



MLSOK Tech Support Helpdesk (405) 841-5353

Office Hours: Mon – Fri 9AM – 5PM

mlstechsupport@okcmar.org

Staff:

- John Ferreira *MLS & IT Project Manager*
- Tania Laubach *MLS Technician/IDX Specialist*
- Dustin Graeber *MLS Technician/Compliance Specialist*
- Deonna Triplet *MLS Technician*
- Dawnta *MLS Technician*

What can we do for you?

- The MLSOK Tech Support Helpdesk can help you with your technical needs directly associated with MLSOK Services.
 - 405-841-5353 x 6
 - mlstechsupport@okcmar.org
- The Member Care Department can help you with Active Key or EKey setup and lockbox distribution.
 - 405-840-1493
 - membership@okcmar.org
- The Accounting Department can help you with all your billing questions.
 - 405-840-1493
 - acct@okcmar.org

Notable Websites:

- portal.okc.safemls.net – Portal Page-All MLSOK Services in a single place!
- www.okcmar.org – Oklahoma City Metro Association of REALTORS® Public Site
- www.mlsok.com – MLS Public Search Site

Other Important Numbers:

Supra	877-699-6787
ShowingTime	800-379-0057
Transaction Desk	800-668-8768
Property Panorama	877-299-6306
RPR	877-977-7576
Homesnap	800-431-5509



Matrix:

Create property listings, Schedule open houses, Create and maintain prospect records including creating custom searches for contacts through public portals, Create CMA's, Access in-depth Statistical Reports, Access financial functions.

GoMLSOK:

Mobile MLSOK app for agents and customers. Available through your app store

MLSOK.com powered by HomeSnap

MLSOK's new public search portal. Works in conjunction with the HomeSnap app. Register for your free basic account and connect to clients via app share or personalized link. Clients can "snap" photos of active properties and get listing details via the app on demand. Mobile app available for iOS and Android devices.

Data Co-op:

Provides in-depth analysis of listings by combining demographic information, neighborhood information, school reports, public records, and MLS data all in one place. Also have access to properties from a variety of other markets outside of MLSOK.

Realist:

Access public records information. Auto-fill listing information directly into new listings.

Value Map: Realist tool that provides property valuation data.

Property Panorama:

Easily create virtual tours using photos included on property listings.

TransactionDesk:

Online transaction management system. Track work flow of the complete transaction in one place, including all "key players" such as the buyer, the seller, the appraiser, the home inspector, etc.

Electronically submit forms to each person as needed all from one centralized location.

Authentisign:

Digital signatures for contracts all housed and recorded in TransactionDesk.

ShowingTime:

Automated showing service integrated into each listing in Matrix. Accessible through Matrix and GoMLSOK.

MarketStats:

Analyze local trends quickly with elegant and easy-to-use stats in a new suite of market reports and interactive tools called MarketStats, including InfoSparks, FastStats, Local Market Updates, Monthly Indicators and the Lender-Mediated Report.

ListHub:

Broker managed tool that allows listings to be syndicated to over 300 websites.

Supra:

Provides Lockboxes and Keys (or key software for smartphones) to licensed agents and brokers for security on property listings.

Matrix Training Outline

- Browser Compatibility
 - Platform Agnostic
 - Home Page
 - Customize
 - Widgets
 - Dynamic
 - Hot Sheets
 - Market Watch
 - My Favorite Searches
 - My Listings
 - My Stats
 - My Carts
 - Recent Use Contacts
 - Concierge
 - External Links
 - Static
 - News & Alerts
 - Links
 - Realist Tax
 - Ancillary product used to search property data.
 - Beneficial when MLS Listing does not exist.
 - Allows you to generate mailing labels.
 - Finance
 - Market Reports
 - Agents can generate productivity reports.
 - Brokers can generate office productivity reports.
 - Mobile – Obsolete – Use GOMLSOK or HomeSnap Mobile apps
 - Help
 - My Matrix
 - Contacts
 - Creating New Contacts
 - Drilling down through the Contacts
 - Portal
 - Carts
 - My Listings
 - Broader scope than My Listings Widget.
 - My Hit Counters
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Matrix Training Outline

- My Information
 - Pulled from Membership System
 - Override personal data
 - Acceptable circumstances (i.e., Changing First Name to your nickname)
 - Warnings (i.e., what is affected when you change your email address)
 - Header & Footer
 - Preconfigured defaults
 - Customize your own Header
 - Photos are important – Stay Tuned for why
 - Mobile Header
 - Preconfigured defaults
 - Customize your own Header
 - Photos are important – Stay Tuned for why
 - CMA Cover Sheet
 - Portal Information
 - Email Signature
 - For extra flair, add a photo
 - My CMA's
 - Delete after 180 days
 - Sent Email
 - Reflects ALL sent email you send out from Matrix.
 - For ALL contacts
 - For ALL non-contacts
 - Quickly see what date/time email was sent and what was sent.
 - Settings
 - My Information (COVERED ABOVE)
 - Speed Bar Shortcuts (Will Discuss at the end of class)
 - Team Settings
 - Can grant permission to agents in your firm
 - Hot Sheets (COVERED CUSTOMIZATION ABOVE)
 - Custom Displays
 - You can create a view that's just right for you.
 - Will cover more in depth
 - Custom Exports
 - Great if you export data from MLS to other products.
 - Portal Greeting
 - Create greeting that will go out to ALL your portals in one place.
 - Great if you are going on vacation or to promote yourself.
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Matrix Training Outline

