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How do I set up a Team?

I work with other agents as part of a team

One person must be designated as the team leader. This person sets up the team in his/her account and then assigns other agents as team members (as well as any administrative support assistants).

Instructions for the team leader:

- Log in to NorthstarMLS Add/Edit (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click on "Teams" on the menu in the upper right corner of the screen.
- Click "Create New Team" on the left side menu.
    - ***Note:*** *You may have only one team enabled at a time. If you already have a team enabled, the "Create New Team" option will not be available until you disable your currently active team.*
- Select whether you want team members to work together in Add/Edit only, Matrix only or both.
- Type in a name for your team. If there is no team name and members do business for you, you may simply type in your own name as the team name.
- If you want, type in a description for the team.
- For Matrix, indicate whether you yourself will impersonate the team or work on behalf of the team.
    - ***I, the Team Owner, Impersonate This Team***
        - Emails you send from Matrix will be sent from your name and email address, and will use your email banner and footer (if you have chosen one) and email signature. If you click the checkbox to allow team members the option of switching between own name and team name, then you will also have that option.
        - Print reports – any reports that are printed will have your information in the "Courtesy of" section.
    - ***I, the Team Owner, Work on Behalf of This Team***
        - Emails sent from Matrix would be sent from "<your name> on behalf of <team name>" and your email address, and would use your email banner and footer (if you have chosen one) and email signature.
        - Print reports – any reports that are printed will have your information in the "Courtesy of" section.
        - With this setting, you do not have the option of allowing team members the option of switching between own name and team name.
- Click the check box if you want team members to be able to choose between their own name and the team name when printing reports and emailing contacts. If you want them to exclusively use the team name, then leave the box unchecked.

- o ***Note:*** *If you selected that you are setting up this team for Add/Edit only, then this checkbox option will not appear.*
- Select whether you as the team leader want to be able to add/edit team listings according to your broker-assigned permission levels. If your broker has assigned you "Agent-Edit" or higher permissions, selecting "Yes" would allow you to add and fully edit listings for the team. If your broker has assigned you "Agent Subscriber" permissions, selecting "Yes" would allow you only to add/edit media and open houses for existing team listings.
- Click the "Save" button.

I provide administrative support to an agent or I am an agent who has an assistant

We recommend that the agent who is to be supported set up the team in his/her account and then assigns the assistant(s) as team member(s), especially if the team is to also be used in Matrix.

Instructions for the agent to be supported:
- Log in to NorthstarMLS Add/Edit (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click on "Teams" on the menu in the upper right corner of the screen.
- Click "Create New Team" on the left side menu.
  - o ***Note:*** *You may have only one team enabled at a time. If you already have a team enabled, the "Create New Team" option will not be available until you disable your currently active team.*
- Select whether you want your assistant(s) to do work for you in Add/Edit only, Matrix only or both.
- Type in a name for your team. Because you are setting up assistants to support you, not an actual team, you will likely want to just type in your own name here.
- If you want, type in a description for the team.
- For Matrix, indicate whether you yourself will impersonate the team or work on behalf of the team. Since you are merely setting up assistants to support you, you will most likely want to select "Impersonate." This simply results in emails and reports you create having just your name on them and not the added text of "on behalf of" before your name.
- Click the check box if you want your assistant(s) to be able to choose between their own name and your name when printing reports and emailing contacts. If you want them to exclusively use your name (or you are setting up the assistants to support you in Add/Edit only), then leave the box unchecked.
- Select whether you want to be able to add/edit your own listings according to your broker-assigned permission levels. If your broker has assigned you "Agent-Edit" or higher permissions, selecting "Yes" would allow you to add and fully edit your own listings. If your broker has assigned you "Agent Subscriber" permissions, selecting "Yes" would allow you only to add/edit media and open houses for your existing listings.
- Click the "Save" button.

How do I disable or re-enable an existing Team?

- Log in to NorthstarMLS Add/Edit (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click on "Teams" on the menu in the upper right corner of the screen.
- To disable your current team: In your teams list, click on the "Yes" link in the "Enabled?" column for your currently active team. Select "No" from the "Enabled" drop-down box. Click the "Save" button and then the "OK" button to confirm.
- To re-enable a previously created team: You may only have one team enabled at a time. So if you already have a currently active team, you must first disable it before you can reactivate (or create) another one. Once any currently active team is disabled, click the "No" link in the "Enabled?" column for the team you want to reactivate. Select "Yes" from the "Enabled" drop-down box. Click the "Save" button and then the "OK" button to confirm.

How do I delete an existing Team?

You can disable a team (see instructions above) but you cannot delete a team. Once a team is created, it may get listings assigned to it. Even if the team is later disbanded, we need to keep the team in our database so that it will still show on any of the former team's listings in NorthstarMLS Matrix.

How do I add team members and manage their permissions?

