

## Compatibility

### Matrix Desktop Compatibility

Matrix X is compatible with the latest browser versions supported by mainstream operating systems. Operating systems and browsers such as Windows XP, Windows Vista and Internet Explorer 8 and 9 (IE8, IE9) are no longer in mainstream support. Anyone using a previous version of these browsers will see a warning at login to encourage upgrading. Browser-related issues that can't be resolved by upgrading to the latest version will be reviewed and resolved on a priority and best-effort basis. CoreLogic will support upgrades to browsers as soon as reasonably practical following availability of the new browser version in new retail computers.

Matrix supports the following desktop browsers:

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

### Matrix Mobile Compatibility

iPad and Android tablet users should install the most recent version of their browser. Matrix Mobile supports the following browsers:

- iOS Safari
- iOS Chrome
- Android Browser
- Android Chrome

Defects reported against other mobile platforms will be fixed on a best-effort basis.

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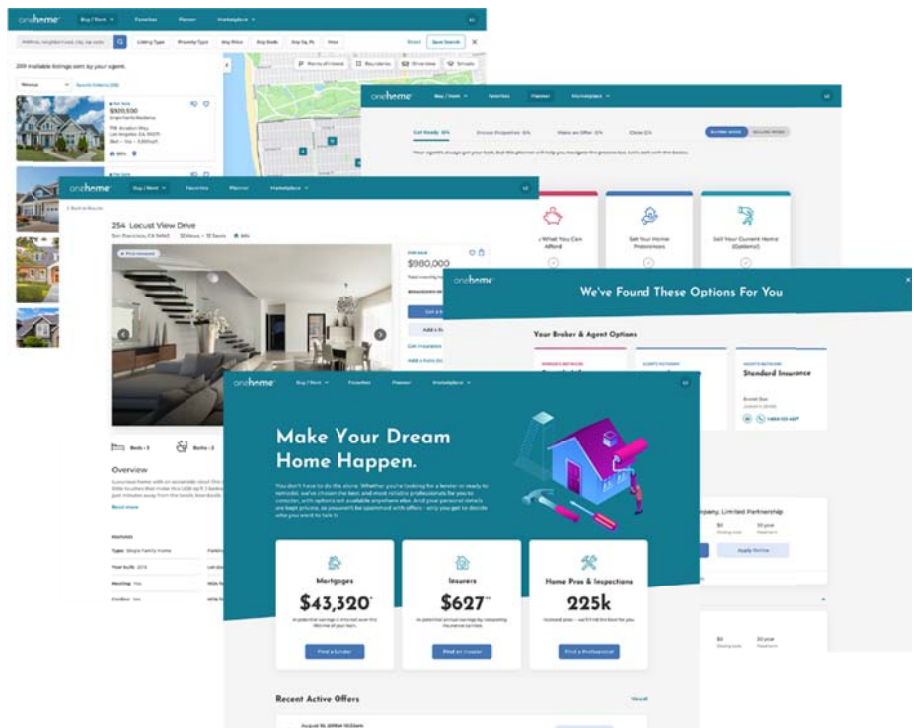
## New Features

### OneHome – The All New Customer Portal

Matrix™ X delivers an all-new experience for clients and prospects via the OneHome™ platform.

OneHome is the revamped Matrix member/consumer portal. OneHome provides your members a collaborative environment to help guide clients through the search, purchase, protection, and improvement of their new home. OneHome helps your members remain aligned with their clients throughout the entire home buying journey, including securing a mortgage and selecting an insurance policy to protect the home. OneHome features a lot more for both real estate agents and their clients. Here is what the new platform has to offer:

- **Planner:** Your clients can track the buying or selling process from start to finish and track their progress, so you'll know they're not missing a key step
- **PropertyFit™** - After answering a few simple questions, your clients will see how closely each listing matches what they're looking for at a glance. Plus, you get to see how their preferences change over time.
- **Search:** A new, client-friendly search tool that simplifies the process without sacrificing any of the functionalities Matrix has to offer.
- **Property Details:** All the data Matrix has available on a property, presented in a beautiful and easy-to-use new layout
- A **Marketplace** to help connect homebuyers with key services 3rd parties such as mortgage providers, insurers, and home service professionals. Agents & brokers can set preferred service providers for each of these.
- **Insights** into activities clients are taking throughout their real-estate journey including PropertyFit scores, consumer favorites and dislikes & Planner status.



