






MLS Basic Course Handout



Log in to the MLS through <https://stellarmls.com>. Enter your user ID and password provided to you when you joined your local Realtor® Board and/or the MLS. This will bring you to a dashboard with the various products and services offered to you by Stellar MLS. See below for a description of each area of the dashboard along with each tool.

Stellar MLS Account









My Stellar MLS Account	Verify your account information here.
Make a Payment	In the spring when your MLS Invoice is posted, you can come here to pay it.
My Profile	Fill out information about yourself and your business to assist us in sending you tailored communications on the MLS tools that will benefit you.
Class Sign Up	Sign up for a variety of live classes offered at REALTOR® Boards throughout central and southwest Florida.
Class History	View a history of the MLS classes that you have attended.
Customer Support	Contact our Support Center for technical support or for assistance in navigating the MLS Rules & Regulations.




Core Tools

	Product	Description
	Matrix	Matrix is our MLS Database System and is the primary tool we offer. This is where you will enter and search for listings, email listings to customers, and set up automatic emails (where customers automatically are sent listings that match their criteria). There are also tools to track activity in a market area, run market statistics and generate market reports.
	Remine	Through Remine, you can use a variety of data and predictive analytics to hone in on individuals most likely to buy or sell. You then have tools to quickly engage with those individuals, such as the ability to build lists, export data, create labels and send mailers. Remine also offers many third-party integrations to make your life easier.
 	Realist iMapp	Realist and iMapp are both tax and public records databases that serve similar functions, but they are from different vendors and have different interfaces. Agents can choose which of these products to use based on their preference or use both. Realist and iMapp pull from all 67 counties in Florida and have information on virtually every parcel in Florida. Agents can use these tools to: <ul style="list-style-type: none">) Look up property information in public records, run comps, verify flood zones, verify ownership, view market statistics and demographics, etc.) Communicate with their farm area and create mailing lists or labels.
	Transaction Desk & Authentisign	Transaction Desk is an online file management system. Agents can access a variety of residential, commercial, and property management forms, auto-populate these forms from a listing or from the tax records, send them out for digital signatures through Authentisign*, and maintain cloud-based files. *Note: Authentisign offers unlimited digital signings for \$35/year.





	ShowingTime	ShowingTime automates the process for setting and requesting Showing Appointments. Listings agents can use ShowingTime to allow selling agents to securely access entry codes and showing instructions, and to track showing requests. Listing agents can also have selling agents request appointments through ShowingTime, with the listing agent and seller receiving notifications. Selling agents can use ShowingTime to quickly request a showing appointment without having to play phone tag, and in some cases, even automatically receive showing instructions and entry codes through ShowingTime.
	State27Homes.com	State27homes.com is a consumer portal where the public can search for MLS listings. Agents have personalized URLs, allowing them to share branded links with their customers. The customer can search for listings, which will all be branded to the agent who shared the link.
	Go MLS App	The Go MLS App is a mobile app with both an agent and consumer interface. Agents can search for listings, share listings with a customer, get driving directions, contact listing agents, access public records information, and more, directly from their mobile device. If an agent shares the app with a customer, customers can also search for listings on a mobile device, which will all be branded to the agent who shared the app with them.
	Cloud CMA	Cloud CMA allows agents to compile personalized CMA (Comparative Market Analysis) Reports, CMA slideshow presentations, and marketing materials for a listing such as buyer reports, property reports and flyers.
	Down Payment Resource (DPR)	As 70% of Stellar MLS listings are eligible for one or more down payment assistance program, DPR is a great tool to assist agents in identifying Down Payment Programs for which a property might qualify. There is a DPR button on top of all listings in Matrix that may qualify for Down Payment Assistance, and there also is a lead generation tool that an agent can place on his or her web site or social media pages.
	ListTrac	ListTrac gives listing agents analytical tools to track and market their listings. First, through ListTrac, reports can be run on the exposure a listing is receiving on various third party and IDX sites. Second, ListTrac has marketing tools such as direct URL's to a listing on State27Homes.com, a QR code, and a text-in number where a potential buyer can get the listing's State27Homes.com link texted to them.
	Data Coop	Data Coop pulls together a wide variety of reports from both the MLS and Tax Records. There is a Data Coop link in each Matrix listing, and agents can search for an unlisted property directly in Data Coop as well.
	HomeSnap	This mobile app allows agents to search for listings on the go, snap a picture of a property to link to either the MLS listing or public record (based on location settings in phone), see market activity reports, generate instant CMAs, and communicate listing and market information to customers. When an agent shares the app with a customer, all information the customer finds will be branded to the agent.
	SmartCharts	SmartCharts integrates residential MLS statistics into an easy-to-present format. Agents can drill down to zip code and run gauges, charts, and reports for selected market stats. HTML code is provided to display these stats on the agent's web page and to automatically refresh them. There is a free, basic version of SmartCharts which pulls stats for the entire MLS, but the Pro version has an extra cost.

