



Preferences Table of Contents

My Profile	2
Quick Profile Maintenance	2
My Names	3
My Addresses	3
My E-Mail Addresses	4
Personal Photo and Logo Maintenance	4
My Documents	6
My Phone Numbers.....	6
My Web Addresses	6
Change My Password	7
General Preferences.....	7
Preferences:.....	7
My Views	9
General	9
Fields.....	9
Sort.....	10
Save	10
My Saved Sorts.....	10
My Map Overlays	11
My Reports	14
My Quick Searches.....	14
My Exports	15
Portal Preferences.....	16
Portal Name	16
Portal Signup.....	16
E-Mail Greeting	16
Portal Preferences.....	16
Default Map	17



PREFERENCES

flexmls Web has many features which you may customize to your needs using your Preferences. In this section, you set up your contact information and personalize how information is presented to you on many pages throughout flexmls Web.

MY PROFILE

The **My Profile** page contains fundamental information about you, the user of flexmls Web. The more complete and up-to-date your profile information, the better the system will work for you.


In your profile, you may customize your password, add personal photos and logos, and ensure that your contact information is correct so that your clients may keep in touch with you.

Quick Profile Maintenance









Clicking on **Quick Profile Maintenance** will bring up a form with all your primary contact information. The primary information is that which you determine to be the default. For example, you may add in multiple e-mail addresses for yourself, but your primary e-mail address will be the one to receive all responses.

My Profile

flexmls Web Demonstration Database
Demo User


Quick Profile Maintenance

Choose what part of your profile you wish to edit:

 My Names	 My Documents
 My Addresses	 My Phone Numbers
 My E-Mail Addresses	 My Web Addresses
 Personal Photo and Logo Maintenance	 Change My Password

Quick Profile Maintenance

General Information

First name	Demo	
Middle name		
Last name	User	

Marketing Information

Marketing Name	<input type="text" value="Demo User"/>	
----------------	--	--

Designations

Available		Selected
Accomplishments (1239)		Broker (BR)
Broker (BR)	Add >>	
CRS (CRS)		
GRI test (GRI)		

Display Options

Default Listing Name:	<input type="text" value="System Name"/>	<input type="checkbox"/>	Include Designation
Default Footer Name:	<input type="text" value="System Name"/>	<input type="checkbox"/>	Include Designation

You may add or edit your system name, marketing name, and designations that appear in materials created with the system from this screen. You may also set the defaults for the name that will appear within listings and the “prepared by” information on page footers. This information may be edited by clicking on **My Names** from the My Profile screen as well. Be sure to click **Next** to save your information.



My Names

You may add or edit your system name, marketing name, and designations that appear in materials created from the system from this screen (where applicable, according to MLS preferences). You may also set the defaults for the name that will appear within listings and the “prepared by” information on page footers. Click **Next** to save any entries or changes to existing entries.

My Names

General Information

First name	Demo	
Middle name		
Last name	User	

Marketing Information

Marketing Name	Demo User
----------------	-----------

Designations

Available	Selected	
Accomplishments (1239) ▲ Broker (BR) CRS (CRS) GRI test (GRI) ▼	Add >>	Broker (BR) ▲ ▼
		Move Up Move Down Remove

Display Options

Default Listing Name:	System Name ▼	<input type="checkbox"/> Include Designations
Default Footer Name:	System Name ▼	<input type="checkbox"/> Include Designations

My Addresses

Available Addresses	Description
<div style="border: 1px solid gray; padding: 2px;"> Home ▲ Office ▼ </div>	Address type: Office Address: 1414 Anywhere St Fargo, ND 58103 USA This is your primary address.

New Edit Remove Done

My Addresses

Click on **My Addresses** to enter Address information. Click **New** to enter a new address, **Edit** to change an address or **Remove** to delete an address.

Choose the Address type from the drop-down menu. Type in a description for the address, such as Home or Office. Type your complete address information into the fields available. Choose **Yes** or **No** as to whether this is the primary address for you. Typically, your primary address will be your business address.

Click **Next** to save the information. Click **Done** to return to the My Profile section.

If you are editing an existing address, choose the address from the list that you wish to edit and click **Edit**. Make the changes and click **Next** to save.

