

Matrix Overview Part 1- Getting Started



CE hours: 3
Course #: 47548



Houston Association
of REALTORS®

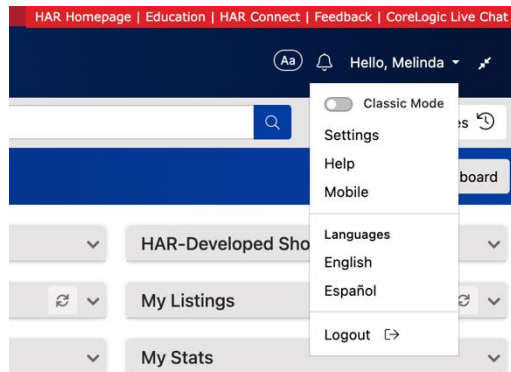
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Course Description

This course will provide students with a foundation of knowledge to navigate the Matrix MLS, run several different types of searches, work with results, share listings, and set up Auto-Email for Contacts.

Matrix help- In the top right corner of the screen you can see your name with a drop-down arrow. This area is loaded with great info and tools! You can toggle off the Classic Mode dashboard to see a more modern widescreen dashboard!



Settings is a shortcut to change your info in Matrix. Help will take you to the informational videos and a manual designed by CoreLogic.

Help Index

Search Help... Search

What's New in Matrix X

Matrix Training Guides

- Matrix 12 Quick Start Guide
- Team Function
- Understanding the categories in the Agent Production and Inventory Report
- Matrix Video Tutorials
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- Speed Bar
- Emailing
- CMA
- Reverse Prospecting
- Matrix Mobile
- Open Houses

Matrix 12 Quick Start Guide

Click to open .pdf Page Count: 78

Additional Matrix resources:
www.corelogic.com/matrix

Matrix 12 Quick Start Guide	
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The 'My Matrix' Menu

Summary – Settings – My Information

- From the Matrix navigation menu, hover the "My Matrix" tab and select "**Summary**". Scroll down below contacts and my listings to select "**Settings**", then "**My Information**".
- My Information: update your roster information as you would like it to appear in the following Matrix features:
 - Information: click the "My Information" link to pre-populate how your contact information will appear in the following Matrix features. Click the "Override" checkbox to override any associated roster information, then click "Save". Anything entered in an **override box will revert to previous info at midnight**. To make any changes permanent, call Member Services to make a change.

HAR Homepage | Education | HAR Connect | Feedback | CoreLogic Live Chat
MY MATRIX | ADD/EDIT | SEARCH | TAX | STATS | MORE
Aa 1 Hello, Melinda ▾

? Enter Shorthand or MLS# x 🔍
Recent Searches ↻

Information
Header & Footer
CMA Cover Sheet
Email Signature
Portal Profile

This page allows you to manage the personal information used by Matrix. For each of the fields below you can either use the value from your roster entry, if there is one, or enter a value manually. **It is recommended that you use the roster value whenever one is available.**

First Name:	Melinda	Override? <input type="checkbox"/>
Last Name:	Burkman	<input type="checkbox"/>
Team Name:	<input type="text" value="HAR Professional Development"/>	
Public Email Address:	<input type="text" value="melinda.burkman@har.com"/>	
Title of Employment:	<input type="text" value="Member Outreach & Training Specialist"/>	
Cell Phone Number:	<input type="text"/>	
Fax Number:	<input type="text" value="713-961-4869"/>	<input type="checkbox"/>
Direct Contact Number:	<input type="text" value="713-629-1900"/>	<input type="checkbox"/>
Agency/Office:	<input type="text" value="Houston Association of REALTORS"/>	
Office Phone Number:	<input type="text" value="713-629-1900"/>	
Office Email Address:	<input type="text"/>	
Office Fax Number:	<input type="text" value="713-961-4869"/>	
Office Mailing Address:	<input type="text" value="3693 Southwest Freeway"/>	
Office City Location:	<input type="text" value="Houston"/>	
Office State Location:	<input type="text" value="TX"/>	
Office Zip Code:	<input type="text" value="77027"/>	
Office Website:	<input type="text" value="http://www.har.com"/>	
Public Contact Number:	<input type="text"/>	
Tag Line: (i.e., Slogan)	<input type="text"/>	
Additional Information:	<input type="text"/>	
Agent Web Page	<input type="text"/>	


Save

- b. Header & Footer: used to brand printed reports, agent webpages and the Client Portal.

Information | **Header & Footer** | CMA Cover Sheet | Email Signature | Portal Profile

Use this page to customize your personal Header which is displayed on your contacts' Portals and also available when you print displays and reports. You can select from a library of standard banner images for your Header, each with a complimentary color scheme for your branding, or upload your own. You can also customize your Print Footer.

Portal Header:



Banner Image: Your current banner image is displayed above. [Select a different banner image/theme](#)
[Upload a custom banner image](#)

Photo: No Photo Use Custom Photo [Change photo](#)

Branding:
 Melinda Burkman
 HAR Professional Development
 Member Outreach & Training Specialist
 Ph: 713-629-1900
 melinda.burkman@har.com

Colors: Use theme defaults Use custom colors


Branding background color: #efd0dc Transparency Level: Slightly Transparent
 Branding text color: #223390
 Branding link color: #231f73
 Banner background color: #efd0dc

[Reset Branding to Defaults](#) [Save](#)

- c. CMA Cover Sheet: manage how you would like your contact information to appear on a CMA cover page. Click on the "Override" checkbox to override any associated prepopulated information, then click "Save".

Information | **Header & Footer** | **CMA Cover Sheet** | Email Signature | Portal Profile

The following fields are used on your CMA Cover Sheet. For each field you can either use the value defined on the Information tab, or override it with a value which is specific to the CMA Cover Sheet.

		Override?
	Name: Melinda Burkman	<input type="checkbox"/>
	Company: Houston Association of REALTORS	<input type="checkbox"/>
	Address Line 1: 3693 Southwest Freeway	<input type="checkbox"/>
	Address Line 2: <input type="text"/>	<input type="checkbox"/>
	City: Houston	<input type="checkbox"/>
	State or Province: TX	<input type="checkbox"/>
	Postal Code: 77027	<input type="checkbox"/>
	Phone: 713-629-1900	<input type="checkbox"/>
	Email: melinda.burkman@har.com	<input type="checkbox"/>
	Office Website: http://www.har.com	<input type="checkbox"/>
	Agent Web Page: <input type="text"/>	<input type="checkbox"/>

[Save](#)

- d. Email Signature: add your photo, text, as well as any links, then click the "Save" button to include this signature on all outgoing messages sent by you, or on your behalf, from Matrix.

Information Header & Footer CMA Cover Sheet **Email Signature** Portal Profile

This page allows you to set your email signature, which is added to the bottom of emails you send from Matrix.

Texas law requires all license holders to provide disclosures to prospective clients. Please read the [Information About Brokerage Services](#) and the [Consumer Protection Notice forms](#).

Melinda Burkman
 HAR- Professional Development
 Member Outreach & Training Specialist
 713-629-1900
[Email me here!](#)
[Agent Website](#)
[Sign up to view premium content!](#)
[Click here to view available pages](#)

Save

- e. Portal Profile: manage the Agent information that you would like to display on your Client's Portal Welcome page. Select features to be shown, then click "Save".

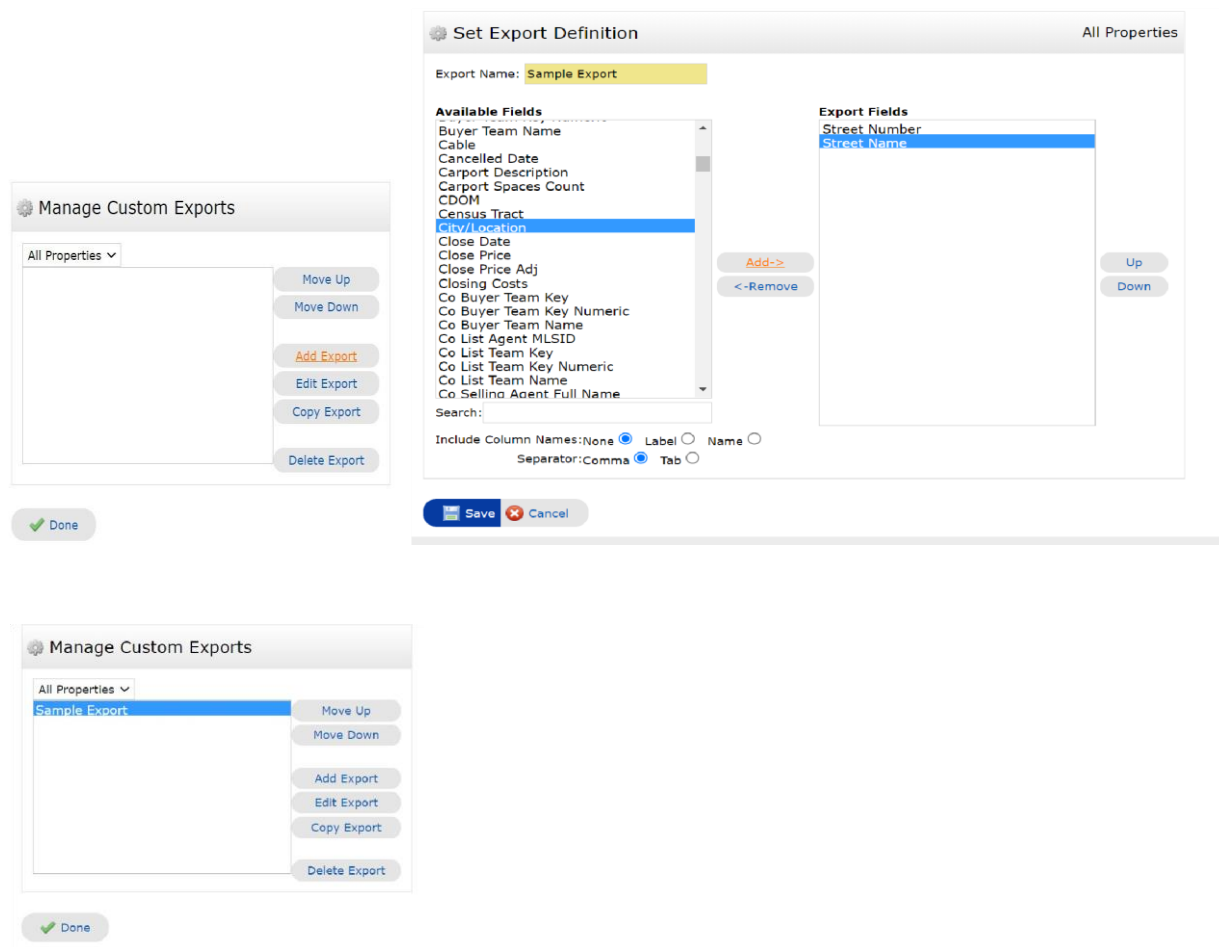
Information Header & Footer CMA Cover Sheet Email Signature **Portal Profile**

Your Portal includes a customizable page named "My Agent" which gives your contacts more information about you. Take the opportunity to stand out! You can turn each of the available sections below on or off, edit the content in them, and drag them into the order you want.

