



MATRIX™ COURSE HANDBOOK

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FOCUSED ON OUR

VISION

To be the resource of choice
for REALTOR® members
and their communities.

PURSuing OUR

MISSION

To enhance REALTOR® member professionalism
by providing education, tools and advocacy to
support them in serving the community.

UPHOLDING OUR

VALUES

- Member-Centric
- Thought-Leader
- Community-Minded
- Professionalism
- Integrity

MATIRX™

Purpose

To give Members and Brokerage Staff the training and confidence they need to work with Matrix™ as part of their daily business.

Duration

2.5 hours

Course Goals

- Discover the widgets on the main dashboard and how to customize them for personal use.
- Explore tabs in “My Matrix™” and their functionality.
- Perform a search by using maps and various search criteria.
- Learn how to customize searches for personal use.
- Create automatically generated emails for your buyers.
- Learn how to decipher symbols used in portals.

Resource Links for Class

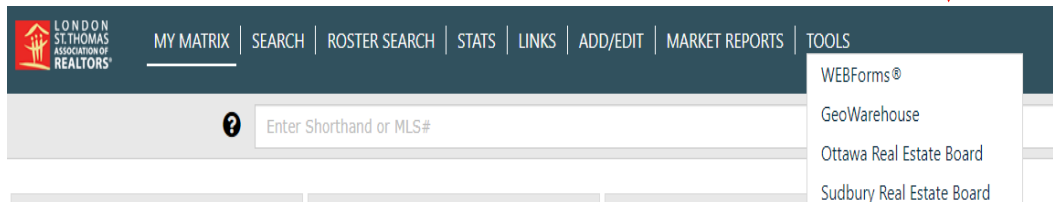
Matrix™ application should be open for class.

City of London Zones Map http://lstar-education.com/images/London-Map/London_Map_Front&Back.pdf

MODULE 1 (20 MIN)

Discovering your Dashboard

1. Explore the following tabs along the top of screen:
 - My Matrix
 - Search
 - Roster Search
 - Links
 - Add/Edit
 - Market Reports
 - Tools (WEBForms®, GeoWarehouse®, Intra Matrix)



NOTES

A large, empty rectangular box with a thin black border, intended for the user to take notes during the module.

MODULE 1 (20 MIN)

2. Learn how to customize the Dashboard by moving, collapsing and expanding the widgets.
3. Learn how to customize Market Watch and Hot Sheets, while reviewing the purpose of each.

NOTES

MODULE 2 (20 MIN)

NOTES

My Matrix™ Tab

1. Examine each element of My Matrix™ tab, paying attention to:
 - Settings
 - My Information
 - Auto Emails
 - My Listings
2. Review briefly:
 - Contacts
 - Sent Email
 - Saved Searches
 - Add/Edit - find out where to update your REALTOR.ca profile

MODULE 3 (30 MIN)

Performing Searches

1. Learn how to complete the criteria page, including searching by remarks.
2. Search using the map function.
3. Learn how to customize the columns for personal use.
4. How to send multiple properties to BrokerBay®.
5. Learn how to print, save as a PDF, or email a listing.

NOTES

MODULE 4 (20 MIN)

Creating Auto Emails for Your Buyers

1. Learn to create an Auto Email for a buyer starting with a search:
 - How to edit an Auto Email
 - How to enable a disabled Auto Search
 - How to delete an Auto Email
2. Identify when buyers express interest in a property by the icons (heart, lightbulb, note)
3. Ensure the notifications get set up in Portal Notifications under Settings/My Matrix™, allowing you to receive the portal notifications automatically from your buyers

NOTES

MODULE 4 (20 MIN)

- Complete a search for your buyer
- Select – "Results"

