Barrie & District Association of REALTORS®

MATRIX™

How to Set-Up Personal Assistants & Teams

Updated: Aug 2017

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USING IMPERSONATION IN MATRIX

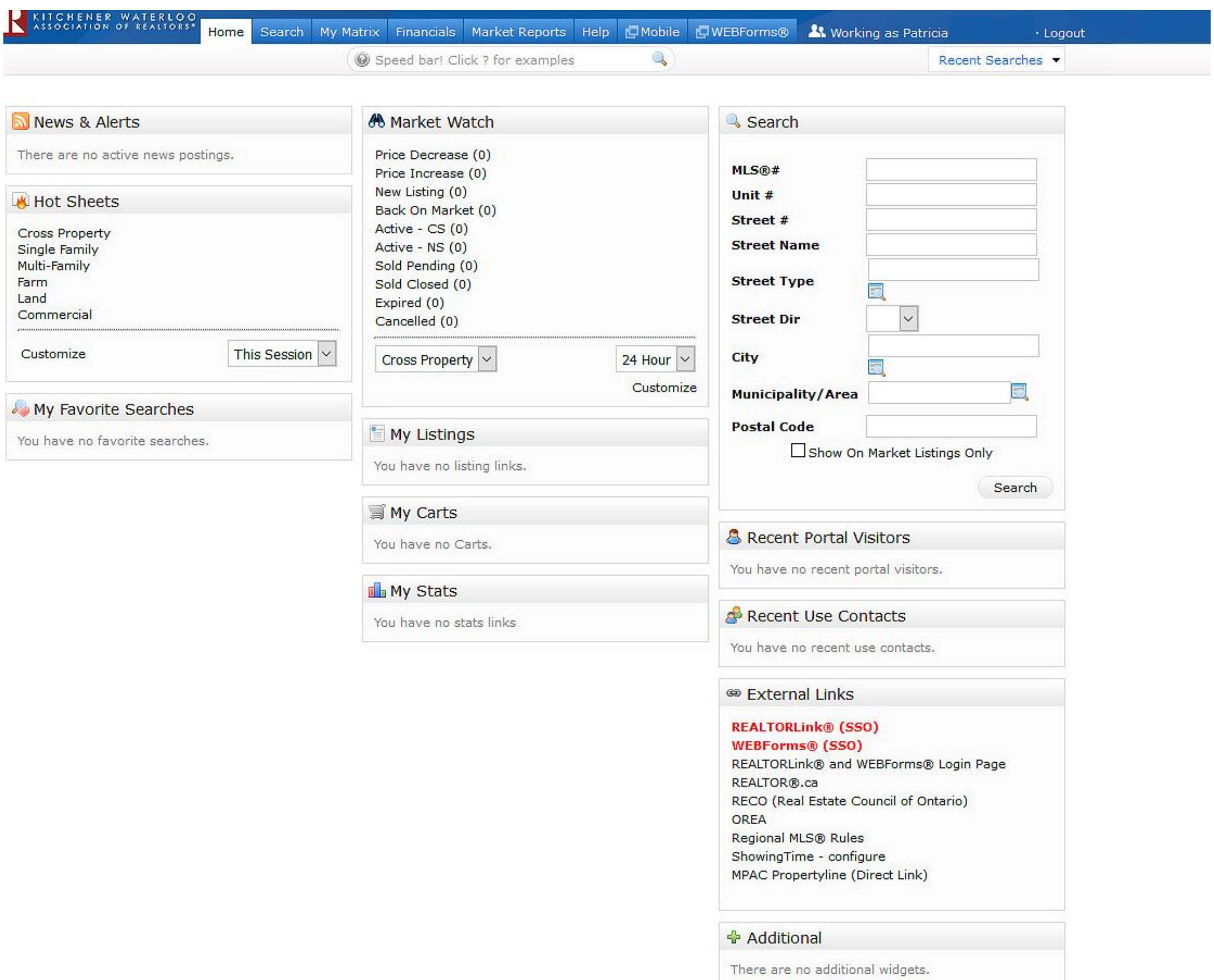
PERSONAL ASSISTANTS IN MATRIX

You have a brand-new personal assistant and want them to be able to enter and edit listings, send out emails, add contacts, set up searches and so on for you in Matrix.

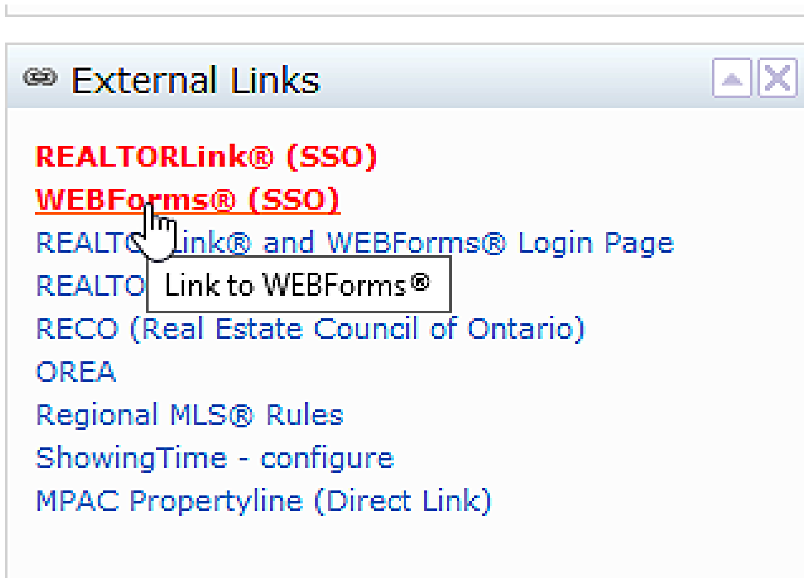
But the assistant only has some basic functions he or she can perform as themselves until they are set-up in Matrix.

With a brand new personal assistant (PA) login they can sign into Matrix, and some things will appear there that might look like they will work, when in fact, they don't.

