

# Teams Management

## Guide for Brokers, Office Managers, and Office Assistants

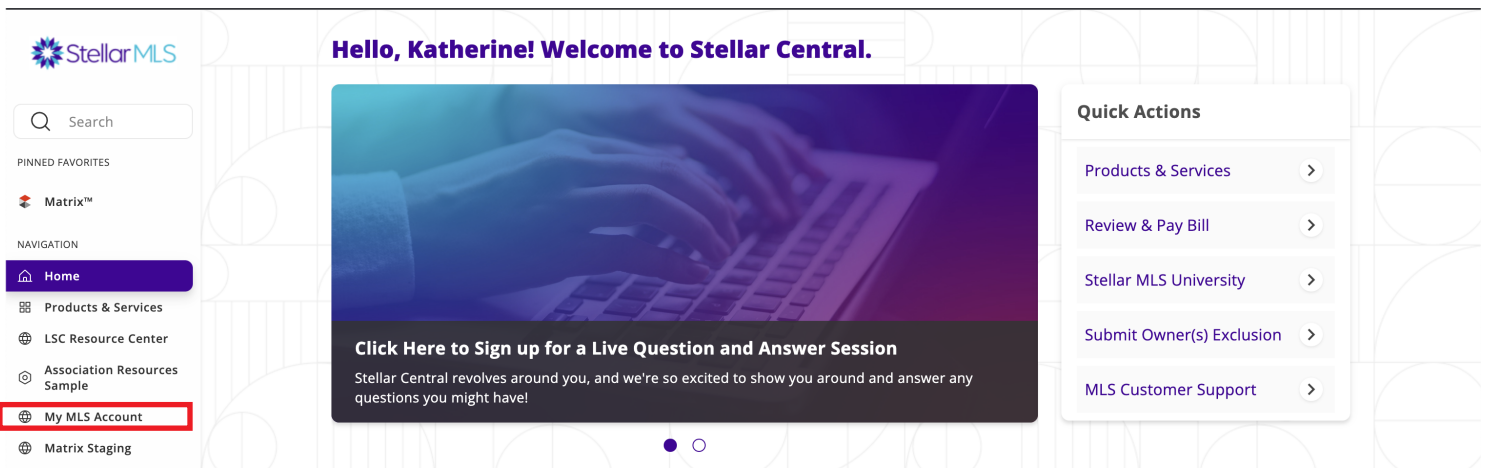
### Overview

Teams can be created by brokers, designated office managers, and office assistants, a team leader can be assigned, and up to 25 agents or assistants from that office can be assigned to the team. The team can be designated for either access only or production credit. If the team is designated for production credit, listings can be entered under a Team name and production reports can be run on the team.

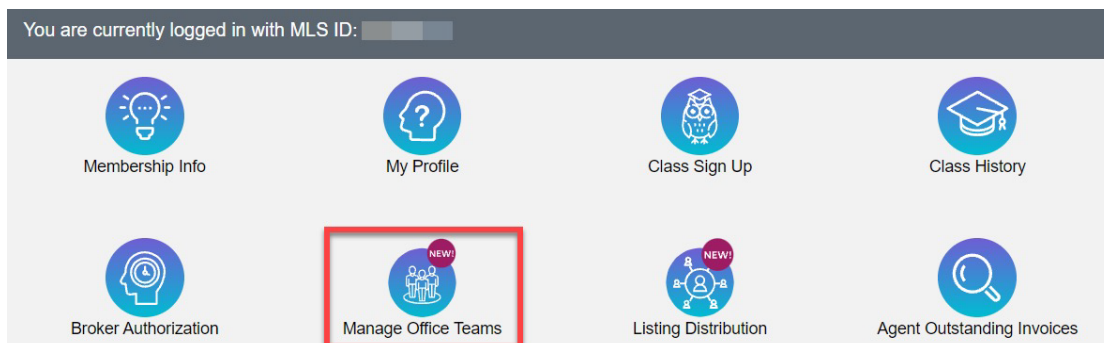
Once a team leader is assigned, that team leader will have the ability to edit team contact information and add or remove members from the team.

### Steps to Manage Team for Office

1) Log into StellarMLS.com and then click on 'My MLS Account' in the navigation panel on the left side of the screen.



