This course will give new MLS customers a general tour of the Matrix platform. Learn about navigating and functioning through the Matrix MLS Database. From set up to searching, Matrix is your primary MLS tool. You will learn the basics of how to use the Matrix MLS System to power your real estate business.

Learning Objectives

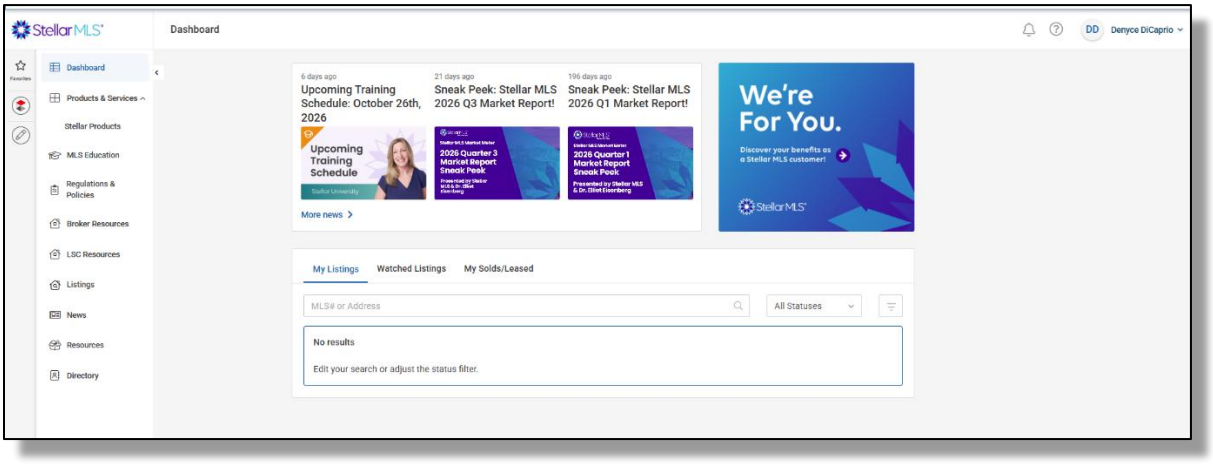
1. **Create and manage contacts and property searches in Matrix** by entering customer information, selecting appropriate property criteria, using geographic and map-based search tools, and reviewing matching listing results.
2. **Manage and distribute MLS search results** by reviewing listing information, emailing or printing selected properties, saving searches, and creating Auto Emails to provide customers with current listings that match their criteria.
3. **Use Matrix and OneHome™ tools to support ongoing customer engagement and activity monitoring** by tracking customer portal activity, configuring notifications, and using dashboard tools such as Timeline, Favorite Searches, and Recent OneHome Visitors.

Table of Contents

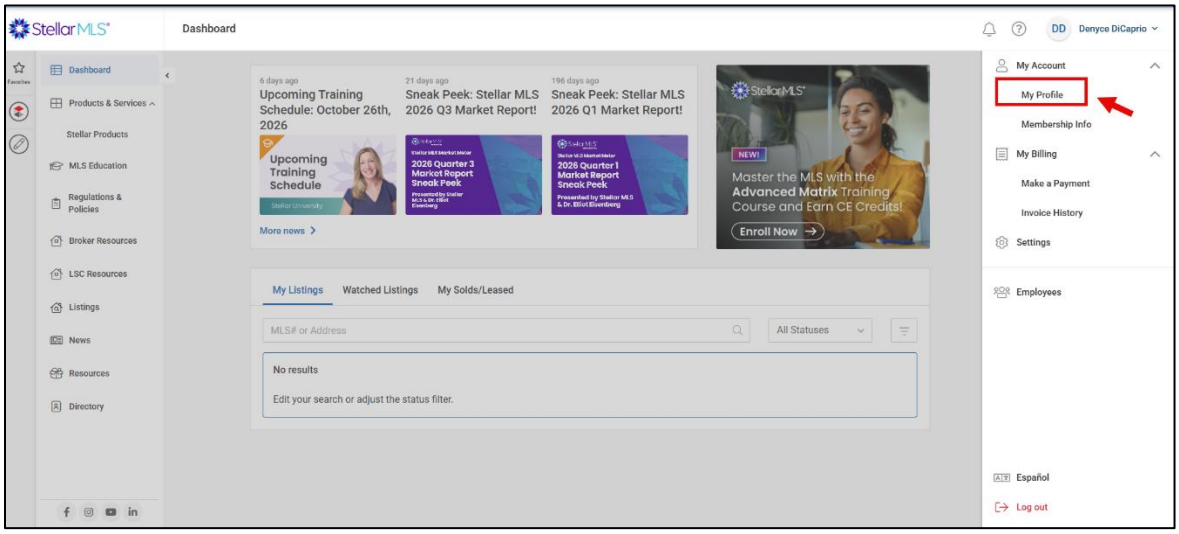
LOG IN & ACCESS **1**
MATRIX **4**
CONTACTS IN MATRIX 4
BASIC SEARCHING 5
MAP BASED SEARCHES 10
RESULTS GRID, LISTINGS & ACTIONS 11
ONEHOME CUSTOMER PORTAL **16**
MATRIX NOTIFICATION TIMELINE & DASHBOARD WIDGETS **19**
MATRIX NOTIFICATION TIMELINE 19
DASHBOARD WIDGETS 19

