

1004 MC Form & Matrix MRMLS & Don's Program -

The following is a procedure for appraisers who use the Matrix MRMLS. It is a procedure that will facilitate an appraiser in filling in the **1004 MC** form. Before you begin, you need to realize this is a marriage of unrelated programs and data. It is light years better than doing the form manually – but is far from pushing just one button and having the form filled in. After you have it set up and run it a few times it will take you about 5 minutes from start to finish to fill in 1004 MC form - and you won't do even one calculation. So you understand – an appraiser named Don Machholz created an Excel spreadsheet for the 1004 MC form and is distributing it as freeware. He made the Excel spreadsheet for the MLS he uses – but it can (with some caveats) work with other MLS'. To get his program go http://www.donsappraisals.com/1004_MC_Spreadsheet_1.html . Download the Generic Spreadsheet for the 1004 MC 4a (NOT 4b). Once you have the program I suggest you immediately make a second copy (with a different name) in case you hit "Save" at some point. Remember where you saved the program.

My hat is off to Don for this program and the many hours of laborious hours it will save appraisers who use it.

Next, the following procedure works – it may not be the most efficient and some may be able to do it better – but it works ! Don has written a 4b program - but for the MRMLS I am unable to get around some math errors generated for the "Results > "for URAR, top of page 2:" comparable sales" as it miscounts the number of sales and has the lowest comparable sale for the last year as "\$0". If you break your export into two downloads (for Excel) as noted below, all seems to be accurate.

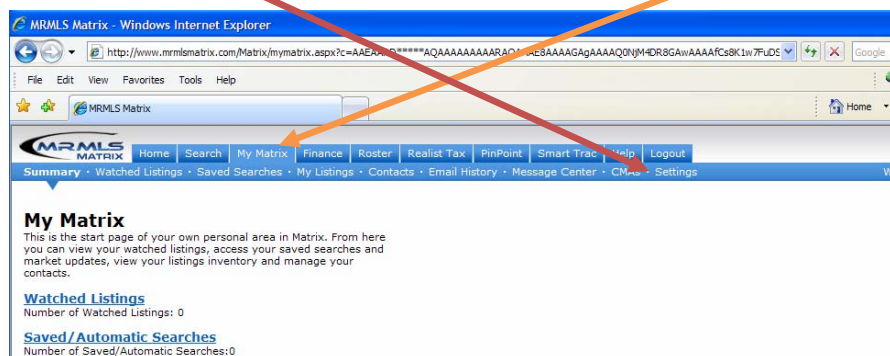
Overview – where we are going >> you will get into the MRMLS using your normal log-in procedure. If you get onto the MRMLS through the Sandicor MLS this procedure will not work since there is no way to save an export in a custom format. You will then make two data export templates - run comparables and export the data in .txt format to your desktop. Then you will put it into some Excel spreadsheets – do some copy/paste and finally put it into Don's program. Setting this up takes 30-60 minutes. The templates need only be done once since you'll save them on the MLS. Once you get the hang of it (probably doing it two or three times) – it will take you about 5 minutes from start to finish for the 1004 MC form (and the top of page 2 on the URAR).

You need to have Excel (from Microsoft) on your computer. If you don't have Excel you can download a free spreadsheet program that mimics Excel at www.openoffice.org . All instructions below are written for Excel.

Ok, here we go.....

Get on the MRMLS using you normal log-on procedure (not through Sandicor) – Click to My Matrix (near the top).

Click on Settings.



Click on “Custom Exports” then “Add Export”

“Export Name:” should be “1004 MC NOT Sold – Export”

“Include Column Names:” is None and Separator: is Comma.

