



To-Do List for the NorthstarMLS Matrix Update

IMPORTANT: Ensure you are on the new Matrix website for completing your action items: <https://matrix.commodataplatform.com>

- **License Agreement:** When you log in to the updated system for the first time, you will need to re-accept the system [License Agreement](#). We have not made any changes to this agreement since the last time you accepted it. The system update simply kicks off the requirement to Agree to it again.

- **My Information:** Click the utility drop-down menu at the far right of the screen (next to “Hello, [your name]”), and select “Settings.” On the Settings screen, click on “My Information” (upper left portion of the screen). Within My Information, setup each of these:
 - Click on the “Email Signature” tab and set your email signature for all emails you send out through Matrix.
 - Click on the “Header & Footer” tab. If you want a header and/or footer to appear when you print reports from Matrix, this is where you set them up.
 - Click on the “CMA Cover Page” tab. Here is where you can customize the cover sheet that will be available for any CMA you create.
 - Click on the “OneHome” tab. Here is where you enter all your personal information that will appear in your clients’ OneHome listings portal.

- **Contacts:** From the Matrix main menu, hover over “My Matrix” and click on “Contacts”
 - For all your Contacts **that contain a valid email address**, they were automatically moved over to the updated Matrix system. Check to ensure they are all present and information complete, especially your Active ones. Update as needed.

- **OneHome Client Portal:** As you reactivate your auto-emails in the updated system (see next action item below), tell your clients you have upgraded them to the improved OneHome Client Portal.
 - Clients will automatically receive the new OneHome client portal link by email when you **reactivate** their Auto-Email(s) in the updated Matrix system.
 - There is a new option for your clients to register their client portal and set a password. This is optional for them, but highly recommended to gain the full functionality.

- Clients' Favorites, Discards and any Notes they created in the previous Client Portal **will** convert over to OneHome (they need to register and be logged in to be able to see them and continue to mark more Favorites). All "Possibility" designations **will not** convert over to OneHome as that category has been removed due to low usage.
 - This is a link to a OneHome introductory video you can share with your clients:
<https://share.vidyard.com/watch/uz1VopQ7mBpodgPy21UPTS>
- **Check Saved Searches and Turn on Auto-Emails:** From the Matrix main menu, hover over "My Matrix" and click on "Saved Searches"
- Searches where we have added a * in the name should be reviewed as it indicates there was some criteria that had to be adjusted or could not transfer. Your converted Saved Searches that were not auto-emails have **(ImportedSS)** added to the front of the name.
 - All your Auto-Emails have transferred over as Saved Searches (because they are not activated for Auto-Email). Therefore, you will find them under My Matrix>>Saved Searches, not My Matrix>>Auto-Emails. These searches have **(ImportedAE)** added to the start of the name. Check your search Criteria and update as needed. To activate:
 - Click the name of the Saved Search and then the "Settings" button.
 - At the top of the screen, click the link "Turn this Saved Search into an Auto Email."
 - Adjust any settings you wish, and then click the "Save" button at the bottom. This will automatically generate anew Welcome email to your client with a OneHome client portal link.
 - **PLEASE NOTE:** If you are activating an auto-email in the updated system before February 16, deactivate the auto-email in the old system so that your client does not receive double emails. All your auto-emails in the old system will automatically be deactivated the night of February 15.
 - **Do you have any Auto-Emails set to go to yourself?** These will also convert and be available for you to reactivate in the updated system. But if you have set yourself up as a Contact using your business email address that is in the Matrix system, the OneHome Portal you get will be in "Agent View" mode. You will see the same information, but not have the ability to set Favorites. The vendor is already in development of an improved agent version of OneHome for release later this year. Until then, if the client view in OneHome is important to you for the auto-emails you set up for yourself, use a personal email address instead of your agent address that is in the Matrix Roster.

- ❑ **CMAs:** If you have any CMAs on the old system that you want to save, download them to your computer. These cannot be transferred to the updated system.
- ❑ **Carts:** If you have set up any general listing carts, or ones assigned specifically to a client, they will not convert and need to be recreated in the new system if you want to keep them.
- ❑ **Hot Sheets:** If you have set specific criteria for your Hot Sheets, you will need to reset them in the updated system.
- ❑ **Market Watch:** If you have set specific criteria for your home screen Market Watch indicators, you will need to reset them in the updated system.
- ❑ **Portal Notification Settings:** Click the utility drop-down menu at the far right of the screen (next to “Hello, [your name]”), and select “Settings.” On the Settings screen, click on “Portal Notification Settings.” If you had any settings here, you need to re-enter them. If you did not, you may want to consider making settings. It’s a great way of keeping informed of your clients’ activity in OneHome.
- ❑ **Teams:** We have a new Team Search under the Roster menu. If you are a Team Owner, search and view your Team to make sure everyone on your team is listed.
- ❑ **Financial Calculators:** Anything you created and saved under the Finance tab (such as Seller Net Sheets and Buyer Closing Costs), will not be transferred. Recreate any you want to keep in the updated system.
- ❑ **Custom Single Line Grids:** Any custom single line grids you created cannot be transferred to the updated system. Recreate any that you still regularly use.
- ❑ **Custom Exports:** Any custom exports you created cannot be transferred to the updated system. Recreate any that you still regularly use.
- ❑ **Default Search Criteria:** If you set any default search criteria on any of the search screens, you will need to reset them.
- ❑ **New Matrix Web Address:** Update your web browser bookmarks to the new NorthstarMLS Matrix web address: <https://matrix.commondatapatform.com>.

Need to access the old Matrix system to review your information or save any of your CMAs to your system?

Before February 16: <https://matrix.northstarmls.com>

February 16 or later: <https://oldmatrix.northstarmls.com>