

Broker Tools Series Setting Up Office and Agent Branding Notes

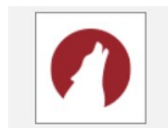
Office Branding

Several MLS tools allow brokers to add their office's branding

- Office Branding for ShowingTime can be configured under the Office Settings section of this tool.
- To add office branding to Transaction Desk, go to the Settings menu, then to Preferences, and select Branding
- If your office uses tools such as Cloud CMA, Homesnap, or Remine, you may be able to add your branding, but will need to contact these vendors directly to do so.



Showingtime



Transaction Desk



Cloud CMA



HomeSnap



Remine

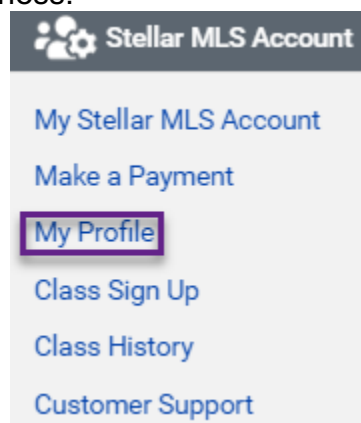
Agent Branding

When you hire a new agent, there are a few places for the agent to personalize. You may want to add these into your onboarding processes. It may also be worth reminding veteran agents about this, as some may not have their branding configured.

- First, they should complete a customer profile to ensure that Stellar MLS sends them the most relevant messages.
- Second, they should add their photo to Matrix.
- Third, they should edit the various branding options under their settings.
- And finally, they should add branding to any additional tool they use, such as Remine, Homesnap, and Cloud CMA.

Agent Profiles

When an agent logs into their dashboard at StellarMLS.com, and goes to the Stellar MLS Account section, they will find a link to their profile. This profile asks questions on the agent's areas of interest and helps Stellar MLS tailor communication on products that will most benefit their business.



Adding Agent Photos to Matrix

When an agent adds a photo to the Add/Edit tan of Matrix, it will show up if another Matrix user runs an Agent Search.

To add a photo to Matrix, go to the Add/Edit Tab.

Under the Roster section, select “Edit Existing” Agent Roster.

The agent will then type in their MLS ID and click “Modify”.

Finally, click “Manage Photos” to Upload a Photo.

This Photo will show up under the Matrix Agent Directory.

My Matrix/My Information

Also in Matrix, agents should go to their settings, accessible by from the arrow next to their name in the top right corner, and then click “My Information”.

Here they can manage their settings for the customer portal, so that when they email listings to a customer and the customer goes to view the listings in the portal, the agent will have customized branding. This is also where agents edit their email signature for emails sent through Matrix.

Working as Chris Lumia ▾

You currently have no concierge notifications.

Admin

Settings



My Information

Manage personal branding and options

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Information | Header & Footer | CMA Cover Sheet | Email Signature | Agent Webpage | Portal Profile

This page allows you to manage the personal information used by Matrix. Modifying the information in this area will display in your Portal, Agent Web Page, CMA's, and the name displayed in the top right corner of Matrix. **It does not update your membership record, association/board or your listing information. It is recommended that you use the default value whenever one is available.**

Adding Agent Branding to Additional Products

Finally, if an agent plans to use tools such as Remine Cloud CMA, or Homesnap, they should add their branding to these products.

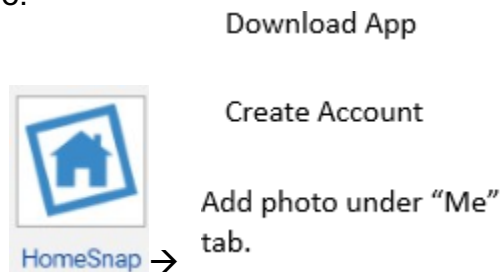
For Remine, the agent can click on their name on the side menu to access their settings. Here they can add their photo and create a URL for the consumer-facing site.



For Cloud CMA, after creating an account, the agent should click on their initials in the top corner. Here, they can access all of their account settings, including their profile, contact info, and Custom Pages.



For Homesnap, agents should download the app and create an account. Under the “Me” tab, they can add a photo. They can also access the link to their branded consumer-facing site here.



Our training team offers a variety of classes and webinars on these different tools, which we strongly encourage your agents to explore.