- Photo
- Portal Greeting
- Inventory Slideshow & Links
- Video
- Contact Information

Save

3. My Matrix – Summary- Settings - Speed Bar Shortcuts: manage existing Speed Bar Shortcuts by clicking on your custom shortcut name.
4. My Matrix – Summary- Settings - Team Settings: manage team members by allowing them to create new listings, send CMA's, Reports and emails under your identity or just to work on your behalf.
5. My Matrix – Summary- Settings - Custom Displays: from the "Available Columns" list box, first select which fields you would like to appear on your custom results display, name your custom display, then click "Save".
6. My Matrix – Summary- Settings - Custom Exports: export specific fields of your choosing from your selected listing(s) to a .csv file.
 - a. From the "Manage Custom Exports" page, click the "Add Export" button.
 - b. From the "Available Fields" list box, select which field(s) you would like to export.
 - c. Identify each column in your .csv file by including the field name or label (optional)
 - d. Name your custom export.
 - e. Click "Save".
 - f. Click "Done".



Contacts - Adding

1. From the Matrix navigation menu, hover over the "My Matrix" tab and select "Contacts".
2. Click "Add" on the Button Bar.
3. From the "Personal Information" pop-up, fill out all mandatory fields.
4. Additional option fields can be viewed by clicking the "Show All Fields" link on the Button Bar.
5. Click "Save" on the Button Bar.

Personal Information

Title: Category:

First Name: Last Name:

Email Address: Enter one or more email addresses separated by a comma (,)

Salutation: Dear ,

Phone: Cell:



Contacts - Managing

1. View the number of "Contacts" displayed.
2. Search for contacts by name or by filter.
3. Click the "Expand" icon to open a section panel. Click the "Collapse" icon to close a section panel. Click the "Collapse All" icon to close all subsection panels at once.
4. Manage Contact: Expand to view, or manage, the following items:
 - a) Portal Activity: view a timeline of this contact's most recent Portal activity.
 - b) Portal Searches: view the results of custom searches created and saved in the Client Portal.
 - c) Auto Emails: manage each of the Auto Emails created for this contact.
 - d) Saved Searches: manage each of the saved searches created for this contact.
 - e) CMAs: manage each of the CMAs created for this contact.
 - f) Sent Email: view a collection of recent emails sent to this contact.
5. View the number of listings that are stored in this contact's cart, grouped in their favorites/possibilities/discards folder, or display a collection of sent/received listing notes.

Sherlock Holmes 3/3

Active

Details Auto Email (1) Carts CMA Sent Email (1) Searches Portal Searches Reverse Prospect

Contact Information

Salutation: Dear Sherlock Holmes, Email: medinda.burkman@yahoo.com

Essentials Review

Pre-Approved: No Reverse Prospect: Yes

Notes: Noisy

Favorites: 10 Discards: 1

Recent Activity

Added 1 favorite 01/18/2024

Added 1 favorite 01/18/2024

Added 1 favorite 01/18/2024

Added 1 favorite 01/18/2024

Added 1 favorite 01/18/2024

Added 1 favorite 01/18/2024

Added 1 favorite 01/18/2024

Open Portal Last Visited 01/18/2024

Activity

Favorites 10

Possibilities 8

Discards 1

Notes 8

Saved Searches 8

Saved Searches

1. From the Matrix navigation menu, hover the "My Matrix" tab and select "Saved Searches".
2. Click the Saved Search name you would like to manage and select an action.
3. Click Settings to update your Saved Search name. Assign the search to a specific contact or add/remove it as a Home Page Favorite. Note: a Saved Search can also be turned into an Auto Email.
4. Click "Criteria" to update your Saved Search criteria.
5. Click "Results" to display the results of your Saved Search.
6. Click "Date Since" to display the results of your Saved Search since the last time the search was run.
7. Click "Market Update" to display the results of your Saved Search since the last time the search was run or between a specified date range.
8. Click "Delete" to permanently delete your Saved Search.

The screenshot shows the 'Saved Searches' interface. At the top, there is a search bar and a 'Filter Saved Searches' dropdown. Below this is a table with columns for 'Subject', 'Contact Name', and 'My Last Run'. The table contains three entries:



Subject	Contact Name	My Last Run
77379 250-300		12/15/2016
800-1000 act 2+ 3+ 1500 sqft	Johnson, John	12/08/2016
Energy Corridor 4+ beds		12/14/2016

Below the table, there are buttons for 'Settings', 'Criteria', 'Results', 'Date Since', 'Market Update', and 'Delete'. A detailed view for the selected search shows the following criteria:

- Property Type is 'Single-Family'
- Status is one of 'Active', 'Option Pending', 'Pend Cont to Show', 'Pending'
- Beds Total is 4+
- Year Built is 2005+
- Geo Market Area is 'Energy Corridor'
- Ordered by Status, Current Price

My Matrix CMAs

1. From the Matrix navigation menu, hover the "My Matrix" tab and select "My Matrix CMAs".
2. Click "Start a New CMA" on the button bar.
3. Click "Start" (default position) to select a CMA Contact.
4. Click "Pages" to select from "Available Pages".
5. Click "Subject" to fill Subject Property details from a blank form, a listing number or by searching for a listing.
 - a. Click the Custom Field dropdown list to add an additional field to the Subject Property.
6. Click "Cover" to add your contact information, subject photo, agent information and agent logo to the CMA cover.
7. Click "Comparables" to add comparables from a search or from a cart.
8. Click "Map" to include a map that displays the location of comparables in relation to the subject property.
9. Click "Adjustments" to adjust a comparable's feature value.
10. Click "Pricing" to view a Summary of Comparable Prices and Adjusted Comparable Prices.
11. Click "Finish" for a "CMA Summary" and to view or email your completed CMA.

Start Pages Subject Cover Comparables Map Adjustments Pricing Finish  

Autosaved at 12/27/2016 7:55:42 AM

Select CMA Contact

Welcome to the CMA Wizard. Use this Start page to select your Contact. Use the above Navigation Bar to navigate through the steps.


Select Contact Name: [Create a New Contact](#)

Description:

Please Note: This CMA will be saved for 180 days from the Last Modified date and then automatically be deleted. If you need to keep it longer, modify the CMA before the end of the 180 day period or save a copy of the generated PDF to your computer (you should do that anyway).

The 'Add/Edit' Menu

From the Add/Edit menu, click Matrix Add/Edit. From there you can select to Add New or Edit Existing Listings. Listings can also be edited from the My Listings widget on the Dashboard screen of Matrix.

 Input

Listings


[Add new or Edit existing Listings](#)

Quick Modify:
 or type [Edit](#)

Roster

[Add new or Edit existing Agent Roster](#)
 Quick Modify:
 [Edit](#)

[Add new or Edit existing Office Roster](#)
 Quick Modify:
 [Edit](#)

 Add New Listing

Select Form

- [Single-Family Add/Edit](#)
- [Townhouse/Condo Add/Edit](#)
- [Lots Add/Edit](#)
- [Multi-Family Add/Edit](#)
- [Country Homes/Acreage Add/Edit](#)
- [Mid/Hi-Rise Condo Add/Edit](#)
- [Rental Add/Edit](#)
- [Private Per Seller Add/Edit](#)
- [Global Add/Edit](#)

 Cancel

To apply tax record information, choose the county, street number and name for the address you would like to list.

+ Add a New All Properties Listing

[Auto-Pop From Realist Tax](#)
[Copy from Existing Listing](#)
[Start with a blank Listing](#)

Search for pre-existing Tax Record from which to Fill

Tax Search

County (Required)	Tax ID	<input type="text"/>
<input type="checkbox"/> Comal	Owner First Name	<input type="text"/>
<input type="checkbox"/> Comanche	Owner Last Name	<input type="text"/>
<input type="checkbox"/> Concho	Street Number	<input type="text" value="1234"/>
<input type="checkbox"/> Cooke	Street Name	<input type="text" value="Spomething"/>
<input type="checkbox"/> Coryell	City	<input type="text"/>
<input type="checkbox"/> Cottle	Unit Number	<input type="text"/>
<input type="checkbox"/> Crane		
<input type="checkbox"/> Crockett		
<input checked="" type="radio"/> Or <input type="radio"/> Not		

Confirm you have the right listing by double checking the street name spelling, county and owner name. If everything is correct, choose "Fill". If the information is not correct or you are not viewing the tax records for your listing, click 'Cancel'.