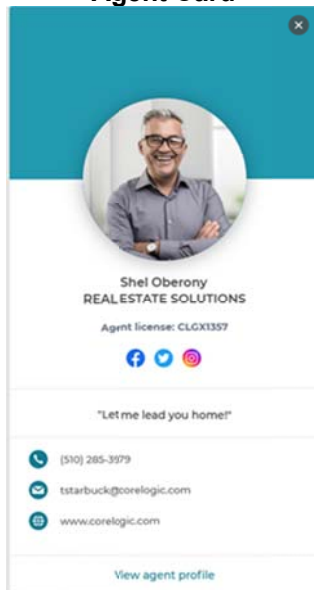
**NOTE: Requires configuration. Consumers will continue to use the existing Portal until an MLS-wide switch to use OneHome after the upgrade to Matrix X.**

## OneHome – Agent Profile [New in 10.5]

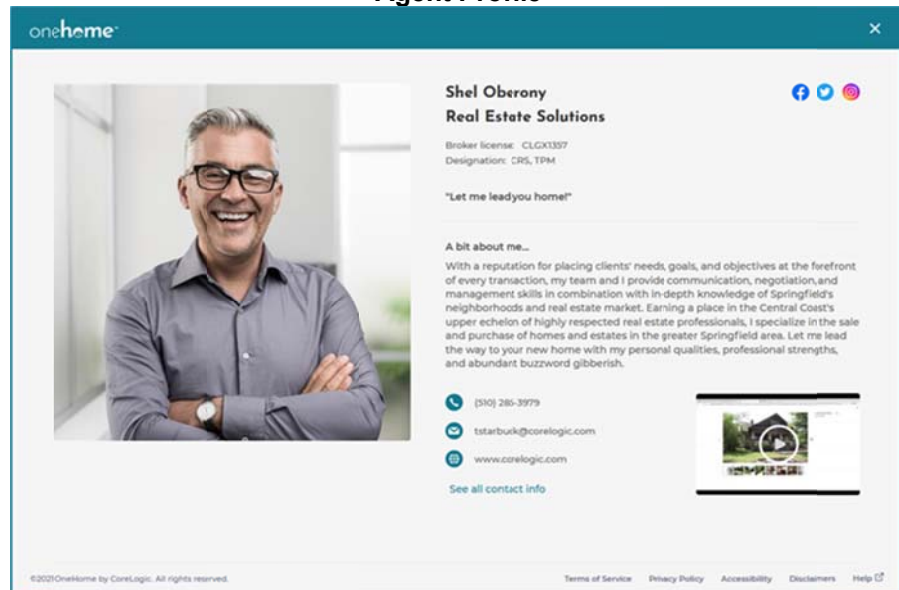
Each agent can configure their OneHome branding information from within Matrix via a OneHome tab in their “My Information” settings. This tab will appear when OneHome is enabled for the MLS, replacing the “Portal Profile” tab and associated Portal branding options. Branding information appears in three ways in OneHome:

1. **Agent Photo** - A small round photo in the bottom right corner of every page. If the agent has not uploaded a photo in Matrix to display in OneHome, their initials display in this circle instead. Clicking/tapping this circle displays the Agent Card.
2. **Agent Card** – displays a larger version of the same round photo, plus the agent’s name, company, and contact information. If the agent has both a photo and either profile content text or a video then their card will contain a link to view the agent profile.
3. **Agent Profile** – A full page profile which includes all promotional content the agent has configured to display, including personalized text and video.

Agent Card



Agent Profile



**NOTE: Customers who use OneHome prior to upgrading to v10.5 will want to urge their members to review and validate their OneHome branding settings in Matrix as soon as possible after that upgrade. The smaller agent photo used previously in OneHome will continue to be used until an agent updates their branding, at which time they will need to upload or select a larger photo.**

## OneHome in Matrix – Sending Listings via Text [New in 10.6]

Agents who use OneHome can now text listings to their clients directly from Matrix, as well as have Auto Emails send texts to notify the client of new and changed matches!

When an agent initially attempts to send listings to a contact via text they will be prompted to first send an Opt-In request which the contact must acknowledge and use to confirm their mobile phone number. Once the contact has opted in then the agent will see this reflected in their profile and be able to text listings to them.

**Email 3 Listings**

From: "Thomas Starbuck" <tstarbuck@marketlinx.com>  
To: Et'linques, Mark;  
CC:  
Create a New Contact  
☐ Bcc me a copy of this message.  
☒ Also send link via SMS text message  
Subject: Several listings you'll love!  
Email Body: Here are a few houses which just listed this morning. I think you'll really like them.

**Text listings when sending an email**

**Save a New Auto Email**

Recipients  
Contact: Et'linques, Mark  
To: tstarbuck@marketlinx.com (Et'linques, Mark)  
☐ Bcc me a copy of all emails.  
☒ Also send link via SMS text message  
Message  
Subject: Properties in Springfield  
Welcome Email | Recurring Email  
Salutation: Dear Mark Et'linques, Edit  
Message: I've set up a personal website for you to check out the properties I think you'll like. You'll be notified as I add new properties - just click the link!