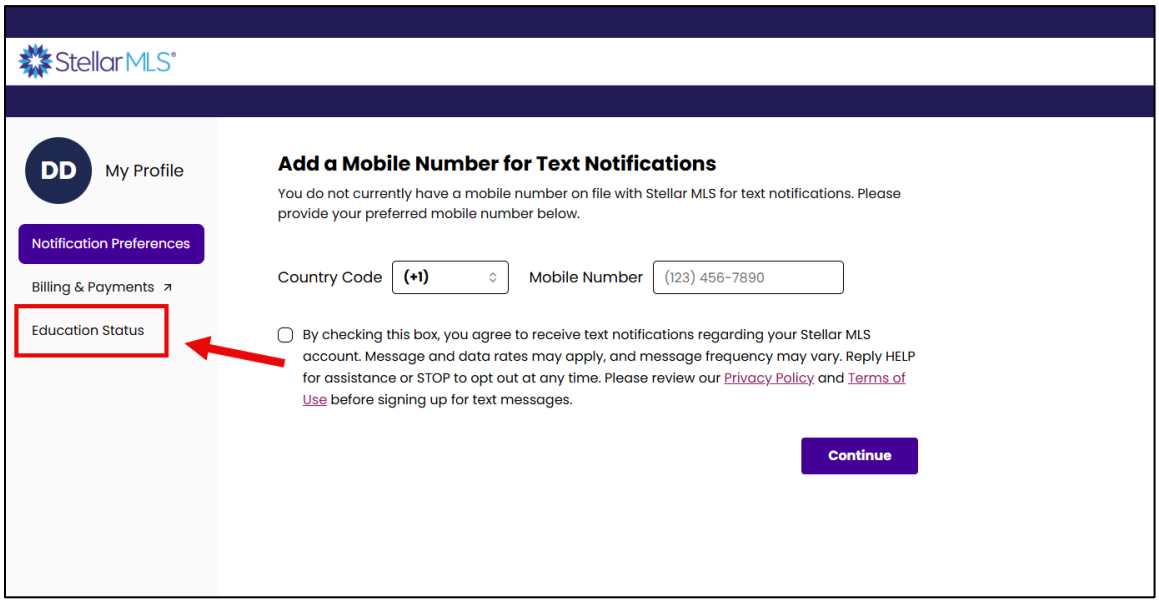
Log in & Access

Log in to the MLS at 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 then open your ***Stellar Central Workspace.*** A navigation menu is available on the left side or via a three-line menu in the upper right corner of your screen if using a zoomed display or a mobile device.

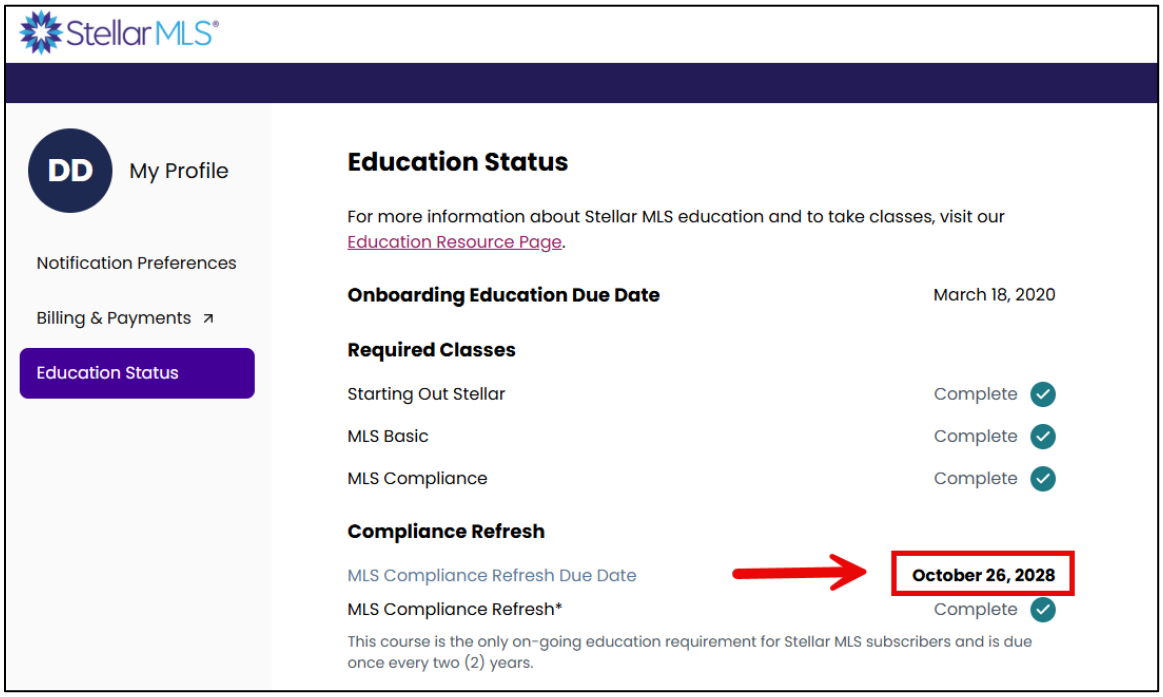


To check your required MLS education, click your name in the top right corner of Stellar Central and select My Account, then My Profile. Under Notification Preferences, you can add your cell phone number to receive text message reminders of your education due dates (sent 60, 30, 15, and 2 days before each due date).





Select Education Status at the bottom of the left menu to confirm which required courses you have completed, including the initial onboarding courses and Compliance Refresh (due every 2 years). If a course you have taken still shows as incomplete after a couple of days, contact Stellar MLS.



Matrix

Contacts In Matrix

From the My Matrix menu, select Contacts.

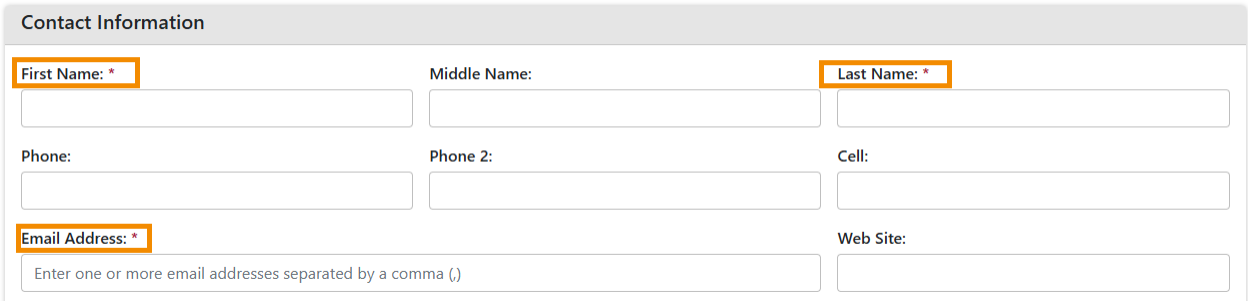
Contacts Page –Add new contacts individually or import using a CSV file, review your contacts in either Gallery or List views, and quickly access email, category, automated emails, saved searches, the date the contact visited their OneHome™ portal and actions taken on listings (described later in this course), as well as carts, your agent picks, and more.

1. Add – Click on the “Add” button, located near the top right of the page. If you want to import a contact list from a CSV file, use the Import button to the right and follow the instructions provided.



2. When adding a contact record, three (3) fields will be highlighted. This means that a minimum of 3 fields of customer information is required to add a new contact. These include First Name, Last Name, and Email.

   Optional fields include address, business information, private notes (visible only to you), a category (Buyer, Seller, Friend, Prospect, or a custom category you create with the + sign), a Mortgage Pre-Approved toggle, and Enable Reverse Prospecting. Tip: add yourself as your first contact using a personal email address (not the one on file with Stellar MLS or your association) so you can send yourself a test auto email and see exactly what your customers will receive.



