<br>Glendale |   |
| ⊙ or O Not   |   |
| Display 1 Line   | 💌 at 25 💌 per page. 📄 🏷 Clear 250+ matches 🔍 Search |
| Additional Fields A  | 4   |

#### Note:

Enter a few letters for the office name followed by an asterisk (\*) to search for any office names that begin with the letters you entered before the asterisk (\*).

4. Click Search to display a list of offices that match your search criteria.

## Appendix

## www.CRMLSMobile.com

### Accessing Listings, Contacts, Saved & Favorite Searches, Open Houses, Agents, Offices ... on your Small Screen Smartphone Devices.

Note: Your iPad can use www.SRAR.com .

Follow the steps below to get started.

- 1. Open your mobile phones internet browser and navigate to http://www.CRMLSMobile.com.
- 2. Enter your Login User ID . ex: F123456789
- 3. Enter your Password. (same as for CRISNet Matrix logon).
- 4. Click the Login button.
- 5. Begin your search.

### Note:

Your wireless carrier may charge extra for internet usage on your mobile device. Please contact your wireless provider for internet data rates and charges.

### **Computer Minimum System Requirements**

In order to access Matrix, your system should meet these minimum requirements:

| Operating System:    | Windows XP, Windows Vista, Windows 7 or Mac OS X                              |
|----------------------|---|
| Internet Connection: | 56K Modem (DSL, Cable Modem, or other high-speed Internet access recommended) |
| Web Browser:         | Internet Explorer 7.0 or later, Firefox, Safari, or Chrome                    |

### Note:

To check your version of Internet Explorer, click the **Help** menu and select **About Internet Explorer**. If your version is not 7.0 or later, click the **Tools** menu and select **Windows Update** in Internet Explorer.