**Text listings when sending an Auto Email -- including all updates**

**Each contact will need to Opt In to receive texts**

You can't send this by text message until tstarbuck@marketlinx.com opts in. **Send Opt-In**

**Mobile Phone Screens:**

- Screen 1:** "Get Property Alerts by Text Message" with "SIGN UP NOW" button.
- Screen 2:** "SMS Notifications" form with "Mobile Phone Number" field, "Enter phone number" label, "I agree to OneHome's Terms of Service and Privacy Policy" checkbox, and "Activate Text Message Notifications" button.
- Screen 3:** "Text message notifications are now active!" confirmation screen.

**NOTE: Requires configuration**

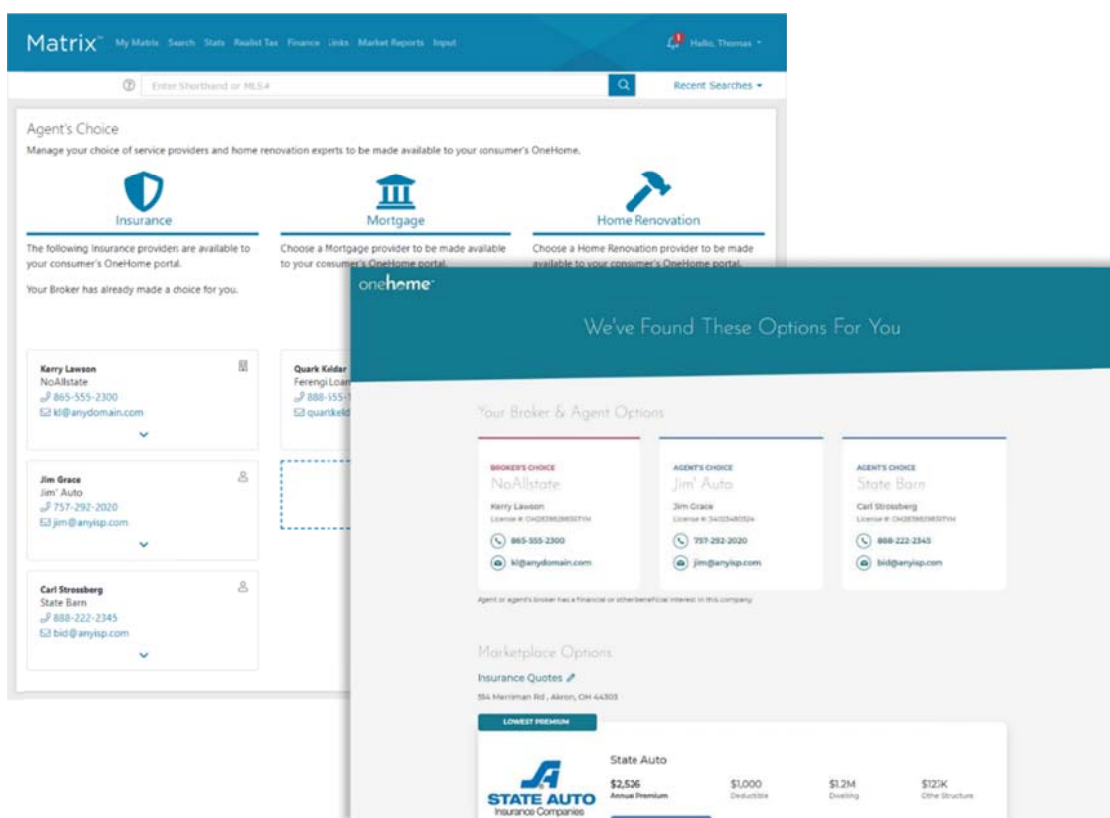
## OneHome in Matrix – Agent/Broker’s Choice Providers

Agents and brokers can share their preferred service providers with their contacts within the OneHome Marketplace. When exploring services in OneHome, contacts will see providers added by their agent and the agent's broker, along with the providers' phone number and email address. Service providers can be added via the Settings page for:

- Mortgage
- Insurance
- Inspectors & Home Professionals

Brokers can be granted the ability to opt in or out of the OneHome Marketplace on behalf of their agents. Each of the three Marketplace categories can be opted in/out separately, and if opted out that category will not be displayed in the Marketplace on OneHome for contacts of their agents. If all three categories are opted out then the Marketplace will not be available at all to those contacts. **[NEW IN 10.3]**

**NOTE: Requires configuration**



## OneHome in Matrix – Monitor the Activity of Each Contact

As part of the upgrade from the old Portal to the new OneHome platform, several new sections within the Contact's record provide the agent visibility into their use of OneHome.

