

Strategic Searching and Matrix Map Course Notes

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Introduction to Strategic Searching and Matrix Map

- **Using the right property classification**
 - Ask clarifying questions to determine what is important to your buyer about type of property they are interested in. Are you working with an investor interested in vacant land? Are you working with renters not ready to buy?
 - Separate their “wants” from their “needs.”
 - Be prepared to provide *resources* for financial or mortgage concerns, insurance, taxes, or any other information regarding the purchase.
 - Sometimes, a buyer lead may have extensive criteria, and clarifying questions need to be asked. It is also not uncommon for search criteria to be clarified and refined along the way. Some typical points that may need clarification:
 - **Property Style** – For example, if the buyer says they want a condo, does that include Townhouse or Villa Style?
 - **Price Range** – Is there a maximum price? Range of prices? Has the buyer been pre-qualified to determine this range?
 - **Bedrooms/Bathrooms** - If the buyer says they want a 3-bedroom home, do they mean precisely 3 bedrooms or at least 3 bedrooms? Do they need 3 bedrooms, or are they planning on using one room as an office/den? There is a difference in how we would set up the search.
 - **Garage** - Does the buyer need a 2-car garage or at least a 2-car garage? In many areas, a 3-car garage might be the norm.
 - **Location** - Where do they want to live? What type of community? Do they want to be in a subdivision? Do they want a community with an HOA and/or amenities? Waterfront?

Matrix Search Forms

- Which search form to use? For vacant lots, use Vacant Land. For duplexes or other multi-family properties, use Income Property. If the residential search is what is needed, Quick or Detailed? All the property types have Quick and Detail search form options. The difference is that “Detail” will have more pre-set fields.
- Default criteria can be set (such as the county, property style, etc.) by clicking the cog icon on the top corner. 
- Keep in mind that in any search, the property will only display if the listing agent has selected that feature for the property. Results may not be complete.

Search Tips

Property Style – For any picklist like this, multiple options can be selected by holding down the Control key (Command key for Mac) and then clicking each option. Underneath these fields, there are radio buttons for “or”, “not”, and sometimes “and.” “Or” means any of the selected criteria will work, “and” means all selected criteria must work, and “not” means that selected criteria should be excluded.

Geographic Fields –



Map Search: *Map Area Selected* [Clear Map](#)
Within 3 miles of Browser Location [My Location](#)

There are fields for Address, County, MLS Zip, City, and Legal Subdivision Name. However, be careful how you mix and match these fields because each field's criteria must be true. For example, Englewood is in both Sarasota and Charlotte counties. If you only want properties in the Charlotte County side of Englewood, enter Charlotte for County AND Englewood for city. If you just want Englewood and are not concerned with the county, leave the county field blank.

Use My location and search radius to search for properties within so many miles of your location.

If you want Hillsborough County but do not want to be in Brandon, enter Hillsborough as the county, type Brandon as the city, and then put a “!” symbol in front of Brandon.

! = Exclude Example: (!Brandon)

A county or zip code can be excluded by clicking the “not” radio button. A subdivision can also be excluded by using the “!” symbol.

Next to the zip code field, there is a search icon  where you can pull all zip codes for a city.

When searching for subdivisions, it is best to put a “*” symbol on both sides of the subdivision name. This means that the subdivision “contains” that word. For example, typing in *Palmer Ranch* will pull subdivisions such as Mira Lago at Palmer Ranch, Arielle at Palmer Ranch, Stoneybrook at Palmer Ranch, etc.

Price – There are four ways to enter a price.

Exact #	Plus	Minus	Dash
Only the number entered	Greater than and equal to number entered	Less than and equal to the number entered	Range including numbers entered
200 = exactly \$200K	200+ = \$200K or more	200- = \$200K or less	200-300 = between \$200K and \$300K

Total Bedrooms/Total Bathrooms/Full Baths/Half Baths

Exact #	Plus	Minus	Dash	Zero
Only the number entered	Greater than and equal to number entered	Less than and equal to the number entered	Range including numbers entered	Not or no results
2 = exactly 2	2+ = 2 or more	2- = 2 or less	2-3 = 2 to 3	0 = *no half baths
0 = *no (use this if you are looking for a property with No half bath, perhaps when searching for comps)				

For bathrooms, there is a field for **Total Bathrooms** but also separate fields for Full and Half Bathrooms. For the Total Bathrooms field, enter the whole number of combined Full and Half Bathrooms desired. For example, 3 could mean either 2 full bathrooms and 1 half bathroom (3 total) or 3 full bathrooms and 0 half bathrooms (3 total).

