



Version 6.7.6 Release Notes

Reverse Prospecting Enhancements

There are a number of improvements that have been made to the Reverse Prospecting module in RCO3® (aka Matrix v6.7) that enhance its usability and email capabilities.

My RCO > My Listings > Reverse Prospecting



These agents each have a contact who has received this listing. Click the agent name to email them about your listing. They can identify the contact via the Reference # by looking it up on their Contacts page. Count is the total number of listings each contact has been sent.

153 Sierra Vista DR

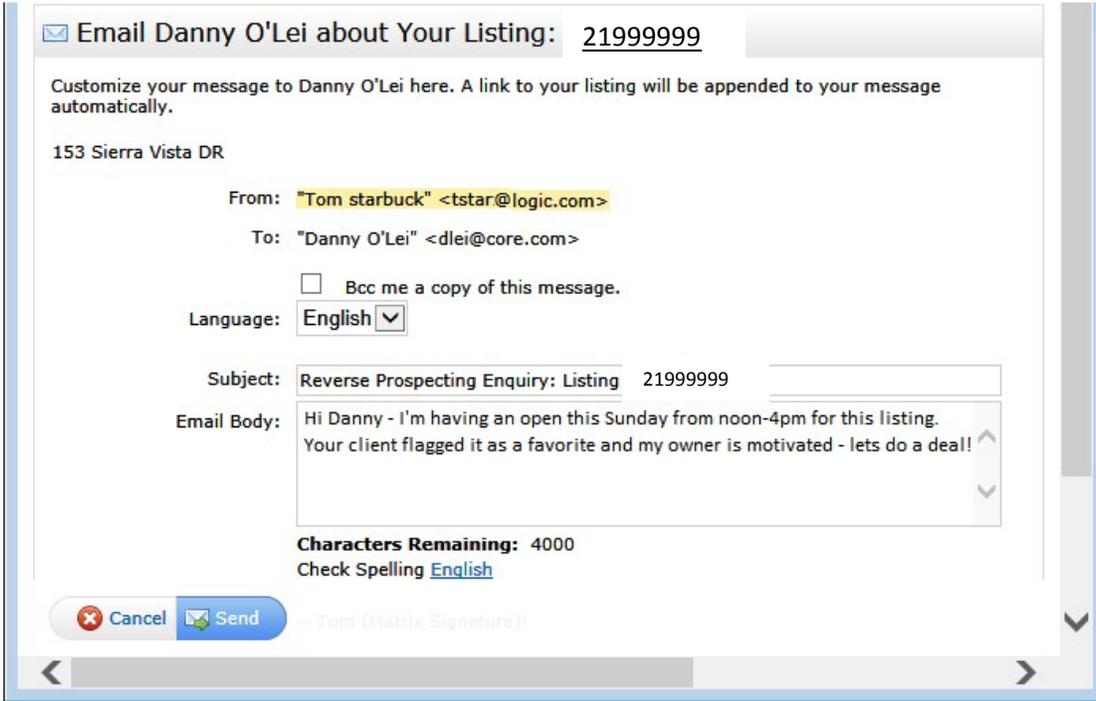
| Agent | Ref # | Pre-approved? | Count | Date Sent | | Email Address |
|-------------------------------|-------|---------------|-------|-----------|---|-------------------|
| Dave Woodcock | 39732 | ✓ | 166 | 3/28/2013 | ♥ | dwoodcock@corel |
| Danny O'Lei | 39734 | ✓ | 65 | 9/19/2013 | | dlei@corelogic.co |
| Danny O'Lei | 39782 | ✓ | 110 | 9/23/2013 | 💡 | dlei@corelogic.co |

[Return to My Listings](#)

- **Sortable Columns** – click on the column headers to sort results.
- **Agent Name** – click on the Agent Name to send an email (*See Reverse Prospect Email below*)
- **Pre-Approved Flag** – displays a checkmark if the contact has Mortgage Pre-approval. The agent sets this flag for each of his contacts.
- **Date Sent** – indicates when the contact was notified of your listing
- **File Folder Icon** -
 - Heart ♥ icon will be displayed if the referenced contact flagged your listing as a Favorite
 - Light Bulb 💡 icon will be displayed if contact flagged your listing as a Possibility
 - If the contact discarded your listing – that contact's Agent and Reference Number row will not appear in Reverse Prospecting Results

Reverse Prospect Email Page

From the Reverse Prospecting Results screen (*shown on previous page*), you can click on the Agent's Name link in order to send an email to the buying agent for the contact referenced.



