


Working with Buyers Course Notes

Introduction to Working with Buyers

- Where buyers found the home they purchased:
 - Internet: 47%
 - Real estate agent: 31%
 - Yard sign/open house sign: 8%
 - Friend, relative or neighbor: 4%
 - Homebuilder or their agent: 8%
 - Directly from sellers/Knew the sellers: 1%
 - Print newspaper advertisement: Less than 1%
- The typical home buyer searches for **10 weeks** before purchasing a home.
Source: [2018 National Association of REALTORS® Profile of Home Buyers and Sellers](#)
- **Takeaway:** before contacting a real estate agent, many buyers have already started searching on their own. Also, an agent may be working with a buyer over a long period. Effective searching, research, and communication throughout the process are critical! Share one of our mobile apps with your customers which will be branded to you, and you become the agent of contact on all properties they view.
- **Finding the right property**
 - Ask clarifying questions to determine what is important to your buyer, such as particular schools, neighborhood amenities, monthly mortgage payment, public transportation, walkability, etc.
 - Separate their “wants” from their “needs.”
 - Be prepared to provide *resources* for financial or mortgage concerns, insurance, taxes, or any other information regarding the purchase.
 - Sometimes, a buyer lead may have extensive criteria, and clarifying questions need to be asked. It is also not uncommon for search criteria to be clarified and refined along the way. Some typical points that may need clarification:
 - **Property Style** – For example, if the buyer says they want a condo, does that include Townhouse or Villa Style?
 - **Price Range** – Is there a maximum price? Range of prices? Has the buyer been pre-qualified to determine this range?
 - **Bedrooms/Bathrooms** - If the buyer says they want a 3-bedroom home, do they mean precisely 3 bedrooms or at least 3 bedrooms? Do they need 3 bedrooms, or are they planning on using one room as an office/den? There is a difference in how we would set up the search.
 - **Garage** - Does the buyer need a 2-car garage or at least a 2-car garage? In many areas, a 3-car garage might be the norm.
 - **Location** - Where do they want to live? What type of community? Do they want to be in a subdivision? Do they want a community with an HOA and/or amenities? Waterfront?

Matrix Search Forms

- Which search form to use? For vacant lots, use Vacant Land. For duplexes or other multi-family properties, use Income Property. If the residential search is what is needed, Quick or Detailed? All of the property types have Quick and Detail search form options. The difference is that “Detail” will have more pre-set fields.
- Default criteria can be set (such as the county, property style, etc.) by clicking the cog icon on the top corner. 
- Keep in mind that in any search, the property will only display if the listing agent has selected that feature for the property. Results may not be complete.

Search Tips

Property Style – For any picklist like this, multiple options can be selected by holding down the Control key (Command key for Mac) and then clicking each option. Underneath these fields, there are radio buttons for “or”, “not”, and sometimes “and.” “Or” means any of the selected criteria will work, “and” means all selected criteria must work, and “not” means that selected criteria should be excluded.

Geographic Fields –

There are fields for Address, County, MLS Zip, City, and Legal Subdivision Name. However, be careful how you mix and match these fields because each field's criteria must be true. For example, Englewood is in both Sarasota and Charlotte counties. If you only want properties in the Charlotte County side of Englewood, enter Charlotte for County AND Englewood for city. If you just want Englewood and are not concerned with the county, leave the county field blank. If you want Hillsborough County but do not want to be in Brandon, enter Hillsborough as the county, type Brandon as the city, and then put a “!” symbol in front of Brandon. **!= exclude**

A county or zip code can be excluded by clicking the “not” radio button. A subdivision can also be excluded by using the “!” symbol.

Next to the zip code field, there is a search icon  where you can pull all zip codes for a city.

When searching for subdivisions, it is best to put a “*” symbol on both sides of the subdivision name. This means that the subdivision “contains” that word. For example, typing in *Palmer Ranch* will pull subdivisions such as Mira Lago at Palmer Ranch, Arielle at Palmer Ranch, Stoneybrook at Palmer Ranch, etc.

Price – There are four ways to enter a price.

Exact #	Plus	Minus	Dash
Only the number entered	Greater than and equal to number entered	Less than and equal to the number entered	Range including numbers entered
200 = exactly \$200K	200+ = \$200K or more	200- = \$200K or less	200-300 = between \$200K and \$300K

Total Bedrooms/Total Bathrooms/Full Baths/Half Baths

Exact #	Plus	Minus	Dash	Zero
Only the number entered	Greater than and equal to number entered	Less than and equal to the number entered	Range including numbers entered	Not or no results
2 = exactly 2	2+ = 2 or more	2- = 2 or less	2-3 = 2 to 3	0 = *no half baths
0 = *no (use this if you are looking for a property with No half bath, perhaps when searching for comps)				

For bathrooms, there is a field for **Total Bathrooms** but also separate fields for Full and Half Bathrooms. For the Total Bathrooms field, enter the whole number of combined Full and Half Bathrooms desired. For example, 3 could mean either 2 full bathrooms and 1 half bathroom (3 total) or 3 full bathrooms and 0 half bathrooms (3 total).

