



PILLAR 9™
TECHNOLOGIES

Data Portal Orientation Training



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Introduction to Data Co-op powered by the Pillar 9™ Data Portal

Welcome to the AREA Data Co-op powered by the Pillar 9™ Data Portal. This Data Co-op solution AREA members with access to a read-only database of listings from around the province in a single system. This Data Co-op portal provides a new tool that features an innovative criteria and map-based search interface, providing efficient access to listing data from the two primary MLS® Systems currently operating in Alberta.

This new Data Co-op powered by the Pillar 9™ Data Portal provides 100% of MLS® system listings, updated daily. The Data Co-op Data Portal gives you the ability to tap into the listing data you need to provide clients with full access to potential listings; and the information required to complete comparative market analysis, generate listing reports, and have insight into the entire real estate market in Alberta.

The following training guide will enable you to:

- Describe Matrix™ functionality and the purpose of each widget on the Home screen
- Update your personal information
- Perform a property search
- Save and customize your searches
- Use system functionality to monitor housing market
- Create auto emails to send new listings to your clients and monitor their activity for your listings

Pillar 9™ Data Portal Home Page

Email: datacoop@albertarealtor.ca

Home My Matrix Search Stats Roster Links Mobile Help

2

1

News & Alerts

- Apr 20 - Matrix Maintenance ...**
CoreLogic will be performing standard ...
- Apr 21 - Improve your efficiency on ...**
Did you know that the Prospects CRM Mobile ...
- Apr 13 - System Update: April 20, 2022**
System updates are coming to the Matrix™ ...
- Mar 31 - Try the NEW Cloud CMA today!**
The Cloud CMA tool will help you create the ...

3

Hot Sheets

- Residential
- Agri-Business
- Land
- Mobile
- Multi-Family
- Rental
- Commercial
- Cross Property

Customize
This Session ▼

7

My Favorite Searches

You have no favorite searches.

4

Market Watch

New Listing (44)	<div style="width: 100%; height: 10px; background-color: green;"></div>
Back On Market (7)	<div style="width: 20%; height: 10px; background-color: orange;"></div>
Price Decrease (25)	<div style="width: 60%; height: 10px; background-color: red;"></div>
Price Increase (1)	<div style="width: 5%; height: 10px; background-color: green;"></div>
Pending (40)	<div style="width: 80%; height: 10px; background-color: orange;"></div>
Sold (27)	<div style="width: 70%; height: 10px; background-color: red;"></div>
Leased (0)	<div style="width: 0%; height: 10px; background-color: blue;"></div>
Expired (7)	<div style="width: 10%; height: 10px; background-color: purple;"></div>
Withdrawn (0)	<div style="width: 0%; height: 10px; background-color: grey;"></div>
Terminated (6)	<div style="width: 10%; height: 10px; background-color: teal;"></div>

Residential ▼
Today ▼

Refresh
Customize

6

My Listings

You have no listing links.

Refresh

8

My Carts

You have no Carts.

All Carts

9

My Stats

You have no stats links

5

Search

MLS@#:

Unit #:

Street #:

Street Name:

Street Type:

Street Dir:

County:

City:

Postal Code:

Show On Market Listings Only

11

Recent Portal Visitors

You have no recent portal visitors.

10

Recent Use Contacts

You have no recent use contacts.

12

Contact Requests

You have no contact requests.

Additional

There are no additional widgets.

A Brief Overview

1. **News and Alerts** is where you can see recent news and alerts. Important items are represented by an exclamation mark icon.
2. **Speed Bar**. Looking to quickly create a simple search or change your current criteria on-the-fly? Use a combination of system, or custom, Speed Bar shortcuts to find results fast. The Matrix Speed Bar's increased width now has the ability to display more shortcuts.
3. **Hot Sheets** are customizable reports of new and recent activity on the MLS® System. It will show you market statistics based on different criteria.
4. **Market Watch** provides a quick preview of activity on the MLS® System over a defined period. This the section that will show you current market statistics, such price increase and decrease, sold houses.
5. **Search** section will allow you to do a quick property search by using various criteria such as MLS® number or address details.
6. **My Listings** allow you to quickly view your personal or office listing activity. Go through “my listings” types. Open “my active listing” and see how many agents sent your listing to clients in “sent”; view how many people viewed the email and if any properties are marked as favourites.
7. **My Favourite Searches** allow you to save your commonly used searches. Maximum 10 searches.
8. **My Cart** allows you to save listing and associate it with a client, while working on other searches.
9. **My Stats** will allow you to run your saved pre-set chart stats.
10. **Recent Use Contacts** allow you to quickly access your recent contacts' information.
11. **Recent Portal Visitors** provides a quick snapshot of your most recent portal visitors and their marked listings. Click on their name to view their activity.
12. **Contact Requests** when a Client makes a contact request from the Portal

Pillar 9™ Data Portal Home Page

The following section highlights some of the areas you need to edit and customize with your personal information and areas of interest.

Hot Sheets

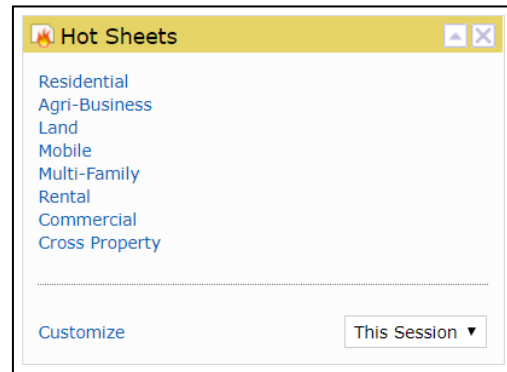
Hot Sheets are searches that can use the Status Change Types in the system to provide quick information on what has happened recently in the market.