+ Add a New All Properties Listing

[Auto-Pop From Realist Tax](#)
[Copy from Existing Listing](#)
[Start with a blank Listing](#)

Search for pre-existing Tax Record from which to Fill

	APN	PROPERTY ADDRESS	PROPERTY CITY
<input type="button" value="Click to Fill"/>	090-388-000-0011	1234 something	Houston
<input type="button" value="Fill"/>			

On this screen, you will work through each stage of the ribbon at the top, filling in as much information as you have on your listing. When you click the 'Validate' button on the bottom ribbon, it will mark any required fields that are blank with a red triangle and exclamation point to call to attention to the blank field. Those flagged fields must be filled in before the listing can be active. Use the Input sheets in the external links widget to collect info on your listing before starting this step, take the document to a listing appointment with client and get all the that you need in a timely manner. Once you have all the needed info, you have some options to choose from at the bottom. You may 'Submit Listing' to have the listing go active. You may 'Save as Incomplete' if the listing is not ready to be viewed or you possibly need to find more information. You can also select 'Cancel Input' if this was a practice session or if you want to start over.

Single-Family Add/Edit

Status Listing Information Map Information Property Information Rooms Financial Information Showing Information Remarks/Tour Links Review

Listing Information

List Type	List Price	List Date	Expiration Date
Also For Lease	Priced at Lot Value Only		
Street Number 12326	St Direction	Street Name (Max 50 Characters) Mullins	Street Type Drive
City/Location Houston	State Texas	Zip Code 77035	Zip Code Ext 5528
Subdivision Westbury South	Section #	County Harris	Country United St.
Legal Description LT 11 BLK 137 WESTBURY SOUTH	Legal Subdivision	Lookup Subdivision	
Master Planned Community Y/N	Master Planned Community Name		
Tax ID # 090-388-000-0011	Key Map 571E	Census Tract 4221.00	School District
Tax ID # 2	Tax ID # 3		

Save as Incomplete Validate Cancel Input Submit Listing

Scheduling Appointments Using ShowingSmart

HAR
com

MY MATRIX
ADD/EDIT
SEARCH
TAX
STATS
MARKET REPORTS
FINANCE
LINKS
INTRAMAT

? Enter Shorthand or MLS#

+ Single-Family Add/Edit

Info
Listing Information
Map Information
Property Information
Rooms
Financial Information
Showing Information
Remarks/Tour Links

Showing Information
MLS Number: 10699451

<p>Agent Name Melinda Burkman</p> <p>Ph: 713-629-1900</p> <p>Email: melinda.burkman@har.com</p> <p>List Team ---</p> <p>Agent Name</p> <p>Ph:</p> <p>Email:</p> <p>Appointment Phone 713-790-0427</p> <p>Appointment Phone Desc ShowingSmart Ca</p> <p>Night Phone</p> <p>Office Phone Ext</p> <p>Fax Phone</p> <p>Allow Online Appointments via Matrix: Yes</p> <p>Directions - Please provide directions to the property from the closest major RD or HWY.</p> <div style="background-color: #ffff00; height: 40px; width: 100%;"></div> <p>Characters Remaining: 500</p>	<p>Brokerage Name Houston Association of REALTORS</p> <p>Ph: 713-629-1900</p> <p>Brokerage Name Houston Association of REALTORS</p> <p>Ph:</p> <p>Showing Instructions</p> <ul style="list-style-type: none"> <input type="checkbox"/> Accompany <input type="checkbox"/> Appointment Required <input type="checkbox"/> Call Occupant <input type="checkbox"/> Controlled Access <input type="checkbox"/> Leave Business Card <input type="checkbox"/> Lockbox Back <input type="checkbox"/> Lockbox Front 	<p>Find a List Agent BurkmanM Refresh</p> <p>List Team ID Find <input type="text"/> Refresh</p> <p>Find Co List Agent <input type="text"/> Refresh</p> <p>Licensed Supervisor <input type="text"/> ?</p> <p>Agent Alternate Phone <input type="text"/> ?</p> <p>Alternate Phone Desc <input type="text"/> ?</p> <p>IDX Contact Info:</p>
--	--	---

Save as Incomplete
 Validate
 Cancel Input
 Submit Listing

Showing information needed for ShowingSmart--Appointment Phone Number: 713-930-0427 and Appointment Phone Description: ShowingSmart Call Center. Click on "Save as Incomplete" or "Submit Listing" if you are prepared for your listing to be active.

The screenshot shows the HAR.com interface. At the top, there is a navigation bar with links: MY MATRIX, ADD/EDIT, SEARCH, TAX, STATS, MARKET REPORTS, FINANCE, LINKS, INTRAMATRIX. On the right, it says "Hello, Melinda" with a dropdown arrow. Below the navigation bar is a search bar with the placeholder "Enter Shorthand or MLS#" and a magnifying glass icon. To the right of the search bar is a "Recent Searches" button with a refresh icon. Below the search bar is a message box with a green checkmark and the text "Input Succeeded". The message says: "Your Listing has been successfully saved as Incomplete. MLS Number: 10699451". Below the message are links for "Add Showing Instructions to ShowingSmart", "HAR.AI Property Description", "HAR.AI Highlights", and "HAR.AI Photo Descriptions". At the bottom of the message box are buttons for "Continue Editing", "Add / Edit Photos", and "Add / Edit Attachments".

After you have saved as Incomplete or submitted it as Active, click “Add Showing Instructions to ShowingSmart”.

The screenshot shows the "Setup Showing Instruction" form for listing 6442 Wilshire Lakes. The listing details include: Type: Single-Family, Listing Agent: Richard Aguilar, MLS Number: #28504278, and Status: INCOMPLETE. The form is divided into several sections: "Showing Details" with dropdowns for Approval Type (Please Select One), Home Status (Status is Unknown), and Showing Start Date (mm/dd/yyyy); "Showing Agent Instructions" with a text area; "Showing Preferences" with dropdowns for Minimum hours before Showing (No Restriction), Maximum Appointment Length (1 Hour), and radio buttons for Allow Overlap Showing?, Show all available times to showing agent?, Accompanied showing?, and Send Notify TXT if Showing Completed Early?; "Alarm" with radio buttons for Alarm System (Yes/No); "Contacts (Approval, Notifications, Feedback)" with a contact card for Richard Aguilar (Listing Agent) showing notification methods (Email, TXT) and types (Receive Showing Approval Requests, Receive Showing Status Notifications, Receive Showing Feedback); "Temporary Notes" with an "Add Temporary Note" button; "Showing Block" with an "Add New Showing Block" button; and "Private Notes" with a text area for private instructions.

This will bring you to the ShowingSmart platform where you can enter your showing instructions. Don't forget to save it in the bottom left corner once complete.

Previous		Next		1-16 of 16		Checked 6		All - None - Page		Display		my:Agent Single Li		at 25		per page		Results	
#	TX	MLS #	Stat	AR	Office	Address	Subdivision	Appointment Phone	Phone Appt Desc	Class	SF	Price							
<input checked="" type="checkbox"/>	1	TX	A	11	WDWR01	9323 Guywood Street	Woodland Trails N 1	832-853-3770	Text Agent		1,198	\$219,999							
<input checked="" type="checkbox"/>	2	TX	A	11	SPSO01	8810 Arbor Wood Drive	Woodland Trails	713-773-9300	Text Agent		1,766	\$229,900							
<input checked="" type="checkbox"/>	3	TX	A	11	WDWR01	9501 Yanwood Street	Woodland Trails North Sec 0	832-853-3770	Text Agent		1,469	\$249,999							
<input checked="" type="checkbox"/>	4	TX	A	11	KWKT01	7042 Wood Bluff Boulevard	Woodland Trails West Sec 01	713-977-7469	ShowingTime		1,428	\$250,000							
<input type="checkbox"/>	5	TX	A	11	KWKT01	7030 Wood Bluff Boulevard	Woodland Trails West 01 U/I	713-977-7469	ShowingTime		1,374	\$250,000							
<input type="checkbox"/>	6	TX	A	11	CAPH01	8207 Tiger Lane	Rolling Fork Sec 03	800-746-9464	ShowingTime		2,205	\$299,950							
<input type="checkbox"/>	7	TX	A	11	EXPD01	8119 Clarion Way	Woodwind Lakes Sec 4	713-930-0427	ShowingSmart Call Center (HAR)		2,016	\$349,900							
<input type="checkbox"/>	8	TX	A	11	EXPD01	9531 Kindletree Drive	Candlelight Forest West	281-235-8838	ShowingSmart Call Center (HAR)		2,990	\$365,000							
<input type="checkbox"/>	9	TX	A	10	kwpt01	15514 Congo Lane	Jersey Village Country Club	713-977-7469	ShowingTime		2,674	\$365,000							
<input checked="" type="checkbox"/>	10	TX	A	10	RMNW01	16406 Cornwall Street	Jersey Village	800-746-9464	ShowingTime		2,670	\$369,000							
<input checked="" type="checkbox"/>	11	TX	A	10	RTOPO1	15810 Juneau Lane	Jersey Village	713-930-0427	ShowingSmart Call Center (HAR)		3,533	\$444,000							
<input type="checkbox"/>	12	TX	A	10	HAGLO1	8626 Wyndham Village Drive	Wyndham Village	713-977-7469	ShowingTime		3,262	\$479,999							
<input type="checkbox"/>	13	TX	A	10	KWHM01	15422 Mauna Loa Lane	Jersey Village	713-977-7469	ShowingTime		3,606	\$650,000							
<input type="checkbox"/>	14	TX	A	10	CBAR01	16320 Lewis Street	Jersey Village Cc Estates Se	713-930-0427	ShowingSmart Call Center (HAR)		3,970	\$699,000							
<input type="checkbox"/>	15	TX	A	10	NXRC01	15310 Clevedon Lane	Jersey Village	713-977-7469	ShowingTime		4,762	\$765,000							
<input type="checkbox"/>	16	TX	CS	11	RELM06	8119 Silverton Creek Lane	Stoneyway Village Rep 01	713-977-7469	ShowingTime		2,232	\$305,000							

To schedule an appointment through ShowingSmart or create a property tour, select the listings in Matrix. Click the ShowingSmart button in the Action ribbon, to begin.

