Matrix

Prospect and Client Management

California Regional Multiple Listing Service, Inc.

For Support: (800) 925-1525

Support Hours:
M-F 8:30 AM – 9:00 PM
Sat-Sun: 10:00 AM – 3:00 PM
www.crmls.org/support

Contents

Managing Contacts

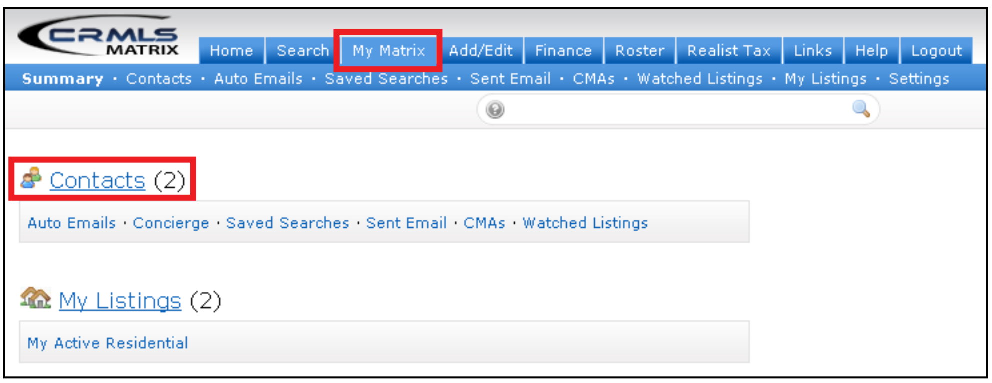
Follow the steps in these sections to add and manage contacts in the CRMLS Matrix Platform:

- “Adding Contacts” below
- “Viewing Contacts” on page 6
- “Managing Contacts” on page 8

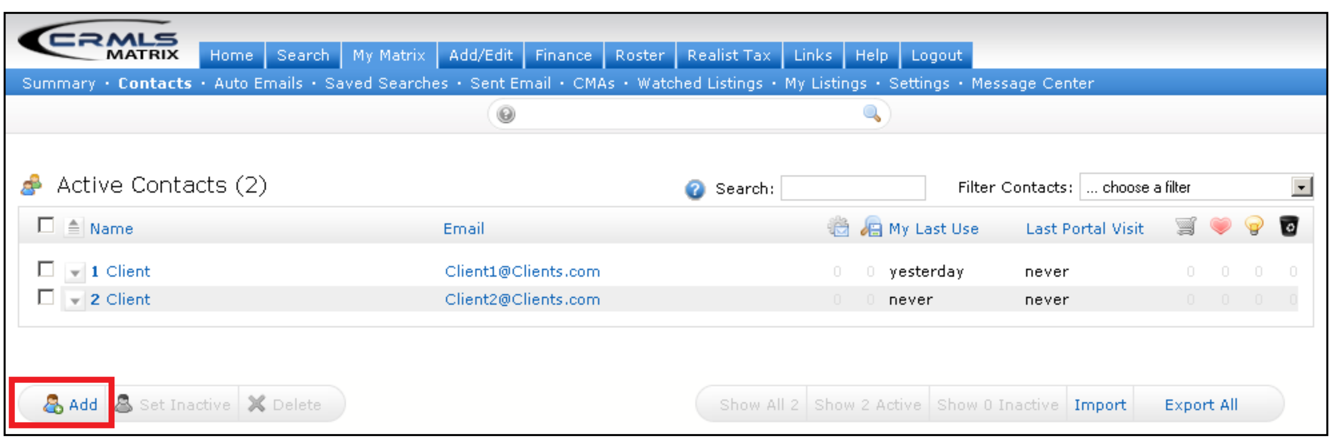
Adding Contacts

Follow the steps below to add contacts to the CRMLS Matrix Platform.

1. Click the **Contacts** link on the **My Matrix** tab.

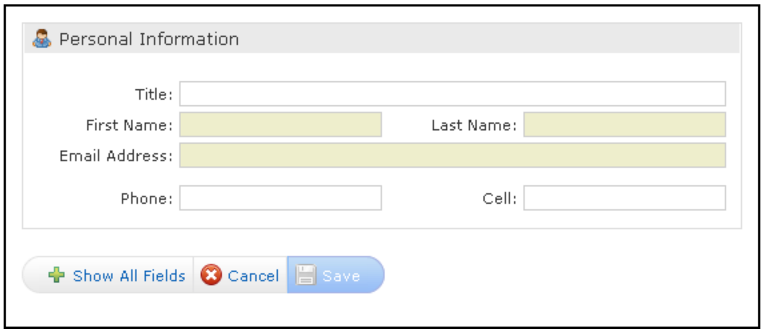


2. Click **Add** to add a new contact.



Note:
To add multiple contacts at once, see “Importing Multiple Contacts” on page 4.

3. Enter your client's contact information in the available fields. Required fields are highlighted in yellow.



> ***Note:***
> *To add a contact's home address, business address, or to add notes about the contact, click **Show All Fields**.*

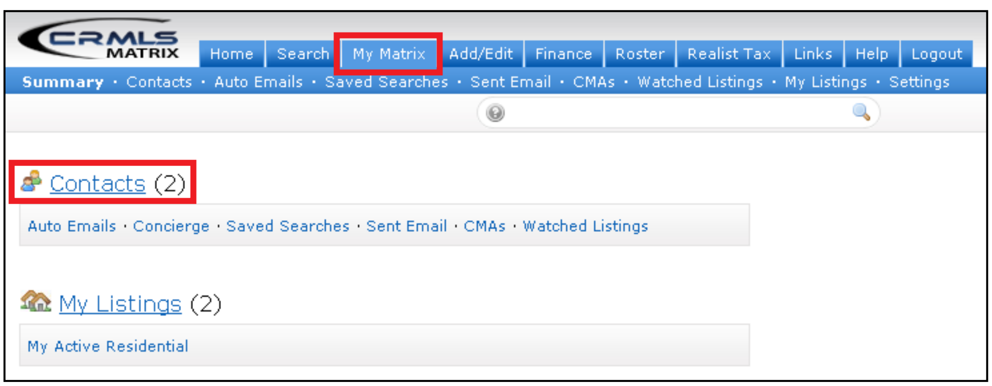
4. Click **Save** to save your client's contact information.

Importing Multiple Contacts

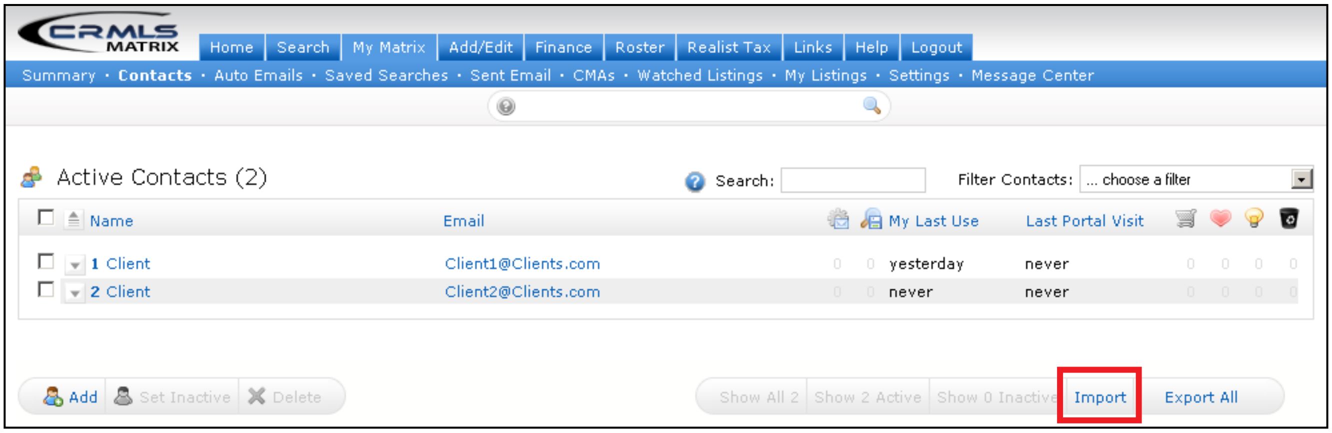
Before you begin, make sure that you've exported your contacts from Microsoft Outlook in Comma Separated Values (Windows) format. Then follow the steps below to import your contacts.

Note:
Contacts that do not contain a first name, last name, or email address will not be imported.

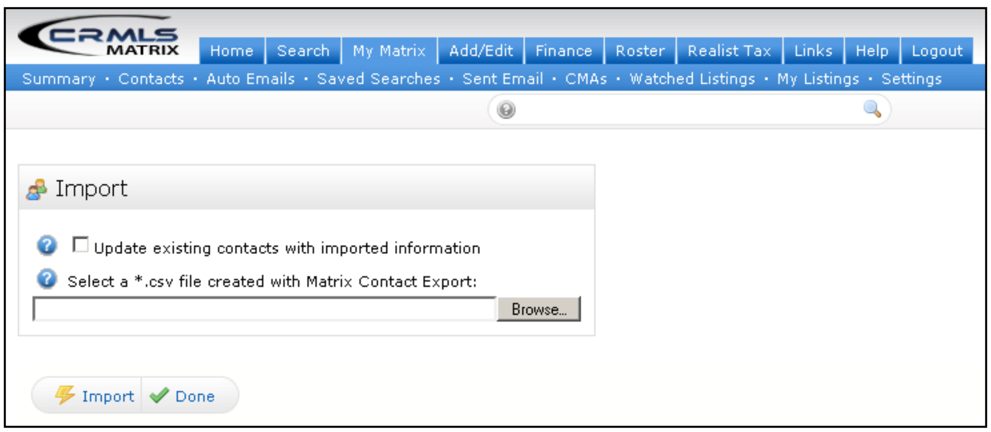
1. Click the **Contacts** link on the **My Matrix** tab.



2. Click **Import**.



3. Click **Browse** to locate the CSV file that you exported from Microsoft Outlook.



Note:
*To update existing contacts with the information in your CSV file, click the **Update existing contacts with imported information** checkbox.*

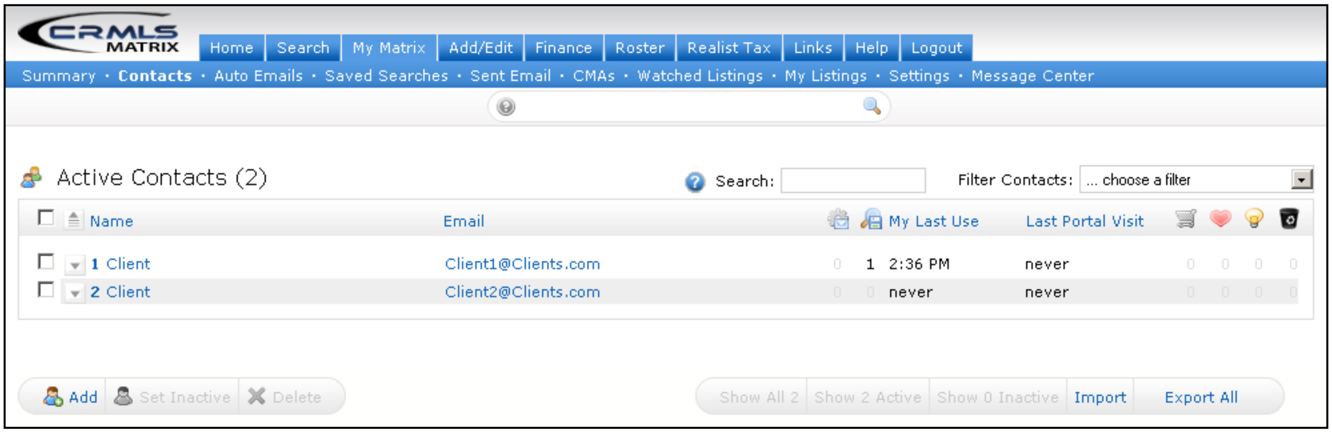
4. Click **Import** to import your contacts.

5. When the import is complete, you see the results of the import. Click **Done** to return to the Contacts page.

Viewing Contacts

To view your contacts, click the **Contacts** link on the **My Matrix** tab.

To view a contact's details, click the triangle next to the contact's name.



To sort your contacts alphabetically, click the **Name** link.

To search for a contact, type a name in the **Search** field.

To narrow down your contacts, select one of the following options in the **Filter Contacts** drop-down menu:

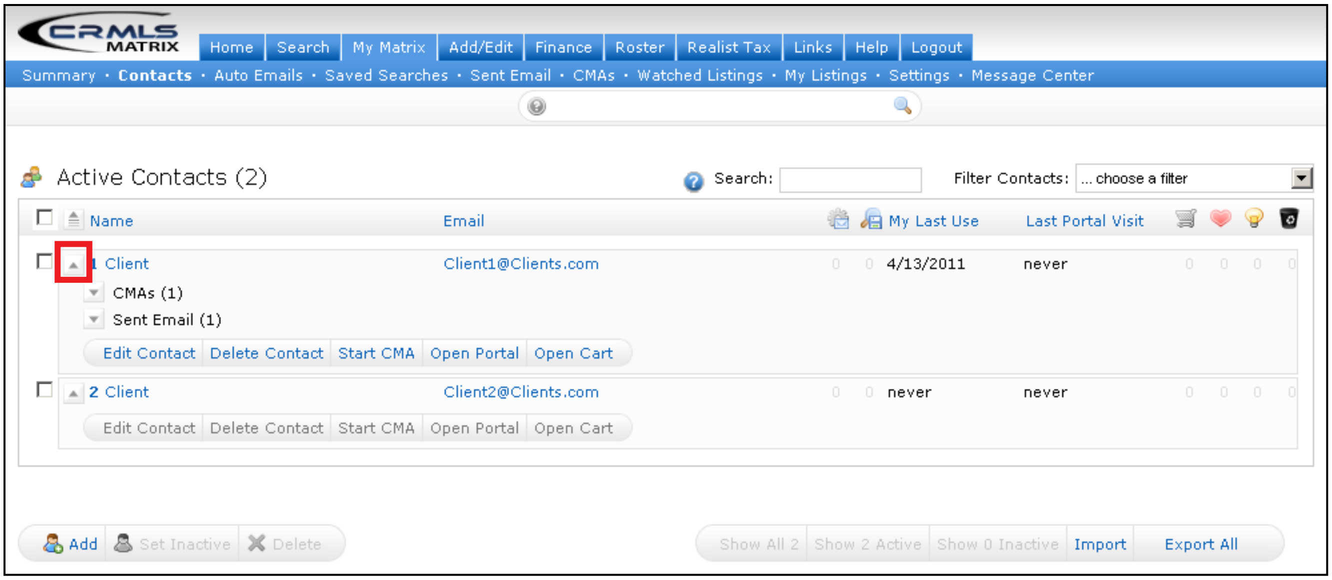
- **with active auto emails** displays all contacts with active auto emails
- **with inactive auto emails** displays all contacts with inactive auto emails
- **with no auto emails** displays all contacts that do not have an auto email
- **who have visited their portal** displays all contacts that have visited their client portal
- **who have not visited their portal** displays all contacts that have not visited their client portal
- **I haven't worked with** displays all contacts that you haven't worked with for a specific amount of time
- **who have saved searches** displays all contacts that have a saved search assigned to them
- **who have no saved searches** displays all contacts that do not have a saved search assigned to them

For a list of contact icons and their descriptions, refer to the table below:

Icon	Description
	Displays which contacts have active Auto Email.
	Displays which contacts have Saved Searches.
My Last Use	Displays the date that you last worked with a client in the CRMLS Matrix Platform.
Last Portal Visit	Displays the date that your Contact opened their Auto Email or direct email.
	Displays the number of listings in the client's cart.
	Displays the number of Favorites your client has selected.
	Displays the number of listings your client selected as Possibilities.
	Displays the number of listings that were Discarded by your client.

Managing Contacts

From the Contacts page, click the triangle next to a contact to view items assigned to your contact.



Now you can do the following:

- Click the **Edit Contact** button to update the selected contact's information.

  Note:
  *To update the contact's home address, business address, or notes about the contact, click the **Show All Fields** button in the Personal Information window.*

- Click the triangle next to Auto Emails to view and edit auto-email settings for your client. (See "Managing Auto Emails" on page 28 for details.)
- Click the triangle next to Saved Searches to view and edit previously saved searches. (See "Managing Saved Searches" on page 19 for details.)
- Click the triangle next to CMAs to view, edit, and delete previously saved CMAs.
- Click the triangle next to Sent Email to view Direct Email, Auto Email and CMAs along with their respective view history and content. (See "Viewing Sent Email History" on page 39 for details.)
- Click the checkbox next to a contact and click **Delete Contact** to remove the selected contact.
- Click the checkbox next to a contact and click the **Set Active** or **Set Inactive** button to change the selected contact's status to Active or Inactive.

Customizing Email Settings

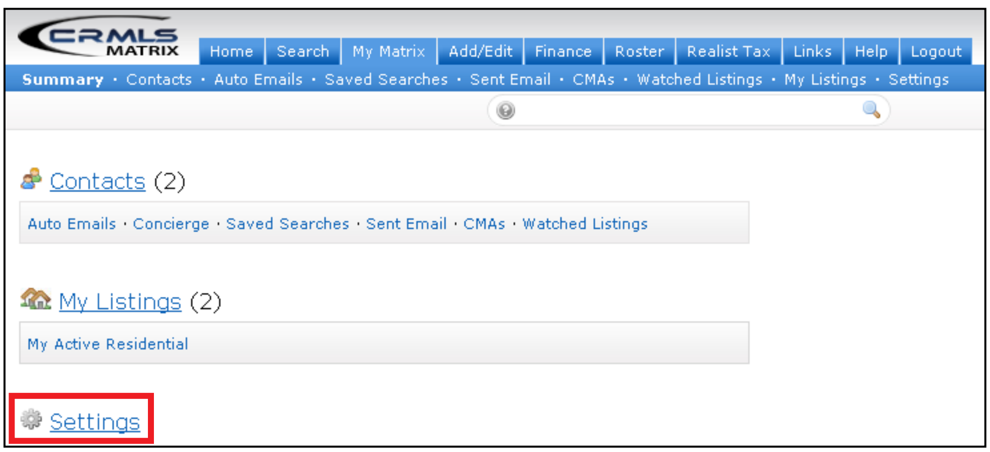
Before you send emails to your clients, you should create an email signature and customize your header/footer for the Client Portal and printed reports. Follow the steps in these sections to get started:

- “Creating an Email Signature” on page 9
- “Customizing Your Header/Footer” on page 10

Creating an Email Signature

When you send an email from the CRMLS Matrix Platform, your email signature will appear at the bottom of the email. Follow the steps below to create an email signature in CRMLS Matrix.

1. Click **Settings** on the My Matrix tab.



2. Enter your Email Signature.

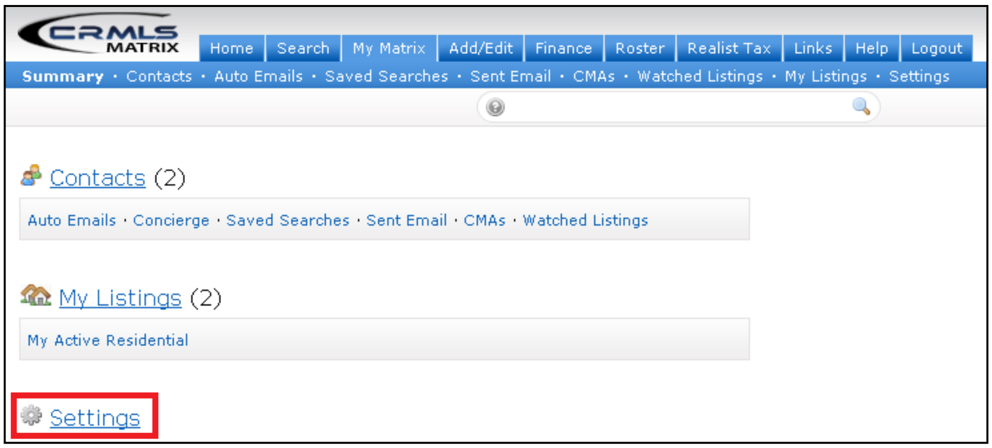
3. Click the **English** Check Spelling link to spell check your email signature.

