Welcome to NorthstarMLS Matrix!

We know changing to a new system is never easy. To make the transition smoother, we have put together information on various features within Matrix. Some sections have "To-Do's" to get you set up with settings and other items. Also, we've listed the data changes that occurred with the conversion.

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Conversion Timeline

We are scheduled to do the final cutover of your data from your current FlexMLS system to NorthstarMLS Matrix on **Tuesday night, November 27**.

We are not able to offer a parallel period because of listing input issues and keeping the two systems in sync. However, we will make a NorthstarMLS Add/Edit test site available to you **by the week of Monday, November 12** (possibly earlier the previous week). This will allow you to check out how Matrix works, but most importantly, you will be able to view your "test" converted listings and give NorthstarMLS feedback on any issues or errors. This will allow us to correct them before going live on Production.

Additionally, we will make the live Matrix Production system available to you **the week of November 12**. Your listings will not be there until November 28, but you will be able to use this time to set-up all your personal information (such as email signature, client portal notification preferences, etc.), check our import of your Contacts and Saved Searches and make any needed changes.

After the conversion is completed the night of November 27, your current FlexMLS system will be "read-only." No listings may be entered or changed in the system, but it will still be available for you to reference in this "read-only" mode through **Friday, November 30**. After that date, FlexMLS will not be available, so be sure to copy/download everything you need that is stored there before the end of Friday the 30th.

What will convert and what will not? Below is a list of items that will and will not convert from Flex to Matrix. Each are discussed further in this document to help you transition.

Will Convert	Will Not Convert
Listing Data (**NOTE:** If a property was identically listed in both NorthstarMLS and SEMR FlexMLS, the NorthstarMLS listing will be kept, and the Flex listing not converted. All Sold data may not be available on the conversion date but will follow shortly after.) Your listings will be assigned new MLS numbers in NorthstarMLS, but your SEMR FlexMLS MLS numbers will also display on the Property Detail and be searchable in both Matrix and Add/Edit.	Your FlexMLS MLS User ID. On NorthstarMLS, your user ID is your NRDS ID number from the National Association of Realtors. If you do not know your NRDS number, check your NAR membership card, the mailing label of your REALTOR magazine, look it up online, or contact the Southeast Minnesota Realtors office.
Open House Data	CMAs
Media – Listing Photos and Supplements/Documents	Custom Grids and Custom Reports
Listing History – Status and Price changes only	IDX Setup

Agent Data (Membership System data)	Vanity Domain Setup
Office Data (Membership System data)	Personal Information for Reports/Websites
Contacts	Email Signature
Saved Searches (as best we can—will be important for you to review them after they are converted)	Incomplete Listings

Even though some items are being converted, there may be some changes that you will need to make to your settings in Matrix. Below are "To Do's" for you to set up Matrix and make your transition easier.

If an item is not being converted, it does not necessarily mean the feature is not available in Matrix. For the non-converted items, you will need to either configure the items in Matrix or export information from Flex as you deem necessary.

As stated above, below is information about various features in Matrix.   It goes over the items mentioned above as well as other features.   Read through it so you are aware of how things work and what you need to do to make the transition as smooth as possible.

Browser Compatibility

Matrix is compatible with the latest browser versions supported by mainstream operating systems, on both PC and Mac. Retired operating systems and browsers, such as Windows XP and Internet Explorer 8 (IE8), are not supported. Anyone using a previous version of these browsers will be presented with a warning at login to encourage upgrading.

Matrix Desktop

Anyone using a desktop and choosing to use Internet Explorer (IE) on Windows Vista can upgrade as far as IE9.   Windows 7 and Windows 8 can upgrade to IE11. Firefox and Chrome automatically update to their most recent versions regardless of underlying operating system. Matrix Desktop supports the following browsers:

- Internet Explorer 10, 11, Edge
- And the most recent versions of:
  - Safari
  - Chrome
  - Firefox
  - Android Browser
  - Chrome Mobile
  - Safari Mobile

Matrix Mobile

Matrix Mobile supports the following browsers:

- IOS Safari

- IOS Chrome
- Android Browser
- Android Chrome

If accessing via a smartphone, Matrix automatically takes you to the mobile version as it auto-detects the device you are using. Note that we also have Homesnap and Homespotter mobile apps available for those who prefer more of a true app experience with all their features.

