Modern Solutions. Intentionally Integrated.

Streamline your business, optimize your branding, capture leads, enhance relationships, and stay connected with your customers and prospects while keeping YOU at the center of your transactions!

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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!
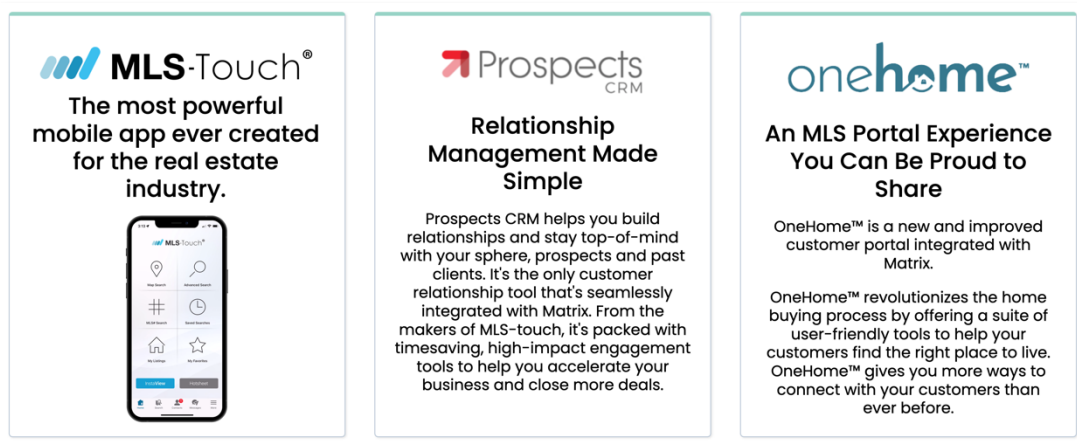
This class will progress through several areas of focus including:

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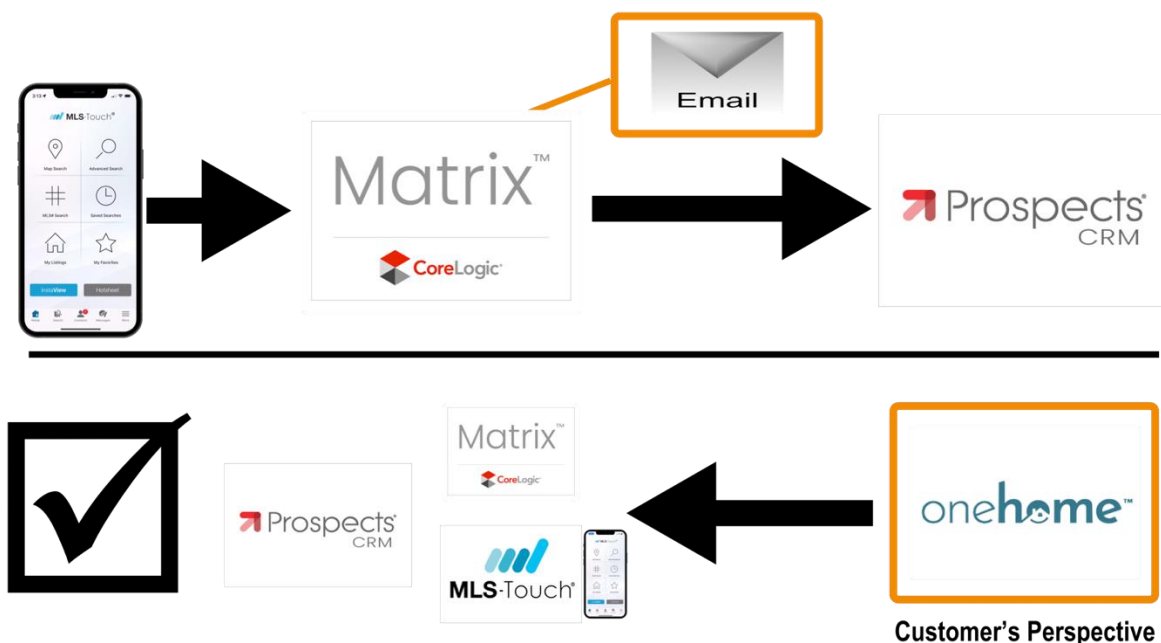
Illustrated in the graphic above, here are the steps of the customer workflow example demonstrated in class that moved between both an agent and customer's perspective.

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):

Company Logo Notes (3):

> Using MLS-Touch, a logo can be selected from the album/gallery of your mobile device

> Recommended size is 400x100 pixels

Brand Color Notes (4):

> You may customize three brand color options including Primary, Accent, and Variant

> Click the icon to manually enter color values for each option or adjust the color in a display area.

Once complete, tap the button labeled "Apply colors and logo" (5). The above settings will then customize MLS-Touch and, in turn, the MLS-Client mobile app (discussed later), as well as Prospects CRM and OneHome.

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

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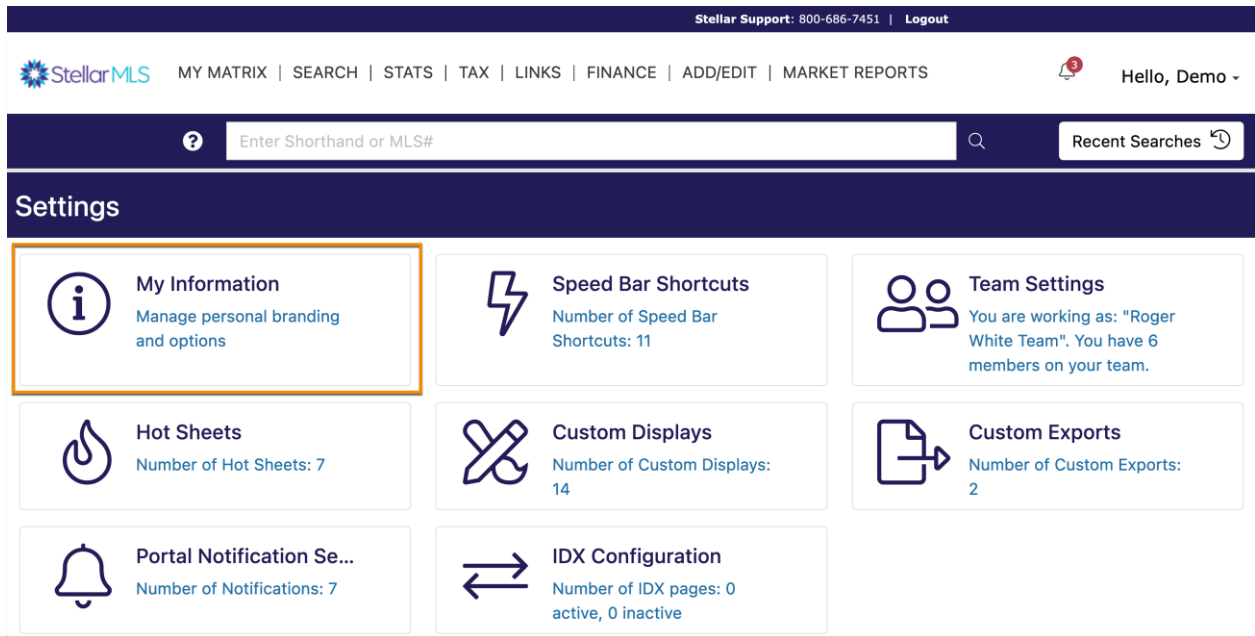
To display your agent photo across the systems, upload (or confirm) your agent photo in **two** places:

1. **Matrix**

Click Your Name in the upper-right corner of Matrix then select Settings.
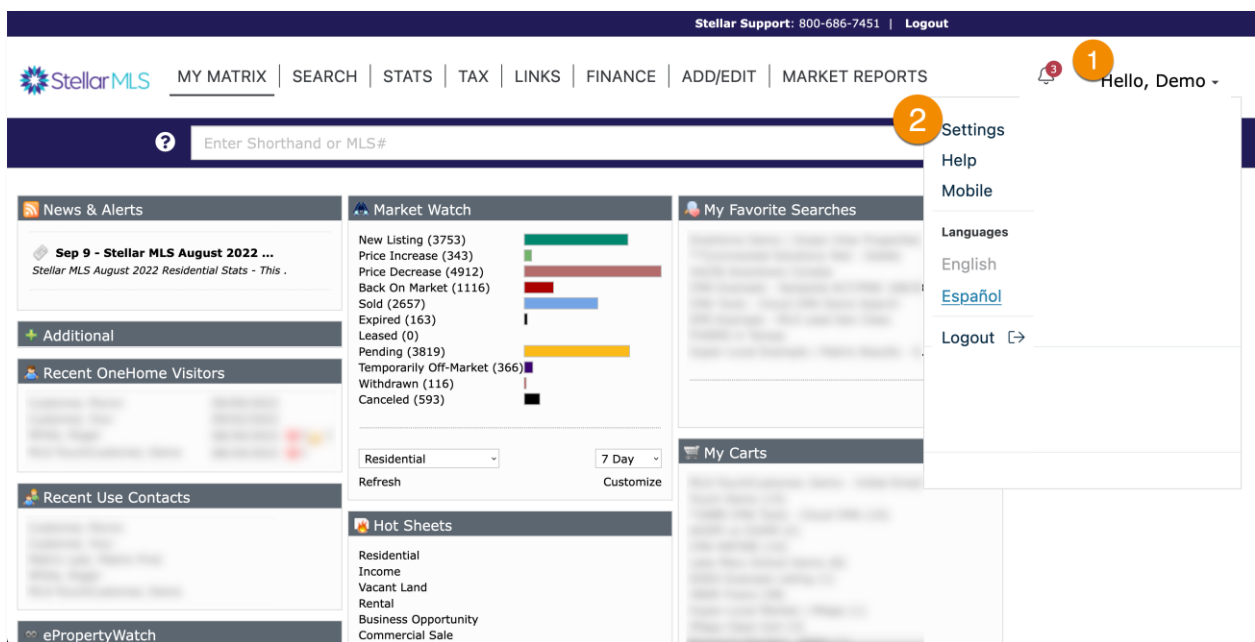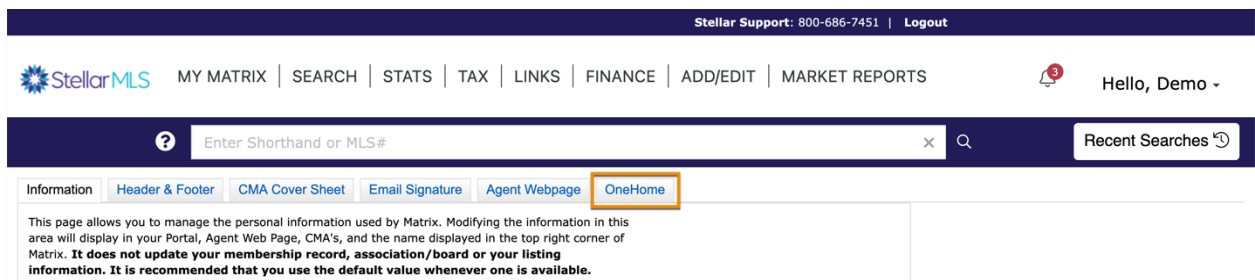
On the next page, click the My Information section:

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.
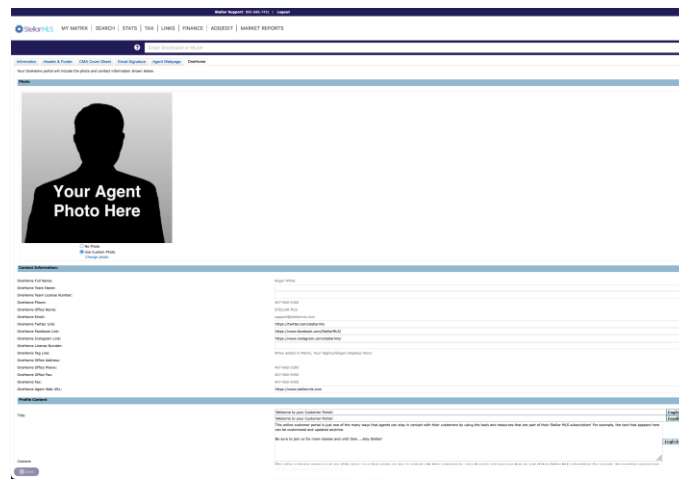
Begin by adding your agent photo. Once saved, this will be shown throughout the OneHome customer portal. Continue through the contact information section and add social media links, your website URL, and adjust the Profile Content section to change the custom text message mentioned above. Lastly, if 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.