Sq Ft Heated

Exact #	Plus	Minus	Dash
Only the number entered	Greater than and equal to number entered	Less than and equal to the number entered	Range including numbers entered
1700 = exactly 1700	1700+ = 1700 or more	1700- = 1700 or less	1700-1900 = range between 1700 & 1900

Year Built

Exact #	Plus	Minus	Dash
Only the number entered	Greater than and equal to number entered	Less than and equal to the number entered	Range including numbers entered
2018 = built in 2018	2013+ = built in 2013 or later	1930- = built in 1930 or before	1990-1999 = built between 1990 and 1999

New Construction – yes or no

Private Pool – This is only asking about a private pool for the exclusive use of the owner. There is also a checkbox to include properties with a Community Pool.

Total Acreage – filter down by lot size

Floor in Unit/Home – One, Two, Three, Split

Room Search Type – can search for features of specific rooms, such as homes where the Master Bedroom is on the first level or the kitchen has a cooking island.

Garage and Carport – Note that there are fields to search for properties with or without a garage, attached garage, or carport. There are also numeric fields to search for the number of garage and carport spaces. There is also a combined “Garage or Carport” field to search for properties with one or the other, and a minimum number of combined garage/carport spaces.

Searching with Special Characters and Wildcards		
Symbol	Description	How to Use It
+	Greater than or equal to: Allows you to search for values that are greater than or equal to the value you entered. When using the + character, it must follow the value you enter.	<i>Bathrooms: 3+</i> Finds all listings that have 3 or more bathrooms.
-	Less than or equal to: Allows you to search for values that are less than or equal to the value you entered. When using the - character, it must follow the value you enter.	<i>Bathrooms: 4-</i> Finds all listings that have 4 bathrooms or less.
-	Range: Allows you to specify a numeric range.	<i>List Price: 150-200</i> Finds all listings with a list price ranging from \$150,000 to \$200,000.
,	Either/Or: Allows you to enter multiple values in a single field.	<i>Type: 34714,34474,33897,34787</i> Finds all listings that are within those zip codes.
*	Wildcard: Searches for unknown letters and/or numbers.	<i>Sub-Division Name: *Sun</i> Finds all listings that are located in the sub-division that ends with the word Sun . <i>Street name Sun*</i> Finds all listings that are located in the street that begins with the word Sun . <i>Public Remarks/ Realtor Only Remarks: *as-is*</i> Finds all listings with the “as-in” in the property description or realtor only comments. Use commas to separate multiple keywords, to find one or the other.
!	Exclude Selections: Will exclude listings that contain the excluded search criteria. When using the ! character, it must precede the value you enter.	<i>Year Built: !1960</i> Excludes all listings that contain properties that were built in 1960. <i>Public Remarks: !*as-is*</i> Excludes all listing that contains the word as-is in the public remarks field.

Adding Fields to Search Forms

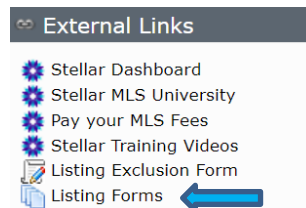
On the bottom of each search form, there is an option to add additional fields. If you click “Add”, you are given a list of all available fields in Matrix and can select which fields you want added to your search form. You can then select fields from an available list (or use the search bar to search for a field by name), click the “add” button, and click “back” to return to the search form to enter your criteria.

Important Notes:

1) It is important to distinguish between a field and the criteria under the field. For example, View is a field. Under that field, you can search for criteria such as Garden, Golf Course, Pool, or Tennis Court View. However, if you were searching for a Golf Course View, you would need to know that the View field is where you would find that. See the next page in this section for information on how to determine which field to add.

2) Once the field is added to your search form, it is important to return to the form to add your criteria. Just adding the View field to your search form will not filter out properties with a Golf Course View. You would need to select Golf Course from the View field once the field is added to your form.

Sometimes, you can use your intuition to determine which field to add to search for certain criteria. For example, if you were searching for homes with a fire, you could probably guess that this criterion is under a field with “Fireplace” in its name. However, what if you were searching for a home with a fenced yard? There is no field with “fence” in the name. “Fence” is a feature under another field, and additional steps need to be taken to determine which field to add. This can be found by pulling the Listing Forms on the home page of Matrix (under the External Links section).

