

WELCOME

Converting to Matrix™

A collection of feature-information and to-do items to help get you set up quickly and efficiently



Table of Contents

Conversion Timeline	4
Browser Compatibility	5
Matrix Desktop	5
Contacts	6
Saved Searches	6
Saved Speed Bar Searches	8
Date Since in Saved Searches	8
Personal/Marketing Information.....	7
Auto-Emails.....	11
IDX.....	14
Agent Web Pages and Vanity Websites	14
Market Watch	15
Hot Sheets.....	16
Searching	17
Speedbar Search	17
Search Screens.....	17
Searching by Status.....	17
Searching by Property Type.....	18
Reverse Prospecting.....	19
Agents Working with Potential Buyer(s)	19
List Agents.....	19
Retrieving Reverse Prospects.....	19
Displays vs. Reports	19
Custom Reports	20
Custom Displays.....	20
Setting a Default Display	21
Export	21
Custom Exports.....	22
CMAs	22
Teams	23
Impersonate Another Agent.....	25
Working on Behalf of Another Agent	25
Adding Other Agents as Your Team Members	Error! Bookmark not defined.

How to Set Up a Team.....	25
Input	26
Photos.....	26
Supplements/Documents.....	26

Welcome to Matrix!

We know changing to a new system is never easy. To make the transition smoother, we have put together some information on various features within Matrix. Some are setup-oriented and have “To-Do’s” associated with them. There is a section on some data changes that occurred as well.

CONVERSION TIMELINE

What will convert and what will not? Below is a list of items that will and will not convert from Navica to Matrix. Each are discussed further in this document to help you transition.

Will Convert	Will Not Convert
Listing Data	CMAs
Listing Photos up to 100	Custom Reports
Supplements/Documents	Custom Grids
Contacts	IDX Setup
Open House Data	Vanity Domain Setup
Agent Photos	Personal Information for Reports/Websites
Listing Transaction History – Status and Price	Email Signature
	Incomplete Listings
	Teams
	Saved Searches & Auto-Emails
	Market Watch History

Even though some items are being converted, there may be some changes that you will need to make to your settings in Matrix. Below are “To-Do’s” for you to setup Matrix and make your transition easier.

If an item is not being converted, it does not mean the feature is not available in Matrix. For the non-converted items, you will need to either configure the items in Matrix or export information from Navica as you deem necessary.

As stated above, below is information about various features in Matrix. It goes over the items mentioned above as well as other features. Read through it so you are aware of how things work and what you need to do to make the transition as smooth as possible.

BROWSER COMPATIBILITY

MATRIX DESKTOP

Matrix X is compatible with the latest browser versions supported by mainstream operating systems. Browser-related issues which cannot be resolved by upgrading to the latest version will be reviewed and resolved on a priority and best-effort basis. CoreLogic will support upgrades to browsers as soon as reasonably practical following availability of the new browser version in new retail computers.

Matrix supports the most recent versions of:

- Edge
- Safari
- Chrome
- Firefox
- Android Browser
- Chrome Mobile
- Safari Mobile

NOTE: Microsoft Internet Explorer is no longer supported for standard use in Matrix, however, several staff-only tools still require it. It can also be accessed via the “Open in Internet Explorer Mode” built into Edge.

MATRIX MOBILE COMPATIBILITY

iPad and Android tablet users should install the most recent version of their browser. Matrix Mobile supports the following browsers:

- iOS Safari
- iOS Chrome
- Android Browser
- Android Chrome

Defects reported against other mobile platforms will be fixed on a best-effort basis.

CONTACTS

Your Contacts will be updated at the beginning and end of parallel.

If you edit the Contact in Matrix during the parallel period, that particular Contact will not be updated again. It will be assumed that the data in Matrix is up-to-date and should not be overwritten by what is in Navica.

Contacts must have an email address to be converted. Emails are the unique identifier for contacts in Matrix. Below are some sample conversion scenarios.

1. **Mary Smith, mary@yahoo.com**
2. **Mary Smith, mary@gmail.com**
3. **M Smith, home phone 301-555-1212, mary@yahoo.com**
4. **M Smith, home phone 301-555-1212**
5. **Mary Smith, home phone 301-555-9999**
6. **Bob Smith, mary@yahoo.com, cell phone 301-555-2323**

Based upon the above, you will have the following Contacts in Matrix

1. Mary Smith, mary@yahoo.com, home phone, 301-555-1212, cell phone 301-555-2323
 - a. The conversion process will merge records 1, 3 and 4. Record 6 will also merge due to the email address match.
2. Mary Smith, mary@gmail.com

Record 5 will not convert due to an email address not existing.

Contacts must have a first and last name. If either the first or last name is missing, the email address will be placed in the missing field. Remember, you need a unique email address for each person entered.