2. **Prospects CRM**

Click the gear icon in the upper-right corner of Prospects CRM to access the Configuration page:
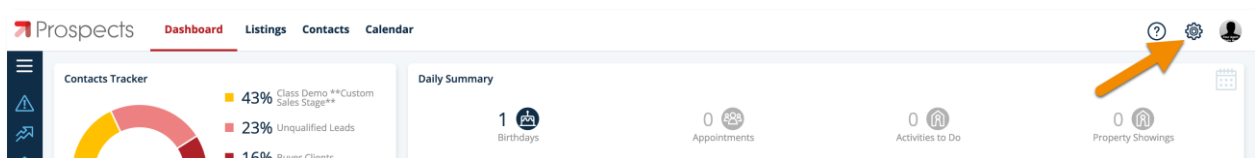
Then select the Customization option (the icon of an artist's palette):
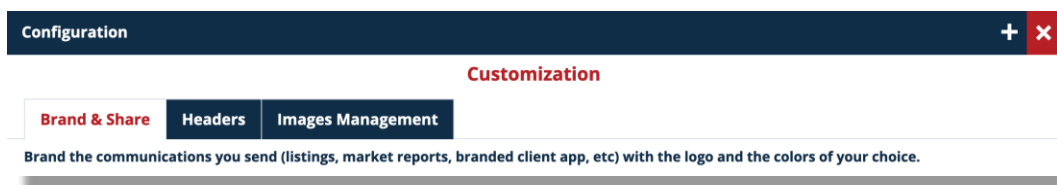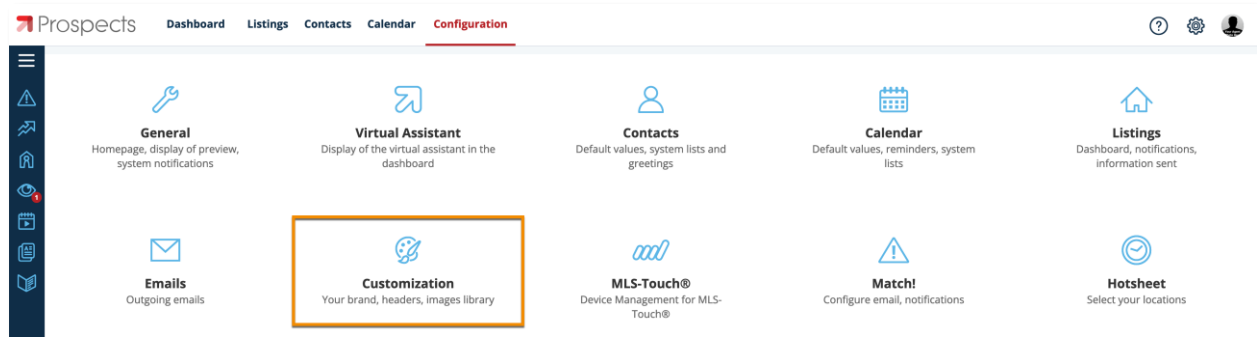
Upload your photo on the Images Management tab. The photo selected here appears in various Prospects CRM communications as well as the MLS-Touch mobile app. You may also upload images to the Prospects CRM Images Library from this window.
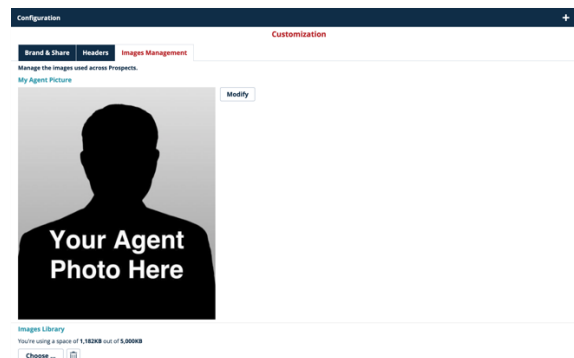
To confirm your contact info and the photo to appear in headers of certain Prospect CRM displays and reports, begin by clicking the Headers tab followed by double-clicking the default header in the Description list to open the Header pop-up window. Review and make changes as necessary. *Please note that if you uncheck 'Use my board info' and make changes, it will not update the information on file with your Board/Association.*
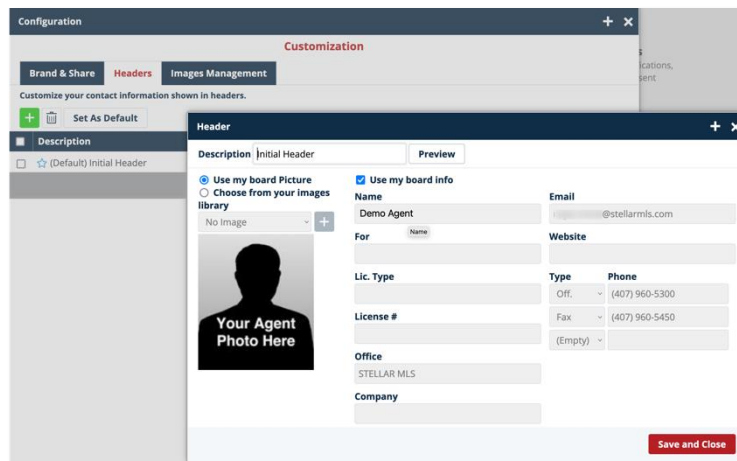
Lastly, move to the Brand & Share tab. Notice that your company logo and brand colors are already shown on the Brand & Share tab if you set up that information in the MLS-Touch mobile app previously.
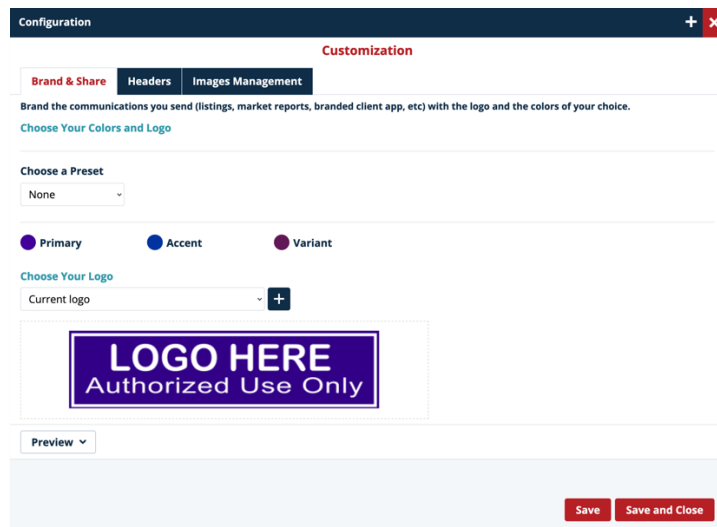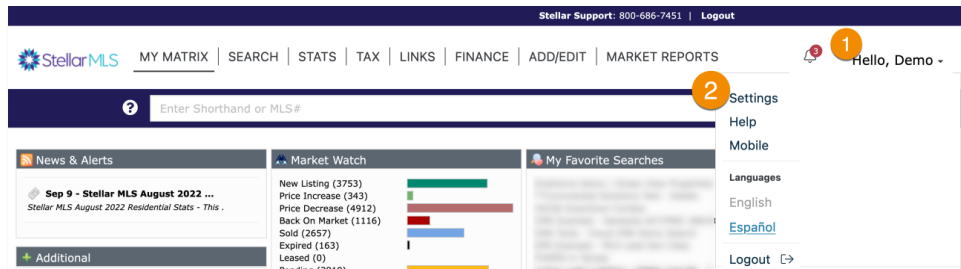

