

MATRIX QUICK REFERENCE GUIDE

What is an Auto Email and how do I set one up ?

In Matrix, the Auto Email function allows users to select a custom criteria which enables Matrix to automatically send emails that match the chosen criteria to your client.

How to set up an auto email

1. Search- Residential (You can choose to select any other property type as well)
2. Select the criteria as required by your client
3. Hit the "Results" button
4. In the button navigation bar, click "Save"> "New Auto Email" (Note: If the New Auto Email button is greyed out, you have more than 350 listings. You must refine your search to return less than 350 listings)
5. Any fields that are yellow are mandatory fields and must be filled in order to proceed.
6. The client that you are sending the auto email to, **MUST** be a contact in the system. If the client is not currently a contact in the system, simply click on the "Create a new contact" link.
7. Fill out all fields and click "Save"

Important Information for Auto Email:

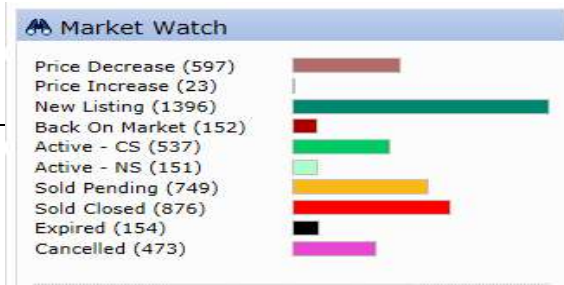
Concierge Mode- Enabling this allows you to be a Gatekeeper for the listings. Once the Auto Email is set up, every time a new listing comes up, Matrix will notify you first before your client gets the email.

Reverse Prospecting- The ability to view listings of all REALTORS® who currently have a client set up on Auto Email that matches your property.

The results that appear will display the prospecting agent's name, email address, office name, office phone number and the number of listings (including yours) that have been sent to their client. It will not show the client information.

Market Watch Widget

- Quick Snapshot of all changes made to listings
- Click the change type to see all matching listings for that change type
- Select a different Property type using the Dropdown
- Change the Time Period you wish to view by using the Dropdown
- Customize the criteria using the customize link



What are the Special Characters for Searching ?

Asterisk(*) is a wild card & can be used anywhere in text (Street search/Remark Search)

- *end*
- Start*
- Start*end
- *contains*

Comma-used to allow multiple entries in search

- 4,5,6-10
- 1234567,7654321(Separate MLS® numbers by commas)

Remarks (public or private) ?

inlaw*, *in-law*

Status Definitions

| | | |
|----------------------|-----|---|
| Active | A | Active Listing |
| Active ----CS | ACS | Conditional Sale—Continue to Show. Sold conditional and are available for showings |
| Active---- NS | ANS | Conditional Sale—No Showings. Sold conditional and are not available for showings |
| Pending Sale | P | Listings that have firmed up but not have closed |
| Sold Closed | S | Listings that have closed- New owners have taken possession |
| Cancelled | C | Listings that have been cancelled |
| Expired | X | Listings that have expired |
| Suspended | SU | Listings that have been suspended (Cease action) Not available for showings for a set period of time. |
| Incomplete/ Incoming | I | Saved listing for editing at a later date. Not Searchable. |

Property Types

| | |
|----------------|---|
| Residential | All residential properties. Freehold and Condominium |
| Land | All vacant land |
| Commercial | All commercial listings either for the actual building and property for the sale of business only |
| Farm | All agricultural properties |
| Multi-Family | Multi-unit Properties. Example: Duplex/Triplex |
| Cross Property | Not a listing type, but a search type that encompasses all property types in a single search. |

Team Settings:

The team setting allows you to log into Matrix using your codes and switch to “work as” another MREB member.

- 1) Simply go to My Matrix> Settings> Team Settings.
- 2) From here you can click on the “Create a new team” link.
- 3) Next, enter in the MREB member’s board ID and click “Find”. You can then choose to have this person “work on your behalf” which means every time they send an email working as you it would say “Sidra Kamal working on behalf of Sarah Keller” or you can choose to have them “impersonate” you, meaning it will appear that they are still sending the email regardless.

Adding a HOT SHEET:

1. Click “ADD” on the Manage Hot Sheets Screen
2. Click “CUSTOMIZE” on the Hot Sheet Widget
3. Select the type of property for the Hot Sheet
4. Enter a name for the Hot Sheet
5. Click “SAVE” to add the Hot Sheet

Customizing a Hot Sheet

- 1) Click “CUSTOMIZE” on the Hot Sheet Widget
- 2) Click on the HOT SHEET to customize and click “EDIT CRITERIA”
- 3) Set the criteria for the hot sheet
- 4) Click “SAVE”
- 5) Click “DONE” to return to the home page