By default, there is a Hot Sheet for each Property Type. To edit or add a Hot Sheet follow these steps.

- Click on My Matrix → Settings → Hot Sheets.
- Under the Manage Hot Sheets option click Add, Edit, Delete or Move the Hot Sheets as needed.

Or

- Click on Customize under Hot Sheets from the Home page.
- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.



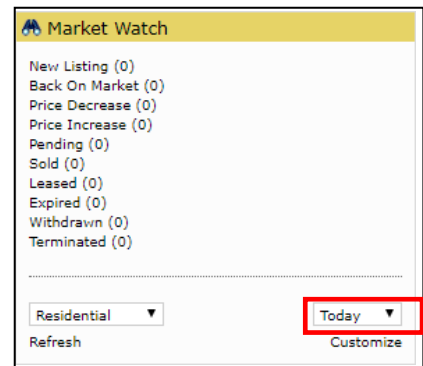
Market Watch

Market Watch is available on the Home page to provide you a quick look at what changes have occurred with listings in the system. Below is an explanation of the first few Change Types.

- *New* - Listings that are new to the system (see time frame below).
- *Back on Market* – Listings that are marked as pending and have returned to active
- *Price Decrease* – Listings where a decrease in price occurred.
- *Price Increase* - Listings where an increase in price occurred.

The **location for Market Watch will be set to the province**, you will need to customize this to your preferred location by following the steps below:

- Click on Customize
- This will open the Search page.
- You can customize specific property types here or just change the city to your location.



Note – If searching within a City (e.g. the city of Red Deer) both the County and the City will be the same. And you would then input the community under the subdivision field. We will cover the subdivision field in more detail in the search and input sections of this course.

The screenshot shows a search interface with four main filter sections:

- County:** A text input field containing 'Red Deer' with a close button (x) and a help icon (?). Below it are radio buttons for 'Or' (selected) and 'Not'.
- City:** A text input field containing 'Red Deer' with a close button (x) and a help icon (?). Below it are radio buttons for 'Or' (selected) and 'Not'.
- Subdivision:** A text input field containing 'Johnstone Park' with a close button (x) and a help icon (?). Below it are radio buttons for 'Or' (selected) and 'Not'.
- District:** A list of three options: 'Zone Bearspaw', 'Zone CC', and 'Zone E', each with an unchecked checkbox and a help icon (?).

For town/villages outside a major center you will enter the County and then the City/Village/Hamlet e.g.

The screenshot shows a search interface with two main filter sections:

- County:** A text input field containing 'Athabasca County' with a close button (x) and a help icon (?). Below it are radio buttons for 'Or' (selected) and 'Not'.
- City:** A text input field containing 'Rochester' with a close button (x) and a help icon (?). Below it are radio buttons for 'Or' (selected) and 'Not'.

- Click Save

There are three options from the Home page to quickly change your look at the market.

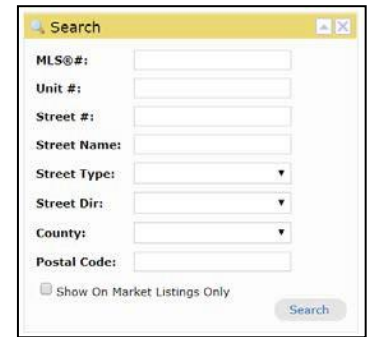
The screenshot shows two filter controls:

- A dropdown menu currently showing 'Residential' with a downward arrow. Below it is a 'Refresh' button.
- A dropdown menu currently showing 'Today' with a downward arrow. Below it is a 'Customize' button.

- *Property Type* – Used to switch between Residential, Commercial, etc.
- *Timeframe* – Used to switch between Today, 24 hours, 3 days and 7 days.
- *Customize* – Used to narrow the criteria instead of defaulting to all listings.

Search Widget

You will be able to complete a quick search for a property right from the Home Page using the Search widget.



The image shows a search widget titled "Search" with a magnifying glass icon. It contains the following fields: "MLS@#:", "Unit #:", "Street #:", "Street Name:", "Street Type:" (a dropdown menu), "Street Dir:" (a dropdown menu), "County:" (a dropdown menu), and "Postal Code:". Below these fields is a checkbox labeled "Show On Market Listings Only" and a "Search" button.

My Favorite Searches

This is something you will need to set up. Below are the steps you can follow to set up some favorite searches. Try setting one up for yourself, before you set one up for a client so you understand the different property types and characteristics you can search for.

Set up My Favorite Searches – My Favorite Searches appear on the Home page of Matrix™. You can enable up to 10 searches to appear on the Home page.

- Click on My Matrix → Saved Searches to view your Saved Searches.
- Click on the arrow to the left of the Saved Search name.
- Click on Settings.
- Check the box to Enable as Favorite Search on Home tab.
- Click on Save.
- NOTE: There is no limit to the number of Saved Searches or Speed Bar Searches allowed.

My Matrix

The following section highlights the areas in the My Matrix tab that will need to be completed to optimize your

- **Dashboard** will bring you back to My Matrix main page.
- **Summary** provides a way for the Agent to navigate through the most commonly used features in Matrix.
- **Settings** provide you access to your personal information. You can set-up shortcuts, hot sheets, custom displays, or exports.
- **My Information.** Go to My Information tab and update your personal information, upload your photo and header/footer. Input your details here for your CMA cover sheet and Portal profile. You can also manage how your CMA cover page; portal welcome page and signature appear.
- **Contacts** is where you can add any of your contacts. Add them or Import them on this page or add a contact when you send an email through Matrix or saved a search.
- **Saved searches** is the tab where all your searches are saved. You can manage your searches by clicking on the arrow next to the search and selecting the required action.
- **Auto Emails** are saved searches that email new search results to your clients that match their search criteria.
- **Sent Email** contains the history of your sent emails. Emails you send through Matrix, either directly or via an Auto Email, will appear here.
- **My Listings.** You can sort your listings using various criteria. Select “My Hit Counters” in the drop-down list under “Show” field and you can see the number of times listing were sent to clients, client views, how many people marked your listings favourite, a possibility or rejected the listing.
- **My Information.** Go to My Information tab and update your personal information, upload your photo and header/footer. Input your details here for your CMA cover sheet and Portal profile. You can also manage how your CMA cover page; portal welcome page and signature appear.
- **My CMAs.** When you create a CMA report, it can be viewed here. CMAs are reports that show the value of a property based on previous sales of comparable properties.

