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SETTING SEARCH DEFAULTS in MATRIX

Default Search Criteria

Once a search form in Matrix is opened, enter the criteria that you would prefer as the starting point for all future searches. By default, Matrix applies a Status of "Active" and search area of "Florida". As a reminder, "Florida" would equate to the Stellar MLS coverage area in Florida and any listing out of the area that was entered into the system. A map displaying the primary Stellar MLS coverage area is available at https://www.stellarmls.com/about/shareholders.
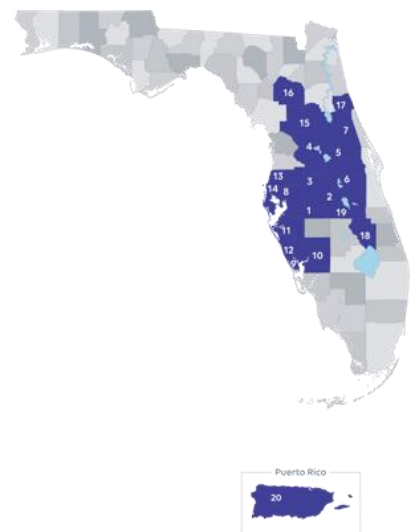
For example, if you would like to have Active listings in Flagler County as your search default for the Residential listing classification, open the Quick or Detail search form, enter Flagler in the County field then click the gear icon near the upper-right of the form and select "Set currently selected search criteria as my starting default" from the options displayed:
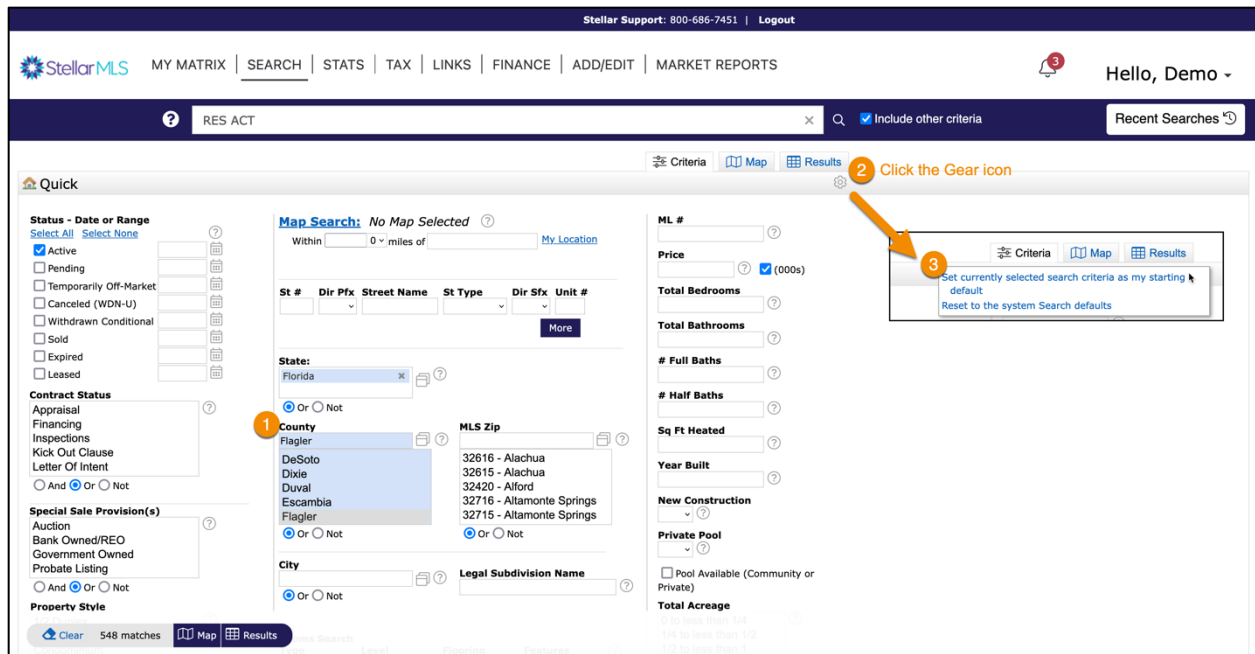
Once selected, Matrix will then use this criterion as the starting point for future searches. Please note that not all property classification search forms in Matrix are affected. If another search form is opened, Income for instance, you would need to repeat the process described above.

