



Section 8: Systems Dotloop | Matrix | Intranet | PropertyBase

Connect & Integrate Applications

GROW YOUR PROPERTYBASE IN AN ORGANIZE MANNER

1. Who –Begin with the people you know and who know you—Mets, or Sphere of Influence. This includes family, friends, neighbors, former coworkers, schoolmates, teammates, etc. This group is your source of new business, repeat business, and referrals.
2. Add Haven't Mets—people who don't know you ... yet! You will connect with them to ask about helping with their real estate needs. This group is a source of new business, and you'll learn more about how to find these later in the course.
3. Add Referrals—Remember, you'll be asking everyone from your Mets group for a name, or several names, of people they know who may be thinking of buying or selling in the near future. Referrals may be hot leads and are golden!



Goals for Contact

1. Ask for their business
2. Ask for referrals
3. Provide value and gather more information to build and nurture the relationship

Keep in mind why you want their information—to build the relationship. You'll want as much data as you can gather for each person.

- Name
- Address
- Email
- Phone numbers
- Social media
- Children
- Pets
- Own/Rent
- Length of time in their current home

In fact, not having all the information is a great reason to make another call and ask.

Feed Your Database

You now understand the significance of feeding your database. Start every day with a “Database Growth Exercise”.

1. Add at least 10 contacts to your PropertyBase CRM Database.
2. Include as much information as you can for each contact. If you don't have all means of contact—for example, the records below have some “holes” of missing data—get it! Remember, this always makes for a great opportunity to reach out and ask for the missing information.

2. Classify / Use TAGS

After speaking with a contact and inquiring about their requirements, the next step is to categorize them in your database (by using TAGS) based on their needs.

Are they a buyer, a seller, or both? Are they a member of a particular group you're targeting—a neighborhood, a religious group, or a sports team? Organizing your database will enable you to better service your customers and find new business.

For Example:

- Classify your contacts using “Types”. For example, types are Buyer, Seller, Buyer/ Seller, Agent, Renter, Investor, Vendor, etc.
- Classify your contacts using Groups or Create groups according to what makes sense for you. Examples could be Business Relationships, School, Sports, Open House Contacts, etc. Groups will also help with targeted marketing. Knowing what group the contact is in will help determine which marketing campaign will best resonate with them.

3. Campaign

It's time to start categorizing and qualifying your contacts in your Database Spreadsheet. It is simple to include them in a targeted marketing campaign.

1. Getting started with contacts

Your database is your business. It is important to build daily habits and to be very purposeful with how you communicate to both leads and contacts.

Leads are people you have minimal contact information for.

Communication is one-way, offer-based, and focused on identifying their motivation. Contacts are people you have implied or explicit permission to have an ongoing connection with. It's focused on getting a response and beginning a relationship. PropertyBase CRM enables you to organize and keep track of

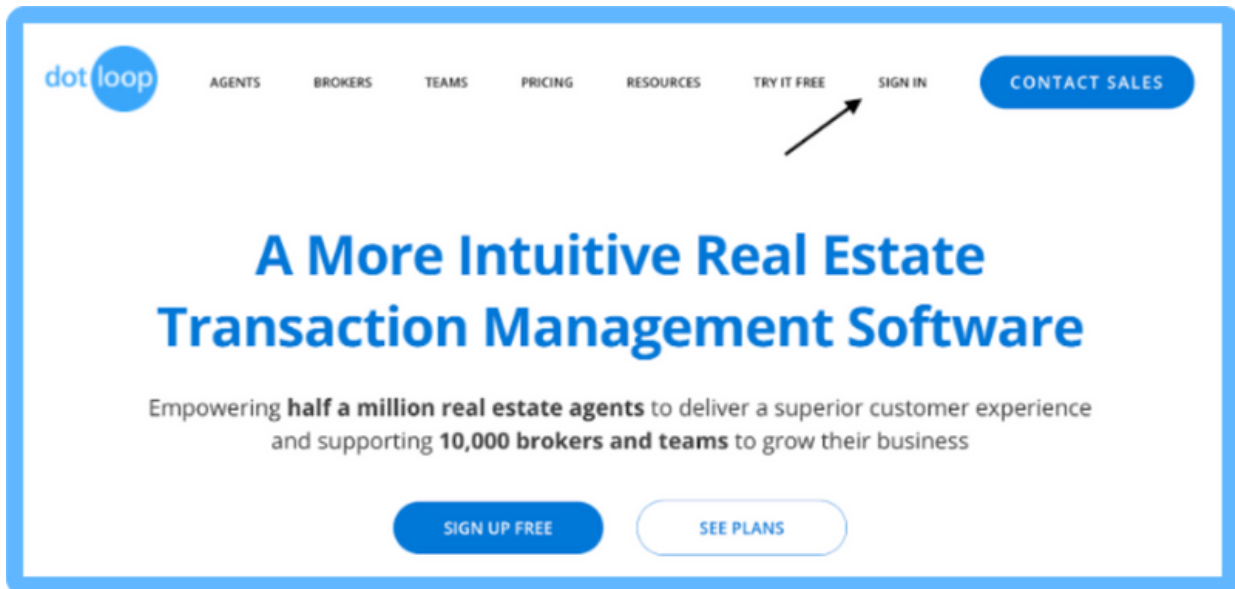
all your contacts and leads, with the most customization and flexibility possible. We then sync all of these contacts and leads across all our databases, to make everything seamless.

To learn how to access and get a rundown of the contacts app, follow the steps below.



Managing Dotloop Contacts

1. Log in to Dotloop



Finding Docs on Dotloop



Choose documents to add. ✕

SEARCH

SAMPLE TENANT DOCS SELECT ALL HIDE ALL DETAILS

- BROKERAGE MISC DOCS
- TREC INTERACTIVE FORMS
- TEXAS REALTORS INTERACTI...
- WORKSHEETS
- INTERACTIVE DOCS
- HOUSTON ASSOCIATION OF ...

WIRE TRANSFER AUTHORIZATION FOR ... OPTIONAL
 Updated June 11, 2022 Provided by Alma Flores

INDEPENDENT CONTRACTOR AGREEME...OPTIONAL
 Updated June 11, 2022 Provided by Alma Flores


Addendum to Independent Contractor ... OPTIONAL
 Updated June 11, 2022 Provided by Alma Flores

COPY

REQUIRED BUYER DOCUMENTS	
TAR	<input type="checkbox"/> Residential Buyer/Tenant Representation Agreement (TAR 1501)
TAR	<input type="checkbox"/> Information About Brokerage Services (TAR 2501)
TAR	<input type="checkbox"/> General Information and Notice to Buyer (TAR 1506)
HAR.com	<input type="checkbox"/> Broker Notice to Buyer/Tenant (HAR 410)
TXR	<input type="checkbox"/> Wire Fraud Notice or TXR 2517
TAR	<input type="checkbox"/> Information About Property Insurance for a Buyer (TAR 2508)
	<input type="checkbox"/> HAREI-Hou.Assoc.of.RELE.Inspectors List (Insert Buyer(s) Signatures)
TAR	<input type="checkbox"/> For Your Protection: Get A Home Inspection (TAR 1928) (Insert Buyer(s) Signatures)

REQUIRED UNDER CONTRACT	
TXR	<input type="checkbox"/> Executed Contract (TXR 1601,1603,1604,1605,1607,1608,1609,1701 or Builder Contract)
TXR	<input type="checkbox"/> Third Party Financing Addendum Signed (TXR 1901) (Only for Buyers with Financing)
	<input type="checkbox"/> Buyer Pre-approval Letter for Financing / OR Proof of Funds for CASH BUYERS
TAR	<input type="checkbox"/> Inspector Information (TAR 2506)
TXR	<input type="checkbox"/> Seller's Disclosure Notice Signed (TXR 1406) provided by Listing Agent