4. Click **Save Email Signature** when you're done entering your email signature.

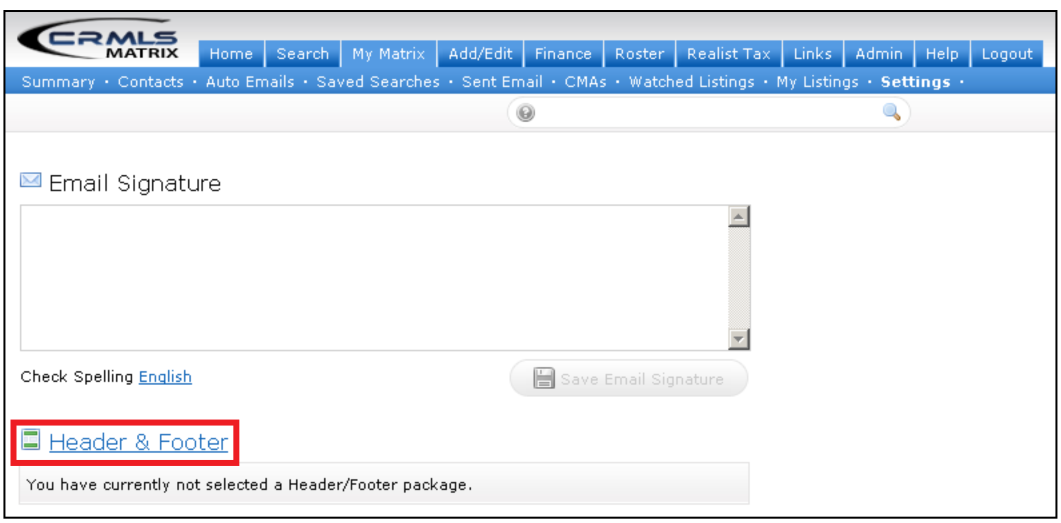
Customizing Your Header/Footer

The CRMLS Matrix Platform allows you to customize the header and footer that's appended to emails and on your print displays. The Header and Footer give you the ability to add a custom picture, logo, motto, and personal contact information on any listing display in Matrix.

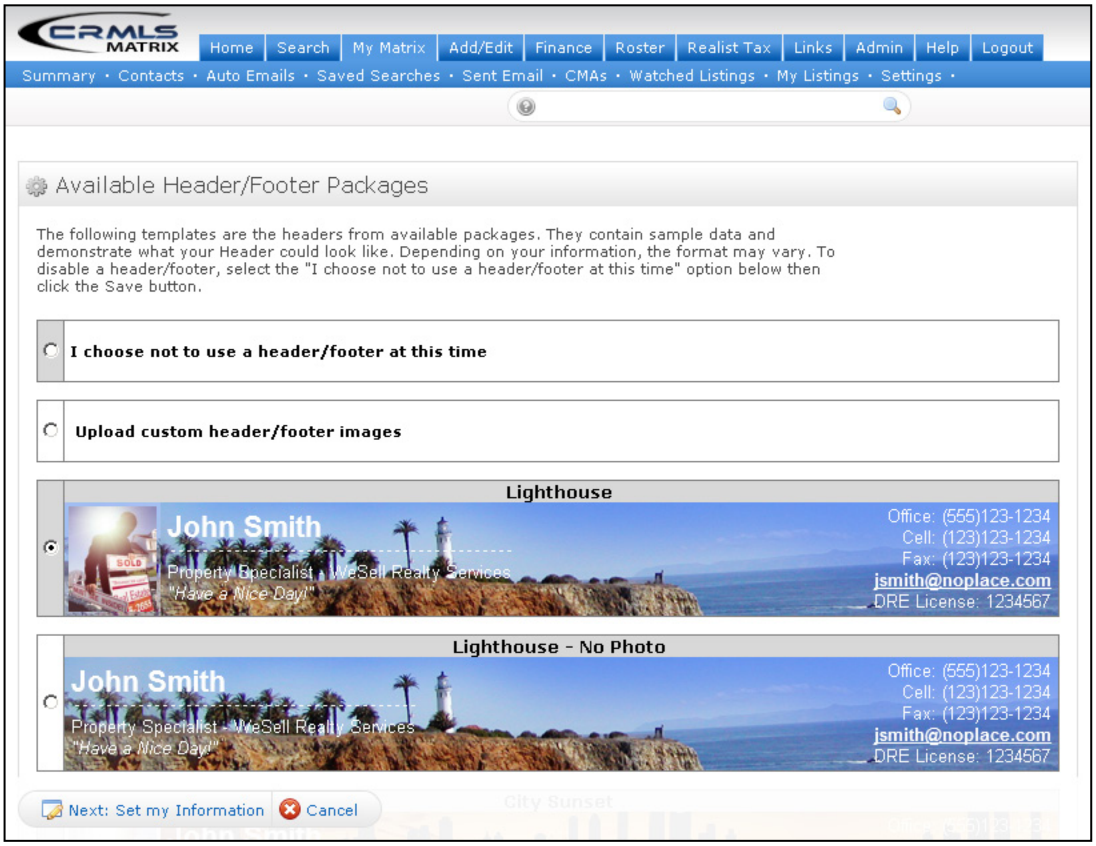
1. Click the **Settings** link on the My Matrix tab.



2. Click the Header & Footer link.



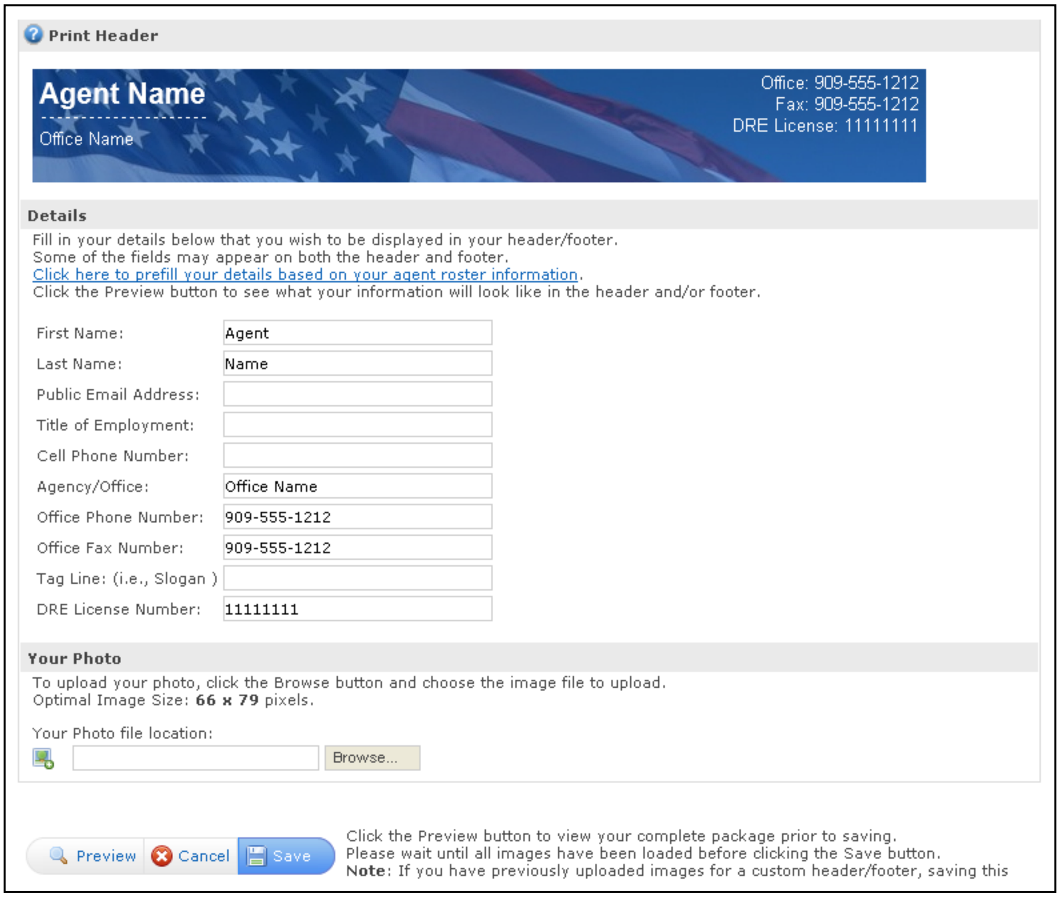
3. Select one of the Available Header/Footer Packages. Select the a header/footer with the No Photo option if you don't want to include your photo in the header/footer.



4. Click the **Next: Set my Information** button when you're done selecting a header/footer package.

5. Scroll down to the Details section and click the **Click here to prefill your details** link to pre-fill your contact information from the Matrix roster or manually enter you contact information.

   The information you enter will be displayed on all of your client portal and report headers and footers.



6. If you selected a header/footer that allows you to include your photo, click the **Browse** button.
7. Locate and select the photo you want to upload.
8. Click the **Preview** button to preview your header and footer.
9. Click the **Save** button to save your header and footer.

Emailing Listings Directly

The CRMLS Matrix Platform allows you to email listing reports or links to listings, for display in the Client Portal, directly from the search results page. Follow the steps in these sections to get started:

- “Emailing Listings for Display in the Client Portal” below
- “Emailing listings as a PDF Report” on page 15

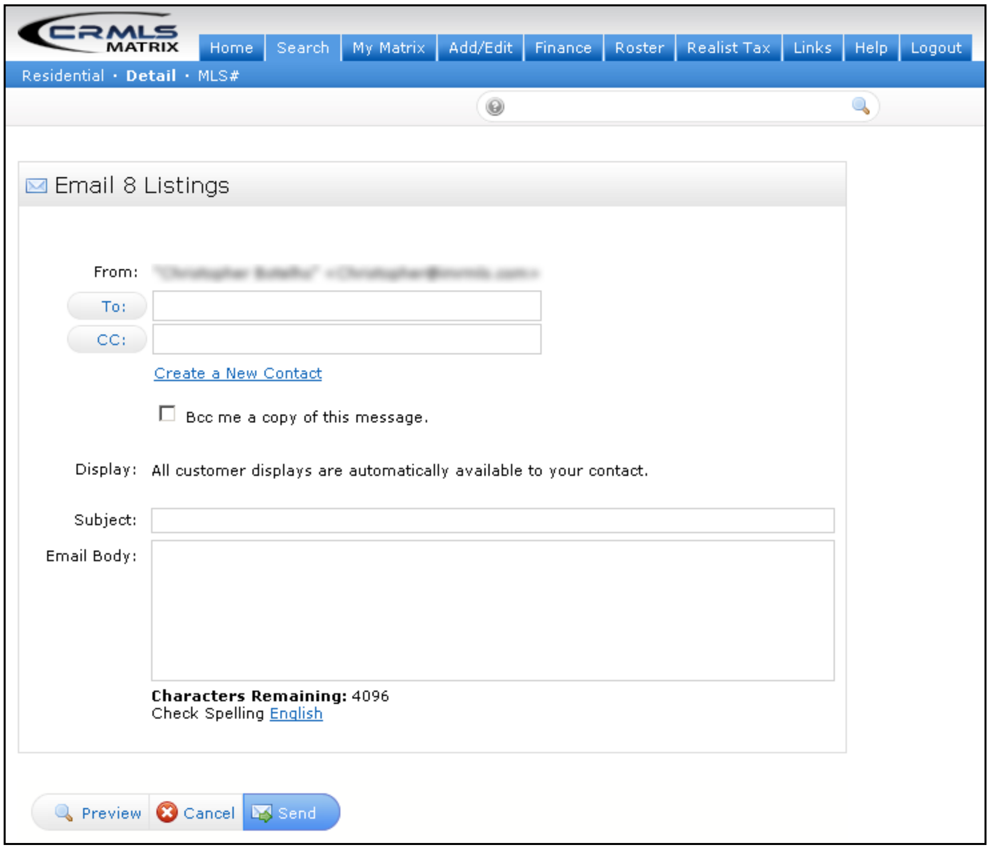
Emailing Listings for Display in the Client Portal

1. Click the checkbox next to each listing you want add to your client’s Portal.
2. Click the **Email** button.

3. Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's e-mail address in the **To:** field.

   Note:

   - *To select more than one contact, hold down the **CTRL** key on your keyboard as you select them.*
   - *If your e-mail address doesn't appear in the From: field, you will need to add your e-mail address to your CRMLS Matrix account. Click the **Add/Edit** tab, type your Agent ID in the **Quick Modify** field under Roster, then click the **Edit** link.*



4. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you're sending.
5. Enter a subject for the e-mail in the **Subject** text field.
6. Enter a message for your client in the **Email Body** text field. You can enter up to 4096 characters in the Email Body text field.
7. Click the **English** link to spell check the message you typed in the Email Body text field.
8. Click the **Preview** button to preview the email message before sending it to your client.
9. Click the **Send** button to send the selected listings to your client.

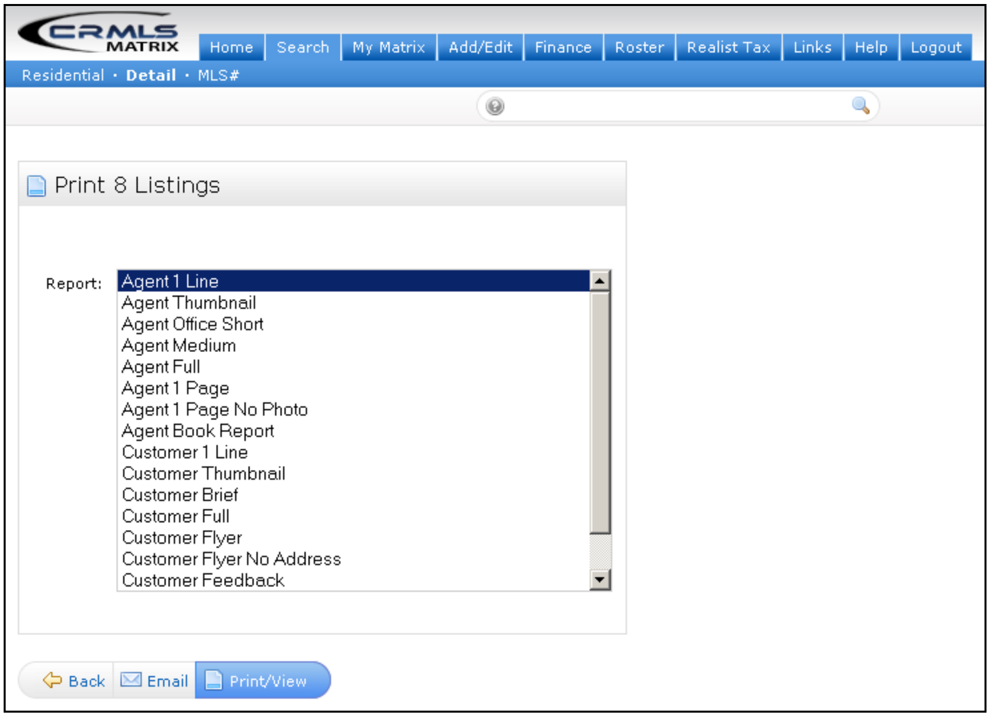
Emailing listings as a PDF Report

Follow the steps below to email listing reports. Before you begin, make sure that you've performed a search and are on the search results page.

1. Click the checkbox next to each listing you want to email in a report.
2. Click the **Report** button.

3. Select the report you want to email.

   To select more than one report, hold down the **CTRL** key on your keyboard as you select the reports you want to email.

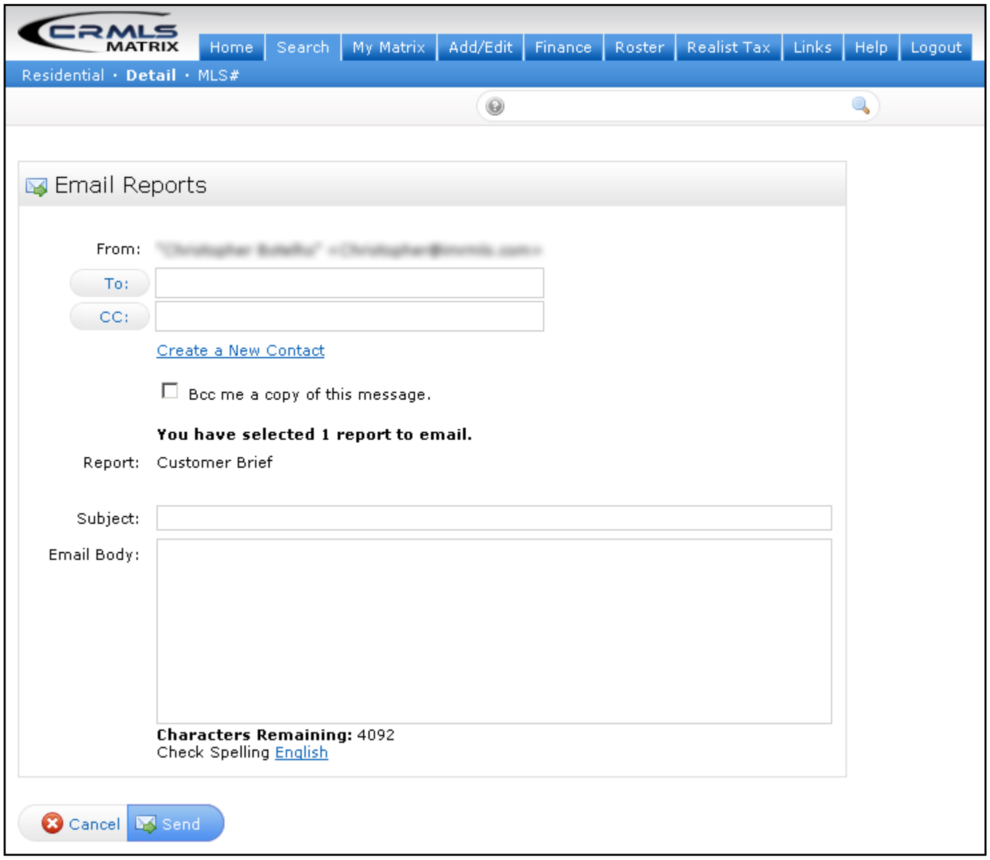


Note:

- *To preview the Report, click the **Print/View** button.*
- *The Agent Full, Agent 1 Page, and Agent Book reports are not available to email.*

4. Click the **Email** button.

5. Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's e-mail address in the **To:** field.



Note:

- *To select more than one contact, hold down the **CTRL** key on your keyboard as you select them.*
- *If your e-mail address doesn't appear in the From: field, you will need to add your e-mail address to your CRMLS Matrix account. Click the **Add/Edit** tab, type your Agent ID in the **Quick Modify** field under Roster, then click the **Edit** link.*

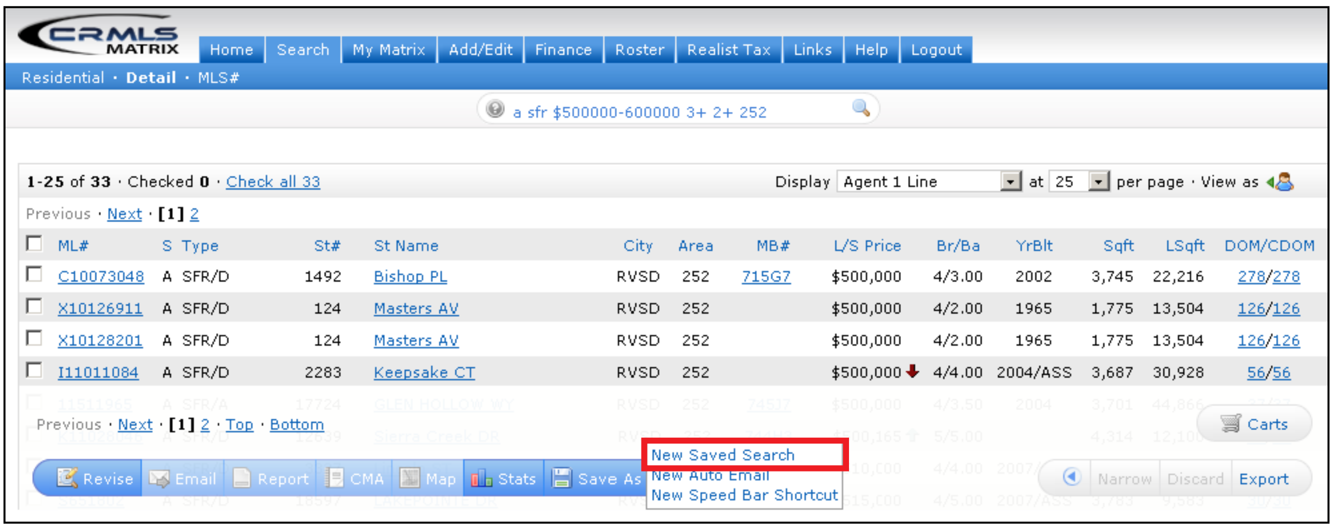
6. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you're sending.
7. Enter a subject for the e-mail in the **Subject** text field.
8. Enter a message for your client in the **Email Body** text field. You can enter up to 4096 characters in the Email Body text field.
9. Click the **English** link to spell check the message you typed in the Email Body text field.
10. Click the **Preview** button to preview the email message before sending it to your client.
11. Click the **Send** button to send the selected report to your client in PDF format.

