

Matrix

Prospect and Client Management



For Support: (800) 925-1525

Support Hours:
M-F 8:30 AM – 9:00 PM
Sat-Sun: 10:00 AM – 3:00 PM
www.crmls.org/support

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Managing Contacts

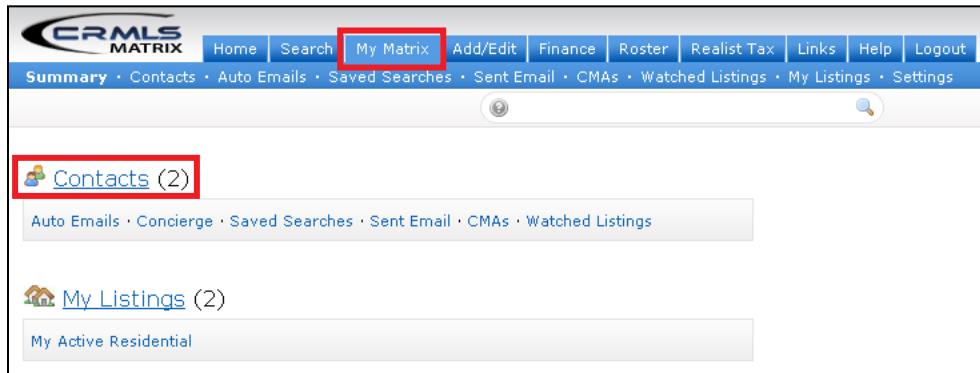
Follow the steps in these sections to add and manage contacts in the CRMLS Matrix Platform:

- “Adding Contacts” below
- “Viewing Contacts” on page 6
- “Managing Contacts” on page 8

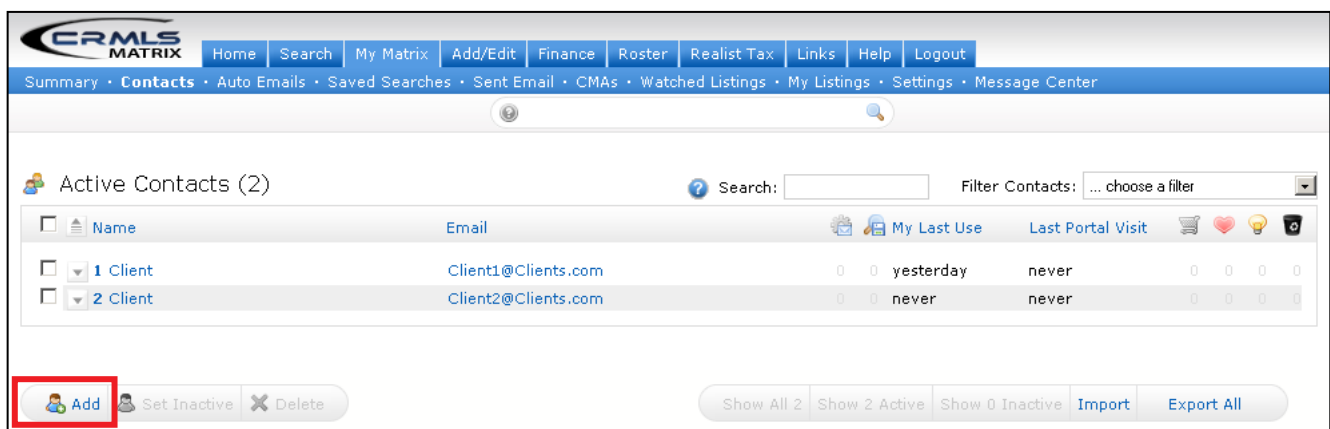
Adding Contacts

Follow the steps below to add contacts to the CRMLS Matrix Platform.

1. Click the **Contacts** link on the **My Matrix** tab.



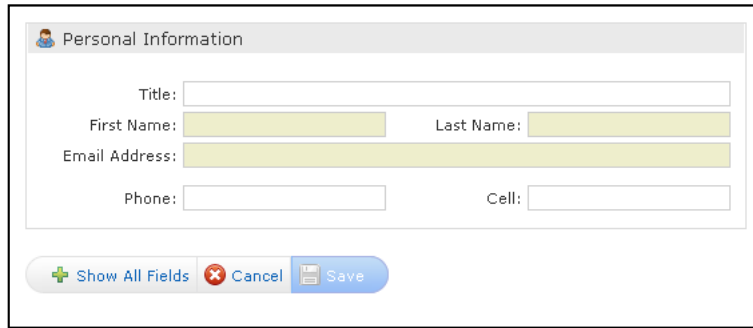
2. Click **Add** to add a new contact.



Note:

To add multiple contacts at once, see “Importing Multiple Contacts” on page 4.

3. Enter your client's contact information in the available fields. Required fields are highlighted in yellow.



Personal Information

Title:

First Name: Last Name:

Email Address:

Phone: Cell:

[+ Show All Fields](#) [✖ Cancel](#) [Save](#)

Note:

To add a contact's home address, business address, or to add notes about the contact, click **Show All Fields**.

4. Click **Save** to save your client's contact information.

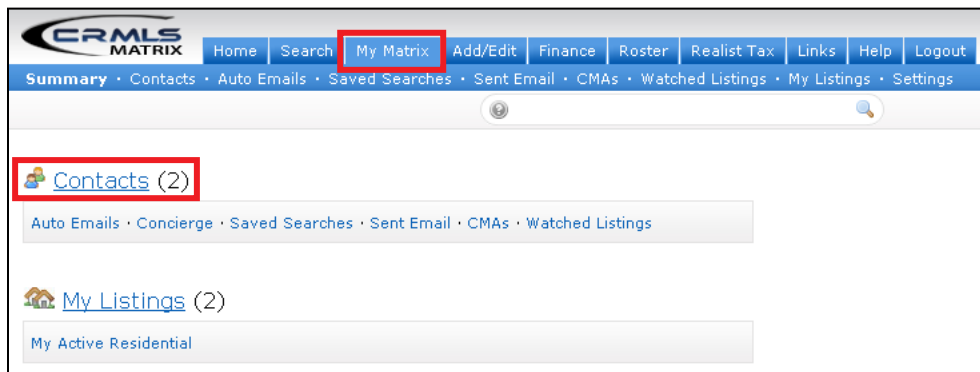
Importing Multiple Contacts

Before you begin, make sure that you've exported your contacts from Microsoft Outlook in Comma Separated Values (Windows) format. Then follow the steps below to import your contacts.

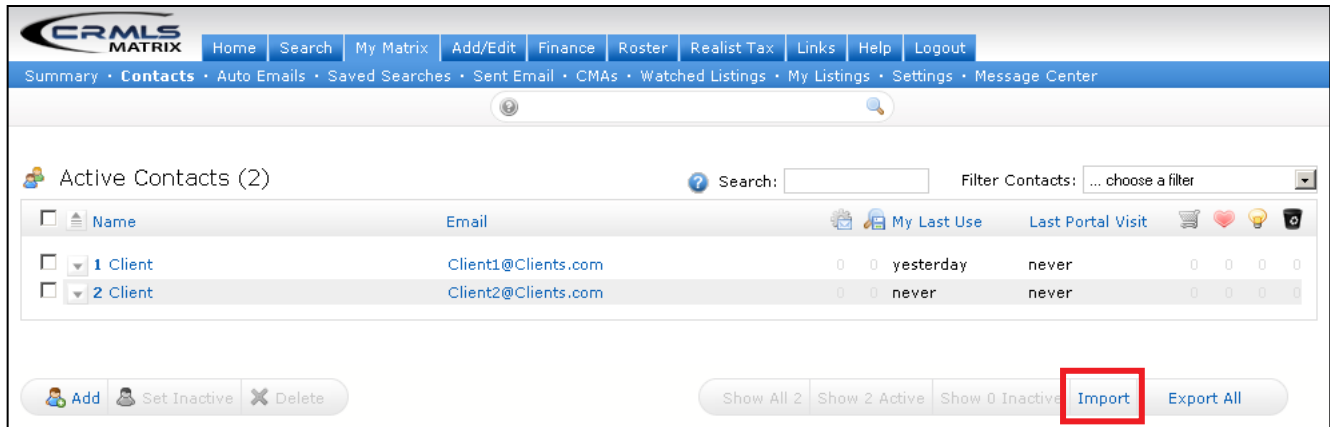
Note:

Contacts that do not contain a first name, last name, or email address will not be imported.

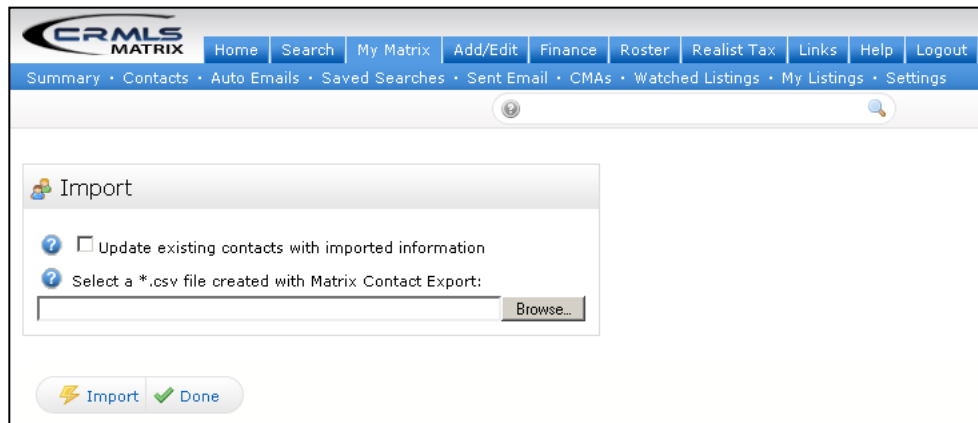
1. Click the **Contacts** link on the **My Matrix** tab.



2. Click **Import**.



3. Click **Browse** to locate the CSV file that you exported from Microsoft Outlook.



Note:

To update existing contacts with the information in your CSV file, click the **Update existing contacts with imported information** checkbox.

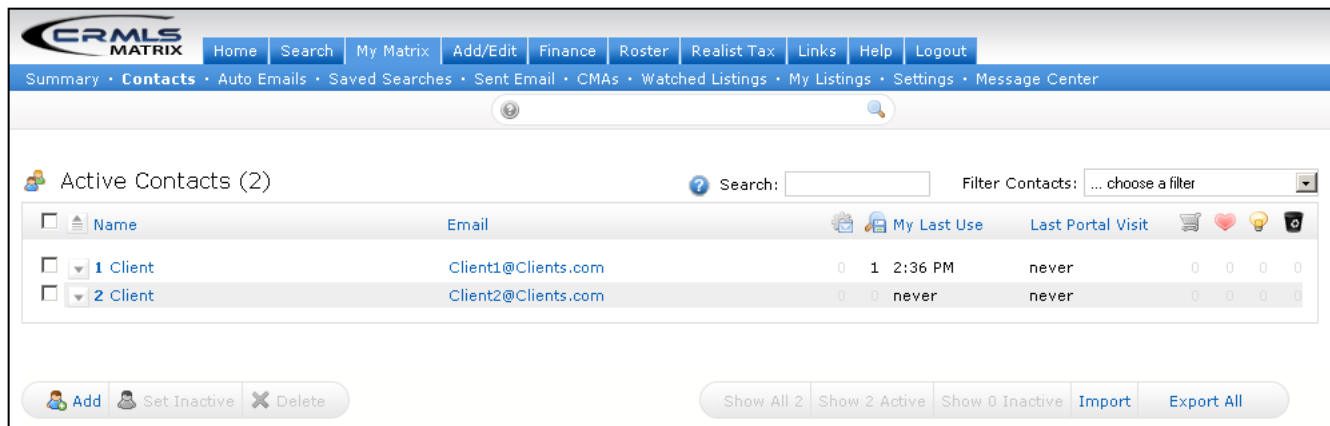
4. Click **Import** to import your contacts.

5. When the import is complete, you see the results of the import. Click **Done** to return to the Contacts page.

Viewing Contacts

To view your contacts, click the **Contacts** link on the **My Matrix** tab.

To view a contact's details, click the triangle next to the contact's name.









To sort your contacts alphabetically, click the **Name** link.

To search for a contact, type a name in the **Search** field.

To narrow down your contacts, select one of the following options in the **Filter Contacts** drop-down menu:

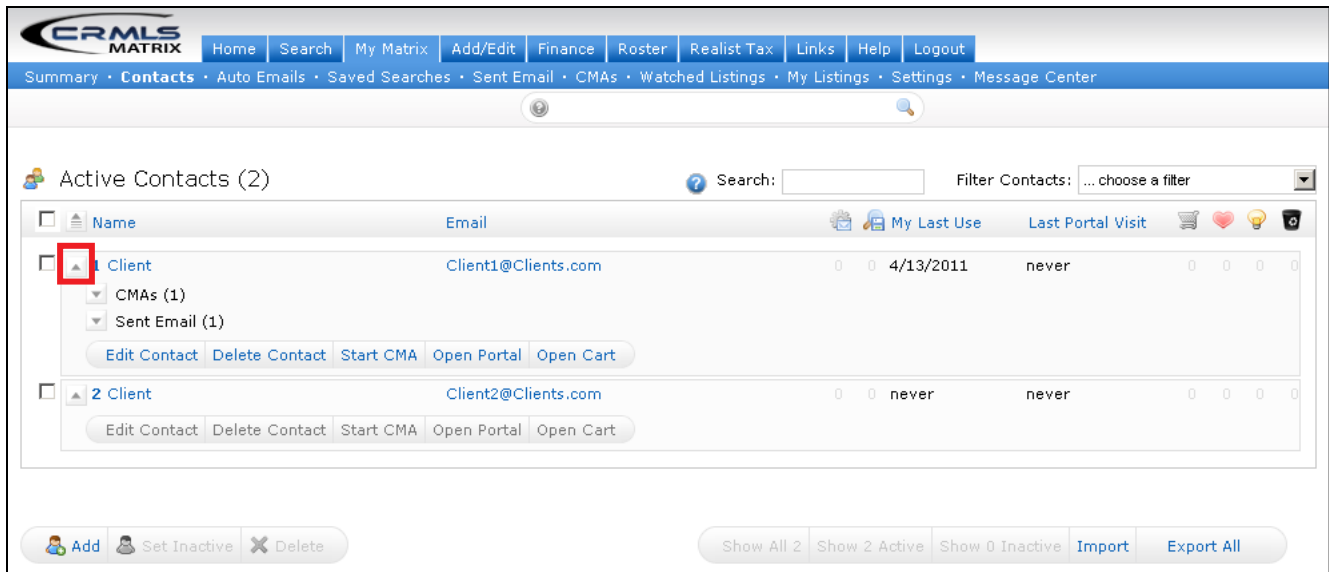
- **with active auto emails** displays all contacts with active auto emails
- **with inactive auto emails** displays all contacts with inactive auto emails
- **with no auto emails** displays all contacts that do not have an auto email
- **who have visited their portal** displays all contacts that have visited their client portal
- **who have not visited their portal** displays all contacts that have not visited their client portal
- **I haven't worked with** displays all contacts that you haven't worked with for a specific amount of time
- **who have saved searches** displays all contacts that have a saved search assigned to them
- **who have no saved searches** displays all contacts that do not have a saved search assigned to them

For a list of contact icons and their descriptions, refer to the table below:

Icon	Description
	Displays which contacts have active Auto Email.
	Displays which contacts have Saved Searches.
My Last Use	Displays the date that you last worked with a client in the CRMLS Matrix Platform.
Last Portal Visit	Displays the date that your Contact opened their Auto Email or direct email.
	Displays the number of listings in the client's cart.
	Displays the number of Favorites your client has selected.
	Displays the number of listings your client selected as Possibilities.
	Displays the number of listings that were Discarded by your client.

Managing Contacts

From the Contacts page, click the triangle next to a contact to view items assigned to your contact.



Now you can do the following:

- Click the **Edit Contact** button to update the selected contact's information.

Note:

To update the contact's home address, business address, or notes about the contact, click the **Show All Fields** button in the Personal Information window.

- Click the triangle next to Auto Emails to view and edit auto-email settings for your client. (See "Managing Auto Emails" on page 28 for details.)
- Click the triangle next to Saved Searches to view and edit previously saved searches. (See "Managing Saved Searches" on page 19 for details.)
- Click the triangle next to CMAs to view, edit, and delete previously saved CMAs.
- Click the triangle next to Sent Email to view Direct Email, Auto Email and CMAs along with their respective view history and content. (See "Viewing Sent Email History" on page 39 for details.)
- Click the checkbox next to a contact and click **Delete Contact** to remove the selected contact.
- Click the checkbox next to a contact and click the **Set Active** or **Set Inactive** button to change the selected contact's status to Active or Inactive.

