

These are instructions for those of you who will be using an Assistant, Team Member, or even another Agent (maybe while you go on vacation), to be able to operate as you in the Matrix system.

The person Granting the Permission needs to do the following:

1. Log into Matrix
2. You will need the User ID of the person with whom you wish to share access.
 - a. **NOTE:** You may only share with people who are in the same Firm or Company as you.
 - b. If they aren't standing right there, you can Search for the name(s) in the MLS.
 - c. Either search in the traditional manner, or simply typing "Agent" followed by their name in the Speed Bar.
 - d. Write down their MLS # and proceed to the next step.
3. Click "My Matrix" in the Menu Bar
4. Click "Settings"
5. Click "Team Settings"
6. Click "Add"
7. Enter the User ID and press "Find"
8. Verify that the correct name appeared
9. Choose to either:
 - a. Have this member Impersonate me

Or

 - b. Have this member Work on Behalf of me which has limited access for when you ask another Agent to watch your business while you go on vacation
10. Click "Add"
 - a. Verify that the Team member is now listed on the screen with the proper access level.
11. You may add a custom Team Name if you are really cool.
12. You may also add additional Team Members at this time.

Full Instructions for implementing and using Teams are available on this PDF:

http://pcmls.org/Matrix/Custom/Help/Team_Function.pdf