3. Edit Contact Information -From the main contact page, click on the contact's name. This will open the page with your contact details. Click on the edit icon located to the right of the top of

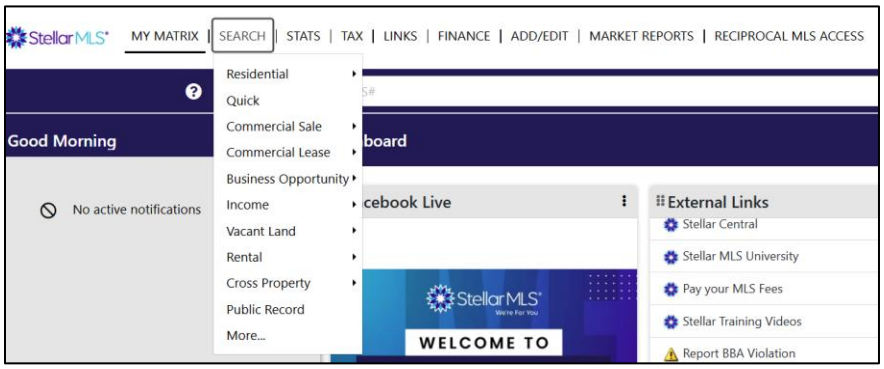
the page. This takes you to the contact page where you can add or edit your contact's information.

4. Send Opt-in Request – This option is to send a request for consent to contacts for text message notifications to the email addresses saved in the contact. This can be done in the contact record or when sending property emails in Matrix.

Basic Searching

Under the Search tab in Matrix, various searches can be run. Click “More…” to see all available search types such as:

- Residential
- Commercial Sale
- Commercial Lease
- Business Opportunity
- Income (duplexes, triplexes, quadraplexes)
- Vacant Land
- Rental
- Cross Property
- Agent
- Office
- Open House
- History
- Public Record



For each property search form, there is a Quick and Detail version. The Detail version has additional fields shown by default, such as garage/parking features, water fields, and green energy fields but both forms return matching results at the same speed.

Status Field

Under the status field, Active is checked as a default. If you select any status that is not Active, the default date range is 0-180 (this pulls listings placed in that status in the past 180 days). This can be changed by typing a new range or using the calendar icon. Tip: when searching for buyers, consider checking Coming Soon in addition to Active.



For example, 0-365 pulls listings placed in that status a full year back while 0-30 is for thirty (30) days back. As an alternative, you can also enter a specific range of dates such as 9/1/2026-9/30/2026.

Property Style Field

Select the property style you are searching for here. Under the Residential search form, options include: Single Family Residence, Condo, Townhouse, Mobile Home, etc.
For any picklist field (Property Style, Property Description, Special Sales Provision, etc.), to select more than one option, select your first option and then hold the control key down when you select the second option (command key for Mac).



Use the “And”, “Or”, or “Not” radio buttons to indicate if you want all of the options to be true [◉ And], any 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

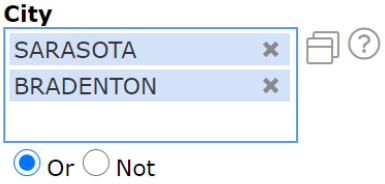
In the center of the search forms, you can search by a variety of geographic fields, including address, county, zip code, city, or subdivision.

County: Select the county where you are searching for listings from the picklist or type its name into the field. To select more than one county from the list, hold down the control key (or command key in a Mac) or you can separate multiple typed entries with commas. Additionally, you may click the search icon to search for and add counties by name (select the county, click Add, and then click OK to save your selection).

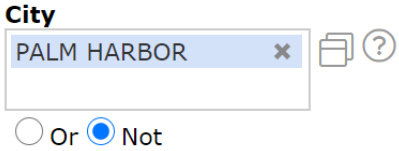
MLS Zip: Either type in the zip code(s) or click the search icon to search for zip codes by city or by neighborhood name. To enter more than one zip code, put commas in between them. You may also add a range of zip codes using a dash between the lowest and highest number. If you would like to exclude a zip code from your search, select the Not button underneath the zip code field.

City: Enter the city or cities where you are searching for properties and each will be displayed in the list. To remove a city, from the list, click the X to the right of its name. To exclude a city from your search, select the Not button.

Searching for Multiple Cities:



Excluding a 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 wildcard search and will pull any listings meeting your other criteria that contain that subdivision name. For example, if you enter *Palmer Ranch*, that will pull listings in Arielle at Palmer Ranch, Mira Lago at Palmer Ranch, etc.



Asterisk (*): a wildcard that can be used anywhere in the text

Public Remarks *pool* search field for anything **containing** the word, "pool" (what's before or after is irrelevant).

Public Remarks reduced* search field for anything **starting with**, "reduced" (what's after is irrelevant).

Public Remarks *deal. search field for anything **ending with**, "deal." (what's before is irrelevant).

Public Remarks reduced*deal. search field for anything **starting with**, "reduced" and **ending with**, "deal." (what's between is irrelevant).

Exclamation (!): used for exclusion

Public Remarks !*pool* search field for anything **not containing** the word, "pool" (any other words are acceptable).

Public Remarks !reduced* search field for anything **not starting with**, "reduced" (starting with any other words is acceptable).

Public Remarks !*deal. search field for anything **not ending with**, "deal." (ending with any other words is acceptable).

