



Barrie & District  
Association of  
**REALTORS®**

# MATRIX™

## **Frequently Asked Questions**

Updated: March 2018



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## How To Access Matrix™

### Where do I log-in to Matrix™

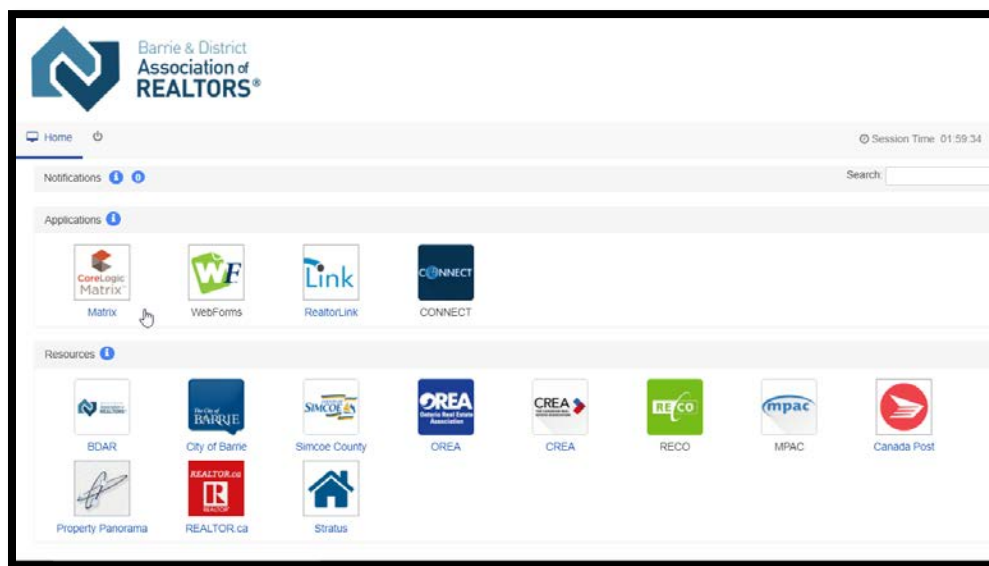
[www.onregional.ca](http://www.onregional.ca) will take you to the Matrix™ log-in page.

### How Do I log-in to Matrix™?

[Please Click Here to watch a video demonstrating how to log-in to Matrix™.](#)

## What is the SSO (Single Sign On) Dashboard/Page?

The Single Sign On (SSO) Dashboard is the main page you view once logged into Matrix™. This will give you access to various BDAR resources unique to BDAR members!



## What do I do when I am setting up Matrix® for the first time?

[Please click on here for a direct link to a video tutorial](#)

## Where Can I find a Matrix™ Quick Start Guide & Resources?

- [A Matrix™ Quick Guide Booklet can be found Here](#)
- [An introductory video for how to use & navigate Matrix™ can be found Here](#)
- [Additional BDAR generated resources for Matrix™ can be found Here](#)

## Forms

### Where can I find Matrix™ MLS® Data Forms?

Please click here to access the MLS® Data Forms for:

- [Residential Forms](#)
- [Commercial Forms](#)

You can also find these forms on WebForms™ by:

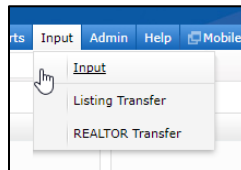
1. Logging into WebForms™
2. Select "Printable Forms" Tab

3. From the drop down menu on this page select “View Board Forms”
  - i. Here you will find forms for Matrix™

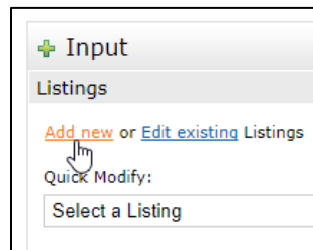
## Inputting Listings Into Matrix™

### How do I input a new listing into Matrix™?

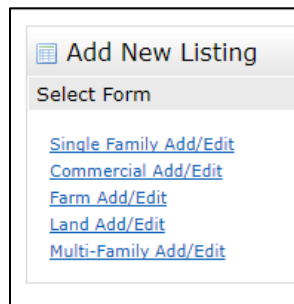
1. Select the Input Tab



2. Select Add New

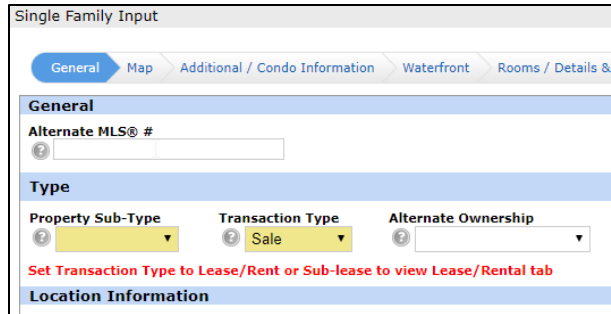



3. Select the property type you wish to input.



#### *Please Be Advised:*


- a. *You can not change the property type, once you selected it*
    - i. *I.E. You wanted to input a commercial listing but started typing under single family, you must exit the listing, select commercial and re-input the information.*
  - b. *Multi-Family properties are any residential property with two (2) or more units*
    - i. *i.e. Duplex, Triplex, Fourplex and so forth are to be input as Multi-Family*
4. All fields marked in yellow are mandatory and must be completed.

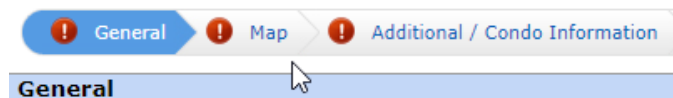


Beside each field in Matrix™ there is a grey icon , this is the help icon. When you click on it, a pop-up dialogue box will open with additional information.

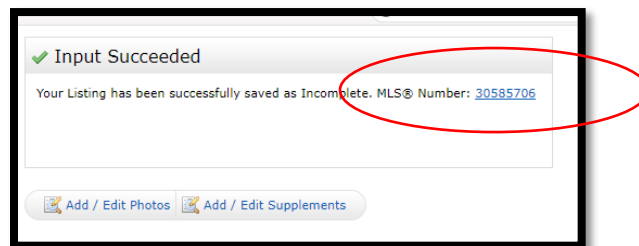
5. Once the listing is completed, select the submit button at the bottom of the page



6. Mandatory fields that are missing information after you click submit will have a red  icon beside them. You must complete these; except for the Map Tab (for the time being)

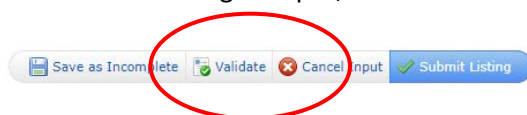


7. Once the listing information is corrected, select the submit button at the bottom of the page and an MLS® will be generated for you property
  - a. This will assign a Matrix™ MLS®# to the listing



### What is the Validate Icon on the Listing Input Scree?

1. Once listing is in-pu, select the validate button at the base of the screen



2. If "There were errors on the input form, this will display all of them.

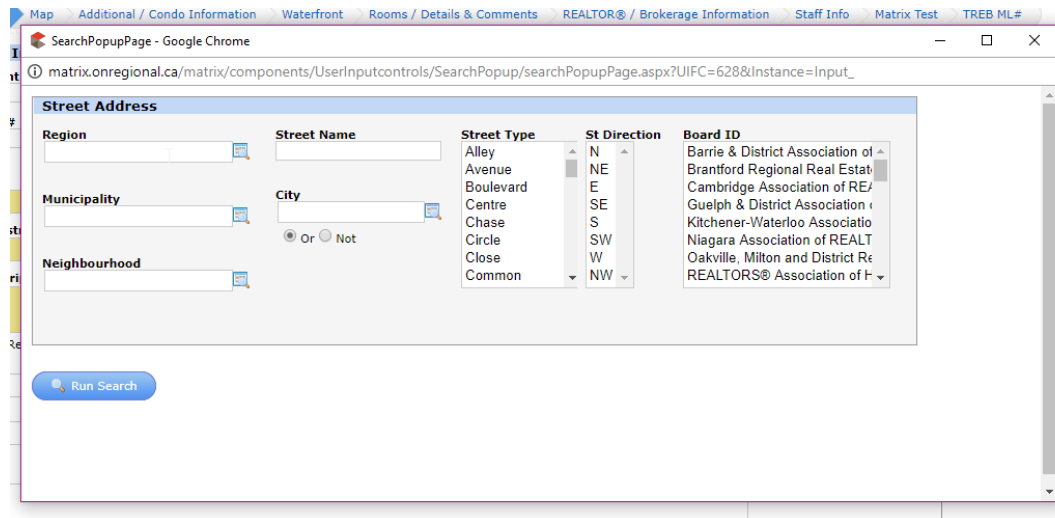
### What is the Street Table and How do I Use it?

