



MATRIXTM

CONNECTION

Beginner & Advance Matrix Guide

Updated: October 2017

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Matrix Terminology

Status

Regional Status	Short Code	Definition
Active	A	Active and live on the system. Available for showing and auto emails
Active – CS	ACS	Listings 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 moved to the status of Pending Sale (Sold Firm – not yet closed)
Sold	S	Listings that moved to the status of Closed
Cancelled	C	Listings that moved to the status of Cancelled
Expired	X	Listings that moved to the status of Expired
Suspended	SU	Listings that moved to the status of Suspended (Cease Action)
Incomplete	I	Incomplete but saved listings

Property Types

Type	Definition
Single Family	All Residential properties freehold or condominium
Land	All Vacant land and lot 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

Front Page: Information Widgets

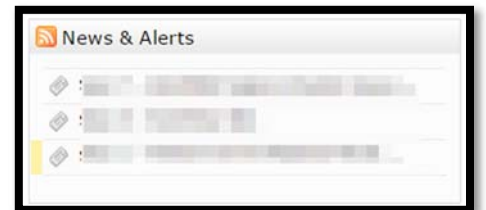
External Links

Links to external websites provided by the Individual Associations for their members as well as ORTIS for all members of the regional system



News and Alerts

Upcoming events and announcements related to the Association. Also includes Agent Alerts about the Member's listings, such as when it is getting close to expiry, reported as sold, or closing



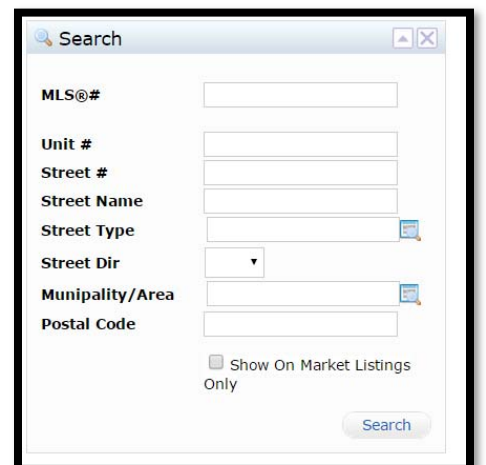
My Listings

Quick links to the sections of my listings. The number in brackets is the number of listings that are in that category. Click on a link to go to those listings.



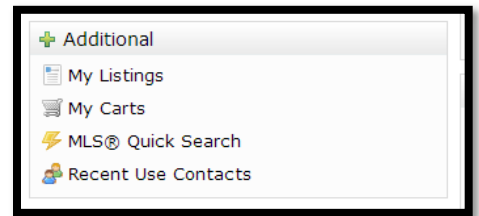
Search

Quickly search for listings in the system using the address of the property or the MLS® number. By default, this will search for all statuses. To limit to active listings, use the "Show on Market Listings Only" check box at the bottom of the widget.



Additional

Used to store unused widgets for later use. Drag and drop widgets on to the additional widget to store them. To use the widget again drag and drop the widget back on to the home page

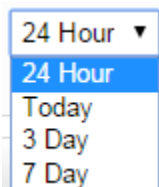


Front Page: Customizable Widgets

Market Watch

The Market Watch widget is a quick glimpse at all changes that are occurring on the Matrix MLS® system. The changes are broken down in to the individual change types. Clicking on the change type will open a list of all of the listings that have undergone that change type. When using the market watch both the range of time it finds changes for as well as the type of property that is displayed can be customized using the drop-down boxes.

Time Period: 24 Hour, 3 day and 7 day will show the changes from that far back in time. Today will show all the changes from the midnight to midnight period of the current day

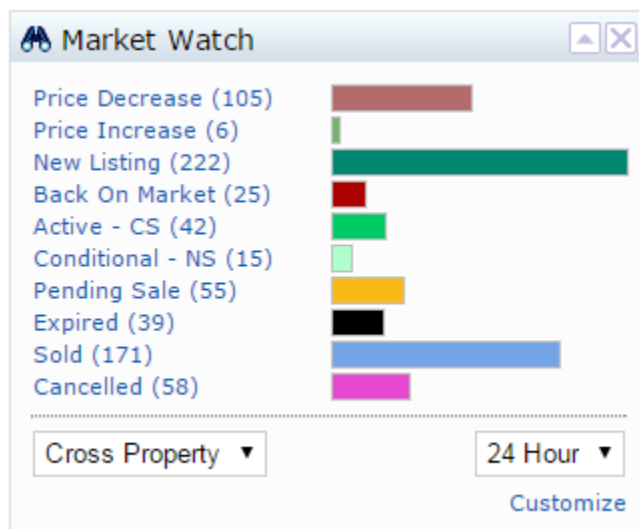


Property Type: This drop-down box can be used to change the type of property that the market watch displays the changes for.

Using the Market Watch: After selecting the time period and property to display click on the change type to see a display of all of the listings of the selected property type that have undergone the selected change within the time period selected.

Customizing the Market Watch: By default, the Market Watch will display any listings that match the property type, change type and time period selected. This can be limited to selected criteria to narrow down what is displayed. To edit the criteria used to narrow the Market watch click the *Customize* link in the bottom right corner of the Market Watch widget. This will open the Market Watch Criteria page. On this page, set the criteria that the Market Watch will use to limit the listings displayed. The criteria can be anything from price ranges to locations to specific types and styles of properties. After the criteria has been set click the Save button in the bottom left corner of the screen to commit the criteria and return to the home page of Matrix. Now when the change types are selected it will display listings that match the change type, property type and criteria specified within the selected time period.

To reset the Market Watch criteria to the default of showing all listings, click on the *Reset* link beside customize. Note: this link will not appear until the criteria has been customized.



Hot Sheets Widget

The Hot Sheets widget is used to create searches in Matrix that look for changes. This is similar to the function of the Market Watch but allows for up to 10 customized searches rather than being limited to the single criteria of the Market Watch. Initially, the Hot Sheets Widget will contain 1 hot sheet for each of the 5 property types and 1 hot sheet for cross property that displays all property types. These initial hot sheets are not limited in any way and show all change types. The Hot Sheets Widget allows for a total of 10 hot sheets to be configured and saved.

Adding a Hot Sheet: To add a new hot sheet to the Hot Sheets Widget click on the customize link in the bottom left corner of the Widget. This will open the Manage Hot Sheets Screen. Click the add button on the right side, this will open the add a hot sheet pop up. Select the type of hot sheet to add (the property type or cross property for all property types) and then give the hot sheet a name so that it can be easily identified. Click the save button to add the hot sheet to the Hot Sheets Widget.

Configuring a Hot Sheet: To set the criteria for a hot sheet select the hot sheet on the Manage Hot Sheets screen and click the *Edit Criteria* button. This will open the Hot Sheet criteria screen. On this page the criteria that will be used to find the listings will be set. Any criteria can be set for the hot sheet from the specific change types, to price ranges, areas, features etc. Once the criteria have been set click the save button in the bottom left corner to save the criteria and return to the manage hot sheets screen.

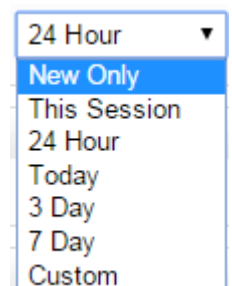
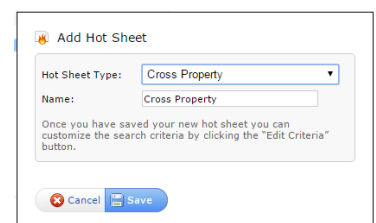
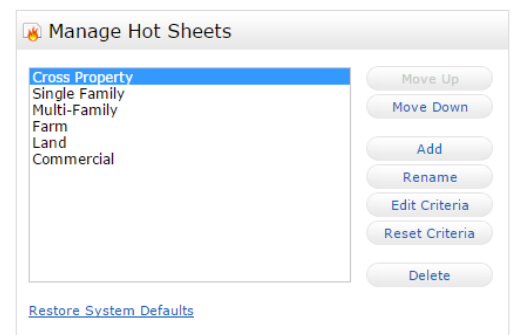
Deleting a Hot Sheet: To delete a hot sheet, on the Manage Hot Sheets screen select the hot sheet to be deleted and click the Delete button.

Running a Hot Sheet: To run a hot sheet select the time period from the drop box, and then click the hot sheet to find listings that match the selected criteria from within the time period selected. When selecting the time period, they are the same as the time periods of the market watch with the following exceptions:

This Session: only listings that have changed while logged on this time

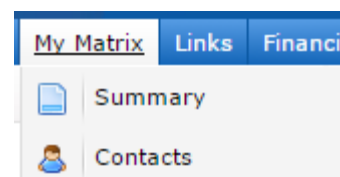
New Only: only listings that have changed since the last time the sheet was run

Custom: When the sheet is clicked on a dialog box will pop up and request a time from which to look from



Contacts

Matrix features a contact manager that can be used to store names and contact information as well to track activity with the contact within the Matrix system. To access the contact manager hover over the My Matrix tab and click on the Contacts menu option.



Creating a Contact: To create a contact, on the contacts screen click the Add button located in the bottom left corner. This will open the Personal Information pop up. Enter the contacts information and click save to add the contact to your contacts list.

Getting the history for a Contact: To get the history of activity of the contact click on the contacts name on the contacts screen. This will open a history for the contact, click on any of the items to see all the details.



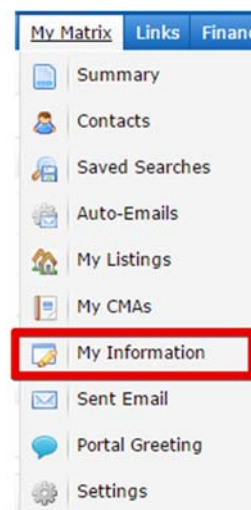
Disabling/Reenabling a contact: A contact can be disabled so it no longer shows up in the auto fill lists for email and auto emails. To do this select the listing and click "Set Inactive". To see your inactive contacts, click the "show X inactive button". To reenble a contact, select it on the inactive list and then click "Set Active". NOTE you can click "Show All X" to see all inactive and Active contacts at the same time



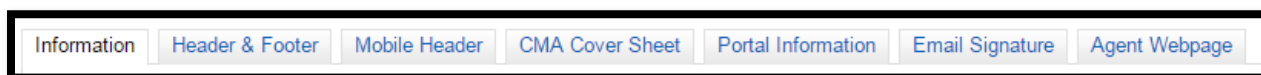
My Information

The My Information section of Matrix is where all the personal information that will be displayed to the public through the portal, header, and email signature is configured. It is located under the My Matrix tab.

Note: Changing information in this section does not change the information that is registered in the Boards Roster. To change roster information such as contact numbers and emails please contact the Membership department






Navigating My Information: When entering in information and modifying settings on the My Information page, DO NOT USE THE BACK BUTTON. Use the tabs located at the top of the screen to navigate around the various sections. If you use the back button, it can create errors and erase the information that has been entered.



Information Tab: The first section of My Information is the Information Tab. On this tab the information that will be used for various other sections of the My Information page. Enter the information to be used in the appropriate box and then click the save button to update the information here and on the other sections of my information.

Header and Footer Tab: On this tab the print and portal headers can be configured. After clicking on the tab for the first time select the header to use from the available options by click on the radio button on the right beside the header or select the option to upload a custom header (for information on how to upload a custom header please contact your friendly board staff)

<input type="radio"/>	Upload Custom Header/Footer Images
<input type="radio"/>	<div><div>Basic Template</div><div><div>John Smith Property Specialist - WeSell Realty Services "Have a Nice Day!"</div></div><div>Office: (555)123-1234 Cell: (123)123-1234 Fax: (123)123-1234 jsmith@noplace.com</div></div>
<input type="radio"/>	<div><div>Basic Info Complete</div><div><div>John Smith Property Specialist - WeSell Realty Services "Have a Nice Day!"</div></div><div><div>Office: (555)123-1234 Cell: (123)123-1234 Fax: (123)123-1234 jsmith@noplace.com</div></div></div>

After selecting a header, click the Preview button at the bottom of the screen to proceed to the customization page and set the selected header as the print and portal header

Once on the preview page the settings for the portal and print header can be adjusted as well as an agent photo uploaded for use on the headers. The information for the header will automatically populate from the Information tab. If any information needs to be adjusted or changed it can be changed on the information tab and it will automatically update on the header.

To upload an agent photo for use with the header change the photo radio button to “Use custom photo” and then click the add photo link. Click browse to open your computer and locate the picture. Then used the cropping tool to frame the picture and click Save to add the photo to your print and porta headers.

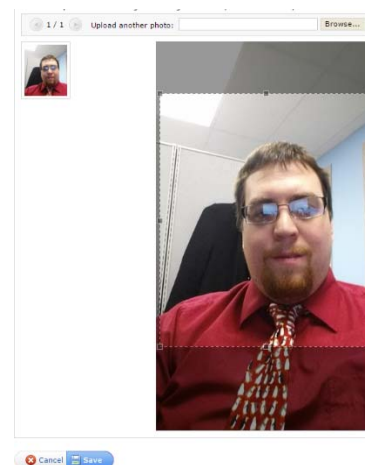
Mobile Header: The portal where listings are viewed by your clients also has a mobile friendly version if they are viewing the listings from a mobile device. To customize the header that is displayed on the mobile header click on the Mobile Header Tab. On this page use the drop-down boxes to customize the information displayed on the mobile header. The drop-down boxes information is populated from the Information tab. To add anything or modify any information in the drop-down boxes, return the Information Tab and update or add any information there and it will carry over to the drop-down boxes. An agent photo can also be added to the mobile header using the same process as for the mobile and print headers outlined above (**NOTE:** once a picture has been uploaded for the Header it can be used on the mobile header as well). Once the mobile header is customized click save to update it for the mobile portal.

Photo: ☐ No Photo ☒ Use Custom Photo [Upload photo](#)

Select the photo to use for your Print Header

You currently have no source photos. Please upload a photo.


Upload a photo: [Browse...](#)




Mark Schell
IT Guy
mark@omdreb.on.ca
Ph: 905-844-6491 x 122
[View More Info](#)

☐ No Photo
☒ Use Custom Photo
[Upload photo](#)

CMA Cover Page: On this tab the default information for the CMA cover page is configured. The default information on this page is taken from the Board Roster. The information can be modified by clicking on the override check box and changing the information in the box. An agent photo can be added using the same procedure outlined in the header and footer section (**NOTE:** a previously uploaded picture can be used). After the information has been customized and the picture added click the save button to update the default CMA cover sheet information

 Upload photo	Name:	Mark Schell	<input type="checkbox"/>
	Company:	OMDREB	<input type="checkbox"/>
	Address Line 1:	125 Navy St	<input type="checkbox"/>
	Address Line 2:		
	City:	Oakville	<input type="checkbox"/>
	State or Province:	ON	<input type="checkbox"/>
	Postal Code:		
	Phone:	905-844-6491 x 122	<input type="checkbox"/>
	Email:	mark@omdreb.on.ca	<input type="checkbox"/>
Save			

Portal Information: The portal information tab is where the information that will be displayed on the welcome page of the portal can be configured. Use the drop-down boxes to customize the information. The option boxes at the bottom can also be used to display your listings, your offices listings or your brokerage's listings on the welcome page of the portal. The left side of the portal information page is a preview of how the information will display on the portal. After customizing the drop-down boxes and options click the save button to update the Portal Information on the welcome page of the portal.


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Helpdesk ▼

www.omdreb.on.ca ▼

IT Guy ▼

Include links to your current listing inventory

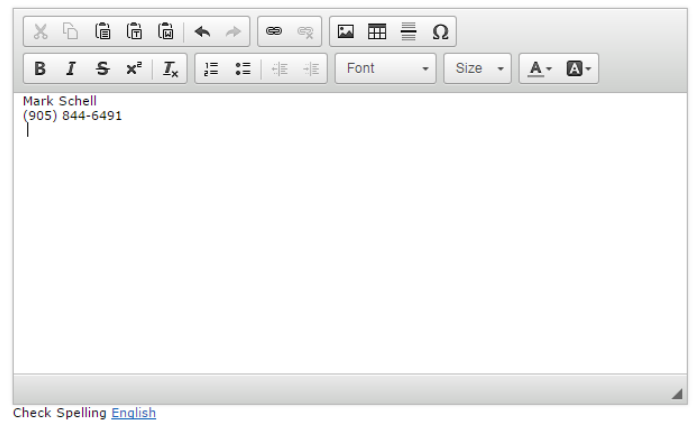
☐ My Active Listings

☐ My Office's Active Listings

☐ My Brokerage's Active Listings

Email Signature

The email signature is configured in the My Information page under the Email Signature tab and will show at the bottom of all emails that are sent from the Matrix system both automatic and direct. Matrix offers a full editor that can be used to add fonts, colours, links and pictures in the email signature (**NOTE:** Pictures cannot be directly added to the signature, they must be added as a link to an external website). To setup the signature, go to the email signature tab and setup the signature in the editor window provided. After it has been configured click the save button and this signature will now show at the bottom of all of the outgoing emails.



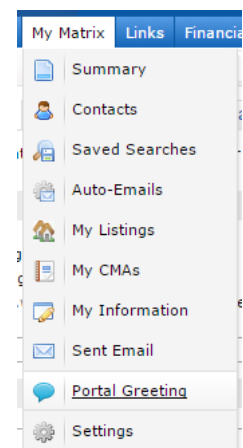
Portal Greeting: The portal greeting is a broadcast message that can be sent to all of your client portals at the same time. It can be configured by going to the My Matrix tab and clicking on Portal Greeting. On the Portal Greeting page enter in the message to be broadcast and click the save button. This will add the message to the Welcome tab of all your client portals. An agent photo can also be added using the same process as the Header and Footer (Note: if a photo was added in the Header and Footer section it will be available for use in the Portal Greeting as well)

My Portal Greeting

This page allows you to edit the greeting message shown on your portal home page.

☒ No Photo
☐ Use Custom Photo
Upload photo

[Check Spelling](#)

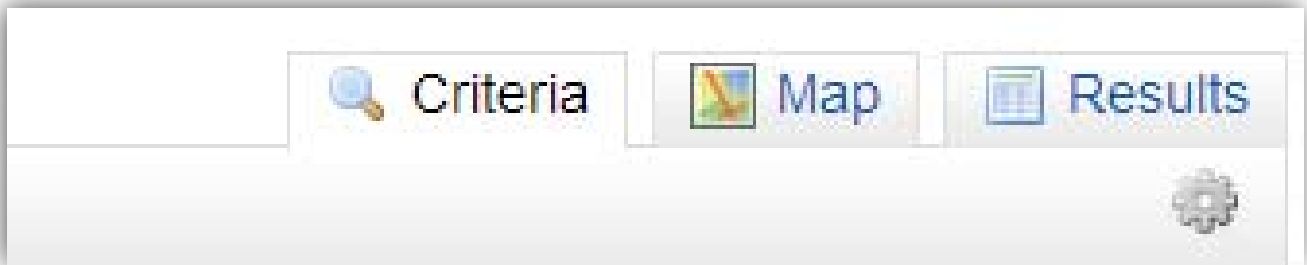


Searching Matrix

In this section the various types of criteria as well as tips, tricks and procedures for searching will be covered. Matrix has 6 main ways of searching for listings, 1 for each property type (Single Family, Multi-Family, Commercial, Land, Farm) and 1 search that covers all of the property types, Cross Property. To start searching hover over the Search tab and select the property type to search for. This will open the search page for that property type and the default criteria available to search by.

Navigating Searches

When searching in Matrix DO NOT USE THE BACK BUTTON. If the back button is used to navigate within the search any set criteria will be lost. Matrix offers 3 tabs located at the top left of the search screen:



These tabs allow navigation between the 3 sections of the search without using the browsers back button.

Example: To navigate from the results to modify the criteria click the criteria tab instead of the back button

Criteria

In this section we will look at the most common used criteria and how to use them, as well as some common rules for groups of criteria. One general rule for all criteria of the search is that if no options are selected in the criteria the criteria is not used as a limiting factor for the results. Leaving criteria blank or unselected/unchecked will cause that criteria to be unused for this search

Check Box Lists: Select the items to limit the search by. The search will find listings that contain at least one of the selected items in the list.

Multi Select Criteria: This type of Criteria is a box that allows you to select multiple items to search for in a category. By default, the search will look for any listings that match at least one of the items selected from the list and matching the rest of the criteria selected.

The image shows two Multi Select Criteria boxes. The first box is labeled 'Region' and contains a list of regions: Brant County, Brantford, Haldimand County, Halton, Hamilton, and Niagara. The second box is labeled 'Municipality/Area' and contains a list of municipalities: 1 - City of Guelph, 1 - Niagara-on-the-Lake, 1 - Oakville, 1 - Waterloo East, 2 - Kitchener East, and 2 - Milton. Both boxes have a 'Or' radio button selected and a 'Not' radio button unselected.

To select multiple items within a box, hold down the CTRL button on a Windows computer or the Command key on a Mac and click on the items to select. To unselect use the same keys.

Multi Select Criteria can also be used to exclude listings based on what is selected instead of including them. Below most of the Multi Select Criteria is a set of radio buttons marked “Or” and “Not”. By default, “Or” will be selected. This means that the search will find listings that match the selected criteria. If “Not” is selected the search will instead exclude listings that match the selected criteria. Some multi select criteria also have a third option of “And”. With the “And” option selected, the search will find listings that have at least the selected items (and possibly more).

The image shows a collection of Multi Select Criteria boxes for various property search criteria. The boxes are arranged in a grid-like fashion. Each box has a title, a list of items, and radio buttons for 'Or', 'Not', and 'And'. The criteria include: Sub Property Type (Condominium, Freehold), Type (Apartment Unit, Attached/Row, Detached, Link, Mobile/Trailer), Style (1 Storey / Apartment Style, 1 1/2 Storey, 2 Storey, 2 1/2 Storey, 3 Storey, Backsplit), Region (Norfolk County, Out of Area, Peel, Toronto, Waterloo, Wellington), Municipality/Area (4 - St. Catharines, 4 - Waterloo West, 5 - Centre Wellington, 5 - Thorold, 5 - Woolwich and Wellesle, 6 - Fonthill/Pelham), Heating (Other, Radiant, Solar, Space Heater(s), Steam Radiators, Water), Garage Type (Attached, Built-In, Carport, Covered, Detached, Inside Entry), Approximate Age (0-5 Years, 6-15 Years, 16-30 Years, 31-50 Years, 51-99 Years, 100+ Years), and Driveway/Parking (Private Double Wide, Private Single Wide, Private Triple Plus Wide, Right-of-Way, RV / Truck Parking, Surface/Open). The 'Or' radio button is selected for all criteria except 'Heating' and 'Driveway/Parking', which have the 'And' radio button selected.

Street Search: The street search in matrix allows listings to be found on 1 or more streets or ranges of numeric addresses.

When using the street search to search by street name, type only the name of the street and not the type into the St Name field. This field will search for EXACTLY what is entered in the box. Matrix allows for the use of wildcards to expand the search beyond what has been typed into the field. In Matrix the wildcard is the * (shift+8 on the keyboard) and it can be used in the following ways:

- *[input]: this would search for anything before what was input ending with what was inputted
 - Example: *Peter would result in Peter, St. Peter, Saint Peter, St Peter, etc.
- [input]*: this would search for anything after what is inputted starting with what was inputted
 - Example: Lake* would result in Lake, Lakeshore, Lake View, Lake Side, etc.
 - Example: walker* would result in walkers walker's walkers' and walker
- *[input]*: this would search for any street name that contained the input typed in

The street search allows for more than one street or numeric range to be searched at the same time. Click the more button below the street search line and this will add a second street search line for use.


