

Exporting and Importing Contacts Guide

May 2023

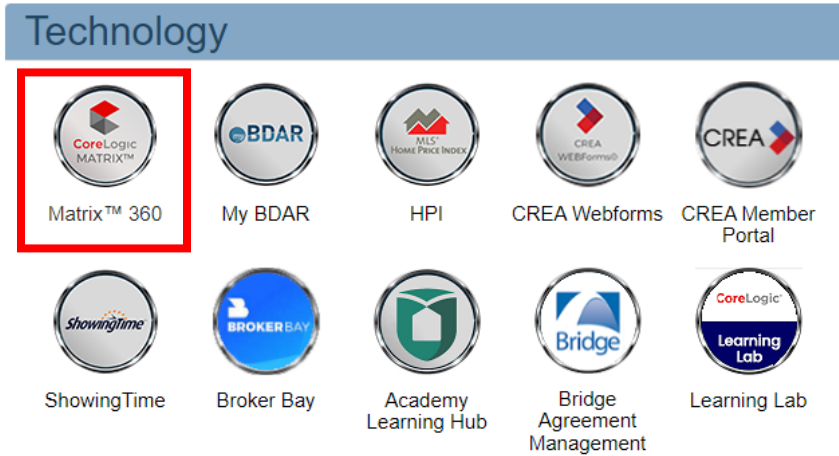
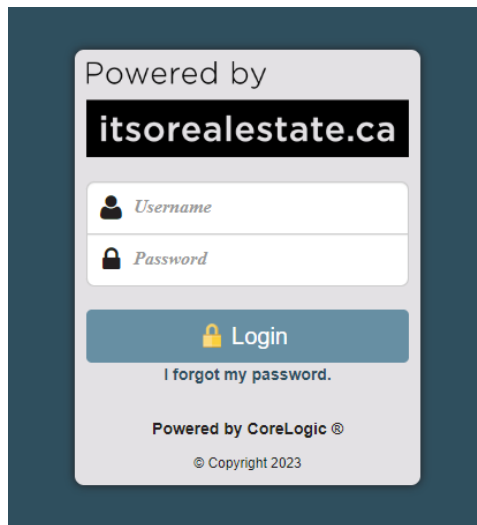
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EXPORTING CONTACTS FROM THE ITSO MLS® SYSTEM

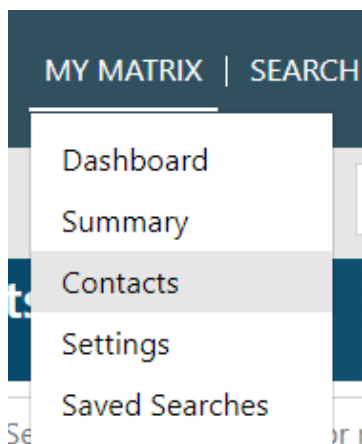
Step 1: Login to the ITSO MLS® System

Login with your BDAR credentials at itsorealestate.ca and select Matrix™ from your BDAR Dashboard



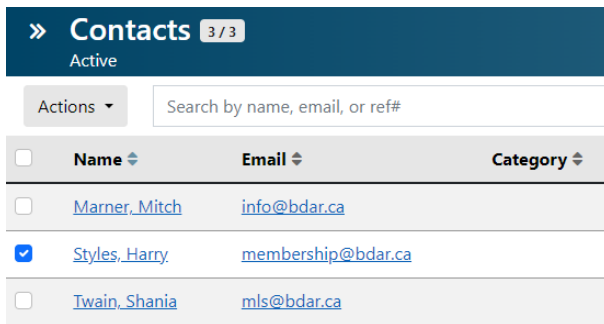
Step 2: Navigate to Your Contacts Page

Select 'MY MATRIX' > 'CONTACTS'

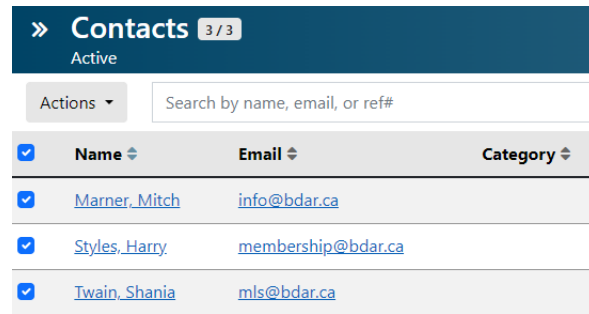


Step 3: Select the Contacts You Wish to Export

Select the check box beside each contact you wish to export, or select the top check box to select all contacts.