Contacts

Your Contacts will be converted to Matrix by **Monday, November 12**.   If you do not edit them in Matrix, they will be updated from FlexMLS again at the final conversion on November 27. But if you edit the Contact in Matrix after November 12, that particular Contact will not be updated again.   It will be assumed that the data in Matrix is up-to-date and should not be overwritten by what is in Flex.

Contacts must have an email address to be converted.   Emails are the unique identifier for contacts in Matrix.   Below are some sample conversion scenarios.

1. **Mary Smith, mary@yahoo.com**
2. **Mary Smith, mary@gmail.com**
3. **M Smith, home phone 507-555-1212, mary@yahoo.com**
4. **M Smith, home phone 507-555-1212**
5. **Mary Smith, home phone 507-555-9999**
6. **Bob Smith, mary@yahoo.com, cell phone 507-555-2323**

Based upon the above, you will have the following Contacts in Matrix

1. Mary Smith, mary@yahoo.com, home phone, 507-555-1212, cell phone 507-555-2323
   a. The conversion process will merge records 1, 3 and 4. Record 6 will also merge due to the email address match.
2. Mary Smith, mary@gmail.com

Record 5 will not convert due to an email address not existing.

Contacts must have a first and last name. If either the first or last name is missing, the email address will be placed in the missing field.   Before the final November 27 conversion, verify the contacts that exist in Flex and enter any that you may need moving forward into Matrix. Remember, you will need a unique email address for each person entered.

To Do: Review Contacts - make sure all your Contact information converted correctly.   Edit your Contacts as needed to add additional information that may be in Matrix that was not in Flex.

- Click on **My Matrix, Contacts** to view your Contacts
- Click on the **arrow** to the left of their name to get the editing options.
- Click on **Edit Contact** if you need to update someone.

- A pop-up will appear with a few pieces of information. If you need to see more information, click on **Show All Fields** to see all the pieces of information about your Contact.
- Click on **Save** when finished.

You can also Add a Contact or Delete a Contact once you are in the Contacts section.

The Contacts, Auto-Email and Portal features of Matrix are integrated with each other. Make sure you read the sections on Auto-Email and Portal to understand more about how they work together.

Saved Searches

Your Saved Searches will be converted; however, it is important you check their accuracy in Matrix and edit as needed. We have mapped the data fields from FlexMLS to Matrix as best we can. But there are some fields that are not being converted and others that could potentially have issues translating.

Because of the importance of having you check the accuracy of your converted saved searches, we are not setting any of them to automatically update and email to your clients. If you have any saved searches on FlexMLS that are set up to automatically email new listings to your clients, you will need to re-enable them in Matrix after you have checked them and made any needed changes. **Please see the Auto-Emails section of this document for more information and instructions**.

To Do: Check Your Saved Searches - Check your converted Saved Searches and connect each to its Contact record.   A Saved Search does not have to be connected to a Contact, but it's obviously helpful in many situations.

- Click on **My Matrix, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the **arrow** in the Contact box to select the appropriate Contact.
- Click on **Save**.

To Do: Set up My Favorite Searches – My Favorite Searches appears on the Home page of Matrix. You can enable up to 10 searches to appear on the Home page.

- Click on **My Matrix, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- **Check the box** to Enable as Favorite Search on Home tab.
- Click on **Save**.

Saved Speed Bar Searches

This is a unique feature in Matrix that was not available in Flex. You do not need to look at this when first setting things up, but you may need to look at it in the future. Speed Bar Search is discussed elsewhere in this document.

NOTE: There is no limit to the number of Saved Searches or Speed Bar Searches allowed.

Date Since in Saved Searches

Another unique feature with Matrix is the ability to execute a "date since" search on a saved search. This is similar to the hotsheet feature to see what has occurred since the last time you executed the search.   To use this feature, click on the saved search under My Matrix and used the Date Since button shown below.
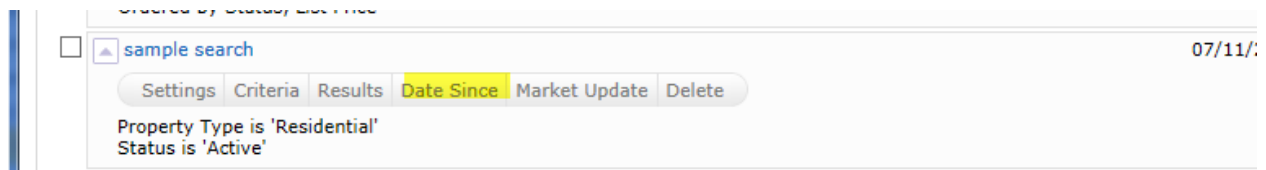
Personal/Marketing Information

The information from your membership system will be in the listings in the system. The settings below will not change how information will appear in a listing. Contact your Association if you need to change your information as it appears in your listings.