The screenshot shows an email composition interface. At the top, there is a header bar with a checkmark icon and the text "Email Danny O'Lei about Your Listing: 21999999". Below this, a message says "Customize your message to Danny O'Lei here. A link to your listing will be appended to your message automatically." The address "153 Sierra Vista DR" is listed. The "From" field is "Tom starbuck" <tstar@logic.com> and the "To" field is "Danny O'Lei" <dlei@core.com>. There is a checkbox for "Bcc me a copy of this message." and a language dropdown menu set to "English". The "Subject" field contains "Reverse Prospecting Enquiry: Listing 21999999". The "Email Body" field contains the text: "Hi Danny - I'm having an open this Sunday from noon-4pm for this listing. Your client flagged it as a favorite and my owner is motivated - lets do a deal!". Below the body field, it says "Characters Remaining: 4000" and "Check Spelling English". At the bottom, there are "Cancel" and "Send" buttons, and a signature line that reads "Tom (Matrix Signature)".

Important Side Note: Reverse Prospect e-mails can only be sent through RCO3® on an individual basis. Reverse Prospect e-mails in mass are intentionally not a function of this system due to SPAM-related ramifications.

Reverse Prospect Email History

All Reverse Prospecting emails sent and received are saved in Reverse Prospect History. History is accessed from **My RCO > Contacts > [Contact Name] > Received Reverse Prospect History**. The top section displays all reverse prospecting emails Sent, and the lower section displays all reverse prospecting emails Received.

My Listings

Sent Reverse Prospect History (2)

Search: Filter: ... choose a filter

| <input type="checkbox"/> | Listing | Ref# | Recipient | Date Sent | Date Viewed |
|--|--------------------------|-------|-------------|------------|-------------|
| <input type="checkbox"/> | 21999999 | 39734 | Danny O'Lei | 2:43 PM | never |
| <p>To: 456638 Subject: Reverse Prospecting Enquiry: Listing E702658 Hi Danny - I'm having an open this Sunday from noon-4pm for this listing. Your client flagged it as a favorite and my owner is motivated - lets do a deal!</p> | | | | | |
| <input type="checkbox"/> | 21888888 | 39706 | Dan Davies | 11/27/2013 | never |

Received Reverse Prospect History (2)

Search: Filter: ... choose a filter

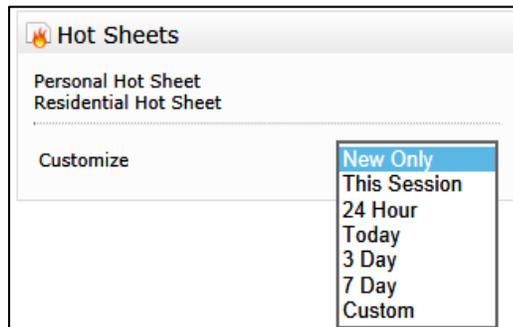
| <input type="checkbox"/> | Listing | Contact Name | Sender | Date Sent | Date Viewed |
|--------------------------|--------------------------|-------------------------------|----------------|------------|-------------|
| <input type="checkbox"/> | 21977777 | Lahjic, Corey | Karla Ferrando | 1/6/2014 | never |
| <input type="checkbox"/> | 21977777 | Lahjic, Corey | Karla Ferrando | 12/19/2013 | never |

- **Listing #** – click to view the message sent/received.
- **Ref#** – Reference number the receiving agent uses to lookup his contact while keeping the contact's name confidential.
- **Recipient** – name of the agent the email was sent too.
- **Date Sent** – Date the email was sent. Displays the Time if sent today.
- **Date Viewed** – Displays the date of when the receiving agent read the email, "never" indicates unread.
- **Contact Name** – Click to display your contact's detailed information. Contact's name is only visible for Received Reverse Prospecting Emails.

Hot Sheet Enhancements

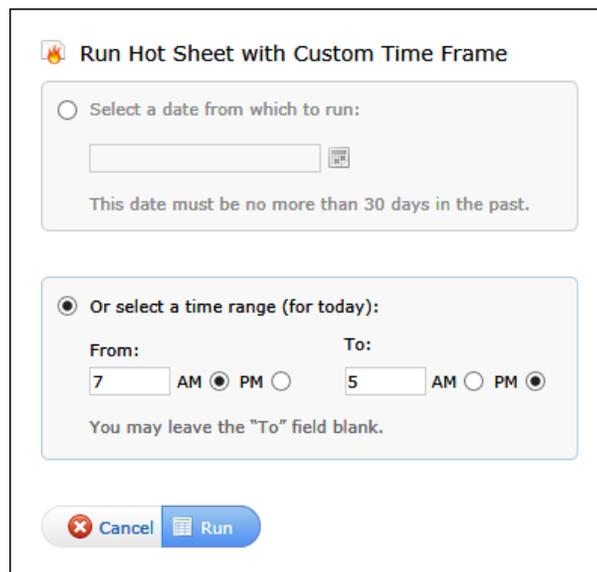
Rather than save a “Days Back” setting separately for each Hot Sheet in the criteria page, in RCO3® v6.7 the user now sets the “Days Back” on the home page when running the Hot Sheet.

