

Matrix Overview Part 2- Customization

CE hours : 3
Course # : 47545



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Course Description

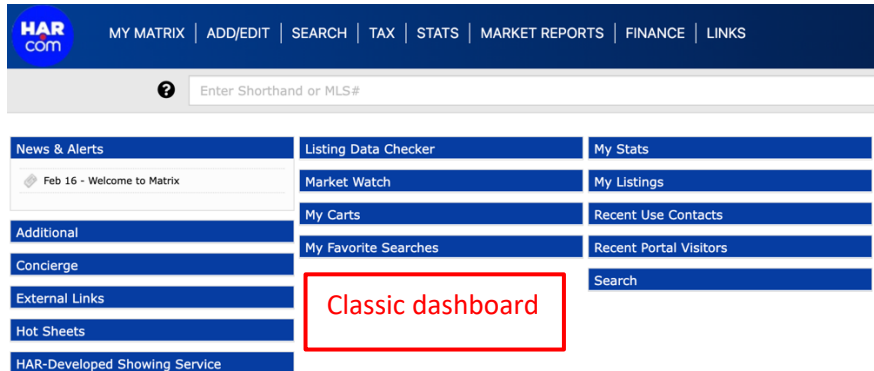
This hands-on MLS course will show students how to customize Matrix to their needs. We will work on choosing a dashboard, personalizing search results, explore a new Matrix search and so much more!

Course objectives:

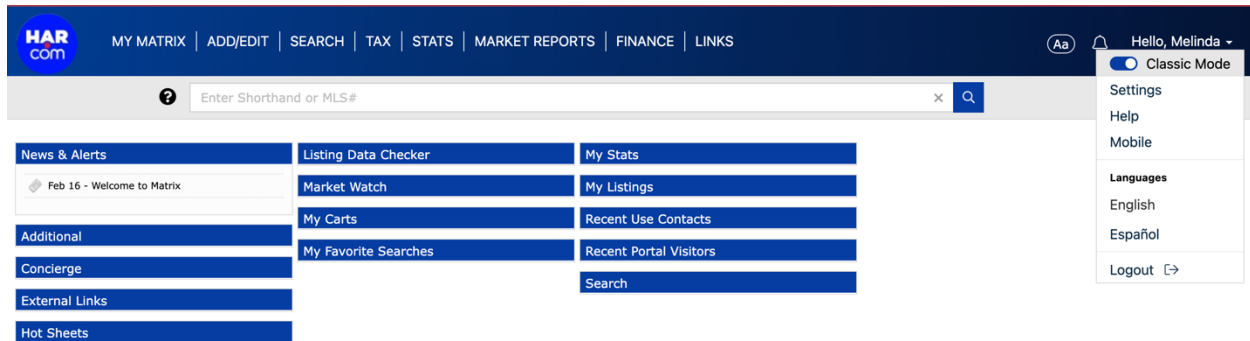
- Dashboard
- Personalize Your Info in Matrix
- Widgets
- Search criteria
- Search results
- Speedbar Shortcuts
- Tax Records
- Map layers
- Auto Emails
- Reports

Dashboard

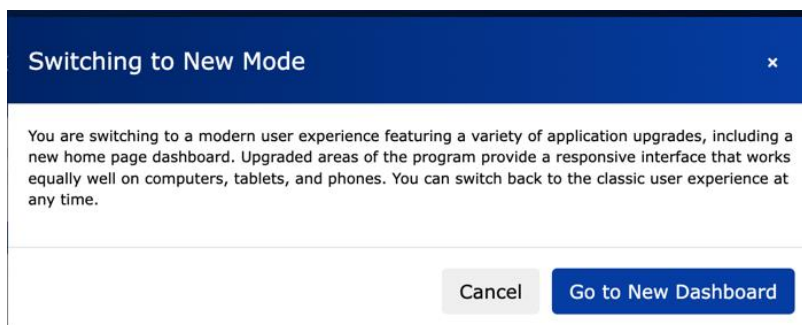
When you first login to Matrix, your view is your dashboard. You now have two choices for the view, a classic dashboard and a new modern dashboard.



To switch to the new dashboard, choose the drop-down arrow under your name in the top right corner. Use the blue button to toggle off classic mode.



Then this pop-up will appear, telling you the dashboard is being changed to the new dashboard. **This can be changed back to Classic Mode at any time by choosing the drop down and toggling on Classic Mode.** Changing to the new mode is not permanent, you can go back to Classic Mode at will!



New Matrix Dashboard

The new dashboard features a timeline display by clicking the >> next to Dashboard. You will see real time notifications like portal activity, status changes and so much more! You can also change the order and de-select widgets.

Notifications Timeline- can be opened and closed from the << symbol on the left

The Timeline on the new Matrix dashboard now has a View All button that takes you to a new Timeline screen where you can filter the list of activities by contact, type, date, and listing address. Also, when contacts add a note from their Client Portal, you can now instantly reply to notes directly from either the Matrix dashboard or the Timeline screen.