Default Map Area

Another option in Matrix is to set a default Map display area. Begin by opening a search form in Matrix then click the Map Search hyperlink or Map tab near the top right of the form.
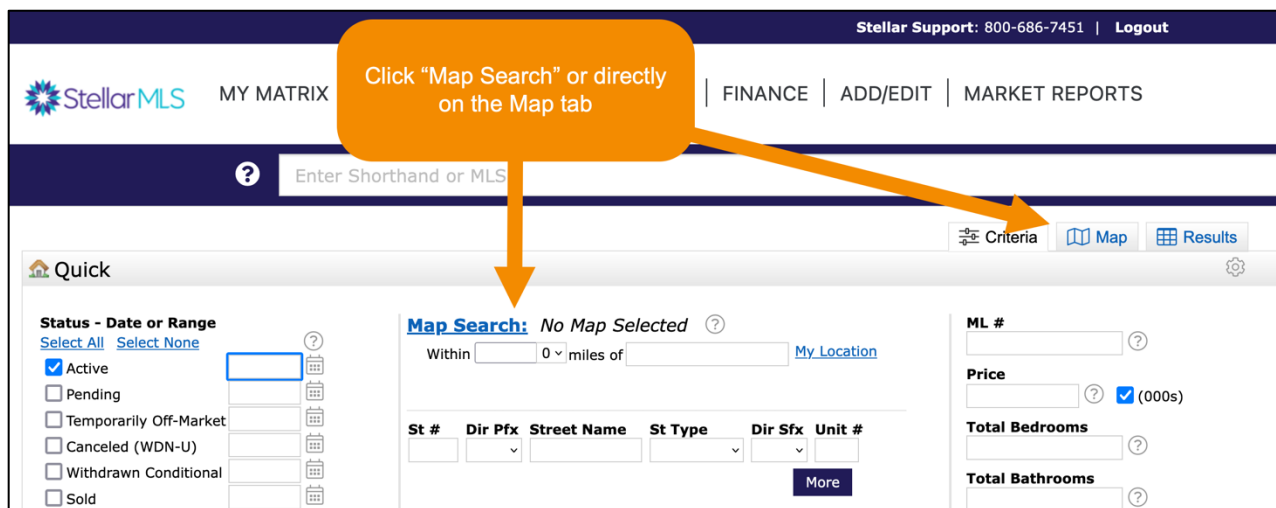
Once the map display opens, reposition the map as desired. To quickly jump to a particular location, such as Flagler County, use the field just below the three tabs (Criteria, Map, and Results) near the upper-right corner of the map.
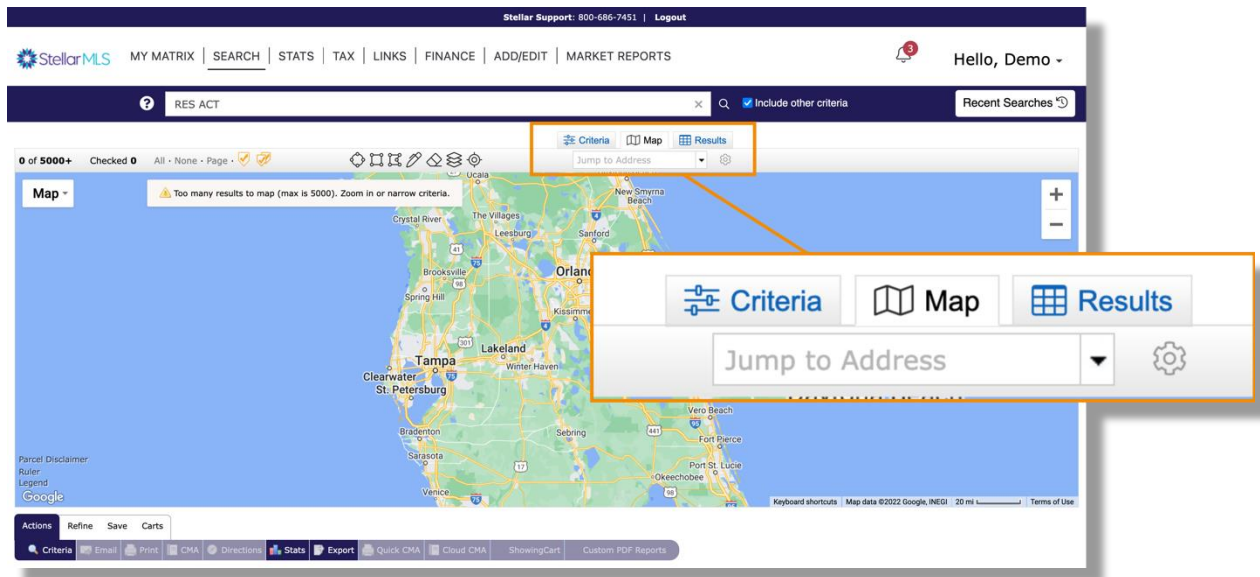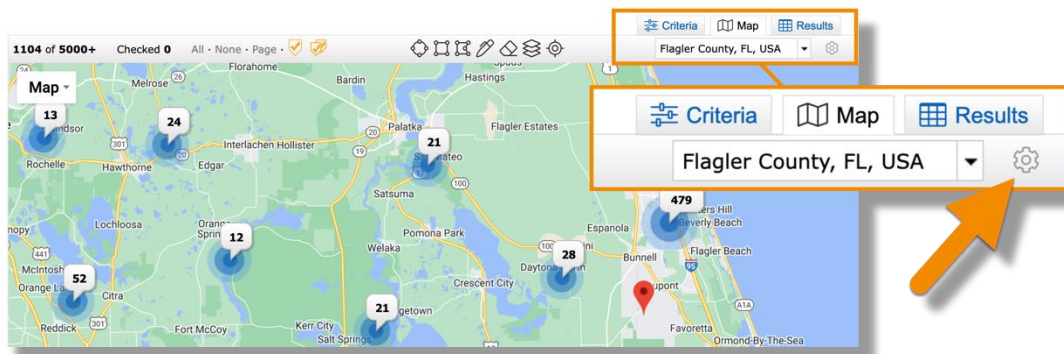