1. When inputting a new listing and you are in the "General Tab"

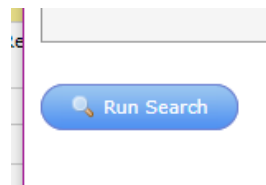
2. Click “Auto-Fill these Address Fields”



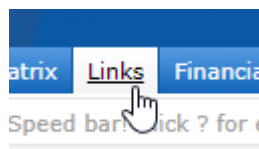
3. A new dialogue box will pop open on your computer screen
  - a. Begin inputting your Listing Address information



4. Select “Run Search” and select the result you wish to use for your listing



## Where Can I Find a Barrie and Simcoe County Interactive Map?



1. Click the Links tab
2. Scroll to the bottom of the screen and you will find links

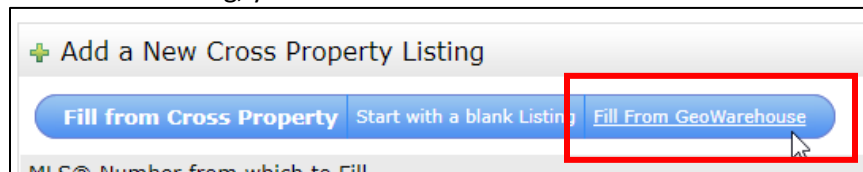


<a href="#">GO-Transit</a>	Other
<a href="#">Simcoe County Interactive Map</a>	Other
<a href="#">Simcoe County District School Board</a>	Other
<a href="#">Simcoe Muskoka Catholic School</a>	Other
<a href="#">French Catholic District School Board</a>	Other
<a href="#">Registered Second Suites</a>	Other

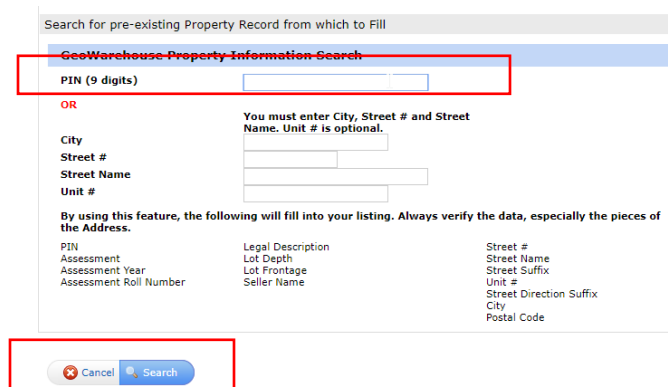
## What is the Geo-Warehouse Auto-Fill Feature for new listings?

When you start a new listing, you have the option to auto-populate some of the listing information by providing the PIN number for the property.

1. When you start a new listing, you must select “Fill From GeoWarehouse”



2. Input your 9-digit pin number and select search



3. Once your result(s) populate you can select the property and click “Fill”
4. You can now begin inputting information into your listing

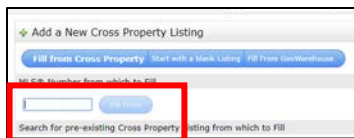


## How Do I Clone a Listing in Matrix™?

When starting to input a new listing into Matrix™ you have the option to clone a pre-existing on under the same address; providing you know the original MLS® number.

Under the Input Tab, once you selected:

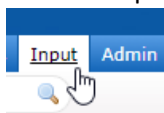
1. Add New
2. Select property Type
3. Input the Matrix™ MLS® listing number and select Fill from



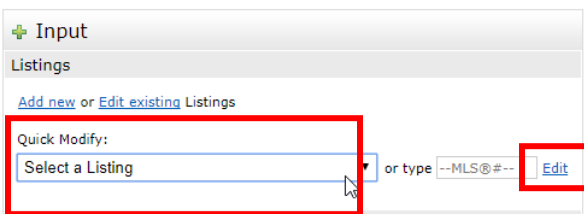
4. This will auto-populate some of the fields, though it is still your responsibility to verify the data.

## How Do I Edit a Listing Already In Matrix™?

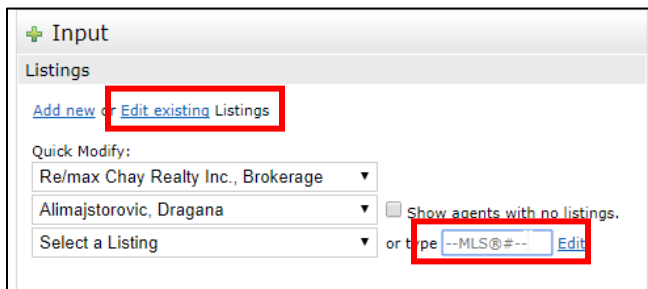
1. Log-in to Matrix™
2. Access Matrix™
3. Select the input tab



4. To edit listings already input into the MLS® System:
  - a. You can access your listings from the Quick Modify Drop Down Tab and select Edit



5. You Can Edit an existing listing by clicking the Link or Type the Matrix™ MLS® Number directly




[Click here for a video resource on how to in-put listings into Matrix™](#)

## What is a multi-family property?

Multi-Family properties are any residential property with two (2) or more units.

*I.e. Duplex, Triplex, Fourplex and so forth are to be input as Multi-Family*

## I don't know what to put in the various fields for my new listing... Where can I find information about what goes in each field?

Beside each field in Matrix™ there is a grey icon  , this is the help icon. When you click on it, a pop-up dialogue box will open with additional information.

## Additional Listing Input Help

[Please watch the video here on how to start/in-put listing information](#)

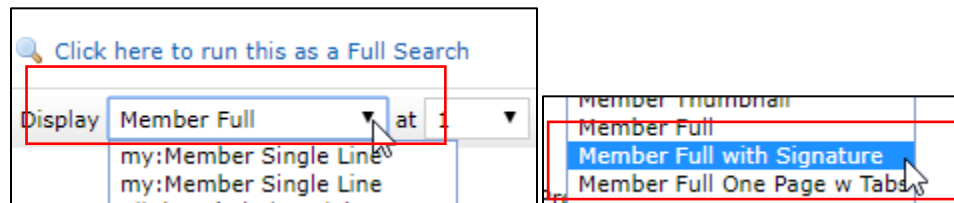
## REPORTS & FEATURE SHEETS

### What is the Signature Report in Matrix™?

The Signature Report Page in Matrix™ is listed as a feature sheet in which you can print completed listing information and a space for client signature(s) is provided as well.

To access this, you must:

1. Input listing information
2. Save the listing as incomplete
3. View the listing display section – Select Member Full with Signature



4. This page will show a display/feature sheet with signature spaces at the base of it. From here you can select print and print the content for the property.



### What are “Pop-Up” Blockers?

A “Pop-Up Blocker” is a program that prevents pop-ups from displaying in your Web browser, and may cause difficulties in information appearing if enabled in your internet browser.

### How do I disable a “Pop-Up” Blocker?

To disable this please review the following guides, based on the browser you are using.

[Please click on the browser icon that applies to you](#)



[Google Chrome](#)



[Safari](#)



[Internet Explorer](#)



[FireFox](#)

## REMARKS

### What do I include in the “Remarks for Clients”?

Information input here, will be visible to the public and will appear on Realtor.ca®; please refer to the information that can be input as per BDAR MLS® Rules & Regs.

As per BDAR MLS® Rules & Regulations - 2.21

*“Since there are areas within the MLS® Data Input Form where the Listing Brokerage may insert its contact information, including but not limited to, an area of the form, where the Listing Brokerage may insert virtual tour information and electronic links, including urls (if any), then subject to and without limiting the generality of Section 2.03 above: 2.12*

- a) only comments which provide pertinent information concerning the property shall be permitted in the public remarks section of any MLS® Listing with the exception of a direction to visit an unbranded link to obtain additional information; and”

Comments

Public Remarks

 Content input here displays on Realtor.ca®

Characters Remaining: 1458

### What do I include in the “Remarks for Brokerages”?


Information input here, will be visible to the public and will appear on Realtor.ca®; please refer to the information that can be input as per BDAR MLS® Rules & Regs.

As per BDAR MLS® Rules & Regulations - 2.21

*“Since there are areas within the MLS® Data Input Form where the Listing Brokerage may insert its contact information, including but not limited to, an area of the form, where the Listing Brokerage may insert virtual tour information and electronic links, including urls (if any), then subject to and without limiting the generality of Section 2.03 above: 2.12*

- b) only comments which provide pertinent information concerning the property, the showing of the property, the remuneration, the transaction or other factors impacting Co-operating Brokerages shall be permitted in the non-public remarks section of any MLS® Listing.

Private REALTOR® Remarks




Characters Remaining: 850


### What do I include in the “Inclusions” and/or “Exclusions” section of “Comments”?

These are optional fields, for:

**Inclusions:** You may input a list of items that are included in the purchase price of the property. Example: Appliances, outdoor items, window coverings, ETC.

**Exclusions:** You may input a list of items that are NOT included in the purchase price of the property.  
Example: TV & Mounts, Bar equipment, mirrors, ETC.

