Matrix, MLS-Touch, and Prospects CRM Integration
Course Notes

Ready to transform the way you manage your real estate business? Step into the spotlight and become the driving force behind every transaction! This engaging and interactive session will empower you to:

Streamline Your Workflow – Work smarter, not harder, with tools that simplify your daily operations.
Supercharge Your Personal Brand – Stand out in a competitive market and leave a lasting impression.
Capture and Convert Leads – Learn strategies to attract prospects and turn them into loyal clients.
Build Powerful Relationships – Strengthen connections that fuel your long-term success.
Stay Seamlessly Connected – Engage clients and prospects effortlessly, no matter where you are.
Join the Stellar MLS Training Team as we explore the seamless integration of MLS-Touch, Prospects CRM, and OneHome with Matrix. Discover the tools and strategies to take your workflow and business planning to the next level.

Let's redefine your approach to real estate and elevate your career!

Table of Contents

SESSION OVERVIEW

Modern Solutions. Intentionally Integrated.

In this special edition training course, we will explore numerous ways in which **MLS-Touch**, **Prospects CRM**, and **OneHome** seamlessly integrate with **Matrix**, the most powerful multiple listing service platform in the business. This course was designed to showcase features of these powerful products that can help you optimize workflows, augment business strategies, and collaborate with your customers without missing a beat!

This class will progress through several areas of focus including:

Contact Database Integration
An Example Customer Journey Workflow
Spotlight of Integrations & Contact Maintenance
Agent Branding
Lead Generation Resources
Setting Up Agent Notifications

So, let's get started….

CONTACT DATABASE INTEGRATION

A robust and well-maintained contact database is one of the foundational keys to a successful career in real estate. Documenting and maintaining information about your customers, prospects, and connections will help guide both day-to-day and long-term strategies as you stay connected. Extremely powerful, the contacts database integration between MLS-Touch, Prospects CRM, and Matrix can also help make that process easy every step of the way.

Capturing Contact Information

To take full advantage of the contacts integration, let's first identify the minimum amount of information required when entering a record in MLS-Touch, Prospects CRM, or Matrix. The goal should be to gather as much information as possible, or as applicable to a particular situation, but it's important to first understand the basics.

To save a contact record, here is the minimum amount of information required:

- Prospects CRM & MLS-Touch: **Last name field only**

- Matrix: **First name, Last name, & Email Address**

Why is this important? Be aware that Matrix will not receive a contact record from Prospects CRM or MLS-Touch without having a value in the fields for first name, last name, and email address. By getting all three (3) pieces of contact info, you can be sure to have that contact record available across MLS-Touch, Prospects CRM, and Matrix!

Most likely, you are already comfortable with the process of simply entering contact information whether that is on your smartphone or perhaps into Matrix as your customers begin their real estate journey. In the next section, we'll explore an example of a customer workflow to identify some of the powerful integrations between MLS-Touch, Prospects CRM, and OneHome as they pertain to Matrix.

Example Customer Workflow
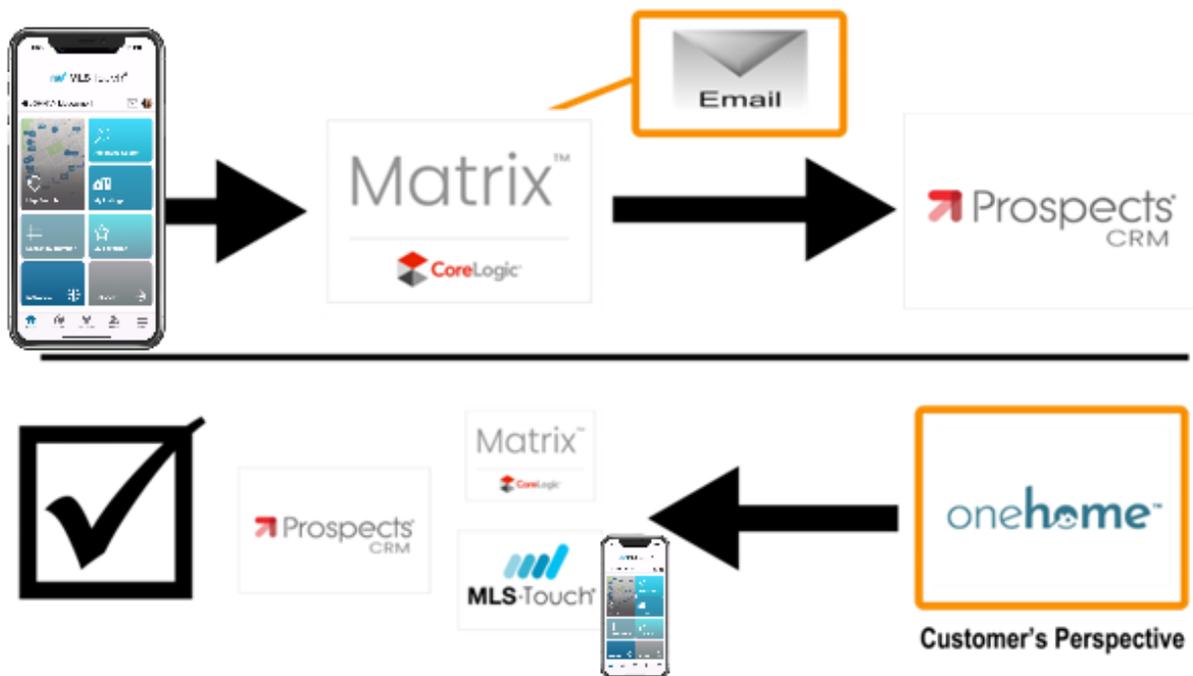
Illustrated in the graphic above, here are the steps of the customer workflow example demonstrated in class that moved between both an agent and customer's perspective.

1. We first captured the new customer's basic information in MLS-Touch.
2. Opening Matrix, we performed a search, sent an email to the customer with several listings to review, and then saved the search criteria.
3. While waiting for the customer to review the email, we opened Prospects CRM to enter additional details and completed the customer's contact information. In addition, tips about organizing records and using key fields in Prospects CRM were showcased.
4. Changing gears to OneHome, and viewing things from the customer's perspective, we demonstrated various interactions with the listings emailed from Matrix and reviewed some of the enhanced features of OneHome including marking a property as a favorite.

5. Returning to Matrix, we reviewed the customer's OneHome account activities, read a note entered in OneHome, added a property to a cart, and then viewed the details in MLS-Touch before switching back to Prospects CRM and tying everything together.

Bonus Tip: *Interested in trying this demonstration out on your own? Just add* **yourself** *as a contact using a personal email address (rather than the email associated with your MLS account) and follow the steps above!*

SPOTLIGHT INTEGRATIONS & More

Favorites / Discards

As was demonstrated in class, in addition to robust contact data, customer favorites and discards can also travel seamlessly between MLS-Touch, Prospects CRM, OneHome, and Matrix. As a reminder, here are the various locations to reference a customer's favorites and discards highlighted in class:

1. Matrix
   a. Recent OneHome Visitors widget on the Matrix Home page
   b. Contact Record
   c. Using the Refine tab when viewing search results
2. MLS-Touch
   a. Contact record
3. Prospects CRM
   a. Contact record > Listing tab

Agent Searches

Searches saved in Matrix are accessible anytime through both Matrix and MLS-Touch.

Carts

Any property added to a customer's cart in Matrix or MLS-Touch can be accessed in either system. And yes, multiple carts per contact are supported and displayed!

Contact Key Fields | Organizational Strategies

When thinking about the maintenance of your contacts database, there are a variety of fields in Prospects CRM that can help you identify, sort, and engage with your connections to help keep you at the center of the transaction and enhance your customer relationships.

Here are the key fields in Prospects CRM that were showcased in class:

Sales Stage, Keywords, Greetings, Notes, Dates, and Additional Fields

When entering contacts in MLS-Touch and Prospects CRM, there is however another question to consider: Would you like the contact to also appear in Matrix? For instance, perhaps you will use Prospects CRM to send out email campaigns to members of your book club and do not necessarily need

them in Matrix since they are not actively searching for real estate. If so, you can decide if would like to display only certain contacts in Matrix. This was illustrated in the last step of our customer demonstration when other contact records were attached to an MLS listing in Prospects CRM such as a contractor or moving company.

Below are settings available to make this determination for a contact in either MLS-Touch or Prospects CRM and the selection stays in sync so you only need to set it once. The selection as to whether to display the contact record in Matrix is labeled in each system as follows:

- MLS-Touch reads "Send to External Systems"

- Prospects CRM displays "Send to remote applications"

AGENT BRANDING

Stellar MLS knows your branding is essential to you and your business. This section will cover setting up branding in MLS-Touch, Prospects CRM, OneHome, and Matrix to help make sure you are all set in each of these great resources!

IMPORTANT NOTE: You are responsible for ensuring that you have permission to use any trademarked logos and branding.

Below is an overview of where and how to get your information, company logo, brand colors, and agent photo placed in the various systems featured in this class.