Depending on the text entered, a list of matching locations will appear. In this example, the suggested location of Flagler County, USA was chosen.
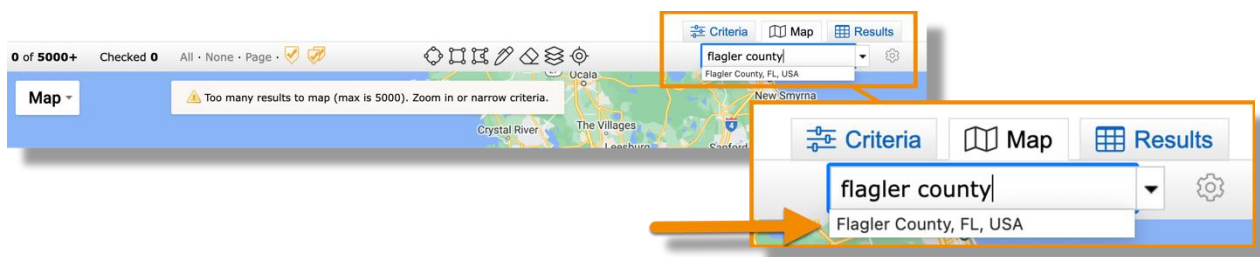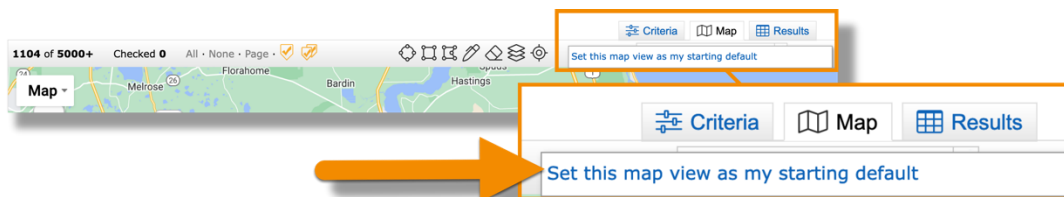

