

# Cheat Sheet

***matrix.mris.com***

## Getting Started

### Create a shortcut to Matrix

- From the Desktop, right click on any blank area.
- Click New, then click Shortcut.
- From the Create Shortcut window, type in <http://matrix.mris.com>
- Click Next to continue.
- In the Select a Title window, delete the pre-filled field that says New Internet Shortcut.
- Type in Matrix and click Finish

### Make Matrix your Homepage

- Go to the Matrix login page, [matrix.mris.com](http://matrix.mris.com).
- Using Internet Explorer as your Browser, click on Tools, then Internet options. (The Address will say <http://matrix.mris.com/matrix/login.aspx>, reflecting the page you are on.)
- Click the button underneath that says Use Current.
- Click Okay.

### Add your Website to your Listings

Go to [mris.com](http://mris.com), in the upper right corner click on the white link that says My Account, click on Contact Information, type the URL into the field labeled Website, click **Update** at the bottom.

## Preparing to Email listings

### Set up your Email Address

- Go to [mris.com](http://mris.com) (you can click on the MRIS logo from the Matrix site).
- Click on My Account. You will be prompted to enter your ID and password.
- Click on the link for Contact Information.
- Enter the email address you use for clients under Public E-mail.
- Click on Update at the bottom or top of the screen.

### Set up your Signature

- Click on My Matrix tab.
- Click on Settings.
- Enter a Signature and click Save.

If your email address and signature are already entered, then you are ready to email listings to your customers.

### Emailing

- Run a search.
- Check the boxes next to the properties you want to email.
- Click on Email.
- Choose the Contact from your list of Contacts, or enter email addresses into the To, CC, or BCC lines.
- If you want a copy of the email, check the box Send to Me.
- Type in a Subject.
- Select the Format (type of report layout)
- Modify the Message as needed.
- Click on Send Email.

### Add Contacts

- Click on the My Matrix tab at the top of the screen.
- Click on Contacts.
- Click Add Contact.
- On the next screen, type in your client's first and last name.
- Enter the email address.
- Click Add.

### Edit a Contact

- Click on My Matrix tab.
- Click on Contacts.
- Click on the pencil icon next to the contact you want to edit.
- Edit any of the information for this contact.
- Click the blue Save button after making changes to save the information.

## Search

Search symbols are used with numeric and date fields such as number of bedrooms and baths.

Below are examples of how to use searching symbols with a list date.

10/15/03	Returns exact date match
10/15/03-10/17/03	Returns date range
10/15/03+	Returns that date and higher
10/15/03-	Returns that date and less

The other Date option is known as "Days Back".

0	Returns Today
1	Returns Yesterday
2	Returns past two days
1-	Returns Yesterday or less
0-3	Returns between Today +3 days ago
1+	Returns Yesterday + greater

**Text Search** - You can use combinations of the items below in your text searches.

**Multiple Values** - In a text field, such as City, you can enter multiple values separated by a comma, e.g. *Fairfax, Rockville, Washington.*

**Wild Card** - If you are unsure of spelling or there are multiple areas starting with the same word use the asterisk (\*) to indicate a wild card search, e.g. *King\** instead of *Kingston Chase.*

**Not** - To indicate you do not want a certain text value as part of your search use the exclamation point (!), e.g. *!Springfield.* You may mix your preferences with the NOT item in the same field, e.g. *!Springfield, Fairfax, Arlington.*

**Picklist search**- Selecting Multiple Items - To select multiple items from a list use the CTRL key. To de-select an item, use CTRL as well.

**Age search** - Age is an automatic calculation displayed in Matrix. It is calculated based on what was entered in the Year Built field so it is dynamically updated. When searching in Matrix use Year Built instead of age.

Searching Examples:

2003+ homes built in 2003 until present  
1875 houses built in 1875 only  
1950- houses built in 1950 or before

### Save a Search

- At the bottom of the results screen, click the blue Save button.
- On the next screen, type in a name, description, or attach to a contact. Only name is mandatory.
- You can attach this search to a contact in your address book, but this step is optional.
- After you have filled in the information you want, click Save.
- You can run updates to this search at a later time by clicking on the My Matrix tab and clicking on Saved Searches/Market Updates.

### Add Search Fields

- Toward the bottom of the screen, click on the Fields you use frequently link.
- To add a field, highlight it, and click the blue Add button.
- You can highlight several fields by holding down the Ctrl key, and clicking the blue Add button.
- Use the up and down blue buttons on the right to put the fields in the order you want.
- Click Return to Search.
- The fields you added will be displayed at the bottom of the screen.
- Fields that you add will never delete and will remain there until you remove them.
- Fields that you add will appear ONLY in that search type screen and will not cross-populate into other types of searches.

### Delete Saved Searches

- Click on My Matrix, then click on Saved Searches.
- Put a check in the box next the saved search that you want to delete.
- Click the blue Delete Selected button at the bottom of the screen.
- Confirm that you want to delete by clicking on the blue Ok button.
- Click Save.

### Cross Property Search

The Cross Property Search is used when a County entry is not required and will allow you to conduct one search for all property types in all counties.

Here is an example of how to search for all listings in your office.

- Log into Matrix and click on the Search tab.
- Directly below the tabs in the dark bar, click on Cross Property.
- Click on General to get to the criteria screen.

(cont.)

### Cross Property Search (continued)

- Scroll down to Fields You Use Frequently, click the link below it.
- In the Available Fields Column, find ListOfficeCode and highlight it, then click the Add button to move it to the Selected Fields column.
- Click the Return to Search button.
- Select the Listing Statuses you'd like to search or any other criteria you'd like to select for this search.
- Scroll down and enter your office code the ListOfficeCode field. (NOTE: Include letters and numbers, ex: MRIS1)
- Click the Search button to generate results.