Streets can also be excluded from the search by using the ! before the street name. Example: !lakeshore would exclude any listing that matches the criteria but is on lakeshore

Date and Status: Date and status is searched in one combined criteria. Check mark the statuses to search for and use the adjacent box to set the date range from which to find listings. The Dates/ranges entered beside the statuses will search the date tied to that status (example Active searches the list date, Sold Pending searches the sale date, and sold closed searches the closing date). When entering in the ranges they can either be entered in manually, using the calendar or using numbers. To enter manually enter the dates in the MM/DD/YYYY format with a – in between (01/01/2015-02/01/2015) to search from a day forward use a + (01/01/2015+) and to search for a day and back use a – after the date (01/01/2015-). To use the calendar, click the button to the right of the date box. This will bring up the calendar box, select the 2 dates to use for the range and click OK. The final way to search is using numbers, in this case 0 represents today and can be combined with a –X to look for listings today and that many days back (for example 0-30 would look for listings today and 30 days in to the past).

Price: when searching price in matrix by default it searches by 1,000's (for example 500 = 500,000), it also searches for exactly the number entered in the box. When searching price there are 2 symbols that can be used to change the way the price is searched. Adding a + sign after the number will search for that price and greater. Adding a – after a number will look for that price and less. Adding a – between two numbers will look for prices between those two numbers.

Examples:

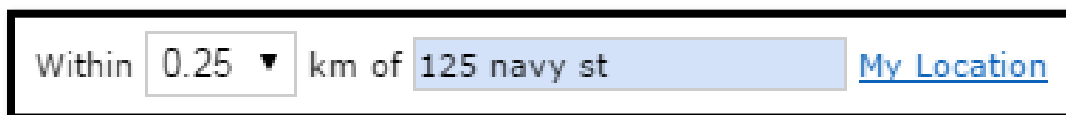
- 500+: prices equal to or greater than 500,000
- 500-: prices less than or equal to 500,000
- 500-800: prices between and including 500,000 and 800,000



Price ☒ (000s)

When searching prices, it can be changed to instead look for the prices typed in the box by unchecking the box to the right of the price box with the 3 0's. When searching price, it will find listings with a price matching the criteria selected according to the status searched. When searching an active listing it will look for list price, when searching a sold listing it will look for the sale price.

Location Search: The location search finds all listings that match the other selected criteria within a radius around the entered address.



Within 0.25 ▼ km of 125 navy st [My Location](#)

Room Search: The room search is used to find listings with specific rooms and rooms of specified sizes. Select the room type, level and enter in sizes to search listings for specific needs. Room sizes can be searched by feet or inches, use a “-” between numbers to search for ranges of sizes or a + after a number to search for that size or greater. Search for multiple rooms by clicking the More button.



Rooms Search

Type	Level	Lg Ft	Wd Ft	Lg Mtr	Wd Mtr
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[More](#)

Bedrooms: Bedrooms can be searched in 2 ways by default, by either the total bedrooms or by the bedrooms above ground. When searching with the Bedrooms field it will search for any combination of above and below grade bedrooms that match the number entered.

When searching bedrooms if a number is entered it looks for that exact number. Adding a + to the end of the number with not space will look for that number of bedrooms or more adding a – after the number will find that number of bedrooms and less, and adding a – between 2 numbers will search for a range of bedrooms. **Examples:** 3+: 3 or more, 3-: 3 or less, 3-4: 3 or 4 bedrooms

Bathrooms: Bathrooms are searched in the same way as explained in bedrooms except there are 3 ways of searching bathrooms by default. Total baths, Full baths (3 piece or more), and half baths (2 piece). The same symbols can be used for bathrooms as can be used for bedrooms.

Adding Additional Criteria: Criteria that are not included in the default search criteria can be added to the search screen. To add criteria, scroll down to the bottom of the search page and click the add or add/remove link adjacent to the Additional Fields heading. On the Frequently Used Fields screen select the criteria to add in the available fields list and then click the add button in the middle of the 2 boxes. This will add the criteria to the selected fields list. To return to the search screen click the back button located in the lower left corner of the screen below the available fields list. The added criteria will be located below the additional fields heading. The selected criteria will remain on the search page until removed on the selected fields list.

Bedrooms
?

Bedrooms Above Grade
?

Total Baths
?

Full Baths
?

Half Baths
?

Frequently Used Fields

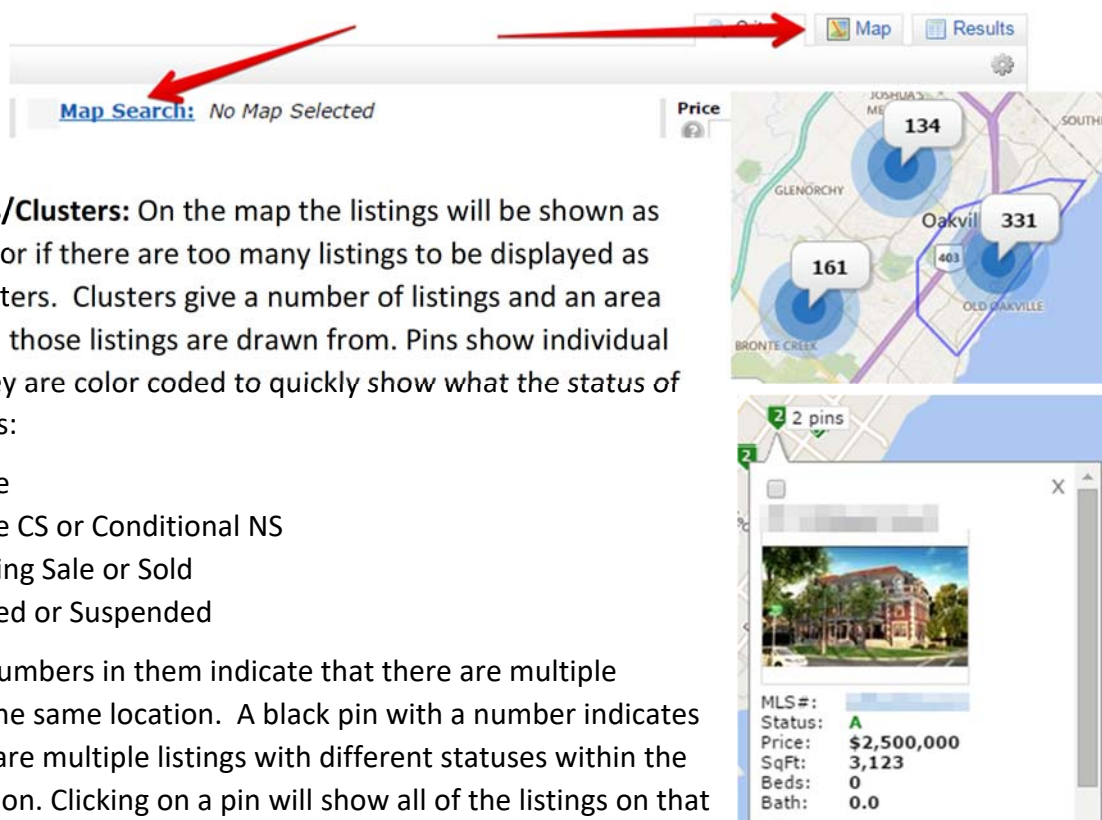
These are the frequently used search fields; you can add them to your search page to create customized searches.

Available Fields		Selected Fields
<div>Acres Range Acres Total Active Open House Count Additional Fee Additional Images URL Additional Monthly Fees Air Conditioning Air Conditioning Type Alternate Feature Sheet URL Alternate Latitude Alternate Longitude Alternate MLS Number</div> <div>Search: <input type="text"/></div>	<div>Add -></div> <div>Remove <-</div>	<div></div> <div>Move Up</div> <div>Move Down</div>

[Back](#)

Searching with the Map:

Matrix allows listings to be searched by geographic locations instead of using the defined regions, municipalities and neighborhoods. The search can be performed by drawing shapes on the map and then combined with criteria to find listings. To access the map for searching click on the Map Search link or the Map tab.



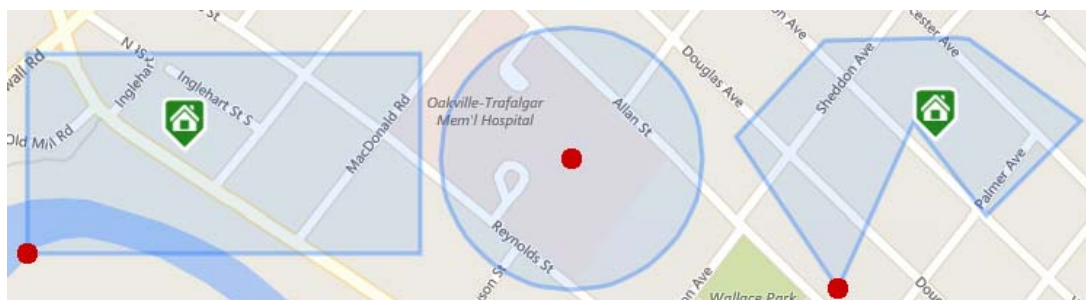
Listing Pins/Clusters: On the map the listings will be shown as either pins or if there are too many listings to be displayed as pins as clusters. Clusters give a number of listings and an area from which those listings are drawn from. Pins show individual listings, they are color coded to quickly show what the status of the listing is:

- Active
- Active CS or Conditional NS
- Pending Sale or Sold
- Expired or Suspended

Pins with numbers in them indicate that there are multiple listings in the same location. A black pin with a number indicates that there are multiple listings with different statuses within the same location. Clicking on a pin will show all of the listings on that pin in a short format.

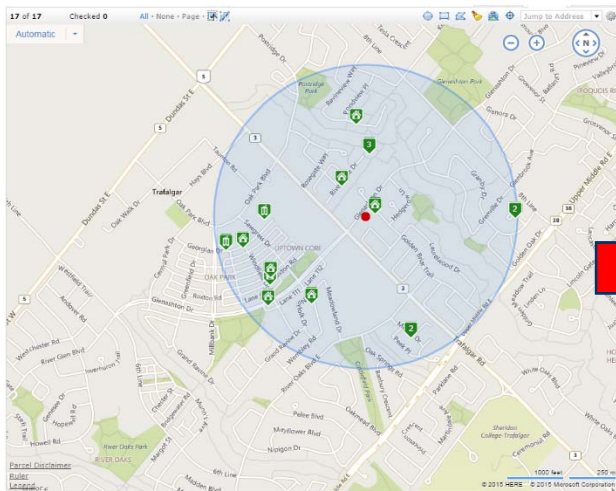
Using the Shapes: The map search has 3 different shapes that

can be used to search for listings on the map search, Radius, Rectangle and Polygon. To draw a Rectangle or polygon click on the button for that shape, click on the map to place the corner or center of the shape, pull away from the point to expand the shape and then click again to set the shape on the map. For the polygon, click on the polygon button, click on the map to place the first corner, click additional times to place corners of the shape and then click on the red dot placed with the initial click to set the shape on the map.

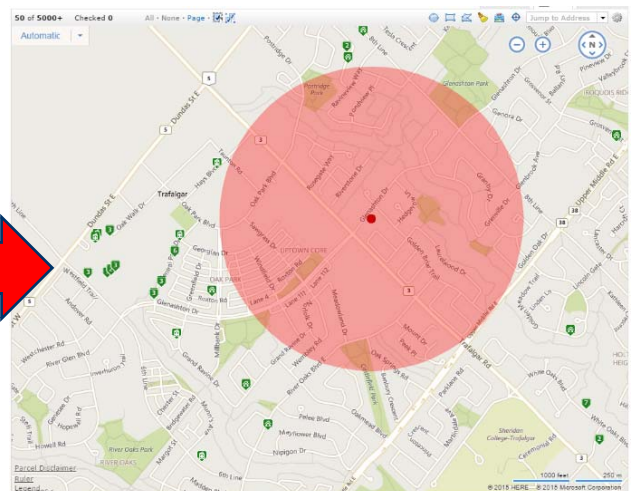


Shape Options: By default, when drawing shapes on the map they are used to include areas for the search and are blue in colour. Shapes can also be used to exclude an area instead of including an area. After drawing a shape click on the red dot for the shape and click Exclude This Shape, this will turn the shape red and instead of finding listings in the shape it will exclude listings that are within the shape. Shapes can also be drawn within other shapes to include an area but exclude an area within the selected area

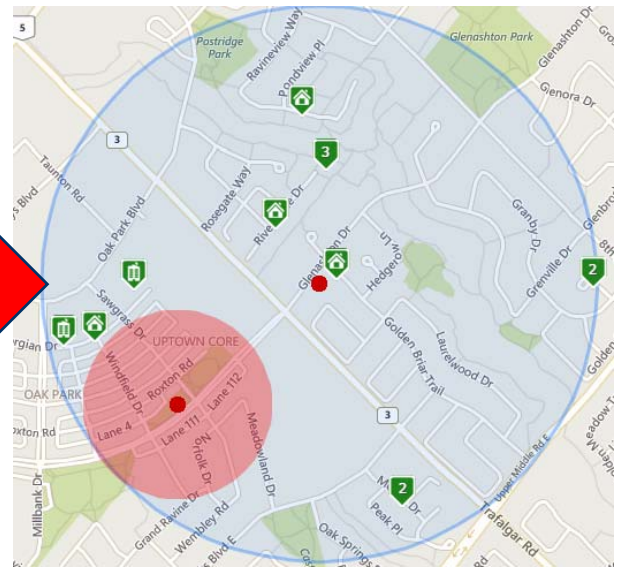
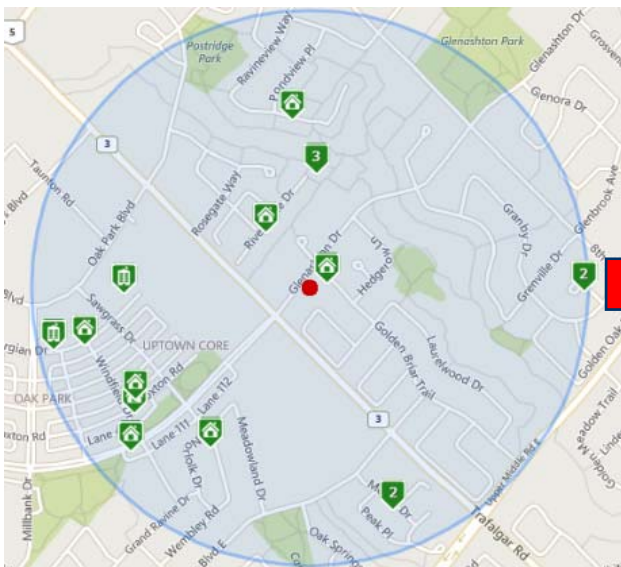
Example:



Blue area is Included in the search



Red Area is Not included in the search













Results and Displays

Matrix offers several different ways of viewing listings as well as options while viewing listing. In this section they will be discussed. To use the different displays, click on the Display drop-down box and select the display to be used

Display Single Line ▼

Icons: Across the various displays of Matrix there are several icons that can be clicked to access different information about the listing:

-  Map: Open an additional window with a map and the property marked in the center
-  Pictures: Open a scrollable picture gallery
-  Property History: Open an additional window showing the history of the times that this address has been listed
-  Virtual Tour: Open the virtual tour for the listing in an additional tab
-  Brochure: Open the brochure for the listing in an additional tab
-  Supplements: Open a list of all documents attached to the listing in an additional tab
-  Open house: Open a list of all upcoming open houses for this property in an additional tab
-  Showing Time: Online booking of showings for the property
-  Price Change Indicators: Not clickable, indicates if there has been a price increase or decrease on the listing
-  Report Data Error: Click to fill out a form if there are any issues with the listing

The MLS® Number can also be clicked as a shortcut to the Broker Full version of the listing.

Display Types: Thumbnail: The Thumbnail display shows a quick look at the listing including most information in short form, one picture and the Public remarks



Hot Sheet: Shows a quick snapshot of information with the last change and the change date.

Previous · Next · 1 of 1	Checked 0	All · None · Page	Single Line display	Display HotSheet ▼	at 25 ▼	per page	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chg Date	Change Info	MLS® #	Address	Price City	Sub Type	Style	Beds Baths
11/06/15	New			\$445,900 Millgrove	FRH	Sidesplit	3 1.0

Client Thumbnail/Portal: Shows all of the publicly available information, 1 picture and the listing brokerage as well as the last change on the listing. If the listing has undergone a change recently there is also a banner placed on the picture for the change. This is one of the displays available to clients on the Portal.

☐




102 BRONTE #311, Oakville, ON L6L 6J5
 MLS #: Price: **\$499,900**
 Style: **1 Storey / Apartment Style** Sqft:
 Type: **Apartment Unit** BR/BA: **2/2.0**
 Acres: # Gar: **LEVEL A UNITS 8, 9**
 Heat: **Electric/Forced Air** Age: **16-30 Years**
 Water: **Municipal/** Status: **Active**
 Pool Type: **Indoor** Region: **Halton**
 Brokerage:
Price Reduced

Client Full: Shows all of the publicly available information about the listing as well as a scrollable picture gallery for the listing. This is one of the displays available on the client portal

Previous · Next · 1 of 28
 Checked 0 All · None · Page Single Line display
 Display Client Full at 1 per page

☐ **1905 PILGRIMS WY #502**
 Oakville, ON L6M 2X2

Single Family/Condominium/Sale Price: **\$499,900**
 MLS #: Prev Price:
 Alt. MLS #: Status: **Active**
 Region: **Halton** DOM: **37**
 Municipality: **1 - Oakville**
 Neighbourhood: **1007 - GA Glen Abbey**
 Type: **Apartment Unit**
 Style: **1 Storey / Apartment Style** Sq.Ft: **1,449 / Floor plan(s)**
 Ownership: **Condominium**
 Baseament: **No** # Beds: **2**
 Age/Yr Built: **31-50 Years** # Baths: **2.0**
 Brokerage:
 Directions: **W. of Dorval, S. of Upper Middle - Nottingham Gate**



1 / 30

Property Details
 Yr Roof Repl: Heat Source: **Electric**
 Roof: Heat System: **Forced Air** Air Condition:
 Exterior: **Brick** Sewer: **Sewer** Air Cond Type:
 Foundation: Water: **Municipal** Pool: **Indoor**
 Bsmt Size/Fn/Dev: **None** Water Supply: Fireplaces: **0**
 Construction: Water Meter: Amps:
 #/Type of Garage: **124, Attached, Inside Entry, Underground** Well Testing: Water Exp:
 Driveway: Depth/Cpcty: UFFI:
 Parking: **Asphalt** Waterfront: Adl Mnth Fees:
 Handicap Equip:

Client Single Line: Shows a quick snapshot of information about the listing and the last change type of the listing. This is one of the displays available on the portal

Previous · Next · 1-25 of 28	Checked 0	All · None · Page	Single Line display	Display Client Single Line	at 25	per page
<input type="checkbox"/>	<input type="checkbox"/>	Date Upd	Chg Type	MLS #	S Address	Price BR BA Sq Ft Acres
<input type="checkbox"/>	<input type="checkbox"/>	Never	New Listing		A 1905 PILGRIMS Way Unit#502	\$499,900 2 2.0 1001 to
<input type="checkbox"/>	<input type="checkbox"/>	Never	Price Decrease		A 102 BRONTE Road Unit#311	\$499,900 2 2.0 1001 to < 0.5
<input type="checkbox"/>	<input type="checkbox"/>	Never	New Listing		A 174 Glenashton Drive	\$499,900 3 4.0 < 0.5
<input type="checkbox"/>	<input type="checkbox"/>	Never	New Listing		A 11 Bronte Road Unit#522	\$499,900 1 1.0 < 0.5
<input type="checkbox"/>	<input type="checkbox"/>	Never	New Listing		A 2470 Prince Michael Drive Unit#204	\$499,900 2 2.0 1001 to < 0.5
<input type="checkbox"/>	<input type="checkbox"/>	Never	New Listing		A 2185 Marine Drive Unit#308	\$499,000 2 2.0 1501 to
<input type="checkbox"/>	<input type="checkbox"/>	Never	New Listing		A 1120 Queens Avenue Unit#20	\$498,000 3 3.0 1501 to < 0.5


Full: The Full display shows all of the information about the listing both public and agent. The information is divided in to separate tabs.

Listing Tab: This tab contains all of the information about the property except for the room information. There is also a section for the open houses for this property. One note about this tab, when preparing an offer all necessary information is located in the top section of this display.

Previous · Next · 1 of 28 Checked 0 All · None · Page Single Line display Display Full at 1 per page

Listing Rooms Listing History Photos

1905 PILGRIMS WY #502
Oakville, ON L6M 2X2



1 / 30

Single Family/Condominium/Sale Price: **\$499,900**

MLS® #: [REDACTED] Prev Price: [REDACTED]
 Alt. MLS® #: [REDACTED] Status: **Active**
 Region: **Halton** DOM: **37**
 Municipality: **1 - Oakville** Basement: **No**
 Neighbourhood: **1007 - GA Glen Abbey**
 Type/Style: **Apartment Unit/1 Storey / Apartment Style**
 Age/Yr Built: **31-50 Years** Sq.Ft: **1,449/Floor plan(s)**
 Legal Desc: [REDACTED]
 Ownership: **Condominium** # Beds: **2**
 Acres/Range: [REDACTED] # Baths: **2.0**
 Taxes/Year: **\$3,491/2015** Lot Front: [REDACTED]
 Irregularities: [REDACTED] Lot Depth: [REDACTED]
 Lot Shape: [REDACTED]

Heat: **Electric/Forced Air**
 Water: **Municipal/** Sewer: **Sewer**
 Sellers: [REDACTED]
 List SP/Brk: [REDACTED]

Directions: **W. of Dorval, S. of Upper Middle - Nottingham Gate**

Property Details

Roof: [REDACTED]	Yr Roof Repl: [REDACTED]	Air Condition: [REDACTED]
Exterior: Brick	Pool: Indoor	Air Cond Type: [REDACTED]
Foundation: [REDACTED]	Ener Cert Lvl: [REDACTED]	Laundry Access: In-Suite
Fireplaces: 0	Water Meter: [REDACTED]	Amps: [REDACTED]
Bsmt Size/Fn/Dev: None	Well Testing: [REDACTED]	UFFI: [REDACTED]
#/Type of Garage: 124, Attached, Inside Entry, Underground	Depth/Cpcty: [REDACTED]	Adl Mnth Fees: [REDACTED]
Driveway Parking/Turn: Asphalt	Waterfront: [REDACTED]	Vicinitas: [REDACTED]

Rooms Tab: This tab has a list of all rooms and the dimensions and feature codes

Listing Rooms Listing History Photos

MLS®#:	Room	Level	Dimensions Imperial	Dimensions Metric	Features
[REDACTED]	Living Room	Second	15' 0" X 12' 11"	4.57 X 3.94	
	Dining Room	Second	12' 0" X 11' 0"	3.66 X 3.35	
	Kitchen	Second	13' 0" X 10' 0"	3.96 X 3.05	
	Dinette	Second	11' 0" X 11' 0"	3.35 X 3.35	
	Foyer	Second	12' 2" X 6' 0"	3.71 X 1.83	
	Master Bedroom	Third	14' 0" X 13' 0"	4.27 X 3.96	4-Piece
	Bedroom	Third	16' 7" X 10' 0"	5.05 X 3.05	
	Bedroom	Third	15' 7" X 10' 0"	4.75 X 3.05	
	Ensuite	Third	16' 0" X 16' 0"	4.88 X 4.88	4-Piece
	Bathroom	Third	2' 0" X	0.61 X	3-Piece
	Office	Main	16' 0" X 16' 0"	4.88 X 4.88	
	Bathroom	Main			3-Piece
	Family Room	Main	20' 0" X 12' 0"	6.1 X 3.66	
	Recreation Room	Basement	19' 0" X 14' 0"	5.79 X 4.27	
	Workshop	Basement	9' 0" X 8' 0"	2.74 X 2.44	
	Laundry Room	Basement			

Listing History Tab: This tab contains all status and price changes for this listing

Listing

Rooms

Listing History


Photos

MLS®#	Type	Change Info	Effective Dt	Curr Price	Mod By	List SP ID	List Brk ID	Change
	SF	->A	10/03/2015					New Lis
	SF	->499900	10/03/2015					


Photos Tab: This tab contains a gallery of all photos for the listing as well as any comments entered about the photos.

