



## MIGRATING PROSPECTS AND SEARCHES TO MATRIX

The Matrix Client Portal is a consumer-friendly product that can enhance your client’s home search process. Matrix creates a Client Portal for each of your contacts where they not only view the listings you have sent them, but can also create and save their own searches to share with you. For your convenience, most of your Clients from NTREIS Listings have been pulled over into Matrix – your saved searches will be available prior to cutover. The Client Searches in Matrix are not activated; this allows you to determine if and when you migrate clients to the Portal.

NOTE: Mapsco fields will not be used in Matrix, so your searches containing Mapsco fields will not be migrated to Matrix.

### STEP ONE: REVIEW CONTACTS & SEARCHES IN MATRIX

Review your Contacts and Searches in Matrix to confirm that the information was migrated accurately and completely. To ensure a proper conversion, contacts must contain a first name, last name and email address.

### STEP TWO: DEACTIVATE CLIENT GATEWAY AUTO-NOTIFICATIONS

To avoid duplicate notifications, you must deactivate auto-notifications in NTREIS Listings before activating auto-emails in Matrix. Locate your searches in your prospect’s record and select the Settings for each search to modify the notifications:

<u>Contact Info</u>				
<u>Searches/Updates</u>	<b>Search Name</b>	<b>Notify Type</b>	<b>Status</b>	<b>Last Web Site Access</b>
<u>Comments</u>	Addison Search	Auto-Notify	Last Email: Jun 12 2014 2:10PM	8/30/2011 09:50:49 <a href="#">Criteria</a> <a href="#">Settings</a> <a href="#">Delete</a>
<u>Prospect Gateway</u>	Polygon	Auto-Notify	Last Email: May 29 2014 2:12PM	10/19/2011 09:07:00 <a href="#">Criteria</a> <a href="#">Settings</a> <a href="#">Delete</a>
<u>Email History</u>	bettys search	Manual Notify	Last Timestamp: Feb 4 2014 3:48AM	7/19/2013 12:58:35 <a href="#">Criteria</a> <a href="#">Settings</a> <a href="#">Delete</a>
<input type="button" value="Add Another Custom Search to Prospect"/>				

Change the notification from Auto-notify to Manual notify and Click Save at the bottom of the screen:

**Send notification of new listings:**

Auto-Notify - email sent daily to prospect if new listings are available

**Manual Notify - personally run the prospect search and select which listings to send as often/seldom as you wish**  
 Allow me to select from listings that meet the prospect search criteria and are:

**Active Listings**

Off Market Listings

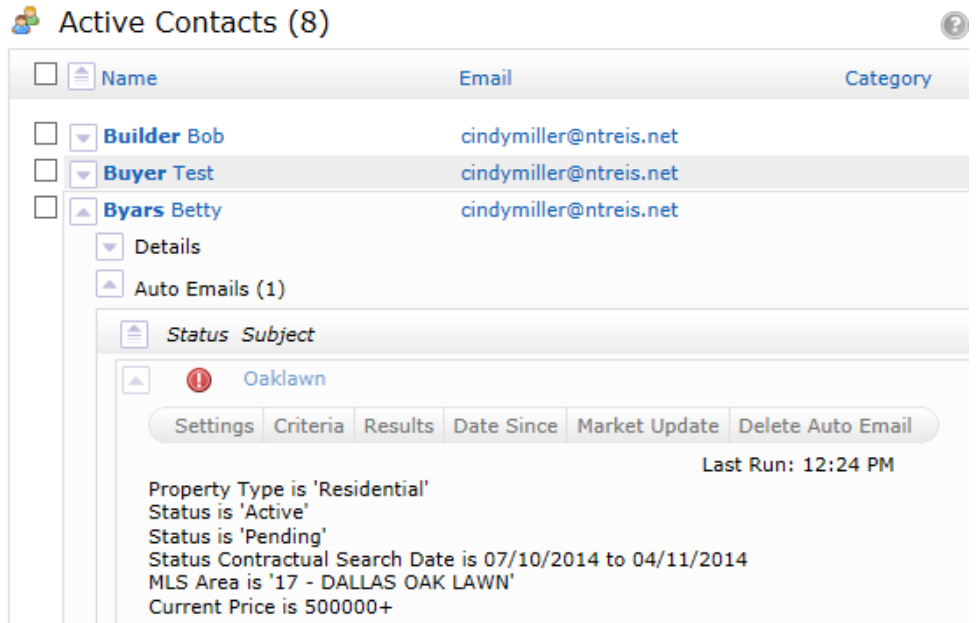
NOTE: If your client has more than one Saved Search, each search must be deactivated separately.

