

HOW IT WORKS:

Many agents work as part of a real estate team, which is why Matrix has a Team Function. Teams can consist of groups or two agents taking care of each other's clients while on vacation. There are many different versions of teams. The Matrix Teams functionality makes it possible to add other agents to a team, and also make it possible for another agent to add you to their team.

Agents (or their assistants) may work on behalf of another agent. It is also possible to impersonate another agent.

Matrix will only allow you to add others to your team who have an Active Matrix ID on the system.

Impersonate Another Agent

If an agent you work with added you to her team in Matrix and set you up to impersonate her, you would be able to do the following things:

- Emails sent from Matrix would be sent from her name and email address, and would use her email banner and footer (if she had chosen one) and email signature.
- Print reports – any reports that are printed while impersonating another agent will have the information of the agent being impersonated in the “Courtesy of” information. In other words, the report will look as if it were printed by the agent that you are impersonating.
- Access another agent's Matrix Contacts, Saved Searches (you cannot change her team settings).
When you send an email from Matrix while you are impersonating another agent, the name and email address in the “From” line will be highlighted in yellow. This is to call attention to the fact that you are sending that email as that agent. This means that to the client, the email will look exactly as if it came from the agent being impersonated.

Working on Behalf of Another Agent

If an agent you work with added you to his team in Matrix and set you up to work on behalf of him, you would be able to do the following things while working on behalf of him in Matrix:

- Emails sent from Matrix would be sent from your name and email address on his behalf and would use your email banner and footer (if you have chosen one) and email signature.
- Print reports - any reports that you print while working on behalf of another agent will indicate that they were printed by you on behalf of the other agent.
- Access his Matrix Contacts, Saved Searches (you cannot change his team settings)

Adding Other Agents as Your Team Members

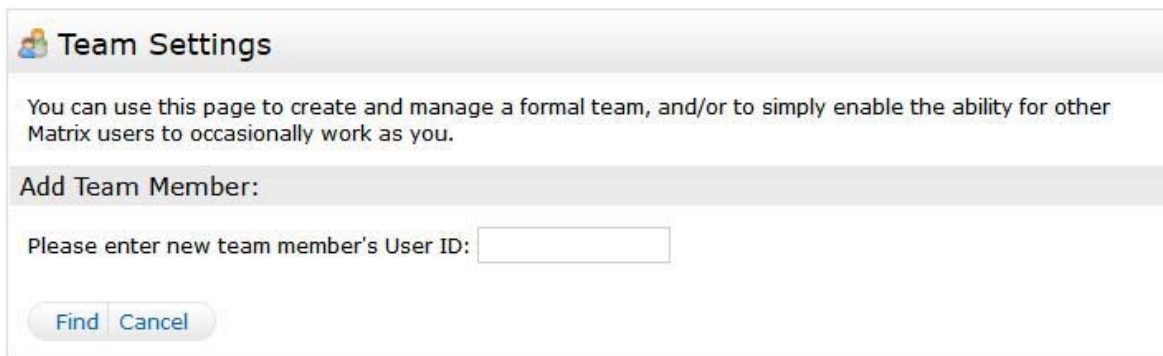
Each Matrix user that is added to your team will have full access to your Matrix account and can either “impersonate” you or “work on your behalf,” depending on the type of access you grant them.

SETTING UP YOUR TEAM IN MATRIX

You can use this feature to create and manage a formal team, and/or to simply enable the ability for other Matrix users to occasionally work as you (if you are away or have an illness).

To set up:

- In upper right corner of Matrix, click on drop down arrow (after name) and select **Settings**.
- Click on **Team Settings**
- Click on **Click here to create a team** (you will need each of their IDs)



[← Back to Settings](#)

- Type in the **agent ID** for the agent you want to add to your team and click on **Find**. If you do not know the ID, you can find it through an Agent search (Search tab).
- Select whether you want this colleague to **Impersonate you** or **Work on Behalf of you** (see page 1 for details on each).
- Click the **Add** button.

After adding your first team member, you will come to the main Team Settings screen shown. Here you can control the following:

- Add additional team members (click the Add link to add a team member and/or someone that can work as you.)
- Delete team members or edit their impersonate/work on behalf status.
- Name your team (optional). Be sure to click the “Save” button after typing in your name.
- Set yourself up to either impersonate or work on behalf of the team.
- Allow team members the option of switching between their own names and the Team name when printing and emailing to Team Contacts. Be sure to click the “Save” button after checking or unchecking this box.
- Disable the team function.

USING TEAM/IDENTITY SHARING

Once you've done that, the Member who has been allowed that permission can click on their **"Hello, (Name)"** in the top right of Matrix.

All the shared ID's they can assume will appear there and they just click on the one they if more than one. When they click on it, it will read:

"Switch to – (Agent 1)" or

"Switch to – (Agent 2)" (if there's more than 1 person whose sharing).

When one of your team members logs in, they can switch from their own individual login to the Team login by clicking on their name in the upper right corner of the screen to open the select pop-up. There he can click to select the team name (or your name if you did not create a team name).

They can now see in the upper right (and highlighted in yellow on the Home page) that they are working as the team. When they click on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to your (the Team's) items.

When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone:

If they are set to impersonate you, they have the same choice except that if they select the Team, it will use your email address, not theirs.

To leave working as the team and go back to working as yourself, click the "Working as" link in the upper right of the screen and click to select your own name.