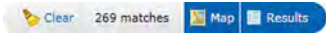


Auto Email

Auto Email (Create)

- 1 Create a **Search** and view the results.



Note: for more information, see the, "Search" section.

- 2 From the, "Results" or, "Map" tab, click, "Save > **New Auto Email**" on the Button Bar.



- 3 **Recipients**

- 3a Select a, "**Contact**" from the dropdown list (mandatory).
Note: click the, "Create a New Contact" link to add a contact not yet in your address book.

- 3b Select, "BCC" to be notified when your customer is sent a new Auto Email.

- 4 **Messages**

- 4a Enter a Subject line (mandatory).

- 4b Use the default, "**Welcome Email**" and, "**Recurring Email**" or customize the text to create your own messages.

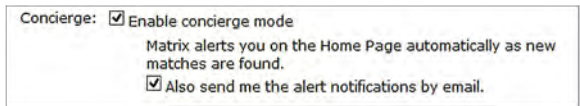
Note: click the, "Settings" icon to either set your custom message as the new default or to reset it back to the system default.

- 5 **Settings**

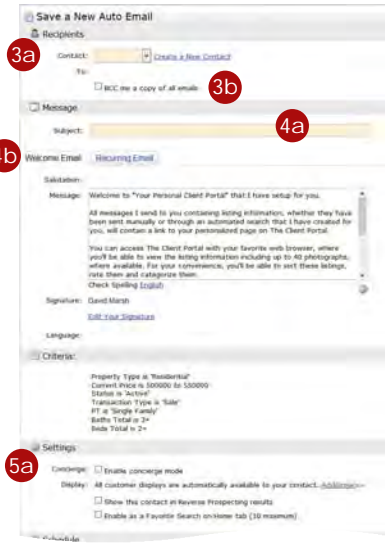
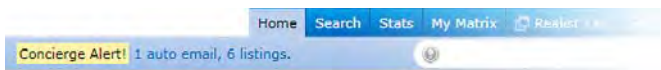
- 5a An Auto Email, by default, automatically sends a client new, or updated, listings at whatever interval is selected in the, "Schedule" option.

Enable, "Concierge Mode" if you would prefer to review (approve or reject) each listing first before they are sent to the client (optional).

Note: when Concierge is enabled, click the, "Also send me the alert notifications by email" option to be notified, by email, that there are listings waiting for your approval in Matrix.

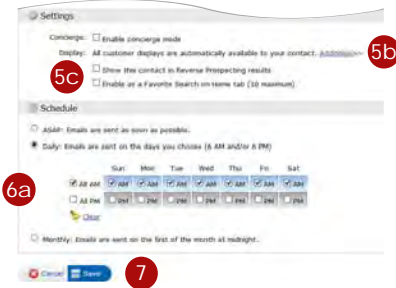


Note: Matrix alerts you of any new matches in the, "Concierge" Widget on the Homepage (for more information see, "Concierge" under, "Home Widgets" in the, "Home" section.) as well as on each page, in the information bar, located just below the menu tabs..



5b Select an additional display to include in the Client Portal.
Note: this display will only be available, to the client, for the Auto Email with which it was selected.

5c Click the, "Reverse Prospecting" checkbox to allow listing agents to view when their listing has been sent to this customer.
Note: this feature can also be enabled in the contact's management area (see, "Contacts (Add) in the, "My Matrix" section).



6 Schedule

6a **ASAP:** Emails are sent as soon as possible.

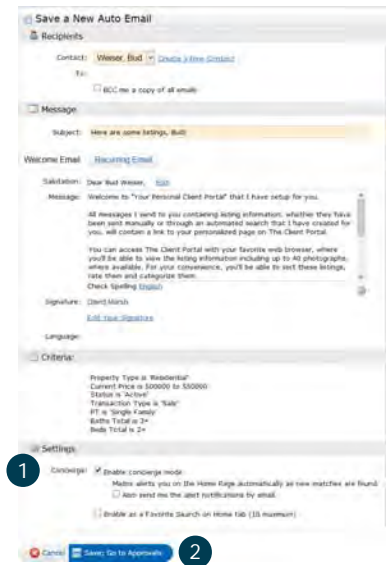
Daily: Emails are sent during the days, and time period, selected.

Monthly: Emails are sent on the first day of the month.

Note: Auto Emails that are not read within a system-specified period of time are automatically suspended until re-enabled by the agent.

7 Click, "**Save**" to create this Auto Email.

Note: if, "Concierge Mode" is enabled, this button takes the agent to the Concierge area where listings can be accepted or rejected.



