

# Fast Track Your Listings (With Matrix and Transaction Desk)

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## Description:

Want to get your listings entered faster and make them go further? In this 1-hour course, we will demonstrate how to take this listing entry process completely paperless with Transaction Desk! This INLCLUDED benefit will eliminate the need to re-enter the listing data that you have already collected into the MLS! Did you know you can populate tax and previous listing data onto the listing forms? We know your time is valuable, so let us show you how to maximize efficiency in the listing entry process!

In this course, you will also learn how to use the listing share feature that allows you to share a direct link to your branded listing to drive buyer traffic back to you! We will also demonstrate reverse prospecting, which allows you to proactive and connect with those buyer agents out there that have searches in the MLS that match your listing!

Attend this course to make the listing process as STELLAR as it can be

**Course Type:** Hands-on

**Course Length:** 1 hour (no break)

## Class Agenda

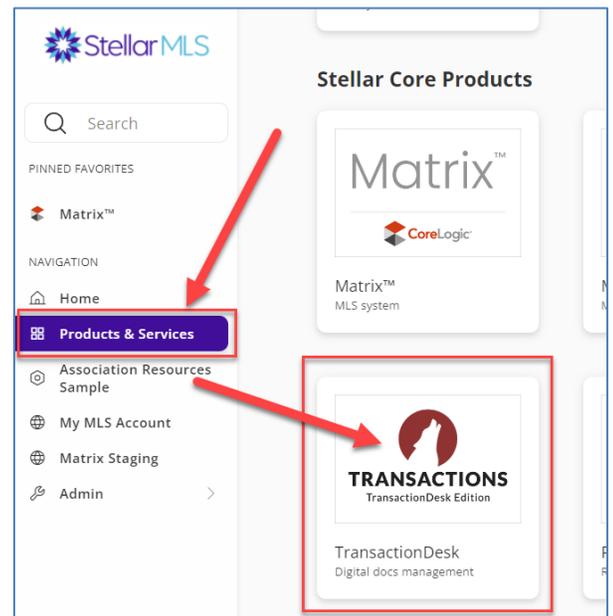
1. Listing Entry Through TransactionDesk
2. Reverse Prospecting
3. Listing Share Feature

## How To Upload a Listing Through Transaction Desk

Have you gone through the listing entry process manually? Gathering the data and THEN having to enter it manually in Matrix? Hopefully – this process will help streamline the listing entry process.

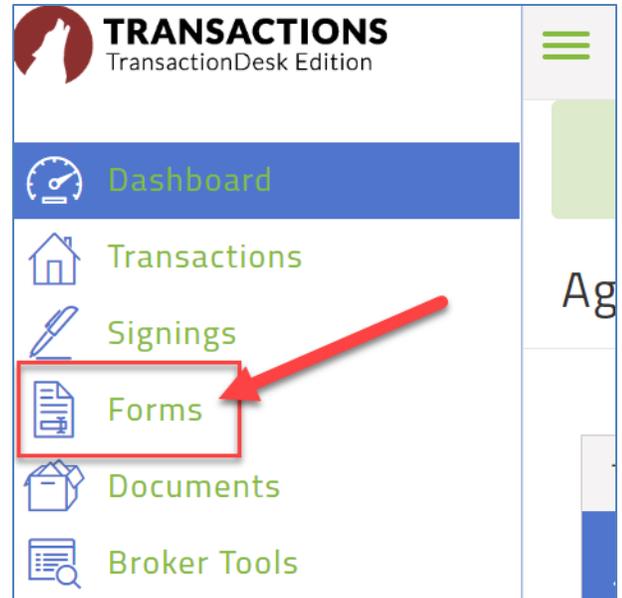
**Note – Even if your office does not use Transaction Desk for their online paperless solution – you can use this process JUST for the listing entry. This process is ONLY available as shown in Transaction Desk. (Listing upload exists in Forms Simplicity, but the forms cannot be populated based on MLS or Public Records Data).**

### Step 1 – Access Transaction Desk from Products & Services in Stellar Central

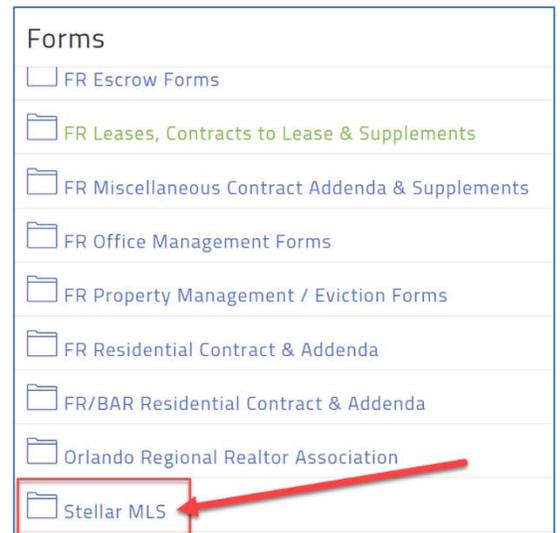


**Step 2 – Click on the “Hamburger? Menu at the top left, and then click on the FORMS button inside of Transaction Desk**

