MATRIX QUICK REFERENCE SHEET

STATUS TYPES

STATUS	SHORT CODE	DEFINITION
ACTIVE	A	Active and live in the system; available for showing and auto emails
ACTIVE – CS	ACS	Listings that are sold Conditional, but are marked as Continue to Show
ACTIVE – NS	ANS	Listings that are sold Conditional, but are marked as Do Not Show
PENDING SALE	P	Listings that are Sold Firm but the closing date has not passed
SOLD	S	Listings that are Sold Firm and the closing date has not passed
CANCELLED	C	Listings that have a signed cancellation and are no longer available
EXPIRED	X	Listings that have passed the expiry date
SUSPENDED	SU	Listings that are sold Conditional, but are marked as Continue to Show
INCOMPLETE	I	Incomplete but saved listings (only visible to listing agent)

PROPERTY TYPES

TYPE	DEFINITION
SINGLE-FAMILY	All residential properties freehold or condominium
LAND	All vacant land and not listings
COMMERCIAL	All commercial listings either for the actual building and property or for the business
FARM	All agricultural properties
MULTI-FAMILY	Properties and listings that are a building of units, such as an apartment building or duplex/triplex
CROSS PROPERTY	Not a listing type, but a search type that encompasses all property types in a single search

ADDING A HOT SHEET

1) Click CUSTOMIZE on the Hot Sheet Widget
2) Click ADD on the Manage Hot Sheets screen
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

SETTING UP A CLIENT ON AUTO EMAIL

1) Start a search in the property type for the auto email
2) Set the criteria and click RESULTS
3) At the bottom of the Results page click SAVE
4) Click NEW AUTO EMAIL
5) Set all the settings for the auto email
   – Recipient, Subject, Message, Schedule
6) Click SAVE to send the auto email to the contact

HOW TO SET UP A CLIENT

1) Hover over MY MATRIX and click CONTACTS
2) Click ADD in the lower left corner
3) Fill in the information for the lient
4) Click SAVE to create the contact

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SEARCH CRITERIA TIPS

TYPE	EXAMPLES	USING THE CRITERIA

FREE FORM	Street name, public and sales person remarks	• Searches for exactly what is typed into the box
		• When searching street do not include type or direction, only name
		• Use *s to expand the searh:
		  • * Before a word will search for anything that ends with what is typed
		Example: When searching for streets that start with Saint (St. Peter Street) searching *Peter will find "St. Peter," "St Peter" and "Saint Peter"
		  • * After a word will search for the word and anything after it
		Example: When searching for streets with a plural (Walkers Line) searching for Walker* will find "Walkers," "Walker's" and "Walkers"
		Example: When searching remarks for pond search for *pond*, this will return any listing that has the word pond in it
		Example: When searching remarks for a phrase like "dream home," surround the phrase with *s, if *dream home* is entered, it will find any listing with those two words in that order in the remarks

NUMERIC	Beds, baths, price, lot frontage and depth, total sqft	• Searches for the exact number entered into the box
		• Use symbols to expand the search
		• Use *s to expand the searh:
		  • Put a + after the number to search that number and greater
		  • Put a - after the number to search that number and less
		  • Put a - between two numbers to search between and including those two numbers

DATE	Date ranges beside the status check boxes	• Search the exact date entered
		• Searches the date tied to the status:
		  • Active = List Date
		  • Active CS/Active NS/Expired/Cancelled = Date of last Status Change
		  • Sold Pending = Date reported sold
		  • Sold Closed = Closing date
		• Use the Calendar button beside the field to set dates and ranges
		• Use the same symbols as Numeric type to expand the date ranges
		• Quickly search back to today a number of days by using 0-X
		  Example: To search today and back 30 days, enter 0-30

MULTI SELECT	Region, municipality/ are, style, type	• Select one or more items to match listings by
		• Hold down CTRL on Windows or Command on Mac while clicking to select multiple items
		• Some Multi Select can be used to get different results using the buttons below
		  • Or: This is the default, find listings matching one of the items selected
		  • Not: Exclude listings that have one of the selected items
		  • And: Find listings that have at least all of the items selected
		  • Note: These Options are not available on all of the Multi Select criteria

CHECK LISTS	Basement size/ finish, transaction type	• Search for listings that match one of the checked items

NOTE: When searching criteria that have no information entered or selected are not used to permit the search results
NOTE: When searching, do not use the Back button, use the three tabs located in the top-right to move between the Map, Criteria and Results

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