- Property Fit preferences – see how the contact answered questions about their ideal property. These answers are displayed per-email address, giving the agent insight into possible differences of opinion between spouses, even though both are within a single contact record.
- Property Fit scores – when viewing listings associated to the contact (i.e. in “goggles” mode) the Property Fit score of each listing is displayed, again per-email address for those contacts who are more than just one person.
- Planner status/activity – see which buyer- and/or seller-related activities each contact has marked off their checklist
- Just as previously, you can still:
  - View Favorites & Discards
    - All listings previously designated as Possibilities are now Favorites; OneHome simplifies the consumer experience with only a single positive (Favorite) or negative (Discard) category
  - View notes
  - View a log of recent activity – including Planner activity
  - View searches saved by the contact
  - Receive notifications via email or text of these activities

The screenshot displays the OneHome user interface with three main panels:

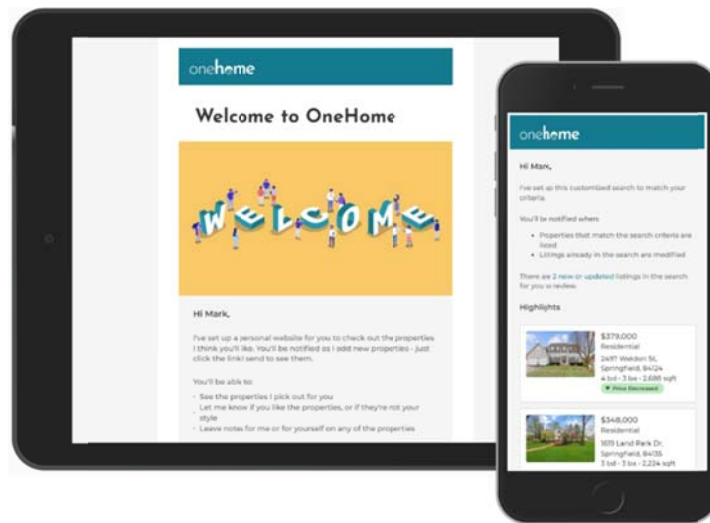
- Planner Buy mode:** A checklist of tasks. Under "Get Ready", "Get to know the process", "Know what you can afford", and "Set your home preferences" are marked with green checkmarks, while "Sell your current home" is marked with an 'X'. Under "Browse Listings", "Look into your finances" and "Dive into your home search" are marked with green checkmarks, "Tour some properties" is marked with a radio button, and "Start thinking about other options" is marked with a green checkmark.
- PropertyFit:** A section for property preferences. It includes "What describes you best?" with five options: "I'm happy staying indoors", "Open concept isn't for me", "I need a garage or driveway for my car", "I want an environmentally low-impact home", and "I don't mind being close to my neighbors". Below this are "Interior Features" (fireplace, hardwood flooring, granite counters) and "Exterior Features" (pool, patio, waterfront), each with a set of three toggle buttons.
- Recent Activity:** A log of user actions. It shows "Checked: Know budget" (12:39 PM), "Checked: Get to know the process" (12:39 PM), and "Checked: First visit" (12:39 PM). It also shows "Added 1 favorite" (05/11/2020) and "Discarded 1 listing" (04/29/2020). At the bottom, it says "Last Visited 04/29/2020".



## OneHome in Matrix – Modern Appearance for Emails

Emails sent to consumers have been updated with clean, modern designs tailored to match the look and feel of the OneHome system, ensuring MLS members promote a professional presence while providing clients and prospects a uniform experience.

**NOTE: Requires configuration.**



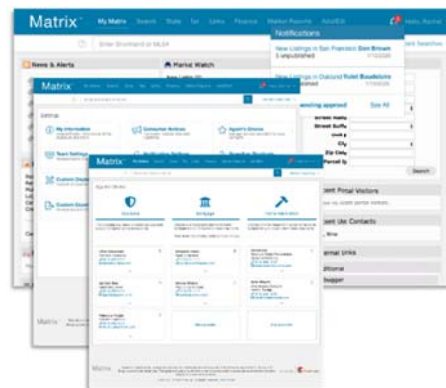
## OneHome in Matrix – Miscellaneous Changes

Several minor changes within Matrix take effect when the system is switched to use the OneHome platform instead of the Portal.

- Agent Header
  - The Agent Header is now only used as a Print Header. This change is reflected within the “Header & Footer” tab of the agent’s “My Information” settings. The user may still configure their banner, mugshot, branding, and colors just as before, but only a print-width preview of each header is shown.
- Emailed content other than listings
  - The ability to email Open Houses is no longer supported with Matrix X.
  - Driving directions, statistics, Hit Counter charts, and net sheets may still be emailed but will not display within OneHome. Instead, they will display as they did previously on the Portal, but without any agent header or navigation. Just the content.
  - CMAs and other PDFs can continue to be emailed and will display just as they always have.