Edit Address

Address Information

Address Type:	Office ▼	
Address Description:	Office	
Street 1:	1414 Anywhere St	
Street 2:		
City:	Fargo	
State/Province:	North Dakota ▼	
Zip/Postal Code:	58103	
Country:	United States ▼	
Is this your primary address?	Yes ▼	

Next >>



My E-Mail Addresses

E-mail addresses are particularly important to enter in the Profile information. The e-mail functions of flexmls™ Web will not be available to you unless you enter an e-mail address in your Profile. Your primary contact information is used throughout the system, so it is important to complete the My E-mail Addresses section of the Profile.

Click **New** to enter a new address. To edit an existing address from this screen, choose the e-mail address that you want to change and click **Edit**.

Choose the type of e-mail address from the drop-down menu. Give a description and then type in the e-mail address.

My E-Mail Addresses	
Available E-Mail Addresses	Description
<div style="border: 1px solid gray; padding: 5px;">Office</div>	E-mail type: Office E-mail address: support@fbsdata.com This is your primary e-mail address.
<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Done"/>	

Edit E-Mail Address	
E-Mail Address Information	
E-Mail Type:	Office
E-Mail Description:	Office
E-Mail Address:	support@fbsdata.com
Is this your primary e-mail address?	Yes
<input type="button" value="Next >>"/>	

Choose whether this address is your primary e-mail address. The address that is primary will be automatically defaulted for anything that you e-mail from the system. This will be the address where responses will be directed. Click **Next** to save the information. And click **Done** when you are finished modifying your e-mail addresses

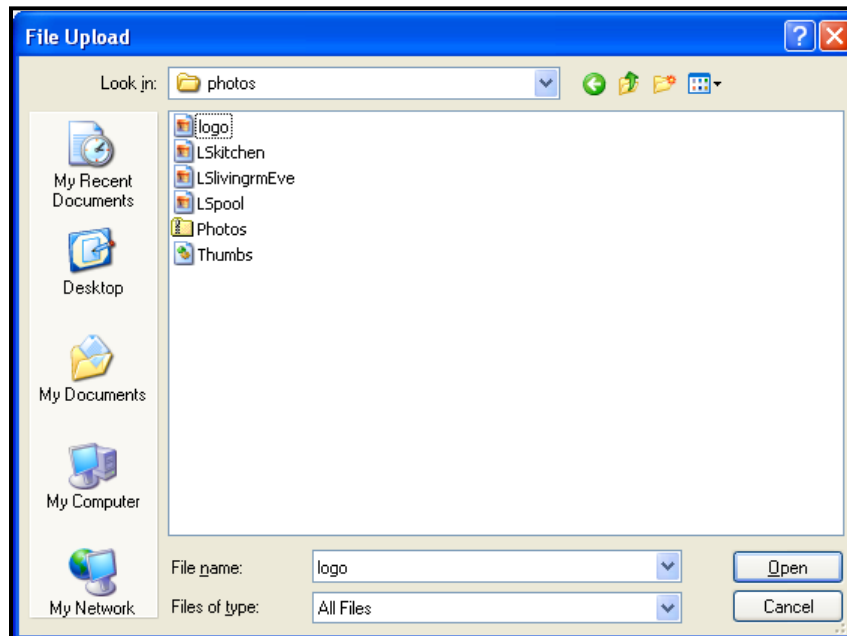
Personal Photo and Logo Maintenance

Within flexmls Web, you have the capability to upload personal agent photos, company logos, or any other images that you would like to appear with your contact information. To upload photos or logos, click on **Personal Photo and Logo Maintenance** from My Profile.