MRMLS MATRIX

Home Search My Matrix Finance Report Realist Tax PinPoint Smart Trac Help Logout

Summary Watched Listings Saved Searches My Listings Contacts Email History Message Center CMAs Settings

Set Export Definition

Here you can define the output of an Export

Residential

Export Name: 1004 MC NOT Sold - Export Export Description: []

Available Fields	Export Fields
SqFtSource Compact	Status
Square Footage Structure	
State	
State Compact	
Status	
Status Compact	
Stories	
Stories Compact	
Street Direction	
Street Direction Compact	
Street Direction Suffix	
Street Name	

Include Column Names: None Label Name

Separator: Comma Tab

Save Cancel

Powered by matrix

If you have any questions, please call the MRMLS Customer Service Department between the hours of 8:30am to 9:00pm Monday thru Friday or 10:00am to 3:00pm Saturday and Sunday at 800-925-1525 or 909-859-2040. You can also submit a support request online at our [Support Request Page](#) or by typing [www.imrms.com/support](#) on your browser's address line.
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Next you need to move the following from the left box to the right box.

From “Available Fields” – (left box) scroll down and click on “Status” – then click on "Add ->". That should add “Status” in the right box.

In addition to the above - Move the following items from the left box to the right box:

- Multiple Listing Number
- List Price Original
- Date Status Changed
- Year Built
- Square Footage Structure
- Lot Square Footage
- Date of Listing
- Date of Pending

So in the right box you should end up with a list that looks like:

Status
Multiple Listing Number
List Price Original
Date Status Changed
Year Built
Square Footage Structure
Lot Square Footage
Date of Listing
Date of Pending

MRMLS MATRIX Home Search My Matrix Finance Roster Realist Tax PinPoint Smart Trac Help
Summary Watched Listings Saved Searches My Listings Contacts Email History Message Center CMAs

Set Export Definition

Here you can define the output of an Export

Residential

Export Name: 1004 MC NOT Sold - Export Export Description:

Available Fields

- Spa? (Y/N)
- Sprinklers
- Sprinklers Compact
- Sprinklers? (Y/N)
- SqFtSource
- SqFtSource Compact
- Square Footage Structure
- State
- State Compact
- Status
- Status Compact
- Stories

Export Fields

- Status
- Multiple Listing Number
- List Price Original
- Date Status Changed
- Year Built
- Square Footage Structure
- Lot Square Footage
- Date of Listing
- Date of Pending

Include Column Names: None Label Name

Separator: Comma Tab

Save Cancel

Powered by matrix
If you have any questions, please call the MRMLS Customer Service Department between the hours of 8:30am to 9:00pm Monday thru Friday or 10:00am to 3:00pm Saturday and Sunday at 800-925-1525 or 909-859-2040. You can also submit a support request online at our [Support Request Page](#) or by typing [www.inrrmls.com/support](#) on your browser's address line.
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THE ITEMS ABOVE MUST BE IN THE ABOVE ORDER !!!

Click on the Save button.

Now – we’re going to do it again – with some changes.

Click on the "Add Export" button. The name of the second export will be “1004 MC SOLD – Export”
Create the following list in the right (Export Fields) box:

Status

Multiple Listing Number

Selling Price

<-- note this is a change from the previous list

Date Status Changed

Year Built

Square Footage Structure

Lot Square Footage

Date of Listing

Date of Pending

Date COE/End

<-- wasn't on the last list

Click on the Save button (bottom of the window).

Exporting data –

When doing this for the first time I suggest you get a recent (or current) appraisal in front of you so you can use real parameters.

In the MRMLS Click on Search - quick residential.

First we will do non-sold comparables –

Search for comparable properties for your subject property (recent/current appraisal suggested above). Put in whatever parameters you use to sort out possible comparables (i.e. +- 300 sq.ft. living area, year built, bedrooms, baths, map code, etc) (by the way if you don't use the "Search Map" function I recommend it).

For **List Status** you want: Everything except Closed Sale.

For **Status Date**: you want a minimum of 2 years prior to the date of you appraisal. Why 2 years ? It allows the program we will use to try to determine active listings during the last (1) year. Confusing ?? (2 years versus 1 year). Part of the 1004MC form wants active listings from 7-12 months ago – some of those active listings may have started prior to 12 months ago – so we will give it data sufficiently prior to 12 months ago for it to include listings that were already "active" when the 12 months ago started).

