

**Add a Team**    **TEAM OWNER(4)**    TEAM MEMBER(1)    LOGIN AS(1)

- To add a team (for which you will be the team owner), click the large blue circle with the plus sign in the lower right of your screen.



**Important Note:** You may add as many teams as you like, however, only one team (with you as the team owner) may be enabled/active at one time.

- Team Name and Description.** Type in the name of your Team. This is what will appear on MLS reports when you or team members are working as the team. Optionally, you may also enter a description for the team.

Team Name

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Description

Enter Description here

- Type.** Select whether you want your team members to work as the team in Add/Edit, Matrix or both.

Type



- In Matrix.** Select whether you, as the team owner, will Impersonate or Work on Behalf of the Team.

**Impersonate:** Emails you send from Matrix will be sent from your name and email address, and will use your email header and footer (if you have chosen them), and your email signature. If you click the checkbox to allow team members the choice of switching between their own name and the team name, then you will also have that option. Any reports you print will have your information in the “Courtesy of” section.

In Matrix

I, the Team Owner, Impersonate this Team (i)

I, the Team Owner, Work on Behalf of this Team (i)

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

**Work on Behalf:** Emails you send from Matrix would be sent from “On behalf of (team name),” with your email

header/footer and email signature. As with Impersonate, any reports you print will have your information in the “Courtesy of” section. With this setting, you do not have the option to allow team members to switch between their own name and the team name.

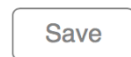
- Add Team Members:** In the Team Members section, click the small blue circle with the plus sign at the right side of the section header banner.

**Team Members** +

Please select the blue "+" sign in the top right corner to add team members.

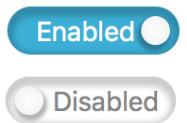
- a. Start typing the team member's name or NRDS ID and select the person's name as it appears in the drop-down.
- b. Select whether they will Impersonate or Work on Behalf of the team.
- c. Select whether the team member may edit team listings in Add/Edit (team member must have at least Agent-Edit or Agent-Edit-Limited permissions assigned by broker).
- d. Click the blue Save button in the upper right corner of the screen.
- e. Repeat process for each team member you want to add.

6. **Save Team.** Click the "Save" button in the upper right corner of the screen.



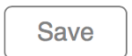
### **Enable/Disable a Team**

Whenever you add a new team, it is automatically enabled. You may enable and disable teams on the Team Owner summary screen. Each of your teams has a team "card" on the summary screen that shows the team name, description and number of members. On the right side of these cards is a slider control for Enabled/Disabled. Click on this to switch back and forth between Enabled and Disabled. You may have only one team enabled at a time. So, if you have a team enabled and want to enable another one, you first must disable the currently enabled team.



### **Edit a Team**

1. To edit a team, it must be enabled. If the team you want to edit is Disabled, change it to Enabled.
2. Click on the Team summary "card" on the Team Owner screen. This will open the Edit window.
3. Make whatever changes you want. To delete a team member, click the trash can icon on the right side of their row. 🗑️
4. After completing your changes, click the Save button in the upper right corner.



### **Team Member** TEAM OWNER(4) TEAM MEMBER(1) LOGIN AS(1)

The "Team Member" screen shows all the teams another NorthstarMLS subscriber has assigned you to. You can view who else is on your team, whether you can edit team listings, and whether you Impersonate or Work on Behalf of the team. If you have any questions about your membership of a team, contact the Team Owner. They have a blue star next to their name. ★

## **Login As**    TEAM OWNER(4)    TEAM MEMBER(1)    **LOGIN AS(1)**

You may authorize other NorthstarMLS users to log in as you to the Add/Edit system and work on your behalf. This temporary permission lasts 30 days unless you remove it sooner or extend it. This is especially helpful when you plan to be away on vacation.

### **Assign Login**

Click the large blue circle with the plus sign in the lower right of your screen. Start typing the agent's name or NRDS ID in the box provided. When you see the person you want in the dropdown, make the selection. Click the blue Save button in the upper right corner.



### **Extend Login**

To extend a login as permission beyond the first 30 days, click the box/arrow icon on the person's card on the summary screen. Click the Confirm button. This will extend the login as period to 30 days from today's date.



### **Remove Login**

To remove the login as permission you have assigned to a person, click the trash can icon in the upper right of their card on the Login As summary screen. Click the Confirm button.



## **Offices**    TEAM OWNER(1)    TEAM MEMBER(0)    **OFFICES(67)**    LOGIN AS(1)

If you have Head Broker or Office Broker Permissions, then you have an additional "Offices" function. This is where Head Brokers can assign those with Office Broker Permissions to work in Add/Edit for additional offices in your firm other than their primary office. For Office Brokers, this section is read-only where you can see what other offices you have been assigned to.

The following capabilities are available to Head Brokers:

### **Assign other offices to an Office Broker**

Click the large blue circle with the plus sign in the lower right of your screen. Start typing the agent's name or NRDS ID in the box provided. When you see the person you want in the dropdown, make the selection. In the "Offices" section, click to select all the offices in your firm that you want this individual to be able to provide Add/Edit system support. Click the blue Save button in the upper right corner. If you want to add all of the other offices in your firm to this individual, click the "Select all" box at the top of the list.



### **Edit an Office Broker's Office Assignments**

On the summary screen, there is a "card" for each Office Broker in your firm that you have assigned to other offices. The large blue number on the left indicates how many offices you have them assigned to support. To make any changes, click on the

individual's card, make your changes and then click the blue Save button in the upper right corner. If you want to remove all of their other office assignments, click the "Deselect all" box at the top of the list.

### **Getting Help**

If you have questions not covered in this guide, you may contact our Help Desk M-F, 8:00 to 5:00 at [help@northstarmls.com](mailto:help@northstarmls.com) or 651-251-5456 (1-877-251-5455 toll free).