MLS Basic

Log in to the MLS through dashboardmls.com. Enter your user ID and password provided to you when you joined the association. This will bring you to the ***dashboard*** with the various products and services offered to you by RPCRA. See below for a description of each area of the dashboard along with each tool.

Pay Your Bill	Pay your association due, MLS dues, and other invoices.
Realtor® Store	Purchase signs,
Orientation	Find links to all required courses including New Member Orientation, Code of Ethics, MLS Compliance, and Contracts.
Event Calendar	Register for CE classes and other events.
Update My Profile	Complete your profile.
Education	Find all available upcoming education.

Core Tools – Member Benefits

	Go To MLS	Matrix is your MLS Database System. This is where you will enter and search for listings, email listings to customers, and more. There are tools to track activity in a market area, run market stats, and market reports. Matrix also includes public records data for the counties in our area.
	Form Simplicity	Form Simplicity is a free transaction management platform provided to you as a Florida Realtors® member benefit, to create transactions efficiently, while mitigating risks. Create time-saving templates, groups of frequently used forms, with pre-populated data. Import data from the MLS. Form Simplicity's automation tools reduce typing and increase productivity. eSign, Form Simplicity's electronic signature solution, saves countless hours by quickly capturing signatures.
	ShowingTime	ShowingTime automates the process for setting and requesting showing appointments. ShowingTime allows you to quickly request showing appointments without having to play phone tag and can even prompt feedback once the showing has been completed.

	MLS Advantage	A Florida Realtors member benefit, members can find all listings that match search parameters from participating MLS boards with a single search. Property listing information can be auto populated from MLS Advantage directly into contracts in Form Simplicity.
	Realtors Property Resource (RPR)	RPR is an owned subsidiary of NAR. It is a comprehensive database that is provided to NAR members at no cost. Features include listing presentations, prospecting, investment analysis, buyers' tours, relocation information, seller's reports, market activity reports, neighborhood reports, school reports, and more.
	Realist	Realist is your tax and public records database.
	Agent 3000	. Agent 3000 is a comprehensive lead generation platform. Create unlimited custom landing pages, single property websites, stunning flyers, and more.
	Remine	Through Remine, you can use a variety of data and predictive analytics to locate individuals most likely to buy or sell. You then have tools to quickly engage with those individuals such as the ability to build lists, export data, create labels, and send mailers.

Supra	The Supra real estate lockbox system allows real estate agents to efficiently market and show listed homes.
Broker Command	A Cloud-based resource where brokers will find recruiting tools to pull reports including market share, office & agent ranking, productions stats, inventory, area sales comparison, and absorption rates. Broker Command adapts to display perfectly on computers tablets and smartphones.
Market Stats	InfoSparks is a housing market research tool designed specifically for ease of use, fast analysis, and simple sharing. All real estate is local. You can quickly and easily explore your housing market from your MLS Dashboard. More information is provided below.
Builders Update	Not all new construction is in the MLS and there is sometimes a disconnect between the Real Estate and Building Industries. Builders Update is a national database of new construction. In addition to search features, agents have a link to a branded site where their customers can search for new construction.
My Undercover Agent	Offers quick access to hyper-local data to nurture new leads, service existing customers, or forge long-term relationships after closing. RPCRA members have free access to My Undercover Agent and 30 days of free access to the Pro version.

	ePropertyWatch	Surveys consistently show that a substantial amount of a seasoned agent's business comes from referrals and repeat business from past customers. ePropertyWatch allows you to send both past and prospective customers a monthly report full of information on their home and neighborhood with up-to-date information on their home's value, nearby listings and transactions, local trends, and more.
	Realtor.com	Offers lead from buyers actively searching for their next home in your market, combined with software that can help agents and teams capture, communicate, and connect with leads. Get in front of serious buyers searching on realtor.com® then follow up with ease. Connections Plus gives you the ability to build your business the way you want, with flexible options to fit your budget.
	RentSpree	Tenant Screening Services for Agents & Landlords. Get tenant screening services with trusted credit bureau TransUnion Smart Move that include Full Credit Report & Score, Criminal Background Check, and Eviction Report. Tenant screening services are free to real estate agents and owners. Applicants pay the application fee directly to RentSpree when they apply so you never have to collect or handle any money from renters.
	ListTrac	ListTrac gives listing agents analytical tools to track and market their listings. Through ListTrac, reports can be run on the exposure a listing is receiving on various third-party and IDX sites. Measure the online success of your listings by viewing the number of leads generated, views, times a listing is shared, and other metrics.

