







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

Option One:


Hover over **My Matrix**  RE COLORADO® Home Search Stats **My Matrix**  Realist Tax Finance

Select **"Contacts"**  

Click **"Add"** 


 Add  


Complete the **Personal Information** form 

 Personal Information Enable Reverse Prospecting




Title: Category:

First Name: **Patricia** Last Name: **Jackson**

Email Address: **pat.jack@test.com** 

Salutation: Hi Patricia, 

Phone: Cell:

 Show All Fields   Save

Click **"Save"** 

Note: Required fields are highlighted in yellow

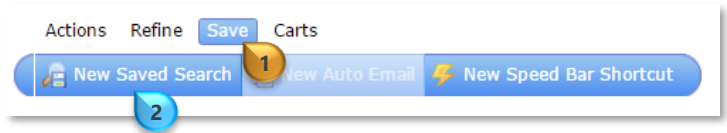
Note: Two names can be entered in the **"First Name"** field. For example, *Patricia and John*

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

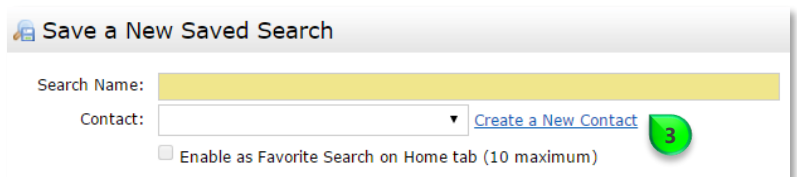
A new *Contact* can be added to *Matrix* when **Saving a Search**

Click **“Save”** on the *Floating Tool Bar* 

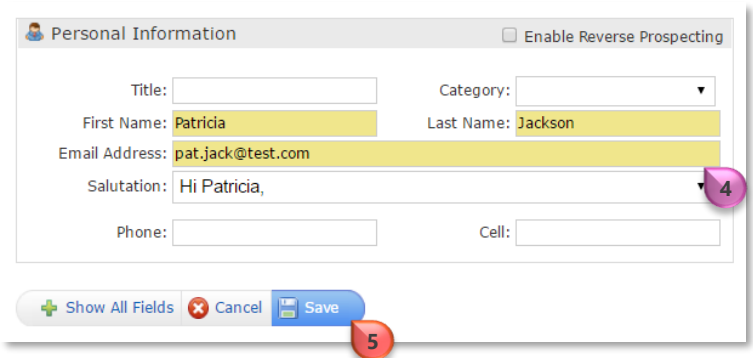


Click **“New Saved Search”** 

Click **“Create a New Contact”** 

A screenshot of a dialog box titled 'Save a New Saved Search'. It has a white background and rounded corners. The 'Search Name' field is highlighted in yellow. Below it is a 'Contact' dropdown menu with a blue link 'Create a New Contact' to its right. A blue callout bubble with the number '3' points to this link. At the bottom, there is a checkbox labeled 'Enable as Favorite Search on Home tab (10 maximum)'.

Complete the **“Personal Information”** form 

A screenshot of a 'Personal Information' form. The form has a white background and rounded corners. It contains several fields: 'Title', 'Category', 'First Name' (filled with 'Patricia'), 'Last Name' (filled with 'Jackson'), 'Email Address' (filled with 'pat.jack@test.com'), 'Salutation' (filled with 'Hi Patricia,'), 'Phone', and 'Cell'. A blue callout bubble with the number '4' points to the 'Salutation' dropdown. At the bottom, there are three buttons: 'Show All Fields', 'Cancel', and 'Save'. A blue callout bubble with the number '5' points to the 'Save' button.

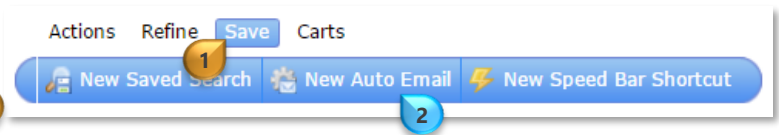
Click **“Save”** 

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

Option Three

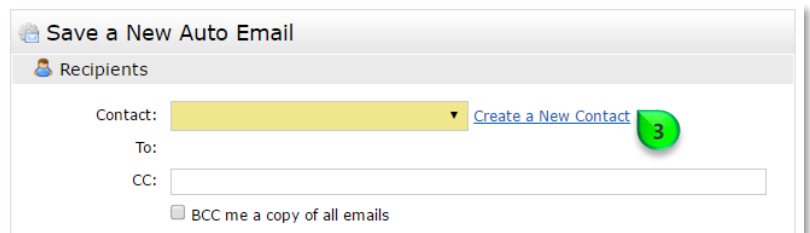
A new *Contact* can be added to *Matrix* when creating a *New Auto Email*

