The Portal 7.0

Set-Up Guide

Confidential to CoreLogic®

Portal Set-Up

Configure Settings

1. From the Matrix top menu, hover over the, "**My Matrix**" option then click, "**Settings**".

2. Click the, "**My Information**" link to review your contact information.

Information

1. The, "Information" section contains **personal contact information** that you can share, with Customers and Prospects, from elsewhere in the system.

2. Add, update then review your information to ensure that it's correct.

   Note: information in this section has been pulled from the Roster. Though some fields are locked and may not be modified, textboxes with a checkmark indicate that you may edit the associated field. If, however, any of the information on this page is incorrect, please contact your Board or Association to have it updated at the source.

3. Click the, "**Save**" button to save any changes.

Header & Footer

1. Click the, "Header & Footer" tab in the, "My Information" section of, Matrix "Settings".

2. Choose an **Agent banner** to brand the information shared with your Customers and Prospects.

   Note: branding will appear on the Client Portal, the Agent Web Page as well as printed Reports and Displays.

   Note: select the, "I choose not to use a header/footer at this time" option to disable the templates and only brand using your default contact information.

   Alternatively, you can select the, "Basic Template" option to display specific contact information as well as set a unique color theme (see, "Customize Header" in the, "Portal Set-Up" section of this Guide).

3. Click the, "**Preview**" button.
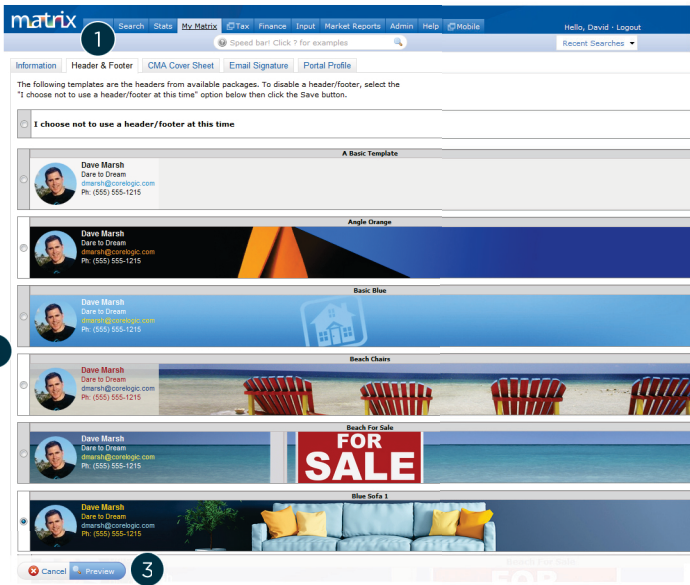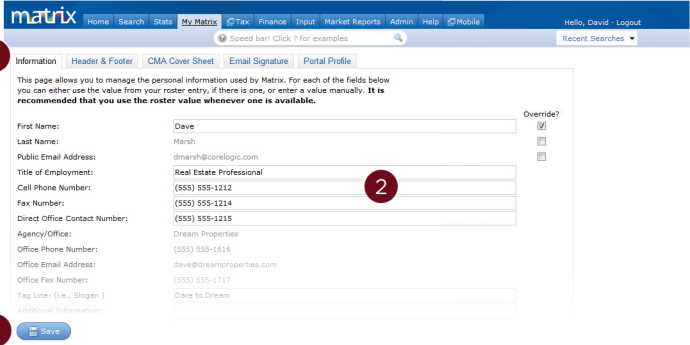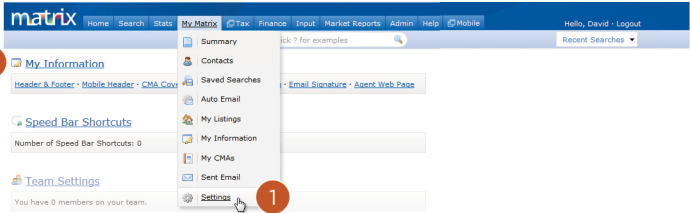
Customize Header

1 From the, "**Header & Footer**" section, review your banner's Header image.

  1a Click the, "**Select a different banner image/theme**" link to return to the banner section and choose a new theme.