Add Logo or Photo	
Logo or Photo Information	
Type:	<input checked="" type="radio"/> Logo <input type="radio"/> Photo (of yourself or office, not of a listing) <input type="radio"/> Other Image
Logo or Photo Description:	<input type="text"/>
File:	<input type="text"/> <input type="button" value="Browse..."/>
<input checked="" type="radio"/> Resize <input type="radio"/> No Resize	<input type="button" value="Add"/>
Select Preset Image	Please Note: If resizing the photo or image, the actual dimensions may vary from the dimensions specified. The photo/image is resized proportionately according to the image's original dimensions so the image does not become distorted.
Width: 130	
Height: 80	
<input checked="" type="checkbox"/> Preserve aspect ratio	

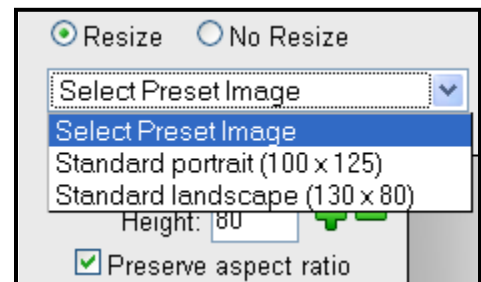


To add a new Photo or Logo, click **New** at the bottom of the screen. Select the type of file you wish to add by clicking on the radio button next to Type. You must enter a description of the file for identification. When you are ready to proceed, click **Browse**.




You will be presented with a window where you may locate the file on your computer. Find the file you wish to upload, click to highlight it, and click **Open**. The image will appear within the Add Photo or Logo window. If you are loading a large image, you will want to check the radio button to resize the image automatically.

A drop-down list of default sizes for portrait or landscape images will appear below the radio buttons. You may make adjustments to the recommended sizes if necessary by clicking on the  icons next to width and height.



Click **Add** to upload the file. You will then return to the My Logos and Photos screen. An image entered as the Photo type will appear within the profile block of listing reports (personal photo). Images entered as Logos or Other Images will be available for use in public websites.

To include both a logo and a personal photo on e-mails or your generic business card, use an image editing program (such as Paint) to combine the logo and personal photo into one image. Upload that combined image as your personal photo. The first Photo on the list will be your primary photo, which is used throughout the system.

To edit an existing entry, click on the entry to highlight it and click **Edit**. You may change the description, replace the file, or resize the existing image. Type in a new description and click **Update** to complete your edit. Click **Browse** if you wish to replace the current file. If you wish to make the image smaller, click on the  icon next to width or height.

To remove an existing photo or logo, click on the name of the image to highlight it and click **Remove**. Click **Next** to remove the entry shown. Click **Back** at the top left of your browser to return to the previous screen.



My Documents

You may add or edit documents to be used in presentations for prospects within the system. Click **New** and type in a description for a new document, and then select the type of document. You may upload any PDF document or create Text/HTML documents using the built-in light word processor. For example, you might like to add a personal or firm résumé, a marketing calendar, or other documents for use in listing presentations.

Available Documents	Description
<div style="border: 1px solid gray; padding: 5px;"> Colorful Document Customer Testimonials EOM Important PDF Melissa's Test test </div> <div style="margin-top: 5px;"> <input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Done"/> </div>	<div style="border: 1px solid gray; padding: 5px;"> Partial preview of Customer Testimonials </div> <div style="border: 1px solid gray; padding: 5px;"> <h3 style="margin: 0;">Customer Testimonials</h3> <ul style="list-style-type: none"> ◆ 'I could not be happier with my experience with Test Office Realty. Demo User was attentive to our needs, helped stage our home before taking pictures, and searched diligently for buyers. We got offer after offer and accepted one higher than our asking price. I will recommend Demo User to all of my friends.' ◆ 'Demo User knew just how to help me find my dream house! I loved looking at the virtual tours, and the maps she sent me made it easy to meet her for walk-throughs at properties.' </div>

My Phone Numbers

Available Phone Numbers	Description
<div style="border: 1px solid gray; padding: 5px;"> cals number fax return number Fax Mobile Office Phone </div> <div style="margin-top: 5px;"> <input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Done"/> </div>	<div style="border: 1px solid gray; padding: 5px;"> Phone type: Office Phone number: 555-5555 Ext. 333 </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> This is your primary phone number. </div>

flexmls Web allows for the input of multiple phone numbers (fax, business, pager). However, a primary number must be selected. To enter in a new phone number, click **New**. Choose the type of phone number from the drop-down menu. Enter a description for the number. Enter the phone number and decide whether to designate it as your primary number, then click **Next** to save. Adding additional phone numbers is done in the same manner. To edit an existing number, choose it from the list and click on **Edit**.

