

# Instructions for the 1004 MC Spreadsheet for MLSListings using the new MATRIX Search Tool

An MLS in Santa Clara, San Mateo, Santa Cruz, San Benito & Monterey counties  
Don Machholz, Colfax, CA (530) 320-8204  
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For the 1004 MC it is important to gather and format the proper information from the MLS system. One tool that will do this is the **Spreadsheet For The 1004 MC 4c** Excel program which I wrote and made available free to all appraisers. It is available at [www.donsappraisals.com](http://www.donsappraisals.com) my website, which has frequent updates. These instructions tell how to use the MATRIX search tool to gather and format the data needed for the spreadsheet.

First, login to MLSListings, and click the “Matrix Search” button to connect you to Matrix

**One time only, you will need to create a custom export for the 1004MC spreadsheet:**  
Click on the “My Matrix” tab at the top of the screen, then  
Click on the “Settings” link at the bottom of the choices on the screen, then on the next screen  
Click on the “Custom Exports” link at the bottom of the screen, then on the next screen  
Click on the “Add Export” button on the right side. Your screen should look something like this, except the “Export Name”, “Export Fields” and “Export Description” will be blank:

The screenshot shows the 'Set Export Definition' window for 'Residential' listings. The 'Export Name' field contains '1004\_MC\_Data'. The 'Available Fields' list includes: 1st Tour Date, 2nd Tour Date, Acres, Additional Listing Info, Addl Owner, Age, Amenities, ArealD, AreaName, Assoc Docs, Assoc Fee, and Assoc Fee Includes. The 'Export Fields' list includes: Status, Street Number, Street Name, List Price, Sale Price, Age, Bldg SqFt, Lot Size Area, List Date, Sale Date, COE Date, and DOM. The 'Include Column Names' is set to 'None', and the 'Separator' is set to 'Comma'. The 'Export Description' field contains '1004\_MC\_Data'. The 'Save' and 'Cancel' buttons are at the bottom.

Now, you are ready to create an 'export' for our 1004MC spreadsheet. Choose and enter a name (something like "1004\_MC\_Data" shown above) for your export in the "Export Name" box at the top, and put that or a similar description in the "Export Description" at the bottom.

Then, select each of the following fields from the "Available Fields" box on the left, and after selecting one, click the "Add->" button to move it to the "Export Fields" box on the right. Do this in the order shown below, and after you finish adding each one, your screen should look like the picture above.

This is what is needed for the 1004 MC program, in this order:

- 1) Status
- 2) Street Number
- 3) Street Name
- 4) List Price
- 5) Sale Price
- 6) Age
- 7) Bldg SqFt
- 8) Lot Size Area
- 9) List Date
- 10) Sale Date
- 11) COE Date
- 12) DOM

At the bottom of the screen, click the "None" button for "Include Column Names", and the "Comma" button for "Separator".

Then, click the "Save" button at the bottom of the screen,  
Then, click on the "Done" button at the bottom of the next screen.

*Now, you are ready to do your subject-specific search for 1004MC data using the Matrix tool. (Or if you haven't begun using Matrix yet, get your Training for Matrix from MLSListings)*

To assure you get all the data needed for the 1004MC calculations, on the search screen:

1. Get all 8 statuses by leaving the Status field blank in the upper left part of the screen
2. Get sufficient data to capture all properties active in the past 12 months by putting a date 16-18 months ago in the "Change Date" field in the bottom right

The screenshot shows the 'SFR/Townhouse/Condo Search' interface. The 'Status' field is empty and circled in red. The 'Change Date' field is set to '6/1/09+' and also circled in red. Other search criteria include Building Type (Single Family Residential), Building Description (Beds, Full Baths, Partial Baths, SqFt, Lot Size), Price, Dates, Location, and Hot Sheet options.

Add your other criteria (like GLA, lots size, map boundaries, etc), and click "Results"

Once you have your results, select them all using the "Check all 430" link at the top (430 is the number of results in this example), and click the "Export" button at the bottom right of the page.