Showing Smart Home Listings Showings Tours Buyers Reports Support

How would you like to proceed?

You have selected 6 listing(s).

Request Showings for These Listings >

Create a Tour for These Listings >

Terms of Use | Privacy Policy

Select "Request Showings for These Listings".

All listings default to a ShowingSmart interface if the listing is not using a service provider. Please make sure to wait for confirmation!

Now, all your appointments will be in one database for you to go and show your buyers.

Creating a Map Tour Using ShowingSmart

The screenshot shows the HAR.com interface with a list of real estate listings. A red box highlights the 'ShowingSmart' button in the bottom right corner of the listing table. The table columns include: #, TX, OH MLS #, Stat, AR, Office, Address, Phone Appt Desc, Front Door Faces, DPR, and Subdivision. Several rows are checked, including listing #3 (54492064) and #8 (71822088).

#	TX	OH MLS #	Stat	AR	Office	Address	Phone Appt Desc	Front Door Faces	DPR	Subdivision
1	<input type="checkbox"/>	2685675	A	22	SEYE01	3201 JEANETTA Street	Text Agent	West		CARVER CREST
2	<input type="checkbox"/>	31471674	A	25	LHVB01	31714 Harmony High Lane	Call Agent			Stone Creek Ranch
3	<input checked="" type="checkbox"/>	54492064	A	25	NANP01	5111 Bluebird Song Lane	ShowingSmart Call Center (HAR)			Marisol
4	<input type="checkbox"/>	26812125	A	6	OPBR01	1605 Brenda Lane	ShowingTime			Stadium Estates Sec 02
5	<input type="checkbox"/>	51282785	A	72	BEAL01	707 W Evans Streets	Text Agent	East		Hearne
6	<input type="checkbox"/>	29947182	A	37	DFHR01	26006 Golden Dawn Trail	On-Site Sales Office	South		Candela
7	<input type="checkbox"/>	21368206	A	38	RMFP01	10731 Verdant Hill Drive	On-Site Sales Office			Sienna 50'
8	<input checked="" type="checkbox"/>	71822088	A	15	EXPD01	10522 Crystal Cove Drive	ShowingSmart Call Center (HAR)	South		Lake Windcrest 04
9	<input type="checkbox"/>	40568587	A	51	EMJW01	1933 Oak Avenue	Owner			Rose Farm
10	<input type="checkbox"/>	7483960	A	30	LHVB01	3019 Ranch Gate Lane	Call Agent			Miller's Pond
11	<input checked="" type="checkbox"/>	45104185	A	43	EXPD01	12 Lakeview Lane	ShowingSmart Call Center (HAR)			HUNTSVILLE AREA
12	<input type="checkbox"/>	40118825	A	30	LHVB01	3014 Ranch Gate Lane	Call Agent			Miller's Pond
13	<input type="checkbox"/>	82205916	A	33	JTRI01	27 South Shore Drive	Office			South Shore
14	<input type="checkbox"/>	25961741	A	42	WALZ08	112 Coral Gables	ShowingSmart Call Center (HAR)			Westwood Shores Sec 3
15	<input type="checkbox"/>	68108112	A	30	LHVB01	3019 Live Springs Court	Call Agent			Miller's Pond
16	<input type="checkbox"/>	SA1749408	A		SA-KUPEOC	101 EL CIELO	ShowingTime			ESPERANZA - KENDALL COL
17	<input type="checkbox"/>	94755866	A	19	HHOM01	979 Terlingua Creek Drive	Office			Grand Central Park
18	<input type="checkbox"/>	SA1749406	A		SA-HOMTD	6310 BLACK BEAR	ShowingTime			Alamo Ranch
19	<input type="checkbox"/>	SA1749405	A		SA-PRSL00	3449 Whisper Haven	ShowingTime			WHISPER MEADOW

Click the ShowingSmart button to begin.

The screenshot shows the ShowingSmart interface with a dialog box titled "How would you like to proceed?". The dialog contains the text "You have selected 6 listing(s)." and two buttons: "Request Showings for These Listings" and "Create a Tour for These Listings". The "Create a Tour" button is highlighted in yellow.

HAR.AI Feature P Exclusively for Platinum Subscribers

After your listing is entered in Matrix, you can use the Platinum feature HAR.AI to polish your physical property descriptions. First, enter your listing in Matrix. Then, search Har.ai in the Members Only Portal. There you will see your listing and can use the AI tool to perfect your listing description. Go to this url for a demo video! <https://cms.har.com/har-ai-propertydescription/>

The screenshot shows the 'Members Only Portal' interface. On the left is a dark blue sidebar with navigation icons for Dashboard, MLS, Tools, My Account, Leads / Appt, Training, and Inside HAR. The main content area has a search bar with 'Where to search' set to 'Members Area' and 'Search' set to 'har.ai'. A pink 'SEARCH' button is to the right. Below the search bar, a notification says 'Search For 'har.ai' Found 1 Result' with a link to 'AI - Property Description'. A card for 'Marketing Center' is visible with the text 'Reach your audience with our marketing and prospecting tools'. Other cards include 'What's new' with 'HAR Delivers FREE Industry News to You', 'Showing Smart' with 'ACCESS SHOWINGSMART' and 'Your Showing Code: 794866', and a support section with 'ACCESS MATRIX MLS', 'Verify Your Information', 'Tutorial videos', 'Matrix training', and contact numbers for Matrix, SUPRA, and HAR.com.

The screenshot shows the 'HAR AI - Property Description' page. The sidebar is the same as in the previous screenshot. The main header features the HAR AI logo and the title 'HAR AI - Property Description'. Below the header, a pink 'P' icon indicates 'Exclusively for Platinum Subscribers'. The text reads: 'Generate AI-driven property descriptions for your listings then seamlessly promote them via Social Media, email or text. [Learn More](#) →'. Under the heading 'MY ACTIVE LISTINGS', there is a search input field with a magnifying glass icon and the placeholder 'Enter Address, MLS#', and a dropdown menu currently set to 'Price - Descending'.

The 'Search' Menu

Criteria Search

From the Search menu, there are options to search for properties of each type using a Quick or Classic style search or our new modern search experience.

The screenshot displays the HAR.com interface. At the top, a dark blue navigation bar contains the HAR.com logo and several menu items: MY MATRIX, ADD/EDIT, SEARCH, TAX, STATS, MARKET REPORTS, FINANCE, and LINKS. The 'SEARCH' menu is currently open, showing a list of search options: Search (New), Single-Family, Quick Single-Family, Townhouse/Condo, Lots, Multi-Family, Country Homes/Acreage, Mid/Hi-Rise Condo, Rental, Quick Rental, Private Per Seller, Global, All Properties, Matrix Tax, Agent, Quick, Office, and More... To the right of the search menu, a vertical sidebar contains several blue buttons: Listing Data Checker, Market Watch, My Carts, My Favorite Searches, My Listings, My Stats, Recent Use Contacts, Recent Portal Visitors, and Search. Below the navigation bar, there is a search input field with a question mark icon and the placeholder text 'Enter Shorthand'. The main content area is divided into three sections: 'News & Alerts' with four recent articles, 'Additional' with a message 'There are no additional widgets.', and 'Concierge' with a message '7 Listings need your approval:' and a listing 'Holmes, Sherlock (7)'.

Matrix New Search Interface

Matrix's all-new search interface is designed to be fully responsive no matter what size screen you are using. The new search provides an intuitive and efficient user experience across a wide range of screen resolutions and devices, including mobile phones, tablets, and computers. At desktop resolutions, the new search uses a three-panel design that shows the search criteria, map, and search results simultaneously, and it switches to a touch-friendly layout at mobile resolutions.

The screenshot displays the HAR.com search interface. At the top, the navigation bar includes the HAR.com logo, menu items like 'MY MATRIX', 'ADD/EDIT', 'SEARCH', 'TAX', 'STATS', 'MARKET REPORTS', 'FINANCE', and 'LINKS', and a user greeting 'Hello, Melinda'. The search bar contains the criteria 'CP CS ACT PSHO 77450' and includes options for 'Include other criteria' and 'Recent Searches'. The search results are filtered for 'Single-Family' properties, with a title 'Single-Family Zip Code is like '77450...' and '76 matches'. A map of the Katy area shows the search results as green pins. The results table is as follows:

#	Property Type	AR	Office	Address	Subdivision	Lot Size	SF	Price	Prc/SF	Year
1	A Single-Family	36	LGRE01	610 Aldersgate Court	Nottingham Country Sec 01 R/P	7,875	3,262	\$400,000	\$122.62	1973
2	A Single-Family	36	LIST01	20006	Kelliwood	10,112	8,677	\$1,635,000	\$188.13	1980

Quick Criteria Badges-

New quick criteria badges make it easy to navigate to a specific field and edit the criteria, or to instantly delete an unwanted search term. At desktop resolutions, the title area of the search now displays interactive badges of the current search criteria instead of the old text-only description. Click any badge to jump to that field in the criteria form or click the "x" to remove it from the search. You can expand and shrink the badge area if there are more badges than can fit on a single line.

The screenshot shows a real estate search interface. At the top, a blue header contains search criteria badges: "4 matches", "Coming Soon", "Active", "Price (List & Sold) is 300k to 500k", "1960/cypress", "Beds is 3 to 4", and "Baths is 3 to 4". Below the header is a map of a residential area with various subdivisions labeled. Below the map is a table of search results for "My Single-Family" properties.

