

Matrix™ 11 - What's New and Improved for Fall of 2023

Matrix™ MLS® System is new and improved. This document highlights key changes and improvements to the user interface.

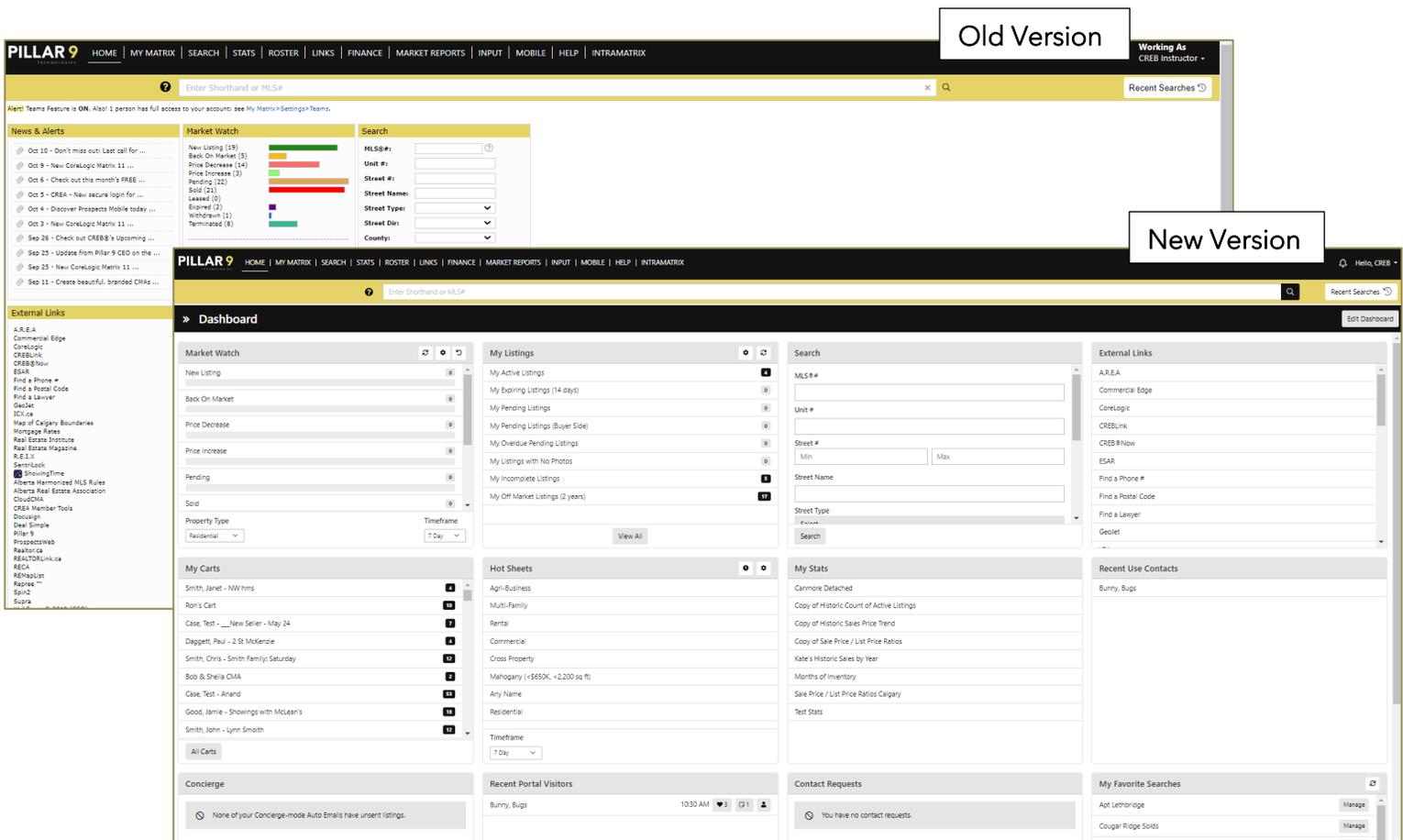
In this document:

1. Refreshed dashboard and customization tools
2. New portal notification timeline
3. Enhanced auto email page.

Let's explore the changes and improvements.