Some features in this document will use personal information that is in the system for marketing purposes.   For instance, it personalizes your headers or footers on reports.   This personal information is not part of your Association's membership system.

Before you start using Matrix, enter all of your personal information first. This will make it so other features will properly work when you turn them on.

To Do: Email Signature – Set this up so you can turn on Auto-Emails and use other email functions.

- Click on **My Matrix, My Information, Email Signature.**
- Edit how you want your signature to appear and click on **Save.**

You can only insert photos for your signature that are used with your Print Header, CMA Cover Page or Portal Greeting.

To Do: Information – This section contains information used on the Client Portal, in headers and footers as well as other areas of Matrix.   You can override what is in your membership system for first name, last name and email address. However, it is highly recommended to contact your MLS to change your membership information at the source for those pieces of information.

- Click on **My Matrix, My Information, Information.**
- Edit the various pieces of information and click on **Save.**

To Do: Header & Footer – This is the header and footer that can appear when printing Reports as well as on the Portal.

- Click on **My Matrix, My Information, Header & Footer.**
- If you want to use one of the templates provided, Click on the **selection bubble** to the left of the one desired.
- Click on **Preview.**
- Choose **Select a Different Package** if you want to change the template.
- Upload a Photo of yourself, if desired.
- Click on **Save.**
- **OPTIONAL -** If you want to create a Custom Header/Footer
  - Click on the **selection bubble** to the left of Upload Custom Header/Footer**.**
  - Click on **Upload Images.**
  - Upload images, choose sizing and coloring as desired.
  - Click on **Save.**

Note: For best results, the optimum image size for an agent photo is 66 x 79 pixels and the header/footer banner is 1200 x 85.

To Do: Portal Information – This is used with your Portal. The information available includes the items you edited above on the **Information** page.   If you do not see many items to choose from, you may need to first edit them on the **Information** page.

- Click on **My Matrix, My Information, Portal Information.**
- Modify information as needed.
- Click on **Save.**

Note: For best results, the optimum image size for a portal photo is 100 x 100

To Do: Portal Notification Settings – You can choose to receive notifications (by email and/or text messaging) for various interactions your client does in their Portal, such as visiting their Portal, or saving a listing as a Favorite. Minimally, we recommend setting yourself up to receive notifications whenever a client **Adds Notes** through the Portal so that you can respond promptly.

- Click on **My Matrix, Settings, Portal Notification Settings.**
- Click to mark the checkboxes for the types of notification you want to receive, and delivery method (Email and/or Text).
- If you select Text for any notifications, fill in your Mobile Phone Number and Cellular Provider (click the link "click here to edit your cellular information" link). After entering your information, click the button to send yourself a Verification Code.
- Click on **Save.**

To Do: Mobile Header – This is a slightly different header used for your Mobile Portal, since not as much information can fit.

- Click on **My Matrix, My Information, Mobile Header.**

- Modify information as needed. It gives the option to add a different photo due to the size of the mobile header vs. a regular header.
- Click on **Save.**

Note: For best results, the optimum image size for a mobile photo is 60 x 60

To Do: CMA Cover Sheet – This is used with your CMA and allows you to enter extra contact information just for a CMA. The photo for the CMA Cover Sheet can be a picture of a house or something real estate related. It is not intended for it to be a photo of you, but it can be if desired.

- Click on **My Matrix, My Information, CMA Cover Sheet.**
- Modify information as needed.
- Click on **Save.**

Note: For best results, the optimum image size for a portal photo is 80 x 120

Auto-Emails

Since emails are already being sent from Flex, Auto-Emails are not being sent from Matrix until you activate them.   Your Auto-Emails have been imported as Saved Searches but need to be manually activated.

 Any search that was used for an auto-email will have a plus sign at the beginning of the name (**+Imported Bob's 3 BR Condos**).   If there is no plus sign in front of the search, then it was just a saved search.