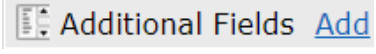
Question Mark (?): character substitute

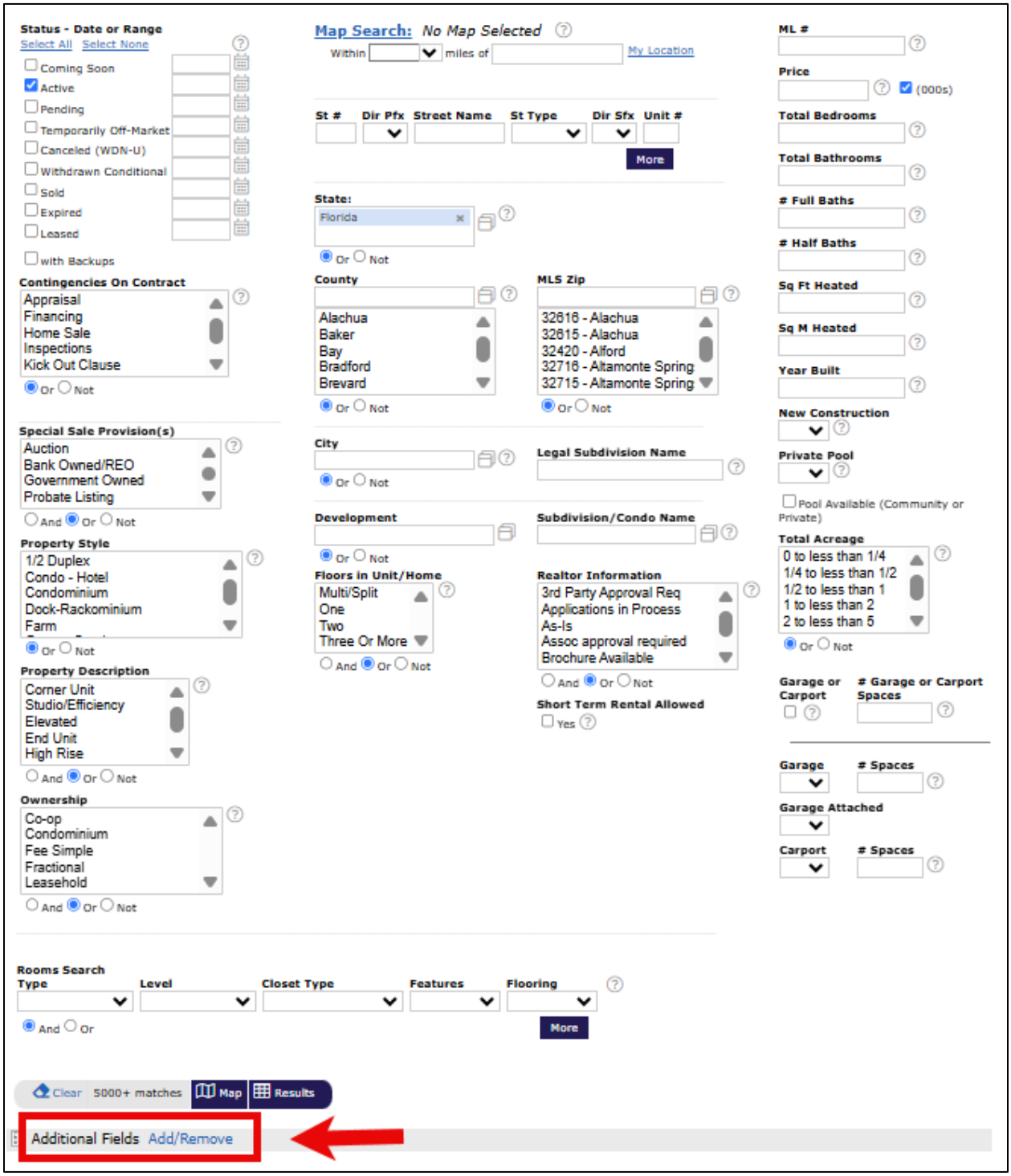
Public Remarks *gre?t* search field for anything **containing** a word with the letters, "gre?t" (where, "?" can be any letter).

Comma (,): used to combine

Public Remarks *pool*, !*pool ta search terms search field for anything **containing** the word, "pool" but **not containing** the word, "pool table".

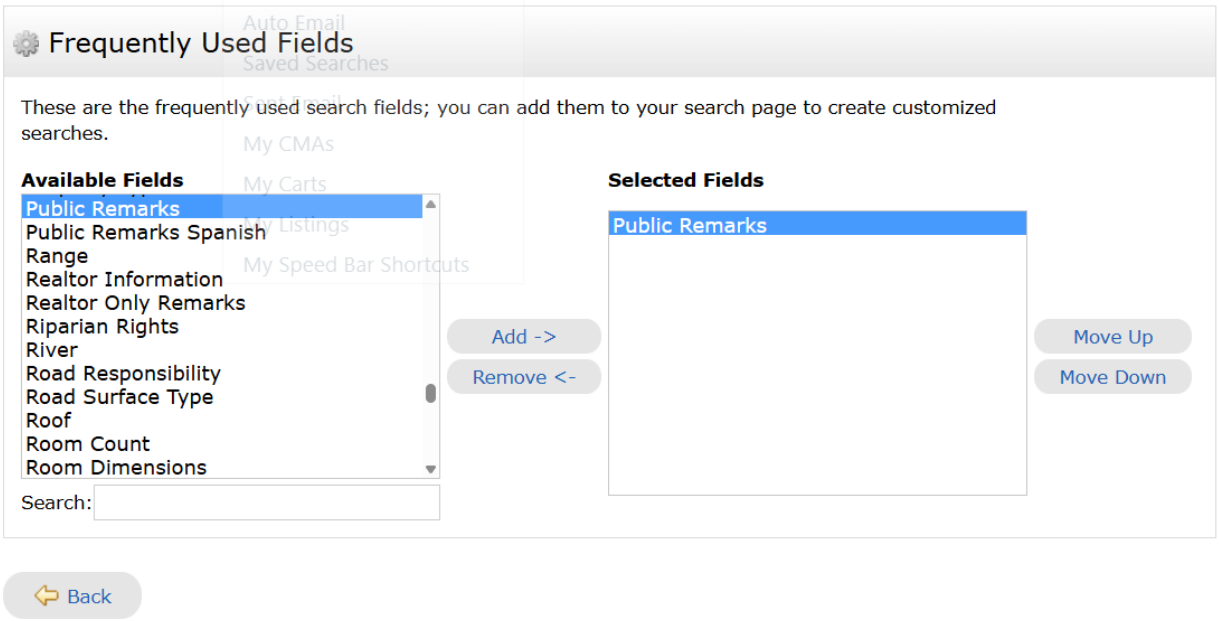
Adding Additional Fields
On the bottom of each search form, there is an option to add additional fields.





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 select fields directly from the list or use the search bar to search for a field by name. If you are unable to find the criteria that you are looking for, you can access the Residential Listing Form and use the CTRL+F key to search the form for the criteria that you are searching for. This will help you to identify what category the criteria you are looking for can be found under. Once selected, click the "add" button and then click "back" to return to the search form and enter your criteria.

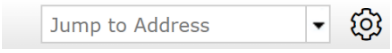


NOTE: Be sure to join the Stellar MLS Training Team for additional classes to learn more about effectively leveraging the more advanced features of Matrix such as wildcards and customizing the search forms!

Recent Searches: If you accidentally leave a search before saving it, click the Recent Searches button. Matrix keeps your searches from the past 7 days, including any shapes drawn on the map, so you can pick up where you left off. Do not rely on this to save your work long term; save the search or set up an auto email instead.

Map Based Searches

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.



 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.