Additionally, you now have the option of adding multiple (up to 10) customized Hot Sheets to the system.

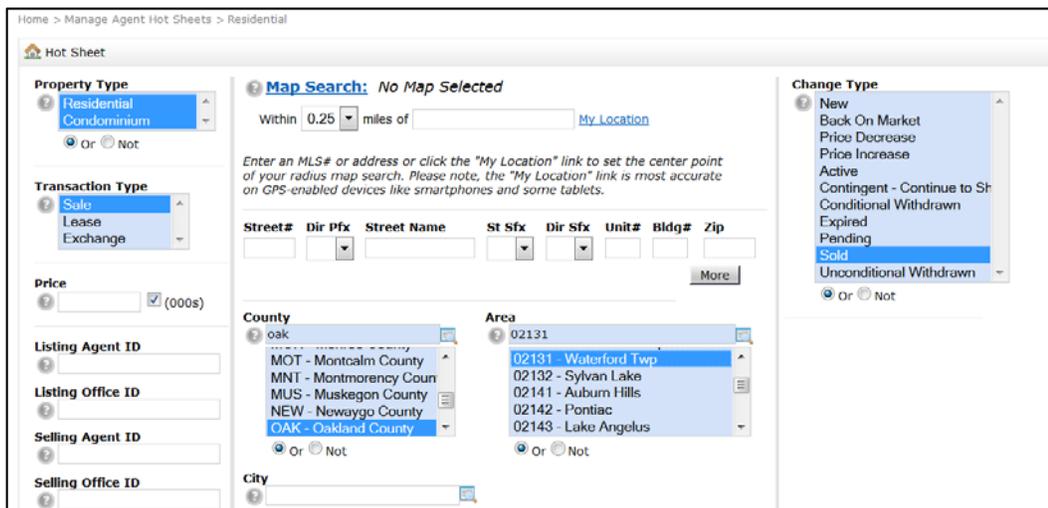
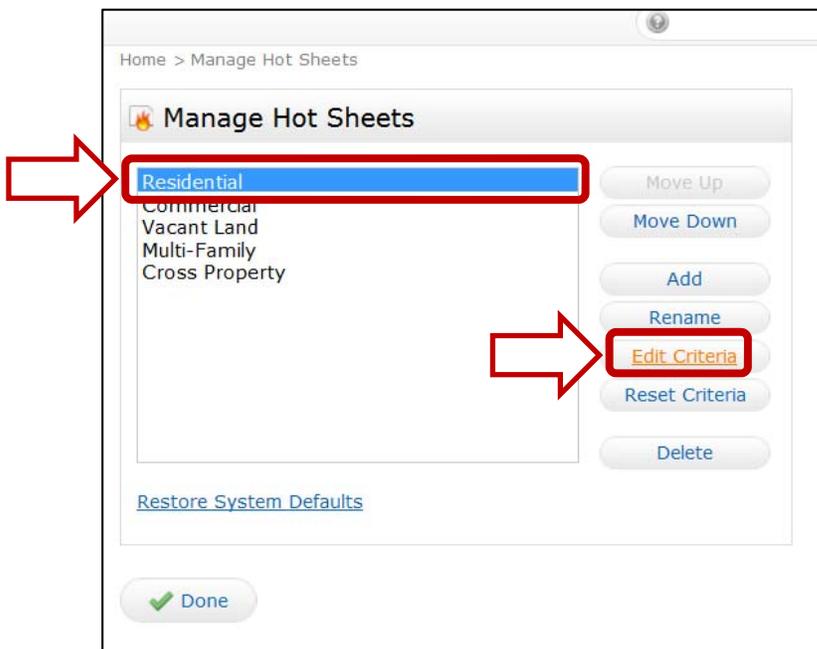
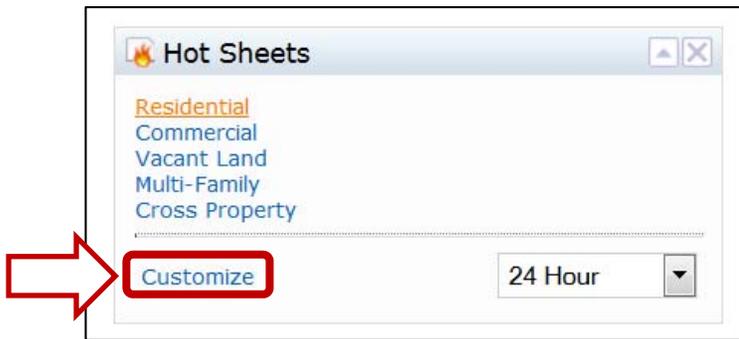


