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 is 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.

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.
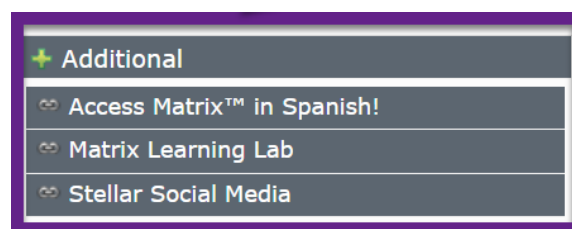

Market Watch

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.
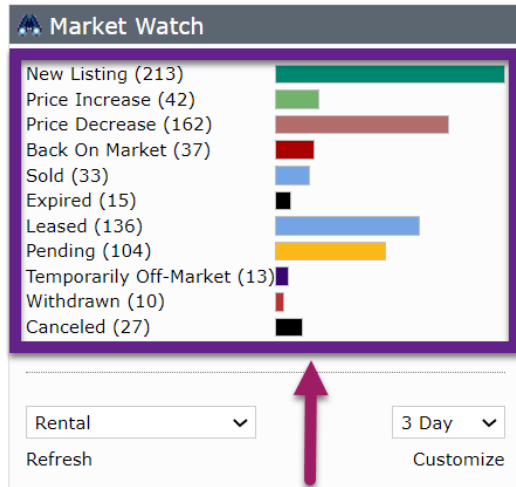

There are various types of data that is reported in the Market Watch widget. You can keep track of new listings, price decreases, temporarily off-market properties, and so many other statuses within the industry.

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.
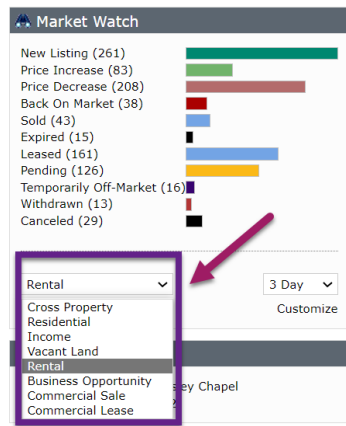

Although all the property classifications are available, it is not necessary to customize all of them. It is also important to note that the customizations that are made for one classification does not transfer to the others. You will need to go into each classification you want to monitor and customize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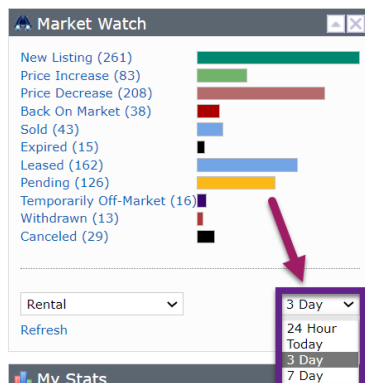

This feature allows you to easily toggle between various timeframes to access data for a specified market. Once you customize the property classifications, getting different views of the market is a breeze.

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.
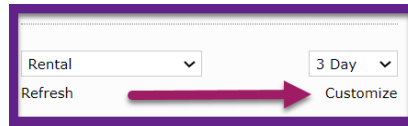