To-Do: Review Contacts - make sure all your Contact information converted correctly. Edit your Contacts as needed to add additional information that may be in Matrix that was not in Navica.

- Hover over **My Matrix** then choose **Contacts** to view your Contacts
- Click on the Contact Name to view Contact details.
- Click on the **Edit** pencil icon in the top right corner to update your contact.
- A new screen will appear with a few pieces of information. If you need to see more information about your contact, click on the rollout arrow.
- Click on **Save** when finished.

You can also Add a Contact or Delete a Contact once you are in the Contacts section.

The Contacts, Auto-Email and OneHome Portal features of Matrix are integrated with each other. Make sure you read the sections on Auto-Email and OneHome Portal to understand more about how they work together.

SAVED SEARCHES

Your Saved Searches will not be converted to Matrix. Navica's set up does not currently allow it. Please re-create any necessary Saved Searches from scratch in Matrix during the parallel period. To learn more about searching in Matrix, please consult the Searching section.

To Do: Create Saved Searches

Note: Saved Searches save the criteria of the search, not the results of the search. The same Saved Search run at different times might bring up different results.

- Run a Matrix Search that you would like to save
- Click the **Results** button at the bottom
- Click the **Save** button at the bottom
- Click the **New Saved Search** button (for saving a search as Auto-Email, go to the Auto-Email section of this document)
- For your New Saved Search, enter:
 - *Search Name*
 - *Contact* (connect to existing Contact or create a new contact on the fly)
 - Checkmark *Enable as Favorite Search on Home Tab* if desired
- Save

Run a Saved Search

Note: Your Recent Searches appear at the top right corner of the screen for quick access. Those searches cover the previous seven days or the most recent 50 searches.

- Click **My Matrix** and choose **Saved Searches**
- Click on the **Search Name**
 - You can use the *Search* box to search for a specific search name
- You'll see a new menu where you can click on **Results** to run the search

Additionally, clicking Market Update for one or more saved searches lets you identify new results since your last run or a specific date.

Edit Saved Searches - if you need to modify the criteria of a Saved Search.

- Hover over **My Matrix** and click on **Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name. The Criteria is shown below the option buttons.
- Click on **Criteria** to go to the Search screen if you need to modify.
- Click on **Save** after you've made any modifications.

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

- Hover over **My Matrix** and click on **Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- **Check the box** to Enable as Favorite Search on Home tab & click on **Save**.

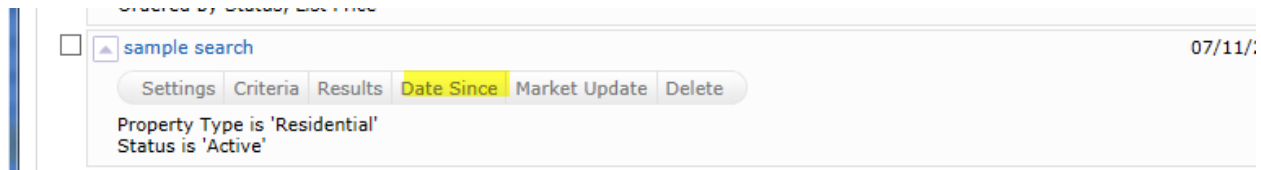
Saved Speed Bar Searches

This is a unique feature in Matrix that was not available in Navica. You do not need to look at this when first setting things up, but you may need to look at it in the future. Speed Bar Search is discussed elsewhere in this document.

NOTE: There is no limit to the number of Saved Searches or Speed Bar Searches allowed.

DATE SINCE IN SAVED SEARCHES

Another unique feature with Matrix is the ability to execute a “date since” search on a saved search. This is similar to the hotsheet feature to see what has occurred since the last time you executed the search. To use this feature, click on the saved search under My Matrix and used the Date Since button shown below.



PERSONAL/MARKETING INFORMATION

The information from your membership system will be in the listings in the system. The settings below will not change how information will appear in a listing. Contact your Association if you need to change your information as it appears in your listings.

Some features in this document will use personal information that is in the system for marketing purposes. For instance, it personalizes your headers or footers on reports. This personal information is not part of your Association's membership system.

Before you start using Matrix, enter all of your personal information first. This will make it so other features will properly work when you turn them on.

To Do: Email Signature – Set this up so you can turn on Auto-Emails and use other email functions.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **Email Signature** tab.
- Edit how you want your signature to appear and click on **Save**.

You can only insert photos for your signature that are used with your Print Header, CMA Cover Page or OneHome Portal Greeting.