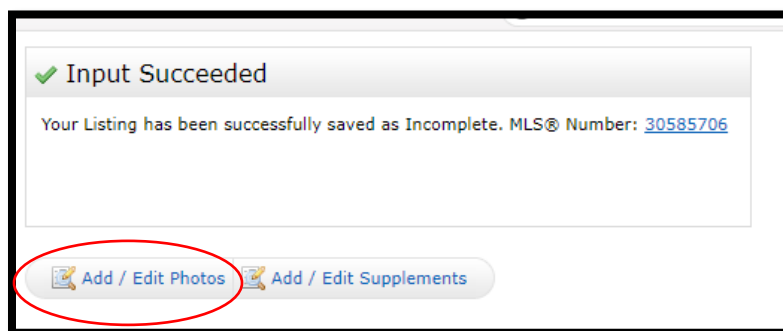
**Inclusions**  
  
  
Characters Remaining: 250

**Exclusions**  
  
  
Characters Remaining: 250

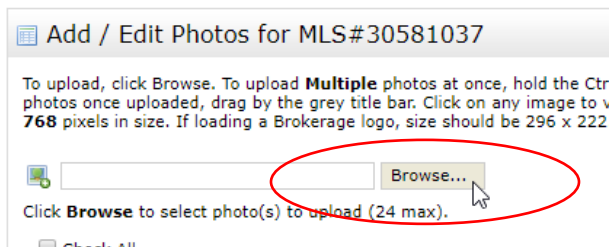
## PHOTOS

### How do I upload photos to my listing?

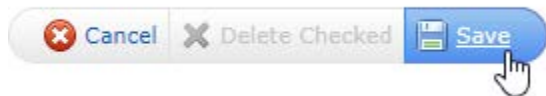
- After you input a new listing you can Select Add/Edit Photos



- Select Browse and find the image you just saved



- c. Select save at the bottom of the screen once photo is uploaded



*\*\*If the photo is marked in red in Matrix; it is warning you the quality of the image is weaker than the system recommended size, (example below):*



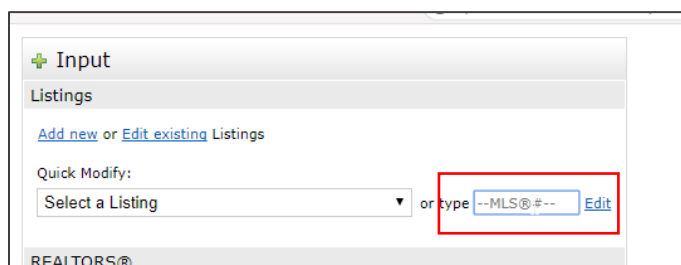
## What do I do if My Photos Aren't Showing on Realtor.ca®?

Delete and re-upload the main image of the property. This will trigger the entire listing to be re-updated on Realtor.ca® in the next 6 to 8 hours.

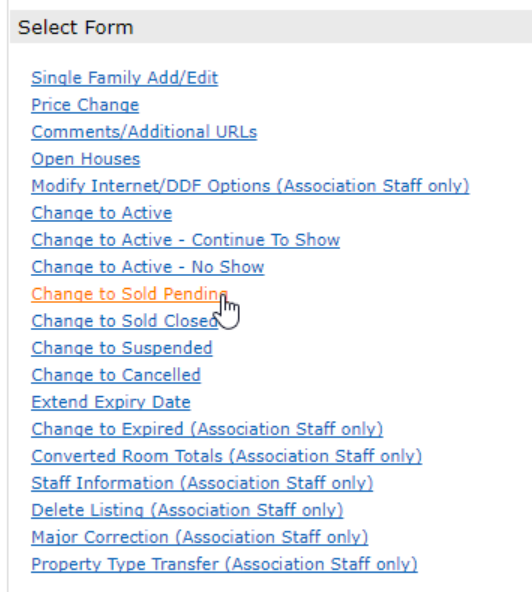
## REPORTING SOLD LISTINGS

### How do I report a listing as SOLD on MATRIX™?

1. Select Input Tab
2. Type the MLS® you want to report as sold into to highlighted box (as shown)



3. Select “Change to Sold Pending” – it will open a screen allowing you to input sale information.



Select Form

- [Single Family Add/Edit](#)
- [Price Change](#)
- [Comments/Additional URLs](#)
- [Open Houses](#)
- [Modify Internet/DDF Options \(Association Staff only\)](#)
- [Change to Active](#)
- [Change to Active - Continue To Show](#)
- [Change to Active - No Show](#)
- [Change to Sold Pending](#)
- [Change to Sold Closed](#)
- [Change to Suspended](#)
- [Change to Cancelled](#)
- [Extend Expiry Date](#)
- [Change to Expired \(Association Staff only\)](#)
- [Converted Room Totals \(Association Staff only\)](#)
- [Staff Information \(Association Staff only\)](#)
- [Delete Listing \(Association Staff only\)](#)
- [Major Correction \(Association Staff only\)](#)
- [Property Type Transfer \(Association Staff only\)](#)

### Who Can See a Sold Conditional Price in Matrix™?

The Sold price of a listing is suppressed from all client displays until closed; otherwise it is shown to members on the MLS® System.

## SEARCHES IN MATRIX™

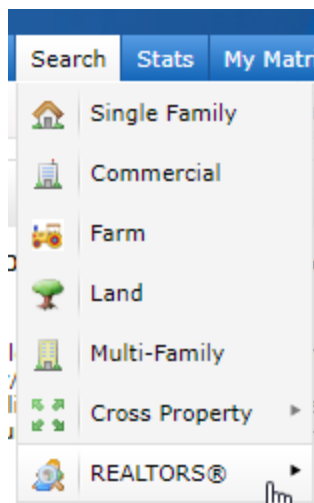
### How do I search in Matrix™?

[Please click here to watch a video tutorial on how to search Matrix™.](#)

### How can I search the Member Roster to find a specific Salesperson and their Brokerage?

1. Select “Search” Tab
2. Select REALTORS®





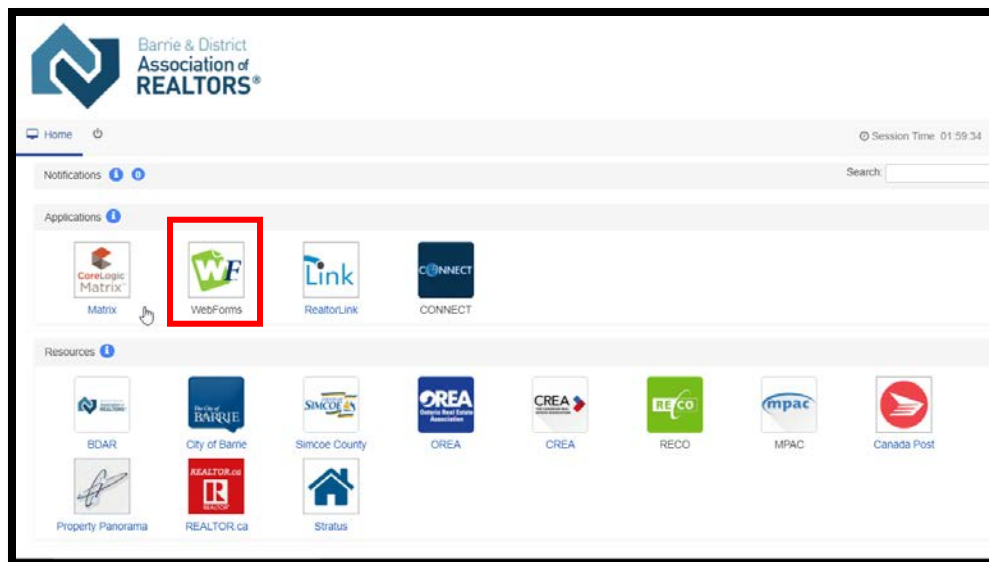
3. Input the Realtor® information you are seeking and click search.