In order to complete the customization process, you will select the property classification you wish to customize from the drop-down menu and select the customize link in the bottom left corner of the widget. This will take you to the customization form, allowing you to select the desired criteria for that property classification.
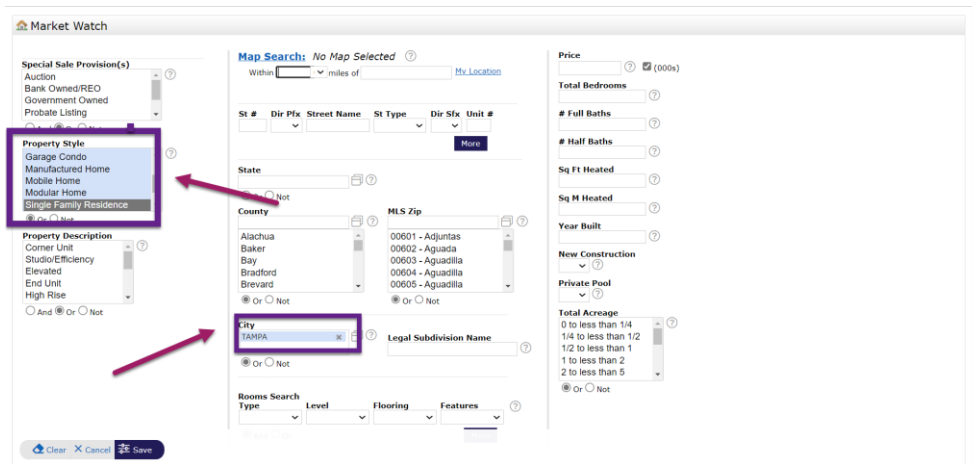
Once you have selected the desired criteria, you will simply lock in your choices using the save button in the bottom left corner of the page. When you return to the Market Watch widget, you will notice that the data being presented has adjusted based off the criteria that was saved during the customization of that classification.
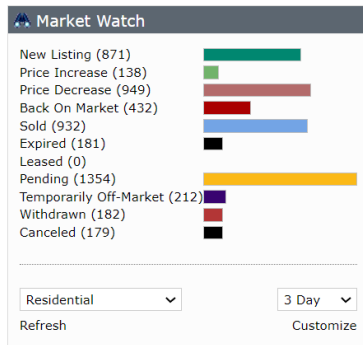
The image on the left shows the Market Watch data prior to customization, which shows the data for the entire Stellar MLS coverage area. The image on the right shows the data displayed in the Market Watch widget after the Residential classification was customized.
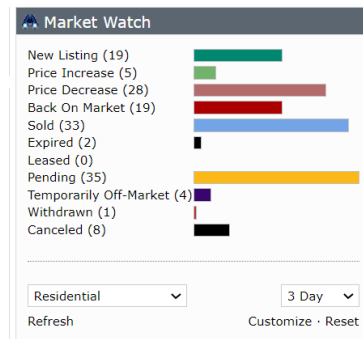
To customize other property classifications, simply select the appropriate classification and repeat the customization process for each induvial classification you would like to keep you eye on. Once you have customized all the classifications you wish to watch, you can simply toggle through the data 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.

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.


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.