You can change the font size of the widgets using the icon “Aa” near your name, in both dashboards. The font has 3 settings, and you can cycle through them to choose.

Minimize Header

You can minimize the red banner at the top of the page by clicking the two arrows next to your name. Then choose again to undo.

Widgets

All widgets except for the "News & Alerts" widget, can be repositioned by clicking and dragging the widget header. In the new dashboard, they are rearranged with the Edit Dashboard button.

Widgets can be collapsed or expanded by hovering over the widget header and clicking the "up" or "down" icon.

Widgets can be closed by hovering over the widget header and clicking the "close" icon. Closed widgets are automatically sent to the "Additional" widget and can be added back to the Homepage simply by clicking and dragging the closed widget header out of the "Additional" widget.

1. News & Alerts: click an item from the list to display the news or alert content in a modal popup window.
2. My Carts: click a cart link to display all listings currently saved in a recently used cart.
3. Market Watch: click on a status link to display all listings with a change to that selected status. Note: each number in brackets represents how many listings will be displayed based on the Property Type and time frame you selected. To customize this widget, click "Customize".
4. Recent Portal Visitors: quickly view a recent Portal visitor's information by clicking on their name or open their Portal by clicking on the associated "Portal" icon.
5. My Favorite Searches: click a link to display the results of your favorite saved search.
6. My Listings: click a link to display all your listings.
7. Concierge: click a client's name to display all listings waiting on approval before being sent.
8. Recent Use Contacts: click a name to display details of a recently used contact.
9. Hot Sheets: click to view changes that have taken place in the MLS.
10. Additional: close any widget or click and drag widget headers to/from this area to help manage the Homepage layout.
11. External Links: links to external MLS resources including MLS rules, Data Input Sheets, etc.
12. Search: quick search for a property address.
13. Listing Data Checker: view Violation History, Notifications and Reported Violations.

News & Alerts

Feb 16 - Welcome to Matrix

Recent Portal Visitors

You have no recent portal visitors.

Recent Use Contacts

Listing Data Checker

Violation History
My Notifications
Reported Violations

My Favorite Searches

Actives in Nottingham Country	Manage
Downtown Hou Condo/Townhome	Manage
Dr. Astro's Home Search Ex	Manage
New Listings Cinco Ranch	Manage
Westbury	Manage

Update All

My Carts

House for Steve!! (1)
Stacy (4)
New Listings Cart (24)

All Carts

My Listings

My Office Incomplete Listings (29)
My Firm - Incomplete Listings (32)
All Incomplete Listings (3378)
All Coming Soon Listings (411)

Refresh

External Links

- FEMA Flood Maps
- MAAPnext - Know Your Flood Risk
- HOA Information - Texas Real Estate Commission
- Download HAR Mobile App**
- Download HAR Media App**
- Download Open House Registry App**
- HAR Tools Playlist**
- Down Payment Resource**
- Geo Market Area Map
- MUD Bond Information
- Filling out the HAR400 Form
- Transaction Desk**
- Dotloop
- HAR Home Value Comparisons**
- Remine
- Cloud CMA
- Realtor Property Resource (RPR)**
- School Zone Finder
- Image Resizer for Windows

Market Watch

New Listing (2237)	█
Back On Market (482)	█
Price Decrease (2003)	█
Price Increase (879)	█
Option Pending (1103)	█
Pending Continue to Show (257)	█
Pending (1952)	█
Sold (1279)	█
Coming Soon (186)	█
Withdrawn (276)	█
Expired (556)	█
Terminated (750)	█

Single-Family 7 Day

Refresh Customize

Search

MLS Number	<input type="text"/>	
Price	<input type="text"/>	(000s) <input checked="" type="checkbox"/>
Status	<input type="text"/>	
Street Number	<input type="text"/>	
Street Name	<input type="text"/>	
Street Type	<input type="text"/>	
Subdivision	<input type="text"/>	
Zip Code	<input type="text"/>	
City	<input type="text"/>	

