


Listing Bridge: How to Import Listing Data from Transaction Desk into Matrix

Save yourself and/or your office Admin time by using the **Upload Listing** button in Instanet (AKA Listing Bridge). Once you have all required fields filled out in the Property Data Input Form, with the click of a button, you can transfer all of the information into Matrix as an **incomplete** listing. Only the Residential Input Form has the button. You do not need listing input rights to upload the listing into Matrix as **Incomplete**. Use the steps below to see how it works.

IF THE TRANSACTION IS ALREADY CREATED, START HERE


1. Locate the transaction in Transaction Desk using the **Transactions** widget on the Agent Dashboard, or click the house icon in left side menu to access the Transaction Desk. Click the name of the transaction to open it.
2. Once the transaction is open, click **Forms** in the right side menu.
3. Click on the Data Input Form in the Forms section of the transaction to access it.
4. Verify all required fields have been filled out and locate the **Upload Listing** button  **Upload Listing** to the far right in the menu bar above the Data Input Form **NOTE: All required fields must be filled out in the Data Input Form in order for this step to work. If you are missing any required fields, you will be alerted of which fields need to be completed before the upload will work.**
5. Once you click the **Upload Listing** button, a window will appear with the ML# for the **incomplete** listing in Matrix. **The button should only be used one time because each time it is used it will create another incomplete listing in Matrix.** A red message will appear stating this.
6. If you have listing input rights, you can retrieve the incomplete listing in Matrix and make it Active. If you do not have input rights, inform your office Admin that the listing is ready to be submitted as Active in Matrix.

IF THE TRANSACTION IS NOT ALREADY CREATED, START HERE

To import the listing information from Transaction Desk, it is best to create a transaction. Currently the WMLS only offers Listing Bridge for Residential listings and therefore it is best to create a transaction so all forms and documents are in one place. To create the transaction, follow the steps below.


Option 1: Use the **Create Transaction** blue widget on the Agent Dashboard.



Option 2: Click the house icon  on the left side menu and click the **Add+** button in the upper right-hand corner.



1. The **Name** field is the only required field. WMLS recommends using the address of the listing or the client's name so that it is easily identifiable to you. The remaining fields **Template, Type, Import Data (Should ALWAYS BE "NO"),** and **Add me as the** are op-tional, but you may find them helpful. The **Use Wizard** box will guide you through five steps to create the transaction. Some find this helpful, but it is optional to use. Even if you do not have the box checked, you will still have a wizard once you create the transaction.
2. Once you at least have the **Name** filled out, click the blue **Create** button. If you kept the *Use Wizard* box checked, Step 4 is where you will add the Residential Input Form. If you do not keep the box checked, you will click **Forms** using the wizard in the right side menu.

IF THE TRANSACTION IS NOT ALREADY CREATED continued

3. When on the **Forms** section of the transaction, click the **Add +** button and find the WMLS Residential input form. Click the empty circle to the right of the form, and then the blue **Add +** button.
4. Fill out the required fields in the Data Input Form. Locate the **Upload Listing** button  **Upload Listing** to the far right in the menu bar above the Data Input Form. **NOTE:** All required fields must be filled out in the Data Input Form in order for this step to work. If you are missing any required fields, you will be alerted of which fields need to be completed before the upload will work.
5. Once you click the **Upload Listing** button, a window will appear with the ML# for the **incomplete** listing in Matrix. The button should only be used **one time** because each time it is used it will create another incomplete listing in Matrix. A red message will appear stating this.
6. If you have listing input rights, you can retrieve the incomplete listing in Matrix and make it Active. If you do not have input rights, inform your office Admin that the listing is ready to be submitted as Active in Matrix.

HOW TO MAKE THE INCOMPLETE LISTING ACTIVE

****Only the office Admin and/or Agent with listing input rights can submit Incomplete listings as Active in Matrix. The following steps only apply to those with listing input rights.****

1. Once in Matrix, there are two places to access Incomplete listings: the **My Listings** widget on the homepage or the **Input** tab in the top menu.
2. Click the *My Incomplete Listings* link, or *My Office Incomplete Listings* link, or *My Firm Incomplete Listings* link in the My Listing widget to find and select the appropriate listing. If using the Input tab, select the **Incomplete listing** from the Quick Modify dropdown menu, or search by MLS#. An "I" in front of the listing indicates it is Incomplete.
3. After selecting the listing, click on the "Residential Input Form" link to access the listing data.
4. Review the information and make changes as needed. Admins should always verify changes with the Listing Agent. Click the **Validate** button at the bottom to verify all required fields have been completed.
5. After reviewing the information, if you are ready to make the listing Active, click the **Submit Listing** button at the bottom. If not ready to make the listing Active, click the **Save as Incomplete** button at the bottom. **NOTE:** The listing cannot be made Active before the List Date entered on the Input Form. If the List Date is a future date, the listing can be saved as Incomplete for up to 60 days. If the listing is not made Active within the 60 days it will be purged from the system.
6. Proceed to adding photos and managing supplements to the listing using the **Manage Photos** link/button or the **Manage Supplements** link/button. **TIP:** Photos and supplements can be added before the listing is made Active.