

# Optimizing your Matrix Widgets, Result Displays and Exports in to Work Smarter not Harder

## Course Notes

This course is designed to give our customers ways in which they can customize Matrix and its various widgets and displays to work for them. We will recommend ways to customize the system that will benefit the customer and show them ways in which the system can work for them, streamlining the ways in which they access data.

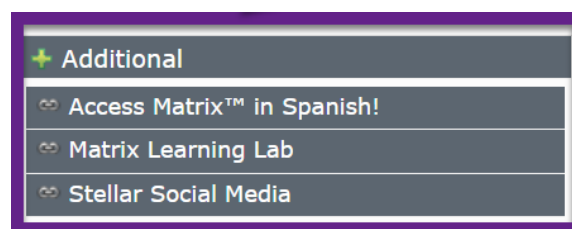
### Widgets

All widgets are displayed on the Matrix homepage when logging into the Matrix system.

Your news and alerts widget is a static menu that remains in the upper left corner of your homepage. This is where you go to get important news and alerts from Stellar MLS.

The screenshot shows the Matrix homepage dashboard. The 'News & Alerts' widget is highlighted with a purple box and a red arrow pointing to a text box on the left. The 'Market Watch' widget is highlighted with a purple box and a red arrow. The 'Hot Sheets' widget is highlighted with a purple box and a red arrow. The 'Contact Requests' widget is highlighted with a purple box and a red arrow. The 'My Stats' widget is highlighted with a purple box and a red arrow. The 'My Favorite Searches' widget is highlighted with a purple box and a red arrow. The 'My Listings' widget is highlighted with a purple box and a red arrow. The 'External Links' widget is highlighted with a purple box and a red arrow.

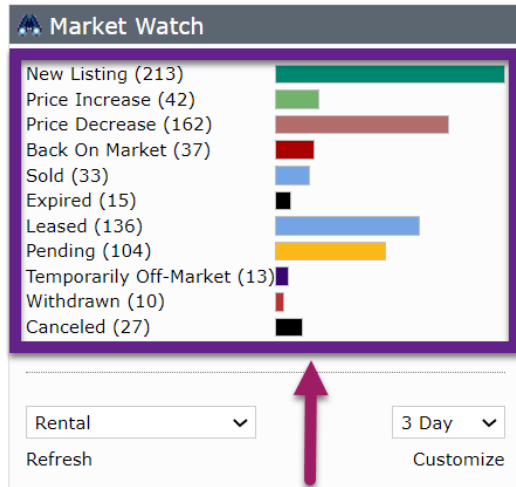
The best part about the home page is that it is completely customizable. You can rearrange the order of the widgets simply by clicking and dragging on the headings for each individual widget. You can also collapse each widget to gain additional space on the homepage and can store unused products into the additional widget.



### Market Watch

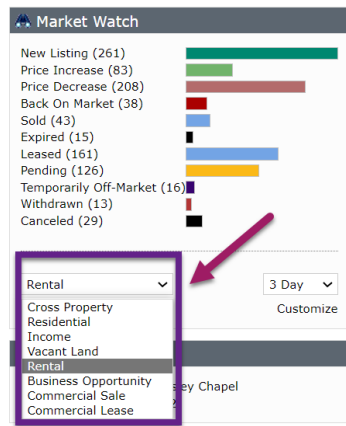
Market Watch is designed to keep you on top of your selected market. We recommend keeping the criteria of the market you are watching broad, allowing you to a bird's eye view of trends and activity.

When accessing Market Watch for the first time, the data that is presented in the widget is information relating to the entire Stellar MLS footprint.



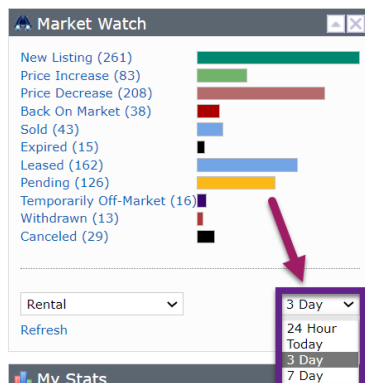
There are various types of data that is reported in the Market Watch widget. You can keep track of new listings, price decreases, temporarily off-market properties, and so many other statuses within the industry.

You are also able to customize each of the property classifications that relate to your real estate business. You can access the property classifications in the bottom left corner of the Market Watch widget.



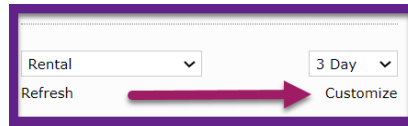
Although all the property classifications are available, it is not necessary to customize all of them. It is also important to note that the customizations that are made for one classification does not transfer to the others. You will need to go into each classification you want to monitor and customize it individually.

In the bottom right corner of the widget, you will notice an additional dropdown menu. This menu will allow you to adjust the timeframe in which the data is being pulled for.

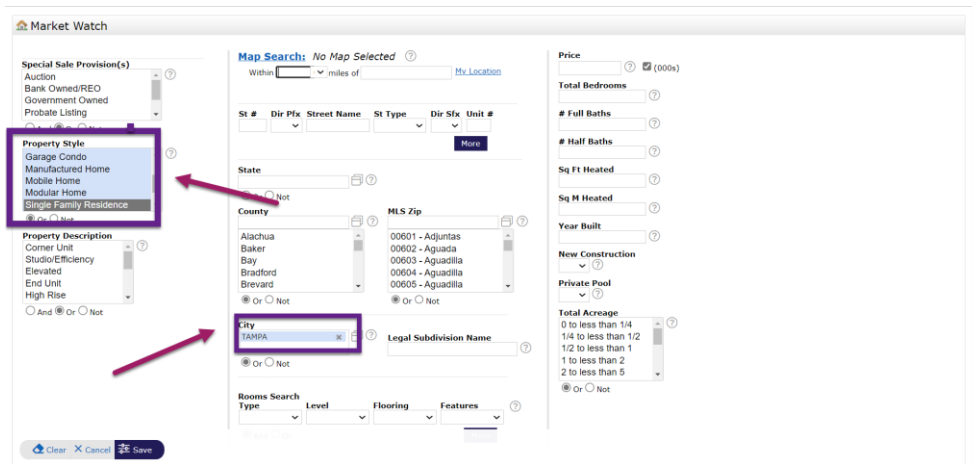


This feature allows you to easily toggle between various timeframes to access data for a specified market. Once you customize the property classifications, getting different views of the market is a breeze.

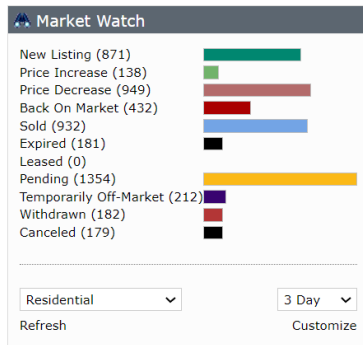
When you are ready to customize a particular property classification, you can access this option underneath the timeframe menu in the bottom right corner of the Market Watch widget.