  1b Click the, "**Upload a custom banner image**" link to replace the default banner image with a custom image from your computer's hard drive.

  Note: suggested image dimensions are 1600 (width) x 120 pixels (height). Smaller images will scale-to-fit in height.

2 Choose an **Agent Photo**.

  Note: select the, "No Photo" option to hide your Agent Photo.

  Note: to include an Agent Photo, select the, "Use Custom Photo" option then click the, "Change photo" link to update your default image.

3 Select the information fields to **brand** your Agent Header.

  Note: branding fields are pulled from the, "Information" tab (see, "Information" in the, "Portal Set-Up" section of this Guide).

4 Choose a **color theme**.

  4a Customize your header color theme by either typing a specific hexadecimal number directly into the textbox or by clicking the color bar and choosing one from the chart.

  4b Click the, "Transparency Level" dropdown list to choose your branding transparency.

  Note: transparency options will determine how much of the banner's background image is visible through the branding (Agent information) area.

Customize Print Footer

1 From the, "Header & Footer" section, select the, "Yes, I want a **Print Footer**" option.

  Note: select the, "No Print Footer for me" option if you prefer printed material not include a footer.

2 Select the information fields to **brand** your Agent Footer.

  Note: branding fields are pulled from the, "Information" tab (see, "Information" in the, "Portal Set-Up" section of this Guide).

3 Choose a **color theme**.

  3a Customize your footer color theme by either typing a specific hexadecimal number directly into the textbox or by clicking the color bar and choosing one from the chart.

Save Header & Footer Configuration

1 Click the, "**Save**" button to update any changes.

  Note: click the, "Reset Branding to defaults" to restore your defaults.

Portal Profile

**1** Click any closed `panel bar` to show the contents of that panel.

Note: click the open panel bar to, once again, hide the content.

2 Check any panel to **make its content visible** in the, "My Agent" section of the Client Portal.

Note: un-check this panel to hide its contents from the, "My Agent" section of the Client Portal.

3 Click the, "**Photo**" panel to add a photo.

3a Click the, "Change photo" link to update your photo.

4 Click the, "**About Me**" panel to add a bio or, perhaps, a short message to share with your customers.

5 Click the, "**Inventory Slideshow & Links**" panel to choose whether to share selected listings with your customers.

Note: listings will appear in the, "My Agent" section of the Client Portal as an automated slideshow with a button to view all.

6 Click the, "**Video**" panel to embed a video to share with your customers.

6a From YouTube, click the, "Share" option then copy/paste the video URL into Matrix's, "YouTube URL" textbox.

7 Click the, "**Contact Information**" panel to enter contact information to share with your customers.

Note: contact fields are pulled from the, "Information" tab (see, "Information" in the, "Portal Set-Up" section of this Guide).

8 Click the, "**Save**" button.

1 **Open** a Client Portal to review your changes.