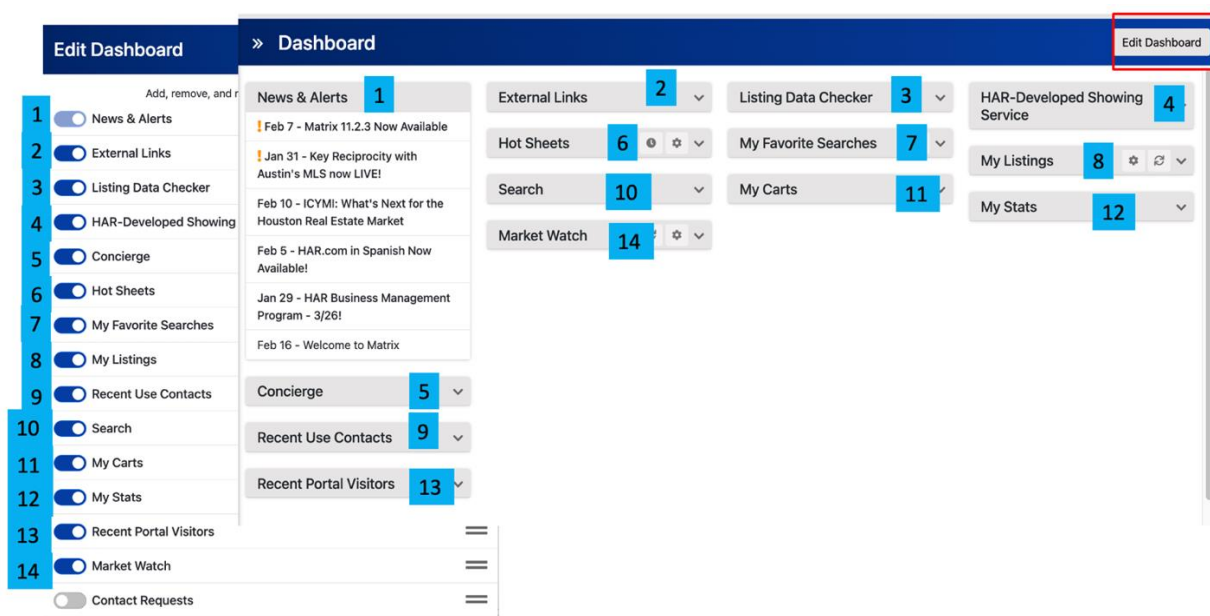
Additional

Concierge

HAR-Developed Showing Service

Customizing Widgets in the New Dashboard

You may use the Edit Dashboard icon to see the order of the widgets and drag their order in the list view to move the icon. The widgets are ordered horizontally by column. See the image below to see how their position in the list corresponds to the dashboard view.



Hot Sheets

1. From the Homepage, click the "Customize" link on the "Hot Sheets" widget.
2. Select a Hot Sheet to manage. Click the "Add" link to create a new Hot Sheet or click the "Edit Criteria" link to edit an existing Hot Sheet.
3. Select a time frame to use for your Hot Sheet.

New Only: only shows listings which are new/changed since the last time the user ran the Hot Sheet.

This Session: only shows listings which are new/changed since the last time the user ran the Hot Sheet in a prior session.

24 Hour, Today, 3 Days, 7 Days: only shows listings which are new/changed during the specified time frame.

Custom: allows the user to run a Hot Sheet using a custom date or a time range.



Market Watch

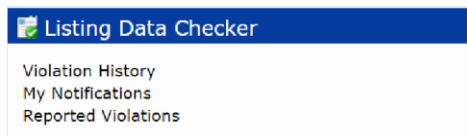
1. From the Home Page, click "Customize" on the "Market Watch" widget.
2. Click the "Map Search" link and use the map shape tools to select specific areas to watch (optional). Note: you may also select a general location from any of the controls below the Map link.
3. Enter the specific criteria that you would like to include as a part of your customized search. Note: for more information, see "Criteria Search" in the "Search" section.
4. Add/Remove Additional Fields (optional).
5. Click "Save" on the Button Bar.
6. Select a property type from the dropdown list.
7. Select a time frame from the dropdown list.
8. Click a status link to view listings that now meet your new, custom Market Watch search criteria. Note: to run another Market Watch search without having to return to the Homepage, click the dropdown arrow on the "Results" page to display your Market Watch options



