Migrating Clients from Tempo 5/Fusion to Matrix

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.

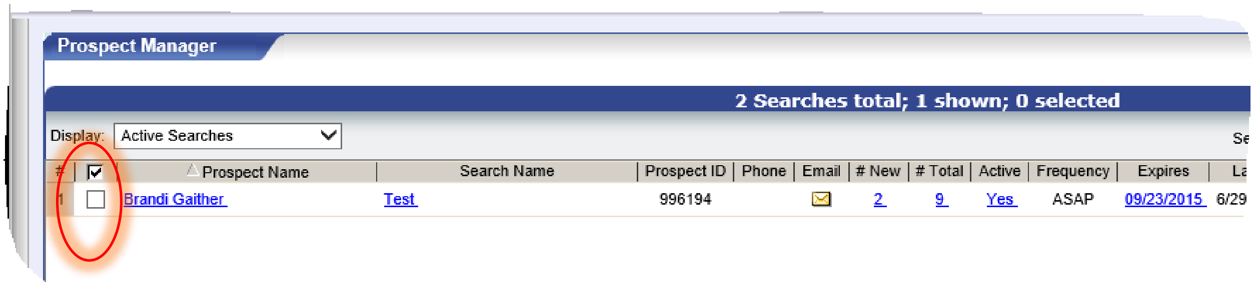
TIP: Run the Saved Search in Tempo 5/Fusion and Matrix to verify the search results are the same.

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.

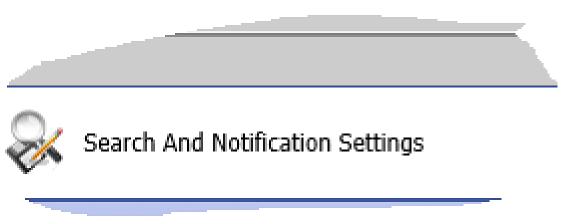
1. Start by logging into Tempo 5.

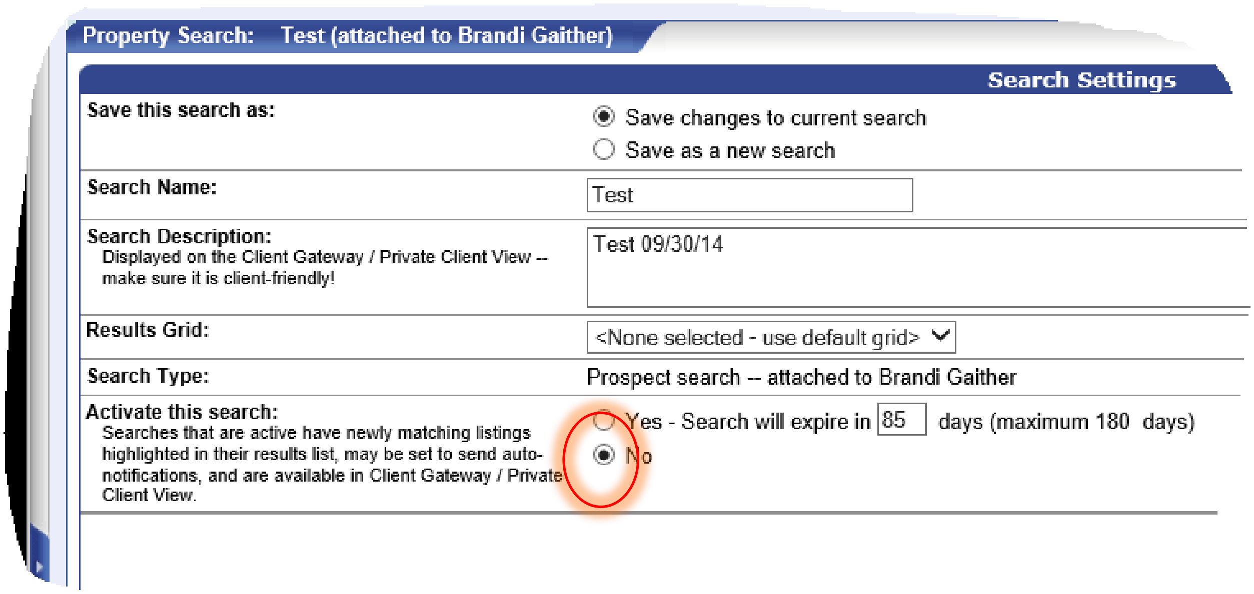
2. Hover mouse over Prospects and select Prospect Manager.



