



# The Portal 7.0

Quick Start Guide



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# Your Portal

## Responsive Design

- Whether viewing your content from a desktop, laptop, tablet or mobile phone, your Portal will automatically adjust to the dimensions of whatever device you're accessing it from.

## Accessing your Portal

- Sign in** to the application (i.e. Outlook, Gmail, Hotmail etc.) where you are currently receiving email from your agent.
- Open the notification message** from your agent.
- Click this link to **open your Portal**.

**Note:** your Portal is HTML-based, which means there's no special app to download to your mobile device.

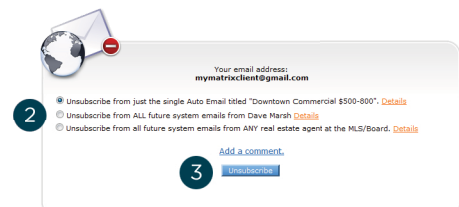
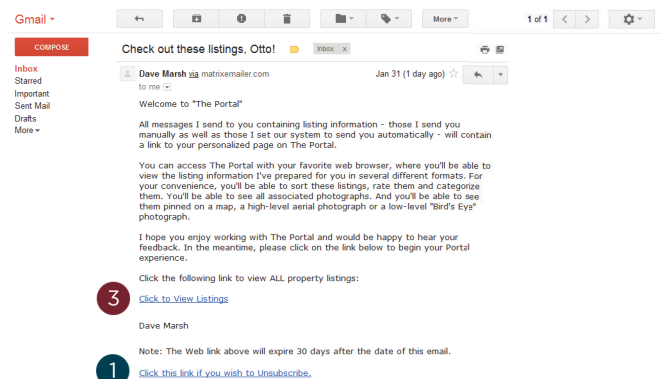
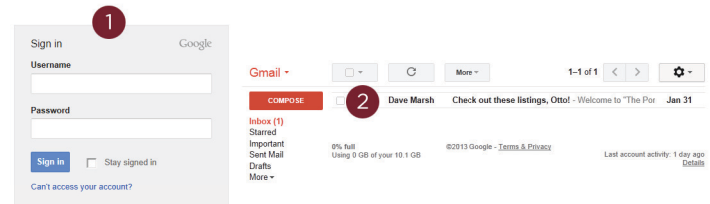
**Note:** for even quicker access in the future, you might also consider Bookmarking your Portal from your favorite browser.

## Unsubscribe

- Click the, "unsubscribe" link in the email notification to **open your unsubscribe options**.
- Select an option.**
  - Option 1:** select this option to unsubscribe from the Auto Email that you are currently being notified of.
  - Option 2:** select this option to unsubscribe from all email sent from the agent currently notifying you.
  - Option 3:** select this option to unsubscribe from all email sent by any agent.
- Click the **unsubscribe button**.

**Note:** when you unsubscribe from an Agent, an, "opt-in" email address will appear (usually in the form of, "optin.NAME@matrixemailer.com" where, "NAME" represents something unique). Copy this entire email address and store it for when you would like to opt back in sometime in the future.

**Note:** a message confirming that you have unsubscribed will automatically be sent to your agent.





## Listing Displays

- 1 Properties can be viewed, in a variety of ways, by selecting how you would like your listings displayed.

**Note:** by default, listings in the Portal will display in, “Map View”.

**Note:** see, “View Full Display” in the, “Find a Home” section of this Guide for functionality shared among Displays.

### Map View

- 1a Click the, “Map View” button to display the map together with a corresponding thumbnail list of limited property details.

### List View

- 1b Click the, “List View” button to display a thumbnail list with limited property details.

### Gallery View

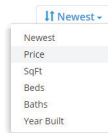
- 1c Click the, “Gallery View” button to display a thumbnail gallery with limited property details.

### Additional Views

- 1d Click the, “ellipses” option to display a dropdown list of any additional views that may be included.

## Changing the Order

- 1 Choose the order that you would like your results displayed by selecting a field from the associated dropdown list.