IMPORTANT RESOURCES

	FGCMLS Training on Demand	Find short 'how to' training videos, product demos, pre-recorded webinars, product introductions, and other useful information about navigating Matrix and other member benefit products and services found in the Core Tools section of the FGCMLS Dashboard. New videos are released weekly, so please subscribe to the channel to stay informed. youtube.com/c/FGCMLSTrainingOnDemand
	MLS Clear Cooperation Policy 8.0	For years, REALTORS® have debated the risks and merits of so-called pocket listings, "coming soon" listings, and listings that are marketed on private networks rather than being shared cooperatively through a local MLS. Advocates say that sellers' desire for privacy and advances in technology have led to the expansion of these off-market listings. Others believe that keeping listings off the MLS reduces buyers' choices, skews market data, and may not be in the sellers' best interests. The link provides you with detailed information.
	2022 MLS Rules and Regulations	Read, print, or download the pdf document containing the current rules and regulations.
	MLS Training	Home to the MLS Training Video and Forms Library. You will find short topic-specific how-to videos, complete class/webinar recordings, member benefit videos, and videos on specific rules and regulations. All MLS forms are available here as well. It is a one-stop shop for answers to frequently asked questions. Avoid playing phone tag to get the answers you are looking for. Find them here. Many of the videos are less than 3 minutes! New videos are added weekly.

Additional Resources

	RPCRA.ORG	Quick link to Royal Palm Coast Realtor® Association's website.
	Florida Realtors®	A link to Florida Realtors® is conveniently located on your dashboard.
	Market Reports	Quick link to Market Reports in our MLS.
	eCommission	eCommission provides payment of your future commissions from pending sales and active listings whenever you need them. Instead of waiting for closing dates up to 120 days to be paid, eCommission funds your commissions on your schedule.
	RPCRA YouTube Channel	Stay up to date on the latest association news and information. Subscribe at youtube.com/c/rpcraorg

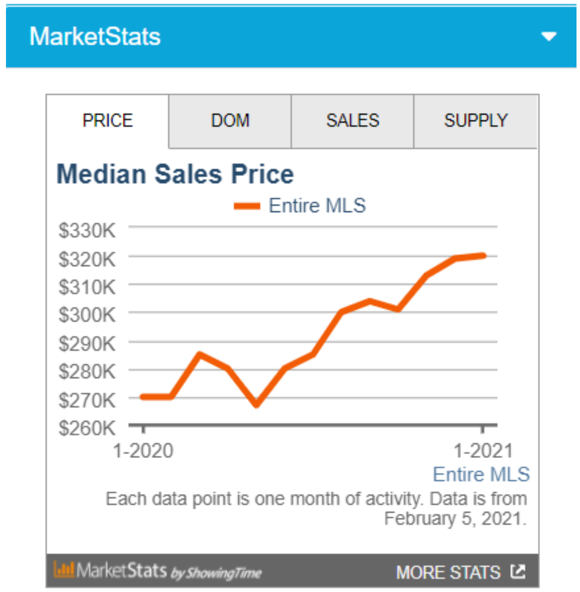
	Florida Realtors® Market Reports	All the real estate metrics, charts, and data you need to master your market — branded to YOUR business and accessible on desktop, laptop, and mobile.
	RatePlug	Qualify more buyers and close deals faster. Showing rates from your lenders helps to ensure that buyers are getting financing from someone you trust. Click the link to learn how to invite your favorite lenders to join RatePlug.
	Cape Coral Zoning Map	Cape Coral Geographic Information System. Find Cape Coral zoning codes, zoning descriptions, strap, and site address information, future land use map,
	Facebook	Connect with the Association on Facebook. https://www.facebook.com/RoyalPalmCoastRealtors/
	Virtual Open House	myopenhousesearch.com A port for consumers and Realtors® to search for upcoming Open House events.
	NAR Member Resources	Maximize your membership benefits and find all the NAR information you need including member benefits, dues, membership information, education, new events, and more.