Additional Benefits


	Product	Description
	Builders Update	New home construction accounts for about 10% of inventory nationwide, and it is anticipated that 77,000 to 107,000 new homes will be built in Florida each year for the next 10 years. However, not all new construction is in the MLS and there is sometimes a disconnect between the Real Estate and Building Industries. Builders Update in a national database of new construction. In addition to search features, agents have a link to a branded site where their customers can search for new construction.
	eProperty Watch	Surveys consistently show that a substantial amount of a seasoned agent's business comes from referrals and repeat business from past customers. eProperty Watch allows you to send both past and prospective customers a monthly report full of information on their home and neighborhood, with up-to-date information on their home's value, nearby listings and transactions, local trends, and more.
	ReTechnology	Stellar MLS subscribers automatically receive a Premium Membership to the ReTechnology site. This site has product reviews for a wide variety of categories in Real Estate Technology, a library of articles for both agents and brokers, and access to several webinars.
	MFCRE	My Florida Commercial Real Estate (MFCRE) is a commercial information exchange. While Matrix contains limited commercial listings, MFCRE gives agents access to commercial listings nationwide from Realtor® boards that use a Catalyst Information Exchange (including some of the local Commercial Realtor® Boards). MFCRE has a free consumer web site where the public can find listings from MFCRE members, but agents can pay an annual fee to have the ability to enter commercial listings into MFCRE and to have full access to listings from other commercial boards. <i>**Note that MFCRE is an information exchange and not a Multiple Listing Service. There are no guaranteed offers of compensation. An additional cost applies for MFCRE.</i>
	My Flood Status	Order a certified and insured flood zone determination for any property. This is especially helpful for properties that are in multiple flood zones to determine whether or not the structure is in a Special Flood Hazard Area. Reports cost \$25/each and come with \$2 million of E&O Coverage. A monthly membership is also available for \$25/month offering 10 reports per month.
	MyRental	Stellar MLS participants and subscribers receive a discount on MyRental's packages for leasing agents and property managers. Services include eviction histories, previous address history, criminal background checks (including terrorist alert and sex offender checks), credit reports, and tenant scores.
	New Home Source Professional	Like Builders Update, New Home Source Professional is a national database of New Construction. Some Builders submit inventory to Builders Update, some to New Home Source Professional, and some to both. Like Builders Update, New Home Source Professional also gives you a branded site to allow your consumers to search for new construction.
	Property Panorama	Through Virtual Tours, you are able to turn your listing photos into an animated, immersive experience. Property Panorama offers a free virtual tour is available for every listing entered into the MLS with up to 5 photos, but through a discounted paid subscription you can create customized virtual tours with up to 25 photos, along with flyers and other marketing materials.