Customizing Email Settings

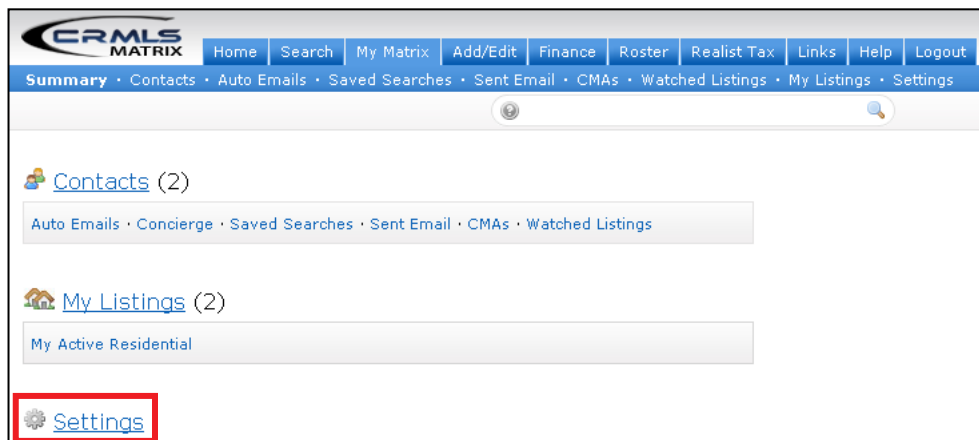
Before you send emails to your clients, you should create an email signature and customize your header/footer for the Client Portal and printed reports. Follow the steps in these sections to get started:

- “Creating an Email Signature” on page 9
- “Customizing Your Header/Footer” on page 10

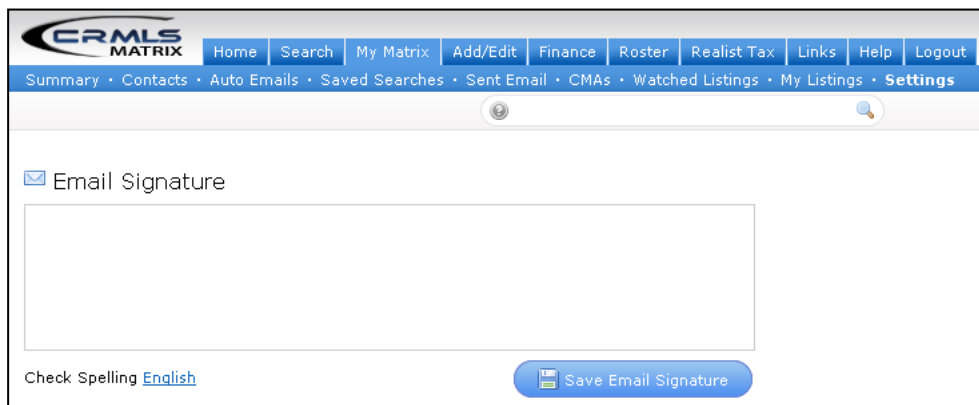
Creating an Email Signature

When you send an email from the CRMLS Matrix Platform, your email signature will appear at the bottom of the email. Follow the steps below to create an email signature in CRMLS Matrix.

1. Click **Settings** on the My Matrix tab.



2. Enter your Email Signature.



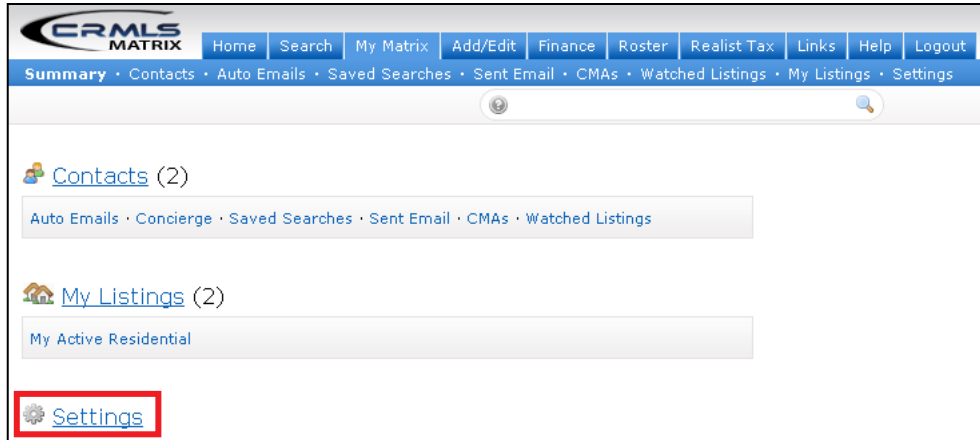
3. Click the **English** Check Spelling link to spell check your email signature.

4. Click **Save Email Signature** when you're done entering your email signature.

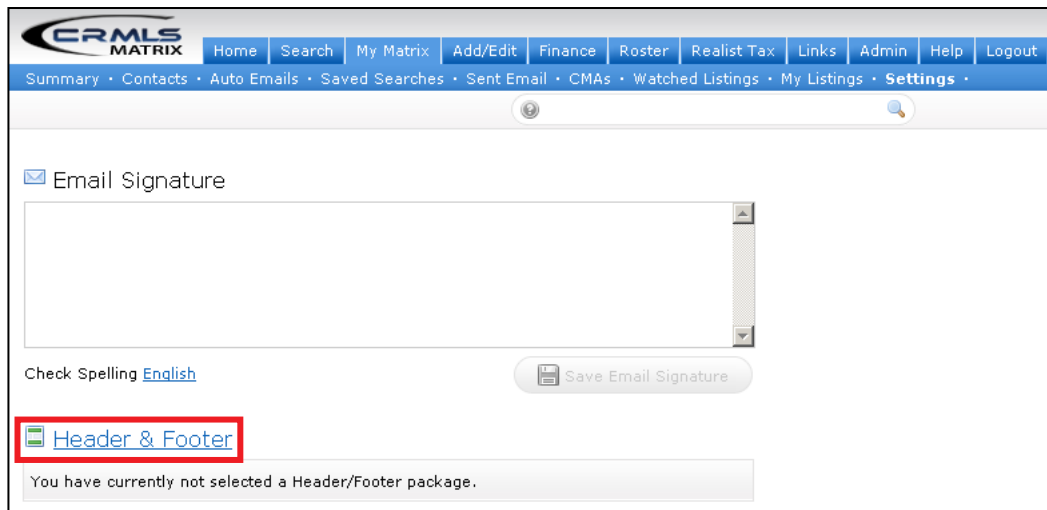
Customizing Your Header/Footer

The CRMLS Matrix Platform allows you to customize the header and footer that's appended to emails and on your print displays. The Header and Footer give you the ability to add a custom picture, logo, motto, and personal contact information on any listing display in Matrix.

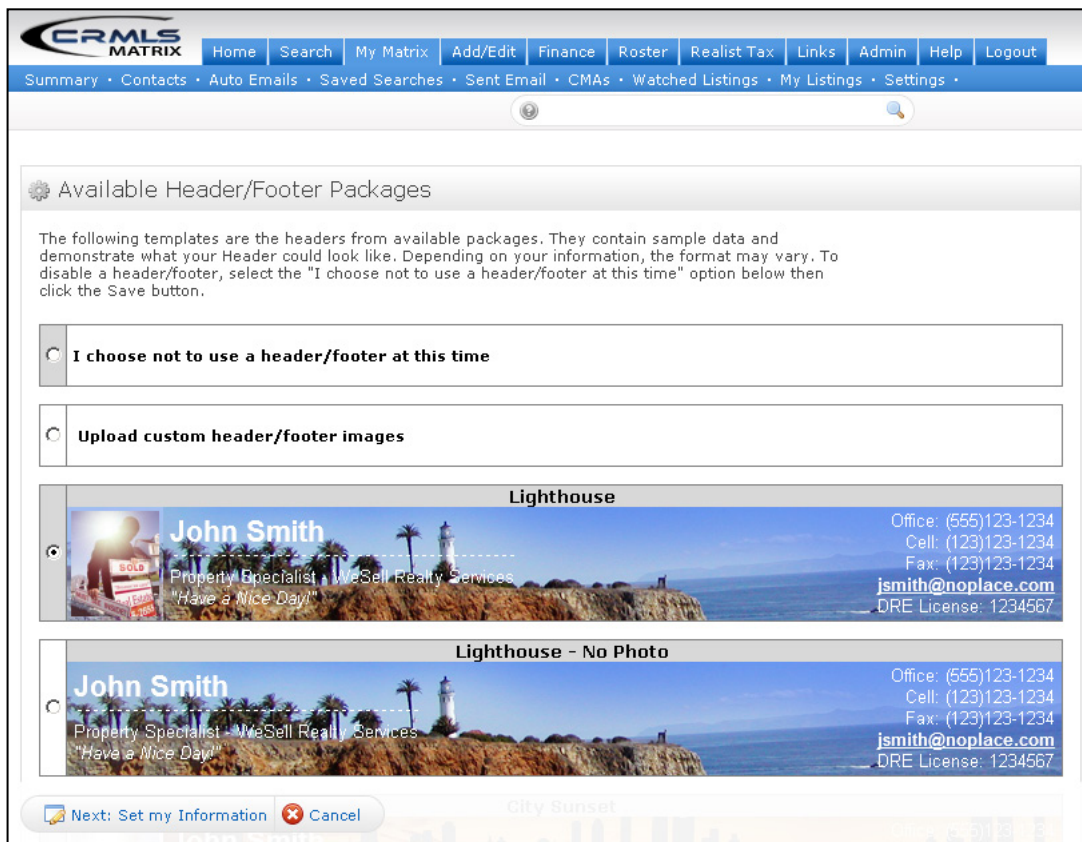
1. Click the **Settings** link on the My Matrix tab.



2. Click the Header & Footer link.



3. Select one of the Available Header/Footer Packages. Select the a header/footer with the No Photo option if you don't want to include your photo in the header/footer.



4. Click the **Next: Set my Information** button when you're done selecting a header/footer package.

5. Scroll down to the Details section and click the **Click here to prefill your details** link to pre-fill your contact information from the Matrix roster or manually enter you contact information.

The information you enter will be displayed on all of your client portal and report headers and footers.

Print Header

Agent Name
Office Name

Office: 909-555-1212
Fax: 909-555-1212
DRE License: 11111111

Details

Fill in your details below that you wish to be displayed in your header/footer.
Some of the fields may appear on both the header and footer.
[Click here to prefill your details based on your agent roster information.](#)
Click the Preview button to see what your information will look like in the header and/or footer.

First Name:

Last Name:

Public Email Address:

Title of Employment:

Cell Phone Number:

Agency/Office:

Office Phone Number:

Office Fax Number:

Tag Line: (i.e., Slogan)

DRE License Number:

Your Photo

To upload your photo, click the Browse button and choose the image file to upload.
Optimal Image Size: **66 x 79** pixels.

Your Photo file location:

Click the Preview button to view your complete package prior to saving.
Please wait until all images have been loaded before clicking the Save button.
Note: If you have previously uploaded images for a custom header/footer, saving this

6. If you selected a header/footer that allows you to include your photo, click the **Browse** button.
7. Locate and select the photo you want to upload.
8. Click the **Preview** button to preview your header and footer.
9. Click the **Save** button to save your header and footer.

Emailing Listings Directly

The CRMLS Matrix Platform allows you to email listing reports or links to listings, for display in the Client Portal, directly from the search results page. Follow the steps in these sections to get started:

- “Emailing Listings for Display in the Client Portal” below
- “Emailing listings as a PDF Report” on page 15

Emailing Listings for Display in the Client Portal

1. Click the checkbox next to each listing you want add to your client’s Portal.
2. Click the **Email** button.

The screenshot shows the CRMLS Matrix search results page. At the top, there is a navigation bar with links: Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, Logout. Below the navigation bar, the page title is "Residential • Detail • MLS#" and the search criteria is "a sfr pomona 687".

The main content area displays a list of listings. The first five listings are visible, each with a checkbox in the left margin. The listings are:

ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM
<input checked="" type="checkbox"/> C11011632	A SFR/D	11080	Kadota AV	POM	687	641D2	\$95,000 ↓	2/1.00	1940/ASS	890	4,950	81/81
<input type="checkbox"/> Y1100494	A SFR/D	560	REGENE ST	POM	687	641A2	\$99,000 ↓	1/1.00	1929/ASS	608	2,640	86/86
<input checked="" type="checkbox"/> C11044233	A SFR/D	1488 W	Orange Grove AV	POM	687		\$104,900	2/1.00	1948/ASS	789	13,891	8/8
<input checked="" type="checkbox"/> C10114447	A SFR/D	830	Laurel AV	POM	687		\$108,500 ↓	2/1.00	1924	724	8,742	168/168
<input type="checkbox"/> P776618	A SFR/D	384 W	ARTESIA ST	POM	687	600H6	\$120,000	2/1.00	1948	800	7,620	15/15
<input checked="" type="checkbox"/> C10042626	A SFR/A	818	12TH	POM	687	640H3	\$125,000 ↓	3/1.00		1,727	6,238	194/194

At the bottom of the page, there is a toolbar with buttons: Revise, Email, Report, CMA, Map, Stats, Save As. The "Email" button is highlighted with a red box. To the right of the toolbar, there are buttons for "Narrow", "Discard", and "Export".

3. Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's e-mail address in the **To:** field.

Note:

- To select more than one contact, hold down the **CTRL** key on your keyboard as you select them.
- If your e-mail address doesn't appear in the **From:** field, you will need to add your e-mail address to your CRMLS Matrix account. Click the **Add/Edit** tab, type your Agent ID in the **Quick Modify** field under **Roster**, then click the **Edit** link.

The screenshot shows the CRMLS Matrix web interface. At the top, there is a navigation bar with the CRMLS Matrix logo and several menu items: Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, and Logout. Below the navigation bar, the breadcrumb trail reads 'Residential · Detail · MLS#'. The main content area is titled 'Email 8 Listings' and contains an email composition form. The form includes a 'From:' field with a dropdown menu, 'To:' and 'CC:' buttons, a 'Create a New Contact' link, a checkbox for 'Bcc me a copy of this message.', a 'Display:' field with the text 'All customer displays are automatically available to your contact.', a 'Subject:' text field, and a large 'Email Body:' text area. At the bottom of the form, it says 'Characters Remaining: 4096' and 'Check Spelling English'. At the very bottom of the form, there are three buttons: 'Preview', 'Cancel', and 'Send'.

4. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you're sending.
5. Enter a subject for the e-mail in the **Subject** text field.
6. Enter a message for your client in the **Email Body** text field. You can enter up to 4096 characters in the Email Body text field.
7. Click the **English** link to spell check the message you typed in the Email Body text field.
8. Click the **Preview** button to preview the email message before sending it to your client.
9. Click the **Send** button to send the selected listings to your client.

Emailing listings as a PDF Report

Follow the steps below to email listing reports. Before you begin, make sure that you've performed a search and are on the search results page.

1. Click the checkbox next to each listing you want to email in a report.
2. Click the **Report** button.

CRMLS MATRIX

Home Search My Matrix Add/Edit Finance Roster Realist Tax Links Help Logout

Residential • Detail • MLS#

a sfr pomona 687

1-25 of 339 • Checked 4 • [Check all 339](#)

Display Agent 1 Line at 25 per page • View as

Previous • [Next](#) • [1] [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) ...

<input type="checkbox"/>	ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM
<input checked="" type="checkbox"/>	C11011632	A SFR/D	11080	Kadota AV	POM	687	641D2	\$95,000 ↓	2/1.00	1940/ASS	890	4,950	81/81
<input type="checkbox"/>	Y1100494	A SFR/D	560	REGENE ST	POM	687	641A2	\$99,000 ↓	1/1.00	1929/ASS	608	2,640	86/86
<input checked="" type="checkbox"/>	C11044233	A SFR/D	1488 W	Orange Grove AV	POM	687		\$104,900	2/1.00	1948/ASS	789	13,891	8/8
<input checked="" type="checkbox"/>	C10114447	A SFR/D	830	Laurel AV	POM	687		\$108,500 ↓	2/1.00	1924	724	8,742	168/168
<input type="checkbox"/>	P776618	A SFR/D	384 W	ARTESIA ST	POM	687	600H6	\$120,000	2/1.00	1948	800	7,620	15/15
<input checked="" type="checkbox"/>	C10042626	A SFR/A	818	12TH	POM	687	640H3	\$125,000 ↓	3/1.00		1,727	6,238	194/194

Previous • [Next](#) • [1] [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) ... • [Top](#) • [Bottom](#)

Revise Email **Report** CMA Map Stats Save As

687 600E7 \$135,900 ↓ 2/1.00 1950

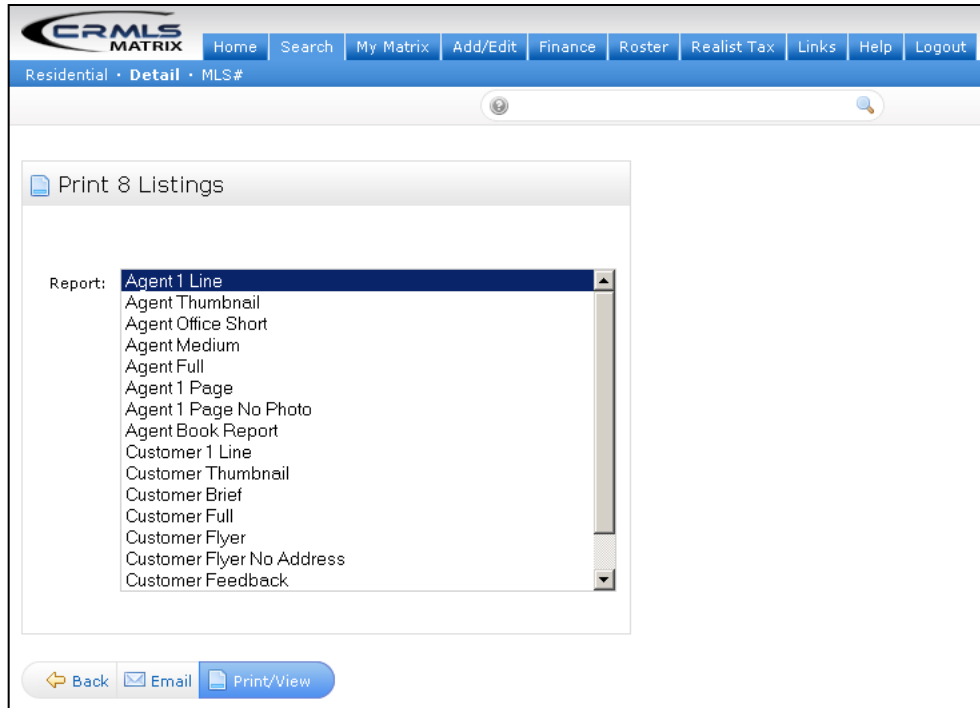
687 601A7 \$138,900 ↓ 2/1.00 1924

Carts

Narrow Discard Export

3. Select the report you want to email.

To select more than one report, hold down the **CTRL** key on your keyboard as you select the reports you want to email.