Mobile App Downloads

	MLS Touch	MLS-Touch puts your MLS in the palm of your hand! It's the most advanced mobile app for Agents, with loads of features to keep you connected to listings and engaged with your leads and clients from wherever you are.
	Remine	Remine Mobile is an extension of the core application, providing many of the same functionalities as the core application, and will serve the busy on-the-go Agent.
	RPR	RPR Mobile™ is a property research app exclusively for REALTORS®. Easily search properties, create and send branded reports, and view local market statistics, anytime, anyplace. Use your location to view nearby listing and sales activity or take a deeper dive into any property and view tax, mortgage, historical and distressed data, flood zones, school info, dynamic mapping, and more. With RPR Mobile, you'll have the confidence of knowing you can find the answer, whenever your clients ask the question.
	ShowingTime	ShowingTime's features are accessible in a mobile app.
	Matrix Mobile	MLS Touch is a mobile app with both an agent and consumer interface. Search f for listings, share listings with a customer, get driving directions, contact listing agents, access public records, and more, from your mobile device. If you share the app with a customer, that customer can search for listings on their mobile device and see your branding.

ShowingTime Appointment Center

	Feedback Received	Find feedback from agents who have shown your listings.
	Feedback Requested	Request feedback from agents who have shown your listings.
	Confirmed Appointments I’ve Requested	A quick link to view confirmed appointments you have requested for showing.
	Confirmed Appointments on My Listings	A quick link to view all confirmed appointments set to show your listings.



Provided by InfoSparks

InfoSparks is a housing market research tool designed specifically for ease of use, fast analysis and simple sharing. All real estate is local. You can quickly and easily explore your housing market from your MLS Dashboard.

Highlights of what you can do with InfoSparks:

- compare up to four geographies at a time
- filter search results by countless housing variable combinations
- examine housing market metrics as counts, medians and averages
- customize price and square footage ranges
- use it on your mobile device
- share search results online, in print, via email and even with live data widgets!

Matrix Navigation

When you first launch Matrix, you are brought to the My Matrix Dashboard. The dashboard has widgets, which give you a snapshot of your activity in Matrix. These widgets can be re-arranged by hovering over the header until you see the gridline symbol ✣. You can then click and drag to move the widget. You can also minimize a widget by hovering over the corner and clicking the [X] icon. When you minimize a widget, it goes into the "Additional" Widget on your home page and can be dragged back onto the page at any time.

Home Page Widgets

News & Alerts – FGC MLS posts updates here, which could include information on system enhancements, new products, rule changes, upcoming training, etc.
Market Watch – This tool tracks changes to your market area over a specified time. You have a Market Watch for each type of property classification (residential, commercial, rental, etc.), and can set the time frame to 24 hours, Today, 3 days, or 7 days.

- By default, the Market Watch pulls all MLS status changes over that time frame, but if you click customize, you can set a specific market area.
- Under the Market Watch widget, you can click on each type of status change to see the new listings, price decreases, recently pending listings, recent sales, newly expired listings, etc. foryour area over the time frame you select.

Hot Sheets – Similar to Market Watch, Hot Sheets also allow you to track changes to your market area. However, instead of focusing on a particular status change type for a single market area, Hot Sheets give you a master list of all status changes for up to 10 market areas.

- As a default, you have a Hot Sheet for each type of property (Residential, Commercial, Income, Vacant Land, Rental, and Cross Property). By clicking "Customize", you can rename, edit, or delete existing Hot Sheets and create new Hot Sheets. To create a Hot Sheet, once you go to the Customize link, select "Add".
- Choose the type of property for the Hot Sheet (Residential, Vacant Land, Rental, etc.), and then name the Hot Sheet. Once the Hot Sheet is named, then click "Edit Criteria" to program the Hot Sheet for your market area. When finished, click "Done".
- Once you are back on your main page in Matrix, go to the Hot Sheets widget and select your newly created Hot Sheet and desired time for a list of changes.

My Favorite Searches – When saving a search in Matrix, there is an option to have the search appear under the "My Favorite Searches" widget. If selected, up to 10 saved searches can then be displayed by the widget.
My Listings – Here you can access your Active, Incomplete, Pending, expiring, and recently closed listings, along with listings from your office.
My Carts – You can save listings into your cart, or a cart for one of your customers, and then access the carts from here.
My Stats – Under the Stat tab, you can run various market statistics and then save the stats presets here.
Concierge – When creating an auto email in Matrix, there is a setting for Concierge Mode. If this is selected, when a new listing hits the market matching a customer's criteria, the agent gets notified first and then reviews the listing to decide whether to send it to the customer. Listings in Concierge mode are reviewed under this widget.
Recent Portal Visitors – When a listing is emailed to a customer in Matrix, the customer is sent a link into an interactive

