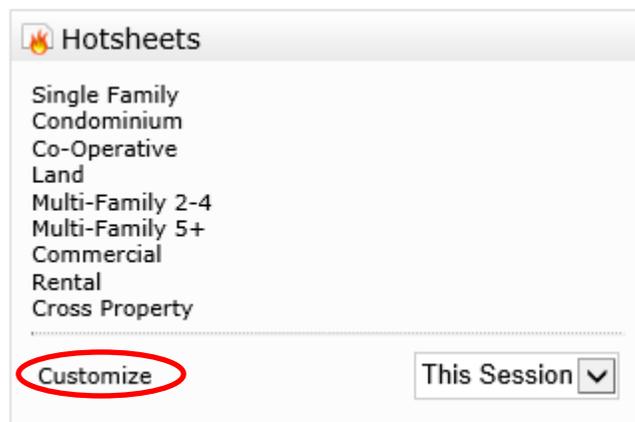


## Contents:

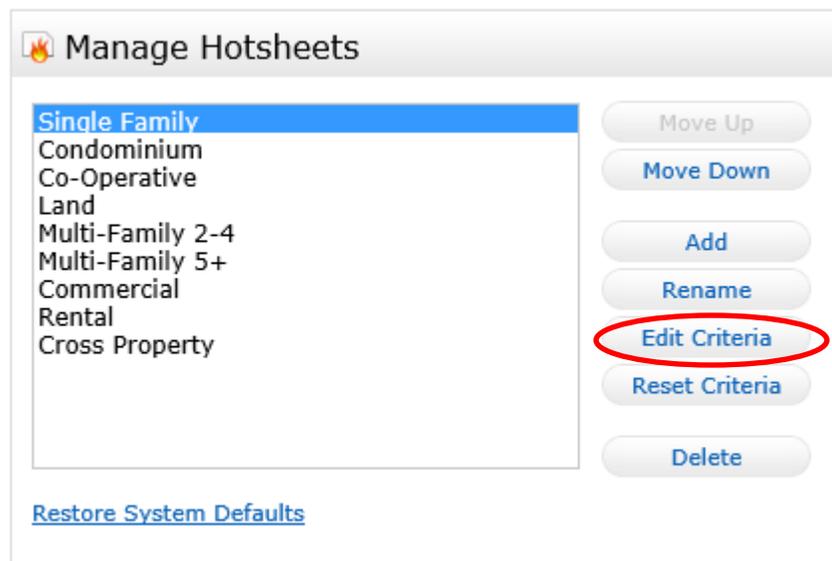
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## Hotsheets

Hotsheets on the homepage can be customized to the users preferred area. To Customize click CUSTOMIZE in the bottom corner of the hotsheet widget.



Highlight the Hotsheet you want to Customize and click EDIT CRITERIA.



On the search screen, enter the criteria you'd like your hotsheet to use (for example- choose your primary county, counties, or city/towns) and click SAVE at the bottom of the screen.

*Note- Each Property Type Hotsheet must be customized one at a time.*

## Custom Hotsheets

In addition to the Property Type Hotsheets which have been pre-created for you in the Matrix system, each user can create an additional 25 custom hotsheets. To create additional hotsheets click on ADD. Select the type of hotsheet you want to create and give it a name. Then follow the previous instructions on customizing the hotsheet.

**Manage Hotsheets**

- Single Family
- Condominium
- Co-Operative
- Land
- Multi-Family 2-4
- Multi-Family 5+
- Commercial
- Rental
- Cross Property

Buttons: Move Up, Move Down, **Add**, Rename, Edit Criteria, Reset Criteria, Delete

[Restore System Defaults](#)

## Auto-Emails

To set up a new Auto Email, start by going into a search and entering the criteria of what the client is looking for. Go to RESULTS and click SAVE and NEW AUTO EMAIL.

