

Matrix

Conversion Guide



For Support: (800) 925-1525

Support Hours:

M-F 8:30 AM – 9:00 PM

Sat-Sun: 10:00 AM – 3:00 PM

www.crmls.org/support

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Welcome

Welcome to the CRMLS Matrix Platform. CRMLS Matrix is the industry’s top rated MLS platform offering an ultra-modern and flexible environment. This manual will help you verify that all of your information was migrated from your original MLS, give you a basic introduction to the CRMLS Matrix Platform, and guide you through performing basic searches, viewing search results, and printing and emailing listings. Follow the steps in these sections to get started.

- “Disabling Pop-up Blockers” below
- “Accessing the CRMLS Matrix Platform” on page 3
- “CRMLS Matrix Platform Navigation Overview” on page 5

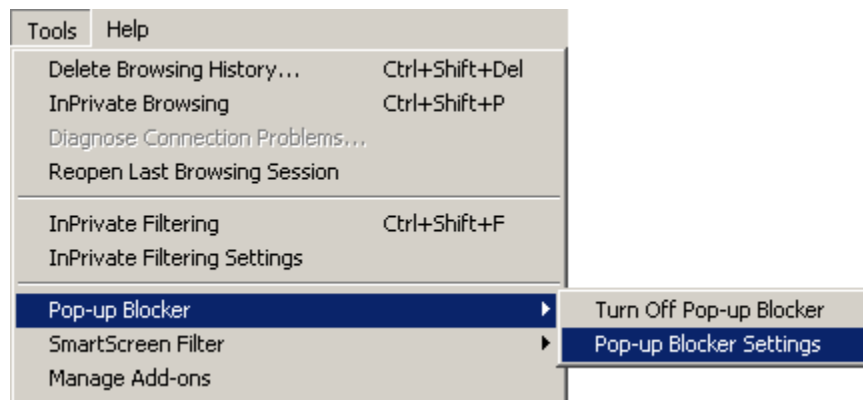
Disabling Pop-up Blockers

Your computer may have an Internet browser or security software that blocks Internet pop-ups. CRMLS products utilize help screens and other features that may be blocked by some pop-up blockers. Follow the steps below to allow pop-ups from CRMLS products in Internet Explorer.

Note:

For information on allowing pop-ups from CRMLS products in other Internet browsers or security software, refer to your application’s documentation.

1. In Internet Explorer, select **Tools > Pop-up Blocker > Pop-up Blocker Settings**.



2. Add the following websites to the Allowed sites list:
 - <http://crmls.org> (CRMLS Website)
 - <http://www.mrmlsmatrix.com> (CRMLS Matrix)
 - <http://realist2.firstamres.com> (Realist Tax)

Accessing the CRMLS Matrix Platform

The first time that you log into the CRMLS Matrix Platform, you will be taken through a login enrollment process. Follow the steps below to access the CRMLS Matrix Platform.

1. Open your web browser and go to <http://www.crmls.org>.
2. Click the **CRMLS Matrix** button.



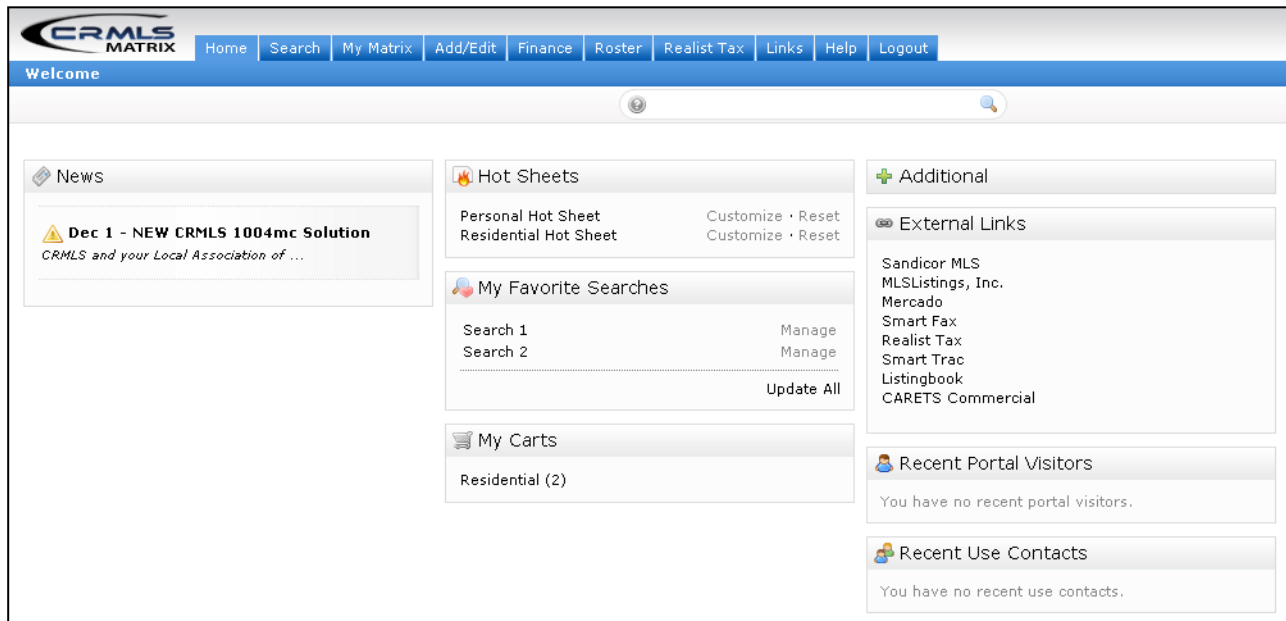
3. Enter your Discover Username in the User ID field.
4. If you have recently changed your password in Discover, enter your current password in the Password field.

If you haven't recently changed your password in Discover, or are having difficulty logging in, try using "discover" as your password. Once you log in, you will be prompted to change your password. If you're still having difficulty logging in, contact the CRMLS support department as described on page 51.



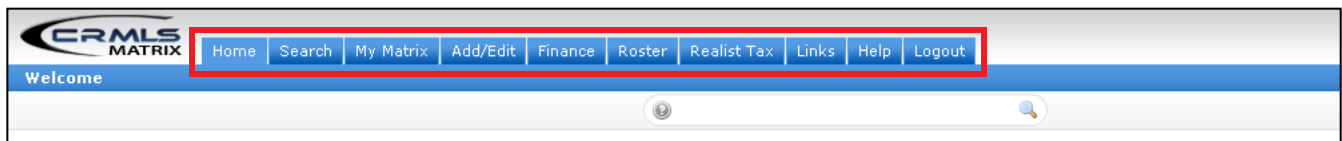
5. Click **Login**.
6. Read and agree to the Terms of Use and End User License Agreement to continue.
7. Answer the three secret questions that will be used to identify you in the event that you forget your password.
8. Follow the prompts on the screen to complete the enrollment process.

Once you have finished the enrollment process, you see the CRMLS Matrix Platform Home screen.



CRMLS Matrix Platform Navigation Overview

The CRMLS Matrix Platform utilizes navigation tabs to separate the different sections of the system.

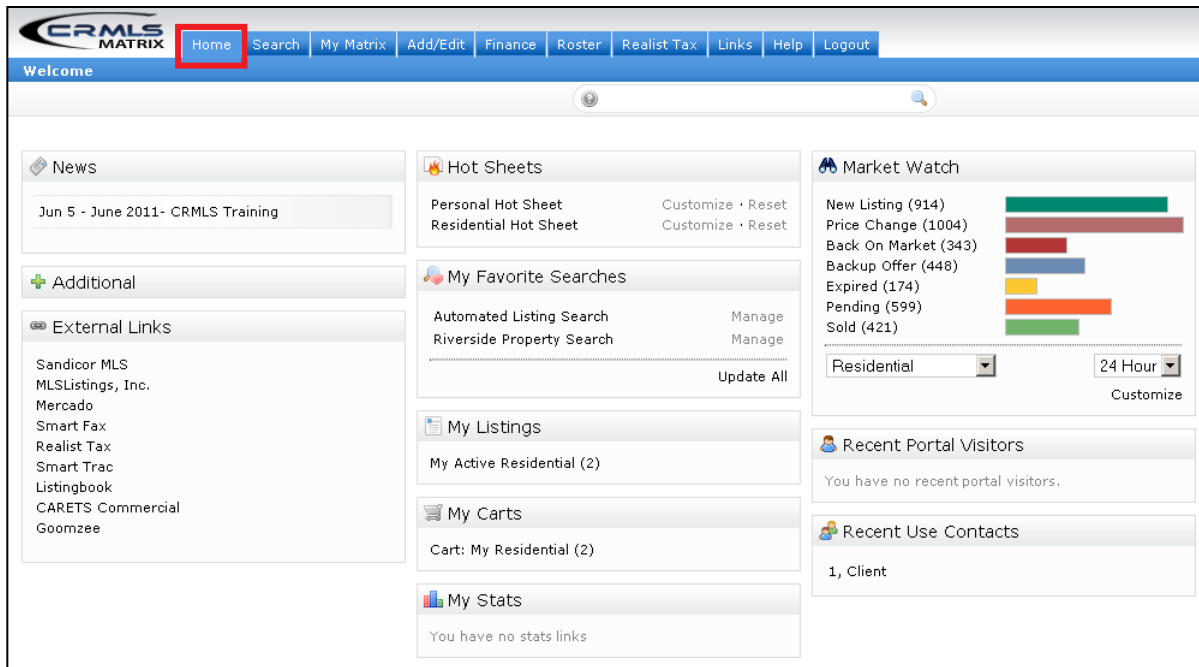


Refer to the following sections for a description of the tabs and items available:

- “Home Tab” on page 6
- “Search Tab” on page 7
- “My Matrix Tab” on page 7
- “Add/Edit Tab” on page 8
- “Finance Tab” on page 9
- “Roster Tab” on page 9
- “Realist Tax Tab” on page 10
- “Links Tab” on page 10
- “Help Tab” on page 11
- “Logout Tab” on page 11

Home Tab

The Home tab gives you quick access to everyday tasks and is the first tab you see when you log in to the CRMLS Matrix Platform.

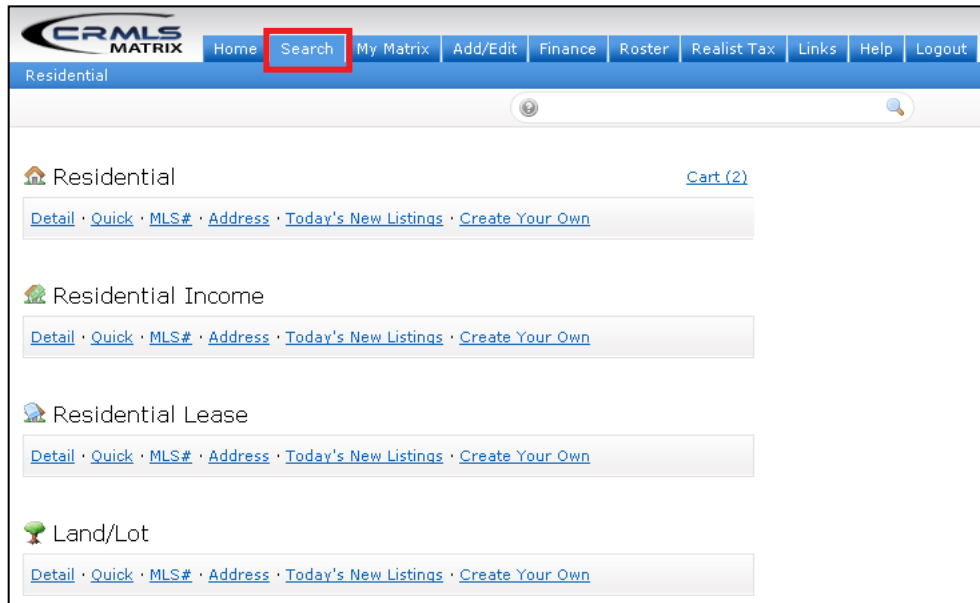


The Home tab gives you quick access to the following items:

- **News:** Displays current updates, releases, and important information from CRMLS and your Local Association/Board of REALTORS®.
- **Hot Sheets:** Displays the latest market changes from your custom criteria.
- **My Favorite Searches:** Displays up to 12 saved searches and provides instant access to view listing updates based on your saved search criteria.
- **External Links:** Provides access other CRMLS products and MLS systems, provided by your Local Association/Board of REALTORS®.
- **Recent Portal Visitors:** Displays a list of clients that have viewed listings sent using the Email Portal feature.
- **Recent Use Contacts:** Displays a list of your most recent clients in the CRMLS Matrix Platform.
- **My Carts:** Displays a list of all listings for each property type in your cart folder.
- **My Listings:** Displays a summary of your listings and allows you to quickly access them.
- **Market Watch:** Displays market changes from your custom criteria.
- **My Stats:** Provides quick access to your saved Stats Presets.
- **Concierge:** Displays a list of Auto Emails that contain listings waiting for approval.

Search Tab

The search tab allows you to search for listings by property type, including Residential, Residential Income, Residential Lease, Land/Lot, Mobile Homes, and Listing Crossproperty. You can also search for Open Houses, Caravans, Property History, and Change Type History.

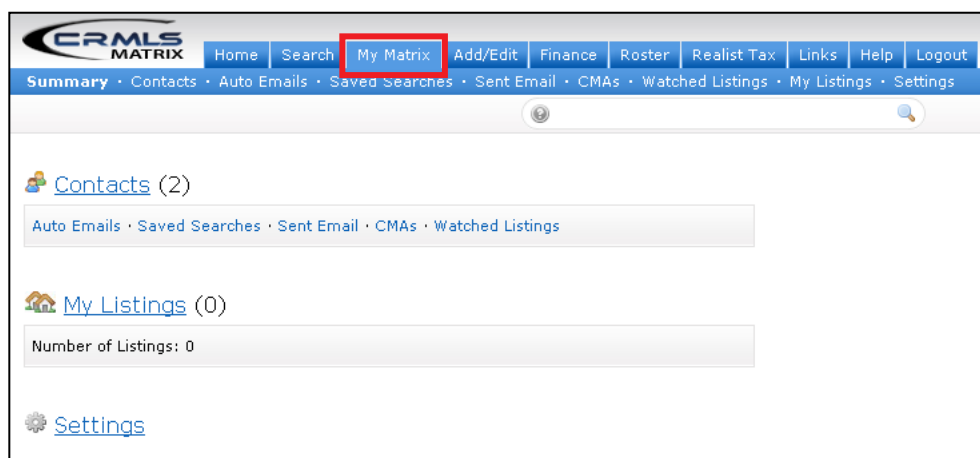


Note:

To search for Commercial/Industrial properties, Commercial Leases, or Business Opportunities, use the CARETS Commercial system instead. To access CARETS Commercial, click the **CARETS Commercial** link on the Links tab of the CRMLS Matrix Platform.

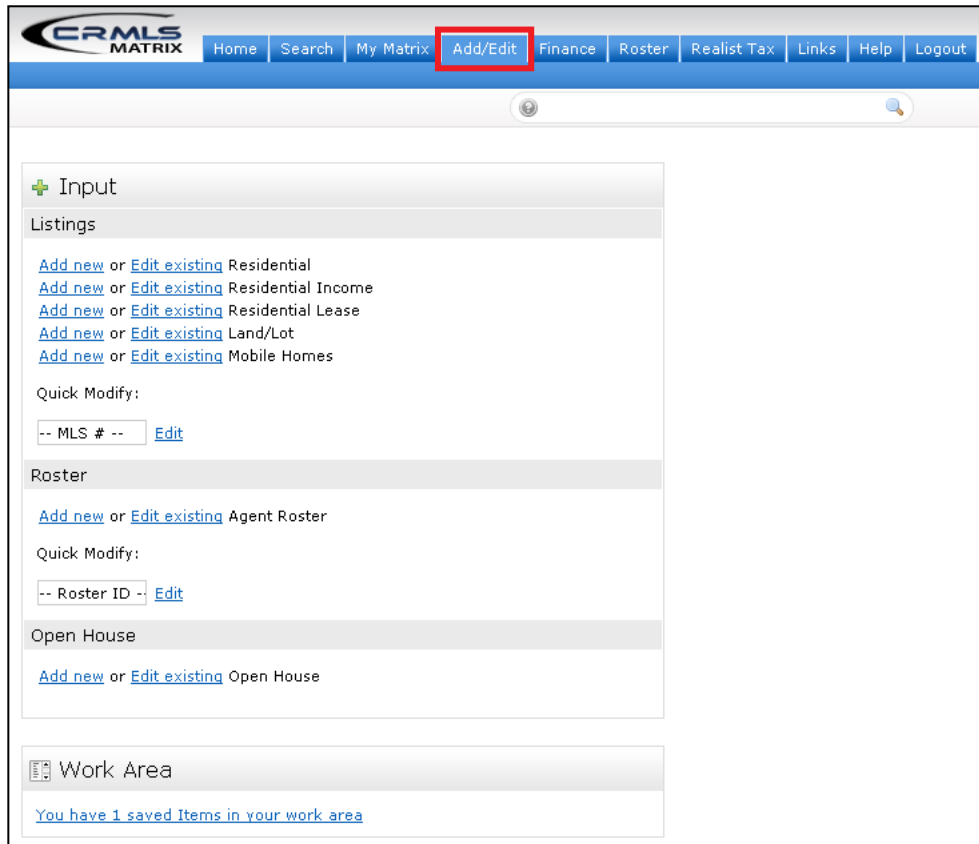
My Matrix Tab

The My Matrix tab allows you to manage your contacts, auto emails, saved searches, manage your listings, and customize your account settings.



