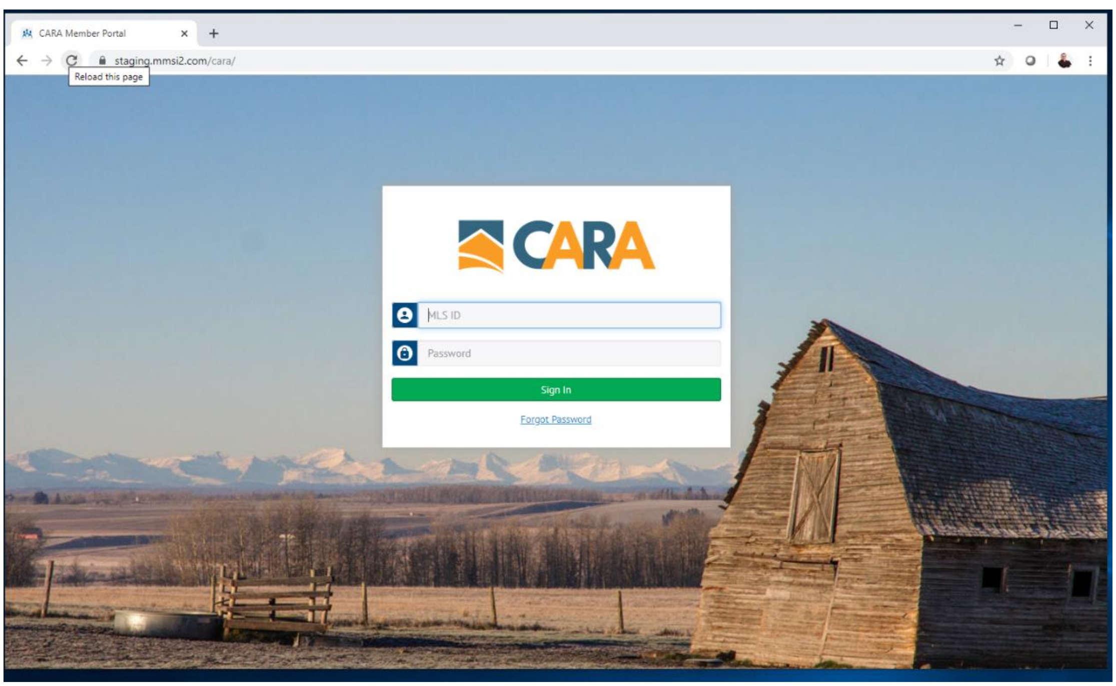
MMSi HELP NOTES

MMSi will become your entry point for the tools and services that CARA provides to help you be successful in your real estate business. It will also enable you to manage your Association account, register for Education offerings from CARA and register for meetings and events. These notes are intended as a quick guide through the various pages on the site, if you need further help please give the CARA office a call and we will be happy to find an answer for you! The main office phone number is **403-343-0881** and the office is open from **8:30 AM – 4:30 PM Monday through Friday** except on holidays and special events.

LOG ON SCREEN

There are two ways that you will be able to enter the Member Page. The first is through the public CARA website www.carassociation.ca – under MEMBER LOGIN you will be redirected to the Portal rather than realtorlink.



Afterwards, you may save a shortcut or bookmark on your desktop or mobile device that will take you directly to the page. **LOGGING IN** to the site is done using your current MATRIX ID; we want to ensure that we keep a straightforward process and NOT make you remember another set of credentials!

HOME PAGE

After logging in you will see the HOME PAGE on it the HEADER runs across the **TOP** of the page and has SHORTCUTS to several pages.

First in the TOP MIDDLE you have:

