



Best of Matrix: Searching

1) Speed Bar Essentials

- a) **MLS number - Examples:** *CL339272 OR CM1027866, CM1027664*

You can pull up a listing by MLS number easily by typing it into the speed bar at the top of your screen. You can search for more than one MLS number at the same time.

- b) **Address - Example:** *3492 Orchard*

You can also do an address search by typing in an address into the speed bar. Just type in the street number and the street name as it doesn't recognize the street suffix like circle. But this also means you can type in just the street name of *tavern* and see all listings on a street named tavern if it is a road, lane, etc.

- c) **Agent by name - Example:** *ag john smith OR ag j* smith*

This will allow you to search for an agent by typing in their first and last name or just doing their last name with a first initial followed by the asterisk wildcard. If you just do one name (like the last name), make sure you select the right option in the dropdown.

- d) **Speed bar shortcuts - Example:** */allmylistings* (shown later in class)

You can do searching in the Speed bar (click on the ? to the left of it to see all that syntax that works), but the Detail search is more intuitive. However, one cool thing you can do is save a Speed Bar Shortcut when you do a search. When you are in the search results, click on Save then New Speed Bar Shortcut (instead of New Saved Search or New Auto Email), then give it a name after the /. You can pull this search up quickly anytime by typing in the shortcut in the Speed Bar.

2) RADIUS SEARCHING

There are 3 ways to do a radius search in Matrix; around an MLS number, an address, and a location.

a) **MLS Number – Example:** 3 miles around CL339272

You can do a radius search around an MLS number in Matrix, though it takes a few extra steps. Pull up a search like the Residential Detail and put the MLS number in the MLS number box, and give it a second to find it. Next, click on the map tab and you will see the listing in the middle of the map. Click on the Draw Radius icon on the menu above the map, then click on the icon, hold your left mouse button down, and move away from the property. You will see a circle start to grow and it will give you a distance. continue until you get the radius you want, then let go of the left mouse button. It will finish the shape.

Don't forget this next part. Go back to the Criteria tab, clear out the MLS number you used in the MLS number field. You can now plug in other search parameters and look for listings that are in the radius you drew.

b) **Address – Example:** 3 miles around 7 Corsair Circle

Radius searching is really easy to do around an address or location in Matrix. Let's say that you need to find comps for a client who wants to list their house, but don't know what the price should be. Inside of a Detail Search, find the location section. Choose the number of miles you want, then start typing in the address of the property. You see options show up in the dropdown and click on the right one. You can now plug in your other search parameters, like looking for solds in the last 6 months.

c) **Location – Example:** 3 miles around Barrow Elementary School

For a location, it is basically the same thing. Let's say you have a client looking to buy a property within 3 miles of Barrow Elementary School where he will be the new principal. Just start typing in the name of the school in the box, and you should click on it and start plugging in your other search parameters. If it can't find what you are looking for because there are multiple locations of

The screenshot shows a web interface for a real estate search. At the top, there's a blue header with the word "Location". Below it, a section titled "Map Search:" indicates "No Map Selected" with a help icon. A search bar contains the text "Within 3" followed by a dropdown arrow, then "miles of planet fitness, athens". To the right of the search bar is a link that says "My Location". Below the search bar, a dropdown menu is open, showing a suggestion: "Did you mean: 3658 Atlanta Hwy Ste O, Athens, GA 30606, USA".

something, like a Planet Fitness, just type in a comma and a city as well and you should have luck. Click on the option that is correct in the dropdown.

Honey Tip! You can make any radius search larger or smaller by hovering over the edge of the circle until you see the cursor change into a hand, then hold your left mouse button down and drag the shape to be larger or smaller.