Add/Edit Tab

The Add/Edit tab allows you to add listings, modify listings and open houses, and retrieve partially completed listings in the Work Area. You can also edit your contact information (see “Verify Your Contact Information” on page 13 for details).

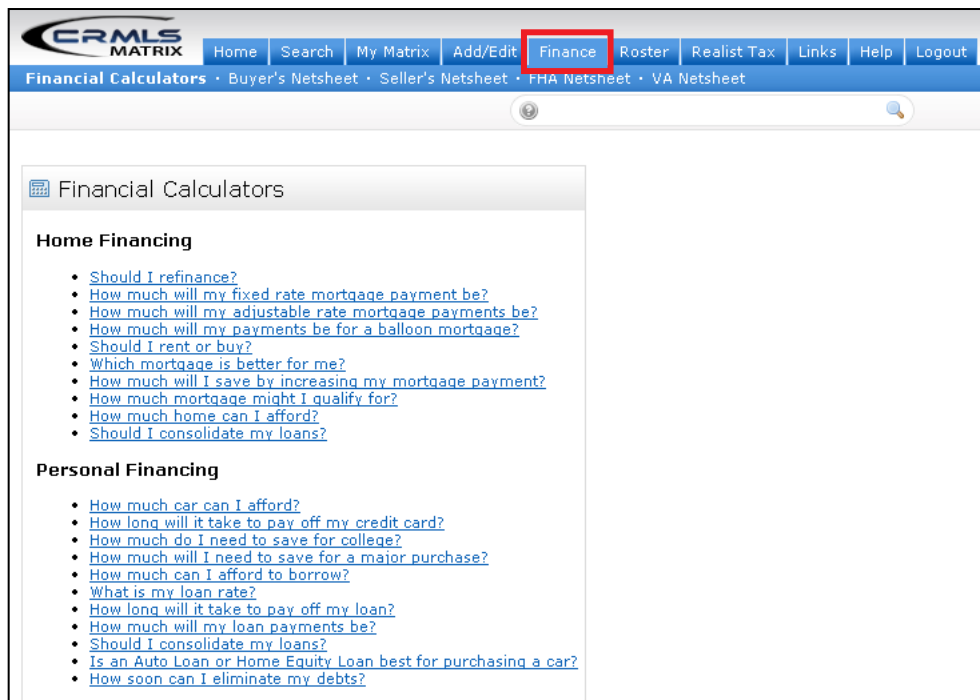


Note:

Partially saved listings in the Matrix Platform are available in the Work Area until you remove them. Draft listings from Discover CA were not migrated to the CRMLS Matrix Platform.

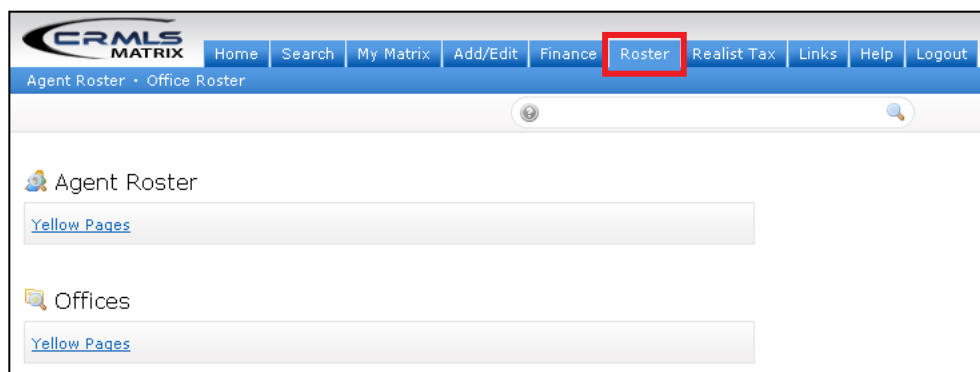
Finance Tab

The Finance tab contains Netsheets and various home financing, personal financing, investment, and retirement calculators.



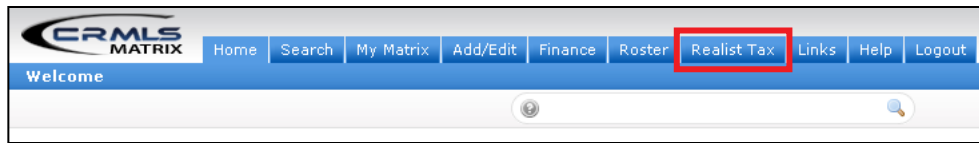
Roster Tab

The Roster tab allows you to search for agents and offices in the CRMLS Matrix Platform and from all CARETS Member MLSs.

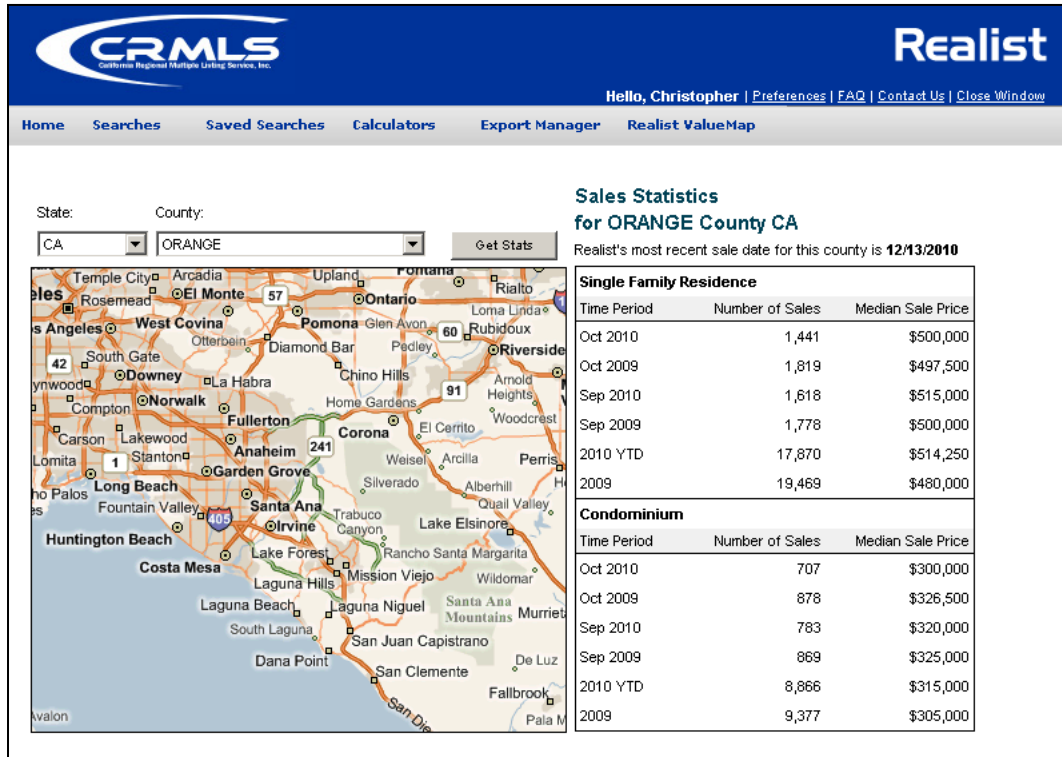


Realist Tax Tab

The Realist Tax tab allows you to access an integrated tax database that combines public records, listing data, maps, and market data in a single research tool.



Realist Tax covers all counties in California and is updated frequently.



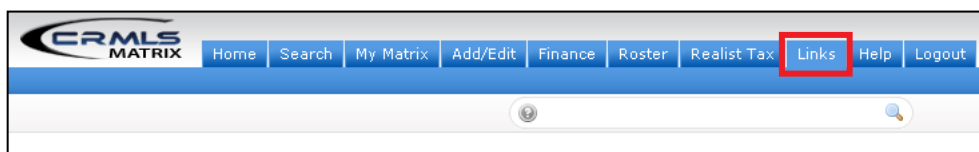
A screenshot of the Realist website interface. The top navigation bar includes the CRMLS logo, the word 'Realist', and user information: 'Hello, Christopher | Preferences | FAQ | Contact Us | Close Window'. Below the navigation bar are tabs for Home, Searches, Saved Searches, Calculators, Export Manager, and Realist ValueMap. The main content area features a map of Orange County, CA, with a dropdown menu for 'State' set to 'CA' and 'County' set to 'ORANGE'. A 'Get Stats' button is visible. To the right of the map, the 'Sales Statistics for ORANGE County CA' are displayed, including the most recent sale date (12/13/2010) and two tables: 'Single Family Residence' and 'Condominium'.

Time Period	Number of Sales	Median Sale Price
Oct 2010	1,441	\$500,000
Oct 2009	1,819	\$497,500
Sep 2010	1,618	\$515,000
Sep 2009	1,778	\$500,000
2010 YTD	17,870	\$514,250
2009	19,469	\$480,000

Time Period	Number of Sales	Median Sale Price
Oct 2010	707	\$300,000
Oct 2009	878	\$326,500
Sep 2010	783	\$320,000
Sep 2009	869	\$325,000
2010 YTD	8,866	\$315,000
2009	9,377	\$305,000

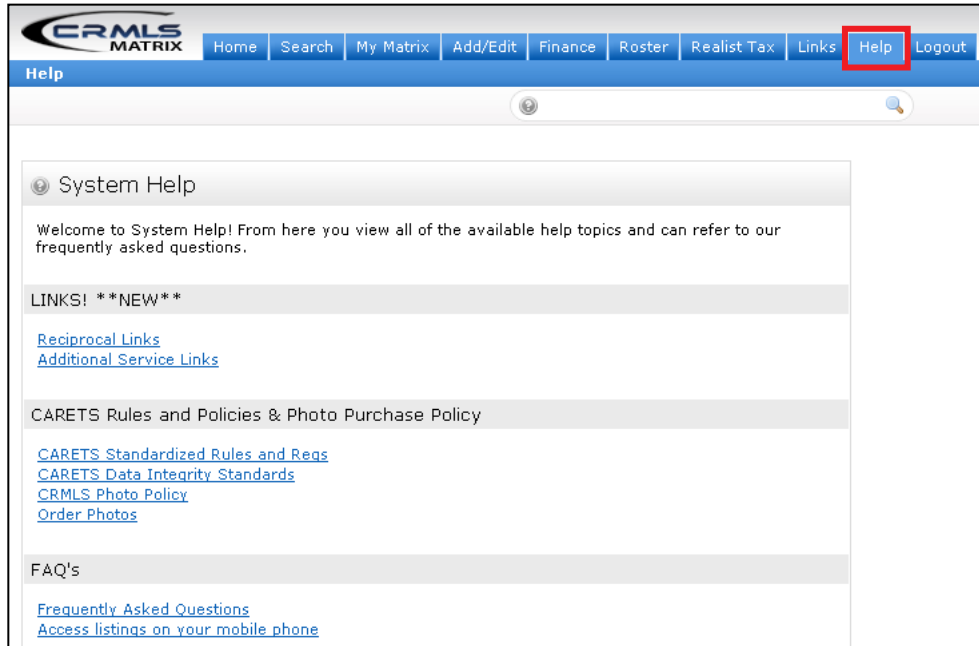
Links Tab

The Links tab allows you to access other CRMLS products and MLS systems, provided by your Local Association/Board of REALTORS®.



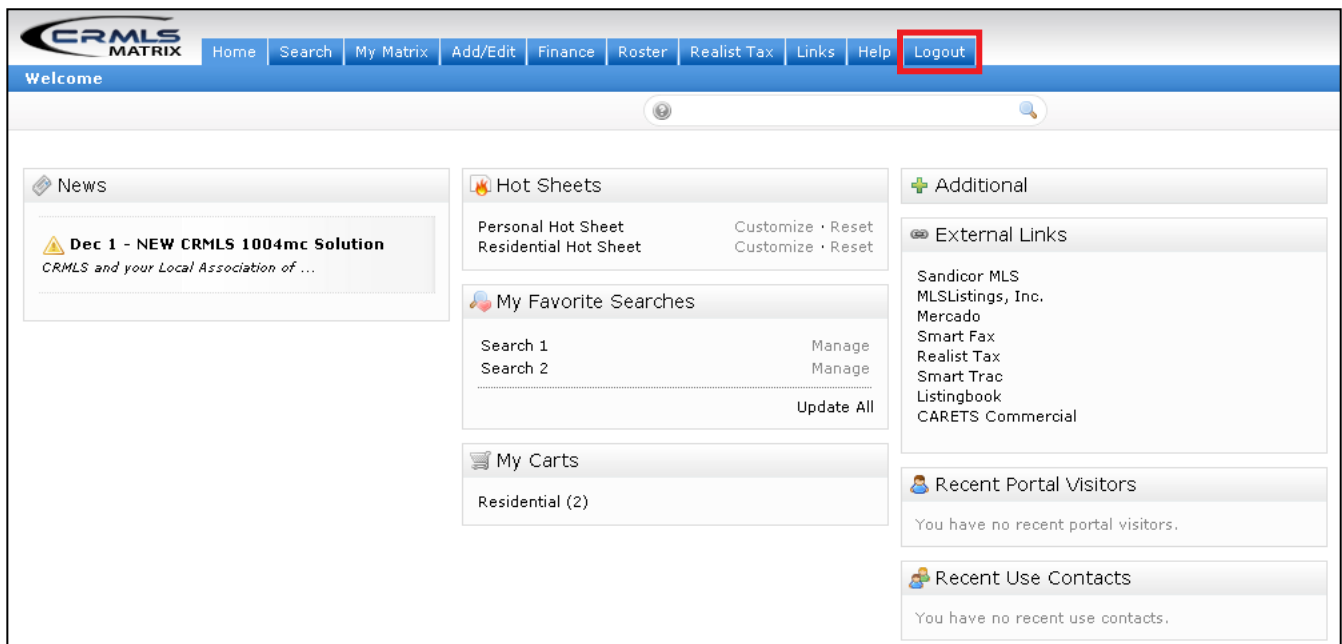
Help Tab

The Help tab contains links to helpful information such as reciprocal links and passwords, CARETS rules and policies, photo purchase policies, frequently asked questions, training classes schedules, CRMLS news, IDX solutions and policy, VOW rules and policy, and the CRMLS download center to obtain Listing Input Forms and the CRMLS 1004MC spreadsheet.



Logout Tab

When you're finished working in the CRMLS Matrix Platform, click the Logout tab to sign out, then close your web browser.



Post Conversion Tasks

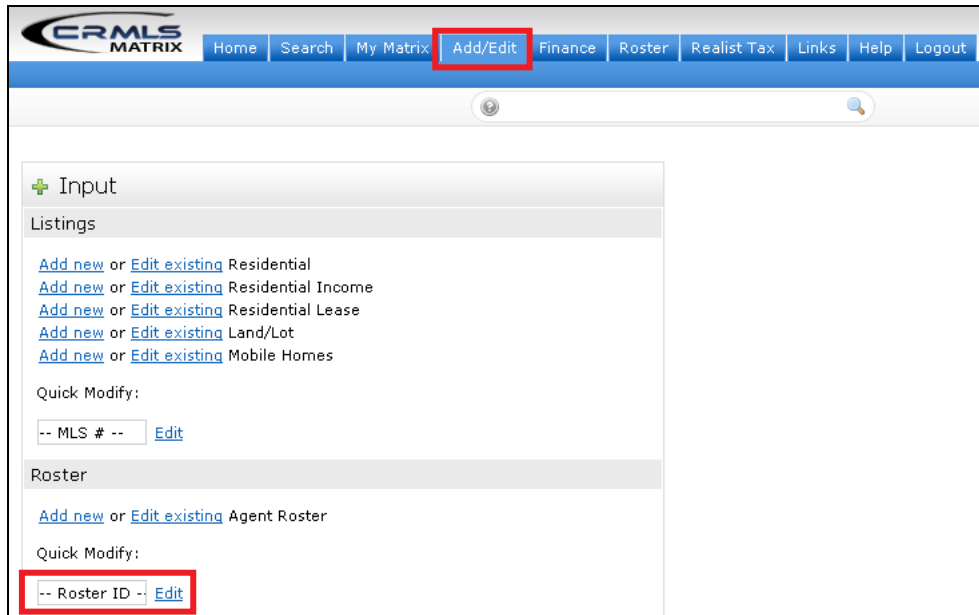
Follow the steps in these sections to verify your contact information, listings, contacts, and saved searches were migrated to the CRMLS Matrix Platform. Once you've verified that your information was transferred over, you can re-enable your auto prospects as necessary.

- “Verify Your Contact Information” on page 13
- “Create an Email Signature” on page 15
- “Create Headers and Footers” on page 16
- “Check your Contacts” on page 19
- “Check Your Listings” on page 20
- “Update Your Listings” on page 23
- “Check Your Saved Searches and Auto Prospects” on page 26
- “Re-enable Auto Prospects (Auto Emails)” on page 27
- “Download the Latest Listing Input Forms” on page 31
- “Download the Latest 1004MC Solution and Manual” on page 31

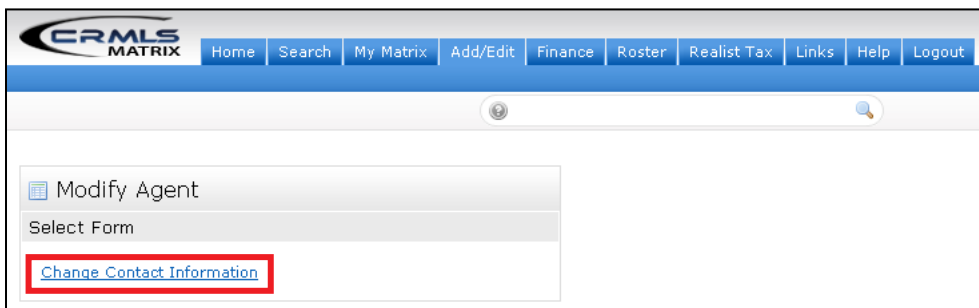
1. Verify Your Contact Information

Your contact information is one of the most valuable pieces of information you can provide to CRMLS members. The CRMLS Matrix Platform also displays your contact information on agent and client reports and displays. Follow the steps below to update your contact information and preferred contact order.