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

Note: When you click the red dot associated with a shape, you have the option to include or exclude that shape from your map or the intersection of two or more shapes if they overlap.

 Clear Map Shapes – Erases all of the shapes drawn on the map.

 Map Layers – Allows you to overlay a variety of different information to the map without changing your original search criteria.

 Recenter Map – Recenters the map view and zoom level to show all properties matching your search.

 Layer as Shape- This tool allows you select desired layer and creates the layer as a shape on the map.

Results Grid, Listings & Actions

Once all of your search criteria is entered, click the "Results" button on the bottom of your search form or the tab along the top. This will pull up your results grid. Results can be sorted by a particular column by clicking on that column's 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.



On top of the 360 Property View report, there are several additional buttons just below the Listing tab. Some of these are the same buttons you see on the results grid, but there are a few additional tools here as well. These include:



= Listing Photos

= View Listing Map View

= Open House Info

= RatePlug

= Down Payment Resource

=MLS History for this property

= Attachments

= ShowingTime

= Realist Tax Info

=iMAPP tax info

=Data Coop

= Market Conditions Info

=SkySlope Form

=Form Simplicity

=Transaction Desk

=Smart Charts

=Realtor.com Info

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 an MLS ID, you can enter the listing. The default display is the 360 Property View which integrates both listing and public records data, but this can be changed under the "Display" pulldown menu. There are various customer displays and flyer displays available.

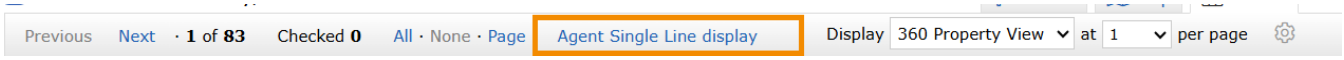
The 360 Property View is divided into the following parts:

Listing Tab

- Summary Section – Photos, County, Subdivision, Status, Price, Bedrooms, Bathrooms, Active 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.
- Green Features – Disaster mitigation, Green Water Features, etc.
- Community Information – HOA/Condo Fees, Pet Restrictions, Lease Restrictions, Community Amenities
- Realtor Information – Listing Agent/Office, occupancy type, Showing Instructions, Driving Directions, Realtor Remarks
- Seller's Preferred Closing Agent – Preferred title and closing agent contact information

Other tabs include: Tax (basic public records info), Photos (MLS photos), History (both sales history and MLS listing history), Parcel Map (including a "walk the block" feature to click on neighboring properties for information), a Flood Map, and if applicable, a Foreclosure tab.

To return to the results grid from the 360 Property View, click on the link that reads, "Agent Single Line display" or use the Display pulldown menu. Avoid using your browser's back button, which can log you out of Matrix.



Working with Search Results

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

Actions Menu



The Actions menu features functions such as emailing, printing, running driving directions, launching a CMA wizard, running statistics, exporting the data, 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.

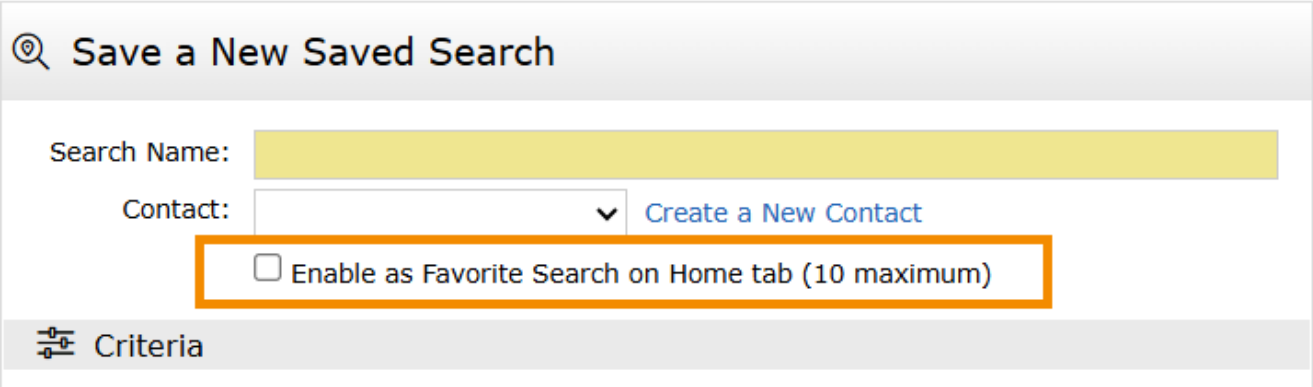
- Print: Print selected listings. You can choose a variety of displays to print and select whether or not to include a header and footer. Listings can be printed to paper, PDF, or emailed as a PDF attachment from this button. When printing for a customer, choose a display with "Customer" in its name so the listing agent's information is not included.
- 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 in .csv format (comma-separated values) to open in another software program such as 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.
- ShowingCart: Launch multiple listings into ShowingTime to request showings.
- Custom PDF Reports: Create a custom PDF report.

Save Menu



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

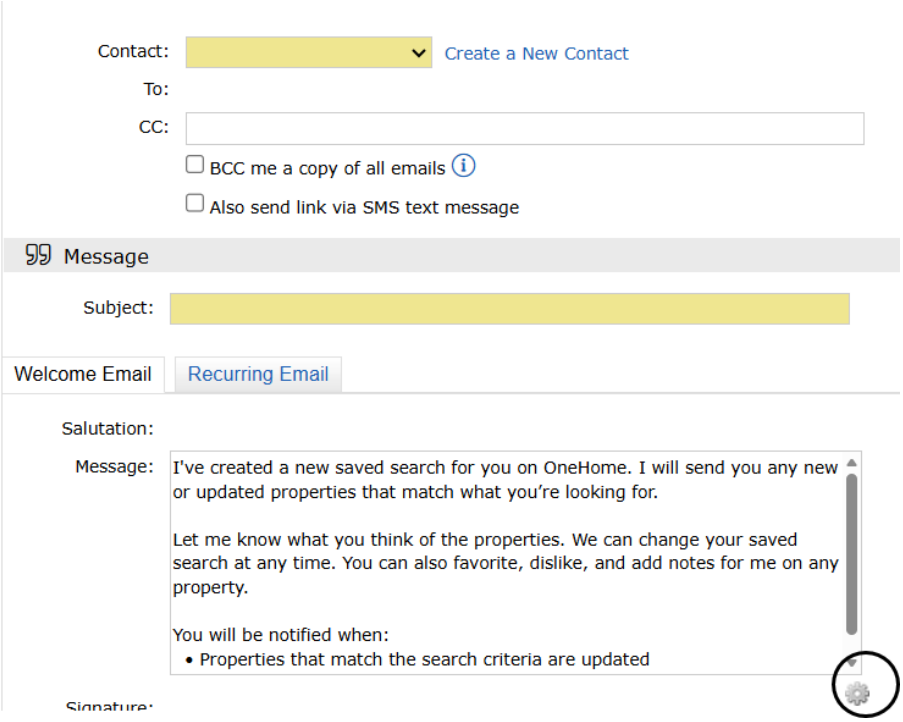
- New Saved Search: Save the criteria of this search to run in the future. Note that when the saved search is run later, the most up-to-date results matching that criteria would be pulled. There is a check box to enable the search as a favorite on the Home tab if you want this search to appear on your 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. You also have the option to send a link via SMS text message by checking the box. Enter a subject for the email. The Welcome and Recurring messages are filled in with default text, which you can edit directly in the text box. The welcome text goes out with the first email, and the recurring text goes out with each update after that. To make your edited text the new default, click the gear icon in the bottom corner of the text box.

