



Matrix Intermediate User Manual



Support: 909-859-2040 / 800-925-1525
Mon.–Fri. 8:30 AM – 9:00 PM · Sat. & Sun. 10:00 AM – 3:00 PM

www.crmls.org

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Intermediate Matrix

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INTRODUCTION

The CRMLS Matrix platform is the industry's top rated MLS platform offering an ultra-modern and flexible environment. This manual will guide you through intermediate search techniques, contact and prospect management, and using carts in Matrix. Follow the steps in these sections to get started.

- [“Minimum System Requirements”](#) on page [3](#)
- [“Disabling Pop-up Blockers”](#) on page [4](#)
- [“Accessing the CRMLS Matrix platform”](#) on page [5](#)

MINIMUM SYSTEM REQUIREMENTS

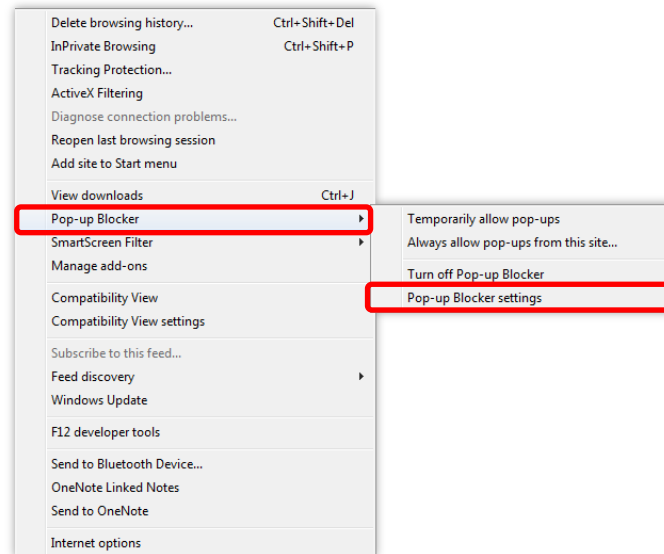
To use the CRMLS Matrix Platform, your system should meet these minimum requirements:

Operating System:	Windows XP, Windows Vista, Windows 7, Windows 8, or Mac OS X
Internet Connection:	56k Modem (high speed internet access recommended)
Web Browser:	Internet Explorer 7.0 or later, Firefox, Safari, or Chrome

DISABLING POP-UP BLOCKERS

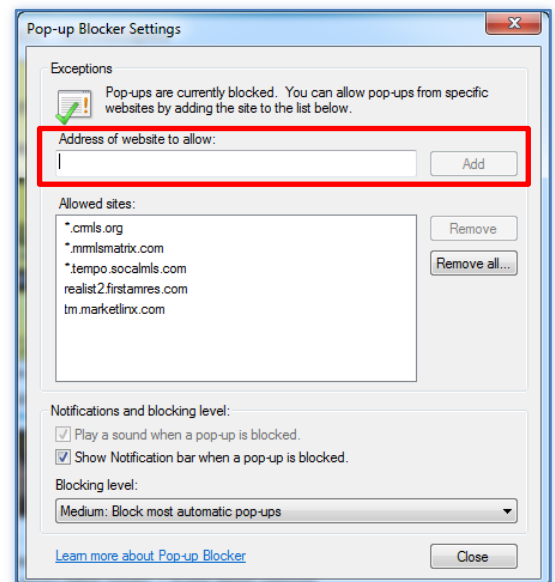
Your computer may have an internet browser or security software that blocks unwanted pop-ups. CRMLS products utilize help screens and other features that may be blocked by some pop-up blockers. Follow the steps below to allow pop-ups from CRMLS products in Internet Explorer.

1. In Internet Explorer, select **Tools** → **Pop-up Blocker** → **Pop-up Blocker Settings**.



2. Add the following websites to the “Allowed Sites” list:

- <http://crmls.org> (CRMLS Website)
- <http://www.mrmmlsmatrix.com> (CRMLS Matrix)
- <http://realist2.firstamres.com> (Realist Tax)
- <http://tm.marketlinx.com> (Smart Trac/Smart Fax)



Note: For information on allowing pop-ups from CRMLS products in other Internet browsers or security software, refer to your application’s documentation.

ACCESSING THE CRMLS MATRIX PLATFORM

Follow the steps below to access the CRMLS Matrix platform.

1. Open your web browser and navigate to <http://www.crmls.org>
2. Click the **CRMLS Matrix** button.



3. Enter your User ID and Password, then click **Login**.



After you have logged in successfully, you will see the CRMLS Matrix home screen.

HOT SHEETS

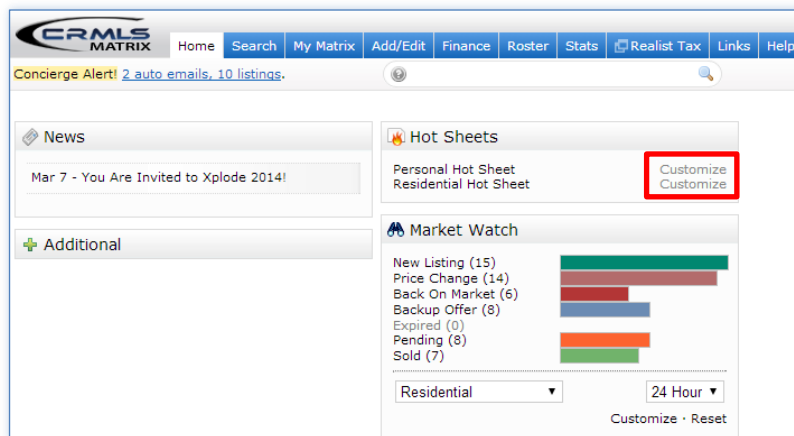
Hot Sheets give you quick access to recent market activity and updates, such as new listings, price changes, back on market, and expired listings. There are two types of Hot Sheets available, Personal and Residential. Personal Hot Sheets give you recent updates for all property types and Residential Hot Sheets give you recent updates for the Residential Property type only.

- [“Customizing Hot Sheets”](#) on page [6](#)
- [“Running Your Hot Sheets”](#) on page [7](#)

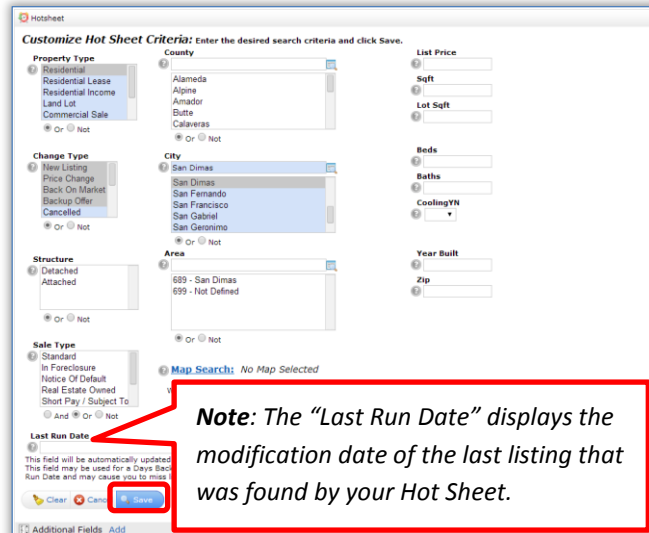
CUSTOMIZING HOT SHEETS

Follow the steps below to customize your Hot Sheets.

1. From the **Home** tab, click the **Customize** link for the Hot Sheet you want to work with.

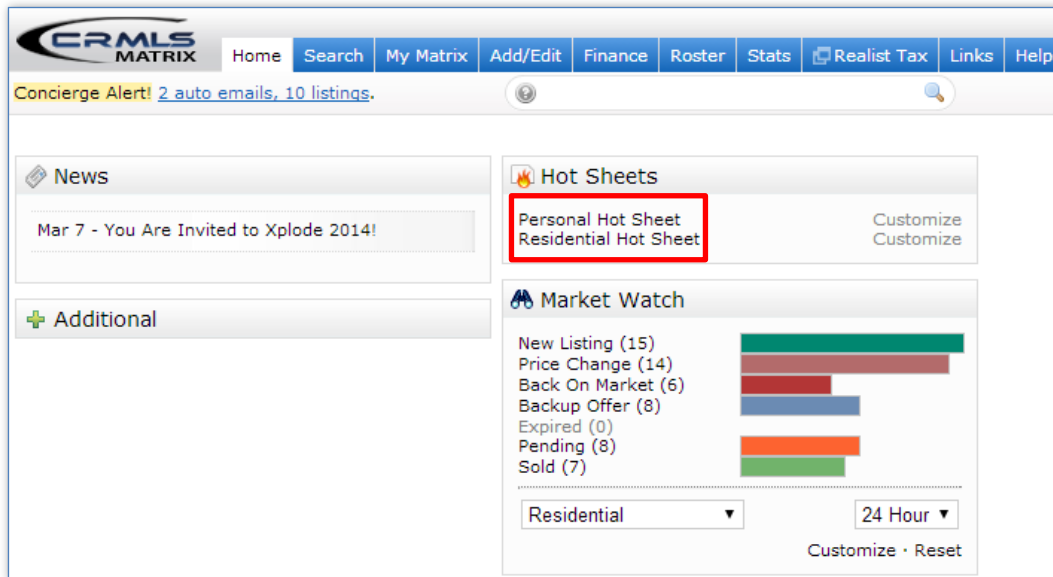


2. Select your desired Hot Sheet search criteria in the available fields and click **Save**.

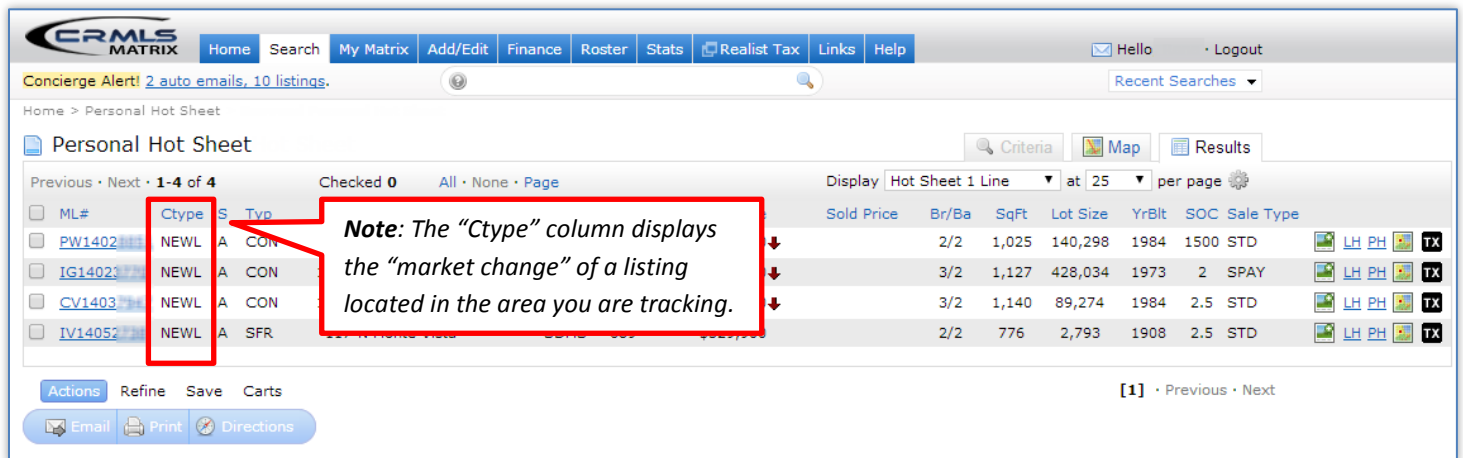


RUNNING YOUR HOT SHEETS

To run your Hot Sheet, click **Personal Hot Sheet** or **Residential Hot Sheet** on the Home tab.



After you have run a Hot Sheet, you will see a results window similar to the one below:



Hot Sheets only display listings that have had a market change since your last run date.

Refer to the table below for Change Types (Ctype) and their definitions:

Change Type (Ctype)	Definition
NEWL	New Listing
BKOF	Backup Offer
PEND	Pending
BKOM	Back On Market
PRIC	Price Change
HOLD	Hold Do Not Show
EXPD	Expired
WDRN	Withdrawn
CANC	Canceled
SOLD	Sold
LEAS	Lease

Refer to the table below for Status (S) definitions:

Status (S)	Definition
A	Active
B	Backup Offer
P	Pending
H	Hold Do Not Show
W	Withdrawn
K	Cancelled
X	Expired
S	Sold

For complete details on status definitions, refer to the [CARETS Standardized Rules and Regulations](#).

INTERMEDIATE SEARCH TECHNIQUES

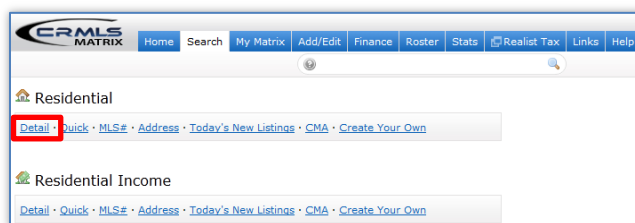
The CRMLS Matrix platform allows you to search for listings in a variety of ways. Follow the steps in these sections to search for listings.

- [“Detail Search”](#) on page [9](#)
- [“Keyword Search”](#) on page [10](#)
- [“Date Range Search”](#) on page [11](#)
- [“Creating A Custom Search”](#) on page [13](#)

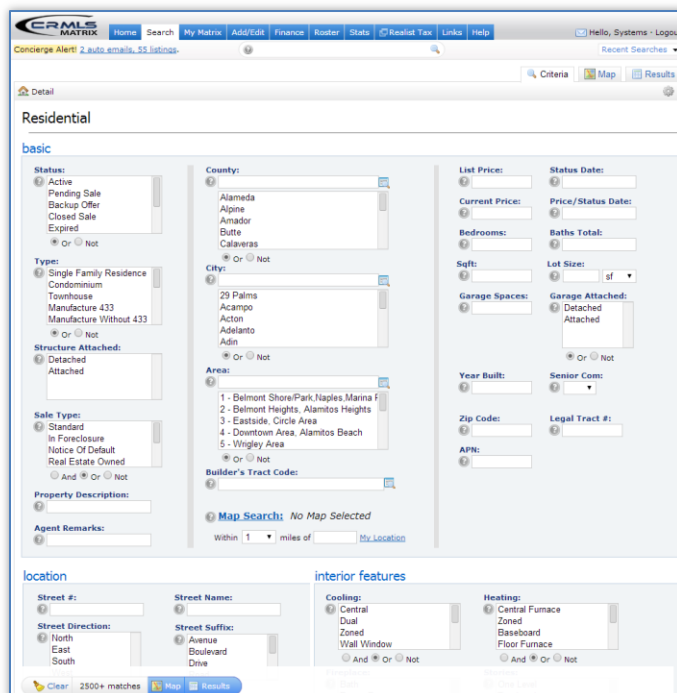
DETAIL SEARCH

The **Detail** search allows you to search for listings using all of the available search fields in the CRMLS Matrix platform. Follow the steps below to perform a **Detail** search.

1. Click the **Search** tab, then click the **Detail** link under the property type you would like to search.



2. Select your search criteria using the available fields.



KEYWORD SEARCH

Adding keywords to your searches allows you to quickly find or eliminate listings from your search results based on keywords that a listing agent may have used to describe a property in the **Property Description** or **Agent Remarks** fields.

KEYWORD INCLUSION

Use the wildcard symbol (*) to search for keywords that a listing agent may have used in the Property Description or Agent Remarks field to describe a property. For example, to search for listings that contain the word TLC, type ***TLC*** in the Property Description or Agent Remarks fields.

Note: To search for multiple keywords, separate each keyword with commas (.). For example, to include the keyword fixer and exclude the keyword short sale, type ***fixer*, !*short sale*** in the Property Description or Agent Remarks fields. The search results will return all listings that contain “fixer” but do not contain “short sale”.

KEYWORD EXCLUSION

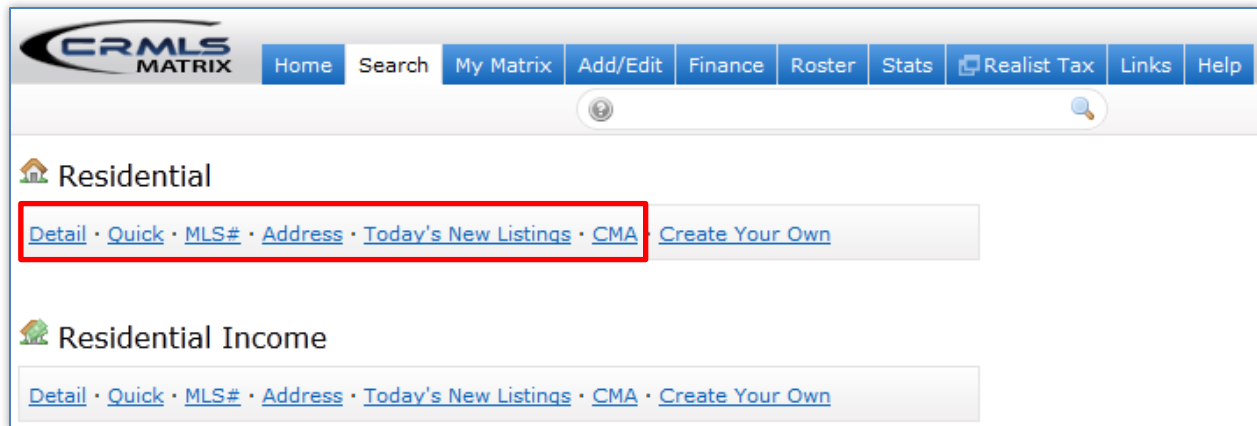
Use an exclamation mark (!) before a keyword to exclude listings that contain specific keywords that a listing agent may have used in the Property Description or Agent Remarks field to describe a property. For example, to exclude listings with the words “short sale”, type **!*short sale*** in the Property Description or Agent Remarks fields.

Note: To search for multiple keywords, separate each keyword with commas (.). For example, to include the keyword fixer and exclude the keyword short sale, type ***fixer*, !*short sale*** in the Property Description or Agent Remarks fields. The search results will return all listings that contain fixer but do not contain the short sale.

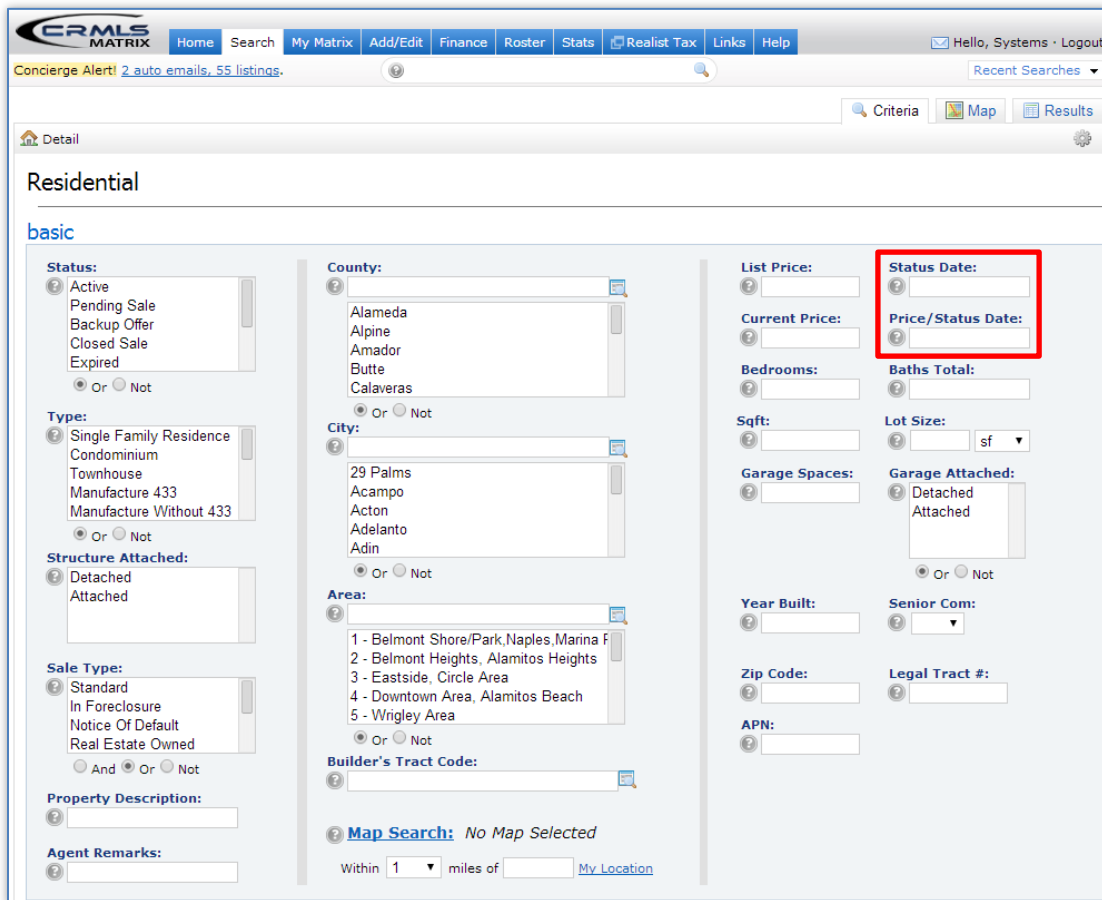
DATE RANGE SEARCH

Adding a date range to your searches allows you to search for listings based on specific date related criteria. Follow the steps below to add a date range to your search criteria.

1. From the **Search** tab, select a search link under the Property Type you would like to search.



2. Select your search criteria and enter a date range in any of the available date fields.



Refer to the table below for a list of available date fields and their definitions:

Date Field	Definition
Status Date	Use this field to search for listings that have had a status change within a specific date range.
Price/Status Date	Use this field to search for listings that went off market within a specific date range.
Listing Date	Use this field to search for listings that have a listing contract date within a specific date range.
Pending Date	Use this field to search for listings that expired within a specific date range.
Expiration Date	Use this field to search for listings that expired within a specific date range.
COE/End Date	Use this field to search for listings that closed escrow or ended within a specific date range.
Modification Date	Use this field to search for listings that were modified within a specific date range.
Date Entered	Use this field to search for listings that were entered in the MLS within a specific date range.

