



Client Management in Matrix User Guide

MetroTex Association of REALTORS®

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Process Overview

One of the most popular features of NTREIS Matrix is the ability to set clients up on a drip email that will automatically send new listings that match that client's specifications.

The following pages will outline the process in great depth, but first it is important to grasp the major steps and terminology.

First, a **Search** is created in Matrix using the client's specifications.

3 plus bedrooms, 2 plus baths in Plano from 250k – 350k

3+ acres of raw land within 5 miles of Texas Motor Speedway

2 bed 2 bath rental in Highland Park ISD

Once the **Search** is created, from the **Results** screen, all listings that currently match the criteria must be vetted. Any listings selected (or checked) become the initial set of listings sent to the client.

After the desired listing are checked, the **Save** option is selected. From the **Save** menu, **New Auto Emails** is selected.

A new window opens, and the agent enters or selects the **client**, enters the **title** of the email and selects the **frequency** of the emails. When the page is **Saved**, that starts the emails to the clients.

In short:

- Search
- Results – Select the listings
- Save – New Auto Emails
- Who is the recipient?
- What will the email be titled?
- When (frequency) will the email be sent?
- Save



Auto Email to Clients / Prospects

Criteria Map Results

Previous · Next · 1-10 of 31 Checked 10 All · None · Page Display Agent Single Line at 10 per page

	ML #	Status	Area	Address	Subdivision Name	Sq Ft	Total Beds	Baths	GAR/CP/TC	Acres	Pool	Current Price
<input checked="" type="checkbox"/>	TX 12114905	Active	10/2	23 Ash Bluff Lane	Glen Abbey At Ash Bluff 02	18,589	7	7/2	5/0/5	2.869	No	\$6,600,000
<input checked="" type="checkbox"/>	TX 11989664	Active	11/9	5300 Royal Lane	Lobello Estates	9,452	7	8/2	3/0/3	2.800	Yes	\$3,400,000
<input checked="" type="checkbox"/>	TX 12080876	Active	11/13	9520 Hathaway Street	Venetian	11,272	7	9/1	4/0/4	1.440	Yes	\$4,739,000
<input checked="" type="checkbox"/>	TX 11881447	Active	11/8	4939 Manson Court	Perot Estates Rev 02 Ph 01	29,196	10	9/4	9/3/9		Yes	\$29,995,000
<input checked="" type="checkbox"/>	TX 12070023	Active	12/11	5323 Swiss Avenue	Munger Place	11,261	7	8/3	3/0/3	0.780	Yes	\$2,999,500
<input checked="" type="checkbox"/>	TX 12144577	Active	12/7	6835 Westlake Avenue	B E Miller	9,221	8	8/2	0/1/1	1.235	Yes	\$3,995,000
<input checked="" type="checkbox"/>	TX 12147177	Active	20/1	3201 Hunter Lane	Oakbrook Estates	7,700	7	6/1	4/0/4	1.080	Yes	\$2,495,000
<input checked="" type="checkbox"/>	TX 12101774	Active	20/1	5236 Runnin River Drive	Lakeside On Preston #1c	10,055	7	7/1	4/0/4	1.780	Yes	\$3,350,000
<input checked="" type="checkbox"/>	TX 12053606	Active	20/1	5500 Cavendish Court	Willow Bend Place	14,500	7	9/3	6/0/6	5.190	Yes	\$6,900,000
<input checked="" type="checkbox"/>	TX 11977259	Active	25/15	3620 Maplewood Avenue	Highland Park	8,340	7	8/2	4/0/4	0.313	Yes	\$4,999,000

Actions Refine Save Carts [1] 2 3 4 · Previous · Next

New Saved Search **New Auto Email** New Speed Bar Shortcut

To have the system generate listings emails to clients, first a search needs to be created. Once the initial listings are selected/checked, **Save** can be selected, then **New Auto Email**.



This opens the Auto Email dialog box.

 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 - those I send you manually as well as those I set our system to send you automatically - 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 I've prepared for you in several different formats. For your convenience, you'll be able to sort these listings and categorize them. You'll be able to see all associated
[Check Spelling English](#)

Signature: **Sample Agent, REALTOR®**
MetroTex Association of REALTORS®
<http://www.dfwre.com>
 555-555-5555 (cell/text)
 See my listings at:
<http://innovia.ntreis.net/ntr/idx/index.php?key=7356cfa1b2ba58a8092f0eda9f7cff3>


[Edit Your Signature](#)

Language:

 Criteria:

 This page saves the below Search Criteria (70 Listings, plus all new matches) as an Auto Email, *not the 25 checked Listings.*
 Property Type is 'Residential'
 Status is 'Active'
 Beds Total is 7+

 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 type="checkbox"/> All PM	<input type="checkbox"/> PM						

 [Clear](#)