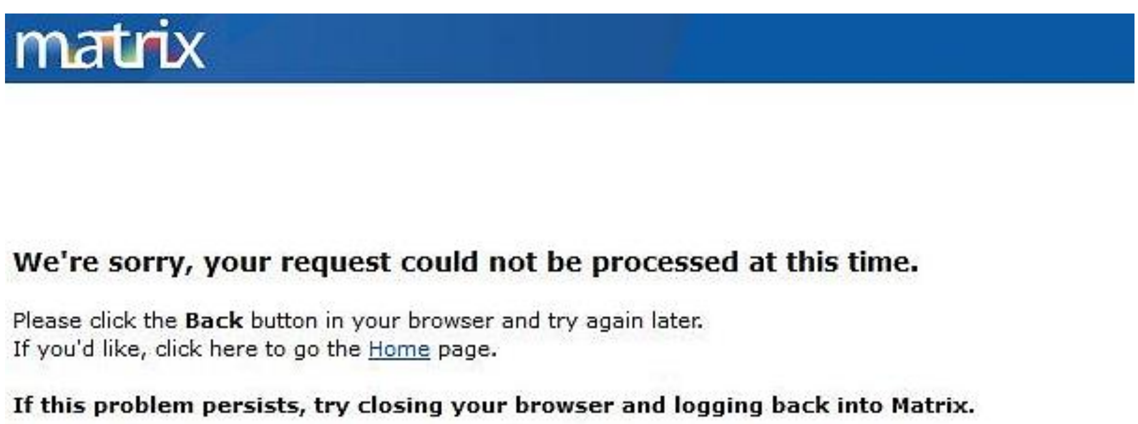
When the PA first logs in, he sees the Matrix homepage like a regular agent. But you'll notice that those listing counts are all zero as are the Hot Sheets and Market Watch categories. No My Listings counts, no carts, no recent portal visitors and no stats and favourite searches. Even the Search widget box is there as a placeholder only, because a PA can't search listings be default.



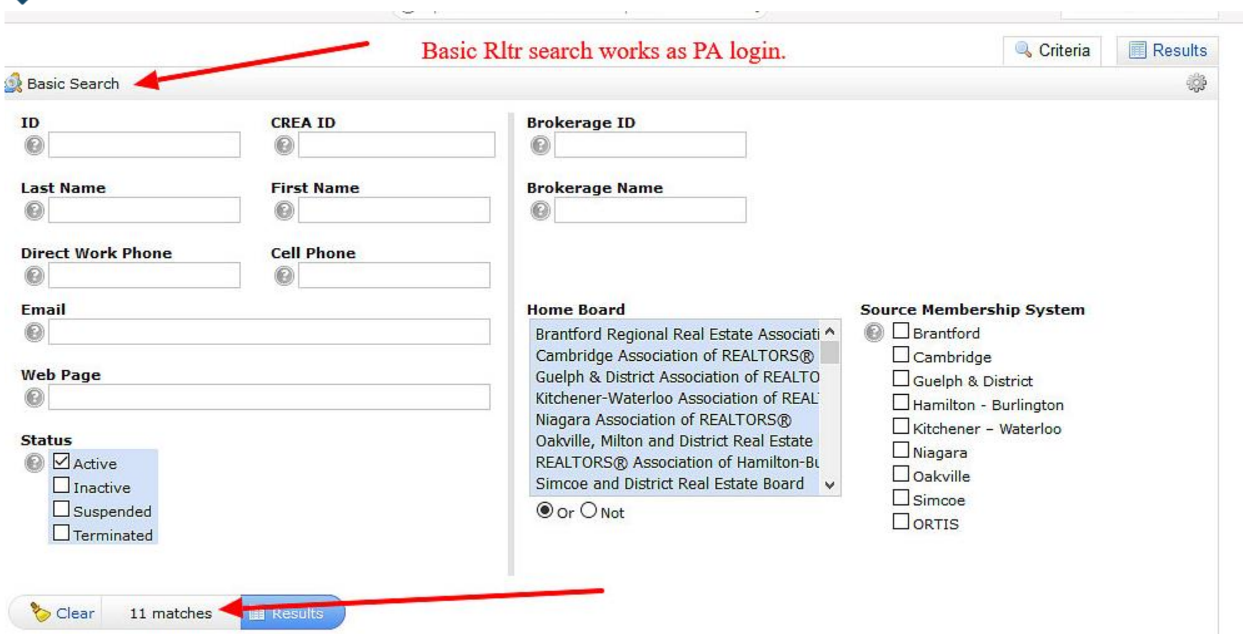
Down in the right-hand corner, you see an External Links widget, which will work to give you a new browser tab with the link shown if it's not a 'SmartLink'. A SmartLink like WEBForms® (SSO) will take you to the WEBForms® site and automatically log you in as a realtor, if you are realtor. SSO stands for Single Sign On.



But PA's aren't realtors, so all they get from this SmartLink and the REALTORLink® (SSO) SmartLink is the Matrix error page.



When logged in as a PA login (not impersonating a realtor), you can only search against the realtor or office tables.



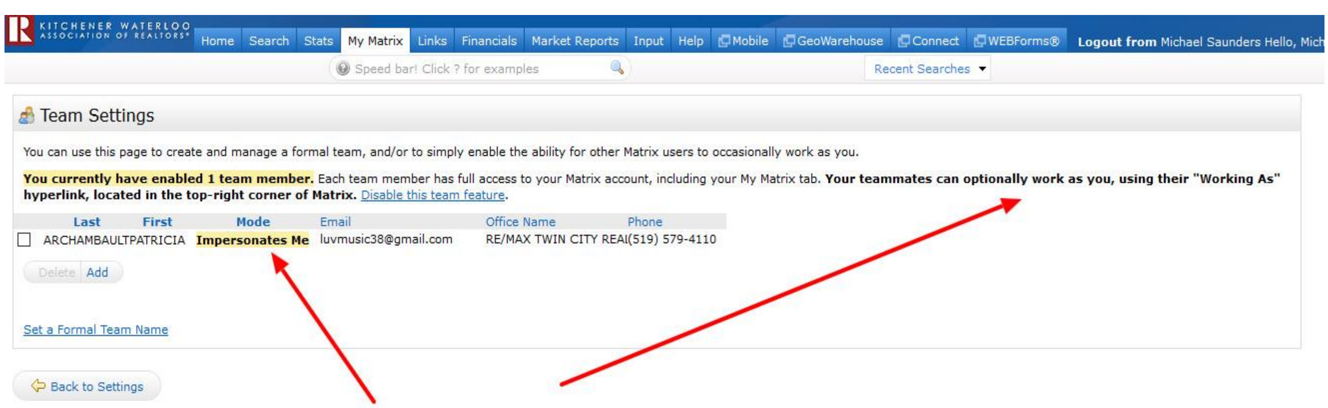
Other things that appear to be there and could be used are Market Reports, but clicking on the tab gives you the option to use the agent level report which returns no counts. (An empty report)

The bare PA login can use settings to fill in their personal information, create headers and footers for pages they can never populate and so on. So really what is necessary as the next step for the personal assistant login is for their realtor to set them up on their side of Matrix.

The realtor will need to use the Team function in Matrix to set up their personal assistant.

TEAMS IN MATRIX

The Matrix Teams functionality makes it possible to add other agents to a team, and makes it possible for another agent to add you to their team.



Agents (or their assistants) may **work on behalf** of an agent or even **impersonate** another agent.

Matrix will only allow you to add others to your team who have an **Active Matrix ID** on the system.

IMPERSONATE AN AGENT

If the agent you work with added you to their team in Matrix and set you up to **impersonate** them, you would be able to do the following things:

• Emails sent from Matrix would be sent from their name and email address, and would use their email banner and footer (if they had chosen one) and email signature.