Company Logo & Brand Colors

Customization can be completed in ***either*** the MLS-Touch mobile app *or* Prospects CRM. If you choose MLS-Touch, begin by tapping the More option in the lower-right corner of the display (1), then the option titled "Brand & Share™"(2):

To set up your logo and color scheme – access the Branding Center. (Note – there is a possibility that you have already set this up in Prospects CRM).
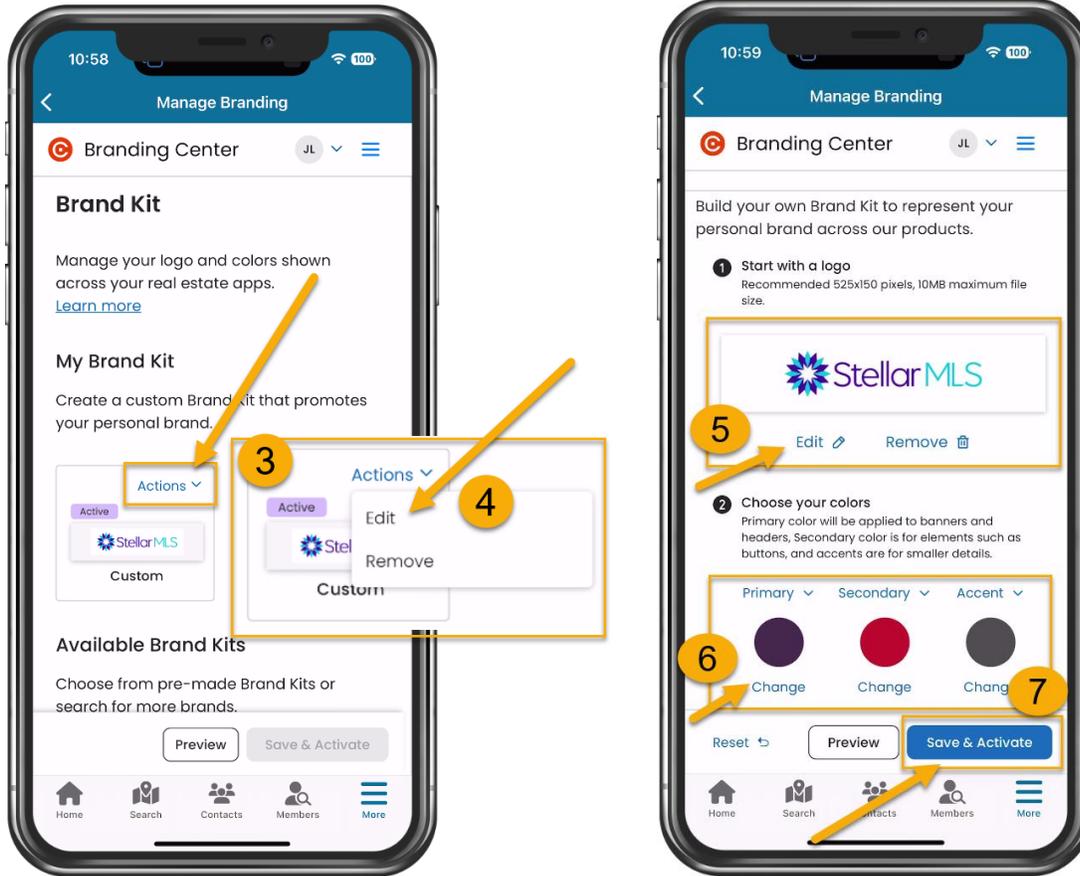
STEP 1: On the Home screen, tap 'More' in the bottom right corner
STEP 2: Tap "Manage Branding"
STEP 3: Tap on the Actions button
STEP 4: Tap the Edit button
STEP 5: (Logo section) Tap on Edit and upload a logo from your phone's camera roll. The recommended logo size is 525px by 150px and in .png file type
STEP 6: (Colors section) Tap on change to edit your Primary/Secondary/Accent colors
STEP 7: Tap on Save & Activate to lock in these changes (You can also preview as well)

IMPORTANT NOTE: You are responsible for ensuring that you have permission to use any trademarked logos and/or branding. Please contact your broker or their authorized representative with questions or for more information as needed.

Again, your authorized company logo and color scheme selections for OneHome are editable only through Prospects CRM and/or MLS-Touch.

Photo & Information

To display your agent photo across the systems, upload (or confirm) your agent photo in **two** places:

Matrix

Click Your Name in the upper-right corner of Matrix then select Settings.
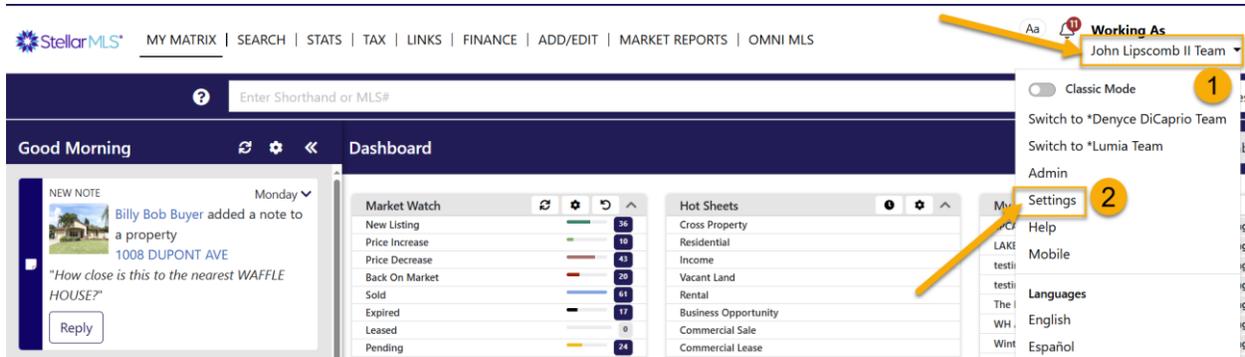
On the next page, click the My Information section:
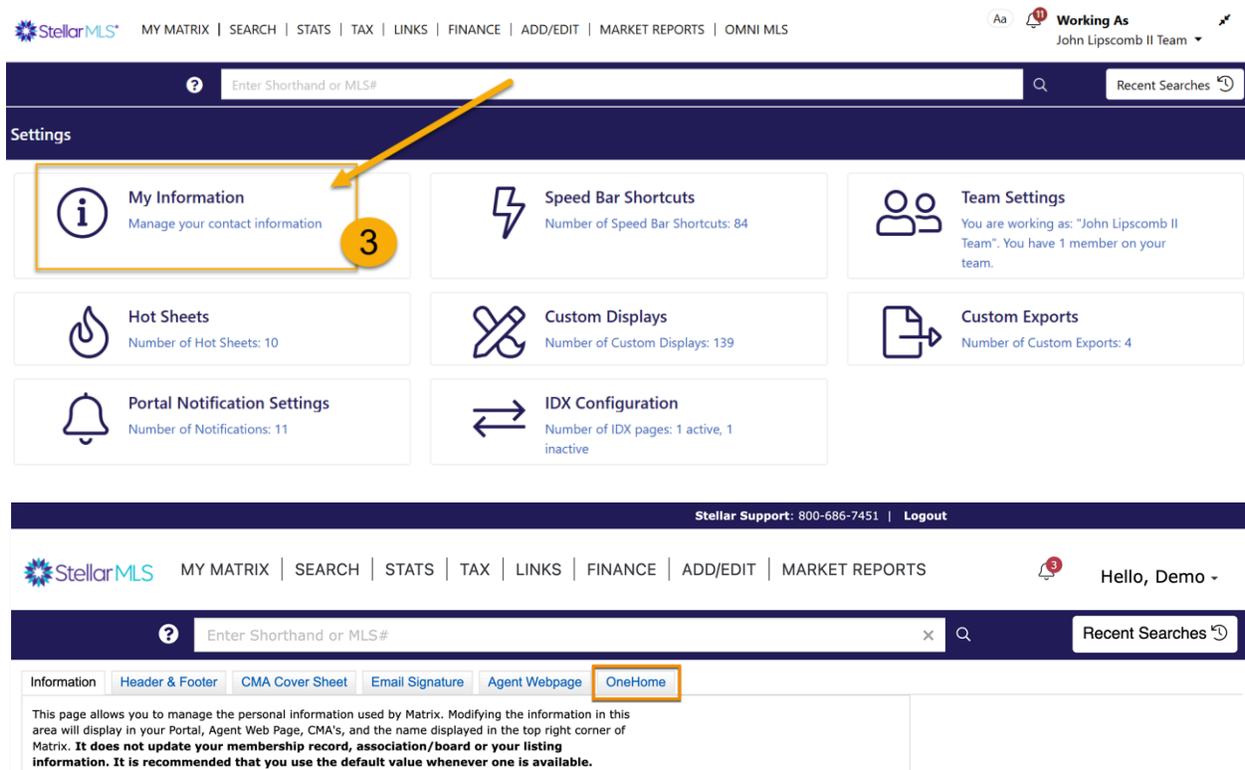
From the list of tabs shown on the next page, select the last one titled "OneHome". Take a moment to review and update the information as applicable to your business. This page also allows you to modify the text shown when a customer first visits the OneHome customer portal and that is displayed in the agent profile section.
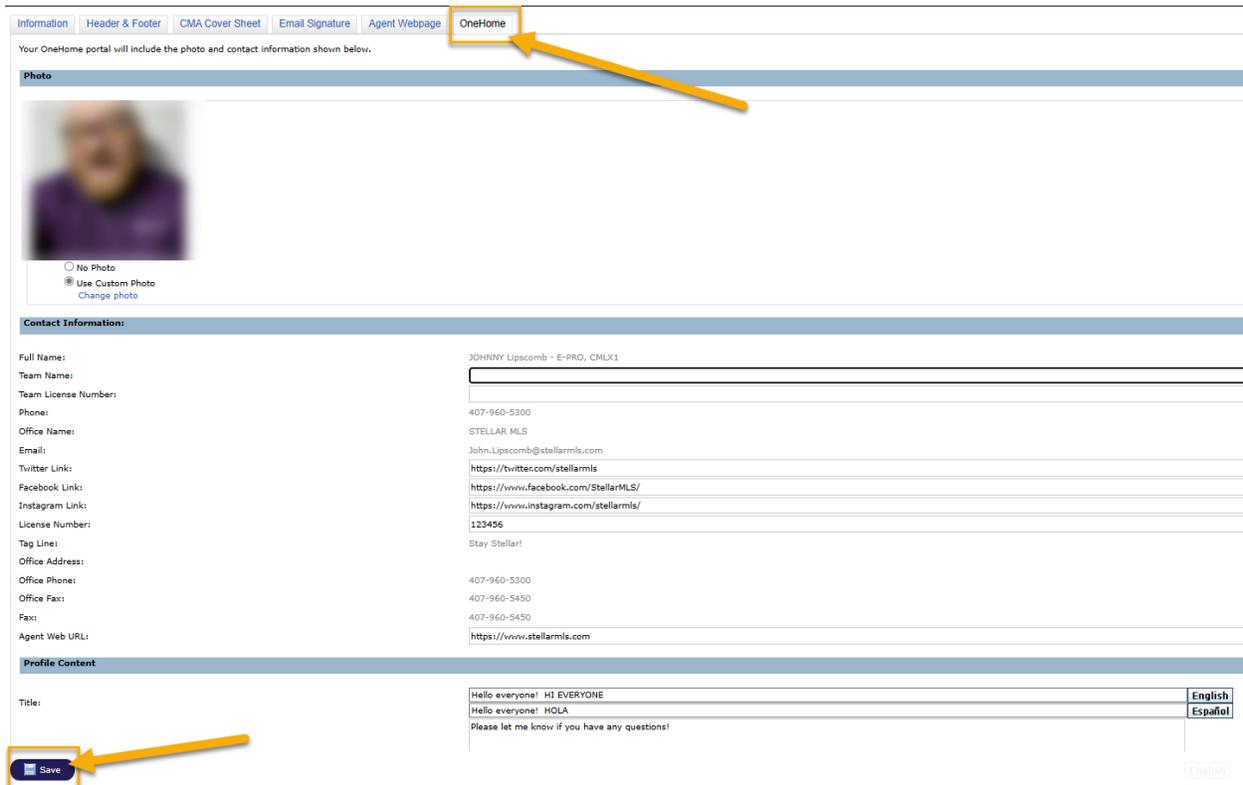
Begin by adding your agent photo. Once saved, this will be shown throughout the OneHome customer portal. Continue through the contact information section and add social media links, your website URL, and adjust the Profile Content section to change the custom text message mentioned above. Lastly, if you have a video hosted on YouTube or Vimeo that you would like featured on the agent profile page of OneHome, add its link in the appropriate field.