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

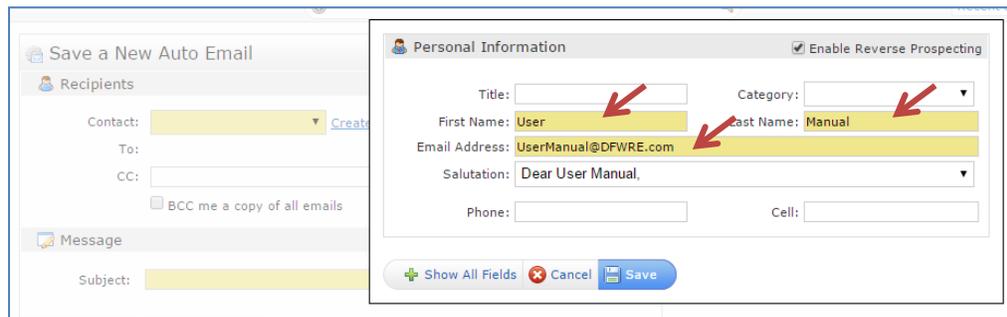
Cancel
Save



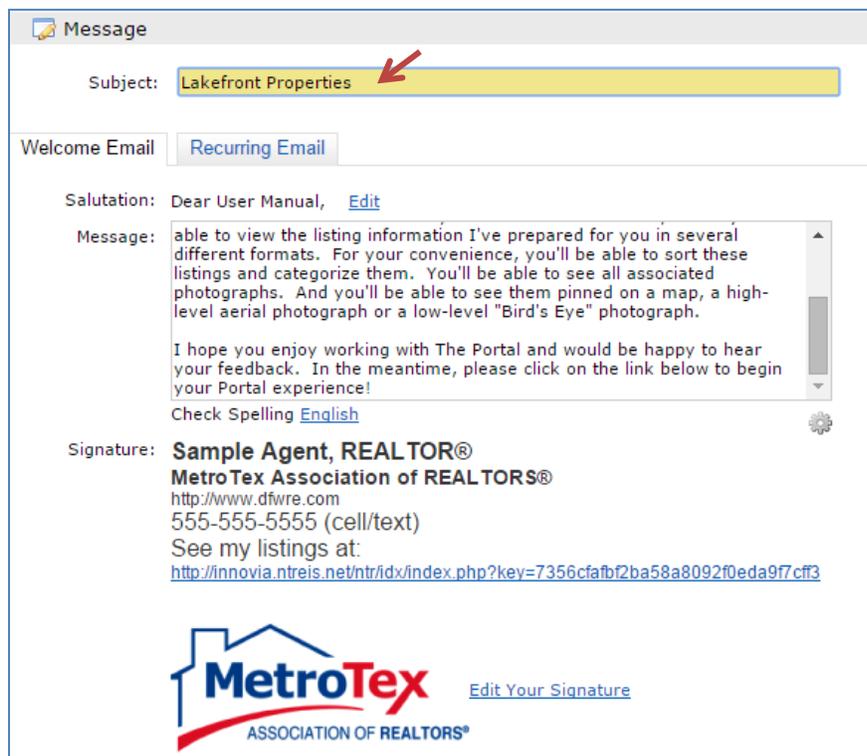
Either an existing contact may be chosen by selecting the down arrow and choosing from a list,



or a new contact may be created. First name, last name and email address are all required fields. More than one email address can be added by using commas to separate them.



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 changed by entering new text in the **Message** field.





Under Settings, the system defaults can be changed.

 **Settings**

Concierge: Enable concierge mode

Show this contact in Reverse Prospecting results

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

Enable Concierge Mode sends the listings to the agent to select/review before sending the listings to the client.

Reverse Prospecting allows listing agents to see which buyer’s agents have sent their listing to clients. The listing agent would only see the buyer’s agent’s contact information, not the client’s information.

Enable as Favorite Search saves the search for immediate access on the home screen.

 **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 type="checkbox"/> All PM	<input type="checkbox"/> PM						

 [Clear](#)

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

 Cancel
 Save

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.

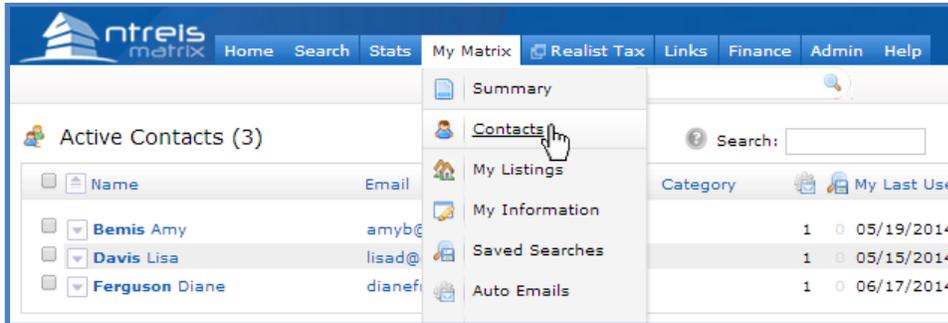
Once the information is saved, the system will start sending the emails.

A brief overview of the Auto Email system is available at the MetroTex Matrix page www.MyMetroTex.com/mls-support or directly from YouTube <http://goo.gl/YJ2N0U>



Client Activity Management

The activity of all contacts can be accessed from **My Matrix / Contacts**.



The contacts are listed.

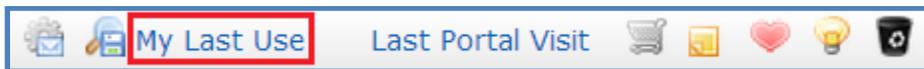
Active Contacts (3)		Search:	Filter Contacts:	... choose a filter					
Name	Email	Category	My Last Use	Last Portal Visit	Shopping Cart	My Last Use	Lightbulb	Trash	Ref#
Bemis Amy	amyb@dfwre.com	1	05/19/2014	06/09/2014	0	3*	2	0	8
Davis Lisa	lisad@dfwre.com	1	05/15/2014	05/29/2014	3	0	0	0	0
Ferguson Diane	dianef@dfwre.com	1	06/17/2014	06/18/2014	3	2	7	4	5



The first icon indicates the number of active Auto Searches.



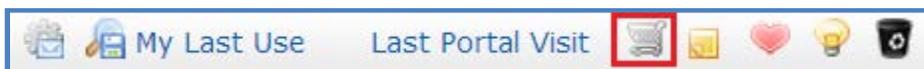
The second icon counts saved searches attached to the client.



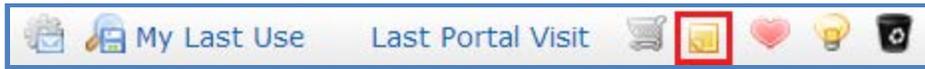
My Last Use is the date the agent last changed the client's settings.



Last Portal Visit is the date the client last accessed his/her portal.



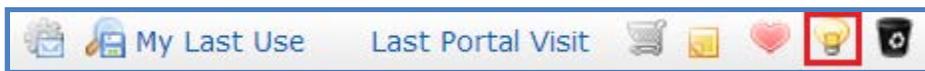
The shopping cart indicates the number of listings in the client's cart.



The sticky note indicates the number of notes that the client has made about listings that the agent has not yet read.



The heart is the number of listings a client has marked as “liked.”