**Note:** reselect the same field to reverse the order (ie. click, “Price” once for highest price to lowest price then again for lowest price to highest price).

## View Full Display

- 1 From your results, click the, “Full Display” link in the property details section to **open the Full Display** and view additional information about the selected listing.

**Note:** link may be represented as an address, a listing number etc.

- 2 Click the, “Property Photo” to open the photo modal pop-up viewer.

- 2a Click the, “photo thumbnail” to open the photo modal pop-up viewer.

**Note:** hover over listing photo thumbnails to display inline directional arrow keys.

- 3 Click the, “Map” icon to view where this property is **located on the map**.

- 4 Write a **note** then click the, “Add Note” button to include additional information about this listing.

**Note:** notes are only visible to you and your Agent.

**Note:** a collection of your notes is available in the Portal's, “Messages” section (see the, “Messages” section of this Guide for more information).

- 5 **Categorize** this listing as a, “Favorite”, “Possibility” or “Discarded” by clicking on the associated icon.

**Note:** a collection of your categorized listings is available in the Portal's, “Favorites” section (see the, “Favorites” section of this Guide for more information).

- 6 Click [Back to Results](#) to **return** to the search results or [Previous](#) to view the previous or next listing.

The screenshot shows the Portal 7.0 interface with the following elements:

- Top Navigation Bar:** Dave Marsh, Real Estate Professional, Ph: (565) 555-1215, Cell: (565) 555-1212, dmash@corelogic.com. Links: Find a Home, My Searches, Favorites, Messages, My Agent.
- Search Bar:** Jump to a location, Start a New Search.
- Map View:** A map showing the location of the selected property.
- Property List:**
  - 5117 Tangle:** Houston, Texas 77056-2115. Single-Family Property, Other Style, Traditional Style in Tangle Lane Homes. MLS Number: 45415545. 4 Bedrooms, 5,495 SqFt, 5,920 SqFt Lot Size. Built in 2005. Price: \$1,500,000. Description: BEAUTIFUL custom home nestled in a PRIVATE GATED enclave in the Tanglewood area! Quiet location, abundance of natural light, soaring ceilings, elevator, rich walnut & travertine floors thru out, gourmet k...
  - 5643 Ella Lee Lane:** Houston, Texas 77056-4022. Single-Family Property, Other Style, Traditional Style in Briarcroft. MLS Number: 18125894. 6 Bedrooms, 5,893 SqFt, 9,000 SqFt Lot Size. Built in 2016. Price: \$1,669,000. Description: BEAUTIFUL custom home nestled in a PRIVATE GATED enclave in the Tanglewood area! Quiet location, abundance of natural light, soaring ceilings, elevator, rich walnut & travertine floors thru out, gourmet k...
- Sorting Dropdown:** Newest, Price, SqFt, Beds, Baths, Year Built.
- Full Display Link:** A link to view more details for the selected property.
- Property Photo Modal:** A large photo of the property with directional arrow keys.
- Map Icon:** A map icon to view the property location.
- Notes Section:** A section for adding notes about the property.



# My Searches

## My Searches

- 1 From the Portal's top menu, click the, "**My Searches**" option to access custom searches created and saved by you as well as Auto Email searches created, for you, by your Agent.

## View Search Results

### 1 My Searches

- 1a Click the, "[Custom Saved Search](#)" link to run your search.

**Note:** click the, "Trash" icon  to delete your Saved Search.

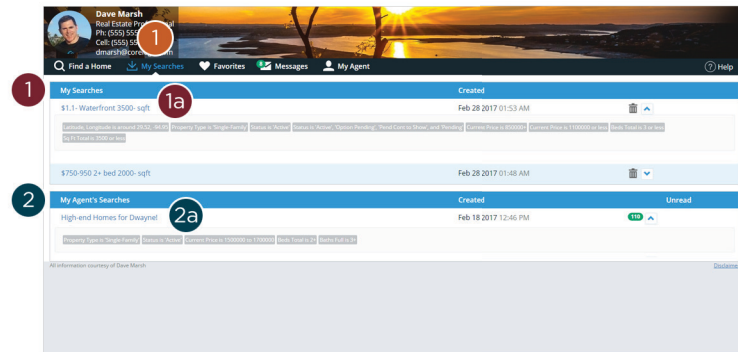
**Note:** click the, "arrow" button  to view your Saved Search criteria.