My Web Addresses

Any web addresses you would like to see within your contact information are entered under My Web Addresses. These addresses could include your agency's web page, your personal web page, or any other web site that you would like to include with your contact information.

Available Web Addresses	Description
<div style="border: 1px solid gray; padding: 5px;"> Office </div> <div style="margin-top: 5px;"> <input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Done"/> </div>	<div style="border: 1px solid gray; padding: 5px;"> Web address type: Office Web address: http://www.flexmls.com </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> This is your primary web address. </div>




Click **New** to enter a new web address. To edit an existing address from this screen, choose the web address that you wish to edit and click **Edit**. Choose the web address type from the drop-down menu. Give it a description and then type in the URL. (i.e., www.exampleralestatecompany.com) Choose whether this web address will be your primary address and click **Next** to save the web address.

Change My Password

One of the things that you should do once you are logged in to the system for the first time is to change the password you were assigned. Only you should know your password. To change your password, click on the **Change My Password** icon. Type in the old password and then enter a new password. The only requirement for the new password is that it must be between four and eight characters. You will need to type the new password twice to verify the entry. Click **Next** to save the changes.



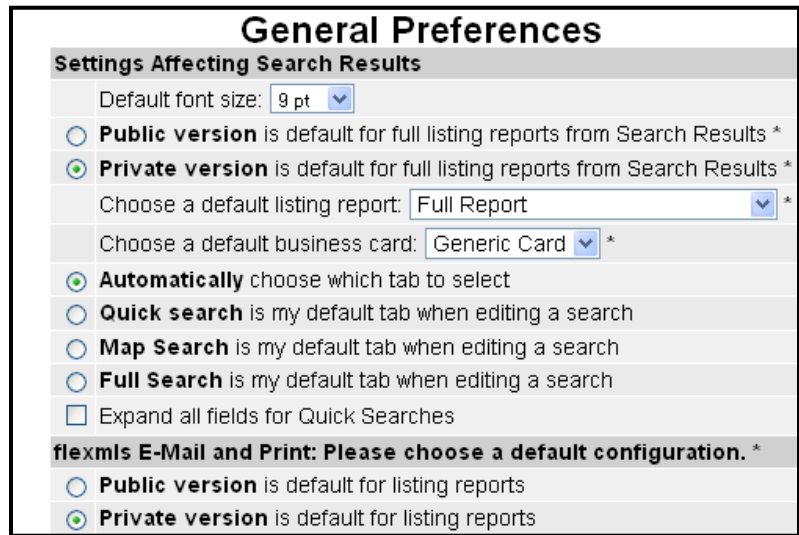
 **Tip:** If you forget your password, contact your MLS office to have your password reset.

GENERAL PREFERENCES

To set preferences for how you would like your screens to appear in flexmls Web, click the **General Preferences** link under Preferences on the menu.

Preferences:

- **Font size** – Set your default font size for the search results page here. Changes to the font size made from the Search Results page will also change this preference. This setting also controls the font size on the print page when printing the List tab.
- **Public/Private Version** – Choose whether you would like the Public or Private version of full listing reports to display by default on the Search Results page.
- **Default Listing Report** – Select which listing report you would like to use as your default when viewing reports on the Search Results page.
- **Default Business Card** – Select which business card you would like to display on e-mailed reports.
- **Default Edit Search Behavior** – By default, when clicking on the Edit Search tab, flexmls Web will return you to the tab that corresponds with how the search was initially run (the setting "Automatically choose which tab to select" is on by default). If you prefer, you can choose to make the Quick, Map, or Full Search your personal default when editing a search.
- **Edit Search Tab** – select whether you would like the page to automatically choose which tab to select when you navigate to the Edit Search tab, or select the Quick Search, Map Search, or Full Search as your default search editing tab.