- Saved Searches
 - Auto Emails
 - Searches going out to Clients on a custom frequency
 - Warning – Welcome Email!!!
 - Status Column
 - Add/Edit
 - New Input Layout
 - Required Fields
 - Adding Photos/Disclosures
 - ONE photo is **required** before listing can be made active.
 - MLSOK allows up to 36 photos.
 - Workflow Process: Taking incomplete listings to Active.
 - Stats
 - Default Stats set
 - Customize to your needs
 - Can be sent to client upon request.
 - Save Custom Stats for your use.
 - Search
 - What are wildcards
 - Hyphen (-) = Used when giving a range (i.e., Dates, Price Ranges, etc.)
 - Plus (+) = Greater Than
 - Minus (-) = Less Than
 - Asterisk (*) = Wild card (i.e., Used in fields like Legal Addition)
 - Exclamation (!) = Does not contain
 - Search Help
 - Map Search
 - Results
 - Photos
 - Map Location
 - Tax Information
 - Attachments / Disclosures
 - History
 - Transaction Desk
 - ShowingTime
-

Matrix Training Outline

- Open House
- Custom Display
 - Save new custom display
 - Make new custom display default
- Actions Bar
 - Criteria
 - Email
 - Print
 - a. Custom Reports
 - b. Print Agent Header & Footer
 - c. Print w roll-outs
 - d. Email PDF
 - e. Print to PDF
 - f. CMA-One Line
 - g. Agent Full One Page – Why is the font so small?
 - CMA
 - Directions
 - a. Change directions
 - b. Add Start/Stop
 - c. Email Directions to Client
 - Stats (Slimmed down version of 1 Line CMA)
 - 1-Line CMA
- Refine
 - Narrow = (only display the listings you checked)
 - Toggle back to original results
- Save
 - Create Saved Search
 - Create Auto Email
- Carts
 - Put listings in cart that you might be watching
 - Put listings in cart to get driving directions
 - Retention
 - Removal
- Speed Bar
 - Create custom speedbar
 - Use Speedbar to look for:
 - Agents
 - Offices
 - Open Houses

Matrix Training Outline

- Listings
- Custom Speed bar shortcut
 - a. Start with basic search
 - b. Save Search as Speed bar Shortcut
 - c. Use new speed bar shortcut

MLSOK Matrix Training

Team Function

Many agents work as part of a real estate team, which is why Matrix now has a Team Function. Teams can consist of groups or two agents taking care of each other's clients while on vacation. There are many different versions of teams. The Matrix Teams functionality makes it possible to add other agents to a team, and also make it possible for another agent to add you to their team.

Agents (or their assistants) may work on behalf of another agent. It is also possible to impersonate another agent.

Matrix will only allow you to add others to your team who have an Active Matrix ID on the system.

Impersonate Another Agent

If an agent you work with added you to her team in Matrix and set you up to impersonate her, you would be able to do the following things:

- Emails sent from Matrix would be sent from her name and email address, and would use her email banner and footer (if she had chosen one) and email signature.
- Print reports – any reports that are printed while impersonating another agent will have the information of the agent being impersonated in the “Courtesy of” information. In other words, the report will look as if it were printed by the agent that you are impersonating.
- Access another agent's Matrix Contacts, Saved Searches (you cannot change her team settings) When you send an email from Matrix while you are impersonating another agent, the name and email address in the “From” line will be highlighted in yellow. This is to call attention to the fact that you are sending that email as that agent. This means that to the client, the email will look exactly as if it came from the agent being impersonated.

Working on Behalf of Another Agent

If an agent you work with added you to his team in Matrix and set you up to work on behalf of him, you would be able to do the following things while working on behalf of him in Matrix:

- Emails sent from Matrix would be sent from your name and email address on his behalf, and would use your email banner and footer (if you have chosen one) and email signature.
- Print reports - any reports that you print while working on behalf of another agent will indicate that they were printed by you on behalf of the other agent.
- Access his Matrix Contacts, Saved Searches (you cannot change his team settings)

Adding Other Agents as Your Team Members

Each Matrix user that is added to your team will have full access to your Matrix account and can either “impersonate” you or “work on your behalf,” depending on the type of access you grant them.

MLSOK Matrix Training

How to set up a team

Click the My Matrix Tab, then the “Settings” link. At the bottom of the My Settings screen, you will find the Team Settings section. Click the link labelled “Click here to create a Team” and then again on the next screen.

Type in the agent ID for the agent you want to add to your team. If you do not know the ID, you can find it through an Agent Roster search (Roster tab).

Select whether you want this colleague to Impersonate you or Work on Behalf of you. Click the “Add” button.