To Do: Information – This section contains information used on the OneHome Portal, in print headers and footers as well as other areas of Matrix. You can override what is in your membership system for first name, last name and email address. However, it is highly recommended to contact your MLS to change your membership information at the source for those pieces of information.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **Information** tab.
- Edit the various pieces of information and click on **Save**.
-

To Do: Header & Footer – This is the header and footer that can appear when printing Reports.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select **the Header & Footer** tab.
- If you want to use one of the templates provided, click on Select a different banner image/theme.
- Choose a theme then Click on **Preview**.
- Upload a Photo of yourself, if desired.
- Click on **Save**.
- **OPTIONAL** - If you want to create a Custom Header/Footer
 - Click on **upload custom banner image**.
 - Click on **Browse**.
 - Upload images choose sizing and coloring as desired.
 - Click on **Save**.

Note: For best results, the optimum image size for an agent photo is 100 x 100 pixels and the header/footer banner is 946 x 120 pixels.

To Do: OneHome Portal Information – This is used with your OneHome Portal. The information available includes the items you edited above on the **Information** page. If you do not see many items to choose from, you may need to first edit them on the **Information** page.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **OneHome** tab.
- Modify information as needed.
- Click on **Save**.

Note: For best results, the optimum image size for a portal photo is 500 x 500 pixels

To Do: CMA Cover Sheet – This is used with your CMA and allows you to enter extra contact information just for a CMA. The photo for the CMA Cover Sheet can be a picture of a house or something real estate related. It is not intended for it to be a photo of you, but it can be if desired.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **CMA Cover Sheet** tab
- Modify information as needed.
- Click on **Save**.

Note: For best results, the optimum image size for a CMA Cover sheet photo is 80 x 120 pixels

AUTO-EMAILS

Because Saved Searches are not being converted, all auto-emails need to be set up from scratch in Matrix. If you need help with your Saved Searches, please see the Searching section, further below in this document, for tips.

It is recommended for you to do the following before setting up any auto-emails:

- Watch the **OneHome Walkthrough** video (hyperlink below). This is a tour of the features available in the OneHome Portal. <https://youtu.be/fidopJ2Rmi0>
- Tell your customers the MLS system is changing so they will be aware of the change in the look and feel of the information they will see and receive. Tell them to whitelist/allow emails from the new email of the system stellar@stellarmatrix.com. Include the link to the **OneHome Walkthrough** video above. This will help them understand the changes.
- Personalize your OneHome Portal Information. Build it out so your customers have a pleasant experience and it has your personal branding on it.
- Configure your Header/Footer options. The Header appears on your printed or emailed reports.
- Configure your Email Signature. This will enable your customers to see the information is coming from you along with your contact information.
- Customize your Welcome Letter that is sent when auto-emails are activated.
- If you have a vanity website/domain name pointing to your old system's portal, configure it to point to the new system. See the Agent Web Pages and Vanity Websites section below on how to do it.

When you turn on an Auto-Email in Matrix, you should turn it off in your old system, so your customer does not receive two emails from you.

- If you choose Daily as the option for sending, there is an AM and a PM option. The AM emails are sent at 6:00 a.m. The PM emails are sent at 6:00 p.m.
- Click on **Save**.

To Do: To Set Up Auto-Emails

- Run a Matrix Search that you would like to auto-email
- Click the **Results** button at the bottom
- Click the **Save** button at the bottom
- Click the **New Auto-Email** button
- In the Configuration Menu, enter:
 - *Contact* (connect to existing Contact or create a new contact on the fly)
 - Contact's email address will get auto-populated
 - CC email address, if desired
 - Checkmark *BCC me a copy of all emails* if necessary (the agent version of the email will also contain a direct link to Matrix for that Auto-Email).

Optional: Send a SMS text message to your contact with each auto-email. Your contact must opt-in for texting before they can receive the SMS messages; if they have not yet opted-in, you will be prompted with an option to send the opt-in email.

Once your contact opts in to texting, they will receive the latest alert automatically.

- Subject
- You can modify the Message of the Welcome (1st) or Recurring (all subsequent) email but we generally do not recommend modifying those until you are very comfortable with Matrix
 - Your customers have 30 days from the day of the email to activate the customer portal functionality
- If you Enable Concierge Mode, you will be notified each time new listings are ready for review and will need to approve each listing. You will see an alert in Matrix when new listings are ready for review, and if you select 'Also send me the alert notification by mail' you will receive email alerts of new matches.
 - Concierge is a specialized type of Auto-Email. When an Auto-Email is created in Concierge mode, the agent receives Auto-Email notifications before they reach the customer and has the opportunity to review the results and choose which are sent along to the customer, and which ones are not. The intent of this feature is to give Matrix users the opportunity to provide "premium" service to particular customers.
- Scheduled auto-emails go out automatically and do not require approvals - Choose your *Schedule* based on your customer's needs
 - AM emails are sent at 6PM ET; PM emails are sent at 6PM ET
- Save

Customers must opt-in to the first auto-email they receive; clicking on the 'welcome' email link will take them to OneHome and optionally allow them to create an account. Subsequent auto-emails for the same contact are auto-enabled.