NOTES

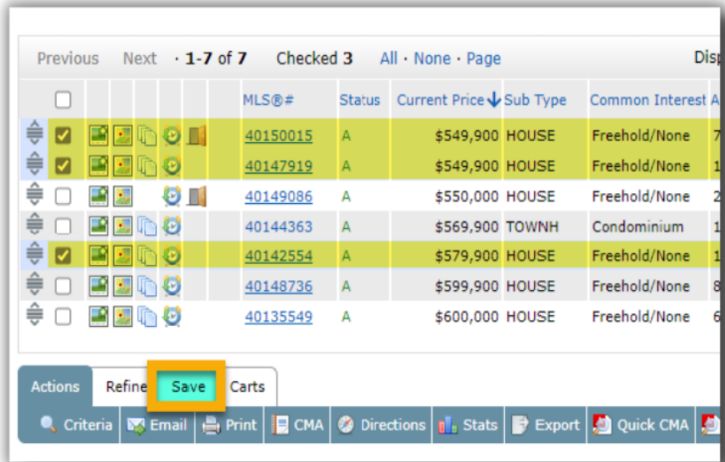
The screenshot displays the search interface of the LONDON ST. THOMAS ASSOCIATION OF REALTORS. The top navigation bar includes links for My Matrix, Search, Roster Search, Stats, Links, Add/Edit, Market Reports, and Tools. Below this is a search bar with the placeholder text "Enter Shorthand or MLS#". The main search area is divided into several sections:

- Status - Date or Range:** Includes checkboxes for Active, Conditional, Pending, Closed, Suspended, Expired, and Cancelled. There are also options to Continue To Show, Do Not Show, and Or/Not.
- Property Sub Type:** Includes checkboxes for House, Apartment/Condo Unit, Row/Townhouse, Mobile Home, Modular Home, and Deeded Parking. There are also options to Or/Not.
- Property Attached:** Includes checkboxes for Attached, Detached, and Semi Detached. There are also options to Or/Not.
- Common Interest:** Includes checkboxes for Freehold/None, Condominium, and Fractional. There are also options to Or/Not.
- Architectural Style:** Includes checkboxes for 1 Storey/Apt, 1.5 Storey, 2 Storey, and 2.5 Storey.
- Location:** Includes a Map Search section with a "No Map Selected" message and a "My Location" button. Below this are fields for St #, Dir Pfx, Street/Island, Street Suffix, Dir Sfx, and Unit #. There are also dropdown menus for Region (Oxford, Niagara, Nipissing, Norfolk, Northumberland, Ottawa, Woodstock) and Municipality/Area (Woodstock, Leamington, Ingersoll, Norwich, South-West Oxford, Tillsonburg, Woodstock, Zama). There are also options to Or/Not.
- Neighbourhood/Subdistrict:** Includes a dropdown menu for Woodstock - North, Woodstock - South, and zzz-Woodstock - (historical data). There are also options to Or/Not.
- City:** Includes a dropdown menu for 10th Line Shore, 1000 Islands, Aberdeen, Aberfeldy, Aberfoyle, and Abingdon. There are also options to Or/Not.
- Waterfront:** Includes checkboxes for Waterfront Y/N, Dock Y/N, and Island Y/N. There are also options to Or/Not.
- Water Body Type:** Includes a dropdown menu for Water Body Type. There are also options to Or/Not.
- Shoreline:** Includes checkboxes for Shoreline. There are also options to Or/Not.
- Docking Type:** Includes a dropdown menu for Docking Type. There are also options to Or/Not.
- Waterfront Features:** Includes a dropdown menu for Waterfront Features. There are also options to Or/Not.
- Listing:** Includes a Price range (400-500) and a checkbox for (000s). There are also fields for MLS#, List/Sell Member, and List/Sell Brokerage.
- Property:** Includes a Bedrooms section with a dropdown menu for Bedrooms. There are also options to Or/Not.
- Bedrooms Above Grade:** Includes a dropdown menu for Bedrooms Above Grade. There are also options to Or/Not.
- Total Bathrooms:** Includes a dropdown menu for Total Bathrooms. There are also options to Or/Not.
- # Full Baths:** Includes a dropdown menu for # Full Baths. There are also options to Or/Not.
- # Half Baths:** Includes a dropdown menu for # Half Baths. There are also options to Or/Not.
- Garage Y/N:** Includes a dropdown menu for Garage Y/N. There are also options to Or/Not.
- Garage Type:** Includes checkboxes for Attached Garage, Detached Garage, and Underground Parking. There are also options to Or/Not.
- Driveway Parking:** Includes checkboxes for Boulevard Parking, Carport Parking, Covered Parking, Front Yard Parking, and Lane/Alley Parking. There are also options to Or/Not.
- Parking Features:** Includes checkboxes for Built-In Garage, Compact Parking, Exclusive Parking, In/Out Parking, and Rental Parking. There are also options to Or/Not.