Listing
Rooms
Listing History
Photos


MLS®#:




Exterior Front. The exterior of the home features natural field stone, copper eaves trough and downspouts, stately pathways and stonework, a cedar shake roof, wrought iron railings, and manicured gardens.



Exterior Front.





Single Line Display: The Single Line display shows a snapshot of information about the listing. Each listing is shown in 1 row of the display. This display is fully customizable and can have multiple versions saved to create customized displays and printouts.

MLS #	St	PST	Address	Price	Municipality (Area)	Neighbourhood	City	SqFt	Beds	Baths	DOM	List Date
1905 PILGRIMS Way Unit# 502	A	CND	1905 PILGRIMS Way Unit# 502	\$499,900	1 - Oakville	1007 - GA Glen Abbey	Oakville	1,449	2	2.0	37	10/03/2015
102 BRONTE Road Unit# 311	A	CND	102 BRONTE Road Unit# 311	\$499,900	1 - Oakville	1001 - BR Bronte	Oakville	2	2.0	2.0	27	10/13/2015
174 Glenashton Drive	A	FRH	174 Glenashton Drive	\$499,900	1 - Oakville	1015 - RO River Oaks	Oakville	3	4.0	4.0	27	10/13/2015
11 Bronte Road Unit# 522	A	CND	11 Bronte Road Unit# 522	\$499,900	1 - Oakville	1001 - BR Bronte	Oakville	1	1.0	1.0	25	10/15/2015
2470 Prince Michael Drive Unit# 20-	A	CND	2470 Prince Michael Drive Unit# 20-	\$499,900	1 - Oakville	1009 - JC Joshua Creek	Oakville	2	2.0	2.0	3	11/06/2015

To move columns, hover over the heading of the column until the cursor becomes a 4 pointed arrow. Then click, hold and drag the column to the desired location. To add a column, hover over a column heading until the cursor becomes a 4 pointed arrow then left click, this will bring up a menu. Click the insert column link and then select the field to add from the list. Click apply to add the column. To remove a column, click on the heading of the column when the cursor is a 4 pointed arrow and click the remove column link.

Address Price

Pixel Width: 200 [Auto-fit](#)

[Remove Column](#) [Insert Column](#)

Alignment: ☒ Left ☐ Right ☐ Center

☐ Wrap Line

[Cancel](#) [Apply](#)

Saving Displays: To save the customized display, click on the Manage Displays icon () and click the Save as a copy link. To rename the custom display, while it is selected click on the manage displays icon, change the name in the display name box and click save changes.

Display Name: Single Line

[Save As a Copy](#) [Revert unsaved changes](#)

To restore the Single Line display back to its default layout, select Single Line from the display drop-down box, click the manage displays button and then click the Revert unsaved changes link.

Changing Default Display: To change the display that is first used when viewing the results of a search, select the display to be used from the display drop-down box. Click the Gear icon in the top right corner of the results and click the Set current display, sort order and count per page as my Search starting default link.

Previous · Next · 1-25 of 28 Checked 0 All · None · Page Display Single Line at 25 per page

MLS # St PST Address Price Municipality (Area)

1905 PILGRIMS Way Unit# 502 \$499,900 1 - Oakville

[Set current display, sort order and count per page as my Search starting default](#)
[Reset to the system Search defaults](#)

To reset it back to the default click the Reset to the system search defaults link.

Accessing Open House Searches

To Access the open house search, click on the search tab, scroll to the bottom and click on the open house link. This will allow you to use the open house focused search and only find properties with active open houses

Printing and Emailing

To print out or email listings from the results screen, select the listings to be printed by using the check boxes located at the left side of the listing on the single line display or in the upper left corner of most other displays.

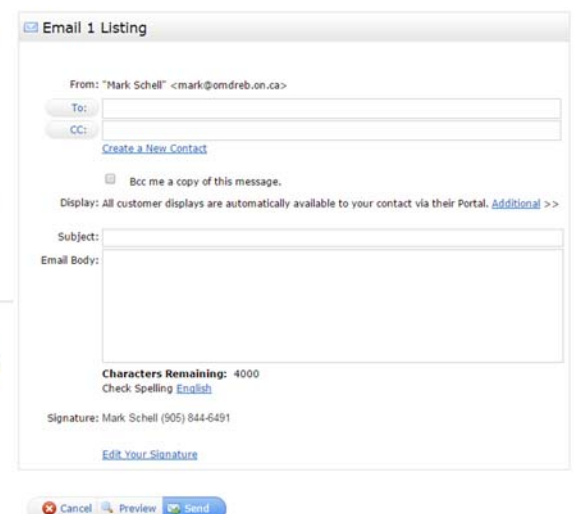
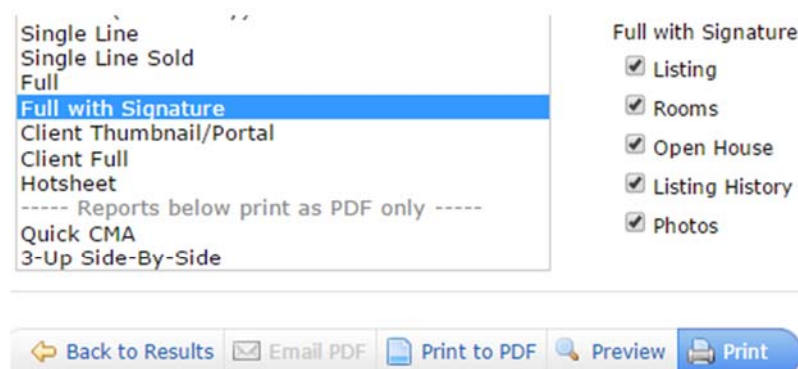


After selecting the listings to be sent or printed click either the Email button or print button at the bottom of the results page.

When Emailing fill out the email form with the recipients, subject line, and message and click send to deliver the email. The recipients will receive a link to where the listings can be viewed in a client portal.



When printing select the report to be used for printing and click the print button to bring up your browsers print dialog. To preview what the print out will look like before sending it to the printer the Print to PDF button can be used. This will generate a PDF version of the report and open it in an additional tab. There are also several options for headers and what will be included in the print report on the right-hand side of the right-hand side of the print page. If the report is a client friendly report it can be emailed from here as a PDF attachment using the Email PDF button, click the button and fill out the email form, click send to email the selected listings as attachments.



Auto Email

Auto emails are an automated way of finding and sending listings to clients based on criteria that is setup for them. The criteria can be any criteria that can be used to narrow down searches and Auto Emails can be configured for any property type. In this section we will be going through the processes involved in setting up and managing Auto Emails.

Setting up the Auto Email

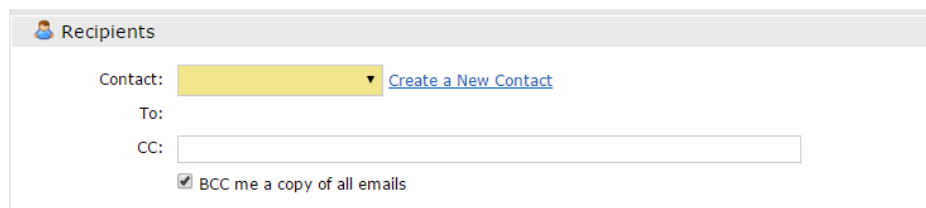
Step One: Set the Criteria: The first step in setting up an Auto Email is to define the criteria for the auto email. To do this start a search for the property type to be used in the auto email. Set the criteria to be used (price, area, features, etc.) and then click the results button.

Step Two: Configure the Auto Email: To configure the auto email on the results screen for the search with the criteria for the client click the Save button at the bottom of the screen and then click the New Auto Email button.

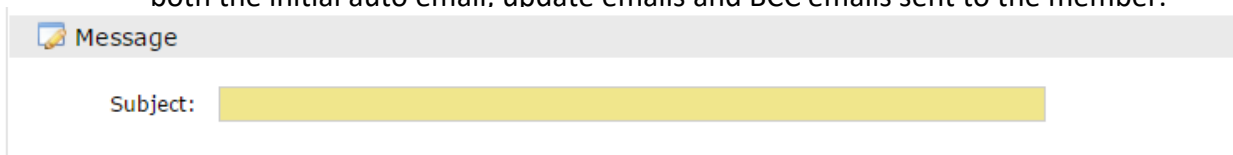


Step 3: Auto Email Settings: Clicking the New Auto email button will open the Save a New Auto Email page. On this page all of the settings for the auto email will be defined (Recipient, messages and subject line, settings and schedule).

- **Recipients:** In this section who the email will be sent to is set up. The contact for the auto email is selected using the drop-down box. The contact does need to be set up in the Matrix My Contacts. If they are not the Create a New Contact link can be used to set them up. CCs can be used to add additional recipients to the Auto email. The BCC Checkbox can be used to enable an update to the Member every time the auto email sends out an update.



- **Message:** In this section the Subject line and messages will be set up. The subject line will be used for every email sent for this Auto Email, this includes both the initial auto email, update emails and BCC emails sent to the member.



- **Message Continued:** There are 2 messages that are setup for an Auto Email, the Welcome and the Recurring Emails. The welcome email will be sent as the first email sent for this auto email and the recurring email will be sent every time there is an update. To set the messages click on the tab for the message and enter the message into the provided box

Salutation:

Message: Welcome to "The Portal"!

All messages I send to you containing listing information, whether they have been sent manually or through an automated search that I have created for you, will contain a link to your personalized page on The Portal.

You can access The Portal with your favorite web browser, where you'll be able to view the listing information, photographs, maps, and more. For your convenience, you'll be able to sort these listings, rate them and categorize

Check Spelling [English](#)

- **Criteria:** This section cannot be changed, it displays the criteria being used for this auto email.

Criteria:

Property Type is 'Single Family'
 Status is one of 'Active', 'Active - CS'
 Transaction Type is 'Sale'
 Matrix Testing is no
 Region is 'Halton'
 Municipality (Area) is 'Oakville'
 Neighbourhood is 'BC Bronte Creek'

- **Settings:** In this section the various options can be set for the auto email. Concierge mode, a replacement for scheduled auto emails discussed further in this section. Reverse prospecting, discussed in the My Matrix section of the manual and Enable as a Faourite search, discussed in the Advanced Manual under Saved Searches

Settings

Concierge: ☐ Enable concierge mode

☐ Show this contact in Reverse Prospecting results

☐ Enable as a Favorite Search on Home tab (10 maximum)

- **Schedlue:** In this final section the frequency of updates is set. ASAP will send an update as soon as there is a status change or new listing that matches the criteria. Daily sends a once or twice update bassed on the check boxes selected and monthly sends an update on the first of every mont.

Schedule

☐ ASAP: Emails are sent as soon as possible.

☒ Daily: Emails are sent on the days you choose.

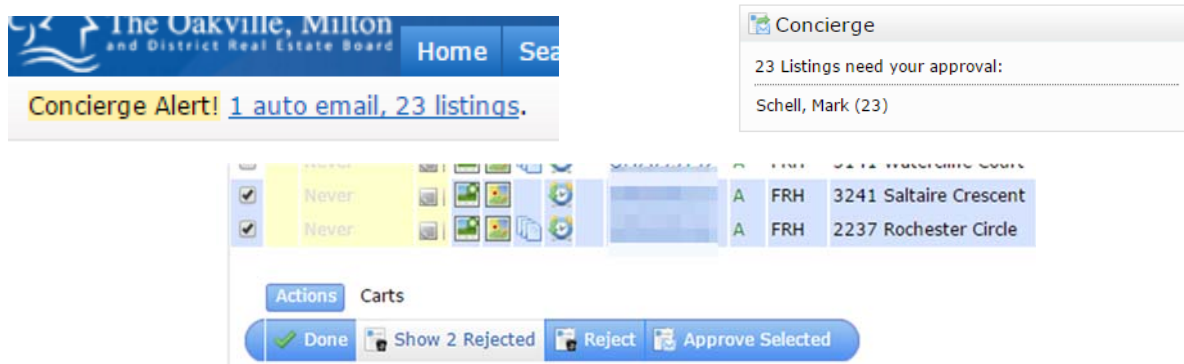
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

[Clear](#)

☐ Monthly: Emails are sent on the first of the month at midnight.




Step Four: Finalizing the Auto Email: After all the settings have been configured click the save button at the bottom of the Save a New Auto Email Page. This will complete the auto email setup and send the Welcome email to the recipients. In the welcome email there is an activation link. This link needs to be clicked or the recipients will not receive any further emails.

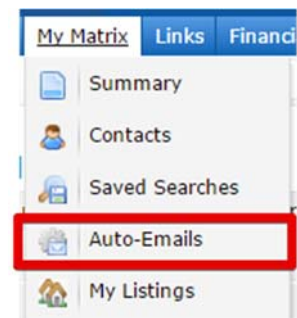
Alternate setting: Concierge Mode: The Concierge mode is an alternate to a scheduled auto email. When the Concierge mode is used the Member will be presented with a list of properties that match the selected criteria that can be either approved and sent to the client or rejected and not sent. The list can be accessed from either the home page of matrix in the concierge widget or by clicking on the concierge alert link in the top left corner under the board logo.



Managing Auto Emails

Once an auto email is setup it can be managed and modified through the My Matrix -> Auto Emails Menu option. On the auto emails screen there is a list of all of the configured auto emails and the status that they are in. The status is indicated by a coloured circle:

-  Welcome email sent but activation link not clicked
-  Auto Email is active and sending updates
-  Deactivated, the contact is no longer receiving updates

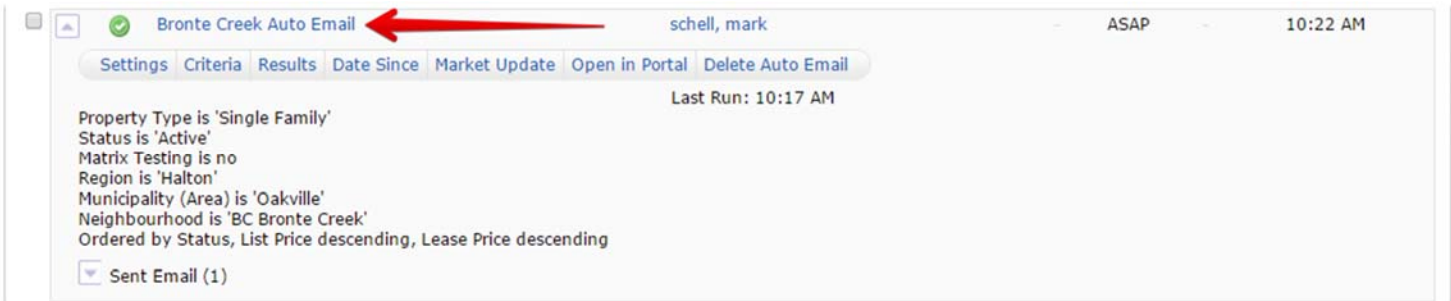


In Matrix there are only 3 ways that an auto email can become deactivated:

1. The Client unsubscribes from the auto email
2. The Member deactivates the auto email from the settings menu
3. The Auto Email goes 60 days without the activation link being clicked

As long as the initial activation link is clicked, the auto email will send until the Client or the Member deactivates it (NOTE: if the auto email goes 90 days without an update or new listing it will deactivate).

Working with the auto email: The settings and details of an auto email can be seen by clicking on the subject of the auto email. This will open the menu of options for the Auto Email.



- **Settings:** access the settings for the auto email and adjust them, this includes the contacts, schedule and messages/subject line. The auto email can also be disabled from this menu
- **Criteria:** Adjust and change the criteria for the auto email. This will immediately be reflected in the client's portal
- **Results:** Show all listings that currently match the criteria of the auto email and update the last run date
- **Date Since:** Show only listings that match the criteria and are either new or have a status change since the last run date
- **Market update:** Search for price and status changes within a period of time
- **Open in Portal:** Open a BCC version of the client portal to view the client's activity, this will be discussed in the portal section
- **Delete Auto Email:** completely remove the auto email from the system (note this is a final delete and the auto email cannot be recovered)

Input

The Input Tab in Matrix located at the top of the screen is where members create, edit and report the listings that they are entering on the system. In this section, we will be going through the steps on how to start, edit, and complete a listing for display

Starting a Listing

To start the listing click on the Input tab at the top of Matrix and then click on “Add New” under listings, and then select the property type of the listing:



After selecting the property type you will have 3 ways of starting a listing

Clone from an existing listing: This is the default option after selecting the property type. This option allows a listing to be started with information from a previous listing. To clone either fill in an MLS® number or perform a search to find a listing to clone from and click “Fill from”

A screenshot showing two options for cloning a listing. On the left, there is a section titled 'MLS® Number from which to Fill' with a text input field containing '305XXXX' and a blue button labeled 'Fill From'. On the right, there is a section titled 'Search for pre-existing Cross Property Listing from wh' with a table. The table has columns: 'Click to Fill', 'Chg Type', 'MLS #', and 'S'. The first row has 'Fill' under 'Click to Fill', 'Sold Closed' under 'Chg Type', and some icons under 'MLS #'. The second row has 'S' under 'S'.

NOTE: It is recommended you only fill from your own listing to avoid unintended mistakes or omissions.

Fill From GeoWarehouse: This option will fill several fields about the listing automatically from GeoWarehouse. Click the Fill from GeoWarehouse button at the top of the page,

A screenshot showing three buttons: 'Fill from Cross Property', 'Start with a blank Listing', and 'Fill From GeoWarehouse'. The 'Fill From GeoWarehouse' button is highlighted in blue.

then enter the address (note: do not enter the street type) and click search, then click Fill beside the property to start the listing with the information from GeoWarehouse

A screenshot showing the 'GeoWarehouse Property Information Search' form. On the left, there is a form with fields for 'PIN (9 digits)', 'City', 'Street #', 'Street Name', and 'Unit #'. Below these fields, there is a note: 'By using this feature, the following will fill into your listing. Always verify the data, especially the pieces of the Address.' Below this note, there is a table with three columns: 'PIN', 'Legal Description', and 'Street #'. The first row contains 'Assessment', 'Lot Depth', and 'Street Name'. The second row contains 'Assessment Year', 'Lot Frontage', and 'Street Suffix'. The third row contains 'Assessment Roll Number', 'Seller Name', and 'Unit #'. The fourth row contains 'Street Direction Suffix', 'City', and 'Postal Code'. On the right, there is a section titled 'Search for pre-existing Property Record from which to Fill' with a table. The table has columns: 'Click to Fill', 'PIN', 'St #', and 'Street Name'. The first row has 'Fill' under 'Click to Fill', '2' under 'PIN', and some icons under 'St #' and 'Street Name'.

Starting With a Blank Listing: This is the most basic way to start a listing. Click Start with a blank listing and this will open the entry page for a new listing with no information.

Navigating the Listing Input Screen

When entering or editing a listing it is broken up into several different sections. To move between these sections, use the Navigation tabs at the top of the input screen



DO NOT USE THE BACK BUTTON, if the back button is pressed there is a possibility of the listing becoming corrupted or the information entered being lost.

Input Sections:

General: This contains the basic information about the address, transaction, price, and taxes/assessment.

Map: Plot the physical location of the property

Additional/Condo Information: Exterior, Interior and condominium details such as construction, building style, fees, etc.

Lease/Rental: Lease information such as what is included, payment methods and what is required

Waterfront: Details about the access to waterways and bodies of water

Rooms/Details and Comments: Room entry and remarks, inclusions and exclusions

REALTOR/ Brokerage information: information on the listing salespeople, commission, and lockboxes/appointments/Signs

Tips and Tricks

General

- Fill out all yellow fields, they are mandatory and needed for the listing to be submitted

Map

- Use the “Set Lat/Long manually” Link to set the location. Click on the map to place the pin and define the lat and long for the property

Additional/Condo Information

- Total Parking spaces fills on its own when submitted with a combination of Driveway and Garage spaces

Room Entry

The screenshot shows a web-based form titled "Rooms" with an "MLS#" field in the top right. The form is organized into several sections:

- Room Level:** A dropdown menu with a question mark icon.
- Room Type:** A dropdown menu with a question mark icon.
- Room Measurement:** A dropdown menu currently set to "IMPERIAL" with a question mark icon. Below it, a note reads: "Choose the measurement and enter the numbers only for that set. The system will calculate the other values."
- Length:** Three input fields for "Length Ft", "Length Inch", and "Length Meters", each with a question mark icon.
- Width:** Three input fields for "Width Ft", "Width Inch", and "Width Meters", each with a question mark icon.
- Height:** Three input fields for "Height Ft", "Height Inch", and "Height Meters", each with a question mark icon.
- Room Features:** A list of checkboxes with a question mark icon: "1-Piece", "2-Piece", "3-Piece", "4-Piece", "5+ Piece", "Accessible", "Adaptable", and "Bay window". A "Delete" button is located to the right of this list.
- More:** A button at the bottom right of the form.

When entering rooms follow these steps:

- Set the Level of the room
- Set the room type
- Set the measurement unit you are going to enter into the room, the system will accept both Imperial and Metric measurement
- Enter the measurements for the room. If entering in Imperial split the numbers into 2 pieces, the feet and the inches and enter in the appropriate box. Do not enter both measurement types, the system will convert it when the listing is submitted
- Enter the Room Features. These are not mandatory except for Bathrooms. If a piece count is not selected from the features it will not count as a bathroom in the final listing.
- Click more to add the next room

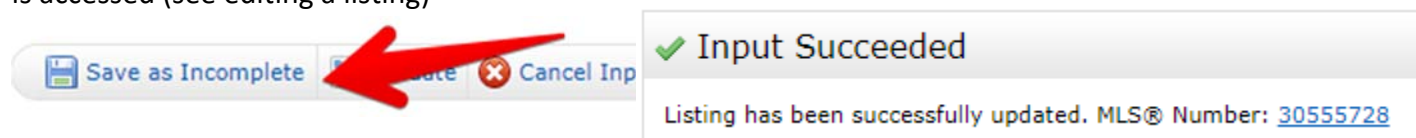
The order in which rooms are entered is changed when the listing is submitted. It will be rearranged to show all the rooms on the Main level, then Second level, then basement for the finished listing.

Submitting/Saving a Listing

When the information is entered for the listing there are 2 options, saving as incomplete or submitting the listing as live and active.

Validate Button: The validate button is used to check what mandatory fields are still required to be filled out as well as update the mandatory fields based on other selections throughout input.