Sq Ft Heated

Exact #	Plus	Minus	Dash
Only the number entered	Greater than and equal to number entered	Less than and equal to the number entered	Range including numbers entered
1700 = exactly 1700	1700+ = 1700 or more	1700- = 1700 or less	1700-1900 = range between 1700 & 1900

Year Built

Exact #	Plus	Minus	Dash
Only the number entered	Greater than and equal to number entered	Less than and equal to the number entered	Range including numbers entered
2018 = built in 2018	2013+ = built in 2013 or later	1930- = built in 1930 or before	1990-1999 = built between 1990 and 1999

New Construction – yes or no

Private Pool – This is only asking about a private pool for the exclusive use of the owner. There is also a checkbox to include properties with a Community Pool.

Total Acreage – filter down by lot size

Floor in Unit/Home – One, Two, Three, Split

Room Search Type – can search for features of specific rooms, such as homes where the Master Bedroom is on the first level or the kitchen has a cooking island.

Garage and Carport – Note that there are fields to search for properties with or without a garage, attached garage, or carport. There are also numeric fields to search for the number of garage and carport spaces. There is also a combined “Garage or Carport” field to search for properties with one or the other, and a minimum number of combined garage/carport spaces.

Adding Fields to Search Forms

On the bottom of each search form, there is an option to add additional fields. If you click “Add”, you are given a list of all available fields in Matrix and can select which fields you want added to your search form. You can then select fields from an available list (or use the search bar to search for a field by name), click the “add” button, and click “back” to return to the search form to enter your criteria.

Important Notes:

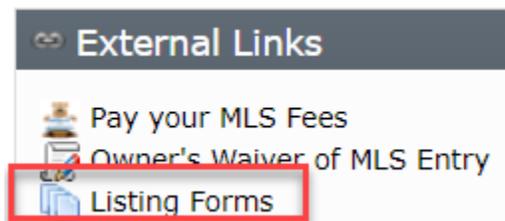
1) It is important to distinguish between a field and the criteria under the field. For example, View is a field. Under that field, you can search for criteria such as Garden, Golf Course, Pool, or Tennis Court View. However, if you were searching for a Golf Course View, you would need to know that the View field is where you would find that. See the next page in this section for information on how to determine which field to add.

2) Once the field is added to your search form, it is important to return to the form to add your criteria. Just adding the View field to your search form will not filter out properties with a Golf Course View. You would need to select Golf Course from the View field once the field is added to your form.

Sometimes, you can use your intuition to determine which field to add to search for certain criteria. For example, if you were searching for homes with a fire, you could probably guess that this criterion is under a field with “Fireplace” in its name. However, what if you were searching for a home with a fenced yard? There is no field with “fence” in the name. “Fence” is a feature under another field, and additional steps need to be taken to determine which field to add. This can be found by pulling the Listing Forms on the home page of Matrix (under the External Links section).

View				
<input type="checkbox"/> Garden	<input type="checkbox"/> Golf Course	<input type="checkbox"/> Greenbelt	<input type="checkbox"/> Park	<input type="checkbox"/> Pool
<input type="checkbox"/> Tennis Court	<input type="checkbox"/> Trees/Woods	<input type="checkbox"/> Water		

Select the Listing Form for the respective type of property for which you are searching (Residential, Commercial, Income, Vacant Land, etc.). Note that the purpose of the Listing Forms is to help agents collect data for their listings (seller's must sign this form prior to listing being entered in the MLS), but as the form has every field in Matrix and every characteristic under each field, it is an excellent resource for determining which fields to add to a search form.



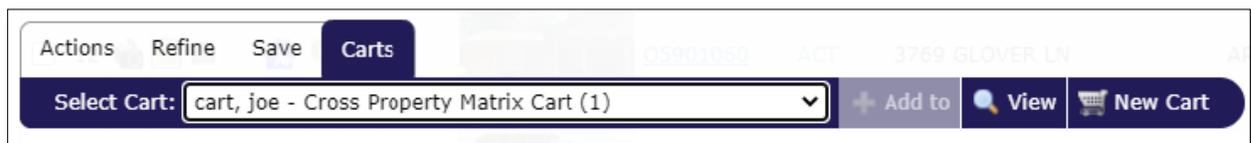
The form is a PDF document. By **clicking Control + F in Windows or Command + F in a Mac**, a "Find" bar pops up allowing you to search the document for a word or phrase. By



searching the listing form for the word "Fence", you will find out that "Fenced" is criteria under the "Exterior Features" field. If you want to search for listings with a fenced yard, add the "Exterior Features" field to your search form and then add the criteria "Fenced" under that field.