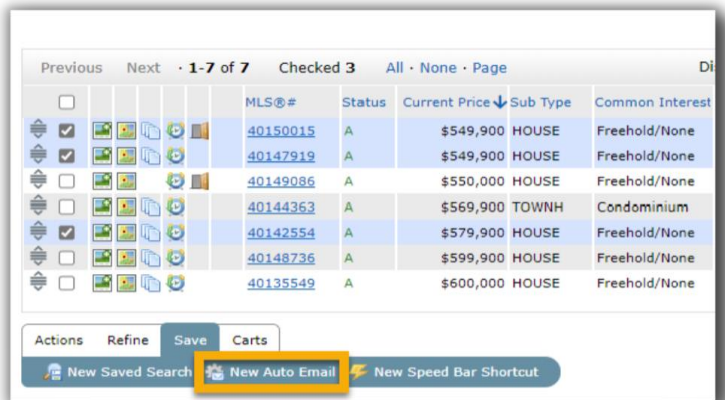
At the bottom of the search area, there are buttons for Clear, 3 matches, Map, and Results.

MODULE 4 (20 MIN)

- Click on “Save”



- Select – “New Auto Email”



NOTES

MODULE 4 (20 MIN)

- Fill in the details indicated in yellow
- Save

Save a New Auto Email

Recipients

Contact: [Yellow Highlighted] Create a New Contact

To: [Empty Field]

CC: [Empty Field]

☒ BCC me a copy of all emails

Message

Subject: [Yellow Highlighted]

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 convenience, you'll be able to sort these listings, rate them and categorize them.

- You have now created an auto-email

NOTES

MODULE 5 (20 MIN)

Creating a CMA (Comparable Market Analysis)

1. Learn how to use the wizard to create a CMA from a search:
 - Identify the other ways to start a CMA (Cart, My CMAs)
 - Be able to recall and delete a CMA
 - How to print, edit, and email a CMA

NOTES

MODULE 5 (20 MIN)

NOTES

How to Create a CMA

- Use criteria to search for comparables for your CMA
- Select – "Results"

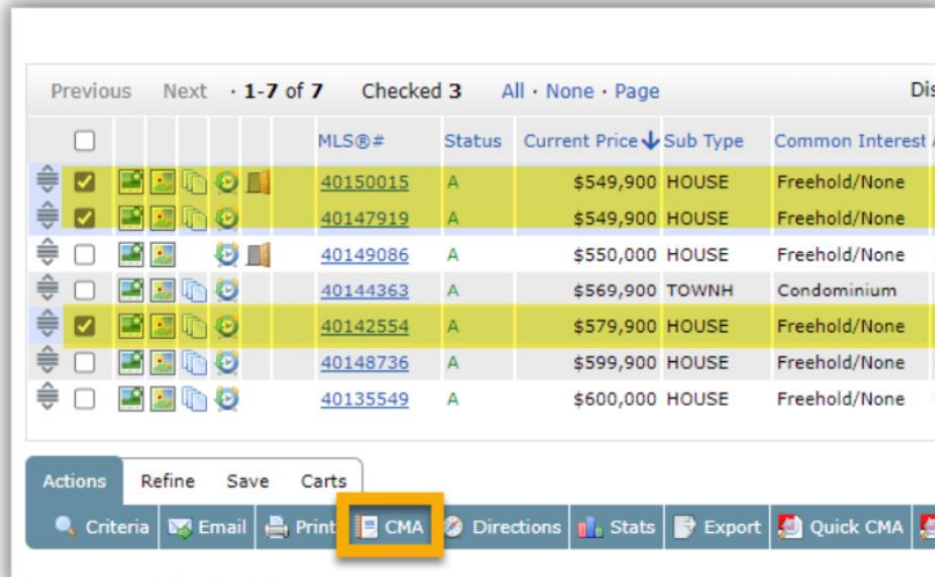
The screenshot displays a web-based search interface for residential properties. The form is organized into several sections:

- Status - Date or Range:** Includes checkboxes for 'Active', 'Conditional', 'Pending', 'Closed', 'Suspended', 'Expired', and 'Cancelled'. There are also options to 'Continue To Show' or 'Do Not Show' and a radio button for 'Or Not'.
- Property Sub Type:** Includes checkboxes for 'House', 'Apartment/Condo Unit', 'Row/Townhouse', 'Mobile Home', 'Modular Home', and 'Deeded Parking'. There are also options to 'Or Not'.
- Property Attached:** Includes checkboxes for 'Attached', 'Detached', and 'Semi Detached'. There are also options to 'Or Not'.
- Common Interest:** Includes a dropdown for 'Freehold/None', 'Condominium', and 'Fractional'. There are also options to 'Or Not'.
- Architectural Style:** Includes a dropdown for '1 Storey/Apt', '1.5 Storey', '2 Storey', and '2.5 Storey'.
- Location:** Includes a 'Map Search' section with a 'Within' dropdown and a 'My Location' button. Below this are fields for 'St #', 'Dir', 'Pfx', 'Street/Island', 'Street Suffix', 'Dir Sfx', and 'Unit #'. There are also dropdowns for 'Region' (Oxford, Northumberland, Ottawa, Parry Sound, Peel, Perth) and 'Municipality/Area' (Woodstock, Ingersoll, Norwich, South-West Oxford, Tillsonburg, Woodstock, Zorra). There are also options to 'Or Not'.
- Neighbourhood/Subdistrict:** Includes a dropdown for 'Woodstock - North', 'Woodstock - South', 'zz-Woodstock', and 'zz-Woodstock - (historical data)'. There are also options to 'Or Not'.
- City:** Includes a dropdown for '10th Line Shore', '1000 Islands', 'Aberdeen', 'Aberfeldy', 'Aberfoyle', and 'Abingdon'. There are also options to 'Or Not'.
- Waterfront:** Includes dropdowns for 'Waterfront Y/N', 'Dock Y/N', and 'Island Y/N'. There are also options to 'Or Not'.
- Water Body Type:** Includes a dropdown for 'Shoreline' and 'Docking Type'. There are also options to 'Or Not'.
- Listing:** Includes a 'Price' dropdown (500-600) and a checkbox for '(000s)'. There are also fields for 'MLS#'. There are also options to 'Or Not'.
- List/Sell Member:** Includes a dropdown for 'List/Sell Brokerage'.
- Property:** Includes a 'Bedrooms' dropdown (5-6) and a 'Total Bathrooms' dropdown (2-3). There are also options to 'Or Not'.
- Garage Y/N:** Includes a dropdown for 'Garage Y/N' and a 'Garage Type' dropdown (Attached Garage, Detached Garage, Underground Parking). There are also options to 'Or Not'.
- Driveway Parking:** Includes a dropdown for 'Boulevard Parking', 'Carport Parking', 'Covered Parking', 'Front Yard Parking', and 'Lane/Alley Parking'. There are also options to 'Or Not'.
- Parking Features:** Includes a dropdown for 'Built-In Garage', 'Compact Parking', 'Exclusive Parking', 'In/Out Parking', and 'Rental Parking'. There are also options to 'Or Not'.

At the bottom of the form, there is a 'Clear' button, a '7 matches' indicator, and buttons for 'Map' and 'Results'.

MODULE 5 (20 MIN)

- Choose the listings that complement your subject property
- Click on "CMA"



Previous Next · 1-7 of 7 Checked 3 All · None · Page Dis

		MLS®#	Status	Current Price↓	Sub Type	Common Interest
<input checked="" type="checkbox"/>		40150015	A	\$549,900	HOUSE	Freehold/None
<input checked="" type="checkbox"/>		40147919	A	\$549,900	HOUSE	Freehold/None
<input type="checkbox"/>		40149086	A	\$550,000	HOUSE	Freehold/None
<input type="checkbox"/>		40144363	A	\$569,900	TOWNH	Condominium
<input checked="" type="checkbox"/>		40142554	A	\$579,900	HOUSE	Freehold/None
<input type="checkbox"/>		40148736	A	\$599,900	HOUSE	Freehold/None
<input type="checkbox"/>		40135549	A	\$600,000	HOUSE	Freehold/None