TAR	<input type="checkbox"/> Information about Special Flood Hazards Areas (TAR 1414)
TXR	<input type="checkbox"/> Buyer's Walk Through & Acceptance Form (TXR 1925)
	<input type="checkbox"/> MLS Full Agent Report with OP, P, PSHO, or S Status with TAX RECORD
TAR	<input type="checkbox"/> Addendum for Property Subject to Mandatory Membership in a Property Owners Association (TAR 1922) (ONLY APPLICABLE IF PROPERTY HAS HOA)
TXR	<input type="checkbox"/> Addendum for Lead Based Paint Disclosure Signed (TXR 1906) (IF APPLICABLE)
TAR	<input type="checkbox"/> Lead-Based Paint Pamphlet (TAR 2511) Insert Buyer(s) Initial(s) & Signature(s) (IF APPLICABLE)

*REQUIRED WHEN APPLICABLE BUYER COMPLIANCE DOCS	
	<input type="checkbox"/> Notice to a Purchaser of Real Property in a Water District (MUD/LID Disclosure HAR 400)
TXR	<input type="checkbox"/> Addendum for Lead Based Paint Disclosure Signed (TXR 1906)
	<input type="checkbox"/> Survey
TXR	<input type="checkbox"/> Notarized T-47 Residential Real Property Affidavit (TXR 1907)
TXR	<input type="checkbox"/> Intermediary Relationship Notice Signed (TXR 1409)
TXR	<input type="checkbox"/> Information about on-site sewer Facility Signed (TXR 1407)
TAR	<input type="checkbox"/> Signed Settlement Statement (Title Company)
TXR	<input type="checkbox"/> Communication Log
TAR	<input type="checkbox"/> Amendment to Contract (TAR 1903)
TAR	<input type="checkbox"/> Seller or Buyer Temporary Lease Signed (TXR 1910 or 1911)
TAR	<input type="checkbox"/> Addendum for Sale of Other Property by Buyer (TAR 1908)
TAR	<input type="checkbox"/> Non-Realty Items Addendum (TAR 1924)
	<input type="checkbox"/> Notice of Buyer's Termination of Contract (TAR 1902)
	<input type="checkbox"/> Release of Earnest Money (TAR 1904)

Open Templates: +New Folder

Business+ | Reporting | Loops | Tasks | People | **Templates** | House Matchma... Company

House Matchmaker Group LLC

Company | Activity Log | Notifications 99+ | + Add Loop

Search by address, title, MLS#, etc. | Filters (off) | Sort: Agent Name | Manage invitations

You have loop invitations that are unassigned.

Andy Su AOB Docs Type: None Creator: zhongquan su Edit Tags Archive Enter Closing	* Master Andy Su AOB Type: None Creator: zhongquan su Edit Tags Archive Enter Closing	20342 Pittsford Dr, Katy TX 77450 Type: Purchase Status: None Sale: Enter price Creator: ZHOGNQUAN SU Edit Tags Archive Closing 06.07.23	0 rustic Ln, Rosenberg, TX,77471 Type: Purchase Status: None Sale: Enter price Creator: ZHOGNQUAN SU Edit Tags Archive Enter Closing
21615 Park Wind Ct, Katy TX 77450 Type: Purchase	11707 Rastello Lane, Richmond TX 77406 Type: Purchase	14907 Oak Pines Drive, Houston, TX 77040 Type: Purchase	1210 Red Rock Canyon Dr, Katy, TX 77450 Type: Purchase

business+ | [Icons: Bar Chart, Loops, Tasks, People, Templates, Home]

Templates

Upload files by emailing housematchmakergroupllc@upload.dotloop.com

DOCUMENTS

- SPONSORSHIP FORMS
- TRAINING BUYER TEMPLATES**
- ALMA'S BUYER TEMPLATE-DO ...
- BUYER TEMPLATE
- TRANSACTION COORDINATING...
- COMPLIANCE CHECKLISTS
- SCRIPTS
- SAMPLE BUYER DOCUMENTS
- SAMPLE SELLER DOCS
- SAMPLE LANDLORD DOCS

SEARCH | + NEW FOLDER

TRAINING BUYER TEMPLATES

ADD A DOCUMENT

DRAG & DROP FILES HERE

TEMPLATES

Add an interactive form by selecting one from templates.

BROWSE

Search and add any PDF from your computer into this folder.

◀ S8 PG. 8 ▶

Create Folder: Buyer Templates

Create a folder

Name your new folder.

TRAINING BUYER TEMPLATES

CREATE FOLDER

Updated March 07, 2023 Provided by House Matchmaker Group LLC

Search for each document on the checklist



Scan me to find your NRDS ID

Templates

Upload files by emailing f...

DOCUMENTS

SPONSORSHIP FORMS

TRAINING BUYER TEMP

ALMA'S BUYER TEMPLA

BUYER TEMPLATE

TRANSACTION COORDI

COMPLIANCE CHECKLI

SCRIPTS

SAMPLE BUYER DOCUM

SAMPLE SELLER DOCS

SAMPLE LANDLORD DO

SAMPLE TENANT DOCS

Choose documents to add.

residential buyer

AMENDMENT TO BUYER/TENANT REPRESENTATION AGREEMENT (TXR 1505)

Residential Buyer/Tenant Representati... OPTIONAL

Updated July 07, 2022 Provided by Texas Ass...

Residential Buyer/Tenant Representati... OPTIONAL


Updated July 07, 2022 Provided by Texas Ass...

COPY

Pre-fill each form

Residential Buyer/Tenant Representation Agreeeme... FILE ▾ ADD ▾ SAVE

EMAIL - BUYING ... ▾ ASSIGNED TO NO ONE ▾ SERIF ▾ 11 ▾



RESIDENTIAL BUYER/TENANT REPRESENTATION AGREEMENT

USE OF THIS FORM BY PERSONS WHO ARE NOT MEMBERS OF THE TEXAS ASSOCIATION OF REALTORS®, INC. IS NOT AUTHORIZED.
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1. PARTIES: The parties to this agreement are:

Client: SARAH LEE

Address: 123 MAIN ST

City, State, Zip: HOUSTON, TX 77027

Phone: 713-517-5806

Email/Fax: SLEE@GMAIL.COM Email /Fax:

Broker: HOUSE MATCHMAKER GROUP LLC

ALMA FLORES

Address: 1333 W LOOP SOUTH

City, State, Zip: HOUSTON, TX 77027

Phone: 713-517-5806

Email/Fax: YOURHOUSEMATCHMAKER1@GMAIL.COM Email/Fax:

2. APPOINTMENT: Client grants to Broker the exclusive right to act as Client's real estate agent for the purpose of acquiring property in the market area.

3. DEFINITIONS:

A. "Acquire" means to purchase or lease.

B. "Closing" in a sale transaction means the date legal title to a property is conveyed to a purchaser of property under a contract to buy. "Closing" in a lease transaction means the date a landlord and tenant enter into a binding lease of a property.

Create new Loop for client

Add a new loop

1 Loop Name — 2 Template — 3 Photo — 4 Finish

Property Address or MLS#
TRAINING BUYER TEMPLATE

Unsure of the property address? Put in your client's name for now – you can always change it later.