**(Note – this same process can be done as a part of a transaction)**

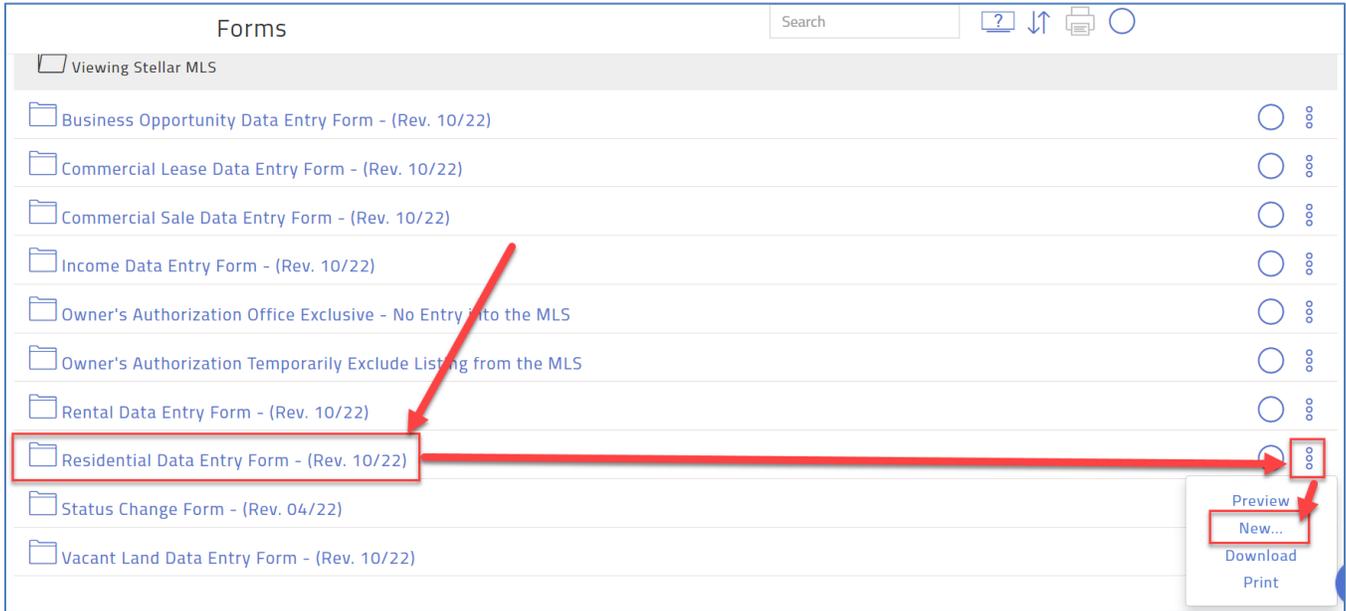


**Step 3 – Scroll down and open the Stellar MLS folder**

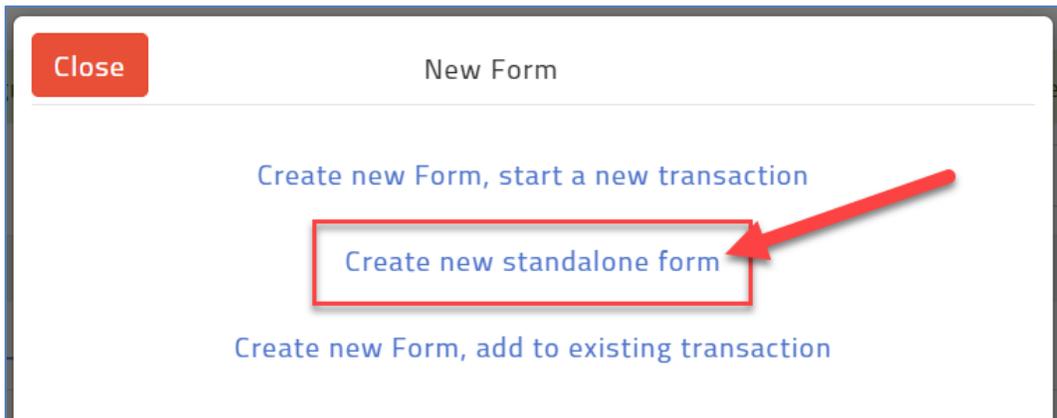


**Step 4 – Choose the Listing Form Type**

Locate the desired listing form, click on the elliptical menu on the right, and then select “New”  
(Note, make sure to choose the latest version of the form)