#	Property Type	Office	Address	Subdivision	Lot Size	SF	Price	Prc/SF	Year Built	Beds	Bth	OH	Phone Appt Desc
1	A Single-Family	WDR01	13110 Brayton Court	Wortham Grove Sec 4	7,144	3,054	\$475,950	\$155.84	2001	4	3/1		Text Agent
2	A Single-Family	OFFP01	12807 Jubilee Park Court	Crossroads Park	11,047	2,914	\$409,900	\$140.67	1994	4	3/0		ShowingTime
3	A Single-Family	KLWP01	12043 Miramar Shores Drive	Windermere Lakes Sec 03	7,920	3,147	\$429,000	\$136.32	2000	4	3/1		ShowingSmart Call Center (HAR)
4	A Single-Family	CDNI01	10318 Sand Dollar Drive	Windermere Lakes Sec 01	9,801	3,064	\$485,000	\$158.29	2001	4	3/1		ShowingSmart Call Center (HAR)

Quick Search

The Quick Search organizes the data points into easy to find sections. In this version, you will enter search criteria, then change to map view to see where your results are and Results tab to see a line-item display of each of your results.

HAR.com MY MATRIX | ADD/EDIT | SEARCH | TAX | STATS | MARKET REPORTS | FINANCE | LINKS

Enter Shorthand or MLS#

★ Try Our New Search

Criteria | Map | Results

Quick Single-Family

Status

Select All | Select None

- Coming Soon
- Active
- Option Pending
- Pend Cont to Show
- Pending
- Sold
- Withdrawn
- Expired
- Terminated

Price and DOM

Price (List & Sold) (000s)

DOM

CDOM

Property Information

Sq Foot | Beds

Lot Size | Full Baths

Year Built | Half Baths

of Garages | Stories

New Construction | Private Pool

Location Information

Map Search: No Map Selected

Within miles of My Location

*(Use * as a wildcard, e.g., *-garden* will find Old Garden and Gardenbrook)*

St #	Street Dir	Street Name	Unit	Street Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

City/Location | Zip Code

Country | School District

Clear 5000+ matches | Map | Results

Subdivision

Master Planned Community Or Not

Geo Market Area Or Not

Area Or Not

Legal Subdivision Or Not

Misc

Houston Association of Realtors
 San Antonio Board of Realtors

Days Back - Hot Sheets

Change Type

- New Listing
- Back On Market
- Price Decrease
- Price Increase
- Active
- Option Pending
- Pending Continue to Show
- Pending
- Sold
- Coming Soon
- Leased
- Withdrawn
- Expired
- Terminated

Classic Search

The Classic Search is going to look similar to Matrix tax and several of our statistical reports in Matrix. Similar to the quick search, you will enter your search criteria and then toggle to the map and results screen to see the listings.

Criteria
Map
Results

MLS #

Status - Date or Range
[Select All](#) [Select None](#)

Coming Soon

Active

Option Pending

Pend Cont to Show

Pending

Sold

Withdrawn

Expired

Terminated

Buyer Contingent

Property SubType

Duplex

Free Standing

Historic

Manufactured

Patio Home

And Or Not

Style

Barndominium

Colonial

Contemporary/Modern

Craftsman

English

And Or Not

Interior

2 Staircases

Alarm System - Leased

Alarm System - Owned

Atrium

Map Search: No Map Selected

Within miles of [My Location](#)

St #	Street Dir	Street Name	Unit	Street Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[More](#)

Area

1

2

3

4

5

Or Not

Geo Market Area

1960/Cypress

1960/Cypress Creek Nort

1960/Cypress Creek Sou

Aldine Area

Alief

Or Not

City/Location

Or Not

Subdivision

Legal Subdivision

School District

1 - Aldine

2 - Alief

3 - Alvin

4 - Anahuac

5 - Angleton

Or Not

Master Planned Community

Aliana

Price

(000s)

Beds

Full Baths

Half Baths

Sq Foot

Lot Size

Year Built

of Garages

Garage Desc

Attached Garage

Attached/Detached Gara

Detached Garage

Oversized Garage

Tandem

And Or Not

Carport Desc

Attached & Detached

Attached Carport

Detached Carport

Acres

0 Up To 1/4 Acre

1/4 Up to 1/2 Acre

1/2 Up to 1 Acre

1 Up to 2 Acres

2 Up to 5 Acres

Or Not

Stories

Private Pool

Clear 5000+ matches
Map
Results

Numeric Fields

The price defaults to include the trailing zeros (aka thousands of dollars):

Use the + and – symbols to build search criteria:

If the search is for \$200,000	Enter 200
If the search is for \$200,000 and over	Enter 200+
If the search is for \$200,000 and below	Enter 200-
If the search is for \$200,000 - \$300,000	Enter 200-300

If the search is for 3 or more bedrooms	Enter 3+
If the search is for exactly 3 bedrooms	Enter 3
If the search is for 3 to 5 bedrooms	Enter 3-5
If the search is for 3 or fewer bedrooms	Enter 3-

Search Symbols and Wildcards

In fields where text is entered instead of choosing an item off a list (such as Subdivision), wildcards may be entered.

* is the wildcard symbol

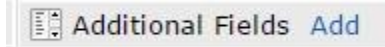
! is the negative symbol

Begins With- if the search is for: Garden Oaks [anything] i.e. Garden Oaks Section 1, Garden Oaks Section 2	Enter Garden Oaks*
Ends With- If the search is for [anything] Oaks i.e. Garden Oaks, Bay Oaks, River Oaks	Enter *Oaks
Contains- If the search is for: [anything] Oaks [anything] i.e. Bay Oaks Section 1, Garden Oaks Section 2	Enter *Oaks*

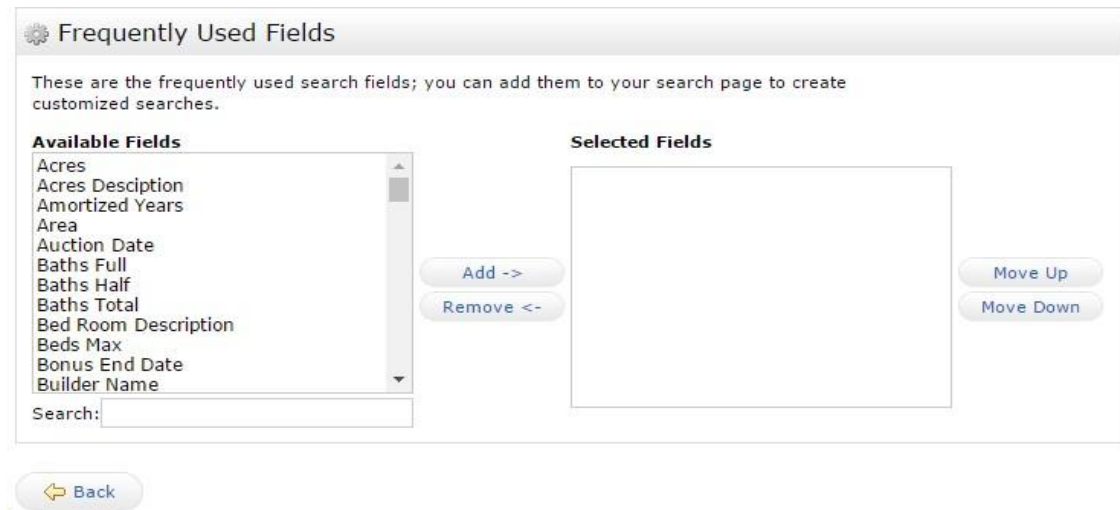
Not- If the search is for: anything but exactly Garden Oaks i.e. Garden Oaks Section 1, Garden Oaks Section 2, but not Garden Oaks	Enter !Garden Oaks
Does Not Contain- If the search is for: anything without Oaks i.e. Garden Villas but not Garden Oaks	Enter !*Oaks*

Additional Fields

If there is a need to search by a field that is not on the main search screen, it can be added by using the Additional Fields option.



When Add is selected, the Frequently Used Fields window presents fields available to be added.



When a field is highlighted and the Add button is selected, it becomes a Selected Field. When the Back button is selected, that field will appear under Additional Fields.



Managing Attachments on a Listing

You may need to add content to a listing after you have submitted it as active or incomplete. One case is if you use the CubiCasa app to make a visual of a home's floorplan.

You can download the CubiCasa app from your chosen app store and use the app to make a 2D visual of your listing's floor plan.



Once you have a pdf of the home's floor plan, you will go back into Matrix to attach it to your listing documents. Choose **Add/Edit** from the toolbar and "**Edit existing**" listing or search a listing by MLS #.

+ Input

Listings

Add new or [Edit existing](#) Listings

Quick Modify:

--MLS#-- [Edit](#)

Choose **Manage Attachments** and add your pdf as a **public floor plan**.

How to add a floorplan?
Add/edit- Quick Modify or Edit listing

Map Search

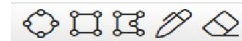
The Map can be accessed by selecting the Map tab from either the Search/Criteria screen or the Results screen.

The screenshot displays a real estate application interface. At the top right, there are three tabs: 'Crit' (Criteria), 'Map', and 'Results'. A red arrow points to the 'Map' tab. Below the tabs are three filter panels:

- Status:** Includes checkboxes for 'Active', 'Option Pending', and 'Pend Cont to Show'.
- Price and DOM:** Includes input fields for 'List' and 'Sale' prices, with '(000s)' indicators.
- Property Information:** Includes input fields for 'Sq Foot', 'Lot Size', 'Beds', and 'Full Baths'.

Below the filters is a map view of Houston, Texas, showing various neighborhoods like 'NEAR NORTHSIDE' and 'GREATER FIFTH WARD'. The map is populated with numerous green and orange property markers. At the bottom of the map, there is a toolbar with options like 'Actions', 'Refine', 'Save', and 'Carts'. Below the map, there is a navigation bar with icons for 'Criteria', 'Email', 'Print', 'CMA', 'Directions', 'Stats', 'Export', 'Quick CMA', 'Cloud CMA', and 'Text Listings'.