1. Dashboard and Customization Tools

Dashboard at a glance - Improved design and user experience



The image shows a side-by-side comparison of the Pillar 9 Matrix 11 dashboard. The top half is labeled 'Old Version' and the bottom half is labeled 'New Version'.

Old Version: The dashboard is cluttered with multiple overlapping widgets. On the left, there is a 'News & Alerts' section with a list of notifications. Next to it is a 'Market Watch' section with a bar chart showing various market metrics like 'New Listing (19)', 'Back On Market (5)', etc. To the right is a search form with fields for MLS#, Unit #, Street #, Street Name, Street Type, Street Dir, and County. The overall layout is less organized and harder to navigate.

New Version: The dashboard is significantly redesigned for better usability. It features a clean, grid-based layout with distinct sections:

- Market Watch:** A clear bar chart with categories like 'New Listing', 'Back On Market', 'Price Decrease', 'Price Increase', 'Pending', and 'Sold'.
- My Listings:** A list of listing statuses with counts, such as 'My Active Listings', 'My Expiring Listings (14 days)', 'My Pending Listings (Buyer Side)', etc.
- Hot Sheets:** A section for listing sheets with filters for 'Agn-Business', 'Multi-Family', 'Rental', 'Commercial', 'Cross Property', and 'Mahogany (>\$650K, <2,200 sq ft)'. It also includes a 'Timeframe' selector set to '7 Day'.
- My Carts:** A list of saved listings with details like 'Smith, Janet - NW Inns', 'Ron's Cart', and 'Case, Test - New Seller - May 24'.
- Search:** A more prominent search form with fields for 'MLS#', 'Unit #', 'Street #', 'Street Name', 'Street Type', and 'Street Dir', along with a 'Search' button.
- External Links:** A list of useful links like 'A.R.E.A.', 'Commercial Edge', 'CoreLogic', 'CREBLink', 'ESAR', etc.
- My Stats:** A section for performance metrics including 'Carmons Detached', 'Copy of Historic Count of Active Listings', 'Copy of Historic Sales Price Trend', etc.
- Recent Portal Visitors:** A list of visitors like 'Bunny, Bugs' with a timestamp of '10:30 AM'.
- Contact Requests:** A section showing 'You have no contact requests'.
- My Favorite Searches:** A list of saved searches like 'Apt Lethbridge' and 'Cougar Ridge Solds'.

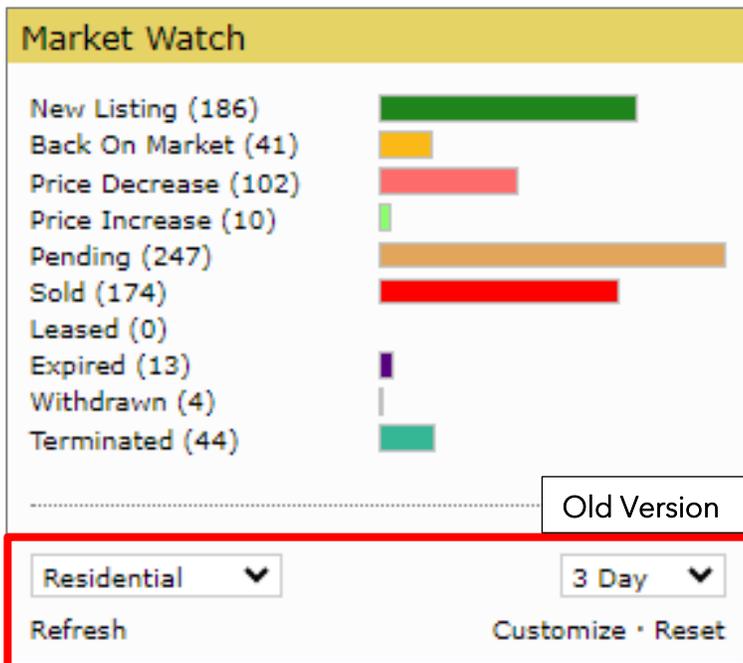
 The new version also includes a 'Concierge' section at the bottom left, stating 'None of your Concierge-mode Auto Emails have unsent listings.' The overall design is more professional, easier to read, and provides a better user experience.