	Proxio	Stellar MLS provides all participants and subscribers with a complimentary membership to the Proxio site. Listings are added to an international database with over 3 million listings worldwide. International developments can be promoted, agents can network with 650,000+ agents from around the globe, and agents can get a free web site/profile on Proxio.
	Rate Plug	Through RatePlug, agents can send customers flyers on a listing with mortgage options from up to 3 preferred lenders. This tool is free for agents, but lenders pay a licensing fee. RatePlug is compliant with disclosure laws and can be a valuable tool for residential agents working with buyers who will use financing.
	RealBiz Media	RealBiz Media offers Stellar MLS subscribers a discount on this virtual tour and video marketing service. Virtual Tours can syndicated to major third party consumer sites and to your social media channels.

Stellar Education

	University	A variety of online training resources are available at the Stellar MLS University site, including online versions of our live classes and several product demos and tutorials. These tools are available 24/7.
	Class Sign-Up	Sign up for a variety of live classes offered at Realtor® Boards throughout central and southwest Florida. These classes do not count for CE credit but are designed to assist you in optimizing your use of MLS tools and in growing your business. There is no cost to attend these trainings.
	Rules and Regulations	Review the MLS Rules & Regulations to ensure that listings contain accurate data and maintain the cooperative nature of the MLS.
	Training Videos	Watch brief videos on how to maximize your use of MLS Products.

Matrix Navigation

When you first launch Matrix, you are brought to the home page. The home page has several widgets, which give you a snapshot of your activity in Matrix. These widgets can be re-arranged by hovering over the header until you see the gridline symbol . You can then click and drag to move the widget. You can also minimize a widget by hovering over the corner and clicking the [X] icon. When you minimize a widget, it goes into the “Additional” area on your home page and can be dragged back onto the page at any time.

Home Page Widgets

News & Alerts – Stellar MLS posts updates here, which could include information on system enhancements, new products, rule changes, upcoming trainings, etc.

Market Watch – This tool tracks changes to your market area over a specified time period. You have a Market Watch for each type of property (residential, commercial, rental, etc.), and can set the time frame to 24 hours, 3 days, or 7 days.

- J By default, the Market Watch pulls all MLS status changes over that time frame, but if you click customize, you can set a specific market area.
- J Under the Market Watch widget, you can click on each type of status change to see the new listings, price decreases, recent pending listings, recent sales, newly expired listings, etc. for your area over the time frame you select.

Hot Sheets – Similar to Market Watch, Hot Sheets also allow you to track changes to your market area. However, instead of drilling down to a particular status change type for a single market area, Hot Sheets give you a master list of all status changes for up to 10 market areas.

- J As a default, you have a Hot Sheet for each type of property (Residential, Commercial, Income, Vacant Land, Rental, and Cross Property). By clicking "Customize", you can rename, edit, or delete existing Hot Sheets and create new Hot Sheets. To create a Hot Sheet, once you go to the Customize link, select "Add".
- J Choose the type of property for the Hot Sheet (Residential, Vacant Land, Rental, etc.), and then name the Hot Sheet. Once the Hot Sheet is named, then click "Edit Criteria" to program the Hot Sheet for your market area. When finished, click "Done".
- J Once you are back on your main page in Matrix, go to the Hot Sheets widget and select your newly created Hot Sheet and desired time period for a list of changes.

My Favorite Searches – When saving a search in Matrix, there is an option to have the search appear under the “My Favorite Searches” widget. Up to 10 saved searches can appear here.

My Listings – Here you can access your Active, Incomplete, Pending, expiring and recently closed listings, along with listings from your office.

My Carts – You can save particular listings into your personal cart, or a cart for one of your customers, and then access the carts from here.

My Stats – Under the Stats tab, you can run various market statistics and then save the stats presets here.

Concierge – When creating an auto email in Matrix, there is a setting for Concierge Mode. If this is selected, when a new listing hits the market matching a customer’s criteria, the agent gets notified first, and then reviews the listing to decide whether or not to send it to the customer. Listings in Concierge mode are reviewed under this widget.

Recent Portal Visitors – When a listing is emailed to a customer in Matrix, the customer is sent a link into an interactive portal to view the listing and can mark the listing as a favorite or possibility. This widget shows which customers were recently in their portal, and if they favorited or marked any listings as possibilities.