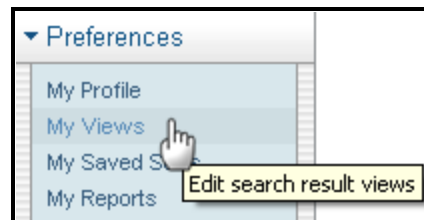

- **Enable Location Searching** – the location search box allows users to type in a city, streetname, or other location information to search for listings. This checkbox controls whether this search box is available on IDX links and portals, for users who subscribe to flexmls IDX.
- **Expand all Fields for Quick Searches** – by default, flexmls Web opens Quick Searches with the search fields collapsed for easy scanning and reading - mark this preference if you would like the search fields to be open when beginning a Quick Search.
- **flexmls E-Mail and Print** – Choose whether you would like to default to the Public or Private version when printing and e-mailing listing reports (your MLS preference determines whether you are able to e-mail Private Listing Reports).
- **MLS E-Mail** – Choose whether you would like the Public or Private version to be the default for MLS E-Mail links.
- **E-Mail Type** – Choose whether you would like your e-mails to be in HTML format or Text format by default. HTML formatted e-mails offer rich formatting options, but some recipients' e-mail accounts restrict HTML e-mails.
- **Default E-Mail Attachments** – This preference allows you to select which attachments (Virtual Tour, Documents, etc.) you would like to include when sending automatic e-mails.
- **E-Mail Daily Hot Sheet** – Select whether you would like a daily e-mail link to the Hot Sheet, and if so, select the 24-Hour Hot Sheet or Custom Hot Sheet. The link will open a flexmls Web page with the current hot sheet (not a static copy).
- **Auto E-Mail Defaults** – Select a business card, card orientation, and accent background color to set as the default settings for your automatic e-mail events.
- **Notification E-Mail** – This setting controls the listing notification e-mails that you may choose to receive when an e-mail recipient clicks on a listing link for the first time. Choose whether you would like to receive your notification e-mail in HTML or Text format.
- **Listings to Expire/Sold Listings Range** – Customize the timeframe for the Listings to Expire and Sold Listings links on your dashboard, when you use the flexmls dashboard.
- **flexmls Web Menu** – Select the default orientation for your menu. The default flexmls Web menu runs horizontally across the top of the screen. Click to select a vertical flexmls Web menu at the left edge of the screen.
- **My Listings** – Choose which listing statuses you would like to include when displaying the My Listings page, and the Office and Company Listings pages.
- **Off-Market Listings** – Set the number of days you would like Off-Market listings to appear on the My Listings screen.
- **Expiring Listing Notification** – You may set a notification to alert you when a listing under your control is about to expire. Select the number of days' notice you would like before a listing expires.
- **E-Mail Notifications of Messages** – You may select whether you would like e-mail notification for messages sent from within the system, and specify whether you would like those notifications for messages sent directly to you, and/or for MLS broadcast messages.
- **Document Fax-In Settings** – If your MLS uses Document Fax-In, select your preferred error notification method by selecting the appropriate radio button.
- **Bulk E-Mail Options** – If your MLS offers bulk e-mail as an option, you may choose to opt out of it using this preference.
- **Wireless Settings** – Choose the number of listings you would like to display at once when using the flexmls wireless page.



MY VIEWS

A View is a set of columns used to look at information on the Search Results Screen. Every column that appears in the search results may be individually selected so you may look at just the information fields that are useful to you. For example, when looking at Closed listings, you may want to see columns for Sold Date, Sold Price, Days on Market, and Selling Agent. When looking at Active Listings, columns like List Price, Bedrooms, and Bathrooms, are more relevant.

To create a view, click on **My Views** under Preferences on your menu. On the My Views screen, click **New** to enter a new View. (If you would like to edit an existing view, choose from the list of available views and click on the **Edit** button.)



The Create View screen is divided into three tabs – General, Fields, and Sort.

General

 A screenshot of the 'Create View' dialog box with the 'General' tab selected. The dialog has 'Cancel' and 'Save' buttons in the top right. The 'General' tab contains the following fields and options:

- Description: [Text input field]
- Report Description: [Text input field]
- Show Photo: Yes No
- Inheritable: Yes No
- Default for Type(s):
 - Multiple Property Types
 - Residential
 - Condo/Co-Op
 - Townhouse/Villa
 - Land/Acreage
 - Commercial
 - Rental

The General tab contains general information about the View. Begin by entering a description for the View. The Description will serve as the name of the View, so choose a name that will make the View easy to identify in a list. Next, enter a Report Description for the View. The report description prints out when using the Printer Friendly/Print Page function. Choose whether you would like to have a thumbnail photo appear for the listing by selecting Yes or No using the radio buttons.