Saving Searches

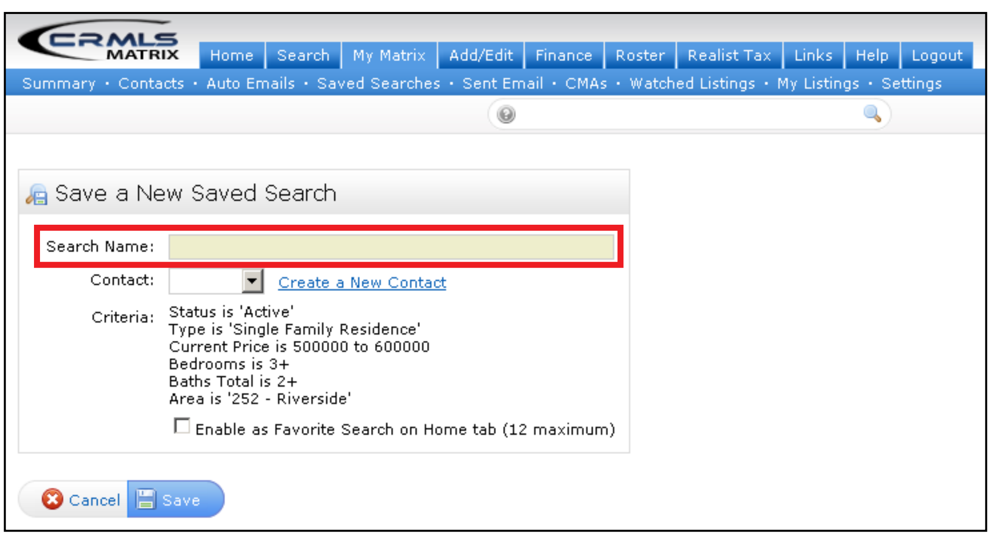
Saved searches allow you to set up customized search criteria for each of your clients. You can also use saved searches as a base for creating Auto Emails and Favorite Searches.

Saving a Search

1. From the Search results page, click the **Save As** button.
2. Select **New Saved Search** from the pop-up Menu.



3. Type a name for your search in the Search Name field.



4. To assign this search to a client, select a client from the Contact drop-down list.

   Note:
   If the contact you're looking for isn't in the contact list, you can add a new contact by clicking the ***Create a New Contact*** *link.*

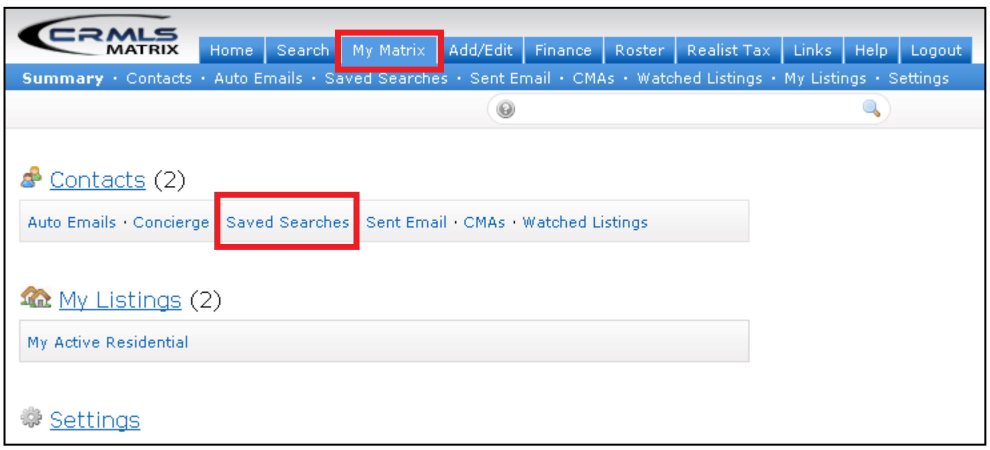
5. To add the search to the My Favorite Searches widget on the Matrix Home tab, click the **Enable as Favorite Search** checkbox.

6. When you're done, click **Save** to save your search.

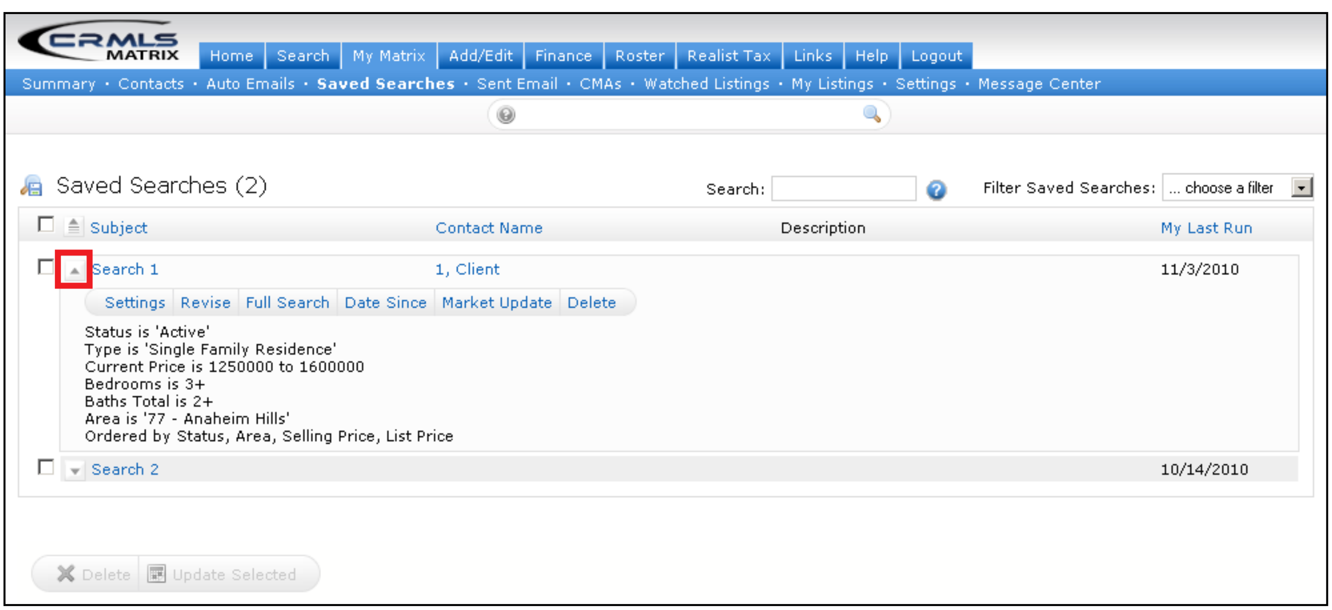
Managing Saved Searches

Follow the steps below to manage your saved searches.

1. From the My Matrix tab, click **Saved Searches**.



2. Click the triangle next to a saved search to display search options.



3. To manage your saved search, do the following:
    - Click **Settings** to change the Search Name, Description, Primary Contact, and to enable/disable Favorite Searches and Auto Emails.
    - Click **Revise** to update your search criteria.
    - Click **Full Search** to run the saved search.
    - Click **Date Since** to run the saved search and only display new results from the last date and time you ran the saved search.
    - Click **Market Update** to run a search with a specified date range or from the last date you ran the search.

    Note:
    Use the Filter Saved Searches drop-down list to quickly sort and find your saved searches.
4. To delete a saved search, click **Delete**.

Emailing Listings Automatically

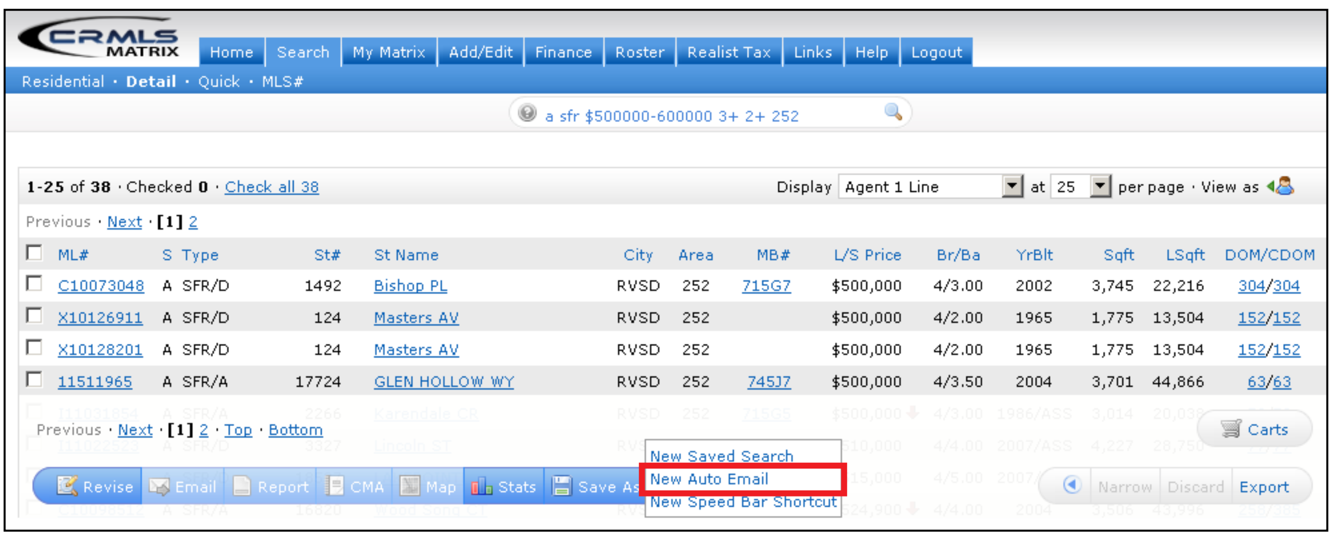
Automatic emails allow you to quickly and easily turn your saved searches into automatic email updates that instantly notify your clients of new and changed listings. Before you begin, make sure that you've created an email signature and set up your header/footer information as described in "Emailing Listings Directly" on page 13. Then follow the steps in these sections to get started:

- "Creating Auto Emails from Search Results" on page 21
- "Creating Auto Emails from a Saved Searches" on page 24
- "Managing Auto Emails" on page 28

Note:
For complete control over the listings that are sent to your clients, enable concierge mode for your auto emails to approve or reject listings before sending them to your client. See "Auto Email Concierge" on page 30 for details.

Creating Auto Emails from Search Results

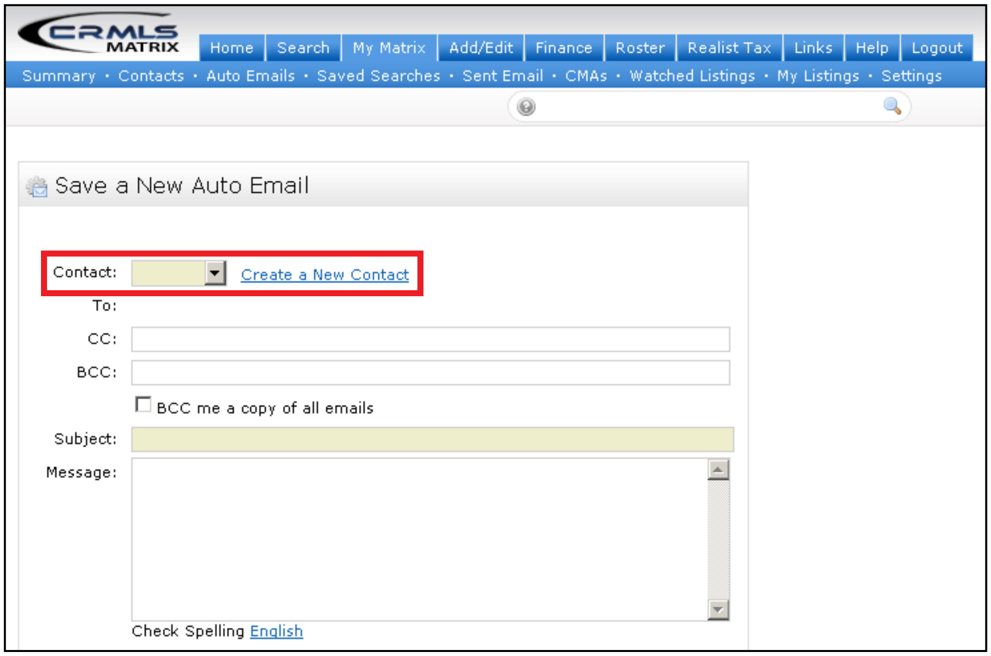
1. Once you have run your search and are on the results page, click the **Save As** button, then select **New Auto Email** in the pop-up menu.



Note:
You can also create Auto Emails from Saved Searches. For more information, see "Creating Auto Emails from a Saved Searches" on page 24.

You can enable up to 250 Auto Emails and have an unlimited number of saved searches.

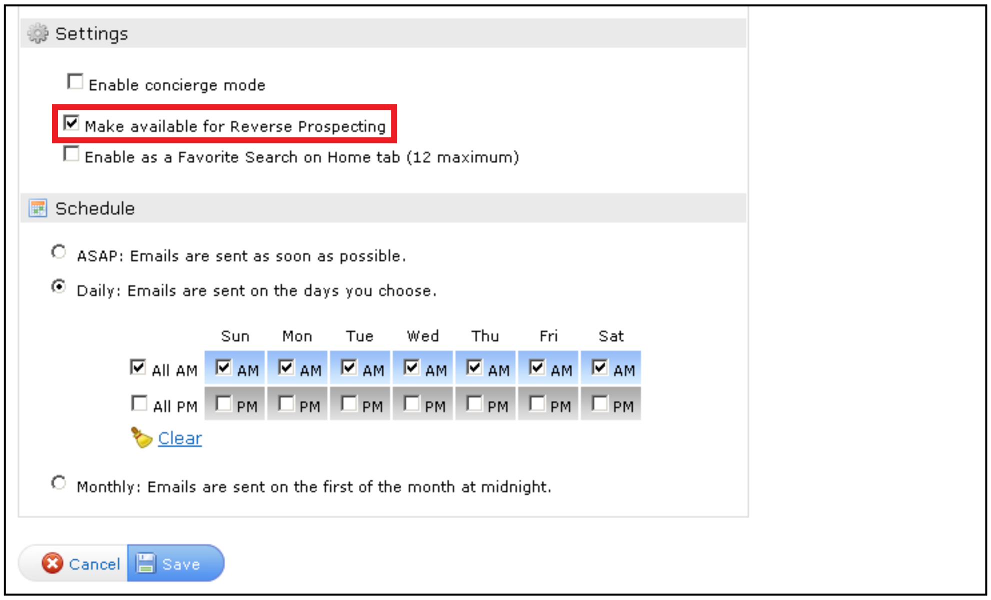
2. On the Save a New Auto Email page, select a contact from the **Contact** drop-down list to assign the auto email to an existing contact. To add a new contact, click the **Create a New Contact** link, then see follow the prompts on the screen.



3. Enter a subject for the email in the **Subject** field.
4. Select **BCC me a copy of all emails** to receive a blind carbon copy of auto emails sent to the client.
5. If you want to send the auto email to an additional email address, the address in the **CC:** field.
6. If you want to send the auto email to an additional email address without the client seeing who it was sent to, enter the address in the **BCC:** field.
7. CRMLS Matrix will automatically populates the message field. If you want to add a personal message before the auto populated text, enter it in the **Message** field.

   Note:
   When sending the initial auto email to a client, you should leave the Message field blank. This will send out a message welcoming your client to the Portal and provide them with general information on how to work with the Portal.

8. Select **Make available for Reverse Prospecting** to allow a listing agent to see if their listing was sent in an auto email.



> ***Note:***
> *For* complete control over listings sent to your clients when using the Auto Email feature, refer to "Auto Email Concierge" on page 30.

9. Select **Enable as a Favorite Search** to add the search to the Favorites Searches list on the CRMLS Matrix Home tab.

10. Select a Schedule setting to specify when auto emails are sent to your client. The **Daily** setting allows to send emails every day at 8:00AM or 6:00PM, the **ASAP** setting sends auto emails as soon as possible, and the **Monthly** setting sends emails at midnight on the first of the month.

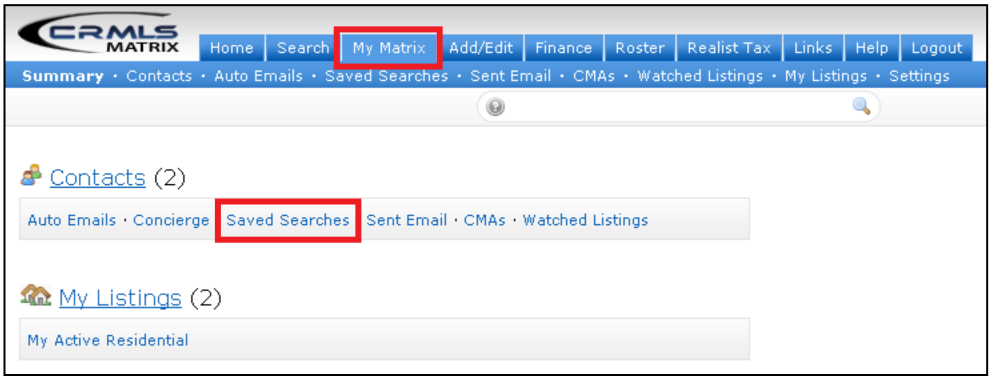
11. Click the **Save** button to save your Auto Email.

Note:
If your Auto Email returns more than 250 listings, you will receive a message letting you know that your Auto Email has been disabled. To reactivate your auto email, access your Saved Search in the My Matrix tab, narrow your search criteria, and re-activate the Auto Email. If necessary, you can set up multiple saved searches for a single client.

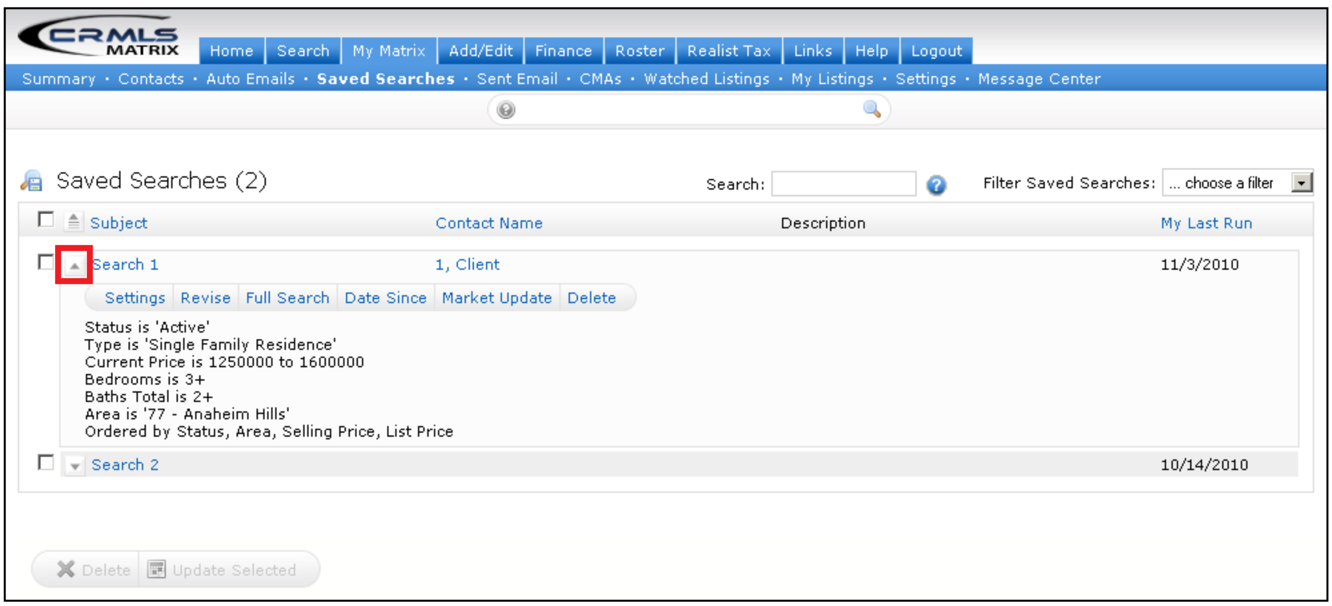
Creating Auto Emails from a Saved Searches

Follow the steps below create an Auto Email from a Saved Search.