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.



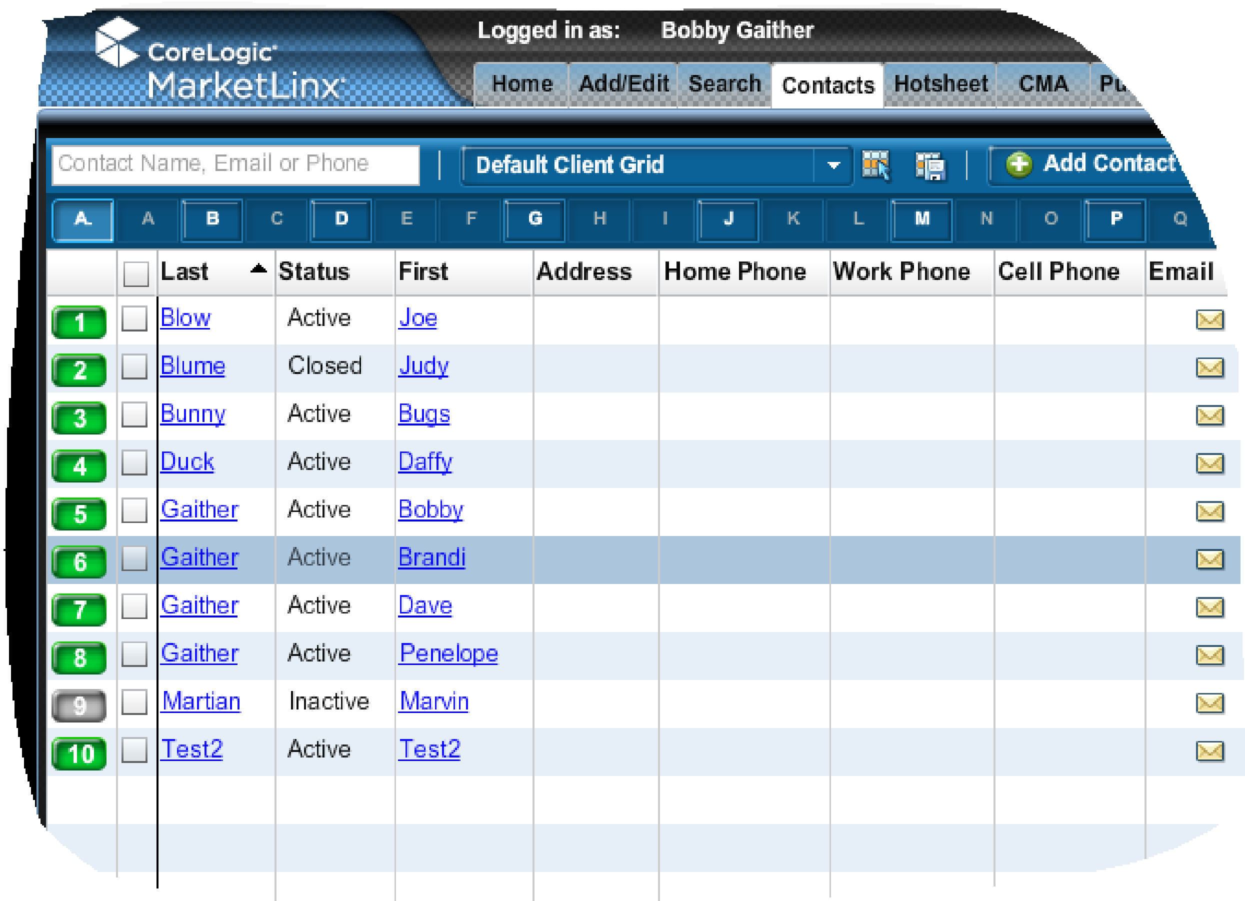


5. Select “No” and click Save at the bottom. Then click “Save”.

