



PILLAR 9™

TECHNOLOGIES

Welcome to the Pillar 9™ MLS® System

To ensure a smooth transition to the Pillar 9™ MLS® System, we have put together information on various features within Matrix™ and listing Input.

Some sections have **"To-Do's"** to get you setup with settings and other items.

Be sure to review the entire document and make your migration to the new MLS® System as smooth as possible.

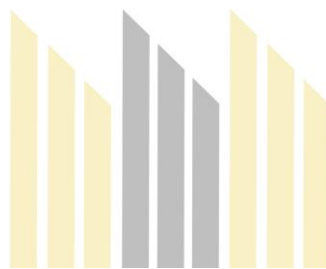
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Welcome to Matrix™

To ensure a smooth transition to your new MLS® System, we have put together some information on various features within Matrix™. Some are setup-oriented and have **“To-Do’s”** associated with them.

Please note, once migration is complete, agents should check all of their Active listings in Matrix™ to ensure the listings migrated properly and are displayed properly. A secondary check of the listing should be completed in the Input tool. This will allow agents to review all of the migrated listing data and review additional fields to update in their listings.

Conversion Timeline

Cutover from your existing MLS® System to the Pillar 9™ MLS® System will be on Wednesday, May 27, 2020. On Tuesday, May 26, Input will be turned off in the old system and Input will be turned on in the new system. There will be a 24-hour period from 10 a.m. (MDT) on May 26 to 10 a.m. (MDT) on May 27 where listing add/edit will not be available.

Your prior system will be available in READ-ONLY mode after May 27 for you to refer to your old data and settings, until June 10.

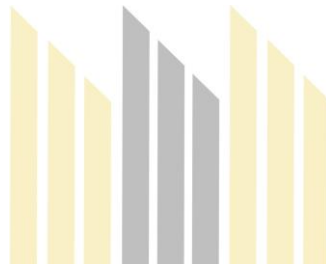
What will convert and what will not?

Below is a list of items that will and will not convert. Each are discussed further in this document to help you transition.

Will Convert	Will Not Convert
Listing Data	CMAs
Open House Data	Custom Displays/Grids
Media - Listing Photos and Supplements/Documents	IDX Setup
Listing History - Status and Price	Vanity Domain Setup
Agent Data (Membership System data)	Personal Information for Reports/Websites
Office Data (Membership System data)	Email Signature
Contacts	Team Name
Saved Searches	Incomplete Listings

Even though some items are being converted, there may be some changes that you will need to make to your settings in Matrix™. Below are “To Do’s” for you to setup Matrix™ and make your transition easier.

If an item is not being converted, it does not mean the feature is not available in Matrix™.



For the non-converted items, you will need to either configure the items in Matrix™ or export information from the other system as you deem necessary.

As stated above, below is information about various features in Matrix™. It goes over the items mentioned above as well as other features. Please read through it so you are aware of how things work and what you need to do to make the transition as smooth as possible.

Browser Compatibility

The MLS® System offering is compatible with the latest browser versions supported by mainstream operating systems. Retired operating systems and browsers, such as Windows XP and Internet Explorer 8 (IE8), are not supported. Anyone using a previous version of these browsers will be presented with a warning at login to encourage upgrading.

For the best compatibility when working through Matrix™, listing Input, and additional agent productivity tools, it is best recommended to utilize Firefox, Chrome, and in the case of Mac, Safari browsers. These browsers have the best compatibility across all the tools available to members.

Matrix™ Desktop

Anyone using a desktop and choosing to use Internet Explorer (IE) on Windows Vista can upgrade as far as IE9. Windows 7 and Windows 8 can upgrade to IE11. Firefox and Chrome automatically update to their most recent versions regardless of underlying operating system. Matrix™ Desktop supports the following browsers:

- Internet Explorer 10, 11, Edge
- And the most recent versions of:
 - Safari
 - Chrome
 - Firefox
 - Android Browser
 - Chrome Mobile
 - Safari Mobile

Matrix™ Mobile

Matrix™ Mobile supports the following browsers:

- IOS Safari
- IOS Chrome
- Android Browser
- Android Chrome

If accessing via a smartphone, Matrix™ automatically takes you to the mobile version as it auto-detects the device you are using.