• Print reports – any reports that are printed while impersonating an agent will have the information of the agent being impersonated in the "Courtesy of" information. In other words, the report will look as if it were printed by the agent that you're impersonating.

• Access another agent's Matrix Contacts, Saved Searches (you cannot change their team settings)
When you send an email from Matrix while you are impersonating an agent, the name and email address in the "From" line will be highlighted in yellow. This is to call attention to the fact that you are sending that email as that agent. This means that to the client, the email will look **exactly** as if it came from the agent being impersonated.

WORKING ON BEHALF OF AN AGENT

If an agent you work with added you to their team in Matrix and set you up to **work on behalf** of them, you would be able to do the following things while working on behalf of them in Matrix:

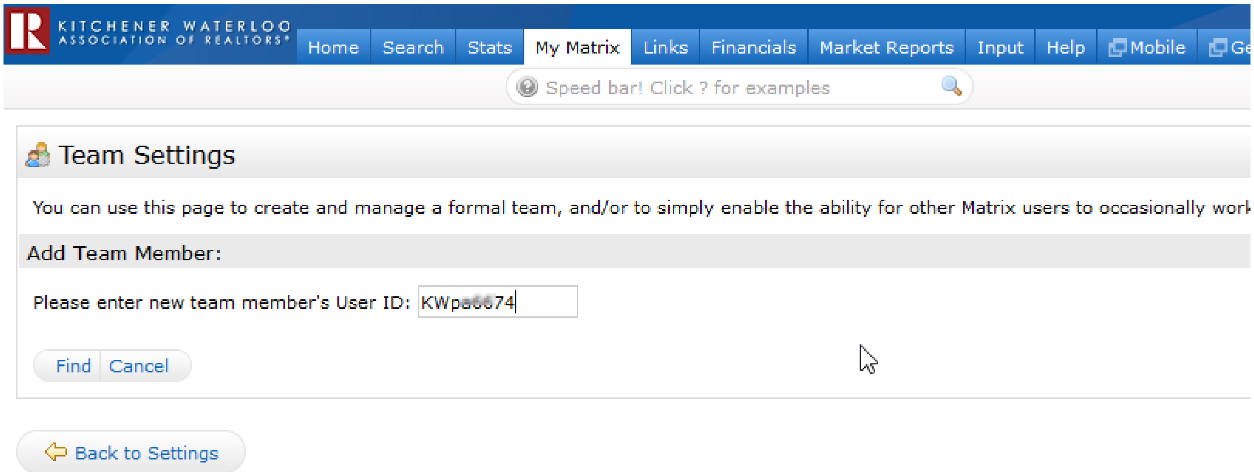
• Emails sent from Matrix would be sent from your name and email address on their behalf, and would use your email banner and footer (if you have chosen one) and email signature.

• Print reports - any reports that you print while working on behalf of another agent will indicate that they were printed by you on behalf of the other agent.

• Access their Matrix Contacts, Saved Searches (you cannot change their team settings)

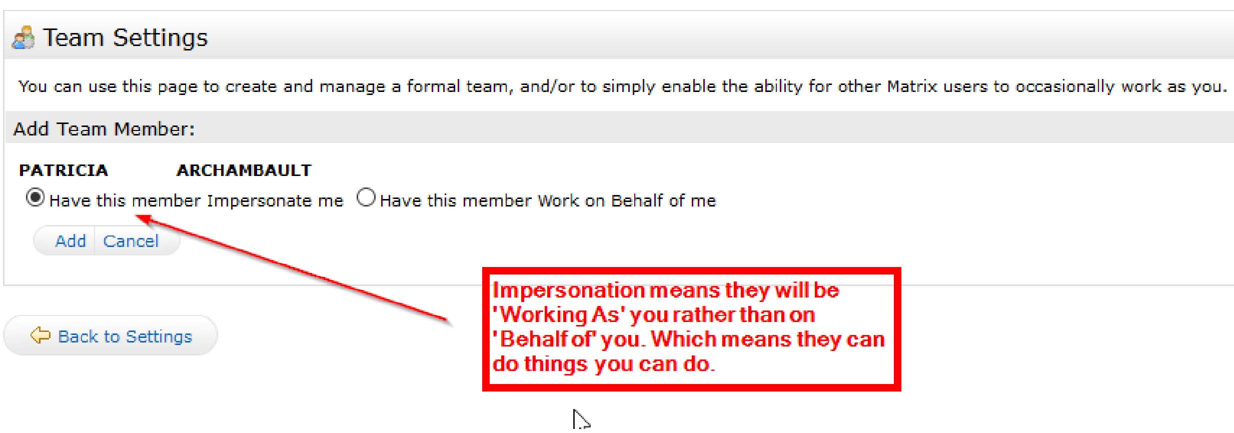
HOW TO SET UP A TEAM (REALTOR SIDE OF SETUP)

Click the My Matrix Tab, then the "Settings" link. At the bottom of the My Settings screen, you will find the Team Settings section. Click the link labelled "Click here to create a Team" and then again on the next screen.

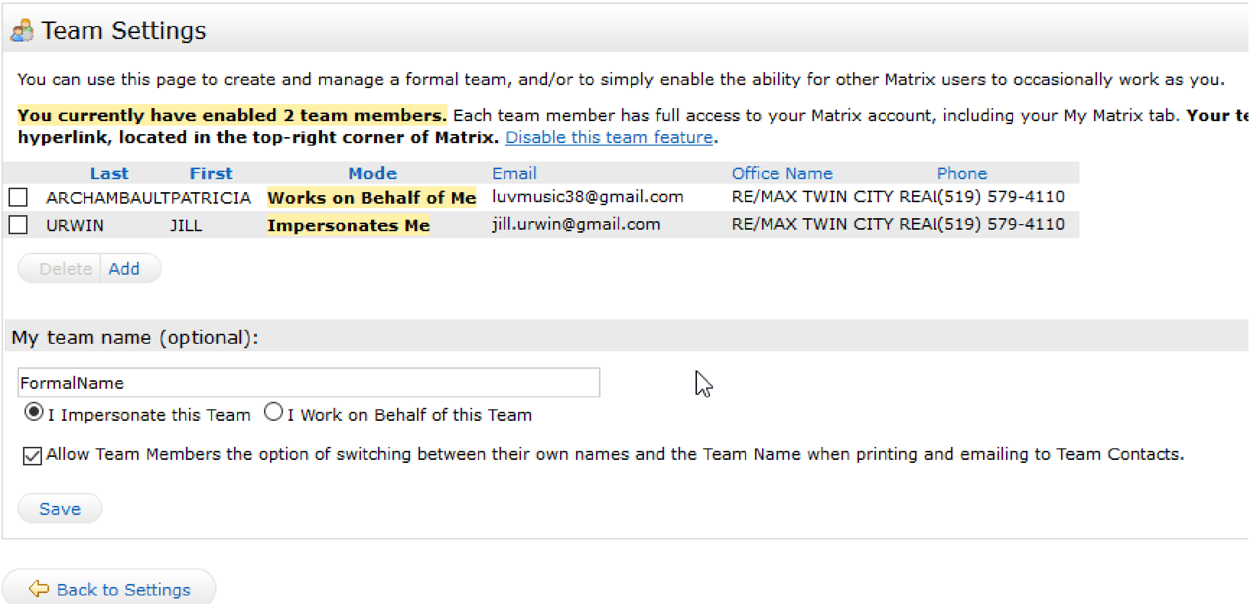


Type in the agent ID for the agent you want to add to your team. If you do not know the ID, you can find it through an Agent Roster search (Roster tab).

