

# Migrating Clients from Tempo 5/Fusion to Matrix

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With advanced mapping tools and a modern look-and-feel, the Matrix Client Portal is a consumer-friendly product that can enhance your client's home search process. For your convenience, most of your Clients and Saved Searches from Tempo 5/Fusion have been pulled over into Matrix. You'll notice that the Client Searches in Matrix are not activated; this allows you to determine if and when you migrate clients to the Portal.

TIP: If your client will be closing their transaction soon, you may not want to create a new Portal in Matrix. In that case, don't make any changes to the client in either system and they can continue to use the Tempo 5/Fusion Client Gateway.

## **STEP ONE: REVIEW CONTACTS & SEARCHES IN MATRIX**

Review your Contacts and Searches in Matrix to confirm that the information was migrated accurately and completely from Tempo 5/Fusion. To ensure a proper conversion, contacts in Tempo 5/Fusion must contain a first name, last name and email address. Run the Saved Search in Tempo 5/Fusion and Matrix to verify the search criteria and results are the same.

Most of your current Clients and Saved Searches have been pulled over into Matrix. The Client Searches have not been made Active in Matrix so your client does not receive double emails.

# Migrating Clients from Tempo 5/Fusion to Matrix

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TIP: Run the Saved Search in Tempo 5/Fusion and Matrix to verify the search results are the same.

## STEP TWO: DEACTIVATE TEMPO 5 CLIENT GATEWAY AUTO-NOTIFICATIONS

**Note:** To avoid duplicate notifications, you must deactivate auto-notifications in Tempo 5/Fusion before activating auto-emails in Matrix. You will only need to deactivate auto-notifications in ONE of the legacy systems. If you use Tempo 5 follow the steps below. However, if you use Fusion, continue to Step Three.

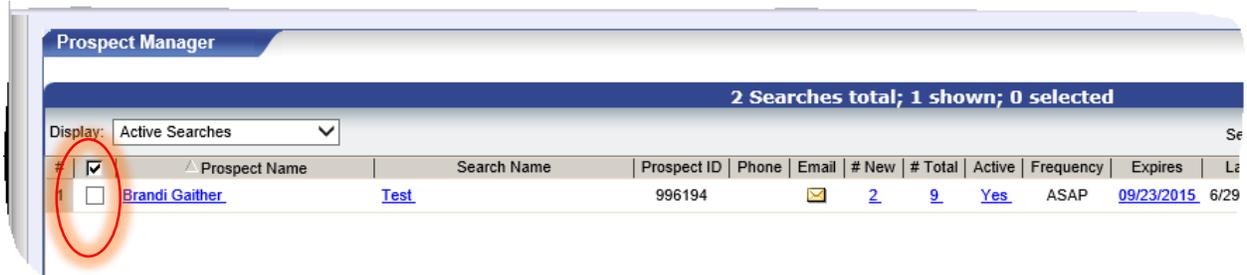
1. Start by logging into Tempo 5.



2. Hover mouse over Prospects and select Prospect Manager.

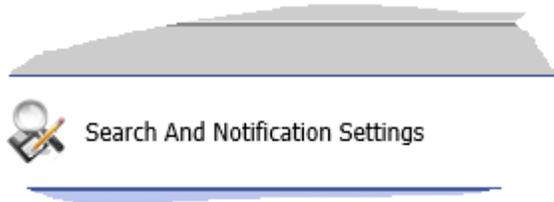
# Migrating Clients from Tempo 5/Fusion to Matrix

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3. The full list of Active Prospects will display on the screen.

4. Place check mark in the box at the upper left corner. Then Click Search and Notification settings at the bottom of the page.



# Migrating Clients from Tempo 5/Fusion to Matrix

Property Search: Test (attached to Brandi Gaither)

**Search Settings**

Save this search as:  Save changes to current search  
 Save as a new search

Search Name:

Search Description: Displayed on the Client Gateway / Private Client View -- make sure it is client-friendly!