The menu of ‘Days Back’ options includes the following:

- **New Only** – only shows listings which are New/Changed since the last time the user ran a hot sheet. For example: if a user logs in at 9:00 AM and runs the Hot Sheet, then later within that same session runs it again, this option would show only listings new/changed since 9:00 AM.
- **This Session** – only shows listings which are New/Changed since the last time the user ran the Hot Sheet in a prior session. For example, if a user logs in at 9:00 AM and runs the Hot Sheet and sees 50 listings, then later within that same session runs it again, this option would show them those same 50 listings *plus* any new/changed since 9:00 AM.
- **24 Hour, Today, 3 Days, 7 Days** - only shows listings which are new/changed in the specified time frame.
- **Custom** – allows the user to set a custom date or time range (for the current date) from which to run within the last 30 days.

A screenshot of a dialog box titled "Run Hot Sheet with Custom Time Frame". It has two radio button options. The first is "Select a date from which to run:" with a date input field and a calendar icon. Below it is the text "This date must be no more than 30 days in the past." The second option is "Or select a time range (for today):" which is selected. It has "From:" and "To:" labels. The "From:" field has "7" and "AM" selected. The "To:" field has "5" and "PM" selected. Below these is the text "You may leave the 'To' field blank." At the bottom are "Cancel" and "Run" buttons.

Users can create up to 10 custom Hot Sheets each with criteria using the **Hot Sheet Manager**. Access the Hot Sheet Manager by clicking on the Customize link in the Hot Sheet gadget, or alternately from **My RCO > Settings > Hot Sheets**.



Note: With this new feature, the old Days Back criteria box is no longer needed – thus, it no longer displays on the screen to the left.

Lot Dimensions Enhancements

The Map display in RCO3® now has a “Lot Dimensions” link on the summary display that will show both the lot dimensions and lot size for the current property. The link will be visible for both MLS-listed and non-listed properties.

When viewing a map display, zoom in to the parcel line view. Click on a parcel to get more information about that property. When available, you will see data from the public records database displayed.



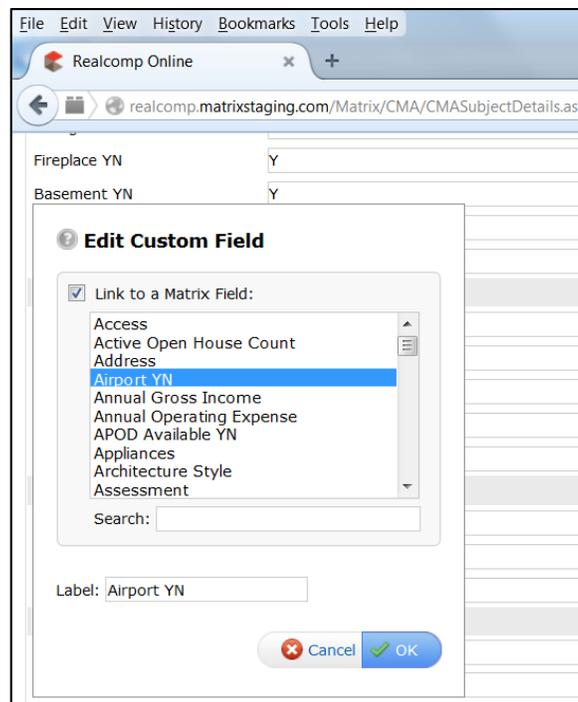
Click on the “Lot Dimensions” hyperlink to see the estimated lot dimensions display. All of this data is pulled from Realist.

NOTE: this feature is only available for CoreLogic customers with Matrix and REALIST.

CMA Enhancements

Custom fields allow you to make adjustments on additional property attributes besides those already shown on the Subject Property screen.

Each custom field now has the option of being *linked* to a field in the RCO3® database. If the custom field is linked to a field, those values will be used for comparison between the Subject Property and the Comparable Property. These fields can also be renamed as you would like to see them noted in your CMA. You can still create your own custom fields not linked to a RCO3® database field, in which case you must enter the values for each comparable on the Adjustments page.



Users can save their custom CMA fields for use in future CMAs. Custom fields can be added, modified or deleted for a particular CMA, if required. The number of Custom CMA Fields users can be modified by Realcomp.

