

CRMLS Matrix FAQ Cheat Sheet

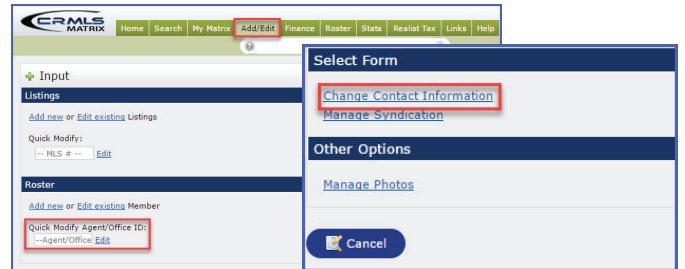
Get the answers you need.

Don't have time to call CRMLS Support? See if your question is answered here in this helpful guide to common questions. Still need help? We're available 7 days a week at crmls.org/support and (800) 925-1525.

FAQ Answers

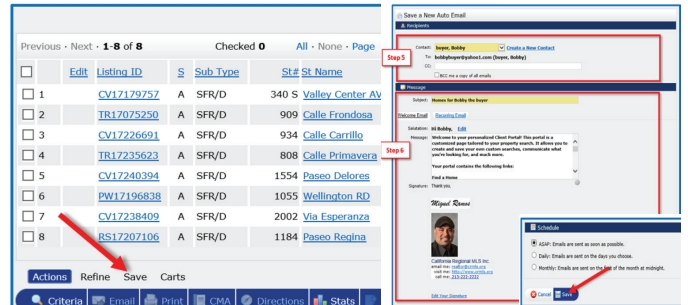
How do I update my personal contact info in Matrix?

Click the **Add/Edit** tab. Under **Roster**, type your Agent or Office ID into the **Quick Modify Agent/Office ID** field, then click **Edit**. Under **Select Form**, click **Change Contact Information**. Update your information and Preferred Contact Order as needed. When finished, click **Submit Member**.



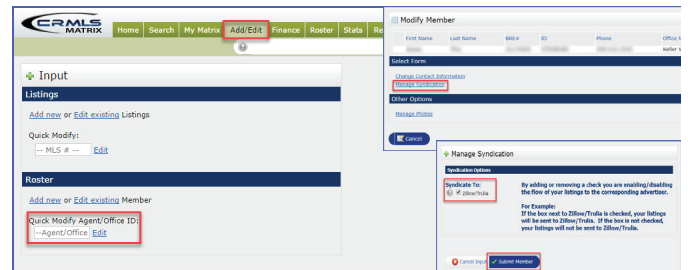
How do I create an automatic email?

From any search results page in Matrix, click **Save**, then select **New Auto Email**. Choose a contact (or create a new contact) to receive the email. Type a subject for the email in the **Subject** field. Matrix will display a default message in the **Welcome Email** and **Recurring Email** fields; you may edit these. Select the dates and times you'd like the emails sent. Then click **Save**.



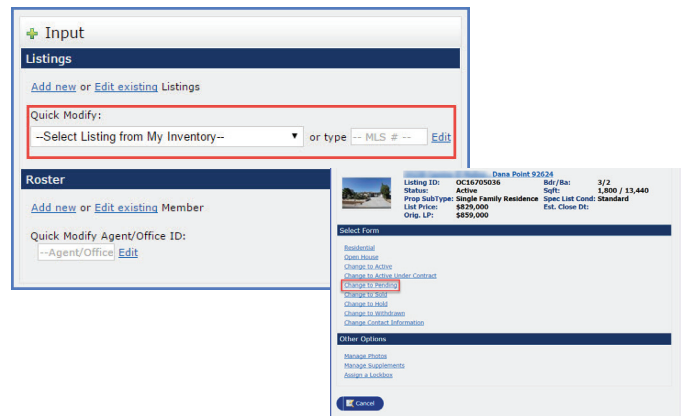
How do I opt-in to Zillow and Trulia?*

For agents: Click the **Add/Edit** tab. Under **Roster**, type your **Agent ID** into the **Quick Modify** field and click **Edit**. Under **Modify Member**, click on **Manage Syndication**. To opt-in, find the **Syndicate To** section, and click the box next to **Zillow/Trulia** in that section. Finalize by clicking **Submit Agent**.



How do I update the status of a listing?

Click the **Add/Edit** tab. In the **Quick Modify** drop-down menu, select the listing you want to update. Under the **Select Form** section, you will see options to change the listing status to **Active**, **Active Under Contract**, **Pending**, **Sold**, **Hold**, and **Withdrawn**. Click the status you want.



From here, you will see a variety of fields that you need to complete, depending on the status. Fill out as many fields as possible. **Required fields are highlighted in yellow**. When you are done, click **Submit Listing**.

*Syndication is at your broker's discretion. If "Manage Syndication" does not appear, contact your broker directly to determine your syndication options.