On the OneHome tab, any greyed-out contact information is taken from the Information tab on the far left and reflects what is on file with your Board/Association membership record. If you make changes in Matrix, it will not update your Board/Association. However, if you contact your Board/Association, changes to your contact info will then sync over to Matrix once received by Stellar MLS.

If you have not set up the rest of your branding that appears in Matrix, such as on CMAs and various printed reports, please take this opportunity to move through the other tabs and review/update the information as desired.

Prospects CRM
To begin branding the system, click the the gear icon in the upper-right corner of the main display and then select the Customization section from the Configuration screen.
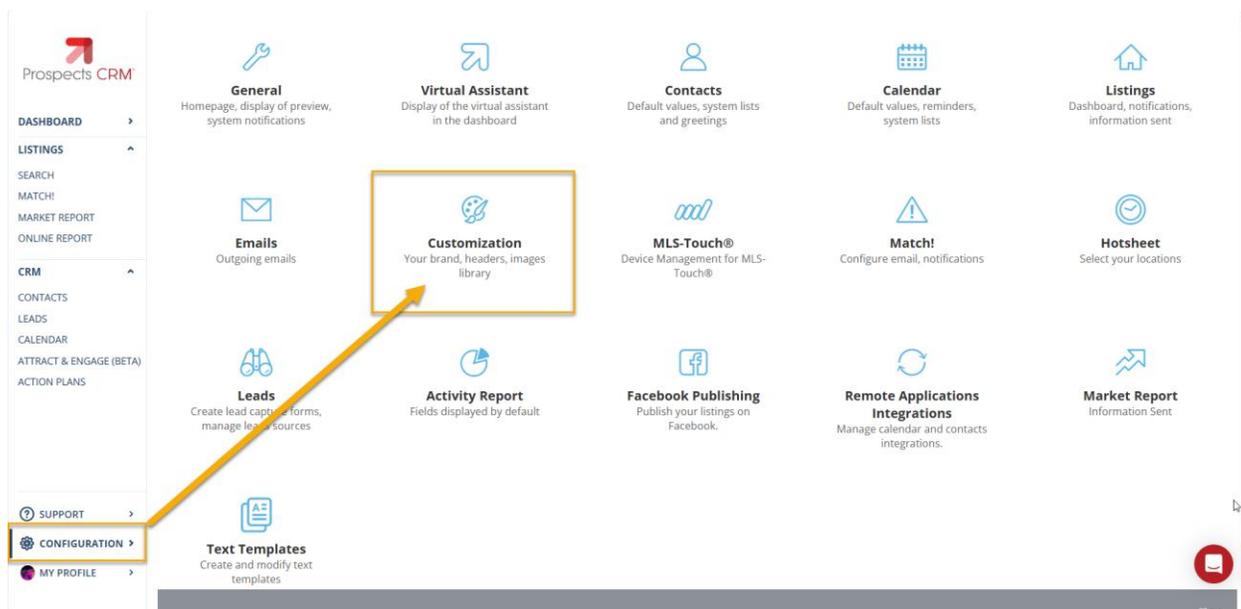
A new pop-up window will appear containing three tabs: Brand & Share, Headers, and Images Management.
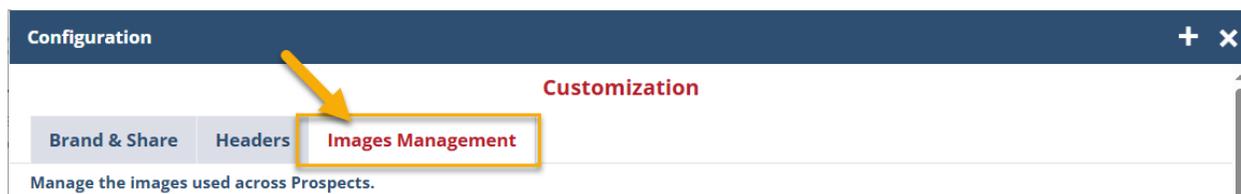
Begin with the Images Management tab and upload your agent photo and company logo from your computer by clicking the Choose button and navigating to the location on your computer where the images are stored. Images added to the Prospects CRM Images Library will then be available throughout the system. Be sure to also choose your main agent photo in the My Agent Picture section by clicking the Modify button!

Next, click the Headers tab and double-click the default entry in the list to verify your contact information.
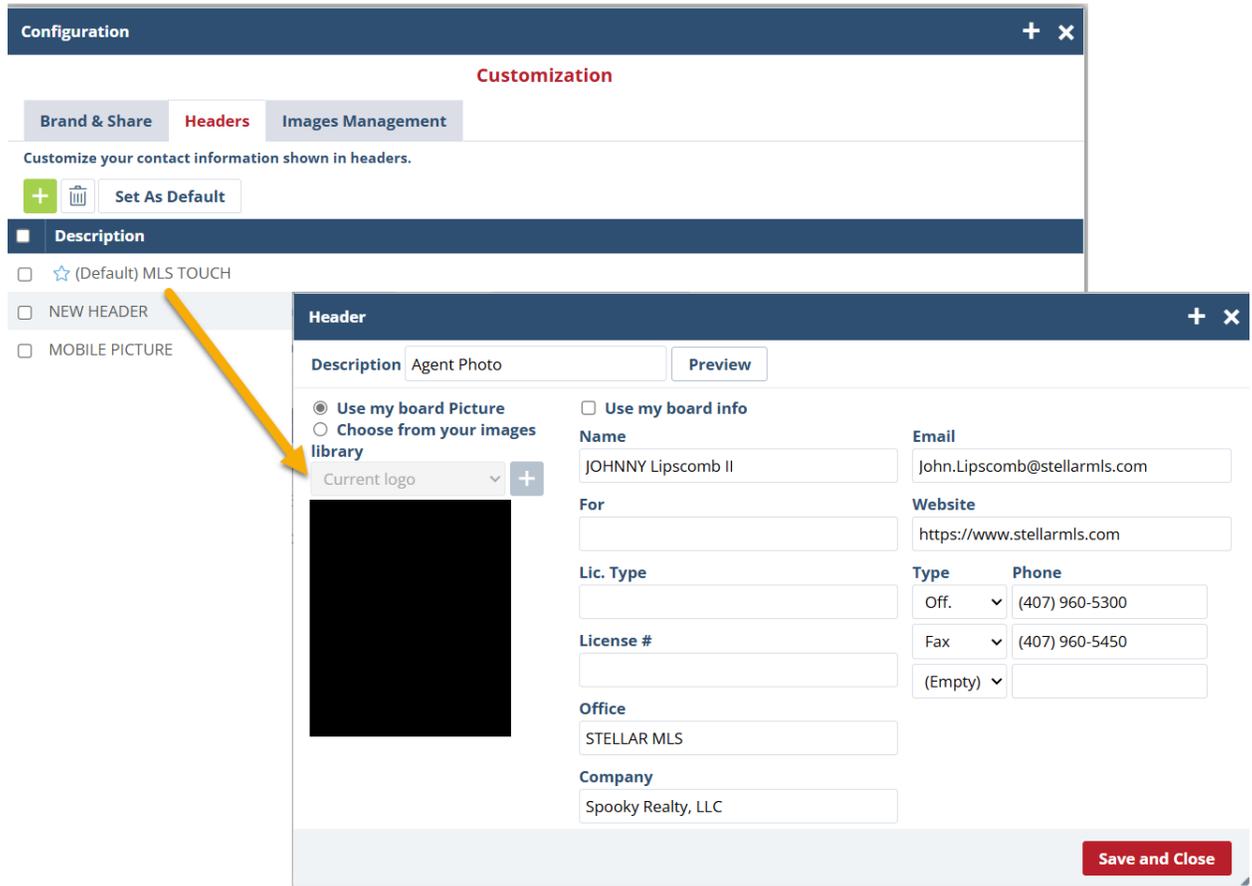
Simply, uncheck the "Use my board info" box should you need to make adjustments to the contact information displayed. Please note that changing the information in Prospects CRM **does not** update your membership record with your local board/association – you would need to contact them directly.

