

Add a Team

1. To add a team (for which you will be the team owner), go to Add/Edit and click on “Teams” on the menu at the top of the screen.



2. You are now in the Roster (<https://roster.northstarmls.com/>) application where Teams are managed. Click on the “+” sign on the right side of the grey Teams banner.

Teams Add a team			
Role	Name	Matrix / Paragon / Etc.	Status
Owner	Acme Realty		Active
Owner	The Etoile Team		Active

Team Name, Activate, Use in Matrix and Description.

3. Type in the name of your Team. This is what will appear on MLS reports when you or your team members are working as the team.
4. Select “Yes” under “Active” if you want to activate the team now. Indicate whether you want to use this Team in the Matrix MLS system.

Note that at this time, only one team per Team Owner may be used in Matrix at one time. If “Yes” is chosen to use team in Matrix, you will also be required to select “Yes” or “No” to allow team members the option of switching between their own names and the team name when printing and emailing team contacts in Matrix. Optionally, you may also enter a description for the team.

Team Name ⓘ Active

The Dream Team Yes No

Use Team In Matrix ⓘ

Yes No

Team Members can switch between their name and the Team Name ⓘ

Yes No

Description

New Team Name

5. **Team Owner.** Click the wrench icon to see Team Owner settings.

Owner

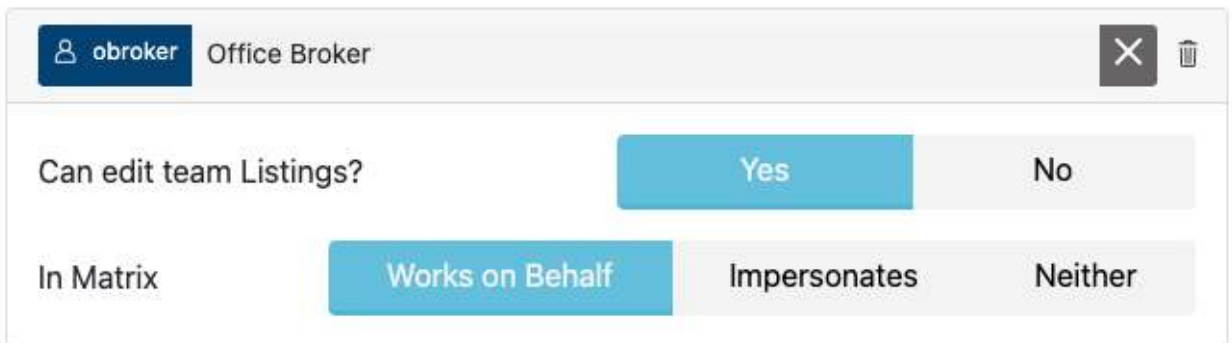


By default, the Team Owner can only Impersonate themselves in Matrix. These settings cannot be adjusted.

6. **Add Team Members:** In the Members section, click the link “Add Team Member.”

Members

No team members.



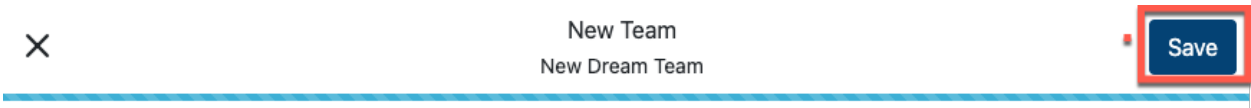
- Start typing the team member’s name or MLS ID and select the person’s name as it appears in the drop-down.
- Select whether the team member may edit team listings in Add/Edit (The team member must have at least Agent-Edit or Agent-Edit-Limited permissions to edit data fields on listings). Agent-Subscriber permissions only allow editing of the map pin and media on listings. Permissions are assigned by your local Association on your membership record with your broker’s approval).
- Select whether they will Impersonate or Work on Behalf of the team (or Neither if they do not use the Matrix MLS system).

Impersonate: Emails you send from Matrix will be sent from your name and email address. They will include your email header and footer (if you have chosen them), and your email signature. If you click the checkbox to allow team members the choice of switching between their own name and the team’s name, then you will also have that option. Any reports you print will have your information in the “Courtesy of” section.

Work on Behalf: Emails you send from Matrix would be sent from “On behalf of (team name),” with your email header/footer and email signature. Any reports you print will have your information in the “Courtesy of” section. With this setting, you do not have the option to allow team members to switch between their own name and the team’s name.

Neither: Select this only if you do not use the Matrix MLS system.

- d. Repeat process for each team member you want to add.
7. **Save Team.** Click the “Save” button in the upper right corner of the screen. We encourage you to click this button throughout the Team set-up process so that you do not lose your work.