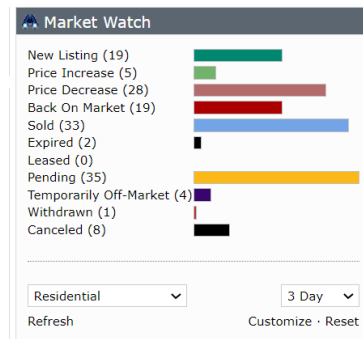
In order to complete the customization process, you will select the property classification you wish to customize from the drop-down menu and select the customize link in the bottom left corner of the widget. This will take you to the customization form, allowing you to select the desired criteria for that property classification.



Once you have selected the desired criteria, you will simply lock in your choices using the save button in the bottom left corner of the page. When you return to the Market Watch widget, you will notice that the data being presented has adjusted based off the criteria that was saved during the customization of that classification.



The image on the left shows the Market Watch data prior to customization, which shows the data for the entire Stellar MLS coverage area. The image on the right shows the data displayed in the Market Watch widget after the Residential classification was customized.



To customize other property classifications, simply select the appropriate classification and repeat the customization process for each individual classification you would like to keep your eye on. Once you have customized all the classifications you wish to watch, you can simply toggle through the data using the property classifications drop-down menu.

## Setting Search Defaults using the Search Form

Setting search defaults within Matrix is a great way to save time when you are working in a particular area. You can set the defaults using any of the search criteria available on the property classification search form. It is important to note that it is necessary to set your defaults separately to each property classification search form that you wish to have them set to. The set defaults do not transfer from one search form to the other.

To set selected criteria as your starting default, you will first want to select the type of search form you would like to use. After selecting the criteria you would like to set as your starting defaults, you will use the gear icon located in the upper right corner of the search form found under the results tab.

The screenshot shows a search form titled "Search run Friday, 11:36 AM". The form is divided into several sections:

- Status - Date or Range:** Includes checkboxes for Active, Pending, Temporarily Off-Market, Canceled (WDN-U), Withdrawn Conditional, Sold, Expired, and Leased.
- Contract Status:** Includes checkboxes for Appraisal, Financing, Inspections, Kick Out Clause, Letter Of Intent, and Special Sale Provision(s).
- Property Style:** A dropdown menu with options: 1/2 Duplex, Condo - Hotel, Condominium, Dock-Rackominium, and Farm.
- Map Search:** Includes fields for "Within" (miles of) and "My Location".
- St #, Dir Pfx, Street Name, St Type, Dir Sfx, Unit #:** Fields for address information.
- State:** A dropdown menu set to "Florida".
- County:** A dropdown menu with options: Alachua, Baker, Bay, Bradford, Brevard.
- MLS Zip:** A dropdown menu with options: 34236, 33705 - St Pete, 33716 - St Pete, 33710 - St Pete/Crossroad, 33704 - St Pete/Euclid, 33737 - St Pete/Gulfport.
- City:** A dropdown menu.
- Legal Subdivision Name:** A dropdown menu.
- Rooms Search:** Includes dropdowns for Type, Level, Flooring, and Features.
- Price:** A field with a value of "750-950" and a "(000s)" indicator.
- Total Bedrooms, Total Bathrooms, # Full Baths, # Half Baths, Sq Ft Heated, Sq M Heated, Year Built, New Construction, Private Pool, Total Acreage:** Various search criteria fields.

A red arrow points to a gear icon in the top right corner of the search form.

Once you select the gear icon, you will choose the option that states, "set currently selected search criteria as my starting default." This will lock in the currently selected criteria as your starting search defaults each time you begin a new search using that search form.

The screenshot shows the search form interface with a red arrow pointing to a gear icon in the top right corner. A dropdown menu is open, showing two options:

- Set currently selected search criteria as my starting default
- Reset to the system Search defaults

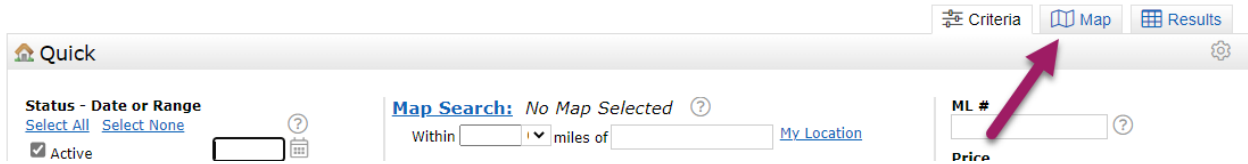
At any time, you can reset back to the system default settings. You will select the same gear icon and choose the option that states, "Reset to the system Search defaults." This will revert to the original search defaults.

The screenshot shows the search form interface with a red arrow pointing to a gear icon in the top right corner. A dropdown menu is open, showing two options:

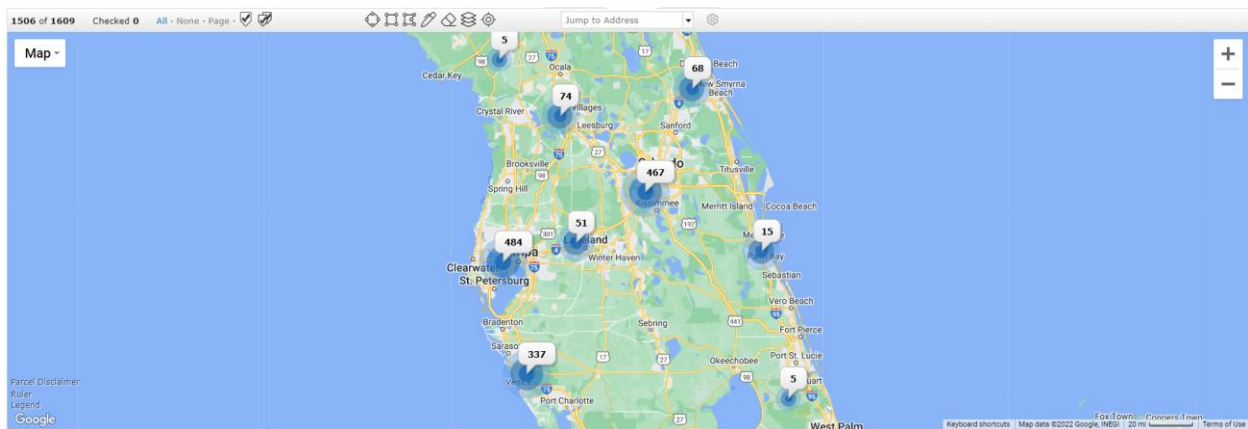
- Set currently selected search criteria as my starting default
- Reset to the system Search defaults