Listing Data Checker

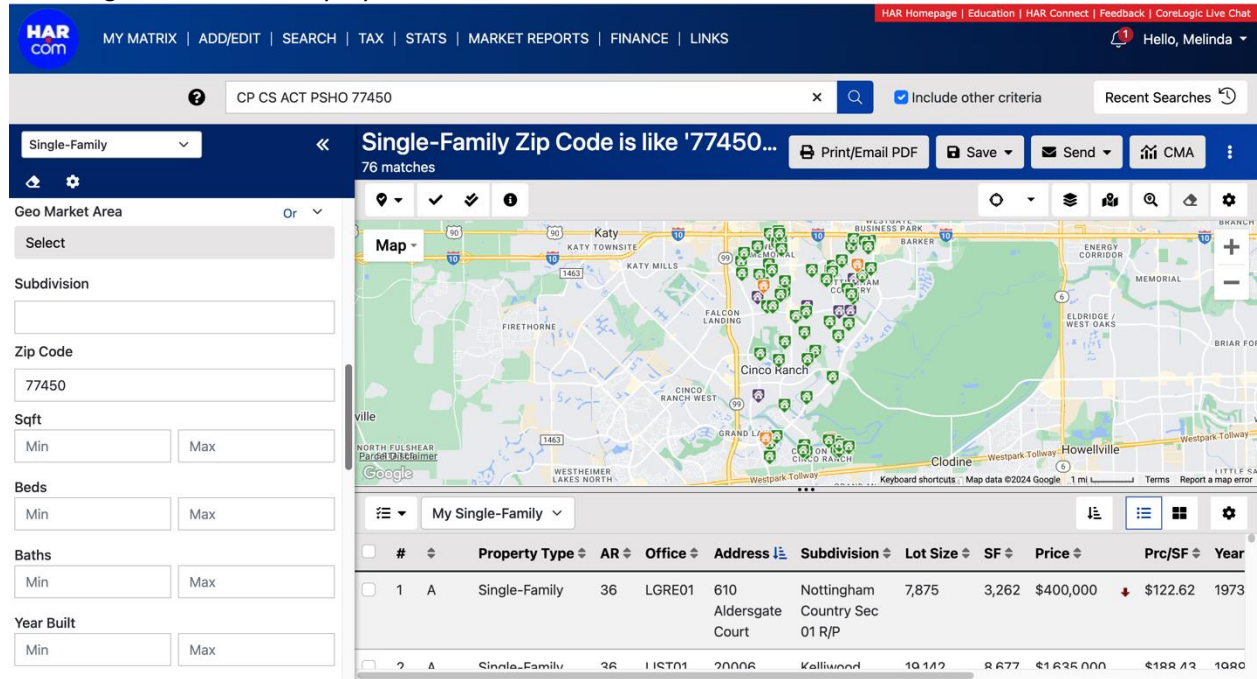
This is a valuable widget for monitoring violations to the MLS and helping you to remedy them, so you can avoid a fine.

Listing Data Checker



Matrix New Search

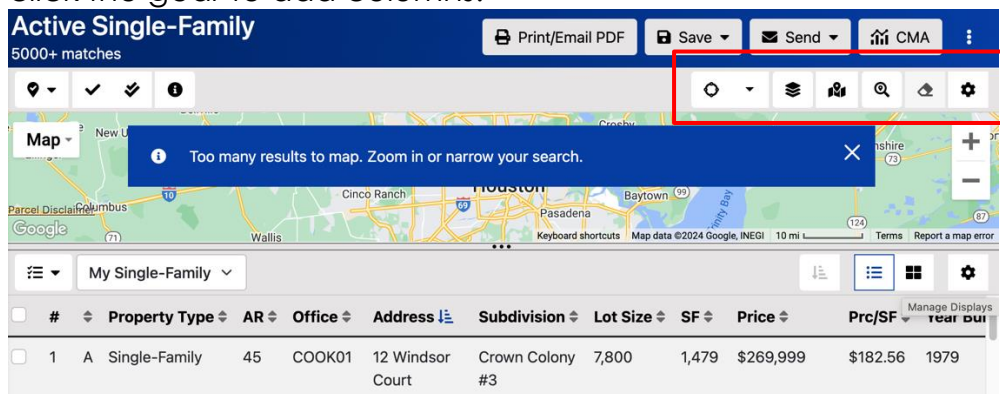
Matrix's all-new search interface is designed to be fully responsive, no matter what size screen you are using. The new search provides an intuitive and efficient user experience across a wide range of screen resolutions and devices, including mobile phones, tablets, and computers. At desktop resolutions,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



Customizing the Results Grid

Sorting Columns

Columns can be sorted by selecting the column heading. When the pointer is above the column name, the pointing hand icon appears allowing the column to be sorted by clicking. Note: there are thick, medium, and thin arrows denoting primary, secondary and tertiary sort items. In the new search, you can click the gear to add columns.



Here you can customize the columns, drag them to reorder and add new using the list under Available section.

Search Results List ✕

Name Select and arrange the fields in the search results list.

My Single-Family

Selected

- Property Type ✕
- Status (Single Line) ✕
- AreaCode ✕
- List Office MLSID ✕
- Street Address ✕
- Subdivision ✕

Clear All

Available

Filter

2nd Middle School

Access

Access Lockbox

Acres

Acres Description

Active Open House Count

Address

Allow Online Appointment

Amortized Years

Annual Maint Desc

Appliances

Application Fee

Appointment Phone

Approval Required

Approval Requirements

Cancel Save Delete

In standard and quick search, you can reorder the columns. Columns can be moved by hovering the mouse above the column heading, selecting the column using the crosshairs icon and dragging the column to the new position.