The map display then updates accordingly.
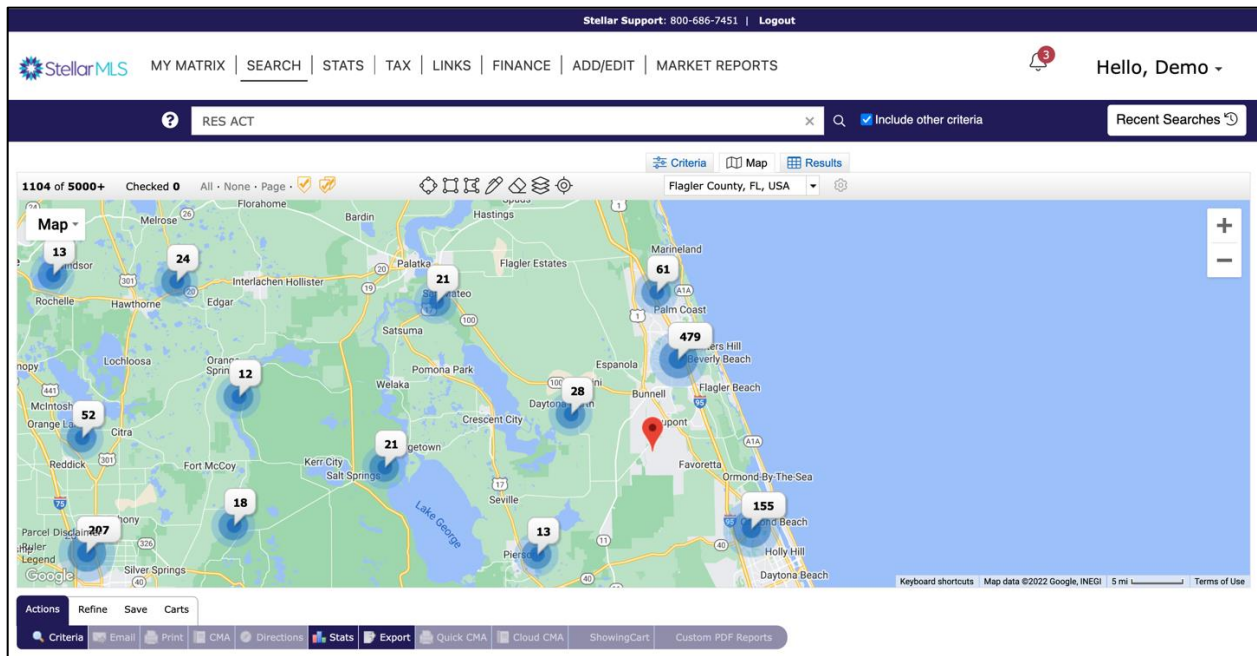
Once the area you would like to set as the default is shown, click the gear icon to the right of the Jump to Address field.

Then, select the option to "Set this map view as my starting default" from the pop-up dialog.

Selecting Neighborhoods on the Map

A powerful feature of Matrix is the ability to display overlays of information on the map without modifying your search criteria or results.

Click the Layers icon in the toolbar above the map to display the list of available categories.

*Tip: Some layers (shown in red text) are not available until you zoom in on the map display*

The Boundaries category is special however -- When certain layers are selected a new toolbar option appears above the map in the shape of a hand.

In this example, the Neighborhood layer was selected and the various neighborhoods are then outlined on the map.

Tip: You may need to zoom in on the map for the neighborhood names to appear.

To select a layer as a shape and include it as part of your search criteria, select the hand tool by clicking it once, then simply click inside of the desired layer.