1. Click the **Add/Edit** tab.
2. Under Roster, type your **Public ID** (Discover CA Username) in the **Quick Modify** field, then click **Edit**.



3. Click **Change Contact Information**.



4. Update your contact information and preferred contact order using the available fields.

The screenshot shows the 'Change Contact Information' form in the CRMLS Matrix system. The form is titled 'Change Contact Information' and contains the following sections:

- Contact Information:**
 - PublicID: [field] Name: [field]
 - Direct Office Phone: [field] ext [field]
 - Home Phone: [field] ext [field]
 - Toll Free Phone: [field] ext [field]
 - Voicemail: [field] ext [field]
 - Email: [field]
 - Website URL: [field]
- Cell Phone:** [field]
- Fax:** [field]
- Pager:** [field]
- Preferred Contact Order:**
 - The preferred contact order will control which phone numbers appear in the Roster. You may select up to 6 contact options. Selecting no contact options will leave only your office's phone and fax for other members to see.
 - 1 [field] Agent Cell Ph
 - 2 [field] Agent Direct Ph
 - 3 [field] Agent Pager Ph
 - 4 [field] Agent Fax
 - 5 [field] Agent Voice Mail
 - 6 [field] Agent Email

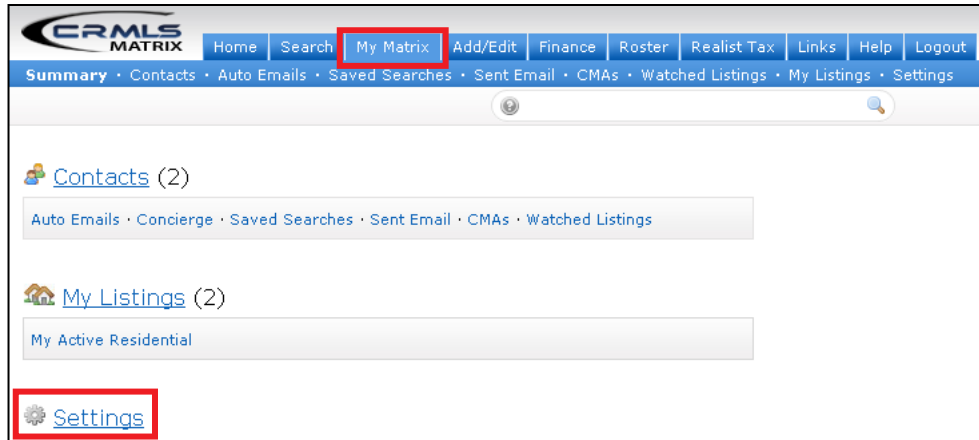
At the bottom of the form, there are two buttons: 'Cancel Input' (with a red X icon) and 'Submit Agent' (with a green checkmark icon).

5. Verify that your Email address is up to date and monitored regularly. The Email address on file is used by the CRMLS Matrix Platform to send you notifications and not having a valid email address on file can lead to poor performance or loss of features.
6. When you're done click **Submit Agent** to save your updated contact information.

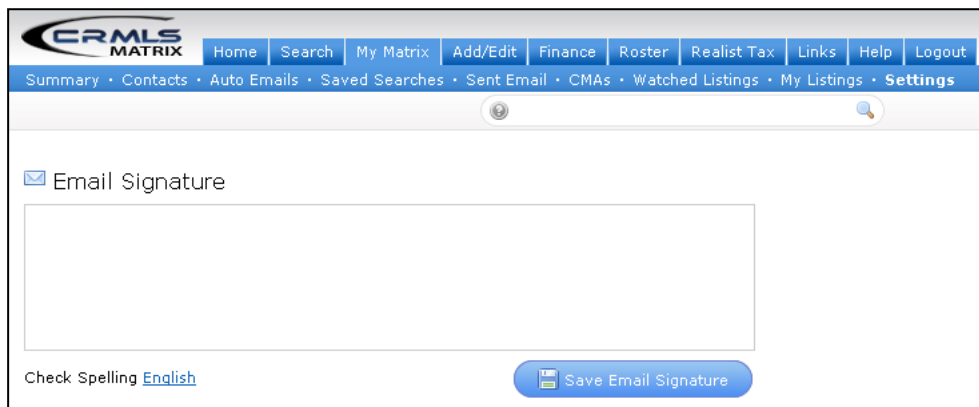
2. Create an Email Signature

When you send an email from the CRMLS Matrix Platform, your email signature will appear at the bottom of the email. Follow the steps below to create an email signature in CRMLS Matrix.

1. Click **Settings** on the My Matrix tab.



2. Enter your Email Signature.

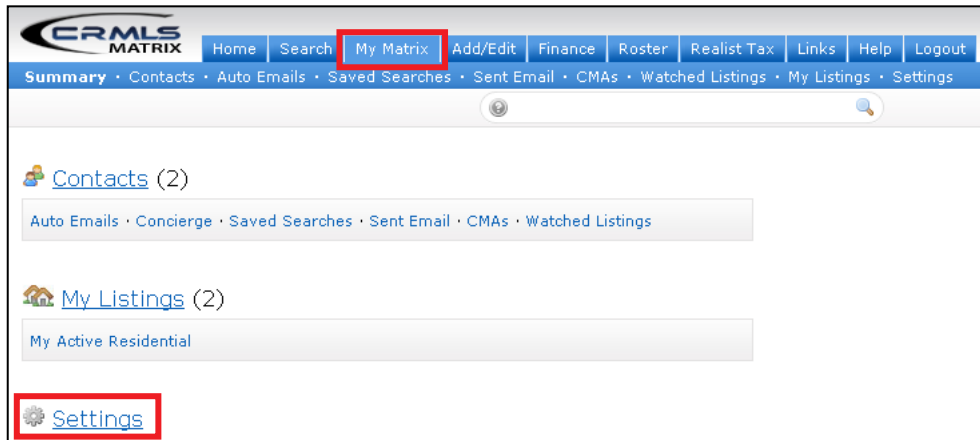


3. Click the **English** Check Spelling link to spell check your email signature.
4. Click **Save Email Signature** when you're done entering your email signature.

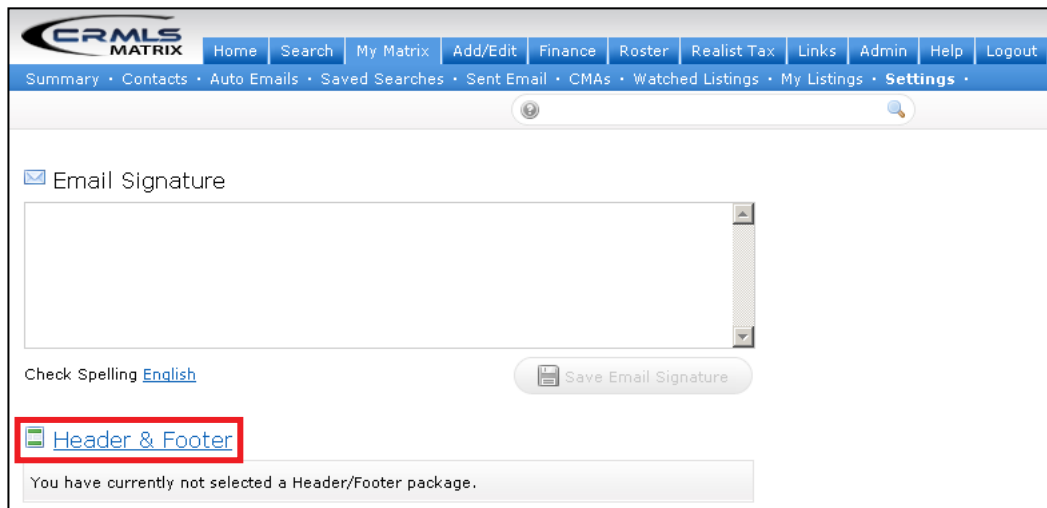
3. Create Headers and Footers

The CRMLS Matrix Platform allows you to create a Header and Footer that's appended to emails and on your printed displays and reports with a custom picture, logo, motto, and personal contact information. Follow the steps below to customize your Header and Footer.

1. Click the **Settings** link on the My Matrix tab.



2. Click the **Header & Footer** link.



3. Select one of the Available Header/Footer Packages.

CRMLS MATRIX Home Search My Matrix Add/Edit Finance Roster Realist Tax Links Admin Help Logout

Summary • Contacts • Auto Emails • Saved Searches • Sent Email • CMAs • Watched Listings • My Listings • Settings •

Available Header/Footer Packages

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

Lighthouse

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
DRE License: 1234567

Lighthouse - No Photo

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
DRE License: 1234567

Note:

If you don't want to include your photo in the header/footer, select one of the **No Photo** headers/footers.

4. Click the **Next: Set my Information** button when you're done selecting a header/footer package.
5. Scroll down to the Details section and click the **Click here to prefill your details** link to pre-fill your contact information from the Matrix roster or manually enter you contact information.

The information you enter will be displayed on all of your client portal and report headers and footers.

Print Header

Agent Name
Office Name

Office: 909-555-1212
Fax: 909-555-1212
DRE License: 11111111

Details

Fill in your details below that you wish to be displayed in your header/footer.
Some of the fields may appear on both the header and footer.
[Click here to prefill your details based on your agent roster information.](#)
Click the Preview button to see what your information will look like in the header and/or footer.

First Name:

Last Name:

Public Email Address:

Title of Employment:

Cell Phone Number:

Agency/Office:

Office Phone Number:

Office Fax Number:

Tag Line: (i.e., Slogan)

DRE License Number:

Your Photo

To upload your photo, click the Browse button and choose the image file to upload.
Optimal Image Size: **66 x 79** pixels.

Your Photo file location:

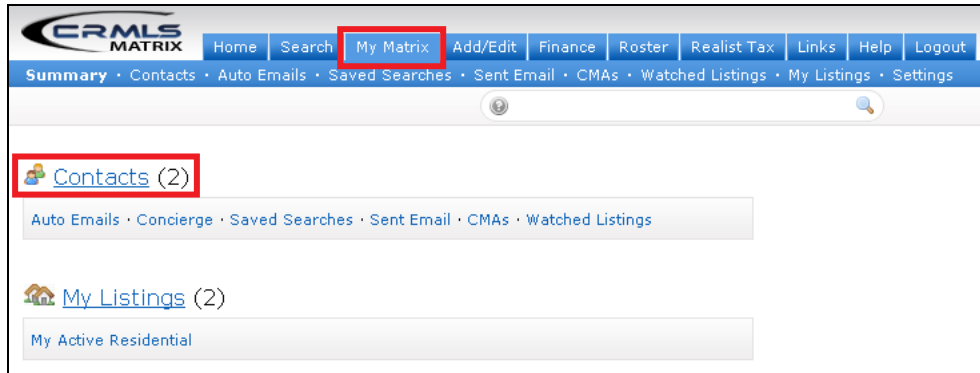
Click the Preview button to view your complete package prior to saving.
Please wait until all images have been loaded before clicking the Save button.
Note: If you have previously uploaded images for a custom header/footer, saving this

6. If you selected a header/footer that allows you to include your photo, click the **Browse** button.
7. Locate and select the photo you want to upload.
8. Click the **Preview** button to preview your header and footer.
9. Click the **Save** button to save your header and footer.

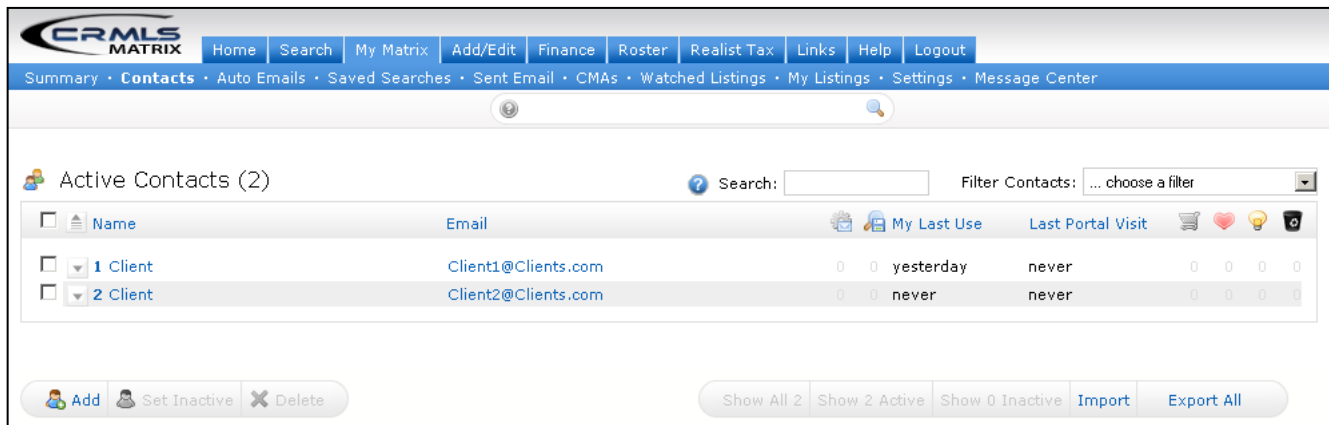
4. Check your Contacts

Follow the steps below to verify that all of your contacts were migrated to the CRMLS Matrix Platform.

1. Click the **Contacts** link on the **My Matrix** tab.



2. Verify that all of your contacts were migrated. To sort your contacts alphabetically, click the **Name** link. To search for a contact, type a name in the **Search** field.



Note:

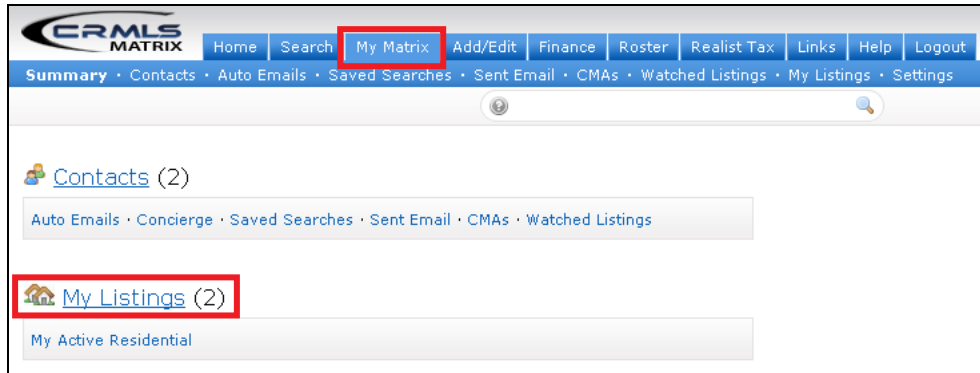
Contacts that did not contain a first name or last name were not migrated to the CRMLS Matrix Platform. If any of your contacts were missing an email address, the client's email address field was populated with your email address.

If you're missing any contacts, contact the CRMLS support department as described on page 51.

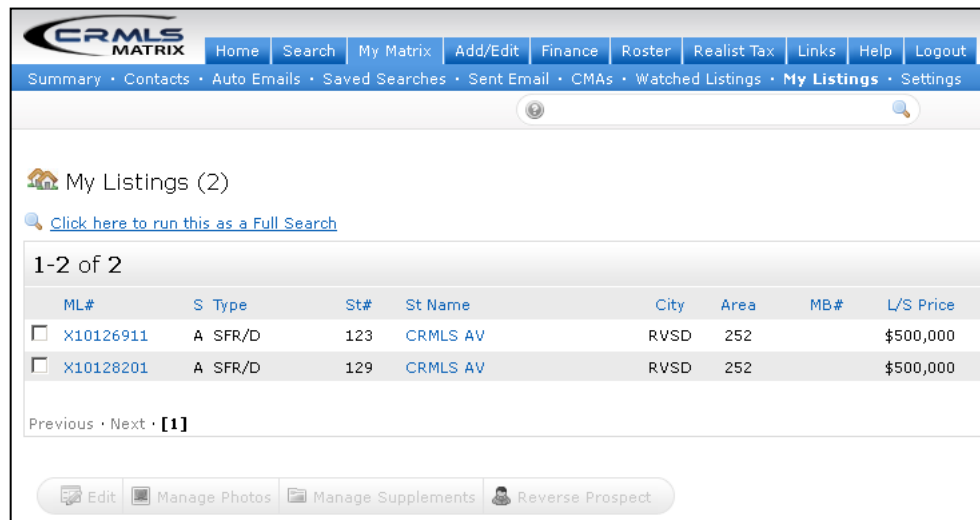
5. Check Your Listings

Follow the steps below to verify that all of your listings were migrated to the CRMLS Matrix Platform.