The light bulb is the number of listings a client has marked as “possible.”



The recycling bin is the number of listings a client has marked as “rejects.”

 **Bemis Amy** amyb@dfwre.com

 Portal Activity (8)

 Auto Emails (1)

 Sent Email (8)

[Edit Contact](#) [Delete Contact](#) [Start CMA](#) [Open Portal](#) [Open Cart](#)

The down arrow next to the client’s name can be selected to see the client’s portal details.



Portal – Agent Version

Selecting **Open Portal** will display the client’s welcome screen. NOTE: The version of the portal that can be accessed from My Contacts is the **Agent Version**. Agents can make notes about the properties, but most of the client functions are reserved for the Client Version which can only be accessed from the client’s email.

40 Braewood Place

MLS#: 12136732
 Status: Active
 Price: \$6,975,000
 SqFt: 11,090
 Beds: 5
 Bath: 8/0

Selecting the **Properties** tab will display the list of properties sent to the client.

Chg Type	MLS #	S	Address	SqFt Total	Yr Built	Beds	Baths	Parking Space:	Lot Size	Current Price
New Listing	12164104	A	1010 W Fm 1885	6,175	1988	5	4.1	2/1/3	146.00	\$4,250,000
Price Increase	11770344	A	10240 Strait Lane	11,151	1959	5	6.2	3/2/2	3.58	\$7,300,000
Sold	11812949	S	10660 Strait Lane	14,748	2001	8	7.4	4/0/4	4.70	\$8,240,000
	11881447	A	4939 Manson Court	29,196	2009	10	9.4	9/3/9		\$29,995,000
	11903056	A	5 Stonebriar Way	10,919	1987	6	8.2	3/2/5	10.34	\$7,775,000
Price Decrease	11939319	A	3828 Turtle Creek Drive	6,717	1926	3	4.2	0/0/0	2.17	\$12,900,000
Price Decrease	11952147	A	424 FM 875	0	1975	0	0.0	0/0/0	2,967.22	\$13,950,000
Price Decrease	11952869	A	9806 Inwood Road	14,139	1996	6	7.3	9/0/9	5.32	\$14,999,000
	11959332	A	0 Lakehurst Ranch	7,231	1987	4	5.2	3/0/3	415.55	\$7,350,000
	11977303	A	0 Lakehurst Ranch	7,231	1987	4	5.2	3/0/3	415.55	\$7,350,000
	12043258	A	3806 University Boulevard	11,681	1998	6	7.4	2/0/2	0.93	\$10,950,000
Price Decrease	12063400	A	3516 Beverly Drive	9,084	1997	5	5.2	3/0/3	0.36	\$7,900,000
	12072238	A	8496 County Road 97	15,000	1995	4	5.3	7/0/7	314.00	\$15,000,000
New Listing	12095615	A	3800 Beverly Drive	8,938	1922	4	5.3	4/0/4	0.85	\$14,500,000
New Listing	12097506	A	9861 NW County Road 1260	3,700	1997	5	4.0	5/5/5	3,146.00	\$9,438,000
New Listing	12105577	A	4511 Watauga Road	13,713	2013	6	6.3	4/0/4	1.03	\$7,500,000
New Listing	12107208	A	9639 Hollow Way Road	14,072	1989	6	7.3	3/0/3	2.00	\$11,995,000
New Listing	12111435	A	8851 HCR 4402	2,737	2010	2	2.1	3/0/3	690.00	\$9,250,000
New Listing	12112113	A	4205 Lakeside Drive	11,172	1922	5	7.2	4/0/4	0.76	\$8,500,000
	12128861	A	7704 President GB Hwy Hirshau	5,232	1999	4	3.3	4/0/4	31.40	\$8,624,880



Portal – Client Version

The client will receive an email from the agent via: postmaster@matrixmail.ntreismls.com. The client will be invited to click on a link to see the listings.

Added/Chgd	Chg Type	MLS #	S	Address	SqFT Total	Yr Built	Beds	Baths	Parking Spaces	Lot Size	Current Price
04/22/2015	New Listing	13135063	A	5922 Mapleshade Lane	3,552	1985	4	2.1	3/0/3	0.23	\$474,900
04/22/2015	New Listing	13134569	A	6511 Garlinghouse Lane	2,319	1981	3	2.1	2/0/2	0.18	\$295,000
04/22/2015	Back On Market	13127501	A	6638 Lovington Drive	2,524	1981	4	3.0	2/0/2		\$380,000
04/21/2015	New Listing	13135212	A	304 High Brook Drive	2,284	1970	4	2.1	2/0/2	0.20	\$295,000
04/21/2015	Back On Market	13130687	A	829 Westwood Drive	2,082	1961	4	2.0	2/0/2	0.22	\$315,000
04/20/2015	New Listing	13134428	A	6808 Summer Meadow Lane	2,502	1984	4	2.1	2/0/2	0.19	\$339,900
04/20/2015	Price Decrease	13039915	A	2228 W Dutch Drive	2,738	2015	3	2.1	2/0/2		\$468,224
04/20/2015	Price Decrease	13042699	A	1219 Grassmere Drive	2,202	1979	3	2.1	2/0/2	0.21	\$334,000
04/20/2015	New Listing	13069630	A	7231 Crooked Oak Drive	3,062	1974	4	3.1	2/0/2	0.23	\$398,400
04/20/2015	Back On Market	13071078	A	19114 Windmill Lane	2,572	2000	3	2.1	2/0/2	0.25	\$323,000
04/20/2015	Back On Market	13072179	A	6821 Clearhaven Drive	2,625	1977	4	3.0	2/0/0	0.20	\$369,000
04/20/2015	Price Decrease	13072250	A	1210 Emerald Glen Trail	1,827	2006	3	2.1	2/0/2	0.06	\$289,000
04/20/2015	Price Decrease	13075224	A	5826 Buffridge Trail	3,382	1984	4	3.1	2/0/2	0.20	\$450,000

From this screen, a customer can:

Added/Chgd	Chg Type	MLS #
04/22/2015	New Listing	13135063

- Select a listing.

