

WELCOME TO MATRIX™



Charlotte Regional Realtor® Association



Carolina Multiple Listing Services, Inc.



WHY MATRIX?



- **Easy to Use**
- **It's Fast!**

WHY MATRIX?

Enhanced Client Portal

The screenshot displays a user interface for a real estate client portal. At the top right, it says "Welcome Cam Newton" and "Help". A notification bubble indicates "You have unread notes". Below this, a message from Caroline Grubb is shown, followed by a table of direct emails and reports, a list of recent notes, and sections for My Searches and Auto Searches. A sidebar on the left shows the agent's profile and a listing for 15521 Jetton Road.

Caroline Grubb
704-338-9401
caroline.grubb@carolinahome.com
Association Staff

15521 Jetton Road

MLS#: 2003789
Status: ACT
Price: \$4,500,000
Total HLA: 10,321
Beds: 6
Baths: 6/5

A message from Caroline Grubb:

Hi Cam,
So, here you will find everything I've sent you, the ones you've marked as favorites and possibilities. All of our correspondence will be available right here! Enjoy and let me know if you have any questions!

Direct Emails and Reports

Type	Subject	Sent
Land	Something Outside of or Regular Search	Mar 17 2014
Statistics	Historic Count of Active Listings	Mar 13 2014
Statistics	Historic Sales x Price Range	Mar 13 2014

Recent Notes

MLS #	Note	Noted
2178297	Me Not sure if Vale is a viable option but I'm not ready to discard it yet. Caroline Grubb Let's talk about it next time we are together.	Mar 13 2014 Mar 19 2014
2043616	Me Not a bad idea, but we need to think about it. LOTS of work and time needed to build a house!!	Mar 17 2014
2214078	Me not sure if i love it or hate it. will keep for now as a possibility!	Mar 17 2014

Listings With Unread Notes: 1 Listings With Notes: 3

My Searches
Start a New Search

Auto Searches
Keep Cam In Charlotte
Farm Property

It's Not Just The MLS System

ShowingTime

Tech Support and
Compliance

Realist

Go CarolinaMLS App

Statistical Analysis
Module (SAM)

ListHub Data
Syndication Platform

Clareity/
SAFEMLS

Realtors® Property
Resource (RPR)

RatePlug

FIND

SHOWINGTIME

- MLS-wide showing services since 2007
- Included in subscription
- The largest MLS-wide ShowingTime client in the country
- An integral part of our member benefits
- 24/7 call center support

REALIST

- Arguably the best third-party tax database on the market
- Separate system integrated into Matrix
- Access to all 100 counties in N.C.
- Access to all 46 counties in S.C.

STATISTICAL ANALYSIS MODULE

- Popular member tool for generating statistical reports
- Static monthly reports include:
 - Monthly Indicators Report
 - Housing Supply Overview
 - Lender Mediated Report
 - Local Market Update
 - Rental Report
- Static weekly, quarterly and annual reports as well

CLAREITY SAFEMLS

Provides
Single-Sign-On
(SSO) to third
party programs.

Monitors the
system for
password sharing
and abuse (SSO)
to third party
programs

Reinforces
membership
policies.

TOP-NOTCH TECH SUPPORT

- Local tech support staff
- Staff is courteous, knowledgeable and responsive
- Members do not need to call an 800 number staffed by vendor employees who may not be familiar with our system
- Staff will contact the vendor on behalf of our members for advanced issues



FIRST-RATE COMPLIANCE DEPARTMENT



- Recognized on a national level for familiarity with NAR policies
- Helps members avoid trouble
- Consistent policies and enforcement
- Ensures the accuracy of data
- Increases the value of MLS



TIMELINE FOR CUTOVER

- Feb. 5 – Training begins
- Jan. 30-Feb. 14 – Parallel on live CarolinaMLS
- Feb. 13 – Paragon search only (mid-day), no input in Paragon or Matrix for MLSCV between mid-day Feb. 13 and 10 a.m. Feb. 14
- Feb. 14 – 10 a.m. Add/edit enabled for MLSCV users



PARALLEL PERIOD

- Data flow from Paragon to Matrix will be regularly updated.
- Members must continue to use Paragon to add, edit and update listings.
- It is no longer necessary to input listings into Paragon and Matrix. Input your listing into Paragon only, and the listing will appear in Matrix as well. This will continue until the cutover on Feb. 14, when add/edit will be enabled in Matrix.
- Once a contact's information is modified in Matrix, the flow of contact data from Paragon will cease, and the contact will not be updated if it is later modified in Paragon.
- After the cutover date, Paragon will be taken offline permanently.