Wildcard Searches and Carts

Sample Scenario for Wildcard Search: What if you were working with a buyer looking for an investment or "flip" opportunity for a house that needs work. How would this be found in the MLS? First, there is an option for "fixer" under the Property Condition field. However, not all agents will check that off. Run this search, and then put the listings in a cart. *Carts can be accessed through the "Carts" menu underneath your search results. Each of your Matrix contacts has a cart. Choose the contact, and then click "Add to".*



Then, take out the "fixer" filter, and add in the Public Remarks field. Try searching the Public Remarks for *fixer*. When just the word is typed in, most likely, 0 matches will come up, unless the first word of Public Remarks is *fixer*. If you add in the wildcard "*" on each side of the word **fixer**, most likely some matches would come up. A comma in between means "or", where no comma means "and".



Looking for In-Law Suite			
in-law	*in law*	*in-law*, *in law*	
Looking for a Fixer Upper			
fixer	*TLC*	*handyman special*	*investor special*
needs work	*as-is*, *as is*		
Try them all by separating by a comma			
fixer, *TLC*, *handyman special*, *investor special*, *flip*, *needs work*			

**Printable Searching with Special Characters and Wildcards cheat-sheet on last page.*

Map-based Searches

Instead of using the geographic fields, you may prefer to conduct a map-based search. This gives you the flexibility to draw the exact areas on a map where you wish to conduct a search. Be careful that the criteria on your search form does not cancel out the area you draw on your map. For example, if you have Volusia County selected on your search form and then draw a map area in Seminole county, no results will show up.

On the top right corner of the map, there is a “Jump to Address” bar. In this bar, you can enter a city, zip code, or specific address/location, and the map will be centered based on the criteria entered.



There are multiple map tools on the top of the screen.

 Radius Drawing Tool – Center your map on a specific location, and then draw a search radius from that location. For example, your buyer wants to be 3 miles from their work.

 Rectangle Drawing Tool – Draw a rectangle on the map to find all listings matching your criteria within that rectangle.

 Polygon Drawing Tool– Draw a polygon, tracing specific boundaries. Click on your starting point on the map, and then click on each corner. Always end your shape at the same point where you started it.

 Freehand Polygon– This is ideal for tablets or touch screens. It allows you to trace an area on the map.

Note: When you click the red dot associated with a shape, you have the option to include or exclude that shape from your map or the intersection of two or more shapes if they overlap.

 Clear Map Shapes – Erases all of the shapes drawn on the map.

 Map Layers – Allows you to overlay a variety of different information to the map without changing your original search criteria. Using the map layer will create an additional tool to appear on the tool menu bar.



- When using the map layers, an additional tool will appear to create a shape on the map. Select map tool and then select the area you would like to create your shape.



Recenter Map – Recenters the map view and zoom level to show all properties matching your search.



- Allows you to select properties individually on the map or use the double checks to select an area on the map.



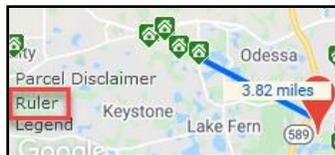
- Allows you to type in an exact location and pin that address, city, zip code on the map.



-If you want to set a particular area as default, type in the area in the jump to address and select the gear and choose to set to default.

Ruler

- to measure distance from properties to a pinned location or another property use the ruler feature found on the bottom left corner of your screen.



Multi Map Report

You may view these properties on a split screen report called the multi map. Select the properties you would like to include in the report and click on the Print tab under Actions. Select the Multi Map option and click on preview or print. The report will display where the properties are on the map along with the MLS ID, Status, Address, Beds, Full Baths, Half Baths, Year Built, SQFT, List/Sold price and Market / Sold Date.

