



Mandatory MLS Course

matrix.swflaml.com

Dashboard Widgets

The Matrix Dashboard has a number of sections, called widgets. These widgets can be moved around on the page by dragging and dropping the widget to the location you want it on the Dashboard. You can close a widget by clicking on the X button on the top right side of the widget. Closed Widgets are moved to the “**Additional**” widget. The widgets are:

1. **News & Alerts:** This widget will always appear at the top left side of the screen, it displays announcements and tips. New announcements and tips will automatically open when you log in. Clicking “**Read**” will close the announcement, but it will remain available in the News widget. Clicking on “**Read Later**” will cause the announcement to pop up each time you login.
2. **Market Watch:** Gives you a quick glance at recent activity in the MLS across all property classes. You can customize your view to display results from Today only, the past 24 hours, the past 3 days, or the past 7 days.
3. **Hot Sheets:** This widget gives you quick links to listings that have had status and price changes. You can customize the links and can search as far back as 30 days.
4. **External Links:** Contains links to programs that are available to you outside of the MLS; this includes Form Simplicity, MLS Advantage, ShowingTime and more.
5. **Search:** This is a basic address search; it will return all listings that match the entered address.
6. **My Listings:** Displays all of your listings, broken down by status. If you have any listings that will expire in 30 or less days, there will be a RED link to view your expiring listings.
7. **My Favorite Searches:** When you save a search, you can select to mark the search as a favorite, if you have done this, the name of the search will appear here. Clicking on the name will take you to the listings that match your saved criteria.
8. **My Stats:** Links to customized Stats that you created in the Stats Module.
9. **My Carts:** Links to listings that you added to your carts.
10. **Recent Use Contacts:** Lists your top ten contacts that you have been working with.

11. **Recent Portal Visitors:** Lists the names of 10 contacts that have visited their portal, provides the date of the last visit and if the contact has marked any the listings as a favorite, possibility or have left you a message. A portal is the landing page when your customer clicks on a link for a listing from an email. In your customer's portal he or she has access to all emails that you sent to them.
12. **Concierge:** Only visible when you have an auto-email set to concierge mode.
13. **Additional:** Where closed widgets are hidden.

Personalize your Reports, Emails and Portal

When you print reports from Matrix you can include your photo and contact information. When emailing listings to your customers they too can see your photo and contact information. This is done by setting up a header and footer:

1. Click the down arrow next to **"Hello, *Your Name Here*"**>Select **"Settings"**>Click on **"My Information."**
2. Click on the Header & Footer tab.
3. To choose a header template from the Matrix library click on "Select a different banner image/theme." To add your own custom banner click "Upload a custom banner image."
4. When selecting a template from the library, click on your selection and then click the **"Preview"** button at the bottom of the page.
5. In the photo section select "Use Custom Photo" and click on **"Upload Photo"**. Click on "Browse" to locate you photo on your computer, select it, click on Open and click on the **"Save"** button.
6. Under the section "Branding" you can pick up to five lines of information to be displayed on your header.
7. The "Colors" section gives you the option to use the theme default colors associated with the template you chose or to use custom colors of your choosing (click on the ? icon next to the color you'd like to change to find out more information on how to choose a color).
8. Under the Portal Header area is the Print Footer area where you can choose to add a footer. As with the header you can pick the information to be displayed as well as adjust the colors.
9. When you are done updating your header/footer click the **"Save"** button at the bottom of the screen.

The Customer Portal is the landing page when your customer clicks on a link for a listing from an email. In your customer's portal he or she has access to all emails that you have sent to him or her under the tab **"Messages."** The portal will automatically display the customized header that you set up. It also displays a page titled **"My Agent"** that gives your contacts access to more information about you. The information includes a photo, a greeting, a YouTube generated video, and contact information. To customize the **"My Agent"** page take the following steps:

1. While under the My Information section in Matrix click on the **"Portal Profile"** tab.
2. Click on the appropriate section you would like to add/upload your information to.
3. Checkmark the circle to the right of the section you edited for it to display in your customer's portal.

4. When done click the **“Save”** button.

To add/edit your email signature that displays in all emails you send through Matrix take the following steps:

1. In Matrix click the down arrow next to **“Hello, *Your Name Here*”**>Select **“Settings”**>Click on **“My Information.”**
2. Click on the **“Email Signature”** tab.
3. When done adding your signature click the **“Save”** button.