Note:

- To preview the Report, click the **Print/View** button.
- The Agent Full, Agent 1 Page, and Agent Book reports are not available to email.

4. Click the **Email** button.

5. Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's e-mail address in the **To:** field.

The screenshot shows the 'Email Reports' interface in the CRMLS Matrix system. The top navigation bar includes links for Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, and Logout. The breadcrumb trail indicates 'Residential · Detail · MLS#'. The main form area is titled 'Email Reports' and contains the following elements:

- From:** A field with a dropdown arrow, currently showing a placeholder email address.
- To:** A button with a dropdown arrow next to an empty text input field.
- CC:** A button with a dropdown arrow next to an empty text input field.
- [Create a New Contact](#) (blue link)
- Bcc me a copy of this message.
- You have selected 1 report to email.**
- Report:** Customer Brief
- Subject:** An empty text input field.
- Email Body:** A large, empty text area for composing the message.
- Characters Remaining:** 4092
- [Check Spelling English](#) (blue link)
- Buttons:** Cancel (with a red 'x' icon) and Send (with a blue envelope icon).

Note:

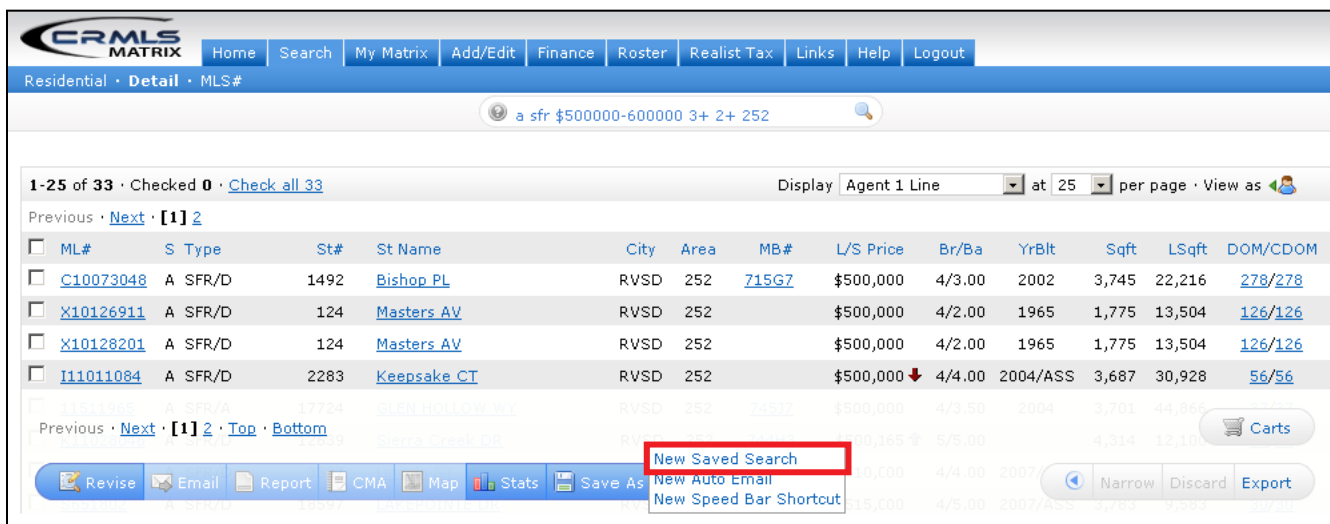
- To select more than one contact, hold down the **CTRL** key on your keyboard as you select them.
 - If your e-mail address doesn't appear in the **From:** field, you will need to add your e-mail address to your CRMLS Matrix account. Click the **Add/Edit** tab, type your Agent ID in the **Quick Modify** field under **Roster**, then click the **Edit** link.
6. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you're sending.
 7. Enter a subject for the e-mail in the **Subject** text field.
 8. Enter a message for your client in the **Email Body** text field. You can enter up to 4096 characters in the Email Body text field.
 9. Click the **English** link to spell check the message you typed in the Email Body text field.
 10. Click the **Preview** button to preview the email message before sending it to your client.
 11. Click the **Send** button to send the selected report to your client in PDF format.

Saving Searches

Saved searches allow you to set up customized search criteria for each of your clients. You can also use saved searches as a base for creating Auto Emails and Favorite Searches.

Saving a Search

1. From the Search results page, click the **Save As** button.
2. Select **New Saved Search** from the pop-up Menu.



3. Type a name for your search in the Search Name field.



- To assign this search to a client, select a client from the Contact drop-down list.

Note:

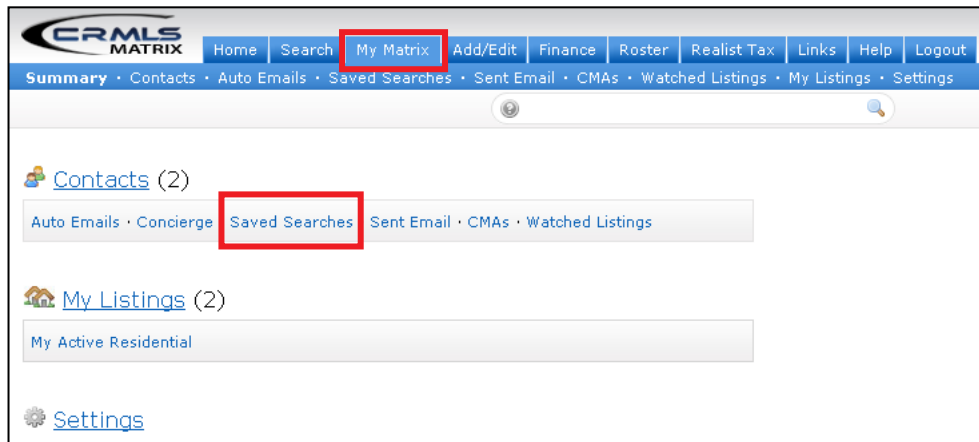
If the contact you're looking for isn't in the contact list, you can add a new contact by clicking the **Create a New Contact** link.

- To add the search to the My Favorite Searches widget on the Matrix Home tab, click the **Enable as Favorite Search** checkbox.
- When you're done, click **Save** to save your search.

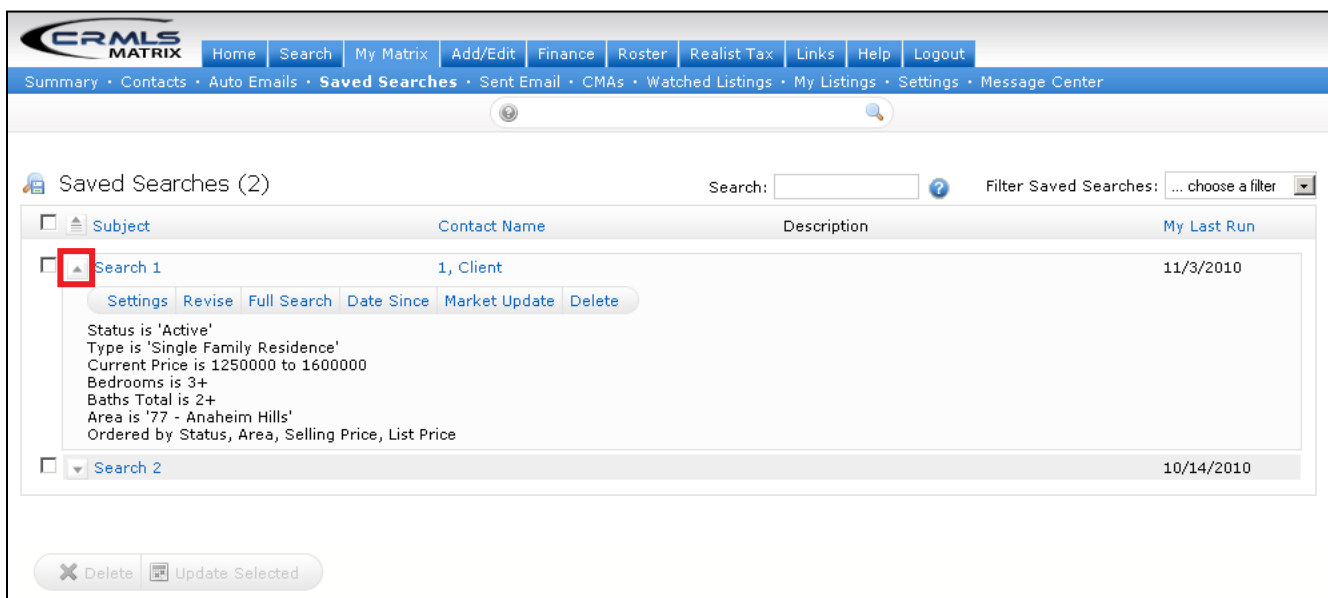
Managing Saved Searches

Follow the steps below to manage your saved searches.

- From the My Matrix tab, click **Saved Searches**.



- Click the triangle next to a saved search to display search options.



3. To manage your saved search, do the following:

- Click **Settings** to change the Search Name, Description, Primary Contact, and to enable/disable Favorite Searches and Auto Emails.
- Click **Revise** to update your search criteria.
- Click **Full Search** to run the saved search.
- Click **Date Since** to run the saved search and only display new results from the last date and time you ran the saved search.
- Click **Market Update** to run a search with a specified date range or from the last date you ran the search.

Note:

Use the Filter Saved Searches drop-down list to quickly sort and find your saved searches.

4. To delete a saved search, click **Delete**.

Emailing Listings Automatically

Automatic emails allow you to quickly and easily turn your saved searches into automatic email updates that instantly notify your clients of new and changed listings. Before you begin, make sure that you've created an email signature and set up your header/footer information as described in "Emailing Listings Directly" on page 13. Then follow the steps in these sections to get started:

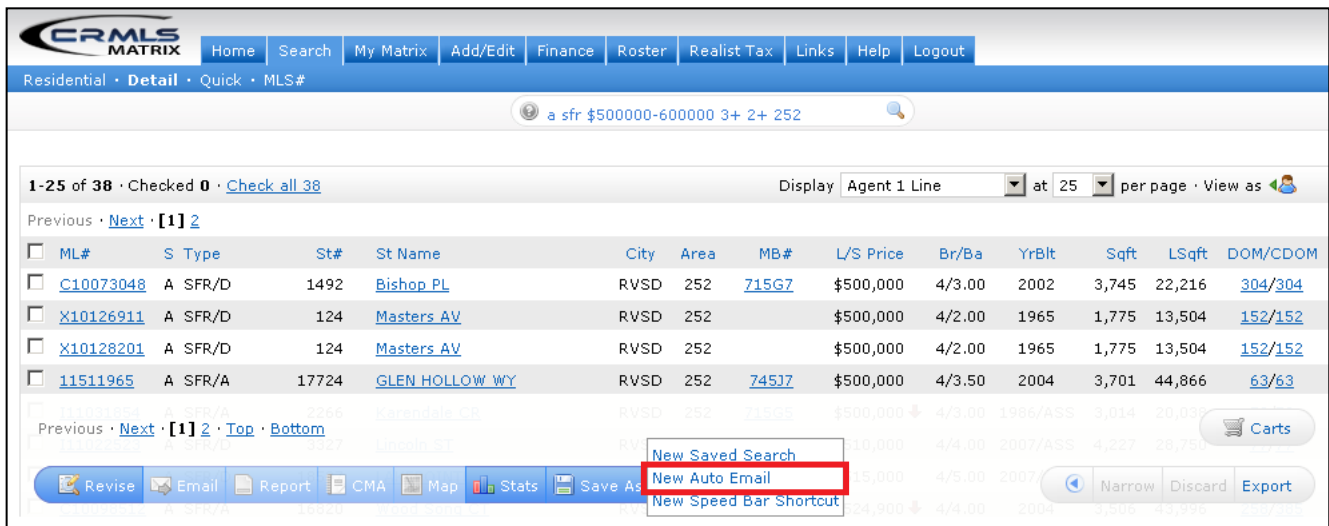
- "Creating Auto Emails from Search Results" on page 21
- "Creating Auto Emails from a Saved Searches" on page 24
- "Managing Auto Emails" on page 28

Note:

For complete control over the listings that are sent to your clients, enable concierge mode for your auto emails to approve or reject listings before sending them to your client. See "Auto Email Concierge" on page 30 for details.

Creating Auto Emails from Search Results

1. Once you have run your search and are on the results page, click the **Save As** button, then select **New Auto Email** in the pop-up menu.



Note:

You can also create Auto Emails from Saved Searches. For more information, see "Creating Auto Emails from a Saved Searches" on page 24.

You can enable up to 250 Auto Emails and have an unlimited number of saved searches.

2. On the Save a New Auto Email page, select a contact from the **Contact** drop-down list to assign the auto email to an existing contact. To add a new contact, click the **Create a New Contact** link, then see follow the prompts on the screen.

The screenshot shows the 'Save a New Auto Email' form in the CRMLS Matrix application. The form is titled 'Save a New Auto Email' and is located within a navigation menu that includes 'Home', 'Search', 'My Matrix', 'Add/Edit', 'Finance', 'Roster', 'Realist Tax', 'Links', 'Help', and 'Logout'. Below the navigation menu, there is a secondary menu with 'Summary', 'Contacts', 'Auto Emails', 'Saved Searches', 'Sent Email', 'CMAs', 'Watched Listings', 'My Listings', and 'Settings'. The form itself has a 'Contact:' dropdown menu with a red box around it, and a 'Create a New Contact' link next to it. Below the 'Contact:' field are fields for 'To:', 'CC:', and 'BCC:'. There is also a checkbox labeled 'BCC me a copy of all emails'. The 'Subject:' field is highlighted in yellow. The 'Message:' field is a large text area with a scroll bar. At the bottom of the form, there is a 'Check Spelling' link with 'English' next to it.

3. Enter a subject for the email in the **Subject** field.
4. Select **BCC me a copy of all emails** to receive a blind carbon copy of auto emails sent to the client.
5. If you want to send the auto email to an additional email address, the address in the **CC:** field.
6. If you want to send the auto email to an additional email address without the client seeing who it was sent to, enter the address in the **BCC:** field.
7. CRMLS Matrix will automatically populates the message field. If you want to add a personal message before the auto populated text, enter it in the **Message** field.

Note:

When sending the initial auto email to a client, you should leave the Message field blank. This will send out a message welcoming your client to the Portal and provide them with general information on how to work with the Portal.

8. Select **Make available for Reverse Prospecting** to allow a listing agent to see if their listing was sent in an auto email.

Settings

Enable concierge mode

Make available for Reverse Prospecting

Enable as a Favorite Search on Home tab (12 maximum)

Schedule

ASAP: Emails are sent as soon as possible.

Daily: Emails are sent on the days you choose.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

[Clear](#)

Monthly: Emails are sent on the first of the month at midnight.

Cancel Save

Note:

For complete control over listings sent to your clients when using the Auto Email feature, refer to “Auto Email Concierge” on page 30.

9. Select **Enable as a Favorite Search** to add the search to the Favorites Searches list on the CRMLS Matrix Home tab.
10. Select a Schedule setting to specify when auto emails are sent to your client. The **Daily** setting allows to send emails every day at 8:00AM or 6:00PM, the **ASAP** setting sends auto emails as soon as possible, and the **Monthly** setting sends emails at midnight on the first of the month.
11. Click the **Save** button to save your Auto Email.

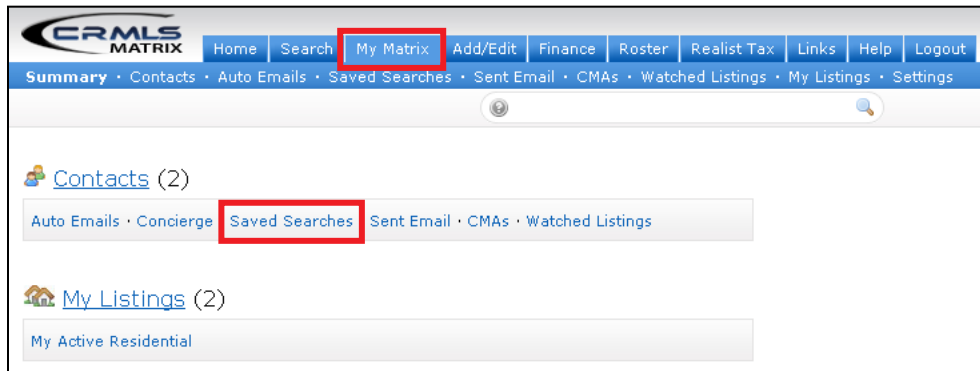
Note:

If your Auto Email returns more than 250 listings, you will receive a message letting you know that your Auto Email has been disabled. To reactivate your auto email, access your Saved Search in the My Matrix tab, narrow your search criteria, and re-activate the Auto Email. If necessary, you can set up multiple saved searches for a single client.