3) THE *WILDCARD*

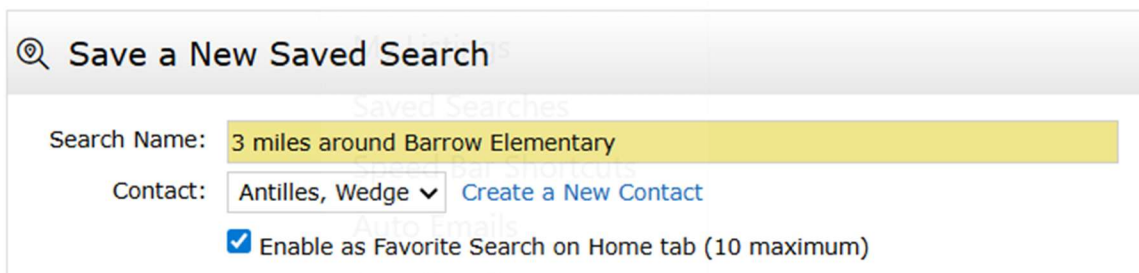
Example: *mother-in-law*, *mother in law*

In the search criteria, you can add a field like Public Remarks and do a wildcard search. Use the asterisk and put in the word or words you would like to find anywhere in that field. Note: if you are looking for something that could be spelled multiple ways, make sure to include that search string like above.

You can also use the wildcard in other text fields like street name, like *tree, to find all listings that are on a street name that ends in -tree.

4) FAVORITE SEARCHES

When you save a search, Matrix allows you to make it a favorite. Just check the box where it says, "Enable as Favorite Search on Home Tab (10 maximum)". It will appear in the Favorites section on the Home Tab when you log into Matrix or click on the Hive MLS logo in the upper left to return to the home screen.



The screenshot shows a web form titled "Save a New Saved Search" with a magnifying glass icon. The form contains the following fields and options:

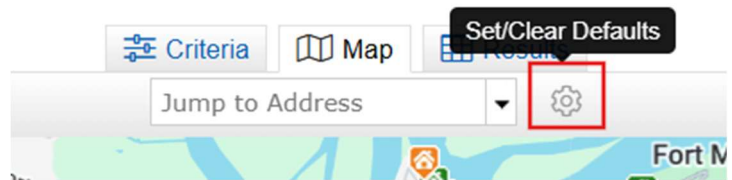
- Search Name:** A text input field containing "3 miles around Barrow Elementary".
- Contact:** A dropdown menu showing "Antilles, Wedge" with a downward arrow, followed by a blue link "Create a New Contact".
- Enable as Favorite Search on Home tab (10 maximum):** A checkbox that is checked, with the text "Enable as Favorite Search on Home tab (10 maximum)" to its right.

5) CHANGING SEARCH DEFAULTS

a) Map

You can change the default map very easily in Matrix. Just start searching, then switch to the Map tab. Zoom in or out or move the map to the area where you work. Once you are there,

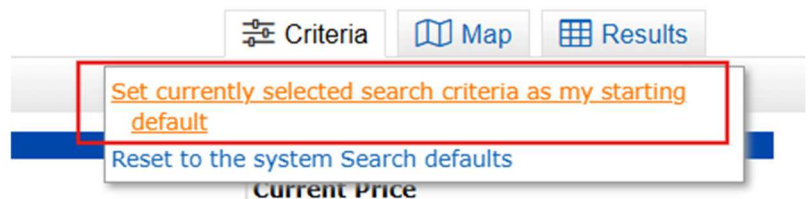
click on the Gear icon (the hover text says Set/Clear Defaults) and click on the "Set this map view as my Starting View" link.



b) Criteria

You can change up the search template. If you want different options automatically checked to save you time (like a specific status, county, or property subtype like single family) when you do a search; just make those selections then click on the Gear icon again. This time, click on the "Set currently selected search criteria as my starting default" link.