The layer immediately becomes a selection on the map and refines the number of listings returned!
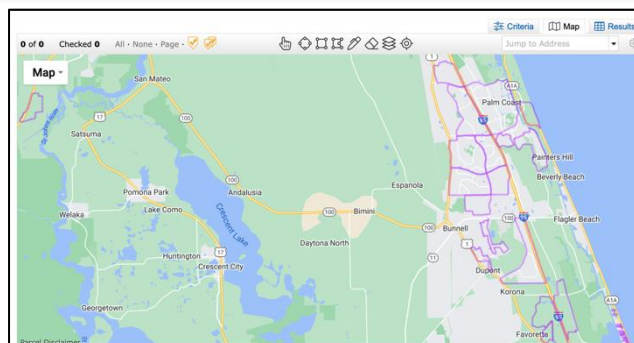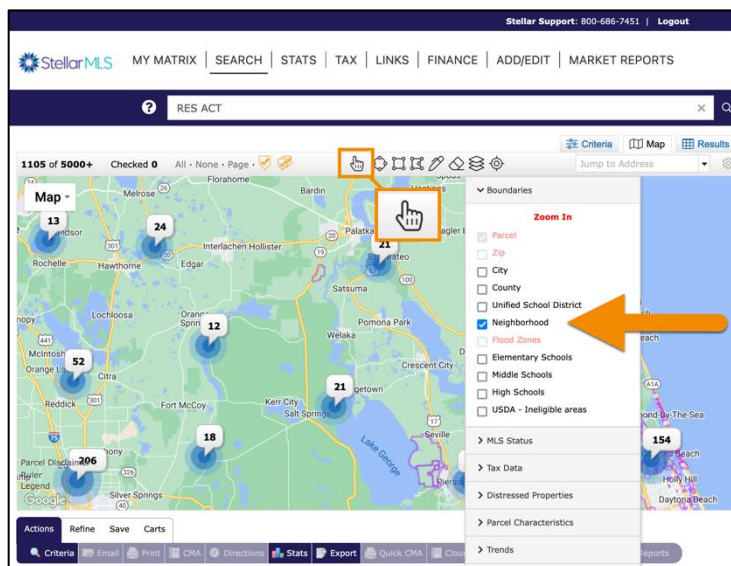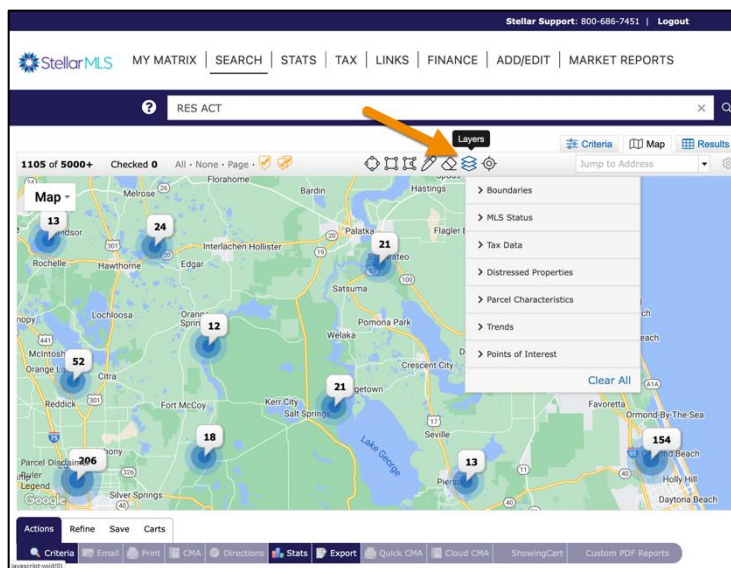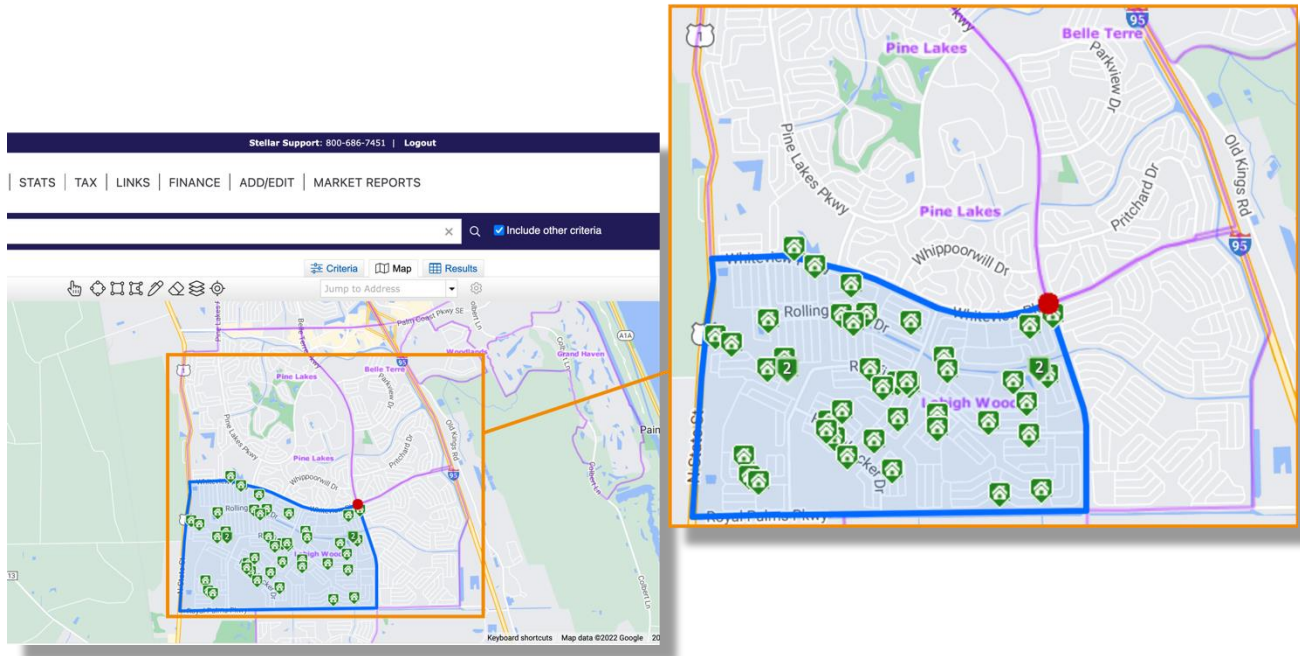
Wildcard Searching