To Find Existing Auto-Emails

- Click **My Matrix** and choose **Auto-Emails**

- From here you can review results, update settings and criteria, or view the sent email history for your contact.

Note: A maximum of 400 records are returned with a search associated with Auto-Emails. Please make sure the Saved Searches that are enabled do not return more than 400 listings. If the search returns over 400 listings, you will be prompted to edit the Saved Search criteria.

Once an Auto-Email is setup, the email will be sent to your customer. The status of your Auto-Email will be one of the following:

- Auto Email is Active, but the Contact has not yet accessed the results.
- Auto Email is Active and has been accessed by the Client.
- Auto Email is disabled by client or agent.

A customer can unsubscribe from just one email, or from all emails from one agent. If your customer is not receiving an email, make sure they did not unsubscribe from your emails.

If an auto-email has been setup and it returns zero listings for 90+ days, it will be disabled by the system. Also, if an auto-email is not opened by your client, it will be disabled after 30 days.

IDX

The IDX option in Matrix allows you to use an iFrame for your website to allow your customers and clients to search from the MLS. This option is for those who have a website where they can edit the content and web pages.

If you do not have a website, check out the Agent Web Pages option below. It gives you the functionality of a website without having to develop one.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings**, then **IDX Configuration**
- Choose a **Name** for your page.
 - If you are only going to create one, you can enter something like “General IDX Search”. If you are going to create different iFrames, say one with map search and one without map search, name them accordingly.
- Choose the form selection
 - **Search** allows consumers to look for properties on their own
 - **My Listings** promotes your own or your office’s listings
 - **Map Search** allows consumers to look for properties using a map and search form
- Choose the **Map Area** (Only applicable if the **Map Search** option was selected)
- If you chose Restrict Searches to a Specified Map Area, you will need to use the **Set Map Area** option to specify the area for the restriction. Make sure you **Save** the Map Area.
- Under Activation, choose **IDX Enabled**.
- Add any of the **Other Options** desired.
- Click the **Preview** button at the top right corner if desired.
- Click on **Save**.
- HTML will be generated for your iFrame under the Activation section.
- **Copy the HTML** to give to the person who manages your website content.

If you have an existing IDX site, you can replace the HTML you currently use with the one generated above any time after parallel begins. You must do it before cutover or your website will no longer operate correctly.

AGENT WEB PAGES AND VANITY WEBSITES

If you do not have a website, no worries! Matrix allows agents to have a web presence without developing their own website. These are known as Agent Web Pages. If you have your own domain name (vanity website), you can redirect your domain name to Matrix’ Agent Web Page. However, you do not need a vanity website to use an Agent Web Page. A URL will be provided that you can give you clients and customers if you don’t have a vanity website.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Click on the **Agent WebPage** tab.
- **Enable** the Agent Web Page.
- Enter the **Web Page URL**.
 - If you do not have a vanity domain, you will use this URL for your customers. Choose something that is short but identifies you/your page.

- If you do have a vanity domain, you will provide this URL to your domain service to redirect your vanity name to it.
- Create your **Homepage Content**.
- Choose the **Map Area** option desired.
- Fill in the **Other Options** section, if desired.
- If you have a vanity domain, add it under **Additional Domains**. This will be used for security purposes so we can validate the sites pointing to your Agent Web Page.
- Click on **Preview**. Make changes as needed.
- Click on **Save**.
- **Notify your domain registrar** if you have a vanity website.

If you have an existing vanity website, you can replace the information with your domain registrar any time after parallel begins. You must do it before cutover or your website will no longer operate correctly.

MARKET WATCH

Market Watch is available on the Home page to provide you a quick look at what changes have occurred with listings in the system.

NOTE: FCAR MLS listings will not be reflected in the Market Watch during the Member Parallel period while Navica is still the source of truth for the FCAR listings. FCAR listing will start showing in Market Watch once the full transition to Stellar Matrix system is completed.

Below is an explanation of the first few Change Types.

- New - Listings that are new to the system (see time frame below).
- Back On Market – Listings that have moved from Pending, Withdrawn or any other Off-Market status back to active status.
- Price Decrease – Listings where a decrease in price occurred.
- Price Increase - Listings where an increase in price occurred.

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

- Property Type – Used to switch between Residential, Income, etc.
- Timeframe – Used to switch between Today, 24 hours, 3 days and 7 days. In the past, New was always 7 days. Matrix allows more flexibility associated with the timeframe.
- Customize – Used to narrow the criteria instead of defaulting to all listings.

HOT SHEETS

As with Market Watch, Hot Sheets are available from the Home tab of Matrix. Hot Sheets are searches that can use the Change Types in the system to provide quick information on what has happened recently in the market.