**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.
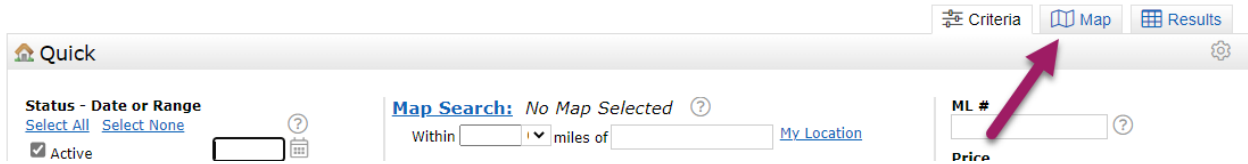

When opening to the map tab without selecting a specific area, the map will populate to the entire Stellar MLS coverage area.
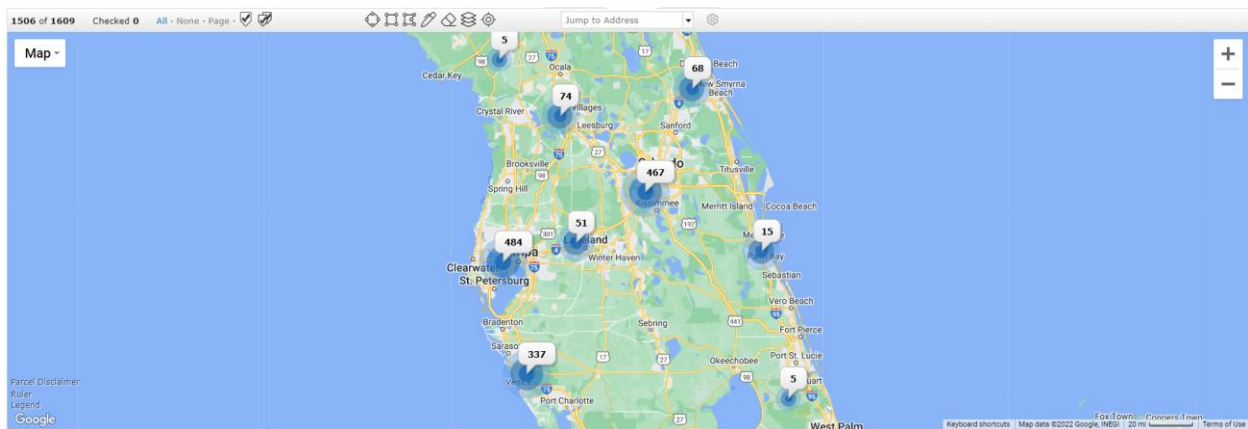
To select a particular area, use the Jump to Address function. You can select a desired search area in two different ways. First, you can type in a specific address into the Jump to Address search bar. This will place a location marker onto the interactive map for that chosen location.
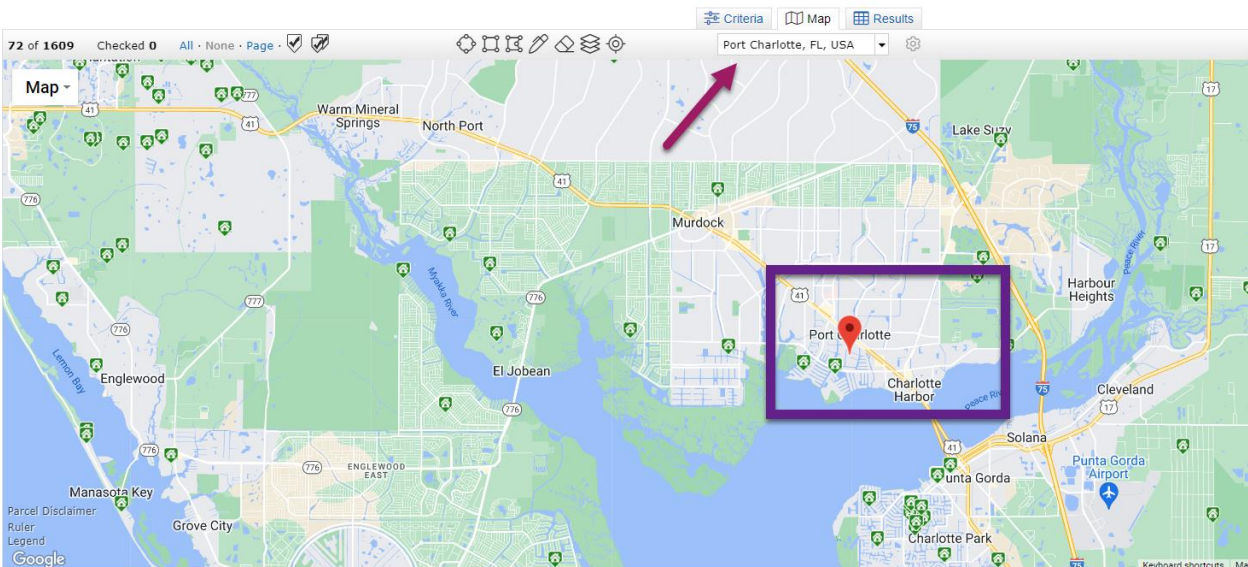
Another option when selecting your desired area is to use the drop-down menu and choose an option from there. You can select your current location, a preset default location, and from a variety of predetermined areas within the Stellar MLS coverage area.