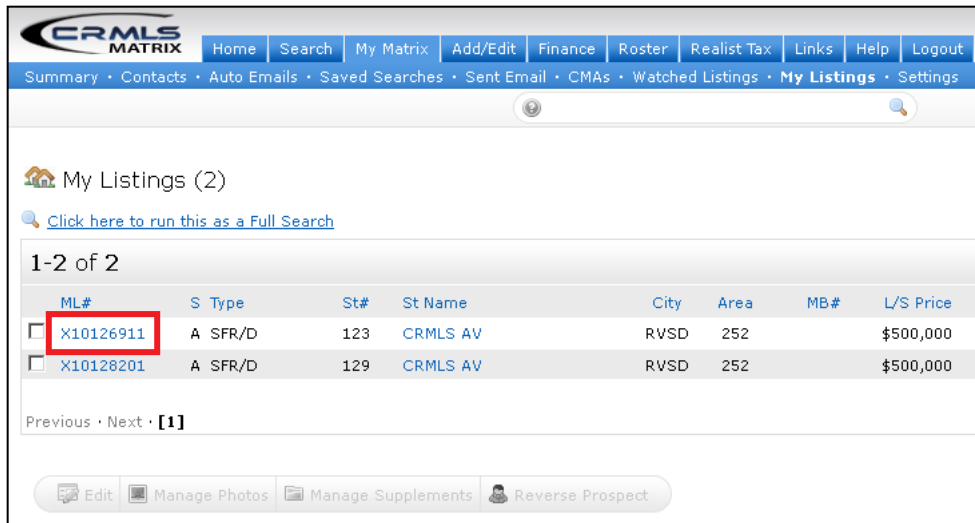
1. Click the **My Listings** link on the **My Matrix** tab.



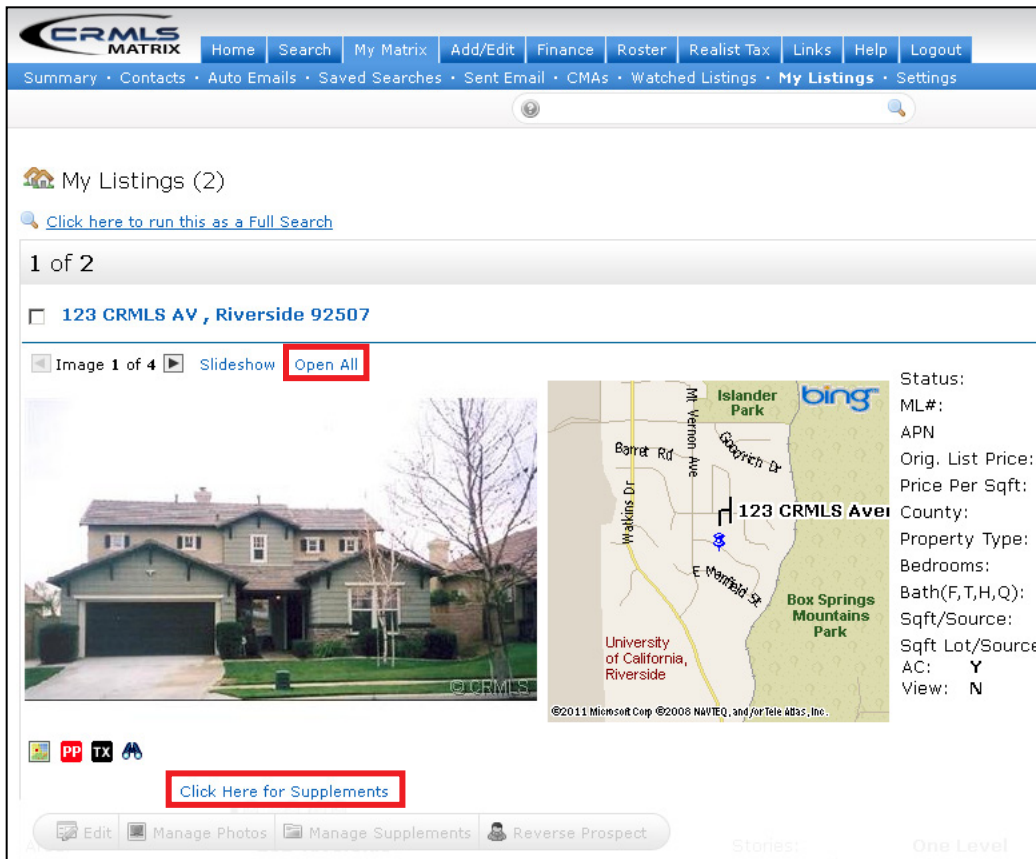
2. Verify that all of your listings were migrated to the CRMLS Matrix Platform. If you have multiple listings you may need to click the **Next** link at the bottom of the list to move to subsequent pages of listings.



- Once you've verified that all of your listings have been migrated, click the **ML#** link for first listing in the list.



- Click the **Open all** link above the primary listing photo and verify that all of the listing's photos were migrated.
- If your listing contained supplements, click the **Click Here for Supplements** link and verify that all of the listing's supplements were migrated.



6. Scroll down the page and check all of the listing's details and verify that they are correct. If any of your listings have incorrect information, make a note of it.

Note:

Depending on the length of the fields in your previous MLS and the CRMLS Matrix Platform, it is possible that some fields may be truncated. If you don't see a field that was included in your previous MLS, check the Property Description and Agent Remarks fields.

7. Click the **Next** link at the bottom of the listing to move to the next listing.

<u>Lease/Fees</u>		<u>School Information</u>	
Land Fee/Lease:	Fee	Date of Land Lease Renew:	School District:
Land Lease Amount:			Elementary School:
Land Transfer Fee:			Junior High School:
Land Lease Purchase:			High School:
<u>Terms</u>			
Possession:		Listing Terms:	Submit
<u>Office/MLS</u>			
S.O. Compensation:	3.000%	Showing Instructions:	Appointment Only
S.O.C. Remarks:		Key Safe Description:	
Dual Variable Rate of Com:	No	Key Safe Location:	Front Door
Sign On Property			
Listing Office: (MRML)	CRMLS	Listing Office Ph:	909-859-2040
Listing Agent: ()		Listing Office Fax:	909-859-2050
LA DRE:	123123123	List Type:	Exclusive Right To Sell
Co-Listing Agent: ()		Service Type:	Full Service
Co LA DRE:		Listing Paid:	
Date Of Listing:	12/08/2010	Ad Number:	
Date Modified:	06/06/2011	Internet, Send?/Address?:	Yes/Yes
Date of Expiration:	06/08/2014	VOW, AVM?/Comm?:	Yes/Yes
Agent Remarks:			
If you believe there is a violation on this listing, click here to report the problem.			
Agent Full Single - Residential		ML#: X10126911	
Previous	Next	[1] 2	
Edit Manage Photos Manage Supplements Reverse Prospect			

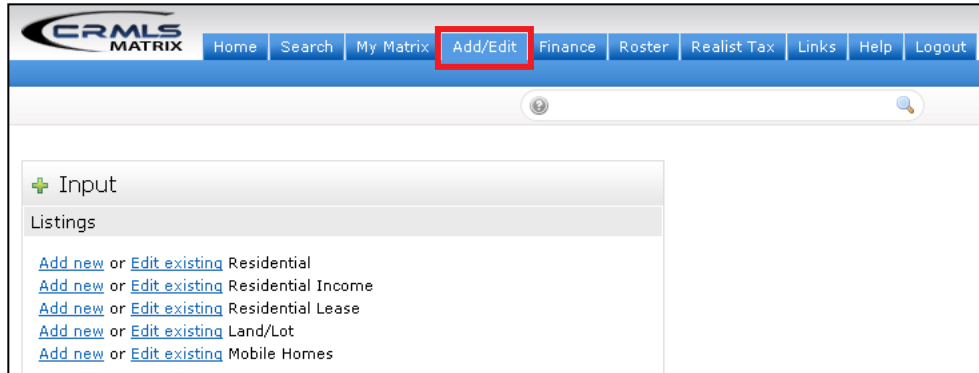
8. Repeat steps 4 through 7 to verify the rest of your listing.

If you're missing listings or notice any problems with your listings, contact the CRMLS support department as described on page 51.

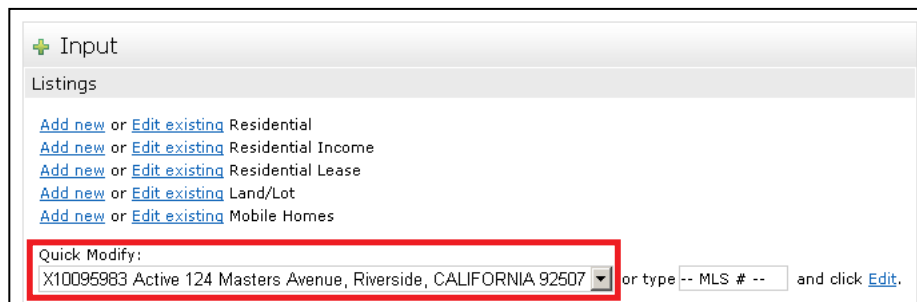
6. Update Your Listings

Some fields that weren't required or that didn't exist in Discover CA are now required fields in the CRMLS Matrix Platform. To avoid potential violations, you will need to update all of your listings and fill out all newly required fields. Follow the steps below to update your listings.

1. Click the **Add/Edit** tab.



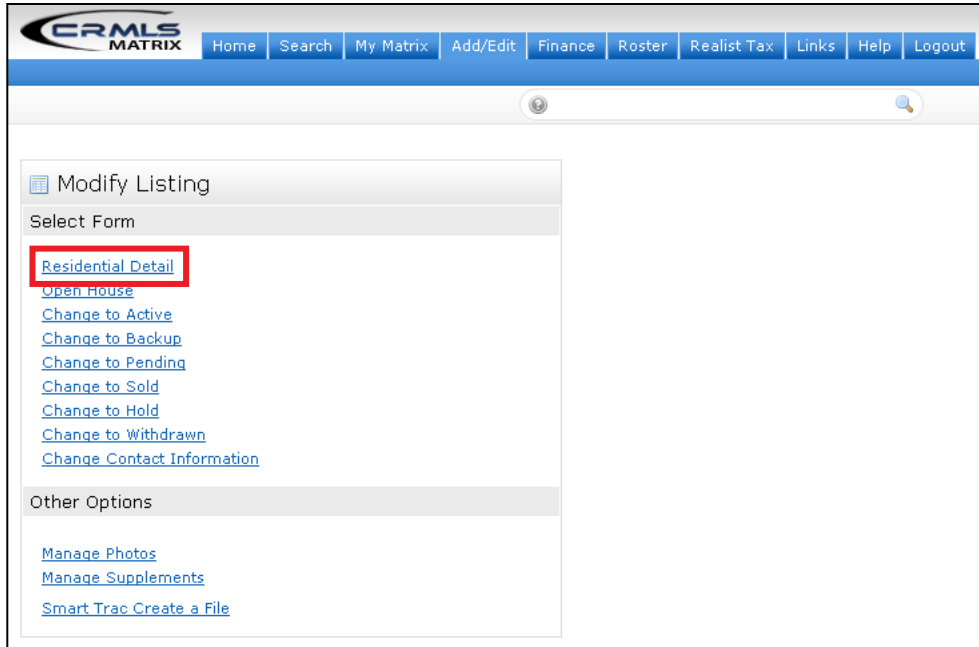
2. Select the first listing you want to modify in the Quick Modify drop-down menu.



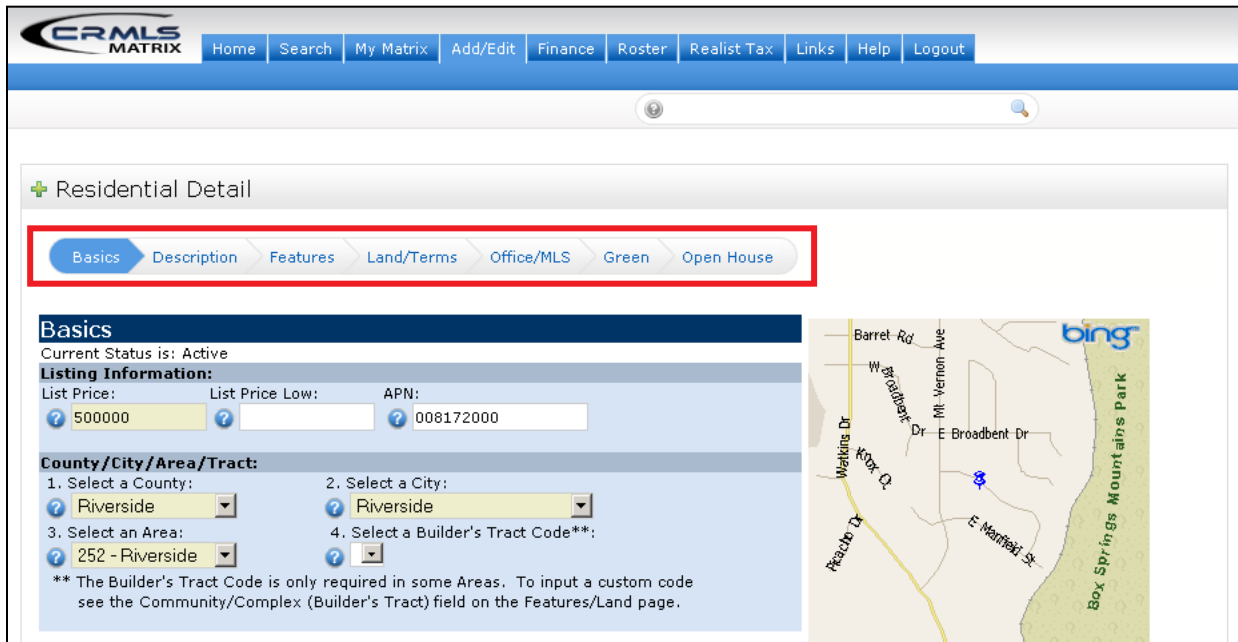
Note:

You can also type the Multiple Listing Number in the ML# field and click **Edit**.

3. Click the **Detail** link on the Modify Listing screen. You see the Listing Input Wizard.



4. Click the tabs to move through each section of the Listing Input Wizard and make changes to your listing as necessary.



All fields highlighted in yellow are required and must be filled out before you can submit your listing.

Note:

Area information is currently not available for Amador, Chico, Oroville, Paradise, Madera, Mariposa, Merced, Tehama, and Yosemite Gateway.

5. When you're done modifying your listing, click **Submit Listing** to save your changes.

Basic Information:

Property Type: Single Family Residence Attached Structure: Detached Year Built: 1965 Year Built Src: Sale Type: Standard

Bedrooms: 4 Baths: Full: 2 Baths: 3/4: Baths: 1/2: Baths: 1/4:

Sqft. Structure: 1775 Source: Assessor's Data Sqft. Lot: 13504 Source: Assessor's Data Entry Location: Ground Level With Steps

BasementSqft: Senior Community: No Association Y/N: No Lease Considered: No Stories: One Level

Preview Cancel Input **Submit Listing**

If any required fields are missing information or if the listing contains warnings or errors, the **✖** error or **⚠** warning symbol will appear next to each section and field that needs to be updated. Click the tab with the error or warning and make corrections as necessary. All errors must be corrected before the listing can be submitted.

+ Residential Detail

Basics Description **✖ Features** ✖ Land/Terms Office/MLS Open House

If you have one or more Open House Events planned, you may enter them here. Select "More" to add an Open House. Select "Delete" to Remove one. Warning: Delete can If you do not have an open house, leave this page unchanged and an open house will not be entered into the system.

Showing Agent ID: xchrisag Find Date: 12/18/201 Time: 10:00 AM to 04:00 PM

Type: Public Attended: Attended Refreshments: Drawing: Delete More

Comments: Check Spelling

[There were errors on the input form, click here to view them.](#)

Save to Partially Completed Listings Preview Cancel Input **Submit Listing**

6. Repeat steps 1 through 5 to update the rest of your listings.

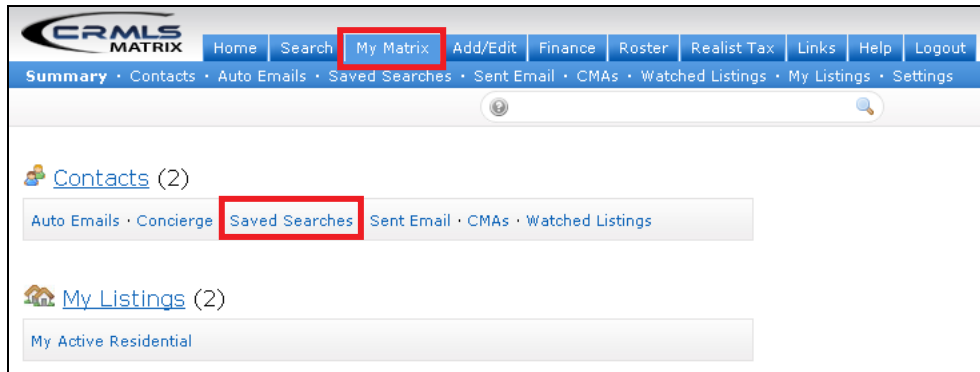
7. Check Your Saved Searches and Auto Prospects

Saved Searches and Auto Prospects from Discover CA were migrated to the CRMLS Matrix Platform as Saved Searches. Follow the steps below to verify that your Saved Searches and Auto Prospects were migrated to the CRMLS Matrix Platform.