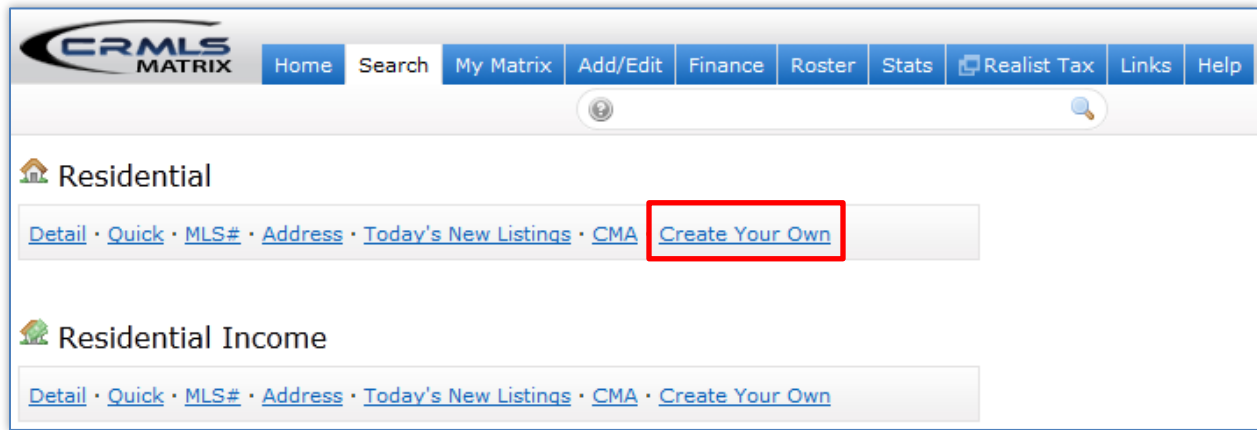
When entering dates, you can use various formats to get the results you need. Refer to the list of options below:

- To input a specific date range for example, January 1st to March 10th, enter **01/01/12-03/10/12**.
- To enter a whole number for a “day’s back” search, enter **0** which represents today’s date or **0-10** for 10 days back.
- To search for listings that are greater than the specified date use the **+** sign. For example, enter **10/1/12+** or **90+** for listings that were listed 90 days back from the specified or present date.
- To search for listings that are less than the specified date use the **-** sign. For example, enter **10/1/12-** or **90-** for listings 90 days or older than the specified or present date.

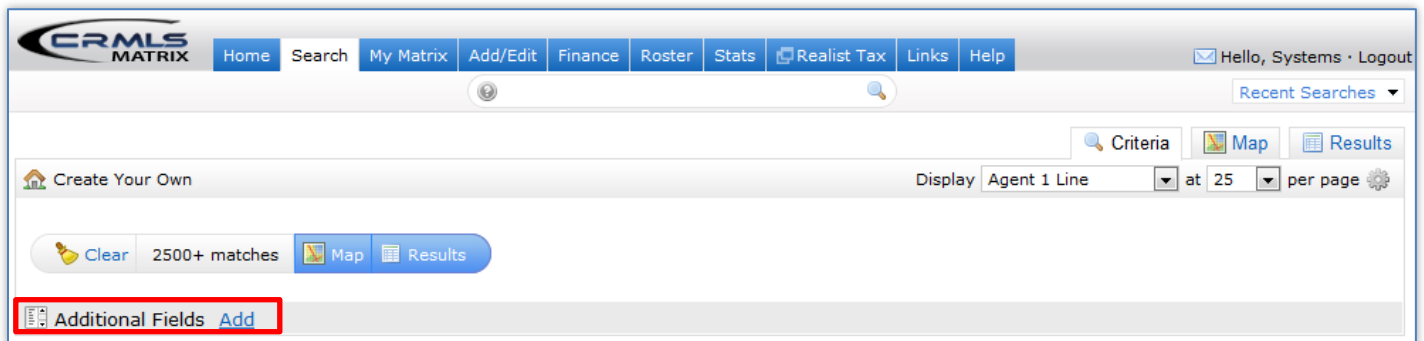
CREATING A CUSTOM SEARCH

The CRMLS Matrix platform allows you to create a custom search for each property type. Creating your own search allows you to add search fields to suit your personal preferences. Follow the steps below to create your own search page. This example demonstrates how to create a custom residential search, but the instructions for other property types are the same.

1. From the Search tab, click the **Create Your Own** link for the property type you want to create a custom search for.

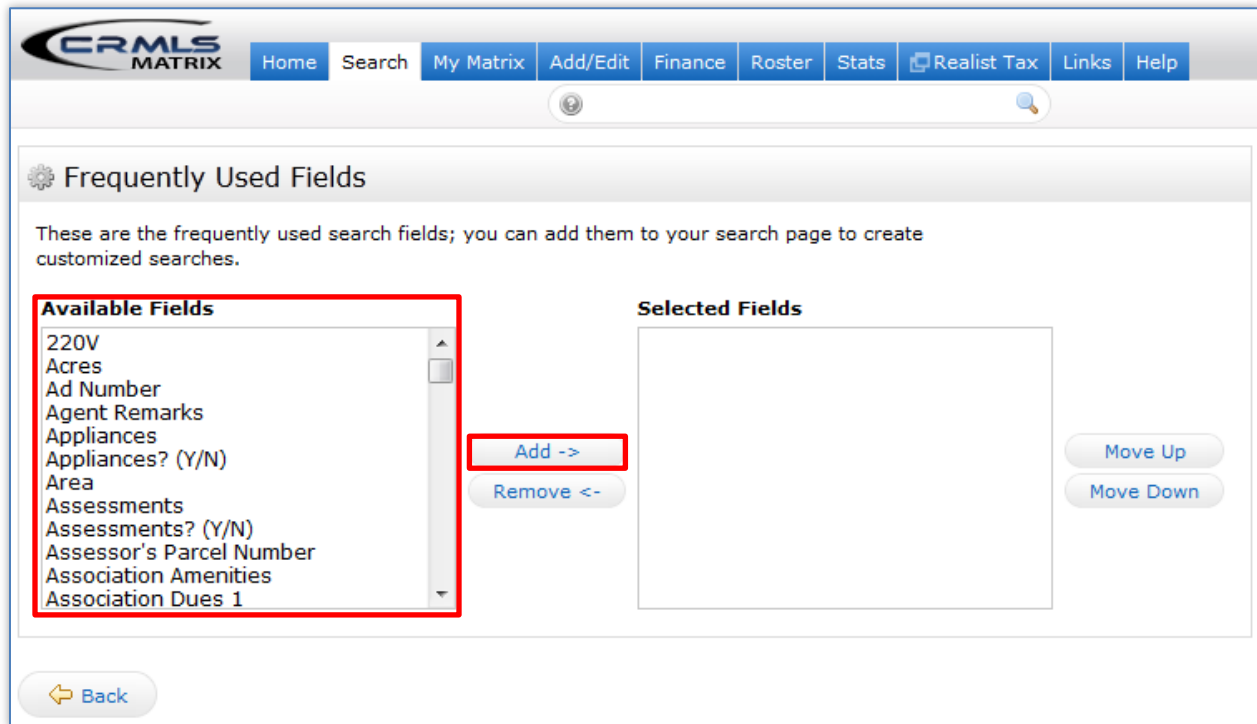


2. Click the **Add** link to add search fields for the property type you selected.



Note: The **Add Additional Fields** option is available at the bottom of all search pages for all property types.

- To add search fields, click the name of the field in the list of Available Fields, then click the **Add** button to add the selected field to your custom search.



To select multiple fields at once, hold down the **CTRL** key (Windows) or **Command** key (Mac) on your keyboard as you select the fields you want to add to your custom search.

Note: If you need to remove a field from your custom search, select the field in the **Selected Fields** list and click the **Remove** button.

- To change the order of fields on your custom search, select a field in the Selected Fields list and click the **Move Up** or **Move Down** button.

The screenshot shows the 'Frequently Used Fields' configuration page in the CRMLS MATRIX application. The page has a navigation bar with buttons for Home, Search, My Matrix, Add/Edit, Finance, Roster, Stats, Realist Tax, Links, and Help. Below the navigation bar is a search bar. The main content area is titled 'Frequently Used Fields' and includes a sub-header 'Frequently Used Fields' with a gear icon. Below this is a descriptive text: 'These are the frequently used search fields; you can add them to your search page to create customized searches.' The page is divided into two main sections: 'Available Fields' and 'Selected Fields'. The 'Available Fields' section contains a list of search fields: Accessibility Features, Acres, Ad Number, Agent Remarks, Appliances, Appliances? (Y/N), Area, Assessments, Assessments? (Y/N), Assessor's Parcel Number, Association Amenities, and Association Dues 1. The 'Selected Fields' section contains a list of selected fields: Status, Sale Type, List Price, Baths Total, and Bedrooms. Between the two sections are 'Add ->' and 'Remove <-' buttons. To the right of the 'Selected Fields' list are 'Move Up' and 'Move Down' buttons. A 'Back' button is located at the bottom left of the page. Red boxes highlight the 'Move Up' and 'Move Down' buttons in the screenshot.

- When you are done adding fields, click the **Back** button to save your changes and return to your custom search.

This screenshot is identical to the one above, showing the 'Frequently Used Fields' configuration page. The 'Available Fields' list is the same as in the previous screenshot. The 'Selected Fields' list is also the same: Status, Sale Type, List Price, Baths Total, and Bedrooms. The 'Add ->', 'Remove <-', 'Move Up', and 'Move Down' buttons are present. In this screenshot, the 'Back' button at the bottom left is highlighted with a red box.

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”](#) on page [16](#)
- [“Managing Saved Searches”](#) on page [19](#)

SAVING A SEARCH

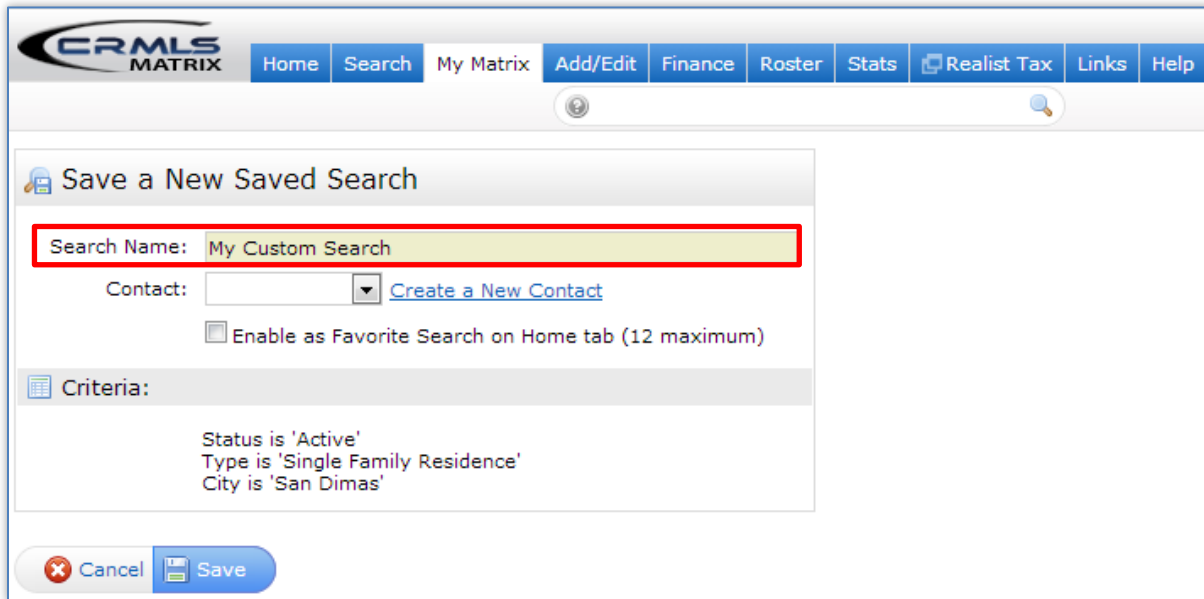
1. From the Search results page, click the **Save** button.

ML#	S	Type	St#	St Name	City	Area	SType	L/S Price	Br/Ba	YrBlt	Sqft	Ac/LSqft
AR12131781	A	TWNHS	1409	Cypress ST	SDMS	689	SPAY	\$188,000	2/1,0,0,0	1973/ASR	884	9.826/428,036
CV12133981	A	CONDO	108 W	Via Vaquero	SDMS	689	STD	\$235,000	2/2,0,0,0	1973/ASR	1,054	0.054/2,339
C12116046	A	SFR/D	417 W	4th ST	SDMS	689	STD	\$250,000	1/1,0,0,0	1908/ASR	712	0.160/6,975
IG12134790	A	CONDO/A	319	Woodglen DR	SDMS	689	SPAY	\$259,950	3/3,0,0,0	1974/ASR	1,240	0.042/1,810
E12107201	A	SFR/D	327 S	Drifton AV	SDMS	689	SPAY	\$265,000	3/1,0,0,0	1960/ASR	1,040	0.122/5,323
CV12131080	A	SFR/D	133 E	ALLEN AV	SDMS	689	STD	\$279,000	2/1,0,1,0	1957/ASR	1,055	0.219/9,537
CV12132682	A	CONDO	721	Blackrock CT	SDMS	689	STD	\$279,000	2/3,0,0,0	1986/ASR	1,459	0.087/3,785
C12049286	A	TWNHS/A	234 S	San Dimas Canyon RD	SDMS	689	STD	\$297,800	3/2,0,0,0	1973/ASR	1,368	0.072/3,145
CV12135129	A	SFR/D	425 W	4th ST	SDMS	689	STD	\$299,000	3/2,0,0,0	1910/ASR	936	0.161/7,026
S714613	A	CONDO/A	209	PONY EXPRESS RD	SDMS	689	PRO	\$299,900	2/2,0,1,0	1997/ASR	1,322	0.039/1,679

2. Click the **New Saved Search** button.

ML#	S	Type	St#	St Name	City	Area	SType	L/S Price	Br/Ba	YrBlt	Sqft	Ac/LSqft
AR12131781	A	TWNHS	1409	Cypress ST	SDMS	689	SPAY	\$188,000	2/1,0,0,0	1973/ASR	884	9.826/428,036
CV12133981	A	CONDO	108 W	Via Vaquero	SDMS	689	STD	\$235,000	2/2,0,0,0	1973/ASR	1,054	0.054/2,339
C12116046	A	SFR/D	417 W	4th ST	SDMS	689	STD	\$250,000	1/1,0,0,0	1908/ASR	712	0.160/6,975
IG12134790	A	CONDO/A	319	Woodglen DR	SDMS	689	SPAY	\$259,950	3/3,0,0,0	1974/ASR	1,240	0.042/1,810
E12107201	A	SFR/D	327 S	Drifton AV	SDMS	689	SPAY	\$265,000	3/1,0,0,0	1960/ASR	1,040	0.122/5,323
CV12131080	A	SFR/D	133 E	ALLEN AV	SDMS	689	STD	\$279,000	2/1,0,1,0	1957/ASR	1,055	0.219/9,537
CV12132682	A	CONDO	721	Blackrock CT	SDMS	689	STD	\$279,000	2/3,0,0,0	1986/ASR	1,459	0.087/3,785
C12049286	A	TWNHS/A	234 S	San Dimas Canyon RD	SDMS	689	STD	\$297,800	3/2,0,0,0	1973/ASR	1,368	0.072/3,145
CV12135129	A	SFR/D	425 W	4th ST	SDMS	689	STD	\$299,000	3/2,0,0,0	1910/ASR	936	0.161/7,026
S714613	A	CONDO/A	209	PONY EXPRESS RD	SDMS	689	PRO	\$299,900	2/2,0,1,0	1997/ASR	1,322	0.039/1,679

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

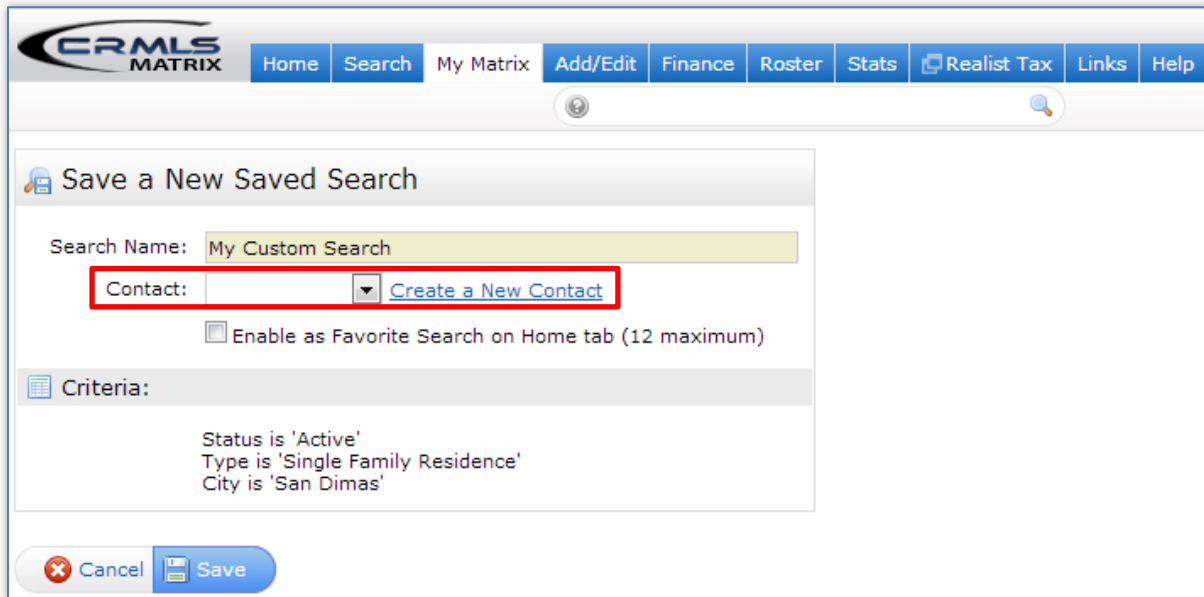


The screenshot shows the 'Save a New Saved Search' form in the CRMLS Matrix application. The navigation bar at the top includes 'Home', 'Search', 'My Matrix', 'Add/Edit', 'Finance', 'Roster', 'Stats', 'Realist Tax', 'Links', and 'Help'. The form has a search bar at the top right. The main form area is titled 'Save a New Saved Search' and contains the following fields and options:

- Search Name:** A text input field containing 'My Custom Search', highlighted with a red border.
- Contact:** A dropdown menu currently empty, with a 'Create a New Contact' link next to it.
- Enable as Favorite Search on Home tab (12 maximum)**
- Criteria:** A section with the following text:
 - Status is 'Active'
 - Type is 'Single Family Residence'
 - City is 'San Dimas'

At the bottom of the form are 'Cancel' and 'Save' buttons.

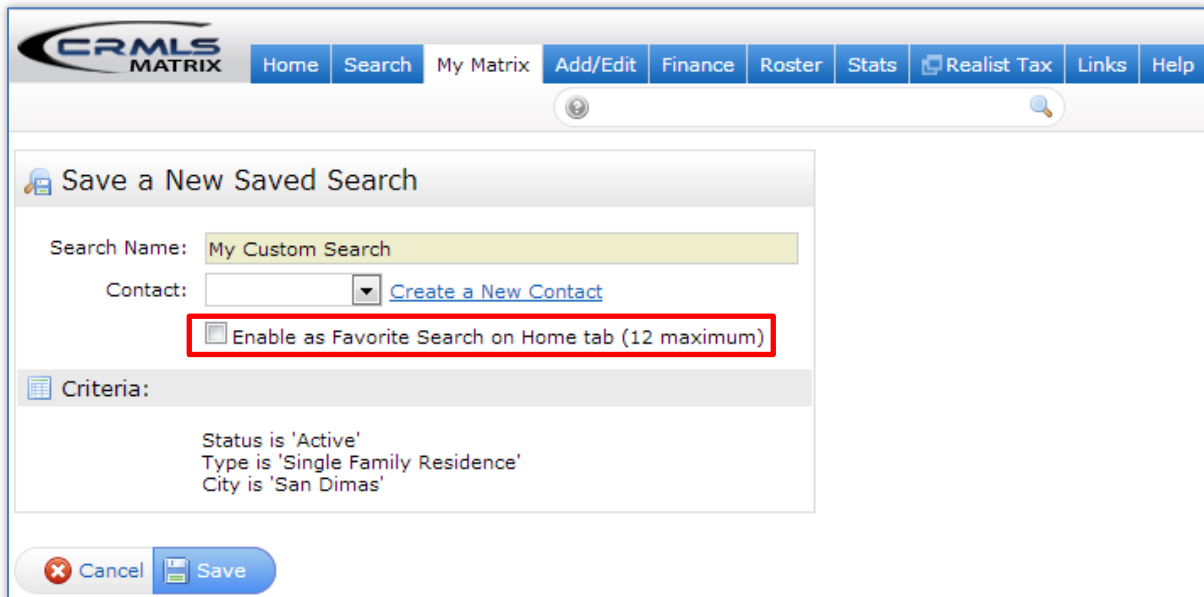
4. To assign the saved search to one of your contacts, select a contact in the Contact drop-down list.



This screenshot is identical to the previous one, but the 'Contact' dropdown menu and the 'Create a New Contact' link are highlighted with a red border, indicating the next step in the process.

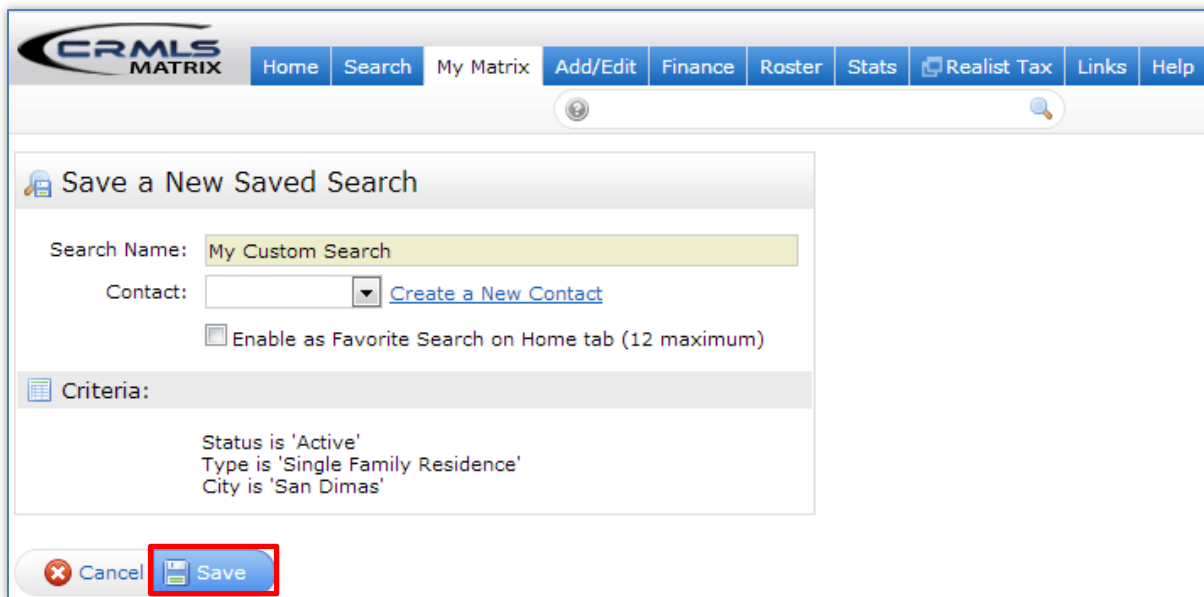
Note: If you are saving the search for a new client that is not already in your contact list, click the **Create a New Contact** link to add the client to your contacts.

