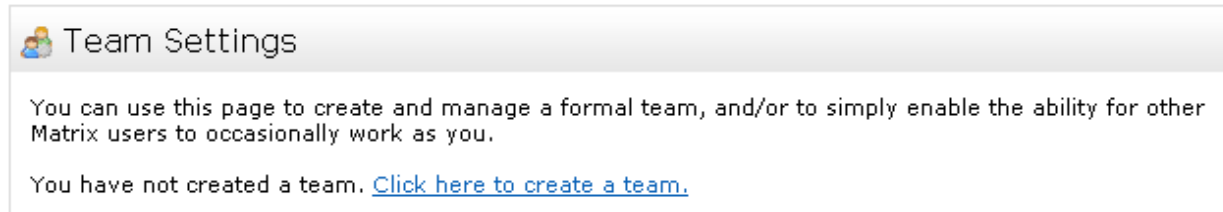


Personal Assistants

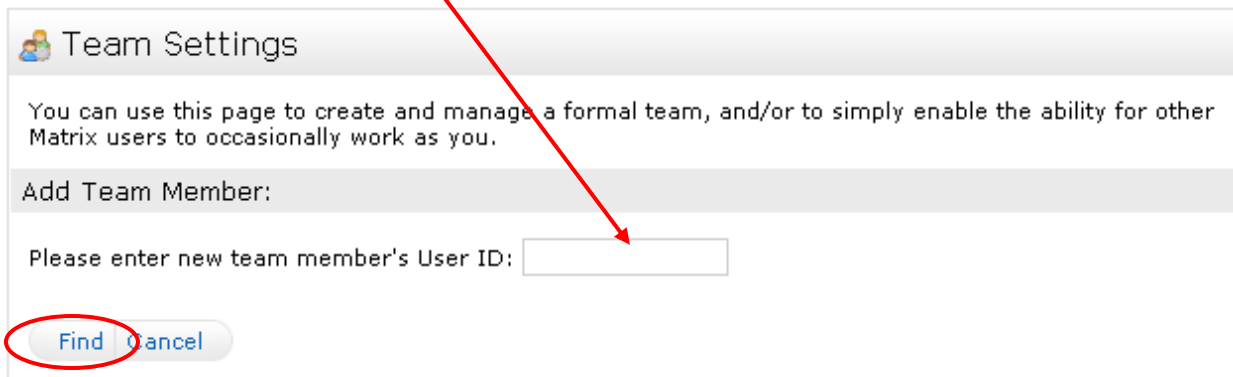
If you are a CMLS agent and have a personal assistant, you can set your assistant up as part of your team and give him/her the ability to perform many Matrix functions for you. In order to achieve this, you need to create your own team within Matrix and assign your assistant to your team.

To set up a Team, go to My Matrix> Settings, then click on the Team Settings link.

Click on the ***Click here to create a team*** link.



On the next screen, enter the ID of your personal assistant and click the Find button- this will assign the user to your Matrix Team.



Team Settings

You can use this page to create and manage a formal team, and/or to simply enable the ability for other Matrix users to occasionally work as you.

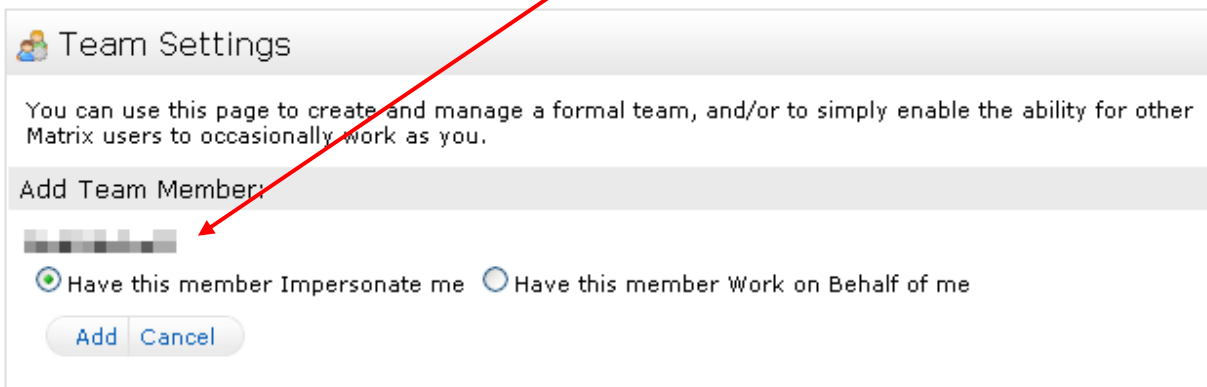
Add Team Member:

Please enter new team member's User ID:

Find Cancel

Note: you cannot do a roster search from this area, so you need to know the ID of the user you want to add before getting to this screen.


After you enter a valid, active user ID and click find, their name will appear and you will have the opportunity to choose how you'd like their team access set up.



Team Settings

You can use this page to create and manage a formal team, and/or to simply enable the ability for other Matrix users to occasionally work as you.

Add Team Member:



☒ Have this member Impersonate me ☐ Have this member Work on Behalf of me

Add Cancel

Impersonate- essentially this means your assistant will assume your identity while in Matrix.

- Emails sent from Matrix appear to the recipient as though they came directly from you- they will have your name and email address as well as your banner/footer and email signature.
- Reports printed from Matrix will appear as though you printed them out yourself- they will have your Print Header/Footer as well as your personal information in the 'Presented By' section at the bottom of the printout.
- Your assistant can also access your Contacts and Saved Searches, but they cannot change your Team settings.

Working on Behalf- the assistant remains logged in under their own identity but emails sent and reports printed indicate that they are working on your behalf.

- Emails will indicate that they are sent on your behalf, but they will have the assistant's name and email address as well as their email banner and signature.
- Reports printed will indicate that they were printed by the assistant on your behalf.
- The assistant can also access your Contacts and Saved Searches, but they cannot change your Team settings.

Once you have added your assistant, you will see the following screen. It shows you how you've set up the assistant (Impersonate or Work on Behalf), gives you the option of adding other team members, and allows you to give your team a name.

Team Settings

You can use this page to create and manage a formal team, and/or to simply enable the ability for other Matrix users to occasionally work as you.

You currently have enabled 1 team member. Each team member has full access to your Matrix account, including your My Matrix tab. **Your teammates can optionally work as you, using their "Working As" hyperlink, located in the top-right corner of Matrix.** [Disable this team feature.](#)

Last	First	Mode	Email	Office Name	Agent Phone
<input type="checkbox"/>	Mitchell	Rob	Works on Behalf of Me robm@ct-mls.com	Greater Fairfield County CML	

[Delete](#) [Add](#)

[Set a Formal Team Name](#)

When your personal assistant is logged into Matrix under their own ID, they have the option to switch to the Team login if they want to work as you. In the upper right corner of the Matrix screen there is a **Working As** link that shows how they are currently logged in. They can click that link and it gives them access to switch to the Team login:

Working as Chris Makowski · Logout

- Switch to Chris Makowski
- Switch to ***The GFC CMLS Team**
- Switch to ***The Very Best Team in The Whole Wide World**

Your personal assistant has to be logged in under the Team ID if they want to have access to any listing input or editing functionality. They will not see the Input tab while logged in as themselves.