Customizing Your Widgets

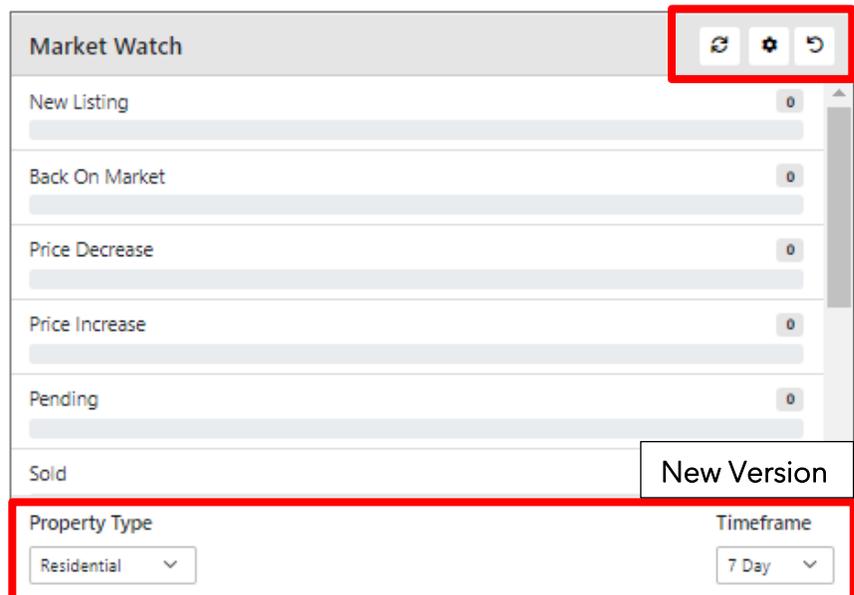
Customize your Market Watch, My Listings, and Hot Sheets widgets using the gear icons, or refresh or reset using the appropriate arrow icons.

Market Watch

- The gear icon opens the customization panel (no changes) or use the arrow buttons to refresh or reset previous customization,
- Drop down menu to select property type, and
- Drop down menu to switch among default timeframes.



Gear icon opens customization panel, double arrows icon refreshes results, and single arrow icon resets previous customization.



Select property type or timeframe from the drop down as before.