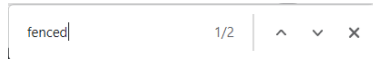


Select the Listing Form for the respective type of property for which you are searching (Residential, Commercial, Income, Vacant Land, etc.). Note that the purpose of the Listing Forms is to help agents collect data for their listings (seller’s must sign this form prior to listing being entered in the MLS), but as the form has every field in Matrix and every characteristic under each field, it is an excellent resource for determining which fields to add to a search form.

View

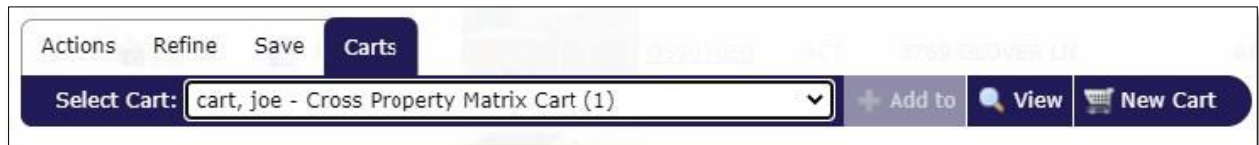
<input type="checkbox"/> City	<input type="checkbox"/> Garden	<input type="checkbox"/> Golf Course	<input type="checkbox"/> Greenbelt	<input type="checkbox"/> Mountain(s)
<input type="checkbox"/> Park	<input type="checkbox"/> Pool	<input type="checkbox"/> Tennis Court	<input type="checkbox"/> Trees/Woods	<input type="checkbox"/> Water

The form is a PDF document. By clicking Control + F in Windows or Command + F in a Mac, a “Find” bar pops up allowing you to search the document for a word or phrase. By searching the listing form for the word “Fenced”, you will find out that “Fenced” is criteria under the “Exterior Features” field. If you want to search for listings with a fenced yard, add the “Exterior Features” field to your search form and then add the criteria “Fenced” under that field.



Wildcard Searches and Carts

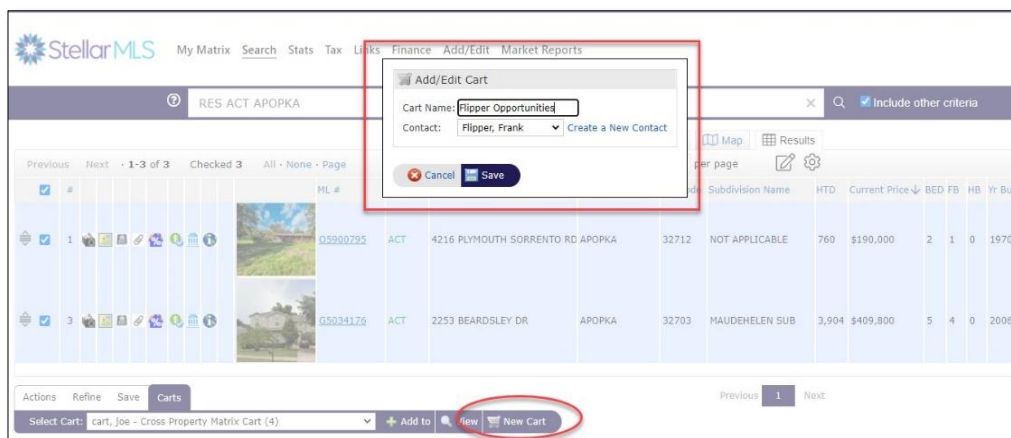
Sample Scenario for Wildcard Search: What if you were working with a buyer looking for an investment or “flip” opportunity for a house that needs work. How would this be found in the MLS? First, there is an option for “fixer” under the Property Condition field. However, not all agents will check that off. Run this search, and then put the listings in a cart. *Carts can be accessed through the “Carts” menu underneath your search results. Each of your Matrix contacts has a cart. Choose the contact, and then click “Add to”.*



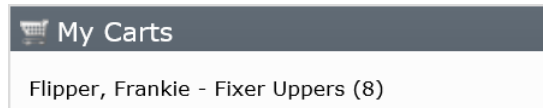
Then, take out the “fixer” filter, and add in the Public Remarks field. Try searching the Public Remarks for *fixer*. When just the word is typed in, most likely, 0 matches will come up, unless the first word of Public Remarks is *fixer*. If you add in the wildcard “*” on each side of the word **fixer**, most likely some matches would come up. But let’s now add some other words, with commas in between (a comma in between means “or”, where no comma means “and”). **fixer*, *TLC*, *handyman special*, *investor special*, *flip*, *needs work**



Add any of these listings to a cart, and then go to the cart to see all the combined results.