## WEBFORMS™

### How do I access WebForms™?

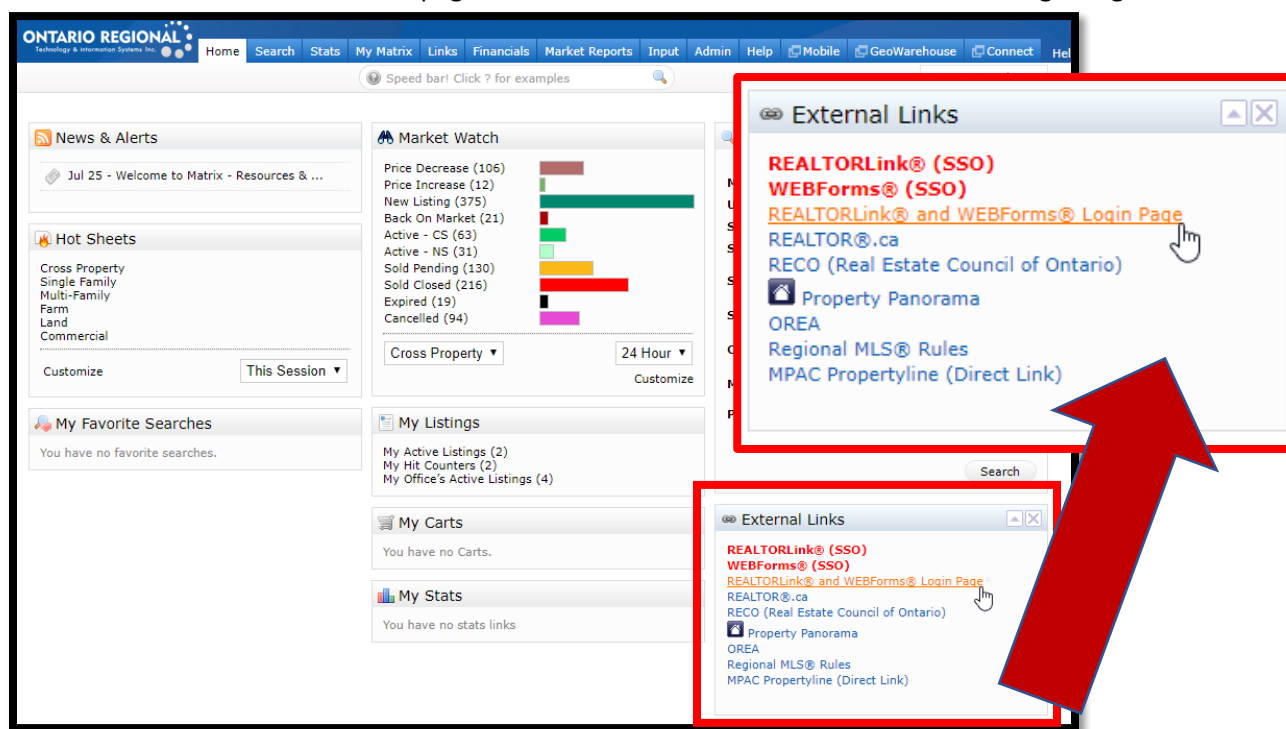
#### Method 1: From the SSO Dashboard

1. Log into Matrix™
2. You can access Webforms™ from the SSO Dashboard



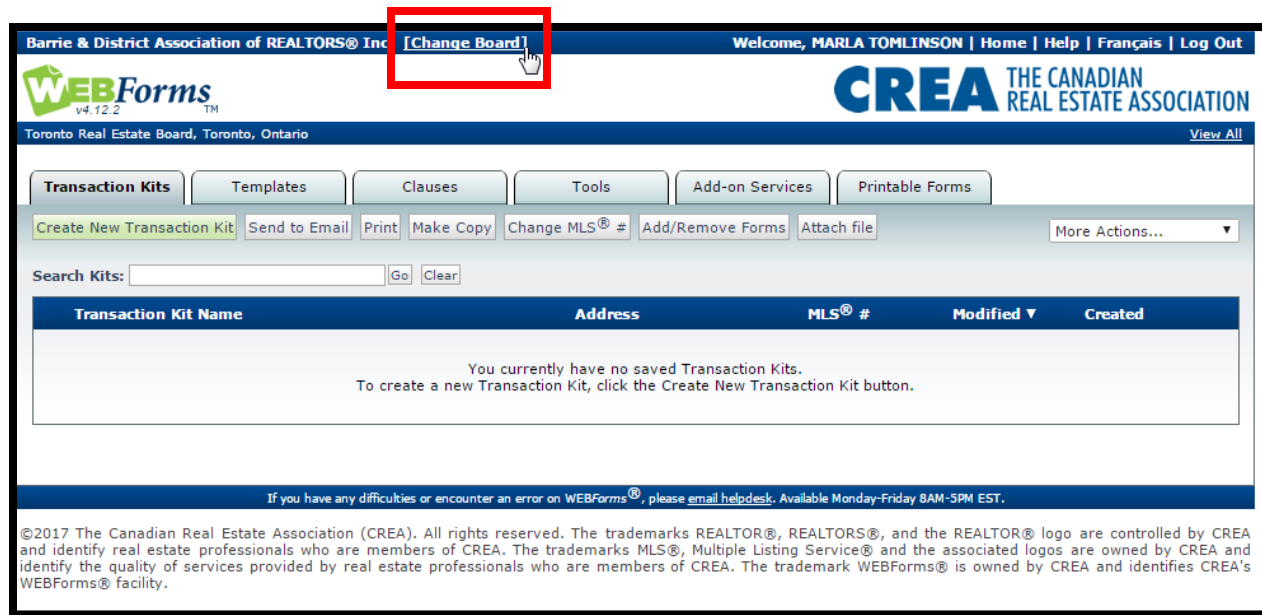
### Method 2: Once already in Matrix™

1. Stay on the Home Tab in Matrix™
2. Scroll to the bottom of the page and click on “RealtorLink™ and WEBforms™ Login Page”

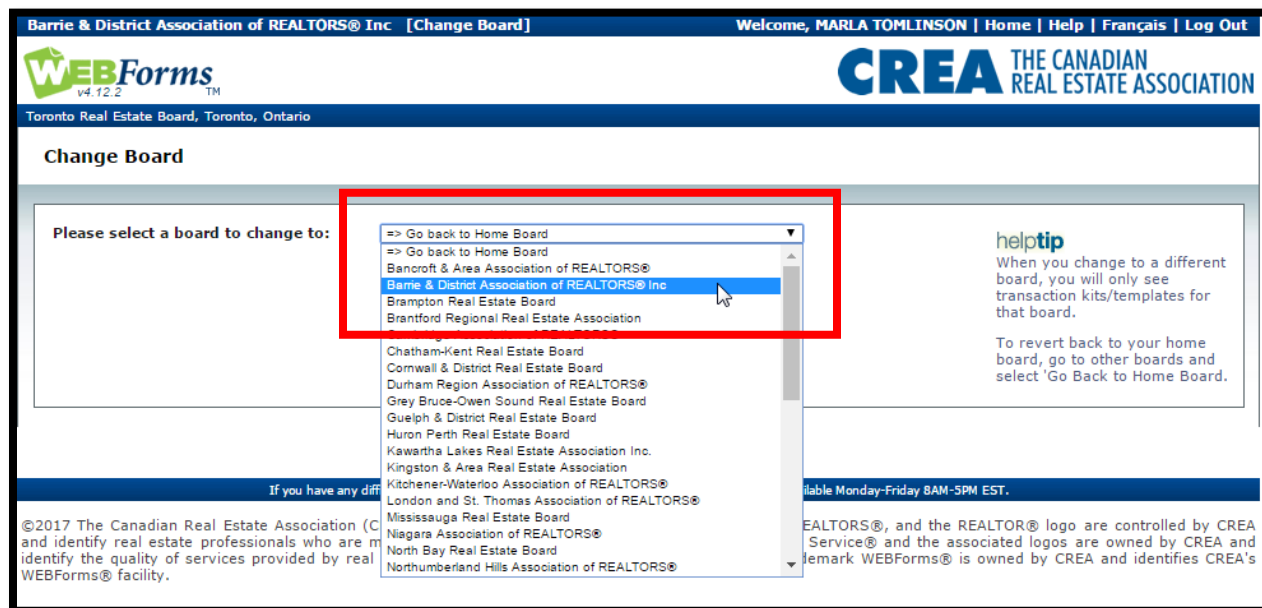


### How do I view BDAR Forms on WebForms™?

1. If you do not see BDAR information displayed, then you may have to change the Board. As shown below, click on the [Change Board] Button.



2. Select the Board of Choice, in this situation Barrie & District Association of REALTORS® Inc.




3. Select "Printable Forms" Tab
4. From the drop down menu on this page select "View Board Forms"
  - i. Here you will find forms for ORTIS (Ontario Regional)

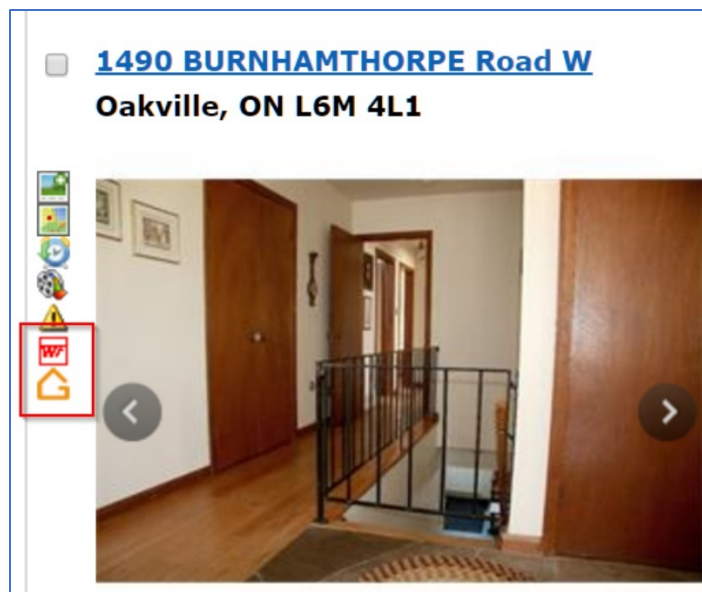
## GEOWAREHOUSE

### How and where do I access GeoWarehouse? (Method 1)

1. Log into Matrix™

- From any listing detail view, you must look for the GeoWarehouse icon , click on this and it will take you through to the GeoWarehouse information about that specific property

	MLS #	St	PST	Address	Price Municipality (Area)	Neighbourhood	City	SqFt	Beds	Baths	DOM	List Date	
	30577998	A	FRH	1490 BURNHAMTHORPE Rd W	\$29,510,000 1 - Oakville	1012 - NW Northwest	Oakville	1,500	3	2.0	126	03/23/2017	
	30579715	A	FRH	1092 ARGYLE Dr	\$16,988,000 1 - Oakville	1011 - MO Morrison	Oakville	7,889	6	7.2	45	06/12/2017	
	30562240	A	FRH	302 BURGUNDY Dr	\$12,800,000 1 - Oakville	1011 - MO Morrison	Oakville	15,036	10	5.1	133	03/16/2017	



## How and where do I access GeoWarehouse? (Method 2)

Log into Matrix™ and click on the tab up top which takes the member to their dashboard for the application