My Listings

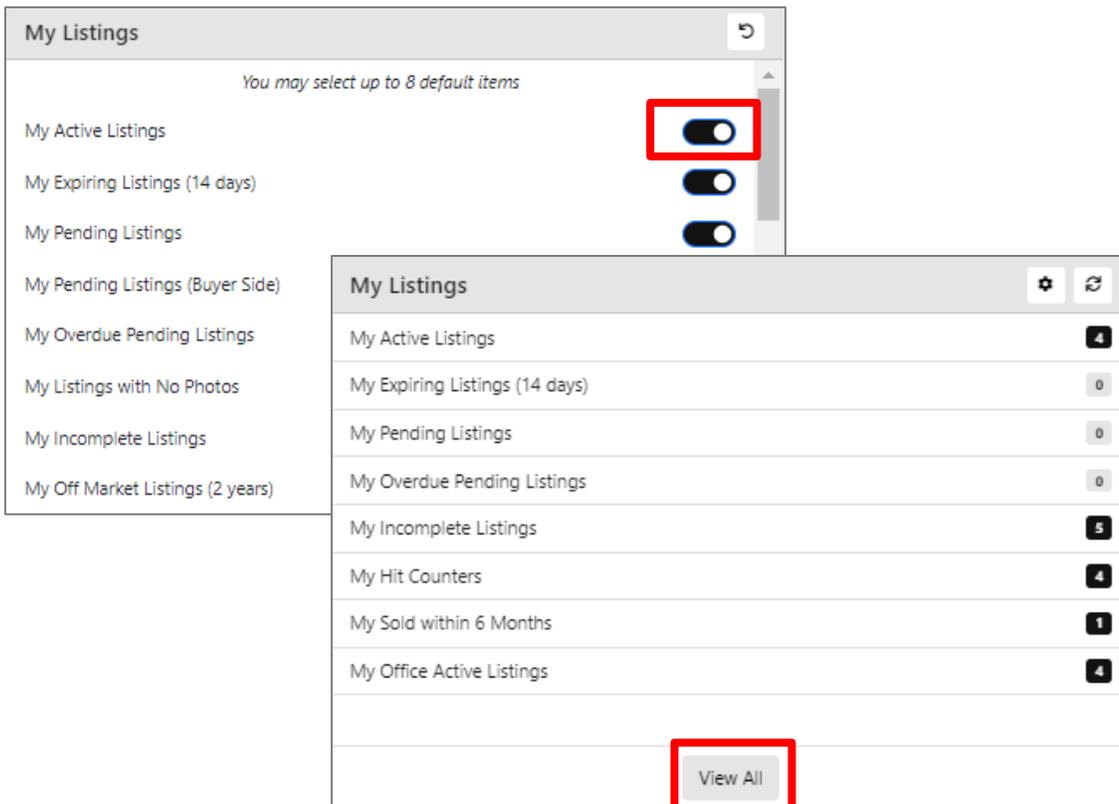
- a. Customize your default settings by clicking the gear icon.



- b. Hide or show listings categories (see below) by toggling the on- off-handles (up to a maximum of eight [8] defaults).

Note: If the handles won't toggle 'on', you've reached your maximum of eight defaults, try turning one or more off.

- c. Or choose View All to scroll all available listing categories.



Hot Sheets

- Customize, add, and delete Hot Sheets using the gear icon. The customization criteria page hasn't changed.
- Click the Clock icon, on the top right, to add a custom timeframe or select the Timeframe toggle, on the bottom left, to choose a default timeframe.