Carts can be accessed from the home page in Matrix and managed under the “My Carts” area of the “My Matrix’ tab.



Custom PDF Report

You may create a Custom PDF Report from your actions tab. Select properties you would like included in the report and click on the Custom PDF Reports tab at the far right. Select the type of report you would like to create: Customer Full, Customer Synopsis, Broker Synopsis, Broker Full and click on Create PDF.

Search run Thursday, 11:46 AM

Criteria Map Results

Previous Next · 1-5 of 5 Checked 5 All · None · Page Display Agent Single Line at 25 per page

<input type="checkbox"/>	#	ML #	Status	Address	City	Zip Code	Subdivision Name	HTD	Current Price
<input checked="" type="checkbox"/>	1	A4488031	ACT	2047 MANGO AVE	SARASOTA	34234	HOMEWOOD HEIGHTS	900	\$165,000
<input checked="" type="checkbox"/>	2	A4485169	ACT	2023 RANDA BLVD	SARASOTA	34235	KENSINGTON PARK	1,214	\$169,995
<input checked="" type="checkbox"/>	3	A4481473	ACT	4070 TALLEVAST RD	SARASOTA	34243	NONE	1,752	\$249,000
<input checked="" type="checkbox"/>	4	A4478925	ACT	2089 ARLINGTON ST	SARASOTA	34239	LA LINDA TERRACE	1,727	\$549,900
<input checked="" type="checkbox"/>	5	A4484325	ACT	4411 PROCTOR RD	SARASOTA	34233	BEE RIDGE FARMS SUB	1,812	\$550,000

Actions Refine Save Carts

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

Previous 1 Next

Cloud CMA Buyer Tour Report

After you have selected your properties to show to your buyer, you may “Create a New Buyer Tour”, which is a comprehensive, branded report with information on each listing to share with your buyer. To create the report, select properties and choose Cloud CMA under the Actions tab. The system will pull the selected properties from Matrix into Cloud CMA. Select the Buyer Tour option at the top middle of the screen and create the report. Add your customer’s name and select fetch to grab the listings. You have the option to customize the report, when finished click publish report. Cloud CMA will create a tour of all the properties including your contact information, a guide to homebuying, a map of all the properties, the listings from the MLS, pictures, area schools, restaurants and a place for the buyer to write notes on each property. The report may be printed or emailed.

Search run Thursday, 11:46 AM

Criteria Map Results

Previous Next · 1-5 of 5 Checked 5 All · None · Page Display Agent Single Line at 25 per page

<input type="checkbox"/>	#	ML #	Status	Address	City	Zip Code	Subdivision Name	HTD	Current Price
<input checked="" type="checkbox"/>	1	A4488031	ACT	2047 MANGO AVE	SARASOTA	34234	HOMEWOOD HEIGHTS	900	\$165,000
<input checked="" type="checkbox"/>	2	A4485169	ACT	2023 RANDA BLVD	SARASOTA	34235	KENSINGTON PARK	1,214	\$169,995
<input checked="" type="checkbox"/>	3	A4481473	ACT	4070 TALLEVAST RD	SARASOTA	34243	NONE	1,752	\$249,000
<input checked="" type="checkbox"/>	4	A4478925	ACT	2089 ARLINGTON ST	SARASOTA	34239	LA LINDA TERRACE	1,727	\$549,900
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Actions Refine Save Carts

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

Previous 1 Next

Multi Map Report

You may view these properties on a split screen report called the multi map. Select the properties you would like to include in the report and click on the Print tab under Actions. Select the Multi Map option and click on preview or print. The report will display where the properties are on the map along with the MLS ID, Status, Address, Beds, Full Baths, Half Baths, Year Built, SQFT, List/Sold price and Market / Sold Date.