Listing Input

Listing Input supports the following browsers:

- Safari
- Chrome
- Firefox
- Edge
- IOS Safari
- IOS Chrome
- Android Browser
- Android Chrome

Internet Explorer support is expected to be available in the future for listing Input. At this time, we would recommend using one of the other fully supported browsers.

Contacts

Your Contacts will be converted. You can update your contacts in the existing system. These updates will carry over to the new system at migration. If you do not update your contacts prior to migrating, they will transfer as is to the new system. Either way, all of your contacts will migrate during the cut-over period.

Contacts must have an email address to be converted. Emails are the unique identifier for contacts in Matrix™. Below are some sample conversion scenarios:

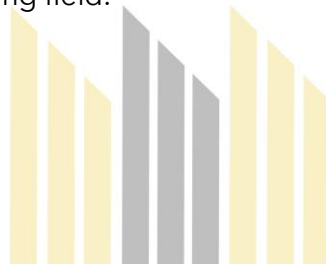
- 1. Mary Smith, mary@yahoo.com**
- 2. Mary Smith, mary@gmail.com**
- 3. M Smith, home phone 301-555-1212, mary@yahoo.com**
- 4. M Smith, home phone 301-555-1212**
- 5. Mary Smith, home phone 301-555-9999**
- 6. Bob Smith, mary@yahoo.com, cell phone 301-555-2323**

Based upon the above, you will have the following Contacts in Matrix™

1. Mary Smith, mary@yahoo.com, home phone, 301-555-1212, cell phone 301-555-2323
 - a. The conversion process will merge records 1, 3 and 4. Record 6 will also merge due to the email address match.
2. Mary Smith, mary@gmail.com

Record 5 will not convert due to an email address not existing.

Contacts must have a first and last name. If either the first or last name is missing, the email address will be placed in the missing field.



To Do: Review Contacts - make sure all your Contact information converted correctly. Edit your Contacts as needed.

- Click on **My Matrix™, Contacts** to view your Contacts
- Click on the **arrow** to the left of their name to get the editing options.

Click on Edit Contact if you need to update someone.

- A pop-up will appear with a few pieces of information. If you need to see more information, click on **Show All Fields** to see all the pieces of information about your Contact.
- Click on **Save** when finished.

You can also Add a Contact or Delete a Contact once you are in the Contacts section.

The Contacts, Auto-Email and Portal features of Matrix™ are integrated with each other. Make sure you read the sections on Auto-Email and Portal to understand more about how they work together.

Saved Searches

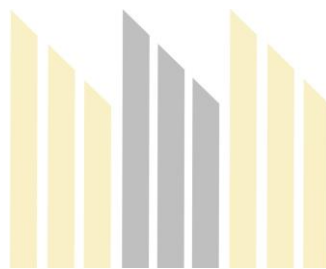
Your Saved Searches will be converted. You will want to verify each one as field names have changed and data is stored differently. Check the criteria of each one. You will also need to turn them on for auto-emails.

To Do: Enter Saved Searches - Enter Saved Searches and connect each to its Contact record. A Saved Search does not have to be connected to a Contact, but it's obviously helpful in many situations.

- Click on **My Matrix™, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the **arrow** in the Contact box to select the appropriate Contact.
- Click on **Save**.

To Do: Set up My Favorite Searches - My Favorite Searches appears on the Home page of Matrix™. You can enable up to 10 searches to appear on the Home page.

- Click on **My Matrix™, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- **Check the box** to Enable as Favorite Search on Home tab.
- Click on **Save**.



