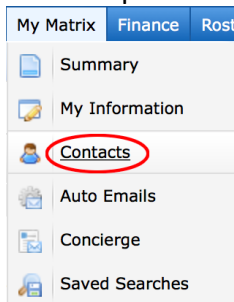


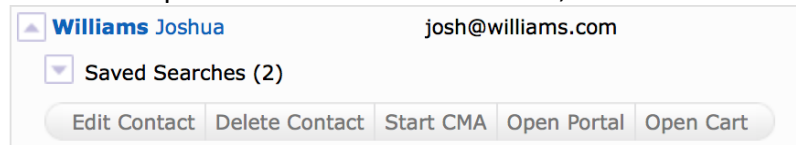
## Check Contacts

The NorthstarMLS Matrix vendor, CoreLogic, has converted your Contacts from FlexMLS into Matrix. They have converted only those which contain a valid email address. If you already have a NorthstarMLS account (dual membership), CoreLogic did not convert any Contact from Flex for which you already have one set up with the same email address in Matrix. Please take a moment to check all your Contacts and revise as needed.

1. Log on to Matrix at <https://matrix.northstarmls.com>.
2. Your user ID is your NRDS ID number. If this is your first time logging in to Matrix, your password is safemls01. Otherwise, it is the password you chose when you logged in for the first time.
3. At the top of the screen, hover over the “My Matrix” tab and select “Contacts.”



4. Click on the name of a Contact, then the “Edit Contact” button to make changes. All Contacts require a minimum of First Name, Last Name and Email Address.



5. Be sure to click the blue “Save” button when finished.

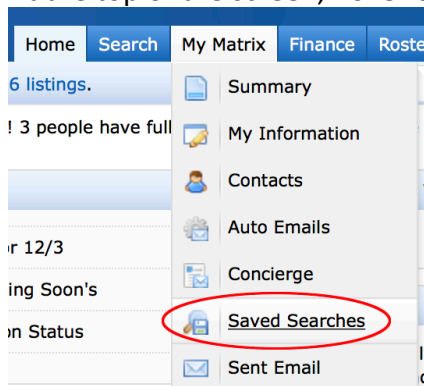


# Check Saved Searches

## Convert Saved Searches to Auto-email

CoreLogic has also converted your Saved Searches from FlexMLS into Matrix. They have matched up your search criteria to the criteria in Matrix as close as possible. But because of the room for error, none of your Matrix Saved Searches have been activated for Auto-Email to your clients. It is important that you first check them for accuracy, make any changes you want, and then convert them to Auto-Emails for your clients if you wish.

6. Log on to Matrix at <https://matrix.northstarmls.com>.
7. Your user ID is your NRDS ID number. If this is your first time logging in to Matrix, your password is safemls01. Otherwise, it is the password you chose when you logged in for the first time.
8. At the top of the screen, hover over the "My Matrix" tab and select "Saved Searches."




9. This will take you to a list of your saved searches converted from FlexMLS.



Note that:

- a. We recommend that you check all of your searches, however the ones where CoreLogic specifically could not find a match for one or more FlexMLS criteria are marked with an asterisk (\*) after the search name.
- b. If you already have a dual membership with accounts in both SEMR FlexMLS and NorthstarMLS Matrix, all your FlexMLS searches were converted, even if you

already have equivalent ones in Matrix.

10. Click the triangle icon  to the left of the search name to open the menu and look at your search criteria. Click the Criteria button to open the Search page with your criteria selected.

A screenshot of a search criteria menu for 'Eden Prairie\*'. The menu is titled 'Eden Prairie\*' and has a user name 'Guy, Test' in the top right. Below the title are several tabs: 'Settings', 'Criteria', 'Results', 'Date Since', 'Market Update', and 'Delete'. The 'Criteria' tab is highlighted with a red circle. Below the tabs, the following criteria are listed: 'Status is 'Active'', 'Municipality is 'EDNP - Eden Prairie'', 'MLS ID is 'RMLS'', 'Style is '(SF) Two Stories'', 'Bedrooms is 6+', 'For Sale or For Rent is 'For Sale'', and 'Ordered by Status, Municipality, List Price'.

11. On this screen, make any changes you want to the Search criteria. If a search field you need is not on the screen, click the Additional Fields “Add/Remove” link at the bottom of the screen.

A button labeled 'Additional Fields Add/Remove' with a small icon of a list on the left.

Double click fields in the “Available Fields” list on the left to add them to the “Selected Fields” list on the right, then click the “Back” button to go back to the search screen with your selected fields at the bottom.

A screenshot of the 'Frequently Used Fields' configuration screen. The screen has a title 'Frequently Used Fields' and a subtitle 'These are the frequently used search fields; you can add them to your search page to create customized searches.' Below the subtitle are two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes: 'Above Ground Finished Square Footage', 'Accessible', 'Acres', 'Advertising Y/N', 'Agent Remarks', 'Agent/Owner', 'Agricultural Water', 'Air Conditioning', 'Amenities - Shared', 'Amenities - Unit', 'Appliances', and 'Appointment Phone'. The 'Selected Fields' list includes: 'Appliances', 'Construction Status', and 'Townhouse Characteristics'. Between the two lists are buttons for 'Add ->', 'Remove <-', 'Move Up', and 'Move Down'. At the bottom left of the screen is a 'Search:' input field.

