CoreLogic®

Portal 7.0

Quick Start Guide

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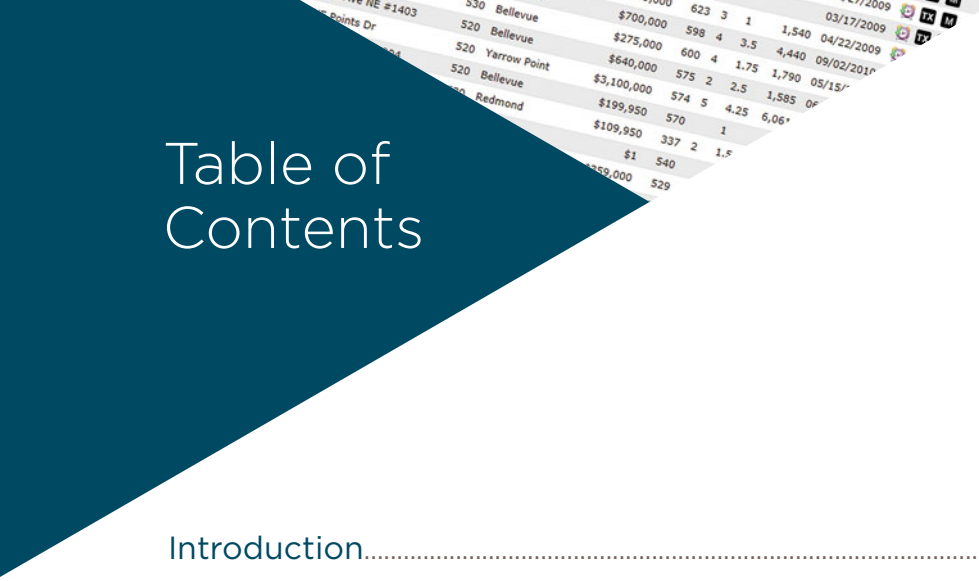

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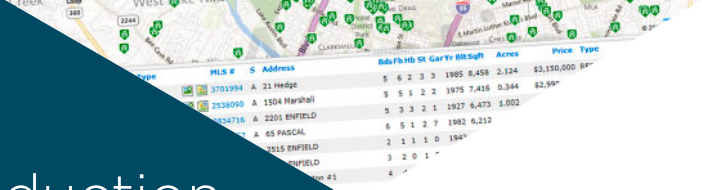
Introduction



Welcome to The Portal

Your Portal is a repository for information shared between you and your agent. It's a central location that organizes Auto Searches, Reports and Selected Listings in a way that helps you better manage each of them going forward.

Your Portal also allows you to create, and save, your own Custom Searches. It's a communication tool that, through email or listing notes, connects you with your agent whenever additional property information is required.

And, finally, because your Portal is dynamic, you're always viewing live, up-to-the-minute data. So, whether there's been a change in listing price or, perhaps, an updated public remark, you'll see it all in real-time.

So, let's explore, in detail, each of the features that will come to make your Portal experience a productive one.

Enjoy.

Your Portal

Responsive Design

1. 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

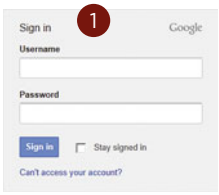
1. **Sign in** to the application (i.e., Outlook, Gmail, Hotmail etc.) where you are currently receiving email from your agent.

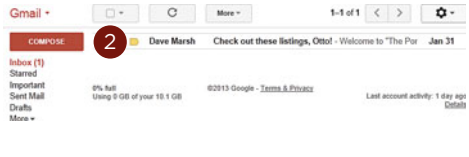
2. **Open the notification message** that appears from your agent.

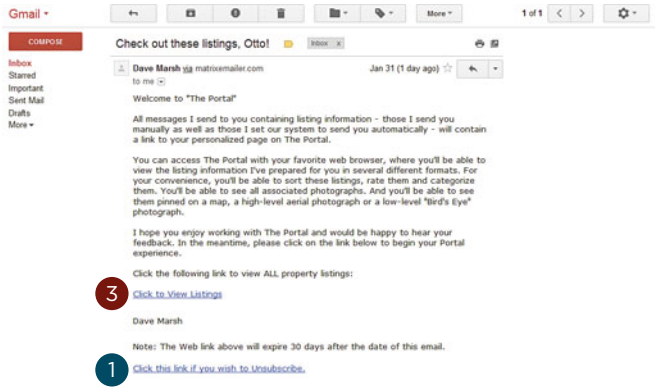
3. Click this link to **open your Portal**.