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



The screenshot shows the 'Save a New Saved Search' form in the CRMLS Matrix application. The form includes a search name field with 'My Custom Search', a contact dropdown menu, and a checkbox labeled 'Enable as Favorite Search on Home tab (12 maximum)'. Below the checkbox is a 'Criteria' section with the following text: 'Status is 'Active'', 'Type is 'Single Family Residence'', and 'City is 'San Dimas''. At the bottom of the form are 'Cancel' and 'Save' buttons. The checkbox is highlighted with a red rectangle.

- When you are done, click **Save** to save your search.

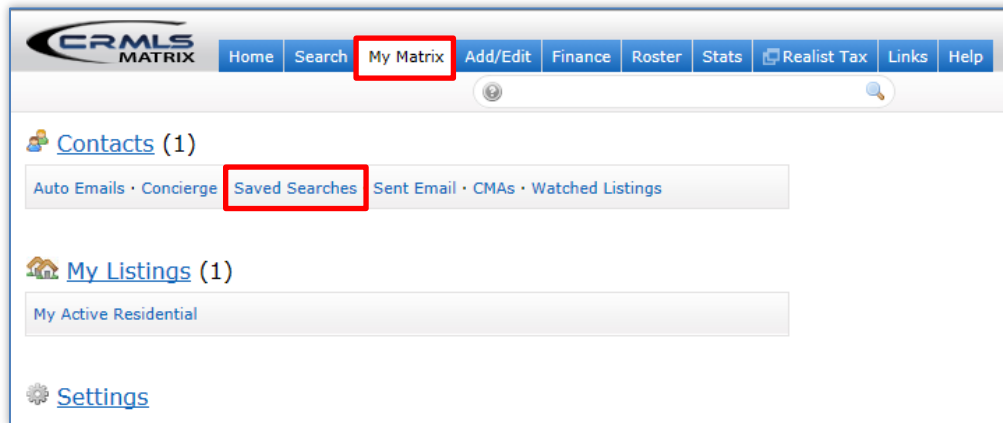


The screenshot shows the 'Save a New Saved Search' form in the CRMLS Matrix application, identical to the previous one. The 'Save' button at the bottom right is highlighted with a red rectangle.

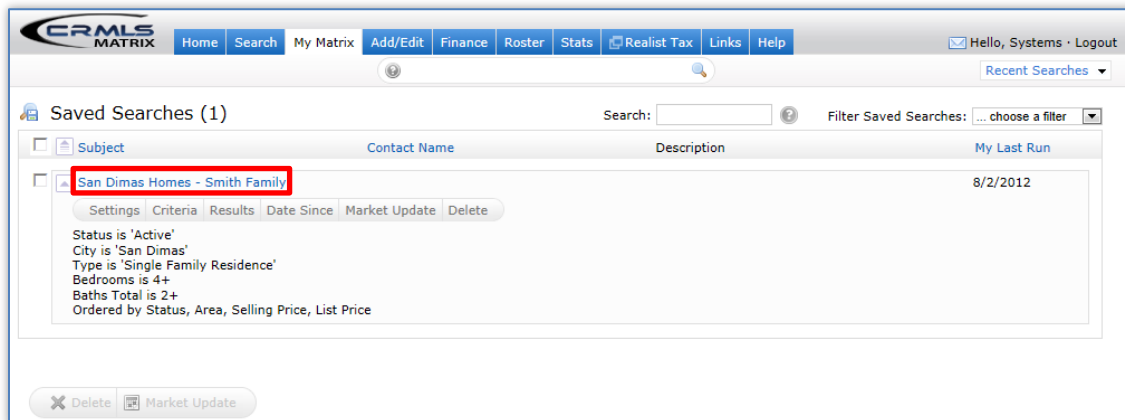
MANAGING SAVED SEARCHES

Follow the steps below to manage your saved searches.

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



2. Click a saved search to display a list of options for the saved search.



3. To manage your saved search, do the following:
 - Click **Settings** to change the Search Name, the client it is assigned to, enable/disable it as a Favorite Search, or to convert it to an Auto Email.
 - Click **Criteria** to update the Saved Search's search criteria.
 - Click **Results** 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.

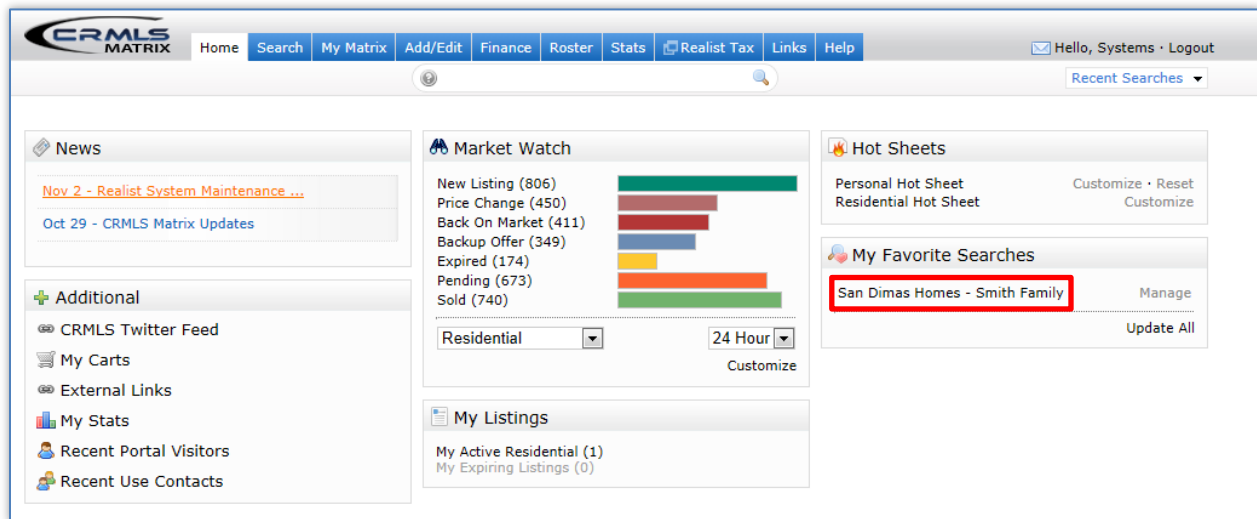
Note: Use the **Filter Saved Searches** drop-down list to quickly sort and find your saved searches.

4. To delete a saved search, click the checkbox next to the search name, then click **Delete**.

MY FAVORITE SEARCHES

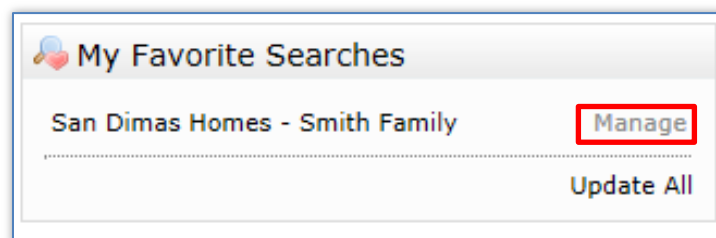
The CRMLS Matrix platform allows you to add up to 12 of your most commonly used searches to the My Favorite Searches widget on the CRMLS Matrix Home page. To add a saved search to the **My Favorite Searches** widget, click the [Enable as Favorite Search](#) checkbox when saving your search or click the checkbox on an Auto Email's settings page.

To run a Favorite Saved Search, click the name of a Favorite Search in the widget to view new and updated listings. The results of your Favorite Search will display only new and updated listings since you last checked the results or ran a full search.



Note: To view the number of new and updated listings for all of your Favorite Searches, click **Update All**. The results will display a list of all unviewed listings only and will remain in the results until you view the listings.

To modify your Favorite Searches, click **Manage**, then see [Managing Saved Searches](#) on page [19](#) for details.



SEARCHING WITH SPEED BAR

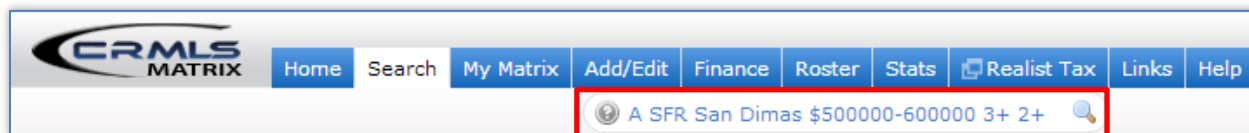
The CRMLS Matrix platform's Speed Bar allows you to use specific keywords to search for listings, open houses, and agents in a single search field. Follow the steps in these sections to search using the Speed Bar and to save and manage your Speed Bar shortcuts.

- [“Using Speed Bar Shortcuts”](#) on page [21](#)
- [“Saving Speed Bar Shortcuts”](#) on page [22](#)
- [“Using Saved Speed Bar Shortcuts”](#) on page [23](#)
- [“Modifying or Deleting Speed Bar Shortcuts”](#) on page [23](#)

USING SPEED BAR SHORTCUTS

The Speed Bar is available just below the menu bar as you navigate throughout Matrix. The Speed Bar uses shorthand search criteria to perform searches across various fields in Matrix. By default the Speed Bar searches for residential listings only unless you specify a different property type. Follow the steps below to search using the Speed Bar.


1. Type your search criteria into the Speed Bar and include a space after each criterion.



In this example, we will be searching for Active listings (**A**) that are Single Family Residence (**SFR**) homes in the City of **San Dimas**, priced between \$500,000 to \$600,000 (**\$500000-600000**) with three or more bedrooms (**3+**) and two or more bathrooms (**2+**). Note that the shorthand search criteria used for the above search would be: **A SFR San Dimas \$500000-600000 3+ 2+**.

Note: When entering bedrooms and bathrooms in the Speed Bar, always enter the number of bedrooms before the number of bathrooms.

For a list of available shorthand search options, click the  question mark icon next to the Speed Bar.

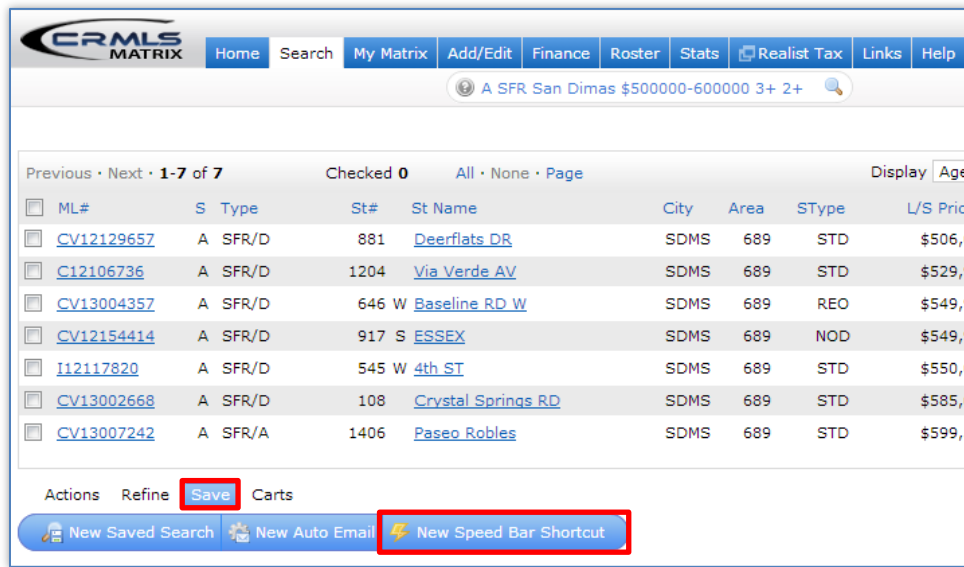
2. When you are done entering your search criteria, press the **Enter** key on your keyboard or click the  magnifying glass icon to the right of the Speed Bar to see your search results.



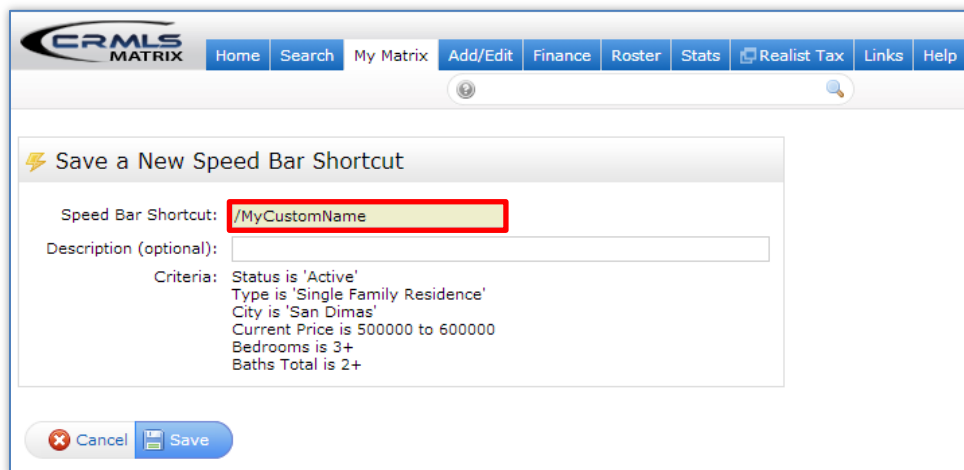
SAVING SPEED BAR SHORTCUTS

Speed Bar Shortcuts allow you to save your Speed Bar search criteria for quick access.

1. From the Search Results, click the **Save** button, then click the **New Speed Bar Shortcut** button.



2. On the **Save a New Speed Bar Shortcut** page, type the Speed Bar Shortcut name you would like to use. Your shortcut name must begin with a forward slash "/" and may include alpha numeric characters and the "&", "-", and "_" symbols.



Note: All shortcut names must be less than 20 characters long and **must begin with a forward slash "/"**. A shortcut name may not include spaces, symbols, or punctuation. Shortcuts are not case-sensitive.

3. Enter a Description to help you easily identify the shortcut.
4. When you are done, click the **Save** button to save your Speed Bar shortcut.

USING SAVED SPEED BAR SHORTCUTS

Follow the steps below to search for listings using your saved Speed Bar Shortcuts.

1. Type a forward slash “/” in the Speed Bar followed by your shortcut name.

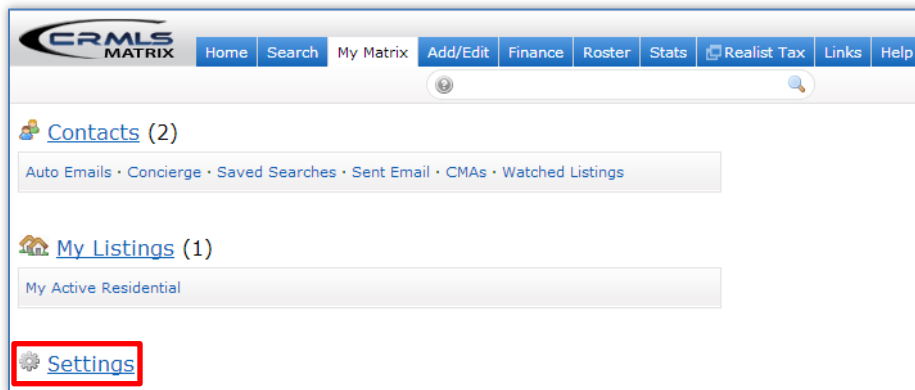


2. Press the Enter key on your keyboard or click the magnifying glass icon in the Speed Bar. This will run your search and display the Search Results.

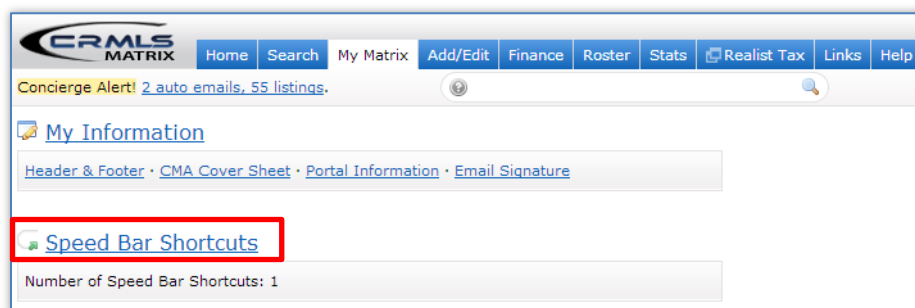
MODIFYING OR DELETING SPEED BAR SHORTCUTS

Follow the steps below to modify or delete Speed Bar Shortcuts.

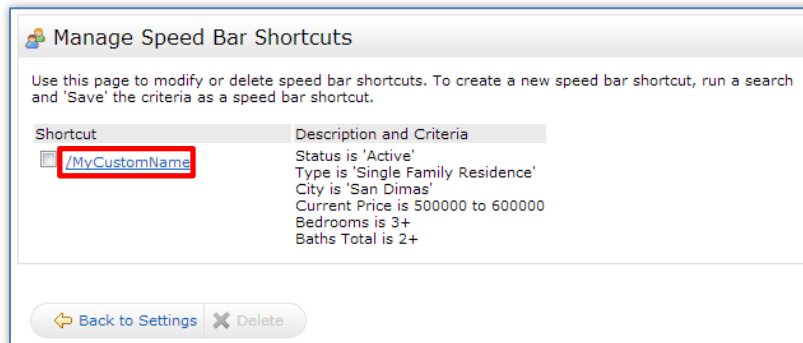
1. Click the Settings link on the My Matrix tab.



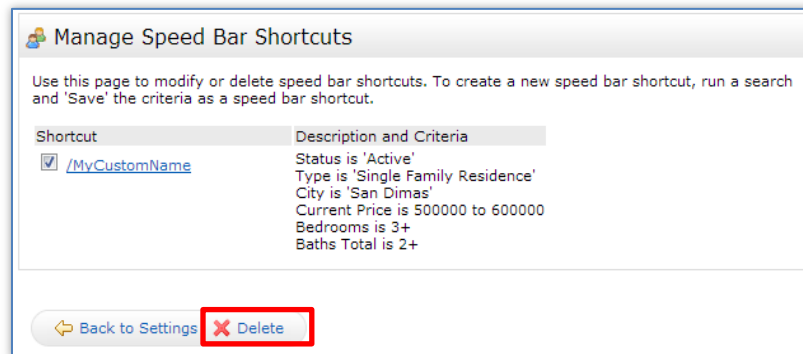
2. Click the **Speed Bar Shortcuts** link.



To modify the search criteria of a Speed Bar shortcut, click the name of the shortcut, update your search criteria, then click the **Save** button.



To delete a Speed Bar shortcut click the checkbox next to the shortcut you want to delete, then click the **Delete** button.



MANAGING CONTACTS

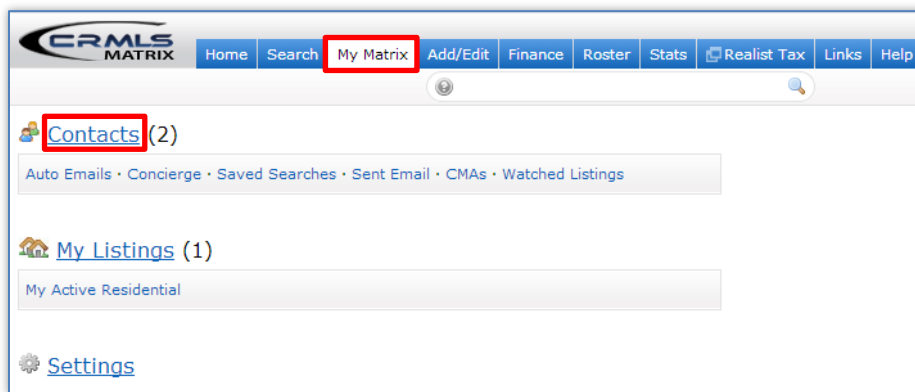
Follow the steps in these sections to add and manage contacts in the Matrix platform.

- [“Adding Contacts”](#) on page [25](#)
- [“Importing Multiple Contacts”](#) on page [26](#)
- [“Viewing Contacts”](#) on page [28](#)
- [“Managing Contacts”](#) on page [29](#)

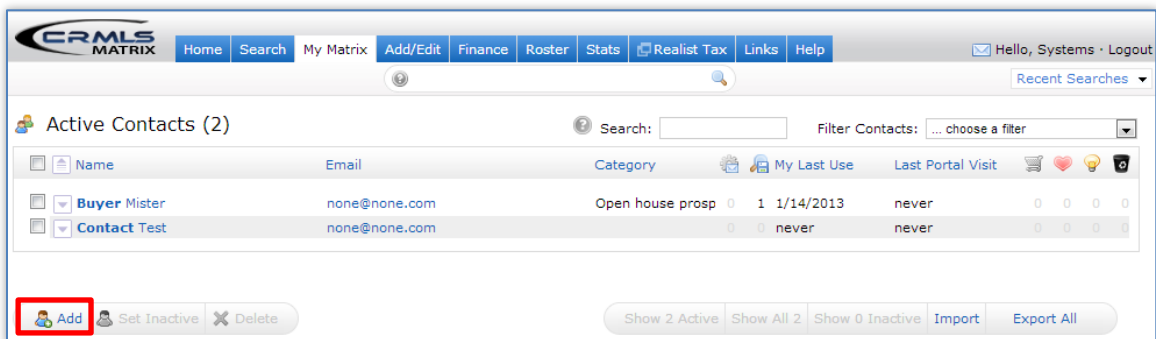
ADDING CONTACTS

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

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

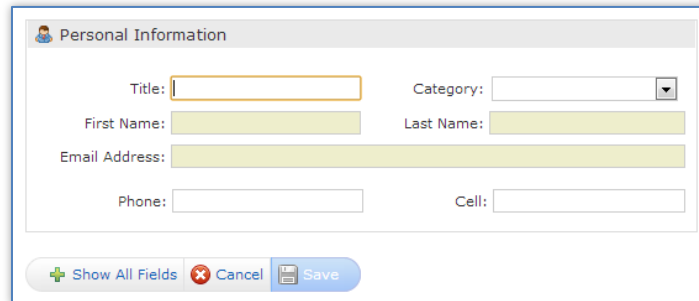


2. Click the **Add** button to add a new contact.



Note: To add multiple contacts at once, see [“Importing Multiple Contacts”](#) on page [26](#).