Select whether you want this colleague to Impersonate you or Work on Behalf of you. Click the "Add" button.



After adding your first team member, you will come to the main Team Settings screen.



Here you can control the following:

• Add additional team members (click the link "Click here to add a team member and/or someone that can work as you.")

• Delete team members or edit their impersonate/work on behalf status.

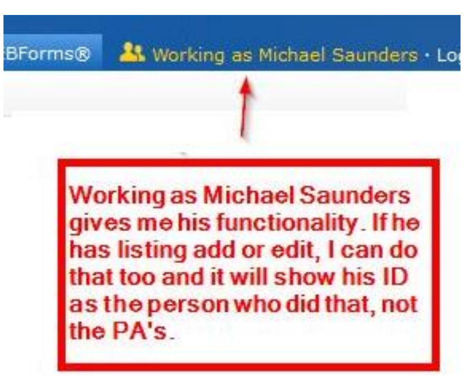
• Name your team (optional). Be sure to click the "Save" button after typing in your name.

• Set yourself up to either impersonate or work on behalf of the team.

• Allow team members the option of switching between their own names and the Team name when printing and emailing to Team Contacts. Be sure to click the "Save" button after checking or un-checking this box.

• Disable the team function.

After enabling the Team function, you will be alerted to it on the **Home page each time you log in:** A link is included to go straight to the Team Settings screen.



When one of your team members logs in, they can switch from their own individual login to theTeam login by clicking on their name in the **upper right corner** of the screen to open the select popup. There they can click to select the team name (or your name if you did not create a team name).

They can now see in the **upper right (and highlighted in yellow on the Home page)** that they are working as the team. When they click on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to your (the Team's) items. When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone:

If they are set to impersonate you, they haves the same choice except that if they select the Team, it will use your email address, not theirs.

To leave working as the team and go back to working as yourself, click the "Working as" link in the upper right of the screen and click to select your own name which is usually the first option in the dropdown list of names.

Once the realtor has the PA setup as his team member, they can now login, switch over to impersonating them and use Matrix as them.

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ASSISTANTS IN MATRIX

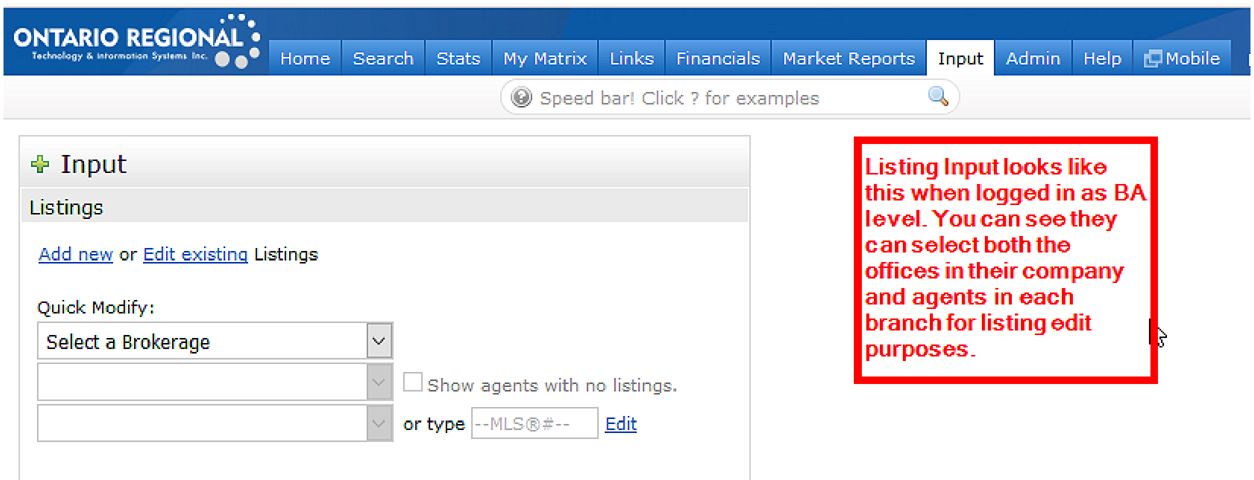
BROKERAGE AND OFFICE ASSISTANTS IN MATRIX

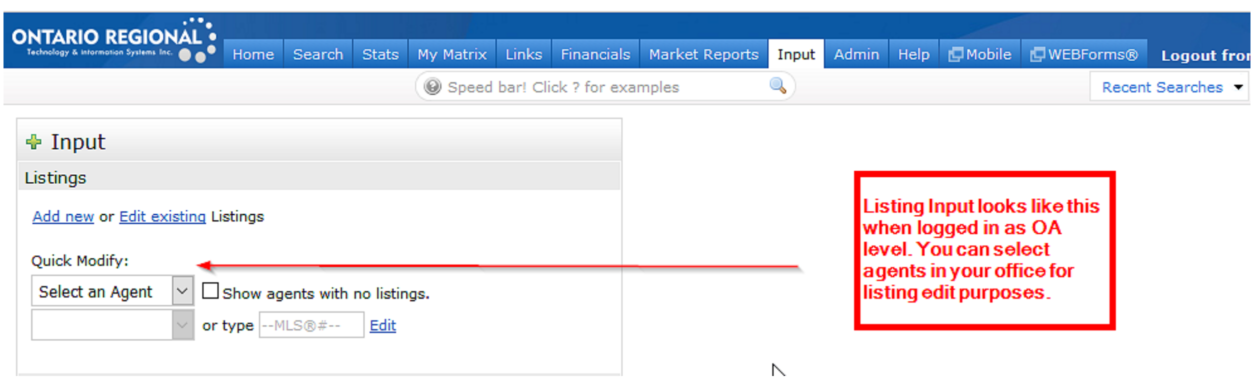
Aside from a member's personal assistant, there are two other classes of assistant available in Matrix.

The Brokerage Assistant (BA) and Office Assistant (OA) users which have different capabilities on their own without the need for impersonation or team functionality.