1. Click the **Saved Searches** link on the **My Matrix** tab.

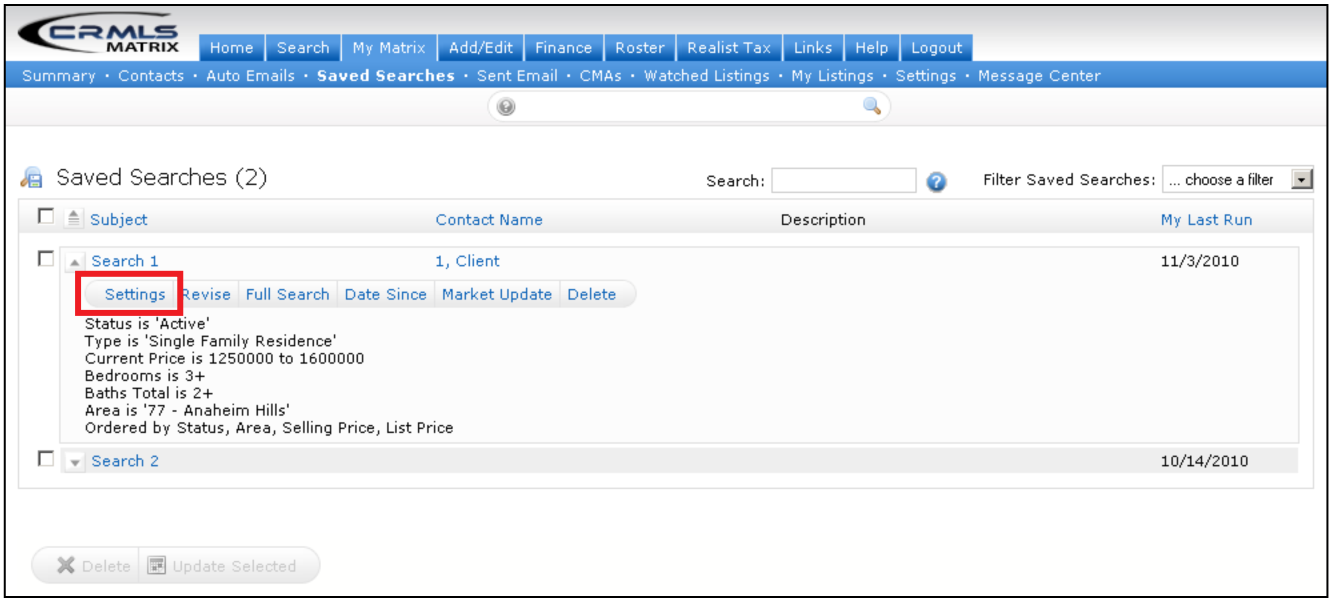


2. Located the saved search you want to turn into an Auto Email notification.
3. Click the triangle next to the saved search to display saved search options.

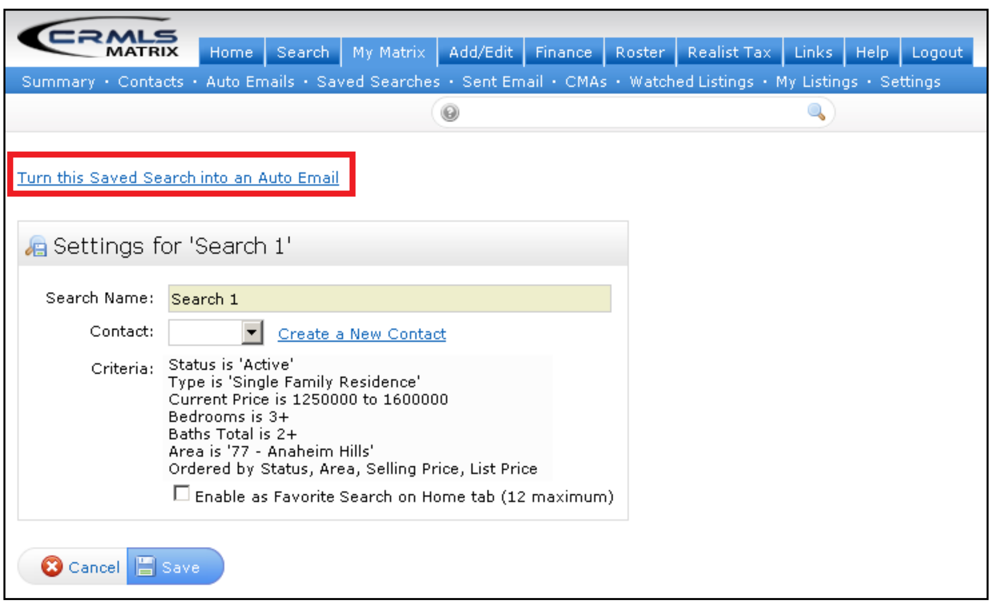


Note:
If you have a lot of saved searches, you can filter them using the ***Filter Saved Searches*** *drop-down menu.*

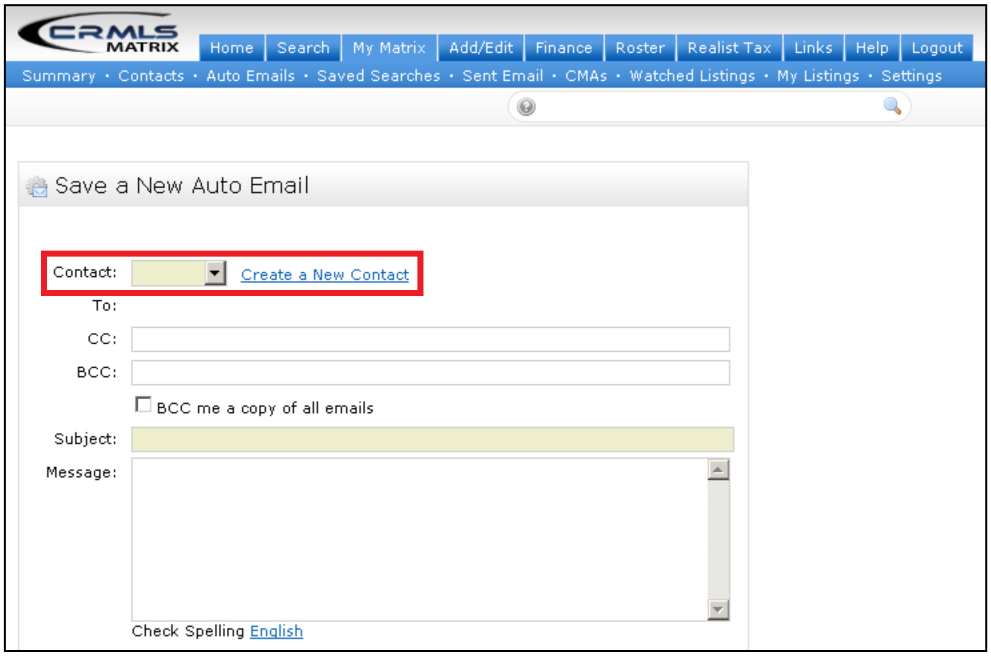
4. Click the **Settings** button.



5. Click the **Turn this Saved Search into an Auto Email** link.



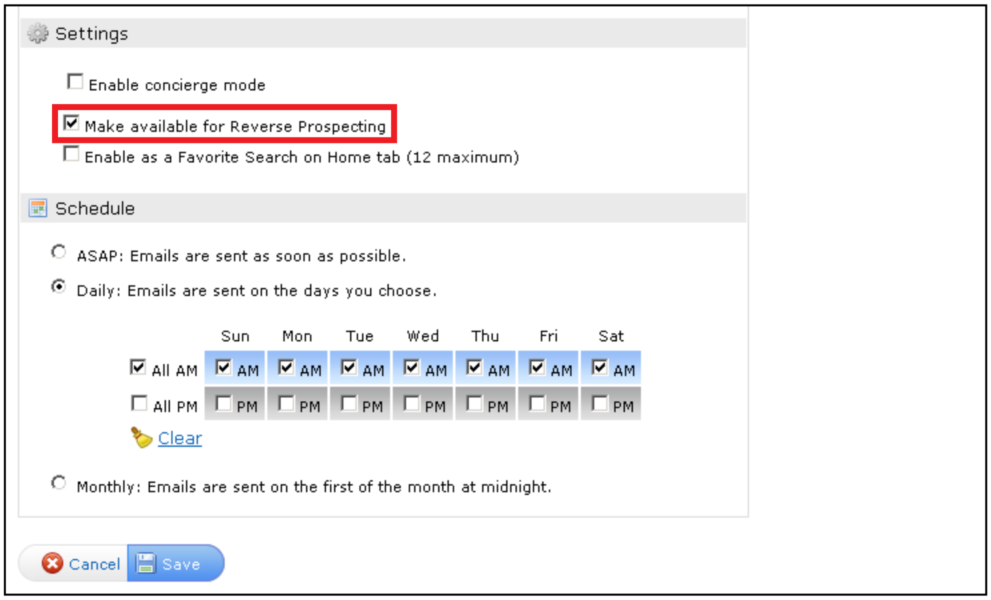
6. On the Save a New Auto Email page, select a contact from the **Contact** drop-down list to assign the auto email to an existing contact. To add a new contact, click the **Create a New Contact** link, then see follow the prompts on the screen.



7. Enter a subject for the email in the **Subject** field.
8. Select **BCC me a copy of all emails** to receive a blind carbon copy of auto emails sent to the client.
9. If you want to send the auto email to an additional email address, the address in the **CC:** field.
10. If you want to send the auto email to an additional email address without the client seeing who it was sent to, enter the address in the **BCC:** field.
11. CRMLS Matrix will automatically populates the message field. If you want to add a personal message before the auto populated text, enter it in the **Message** field.

    Note:
    When sending the initial auto email to a client, you should leave the Message field blank. This will send out a message welcoming your client to the Portal and provide them with general information on how to work with the Portal.

12. Select **Make available for Reverse Prospecting** to allow a listing agent to see if their listing was sent in an auto email.



Note:
For complete control over listings sent to your clients when using the Auto Email feature, refer to "Auto Email Concierge" on page 30.

13. Select **Enable as a Favorite Search** to add the search to the Favorites Searches list on the CRMLS Matrix Home tab.

14. Select a Schedule setting to specify when auto emails are sent to your client. The **Daily** setting allows to send emails every day at 8:00AM or 6:00PM, the **ASAP** setting sends auto emails as soon as possible, and the **Monthly** setting sends emails at midnight on the first of the month.

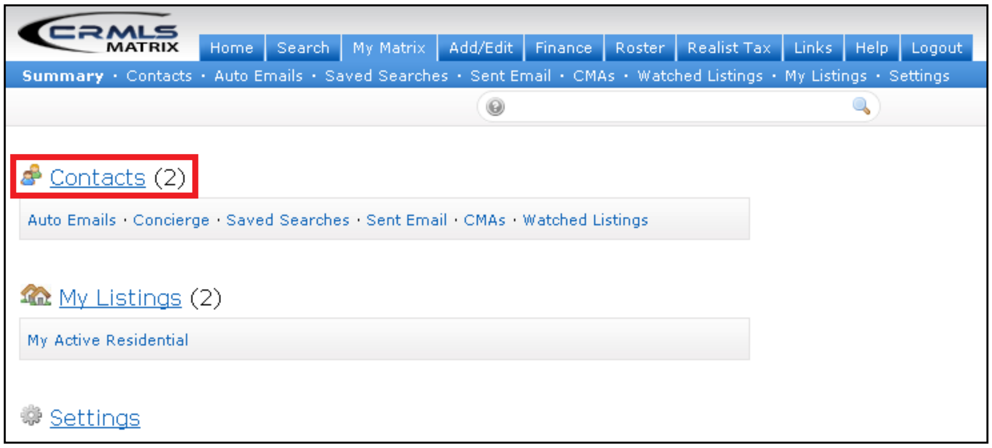
15. Click the **Save** button to save your Auto Email.

Note:
If your Auto Email returns more than 250 listings, you will receive a message letting you know that your Auto Email has been disabled. To reactivate your auto email, access your Saved Search in the My Matrix tab, narrow your search criteria, and re-activate the Auto Email. If necessary, you can set up multiple saved searches for a single client.

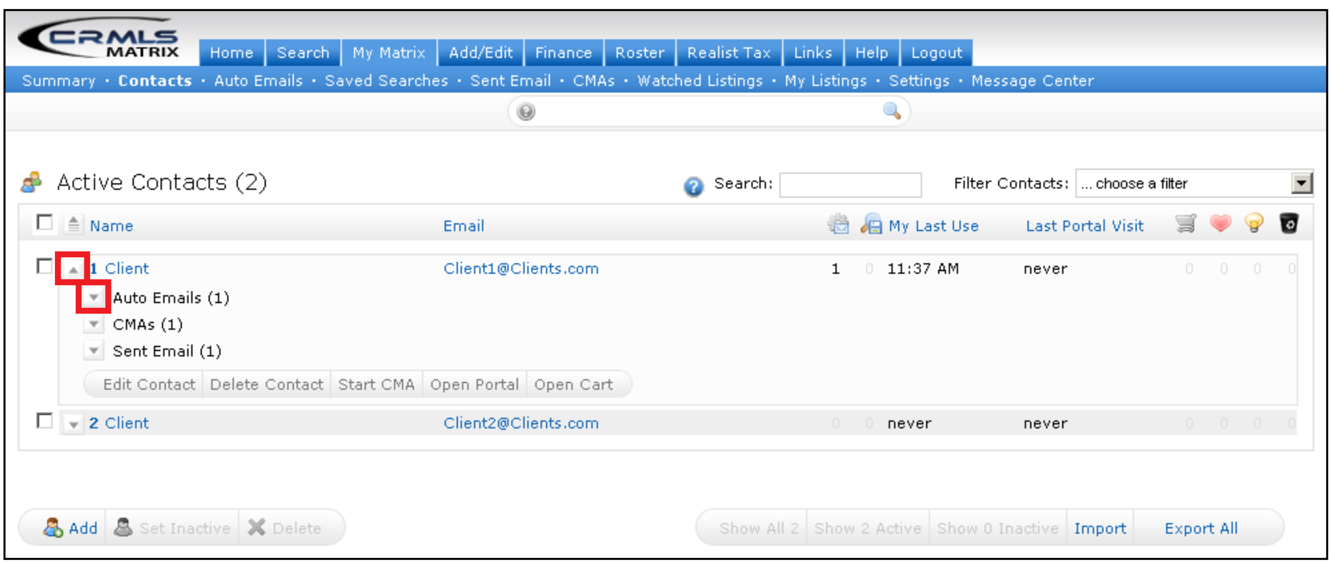
Managing Auto Emails

Auto Emails are created by an agent for clients who wants to receive automatic email notifications of listings that match specific criteria. Follow the instructions below to manage Auto Emails.

1. From the My Matrix tab click the **Contacts** link.



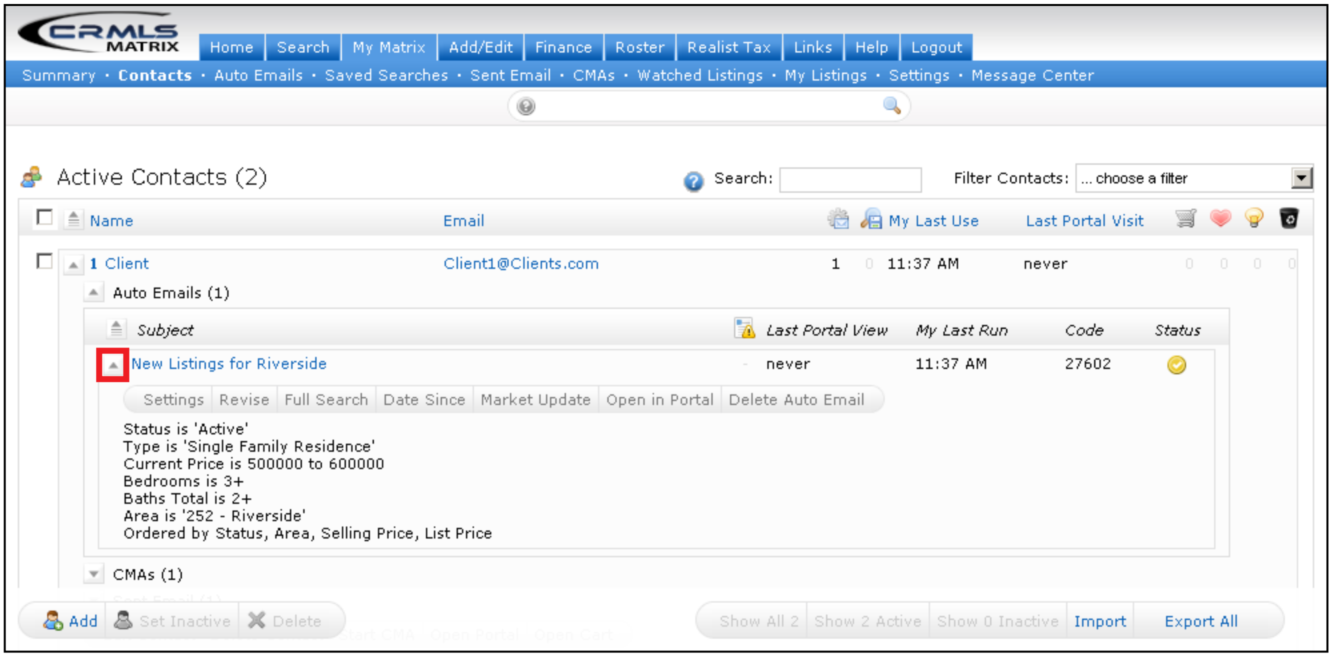
2. Click the triangle next to a contact to expand the contact.
3. Click the triangle next to **Auto Email** to modify and manage auto email settings.



Note:
The Code column shows the auto email's unique ID number used for Reverse Prospecting.

Tip:
Hover your mouse over the icon in the Status column for a pop-up definition of the auto email's status.

4. Click the triangle next to auto email to view auto email details and options.



Now you can do the following:

- Click the **Settings** button, then refer to “Creating Auto Emails from Search Results” on page 21 for information on selecting auto email setting.
- Click the **Revise** button to update the search criteria for your Auto email. Be sure to click the Save button when you’re done updating your search criteria.
- Click the **Full Search** button to view all listings that match your search criteria.
- Click the **Date Since** button to view new listings since the search was generated.
- Click the **Market Update** button view new listings since the time the search was ran. You can also specify a date range or specific date to generate your search results.
- Click the **Open Portal** to view your clients favorite listings, possibilities and discarded listings. See “Viewing Your Client’s Auto Email Portal” on page 42.
- Click the **Delete Auto Email** button permanently remove the Auto Email from your contact.

Auto Email Concierge

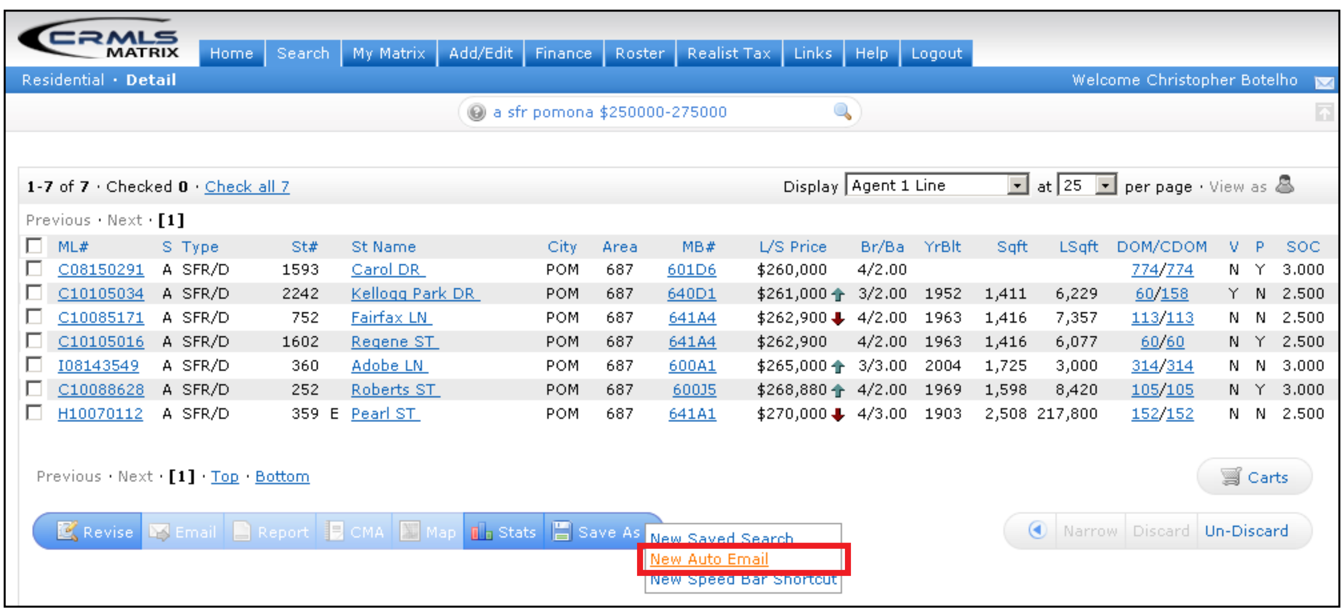
The Auto Email Concierge gives you complete control over listings sent to your clients when using the Auto Email feature. When matching listings are found by your client's Auto Email, they will appear in the Concierge. The Concierge will allow you to approve and reject listings and only listings that you approve will be emailed and made available in your client's portal. The Concierge is especially helpful when you require close management of listings sent to your clients. Follow the steps in these sections to create a new Concierge Auto Email, approve or reject listings, and manage Auto Emails with Concierge enabled:

- "Creating a Concierge Auto Email" below
- "Filtering Listings in the Concierge" on page 32
- "Enabling Concierge Mode for Existing Auto Emails" on page 34
- "Disabling Concierge Mode for an Auto Email" on page 36
- "Auto Email Icons and Displays for Concierge Mode" on page 38

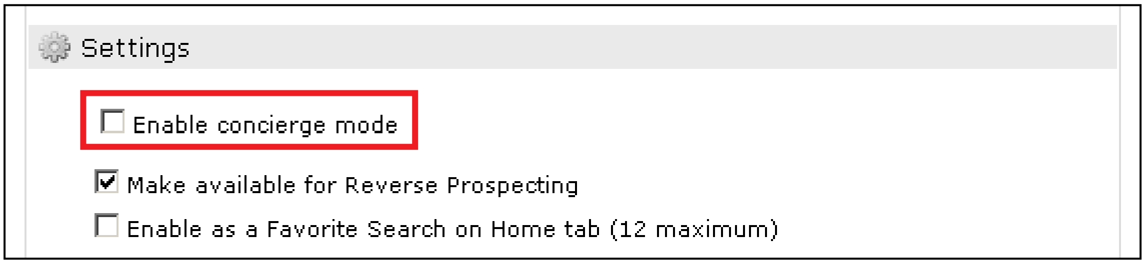
Creating a Concierge Auto Email

Follow the steps below to create a Concierge Auto Email. Before you begin, make sure that you've performed a search and are at the Search Results page.