portal to view the listing and can mark the listing as a favorite or possibility. This widget shows which customers were recently in their portal, and if they favorited or marked any listings as possibilities.
Recent Use Contacts – This widget shows which Matrix contacts have recently had their records updated or have been emailed.
Contact Requests – Matrix offers agents an Agent Web Page, and one of the elements of that page is a Contact Request form. If a consumer fills out a contact request, information on that request will show up here.
External Links – A variety of commonly accessed hyperlinks can be found here, including links to MLS forms, other MLS tools, RPR, and more.
Additional – If you minimize a widget, this is where it shows up until you drag it back on your home page.

Menu Tabs in Matrix

The following tabs can be found across the top of the page in Matrix.

My Matrix – This is where a variety of Matrix settings can be configured and managed. You can manage your contacts, view your listings, save searches, auto emails, CMAs, carts, etc.

Search – Under this tab, a wide variety of searches can be run.

Stats – Various market statistics can be generated here and saved to the home page My Stats widget.

Links – While the External Links widget on the Matrix home page provides quick access to commonly used hyperlinks, the Links tab provides a more expansive selection of links. Categories include MLS Links (bill payment, forms, rules, etc.), Information and Contacts (Realtor® Association pages, property appraiser sites, zip code maps, FEMA Flood Zone Definitions, etc.), Services and Tools, FGC MLS Education resources, and more.

Realist Tax – This tab provides links to Realist, the tax, and public records databases.

Finance – The Finance tab contains a variety of mortgage calculators, a net sheet generation tool, and a buyers closing cost estimation tool.

Input – This is where you will enter and modify listings.

Basic Searching

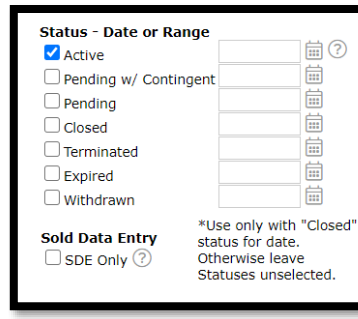
-Residential -Commercial -Residential Income
-Lot and Land -Boat Dock -Residential Rental
-Cross Property *(any property classification in a single search)*
-Agent -Office -Open House
- History - Public Record

For each property search form, there is a Quick and Detail version. The Detail version has additional fields shown by default, such as garage/parking features, water fields, and green energy fields but both forms return matching results at the same speed.

Status Field

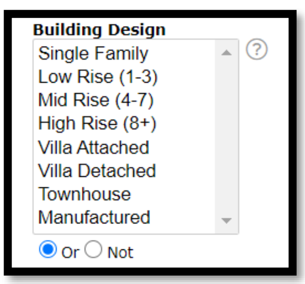
Under the status field, Active is checked as a default. If you select any status that is not Active, the default date range is 0-180 (this pulls listings placed in that status in the past 180 days). This can be changed.

For example, 0-365 pulls listings placed in that status a full year back while 0-30 is for one month back. As an alternative, you can also enter a specific range of dates such as 9/1/2020-9/30/2020.



Building Design Field

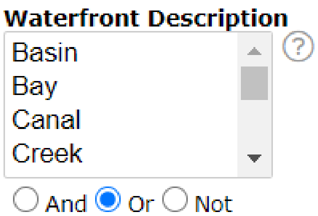
Select the building design you are searching for here.

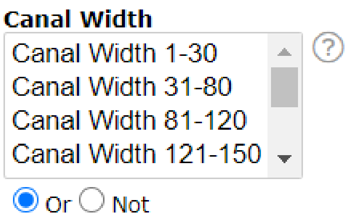


For any picklist field (Such as the above example, Building Design) select more than one option, select your first option and then hold the control key down when you select the second option (command key for Mac).

Use the "Or', or "Not" radio buttons to indicate if you want any of the options to be true [Or], or none of them to be true [Not].

The ***Waterfront*** and ***Gulf Access*** Fields offer 'Yes', to search for homes with these amenities, or 'No' if you do not wish to search for them. If it does not matter whether the results have these amenities, simply leave the fields blank.





The ***Waterfront Description*** allows you to specify the types of bodies of water for which you are searching.

As stated before, to select more than one item hold down the CTRL key (Command key on Mac) on the keyboard while clicking on the desired items with your mouse.
To remove a selected item, hold down the CTRL key (Command key on Mac) on the keyboard while clicking with your mouse and the item will deselect.