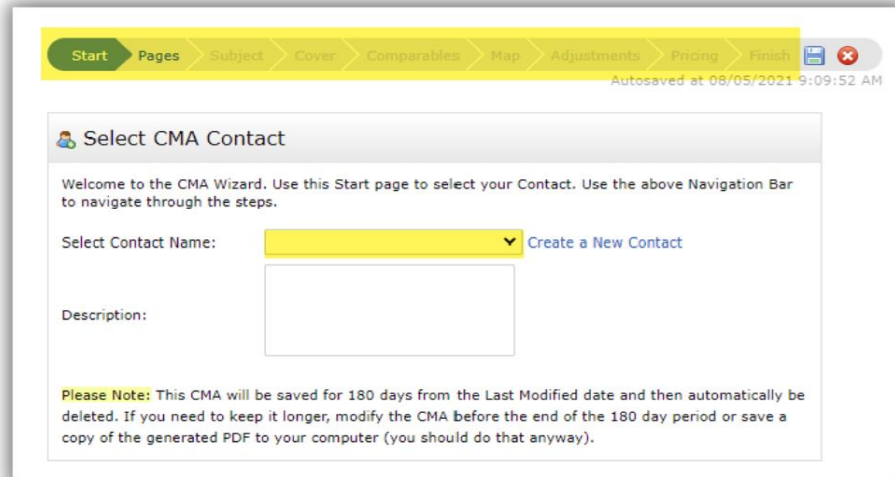
Actions Refine Save Carts

Criteria Email Print **CMA** Directions Stats Export Quick CMA

NOTES

MODULE 5 (20 MIN)

- Complete the CMA using the Wizard
- Select the contact or create a new one
- Work your way through each tab
- Then save



The screenshot shows the 'Select CMA Contact' screen of the CMA Wizard. At the top, a yellow navigation bar contains tabs: Start, Pages, Subject, Cover, Comparables, Map, Adjustments, Pricing, and Finish. Below the tabs, a message reads: 'Welcome to the CMA Wizard. Use this Start page to select your Contact. Use the above Navigation Bar to navigate through the steps.' The main form area has a 'Select Contact Name:' label, a dropdown menu, and a 'Create a New Contact' link. Below this is a 'Description:' label and a text input field. At the bottom, a 'Please Note' section states: '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 status bar at the bottom indicates 'Autosaved at 08/05/2021 9:09:52 AM'.

NOTES

ADDITIONAL INFORMATION

What Each Status Means

Active

The listing is on the market and an offer has not been accepted.

Conditional Continue to Show

This status is used to indicate that there is an accepted offer. However, the conditions are still to be fulfilled and the seller instructs the listing brokerage to continue with showings. This status is treated as active to third-party destinations.

Conditional No More Showings

This status is used to indicate that there is an accepted offer. However, the conditions are still to be fulfilled and the seller instructs the listing brokerage to discontinue with showings. This status removes listings from third-party destinations.

Pending

An offer has been accepted by the seller and all conditions have been fulfilled, but the closing date is in the future. The listing is no longer on the market. Any amendments to the sale terms must be reported to the Association.

ADDITIONAL INFORMATION

Suspended

The listing agreement has been suspended from the MLS® System, but a contract still exists between the seller and the listing brokerage. No showings or marketing can occur on a listing when it is suspended.

Closed

The purchase agreement has been fulfilled or the lease agreement has been executed.

Expired

The listing agreement has expired.

Cancelled

The listing agreement between the seller and the listing brokerage was terminated prior to the expiration date. No showings or other forms of marketing permitted.

