

Matrix FAQ:

How to change an email, password, or personal information in Matrix:

Go to the Input tab at the top of the screen.

Under the Roster section, click the Edit existing button.

Enter your User ID on the top line and click Modify.

Click Agent Edit.

Make your changes and click Submit Agent.

How to change search criteria?

Go to the My Matrix tab at the top of the screen.

Select Auto Email.

Click the name (Subject) of the Auto Email.

Click Criteria.

Make the changes to the criteria.

Click Save.

Verify the settings are correct.

Click Save.

How do I change Auto Email Settings?

Go to the My Matrix tab at the top of the screen.

Select Auto Email.

Click the name (Subject) of the Auto Email.

Click Settings.

Make the changes to the settings.

Click Save.

What is the difference between a Saved Search and Auto Email?

Saved Searches are general searches you can run and monitor in the system. They do NOT attach to or send notifications to a client.

Auto emails attach to clients and send out new or updated properties to the Client Portal to be viewed by the customer.

How do I disable or turn off an Auto Email for a client?

Go to the My Matrix tab at the top of the screen.

Click Auto Email.

Select the Auto Email by checking the box at the far left of the screen.

Click the Disable button in the bottom left corner of the screen.

What is Reverse Prospect?

This feature facilitates agents getting in touch with each other for their clients' mutual benefit. Listing Agents more easily find other agents with buyers looking for properties like the ones they represent for sellers. Agents representing potential buyers become more aware of available properties matching their buyers' criteria.

- **Agents working with Potential Buyer(s):** To make a saved search available for Reverse Prospecting, click the "Available for Reverse Prospect" checkbox under the Automatic Email settings (*My Matrix>Auto Email*). This will assign a number to the search that will show on your Saved Searches screen. (*It is automatically selected. You must uncheck it to opt-out.*) List Agents with matching properties can now more easily find you.
- **List Agents:** If you have a listing you want to conduct Reverse Prospecting on, go to the "My Listings" screen (*under the My Matrix tab*), select the listing you want to Reverse Prospect, and click the "Reverse Prospect" button. The display will show you a list of agents with saved search criteria that match your listing. If you contact an agent, be sure to give them the numerical code from the display so they can easily find the matching search/customer.

NOTE: Reverse Prospecting is completely anonymous for your buyers. List agents are not given your customer names or contact information.

How do I narrow the Results grid?

As you go through your search results, there may be only certain ones you want to keep. Click the check box next to each listing you want to keep. Click the "Narrow" button. This will remove all listings from your search results that you did not check, so that you can more easily focus on the listings that interest you. In other words, you "narrowed" your search results.

I don't like the "Welcome Email" default email that is being sent out to my clients. Can this be edited or changed?

Yes. When saving an Auto Email, click anywhere in the body of the message. Add or delete the information that you would like to be read by the client when they receive the email.

If you would like to set this as your default message to be sent to ALL clients when initially sending properties, this can be done as well.

Edit the text body of the email. In the bottom right corner of the Welcome Email, click the Gear.

Select Set current message as my default Welcome Email text.

What is Concierge Mode?

Concierge Mode allows the listings to be sent to the agent first before going to the client. Then, the agent can choose which listings get sent to the Client Portal.

Do I still have access to Realist and where is the link?

Yes. With the conversion to Matrix, you still have access to Realist.

Click the **TAX** tab at the top of the screen to launch the Realist program.

You can also click the Realist Tax Report, Realist Map, and Realist Neighborhood Report on an individual listing.