Results Grid:

Search Type: Prospect search -- attached to Brandi Gaither

Activate this search: Searches that are active have newly matching listings highlighted in their results list, may be set to send auto-notifications, and are available in Client Gateway / Private Client View.  Yes - Search will expire in  days (maximum 180 days)  
 No

5. Select "No" and click Save at the bottom. Then click "Save".



# Migrating Clients from Tempo 5/Fusion to Matrix

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## **STEP THREE: DEACTIVATE FUSION CONTACT WEBSITE AUTO-NOTIFICATIONS**

**Note:** To avoid duplicate notifications, you must deactivate auto-notifications in Tempo 5/Fusion before activating auto-emails in Matrix. You will only need to deactivate auto-notifications in ONE of the legacy systems. If you have already deactivated auto-notification in Tempo 5, continue to Step Four. Otherwise, follow the steps below to deactivate auto-notifications in Fusion.

1. Logon to Fusion using your login credentials.

# Migrating Clients from Tempo 5/Fusion to Matrix

CoreLogic MarketLinx  
Logged in as: Bobby Gaither  
Home Add/Edit Search Contacts Hotsheet CMA Pu

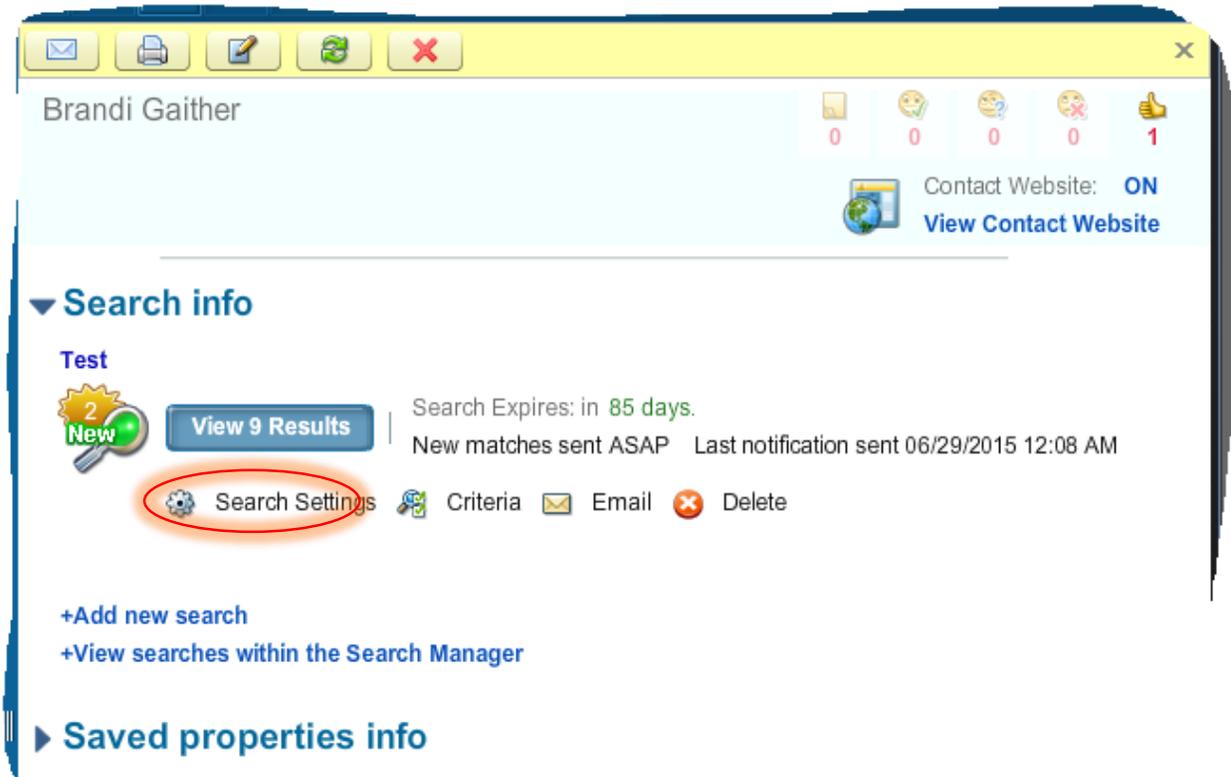
Contact Name, Email or Phone | Default Client Grid | + Add Contact