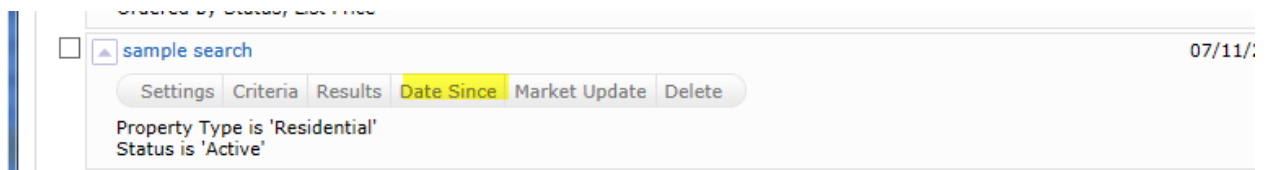
Saved Speed Bar Searches

These were not converted. If you had some setup in your prior system, please recreate them.

NOTE: There is no limit to the number of Saved Searches or Speed Bar Searches allowed.

Date Since in Saved Searches

Another unique feature with Matrix™ is the ability to execute a “date since” search on a saved search. This is similar to the hotsheet feature to see what has occurred since the last time you executed the search. To use this feature, click on the saved search under My Matrix™ and used the Date Since button shown below.



Personal/Marketing Information

The information from your membership system will be in the listings in the system. The settings below will not change how information will appear in a listing. Contact your Association if you need to change your information as it appears in your listings.

Some features in this document will use personal information that is in the system for marketing purposes. For instance, it personalizes your headers or footers on reports. This personal information is not part of your Association’s membership system.

Before you start using Matrix™, enter all your personal information first. This will make it so other features will properly work when you turn them on.

To Do: Email Signature - Set this up so you can turn on Auto-Emails and use other email functions.

- Click on **My Matrix™, My Information, Email Signature.**
- Edit how you want your signature to appear and click on **Save.**

You can only insert photos for your signature that are used with your Print Header, CMA Cover Page or Portal Greeting.

To Do: Information - This section contains information used on the Portal, in headers and footers as well as other areas of Matrix™. You can override what is in your membership system for first name, last name and email address. However, it is highly recommended to contact your Association to change your membership information at the source for those pieces of information.

- Click on **My Matrix™, My Information, Information.**
- Edit the various pieces of information and click on **Save.**

To Do: Header & Footer – This is the header and footer that can appear when printing Reports as well as on the Portal.

- Click on **My Matrix™, My Information, Header & Footer.**
- If you want to use one of the templates provided, Click on the **selection bubble** to the left of the one desired.
- Click on **Preview.**
- Choose **Select a Different Package** if you want to change the template.
- Upload a Photo of yourself, if desired.
- Click on **Save.**
- **OPTIONAL** - If you want to create a Custom Header/Footer
 - Click on the **selection bubble** to the left of Upload Custom Header/Footer.
 - Click on **Upload Images.**
 - Upload images, choose sizing and coloring as desired.
 - Click on **Save.**

Note: For best results, the optimum image size for an agent photo is 66 x 79 pixels and the header/footer banner is 1200 x 85.

To Do: Portal Information – This is used with your Portal. The information available includes the items you edited above on the **Information** page. If you do not see many items to choose from, you may need to first edit them on the **Information** page.

- Click on **My Matrix™, My Information, Portal Information.**
- Modify information as needed.
- Click on **Save.**

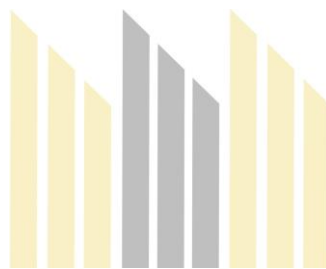
Note: For best results, the optimum image size for a portal photo is 100 x 100

To Do: Mobile Header – This is a slightly different header used for your Mobile Portal, since not as much information can fit.

- Click on **My Matrix™, My Information, Mobile Header.**
- Modify information as needed. It gives the option to add a different photo due to the size of the mobile header vs. a regular header.
- Click on **Save.**

Note: For best results, the optimum image size for a mobile photo is 60 x 60

To Do: CMA Cover Sheet – This is used with your CMA and allows you to enter extra contact information just for a CMA. The photo for the CMA Cover Sheet can be a picture of a house or something real estate related. It is not intended for it to be a photo of you, but it can be if desired.



