



## **Matrix Functionality for Teams and Assistants**

Canopy MLS has created the ability to add agents and listings to “Teams” in Matrix. We recognize that teams can be comprised of various agents, licensed assistants, and support staff. Please use the following instructions and guidelines to take advantage of this new functionality.

When creating a team, don't forget to consider Realtor® association membership, Supra Key/SentriLock use and subscription to Canopy MLS.

### **Yes, the teammate needs to join the Realtor® association.**

All active real estate licensees (including licensees performing assistant duties) affiliated with a Designated Realtor®/broker-in-charge must join the Realtor® association or have a non-member licensee assessment fee paid for them.

### **Yes, the teammate needs to join the MLS.**

Some agents think that if they are a member of a team and only one person on the team adds or edits listings in Canopy MLS, that the rest of the team does not need to subscribe to Canopy MLS – that is false. All active real estate licensees, including but not limited to those who are part of a real estate team or who represent buyers exclusively, licensed or certified appraisers and appraisal trainees affiliated with a Member Participant (MP, typically the broker-in-charge) must subscribe to Canopy MLS or qualify for a waiver.

### **Yes, each Canopy MLS user must use his/her own MLS login name & password.**

Users must not disclose an MLS login name or password to anyone. An infraction of this rule carries a fine: \$1,000 for the first violation, \$3,000 for the second violation, and a one-year expulsion from Canopy MLS for the third violation.

### **Canopy MLS policies on teams.**

1. To request a new team ID or changes relating to the team, the Member Participant of the office must complete and submit the [team information form](#).
2. Teams conducting real estate in South Carolina must comply with the law that says, “No team may imply that the team is a separate entity from the brokerage firm of its employment,” and, “team names may not include the terms ‘realty,’ ‘real estate,’ ‘Realtors®,’ or similar terms suggesting a brokerage.”
3. If the agent is the broker-in-charge for the team and the team is registered at the North Carolina Real Estate Commission or the South Carolina Labor and Licensing Board and requires MLS access, then the team must join Canopy MLS as a member firm and pay applicable initiation fees. Each licensee affiliated with the team must

join Canopy MLS or qualify for a waiver. Realtor® dues and/or non-member licensee assessment fees may be applicable.

4. All listings entered under the team, and all closings reported with the team name as the “Selling Agent,” will remain with the team forever.
5. Canopy MLS staff will not substitute the actual selling agent involved in the transaction and named on the purchase agreement with the name of any other team member.
6. The Canopy MLS Rules and Regulations require listings to be complete and accurate in every detail that is reasonably ascertainable (Section 1 #7). The individual listing agent identified on the listing agreement and the individual selling agent identified on the purchase agreement must be reported in the MLS. When the listing agent or selling agent is on a team, be sure to include the name of the team on the listing agreement and the purchase agreement in addition to the individual listing agent or selling agent. When updating listings include the Team ID in the Listing Agent Team ID or Selling Agent Team ID field if the listing or sale belongs to a team.
7. Realtor.com, Zillow, ListHub syndication sites and IDX website vendors receive data feeds from Canopy MLS with both the individual listing agent name and team name. If you’d rather have your listings appear with the individual listing agent or individual selling agent, you must remove the Team ID from the Listing Agent Team ID or Selling Agent Team ID field in Add/Edit. Third party sites will be able to use team data to identify team listings no matter who on the team is the listing agent.
8. Additional resources:  
North Carolina Real Estate Commission guidance on teams:  
<https://www.ncrec.gov/Pdfs/genupdate/teamingup.pdf>

South Carolina Real Estate Commission outline of significant 2017 changes to the licensing law (includes teams): [2017 Real Estate Commission New License Law Changes Outline](#)

### **Adding a Team Member and Adding a Team to a Listing in Matrix**

Once the team name is added by Canopy MLS staff, the Member Participant can add agents from the same office to the team. Watch: [Adding a Team Member in Matrix](#). Adding and removing agents from the team is the responsibility of the Member Participant.

After the agents are added to the team, the listing agent or the Member Participant can add the team to the listing. Watch: [Adding a Team to a Listing in Matrix](#).

**Assistant Access to MLS:** Unlicensed assistants who plan to access the MLS system must:

- complete the appropriate assistant paperwork, which must be signed by the MP of the firm
- pay a non-refundable, one-time orientation fee of \$25 and quarterly fees
- **attend MLS Orientation** before access to the Canopy MLS system will be provided

The assistant will be provided a unique username and password. If an assistant supports more than one agent in *different* firms, that assistant will be issued two different user identification numbers, and will be required to pay access fees under each firm.

Any assistant found to hold an active real estate or appraisal license or found to be a party to a listing agreement, a buyer agency agreement or named as the listing agent or selling agent on a purchase agreement will have their MLS access suspended until proper paperwork and applicable start-up fees are submitted as a Subscriber. The licensee will also be scheduled for the next available MLS orientation class. Failure to attend this class will result in the inactivation of their MLS. The licensee has 15 business days to complete this process. In addition, the MP of the office will be fined \$1,000.