   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 favourite browser.







Unsubscribe

1. Click the, "unsubscribe" link to **open your unsubscribe options**.

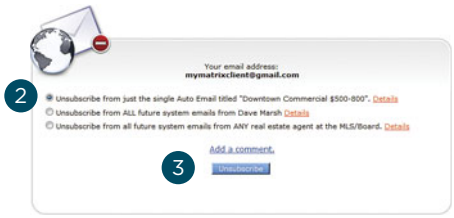
2. **Select an option**.

   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.

   Note: if available, any additional comments (optional) are logged for internal use and are not visible to your agent.



3. Click the **unsubscribe button**.

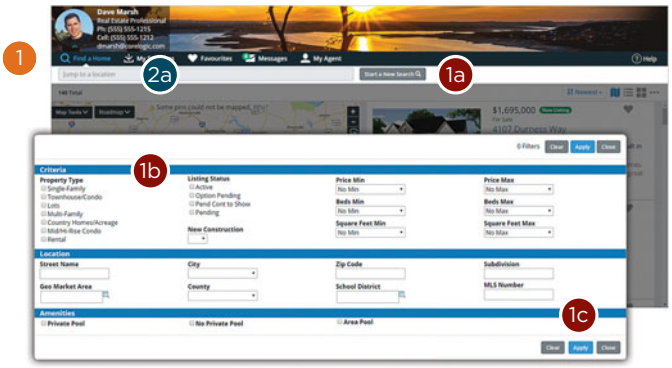
   Note: when you unsubscribe from an Agent, an, "opt-in" email address will appear (usually in the form of, "optin.NAME@matrixemailer.com" where, "NAME" represents something unique). Copy this entire email address and store it for when you would like to opt back in sometime in the future.

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

Find a Home

Find a Home

1 From the Portal's top menu, click the, "**Find a Home**" option to either access listings sent to you by your Agent or to create a Custom Search of your own.



How to Search

1 **Custom Search**

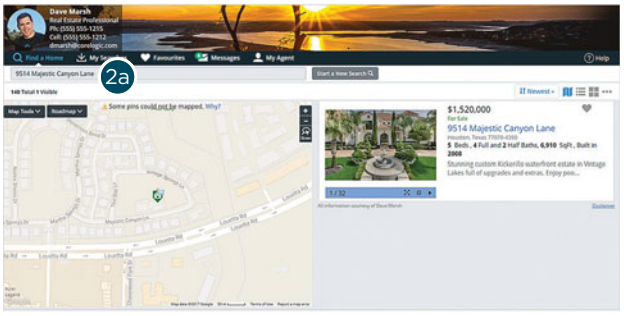
1a From the, "Find a Home" section, click the, "**Start a New Search**" button.

1b From the modal pop-up, **select the criteria** for the properties that you would like to search.

1c Click the, "**Apply**" button.

Note: custom Searches may also be created from the, "My Searches" section if you currently have no Saved Searches (see the, "My Searches" section in this Guide for more information).

Note: click the, "Filters" button to modify the criteria after your search.

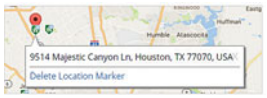


2 **Address Search**

2a From the, "Find a Home" section, type the **property address** into the, "Jump to a location" textbox then press, "**Enter**" on your keyboard.

Note: you may use a specific street, neighborhood, county, city or postal code.

Note: to remove the, "Location Marker", click the marker then, from the pop-up, click the, "Delete" link.

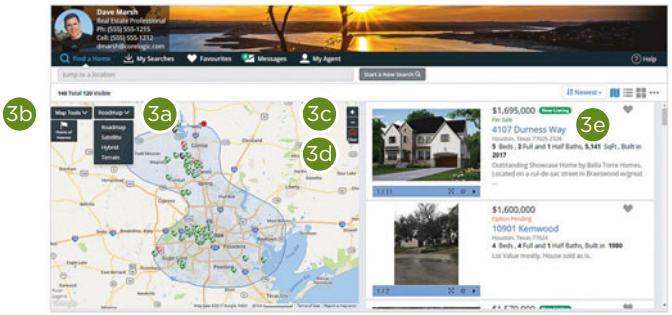


3 **Map Search**

3a From the, "Find a Home" section, click the, "**Roadmap**" dropdown list to change how the map displays.