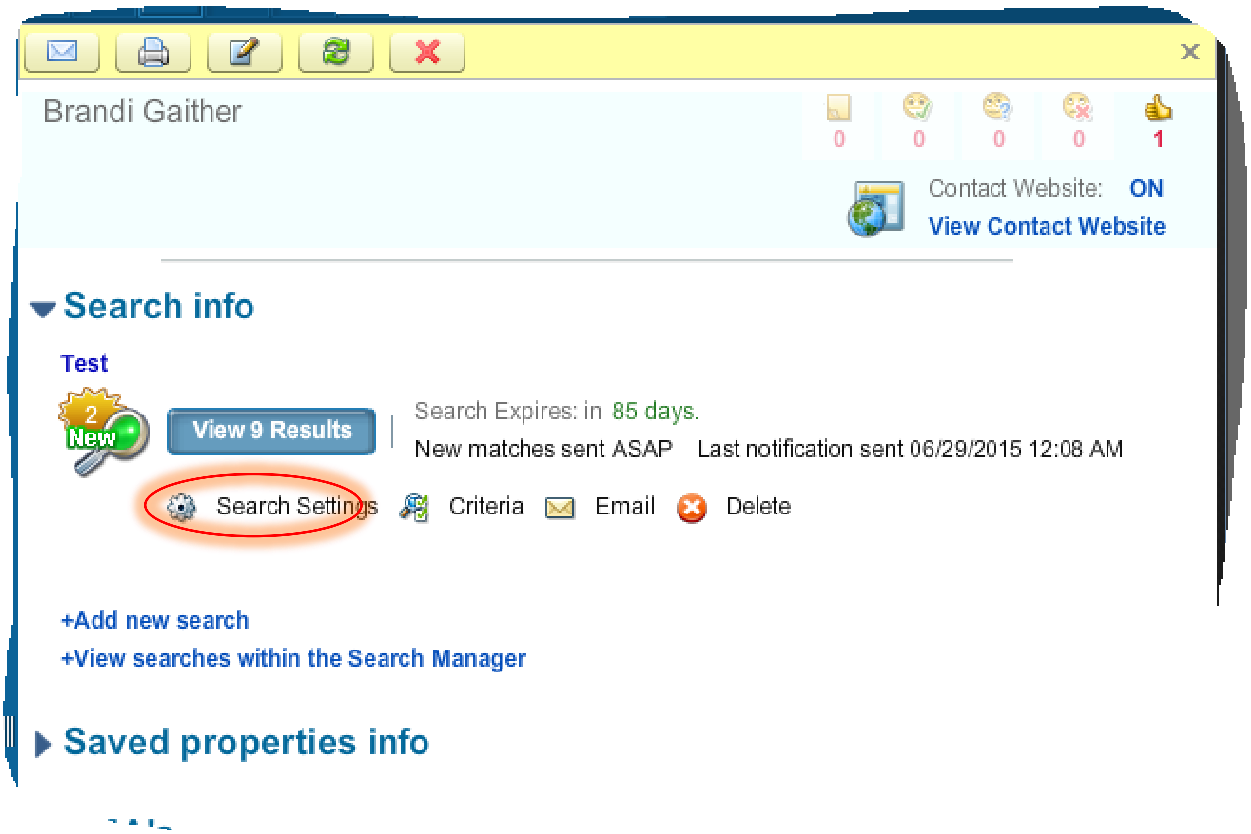
STEP THREE: DEACTIVATE FUSION CONTACT WEBSITE AUTO-NOTIFICATIONS

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.