- Click on **My Matrix™, My Information, CMA Cover Sheet.**
- Modify information as needed.
- Click on **Save.**

Note: For best results, the optimum image size for a portal photo is 80 x 120

Auto-Emails

Your Auto-Emails have been imported as Saved Searches, but need to be manually activated.

Any search that was used for an auto-email will have a plus sign at the beginning of the name (**+Imported Bob's 3 BR Condos**). If there is no plus sign in front of the search, then it was just a saved search.

With conversions, every effort is made to convert the saved searches complete. However, fields change or are removed and it's not possible to convert 100% of a saved search. If this is the case, an asterisk (*) will follow the name of the search (**+Imported Bob's 3 BR Condos***). The asterisk means your saved search is incomplete. Open the saved search in the old system and the new system and check the criteria to find the difference. Edit the criteria in Matrix™ as needed to make it fit your client's needs.

Also, criteria with saved searches may not be on the search screen by default. If this is the case, any field in a saved search will appear below the main search screen under Additional Fields - Add/Remove.

If you need help with your Saved Searches, please see the Searching section, further below in this document, for tips.

It is recommended for you to do the following before enabling any auto-emails:

Read through the **Portal Quick Start Guide** (hyperlink below). This document is for your customer, but make sure you are familiar with it. This will allow you to understand how the Portal experience works for your customers and answer any questions they may have.

https://www.corelogic.com/downloadable-docs/asset_upload_file973_51420.pdf

- Tell your customers the MLS® System is changing so they will be aware of the change in the look and feel of the information they will see and receive. Tell them to whitelist/allow emails from the new URL of the system (<http://matrix.pillarnine.com/>). Include the link to the **Portal Quick Start Guide** above. This will help them understand the changes.
- Personalize your Portal Information. Build it out so your customers have a pleasant experience and it has your personal branding on it.
- Configure your Header/Footer options. The Header appears on your Portal and provides you to brand the Portal site.

- Configure your Email Signature. This will enable your customers to see the information is coming from you along with your contact information.
- Customize your Welcome Letter that is sent when auto-emails are activated.
- If you have a vanity website/domain name pointing to your old system's portal, configure it to point to the new system. See the Agent Web Pages and Vanity Websites section below on how to do it.




When you cut over from the old Matrix™ system to the new Pillar 9™ Matrix™ system, auto emails in the old system will automatically be turned off in the old system. Auto emails will be disabled in the old Matrix™ instance on May 6th. At the same time auto emails are disabled in the old system, email functionality will be enabled in the new Matrix™ system.

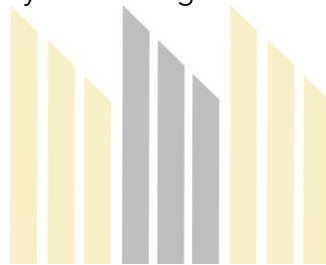
To Do: Enable Auto-Emails - Follow the steps below to setup auto-email for your customers and clients.

- Make sure you have reviewed your **Contacts** as indicated previously.
- Make sure you have reviewed your **Saved Searches** as indicated previously.
- Make sure you have set up your **Email Signature** as indicated previously.
- Click on **My Matrix™, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the link at the top that says **Turn this Saved Search into an Auto Email**
- Edit the information for the Auto-Email.
 - If you choose Daily as the option for sending, there is an AM and a PM option. The AM emails are sent at 8:00 a.m. The PM emails are sent at 6:00 p.m.
- Click on **Save**.

Note: A maximum of 900 records are returned with a search associated with Auto-Emails. Please make sure the Saved Searches that are enabled do not return more than 900 listings. If the search returns over 900 <https://www.corelogic.com/solutions/multiple-listing-technology.aspx> page which just has a brochure on the Multiple Listing Service listings, you will be prompted to edit the Saved Search.

Once an Auto-Email is setup, the email will be sent to your customer. The status of your Auto-Email will be one of the following:

-  Auto Email is Active, but the Contact has not yet logged in and activated their portal.
-  Auto Email is Active and has been accessed by the Client.
-  Auto Email is disabled by client or agent.