OK – come up with your comparables for your subject property as just described (non-sold). Click on the "Search" button. You should get a list of non-sold comparables.

Select all comps (Click on "Check all ##"). If you can see a comp which is an aberration (i.e. price is \$1,040,000 when you know it should be \$140,000) then uncheck/unselect that comparable. The MRMLS may also have duplicate listings (two different MLS') one of which you should uncheck.

ML#	S Type	ST#	St Name	City	Area	TG#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM	V	P	SOC	Date	MLS
T0902941	X SFR/D	45613	Clubhouse DR	TEM	209	0979B4	\$199,000 ↓	3/3.00	1986	2,068	8,712	216/216	Y	N	2.500	02/27/09	MRMLS
W08129492	X SFR/D	30868	Greenbriar DR	TEM	209	919C4	\$210,000	4/3.00	1986	2,068	8,276	171	N	N	3.000	01/10/09	MRMLS
T08090580	X SFR/D	42110	Humber DR	TEM	209	959A5	\$265,225	4/3.00	1988	2,042	12,632	114/114	N	N	3.000	10/21/08	MRMLS
T08062622	X TWNHS/A	28935	Rosewell CT	TEM	209	958H2	\$280,990	3/4.00	2009	2,075		36/36	Y	N	3.000	01/31/09	MRMLS
T08026610	X CONDO/A	40250	Rosewell CT	TEM	209	958G1	\$285,000	3/4.00	2006	2,077		98/98	Y	Y	3.000	09/22/08	MRMLS
T08051650	X SFR/D	31927	Calle Elena	TEM	209	959E3	\$213,900	3/2.00	2004	2,004	9,147	15/232	N	N	3.500	05/09/08	MRMLS
T07180125	X SFR/D	31927	Calle Elena	TEM	209	959E3	\$344,900 ↓	3/2.00	2004	2,004	9,147	53/151	N	N	3.500	02/27/07	MRMLS
T08112407	X SFR/D	42121	Humber DR	TEM	209	959A5	\$355,000	4/3.00	1988	2,042	9,148	171/171	N	N	2.500	01/22/09	MRMLS
T07148766	X SFR/D	41843	Shorewood CT #1	TEM	209	958J4	\$359,000 ↓	4/3.00	1989	2,018	7,840	46/46	N	N	3.000	04/01/08	MRMLS
T07136371	X SFR/D	31927	Calle Elena	TEM	209	959E3	\$359,900 ↓	3/2.00	2004	2,004	9,147	125/115	N	N	3.500	12/27/07	MRMLS
T07139788	X SFR/D	29590	Amwood Way	TEM	209	959J4	\$359,900 ↓	4/3.00	1989	2,018	7,840	209/209	N	N	2.500	05/01/08	MRMLS
T692029	X SFR/D	42032	calabria	TEM	209	958J5	\$365,000 ↓	4/2.50		2,000		168/168	N	N	2.500	09/02/07	MRMLS
T08128494	X SFR/D	40605	CALLE FIESTA	TEM	209	959C2	\$365,000	3/3.00	2003	2,000	30,491	37/37	Y	N	2.500	01/01/09	MRMLS
T07135568	X SFR/D	40567	Charleston WY	TEM	209	958H4	\$369,990	4/2.00	2001	2,011	4,800	19/174	N	N	2.500	03/14/08	MRMLS
I714170	X SFR/D	30425	Novato WY	MUR	209	929E7	\$375,000 ↓	3/3.00	1991	2,022		154/154	N	N	3.000	08/20/07	MRMLS
C720115	X SFR/D	42133	Humber DR	TEM	209	959A5	\$375,000 ↓	4/3.00	1988	2,042	9,147	324/324	N	N	3.000	02/16/08	MRMLS
T07092626	X SFR/D	40104	Bam CT	TEM	209	959A1	\$375,000 ↓	3/2.00	1998	2,033	6,534	366/366	N	N	3.000	07/03/08	MRMLS
T07137342	X SFR/D	40072	STANBURY DR	TEM	209	958J1	\$375,000 ↓	4/3.00	2004	2,064	9,484	84/84	Y	N	3.000	02/27/08	MRMLS

At the bottom of the page click on “Export”.