### Open a Second Browser.

This is handy if you want to add/change column settings, perhaps create a new contact, or even move to the tax records without losing your place.

- Open a second Browser window with Cntrl N or right click on the My Matrix tab.
- Make the change, and either minimize the second window or close it with the X in the upper right-hand corner. Avoid using Logout since it will end the whole Matrix session in both windows.
- Then REFRESH the original window so that the new choice/change will be visible.

## Search Result Displays/Reports

### Save a Default Display

To change the results to your favorite view as the default, change the display type in the dropdown list at the bottom of the screen **BEFORE** you click on Search. It will automatically be remembered as your default the next time you search in the same property type.

If you have accidentally saved a display type you no longer want, change it to the one desired and click on Search to re-save the default.

### Change the Display after a Search

The search results display defaults to a one-line view if you did not change it with the previous steps. You can change this by selecting a new option in the Change Display To list. (Located at the bottom of the screen under the blue buttons.) Choose the display desired and the results will be automatically re-display in the format you selected.

### One-Line Summary Display

-- **Sort by column** - By clicking on the column headers, the data will sort. This is available for 500 or less search results. It will sort the results between screens.

-- **Check box** - Used to select results. Once you place a check in the box next to a listing, you are selecting the listing for

an action: Printing/CMA, Emailing, Hiding, Exporting, or Mapping.

-- **Binocular icon** - The binoculars are used to add a listing to your Watched Listings. This is an easy way to keep an eye on listings in which your client is interested. You can specify for whom you are watching each listing, and it will show you the date that each property was added to your Watched Listings.

-- **Car icon** (yellow block) -- Clicking on this icon brings up a map, showing the location of the property.

-- **Camera icon** - Clicking on this icon brings up a photo of the property.

-- **Movie Reel icon** - Clicking on this icon will bring up the Virtual Tour of the listing.

**Not getting the right results in a search?** Be sure to click the CLEAR button at the bottom of the page to remove the previous search criteria lurking in the table choices.

### Create Columns in Matrix

You can create your own column settings by following these steps:

- Click on My Matrix tab.
- Click on Manage Column Reports.
- Select Table Type and Table.
- Click the blue Add Report button.
- Type a name for the report in Column Report Name.
- Choose the columns for your report in the Available Fields box - you can highlight multiple options by holding down the Ctrl key.
- Click on the blue Add button to move the selected column options to the Column Report Fields box on the right. If you want to remove an option, highlight it by clicking once on it and then click on Remove to delete it.
- Use the blue Up and Down buttons to change the column order.
- For the options Checkbox, Watch, Map, Photo, Virtual Tour, and Link to Full, put a check next to the ones that you want to appear on your column report.
- Click the blue Save button to save your report.
- You can edit and delete existing reports from the Manage Column Reports screen.
- Your new column report will now be available to select from any Change Display To dropdown fields. It will be preceded with "My". All custom columns starting with "My" will appear at the beginning of the list.

## Printing

### Print Reports in Matrix

- Perform a search.
- Place a check next to the properties you want to print. You may check or "tag" properties from several pages of displayed results.
- Click on the blue Print/CMA button.
- Select the Print Report desired. To choose more than one report, use the CTRL key and select. To de- select a report use the CTRL key as well.
- Click the blue Generate button.

Optional: rather than tagging the items you do want, you may also do the opposite and tag the lines you do not want and then click the blue **DROP** button at the bottom of the page. That button will then change to say **INCLUDE DROPPED** so that clicking on it will restore those lines at your discretion.

NOTE: To obtain user-friendly reports, go to the Print/CMA button. Select one or more of the reports. Printing from the screen display by clicking on FILE and PRINT is not recommended.

NOTE: If you are having trouble printing CMAs in Matrix, your computer's pop-up blocking software may be to blame. You may need to disable it or possibly remove it.

### Adobe Acrobat 6.0's Compatibility with Windows 98 and Windows ME may print garbage.

If this happens to you, before printing your \*.pdf document try the following:

- Choose File, click Print, and then click Advanced.
- Select Print As Image.
- Click OK to close the Advanced Print Setup dialog box.
- Click Print.

## Export

### Export to Microsoft Excel from Matrix

- Click on the Search tab in Matrix . Below the tabs click on either Residential, Lot & Land, Commercial, Multifamily, or Cross Property.
- Click on the General link.
- Select your search criteria then click the Search button.
- Choose the listing(s) you want by clicking the checkbox.
- At the bottom of the page click the blue Export button.
- Select Residential Default and click the blue Export button.
- From the File Download prompt click the blue Save button.
- When the Save As window appears rename the file with a .xls extension (ex: subdivision.xls).It should now automatically open in Excel.

## Tips

The maximum number of labels to run is 5000.

The maximum number of records to return in Statistics is 5000.

The SORT button is not available when the search results exceed 500.

To search for **Open Houses**, go to the bottom right of the screen to the "Search Selected For" box.

Days On Market are calculated differently in Matrix. Now, when a property becomes non-active, those days are not included in the DOM value.

Legal Subdivision is automatically populated from the Tax Record in Matrix, not via agent entry through Data Input or Keystone.

## Training

Don't forget to take advantage of the following training options:

Interactive Online Training Tutorials  
<http://mris.com/tutorials/>

Download Manuals  
<http://mris.com/download/manuals/matrix/index.cfm>

Sign-up for hands-on classes  
<http://mris.com/education/schedule/index.cfm>

Updates of this document will be posted on the Matrix homepage.