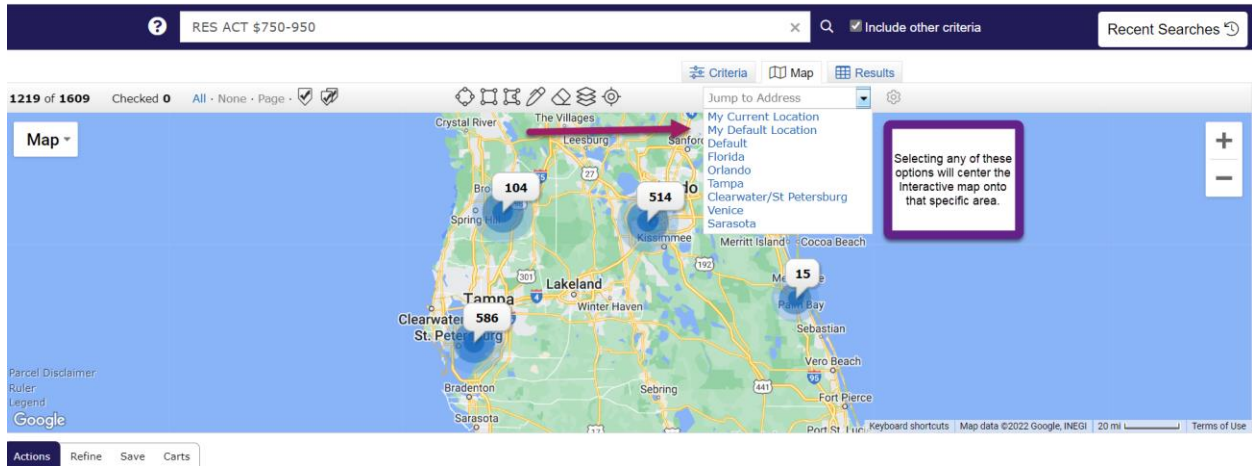
Once the area you wish to select as your default is being shown on the map, select the gear icon located under the results tab next to the Jump to Address search bar. The option to set the current map view as your starting default.
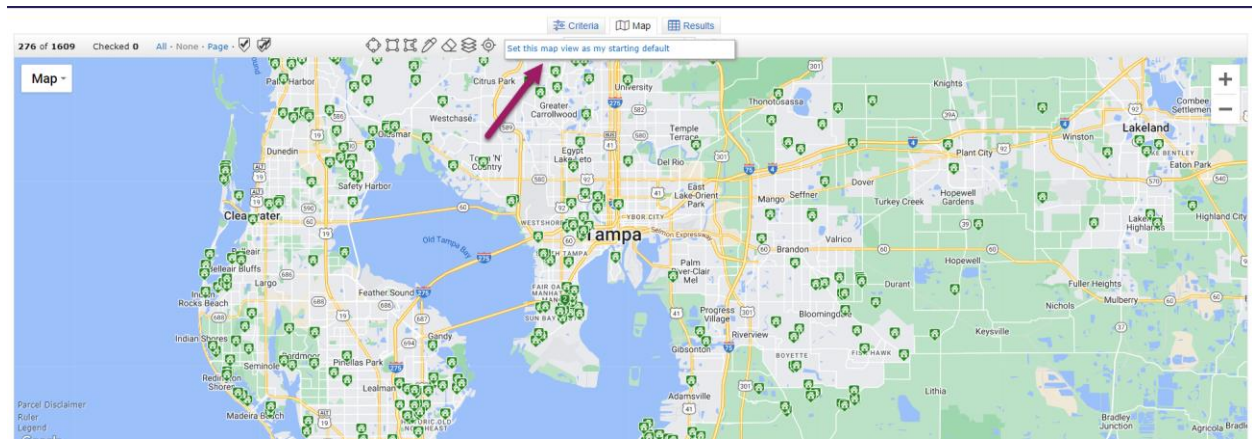
Returning to the system defaults is simple. Return back to the gear icon located next to the Jump to Address search bar and select restore system default map view.
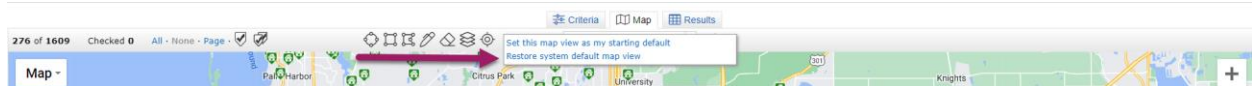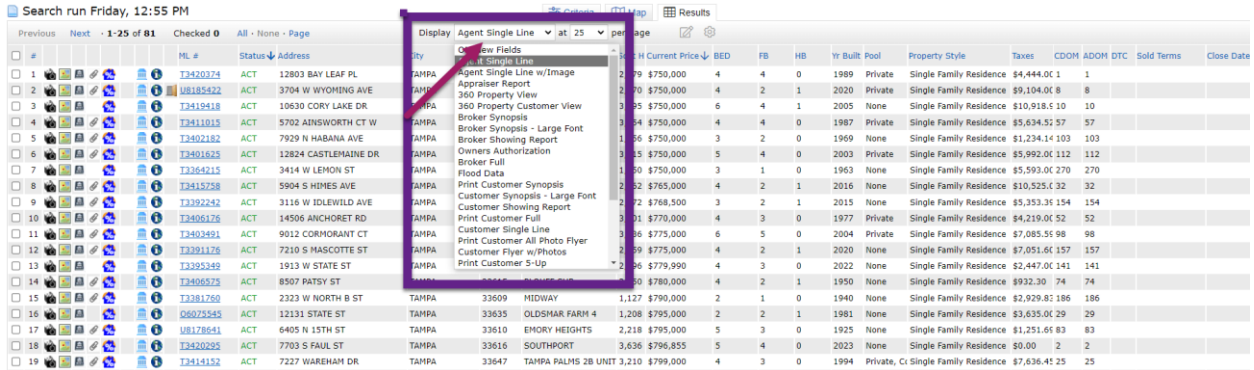
Please note: if you wish to set defaults settings using the Interactive Map, be sure to set the defaults when using different types of search forms. The defaults do not transfer from one type of search form to the other.