If your customer is searching for a home on a canal, the ***Canal Width*** field gives you options based on your customer's preferences.

Current Price and ***List Price*** (You may choose either option, but you do not need to choose both. There is no difference in the results returned regardless of which box you use.

For most search forms (except for rental), prices are in the thousands. There are four ways to search for listings by price. <u>Exact Number</u>: For a property that is exactly $300,000, enter 300.

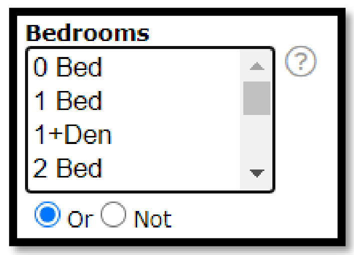
<u>Minimum</u>: For properties that are $300,000 or more, enter 300+.

<u>Maximum</u>: For properties that are $300,000 or less, enter $300-.

<u>Range</u>: For properties between $300,000 and $350,000, enter 300-350.

Bedrooms

The Bedrooms field works like other picklists mentioned above.

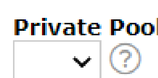


Baths Full

Other numeric fields such as Baths Full, Living Area, Acres, Year Built, and # Garage Spaces work the same way as the price field. You can enter an exact number, minimum, maximum, or range.

Private Pool

This is a 'Yes' or 'No' option. If your customer has no preference, leave it blank. This will Bring results that may or may not have a private pool.



Geographic Fields

In the center of the search forms, you can search by a variety of geographic fields, including address, county, zip code, city, or subdivision.

<u>County</u>: Select the county where you are searching for listings from the picklist or type its name into the field. To select more than one county from the list, hold down the control key (or command key in a Mac) or you can separate multiple typed entries with commas. Additionally, you may click the search icon to search for and add counties by name.

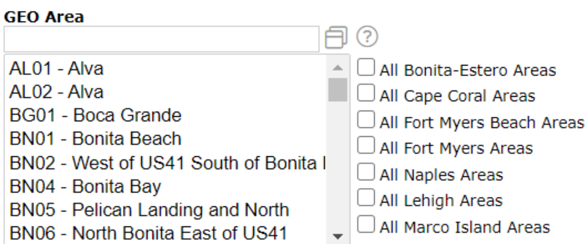
<u>MLS Zip</u>: Either type in the zip code(s) or click the search icon to search for zip codes by city. To enter more than one zip code, put commas in between them. You may also add a range of zip codes using a dash between the lowest and highest number. If you would like to exclude a zip code from your search, select the Not button underneath the zip code field.

<u>City</u>: Enter the city or cities where you are searching for properties, and each will be displayed in the list. To remove a city, from the list, click the X to the right of its name. To exclude a city from your search, select the Not button.

Development Name:

You can drill your searches down to a particular subdivision but make sure you know the proper name of the subdivision. Sometimes less is more. Suffixes such as “Ph 2” might narrow your search down too much. You may want to consider putting an asterisk on both sides of the subdivision name: This is a wild card search and will pull any listings meeting your other criteria that contain that subdivision name.

Searching for Multiple Cities:

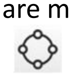


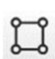
Map-based Searches

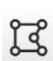
Instead of using geographic fields, you may prefer to conduct a map-based search. This gives you the flexibility to draw the exact areas on a map where you wish to search. Be careful that the criteria on your search form do not cancel out the area you draw on your map. For example, if you have Lee County selected on your search form and then draw a map area in Collier county, no results will show up.
On the top right corner of the map, there is a “Jump to Address” bar. In this bar, you can enter a city, zip code, or

specific address/location, and the map will be centered based on the criteria entered.

There are multiple map tools on the top of the screen.

 Radius Drawing Tool – Center your map on a specific location, and then draw a search radius from that location. For example, your buyer wants to be 3 miles from their work.

 Rectangle Drawing Tool – Draw a rectangle on the map to find all listings matching your criteria within that rectangle.

 Polygon Drawing Tool– Draw a polygon, tracing specific boundaries. Click on your starting point on the map, and then click on each corner. Always end your shape at the same point where you started it.

 Freehand Polygon– This is ideal for tablets or touch screens. It allows you to trace an area on the map.