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



A screenshot of a 'Personal Information' form. The form contains several input fields: 'Title', 'Category' (a dropdown menu), 'First Name', 'Last Name', 'Email Address', 'Phone', and 'Cell'. The 'First Name', 'Last Name', and 'Email Address' fields are highlighted in yellow, indicating they are required. At the bottom of the form, there are three buttons: '+ Show All Fields', 'Cancel', and 'Save'.

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

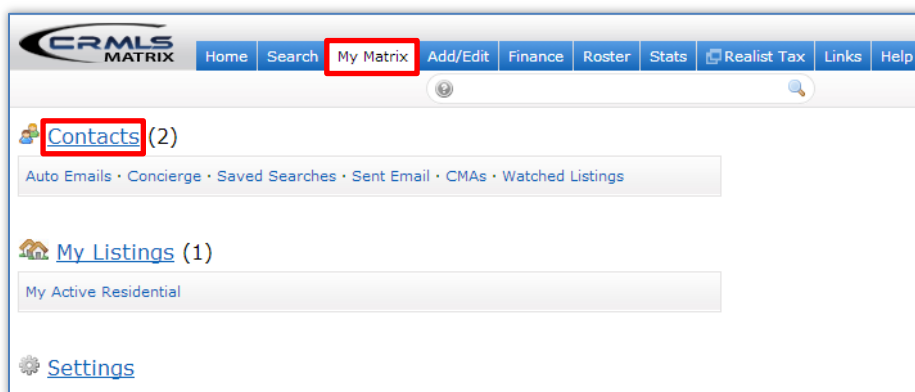
4. Click **Save** to save your client's contact information.

IMPORTING MULTIPLE CONTACTS

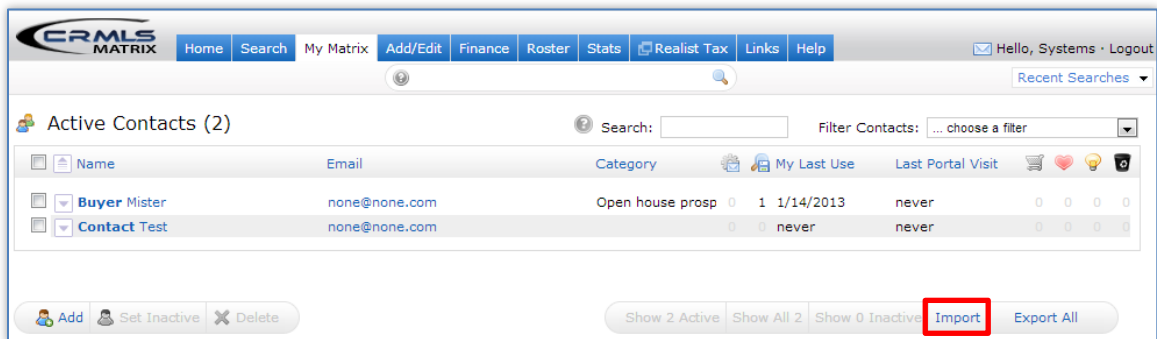
Before you begin, make sure that you have exported your contacts from Microsoft Outlook or another contact management system in Comma Separated Values (CSV) format. Then follow the steps below to import your contacts.

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

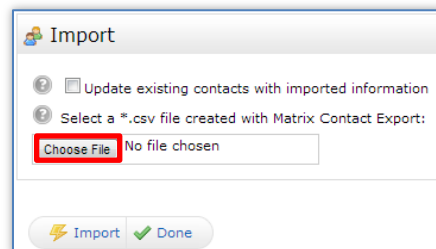
1. Click the **Contacts** link on the **My Matrix** tab.



2. Click the **Import** button.



3. Click **Choose File** to browse your computer and locate the exported CSV file.

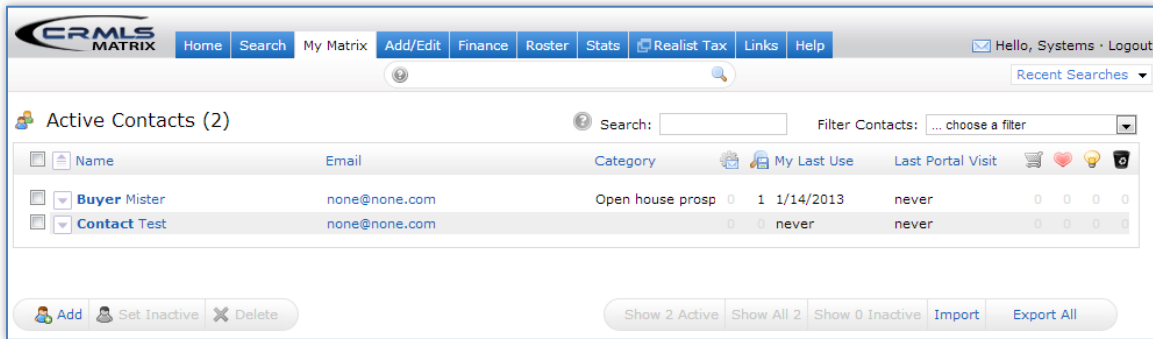


Note: To update existing contacts with the information in your CSV file, click the **Update existing contacts with imported information** checkbox.

4. Click **Import** to import your contacts.
5. When the import is complete, you will 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 contact's name.

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

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

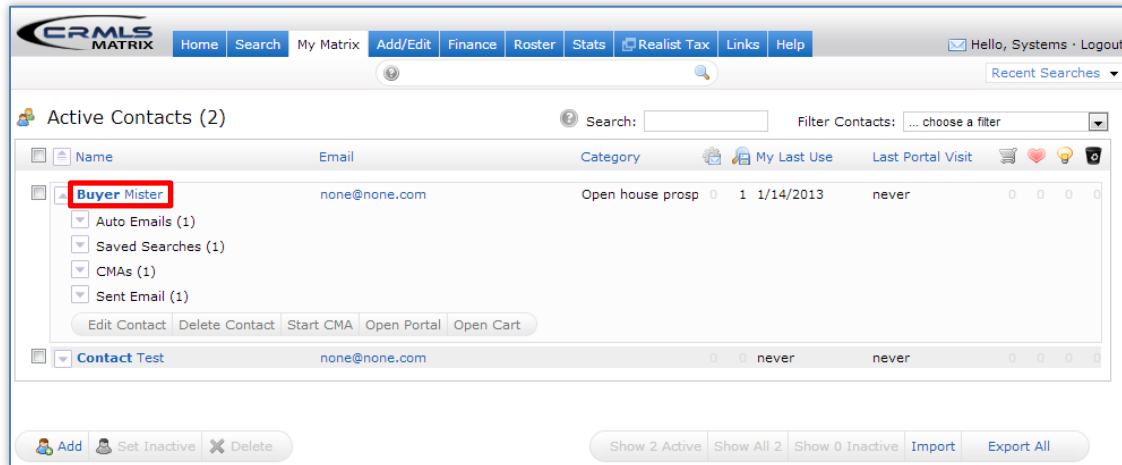
You can further narrow down your contacts, by selecting any of the options in the **Filter Contacts** drop-down menu.

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 contact's name 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 **Auto Emails** to view and edit auto-email settings for your client. (See "[Managing Auto Emails](#)" on page 44 for details.)
- Click **Saved Searches** to view and edit previously saved searches. (See "[Managing Saved Searches](#)" on page 19 for details.)
- Click **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 56 for details.)
- Click the checkbox next to a contact and click the **Delete** button 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

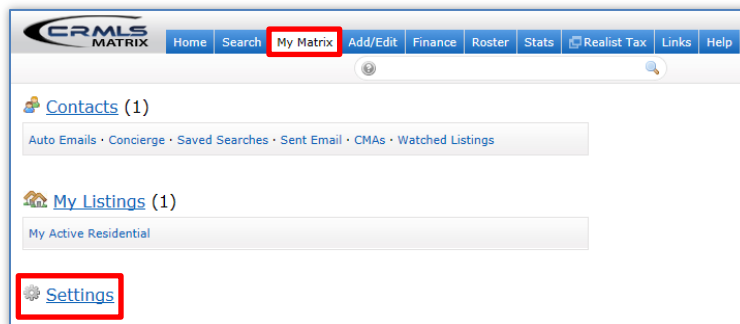
Before you send emails to your clients, you should create an email signature and customize your header/footer for the Client Portal and printed reports. Follow the steps in these sections to get started.

- [“Creating an Email Signature”](#) on page [30](#)
- [“Customizing Your Header/Footer”](#) on page [31](#)

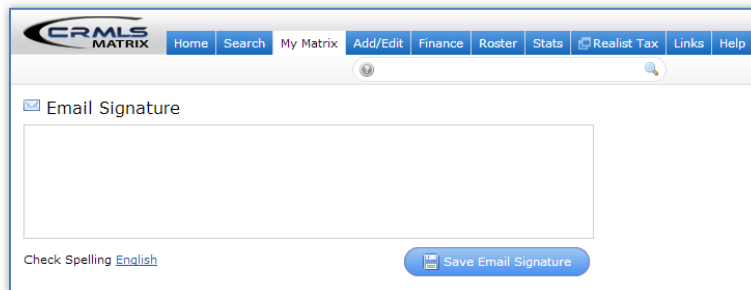
CREATING AN EMAIL SIGNATURE

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.

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



2. Enter your email signature in the **Email Signature** field.

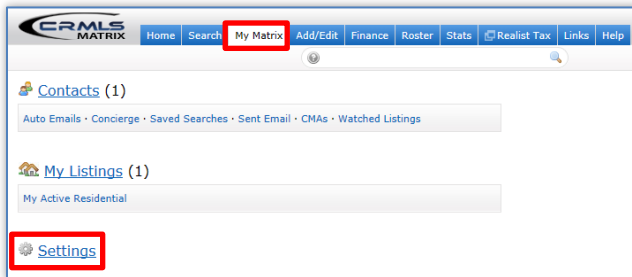


3. Click the **English** link to spell check your email signature.
4. Click the **Save Email Signature** button when you are done entering your email signature.

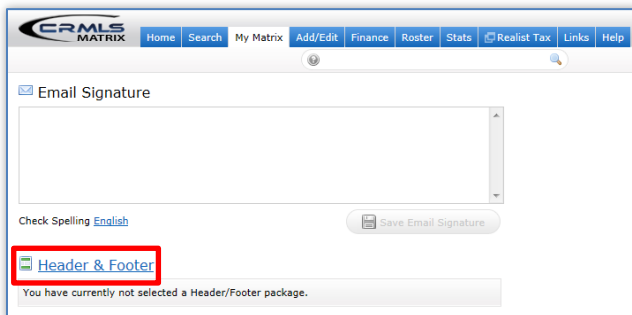
CUSTOMIZING YOUR HEADER/FOOTER

The CRMLS Matrix platform allows you to create a Header and Footer with a custom picture, logo, motto, and personal contact information that is appended to emails and on your printed displays and reports. Follow the steps below to customize your Header and Footer.

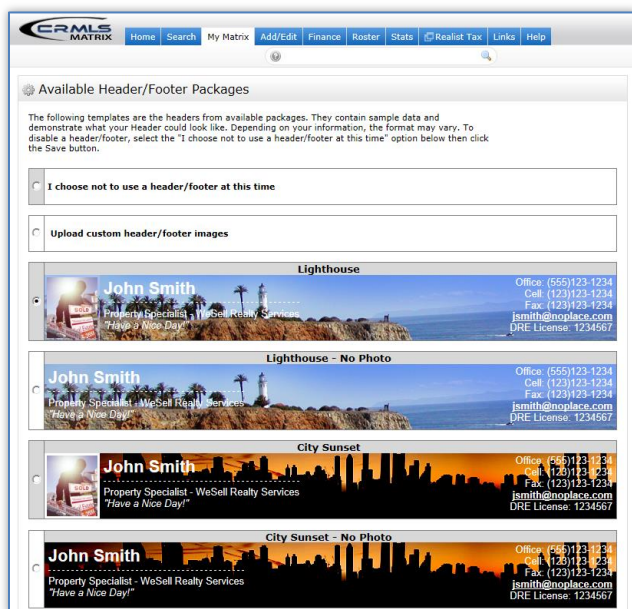
1. Click the **Settings** link on the **My Matrix** Tab.



2. Click the **Header & Footer** link.

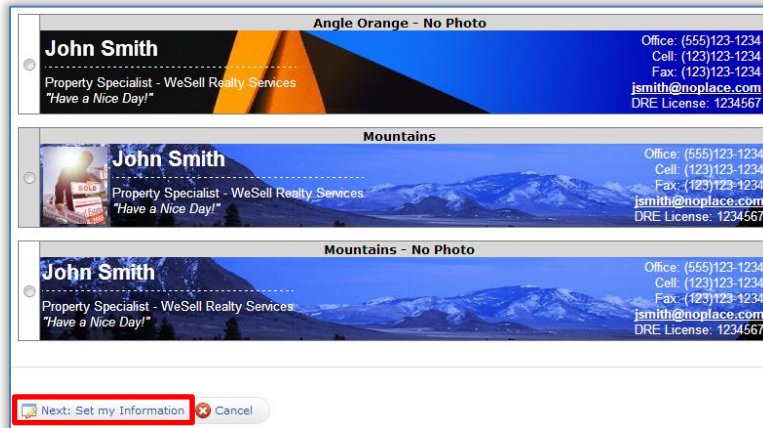


3. Select one of the Available Header/Footer Packages.

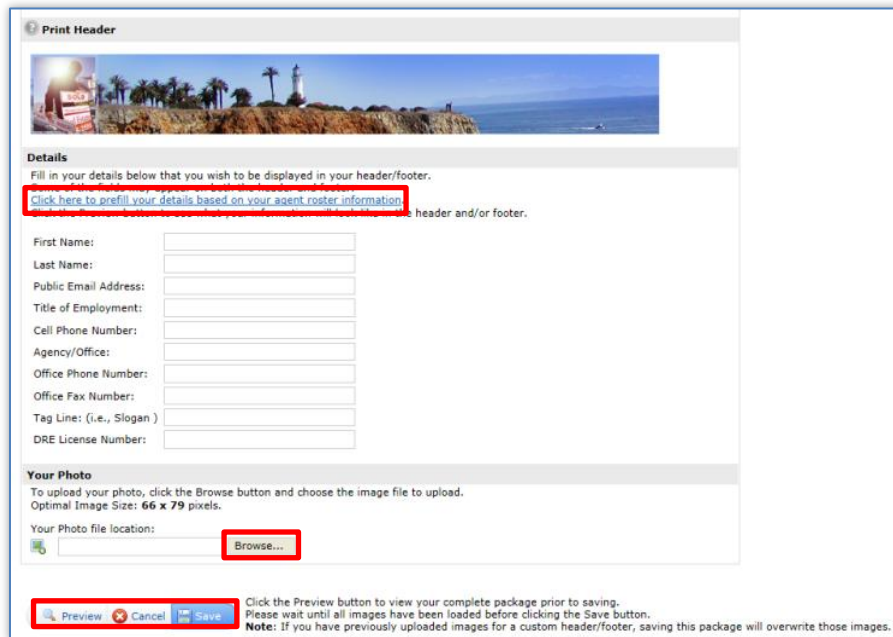


Note: If you do not want to include your photo in the header/footer, select one of the No Photo headers/footers.

- Click the **Next: Set my Information** button when you are done selecting a header/footer package.



- 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. Alternatively, you can manually enter your contact information or update information as needed. The information you enter will be displayed on all of your client portal and report headers and footers.



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

EMAILING LISTINGS

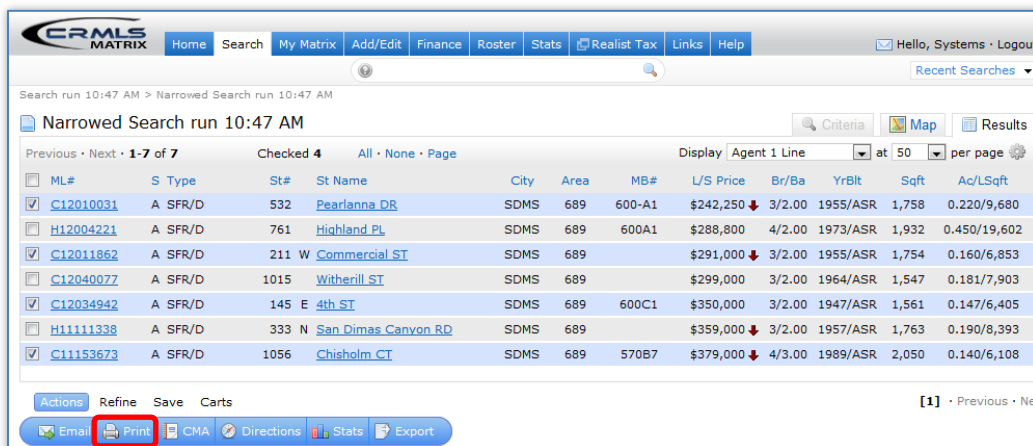
The CRMLS Matrix platform allows you to email listings as reports in PDF format. Listings can also be emailed as links to a client portal so that your clients will receive the most up to date information for the listings you have emailed.

- [“Emailing Listings as Reports”](#) on page 33
- [“Emailing Listings as Links”](#) on page 35

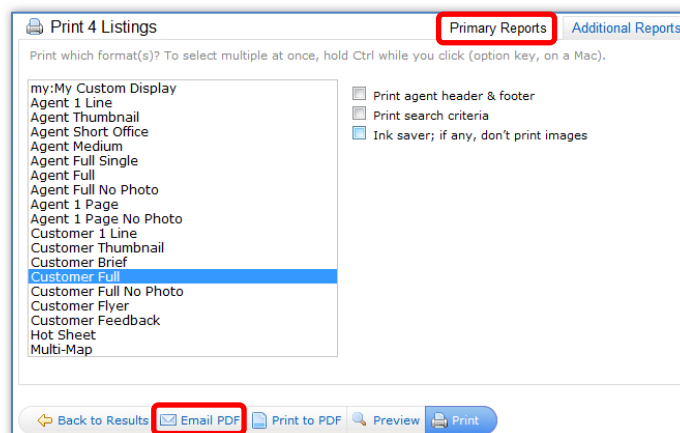
EMAILING LISTINGS AS REPORTS

Follow the steps below to email listings as a PDF report. Before you begin, make sure that you have performed a search as described in the “Searching for Listings” section on page 13 of the [Basic Matrix manual](#).

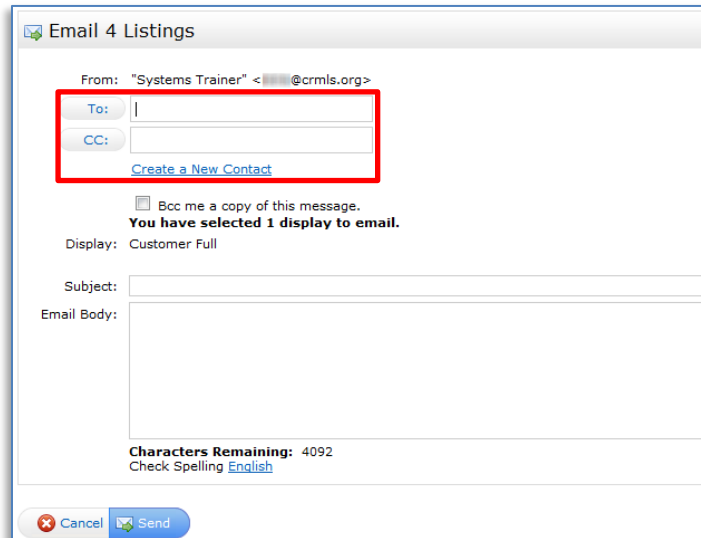
1. Click the check box next to each listing you want to email.
2. Click the **Print** button.



3. Select any of the customer displays (from the **Primary Reports** tab) or customer reports (from the **Additional Reports** tab) you want to email, then click the **Email PDF** button.



4. Click the **To:** button to select a recipient from your contact list. You can also manually type your client's email address in the **To:** field. Click the **CC:** button to select a recipient you wish to send a copy of the email to, or manually type the address into the CC: field. Separate multiple recipients by putting a semi-colon (;) after each entry. All recipients will receive the same link to view listings in their shared portal.



From: "Systems Trainer" <[redacted]@crmls.org>

To: |

CC: |

[Create a New Contact](#)

Bcc me a copy of this message.
You have selected 1 display to email.

Display: Customer Full

Subject: |

Email Body: |

Characters Remaining: 4092
[Check Spelling English](#)

Note: To select more than one contact in your contact list, hold down the **CTRL** key on your keyboard as you select them.

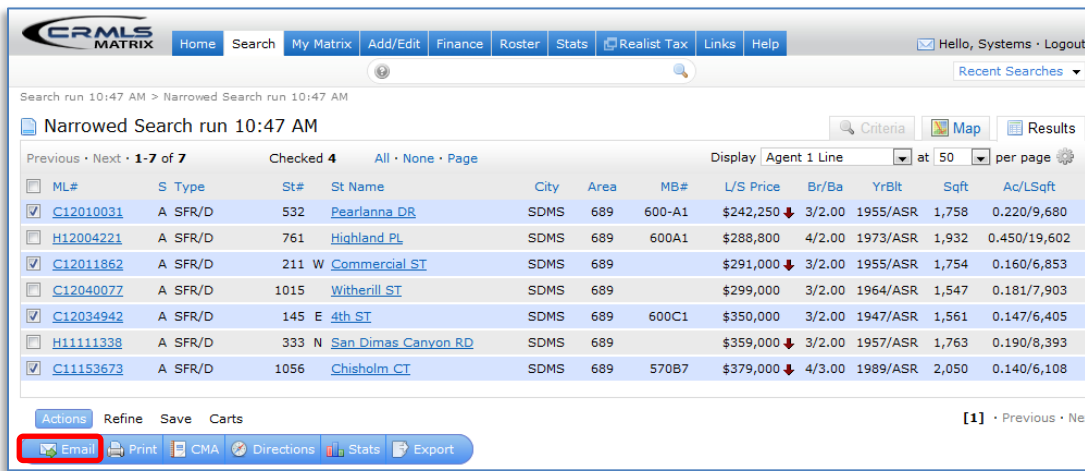
If your email address does not appear in the **From:** field, you will need to add it to the Agent Roster (see the "Updating Your Contact Information" section on page 33 in the [Basic Matrix manual](#) for details).

5. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you are sending.
6. Enter a subject for the email in the **Subject** field.
7. Enter a message for your client in the **Email Body** field.
8. Click the **English** link to spell check the message you typed in the Email Body field.
9. Click the **Send** button to email the selected display or report to your client in PDF format.

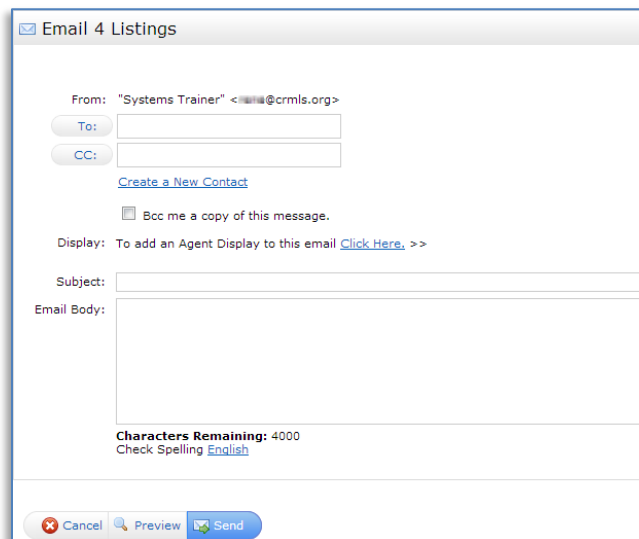
EMAILING LISTINGS AS LINKS

Follow the steps below to email listings as links to a client portal. Before you begin, make sure that you have performed a search as described in the “Searching for Listings” section on page 13 of the [Basic Matrix](#) manual.

1. Click the check box next to each listing you want to email.
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 email address in the **To:** field. Separate multiple recipients by typing a semi-colon (;) after each email address.



Note: To select more than one contact in your contact list, hold down the **CTRL** key on your keyboard as you select them.

4. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you are sending.
5. Enter a subject for the email in the **Subject** field.
6. Enter a message for your client in the **Email Body** field.
7. Click the **English** link to spell check the message you typed in the email body field.
8. Click the **Preview** button to preview how the properties will appear to your recipient once they click on the link contained in their email.

Systems Trainer

Office: 800-925-1525
Fax: 909-859-2050

California Regional MLS

These Listings were manually emailed to you on Wednesday, June 20, 2012 9:31 AM.

1-4 of 4

[1] · Previous · Next · Bottom

Received	ML#	Status	St#	Street Name	City	Area	MB#	L/S Price	CDOM	Br/Ba	Sqft	Built
<input type="checkbox"/>	F12038025	Active	331 W	Baseline RD	SDMS	689		\$220,000	18	3/1	1,393 (A)	1952/ASR
<input type="checkbox"/>	M12027225	Active	305 W	3rd St	SDMS	689		\$250,000	41	2/1	840 (A)	1925/ASR
<input type="checkbox"/>	22160412	Active	117 W	COMMERCIAL ST	SDMS	689	600B2	\$279,500 ↓	84	2/1	960 (P)	1912/ASR
<input type="checkbox"/>	C12034052	Active	1240	Hidden Creek RD	SDMS	689	570A6	\$290,000 ↓	27	3/3	1,321 (A)	1987/ASR

[1] · Previous · Next · Top

Print Map

Display: Public - 1 Line at 10 per page.

9. Click the **Send** button to email the selected listings as links to your client.

EMAILING LISTINGS AUTOMATICALLY (AUTO EMAILS)

Auto Emails allow you to quickly and easily turn search results and saved searches into automatic email updates that instantly notify your clients of new and changed listings. Before you begin, make sure that you have created an email signature and set up your header/footer information as described in [“Customizing Email Settings”](#) on page 30. Then follow the steps in these sections to get started.

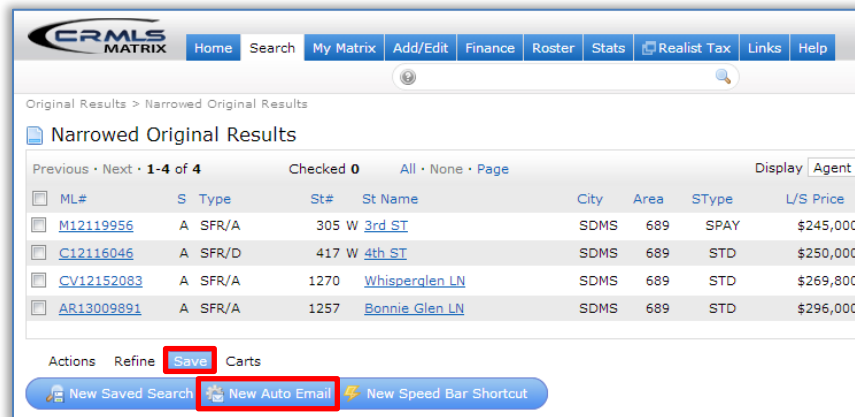
Note: For complete control over the listings that are sent to your clients, enable concierge mode for your auto emails to approve or reject listings before sending them to your client. See [“Auto Email Concierge”](#) on page 46 for details.

- [“Creating Auto Emails from Search Results”](#) on page 37
- [“Creating Auto Emails from Saved Searches”](#) on page 40
- [“Managing Auto Emails”](#) on page 44

CREATING AUTO EMAILS FROM SEARCH RESULTS

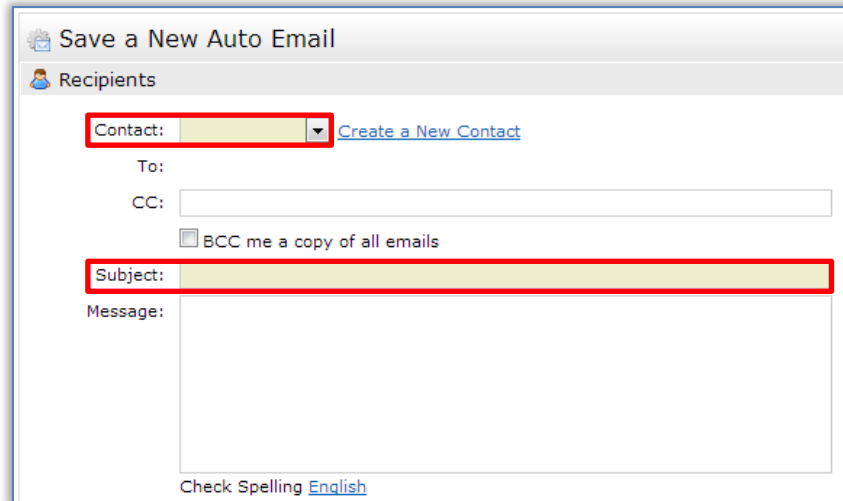
Follow the steps below to create Auto Emails from any Search Results page in the CRMLS Matrix platform.

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



Note: In Matrix, you can enable up to 250 Auto Emails and have an unlimited number of saved searches.

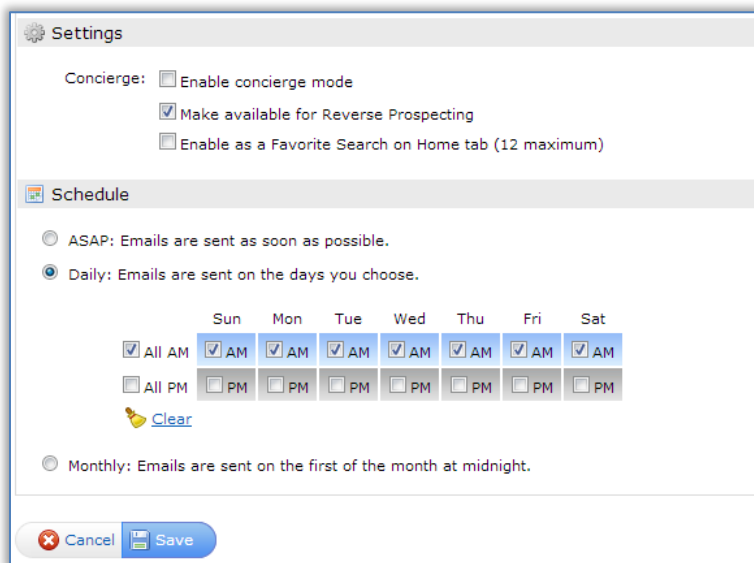
2. On the **Save a New Auto Email** page, select a contact from the **Contact** drop-down list to assign the auto email to an existing contact. To add a new contact, click the **Create a New Contact** link, then follow the prompts on the screen.



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, input 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. Matrix will automatically populate 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.



Settings

Concierge: Enable concierge mode
 Make available for Reverse Prospecting
 Enable as a Favorite Search on Home tab (12 maximum)

Schedule

ASAP: Emails are sent as soon as possible.
 Daily: Emails are sent on the days you choose.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

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

Note: For complete control over listings sent to your clients when using the Auto Email feature, refer to “[Auto Email Concierge](#)” on page [46](#) for details.

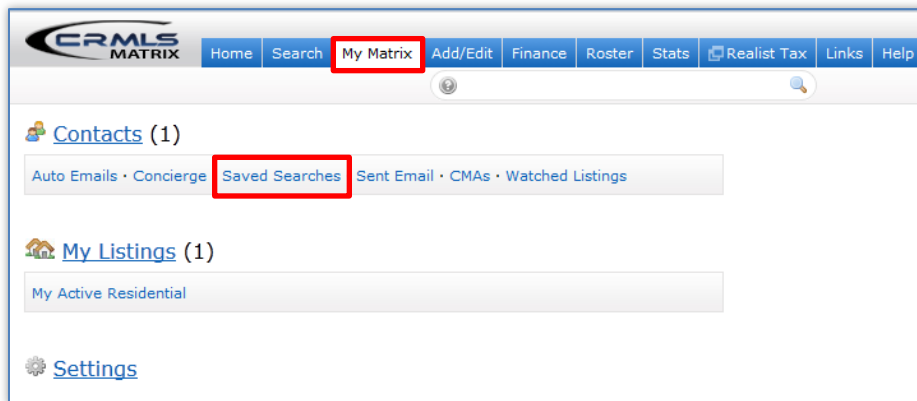
9. Select **Enable as a Favorite Search** to add the search to the Favorites Searches list on the Matrix **Home** tab.
10. Select a Schedule setting to specify when auto emails are sent to your client. The **ASAP** setting sends auto emails as soon as possible, the **Daily** setting sends emails every day selected at 8:00AM or 6:00PM, 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.

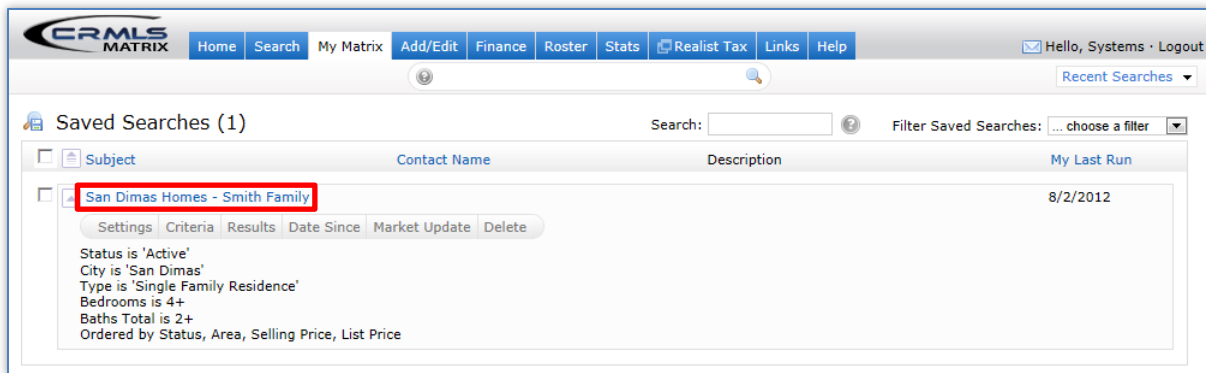
CREATING AUTO EMAILS FROM SAVED SEARCHES

Follow the steps below to create Auto Emails from your Saved Searches in the CRMLS Matrix platform.

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

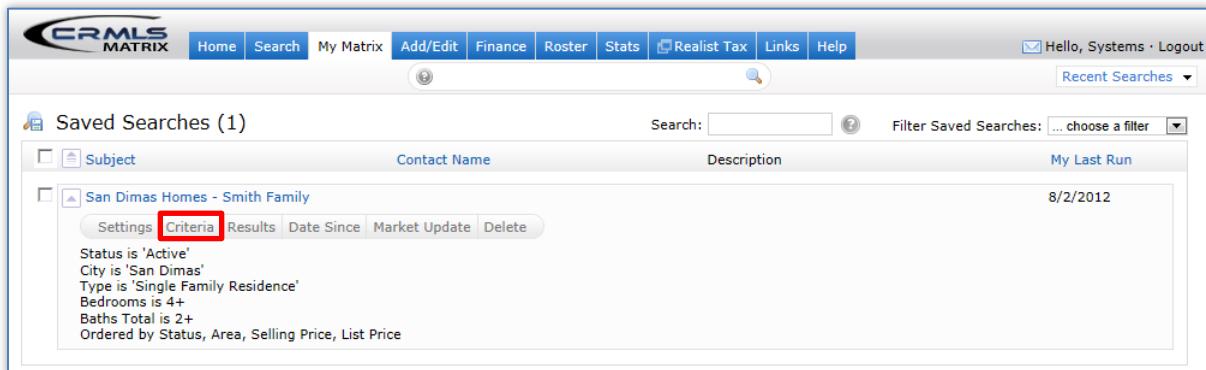


2. Locate the Saved Search you want to turn into an Auto Email.
3. Click the name of the Saved Search to display the Saved Search options.

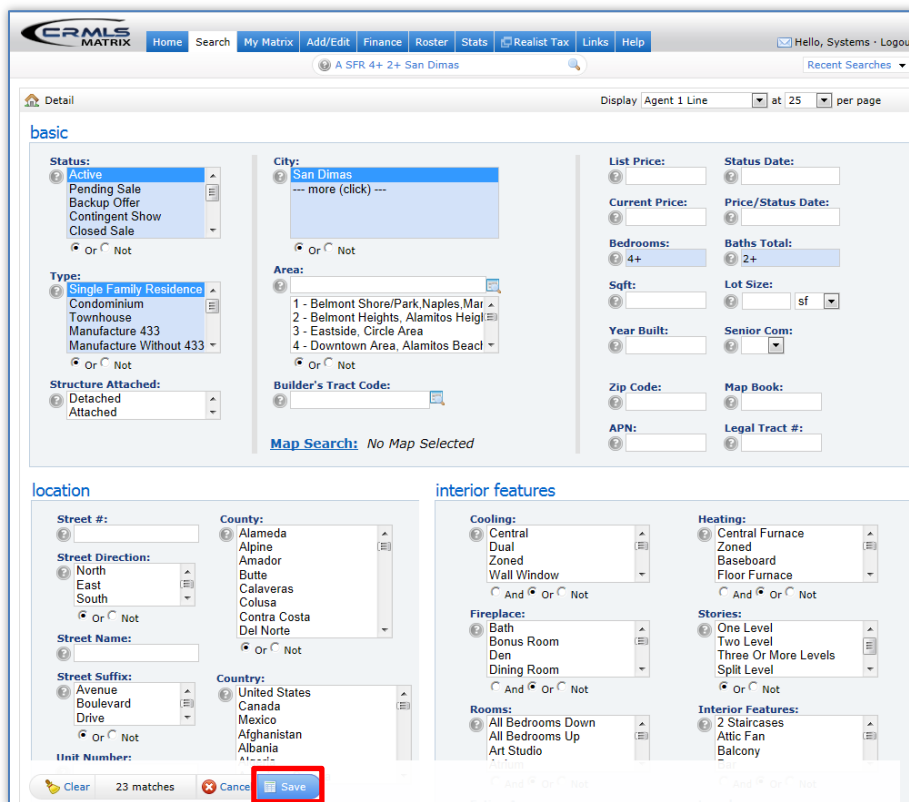


Note: If you have a large number of Saved Searches, you can filter them using the **Filter Saved Searches** drop-down menu.

4. Click **Criteria** to update your Saved Search criteria before turning it into an Auto Email.



5. Review and modify your search criteria as necessary, then click **Save**.



Note: Saved Searches that return more than 250 listings cannot be turned into an auto Email.

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



CRMLS MATRIX Home Search My Matrix Add/Edit Finance Roster Stats Realist Tax Links Help

[Turn this Saved Search into an Auto Email](#)

Settings for 'San Dimas Homes - Smith Family'

Search Name: San Dimas Homes - Smith Family

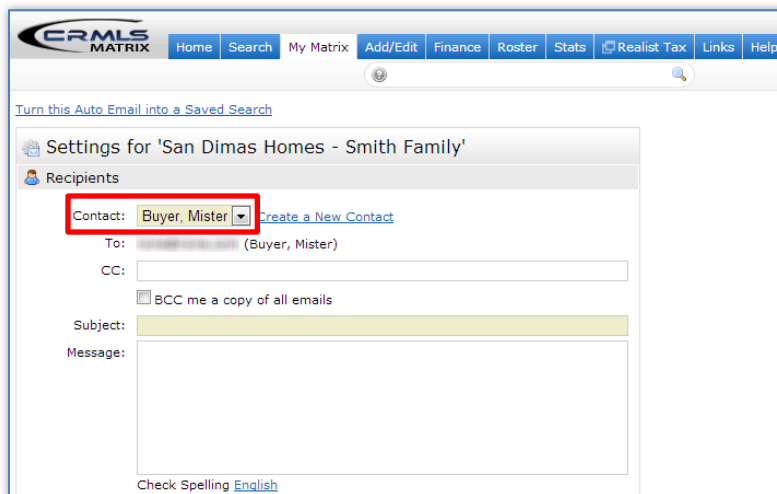
Contact: Buyer, Mister [Create a New Contact](#)

Enable as Favorite Search on Home tab (12 maximum)

Criteria:

Status is 'Active'
 City is 'San Dimas'
 Type is 'Single Family Residence'
 Bedrooms is 4+
 Baths Total is 2+

- Verify that the correct client is selected in the **Contact** drop-down list.



CRMLS MATRIX Home Search My Matrix Add/Edit Finance Roster Stats Realist Tax Links Help

[Turn this Auto Email into a Saved Search](#)

Settings for 'San Dimas Homes - Smith Family'

Recipients

Contact: Buyer, Mister [Create a New Contact](#)

To: (Buyer, Mister)

CC:

BCC me a copy of all emails

Subject:

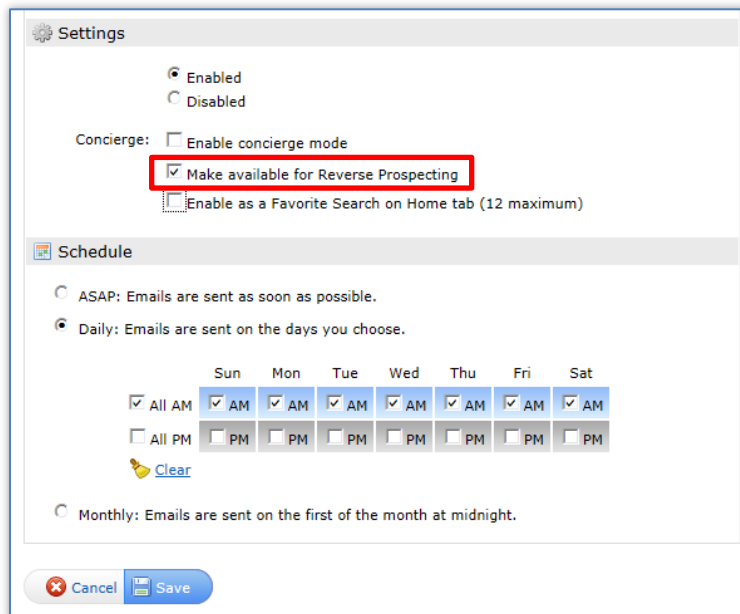
Message:

Check Spelling [English](#)

- If you want to send the auto email to an additional email address associated with the selected contact, enter the address in the **CC:** field.
- Select **BCC me a copy of all emails** to receive a blind carbon copy of auto emails sent to the client.
- Enter a subject for the email in the **Subject** field.
- The CRMLS Matrix platform 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 agents to see if their listing was sent in an auto email.



Settings

Enabled
 Disabled

Concierge: Enable concierge mode
 Make available for Reverse Prospecting
 Enable as a Favorite Search on Home tab (12 maximum)

Schedule

ASAP: Emails are sent as soon as possible.
 Daily: Emails are sent on the days you choose.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

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

Note: Client information is never shared with listing agents when Reverse Prospecting is enabled.

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

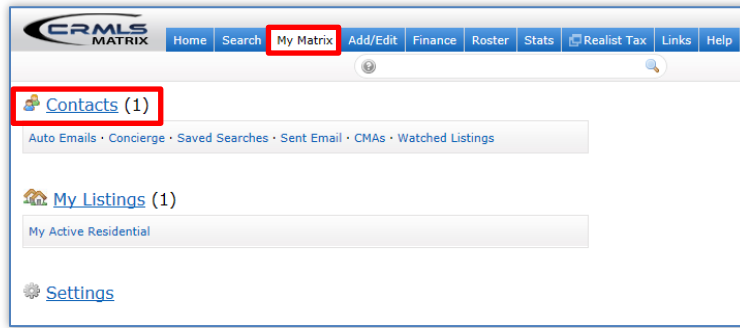
14. Click the **Save** button to save and enable your Auto Email.

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.