HOME –

MEMBER –

EDUCATION-

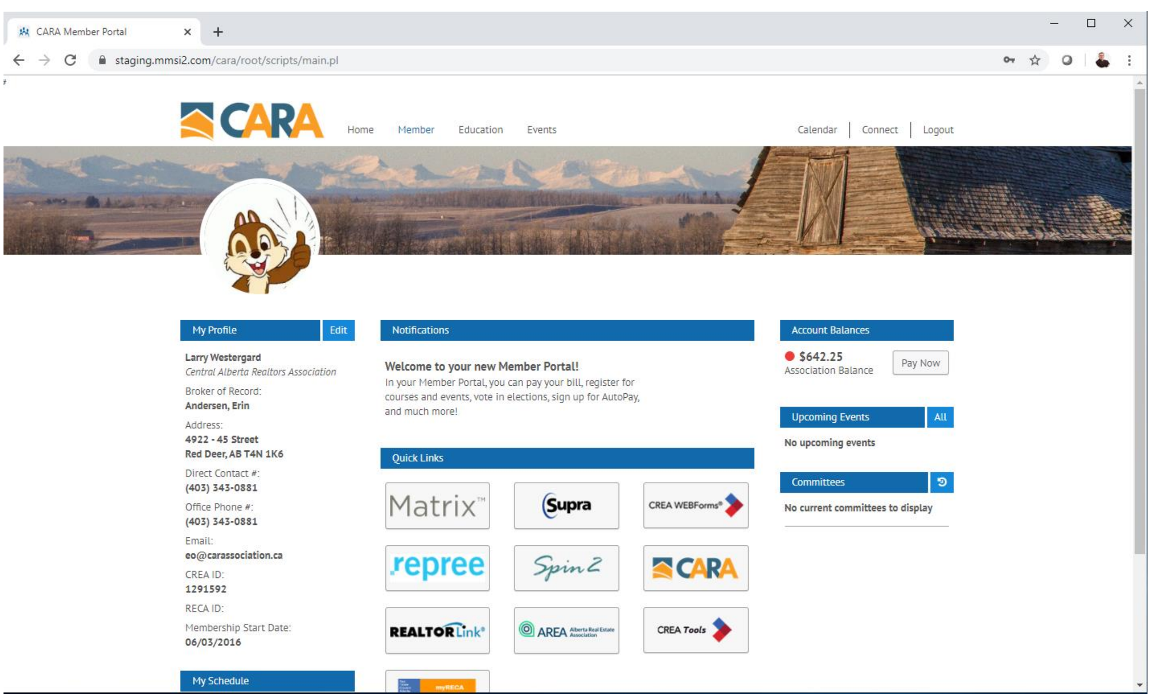
EVENTS –

Second on the UPPER RIGHT-HAND side you have:

CALENDAR

CONNECT

LOGOUT

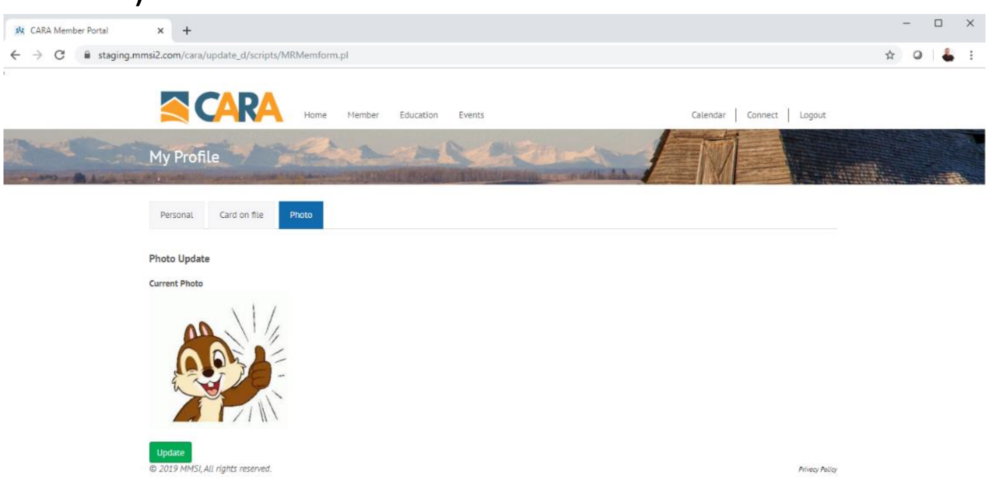


These options will always remain on the top of whatever page you are on. Hovering over one of these options will show any dropdown menu that is available for them

MIDDLE OF THE SCREEN

The Middle portion of the screen is divided into three columns; think of the left and right columns as containing things related to you personally and the middle column as more general info and tools.

In the **LEFT Column** is the PROFILE PICTURE that is on file – currently any picture that was on Matrix as your profile picture was, if compatible, brought over and posted. If you HOVER over the picture and CLICK, it will jump to your MEMBER PROFILE. There are THREE TABS – choose PHOTO (third tab) and the UPDATE (GREEN on the bottom).

