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## Contacts

The Contacts section contains functions relating to your communication with your clients. It is comprised of six components: Contact Management, Contact Summary, Presentation, Reverse Prospecting, Automatic E-Mails, and My Sent E-Mails. The Contacts function can be accessed from the menu or by clicking on the **Contacts** header from the dashboard.

### CONTACT MANAGEMENT

To access Contact Management, click on the link under Contacts on the menu. This will bring up a list of available Contacts. From this screen you may add, edit, and remove any saved Contacts.

The screenshot displays the 'Contact Management' interface. At the top, there are navigation options: Calendar, Add Contact, Print, and Advanced. Below this is a 'Quick Add' section with input fields for First Name, Last Name, and E-mail, along with a Portal and Add button. A search bar is located below the Quick Add section. The main area shows a table of contacts with columns for Name, Portal, Phone, and E-mail. A tip box is overlaid on the table, stating: 'Tip: Click to hide the Quick Add bar. Use the Advanced menu to restore or hide the Quick Add Bar.' Below the table, a detailed view for 'Exemplar, Dean & Sherry' is shown. This view includes a search bar, a tip box stating: 'Tip: You may delete multiple contacts at once by holding down the control key while using your mouse to select the contacts, then clicking Remove Contacts.', and various contact details such as Primary, Home, and Office phone numbers, Reverse Prospecting status (Enabled), E-mail Activity, Total Activity, and Assistant name (Emily). At the bottom, there are buttons for Edit Contact, Remove, Deactivate, and Transfer.

Name	Portal	Phone	E-mail
Hernandez, Elizabeth	ON		
Exemplar, Dean & Sherry	ON	(555) 285-0928	
Kilwein, Greg	ON		
Doe, Jane	ON	(555) 555-5510	Jane@janedoe.com
Example, Jane	ON	701-555-5235	Jane@example.com
Doe, John	ON	(555) 555-5550	johndoe1@msn.com
Public John Q	ON		in@example.com

**Tip:** Click to hide the Quick Add bar. Use the Advanced menu to restore or hide the Quick Add Bar.

**Tip:** You may delete multiple contacts at once by holding down the control key while using your mouse to select the contacts, then clicking **Remove Contacts**.

**Group:** Buyer Prospects

**Home:**  
**Office:**

**Reverse Prospecting:** Enabled

**E-mail Activity:** Auto: 1, Manual: 1, Viewed: 0

**Total Activity:** Auto: 1, Manual: 1, Viewed: 0

**Assistant:** Emily

**Buttons:** Edit Contact, Remove, Deactivate, Transfer

### Contact Management Tabs

Click on any Contact name to reach a tabbed interface where you may view and edit information about your contact.

#### ▪ Contact Information

The Contact tab contains all the information currently entered for the Contact. This tab includes the Contact's full name, phone numbers, addresses, and group information. To edit any Contact information, click on the **Edit Contact** button at the bottom of the screen.

Any additional information about the Contact may be entered through this screen.



Click **Remove** to permanently remove a contact, and if you choose, remove any associated saved searches and automatic e-mail events. It is important to note that removing a saved search removes it from the system entirely – if the search is attached to other contacts as well, it will be removed from their profiles and portals as well.

Click **Deactivate** to temporarily suspend automatic e-mails and suspend access to the customer portal. The automatic e-mail settings will remain in the system, but the contact’s e-mail address will be removed so that e-mails are no longer sent. To reinstate the e-mail, click on the automatic e-mail name, add the contact’s e-mail address to the recipient list again. When portal access is deactivated, the contact will no longer have the ability to log into the portal. All information (Favorites, Possibilities, Rejects, and all messages) will remain accessible to you, and to reinstate portal access, click **On** on the Portal tab of Contact Management.

Click **Transfer** to transfer the contact to another member from within your office. This will transfer all contact information, a copy of attached saved searches, automatic e-mails as currently configured, messages, active links, notes, and the customer portal with all associated activity. Begin typing a member name to locate the member of your office to whom you would like to transfer the contact.

The screenshot shows a contact profile for 'Dean Exemplar' with the following details:

- Name:** Exemplar, Dean & Sherry
- Email:** dns@example.com
- Group:** Buyer Prospects
- Primary:** (555) 285-0928
- Home:** (555) 201-1990
- Office:**
- Fax:**
- Mobile:**
- Other:**
- Pager:**
- Home:**
- Office:**
- Reverse Prospecting:** Enabled
- E-mail Activity:** Auto: 0, Manual: 0, Viewed: 0
- Total Activity:** Auto: 0, Manual: 0, Viewed: 0
- Assistant:** Emily

At the bottom, there are action buttons: Edit Contact, Remove, Deactivate, and Transfer.

▪ **Searches/Auto E-Mail**

The screenshot shows the 'Searches/Auto E-Mail' interface with the following sections:

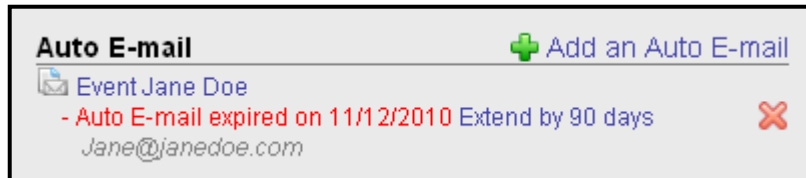
- Searches:** A list containing '4 Bedroom with Acreage' and 'Newer Construction'.
- Results:** A list of actions: 'View all', 'View new in the last 24 hours', 'View new since 03/23/2012 11:49 PM', and 'Reset time and view new since 03/23/2012 11:49 PM'.
- Auto E-mail:** A section with an 'Add an Auto E-mail' button and a list item 'Event Exemplar, Dean' with email 'dns@example.com'.
- Search Parameters:** A text area containing: 'Property type Residential; Status of 'Active','duclose upon other sale','duContinue to Show','duContinue to take offers','duYes - No Show'; New results include new listings, back on market, price changes, and reversals.'

At the bottom left, there are buttons for 'Add', 'Rename', 'Edit', and 'Remove'. Below the searches list, there is a 'View' section with 'Auto Email View'.