Recent Use Contacts – This widget shows which Matrix contacts have recently had their records updated or have been emailed.

Contact Requests – Matrix offers agents an Agent Web Page, and one of the elements of that page is a Contact Request form. If a consumer fills out a contact request, information on that request will show up here.

External Links – A variety of commonly accessed hyperlinks can be found here, including links to MLS forms, other MLS tools, RPR, Florida’s 55+ Directory, MFRMLS University, the MFRMLS Rules and Regulations, etc.

Additional – If you minimize a widget, this is where it shows up until you drag it back on your home page.

Menu Tabs in Matrix

The following tabs can be found across the top of the page in Matrix.

Home – This will return you to the Home Page.

Search – Under this tab, a wide variety of searches can be run.

Then use the “And”, “Or”, or “Not” radio buttons to indicate if you want all of the options to be true [And], one of the options to be true [Or], or none of them to be true [Not].

Price

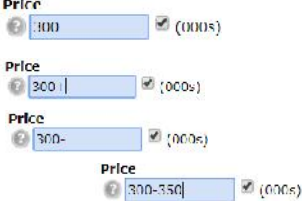
For most search forms (except for rental), prices are in thousands. There are four ways to search for listings by price.

Exact Number: For a property that is exactly \$300,000, enter 300.

Minimum: For properties that are \$300,000 or more, enter 300+.

Maximum: For properties that are \$300,000 or less, enter \$300-.

Range: For properties between \$300,000 and \$350,000, enter 300-350.



Bedrooms and Bathrooms

Other numeric fields such as Bedrooms, Bathrooms, Square Ft Heated, and Year Built work the same way as the price field. You can enter an exact number, minimum, maximum, or range.


For example, for exactly 3 bedrooms, enter 3. For 3 or more bedrooms, enter 3+. For 3 or less bedrooms, enter 3-. For 3 to 4 bedrooms, enter 3-4.

For bathrooms, there is a field for Total Bathrooms but also separate fields for Full and Half Bathrooms. For the Total Bathrooms field, enter the whole number of combined Full and Half Bathrooms desired. For example, 3 could mean either 2 full bathrooms and 1 half bathroom (3 total) or 3 full bathrooms and 0 half bathrooms (3 total).

Geographic Fields

In the center of the search forms, you can search by a variety of geographic fields, including address, county, zip code, city, or subdivision.

County: Select the counties where you are searching for listings. To select more than one county from the pick-list, hold down the Control key (or Command key in a Mac).

MLS Zip: Either type in the zip code(s) or click the search icon  to search for zip codes by city. To type in more than one zip code, put commas in between them. If you would like to exclude a zip code from your search, use the Not button underneath the zip code field.

City: Enter the city or cities where you are searching for properties. To search in more than one city, separate the city names with commas. To exclude a city, type in an exclamation mark (!) before the city name.

Searching for Multiple Cities:

Excluding a City:

City

City

Subdivision:


You can drill your searches down to a particular subdivision, but make sure you know the proper name of the subdivision. Sometimes less is more. Suffixes such as “Ph 2” might narrow your search down too much. You may want to consider putting an asterisk on both sides of the subdivision name. This is a wild card search, and will pull any listings meeting your other criteria that contain that subdivision name. For example, if you enter *Palmer Ranch*, that would pull listings in Arielle at Palmer Ranch, Mira Lago at Palmer Ranch, etc.


Legal Subdivision Name


Instead of using the geographic fields, you may prefer to conduct a map-based search. This gives you the flexibility to draw the exact areas on a map where you wish to conduct a search. Be careful that the criteria on your search form does not cancel out the area you draw on your map. For example, if you have Volusia County selected on your search form and then draw a map area in Seminole county, no results will show up. On the top right corner of the map, there is a “Jump to Address” bar. In this bar, you can enter a city, zip code, or specific address/location, and the map will be centered based on the criteria entered.





There are multiple map tools on the top of the screen.