I work with other agents as part of a team
One person must be designated as the team leader. This person sets up the team in his/her account and then assigns other agents as team members (as well as any administrative support assistants). **You may only add other Active NorthstarMLS members as team members.** They may be in the same office, same brokerage or a different brokerage (however, you cannot grant Add/Edit privileges to a team member who is with a different brokerage).

Instructions for the team leader:
- Log in to NorthstarMLS Add/Edit (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click on "Teams" on the menu in the upper right corner of the screen.
- Click the "Manage Members" link in the far right column of your active team.
- If you know the person's MLS ID number, type it in the box provided and click the "Add Team Member" button. If you do not know their MLS ID number, type in their last name and then select from the drop-down list.
- For Matrix, indicate whether you want this team member to impersonate the team or work on behalf of the team.
  Note: This option will display only if you have set up the overall Team with Matrix access.
    - *Impersonate*
        - Emails sent from Matrix (while signed in to Matrix as the Team) would be sent from the Team name and **_your_** email address, and would use **_your_** email banner and footer (if you have chosen one) and email signature. The name and email address in the "From" line will be highlighted in yellow. This is to call attention

to the team member the fact that he/she is sending that email as you, the team leader. This means that to the client, the email will look exactly as if it came from you, the team leader. If in the team set-up you checked the box allowing team members to switch between their own name and the team name, then the team member will have the option of sending team emails under their own name and email address.

- Print reports – any reports that are printed while impersonating the team will have the information of you, the Team Leader, in the "Courtesy of" information. In other words, the report will look as if it were printed by you.
- The team member will have access to all of your Matrix Contacts and Saved Searches (but cannot change your team settings)

o *Working on Behalf of Another Agent*
- Emails sent from Matrix would be sent from the team member's own name and email address on the Team's behalf, and would use the team member's email banner and footer (if one is chosen) and email signature.
- Print reports - any reports that the team member prints while working on behalf of the team will indicate that they were printed by the team member on behalf of the team.
- The team member will have access to your Matrix Contacts and Saved Searches but cannot change your team settings.

- For Add/Edit, indicate whether you want this team member to be able to add/edit team listings according to his/her broker-assigned permission levels. If your broker has assigned this person "Agent-Edit" or higher permissions, selecting "Yes" would allow him/her to add and fully edit listings for the team. If your broker has assigned this person "Agent Subscriber" permissions, selecting "Yes" would allow him/her only to add/edit media and open houses for existing team listings.
  Note: This option will display only if you have set up the overall Team with Add/Edit access.
- Click the "Update Member" button.
- You can manage team members' permissions at any time by clicking the "Edit" link in the far right column.

I provide administrative support to an agent or I am an agent who has an assistant

The agent who is to be supported must set up the team in his/her account and then assigns the assistant(s) as team member(s). **The Assistant(s) must be Active NorthstarMLS users with a NorthstarMLS ID.**

Instructions for the agent to be supported:
- Log in to NorthstarMLS Add/Edit (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click on "Teams" on the menu in the upper right corner of the screen.
- Click the "Manage Members" link in the far right column of your active team.
- If you know the assistant's MLS ID number, type it in the box provided and click the "Add Team Member" button. If you do not know their MLS ID number, type in their last name and then select from the drop-down list.

- For Matrix, indicate whether you want this assistant to impersonate the team or work on behalf of the team.
  Note: This option will display only if you have set up the overall Team with Matrix access.
  - ○ *Impersonate*
    - Emails sent from Matrix (while signed in to Matrix as the Team) would be sent from the Team name and **your** email address, and would use **your** email banner and footer (if you have chosen one) and email signature. The name and email address in the "From" line will be highlighted in yellow. This is to call attention to the team member the fact that he/she is sending that email as you, the team leader. This means that to the client, the email will look exactly as if it came from you, the team leader. If in the team set-up you checked the box allowing team members to switch between their own name and the team name, then the team member will have the option of sending team emails under their own name and email address.
    - Print reports – any reports that are printed while impersonating the team will have the information of you, the Team Leader, in the "Courtesy of" information. In other words, the report will look as if it were printed by you.
    - The team member will have access to all of your Matrix Contacts and Saved Searches (but cannot change your team settings)
  - ○ *Working on Behalf of Another Agent*
    - Emails sent from Matrix would be sent from the team member's own name and email address on the Team's behalf, and would use the team member's email banner and footer (if one is chosen) and email signature.
    - Print reports - any reports that the team member prints while working on behalf of the team will indicate that they were printed by the team member on behalf of the team.
    - The team member will have access to your Matrix Contacts and Saved Searches but cannot change your team settings.
- For Add/Edit, indicate whether you want this assistant to be able to add/edit team listings according to his/her broker-assigned permission levels. If your broker has assigned this person "Agent-Edit" or higher permissions, selecting "Yes" would allow him/her to add and fully edit listings for you. If your broker has assigned this person "Agent Subscriber" permissions, selecting "Yes" would allow him/her only to add/edit media and open houses for your listings.
  Note: This option will display only if you have set up the overall Team with Add/Edit access.
- Click the "Update Member" button.
- You can manage assistants' permissions at any time by clicking the "Edit" link in the far right column.