Using the Searches/Auto E-Mail tab, you may add, edit, and remove Saved Searches and Automatic E-Mail events. Click on the **Add** button to bring up a pop-up window with a list of saved searches. Choose one or more searches from the list, or create a new search by clicking **Create New Search**. Click **Attach Saved Search(es)** to save and return to the Searches/Auto E-Mail page. To remove a search from a Contact, choose the search from the list and click the **Remove** button. You may also edit a saved search using the **Edit** button.

Select a search from the Searches list to view its parameters and matching listings. You may view all results, new results from the last 24 hours, or results since you last reset the search time by clicking on the links at the right side of the screen. Click the **Reset time and View New Since** button to update the “View new since” time to the current date and time.



You may add an Auto E-Mail event to a selected search by clicking **Add an Auto E-Mail**. You will then have the opportunity to define the Auto E-

Mail properties. You may also edit an existing Auto E-Mail event by clicking on the name of the event, or remove an event by clicking the red X next to the event name. Any event that your Contact has selected to opt out of will be indicated here, along with a link to allow you to opt in the Contact again if necessary. The saved searches that display on this tab will automatically appear on the portal for this contact, if you have set up a portal.

Automatic e-mails will check for new matches to your search and send out those matches each day. The e-mails will continue as long as the recipient is viewing the results, or you may suspend the e-mail at any time. If a recipient has not clicked on an automatic e-mail in ninety days, the e-mail will become inactive, and you will receive notification. A link will appear in Contact Management and on the Contact Summary page where you can extend the automatic e-mail.

#### ▪ Portal

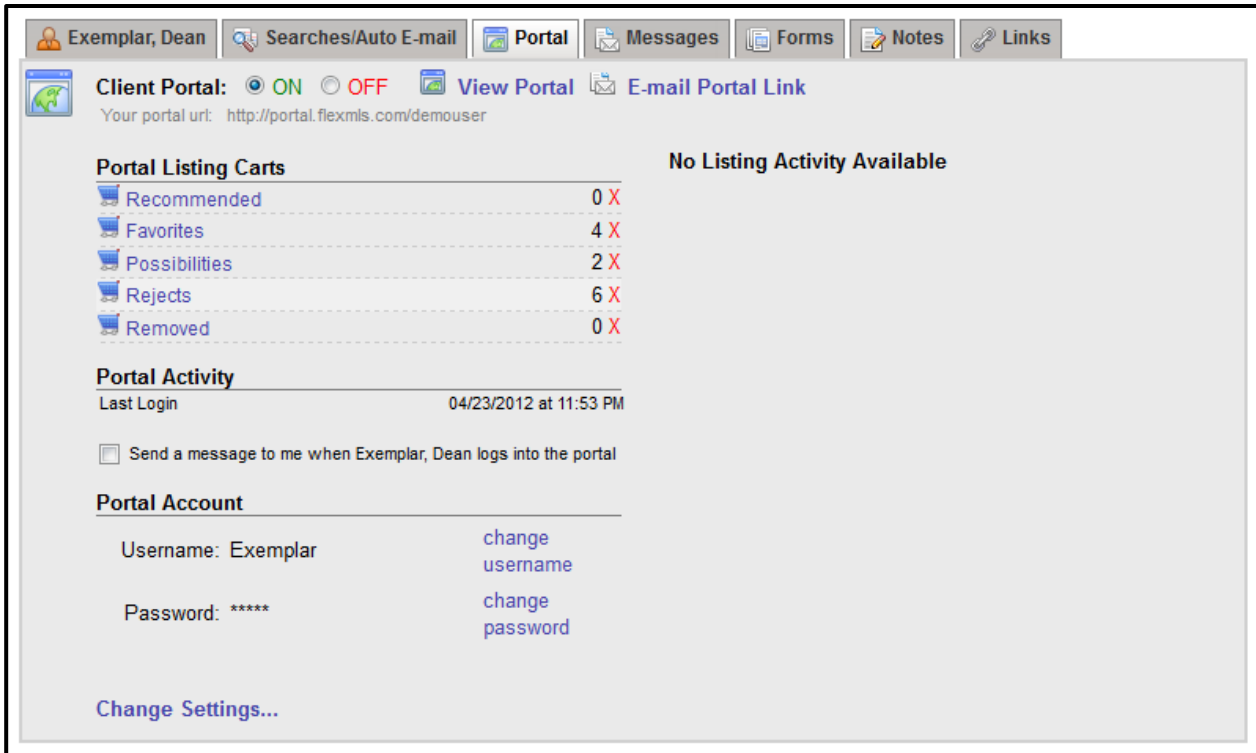
On the Portal tab, view the portal settings for the selected contact. If you have not enabled the client portal for the selected contact, begin by setting up a Username and password. You may type a password or use the link marked **Generate password**. Click **Create Account** to finish.

 A screenshot of the 'Portal Account' creation form. It includes a globe icon in the top left. The form has three input fields: 'Username' (containing 'Jane Example'), 'Password', and 'Confirm'. To the right of the Password field is a blue link 'generate password'. Below the input fields is a green 'Create account' button and a checked checkbox labeled 'Send Notification'.

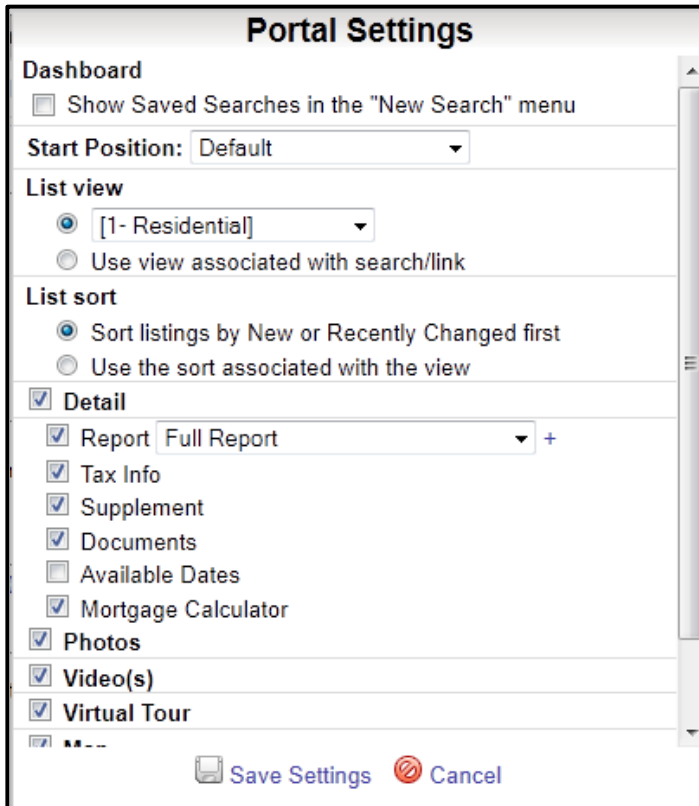
Once the portal user has been created, you can set individual portal preferences from this page. For further information on your default portal preferences, please refer to the Preferences portion of the manual.