## Setting Search Defaults using the Interactive Map

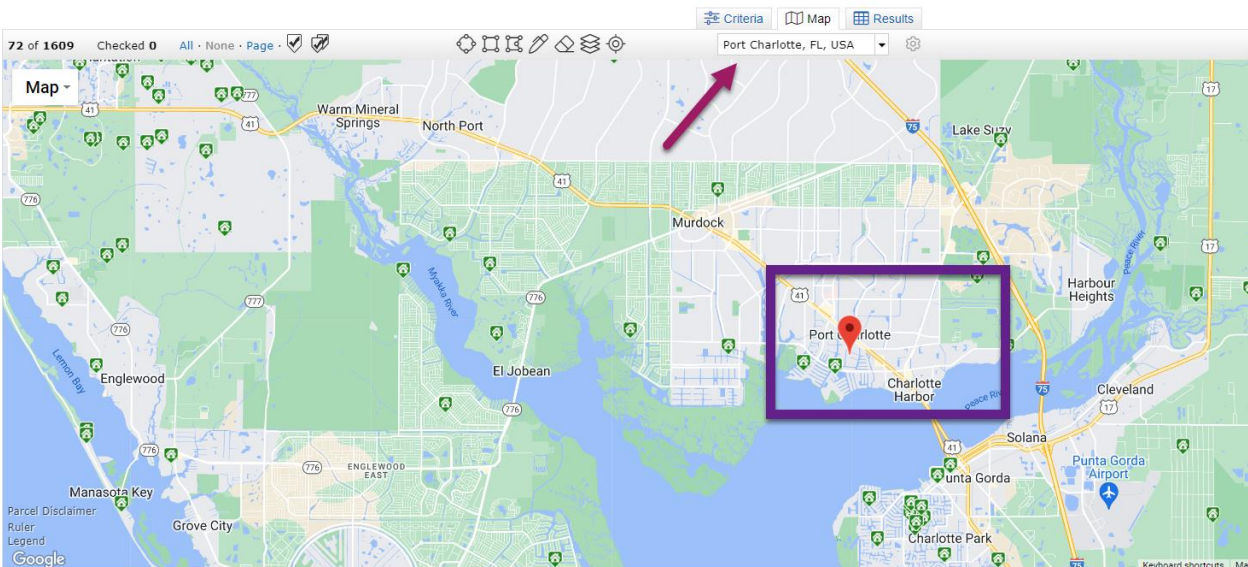
Setting your search defaults can also be accomplished using the Interactive Map. Once you have determined what criteria you want to select for your search, it's as easy as setting a specific map view when viewing results. You will first want to add the criteria to your search form that matches what you are looking for without adding in a specific location. You will then access the Map tab along the top right side of your search form.



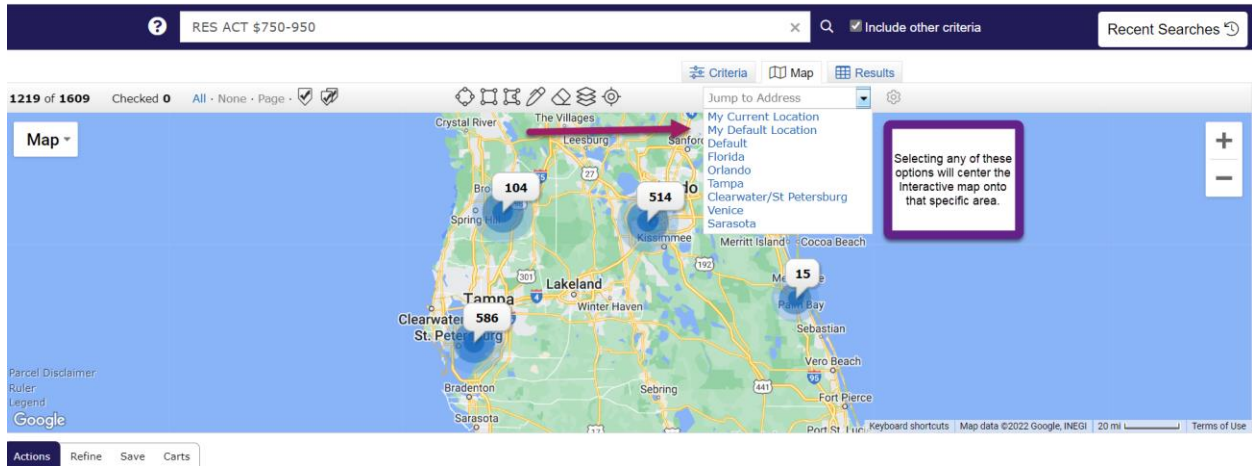
When opening to the map tab without selecting a specific area, the map will populate to the entire Stellar MLS coverage area.



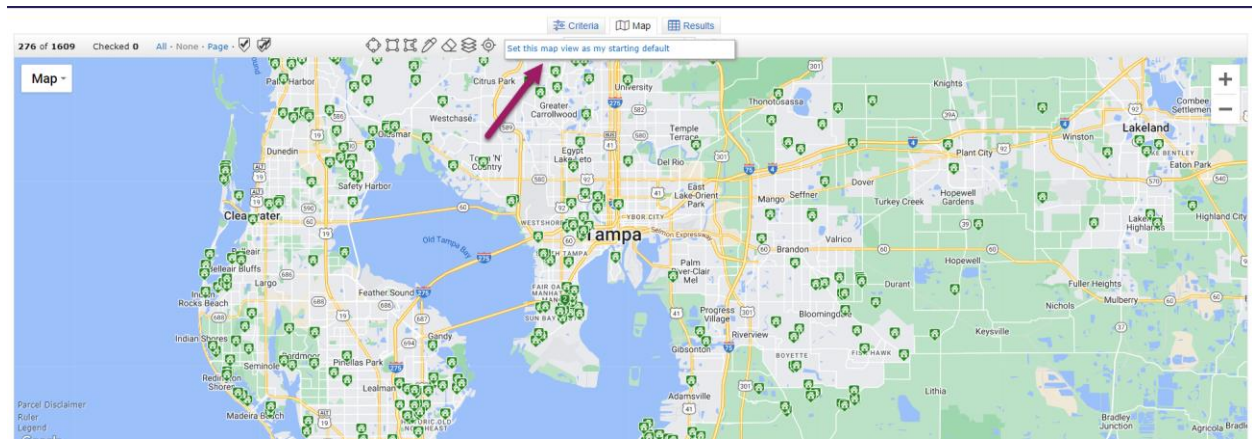
To select a particular area, use the Jump to Address function. You can select a desired search area in two different ways. First, you can type in a specific address into the Jump to Address search bar. This will place a location marker onto the interactive map for that chosen location.



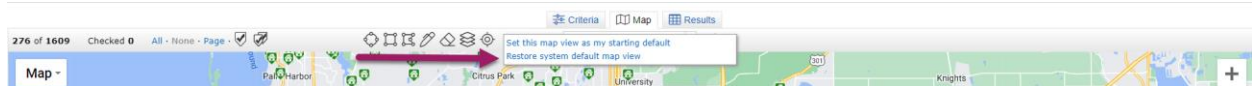
Another option when selecting your desired area is to use the drop-down menu and choose an option from there. You can select your current location, a preset default location, and from a variety of predetermined areas within the Stellar MLS coverage area.



Once the area you wish to select as your default is being shown on the map, select the gear icon located under the results tab next to the Jump to Address search bar. The option to set the current map view as your starting default.



Returning to the system defaults is simple. Return back to the gear icon located next to the Jump to Address search bar and select restore system default map view.