A customer can unsubscribe from just one email, from all emails from one agent, or from all emails from the MLS® System. If your customer is not receiving an email, make sure they did not unsubscribe from your emails or from the MLS® System emails.

If an auto-email has been setup and it returns zero listings for 90 days, it will be disabled by the system. Also, if an auto-email is not opened by your client, it will be disabled after 30 days.

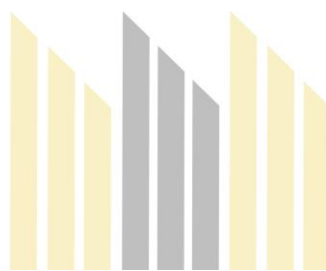
IDX

The IDX option in Matrix™ allows you to use an iFrame for your website to allow your customers and clients to search from the MLS® System. This option is for those who have a website where they can edit the content and web pages.

If you do not have a website, check out the Agent Web Pages option below. It gives you the functionality of a website without having to develop one.

- Click on **My Matrix™, Settings, and IDX Configuration.**
- Choose a **Name** for your page.
 - If you are only going to create one, you can enter something like “General IDX Search”. If you are going to create different iFrames, say one with map search and one without map search, name them accordingly.
- Choose the **Map Area.**
- If you chose Restrict Searches to a Specified Map Area, you will need to use the **Set Map Area** option to specify the area for the restriction. Make sure you **Save** the Map Area.
- Under Activation, choose **IDX Enabled.**
- Under Activation, enter the **Referring Page.** This is the page on your website where the IDX search will be framed. If you do not know it initially, make sure you come back and enter it later.
- Add any of the **Other Options** desired.
- Click on **Save.**
- HTML will be generated for your iFrame under the Activation section.
- **Copy the HTML** to give to the person who manages your website content.

If you have an existing IDX site, you can replace the HTML you currently use with the one generated above. You must do this after migration or your website will no longer operate correctly. Data will stop updating via the old HTML on the day your system cutover takes place.



Agent Web Pages and Vanity Websites

If you do not have a website, no worries! Matrix™ allows agents to have a web presence without developing their own website. These are known as Agent Web Pages.

If you have your own domain name (vanity website), you can redirect your domain name to Matrix™ Agent Web Page. However, you do not need a vanity website to use an Agent Web Page. A URL will be provided to your clients and customers if you don't have a vanity website.

- Click on **My Matrix™, My Information, Agent Webpage.**
- **Enable** the Agent Web Page.
- Enter the **Web Page URL.**
 - If you do not have a vanity domain, you will use this URL for your customers. Choose something that is short but identifies you/your page.
 - If you do have a vanity domain, you will provide this URL to your domain service to redirect your vanity name to it.
- Create your **Homepage Content.**
- Choose the **Map Area** option desired.
- Fill in the **Other Options** section, if desired.
- If you have a vanity domain, add it under **Additional Domains.** This will be used for security purposes so we can validate the sites pointing to your Agent Web Page.
- Click on **Preview.** Make changes as needed.
- Click on **Save.**
- **Notify your domain registrar** if you have a vanity website.

If you have an existing vanity website, you can replace the information with your domain registrar. You must do at cutover or your website will no longer operate correctly. Data will stop updating via the old HTML on the day your system cutover takes place.

Portal

The Portal is a feature of Matrix™ that allows you to interface with your clients and customers. The information your customers see on the Portal is real-time.

Below is a link to a document that you can give to your customers. It explains how to use the Portal from their standpoint.

https://www.corelogic.com/downloadable-docs/asset_upload_file973_51420.pdf

It is recommended for you to read through the document too, so you are familiar with how the Portal experience works for your customers.

Instructions on how to edit your Portal Information under My Matrix™ were provided above. Make sure you complete this section.

A Portal is available for each of your customers. To manage the information for each customer, go to the Contacts section under My Matrix™.

- Click on **My Matrix™, Contacts** to view your Contacts
- Click on the **arrow** to the left of their name to get the editing options.
- Click on the **Open Portal** option to see what they see.
- While looking at the Contact information, you can see the activity of your customer on the Portal -
 - Last Portal Visit
 - Listing Notes
 - Favorites
 - Possibilities
 - Discards

Make sure you check your Contacts section on a regular basis if you are utilizing the Portal feature. This is your dashboard to see what your customer is interested in and how you might alter their auto-emails.