By default, the Send Notification option is marked, and it will send an e-mail to your contact when you have clicked **Create Account**. To send an e-mail to your contact inviting them to the portal at any other time, click **E-mail Portal Link**. You may modify the default subject and message, and choose if you would like to include the contact's username. You may automatically generate a password for the client and have that new password included in the message as well.





When your contact has used the portal, the portal tab is where you will view information about the listings that have been marked as favorites, possibilities, and rejects. Click on the links to view the corresponding listings in each cart. If you need to make a change to the listings that are contained in any of the carts, you may do so by clicking on the cart name, and making changes to the preference markings from there. If you wish to clear all items from one of the carts, click on the red X next to the cart name to remove all listings from the cart. A confirmation screen will appear before the listings are permanently removed.









You can customize the information that is available on each client’s portal. By default, the customer portal uses the settings you have specified on the Portal Preferences page, accessible under Preferences on the menu. To change the settings for the selected client, click **Change Settings**. On the Portal Settings panel, make your selections and click **Save Settings** to apply the change.

▪ **Recommendations**





When viewing the contents of a listing cart for a contact or the search results of a search attached to the contact, you may mark listings as recommended. Click the star next to the smiley face icons to mark a listing as recommended. Once you have marked listings as recommended, a















new cart will be generated for that contact. You can review your recommendations on the portal tab for the selected contact under Portal Listing Carts, and your contact will see the Recommended cart on the portal dashboard.



Search Results for **Beth Hernandez**      


1 | [List](#) | [Detail](#) | [Photos](#) | [Map](#) | [Compare](#)

Cart: 5 Selected: 0     - 10 + Sort View [1- Residential]

	Price	Status	MLS #	Added	List Price	Total SqFt.	Total Bedrooms	Total Bathrooms	Current Price	Year Built
1 	\$234,000	    		12/02/2011	234,000	2,500	4	2	234,000	
	1220 12 Av N Fargo, ND 58102 Active / 00-1357									
2 	\$208,500	    		01/21/2011	208,500	1,700	2	2	208,500	
	4401 SPRUCE LANE Dawson, MN 31742 Active / 10-60									

To preview your portal, click **View Portal**. This link provides you with an agent-side version of what your client would see. If you need to make changes to the information that appears on your portal, return to the contact management page. For example, use the panel at the right side of the Portal tab to set what tabs of the search results screen are visible on the portal, or use the Links tab to remove any unneeded links from the Portal.

Customer Portal for Elizabeth Hernandez  [Log Off](#)  [Help](#)



**Tiffany Bloom**  
R. Bloom and Company Realty

Fargo, ND 58104  
484-523-0731  
E-Mail  
[Web Site](#)

**Searches and Reports**

Provided Searches

\$200-300K 3 bed  
Colonial 3BR 2BA

New Listing! 2 New or Changed

New Listing! 10 New or Changed

New Listing! 12 New or Changed

New Listing! 2 New or Changed

Reports

No reports are available

**Carts**


Recommended 2 Listings

Favorites 3 Listings

Possibilities 3 Listings


Rejects 1 Changed in 28 Listings

Removed 0 Listings

**Messages** [Notification Options](#) 

Messages are not visible while viewing the portal through contact management.

**Profile**

**Contact Information** 

Elizabeth Hernandez  
2644 135th St  
#202  
Riverdale MN 68421

[Change My Password](#)

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▪ **Messages**

The messages tab displays all messages that you have sent to and received from the selected contact. Click to expand a message, or click on a plus sign to expand a full message thread. Reply to messages from your clients, or send follow-up messages from this tab.

Exemplar, Dean | [Searches/Auto E-mail](#) | [Portal](#) | [Messages](#) | [Forms](#) | [Notes](#) | [Links](#)

**Contact Messages:**

Send a message to me when Exemplar, Dean logs into the portal [Write a message to Dean & Sherry Exemplar](#)

[Expand all messages](#) | [Collapse all messages](#) | [Search messages](#)

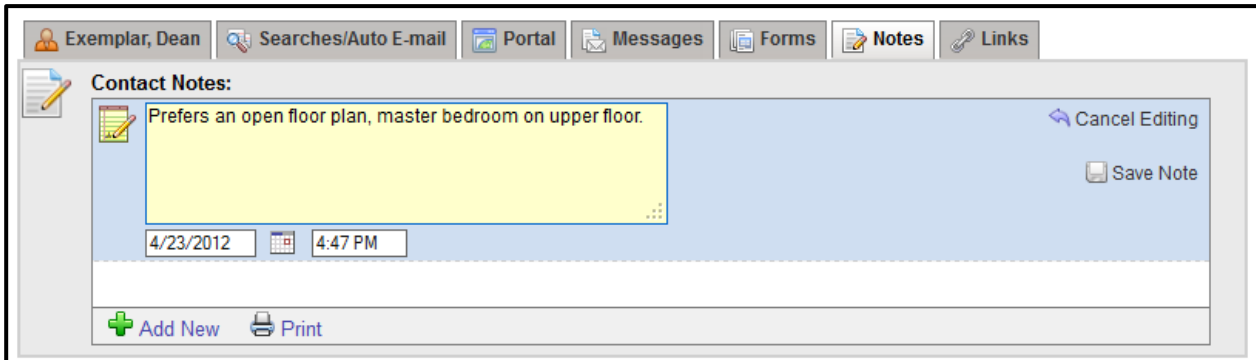
Showings To: Dean & Sherry Exemplar 04/23/2012

I'll pick you up at 9 am tomorrow for our showings.

