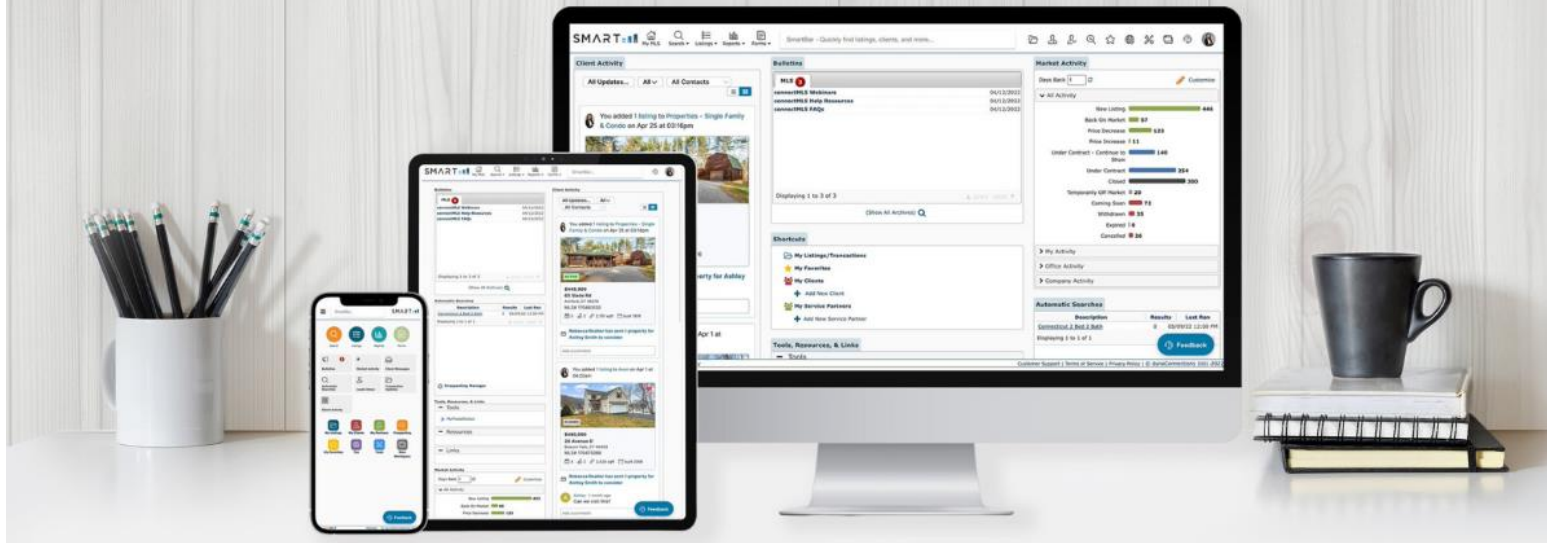


connectMLS™



Broker Slides

Monthly Updates

JUNE 2023



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SmartMLS Updates and Resources

- SmartDesk Access
- Hours of Operation

Matrix is Retiring in July

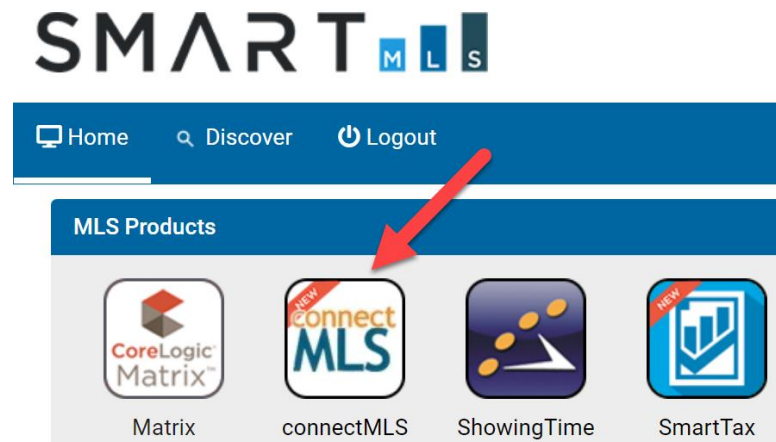
NEW

It's time to begin the transition to connectMLS!

While Matrix will still be available through mid-July, we encourage you to take this time to transition to connectMLS. Your contacts and saved searches are waiting for you and with a few clicks, you can tailor connectMLS to support your personal workflow.

Our goal is to guide this transition with transparency and efficiency while offering training opportunities to make it as easy as possible.

To log-in, click the connectMLS tile on your dashboard. It is important to become familiar with connectMLS before Matrix is removed.