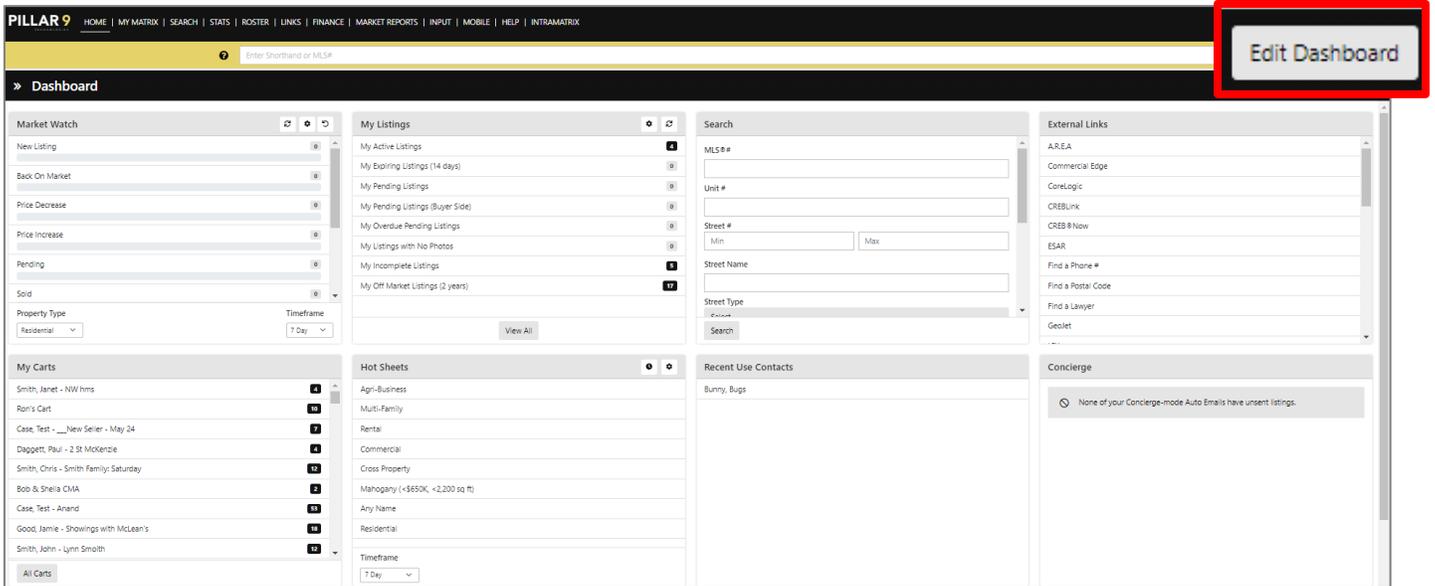
The screenshot shows the 'Hot Sheets' interface. At the top, there is a header bar with the title 'Hot Sheets' and two icons: a clock icon and a gear icon. The clock icon is highlighted with a red box. Below the header, there is a list of filters: Residential, Mahogany (<\$650K, <2,200 sq ft), NE Calgary Detached, Multi-Family, Commercial, Cross Property, and Any Name. A 'New Version' button is located to the right of the 'Residential' filter. At the bottom left, there is a 'Timeframe' dropdown menu with '7 Day' selected, also highlighted with a red box.

Add a custom timeframe by clicking the clock icon, instead of finding among the timeframe defaults in dropdown.