My Information

- Click on My Matrix
- Click on My Information
- Click through the tabs and complete all the information. This is the information that will display on your listings, your client portal pages, CMA reports and your auto-emails so ensure it is accurate.
- Click save.

Editing your Header & Footer

This is the header and footer that can appear when printing Reports as well as on the Portal.

- Click on **My Matrix™, My Information, Header & Footer.**
- If you want to use one of the templates provided, Click on the **selection bubble** to the left of the one desired.
- Click on **Preview.**
- Choose **Select a Different Package** if you want to change the template.
- Upload a Photo of yourself, if desired.
- Click on **Save.**
- **OPTIONAL** - If you want to create a Custom Header/Footer
 - Click on the **selection bubble** to the left of Upload Custom Header/Footer.
 - Click on **Upload Images.**
 - Upload images choose sizing and coloring as desired.
 - Click on **Save.**

Note: For best results, the optimum image size for an agent photo is 66 x 79 pixels and the header/footer banner are 1200 x 85.

Contacts

You can add and edit your Contacts here. You can import contracts from a .csv file or add the information on your own. Put in as much information as possible so that when you reach out to you clients you have something personal to refer to, such as their kids or pets' names, birthdays, etc.

To add a new contact, follow the steps below:

- Click the +Add button
- Complete the required information, shown as yellow highlighted fields
- To add more information, click the +Show All Fields button

To edit your existing contacts, follow these steps:

- Click on My Matrix →Contacts to view your Contacts
- Click on their name to get the editing options.
- Click on the pencil icon if you need to update someone.
- A pop-up will appear with a few pieces of information. If you need to see more information, click on Show All Fields to see all the pieces of information about your Contact.
- Click on Save when finished.
- You can also Delete a Contact, view their Auto Emails, Carts, CMAs, Sent Emails, Searchers and Portal Searches here.
- The Contacts, Auto-Email and Portal features of Matrix™ are integrated with each other. Make sure you read the sections on Auto-Email and Portal to understand more about how they work together.

Saved Searches

This is where you will manage your saved searches. You can edit the saved search name, assign it to a specific client, add or remove it from the Home page or delete it.

“Date Since” will display the results of your saved search since the last time the search was run.

My Listings

You can view your listings here. There will be more information on how to add and edit your listings in the Input Tool module.

My CMAs

This is where your CMA reports will display. You can follow the instructions in this video how to create a CMA. https://www.youtube.com/watch?v=kQccjTzd_ul&feature=youtu.be

Search Functionality

The search functionality is designed to be property centric, meaning properties are categorised based on attributes you require. Through the search you set-up emails that go to your clients, so you need to know how to narrow it down based on their needs.

Property Types

Residential	<p>A property that is owned for people to live in. This includes:</p> <ul style="list-style-type: none"> • Detached • Semi-detached • Row • Condominium properties. <p>Note: mobile/manufactured homes that are being sold with deeded land should also be included in this property type as detached.</p>
Multi-Family (Multi-unit)	<p>A listing where 2+ units are being sold together, regardless of whether they are connected. This will include both residential listing (2 – 4 units) and commercial listings (5+ units)</p> <p>Note: to practice in the transaction of 5 or more units you must be licensed by RECA for commercial real estate and these listings would be entered as commercial transactions.</p>
Agri-business	<p>A property where the primary purpose is agricultural.</p>
Land	<p>A property that does not have a dwelling on it, including rural acreage parcels and vacant residential lots. Should include all land parcels regardless of their zoning.</p> <p>Note: residential properties with condemned buildings should also be sold as land.</p> <p>You cannot enter a land listing with a residence on it unless it is condemned, and you must select the Condemned Residence option. Otherwise it is entered as a Residential and should be disclosed in the remarks that it is land value only.</p>
Mobile	<p>Mobile home on rented/leased land.</p> <p>Note: if a mobile home includes land with the sale it should be listed under detached residential.</p>
Commercial	<ul style="list-style-type: none"> • Office • Retail property • Industrial
Cross-property	<p>You can select any combination of the above search types.</p>
Rentals	<p>Residential Properties for Rent</p>

Please note: Vacant Agri-business land can be listed under land and agribusiness at the same time, marketing the property as both on the system simultaneously. Please note, in the case of a sale you are to report the listing according to which contract or MLS® Listing it sold under, so if the Agri-Business listing was sold, you would mark that listing as Sold accordingly, while Terminating the Land listing for the same property, and vice versa had the Land listing sold.