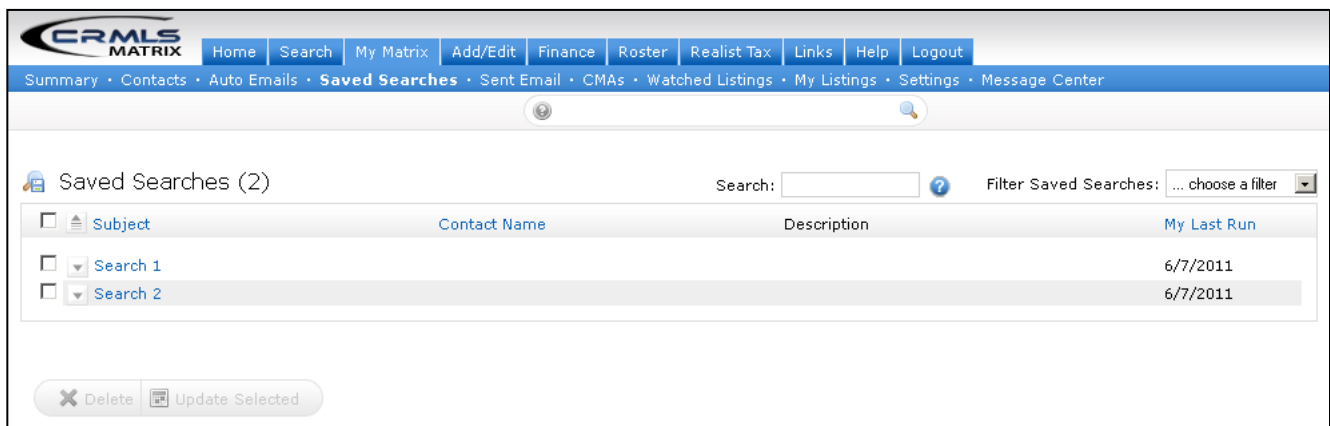
Note:

Auto Prospects that were migrated to the CRMLS Matrix Platform have been disabled. To re-enable your Auto Prospects, refer to “Re-enable Auto Prospects (Auto Emails)” on page 27.

1. Click the **Saved Searches** link on the **My Matrix** tab.



2. Verify that your saved searches were migrated.



Note:

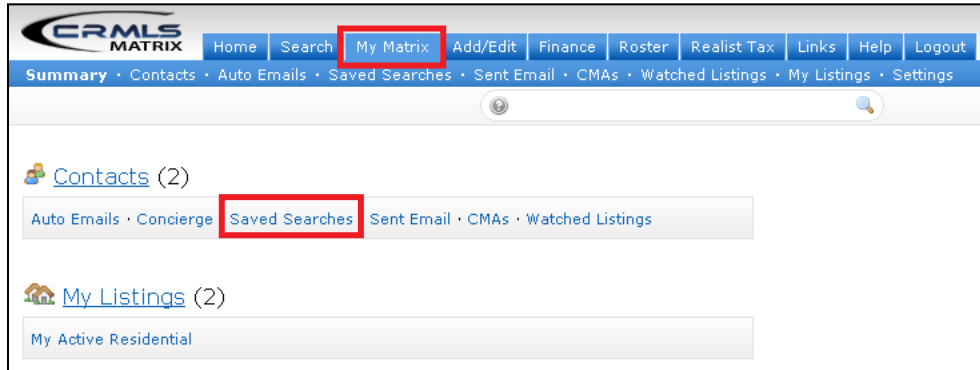
Due some carryover of pre-Discover CA search criteria, a small number of Saved Searches and Auto Prospects were not able to be migrated to the CRMLS Matrix Platform.

If you're missing any Saved Searches or Auto Prospects, contact the CRMLS support department as described on page 51.

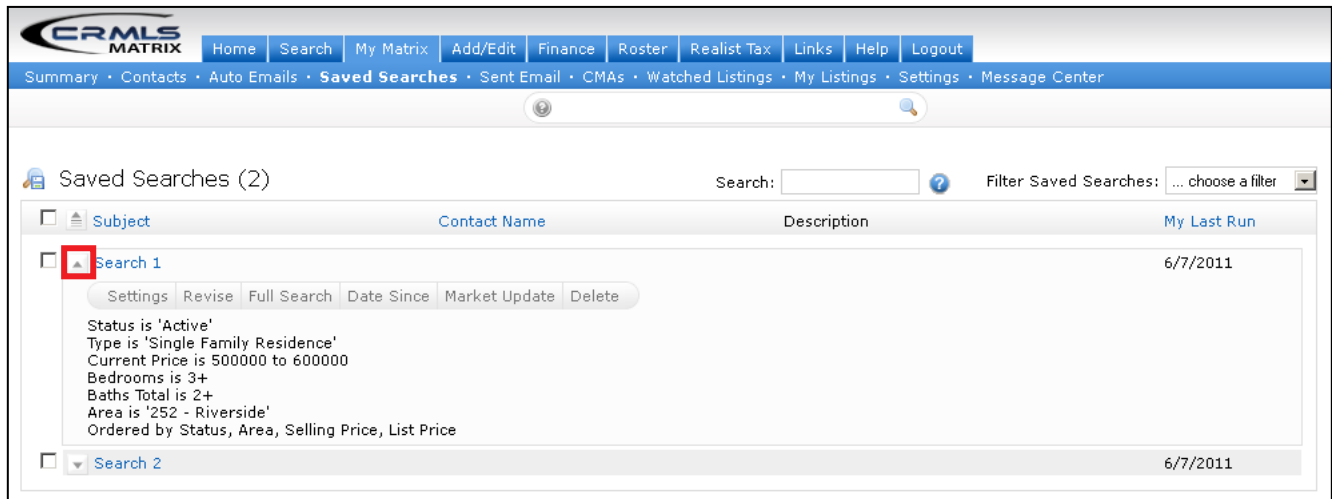
8. Re-enable Auto Prospects (Auto Emails)

Auto Prospects from Discover CA are equivalent to the CRMLS Matrix Platform's Auto Email feature. Auto Prospects were migrated to the CRMLS Matrix Platform as Saved Searches. Follow the steps below to turn your Saved Searches into Auto Emails for your clients.

1. Click the **Saved Searches** link on the **My Matrix** tab.



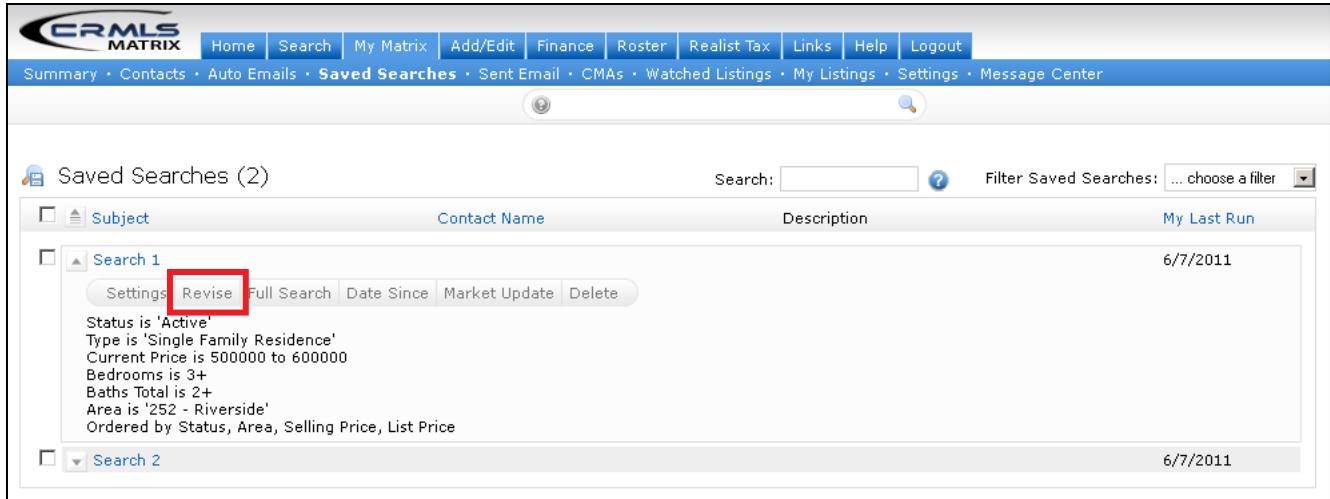
2. Locate the Saved Search you want to turn into an Auto Email notification.
3. Click the triangle next to the Saved Search to display the Saved Search options.



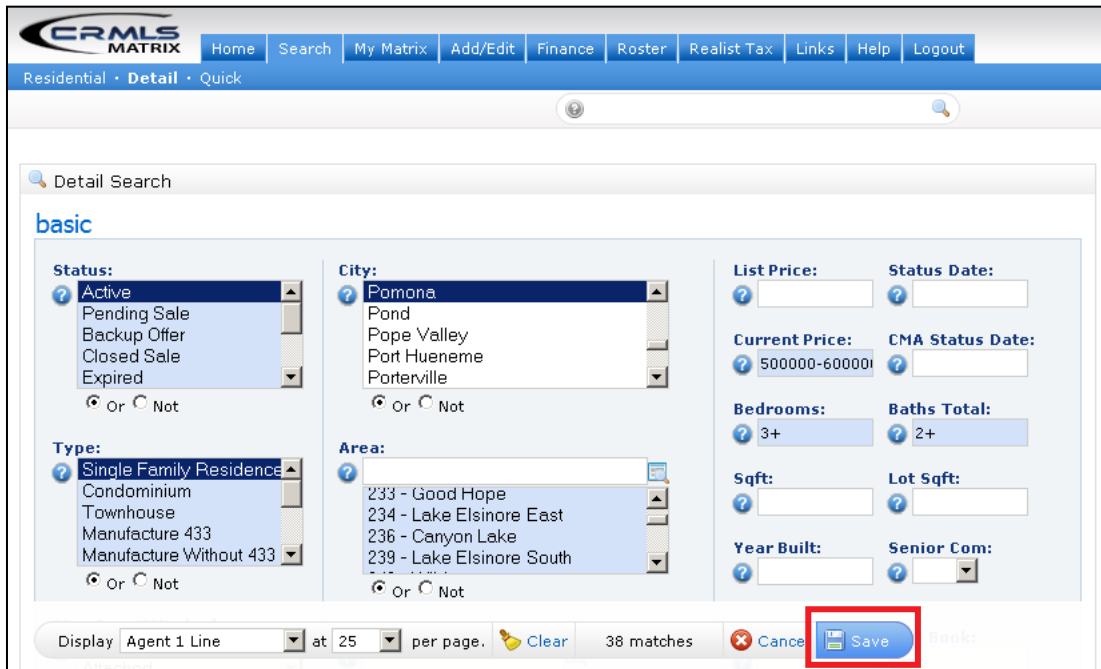
Note:

*If you have a large number of Saved Searches, you can filter them using the **Filter Saved Searches** drop-down menu.*

4. Click **Revise** to update your Saved Search criteria before turning it into an auto email.



5. Review and modify your search criteria as necessary, then click **Save**.



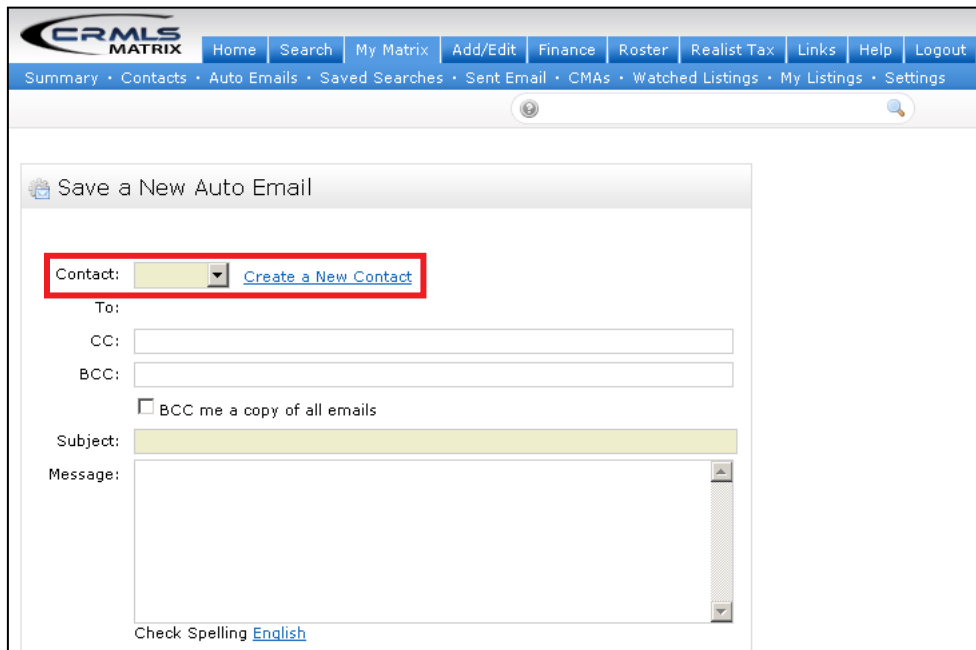
Note:

Saved Searches that return more than 250 listings cannot be turned into an Auto Email.

6. Click the **Turn this Saved Search into an Auto Email** link.



7. Select a contact from the **Contact** drop-down list to assign the auto email to an existing contact. To add a new contact, click the **Create a New Contact** link, then see follow the prompts on the screen.



8. Enter a subject for the email in the **Subject** field.

9. Select **BCC me a copy of all emails** to receive a blind carbon copy of auto emails sent to the client.

10. If you want to send the auto email to an additional email address, the address in the **CC:** field.

11. If you want to send the auto email to an additional email address without the client seeing who it was sent to, enter the address in the **BCC:** field.
12. CRMLS Matrix will automatically populate the message field. If you want to add a personal message before the auto populated text, enter it in the **Message** field.

Note:

When sending the initial auto email to a client, you should leave the Message field blank. This will send out a message welcoming your client to the Portal and provide them with general information on how to work with the Portal.

13. Select **Make available for Reverse Prospecting** to allow a listing agent to see if their listing was sent in an auto email.

The screenshot shows a 'Settings' dialog box with the following options:

- Enable concierge mode
- Make available for Reverse Prospecting** (highlighted with a red box)
- Enable as a Favorite Search on Home tab (12 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 checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

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

Note:

Client information is never shared with Listing Agents when Reverse Prospecting is enabled.

14. Select **Enable as a Favorite Search** to add the search to the Favorite Searches widget on the CRMLS Matrix Home tab.
15. Select a Schedule setting to specify when auto emails are sent to your client. The **Daily** setting allows to send emails every day at 8:00AM or 6:00PM, the **ASAP** setting sends auto emails as soon as possible, and the **Monthly** setting sends emails at midnight on the first of the month.
16. Click the **Save** button to save your Auto Email.

Note:

If your Auto Email returns more than 250 listings, you will receive a message letting you know that your Auto Email has been disabled. To reactivate your auto email, access your Saved Search in the My Matrix tab, narrow your search criteria, and re-activate the Auto Email. If necessary, you can set up multiple saved searches for a single client.

9. Download the Latest Listing Input Forms

Before you add or modify listings, be sure to download the new Listing Input Forms from http://www.crmls.org/centsite/listing_input_forms.htm.

10. Download the Latest 1004MC Solution and Manual

Before generating a 1004MC report, download the latest versions of the CRMLS [1004MC Solution](#) and [1004MC Solution Manual](#) from the **Download Center** on the CRMLS Matrix Platform's **Help** tab. The 1004MC Solution Manual contains complete details on exporting comps from the CRMLS Matrix Platform and using the CRMLS 1004MC Solution spreadsheet.

Searching for Listings

Refer to the following sections to search for listings in the CRMLS Matrix Platform.

- “Basic Search” below
- “Map Search” on page 36
- “Viewing Search Results” on page 40

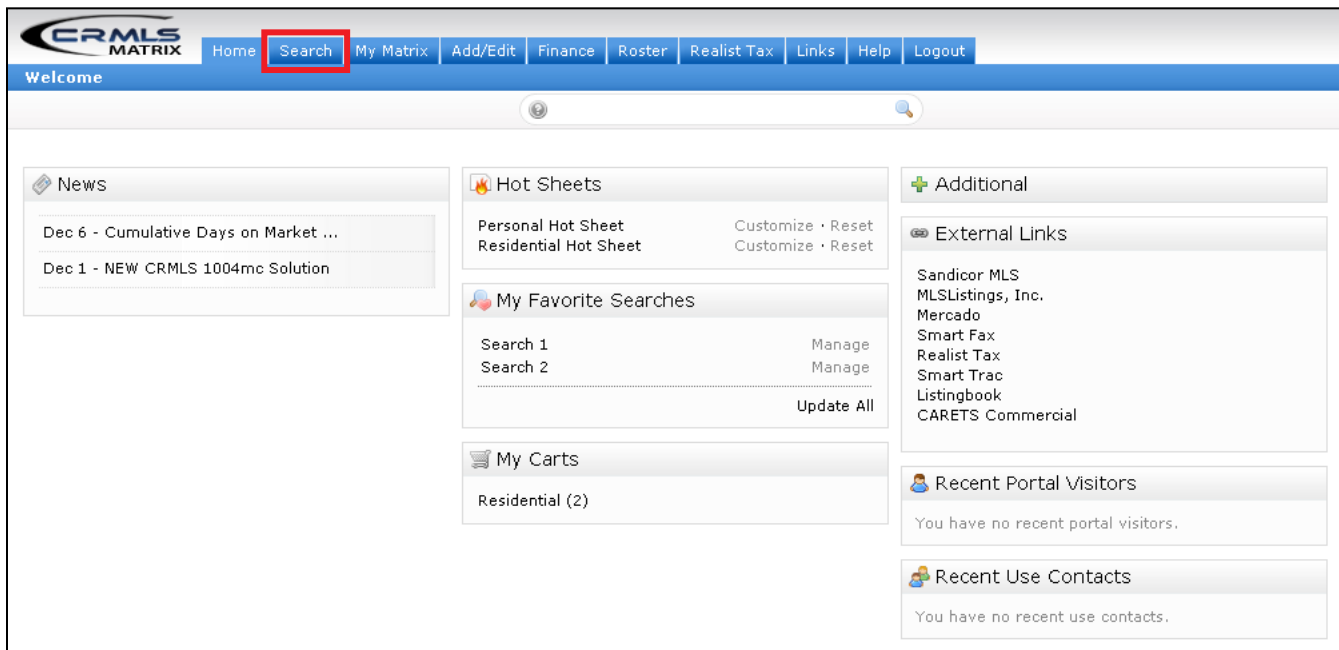
Note:

To search for Commercial/Industrial properties, Commercial Leases, or Business Opportunities, use the CARETS Commercial system instead. To access CARETS Commercial, click the **CARETS Commercial** link on the Links tab of the CRMLS Matrix Platform.