It is possible to search within text-based fields in Matrix such as Street Name, Subdivision, or Public Remarks using what are called wildcards. In Matrix, the wildcard character is an asterisk (*) and is used to represent the unknown. Depending on where the wildcard (asterisk) is placed, Matrix will return different results.

When a search term in enclosed by asterisks (e.g. *term*), Matrix will look for those characters **anywhere** in the field.

For example, in the Legal Subdivision Name field, if the search term entered is *Palm* as shown here:
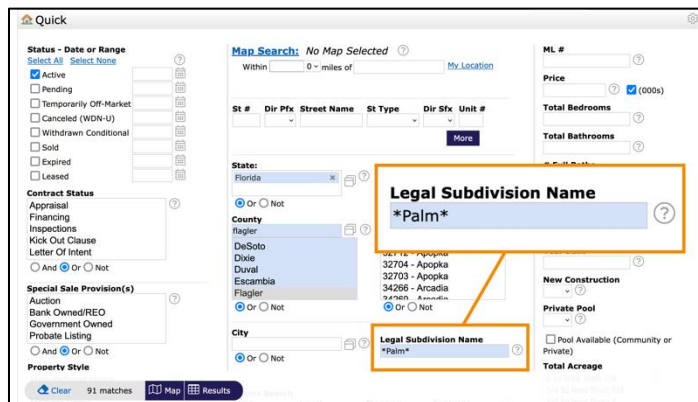
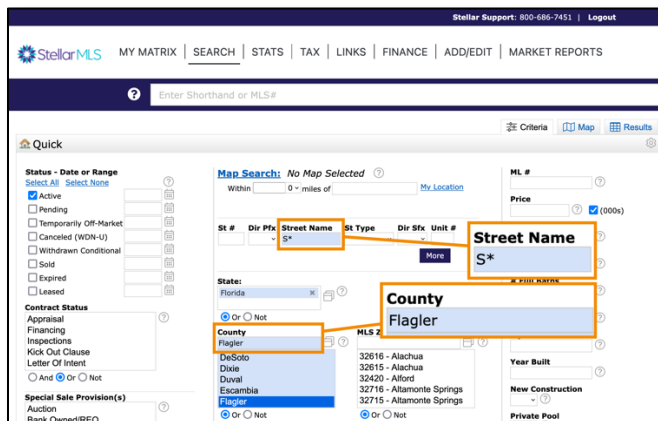Matrix would return any subdivision with the letters p-a-l-m **anywhere** in the name, such as Palm Harbor, Custers Palm Harbor, Palm Coast Bernard Mdws Sec 81, Marina Del Palma, and Ocean Palm.