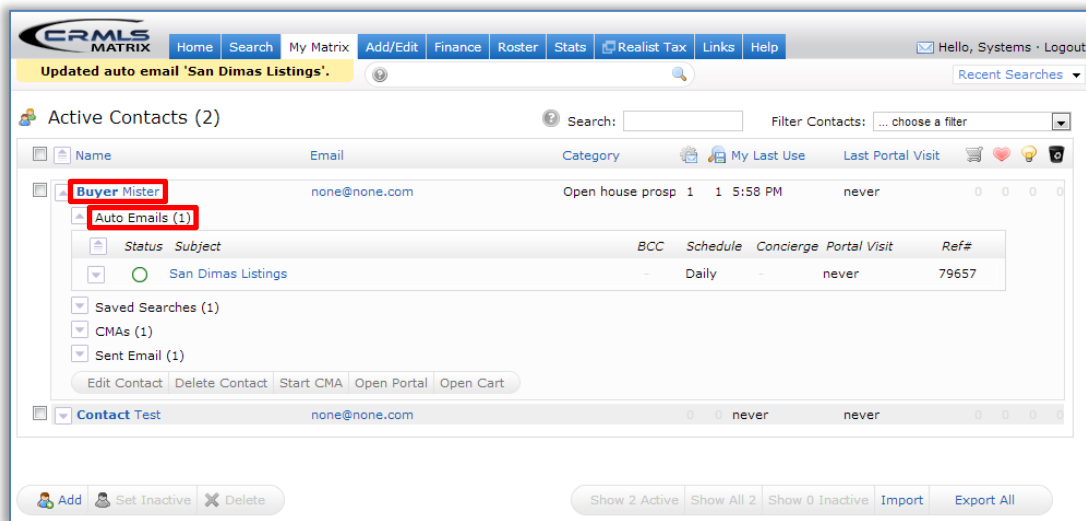
MANAGING AUTO EMAILS

Auto Emails are created by an agent for clients who want 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.



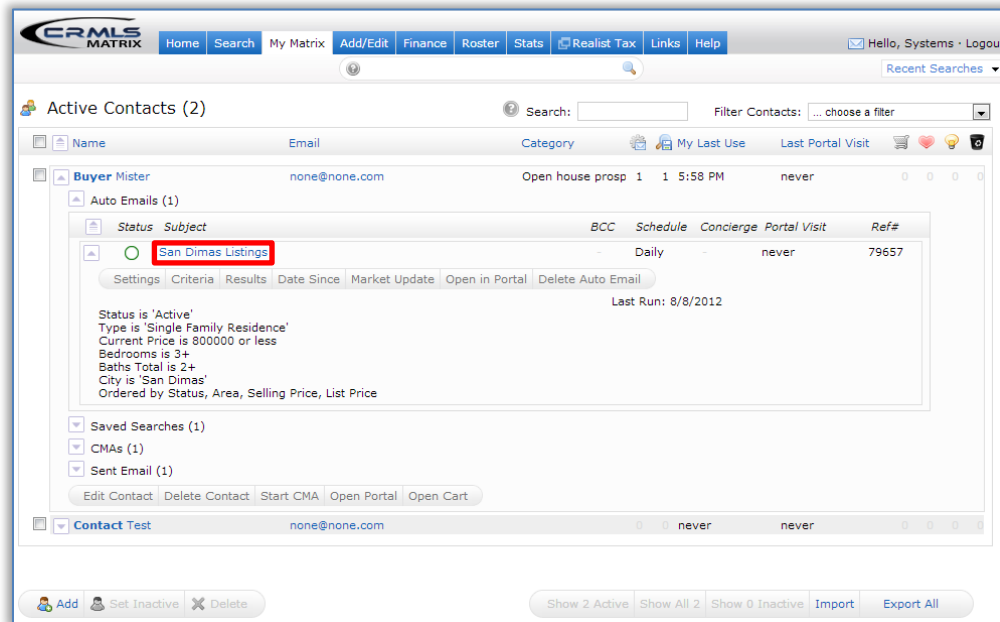
2. Click the name of the contact you want to work with to expand the menu of options.
3. Click the **Auto Emails** link to view a list of Auto Emails saved under this contact.



Note: The **Ref#** 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 name of the Auto Email you want to work with to view details and options.



Now you can do the following:

- Click the **Settings** button, then refer to “[Creating Auto Emails from Search Results](#)” on page [37](#) for information on selecting the auto email setting.
- Click the **Criteria** button to update the search criteria for your Auto email. Be sure to click the **Save** button when you are done updating your search criteria.
- Click the **Results** button to view all listings that match your search criteria.
- Click the **Date Since** button to view new listings since the last time the search was generated.
- Click the **Market Update** button to view new listings since the time the search was generated. You can also specify a date range or specific date to generate your search results.
- Click the **Open in Portal** button to view your client’s favorite listings, possibilities, and discarded listings. See “[Viewing Your Client’s Auto Email Portal](#)” on page [58](#) for more details.
- Click the **Delete Auto Email** button to permanently delete the Auto Email.

AUTO EMAIL CONCIERGE

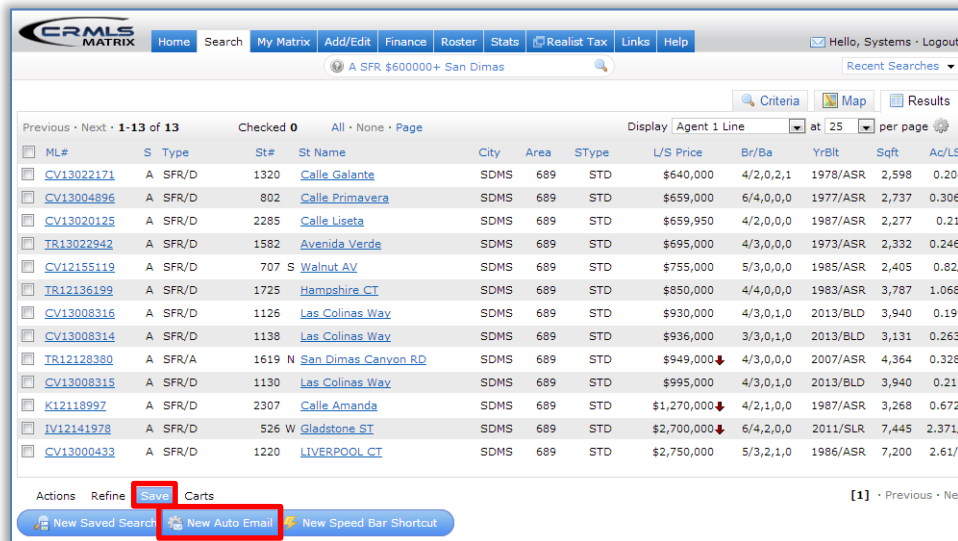
The Auto Email Concierge gives you complete control over listings sent to your clients when using the Auto Email feature. When matching listings are found by your client’s Auto Email, they will appear in the Concierge. The Concierge will allow you to approve and reject listings, and only listings that 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”](#) on page 46
- [“Managing Listings in Concierge Mode”](#) on page 49
- [“Enabling Concierge Mode for Existing Auto Emails”](#) on page 51
- [“Disabling Concierge Mode for an Auto Email”](#) on page 53
- [“Auto Email Displays for Concierge Mode”](#) on page 55

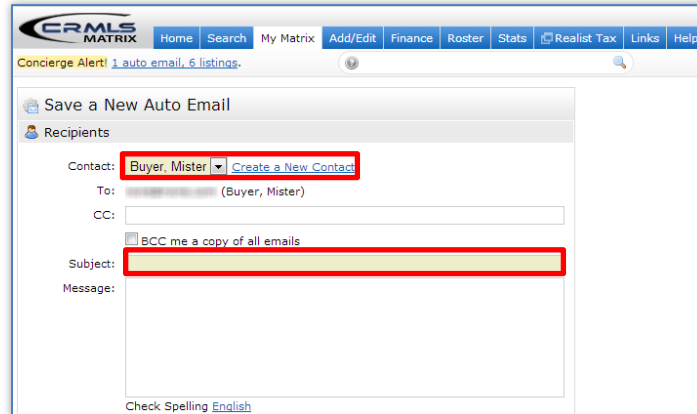
CREATING A CONCIERGE AUTO EMAIL

Before you begin, make sure that you have performed a search and are at the Search Results page.

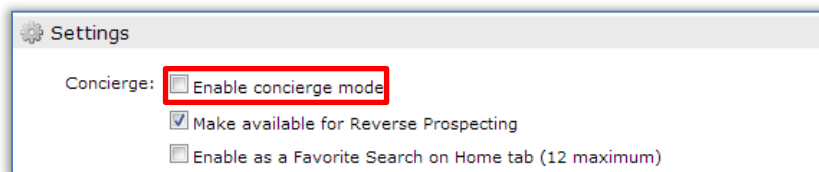
1. From the Search Results page, click the **Save** button, then select **New Auto Email**.



2. On the **Save a New Auto Email** page, select a contact in 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.

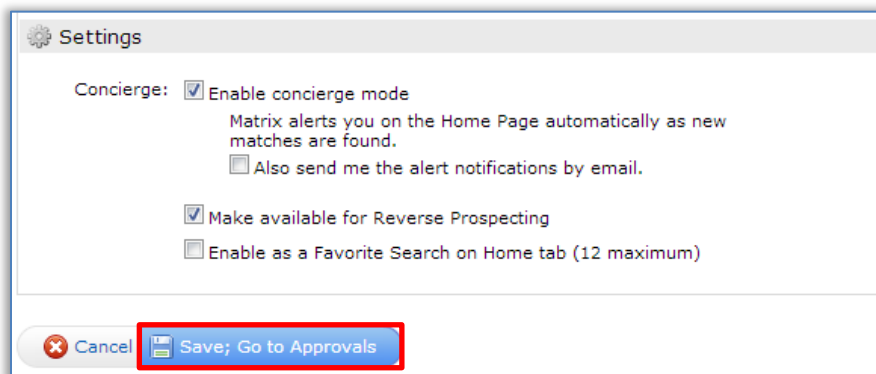


4. Click the **Enable concierge mode** checkbox under the Settings section.



Scheduling options for your Auto Email are not available when the Auto Email Concierge is enabled.

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 filter listings for your client, select one or more listings and click the **Reject** or **Approve Selected** button. Only those listings that are approved will be sent to the client.

Concierge Alert! 1 auto email, 13 listings.

Original Results > Concierge: Test Contact

Concierge Approvals Page: Test Contact (13)

These 13 listings found by 'Test' need your approval. They are not yet visible.

Previous • Next • 1-13 of 13 • Checked 4 • All • None

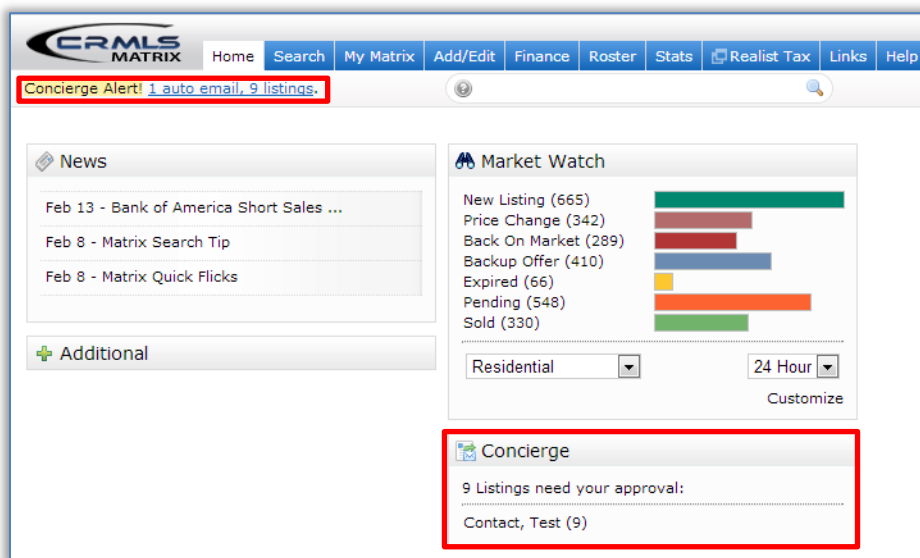
<input type="checkbox"/>	Emailed	ML#	S Type	St#	St Name	City	Area	MB#
<input checked="" type="checkbox"/>	Never	K12118997	A SFR/D	2307	Calle Amanda	SDMS	689	
<input checked="" type="checkbox"/>	Never	TR12128380	A SFR/A	1619 N	San Dimas Canyon RD	SDMS	689	
<input checked="" type="checkbox"/>	Never	TR12136199	A SFR/D	1725	Hampshire CT	SDMS	689	599H4
<input checked="" type="checkbox"/>	Never	IV12141978	A SFR/D	526 W	Gladstone ST	SDMS	689	600B1
<input type="checkbox"/>	Never	CV12155119	A SFR/D	707 S	Walnut AV	SDMS	689	
<input type="checkbox"/>	Never	CV13000433	A SFR/D	1220	LIVERPOOL CT	SDMS	689	
<input type="checkbox"/>	Never	CV13004896	A SFR/D	802	Calle Primavera	SDMS	689	
<input type="checkbox"/>	Never	CV13008314	A SFR/D	1138	Las Colinas Way	SDMS	689	
<input type="checkbox"/>	Never	CV13008315	A SFR/D	1130	Las Colinas Way	SDMS	689	
<input type="checkbox"/>	Never	CV13008316	A SFR/D	1126	Las Colinas Way	SDMS	689	
<input type="checkbox"/>	Never	CV13020125	A SFR/D	2285	Calle Liseta	SDMS	689	
<input type="checkbox"/>	Never	CV13022171	A SFR/D	1320	Calle Galante	SDMS	689	599-J5
<input type="checkbox"/>	Never	TR13022942	A SFR/D	1582	Avenida Verde	SDMS	689	599H6

Actions: Carts

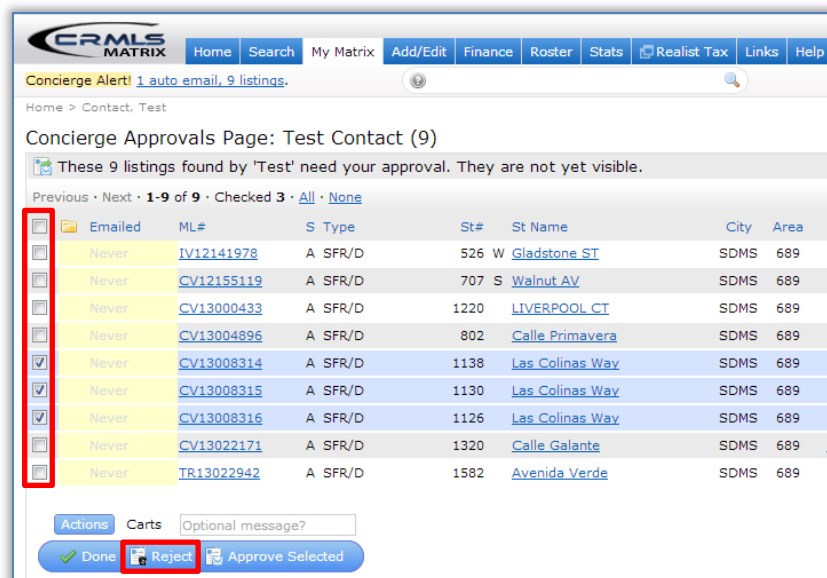
MANAGING LISTINGS IN CONCIERGE MODE

When your Auto Email finds additional listings that match your search criteria, you will see a notification in the **Concierge Widget** on the **Home** tab and at the top of most pages in the 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.

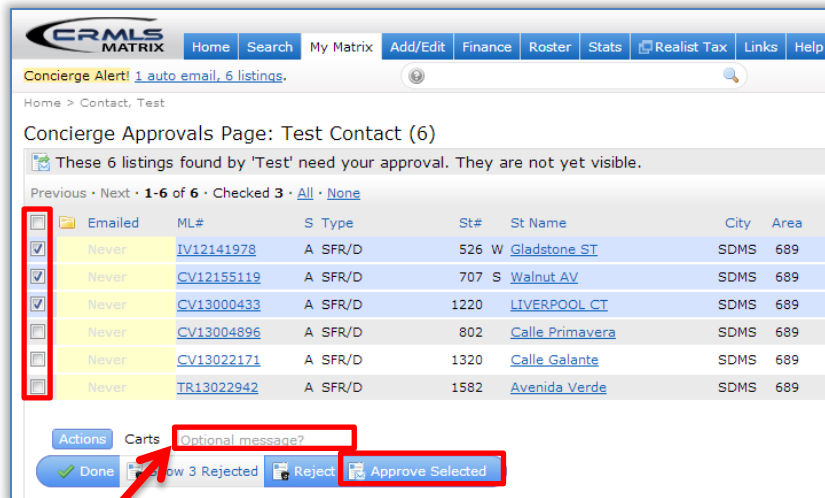
1. Click the Concierge Alert notification link in the notification bar or click on your contact's name in the **Concierge Widget** on the **Home** tab.



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



- Click the checkbox next to each listing you want to approve, then click the **Approve Selected** button.

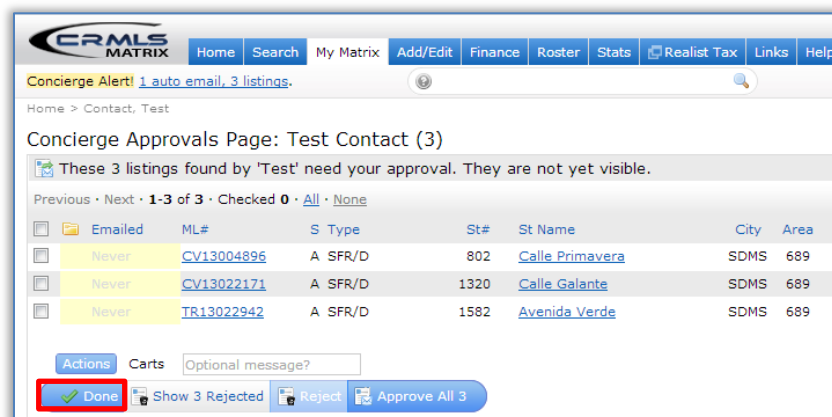


- Once your client views and activates the initial Auto Email, you can enter a message in the **Optional message** field to provide your client with additional information about the listings you are sending.

Note: When 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 and click the checkbox next to each listing you want to approve, then click the **Approve** button.

If you are 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 Matrix platform and in the Concierge Widget on the **Home** screen.

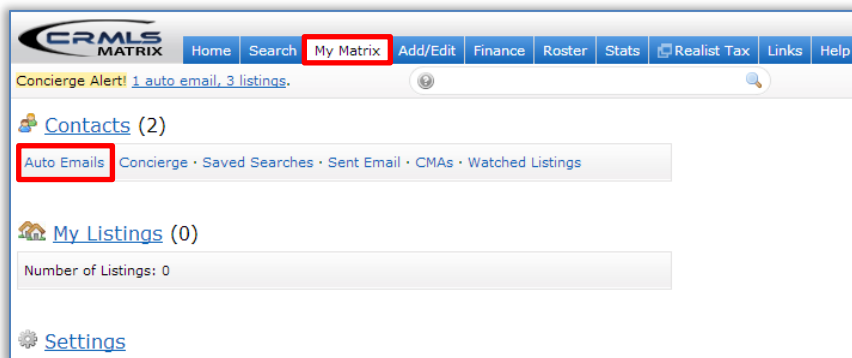
- When you are done approving and rejecting listings, click the **Done** button. The approved listings are sent to your client's portal.



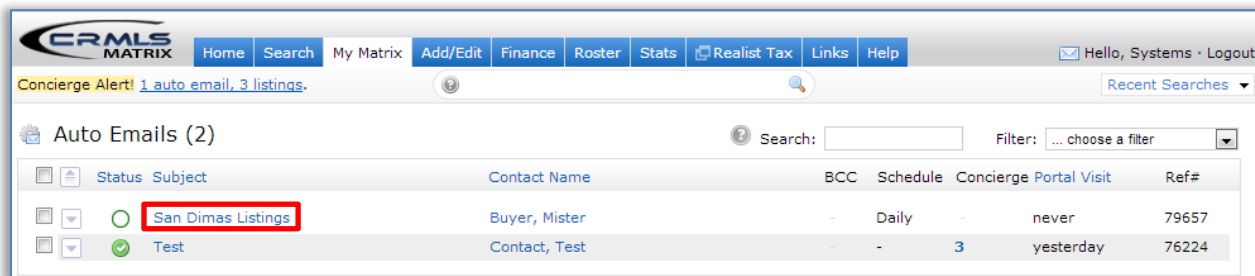
ENABLING CONCIERGE MODE FOR EXISTING AUTO EMAILS

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

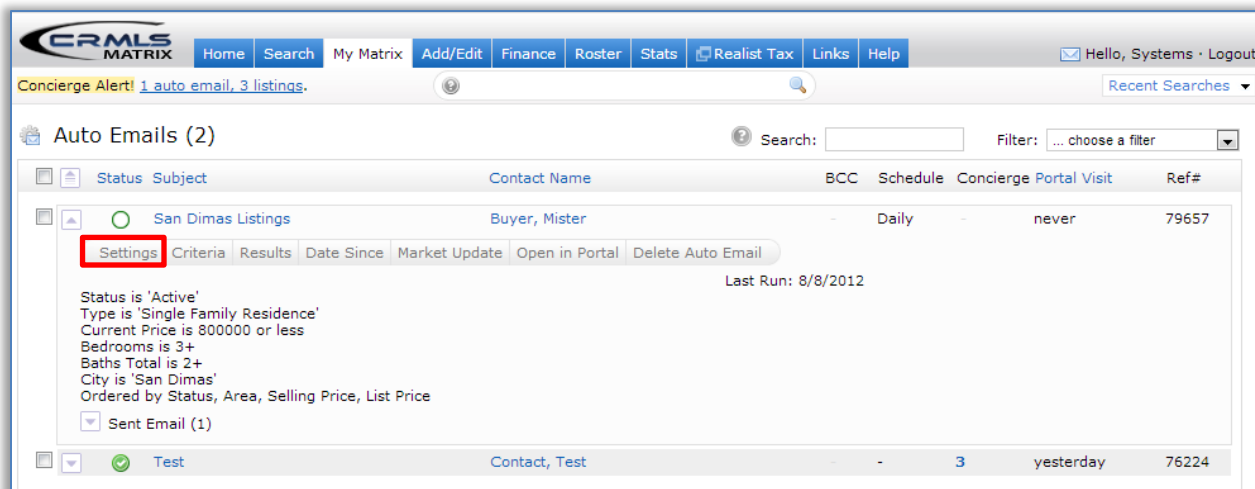
1. Click **Auto Emails** from in the **My Matrix** tab.



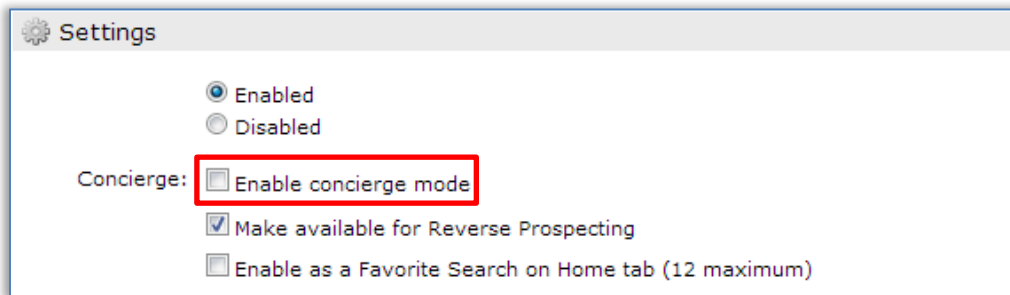
2. Click the name of the auto email you want modify.