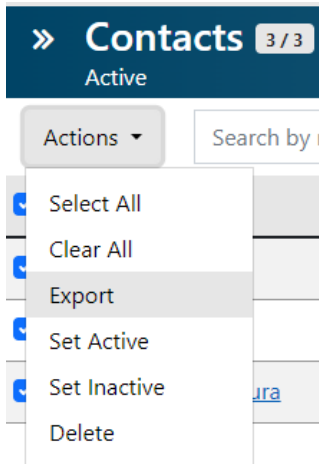
| <input type="checkbox"/> | Name ↕ | Email ↕ | Category ↕ |
|-------------------------------------|---------------|--------------------|------------|
| <input type="checkbox"/> | Marner, Mitch | info@bdar.ca | |
| <input checked="" type="checkbox"/> | Styles, Harry | membership@bdar.ca | |
| <input type="checkbox"/> | Twain, Shania | mls@bdar.ca | |



| <input checked="" type="checkbox"/> | Name ↕ | Email ↕ | Category ↕ |
|-------------------------------------|---------------|--------------------|------------|
| <input checked="" type="checkbox"/> | Marner, Mitch | info@bdar.ca | |
| <input checked="" type="checkbox"/> | Styles, Harry | membership@bdar.ca | |
| <input checked="" type="checkbox"/> | Twain, Shania | mls@bdar.ca | |

Step 4: Export Your Contacts

Select 'Actions' > 'Export' to generate and automatic .csv file download.



IMPORTING CONTACTS TO THE TORONTO MLS® SYSTEM'S MATRIX™ FRONT-END

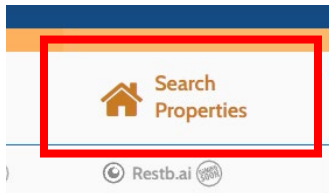
Step 1: Login to the Toronto MLS® System

Login with your TRREB ID, PIN, and authenticator at torontomls.net

A login form with a grey background. At the top, it says "Enter your User ID". Below this are three input fields: the first with a person icon and "Enter your User ID", the second with a magnifying glass icon and "Enter your PIN #", and the third with a padlock icon and "Enter your Authenticator Password". At the bottom is a blue button with a padlock icon and the text "Click Here to Log On".

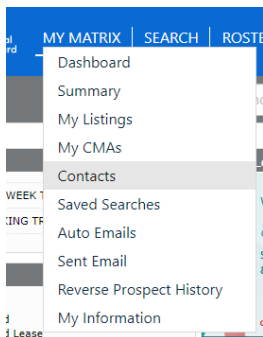
Step 2: Open the Matrix™ Front-End Platform

Select 'Search Properties' > 'Matrix'



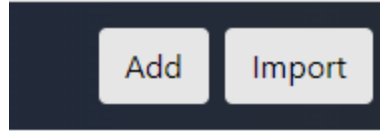
Step 3: Navigate to Your Contacts Page

Select 'MY MATRIX' > 'CONTACTS'



Step 4: Import Your Contacts

Select 'Import' on the right-hand side.



From here, you can select 'Choose File' and select the exact file just exported from the ITSO MLS® System. Then select 'Import' in the top right corner.



You also have the ability to download the .csv template to format your contact information if you are importing contacts from an alternative database.

IMPORTING CONTACTS TO THE TORONTO MLS® SYSTEM'S REALM™ FRONT-END

Step 1: Modify Your .csv File

The .csv file that was exported from the ITSO MLS® System is not automatically compatible with REALM™ and you will have to modify the column names within the file.