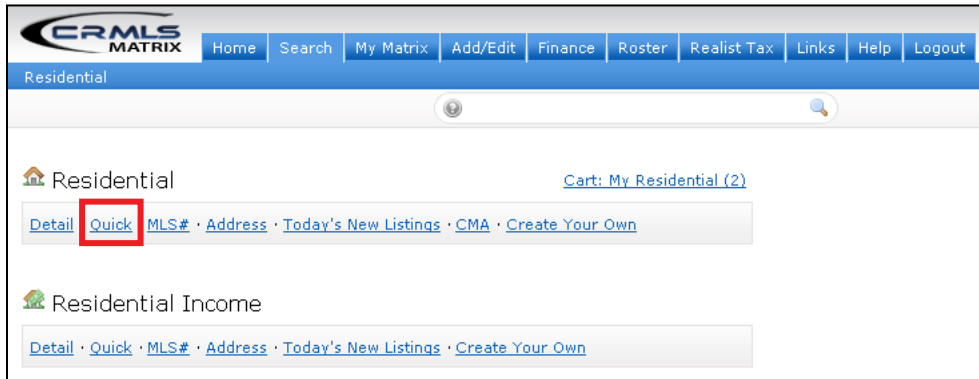
Basic Search

Follow the steps below to perform a basic search. This example will guide you through performing a basic Residential search, however, the steps for performing a basic Residential Income, Residential Lease, Land/Lot, or Mobile Home search are similar.

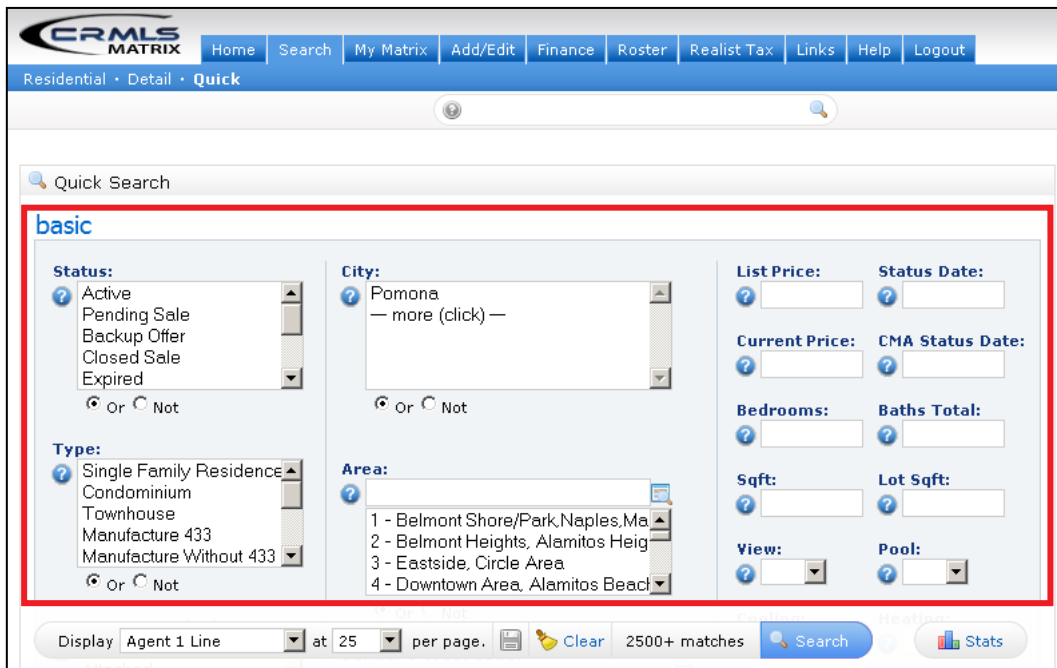
1. Click the **Search** tab.



- Click any of the search links for the type of property you're searching for. In this example, we will be performing a **Quick Residential** search.



- Enter your search criteria. To select more than one item in a field, hold the **CTRL** key on your keyboard while clicking the desired items. To deselect an item, hold the **CTRL** key on your keyboard and click the item you want to remove.



Note:

If you need help entering search criteria, click the ? icon next to the field you need help with. For a list of special characters allowed for search fields, See "Additional Search Options" on page 35.

Area information is currently not available for Amador, Chico, Oroville, Paradise, Madera, Mariposa, Merced, Tehama, and Yosemite Gateway.


- Select a search results display format from the **Display** drop-down box. For example, to display search results as thumbnails, select **Agent Thumbnail**.

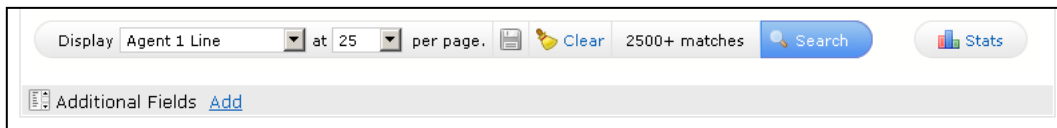


5. Select the number of listings you want the search results to display per page. Available options are 10, 25, 50, or 100 listings per page.

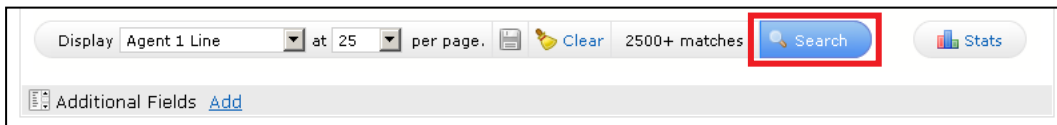


6. You can also do the following:

- Click **Clear** to remove all your search criteria and start over.
- Click the  button to save your current criteria as your default search settings. To reset the criteria, click the **Clear** button.
- View the number of listings that match your search criteria on the **matches** button.
- Click the **matches** button to view your search criteria before searching.
- Click **Add** to add additional search fields or remove search fields from the search page.
- Click **Stats** to generate statistical charts and graphs for listings that match your search criteria.



7. Click the **Search** button, then continue with “Viewing Search Results” on page 40.



Additional Search Options

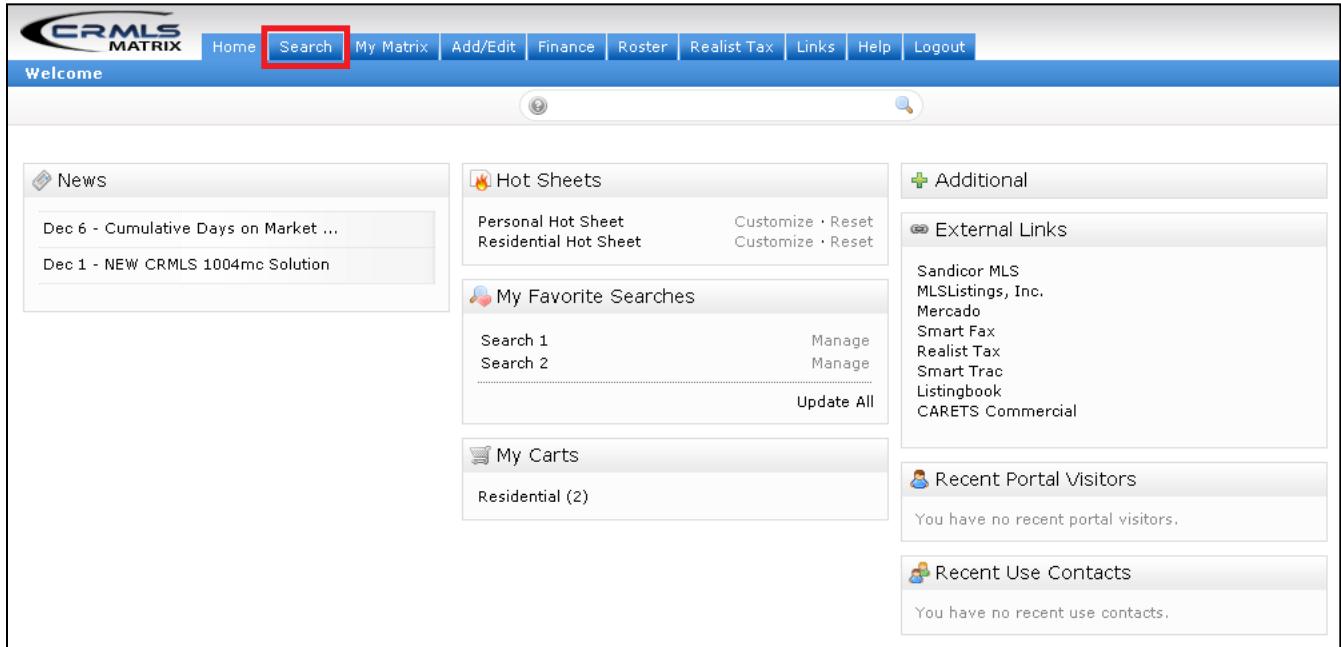
Refer to the table below for a list of special characters allowed for search fields.

Special Character	Description	Example
+	Greater than or equal to: Allows you to search for values that are greater than or equal to the value you entered. When using the + character, it must follow the value you enter.	<i>Bathrooms: 3+</i> Finds all listings that have 3 or more bathrooms.
-	Less than or equal to: Allows you to search for values that are less than or equal to the value you entered. When using the - character, it must follow the value you enter.	<i>Bathrooms: 4-</i> Finds all listings that have 4 bathrooms or less.
-	Range: Allows you specify a numeric range.	<i>List Price: 150000-200000</i> Finds all listings with a list price ranging from \$150,000 to \$200,000.
,	Either/Or: Allows you to enter multiple values in a single field.	<i>Type: SFR, CONDO</i> Finds all listings that are condominiums or single-family residences.
*	Wildcard: Allows you to search for unknown letters and/or numbers.	<i>Street Name: *Park</i> Finds all listings that are located on a street that ends with the word Park. <i>Street name Park*</i> Finds all listings that are located on a street that begins with the word Park. <i>Property Description/Office Comments: *key word*</i> Finds all listings with the “key word” in the property description or office comments. Use commas to separate multiple key words.
!	Exclude Selections: Allows you to exclude listings that contain a specific value for search criteria. When using the ! character, it must precede the value you enter.	<i>Year Built: !1960</i> Excludes all listings that contain properties that were built in 1960. <i>Agent Remarks: !*fixer*</i> Excludes all listings that contain the word fixer in the Agent Remarks field.

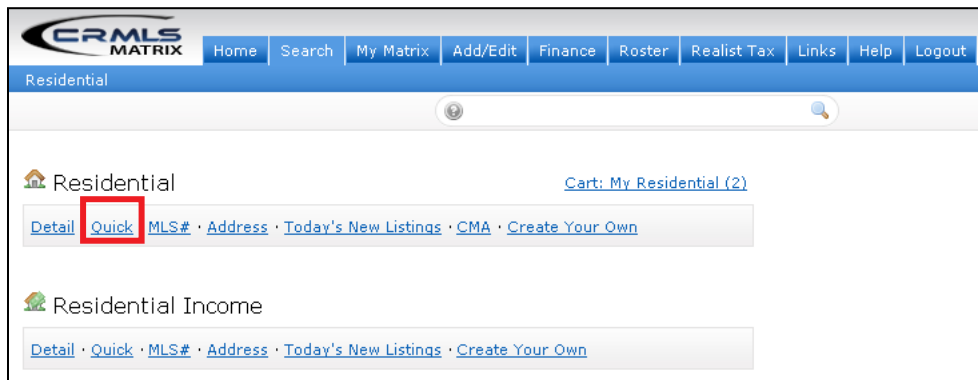
Map Search

The CRMLS Matrix Platform allows you to include and exclude specific areas you want to search by drawing shapes on a map. Follow the steps below to search for properties within a selected area on a map.

1. Click the **Search** tab.



2. Click any of the search links for the type of property you're searching for. In this example, we will be performing a **Quick Residential** search.



3. Click **Map Search**.

basic

Status: Active Pending Sale Backup Offer Closed Sale Expired Or Not	City: Pomona — more (click) — Or Not	List Price: ? Status Date: ?
Type: Single Family Residence Condominium Townhouse Manufacture 433 Manufacture Without 433 Or Not	Area: 1 - Belmont Shore/Park,Naples,Ma 2 - Belmont Heights, Alamitos Heig 3 - Eastside, Circle Area 4 - Downtown Area, Alamitos Beach Or Not	Current Price: ? CMA Status Date: ?
Structure Attached: Detached Attached Or Not	Builder's Tract Code: ?	Bedrooms: ? Baths Total: ?
Property Description: ?	Zip: ? MB#: ?	Sqft: ? Lot Sqft: ?
Agent Remarks: ?	Street #: ? Street Name: ?	View: ? Pool: ?
	Map Search: No Map Selected	Cooling: ? Heating: ?
	APN: ?	Fireplace: ? Parking: ?
		Patio: ? Laundry: ?
		Spa: ? Senior: ?
		Appliances: ? Sprinklers: ?

4. When you see the map screen, define the area your want to search using the **Jump to** drop-down menu or the **Locate Address** fields, then click the **Locate** button.

Map search interface showing a map of the Los Angeles area. The interface includes a map view with navigation controls (compass, zoom, pan) and a search panel on the right. The search panel contains the following elements:

- Jump to:** A dropdown menu with a red border.
- Locate Address:** Fields for Street Address, City, State, and Zip, with a red border.
- Locate:** A button with a red border.
- Mark Search Region:** Links for Draw Rectangle, Draw Radius, and Draw Polygon.
- Map Search Tips:** Instructions on how to use the search tools.
- Other tips:** Instructions on how to clear the map or exclude areas.
- Buttons:** Cancel and OK buttons at the bottom.

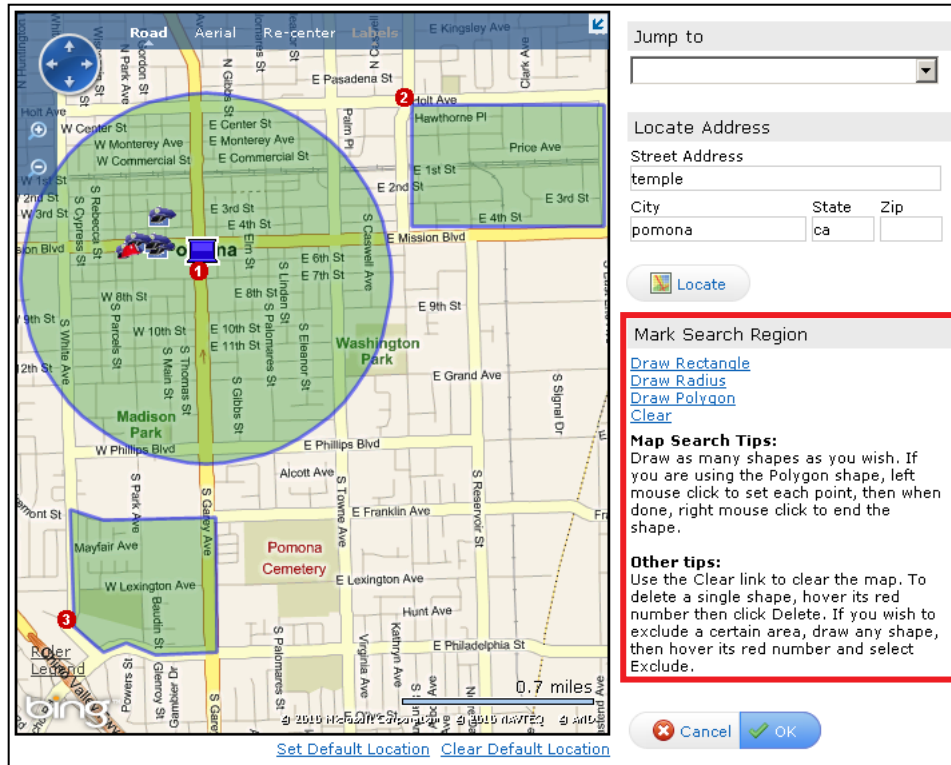
Note:

To set the map to always open to the selected area, click **Set Default Location**. If you want to reset the map to open to its default location, click **Clear Default Location**.

5. Use the Mark Search Region tools to draw multiple shapes that specify the areas you want to search.

To draw a Rectangle or Radius, click and drag your mouse across the map to define your search area.

To draw a Polygon, left-click each point of the area you want to search, then right-click the last point to finish drawing the polygon.