After adding your first team member, you will come to the main Team Settings screen shown above.

Here you can control the following:

- Add additional team members (click the link “Click here to add a team member and/or someone that can work as you.”)
- Delete team members or edit their impersonate/work on behalf status.
- Name your team (optional). Be sure to click the “Save” button after typing in your name.
- Set yourself up to either impersonate or work on behalf of the team.
- Allow team members the option of switching between their own names and the Team name when printing and emailing to Team Contacts. Be sure to click the “Save” button after checking or un-checking this box.
- Disable the team function.

After enabling the Team function, you will be alerted to it on the Home page each time you log in: A link is included to go straight to the Team Settings screen.

When one of your team members logs in, they can switch from their own individual login to the Team login by clicking on their name in the upper right corner of the screen to open the select popup. There he can click to select the team name (or your name if you did not create a team name).

They can now see in the upper right (and highlighted in yellow on the Home page) that they are

working as the team. When they click on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to your (the Team’s) items. When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone:

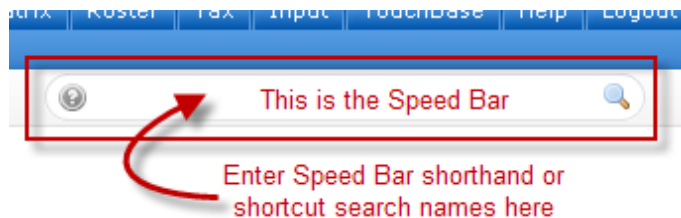
If they are set to impersonate you, they have the same choice except that if they select the Team, it will use your email address, not theirs.

To leave working as the team and go back to working as yourself, click the “Working as” link in the upper right of the screen and click to select your own name.

MLSOK Matrix Training

Speed Bar

The Speed Bar is a multipurpose searching tool will allow you to run a search from any screen.



The Speed Bar accepts two types of input:

- **Speed Bar Shorthand:** a series of simple codes you enter into the Speed Bar. Matrix translates your entries into search criteria and runs the corresponding search.
- **Speed Bar Shortcuts:** any Matrix search that you've Saved As a Speed Bar shortcut. Enter its name in the Speed Bar and Matrix runs that saved search.

Shorthand Tips:

- Keep it simple and case doesn't matter
- Combine your Shorthand codes in any order (except for bedrooms and bathrooms)
- Put spaces between Shorthand codes, not commas
- Check the criteria on the results page to ensure it searched for what you asked for

Speed Bar Shorthand Examples:

- **ML Numbers:** 5163732 or 5163732 5193474
- **Status:** A for Active; S for Sold
- **Property Type:** RES, LND,
 - Examples: RES for Detached Single Family, A CP for Active Cross Property
- **Street Number and Name:** 123 Main (enter exact Street Name and omit Street Type)
- **Street Name:** Main (enter exact Street Name and omit Street Type)
- **City:** City name
- **County:** (Short Value)
- **Price (In Thousands):** \$500-550 or \$500+ or \$500-(this is the current price for Actives; the Sales Price for Solds)
- **Bedrooms and Bathrooms:** 4+ 3+ for 4 or more bedrooms and 3 or more bathrooms
- **Approx Square Feet:** 2000+ sqft or 2000-2500 sqft
- **Acres:** 20 acres or 2-4 ac
- **Open Houses:** OH 7/20/2014 or OH 0 (0 means today)
- **Agent Search:** AG Brown or AG Adam Brown
- **Office Search:** OFF Century*

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Combining Shorthand Codes - Examples:

- RES for Active listings
- RES 30032 for Active listings in Zip Code 30032
- A 30032 \$800+ 4+ for Active in 30032 at \$800,000 or above with 4 or more bedrooms

Field Examples:

Status: A, ACT, PEND, CLOSD, EXP, WITH, RELD, OFMKT

Price (in Thousands): You must use a '\$' before the dollar amount.

- \$300 --> Price equals \$300,000
- \$300-350 --> Price between \$300,000 and \$350,000
- \$650+ --> Price equal to or greater than \$650,000
- \$300- --> Price equal to or less than \$300,000

Beds: You may add a space and "beds" or "bd" after the number, but are not required to do so.

- 3 bd--> Exactly 3 Bedrooms
- 3-5 --> Between 3 and 5 Bedrooms, inclusive
- 3+ --> Equal to or greater than 3 Bedrooms
- 3- --> Equal to or less than 3 Bedrooms

Full Baths: You may add a space and "baths" or "ba" after the number, but are not required to do so.

- 3 ba --> Exactly 3 Full Baths
- 3 baths --> Exactly 3 Full Baths
- 3-5 --> Between 3 and 5 Full Baths, inclusive
- 3+ --> Equal to or greater than 3 Full Baths
- 3- --> Equal to or less than 3 Full Baths

Zip Code: Enter a 5 digit Zip Code

- 30022
- 30096 30097

Approx Square Feet: You must add "sqft" or "sf" after the number.

- 3000+ sqft --> Equal to or greater than 3,000 sqft

2000-2750 sf --> between 2,000 and 2,750 sqft, inclusive