3. Click the **Settings** button.



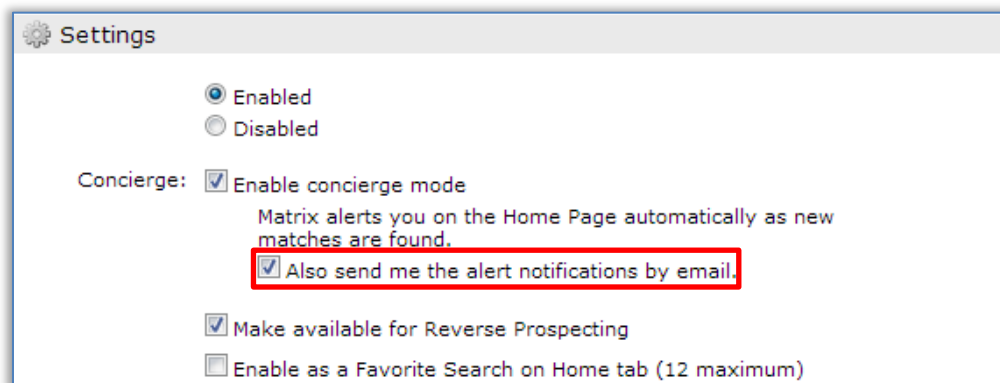
4. Click the **Enable concierge mode** checkbox under Settings.



The screenshot shows a 'Settings' dialog box with a gear icon in the top left. It contains two radio buttons: 'Enabled' (selected) and 'Disabled'. Below these is the 'Concierge:' section with a red box around the 'Enable concierge mode' checkbox, which is currently unchecked. Other options include 'Make available for Reverse Prospecting' (checked) and 'Enable as a Favorite Search on Home tab (12 maximum)' (unchecked).

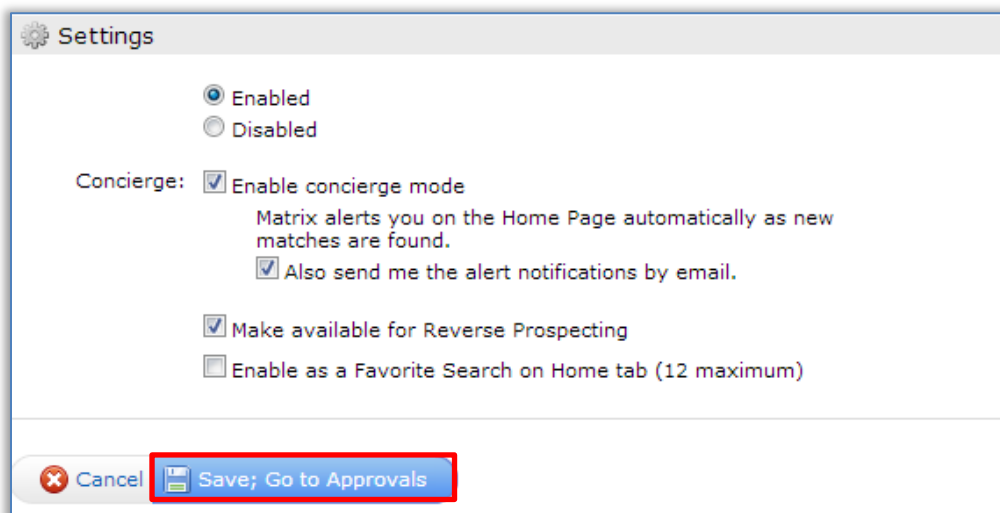
Scheduling options for your auto email are not available when the Auto Email Concierge is enabled.

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



The screenshot shows the 'Settings' dialog box with 'Enabled' selected. The 'Concierge:' section now has 'Enable concierge mode' checked. Below this, a text box reads 'Matrix alerts you on the Home Page automatically as new matches are found.' A red box highlights the 'Also send me the alert notifications by email.' checkbox, which is now checked. Other options remain the same.

6. Click the **Save; Go to Approvals** button to save and activate Concierge mode for your Auto Email.



The screenshot shows the 'Settings' dialog box with 'Enabled' selected and 'Enable concierge mode' checked. The 'Also send me the alert notifications by email.' checkbox is checked. At the bottom, there are two buttons: 'Cancel' and 'Save; Go to Approvals', with the latter button highlighted by a red box.

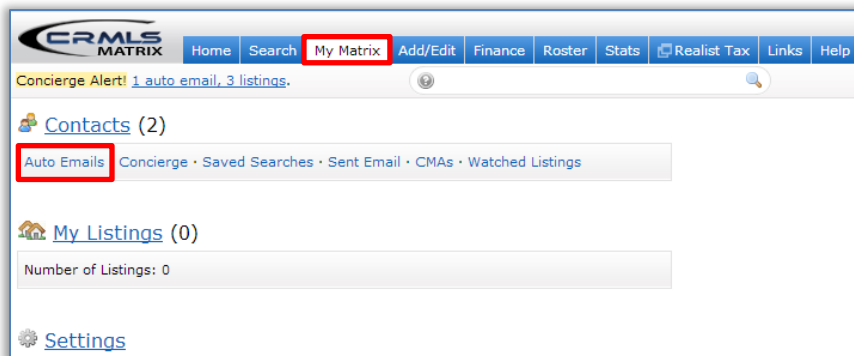
Next, you will see the **Concierge Approvals** Page where you can [approve or reject listings](#). See page [49](#) for information on approving and rejecting listings in Concierge mode.

DISABLING CONCIERGE MODE FOR AN AUTO EMAIL

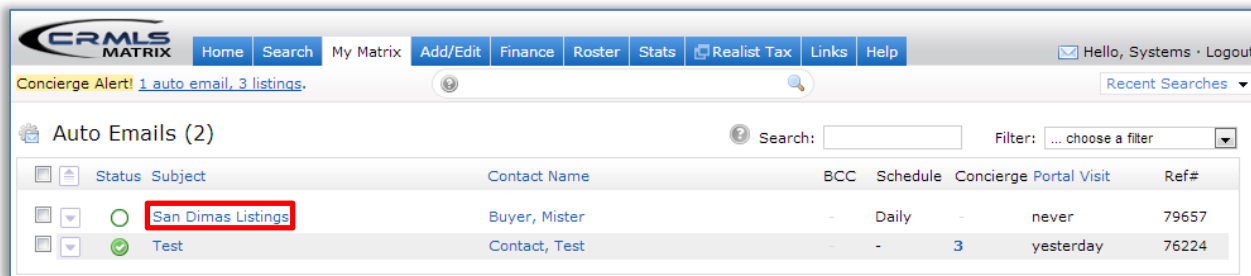
Follow the steps below to disable Concierge mode for an Auto Email.

Note: Any listings waiting for approval on the Concierge Approvals Page and listings that you have previously rejected will automatically be sent to your client when Concierge mode is disabled.

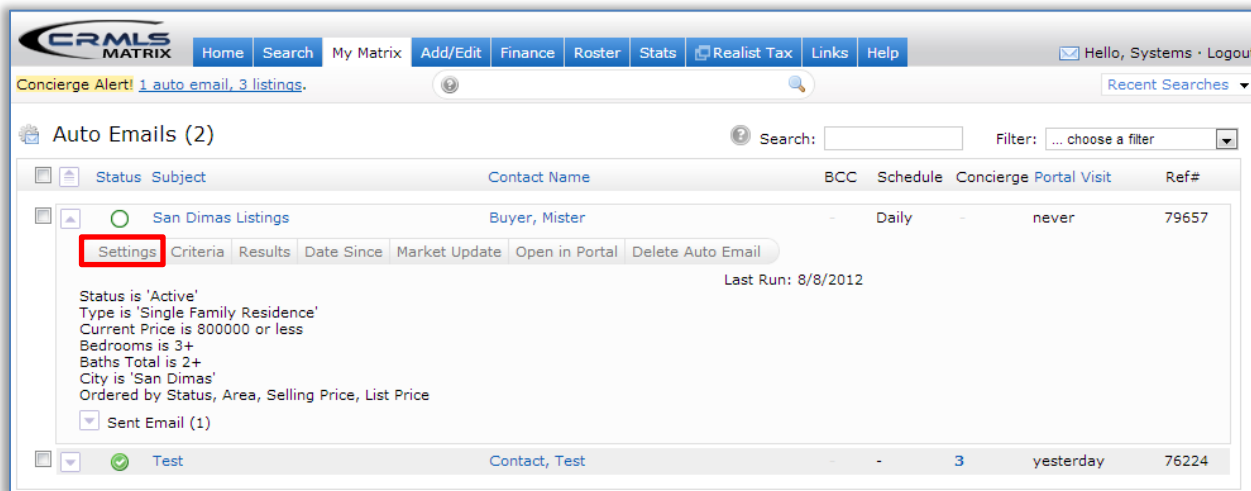
1. Click **Auto Emails** from in the **My Matrix** tab.



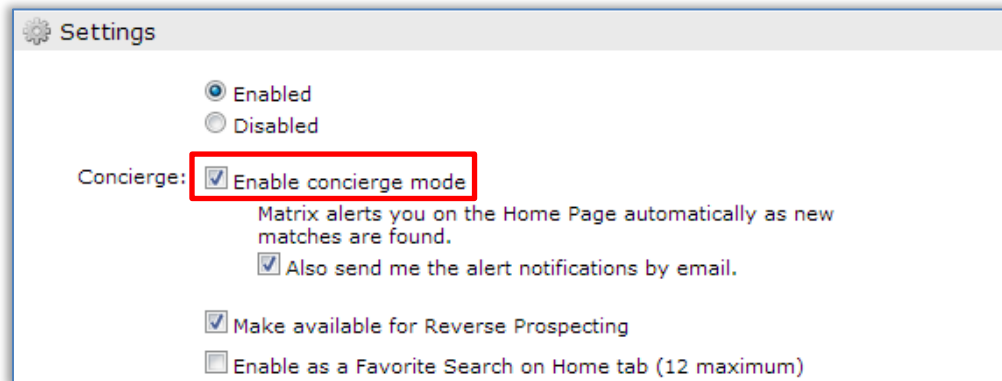
2. Click the name of the Auto Email you want to modify.



3. Click the **Settings** button.

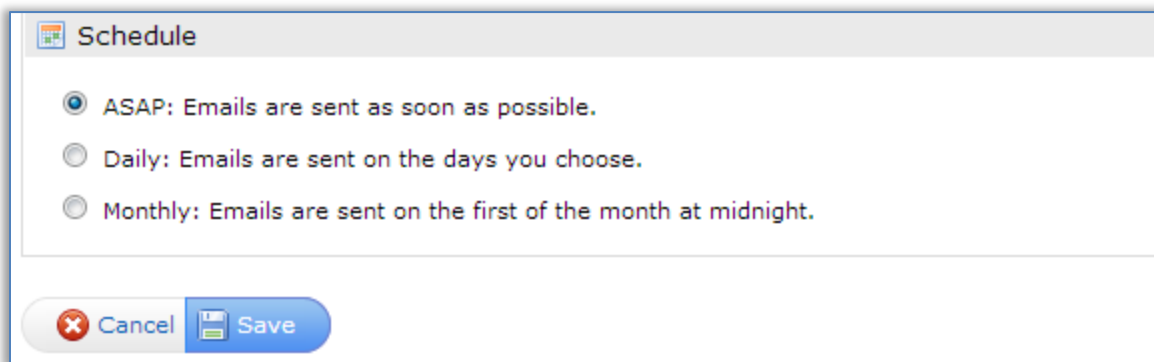


- Uncheck the **Enable concierge mode** checkbox.



The screenshot shows a 'Settings' dialog box with a gear icon in the top left. It contains several options: 'Enabled' (selected with a radio button), 'Disabled' (unselected), 'Concierge: Enable concierge mode' (highlighted with a red box), 'Matrix alerts you on the Home Page automatically as new matches are found.' (with a sub-option ' Also send me the alert notifications by email.'), 'Make available for Reverse Prospecting' (selected with a checkmark), and 'Enable as a Favorite Search on Home tab (12 maximum)' (unselected).

- When you see the confirmation message, click **OK** to disable Concierge Mode.
- Select a Schedule option for your Auto Email.



The screenshot shows a 'Schedule' dialog box with a calendar icon in the top left. It contains three radio button options: 'ASAP: Emails are sent as soon as possible.' (selected), 'Daily: Emails are sent on the days you choose.' (unselected), and 'Monthly: Emails are sent on the first of the month at midnight.' (unselected). At the bottom, there are 'Cancel' and 'Save' buttons.

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

AUTO EMAIL DISPLAYS FOR CONCIERGE MODE

The Auto Email display on the **My Matrix** tab contains helpful information about your Contacts' auto emails.

Click the unsent results in the **Concierge** column to immediately jump to the corresponding Concierge Approvals Page. The number displayed represents the total number of listings available for selection to send to your Contact.

Status	Subject	Contact Name	BCC	Schedule	Concierge	Portal Visit	Ref#
<input type="checkbox"/>	San Dimas Listings	Buyer, Mister	-	Monthly	-	never	79657
<input checked="" type="checkbox"/>	Test	Contact, Test	-	-	7	2/19/2013	76224

Note: The **Concierge** column displays a dash for all Auto Emails with Concierge Mode disabled.

To view listings waiting for approval, rejected listings, and sent listings, click the **unsent**, **rejected**, and **sent** links.

Status	Subject	Contact Name	BCC	Schedule	Concierge	Portal Visit	Ref#
<input type="checkbox"/>	San Dimas Listings	Buyer, Mister	-	Monthly	-	never	79657
<input checked="" type="checkbox"/>	Test	Contact, Test	-	-	7	2/19/2013	76224

Settings | Criteria | Results | Date Since | Market Update | Open in Portal | Delete Auto Email

Status is 'Active'
 Type is 'Single Family Residence'
 City is 'San Dimas'
 Current Price is 600000+
 Ordered by Status, Area, Selling Price, List Price

Sent Email (2)

Last Run: 2/15/2013

7 unsent
3 rejected
4 sent

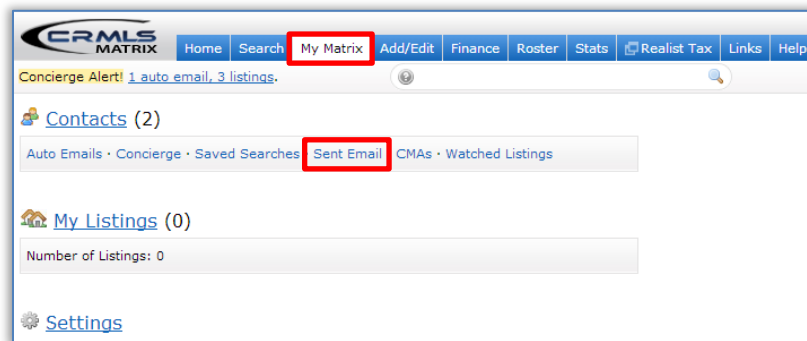
VIEWING SENT EMAIL HISTORY

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.

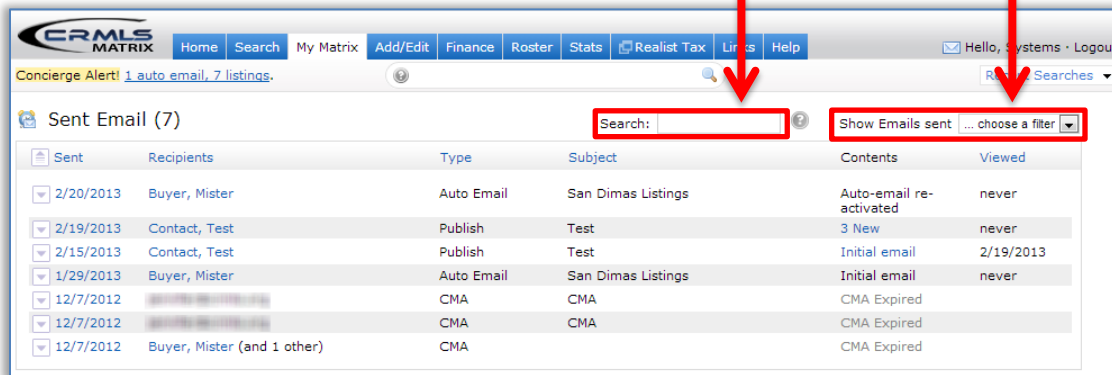
- [“Viewing Email History”](#) on page 56
- [“Viewing Your Client’s Auto Email Portal”](#) on page 58

VIEWING EMAIL HISTORY

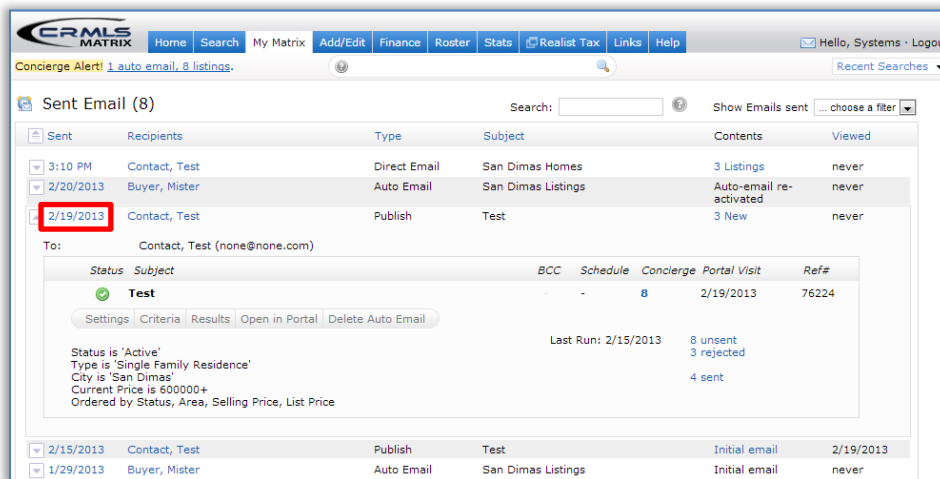
1. From the **My Matrix** tab click the **Sent Email** link.



2. In the Sent Email view, you can search for a recipient by name, or apply a filter to view a list of emails that have been sent to your clients.



3. Click the Sent date 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 a client viewed the email sent by Matrix.
- If you sent an Auto Email to your client, a status of Waiting Activation may be listed. This means that your client has not opened and activated your Auto Email. After your client clicks on the view listings link in their Email, the system will continue will continue sending listings.

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 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 Statistics Chart page.

VIEWING YOUR CLIENT'S AUTO EMAIL PORTAL

The interactive Client Portal allows your clients to view listings on a Map, mark listings as Favorites, Possibilities, or Discard properties, and print listing information. When you send listings to your client using the direct email or auto email feature in the CRMLS Matrix platform, a Client Portal will automatically be created for your client. The CRMLS Matrix platform also sends an email to your client with a link to view listings in their Client Portal.

Systems Trainer
CRMLS
Office: 909-859-2040
Fax: 909-859-2050
none@crmls.org
DRE License: 123456789

Start | Auto Email | Favorites | Possibilities | Discarded | Help

You are viewing this portal in a BCC mode.
Auto Email: San Dimas Listings.

Active Matches · Displaying 1-10 of 21 · Show: [No Longer Matching \(5\)](#) · [Unread Matches](#)

[1] 2 3 · Previous · Next · Bottom

Received ML#	Status	St#	Street Name	City	Area MB#	L/S Price	CDOM	Br/Ba	Sqft	Built
02/27/13 TR13031797	Active	1725	Hampshire CT	SDMS 689 599H4		\$799,000	1	4/4	3,787 (A)	1983/ASR
02/27/13 CV13031784	Active	333	Calle Moreno	SDMS 689 600B7		\$575,000	1	3/3	1,856 (A)	1992/ASR
02/26/13 TR13027942	Active	1582	Avenida Verde	SDMS 689 599H6		\$689,000 ↓	14	4/3	2,332 (A)	1973/ASR
02/21/13 CV13027953	Active	1764	Paseo Varano	SDMS 689 600A4		\$668,000	9	5/3	2,662 (A)	1977/EST
02/20/13 WS13008753	Active	1444	Calle Cecelia	SDMS 689 599J7		\$738,000	37	4/3	2,729 (A)	1985/ASR
02/20/13 IV12139264	Active	236 S	Valley Center AV	SDMS 689 599H2		\$355,500 ↓	109	3/2	1,338 (A)	1954/ASR
02/20/13 II12117820	Active	545 W	4th ST	SDMS 689 600A1		\$550,000 ↑	161	5/3	2,600 (A)	1948/ASR
02/20/13 SR13025459	Active	1158 W	Tudor ST	SDMS 689		\$399,000	12	4/3	1,890 (A)	1962/ASR
02/20/13 CV13025382	Active	874	Calle Primavera	SDMS 689		\$475,000	10	5/3	2,662 (A)	1977/ASR
02/20/13 CV13025183	Active	1761	Grasscreek DR	SDMS 689		\$550,000	250	3/2	1,840 (A)	1964/ASR

[1] 2 3 · Previous · Next · Top

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

Display: Public - 1 Line at 10 per page.

Note: Listings that have been categorized as favorites, possibilities, and discards will be saved and can be retrieved each time your client opens their Client Portal.

Follow the steps below to view listings marked as Favorites, Possibilities, and Discarded.