Choose a subject your customer will recognize and that is specific enough for you to tell your auto emails apart later (for example, "Tampa Pool Homes – Smith" rather than "Tampa Homes"). You can also set the email language to English or Spanish; Spanish translates the default messages and the customer's OneHome™ portal, but not any custom text you type.

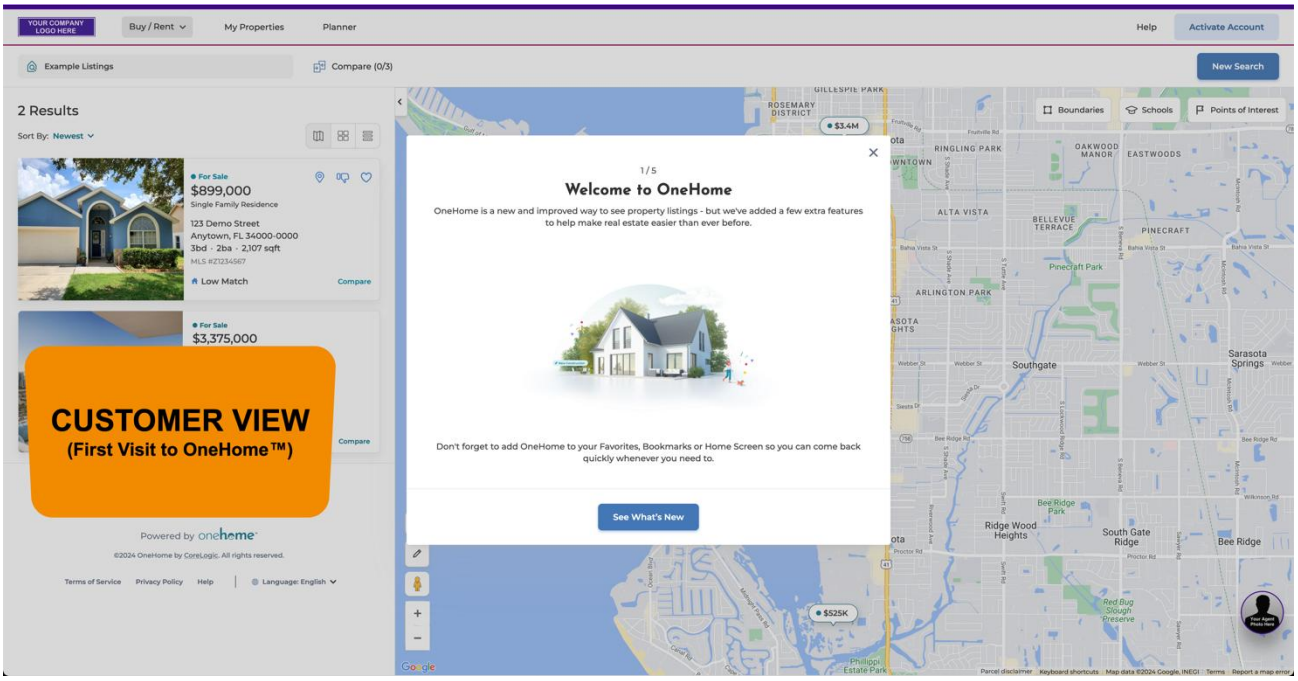


Under the Settings section of the auto email wizard, if you select "Enable Concierge Mode", any listings will be sent to you first for approval. If this is not selected, the Schedule section will appear where you can select if you want emails to go out ASAP (as soon as a matching listing hits the market), Daily (on the days you choose), or Monthly (on the first of the month). After you click Save, the first email can take a couple of hours to arrive.

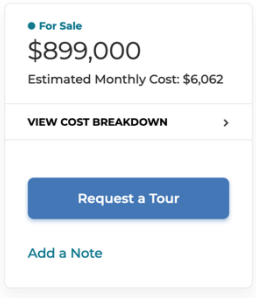
The Auto Email wizard also has a display option to Enable as a Favorite Search on the Matrix Home Tab (if you want the search behind this email to appear on your home page Favorite Searches widget).

OneHome Customer Portal

When you email property listings from Matrix, your customer is sent a link to their customer portal site, OneHome™. The portal is automatically generated when you send an email from Matrix and is how your customers will view and interact with the listings you send – and it's all branded to you! [Personalizing / Branding is covered in the course *Starting Out Stellar*]



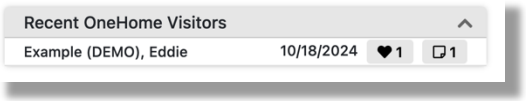
When first visiting the portal, your customers will be greeted with information all about OneHome™ and can activate an account that provides them access to additional features of the site. Although they can view all the listing data that you send from Matrix immediately, after activating an account (which is quick and easy) your customers and prospects can take advantage of many enhanced features including but not limited to:



- Marking a property as a favorite or indicating that it may not be for them
- Adding a Note on a specific property that you can read and respond to in Matrix
- Request a Tour (which sends you a note with your customer's availability so you can then follow up)
- Save their own property searches