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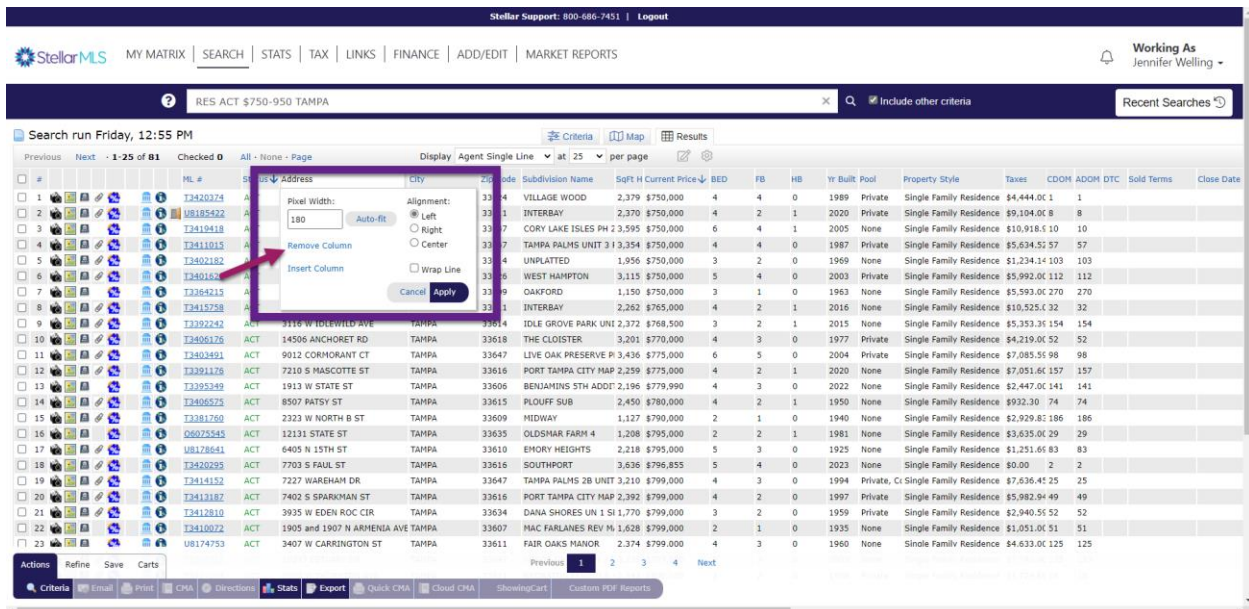
Setting custom displays is a great way to see specific criteria in a single glance when viewing search results. There are several ways in which you can adjust the view that you see in your results displays.

