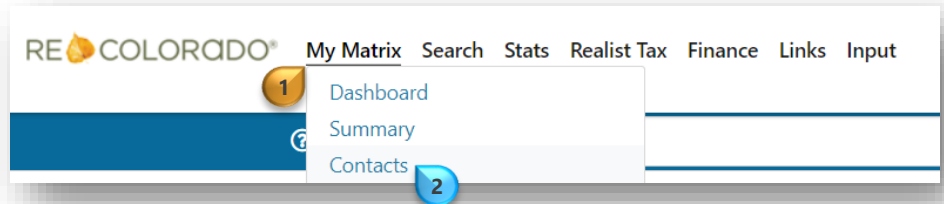


Matrix users have four options for adding a *New Contact*

Option One:

Hover over **My Matrix** 

Select **"Contacts"** 



Click **"Add"** 

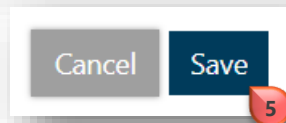


Complete the form 

Add Contact

First Name:	Middle Name:	Last Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone:	Phone 2:	Cell:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email Address:	Web Site:	
<input type="text"/>	<input type="text"/>	
<input type="checkbox"/> Mortgage Pre-Approved	<input checked="" type="checkbox"/> Enable Reverse Prospecting	Category:
		<input type="text"/>

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*

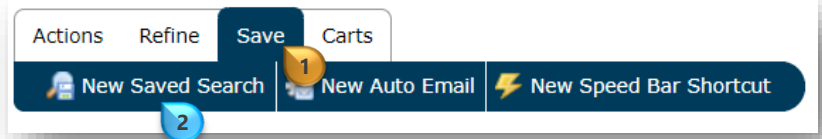
Note: Up to five email addresses can be entered in the **"Email Address"** field. Separate each email address with a comma and a space. For example, **pat.jack@test.com, john.snow@test.com**

Option Two


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

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

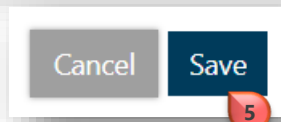
Click **“New Saved Search”** 



Click **“Create a New Contact”** 

Complete the form 

Click **“Save”** 

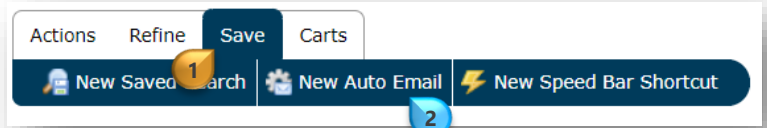


Note: To learn how to create a *Saved Search* please see **How to Save Searches**

Option Three

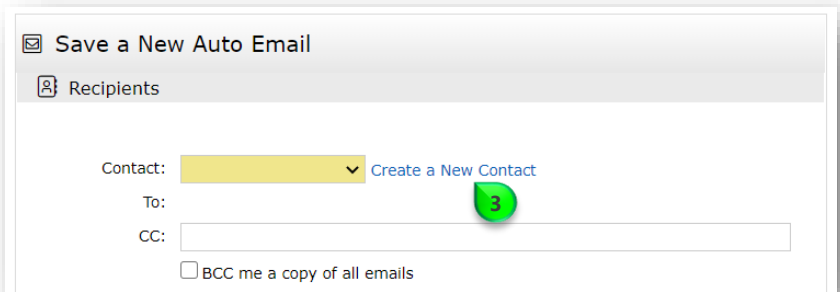
A new *Contact* can be added to *Matrix* when creating a *New Auto Email*