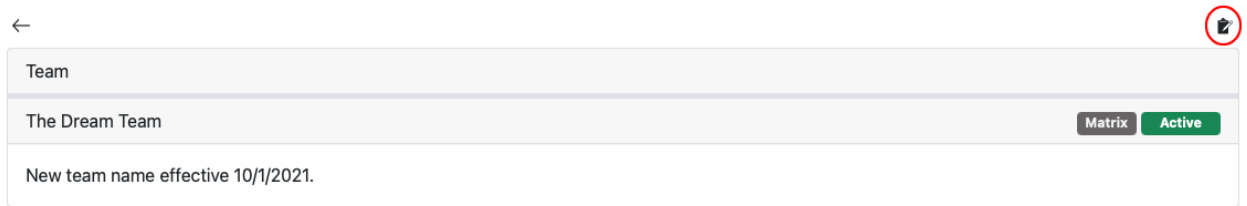
Activate/Inactivate a Team

From your Teams list, ensure the Status Filter is set to allow you to view Active or Inactive Teams, depending on which you want to work with. Or you may view both Active and Inactive Teams by clicking the Funnel icon on the right side of the grey title bar and selecting “Clear Filters” from the Filters drop-down menu.

Teams			
Role	Name	Matrix / Paragon / Etc.	Status
			Active
Owner	The Dream Team	Matrix	Active
Owner	Acme Realty		Active
Owner	The Etoile Team		Active

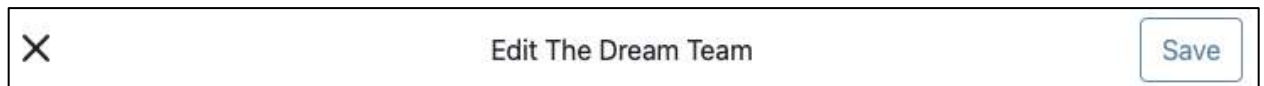
- 1. Click the row of the Team you want to Activate/Deactivate.

2. Click the Clipboard icon to edit the Team.



A screenshot of a web form for editing a team. At the top left is a back arrow. At the top right is a clipboard icon circled in red. The form has three sections: a header section with the label 'Team', a data section with 'The Dream Team' and buttons for 'Matrix' and 'Active', and a description section with the text 'New team name effective 10/1/2021.'

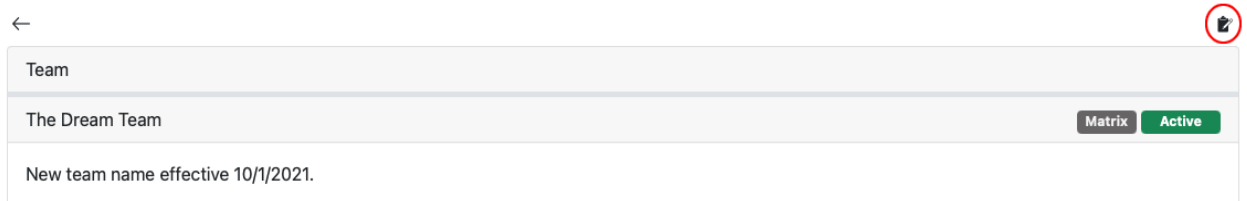
3. Under “Active,” click “Yes” to Activate or “No” to Deactivate.
4. Click the “Save” button at the top right of the screen.



A screenshot of a dialog box titled 'Edit The Dream Team'. It has a close button (X) on the left and a 'Save' button on the right.

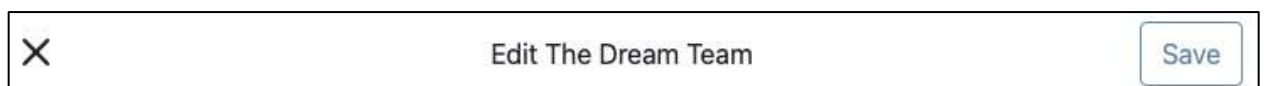
Edit a Team

1. Click the row of the Team you want to Edit.
2. Click the Clipboard icon to edit the Team.



A screenshot of a web form for editing a team. At the top left is a back arrow. At the top right is a clipboard icon circled in red. The form has three sections: a header section with the label 'Team', a data section with 'The Dream Team' and buttons for 'Matrix' and 'Active', and a description section with the text 'New team name effective 10/1/2021.'

3. Make any desired changes in the top section (Team Name, Activate/Inactivate, Use in Matrix and Description).
4. To edit a Team Member, click the Wrench icon next to the member’s name. To delete a member, click the trash can icon next to the member’s name.
5. After completing your edits, click the Save button in the upper right corner.



A screenshot of a dialog box titled 'Edit The Dream Team'. It has a close button (X) on the left and a 'Save' button on the right.

