



RAHB Matrix 7.0 – Contacts and saved searches

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One of the first things you will want to do, after you've taken a look at your Matrix home page, is check your **contacts** and **saved searches**. These will be moved from Fusion and the regional Matrix system to the RAHB Matrix system.

If you have been using only Fusion for your searches and maintaining your contact list, it is especially important that you make sure all the information in your saved searches and contacts is correct because some of the fields in Fusion do not line up with fields in Matrix. If information is missing or incorrect, you will want to edit the information and save it. (When RAHB members first accessed the regional system, all saved searches were moved over to the regional system. If you haven't turned on those searches and have continued to use your Fusion saved searches, then those searches in the regional system will still be there, and will be moved over.)

How to find and update your contacts

You will find all your contacts in *My Matrix* tab

- Click on *My Matrix*, then *Contacts*
- Check all your contacts' information, and click on *Save* for each one
- You will also use this tab to add new contacts

How to find and update your saved searches

You will find your saved searches in the *Saved Searches* drop-down menu under the *My Matrix* tab. All of your auto emails from Fusion will be imported as saved searches, and will remain in *Saved Searches* until they are saved as auto emails and turned *ON*. (When you turn on an auto email in Matrix, you must also turn *OFF* the auto email in Fusion, or your customers will receive a notification from both systems.)

All your searches will have a notation of *(REG)* or *(REG)(Imported)* before the name of the search:

- *(REG)* mean this search originated in the regional Matrix system
- *(REG)(Imported)* means this search originated in Fusion.

Check each saved search carefully to make sure all the search criteria is still correct. If information is missing or incorrect, edit/update the criteria for each search and save it.

Edit and turn on your saved searches in Matrix:

- Click on *My Matrix*, then *Saved Searches* to view your saved searches
- Click on a saved search (use the arrow to the left of the name of click on the name of the search)
- Check the criteria (use the *Criteria* tab), and when you are finished, click the *Save* button at the bottom.

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- You will be shown the *Settings* window, where you can either click on the “*Turn this Saved Search into an auto email*” line (and then follow the instructions in the next window) or, if you just want to save the search, click *Save* at the bottom of the *Settings* window.

Connect Saved Searches to Contacts

You can also connect a saved search to a client after you have checked and saved a saved search but haven't yet turned it into an auto email:

- Click on *My Matrix*, then *Saved Searches* to view your saved searches
- Click on a *save search* (use the arrow to the left of the name and click on the name of the search)
- Click on *Settings*.
- Click on the *arrow* in the *Contact Box* to select the appropriate contact.
- Click on *Save*

This will now turn this search into an auto email for this contact.

Turn off your saved searches in Fusion

- In your saved search manager, click on *Yes* on an active search
- In the *Search Settings* window, click on *Notification Settings*
- In the new *Search Settings* window, un-check the box for *Turn on auto-notification for this search*. Your notification will no longer be saved.



NOTE: If you do not edit your saved searches in Matrix, they will be updated, if needed, at cutover and will need to be checked and edited at that time. Any new *Saved Searches* you add in Fusion between now and the August 15 final cutover will be added to Matrix at cutover (and will have to be checked at that time for accuracy).



NOTE: If you edit *Saved Searches* in Matrix during the preview period, that particular *Saved Search* will not be updated at cutover. It will be assumed that the data in Matrix is up-to-date and should not be overwritten by what is in Fusion.