Searching

You can search for listings in each property type, for listings in multiple property types (cross property), offices, agents and open houses. The search screens are very similar and function the same way.

Searching tips:

1. When searching by List Price if you want listings that are \$250,000 and less input 250- if you want listings between \$250,000 and \$350,000 type 250-350. More than 350,000350+.
2. When searching by any fields that you would input a number into, such as living area, year built, etc. You should input either a range or less than or greater than. For instance, searching by living area you can input a range i.e. 2000-3000, or greater than i.e. 2000+ or less than 2000-
3. When selecting any other status except Active 0-120 will automatically fill into the date range. You can input a different date range either by using the 0-90 format or entering in the date range that you want.
4. When selecting Pending w/ Contingent or Pending **remove** the 0-120 date range that appears. If the range is there the results will not include all listings that are currently pending.

Common search questions:

1. How do I add additional fields to my search criteria screen?

To add additional search fields to the search screen click on the **“Add”** link found at the bottom left of the search screen. From the Available Fields box select the field that you want to include on your search screen and click on the **“Add”** button. Click on the **“Back”** button found at the bottom of the screen when you are done.

2. What are the ‘and’, ‘or’ ‘not’ options for?

Most multi pick fields have the option of ‘or’ and ‘not’. If ‘or’ is selected any one or more of the selected features will be included in the resulting listings. If ‘not’ is selected the resulting listings will not have the selected feature(s). When using ‘and’ the resulting listings will have all of the features you selected.

3. What is Current Price?

The current price field is the price of the listing in its current status. For Closed listings this is the sold price. To search by a sold price range you need to enter this price or range into the current price field.

4. Is there a way to search by map?

You can search using a map by clicking on **“Map Search”** on the search screen. On the top right side of the map you can choose to search by a radius, square or polygon, select the option that you want and click on the map to drop the first point. Clicking again will drop the second point.

5. How do I save a search?

After entering the criteria, from the single line report, click on **“Save”** and Click on **“New Saved Search”**. Enter a name in the **“Search Name”** box and click on the **“Save”** button.

Single Line Display/Basic Functions

From the Single Line Report, you can access a number of reports, email listings, print listings, add fields to your Single Line Report, setup auto emails and refine your search.

1. From the Single Line Report how do I return to the Search screen to make changes without losing the criteria I entered?

Clicking on the Criteria tab found at the top right of the screen or clicking on the Criteria button found at the bottom left of the screen will take you back to the search screen with the criteria you entered.

2. Where can I find documents/Supplements that have been uploaded to a listing?

Supplements can be accessed from the Single Line Report by clicking on an icon that looks like three sheets of paper. If a listing has supplements you will see this icon on the Single Line Report directly to the left of the MLS number as well as on various reports such as the Realtor Report. Clicking on the icon will launch a pop up window that contains links to each of the supplements.

3. How do I access the Public Records Report for a listing?

There are multiple ways of accessing the Public Records report; first from the Single Line Report on the far-right side of the screen by clicking on the **“TX”** icon. You can also click on the same **“TX”** icon from various reports such as the Realtor Report or you can click on the **PID#** from any of the reports. When viewing the 360 Property View Report you can click on the Tax tab, which will also generate the report.

4. How do I change the fields that appear on my Single Line Report?

You can add fields on the fly to your Single Line Report. To do this you will need to place your mouse arrow by a column heading name, when your mouse arrow changes to a four pointed arrow, click, and a box will appear in which you will see the option to **“Insert Column.”** Click on this option. From the box that appears select the field that you want added to your Single Line Report and click on the **“Apply”** button. The field will now appear on your Single Line Report.

5. How do I get rid of listings that I don’t want in my results?

You can remove listings that you don’t want to appear on the single line report by checking the listings you want and clicking on the **“Refine”** button and then clicking on **“Narrow.”**

6. Which reports print with a large font?

When on the Print screen the reports found below the **“Reports below print as PDF only”** heading print in a larger font. Select any of these reports by highlighting them and click on the **“Print to PDF”** icon.

7. How do I view the 360 Property Report?

When viewing the single line display click on the MLS#. From there you will have access to the following tabs: Residential REALTOR Report, Tax/Public Records Report, Photos, History, Parcel Maps, Flood Map, and Foreclosure history (if applicable).

Working with Contacts

Matrix is contact centric, to use the full power of the tools in Matrix, it is necessary for you to add your customer(s) as contacts. By having your customer as a contact in Matrix, every email that you send to your contact is available to your customer in a single location called the Portal. Creating a contact is easy, to do this take the following steps.