Click **“Save”** on the Floating Toolbar 

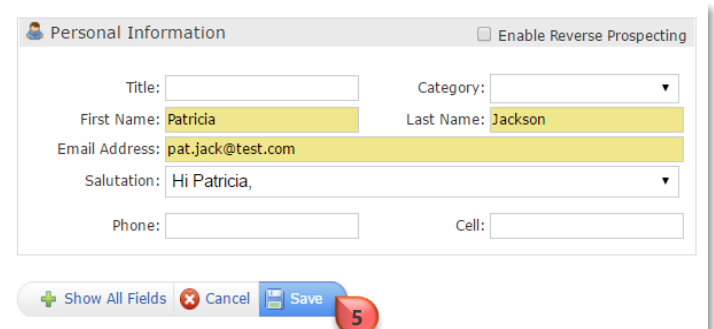


Click **“New Auto Email”** 

Click **“Create a New Contact”** 

A screenshot of the 'Save a New Auto Email' dialog box. It has a 'Recipients' section with a 'Contact:' dropdown menu. A yellow callout '3' points to a blue link 'Create a New Contact' next to the dropdown. Below are 'To:' and 'CC:' text boxes, and a checkbox for 'BCC me a copy of all emails'.

Complete the **“Personal Information”** form 


A screenshot of the 'Personal Information' form. Fields include 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 at the top right. At the bottom are buttons for 'Show All Fields', 'Cancel', and 'Save'. A red callout '5' points to the 'Save' button.

Click **“Save”** 

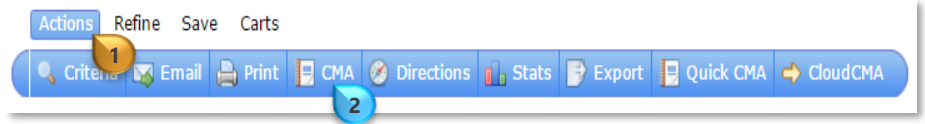
Note: To learn how to create an *Auto Email* please see **How to Create an Auto Email**

Option Four

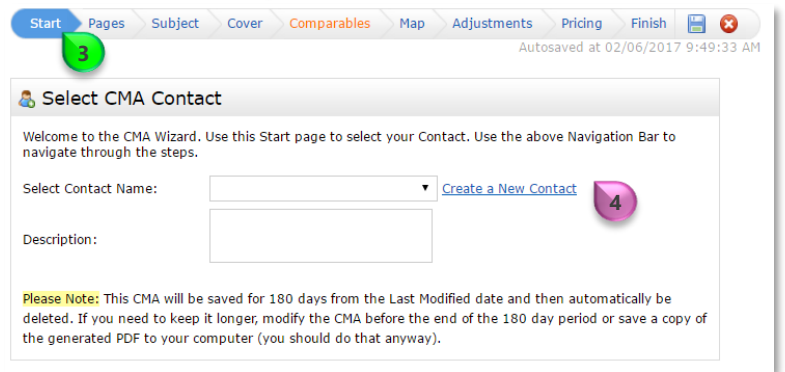
A new *Contact* can be added to *Matrix* when creating a *CMA*

Click **"Actions"** on the *floating toolbar* 

Click **"CMA"** 



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



Start Pages Subject Cover Comparables Map Adjustments Pricing Finish

Autosaved at 02/06/2017 9:49:33 AM

Select CMA Contact

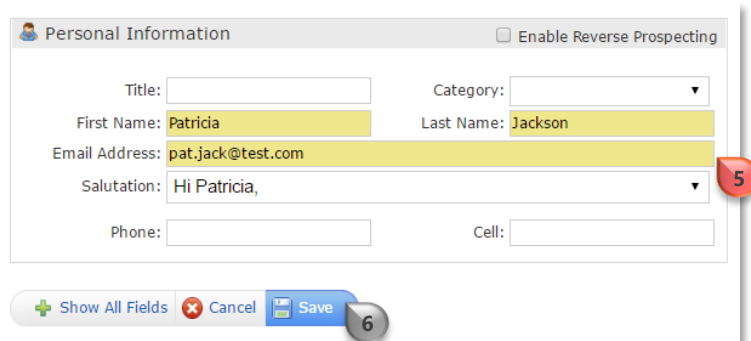
Welcome to the CMA Wizard. Use this Start page to select your Contact. Use the above Navigation Bar to navigate through the steps.

Select Contact Name: [Create a New Contact](#)

Description:

Please Note: This CMA will be saved for 180 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 180 day period or save a copy of the generated PDF to your computer (you should do that anyway).

Complete the **"Personal Information"** form 



Personal Information Enable Reverse Prospecting

Title: Category:

First Name: **Patricia** Last Name: **Jackson**

Email Address: **pat.jack@test.com**

Salutation: **Hi Patricia,**

Phone: Cell:

Click **"Save"** 

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