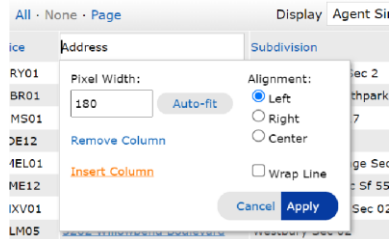
The screenshot shows the HAR Matrix search results interface. At the top, there's a navigation bar with 'MY MATRIX | ADD/EDIT | SEARCH | TAX | STATS | MARKET REPORTS | FINANCE | LINKS'. Below that is a search bar containing 'RES ACT' and a 'Recent Searches' dropdown. The main content area displays a table of search results with columns for #, TX, OH MLS #, Stat, AR, Office, Address, Price, Appt Desc, Front Door Faces, DPR, Subdivision, Lot Size, SF, Price, Prc/SF, YB, BR, and Bth. The table lists 21 properties, each with a row of icons for actions like 'Criteria', 'Map', and 'Results'. At the bottom, there are buttons for 'Actions', 'Refine', 'Save', and 'Carts', along with a 'Showing Smart' indicator.

Matrix Overview Part 2- Customization

Revision date: 10/2024

Adding Columns

Columns can be added by hovering the mouse above any column heading and selecting the column using the crosshairs icon. When the heading is selected, a dialog box opens. Select Insert Column to add. Click Apply and the new column will be added.




Setting the Default Grid

There are two options for saving the grid: saving a copy of the grid and selecting the copy as the new system default.

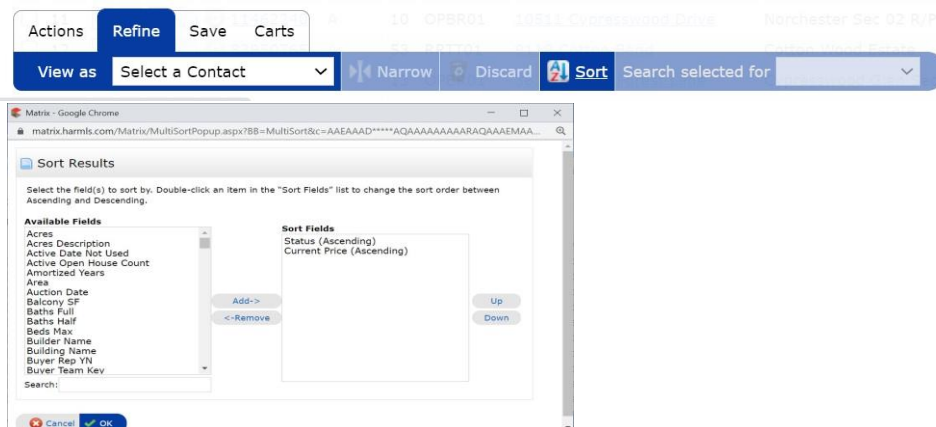


By clicking on the Manage Display icon () a copy of the Results Grid can be saved with a custom name. Saved grids also become custom, printable reports.

From the Set/Clear Defaults Icon (), selecting "Set current display, sort order and count per page as my Search starting default" will retain the customized results grid setting for future searches.

Customizing Sort Order

Clicking Sort in the Refine tab in the lower left of the screen, will allow users to change the sort order of the Results Grid.



Creating New Speed Bar Shortcuts

On the results screen, New Speed Bar Shortcut will allow users to create new shortcuts. To view the shortcuts you created, hover over the My Matrix option then select Summary. On the Summary page, select Settings. Then choose Speedbar Shortcuts to see and edit existing.



 A screenshot of a dialog box titled 'Save a New Speed Bar Shortcut'. It contains a search input field with a magnifying glass icon. Below the input field are two sections: 'Speed Bar Shortcut:' with a yellow highlighted input field containing a slash '/', and 'Description (optional):' with an empty text area. Underneath is a 'Criteria:' section listing search filters: 'Property Type is 'Single-Family'', 'Status is 'Active'', 'Current Price is 350000 to 450000', 'Bedrooms is 3+', 'Baths Full is 2+', and 'Stories is 1'. At the bottom are 'Cancel' and 'Save' buttons.

A screenshot of the 'Manage Speed Bar Shortcuts' page. At the top is the HAR.com logo and navigation links: 'MY MATRIX', 'ADD/EDIT', 'SEARCH', 'TAX', 'STATS', 'MARKET REPORTS', 'FINANCE'. Below is a search bar with a question mark icon and the text 'Enter Shorthand or MLS#'. The main content area is titled 'Manage Speed Bar Shortcuts' and includes a brief instruction: 'Use this page to modify or delete speed bar shortcuts. To create a new speed bar shortcut, run a search and "Save" the criteria as a speed bar shortcut.' Below this is a table with columns 'Shortcut' and 'Description and Criteria'. The table lists several shortcuts with checkboxes, such as '/77450Actives', '/allkaty', '/bellairepool', '/Bellairewithpool', '/CSNearme1500+', '/Nottingham', '/SFCS77005Steve', and '/Sherlock'. Each entry includes detailed criteria like 'Property Type is 'Single-Family'', 'Status is 'Active'', 'Current Price is 400000 to 500000', etc. At the bottom are 'Back to Settings' and 'Delete' buttons.

