Matrix Team Functions - Working in Teams

Many agents work as part of a real estate team, which is why Matrix now has a Team Function. Teams can consist of groups or two agents taking care of each other's clients while on vacation. There are many different versions of teams. The Matrix Teams functionality makes it possible to add other agents to a team, and also make it possible for another agent to add you to their team.

Agents (or their assistants) may work on behalf of another agent. It is also possible to impersonate another agent. **Matrix will only allow you to add others to your team who have an Active Matrix ID on the system.**

Impersonate Another Agent
If an agent you work with added you to her team in Matrix and set you up to impersonate her, you would be able to do the following things:
• Emails sent from Matrix would be sent from her name and email address, and would use her email banner and footer (if she had chosen one) and email signature.
• Print reports – any reports that are printed while impersonating another agent will have the information of the agent being impersonated in the "Courtesy of" information. In other words, the report will look as if it were printed by the agent that you are impersonating.
• Access another agent's Matrix Contacts, Saved Searches (you cannot change her team settings) When you send an email from Matrix while you are impersonating another agent, the name and email address in the "From" line will be highlighted in yellow. This is to call attention to the fact that you are sending that email as that agent. This means that to the client, the email will look exactly as if it came from the agent being impersonated.

Working on Behalf of Another Agent
If an agent you work with added you to his team in Matrix and set you up to work on behalf of him, you would be able to do the following things while working on behalf of him in Matrix:
• Emails sent from Matrix would be sent from your name and email address on his behalf, and would use your email banner and footer (if you have chosen one) and email signature.
• Print reports - any reports that you print while working on behalf of another agent will indicate that they were printed by you on behalf of the other agent.
• Access his Matrix Contacts, Saved Searches (you cannot change his team settings)

Adding Other Agents as Your Team Members
Each Matrix user that is added to your team will have full access to your Matrix account and can either "impersonate" you or "work on your behalf," depending on the type of access you grant them.

How to set up a team
Click the My Matrix Tab, then the "Settings" link. At the bottom of the My Settings screen, you will find the Team Settings section. Click the link labelled "Click here to create a Team" and then again on the next screen.
Type in the agent ID for the agent you want to add to your team. If you do not know the ID, you can find it through an Agent Roster search (Roster tab).
Select whether you want this colleague to Impersonate you or Work on Behalf of you. Click the "Add" button.

After adding your first team member, you will come to the main Team Settings screen shown above.
Here you can control the following:
• Add additional team members (click the link "Click here to add a team member and/or someone that can work as you.")
• Delete team members or edit their impersonate/work on behalf status.
• Name your team (optional). Be sure to click the "Save" button after typing in your name.
• Set yourself up to either impersonate or work on behalf of the team.
• Allow team members the option of switching between their own names and the Team name when printing and emailing to Team Contacts. Be sure to click the "Save" button after checking or un-checking this box.
• Disable the team function.

After enabling the Team function, you will be alerted to it on the Home page each time you log in: A link is included to go straight to the Team Settings screen.

When one of your team members logs in, they can switch from their own individual login to the Team login by clicking on their name in the upper right corner of the screen to open the select popup. There he can click to select the team name (or your name if you did not create a team name).

They can now see in the upper right (and highlighted in yellow on the Home page) that they are working as the team. When they click on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to your (the Team's) items. When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone:
If they are set to impersonate you, they haves the same choice except that if they select the Team, it will use your email address, not theirs.

To leave working as the team and go back to working as yourself, click the "Working as" link in the upper right of the screen and click to select your own name.