Inrix Drive Times  - By clicking on the INRIX icon in the map in Matrix, you can set up a map-based search based on estimated drive times to or from a location at a set time of day.

Radius Drawing Tool  – Center your map on a specific location, and then draw a search radius from that location. For example, your buyer wants to be 3 miles from their work.


Rectangle Drawing Tool  – Draw a rectangle on the map to find all listings matching your criteria within that rectangle.

Polygon Drawing Tool  – Draw a polygon, tracing specific boundaries. Click on your starting point on the map, and then click on each corner. Always end your shape at the same point where you started it. When you click the red dot that starts/ends your shape, you have the option to include or exclude that shape from your map.

Freehand Polygon  – This is ideal for tablets or touch screens. It allows you to trace an area on the map.

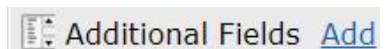
Clear Map Shapes  – Erase the shapes you drew on the map.

Map Layers  – Add layers for Flood Zones, Zip Code Boundaries, neighborhoods, etc. to your map.

Recenter Map  – Recenter your map on a new location.

Adding Additional Fields


On the bottom of each search form, there is an option to add additional fields.



If you click "Add", you are given a list of all available fields in Matrix, and can select which fields you want added to your search form. You can then select fields from an available list (or use the search bar to search for a field by name), click the "add" button, and click "back" to return to the search form to enter your criteria. This is discussed in our “Working with Buyers Class”.

Results Grid and Listings

Once all of your search criteria is entered, click the “Results” button on the bottom of your search form. This will pull up your results grid. Results can be sorted by a column by clicking on that column header, or

manually re-ordered using the drag-and-drop icon  (as long as all listings appear on one page). There are several icons on the results grid. You can hover over these icons to see what they do.



 = View Listing Photos

 = View Listing Centered on Map

 = View MLS History for this Property ID

 = View Attachments







-  = See mortgage payment scenarios through RatePlug
-  = Access Down Payment Resource
-  = Public Records Reports through Realist
-  = Public Records Reports through iMap

From the results grid, you can also get a quick glance at the MLS number, status, Address, Subdivision, Heated Square Feet, Price, Bedrooms, Bathrooms, Year Built, Pool, Garage, etc. of each listing.

By clicking on a MLS ID, you can enter the listing. The default display is the Broker Synopsis, but this can be changed under the “Display” pulldown menu. There are various customer displays and flyer displays available. The Broker Synopsis is divided into the following parts:

-) Summary Section – Photos, County, Subdivision, Status, Price, Bedrooms, Bathrooms, Days on Market, Square Footage, etc.
-) Land, Site, and Tax Information – Taxes, Legal Description, Lot Size, Water Frontage/Access/View, etc.
-) Interior Information – Utilities, Interior Features, Room Dimensions & Features, etc.
-) Exterior Information – Exterior Construction, Roof, Exterior Features, etc.
-) Community Information – HOA/Condo Fees, Pet Restrictions, Lease Restrictions, Community Amenities
-) Realtor Information – Listing Agent/Office, Listing Type, Offer of Compensation to Cooperating Brokerage, Showing Instructions, Driving Directions, Realtor Remarks

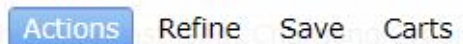
On top of the report, there are several buttons. Some of these are the same buttons you see on the results grid, but there are a few additional tools here. These include:

-  **Tour 1** Virtual Tour (If available)
-  Request a Showing
-  **Co op** Data Coop Reports
-  **Mc** Market Conditions Report (showing how market trends have changed over the past year)
-  **fs** Launch a transaction file through Form Simplicity
-  **TD** Launch a transaction file through Transaction Desk

To return to the results grid, click on the link that says, “Agent Single Line display.”

Working with Search Results

Underneath the results grid, there are four menus, each with buttons to perform different actions.



Actions Menu Actions

The Actions menu features functions such as emailing, printing, running driving directions, launching a CMA wizard, running statistics, exporting, requesting bulk showings, and creating Custom PDF Reports.