[Send follow-up message](#) | Dean & Sherry Exemplar, (555) 285-0928, dns@example.com [Remove the message above](#)

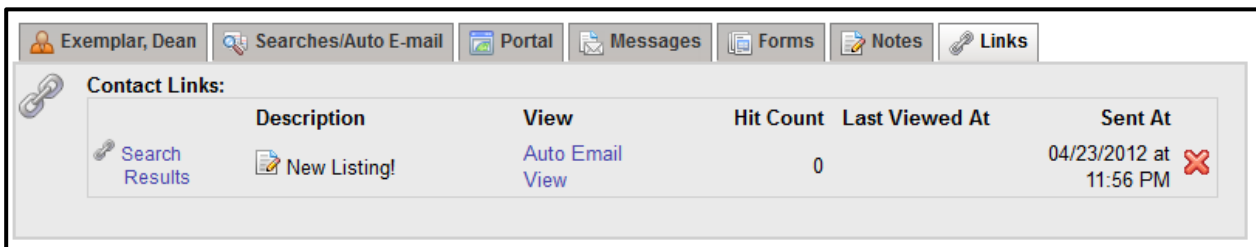


- **Forms** – If your MLS has forms access, the Forms tab lists all forms associated with the current Contact.
- **Notes** – On the Notes tab, enter notes about your contact. The notes will automatically have a time and date stamp applied and will be retained in reverse chronological order for your reference. You may edit or remove any note by clicking on the note to select it, then making your changes.



▪ **Links**

On the links tab, view all active links for the selected Contact. Click on the name of a link to view its contents. In the description column, view or modify the description of the link that appears on the client portal. For example, a link with a subject Search Results may have a description of 3-Bedroom, 3-Bath in Centennial School District. These links display on the client portal, if you have enabled a portal for the selected contact. To remove these links from the client portal, click on the red X at the end of the row.



**Add Contacts**

**Quick Add:** First Name:  Last Name:  E-mail:   Portal

To quickly and easily add a contact, simply enter the contact’s name and e-mail address in the Quick Add bar, then click the **Add** button to save. All fields must contain information before the Quick Add Contact may be saved. You may choose to enable the client portal immediately by clicking the box marked **Portal**.

To add full contact information, including mailing address and detailed contact information, click **Add Contact**. You may enter multiple e-mail addresses by clicking the **Add** button next to the E-mail field. You may add your Contact to a group and choose whether to enable Reverse Prospecting from this screen.

**Groups**

Contacts may be associated with a group for better organization. To add a Contact to a group, click **Add** to bring up a drop-down list of available groups. Select the group to which you would like to add the Contact, and click **Save Changes** when all groups have been added.



Each contact may belong to multiple groups; simply click **Add** to choose additional groups. To remove a group name from a Contact, click the red X button next to the group name.

To add, edit, or remove a group from the Contact Information screen, click **Edit Group List**. The resulting window will list all available groups. To add a new group, click on the **Add New** button and type the name of the group into the Group Name field. Click **Save**. The new group name will now appear in the list of available groups. To edit the name of an existing group, click the **Edit Group** button and a field will appear allowing for a new group name to be entered. To remove any of the group names from the existing list, choose the name of the group from the list and click on the **Remove** button.

### Enable Reverse Prospecting

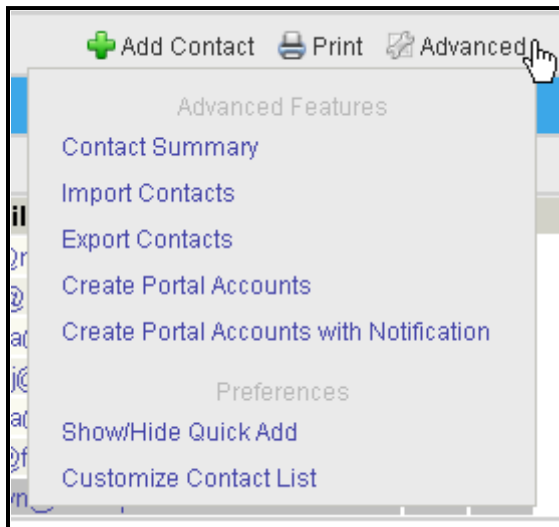
If you would like to have the searches related to this Contact used in Reverse Prospecting for the rest of the MLS, check the box for Reverse Prospecting. *Only your information will be revealed in the event of a Reverse Prospecting match, not the Contact's information.*

### Print

Click **Print** to print information for one or more Contacts. If no Contacts are selected, the print button will automatically print information for all Contacts.



### ADVANCED



The Advanced button includes the following options:


**Contact Summary** – The Contact Summary report displays activity for Portals, Messages, e-mails, and searches for each contact. This report is also accessible from the main Contacts menu.

**Import Contacts** - Click **Import Contacts** to upload an existing address book onto the flexmls system. Use the **Browse** button to locate your address book, select the delimiter used, then click **Upload File** to complete the transfer.

**Export Contacts** - You may export your contact information into a Comma Separated Values file. Choose your preferred method of opening the file, then click **OK** to proceed.

**Create Portal Accounts** – Click here to generate portal accounts for all contacts. Usernames and passwords will be created for each saved contact.