### 2 My Agent's Searches

- 2a Click the, "[Agent's Saved Search](#)" link to run the search created by your Agent.

**Note:** total **110** represents the number of listings.

**Note:** click the, "arrow" button  to view the Agent Saved Search criteria.



# Favorites

## Favorites

- 1 From the Portal's top menu, click the, "**Favorites**" option to access listings that you've categorized as a, "Favorite", "Possibility" or "Discarded".
- 2 Choose how you would like your **listings displayed**.  
**Note:** see, "Listing Displays" in the, "Find a Home" section of this Guide for more information.
- 3 Select a **tab** to view the associated listings.

### Favorites ♥

- 3a Click the, "Favorites" tab to view your collection of saved, favorite listings.

**Note:** a favorite listings will remain in this folder indefinitely (or until you choose to remove it).

### Possibilities ♡

- 3b Click the, "Possibilities" tab to view your collection of saved listings that you consider a possibility.

**Note:** a possible listings will remain in this folder indefinitely (or until you choose to remove it).

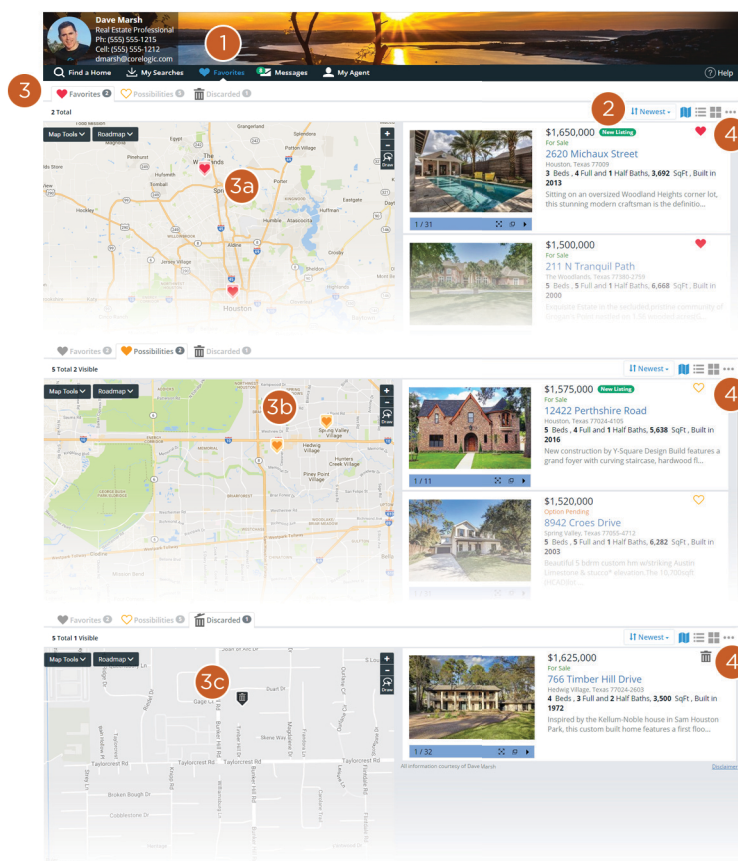
### Discarded 🗑️

- 3c Click the, "Discarded" tab to view your collection of listings that you're not interested in.

**Note:** a listing that was sent directly (Direct Email) to you, from your Agent, will be removed from the, "Discarded" folder after a minimum of 90 days.

**Note:** a listing that was sent automatically (Auto Email), from the system, will be removed from the, "Discarded" folder 14 days after the listing no longer matches the original search criteria (ie. price change, status change, etc.).

- 4 **Re-categorize** this listing as a, "Favorite", "Possibility" or "Discarded", or remove it from its current folder, by clicking on the associated icon.