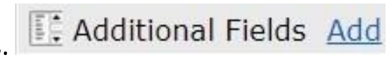
Note: When you click the red dot associated with a shape, you have the option to include or exclude that shape from your map or the intersection of two or more shapes if they overlap.

 Clear Map Shapes – Erase all the shapes drawn on the map.

 Map Layers – This allows you to overlay a variety of different information to the map without changing your original search criteria.

 Recenter Map – Recenters the map view and zoom level to show all properties matching your search.

Adding Additional Fields

At the bottom of each search form, there is an option to add additional fields. 

If you click "Add", you are given a list of all available fields in Matrix and can select which fields you want to be added to your search form. You can select fields directly from the list or use the search bar to search for a field by name. Once selected, click the "Add" button and then click "back" to return to the search form and enter your criteria. Adding additional fields is discussed further in our "Working with Buyers Class".

Results Grid and Listings

Once all your search criteria are entered, click the "Results" button at the bottom of your search form or the tab along the top. This will pull up your results grid. Results can be sorted by a particular column by clicking on that column's header, or manually re-ordered using the drag-and-drop icon  (if all listings appear on one page). There are several icons on the results grid. You can hover over these icons to see what they do.

From the results grid, you can also get a glance at the MLS number, Status, Address, Subdivision, Living Area, Price, Bedrooms, and Bathrooms.

By clicking on an MLS ID, you can enter the listing. The default display is the 360 Property View which integrates both listing and public records data, but this can be changed under the "Display" pulldown menu. There are various customer displays and flyer displays available.

The 360 Property View is divided into the following parts:

Listing Tab

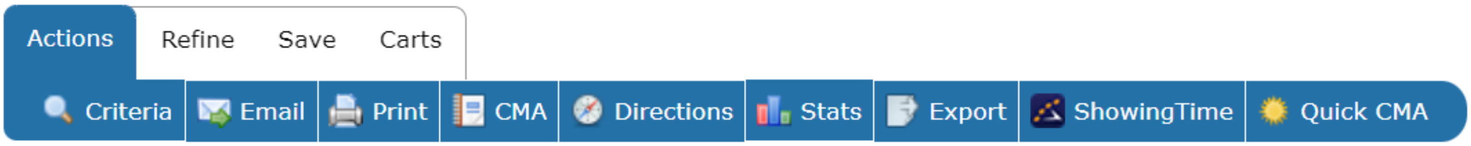
- <u>Summary Section</u> – Photos, County, Subdivision, Status, Price, Bedrooms, Bathrooms, Active Days on Market, Square Footage, etc.
- <u>Land, Site, and Tax Information</u> – Taxes, Legal Description, Lot Size, Water Frontage/Access/View, etc.
- <u>Interior Information</u> – Utilities, Interior Features, Room Dimensions & Features, etc.
- <u>Exterior Information</u> – Exterior Construction, Roof, Exterior Features, etc.
- <u>Community Information</u> – HOA/Condo Fees, Pet Restrictions, Lease Restrictions, Community Amenities
- <u>Confidential Information</u> – Listing Agent/Office, Listing Type, Offer of Compensation to Cooperating Brokerage, Showing Instructions, Driving Directions, Realtor Remarks
- <u>Driving Directions</u>

Other tabs include Tax (basic public records info), Photos (MLS photos), History (both sales history and MLS listing history), Parcel Map (including a "walk the block" feature to click on neighboring properties for information), a Flood Map, and if applicable, a Foreclosure tab.

To return to the results grid, click on the link that reads, " Single Line display."

Working with Search Results
Underneath the results grid, there are four menus, each with buttons to perform different actions.

Actions Menu



The Actions menu features functions such as emailing, printing, running driving directions, launching a CMA wizard, running statistics, exporting the data, requesting bulk showings, and creating Custom PDF Reports.