Additionally, the CMA module has been enhanced to also include these items:

- In the Email CMA screen, the **Send** button is now moved to a button bar at the bottom of the screen

- The search criteria used to find CMA comparable listings is now saved with each CMA created. When users want to add additional comparable listings to a CMA, the previously used criteria can be reused or modified.
- **Count-on the fly** has been added to the Search for Comparables screen (shown below).

Search for Comparables

Status - Date or Range

- Active
- Contingent - CCS
- Expired
- Pending 0-90
- Sold 0-90
- Cond Withdrawn
- Uncond Withdrawn

Property Type

- Residential
- Condominium

Or Not

Map Search: No Map Selected

Within 0.25 miles of [My Location](#)

Enter an MLS# or address or click the "My Location" link to set the center point of your radius map search. Please note, the "My Location" link is most accurate on GPS-enabled devices like smartphones and some tablets.

****Both Listing Type and Level Of Service are required fields****

Listing Type

- Exclusive Right to Sell
- Exclusive Agency
- Unknown (Data Share Listing)

Level Of Service

- Full Service
- Limited Service
- MLS Entry Only
- Unknown/Data Share Listing

****We do not receive Listing Type information for some data share listings.****

****We do not receive Level of Service information for some data share listings.****

Address Search

Street# Dir Pfx Street Name St Sfx Dir Sfx Unit# Bldg# Zip

28 matches

- **Important Side Note:** The link at the bottom of the search results screen that enables users to search for additional comps has been renamed - from “Search for Comparables” to “Add from Listings”. This new verbiage is now consistent with the other option which allows users to “Add from Cart”.

Issues Resolved

With the release of this particular version of RCO3®, approximately 75 bug fixes and enhancements were applied to the MLS system. We've listed the high profile items below:

| ID | Function | Description |
|------|--------------|--|
| 1081 | Auto E-mail | Auto Emails Taking a Long Time to Send – fixed. |
| 1019 | Client Flyer | Flyer is missing “presented by” lines at bottom of report – fixed. |
| 349 | CMA | CMA: no price per unit for sq. ft. – fixed. |
| 637 | CMA | Feature values not available for all adjustment fields – fixed. |
| 8264 | Contacts | Allow agents to select Inactive contacts from the Select Contacts popup when saving a new auto email – fixed. |
| 8375 | Contacts | Enhancement: Ability to search Contacts by email address. |
| 8135 | Email | Important: In order to support the recent email security policy changes made by Yahoo and AOL to their DMARC settings, the From address on all emails sent from Matrix will now be the Matrix System Email address. This mean contacts receiving emails sent from Matrix will see the From address display as: <Agent’s Name> postmaster@matrixemailer.com instead of the agents’ personal email address. Note: The REPLY TO will remain the agent’s personal email address. |
| 8260 | Email | Enhancement: Added Edit Signature link to Reverse Prospecting screen. |
| n/a | Home Page | Recent Portal Visitors widget on Home Page now logs date when a user visits their Mobile Portal site. |
| 7804 | Home Page | My Listings widget queries can now be removed from the Mobile Portal view without being removed from the RCO3® home page – fixed. |
| n/a | Mapping | Icons for checked pins are now darker blue for improved contrast. |
| n/a | Mobile | Clients were unable to save searches. |
| 8335 | Mobile | Windows phones are now detected as “mobile” devices so will automatically display the mobile versions of Matrix and the Portal. |
| 740 | Photo | Not able to upload photo from iPad – fixed. |
| 8289 | Photo | Enhancement: Photo captions now display two lines of text by default instead of just one in the Photo Viewer and expand when clicked if more than two lines; Listing displays with images can now be configured to display the full photo caption under each photo rather than just one line. |
| 8268 | Portal | When using Safari on iPads the Portal footer text is no longer cutoff – fixed. |
| 8145 | Printing | Enhancement: Added Print button to the My Listings page |
| 7553 | Printing | Printing PDF reports that contained large numbers of listings and images could cause timeouts due to the size of the PDF generated – fixed. |
| 7863 | Printing | When printing a large number of pages, the size of the PDF generated could be very large and exceed the buffer size resulting in pages not printing – fixed. |
| 7870 | Search | The photo caption bar is now visible in the photo viewer when listing only has 1 photo – fixed. |
| 8293 | Search | Enhancement: Added New Contact button to Results page |
| 753 | Seller Net | Seller Net Sheet - No header printed – fixed. |
| 490 | Speedbar | Enhancement: Add Speedbar search for School District -- type SCHOOL and School Name into bar (i.e. SCHOOL Milan). |