An area can be searched by selecting the Radius, Rectangle, Polygon or Freehand Polygon tools. Erase all shapes with the erasure tool

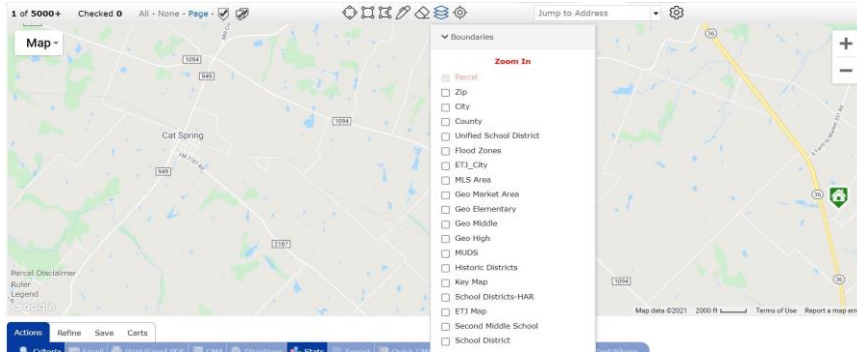


The shape can now be used to define the search area (Include this Shape) or exclude a specific area from the search results (Exclude this Shape). Delete Shape will remove the user-defined shape from the map.

The resulting listings will be limited by the area(s) selected on the map. Note: More than one shape may be used. Also, there can be a shape within a shape (i.e. limited to a certain area, minus a few streets).

Map Layers

Customize map views by choosing from several layers of geographic information. Each layer can be displayed individually or mixed with others to create the perfect map to meet your needs. Use the Layers icon to choose from the options. 



Use the compass icon to recenter your map to your results. 

Speed Bar Search

Throughout Matrix, the Speed Bar populates at the top of the screen.



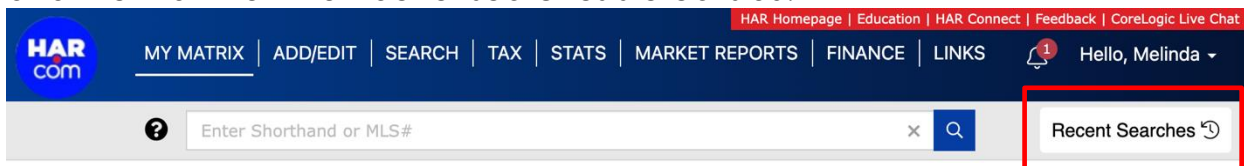
The primary uses for the Speed Bar are:

- MLS Number Search
- Address Search
- Agent Search
- Office Search
- Open House Search

However, the Speed Bar can be used for several different search criteria options. Click the Question Mark icon for Speed Bar shortcuts.

Recent Searches

From both the Home screen and the Search screen, when the down arrow next to Recent Searches is selected, your most recent Matrix searches are displayed. The system will keep searches in the Recent Searches for no more than a week, and the maximum number of searches stored is 50.



Working with Results

As criteria are entered on the search screen, the number of results is reported in the bottom left side of the screen.



When the Results tab is selected, properties are displayed on the Results Grid.

Icons

On the left of the Results Grid, icons can be selected for more information.



The first checkbox is to Select a listing.



This icon allows you to view photos of the listing.



This icon will show the property on a map.



This icon links to the Realist Tax data for the listing.



This icon will show the Property History report.



This icon opens attachments or documents for the listing.

Note: If an icon is not applicable to the listing, it might not appear. For example, if there are no attachments uploaded, the attachment icon will not be placed on that listing.

The Button Bar



The Actions Tab -Email

On the results screen, when listings are selected, they can be emailed using the Email action in the lower left of the screen.

The email will be sent when the agent adds a recipient, a subject and a message and selects Send.

Email 25 Listings

From: "Cristina Schaefer" <crisrina@har.com>

To:

CC:

[Create a New Contact](#)

Bcc me a copy of this message.

Display: All customer displays are automatically available to your contact.

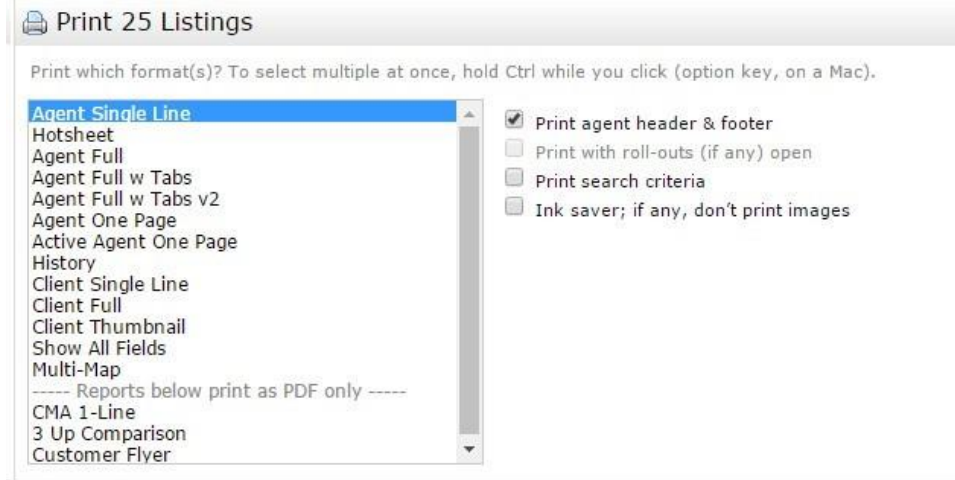
Subject:

Email Body:

Characters Remaining: 4000

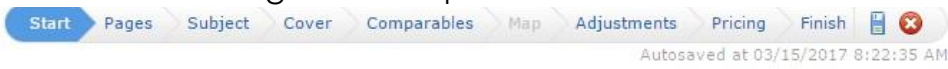
Print

From the Print dialog box, a report can be selected and printed.



CMA

Once you click CMA, use the navigation bar at the top of the screen as your guide. Following the steps in the order they are listed will guide users through the process of creating a CMA report.



Select CMA Contact

Welcome to the CMA Wizard. Use this Start page to select your Contact. Use the above Navigation Bar to navigate through the steps.

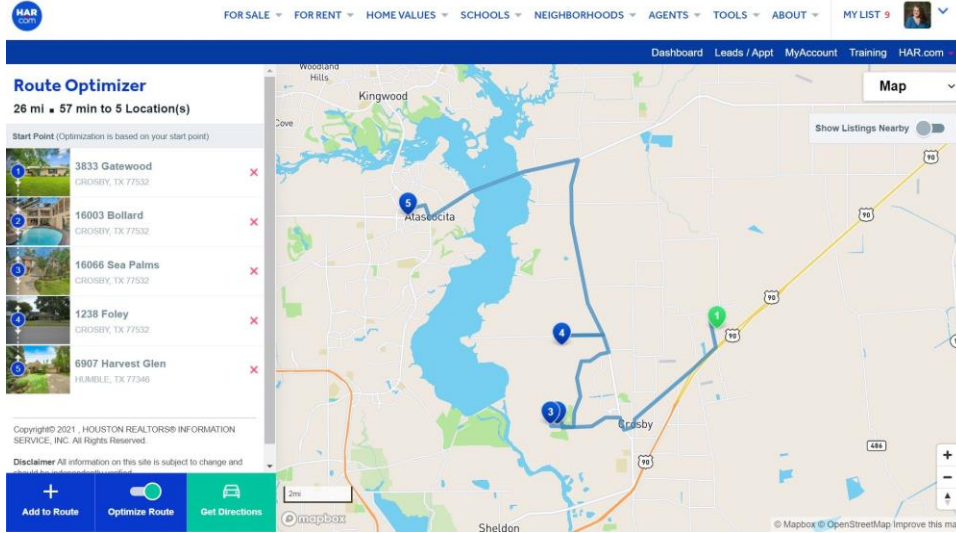
Select Contact Name: Create a New Contact

Description:

Please Note: This CMA will be saved for 180 days from the Last Modified date and then automatically be deleted. If you need to keep it longer, modify the CMA before the end of the 180 day period or save a copy of the generated PDF to your computer (you should do that anyway).

HAR Directions

The desired properties can be checked, then Directions selected. The listings can be dragged and dropped into the desired order or removed by clicking the **x**.



The Add to Route button can be used to add points that are not listings (i.e. the agent's office). These directions can be emailed, texted and printed.

Stats

Once the stats report is selected, it will display a tubular-style report chart.

Market Analysis

Status: Active (5)

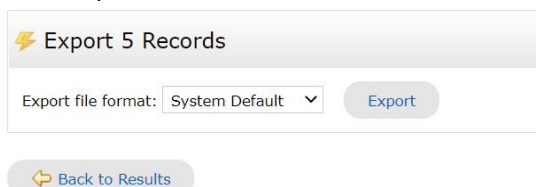
Property Type: Single-Family (5)

	SqFt	BD	FB	HB	Yr Built	Acres	Lot Size	List Price	LP/SqFt	LP/Acre	Sale Price	Close Price Adj	SP/SqFt	Price Sq Ft Adj Sold	SP/Acre	SP/LP%	SP/OLP%	DOM	CDOM
Min	2,052	3	2		1976	0.28	12,223	\$365,000	\$116.87	\$99,975.00	-	-	-	-	-	-	-	-	-
Max	3,123	5	3	1	1996	4.00	174,240	\$450,000	\$219.30	\$1,425,516.75	-	-	-	-	-	-	-	38	38
Avg	2,496	4	2	1	1984	1.31	56,933	\$395,980	\$163.57	\$629,531.93	-	-	-	-	-	-	-	16	23
Median	2,435	3	2	1	1984	0.66	28,574	\$399,900	\$164.27	\$556,402.44	-	-	-	-	-	-	-	18	23

[Back](#)
[Print/Email PDF](#)


Export

On the results screen, when listings are selected, they can be exported on to an Excel spreadsheet.




Quick CMA

The Quick CMA will compare listings in a chart-style format. This PDF can be printed or downloaded to a computer.