Note: My Matrix > Contacts > [expand a contact] > Open Portal.
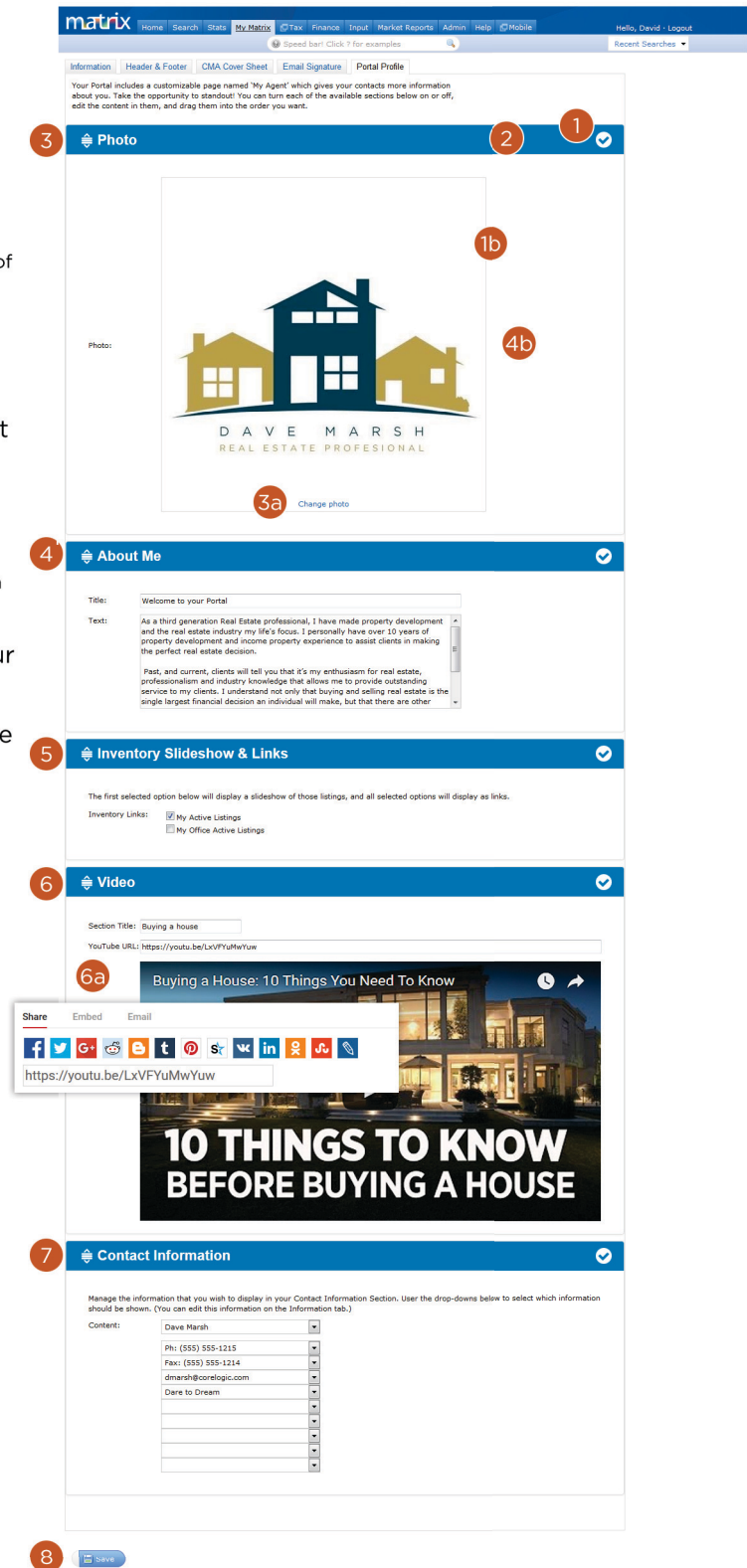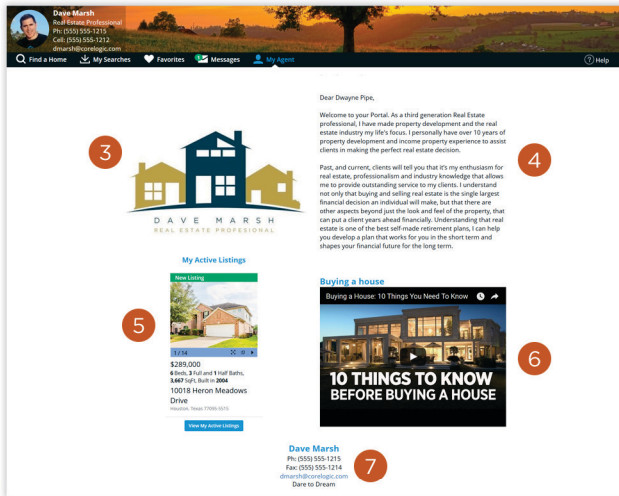
Portal Notification Settings

1. From the Matrix top menu, hover over the, "**My Matrix**" option then click, "**Settings**".

2. Click the, "**Portal Notification Settings**" link to set how, and when, you would like to receive Client Portal notifications.

Configure Notification Settings

1. **When a contact does this**: the action take by the Client in their Portal

   Options: Visits Portal, Saves a favorite, Adds Notes, Saves a Search, Visits Portal First Time.

2. **Notify me ASAP via Email**: select a checkbox if you would like to be notified - via email - of the associated Client action.

3. **Notify me ASAP via Text**: select a checkbox if you would like to be notified - via text message - of the associated Client action.

   3a Click the, "**Click here to edit your cellular information**" link to add/edit your phone number and to select your cellular provider.

