

MLS-Touch Update to Matrix X

Since we are only a month away from the cutover to the latest version of Matrix X, MLS-Touch will complete an update on Wednesday, Dec. 9, 2020, to integrate into this new system. Once the update is made, it will begin to pull all your personal information – contact, saved searches, carts, etc. directly from Matrix X. This is a great time to confirm all your saved searches and auto-emails in the new system and begin using it as your primary source of data for your clients to fully integrate with MLS-Touch. All changes in Matrix X will be reflected in the app after Wednesday.

What does this mean for Agents?

1. **New Login** – A Matrix/Dashboard style login will be presented to authenticate into the MLS Touch App. All current MLS-Touch app users will be forced to login again after the app updates. This is to ensure the new secure login is in place and you choose Heartland MLS from the Kansas/Missouri state selection.
2. **Contacts are migrated for Agents.** All Agents will retain their contacts.
3. **Brand and Share will not migrate.** Agents will need to customize their Brand and Share settings (color scheme, logo). *Recommended to do this before inviting clients.*
4. **Generic "Share my App" lead generation link will not migrate.** Agents will need to update the generic link in any promotional materials.
5. **Matrix X syncing.** Once the Agent begins using the migrated App, information will begin syncing to Matrix X. No information will go to the former version of Matrix. It is a great way to kickstart using the new Matrix X and getting information working seamlessly between mobile and desktop.
6. **Saved Searches and Portal information will not migrate.** All new saved searches and portal activity will begin to migrate to Matrix X as soon as the Agents start to use the new App. Due to changes in the data structure and Matrix X migration limitations these items will not migrate to the new App.

What does this mean for clients?

1. **Client App needs updating.** The client Apps will become non-functional at the time of the migration.
2. **Invite your clients to the new App.** Agents will need to reinvite their clients to the App, using one of two methods:
 - a. From the Contact they can share the unique link directly to their client. The bonus of this method is that the Prospects App will automatically recognize the client and there will be no steps to re-enter their information for the App. This will take a little longer as the Agent needs to do each client; however, it might be a great time to clean up their contact lists and really invite those clients that are

actively searching for properties and/or the Agent wants a long-term relationship.

- b. From the Brand & Share generic link. If they utilize this method, the client will be put through the initial steps of registering like the first time they were invited to the App. The bonus to this is the Agent can take that link and put it in an email or do other mass communications for speed.
3. **Sync functions with Matrix X.** Once the Client activates their account, all portal activity (favorites, etc) will begin to sync to Matrix X.