Contacts and Portal are integrated. If you change the status of your Contact to Inactive, it will disable their Portal. Also, if you delete your Contact, the Portal will no longer be available to them.

Saved Searches and Auto-Emails are also integrated with the Portal. Make sure you read the section on Auto-Emails to understand how certain features within the Portal will function. For instance, if an auto-email has been setup and it returns zero listings for 90 days, it will be disabled by the system and drop from the Portal.

The Discarded listings on the Portal are purged after a certain time period. If the listing was part of an auto-email, it will drop after 14 days. If it was part of a direct email from you, it will drop after 90 days.

Market Watch

Market Watch is available on the Home page to provide you a quick look at what changes have occurred with listings in the system. Below is an explanation of the first few Change Types.

- New - Listings that are new to the system (see time frame below).
- Back On Market - Listings that have moved from Pending, or any other Off-Market status.
- Price Decrease - Listings where a decrease in price occurred.
- Price Increase - Listings where an increase in price occurred.

There are three options from the Home page to quickly change your look at the market.

- Property Type - Used to switch between Residential, Commercial, etc.
- Timeframe - Used to switch between Today, 24 hours, 3 days and 7 days. In the past, New was always 7 days. Matrix™ allows more flexibility associated with the timeframe.
- Customize - Used to narrow the criteria instead of defaulting to all listings.

Hot Sheets

As with Market Watch, Hot Sheets are available from the Home tab of Matrix™. Hot Sheets are searches that can use the Change Types in the system to provide quick information on what has happened recently in the market.

By default, there is a Hot Sheet for each Property Type. To edit or add a Hot Sheet follow these steps.

- Click on **My Matrix™, Settings, Hot Sheets.**
- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.

Or

- Click on **Customize** under **Hot Sheets** from the **Home** page.
- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.

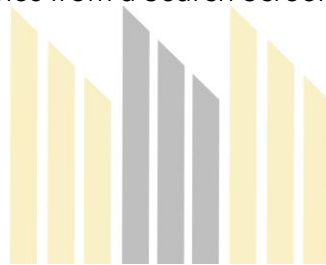
To run a Hot Sheet, follow these steps:

- Choose the **Timeframe** desired -
 - Since Last Search - Since you logged into Matrix™
 - New Only - Adds the Change Type of New only
 - 24 Hour - In the last 24 hours
 - Today - During the current day
 - 3 Day - In the past 3 days
 - 7 Day - in the past 7 days
 - Custom - allows you to choose any timeframe
- Click on the **Hot Sheet** desired.

Note: There is a limit of ten (10) Hot Sheets that can be accessed from the Home tab of Matrix™.

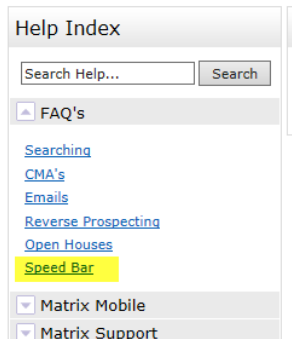
Searching

There are two ways to Search in Matrix™. One is on a Search Screen and the other is with the Speedbar. You can create saved searches for both. Speedbar Saved Searches are for use within Matrix™ only. Saved Searches from a Search Screen can be attached to a Contact and setup as an Auto-Email, if desired.



Speedbar Search

Speedbar Search is for shortcut searching. This is where you will search by MLS® System Number. There is no need to be on a Search Screen to use the Speedbar. When in Matrix™, click on the Help icon next to the Speedbar for tips on how to use it. Also, help is available from the Help tab under FAQ's.



One of the best ways to learn how to use the Speedbar is to watch what Matrix™ puts in the Speedbar when you do a regular search. The Speedbar will be filled in, even if you didn't use it. For instance, by searching Active, Residential listings in Avon, the Speedbar filled in the following.