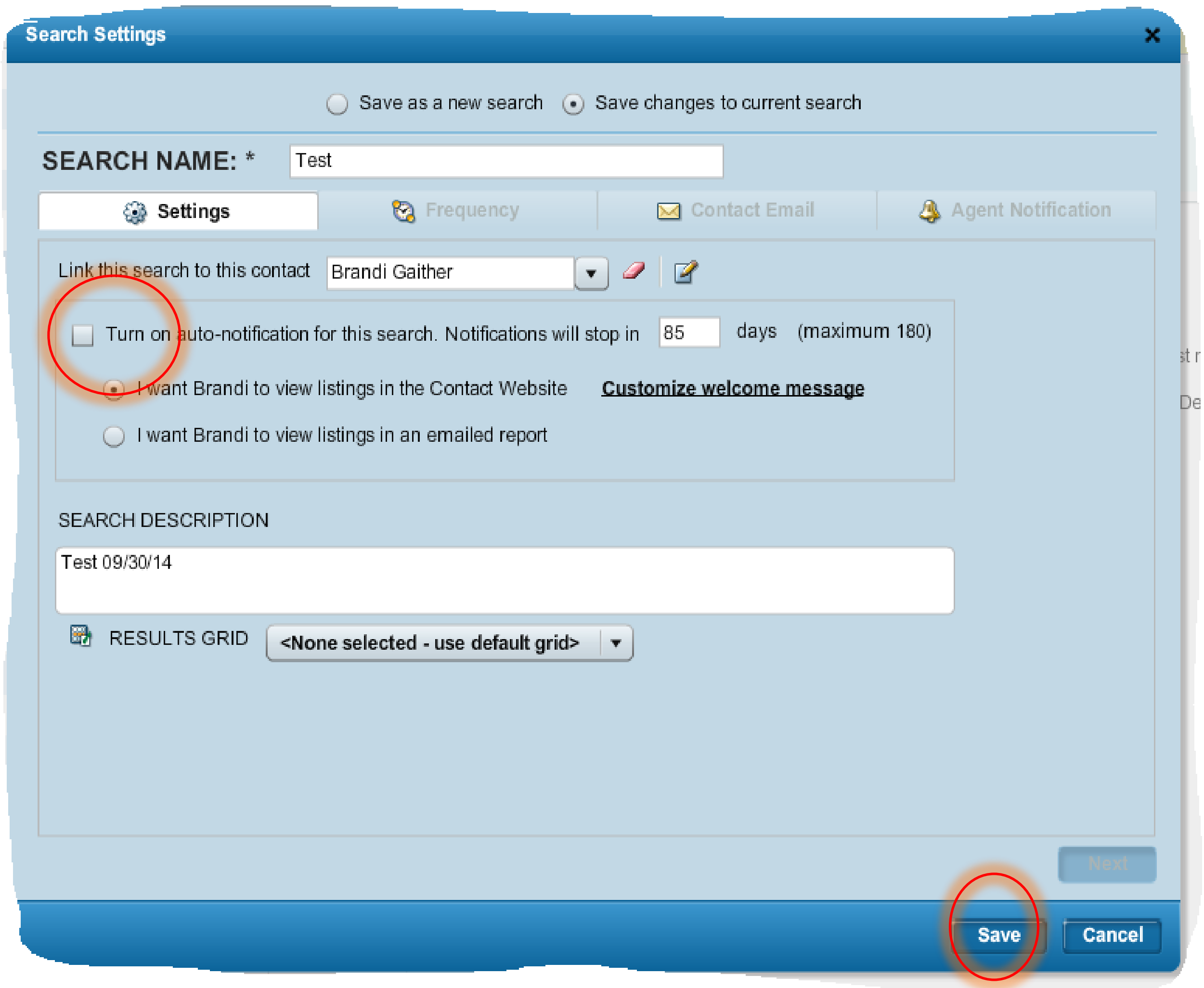
1. Logon to Fusion using your login credentials.



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



3. Click "Search Settings"



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

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.