2) Select 'Manage Office Teams'.



3) If you have multiple offices “firmed” together, you will see all your office’s here. Click on ‘Manage Office Teams’ for the office you want to manage.

Home Logout Michael Saunders

Note: Changes may take up to 24 hours to reflect in Matrix.

Show/Hide Columns Advance Filter Search:

| Office Name                   | Office No. | Address               | City           | State | ZipCode | Action                              |
|-------------------------------|------------|-----------------------|----------------|-------|---------|-------------------------------------|
| Michael Saunders & Co         | 284508955  | 2077 Plave Lane       | Venice         | FL    | 34292   | <a href="#">Manage Office Teams</a> |
| Michael Saunders & Co. - Boca | 256030041  | 420 East Railroad Ave | Boca Grande    | FL    | 33921   | <a href="#">Manage Office Teams</a> |
| Michael Saunders & Company    | 260033439  | 465 Central Avenue    | St. Petersburg | FL    | 33701   | <a href="#">Manage Office Teams</a> |
| Michael Saunders & Company    | 281532581  | 8184 Gabanna Dr       | Sarasota       | FL    | 34231   | <a href="#">Manage Office Teams</a> |

4) You will now be able to “edit” an existing team or click “+New Team” to create a new team for that office.

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Welcome to your office Teams

OFFICE TEAMS

+ New Team

Show/Hide Columns Advance Filter Search:

| Team Name        | Office Name                | Office Mts | Address Line 1  | City              | Team Lead Name        | Email Address      | Team Status | Team Type         | Action               |
|------------------|----------------------------|------------|-----------------|-------------------|-----------------------|--------------------|-------------|-------------------|----------------------|
| Fortune Sounders | Michael Saunders & Company | 266510204  | 123 Main Street | Orlando           | Pamela J Ali          | testteam@gmail.com | Active      | Production Credit | <a href="#">Edit</a> |
| Millionaire Team | Michael Saunders & Company | 266510204  | 123 Stellar Dr. | Altamonte Springs | Deborah Angelo O'Mara | testteam@gmail.com | Active      | Production Credit | <a href="#">Edit</a> |

5) Manage team details and contact information.

### Managing Team - The Smith Team

TEAM INFORMATION

Office Name: BBA Grizzard Real Estate  
Office Account No.: 260033439

Team Name: The Smith Team  
Team Leader: 260033439  
Impersonation: Impersonate

Member: Can Work As Self

Team Lead Name: Brian Smith  
Team Status: Active  
Team Type: Production Credit

TEAM CONTACT INFORMATION

Address Line 1: 123 Main Street  
City: Tampa  
Postal Code: 33602  
Cellular Phone: (813) 555-1234

Address Line 2:  
State: Florida  
Main Phone No.: (813) 555-1234  
Email Address: smithteam@yourbrokerage.com

Update Changes Formate Team

TEAM MEMBERS

Add New Members

Show: Member Type Office Phone Mobile Phone Search:

| Name                       | Mts No. | Impersonation Mode | Member Type | Office Phone | Mobile Phone |
|----------------------------|---------|--------------------|-------------|--------------|--------------|
| No data available in table |         |                    |             |              |              |

## Team Names

Team name cannot contain any words prohibited by FREC, including agency, associates, brokerage, brokers, company, corporation, corp, inc, llc, lp, llp, partnership, properties, property, real estate, and realty.

If a Team Name changes, Matrix will receive a notification. The team record would be updated, and then the name will be updated in any on-market listings (active, pending, temporarily off-market). Historic listings would not be updated.

TEAM INFORMATION

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Office Name: Michael Saunders & Company  
 Office Account No.: 266510204

Team Name: Millionaire Team

Team Leader: 266504236      Team Lead Name: Deborah Angelo O'Mara

Impersonation: Impersonate      Team Status: Active

Member Can Work As Self      Team Type: Production Credit

## Team Leaders

When you click the "Team Leader" field, a list of eligible leaders pops up. Select the leader. Assistants cannot be team leaders, and an agent can only be the leader of one team. Team Leaders can add members, remove members, change team name, or change team contact information.