## Modern UI

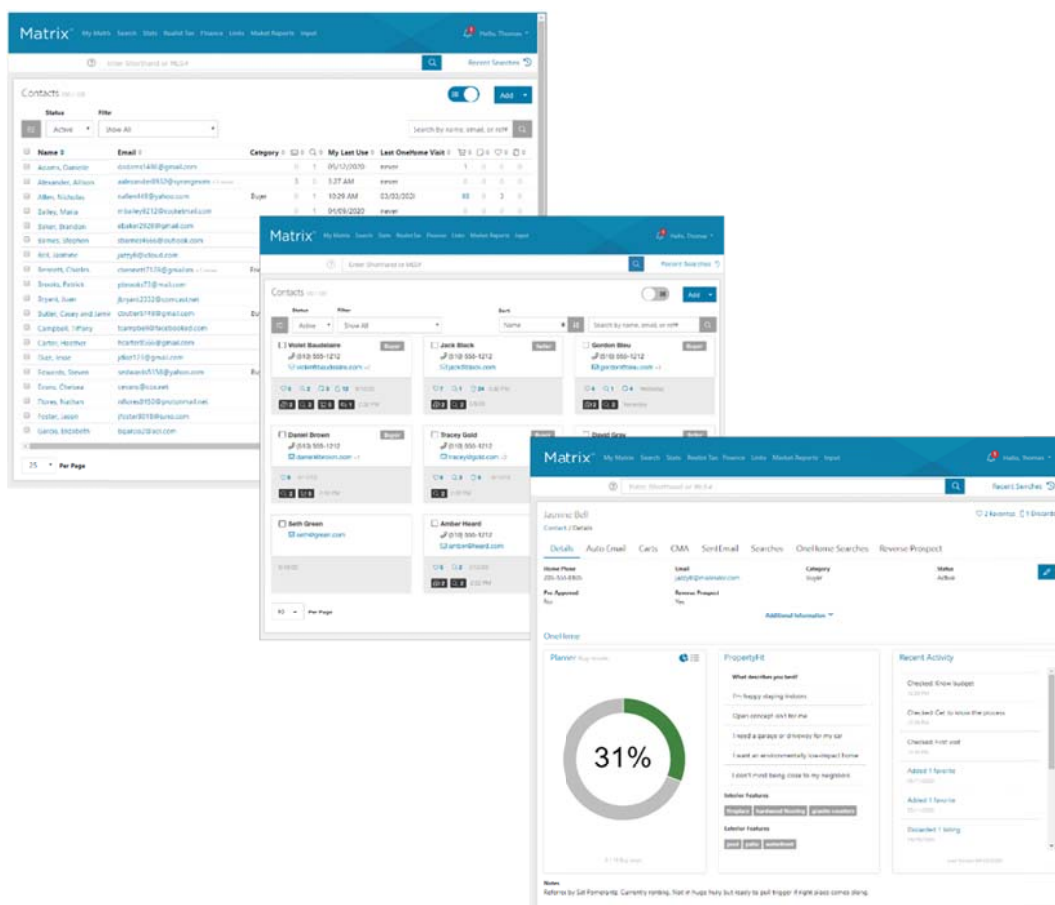
The look and feel of Matrix now combines modern color pallets, iconography, navigation, and state of the art design. Some aspects of the new UI are global changes visible on every page, while more comprehensive changes are isolated to specific modules as noted below.



## Modern UI – Contacts

The Contacts module has received a fresh new look in Matrix X as the latest step in our incremental approach to providing a clean new UI across the entire application. By employing best-practice standards of webpage design while retaining all the core Matrix functionality and performance to which users are familiar, this new UI maximizes the user experience while minimizing any need for retraining.

- Contact List - Existing functionality redesigned for improved readability and accessibility.
- Gallery View – An alternate way to view all contacts and see core information and activity at a glance.
- Contact Details - Each contact's record has been expanded from its old accordion-style format to become a new, dedicated page. Multiple tabs provide accessibility to various information within the contact profile, and new widgets provide insights into the contact's use of OneHome.