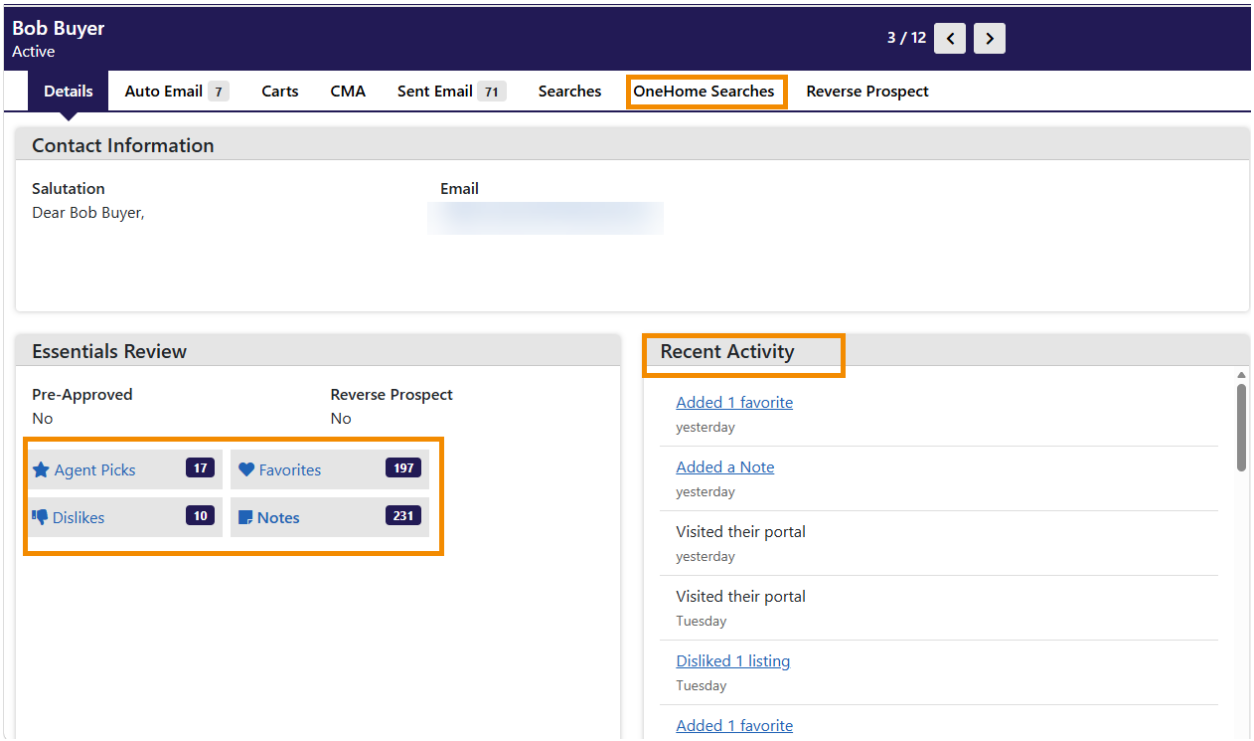
- Access the Planner and PropertyFit™
- Compare other properties matching search criteria
- Access their account from any device at OneHome.com

Planner: Your customers can track the buying or selling process from start to finish, and you can track their process along the way.
PropertyFit: After answering a few simple questions, your customers will see how closely each listing matches what they're looking for at a glance. Plus, you get to see how their preferences change over time.

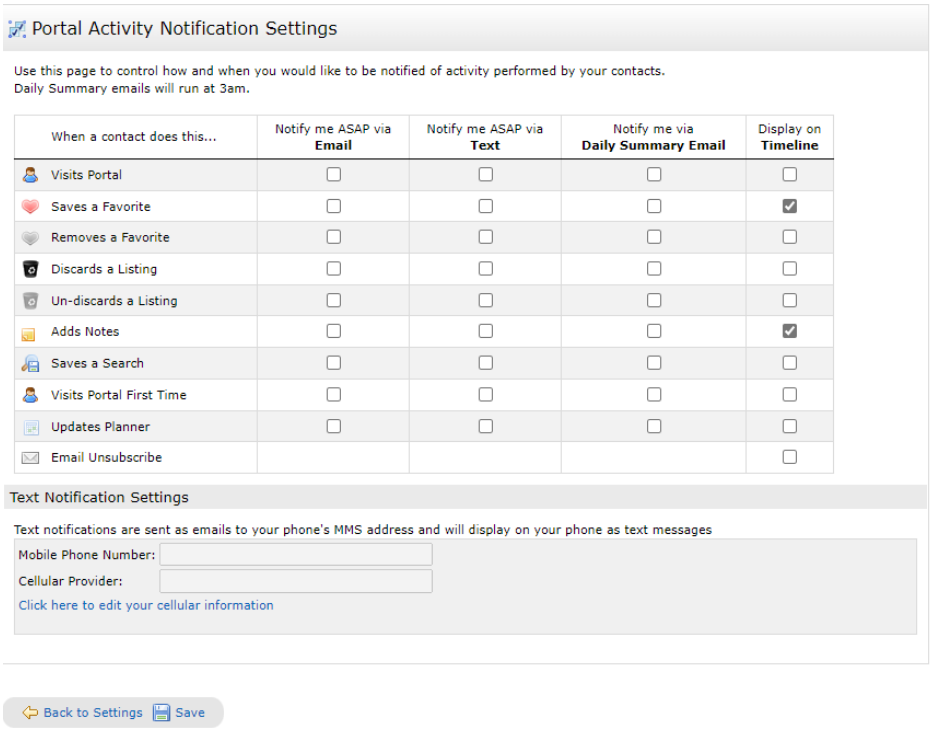


Also, under the Recent OneHome Visitors widget on your Matrix Home page, you can find a list of customers who have recently visited their portal, followed by icons to indicate if they saved a search, completed items in the Planner, favorited any listings, or left you a note on a specific property.

Under the My Matrix tab, after selecting Contacts, you can then see each of your contacts' last OneHome portal visits along with any listings which they favorited, discarded, or left a note for you. Click an individual contact record in the list to see even more information including their Planner activities, PropertyFit preferences, Auto Emails, Saved Searches, and more!

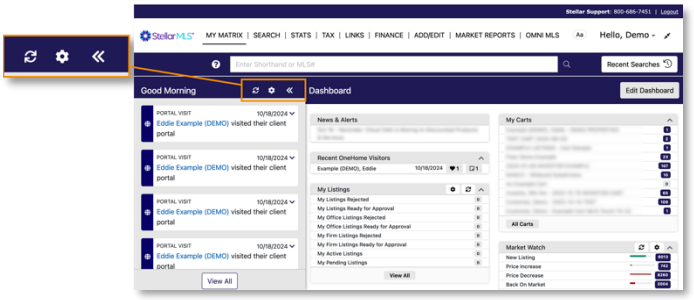


Rather than needing to be logged into Matrix, you can be notified by email, text, or receive a daily email summary when a customer visits their portal, saves a favorite, discards a listing, leaves a note, etc. To begin, click your name near the upper right corner of Matrix and select 'Settings' from the drop-down menu. From the available sections on the next page, choose "Portal Notification Settings". Then just choose how you would like to be notified and click **Save** to lock in your selections. To receive text messages, scroll to the bottom of the page, click the button to edit your cellular information, enter your phone number and provider, and verify it with the code that is sent to you.