Email Signature

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.
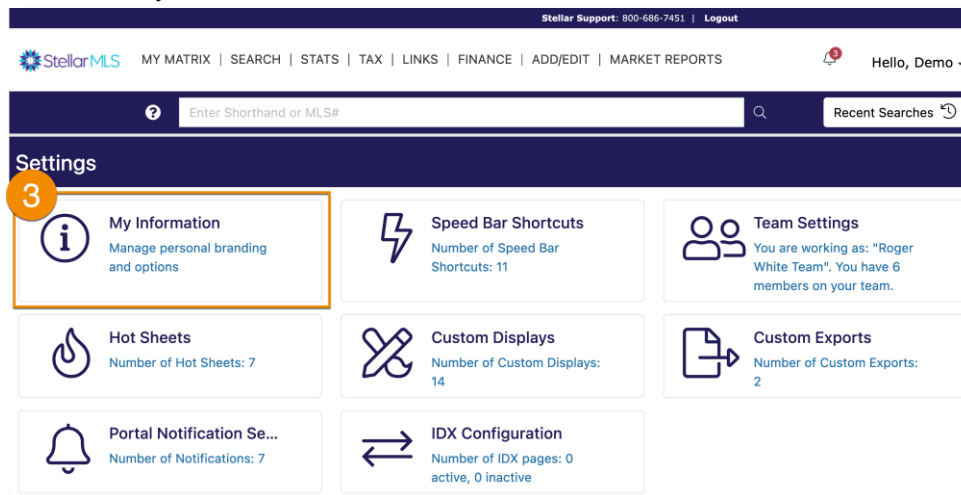
Matrix
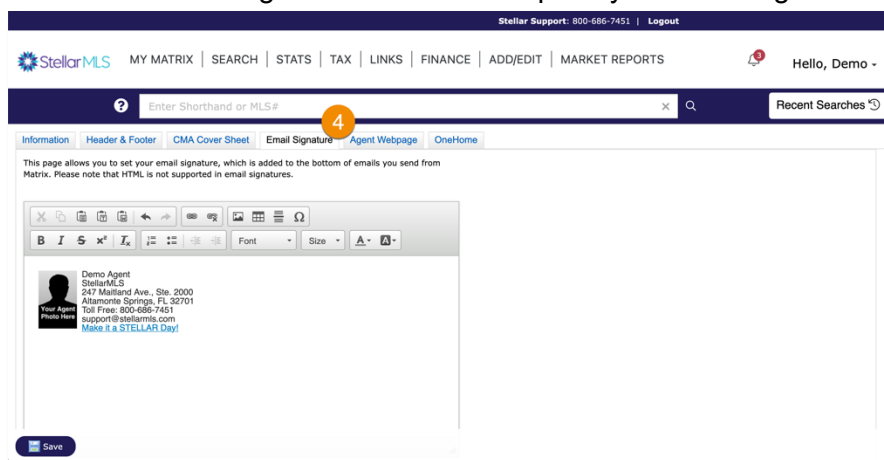1. Click on your name in upper-right corner of Matrix