Back Cancel **Continue**

Add a new loop

✓ Loop Name — 2 Template — 3 Photo — 4 Finish


Loop Template
Select **LEAVE BLANK**

Back Cancel **Continue**

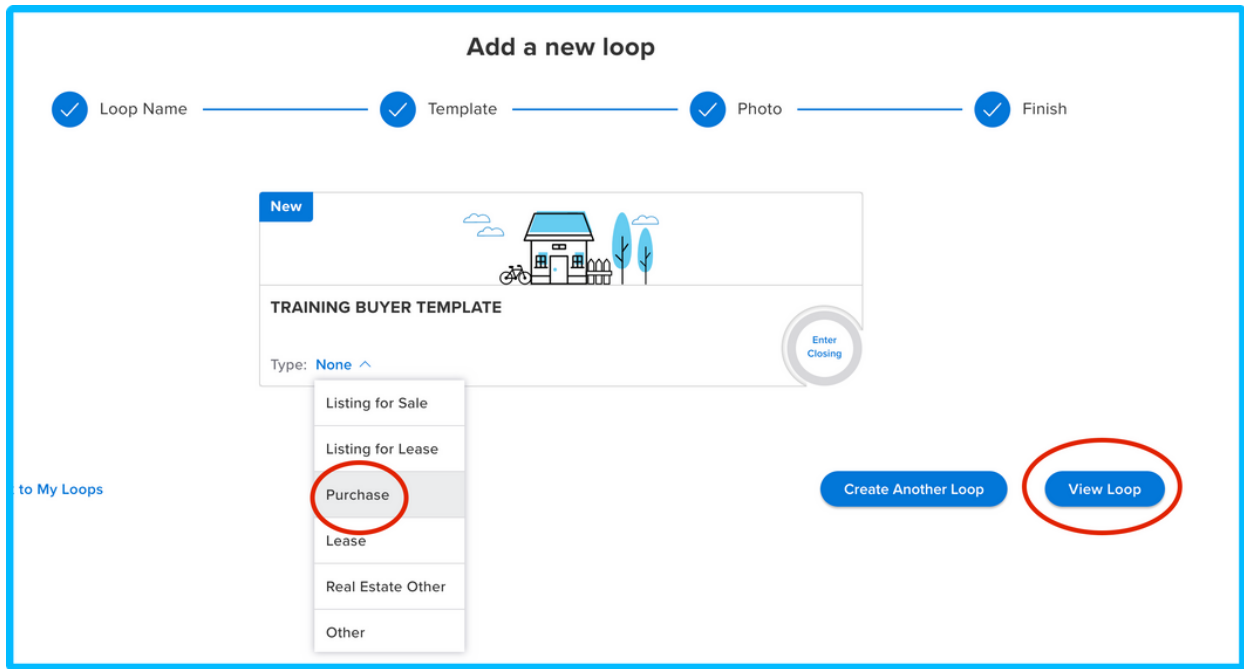
Add a new loop

✓ Loop Name — ✓ Template — 3 Photo — 4 Finish

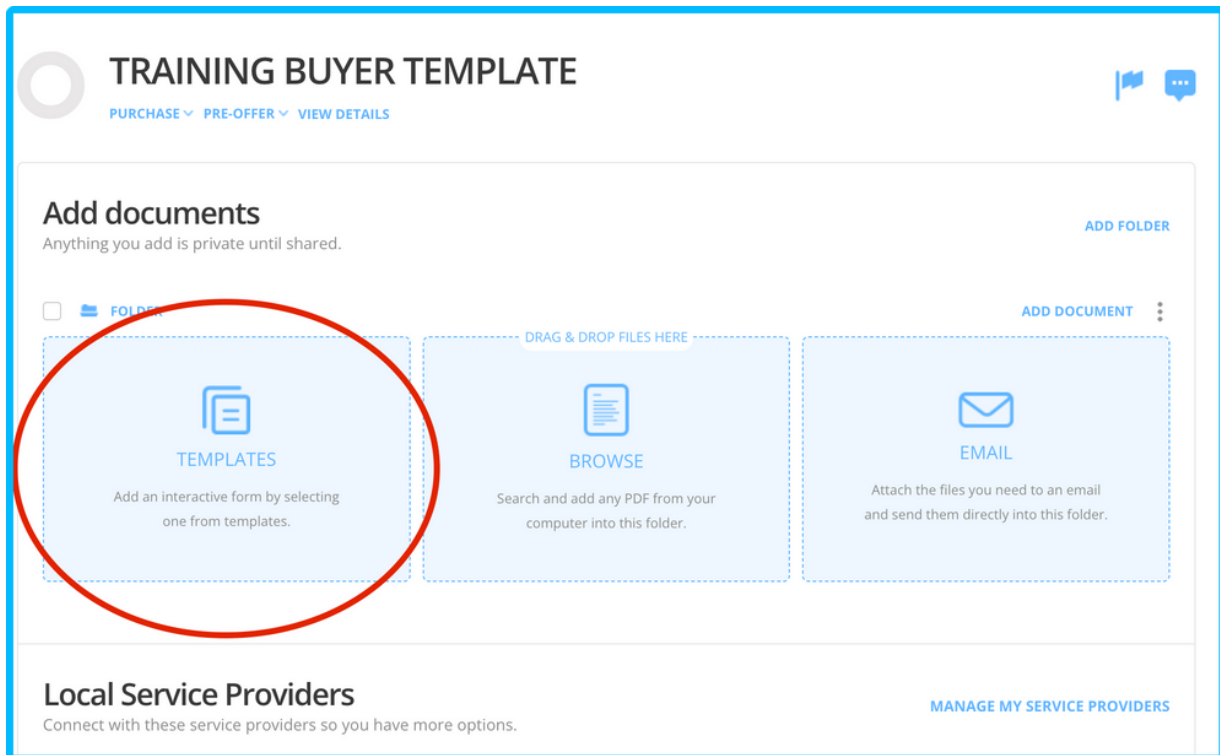
No file chosen

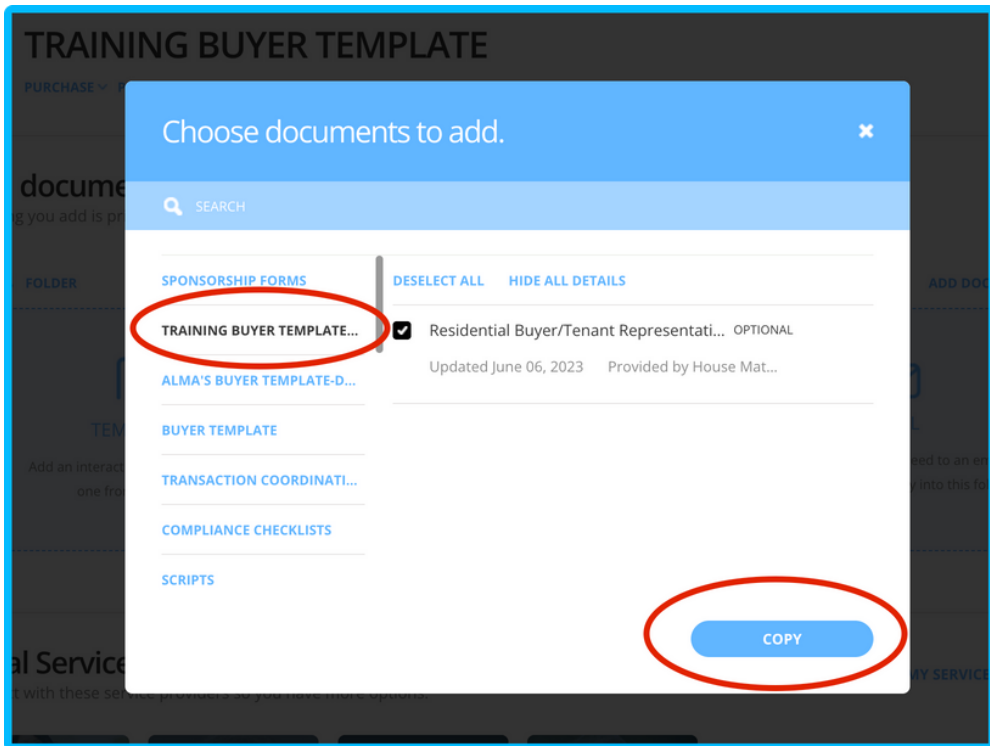

[Upload a photo](#)