NOTE: FCAR MLS listings will not be reflected in the Hot Sheets during the Member Parallel period while Navica is still the source of truth for the FCAR listings. FCAR listing will start showing in Hot Sheets once the full transition to Stellar Matrix system is completed.

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

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings**, then **Hot Sheets**.
- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.

Or

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

To run a Hot Sheet, follow these steps:

- Choose the **Timeframe** desired –
 - This Session – Since you logged into Matrix
 - New Only – Since the last search you ran
 - 24 Hour – In the last 24 hours
 - Today – During the current day
 - 3 Day – In the past 3 days
 - 7 Day – in the past 7 days
 - Custom – allows you to choose any timeframe
- Click on the **Hot Sheet** desired.

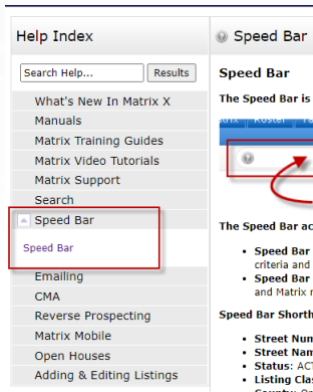
Note: There is a limit of ten (10) Hot Sheets that can be accessed from the Home tab of Matrix.

SEARCHING

There are two ways to Search in Matrix. One is on a Search Screen and the other is with the Speedbar. You can create saved searches for both. Speedbar Saved Searches are for use within Matrix only. Saved Searches from a Search Screen can be attached to a Contact and setup as an Auto-Email, if desired.

SPEEDBAR SEARCH

Speedbar Search is for shortcut searching. This is where you will search by MLS Number. There is no need to be on a Search Screen to use the Speedbar. When in Matrix, click on the Help icon next to the Speedbar for tips on how to use it. Also, help is available from the Help option on the Utility Menu under FAQ's.



One of the best ways to learn how to use the Speedbar is to watch what Matrix puts in the Speedbar when you do a regular search. The Speedbar will be filled in, even if you didn't use it. For instance, by searching Active, Residential listings in Avon, the Speedbar filled in the following.

My Matrix Search Stats Tax Lin



Just like regular searches, Speedbar searches can be saved too. These use the slash ("/") to identify them from a non-saved Speedbar search.

SEARCH SCREENS

Search Screens allow you to search by using all the various criteria in the system. This can include items such as select values for appliances and/or list price. Use the Search tab to access all the Search Screens created in the system. There are Search Screens for each of the Property Types, Open Houses, Public Records, Agents and Offices.

SEARCHING BY STATUS

Searching by Status has the option to enter a Date Range or the Days Back to the criteria. Each Status has a date associated with it and the system is configured to know what date to look at. For instance, Active uses On Market Date, Expired uses Expiration Date, and Sold uses Closed Date.

If you are saving a search and want the dates to change as time progresses, you should use the Days Back feature. Here's an example:

Scenario - Today is 7/1/2021. You want to save a search with various criteria for a client (enter city, price, beds, baths as needed). You only want to find listings brought on the market in the past 14 days. Both methods will return the same results on 7/1/2021.

- Using Date Range – To obtain the last 14 days of listings, you would enter 6/17/2021-7/1/2021. However, the Date Range method will continue to give you the same exact listings each time the search is run. On 7/2/2021, it is still looking at the 6/17-7/1 in the criteria.
- Using Days Back – To obtain the last 14 days of listings, you would enter 0-14. With Days Back, it provides a rolling timeframe associated with the search. It will always return the past 14 days of listings as time progresses.

Statuses changed slightly with the conversion:

Navica		Matrix
Active	→	Active
Active Under Contract	→	Pending
Withdrawn/Void	→	Canceled
Withdrawn	→	Withdrawn Conditional
Pending	→	Pending
Expired	→	Expired
Sold	→	Sold
Rented	→	Leased
Temporarily Off Market	→	Temporary Off-Market
Deleted	→	Will not be brought over to Stellar

NOTE: Any incomplete FCAR listings will not be brought over to Stellar.

To Do: Review any incomplete Listings – If you have incomplete listings that need to make their way into Stellar MLS make sure to set them to Active before the Cutover.

Searching by Property Type

With Matrix, searching by more than one property type at the same time is possible. To search by more than one property type, please select Cross Property Search from the Search drop-down menu. There are also Property Sub Types that are available for each Property Type.

REVERSE PROSPECTING

This feature facilitates agents getting in touch with each other for their clients' mutual benefit. Listing Agents more easily find other agents with buyers looking for properties like the ones they represent for sellers. Agents representing potential buyers become more aware of available properties matching their buyers' criteria.

AGENTS WORKING WITH POTENTIAL BUYER(S)

To make a contact available for Reverse Prospecting, click the "Enable Reverse Prospecting" checkbox under the contacts detail page. That contact will become available for reverse prospecting by other agents, identified by a unique ID.