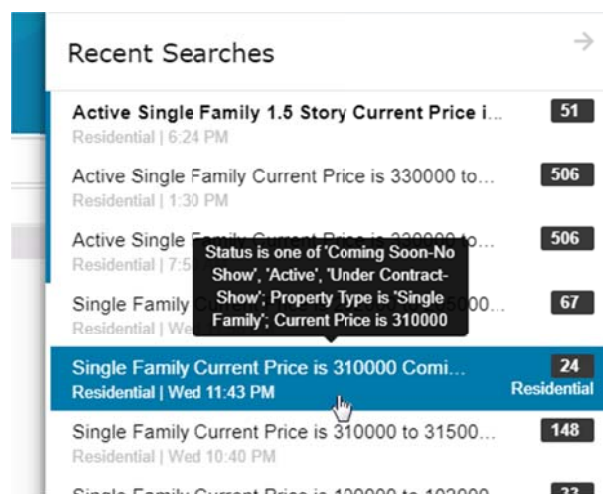
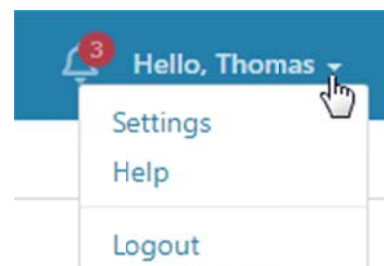
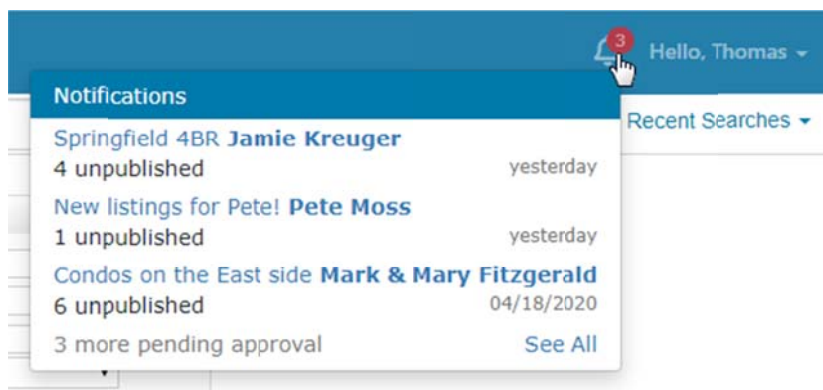


## Modern UI – Header, Navigation Bar, and Recent Searches

The global header has been updated in Matrix X, getting its first facelift in years. Beyond the clean, new look of the header and Speed Bar, several meaningful changes have been made to the navigation menu.

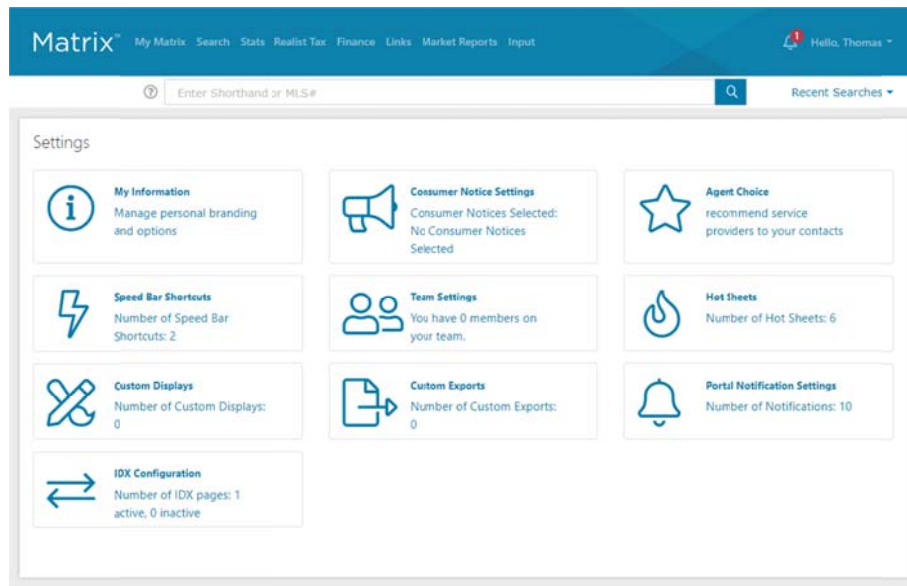
- A new “Notifications” icon on the right, providing a central location for alerting the user to important information consistent accepted standards of modern website design. In Matrix X, alerts of new Concierge matches have been moved into this control, and future releases will see additional notifications placed here as well.
- A new “utility menu” under the user’s name providing access to their personal settings and other tools. This is part of a multi-phase plan to modernize Matrix to feel familiar to users of any website: tools are placed where they are most commonly found elsewhere, thus increasing natural, intuitiveness of the application.
  - While this menu is configurable and only the Logout and Team Member switching controls have moved here by default, we recommend moving Settings, Admin, and Help under this menu concurrent with the upgrade to Matrix X.
- The Recent Searches list has been updated with a fresh look as part of our mobile-oriented mindset for providing Matrix users the best experience possible regardless of which device they use.

NOTE: Separate but nearly identical versions of the new header exist on the “new UI” pages (Contacts, Settings) and on all pre-existing pages. Minor discrepancies may be observed but users should notice no material differences between the two versions except on phone-sized screens where the navigation bar on the new UI pages collapses into a mobile-friendly menu.



## Modern UI – Settings

In conjunction with moving access to user-level settings to the user's Utility Menu, the Settings page itself has been given a new look showcasing the future direction of the platform. The same options as before are available, just with a modern interface.