Concierge Mode

1 Click checkbox to enable, "**Concierge**" Mode.

Note: when Concierge Mode is enabled, you are no longer able to, "Schedule" when Auto Emails are sent.

Note: notification of new listings waiting for approval can be found in the, "Concierge" widget located on the Home Page as well as to the left of the, "Speed Bar" textbox on each page.

Note: click the, "Also send me the alert notifications by email" checkbox if you would like to also be notified by email of new listings waiting for approval.

2 Click, "**Save; Go to Approvals**" to review listings.

3 **View** if/when a listing has already been sent.

Note: listings that have never been emailed to this client display, "Never" while listings that have will display their date sent.

4 **Select/deselect** single, or multiple, listings to send.

Note: for more information, see, "Search Results" in the, "Search" section.

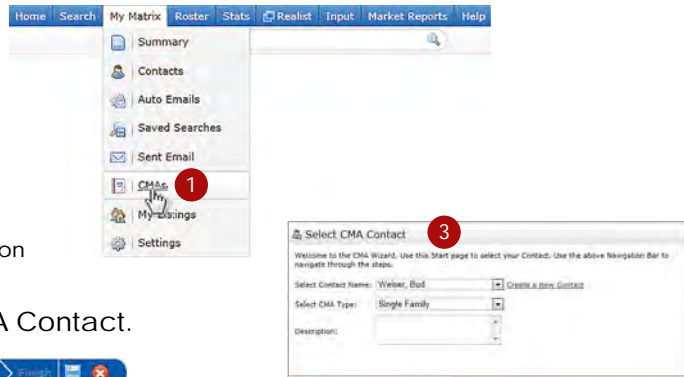
5 Click, "**Approve Selected**" on the Button Bar.

Note: if no listings are selected, the, "Approval" link on the Button Bar will give the option of approving all.



CMA (Create)

- 1 From the Matrix navigation menu, hover the, "My Matrix" tab and select, "CMA".
- 2 Click, "Start a New CMA" on the Button Bar.



Note: see, "My Matrix > CMA" in the "Button Bar" section for a full list of Button Bar functionality.

- 3 Click **Start** (default position) to select a CMA Contact.







Note: from the dropdown list, you may also change your CMA property type as well as add an optional description in the textbox provided description will not be visible on the final CMA).


- 4 Click **Pages** to select from, "Available Pages".



Note: add Custom Pages (.pdf only) to your CMA by clicking the, "Upload Custom Pages" link located below the, "Available Pages" listbox. By default, you are limited to 5 "My Custom Pages" - each with a maximum file size of 250KB. Only letter size content can be properly accommodated (landscape or portrait).

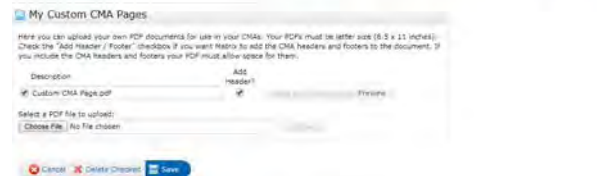
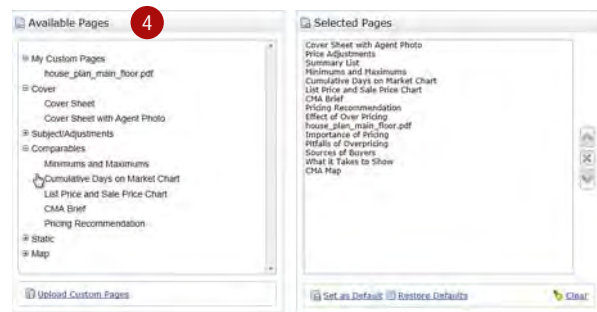
Note: in the, "Available Pages" listbox, click the, "Expand"  icon next to a category to reveal the available pages. Alternatively, click the, "Collapse"  icon to hide the available pages.

Note: in the, "Selected Pages" listbox, select a page, or multiple pages (while pressing the CTRL key), and use the, "Up"  and, "Down"  icons to reorder page(s) as they will appear in the final CMA. Also note that the final CMA pages are not numbered so they may also be reordered after print.

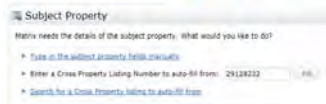
Note: in the, "Selected Pages" listbox, select a page, or multiple pages (while pressing the CTRL key), and use the, "Remove"  icon to remove page(s) from the final CMA.