With conversions, every effort is made to convert the saved searches complete. However, fields change or are removed and it's not possible to convert 100% of a saved search.   If this is the case, an asterisk (*) will follow the name of the search **(+Imported Bob's 3 BR Condos*)**. The asterisk means your saved search is incomplete.   Open the saved search in the old system and the new system and check the criteria to find the difference.   Edit the criteria in Matrix as needed to make it fit your client's needs.

Also, criteria with saved searches may not be on the search screen by default. If this is the case, any field in a saved search will appear below the main search screen under Additional Fields – Add/Remove.

If you need help with your Saved Searches, please see the Searching section, further below in this document, for tips.

It is recommended for you to do the following before enabling any auto-emails:

- Read through the **Portal Quick Start Guide** (hyperlink below). This document is for your customer, but make sure you are familiar with it. This will allow you to understand how the Portal experience works for your customers and answer any questions they may have. https://media.northstarmls.com/Matrix/PDFs/Matrix/portal_7_0_Consumerpdf.pdf

- Tell your customers the MLS system is changing so they will be aware of the change in the look and feel of the information they will see and receive. Tell them to whitelist/allow emails from all three of the new domains of the Matrix system:
  - matrixemailer.com
  - mlsmatrix.com
  - mlxmatrix.com
- Include the link to the **Portal Quick Start Guide** above. This will help them understand the changes.
- Personalize your Portal Information. Build it out so your customers have a pleasant experience and it has your personal branding on it. Our Portal Set-Up Guide shows you how. https://media.northstarmls.com/Matrix/PDFs/Matrix/7-0_PortalsetUp.pdf
- Configure your Header/Footer options. The Header appears on your Portal and provides you to brand the Portal site.
- Configure your Email Signature. This will enable your customers to see the information is coming from you along with your contact information.
- Customize your Welcome Letter that is sent when auto-emails are activated.

When you turn on an Auto-Email in Matrix, you should turn it off in the FlexMLS system so your customer does not receive two emails from you. This will reduce confusion as to which email they should be reading. Though you will have access to Auto-Emails in Matrix starting November 12, we recommend that you wait and activate them after the November 27 conversion when all of SEMR's listings are converted over.

To Do: Enable Auto-Emails – Follow the steps below to set up auto-email for your customers and clients.

- Make sure you have reviewed your **Contacts** as indicated previously.
- Make sure you have reviewed your **Saved Searches** as indicated previously.
- Make sure you have set up your **Email Signature** as indicated previously.
- Click on **My Matrix, Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the link at the top that says **Turn this Saved Search into an Auto Email**
- Edit the information for the Auto-Email.
  - If you choose Daily as the option for sending, there is an AM and a PM option. The AM emails are sent at 8:00 a.m. The PM emails are sent at 6:00 p.m.
- Click on **Save**.

Note: A maximum of 250 records are returned with a search associated with Auto-Emails. Please make sure the Saved Searches that are enabled do not return more than 250 listings.   If the search returns over 250 listings, you will be prompted to edit the Saved Search.

Once an Auto-Email is set up, the email will be sent to your customer. The status of your Auto-Email will be one of the following:

Auto Email is Active, but the Contact has not yet logged in and activated their portal.

Auto Email is Active and has been accessed by the Client.

Auto Email is disabled by client or agent.

A customer can unsubscribe from just one email, from all emails from one agent, or from all emails from the MLS. If your customer is not receiving an email, make sure they did not unsubscribe from your emails or from the MLS emails.

If an auto-email has been set up and it returns zero listings for 90 days, it will be disabled by the system. Also, if an auto-email is not opened by your client, it will be disabled after 30 days.

Portal

The Portal is a feature of Matrix that allows you to interface with your clients and customers. The information your customers see on the Portal is real-time.

Below is a link to a document that you can give to your customers. It explains how to use the Portal from their standpoint.
https://media.northstarmls.com/Matrix/PDFs/Matrix/portal_7_0_Consumerpdf.pdf

It is recommended for you to read through the document too, so you are familiar with how the Portal experience works for your customers.

Instructions on how to edit your Portal Information under My Matrix were provided above. Make sure you complete this section.

A Portal is available for each of your customers. To manage the information for each customer, go to the Contacts section under My Matrix.