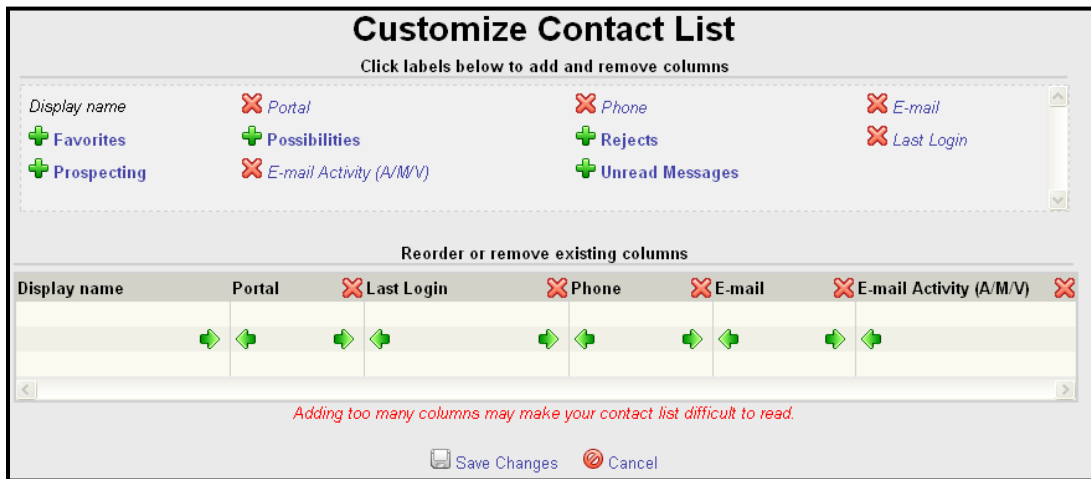
**Create Portal Accounts with Notification** – Click here to generate portal accounts for all contacts, and send e-mail notifications of the portal to all contacts. Usernames and passwords will be created for all saved contacts, and the default e-mail that you have set up in your portal preferences will be sent to all contacts.

**Show/Hide Quick Add** - Use this button to toggle between showing/hiding the Quick Add bar. You may also hide the Quick Add bar using the  icon at the right edge of the Quick Add bar.





## Customize Contact List –



Customize which columns appear in the contact list on the contact management page. You may choose to add columns regarding Portal activity for example, or e-mails. Columns that are not currently in use will display with a green plus sign next to them. Click the green plus sign to add the column. To remove a column from the contact list, click on the red x next to the column name. Below, click on the arrows to adjust the position of the column left or right. Please be aware, adding too many columns may make the contact list difficult to read, according to your screen size.

## CONTACT SUMMARY

The Contact Summary report is designed to give a quick, overall view of activity related to your Contacts in flexmls Web. You may choose to display all Contacts or any group of Contacts by using the drop-down list at the top of the screen. The resulting report will show you the display name, phone number, and information about portal activity, e-mails, and attached Searches. You may sort by any blue column header, so for example, by Display name, or the number of new Favorites marked on the customer Portal.

Contact Summary Report													Print	
Prepared Thursday, February 10, 2011 10:11 AM														
Show Contact Group: -- All Contacts --														
Display Name	Phone	Portal		Favorites	Possibilities	Rejects	Messages	Sent E-mail			Auto E-mail			
		Status	Last Login	New / Total	New / Total	New / Total	New / Total	Auto	Manual	Viewed	Saved Search	Opt	Status	
Allan Hill		ON	Never	0 / 0	0 / 0	0 / 0	1 / 1	0	0	0				
Amanda Hillen		ON	08/25/2010 at 12:36 PM	0 / 0	0 / 0	0 / 0	0 / 0	0	0	0	Moorhead Condos	In	Active	
Andrew Wang		ON	02/15/2011 at 08:54 PM	0 / 3	0 / 0	0 / 0	0 / 0	0	0	0				
Andy (fbs test)		ON	06/23/2010 at 12:44 AM	0 / 12	0 / 13	0 / 3	0 / 0	0	0	0	flexmls test (andy)	In	Expired	
Jane Smith		ON	04/10/2009 at 08:13 AM	0 / 6	0 / 21	0 / 151	0 / 2	0	0	0				

The Display Name is a hyperlink to the Edit Contact screen, or you may click on any the envelope icon to open your local e-mail client to send a message to that address. The Portal section of the report displays the status of the portal – whether the portal is turned on for each Contact. Next to that, the date and time that the Contact last logged into the portal will display, followed by columns to review the number of listings that have been marked as Favorites, Possibilities, and Rejects. In each of those columns, the number under **New** represents new activity in the last 72 hours.



The Sent E-mail section of the report contains information about your e-mail correspondence with your Contacts. The column marked **Auto** will reflect how many Automatic e-mails have been sent to the Contact in the last thirty days, **Manual** is the number of manual e-mails you have sent to this Contact in the last thirty days, and **Viewed** displays the number of times those links have been clicked on and viewed. Click on any number to view the listing content that was contained in the e-mails.

Any Saved Searches attached to a Contact appear as hyperlinks on this report. Click on a link to open the saved search and view and edit its criteria. If your MLS preferences allow contacts to opt out of e-mails, the Opted column will show whether a Contact is currently accepting messages generated from that search's e-mail event. If a Contact has opted out of an event by mistake, you may reactivate the event by clicking the **Opt In** link.

The Status column will show the current status of the e-mail event. If an automatic e-mail has expired, you can click on the Expired link to extend the e-mail for an additional 90 days.

## PRESENTATION

The flexmls™ Presentation allows you to bring together, in one place, different reports from flexmls Web for a more complete presentation to your clients. The editor is focused on presentations to sellers (a listing presentation) and allows you to combine a CMA, a closing cost estimate (CCE), as well as documents and web sites you've entered into your Profile.

First, name your presentation and select a Contact. In the upper left corner, you can name your presentation and select a Contact or add a new Contact for whom you are creating the presentation.

Next, add Content. The content for your presentation is listed in the frame on the right side of the screen under the Presentation Content tab. The Presentation includes default placeholders for a CMA and Closing Cost Estimate.