Note:

To exclude a certain area from your search, hover over the shape's red number and select **Exclude this selection**. The shape turns from green to red to indicate that the selected area will be excluded from your search.

To delete a shape, hover over the shape's red number and select **Delete selection**. To delete all of the search areas and start over, click the **Clear** link under Mark Search Region.

To re-center the map to the search area you selected, click the **Re-center** button.

6. Click **OK** to save the search area.

Note:

You must define a search area using one of the drawing tools in order to save the search area.

You see the search screen with a **Map Area Selected** message.

The screenshot shows a search form with the following sections:

- Status:** Active, Pending Sale, Backup Offer, Closed Sale, Expired. Radio buttons for "Or Not".
- Type:** Single Family Residence, Condominium, Townhouse, Manufacture 433, Manufacture Without 433. Radio buttons for "Or Not".
- Structure Attached:** Detached, Attached. Radio buttons for "Or Not".
- Property Description:** Text input field.
- Agent Remarks:** Text input field.
- City:** Pomona, with a "more (click)" link and radio buttons for "Or Not".
- Area:** List of areas: 1 - Belmont Shore/Park, Naples, Ma; 2 - Belmont Heights, Alamos Heig; 3 - Eastside, Circle Area; 4 - Downtown Area, Alamos Beach. Radio buttons for "Or Not".
- Builder's Tract Code:** Text input field.
- Zip:** Text input field.
- MB#:** Text input field.
- Street #:** Text input field.
- Street Name:** Text input field.
- APN:** Text input field.
- List Price:** Text input field.
- Status Date:** Text input field.
- Current Price:** Text input field.
- CMA Status Date:** Text input field.
- Bedrooms:** Text input field.
- Baths Total:** Text input field.
- Sqft:** Text input field.
- Lot Sqft:** Text input field.
- View:** Dropdown menu.
- Pool:** Dropdown menu.
- Cooling:** Dropdown menu.
- Heating:** Dropdown menu.
- Fireplace:** Dropdown menu.
- Parking:** Dropdown menu.
- Patio:** Dropdown menu.
- Laundry:** Dropdown menu.
- Spa:** Dropdown menu.
- Senior:** Dropdown menu.
- Appliances:** Dropdown menu.
- Sprinklers:** Dropdown menu.

A red box highlights the text: **Map Search: Map Area Selected Clear Map**

7. Select additional search criteria as necessary.

Note:

When performing a Map Search do not select areas or cities outside of the area you selected on the map or you will not receive any results. If you need to clear the selected map, click **Clear Map**.

8. Click the **Search** button, then continue with "Viewing Search Results" below.

Viewing Search Results

Once you click the Search button on any of the search pages, the CRMLS Matrix Platform displays a search results window like this one:

The screenshot shows the CRMLS Matrix search results interface. At the top, there is a navigation bar with links for Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, and Logout. Below this, the search criteria are displayed: Residential - Detail - Quick, with a search filter for 'a sfr \$1250000-1600000 3+ 2+ 77'. The results are shown in a table with columns for ML#, S Type, St#, St Name, City, Area, MB#, L/S Price, Br/Ba, YrBlt, Sqft, LSqft, and DOM/CDOM. The table lists six properties, each with a checkbox and a link to the listing details. Below the table, there are navigation controls for 'Previous', 'Next', and '11' items, along with 'Top' and 'Bottom' links. A 'Carts' button is also visible. At the bottom, there are buttons for 'Revise', 'Email', 'Report', 'CMA', 'Map', 'Stats', and 'Save As'. A search filter is set to 'Search selected for'. The status of the search is 'Active', and the type is 'Single Family Residence'. The current price range is \$1,250,000 to \$1,600,000. The search found 6 results in 0.23 seconds.

ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM
P744680	A SFR/D	225 S	OWENS DR	AH	77	770J1	\$1,299,000	4/4.00	1979/ASS	3,697	20,680	323/323
P778606	A SFR/D	471 S	CANYON RIDGE DR	AH	77	770H2	\$1,300,000	5/4.00	1979/ASS	3,300	20,000	48/48
P774168	A SFR/D	352 S	MOHLER DR	AH	77	770J1	\$1,349,999	6/7.00	1975/ASS	4,600	37,200	82/82
P770374	A SFR/D	309 S	RAMSGATE DR	AH	77	770H2	\$1,350,000	5/6.00	1995/ASS	5,100	22,000	111/389
P768811	A SFR/D	7677 E	CORTO RD	AH	77	770J2	\$1,495,000	5/6.00	2005/SEE	5,061	21,431	128/283
P780849	A SFR/D	1046 S	SUNSTREAM LN	AH	77	771C30	\$1,500,000	5/5.00	2000/EST	4,200	9,461	26/26

If you have any questions or concerns regarding the listings displayed on the search results page, contact the CRMLS support department as described on page 51. To help CRMLS troubleshoot the issue, our support department will ask you to copy and paste your search criteria into an email and include any questions you may have about the results.

This close-up screenshot highlights the search criteria and status information. The search criteria are: 'a sfr \$1250000-1600000 3+ 2+ 77'. The status is 'Active', and the type is 'Single Family Residence'. The current price range is \$1,250,000 to \$1,600,000. The search found 6 results in 0.23 seconds. The search criteria are highlighted in a red box.

Refer to these sections to navigate within the search results page:

- “Search Results Links and Displays” on page 41
- “Search Results Icons” on page 42
- “Search Results Buttons” on page 43








Search Results Links and Displays

Refer to the table below for a list of links and displays available on the search results window.

Link or Display	Description
Check All	Click the Check All link to quickly select all listings on all search results pages.
Next	Click the Next link to view the next page of search results.
Previous	Click the Previous link to view the previous page of search results.
1 [2] 3 4 5 6 7	Click a number to jump to that page of search results. For example, click 3 to view the third page of search results. The number in brackets indicates the current search results page that you're viewing.
Carts	Click the Carts button to expand the Carts button bar. Click the Add to link to add the selected listings to the cart selected in the drop-down menu. Each Cart can have a maximum of 250 listings. You also can view the selected Cart from the search results page by clicking the Open button.
ML# A12345678	Click the Multiple Listing number link to view the full listing.
St Name Main St	Click the street name to view the listing on a map.
DOM/CDOM	Click the DOM link to view a history of the listing or the CDOM link to view a comprehensive history of the listing. The history will include price changes, selling office compensation changes, and the User ID of the change agent or entity. Note: <i>To view property history by APN and/or Street Address, perform a Property History search from the Search tab.</i>
Display	Select a display format from the Display drop down box to change the search results display to one of the various display formats available. Note: <i>You can change the default result display on the search page only. You can also change your listings per page from 25 to 10, 50, or 100.</i>
Search selected for	You can view listing history, property history, or open houses of selected listings by selecting Listing History , Property History , or Open House in the Search selected for drop-down box.
Criteria	The search criteria you selected is displayed at the bottom left side of the search results window.
View as	Select a client in the drop-down menu to view search results as one of your clients. This allows you to quickly see which listings you have emailed to them and if they have marked any of them as Favorites, Possibilities, or Discarded.













Search Results Icons

Refer to the table below for a list of icons available on the search results window.

Icon	Description
	<p>Indicates that either the list price or sale price has changed. The up arrow means that the list price or sale price has increased and the down arrow means that the list or sale price has decreased. To view the listing's history, click the DOM or CDOM link.</p>
	<p>Click the checkbox for each listing you would like to Narrow, Discard, Save, Sort, Print, Export, Email, or Map.</p>
	<p>Click the map icon to view the listing on a map.</p>
	<p>Click the camera icon to view a photo of the listing. Listings with a camera icon with a plus indicate that there are multiple photos available for that listing.</p>
	<p>Click the Realist Tax icon to open the listing in Realist Tax. Realist Tax combines public records, CRMLS listing data, maps, and market data in to a single research tool.</p>
	<p>Click the binoculars icon to add the listing to your Watched Listings. To view your watched listings, click Watched Listings on the My Matrix tab.</p>
	<p>Click the movie icon to view the listing's virtual tour.</p>

Search Results Buttons

Refer to the table below for a list of buttons available on the search results window.

Icon	Description
	Click the Revise button to change your search criteria. Note: <i>Clicking the Revise button is better than clicking your browser's Back button.</i>
	Click the Email button to email the selected listings to your clients (see page 46).
	Click the Report button to generate a report of the selected listings in PDF format. You can also print the generated PDF report or email customer reports to your clients for their review (see page 44). Note: <i>This is the best way to print listings.</i>
	Click the CMA button to generate a CMA report of the selected listings using the CRMLS Matrix Platform's CMA Wizard.
	Select multiple listings, then click the Map button to display all of the selected listings on one map and to get driving directions (see page 32).
	Click the Stats button to generate a chart, graph, or tabular view of statistics.
	Click the Save As button to save your search criteria. To view your saved searches click the Saved Searches link on the My Matrix tab. You can also create Auto Emails or Speedbar Shortcuts from your saved searches.
	Click the Narrow button to display only the listings you selected on the search results pages. You can narrow up to 500 listings.
	Click the Discard button to remove the selected listings from the search results page. You can discard up to 500 listings.
	Click Sort button to sort your search results by any field, such as the list date, sold date, etc. You can sort up to 500 listings. The default sort order is Status, Area, and Price.
	Click the Print Page button to print the search results directly from your browser. To change the view to show a different display such as a Customer Flyer, use the Display drop-down box to select one of the various display options before clicking the Print Page button.
	Click the Export button to download the selected listings and pictures to your favorite software program, such as 1004mc, Full, Pocket Real Estate, Top Producer and more. Agents can export up to 500 listings per export and brokers can export up to 2,000 listings per export.

Printing Listings and Reports

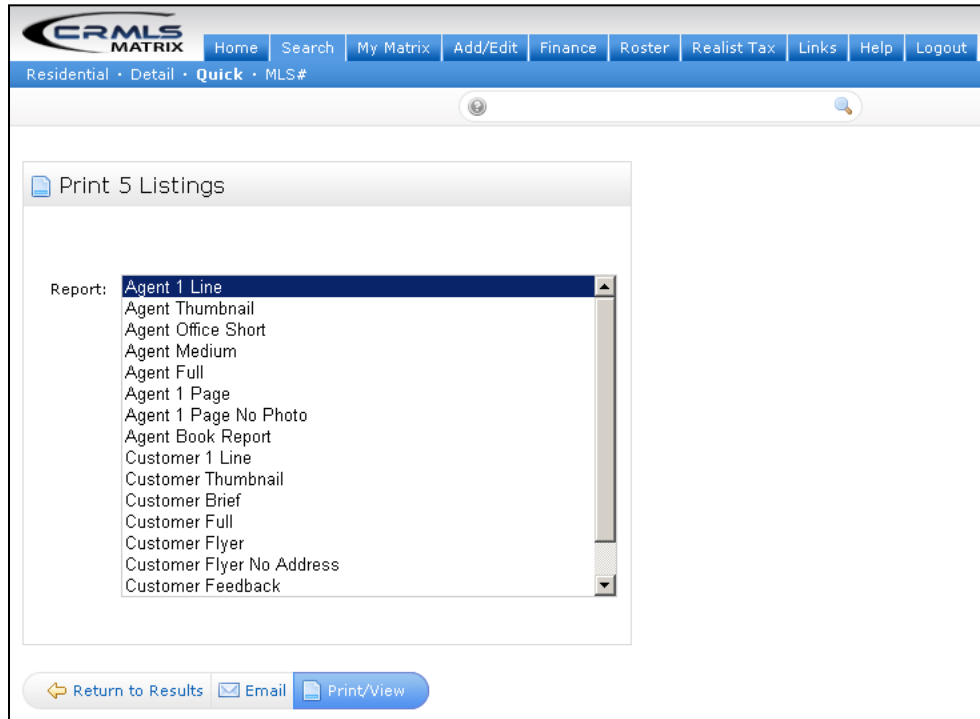
Follow the steps below to print listings and reports. Before you begin, make sure that you've performed a search as described in "Searching for Listings" on page 32.

1. Click the checkbox next to each listing you want to print.
2. Click the **Report** button.

The screenshot shows the CRMLS Matrix interface. At the top, there's a navigation bar with links like Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, and Logout. Below that, a search bar contains the criteria "A SFR 3+ 2+ 77". The main content area displays "Revised Original Results" with a table of 8 listings. The table has columns for ML#, S Type, St#, St Name, City, Area, MB#, L/S Price, Br/Ba, YrBlt, Sqft, LSqft, DOM/CDOM, V, P, and SOC. Several listings are checked with checkboxes. Below the table, there's a toolbar with buttons for "Revise", "Email", "Report" (highlighted with a red box), "CMA", "Map", "Stats", and "Save As". To the right of the toolbar are buttons for "Narrow", "Discard", "Sort", "Print Page", and "Export". At the bottom left, there's a summary of the search criteria: "Status is 'Active'", "Type is 'Single Family Residence'", "Area is '77 - Anaheim Hills'", "List Price Range is 1250000 to 1600000", "Bedrooms is 3+", "Baths Total is 2+", "Ordered by Status, Area, Selling Price, List Price", and "Found 8 results in 0.16 seconds." A "Search selected for" dropdown menu is also visible at the bottom right.

ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM	V	P	SOC
<input checked="" type="checkbox"/>	P721610	A SFR/D	5065 E CRESCENT DR	AH	77	770C3	\$1,285,000 ↓	4/3.00	1970/1	6,100	43,560		Y	Y	2.000
<input type="checkbox"/>	P747642	A SFR/D	1018 S SUNSTREAM LN	AH	77	771C2	\$1,299,900 ↓	5/5.00	2000/1	5,000	10,877		Y	Y	2.500
<input checked="" type="checkbox"/>	P759741	A SFR/D	7560 E COUNTRY SIDE RD	AH	77	770J2	\$1,399,000	5/5.00	2000/1	4,189	19,486		Y	Y	2.500
<input checked="" type="checkbox"/>	P752333	A SFR/A	7091 E AVENIDA DE SANTIAGO	AH	77	771A4	\$1,475,000	5/4.00	1985/1	4,000	39,055		Y	Y	2.500
<input type="checkbox"/>	F1848188	A SFR/D	7584 E MARTELLA LN	AH	77	770J1	\$1,495,000 ↑	5/6.00	2004/1	5,000	20,906		N	N	3.000
<input checked="" type="checkbox"/>	P744680	A SFR/D	225 S OWENS DR	AH	77	770J1	\$1,499,000	4/4.00	1979/1	3,697	20,680		Y	Y	3.000
<input type="checkbox"/>	P763281	A SFR/D	365 S COYOTE LN	AH	77	770J2	\$1,499,000	5/5.00	1991/1	4,839	35,724		Y	Y	3.000
<input checked="" type="checkbox"/>	S611129	A SFR/D	309 S RAMSGATE DR	AH	77	770H2	\$1,599,000 ↓	5/5.00	1995/1	5,100	22,000		Y	Y	2.500

3. Select the report you want to generate from the list.



Note:

To select more than one report, hold down the **CTRL** key on your keyboard as you select the reports you want to print.

4. Click the **Print/View** button to generate a PDF of each report you selected.

To print the generated PDF report, use your web browser's built-in print command.

You can also save the generated report by selecting the save option in your web browser.

Emailing Listings

The CRMLS Matrix Platform allows you to email listing reports or links to listings, for display in the Client Portal, directly from the search results page. Follow the steps in these sections to get started:

- “Emailing Listings for Display in the Client Portal” below
- “Emailing listings as a PDF Report” on page 48

Emailing Listings for Display in the Client Portal

1. Click the checkbox next to each listing you want add to your client’s Portal.
2. Click the **Email** button.

The screenshot shows the CRMLS Matrix search results page. At the top, there is a navigation bar with links: Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, Logout. Below the navigation bar, the page title is "Residential • Detail • MLS#" and the search criteria is "a sfr pomona 687".

The main content area displays a table of listings. The table has columns: ML#, S Type, St#, St Name, City, Area, MB#, L/S Price, Br/Ba, YrBlt, Sqft, LSqft, and DOM/CDOM. The first three rows are visible, with checkboxes in the ML# column. The first row (C11011632) and the third row (C11044233) have their checkboxes checked. The second row (Y1100494) has its checkbox unchecked.

Below the table, there is a row of action buttons: Revise, Email, Report, CMA, Map, Stats, Save As. The "Email" button is highlighted with a red box. To the right of the "Email" button, there are buttons for "Narrow", "Discard", and "Export".

ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM
<input checked="" type="checkbox"/> C11011632	A SFR/D	11080	Kadota AV	POM	687	641D2	\$95,000 ↓	2/1.00	1940/ASS	890	4,950	81/81
<input type="checkbox"/> Y1100494	A SFR/D	560	REGENE ST	POM	687	641A2	\$99,000 ↓	1/1.00	1929/ASS	608	2,640	86/86
<input checked="" type="checkbox"/> C11044233	A SFR/D	1488 W	Orange Grove AV	POM	687		\$104,900	2/1.00	1948/ASS	789	13,891	8/8

3. Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's e-mail address in the **To:** field.

Note:

- To select more than one contact, hold down the **CTRL** key on your keyboard as you select them.
- If your e-mail address doesn't appear in the **From:** field, you will need to add your e-mail address to your CRMLS Matrix account. Click the **Add/Edit** tab, type your Agent ID in the **Quick Modify** field under **Roster**, then click the **Edit** link.