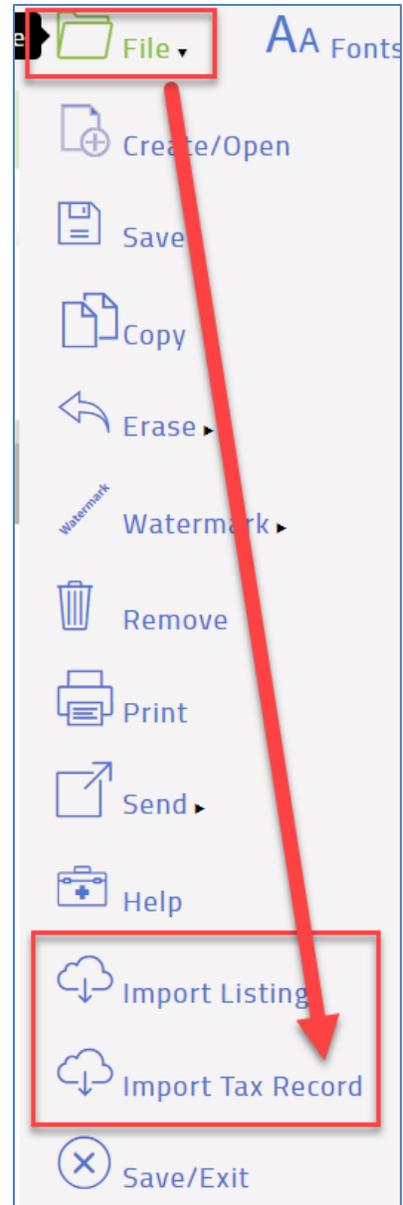


**Step 5 – Create a new standalone form**



### Step 6 – Start the Auto-Populate

Click on File from the top menu, and then choose “Import Tax Record” OR “Import Listing” (if the property has been in the MLS before) – Note if the property has been previously listed, you will need to make sure all of the data is then updated for your new listing.



**Step 7 – Choose the county and fill out the street number and the street name. (Without Rd, St, Blvd, etc.) and then click SEARCH.**

Close Import Tax Record Import

Import Tax Record

Parcel Number:

County: Polk

Search Tax Records by Address or Owner

Enter Street Number: 13

Enter Street Name: Rosewood

Owner Last Name:

Search

**Step 8 – Click on the Parcel ID - it will populate into the field above – then click on IMPORT at the top right.**

Close Import Tax Record Import

Import Tax Record

Parcel Number:

County: Polk

Search Tax Records by Address or Owner

Enter Street Number: 13 Search

Enter Street Name: Rosewood

Owner Last Name:

Parcel Number: 27-26-29-707020-003132

13 Rosewood Dr, Davenport John Kevin Lipscomb

Close Import Tax Record Import

Import Tax Record

Parcel Number: 27-26-29-707020-003132

County: Polk

Search Tax Records by Address or Owner

Enter Street Number: 13 Search

Enter Street Name: Rosewood

Owner Last Name:

Parcel Number: 27-26-29-707020-003132

13 Rosewood Dr, Davenport John Kevin Lipscomb

**Step 9 – The tax info (or listing info) should now be populated directly onto the listing form!**

**StellarMLS**  
RESIDENTIAL LISTING DATA ENTRY FORM

Indicates Multiple Choice    Indicates Single Choice    \* Indicates Required Field

**LISTING INFORMATION**

**Listing Contract Date** [Calendar icon] [ ]    **List Price\*** [ ]    **Expiration Date\*** [Calendar icon] [ ]    **Special Sale Provision\***

**Listing Type\***    **Listing Service Type\***    **Representation**

Exclusive Agency     Exclusive Right to Sell     Full Service     Seller Represented

Exclusive Right with Exception     Exclusion/Variable Commission     Limited Service     Seller Not Represented

Auction     Probate Listing

Bank-Owned/REO

Short Sale

None

Government Owned

**ADDRESS**

**Street Number\*** [13]    **Street Dir Pre** [ ]    **Street Name\*** [Rosewood]    **Street Type** [DRIVE]    **Street Dir Post** [ ]

**Unit Number** [ ]    **No Unit #**     **City\*** [DAVENPORT]    **State\*** [FL]    **Zip\*** [33837]    **Zip + 4** [9782]

**County\*** [Polk]    **Country\*** [ ]    **Development** [ ]

**Step 10 – Complete the rest of the listing form as normal, and then click on UPLOAD from the top bar. This will generate your MLS ID as an incomplete listing.**

TransactionDesk now integrates with Boost – the easiest way to advertise yourself and your listings to your sphere and beyond. [Start advertising.](#)

**StellarMLS**  
RESIDENTIAL LISTING DATA ENTRY FORM

Indicates Multiple Choice

**LISTING INFORMATION**

**Listing Contract Date** [Calendar icon] [11/28/2022]    **List Price\*** [1,000,000.00]    **Expiration Date\*** [Calendar icon] [10/ ]

**Listing Type\***    **Listing Service Type\***    **Representation**

Exclusive Agency     Exclusive Right to Sell     Full Service     Seller Represented

Exclusive Right with Exception     Exclusion/Variable Commission     Limited Service     Seller Not Represented