Search run Thursday, 11:46 AM

Criteria Map Results

Previous Next · 1-5 of 5 Checked 5 All · None · Page Display Agent Single Line at 25 per page

<input checked="" type="checkbox"/>	#	ML #	Status	Address	City	Zip Code	Subdivision Name	HTD	Current Price
<input checked="" type="checkbox"/>	1	A4488031	ACT	2047 MANGO AVE	SARASOTA	34234	HOMEWOOD HEIGHTS	900	\$165,000
<input checked="" type="checkbox"/>	2	A4485169	ACT	2023 RANDA BLVD	SARASOTA	34235	KENSINGTON PARK	1,214	\$169,995
<input checked="" type="checkbox"/>	3	A4481473	ACT	4070 TALLEVAST RD	SARASOTA	34243	NONE	1,752	\$249,000
<input checked="" type="checkbox"/>	4	A4478925	ACT	2089 ARLINGTON ST	SARASOTA	34239	LA LINDA TERRACE	1,727	\$549,900
<input checked="" type="checkbox"/>	5	A4484325	ACT	4411 PROCTOR RD	SARASOTA	34233	BEE RIDGE FARMS SUB	1,812	\$550,000

Actions Refine Save Carts

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

Print 5 Listings

Print which format(s)? To select multiple at once, hold Ctrl while you click (option key, on a Mac)

- 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 5-Up
- Hot Sheet REST
- BPO Report
- Green Features Detail Report
- 4-Up Appt
- Multi-Map
- RES Broker Synopsis Single Page PDF
- RES Customer Synopsis Single Page PDF
- COMS Customer Synopsis Single Page PDF
- COMS Broker Synopsis Single Page PDF
- COML Customer Synopsis Single Page PDF
- COML Broker Synopsis Single Page PDF
- BUSO Broker Synopsis Single Page PDF
- BUSO Customer Synopsis Single Page PDF
- COM Broker Synopsis Single Page PDF
- COM Customer Synopsis Single Page PDF

Print without header or footer

First page, last page

Every page

Print with roll-outs (if any) open

Print search criteria

Ink saver; if any, don't print images

Language: English

Back to Results Email PDF Print to PDF Preview Print

MLS #	Status	Address	Bd	Bh	Hb	Yr Bld	Sqft	List/Sold \$	Market/Sold Dt
A4488031	ACT	2047 MANGO AVENUE	2	1	0	1925	900	\$165,000	01/09/2021
A4485169	ACT	2023 RANDA BOULEVARD	3	2	0	1956	1,214	\$169,995	12/02/2020
A4481473	ACT	4070 TALLEVAST ROAD	3	2	0	1987	1,752	\$249,000	10/21/2020
A4478925	ACT	2089 ARLINGTON STREET	2	1	0	1924	1,727	\$549,900	09/22/2020
A4484325	ACT	4411 PROCTOR ROAD	3	2	0	1969	1,812	\$550,000	11/21/2020

Excel Spreadsheet

You may also create an Excel Spreadsheet with the results by clicking on Actions tab and then the export tab. The system will create an excel spreadsheet from the agent single line display that you may save.

Search run Thursday, 11:46 AM

Criteria Map Results

Previous Next · 1-5 of 5 Checked 5 All · None · Page Display Agent Single Line at 25 per page

<input checked="" type="checkbox"/>	#	ML #	Status	Address	City	Zip Code	Subdivision Name	HTD	Current Price
<input checked="" type="checkbox"/>	1	A4488031	ACT	2047 MANGO AVE	SARASOTA	34234	HOMEWOOD HEIGHTS	900	\$165,000
<input checked="" type="checkbox"/>	2	A4485169	ACT	2023 RANDA BLVD	SARASOTA	34235	KENSINGTON PARK	1,214	\$169,995
<input checked="" type="checkbox"/>	3	A4481473	ACT	4070 TALLEVAST RD	SARASOTA	34243	NONE	1,752	\$249,000
<input checked="" type="checkbox"/>	4	A4478925	ACT	2089 ARLINGTON ST	SARASOTA	34239	LA LINDA TERRACE	1,727	\$549,900
<input checked="" type="checkbox"/>	5	A4484325	ACT	4411 PROCTOR RD	SARASOTA	34233	BEE RIDGE FARMS SUB	1,812	\$550,000

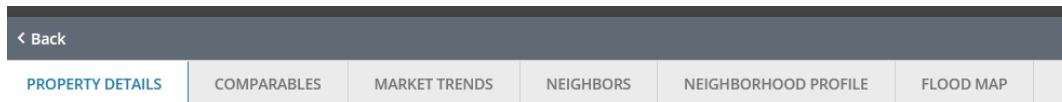
Actions Refine Save Carts

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

From the agent single line or the MLS ID 360 property display you may access property reports from Realist or iMap by clicking on the icon from the subject property.

	<input type="checkbox"/>	1									A4481284	ACT	611 25TH AVE W
	<input type="checkbox"/>	2									A4488031	ACT	2047 MANGO AVE
	<input type="checkbox"/>	3									A4485169	ACT	2023 RANDA BLVD

Realist will pull subject the property from the MLS into Realist displaying the property on the map and in on the agent single line view. To access the reports for the property, select reports at the bottom right of the screen and choose the report you would like to share with your buyer. Choose all reports or customize to the ones you would like to share with your buyer. Realist provides reports on Property Details, Comparable, Market Trends, Neighbors, Neighborhood Profile and Flood Map. An example is the neighborhood report that compares the subject property to neighboring properties in the community.