The next time you come to do a search, those options will



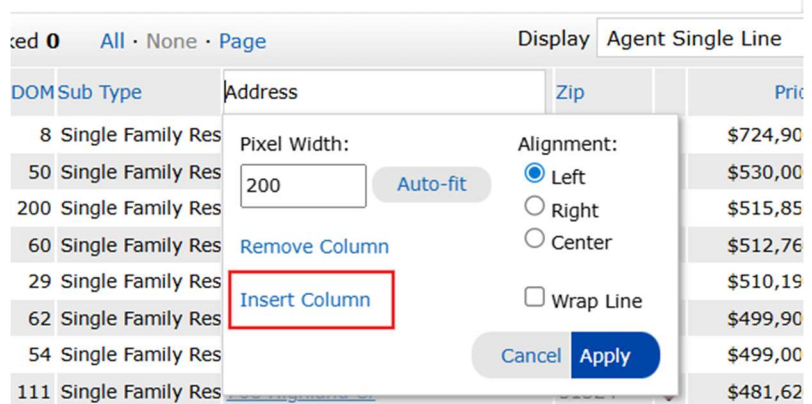
c) Search Results

When you are looking at the Results tab inside of a search, you can make changes to how you see the results.

a) Add a column

To add a column to the display, click on the header where you want to insert a new

column. You should see the option to Insert Column. Click on it and search for the field you want to insert (like CDOM) and click on Apply.



b) Remove a column

To remove a column, make sure to click on the header for the column (i.e. field) you want to remove, then click on Remove.

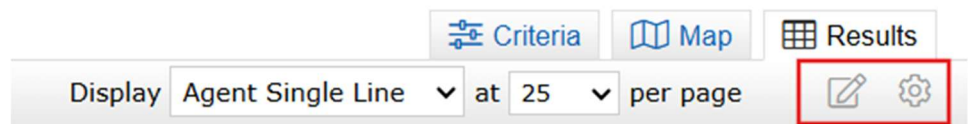
c) Rename a column

To rename, click on the header next to the label of the column. You will see a blinking cursor, and you can change the name. If you click on the actual label, it will just sort by ascending or descending order.

d) Reorder columns

To reorder columns, just hover over the header of the column you want to move and when you see the 4 directions cursor icon, hold your left mouse button down and drag and drop the column to another section.

Honey Tip! If you want to save the changes you have made, you have two options.



You can click Pencil/Notepad icon to manage the display and give it a new name (new display), or you can click on the Gear icon which will allow you to say the display, the number of listings per page, and any sorts if you set them up.

6) MAP SHAPES

You can draw all kinds of shapes on the Map tab. Here is a breakdown of how they work:

a) Circle



For the circle (or radius), just click on the icon then click on the map with your left mouse button and move your mouse out from the spot you clicked. You will start to see a radius, like 1.14 miles. When you

are happy with the radius distance, let your left mouse button go and it will finish the radius. If you need to make a change to the radius, hover over the center of the shape on the red dot

b) Rectangle

For the square, click on the icon then click on the map and start moving your mouse away from the spot you clicked. Unlike the circle, you don't need to hold your left mouse button down. When you are finished with your shape, click on the map again.

c) Polygon

A polygon is also an option when you want to draw on the map. Click on the icon, then click on the map. Every time you click, it gives you another line and you can be quite specific with your polygon shape. Complete the polygon by connecting the lines of the shape together.

d) Free hand polygon

The pen icon allows you to draw shape however you want. Just click on the icon, then click on the map and hold your left mouse button down and trace the shape you want. When you let your left mouse button go, it will finish the shape.