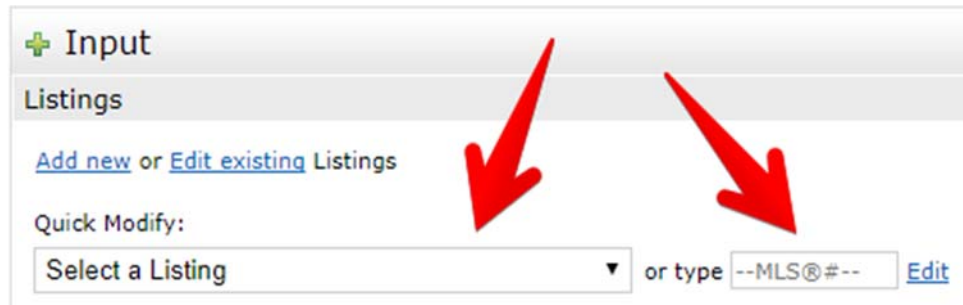
Saving as Incomplete: Saving a listing as incomplete will create a version of the listing with the incoming status and only be visible to the listing agent. This can be done for several different reasons: not complete yet and need to leave the computer, waiting for signature or other documentation, or just to pre-load before the commencement date (note: it still needs to be activated manually). To save a listing as Incomplete, at any time click the save as incomplete button at the bottom of any page of the input, this will save the listing and issue an MLS® number, this number is now the listing number until the listing is completed (either sold or expired). The listing can be accessed again by editing the listing the same way an active listing is accessed (see editing a listing)



Submitting a Listing: When the listing is completed and ready to be made live click the Submit listing button at the bottom of the page. This will check the listing to make sure that all mandatory fields are filled out and there are not data errors. If there are any errors a red exclamation mark will appear on the tab and beside the field with the issue. If input is successful the Input Succeeded screen will appear and the listing is now live on the system.

Editing Listing

To edit a listing or report it sold click on the input tab at the top of matrix, then either select the listing from the drop-down box under listings or enter the MLS® number in the quick modify box.



The screenshot shows the 'Input' tab interface. Under the 'Listings' section, there is a link 'Add new or Edit existing Listings'. Below this is the 'Quick Modify' section, which includes a dropdown menu with the text 'Select a Listing', a text input field with the placeholder '--MLS®#--', and an 'Edit' button. Two red arrows are overlaid on the image: one points to the 'Add new or Edit existing Listings' link, and the other points to the 'Quick Modify' section.

This will take you to the Modify Listing Screen where the listing can be modified.

Property Type Add/Edit: This will open the input form again so that the details can be modified. If working with an incoming listing the Submit Listing button can be used on this page to make it Active

Price Change: This is used to modify the price of the listing (NOTE: if there was an error on entry contact the Board to correct the price)

Comments/Additional URLs: This page is used to update the comments, Maps and where virtual tours are added to the listing.

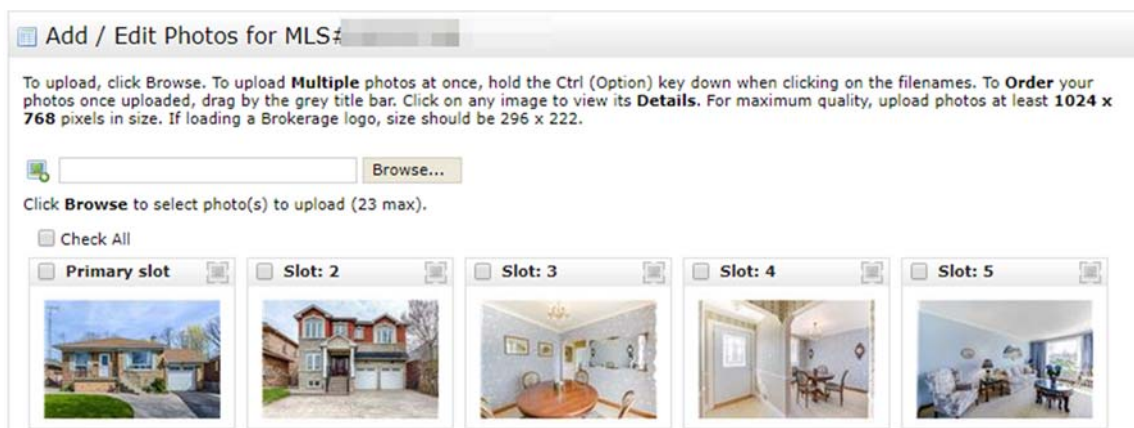
Open Houses: Book up to 10 open houses for the property to be displayed on Matrix and REALTOR.ca.

Delete Incoming Listing: Remove an incoming status permanently from the system

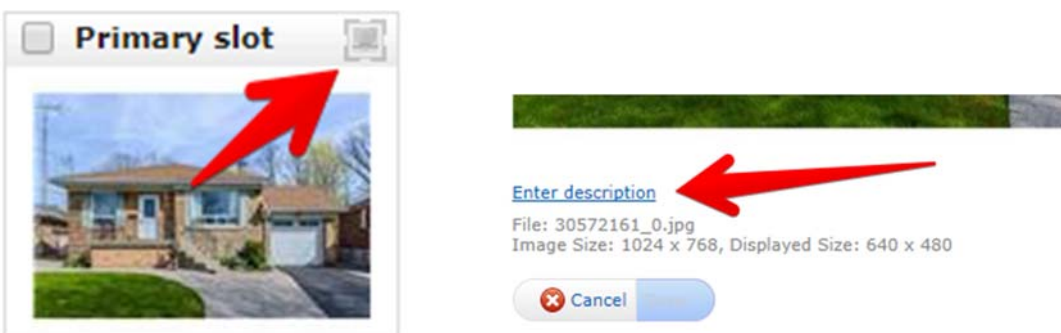
Photos and Supplements

Photos and supplements are added to the listing after it has been saved as incomplete or submitted as live to the MLS® system. Both are added by going through the input tab and selecting the listing.

Adding Photos: Click the manage photos link at the bottom of the modify listing page. Use the browse button to find the pictures on your computer. Up to 50 can be loaded to the listing and the recommended size is 1024 X 768. After adding the photos, they can be re-arranged by clicking and holding on the Slot number and then moving the photos into the desired order. Click save to upload the photos to the listing. Note: it can take up to 2 minutes for the photos to appear on the system.



To add descriptions to photos, click on the box in the upper right-hand corner, then click Enter description, type in the description. To finish click done then save.



Front of the house

[Done](#)

Adding Supplements: Supplements are added to the listing by clicking on the manage supplements link on the modify listing page. There can be up to 5 supplements with a maximum total size of 10 mb. It is also recommended that only PDF files are used for supplements. Click the choose file button to find the file on your computer (note, unlike photos supplements need to be uploaded one at a time), give the Supplement a description and select a type from the drop-down box, click upload and this will add the supplement to the queue for upload. Click save and the supplements will be added to the listing and become available for Agents to see.

Manage Supplements for 30555728

File Name	Description	File Size	Type
Schedule b.pdf	Schedule B	0 kb	Sched

Add Supplement (10MB max)

Supplement Description

Select File No file chosen

Supplement Type

Reporting Sales

To Report Sales, click on the Input tab and edit the listing. Then use the change to sold pending or change to active – continue to show/no showings options to report the sale

Conditional Sale: For conditional Sales use either “Change to Active – Continue to Show” or “Change to Active - No Show”. Enter the conditional date and the conditions and click Submit Listing to report the conditional sale to the system.

Change to Active - Continue To Show

Conditional Date

Conditional Sale Indicator

Conditions of Sale

- 12 Hr Escape Clause
- 24 Hr Escape Clause
- 48 Hr Escape Clause
- 72 Hr Escape Clause
- Other Escape Clause
- Building Permit
- Condo Documents
- Credit consent

Firm Sale: To report a firm sale on a property click the “Change to Sold Pending” option, enter the sale date, price, closing date and the code of the co-operating salespeople (to find the code the “find a sales person link” can be used). The sale will close automatically after the closing date entered.

Change to Sold Pending

The system will automatically change a Sold Pending listing to Sold Closed on the Sold/Close Date. You do not need to edit it again.

Sold/Pending Date

Price (Sold/Leased)

Sold/Close Date

Sale Comments

(lease price=#of sqft / metres x lease rate x term)

[Find a Salesperson](#)

Coop Salesperson 1 MLS® ID

Refresh

Use NonMLS as the ID if it is an out-of-board person. You will get a tab above to enter their info.

Salesperson

Name:

ID:

Brokerage

Name:

ID:

Reporting a non-member sale: If the co-operating salesperson is not a member of an ORTIS regional board use the code NONMLS for the coop sales person, then click the refresh button. To enter the salespersons information, click the NONMLS Coop Salesperson button at the top of the change to sold pending screen and enter the salespersons information

Status

NONMLS Coop Salesperson

NonMLS Coop REALTOR® & Brokerage Information

MLS#:

Board ID

CREA ID

Full Name

Email

Direct Work Phone

Office Name

Office Phone

Office CREA ID



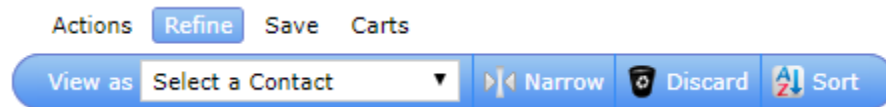
Barrie & District
Association of
REALTORS®

Matrix Advanced Tools & Skills



Advanced - Refine Tools

There are many tools that can be used in Matrix to assist in sorting, displaying and using the search results. These tools are located at the bottom of the search results under the refine menu.



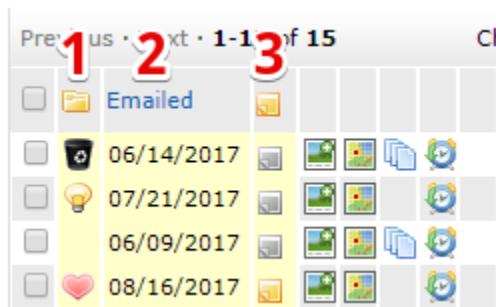
In this section, the options of the refine menu will be explored.

View As

The View As drop-down box will show additional information on the properties listed based on the contact that is selected from the drop-down box. It will display the Folder, Emailed and Note column on a single line display, and additionally Last emailed, View count and last view on the full display

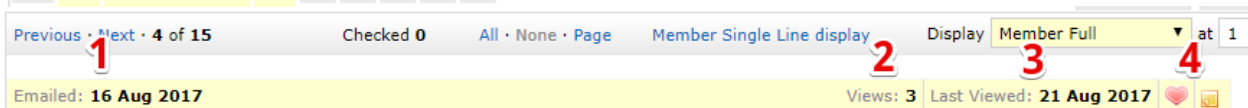
Once a contact is selected from the drop-down box the additional information will appear as follows:

Single Line Display



1. Folder Column: If the Contact has marked the listing as a Favorite (Heart), Possibility (Light Bulb) or Discarded (Trash Can)
2. Emailed: The Last Date this listing was Emailed to the Client
3. Note: Click on this Icon to see any notes on this property

Member Full Display



1. Emailed: Date the listing was last emailed to the contact
2. Views: Number of times the contact has viewed the full version of this listing on the client portal
3. Last Viewed: The last date that the contact has viewed this listing in a full report on the client portal
4. Folder/Note: If the client has marked this listing and if there are notes on this listing

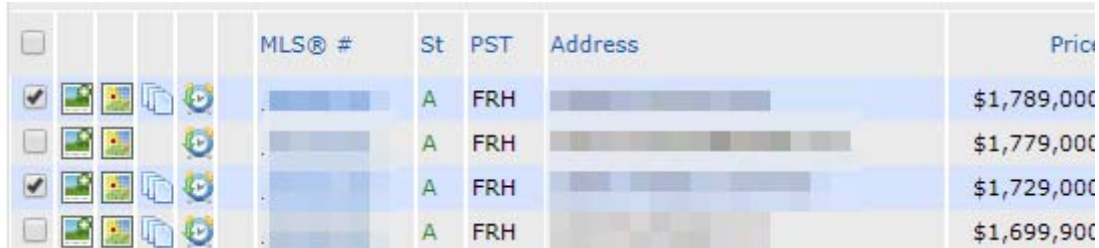
The contact can be changed at any time on the results to see the specific information about that contact.

NOTE: The Folder, Email and Note columns can be sorted by clicking on the column heading to change the sort order of the listings based on that column.

Narrow

The Narrow button will remove all listings from the results except selected listings. This can be used to create an easy list for viewing the properties on the results page

1. Select listings to view

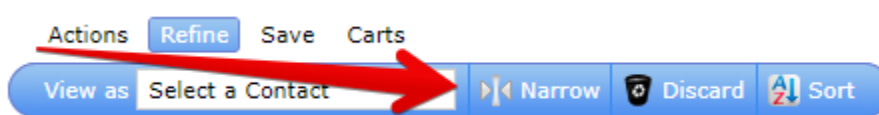


	MLS® #	St	PST	Address	Price
<input checked="" type="checkbox"/>		A	FRH		\$1,789,000
<input type="checkbox"/>		A	FRH		\$1,779,000
<input checked="" type="checkbox"/>		A	FRH		\$1,729,000
<input type="checkbox"/>		A	FRH		\$1,699,900

2. Click Refine

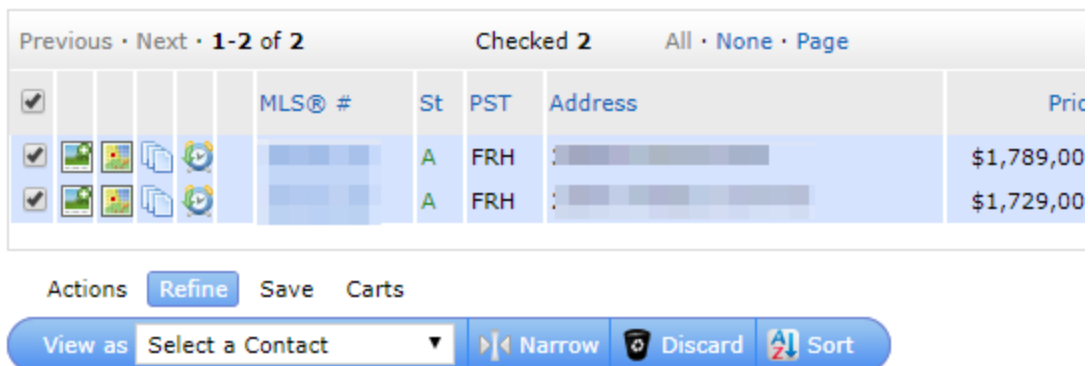


3. Click Narrow



4. The only listings that will now be displayed are the selected listings

Narrowed Original Results



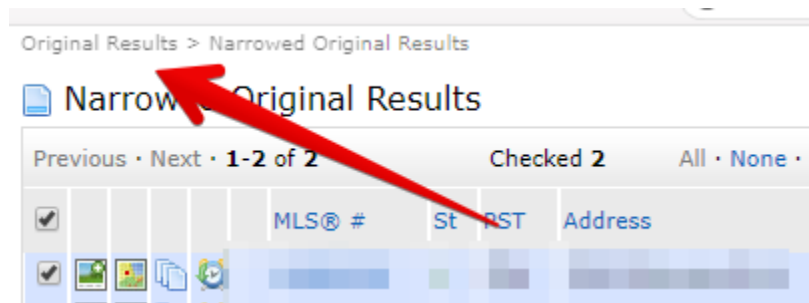
Previous · Next · 1-2 of 2 Checked 2 All · None · Page

	MLS® #	St	PST	Address	Price
<input checked="" type="checkbox"/>		A	FRH		\$1,789,000
<input checked="" type="checkbox"/>		A	FRH		\$1,729,000

Actions Refine Save Carts

View as Select a Contact Narrow Discard Sort

To return to the original results click the “Original Results” link in the upper left corner of the screen



Discard

The discard function removes the checked listings from the results list.

1. Select listings to discard

<input type="checkbox"/>		MLS® #	St	PST	Address	Price
<input checked="" type="checkbox"/>			A	FRH		\$1,789,000
<input type="checkbox"/>			A	FRH		\$1,779,000
<input checked="" type="checkbox"/>			A	FRH		\$1,729,000
<input type="checkbox"/>			A	FRH		\$1,699,900

2. Click Refine



3. Click Discard



4. The listings that were selected will now have been removed from the results

Click Un-discard to return the discarded listings to the results list



NOTE: This can be used to eliminate listings from the list as viewed or remove listings that will be sent in the initial email for an auto email.

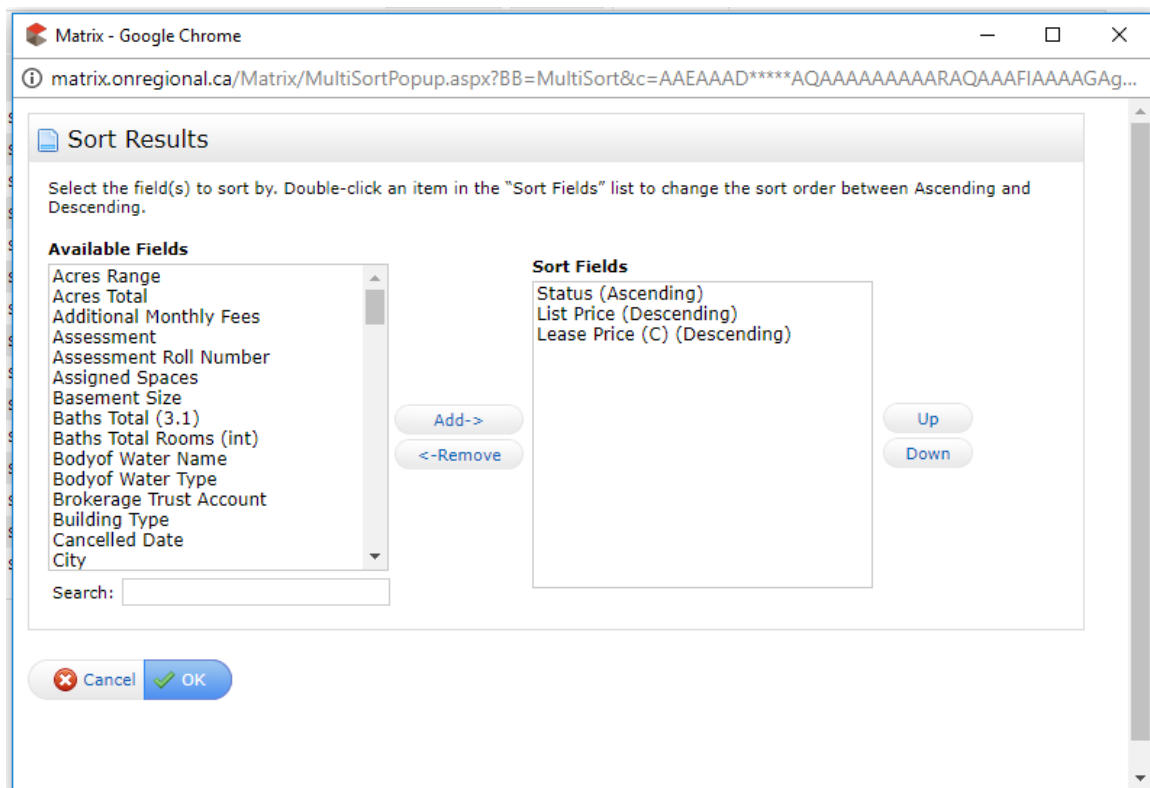
Advanced - Sort

The sort button allows the creation of a multi layered sort. Using the sort menu different columns can be arranged so that the results can be displayed and organized in a very flexible way.

1. Go to the results
2. Click Refine



3. Click sort



Select the columns to sort by from the right-side list and click the add button to put the column into the sort order. Use the up and down buttons to set the order to sort by. Double click on a column on the right side to change from ascending to descending. Click the OK button and the sort order will be applied

NOTE: This sort order can also be set as the default using the Gear icon in the top right corner of the search results.

Advanced - Listing Tools

The My Listings page in Matrix offers many tools to help you work with, evaluate, and report on your listings past and present. To get to the My Listings hover over the My Matrix tab at the top of Matrix and click My Listings.

My Listings (4)

Show My Incoming Listings 1 Search: -- MLS # -- 2 [Click here to run this as a Full Search](#)

Previous · Next · 1-4 of 4 · Checked 0 · All · None

			MLS® #	St	PrTy	SubTy	Address	Price	Municipality/Area	Neighbourhood
<input type="checkbox"/>				I	SF	CND			1 - Oakville	1013 - OO Old Oak
<input type="checkbox"/>				I	SF	FRH			1 - Oakville	1013 - OO Old Oak
<input type="checkbox"/>				I	SF	FRH			1 - Oakville	1013 - OO Old Oak
<input type="checkbox"/>				I	SF	FRH			1 - Oakville	1013 - OO Old Oak

Edit Manage Photos Manage Supplements Share Reverse Prospect Print 4

1. Show Drop-down Box: Change what is being viewed on the page
2. Run as a Full Search: This will move the listings to a full results screen and have all the search tools available
3. Listing Display: Shows the details about the listing
4. Tool Bar: All of the listing tools available

Editing and Managing a listing from My Listings

Listings can be edited and managed from the My Listings page. Check off the listing to work with and then click on one of the tool buttons at the bottom of the list

Edit Manage Photos Manage Supplements Share Reverse Prospect Print

- Edit: Access the Modify Listing page
- Manage Photos: Add, remove and arranged photos for this listing
- Manage Supplements: Add and manage the supplements attached to this listing
- Share: Create a share link for this listing (only available for active listings)
- Reverse Prospect: Run the Reverse Prospecting report (only available for active listings)
- Print: Print the selected listings

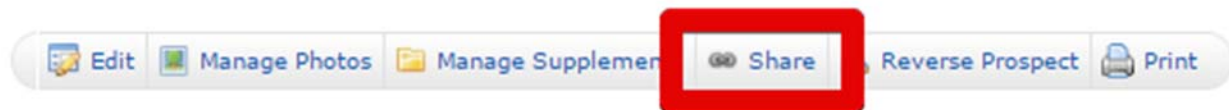
NOTE: The listing can also be edited through the Input tab and selecting the listing from the quick modify drop-down or entering the MLS® number in the box

Advanced - Creating a Share Link for Listings

A Share link allows your listing to be viewed by members of the public and shared through social media and websites. The Share Link displays a live version of the listing when the link is clicked, because of this even if changes are made to the Listing itself the share link does not need to be updated.

To create a share link:

1. Go to the My Listings Page
2. Select My Active listings from the Show drop-down box
3. Select the listing to be shared
4. Click the Share button

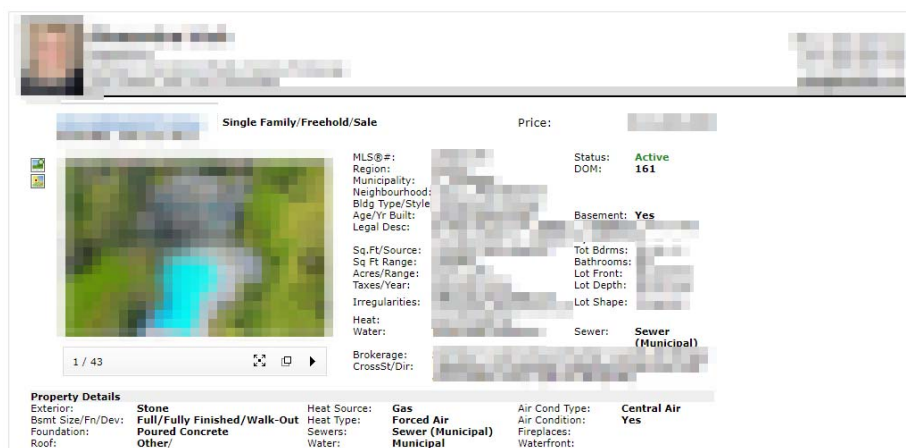


This will bring up the Share Listing Link Window. Copy the link in the window and paste it to share the listing.