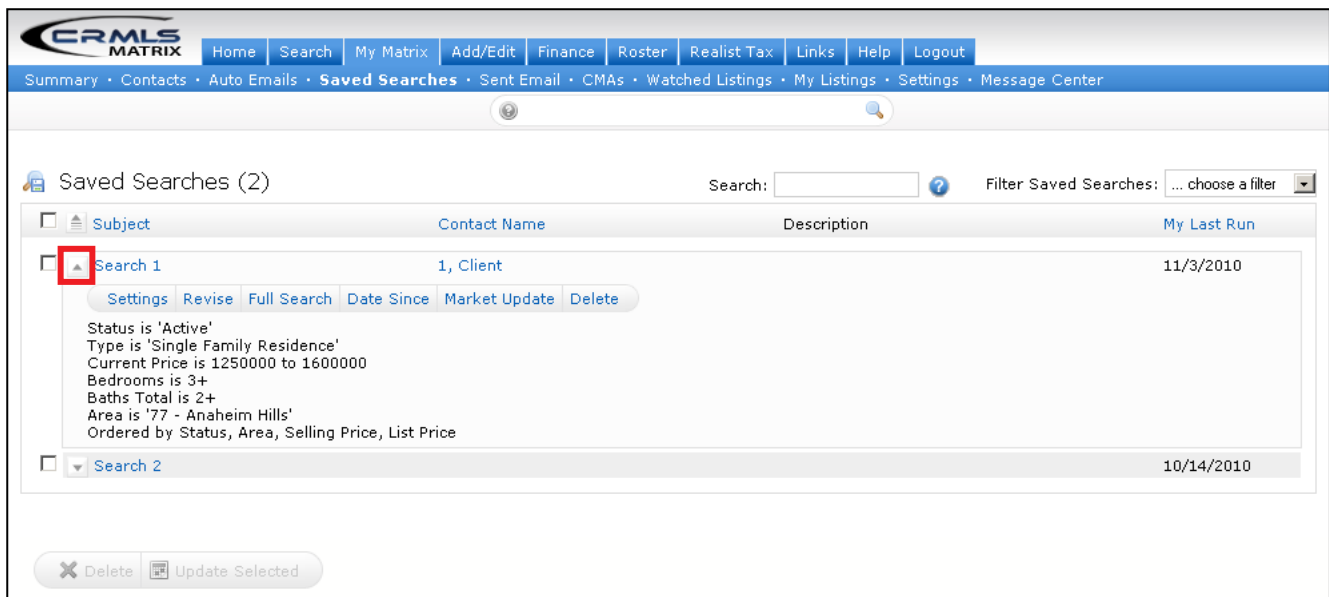
Creating Auto Emails from a Saved Searches

Follow the steps below create an Auto Email from a Saved Search.

1. Click the **Saved Searches** link on the **My Matrix** tab.



2. Located the saved search you want to turn into an Auto Email notification.
3. Click the triangle next to the saved search to display saved search options.



Note:

If you have a lot of saved searches, you can filter them using the **Filter Saved Searches** drop-down menu.

4. Click the **Settings** button.

The screenshot shows the CRMLS MATRIX web application. The top navigation bar includes links for Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, and Logout. Below this is a secondary navigation bar with links for Summary, Contacts, Auto Emails, Saved Searches, Sent Email, CMAs, Watched Listings, My Listings, Settings, and Message Center. The main content area displays a table of saved searches. The first search, 'Search 1', is selected and expanded to show its details: Status is 'Active', Type is 'Single Family Residence', Current Price is 1250000 to 1600000, Bedrooms is 3+, Baths Total is 2+, Area is '77 - Anaheim Hills', and Ordered by Status, Area, Selling Price, List Price. A red box highlights the 'Settings' button located above the search details. Other buttons for 'Revise', 'Full Search', 'Date Since', 'Market Update', and 'Delete' are also visible. The table also shows 'Search 2' with a last run date of 10/14/2010. At the bottom, there are buttons for 'Delete' and 'Update Selected'.

5. Click the **Turn this Saved Search into an Auto Email** link.

The screenshot shows the 'Settings for Search 1' dialog box in the CRMLS MATRIX application. The dialog box contains the following information: Search Name: Search 1; Contact: a dropdown menu with a 'Create a New Contact' link; Criteria: Status is 'Active', Type is 'Single Family Residence', Current Price is 1250000 to 1600000, Bedrooms is 3+, Baths Total is 2+, Area is '77 - Anaheim Hills', and Ordered by Status, Area, Selling Price, List Price. There is a checkbox labeled 'Enable as Favorite Search on Home tab (12 maximum)'. At the bottom of the dialog box, there are 'Cancel' and 'Save' buttons. A red box highlights the link 'Turn this Saved Search into an Auto Email' located above the dialog box. The background shows the same navigation bars as the previous screenshot.

6. On the Save a New Auto Email page, select a contact from the **Contact** drop-down list to assign the auto email to an existing contact. To add a new contact, click the **Create a New Contact** link, then see follow the prompts on the screen.

The screenshot shows the 'Save a New Auto Email' form in the CRMLS Matrix application. The form is titled 'Save a New Auto Email' and is located within a navigation menu that includes 'Home', 'Search', 'My Matrix', 'Add/Edit', 'Finance', 'Roster', 'Realist Tax', 'Links', 'Help', and 'Logout'. Below the navigation menu, there is a breadcrumb trail: 'Summary > Contacts > Auto Emails > Saved Searches > Sent Email > CMAs > Watched Listings > My Listings > Settings'. The form itself has a title bar with a folder icon and the text 'Save a New Auto Email'. The main content area contains the following fields and options:

- Contact:** A dropdown menu with a red box around it. To its right is a blue link labeled 'Create a New Contact'.
- To:** A text input field.
- CC:** A text input field.
- BCC:** A text input field.
- BCC me a copy of all emails
- Subject:** A text input field with a light green background.
- Message:** A large text area with a vertical scrollbar.
- At the bottom left, there is a 'Check Spelling' link with 'English' as a sub-link.

7. Enter a subject for the email in the **Subject** field.
8. Select **BCC me a copy of all emails** to receive a blind carbon copy of auto emails sent to the client.
9. If you want to send the auto email to an additional email address, the address in the **CC:** field.
10. If you want to send the auto email to an additional email address without the client seeing who it was sent to, enter the address in the **BCC:** field.
11. CRMLS Matrix will automatically populate the message field. If you want to add a personal message before the auto populated text, enter it in the **Message** field.

Note:

When sending the initial auto email to a client, you should leave the Message field blank. This will send out a message welcoming your client to the Portal and provide them with general information on how to work with the Portal.

12. Select **Make available for Reverse Prospecting** to allow a listing agent to see if their listing was sent in an auto email.

Settings

Enable concierge mode

Make available for Reverse Prospecting

Enable as a Favorite Search on Home tab (12 maximum)

Schedule

ASAP: Emails are sent as soon as possible.

Daily: Emails are sent on the days you choose.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

[Clear](#)

Monthly: Emails are sent on the first of the month at midnight.

Note:

For complete control over listings sent to your clients when using the Auto Email feature, refer to “Auto Email Concierge” on page 30.

13. Select **Enable as a Favorite Search** to add the search to the Favorites Searches list on the CRMLS Matrix Home tab.
14. Select a Schedule setting to specify when auto emails are sent to your client. The **Daily** setting allows to send emails every day at 8:00AM or 6:00PM, the **ASAP** setting sends auto emails as soon as possible, and the **Monthly** setting sends emails at midnight on the first of the month.
15. Click the **Save** button to save your Auto Email.

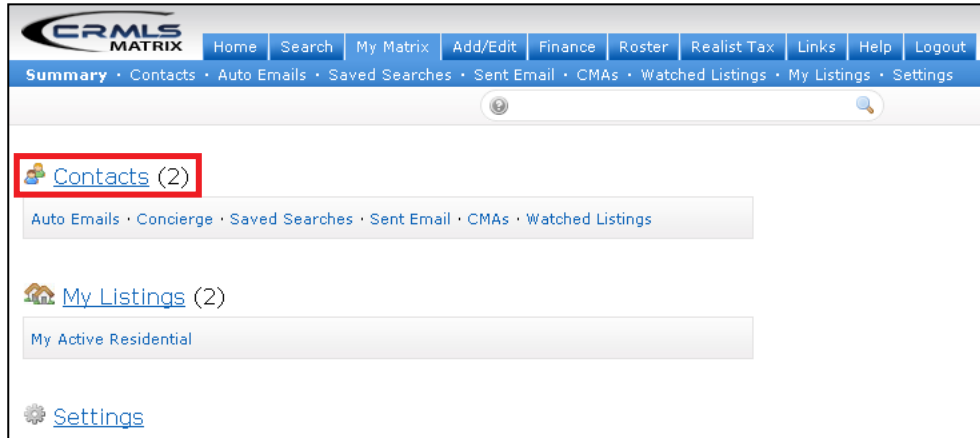
Note:

If your Auto Email returns more than 250 listings, you will receive a message letting you know that your Auto Email has been disabled. To reactivate your auto email, access your Saved Search in the My Matrix tab, narrow your search criteria, and re-activate the Auto Email. If necessary, you can set up multiple saved searches for a single client.

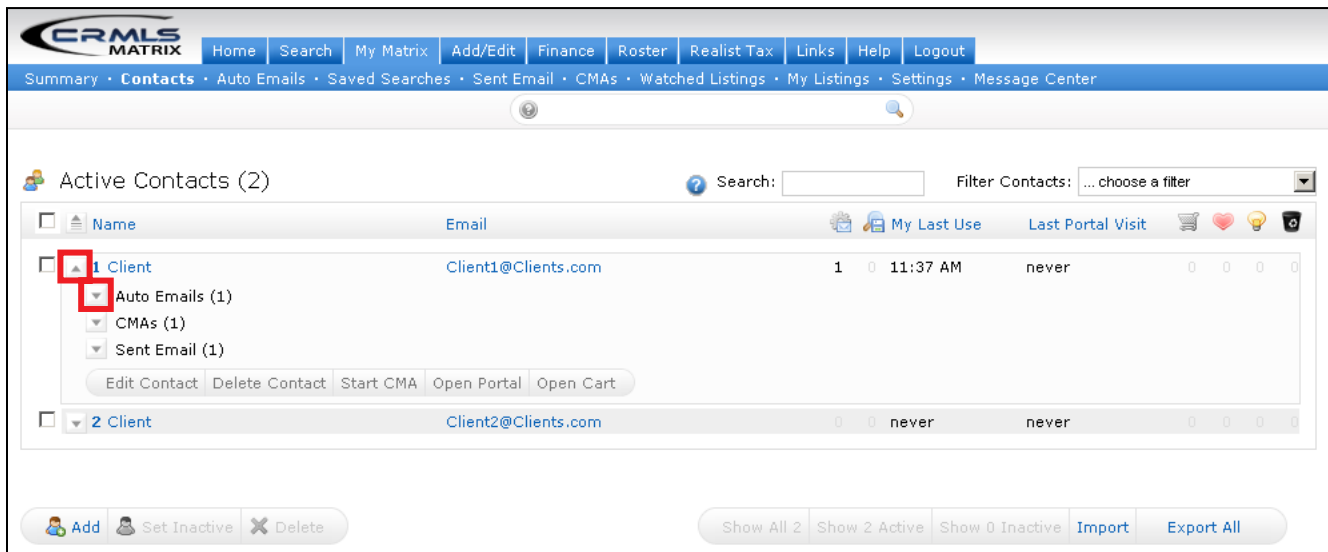
Managing Auto Emails

Auto Emails are created by an agent for clients who wants to receive automatic email notifications of listings that match specific criteria. Follow the instructions below to manage Auto Emails.

1. From the My Matrix tab click the **Contacts** link.



2. Click the triangle next to a contact to expand the contact.
3. Click the triangle next to **Auto Email** to modify and manage auto email settings.



Note:

The Code column shows the auto email's unique ID number used for Reverse Prospecting.

Tip:

Hover your mouse over the icon in the Status column for a pop-up definition of the auto email's status.

4. Click the triangle next to auto email to view auto email details and options.

CRMLS MATRIX

Home Search My Matrix Add/Edit Finance Roster Realist Tax Links Help Logout

Summary • **Contacts** • Auto Emails • Saved Searches • Sent Email • CMAs • Watched Listings • My Listings • Settings • Message Center

Active Contacts (2) Search: Filter Contacts: ... choose a filter

Name	Email	My Last Use	Last Portal Visit						
1 Client	Client1@Clients.com	1	0	11:37 AM	never	0	0	0	0

Auto Emails (1)

Subject	Last Portal View	My Last Run	Code	Status
New Listings for Riverside	never	11:37 AM	27602	😊

Settings Revise Full Search Date Since Market Update Open in Portal Delete Auto Email

Status is 'Active'
Type is 'Single Family Residence'
Current Price is 500000 to 600000
Bedrooms is 3+
Baths Total is 2+
Area is '252 - Riverside'
Ordered by Status, Area, Selling Price, List Price

CMAs (1)

Add Set Inactive Delete Show All 2 Show 2 Active Show 0 Inactive Import Export All

Now you can do the following:

- Click the **Settings** button, then refer to “Creating Auto Emails from Search Results” on page 21 for information on selecting auto email setting.
- Click the **Revise** button to update the search criteria for your Auto email. Be sure to click the Save button when you’re done updating your search criteria.
- Click the **Full Search** button to view all listings that match your search criteria.
- Click the **Date Since** button to view new listings since the search was generated.
- Click the **Market Update** button view new listings since the time the search was ran. You can also specify a date range or specific date to generate your search results.
- Click the **Open Portal** to view your clients favorite listings, possibilities and discarded listings. See “Viewing Your Client’s Auto Email Portal” on page 42.
- Click the **Delete Auto Email** button permanently remove the Auto Email from your contact.

Auto Email Concierge

The Auto Email Concierge gives you complete control over listings sent to your clients when using the Auto Email feature. When matching listings are found by your client’s Auto Email, they will appear in the Concierge. The Concierge will allow you to approve and reject listings and only listings that you approve will be emailed and made available in your client’s portal. The Concierge is especially helpful when you require close management of listings sent to your clients. Follow the steps in these sections to create a new Concierge Auto Email, approve or reject listings, and manage Auto Emails with Concierge enabled:

- “Creating a Concierge Auto Email” below
- “Filtering Listings in the Concierge” on page 32
- “Enabling Concierge Mode for Existing Auto Emails” on page 34
- “Disabling Concierge Mode for an Auto Email” on page 36
- “Auto Email Icons and Displays for Concierge Mode” on page 38

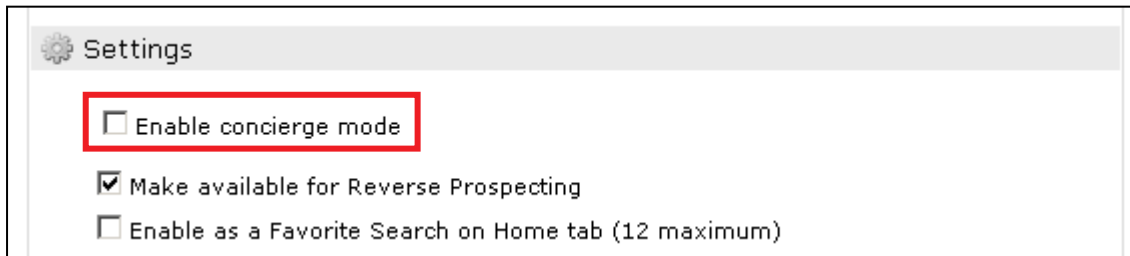
Creating a Concierge Auto Email

Follow the steps below to create a Concierge Auto Email. Before you begin, make sure that you’ve performed a search and are at the Search Results page.

1. From the Search Results page, click the **Save As** button and select **New Auto Email**.

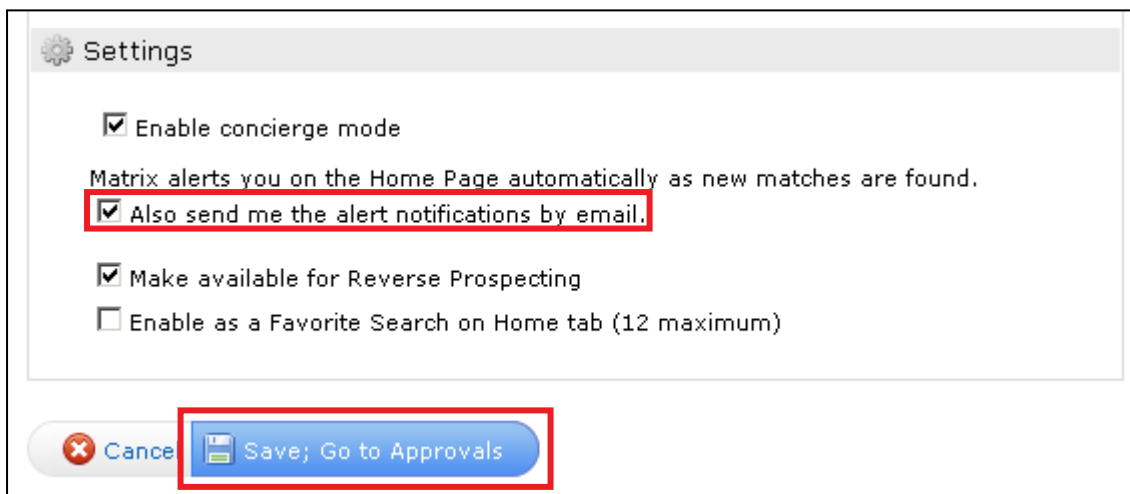
The screenshot shows the CRMLS Matrix interface. At the top, there's a navigation bar with links like Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, and Logout. Below that, a search bar contains 'a sfr pomona \$250000-275000'. The main content area displays a table of search results with columns for ML#, S Type, St#, St Name, City, Area, MB#, L/S Price, Br/Ba, YrBlt, Sqft, LSqft, DOM/CDOM, V, P, and SOC. The table lists several properties, including 'Carol DR', 'Kellogg Park DR', 'Fairfax LN', 'Regene ST', 'Adobe LN', 'Roberts ST', and 'Pearl ST'. At the bottom of the page, there's a 'Save As' dropdown menu that is open, showing options like 'New Saved Search', 'New Auto Email' (which is highlighted with a red box), and 'New Speed Bar Shortcut'. Other buttons like 'Revise', 'Email', 'Report', 'CMA', 'Map', 'Stats', 'Narrow', 'Discard', and 'Un-Discard' are also visible.