Back Cancel **Done**

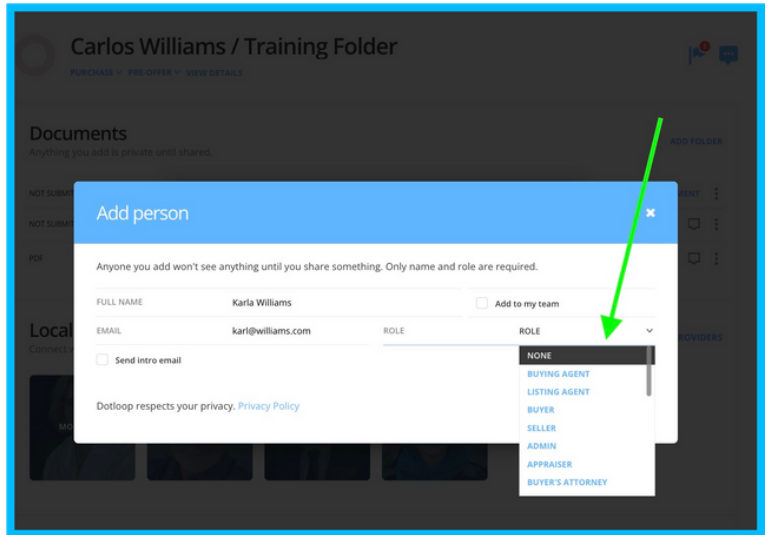
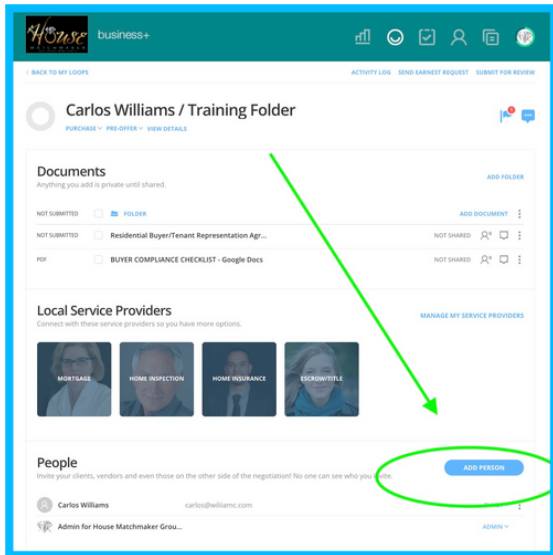


Open Templates and search for buyer template created.

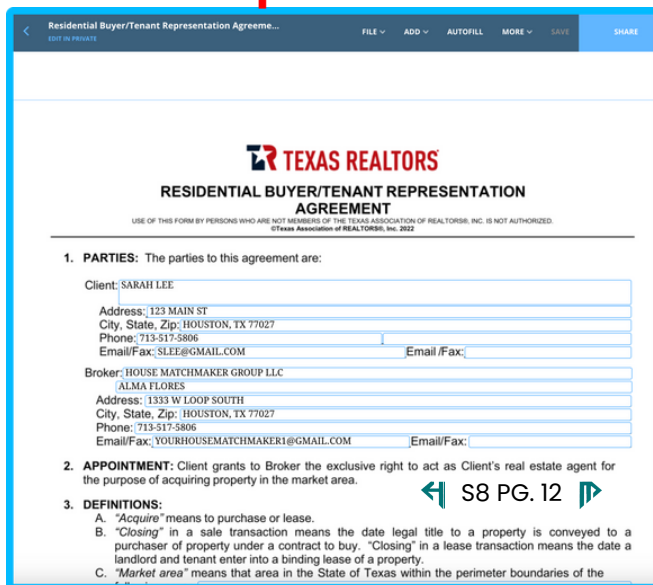




Add People to the Loop



Select pre-filed docs



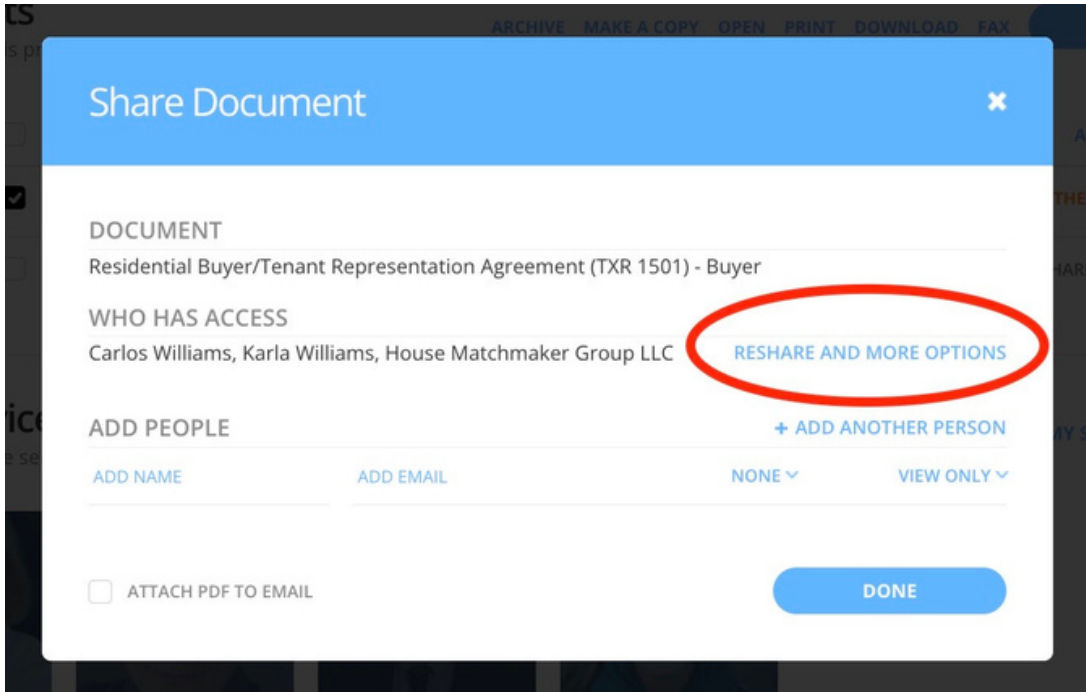
SCAN ME TO REDIRECT
TO DOTLOOP'S USER
FULL GUIDE

Ready to Share the forms? Don't forget to assign what access the client will have to the documents. Don't forget you can also add a memo/note!

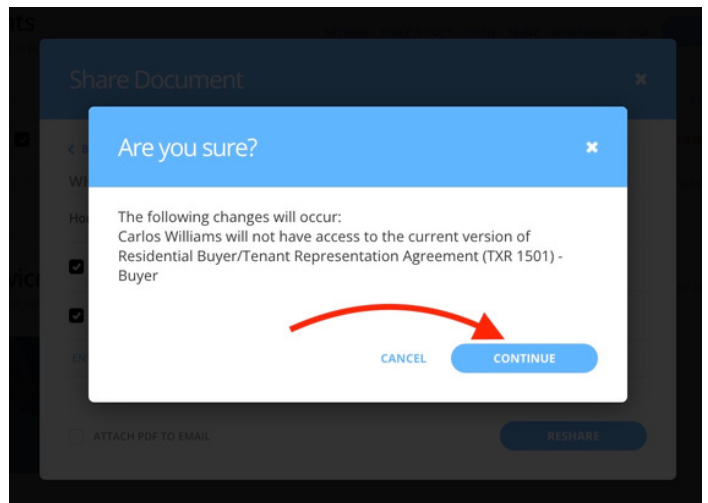
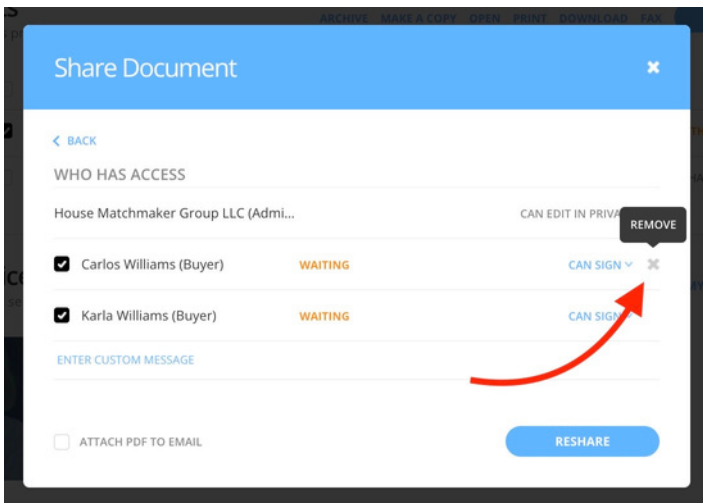
The screenshot shows a 'Share Document' window with the following elements:

- DOCUMENT:** Residential Buyer/Tenant Representation Agreement (TXR 1501) - Buyer
- ADD PEOPLE:** A list of two people: Karla Williams and Carlos Williams, both with the role 'Buyer' and '5 FIELDS ASSIGNED'. Each has a 'CAN SIGN' dropdown menu circled in red.
- ADD NAME:** A text input field with a green circle around it.
- NOTE:** A text area containing the message: 'Congratulations on getting your offer accepted. Please sign these forms at your earliest convenience. Jacob.... your House Matchmaker!'. This area is also circled in green.
- Permissions:** A dropdown menu on the right with options: 'VIEW ONLY', 'CAN SIGN', 'CAN FILL & SIGN', and 'CAN EDIT IN PRIVATE'. This menu is circled in green.
- ATTACH PDF TO EMAIL:** A checkbox at the bottom left.
- SHARE:** A blue button at the bottom right.