**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.
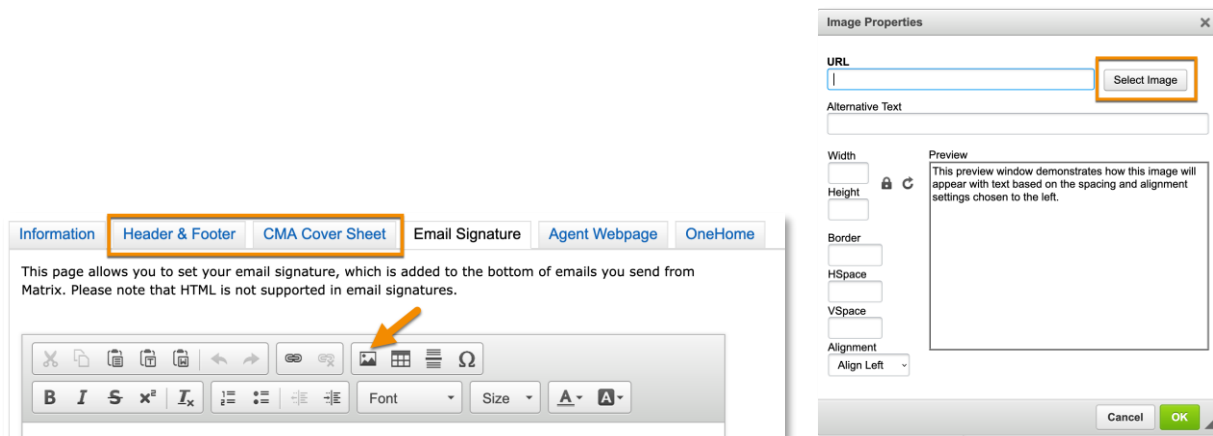
Prospects CRM

1. Click the gear icon in upper-right corner of Prospects CRM to open the Configuration page
2. Select 'Emails'
3. Click the button labeled "Modify Email Signature"
4. Complete your email signature as desired
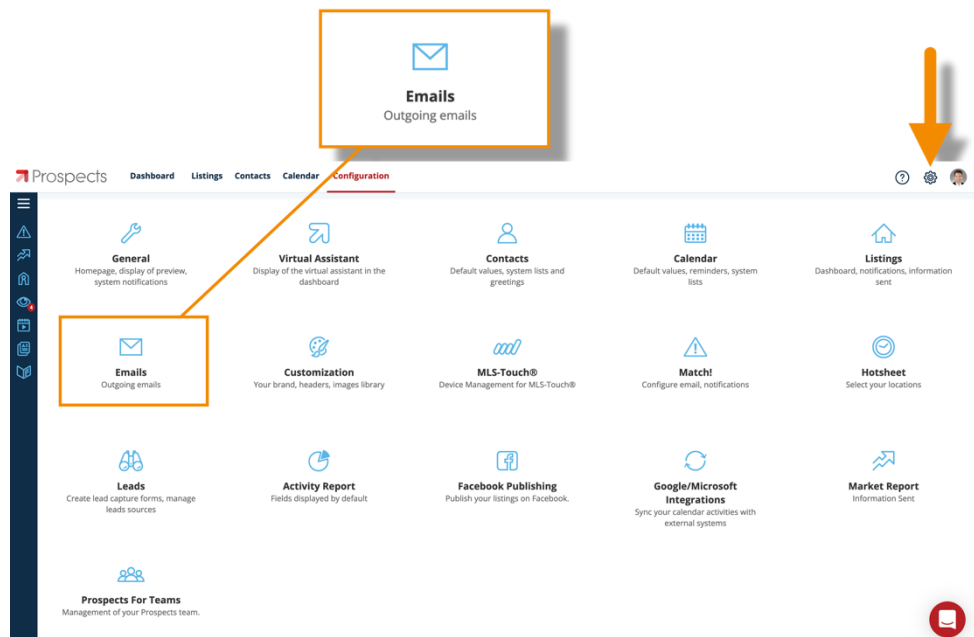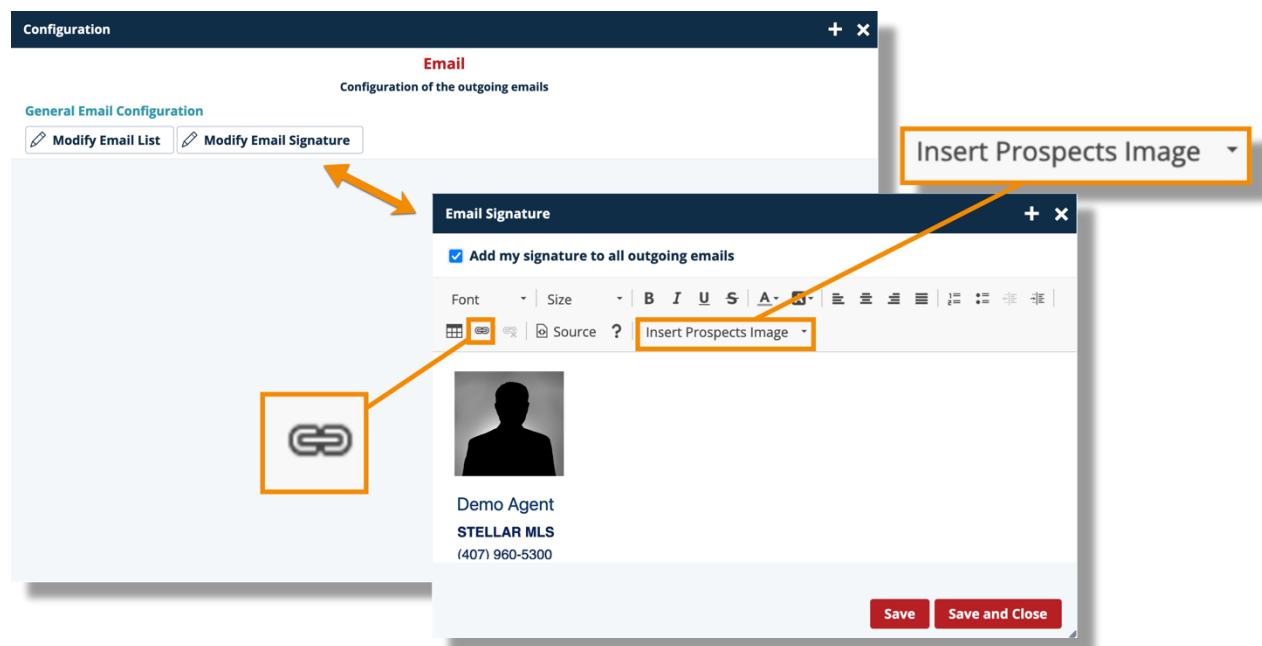
Use the formatting tools located in the first row of the tool bar to change the text entered for your signature. To include an image in your signature, simply choose the Insert Prospects Image option and a drop-down menu will display all images that were uploaded into the Images Library in the previous 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™

The Brand & Share feature allows you to provide your customers and prospects with a consumer version of the MLS-Touch app called MLS-Client that they can download and use on their mobile device.

Although invitations to download the app can be sent to a customer directly, consider sharing a link to your branded MLS-Client app out on your social media channels or perhaps add it to your email signature! When someone downloads the MLS-Client mobile app and uses your unique code, you will be sent a lead notification to act on! Because you already branded the MLS-Touch app earlier, you are all set.

To locate your unique link and installation code, open the MLS-Touch app on your mobile device and tap the 'More' option in the lower-right of the display (1) and then select "Brand & Share™" (2). With your branding in place, simply tap the button labeled "Share my App" on the next screen (3) and a page opens displaying your unique installation code (4)!
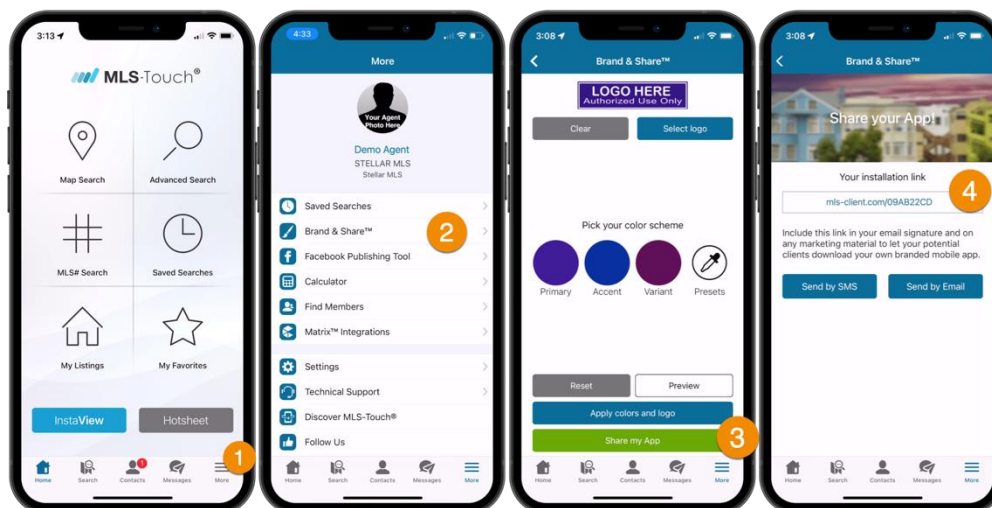
Two notes about the Brand & Share feature:

- If an invitation is sent by clicking the button labeled 'Send by Email' shown above, the recipient email address can be manually entered or selected from any contact you have in your phone's address book. If you open a contact in MLS-Touch however, the email address is prepopulated from your MLS-Touch Contacts database.