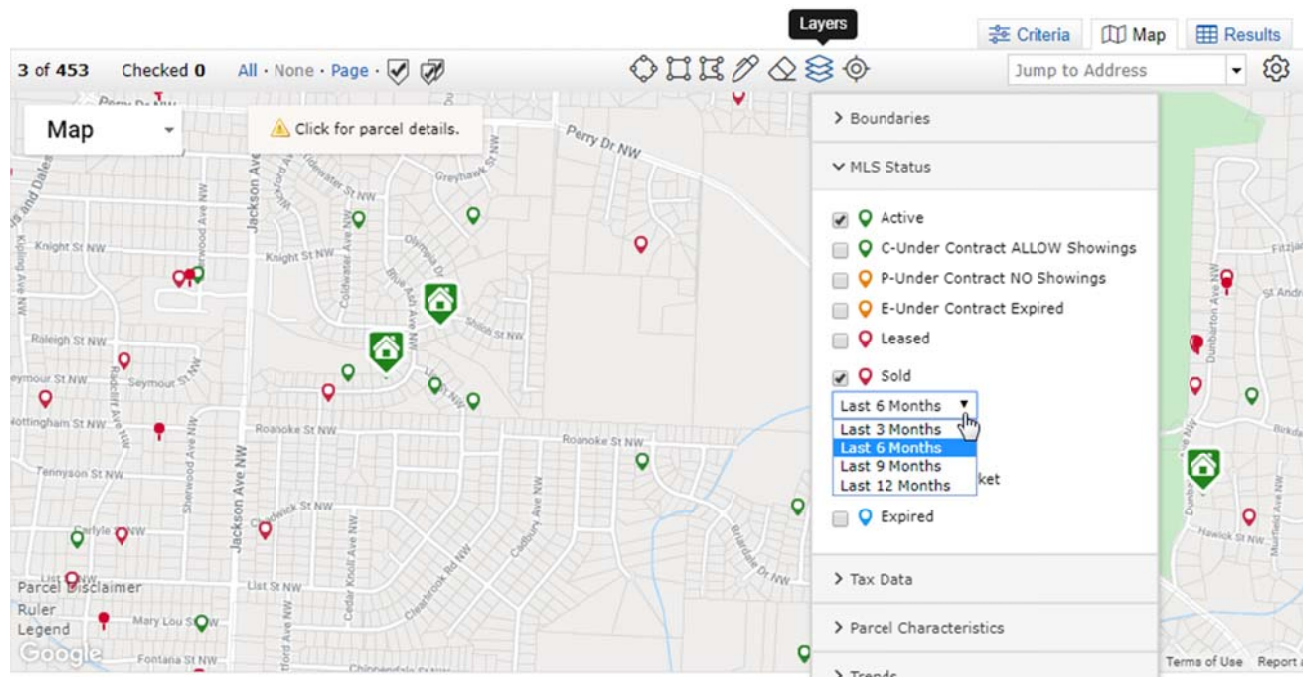
## New Map Layers in Matrix 360

Matrix 360 now offers a set of new map layers which provide immediate visualization across the entire market by displaying a small color-coded pin within the parcel of all properties of a certain status, regardless of the current search criteria. Layers are available at the same zoom levels which display parcel boundaries, and each pin can be clicked to view relevant information just as when clicking in the parcel.

For example, while browsing new Hot Sheet listings on the map, turn on the layer of recent Sold listings to quickly gauge relative urgency and value in that area. Turn on recent Tax Sales to view additional properties which have sold outside the MLS, all without leaving the map!

- Listing Status layers
  - Each listing status can now be visualized as a layer on the map. Because the layer is the same for all members it should not be used for statuses such as Incomplete for which all listings are not available to all members. Permanent statuses such as Sold and Expired are filtered to only show recent listings.
- Tax Sale layers
  - A pin can be displayed to mark each property which has a recent sale recorded in public records data, and a separate layer can be used to mark only those properties with such a recent sale recorded for which no corresponding sale is found in listing data, e.g. FSBOs and other non-MLS transactions.
- Distressed Property layers
  - The same layers configured in Realist to identify properties in foreclosure or a recent distressed sale can now be made available in Matrix.