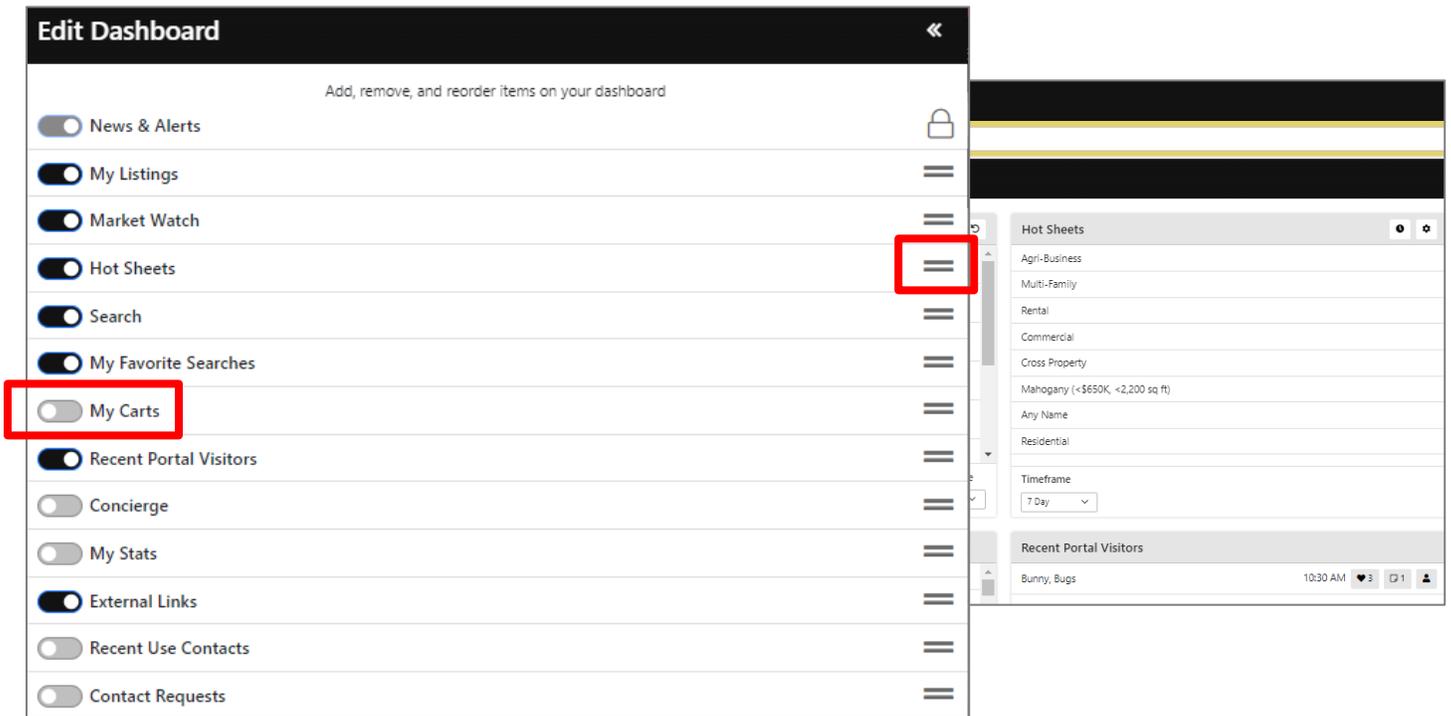
The screenshot shows the 'Hot Sheets' interface with a different set of filters: Land, Rental, Commercial, Cross Property, Tuscany - Single Fam, Detached Double, and Residential. A 'Customize' button is located below the filters. To the right of the 'Customize' button, there is a 'Timeframe' dropdown menu with '7 Day' selected. The dropdown menu is open, showing the following options: New Only, This Session, 24 Hour, Today, 3 Day, 7 Day, and Custom. The 'Custom' option is highlighted in blue.

Editing Your Dashboard

- a. To edit your dashboard, click the Edit Dashboard button the top right-corner of your dashboard screen.



- b. An Edit Dashboard panel will open on the left. Toggle the on-off-handles on the left to hide or unhide widgets, or drag and drop widgets using the handle on the right to change in what order they appear.



d. To close the Edit Dashboard panel, click the arrows on the right.



2. Portal Notification Timeline

The Portal Notification Timeline is a new feature, and it shows recent portal interactions.

The image shows a screenshot of the Pillar 9 dashboard. At the top, there's a navigation bar with 'PILLAR 9' logo and various menu items. Below that is a search bar and a 'Good Afternoon' greeting. The main dashboard area is divided into several sections: 'My Listings' (with sub-sections like Active, Expiring, Pending, etc.), 'Market Watch', 'My Favorite Searches', and a 'Timeline' panel on the left. The 'Timeline' panel shows a list of recent interactions such as 'Bugs Bunny added a note to a property', 'Bugs Bunny added a favorite property', etc. A red box highlights the gear icon and double-left arrow icon in the top right of the timeline panel. A 'Timeline Settings' modal is open, showing a list of notification types with toggle switches. The 'Removes a Favorite' toggle is highlighted with a red box. At the bottom of the modal are 'Cancel' and 'Save' buttons.

a. Your timeline panel will appear on the left of your dashboard.