Lastly, click the Brand & Share tab. This will take you to the Branding Center, where you can select company logo and brand colors. Click on the Actions dropdown menu and then click on edit.
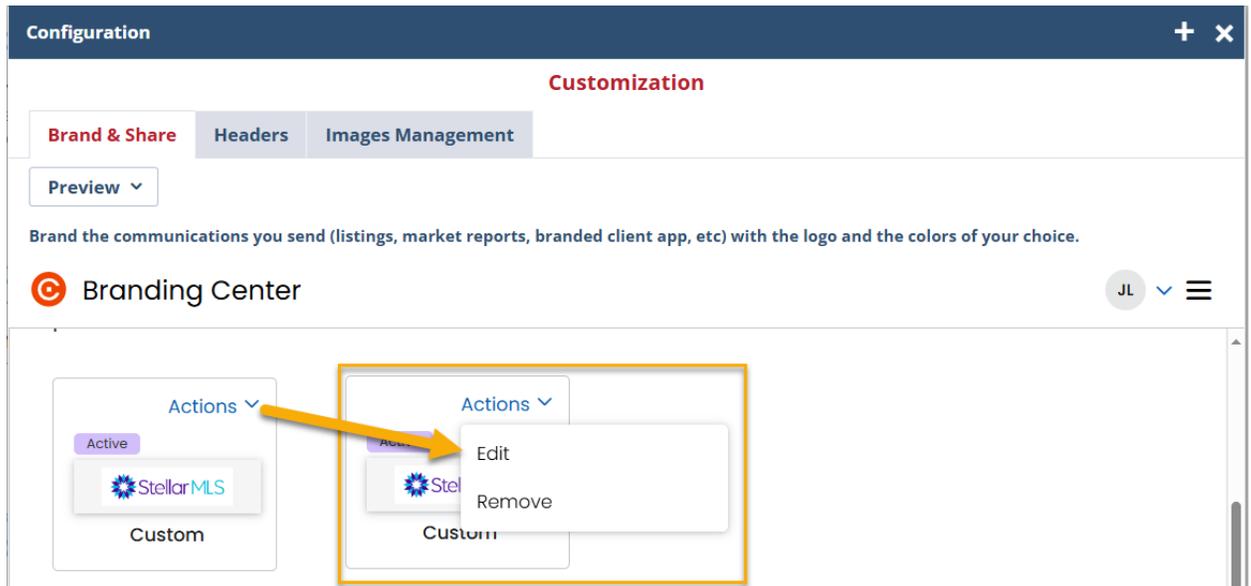
There will be several steps to complete. In the first section, click on Edit to upload your logo. (The logo size recommendations will be above.)
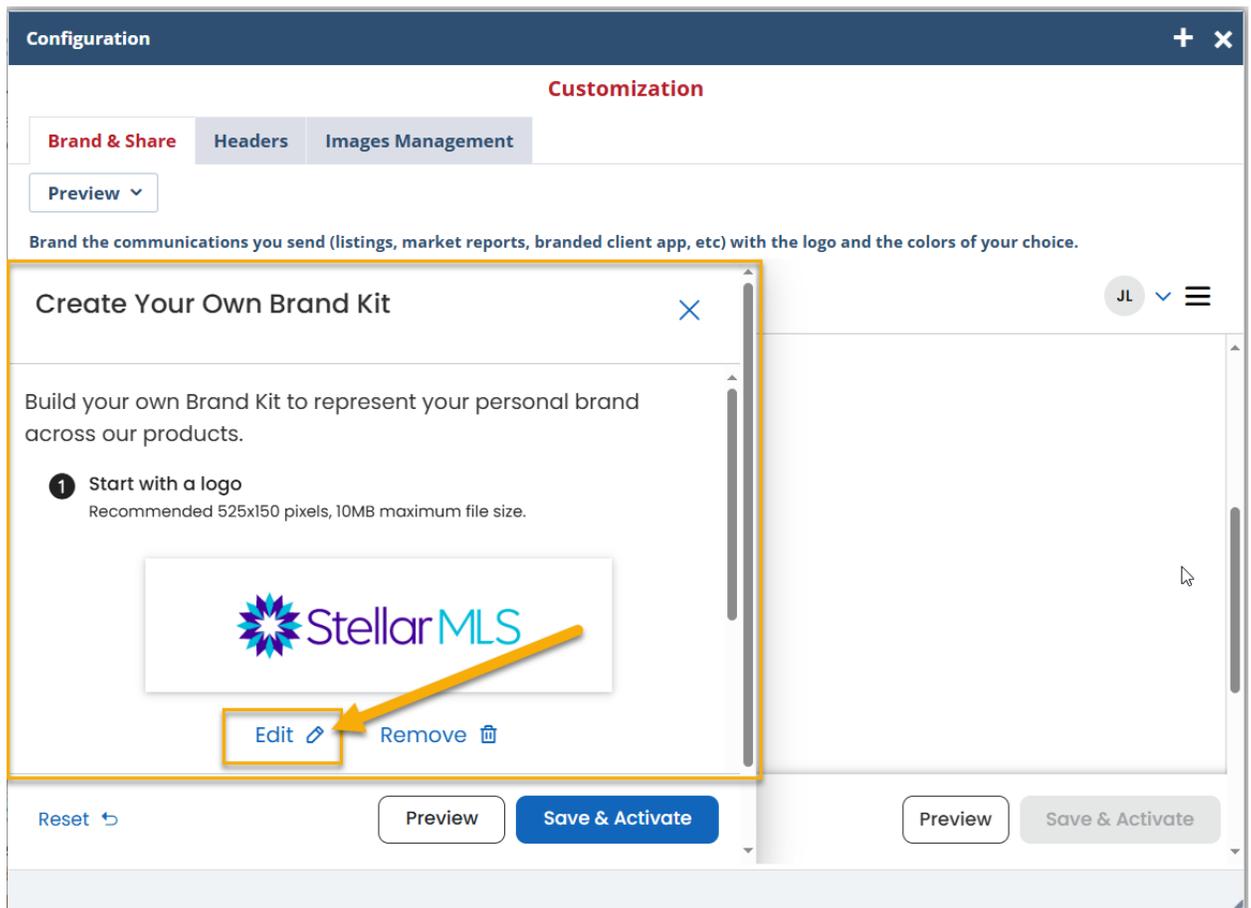
Scroll down and click on the change button(s) to choose your Primary, Secondary, and Accent colors.
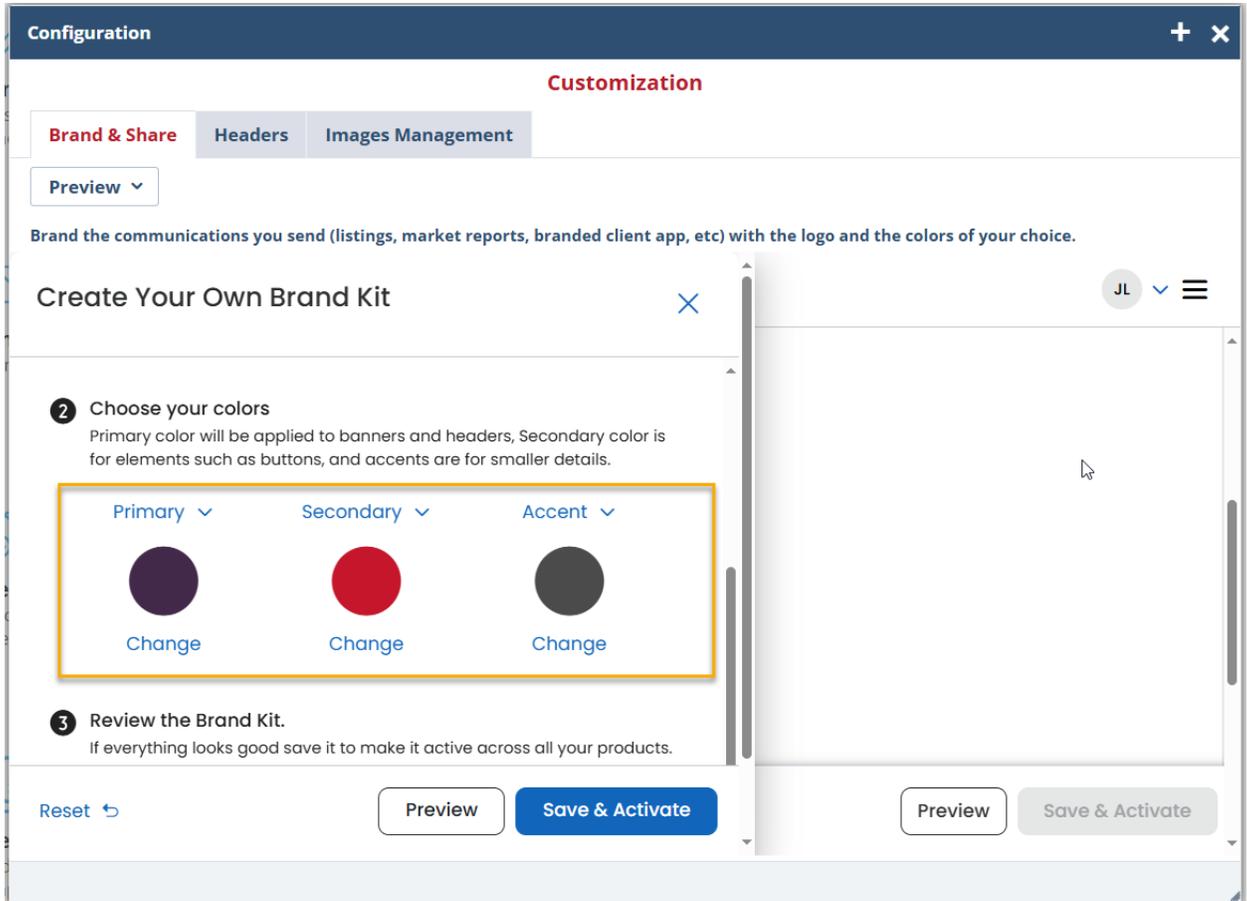
Finally, click on the preview button below. This will show you a preview of the changes that you have made. Once finished, click the Save & Activate button at the bottom right to lock in your changes.
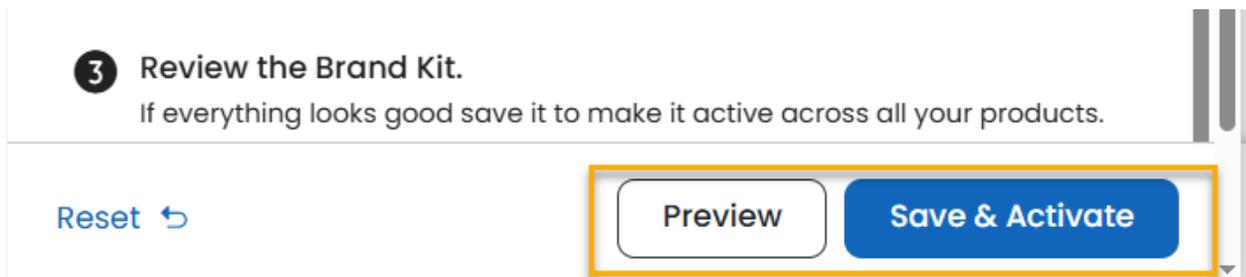
Email Signature