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

CRMLS MATRIX | Home | Search | **My Matrix** | Add/Edit | Finance | Roster | Stats | Realist Tax | Links | Help

Concierge Alert! [1 auto_email, 3 listings.](#)

Contacts (2)

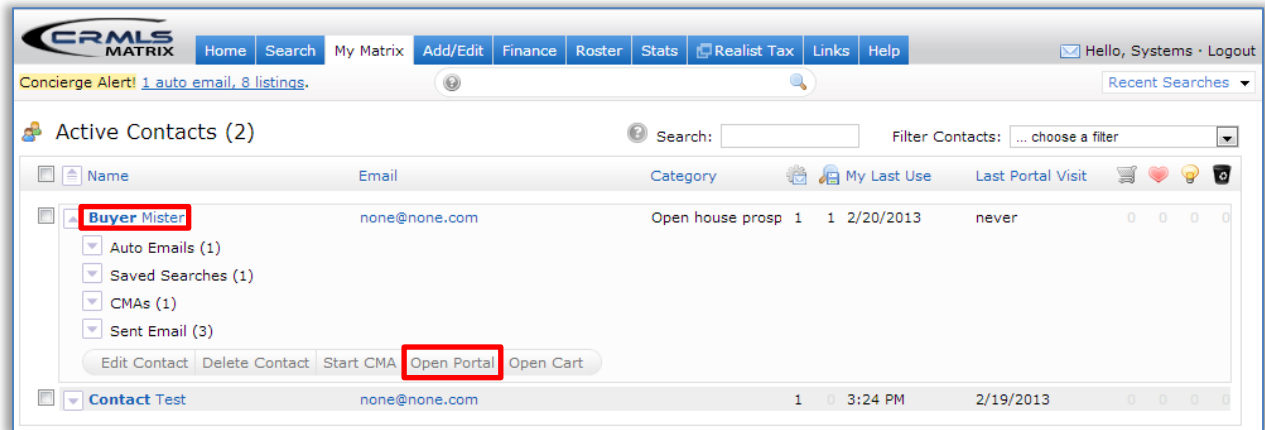
Auto Emails · Concierge · Saved Searches · Sent Email · CMAs · Watched Listings

My Listings (0)

Number of Listings: 0

Settings

2. Click the name of your client to view contact options.
3. Click the Open Portal button to view Favorites, Possibilities, and Discarded listings.

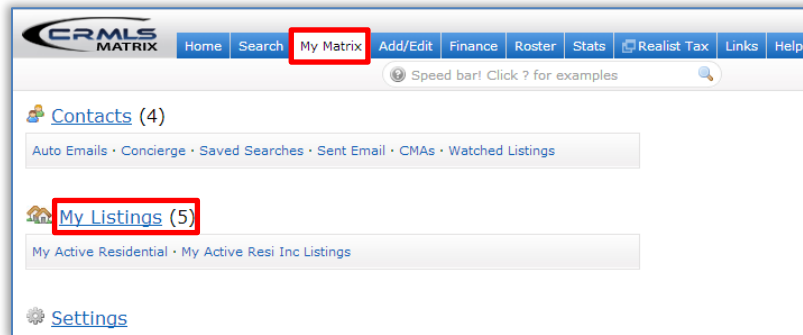


Note: From the client portal, you can mark listings to the Favorites, Possibilities, and Discarded listings folders for your client.

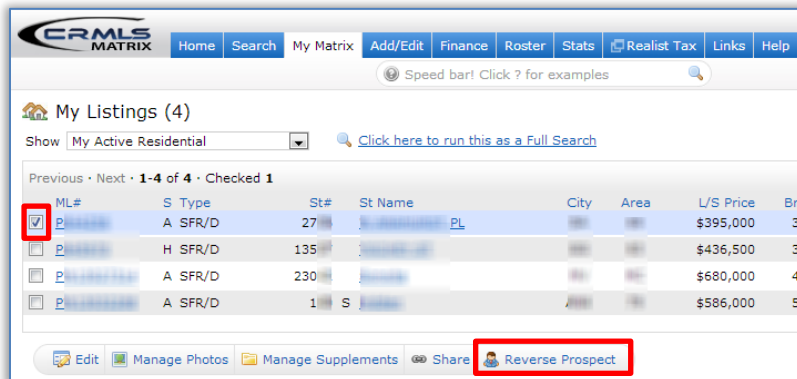
REVERSE PROSPECTING

Reverse Prospecting provides listing agents with statistics on how many times their listing was emailed to a client by another agent. Follow the steps below to get started.

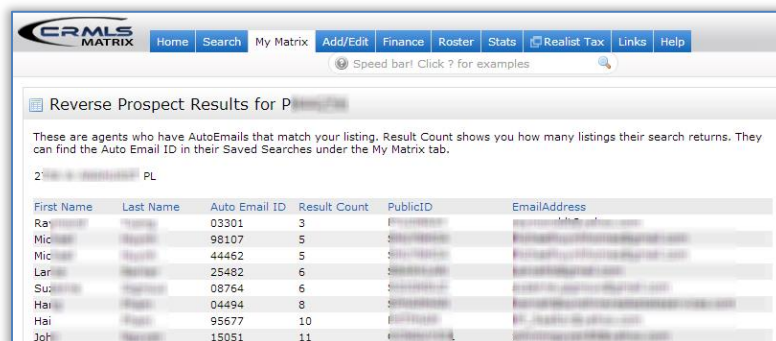
1. From the **My Matrix** tab click the **My Listings** link.



2. Click the checkbox next to a listing that you would like to view email statistics for, then click the **Reverse Prospect** button.



3. The Reverse Prospect Results screen displays the Auto Email ID, Auto Email Results Count, the first name, last name, Public ID, and Email address of the agents who sent their client an auto email that contained your listing.



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 few listings that matched their client's search criteria).

CARTS

The CRMLS Matrix platform allows you to add listings from a search results screen to a Cart for quick access. Listings that you add to a Cart will remain in the cart regardless of any changes/modifications the listings go through. You can then view your client's Carts and quickly print listing reports or email the listings to your clients.

- [“Adding Listings to a Cart”](#) on page [61](#)
- [“Accessing Carts”](#) on page [62](#)
- [“Removing Listings from A Cart”](#) on page [64](#)

ADDING LISTINGS TO A CART

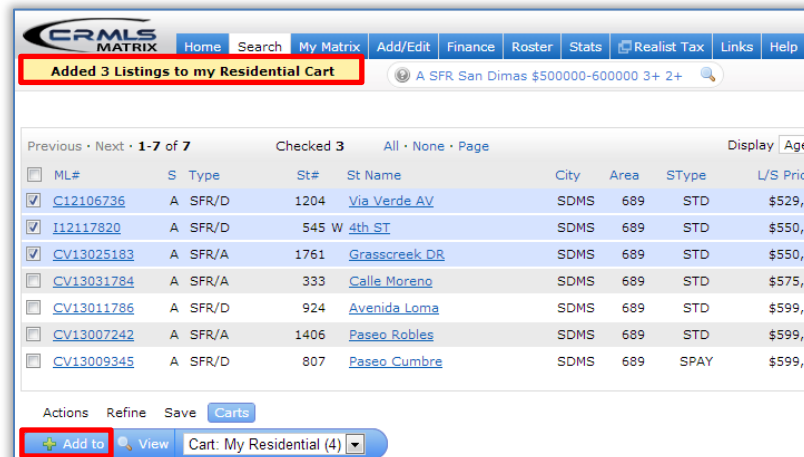
Before you begin, make sure that you have performed a search and are at the search results page.

1. Click the checkbox next to each listing you want to add to a Cart.
2. Click the **Carts** button, then select a client in the drop-down list.



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

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



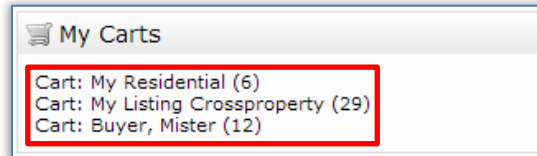
Note: When the listings have been added to the Cart, you see a confirmation message at the top of the screen.

ACCESSING CARTS

The CRMLS Matrix platform provides you with multiple ways to access your Carts. Refer to the following sections to access your Carts.

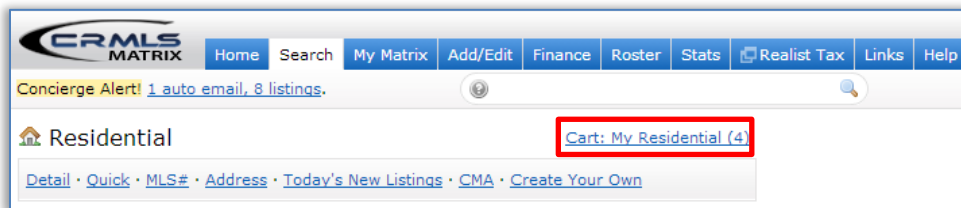
ACCESSING A CART FROM THE HOME TAB

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



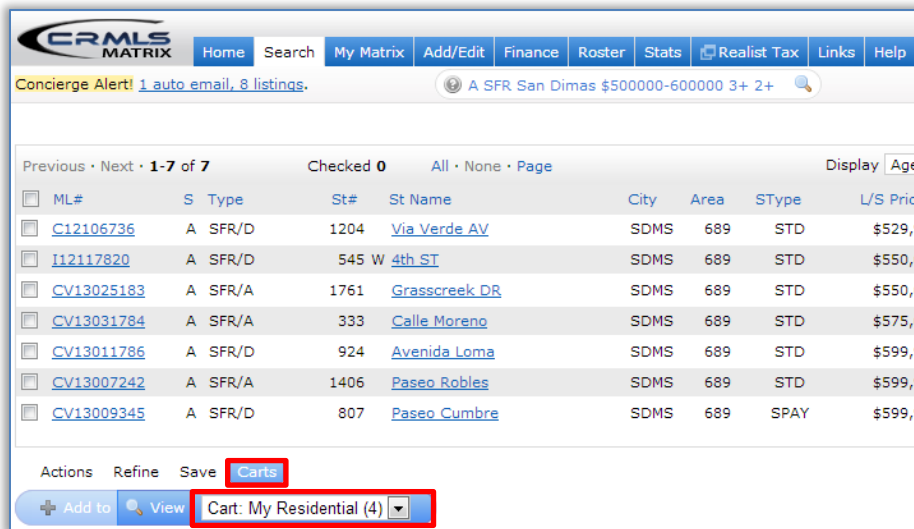
ACCESSING A CART FROM THE SEARCH TAB

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



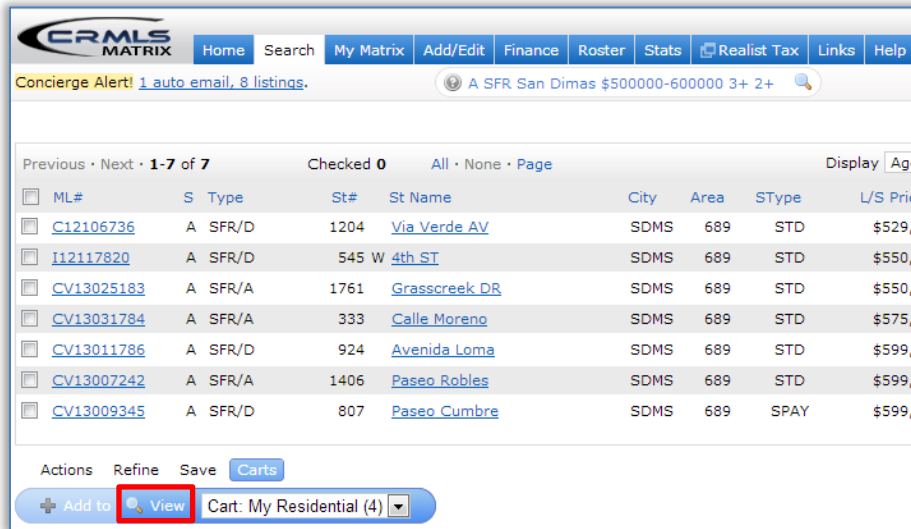
ACCESSING A CART FROM THE SEARCH RESULTS PAGE

1. From the search results page, click the **Carts** button.
2. Select the Cart you want to view from the drop-down menu.



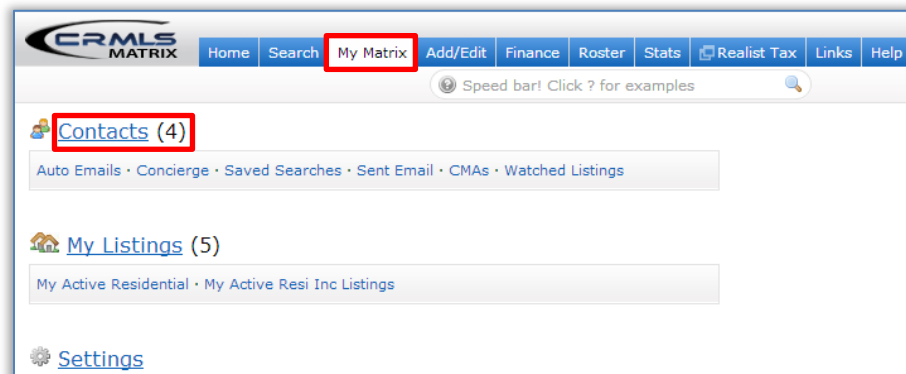
Note: If you have a large number of clients, you may need to select -- more (click) -- to display additional clients.

3. Click the **View** button to open the selected cart.

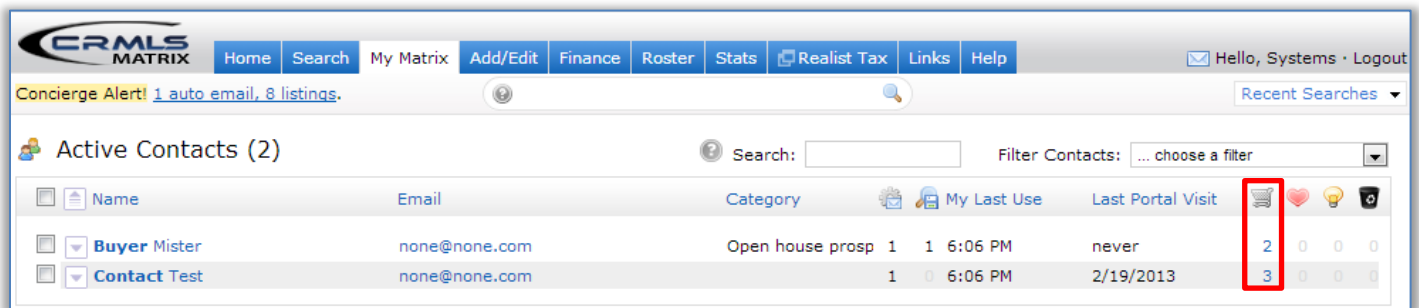


ACCESSING A CART FROM THE CONTACTS PAGE

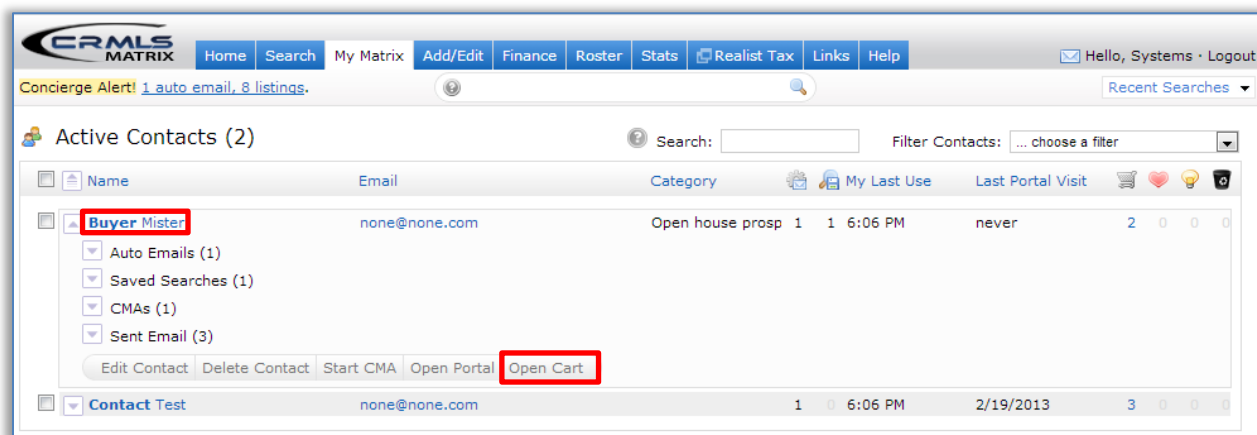
1. Click the **My Matrix** tab, then click **Contacts**.



2. Click the number link in your contact's Cart column.



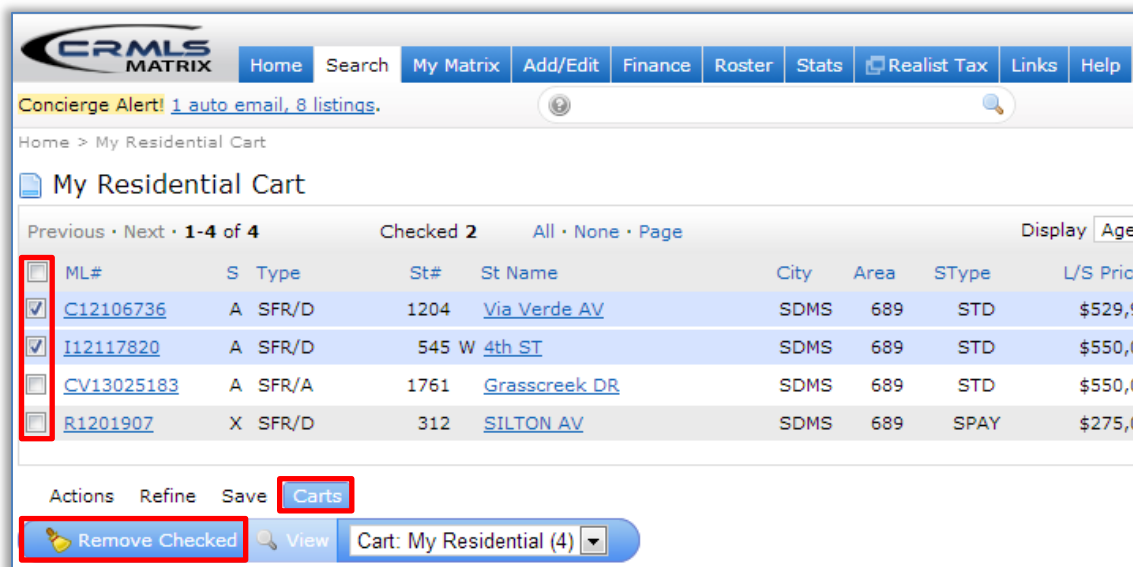
You can also access your client's Cart by clicking your contact's name and clicking the **Open Cart** button.



REMOVING LISTINGS FROM A CART

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 62
2. Click the checkbox next to each listing you want to remove from the Cart.
3. Click the **Carts** button to view Cart options.
4. Click the **Remove Checked** button to remove the selected listings.



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

California Regional MLS takes pride in providing the highest quality technical support and training for all CRMLS products and services. Please refer to the following sections for information on all of the support resources that CRMLS has to offer.

- [“CRMLS Website”](#) on page [65](#)
- [“Training Resources”](#) on page [65](#)
- [“Customer Care”](#) on page [66](#)

CRMLS WEBSITE

The CRMLS website located at <http://www.crmls.org> contains the following tools and resources.

- [Rules and Policies](#)
 - [Carets Standardized Rules and Regulations](#)
 - [California Model Rules about Service Type](#)
 - [CARETS Data Integrity Standards](#)
- [Association Contacts](#)
- [Public Property Search](#)
- [Reciprocal User Information for CRMLS members and non-members](#)



TRAINING RESOURCES

CRMLS takes pride in providing quality training materials and training resources to fit your schedule and individual learning style. Training resources can be found by visiting <http://www.crmls.org> and clicking on the **TRAINING** button.



CRMLS offers the following types of training:

- **Instructor Led Classroom Training:** Classroom style training classes held at your local association/board of Realtors®. Check the training calendar for a list of available classes.
- **Hands on Training:** Classroom style training classes held at the CRMLS office in San Dimas. Seating is limited, so be sure to sign up early.
- **Webinar Training (Web Conference):** Online training classes that can be taken from the comfort of your home or office (requires high speed internet access).
- **Online Videos:** Learn at your own pace with our on demand video tutorials.
- **Product Documentation:** Download PDF copies of product manuals and training materials (requires Adobe reader 7.0 or later).


CRMLS Takes pride in providing the highest quality technical support for all CRMLS products and services.

If you need immediate assistance, our Customer Care technicians are available to answer your questions Monday through Friday from 8:30 a.m. to 9:00 p.m. and on Saturday and Sunday from 10:00 a.m. to 3:00 p.m.

Toll Free Number: **(800) 925-1525**

On the web: <http://www.crmls.org/support>

You can also contact CRMLS Customer Care online by submitting a support request at <http://www.crmls.org/support>.



CRMLS
CALIFORNIA REGIONAL MULTIPLE LISTING SERVICE, INC.

TECHNOLOGY ^{CL}
searching...

[Click Here for a List of CRMLS Member Associations](#)

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[PUBLIC PROPERTY SEARCH](#)
[RECIPROCAL USER INFO:](#)

SUPPORT

CRMLS Members
Submit Support Request or Suggestions

Support Hours
 Monday through Friday: 8:30 a.m. to 9:00 p.m.
 Saturday and Sunday: 10:00 a.m. to 3:00 p.m.

Phone Number: 800-925-1525 or 909-859-2040

Note:
 If you need assistance with account changes or billing, please contact your Association/Board of REALTORS®.
[Click Here for a list of Association/Board contacts.](#)

DOWNLOAD CENTER

- [Training Manuals](#)
- [Training Videos](#)
- [Multiple Listing Input Forms](#)
- [Image Resizer](#)
- [Link Generator](#)
- [Smart Trac Participant / Vendor Enrollment](#)
- [Fannie Mae Market Condition Addendum](#)
- [DataMaster](#)
- [Builder Tract Reference Tool](#)
- [CRMLS Mobile](#)

- [“Searching for Listings on Your Mobile Devices”](#) on page [68](#)
- [“Adding a Public Search Link to Your Website”](#) on page [69](#)

SEARCHING FOR LISTINGS ON YOUR MOBILE DEVICES

Follow the steps below to access the CRMLS Matrix platform from your mobile devices.

1. Open your mobile device’s web browser and navigate to <http://www.crmlsmobile.com>
2. Enter your User ID and Password in the available fields.
3. Click the **Login** button to start searching for listings.

Note: Access to CRMLS Mobile is free, however, your wireless carrier may charge extra for Internet data usage on your mobile device. Please contact your wireless carrier for Internet data rates and charges.



ADDING A PUBLIC SEARCH LINK TO YOUR WEBSITE

Follow the steps below to add a public search link to your website.

1. Open your web browser and navigate to <http://www.crmls.org>.
2. Click the **SUPPORT** button, then select **Link Generator**.



3. Enter your **Public ID** and **Office Code** in the available fields.

Note: if you don't know your Public ID or Office code, see the "Searching for Agents and Offices" section of this manual.

4. Select a language(s) from the list of available languages.
5. Click the **Get Links** button.



- Copy and paste the link text into an email and send it to your website developer for integration into your website.

Note: There are three available links for your website; a General Public Search, an Agent Listings Link, and an Office Listings link.