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	<input type="checkbox"/>	Last	Status	First	Address	Home Phone	Work Phone	Cell Phone	Email								
1	<input type="checkbox"/>	<a href="#">Blow</a>	Active	<a href="#">Joe</a>													
2	<input type="checkbox"/>	<a href="#">Blume</a>	Closed	<a href="#">Judy</a>													
3	<input type="checkbox"/>	<a href="#">Bunny</a>	Active	<a href="#">Bugs</a>													
4	<input type="checkbox"/>	<a href="#">Duck</a>	Active	<a href="#">Daffy</a>													
5	<input type="checkbox"/>	<a href="#">Gaither</a>	Active	<a href="#">Bobby</a>													
6	<input type="checkbox"/>	<a href="#">Gaither</a>	Active	<a href="#">Brandi</a>													
7	<input type="checkbox"/>	<a href="#">Gaither</a>	Active	<a href="#">Dave</a>													
8	<input type="checkbox"/>	<a href="#">Gaither</a>	Active	<a href="#">Penelope</a>													
9	<input type="checkbox"/>	<a href="#">Martian</a>	Inactive	<a href="#">Marvin</a>													
10	<input type="checkbox"/>	<a href="#">Test2</a>	Active	<a href="#">Test2</a>													

2. Select the contact you want to deactivate auto-notifications for and notice the “Split Screen”.

# Migrating Clients from Tempo 5/Fusion to Matrix

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3. Click “Search Settings”

# Migrating Clients from Tempo 5/Fusion to Matrix

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Search Settings

Save as a new search  Save changes to current search

SEARCH NAME: \*

Settings Frequency Contact Email Agent Notification

Link this search to this contact

Turn on auto-notification for this search. Notifications will stop in  days (maximum 180)

I want Brandi to view listings in the Contact Website [Customize welcome message](#)

I want Brandi to view listings in an emailed report

SEARCH DESCRIPTION

RESULTS GRID

4. Uncheck “Turn on auto-notification for the search”. Then click “Save”

# Migrating Clients from Tempo 5/Fusion to Matrix

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## **STEP THREE: ACTIVATE THE PORTAL**

**Before you begin:** remember, first impressions are critical! Before you activate auto-emails and provide clients with access to the Portal, take a few minutes to personalize your Portal with a custom header/footer, home page message and contact information. Visit the My Matrix tab to set up your custom preferences.

Your Saved Searches from Tempo 5/Fusion will display in Matrix and be attached to your client. Each Saved Search Auto-Notification will need to be made Active on a search-by-search basis. Imported in parenthesis indicates that the search was pulled from Tempo 5/Fusion. If a “Saved Search” pulled from Tempo 5/Fusion has an asterisk (\*) next to Imported the Saved Search did not pull over for any number of reasons. If that is the case you will want to recreate the search in Matrix.

# Migrating Clients from Tempo 5/Fusion to Matrix

1. Start by logging into Matrix. Then click “My Matrix” then “Saved Searches”

MLSOK Home Search Stats My Matrix Realist Tax Links Finance Input Market R

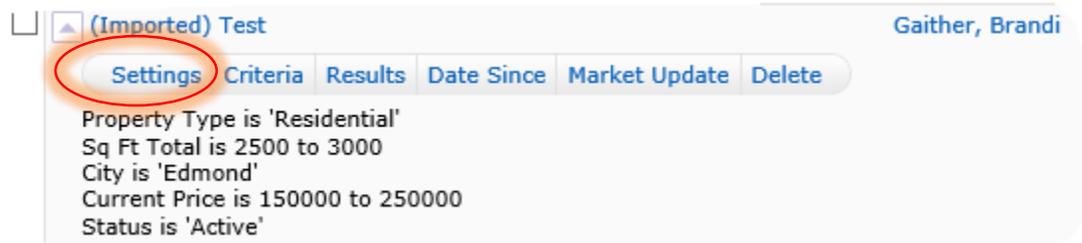
Concierge Alert! [1 auto email, 13 listings.](#)