- Click on **My Matrix, Contacts** to view your Contacts
- Click on the **arrow** to the left of their name to get the editing options.
- Click on the **Open Portal** option to see what they see.
- While looking at the Contact information, you can see the activity of your customer on the Portal -
    - o Last Portal Visit
    - o Listing Notes
    - o Favorites
    - o Possibilities
    - o Discards

Make sure you check your Contacts section on a regular basis if you are utilizing the Portal feature. This is your dashboard to see what your customer is interested in and how you might alter their auto-emails.

Contacts and Portal are integrated. If you change the status of your Contact to Inactive, it will disable their Portal. Also, if you delete your Contact, the Portal will no longer be available to them.

Saved Searches and Auto-Emails are also integrated with the Portal. Make sure you read the section on Auto-Emails to understand how certain features within the Portal will function. For instance, if an auto-email has been set up and it returns zero listings for 90 days, it will be disabled by the system and drop from the Portal.

The Discarded listings on the Portal are purged after a certain time period. If the listing was part of an auto-email, it will drop after 14 days. If it was part of a direct email from you, it will drop after 90 days.

Market Watch

Market Watch is available on the Home page to provide you a quick look at what changes have occurred with listings in the system. Below is an explanation of the first few Change Types.

- New - Listings that are new to the system (see time frame below).
- Back On Market – Listings that have moved from any other Off-Market status back to Active status.
- Price Decrease – Listings where a decrease in price occurred of 0.5% or greater.
- Price Increase - Listings where an increase in price occurred of 0.5% or greater.

There are three options from the Home page to quickly change your look at the market.

- Property Type – Used to switch between Residential, Commercial, etc.
- Timeframe – Used to switch between Today, 24 hours, 3 days and 7 days. In the past, New was always 7 days. Matrix allows more flexibility associated with the timeframe.
- Customize – Used to narrow the criteria instead of defaulting to all listings.

Hot Sheets

As with Market Watch, Hot Sheets are available from the Home tab of Matrix. Hot Sheets are searches that can use the Change Types in the system to provide quick information on what has happened recently in the market.

By default, there is a Hot Sheet for each Property Type. To edit or add a Hot Sheet follow these steps.

- Click on **My Matrix, Settings, Hot Sheets.**
- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.

Or

- Click on **Customize** under **Hot Sheets** from the **Home** page.

- Under the Manage Hot Sheets option, Add, Edit, Delete and Move the Hot Sheets as needed.

To run a Hot Sheet, follow these steps:

- Choose the **Timeframe** desired –
    - Since Last Search – Since you logged into Matrix
    - New Only – Adds the Change Type of New only
    - 24 Hour – In the last 24 hours
    - Today – During the current day
    - 3 Day – In the past 3 days
    - 7 Day - in the past 7 days
    - Custom – allows you to choose any timeframe
- Click on the **Hot Sheet** desired.

Note: There is a limit of ten (10) Hot Sheets that can be accessed from the Home tab of Matrix.

Searching

There are two ways to Search in Matrix. One is on a Search Screen and the other is with the Speedbar. You can create saved searches for both. Speedbar Saved Searches are for use within Matrix only. Saved Searches from a Search Screen can be attached to a Contact and set up as an Auto-Email, if desired.

Speedbar Search

Speedbar Search is for shortcut searching.   This is where you will search by MLS Number. There is no need to be on a Search Screen to use the Speedbar.   When in Matrix, click on the Help icon next to the Speedbar for tips on how to use it.   Also, help is available from the Help tab under FAQ's.
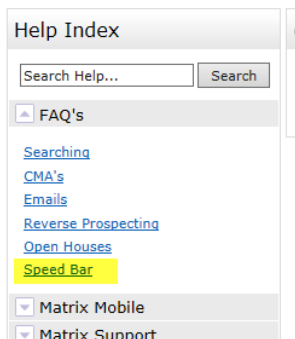
One of the best ways to learn how to use the Speedbar is to watch what Matrix puts in the Speedbar when you do a regular search. The Speedbar will be filled in, even if you didn't use it. For instance, by searching Active, Residential listings in Avon, the Speedbar filled in the following.

Just like regular searches, Speedbar searches can be saved too. These use the slash ("/") to identify them from a non-saved Speedbar search.

Search Screens

Search Screens allow you to search by using all the various criteria in the system. This can include items such as select values for appliances and/or list price.   Use the Search tab to access all the Search Screens created in the system. There are Search Screens for each of the Property Types, Open Houses, Agents and Offices.