Note: map Displays include Roadmap (default), Satellite, Hybrid & Terrain.

3b Click the, "**Map Tools**" dropdown list to display any additional Map options.



3c Click the,"**+**" and"**−**" buttons to zoom in/ out of the current map display.

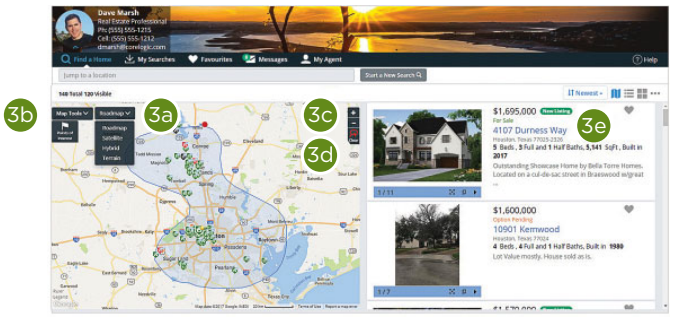
Note: for faster zooming results, use the mouse wheel when viewing from your desktop.

3d Isolate listings by creating a unique shape using the, "**Draw**" button.

Note: click the, "Clear" shape button to remove the drawing and reset the map.

3e Click a, "Map Marker" to view limited listing details.

Note: see, "Listing Displays" in the, "Find a Home" section of this Guide for more information.



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

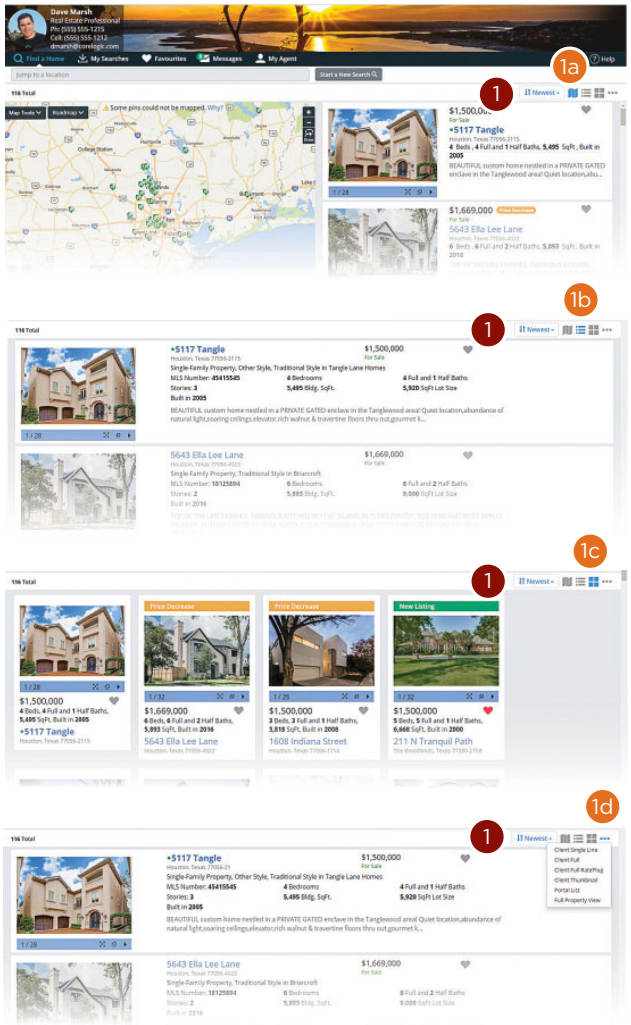
1b Click the, "List View" button to display a thumbnail list with limited property details.