Note: click the, "Set as Default" link to set the selected pages as your starting default for all future CMA's. To restore default pages after removing or reordering pages, simply click the, "Restore Defaults" link.

Note: click the, "Clear" link to remove all pages from the, "Selected Pages" listbox.



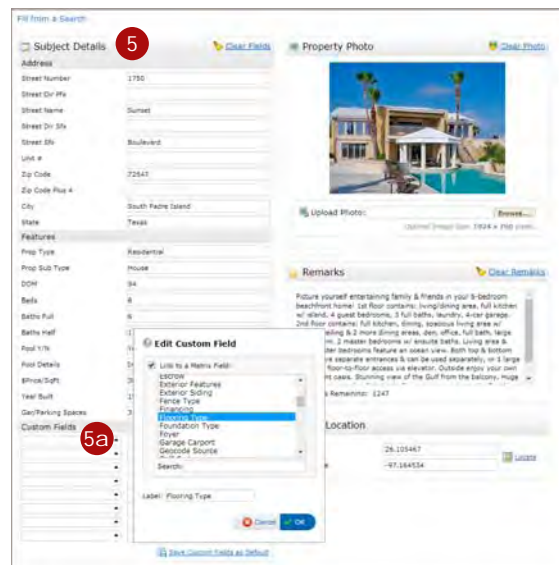
- 5 Click **Subject** to fill Subject Property details from a blank form, a listing number or by searching for a listing.



- 5a Click the, **Custom Field** dropdown list to add an additional field to the Subject Property.

Note: from the, "Edit Custom Field" pop-up, either manually type in a label name or select the, "Link to a Matrix Field" check box and the label will automatically be added with any stored value.

Note: Click the, "Save Custom Fields as Default" link to include your Custom Fields in future CMA Subject Properties.



- 6 Click **Cover** to add your contact information, subject photo, agent information and agent logo to the CMA cover.

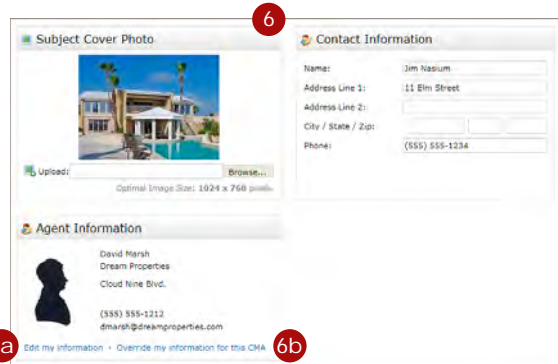


Note: this step will be disabled if no cover sheet was selected in, "Pages".

Note: to include the default, or a custom, agent logo on the final cover, ensure that, "Cover Sheet with Agent Photo" was selected in, "Pages".

- 6a Click the, "**Edit my information**" link to update your Agent information as it should appear in all CMA's.

- 6b Click the, "**Override my information for this CMA**" link to update your Agent information for just this CMA.



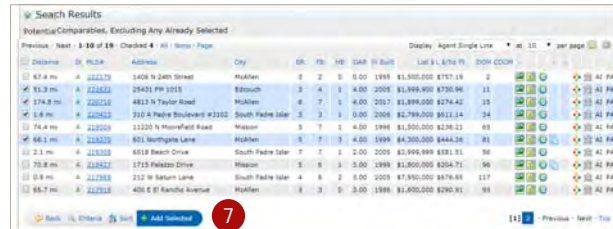
- 7 Click **Comparables** to add comparables from a search or from a cart.



Search for Additional Comparables | Add Comparables from Cart

Note: for more information, see, "Criteria Search" in the, "Search" section.

- 8 Click **Map** to include a map that displays the location of comparables in relation to the subject property.



Note: you must first include the, "Map" page, in the, "Pages" section to enable this step.

- 9 Click **Adjustments** to adjust a comparable's feature value.



- 10 Click **Pricing** to view a Summary of Comparable Prices and Adjusted Comparable Prices.



Note: add a suggested price based on the low, median, average and high comparable values provided (optional).

Adjustment Details

Feature Value	Status	Price/Adjusted Price	Bathrooms	Bedrooms	Square Footage
9304 9448 St			10,000	5,000	
Brookdale	Active	1 85,001	0 60,000	0 25,000	0
3003 Alan Island	Active	13,505,000 13,577,500	75 52,500	0 28,000	1212
2346 N. Harmons Dr.	Sold	264,500 304,500	2.50 35,000	4 5,000	3176
2127 St. 292nd	Sold	50,000 115,000	1.00 50,000	2 15,000	1500
2909 232nd Ct # 13	Expired	35,500 104,500	3.00 40,000	4 5,000	1400
12450 Kinrossen Bld	Expired	949,000 1,604,000	3.00 35,000	4 5,000	3862
Low		1 85,001			
Median		142,000 209,750			
Average		2,473,834 2,531,750			
High		13,505,000 13,577,500			

- 11 Click **Finish** for a, "CMA Summary" and to view or email your completed CMA.