Reverse Prospecting

This feature facilitates agents getting in touch with each other for their clients' mutual benefit. Listing Agents more easily find other agents with buyers looking for properties like the ones they represent for sellers. Agents representing potential buyers become more aware of available properties matching their buyers' criteria.

Agents Working with Potential Buyer(s)

To make a saved search available for Reverse Prospecting, click the "Available for Reverse Prospect" checkbox under the Automatic Email settings (*My Matrix>Auto Email*). This will assign a number to the search that will show on your Saved Searches screen. (*It is automatically selected. You must uncheck it to opt-out.*) List Agents with matching properties can now more easily find you.

List Agents

If you have a listing you want to conduct Reverse Prospecting on, go to the "My Listings" screen (*under the My Matrix tab*), select the listing you want to Reverse Prospect, and click the "Reverse Prospect" button. The display will show you a list of agents with saved search criteria that match your listing. If you contact an agent, be sure to give them the numerical ID from the display so they can easily find the matching search/customer.

NOTE: Reverse Prospecting is completely anonymous for your buyers. List agents are not given your customer names or contact information. A numerical ID is used to keep it anonymous.

Retrieving Reverse Prospects

To retrieve your prospects, follow these steps.

- Click on **My Matrix, My Listings**
- Select either '**My Active Listings**' or '**My Hit Counters**' from the "Show" dropdown box
- Check off the desired listing you wish to view Reverse Prospects for.
- Click on the '**Reverse Prospect**' button below the results.
- This will produce a list of all agents who have clients set up on Auto Email which match your property.

Displays vs. Reports

In Matrix, there are Displays and Reports. There is a difference between the two. Below is what distinguishes the two from each other.

<u>Displays</u>

- HTML based information seen after you search in your browser.
- Printable from browser, but with no header.
- PDF version available with option for header to be added.

<u>Reports</u>

- PDF reports that are created with Crystal Reports that allow additional functionality over HTML.
- Different styling is possible and usually creates a more aesthetically pleasing view of the data.
- Aggregate functions available (i.e. Median, Average).
- Headers/Footers are included.

The displays and reports were created with your MLS's help. If you have feedback on what should be on a display or report, please contact your MLS with your suggestion.

Custom Reports

Your Custom Reports in Flex will not be converted to Matrix. Unfortunately, the systems differ too much to make it possible.

There is no option to create full-page reports in Matrix.   It is recommended to use Microsoft Word or other third-party program to create a report or flyer for your listings.

Please see Custom Displays to see what is available for you to create in Matrix.

Custom Displays

Your Custom Reports in Flex will not be converted to Matrix. Unfortunately, the systems differ too much to make it possible.

In Matrix, you can create a single-line grid Custom Display by using the following steps.

- Run a Search. The Agent Single-Line Summary is the default display.
- Click on the grey area of any column header where you want to insert a column with the data field of your choice. A pop-up window will appear. Click the "Insert Column" link and then select whichever field in the MLS you want from the list. Click the Apply button, and your new column is inserted. Use that same pop-up window to adjust column width, alignment, wrapping or to remove a column (you can remove any columns from the default single line grid you don't want).
- Repeat the above step for as many fields as you want to add.

- On the header bar (just below the Results tab), click the piece of paper with pencil icon. Type in a name for your new custom display grid.
- Click **Save as a Copy.**
- Your new display grid is now available at the top of your displays list with the word "my:" in front of it.
- To manage all your Custom Display grids, go to **My Matrix, Settings, Custom Displays**.
- A list of Custom Displays will be shown.
- Click on **Edit** and you can add or remove items as needed.

There is no option to create full-page reports in Matrix.   It is recommended to use Microsoft Word or other third-party program to create a report or flyer for your listings.

Setting a Default Display

When searching, the default display is the single-line summary.   To change this to a different system display or one that you customized under Custom Displays, use the following steps.