**My Presentation** For **Jane Seller** [New] [E-mail] [Preview] [Save]

Closing Cost Estimate  
Jane Seller [Edit CCE] [New]

**Closing Cost Estimate**

Name: \* Jane Seller

**Estimator Details**

Buyer:	Seller:
<b>Property Address:</b> 111 Mercury St Fargo, ND 58103	Contract Sales Price: \$0
	Contract Date: 07/26/2006
	Closing Date: 07/29/2006
	Property Tax: \$0 per year
	Special Assessments: \$0 per year
	Special Tax District: \$0 per year
	Homeowner Hazard Insurance: \$0 per year
	HOA Fee: \$0 per month

Summary of Buyer's Transaction		Summary of Seller's Transaction	
Gross Amount Due From Buyer		Gross Amount Due To Seller	
Contract sales price	\$199,800	Contract sales price	\$199,800
Personal property	\$10,000	Personal property	\$10,000
<b>Settlement charges (see form)</b>	\$3,957		
Gross Amount Due From Buyer	\$224,057	Gross Amount Due To Seller	\$220,100
Amounts Paid By Or In Behalf Of Buyer		Reductions In Amount Due To Seller	
Deposit or earnest money	\$1,500	Excess deposit	\$2,000
Principal amount of new loan(s)		<b>Settlement charges (see form)</b>	\$5,994
Existing loan(s) taken subject to		Existing loan(s) taken subject to	
		Payoff of first mortgage loan	
		Payoff of second mortgage loan	

**Presentation Content** [Print] [Help]

Closing Cost Estimate [X]  
CMA [X]  
Document [X]

Add new Document [Add]

**Demo Marketing3**  
PLEASANT APPR-INSP SV  
1333 MICHAEL CIRCLE  
TUPELO, MS 38801  
http://www.flexmls.com  
555-555-5555



## CMA

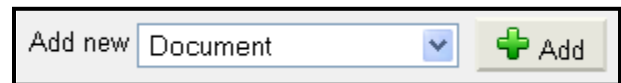
To add a CMA, select the **CMA** link on the Presentation tab. (It is selected by default.) In the left frame (the main window), you can either click on the blue drop-down arrow to select an existing CMA or you can click on the **New** button to start a new CMA. If you click the **New** button, you may do a full search to find comps, and then you will be given an opportunity to go directly into the CMA function. When you are finished, be sure to save your CMA.

## Closing Cost Estimate (CCE)

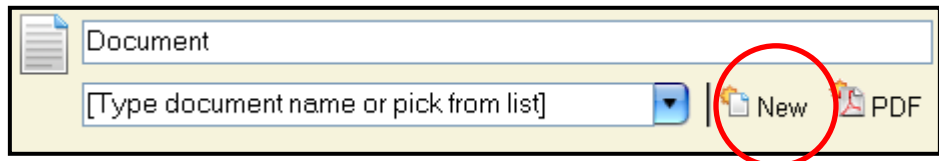
To add a Closing Cost Estimate, select the **Closing Cost Estimate** link on the Presentation tab. In the left frame (the main window), you can either click on the blue drop-down arrow to select an existing CCE or you can click on the **New** button to start a new CCE. If you create a new CCE, be sure to save it before proceeding.

## Documents

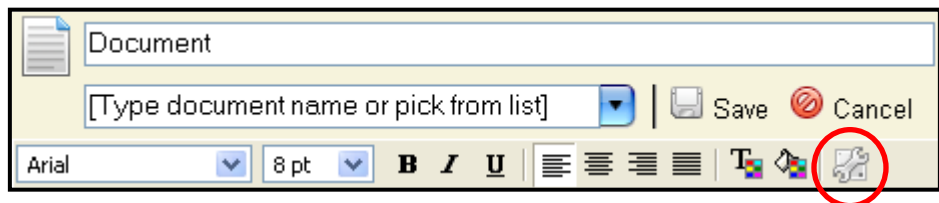
You can add a new document to your Presentation in the lower right corner of the editor (just above your profile) by selecting the "Document" type and clicking the **Add** button.



In the main frame, you'll now have the opportunity to either select an existing document or add a new document or PDF file.



To add a new document, click the **New** button and a light word processor will appear (Click the wrench icon to see a more advanced toolbar for the word processor) where you can enter and format your new document. When you are done creating your document, click the **Save** button. For example, you might like to add a personal or firm résumé, a marketing calendar, information about your approach to pricing and selling homes, or other key pieces for making your listing presentation.



- **Use the Same Documents for Multiple Presentations**

Once you create a personal or firm résumé and save it as a document, you can use it in multiple presentations simply by selecting it from the available documents.

- **Drag and Drop to Reorder Content**

To change the order of the Presentation, click on the content you want to move, hold down the mouse, and drag the content to the desired position in the Presentation.

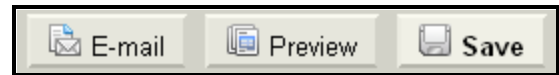


### ▪ Collapse Right Frame

If you need more space when creating your CMA or CCE, click on the border between the main and right frames and the right frame will collapse making the main frame larger.

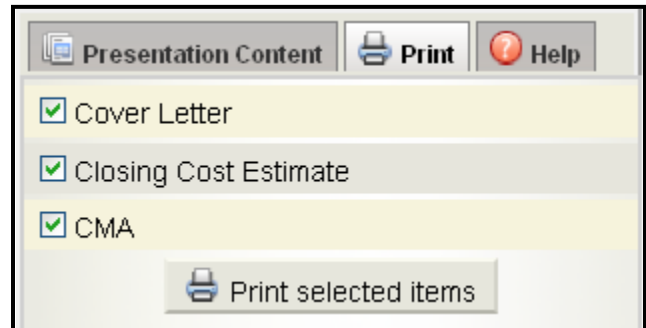
### E-Mail Presentation

The best way to show clients the Presentation is to e-mail it to them by clicking on the **E-mail** button in the upper right corner. Your clients will be sent a link that will open up the Presentation in their web browser. To see what your clients will see, click on the **Preview** button.



### Print Presentation

You can print the presentation using the Print tab next to the Presentation Content tab. Select the sections of the presentation you would like to print and click the print button. Please note, the print tab currently only displays the CMA, CCE and text documents loaded into the presentation. PDFs and other web sites are not printable along with this other content.



Before closing the Presentation editor, be sure to click the **Save** button in the upper right corner. If you created new content (a CMA, CCE, or document) through the Presentation editor, you also need to save each of those separately. The system is designed to prompt you to save all content, so please pay attention to the prompts.

