

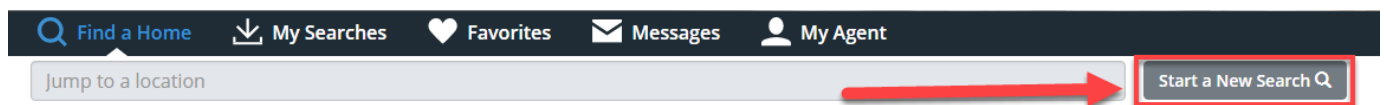
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Matrix Portal Searches

Updated 2 days ago

When you set up a customer as a Contact in Matrix, not only does it create a Portal for them (which is where they are brought when they open up one of your Matrix emails), but it also allows them to perform their own searches against the MLS listings database. The number of fields accessible to them on a Portal search screen is limited (and not customizable), but it does give them the flexibility to search for listings using different criteria than that which you used in their Auto Email search.

When a Contact is in their Matrix Portal, they can click on the **Start a New Search** button to open up a search screen and enter their own search criteria:



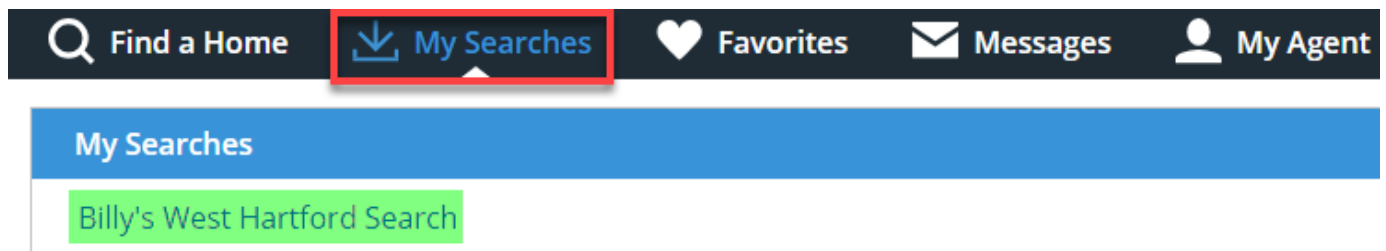
They will not have the same fields on the Portal Search screen that MLS members have when logged into Matrix, nor can they customize the search or add additional fields to it. But it does enable them to run their own searches, in case they may be interested in looking for properties that do not match the Auto Email saved search you set up for them.



Location				
County Fairfield Hartford Litchfield	City <input type="text"/>	Neighborhood <input type="text"/>	Street Name <input type="text"/> Zip Code <input type="text"/>	
MLS Number <input type="text"/>				
Portal Criteria				
Property Type <input type="checkbox"/> Single Family Sale <input type="checkbox"/> Condo/Co-Op Sale <input type="checkbox"/> Multi-Family Sale <input type="checkbox"/> Residential Rental <input type="checkbox"/> Lots and Land <input type="checkbox"/> Business For Sale <input type="checkbox"/> Commercial Lease <input type="checkbox"/> Commercial Sale Sub Property Type Condominium Agricultural Land Commercial Land Cooperative 2 Family	Style (Res) Cape Cod Colonial Contemporary Raised Ranch Ranch Split Level <input type="radio"/> And <input type="radio"/> Or <input type="radio"/> Not New Construction <input type="checkbox"/> Completed <input type="checkbox"/> Model <input type="checkbox"/> No <input type="checkbox"/> To Be Built <input type="checkbox"/> Torn Down & Rebuilt <input type="checkbox"/> Under Construction Waterfront <input type="text"/>	Rental Type <input type="checkbox"/> Yearly Unfurnished <input type="checkbox"/> Yearly Furnished <input type="checkbox"/> Summer Unfurnished <input type="checkbox"/> Summer Furnished <input type="checkbox"/> Winter Furnished <input type="checkbox"/> Winter Unfurnished <input type="checkbox"/> Flexible Rent Terms <input type="checkbox"/> Month-to-Month <input type="checkbox"/> Short Term <input type="checkbox"/> Academic Year <input type="checkbox"/> One Week <input type="checkbox"/> One Month <input type="checkbox"/> One Year <input type="checkbox"/> Two Years <input type="checkbox"/> Three Years <input type="checkbox"/> Four Years <input type="checkbox"/> Five Years <input type="checkbox"/> Ten Years	Price Min <input type="text"/> No Min Beds Min <input type="text"/> No Min Baths Min <input type="text"/> No Min Square Feet Min <input type="text"/> No Min Acres Min <input type="text"/> No Min Year Built <input type="text"/>	Price Max <input type="text"/> No Max Beds Max <input type="text"/> No Max Baths Max <input type="text"/> No Max Square Feet Max <input type="text"/> No Max Acres Max <input type="text"/> No Max Garages <input type="text"/>
Status <input type="checkbox"/> Active <input type="checkbox"/> Show <input type="checkbox"/> Deposit <input type="checkbox"/> Closed <input type="checkbox"/> Temp Off Market				

Note: only the previous 2 years of Closed listings are available in Portal searches.

After entering their criteria and clicking Apply, the Portal will display any matches. They can then save their search so they can re-run it at a later date. These saved searches are accessible by clicking **My Searches**:



As their agent, you can see if they have created any saved Portal searches by going to **My Matrix > Contacts** and looking for the **Portal Searches** section. It will show you the exact criteria they used in their search:

The screenshot shows a user interface for a real estate portal. At the top, the user is identified as 'Beaver Billy' with the email 'chris@smartmls.com'. There are three notification icons: a bell, a person, and a mail icon, with counts of 0, 3, and 11:19 AM respectively. Below this, there are two expandable sections: 'Portal Activity (3)' and 'Portal Searches (1)'. The 'Portal Searches (1)' section is highlighted in green and contains a search titled 'Billy's West Hartford Search'. This search is enclosed in a red rectangular box. Below the search title are two buttons: 'Results' and 'Open in Portal'. The search criteria are listed as follows: County is 'Hartford', City is 'Farmington', and 'West Hartford', Property Type is 'Single Family Sale', Style is 'Ranch', Status is 'Active', Status is 'Show', Status is 'Coming Soon', Status is 'Deposit', Status is 'Temp Off Market', Status is 'Closed', Status Search Date is 09/25/2016+, Beds Total is 3+, Beds Total is 3 or less, Baths Total is 2+, Baths Total is 2 or less, and Ordered by Property Type descending, Property Sub Type descending, City, Status, Current Price. Below the search criteria are three expandable sections: 'Saved Searches (2)', 'CMAs (1)', and 'Sent Email (6)'. At the bottom of the interface are five buttons: 'Edit Contact', 'Delete Contact', 'Start CMA', 'Open Portal', and 'Open Cart'.

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