Introduction to connectMLS

NEW

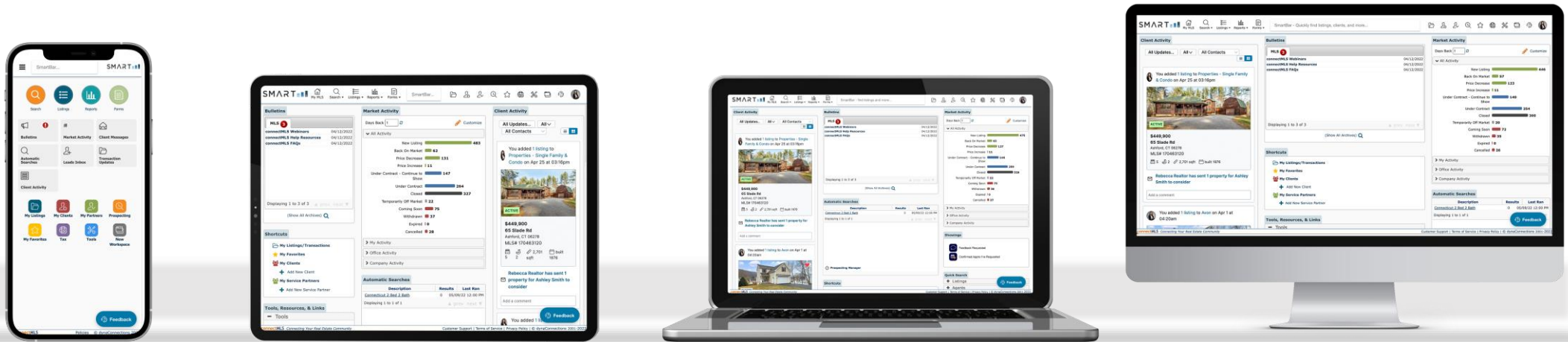


NEW

Welcome to ConnectMLS

As the industry changes, SmartMLS is committed to evolving with it and providing the foundation required to keep you at the forefront. Part of that evolution is delivering a comprehensive MLS solution that supports our entire real estate community - brokers, agents, appraisers, support staff, buyers and sellers.

That solution is connectMLS.



Built upon an innovative and highly flexible mobile-responsive design, connectMLS allows you to tailor the MLS system to support your personal workflow and efficiently service your clients. We look forward to hearing feedback and productively working for you, and with you, towards a streamlined tomorrow with ConnectMLS.

connectMLS Homepage

The connectMLS homepage is made up of many customizable widgets, each providing you with quick access to core MLS functionality. SmartMLS has pre-configured the homepage with what we feel is the best widget layout. However, you can rearrange these widgets via drag and drop to create a layout that best supports your daily workflow.

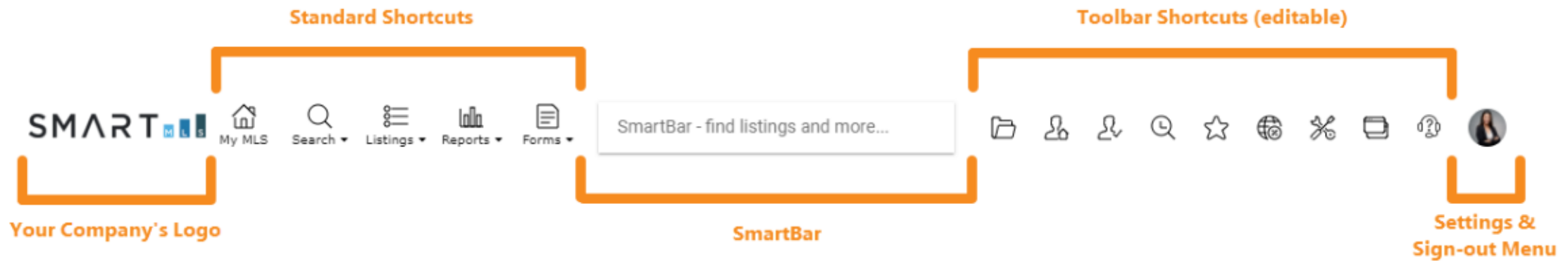
Bulletins Widget -
Displays important communications from your MLS and office, so it can be moved to a different column, but will remain at the top of the screen.

Client Activity Widget -
Can be moved anywhere, but can get lengthy as it shows a feed of all communication between Clients and an Agent.
As such, it's recommended to make sure no other widgets are located beneath it.