**Does the teammate need a Supra Key or SentiLock access to the team's listings or to show property?** If the answer to this question is YES, then the team member must obtain his or her own Supra Key or SentiLock access. Important to remember is that unlicensed assistants are not eligible to lease a Supra Key or have SentiLock access. The lending of Keys for any reason is **strictly prohibited**, and each Keyholder is obligated to maintain the confidentiality of his or her individual PIN.

Keyholders using electronic Keys from other MLSs or associations that cooperate with Canopy MLS are subject to the Canopy MLS Rules and Regulations, penalties and fines on the same terms as all other Keyholders.

An infraction of this rule carries a fine: \$500 first violation and thereafter, fines shall be as determined by the Canopy MLS Board of Directors.

**How to set up Identity Sharing in Matrix™:** Identity Sharing allows you to share your account with other Matrix users to occasionally work as you. Each Matrix user that you add to your Identity Sharing has full access to your Matrix account and can either "impersonate" you or "work on your behalf," depending on the type of access you grant them.

Click the "My Matrix" tab, then the "Settings" link. At the bottom of the "My Settings" screen, you will find the "Identity Sharing" section. Click the link labeled "Click here to share your identity."

Type in the agent ID for the agent you want to allow to work as you. If you do not know the ID, you can find it through an agent roster search ("Roster" tab). Identity sharing

can only occur between agents affiliated with the same firm.

Select whether you want this person to “Impersonate” you or “Work on Behalf” of you. Click the “Add” button.

After adding the first person you can control the following:

- Add additional people (click the link “Add”).
- Delete people.
- Name your team (optional). Be sure to click the “Save” button after typing in your name.
- Disable the Identity Sharing function.

### **Unlicensed Assistants – Drawing the Line Between What They Can and Cannot**

**Do:** *The following article is reprinted entirely from the North Carolina Real Estate Commission (NCREC) Bulletin, October 2012, by Joan H. Floyd, Senior Consumer Protection Officer.*

There is a line between licensed and unlicensed in the world of real estate brokerage that requires the careful attention of brokers with unlicensed assistants who help them with their business and may work directly with buyers and sellers.

A complaint from a buyer or seller that the “broker” with whom they are working is not licensed as a broker is often followed by the actual broker explaining that the “broker” is really an unlicensed assistant.

The question then arises: Did the assistant cross the line between licensed and unlicensed when providing services requested by the client or the broker?

Because clients do not always know who is licensed in a brokerage office or precisely what rights a license confers, brokers should inform clients of the limits placed on their unlicensed assistants in providing services. Otherwise, there is considerable opportunity for confusion.

The best course of action is to explain matters to the client at the beginning of the relationship and, as an aid in doing that, provide the two lists below which draw that important line between what is allowable and what is not.

#### **Unlicensed assistants MAY:**

- Receive and forward phone calls, texts and emails to the employing broker or other licensees in a firm;
- Submit listings and changes to a MLS provider, but only if the listing or change is based upon data supplied by a broker;
- Assist a broker in compiling documents for closing;
- Research and obtain copies of documents in the public domain, such as the Registers of Deeds, Clerks of Court, or tax offices;
- Obtain keys for listed properties;

- Record and deposit trust monies under the close supervision of the office broker-in-charge (BIC);
- Type in offer to purchase, contract and lease forms with information provided by brokers;
- Check license renewal records and other personnel information pertaining to brokers at the direction of the BIC;
- Prepare commission checks and otherwise act as bookkeeper for the firm's operating account under the close supervision of the BIC;
- Place "For Sale" or "For Rent" signs on property at the direction of a broker;
- Order and supervise routine and minor repairs at the direction of a broker;
- Act as a courier at the direction of a broker;
- Coordinate or confirm appointments between brokers and other persons;
- Schedule appointments for showing properties listed for sale or rent;
- Show rental properties managed by the broker to prospective tenants;
- Complete and execute preprinted form leases for rental property managed by the firm.
- Answer basic questions from prospective buyers and others about listed properties if the broker has provided the information in promotional materials.

**Only licensed brokers MAY:**

- Show properties for sale to prospective buyers;
- Answer questions from prospective buyers and others about listed properties.
- Offer opinions as to the seller's or landlord's intentions about a listed property;
- Solicit listings or management contracts from prospective clients;
- Prepare information to be placed in promotional material or advertisements for properties for sale or lease;
- Discuss or explain listings, management agreements, offers, agency agreements, leases or other similar matters with persons outside the firm;
- Negotiate the amount of rent, earnest money deposits, due diligence fees or other contract provisions in connection with properties listed for sale or rent by the firm.

Finally, remember that if you are a broker-in-charge, you are responsible for all money being held in a trust account and the accuracy of all advertising. Brokers-in-charge should be closely supervising all actions in those areas, especially when those duties are performed by unlicensed persons.