- Run a Search.   The single-line summary will be the default display.
- Choose the display desired, such as Agent Thumbnail, from the Display selection menu at the top of the single-line display.
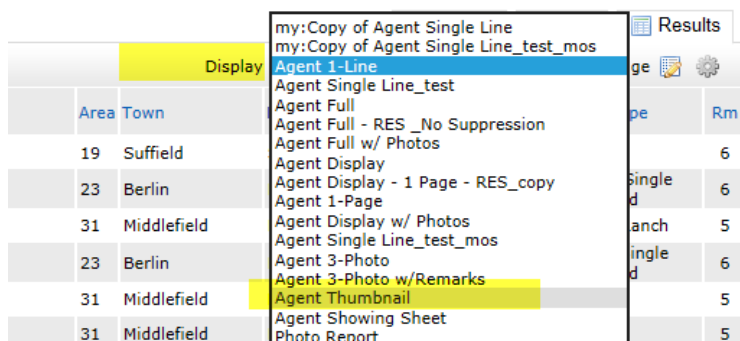
- Select the **set default wheel** located to the right of the Display options. Choose the **Set Current Display** option.
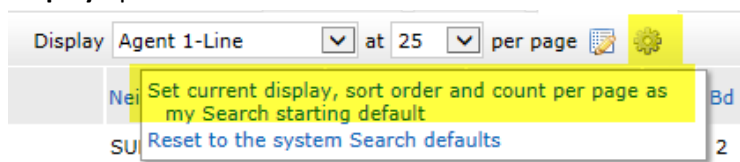
- To return to the single-line display as your default, choose the Reset option instead.

CMAs

CMAs from your old system will not be converted to Matrix. Unfortunately, the way they are stored in the system makes this not possible.   If you have CMA's you need from Flex, we recommend you save each CMA as a PDF on your computer. Or, you can recreate the CMA with Matrix.

There is no limit to the number of CMA's you can have. CMA's with over 180 days of inactivity are purged from the system. Previously, this limit was 120 days.

To create a CMA, follow these steps:

- Click on **My Matrix, My CMA's**
- Click on **Start a CMA**
- You will be walked through the CMA Wizard.   This will include the following items:
    - **Start** - Select a CMA Contact
    - **Pages** - Select the Pages for the CMA
    - **Subject** - Select a Subject Property
    - **Cover** - Edit the Cover Information
    - **Comparables** – Search for and add Comparables
    - **Map** - Review Map information
    - **Adjustments** - Make Adjustments to the comparables based upon the attributes of the listings.
    - **Pricing** - Review the Pricing section. Add in your **Suggested List Price** and **Notes**.
    - **View, Save, Print and/or Email** the CMA as needed throughout the process.

At times, some items in the Wizard may not be available. Certain Pages need to be selected for options to be available. For instance, if you have not chosen a Cover Page to print, the Cover option will not be available.

Teams

NorthstarMLS allows you to create and manage a formal team or allow someone to work with you occasionally for vacation coverage. Agents (or their assistants) may work on behalf of another agent. It is also possible to impersonate another agent.

Note: NorthstarMLS will only allow you to add someone to your team who has an Active NorthstarMLS ID on the system.

Impersonate Another Agent

- If an agent you work with added you to her team in Matrix and set you up to impersonate her, you would be able to do the following things:
  Emails sent from Matrix would be sent from her name and email address, and would use her email banner and footer (if she had chosen one) and email signature.
- Print reports – any reports that are printed while impersonating another 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 are impersonating.
- Access another agent's Matrix Contacts, Saved Searches (you cannot change her team settings)
  When you send an email from Matrix while you are impersonating another 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 Another Agent

If an agent you work with added you to his team in Add/Edit and set you up to work on behalf of him, you would be able to do the following things while working on behalf of him in Matrix:

- Emails sent from Matrix would be sent from your name and email address on his 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 his Matrix Contacts, Saved Searches (you cannot change his team settings)

Adding Other Agents as Your Team Members

Each NorthstarMLS user that is added to your team will have full access to your Matrix account and can either "impersonate" you or "work on your behalf," depending on the type of access you grant them.

How to Set Up a Team

Below are the steps on how to set up a team in the NorthstarMLS Add/Edit system.

- Click on the Add/Edit tab. Click on **TEAMS** on the top menu bar.
- To create a Team, click on the large blue circle with the plus sign on the right side of the screen.
- Click **Click here to create a Team** again on the next screen.
- Fill in all the information on your team (Name, Description, Type.)
- In the Team Members section, click the blue circle with plus sign icon at the right to add Team Members.
- Start typing an agent's name in the Team Member Name box until the agent appears in the list for you to select.
- Select whether you want this colleague to **Impersonate** you or **Work on Behalf** of you, and whether you want to allow them to edit Team listings in the Add/Edit system.
- Click the **Save** Button (upper right corner of screen).
- When finished adding Team members, click the **Save** button again to save your Team.