The screenshot shows the SMART MLS homepage interface. The top navigation bar includes 'My MLS', 'Search', 'Listings', 'Reports', 'Forms', and 'Admin'. The main content area is divided into three columns. The left column contains the 'Bulletins' widget, which is highlighted with a blue box and a blue arrow pointing to it from the text on the left. The middle column contains the 'Client Activity' widget, also highlighted with a blue box and a blue arrow pointing to it from the text on the left. The right column contains the 'Market Activity' widget, which displays a list of activity types with corresponding counts and progress bars. The footer of the page reads 'connectMLS Connecting Your Real Estate Community'.

Activity Type	Count
Coming Soon	28
New Listing	
Back On Market	
Price Decrease	
Price Increase	42
Under Contract - Continue to Show	33
Under Contract	35
Closed	5
Temporarily Off Market	4
Withdrawn	8
Expired	5
Cancelled	1

The connectMLS Toolbar



Toolbar Notes:

- The Toolbar Menu located at the top of every page in connectMLS allows you to conveniently access a function by selecting the appropriate shortcut icon.
- The shortcuts to the left of the SmartBar are standard (can't be removed) and display drop-down menus with additional options, while those to the right are customizable and can be displayed or hidden based on your personal preferences.

Shortcuts Toolbar - Quick Access to Important Features



My Listings/ Transactions - quickly access your listings and transactions.



My Clients - Open your connectMLS Client List.



My Service Partners - View all service partners you've added to connectMLS.



Prospect Manager - One-stop shopping for all your saved searches and auto-emails.



My Favorites - access all the favorites folders you've created.



Tax - direct link to the SmartTax public records system.



Tools, Resources & Links - convenient links to all of the products and resources SmartMLS provides.



New Workspace - Open up to 3 concurrent instances of connectMLS, each in its own browser tab.



Help/Feedback - Quick access to a plethora of self-help resources.

Compare Matrix and connectMLS

MATRIX

CONNECT

Power Searches	 Using the Speed bar	 Using the SMART BAR
Mapping Tools	 Separate tab for access	 Automatically populates in the same window as search results
Mobile Access	 No app/ user friendly interface available	 Responsive design to any device & SMARTMLS app available
Moveable Widgets	 Movable widgets in select locations	 Movable widgets across entire screen
CMA Reports	 CMA can be done under Search Function	 Separate tab just for CMA reports under "Reports"
Market Watch	 Can be adjusted for a time period and category of property	 Can be adjusted for a time period and category of property
Add/Edit- Listing Input	 Available on the main toolbar.	 This feature will be in connect MLS soon
Client Portal	 Available on the main toolbar.	 Available on the main toolbar and main page widget
Statistics/ Market Reports	 Available on the main toolbar.	 Easily accessible for reports from the main page

Wondering what features are the same, and what's different between Matrix and connectMLS?

Here are some comparable components between Matrix and connectMLS, making your transition that much easier.

This information can also be found in the "All-Access Guide to Success" – Located [HERE](#).

What Copied Over From Matrix?

To assist with the transition from Matrix to connectMLS, here is a helpful tool to guide your transition and understanding of items that were copied into connectMLS, and the items that you should set up in connectMLS.

What Copied over from Matrix	What Does Not Copy from Matrix
Contacts	Listing Carts
Saved Searches	CMAs
Auto-Emails	Widget Customization
Speedbar Shortcuts	Default Searches
	Custom Displays
	Custom Exports

Going forward, we strongly recommend adding any new contacts, saved searches, and auto-emails into connectMLS only. [CLICK HERE](#) for more information on how to transition from Matrix to connectMLS seamlessly.

Branding my connectMLS

Whenever you share something from connectMLS (ex. emailing a Client a listing) you can choose to include your professional branding. Your branding can include things like a photo, your contact information, a resume/bio, and any links to personal websites or social media sites that you would like to share. As such, this is a great place to start when setting up your account.

Making connectMLS your own is now easier than ever. In this section, we review a checklist to successfully setting up your business card and personal settings, thus optimizing how your business flows from day to day.

Manage & Modify General Information:

- Set up your business card.
- Upload a photo.
- Establish your Display Settings.
- Modify Home Page Layout.
- Set up your Defaults – Email templates, Prospecting defaults, and client portal defaults.

Create & Design General Information:

- Customize your widget layout on the homepage.
- Add your social media links.
- Add career highlights to your bio.
- Team/Brokerage branding.
- Fully customizable reports – CMAs, Listing Presentation materials, and statistical reports.

Terminology in connectMLS

If you have been using Matrix for any amount of time, you have most likely become accustomed to the words/names the system uses on the various menus, search screens and displays.

We have created this list to help you adjust to connectMLS system by providing the Matrix equivalent for terms you will find throughout connectMLS. This information can also be found [HERE](#) in the "All-Access Guide to Success".