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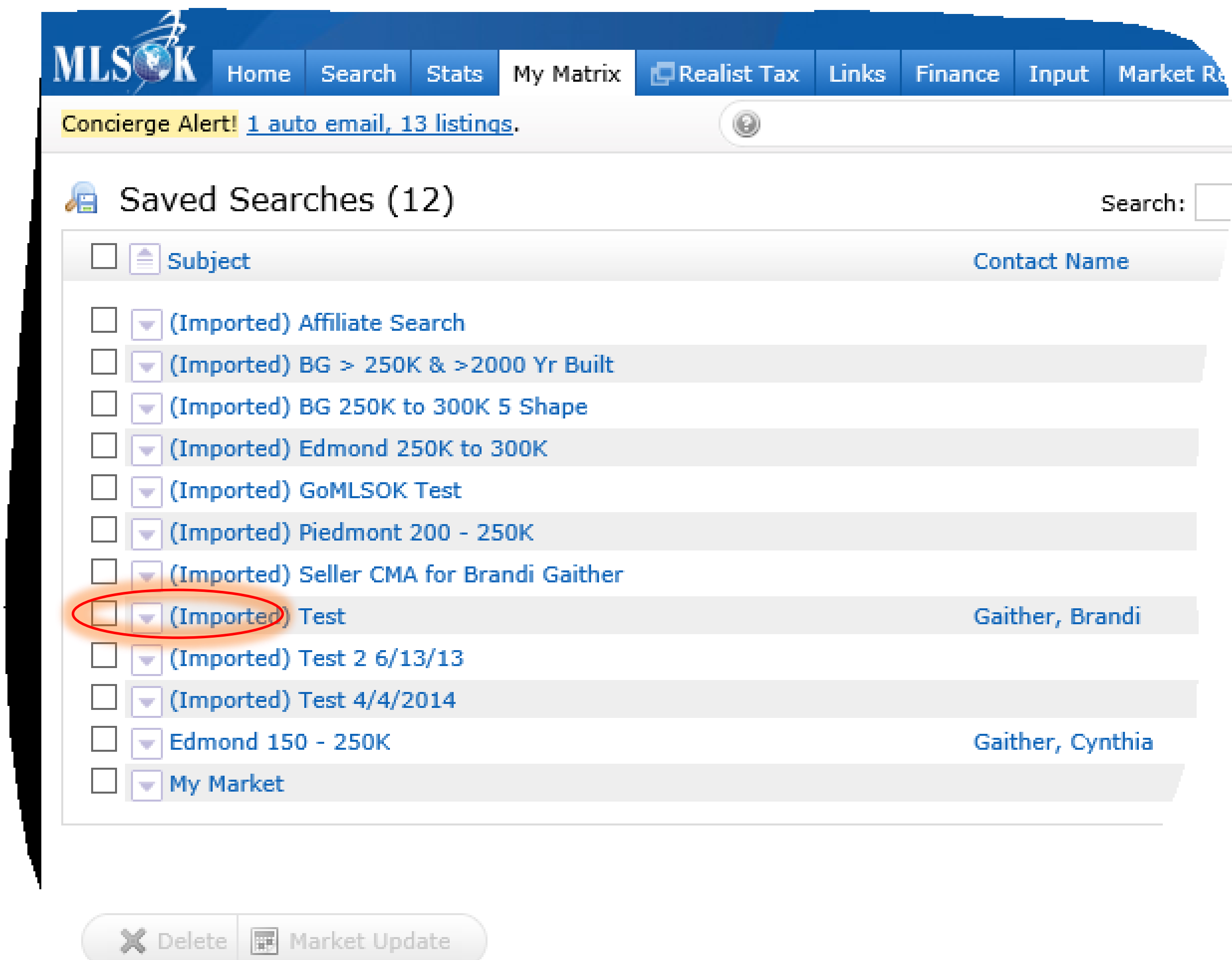
