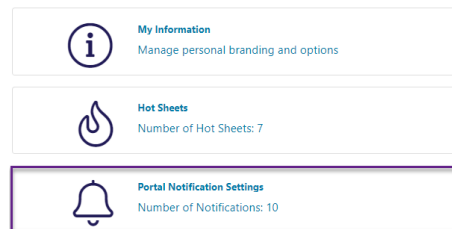


## New Agent Onboarding Checklist for Brokers

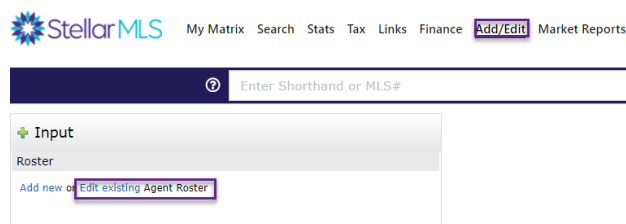
When a new agent joins your brokerage, here are some steps they should take to optimize the use of their MLS subscription.

- ❑ Sign Up for [Required MLS Classes](#) within 60 Days
  - Starting out Stellar
  - MLS Basic
  - MLS Compliance 101
  - MLS Adding & Editing Listings (if agent will be inputting their own listings into the MLS system)
- ❑ Configure **Portal Notification Settings** – Go to Matrix Settings by clicking on agent’s name in the top-right corner of the screen, and then settings. Here, agents can set up “Portal Notification Settings” to be notified by email, text or daily email summary when they email listings to a customer through Matrix and that customer visits their portal to view the listing, save a favorite, save a possibility, discard a listing, or leave a note.

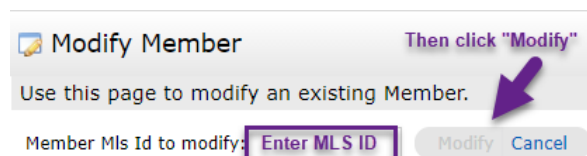
Settings



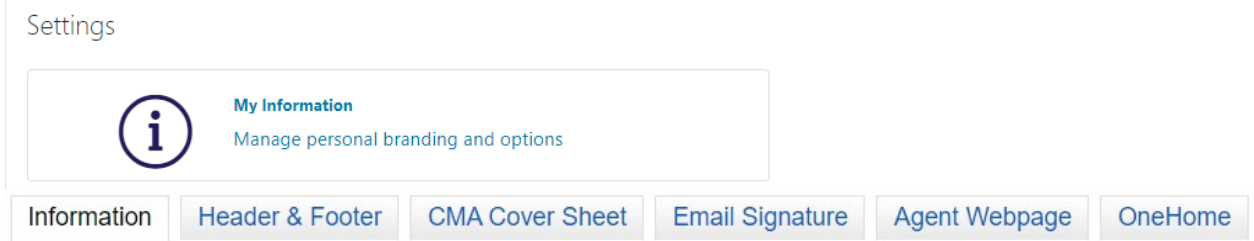
- ❑ Add **Photo to Matrix Directory** - All agents have a profile picture in Matrix, which goes out to the MLS Agent Directory. To add or edit a profile picture, go to the Add/Edit tab and select “Edit Agent Roster.”



Under “Member Mls ID to modify, type in agent ID and click “Modify”. The agent is then able to upload or change a photo.



- Set up **Personalization in Matrix** – Go to Matrix Setting by clicking on agent’s name in the top-right corner of the screen, and then settings. The My Information section offers several personalization options that can be configured. These are described below.



- **Information** – Agent’s name, title, phone, office, email, web site, tagline, etc. can be updated here. Please note that if their name or contact information ever change, they must contact their local Realtor® board in addition to changing it here. The information in this section is only what shows up in the customer portal, not on listings and reports.
- **Header & Footer** – Create a header to show up in the customer portal and on their agent web page. Select from a variety of default headers or upload a custom header. Upload a photo to appear in header. Choose up to five lines of text to appear in header, and set the background color, text color, and transparency level of the background color. Then choose whether or not to include a footer, and if so, choose up to four lines of information to include in the footer along with the footer color scheme.
- **CMA Cover Sheet** – Create a cover sheet for when you develop CMAs through the Matrix CMA wizard. Upload a photo and add contact information.
- **Email Signature** – Create an email signature for when agent emails listings out through Matrix. If the agent would like to add a photo to their email signature, click the image icon. They can either select the image from their CMA Cover Sheet tab, or link to the URL of an image hosted on an external site.
- **Agent Webpage** – A free, basic web page is available through Matrix. To configure this, go to the My Matrix tab and select Information. Then go to the Agent Web Page tab. Agents may want to set up their Header and Portal Profile first. Under the Agent Web Page tab, agents will have the opportunity to enable their web page, see the URL, add home page content, set up their search form preferences, and include a sign-up sheet to the page. Note that an agent can forward a domain that you own to this web site.
- **OneHome** – Upload photo and contact information to appear in consumer-facing OneHome portal. Update the greeting that appears in the OneHome Agent Profile.

- **Set up Branding for OneHome and MLS Touch -**


An agent can customize branding for Matrix emails, OneHome, and MLS Touch by clicking on the arrow by their name on the corner of Matrix, and then “Manage Branding”.

Here they can add their logo and customize a color scheme. Additionally, some corporate franchises already have brand templates that can be applied.

### Create Your Own Brand Kit

Build your own Brand Kit to represent your personal brand across our products.

- Start with a logo**  
Recommended 525x150 pixels, 10MB maximum file size.



Edit
Remove
- Choose your colors**  
Primary color will be applied to banners and headers, Secondary color is for elements such as buttons, and accents are for smaller details.

Primary

Change

Secondary

Change


Accent

Change
- Review the Brand Kit.**  
If everything looks good save it to make it active across all your products.

Reset
Cancel
Save & Activate

### Available Brand Kits

Choose from pre-made Brand Kits or search for more brands.


Unbranded

Choose from additional brands

Search by name

- Download and Share the MLS Touch App** - For the MLS Touch app, agents should download the app and login with their MLS credentials. Then, from the “More” menu option on the bottom, go to “Brand and Share” to access a link to share with consumers. *(Note: Branding can be updated here, or from the Brand Manager in Matrix described above.)*



**Bonus Tip:** Agents should add [listingdatachecker@corelogic.com](mailto:listingdatachecker@corelogic.com) to their contact list to ensure important emails about potential listing violations deliver to their inbox instead of their junk folder. This will help avoid costly fees and ensure their listing data is up to date in the system!