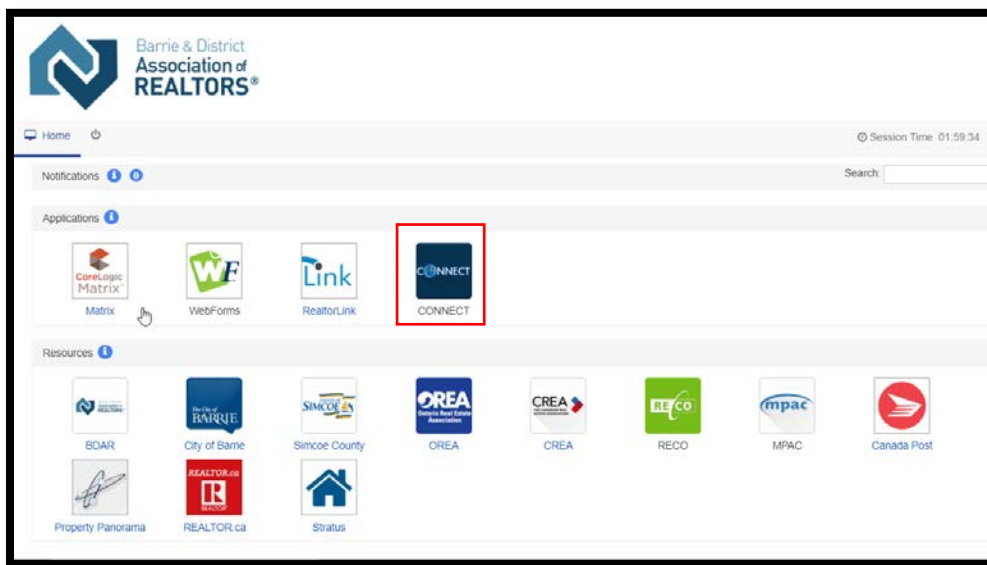


## CONNECT

### How do I access Connect? (Method 1: From the SSO Dashboard)

- Log into Matrix™

- You can access Connect from the SSO Dashboard

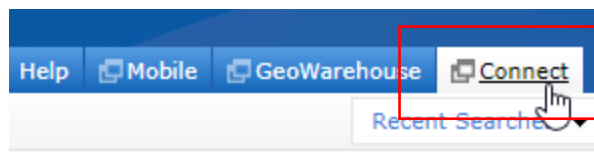


- Once logged into Connect, if your Board is not already set to Barrie & District Association of Realtors® (BDAR) Inc. then click Select Board and select BDAR.



### How do I access Connect? (Method 2)

Log into Matrix™ and click on the tab up top which takes the member to their dashboard for the application



Once logged into Connect, if your Board is not already set to Barrie & District Association of Realtors® (BDAR) Inc. then click Select Board and select BDAR.



### How do I search in Connect?

To search for Simcoe County and Barrie listings using Connect

1. On the next screen, enter your search criteria and click on “Search”; be sure to include the “City or Municipality” of interest.



CONNECT  
Unified Search  
Search Criteria

MLS#: \_\_\_\_\_

Price Range: 325,000 to 450,000

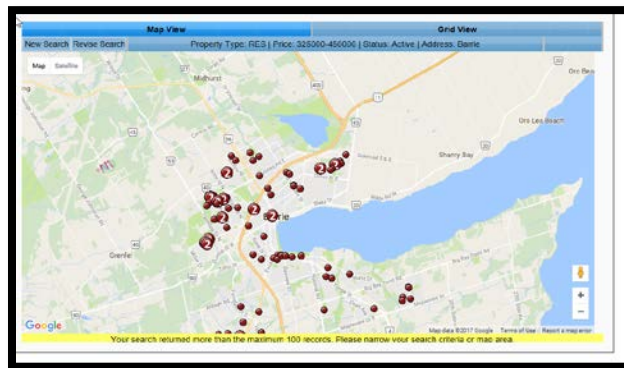
Property Type: ☒ Residential ☐ Land ☐ Condominium ☐ Lease ☐ Multi-Family ☐ Farm ☐ Commercial

Status: ☒ Active ☐ Sold

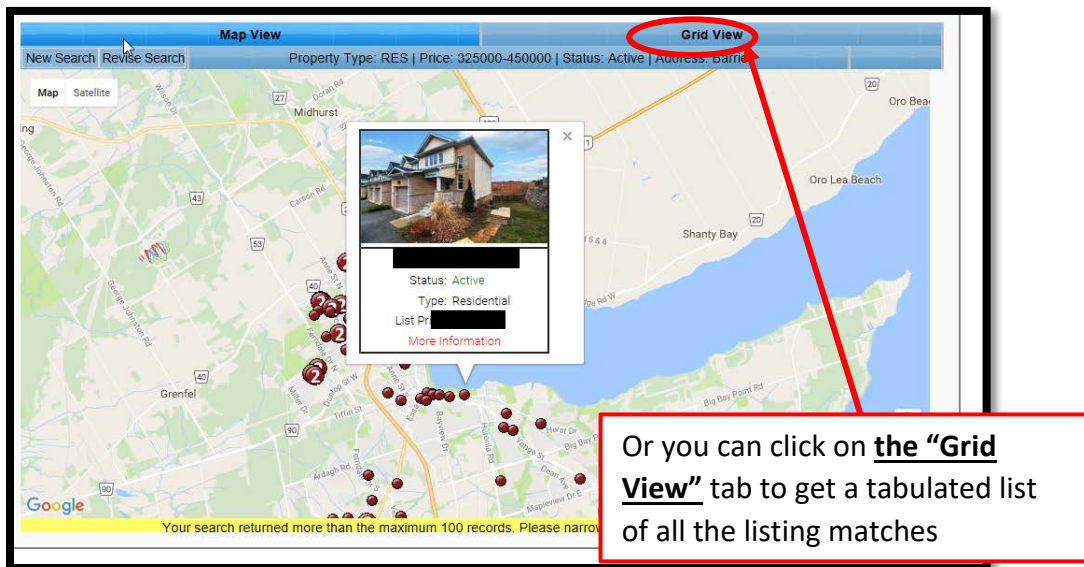
Address: Barrie  
(Street address)  
(Postal code)

Search

2. The results of your search will come up as an interactive map.



3. You can click on the red dots to view the individual listings.



## Are Branded Virtual Tours allowed on Matrix™?

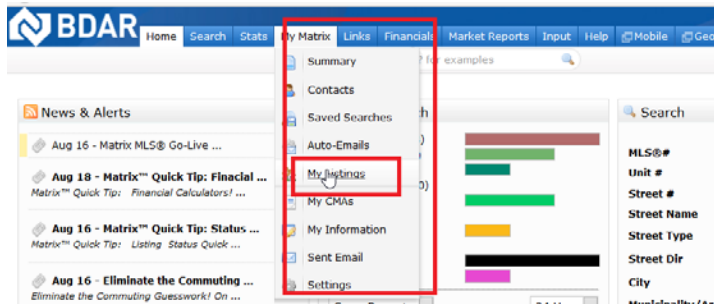
Please be advised **BRANDED VIRTUAL TOURS** are **NOT PERMITTED** on the MLS® System.



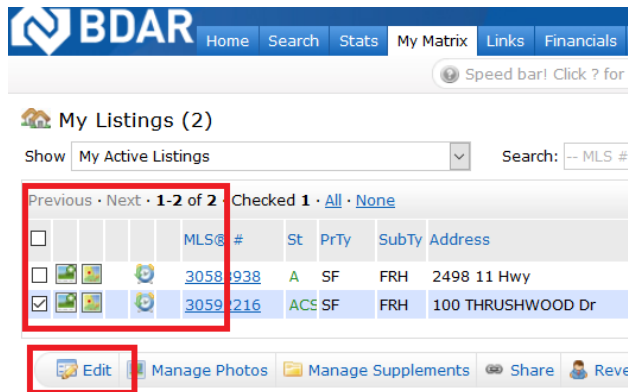
This is an industry standard that is being honored. Branded tours and feature sheets are permitted only on sources external to Matrix™ (i.e. Realtor.ca®).

## How do I Add a Virtual Tour?

1. Go to My Matrix, My Listings



2. From the results page, select the listing you wish to add the virtual tour to, and click edit.





- On the Modify Listings page, select “Comments/Additional URLs”


**Modify Listing**

**MLS#: 30592216      100 THRUSHWOOD I**  
**Sale**



**MLS #:** 3059  
**Type/Style:** Single  
**Category/Use:** /  
**Municipality:** BA - E  
**Neighbourhood:** BA11  
**Age:** 6-15  
  
**Lot Front:** 27 Ft  
  
**Sellers:**  
**L SP:**  
**L Brkr:**

**Select Form**

[Single Family Add/Edit](#)  
[Price Change](#)  
[Comments/Additional URLs](#)  
[Open House](#)  
[Change to Active](#)  
[Change to Active - Continue To Show](#)  
[Change to Active - No Show](#)  
[Change to Sold Pending](#)  
[Change to Sold Closed](#)  
[Change to Suspended](#)  
[Change to Cancelled](#)  
[Extend Expiry Date](#)

- Scroll down until you see the “Virtual Tours URLs” field. Enter your listing’s unbranded Virtual Tour link for it to appear on Matrix and click “Submit Listing” . You can also add a branded virtual tour, but this will not appear on Matrix.