<input type="checkbox"/>	A	81040141	727 KIRK GLEN DRIVE	\$688,888	47	4	2 1	2,124	6,000 Sqft	San Jose	1	38	
<input type="checkbox"/>	PN	81042370	3105 HEITMAN COURT	\$688,000	10	4	2 1	2,303	6,000 Sqft	San Jose	1	39	

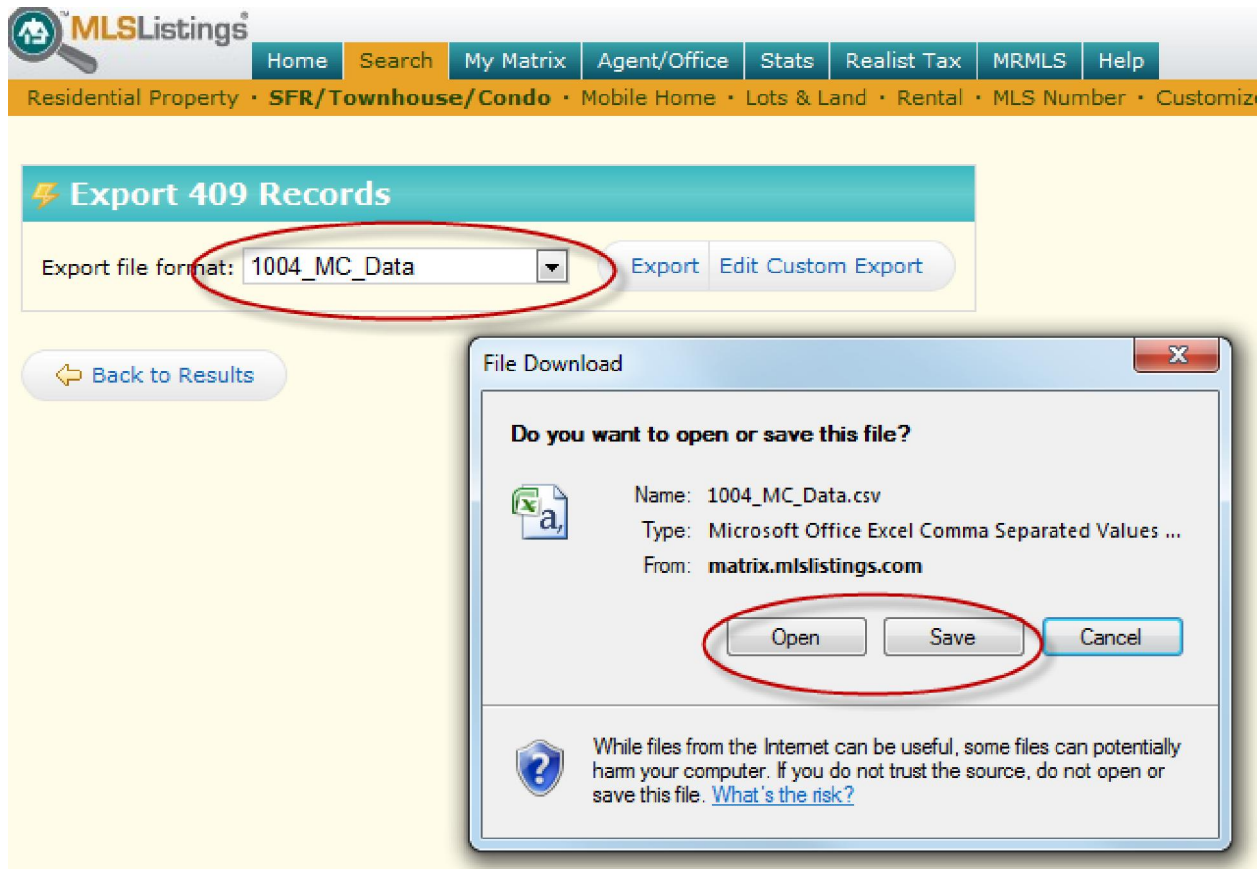
Previous · Next · [1] 2

Revise Email Report CMA Map Stats Save As

Narrow Display **Export**

On the Export screen which pops up next, select the “1004\_MC\_Data” format you created earlier from the drop down box (you can define multiple “export file formats” for other uses as well).

Click the “Export” button, and when the File Download box appears, click the “Save” button, and save to your work file for the subject property (or elsewhere if you like).



Now, you’re done with the MLS portion of your work.

Open the file you just saved,

select all the data (you can use ctrl-a),

open the **Spreadsheet For The 1004 MC**,

and paste the data beginning in cell A24 on the Data input tab

Review your results on the Results or 1004MC tabs.

--- Done ---