Public Records - Realist Tax, Matrix Tax and MUD Bond Information

Use public records to find property information and generate mailing labels. Locate information about a MUD using the MUD Bond Information worksheet.

A screenshot of the HAR.com navigation menu. The top bar contains the HAR.com logo and links for 'MY MATRIX', 'ADD/EDIT', 'SEARCH', 'TAX', 'STATS', 'MARKET REPORTS', 'FINANCE', and 'LINKS'. Below the navigation bar is a search bar with a question mark icon and the text 'RES ACT'. A dropdown menu is open over the 'TAX' link, listing four options: 'Realist Tax', 'Matrix Tax', 'MUD Contact Information', and 'PID Disclosure Information'. At the bottom left is a 'Try Our New Search' button, and at the bottom right are 'Criteria' and 'Filter' icons.

REALIST Dashboard Marilyn Maxwell

Multiple Counties Selected Change County

QUICK SEARCH MY SEARCH

Address starts with
123 Main St, City, State Zip

Owner Name starts with
Last, First OR Corporate Name

MLS Listing Number starts with

Parcel ID / Tax ID starts with

Clear All Search

View results (0 matches)
1 - 1000 1001 - 2000 2001 - 3000

0 results | 0 selected

	Address	City	Subdivision	Owner Name	Recording Date
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Export Print Email Labels Reports

Use the “Quick Search” tab to quickly pull up a single property. Use the “My Search” tab to create a more detailed search (by subdivision, etc.).

REALIST Dashboard Marilyn Maxwell

Multiple Counties Selected Change County

QUICK SEARCH MY SEARCH

Saved Searches
-Select-
Customize Search Save

Parcel ID starts with

Owner Name starts with
Last, First OR Corporate Name

Bedrooms is between

Clear All Search

View results (4 matches)
1 - 1000 1001 - 2000 2001 - 3000

4 results | 4 selected

	Sold	Address	City	Subdivision	Owner Name	Recording Date
1	📌	4823 Jason St	Houston	Meyerland 1	Butler Shelly D/butler Ric	09/01/2016
2	📌	5139 Beechnut St	Houston	Meyerland 2	Current Owner	10/16/2020
3	📌	4834 Imogene St	Houston	Meyerland 4	Tran Mai V	01/02/2018
4	📌	8815 Manhattan Dr	Houston	Meyerland 6	Wise Cedric R	

Export Print Email Labels Reports

Double-click a property to open the tax details. The balloon icon represents MLS data for that property (red in the example is indicating that that property is sold). Click the “Labels” menu to generate labels for selected properties. Note: all properties are automatically selected, so you will need to deselect those you do not want.

Matrix Tax

The screenshot shows the Matrix Tax search interface. At the top, there's a navigation bar with 'HAR.com' logo and links for 'MY MATRIX', 'ADD/EDIT', 'SEARCH', 'TAX', 'STATS', 'MARKET REPORTS', 'FINANCE', and 'LINKS'. A search bar contains 'matrix.harmls.com/Matrix/Tax/MatrixTax'. Below the navigation bar, there's a search criteria section with 'Enter Shorthand or MLS#' and 'Recent Searches'. The main search area is titled 'Tax Search' and includes several filter categories:

- Ownership:** Owner Last Name, Owner First Name, Owner Occupied, Foreclosure Indicator (Active in Foreclosure).
- Location:** House #, Direction, Street Name, Type, Direction, Unit #, County (Brazoria, Fort Bend, Galveston, Harris, Montgomery), City, Zip Code, APN / Tax ID.
- Transaction Activity:** Last Sale Date (Tax Data), Last Sale Price (Tax Data) (000s), Seller Name, Valuation (RealAVM™ Estimate, Assessed Value) (000s).
- Characteristics:** Bedrooms, Building SqFt, Baths - Full, Gross SqFt, Baths - Half, Acres, Year Built, Total Units, Stories, Pool Y/N, Land Use (CoreLogic).
- Listing Activity:** MLS Number, MLS Status / Date (Active, Option Pending, Pend Cont to Show, Pending, Sold, Withdrawn, Expired, Terminated).

 At the bottom of the search area, it indicates '5000+ matches' and has buttons for 'Map' and 'Results'.

Search for property information by tax criteria (owner name, address, etc.) or MLS criteria (list date, MLS status, etc.). Click Results.

