Team Settings

Setting up Teams

1. Login to matrix
   a. Click My Matrix
   b. Click Settings
   c. Click Team Settings
      i. If this is the first time in here click "setup team"
         1. Click Add
         2. Enter the MLS ID of the user you would like to add then click find
         3. Choose between "work on behalf" mode or "impersonation" mode
            a. When having a user work on behalf of you the system will show that anything that is done is done on your behalf
            b. When having someone impersonate you the system will show anything that is done as being done by you and not the user who impersonated you
         4. Click add
      ii. If you already have team members then you can add more or delete existing users
      iii. Repeat steps 1-4 if you have more than one user to add to your team

My Information
Header & Footer · Mobile Header · CMA Cov

Speed Bar Shortcuts
Number of Speed Bar Shortcuts: 2

Team Settings
You have 0 members on your team.

Hot Sheets
Number of Hot Sheets: 5
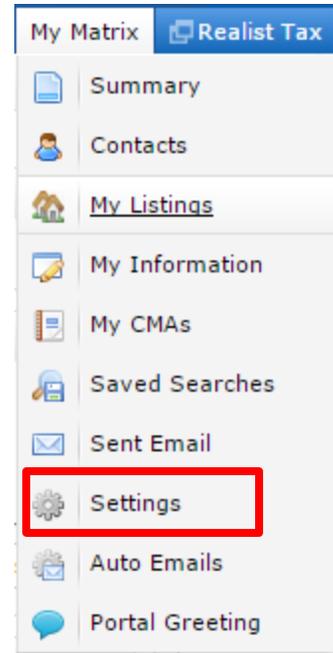
Custom Displays
Number of Custom Displays: 9

Custom Exports
Number of Custom Exports: 4

IDX Configuration
Number of IDX pages: 1 active, 0 inactive

My Matrix | Realist Tax
- Summary
- Contacts
- My Listings
- My Information
- My CMAs
- Saved Searches
- Sent Email
- Settings
- Auto Emails
- Portal Greeting

Team Settings

You can use this page to create and manage a formal team, and/or to simply enable the ability for other Matrix users to occasionally work as you.

You currently have enabled 1 team member. Each team member has full access to your Matrix account, including your My Matrix tab. **Your teammates can optionally work as you, using their "Working As" hyperlink, located in the top-right corner of Matrix.** Disable this team feature.

Last	First	Mode	Email	Office Name	Phone
Castelline	Emily	**Impersonates Me**		Coldwell Banker Mid Am Group	

Delete   Add

Set a Formal Team Name

Back to Settings

Logging in as a team member

1. Login to Matrix

   a. Look into the upper right of Matrix at the "Working as XXX"

   b. Click on this white lettering and it will open a drop down menu

   c. Whoever has allowed you to work on their behalf of has allowed you to impersonate them will display in this list and all you need to do is choose the person you would like to login as

   d. When you are logged in as that person the lettering in white should turn to yellow

   e. To log back in as yourself all you need to do is click the "working as" again and click on your name this time