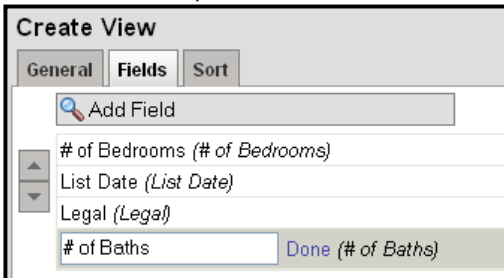
You may choose if you would like to make the View inheritable. By making a View inheritable, you are allowing all logins below your access-level to use the View. For example, the Agency login may set up Views that are inheritable so that all of the agents in the office may also use these Views. Choose if you would like the View to be the default for property types by clicking the box next to the option you would like. You may choose any or all of these options.

Fields

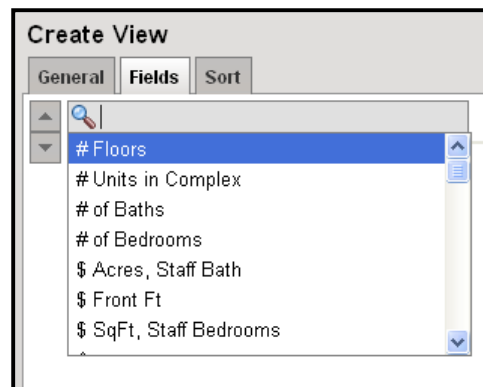
On the Fields tab, define which columns of information are present on your View. Choose the columns that you would like to see in the View by clicking on the **Add Field** text box. You may scroll to view available fields or begin typing to narrow the list. Click to select the field, and repeat the process as necessary until all fields are present.

 A screenshot of the 'Create View' dialog box with the 'Fields' tab selected. The dialog has 'General', 'Fields', and 'Sort' tabs. The 'Fields' tab contains an 'Add Field' text box with a magnifying glass icon and a search icon.


You may reorder your selected fields by clicking on the field name and using the arrow buttons. You may also edit the name of the column to conserve space – for example, “Days On Market” could be abbreviated to “DOM.” To edit a field name, click on it to select it. A text box will open



where you can edit the field name that will display. Click **Done** to save the new name for the field. The full field name will appear in parentheses for your reference.



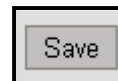
Sort

If you choose, you may customize how the information in your View is sorted. By default, the information will sort according to the fields you have chosen, in order. If you would like to sort in a different order or by fields that are not present in View, click the radio button marked Custom. Add fields by clicking **Add Field** and selecting the fields you would like to sort. For each field, you may choose if you would like to sort in Ascending or Descending order.

of Bedrooms Ascending Descending

Save

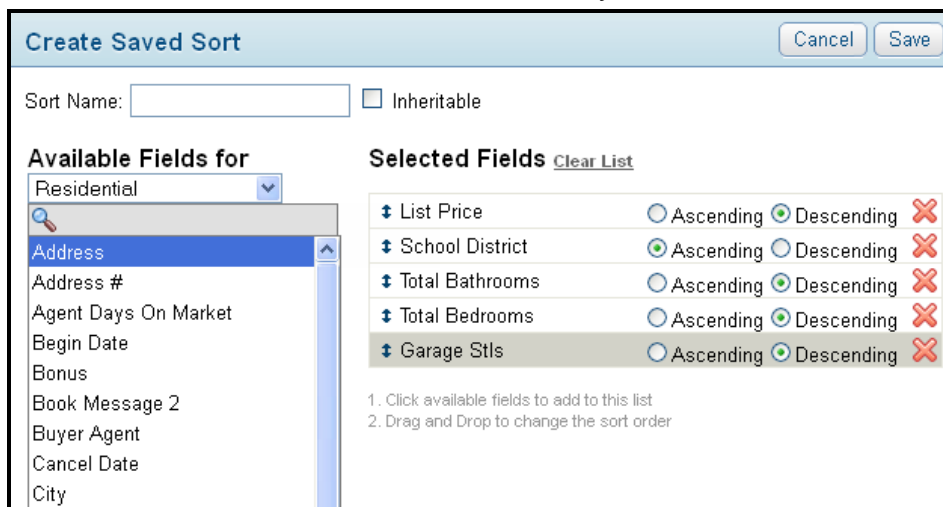
When you are satisfied with your selections, click **Save** to save your View.