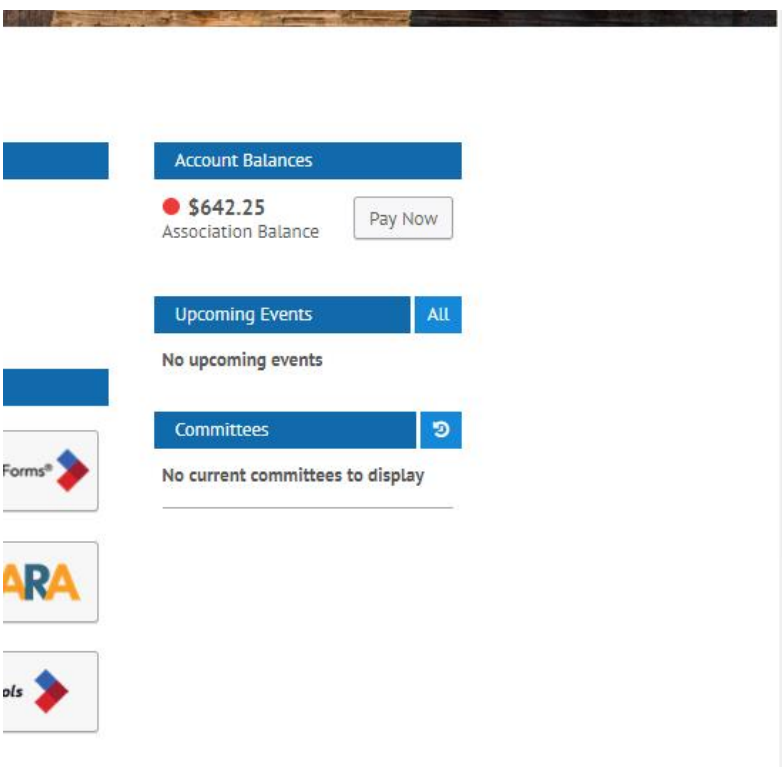


You can then click on the CHOOSE FILE button to browse your files for an IMAGE FILE that is compatible to upload.

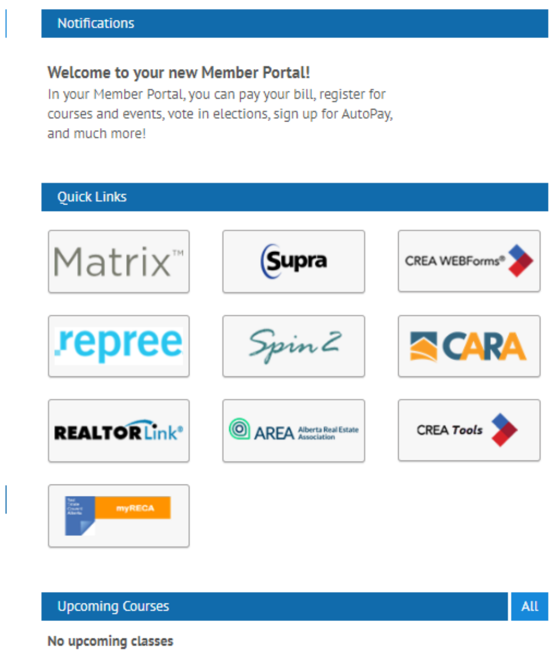
Under your PICTURE is your PROFILE details. This will display the information that you have entered in the MY PROFILE section – we will come back to that later.

Lastly, in the Left-Hand Column is MY SCHEDULE. This will display any meetings for committees you are a part of, or any Association events that you have signed up for.

In the **RIGHT Column** are three areas. The first is your ACCOUNTING with the Association. A RED dot means you have an outstanding balance which is then displayed next to it. You can click the PAY NOW button to go to a different screen to then take care of the balance owed. We will discuss more on Accounting under the MEMBER tab. The second and third tabs give further details on EVENTS and COMMITTEES of the Association.



In the **CENTER Column** are items of general interest and LINKS to tools and sites you use in your everyday business. NOTIFICATIONS will display messages from the Association that are current and timely – it could be special holiday hours, links to voting on the election, a survey that is being done or the open house list for the next day. It will change regularly so it is important to always have a look to see if there is something new.



The **QUICK LINKS** section contains shortcuts to those sites that have been proven to be the most commonly accessed ones by the membership over time – they will change – for example – DOCUSIGN and SHOWINGTIME are being added to reflect their adoption and usage by the Association and members. Clicking on any of these links will open their affiliated site in a new tab.