NOTE: The listing share link is longer than the box it is displayed in, make sure the entire link is selected when copying

The link will display a client friendly view of the listing and contain the Agent Header at the top of it with all the contact information.

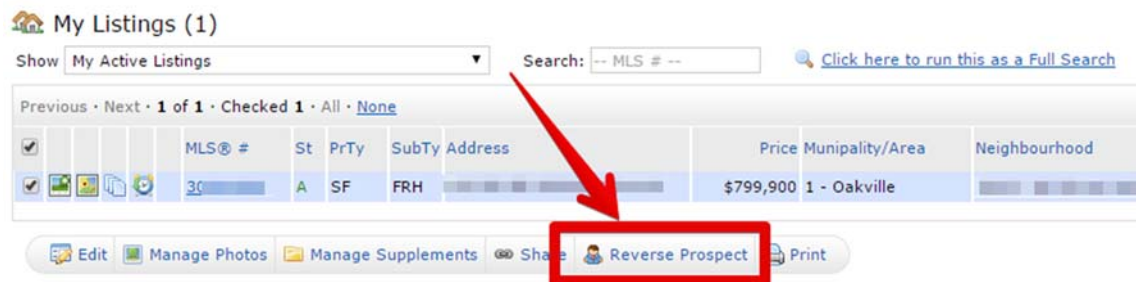


Advanced - Reverse Prospecting

Reverse prospecting is a report that can be generated for on market (active) listings that shows Members that have included the subject property in an auto email. The report displays the members contact information, the number of results for the auto email, the date the property was sent, and if the subject property was sorted by the client (favorite, possibility or discarded).

Running a Reverse Prospecting Report

To access the Reverse Prospecting report, go to the My Listings page located under My Matrix. Select My Active Listings from the show drop-down box to see all the listings available to reverse prospect. Select the listing to run the report on and click the Reverse Prospect button below the listings. This will open the reverse prospecting report for that listing and display all the auto emails that have included that listing.



Reverse Prospects Results Screen

On the reverse prospects results screen there is a display of the Members that have included the listing in an auto email

The screenshot shows the 'Reverse Prospect Results for 31' screen. It includes a table with the following columns: Agent, Ref #, Pre-approved?, Count, Date Sent, Email, Office Name, and Phone. The table lists several agents and their associated data.

Agent	Ref #	Pre-approved?	Count	Date Sent	Email	Office Name	Phone
	69525		64	04/07/2016			
	67673		69	04/07/2016			
	98274		157	04/07/2016			
	28249		71	04/08/2016			
	83272		145	04/07/2016			
	21733		153	04/07/2016			
	43637		490	04/07/2016			
	82592		6	04/07/2016			
	77812		7	04/07/2016			

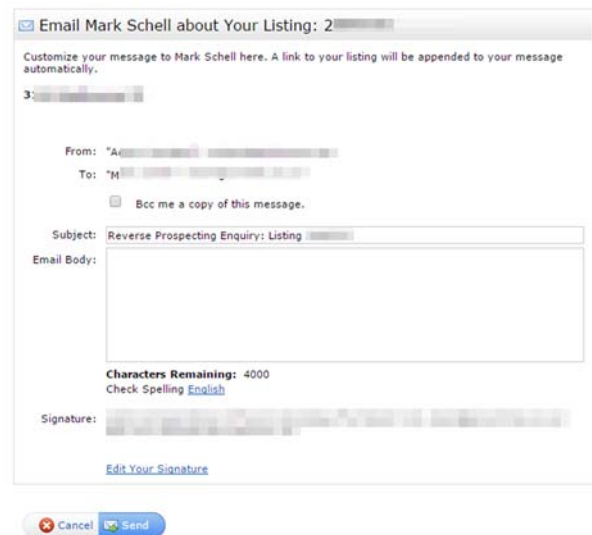
- Agent: Name of the agent that sent the auto email
- Ref #: Reference number of the contact that received the auto email
- Envelope: if a reverse prospect email has been sent an icon will appear here
- Count: Number of unique listings in the auto email
- Date Sent: date the listing was sent in the auto email
- Folder: If the listing has been marked as a favorite or possibility the icon will appear here
- Email, Office Name, Phone: Contact information for the agent

Reverse Prospecting Messaging

The reverse prospecting results page has the ability to directly email a Member that has sent out the subject property in an auto email. Click on the name of the member to open the reverse prospecting message page.

On the reverse prospecting message page an email message can be composed to the member. After entering in a message click the send button to deliver the message to the members email that is registered with the board.

Matrix also stores a history of all sent and received reverse prospect messages. This can be accessed by clicking on My Matrix then clicking on the Reverse Prospect History link under My Listings.



Advanced - Hit Counter

The Hit counter will give an indication of how active the listings are on the Matrix system and in the client portals. It displays information about both the agents and client's views of the listing.

To access the hit counters, follow these steps:

1. Go to My Matrix => My Listings
2. Use the Show drop-down box to select Hit Counters
3. The hit counters for all active listings will now be displayed



ML #	Stat	Type	Address	Price	Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Prev 7 Day Views	Agent Published	Agent Rejected	Agent Views	Agent IDX
1	A	SF	1	\$988,500	596	742	0	1	602	48	26	2	16	1405	0
2	A	SF	3	\$1,899,000	233	299	2	1	225	19	10	2	4	757	1
3	A	SF	1	\$229,500	207	239	2	1	210	23	11	5	17	721	1
4	A	SF	8	\$589,500	146	213	2	1	135	26	25	7	2	634	0
5	A	SF	9	\$399,500	418	574	0	5	436	72	39	15	22	632	0
6	A	SF	2	\$1,799,900	134	82	1	0	132	47	47	0	1	291	0
7	A	SF	7	\$249,500	471	254	2	0	521	131	131	10	12	147	0
8	A	SF	2	\$479,500	0	0	0	0	0	0	0	0	0	0	0

- Client Portals: the number of portals the listing has reached, either by Direct or Auto Email
- Client Views: the total number of times the listing has been viewed as a Full Display in a Portal
- Client Favorites/possibility: the number of clients who currently have this listing marked as a Favorite in their portal
- Auto Emails: the total number of Auto Emails that exist in the system for which the listing meets the search criteria
- Prev 14/7 Day Views: unique number of times the listing has been viewed in the past 14/7 days
- Agent Published/Rejected: The number of times the listing has been published/rejected in a concierge auto email
- Agent Views: The number of times this listing has been viewed as a full report by agents

Advanced - Carts

The Carts in Matrix are a way of collecting, storing, sorting and watching listings of interest. Carts are used as a temporary storage location for listings. There are two types of carts available to use, Client carts and the Cross Property cart. Cross Property carts contain listings added from searches but not for a specific client. Client carts are unique to each individual contact setup in the contact list, these carts are created automatically every time a contact is created. Contact carts do not automatically email or notify contacts, but they do add the additional contact specific information like emailed and folder. Listings in carts are live versions of listings, the listings will also stay in a cart until removed.

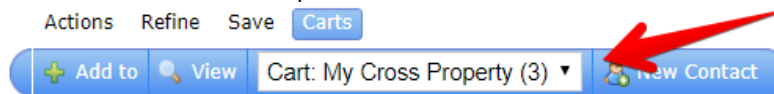
Adding Listings to the Cart

To add listings to a cart on the search screen follow these instructions

1. Select the listing(s) to be added to the cart
2. Click the Carts menu below the search results



3. Select the Cart from the drop-down box



4. Click "Add to" to add the listings to the cart

NOTE: The number beside the cart will increase, if it does not then the listing is already in the cart

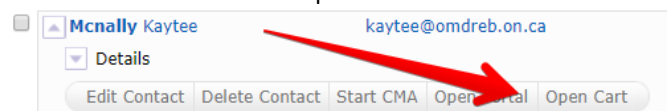
Viewing the Carts

There are several ways the carts can be accessed to see the listings in them:

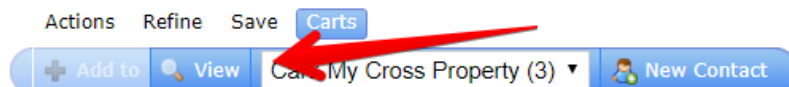
My Carts Widget: On the home page of Matrix there is a My Carts widget, click on the cart to see the listings. NOTE: This widget only shows recently used carts



My Contacts: In the Contacts menu click on the contact and then click the Open Cart Button

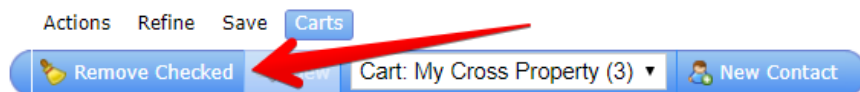


Search Results: Click the Carts button below the search results, select the cart from the drop-down box and click View



Managing the Carts

Once a cart is opened the listings in it can be viewed and managed. View listings in the same way they are viewed in any other search. To remove listing(s) select the listing(s), click carts and then click remove checked.



Listings can also be printed, emailed, or added to CMA's using the same buttons as a normal search results.

Advanced - Saved Search

Saved searches in Matrix are used to preserve a set of criteria so that they can be used later. This can be useful for quickly performing the same search multiple times.

Creating a Saved Search

To create a saved search first start with a fresh search and set the criteria for the search to save. On the results screen for the search click the save button below the results and then click on the New Saved Search button.

This will open the Save a New Saved Search screen. On this screen all of the settings for the saved search are defined.

A screenshot of the 'Save a New Saved Search' form. At the top, there's a toolbar with 'Actions', 'Refine', 'Save', and 'Carts'. Below it is a row of buttons: 'New Saved Search' (with a document icon), 'New Auto Email' (with an envelope icon), and 'New Speed Bar Shortcut' (with a lightning bolt icon). A red arrow points to the 'New Saved Search' button. The form itself has a title bar 'Save a New Saved Search'. It contains a 'Search Name:' text input field, a 'Contact:' dropdown menu with a 'Create a New Contact' link, and a checkbox labeled 'Enable as Favorite Search on Home tab (10 maximum)'. Below this is a section titled 'Criteria' with a list of criteria: 'Status is one of 'Active', 'Conditional Sale'', 'District is 'OA Oakville'', and 'SubDistrict is 'BC Bronte Creek''. At the bottom of the form are 'Cancel' and 'Save' buttons.

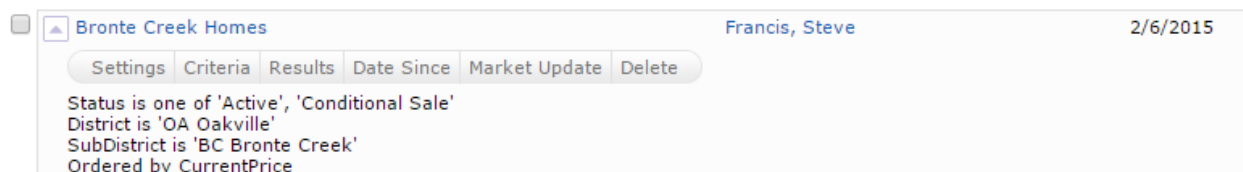
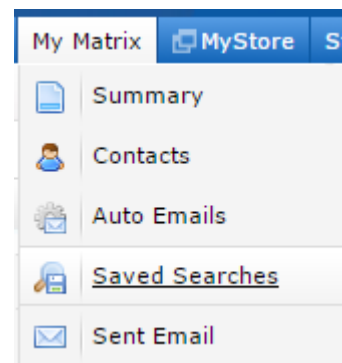
First the search name is set. This is how the search will be displayed on the menus as well as the favorite search widget. Next the contact is setup for the search. This is an optional step that adds additional options to the search. If a contact is selected when the search is run it will be displayed as if the View As option was used for that contact. Finally, there is an option to set the search as a favorite search. If this option is selected the search will be displayed in the My Favorite Searches widget on the home page of matrix.

Using Saved Searches

To run a saved search hover over My Matrix and click Saved Searches. This will take you to the saved searches page. On this page you can run and manage the searches. To just see the results of the search, click on Results after clicking on the name of the saved search.

Subject	Contact Name	My Last Run
Bronte Creek Homes	Francis, Steve	2/6/2015
bronte creek homes 2	Francis, Steve	4/15/2014
Bronte Creek Homes 2010/2014	Francis, Steve	10/20/2014

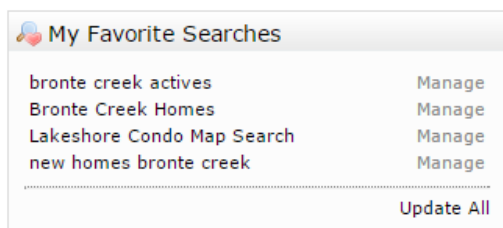
To access a search, click on the name of a search. This will open the menu for the saved search. On this menu there are several different options.



- **Settings:** Adjust the name, contact, and if the search is a favorite search. Clicking this takes you back to the save search settings screen. There is a link at the top of this screen that when clicked will allow you to turn the saved search into an auto email (see creating auto emails in the Quick Start Guide for instructions on how to create auto emails)
- **Criteria:** this allows the criteria of the search to be updated
- **Results:** Displays all results for the defined criteria
- **Date Since:** Displays all results that are new since the last run date (displayed on the far-right side of the search)
- **Market Update:** search results for either status or price changes within a time period
- **Delete:** Permanently delete the saved search

Favorite Search

A search marked as a favorite search can be accessed and run from the home page of Matrix using the My Favorite Searches widget. To run the search and see the results click on the name of the search. To see how many new results there are for all favorite searches since the last time the search was run click the Update All link. To access the Saved Searches page and manage a search click the manage link beside the search to be managed.



Advanced - Stats

The Matrix system offers a stats module that can be used to compare up to 2 sets of data in either a chart or graph format. Within the module there are several prebuilt comparisons as well as the ability to create custom comparisons. The comparisons can draw data from the entire database and be customized or limited to create a fully customized and personalized comparison. To access the stats module, click on the Stats tab at the top of Matrix.

Criteria for Reports

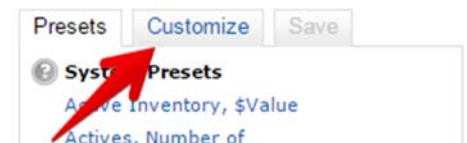
Before running the report, the criteria for the data can be set. To set the criteria for the report use the fields in the center of the stats module just like the criteria in a regular search. Any criteria selected will limit the data set that the comparisons draw from and display in the reports. The map can also be used the same way for stats as it can for a regular search.

Preset Comparisons

The stats module offers several common comparisons as preset reports. These reports can be used by clicking on them in the presets menu and then clicking the generate button. The report will then display the data based on the criteria selected.

Creating Custom Stat Reports

The stats module can create custom reports that compare up to 2 different statistics using a data set pulled by defined criteria. To start using the custom reports click the customize tab.



On the customize tab use the drop-down boxes to select the options for the custom report:

- Time Frame: how far back the data is drawn from
- Statistic: which statistic will be used for the report
- Group By: how the data will be collected and shown on the report

After choosing the Group By and Statistic options are selected an additional drop-down box called Chart Type will appear under Statistic. Use this box to modify how the stat is displayed in the report.

To add an additional stat to your report, click the Advanced options link. This will add the Secondary Statistic box. Use this box to select an additional stat to display in the report.

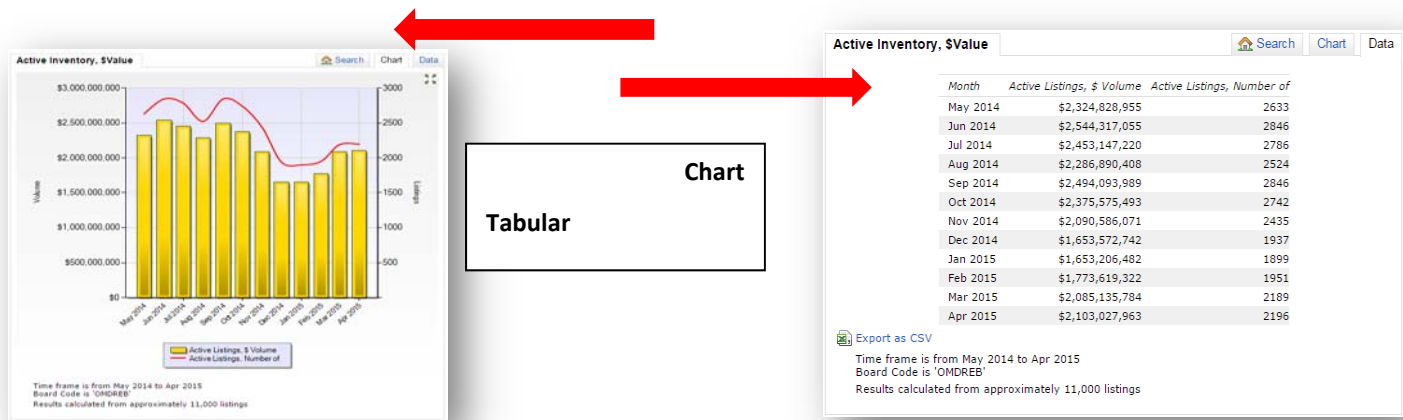
The Style Options link can be used to change the style and display options of the report. Once clicked the chart style menu will appear. The Color Palette drop-down box can be used to change the colors of the chart for the report. Fill style can be used to change how the bar and line graphs are filled for the report. The Display Values check box can be used to add the numeric values to the data points on the chart. The 3D Chart style will change the chart from a flat diagram to a dynamic 3d display. Once the options have been set and the criteria defined click the generate button to view the report.

A screenshot of the 'Customize' tab in the Stats module. It shows several configuration options: 'Time Frame' (None), 'Statistic' (None), 'Group By' (None), and 'Secondary Statistic' (None). Below these are 'Style Options' including 'Color Palette' (Default), 'Fill Style' (Plain), 'Display Values' (checkbox), and 'Use 3D Chart Style' (checkbox). The 'Presets', 'Customize', and 'Save' tabs are visible at the top.

Viewing the Report

By default the report will display the chart and the criteria. Click on the Data tab in the top right corner to display the numeric values of the report in a tabular form.





Saving Custom Statistic Reports

The custom statistic comparisons can be saved for use later. To save a custom stat comparison click the Save tab at the top left of the statistics screen. On this tab enter a name for the comparison to be saved as. Then the options for saving can be set:

- **Save Search Criteria with Preset:** Save the comparison so that it runs with the same search criteria every time
- **Show on Home Page Stats Widget:** This option becomes available when the "Save Search Criteria with Preset?" is selected. This option will display the comparison as an option in the "My Stats" Widget on the Home page of matrix
- **Save a Copy:** Use this to create a copy of an already saved comparison

The screenshot shows the 'Save the Current Preset' dialog box. It has tabs for 'Presets', 'Customize', and 'Save'. The 'Save' tab is active. It contains a 'Name:' field, two checkboxes ('Save Search Criteria with Preset?' and 'Show on Home Page Stats Widget?'), and three buttons at the bottom: 'Delete', 'Save a Copy', and 'Save'.

Emailing and Printing Statistics

Printing Statistics

To print of the generated statistics, click on the print icon in the lower left corner of the stats screen. This will open the print preview screen. On this screen the print options can be set and the report printed:

- **Hide Chart:** Do not print the chart
- **Show Tabular Data:** Show the table with the numeric data
- **Print:** Open the print dialog to print the report
- **Close:** Return to the stats screen



Emailing Statistics

To email the statistics, click the email button in the lower left corner of the stats page. This button will take you to the email page. On this page fill out the standard email form (to, cc, bcc, subject and message). You can also select to include the tabular data to the email. Once the form is filled out and the options selected click the send button to email a link to where the statistics can be viewed to the recipient.

Advanced - Quick Stat Report

The Quick Stats Report is an easy way of generating quick reports directly from a search results. It can be used to quickly create a report based on a criteria or area and contains useful information. To run a quick stats report, follow these steps:

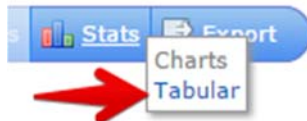
- 1) Perform a search in Regional Matrix
- 2) Select the listings to run the report on or click all at the top to select all the listings regardless of page



- 3) Click the Stats Button below the results



- 4) Click "Tabular" to see the report



This will generate the report broken down by property type, then status and if multiple statuses have been selected a total section

Market Analysis by Status										
Market Analysis by Status										
Property Type: Single Family (46)										
Status: Sold Closed (46)										
	Beds	Baths	Sq Ft Total	List Price	LP\$/Sqft	Sales Price	SP\$/Sqft	DOM	LP/OLP %	SP/OLP %
Min	2	1	1,015	\$1,850	\$1.00	\$1,850	\$1.00	2	91.63%	80%
Max	6	4	4,200	\$2,500,000	\$596.00	\$2,000,000	\$609.32	104	100%	105.01%
Avg	4	3	2,338	\$868,711	\$336.39	\$848,571	\$333.25	20	99.63%	98.36%
Median	3	2	2,194	\$929,900	\$423.42	\$914,900	\$415.21	13	100%	98.96%
Sum				\$39,960,700		\$39,034,259				



- **Sq. Ft Total:** Square Foot Total
- **LP\$/Sqft:** List price vs Square Footage Ratio
- **SP\$/Sqft:** Sales Price vs Square Footage Ratio
- **DOM:** Days On Market
- **LP/OLP %:** List price vs Original List Price Percentage
- **SP/OLP %:** Sales Price vs Original List Price Percentage

The report can also be changed to break the numbers down in a different way by clicking the drop-down box and selecting the “Sales Stats by Municipality, Neighborhood, type” option

Sales Stats by Municipality, Neighbourhood, Type

Sales Stats by Municipality, Neighbourhood, Type ▼

Municipality: 1 - Oakville (46)

Neighbourhood: 1000 - BC Bronte Creek (46)

Type: Apartment Unit (1)

	Sold Price	List Price	Ratio CP/LP
Avg	\$425,000	\$439,900	96.61%
Median	\$425,000	\$439,900	96.61%
Sum	\$425,000	\$439,900	

Type: Attached/Row (4)

	Sold Price	List Price	Ratio CP/LP
Avg	\$467,275	\$470,963	99.05%
Median	\$461,075	\$466,050	98.86%
Sum	\$1,869,100	\$1,883,850	

Type: Detached (18)

	Sold Price	List Price	Ratio CP/LP
Avg	\$1,235,206	\$1,280,970	97.57%
Median	\$1,212,500	\$1,233,500	98.11%
Sum	\$22,233,700	\$23,057,462	

Type: Townhouse (23)

	Sold Price	List Price	Ratio CP/LP
Avg	\$630,716	\$633,891	99.69%
Median	\$715,000	\$729,900	100.00%
Sum	\$14,506,459	\$14,579,488	

Back Printer friendly

Market Analysis by Status

Market Analysis by Status ▼

Market Analysis by Status

Sales Stats by Municipality, Neighbourhood, Type

Status: Sold (46)

This display will show the information broken down in to the various neighborhoods included in the search as well as the building type of the results.