ADDITIONAL INFORMATION

What is Available and/or Mandatory

NOTES

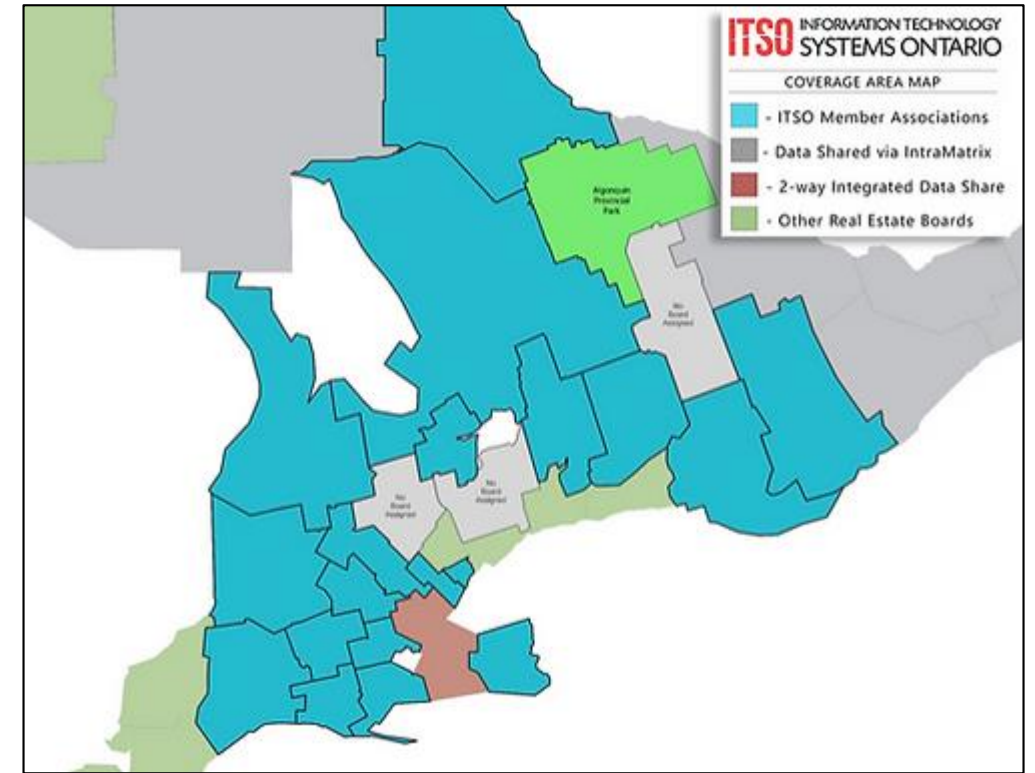
COMMON INTEREST	HOUSE	APARTMENT / CONDO	ROW / TOWNHOUSE	MOBILE HOME
FREEHOLD / NONE	✓		✓	✓
CONDOMINIUM	✓	✓	✓	✓
STOCK COOPERATIVE	✓	✓	✓	✓
LEASE /RENTAL	✓	✓	✓	✓
LEASEHOLD / LEASED LAND	✓	✓	✓	✓
LIFE LEASE	✓	✓	✓	✓
FRACTIONAL	✓	✓	✓	✓
TIME SHARE	✓	✓	✓	✓
OTHER	✓	✓	✓	✓

PROPERTY ATTACHED	HOUSE	APARTMENT / CONDO	ROW / TOWNHOUSE	MOBILE HOME
ATTACHED	✓	✓	✓	
DETACHED	✓			✓
SEMI-DETACHED	✓		✓	

ADDITIONAL INFORMATION

MEMBERS OF ITS0

- Barrie and District Association of REALTORS®
- Brantford Regional Real Estate Association
- Guelph and District Association of REALTORS®
- Huron Perth Association of REALTORS®
- Kawartha Lakes Real Estate Association
- Kingston and Area Real Estate Association
- London and St. Thomas Association of REALTORS®
- Mississauga Real Estate Board
- Niagara Association of REALTORS®
- North Bay Real Estate Board
- Peterborough and the Kawartha Association of REALTORS®
- Quinte and District Association of REALTORS®
- REALTORS® Association of Grey Bruce Owen Sound
- Simcoe and District Real Estate Board
- The Lakelands Association of REALTORS®
- The Oakville, Milton and District Real Estate Board



<https://www.itsosystems.ca/members-of-its0>

- Waterloo Region Association of REALTORS®
- Woodstock Ingersoll Tillsonburg & Area Association of REALTORS®