View CMA | Email CMA

Summary

The following table summarizes the prices calculated from the adjusted comparables:

	Low	Median	Average	High	Count
Comparable Price	1	162,000	2,473,834	13,505,000	6
Adjusted Comparable Price	85,001	209,750	2,531,750	13,577,500	6

Stats

Stats (Preset)

- 1 From the Matrix navigation menu, hover the, “Stats” tab and select any of the **Property Types**.

- 2 Select the, “Presets” tab.

- 3 Click a **Preset** statistic link.

- 4 Select criteria from the, “Search” tab.

Note: when running a regular search (see, “Criteria Search” in the, “Search” section), click, “Stats” on the Button Bar for a quick way of viewing statistics using criteria that you have already entered.

- 5 Click the, “Expand” icon to, “**Save a Copy**” of this Preset (optional).

Note: a “Copy of” Preset will appear under the, “My Presets” heading.

Note: customize or add search criteria then save your updated preset (for more information, see, “Stats (Save)” in the, “Stats” section).

- 6 Click, “**Generate**”.

Stats (Customize)

- 1 From the Matrix navigation menu, hover the, “Stats” tab and select any of the **Property Types**.

- 2 Select the, “Customize” tab.

- 3 Select a, “**Time Frame**” from the dropdown list.

- 4 Select a, “**Statistic**” from the dropdown list.

- 5 Click the, “Advanced Options” link to select a, “**Secondary Statistic**” from the dropdown list.

Note: you must first select a statistic before the, “Advanced Options” link is enabled.

- 6 Select a, “**Group By**” item from the dropdown list.

Note: you must first select a statistic before the, “Secondary Statistic” dropdown box appears.

- 7 Add a, “**Chart Style**” (optional).

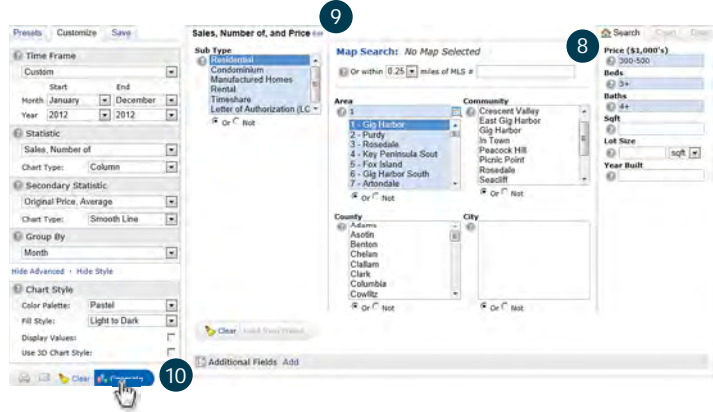
- 8 Select criteria from the, “**Search**” tab.
Note: when running a regular search (see, “Criteria Search” in the, “Search” section), click, “Stats” on the Button Bar for a quick way of viewing statistics using criteria that you have already created.

- 9 Give your statistic a **Name** (optional).

- 10 Click, “**Generate**”.



Note: click the, “Chart” tab to view the statistics chart or click the, “Data” tab to view just the numerical data.



Stats (Save)

- 1 After choosing a Preset or a Customized stat, select the, “**Save**” tab.
- 2 Give your statistic a, “**Name**” (optional).
- 3 Check, “**Save Search Criteria with Preset**” to save the statistic(s) and the criteria together (optional).

Note: when clicking this from, “My Presets” on the, “Presets” tab, you will have the option of running this with, or without, the saved criteria.

- 4 Check, “**Show on Home Page Stats Widget**” to save this statistic for quick access on the Home Page Stats Widget (optional).

Note: you must check the, “Save Search Criteria with Preset” checkbox to include this on the Home Page Stats Widget.

- 5 Click, “**Save**”.

Save a Copy: make a duplicate of the current stat.
Delete: delete the current Preset stat.



Primary Year	Sales, Number of	Sale Price, Median
2007	81,979	\$323,950
2008	54,208	\$299,999
2009	52,263	\$270,000
2010	53,242	\$259,747
2011	125	\$237,750
2012	1	\$200,000