

# Top 10 Things You Need to Know for Matrix™

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Matrix™ works differently than Fusion in some functions. Below is a list of the Top 6 items you need to know when working with Matrix™.

## 1. Search Operators

### a. Wild Cards

The Matrix™ Search tab offers a variety of customizable search screens to provide multiple templates for different search needs. While conducting a search using open-text fields, remember to use the Wild Cards to get the exact results you are looking for.

### b. Speed Bar

The Speed Bar allows you to quickly search for listings using abbreviations and shortcuts. Criteria can be entered directly into the Speed Bar, or changed after running a search to narrow your results. You can also save your Speed Bar search as a Shortcut to use again in the future.

## 2. Recent Searches

The Recent Searches feature, a drop-down menu always located to the right of the Speed Bar, is at the top of every screen that allows you to return to a previous search. If the search was run during your current login session to Matrix™, your selected listings will still be checked, in the display view you were using when you left the screen.

*Important:* This feature displays your search results at the time the previous search was run. If changes such as Status or List Price have been made since the Recent Search was ran, or new listings match your search criteria, these will not be reflected in the Results.

## 3. Saved Searches vs. Auto Email

In Fusion, all searches were located under the Save Search Manager. In Matrix™, the searches are divided into Saved Searches (searches saved not set up to notify anyone), and Auto-Emails that notify your clients of new information, Automatically or Concierge mode.

a. The Saved Searches feature offered on your search results screen allows you to quickly re-run your saved criteria and find current results. A Saved Search does not have to be attached to a Contact. No notifications will be sent.

b. The Auto Email feature will offer the same feature as a Saved Search, by allowing you to quickly re-run the search. Auto Email must be attached to a Contact. It will notify your client to new listings that match the saved criteria.

## 4. Hot Sheet

The Hot Sheet search provides you with the “changes” in your market niche since you last looked at it. Unlike Fusion, this does not default to a Days Back search. You must add the Days Back information as part of the search criteria if you want it to be a Today’s Hot Sheet.

*Benefit:* Fusion would run the Hot Sheet beginning at midnight of the day you are running the

search. With Matrix™ the Hot Sheet is ran back to the last time you ran the search.

## 5. **Portal Updates**

In Fusion, you had the option to re-send a listing to a Contact if there was a Price or Status Change, or when the Listing Agent added the first Photo. Matrix™ doesn't re-send property listings when updated. While the information is only displayed on the Portal, new changes are highlighted.

- a. You can't email a report. All listing information is communicated through the Portal.
- b. All emails sent to your contact will be available on the Portal.
- c. CMA reports, Driving Directions, Statistical reports and System PDFs associated with your contact are available on the Portal as well.
- d. Consumer friendly search tool that includes a Search by Map.

## 6. **My Matrix™ /Setting**

### a. *Portal Greeting*

The Portal Greeting allows you to edit a greeting message that will show on the Home Page of your Contacts' Portal. This message will appear for each of your Contacts. You can add a photo, change the greeting, and run spell check on your text.

### b. *Portal Information*

You can select what information displays and in what order, on the Information section of your Client's Portal. Each drop-down menu contains the list of contact information from your Information tab. No modifications can be made on this page. If you wish to make a modification, you will need to go back to the Information tab, make the change, click Save, and return to the Portal Information tab to add it.

### c. *Email Signature*

Type in the text information you wish to be displayed at the bottom of all email communication from Matrix™. Click the Check Spelling link for spellcheck.