- The email invitation to download MLS-Client is sent from your default email application on your mobile device, not MLS-Touch. So, as mentioned in the previous section, be sure to review your settings on your mobile device before tapping the send icon to make sure you are using your preferred email account (and its signature).
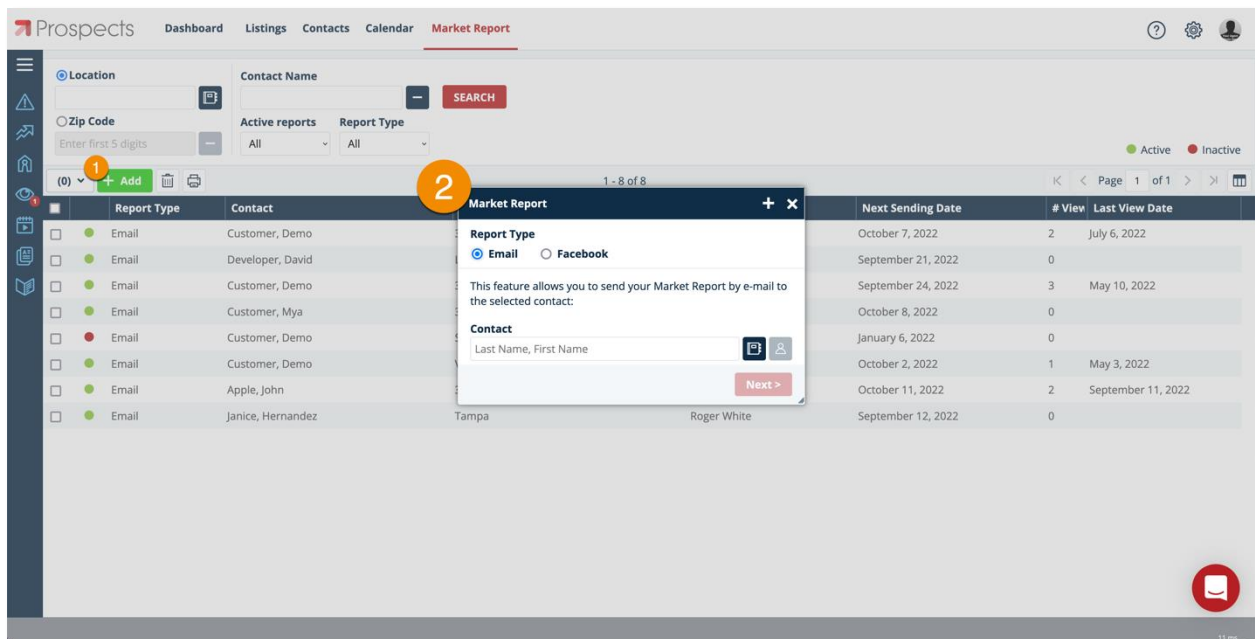
Prospects CRM | Market Report

The ability to access Matrix listing data in Prospects CRM has many advantages. During the live class, recall that we demonstrated how to associate a listing (or listings) with a contact record (or records!), to help keep you connected with everyone involved with a particular listing or transaction. However, we also showcased the Prospects CRM Market Report feature that can be used to leverage Matrix integrations as well.

Market Reports can help you stay top-of-mind with your customers and can be automatically emailed to a particular contact every month or every three months. However, you can also publish Market Reports on your Facebook business page to generate leads and help position yourself as a market expert in your area and even add a request form to your own website.

Access Market Reports along the left column of Prospects CRM. Click the arrow icon directly or the three-line icon at the top of the column to expand out the view, then 'Market Reports'.
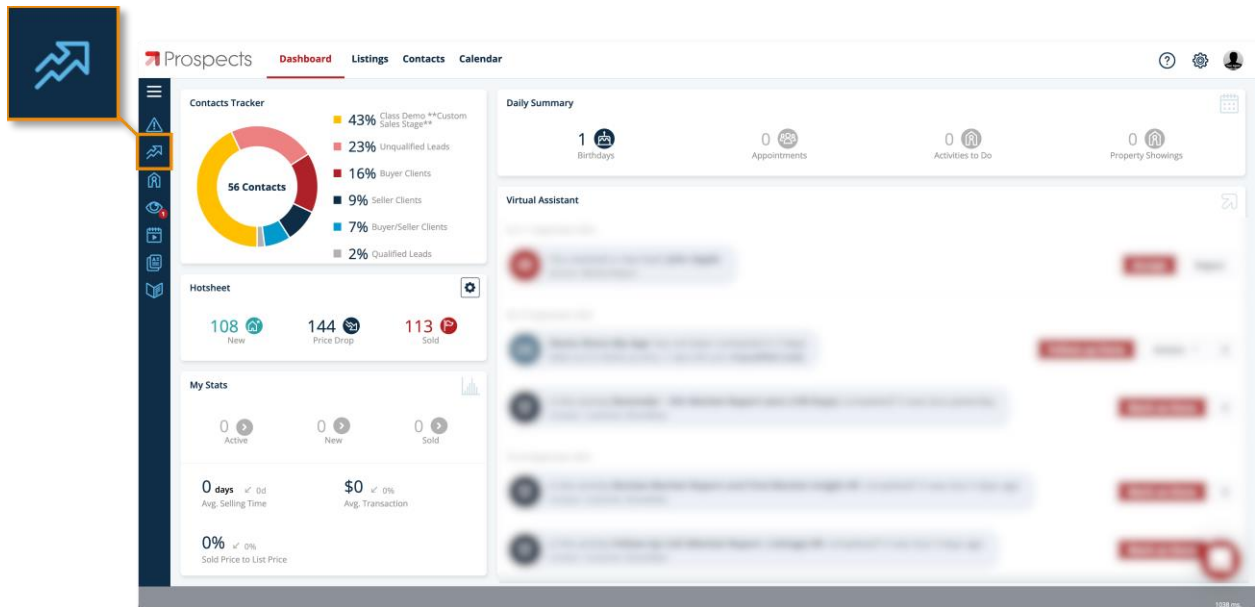
On the Market Reports screen, (1) click the ➕ **Add** button and then choose if you would like to send a report via email or publish to your Facebook business page in the pop-up window (2).