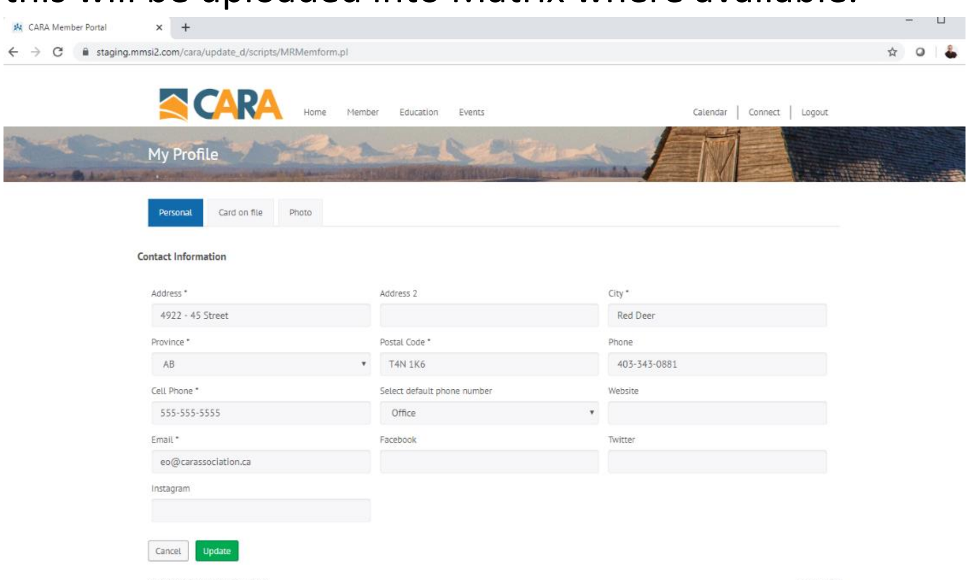
Lastly in the MIDDLE are the UPCOMING COURSES being hosted by the Association. This will show the next FIVE courses on the schedule – you can see the full syllabus by selecting ALL. More on that later.

<u>THE MEMBER PAGE</u>

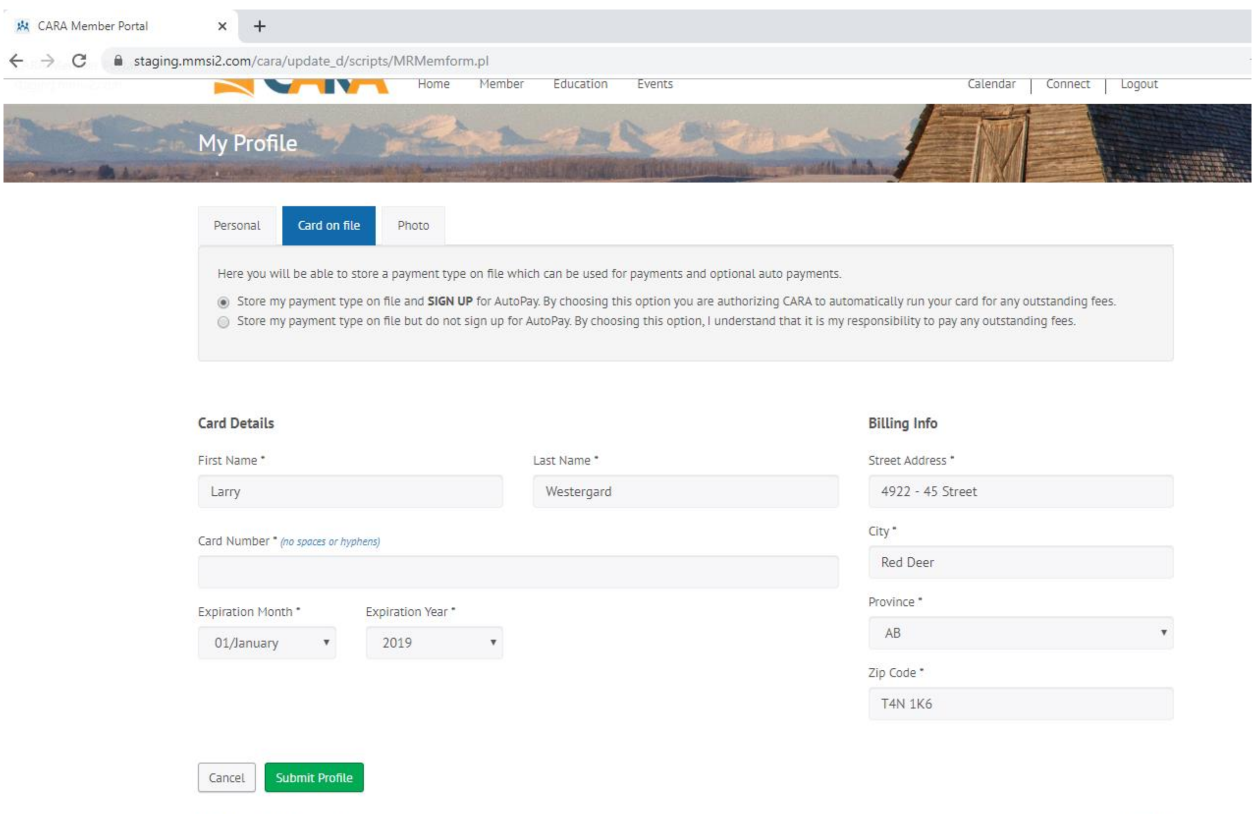
As we noted earlier, the MEMBER PAGE can be accessed from the Header and the RIGHT-HAND or the LEFT-HAND Columns in the middle section. From the Header, you have the option of either going to MY PROFILE or MY ASSOCIATION. Clicking on either EDIT PHOTO or Edit MY PROFILE on the Left-Hand column will take you directly to the MY PROFILE page.