Be sure to set up an email signature in *both* Matrix and Prospects CRM so that applicable emails sent from either system, as well as MLS-Touch, are branded to you.

Matrix
1. Click on your name in upper-right corner of Matrix
2. Select 'Settings' from the dropdown menu
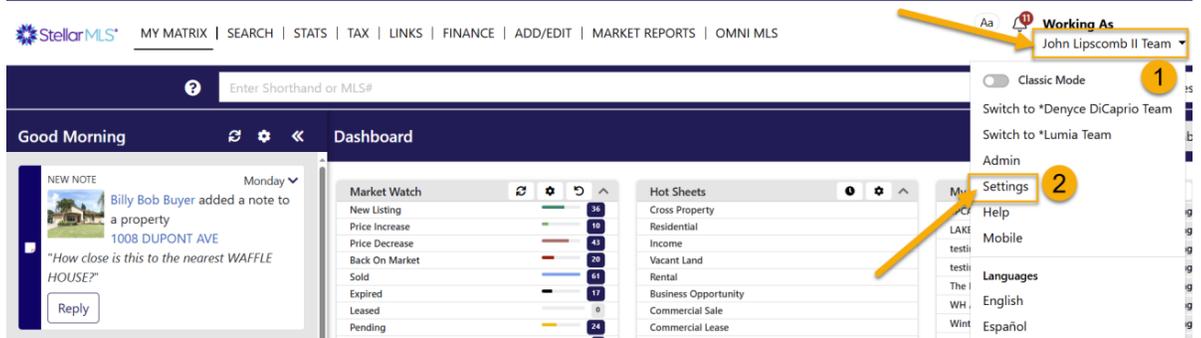
3. Click the 'My Information' section
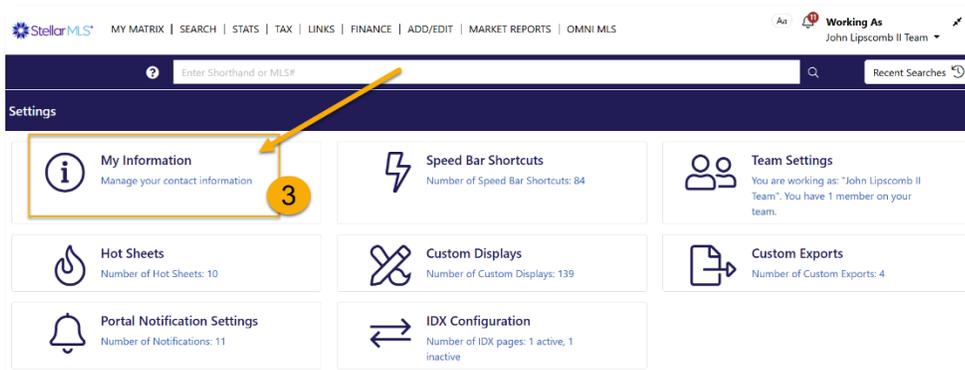
4. Select the "Email Signature" tab and complete your email signature

Bonus Tip: If you would like to add your agent photo to your Matrix email signature, click the image icon in the top toolbar. The images available to select are those uploaded and displayed on both the Header & Footer and CMA Cover Sheet tabs.
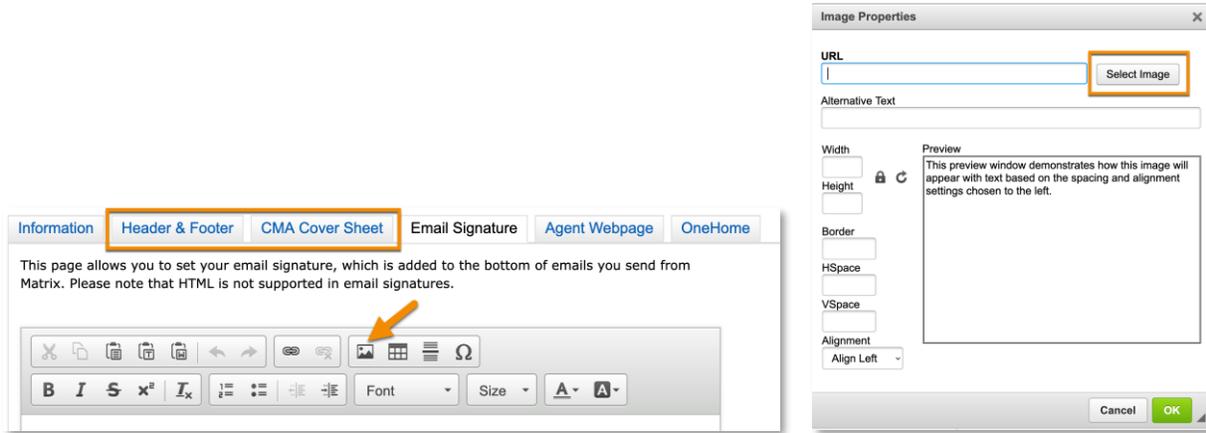
Prospects CRM