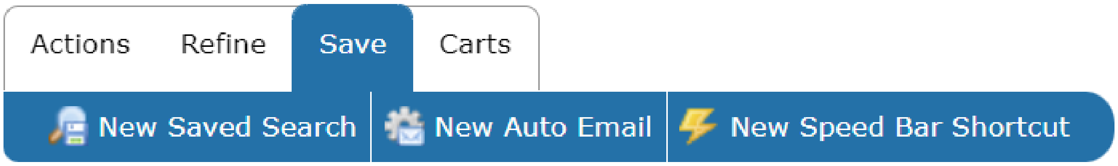
- Email: Send a one-time email with selected listings. Customers are sent a link to their Customer Portal (discussed in the next section) to view the listings. This is not an automatic email where the customer will be sent updates from the system. To set up an automatic email, go to the Save menu.
- Print: Print selected listings. You can choose a variety of displays to print and select whether to include a header and footer. Listings can be printed on paper, PDF, or emailed as a PDF attachment from this button.
- CMA: This button does not produce a CMA for an individual listing. Instead, if you search for comps for your subject property, you can select multiple comparable listings and then click this button to launch a CMA wizard. (Discussed in CMA Tools class.)
- Directions: Run driving directions between listings. Reorder the listings and add custom starting or stopping points. Print the directions or email them directly to your customer.
- Stats: Run summary statistics on the listings in your search.
- Export: Export the results grid in .csv format (comma-separated values) to open in another software program such as Microsoft Excel.
- ShowingTime: Launch multiple listings into ShowingTime to request showings.
- Quick CMA: Like the CMA button, this button requires you to search for comps for your subject property. if you select the comps and then click Quick CMA, a basic PDF report will be created showing each comp (sorted by status) and giving summary statistics by status. This is covered in our CMA Tools class.

Refine Menu

The refine menu allows you to narrow your search and also see which contacts you have already sent listings to.

- View As: Select a contact from the pulldown menu to see if you have already emailed that contact any of the listings from your search.
- Narrow: Narrow your search to only the listings you select.
- Discard: Discard any listings you select.
- Sort: Sort your results by multiple levels.

Save Menu



The Save menu allows you to save a search, create an Auto Email, or create a Speed Bar Shortcut.

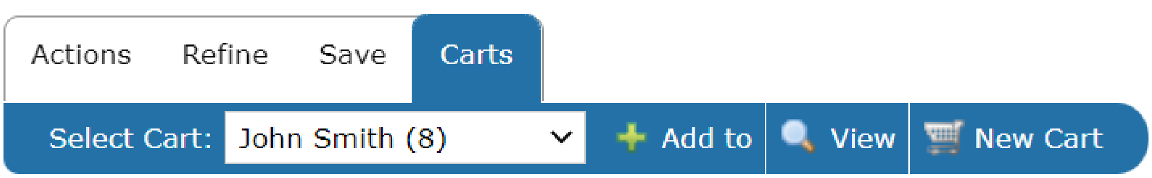
- New Saved Search: Save the criteria of this search to run in the future. Note that when the saved search is run later, the most up-to-date results matching those criteria would be pulled. There is a check box to enable the search as a favorite on the Home tab if you want this search to appear on your home page of Matrix.
- New Auto Email: Set up an automatic email. Your customer will not only be emailed the initial search results but will also be sent updates when a new listing hits the market that matches their criteria.

Select your contact and choose whether you want to be Bcc'd on the email. Enter a subject. For the welcome and recurring message, you are given default text but can modify the text. The welcome text is what goes out with the first email. The recurring text goes out in subsequent emails. To set your custom text as a new default, click on the gear icon in the bottom corner of the text box.

Under the Settings section of the auto email wizard, if you select "Enable Concierge Mode", any listings will be sent to you first, for approval. If this is not selected, the Schedule section is the Matrix default. You may modify the selections for the scheduled emails & choose how often you want emails to go out. The options are ASAP, Daily, or Monthly.
There are also display options to Enable the search criteria as a Favorite Search on the Matrix Home Tab (if you want the search that corresponds to the email to appear on your home page in the Favorite Searches widget).

- New Speed Bar Shortcut: Create a shorthand name for this search that can be used in the Speed Bar on the top of the screen in Matrix.

Carts Menu



Under the Carts menu, you can create a "cart" and save listings in that cart. Multiple carts can be created. A cart can be tied to a customer record, but customers cannot see listings you place in a cart. Carts serve as a file folder for listings you want to view later, and the listing will always show up in the most up-to-date status. Carts can be accessed from the Matrix Home Page under the "My Carts" widget, or under the "My Matrix" tab under "My Carts".

Customer Portal

When you email a customer through Matrix, the customer is sent a link to their portal site. The portal is automatically generated when you send an email, but the next section of this document will discuss how to personalize your customers' portal sites with your information.

The portal has five tabs:

Find a Home – Your customer can conduct and save their searches here. Anything they find will be branded to you. My Searches – Here is where your customer will access the results of searches/emails that you have set up, along with the results of their own saved searches.