2. On the Save a New Auto Email page, select a contact from the **Contact** drop-down list to assign the auto email to an existing contact. To add a new contact, click the **Create a New Contact** link.
3. Enter a subject for the email in the **Subject** field.
4. Click the **Enable concierge mode** checkbox under the Settings section.



Once you click the Enable concierge mode checkbox, the scheduling options for your Auto email will be removed.

5. To receive an email alert when new listings are available for review, click the **Also send me the alert notifications by email** checkbox.
6. Click the **Save; Go to Approvals** button to save your Auto Email.

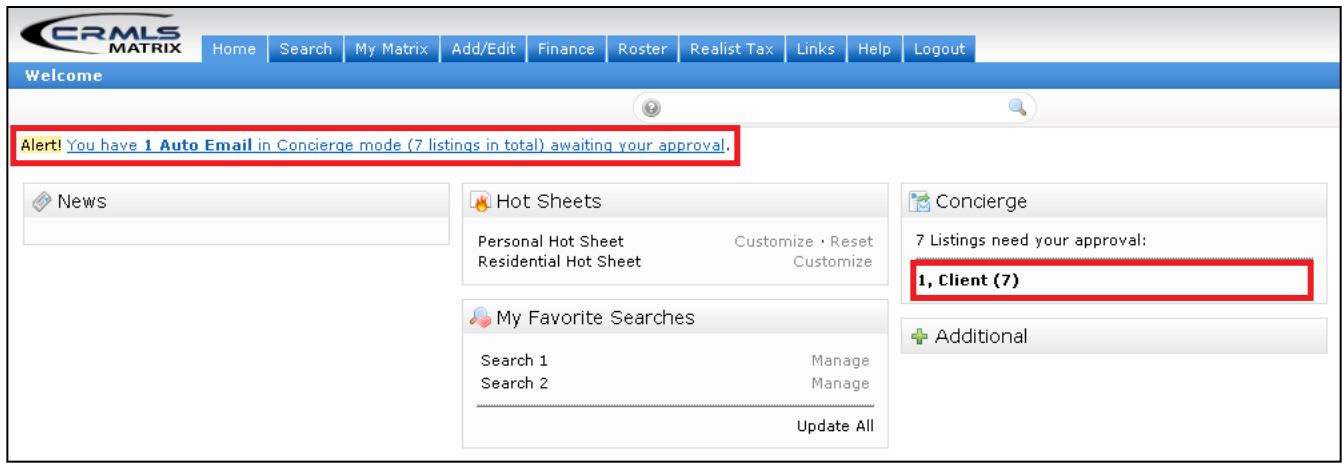


You see the Concierge Approvals Page. Continue with “Filtering Listings in the Concierge” on page 32.

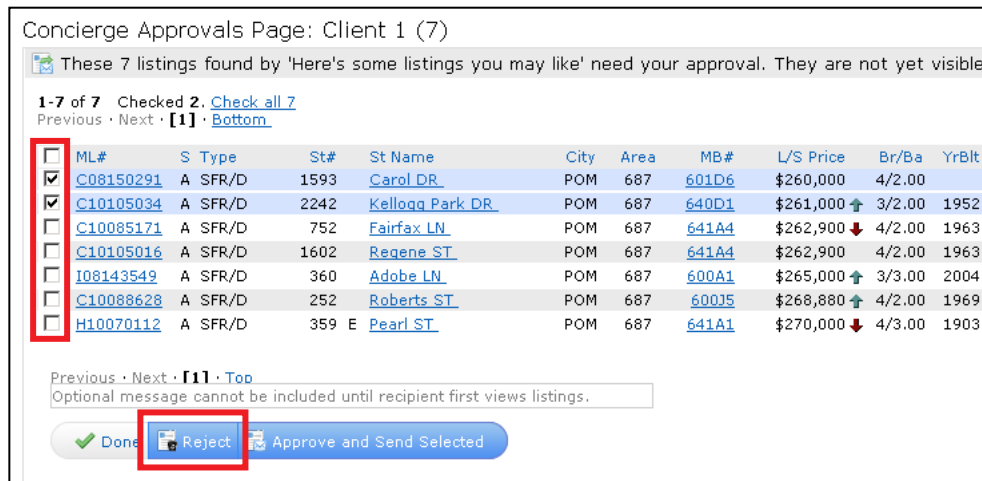
Filtering Listings in the Concierge

When you create an Auto Email with the Concierge enabled, you will be taken to the Concierge Approvals page to approve and reject listings for the initial Auto Email. When your Auto Email finds additional listings that match your criteria you will see a notification in the Concierge Widget on the Home tab and at the top of most pages in the CRMLS Matrix Platform. Depending on the notification settings you selected you may also receive an email letting you know that you have listings waiting for your approval. Follow the steps below to approve or reject listings for your Auto Email.

1. Click the notification link at the top of the CRMLS Matrix Platform or the link in the Concierge Widget on the Home tab to go to the Concierge Approvals Page.



2. Click the checkbox next to each listing you want to reject, then click the **Reject** button.



- Click the checkbox next to each listing you want to approve and send to your client.

Concierge Approvals Page: Client 1 (5)

These 5 listings found by 'Here's some listings you may like' need your approval. They are not yet visible.

1-5 of 5 Checked 3. [Check all 5](#)
[Previous](#) · [Next](#) · **[1]** · [Bottom](#)

<input type="checkbox"/>	ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt
<input checked="" type="checkbox"/>	H10070112	A SFR/D	359 E	Pearl ST	POM	687	641A1	\$270,000 ↓	4/3.00	1903
<input checked="" type="checkbox"/>	C10085171	A SFR/D	752	Fairfax LN	POM	687	641A4	\$262,900 ↓	4/2.00	1963
<input checked="" type="checkbox"/>	C10088628	A SFR/D	252	Roberts ST	POM	687	600J5	\$268,880 ↑	4/2.00	1969
<input type="checkbox"/>	C10105016	A SFR/D	1602	Regene ST	POM	687	641A4	\$262,900	4/2.00	1963
<input type="checkbox"/>	C10105034	A SFR/D	2242	Kellogg Park DR	POM	687	640D1	\$261,000 ↑	3/2.00	1952

[Previous](#) · [Next](#) · **[1]** · [Top](#)
 Optional message cannot be included until recipient first views listings.

- Once your client views the initial Auto Email, you can enter a message in the available field to provide your client with additional information about the listings you're sending to them.
- Click the **Approve and Send Selected** button.

Concierge Approvals Page: Client 1 (5)

These 5 listings found by 'Here's some listings you may like' need your approval. They are not yet visible.

1-5 of 5 Checked 3. [Check all 5](#)
[Previous](#) · [Next](#) · **[1]** · [Bottom](#)

<input type="checkbox"/>	ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt
<input checked="" type="checkbox"/>	H10070112	A SFR/D	359 E	Pearl ST	POM	687	641A1	\$270,000 ↓	4/3.00	1903
<input checked="" type="checkbox"/>	C10085171	A SFR/D	752	Fairfax LN	POM	687	641A4	\$262,900 ↓	4/2.00	1963
<input checked="" type="checkbox"/>	C10088628	A SFR/D	252	Roberts ST	POM	687	600J5	\$268,880 ↑	4/2.00	1969
<input type="checkbox"/>	C10105016	A SFR/D	1602	Regene ST	POM	687	641A4	\$262,900	4/2.00	1963
<input type="checkbox"/>	C10105034	A SFR/D	2242	Kellogg Park DR	POM	687	640D1	\$261,000 ↑	3/2.00	1952

[Previous](#) · [Next](#) · **[1]** · [Top](#)
 Optional message cannot be included until recipient first views listings.

Note:

Once you approve or reject a listing it will always be approved or rejected and will not be reconsidered for this Auto Email. To approve previously rejected listings, click the **Show Rejected** button, click the checkbox next to each listing you want to approve, then click the **Approve and Send** button.

If you're unsure of a few listings, they can be left in the Concierge Approvals Page for approval or rejection at a later date. Leaving listings in the Concierge will result in the alert message remaining at the top of the CRMLS Matrix Platform and in the Concierge Widget on the Home tab.

- When you're done approving and rejecting listings, click the **Done** button.

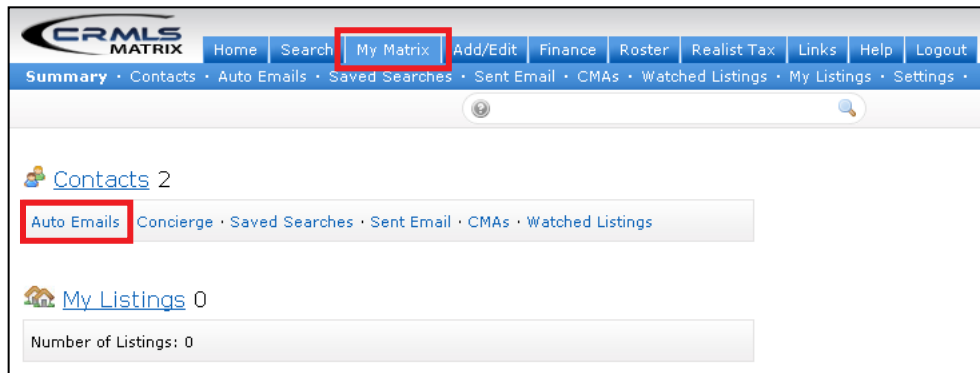
Enabling Concierge Mode for Existing Auto Emails

Follow the steps below to enable Concierge for an existing auto email.

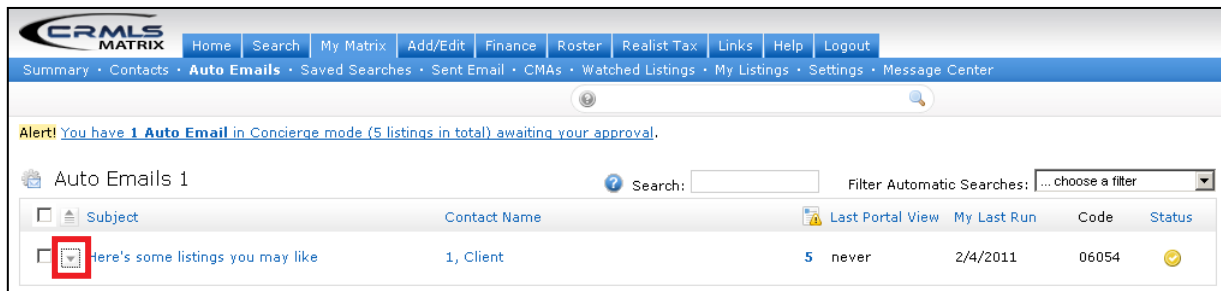
Note:

Any listings waiting in the Concierge and listings that you've previously rejected will automatically be sent to your client when the Concierge is disabled.

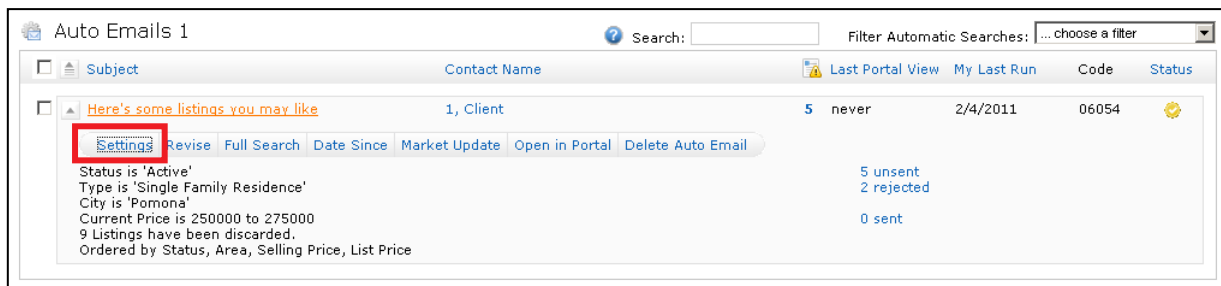
1. Click the **My Matrix** tab.
2. Click **Auto Emails**.



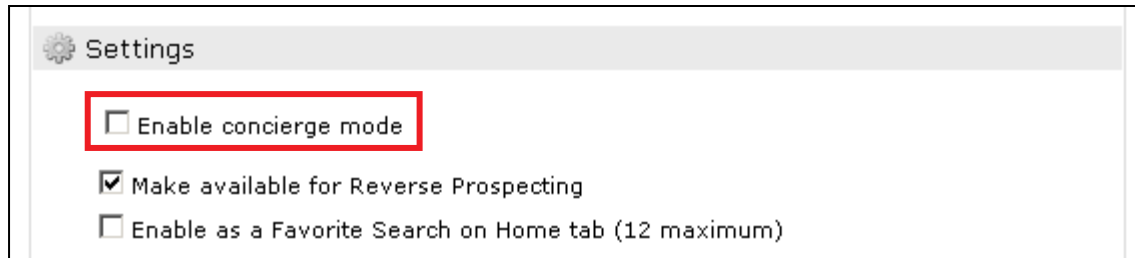
3. Click the arrow next to the Auto Email you want modify.



4. Click the **Settings** button.

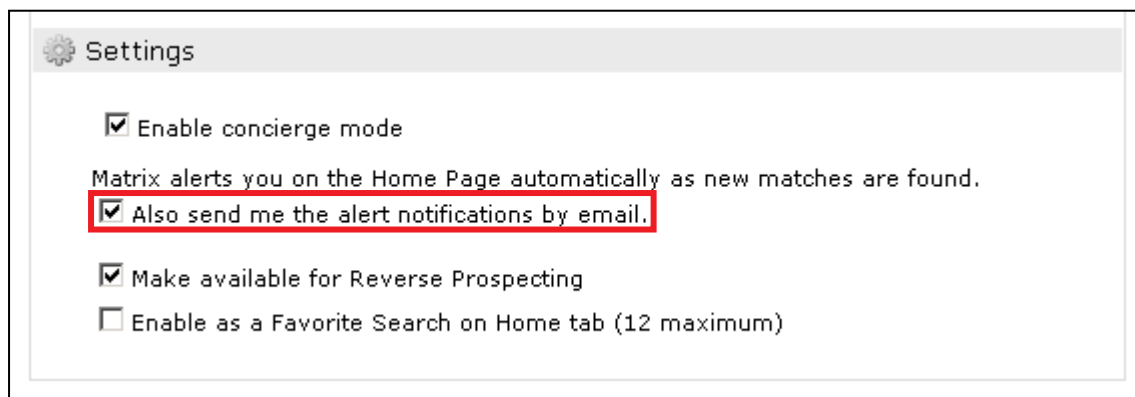


5. Click the **Enable concierge mode** checkbox under the Settings section.

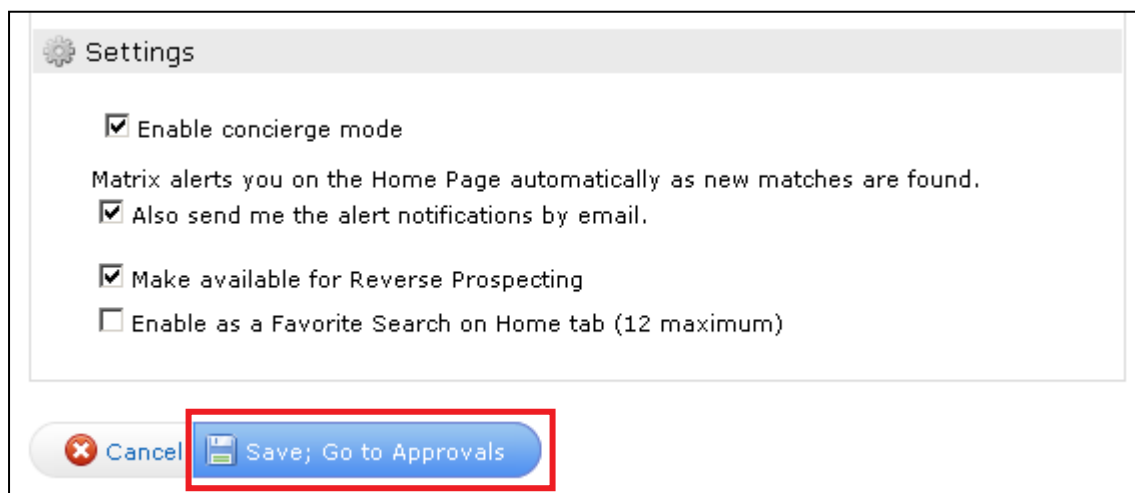


Once you click the Enable concierge mode checkbox, the scheduling options for your Auto email will be removed.

6. To receive an email alert when new listings are available for review, click the **Also send me the alert notifications by email** checkbox.



7. Click the **Save; Go to Approvals** button to save your Auto Email.



You see the Concierge Approvals Page. Continue with “Filtering Listings in the Concierge” on page 32.

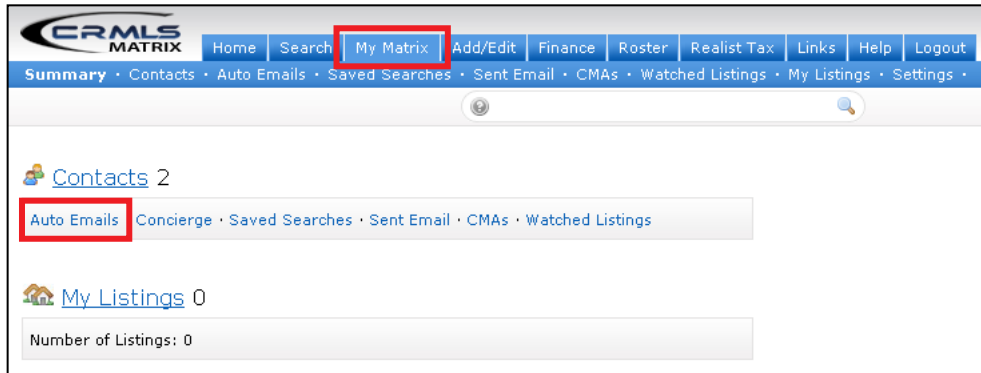
Disabling Concierge Mode for an Auto Email

Follow the steps below to disable the Concierge for an Auto Email.