Refining Your Search

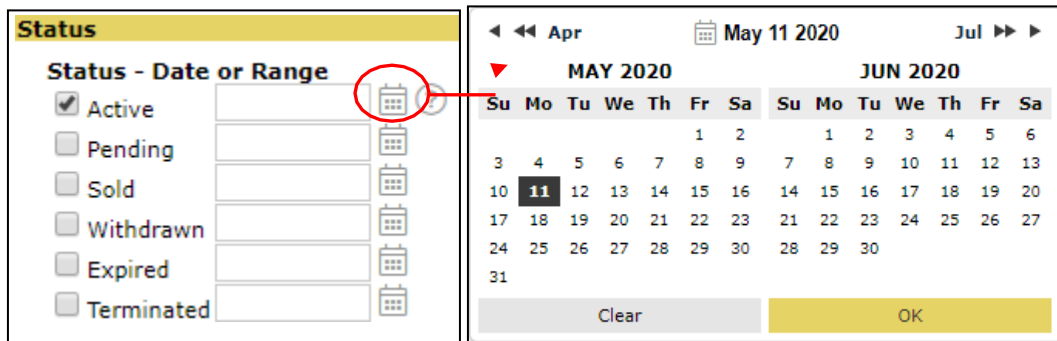
Once you have selected the appropriate property type, you can quickly refine your search by completing more information on the search screen. The button bar at the bottom of the search screen tracks results in real time.



Statuses

Using the Status button, you can select the status of the properties you wish to include in your search.

By selecting the calendar button, you can select date ranges by clicking on the dates or by using arrows to include larger date ranges.



Active

- An MLS® Listing Contract is in effect and the listing is being marketed through the Board's MLS® System.
- What this means: The listing is viewable by members and being pushed to external websites like REALTOR.ca.
- Your listing must contain all required fields and pass validation before it can be made active.

Pending

- The MLS® Listing is subject to a conditional offer and continues to be marketed through the Board's MLS® System to external websites like REALTOR.ca.
- What this means: The listing is viewable by members and public alike.

Sold

- The MLS® Listing is reported Sold when subject to an offer with no conditions remaining other than closing.
- What this means: The MLS® Listing is changed to Sold status when conditions are removed.

Withdrawn

- An MLS® Listing Contract is in effect but the listing has been temporarily removed from being visible on the Board's MLS® System.
- What this means: This status allows for a listing to be temporarily removed from the system for various reasons.
- Max 10 calendar days (as per harmonized rule), DOM continue to accumulate.

Expired

- An MLS® Listing where the term of the Listing Contract has ended.
- What this means: The listing has reached its contract end date without amendments or extensions.

Terminated

- The MLS® Listing Contract has been terminated by the Seller and the brokerage.
- The Associate must complete a termination form and submit to their Broker.
- The Broker may terminate the listing themselves or submit the termination paperwork to the Board who may terminate the listing on their behalf.

Sub Type

Select Sub type you require.

SubType ?

Apartment

Detached

Duplex

Recreational

Row/Townhouse

Semi Detached

Or Not

Residential Property Sub Type Definitions

Apartment	A unit within a building with interior hallways.
Detached	A unit (home) this is not attached to any other unit.
Row/Townhouse	A unit (home) that is in a building where there are 3 or more living units, and the entrance is directly to the outside.
Residential Duplex	Used when selling both sides of a Duplex with one title.
Residential Semi Detached	Used when selling one side of a Duplex.
Multi-Family Duplex	Used when selling both sides of a Duplex with two separate titles.
Recreational	A property that does not have year-round living and is primarily used for seasonal recreation.

To make multiple selections within a field, press the “Shift” button as you click on your desired options. To deselect click “Ctrl” and click selected option.

To include the options, you have highlighted in your search, select “Or” below the field.

To exclude the options, you have highlighted in your search select “Not”.

Some of the fields have an “And” button below them that allows you to combine features in your search.

Note: If you are selling both sides of a Duplex, and each side has its own title, you would list this property under Multi-Family → Duplex.

Property Type	Property SubType	Notes
Residential	Duplex	Used when selling both sides of a Duplex with one title
	Semi Detached	Used when selling one side of a Duplex
Multi-Family	Duplex	Used when selling both sides of a Duplex with two separate titles

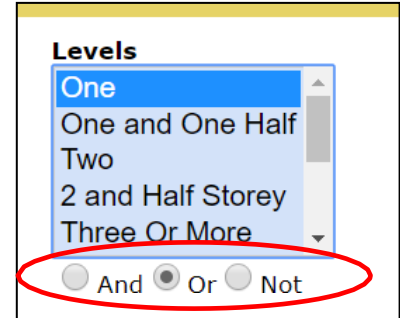
Selecting More Fields and Using the Or, Not, And Functions

To make multiple selections within a field, press the “Ctrl” button as you click on your desired options. To deselect hold “Ctrl” and click selected option.

To include the options, you have highlighted in your search, select “Or” below the field.

To exclude the options, you have highlighted in your search select “Not”.

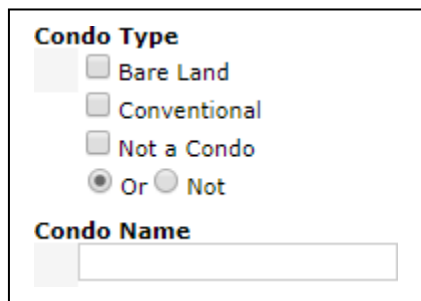
Some of the fields have an “And” button below them that allows you to combine features in your search.



Condo Type

Whether your search returns properties that are conventional condominiums, bare land condominiums or not condominiums are determined in the Condo Type field after you have selected the type of search you wish to perform.

This means you can search any of the search types listed above, with the ability to include or exclude condominiums. You can also look for specific condo developments.