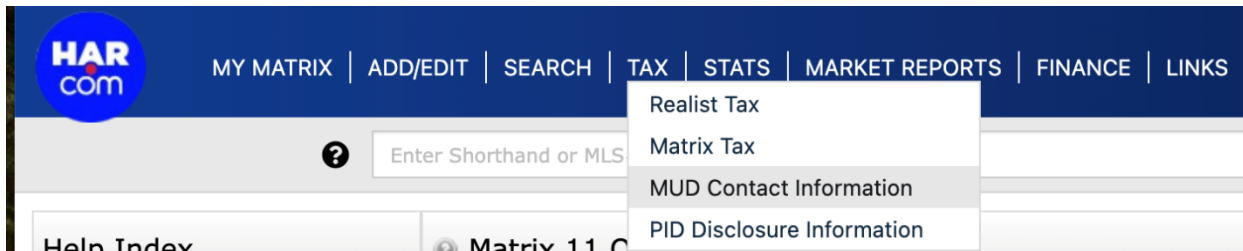
The screenshot shows the search results table. The table has the following columns: Parcel ID, Address, City Name, Postal Code, Subdivision, Ownersname Mail, Building Sq Ft Beds, Baths (Total), Land Use - CoreL, Lot Acres # of Stories, Yr Built, Assessed Total Va, and Tax Amount MLS. The table displays 25 results, with the first few rows highlighted. The 'Assessed Total Va' and 'Tax Amount MLS' columns are formatted with commas and two decimal places. At the bottom of the table, there are navigation controls including 'Previous', 'Next', '1-25 of 255', 'Checked 6', 'All', 'None', 'Page', 'Display', 'Tax Grid', 'at 25 per page', and 'Results'. There are also buttons for 'Criteria', 'Email', 'Print/Email PDF', 'Directions', and 'Export'.

Parcel ID	Address	City Name	Postal Code	Subdivision	Ownersname Mail	Building Sq Ft Beds	Baths (Total)	Land Use - CoreL	Lot Acres # of Stories	Yr Built	Assessed Total Va	Tax Amount MLS
094-316-000-0002	8930 Ferris DR	Houston	77096	Meyerland Sec 04 Bellaire Methodist		MLS:4	MLS:5	Public (Nec)	0.231 MLS:2	MLS:2021		463
094-319-000-0014	5150 N Brasewood BLVD	Houston	77096	Meyerland Sec 04 Josephine R Moel		2,861 3	4	Sfr	0.331 1	1961	\$442,668	\$10,719.57
094-317-000-0003	5151 Loch Lomond DR	Houston	77096	Meyerland Sec 04 Margarita M Grue		2,502 4	3	Sfr	0.272 1	1961	\$544,179	\$13,177.75
094-319-000-0005	5143 Brasvalley DR	Houston	77096	Meyerland Sec 04 Lillian A Price		2,745 5	3	Sfr	0.276 1	1961	\$330,320	\$7,998.97
094-317-000-0012	5142 Brasvalley DR	Houston	77096	Meyerland Sec 04 Keith & Mary Coh		2,612 Tax:3 MLS:4	Tax:3 MLS:2	Sfr	0.265 1	1961	\$269,460	\$6,525.20
094-317-000-0001	5159 Loch Lomond DR	Houston	77096	Meyerland Sec 04 Robert S & Aman		5,306 5	Tax:5 MLS:3	Sfr	0.328 2	1968	\$823,575	\$19,943.55
094-318-000-0006	8919 Pritchett DR	Houston	77096	Meyerland Sec 04 John R Glover & C		2,377 4	2	Sfr	0.260 1	1963	\$480,105	\$11,626.14
094-319-000-0015	5154 N Brasewood BLVD	Houston	77096	Meyerland Sec 04 Triple Z Homes LI		3,775 5	3	Sfr	0.355 1	1961	\$603,473	\$14,613.60
094-316-000-0007	8922 Ferris DR	Houston	77096	Meyerland 6A North Pointe Prop		MLS:4	MLS:4	Residential (Nec)	0.235 MLS:1	MLS:2021	\$231,000	\$5,593.86
094-315-000-0032	5146 Loch Lomond DR	Houston	77096	Meyerland Sec 04 Mark C Krause		2,372 4	2	Sfr	0.236 1	1960	\$427,105	\$10,342.70
094-318-000-0004	9003 Pritchett DR	Houston	77096	Meyerland Sec 04 George S Taneff		2,377 4	2	Sfr	0.260 1	1961	\$267,120	\$6,468.53
094-315-000-0029	5134 Loch Lomond DR	Houston	77096	Meyerland Sec 04 Yutong Tian		2,354 Tax:3 MLS:4	Tax:3 MLS:2	Sfr	0.219 1	1960	\$461,243	\$11,169.38
094-319-000-0011	5138 N Brasewood BLVD	Houston	77096	Meyerland Sec 04 River G & Rebeck		5,177 Tax:4 MLS:5	Tax:3 MLS:5	Sfr	0.331 1	1969	\$683,967	\$16,562.83
094-317-000-0004	5147 Loch Lomond DR	Houston	77096	Meyerland Sec 04 Keith & Mary Coh		2,352 4	3	Sfr	0.246 1	1961	\$258,800	\$6,267.06
094-317-000-0005	5143 Brasvalley DR	Houston	77096	Meyerland Sec 04 Paul M & Judi Sco		2,398 4	Tax:3 MLS:2	Sfr	0.234 1	1961	\$499,700	\$12,100.65
094-315-000-0033	5150 Loch Lomond DR	Houston	77096	Meyerland Sec 04 Nathan & Regina		3,686 Tax:3 MLS:4	Tax:3 MLS:2	Sfr	0.229 Tax:2 MLS:1	Tax:2018 MLS:1960	\$465,478	\$11,271.94
094-319-000-0012	5142 N Brasewood BLVD	Houston	77096	Meyerland Sec 04 Rajji George & Litt		3,060 4	3	Sfr	0.331 1	1966	\$260,880	\$6,317.43
094-317-000-0011	5138 Brasvalley DR	Houston	77096	Meyerland Sec 04 Jonathan C & Lau		3,158 4	3	Sfr	0.261 1	1961	\$267,880	\$6,474.83
094-318-000-0009	5115 Loch Lomond DR	Houston	77096	Meyerland Sec 04 Christopher R & C		3,038 3	2	Sfr	0.244 1	1964	\$372,222	\$7,923.95
094-319-000-0008	5131 Brasvalley DR	Houston	77096	Meyerland Sec 04 Troy & Dana Dom		2,993 4	Tax:2 MLS:3	Sfr	0.282 Tax:1 MLS:1:1	1961	\$279,600	\$6,770.75
094-315-000-0034	5154 Loch Lomond DR	Houston	77096	Meyerland Sec 04 Geyan Zuo & Gan		3,995 Tax:4 MLS:5	3	Sfr	0.259 Tax:1 MLS:1:1	1960	\$550,287	\$13,325.66