Short Sale

None

Government Owned

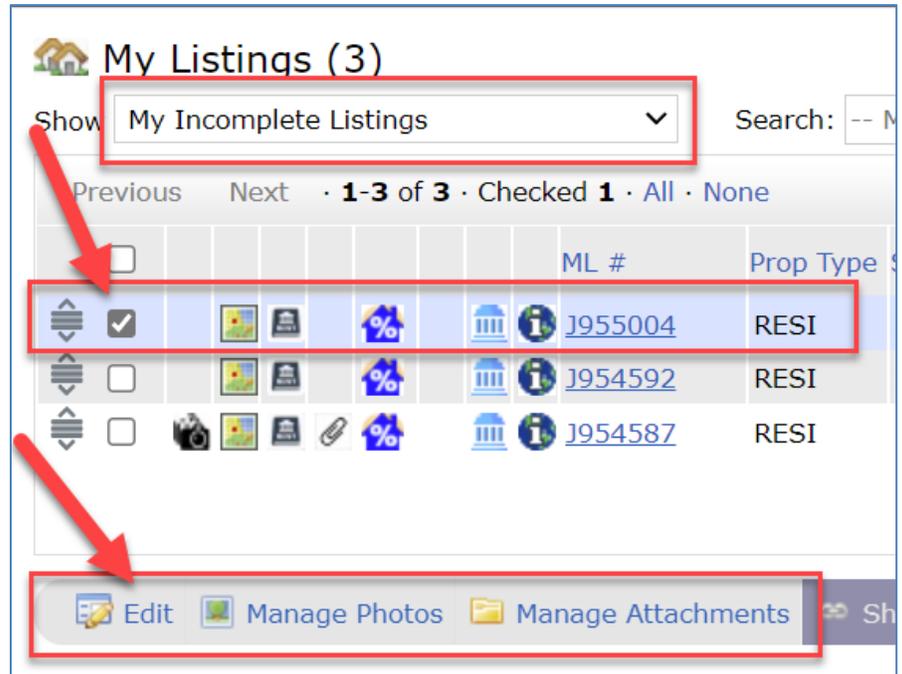
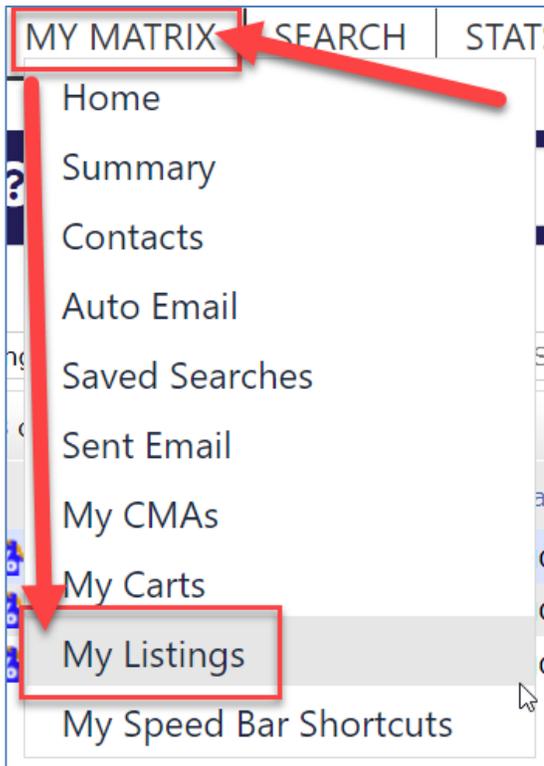
**Upload Results**

Close

Your listing has been uploaded to Matrix as Incomplete.  
Your listing's ML # is J955004.

**Step 11 – Head back into Matrix to finish your listing!**

**Locate your new listing under My Matrix > My Listings. Make sure to filter by incomplete listings. Add your pictures/attachments and then submit the listing as active!**



**Things to remember –**

**The listing upload will ONLY work if you have permission to add and edit their own listings. (Completed the Adding & Editing Course AND have Broker's Authorization).**

**To stay in compliance with Stellar MLS this form must be signed by the seller/sellers. This can be a physical form (Print it out) or via e-signature.**

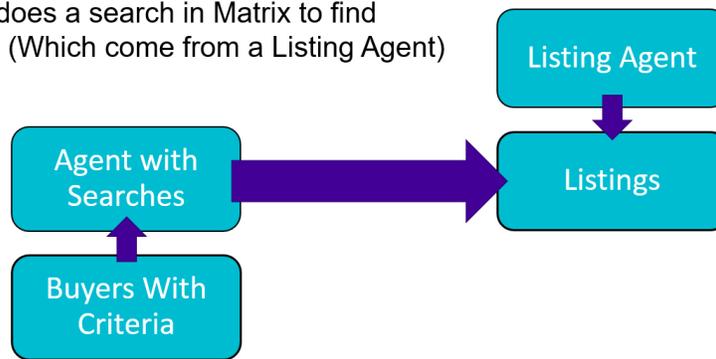
## What is Reverse Prospecting?

Reverse Prospecting is a marketing tool in Matrix that allows you to see which buyer agents out there have searches (Auto-Emails) that match your listing.

**NOTE – You will NOT know who the other agent's buyer(s) will be.**

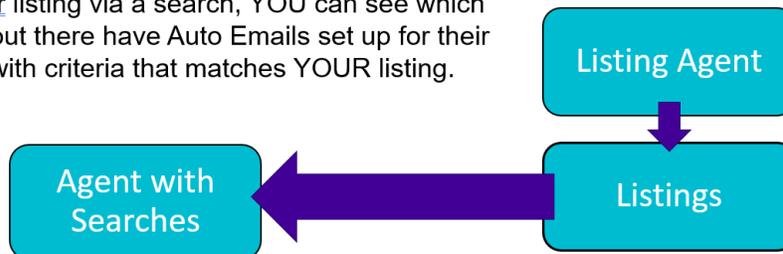
## What is Prospecting?