Legal Subdivision Name

Palm (?)

Using only a single asterisk after the word, such as entering Palm*, would return only those subdivisions **beginning** with Palm such as Palm Harbor, Palm Club Condo, and Palm Coast.

Legal Subdivision Name

Palm* (?)

Likewise, a wildcard search of *Palm would only return those subdivisions **ending** with the word Palm such as Ocean Palm and omit everything else.

Legal Subdivision Name

*Palm (?)

As mentioned previously, the examples above also work for searching text-based fields such as Street Name. Start with an area (such as Flagler county), then simply place S* into the Street Name field to return all matching listings with a street name **beginning** with the letter "S".

Wildcard searching is very powerful and there are additional characters that can be used in combination with asterisks to further refine results and take searching in Matrix text fields to another level. These characters include both exclamation and question marks as well as commas.

Add an exclamation mark (!) to **exclude** a particular term. For example, in the text-based field of Public Remarks, entering the search term !*fixer* would remove any listing in which the characters f-i-x-e-r appear **anywhere** in the field. Moreover, entering !fixer* would exclude public remarks that **began** with the word fixer whereas !*fixer would exclude listings in which the public remarks **end** with the letters f-i-x-e-r.

A question mark (?) can be used as a substitute if a particular character within a term is unknown. For example, *Sm?th* would return matches like "Smith" or "Smyth" whereas *gre?t* would show results containing words such as "great" or "greet".

To combine terms, separate them with a comma (,). Entering *stainless*,*granite* into the Public Remarks field would return those listings in which the public remarks contain **either** term anywhere in the field. Or, entering *stainless*,!*granite* would return listings that contain the word stainless but exclude those containing the word granite in the public remarks.

Removing the comma however indicates to Matrix that the field would need **both** terms for a listing to be shown in the results. So, when searching the Public Remarks field, entering *stainless* *granite* would only return those listings that feature both the words stainless **and** granite anywhere in the field.

Matrix Contacts Module

Access your contacts in Matrix by selecting the My Matrix menu, then Contacts.
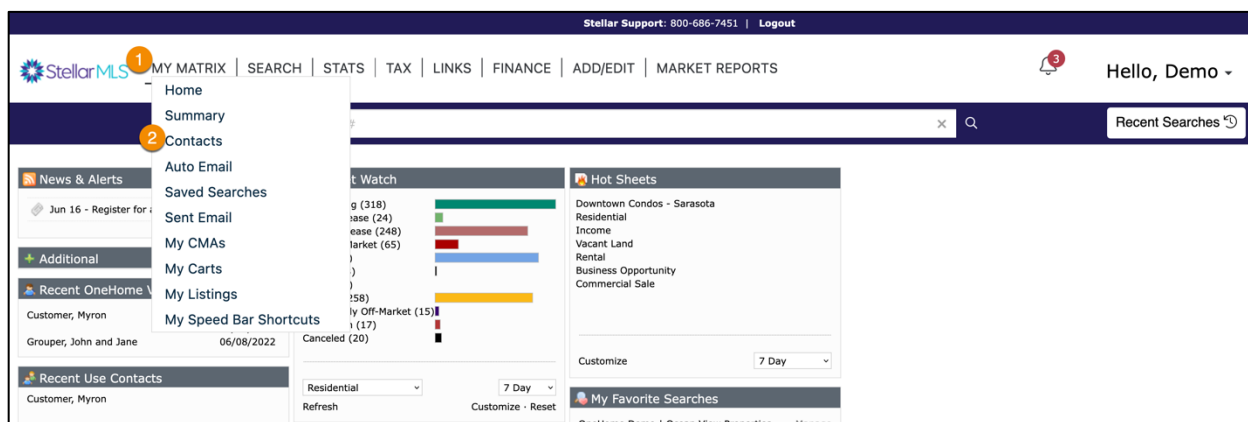
As a reminder, a contact record in Matrix must include three pieces of information: first name, last name, and email address. In Matrix, the unique identifier for a contact record is the email address.