Gallery View

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

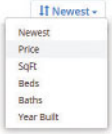
Additional Views

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



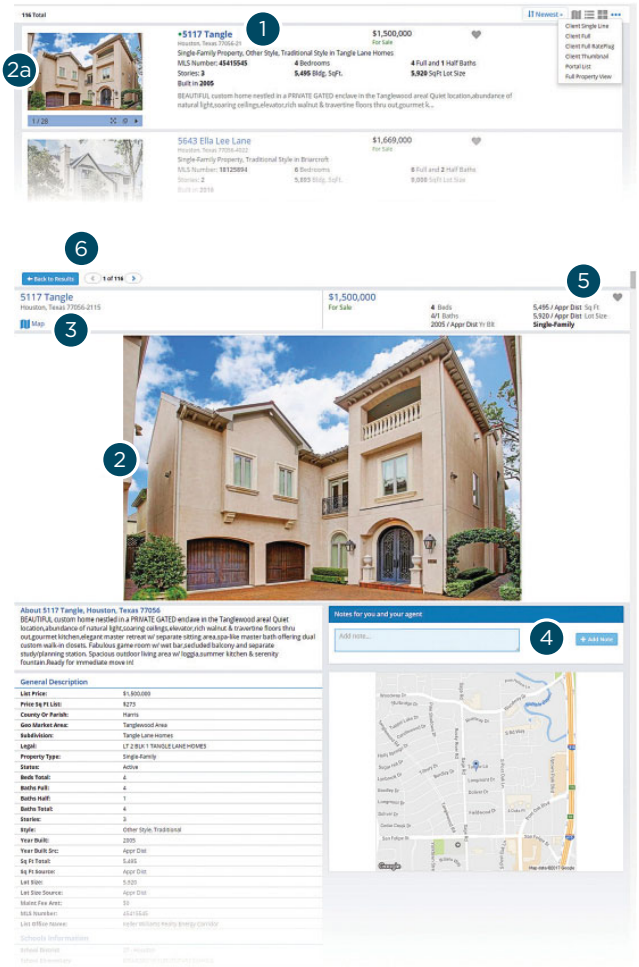
Changing the Order

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).

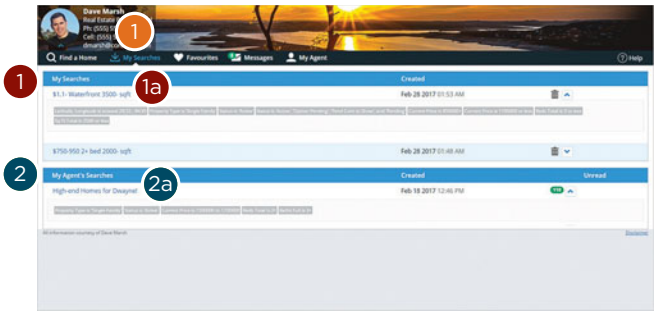
5. **Categorize** this listing as a, "Favourite", "Possibility" or "Discarded" by clicking on the associated icon.

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

6. Click ← Back to Results to **return** to the search results or ‹ › to view the previous or next listing.Legend

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**

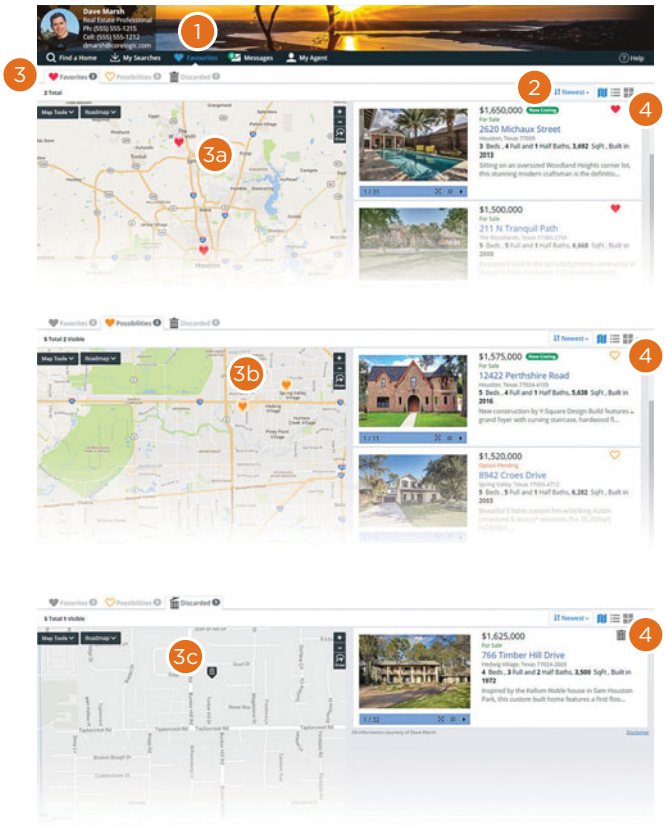
2a Click the, "Agent's Saved Search" link to run the search created by your Agent.