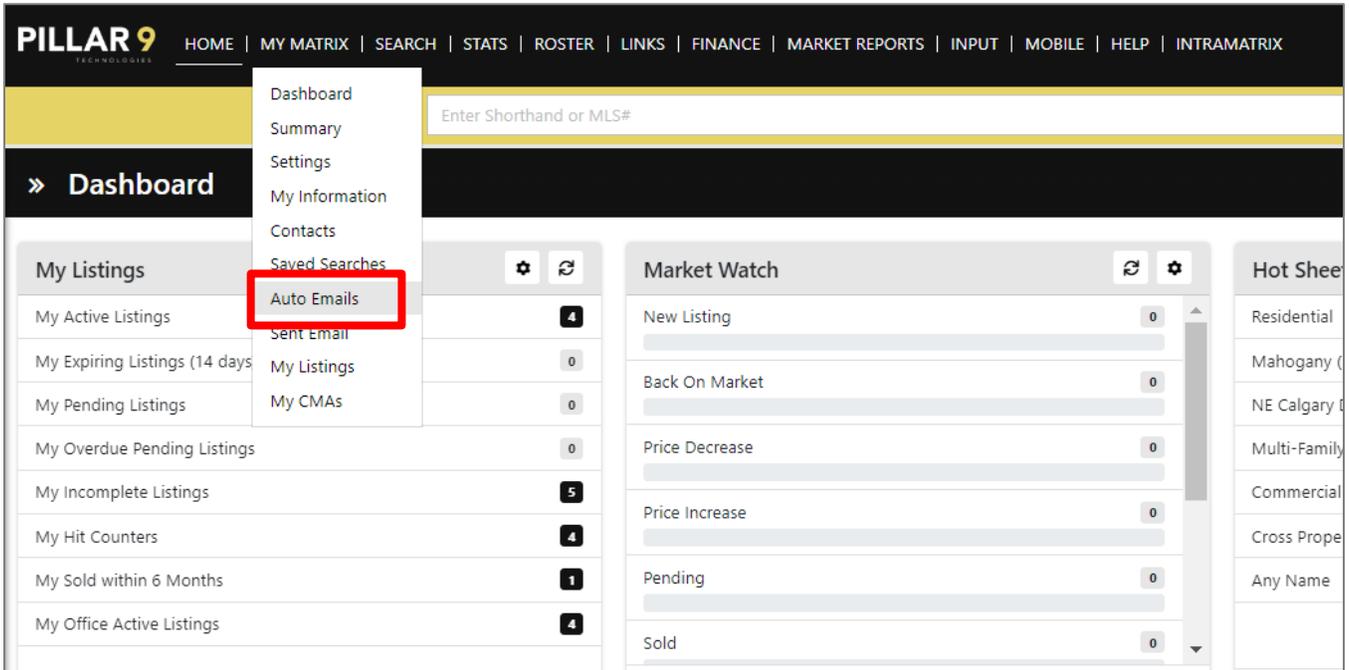
b. Customize the interactions captured in your timeline by clicking the gear icon, or click the corresponding arrows to refresh or close the panel.

c. Toggle the handles on or off for the interactions you want to track, and click save.

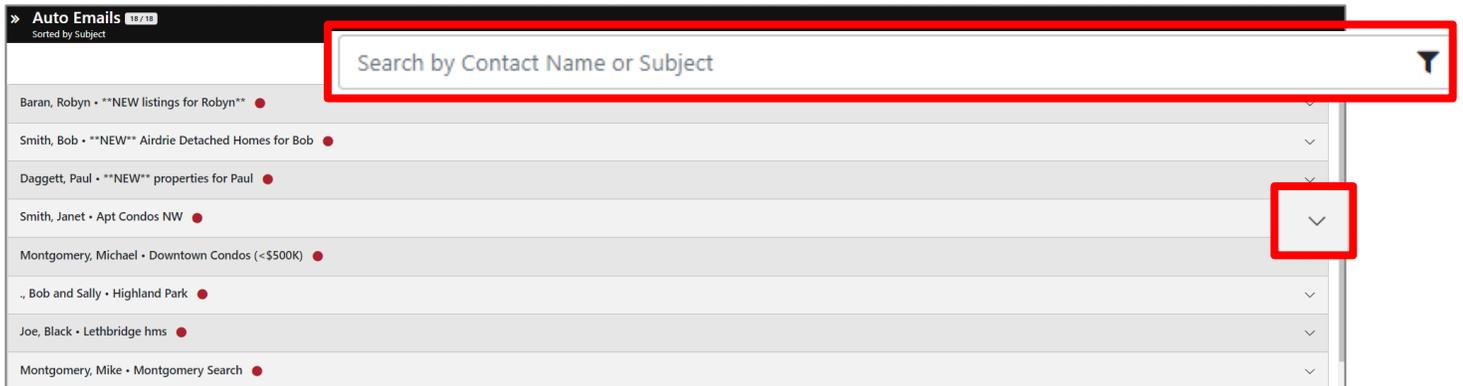
d. Click the arrow to the left of "Dashboard" to close the timeline panel.

