

## Saved Searches

Your Saved Searches will be converted and migrated into Matrix X the week of **October 19, 2020**. If you do not edit them in Matrix X, they will be updated, if needed, by **December 1, 2020**. Any new Saved Searches added to your existing Matrix system during the parallel period will be added to Matrix X on **December 1, 2020**.

Your Auto-E-mails are imported as Saved Searches, but they are not 'turned on' to send e-mails to your customers. You will need to do this manually. Instructions for this are further down in this document. If you edit Saved Searches in Matrix X during the parallel period, that Saved Search will not be updated again from the existing Matrix system on **December 1, 2020**. It will be assumed that the data in Matrix X is up-to-date and should not be overwritten; even if you make subsequent changes to the search in your existing Matrix system.

All saved searches that have been imported are marked with **(Imported)**. The searches where all search criteria could not be converted are marked with **(Imported\*)**. It is strongly recommended to check each of your Saved Searches to see if you need to modify the criteria. Data is stored in Matrix X in a slightly different manner and there are many more options available to you for searching. Also, some fields were changed which would cause your Saved Search to have **(Imported\*)**.

Any search that was used for an auto-email will have a plus sign at the beginning **(+Imported)**. You will need to enable these as auto-emails. See the auto-email section for more on how to do this.

**To Do: Edit Saved Searches** - It is recommended to check each of your Saved Searches to see if you need to modify the criteria.

- Select **My Matrix > Saved Searches** to view your Saved Searches.
- Click on the Saved Search name.
- Click on **Criteria** to go to the Search screen if you need to modify.
- Click on **Save** after you've made any modifications.
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**To Do: Connect Saved Searches to Contacts** - If your Saved Search or Auto-Email Saved Search is connected to a Contact, it should have converted. However, we strongly recommend you make sure each Saved Search is connected to the proper Contact. A Saved Search does not have to be connected to a Contact, but it's obviously helpful in many situations.

- Select **My Matrix > Saved Searches** to view your Saved Searches.
- Click on the Saved Search name.
- Click on **Settings**.
- Click on the **arrow** in the Contact box to select the appropriate Contact.
- Click on **Save**.
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**To Do: Set up My Favorite Searches** – My Favorite Searches appear on the Home page of Matrix. You can enable up to 10 searches to appear on the Home page.

- Select **My Matrix > Saved Searches** to view your Saved Searches.
- Click on the Saved Search name.
- Click on **Settings**.
- **Check the box** to Enable as Favorite Search on Home tab.
- Click on **Save**.

## Auto-Emails

Since emails are already being sent from the existing Matrix system, Auto-Emails are not being sent from Matrix X until you activate them. Your Auto-Emails have been imported as Saved Searches, but need to be manually activated. Any search that was used for an auto-email will have a plus sign at the beginning of the name (+Imported).

If you need help with your Saved Searches, please see the Searching section below for tips.




**It is recommended that when you turn on an Auto-Email in Matrix, that you turn it off in your existing Matrix system, so your customer does not receive two emails from you.** It is also recommended that you give your customers a heads-up that your MLS system is changing so they will be aware of the change in the look and feel of the information they will see.

**To Do: Enable Auto-Emails** – Follow the steps below to setup an auto-email for your customers and clients from the Matrix X system.

- Make sure you have reviewed your **Contacts** as indicated previously.
- Make sure you have reviewed your **Saved Searches** as indicated previously.
- Make sure you have set up your **Email Signature** as indicated previously.
- Click on **My Matrix, Saved Searches** to view your Saved Searches.
- Click on the Saved Search name.
- Click on **Settings**.
- Click on the link at the top that says **Turn this Saved Search into an Auto Email**
- Edit the information for the Auto-Email.
  - If you choose Daily as the option for sending, there is an AM and a PM option. The AM emails are sent at 8:00 a.m. The PM emails are sent at 6:00 p.m.
- Click on **Save**.

**Note: A maximum of 250 records are returned with a search associated with Auto-Emails. Please make sure the Saved Searches that are enabled do not return more than 250 listings. If the search returns over 250 listings, you will be prompted to edit the Saved Search.**

Once an Auto-Email is setup, the email will be sent to your customer. The status of your Auto-Email will be one of the following:

-  Auto Email is Active, but the Contact has not yet logged in and activated their portal.
-  Auto Email is Active and has been accessed by the Client.
-  Auto Email is disabled by client or agent.

A customer can unsubscribe from just one email, from all emails from one agent, or from all emails from the MLS. If your customer is not receiving an email, make sure they did not unsubscribe from your emails or from the MLS emails.

If an auto-email has been setup and it returns zero listings for 90 days, it will be disabled by the system. Also, if an auto-email is not opened by your client, it will be disabled after 45 days.

CMAs from your old system will not be converted to Matrix. Unfortunately, the way they are stored in the system makes this not possible. If you have CMA's you need, we recommend you save each CMA as a PDF on your computer. Or, you can recreate the CMA with Matrix.

## Help Info for CMA

### CMAs

CMAs from your old system will not be converted to Matrix. Unfortunately, the way they are stored in the system makes this not possible. If you have CMA's you need, we recommend you save each CMA as a PDF on your computer. Or, you can recreate the CMA with Matrix.

There is no limit to the number of CMA's you can have. CMA's with over 180 days of inactivity are purged from the system. Previously, this limit was 120 days.

To create a CMA, follow these steps:

- Click on **My Matrix, My CMA's**
- Click on **Start a CMA**
- You will be walked through the CMA Wizard. This will include the following items:
  - **Start** - Select a CMA Contact
  - **Pages** - Select the Pages for the CMA
  - **Subject** - Select a Subject Property
  - **Cover** - Edit the Cover Information
  - **Comparables** – Search for and add Comparables
  - **Map** - Review Map information
  - **Adjustments** - Make Adjustments to the comparables based upon the attributes of the listings.
  - **Pricing** - Review the Pricing section. Add in your **Suggested List Price and Notes**.
  - **View, Save, Print and/or Email** the CMA as needed throughout the process.

At times, some items in the Wizard may not be available. Certain Pages need to be selected for options to be available. For instance, if you have not chosen a Cover Page to print, the Cover option will not be available.

Also, Custom Displays and Exports you have built in current Matrix system cannot be converted to Matrix X. You will need to rebuild those in the Matrix X beta site to have access to them before Dec. 1 go live date. Video help guides for those can be found here:

Custom Displays: <https://www.youtube.com/watch?v=6jlmRI6IfSs>

Custom Exports: <https://www.youtube.com/watch?v=x1vpIWL50NY>