Previous · Next · 1-7 of 7      Checked 0      All · None · Page

<input type="checkbox"/>	Listing #	S	Address	Post Office	List/Sell \$	BD BA
<input type="checkbox"/>	<a href="#">4403162</a>	A	17 Karlson Lake Road	Brewster	\$225,000	4 2 (2 0)
<input type="checkbox"/>	<a href="#">4404928</a>	A	67 Lake Drive	Mahopac	\$399,900	3 2 (2 0)
<input type="checkbox"/>	<a href="#">4404521</a>	A	28 Wainwright Drive	Carmel	\$400,000	3 3 (2 1)
<input type="checkbox"/>	<a href="#">4411463</a>	A	3 Westgate	Carmel	\$495,000	3 4 (4 0)
<input type="checkbox"/>	<a href="#">4412512</a>	A	1925 Albany Post Road	Garrison	\$610,000	3 2 (2 0)
<input type="checkbox"/>	<a href="#">4415263</a>	A	53 Philipse Brook Road	Garrison	\$629,000	4 2 (2 0)
<input type="checkbox"/>	<a href="#">4409581</a>	A	178 West Shore Drive	Putnam Valley	\$749,000	3 3 (3 0)

Actions   Refine   **Save**   Carts

[New Saved Search](#)   **New Auto Email**   [New Speed Bar Shortcut](#)

**Recipients**

Contact:  [Create a New Contact](#)

To:

BCC me a copy of all emails

Subject:

Message:

Check Spelling [English](#)

Select which contact should receive the auto email, enter a subject and under SCHEDULE choose either ASAP, DAILY, or MONTHLY. Click SAVE

## Concierge

The Concierge mode allows you to turn on the Auto Email for your client but have the new matches sent to you for approval. Those listings which are approved will be sent to the client, and those that are rejected by you will not. To turn on the Concierge feature- follow the previous steps to set up an Auto Email- but- instead of choosing one of the SCHEDULE options, check the ENABLE CONCIERGE MODE box under SETTINGS.

**Settings**

Concierge:  Enable concierge mode

Display: All customer displays are automatically available to your contact. [Additional](#) >>

Show this contact in Reverse Prospecting results

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

---

**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 type="checkbox"/> All PM	<input type="checkbox"/> PM						

[Clear](#)

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

At the bottom of the page click SAVE AND GO TO APPROVALS. This will bring you to a list of the results that currently match your search criteria. Choose which listings you want the client to receive by checking the listings and clicking APPROVE at the bottom.

