Matrix Client Portal – New and Improved!
The Matrix Client Portal has been vastly improved in Matrix 6.3. Now fully cross-property, consumers can view all their listings, create favorites and possibilities, in a single view regardless of property type or whether listings were sent by direct or auto emails.

Major changes include:
- Updated look and feel
- Integrated property mapping including split map/listing grid
- Enhanced Welcome page featuring:
  - Agent Portal Greeting
  - Featured properties slideshow displaying client favorites or possibilities
  - Direct Email and Report grouping
- Full cross property support of favorites and possibilities
- Ability to see all listings in one location
Client Portal Searches
New with Matrix 6.3, consumers are able to create and save their own listing searches within their portal. This new functionality means that consumer portals become the only tool that consumers need to manage listings of interest, as well as power their own property search. All searches created by consumers are logged within Matrix in My Matrix > Contact > Portal Activity and My Matrix > Contact > Portal Searches. This feature is optional; it can be turned on or off at the MLS level.

Portal Greeting
The new portal now allows Matrix users to post custom greetings to all of their contact portals, displayed on the portal Welcome page. Consumers can choose to close the greeting window but the window automatically re-opens as soon as their agent alters their greeting. Matrix users can manage the portal greeting from My Matrix > My Portal Greeting.
**Listing Notes**
Listing Notes provides enhanced agent/client communication within Matrix. Contacts and agents can post notes to a listing, which is then visible to the other party. Agents can add notes intended for their customers within Matrix and/or within the customer’s Portal.

Listing Notes functionality comprises of icons and a roll out. The notes icon indicates the notes status for this listing:
- Listing with notes
- Listing with unread notes
- Listing with no notes

Clicking the notes icon opens the notes rollout, where new and existing notes can be read and new notes added.

Listing Notes are optional per system.

**Agent Information Management Consolidation**
Users can now manage the information that appears in Portal, Agent Header Footer, and the CMA cover sheet, all from one central place under My Matrix > Settings > My Information. By default the agent’s displayed information is taken from their roster row but can be overridden to achieve the desired branding.

Note: This page should not be used to correct inaccuracies in the roster; those should be fixed using the roster management tool.
**Auto Email Resend**

When a new Auto Email is created within Matrix, it remains in a pre-active state until the recipient clicks the link within the initial welcome email; an action considered to indicate the recipient’s desire to “opt-in”. In order to facilitate re-sending this welcome email, in cases where it has been accidentally deleted for example, Matrix 6.3 includes new 'Resend Welcome' button. This button appears in the Auto Emails details rollouts and is only shown when the auto-email is in pre-active state. When clicked, the initial welcome email is re-sent to the auto email’s associated contact. Due to anti-spam considerations the button may be used only once per auto-email activation; following one use, the button becomes disabled.

**Auto Email / Direct Email Consistency**

In the continued interest of consistency across the product, the Auto Email and Direct Email pages have been improved as follows:

- Agent signature is displayed for reference below the message box with a link to edit the signature
- In Direct Emails, the portal link has been moved above the agent signature; to match its location in Auto Emails
- The default signature for all emails is now:
  
  Firstname Lastname  
  Phone Number  
  Office name

Note: Signatures are plain text only – HTML support was removed as a security measure to prevent HTML injection
**Map Pin Clustering**

In previous versions of Matrix, maps would not display pins if the query results exceeded 500 results. In 6.3, Matrix will group up to 5000 pins and display them on the Map using dynamic clusters, creating a richer user experience.

Note: If mapping more than 5000 listings, clusters will not display and Matrix will warn the user that there are too many results to map. The user can adjust criteria or zoom in the map to reduce the number of results.
Map Overlays
Along with map pin clustering, the introduction of map overlays in Matrix 6.3 further contributes to an enhanced user interaction with maps. All Matrix users will be able to glean a more comprehensive community overview with the addition of Bing’s Points of Interest. Existing Realist® customers will also benefit from the seamless integration of Realist map layers within Matrix including Boundaries, Parcel Characteristics, and Trends:

- **Boundaries**: colored delineations of geopolitical entities
- **Parcel Characteristics**: detailed information about individual properties
- **Trends**: aggregated information, available for condos, single-family, or both, for each of zip and neighborhood aggregation levels
- **Points of Interest**: Bing-provided business /community location markers

Note: GPL map overlays are ONLY available to US customers with Realist accounts. Bing points of interest are available to all customers.

Each of the above sections can be turned on or off per system.

In addition to the default layers, each system may configure custom sections, which appear between Trends and Points of Interest.

Within the map itself, layers containing a legend (e.g. Trends) are interactive; users can use CTRL-click to access further information about a particular map section.
1 Tab Printing
Following feedback from our users, the print page has been reduced to a single tab by consolidating Primary and Additional Reports into a single list. Primary reports (generated from HTML) top the list of reports, followed by PDF reports. Combinations of HTML & PDF reports can be simultaneously selected; when both are selected, Matrix users are limited to printing to a PDF report.