TEAM INFORMATION

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Office Name: ERA Grizza  
 Office Account No.: 260503567

Team Name: Test Team

Team Leader: 260503606

Impersonation: Impersonate

Member Can Work As Self

Select a Team Leader


First Name:

Last Name:

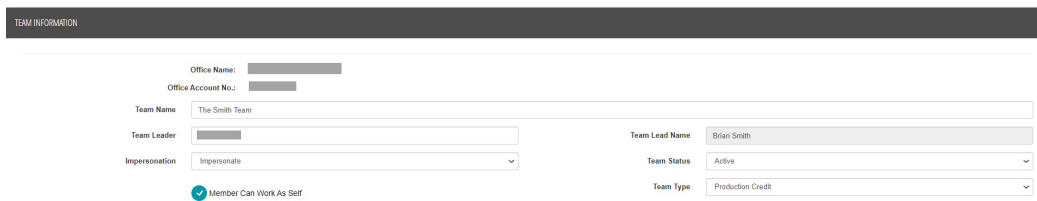
MLS ID:

| MLS Id | Name | Office Id | Office Name | Action |
|--------|------|-----------|-------------|--------|
| █      | █    | █         | █           | Select |
| █      | █    | █         | █           | Select |

## Team Status

If a team is no longer active, the status can be set to “inactive.” Team leaders or members will no longer have access to the team. It can be reactivated at any time in the future. If a team is permanently disbanded, there is a button to remove the team. Teams can only be removed once all members are removed. 

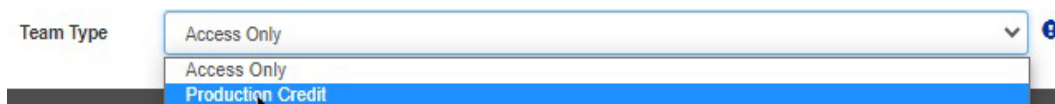
If a team leader’s MLS account is inactivated, the team will automatically be set to “inactive.” Once a new team leader is selected, the team can then be set to “active.”



The screenshot shows a form titled "TEAM INFORMATION" with the following fields: Office Name, Office Account No., Team Name (The Smith Team), Team Leader, Impersonation (set to Impersonate), Team Lead Name (Brian Smith), Team Status (set to Active), and Team Type (set to Production Credit). There is also a checked checkbox for "Member Can Work As Self".

## Team Type

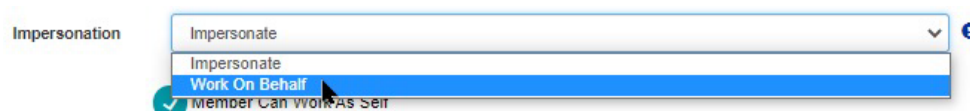
Under this field, teams can be set up for Access Only (such as an agent and their assistant setting up a team to simply grant the assistant account access) or for formal teams who would like to receive Production Credit. Unless Production Credit is selected under the team type, the team cannot be added to a listing.



The screenshot shows the "Team Type" dropdown menu with three options: Access Only, Access Only, and Production Credit. The "Production Credit" option is highlighted in blue.

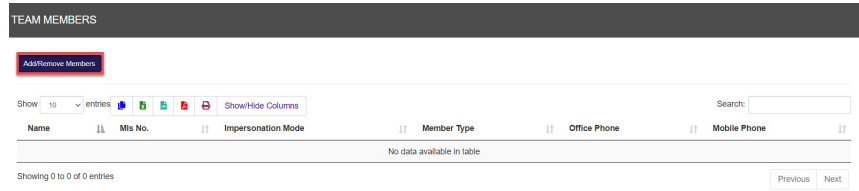
## Impersonation

Under this field, the default impersonation level can be set for the team. This can be changed for individual members as they are added to the team. **Impersonate means that the member will be logged in as the team.** There is a checkbox for Member Can Work As Self that gives team members the ability to switch to their personal account. **On Behalf Of means that the team members will be logged in as themselves but will be able to complete items “on behalf of” the team.**