Added/Chgd	Chg Type	MLS #
04/22/2015	New Listing	13135063

- Add a listing to the Favorites list.

Added/Chgd	Chg Type	MLS #
04/22/2015	New Listing	13135063

- Add a listing to the Possibilities list.



<input type="checkbox"/>		Added/Chgd	Chg Type		MLS #
<input type="checkbox"/>	   	04/22/2015	New Listing	 	13135063

- Add a listing to the Discard list. NOTES: If a listing is discarded, it will not appear on the customer's main list of properties.

<input type="checkbox"/>		Added/Chgd	Chg Type		MLS #
<input type="checkbox"/>	   	04/22/2015	New Listing	 	13135063

- Make a note about the property.

<input type="checkbox"/>		Added/Chgd	Chg Type		MLS #
<input type="checkbox"/>	   	04/22/2015	New Listing	 	13135063

- View the property photos.

<input type="checkbox"/>		Added/Chgd	Chg Type		MLS #
<input type="checkbox"/>	   	04/22/2015	New Listing	 	13135063

- View the property on a map.

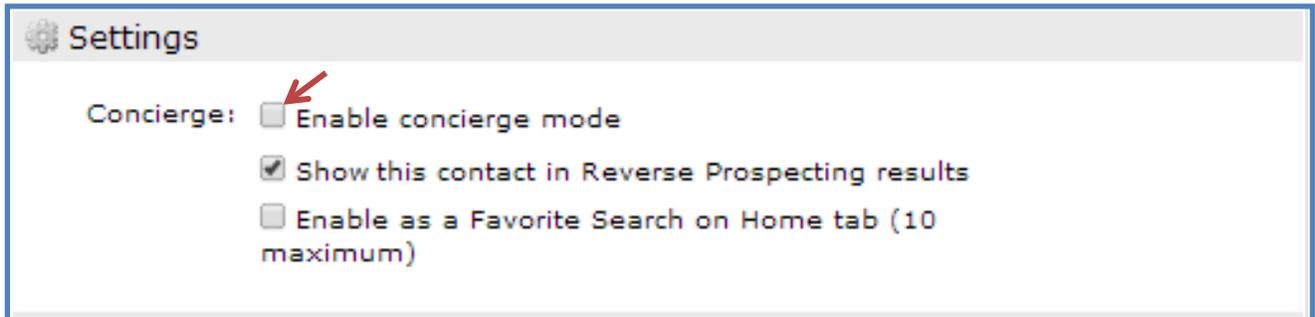
<input type="checkbox"/>		Added/Chgd	Chg Type		MLS #
<input type="checkbox"/>	   	04/22/2015	New Listing	 	13135063

- View the Customer Full Report.



Concierge Mode

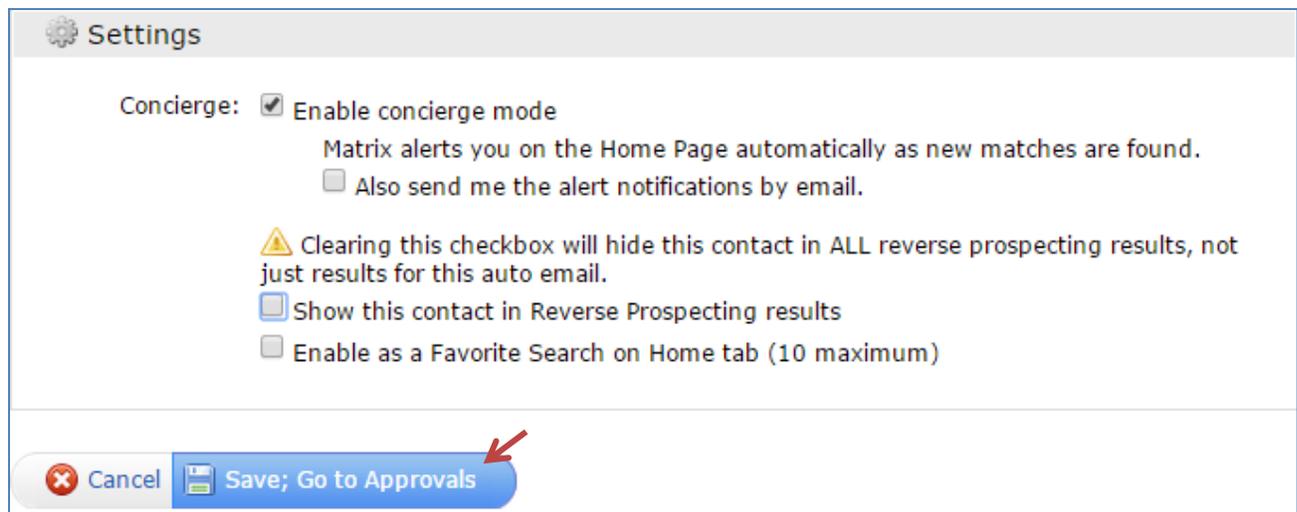
When setting up an Auto Email, Concierge Mode is an option.



The screenshot shows a 'Settings' window with a gear icon in the top left. Under the heading 'Concierge:', there are three options:

- Enable concierge mode (indicated by a red arrow pointing to the checkbox)
- Show this contact in Reverse Prospecting results
- Enable as a Favorite Search on Home tab (10 maximum)

If selected, this sends the listings to the agent for approval before the agent sends them to the client.



The screenshot shows the same 'Settings' window, but with the 'Enable concierge mode' checkbox checked. Below this option, there is additional text:

Matrix alerts you on the Home Page automatically as new matches are found.
 Also send me the alert notifications by email.

⚠️ Clearing this checkbox will hide this contact in ALL reverse prospecting results, not just results for this auto email.

Show this contact in Reverse Prospecting results
 Enable as a Favorite Search on Home tab (10 maximum)

At the bottom of the window, there are two buttons: 'Cancel' (with a red 'X' icon) and 'Save; Go to Approvals' (with a document icon). A red arrow points to the 'Save; Go to Approvals' button.



The selected listings can either be sent to the client or rejected.