**Virtual Tour URLs**

Virtual Tour URL Unbranded

Virtual Tour URL Branded

Virtual Tour 2 URL Unbranded

Virtual Tour 2 URL Branded

**Additional URLs**

Additional Images URL

Alternate Feature Sheet URL

Map Service URL

Sales Brochure URL

## Using Impersonation in Matrix

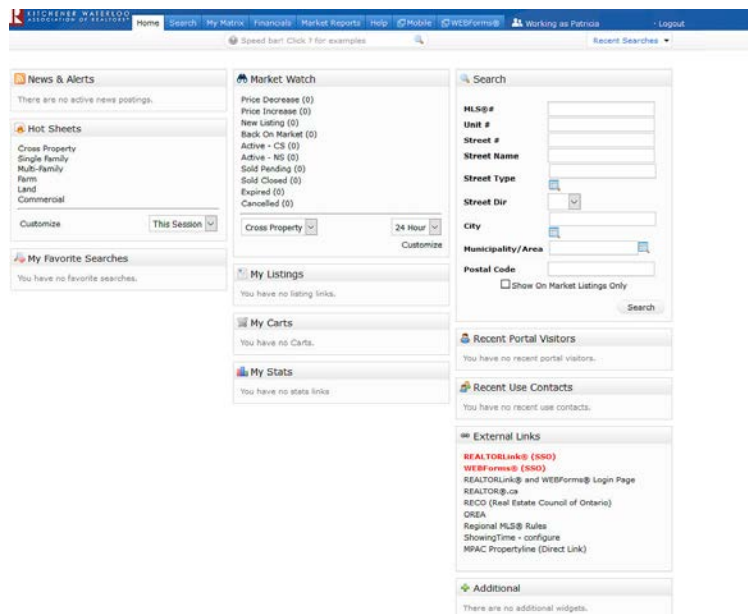
### Personal Assistants in Matrix

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™.

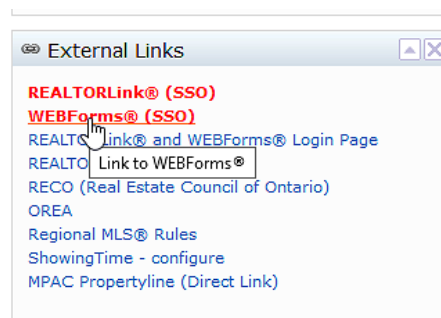
But the assistant only has some basic functions he or she can perform as themselves until they are set-up in Matrix™.

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 by 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®.



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

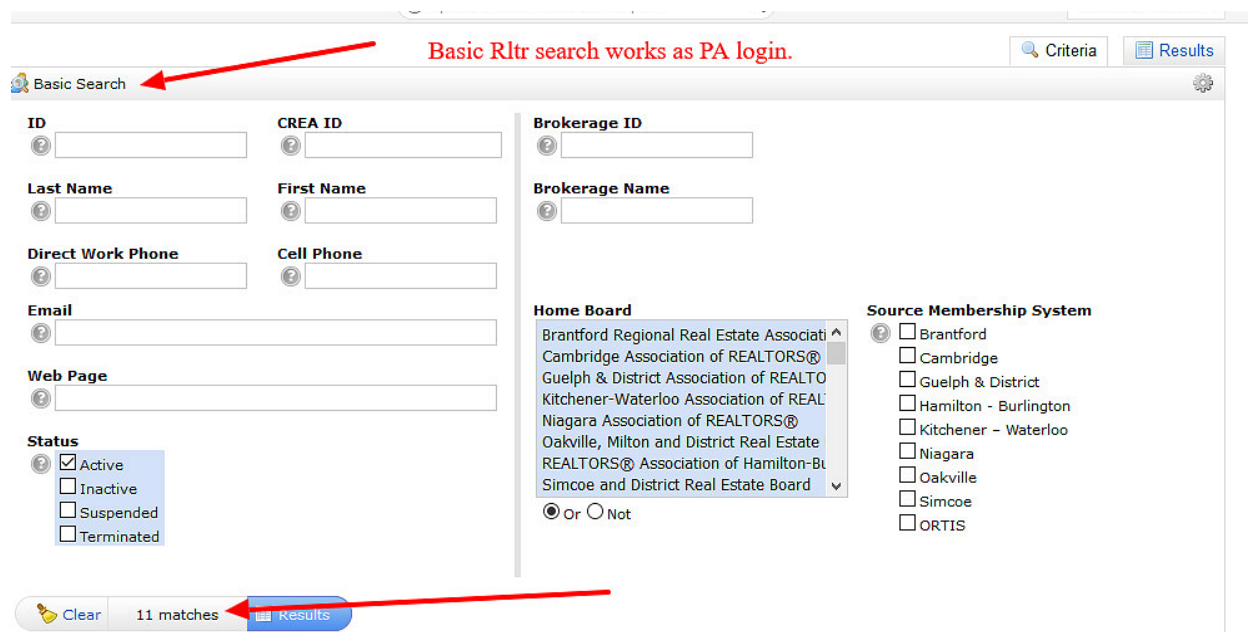


**We're sorry, your request could not be processed at this time.**

Please click the **Back** button in your browser and try again later.  
If you'd like, click here to go the [Home](#) page.

**If this problem persists, try closing your browser and logging back into Matrix.**

When logged in as a PA login (not impersonating/sharing identity with a Realtor® ), you can only search against the realtor or office tables.



Basic Rltr search works as PA login.

Basic Search

ID  CREA ID  Brokerage ID

Last Name  First Name  Brokerage Name

Direct Work Phone  Cell Phone

Email

Web Page

Status

☒ Active

☐ Inactive

☐ Suspended

☐ Terminated

Home Board

Brantford Regional Real Estate Association

Cambridge Association of REALTORS®

Guelph & District Association of REALTORS®

Kitchener-Waterloo Association of REALTORS®

Niagara Association of REALTORS®

Oakville, Milton and District Real Estate Association

REALTORS® Association of Hamilton-Burlington

Simcoe and District Real Estate Board

☒ Or ☐ Not

Source Membership System

☐ Brantford

☐ Cambridge

☐ Guelph & District

☐ Hamilton - Burlington

☐ Kitchener - Waterloo

☐ Niagara

☐ Oakville

☐ Simcoe

☒ ORTIS

Clear 11 matches Results

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.

The 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. (See Page 28 for Details).

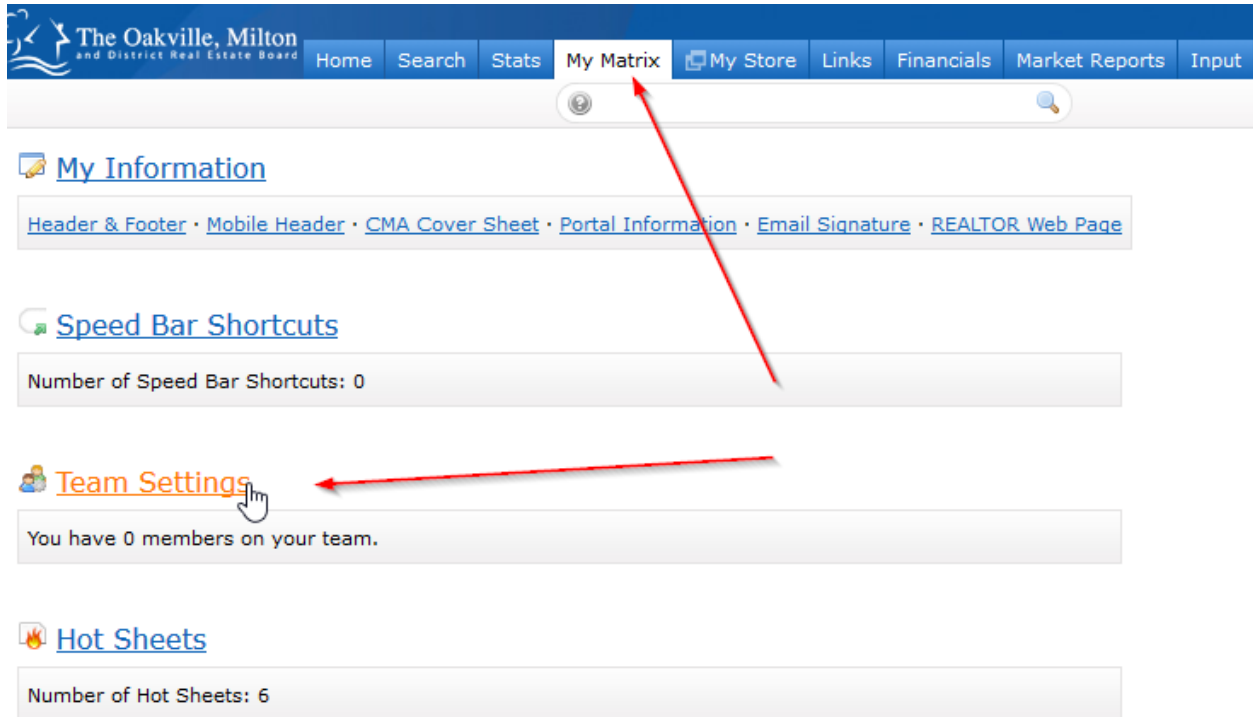
## Assistants in Matrix

### Brokerage and Office Assistants in Matrix

You have an assistant and want them to be able to enter and edit listings, send out emails, add contacts, set up searches and so on for your office or brokerage in Matrix™.

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

And by setup in Matrix™, 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.