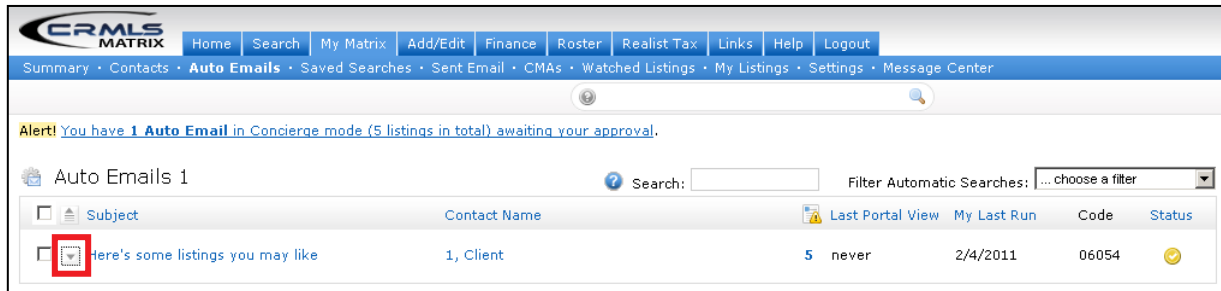
Note:

Any listings waiting in the Concierge and listings that you've previously rejected will automatically be sent to your client when the Concierge is disabled.

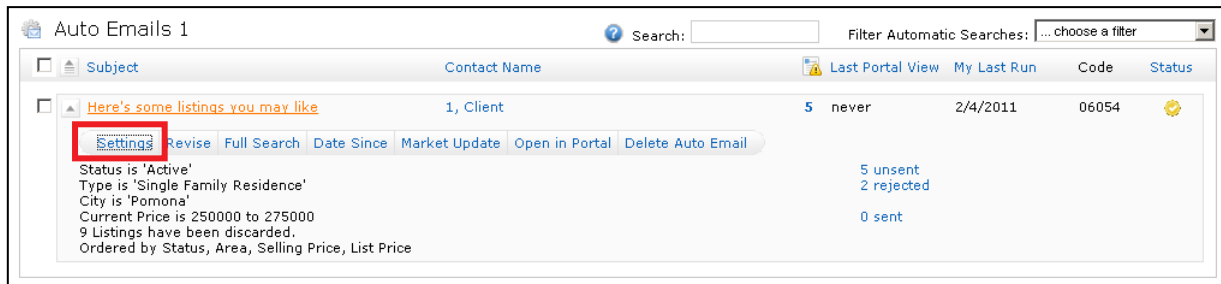
1. Click the **My Matrix** tab.
2. Click **Auto Emails**.



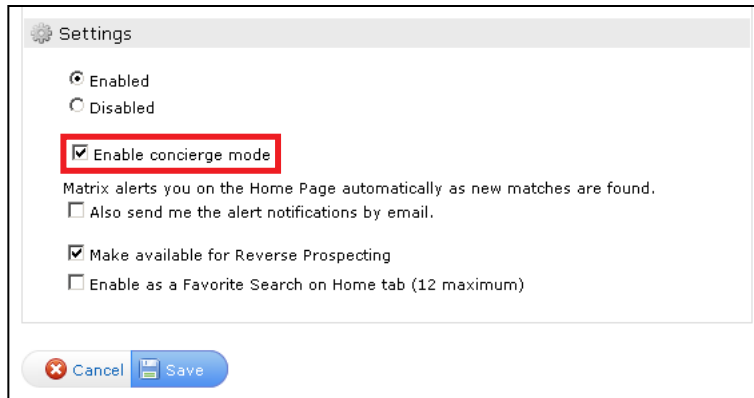
3. Click the arrow next to the Auto Email you want modify.



4. Click the **Settings** button.

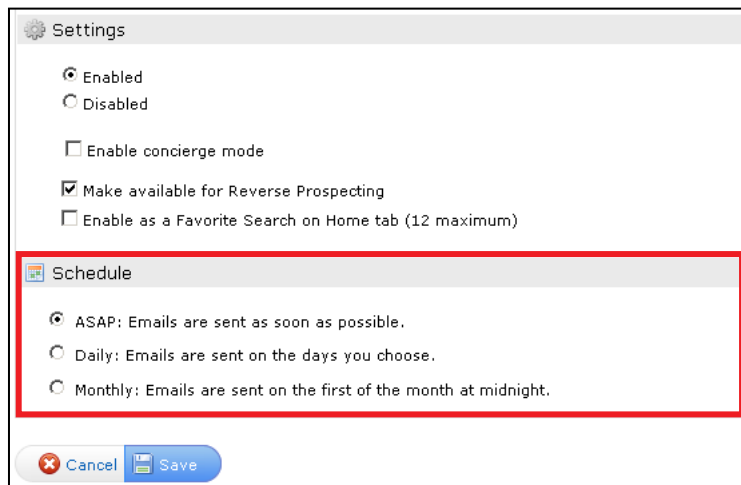


5. Uncheck the **Enable concierge mode** checkbox.



6. When you see the confirmation message, click **OK** to disable Concierge Mode.

7. Select Schedule options for your Auto Email as necessary.

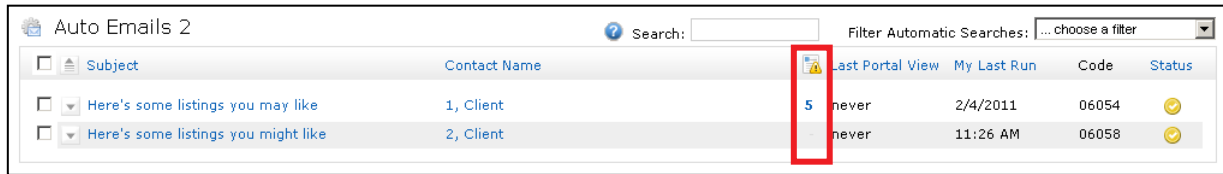


8. Click the **Save** button to save the changes for your Auto Email.

Auto Email Icons and Displays for Concierge Mode

The Auto Email display on the My Matrix tab has been updated with new icons and displays for Concierge.

A new **Unsent Results** column has been added to provide you with quick access the Concierge Approval Page. Click on a number the column to immediately jump to the corresponding Concierge Approvals Page.

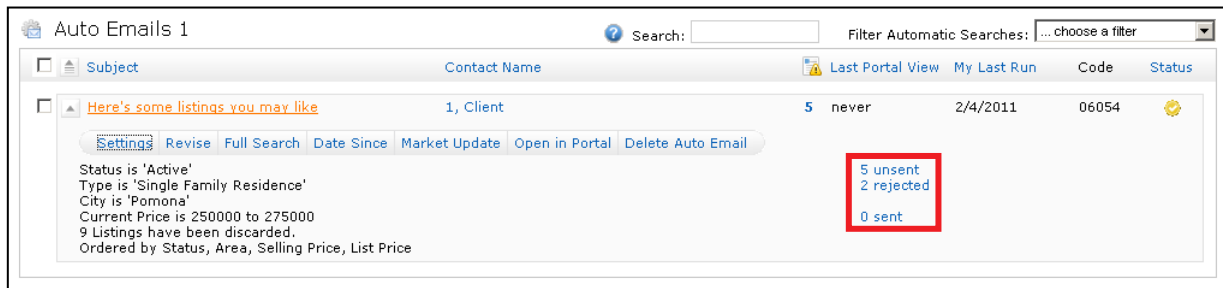


Subject	Contact Name	Unsent Results	Last Portal View	My Last Run	Code	Status
Here's some listings you may like	1, Client	5	never	2/4/2011	06054	🟢
Here's some listings you might like	2, Client		never	11:26 AM	06058	🟢

Note:

The Unsent Results column will display a dash for all Auto Emails with Concierge Mode disabled.

A summary of the listings that are waiting to be filtered, the number of listings you've rejected, and the number of listings you've sent has been added to Auto Email details. Click the links to go to the Concierge Approvals, Previously Rejected, and Sent listing pages.



Auto Emails 1

Subject	Contact Name	Unsent Results	Last Portal View	My Last Run	Code	Status
Here's some listings you may like	1, Client	5	never	2/4/2011	06054	🟢

[Settings](#) [Revise](#) [Full Search](#) [Date Since](#) [Market Update](#) [Open in Portal](#) [Delete Auto Email](#)

Status is 'Active'
Type is 'Single Family Residence'
City is 'Pomona'
Current Price is 250000 to 275000
9 Listings have been discarded.
Ordered by Status, Area, Selling Price, List Price

5 unsent
2 rejected
0 sent

Viewing Sent Email History

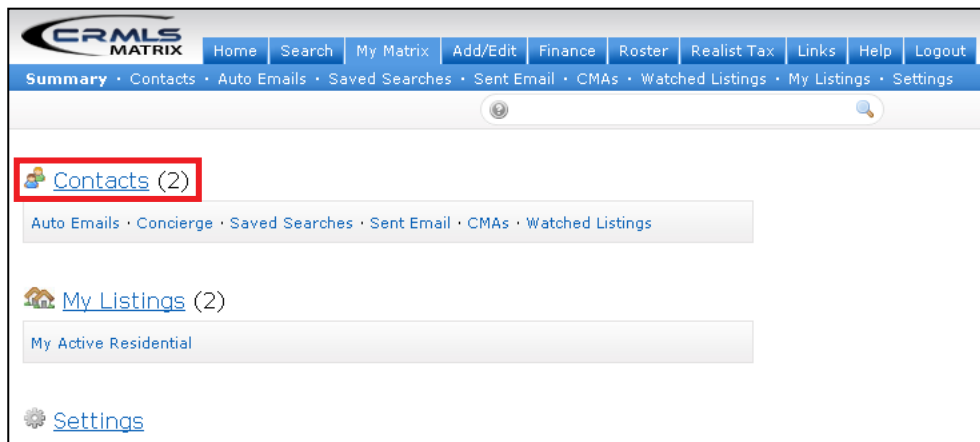
Follow the steps in these sections to view emails that were sent to your client and to view your client's activity in the Client Portal.

- “Viewing Email History” below
- “Viewing Your Client’s Auto Email Portal” on page 42

Viewing Email History

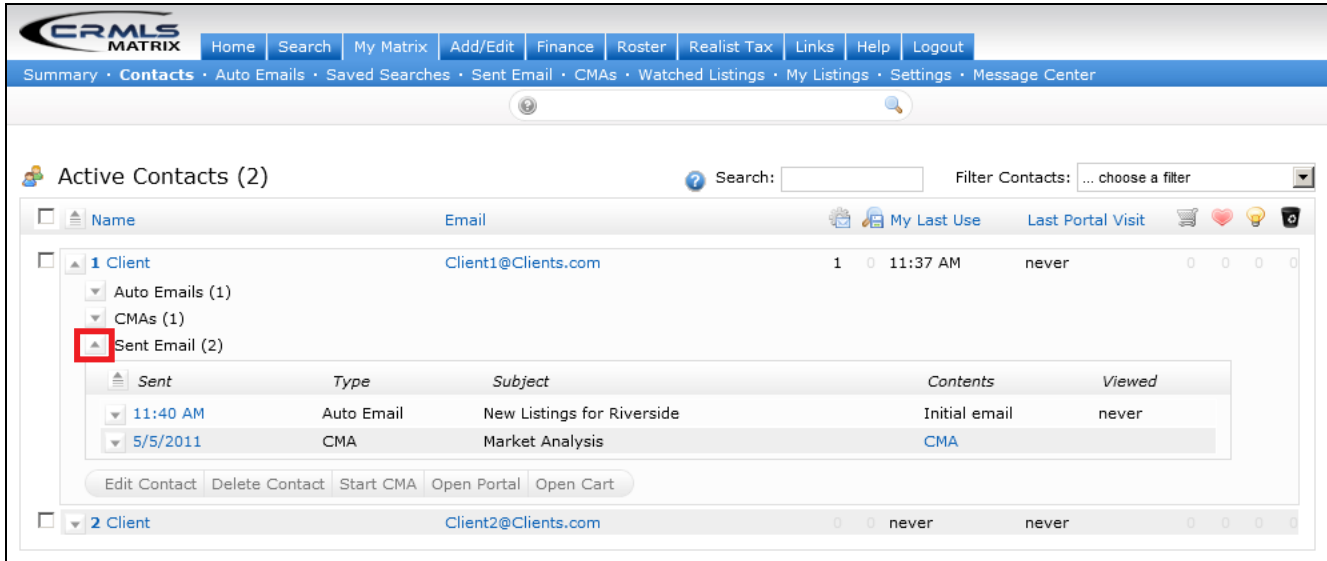
Follow the steps below to view sent email history.

1. From the My Matrix tab click the **Contacts** link.



2. Click the triangle next to a contact to expand the contact.

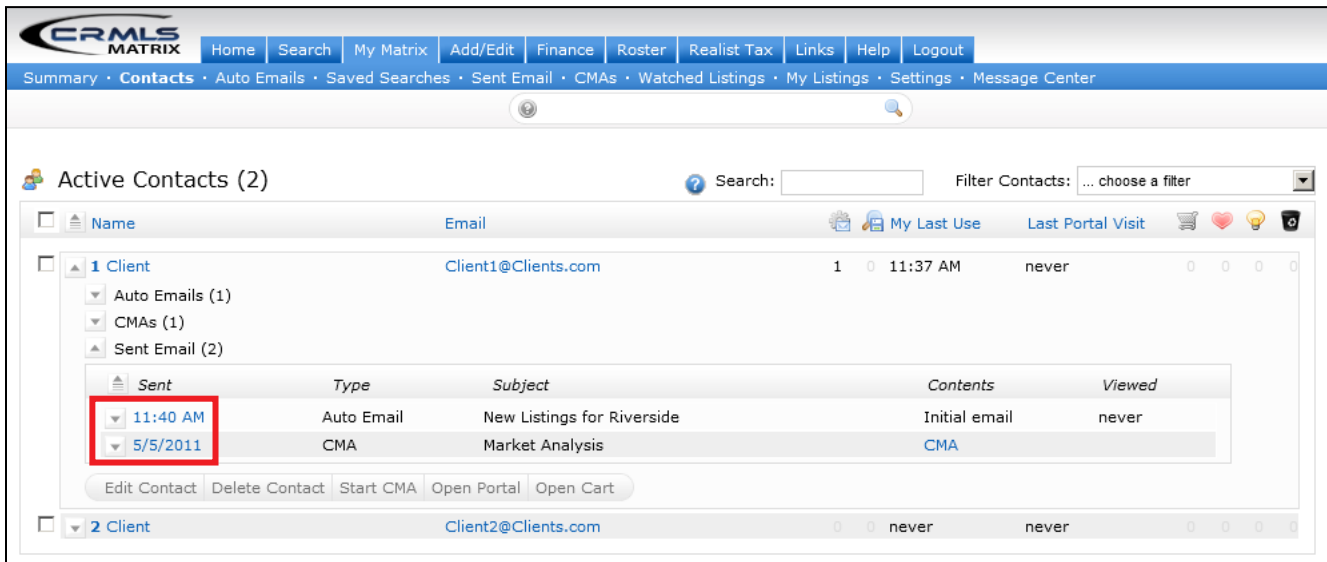
3. Click the triangle next to Sent Email to expand the email list.



Note:

- The Contents column gives you a total count of the number of listings sent.
- The Viewed column lets you know when the client viewed the email sent by CRMLS Matrix.
- If you sent an Auto Email to your client a status of Waiting Activation maybe listed. This means that your client has not opened your Auto Email. After your client clicks on the view listings link in their Email, the system will continue sending listings.

4. Click a date to view the email history information.



For a complete list of the types of emails and their definitions, refer to the table below:

Email Type	Description
Auto Emails	Emails sent using the Auto Email feature.
CMAs	Emails sent from the CMA Wizard.
Direct	Emails sent directly sent from a search results page.
Directions	Emails sent from a Driving Directions page.
Publish	Emails sent using the Auto Email feature with Concierge mode enabled.
Reports	Email reports sent directly from a search results page.
Stats	Emails sent from a Statstic Chart page.

Viewing Your Client's Auto Email Portal

Your customers have the ability to interact with their emails and auto emails using their own Client Portal. This feature allows your clients to select listings as their Favorites, Possibilities, and Discard unwanted properties.

Create an Email or Auto Mail for your client and an email will be sent to your client. Your client will receive an email with a link to their client portal.

From the client portal, your client can view listings on a Map, mark listings as Favorites, Possibilities, or Discard properties.

This report prepared for you by [Christopher Reinhart](#)

Start Auto Email Favorites (3) Possibilities (2) Discarded (1) Help

Auto Email: Listings for Leases.