Need to reshare or retain access from the forms recently sent? No problem.



Clar, these next 2 screenshots can be displayed side by side.



MLS & Finding the Perfect Home

How to access HAR and Search Homes



1. Log in to the website:





2. Enter Matrix

Members Only Portal

Where to search: **Members Area** | Search: Enter any keyword | **SEARCH**

Virtual Appointment for Members Only >

Inbox for Alma Flores

MESSAGES | ACTIVITIES

Lead From NHAN PHAM on Nov 16 2022
HAR.com Lead: (email: nhanduypham@yahoo.com phone: 7134789901)
[View All Leads](#)

LEADS

Login to MLS

ENTER MATRIX MLS

Verify Your Information
Tutorial videos
Matrix training

Matrix 1-877-805-7301
SUPRA 1-877-699-6787

FEEDBACK

3. Click Search Tab

HAR.com | MY MATRIX | ADD/EDIT | **SEARCH** | TAX | STATS | MARKET REPORTS | FINANCE | LINKS

Enter shorthand or MLS#

News & Alerts
Feb 16 - Welcome to Matrix

HAR-Developed Showing Service
Showing Smart
Get Started TODAY!
www.ShowingSmart.com

Search

MLS Number
Price (000s)
Status
Street Number
Street Name
Street Type
Subdivision
Zip Code
City
Building SqFt
Bedrooms
Bathrooms

My Stats
You have no stats links

Recent Portal Visitors

Jimenez, Rosario	yesterday
McBride, David	yesterday
Fuentes, Cirenia	12/10/2022
Sandoval, Kember	12/10/2022
Martinez, Stephanie	12/09/2022
Moreno, Selene	12/08/2022
Flores, Alma	12/07/2022
Quezada, Vanessa	12/03/2022
Perez, Karla	12/03/2022
Ouedrago, Jamaica	11/30/2022

Concierge
20 Listings need your approval:



4. Hover over the SEARCH tab and select Quick-Single-family

MY MATRIX | ADD/EDIT | **SEARCH** | TAX | STATS | MARKET REPORTS | FINANCE | LINKS

Single-Family | Quick Single-Family

Quick Single-Family | Classic Single-Family

Townhouse/Condo

Lots

Quick Lots

Multi-Family

Country Homes/Acreage

Mid/Hi-Rise Condo

Rental

Quick Rental

Private Per Seller

Global

All Properties

Matrix Tax

Agent

Office

More...

My Stats

You have no stats links

Concierge

78 Listings need your approval:

MONARCH, TEAM OPEN HOUSES (19)

HOUSE, MATCHMAKER (15)

HOUSE, MATCHMAKER (15)

PRIORITY, OPEN HOUSES (15)

Flores, Yary (14)

My Carts

Flores, Alma - All Properties Cart (3)

All Properties Cart (3)

Hot Sheets

5. Select the Status of the Listing you want to check :

MY MATRIX | ADD/EDIT | **SEARCH** | TAX | STATS | MARKET REPORTS | FINANCE | LINKS

Enter Shorthand or MLS#

Criteria | Map | Results

Quick Single-Family

Status

Select All | Select None

Active

Option Pending

Pend Cont to Show

Pending

Sold 0-180

Withdrawn

Expired

Terminated

Coming Soon

Price and DOM

Price (List & Sold) (000s)

DOM

CDOM

Property Information

Sq Foot

Lot Size

Year Built

of Garages

New Construction

Beds

Full Baths

Half Baths

Stories

Private Pool

Location Information

Map Search: No Map Selected

Within () miles of () My Location

Subdivision

Master Planned Community

Days Back - Hot Sheets

Change Type

New Listing

Back On Market

Price Decrease



6. Click the Results

MY MATRIX | ADD/EDIT | SEARCH | TAX | STATS | MARKET REPORTS | FINANCE | LINKS

Enter Shorthand or MLS#

Criteria Map **Results**

Quick Single-Family

Status
Select All Select None
 Active
 Option Pending
 Pending Cont to Show
 Pending
 Sold
 Withdrawn
 Expired
 Terminated
 Coming Soon

Price (List & Sold)
Price (List & Sold) (000s)
DOM
CDOM

Property Information
Sq Foot
Lot Size
Year Built
of Garages
New Construction
Beds
Full Baths
Half Baths
Stories
Private Pool

Location Information
Map Search: No Map Selected
Within miles of My Location
St # Street Dir Street Name Unit Street Suffix
City/Location
County
Zip Code 77027
School District

Days Back - Hot Sheets
Change Type
New Listing
Back On Market
Price Decrease
Price Increase
Active
Option Pending
Pending Continue to Show
Pending
Sold
Coming Soon
Leased
Withdrawn
Expired
Terminated
Change Date

7. Click MLS number to view the property

MY MATRIX | ADD/EDIT | SEARCH | TAX | STATS | MARKET REPORTS | FINANCE | LINKS

CP

Criteria Map Results

Previous Next · 1-25 of 5000+ Checked 0 All · None · Page

#	TX	OH	MLS #	Stat	Class	AR	Office	Address	Subdivision	SF	Price	BR	Bth	DOM
1			67329267	A	Single-Family	10	WORD01	9614 Top Gallant Court	Steeplechase Sec 05	1,358	\$240,000	3	2/0	0
2			57947438	A	Single-Family	11	HELO01	780 Fair Street	Lincoln City Sec 04	884	\$299,900	3	1/0	0
3			42031252	A	Single-Family	12	SHUR01	4831 Yellow Ginko Trail	Cypresswood Landing	1,751	\$271,990	4	2/1	0
4			6090029	A	Rental	30	DEBN01	2312 Avenue M	Foerster Add	936	\$1,300	2	1/0	0
5			92534414	A	Lots	2	NUWA01	0 Kelley Street	Kashmere Gardens Park		\$118,000		0/	0
6			63768686	A	Single-Family	12	SHUR01	4910 Yellow Ginko Trail	Cypresswood Landing	1,947	\$276,990	4	2/1	0
7			28789234	A	Rental	17	COLD06	6027 Cypress Street	Braeburn Terrace Sec 1 Pt R	1,550	\$2,300	3	2/1	1
8			30084800	A	Rental	18	FCLR01	3402 Knott's Oaks Trail	Glen Iris	1,473	\$1,600	3	1/1	0
9			31795794	A	Rental	42	JPAS01	107 Crestway Street	Angleview Add	1,440	\$1,375	3	2/0	0
10			84761927	A	Rental	25	UHR001	21307 Cypress Live Oak Dr	Cypress Oaks	1,860	\$2,350	4	2/0	0

Sending Homes to Clients by Email

Step 1: Select the properties that you like to Email. Click the checkbox and on the lower part, On the actions Tab please select Email

The screenshot shows the HAR.com search results page. The search criteria are 'CP'. The results table has columns for #, TX, OH, MLS #, Stat, Class, AR, Office, Address, Subdivision, SP, Price, BR, Bth, and DOM. The first three rows are checked. At the bottom, the 'Actions' menu is open, and the 'Email' button is highlighted. A red circle is drawn around the 'Print/Email PDF' button, and an arrow points to it from the text below.