BA AND OF LISTING INPUT

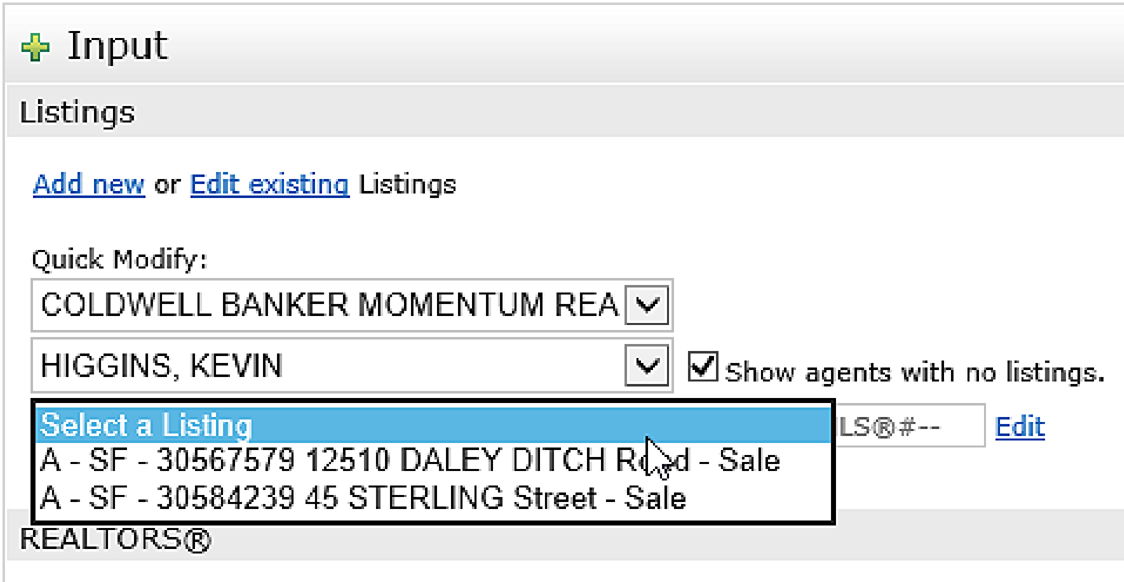
The Brokerage Assistant (BA) and Office Assistant (OA) user classes can add and edit listings for realtors in their company or office respectively without having to impersonate an agent.





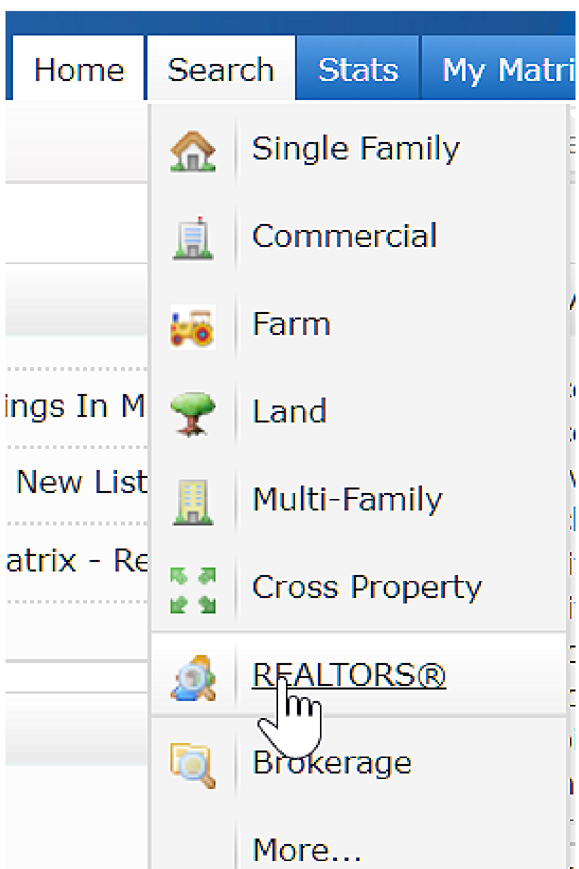
The 'Show agents with no listings' checkbox allows the assistant to select agents and put in new listings for them.

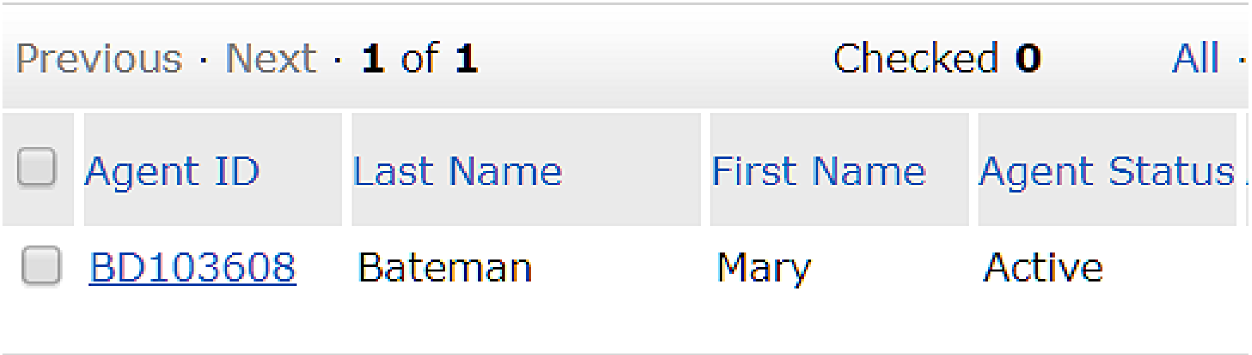
Each dropdown shows a list of offices, agents and listings available and as each option is selected this will filter down the next dropdown to the relevant choices for the selected option above it for ease of usage.



BA AND OF LOGINS USING WEBFORMS/REALTORLINK

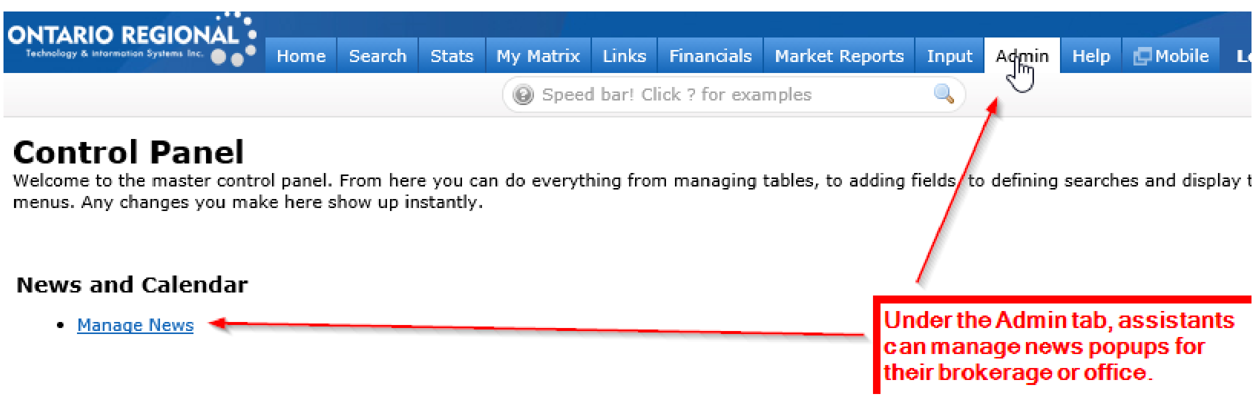
If a BA/OF login wants to work as a Realtor for purposes of adding/edit a webforms transaction kit, they can do a search for the Realtor in their office, and then click on the 'Login As Agent Realtorlink' (which takes them to their Board's R/L homepage where they can click on webforms).