From the main Teams screen you can:

- Edit the Team
  - o Add additional team members.
  - o Delete team members
  - o Edit team member's status (impersonate or work on behalf).
  - o Change your Team name.
  - o Set yourself up to either impersonate or work on behalf of the team.
  - o Allow team members the option of switching between their own names and the Team name when printing and emailing to Team Contacts.
- Disable or Delete a Team

- Add a new Team (you may have only one Team enabled at a time)
- View other Teams on which you are a member

When one of your team members logs in to Matrix, 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 he 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 clicking on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to 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.

Add/Edit

If your broker has assigned listing add/edit privileges to you, then you may add and edit listings along with Photos, Supplements, Virtual Tours and Open Houses. The extent to which you can do this is determined by the privileges assigned by your broker and applies to listings where you are the List or Co-List agent. Office Managers are usually assigned Office Broker status to allow them to manage all listings for all agents in one or more offices. The NorthstarMLS Add/Edit system is an in-house developed system that is separate from Matrix, but closely linked. New listings and listing changes made in Add/Edit usually reflect in Matrix within 10 minutes. Add/Edit may be accessed through the Add/Edit tab in Matrix, or from its own button on the home page of our website, NorthstarMLS.com.

Photos

When adding a listing in Add/Edit, the default Status is Incomplete. The incomplete status listings cannot be seen in Matrix when searching, only in Add/Edit.   This status allows you to be able to add photos prior to submitting the listing to the system as Active Status or Withheld.

Previously, there was a limit of 24 photos per listing. It is now unlimited.

When entering a Photo with Add/Edit, you can enter a Caption. This can be a title, such as "Kitchen", or a description about the photo, such as "View from back deck overlooking Lake Smith"

Supplements/Documents

Documents are called Supplements in Matrix, as they do not need to be an actual document. All of your documents from Flex converted into Matrix along with your listings.

Supplements can be any file type (.DOC, .PDF, etc.). However, it is recommended you upload documents in a PDF format.   This makes the document read-only and does not allow anyone else to edit your document.

Supplements in Matrix can have a file size of 10 MB. There is no limit to the number of supplements per listing. When uploading a supplement, you will designate it as viewable by Agents Only (only visible within Matrix) or All (visible to the consumer).

Data Changes

NorthstarMLS has worked closely with SEMR to identify data differences between the two MLS's and make changes to the NorthstarMLS database to accommodate the most important ones. The following are the highlights that you will most likely notice.

New Fields

NorthstarMLS has added many new fields to match important fields in the SEMR MLS that we did not have. These include:

- Total square footage fields for above ground, main floor, below ground and total (NorthstarMLS had only *finished* square footages)
- Rental License Yes/No and Rental License Type (new field for SEMR too)
- LockBox Source, Type and Serial #
- Rochester Schools
- Section, Township and Range numbers
- Electrical Service (Circuit Breakers/Fuses, and number of AMPS)
- Multi-Family Unit Leased (Yes/No) and Lease Expiration Dates
- Commercial Leases (NorthstarMLS previously only allowed properties for sale)
- Commercial Unit Details
- Outbuilding Details
- Many new Farm fields, most of them also new to SEMR

Additionally, we added many new options to existing fields to match SEMR, such as more Amenities, Appliances, Lot Descriptions, Outbuildings, Utilities, and more.

Important Changes

There are some fields that you will find different in NorthstarMLS:

- **Style:** SEMR's Style and Number of Stories/Levels fields will be combined into NorthstarMLS's single Style field. This is only temporary, as NorthstarMLS plans to convert to separate Style and Stories/Levels fields first quarter of 2019.
- **Room Remarks:** NorthstarMLS does not have Room Remarks, however you may describe rooms along with their pictures using photo captions.

- **Owner Name:** NorthstarMLS does not have the owner name in the MLS listing record. However, you may click the PID number on any listing to view the Realist public tax record which does contain the owner name.
- **Complex/Development/Subdivision Name:** In NorthstarMLS, this is strictly a free-form text field. We do not maintain any select lists of names as SEMR did for Rochester.
- **Occupied By:** NorthstarMLS does not have a field to indicate whether the listing is vacant or occupied by the owner or renter. You may choose to disclose this in ShowingTime.
- **Bonus:** NorthstarMLS does not have a field to indicate whether a Bonus is offered. You may place this in Agent Remarks, but per NAR policy, they must be unconditional.