Both stat reports can be printed by clicking the “Printer Friendly” button below the reports. This will bring up the printing dialog box, the report can then be sent to the printer or saved as a PDF.

Advanced - CMA Report Generator

The CMA report generator in Matrix is used to create reports for your clients. The report generator does not have any automatic calculation for the price of the property or any suggestions based on the added comparables. It is used only to create the report.

Explanation of CMA Pages

There are many available pages for use in the report. This list is a brief description of what all of the pages contain sorted by the category that the pages are located in:

Cover Sheets

- **Cover Sheet**
 - Standard opening cover page for your report
- **Cover Sheet with Agent Photo**
 - Standard opening cover page for your report with your agent photo

Subject/Adjustments

- **Summary List**
 - This page summarizes the comparable listings contained in this market analysis
- **Price Adjustments**
 - This page details the comparable listings contained in this market analysis as well as any manual data adjustments made by the user

Comparables

- **Minimums and Maximums**
 - This page summarizes key fields of the listings in this analysis
- **Days on the Market Chart**
 - This graph illustrates the number of days on market
- **Current and Sale Prices Bar Chart**
 - This graph illustrates the list price, along with sale price in Sold listings
- **Brief Summary**
 - This page summarizes the comparable listings contained in this market analysis
- **Full Summary**
 - An appraisal style view of the comparables. Summary that includes averages
- **Pro Report**
 - Brief description plus characteristics of each property. Sold price will be included if sold properties are selected
 - Statistics for each status. Active, Conditional, Sold, etc.
 - Summary Graph/Analysis for average minimum and maximum prices
 - Cumulative Analysis
 - Sold Property Analysis
 - Property Summary
- **Pricing Recommendations**
 - Use this page to put a recommendation and any notes to the client
- **Map**
 - This page will show your comparable listings on a map.
 - The page is comprised of a large map containing numbered pins and the addresses of each pin in a legend on the right.

Static (standard pages that are always the same regardless of your data)

- **Explanation**
 - This is an explanation and overview of this market analysis
- **Importance of Pricing**

- This chart highlights the importance of pricing correctly at market value
- **Activity vs. Timing**
 - This chart highlights the importance of pricing correctly at market value
- **Effects of Over Pricing**
 - This chart highlights the importance of pricing correctly at market value
- **Pitfalls of Overpricing**
 - Drawbacks of incorrectly pricing a property
- **Setting the Price**
 - Looks at the Seller's Desired Price and the Buyer's Desired Price
- **Sources of Buyers**
 - This page illustrates the primary sources of buyers for your property
- **Where Commission Goes**
 - How commission is divided amongst all of the parties involved
- **Benefits of a Realtor®**
 - Outlines the benefits of using a professional REALTOR® to sell your property
- **My Guarantee to You**
 - A performance guarantee
- **Steps to a Positive Showing**
 - Key steps to making a positive showing of your property
- **What it Takes to Show**
 - Additional showing instructions

Navigating the Report Generator

When working in the CMA Report Generator of Matrix do not use the back button, this will cause the loss of any work you have done on the current page. When moving from section to section use the Navigation bar located at the top of the screen:



By default, the sections will be greyed out but as you add pages the sections will become available to click. On the far right side there is also a save button (the diskette) and delete (the red X). When navigating from section to section the Report Generator will automatically save the work that you have done, this way if there is an issue you will have a copy of your CMA right up to the last time you switched sections.

NOTE: CMA's will remain in the system for 180 days after the last edit. After this they will be purged from the system and no longer accessible

Sections of the CMA Report Generator

Start:

Select the contact for whom you are preparing the CMA and give the CMA a description. The description is what will be shown in the CMA list

Pages:

In this section select the pages to be used in the CMA report. To add pages click them in the Available pages list and they will be added to the Selected Pages list. To change the order of pages select them in the Selected Pages List and use the arrows right of the box to move them up and down the list. To remove a page select it in the selected pages list and click the x to the right of the list. To upload a custom page, click the upload link below the available pages list. This will take you to the upload screen, click choose file to find and upload the file and then click save to have the file added to the Available pages list under the My Custom Pages heading. To use the page select it just like a regular page is selected.

Subject:

In this section the subject is setup for the CMA report. This can be done in one of 3 ways, search for a listing, enter an MLS® number or start with a blank form and fill it out.

Cover:

This section is where the information for the cover pages of the report can be set. If you selected a contact on the Start section their information will be prepopulated in the contact information section of the Cover area. After the Agent information has been filled out the “Set as default” link can be clicked, this will save the Agent Information and in future CMAs it will be prepopulated on this page. An alternate picture of the house and an agent photo can also be uploaded on this page by using the browse button in the appropriate section.

Comparables:

This is where they comparable for your subject can be added. There is 2 ways you can add comparables, first is to search and add comparables using the search built into the CMA section, to do this use the Search for Additional Comparables button, perform searches and on the results screen, select the desired properties and click the “Add Selected” button at the bottom of the results (NOTE: the comparables section is not limited to one search, as many searches as desired may be performed to find and add comparables to the report). The second way to add comparables is from the Carts, to do this click the “Add Comparables from Cart” button, this will take you to a carts list, the desired cart can be selected from the drop-down box. Select the properties to be used and click the “Add Selected” Button.

Map:

Nothing can be changed in this section.

Adjustments:

In this section the prices of the comparables can be adjusted based on the differences in the number and value of the features of the comparables versus the subject. To adjust an entire category, enter a value in the box at the top of the column. To adjust individual features on comparables enter a number in the corresponding box. To add custom categories, navigate to the Subject section and enter the category in the "Custom Fields" section.

Adjustment Details				View in Detail Mode		
Feature Value	Status	Price	Adjusted Price	# Beds Abv Grnd	# Beds Blw Grnd	# Bathrooms
1473 Elm				2,000		500
1496 Elm RD	Sold	382,000	382,000	3	0	2
2097 Elm RD	Sold	388,000	385,500	3	0	2
2030 Elm RD	Sold	390,000	387,500	4	(2,000)	3
1342 Rowlen RD	Sold	396,000	396,000	4	(2,000)	3
Low		382,000	382,000	3	0	2
Median		389,000	386,500			
Average		389,000	387,750			
High		396,000	396,000			

Pricing:

On this page notes can be entered to be displayed on a page in the report. This page also provides the low, median, average, and high prices for the comparables as well as the count. The suggested price box will display the text as bold and the notes will display the text in a regular font.

Finish:

On this page there is a summary of all of the pages and comparables, the address, and a picture of the subject property. From this page click "View CMA" to view the completed CMA before sending it out. Click the "Email CMA" button to send the CMA to the client. They will be provided a link to where they can download the CMA or View it online

Summary

The following table summarizes the prices calculated from the adjusted comparables:

	Low	Median	Average	High	Count
Comparable Price	382,000	389,000	389,000	396,000	4
Adjusted Comparable Price	382,000	386,500	387,750	396,000	4

Additional Analysis

This section provides some additional pricing statistics obtained by comparing the subject property with the comparables:

Suggested List Price

I think that you should list your house for 390,000 dollars

Characters Remaining: 190
Check Spelling [English](#)

Notes

This is the note section


Characters Remaining: 976
Check Spelling [English](#)

CMA Summary	
View CMA	Email CMA
Selected Pages	
Cover Sheet	
Cover Sheet with Agent Photo	
Summary List	
Price Adjustments	
Minimums and Maximums	
Days on Market Chart	
Current and Sale Prices Bar Chart	
Full Summary	
Brief Summary	
Pro Report	
Pricing Recommendations	
Map Layout	
Counts of Comparable Properties	
Sold: 4	

Subject Details


Prepared For: No Contact Selected
Subject Property: 1473 Elm

Subject Photo



Accessing and Editing CMA's

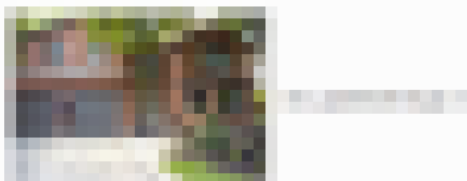
Saved CMA's can be accessed and edited through the My Matrix => My CMA's menu. To work with the CMA, click on the name of the CMA and this will show the menu

 393 lakeshore

Cross Property

08/02/2017

08/02/2017



Counts of Comparable Properties

Active:	2
Sold Closed:	2
Total:	4

Edit CMA

View CMA

Email CMA

Delete CMA

- Edit CMA: Access the CMA report wizard to edit any details
- View CMA: Generate the CMA as a PDF and open it
- Email CMA: Send the CMA as an email
- Delete CMA: Delete the CMA from the system permanently

Matrix Frequently Asked Questions

How To Access Matrix™

Where do I login to Matrix™

www.onregional.ca will take you to the Matrix™ login page.

What is the SSO (Single Sign On) Dashboard/Page?

The Single Sign On (SSO) Dashboard is the main page you view once logged into Matrix™. This will give you access to various BDAR resources unique to BDAR members!



What do I do when I am setting up Matrix® for the first time?

Visit www.bdar.ca/MatrixVideos to watch the “Matrix for New Users” video to see the steps to take as a new user.

Where Can I find a Matrix™ Quick Start Guide & Resources?

Visit www.bdar.ca/Matrix for the Quick Start Guide, FAQ and more.

Forms

Where can I find Matrix™ MLS® Data Forms?

Please visit <https://www.bdar.ca/Matrix> to access the MLS® Data Forms.

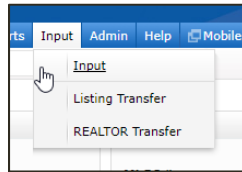
You can also find these forms on WebForms™ by:

1. Logging into WebForms™
2. Select “Printable Forms” Tab
3. From the drop-down menu on this page select “View Board Forms”
 - i. Here you will find forms for both Matrix™ and Stratus®

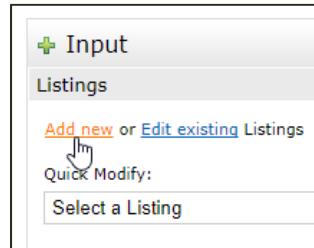
Tips for Inputting Listings Into Matrix™

How do I input a new listing into Matrix™?

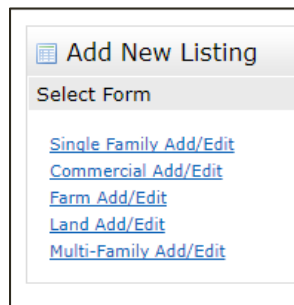
1. Select the Input Tab



2. Select Add New




3. Select the property type you wish to input.



Please Be Advised: You can not change the property type, once you selected it. For example, you wanted to input a commercial listing but started typing under single family, you must exit the listing, select commercial and re-input the information.

Multi-Family properties are any residential property with two (2) or more units. For example: Duplex, Triplex, Fourplex and so forth are Multi-Family


4. All fields marked in yellow are mandatory and must be completed.

Beside each field in Matrix™ there is a grey icon , this is the help icon. When you click on it, a pop-up dialogue box will open with additional information.

5. Once the listing is completed, select the submit

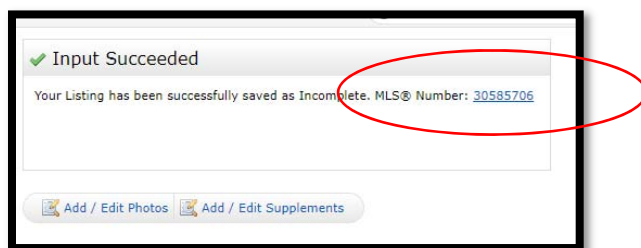
button at the bottom of the page



6. Mandatory fields that are missing information after you click submit will have a red  icon beside them. You must complete these; except for the Map Tab (for the time being)

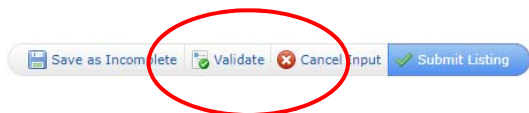


7. Once the listing information is corrected, select the submit button at the bottom of the page and an MLS® will be generated for you property
 - a. This will assign a Matrix™ MLS®# to the listing



What is the Validate Icon on the Listing Input Screen?

1. Once listing is in-put, select the validate button at the base of the screen



2. If "There were errors on the input form, this will display all of them.

What is the Street Table and How do I Use it?

1. When inputting a new listing and you are in the "General Tab"
2. Click "Auto-Fill these Address Fields"



3. A new dialogue box will pop open on your computer screen
 - a. Begin inputting your Listing Address information

Map Additional / Condo Information Waterfront Rooms / Details & Comments REALTOR® / Brokerage Information Staff Info Matrix Test TREB ML#

SearchPopupPage - Google Chrome

matrix.onregional.ca/matrix/components/UserInputcontrols/SearchPopup/searchPopupPage.aspx?UIC=628&Instance=Input_

Street Address

Region Street Name Street Type St Direction Board ID

Municipality City Or Not ☐

Neighbourhood

Run Search

4. Select "Run Search" and select the result you wish to use for your listing

Run Search

Where Can I Find a Barrie and Simcoe County Interactive Map?



1. Click the Links tab
2. Scroll to the bottom of the screen and you will find links

GO-Transit	Other
Simcoe County Interactive Map	Other
Simcoe County District School Board	Other
Simcoe Muskoka Catholic School	Other
French Catholic District School Board	Other
Registered Second Suites	Other

What are the Mandatory Fields on Stratus® that are not Mandatory on Matrix™?

Residential Fields Required in Stratus® in addition to those for Matrix™ include:

- Fronting on
- Lot Depth
- Holdover Days
- Pool
- Special Designation(s)
- Fireplace Stove (Y/N)
- Family Room (Y/N)
- **Total Number of:
 - Bedrooms
 - Bathrooms
 - Kitchens
 - Rooms

***Matrix™ auto-calculates the above total rooms based on member input & description.
Stratus® is an open input field.*

Dual System Input

What is BDAR's main MLS® System?

Matrix™ is the main MLS® System for BDAR. It is the system that provides a feed for Realtor.ca®.

I have input my Listing into Matrix™, do I need to input it into Stratus® too?

Yes. To help maintain data integrity and for additional market exposure, it is strongly urged that listings be input into Stratus® after it is input into Matrix™. Please refer to the graphic provided on the following page:

Two Systems Working for You, Your Data & Your Clients

Your Listing Starts Here

BDAR

MLS® System

STEP 1

Your Main MLS® System
Member/Brokerload as per Rules & Regs



REALTOR.ca

Prospects

All other feeds

Matrix™ **BONUS**

Assistant Access
Shared Identity

Additional Info
Statistics

CMA's
& More!

STEP 2

Your Additional MLS® System
Member or Brokerage Input for Immediate Exposure
or Contact BDAR for Board Load



ALL Listings Must Be On **BOTH** Systems

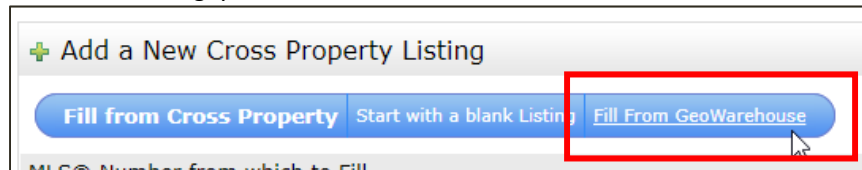
What is Square Footage Asking for in Matrix™?

Matrix™ request square footage for livable above grade dimension.

What is the Geo-Warehouse Auto-Fill Feature for new listings?

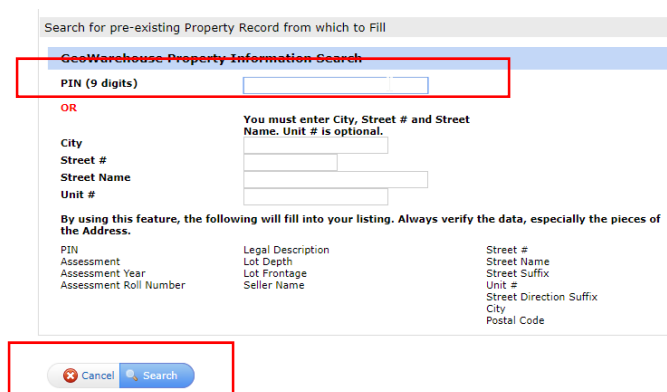
When you start a new listing, you have the option to auto-populate some of the listing information by providing the PIN number for the property.

1. When you start a new listing, you must select “Fill From GeoWarehouse”



The screenshot shows a web form titled "Add a New Cross Property Listing". It has three buttons: "Fill from Cross Property", "Start with a blank Listing", and "Fill From GeoWarehouse". The "Fill From GeoWarehouse" button is highlighted with a red rectangular box. Below the buttons, there is a label "MLS® Number from which to Fill" followed by a text input field.

2. Input your 9-digit pin number and select search



The screenshot shows a search form titled "GeoWarehouse Property Information Search". It has a section for "PIN (9 digits)" with a text input field. Below this, there is a section for "City, Street #, Street Name, Unit #" with corresponding input fields. A red box highlights the "PIN (9 digits)" field. Another red box highlights the "Search" button at the bottom of the form. The form also includes a "Cancel" button and a "Search" button.

3. Once your result(s) populate you can select the property and click “Fill”
4. You can now begin inputting information into your listing

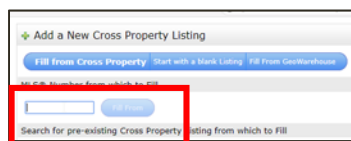


How Do I Clone a Listing in Matrix™?

When starting to input a new listing into Matrix™ you have the option to clone a pre-existing one under the same address; providing you know the original MLS® number.

Under the Input Tab, once you selected:

1. Add New
2. Select property Type
3. Input the Matrix™ MLS® listing number and select Fill from



The screenshot shows a web form titled "Add a New Cross Property Listing". It has three buttons: "Fill from Cross Property", "Start with a blank Listing", and "Fill From GeoWarehouse". The "Fill from Cross Property" button is highlighted with a red rectangular box. Below the buttons, there is a label "MLS® Number from which to Fill" followed by a text input field.

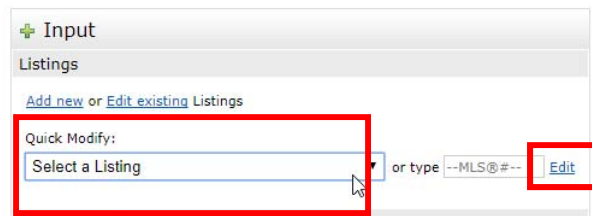
4. This will auto-populate some of the fields, though it is still your responsibility to verify the data.

How Do I Edit a Listing Already In Matrix™?

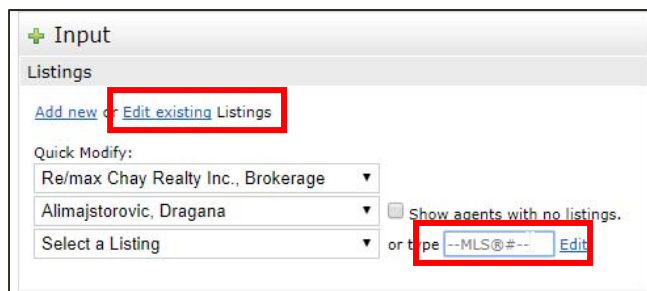
1. Log-in to Matrix™
2. Access Matrix™
3. Select the input tab



4. To edit listings already input into the MLS® System:
 - a. You can access your listings from the Quick Modify Drop-down Tab and select Edit



5. You Can Edit an existing listing by clicking the Link or Type the Matrix™ MLS® Number directly



What is a multi-family property?

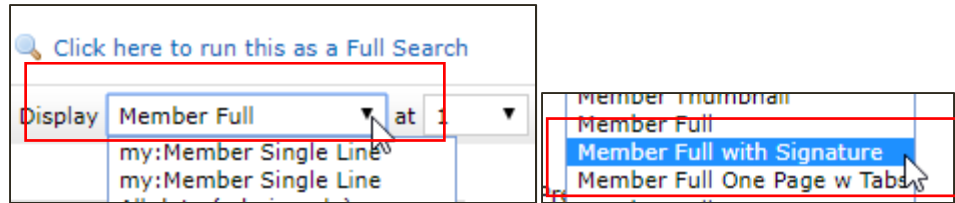
Multi-Family properties are any residential property with two (2) or more units.
I.e. Duplex, Triplex, Fourplex and so forth are to be input as Multi-Family

What is the Signature Report in Matrix™?

The Signature Report Page in Matrix™ is listed as a feature sheet in which you can print completed listing information and a space for client signature(s) is provided as well.

To access this, you must:

1. Input listing information
2. Save the listing as incomplete
3. View the listing display section – Select Member Full with Signature



4. This page will show a display/feature sheet with signature spaces at the base of it. From here you can select print and print the content for the property.

***Disclaimer:** It is recommended you input MLS® Listing information into both Matrix™ and the Stratus® MLS® System, for exposure and data integrity. Please speak with your Broker of Record and/or refer to your brokerage directly for Brokerage specific policy regarding data forms and data input.

What are “Pop-Up” Blockers?

A “Pop-Up Blocker” is a program that prevents pop-ups from displaying in your Web browser, and may cause difficulties in information appearing internet browser. To disable these, do a search for disabling pop-up blockers and find the guide for your Internet browser, such as: Chrome, Safari, Internet Explorer, FireFox, etc.

REMARKS

What do I include in the “Remarks for Clients”?

Information input here, will be visible to the public and will appear on Realtor.ca®; please refer to the information that can be input as per BDAR MLS® Rules & Regs.

As per BDAR MLS® Rules & Regulations - 2.21

“Since there are areas within the MLS® Data Input Form where the Listing Brokerage may insert its contact information, including but not limited to, an area of the form, where the Listing Brokerage may insert virtual tour information and electronic links, including urls (if any), then subject to and without limiting the generality of Section 2.03 above: 2.12

- a) *only comments which provide pertinent information concerning the property shall be permitted in the public remarks section of any MLS® Listing except for a direction to visit an unbranded link to obtain additional information; and”*

What do I include in the “Remarks for Brokerages”?

Information input here, will be visible to the public and will appear on Realtor.ca®; please refer to the information that can be input as per BDAR MLS® Rules & Regs.

As per BDAR MLS® Rules & Regulations - 2.21

“Since there are areas within the MLS® Data Input Form where the Listing Brokerage may insert its contact information, including but not limited to, an area of the form, where the Listing Brokerage may insert virtual tour information and electronic links, including urls (if any), then subject to and without limiting the generality of Section 2.03 above: 2.12

- b) only comments which provide pertinent information concerning the property, the showing of the property, the remuneration, the transaction or other factors impacting Co-operating Brokerages shall be permitted in the non-public remarks section of any MLS® Listing.

What do I include in the “Inclusions” and/or “Exclusions” section of “Comments”?

These are optional fields, for:

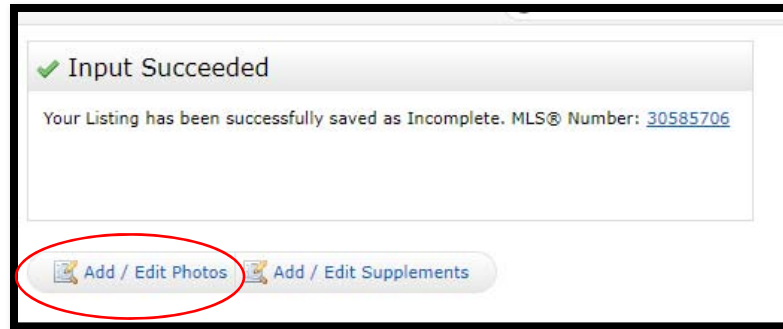
Inclusions: You may input a list of items that are included in the purchase price of the property. Example: Appliances, outdoor items, window coverings, ETC.