Note: total 110 represents the number of listings.

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

Favourites

Favourites



1. From the Portal's top menu, click the, "**Favourites**" option to access listings that you've categorized as a, "Favourite", "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.

   Favourites ♥

   3a Click the, "Favourites" tab to view your collection of saved, favourite listings.

   Note: a favourite 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.

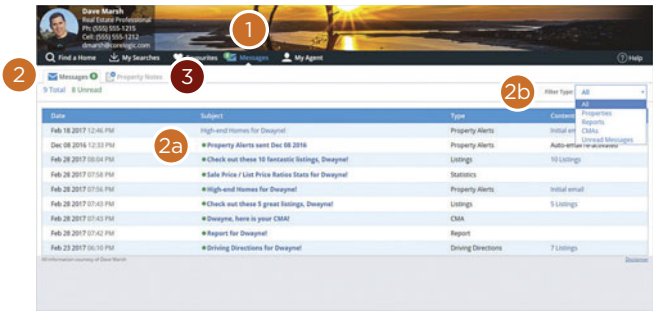
   Note: a listing that was sent directly (Direct Email) to you, from your Agent, will be removed from the, "Discarded" folder after a minimum of 90 days.

   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, "Favourite", "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.

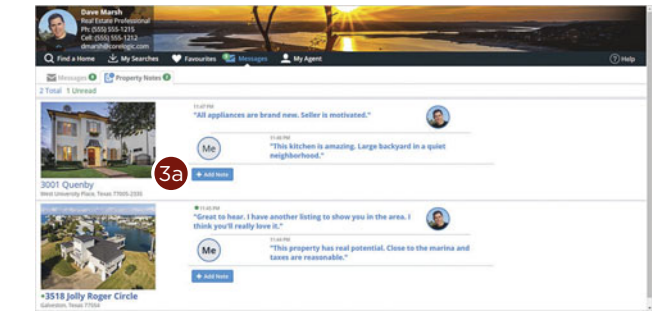
   Date: date and time the notification was sent. Subject: friendly description of the contents. Type: category of what was sent.

   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.

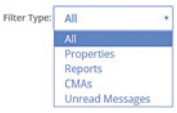
   Listings – Also known as, "Direct Emails", these listings are emailed, to you, directly from your Agent.

   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.

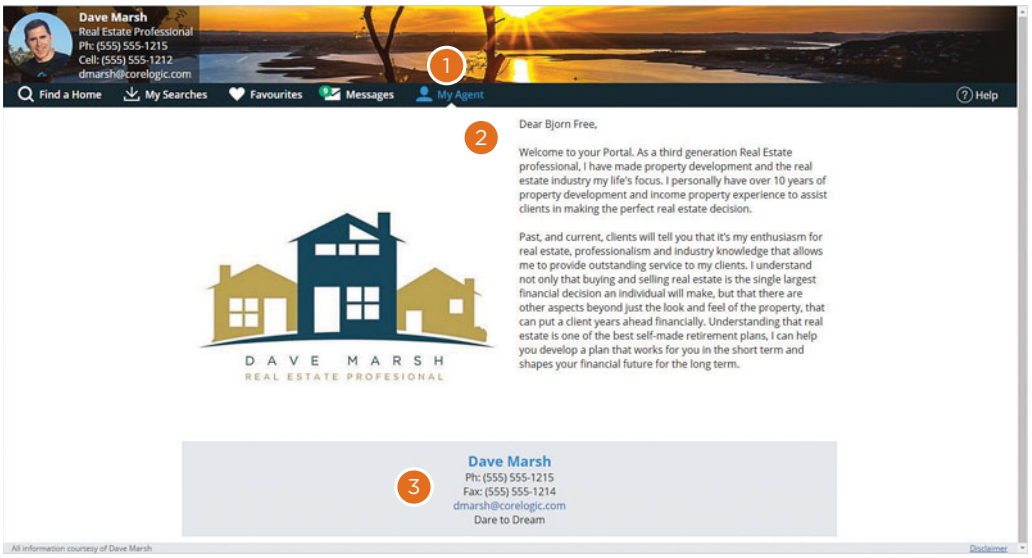
3. Select the, "**Property Notes**" tab.

   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.



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