MY PROFILE

There are three tabs on the page. The PERSONAL tab allows you to fill in your information. Note that the basic information is drawn for the data supplied on your office profile used at registration or transfer. CARA does not collect information related to your residential address, rather your OFFICE address and phone number are inputted instead. You can add additional information such as social media links et al and this will be uploaded into Matrix where available.



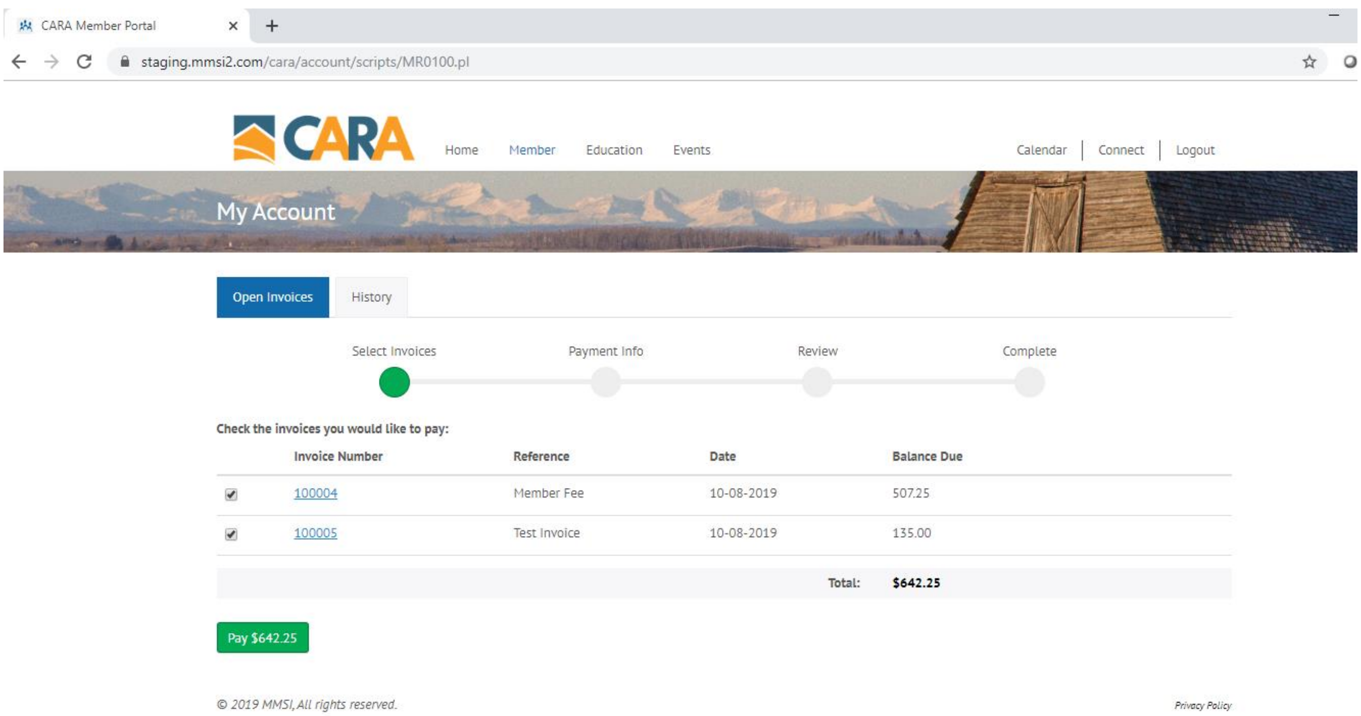
The second tab is CARD ON FILE. Here is where you would store the information needed to allow you to quickly make payments to your account. You can either activate AUTOPAY which will automatically take care of any balance on your account at the beginning of each month OR you can manually review and pay your outstanding balance every month. If you choose to not keep a card on file, the system will prompt you to enter a Credit Card when you checkout. A NOTE on Addresses…in this section you will have to PROVIDE THE ADDRESS THAT IS INDICATED AS THE BILLING ADDRESS of the card on file. This allows a proper authentication internally in the credit card system to help match number with address.