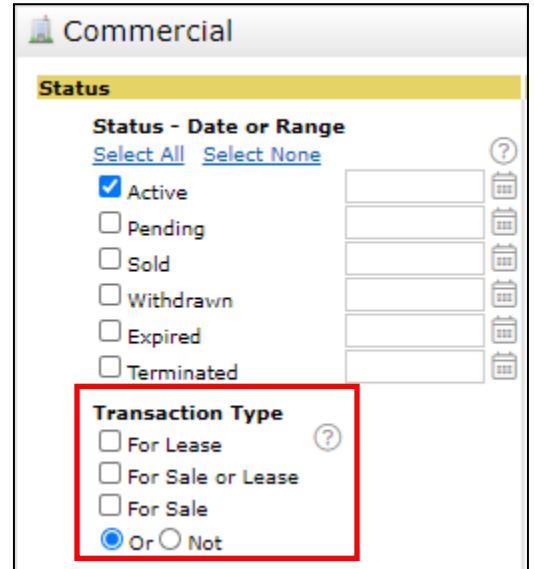
A screenshot of a search interface. At the top, the text "Condo Type" is written in bold. Below it are three checkboxes: "Bare Land", "Conventional", and "Not a Condo". Below these checkboxes are two radio buttons labeled "Or" and "Not". Below the radio buttons is a text input field labeled "Condo Name".

Leased (Searching for Leased Properties)

Leased status can be found as a **transaction type** under the Commercial property type.

Members who are searching for leased properties, for example the number of leased properties in the last 180 days, would complete the following search.

1. Navigate to Matrix → Search → Commercial
2. Select “Sold” from the Status list with the desired date range
3. Select “Leased”
4. Add any additional search criteria as desired



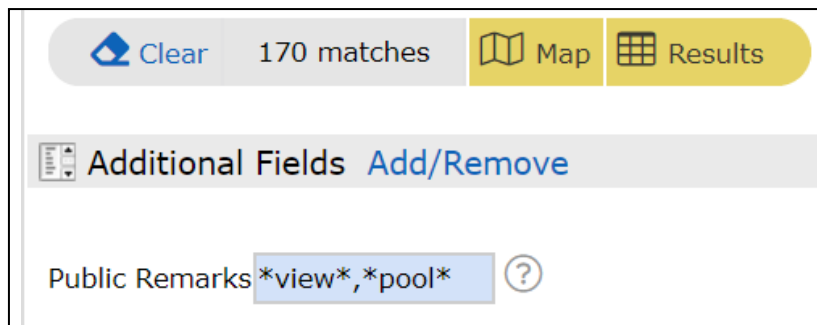
Searching in Text Fields

Some fields in the MLS® System are text fields, where associates may enter free form text. This includes fields like Public and Agent Only Remarks, Goods Included and Owner Name.

When searching in these fields you can employ some of the following techniques

1. Type the name of the item you wish to search in the provided field.
2. If the full name is not known, or the spelling is unclear, use the asterisk (*) to replace the missing information.
3. Use a comma to separate individual parameters such as the names of two items.

For example, to search for pool and view in the public remarks you could enter the following. A reminder that the * before and after the search item will broaden your search by including anything before or after your search term.



Location

Use location fields to focus your search results. You can setup your search criteria using the address, county, city, subdivision, and district.

Location

Map Search: No Map Selected ?
 Within km of [My Location](#)

St #	Street Name	Street Suffix	Dir Sfx	Unit #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[More](#)

County ?
 Or Not

City ?
 Or Not

Subdivision ?
 Or Not

District ?
 Or Not

Condo Name ?

County – indicates what County, Municipal District or City your property is in.

City – indicates what City, Town, Village, Hamlet this property is in. If none of the above, then you indicate the rural municipality again.

Subdivision – indicates what subdivision or community the property is in.

District - used primarily to track location statics for the economist.

Note: If searching within a City both the County and the City will be the same.

Features

Matrix™ allows you to refine your search parameters using a variety of search fields. Frequently used search fields appear on the main screen, including some property features.

Features

Structure Type
 Cabin
 Other
 Duplex
 Five Plus
 High Rise (5+ stories)
 And Or Not

Levels
 One
 One and One Half
 Two
 2 and Half Storey
 Three Or More
 And Or Not

Architectural Style ?
 And Or Not

Laundry Features ?
 And Or Not

Basement ?
 And Or Not

Restrictions ?
 And Or Not

Levels provides a description of the stories/levels of the individual property you are selling.

The options available for this field will depend on the Property Subtype you choose.

Please see the RECA Guide to the Residential Measurement Standard Alberta - <https://www.reca.ca/wp-content/uploads/2018/07/Guide-to-the-Residential-Measurement-Standard-Alberta.pdf> (p. 33) for more information on selecting the correct level entry for detached properties.

Remember that this field is a description of the unit you are selling, not the building the unit is in.

Structure Type field where you will indicate the type of structure. For instance, for detached you will be able to choose between a house and manufactured home. Or for an apartment, you can indicate if the building is a low rise (2-4 stories) or high-rise (5 or more stories).

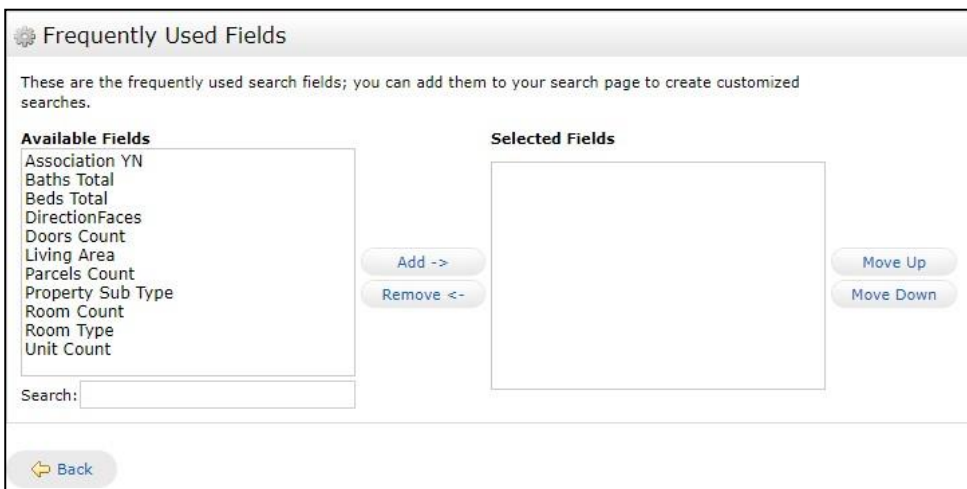
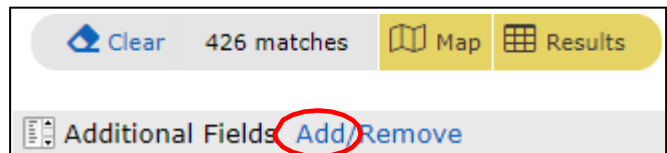
The options available for this field will depend on the Property Subtype you choose.