Saved Searches (12) Search:

<input type="checkbox"/>	Subject	Contact Name
<input type="checkbox"/>	(Imported) Affiliate Search	
<input type="checkbox"/>	(Imported) BG > 250K & >2000 Yr Built	
<input type="checkbox"/>	(Imported) BG 250K to 300K 5 Shape	
<input type="checkbox"/>	(Imported) Edmond 250K to 300K	
<input type="checkbox"/>	(Imported) GoMLSOK Test	
<input type="checkbox"/>	(Imported) Piedmont 200 - 250K	
<input type="checkbox"/>	(Imported) Seller CMA for Brandi Gaither	
<input type="checkbox"/>	(Imported) Test	Gaither, Brandi
<input type="checkbox"/>	(Imported) Test 2 6/13/13	
<input type="checkbox"/>	(Imported) Test 4/4/2014	
<input type="checkbox"/>	Edmond 150 - 250K	Gaither, Cynthia
<input type="checkbox"/>	My Market	

2. Click on the name of the “Saved Search.”

# Migrating Clients from Tempo 5/Fusion to Matrix

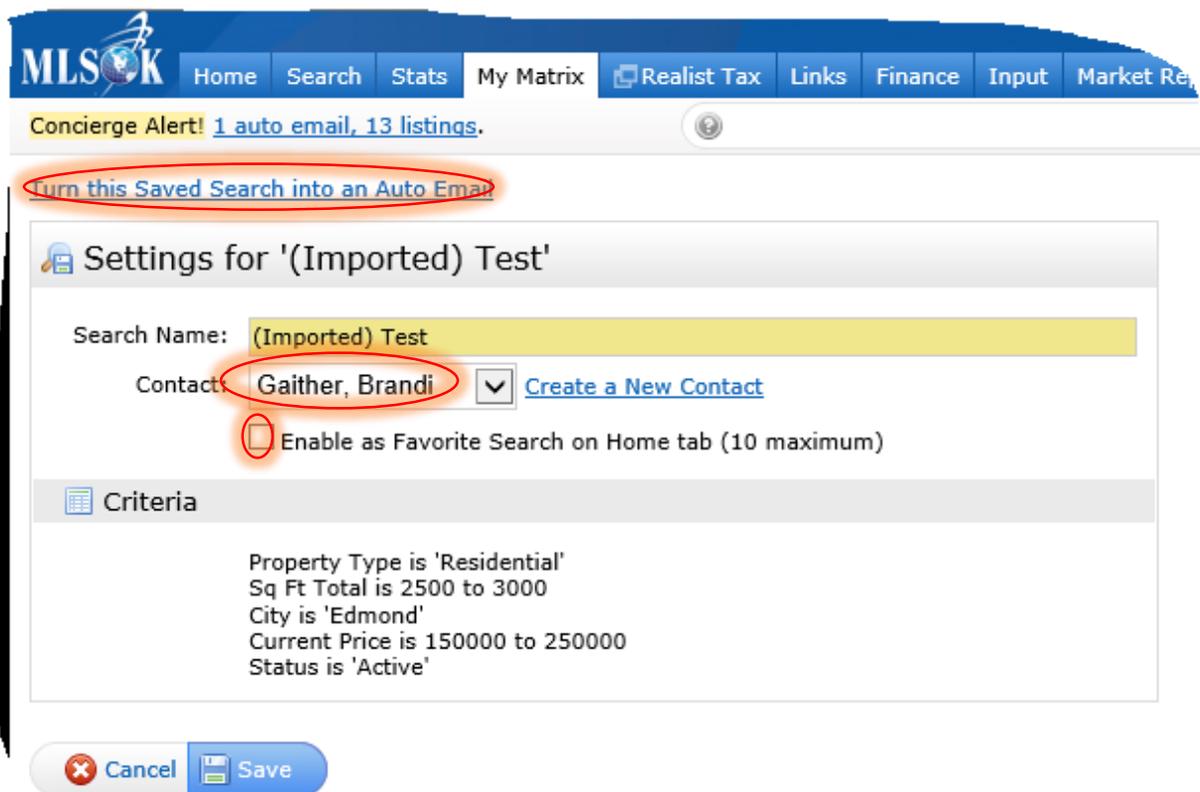


(Imported) Test Gaither, Brandi

**Settings** Criteria Results Date Since Market Update Delete

Property Type is 'Residential'  
Sq Ft Total is 2500 to 3000  
City is 'Edmond'  
Current Price is 150000 to 250000  
Status is 'Active'

3. Click the “Settings” tab.



MLSOK Home Search Stats My Matrix Realist Tax Links Finance Input Market Re...

Concierge Alert! 1 auto email, 13 listings.

Turn this Saved Search into an Auto Email

Settings for '(Imported) Test'

Search Name: (Imported) Test

Contact: Gaither, Brandi Create a New Contact

Enable as Favorite Search on Home tab (10 maximum)

Criteria

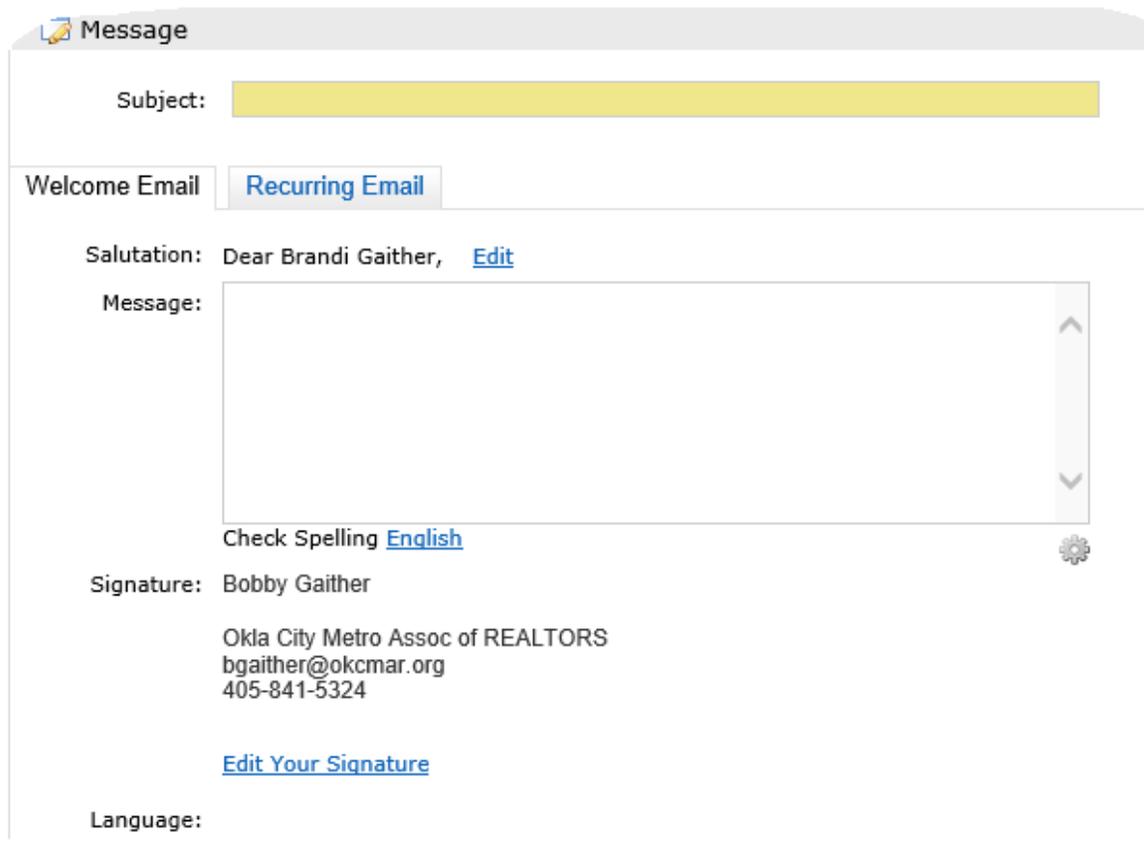
Property Type is 'Residential'  
Sq Ft Total is 2500 to 3000  
City is 'Edmond'  
Current Price is 150000 to 250000  
Status is 'Active'