Search run Thursday, 11:46 AM

Criteria Map Results

Previous Next · 1-5 of 5 Checked 5 All · None · Page Display Agent Single Line at 25 per page

<input checked="" type="checkbox"/>	#	ML #	Status	Address	City	Zip Code	Subdivision Name	HTD	Current Price
<input checked="" type="checkbox"/>	1	A4488031	ACT	2047 MANGO AVE	SARASOTA	34234	HOMEWOOD HEIGHTS	900	\$165,000
<input checked="" type="checkbox"/>	2	A4485169	ACT	2023 RANDA BLVD	SARASOTA	34235	KENSINGTON PARK	1,214	\$169,995
<input checked="" type="checkbox"/>	3	A4481473	ACT	4070 TALLEVAST RD	SARASOTA	34243	NONE	1,752	\$249,000
<input checked="" type="checkbox"/>	4	A4478925	ACT	2089 ARLINGTON ST	SARASOTA	34239	LA LINDA TERRACE	1,727	\$549,900
<input checked="" type="checkbox"/>	5	A4484325	ACT	4411 PROCTOR RD	SARASOTA	34233	BEE RIDGE FARMS SUB	1,812	\$550,000

Actions Refine Save Carts

Criteria Email **Print** CMA Directions Stats Export Quick CMA Cloud CMA ShowingCart Custom PDF Reports

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Print 5 Listings

Print which format(s)? To select multiple at once, hold Ctrl while you click (option key, on a Mac)

Print without header or footer

First page, last page

Every page

Print with roll-outs (if any) open

Print search criteria

Ink saver; if any, don't print images

Language: English

Back to Results Email PDF Print to PDF Preview Print

Map

Parcel Disclaimer Ruler Legend Google

MLS #	Status	Address	Bd	Eb	Hb	Yr	Blk	Soft	List/Sold	Market/Sold Dt
A4488031	ACT	2047 MANGO AVENUE	2	1	0	1925	900	\$165,000	01/09/2021	
A4485169	ACT	2023 RANDA BOULEVARD	3	2	0	1956	1,214	\$169,995	12/02/2020	
A4481473	ACT	4070 TALLEVAST ROAD	3	2	0	1987	1,752	\$249,000	10/21/2020	
A4478925	ACT	2089 ARLINGTON STREET	2	1	0	1924	1,727	\$549,900	09/23/2020	
A4484325	ACT	4411 PROCTOR ROAD	3	2	0	1969	1,812	\$550,000	11/21/2020	

Excel Spreadsheet

You may also create an Excel Spreadsheet with the results by clicking on Actions tab and then the export tab. The system will create an excel spreadsheet from the agent single line display that you may save.

Search run Thursday, 11:46 AM

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Previous Next · 1-5 of 5 Checked 5 All · None · Page Display Agent Single Line at 25 per page

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<input checked="" type="checkbox"/>	5	A4484325	ACT	4411 PROCTOR RD	SARASOTA	34233	BEE RIDGE FARMS SUB	1,812	\$550,000

Actions Refine Save Carts

Criteria Email Print CMA Directions Stats **Export** Quick CMA Cloud CMA ShowingCart Custom PDF Reports

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Searching with Special Characters and Wildcards

Symbol	Description	How to Use It
+	Greater than or equal to: Allows you to search for values that are greater than or equal to the value you entered. When using the + character, it must follow the value you enter.	<i>Bathrooms: 3+</i> Finds all listings that have 3 or more bathrooms.
-	Less than or equal to: Allows you to search for values that are less than or equal to the value you entered. When using the - character, it must follow the value you enter.	<i>Bathrooms: 4-</i> Finds all listings that have 4 bathrooms or less.
-	Range: Allows you to specify a numeric range.	<i>List Price: 150-200</i> Finds all listings with a list price ranging from \$150,000 to \$200,000.
,	Either/Or: Allows you to enter multiple values in a single field.	<i>Type: 34714,34474,33897,34787</i> Finds all listings that are within those zip codes.
*	Wildcard: Searches for unknown letters and/or numbers.	<i>Sub-Division Name: *Sun</i> Finds all listings that are located in the sub-division that ends with the word Sun . <i>Street name Sun*</i> Finds all listings that are located in the street that begins with the word Sun . <i>Public Remarks/ Realtor Only Remarks: *as-is*</i> Finds all listings with the “as-in” in the property description or realtor only comments. Use commas to separate multiple keywords, to find one or the other.
!	Exclude Selections: Will exclude listings that contain the excluded search criteria. When using the ! character, it must precede the value you enter.	<i>Year Built: !1960</i> Excludes all listings that contain properties that were built in 1960. <i>Public Remarks: !*as-is*</i> Excludes all listing that contains the word as-is in the public remarks field.