Prospecting is Searching! An Agent with a Buyer does a search in Matrix to find listings (Which come from a Listing Agent)



## Reverse Prospecting is the Opposite!

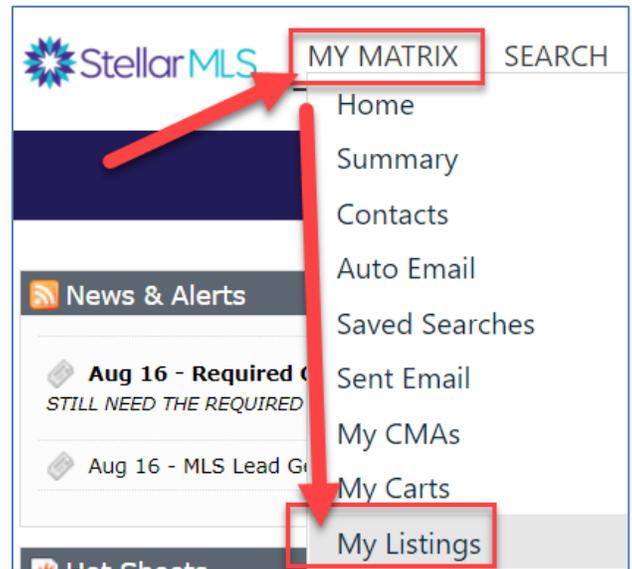
Instead of the Agent with the Buyer finding you and your listing via a search, YOU can see which agents out there have Auto Emails set up for their buyers with criteria that matches YOUR listing.



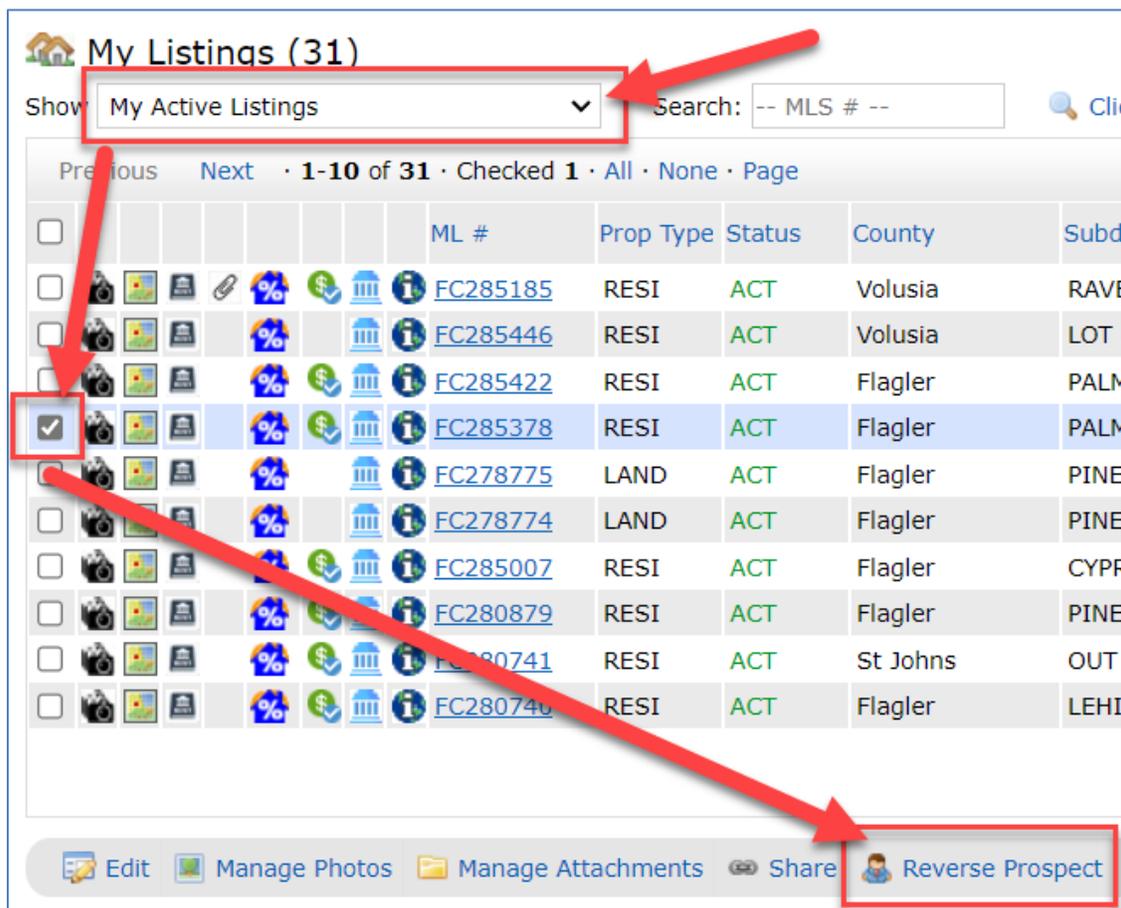
**NOTE:** Reverse Prospecting is completely anonymous for your buyers. List agents are not given your customer names or contact information.

