Contacts

To add or revise a Contact:

1. Click the “My Matrix” tab.
2. Click the “Contacts” link.
3. Click the “Add Contact” button. (To revise a Contact, click the “Edit” link next to the Contact’s name.)
4. Fill in as many fields as you wish. Be sure to fill in the email address field so that you can email listings to the client.
5. Click the “Add” button (or if editing a Contact, click the “Save” button).

To delete a Contact:

1. Click the “My Matrix” tab.
2. Click the “Contacts” link.
3. Click to place a check mark in the select box next to each Contact you want to delete.
4. Click the “Delete Selected” button.
5. Click “OK” to confirm.

Tax

How do I search the Tax records?

1. Click the “Tax” tab, and then select any of the available Tax searches.
2. Tax search is very similar to listing search. When searching by an Owner’s name, most counties list first name first. Use the asterisk * (wild card search) to account for name variances that might be in the tax record. For example, if the name is Timothy Jones, enter tim*jones*. The first asterisk will ensure you find the record regardless if the name is entered as “Tim,” Timothy,” “Timothy R.,” etc. The second asterisk accounts for the possibility of a suffix such as “Sr.,” “II,” etc. Use similar logic when entering the street name.

How do I create and print mailing labels?

1. Conduct a Tax search to find the records for which you want to create labels.
2. On the search results page, click the “Check all XXX” link
3. Click the “Print/Labels” button.
4. Click the Mailing label type you want, and then click the “Create Report” button.
5. Your formatted labels will open in a new window. Select File>Print from the Web browser menu to print to your label sheets.

Main Navigation Tabs

Home	View News, Run Hot Sheets, Quick MLS# Search.
Search	Find listings that match your client’s criteria. Save searches and be automatically notified of new property matches. Print and email listing reports and CMAs. View and print statistics and maps.
My Matrix	Check Watched Listings. Update and run saved searches. View your Active and off-market listings. Set-up and edit your Contacts. View your email history. Create your own custom single line displays. Manage your saved CMAs.
Finance	A variety of financial calculators.
Roster	Find contact information for other agents and offices.
Tax	Find tax records (where available). Quickly create mailing labels.
Home Base	Add/Edit listings, photos, supplements, open houses.
MLS Co-op	Search Active listings in outstate Minnesota.
Help	Link to users manual and instructions for a variety of Matrix tasks.
Logout	Log out of NorthstarMLS Matrix.

NorthstarMLS Matrix

Quick Reference Guide

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http://www.northstarmls.com

(Click the NorthstarMLS Matrix icon under “Our Services on the left side of the screen.)

To log on:

Type your Agent ID number in the **User ID:** box. Type your 4-digit PIN number in the **PIN** box. Type a SafeMLS password from your SafeMLS token into the **SAFEMLS® Password** box. Click the **Login** button or press the **Enter** key on your keyboard.

Search

How do I?	By doing this…
Start a search?	Click the **Search** tab. Click any of the available searches (General, Detail, MLS #, etc.) under your desired **Property Type**.
Select Area, County, Municipality or School District?	If you know the codes, type them directly into the input box with a comma between each one. If you need help finding a code, click the magnifying glass icon next to the input box.
Enter Street Name?	Use an asterisk * (wild card) if unsure of spelling (ex: Hen*p*n).
Enter number fields (Bedrooms, List Price, etc.)?	**3**…....Exactly 3 bedrooms **3-5**…3 to 5 bedrooms **3+**….3 or more bedrooms **3-**…..3 or fewer bedrooms For Price, enter number only (no dollar signs or commas).
Enter dates? (mm/dd/yy)	**10/31/08**…………...for exact date **10/31/08-11/15/08**..for date range **10/31/08+**…everything since date **0-5**……..5 days back from today
Define a custom search area using the map?	Click the **Map Search** link. Zoom the map using the map controls, **Jump to** drop down box or Address. Click on desired shape link and drag your cursor to draw shape defining your custom search area. Click **OK**.
Add fields I use frequently?	Select **"Click here to add or remove other search fields."** In the Available Fields box, click on a field you want to add, then click the **Add** button (or simply double click the field). Repeat as needed. Click the **UP** and **DOWN** buttons to rearrange the order. When finished, click **Return to Search**.
Execute Search?	Click the blue **Search** button or press **Enter** key on keyboard.

Search Results

How do I?	By doing this…
Add to Watched Listings?	Click the icon. Click **Close** button or select Contact and click **Attach to Contact**.
View photo(s)?	Click the icon.
View a map?	Click the icon.
View a virtual tour?	Click the icon.
Select a listing?	Click the select box. To select all listings on the page, click the select box in the column header bar. To select all search results, click the **Check all xxx** link at the top of the page.
View the Property Full Display?	Click the MLS Number link. Use the **Change display to** drop down box at bottom of page to choose other displays.
Sort differently?	If you have 500 or fewer results, click the **Sort** button. Use the **Add** button to add fields from the left to your sort. Use the **Remove** button to remove fields from your sort on the right.
Plot multiple properties on a single map?	Select the properties you want to map. Click the **Map** button.
Narrow my results?	Select the listings you want to keep. Click the **Narrow** button to remove all nonselected listings.
Save my search?	Click the **Save** button. Enter a Search name and description. If saving for specific client, select that Contact from **Primary Email Contact** list. Click the **Save** button. You will find your saved searches under the **My Matrix** tab.
Revise my search?	Click the **Revise** button. Make desired changes and click **Search**.

Printing

Screen:

1. Select the listings you want to print.
2. At the bottom of the screen, select the Display you want to print (from the drop-down box).
3. Click the **Print Friendly** button.
4. Select **File>Print** from the Web browser menu.

PDF Report:

1. Select the listings you want to print.
2. Click the **Reports** button.
3. Click to select the report you want to print.
4. Click the **Create Report** button.
5. Select **File>Print** from the Web browser menu.

Emailing

To manually email one or more listings:

1. Select the listing(s) you want to email.
2. Click the **Email** button.
3. Select one of your **Contacts** or type an email address in the **To** box. Use commas to separate multiple email addresses.
4. If you want a copy sent to you, click to check the **Send to me** box.
5. Select a format. After selecting, click the **Preview** button to preview what it will look like for your recipient.
6. Type in your subject and message.
7. Click the **Send Email** button.

To set up a client for Auto Email:

1. Create and execute a Search for your client.
2. Click the **Save** button. Type in a search name, and select your client from the **Primary Email Contact** list.
3. Click the **Enable Auto Email** button.
4. If you want copies sent to you, click to check the **Send to me** box.
5. Type in a Public AE Name. Select a display.
6. Set schedule. Click the **Save** button.

To disable Auto Email for a client:

1. Click the **My Matrix** tab
2. Click **Saved Searches/Market Updates**.
3. Under the client's Saved Search, click the **Settings** link.
4. Click the **Disable Auto Email** button.
5. Click the **Save** button.