From the drop-down list choose “1004 MC NOT Sold – Export”. Click on "Export".

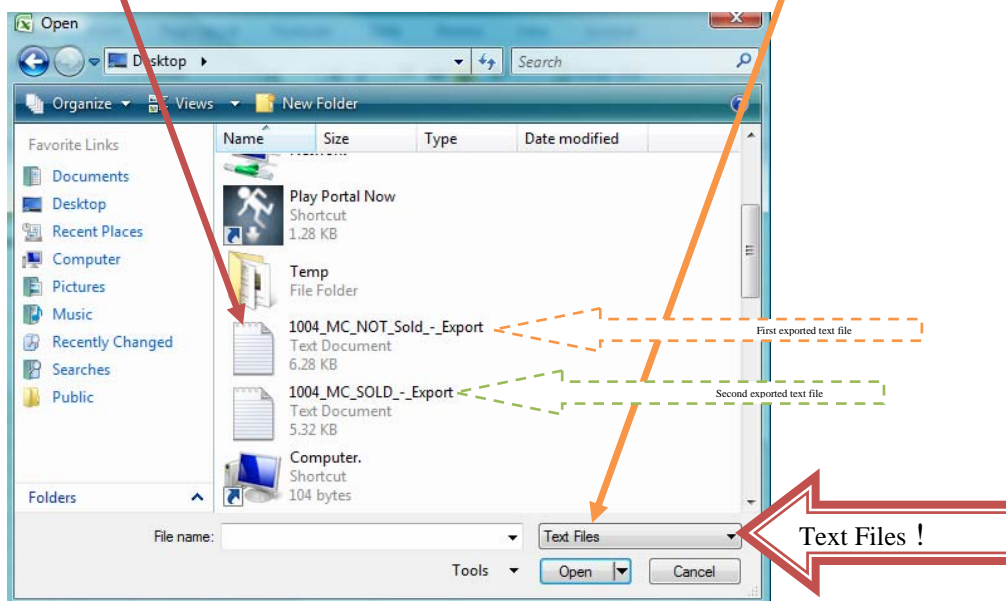
A File Download window will appear. Click “Save”. Download the file to your Desktop.

When that's done Click on “Return to Search” then "Revise" button -- Change the “Status” to SOLD. Click on Search – Select all comps (Click on "Check all ##") (edit any which shouldn't be included) – click on “Export” at the bottom of the screen. This time select “1004 MC SOLD – Export” from the drop-down list – Click on “Export”. Save the file to your Desktop. Log out of the MRMLS.

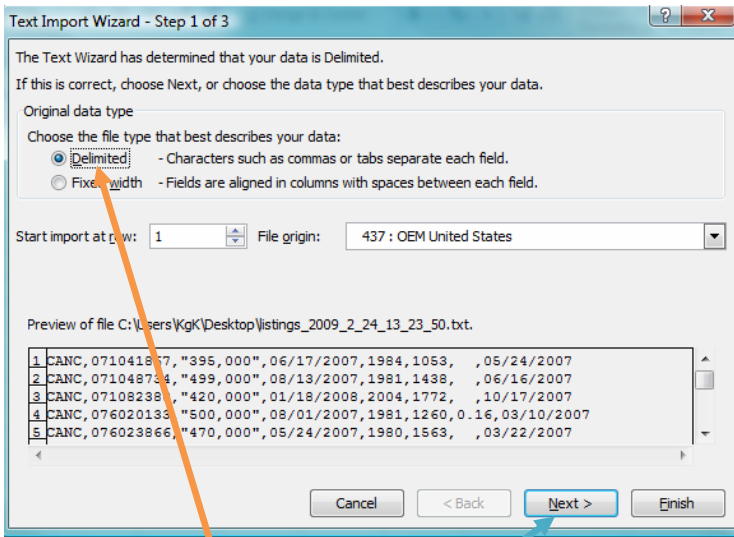
You have exported your comparable data to your Desktop and its time to get the data into Excel.