How do I remove members from a team?

- Log in to NorthstarMLS Add/Edit (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click on "Teams" on the menu in the upper right corner of the screen.
- In your teams list, click on the "Manage Members" link in the far right column for your currently active team.
- Click the "Delete" link in the far right column for the member you want to remove.
- Click the "Remove Member" button to confirm.

How do I log in to Add/Edit as a team member (or assistant) to do work for the team (or agent)?

You do not need to log in under a separate account. Log in under your own account and you will have access to all of the listings created for the team (or agent) and the ability to add/edit them as prescribed by the team leader (or agent you support) and your base Add/Edit permissions assigned by your broker.

- o ***Note:*** *Listings must be assigned to the Team using the "Team" field in Add/Edit for all team members to have access. See below for instructions.*

How do I ADD a listing for the Team (or for the agent I support)?

- Log in to NorthstarMLS Add/Edit under your own individual account (click the Add/Edit tab from within NorthstarMLS Matrix).
- Add a listing as you normally do.
- For List Agent and Co-List Agent, you may select any agent who is on the team (or the agent you support).
- In the Team Name field, select the name of team. If you are an assistant entering a listing for an agent you support, the agent has probably set up the team name as their own name.
  - o ***Note:*** *If you select yourself as the List Agent and do not want to associate the listing with a team, then leave the Team Name field blank. If you select someone else as the List Agent and do not select a Team Name, then only the List Agent will be able to access and edit the listing (not you or any other team member).*
- Complete and submit the listing. All team members (who have been assigned Add/Edit privileges by the team leader) may access the team listing within Add/Edit.

How do I EDIT a listing for the Team (or for the agent I support)?

- Log in to NorthstarMLS Add/Edit under your own individual account (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click the Property Type from the left side menu and then click the MLS Number link for the listing you want to edit. Edit the listing same as you would any of your own listings. All Team listings will show in your inventory as long as the team leader granted you Add/Edit privileges.

What is the "Login As" function and why would I use it?

The Login As function:
- Allows you to assign any other Active NorthstarMLS user (within your own or another brokerage) with the ability to login to Add/Edit as you, assume your identity and perform all functions within Add/Edit for you with your broker-assigned permissions.
- You can make this assignment to just one person at a time.
- The assignment automatically expires after 30 days unless you manually go in and renew it.
- You may revoke the assignment at any time.
- Applies to the Add/Edit system only, not Matrix or other NorthstarMLS systems.
- When the user you make this assignment to logs in as you, they are working as you. Any tasks they perform will show in the history log as being done by you. That is why we recommend using the Teams function even if you have just one person who supports you. Using the Team function, history logs will always show the actual team member responsible for every action.
- Where Login As works best is when you want to assign another NorthstarMLS user to maintain your listings (for example when out on vacation) who does not have your level of broker assigned permissions. Using Login As, the user you assign assumes whatever permissions you have while logged in as you, even if they don't have that level for their own listings.
- If you are asking a colleague from another brokerage to do Add/Edit tasks for you (for example if you are a one-person shop out on vacation), this is what you would need to use because the Teams function does not allow Add/Edit privileges to team members from other brokerages.

How do I assign "Login As" privileges for my account to another user?

- Log in to NorthstarMLS Add/Edit under your own individual account (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click on "Teams" on the menu in the upper right corner of the screen.
- Click "Assign Login As" on the left side menu.
- Type in the NRDS ID of the user you want to assign in the box provided. If you don't know the person's NRDS ID, look it up in the Roster tab of NorthstarMLS Matrix.
- Click the "Add User" button.
- Read the text in the pop-up box to ensure you are assigning it to the correct person.
- Click the "Agree" button.
- The assignment will automatically expire in 30 days unless you renew it. You may want to put a reminder on your calendar for 30 days out. The system will not automatically remind you.

How do I renew or revoke "Login As" privileges for my account to another user?

- Log in to NorthstarMLS Add/Edit under your own individual account (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click on "Teams" on the menu in the upper right corner of the screen.
- Click "Assign Login As" on the left side menu.
- To renew the "Login As" privileges for another 30 days, click the "Renew" link. Click the "Renew Member" button to confirm.
- To revoke the "Login As" privileges, click the "Remove" link. Click the "Remove Member" button to confirm.

How do "Login As" another user who has assigned the privilege to me?

- Log in to NorthstarMLS Add/Edit under your own individual account (click the Add/Edit tab from within NorthstarMLS Matrix).
- Click on "Login As User" on the menu in the upper right corner of the screen.
- Click to select the user's User ID in the drop-down box.
- Click the Submit button.
- Note at the top of the screen, is says "Logged in as" followed by the user ID of the person you are now logged in as. Also, the Welcome message on screen has the name of the person you are logged in as.
- To switch back to your own account, click the link at the top of the screen "Go back to" followed by your user ID.
- **Be very careful to switch back to your own ID when you are finished working as the other agent.**