1. From the Search Results page, click the **Save As** button and select **New Auto Email**.

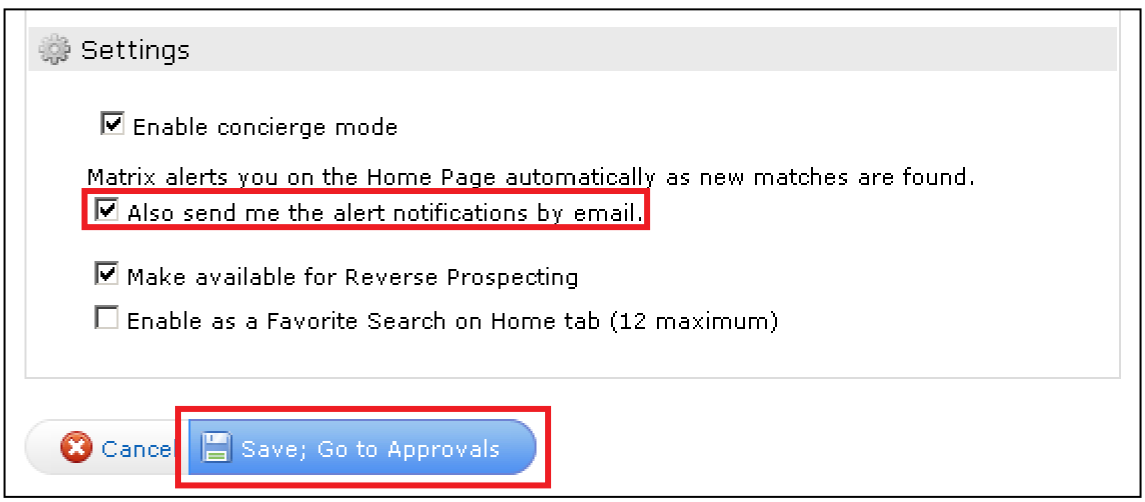


2. On the Save a New Auto Email page, select a contact from the **Contact** drop-down list to assign the auto email to an existing contact. To add a new contact, click the **Create a New Contact** link.
3. Enter a subject for the email in the **Subject** field.
4. Click the **Enable concierge mode** checkbox under the Settings section.



Once you click the Enable concierge mode checkbox, the scheduling options for your Auto email will be removed.

5. To receive an email alert when new listings are available for review, click the **Also send me the alert notifications by email** checkbox.
6. Click the **Save; Go to Approvals** button to save your Auto Email.

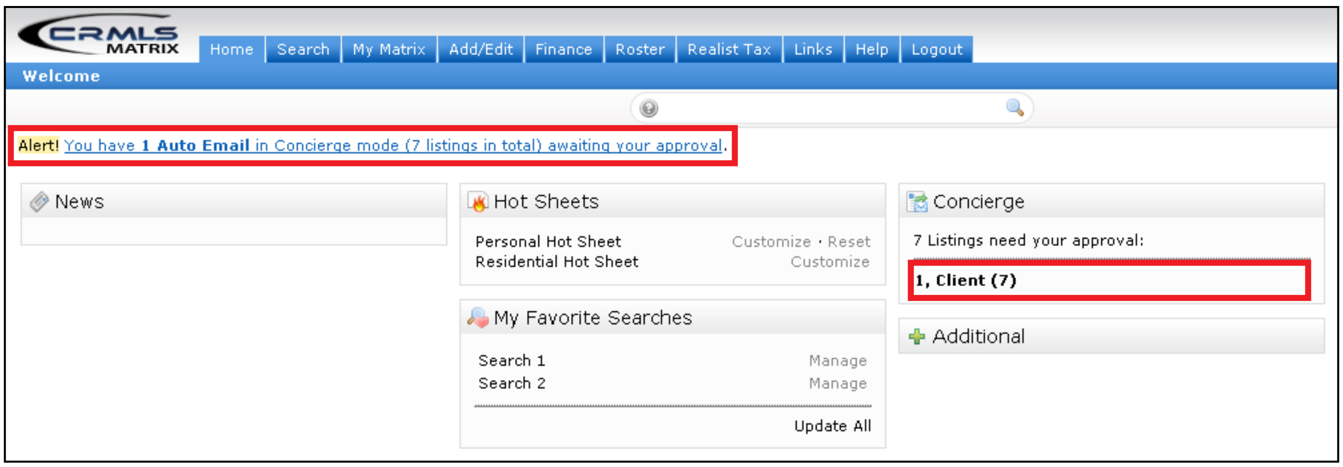


You see the Concierge Approvals Page. Continue with “Filtering Listings in the Concierge” on page 32.

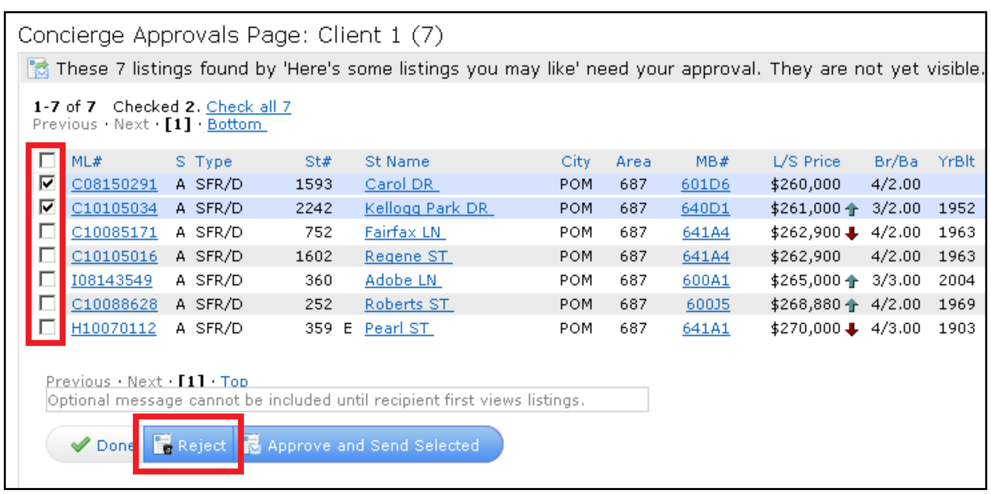
Filtering Listings in the Concierge

When you create an Auto Email with the Concierge enabled, you will be taken to the Concierge Approvals page to approve and reject listings for the initial Auto Email. When your Auto Email finds additional listings that match your criteria you will see a notification in the Concierge Widget on the Home tab and at the top of most pages in the CRMLS Matrix Platform. Depending on the notification settings you selected you may also receive an email letting you know that you have listings waiting for your approval. Follow the steps below to approve or reject listings for your Auto Email.

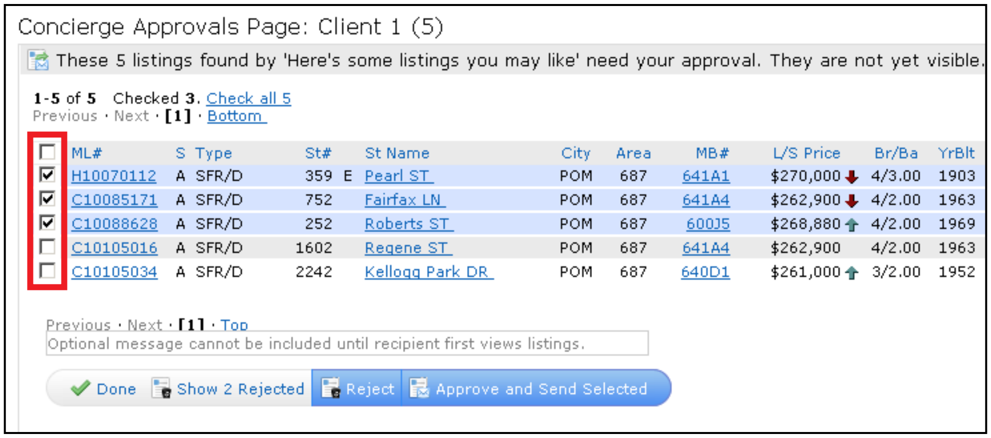
1. Click the notification link at the top of the CRMLS Matrix Platform or the link in the Concierge Widget on the Home tab to go to the Concierge Approvals Page.



2. Click the checkbox next to each listing you want to reject, then click the **Reject** button.

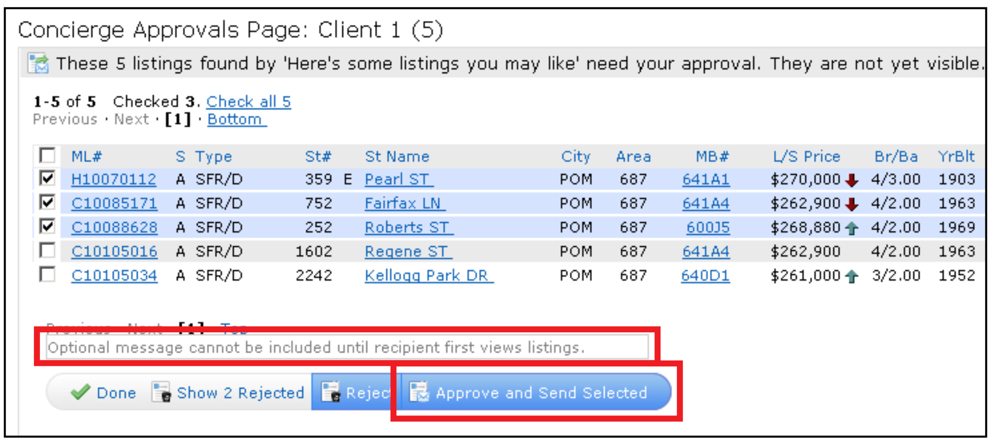


3. Click the checkbox next to each listing you want to approve and send to your client.



4. Once your client views the initial Auto Email, you can enter a message in the available field to provide your client with additional information about the listings you're sending to them.

5. Click the **Approve and Send Selected** button.



Note:
*Once you approve or reject a listing it will always be approved or rejected and will not be reconsidered for this Auto Email. To approve previously rejected listings, click the **Show Rejected** button, click the checkbox next to each listing you want to approve, then click the **Approve and Send** button.*

If you're unsure of a few listings, they can be left in the Concierge Approvals Page for approval or rejection at a later date. Leaving listings in the Concierge will result in the alert message remaining at the top of the CRMLS Matrix Platform and in the Concierge Widget on the Home tab.

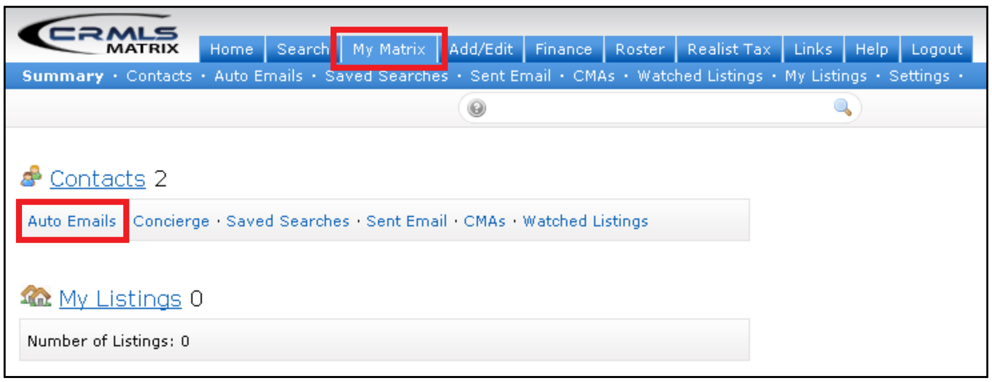
6. When you're done approving and rejecting listings, click the **Done** button.

Enabling Concierge Mode for Existing Auto Emails

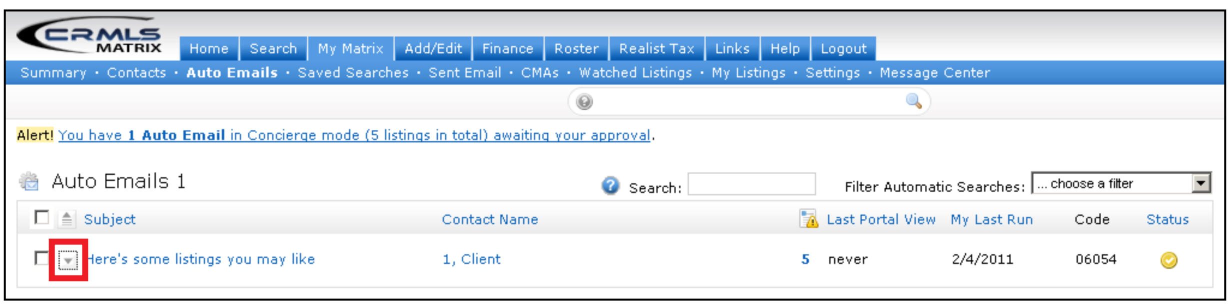
Follow the steps below to enable Concierge for an existing auto email.

Note:
Any listings waiting in the Concierge and listings that you've previously rejected will automatically be sent to your client when the Concierge is disabled.

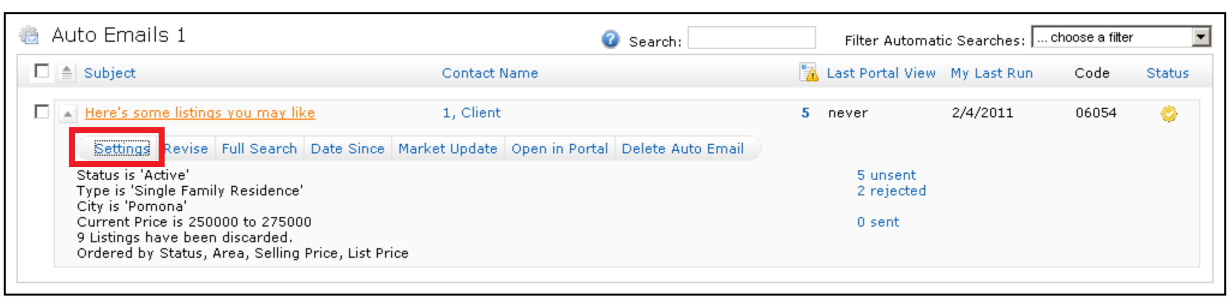
1. Click the **My Matrix** tab.
2. Click **Auto Emails**.



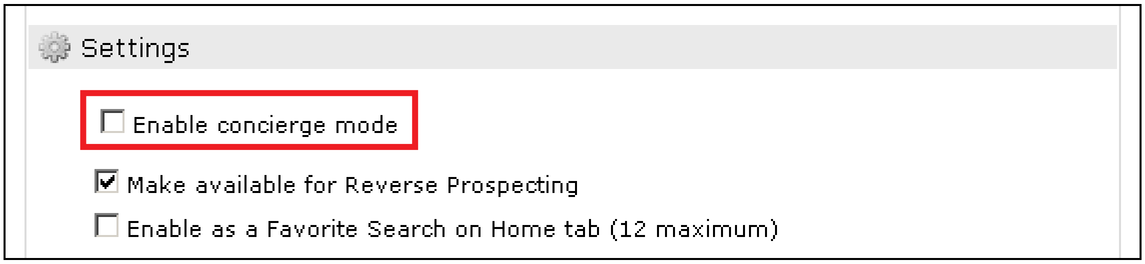
3. Click the arrow next to the Auto Email you want modify.



4. Click the **Settings** button.

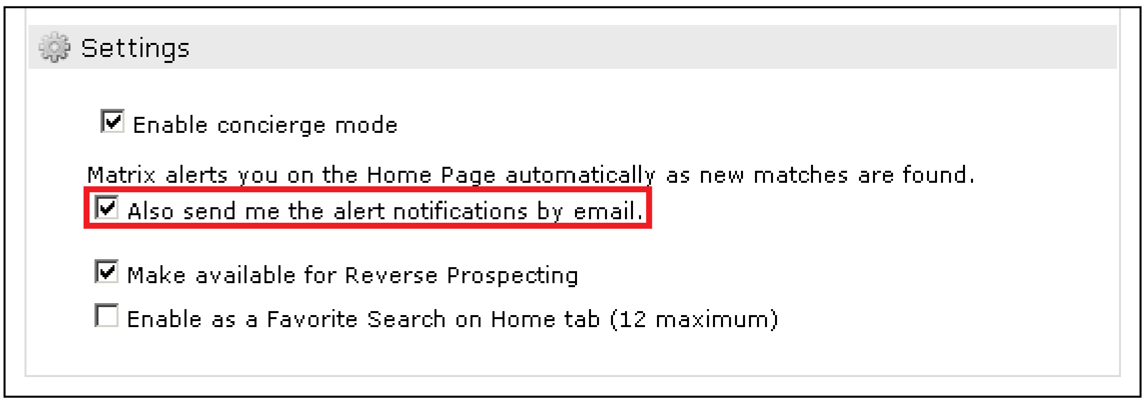


5. Click the **Enable concierge mode** checkbox under the Settings section.

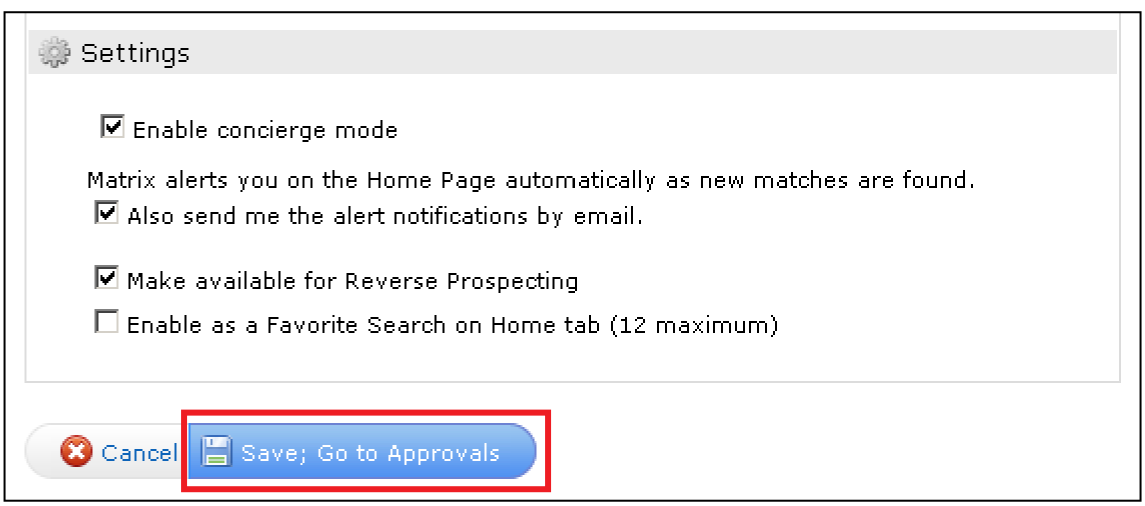


Once you click the Enable concierge mode checkbox, the scheduling options for your Auto email will be removed.