CONVERSIONNOTES

- Public Remarks: Expanded to 1,000 characters! All converted.
- Agent Remarks: 500 characters. If Agent Remarks exceeds 500 characters it will overflow into Company Remarks.
- Showing Remarks: Displayed on staging for testing, but will be omitted from reports on live. ShowingTime does not use the Showing Remarks in Matrix. Showing instructions must be provided directly to ShowingTime. Only agents with confirmed appointments should have access to confidential showing instructions.
- Syndication Remarks: 1,100 characters. All converted.
- Special Conditions: Populated from various fields. Cleanup will be necessary.

CONVERSIONNOTES



- Heated Other: Mapped to Second Living Quarters HLA.
- Unheated Other: Mapped to Additional SqFt.
- Agent and Office IDs will be preceded by “CV” to log into Matrix (example: CV12345).
- Single Family and Condo/Townhouse are separated into two different property types for listing input.
- Matrix has a separate property type for residential rentals. No rental data has been populated from Paragon to Matrix.
- (Paragon) Contingent, Pending Active = (Matrix) Under Contract Show
- (Paragon) Pending, Pending Lease Option = (Matrix) Under Contract No Show

- Area fields (there will be a map overlay of MLSCV areas)
- Financials
- Incomplete listings
- Saved spreadsheets
- Assume identity
- Custom reports
- Contact activity
- Customized default search
- Disclosures field (use Attachments instead)
- CMAs
- Terms (Commercial/Land)
- Email signature and templates

**WHAT DID
NOT
CONVERT**

WHAT DID NOT CONVERT

- Heat Year
- HOA Includes
- Insurance Expense
- Management Expense
- Marketing Date
- Number of Lots
- Other Assessments
- Other Expense
- Roof Year
- Sale Rent
- Under Ground Storage Tank
- Water Sewer Expense

WHAT NEEDS TO BE DONE BEFORE CUTOVER?

- Make note of custom reports
- Print or make note of CMAs
- Make note of financials
- Make note of incomplete listings
- Convert Area searches (use county or city fields, etc.)

MARKETING DATE

- Marketing Date = Effective Date or Delayed Marketing Date from the listing agreement
 - Listings must be input within two business days
 - If the listing will be marketed prior to being input into Matrix, then CarolinaMLS staff must receive a signed “Seller Authorization to Withhold Listing from CarolinaMLS” form

SAVED SEARCHES/CONTACTS

- (imported) will appear beside each search that is brought over from Paragon into Matrix.
- (+) it means it was attached to an auto email, and the users will be able to link the search to the contact.
- (*) means there is a discrepancy in the search criteria.
- Auto-emails are disabled until the user sends an invitation to the customer, AND the customer accepts the invitation.
- Map coordinates will not come across in the conversion for saved searches, and the map area must be redrawn.

SYNDICATION

- ListHub: Offices will need to create a new ListHub account
- For existing offices, syndication to realtor.com® and Zillow will continue (except for the offices that have opted out of Zillow)
- New offices joining MLSCV must affirmatively opt in for listings to be syndicated to realtor.com® and Zillow
- Member Participants control the office's syndication settings on the add/edit screen in Matrix

SYNDICATION DEFAULTS

Office Syndication

Office ID: 0522

Please select the Syndication(s) that your office requires.

Office Syndication

- Buyer Acquire
- CarolinaHome.com
- Charlotte Observer
- Homes and Land
- Homes.com
- IDX
- IDX_Address
- Prospects Plus
- Realtor.com
- Zillow Group

* CarolinaMLS does not have a contract with Zillow Group. Member Participants electing to opt in to syndication with Zillow do so at their own risk and should carefully read and consider the Zillow Terms and Conditions before agreeing to them. CarolinaMLS will not be able to assist you with any questions or complaints regarding your listings on Zillow. By checking this box, you understand and agree that your listing data feed will be subject to the following Zillow Terms and Conditions: <https://www.zillow.com/corp/Terms.htm>

WHAT'S NEXT?

- Matrix Minute!
- Webinars
- Online manuals
- Additional training - à la carte classes
- Enjoy the speed and reliability of Matrix

FEEDBACK

Please email all questions and feedback to:
carolinamls@carolinahome.com

704-940-3159

828-239-2900

Thank you for helping us with this important task!



THANK
YOU