1. Click on **“My Matrix”** and select **“Contacts.”**
2. Click on the **“Add”** button.
3. In the pop-up, you are required to enter a First Name, Last Name and Email Address. You can select the Salutation that will appear in the emails your customer receives. You can also select whether or not you want Reverse Prospecting Enabled or not*. Once you have entered the required information, click on the **“Save”** button.

*If Reverse Prospecting is enabled, and a listing agent has a listing that appears in the auto email, he or she will know that you have an auto email that has their listing in it. The listing agent does not see any of your customer’s information. This tool is used so that listing agents know that you have a customer that may be interested in his or her listing. The listing agent may choose to email/contact you.

Once you have created a contact and sent emails to your contact, you can view your contact information by clicking on **“My Matrix”** then **“Contacts.”**

Clicking on the name of the contact opens the drop-down menu with the option to view **the “Portal Activity”** which shows when your customer viewed the email(s) you’ve sent. Your customer has the ability to mark listings as Favorites (heart icon), Possibilities (lightbulb icon), and Discards (trash icon) listings. Clicking on the number below these icons will take you to the corresponding listings.

Clicking on the drop-down arrow next to Auto Emails displays the name of the auto email, clicking on the name of the auto email, gives you the ability to change the Settings of the auto email i.e. Frequency and Criteria. Clicking the **“Open in Portal”** button takes you to your customer’s portal where you can view the listings you emailed in the same layout that your customer sees.

Auto Emails

The Auto Email feature provides you with the option to have Matrix automatically email your customer when a new listing matches his or her criteria. To create an auto email, follow these steps:

1. In Matrix hover over the **“Search”** menu and select the property class that you want to search in, i.e. Residential.
2. On the search criteria screen input your criteria for your customer and click on the **“Results”** tab found at the top right side of the screen.
3. You will now be on the Single Line Display with your search results. At the bottom of the screen on the Button Bar click **“Save”** and then **“New Auto Email.”**
4. You will be brought to a screen where you will need to select a contact from the drop-down menu to send the email updates to, you will need to input a subject for the email, you can input a message if you wish.
5. There are two types of Auto emails, the first type is Concierge, this auto email requires your approval before listings are sent to your customer. When you’re logged into Matrix, you will see a notification in the **“bell”** icon if you have any listings that are waiting to be approved to be sent to your customer. The second type automatically sends email updates without waiting for your approval.
6. If you want to approve the listings before they are sent to your customer check the **“Enable Concierge Mode”** box found under the Settings section and skip to step 8. *
7. If you want the listings to go out automatically without any intervention from you, go to the Schedule section and select the frequency you want the emails sent. If you choose ASAP, each time a new listing is added to the MLS that matches your entered criteria your customer will be notified via email. If you select daily your customer will receive a notification each day, there are new listings, or listings that have had status or price changes that meet your criteria.
8. Click on **“Save”** to save your Auto Email.

* When using the Concierge option, if there are listings you need to approve to send to your customer you will see a notification in the **“Bell”** icon at the top left of your Matrix screens.

Inputting a Listing

1. Where can I locate the Profile Sheets?

The Profile Sheets are located on the Home Page of Matrix in the External Links widget.

2. How do I add a new listing in Matrix?

- i. In Matrix on the blue navigation menu click on **“Input”**.
- ii. Click on **“Add New”**.
- iii. Select the Property Type for the new listing i.e. Residential Listing Input.
- iv. Select the County that the property is located in and input information such as the PID or Owner Last Name in order to search for the property and then click on the **“Search”** button.