6. To receive an email alert when new listings are available for review, click the **Also send me the alert notifications by email** checkbox.



7. Click the **Save; Go to Approvals** button to save your Auto Email.



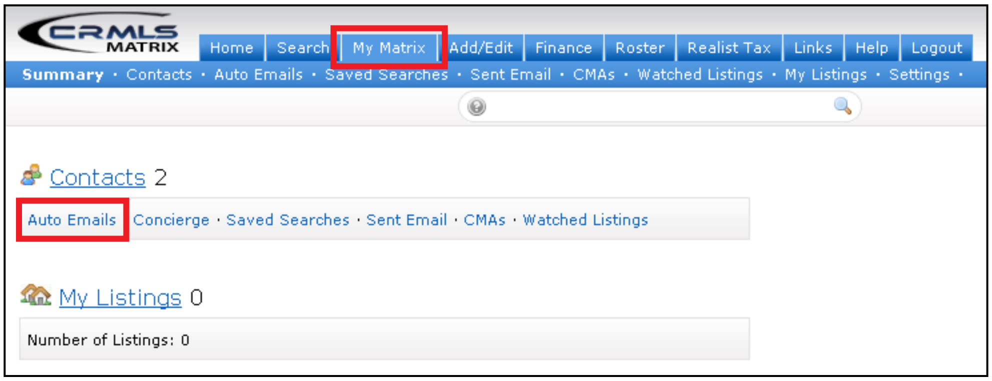
You see the Concierge Approvals Page. Continue with “Filtering Listings in the Concierge” on page 32.

Disabling Concierge Mode for an Auto Email

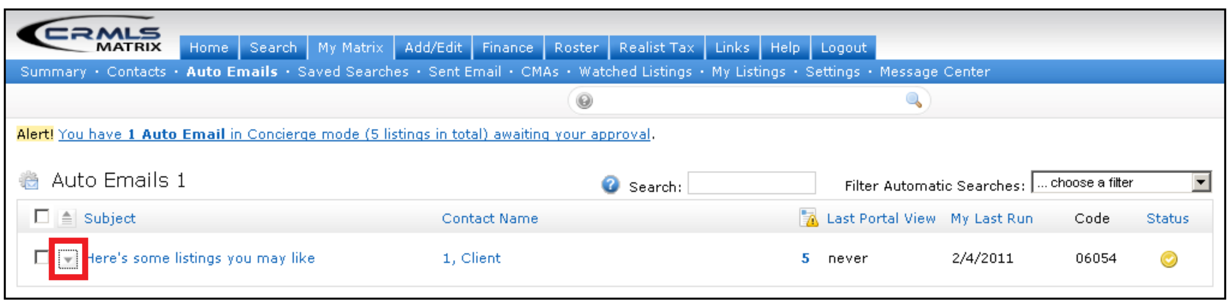
Follow the steps below to disable the Concierge for an Auto Email.

Note:
Any listings waiting in the Concierge and listings that you've previously rejected will automatically be sent to your client when the Concierge is disabled.

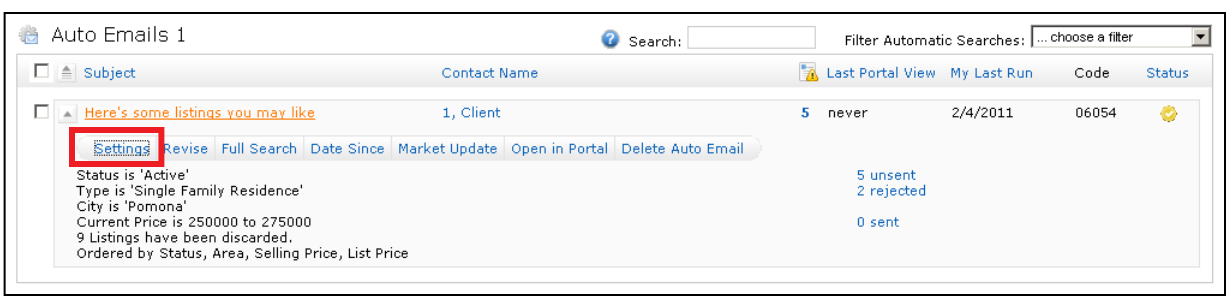
1. Click the **My Matrix** tab.
2. Click **Auto Emails**.



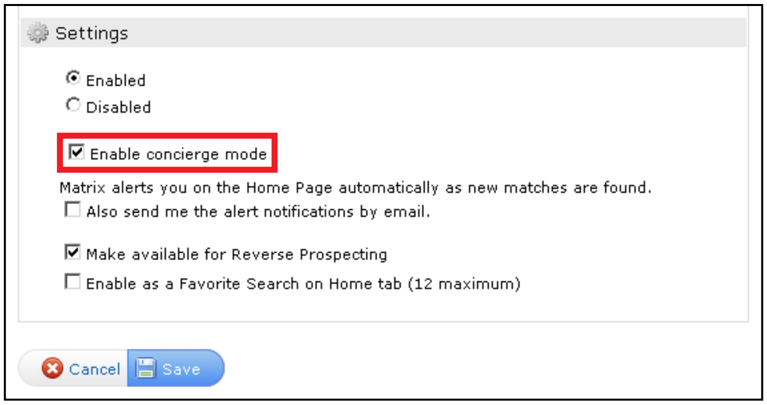
3. Click the arrow next to the Auto Email you want modify.



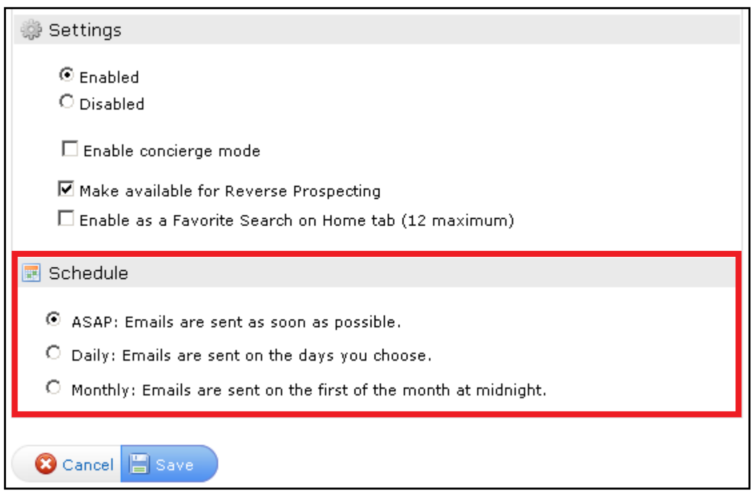
4. Click the **Settings** button.



5. Uncheck the **Enable concierge mode** checkbox.



6. When you see the confirmation message, click **OK** to disable Concierge Mode.
7. Select Schedule options for your Auto Email as necessary.

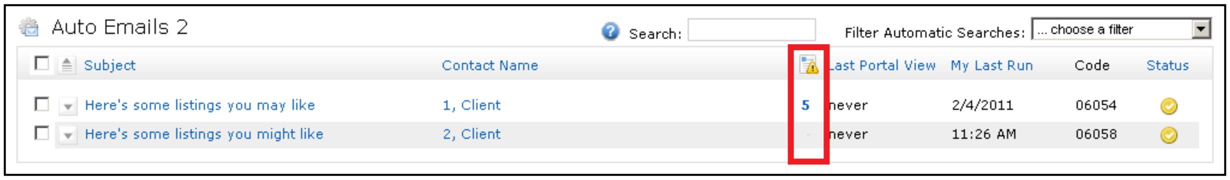


8. Click the **Save** button to save the changes for your Auto Email.

Auto Email Icons and Displays for Concierge Mode

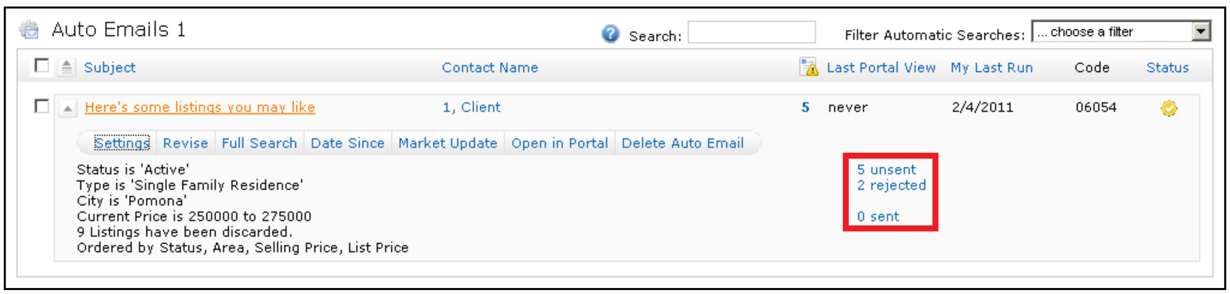
The Auto Email display on the My Matrix tab has been updated with new icons and displays for Concierge.

A new **Unsent Results** column has been added to provide you with quick access the Concierge Approval Page. Click on a number the column to immediately jump to the corresponding Concierge Approvals Page.



Note:
The Unsent Results column will display a dash for all Auto Emails with Concierge Mode disabled.

A summary of the listings that are waiting to be filtered, the number of listings you've rejected, and the number of listings you've sent has been added to Auto Email details. Click the links to go to the Concierge Approvals, Previously Rejected, and Sent listing pages.



Viewing Sent Email History

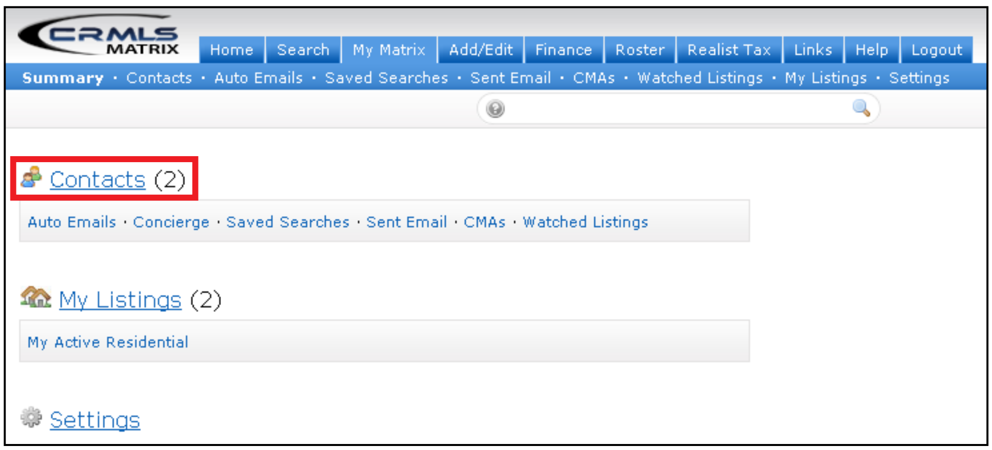
Follow the steps in these sections to view emails that were sent to your client and to view your client's activity in the Client Portal.

- "Viewing Email History" below
- "Viewing Your Client's Auto Email Portal" on page 42

Viewing Email History

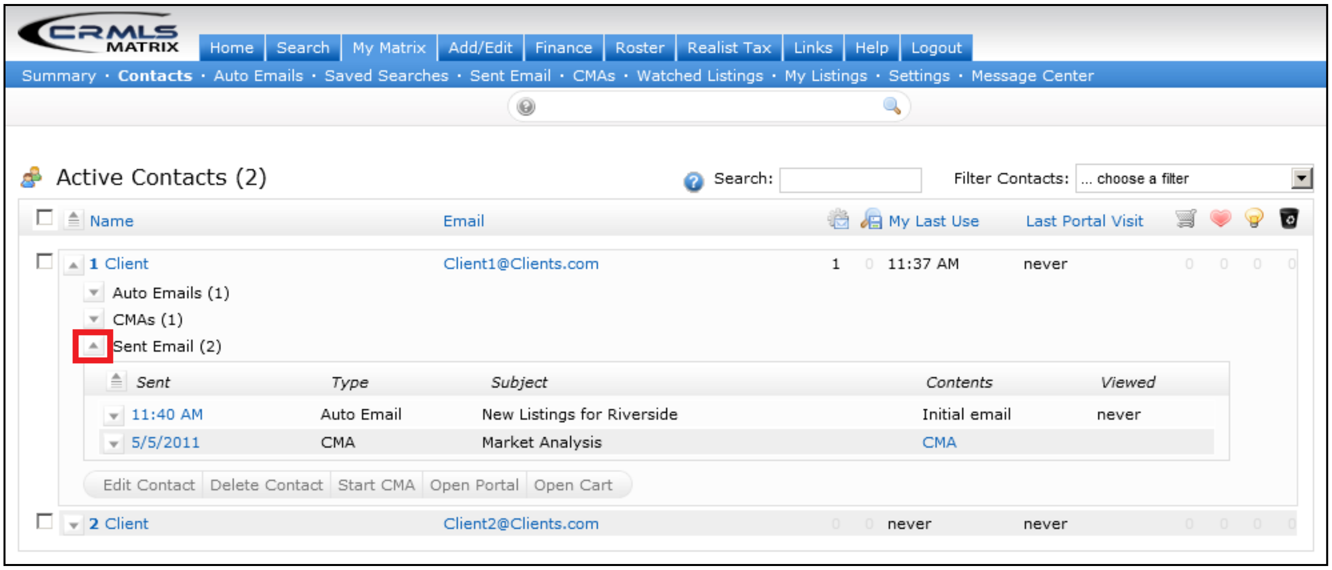
Follow the steps below to view sent email history.

1. From the My Matrix tab click the **Contacts** link.



2. Click the triangle next to a contact to expand the contact.

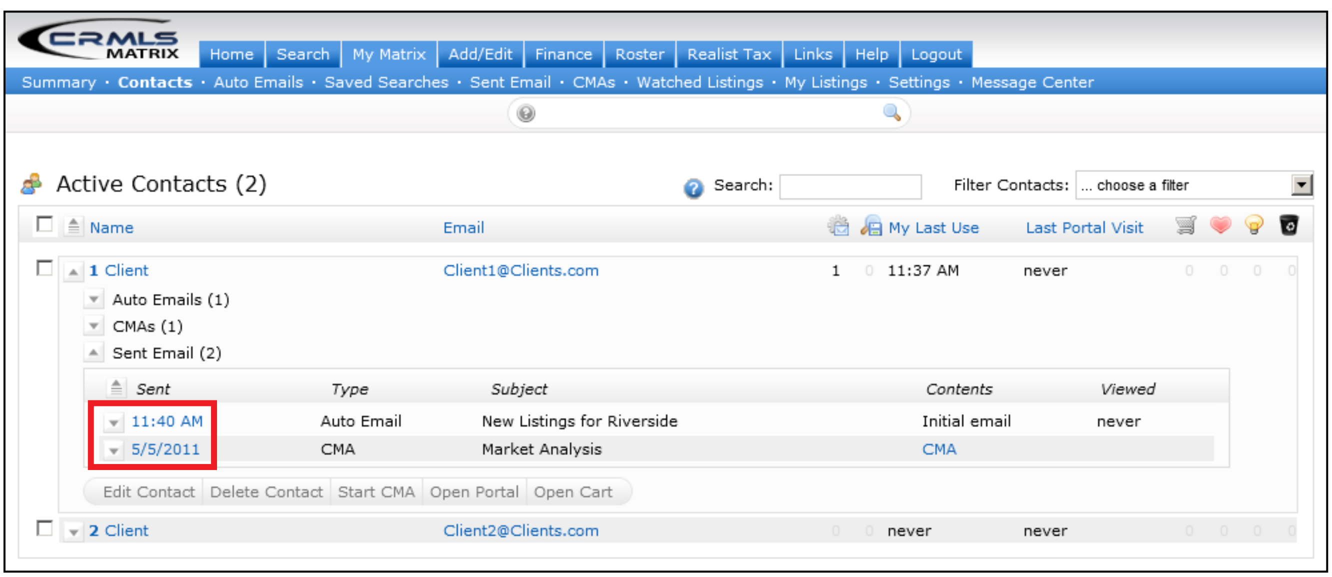
3. Click the triangle next to Sent Email to expand the email list.



Note:

- *The Contents column gives you a total count of the number of listings sent.*
- *The Viewed column lets you know when the client viewed the email sent by CRMLS Matrix.*
- *If you sent an Auto Email to your client a status of Waiting Activation maybe listed. This means that your client has not opened your Auto Email. After your client clicks on the view listings link in their Email, the system will continue sending listings.*

4. Click a date to view the email history information.



For a complete list of the types of emails and their definitions, refer to the table below:

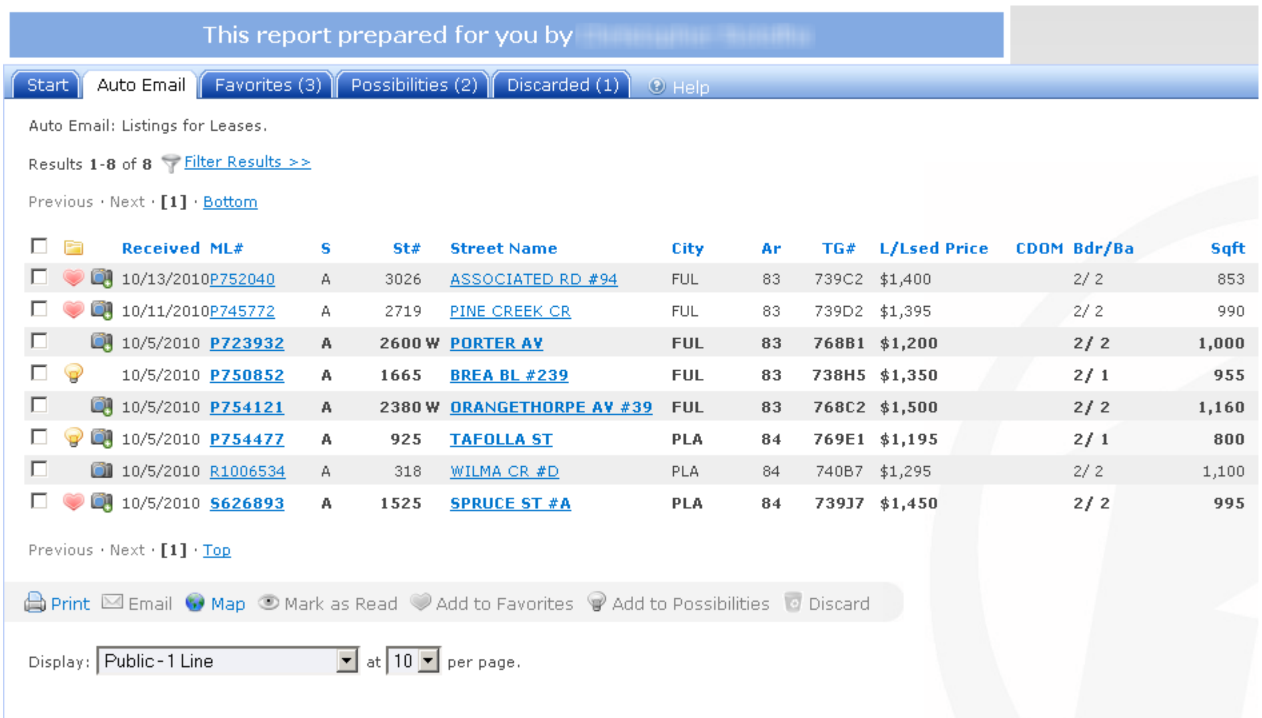
Email Type	**Description**
Auto Emails	Emails sent using the Auto Email feature.
CMAs	Emails sent from the CMA Wizard.
Direct	Emails sent directly sent from a search results page.
Directions	Emails sent from a Driving Directions page.
Publish	Emails sent using the Auto Email feature with Concierge mode enabled.
Reports	Email reports sent directly from a search results page.
Stats	Emails sent from a Statstic Chart page.

Viewing Your Client’s Auto Email Portal

Your customers have the ability to interact with their emails and auto emails using their own Client Portal. This feature allows your clients to select listings as their Favorites, Possibilities, and Discard unwanted properties.

Create an Email or Auto Mail for your client and an email will be sent to your client. Your client will receive an email with a link to their client portal.

From the client portal, your client can view listings on a Map, mark listings as Favorites, Possibilities, or Discard properties.