LIST AGENTS

If you have a listing you want to conduct Reverse Prospecting on, go to the "My Listings" screen (*under the My Matrix menu*), select the listing you want to Reverse Prospect, and click the "Reverse Prospect" button. The display will show you a list of agents with contacts who have received your listing. If you contact an agent, be sure to give them the numerical ID from the display so they can easily find the matching customer.

NOTE: Reverse Prospecting is completely anonymous for your buyers. List agents are not given your customer names or contact information. A numerical ID is used to keep it anonymous.

RETRIEVING REVERSE PROSPECTS

To retrieve your prospects, follow these steps.

- Hover over **My Matrix**, then click on **My Listings**
- Select either '**My Active Listings**' or '**My Hit Counters**' from the "Show" dropdown box
- Check off the desired listing you wish to view Reverse Prospects for.
- Click on the '**Reverse Prospect**' button below the results.
- This will produce a list of all agents who have clients set up on Auto Email which match your property.

DISPLAYS VS. REPORTS

In Matrix, there are Displays and Reports. There is a difference between the two. Below is what distinguishes the two from each other.

Displays

- HTML based information seen after you search in your browser.
- Printable from browser, with an option to include/exclude the header
- PDF version available with option for header to be added.
- Options to include/exclude photos if applicable

Reports

- PDF reports that are created with Crystal Reports that allow additional functionality over HTML.
- Different styling is possible and usually creates a more aesthetically pleasing view of the data.
- Aggregate functions available (i.e. Median, Average).
- Headers/Footers are defined by the report configuration

The displays and reports were created with your MLS's help. If you have feedback on what should be on a display or report, please contact your MLS with your suggestion.

CUSTOM REPORTS

Your Custom Reports in Navica will not be converted to Matrix. Unfortunately, the systems differ too much to make it possible.

Please see Custom Displays to see what is available for you to create in Matrix.

CREATE CUSTOM PDF REPORT

You can create a Custom PDF Report by using the following steps:

- Run a Search. The Cross Property Single Line is the default display.
- Select the checkbox of the listing you would like to perform a custom PDF report on. Click on the **Custom PDF Reports button** at the bottom of the page.
- Click the Dropdown arrow for "Report Settings & Background and Font Colors" in order to customize your report.
- Select the report you would like to create from the "Available Reports" section.
- Click on the "Create PDF Button".
- Either open or download your custom PDF Report.

CUSTOM DISPLAYS

Your Custom Reports in Navica will not be converted to Matrix. Unfortunately, the systems differ too much to make it possible.

In Matrix, you can create a Custom Display by using the following steps.

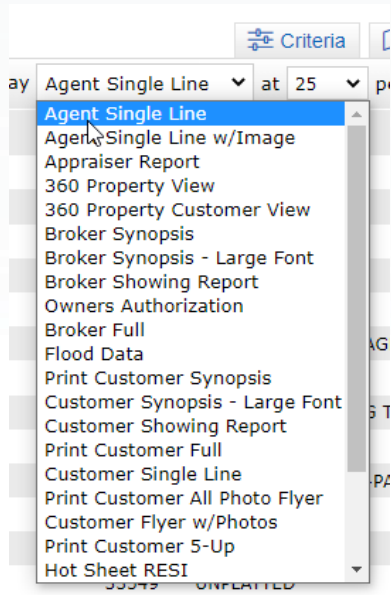
- Run a Search. The Cross Property Single Line is the default display.
- Hover over the icon to the right of "per page". (It looks like a page of paper with a pencil on it.) It will say Manage Displays. **Click on the Manage Displays icon.**
- Choose **Save as a Copy.**
- Click on Your Name in the top right corner to access the **Utility Menu.**
- Select **Settings**, then **Custom Displays.**
- A list of Custom Displays will be shown.
- Click on **Edit** and you can add or remove items as needed.

There is no option to create full-page reports in Matrix. It is recommended to use Microsoft Word to create a report or flyer for your listings.

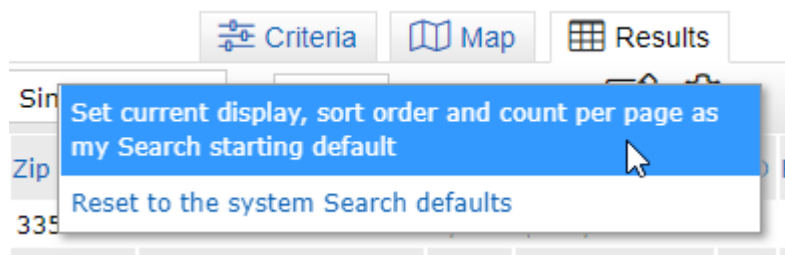
SETTING A DEFAULT DISPLAY

When searching, the default display is the single-line summary. To change this to a different system display or one that you customized under Custom Displays, use the following steps.