Login As

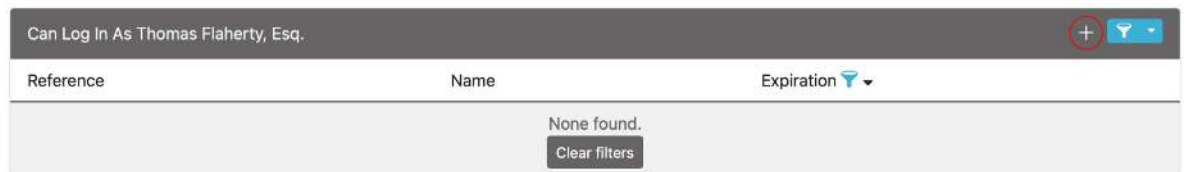
You may authorize other Add/Edit users to log in as you to the Add/Edit system and work on your behalf. This temporary permission lasts 30 days unless you remove it sooner or extend it. This is especially helpful when you plan to be away on vacation.

1. Click on “Teams” on the menu at the top of the Add/Edit screen.

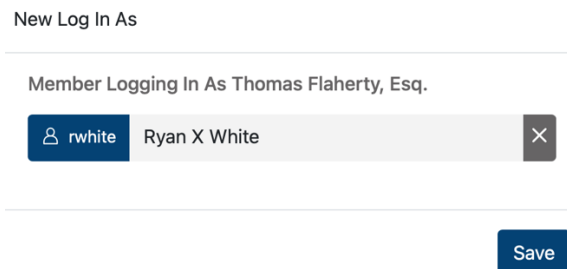


2. Assign Login

- a. Click the plus sign on the right side of the “Can Log In As” grey title bar.



- b. In the pop-up box, start typing the agent’s name or NRDS ID in the box provided. When you see the person you want in the dropdown, make the selection.
- c. Click the blue Save button.



Extend Login

To extend a login as permission beyond the first 30 days, click the “Renew” arrows icon on the person’s row on the summary screen. This will extend the login as the period to 30 days from today’s date.

Can Log In As Thomas Flaherty, Esq.			
Reference	Name	Expiration	
		No range selected	
hveer	Hannah Veer	Nov 13, 2021	
rwhite	Ryan X White	Oct 14, 2021 Expired	

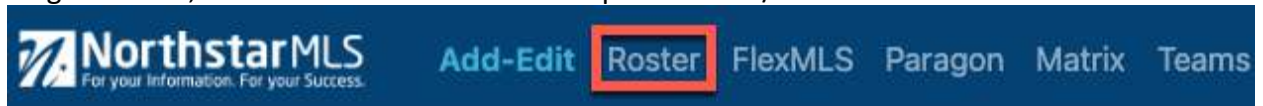
Remove Login

To remove the login as permission you have assigned to a person, click the trash can icon on the person's row on the summary screen. Their Login As permission will then show as Expired.

Office Memberships (formerly known as Office Teams)

If you have Head Broker permissions, then you have the ability (via Office Memberships) to assign those in your firm with Office Broker Permissions to work in Add/Edit for additional offices in your firm (in addition to their primary office).

1. To get started, click the "Roster" link at the top of the Add/Edit screen.



2. In the Search Member box, start typing the name or user ID of the individual you want to make a member of another office.

Welcome to NorthstarMLS Roster

A screenshot of the NorthstarMLS Roster search interface. At the top, there is a search bar with the text 'Obroker' and a close button (X). Below the search bar, a member card is displayed. The card has a blue header with the text 'Member' and 'Office Broker'. Below the header, the email address 'noemail@noemail.com' is shown. On the right side of the card, there is a button with a person icon and the text 'obroker'.

3. Click the plus (+) sign at the top of the third column labeled "Office Memberships."



On the New Office Membership screen, complete these three required fields:

- a. Office: Start typing the Office name or ID number and select it as it appears in the list (Northstarmls Test Realty in the example below).
- b. Member Type: Select from the drop-down (Office Staff in the example below).

- c. Access: This is the permission level within Add/Edit you want them to have within this Office (Office Broker in the example below).

Office

Test1

Northstarmls Test Realty

X

Member

hveer

Hannah Veer

Member Type

Primary Office?

Office Staff

X

Yes

No

Subscriptions

Add/Edit

X

Y

Access

Office Broker

Duration

Lifetime

- d. When complete, be sure to click the Save button at the top right of the screen.

New Office Membership

Save

Need Help?

If you have questions not covered in this guide, you may contact our Help Desk M-F, 8:00 to 5:00 at help@northstarmls.com or 651-251-5456 (1-877-251-5455 toll free).