



Teams Management

Full Resource Guide



Table of Contents

Guide for Brokers, Office Managers, and Office Assistants.....	3-8
Guide for Team Leaders.....	9-12

Teams Management

Guide for Brokers, Office Managers, and Office Assistants

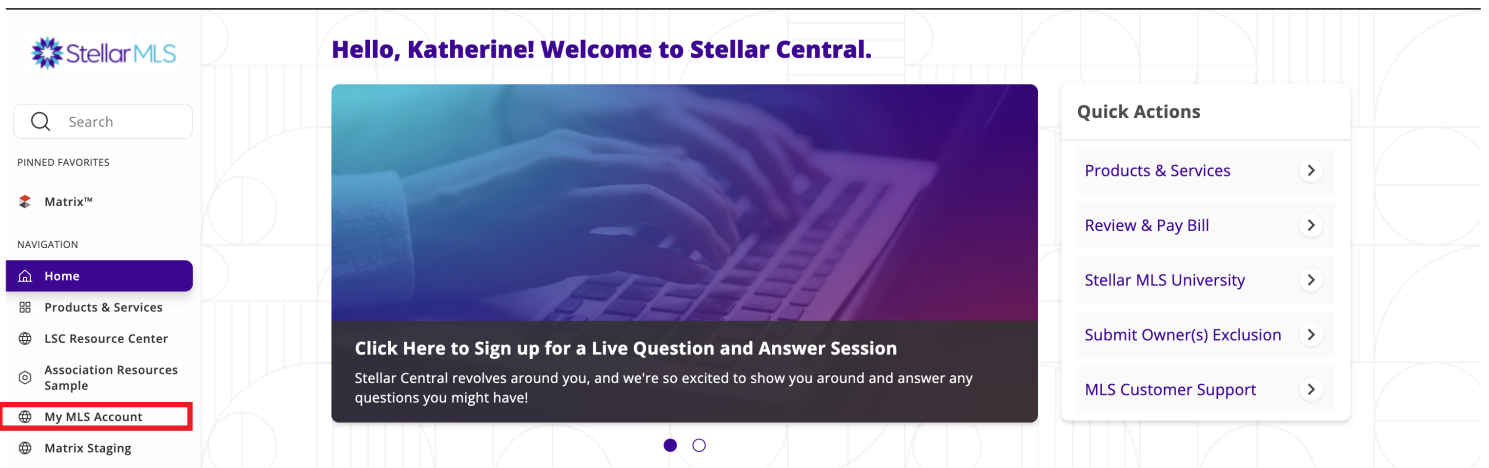
Overview

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.

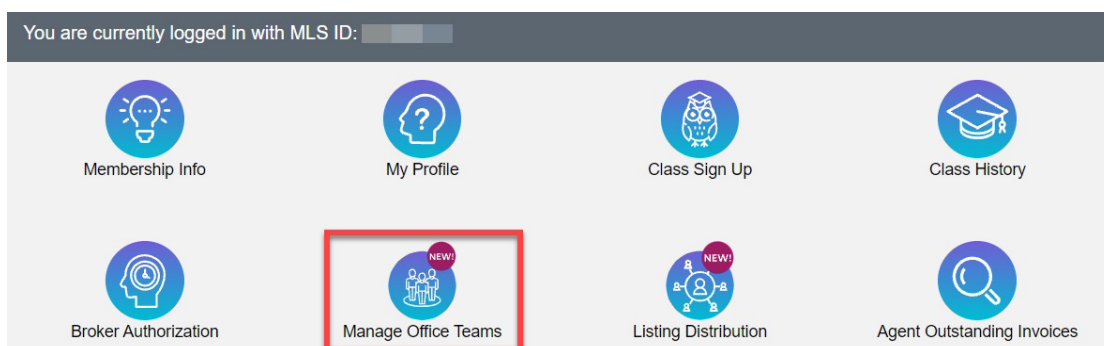
Once a team leader is assigned, that team leader will have the ability to edit team contact information and add or remove members from the team.