Cancel Save

# Migrating Clients from Tempo 5/Fusion to Matrix

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4. Verify the Contacts Name in which the Saved Search is associated. Click “Turn this Saved Search into an Auto Email”.
5. The Recipients will default to the Contact’s Information you just attached to. If you wish to change this, click the drop-down menu and select a different contact.

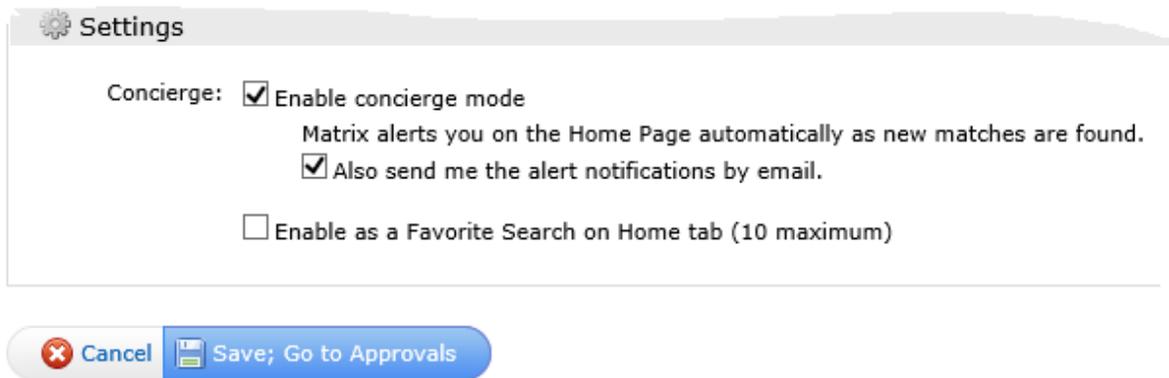


The screenshot shows a software interface for configuring an email message. At the top, there is a title bar with a pencil icon and the word "Message". Below this is a "Subject:" field with a yellow background. Underneath are two tabs: "Welcome Email" and "Recurring Email", with "Recurring Email" being the active tab. The "Salutation:" field contains "Dear Brandi Gaither," followed by an "Edit" link. Below that is a large text area for the "Message:" with a vertical scrollbar on the right. Under the message area is a "Check Spelling" option with a dropdown menu set to "English" and a gear icon. The "Signature:" field contains the name "Bobby Gaither" and the following text: "Okla City Metro Assoc of REALTORS", "bgaither@okcmar.org", and "405-841-5324". Below the signature is an "Edit Your Signature" link. At the bottom, there is a "Language:" field.

# Migrating Clients from Tempo 5/Fusion to Matrix

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6. Write a subject line message to your client with information about the new Portal format they will now be using to view properties. (NOTE: A subject line is required to setup the email).



The screenshot shows a 'Settings' dialog box with a gear icon in the top left corner. The title bar reads 'Settings'. Below the title bar, there is a section labeled 'Concierge:'. Under this section, there are three options, each with a checkbox:

- Enable concierge mode  
Matrix alerts you on the Home Page automatically as new matches are found.
- Also send me the alert notifications by email.
- Enable as a Favorite Search on Home tab (10 maximum)

At the bottom of the dialog box, there are two buttons: a 'Cancel' button with a red 'X' icon and a 'Save; Go to Approvals' button with a blue background and a document icon.

7. You may also select the options to enable the Concierge Mode or save the search as a Favorite to display your Home Page. Concierge mode allows you to pre-approve listings before they are sent to a client.
8. Schedule the frequency for your Client's notifications.
9. Then Click "Save; Go to Approvals".