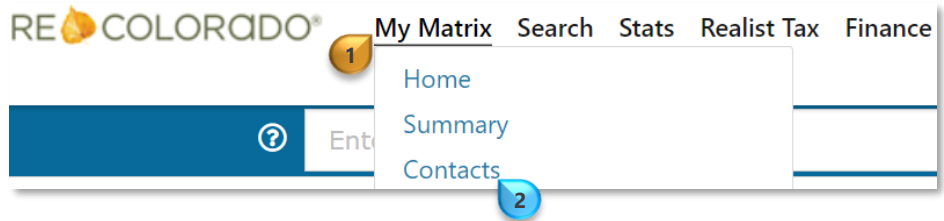


Matrix users have four options for adding a *New Contact*

Option One:

Hover over **My Matrix** 

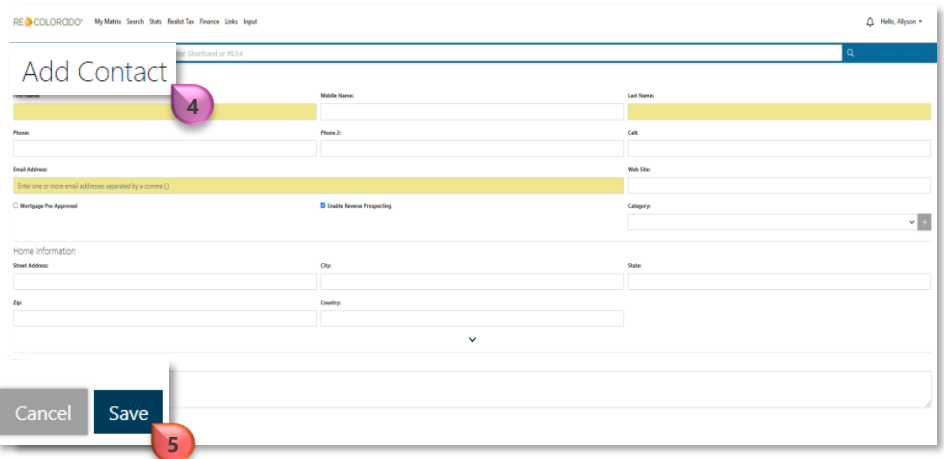
Select **"Contacts"** 



Click **"Add"** 



Complete the **Add Contact** form 



Click **"Save"** 

Note: Required fields are highlighted in yellow

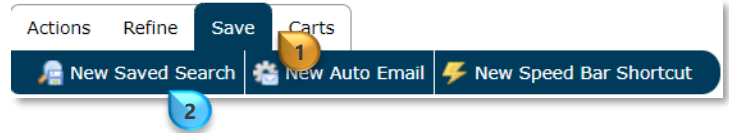
Note: Two names can be entered in the **"First Name"** field. For example, *Patricia and John*

Note: Up to five email addresses can be entered in the **"Email Address"** field. Separate each email address with a comma and a space. For example, **pat.jack@test.com, john.snow@test.com**

Option Two

A New *Contact* can be added to *Matrix* when **Saving a Search**

Click "**Save**" on the *Floating Tool Bar* 



Click "**New Saved Search**" 

Click "**Create a New Contact**" 

Complete the **Personal Information** form 

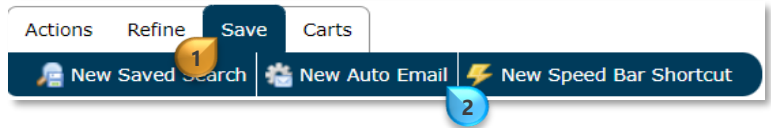
Click "**Save**" 

Note: To learn how to create a *Saved Search* please see **How to Save Searches**