   3b Once your phone details have been entered, click the, "**Send me a verification code**" button.

   Note: some mobile carriers may send you an initial text requiring you to first confirm that you would like to accept, "Email to SMS" messages.

   3c Check your mobile device then, back in Matrix, enter the **verification code** that was received.

   Note: be sure to read the entire text message to ensure you have entered the correct verification code.
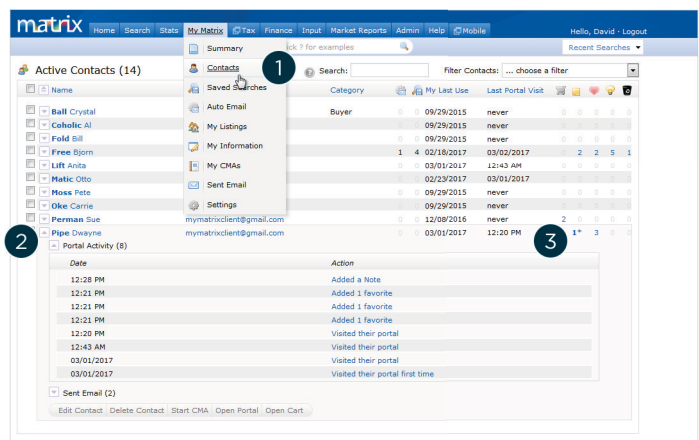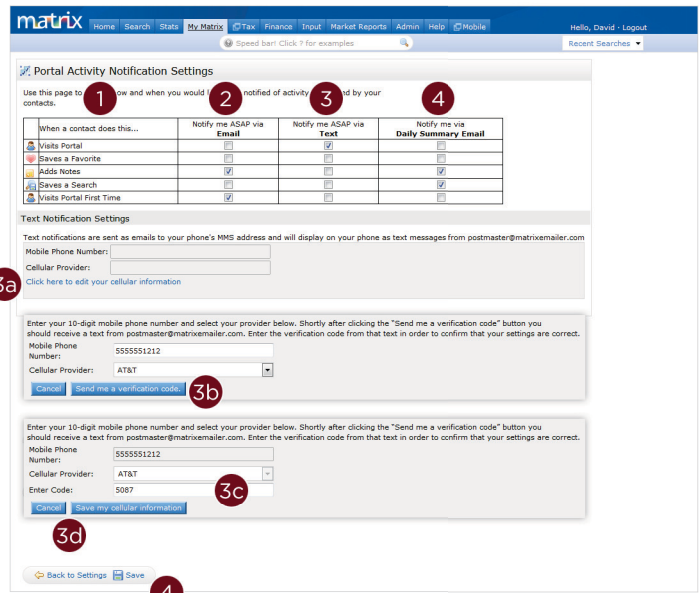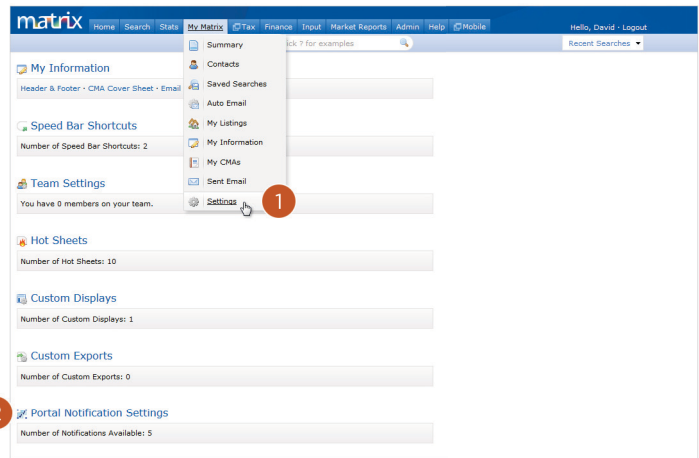
   3d Click the, "**Save my cellular information**" button.

4. Click the, "**Save**" button to save your Portal Notification settings.

View Client Activity

1. From the Matrix top menu, hover over the, "**My Matrix**" option then click, "**Contacts**".

2. Expand a Contact to **view**.

3. Click the associated number link.

   Note: an asterisk (*) beside the number of Notes indicates unread Note(s).

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