This report prepared for you by

Start | Auto Email | Favorites (3) | Possibilities (2) | Discarded (1) | Help

Auto Email: Listings for Leases.

Results 1-8 of 8 Filter Results >>

Previous · Next · [1] · Bottom

Received	ML#	S	St#	Street Name	City	Ar	TG#	L/Lsed Price	CDOM	Bdr/Ba	Sqft
10/13/2010	P752040	A	3026	ASSOCIATED RD #94	FUL	83	739C2	$1,400		2/ 2	853
10/11/2010	P745772	A	2719	PINE CREEK CR	FUL	83	739D2	$1,395		2/ 2	990
10/5/2010	P723932	A	2600 W	PORTER AV	FUL	83	768B1	$1,200		2/ 2	1,000
10/5/2010	P750852	A	1665	BREA BL #239	FUL	83	738H5	$1,350		2/ 1	955
10/5/2010	P754121	A	2380 W	ORANGETHORPE AV #39	FUL	83	768C2	$1,500		2/ 2	1,160
10/5/2010	P754477	A	925	TAFOLLA ST	PLA	84	769E1	$1,195		2/ 1	800
10/5/2010	R1006534	A	318	WILMA CR #D	PLA	84	740B7	$1,295		2/ 2	1,100
10/5/2010	S626893	A	1525	SPRUCE ST #A	PLA	84	739J7	$1,450		2/ 2	995

Previous · Next · [1] · Top

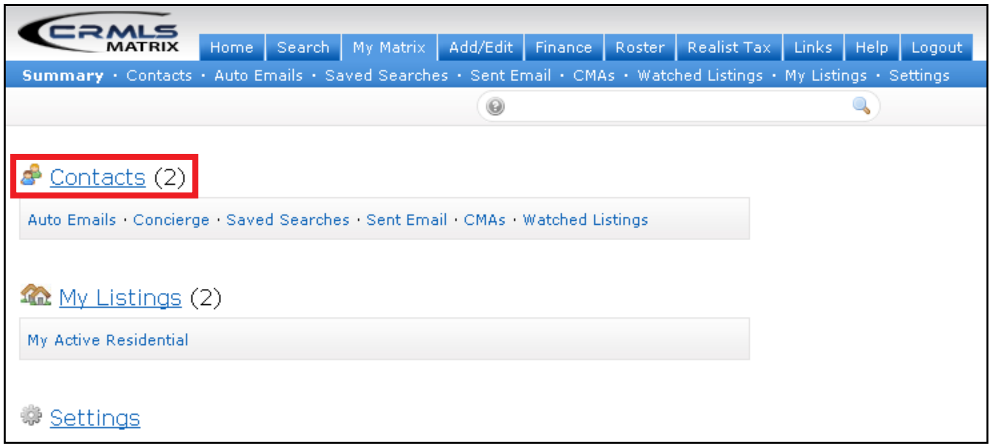
Print | Email | Map | Mark as Read | Add to Favorites | Add to Possibilities | Discard

Display: Public - 1 Line at 10 per page.

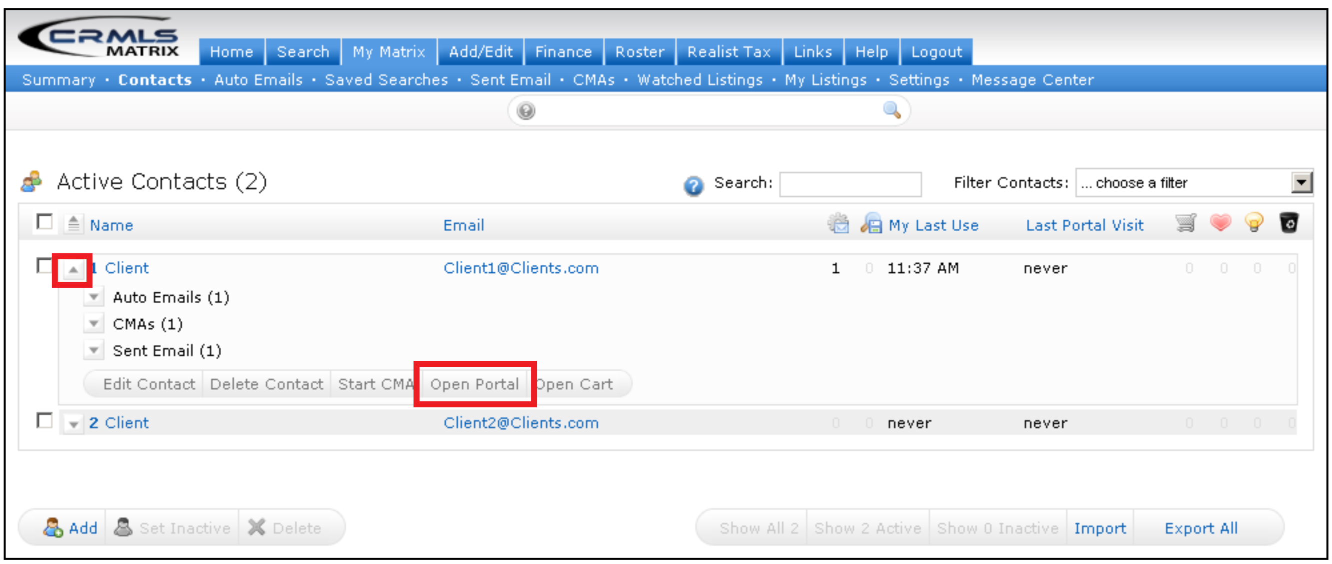
Note:
Listings that have been set into Favorites, Possibilities and Discarded will be saved and can be retrieved each time your client opens their Portal.

Follow the steps below to view your client’s Favorite, Possible, and Discarded properties.

1. From the My Matrix tab click the **Contacts** link.



2. Click the triangle next to a contact to expand the contact.
3. Click the **Open Portal** button to view your client's Favorites, Possibilities, and Discarded listings.



Note:
From the client portal, you can add listings to the Favorites, Possibilities, and Discarded listings folders for your client.

Anti Spam Feature

All emails sent through the CRMLS Matrix Platform have an unsubscribe link allowing recipients the ability to unsubscribe from receiving additional emails from the CRMLS Matrix Platform. There are different unsubscribe options available that your client can chose from when they receive Direct or Auto Email. The benefit of this feature is that you will be notified if the member has marked your email as spam.

Unsubscribe from Direct Emails

Direct emails are Listing or CMAs that have been sent to your client by clicking on the email button within the CRMLS Matrix Platform. If your client chooses to opt out of these emails they can use the Unsubscribe link.

Welcome to "The Portal"

All messages I send to you containing MLS® listing information - those I send you manually as well as those I set our system to send you automatically - 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 MLS® listing information I've prepared for you in several different formats. For your convenience, you'll be able to sort these listings and categorize them. You'll be able to see all associated photographs. And you'll be able to see them on a pinned on a map, a high-level aerial photograph or a low-level "Bird's Eye" photograph.

I hope you enjoy working with The Portal and would be happy to hear your feedback. In the meantime, please click on the link below to begin your Portal experience.

Click the following link to view ALL property listings
http://www.mrmlsmatrix.com/DAE.asp?ID=61392049-680133871-50

Christopher Botelho

Note: The Web link above will expire 30 days after the date of this email.

Click this link if you wish to Unsubscribe:
http://www.mrmlsmatrix.com/UAE.asp?ID=0-680133871-00&Eml=Y2Fzc2FuZHJhYm90ZWxob0BnbWFpbC5jb20%3d

When your client clicks the Unsubscribe link, they see a window like this one:

From the Unsubscribe window, your client can select the following options:

- Unsubscribe from a single direct or auto email
- Unsubscribe from all emails from the real estate agent that sent the email
- Unsubscribe from all emails from ALL CRMLS real estate agents

Agent Notification

If your client unsubscribed from an email, marked it as spam, or disabled an email, you will receive an email notifying you that your client has unsubscribed. You can assist your client if they unsubscribed by mistake.

How to Re-subscribe to Direct or Auto Email:

1. If your client has unsubscribe by clicking the unsubscribe link in their email. They can re-subscribe by sending an email to OptIn@MRMLSmatrix.com from the email address they unsubscribed from.

   Re-subscribing will remove all blocks assigned to that recipient and allow the recipient to receive email through Matrix again. This email can be left blank, no subject or body text required.

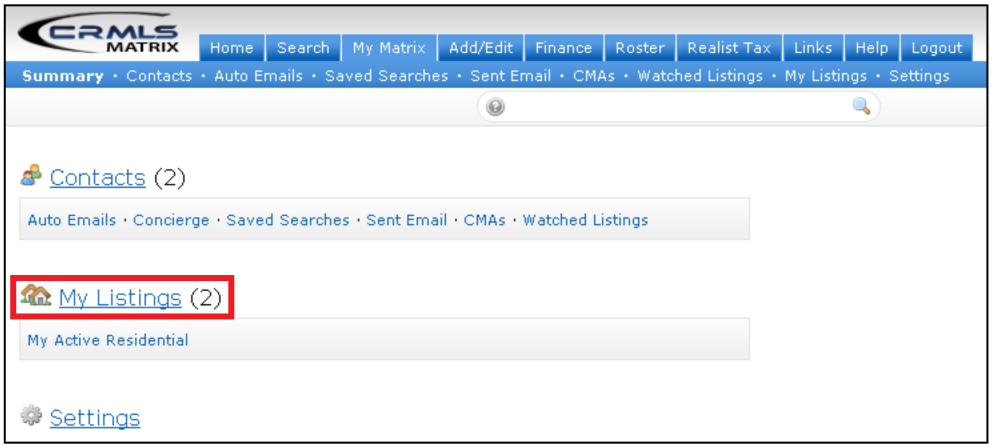
2. If your client accidently has marked an email as spam through their email provider (such as AOL, MSN, Hotmail) re-subscribing might not be enough. The clients need to notify their email provider that they want to receive future emails from CRMLS Matrix. The following links under ISP Specific Help will direct clients what steps to take.

   Yahoo New: http://help.yahoo.com/l/us/yahoo/mail/yahoomail/abuse/

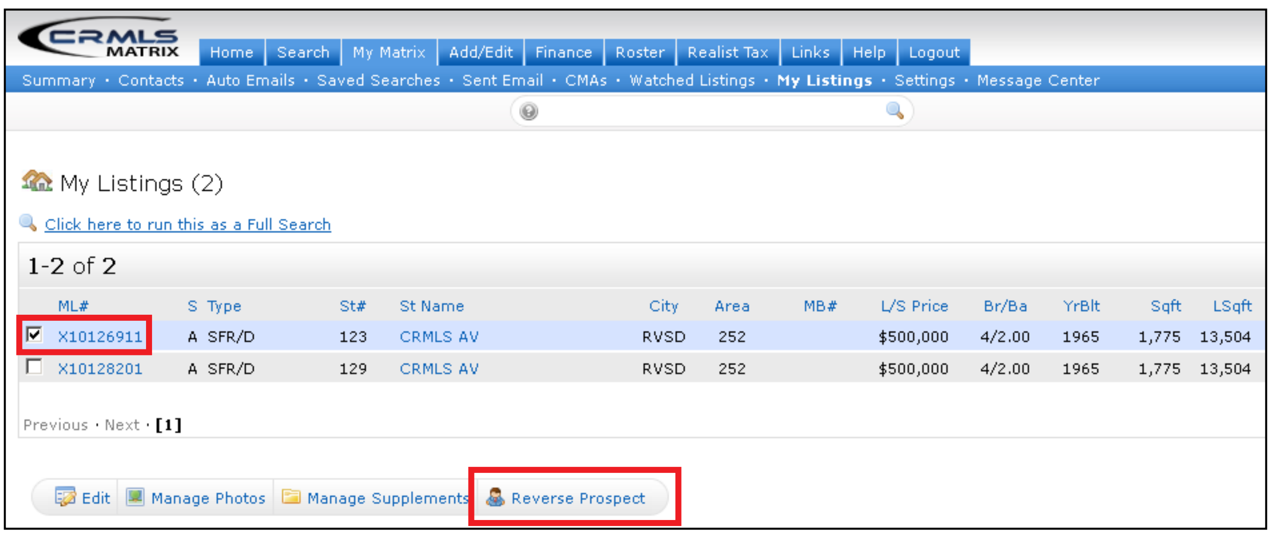
Reverse Prospecting

Reverse Prospecting allows you to see how many agents have sent your listing as part of an Auto Email. Follow the steps below to get started.

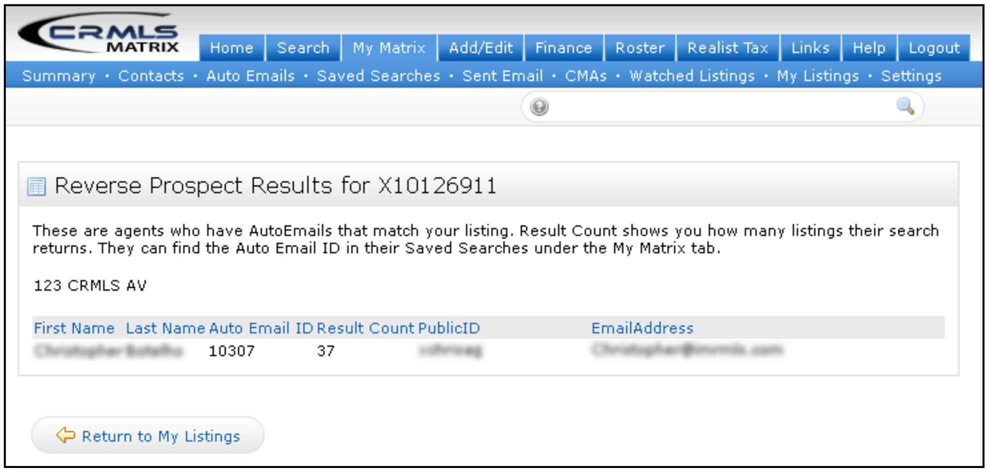
1. From the My Matrix tab click the **My Listings** link.



2. Click the checkbox next to a listing that you would like to Reverse Prospect.
3. Click the **Reverse Prospect** button.



4. The reverse prospects will show the first and last names of the agents who auto emailed your listing. It will also show the Auto Email ID, Results Count, Public ID and Email address of the agent that had an auto email that send your listing to a client.



Note:
The Results Count is the number of listings that were auto emailed by the agent. Your listing is one of the listings in the results count (lower result counts are better, meaning your listing is one of a fewer number of listings that match the search criteria for a client).

Carts

The CRMLS Matrix Platform allows you to keep particular listings in a Carts for quick access. Listings that you add to a Cart will remain in the cart regardless of changes/modifications the listings go through.The CRMLS Matrix Platform also allows you and your clients to have individual Cross-Property Carts to store listings in while viewing search results. You can then view your client's Carts and quickly print listing reports or email the listings to your clients. Refer to these sections to manage client Carts:

- "Adding Listings to a Cart" below
- "Accessing Carts" on page 50
- "Removing Listings from Carts" on page 53

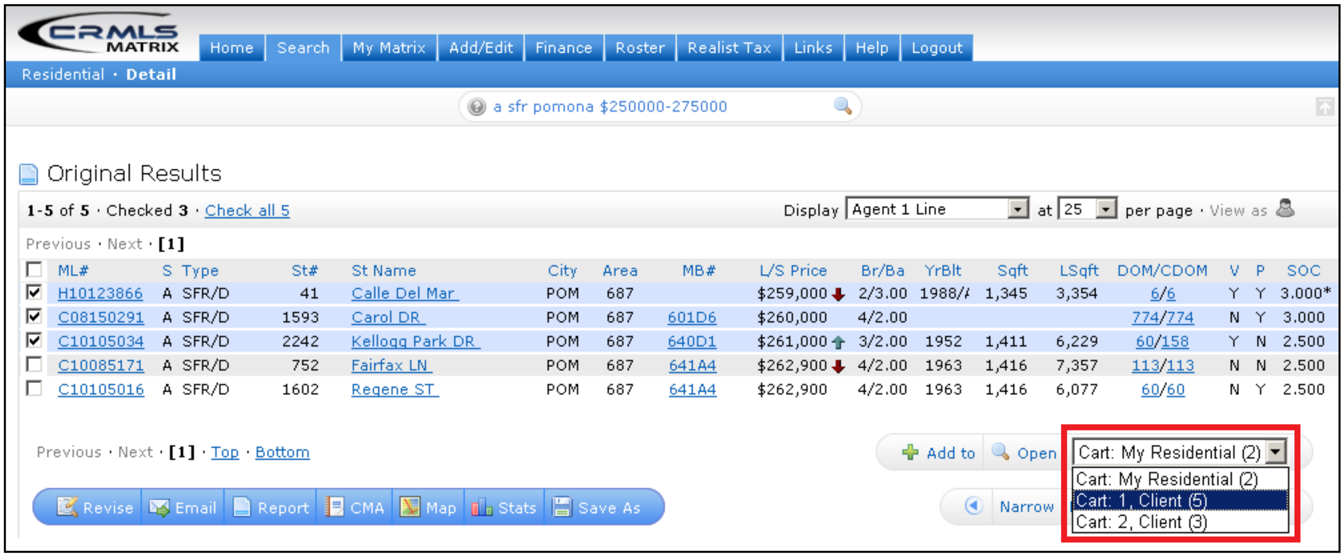
Adding Listings to a Cart

Follow the steps below to add listings to a Cart. Before you begin, make sure that you've performed a search and are at the search results page.

1. Click the checkbox next to each listing you want to add to a Cart.
2. Click the **Carts** button to expand the Carts button bar.

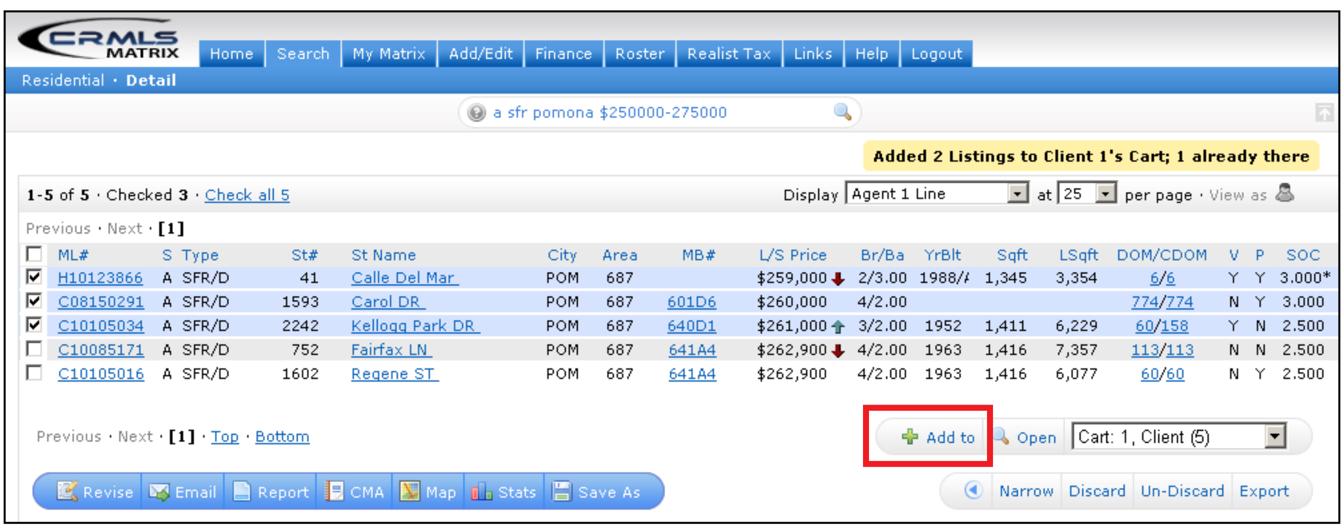
> ***Note:***
> *After you click the Carts button, the Carts button bar stays expanded until you log out of the CRMLS Matrix Platform.*

3. Do one of the following:
   - Select **My Residential** in the drop-down menu to add the listings to your agent cart.
   - Select a client's cart in the drop-down menu to add the listings to your client's cart.



Note:
*If you have a large number of clients, you may need to select **-- more (click) --** to display additional clients.*

4. Click the **Add to** button to add the selected listings to the selected Cart.



When the listings have been added to the Cart, you see a confirmation message at the top of the screen. If the Cart already contains one of the listings you selected, you'll see a message similar to the one above.

