

# Quick Add to Contacts

MRMLS matrix integrated another method of adding contacts into Matrix. This added benefit makes it easier for you to add your customer's information quickly. You are able to add their contacts while setting up an Email or Auto Email from any property results page.

## 1.1 From Email

1. Run a property search and click on the **Email** button.

The screenshot shows the MRMLS Matrix interface. At the top, there is a navigation bar with links like Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, PinPoint, Smart Trac, Statistics, Admin, Help, and Logout. Below this is a breadcrumb trail: Residential · Detail · Quick · MLS# · Address. The main content area is titled "Original Results" and shows a table of search results. The table has columns for ML#, S Type, St#, St Name, City, Area, TG#, L/S Price, Br/Ba, YrBlt, Sqft, LSqft, DOM/CDOM, V, and P. Four results are listed, each with a checked checkbox in the first column. Below the table, there are several buttons: Narrow, Discard, Save, Sort, Print Report, CMA, Print Page, Stats, Export, Email, and Map. The "Email" button is highlighted with a red box. A callout box points to it with the text "Click on Email".

2. Click the  To: icon to select your customer's contact. If you cannot locate their contact information, click the **Create a New Contact** link.

The screenshot shows the "Email Listings" form. It has a "From:" field with the value "REALTOR AGENT" <REALTOR@REALTY.COM>. There is a "To:" field with a "To:" icon to its left. Below the "To:" field is a "CC:" field. A "Create a New Contact" link is highlighted with a red box. Below the "CC:" field is a checkbox labeled "Bcc me a copy of this message." which is also highlighted with a red box. A callout box points to this checkbox with the text "Click on Create a New Contact". Below the form, there is a "Display:" field with a dropdown menu set to "Public - 1 Line" and a "Preview" button. At the bottom, there is a "Characters Remaining: 4089" label and a "Check Spelling English" link. "Send" and "Cancel" buttons are at the bottom right.

The screenshot shows the "Select Contacts" dialog box. It has a "Type Name or Select from list:" field. Below this field is a list of contacts, with "Smith, Buyer (buyer@smith.com)" highlighted in blue. A "Create a New Contact" link is highlighted with a red box. Below the list is a "Recipients:" field with a "To ->" button and the text "Smith, Buyer;". Below the dialog box, there is a text box with the text "Select your customer's contact information or click **Create a New Contact**".

- A pop up window will appear. In this window you will be able to add your customer's **Title**, **First Name**, **Last Name**, **Email Address**, **Phone** and **Cell**. Click **Add** to save your customer's information or **Cancel** to return to the previous window.

Note: the **Show all Fields** link will let you add your customer's home and business information and any additional notes.

## 1.2 From Auto Mail

- Run a property search and click on the **Save** button to create an Auto Mail.

MRMLS MATRIX

Home Search My Matrix Add/Edit Finance Roster Realist Tax PinPoint Smart Trac Statistics Admin Help Logout

Residential Detail Quick MLS# Address Welcome (1)

Original Results

Results 1-4 of 4. Checked 4. Un-check all 4.

Previous Next [1] Bottom View Cart (6) Add to Empty

| ML#       | S Type  | St#   | St Name      | City | Area | TG#   | L/S Price | Br/Ba  | YrBlt | Sqft  | LSqft | DOM/CDOM | V | P |
|-----------|---------|-------|--------------|------|------|-------|-----------|--------|-------|-------|-------|----------|---|---|
| W08133025 | A SFR/D | 904 N | Stoneman Av  | ALH  | 601  | 596A3 | \$633,000 | 5/4.00 | 1911  | 2,000 | 7,685 | 34/34    | N | N |
| W08107407 | A SFR/D | 219 N | El Molino St | ALH  | 601  | 596C4 | \$648,888 | 3/2.00 | 1911  | 1,292 | 7,500 | 87/87    | N | N |
| P2116557  | A SFR/D | 16    | Halsted Cr   | ALH  | 601  | 596C3 | \$680,000 | 3/2.00 | 1926  |       | 8,341 | 20/20    | N | N |
| W08112269 | A SFR/D | 111 N | Hidalgo Av   | ALH  | 601  | 596C4 | \$750,000 | 8/3.00 | 1913  | 3,057 | 6,958 | 77/77    | N | N |


Previous Next [1] Top View Cart (67) Add to Empty

Narrow Discard Save Print Report CMA Print Page Stats Export Email Map

Display Agent 1 Line at 10 per page. Search selected for

Click on **Save**

2. Select the drop down menu for Primary contact. If you do not see your client's contact information, click on **Create a New Contact**.



**Save Search**  
Use this page to save your current search. Saving a search allows you to instantly return to it at any time, without having to enter the search criteria again. You can access your saved searches at any time in the My Matrix tab above. Note: You can make your search automatically email any new matching listings that appear on the system to a Contact. To enable this search as an automatic search, click the Enable Auto Email button below.

Search Name:

Description (optional):

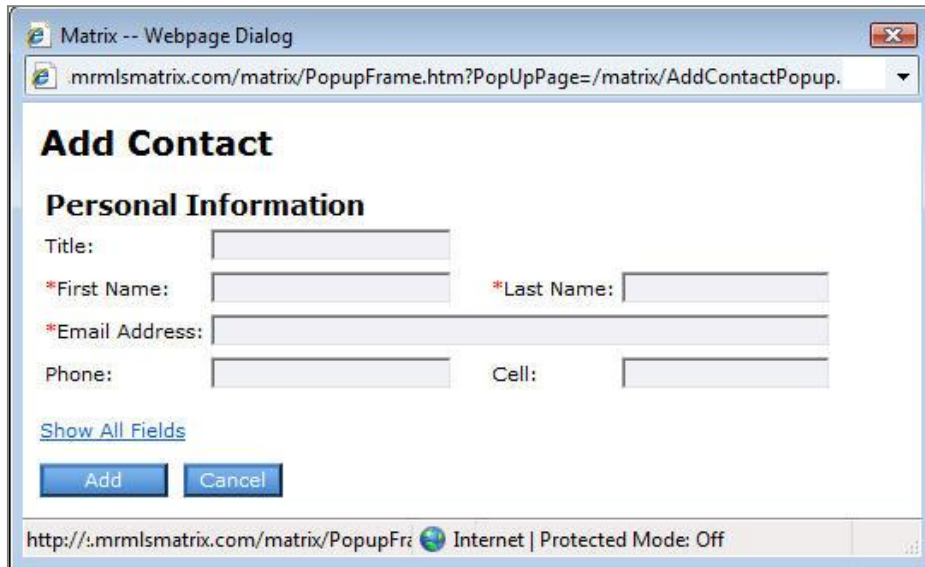
Primary Email Contact:

Enable as Hot Search on Home tab (12 maximum)

Click on **Create a New Contact**

3. A pop up window will appear. In this window you will be able to add your customer's **Title, First Name, Last Name, Email Address, Phone** and **Cell**. Click **Add** to save your customer's information or **Cancel** to return to the previous window.

Note: the **Show all Fields** link will let you add your customer's home and business information and any additional notes.



Matrix -- Webpage Dialog

mrmlsmatrix.com/matrix/PopupFrame.htm?PopUpPage=/matrix/AddContactPopup.

**Add Contact**

**Personal Information**

Title:

\*First Name:  \*Last Name:

\*Email Address:

Phone:  Cell:

[Show All Fields](#)

http://:mrmlsmatrix.com/matrix/PopupFr Internet | Protected Mode: Off