Contacts

To add or revise a Contact:

1. Click the "My Matrix" tab.
2. Click the "Contacts" link.
3. Click the **Add** button. (To revise a Contact, click the triangle to the left of the Contact's name and then click the **Edit Contact** button.)
4. Fill in as many fields as you wish. Be sure to fill in the email address field so that you can email listings to the client.
5. Click the **Save** button.

To delete or inactivate a Contact:

1. Click the "My Matrix" tab.
2. Click the "Contacts" link.
3. Click to place a check mark in the select box next to the Contact you want to delete or inactivate.
4. Click the **Delete** or **Set Inactive** button.
5. Click **OK** to confirm (if deleting).

Tax

How do I search the Tax records?

1. Click the "Tax" tab and select "Public Record Search."
2. Complete whatever criteria you want to search on the search form. We recommend including County in your search.
3. To search other fields not shown, click the Additional Fields "Add/Remove" link at the bottom of the screen for the full list.
4. Press the Enter key or click the **Results** button to run your search.

How do I create and print mailing labels?

1. Conduct a Public Records Tax search as described above.
2. Click the "All" link at the top of the screen to select all your results.
3. Below the search results, click **Print** button.
4. Choose a label type from the list on the left. Click the **Print to PDF** button.
5. A new tab/window will open with your formatted labels. You may save this to your computer and/or send to your printer.

Main Navigation Tabs

Home	View News, run Hot Sheets, access tools and programs.
Search	Find listings that match your client's criteria. Save searches and set-up auto-emails for your clients. Print and email listing reports and CMAs. View and print statistics and maps.
My Matrix	This is where you can track and maintain everything customized to you and your clients. Update and run saved searches. View your Active and off-market listings. Track views. Set-up and edit your Contacts. View your email history. Manage your personal information and saved CMAs.
Finance	A variety of financial calculators.
Roster	Find contact information for other agents and offices.
Tax	Public Tax Records Search.
Stats	Run Market Statistics.
Add/Edit	Add/Edit listings, photos, supplements, open houses.
Help	References and help for common tasks.

To log out of Matrix, click the **Log Out** link to the right of the Help tab.

NorthstarMLS
For your Information. For your Success.

Matrix Quick Reference Guide

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https://www.northstarmls.com
(Click the **Matrix Login** button on the right side of the screen.)

To log on:

Type your NRDS ID number in the **NRDS ID** box. Type your password in the **Password** box. Click the **Login** button or press the **Enter** key on your keyboard.

For NRDS ID help, click the "What is my NRDS ID?" link on the login screen. If you forget your password, click the "I Forgot My Password" link on the login screen.

HELP DESK:
For help using NorthstarMLS, email help@northstarmls.com or call 651-251-5456 (or toll free at **1-877-251-5455**) during business hours M-F, 8:00-5:00.

Search

How do I?	By doing this…
Start a search?	Mouseover the **Search** tab, then your desired **Property Type**. Select any of the available searches.
Select County, Municipality, Postal City or School District?	If you know the codes, type them into the input box, or you can start typing the full name and select the code from the list (narrows to your selection as you type).
Find specific MLS Numbers?	Type in the MLS # in the speed bar search box (directly below the menu tabs on any screen), then press the Enter key. Separate multiple MLS Numbers with commas, no spaces.
Enter number fields (Bedrooms, List Price, etc.)?	**3**…….Exactly 3 bedrooms **3-5**…3 to 5 bedrooms **3+**….3 or more bedrooms **3-**…..3 or fewer bedrooms For Price, enter number only (no dollar signs or commas). For example, enter 200-300 for listings priced at $200,000 to $300,000.
Enter dates? (mm/dd/yy)	**10/31/18**…………..for exact date **10/31/18-11/15/18**..for date range **10/31/18+**…everything since date **0-5**……..5 days back from today
Define a custom search area using the map?	Click the **Map** tab in the upper right of your search screen. Zoom the map using the map controls or **Jump to** drop down box (includes Address). Click on a shape button and drag your cursor to draw. Go back to the **Criteria** tab to enter the rest of your search criteria and run the search.
Add search fields I use frequently?	Click the **Add/Remove** link below the search fields. In the Available Fields box, click on a field you want to add, then click the **Add** button (or simply double click the field). Repeat as needed. Click the **UP** and **DOWN** buttons to rearrange the order. When finished, click the **Back** button.
Find and run recent searches?	Click the **Recent Searches** drop-down box at the upper right of any screen.

Search Results (Single Line Grid)

How do I?	By doing this…
Check down payment assistance?	Click the icon to check potentially available down payment assistance.
View photo(s)?	Click the icon.
View a map?	Click the icon.
View history?	Click the icon.
View virtual tour?	Click the icon.
View the Property Full Display?	Click the MLS Number link. Use the **Display** drop down box at top of page to choose other displays.
Sort differently?	For a quick single field sort, simply click the column header (once for ascending order, again for descending). For multi-field sorts (if you have 500 or fewer results), Click **Refine** above the button bar, then click the **Sort** button. Use the **Add** button to add fields from the left to your sort. Use the **Remove** button to remove fields from your sort on the right.
Narrow my results?	Select the listings you want to keep. Click **Refine** above the button bar. Click the **Narrow** button to remove all non-selected listings. Alternately, click the **Discard** button to remove all selected listings.
Save my search?	Click **Save** above the button bar. Click the **New Saved Search** button. Enter a Search name. If saving for specific client, select in the Contact drop-down list. Click the **Save** button. You will find your saved searches under the **My Matrix** tab.
Customize the single line grid?	Click the grey area around any column header to get a pop-up box with customization options.
Revise my search?	Click the Actions **Criteria** button or **Criteria** tab. Make desired changes and click **Results**.

Printing

1. Select the listing(s) you want to print.
2. Click the Actions **Print** button.
3. Select the report(s) you want.
4. For reports above the “PDF Only” line, select any of the options you want to the right of the reports list. Click either the **Print to PDF** or the **Print** (straight to printer) button. **Preview** and **Email** buttons also available.

Emailing

To manually email one or more listings:

1. Select the listing(s) you want to email.
2. Click the Actions **Email** button.
3. Click the **To:** button to select a Contact, or type an email address in the **To** box. Use commas to separate multiple email addresses.
4. If you want a copy sent to you, click to check the **Bcc me a copy of this message** box.
5. Click the **Preview** button to see a preview of what it will look like for your recipient.
6. Type in your subject and message.
7. Click the **Send** button.

To set up a client for Auto Email:

1. Create and execute a Search for your client.
2. Click **Save** above the button bar. Click the **New Auto Email** button. Select your client from the **Contact** drop-down list (or click the Create a New Contact link).
3. If you want copies sent to you, click to check the **BCC me a copy of all emails** box.
4. Type in the Subject and both the Welcome Email and Recurring Email messages.
5. If you want to review and approve listings before they are emailed, click to check the **Enable concierge mode** box.
6. Set the schedule for how frequently you want this client to receive new/revised listings.
7. Click the **Save** button.

To disable Auto Email for a client:

1. Click the **My Matrix** tab and select **Auto Emails** from the drop-down menu.
2. Select the Auto Email(s) you want to disable.
3. Click the **Disable** button.
4. Click the **OK** button to confirm.

To re-subscribe a client to your emails:
If your client has unsubscribed to your emails sent through Matrix and wants to resubscribe, have the client send a blank email to optin@northstarmls.com. They should receive a confirmation email within 10 minutes. (**Note:** Yahoo email addresses cannot be resubscribed.)