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	Manage Office Teams
Michael Saunders & Co. - Boca	256030041	420 East Railroad Ave	Boca Grande	FL	33921	Manage Office Teams
Michael Saunders & Company	260033439	465 Central Avenue	St. Petersburg	FL	33701	Manage Office Teams
Michael Saunders & Company	281532581	8184 Gabanna Dr	Sarasota	FL	34231	Manage Office Teams

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

Home Logout Michael Saunders

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	Edit
Millionaire Team	Michael Saunders & Company	266510204	123 Stellar Dr.	Altamonte Springs	Deborah Angelo O'Mara	testteam@gmail.com	Active	Production Credit	Edit

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: 33502
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 Show/Hide Columns 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

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

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:

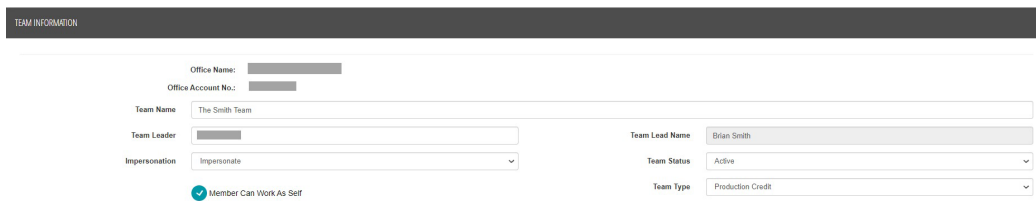
MLS ID:

MLS Id	Name	Office Id	Office Name	Action
█	█	█	█	<input type="button" value="Select"/>
█	█	█	█	<input type="button" value="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.”



TEAM INFORMATION

Office Name: [Redacted]

Office Account No.: [Redacted]

Team Name: The Smith Team

Team Leader: [Redacted]

Impersonation: Impersonate

Member Can Work As Self

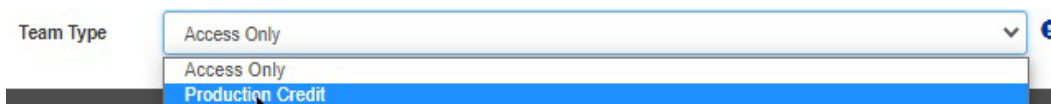
Team Lead Name: Brian Smith

Team Status: Active

Team Type: Production Credit

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.

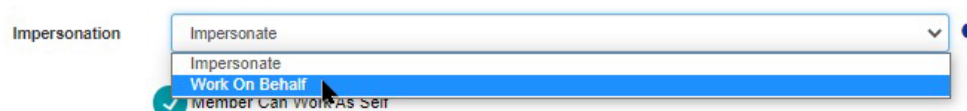


Team Type

- Access Only
- Access Only
- Production Credit

Impersonation

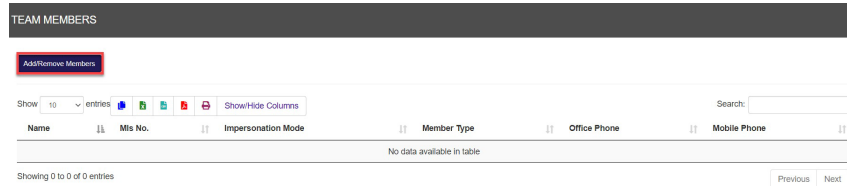
Under this field, the default impersonation level can be set for the team. This can be changed for individual members as they are added to the team. **Impersonate means that the member will be logged in as the team.** There is a checkbox for Member Can Work As Self that gives team members the ability 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.**