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.


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.

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.
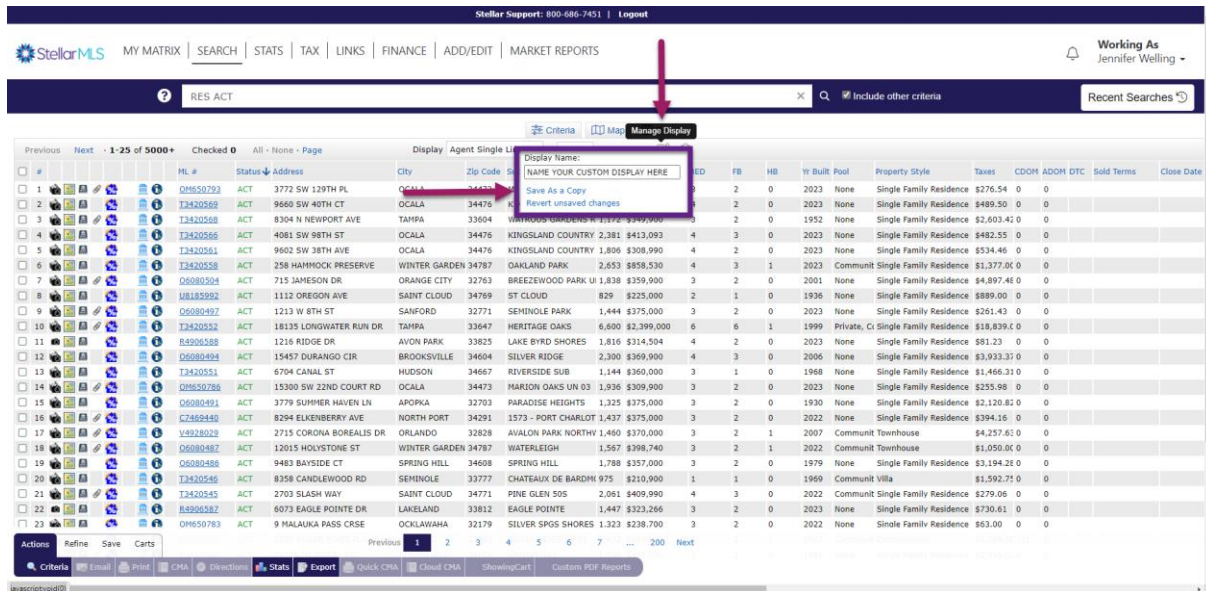
Once you have named your custom display, you can return to the criteria tab and begin to enter in the specific criteria for your search. After adding all the criteria to your search, return to the results tab. This is where you can further customize the data that is available for this custom display. 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.

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.

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 the to 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.