There are a variety of options available to tailor Market Reports in Prospects CRM. Below is an image of setting up a report that will be emailed to a contact every month. Notice that reports can be based on city names ("By Location") or a zip code and then further defined by price range, category, and property type. Simply make your selections and then click the Save and Close button. To view an example report, click the Action button in the upper-left of the window and select 'Preview' from the available options.

Going back a step, if you would like to publish a Market Report to your Facebook business page and have not connected Facebook with Prospects CRM, you may do so by returning to the Configuration page. As shown in the graphic below, click the gear icon near the upper-right corner of the screen (1) to return to the Configuration screen and select Facebook Publishing settings (2).
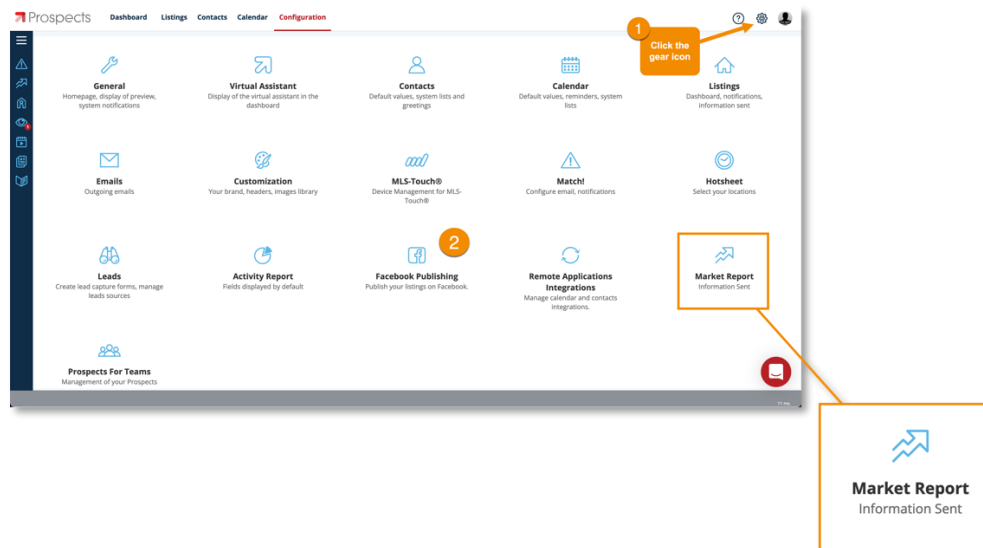
While on the Configuration screen, you also have the option to customize some other settings for Market Reports. Just click the Market Report icon to open the settings window.
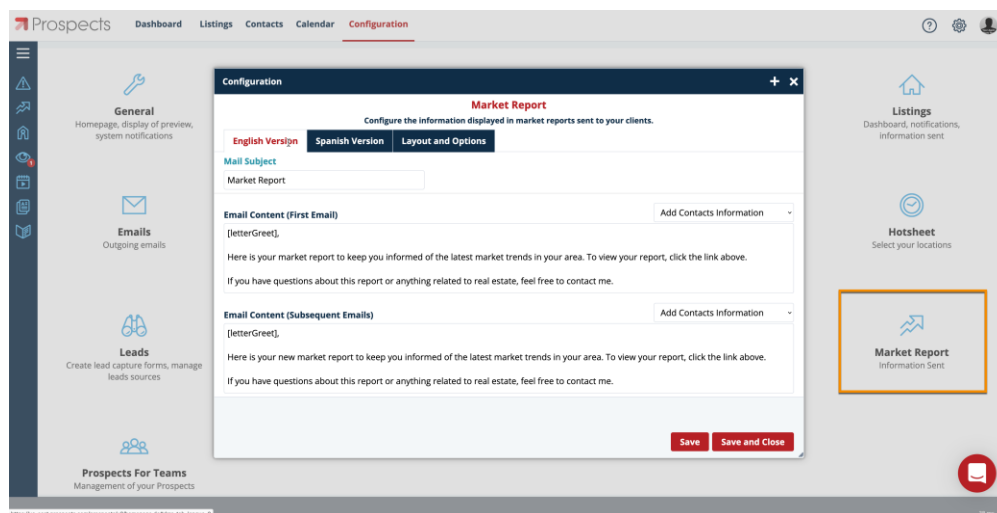

Here you can change the email subject line as well as the message body when sending out reports. Notice there are two tabs, one for an English version and one for Spanish. Prospects CRM will send out the Market Report based on your contact's language preference set in their contact record!

Now in addition to emailing reports and publishing to your Facebook business page, there is another fantastic feature of Market Reports that can help you capture leads – right from your own website!

If you have a customizable website for your business, look on the Layout and Options tab, and in the Lead Capture Form section, you (or your webmaster) can get instructions on how to add a Market Report request form on your website! There is some setup involved, but getting the instructions could not be easier - just click the button labeled "Send the instructions to my webmaster". When you a request form is completed, you can receive a notification by email, as well as in both Prospects CRM and MLS-Touch for you to take action on!