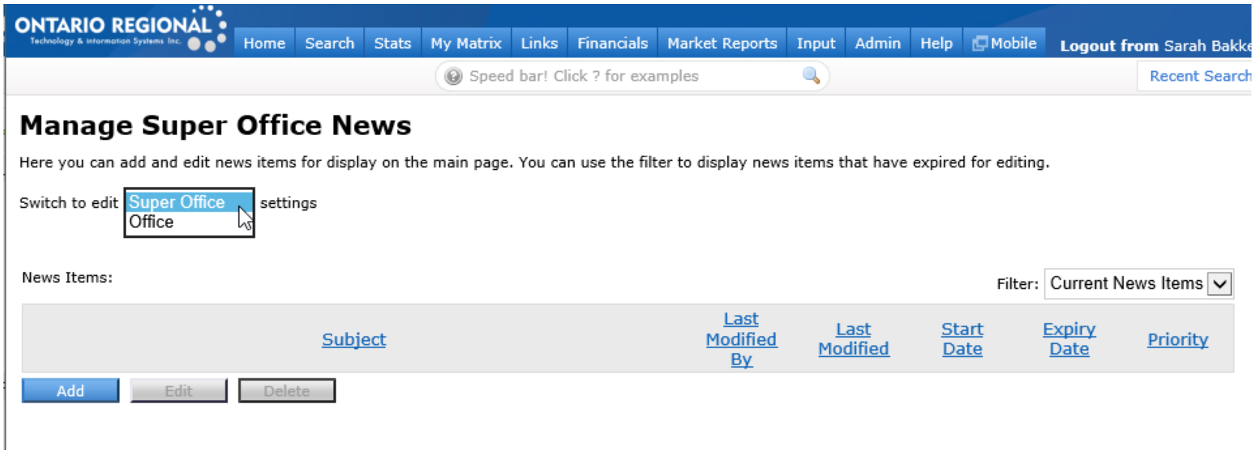


BA AND OF SENDING OUT THE OFFICE(S) NEWS

The Brokerage and Office Assistants can also can create news popups to appear when an agent first logs in to Matrix that are for your brokerage or office as well.

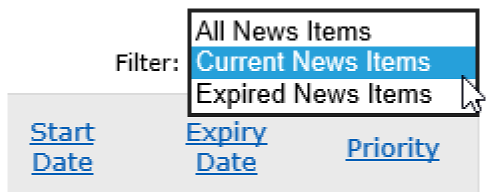


Super Office allows a BA login to create/edit news popups that only appear for their office(s):



While a OA login will only see the options for Office.

The BA login can choose to send to their whole company by using Super Office or just the office they belong to by using the Office setting only.

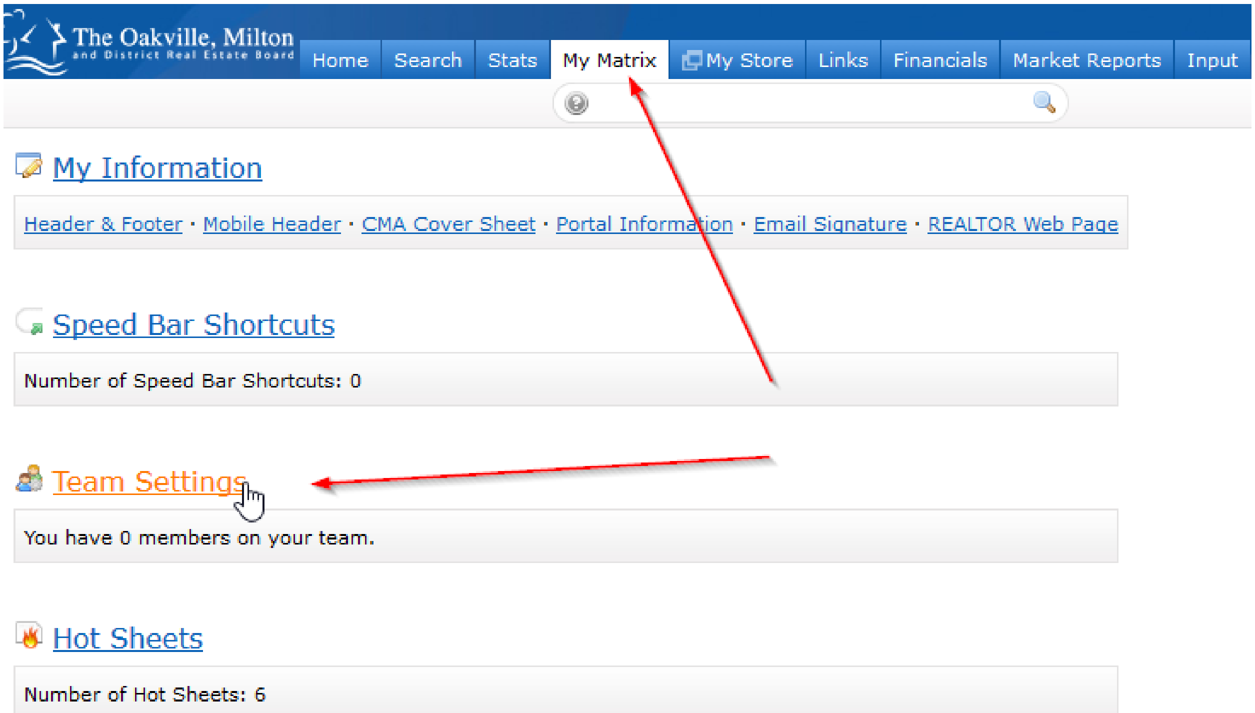


They can filter the view to see past news items (in case they want to reactive them and use them again with a bit of editing) or just the current ones or both.

BA AND OF WORKING AS OTHERS

To work as an agent, the assistants will need to be setup in Matrix first.