Click the property Parcel ID to open the tax details. The balloon icon represents MLS data for that property (orange in the example is indicating that that property is Pending Cont. to Show, blue is Sold and purple is Withdrawn).

Click Print/Email PDF to create mailing labels.

MUD Contact Information/ PID Disclosures:



Alphabetical list of all MUDs and PIDs contact info will download as an Excel file.

Customizing Stats Reports

Use System Presets to create and save customized statistical reports.

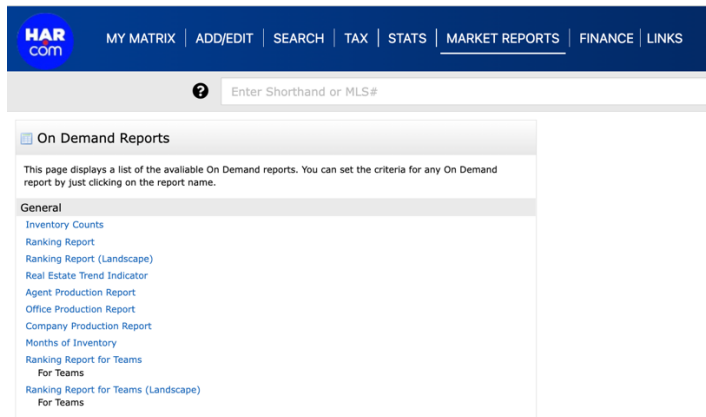
Enter criteria and select one of the System Presets from the left of the screen. Click Generate.



Customize the report results by using the options on the left of the screen. Click Generate.

Customizing Market Reports

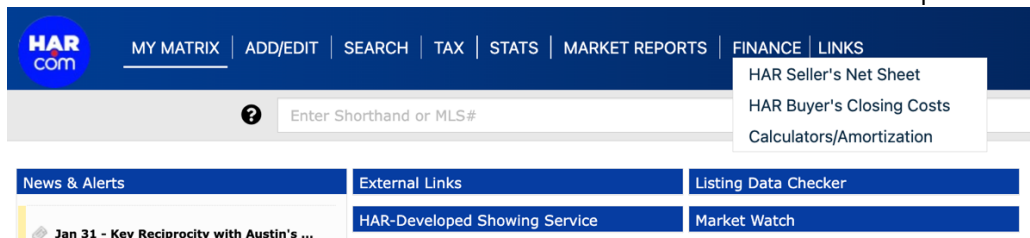
Market Reports gives you access to On Demand Reports. The list of reports available will be different based on the user's access. These reports can be customized based on the user's desired criteria.



Note: The HAR "Months of Inventory" report in the Market Reports menu is more accurate than the one in the Stats section.

Customizing Financial Reports

The Finance menu will give the user access to the HAR Seller's Net Sheet, HAR Buyer's Closing Costs and Calculators/Amortization. These worksheets can be customized with the user's desired criteria and shared or exported from Matrix.



Note: The finance reports in Matrix are not to the HAR Platinum package of tools. Those subscribed to Platinum will have additional report options and the ability to save the reports.