The third tab on this page is the PHOTO tab. As discussed earlier, this is where you can update the photo the system uses of you.

MY ASSOCIATION

The second option under the Member page or the direct link from the Account section on the Right-hand side of the Home Page is MY ACCOUNT. This page has two tabs, the first OPEN INVOICES lets you review the open invoices that are linked to you and then pay them online via credit card as previously discussed. You can click on the INVOICE NUMBER individually to review the details of each invoice number to see any individual charge on it.

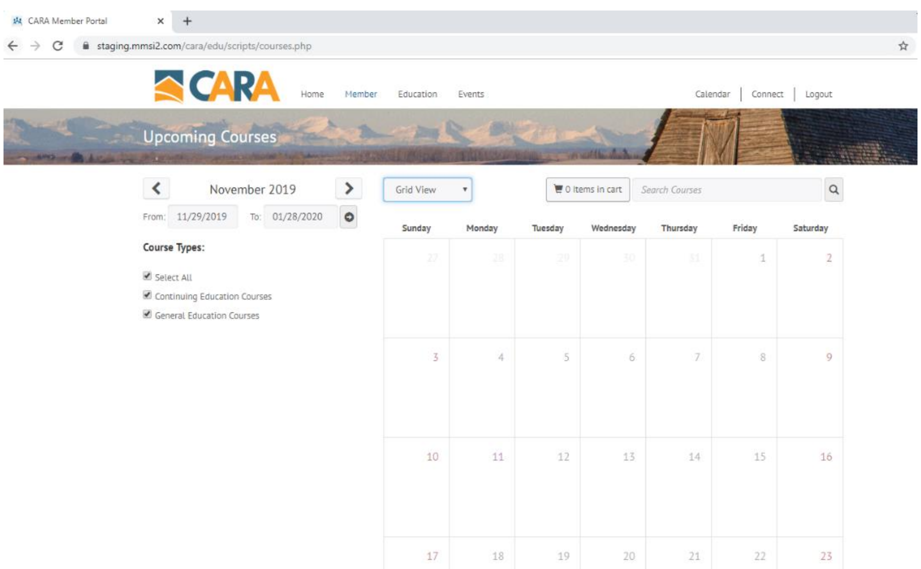


The GREEN PAY button will then begin the process of stepping you through clearing your Association balance.

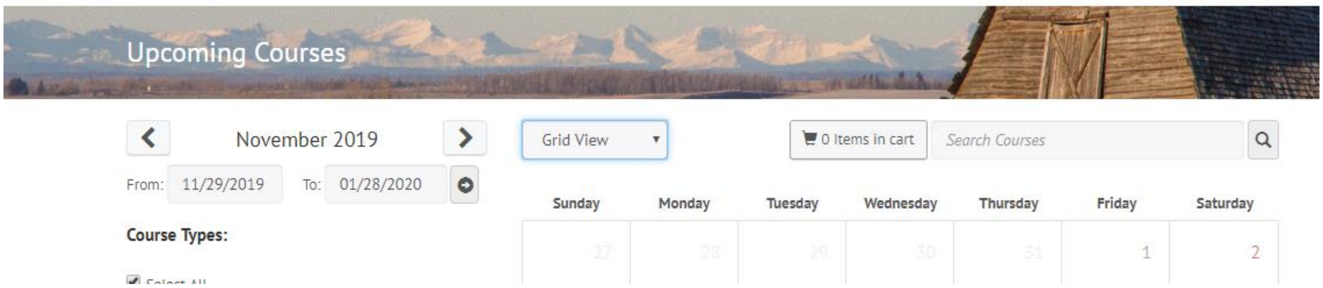
The second tab is HISTORY. This will provide you with a complete log of all the invoices attached to your profile organized by billing year. There will be a five-year history of invoicing contained in your profile. As in the previous section each invoice can be opened and read and printed. A great use for this could be to help a member prepare documents for your accountant!