A button labeled 'Back' with a left-pointing arrow icon.

12. When you have the search criteria set that you want, click the blue “Save” button at the bottom of the screen.

A blue button labeled 'Save' with a document icon on the left.

13. This will take you back to the Saved Search “Settings” screen.

[Turn this Saved Search into an Auto Email](#)

**Settings for 'Eden Prairie\*'**

Search Name:

Contact:  [Create a New Contact](#)

Enable as Favorite Search on Home tab (10 maximum)

**Criteria**

Status is 'Active'  
Municipality is 'EDNP - Eden Prairie'  
Style is '(SF) Two Stories'  
Bedrooms is 6+  
For Sale or For Rent is 'For Sale'

14. Here you can:

- Change the name of your Search (or just remove the asterisk)
- Select a Contact for the Search. Or create a new Contact on the fly by clicking the “Create a New Contact” link.
- Click the checkbox to enable it as a Favorite on your Matrix Home tab. If this is a search you run often, checking the box will place it in a My Favorite Searches box on the Home tab for fast access every time you log in.
- Convert the Saved Search into an Auto Email.

15. To convert the Saved Search to an Auto-Email, click the link “Turn this Saved Search into An Auto Email” at the top of the screen.

[Turn this Saved Search into an Auto Email](#)

**Settings for 'Eden Prairie\*'**

Search Name:

Contact:  [Create a New Contact](#)

Enable as Favorite Search on Home tab (10 maximum)

16. This will take you to the Auto-Email set-up screen. In the first section, **Recipients**, select or create a Contact if you do not already have one selected. You may also click the BCC box if you want a “blind” copy emailed to you each time this Auto-Email goes to your client.

Settings for 'Eden Prairie\*'

Recipients

Contact: Williams, Joshua [Create a New Contact](#)

To: josh@williams.com (Williams, Joshua)

CC:

BCC me a copy of all emails

17. In the **Message** section, type in an email subject line. Then, complete these pieces:
- Salutation: Click the "Edit" link to revise as desired.
  - Welcome Email Message: This is the message in the first email your client receives where they click a link to accept and activate your Auto-Emails. Standard text is already provided, but you may edit however you wish.
  - Recurring Email Message: Click the "Recurring Email" tab to edit your recurring email message. This is the text that will be in every Auto-Email after that first Welcome message email.
  - Signature: This is your email signature that you may have already set in the My Matrix>>My Information section. But if not, you can do it from here by clicking the "Edit Your Signature" link.

Message

Subject:


Welcome Email [Recurring Email](#)

Salutation: Hi Joshua, [Edit](#)

Message: Welcome to "The Portal"!

All messages I send to you containing NorthstarMLS, the Multiple Listing Service (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 NorthstarMLS listing information I've prepared for you in

Signature: 

Tom Flaherty  
NorthstarMLS  
651-251-3200

[Edit Your Signature](#)

18. In the Settings section, you have these options:

 Settings

Concierge:  Enable concierge mode


Display: All customer displays are automatically available to your contact, except when viewed from a phone [Additional](#)>>

Show this contact in Reverse Prospecting results

Enable as a Favorite Search on Home tab (10 maximum)

- a. **Concierge Mode:** Do you want to screen matches to your search criteria before they go to your client? If so, click to select “Enable concierge mode.” Any new matches to your search will then be held for your review where you can Accept (sending them to your client) or Reject.
- b. **Displays:** Your client will automatically have access to all customer listing display formats in their Client Portal. These displays are responsive design for optimal display on desk/laptop, tablet and phone. If you want them to access additional displays in their portal, such as custom single line displays you create, click the “Additional” link to select them.
- c. **Reverse Prospecting:** By leaving this selected, agents who have listings meeting your client’s search criteria will be able to see this in their Reverse Prospecting results. They will be able to see your name and email address only. They **will not** have access to your client’s name or contact information. This allows List Agents to reach out to you, often with additional info that may be of interest to your client, such as upcoming price reductions, open house, etc.
- d. **Favorite Search:** If this is a search that you like to check and run frequently, check this box to make it available in your My Favorite Searches box on the Home tab.


19. Finally, set a Schedule for how frequently you want the search to automatically run and send updates to your client.

 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 type="checkbox"/> All AM	<input type="checkbox"/> AM	<input type="checkbox"/> AM	<input type="checkbox"/> AM	<input type="checkbox"/> AM	<input type="checkbox"/> AM	<input type="checkbox"/> AM	<input 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.

- a. **ASAP:** Select this if you want the Auto-Email to run throughout the day and send updates to your client as soon as they are available. There is no limit to the number of emails that will go out, so make sure your client is OK with receiving frequent emails.
- b. **Daily:** This option gives you a lot of flexibility for frequency. You can select All AM, All PM, specific days, and any combination in between that best meets your client’s needs.

- c. **Monthly:** For clients not actively looking but still want to keep up on the market.
20. When you have everything set the way you want it, don't forget to click the blue "Save" button at the bottom of the screen. This will activate the Auto-Email and send the Welcome email to your client with a link to their Client Portal containing the initial search results.