****Open Excel (could be called “Microsoft Office Excel”).** Go to the very top left and click on File or the Microsoft Office logo (depending on which version of Excel you have).

Click on “Open”. Be sure the box next to “File Name” is “Text Files”. Find one of the text files you downloaded to your Desktop and Click on it. If your file isn't on the list you either saved it somewhere else or didn't chose "Text Files".



A “Text Import Wizard...” should pop-up.



You want “Delimited” . Click “Next”.

Delimiters – click on the Comma box - uncheck anything else *uncheck anything else* **uncheck anything else** (did you get that part ?) Only the “Comma” box should be checked. Text qualifier: should be → “ ←. Click on “Next”. The “Column data format” should be “General”.

Click on “Finish”.

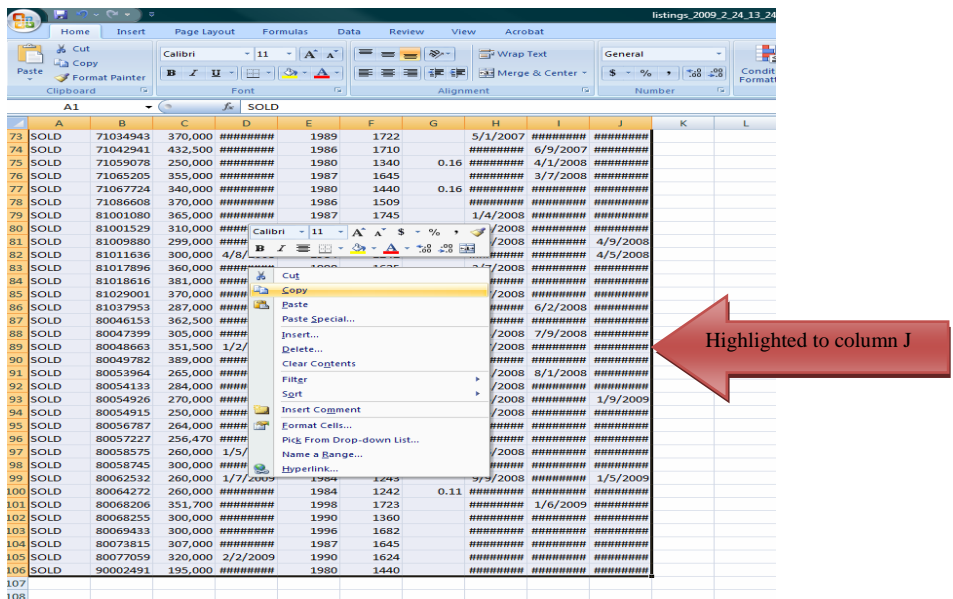
The data should now be in an Excel table and look something like the table below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CANC	71041867	395,000	#####	1984	1053		5/24/2007							
2	CANC	71048734	499,000	#####	1981	1438		6/16/2007							
3	CANC	71082380	420,000	#####	2004	1772		#####							
4	CANC	76020133	500,000	8/1/2007	1981	1260	0.16	3/10/2007							
5	CANC	76023866	470,000	#####	1980	1563		3/22/2007							
6	CANC	71031433	400,000	#####	1984	1053		4/16/2007							
7	EXP	76032709	545,000	#####	2000	1776		4/23/2007							
8	CANC	76033020	475,000	#####	1979	1675		4/23/2007							
9	CANC	71038339	520,000	#####	2004	1772		5/11/2007							
10	EXP	74041009	505,000	#####	1982	1480	0.13	5/15/2007							
11	CANC	71041717	460,000	#####	1980	1260		5/12/2007							
12	EXP	71048407	499,000	#####	2004	1772		6/15/2007							
13	EXP	71054300	440,000	#####	1979	1360	0.13	8/10/2007							
14	EXP	71064501	489,000	1/1/2008	2000	1776		8/11/2007							
15	CANC	76080389	395,000	#####	1999	1501		#####							
16	EXP	76081470	470,000	#####	2000	1708		#####							
17	CANC	71089974	380,000	#####	1983	1069	0.12	#####							
18	EXP	71096278	300,000	#####	1985	1154		#####							
19	EXP	81001505	355,000	1/6/2009	1981	1438		1/5/2008							
20	CANC	81004353	389,900	5/1/2008	1981	1588		1/16/2008							
21	ACT	81005619	540,000	2/9/2009	2000	1501		1/21/2008							
22	EXP	81032942	330,000	#####	1981	1120		4/15/2008							
23	ACT	81032998	329,900	2/7/2009	1980	1438	0.138	5/2/2008							
24	EXP	71020245	587,500	#####	1996	1519	0.3	3/11/2007							
25	EXP	71046958	475,000	#####	1995	1513	0.27	6/11/2007							
26	EXP	71033780	585,000	#####	1998	1723		4/23/2007							
27	EXP	76038345	575,000	#####	2000	1800	0.14	5/11/2007							
28	CANC	71045759	519,000	#####	2000	1776		6/6/2007							
29	CANC	71048190	459,000	4/7/2008	1979	1563		6/14/2007							