Concierge Approvals Page: User Manual (8)

These 8 listings found by 'Large Houses' need your approval. They are not yet visible.

Previous · Next · 1-8 of 8 · Checked 2 · [All](#) · [None](#)

<input type="checkbox"/>	Emailed					ML #	Flag	Status	Area	Address
<input checked="" type="checkbox"/>	Never					13034728		Active	37/7	1404 Fm 3356
<input checked="" type="checkbox"/>	Never					13079825		Active	35/1	5250 Fair
<input type="checkbox"/>	Never					13082736		Active	78/3	715 County Road 164
<input type="checkbox"/>	Never					13088122		Active	36/1	800 VZCR 3425
<input type="checkbox"/>	Never					13114102		Active	1001/718	6548 Lake House Drive
<input type="checkbox"/>	Never					13120833		Active	12/8	1715 Corday Street
<input type="checkbox"/>	Never					13121425		Active	41/3	8601 Del Pino Court
<input type="checkbox"/>	Never					13123914	N	Active	20/1	5609 Wayfarer Drive

Actions Carts

Done Reject Approve Selected

When new listings match the client’s criteria, an alert appears on the upper left side of the agent’s Matrix screen.

ntreis matrix Home Search Stats My Matrix Realist Tax

Concierge Alert! [2 auto emails, 11 listings.](#)



Carts

The carts feature allows agents to attach a listing to a contact's record. The client cannot see the cart, but the agent can choose to email the listings in a contact's cart to a contact.

To place listings in a cart, from a search Results screen, select the Carts menu at the bottom of the screen.

Search run Thursday, 1:57 PM

ML #	Flag	Status	Area	Address	Subdivision Name	Sq Ft Total	Beds	Baths	GAR/CP/TCP
13111190	TX	Active	11/13	5210 Deloache Avenue	Sunnybrook Estates	13,328	7	8/2	7/0/7
12135597	TX	Active	25/15	3712 Alice Circle	Highland Park	7,480	5	4/2	3/0/3
13052246	TX	Active	900/1	18901 Bradshaw Lane	Circle 12 Ranch	8,600	6	6/2	0/2/2
13099712	TX	Active	25/15	3800 Miramar Avenue	Highland Park	9,972	4	4/2	3/0/3
13000786	TX	Active	17/11	2430 Victory Park Lane Unit#3001	Residences	11,807	5	7/3	4/0/4
13091465	TX	Active	25/15	4412 Lakeside Drive	Highland Park 2nd Installment	9,027	5	6/3	3/2/5
12095615	TX	Active	25/15	3800 Beverly Drive	Highland Park 2nd Instl	8,938	4	5/3	4/0/4
13070392	TX	Active	11/12	9800 Rockbrook Drive	Meadowood Estates	10,600	5	5/4	4/0/4
12110911	TX	Active	132/2	1925 N Pearson Lane	Walker Josiah Surv	10,000	9	9/3	5/0/5
13106174	TX	Active	11/13	5505 Chatham Hill Road	Batesons	8,506	5	4/2	9/0/9

Actions Refine Save **Carts** [1] 2 3 · Previous · Next

+ Add to View Cart: My Cross Property (7) New Contact

- Cart: My Cross Property (7)
- Cart: Bach, Barb (12)
- Cart: Bemis, Amy (21)
- Cart: Ferguson, Diane (6)

Property Type is 'Residence'
Status is 'Active'
Current Price is 10000000
Ordered by Current Price, Status, MLS Area, MLS Number
Found 29 results in 0.02 seconds.

Selecting the down arrow next to **Cart: My Cross Property (#)** displays a list of contacts.

Actions Refine Save **Carts**

+ Add to View Cart: My Cross Property (7) New Contact

- Cart: My Cross Property (7)
- Cart: Bach, Barb (12)
- Cart: Bemis, Amy (21)
- Cart: Ferguson, Diane (6)

Property Type is 'Residence'
Status is 'Active'
Current Price is 10000000
Ordered by Current Price, Status, MLS Area, MLS Number
Found 29 results in 0.02 seconds.



Selecting **+ Add to** will add the checked listings to the selected contact's cart.

TX 13106174 Active 11/13 5505 Chatham Hill Road

Actions Refine Save **Carts**

+ Add to
View
Cart: Bach, Barb (12)
New Contact

Property Type is 'Residential'
 Status is 'Active'
 Current Price is 10000000+
 Ordered by Current Price, Status, MLS Area, MLS Number
 Found 29 results in 0.03 seconds.

The listings in the cart can be viewed either from the **My Carts** widget from the **Matrix Homescreen**

My Carts

Cart: My Cross Property (7)
Cart: Bach, Barb (12)
 Cart: Bemis, Amy (21)

or from the My Matrix / Contacts tabs.

ntreis matrix Home Search Stats **My Matrix** Realist Tax Links Finance Input Market Reports Admin Help

Summary
 Contacts
 My Listings
 My Information
 Saved Searches
 Auto Emails
 Sent Email
 CMAs
 Settings
 Portal Greeting

Active Contacts (3)

Name	Email
Bach Barb	barb@thanr.com
Bemis Amy	amy@bemis.com
Ferguson Diane	diane@ferguson.com

Search: Filter Contacts: ... choose a filter

My Last Use	Last Portal Visit	12	1*	7	5	3	Ref#
0 3 yesterday	02/13/2015	12	1*	7	5	3	99539
0 0 04/03/2015	02/17/2015	21	4*	14	0	17	46144
0 0 Monday	Monday	6	2	9	4	0	41660

Show 3 Active Show All 3 Show 0 Inactive Import Export All



Hit Counter

The Hit Counter displays statistics about the exposure of a listing. It can be found under the **My Matrix** tab / **My Listings**. The **Show** down arrow brings up the option of **My Hit Counters**.

Address	City	Beds	Baths	Sqft	Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
...ams Drive	Dallas	3	2/1	2,134	123	144	7	4	112	97	9	3

The statistics on the right of the screen detail the views of the listing from Matrix.

Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
123	144	7	4	112	97	9	3

Client Portals is the number of clients to whom the listing has been emailed (either directly or via an auto email).

Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
123	144	7	4	112	97	9	3

Client Views is the number of times the emailed clients viewed the listing details.

Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
123	144	7	4	112	97	9	3



Client Favorites is the number of times a client designated the listing as a favorite.

Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
123	144	7	4	112	97	9	3

Client Possibilities is the number of times a client designated the listing as a possibility.

Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
123	144	7	4	112	97	9	3

Auto Emails is the number of clients to whom the listing has been sent via an auto email.

Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
123	144	7	4	112	97	9	3

Prev 14 Day Views is the number of times the listing has been viewed via a portal in the past 14 days.

Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
123	144	7	4	112	97	9	3

Agent Published is the number of times an agent approved sending this listing to their client (via concierge mode).

Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
123	144	7	4	112	97	9	3

Agent Rejected is the number of times an agent rejected sending this listing to their client (via concierge mode).

Client Portals	Client Views	Client Favorites	Client Possibilities	Auto Emails	Prev 14 Day Views	Agent Published	Agent Rejected
123	144	7	4	112	97	9	3



Reverse Prospecting

The Reverse Prospect system displays agents who have opted in to showing their contact information to the listings agents whose listing they have sent to their clients. It can be found under the **My Matrix** tab / **My Listings**. The **Show** down arrow brings up the option of **My Hit Counters**. Once there, a listing must be checked and the **Reverse Prospect** selected.

This screen displays agents who have emailed this listing to a client from Matrix.

Reverse Prospect Results for 11614666

These agents each have a contact who has received this listing. Click the agent name to email them about your listing. They can identify the contact via the Reference # by looking it up on their Contacts page. Count is the total number of listings each contact has been sent.

2232 Addams DR Dallas
 MLS#: **11614666**
 Area: **101/7**
 Subdv: **VILLA PLAZA**
 County: **Denton**
 Category: **Residential**
 Type: **RES-Single Family**
 Parcel ID: **12345678**

Status: **Active**
 Bedrooms: **3**
 Full Baths: **3**
 Half Baths: **0**
 SqFt: **3,209 / Appraiser**
 Lake Name:
 Plan Dvlpmnt:

LP: **\$399,900**
 Lst \$ / SqFt: **\$124.62**
 Acres: **0.179**
 Yr Built: **2005 / Preowned**

Agent	Ref #	Pre-approved?	Count	Date Sent	Email	Office Name	Phone
Bob Smith	75241		22	04/12/2015	Bob_Smith@gmail.com	Bob Smith Realty	(555) 555-5555
Jane Jones	96898		30	04/15/2015	Jane_Jones@yahoo.com	Jane Jones Real Estate	(555) 555-4001
Deb Case	08137		82	03/27/2015	Deb_Case@gmail.com	Deb Case Realty	(555) 555-2447
Bob Reynolds	06343		132	04/08/2015	Bob_Reynolds@yahoo.com	Bob Reynolds Real Estate	(555) 555-0893
Jane Nguyen	68799		45	03/19/2015	Jane_Nguyen@gmail.com	Jane Nguyen Realty	(555) 554-9339
Deb Williams	29096		106	04/16/2015	Deb_Williams@yahoo.com	Deb Williams Real Estate	(555) 554-7785
Bob Ramos	52376		115	03/20/2015	Bob_Ramos@gmail.com	Bob Ramos Realty	(555) 554-6231
Jane Thomas	26465		185	04/08/2015	Jane_Thomas@yahoo.com	Jane Thomas Real Estate	(555) 554-4677
Deb Adams	95613		204	03/29/2015	Deb_Adams@gmail.com	Deb Adams Realty	(555) 554-3123
Bob Jefferson	32701		1	03/19/2015	Bob_Jefferson@yahoo.com	Bob Jefferson Realty	(555) 554-1569
Jane Reynolds	47507		1	Tuesday	Jane_Reynolds@gmail.com	Jane Reynolds Real Estate	(555) 554-1569

[Return to My Listings](#)



NOTE: This is not all of the agents who have emailed this listing; only agents who have opted in to Reverse Prospecting will be displayed.

The **Agent** is the agent who emailed the listing. Selecting the agent's name opens a dialog box to email the agent.

Agent	Ref #	Pre-approved?	✉ Count	Date Sent	📁 Email
<u>Bob Smith</u>	75241		22	04/12/2015	❤️ Bob_Smith@gmail.com

The **Ref #** is an internal number the system uses to track the client.

Agent	Ref #	Pre-approved?	✉ Count	Date Sent	📁 Email
<u>Bob Smith</u>	75241		22	04/12/2015	❤️ Bob_Smith@gmail.com

Pre-Approved will indicate if the agent selected the Pre-Approved option with the client was entered.

Agent	Ref #	Pre-approved?	✉ Count	Date Sent	📁 Email
<u>Bob Smith</u>	75241	✓	22	04/12/2015	❤️ Bob_Smith@gmail.com

An envelope in the **Contacted** field indicates the agent has been emailed from Matrix.

Agent	Ref #	Pre-approved?	✉ Count	Date Sent	📁 Email
<u>Bob Smith</u>	75241		✉ 22	04/12/2015	❤️ Bob_Smith@gmail.com

The **Count** is the number of listings sent to this client in this search or direct email.

Agent	Ref #	Pre-approved?	✉ Count	Date Sent	📁 Email
<u>Bob Smith</u>	75241		22	04/12/2015	❤️ Bob_Smith@gmail.com

The **Date Sent** is the date the agent emailed the client the listing.

Agent	Ref #	Pre-approved?	✉ Count	Date Sent	📁 Email
<u>Bob Smith</u>	75241		22	04/12/2015	❤️ Bob_Smith@gmail.com

The **Prospect Interest Indicator** shows if the customer designated the listing a favorite or a possibility.

Agent	Ref #	Pre-approved?	✉ Count	Date Sent	📁 Email
<u>Bob Smith</u>	75241		22	04/12/2015	❤️ Bob_Smith@gmail.com



Personalization - My Matrix

From the Home Screen, **My Matrix** can be accessed from the top Menu Bar.

