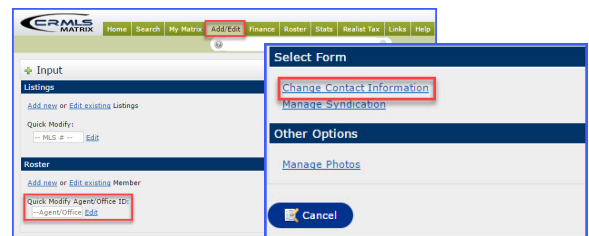# Matrix FAQ Cheat Sheet

## Get the answers you need.

Here are answers to the most common questions CRMLS Customer Care receives. Still need help? We're available 7 days a week at crmls.org/support and (800) 925-1525.
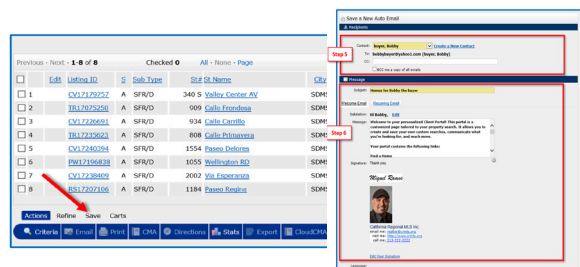
### How do I update my personal contact info in Matrix?

Click the Add/Edit tab. Under Roster, type your Agent or Office ID into the Quick Modify Agent/Office ID field, then click Edit. Under Select Form, click Change Contact Information. Update your information and Preferred Contact Order. When finished, click Submit Member.

### How do I create an automatic email?

From any search results page in Matrix, click Save, then select New Auto Email. Choose a contact (or create a new contact) to receive the email. Type a subject for the email in the Subject field. Matrix will display a default message in the Welcome Email and Recurring Email fields; you may edit these. Select the dates and times you'd like the emails sent. Then click Save.
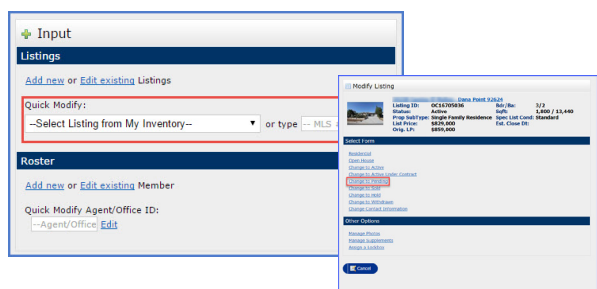
### How do I opt-in to Zillow and Trulia?*

For agents: Click the Add/Edit tab. Under Roster, type your Agent ID into the Quick Modify field and click Edit. Under Modify Member, click on Manage Syndication. To opt-in, find the Syndicate To section, and click the box next to Zillow/Trulia in that section. Finalize by clicking Submit Agent.

### How do I update the status of a listing?

Click the Add/Edit tab. In the Quick Modify drop-down menu, select the listing you want to update. Under the Select Form section, you will see options to change the listing status to Active, Active Under Contract, Pending, Sold, Hold, and Withdrawn. Click the status you want.

From here, you will see a variety of fields that you need to complete, depending on the status. Fill out as many fields as possible. Required fields are highlighted in yellow. When you are done, click Submit Listing.

*Syndication is at your broker's discretion. If "Manage Syndication" does not appear, contact your broker directly to determine your syndication options.

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