You may access **iMap** from the agent single line display or MLS ID 360 property report to get information on public record information including Ad Valorem and Non-Ad Valorem taxes, deed information, building information, school(s) and their ratings and flood zone information through the Property Tax Detailed Report. You have access to Comparable properties, Residential MLS Stats, Demographics and maps



Customizing Results Grids/ Refining Searches

Now let's kick this up a notch. You have a buyer looking for a condo but wants to either be on the ground floor or on an upper floor in a building with an elevator. How would you search for this?

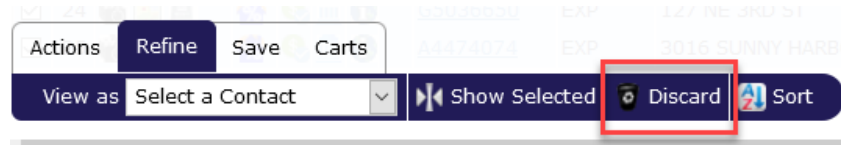
As this involves contingencies (I want the first floor unless there is an elevator), this cannot be set up in a single search. Perhaps as an alternative, we want to run the broader search for all condos in the buyer's geographic area, price, and size range. We can then add columns to the search results to filter out the units that do not match our criteria.



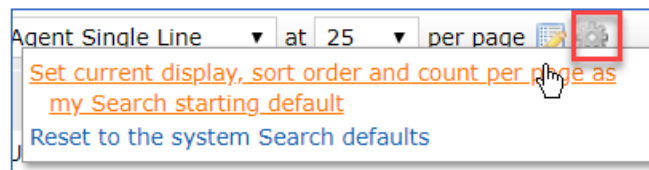
Run the search, and then click on a header in the search results where you would like to insert a new column. When you click “Insert Column”, you will see a list of all available fields in Matrix. Insert columns for *floor*, *number of floors*, and *Building Elevator Y/N*. Go through the results and check off the listings that do not meet these criteria.

#	ML #	Status	Floor Number	Building Elevator Y/N	Address
1	U7836191	ACT		Yes	2630 PEARCE DR Unit#303
2	U8022340	ACT	8	Yes	255 DOLPHIN PT Unit#806
3	U7844630	ACT	11	Yes	31 ISLAND WAY Unit#1101
4	U8015336	ACT	2	Yes	51 ISLAND WAY Unit#203
5	U8005588	ACT	1	Yes	31 ISLAND WAY Unit#109
6	U7846181	ACT	3	Yes	690 ISLAND WAY Unit#311
7	U8021104	ACT	8	Yes	31 ISLAND WAY Unit#803

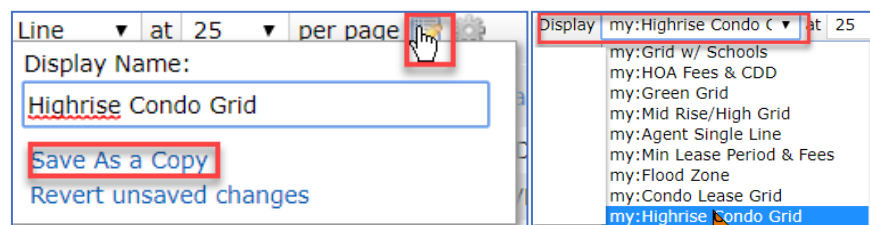
Then go to the refine menu to show how to narrow the search down to only these properties selected.



Alternative Scenario: For homes in HOA or CDDs, you may want to see in the results grid what the HOA Fees, HOA Payment Schedules, and CDD Fees are without filtering listings based on those criteria. Or, you may want to add flood zones to the results grid. To save this as your new default grid, click on the cog icon on the top corner of your results.

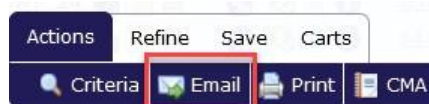


Or click the “Manage Display” icon to save this as a custom display that can be applied to future results.

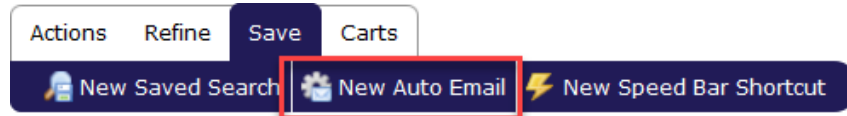


Emailing Results

At the bottom of your search results, there are several options to save or email searches. First under the “Actions” menu, there is an “Email” button which allows you to send a one-time email to a contact in Matrix with whichever listings you select.