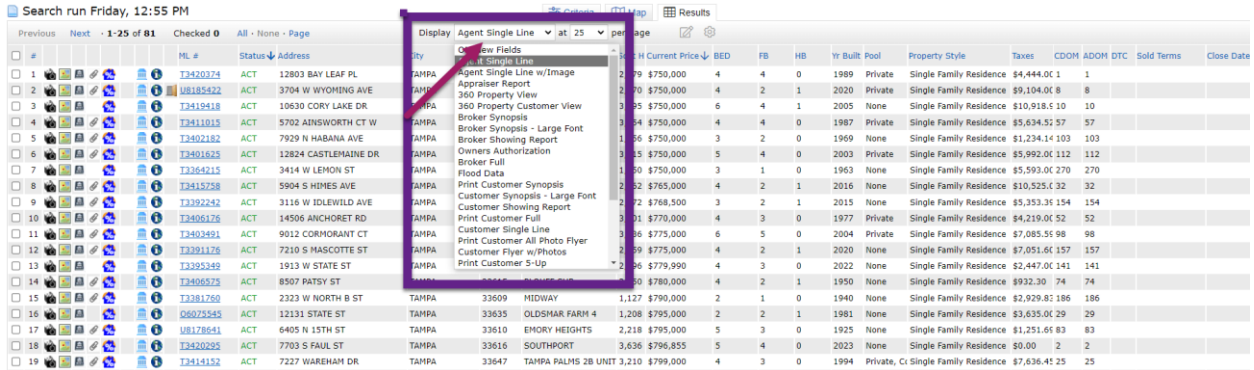


Please note: if you wish to set defaults settings using the Interactive Map, be sure to set the defaults when using different types of search forms. The defaults do not transfer from one type of search form to the other.

## Setting Custom Displays in the Matrix Results View

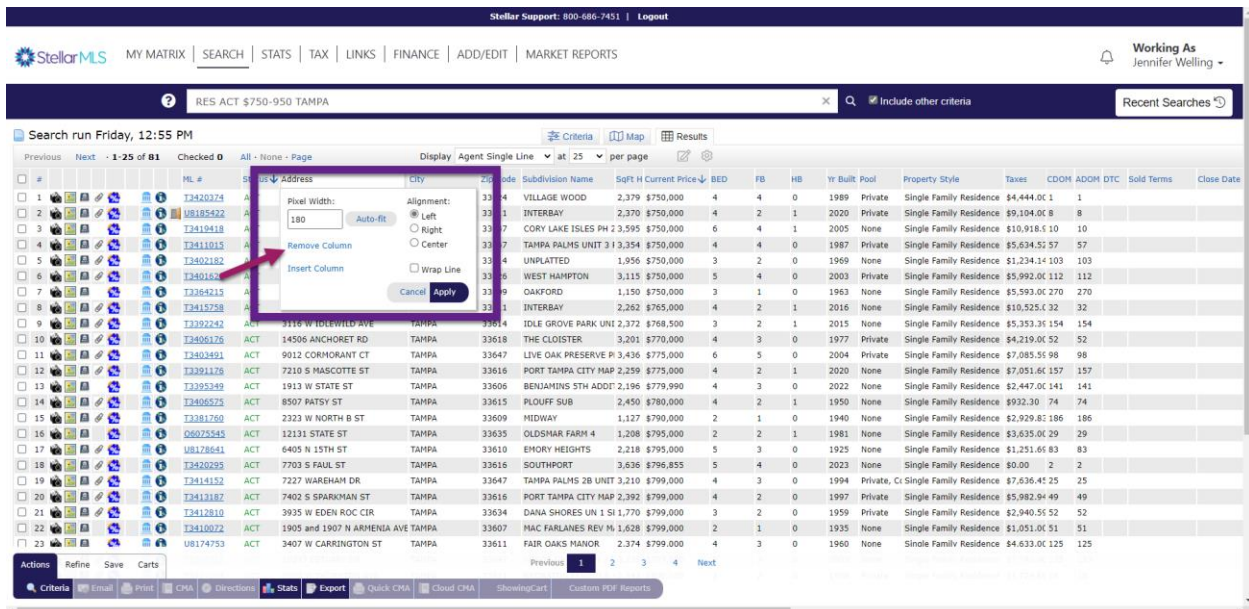
Setting custom displays is a great way to see specific criteria in a single glance when viewing search results. There are several ways in which you can adjust the view that you see in your results displays.

The first way in which you can customize your results view is by selecting a predetermined view from the drop-down menu. This can be found at the top of the results display in the center of the top toolbar.



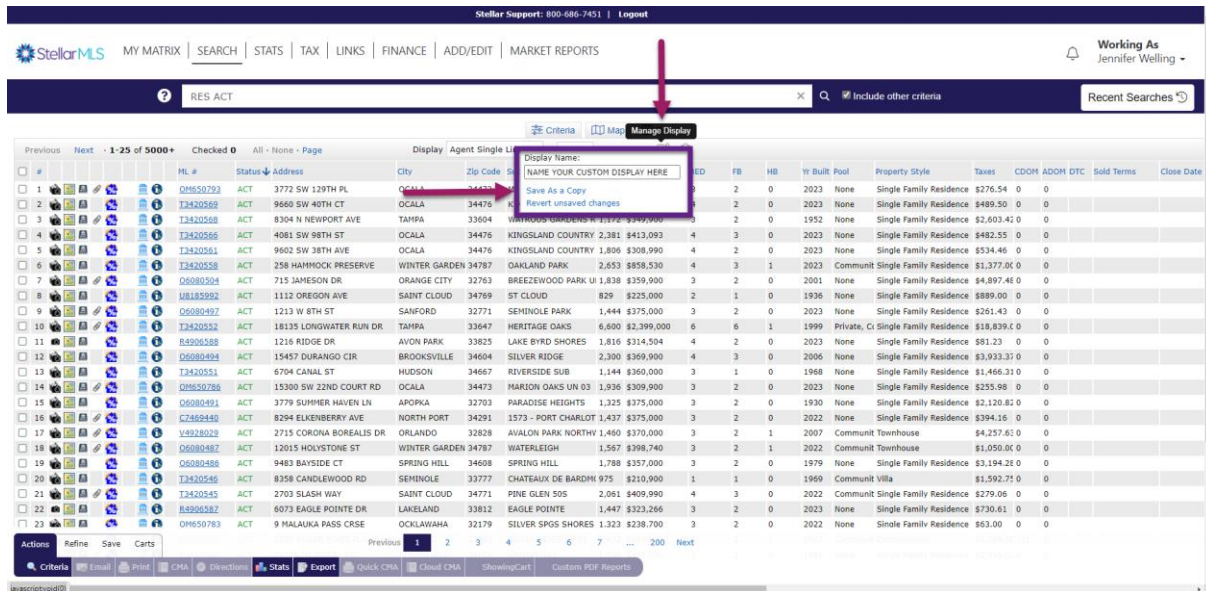
The screenshot shows a search results page with a table of properties. A dropdown menu is open over the 'Display Agent Single Line' column header. The menu options include: 'Agent Single Line w/Image', 'Appraiser Report', '360 Property View', '360 Property Customer View', 'Broker Synopsis', 'Broker Synopsis - Large Font', 'Broker Showing Report', 'Owners Authorization', 'Broker Full', 'Flood Data', 'Print Customer Synopsis', 'Customer Synopsis - Large Font', 'Customer Showing Report', 'Print Customer Full', 'Customer Single Line', 'Print Customer All Photo Flyer', 'Customer Flyer w/Photos', 'Print Customer S-Up', and 'Print Customer S-Down'. A red arrow points to the 'Agent Single Line w/Image' option.

You can also set your own custom displays within the Agent Single Line display view. You can do many things to suit the types of searches you may conduct within Matrix. One way the view can be customized is by the removal of columns that are unneeded or unwanted. The process is quite simple. You will take your cursor to the top of any of the columns where the column headings are listed. Your cursor will turn into a cross with arrows on the ends. Once the cursor has changed, you will left click your mouse, opening the edit menu. From here you can remove columns you find unnecessary for your results display.