And by setup in Matrix, I mean that the agents that want the assistant to impersonate them or work on behalf of them will need to set them up in their My Matrix>Setting>Team Settings page as part of their team. After clicking on the My Matrix tab at the top, they then click on the Settings option shown below that and see a screen like the screenshot below. They can then click on Team Settings.



The Brokerage and Office Level assistant logins can be setup to work as single realtors/brokers or to work as a team that have been named and setup by a higher login. There is really no point in setting up a team on an assistant login as all they could do would be to give the same reduced functionality as they have by default.

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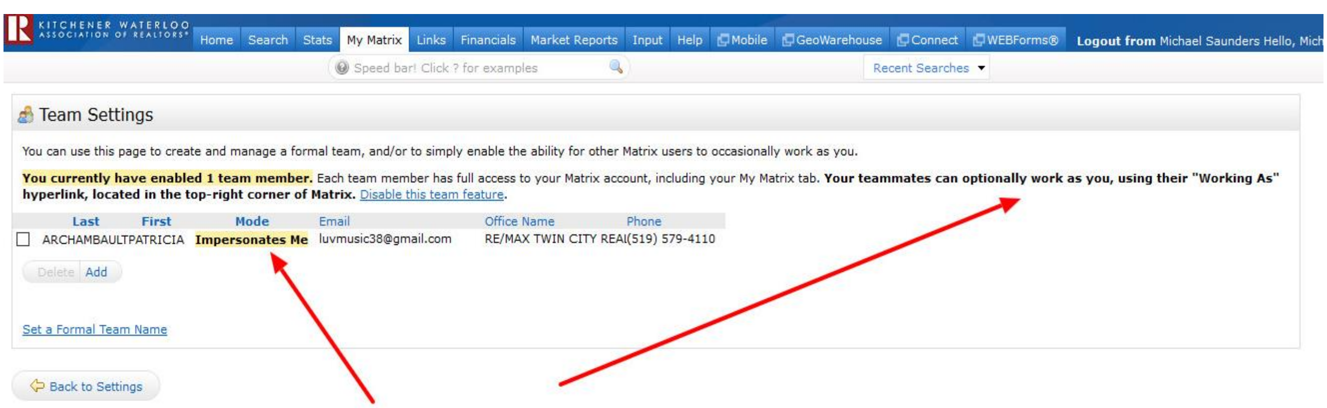

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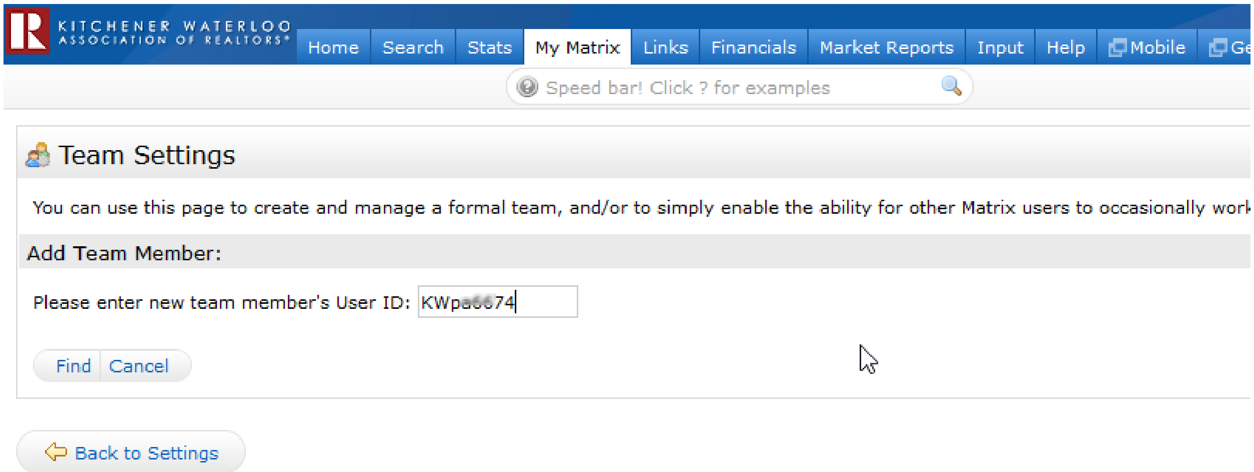

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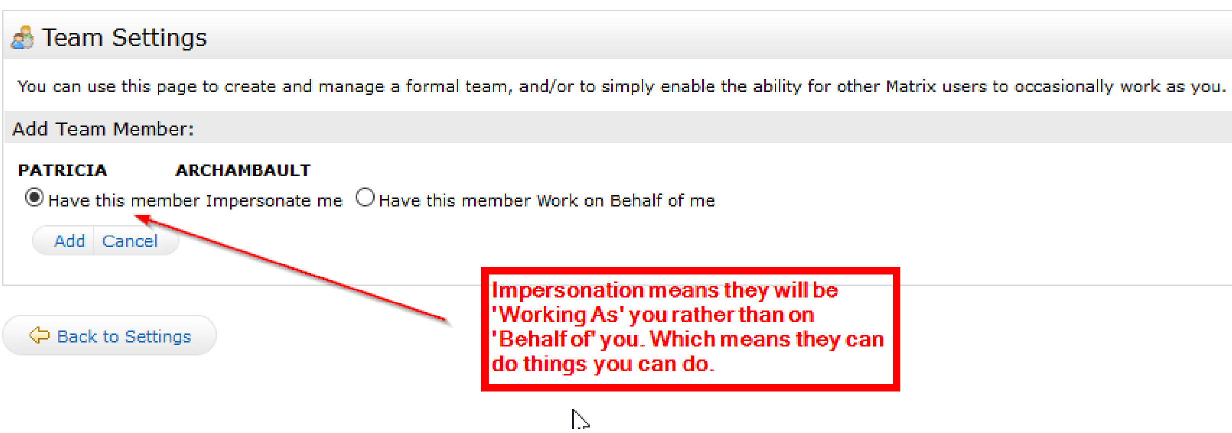