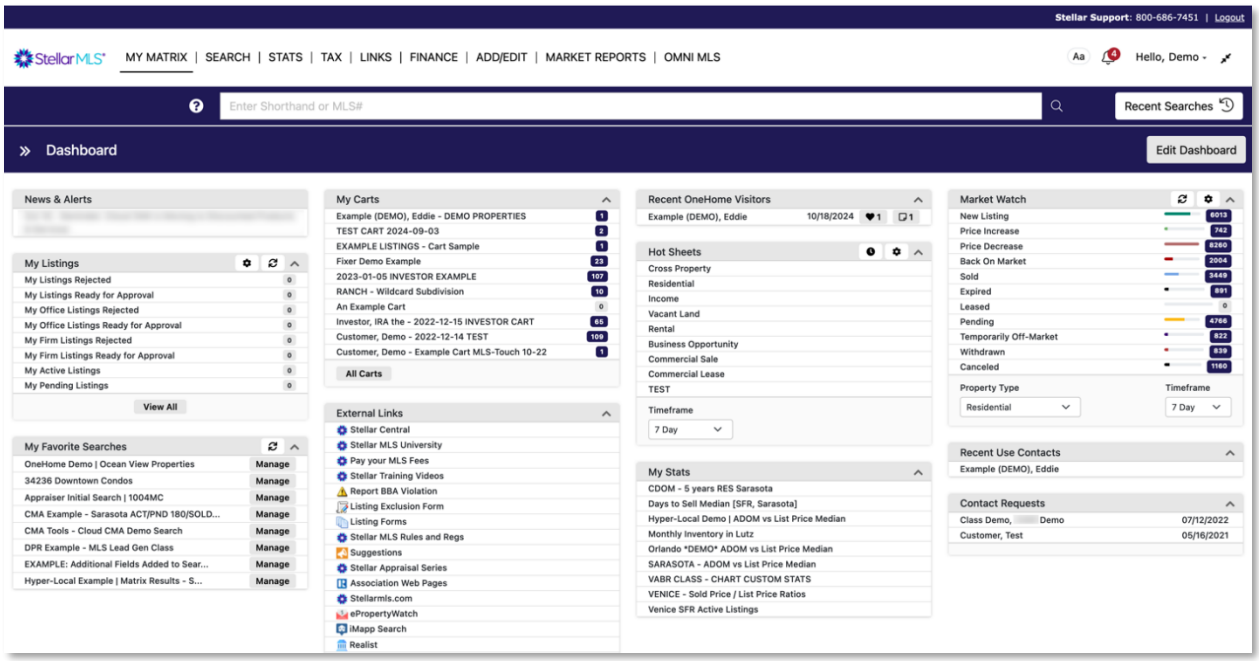
Matrix Notification Timeline & Dashboard Widgets

Matrix Notification Timeline



The Matrix Notification Timeline can keep you up-to-date with information based on your customer's activities as they interact with the listings you email them from Matrix. Use the chevron icon (appears as double arrows) to the left of the word Dashboard to collapse/expand the panel. Once open, two additional icons allow you to either refresh the timeline or change settings (gear icon). The timeline updates automatically at 9 a.m.; after that, click refresh to see the latest activity.

Dashboard Widgets



As you work with Matrix more and more, these dashboard widgets will quickly begin to populate with useful information and some can be even customized, such as market watch and hot sheets to display MLS information for your particular market area (join the Stellar MLS Training Team for other classes to learn even more).

Widgets

Using the Edit Dashboard button located near the upper-right of the Matrix Home page Dashboard, select to display or hide any of the following widgets (with the exception of News & Alerts) as well as reposition their order. You can also click and drag a widget on the dashboard to move it.

News & Alerts – Stellar MLS posts updates here, which could include information on system enhancements, new products, rule changes, upcoming trainings, etc. This is the only widget that cannot be repositioned and will only be visible if there is information to display. News & Alerts, when applicable, is displayed in the first position near the upper left of the Dashboard.

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

- 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.
- 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.

- 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".
- 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".
- 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 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. If selected, up to 10 saved searches can then be displayed by the widget.

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 OneHome Visitors – When listings are emailed to your contacts from Matrix, the customer is sent a link to an interactive portal called OneHome™ where they can then

view and interact with those properties such as marking them as a favorite or sending you a note on a particular property. This widget shows which customers recently visited their OneHome portal as well as some of their activities such as marking a property as a favorite.

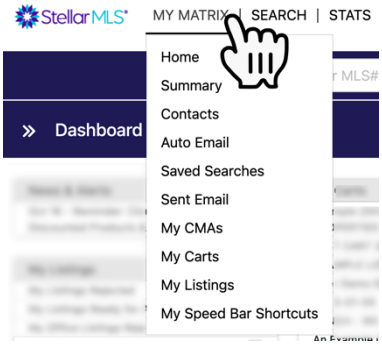
Recent Use Contacts – This widget shows which Matrix contacts have recently had their records updated or have been emailed.

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, Stellar MLS University, the MLS Rules and Regulations, etc.

Training Videos – From the Links menu at the top of Matrix, select Stellar Training Videos for short how-to videos on Matrix tasks such as adding a contact, customizing your results display, and setting up Hot Sheets.

My Matrix Tab



To the right of the Stellar MLS logo is the MY MATRIX menu. Hover your pointer over the words MY MATRIX to display a variety of options. This menu is where you will find links to add/manage contacts, access your saved searches, auto emails, sent emails, your CMAs, carts, access your listings and My Speed Bar Shortcuts.

If you are trying to find something you have added to Matrix™, this may be the location!

A Few Reminders:

To avoid account suspension and a reinstatement fee, please be sure to complete all the required onboarding MLS education courses by your due date (preferably well before!).



Starting Out Stellar



MLS Basic



MLS Compliance

If part of your business will be adding and modifying listings in the MLS, the MLS Adding and Editing Listings course is also required but does not need to be completed within your first 60 days of joining Stellar MLS unless you are the broker of your firm.



MLS Adding and Editing Listings

A Few Suggestions:

Your Stellar MLS Subscription comes with many additional tools to enhance your business. Sign up for our ***Maximizing Your Stellar Subscription*** Course to see all the tools and what they can do for you.

All of Stellar MLS courses are included with your subscription including our CE courses.

Thank you for being a Stellar MLS customer and we wish you all the best in your business!