Results 1-8 of 8 [Filter Results >>](#)

Previous · Next · [1] · [Bottom](#)

<input type="checkbox"/>	<input type="checkbox"/>	Received ML#	S	St#	Street Name	City	Ar	TG#	L/Used Price	CDOM	Bdr/Ba	Sqft
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/13/2010P752040	A	3026	ASSOCIATED RD #94	FUL	83	739C2	\$1,400		2 / 2	853
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/11/2010P745772	A	2719	PINE CREEK CR	FUL	83	739D2	\$1,395		2 / 2	990
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/5/2010 P723932	A	2600 W	PORTER AV	FUL	83	768B1	\$1,200		2 / 2	1,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/5/2010 P750852	A	1665	BREA BL #239	FUL	83	738H5	\$1,350		2 / 1	955
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/5/2010 P754121	A	2380 W	ORANGETHORPE AV #39	FUL	83	768C2	\$1,500		2 / 2	1,160
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/5/2010 P754477	A	925	TAFOLLA ST	PLA	84	769E1	\$1,195		2 / 1	800
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/5/2010 R1006534	A	318	WILMA CR #D	PLA	84	740B7	\$1,295		2 / 2	1,100
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/5/2010 S626893	A	1525	SPRUCE ST #A	PLA	84	739J7	\$1,450		2 / 2	995

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[Print](#) [Email](#) [Map](#) [Mark as Read](#) [Add to Favorites](#) [Add to Possibilities](#) [Discard](#)

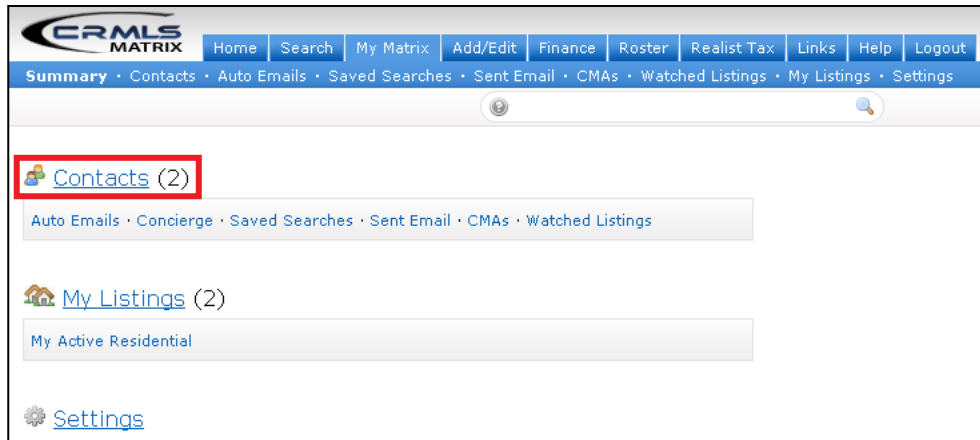
Display: at per page.

Note:

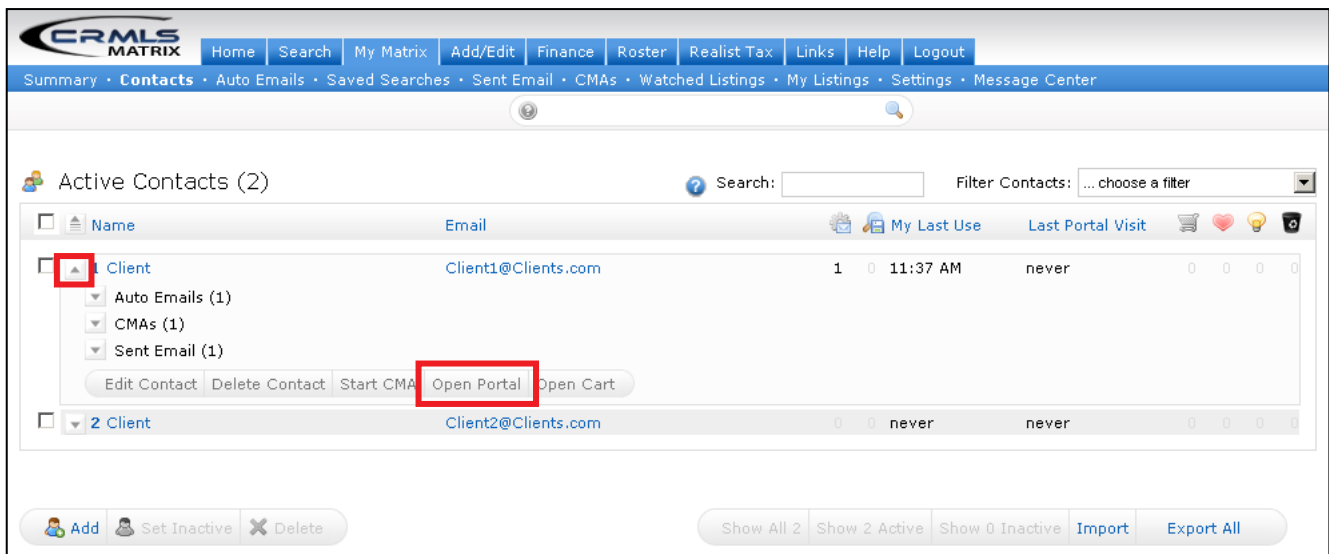
Listings that have been set into Favorites, Possibilities and Discarded will be saved and can be retrieved each time your client opens their Portal.

Follow the steps below to view your client's Favorite, Possible, and Discarded properties.

1. From the My Matrix tab click the **Contacts** link.



2. Click the triangle next to a contact to expand the contact.
3. Click the **Open Portal** button to view your client's Favorites, Possibilities, and Discarded listings.



Note:

From the client portal, you can add listings to the Favorites, Possibilities, and Discarded listings folders for your client.

Anti Spam Feature

All emails sent through the CRMLS Matrix Platform have an unsubscribe link allowing recipients the ability to unsubscribe from receiving additional emails from the CRMLS Matrix Platform. There are different unsubscribe options available that your client can choose from when they receive Direct or Auto Email. The benefit of this feature is that you will be notified if the member has marked your email as spam.

Unsubscribe from Direct Emails

Direct emails are Listing or CMAs that have been sent to your client by clicking on the email button within the CRMLS Matrix Platform. If your client chooses to opt out of these emails they can use the Unsubscribe link.

Welcome to "The Portal"

All messages I send to you containing MLS® listing information - those I send you manually as well as those I set our system to send you automatically - will contain a link to your personalized page on The Portal. You can access The Portal with your favorite web browser, where you'll be able to view the MLS® listing information I've prepared for you in several different formats. For your convenience, you'll be able to sort these listings and categorize them. You'll be able to see all associated photographs. And you'll be able to see them on a pinned on a map, a high-level aerial photograph or a low-level "Bird's Eye" photograph.

I hope you enjoy working with The Portal and would be happy to hear your feedback. In the meantime, please click on the link below to begin your Portal experience.

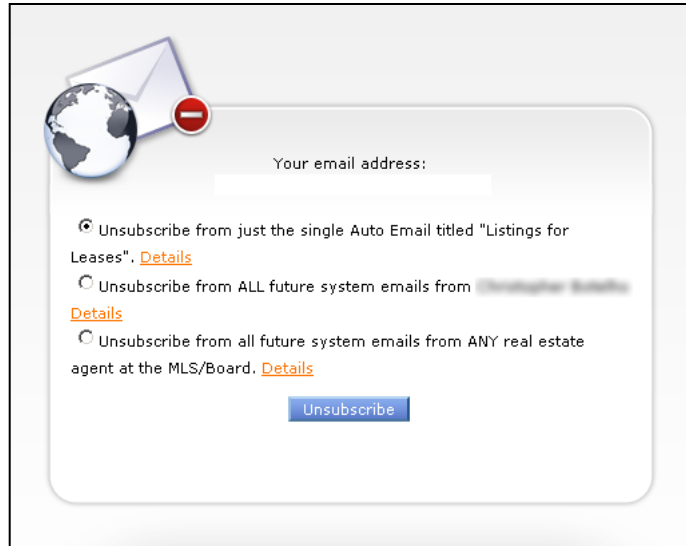
Click the following link to view ALL property listings
<http://www.mrmlsmatrix.com/DAE.asp?ID=61392049-680133871-50>

Christopher Botelho

Note: The Web link above will expire 30 days after the date of this email.

Click this link if you wish to Unsubscribe:
<http://www.mrmlsmatrix.com/UAE.asp?ID=0-680133871-00&Eml=Y2Fzc2FuZlJhYm90ZWxob0BnbWpC5jb20%3d>

When your client clicks the Unsubscribe link, they see a window like this one:



From the Unsubscribe window, your client can select the following options:

- Unsubscribe from a single direct or auto email
- Unsubscribe from all emails from the real estate agent that sent the email
- Unsubscribe from all emails from ALL CRMLS real estate agents

Agent Notification

If your client unsubscribed from an email, marked it as spam, or disabled an email, you will receive an email notifying you that your client has unsubscribed. You can assist your client if they unsubscribed by mistake.

How to Re-subscribe to Direct or Auto Email:

1. If your client has unsubscribe by clicking the unsubscribe link in their email. They can re-subscribe by sending an email to OptIn@MRMLSmatrix.com from the email address they unsubscribed from.

Re-subscribing will remove all blocks assigned to that recipient and allow the recipient to receive email through Matrix again. This email can be left blank, no subject or body text required.

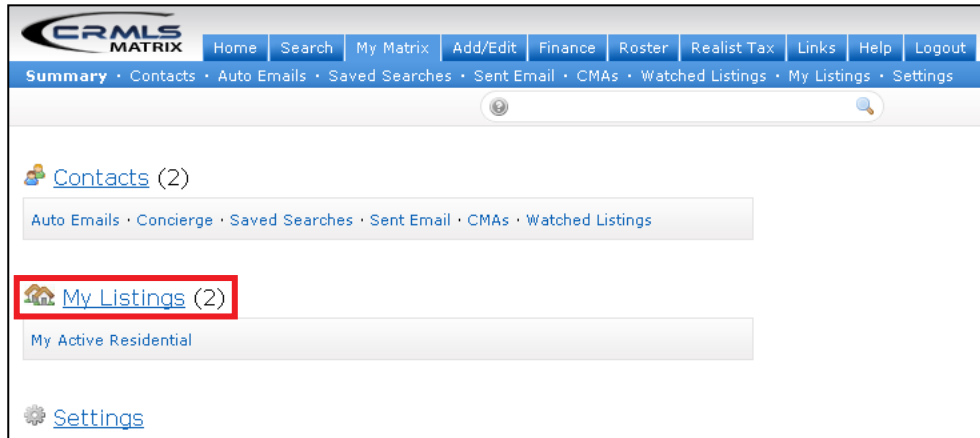
2. If your client accidentally has marked an email as spam through their email provider (such as AOL, MSN, Hotmail) re-subscribing might not be enough. The clients need to notify their email provider that they want to receive future emails from CRMLS Matrix. The following links under ISP Specific Help will direct clients what steps to take.

Yahoo New: <http://help.yahoo.com/l/us/yahoo/mail/yahoomail/abuse/>

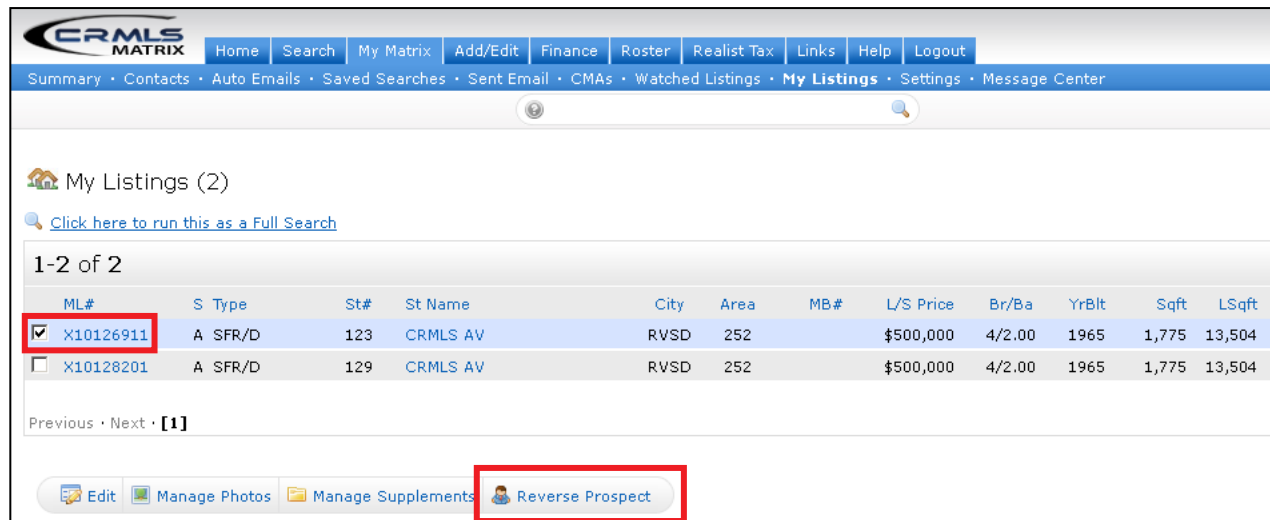
Reverse Prospecting

Reverse Prospecting allows you to see how many agents have sent your listing as part of an Auto Email. Follow the steps below to get started.

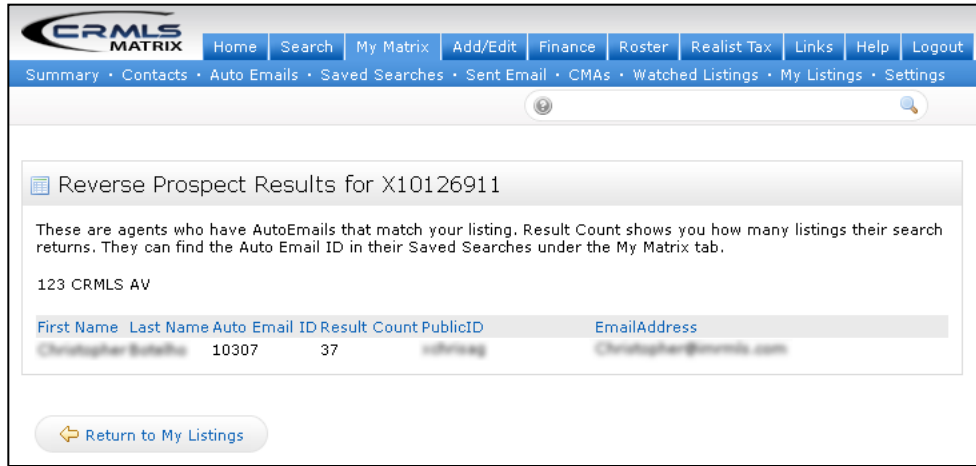
1. From the My Matrix tab click the **My Listings** link.



2. Click the checkbox next to a listing that you would like to Reverse Prospect.
3. Click the **Reverse Prospect** button.



4. The reverse prospects will show the first and last names of the agents who auto emailed your listing. It will also show the Auto Email ID, Results Count, Public ID and Email address of the agent that had an auto email that send your listing to a client.



CRMLS MATRIX

Home Search My Matrix Add/Edit Finance Roster Realist Tax Links Help Logout

Summary Contacts Auto Emails Saved Searches Sent Email CMAs Watched Listings My Listings Settings

Reverse Prospect Results for X10126911

These are agents who have AutoEmails that match your listing. Result Count shows you how many listings their search returns. They can find the Auto Email ID in their Saved Searches under the My Matrix tab.

123 CRMLS AV

First Name	Last Name	Auto Email ID	Result Count	PublicID	EmailAddress
Christopher	Baile	10307	37	cd10307	Christopher@crmls.com

[Return to My Listings](#)

Note:

The Results Count is the number of listings that were auto emailed by the agent. Your listing is one of the listings in the results count (lower result counts are better, meaning your listing is one of a fewer number of listings that match the search criteria for a client).

Carts

The CRMLS Matrix Platform allows you to keep particular listings in a Carts for quick access. Listings that you add to a Cart will remain in the cart regardless of changes/modifications the listings go through. The CRMLS Matrix Platform also allows you and your clients to have individual Cross-Property Carts to store listings in while viewing search results. You can then view your client's Carts and quickly print listing reports or email the listings to your clients. Refer to these sections to manage client Carts:

- “Adding Listings to a Cart” below
- “Accessing Carts” on page 50
- “Removing Listings from Carts” on page 53

Adding Listings to a Cart

Follow the steps below to add listings to a Cart. Before you begin, make sure that you've performed a search and are at the search results page.

1. Click the checkbox next to each listing you want to add to a Cart.
2. Click the **Carts** button to expand the Carts button bar.

The screenshot shows the CRMLS Matrix Platform interface. At the top, there is a navigation bar with links: Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, Logout. Below this is a search bar containing 'a sfr pomona \$250000-275000'. The main content area displays a table of search results with 5 items. The first three items have their checkboxes checked. A red box highlights the checkboxes for the first three items. At the bottom right of the table area, a 'Carts' button is highlighted with a red box. Below the table, there are buttons for 'Revise', 'Email', 'Report', 'CMA', 'Map', 'Stats', and 'Save As'. At the bottom right, there are buttons for 'Narrow', 'Discard', 'Un-Discard', and 'Export'.

ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM	V	P	SOC	
<input checked="" type="checkbox"/>	H10123866	A SFR/D	41	Calle Del Mar	POM	687	\$259,000 ↓	2/3.00	1988/7	1,345	3,354	6/6	Y	Y	3.000*	
<input checked="" type="checkbox"/>	C08150291	A SFR/D	1593	Carol DR	POM	687	601D6	\$260,000	4/2.00			774/774	N	Y	3.000	
<input checked="" type="checkbox"/>	C10105034	A SFR/D	2242	Kellogg Park DR	POM	687	640D1	\$261,000 ↑	3/2.00	1952	1,411	6,229	60/158	Y	N	2.500
<input type="checkbox"/>	C10085171	A SFR/D	752	Fairfax LN	POM	687	641A4	\$262,900 ↓	4/2.00	1963	1,416	7,357	113/113	N	N	2.500
<input type="checkbox"/>	C10105016	A SFR/D	1602	Regene ST	POM	687	641A4	\$262,900	4/2.00	1963	1,416	6,077	60/60	N	Y	2.500

Note:

After you click the Carts button, the Carts button bar stays expanded until you log out of the CRMLS Matrix Platform.