Favorites – Here is where your customer can access the listings they marked as a favorite.

Messages – Here is where your customer can access any notes they left on a property and your replies to those notes.

My Agent – Here is where your customer can see your portal information (to be discussed in the next section) and portal greeting. When the customer first goes to their portal, they are brought to this tab.

When your customer goes to view listings in the portal, they are given a thumbnail display. By clicking on the address of the listing, they can see the Customer Synopsis Report. Only customer-friendly displays are available in the portal, without any listing brokerage information, showing instructions, etc.

By clicking the heart icon in the thumbnail display, your customer can favorite a listing , mark it as a possibility , or discard a listing. the listing, there is a notes section for your customer to leave you a message through the portal. You can set up notification preferences to be notified when your customer uses one of these portal functions.

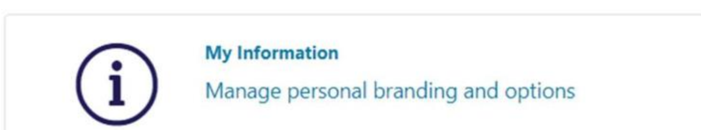
Remember, under the Recent Portal Visitors widget on your home page, you can see which of your customers have recently been on their portal sites and if they favorited any listings or marked listings as a possibility.

Under the My Matrix tab, if you go to your Contacts, you can see each of your contacts' last portal visit, along with any listings which they favorited, marked as possibilities, discarded, or annotated.

To be notified by email, text, or to receive a daily email summary when a customer visits their portal, saves a favorite, saves a possibility, discards a listing, leaves a note, etc., click your name near the upper right corner of Matrix and select 'Settings' from the dropdown menu. From the available sections on the next page, choose "Portal Notification Settings".

Personalizing / Branding Matrix

My Information Section – Click your name to the right of the Notification Icon and select Settings from the menu. Then click the My Information section where several personalization settings can be configured.



- Information – Your name, title, phone, office, email, website, tagline, etc. can be updated here. Please note that if your name or contact information ever changes ensure that your local Realtor® board has your most up-to-date information on file as well. The information here is only what shows up in the customer portal, not on listings and external products.

- Header & Footer – Create a header to show up in your customer's portal and on your agent web page. Select from a variety of default headers or upload a custom header. Upload a photo to appear in your header. Choose up to five lines of text to appear in your header, and set the background color, text color, and transparency level of the background color. Then choose whether you want to include a footer and if so, choose up to four lines of information to include in the footer along with the footer color scheme.
- CMA Cover Sheet – Create a cover sheet for when you develop CMAs through the Matrix CMA wizard. Upload a photo and add your information.
- Email Signature – Create an email signature for when you email listings out through Matrix. If you would like to

  To add a photo to your email signature, click the image icon. You can either select the image from your CMA Cover Sheet tab, or the photo uploaded through the Header & Footer tab.
- Agent Webpage – Matrix gives you a free web page template. This is discussed in the MLS Marketing Tools class.
- Portal Profile – Upload a photo to appear on your customers' portal sites. Update the greeting that appears on the portal home page. Choose if you want your listings or your office's listings to appear on the portal home page. Add a YouTube video link and select which items of contact information you want to have displayed.

Adding a Photo to Input Tab - All agents have a profile picture in Matrix, which goes out to the MLS Agent Directory. To add or edit a profile picture, go to the Input tab and select "Edit Existing Agent". Type in your agent ID. You are then able to upload or change a photo.

Matrix Getting Started Checklist

After completing this course, you are encouraged to spend some time completing the following tasks in Matrix.

- Complete your Profile in the "Update My Profile" section of the login dashboard.
- Upload your Photo to the Input tab (if applicable)
- Personalize your Matrix settings by progressing through the tabs on the My Information area
  - Information
  - Header
  - CMA Cover Sheet
  - Email Signature
  - Agent Web Page (if you plan to utilize this tool)
  - Portal Profile
  - Photo, Portal Greeting, Inventory Slideshow Options, Video (if applicable), Contact Information
- Set up your preferred Portal Notification Settings
- Rearrange the widgets on your Matrix home page
- Customize your Market Watch and Hot Sheets
- Add contacts to Matrix
- Run searches in your farm area and save them to the My Favorite Searches Widget on your Matrix Home Page
- Practice emailing a listing to yourself. Click on the portal link in the email you send yourself to explore how the portal works.