

Customize CMA Cover Sheet

Hover over the “My Matrix”  tab, select “My Information” 



Click on “CMA Cover Sheet” 

Click the “Override” Check-box  next to the field you want to edit

Note: The change will appear only in your CMA Cover Sheet

Click “Upload Photo” or “Change Photo” 

A screenshot of a web form titled 'CMA Cover Sheet'. The form has several tabs: 'Information', 'Header & Footer', 'CMA Cover Sheet', 'Email Signature', and 'Portal Profile'. The 'CMA Cover Sheet' tab is active. Below the tabs, there is a text block: 'The following fields are used on your CMA Cover Sheet. For each field you can either use the value defined on the Information tab, or override it with a value which is specific to the CMA Cover Sheet.' Below this text is a table of fields. Each field has a text input box and an 'Override?' checkbox. The 'Name' field has a checked checkbox and a callout '4'. The 'Company' field has an unchecked checkbox. The 'Address Line 1', 'City', 'State or Province', 'Postal Code', 'Phone', 'Email', and 'Office Website' fields all have checked checkboxes. To the left of the form, there is a photo of a man's face with a callout '5' and a 'Change photo' link. At the bottom of the form, there is a 'Save' button with a callout '6'.

Click “Save” 