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

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

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

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.
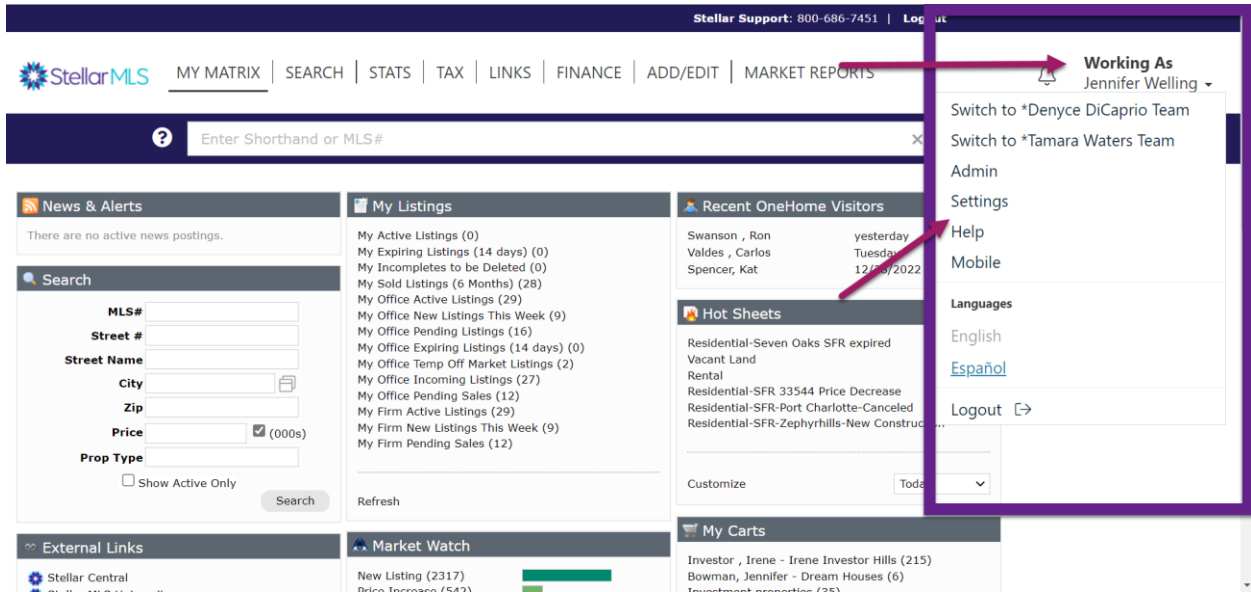
From here, access the Custom Displays menu.
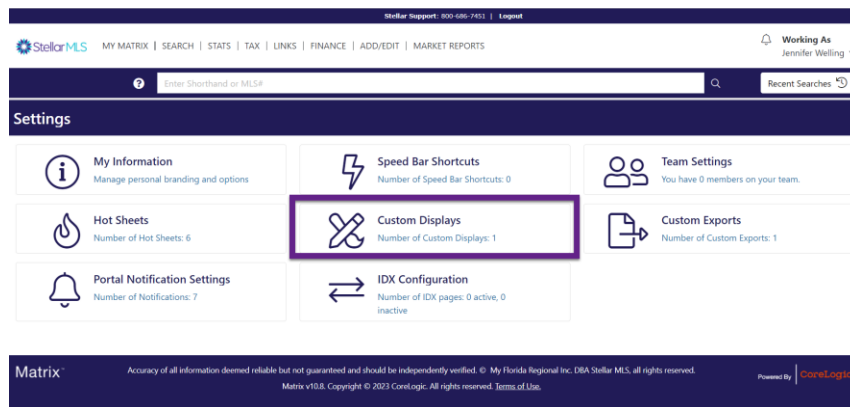
From here, selecting the add button will open the options available to create your own custom display.
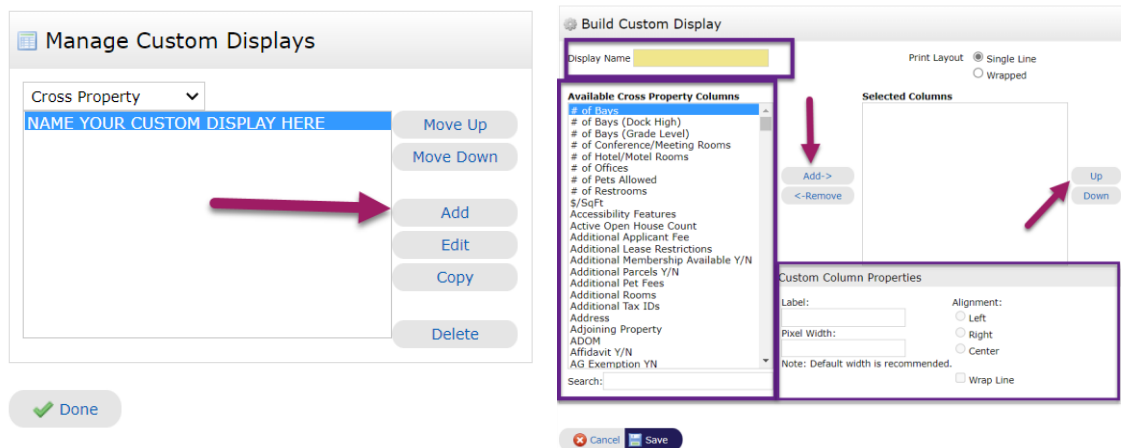
Below are the steps outlined when creating a new custom display.