The screenshot shows the same search results page. A context menu is open over the 'Sqft' column header. The menu options include: 'Pixel Width: 180', 'Alignment: Left', 'Right', and 'Center', 'Remove Column', 'Insert Column', and 'Wrap Line'. A red arrow points to the 'Remove Column' option.

Not only do you can remove columns, but you can also create custom displays by adding additional columns that can be helpful to your search results. Let's walk through the steps of creating a custom display from the beginning. You will first want to select the type of search that you are wanting to conduct i.e. residential, rental, income, etc. Before adding any search criteria, you will want to go to the results tab and name your custom display. You will select the Manage Display icon, found under the result tab, rename the display by typing the name in the field provided, and then saving the display as a copy.



Once you have named your custom display, you can return to the criteria tab and begin to enter in the specific criteria for your search. After adding all the criteria to your search, return to the results tab. This is where you can further customize the data that is available for this custom display. Let's look at some examples to provide you with practice on creating these usual tools.

### First Example: Condos

To begin the example, the custom display has already been named, "CONDOS: Fees and Features" and has been saved as a copy. Criteria has been placed into the residential quick search form including Property Style (condominium), Zip Code (34236), and Price Range (\$750-950K). Return to the results tab and beginning removing any unnecessary columns for the display window. Next, add the columns to the results display that will be beneficial when searching these types of properties. The process is the same as removing a column except you will select insert column rather than remove column. This will allow you to ability to select from all the various criteria fields within Matrix. To rearrange the columns once they have been added, simply clicked onto the heading and drag the column into the position you would like it to be viewed. You can add as many new columns as you wish to reflect the information that you find helpful for the type of listings you are searching for.



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RES ACT \$750-950 34236

Criteria Map Results

Previous Next 1-11 of 11 Checked 0 All - None - Page Agent Single Line display Display my:NAME YOUR CL v at 25 per page

#	ML #	Status	Address	City	ID Code	Subdivision Name	SqFt	H	Current Price	BED	FB	HB	Yr Built	Pool	Property Style	Taxes	CDOM	ADOM	DTC	Sold Terms	CL
1	A4555368	ACT			4236	BAYS BLUFF ATPS SEC	1,195		\$750,000	2	2	0	1971	Communit	Condominium	\$6,347.00	9				
2	A4539875	ACT			4236	332 COCOANUT	992		\$750,000	2	1	0	2021	Communit	Condominium	\$0.00	190	190			
3	N6121214	ACT			4236	332 COCOANUT	992		\$778,000	1	1	0	1981	Communit	Condominium	\$11,950.51	1,075	232			
4	A4552809	ACT			4236	LIDO TOWERS	1,293		\$795,000	2	2	0	1980	Communit	Condominium	\$5,485.78	42				
5	A4525407	ACT			4236	COLLAGE ON 5TH	1,150		\$795,000	2	2	0	2023	None	Condominium	\$7,428.22	212	212			
6	A4555203	ACT			4236	ROYAL ST ANDREW	1,485		\$815,000	2	2	0	1969	Communit	Condominium	\$9,342.00	8	8			
7	A4540588	ACT			4236	VILLA BALLADA	1,057		\$840,000	2	2	0	2023	Communit	Condominium	\$8,400.00	184	184			
8	A4533088	ACT			4236	PIER 550	641		\$850,000	2	2	0	1948	Communit	Condominium	\$3,218.00	39	39			
9	A4543038	ACT			4236	CITYSCAPE AT COURTH	2,767		\$998,000	4	3	1	2005	None	Condominium	\$8,430.33	60	60			
10	A4552968	ACT			4236	EMBASSY HOUSE	1,272		\$900,000	2	2	0	1975	Communit	Condominium	\$7,045.67	38	38			
11	A4543324	ACT			4236	VILLA BALLADA	1,153		\$945,000	2	2	1	2023	None	Condominium	\$9,500.00	64	64			

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Suggested columns to add for this type of listing might include condo fees, condo fee schedule, HOA fee, HOA fee schedule, floor number, building elevator Y/N, and Pets Allowed Y/N.

To lock in the changes for the custom display you created, you will return to the Manage Display menu and select "Save Changes." This will immediately lock in the changes that you made under that custom display. This custom display will not be available for you to use. You can access all your custom displays in the drop-down menu towards the middle of the page.

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REN ACT 3+ ZEPHYRHILLS

Search run Wednesday, 4:04 PM

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Display Agent Single Line v at 25 per page

#	ML #	Status	County	Rent Price	Address	Display	Agent Single Line	SqFt	Yr Built	Pool	Pets Allowed	Rental Rate Ty
1	T3418879	ACT	Pasco	\$1,600	5303 6TH ST	my:NAME YOUR CUSTOM DISPLAY HERE	Agent Single Line					
2	T3416906	ACT	Pasco	\$1,800	7551 JENO S	Weeks and Months Available	Agent Single Line					
3	T3419122	ACT	Pasco	\$1,895	38600 ALSTO	OM New Fields	Agent Single Line w/ Image					
4	T3410648	ACT	Pasco	\$1,930	7523 JENO S	Appraiser Report	Appraiser Report					
5	T3417359	ACT	Pasco	\$1,950	5208 HILL D	360 Property View	360 Property Customer View					
6	T3417591	ACT	Pasco	\$2,060	6413 ASHVIL	Broker Synopsis	Broker Synopsis					
7	T3416001	ACT	Pasco	\$2,150	3537 ZEPHYR	Broker Showing Report	Broker Showing Report					
8	T3419253	ACT	Pasco	\$2,185	5446 PASSING	Owners Authorization	Broker Full					
9	T3420726	ACT	Pasco	\$2,195	7172 TWISTE	Flood Data	Flood Data					
10	T3418202	ACT	Pasco	\$2,200	6527 BAYSTO	Print Customer Synopsis	Print Customer Synopsis					
11	T3415972	ACT	Pasco	\$2,200	4639 WESLE	Customer Synopsis - Large Font	Customer Showing Report					
12	T3417813	ACT	Pasco	\$2,295	2947 AUTUM	Customer Showing Report	Print Customer Full					
13	T3406487	ACT	Pasco	\$2,325	6628 BAYSTO	Print Customer Full	Customer Single Line					
14	T3408794	ACT	Pasco	\$2,395	6043 MERRI	Customer Single Line	Print Customer All Photo Flyer					

Actions Refine Save Carts Criteria Email Print CMA Directions Stats Export Quick CMA Cloud CMA ShowingCart Custom PDF Reports

To select the custom display you would like to use, simply click onto the title of the display you wish you use and the preset options will populate in your display and provide the data you are wanting.

## Single Family Home Example

To provide an additional look at creating custom displays, let's look at a single-family residence display.

To begin the process, start a new residential quick search and before entering any criteria, move to the results display and select the Manage Display icon. You will rename the custom display as SFR: Ext. Features, Pool View, HOA. Once the display is renamed, return to the criteria tab to enter the specific criteria for your search. Below are the criteria being added for this example.