The screenshot shows the CRMLS Matrix web interface. The top navigation bar includes links for Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, and Logout. Below the navigation bar, the breadcrumb trail reads "Residential · Detail · MLS#". The main content area is titled "Email 8 Listings" and contains an email composition form. The form has the following elements:

- From:** A dropdown menu showing "Christopher Smith" with a small icon to its right.
- To:** A text input field with a blue "To:" button to its left.
- CC:** A text input field with a blue "CC:" button to its left.
- Create a New Contact:** A blue hyperlink below the CC field.
- Bcc me a copy of this message:** A checkbox with the text "Bcc me a copy of this message." to its right.
- Display:** A text label "Display: All customer displays are automatically available to your contact."
- Subject:** A text input field with a blue "Subject:" label to its left.
- Email Body:** A large text area for composing the message, with a blue "Email Body:" label to its left.
- Character Count:** "Characters Remaining: 4096" and a blue "Check Spelling English" link below the email body field.
- Buttons:** At the bottom of the form are three buttons: "Preview" (with a magnifying glass icon), "Cancel" (with a red 'X' icon), and "Send" (with an envelope icon).

4. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you're sending.
5. Enter a subject for the e-mail in the **Subject** text field.
6. Enter a message for your client in the **Email Body** text field. You can enter up to 4096 characters in the Email Body text field.
7. Click the **English** link to spell check the message you typed in the Email Body text field.
8. Click the **Preview** button to preview the email message before sending it to your client.
9. Click the **Send** button to send the selected listings to your client.

Emailing listings as a PDF Report

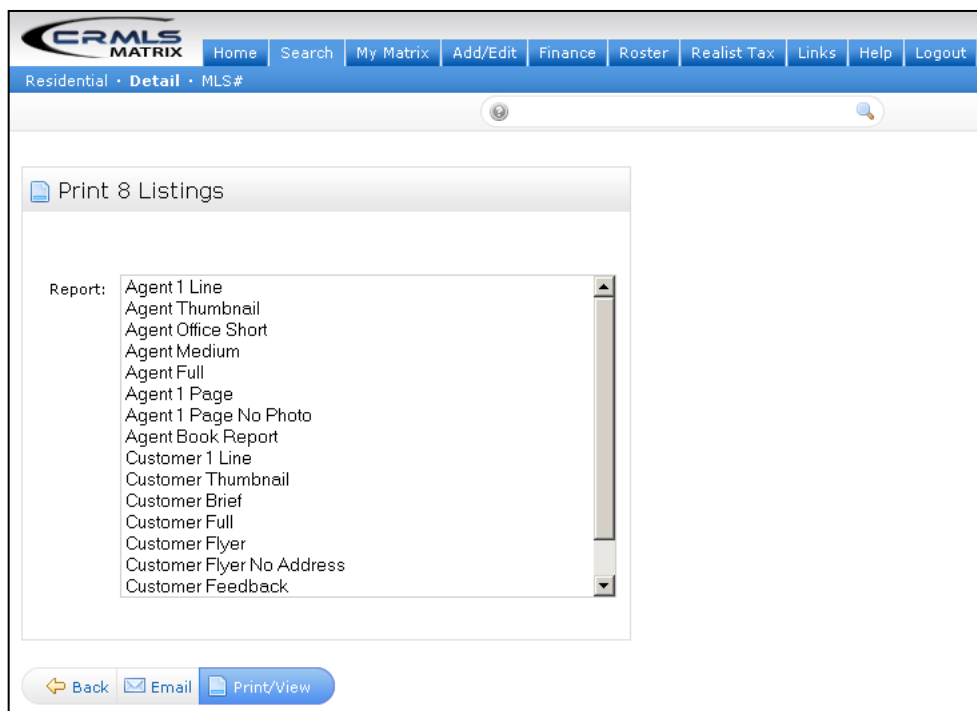
Follow the steps below to email listing reports. Before you begin, make sure that you've performed a search and are on the search results page.

1. Click the checkbox next to each listing you want to email in a report.
2. Click the **Report** button.



3. Select the report you want to email.

To select more than one report, hold down the **CTRL** key on your keyboard as you select the reports you want to email.



Note:

To preview the Report, click the **Print/View** button.

Agent Reports are not available to email.

4. Click the **Email** button.
5. Click the **To:** or **CC:** button to select a recipient from your contact list. To add a new client to your contact list, click **Create a New Contact**.

The screenshot shows the 'Email Reports' interface in the CRMLS Matrix system. The 'From:' field is pre-filled with a CRMLS Matrix email address. Below it are 'To:' and 'CC:' buttons, each followed by a text input field. A red box highlights the 'To:' and 'CC:' buttons and their respective input fields. Below these fields is a 'Create a New Contact' link. There is a checkbox for 'Bcc me a copy of this message.' Below that, a message states 'You have selected 1 report to email.' followed by 'Report: Customer Brief'. There is a 'Subject:' text field and a larger 'Email Body:' text area. At the bottom of the form, it says 'Characters Remaining: 4092' and 'Check Spelling English'. At the very bottom of the interface are 'Cancel' and 'Send' buttons.

Note:

To select more than one contact, hold down the **CTRL** key on your keyboard as you select them.

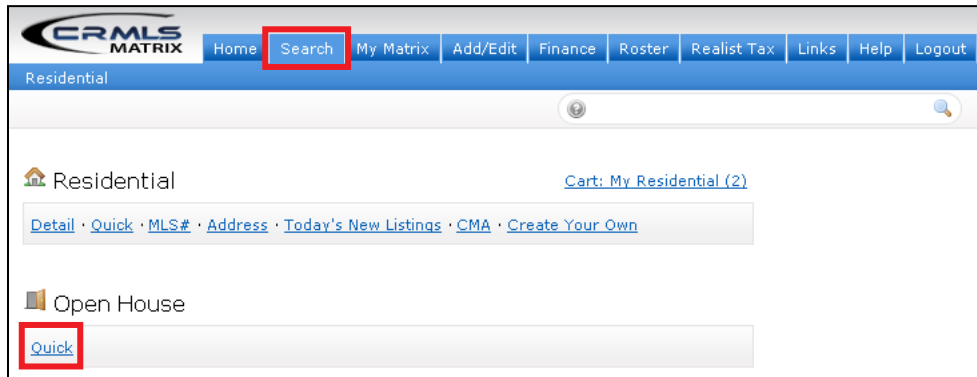
If your e-mail address doesn't appear in the *From:* field, you will need to add your e-mail address to your CRMLS Matrix account. Click the **Add/Edit** tab, type your Agent ID in the **Quick Modify** field under *Roster*, then click the **Edit** link.

6. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you're sending.
7. Enter a subject for the e-mail in the **Subject** text field.
8. Enter a message for your client in the **Email Body** text field. You can enter up to 4096 characters in the Email Body text field.
9. Click the **English** link to spell check the message you typed in the Email Body text field.
10. Click the **Send** button to send the selected report to your client in PDF format.

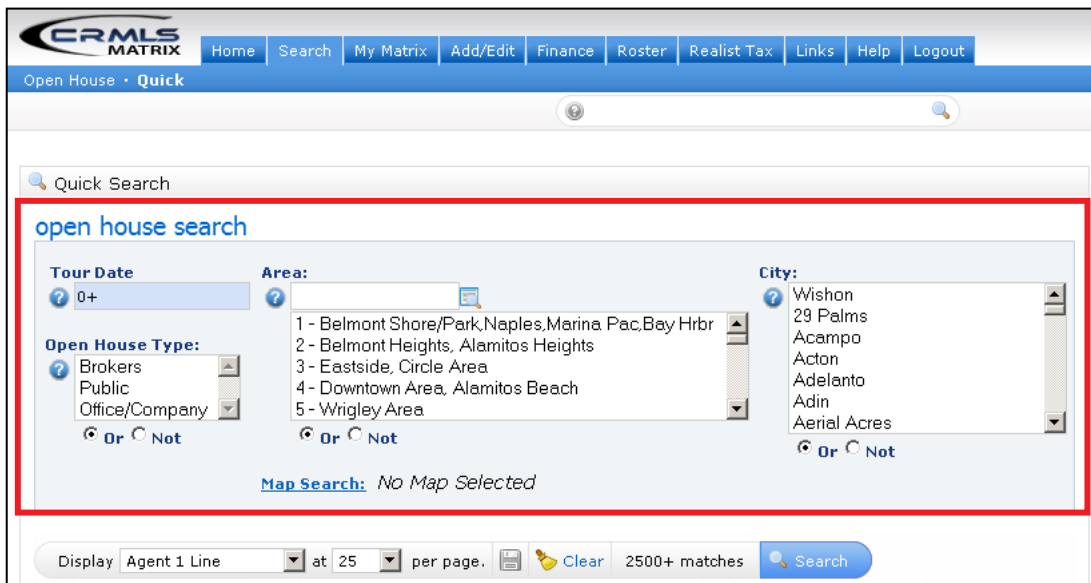
Searching for Open Houses

Follow the steps below to search for Public, Broker, and Office Open Houses.

1. Click the **Search** tab, then click the **Quick** link under **Open House**.



2. Enter your search criteria. To select more than one item in a field, hold the **CTRL** key on your keyboard while clicking the desired items. To deselect an item, hold the **CTRL** key on your keyboard and click the item you want to remove.



Note:

If you need help entering search criteria, click the ? icon next to the field you need help with. For a list of special characters allowed for search fields, See "Additional Search Options" on page 35.

Area information is currently not available for Amador, Chico, Oroville, Paradise, Madera, Mariposa, Merced, Tehama, and Yosemite Gateway.

3. Click the **Search** button, to view Open Houses that match your search criteria.

CRMLS Support Resources

Customer Support

To contact our technical support department, visit our website at <http://www.crmls.org> and click the **SUPPORT** button. Then click the **Submit Support Request or Suggestions** link to submit a support request or a suggestion (we value your suggestions).

The screenshot shows the CRMLS website interface. At the top, the CRMLS logo is displayed with the tagline 'CALIFORNIA REGIONAL MULTIPLE LISTING SERVICE, INC.' and a 'TECHNOLOGY CT' sign. Below the logo is a navigation menu with 'HOME', 'TRAINING', 'SUPPORT', 'NEWS', 'SERVICES', and 'CONTACT US'. The 'SUPPORT' link is highlighted with a red box. To the left of the navigation menu is a sidebar with links for 'RULES AND POLICIES', 'ASSOCIATION CONTACTS', 'PUBLIC PROPERTY SEARCH', and 'RECIPROCAL USER INFO.', along with a 'System Login' dropdown and a 'Go' button. Below the navigation menu, the word 'SUPPORT' is centered on a large blue background. To the right of this background is an image of a computer keyboard. Below the 'SUPPORT' section, there are two main content areas. The left area is titled 'CRMLS Members' and 'calREDD™ Members', both with 'Submit Support Request or Suggestions' links highlighted in red boxes. Below these links is a 'Support Hours' section with the following information: Monday-Friday: 8:30am-9:00pm; Saturday & Sunday: 10:00am-3:00pm; Technical Support: 800-925-1525 or 909-859-2040. A note states: 'Note: If you are needing assistance with account changes or billing, please contact your Association. Click Here for Association Contacts'. The right area is titled 'DOWNLOAD CENTER' and lists several resources: Training Manuals, Training Videos, Multiple Listing Input Forms, Image Resizer, Link Generator, Smart Trac Participant / Vendor Enrollment, Fannie Mae Market Condition Addendum, DataMaster, Builder Tract Reference Tool, and CRMLS Mobile.

If you need immediate assistance, our customer support technicians are available to answer your questions Monday through Friday from 8:30 AM to 9:00 PM and on Saturday and Sunday from 10:00 AM to 3:00 PM.

Toll Free Number: **(800) 925-1525**

On the web: <http://www.crmls.org/support>

Training Resources

CRMLS takes pride in providing quality training materials and training resources to fit all of our member's schedules and individual learning styles. Training resources can be found by visiting <http://www.crmls.org> and clicking on the **TRAINING** button.



CRMLS offers the following types of training:

- **Webinar Training (Web Conference):** On-line training classes that can be taken from the comfort of your home or office (requires a phone and high speed Internet access).
- **Hands-On Training:** Classroom style training classes held at the CRMLS offices in Pomona. Seating for these classes is limited, so be sure to sign up for them at the beginning of each month.
- **Instructor-Led Training:** Classroom style training classes held at your local association. Check the Training Calendar for a list of available classes.
- **Online Video Training:** Learn at your own pace with our on-demand video tutorials.
- **Product Documentation:** Download PDF copies of product manuals or download replacement training materials (requires Adobe Reader 7.0 or later).

Appendix

Searching for Listings on Your Mobile Devices

CRMLSMobile, powered by the CRMLS Matrix Platform allows you to search for Listings from your mobile devices. Follow the steps below to get started.

1. Open your mobile device's web browser and navigate to <http://www.crmlsmobile.com>.
2. Enter your User ID and Password in the fields.
3. Click the **Login** button and start searching for listings.

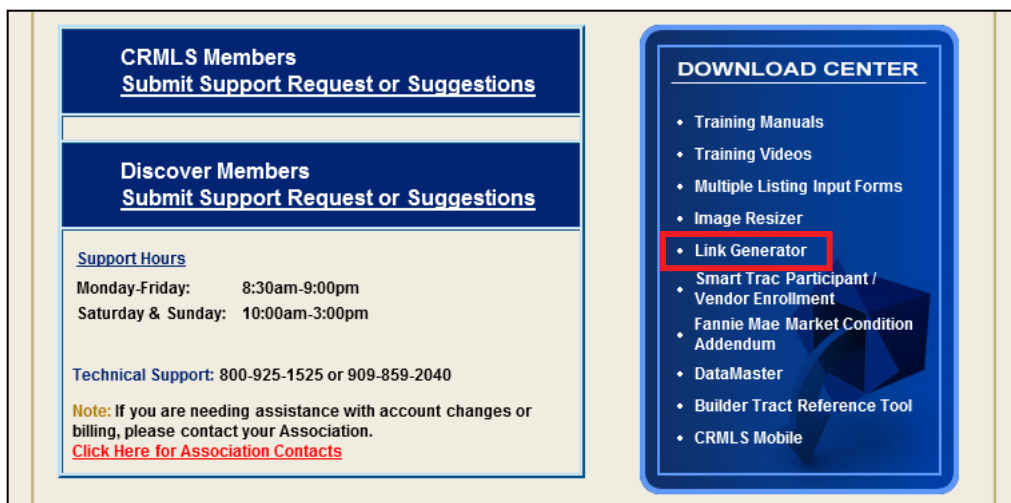
Note:

Access to CRMLSMobile is free, however, your wireless carrier may charge extra for Internet usage on your mobile device. Please contact your wireless carrier for Internet data rates and charges.

Adding a Public Search Link to Your Website

Follow the steps below to add a public search link to your website.

1. Open your web browser, go to <http://www.crmls.org/support>.
2. Click **Link Generator** in the Download Center.



3. Enter your Username in the **Public ID** field and your Office Code in the **Office Code** field.
4. Select a language from the list of available languages.



Public ID: Office Code:

Please Select Languages:

<input checked="" type="checkbox"/> English	<input type="checkbox"/> Spanish	<input type="checkbox"/> Russian	<input type="checkbox"/> Chinese Traditional
<input type="checkbox"/> French	<input type="checkbox"/> Italian	<input type="checkbox"/> Vietnamese	<input type="checkbox"/> Chinese simplified
<input type="checkbox"/> Polish	<input type="checkbox"/> Portuguese	<input type="checkbox"/> Japanese	<input type="checkbox"/> Korean
<input type="checkbox"/> German			

5. Click the **Get Links** button.

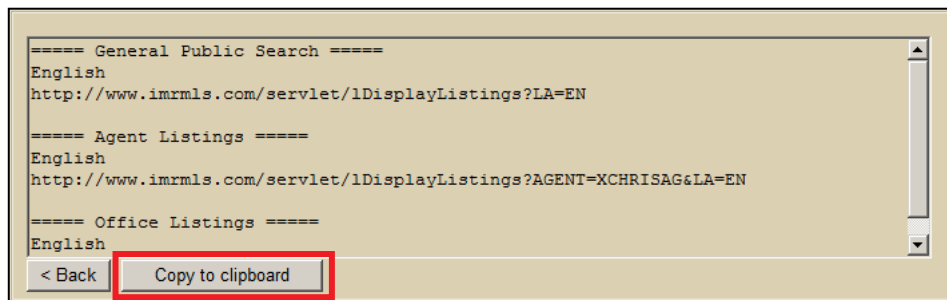


Public ID: Office Code:

Please Select Languages:

<input checked="" type="checkbox"/> English	<input type="checkbox"/> Spanish	<input type="checkbox"/> Russian	<input type="checkbox"/> Chinese Traditional
<input type="checkbox"/> French	<input type="checkbox"/> Italian	<input type="checkbox"/> Vietnamese	<input type="checkbox"/> Chinese simplified
<input type="checkbox"/> Polish	<input type="checkbox"/> Portuguese	<input type="checkbox"/> Japanese	<input type="checkbox"/> Korean
<input type="checkbox"/> German			

6. Click the **Copy to clipboard button** to copy the generated code.



```
==== General Public Search ====
English
http://www.imrmls.com/servlet/lDisplayListings?LA=EN

==== Agent Listings ====
English
http://www.imrmls.com/servlet/lDisplayListings?AGENT=XCHRISAG&LA=EN

==== Office Listings ====
English
```

7. Create a new email, paste the generated code into the email, and send it to your website provider.

Note:

There are three available links for your website, a General Public Search, an Agent Listings link, and an Office Listings link.