e) Intersection

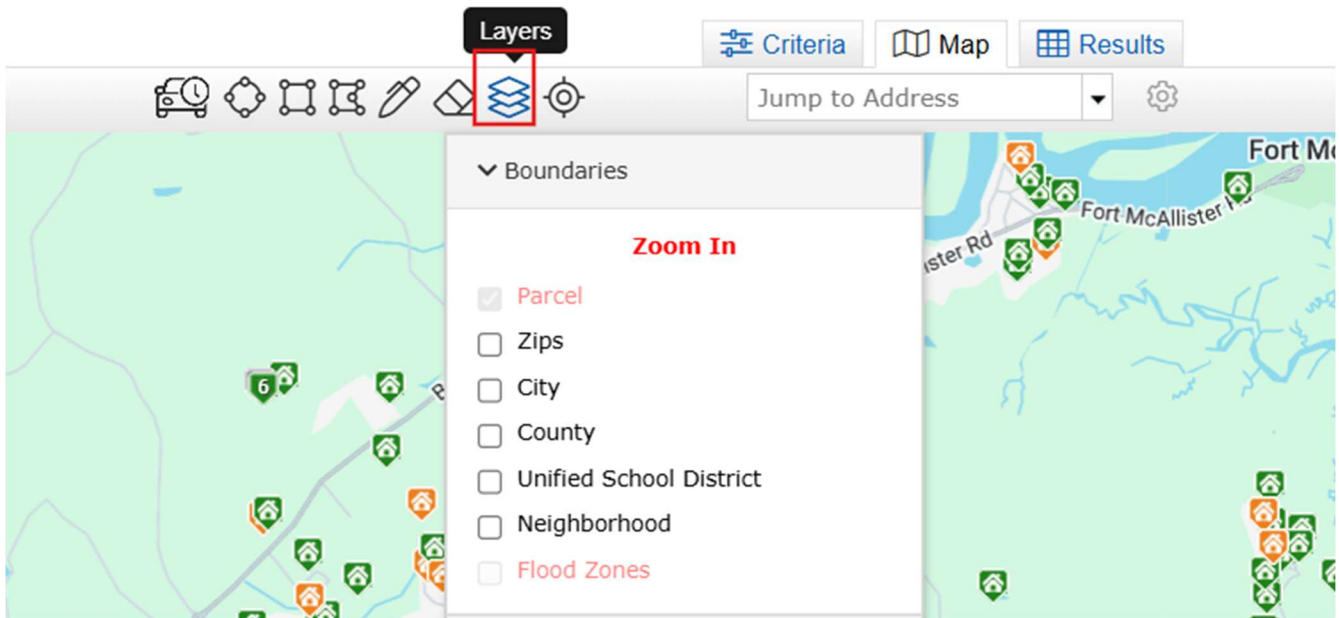
If you draw any shape to overlap another shape and you hover over the red dot for the shape, you will have a new option to "Include Intersection Only". This will show only listings that are in both (or more) shapes.

f) Exclude

Once you have drawn one or more shapes, you can hover over the red dot for that shape and look for the Exclude option. What is cool about this option is you can draw shape inside a shape that already exists and exclude just that section. For example, you can draw a radius search around a location, then draw a polygon that excludes the lower left part of the radius because that area has a few subdivisions with high HOA fees (hypothetically).

7) MAP SELECTIONS

When you are on the Map tab, click on the Layers icon and select something like Neighborhood. If the layers are grayed out and in red text, you need to zoom in on the map to be able to use it. If you don't see the selection tool, then you cannot select it.



Once you are zoomed in, look for the Index Finger icon that has the following hover text: Select Layer as Shape. If it is available, then you can use it for that layer. Click on it, then click inside a layer (like Wiltshire Estates in the Neighborhood layer). It will now just show you listings within that shape. If you click on the icon again, you can select another neighborhood, zip code, county, etc.

8) THE "ALL MY LISTINGS" SEARCH

Do you want to see all the listings you have ever had? It's easy:

- a) Do a Cross Property Search.
- b) On the Criteria tab, click on the two boxes icon below the List OR Sell Agent box in the lower right corner. Type in your last name. You may be listed multiple times if you have moved offices, so select all instances of yourself (hold down the Control key or Command key which you click) then click OK. Your name(s) should be highlighted light blue in the box.

- c) Go back to the upper left corner and click on Select None under the section Status – Date or Range. This will make sure it shows all listings with no date range limitations.
- d) View the results. This is every listing you have touched that is in the system. If you click on Save down at the bottom, then New Speed Bar Shortcut, then you can name it /allmylistings and give it a description.
- e) You can pull it up any time (and it will be up to date with statuses) by typing in /allmylistings in the Speed bar. You could also print this list anytime, or just limit it to sold listings in a particular area to send to a potential client to explain why they should choose you (i.e. you have a lot of experience in particular area).