MATRIX	CONNECT
Speedbar	SmartBar
News & Alerts (Widget)	Bulletins (Widget)
Market Watch (Widget)	Market Activity (Widget)
Listing Carts	My Favorites
Search Criteria	Filter
Single Line Display	List View
Contact	Client
Agent/ Client Full Display	Detail Report / Full Detail

MATRIX	CONNECT
Public Remarks Field	Overview Field
Ranking Report	Market Share Report
Combined Saved Searches / Auto Email (Widget)	Automatic Searches (Widget)
Refine > Narrow (In search Results)	Show > Selected (In Search Results)
Refine > Discard (In Search Results)	Show > Unselected (In Search Results)
Concierge	Screeener

connectMLS & The Client

The Client Portal is a professionally branded, secure site that you and your client can use throughout your partnership for easy, seamless communication and collaboration. When you add a customer as a client in connectMLS, the system automatically creates them their own personal web page, called a Portal.

The Client Portal Includes the Following:

- Professionally branded material readily available.
- One-stop shop for all interactions - CMAs, reports, listings, documents, etc.
- Client flexibility to search for anything and have direct access to disclosures.
- Ability to like, favorite, dislike, and comment on properties – and the agent is instantly notified.
- Full accessibility from a mobile device.

The screenshot displays the SMART MLS Client Portal interface. At the top, the navigation bar includes the SMART MLS logo, a home icon for 'Dashboard', a folder icon for 'My Searches', a heart icon for 'Favorites & Comments', and a magnifying glass for 'Search Listings'. A user profile for 'Jessica' is shown in the top right corner. The main content area is divided into several sections. On the left, there are 'Listings from My Agent' (2 New), 'Favorites & Comments' (1), and 'Messages' (0). Below this is a 'Recommended Services' section with a question mark icon and a note that Jessica has not yet recommended any service partners. The central area features two property listings. The first listing is for '108 Coventry Ln' in Trumbull, CT, priced at \$965,000. It includes a photo of a blue house, an 'ACTIVE' status badge, and details: 4 bedrooms, 3 bathrooms, 3,544 sqft, built in 1989. A notification below the listing states 'Jessica Rubin has sent 1 property for Suzie Seller to consider'. The second listing is for '12 Sunset Ave' in Trumbull, CT, priced at \$569,999. It includes a photo of a white house, an 'ACTIVE' status badge, and details: 4 bedrooms, 3 bathrooms, 1,863 sqft, built in 1941. A similar notification is present. To the right of the listings is a 'Your Agent' section for Jessica Rubin, showing her contact information (Cell: (203) 751-7817, Lic. #: RES.0808996) and buttons for 'Message' and 'Refer a Friend'. Below this is a 'Useful Links' section with a 'Mortgage Calculator' link. The footer of the page includes the connectMLS logo and tagline 'Connecting Your Real Estate Community', along with a 'Top' button.

Client Portal Home Page Example

connectMLS Mobile Application

connectMLS is available on any device with internet access, including mobile and tablet devices. All features are accessible from any internet browser and will retain their full functionality.

Mobile Application Highlights Include:

- When moving to a tablet setting, it will move to a two-column set-up instead of three. You are not losing any functionality.
- When moving to a phone or app setting, the widgets will display as buttons that you can tap with your finger.
- The mobile application can be accessible through a web browser or on the app.
- The client webpage is also mobile friendly and can be accessed from any device.



Experience the
connectMLS™
difference.



Download the app by scanning the QR code

connectMLS Training & Help

Here are recorded sessions, available via Zoom in the training section on SmartMLS Homepage:

Topic	Link
Getting Started w/connectMLS	CLICK HERE
Auto-Email & Client Portal	CLICK HERE
Anytime, Anywhere w/connectLS Mobile	CLICK HERE
Searching in connectMLS	CLICK HERE

Here is a list of helpful guides containing a more in-depth look at connectMLS:

[All-Access Guide to Success](#)

[ConnectMLS FAQs and Getting Started Guide](#)

We value your input and would love to hear your feedback.
As always, we're here to help you every step of the way.


We can't wait for you to experience connectMLS!

Scan the QR code for additional SmartDesk information on connectMLS.



Need Help with Something Else?



- Access our 24/7 SmartDesk [HERE](#) for answers to common questions. You can also utilize our chat feature by clicking this icon  located on the bottom right corner of the SmartDesk screen.
- Contact SmartMLS with assistance on Compliance, Technical Support, or Membership Questions:
 - **203-750-6000**
 - **Support@Smartmls.com**
- Hours of Operation:
 - Monday - Thursday 8:30am-7:00pm
 - Friday – 8:30am – 6:00pm
 - Weekends – 9:00am – 3:00pm