The EDUCATION PAGE

There are two tabs under EDUCATION. The first is UPCOMING COURSES and it is here the Association will display all the courses that it has scheduled for the year. It is searchable by DATE and by TYPE. As more types are added they will appear along the Left-hand side. You can click the box to add or remove each course type in your search. You also can modify the DATE RANGE of courses you wish to search for. This can be done using the two FIELDS directly above the COURSE TYPE list. Lastly, in the UPPER MIDDLE of the page you can select to view courses in either a calendar view by selecting GRID VIEW, or a list view by selecting AGENDA VIEW. On the UPPER RIGHT-HAND SIDE is a SEARCH Bar that allows you to type in the name or partial name of a course as an ALTERNATIVE SEARCH method.



Once you find a course of interest you can select it which ADD IT TO YOUR CART. The box is located UPPER MIDDLE RIGHT and will keep a running total of all items that are in your Education cart that have not been checked out and thus NOT paid for/enrolled in. OF NOTE – even if there is NO CHARGE to a course and it is in your cart you MUST check out to link the course to your account and register for it. CLICKING ON THE CART will take you to CHECKOUT and allow you to finish the process by paying and registering for your course(s).



The second tab under Education is MY COURSES. This will give you an itemized list of ALL courses that you have taken that through the Association that are registered through the site. This list can be printed off if you need it for accreditation for a designation.

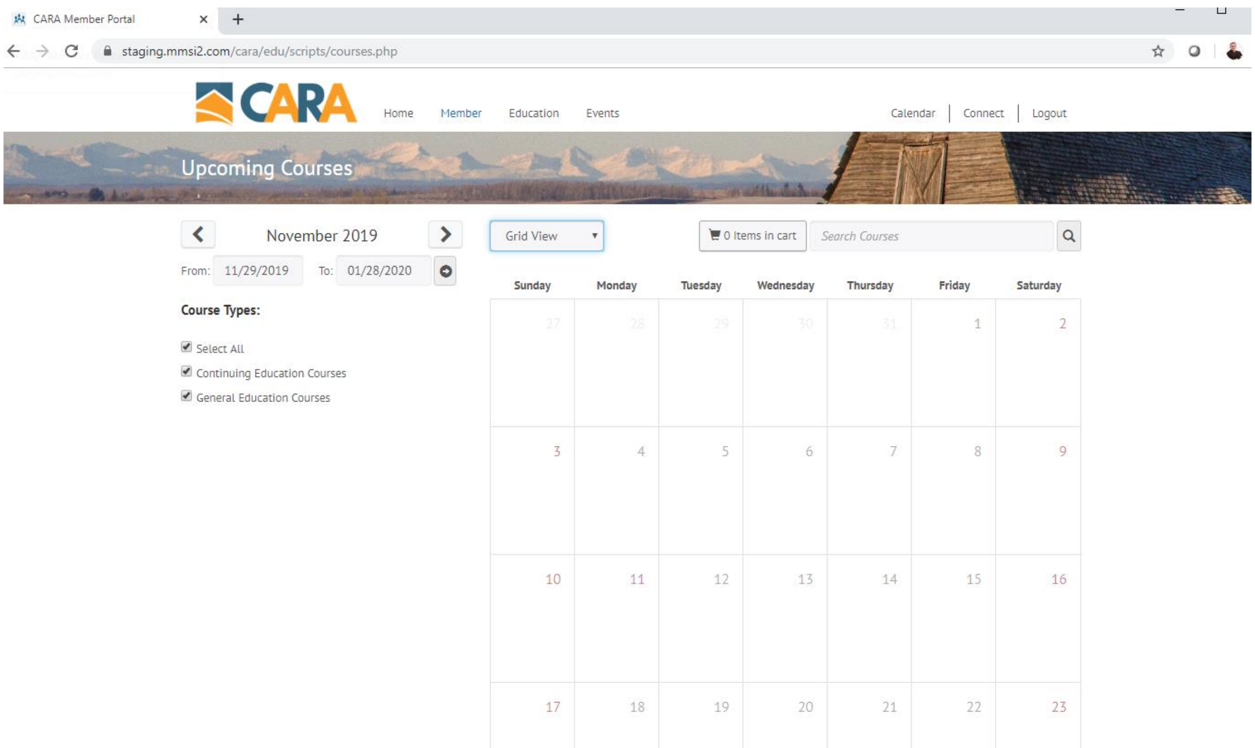
UPDATED – The AGENDA or List view will be disabled, and the GRID or Calendar view will be the ONLY option present.

