MATRIX 6.3
UPDATES

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INTRODUCTION

This manual provides you an overview of the CRISNetMLS Matrix platform updates that were released in the September 2013 Matrix 6.3 update. For additional training documentation, please view the training material located on the CRISNetMLS web site at the link below.

http://srar.com/training
CITY SEARCH CONTROL

The County, City, and Area search fields in the CRISNetMLS Matrix platform have been improved to streamline the selection of counties, cities, and areas when searching for listings. The improved search control feature is available on the property search forms located within the Search tab.

To select multiple cities at once, enter a city name and then separate multiple entries with a comma – no space. Or go to the icon to the right of the field and make selections by typing in a city name and then adding one at a time. The same process can be done for county and area as well.

To limit the City field to displaying cities in a particular county, select a county in the County field. Similarly, to limit the Area field to displaying areas in a particular city, select a city in the City field.

To select multiple cities at once, type a comma separated list of cities in the city field.

You can also select multiple cities by holding down the control key in Windows or the command key on a Mac and clicking the cities you want to select in the city list field.
IMPROVED MAPS

Display more listings on Maps in the CRISNetMLS Matrix platform with Map Pin Clustering. In previous versions of Matrix, maps were limited to displaying up to 500 listings, with Map Pin Clustering, you can now display up to 5,000 listings on a map. Along with Map Pin Clustering, additional map overlays will help you to better visualize Realist map layers, zip code, parcel, and school district boundaries, parcel characteristics, trends, points of interest, and more directly in CRISNetMLS Matrix.

PIN CLUSTERING

When your map search returns more than 500 listings, they are displayed in map pin clusters.
To display the approximate area that the listings are located in, hover your mouse over a Map cluster. You MAY have to adjust the Zoom level on your map.

To display individual listings for a map pin, click pin to zoom in and display individual listings.

**MY LOCATION & JUMP TO ADDRESS**

Map searches in CRISNetMLS Matrix and CRMLSMobile.com just got easier with My Location. My Location uses GPS positioning information from your computer, tablet, or mobile phone’s current location to define a map search area in CRISNetMLS Matrix. Simply select a distance in the **Within miles of My Location** field on the criteria screen or select **My Current Location** in the Map’s **Jump to Address** field to display nearby listings on the Map.

**MY LOCATION & JUMP TO ADDRESS – DESKTOP VERSION**

The **My Location** feature on the desktop version of Matrix is available via a property search page.
When searching via the map view in Matrix, you can click into the new **Jump to Address** field and type in either an Address, a City, or a Zip Code. Additionally, you can click on the drop down menu and select **My Current Location** which will utilize the GPS functionality on your computer, phone, or tablet.

To enter a specific area name, zip code or address as your starting point, type the information in the field that will read “Jump to Address” that appears in light grey, click enter and your property or center of area/zip will be pinned.
MY LOCATION – MOBILE VERSION

You can also perform a search with the My Location feature when logged into Matrix Mobile on your phone or tablet via www.CRMLSMobile.com.

The My Location feature is available when performing a search. After selecting your desired search criteria, select the radio button and desired distance to perform a search near your location.

Note: Your computer or mobile device may prompt you for permission to share your location with Matrix. This permission must be granted in order for this feature to function properly.
NEW MAP OVERLAYS

The new CRISNetMLS Matrix platform map overlays will help you to better visualize Realist map layers, including zip codes, school district boundaries, parcel characteristics, trends, points of interest, and more. To access the new map layers, click on the map layer icon on a map search screen.
INTERACTIVE AGENT 1 LINE DISPLAY

The Agent 1 Line Display in the CRISNetMLS Matrix platform has been upgraded. The new Interactive Agent 1 Line Display allows you to fully customize your search results by allowing you to add, remove, and reorder columns, change column widths, and change column properties.

To change the name of a column or column properties, click the column and change the column’s properties as necessary and click **Apply**.

To add a new column, first click on a Column heading, then click **Insert Column**, select a field in the list, and click **Apply**.
To change the position of a column, click and hold the column then drag it to your desired location.

To save the changes you have made to the Agent 1 line display, click the Manage Display icon, type a name for your custom 1 Line grid, and click Save as a Copy.
SIMPLIFIED PRINT SCREEN

The Print Screen’s Primary and Additional Reports tabs in the CRISNetMLS Matrix platform have been consolidated into a single list, allowing you to quickly select displays and reports you want to print.

To print listings, click the checkbox next to one or more listings on the search results screen and click the Print button.
Select one or more reports from the print list, then click **Print to PDF**.

When the report appears, select the print option in your web browser or PDF viewer to print the report.
**AGENT INFORMATION MANAGEMENT**

Agent information that appears in the Client Portal, Agent Header/Footer, CMA Cover Sheets, and Emails is now located in one central location. By default, your displayed information is taken from the agent roster but can be overridden based on your preferences. To update your agent information, hover your mouse over the **My Matrix** tab and select **Settings**, then click **My Information**.

By default, the information you see is filled from the Roster information. Should you see any inaccuracies in the information displayed, it is recommended that you update the information via the Roster first at your local associations membership department.

**INFORMATION**

The Information tab will display your personal contact information. To override any of the information displayed, place a check mark in the Override field adjacent to the information you want to modify, then make the desired entry.

