How to Configure Client Portal Notifications in Matrix

Matrix™

Greater Rochester
Association of REALTORS®
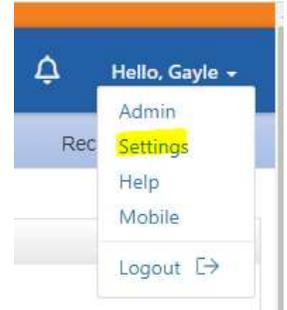Powering Real Estate Professionals

This quick reference guide will teach you how to turn on Client Portal notifications.

Step 1: In the upper right corner of Matrix, click on drop down arrow (after name) and select **Settings**

Step 2: Click on Portal Activity Notification Settings on the bottom left.

Portal Notification Settings
Number of Notifications: 10

Step 3: Select the Check box of Client Portal activities you want to be notified about.
Note: If you choose email notifications the email will be sent to your agent email address in the Matrix roster.

Portal Activity Notification Settings

Use this page to control how and when you would like to be notified of activity performed by your contacts.

When a contact does this...	Notify me ASAP via **Email**	Notify me ASAP via **Text**	Notify me via **Daily Summary Email**
Visits Portal	☐	☑	☑
Saves a Favorite	☐	☑	☑
Removes a Favorite	☑	☐	☑
Saves a Possibility	☐	☑	☑
Removes a Possibility	☑	☐	☑
Discards a Listing	☐	☑	☑

Step 4: If you chose to be notified via text, click the link below to edit your cellular information.

Adds Notes	☐	☑	☑
Saves a Search	☐	☑	☑
Visits Portal First Time	☐	☑	☑

Text Notification Settings

Text notifications are sent as emails to your phone's MMS address and will display on your phone as text messages from CRMLS@matrixemailer.com

Mobile Phone Number: _____

Cellular Provider: _____

Click here to edit your cellular information

Step 5: Click "**Send me a verification code**"

Text Notification Settings

Text notifications are sent as emails to your phone's MMS address and will display on your phone as text messages from NYS@matrixemailer.com
Enter your 10-digit mobile phone number and select your provider below. Shortly after clicking the "Send me a verification code" button you should receive a text from NYS@matrixemailer.com. Enter the verification code from that text in order to confirm that your settings are correct.

Mobile Phone Number: 58573231234

Cellular Provider: AT&T

Cancel   Send me a verification code.

Step 6: Enter the validation code received via text, then Click "**Save my cellular information**"

Text Notification Settings

Text notifications are sent as emails to your phone's MMS address and will display on your phone as text messages from NYS@matrixemailer.com
Enter your 10-digit mobile phone number and select your provider below. Shortly after clicking the "Send me a verification code" button you should receive a text from NYS@matrixemailer.com. Enter the verification code from that text in order to confirm that your settings are correct.

Mobile Phone Number: 58573

Cellular Provider: AT&T

Enter Code:

Cancel   Save my cellular information

Step 7: Once completed, click "**Save**"

Text Notification Settings

Text notifications are sent as emails to your phone's MMS address and will display on your phone as text messages from NYS@matrixemailer.com

Mobile Phone Number: 58573   Delete

Cellular Provider: AT&T

Click here to edit your cellular information

Back to Settings   Save