## REVERSE PROSPECTING

The Reverse Prospecting module is designed to match potential buyers with your listings. The function starts by taking a particular listing and searching through all Saved Searches in the MLS that have Contact names attached to them to see if any of the searches match this listing. Once a match is returned, the name of the MLS member that has set up the search and Contact will be returned in the search results. The names of the Contacts themselves are not displayed.

Please note, the Reverse Prospecting function will only process searches with Contact names that have been specified in Contact Management to be eligible for Reverse Prospecting. This is done by each user on a per Contact basis. If you wish to have your Contact searches available for Reverse Prospecting, be sure that you have checked the **Enable Reverse Prospecting** box for each Contact name.

To run a Reverse Prospecting search, click on the **Reverse Prospecting** link under Contacts on the menu.

Select	List #	Status	Address			
<input checked="" type="checkbox"/>	06-812	Active	1212 WEST NORTHEASTERN WAY	Fargo	ND	
<input checked="" type="checkbox"/>	06-813	Active	2424 EAST SOUTHWESTERN BLVD	Fargo	ND	

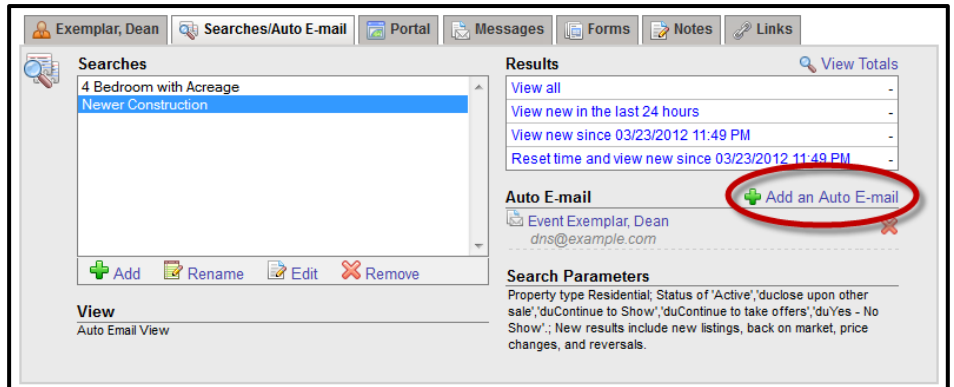
All listings under your control will appear. Check the listings for which you would like to have the system search for a matching Contact and click the Run Reverse Prospecting button to return matches. If there are any matches for those listings, the MLS members who entered in the search and Contact name will be returned as a match.



## AUTOMATIC E-MAILS

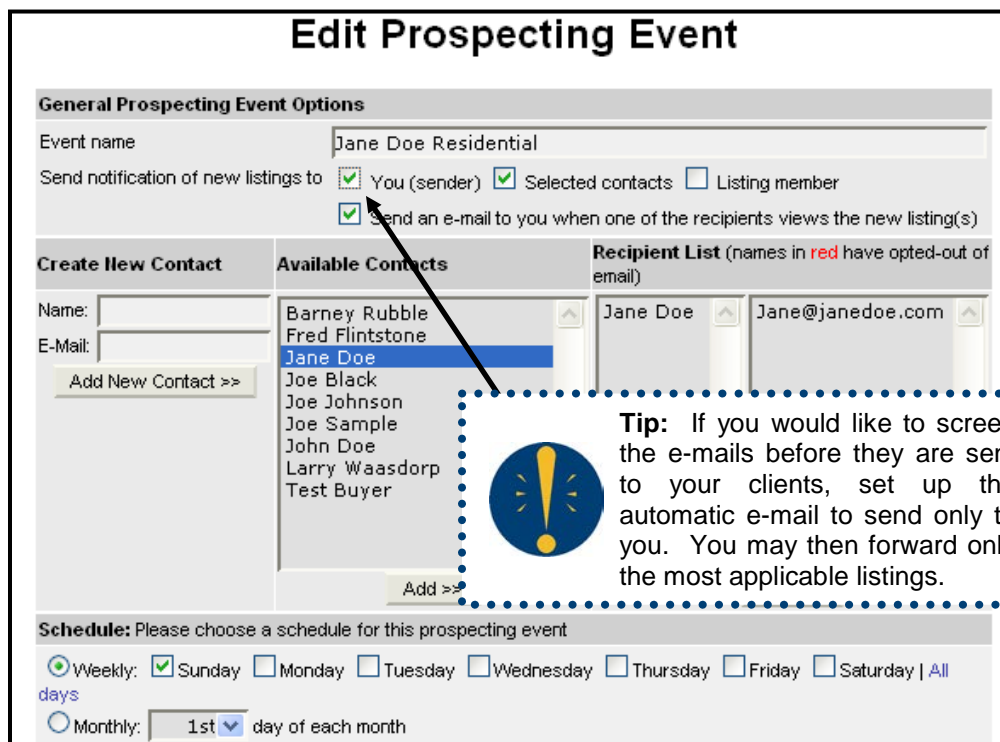
The Automatic E-mail function takes the concept of tracking matches to saved searches one step further. The system will automatically check for new matches to your search criteria and send out an e-mail to alert you to new matches.

In order to set up an E-mail Prospecting event, a saved search must be created. See the sections on Search Functions and Search Results for more information on saving searches. Once the search has been saved, you have several options on where to begin your automatic e-mail. First, on the Contact Management page, each contact has a tab marked Searches/Auto E-Mails. On this tab, click **Add an Auto E-mail** to set up an e-mail for the selected contact and Saved Search.



Or, you may click on **Automatic E-mails** under Contacts on the menu. A screen with a list of all your saved searches will appear. Choose the saved search that you want to use to set up an automatic e-mail and click **Edit**.

The Edit Prospecting Event screen appears. Begin by typing a name for the event. Typically, the name of a client and/or some description of the search are good event names.



Choose the contacts who will receive the e-mails automatically when new matches are entered into the system. You can choose to receive the e-mails yourself (recommended) as well as Selected Contacts (your clients), or the Listing Member. If you intend to proof the e-mails before forwarding to others, be sure to only check yourself on that list. Also, choose



whether you would like to receive an e-mail notification the first time a recipient clicks on the link to view the listings.

