Common Data Platform

Add a Team

1. To add a team (for which you will be the team owner), click on "Teams" on the menu at the top of the Add/Edit screen.

2. You are now in the Roster application where Teams are managed. Click on the "+" sign on the right side of the grey Teams banner.

3. **Team Name, Activate, Use in Matrix and Description**. Type in the name of your Team. This is what will appear on MLS reports when you or team members are working as the team. Select "Yes" under "Active" if you want to activate the team now. Indicate whether you want to use this Team in the Matrix MLS. Note that at this time, only one team per Team Owner may be used in Matrix at one time. Optionally, you may also enter a description for the team.

4. **Team Owner**. Click the wrench icon to set-up the Team Owner.

Can edit team Listings? Defaults to "Yes." If you do not want this as the Team Owner, you may change it to "No."

The three buttons at the bottom are in reference to the Matrix MLS system teams functionality. Set whether you (the Team Owner), "Works on Behalf" or "Impersonates" the Team.

Work on Behalf: Emails you send from Matrix would be sent from "On behalf of (team name)," with your email header/footer and email signature. As with Impersonate, any reports you print will have your information in the "Courtesy of" section. With this setting, you do not have the option to allow team members to switch between their own name and the team's name.

Impersonate: Emails you send from Matrix will be sent from your name and email address, and will use your email header and footer (if you have chosen them), and your email signature. If you click the checkbox to allow team members the choice of switching between their own name and the team's name, then you will also have that option. Any reports you print will have your information in the "Courtesy of" section.

Neither: Select this only if you do not use the Matrix MLS system.

5. **Add Team Members:** In the Members section, click the link "Add Team Member."

Members

a. Start typing the team member's name or MLS ID and select the person's name as it appears in the drop-down.

b. Select whether the team member may edit team listings in Add/Edit (team member must have at least Agent-Edit or Agent-Edit-Limited permissions assigned by broker).

c. Select whether they will Impersonate or Work on Behalf of the team (or Neither if they do not use the Matrix MLS system).

d. Repeat process for each team member you want to add.

6. **Save Team**. Click the "Save" button in the upper right corner of the screen. We encourage you to click this button throughout the Team set-up process so that you do not lose your work.
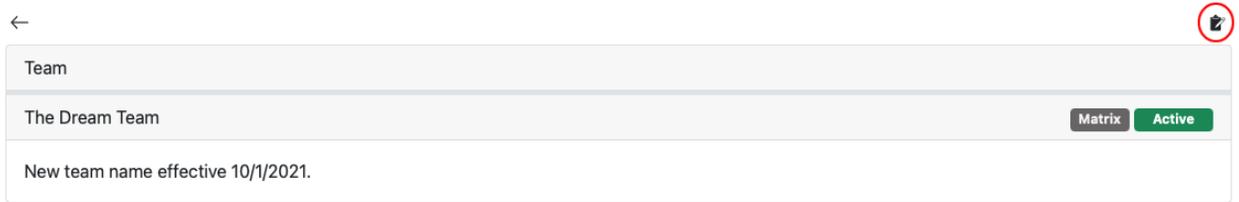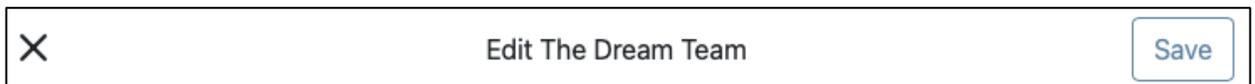

Activate/Inactivate a Team

From your Teams list, ensure the Status Filter is set to allow you to view Active or Inactive Teams, depending on which you want to work with. Or you may view both Active and Inactive Teams by clicking the Funnel icon on the right side of the grey title bar and selecting "Clear Filters" from the Filters drop-down menu.

1. Click the row of the Team you want to Activate/Deactivate.

2. Click the Clipboard icon to edit the Team.

←	📝
Team	
The Dream Team	Matrix Active
New team name effective 10/1/2021.	

3. Under "Active," click "Yes" to Activate or "No" to Deactivate.

4. Click the "Save" button at the top right of the screen.

✕	Edit The Dream Team	Save

Edit a Team

1. Click the row of the Team you want to Edit.

2. Click the Clipboard icon to edit the Team.

←	📝
Team	
The Dream Team	Matrix Active
New team name effective 10/1/2021.	

3. Make any desired changes in the top section (Team Name, Activate/Inactivate, Use in Matrix and Description.

4. To make changes to the Owner section, click the Wrench icon next to the Owner name.

Owner

👤 502020551 Thomas Flaherty, Esq.	🔧
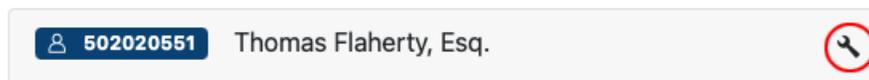
5. To edit a Team Member, click the Wrench icon next to the member's name. To delete a member, click the trash can icon next to the member's name.

6. After completing your edits, click the Save button in the upper right corner.
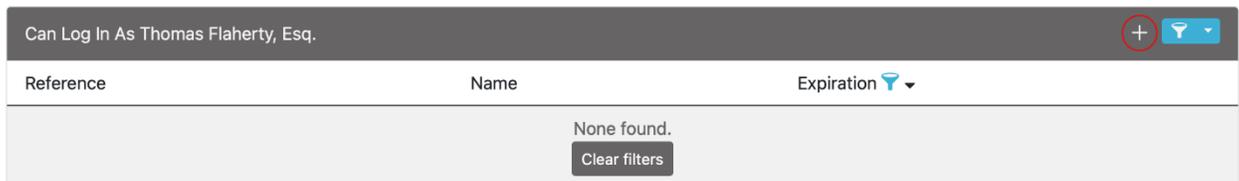

Login As

You may authorize other Add/Edit users to log in as you to the Add/Edit system and work on your behalf. This temporary permission lasts 30 days unless you remove it sooner or extend it. This is especially helpful when you plan to be away on vacation.

Click on "Teams" on the menu at the top of the Add/Edit screen.
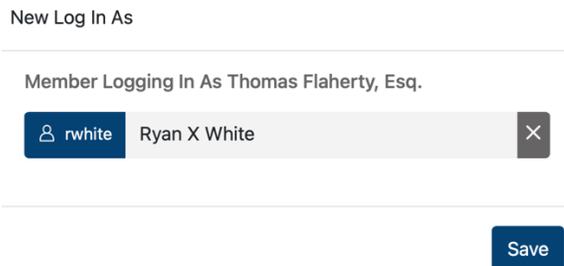

Assign Login

Click the plus sign on the right side of the "Can Log In As" grey title bar.

In the pop-up box, start typing the agent's name or NRDS ID in the box provided. When you see the person you want in the dropdown, make the selection. Click the blue Save button.

Extend Login

To extend a login as permission beyond the first 30 days, click the "Renew" arrows icon on the person's row on the summary screen. This will extend the login as the period to 30 days from today's date.

Can Log In As Thomas Flaherty, Esq.		+ ⛢
Reference	**Name**	**Expiration** ▾
		No range selected 🖉
👤 hveer	Hannah Veer	Nov 13, 2021 🗑 🔄
👤 rwhite	Ryan X White	Oct 14, 2021 **Expired** 🔄

Remove Login

To remove the login as permission you have assigned to a person, click the trash can icon on the person's row on the summary screen. Their Login As permission will then show as Expired.

Need Help?

If you have questions not covered in this guide, you may contact our Help Desk M-F, 8:00 to 5:00 at help@northstarmls.com or 651-251-5456 (1-877-251-5455 toll free).