For those contacts created in Navica and then imported into Matrix during the transition period, here is a summary explanation:

Contact Conversions

Sample Contact List

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 on the Sample Contact List, what customers would a member have in the Matrix Contact?

1. Mary Smith, mary@yahoo.com, home phone, 301-555-1212, cell phone 301-555-2323
   - 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

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

In addition, here are some important notes about the conversion process to keep in mind during the transition period:

- Contacts will be updated at the beginning (June 22, 2022) and end (July 26, 2022) of the parallel period between Navica and Matrix.

- If Contacts are edited in Matrix during the parallel period, that contact record 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.

Saving a Search

As demonstrated in the MLS Basic class, Matrix allows a search to be saved after viewing the matching results from either the Map or Results displays. Look below either display once you have entered your desired search criteria, select the Save tab above the button bar, and then choose New Saved Search.
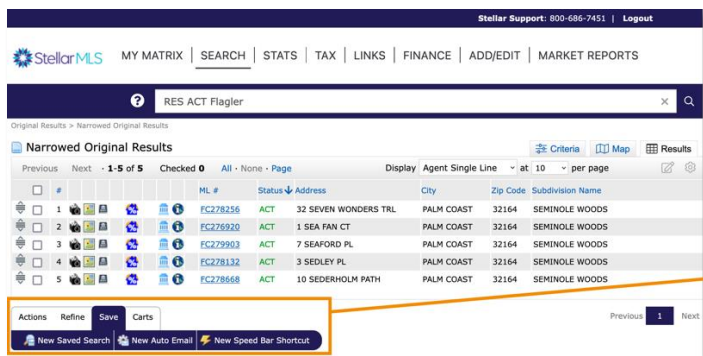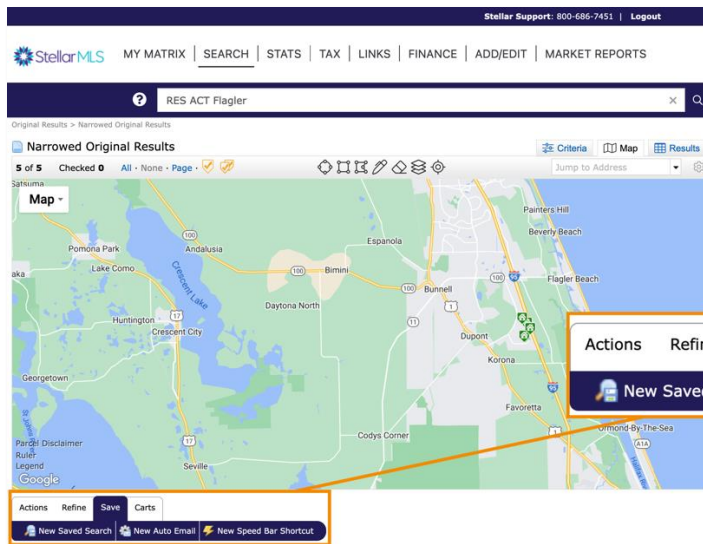
A dialog then opens to name the search (required), assign it to a contact (optional), add the search to the My Favorite Searches widget on the Matrix Home page (up to 10 can be displayed in the widget), as well as review the search criteria.

HELPFUL LINKS

Stellar MLS landing page for Flagler County
Association of REALTORS® members:
https://www.stellarmls.com/fcar

Stellar MLS Rules & Regulations
https://inter.stellarmls.com/display/SRR

Stellar MLS Support Center
https://www.stellarmls.com/about/support

Toll Free: 800-686-7451
Local: 407-960-5300
Email: support@stellarmis.com

Hours:
Monday – Friday: 8:00 am - 6:30 pm
Saturday: 8:00 am - 6:00 pm