-) Email: Send a one-time email with selected listings. Customers are sent a link into their Customer Portal (discussed in next section) to view the listings. This is not an automatic email where the customer will be sent updates from the system. To set up an automatic email, go to the Save menu.
-) Print: Print selected listings. You can choose a variety of displays to print and select whether or not to include a header and footer. Listings can be printed to paper, printed to PDF, or emailed as a PDF from this button.
-) CMA: This button does not produce a CMA for an individual listing. Instead, if you search for comps for your subject property, you can select multiple comparable listings and then click this button to launch a CMA wizard. (Discussed in CMA Tools class.)

-) **Directions:** Run driving directions between listings. Reorder the listings and add custom starting or stopping points. Print the directions or email them directly to your customer.
-) **Stats:** Run summary statistics on the listings in your search
-) **Export:** Export the results grid into Microsoft Excel
-) **Quick CMA:** Like the CMA button, this button requires you to search for comps for your subject property. If you select the comps and then click Quick CMA, a basic PDF report will be created showing each comp (sorted by status) and giving summary statistics by status. This is covered in our CMA Tools class.
-) **Cloud CMA:** This is similar to the CMA button but launches a CMA wizard through the Cloud CMA product. This is covered in our CMA Tools class.
-) **ShowingCart:** Launch multiple listings into ShowingTime to request showings.
-) **Custom PDF Reports:** Create a custom PDF report.

Refine Menu

The refine menu allows you to narrow your search and to also see which contacts you have already sent listings.


-) **View As:** Select a contact from the pulldown menu to see if you have already emailed that contact any of the listings from your search.
-) **Show Selected:** Narrow your search to only the listings you select.
-) **Discard:** Discard any listings you select.
-) **Sort:** Sort your results by multiple levels.

Save Menu

The Save menu allows you to save a search, create an Auto Email, or create a Speed Bar Shortcut.

-) **New Saved Search:** Save the criteria of this search to run in the future. Note that when the saved search is run later, the most up-to-date results matching that criteria would be pulled. There is a check box to enable the search as a favorite on the Home tab, if you want this search to appear on your home page of Matrix.

-) **New Auto Email:** Set up an automatic email. Your customer will not only be emailed the initial search results, but will also be sent updates when a new listing hits the market that matches their criteria.

Select your contact and choose whether or not you want to be BCC'd on the email. Enter a subject. For the welcome and recurring message, you are given default text, but are able to modify the text. The welcome text is what goes out with the first email. The recurring text goes out in subsequent emails. To set your custom text as a new default, click on the gear icon in the bottom corner of the text box. 

Under the Settings section of the auto email wizard, if you select "Enable Concierge Mode", any listings will be sent to you first for approval. If this is not selected, the Schedule section will appear where you can select if you want emails to go out ASAP, Daily, or Monthly.

There are also display options to Enable as a Favorite Search on Home Tab (if you want to search behind this email to appear on your home page Favorite Searches widget).

-) **Speed Bar Shortcut:** Create a shorthand name for this search that can be used in the Speed Bar on top of the screen in Matrix.

Carts Menu

Under the Carts menu, you can create a “cart” and save listings in that cart. Multiple carts can be created. A cart can be tied to a customer record, but customers cannot see listings you place in a cart. Carts serve as a file folder for listings you want to view later, and the listing will always show up in the most up-to-date status. Carts can be accessed from the Matrix Home Page under the “My Carts” widget, or under the “My Matrix” tab under “My Carts”.

Customer Portal





When you email a customer through Matrix, the customer is sent a link into their portal site. The portal is automatically generated when you send an email, but the next section of this handout will discuss how to personalize your customers’ portal sites with your information.

The portal has five tabs:

Find a Home – Your customer can conduct and save their own searches here. Anything they find will be branded to you. My Searches – Here is where your customer will access the results to searches/emails that you have set up, along with the results of their own saved searches. Favorites – Here is where your customer can access the listings they marked as a favorite.