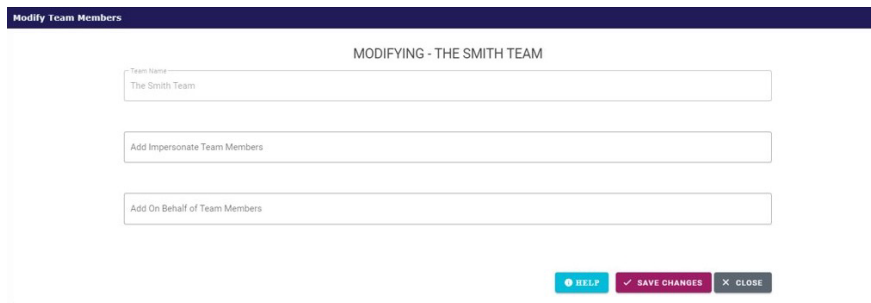
Impersonation

- Impersonate
- Impersonate
- Work On Behalf
- Member Can Work As Self

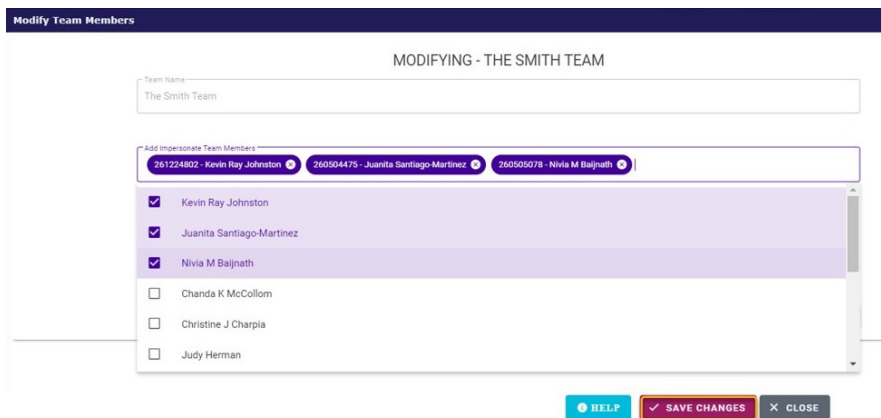
6) Add or remove team members - Teams can have a max of 25 members with agent or assistant access levels; they must be from the same office. While a licensed agent can only be the leader of one team, agents or assistants can belong to more than one team in a specific office.



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

Teams Management

Guide for Team Leaders

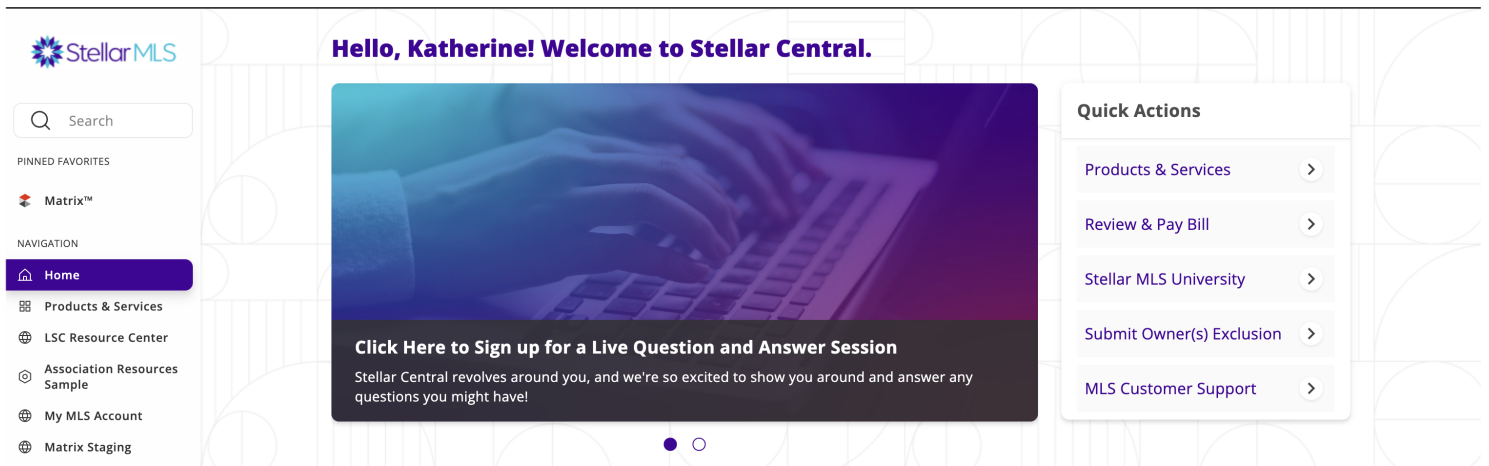
Overview

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.

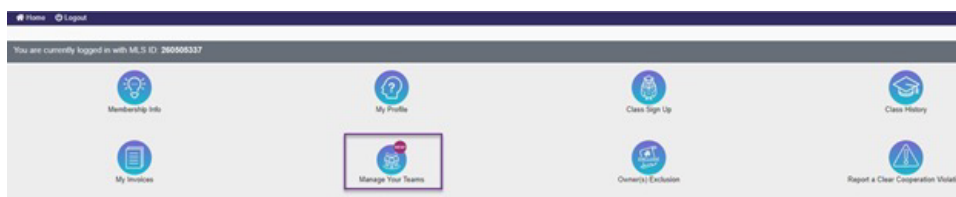
Once a team leader is assigned, that team leader will have the ability to edit team contact information and add or remove members from the team. If the team is set up for production credit, team members with Add/Edit access can enter listings in the team's name, and if the team brings a buyer to a listing, the listing agent can attribute selling credit to the team.