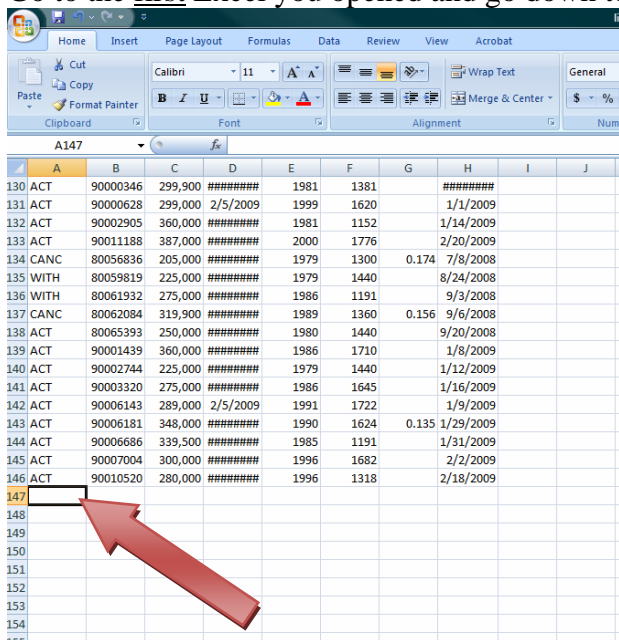
If you see ##### in some columns there is no need to worry. The column is too narrow to visually display the items – you can widen it if you’re curious and know how. You do not have to widen the columns.

Go back up to ** (Click on “Open”) and do exactly the same thing with the other exported data (remember we exported 2 sets of data) on your Desktop.

After you have the second set of data in Excel then starting at column/row A1 highlight all columns over to and including column J and down to the bottom of your data. Copy the highlighted data (Ctrl C or right click then “copy”). If you don’t know how to highlight and copy you need to ask someone for help – its easy, you just need to be shown how.



Go to the first Excel you opened and go down to the first box in the “A” column that is empty.



Click on that box and paste (Ctrl v or right click – Paste) the data you just copied from 2 paragraphs above. That will add data to what was already there. You now have the non-sold data and sold data on one spread sheet.

