

Add and Manage Contacts in Matrix

Contacts are the clients and other people you work with in Matrix. Once someone is saved as a contact, you can set up Auto Emails for them, assign listing carts, and create CMAs under their name - so each tool is tied to the right person.

Add a contact

1. Open My Matrix > Contacts.
2. Select Add.
3. Enter the required fields: First Name, Last Name, and Email Address (you can enter more than one email, separated by commas).
4. Add any other details you need (phone, address, notes, and so on).
5. Optional: Under Settings, choose a Category (for example Buyer, Seller, Friend, or Prospect), select a Salutation for Matrix messages, and use Mortgage Pre-Approved or Enable Reverse Prospecting in Matrix if they apply. Reverse Prospecting in Matrix is on by default for the contact - see Reverse Prospecting in Matrix.
6. Select Save.

To load many contacts at once, select Import on the Contacts list instead of Add.

Find and manage contacts

1. Open My Matrix > Contacts.
2. Use the status control to show Active, Inactive, or All.
3. Search using the box labeled Search by name, email, or ref#.
4. Select a contact name to open their record. Tabs include Details, Auto Email, Carts, CMA, Sent Email, Searches, OneHome Searches, and Reverse Prospect.
5. Select Edit on the contact record to change their information, or Close to return to the list.

Export contacts

1. On the Contacts list, select the checkbox next to the contact (or contacts) you want to export.
2. Open Actions and select Export.

Delete a contact

1. On the Contacts list, select the checkbox next to the contact (or contacts).
2. Open Actions and select Delete.

Actions also includes Set Active and Set Inactive.

Tips

- Contacts must opt in before they can receive messages from you; use the opt-in options on the contact's Details tab when needed.
- Reverse prospecting can be set on the contact and again on each Auto Email search - both layers matter. Use Ref# when talking with listing agents so client details stay private.
- Keep Active vs Inactive accurate so your contact list stays clear.

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