# Messages

## Messages

1 From the Portal's top menu, click the, "**Messages**" option to access Direct and System Messages as well as Property Notes written by you or from your Agent.

2 Select the, "**Messages**" tab.

2a Click the, "**Subject Line**" link to view the message content.

**Date:** date and time the notification was sent.

**Subject:** friendly description of the contents.

**Type:** category of what was sent.

**Property Alerts** - Also known as, "Auto Emails", these searches are automatically emailed, to you, when new listings that match your criteria appear on the system.

**Listings** - Also known as, "Direct Emails", these listings are emailed, to you, directly from your Agent.

**Content:** what exactly the notification contains.

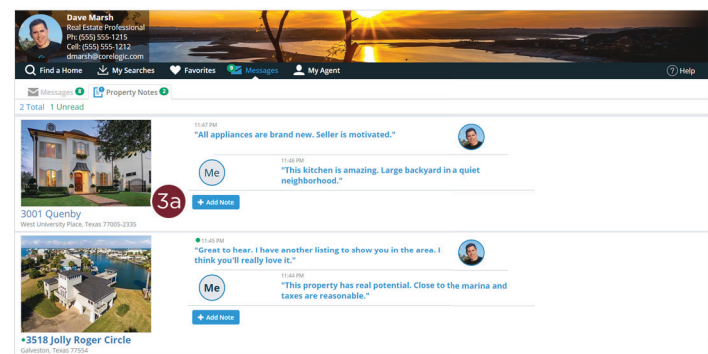
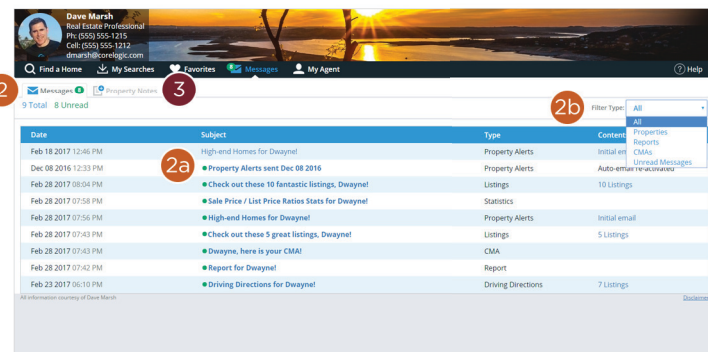
**Note:** new, unread notifications are indicated by a **Bold Subject Line** and are preceded with a **•** icon.

2b Select a notification type from the dropdown list to filter your messages.

**Note:** notifications may include Properties, Stats, CMA's, Reports or Driving Directions.

3 Select the, "**Property Notes**" tab.

3a Click the, "Add Note" button to either respond to your Agent's message or simply to add an additional comment about the property for yourself.





# My Agent

## My Agent

- 1 From the Portal's top menu, click the, "**My Agent**" option to view information about your Agent.
- 2 View a, "**Welcome**" message plus any additional content from your Agent.
- 3 **Contact** your Agent.

**Dave Marsh**  
Real Estate Professional  
Ph: (555) 555-1215  
Cell: (555) 555-1212  
dmarsh@corelogic.com

Find a Home My Searches Favorites Messages **My Agent** Help

Dear Bjorn Free,

Welcome to your Portal. As a third generation Real Estate professional, I have made property development and the real estate industry my life's focus. I personally have over 10 years of property development and income property experience to assist clients in making the perfect real estate decision.

Past, and current, clients will tell you that it's my enthusiasm for real estate, professionalism and industry knowledge that allows me to provide outstanding service to my clients. I understand not only that buying and selling real estate is the single largest financial decision an individual will make, but that there are other aspects beyond just the look and feel of the property, that can put a client years ahead financially. Understanding that real estate is one of the best self-made retirement plans, I can help you develop a plan that works for you in the short term and shapes your financial future for the long term.

**Dave Marsh**  
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Dare to Dream

All information courtesy of Dave Marsh

FOR MORE INFORMATION PLEASE VISIT  
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