- Property Type: Single-Family Residence
- City: Tampa
- Price: \$750-950

Once the criteria are entered, return to the results tab to begin the customization of the results display for this custom display. Removing extraneous information from the results display will assist in reporting only the pertinent information needed for your customer to make decisions on the listed properties. Just as before, once the unwanted columns are removed, adding the relevant criteria is the next step. Let's add an additional layer to adding those new columns by introducing pixel width adjustment and wrap text to the adding process. Following the previously discussed process, go to the heading area and left click to add a new column, search for Exterior Features and select apply. Once the new column has been added to the display, there are some adjustments that will need to be made to this criteria field to view the data within the field. Adjusting the pixel width and adding wrap text to the cell will allow you the ability to view all the text without having to scroll through the data. Select the Exterior Features heading from the title bar. Once the pop-up window appears, select the action checkbox to the left of wrap text and adjust the pixel width to 100.

The screenshot shows the Stellar MLS interface with a search for 'RES ACT \$750-950 TAMPA'. A table of results is displayed with columns for #, ML #, Status, Address, and City. A pop-up window titled 'Exterior Features' is open, allowing for column customization. The 'Pixel Width' is set to 100, and the 'Wrap Line' checkbox is checked. The table data includes:

#	ML #	Status	Address	City
1	U8185422	ACT	3704 W WYOMING AVE	TAMPA
2	T3419418	ACT	10630 CORY LAKE DR	TAMPA
3	T3413187	ACT	7402 S SPARKMAN ST	TAMPA
4	T3411015	ACT	5702 AINSWORTH C W	TAMPA
5	T3402182	ACT	7929 N HABAN AVE	TAMPA
6	T3401625	ACT	12824 CASTLEMAINE DR	TAMPA
7	T3364215	ACT	3414 W LEMON ST	TAMPA
			3116 W	

This will adjust the cell and allow you a better view of the data available for that field.

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RES ACT \$750-950 TAMPA Include other criteria Recent Searches

Criteria Map Results

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#	ML #	Status	Address	Exterior Features	City	Zip Code	Subdivision Name	SqFt H	Current Price	BED	FB	HB	Yr Built
1	U8185422	ACT	3704 W WYOMING AVE	Fenced, Lighting, Private Mailbox, Rain Gutters, Sliding Doors	TAMPA	33611	INTERBAY	2,370	\$750,000	4	2	1	2020
2	T3419418	ACT	10630 CORY LAKE DR	Balcony, Other, Sidewalk	TAMPA	33647	CORY LAKE ISLES PH 2	3,595	\$750,000	6	4	1	2005
3	T3413187	ACT	7402 S SPARKMAN ST	Fenced, Outdoor Grill, Outdoor Kitchen, Private Mailbox, Sliding Doors	TAMPA	33616	PORT TAMPA CITY MAP 2,392	2,392	\$750,000	4	2	0	1997
4	T3411015	ACT	5702 AINSWORTH CT W	Fenced, Rain Gutters, Sidewalk, Sliding Doors	TAMPA	33647	TAMPA PALMS UNIT 3 f	3,354	\$750,000	4	4	0	1987

Actions Refine Save Carts

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

Continue to add additional criteria fields. Below are the criteria being added as an example.

- Private Pool Y/N
- View-adjust the Pixel width to 100 and wrap text
- HOA Comm Assn Y/N

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RES ACT \$750-950 TAMPA Include other criteria Recent Searches

Criteria Map Results

Previous Next 1-25 of 79 Checked 0 All None Page Display Agent Single Line at 25 per page

#	ML #	Status	Address	Exterior Features	Pool Private Y/N	View	HOA Y/N	City	Zip Code	Subdivision Name	SqFt H	Current Price
1	U8185422	ACT	3704 W WYOMING AVE	Fenced, Lighting, Private Mailbox, Rain Gutters, Sliding Doors	Yes		No	MPA	33611	INTERBAY	2,370	\$750,000
2	T3419418	ACT	10630 CORY LAKE DR	Balcony, Other, Sidewalk	No	Trees/Woods	Yes	MPA	33647	CORY LAKE ISLES PH 2	3,595	\$750,000
3	T3413187	ACT	7402 S SPARKMAN ST	Fenced, Outdoor Grill, Outdoor Kitchen, Private Mailbox, Sliding Doors	Yes		No	MPA	33616	PORT TAMPA CITY MAP 2,392	2,392	\$750,000
4	T3411015	ACT	5702 AINSWORTH CT W	Fenced, Rain Gutters, Sidewalk, Sliding Doors	Yes	Trees/Woods	Yes	MPA	33647	TAMPA PALMS UNIT 3 f	3,354	\$750,000

Actions Refine Save Carts

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

Once those fields are added, lock in your changes to the custom display by selecting the Manage Display icon and saving the changes.

### New Construction Example-Advanced

The last example will take what we have learned and apply it to multiple cells as we add them to this custom display.

To begin the process, start a new residential quick search and before entering any criteria, move to the results display and select the Manage Display icon. You will rename the custom display as New Construction. Once the display is renamed, return to the criteria tab to enter the specific criteria for your search. Below are the criteria being added for this example.

- Single-Family Residence
- City: Port Charlotte
- Price: \$650-850
- New Construction: YES

Once the criteria are entered, return to the results tab to begin the customization of the results display for this custom display. Just as before, once the unwanted columns are removed, adding the relevant criteria is the next step. Following the previously discussed process, apply the following to each of the newly added fields.

- Add Property Condition
- Add Floor Coverings: adjust pixel width to 100 and add wrap text
- Add Additional Rooms: adjust pixel width to 150 and add wrap text
- Add Community Features: adjust pixel width to 175 and add wrap text

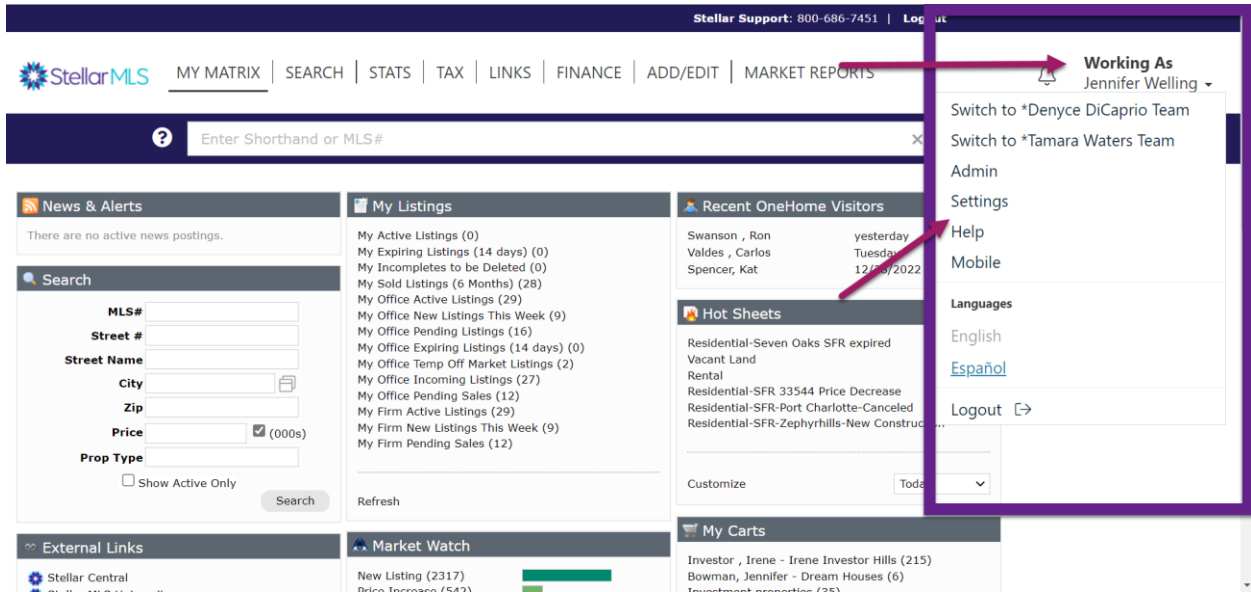
The screenshot shows a search results page with the following search criteria: RES ACT \$650-850 PORT CHARLOTTE. The results are displayed in a table with the following columns: #, ML #, Status, Property Condition, Floor Covering, Additional Rooms, Community Features, Address, City, and Zip. The table contains 11 rows of property listings. A purple box highlights the columns: Property Condition, Floor Covering, Additional Rooms, and Community Features.