Marilyn Maxwell - CREI, ITI
 marilyn@har.com
 Ph: (713) 629-1900 x 1288
 Houston Assn of REALTORS



Property Type is 'Single-Family' Status is 'Active' Current Price is 350000 to 450000 Beds is 3+ Baths Full is 2+ Pool Private is yes

Market Analysis Summary | Single-Family

Listings as of 8/11/2021 at 8/11/2021 3:31:57PM, Page 1 of 2

#	MLS #	Address	Subdivision	Pool	BR	FB	HB	# Gar	Bld SqFt	Yr Blt	Lot SF	List Price	LP/SqFt	COOM	Cls Date	Sold Price	SP/SqFt	SP/LP%	
Listings: Active																			
1	34390566	2914 Parkwood Drive	Parkwood Place Sec 02	Yes	5	4	0	3	3,520	1996	9,200	\$360,000	\$102.27		14				
2	9597948	106 Lakeside Drive	Lakeview Homes Add	Yes	5	3	1		3,054	1973	40,075	\$360,000	\$117.88		58				
3	10586186	16066 Sea Palms Drive	Newport	Yes	3	2	1	1	2,131	1984	28,574	\$365,000	\$171.28		0				
4	1066455	16003 Bollard Drive	Newport Sec 02	Yes	4	2	1	2	3,123	1976	25,633	\$365,000	\$116.87		38				
5	88548546	7609 Bridle Path Drive	Ralston Acres	Yes	3	3	0	0	2,877	1975	43,623	\$379,900	\$132.05		5				
6	87949592	18246 Noble Forest Drive	Timber Forest Sec 7	Yes	4	3	1		3,322	2001	6,325	\$380,000	\$114.39		30				
7	50427100	435 Wellford Lane	Highland Woods 2	Yes	4	4	2		3,558	2005	13,800	\$389,000	\$109.33		21				
8	81941920	14307 Hartshill Drive	Summerwood Sec 02 Lakes Villag	Yes	6	4	1	1	3,950	1997	8,790	\$395,000	\$100.00		*108				
9	28225371	3833 Gatewood Road	Gatewood	Yes	5	3	0	2	2,737	1980	174,240	\$399,900	\$146.11		*36				
10	37375192	6907 Harvest Glen Drive	Pinehurst of Atascocita	Yes	3	2	1	2	2,435	1996	12,223	\$400,000	\$164.27		18				
11	41178886	6826 Sjolander Road	William Bloodgood #17	Yes	5	3	0	1	3,507	1961	40,075	\$400,000	\$114.06		103				
12	54667984	8322 Trophy Place Drive	Walden On Lake Houston Ph 06	Yes	5	3	1	3	2,960	2002	8,705	\$449,900	\$151.99		36				
13	9620137	1238 Foley Road	Gum Gully Village	Yes	3	2	0		2,052	1984	43,996	\$450,000	\$219.30		23				
			Min		3	2	0	0	2,052	1961	6,325	\$360,000	\$100.00		0				
			Max		6	4	2	3	3,950	2005	174,240	\$450,000	\$219.30		108				
			Avg		4	3	1	2	3,017	1987	35,018	\$391,823	\$135.37		38				
			Med		4	3	1	2	3,054	1984	25,633	\$389,000	\$117.88		30				

Cloud CMA

Cloud CMA allows users to create custom, engaging CMA Reports, Buyer Tour Reports, Property Reports and Flyers. *Cloud CMA is only available for HAR MLS Platinum Subscribers. To learn more, join us in our CMA: Price it Right class!



cristina@har.com [Settings](#) [Sign out](#) [Help](#)

Check out the new [Interactive CMA for your iPad](#)

Home
CMA
Buyer Tour
Property
Flyer

Create CMA Report

Fetch Listings

Criteria
Listings
Customize
Publish

Name the report

Client

Notes (These are private notes that don't appear in the report)

Subject Property

Address

Photo (Optional)

[Choose File](#) No file chosen

Property Type

Residential ▼

Sq Ft **Beds** **Baths**

[Advanced info](#) - Additional subject info used in four column layouts.

How do you want to get comparative listings?

Exactly what you want - By MLS Numbers

0052408, 42215303, 9559646, 61941024, 66912424, 60255422, 70734248, 59747443, 19061384, 81602485

Get exactly the listings you want by narrowing down your comps on the MLS first.

Tip: Separate your MLS Numbers with commas, spaces, or new lines.

Quick and dirty - By Proximity

Automatically find listings near the Subject Property

Get at least listings

Only go back months for off market listings

This method automatically brings back listings closest to the Subject Property.

Tip: Get more listings than you need - you can filter out listings that are not good comps in the next step.

OR

Text/Share

Selected listings can be shared in a variety of ways.

QuickList

The QuickList is a simple way to access all tools and services for any listing.

You have selected 5 listings

- 1238 Foley Road
- 6907 Harvest Glen Drive
- 3833 Gatewood Road E
- 16003 Bollard Drive
- 16066 Sea Palms Drive

Promote / Share

- Send to Clients**
Send Invite to your customers/clients.
- Share a Post on Social Media**
Promote your listings on social media.
- Text these Listings**
Send a text message for these listings.
- Drive Directions**
Get optimized routes with HAR.com map directions.
- Recommend to VOW Subscribers**
Recommend this property to your subscribers.

The Refine Tab

Actions **Refine** Save Carts

Previous 1 2 3

View as Select a Contact Narrow Discard Sort Search selected for

Narrow

On the results screen, when listings are selected, clicking Narrow will remove the unselected listings.

Discard

On the results screen, when listings are selected, clicking Discard will remove the selected listings.

The Save Tab

Actions Refine **Save** Carts

New Saved Search New Auto Email New Speed Bar Shortcut

New Saved Search

On the Results screen, New Saved Search will allow users to save a search for quick access later.

New Auto-Email

On the Results screen, New Auto Email will allow users to have the system notify their contacts when there are new or updated properties that match their criteria. To have the system generate listing emails to clients, first a search needs to be created. Once the initial listings are selected/checked, click "Save", then "New Auto Email".

✉ Save a New Auto Email

👤 Recipients

Contact: [Create a New Contact](#)

To:

CC:

BCC me a copy of all emails

📧 Message

Subject:

Welcome Email Recurring Email

Salutation:

Message:

Welcome to "The Portal"!

All messages I send to you containing listing information, whether they have been sent manually or through an automated search that I have created for you, will contain a link to your personalized page on The Portal.

You can access The Portal with your favorite web browser, where you'll be able to view the listing information, photographs, maps, and more. For your

Signature: Texas law requires all license holders to provide disclosures to prospective clients. Please read the [Information About Brokerage Services](#) and the [Consumer Protection Notice forms](#). [IABE](#)

Melinda Barkman
 HAR- Professional Development
 Member Outreach & Training Specialist
 713-629-1900
[Email me here!](#)
[Agent Website](#)
[Sign up to view premium content!](#)

[Edit Your Signature](#)

Language: English

⚙️ Criteria:

Property Type is 'Single-Family'
 Status is 'Active'
 Zip Code is like '77450*'

⚙️ Settings

Concierge: Enable concierge mode

Show this contact in Reverse Prospecting results

Enable as a Favorite Search on Home tab (10 maximum)

📅 Schedule

ASAP: Emails are sent as soon as possible.

Daily: Emails are sent on the days you choose.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

🗑️ Clear

Monthly: Emails are sent on the first of the month at midnight.

✖ Cancel
Save

Choosing Auto Emails from the My Matrix ribbon lets you see the emails built, see the results, edit the search parameters and keep an eye on your client's activity on the platform.

The screenshot displays the 'Auto Emails' interface. At the top, there's a header with 'Auto Emails 3/3' and 'Sorted by Subject'. A search bar is present with the placeholder 'Search by Contact Name or Subject'. Below the header is a table with columns: Subject, Contact Name, BCC, Schedule, Concierge, and Last Viewed. The table contains three rows of auto email configurations. Below the table, there are tabs for 'Settings', 'Criteria', 'Results', 'Search', 'Date Since', 'Market Update', and 'Open in Portal'. The 'Settings' section shows 'Last Run by Agent' (01/16/2024), 'Last Viewed by contact' (01/19/2024), 'BCC' (Yes), 'Status' (Active, Next Send Due: ASAP), and 'Schedule' (Concierge). The 'Criteria' section shows various filters like 'Property Type is 'Single-Family'', 'Status is one of 'Coming Soon', 'Active', 'Pend Cont to Show'', etc. At the bottom, there are buttons for 'Delete' and 'Disable'.

Subject	Contact Name	BCC	Schedule	Concierge	Last Viewed
<input type="checkbox"/> Look at these homes!	Burkman, Astro	Yes	ASAP	0	never
<input type="checkbox"/> Look at these homes!	Burkman, Astro	Yes	DAILY	0	never
<input type="checkbox"/> New listings	Holmes, Sherlock	Yes	ASAP	14	01/19/2024

Settings | Criteria | Results | Search | Date Since | Market Update | Open in Portal

Last Run by Agent: 01/16/2024
 Last Viewed by contact: 01/19/2024

BCC: Yes
 Status: Active, Next Send Due: ASAP
 Schedule: Concierge

Unsent: 14
 Sent: 8
 Rejected: 0

Criteria: Property Type is 'Single-Family', Status is one of 'Coming Soon', 'Active', 'Pend Cont to Show', Building SqFt is 1400+, City/Location is 'Katy', Zip Code is like '77450+', School District is '30 - Katy', MLS is 'Houston Association of Realtors', Kitchen Desc is 'Breakfast Bar'.
 1 Listing has been discarded.