**NOTE: Requires Matrix 360; requires configuration**



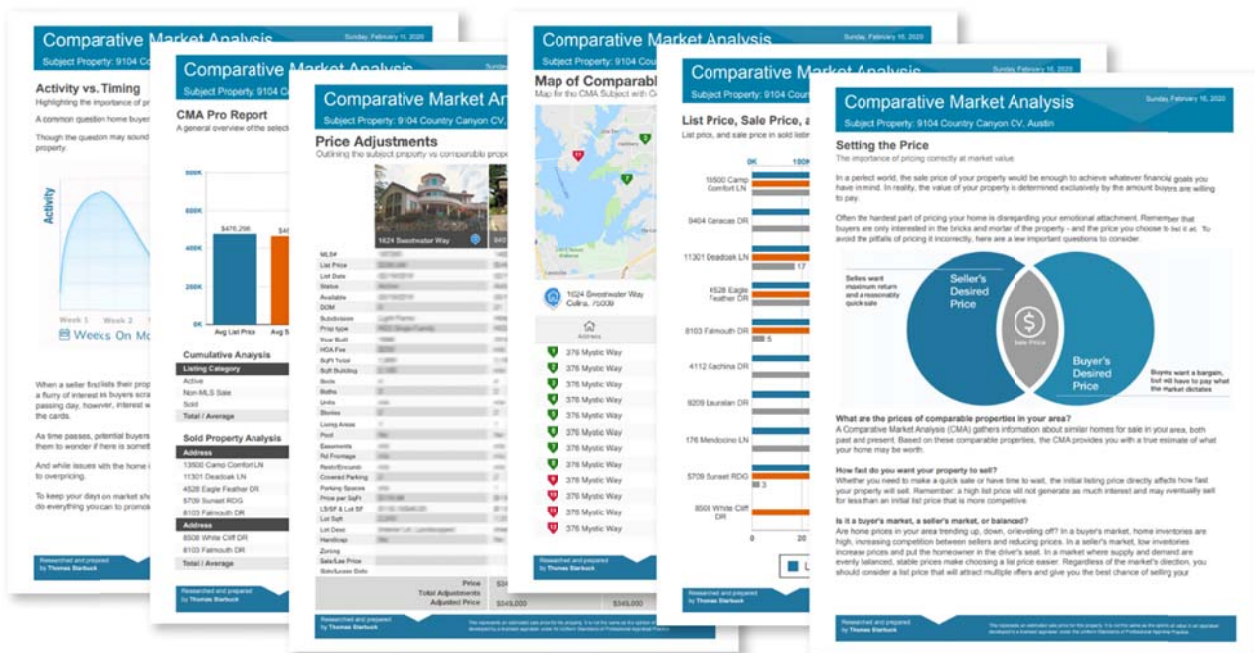
## 360° CMA – A Complete View of the Entire Market

Listing and Tax data is combined into a single searchable table containing the latest data for each property in the MLS market. This allows an agent to easily generate a CMA which includes comparables of not just listings, but also recent sales made outside the MLS.

Additional key benefits of this exciting new feature include:

- Quick and Easy – automatically generate 360 Comps with a single click from any property in the system. Twenty comparable properties selected for their proximity and similarity which are current or recent listings or sales, help instantly provide a value guideline.
- Classy and Professional – all report pages within the 360° CMA share a consistent, modern design. Overall content mirrors the existing Matrix CMA, but with a fresh, clean look.
- Complete – Not only are the comparables pulled from both listing and non-MLS sales, the data shown for each property can include a mix of listing and tax data, providing a broader view of property information.

**NOTE: Requires configuration; available only to US customers with Realist**





## Image Captions & RestB.ai Integration [New in 10.6]






Listing images in Matrix can now be tagged with a caption based on RESO's standardized "ImageOf" values, and via optional integration with RestB.ai these values can be auto-filled when the agent uploads photos. When enabling Captions the MLS may decide whether to make them required or optional. At this time caption values are not displayed elsewhere in Matrix when viewing images, allowing time for a critical mass of images to receive tags before such enhancements are made. Captions may be exposed via RETS.

**Add / Edit Photos for MLS#3612093**

To upload, click Browse. To upload Multiple photos at once, hold the Ctrl (Option) key down when clicking on the filenames. To Order your photos once uploaded, drag by the grey title bar. Click on any image to view its Details.

To Order your photos once uploaded, drag by the grey title bar. Click on any image to view its Details. For maximum quality, upload photos at least 1024 x 768 pixels in size.

☐ Check All

<input type="checkbox"/> Primary slot*	<input type="checkbox"/> Slot: 2*	<input type="checkbox"/> Slot: 3*	<input type="checkbox"/> Slot: 4*	<input type="checkbox"/> Slot: 5*
				
Front of Structure The nicest house on the street in highly	Living Room Enter description...	Living Room Enter description...	Select Caption... Enter description...	Select Caption... Select Caption... Aerial View Atrium Attic Back of Structure Balcony Bar Barn Basement Bathroom Bedroom Bonus Room Breakfast Area Closet Community Courtyard Deck Den Dining Area Dining Room

Descriptions can now be entered directly on this page

Captions can be selected individually, or populated via automated image analysis

**NOTE:** The addition of the Description field to the image management screen is standard and immediately available, while the presence of the Caption field requires configuration. Integration with RestB.ai to auto-suggest Caption values required a separate agreement.