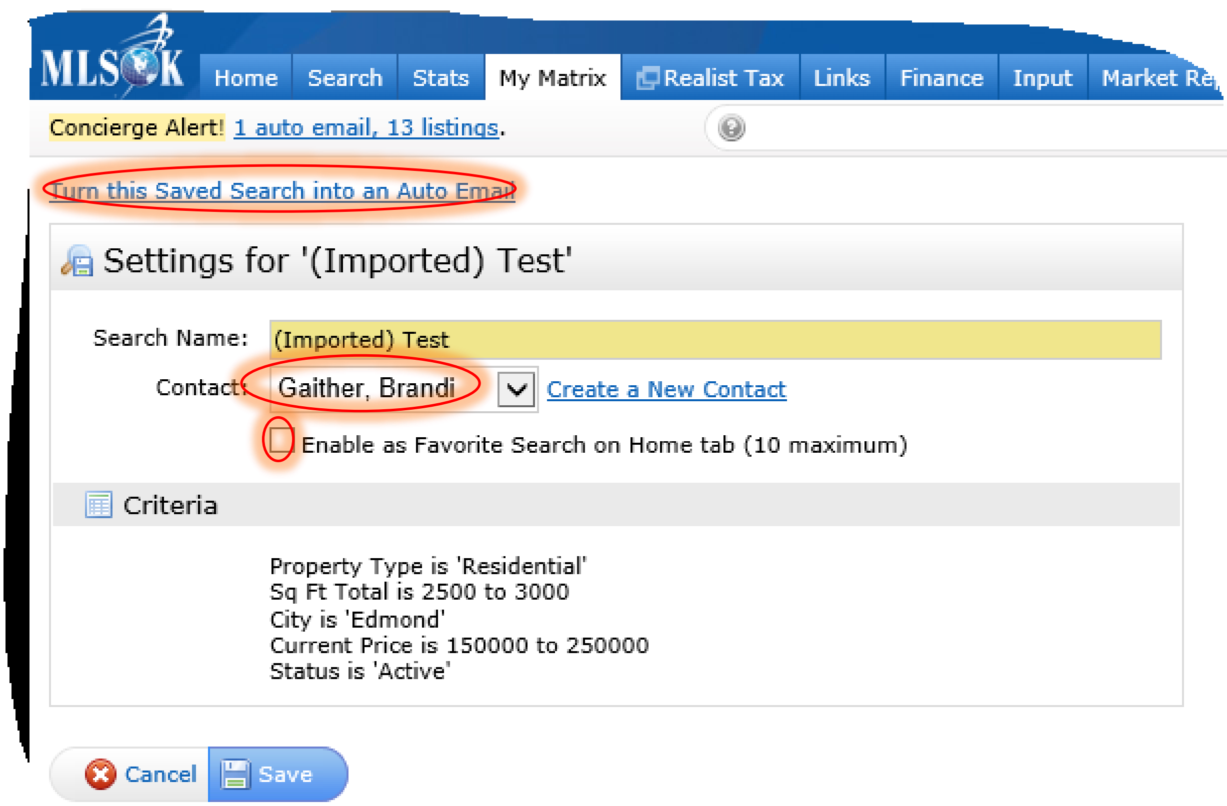
1. Start by logging into Matrix. Then click "My Matrix" then "Saved Searches"