- v. Click on “Fill” next to the property that you want to list.
 - vi. On the Status tab, you will see two statuses, if you plan on filling out all of the listing details and want to make the listing available in the MLS set the status to Active. If you may not have the time to complete the listing input set the Status to Incomplete, this will allow you to save the listing and finish input at a later time.
 - vii. Click on the General Tab, all fields that are in bold are required, beneath the map click on **“Get Lat/Long from Address.”** NOTE: Matrix does not always set the map pin correctly it is very important to make sure the pin is in the correct location, if it is not, click on **“Set Lat/Long Manually.”** In the window that appears move the pin to the correct location and click **“Done.”**
 - viii. Click through each tab filling out all required fields, when completed click **“Submit Listing.”**
- 3. How can I save a listing that I started to input but do not have time to finish?**
Click on the **“Status”** tab and set the Status to **“Incomplete”** and then click the **“Submit Listing”** button. This saves your listing as an incomplete listing which you can edit and complete at a later time.
- 4. Where can I find an Incomplete listing in order to edit it and finish it?**
Click on **“Input”** from the blue navigation menu found at the top of the screen and from the Quick Modify drop down menu select the listing that you want to complete this will take you to a screen where you will want to click on **“Listing Input.”** You will be brought to the listing input screens where you can finish entering the listing data.
- 5. I clicked Submit Listing and there are red exclamation points on the listing input tabs, what does this mean and what should I do to correct this?**
Each tab that has an exclamation point indicates that you have either missed a required field or entered data incorrectly, it is necessary for you to correct this before the listing can be submitted to the MLS. To fix this click on the tab that has the exclamation point, the field that is causing the problem will also have a red exclamation point next to it. Once you have fixed all of the errors, click on the **“Submit Listing”** button again.
- 6. How do I copy a listing that is Expired or Terminated?**
- i. In Matrix on the blue navigation menu click on **“Input.”**
 - ii. Click on **“Add New.”**
 - iii. Select the Property Type for the Expired or Terminated listing i.e. Residential Listing Input.
 - iv. Click on the **“Fill from Cross Property”** button found at the top of the screen.

- v. Below MLS Number from which to Fill, type in the MLS number type in the MLS number of the listing that you want to copy in the box provided and click on the blue **“Fill From”** button.
- vi. The listing data will be copied to the new listing except for the List Price, Virtual Tour, Compensation, Listing Date, Expiration Date and Property Remarks. Once you have filled out these fields, change the Status from Incomplete to Active and click on the blue **“Submit Listing”** button.

7. Can I upload photos to Incomplete listings?

Photos can be uploaded to both live and incomplete listings. To do this, click on Input from the blue navigation menu found at the top of the screen and from the Quick Modify drop down menu select the listing that you want to upload photos to. Click on **“Manage Photos”**, on the following screen click on **“Browse”** and locate the photos on your computer. You can upload multiple photos at the same time selecting them using your CTRL key and clicking Open. To change the order of the photos, simply drag and drop the photos placing them in the order you want them to appear. Click on the **“Save”** button when you are done.

8. Can I add a description to my photos?

When on the Add/Edit Photos screen, after you have uploaded your photos, you can enter a description for a photo by clicking on the icon found on the top right of the photo box. This pops up a window with the photo, directly below the photo, click on **“Enter Description.”** In the empty box provided, type in the photo description, click on **“Done”** and then click on the **“Save”** button.

9. How do I add documents, such as seller disclosure to my listing?

Click on **“Input”** from the blue navigation menu found at the top of the screen and from the Quick Modify drop down menu select the listing that you want to upload documents to. Click on **“Manage Supplements,”** on the following screen click on **“Browse”** and locate the document on your computer, select the document, click on Open. Input a Supplement Description, select a Supplement Type from the drop-down menu and click the **“Upload”** button. Once you have uploaded your entire documents click on the **“Save”** button.

10. How do I schedule open houses?

Click on **“Input”** from the blue navigation menu found at the top of the screen and from the Quick Modify drop down menu select the listing that you want to schedule the open house for. Click on **“Open Houses”**, on the following screen enter the open house date, from and to time, open house type and remarks then click on the **“Submit Listing”** button.

Important MLS Rules

1. Listings can only be entered into the MLS in one property class at a time. For instance, you cannot list a property for sale under Residential, as well as Lot and Land. The only exception is a property that is for sale as well as for rent, then the system will allow for the property to be listed twice.
2. At least one property specific photo must be uploaded for each listing within 5 business days of the listing being activated in the MLS. Commercial is the only property class exempt from this rule. Please note, a property specific photo cannot be a generic photo of the community but has to be a photo of the actual property.
3. Photos and Property information are the property of the listing broker and may not be used without prior consent from the listing agent and listing broker. It is considered copyright infringement. Even if you are given permission from the previous broker, or if the owners owned the photos and gave you permission, you cannot take the photos directly from the MLS, as there will be a double watermark shown on the photos. If given permission to use the photos, then you must receive them directly from the source.
4. Images uploaded to the MLS may not have any signs, watermarks or branding.
5. Images of properties that are virtually staged or images of a model home, that does not represent the actual property, must be disclosed. This is to be disclosed in the Property Information section and under the description sections of the photos.
6. Virtual Tours and Videos uploaded to the MLS must be strictly "Unbranded" tours and videos. They may not contain any information about the listing agent or listing broker and cannot contain any links to additional sites that may display any information about the listing agent or the listing broker.
7. No access codes, this includes gate codes, are allowed to be displayed anywhere in the MLS.
8. The Property Information section is only used to describe the property, its location, its amenities, the community, and any Seller's incentives for the BUYER. No other information is allowed. This includes open house information, selling agent incentives, names, websites, url's, telephone numbers, and access codes.
9. Driving Directions are to be used for directions only. No other information is allowed. No names, websites, url's, telephone numbers, access codes, or phrases such as "google it" are permitted.
10. Any showing instructions must be listed in the Confidential Remarks.
11. If an agent is listing their own property, or a property they have an ownership interest in, it must be disclosed in the Confidential Remarks.