#	TX	OH	MLS #	Stat	Class	AR	Office	Address	Subdivision	SP	Price	BR	Bth	DOM
1			67329267	A	Single-Family	10	WORD01	9614 Top Gallant Court	Steeplechase Sec 05	1,358	\$240,000	3	2/0	0
2			57947438	A	Single-Family	11	HELD01	780 Fair Street	Lincoln City Sec 04	884	\$299,900	3	1/0	0
3			42031252	A	Single-Family	12	SHUR01	4831 Yellow Ginko Trail	Cypresswood Landing	1,751	\$271,990	4	2/1	0
4			6090029	A	Rental	30	DEBN01	2312 Avenue M	Foerster Add	936	\$1,300	2	1/0	0
5			92534414	A	Lots	2	NUWA01	0 Kelley Street	Kashmere Gardens Park		\$118,000		0/	0
6			63768686	A	Single-Family	12	SHUR01	4910 Yellow Ginko Trail	Cypresswood Landing	1,947	\$276,990	4	2/1	0
7			28789234	A	Rental	17	COLD06	6027 Cypress Street	Braeburn Terrace Sec 1 Pt R	1,550	\$2,300	3	2/1	1
8			30084800	A	Rental	18	FCLR01	3402 Knotty Oaks Trail	Glen Iris	1,473	\$1,600	3	1/1	0
9			31795794	A	Rental	42	JPAS01	107 Crestway Street	Angleview Add	1,440	\$1,375	3	2/0	0
10			84761927	A	Rental	25	UHR001	21307 Cypress Live Oak Dr	Cypress Oaks	1,860	\$2,350	4	2/0	0
11			69496609	A	Rental	15	EILE01	26614 Weir Way	Dogwood Hills 03	1,456	\$1,895	3	2/0	0
12			57013266	A	Single-Family	15	SHUR01	14021 Lamprey Drive	River's Edge	2,100	\$289,548	4	3/1	0
13			54996435	A	Lots	2	VMAS01	7018 Rayway Drive	Steinman		\$188,651		0/	0
14			60000000	A	Rental	2	COOR01	3100 Grand Street	Vineyard Colony	1,734	\$1,500	3	2/0	0

Step 2: Select the recipient or you can create a new contact and make sure to include a personalized

The screenshot shows the 'Email 1 Listing' form. The 'From:' field is filled with 'Alma Flores <yourhousematchmaker1@gmail.com>'. The 'To:' field is empty, and the 'CC:' field is also empty. A red circle is drawn around the 'Create a New Contact' button, and an arrow points to it from the text below. The 'Bcc:' checkbox is checked. The 'Display:' field is set to '360 Property View'. The 'Language:' field is set to 'English'. The 'Subject:' and 'Email Body:' fields are empty. The 'Characters Remaining:' field is also empty.

Sending Homes to Clients by Email

Email 1 Listing

From: "Alma Flores" <yourhousematchmaker1@gmail.com>

To: |

CC:

[Create a New Contact](#)

Bcc me a copy of this message.
You have selected 1 display to email.

Display: 360 Property View

Language: English ▾

Subject:


Email Body: dddd

Characters Remaining:


Signature:

"... Oh, by the way. I am never too busy for your referrals."

Warm Regards,



www.HouseMatchmaker.com



~Treating your referrals as family~

Download my **FREE** Home Search App

[Texas Real Estate Commission Information About Brokerage Services](#)

[Texas Real Estate Commission Consumer Protection Notice](#)

[Edit Your Signature](#)





**SCAN ME TO REDIRECT TO
MATRIX YOUTUBE RESOURCES**


Understanding the Auto Email Plans.

~Treating your referrals as family~
Download my **FREE** Home Search App
[Texas Real Estate Commission Information About Brokerage Services](#)
[Texas Real Estate Commission Consumer Protection Notice](#)
[Edit Your Signature](#)


Language: English
 Español

 Criteria:

 This page saves the below Search Criteria (1 Listing, plus all new matches) as an Auto Email, *not the 1 checked Listing*.
Property Type is 'Single-Family'
Status is 'Active'
Current Price is 200000 to 220000
Zip Code is like '77449*'


 Settings

Concierge: Enable concierge mode
 Show this contact in Reverse Prospecting results
 Enable as a Favorite Search on Home tab (10 maximum)

 Schedule

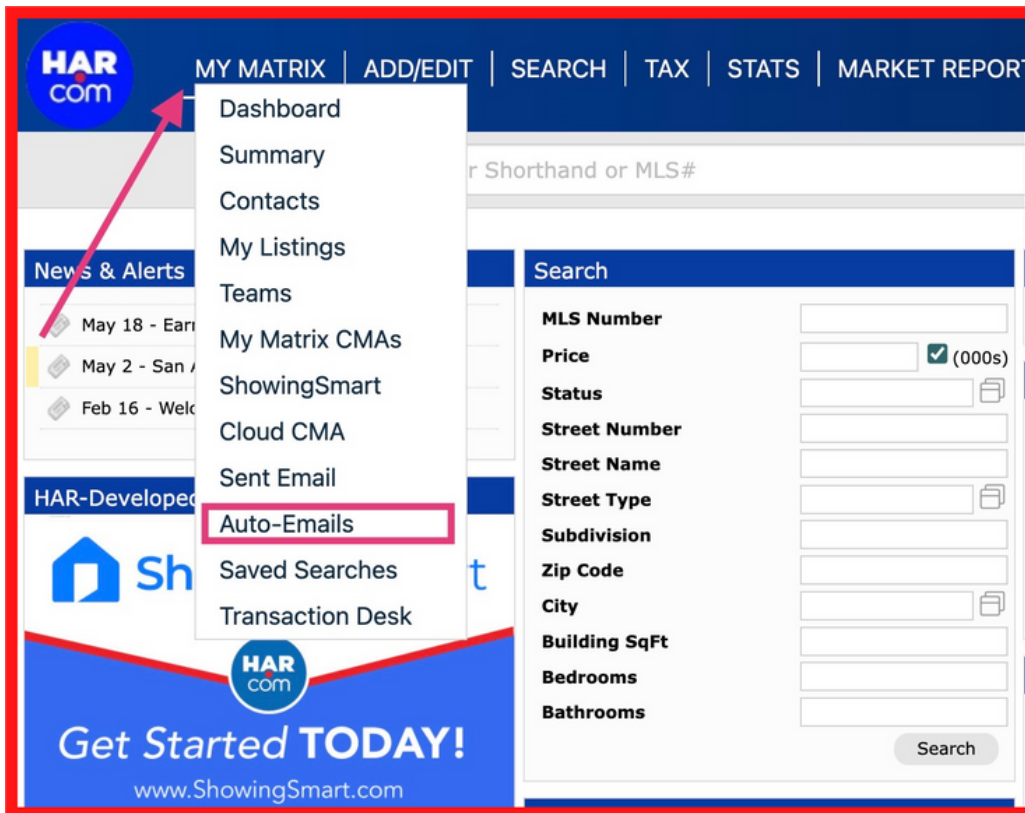
ASAP: Emails are sent as soon as possible.
 Daily: Emails are sent on the days you choose.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input checked="" type="checkbox"/> All AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM	<input checked="" type="checkbox"/> AM
<input type="checkbox"/> All PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM	<input type="checkbox"/> PM