Just like regular searches, Speedbar searches can be saved too. These use the slash ("/") to identify them from a non-saved Speedbar search.

Search Screens

Search Screens allow you to search by using all the various criteria in the system. This can include items such as select values for appliances and/or list price. Use the Search tab to access all the Search Screens created in the system. There are Search Screens for each of the Property Types, Open Houses, Agents and Offices.

Searching by Status

Searching by Status has the option to enter a Date Range or the Days Back to the criteria. Each Status has a date associated with it and the system is configured to know what date to look at.

For instance, Active uses Listing Date, Expired uses Expiration Date, and Sold uses Closed Date.

If you are saving a search and want the dates to change as time progresses, you should use the Days Back feature.

Here's an example:

- Scenario - Today is 7/1/2014. You want to save a search with various criteria for a client (enter city, price, beds, baths as needed). You only want to find listings brought on the market in the past 14 days. Both methods will return the same results on 7/1/2014.
- Using Date Range - To obtain the last 14 days of listings, you would enter 6/17/2014-7/1/2014. However, the Date Range method will continue to give you the same exact listings each time the search is run. On 7/2/2014, it is still looking at the 6/17-7/1 in the criteria.
- Using Days Back - To obtain the last 14 days of listings, you would enter 0-14. With Days Back, it provides a rolling timeframe associated with the search. It will always return the past 14 days of listings as time progresses.

Statuses changed slightly with the conversion. Please read the section below on Data Changes to find out more about it.

Searching by Property Type

With Matrix™, searching by more than one property type at the same time is possible. There are also Property Sub Types that are available for each Property Type.

For more information on how the Property Types have change, read the section below on Data Changes.

Sale/Rent

With Matrix™, Rental is not a property type, but a transaction type. Listings can either be sold or rented and a new field exists that gives you the option to look for both or either.

Since the majority of agents search for Sale listings, the default is usually set to Sale, but you can set and save your own defaults.

For more information on Transaction Type, read the section below on Data Changes.

Displays vs. Reports

In Matrix™, there are Displays and Reports. There is a difference between the two. Below is what distinguishes the two from each other.

Displays

- HTML based information seen after you search in your browser.
- Printable from browser, but with no header.
- PDF version available with option for header to be added.



Reports

- PDF reports that are created with Crystal Reports that allow additional functionality over HTML.
- Different styling is possible and usually creates a more aesthetically pleasing view of the data.
- Aggregate functions available (i.e. Median, Average).
- Headers/Footers are included.

The displays and reports were created with your Association's help. If you have feedback on what should be on a display or report, please contact your Association with your suggestion.

Custom Displays

Your Custom Displays will not be converted to Matrix™. Unfortunately, the systems differ too much to make it possible.

In Matrix™, you can create a Custom Display by using the following steps.

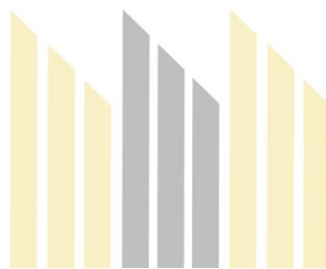
- Run a Search. The Agent Single-Line Summary is the default display.
- Hover over the icon to the right of "per page". (It looks like a page of paper with a pencil on it.) It will say Manage Displays. **Click on the Manage Displays icon.**
- Choose **Save as a Copy.**
- Go to **My Matrix™, Settings, Custom Displays.**
- A list of Custom Displays will be shown.
- Click on **Edit** and you can add or remove items as needed.

There is no option to create full-page reports in Matrix™. It is recommended to use Microsoft Word to create a report or flyer for your listings.

Setting a Default Display

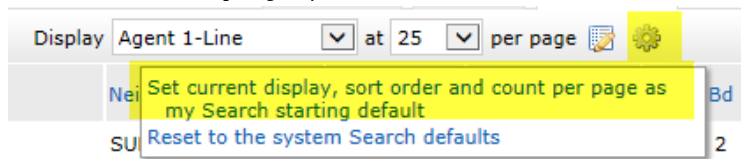
When searching, the default display is the single-line summary. To change this to a different system display or one that you customized under Custom Displays, use the following steps.