Option Three

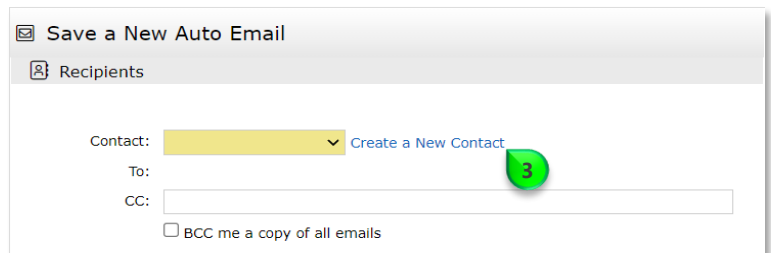
A New *Contact* can be added to *Matrix* when creating a *New Auto Email*

Click "**Save**" on the Floating Toolbar 

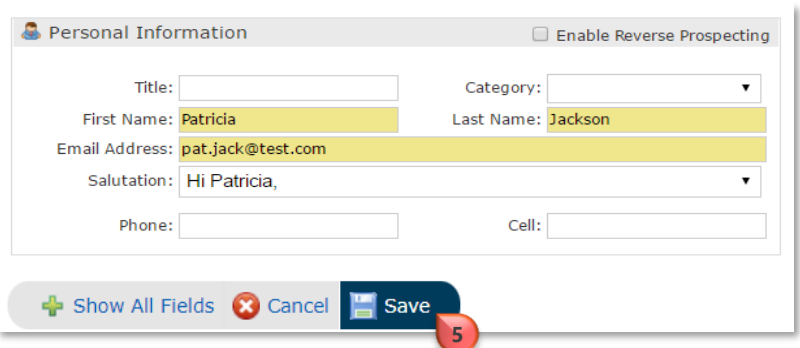


Click "**New Auto Email**" 

Click "**Create a New Contact**" 



Complete the **Personal Information** form 



Click "**Save**" 

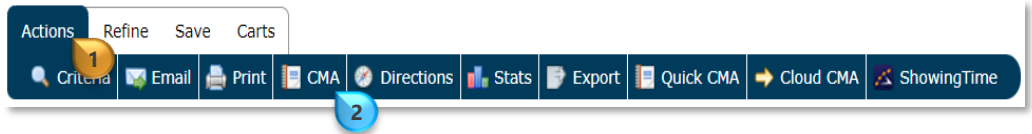
Note: To learn how to create an *Auto Email* please see **How to Create an Auto Email**

Option Four

A New *Contact* can be added to *Matrix* when creating a *CMA*

Click "**Actions**" on the *Floating Tool Bar* **1**

Click "**CMA**" **2**



On the **Start Tab** **3** click "**Create a New Contact**" **4**

 A screenshot of the 'Select CMA Contact' form. The navigation bar at the top includes 'Start', 'Pages', 'Subject', 'Cover', 'Comparables', 'Map', 'Adjustments', 'Pricing', and 'Finish'. A green callout bubble with the number '3' points to the 'Start' tab. The form contains a 'Select Contact Name:' dropdown menu with a 'Create a New Contact' link to its right. A purple callout bubble with the number '4' points to this link. Below the dropdown is a 'Description:' text area. A yellow 'Please Note' box at the bottom states: 'This CMA will be saved for 365 days from the Last Modified date and then automatically be deleted. If you need to keep it longer, modify the CMA before the end of the 365 day period or save a copy of the generated PDF to your computer (you should do that anyway).'

Complete the **Personal Information** form **5**

 A screenshot of the 'Personal Information' form. It includes fields for Title, Category, First Name (Patricia), Last Name (Jackson), Email Address (pat.jack@test.com), Salutation (Hi Patricia), Phone, and Cell. A checkbox for 'Enable Reverse Prospecting' is present. A red callout bubble with the number '5' points to the 'Salutation' dropdown. At the bottom, there are three buttons: '+ Show All Fields', 'Cancel', and 'Save'. A grey callout bubble with the number '6' points to the 'Save' button.

Click "**Save**" **6**

Note: To learn how to create a *CMA* please see **How to Create a CMA from Search Results**