Also available on the Layout and Options tab, you may choose and preview the header information that will appear on Market Reports as well how you would like to be notified when reports are sent out. Available options include whenever a market report is sent, on errors only, or never.
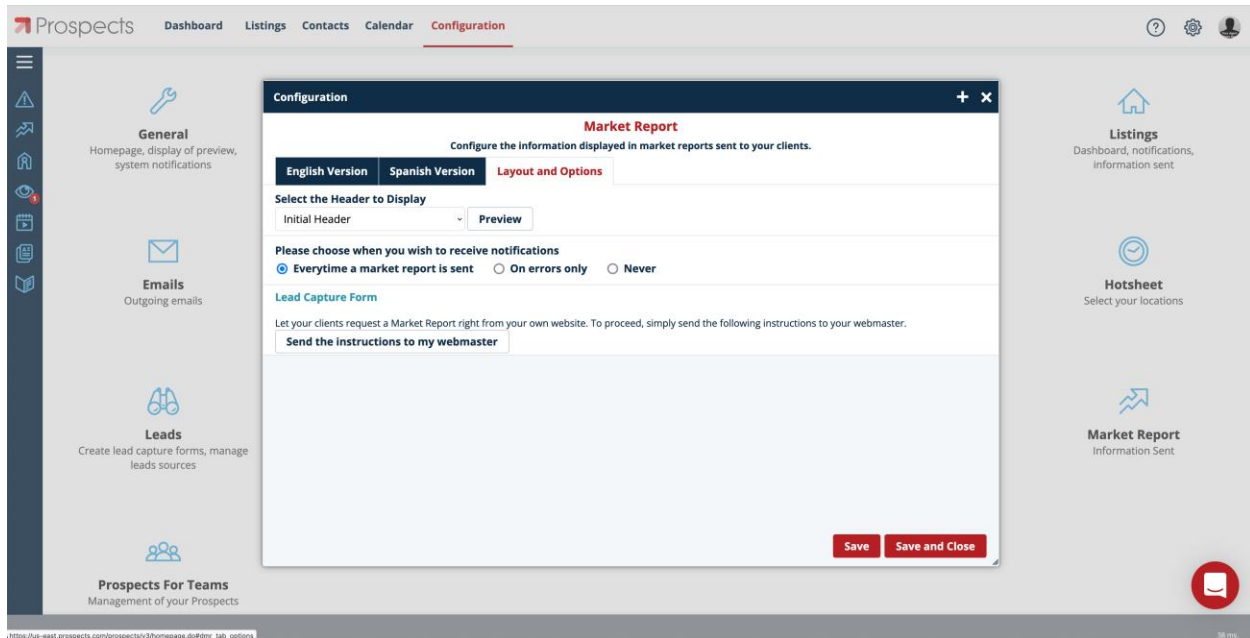
NOTIFICATIONS

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):
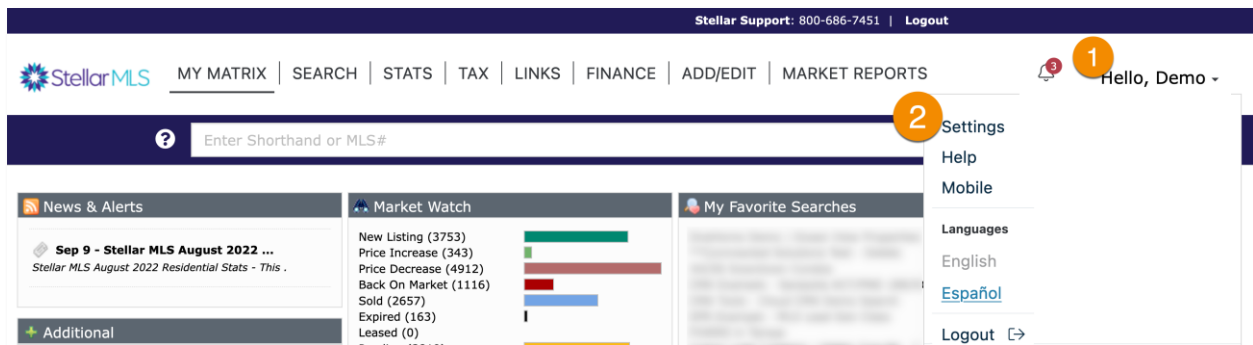
Review the options and choose to be notified by email, text message, or through a daily summary email when your contacts take action in, or visit, the OneHome customer portal. If you select the text message option, enter your mobile number and carrier in the fields provided. Note that text messages arrive once every 10 minutes, so that equates to six (6) times per hour.

When a contact does this...	Notify me ASAP via **Email**	Notify me ASAP via **Text**	Notify me via **Daily Summary Email**
Visits Portal	☐	☐	☑
Saves a Favorite	☑	☑	☑
Removes a Favorite	☐	☐	☑
Discards a Listing	☐	☐	☑
Un-discards a Listing	☐	☐	☑
Adds Notes	☑	☑	☑
Visits Portal First Time	☑	☐	☑

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.

MLS-Touch

Access notifications sent by MLS-Touch by tapping More in the lower-right corner of the display (1), then Settings (2), then Notifications (3). On the screen that follows, make changes as necessary. Note that favorites and discards that are made by your customer in the MLS-Client app are those that will be sent via push to your MLS-Touch app.
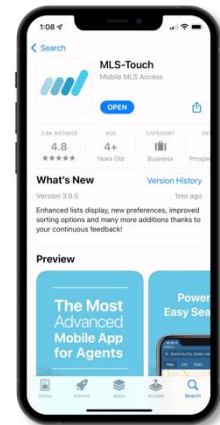
Appendix
MLS-Touch® App Installation

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!
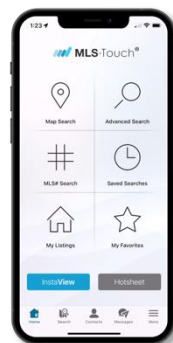
To get started, download the MLS-Touch® app from either the Apple App Store or Google Play Store and open it on your device.

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
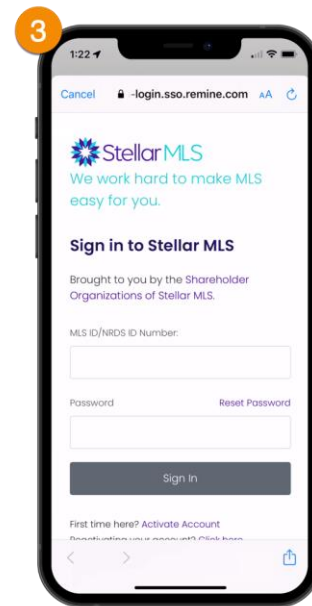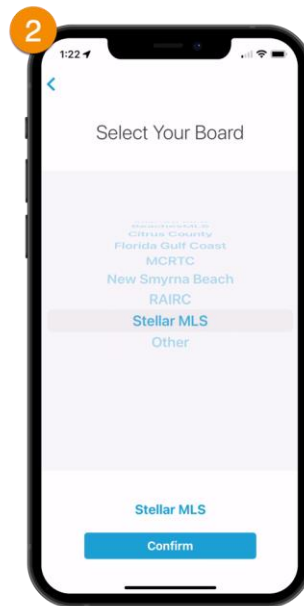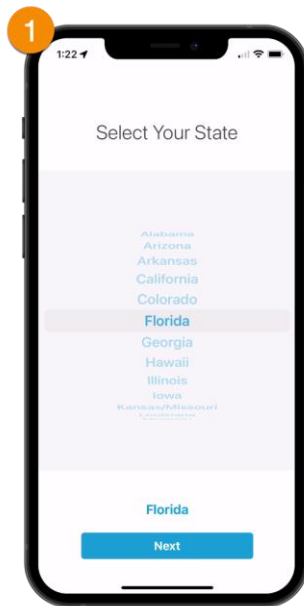
Step 4: Enjoy the app!

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