## How to Reverse Prospect A Listing

**Step 1 – Access “My Listings” under the My Matrix Menu**



**Step 2 – Change the Display Dropdown to Show Active Listings, Select the One You Want To Use, and Click the Reverse Prospect Button Below**



# How to Read the Reverse Prospecting List

**Note – It is easiest to read the Reverse Prospecting List from left to right**

*“This Agent has this buyer (Ref #) who has been sent a total of # properties (Count). Your listing hit their portal on (Date Sent) and that customer has potentially marked it as a favorite (Folder Icon)”*

Agent	Ref #	Pre-approved?	✉	Count	Date Sent	📁	Email
JON PAGAN	39469			22	never	❤️	<a href="mailto:chrispagan@netzero.net">chrispagan@netzero.net</a>
Brian Nixon	83816			136	08/11/2022	❤️	<a href="mailto:bknixonrealtor@gmail.com">bknixonrealtor@gmail.com</a>
JOHNNY Lipscomb II	70531	✔️	✉️	697	11:05 AM	❤️	<a href="mailto:John.Lipscomb@stellarms.com">John.Lipscomb@stellarms.com</a>

Field	What This Means
Agent	This Agent has an Auto Email set up in Matrix with criteria that matches your listing. Clicking on their name will open an email menu.
Ref #	This is the reference number for their buyer contact. This can be given to the buyer agent so they can look up their buyer.
Pre-Approved	A green checkmark will indicate that the buyer agent’s contact has been pre-approved for a mortgage.
Envelope	The envelope icon will appear after you’ve emailed the buyer agent by clicking on their name.
Count	Count is the total number of listings each contact has been sent.
Date Sent	This is the date that your listing was sent to the buyer agent’s contact.
Folder	This will indicate if the buyer agent’s contact has market the listing as a favorite, etc.

## Reaching out to the Agent with the Buyer

Step 1 – Click on the Agent’s name

**Reverse Prospect Results for FC285378**

These agents each have a contact who has received this listing. Click the agent name your listing. They can identify the contact via the Reference # by looking it up on their Count is the total number of listings each contact has been sent.

39 PINE HURST LN, PALM COAST

Agent	Ref #	Pre-approved?	✉	Count	Date Sent	📁
JON PAGAN	39469			22	never	❤️
Brian Nixon	83816			136	08/11/2022	❤️
<b>JOHNNY Lipscomb II</b>	70531	✔️	✉️	697	11:05 AM	❤️

## Step 2 – Compose the Email to the Buyer Agent

**(NOTE – There is no BULK way to email inside of Matrix)**

✉ Email JOHNNY Lipscomb II about Your Listing: FC285378

Customize your message to JOHNNY Lipscomb II here. A link to your listing will be appended to your message automatically.

39 PINE HURST LN, PALM COAST

From: " [REDACTED] " >

To: "JOHNNY Lipscomb II" <John.Lipscomb@stellarmls.com>

Bcc me a copy of this message.

Language: English ▾

Subject: Reverse Prospecting Enquiry: Listing FC285378

Email Body: Let me know if you have any questions about my listing!

Characters Remaining: 3943

Signature: Lorey

[Edit Your Signature](#)

**NOTE - After Emailing the Buyer Agent, an Envelope Icon Will Appear to Let You Know Who You Have Already Reached Out To**

Agent	Ref #	Pre-approved?	✉ Count
JON PAGAN	39469		22
Brian Nixon	83816		136
JOHNNY Lipscomb II	70531	✓	697

## The Buyer Agent Side of Reverse Prospecting

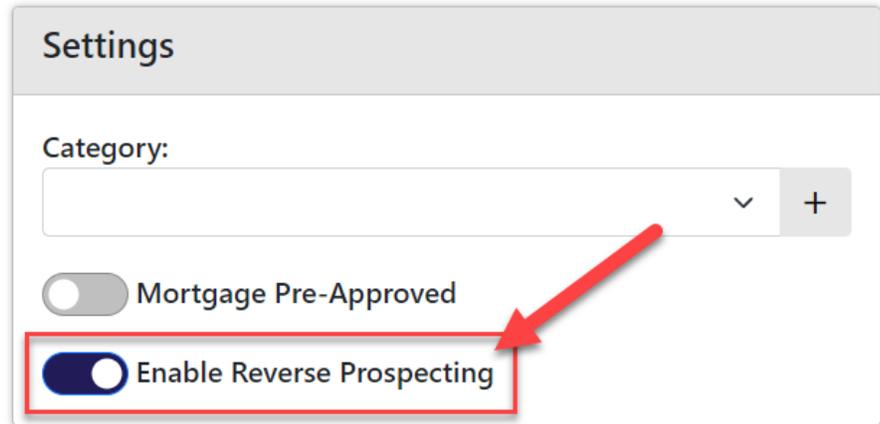
To fully understand the concept of how Reverse Prospecting works – we have to look at both sides of it.

### Buyer Agent Side – Setting Up a Contact to Allow Reverse Prospecting

(Note – This is opted-in automatically for every new contact)

Because Contacts are automatically opted-in for Reverse Prospecting – this will also be opted-in for any Auto Email set up for that contact.