> Sent Email

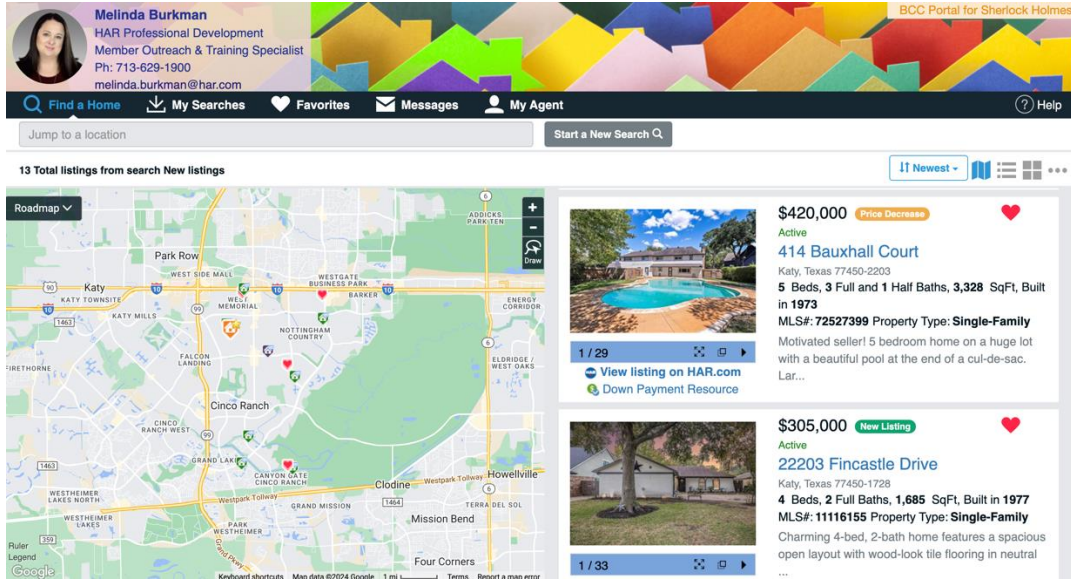
Delete | Disable

Either an existing Contact may be chosen by selecting the down arrow and choosing from a list or a new Contact may be created. First name, last name and email address are all required fields. Next, a Subject must be entered for the emails. The system will generate a message for the body of the email, but it can be modified by entering new text in the Message field. Under Settings, the system defaults can be changed. Schedule determines the frequency of the auto emails. ASAP sends the emails when a listing matches the criteria. Daily can be set to email up to twice a day on the selected days. Monthly sends the email on the first of the month.

Once the information is saved, the system will start sending the emails and create The Client Portal.

The Client Portal

The Client Portal is a website that contains all the property results found by creating an Auto-Email.



The activity of all contacts can be accessed from the Matrix navigation menu. Hover the "My Matrix" tab and select "Contacts". The columns on the right side of the screen indicate listings the client may have marked as a favorites, possibilities, or discards.

» Contacts 3/3												
											Add	Import
											Search by name, email, or ref#	
											Gallery	
Name	Email	Category	Auto Email	Saved Search	My Last Use	Last Portal Visit	Cart	Listing Notes	Favorites	Possibilities	Discards	Ref#
<input type="checkbox"/> Burkman, Astro				2	01/16/2024	01/07/2023	2		8	1		63004
<input type="checkbox"/> Holmes, Sherlock			1		12/05/2023	01/19/2024			10		1	63006
<input type="checkbox"/> Burkman, melinda				1	12/15/2023	06/06/2023			3			63008

Portal Notification Settings

In order to be notified of client activity on The Client Portal, you must enable notifications.

Hover on the “My Matrix” menu then click “Summary” => “Settings” => “Portal Notification Settings”. Check the options that best suit your needs. The selections will affect all Client Portals.

Portal Activity Notification Settings

Use this page to control how and when you would like to be notified of activity performed by your contacts.

When a contact does this...	Notify me ASAP via Email	Notify me ASAP via Text	Notify me via Daily Summary Email
Visits Portal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saves a Favorite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Removes a Favorite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saves a Possibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Removes a Possibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adds Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saves a Search	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visits Portal First Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Text Notification Settings

Text notifications are sent as emails to your phone's MMS address and will display on your phone as text messages from HAR@matrixemailer.com

Mobile Phone Number:

Cellular Provider:

[Click here to edit your cellular information](#)

[Back to Settings](#) [Save](#)

Carts

Carts will allow users to store individual properties for use later.

Actions Refine Save **Carts**

Select Cart:

Add to Cart View New Cart

The 'Tax' Menu

Public Records will give the user access to the Realist Tax and Matrix Tax programs as well as MUD Bond information. Either tax program can be used to search for property tax data and be used to generate mailing labels.

The screenshot displays the HAR.com website interface. At the top, a navigation bar includes links for MY MATRIX, ADD/EDIT, SEARCH, TAX, STATS, MARKET REPORTS, FINANCE, and LINKS. A dropdown menu for the 'TAX' link is open, showing options for Realist Tax, Matrix Tax, and MUD Bond Information. Below the navigation bar is a search input field with the placeholder text 'Enter Shorthand or MLS#'. The main content area is divided into several sections: 'News & Alerts' (with a message dated Feb 16), 'Additional' (with links for Concierge, External Links, Hot Sheets, and HAR-Developed Showing Service), and a grid of utility links including Listing Data Checker, Market Watch, My Carts, My Favorite Searches, My Stats, My Listings, Recent Use Contacts, Recent Portal Visitors, and Search. Below this is a 'REALIST Dashboard' section with a user profile for Marilyn Maxwell. The bottom half of the image shows a search interface with a map and a results table. The search filters include Address (123 Main St, City, State Zip), Owner Name (Last, First OR Corporate Name), MLS Listing Number, and Parcel ID / Tax ID. The map shows a residential area with a tooltip indicating 'Use CTRL + Click to see shape value' and 'Median MLS Sale Price'. The results table below the map is currently empty, showing '0 results | 0 selected' and columns for Address, City, Subdivision, Owner Name, and Recording Date. At the bottom of the search interface are buttons for 'Clear All', 'Search', and 'Reports', along with options to 'Export', 'Print', 'Email', and 'Labels'.

Tax Search

Ownership

Owner Last Name:

Owner First Name:

Owner Occupied:

Foreclosure Indicator: Actively in Foreclosure

Location

House #: Direction: Street Name: Type: Direction: Unit #:

[Map Search:](#) No Map Selected

Neighborhood: School District:

Municipality: Building Name:

County: City: Zip Code:

APN / Tax ID:

Transaction Activity

Last Sale Date (Tax Data):

Last Sale Price (Tax Data): (000s)

Seller Name:

Valuation:

Characteristics

Bedrooms: Building SqFt:

Baths - Full: Gross SqFt:

Baths - Half: Acres:

Year Built: Total Units:

Listing Activity

MLS Number:

MLS Status / Date:

Active

Option Pending

Pend Cont to Show

Pending

Sold

Clear 5000+ matches Map Results

M.U.D. Bond Information

District Name	County	Tax Rate	Tax Year	Bonds Authorized	Bonds Issued
Angleton DD	Brazoria	\$0.13	2019	\$0.00	\$0.00
Brazoria Co C&RD #3	Brazoria	\$0.15	2019	\$0.00	\$0.00
Brazoria Co DD #4	Brazoria	\$0.15	2019	\$0.00	\$0.00
Brazoria Co DD #4	Brazoria	\$0.15	2019	\$0.00	\$0.00
Brazoria Co DD #5	Brazoria	\$0.15	2019	\$0.00	\$0.00
Brazoria Co DD #8	Brazoria	\$0.23	2019	\$0.00	\$0.00
Brazoria Co FWSD # 1	Brazoria	\$0.41	2017	\$0.00	\$0.00
Brazoria Co FWSD # 2	Brazoria	\$0.33	2019	\$0.00	\$0.00
Brazoria Co MUD # 2	Brazoria	\$0.40	2018	\$23,400,000.00	\$20,170,000.00
Brazoria Co MUD # 3	Brazoria	\$0.59	2018	\$34,600,000.00	\$20,120,000.00
Brazoria Co MUD # 6	Brazoria	\$0.60	2018	\$51,500,000.00	\$45,595,000.00
Brazoria Co MUD # 16	Brazoria	\$0.89	2018	\$15,760,000.00	\$15,760,000.00
Brazoria Co MUD # 17	Brazoria	\$0.36	2019	\$60,000,000.00	\$33,995,000.00
Brazoria Co MUD # 18	Brazoria	\$0.31	2018	\$43,900,000.00	\$35,175,000.00
Brazoria Co MUD # 18	Brazoria	\$0.31	2018	\$43,900,000.00	\$35,175,000.00
Brazoria Co MUD # 19	Brazoria	\$0.36	2018	\$52,000,000.00	\$43,690,000.00
Brazoria Co MUD # 21	Brazoria	\$1.12	2018	\$55,500,000.00	\$40,850,000.00
Brazoria Co MUD # 22	Brazoria	\$1.40	2018	\$199,240,000.00	\$25,335,000.00
Brazoria Co MUD # 22	Brazoria	\$1.40	2018	\$199,240,000.00	\$25,335,000.00
Brazoria Co MUD # 23	Brazoria	\$0.46	2018	\$30,000,000.00	\$19,985,000.00
Brazoria Co MUD # 23	Brazoria	\$0.46	2018	\$30,000,000.00	\$19,985,000.00
Brazoria Co MUD # 24	Brazoria	\$1.50	2018	\$0.00	\$0.00
Brazoria Co MUD # 25	Brazoria	\$0.69	2018	\$35,000,000.00	\$26,105,000.00
Brazoria Co MUD # 26	Brazoria	\$0.69	2018	\$108,300,000.00	\$74,780,000.00
Brazoria Co MUD # 28	Brazoria	\$0.82	2018	\$89,155,000.00	\$64,525,000.00
Brazoria Co MUD # 28	Brazoria	\$0.82	2018	\$89,155,000.00	\$64,525,000.00
Brazoria Co MUD # 29	Brazoria	\$0.94	2018	\$95,000,000.00	\$23,995,000.00
Brazoria Co MUD # 31	Brazoria	\$1.22	2018	\$90,700,000.00	\$35,925,000.00
Brazoria Co MUD # 32	Brazoria	\$1.35	2018	\$0.00	\$0.00
Brazoria Co MUD # 34	Brazoria	\$0.78	2018	\$81,500,000.00	\$43,775,000.00
Brazoria Co MUD # 35	Brazoria	\$1.00	2018	\$14,475,000.00	\$9,900,000.00