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

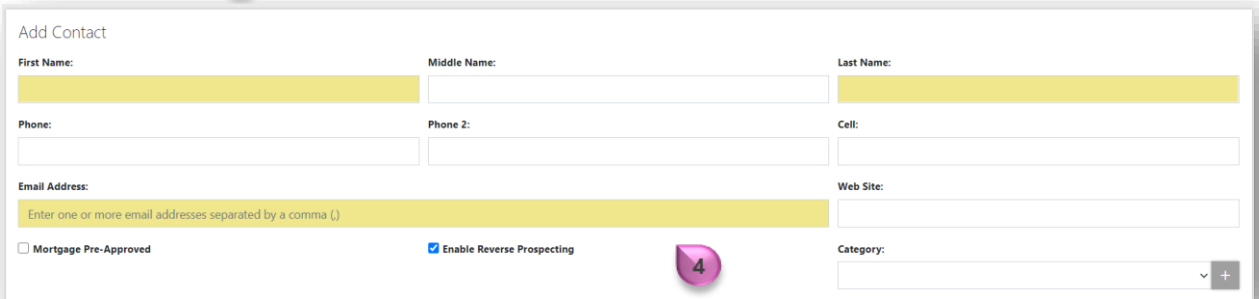


Click **"New Auto Email"** 

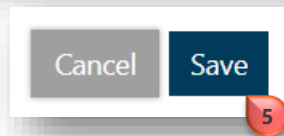
Click **"Create a New Contact"** 



Complete the form 




Click **"Save"** 



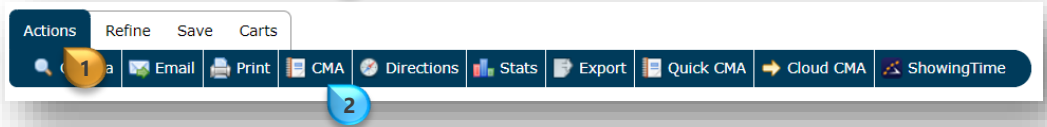
Note: To learn how to create an *Auto Email* please see **How to Create an Auto Email**

Option Four

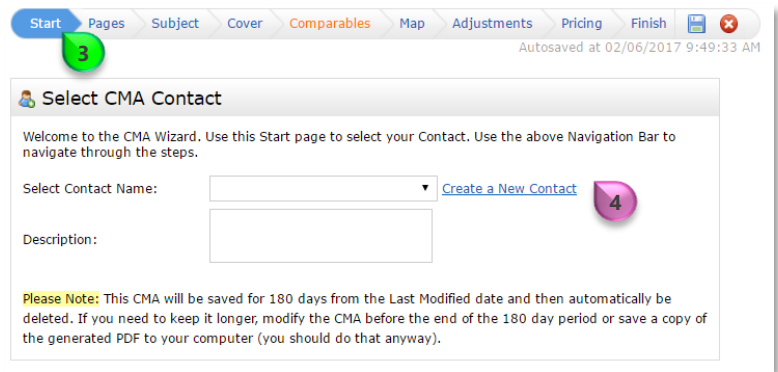
A new *Contact* can be added to *Matrix* when creating a *CMA*

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

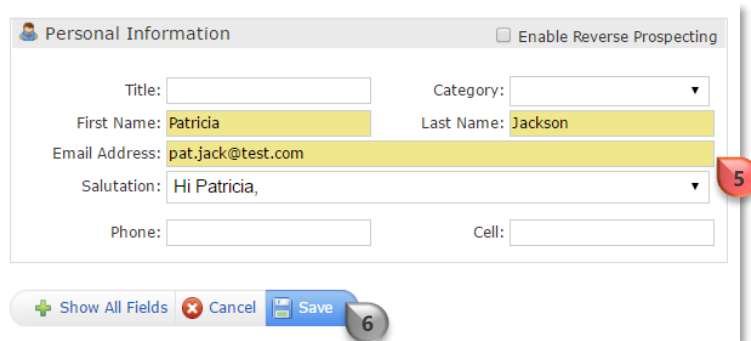
Welcome to the CMA Wizard. Use this Start page to select your Contact. Use the above Navigation Bar to navigate through the steps.

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:

[+ Show All Fields](#) [x Cancel](#) [Save](#)

Click **"Save"** 

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