Then, under the Save menu, there is an option for both a Saved Search and an Auto Email. For both one-time emails and auto emails, your customer is sent a link into a portal where they are able to view the listings you send them, favorite properties, leave notes, etc.



- *First of all, both saved searches and auto emails focus on criteria, not listings. The only way to save a specific listing is through a cart (discussed earlier).*
- *A Saved Search is solely for your use and is not emailed out.*
- *An auto email is where both the initial and future results are automatically emailed out. An auto email still has a saved search component as you can save the search behind the auto email to their home page in Matrix.*

Setting Up Auto Emails

On the menu underneath your search results, go to “Save” and then “New Auto Email”. Select your contact and choose whether or not you want to be Bcc’d on the email. Enter a subject. For the welcome and recurring message, you are given default text, but are able to modify the text. The welcome text is what goes out with the first email. The recurring text goes out in subsequent emails. To set your custom text as a new default, click on the gear

icon in the bottom corner of the text box. 

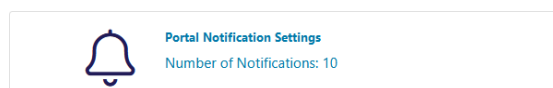
Under the Settings section of the auto email wizard, if you select “Enable Concierge Mode”, any listings will be sent to you first for approval. If this is not selected, the Schedule section will appear where you can select if you want emails to go out ASAP, Daily, or Monthly. There are also display options to Enable as a Favorite Search on Home Tab (if you want the search behind this email to appear on your home page Favorite Searches widget).

Note: Your customer must click on the portal link in the Auto Email Welcome Message to opt in to receiving future notifications.





Managing Contacts

Sending an email (or auto email) is only half the battle! Keeping our buyers engaged is much more challenging, but Matrix offers several tools to make this easier.

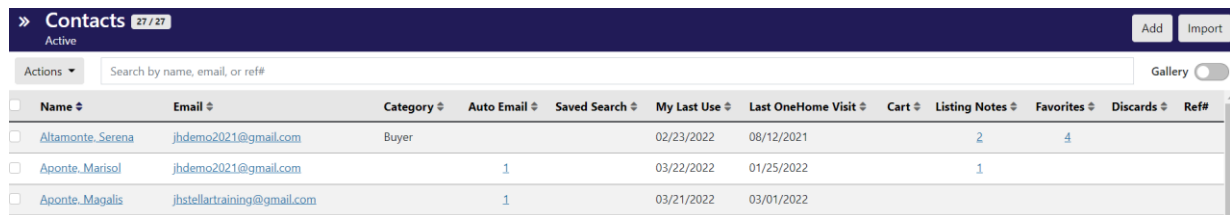
- **Portal Notification Settings** – Under the Working As on the top right side of your screen choose the drop-down arrow by your name then select settings and Portal Notification Settings



- **The Recent Portal Visitors Widget** on your home page shows you which contacts have most recently visited their portals and if they favorited properties or left notes.

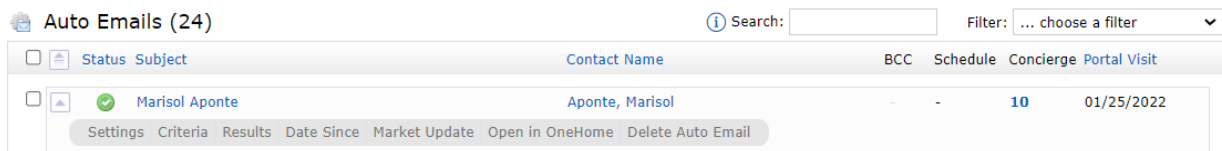
Recent OneHome Visitors			
Carter, Susan	03/29/2022	 7	 2
Aponte, Magalys	03/28/2022	 4	 1
Valentine, Happy	03/28/2022	 3	 1
Barrios, Raquel	03/28/2022	 1	

- **Contacts Menu** – Under the My Matrix tab, you have an option for contacts. Here, you not only can view your existing contacts and add new contacts but also track each contact's last portal visit, if they favorited, marked as a possibility, or discarded a listing, and if they left a note.