- Run a Search. The single-line summary will be the default display.
- Choose the display desired, such as Agent Thumbnail, from the Display selection menu at the top of the single-line display.



- Select the **set default wheel** located to the right of the Display options. Choose the **Set Current Display** option.



- To return to the single-line display as your default, choose the Reset option instead.

EXPORT

A system export exists which will allow you to export the information that is on the system single-line display. To use the Export feature, follow these steps.

- Run a search.
- Select the listings desired using the checkbox.
- Click on **Export**, located at the bottom of the screen.
- Choose the Export **file format** desired.
- Click on **Export**.

CUSTOM EXPORTS

If the system export is not sufficient, you can create your own export layout. Follow the steps below to create your custom export file layout.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings**, then **Custom Exports**.
- Choose **Add an Export**.
- **Name** the Export layout.
- Choose the fields desired and click on **Add** to move them to the Export Fields side of the screen.
- Choose **Label** if you would like a header with the data.
- Choose your preference between Comma delimited or Tab delimited.
- Add a description, if desired.
- Click on **Save**.

Your export format will now be available from the Export function on the search results screen.

CMAS

CMAs from your old system will not be converted to Matrix. Unfortunately, the way they are stored in the system makes this not possible. If you have CMA's you need from Navica, we recommend you save each CMA as a PDF on your computer. Or, you can recreate the CMA with Matrix.

There is no limit to the number of CMA's you can have. CMA's with over 365 days of inactivity are purged from the system.

START A MANUAL CMA

To create a CMA from scratch, follow these steps:

- Hover over **My Matrix**, then click on **My CMAs**
- Click on **Start a New CMA**
- You will be walked through the CMA Wizard. This will include the following items:
 - **Start** - Select a CMA Contact, language and type
 - **Cross Property** CMAs contain only listing data
 - **Matrix 360 Property** CMAs contain a blend of MLS and Public Record data
 - **Pages** - Select the Pages for the CMA
 - **Subject** - Select a Subject Property
 - **Cover** - Edit the Cover Information
 - **Comparables** - Search for and add Comparables
 - **Map** - Review Map information
 - **Adjustments** - Make Adjustments to the comparables based upon the attributes of the listings.
 - **Pricing** - Review the Pricing section. Add in your **Suggested List Price** and **Notes**.
 - **View, Save, Print and/or Email** the CMA as needed throughout the process.

At times, some items in the Wizard may not be available. Certain Pages need to be selected for options to be available. For instance, if you have not chosen a Cover Page to print, the Cover option will not be available.

START A CMA USING THE COMPARABLE FINDER

To start a CMA using comparables suggested by Matrix, follow these steps:

- Run a search for a specific listing or Public Record
- View the **360 Property View** and click the **View Comparable Properties** button
- Matrix will return up to 20 comparable properties based on your subject property
 - You can remove or add comparables
 - Click **Find More Comparables** to find additional records or see the criteria used to return the initial results
- Generate a CMA report with the **View Report** and **Email** buttons, or click **Create CMA** to enter the CMA Wizard and customize your CMA.

TEAMS

The Teams feature will give agents and assistants the ability to impersonate or work on behalf of their peers within their office, through Matrix. In addition, any listing with a team entered on listing input will be recorded for production credit and will reflect on market reports.

Note: Matrix will only allow you to add someone to your team who has an Active Matrix ID in the system.

HOW TO SET UP A TEAM

Below are the steps on how *Brokers, Office Assistants, or Company Assistants* can create and manage teams through the broker portal.

**Note: Only the head broker, office assistant, or company assistant can create a team. Once team is created, the designated team lead will then have their own portal on his/her account, that will allow them to manage their team. Agent can only be leader of one team and must have an active Matrix account. Assistant cannot be a team lead.*

- Login to the Stellar Dashboard.
- Select **My MLS Account** from the left navigation menu bar
- Select **Manage Office Teams** icon
- Click on **Manage Office Teams** button for the office you like to manage your team
- Click **+New Team** to create a new team or click **Edit** to make changes to existing team
- Fill out 'Team Information' form – **Team Name, Team Leader, Impersonation, Team Status, and Team Type**
- Fill out 'Team Contact Information' form – **Address Line 1/2, City, State, Postal Code, Mobile Phone, Main Phone No., Email Address**
- Click **Save Team**
- 'Team Member' section will then appear, Click **Add/Remove Members** to add team members either to Impersonate or to Work On Behalf of the Team Lead.
- Click **Save Changes** when you've finished adding team members
- Once you've saved your changes, you'll be directed back to the Managing Team page. You can update any team information if you wish, if not you can then click the **Back To List Of Teams** button located at the bottom to return to main list of all teams set up for the office

Below are the steps on how the *Team Leader* can manage teams through their Stellar portal.