A NOTE: The Education and Events pages have separate CARTS. Behind the scenes they are linked to different places in the accounting system so you MUST check out both carts separately if you have items in both. **<u>If you haven't checked out your cart you haven't finished registering.</u>**

CENTRAL ALBERTA REALTORS® ASSOCIATION

THE EVENTS PAGE

Like the Education page, there are two tabs here. The first, UPCOMING EVENTS will bring up all the events that have been announced and posted by the Association. It is also SEARCHABLE by DATE and by KEYWORD and can also be viewed through either an AGENDA or GRID view. It also has a CART that operates in the same fashion as the Education page. **Events that you select and place in the cart MUST BE CHECKED OUT before you are fully registered for them.**

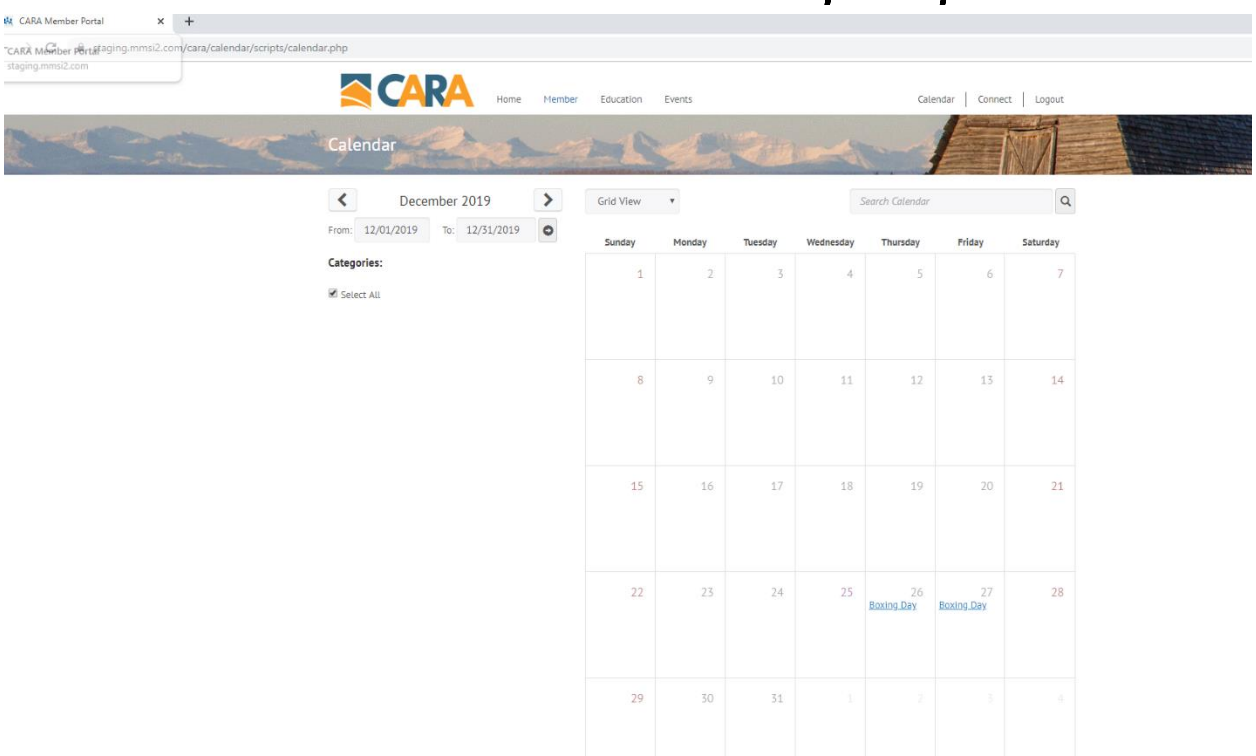


UPDATED – The AGENDA or List view will be disabled, and the GRID or Calendar view will be the ONLY option present.

CALENDAR

The Calendar is located along the upper right-hand side. It will show any date the Association has indicated has significance or interest to the members. It can be searched, again by either date range or keyword. And can be viewed in both AGENDA AND GRID VIEW.

UPDATED – The AGENDA or List view will be disabled, and the GRID or Calendar view will be the ONLY option present.



CONNECT

Located on the upper right-hand side of the header, the CONNECT button allows you to search the roster by AFFILIATE, MEMBER, or OFFICE. It will display the results based on the search fields filled in. Unfortunately, at this time it is a STATIC search, but we hope at a later date to make it so that you can from smart devices you can jump right into a contacting the subject of your search right form results page.