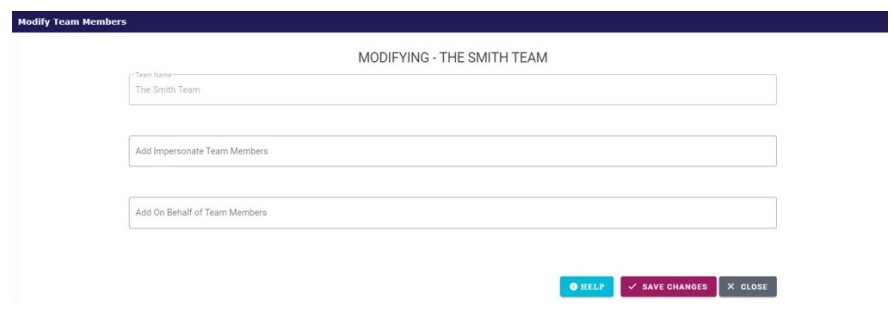


The screenshot shows the "Impersonation" dropdown menu with three options: Impersonate, Impersonate, and Work On Behalf. The "Work On Behalf" option is highlighted in blue. Below the dropdown is a checked checkbox for "Member Can Work As Self".

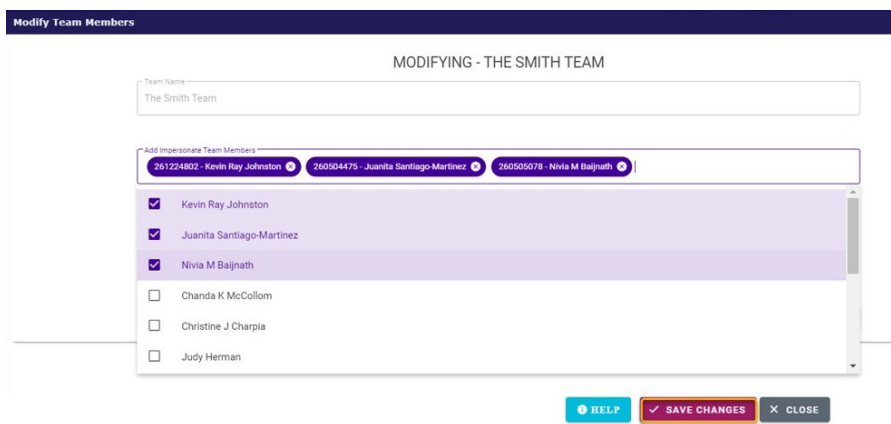
6) Add or remove team members - Teams can have a max of 25 members with agent or assistant access levels; they must be from the same office. While a licensed agent can only be the leader of one team, agents or assistants can belong to more than one team in a specific office.



**Note:** Click to add members to impersonate or work on behalf of the team. When you click one of these fields, a list of eligible team members will appear.



When adding a member, start typing a name or ID for predictive text. To remove a member, click the "X" by their name.



## Adding Teams to Listings

If the Team Type is for "Production Credit," a team can be added to a listing for either listing or selling credit. The list or selling agent must also be a member of the team.

| Agent/Office  |  |  | Selling Agent ID  |
|---|--|--|---|
| <b>List Agent ID</b><br><input type="text" value="Chris Lumia(261547101)"/> | <b>Agent Name and Information</b><br>Chris Lumia<br>813-444-6102<br>Call: 813-763-6400<br>chris.lumia@stellarmls.com | <b>Office Name and Information</b><br>251002205<br>STELLAR MLS<br>407-960-5300<br>For Future Use     | <input type="text" value="Agent Name or ID"/><br>Refresh                              |
| <b>List Agent 2 ID</b><br><input type="text" value="Agent Name or ID"/>     | <b>Agent Name and Information</b>  | <b>Office Name and Information</b>   | <b>Selling Agent ID 2</b><br><input type="text" value="Agent Name or ID"/><br>Refresh |
| <b>List Team ID</b><br><input type="text" value="Team Name or ID"/>         | <b>List Team Name</b><br><input type="text" value=""/>   | <b>Interoffice Info</b><br><input type="text" value=""/><br><small>Characters Remaining: 255</small> | <b>Selling Team ID</b><br><input type="text" value="Team Name or ID"/><br>Refresh     |

Starting in late February 2022, production and ranking reports can be run by Agent Only, Agent and Team, Team Only, Office, or Firm. Team listings will only appear on Market Reports for transactions that closed on or after 1/1/2022. Retroactive credit will not be given for listings that closed in 2021 or prior.