Architectural style is a required field for residential listings that is there to provide additional opportunity to market your property. For example, this is where you can say I have an acreage with land, or that the one storey home is a bungalow. This information, however, could also be included in your public remarks.

Additionally, some fields in Architectural Style are linked to input. For example, if you select Acreage Y when inputting a listing, then the Acreage with Residence option under architectural style will become selected. This is how you can enter and search for acreages.

Additional Fields

You can add additional fields using the “Additional Fields” button at the bottom of the page.



Select Add and the screen will appear allowing you add your custom selections.

Note: Once you have added fields, they will stay on your search page for that particular property type, even if you log out and log in again.

Property Info

On the right of the search screen is the Property Information column. This is populated with frequently used fields that can enhance your search.

You can use shortcuts to help narrow your search with respect to fields with numeric values like size and number of bedrooms etc.

Use symbols “+” and “-” to indicate greater than or less than values.

The example below shows the search of properties with 3 or more bedrooms, 2 or more full bathrooms, was built between 2000-2010 and is listed at \$400 000 or more.

Property Info

Price
 (000s)

MLS #

Total Bedrooms

Bedrooms Above Grade

Full Baths

Half Baths

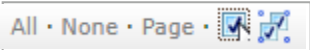
Total Baths

Map Search

You can use “Map Search” feature as an initial step in creating your search or refining your results. Using the buttons along the top of the map page, you can easily move from the results screen to the map screen and even back to the criteria, so you can quickly refine your search.



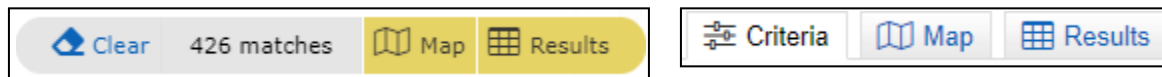
WHAT?	WHY?	HOW?
Select a specific area	To meet a client’s specific community/area requirements	<ul style="list-style-type: none"> Select a drawing tool from the top button bar Draw a shape around the desired area
Exclude a portion of a specific area	Your client prefers a particular community but wants to avoid certain areas	<ul style="list-style-type: none"> Select the appropriate drawing tool from the top button bar Draw a shape around the area you wish to exclude Click on the red button to “Exclude the Shape”. Listings inside this shape will not appear in your results
Create a radial search	Your client wants to live within a certain distance of work or school	<ul style="list-style-type: none"> Select the circle button from the top button bar Place your cursor on the desired location and drag the cursor

		<ul style="list-style-type: none"> The distance will display as you enlarge the circle
Select specific/multiple results from the map	You have generated search results and want to quickly select them to send to a client	<ul style="list-style-type: none"> Using the button bar at the top of the map you can select all or none of the results Using a single check mark, you can individually select listings. Using the icon with two check marks, you can click and drag your cursor over a specific group of listings to add them all. 

Search Results

You can review the results for your search criteria using the button bar at the bottom of the page.

If you want to view your search results using the agent detail view, single line or other report styles click on the results line either on the top or the bottom of the bar.

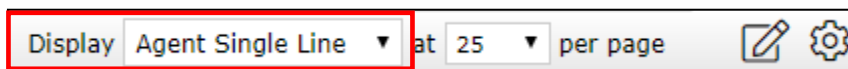


Since there may be listings from across the province, you may need to navigate to a specific area on the map. This will depend on how broad the search criteria you put in and where listings are mapped.

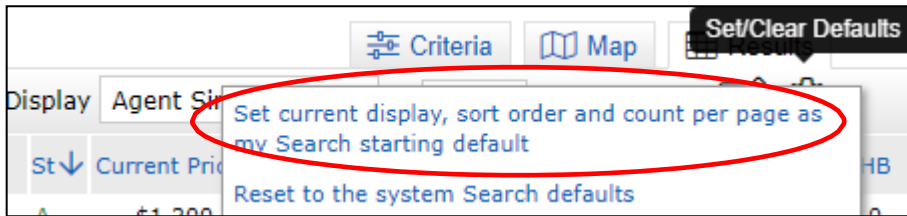
Setting a Default Display

The results are displayed as “Agent Single Line” by default, but you can change it to the display you prefer but following the steps below:

1. Select the display you prefer from the display drop-down on the Results page.



2. Click on “Settings” button beside the display drop down at the top of the page and make that your default search.



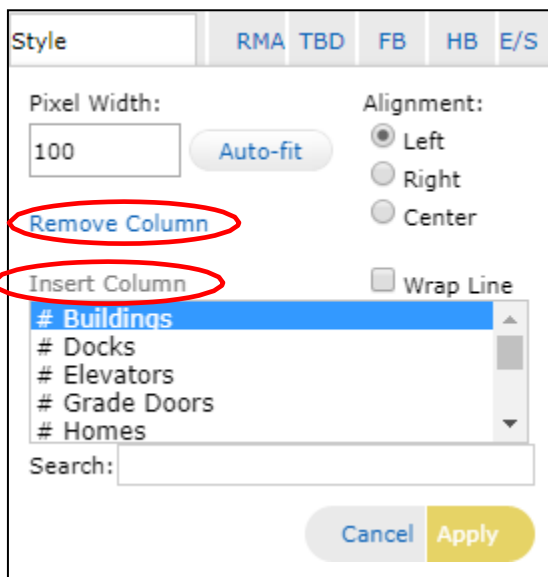
All future searches within this property type will default to this view selection. Note that you need to repeat this step for each property type. You can reset system search defaults through settings as well.