3. Auto Emails

- a. To access, edit, and filter your auto emails (or saved searches) page, go to My Matrix and click on Auto Emails from the drop down.



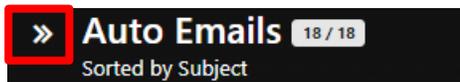
- b. To search, type the client name or a keyword in the search field.
c. To see the details of an auto email, click the drop down arrow on the right to open the panel.



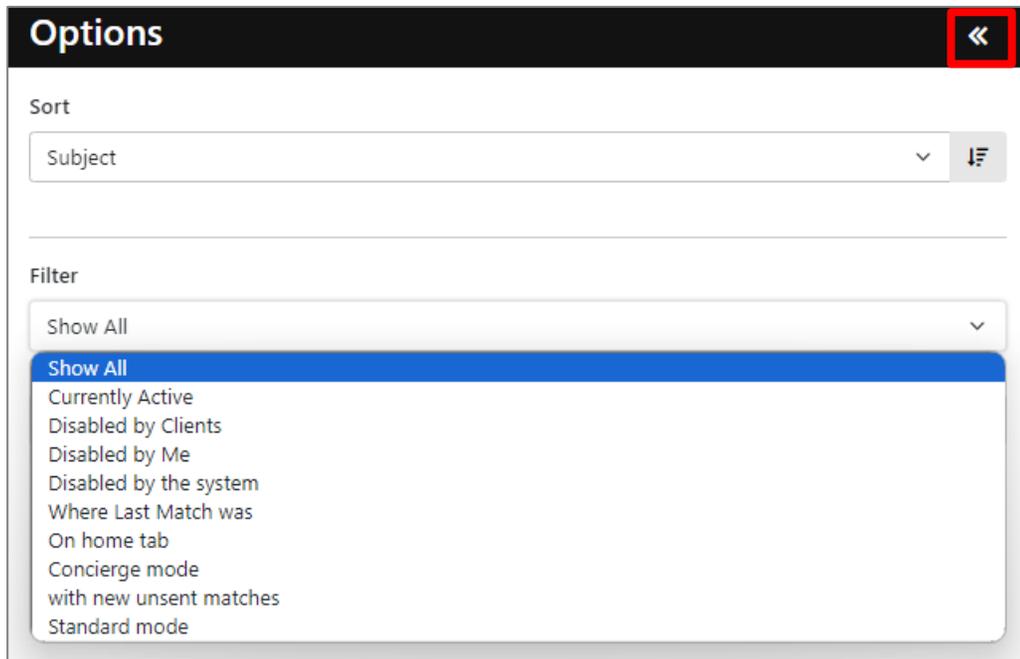
- d. Edit your auto email using the buttons at the top and bottom, on the left side, of the panel.



- e. Sort or filter your auto emails by click the arrows to the left of 'Auto Emails' to open the sort/filter panel.



- f. You can sort or filter by default criteria. Click the back arrows to close the panel.



Why these changes and why now?

- Updated and modernized design
- Enhanced user-friendliness and improved responsiveness
- Moving toward making Matrix™ MLS® System mobile-friendly