With your branding complete, return to the Configuration screen and select the Emails section to set up your outgoing email signature. Reminder, to access the Configuration options, click the gear icon in the upper-right corner of the main display window.
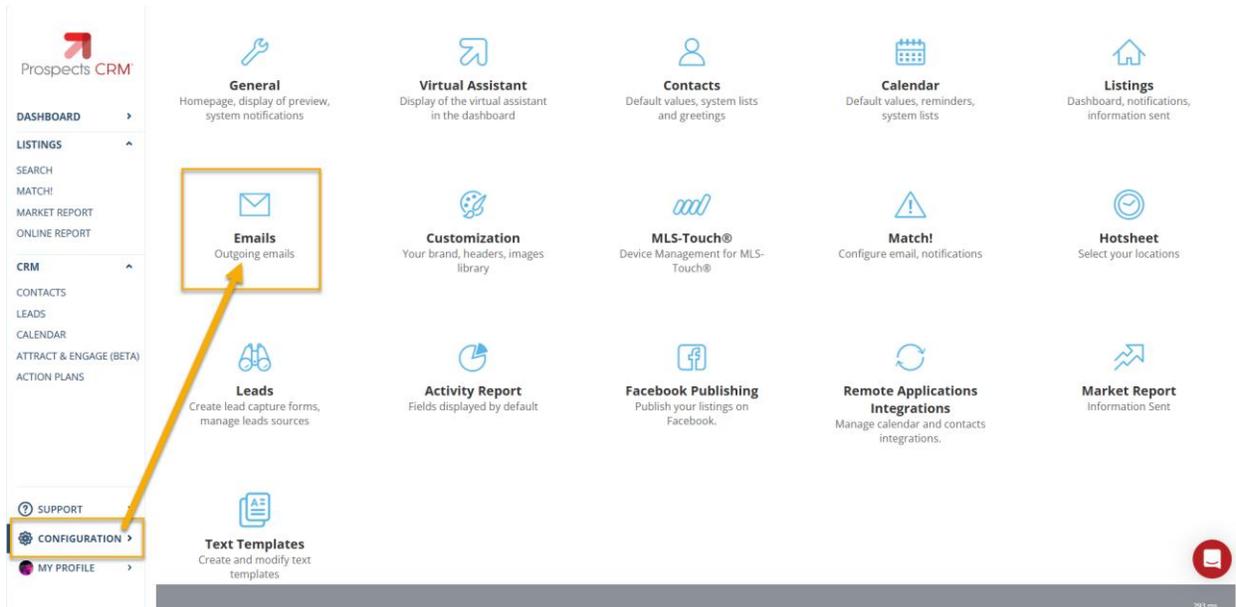
Once the pop-up window opens, click Modify Email Signature to begin the process.
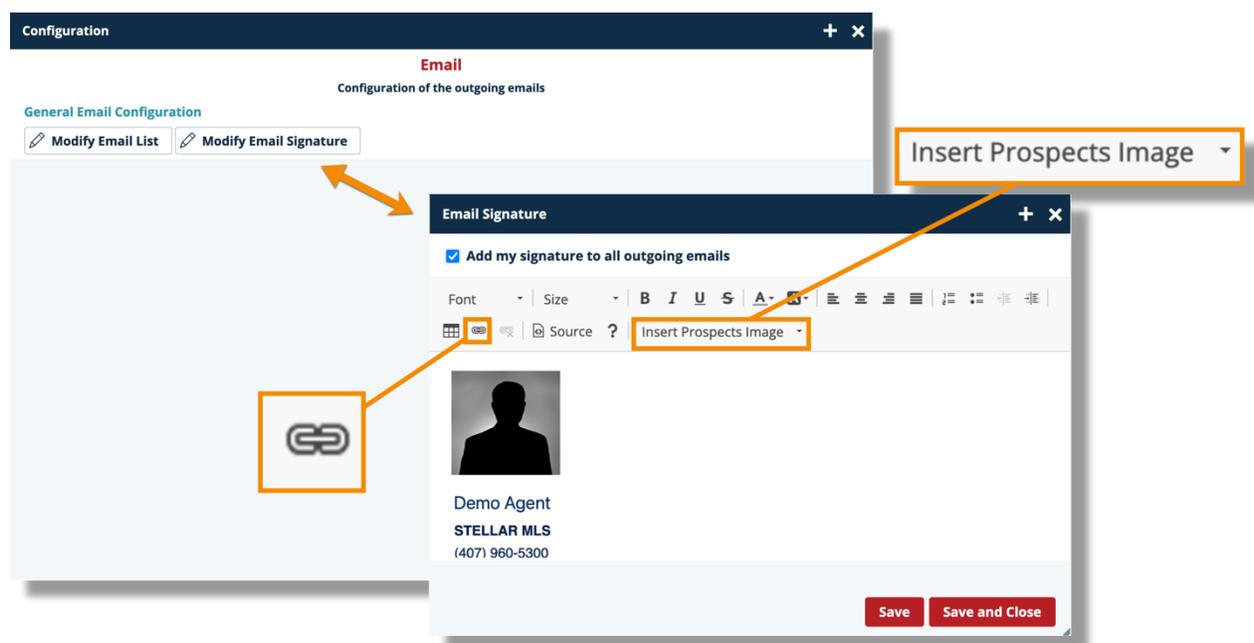
Use the formatting tools located in the first row of the tool bar to change the text entered for your signature. To include an image in your signature, simply choose the Insert Prospects Image option and a drop-down menu will display all images that were uploaded into the Images Library earlier in the Branding section. To add a hyperlink, click the link icon in the second row of the tool bar and fill in the desired fields. When ready, complete the process by clicking the red Save and Close button in the lower-right corner.

Bonus Tip: *Although you have probably already done so, be sure to setup your email signature in the default email program used on your mobile device and computer. This is helpful in case you click certain mailto: hyperlinks and your local email program opens!*

In addition, when emails are sent from Matrix, Prospects CRM, or MLS-Touch, your customer receives those messages from the addresses shown below.

Note that the reply-to address will be your email address, so when a customer responds, their email message will be sent to you!

Emails sent by Matrix will arrive from **STELLAR@stellarmatrix.com**

Emails sent by Prospects CRM or MLS-Touch and will arrive from **623-755852@mlsmailer.com**

As mentioned in the Bonus Tip above, in some situations, email messages may be sent from the default email program on your device so double-check your device-specific settings when you get the chance.

Lead Generation

At this point, we have covered entering and maintaining contacts as well as the intentional integrations between MLS-Touch, Prospects CRM, and OneHome with Matrix that can help

keep you at the center of your transactions and collaborate effectively with your customers. Moreover, you should now have your branding all set up and ready to go.

But what about some ways to generate leads and get those new contacts? As mentioned during this course, there are a wealth of tools and resources associated with your Stellar MLS subscription that can be leveraged to help you seek out new leads. Please be sure to join the Stellar MLS Training Team for the class 'MLS Lead Generation Tools' to learn more but, in the meantime, let's look at resources from two of today's products, MLS-Touch and Prospects CRM, that are (currently) not featured in the MLS Lead Generation Tools class.

MLS-Touch | Brand & Share^{TM}

MLS-Touch offers a mobile app for your customers to access MLS listings as well! Using the Brand & Share feature, you can provide your contacts access to a branded, consumer-version of the app called MLS-Client. To access this option, tap on "Share my Branded App" from the More menu.
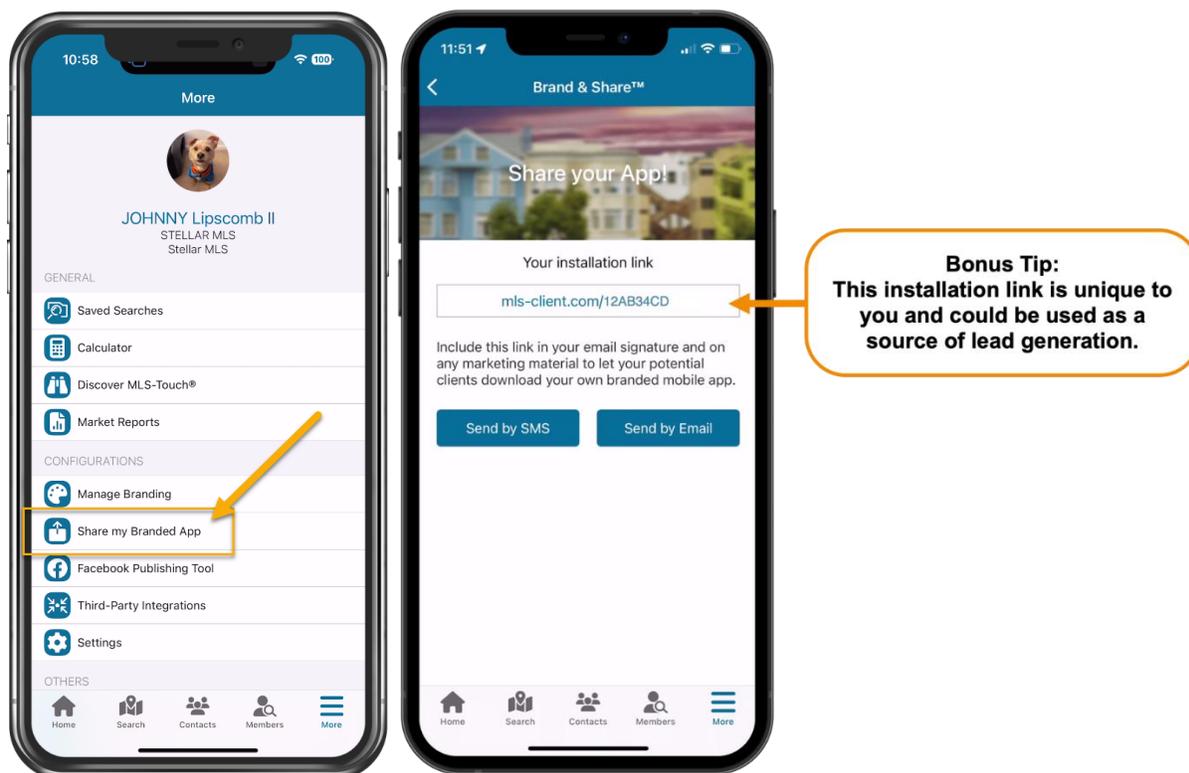
Once the invitation is shared, your customer downloads the MLS-Client app to their mobile device (available for iOS or Android devices) and then uses your unique code to associate the app with you!

In addition to being able to search and view MLS listing data, access mortgage calculators, and learn tips and facts about the buying or selling process, it is also possible to send messages between the MLS-Client app and MLS-Touch using an in-app messaging feature.