3. Do one of the following:

- Select **My Residential** in the drop-down menu to add the listings to your agent cart.
- Select a client's cart in the drop-down menu to add the listings to your client's cart.

The screenshot shows the CRMLS Matrix interface. At the top, there is a navigation bar with links: Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, Logout. Below this is a search bar containing 'a sfr pomona \$250000-275000'. The main content area is titled 'Residential - Detail' and shows 'Original Results' for '1-5 of 5' listings. A table of properties is displayed with columns: ML#, S Type, St#, St Name, City, Area, MB#, L/S Price, Br/Ba, YrBltd, Sqft, LSqft, DOM/CDOM, V, P, SOC. Three listings are checked: H10123866 (Calle Del Mar), C08150291 (Carol DR), and C10105034 (Kellogg Park DR). At the bottom right, there is an 'Add to' button with a dropdown menu. The dropdown menu is open, showing options: 'Cart: My Residential (2)', 'Cart: My Residential (2)', 'Cart: 1, Client (5)', and 'Cart: 2, Client (3)'. The 'Add to' button and the dropdown menu are highlighted with a red box.

Note:

If you have a large number of clients, you may need to select -- **more (click)** -- to display additional clients.

4. Click the **Add to** button to add the selected listings to the selected Cart.

The screenshot shows the CRMLS Matrix interface after the listings have been added to the cart. A yellow confirmation message at the top right reads: 'Added 2 Listings to Client 1's Cart; 1 already there'. The table of properties is the same as in the previous screenshot. At the bottom right, the 'Add to' button is now highlighted with a red box. The dropdown menu is still open, showing the selected option: 'Cart: 1, Client (5)'. Other buttons like 'Open', 'Narrow', 'Discard', 'Un-Discard', and 'Export' are also visible.

When the listings have been added to the Cart, you see a confirmation message at the top of the screen. If the Cart already contains one of the listings you selected, you'll see a message similar to the one above.

Note:

To add the same listings to another Cart, select a different Cart in the drop-down menu on the Carts button bar. Then click the **Add to** button to add the listings to the Cart you selected.

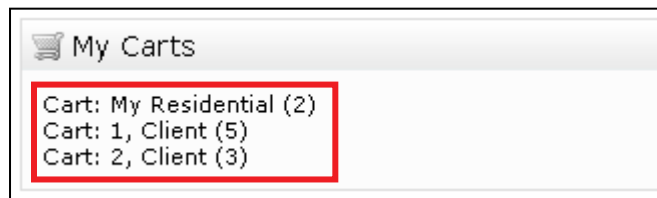
Accessing Carts

The CRMLS Matrix Platform provides you with multiple ways to access your Carts. Refer to these sections to access your Carts:

- “Accessing a Cart from the Home Tab” below
- “Accessing a Cart from the Search tab” below
- “Accessing a Cart from the Search Results Page” on page 51
- “Accessing a Cart from the My Matrix Contacts Page” on page 52

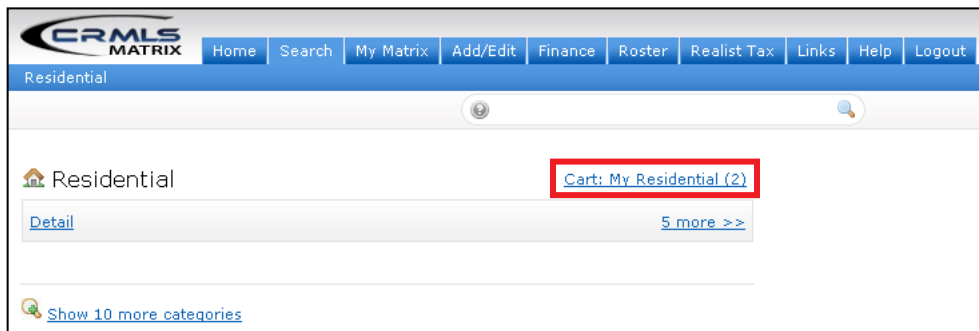
Accessing a Cart from the Home Tab

To access a Cart from the Home tab, click the Cart link in the My Carts widget.



Accessing a Cart from the Search tab

1. Click the **Search** tab.
2. Click the Cart link to open the corresponding Cart for that Property Type.



Accessing a Cart from the Search Results Page

- From the search results page, click the **Carts** button to expand the Carts button bar, if necessary.

Residential · Detail

a sfr pomona \$250000-275000

1-5 of 5 · Checked 3 · [Check all 5](#) Display Agent 1 Line at 25 per page · View as

ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM	V	P	SOC
<input checked="" type="checkbox"/>	H10123866	A SFR/D	41	Calle Del Mar	POM	687	\$259,000 ↓	2/3.00	1988/7	1,345	3,354	6/6	Y	Y	3.000*
<input checked="" type="checkbox"/>	C08150291	A SFR/D	1593	Carol DR	POM	687	601D6	4/2.00				774/774	N	Y	3.000
<input checked="" type="checkbox"/>	C10105034	A SFR/D	2242	Kellogg Park DR	POM	687	640D1	3/2.00	1952	1,411	6,229	60/158	Y	N	2.500
<input type="checkbox"/>	C10085171	A SFR/D	752	Fairfax LN	POM	687	641A4	4/2.00	1963	1,416	7,357	113/113	N	N	2.500
<input type="checkbox"/>	C10105016	A SFR/D	1602	Regene ST	POM	687	641A4	4/2.00	1963	1,416	6,077	60/60	N	Y	2.500

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Revised Email Report CMA Map Stats Save As

Narrow Discard Un-Discard Export

Carts

- Select the Cart you want to view from the drop-down menu.

Original Results

1-5 of 5 · Checked 3 · [Check all 5](#) Display Agent 1 Line at 25 per page · View as

ML#	S Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM	V	P	SOC
<input checked="" type="checkbox"/>	H10123866	A SFR/D	41	Calle Del Mar	POM	687	\$259,000 ↓	2/3.00	1988/7	1,345	3,354	6/6	Y	Y	3.000*
<input checked="" type="checkbox"/>	C08150291	A SFR/D	1593	Carol DR	POM	687	601D6	4/2.00				774/774	N	Y	3.000
<input checked="" type="checkbox"/>	C10105034	A SFR/D	2242	Kellogg Park DR	POM	687	640D1	3/2.00	1952	1,411	6,229	60/158	Y	N	2.500
<input type="checkbox"/>	C10085171	A SFR/D	752	Fairfax LN	POM	687	641A4	4/2.00	1963	1,416	7,357	113/113	N	N	2.500
<input type="checkbox"/>	C10105016	A SFR/D	1602	Regene ST	POM	687	641A4	4/2.00	1963	1,416	6,077	60/60	N	Y	2.500

Previous · Next · [1] · [Top](#) · [Bottom](#)

Revised Email Report CMA Map Stats Save As

Add to Open

Narrow

Cart: My Residential (2)
 Cart: My Residential (2)
 Cart: 1, Client (5)
 Cart: 2, Client (3)

Note:

If you have a large number of clients, you may need to select -- more (click) -- to display additional clients.

3. Click the **Open** button on the Carts button bar.

Original Results

1-5 of 5 · Checked 3 · [Check all 5](#) Display Agent 1 Line at 25 per page · View as

Previous · Next · [1]

<input type="checkbox"/>	ML#	S	Type	St#	St Name	City	Area	MB#	L/S Price	Br/Ba	YrBlt	Sqft	LSqft	DOM/CDOM	V	P	SOC
<input checked="" type="checkbox"/>	H10123866	A	SFR/D	41	Calle Del Mar	POM	687		\$259,000 ↓	2/3.00	1988//	1,345	3,354	6/6	Y	Y	3.000*
<input checked="" type="checkbox"/>	C08150291	A	SFR/D	1593	Carol DR	POM	687	601D6	\$260,000	4/2.00				774/774	N	Y	3.000
<input checked="" type="checkbox"/>	C10105034	A	SFR/D	2242	Kellogg Park DR	POM	687	640D1	\$261,000 ↑	3/2.00	1952	1,411	6,229	60/158	Y	N	2.500
<input type="checkbox"/>	C10085171	A	SFR/D	752	Fairfax LN	POM	687	641A4	\$262,900 ↓	4/2.00	1963	1,416	7,357	113/113	N	N	2.500
<input type="checkbox"/>	C10105016	A	SFR/D	1602	Regene ST	POM	687	641A4	\$262,900	4/2.00	1963	1,416	6,077	60/60	N	Y	2.500

Previous · Next · [1] · [Top](#) · [Bottom](#)

[+ Add to](#) [Open](#) Cart: 1, Client (5)

[Revise](#) [Email](#) [Report](#) [CMA](#) [Map](#) [Stats](#) [Save As](#) [Narrow](#) [Discard](#) [Un-Discard](#) [Export](#)

Accessing a Cart from the My Matrix Contacts Page

1. Click the **My Matrix** tab, then click the **Contacts** link.

CRMLS MATRIX

Home Search **My Matrix** Add/Edit Finance Roster Realist Tax Links Help Logout

Summary · **Contacts** · Auto Emails · Saved Searches · Sent Email · CMAs · Watched Listings · My Listings · Settings

Contacts 2

Auto Emails · Concierge · Saved Searches · Sent Email · CMAs · Watched Listings

My Listings 0

Number of Listings: 0

2. Click the number link in the Cart column for the client's Cart you want to view.

CRMLS MATRIX

Home Search My Matrix Add/Edit Finance Roster Realist Tax Links Help Logout

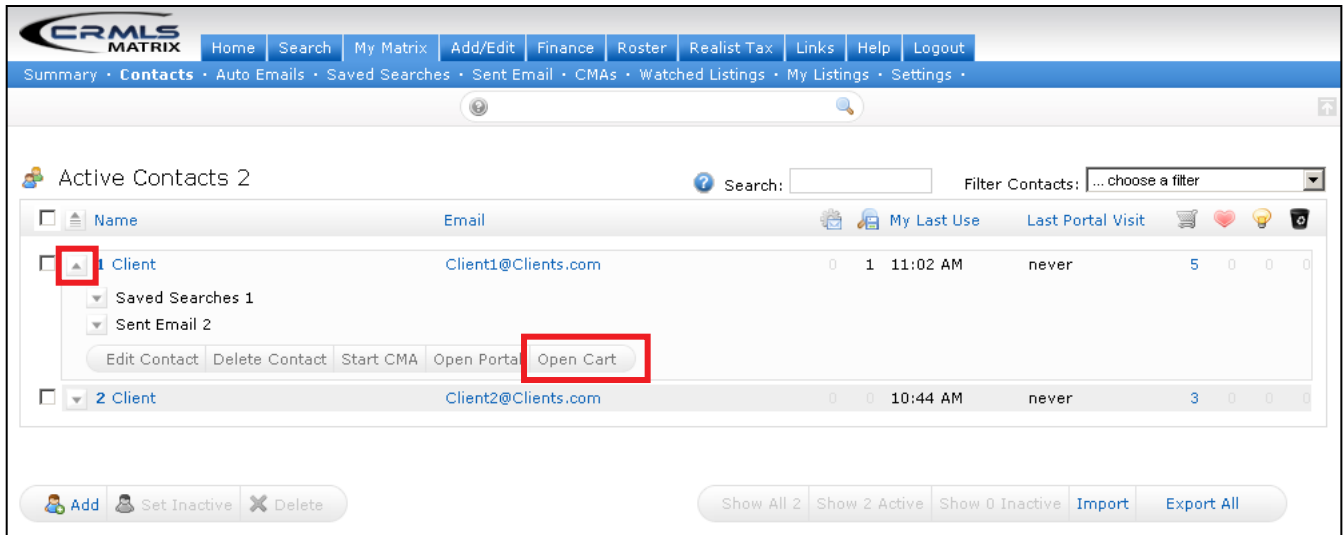
Summary · **Contacts** · Auto Emails · Saved Searches · Sent Email · CMAs · Watched Listings · My Listings · Settings

Active Contacts 2 Search: Filter Contacts: ... choose a filter

<input type="checkbox"/>	Name	Email			My Last Use	Last Portal Visit				
<input type="checkbox"/>	1 Client	Client1@Clients.com	0	1	11:02 AM	never	5	0	0	0
<input type="checkbox"/>	2 Client	Client2@Clients.com	0	0	10:44 AM	never	3	0	0	0

[Add](#) [Set Inactive](#) [Delete](#) [Show All 2](#) [Show 2 Active](#) [Show 0 Inactive](#) [Import](#) [Export All](#)

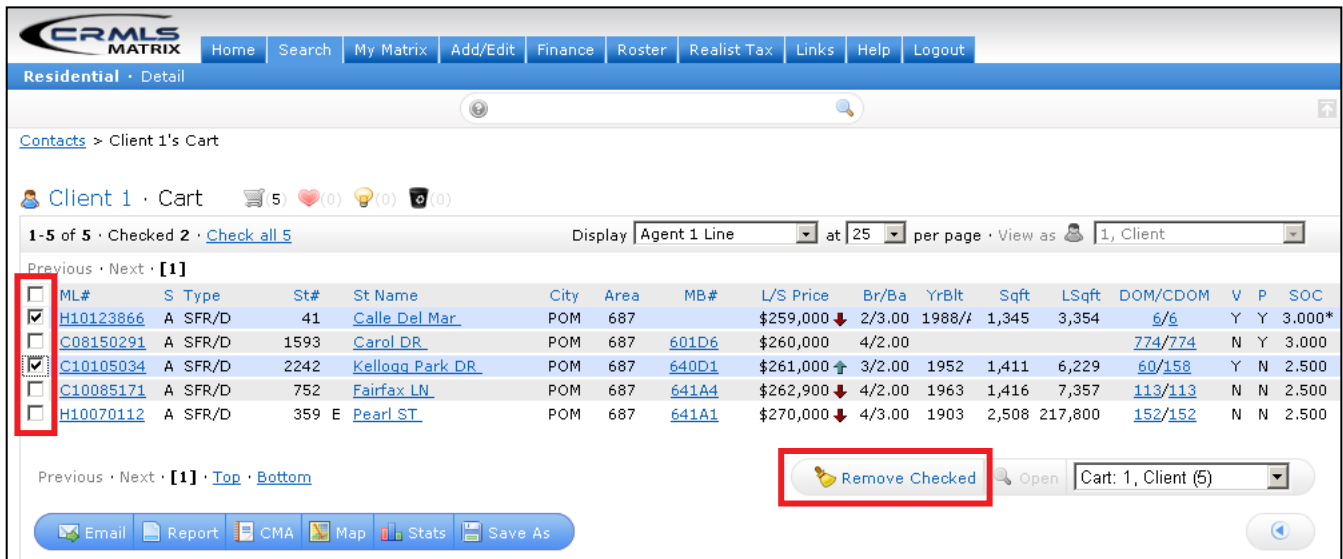
You can also click the arrow to view client details and click the **Open Cart** button.



Removing Listings from Carts

Follow the steps below to remove listings from a Cart.

1. Open the cart you want to remove listings from as described in “Accessing Carts” on page 50.
2. Click the checkbox next to each listing you want to remove from the Cart.
3. Click the **Remove Checked** button to remove the selected listings.



Note:

To quickly remove all listings in a Cart click **Check All** to select all of the listings in the Cart, then click the **Remove Checked** button.

Contacting CRMLS Customer Support

CRMLS takes pride in providing expert customer support to all of our members. Our technical support staff is prepared to assist you with any CRMLS Matrix Platform questions you may have, technical issues, or trouble shooting assistance.

To contact our technical support department, visit our website at <http://www.crmls.org> and click the **SUPPORT** button. Then click the **Submit Support Request or Suggestions** link to submit a support request or a suggestion (we value your suggestions).

The screenshot shows the CRMLS website interface. At the top, the CRMLS logo is displayed with the tagline 'CALIFORNIA REGIONAL MULTIPLE LISTING SERVICE, INC.' and a 'TECHNOLOGY' banner. Below the logo is a row of association logos. A navigation menu contains links for 'HOME', 'TRAINING', 'SUPPORT', 'NEWS', 'SERVICES', and 'CONTACT US', with 'SUPPORT' highlighted in a red box. On the left side, there are links for 'RULES AND POLICIES', 'ASSOCIATION CONTACTS', 'PUBLIC PROPERTY SEARCH', and 'RECIPROCAL USER INFO.', along with a 'System Login' dropdown and a 'Go' button. The main content area is titled 'SUPPORT' and features two blue boxes. The first box, 'CRMLS Members', contains a red-bordered link 'Submit Support Request or Suggestions'. The second box, 'Discover Members', also contains a red-bordered link 'Submit Support Request or Suggestions'. To the right is a 'DOWNLOAD CENTER' with a list of resources: Training Manuals, Training Videos, Multiple Listing Input Forms, Image Resizer, Link Generator, Smart Trac Participant / Vendor Enrollment, Fannie Mae Market Condition Addendum, DataMaster, Builder Tract Reference Tool, and CRMLS Mobile. Below these boxes, 'Support Hours' are listed: Monday-Friday 8:30am-9:00pm and Saturday & Sunday 10:00am-3:00pm. A note states: 'Note: If you are needing assistance with account changes or billing, please contact your Association. Click Here for Association Contacts'.

If you need immediate assistance, our customer support technicians are available to answer your questions Monday through Friday from 8:30 AM to 9:00 PM and on Saturday and Sunday from 10:00 AM to 3:00 PM.

Toll Free Number: **(800) 925-1525**

On the web: <http://www.crmls.org/support>