#	ML #	Status	Property Condition	Floor Covering	Additional Rooms	Community Features	Address	City	Zip
1	N6123093	ACT	Under Construction	Ceramic Tile, Porcelain Tile			4464 FORT MYERS AVE	PORT CHARLOTTE 33	
2	C7454761	ACT	Under Construction	Ceramic Tile	Breakfast Room Separate, Great Room, Inside Utility	Community Boat Ramp, Deed Restrictions, Fishing, Park, Playground	170 MIGUE CIR	PORT CHARLOTTE 33	
3	N6123877	ACT	Under Construction	Ceramic Tile, Laminate			3429 MARKHAM AVE	PORT CHARLOTTE 33	
4	D6128378	ACT	Under Construction	Tile		Deed Restrictions	0404 MONTICELLO DR	PORT CHARLOTTE 33	
5	D6123416	ACT	Pre-Construction	Porcelain Tile			5546 STUART CIR	PORT CHARLOTTE 33	
6	D6127226	ACT	Under Construction	Ceramic Tile		Community Boat Ramp, Deed Restrictions, Park, Sidewalk, Water Access, Waterfront	0486 ATENIA ST	PORT CHARLOTTE 33	
7	C7462339	ACT	Pre-Construction	Tile			494 HORACE CIR	PORT CHARLOTTE 33	
8	D6122906	ACT	Under Construction	Ceramic Tile, Porcelain Tile			4070 FORT MYERS AVE	PORT CHARLOTTE 33	
9	C7468360	ACT	Completed	Porcelain Tile			435 MONTEGO LN	PORT CHARLOTTE 33	
10	D6127217	ACT	Under Construction	Carpet, Vinyl	Den/Library/Office		5384 HENNIPEN CIR	PORT CHARLOTTE 33	
11	C7461049	ACT	Pre-Construction	Tile			3112 WINDCREST DR	PORT CHARLOTTE 33	

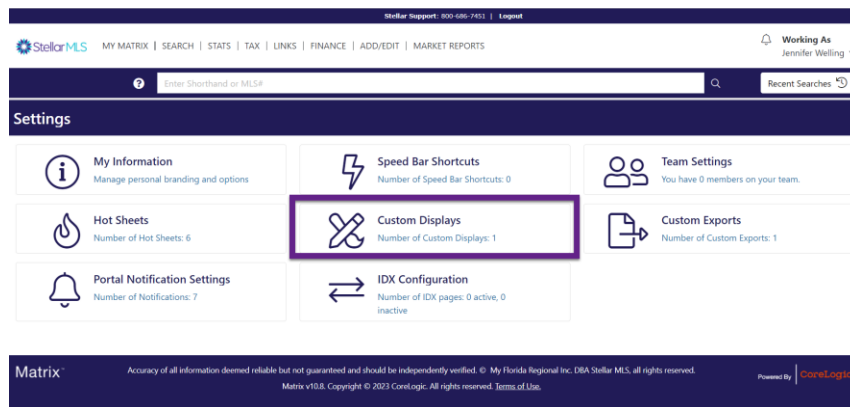
Once those fields are added, lock in your changes to the custom display by selecting the Manage Display icon and saving the changes.

### Custom Displays in Utility Menu

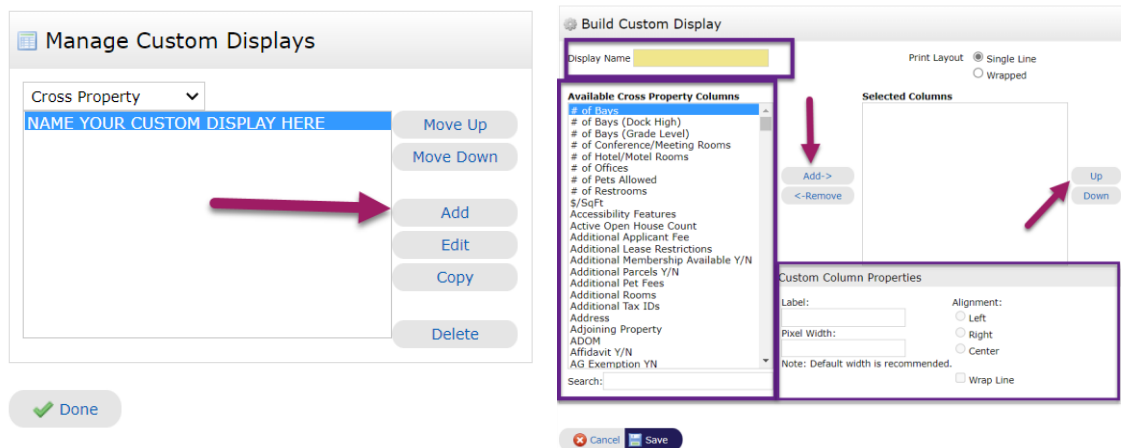
You can also create custom displays from scratch from your Matrix Customer Portal. To do this, return to the main Matrix homepage. You will access the Utility Menu in the upper right corner and launch into the Settings menu.



From here, access the Custom Displays menu.



From here, selecting the add button will open the options available to create your own custom display.



Below are the steps outlined when creating a new custom display.

- Name the display: i.e. Rentals
- Select the various criteria and use the add button to add desired criteria columns
  - Lease Price, Lease Term, Pets Allowed Y/N
- Use Custom Column Properties to adjust Pixel Width, Alignment, and Wrap Text

\*\*It is important to note that if you do not add the column, it will not be displayed in the results view. For example, when creating a custom display from scratch, if you do not add in the column for the MLS ID#, it will not be displayed. You will want to be thorough in the customization process here.

Once the desired selections are made, lock in the choices by selecting the Save button in the bottom left corner.

## Custom Exports

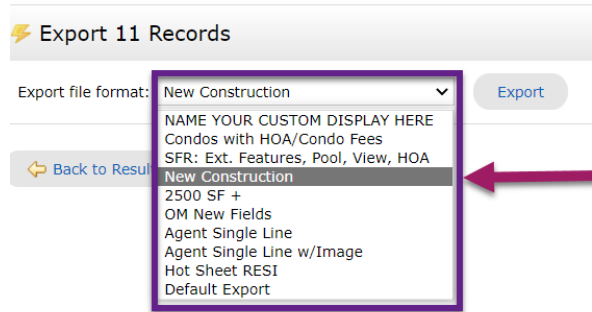
Custom Exports can be used when exporting results information from Matrix into Excel spreadsheets. They can be very helpful when providing detailed information about multiple properties to your customers on a single document.