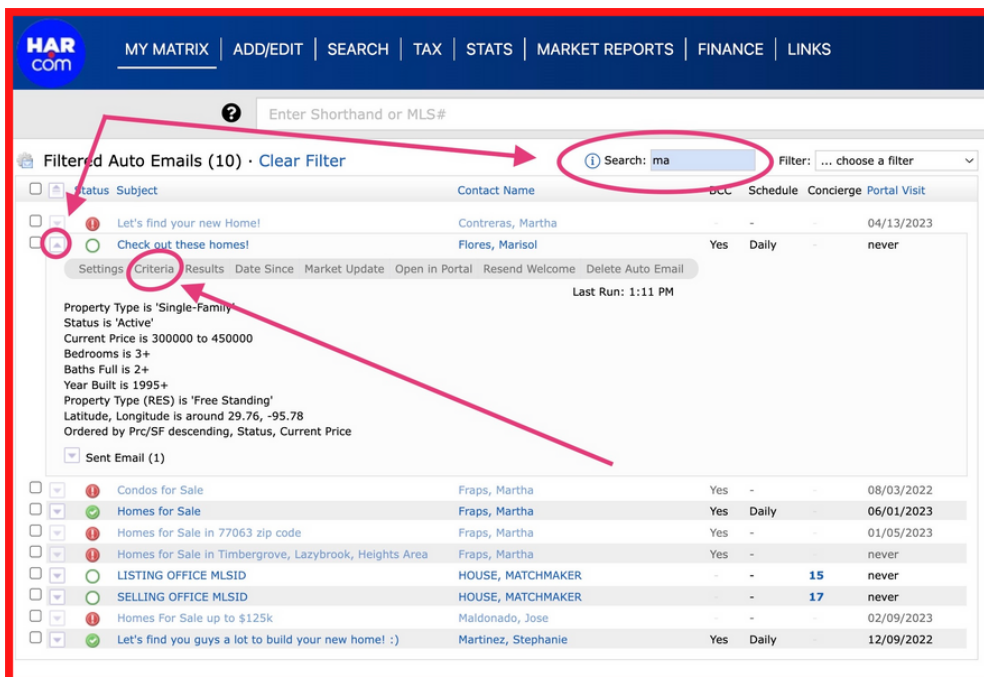
 [Clear](#)

Monthly: Emails are sent on the first of the month at midnight.

Editing a Previously Made Auto Email Plan



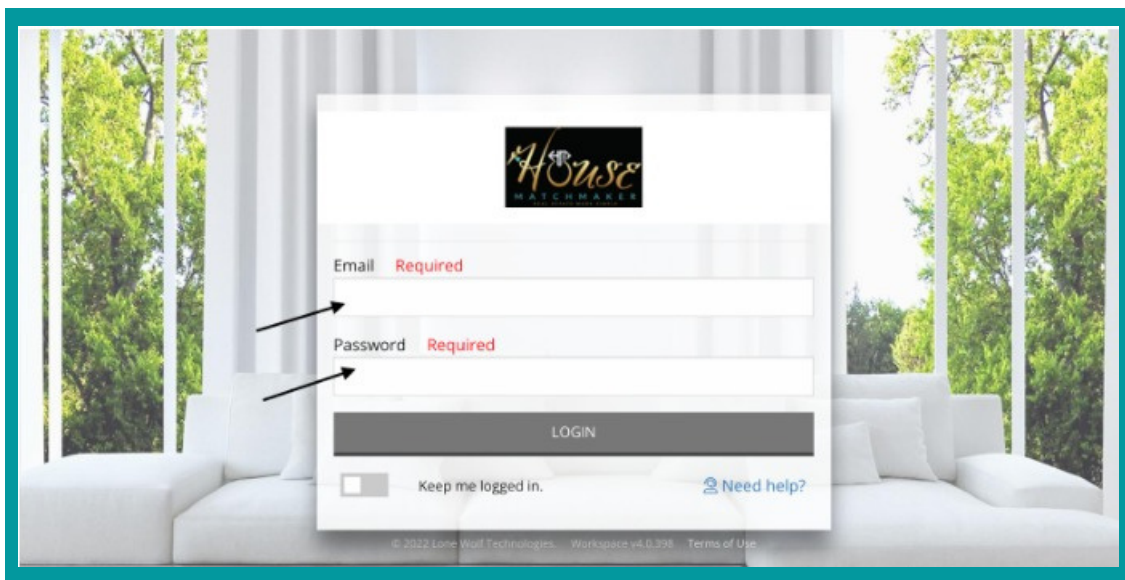
1. Search for the Client's name in the search bar.
2. Click on the drop down menu to the LEFT of the Status Icon
3. Click on the "Criteria" tab to EDIT | UPDATE | CHANGE a set search criteria.



Managing your account in House Matchmaker Intranet

Managing your account in House Matchmaker Intranet

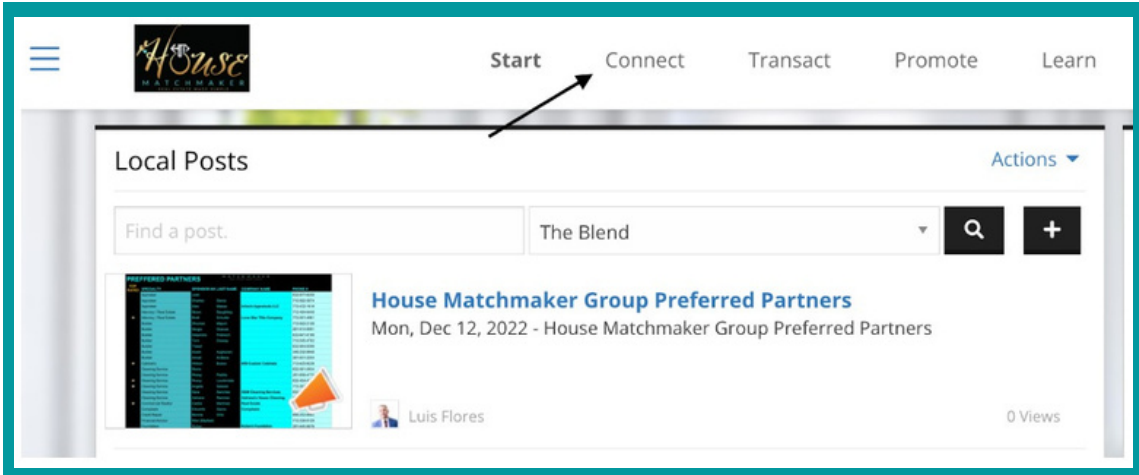
Log in to the Website:



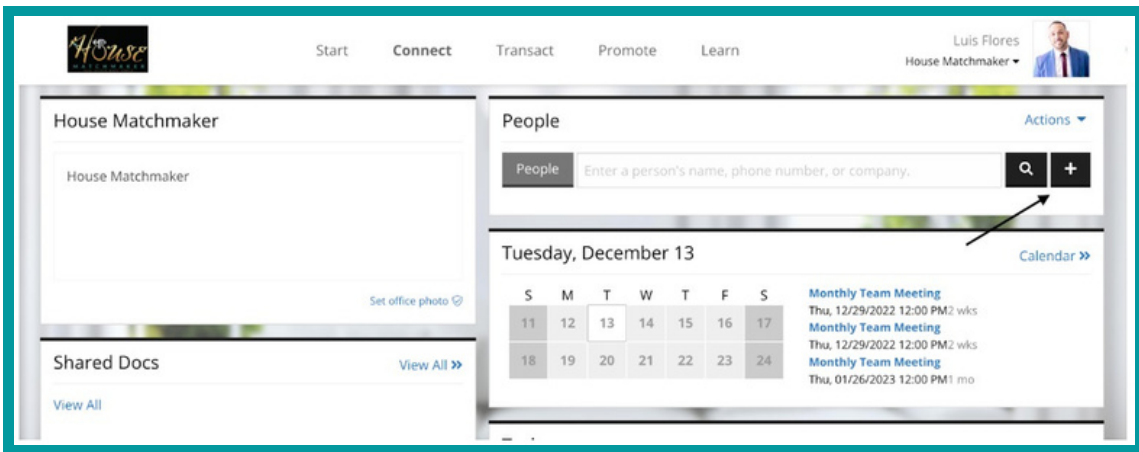
ADDING NEW CONTACT



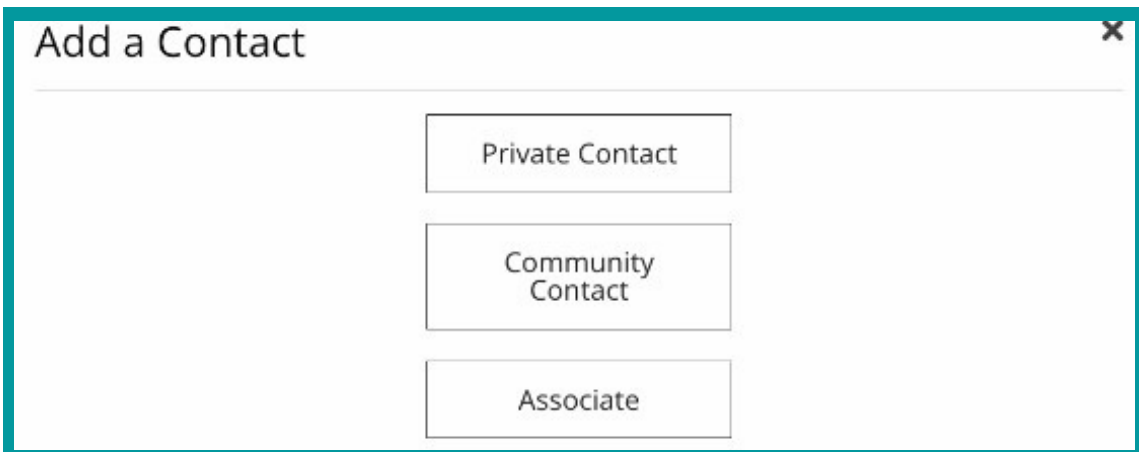
1. Click Connect



2. Click the Add Button



3. Choose the role





4. Fill out the information

Shared contacts save everyone time.

Creating duplicate contacts slows everyone down, be sure to re-use the same contacts.

First Name

Last Name

Company

Email Address

Phone Number

No email address available.

Add New Contact

NOTE: FOR ASSOCIATES

Start Connect Transact Promote Learn

Yuma Flores Houston

View Profile
Account
Settings
Reports
Control Panel
Integrations
Logout

Wednesday, June 7

S M T W T F S
4 5 6 7 8 9
11 12 13 14 15 16

S7: Get Paid/ S8: Systems (Dotloop, Intranet)
Wed, 06/07/2023 10:00 AM today
Open Houses
Sat, 06/10/2023 2 days
Open Houses
Sun, 06/11/2023 3 days

Featured Videos

Click your name and click Edit Contact Info

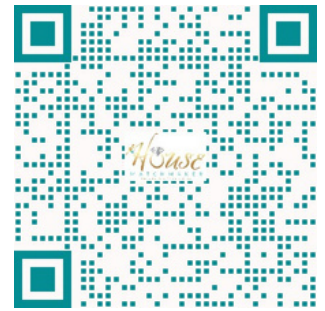
Profile Account Settings Activity

Show All

@gmail.com other

Actions

- Add a Supporter
- Edit Contact Info
- Edit Profile Details
- Impersonate
- Edit Account**



All the information should be filled out and updated

Filling in your info for tax end-of-year 1099 forms is essential for accurate reporting, compliance, and minimizing risks. It ensures proper tax assessment, transparency, documentation, and financial integrity within the industry.

Karly Solis

Cancel & Go Back Update Account

Office Assigned Home Office <small>Changing office will reload page.</small> Katy [HMMG01] (House Matchmaker)	Tax <input checked="" type="radio"/> No Corporation <input type="radio"/> Yes, use: Agent Tax EIN: 00-0000000 Agent Corp Name for Funding: e.g. My Payments, LLC
Account Login Email: karly.housematchmaker@gmail.com BackAgent Subscription Level: Full Account Transfer From / Admin Note: <input type="text"/>	Private Info SSN/TIN: 000000000 Date of Birth: 0/0/0000 Driver License or ID Card: Driver License Texas ID Number: <input type="text"/>
Sponsoring Associate: <input type="text"/> add sponsor Staff Recruiter: <input type="text"/> add recruiter	License State: TX License Type: Sales License Number: <input type="text"/> Date Expires: <input type="text"/> Add License
Account Additional NRDS ID: <input type="text"/>	MLS MLS Membership: Local MLS (No IDX) Agent ID: <input type="text"/>
Finances Associate Member/Commission Plan: Variable Plan Plan Effective Date: 0/0/0000 Billing Date: 0/0/0000 Bank Account Name: House Matchmaker Group LLC Invoicing: Credit Card Auto-Bill	

Take advantage of all the amazing tools and resources provided for you.

The screenshot shows the Inman House website dashboard for user Alma Flores in Houston. The top navigation bar includes 'Start', 'Connect', 'Transact', 'Promote', and 'Learn'. A 'Boost' banner at the top left says 'Reach more of the right people.' with a 'DISCOVER BOOST' button. On the right, a calendar for Wednesday, June 7 is displayed, with a 'Calendar' link. Below the calendar, system updates are listed: 'S7: Get Paid/ S8: Systems (Dotloop, Intranet)' on Wed, 06/07/2023 10:00 AM today; 'Open Houses' on Sat, 06/10/2023 2 days; and 'Open Houses' on Sun, 06/11/2023 3 days.

The main content area is titled 'Local Posts' and features a search bar for 'The Blend'. Several posts are listed, each with a thumbnail, title, date, and view count. Orange arrows point from the 'Boost' banner to the following posts:

- SUBSCRIBE TO THE OFFICE CALENDAR. DON'T MISS ANOTHER TEA...** (Fri, Mar 17, 2023) - 1 Comment, 42 Views
- W9 FOR HOUSE MATCHMAKER** (Wed, Apr 26, 2023) - 8 Views
- TELL A FRIEND! WE OFFER SO MUCH!** (Wed, Apr 19, 2023) - 8 Views
- ORDER YOUR SIGNAGE** (Thu, Apr 13, 2023) - 17 Views
- SET UP YOUR DEVICES TO THE OFFICE PRINTER** (Mon, Apr 3, 2023) - 27 Views

At the bottom right, there is a 'Featured Videos' section with a video titled 'IN STUDIO' by Propertybase, featuring John Voigt and John Cates. Below it, a section for 'Associate Access Activity' shows a pie chart and statistics: 1 Signed In, 23 Last 7 Days, and 30 Last 30 Days.

The Calendar: Don't miss out on the Office Activity. Access your Open Houses, plan to attend any missed or new training sessions and join us at our next Monthly Team Meeting.

The screenshot shows a calendar interface for July 2023. The calendar is viewed from Sunday, July 23 to Saturday, July 29. The events are as follows:

Day	Date	Event
Sunday	23	Open Houses
Monday	24	Open Houses
Tuesday	25	Mlc Meeting
Wednesday	26	S1: Failure is ... TSAHC CE Class...
Wednesday	27	S3: Cm... Clas...
Wednesday	28	S5: Working wit...
Wednesday	29	S7: Get Paid / ...
Thursday	30	Open Houses
Friday	31	Team Meeting
Saturday	1	Open Houses
Saturday	2	Open Houses
Saturday	3	Open Houses
Saturday	4	Open Houses
Saturday	5	Open Houses
Saturday	6	Open Houses
Saturday	7	Open Houses
Saturday	8	Open Houses
Saturday	9	Open Houses
Saturday	10	Open Houses
Saturday	11	Open Houses
Saturday	12	Open Houses
Saturday	13	Open Houses
Saturday	14	Open Houses
Saturday	15	Open Houses
Saturday	16	Open Houses
Saturday	17	Open Houses
Saturday	18	Open Houses
Saturday	19	Open Houses
Saturday	20	Open Houses
Saturday	21	Open Houses
Saturday	22	Open Houses

Blue arrows indicate a flow from the Wednesday events to the Team Meeting and an Open House on Sunday. Orange circles highlight the Team Meeting, the Open House on Sunday, and the Wednesday events.