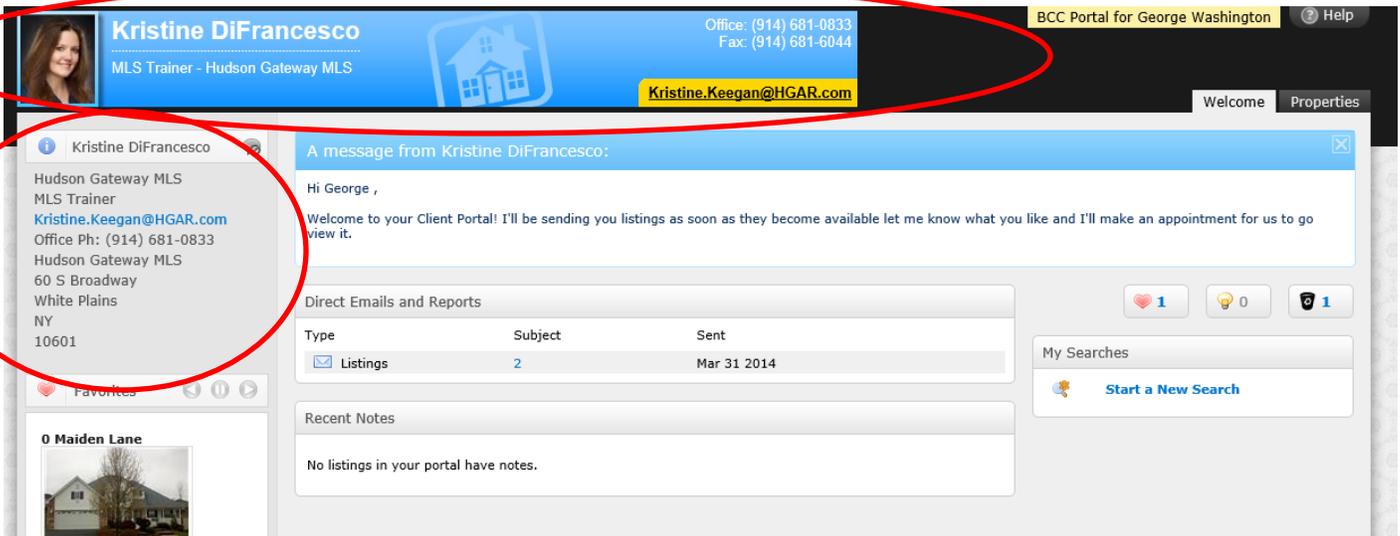
## Portal

Any time a listing is emailed or sent on an auto-email to a contact- it is sent to them in their Portal. A portal is a private webpage which allows you to communicate back and forth with your contact, showing them all the properties they might be interested in and allowing them to provide feedback. Every contact you enter into Matrix has their own Portal page (nothing you need to do to create it). Just be sure all of your contacts are saved in Matrix and every time you email the contact a listing, a link is provided in the email for them to access their portal.

To preview what the Portal looks like for any contact- go to MY MATRIX- CONTACTS- Click on the name of a contact, and click OPEN PORTAL.

*TIP: Contacts can view a short video tutorial on how to use the Portal by clicking HELP in the top right corner of their Portal.*

# Portal (cont.)

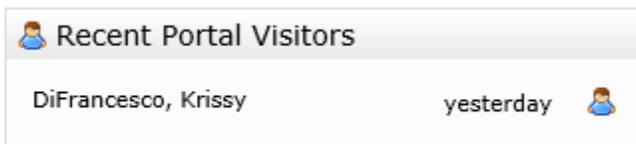


The Portal Header (top) and Portal Contact Information (left side) can be customized by going to: MY MATRIX- MY INFORMATION- HEADER AND FOOTER and PORTAL INFORMATION.

While in their portal, contacts can view listings, mark them as favorites, possibilities, write notes or discard listings. They can also create their own searches and save them. All activity on the clients portal is displayed in MY MATRIX- CONTACTS.

<input type="checkbox"/>	Name	Email	Category	My Last Use	Last Portal Visit	<input type="checkbox"/>					
<input type="checkbox"/>	Aniston Jennifer	kristine.difrancesco@hgar.com		3 0 05/14/2011	04/05/2014	0	0	0	0	0	6
<input type="checkbox"/>	Clooney George	kkeegan@ghvmls.com		0 2 01/01/2000	never	0	0	0	0	0	0

Recent Portal visitors are also shown on a widget on your Matrix homepage.



Training Questions?  
 Email Kristine DiFrancesco  
 MLSTraining@HGAR.com

## Realist Labels

Realist Tax can be accessed by clicking on the REALIST TAX tab on the top navigation toolbar in Matrix. In Realist, you can search for one tax record using the QUICK SEARCH or multiple tax records using the MY SEARCH.

When searching for a bunch of tax records to create mailing labels use the MY SEARCH. Enter the criteria – for example city and street name- and click SEARCH (bottom left).

The screenshot displays the Realist Tax search interface. On the left, a sidebar contains search filters. The 'My Search' tab is selected and circled in blue. The filters include: City (is, cornwall), Street Name (starts with, main), City/Town (is, Select From List), Village (starts with), Zip Code Property (is), Sale Price (is between), Recording Date (is between), Settle Date (is between), Universal Land Use (is, Select From List), Total Units (is between), and Year Built (is between). The 'SEARCH' button is circled in blue. The main area shows a map of the Pocono Mountains region. Below the map are buttons for 'Print Grid/Map' and 'Email Grid/Map'. A table with columns 'Address', 'City/Town', 'School Dist', and 'Owner Name' is visible below the map. At the bottom, there are buttons for 'View Reports', 'Print/Email Property Detail', 'Create Labels', and 'Export'.

Once your results have populated in the grid on the right, click CREATE LABELS (bottom right) to generate your mailing labels.