Prospects CRM | Market Report

Due to its integration with Matrix, Prospects CRM makes it possible to send your contacts branded Market Reports for a particular area (zip code or city name), category of real estate (residential, vacant land, etc.), and property type. Market Reports are a great way to stay top-of-mind with your customers and prospects!
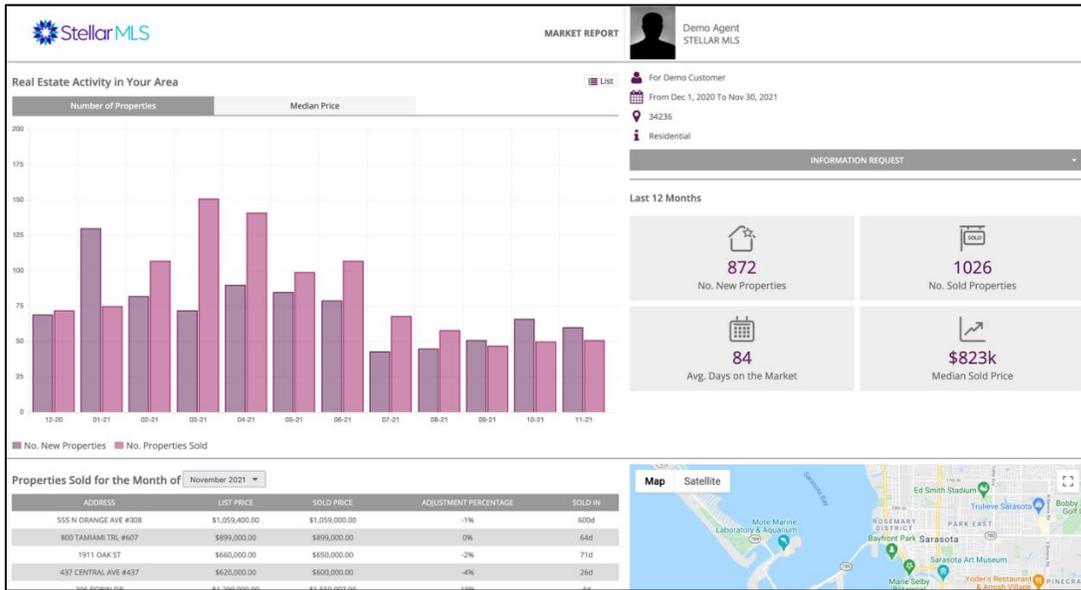
To begin, click the Market Report from the main menu on the left.

To send by email, click the **+ Add** button and then the address book icon to choose a particular contact. In the contact selection, it can be helpful to click on the ALL button to display all of your contacts. Click on the contact and then click on Select at the bottom right.
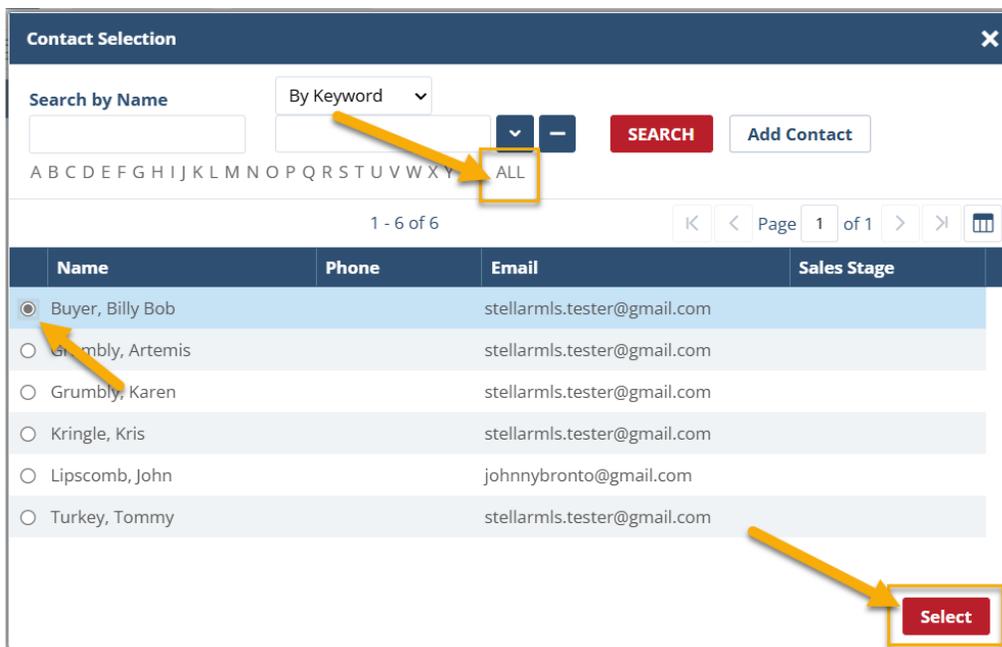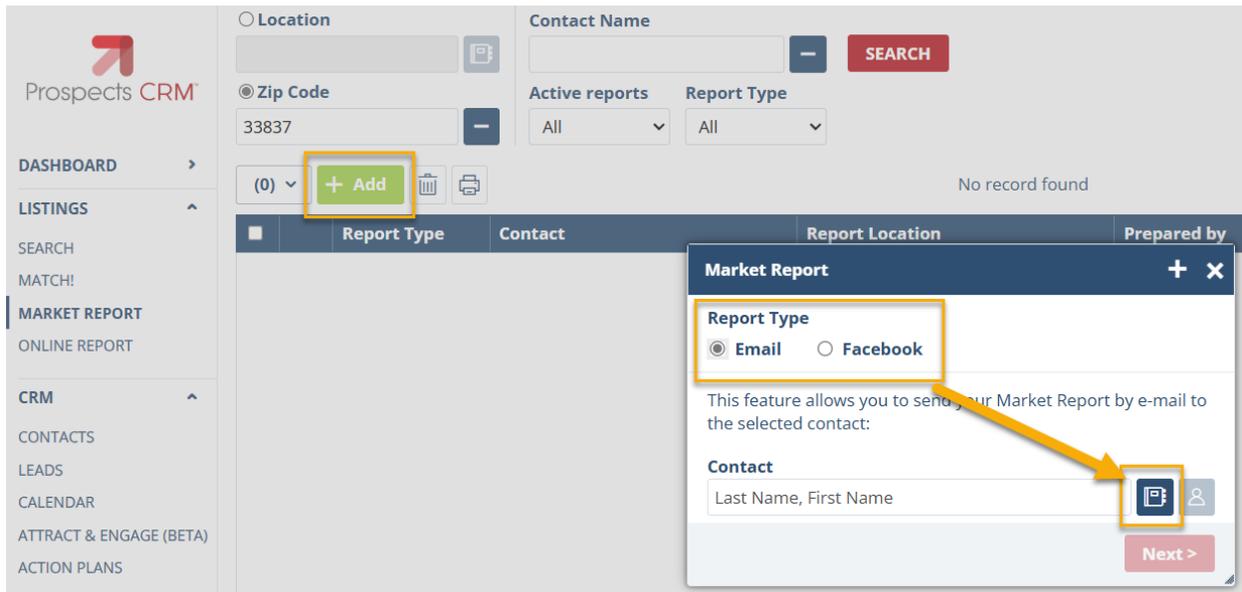
Now that the contact is loaded, click on the NEXT button below.
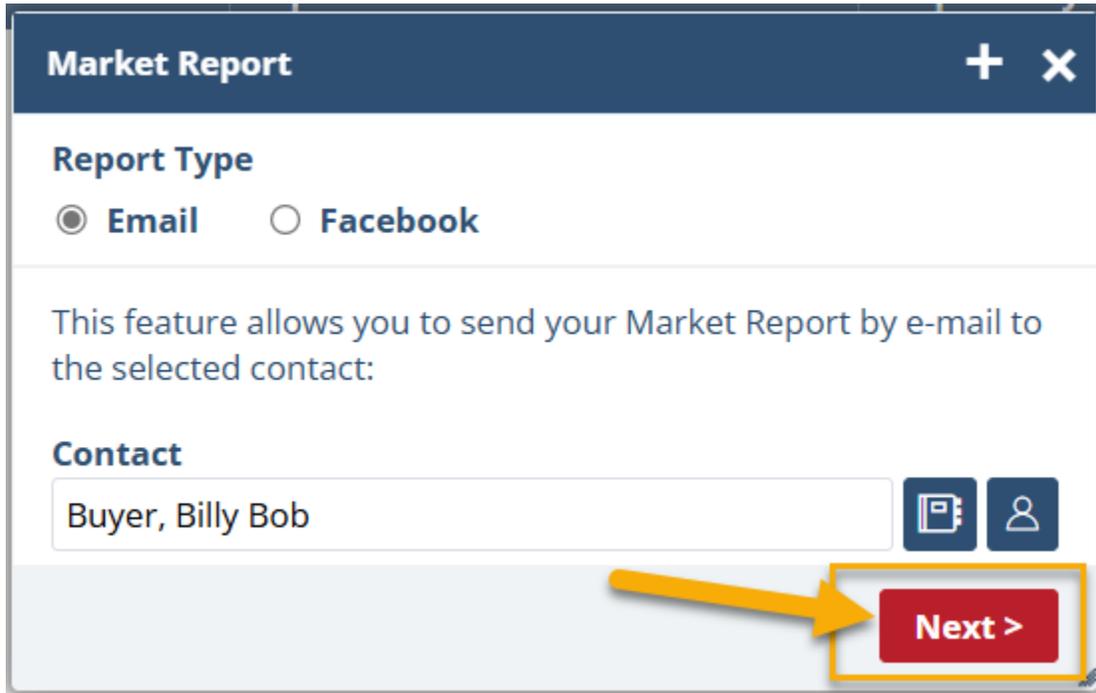
Once complete, a window opens with a variety of options. Choose the frequency (every month or every 3 months), then the area, price range, and category of real estate (and property type when applicable).
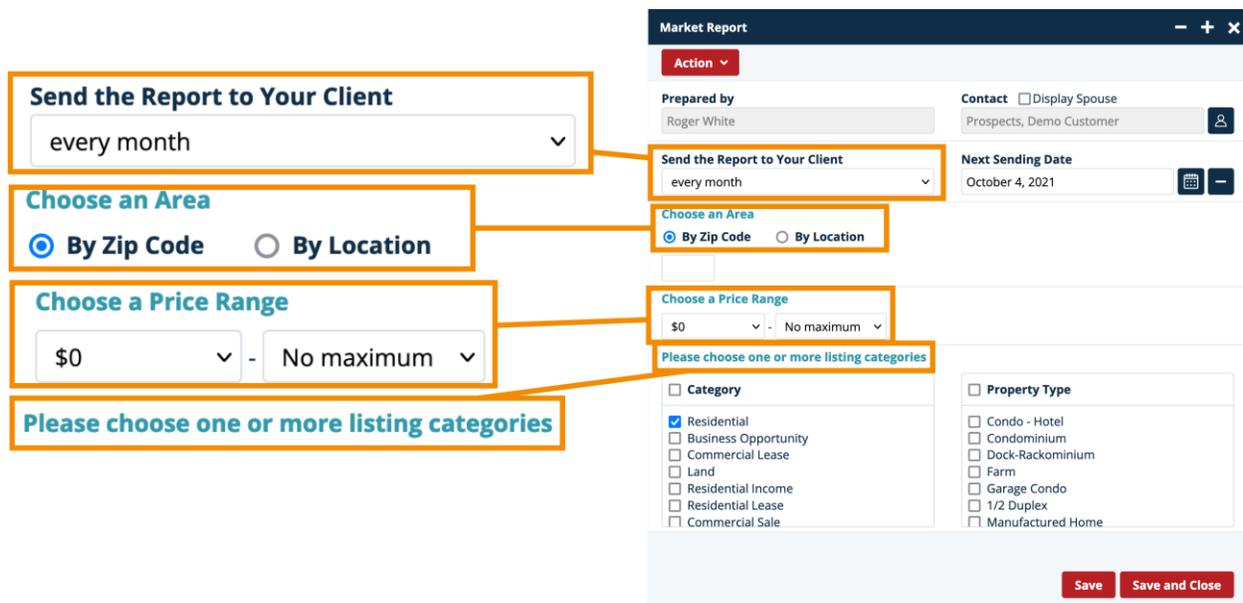
The Action button in the upper-left corner of this window allows you to send a link to the report via email immediately or preview the report in advance.