### STEP THREE: ACTIVATE MATRIX AUTO-eMAILS:

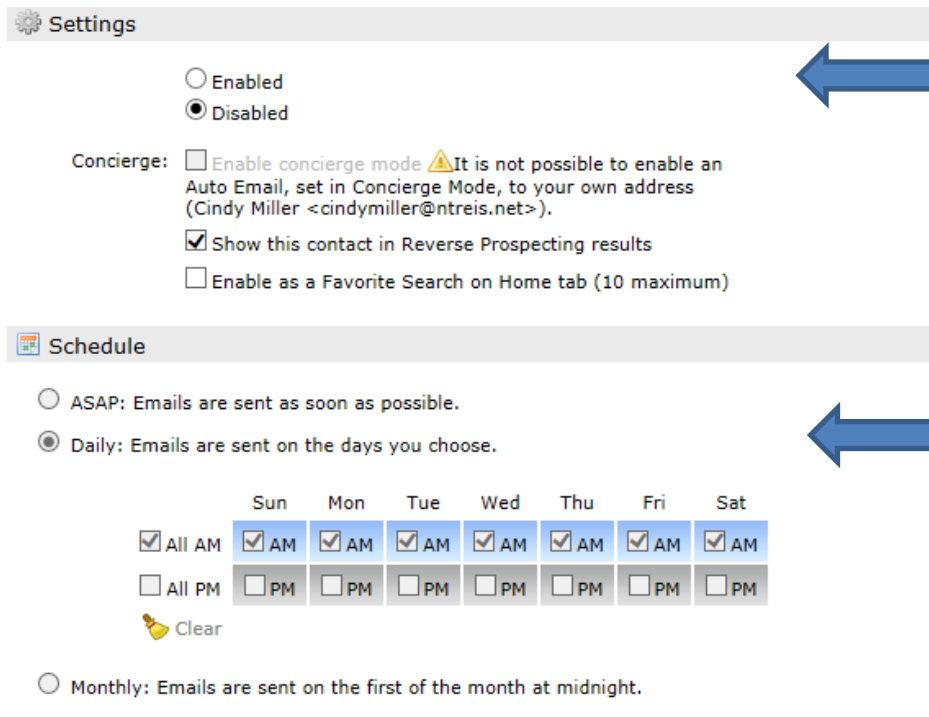
**Before you begin** - First impressions are critical! Before you activate auto-emails and provide clients with access to the Portal, take a few minutes to personalize your Portal with a custom header/footer, home page message and contact information. Visit the My Matrix tab to set up your custom preferences.

Your Saved Searches from NTREIS Listings will display in Matrix and be attached to your Contact. If you do not wish to wait on the searches to migrate over, you may create and add new searches to your Contacts.

Each Saved Search Auto-Notification will need to be made Active on a search-by-search basis.



- Click on the name of the Saved Search and select "Settings":



Change the setting from "Disabled" to "Enabled"

(see Help for info on Concierge mode, Reverse Prospecting and Favorites).

Set the frequency - Matrix allows you to set the frequency for each individual search:

Save your changes!

The Recipients info at the top of the settings page will default to the Contact's information you just attached to. If you wish to change this, click the drop-down menu and select a different Contact.

- Write a Subject line. (NOTE: A Subject line is required to setup the email.) The system will fill in a message welcoming the contact to the portal and a different message for subsequent emails, so you can leave the message as is; if you wish to overwrite the standard messaging you can type your own message.
- You may also edit your signature here – this signature will apply to all of your auto-emails.
- Click Save.

**NOTE:** Unlike NTREIS Listings, the Auto-Notification emails will not expire. The emails will continue to be sent to the client until the client unsubscribes, you disable the Search, or the Auto-Emails have not been viewed for 30 days by the client.

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

### Settings for 'Oaklawn'

**Status**

Status: **Disabled by Agent**

**Recipients**

Contact: **Byars, Betty**

To: cindymiller@ntreis.net (Byars, Betty)

CC:

BCC me a copy of all emails

Subject: **Oaklawn**

Message:

[English](#)

Signature: Cindy Miller, RCE  
NTREIS, Inc.  
1950 N. Stemmons Fwy Suite 318  
Dallas, TX 75207  
cindymiller@ntreis.net  
214-800-8420

[Edit Your Signature](#)