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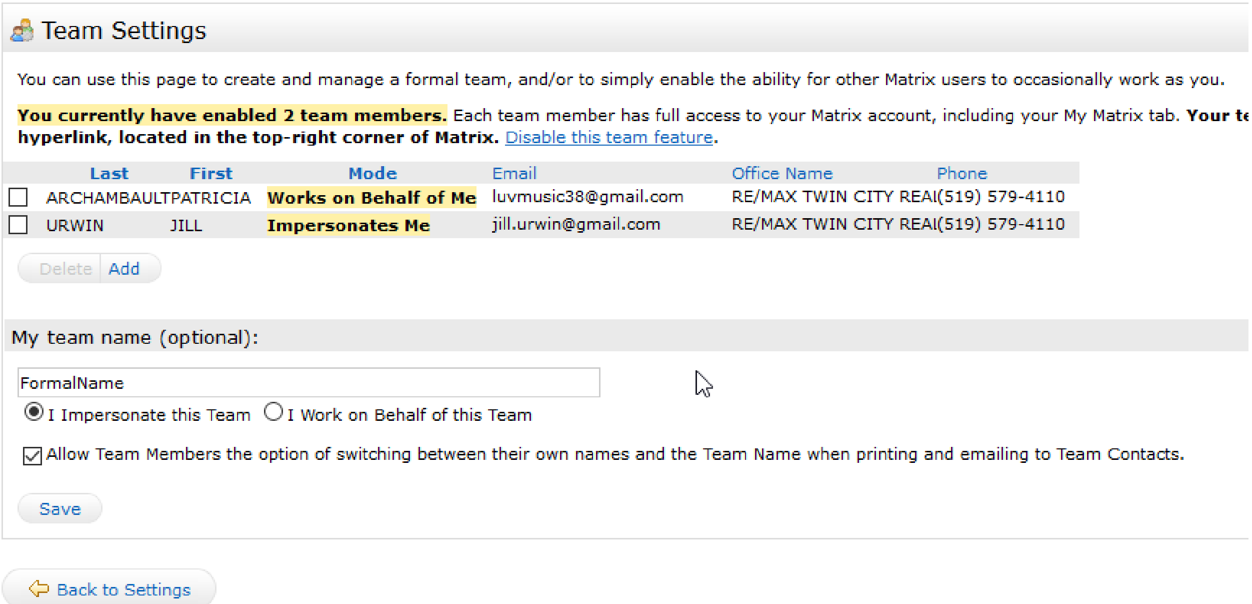

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- Disable the team function.

USING THE WORKING AS FUNCTIONALITY IN MATRIX

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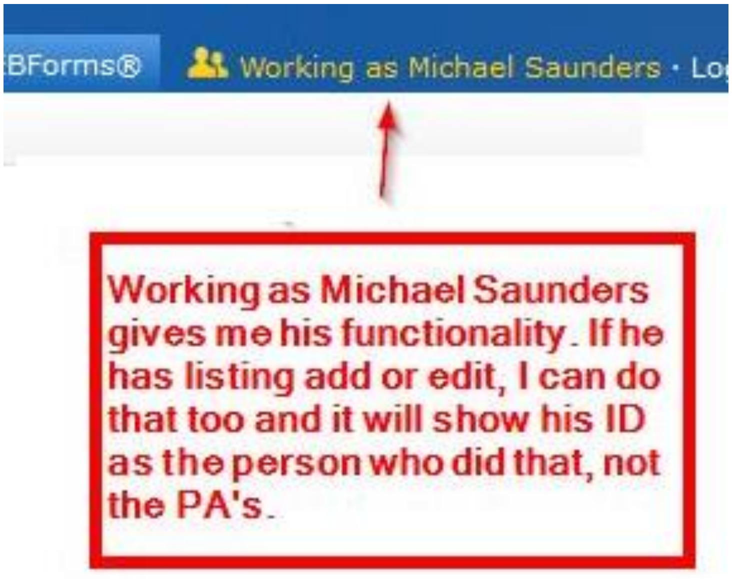

When one of your team members logs in, they can switch from their own individual login to the Team login by clicking on their name in the **upper right corner** of the screen to open the select popup. There they can click to select the team name (or your name if you did not create a team name).

They can now see in the **upper right (and highlighted in yellow on the Home page)** that they are working as the team. When they click on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to your (the Team's) items. When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone:

If they are set to impersonate you, they haves the same choice except that if they select the Team, it will use your email address, not theirs.

For assistants for brokerages and offices, the working as link allows them to impersonate any agent that gives them access.

You can see in the following screenshot that a BA or OF can actually be on more than one team or be allowed to work as more than one realtor. Teams are shown with a star before the team name.

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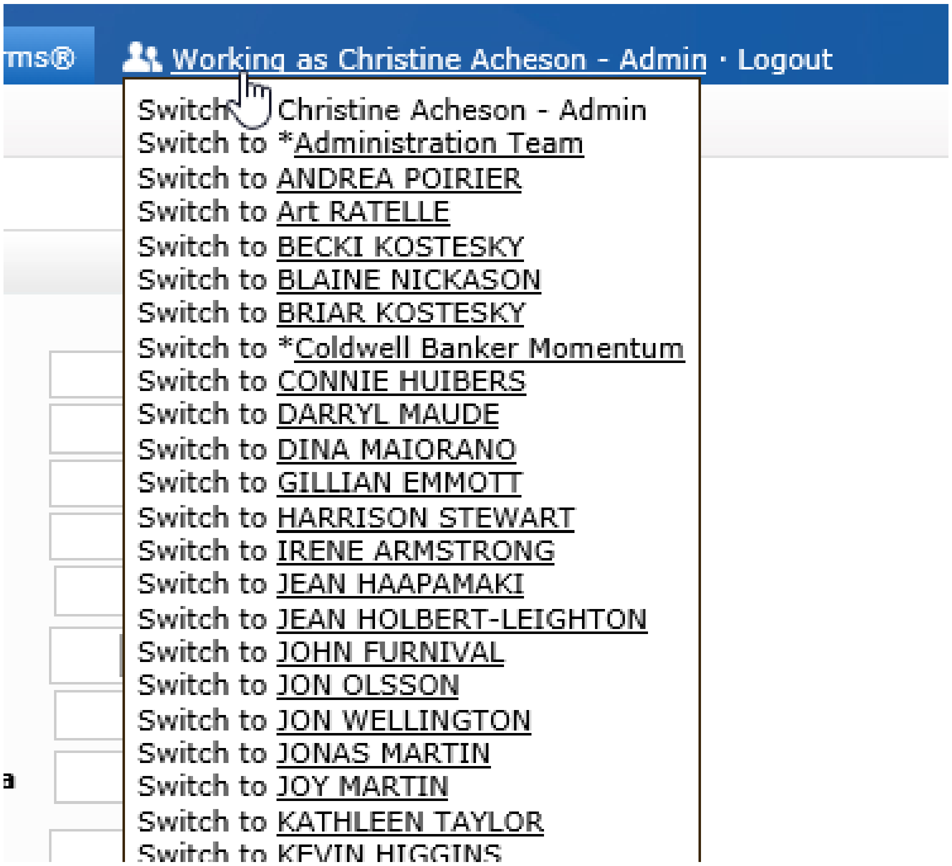

The best place to access the working as link is from the homepage, unfortunately it doesn't work in all tabs such as the settings tab.

To leave working as the team and go back to working as yourself, click the "Working as" link in the upper right of the screen and click to select your own name which is the first option in the dropdown list of names and the only one that is not underlined.

Once you've clicked on that link, you will no longer be impersonating anyone else and your access and permissions will revert to the assistant login level you started with.

Help on teams and other functionality in Matrix can always be found in the help menu tab under Matrix Training Guides.

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