METROLIST®

Enhanced Admin Functionality

Metrolist has enabled new functionality using the "Team Settings" option that will allow an admin to work on behalf of individual agents in an office. Agents will have the ability to choose which admin or agent in your office can work on your behalf or impersonate you. When enabled, it also means that the admin can send emails or reports under your name, rather than under the admin's name.

If you want a formal Team Account using a separate Team ID, you'll still need to request this setup through Metrolist.

To Add an Admin to Your Team:

1. Go to **My Matrix→Settings→Team Settings**.
2. Enter the Agent ID of the person you want to allow to work on your behalf, and then click **Find**.

3. Select how you want this person to access your account, then click **Add**:
   a. **Have this member impersonate me:** all emails and reports sent by the admin will appear as though they were sent directly from you.
   b. **Have this member work on behalf of me:** the admin or other agent's name will appear in emails and reports they send for you (for example, "Joe Smith on behalf of Jane Adams").


Optional Team Name

- You have the option to set a team name when you've added someone else to your account. The team name you enter here is what will appear in auto emails, direct emails, and other reports emailed from Matrix. If you don't setup a team name, your name will continue to be used in emails and reports sent from Matrix.

The value of information. The power of insight.℠

- **"I impersonate this team"** means that all emails and reports will be sent as that team name (for example, "Joe's Team").
  Note: Select "Allow Team Members the option of switching…" to give your team members an option on email and print screens to use either the team name or their name when working as the team.
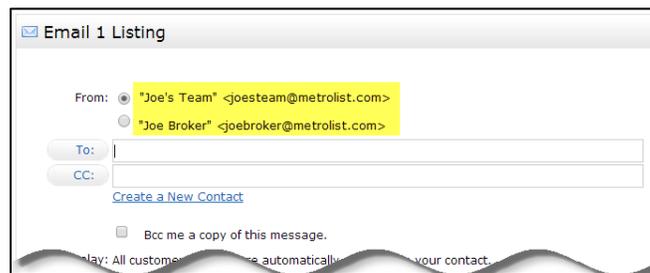
- **"I work on behalf of this team"** means that all emails and reports will be sent with both the team name and each team member's name (for example, "Jane Broker on behalf of Joe's Team").

Working as an Admin:

- After an agent has added you to be part of their team, you'll see your name switch to **"Working as…"** next to the Matrix Help tab.
- Click this link to select the agent's name and switch to working on behalf of the agents who have added you to their team.
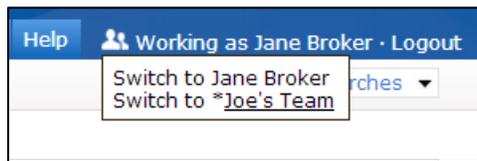
Considerations:

- The other agent or admin must be in the same Office ID for you to add them to your team.
- If you are trying to give an admin access to work on your behalf, you must add their ID to your team. The admin cannot add you to a team.
- The people you have added to your team will have access to all of your Matrix functionality and information, such as your contacts, your saved searches and auto emails, and the ability to add or edit your listings.
- You'll see a warning on the Matrix dashboard when you have an admin setup through the Team Settings functionality.
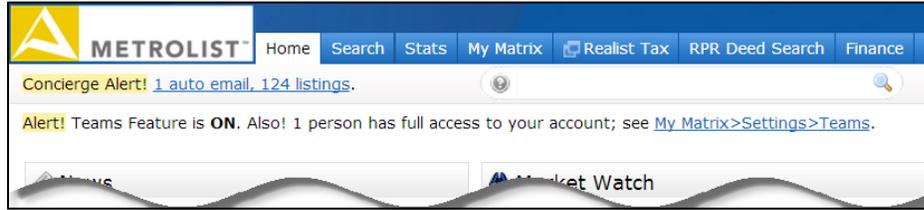
- If you want to create a team that still has a separate team ID, you'll still need to request the team setup through Metrolist using the Team Account Form.
- To remove an admin from your team, go to **My Matrix→Settings→Team Settings**, select the person you want to remove, then click **Delete**.
  Note: If you click **Disable this team feature**, the team list is not cleared but your team members no longer have access to work for you or on your behalf. To re-enable their access, you must add the team member again and select if you would like them to impersonate or work on your behalf.
- To change if someone is impersonating you or working on your behalf, click **Add** and search for their Agent ID, then click the **Edit** option.

6455 South Yosemite Street, Suite 500, Greenwood Village, CO 80111 • **P** 303.850.9576 • **F** 303.850.9637 • www.REcolorado.com

Revised June 3, 2014