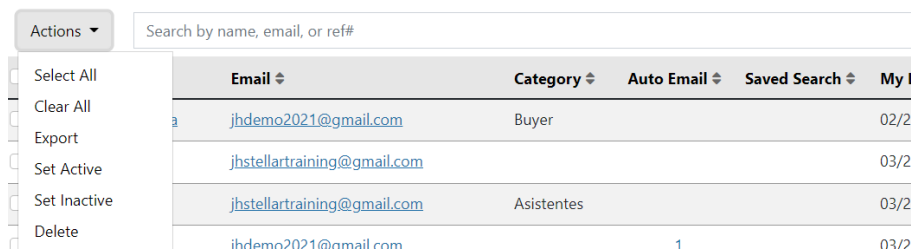
Name	Email	Category	Auto Email	Saved Search	My Last Use	Last OneHome Visit	Cart	Listing Notes	Favorites	Discards	Ref#
Altamonte, Serena	jhdemo2021@gmail.com	Buyer			02/23/2022	08/12/2021		2	4		
Aponte, Marisol	jhdemo2021@gmail.com		1		03/22/2022	01/25/2022		1			
Aponte, Magalis	jhstellartraining@gmail.com		1		03/21/2022	03/01/2022					

- **Managing Saved Searches and Auto Emails** – Under the My Matrix tab, there is an area to manage both your saved searches and your auto emails. You can change the criteria, delete a search or email, and resend a welcome message for an auto email.



Status	Subject	Contact Name	BCC	Schedule	Concierge	Portal Visit
✓	Marisol Aponte	Aponte, Marisol			10	01/25/2022


- **Display Contacts using filters** – Under the My Matrix Contacts tab there is a way to display the contacts by category. Select the Filter option next to Status. Choose the category option and select which category you would like to display.







Email	Category	Auto Email	Saved Search	My I
jhdemo2021@gmail.com	Buyer			02/2
jhstellartraining@gmail.com				03/2
jhstellartraining@gmail.com	Asistentes			03/2
ihdemo2021@gmail.com		1		03/2

Researching Properties

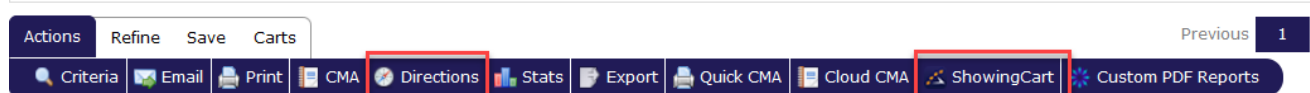
A buyer favorites a property in their portal. Now they want more information. What can you find through the listing? There are several buttons in the results grid and on top of a listing for you to get more information.

- **Matching Properties history**  - Shows the history of this Property ID in the MLS, dating back 10+ years. Can see history of withdrawn listings, expired listings, previous MLS sales, if the contract went pending and back on market before, price change history, etc.

- **DPR - Down Payment Resource Assistance**  - The DPR button links to a report of local, state, and federal down payment assistance programs for which a property might be eligible.
- **Rate Plug**  - Rate Plug is an additional tool offered to STELLAR MLS subscribers allowing them to run co-branded flyers with their preferred lender(s). Can sign up for Rate Plug and select lender on STELLAR MLS login page. If configured, can run a flyer for each listing with real-time rates.
- **Realist/iMapp**  - public records reports
- **Remine**  - Remine is a tool you may use to search for properties in the MLS using filters. It is a predictive analytics tool and generates public record reports.
- **360 Property Data (Public Records in Matrix)** - Across the top of a listing, there are several tabs with public records information. These include: Tax (basic public records info), Photos (historic MLS photos), History (both sales history and MLS listing history), Parcel Map (including a “walk the block” feature to click on neighboring properties for information), a Flood Map, and if applicable, a Foreclosure tab.


Driving Directions and ShowingCart

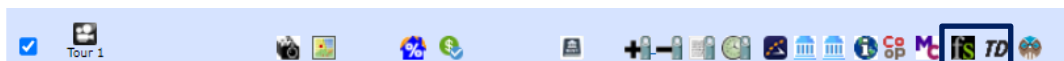
Now, your buyer wants to see some of the properties. There are several options under the “Actions” menu under your search results.



- **Driving Directions** - Run driving directions between listings. Reorder the listings and add custom starting or stopping points. Print the directions or email them directly to your customer.
- **ShowingCart** – If you plan to show multiple properties in a day, launch them all into the “Showing Cart”. Then, you can go in to determine an order and request all showings at once.

Launching Contracts from Matrix

If all goes well, the buyer is now ready to make an offer. From the top of a listing, a transaction file can be launched in either Transaction Desk **TD** or Form Simplicity .



Staying Connected to your buyer through eProperty Watch

To stay connected to your buyer after the purchase of their new property, invite to be a part of eProperty Watch by adding them to your contacts and clicking on invite. Set them up to receive automated reports pertaining to their property and the market around them.