12. Termination of listing agreements must be mutually agreed upon between the broker and the seller and be in writing. Only Brokers or Office Admins are able to Terminate the listing in MLS. Agents do not have the option.
13. Withdrawn Status can only be used if the broker and seller agree in writing that the listing should not be active but do not want to terminate the listing. This status is primarily used for listings that cannot be shown for a specific amount of time.
14. Any change of status must be entered into the MLS within 3 business days of occurrence. Under no circumstances can a property that has a contract on it be left as Active. Even if the sellers are accepting backup offers, the home must be placed in pending or pending with contingencies status.
15. Target Marketing marked "YES" allows those that are not the listing broker to market the property through Direct Mail and Electronic mail only, to a specific geographical area or to a specific targeted group of consumers. This does not allow for large marketing on sites such as Craigslist, Facebook, or Twitter. Also, the advertisement must use the disclaimer provided on page 50 of the MLS rules and regulations.
16. Variable rate must be marked "YES" if in the listing agreement, the listing broker and/or agent has agreed to a different amount of compensation if they represent both sides of the transaction. Their actual compensation does not need to be listed, just marked as a Variable Rate.
17. Once an offer has been submitted on a listing, compensation cannot be changed in MLS.
18. Supra e-keys are assigned to individual users and under no circumstances are you to share your e-key with anyone. Brokers are not allowed to have an overall "office" e-key. Each participant and subscriber must have their own individual e-key. A violation of this rule is automatically referred to the MLS Committee and is subject to a \$1,000 fine and a 6 month suspension of Supra e-key service. A second offense is a fine of \$1,000 and suspension of service for 3 years.
19. Under no circumstances are you allowed to access a lockbox or property without the listing agent's permission. Regardless of the circumstances, the listing agent must grant permission to access their lockbox and the property. This includes additional showings on the same property on the same day of showing. The listing agent must always approve all access to the lockbox and property. A violation of this rule is automatically referred to the MLS Committee and is subject to a \$1,000 fine and a 6 month suspension of Supra e-key service. A second offense is a fine of \$1,000 and suspension of service for 3 years.
20. It is not permissible to share your username and password with anyone for any reason. If you have a licensed or unlicensed assistant, they can be issued their own login credentials through our Membership Department. Anyone found to violate this will receive an automatic violation with a fine of \$500 and a 30 day suspension of MLS access and services for a first offense. A Second offense is an automatic \$1,000 fine and a 60 Day suspension of MLS Access and Services.

A third violation is automatically referred to the MLS committee with a penalty up to a \$15,000 fine and a 6 month Suspension of MLS Access and Services.

21. Within one (1) business day of marketing a property to the public, the listing broker must submit the listing to the MLS for cooperation with other MLS participants. Public marketing includes, but is not limited to, flyers displayed in windows, yard signs, digital marketing on public facing websites, brokerage website displays (including IDX and VOW), digital communications marketing (email blasts), multi-brokerage listing sharing networks, and applications available to the general public. This Clear Cooperation Policy only applies to the Residential property class.

* A complete list of M.L.S. Rules & Regulations can be found under the MLS tab on NABOR.com and under the Links tab in Matrix.

Reporting Violations

If you believe a listing in the M.L.S. is in violation of our rules please click the link at the bottom of the Realtor Report that says “If you believe there is a violation on this listing, click here to report the problem.” You’ll type in your concern and your message will be sent to the appropriate board of who the listing is associated with. All violations sent are anonymous unless you leave your contact information in the notification message.

Help with Matrix

Help can be found under the Help menu in Matrix. In addition, we are always available for you at the board 239-597-1666 or by email mls@nabor.com.