	A	B	C	D	E	F	G	H	I	J	K	L
130	ACT	90000346	299,900	*****	1981	1381						
131	ACT	90000628	299,000	2/5/2009	1999	1620		1/1/2009				
132	ACT	90002905	360,000	*****	1981	1152		1/14/2009				
133	ACT	90011188	387,000	*****	2000	1776		2/26/2009				
134	CANC	80056836	205,000	*****	1979	1300	0.174	7/8/2008				
135	WITH	80059819	225,000	*****	1979	1440		8/24/2008				
136	WITH	80061932	275,000	*****	1986	1191		9/3/2008				
137	CANC	80062084	319,900	*****	1989	1360	0.156	9/6/2008				
138	ACT	80065393	250,000	*****	1980	1440		9/30/2008				
139	ACT	90001439	360,000	*****	1986	1710		1/8/2009				
140	ACT	90002744	225,000	*****	1979	1440		1/12/2009				
141	ACT	90003320	275,000	*****	1986	1645		1/16/2009				
142	ACT	90006143	289,000	2/5/2009	1991	1722		1/9/2009				
143	ACT	90006181	348,000	*****	1990	1624	0.135	1/29/2009				
144	ACT	90006686	339,500	*****	1985	1191		1/31/2009				
145	ACT	90007004	300,000	*****	1996	1682		3/2/2009				
146	ACT	90010526	280,000	*****	1996	1318		2/18/2009				
147	SOLD	71023661	443,000	*****	2000	1708		3/23/2007	6/6/2007	*****		
148	SOLD	76024487	395,000	*****	1980	1240		3/26/2007	*****	*****		
149	SOLD	71017224	460,000	*****	2000	1501		3/1/2007	4/6/2007	*****		
150	SOLD	71020400	410,000	*****	1979	1360		3/10/2007	*****	*****		
151	SOLD	71057618	330,000	*****	1981	1120	0.138	7/18/2007	*****	*****		
152	SOLD	71064531	299,000	*****	1984	1053		8/11/2007	*****	*****		
153	SOLD	71065267	429,500	*****	2004	1772		8/14/2007	*****	*****		
154	SOLD	71074023	222,000	*****	2007	1200		9/17/2007	*****	*****		
155	SOLD	71081015	255,000	*****	1983	1053	0.14	*****	3/7/2008	5/6/2008		
156	SOLD	86013885	305,000	*****	1984	1053		2/21/2008	*****	*****		
157	SOLD	86023067	338,000	9/3/2008	2000	1511		3/17/2008	6/3/2008	*****		
158	SOLD	81036748	275,000	8/4/2008	1980	1120		4/25/2008	*****	8/1/2008		
159	SOLD	80043268	295,000	*****	1980	1260		6/18/2008	*****	*****		
160	SOLD	80049940	348,000	*****	2000	1501		7/15/2008	8/2/2008	*****		
161	SOLD	80056822	234,000	*****	1983	1069		8/12/2008	9/8/2008	*****		
162	SOLD	80081911	280,000	*****	1981	1260		12/9/2008	*****	*****		
163	SOLD	71041421	435,000	*****	1991	1679		5/21/2007	8/4/2007	9/5/2007		
164	SOLD	71049042	405,000	*****	1998	1501		6/18/2007	*****	*****		
165	SOLD	71054491	472,000	*****	1991	1679	0.26	7/7/2007	8/9/2007	*****		

We are almost done! Now with both sets of exported data in the Excel spreadsheet – start at column/row A1 and highlight **all columns over to and including column J** and **down to the bottom of your data**. Copy the highlighted data (Ctrl C or right click then “copy”).

Remember where you downloaded Don’s Program. Click on Don’s (Excel) Program (some thing like : “Spreadsheet for the 1004MC 4a”) (depending on the current version) (do not use the 4b version). This will open another Excel program window. Find the box which says “Paste Here” (left side about half way down) – click on the box and Paste (Ctrl v or right click and Paste) the data you just copied into that box.