Compatible column names in REALM™ include:

| | | |
|--------------------|--------------------------------|-----------------------|
| FullName | HomePhone | Address2Country |
| FirstName | Address1Type | OrganizationName |
| MiddleName | Address1StreetNumberAndName | Url1Type |
| LastName | Address1UnitOrSuiteOrApartment | Url1 |
| Salutation | Address1City | Url2Type |
| SuffixName | Address1StateOrProvince | Url2 |
| Gender | Address1PostalCode | Url3Type |
| BirthDate | Address1Country | Url3 |
| Email | Address2Type | RelatedPersonFullName |
| EmailType | Address2StreetNumberAndName | RelatedPersonType |
| OtherEmail | Address2UnitOrSuiteOrApartment | Source |
| OtherEmailType | Address2City | SourceDescription |
| MobilePhone | Address2StateOrProvince | Title |
| WorkPhone | Address2PostalCode | |

You will only need to modify the column names that have information in them that you would like to import. Each contact must have an email or phone number to import. If you have an existing contact in REALM™ with the same email address, you will not be able to import them.

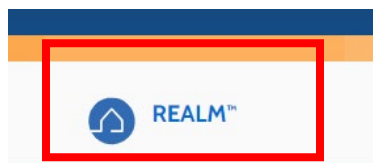
Once completed, ensure you save your .csv file to your computer.

Step 2: Login to the Toronto MLS® System

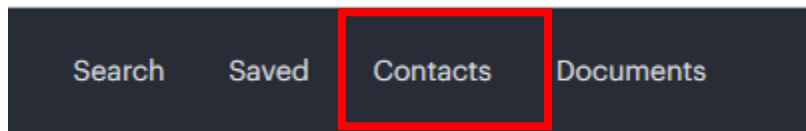
Login with your TRREB ID, PIN, and authenticator at torontomls.net

A login form with a grey background. At the top, it says "Enter your User ID". Below this are three input fields: the first has a person icon and "Enter your User ID", the second has a magnifying glass icon and "Enter your PIN #", and the third has a lock icon and "Enter your Authenticator Password". At the bottom is a blue button with a lock icon and the text "Click Here to Log On".

Step 3: Open the REALM™ Front-End Platform

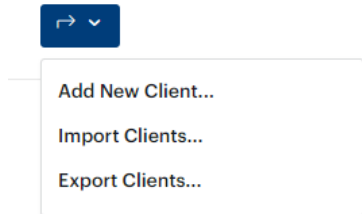


Step 4: Navigate to Your Contacts Page

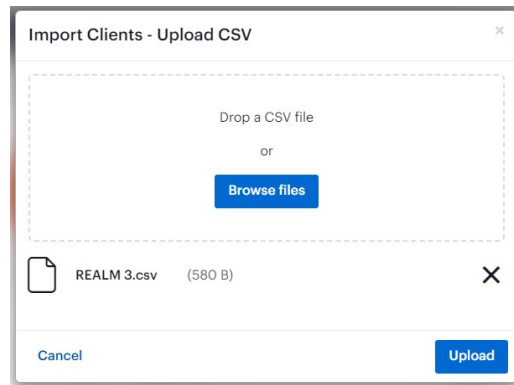
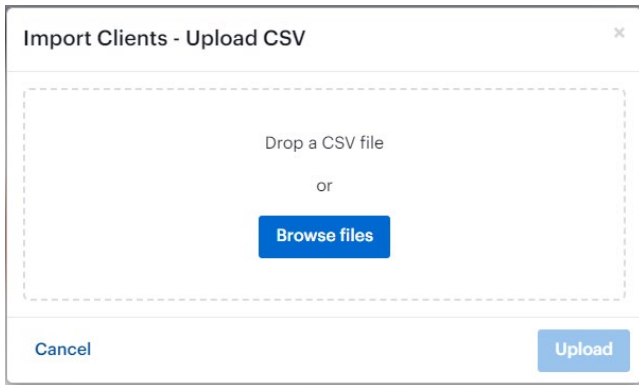


Step 5: Import Your Contacts

Upload your .csv file that you modified in step 1 to REALM™ by selecting the arrow in the top right and then 'Import Clients...'



From here, select 'Browse files', select your revised .csv file and then select 'Upload'.



Review the contacts that have been uploaded and then select 'Import' to finish.