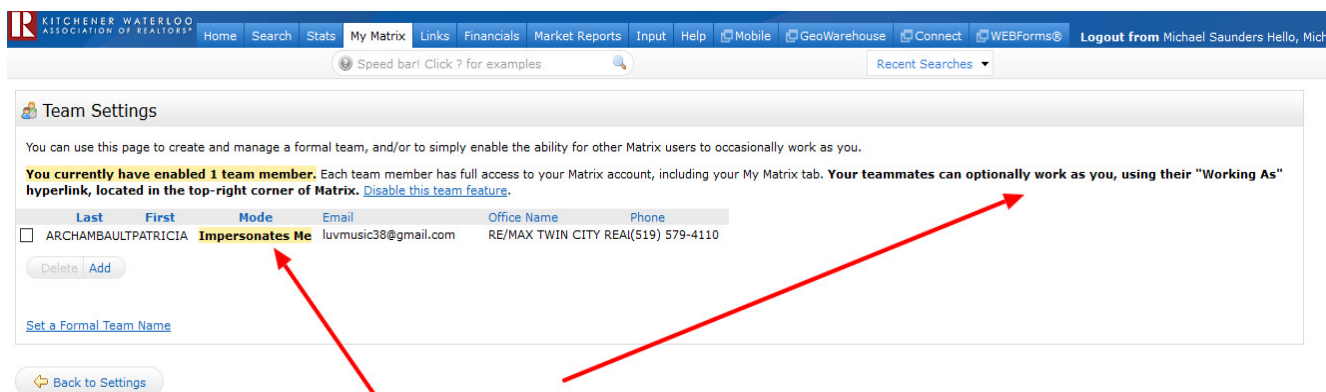


The Brokerage and Office Level assistant logins can be setup to work as single realtors/brokers or to work as a team that have been named and setup by a higher login. There is really no point in setting up a team on an assistant login as all they could do would be to give the same reduced functionality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

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.

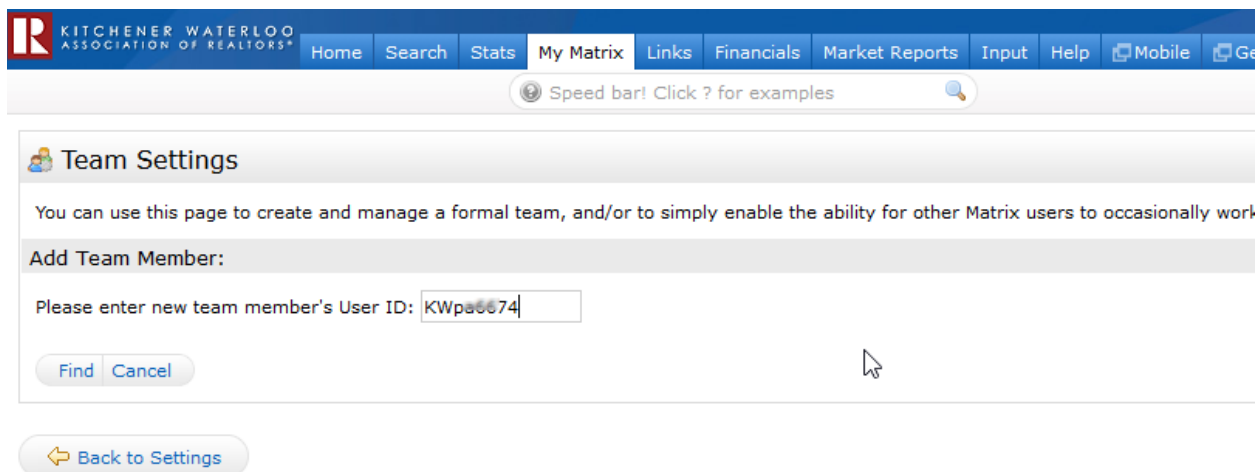
### Working on Behalf of An Agent

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)

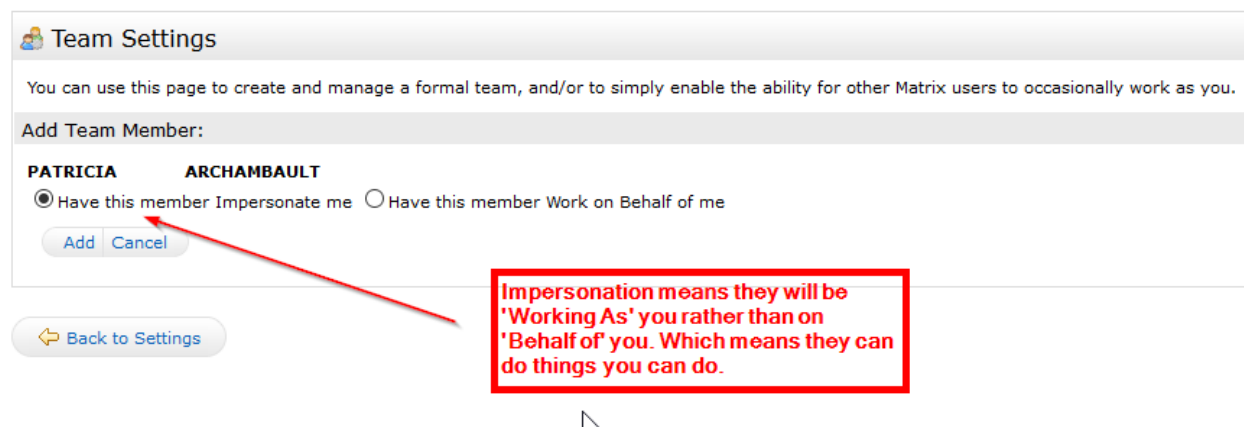
### How to set up a team (Realtor side of setup)

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.

 Team Settings

You can use this page to create and manage a formal team, and/or to simply enable the ability for other Matrix users to occasionally work as you.

**You currently have enabled 2 team members.** Each team member has full access to your Matrix account, including your My Matrix tab. **Your team hyperlink, located in the top-right corner of Matrix.** [Disable this team feature.](#)

	Last	First	Mode	Email	Office Name	Phone
<input type="checkbox"/>	ARCHAMBAULT	PATRICIA	Works on Behalf of Me	luvmusic38@gmail.com	RE/MAX TWIN CITY REAL	(519) 579-4110
<input type="checkbox"/>	URWIN	JILL	Impersonates Me	jill.urwin@gmail.com	RE/MAX TWIN CITY REAL	(519) 579-4110

My team name (optional):
 

☒ I Impersonate this Team
 ☐ I Work on Behalf of this Team

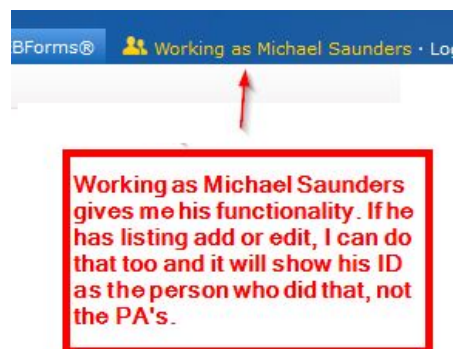
☒ Allow Team Members the option of switching between their own names and the Team Name when printing and emailing to Team Contacts.

### 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 unchecking this box.
- Disable the team function.

### Using the Working As functionality in Matrix

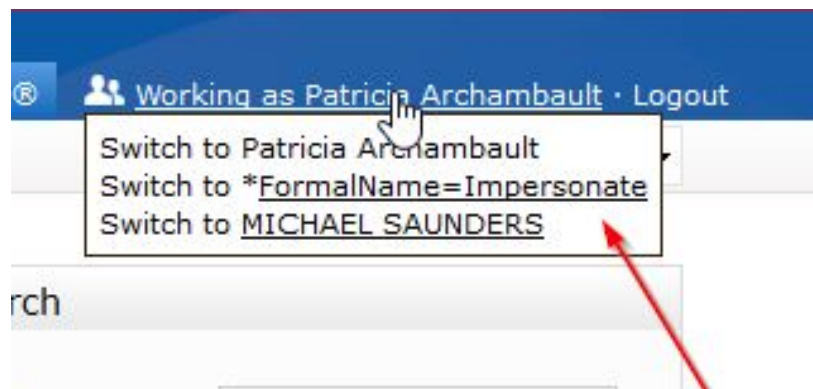
After enabling the Team function, you will be alerted to it on the **Home page each time you log in:** A link is included to go straight to the Team Settings screen.





When one of your team members logs in, they can switch from their own individual login to 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).

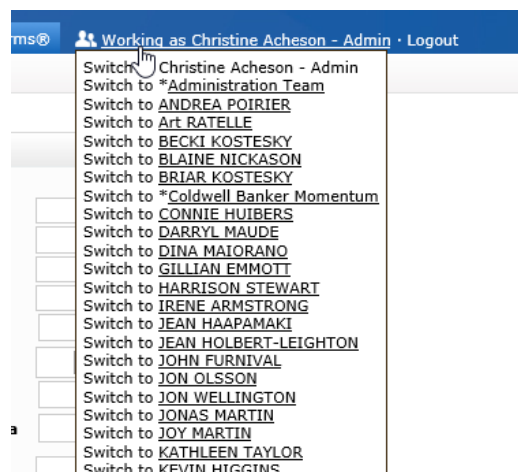
They can now see in the **upper right (and highlighted in yellow on the Home page)** that they are working as the team. When they click on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to your (the Team's) items. When sending an email, if they 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 have 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.