Spreadsheet_for_the_1004_MC_4a [Compatibility Mode] - Micro

Home Insert Page Layout Formulas Data Review View Acrobat

Arial 10

General

Clipboard Alignment Number

A24 Paste Here

Spreadsheet for the 1004 MC 4a

1 Don Machholz (530) 320-8204 3/11/2009 Freeware dontheappraiser@aol.com P.O. Box 1716, Colfax

2 An Excel Tool to sort MLS data for input into the 1004 MC form. This spreadsheet is also good for MLSs where status date is incorrect. It produces 10

3 1) Save file to new name. 2) Copy and paste MLS information into grids in the first 10 (or 11) columns, getting homes of all status, including withdrawn.

4 3) Only the columns with an * need to be filled in for this form to work, but you will find the other columns helpful. 4) Do not delete the rows under your c

5 5) For MLS where the Status Date is incorrect (and "Off Market Date" is unavailable), follow the steps in box E17. 6) If the date in Box B13 is incorrect,

6 7) Add your file # or address, and any notes in boxes B10 and B11. 8) Outputs are on the next two pages (see tabs on bottom left of page), which you

7 9) Probable trends are suggested for the appraiser at the right of the table. 10) Data for the top of page two of the URAR is also presented below the Re

8 This 4a spreadsheet reflects the changes made to the 1004MC form by FNMA on March 11, 2009

9

10 Address/File #: City Name or File Name

11 Notes:

12 If the date in Box B13 is incorrect, type in the correct date

13 Date of Value: 3/29/2009 39902

14 12 Months ago 3/29/2008 39537

15 6 Months ago 9/27/2008 39719

16 3 Months Ago 12/28/2008 39811

17 Note: For MLSs where the status date is inaccurate, or "Off Market Date" is

18 1/0/1900 paste the DOM into column K, then copy and paste box D18 over the I

19

20 Min: \$325,000 4/10/08 1998 1975 0.1 3/19/07 3/31/08 4/10/08

21 Max: \$325,000 4/10/08 1998 1975 0.1 3/19/07 3/31/08 4/10/08

22 Average: \$325,000 04/10/08 1998 1975 0.10 03/19/07 03/31/08 04/10/08

23 Status * Address Price * Status Date Yr Built SF Acres Listing Date ending Date Sale Date *

24 Paste Here 8 Stanford Village Ct Rockl \$325,000 4/10/2008 1998 1975 0.1 3/19/2007 3/31/2008 4/10/2008

25 Placeholder

26 Placeholder

27 Placeholder

28 Placeholder

29 Placeholder

30 Placeholder

31 Placeholder

Don's Program does the rest. There are a bunch of numbers off the page to the right – scroll over if you like – BUT the meat of what you want is at the bottom of the page on the Results tab and 1004MC tab.

The easiest way of getting the data into your appraisal software is by copying it manually (i.e. look at Don's 1004MC and type the pertinent info onto your appraisal software 1004MC).

* * *

Warning Do a "Save As" with your file name if you are going to save the data. If you just save - you overwrite the blank grid in Don's Program – remember I suggested making a copy of Don's program just after you downloaded it in case you mess up.

Some additional comments -

In Don's Program column "B" shows address - but we put in the MLS#. If you use an address be sure it doesn't contain a comma or bad things will happen.

You may want to exclude Pending sales and Backup Offer - as a lot of the time you don't know the actual pending sales price for all the pending sales and it doesn't expressly ask for pending sales.

If/when you do Condos or 1-4 Residential Units you may have to set up new templates.

Delete the exported text (2 files) on your desktop.

Keep in mind the 1004MC is a poorly written form which does not give the reader a clear picture of the market and asks for comparable data - but says the data should reflect what is in the neighborhood section of the 1004 - the comparable data may be only a subset of the overall neighborhood on the first page of the appraisal and that is going to confuse some underwriters/reviewers.

DOM is calculated to the pending date on closed sales.

* * *