Messages – Here is where your customer can access any notes they left on a property and your replies to those notes. My Agent – Here is where your customer can see your portal information (to be discussed in next section) and portal greeting. When the customer first goes to their portal, they are brought to this tab. When your customer goes to view listings in the portal, they are given a thumbnail display. By clicking on the address of the listing, they can see the Customer Synopsis Report. Only the customer-friendly displays are available in the portal, without any listing brokerage information, showing instructions, etc.

By clicking the heart icon  in the thumbnail display, your customer has the ability to favorite a listing

, mark it as a possibility , or discard a listing . Within the listing, there is a notes section for your customer to leave you a message  through the portal. You can set up notification preferences to be notified when your customer uses one of these portal functions.

Remember, under the Recent Portal Visitors widget on your home page, you can see which of your customers have recently been in their portal sites, and if they favorited any listings or marked listings as a possibility.


Under the My Matrix tab, if you go to your Contacts, you can see each of your contacts’ last portal visit, along with any listings which they favorited, marked as possibilities, discarded, or annotated.

If you go to My Matrix and then to Settings, you can set up “Portal Notification Settings”. You can be notified by email, text or daily email summary when a customer visits their portal, saves a favorite, saves a possibility, discards a listing, leaves a note, etc.

Personalizing Matrix

Adding a Photo to Add/Edit Tab - All agents have a profile picture in Matrix, which goes out to the MLS Agent Directory, State27homes.com, the MyMLS App, and Data Coop. To add or edit a profile picture, go to the Add/Edit tab and select “Edit Agent Roster”. Type in your agent ID. You are then able to upload or change a photo.

My Matrix/My Information – Under the My Matrix tab, there is a My Information section where several additional personalization settings can be configured. These are described below.

- J Information – Your name, title, phone, office, email, web site, tagline, etc. can be updated here. Please note that if your name or contact information ever change to ensure that your local Realtor® board has your most up-to-date information on file as well. The information here is only what shows up in the customer portal, not on listings and external products.
- J Header & Footer – Create a header to show up in your customer’s portal and on your agent web page. Select from a variety of default headers or upload a custom header. Upload a photo to appear in your header. Choose up to five lines of text to appear in your header, and set the background color, text color, and transparency level of the background color. Then choose whether or not you want to include a footer, and if so, choose up to four lines of information to include in the footer along with the footer color scheme.
- J CMA Cover Sheet – Create a cover sheet for when you develop CMAs through the Matrix CMA wizard. Upload a photo and add your information.
- J Email Signature – Create an email signature for when you email listings out through Matrix. If you would like to add a photo to your email signature, click the image icon.  You can either select the image from your CMA Cover Sheet tab, or link to the URL of an image hosted on an external site.
- J Agent Webpage – Matrix gives you a free web page template. This is discussed in the MLS Marketing Tools class.
- J Portal Profile – Upload a photo to appear in your customers’ portal sites. Update the greeting that appears on the portal home page. Choose if you want your listings or your office’s listings to appear on the portal home page. Add a YouTube video link and select which items of contact information you want to have displayed.

Matrix Getting Started Checklist

After completing this course, you are encouraged to spend some time completing the following tasks in Matrix.

- Complete your Profile under the “Stellar MLS Account” section of the login dashboard.
- Upload your Photo to the Add/Edit tab
- Personalize your Matrix settings by progressing through the tabs on the My Matrix/My Information area
 - Information
 - Header
 - CMA Cover Sheet
 - Email Signature
 - Agent Web Page (if you plan to utilize this tool)
 - Portal Profile
 - Photo, Portal Greeting, Inventory Slideshow Options, Video (if applicable), Contact Information
- Set up your Portal Notification Settings under the MyMatrix tab (under Settings)
- Rearrange the widgets on your Matrix home page
- Customize your Market Watch and Hot Sheets
- Add contacts to Matrix
- Run searches in your farm area and save them to the My Favorite Searches Widget on your Matrix Home Page
- Practice emailing a listing to yourself. Click on the portal link in the email you send yourself to explore how the portal works.