The contact entry screen:



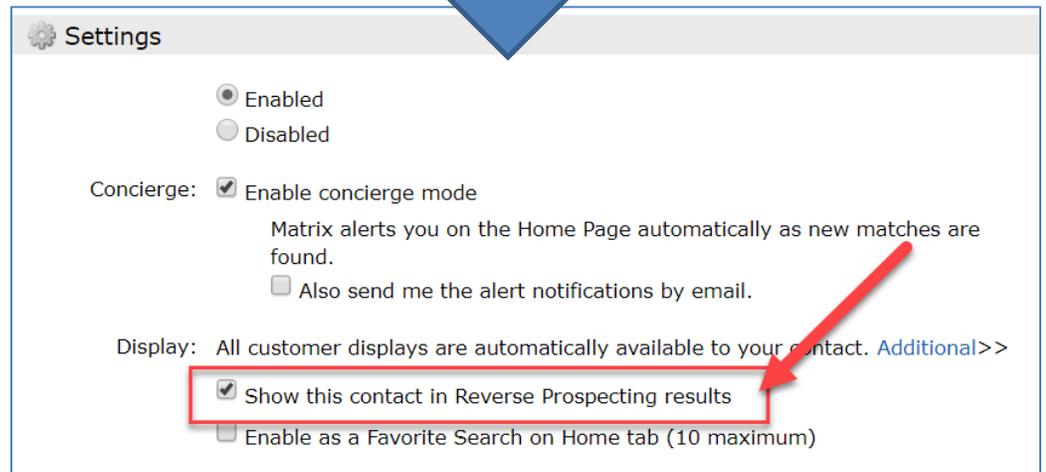
Settings

Category:  ▼ +

Mortgage Pre-Approved

Enable Reverse Prospecting

The Auto Email screen:



Settings

Enabled  
 Disabled

Concierge:  Enable concierge mode  
Matrix alerts you on the Home Page automatically as new matches are found.  
 Also send me the alert notifications by email.

Display: All customer displays are automatically available to your contact. [Additional>>](#)

Show this contact in Reverse Prospecting results

Enable as a Favorite Search on Home tab (10 maximum)

# Buyer Agent/Listing Agent Side – Mortgage Pre-Approved

When you toggle the “Mortgage Pre-Approved to ON” for your buyer contact, this will display as a green checkmark when a listing agent uses Reverse Prospecting on their listing. (Note – this is toggled OFF by default)

*Buyer Agent Side when setting up a contact:*

*Listing agent side when reverse prospecting:*

**Settings**

Category:  ▼ +

Mortgage Pre-Approved

Enable Reverse Prospecting

**Reverse Prospect Results for FC285378**

These agents each have a contact who has received this listing for your listing. They can identify the contact via the Reference Count is the total number of listings each contact has been seen on.

39 PINE HURST LN, PALM COAST

Agent	Ref #	Pre-approved? <input type="checkbox"/>
JON PAGAN	39469	
Brian Nixon	83816	
Priscilla Arzivian	89291	
Antonio Silva	65192	<input checked="" type="checkbox"/>
Charles Ehlert	44393	
Dorothy Kelly	30909	
Antonio Silva	42351	
SILVIA OLIVA	35737	
Antonio Silva	47312	
Antonio Silva	60969	<input checked="" type="checkbox"/>
Antonio Silva	05625	
Willard Nix	53440	
Antonio Silva	26150	
Lidia Smietanowska	62350	
Liliana Escobar	49715	
Robert Linne, PA	27043	<input checked="" type="checkbox"/>
CARA BELLOTTI	81167	

## Buyer Agent Side – Utilizing Reference Numbers for Contacts

Contacts are automatically opted-in for Reverse Prospecting and each contact is assigned a Reference Number. (This will be important later). This number is searchable as well.

The screenshot shows two parts of the CRM interface. On the left is a table with columns: Listing Notes, Favorites, Discards, and Ref#. The Ref# column contains the values 55383, 65366, 38246, and 28071. A red arrow points from the 'Discards' column to the 'Ref#' column. On the right is a 'Contacts' sidebar with a search bar containing '55383'. Below the search bar, a contact is listed with the name '..Dave' and email 'DDSTAMOUR5@GMAIL.COM'.

## Buyer Agent Side – View of the Reverse Prospecting Email

When the Buyer Agent gets the email, they can click on the link to see all the details of the listing and which buyer contact it is for.

The email is from John K. Lipscomb II to 'JS'. It contains the text: 'Let me know if you have any questions! Click the link below to view your contact who is interested in listing FC285378: <https://stellar.mlsmatrix.com/Matrix/ProspectRequested/1282672DQ1R>'. A red arrow points to the link. Below the email content is a large blue arrow pointing downwards.

The listing page shows the following details:

- Address: 39 PINE HURST LN, PALM COAST FL 32164-7023
- MLS#: FC285378
- County: Flagler
- Subdiv: PALM COAST SEC 26
- Prop Type: Residential
- Sub Type: Single Family Residence
- Pool: None
- Status: ACT
- Beds: 3
- Baths: 2/0
- Elem: Middle
- High:
- Sq Ft Heated: 1,723
- SqFt Total:
- \$/SF: \$208.36
- List Price: \$359,000
- Year Built: 2005
- Total Acreage: 0 to less than 1
- Flood Zone: X
- Special Sale: None
- Pets:

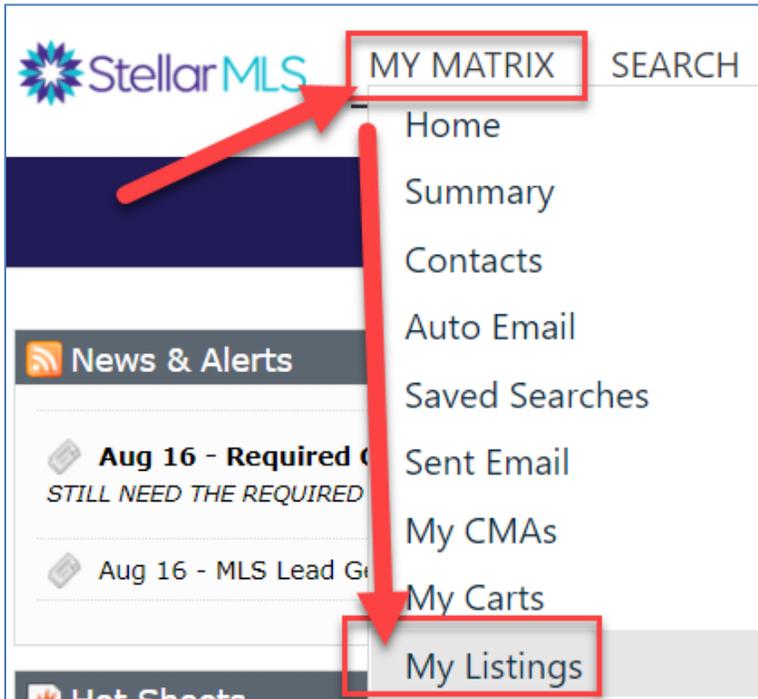
Requested Contact:

Contact	Auto-email	Portal Visited	Sent	Viewed	# Views
Buyer, Billy	Testing Our Reverse Prospecting	11:05 AM	11:05 AM	11:05 AM	1

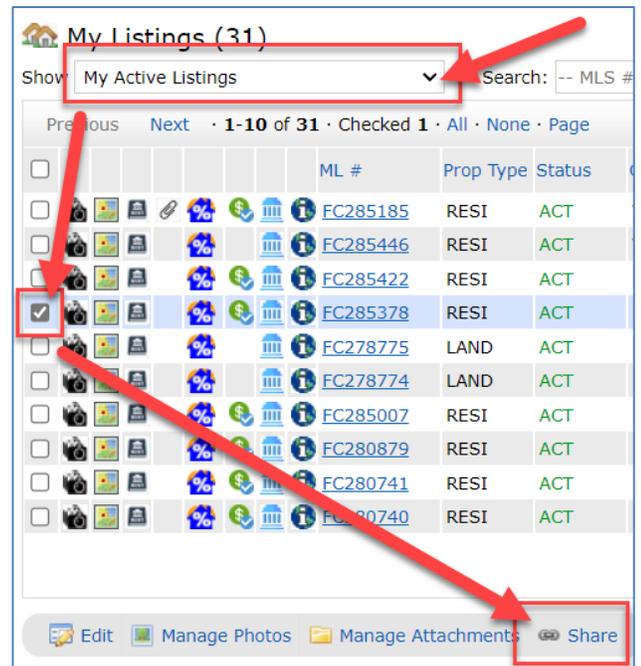
## The Matrix Listing Share Feature

Want to share your own listing? – You can utilize the listing share feature in Matrix to get a branded link. This may allow you to potentially find your own buyer!

### Step 1 – Access My Matrix > My Listings

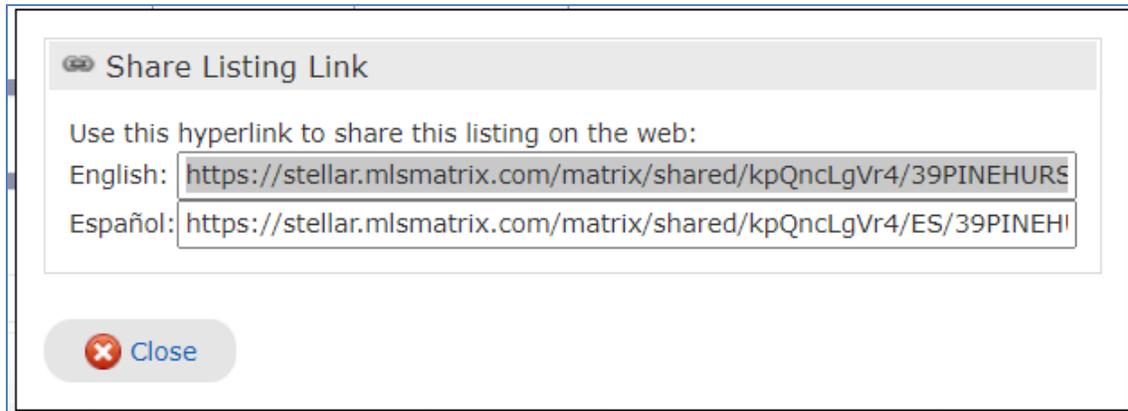


### Step 2 – Show Active Listings, Select the One You Want To Share, and Click the Share Button Below



### Step 3 - Copy the Link and Paste It Wherever You Would Like To Share the Listing!

This link can be shared anywhere – Social Media, Websites, Email Signatures, etc.



*The listing link is available in English or Spanish*

### This is what the link looks like:

(Note – Try copy-pasting the link to preview in a new browser tab)