If you are sending to a Contact who is not already entered in your list of available contacts, you may enter their name and e-mail address in the fields on the left and click **Add New Contact**. The recipient will be added to the list on the right. If the Contact was previously attached through the searching function, their information will already appear in the recipient list. Any Contact who has opted-out of the Prospecting event will appear in red. To add a recipient from your list of Available Contacts, choose the name from the list in the middle and click **Add** at the bottom of the list.

**Schedule:** Please choose a schedule for this prospecting event

Weekly:  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday | [Clear days](#)  
 Monthly:  day of each month

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**View or report to send**

View (interactive)  
 Report (public)  (printer-friendly)  
  
 1- Residential:  
List Price, Total SqFt., Total Bedrooms, Total Bathrooms, Address, Current Price, Year Built

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**Web page personal message to recipient** [Edit Message](#)

Templates:   
 Preview: 

Brought to you by Demo User of Example Realty, Inc.

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**E-mail content**

Templates:

Subject:  New Listing!  
 Body:  Hello,  
 Spell Check

HTML   
 Text

Here are some new listings that meet your criteria.  
 Please let me know if you would like to view any of these listings and I will set up a showing to accommodate your schedule.  
 Thanks!  
 Include Signature:

-----  
 Tiffany Bloom  
 Fargo, ND 58104  
 Office Phone - (484) 523-0731  
 jmurray@fbsdata.com  
 http://www.flexmls.com  
 License # 3333  
 -----

Select the schedule for the Prospecting event. You decide what day(s) of the week or month the e-mail will be generated. By default, all days of the week are selected. Choose which Interactive View or Printer-Friendly Report you want to send to the client. A View is a specific set of columns of information that you can customize. Recipients receive the same columns of information that you see at the bottom of the selection box for the chosen View, along with the ability to click on any MLS number to view a summary or a public full listing report. For more information on customizing Views, see the Preferences section. For more information on customizing Reports, see the Custom Reports section.

Fill in the options for the web page message and the message that recipients will receive with the link for new matches. The messages you enter may be saved as templates for later use and selected from the drop-down lists below the headers for each message section. You may set specific default message templates, replace or rename existing templates, or delete

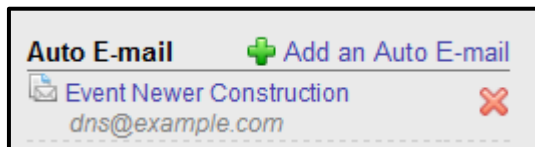


templates by clicking on the appropriate icon next to the drop-down lists. Your profile information will appear below the body of the e-mail message as a signature block if you click **Include Signature**.

### Remove a Prospecting Event

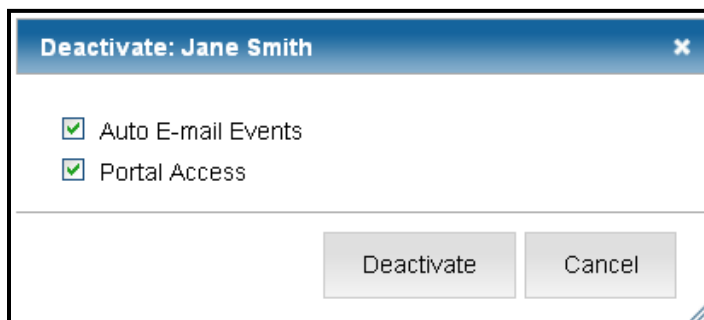
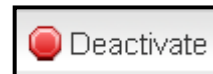
To permanently discontinue an automatic e-mail event, you must remove the Prospecting event for your client. To remove or edit any existing Prospecting event, click on **Automatic E-mails** under Contacts on the menu. Click on the search to which the e-mail event is attached and click the **Edit** button below. This brings up a screen with all events that are attached to the search. Choose the event that you are interested in. You have the option to click **Remove**, click **Edit** (which allows you to change any information related to the event), or click **Done** to go back to the main screen.

You may also remove the e-mail event from the Contact Management screen. To do so, click to select the contact from the list, then click on the Searches/Auto E-mail tab. On the right side of the screen, any automatic e-mail events will be listed under **Auto E-mail**. Click the red X next to the name of the automatic e-mail event you would like to remove from that contact.



### Deactivate a Prospecting Event

Under Contact Management, you have the option to deactivate automatic e-mails. This temporarily suspends the automatic e-mail, but allows you to preserve the settings and reactivate it at a later date.



## MY SENT E-MAILS

For a list of all e-mails that are created and sent from the system, the My Sent E-mails function is available under Contacts on the menu. This section keeps track of all e-mails sent from the system for up to 365 days.

View My Sent E-mails							Type to filter e-mails	Last 30 days ▾
Sent At ▾	Contact Name	E-mail	Last Viewed At	Hit Count	Content	Resend		
04/25/2012 01:44 PM	Local e-mail client	Local e-mail client	04/25/2012 01:44 PM	1	View	Send		
04/24/2012 02:14 PM	david@fbsdata.com	david@fbsdata.com	04/24/2012 02:20 PM	3	View	Send		
04/17/2012 03:41 PM	dylan@fbsdata.com	dylan@fbsdata.com	04/17/2012 03:42 PM	2	View	Send		

The My Sent E-mails log displays when the message was sent, the address it was sent to, and the last time the recipient viewed the message. It will also show the Hit Count, which is



the number of times the link has been viewed. Click on the **View** link to see the listing content of the e-mail, for those e-mails where the link is still active. Your personal messages are not retained in the system, only the listing information is archived for future reference. Only e-mails with active links will display information in the Last Viewed At, Hit Count, Content and Resend columns. If you sent a message to a contact who is not saved in the flexmls Contact Management system, that message will display only while the link is active (30 days).

### Resend

You may resend listing information for any active link by clicking the **Send** link in the Resend column. You will have the opportunity to compose a new e-mail message to accompany the page or report.

### Filter

To filter the e-mails by a Contact or e-mail address, type in the text box at the upper right corner of the page.



A rectangular filter box with a light blue border. On the left, there is a text input field containing the name "David". On the right, there is a dropdown menu with the text "Last 30 days" and a small downward-pointing triangle icon.