- Run a Search. The single-line summary will be the default display.
- Choose the display desired, such as Agent Thumbnail, from the Display selection menu at the top of the single-line display.



Area	Town	Display	Results
19	Suffield	Agent 1-Line	6
23	Berlin	Agent Single Line_test	6
31	Middlefield	Agent Full	6
23	Berlin	Agent Full - RES_No Suppression	6
31	Middlefield	Agent Full w/ Photos	6
23	Berlin	Agent Display	6
31	Middlefield	Agent Display - 1 Page - RES_copy	6
23	Berlin	Agent 1-Page	6
31	Middlefield	Agent Display w/ Photos	6
23	Berlin	Agent Single Line_test_mos	6
31	Middlefield	Agent 3-Photo	6
31	Middlefield	Agent 3-Photo w/Remarks	6
31	Middlefield	Agent Thumbnail	6
31	Middlefield	Agent Showing Sheet	6
31	Middlefield	Photo Report	6

- Select the **set default wheel** located to the right of the Display options. Choose the **Set Current Display** option.



- To return to the single-line display as your default, choose the Reset option instead.

CMA's

CMA's from your old system will not be converted to Matrix™. Unfortunately, the way they are stored in the system makes this not possible. If you have CMA's you need from your previous system, we recommend you save each CMA as a PDF on your computer. Or, you can recreate the CMA with Matrix™.

There is no limit to the number of CMA's you can have. CMA's with over 180 days of inactivity are purged from the system. Previously, this limit was 120 days.

To create a CMA, follow these steps:

- Click on **My Matrix™, My CMA's**
- Click on **Start a CMA**
- You will be walked through the CMA Wizard. This will include the following items:
 - **Start** - Select a CMA Contact
 - **Pages** - Select the Pages for the CMA
 - **Subject** - Select a Subject Property
 - **Cover** - Edit the Cover Information
 - **Comparables** - Search for and add Comparables
 - **Map** - Review Map information
 - **Adjustments** - Make Adjustments to the comparables based upon the attributes of the listings.
 - **Pricing** - Review the Pricing section. Add in your **Suggested List Price** and **Notes**.
 - **View, Save, Print and/or Email** the CMA as needed throughout the process.

At times, some items in the Wizard may not be available. Certain Pages need to be selected for options to be available. For instance, if you have not chosen a Cover Page to print, the Cover option will not be available.

Input

Pillar 9™ allows you to input listings along with Photos, Supplements and Open Houses. The system used for add/edit of existing and new listings is a change from that previously used in Matrix™. The new listing Input solution is a custom solution for Alberta members, provided and managed by Pillar 9™. This is a significant change for members, creating a database of listing history owned by the industry, at the source.

Roles are assigned to each person using Matrix™. An agent can edit any of their own listings or where they are the Listing Agent or Co-Listing Agent. An office manager can edit listings within their office. A broker can edit listings at the firm level, if needed.

Photos

With Pillar 9™, when adding a listing there is a status of Incomplete. The incomplete status cannot be seen when searching in Matrix™, only when using the Input tool. This status allows you to be able to add photos prior to submitting the listing to Matrix™.

Previously, there was a limit of 30 photos per listing. With the new system, the limit will be 50. Photo quality will be 1920x1080. For optimal performance, uploading photos that are equal to or lower than this quality will increase photo loading when creating and updating listings.

When entering a Photo, you can enter a Caption. This can be a title, such as "Kitchen", or a description about the photo, such as "View from back deck overlooking Lake Smith".

Supplements/Documents

Documents are called Supplements in Matrix™, as they do not need to be an actual document. All your documents from the existing system will be converted into Matrix™ along with your listings.

Supplements can be any file type (.DOC, .PDF, etc.). However, it is recommended you upload documents in a PDF format. This makes the document read-only and does not allow anyone else to edit your document.

Supplements in Matrix™ can have a file size of 20 MB. There is a limit of 10 supplements per listing. All supplements are only visible within Matrix™. They are not visible to the consumer.