In order to reset the system search defaults, return to settings button, and select “Reset to the system Search defaults”.

Custom Display

You can also customize the single line display to meet your needs.

- Click directly over the column name to reorder your list.
- Click inside the column header text box (not the column name) and the following customization tool will appear. You can add or remove columns inside this tool. Clicking “Remove Column” will remove the column you are in. If you wish to insert a column, click “Insert Column”, then search for criteria you wish to insert and “Apply”.



- You can also rename, move or re-size your column, by clicking inside it.

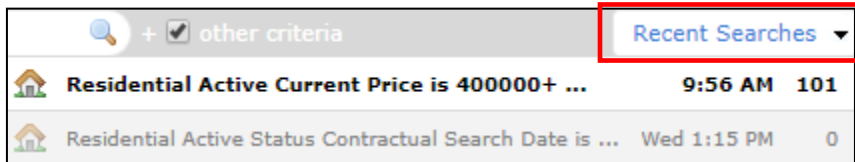
When you are satisfied with your customized search results screen remember to save it using the settings button.



You can also save a copy of your display through the “Manage Displays” icon and then customize it in the Custom Displays section under My Matrix.

Recent Searches Feature

Recent Searches capture the 50 most recent searches. If you performed a search and forgot to save it, you can find it in recent searches. Click the “Recent Searches” drop down at the top of the page to see the list.



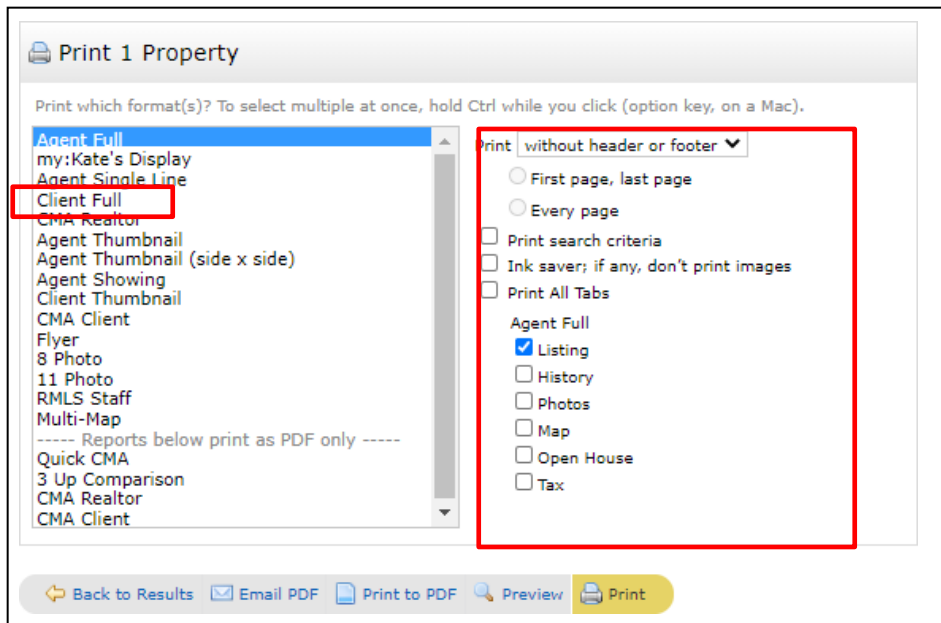
Search Results Button Bar

Using the button bar at the bottom of the screen, you can take full advantage of all the features in Matrix™.

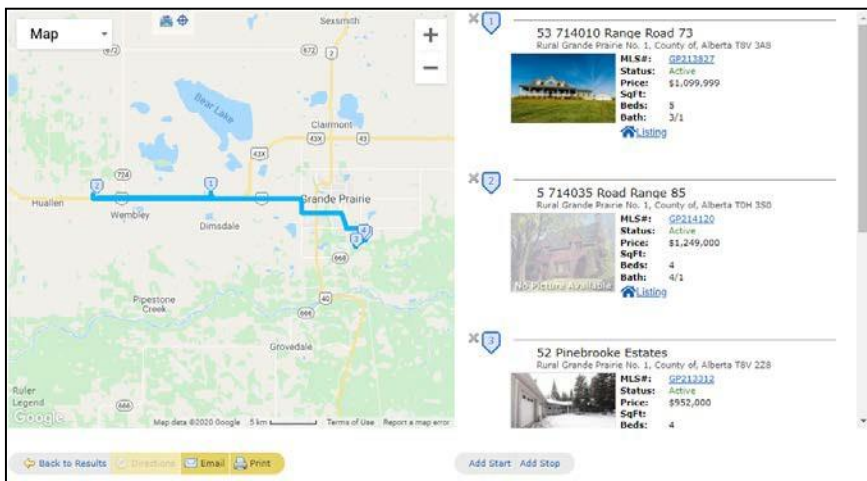


Actions:

- **Criteria:** You can go back and refine your criteria.
- **Print:** You can print your results or export them in PDF. You can select which of the tabs you wish to print. For example, you can select Listing, for the listing info. Or if you are printing for yourself you can choose “Print All Tabs”. You also have different pre-set options to choose from, for example, Client Full.