NOTIFICATIONS

You are undoubtably busy. So, how can you stay up-to-date with the information during your customer's journey as they interact with listings either through OneHome or the consumer-version of MLS-Touch while you are away from the office?

Let's set up some notifications to help make sure that you are in the know…

Matrix

Access the Portal Activity Notification Settings in Matrix by clicking your name in the upper-right corner (1), then Settings from the menu options (2). On the screen that follows, click Portal Notification Settings (3):
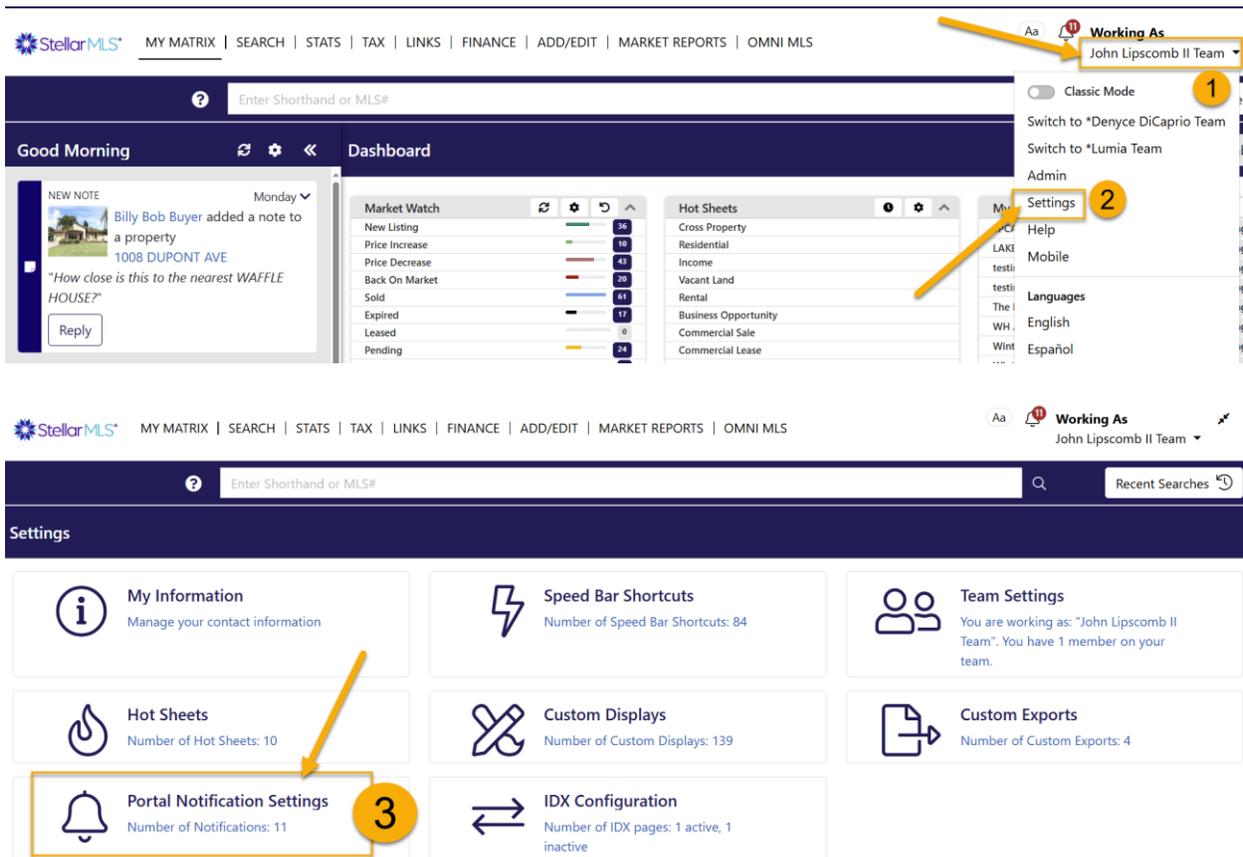
Review the options and choose to be notified by email, text message, or through a daily summary email when your contacts take action in, or visit, the OneHome customer portal. If you select the text message option, enter your mobile number and carrier in the fields provided. Note that text messages arrive once every 10 minutes, so that equates to six (6) times per hour.

The settings here in Matrix are global for all contacts using OneHome and so remember that you can always come back to this page and update your notification settings as needed.

Appendix
MLS-Touch® App Installation

If you have not had the chance to download the MLS-Touch app to your mobile device yet, no problem! When you have time, the setup process is quick and easy!

To get started, download the MLS-Touch® app from either the Apple App Store or Google Play Store and open it on your device.
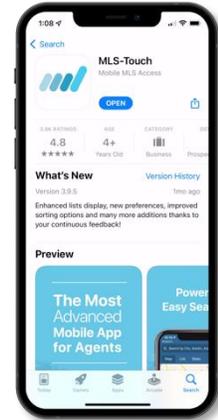
Step 1: Select **Florida** as your state*****
Step 2: Select **Stellar MLS** as your board
Step 3: Sign in to Stellar MLS using your MLS ID and password
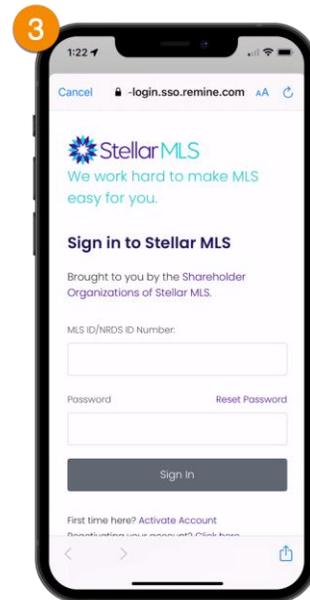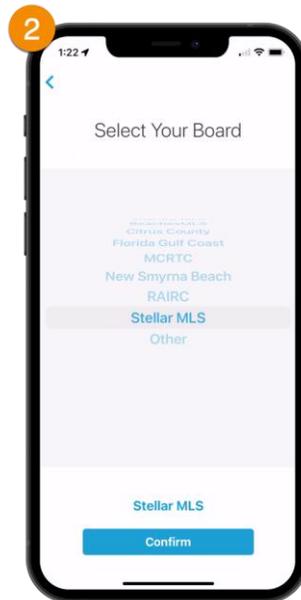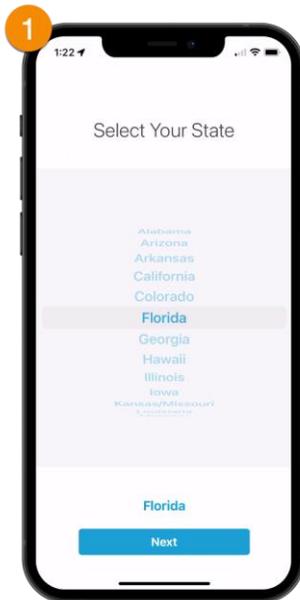
Step 4: Enjoy the app!

***Note:** All Stellar MLS subscribers should select Florida in Step 1, no matter where you may be connecting (e.g. Puerto Rico).*