*Note: Overriding information on this tab will not update your Agent Roster.*
The Header & Footer tab will give you the option of selecting from the available templates that will display on certain reports, and in the client portal. You also have the option of disabling the header and footer by selecting the “I choose not to use a header/footer at this time” option.
After selecting a Header/Footer package, you will have the option to upload a photograph of yourself onto the Header/Footer package by selecting from the “Photo” option. Once you have uploaded your photograph, click Save.

CMA COVER SHEET

The CMA Cover Sheet tab will allow you to set your desired options for the CMA Cover Sheet, including uploading your personal photograph.
PORTAL INFORMATION

The Portal Information tab allows you to manage the information that you wish to display on your Portal welcome page. Use the drop down menus to select which information should be shown. Be sure to click Save after making changes.

EMAIL SIGNATURE

The Email Signature tab allows you to set your email signature which is added to the bottom of emails you send from the CRISNetMLS Matrix platform. After typing your Email signature, click Save to store your customized signature.
IMPROVED CLIENT PORTAL

The Interactive Client Portal allows you and your clients to view property information, categorize listings as favorites, possibilities, and discards, add client and agent notes to individual listings, and create your own property searches.

The Welcome screen contains multiple panels that allow you to view listings and reports, review listing notes, and start a new property search.

To view property information for listings that were automatically sent to the portal based on selected property search criteria (Auto Email), your client will click a link in the Auto Searches panel.

To view property information and reports for listings that were sent directly to a client from search results in Matrix, your client will click a link in the Direct Emails and Reports panel.
From the **Properties** tab, you can view listings in multiple display formats using the Display drop-down menu.

To view a listing, click the listing’s **ML Number**.

To add a client or agent note to the listing, click the note 📊 icon, and to categorize the listing, click the **Favorite 💘**, **Possibility 💡**, or **Discard 🗑️** icon.

Newly added and updated listings that are less than 72 hours old will be highlighted in yellow on the **Properties** tab.
To display a list of any unviewed listings, select “Show unviewed matches only” from the Listings drop-down menu.

To create a new property search, click the Welcome tab and select Start a new search.

Select search options, then click Search.
Enter a city in the **Jump to location** box, hit the enter key, then click a map pin or click the zoom in button to display matching listings.

To save the search in the portal and add it to the welcome screen, click **Save**, enter a name for the search then click OK.

To access a saved search from the Welcome screen, click the name of the search in the **My Searches** panel.
CLIENT PORTAL ACTIVITY & SEARCHES

All activity and searches created by your clients are logged within Matrix and can be accessed by clicking the **My Matrix** tab, **Contacts**, then selecting **Portal Activity** and viewing **Portal Searches**.
LISTING NOTES

In addition to viewing listing notes in the portal, you can also access them from Matrix by clicking the My Matrix tab, then click Auto Emails, next click on the name of the Auto Email you want to work with, and click the Results button.

Once you are on the results page, clicking on the note icon will expand the note and allow you to read any notes left by your client. You can also leave a new note for your client for each listing.

PORTAL GREETING

The new portal now allows you to post custom greetings to all your contacts portals and is displayed on the Welcome page. To customize the Portal greeting, click the My Matrix tab, then select Portal Greeting.
AUTO EMAIL IMPROVEMENTS

RESEND AUTO EMAIL WELCOME

When you create a new auto email for your client, it remains inactive until your client visit’s their Client Portal by clicking the link in the initial welcome email. If your client missed or accidentally deleted the welcome email, you can now resend it using the Resend Welcome feature in the CRISNetMLS Matrix platform. Follow the steps below to access the Resend Welcome feature.

1. From the My Matrix tab, click Auto Emails.
2. Click the name of the Auto Email you want to work with.
3. Click the Resend Welcome button. When clicked, the initial welcome email is re-sent to the contact associated with this auto email.

Note: Due to anti-spam considerations, the Resend Welcome button may be used only once per auto email activation. Following one use, the button becomes disabled and may not be clicked again.
IMPROVED NET SHEETS

The Buyer’s and Seller’s Net Sheets in the CRMLS Matrix platform now allow you to save and assign net sheets to your contacts, giving you the flexibility to recall and edit the saved information. To access the updated net sheets, hover your mouse over the Finance tab and select the net sheet you want to work with.
SELLER'S ESTIMATED NET PROCEEDS

Select a contact in the drop-down list or add a new contact by clicking the Create a New Contact link.

Click on the show details link to display additional fields.

To save the form, enter a custom name in this field.

To view and print the net sheet, click the View Report button. To save the net sheet, click the Save button.
BUYER’S ESTIMATED CLOSING COSTS

Select a contact in the drop-down list or add a new contact by clicking the Create a New Contact link.

To save this form, enter a custom name in this field.

To view and print the net sheet, click the View Report button. To save the net sheet, click Save button.
ACCESSING SAVED NET SHEETS

Follow the steps below to access saved net sheets:

1. Hover your mouse over the My Matrix tab and select Contacts.
2. Click the name of the contact you want to work with.
3. Click Netsheets.
4. Click the saved net sheet, then click the Open Netsheet button.
Creating CMA Reports in Cloud CMA from the CRISNetMLS Matrix platform just got easier. To create a CMA directly from any search results screen in Matrix, select one or more comparable listings, then click the Cloud CMA button to start creating your CMA report.