- Directions. Create driving directions for your showings
 - You can add a starting location and an end point. You can also re-order the listings
 - The system generates a suggested route, which you can edit.
 - Use the add start/add stop buttons at the bottom of the driving order to add the starting point and end point for your directions.



- Stats. Using the listings your search generated, you can run a variety of stats and conveniently create graphs. The stats feature gives you two options, “Charts” and “Tabular”.



- The Charts option will only produce charts using all of the search results and will not be available once you have selected listings within the search. If you select charts, you will be taken to a page where you can select from a variety of statistical choices and can customize your stats.
- Tabular chart is always available, even specifically for the listings you have selected within the search. It will look like this:

Market Analysis

Mls Status: Active (6)

	Beds	Baths	SqFt	List Price	Lot Size Acres	\$/SqFt	LP/Acre	\$/Bldg Area	Close Price	SP/SF	SP/Acre	SP/Bldg Area	DOM
Min	4	3	-	\$1,250,000		-	-	-	-	-	-	-	4
Max	5	4	-	\$2,700,000	301	-	-	-	-	-	-	-	346
Avg	5	4	-	\$1,816,800	61.2	-	-	-	-	-	-	-	119
Median	5	3	-	\$1,593,500	1	-	-	-	-	-	-	-	44

Back
 Print

Refine:


Use the lower button bar and select “Refine”.

You will be able to view your property as one of your contacts to see if they have viewed the property. You can also narrow your search to only listings you have selected, select and discard properties or use sorting button to add various criteria to the sorting order.



To refine results, check off those listings you wish to keep, then go to “Refine” and click “Narrow”. All unchecked properties will be removed. Click “Original Results” on the top of the table in a light grey colour to get back to your original results.



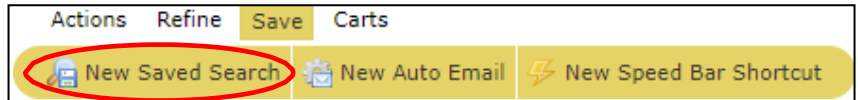
“Discard” removes selected properties (click  on the button bar to undo this action).

“Sort” your Single Line Display by groups according to the sort fields chosen.

Save:

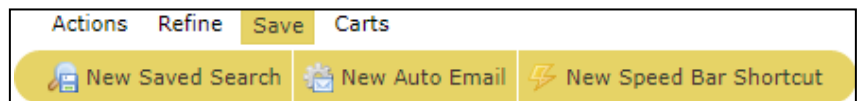
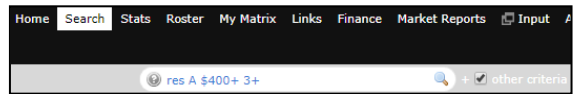
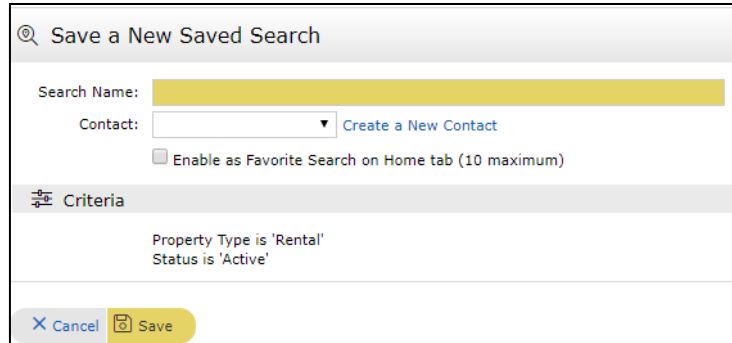
- You can create a new saved search by naming it, associating it with your contact and enabling it as a favourite on the home page. You are limited to 10 favourite searches on the Home page but can have numerous searches available under “My Matrix” saved searches.

1. Click on “New Saved Search”



2. Name your Search, assign to Contact (optional) and save.

-
- Create a new auto-email associated with a client.
- Create a speed bar shortcut. Use this feature to create a custom title that will allow you to access the search in the speed bar. You need to remember the name you gave the search, and it must always have “/” before the name. The speed bar is located at the top of your screen.



Carts:

Carts allows you to save listings and link them with a client, while working on other searches. If you come across the listing you would like to look at later or send to another contact, you can add it to their cart. You can then continue working on the project you have started and later access the client cart on the “Home” page under “My carts”.



Additional Features

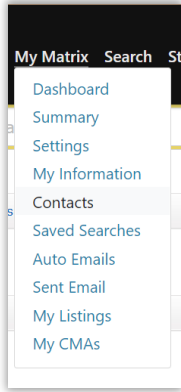
On the right-hand side of the single line display of results, you can see the icons that will allow you to quickly access additional features.

PH – History	VT – Virtual Tour	OH – Open House	Su – Supplement Information
Tx - Tax	GJ – GeoJet	WF - WEBForms	

Creating New Contact

Creating new contacts is an essential task you will perform on a regular basis.

1. From the Matrix™ navigation menu, hover over “My Matrix” tab and select “Contacts”.



2. Click “Add” on the Button Bar.



3. From the “Personal Information” screen, fill out mandatory fields (highlighted in yellow). Be sure to select the “Mortgage Pre-Approved” checkbox if this contact has been pre-approved. Click Save when finished.

A screenshot of the 'Add Contact' form. The form has several sections: Personal Information, Home Information, and Notes. Mandatory fields are highlighted in yellow: First Name, Middle Name, Last Name, Email Address, and the 'Mortgage Pre-Approved' checkbox. The 'Save' button at the bottom right is also circled in red.

Support Resources

For all Data Portal support questions please contact AREA at: datacoop@albertarealtor.ca