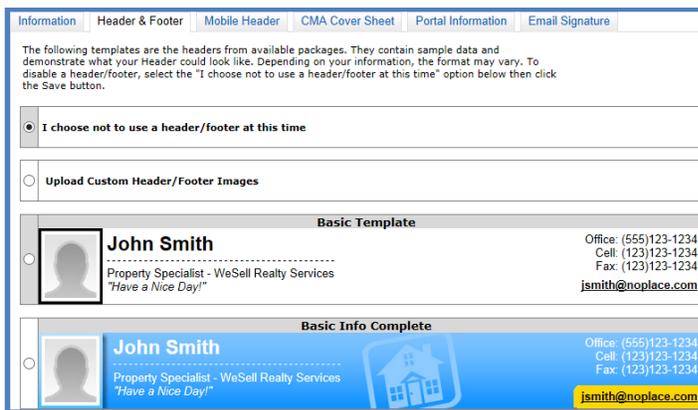


Under the **My Matrix** menu, **My Information** loads another menu.



Header & Footer

Under **Header & Footer**, the user can either use system-generated headers:



The following templates are the headers from available packages. They contain sample data and demonstrate what your Header could look like. Depending on your information, the format may vary. To disable a header/footer, select the "I choose not to use a header/footer at this time" option below then click the Save button.

- I choose not to use a header/footer at this time
- Upload Custom Header/Footer Images

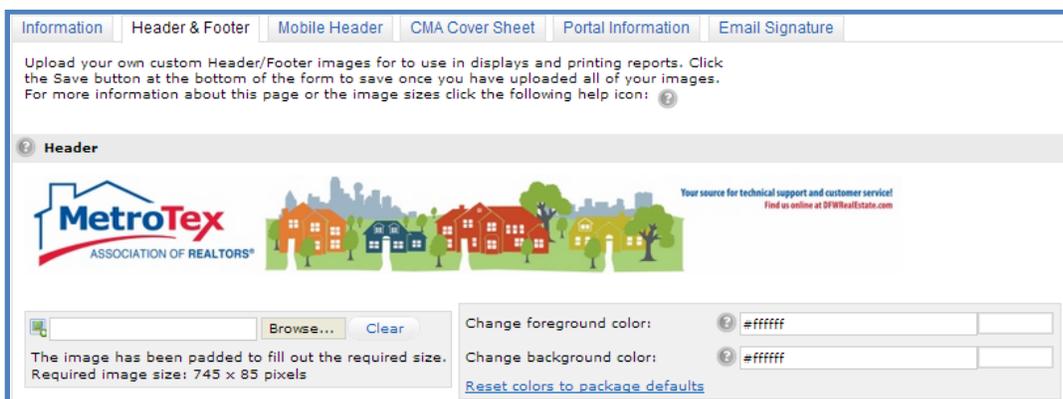
Basic Template

 **John Smith**
Property Specialist - WeSell Realty Services
"Have a Nice Day!"
Office: (555)123-1234
Cell: (123)123-1234
Fax: (123)123-1234
jsmith@noplace.com

Basic Info Complete

 **John Smith**
Property Specialist - WeSell Realty Services
"Have a Nice Day!"
Office: (555)123-1234
Cell: (123)123-1234
Fax: (123)123-1234
jsmith@noplace.com

Or upload custom headers:



Upload your own custom Header/Footer images for to use in displays and printing reports. Click the Save button at the bottom of the form to save once you have uploaded all of your images. For more information about this page or the image sizes click the following help icon: ?

Header

  Your source for technical support and customer service!
Find us online at DFWRealEstate.com

The image has been padded to fill out the required size.
Required image size: 745 x 85 pixels

Change foreground color:

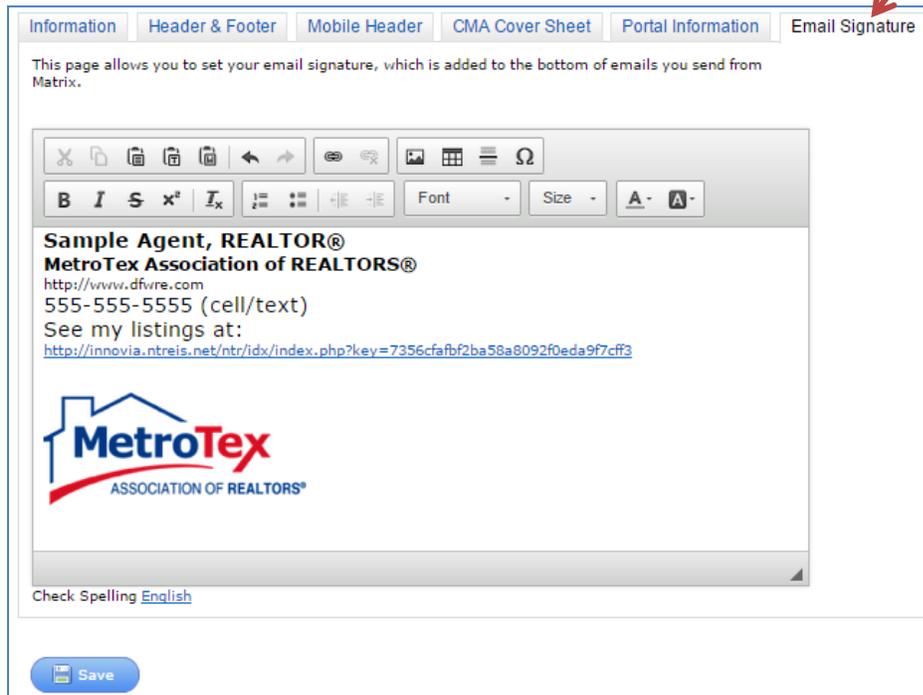
Change background color:

[Reset colors to package defaults](#)