To begin the process, access any recent search from the Recent Searches menu on the Matrix homepage. Once on results page, select the listings you wish to export and select the export option in the Actions menu below the displayed results.

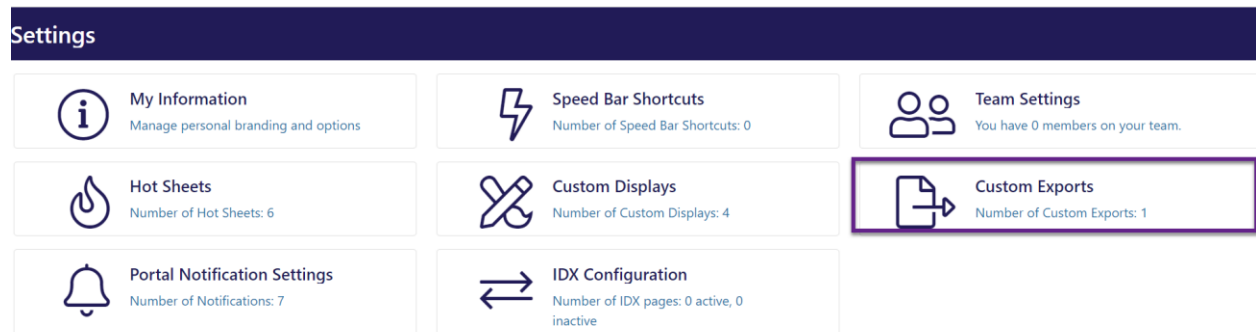
The screenshot shows a search results page for 'RES ACT \$650-850 PORT CHARLOTTE'. The search was run at 11:52 AM. The results table has columns for ML #, Status, Property Condition, Floor Covering, Additional Rooms, Community Features, Address, City, Zip Code, Subdivision Name, SqFT, and Current Price. 11 properties are listed, all with 'ACT' status and 'Under Construction' or 'Pre-Construction' conditions. A red box highlights the first 11 rows, and a red arrow points to the 'Export' button in the 'Actions' menu at the bottom. The 'Export' button is highlighted with a red arrow. Below the 'Export' button, there is a summary of the search criteria: Property Type is 'Residential', Status is 'Active', Property Style is 'Single Family Residence', State is 'Florida', City is 'PORT CHARLOTTE', Current Price is 650000 to 850000, New Construction 'N' is yes, Ordered by Status, Current Price, and Found 11 results in 0.38 seconds.

ML #	Status	Property Condition	Floor Covering	Additional Rooms	Community Features	Address	City	Zip Code	Subdivision Name	SqFT	Current
N6123093	ACT	Under Construction	Ceramic Tile, Porcelain Tile	Breakfast Room	Community Boat Ramp, Deed Restrictions, Fishing, Park, Playground	14464 FORT MYERS AVE	PORT CHARLOTTI	33981	SOUTH GOLF COVE	1,869	\$650,00
C7454761	ACT	Under Construction	Ceramic Tile	Separate, Great Room, Inside Utility		9170 MIGUE CIR	PORT CHARLOTTI	33981	PORT CHARLOTTE SEC	1,642	\$699,90
N6123877	ACT	Under Construction	Ceramic Tile, Laminate			13429 MARKHAM AVE	PORT CHARLOTTI	33953	PORT CHARLOTTE SEC	2,200	\$739,00
D6128378	ACT	Under Construction	Tile		Deed Restrictions	10404 MONTICELLO DR	PORT CHARLOTTI	33981	PORT CHARLOTTE SEC	1,686	\$749,00
D6123416	ACT	Pre-Construction	Porcelain Tile			15546 STUART CIR	PORT CHARLOTTI	33981	PORT CHARLOTTE SEC	2,002	\$749,90
D6127226	ACT	Under Construction	Ceramic Tile		Community Boat Ramp, Deed Restrictions, Park, Sidewalk, Water Access, Waterfront	10486 ATENIA ST	PORT CHARLOTTI	33981	PORT CHARLOTTE SEC	2,064	\$799,90
C7462339	ACT	Pre-Construction	Tile			9494 HORACE CIR	PORT CHARLOTTI	33981	PORT CHARLOTTE SEC	2,170	\$799,90
D6122906	ACT	Under Construction	Ceramic Tile, porcelain Tile			14070 FORT MYERS AVE	PORT CHARLOTTI	33981	PORT CHARLOTTE SEC	2,098	\$799,90
C7468360	ACT	Completed	Porcelain Tile			5435 MONTEGO LN	PORT CHARLOTTI	33981	PORT CHARLOTTE SEC	2,003	\$849,00
D6127717	ACT	Under Construction	Carpet, Vinyl	Den/Library/Office		15384 HENNIPEN CIR	PORT CHARLOTTI	33981	PORT CHARLOTTE SEC	2,262	\$850,00
C7461049	ACT	Pre-Construction	Tile			13112 WINDCREST DR	PORT CHARLOTTI	33953	PORT CHARLOTTE SEC	1,901	\$850,00

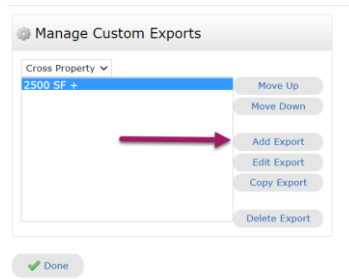
From here, you will have access to all the custom displays that you have saved in Matrix, as well as the default export displays. Select the custom export that you would like to use and select export. This will download the custom Excel spreadsheet to your computer.



You can also create your own custom export template from scratch. To do this, return to the main Matrix homepage. You will access the Utility Menu in the upper right corner and launch into the Settings menu. From here, access the Custom Exports menu.



After you access the Custom Exports menu, in order to begin your own Custom Export you will select the Add Export button as pictured below.



Once you have selected to add your own Custom Export, you will need to add the additional criteria and information necessary to create the Custom Export.

The first step in setting up your Custom Export is to name the export. After that, you will begin to select the criteria you wish to be displayed when using this export. Simply select the criteria and use the add button to select the specified criteria. Once all desired fields are selected, you can rearrange the order of the information using the up and down buttons to the right of the field. Towards the bottom of the page, you can also select how the template is designed regarding to column names and separators. Once you have selected your choices, lock in the Custom Export by selecting the save option in the bottom left corner of the page.

**Set Export Definition** Cross Property

Export Name:

**Available Fields**

- # of Bays
- # of Bays (Dock High)
- # of Bays (Grade Level)
- # of Conference/Meeting Rooms
- # of Hotel/Motel Rooms
- # of Offices
- # of Pets Allowed
- # of Restrooms
- \$/SqFt
- Accessibility Features
- Active Open House Count
- Additional Applicant Fee
- Additional Lease Restrictions
- Additional Membership Available Y/N
- Additional Parcels Y/N
- Additional Pet Fees
- Additional Rooms
- Additional Tax IDs
- Address
- Adjoining Property

Search:

Include Column Names: None  Label  Name

Separator: Comma  Tab

Buttons: Add-> <-Remove Up Down

Bottom Buttons: Save Cancel