- Login to the Stellar Dashboard
- Select **My MLS Account** from the left navigation menu bar
- Select **Manage Your Teams** icon

After enabling the Team function, you will be alerted to it on the Home page each time you login.

When one of your team members logs in, they can switch from their own individual login to the Team login by clicking on their name in the upper-right corner of the screen to open the select popup. There, they can click to select the team's name.

ADDING OTHER AGENTS AS YOUR TEAM MEMBERS

Each user that is added to your team will have full access to your Matrix account and can either “impersonate” or “work on your behalf” depending on the type of access you grant them.

They can now see in the upper-right (and highlighted in yellow on the Home page) that they are working as the team. When clicking on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to the Team's items. When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone. If they are set to impersonate you, they have the same choice except that if they select the Team, it will use your email address, not theirs.

To leave working as the team and go back to working as yourself, click the “Working as” link in the upper right of the screen and click to select your own name.

ASSIGNING TEAMS TO LISTINGS

Below are the instructions on how to add a team to an *existing active* listing.

- In the top navigation bar in Matrix, click on the **Add/Edit** tab.
- Click on **Select a Listing** option to see your current listings.
- Select an Active listing from the list.
- Click on Residential – **Add/Edit Listing Fields** (Property Type may vary, Ex: Rental – Add/Edit Listing Fields)
- Click on the **Realtor** tab
- You will find the **List Team ID** field within the Agent/Office section.
- Start typing name or the Team ID for auto-search.

**Note: For listing credit, team must be active, Team Type must be set to Production Credit (this setting in Manage Your Teams portal) and at least one list agent must be on the team.*

Getting Started Listing Pool/Exterior Land and Tax Interior Rooms Water Green Owner Community **Realtor**

Agent/Office

List Agent ID Tweety Bird(896574258) Refresh	Agent Name and Information Tweety Bird 456-555-1212 david.cox@stellarmls.com	Office Name and Information 234586971 TESTBRANCHOFFICE2 456-555-1212 Pinellas Suncoast
List Agent 2 ID Agent Name or ID Refresh	Agent Name and Information	Office Name and Information
List Team ID Team Name or ID Refresh	List Team Name	Interoffice Info

IMPERSONATE ANOTHER AGENT

If an agent you work with added you to their team in Matrix and set you up to impersonate them, you would be able to do the following things:

- Emails sent from Matrix would be sent from their name and email address and would use their email banner and footer (if they had chosen one) and email signature.
- Print reports – any reports that are printed while impersonating another agent will have the information of the agent being impersonated in the “Courtesy of” information. In other words, the report will look as if it were printed by the agent that you are impersonating.
- Access another agent’s Matrix Contacts, Saved Searches (you cannot change their team settings) When you send an email from Matrix while you are impersonating another agent, the name and email address in the “From” line will be highlighted in yellow. This is to call attention to the fact that you are sending that email as that agent. This means that to the client, the email will look exactly as if it came from the agent being impersonated.

WORKING ON BEHALF OF ANOTHER AGENT

If an agent you work with added you to their team in Matrix and set you up to work on behalf of them, you would be able to do the following things while working on behalf of them in Matrix:

- Emails sent from Matrix would be sent from your name and email address on their behalf, and would use your email banner and footer (if you have chosen one) and email signature.
- Print reports - any reports that you print while working on behalf of another agent will indicate that they were printed by you on behalf of the other agent.
- Access their Matrix Contacts, Saved Searches (you cannot change their team settings)

INPUT

Matrix allows you to input listings along with Photos, Supplements and Open Houses.

Roles are assigned to each person using Matrix. An agent can edit any of their own listings or where they are the Listing Agent or Co-Listing Agent. An office manager can edit listings within their office. A broker can edit listings at the firm level, if needed.

NOTE: During Member Parallel, you will continue to input new inventory and manage your existing listings on FCAR Navica system. Access to Matrix input will become available once the full transition from Navica is complete – after the Cutover.

PHOTOS

With Matrix, when adding a listing there is a status of Incomplete. The incomplete status cannot be seen when searching, only when using the Input portion of Matrix. This status allows you to be able to add up to 100 photos prior to submitting the listing to the system.

When entering a Photo with Matrix, you can enter a Description. This can be a title, such as “Kitchen”, or a description about the photo, such as “View from back deck overlooking Lake Smith”

SUPPLEMENTS/DOCUMENTS

Documents are called Attachments in Matrix, as they do not need to be an actual document. All of your documents from Navica converted into Matrix along with your listings.

Attachments can be any file type (.DOC, .PDF, etc.). However, it is recommended you upload documents in a PDF format. This makes the document read-only and does not allow anyone else to edit your document.

Attachments in Matrix can have a file size of 10 MB. There is a limit of 15 attachments per listing. All attachments are only visible within Matrix. They are not visible to the consumer.