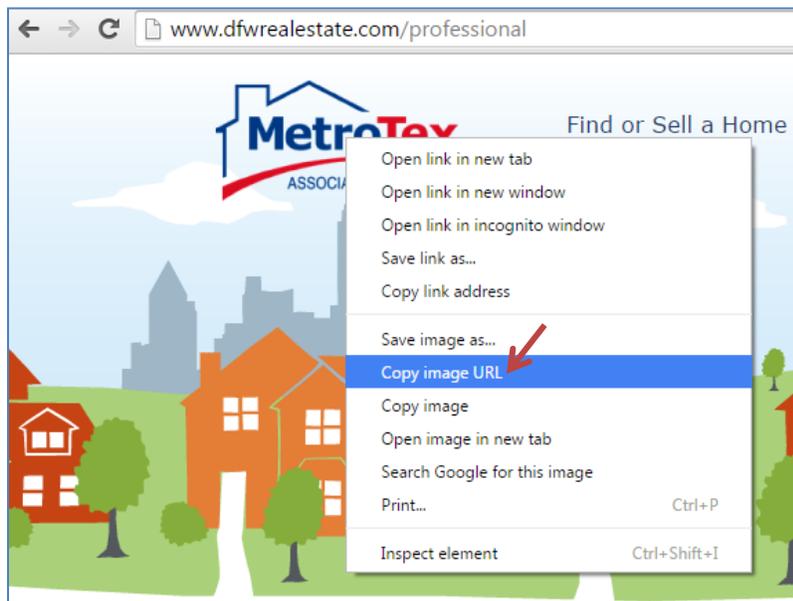


Email signature

The email signature can also be created under then **My Matrix** menu, then **My Information**.



The email signature can include different fonts, text colors and sizes as well as photos and logos. Any photo or logo to be included must exist on a website. When the URL is copied:

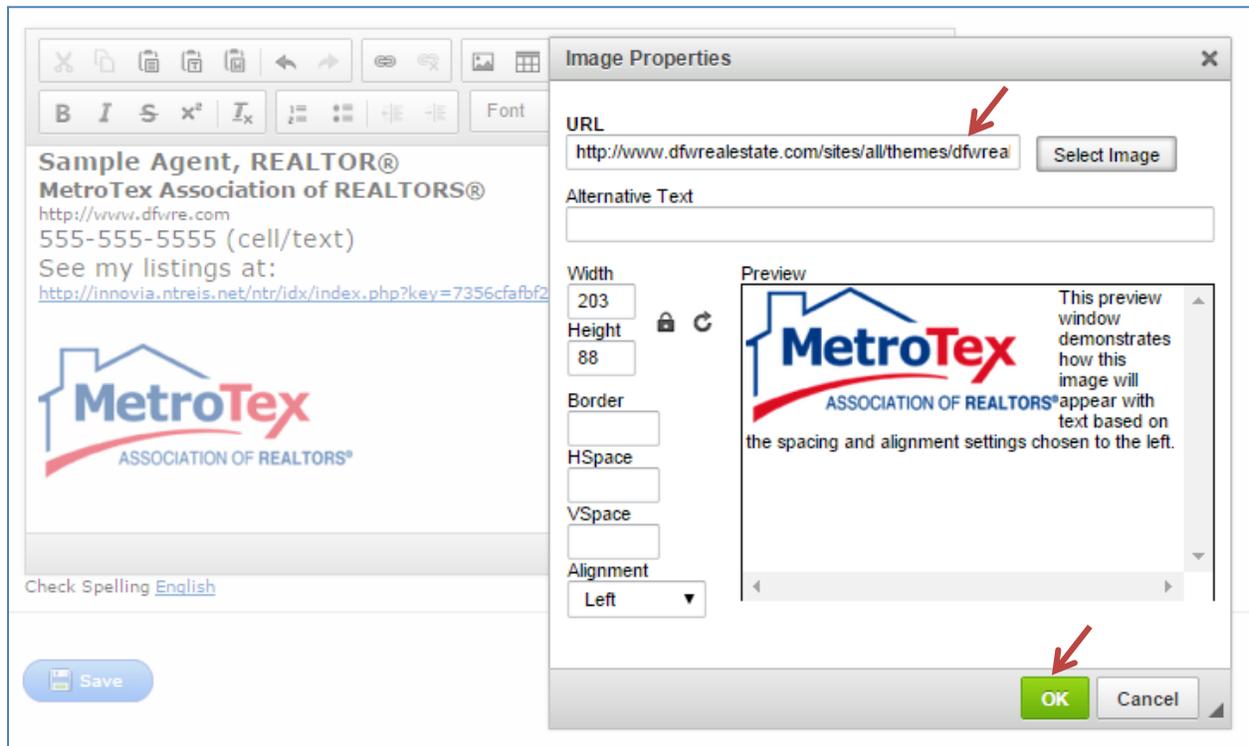




It can be pasted in the photo dialog box.



Pasting the URL in the photo dialog box and selecting OK will add the image to the email signature.

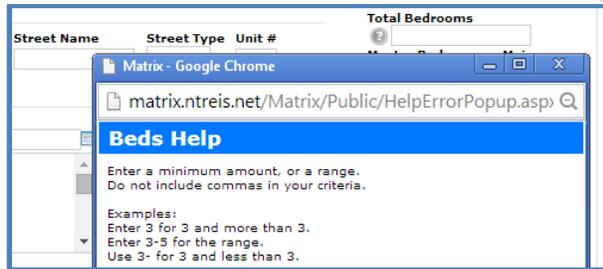




Additional Resources

Matrix Help

Throughout the system, the question mark icon  indicates available help screens.



MetroTex Online Support

Find a wealth of information at the MetroTex Matrix Support page.

www.MyMetroTex.com/mls-support

The site includes:

- The NTREIS Matrix User Manual**
 - Download the latest version of the User Manual anytime.
- Video Instruction**
 - Designed to be brief and informative for busy agents, these training videos include concise overviews of different parts of the system and MetroTex Matrix Minute clips for one-minute explanations of frequently used functions.
- MLS Product Support**
 - Find information about all the products MetroTex supports including user manuals, tutorials and helpdesk contact information.

NTREIS After-Hours Support

Answerlink (Matrix) National Helpdesk: 888-440-3687

Monday - Friday | 7:00 AM - 12:00 AM

Saturday - Sunday | 10:00 AM - 10:00 PM