- ➢ 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.

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.
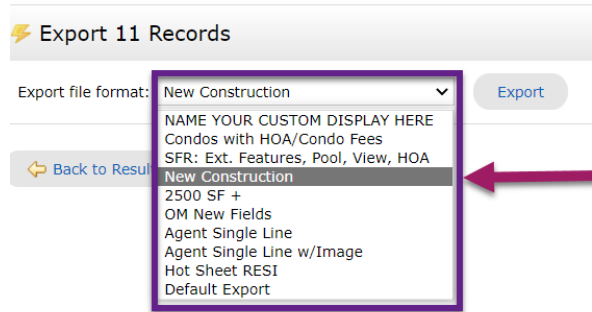
You can also create your own custom export template from scratch. To do this, return to the main Matrix homepage. You will access the Utility Menu in the upper right corner and launch into the Settings menu. From here, access the Custom Exports menu.
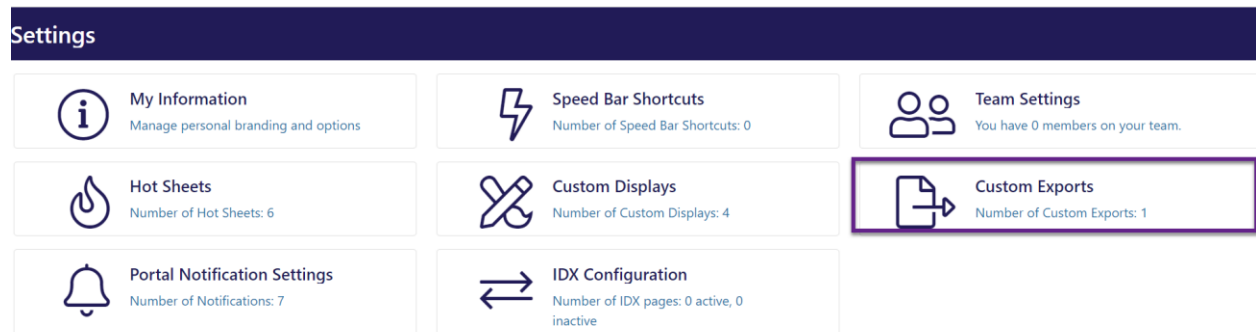
After you access the Custom Exports menu, in order to begin your own Custom Export you will select the Add Export button as pictured below.
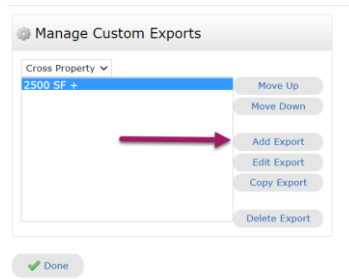
Once you have selected to add your own Custom Export, you will need to add the additional criteria and information necessary to create the Custom Export.

The first step is 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.