Exclusions: You may input a list of items that are NOT included in the purchase price of the property. Example: TV & Mounts, Bar equipment, mirrors, ETC.

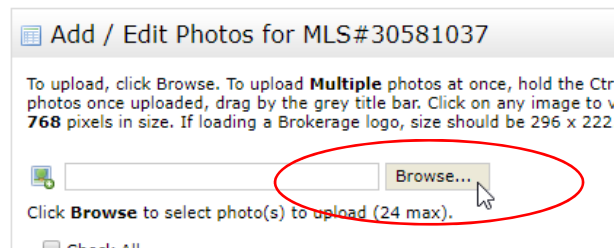
PHOTOS

How do I upload photos to my listing?

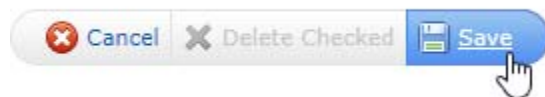
- a. After you input a new listing you can Select Add/Edit Photos



- b. Select Browse and find the image you just saved



- c. Select save at the bottom of the screen once photo is uploaded



***If the photo is marked in red in Matrix; it is warning you the quality of the image is weaker than the system recommended size, (example below):*



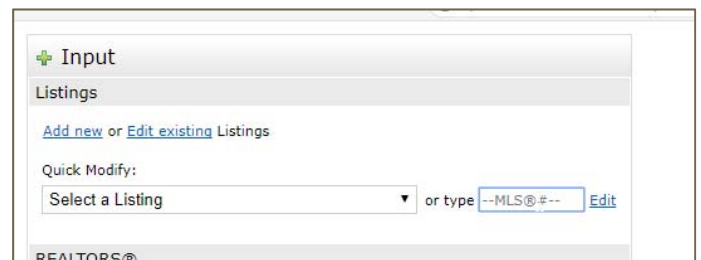
What do I do if My Photos Aren't Showing on Realtor.ca®?

Delete and re-upload the main image of the property on the Stratus MLS System. This will trigger the entire listing to be re-updated on Realtor.ca® in the next 6 to 8 hours.

REPORTING SOLD LISTINGS

How do I report a listing as SOLD on MATRIX™?

1. Select Input Tab
2. Type the MLS® you want to report as sold into to highlighted box (as shown)



3. Select the form that applies to your sold listing:

For Sold Conditional, select either “Active Continue to Show” for listings you wish to still have on Realtor.ca through the conditional period, or “Active No Show” for those that you do not want on Realtor.ca.

For Sold Firm, select “Sold Pending”. Once the sale closes, it will change to “Sold Closed”

Select Form

[Single Family Add/Edit](#)
[Price Change](#)
[Comments/Additional URLs](#)
[Open Houses](#)
[Modify Internet/DDF Options \(Association Staff only\)](#)
[Change to Active](#)
[Change to Active - Continue To Show](#)
[Change to Active - No Show](#)
[Change to Sold Pending](#)
[Change to Sold Closed](#)
[Change to Suspended](#)
[Change to Cancelled](#)
[Extend Expiry Date](#)
[Change to Expired \(Association Staff only\)](#)
[Converted Room Totals \(Association Staff only\)](#)
[Staff Information \(Association Staff only\)](#)
[Delete Listing \(Association Staff only\)](#)
[Major Correction \(Association Staff only\)](#)
[Property Type Transfer \(Association Staff only\)](#)

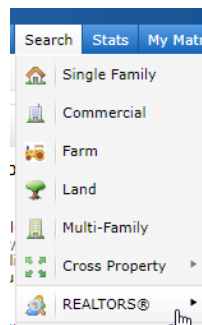
SEARCHES IN MATRIX™

How do I search in Matrix™?

Visit www.bdar.ca/matrixvideos for a video on searching.

How can I search the Member Roster to find a specific Salesperson and their Brokerage?

1. Select “Search” Tab
2. Select REALTORS®



3. Input the Realtor® information you are seeking and click search.

WEBForms®

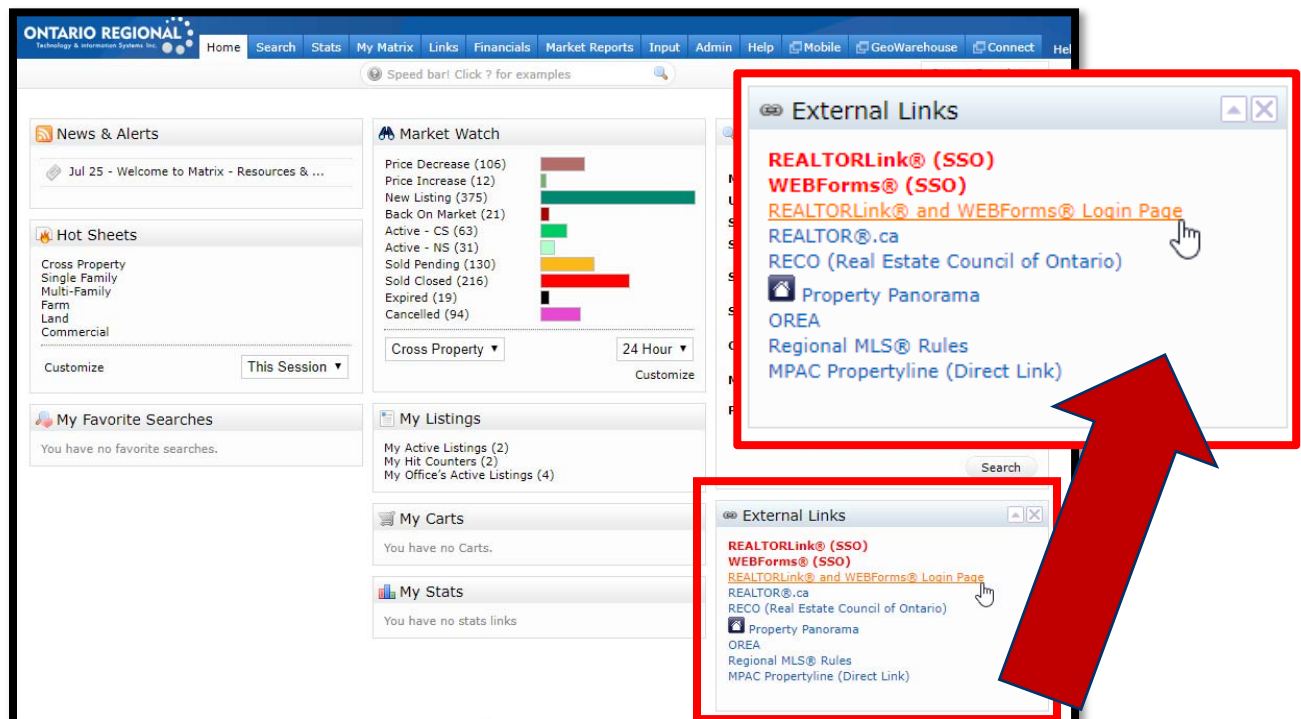
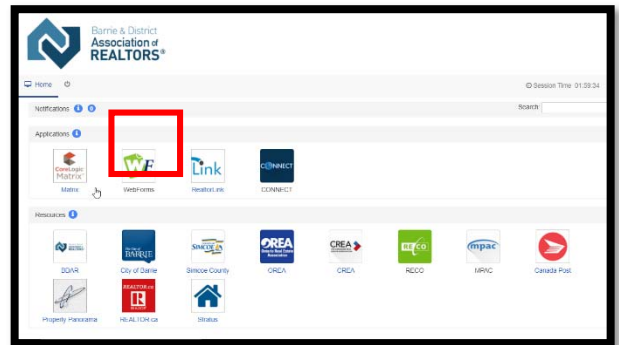
How do I access WEBForms®?

Method 1: From the SSO Dashboard

1. Log into Matrix™
2. You can access WEBForms® from the SSO Dashboard

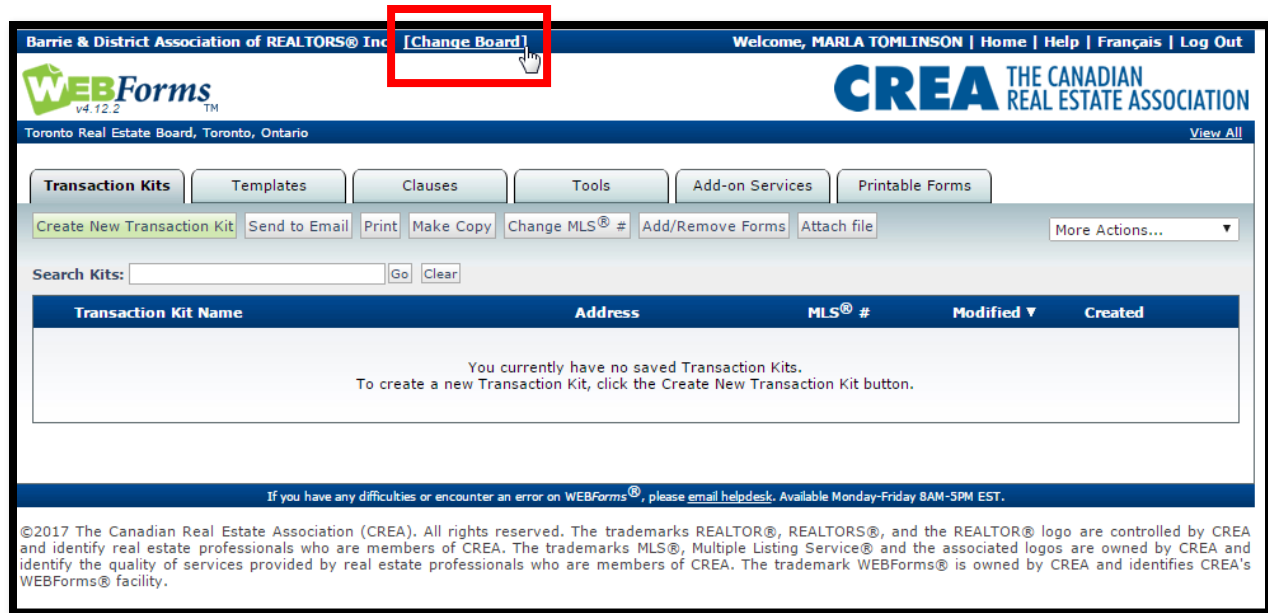
Method 2: Once already in Matrix™

1. Stay on the Home Tab in Matrix™
2. Scroll to the bottom of the page and click on "RealtorLink™ and WEBForms® Login Page"

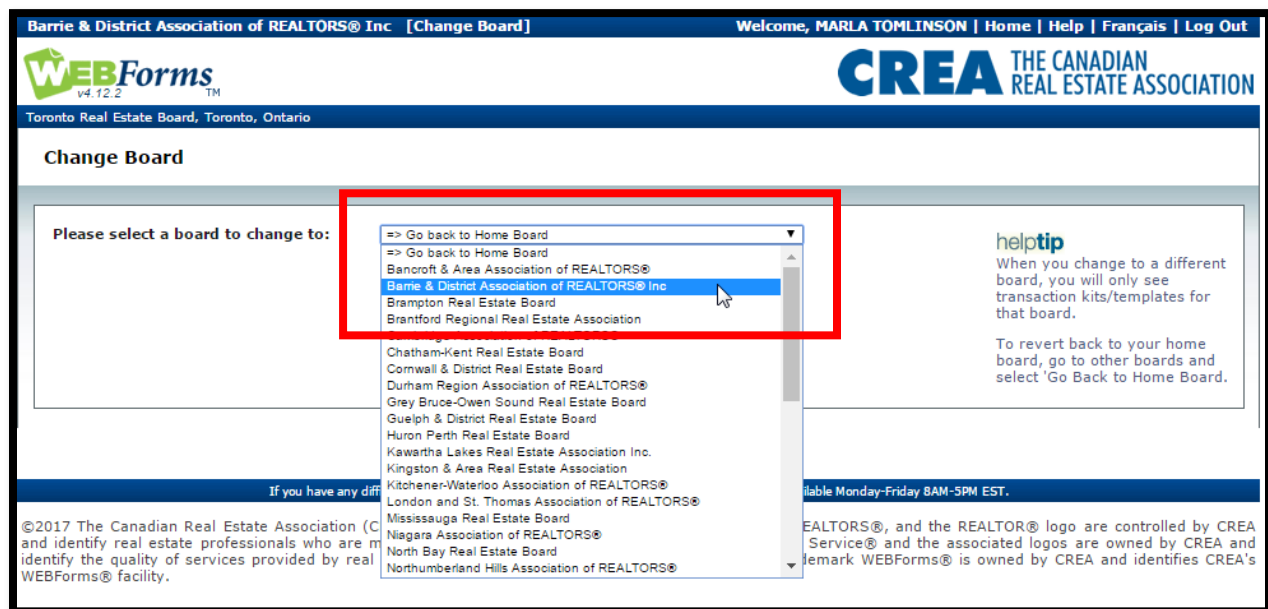


How do I view BDAR Forms on WEBForms®?

1. If you do not see BDAR information displayed, then you may have to change the Board. As shown below, click on the [Change Board] Button.



2. Select the Board of Choice, in this situation Barrie & District Association of REALTORS® Inc.




3. Select "Printable Forms" Tab
4. From the drop-down menu on this page select "View Board Forms"
 - i. Here you will find forms for both Matrix™ and Stratus®

GEOWAREHOUSE

How and where do I access GeoWarehouse? (Method 1)

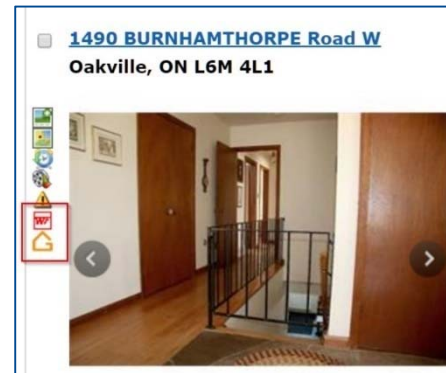
1. Log into Matrix™

- From any listing detail view, you must look for the GeoWarehouse icon , click on this and it will take you through to the GeoWarehouse information about that specific property

	MLS® #	St	PST	Address	Price Municipality (Area)	Neighbourhood	City	SqFt Beds	Baths	DOM	List Date	
	30577998	A	FRH	1490 BURNHAMTHORPE Rd W	\$29,510,000 1 - Oakville	1012 - NW Northwest	Oakville	1,500 3	2.0	126	03/23/2017	
	30579715	A	FRH	1092 ARGYLE Dr	\$16,988,000 1 - Oakville	1011 - MO Morrison	Oakville	7,889 6	7.2	45	06/12/2017	
	30562240	A	FRH	302 BURGUNDY Dr	\$12,900,000 1 - Oakville	1011 - MO Morrison	Oakville	15,036 10	5.1	133	03/16/2017	

How and where do I access GeoWarehouse? (Method 2)

Log into Matrix™ and click on the tab up top which takes the member to their dashboard for the application



CONNECT

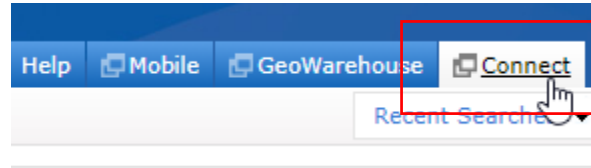
How do I access Connect? (Method 1: From the SSO Dashboard)

- Log into Matrix™
- You can access Connect from the SSO Dashboard
- Once logged into Connect, if your Board is not already set to Barrie & District Association of Realtors® (BDAR) Inc. then click Select Board and select BDAR.



How do I access Connect? (Method 2)

Log into Matrix™ and click on the tab up top which takes the member to their dashboard for the application

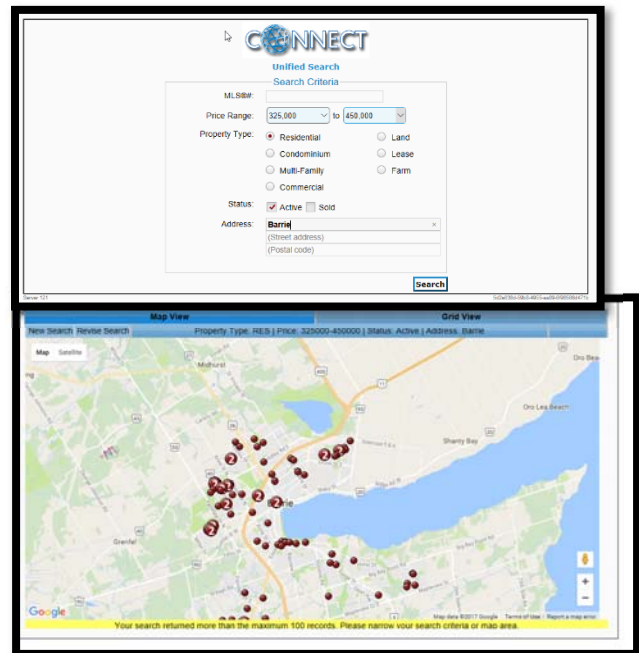


Once logged into Connect, if your Board is not already set to Barrie & District Association of Realtors® (BDAR) Inc. then click Select Board and select BDAR.

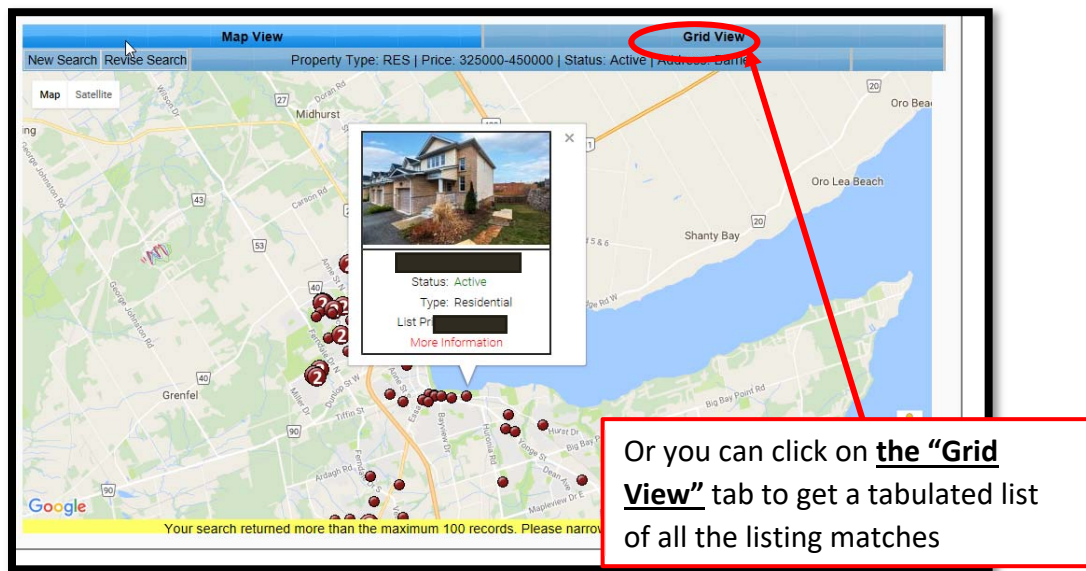
How do I search in Connect?

To search for Simcoe County and Barrie listings using Connect

1. On the next screen, enter your search criteria and click on “Search”; be sure to include the “City or Municipality” of interest.
2. The results of your search will come up as an interactive map.



3. You can click on the red dots to view the individual listings.



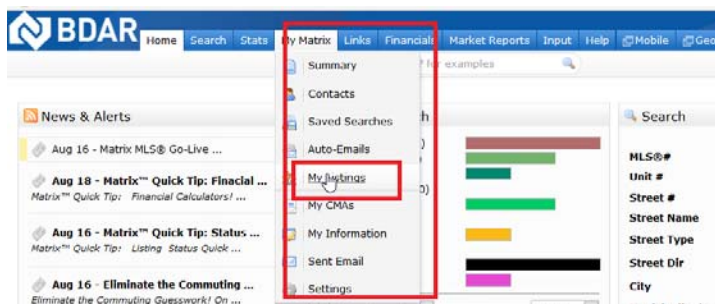
Are Branded Virtual Tours allowed on Matrix™?

Please be advised **BRANDED VIRTUAL TOURS** are **NOT PERMITTED** on the MLS® System.

This is an industry standard that is being honored. Branded tours and feature sheets are permitted only on sources external to Matrix™ (i.e. Realtor.ca®).

How do I Add a Virtual Tour?

1. Go to My Matrix, My Listings



- From the results page, select the listing you wish to add the virtual tour to, and click edit.

BDAR Home Search Stats My Matrix Links Financials

Speed bar! Click ? for

My Listings (2)

Show My Active Listings Search: -- MLS #

Previous · Next · **1-2 of 2** Checked 1 · All · None

	MLS #	St	PrTy	SubTy	Address
<input type="checkbox"/>	3058938	A	SF	FRH	2498 11 Hwy
<input checked="" type="checkbox"/>	3059216	ACS	SF	FRH	100 THRUSHWOOD Dr


[Edit](#) [Manage Photos](#) [Manage Supplements](#) [Share](#) [Reve](#)

- On the Modify Listings page, select “Comments/Additional URLs”

Modify Listing

MLS#: 30592216 100 THRUSHWOOD I

Sale



MLS #: 3059
Type/Style: Single
Category/Use: /
Municipality: BA - E
Neighbourhood: BA11
Age: 6-15
Lot Front: 27 Ft
Sellers:
L SP:
L Brkr:

Select Form

[Single Family Add/Edit](#)
[Price Change](#)
[Comments/Additional URLs](#)
[Search Houses](#)
[Change to Active](#)
[Change to Active - Continue To Show](#)
[Change to Active - No Show](#)
[Change to Sold Pending](#)
[Change to Sold Closed](#)
[Change to Suspended](#)
[Change to Cancelled](#)
[Extend Expiry Date](#)

- Scroll down until you see the “Virtual Tours URLs” field. Enter your listing’s unbranded Virtual Tour link for it to appear on Matrix and click “Submit Listing”. You can also add a branded virtual tour, but this will not appear on Matrix.

Virtual Tour URLs	
Virtual Tour URL Unbranded	<input type="text"/>
Virtual Tour URL Branded	<input type="text"/>
Virtual Tour 2 URL Unbranded	<input type="text"/>
Virtual Tour 2 URL Branded	<input type="text"/>
Additional URLs	
Additional Images URL	<input type="text"/>
Alternate Feature Sheet URL	<input type="text"/>
Map Service URL	<input type="text"/>
Sales Brochure URL	<input type="text"/>

Personal Assistants in Matrix

You have a brand-new personal assistant and want them to be able to enter and edit listings, send out emails, add contacts, set up searches and so on for you in Matrix™.

But the assistant only has some basic functions he or she can perform as themselves until they are set-up in Matrix™.

With a brand new personal assistant (PA) login they can sign into Matrix™, and some things will appear there that might look like they will work, when in fact, they don't.

When the PA first logs in, he sees the Matrix™ homepage like a regular agent. But you'll notice that those listing counts are all zero as are the Hot Sheets and Market Watch categories. No 'My Listings' counts, no carts, no recent portal visitors and no stats and favourite searches. Even the Search widget box is there as a placeholder only, because a PA can't search listings by default.