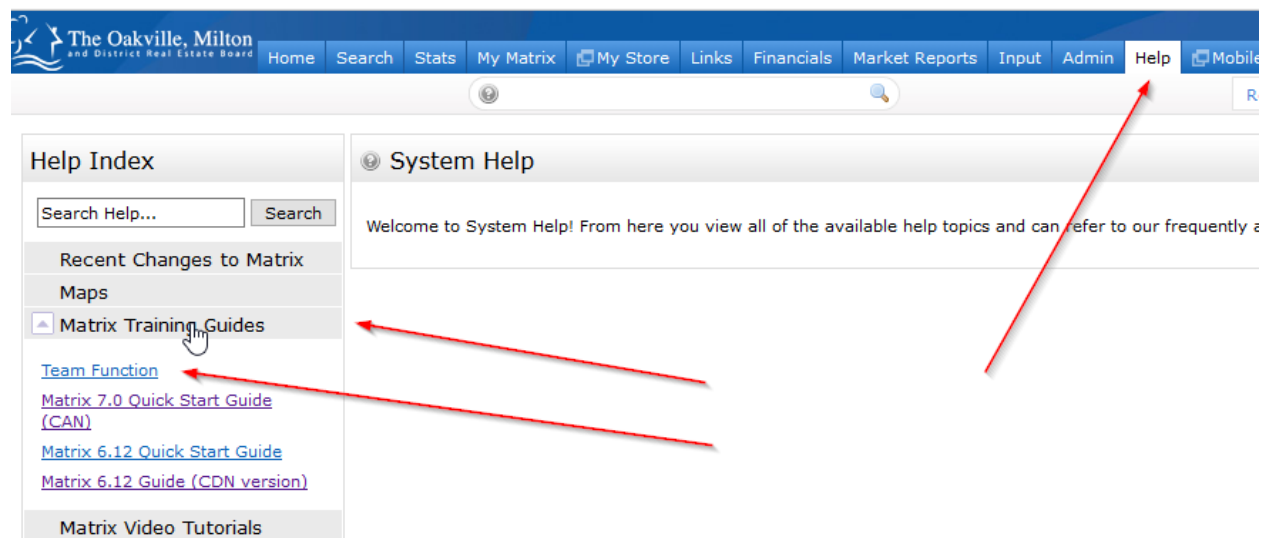


The best place to access the working as link is from the homepage, unfortunately it doesn't work in all tabs such as the settings tab.

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.

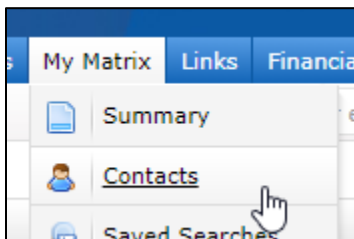
Help on teams and other functionality in Matrix can always be found in the help menu tab under Matrix™ Training Guides.



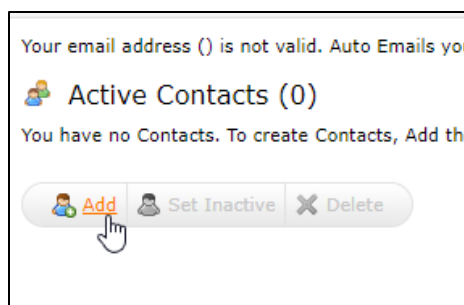
## Managing Contacts

### How do I add a contact?

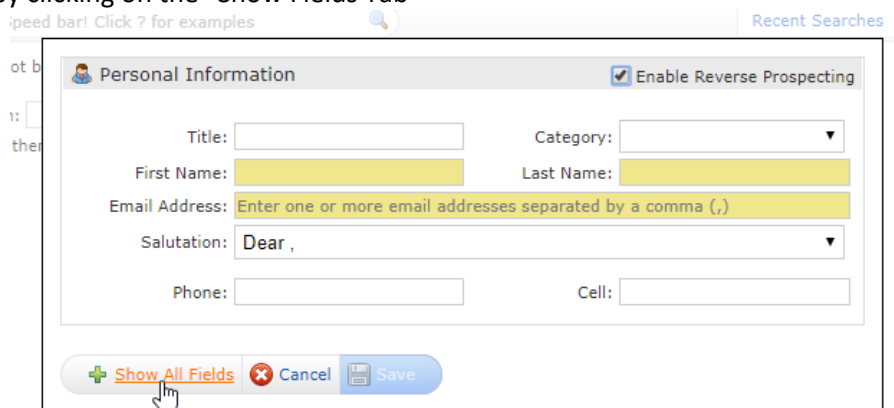
1. Select Contact under my Matrix™



2. Select Add

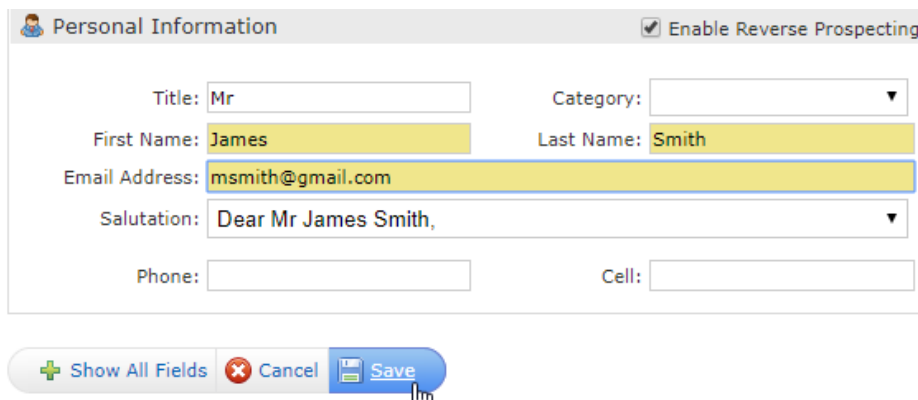


3. Input information around the client as you wish to have for your records, you can add specific details by clicking on the "Show Fields Tab"



A screenshot of the 'Personal Information' form. The form includes fields for Title, Category, First Name, Last Name, Email Address, Salutation, Phone, and Cell. The 'Email Address' field has a placeholder text: 'Enter one or more email addresses separated by a comma (,)'. The 'Show All Fields' button is highlighted with a mouse cursor. The 'Enable Reverse Prospecting' checkbox is checked.

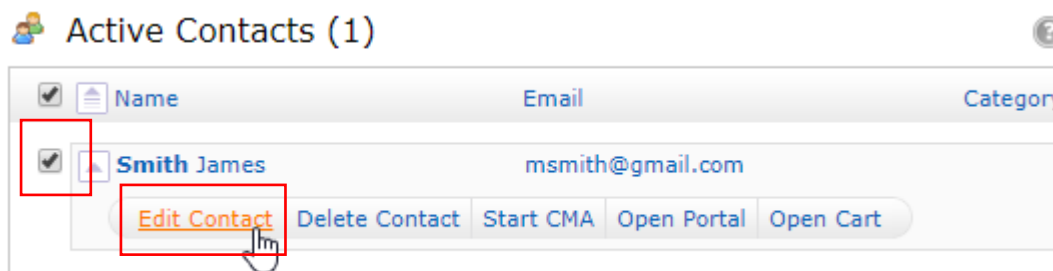
4. Once completed, you can select "Save"



5. [Please click here for a - Video Tutorial for Contacts and Management in Matrix™](#)

### How do I edit a contact?

- When a contact is input, you can edit the contact by:
  - a. Go to My Matrix™
  - b. Select Contacts
  - c. Select the member you wish to edit information for
    - i. Select edit contact



- [Please click here for a - Video Tutorial for Contacts and Management in Matrix™](#)

### How do I create an auto-email?

[Please click here for a - Video Tutorial for how to create Auto Emails in Matrix™](#)

### What is a Client Portal?

[Please click here for a – Video Tutorial about the Client Portal in Matrix™](#)

## How do I find Statistics in Matrix™?

[Please click here for a – Video Tutorial about the Stats Generator in Matrix™](#)

## Where do I find Hot Sheets, and how do I use them?

[Please click here for a – Video Tutorial about Matrix™ Hot Sheets.](#)

## How are Days on Market (DOM) Calculated?

On market status will increment the value of DOM, while off market status will not add to total DOM.

## What is the Status of the Prospects Mobile App?

Prospects will be made available with a data feed provided through Matrix™. This is a service to be available as of the fall of the year 2017. Please monitor your notice channels from BDAR for further updates.

## What are the Benefits & Services Returning Through Matrix™?

- ✓ Access for teams & assistants
- ✓ Easier authentication & log-in
- ✓ Minimal system downtime
- ✓ Higher standard of data integrity with the return of detailed fields
- ✓ Data error button
- ✓ Data integrity checks
- ✓ Improved auto-fill through:
  - WEBForms™
  - GeoWarehouse
- ✓ Simplified open house process
- ✓ Showing Time
  - Online Appointment
    - Service coming in the fall of 2017
- ✓ Strong mobile use
- ✓ SSO (Single Sign On) landing page
- ✓ Strong & reliable data from a Regional System
  - With data & knowledge across 10 Associations
- ✓ Reverse Prospecting
  - Hit Counter
- ✓ Return of:
  - Prospects Mobile App
  - County of Simcoe Interactive Mapping & City of Barrie
  - Auto Emails

- Client Portal (Improved)
- Property Panorama

## Additional Help

Where Can I find a Matrix™ Quick Start Guide & Resources?

- [A Matrix™ Quick Guide Booklet can be found Here](#)
- [An introductory video for how to use & navigate Matrix™ can be found Here](#)
- [Additional BDAR generated resources for Matrix™ can be found Here](#)