Note:
*To add the same listings to another Cart, select a different Cart in the drop-down menu on the Carts button bar. Then click the **Add to** button to add the listings to the Cart you selected.*

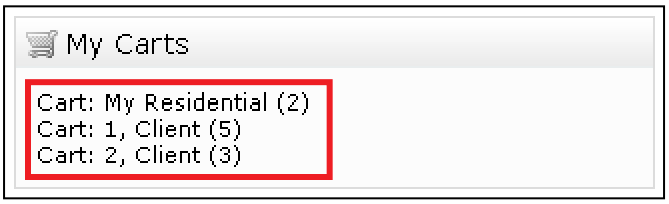
Accessing Carts

The CRMLS Matrix Platform provides you with multiple ways to access your Carts. Refer to these sections to access your Carts:

- “Accessing a Cart from the Home Tab” below
- “Accessing a Cart from the Search tab” below
- “Accessing a Cart from the Search Results Page” on page 51
- “Accessing a Cart from the My Matrix Contacts Page” on page 52

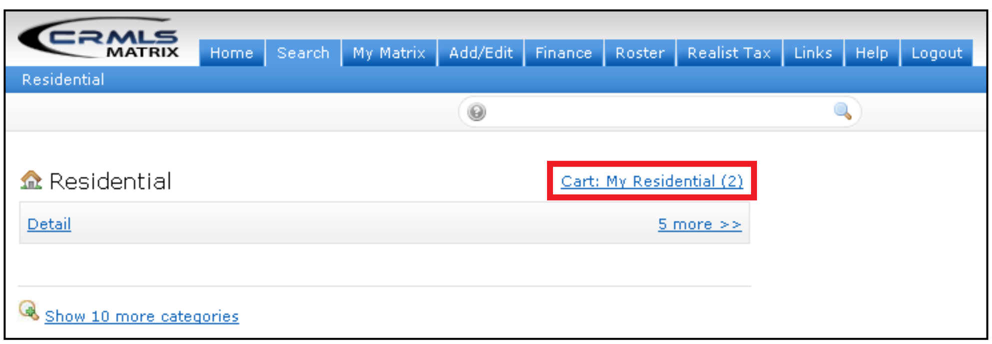
Accessing a Cart from the Home Tab

To access a Cart from the Home tab, click the Cart link in the My Carts widget.



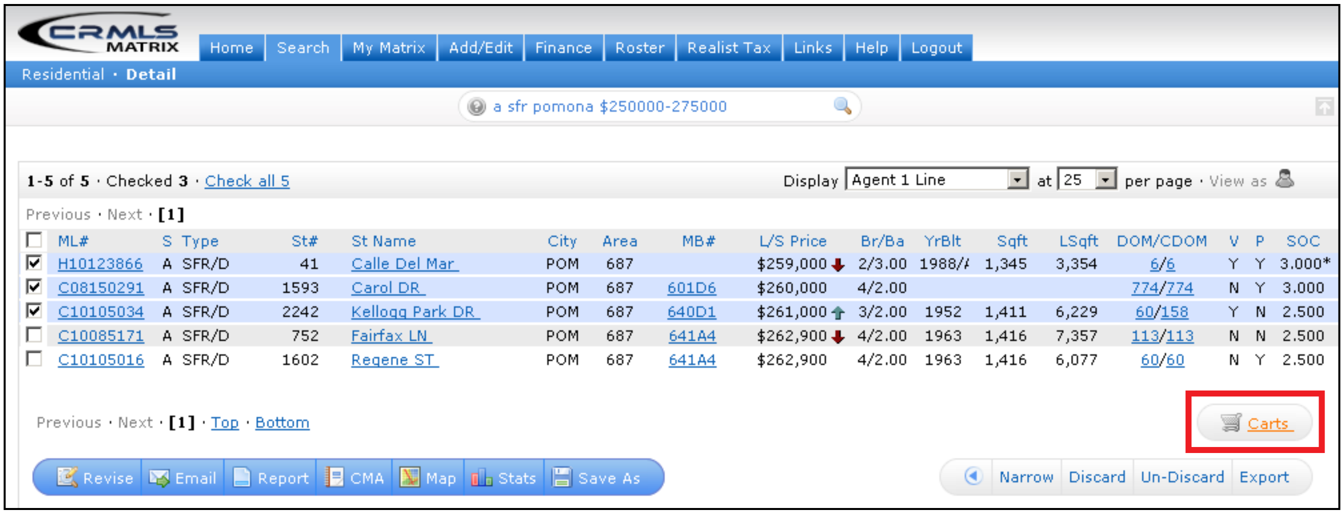
Accessing a Cart from the Search tab

1. Click the **Search** tab.
2. Click the Cart link to open the corresponding Cart for that Property Type.

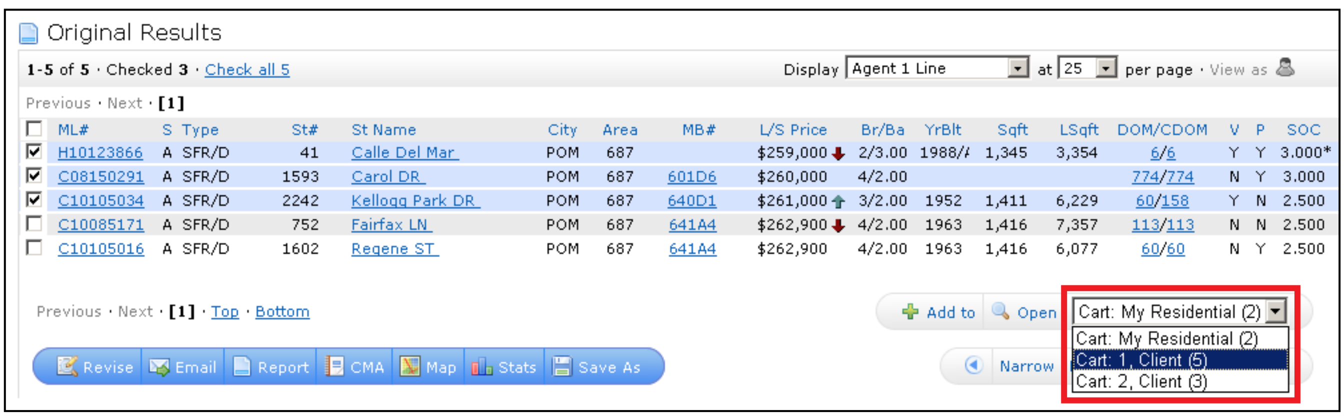


Accessing a Cart from the Search Results Page

1. From the search results page, click the **Carts** button to expand the Carts button bar, if necessary.

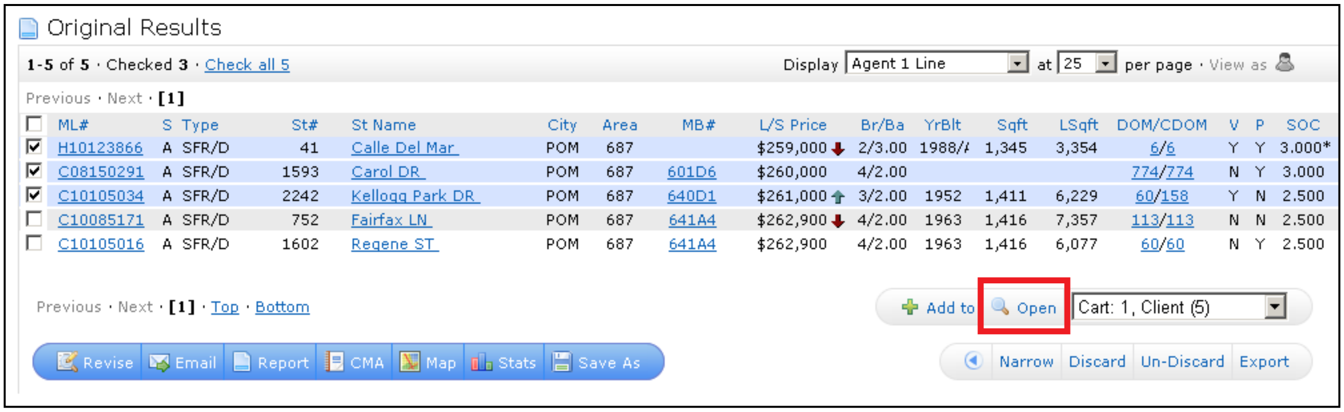


2. Select the Cart you want to view from the drop-down menu.



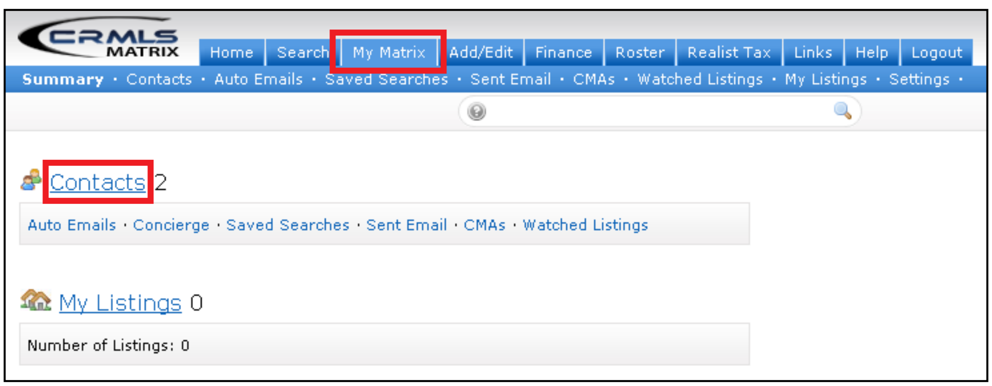
> ***Note:***
> *If you have a large number of clients, you may need to select* ***-- more (click) --*** *to display additional clients.*

3. Click the **Open** button on the Carts button bar.

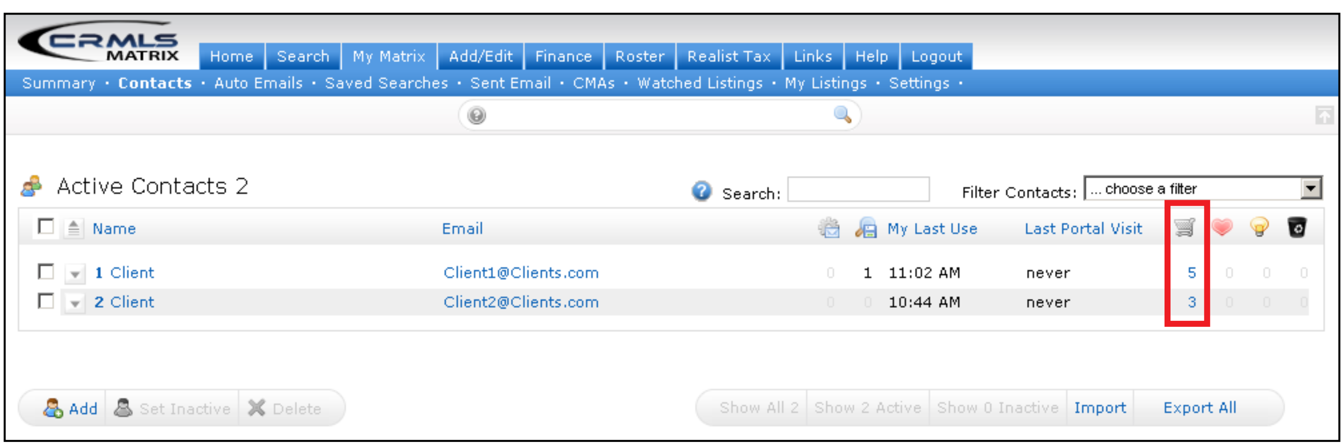


Accessing a Cart from the My Matrix Contacts Page

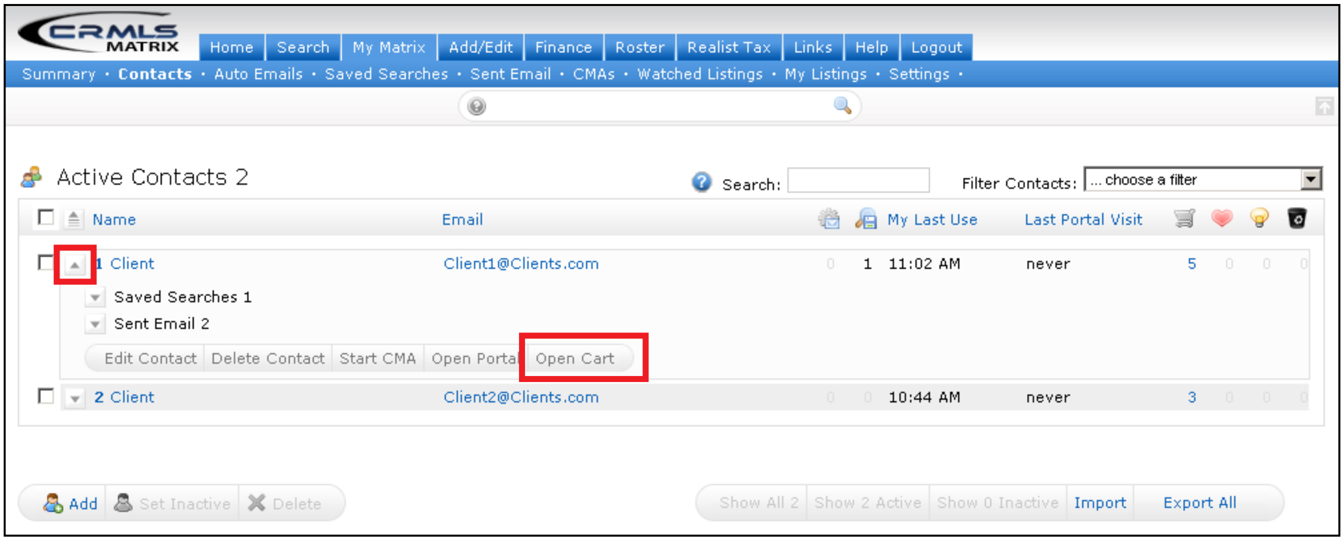
1. Click the **My Matrix** tab, then click the **Contacts** link.



2. Click the number link in the Cart column for the client's Cart you want to view.



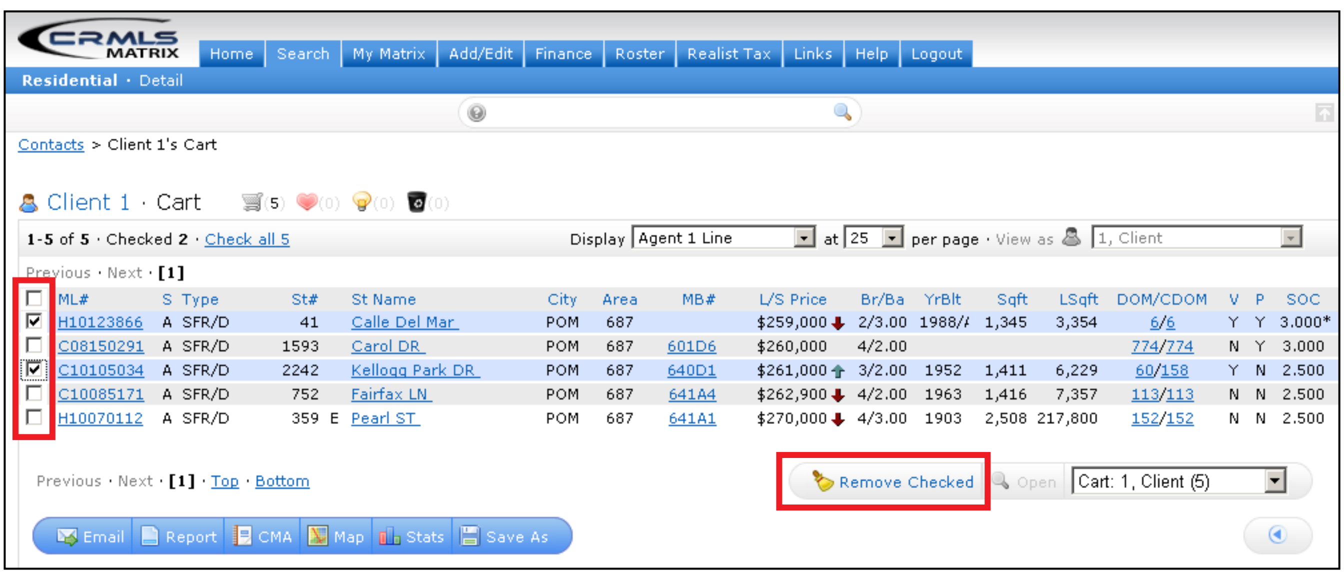
You can also click the arrow to view client details and click the **Open Cart** button.



Removing Listings from Carts

Follow the steps below to remove listings from a Cart.

1. Open the cart you want to remove listings from as described in “Accessing Carts” on page 50.
2. Click the checkbox next to each listing you want to remove from the Cart.
3. Click the **Remove Checked** button to remove the selected listings.

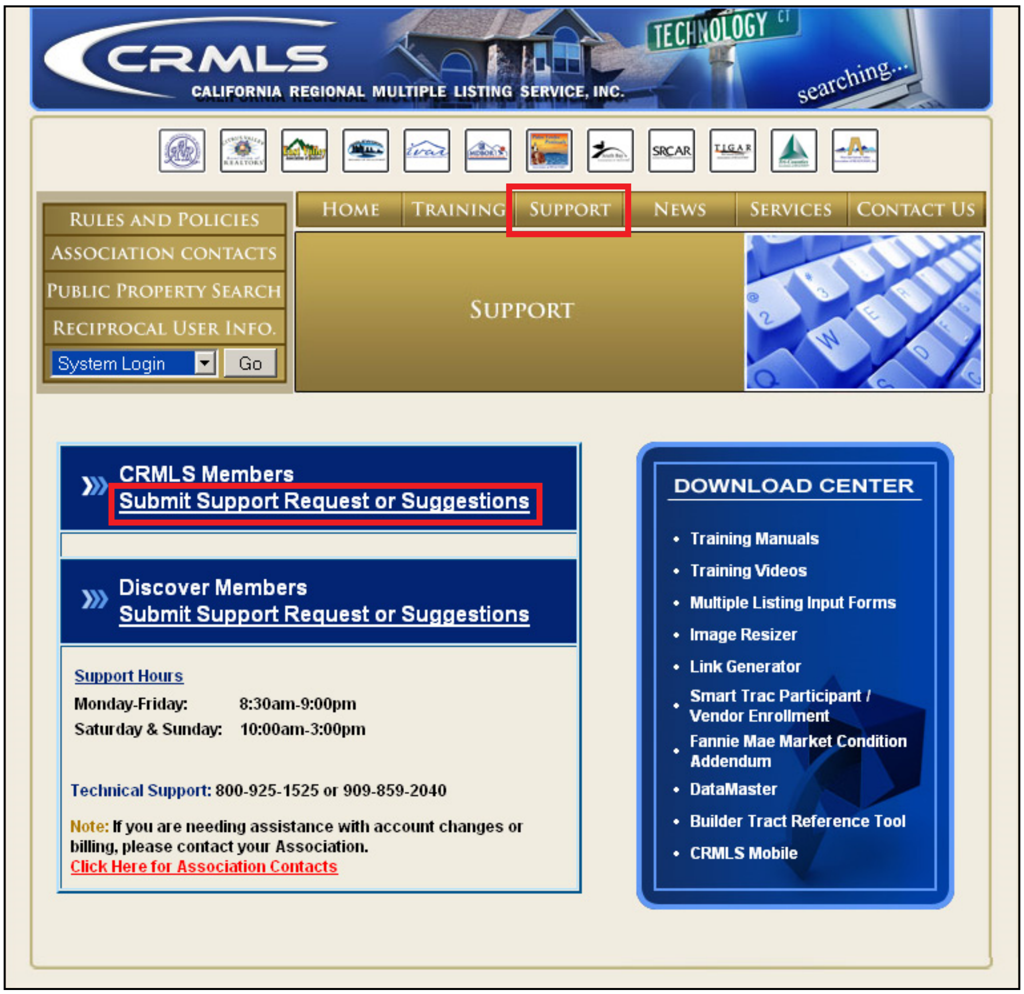


Note:
To quickly remove all listings in a Cart click ***Check All*** *to select all of the listings in the Cart, then click the* ***Remove Checked*** *button.*

Contacting CRMLS Customer Support

CRMLS takes pride in providing expert customer support to all of our members. Our technical support staff is prepared to assist you with any CRMLS Matrix Platform questions you may have, technical issues, or trouble shooting assistance.

To contact our technical support department, visit our website at http://www.crmls.org and click the **SUPPORT** button. Then click the **Submit Support Request or Suggestions** link to submit a support request or a suggestion (we value your suggestions).



If you need immediate assistance, our customer support technicians are available to answer your questions Monday through Friday from 8:30 AM to 9:00 PM and on Saturday and Sunday from 10:00 AM to 3:00 PM.

Toll Free Number: **(800) 925-1525**
On the web: http://www.crmls.org/support