The screenshot displays the Matrix™ homepage for a user logged in as Patricia. The interface is divided into several sections, each with a title and a list of items. The counts for all items are zero, indicating that the user is a Personal Assistant (PA) and not a full agent. The sections include:

- News & Alerts:** "There are no active news postings."
- Hot Sheets:** "Cross Property", "Single Family", "Multi-Family", "Farm", "Land", "Commercial".
- My Favorite Searches:** "You have no favorite searches."
- Market Watch:** "Price Decrease (0)", "Price Increase (0)", "New Listing (0)", "Back On Market (0)", "Active - CS (0)", "Active - NS (0)", "Sold Pending (0)", "Sold Closed (0)", "Expired (0)", "Cancelled (0)".
- My Listings:** "You have no listing links."
- My Carts:** "You have no Carts."
- My Stats:** "You have no stats links."
- Search:** "MLS#", "Unit #", "Street #", "Street Name", "Street Type", "Street Dir", "City", "Municipality/Area", "Postal Code".
- Recent Portal Visitors:** "You have no recent portal visitors."
- Recent Use Contacts:** "You have no recent use contacts."
- External Links:** "REALTORlink® (SSO)", "WEBForms® (SSO)", "REALTORlink® and WEBForms® Login Page", "REALTORlink®", "RECO (Real Estate Council of Ontario)", "OREA", "Regional MLS® Rules", "ShowingTime - configure", "MPAC Propertyline (Direct Link)".
- Additional:** "There are no additional widgets."

Down in the right-hand corner, you see an External Links widget, which will work to give you a new browser tab with the link shown if it's not a 'SmartLink'. A SmartLink like WEBForms® (SSO) will take you to the WEBForms® site and automatically log you in as a realtor, if you are Realtor®.



But PA's aren't realtors, so all they get from this SmartLink and the REALTORLink® (SSO) SmartLink is the Matrix error page.



We're sorry, your request could not be processed at this time.

Please click the **Back** button in your browser and try again later.
If you'd like, click here to go the [Home](#) page.

If this problem persists, try closing your browser and logging back into Matrix.

When logged in as a PA login (not impersonating/sharing identity with a Realtor®), you can only search against the realtor or office tables.

Basic Rltr search works as PA login.

Basic Search

ID

CREA ID

Brokerage ID

Last Name

First Name

Brokerage Name

Direct Work Phone

Cell Phone

Email

Web Page

Status

☒ Active

☐ Inactive

☐ Suspended

☐ Terminated

Home Board

Brantford Regional Real Estate Associati

Cambridge Association of REALTORS®

Guelph & District Association of REALTO

Kitchener-Waterloo Association of REAL

Niagara Association of REALTORS®

Oakville, Milton and District Real Estate

REALTORS® Association of Hamilton-Bt

Simcoe and District Real Estate Board

☐ Or ☐ Not

Source Membership System

☐ Brantford

☐ Cambridge

☐ Guelph & District

☐ Hamilton - Burlington

☐ Kitchener - Waterloo

☐ Niagara

☐ Oakville

☐ Simcoe

☐ ORTIS

Clear 11 matches Results

Other things that appear to be there and could be used are Market Reports, but clicking on the tab gives you the option to use the agent level report which returns no counts.

The PA login can use settings to fill in their personal information, create headers and footers for pages they can never populate and so on. So really what is necessary as the next step for the personal assistant login is for their realtor to set them up on their side of Matrix™.

The Realtor® will need to use the Team function in Matrix™ to set up their personal assistant. (See Page 28 for Details).

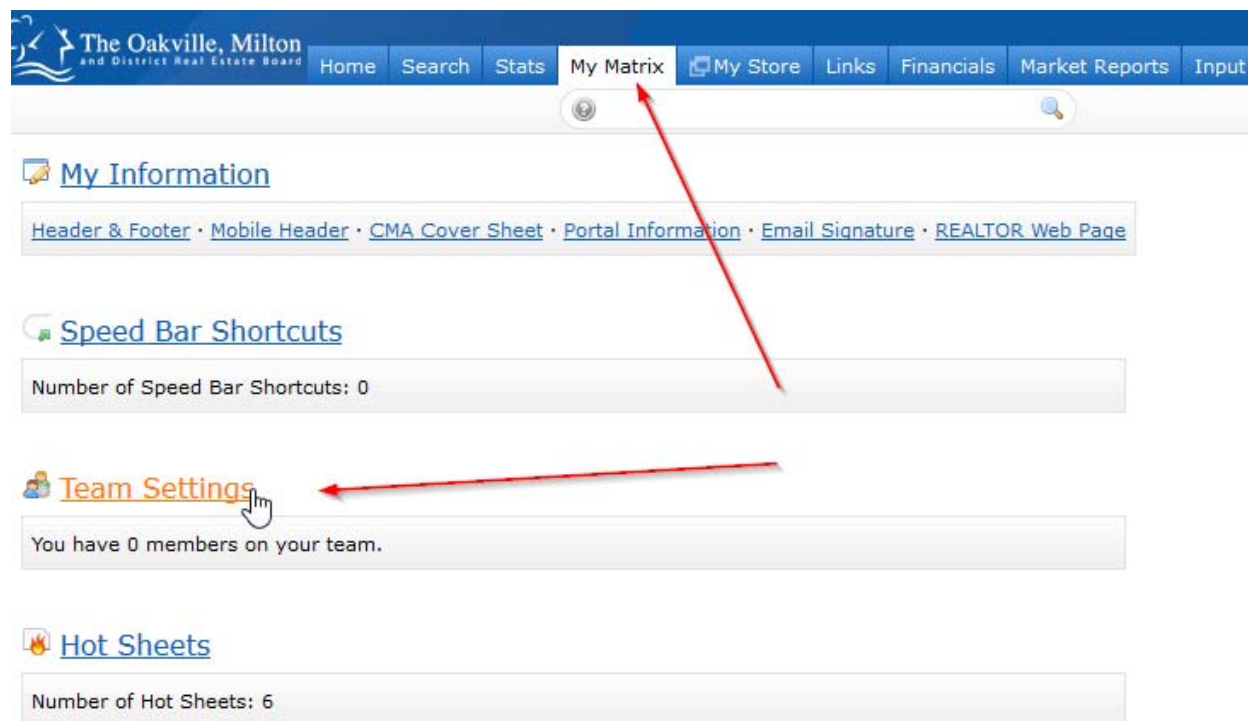
Assistants in Matrix

Brokerage and Office Assistants in Matrix

You have an assistant and want them to be able to enter and edit listings, send out emails, add contacts, set up searches and so on for your office or brokerage in Matrix™.

But the assistant only has some basic functions he or she can perform as themselves until they are set-up in Matrix™.

And by setup in Matrix™, the agents that want the assistant to impersonate them or work on behalf of them will need to set them up in their My Matrix>Setting>Team Settings page as part of their team. After clicking on the My Matrix tab at the top, they then click on the Settings option shown below that and see a screen like the screenshot below. They can then click on Team Settings.

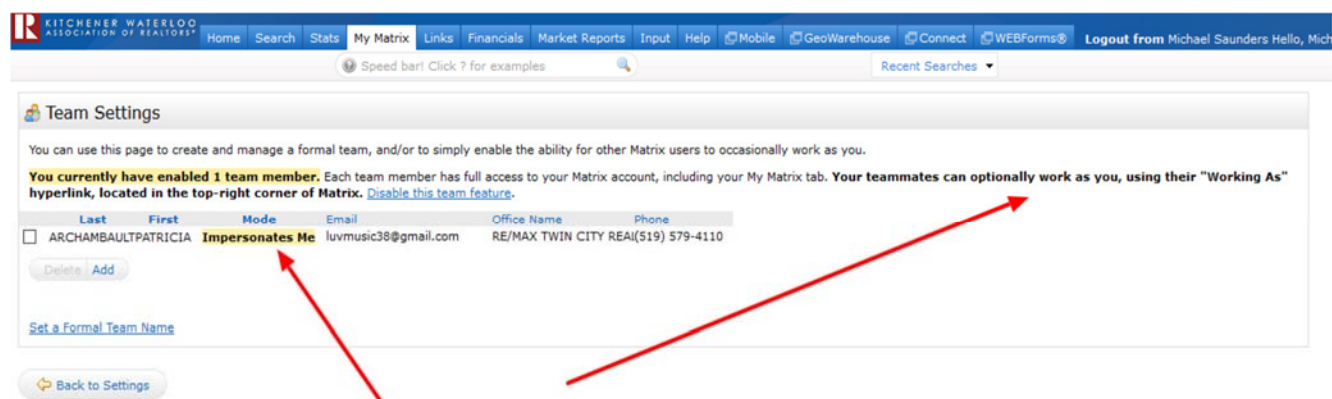


The Brokerage and Office Level assistant logins can be setup to work as single realtors/brokers or to work as a team that have been named and setup by a higher login. There is really no point in setting up a team on an assistant login as all they could do would be to give the same reduced functionality as they have by default.

The Realtor® will need to use the Team function in Matrix™ to set up their personal assistant.

Teams in Matrix

The Matrix™ Teams functionality makes it possible to add other agents to a team, and makes it possible for another agent to add you to their team.



Agents (or their assistants) may **work on behalf** of an agent or even **impersonate** another agent.

Matrix™ will only allow you to add others to your team who have an **Active Matrix ID** on the system.

Impersonate an Agent

If the agent you work with added you to their team in Matrix™ and set you up to **impersonate** them, you would be able to do the following things:

- Emails sent from Matrix™ would be sent from their name and email address, and would use their email banner and footer (if they had chosen one) and email signature.
- Print reports – any reports that are printed while impersonating an agent will have the information of the agent being impersonated in the “Courtesy of” information. In other words, the report will look as if it were printed by the agent that you’re impersonating.
- Access another agent’s Matrix™ Contacts, Saved Searches (you cannot change their team settings) When you send an email from Matrix™ while you are impersonating an agent, the name and email address in the “From” line will be highlighted in yellow. This is to call attention to the fact that you are sending that email as that agent. This means that to the client, the email will look **exactly** as if it came from the agent being impersonated.

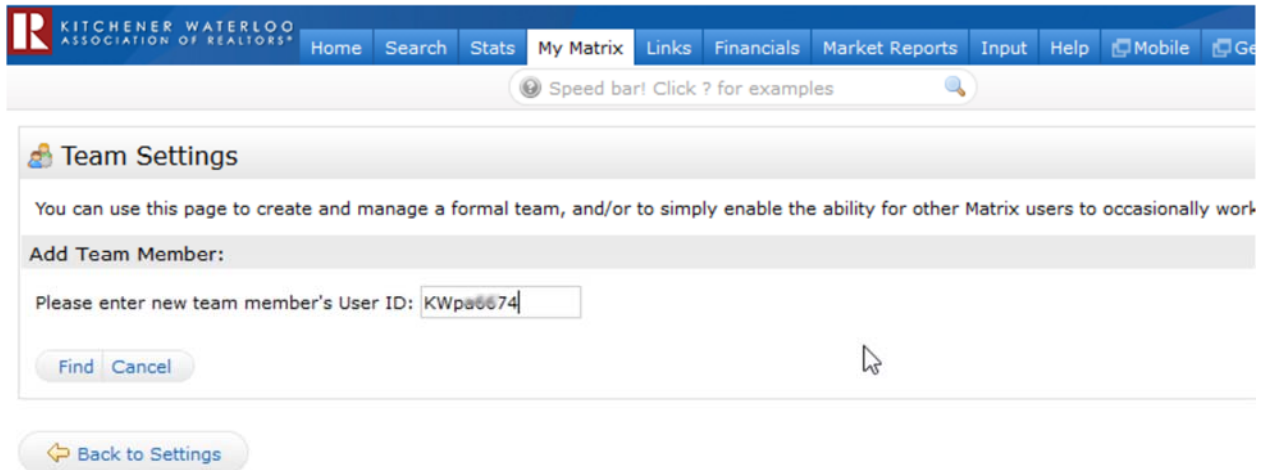
Working on Behalf of An Agent

If an agent you work with added you to their team in Matrix and set you up to **work on behalf** of them, you would be able to do the following things while working on behalf of them in Matrix:

- Emails sent from Matrix™ would be sent from your name and email address on their behalf, and would use your email banner and footer (if you have chosen one) and email signature.
- Print reports - any reports that you print while working on behalf of another agent will indicate that they were printed by you on behalf of the other agent.
- Access their Matrix™ Contacts, Saved Searches (you cannot change their team settings)

How to set up a team (Realtor side of setup)

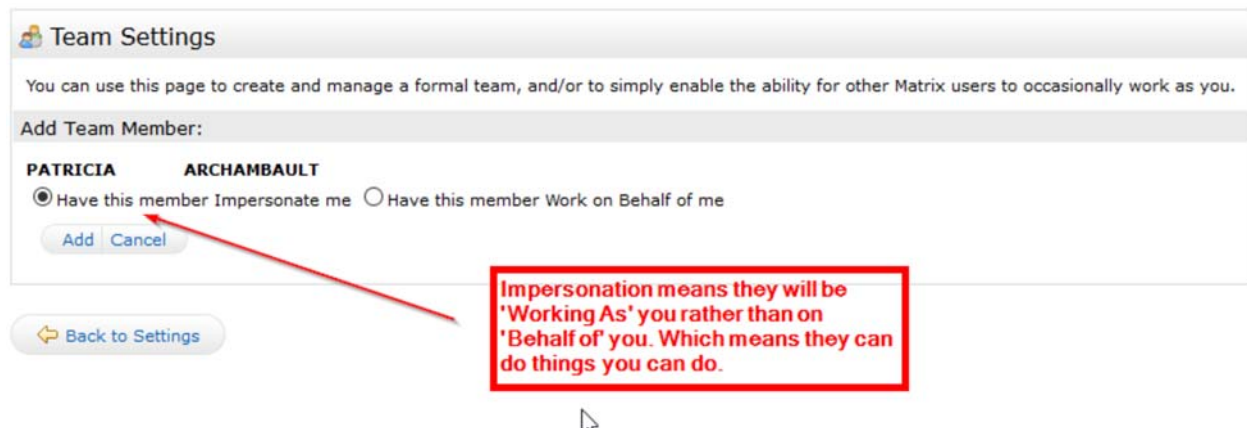
Click the My Matrix Tab, then the “Settings” link. At the bottom of the My Settings screen, you will find the Team Settings section. Click the link labelled “Click here to create a Team” and then again on the next screen.



The screenshot shows the 'Team Settings' page within the 'My Matrix' tab of the Kitchen Waterlo Association of Realtors' system. The page has a blue header with navigation links: Home, Search, Stats, My Matrix (selected), Links, Financials, Market Reports, Input, Help, Mobile, and Ge. Below the header is a search bar with the text 'Speed bar! Click ? for examples'. The main content area is titled 'Team Settings' and includes a sub-header: 'You can use this page to create and manage a formal team, and/or to simply enable the ability for other Matrix users to occasionally work'. Underneath, there is a section 'Add Team Member:' with a text input field labeled 'Please enter new team member's User ID:' containing the text 'KWps6674'. Below the input field are 'Find' and 'Cancel' buttons. At the bottom of the section is a 'Back to Settings' button with a left-pointing arrow.

Type in the agent ID for the agent you want to add to your team. If you do not know the ID, you can find it through an Agent Roster search (Roster tab).

Select whether you want this colleague to Impersonate you or Work on Behalf of you. Click the “Add” button.



This screenshot shows the 'Add Team Member' section of the 'Team Settings' page. It displays the name 'PATRICIA ARCHAMBAULT' and two radio button options: 'Have this member Impersonate me' (which is selected) and 'Have this member Work on Behalf of me'. Below these options are 'Add' and 'Cancel' buttons. A red arrow points from a red-bordered callout box to the 'Add' button. The callout box contains the text: 'Impersonation means they will be "Working As" you rather than on "Behalf of" you. Which means they can do things you can do.' At the bottom of the section is a 'Back to Settings' button with a left-pointing arrow.

After adding your first team member, you will come to the main Team Settings screen.

Team Settings

You can use this page to create and manage a formal team, and/or to simply enable the ability for other Matrix users to occasionally work as you.

You currently have enabled 2 team members. Each team member has full access to your Matrix account, including your My Matrix tab. **Your team name is currently set to "RE/MAX TWIN CITY REALTY".** **Your team description is currently set to "RE/MAX TWIN CITY REALTY".** **Your team color is currently set to "#000000".** **Your team icon is currently set to "RE/MAX TWIN CITY REALTY".** **Your team hyperlink, located in the top-right corner of Matrix.** [Disable this team feature.](#)

Last	First	Mode	Email	Office Name	Phone
<input type="checkbox"/>	ARCHAMBAULTPATRICIA	Works on Behalf of Me	luvmusic38@gmail.com	RE/MAX TWIN CITY REALTY	(519) 579-4110
<input type="checkbox"/>	URWIN	Impersonates Me	jill.urwin@gmail.com	RE/MAX TWIN CITY REALTY	(519) 579-4110

[Delete](#) [Add](#)

My team name (optional):

☒ I Impersonate this Team ☐ I Work on Behalf of this Team

☒ Allow Team Members the option of switching between their own names and the Team Name when printing and emailing to Team Contacts.

[Save](#)

[Back to Settings](#)

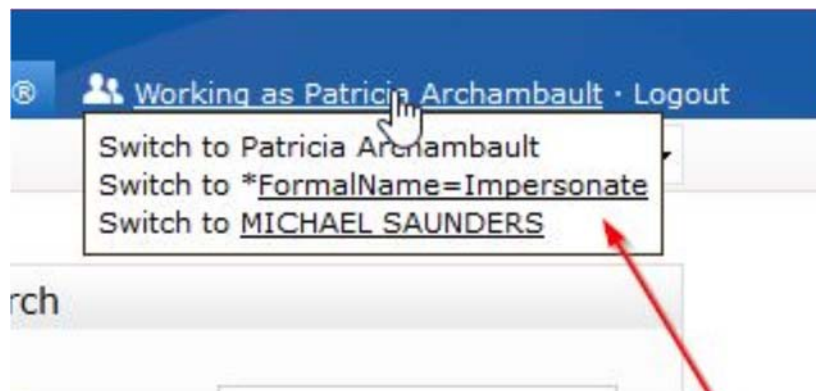
- Add additional team members (click the link “Click here to add a team member and/or someone that can work as you.”)
- Delete team members or edit their impersonate/work on behalf status.
- Name your team (optional). Be sure to click the “Save” button after typing in your name.
- Set yourself up to either impersonate or work on behalf of the team.
- Allow team members the option of switching between their own names and the Team name when printing and emailing to Team Contacts. Be sure to click the “Save” button after checking or unchecking this box.
- Disable the team function.

After enabling the Team function, you will be alerted to it on the **Home page each time you log in**: A link is included to go straight to the Team Settings screen.



When one of your team members logs in, they can switch from their own individual login to the Team login by clicking on their name in the **upper right corner** of the screen to open the select popup. There they can click to select the team name (or your name if you did not create a team name).

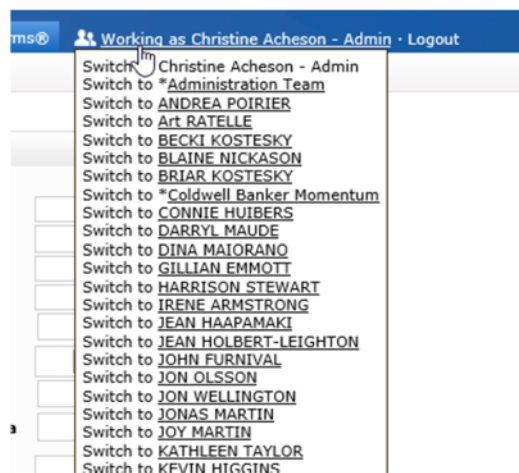
They can now see in the **upper right (and highlighted in yellow on the Home page)** that they are working as the team. When they click on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to your (the Team's) items. When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone:



If they are set to impersonate you, they have the same choice except that if they select the Team, it will use your email address, not theirs.

For assistants for brokerages and offices, the working as link allows them to impersonate any agent that gives them access.

You can see in the following screenshot that a BA or OF can actually be on more than one team or be allowed to work as more than one realtor. Teams are shown with a star before the team name.

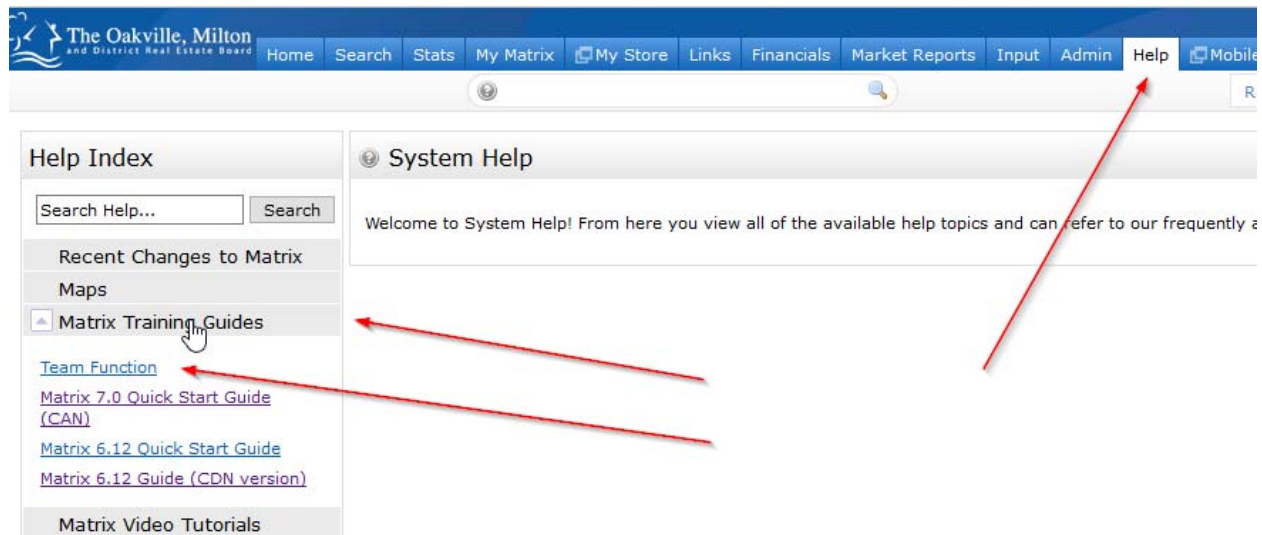


The best place to access the working as link is from the homepage, unfortunately it doesn't work in all tabs such as the settings tab.

To leave working as the team and go back to working as yourself, click the "Working as" link in the upper right of the screen and click to select your own name which is the first option in the drop-down list of names and the only one that is not underlined.

Once you've clicked on that link, you will no longer be impersonating anyone else and your access and permissions will revert to the assistant login level you started with.

Help on teams and other functionality in Matrix can always be found in the help menu tab under Matrix™ Training Guides.



How do I create an auto-email?

Visit <https://www.bdar.ca/MatrixVideos> to view a video on this topic.

What is a Client Portal?

Visit <https://www.bdar.ca/MatrixVideos> to view a video on this topic.

How do I find Statistics in Matrix™?

Visit <https://www.bdar.ca/MatrixVideos> to view a video on this topic.

Where do I find Hot Sheets, and how do I use them?

Visit <https://www.bdar.ca/MatrixVideos> to view a video on this topic.

How are Days on Market (DOM) Calculated?

On market status will increment the value of DOM, while off market status will not add to total DOM.

Where can I Find Help & Information?

Visit www.bdar.ca/Matrix for more information.



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