Steps for a Leader to Manage Their Team

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

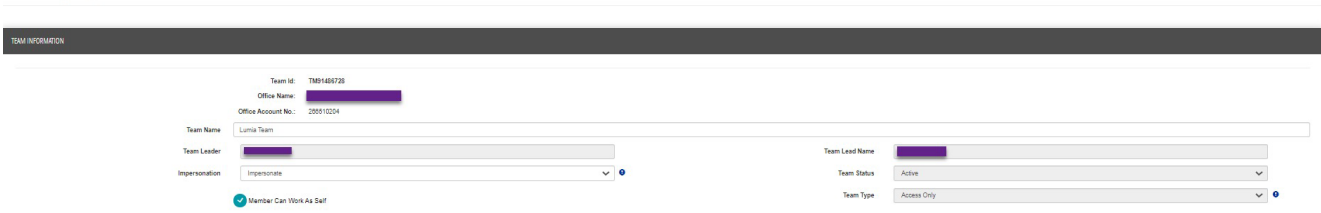


2) Select 'Manage Your Teams'.



3) Manage team details and contact information.

Managing Team - Lumia Team



Team ID: TMS1485238
 Office Name: [Redacted]
 Office Account No.: 200910204
 Team Name: Lumia Team
 Team Leader: [Redacted]
 Impersonation: Impersonate
 Team Lead Name: [Redacted]
 Team Status: Active
 Team Type: Access Only
 Member Can Work As Self

Note: The Team Leader field, Team Status field, and Team Type field can only be modified by the broker or their designees with office-level access.

Team Names

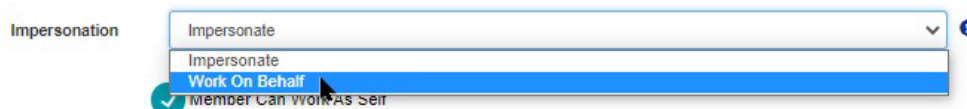
Team name cannot contain any of the words prohibited by FREC, including: agency, associates, brokerage, brokers, company, corporation, corp, inc, llc, lp, llp, partnership, properties, property, real estate, and realty.

If a Team Name changes, Matrix will receive 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.

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.**



Impersonation: [Impersonate] (dropdown menu)
 [Work On Behalf] (highlighted)
 Member Can Work As Self

Team Contact Information

The team contact information, which shows up in the Teams Directory Search in Matrix, can be modified.

TEAM CONTACT INFORMATION

<p>Address Line 1 <input type="text" value="123 Stellar Dr."/></p> <p>City <input type="text" value="Allamonte Springs"/></p> <p>Postal Code <input type="text" value="32701"/></p> <p>Cellular Phone <input type="text" value="(123) 456-7890"/></p>	<p>Address Line 2 <input type="text"/></p> <p>State <input type="text" value="Florida"/></p> <p>Main Phone No. <input type="text" value="(407) 123-4567"/></p> <p>Email Address <input type="text" value="testteam@gmail.com"/></p>
---	---

Update Changes

4) Add or remove team members. Teams can have max of 25 members with agent or assistant access levels; must be from 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.

TEAM MEMBERS

Add/Remove Members

Show: 10 entries Search:

Name	Mls No.	Impersonation Mode	Member Type	Office Phone	Mobile Phone
No data available in table					

Showing 0 to 0 of 0 entries Previous Next

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.

Modify Team Members

MODIFYING - THE SMITH TEAM

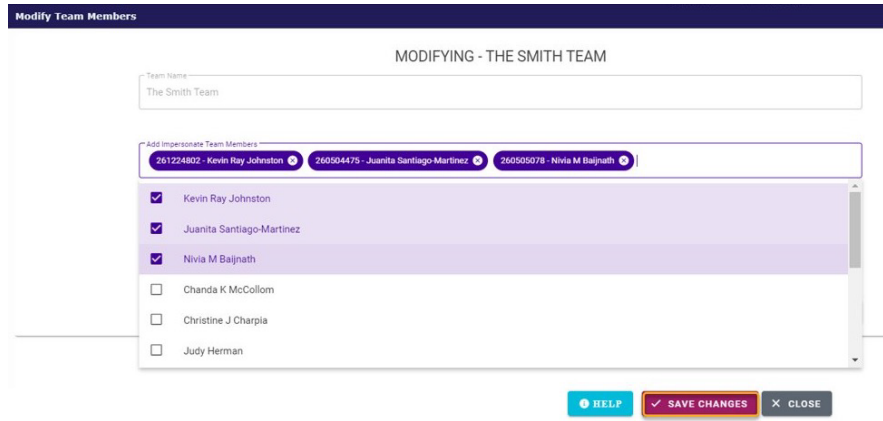
Team Name

Add Impersonate Team Members

Add On Behalf of Team Members

HELP
SAVE CHANGES
CLOSE

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 agent credit. The list or selling agent must also be a member of the team.



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.