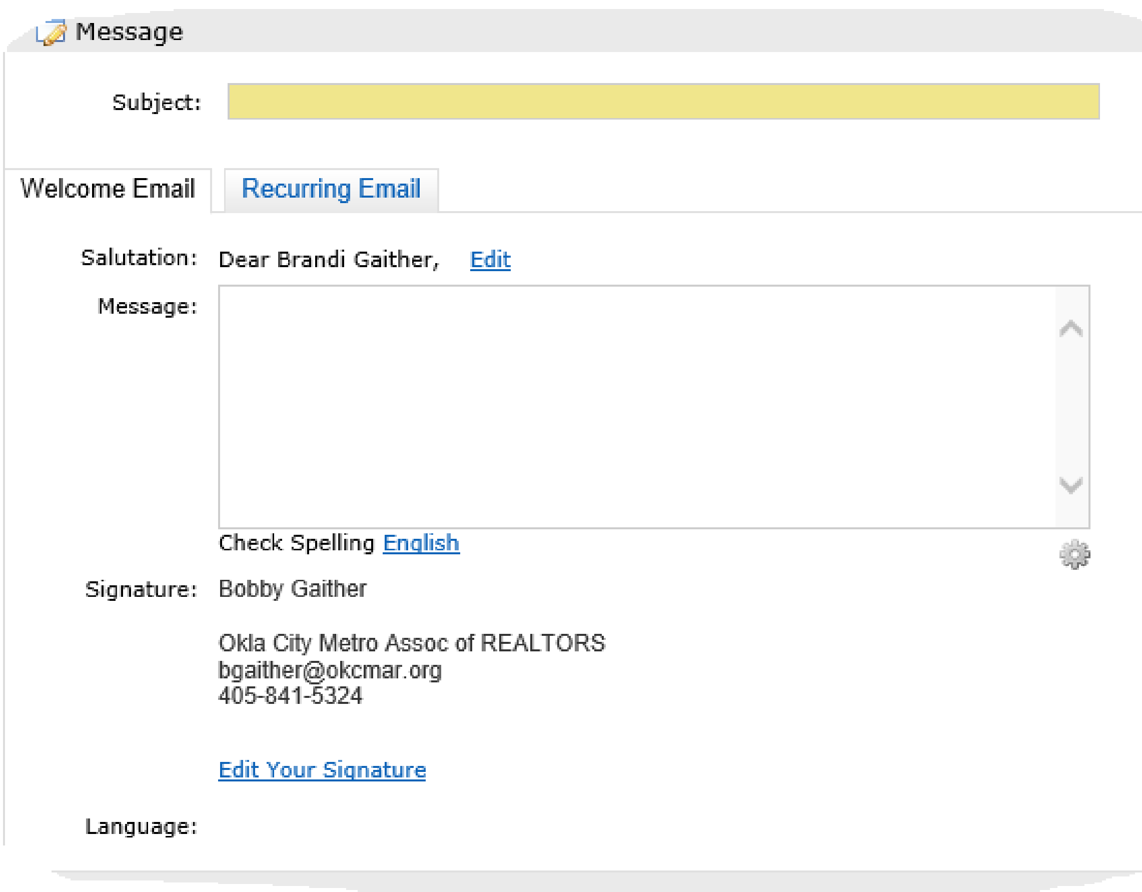


2. Click on the name of the "Saved Search."

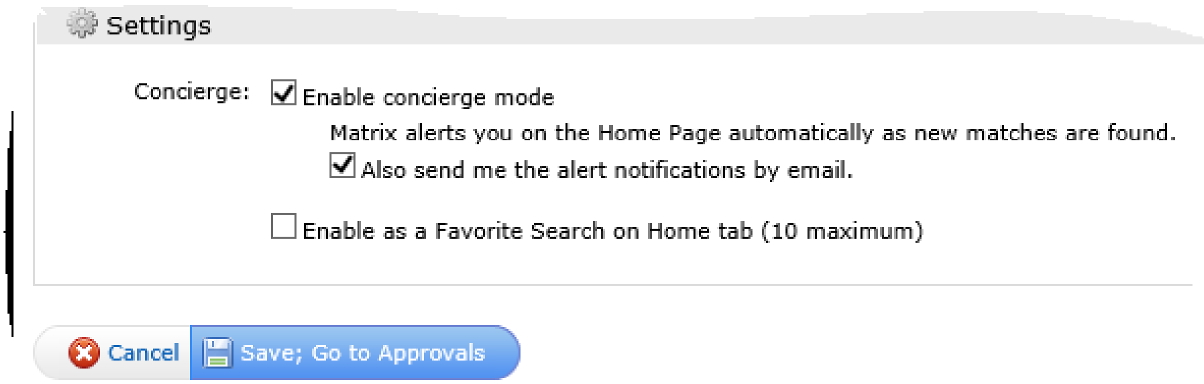
3. Click the "Settings" tab.



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.



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).



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".