MY SAVED SORTS

A saved sort is a set of fields used to sort information on the search results screen. By creating saved sorts, you can customize the order of listings, regardless of whether those fields are present in the view you are using.

Click on an item from the Available Fields column to add it to your sort. The Selected Fields column will update to include your selection. In the Selected column, drag items in the selected list to change the order in which the sort will be applied, use the radio buttons to select whether that field should use ascending or descending order for the sort, or use the red x to remove the field from the sort.

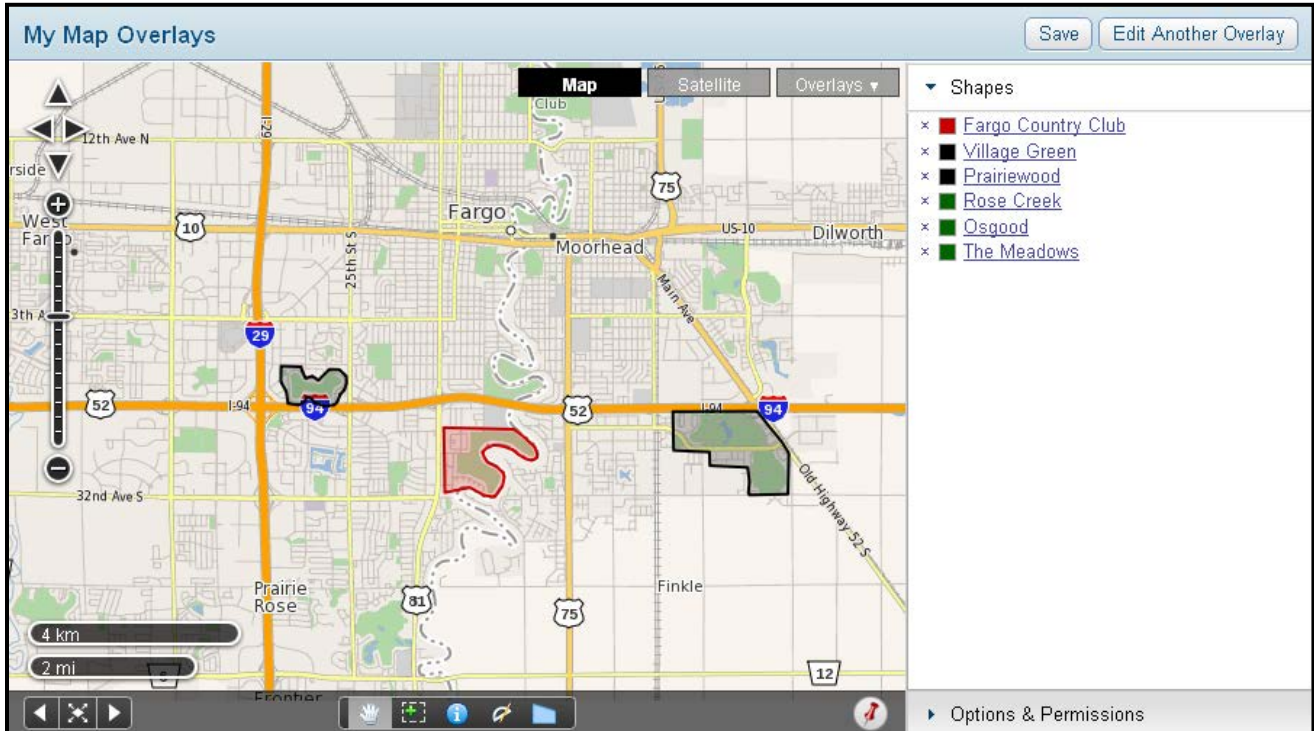


When you are satisfied with your selections, enter a name for your saved sort and click **Save**. Use the box marked Inheritable to make the saved sort available to logins under your control (applicable to MLS-level, Company, Office, or Broker-level logins).



MY MAP OVERLAYS

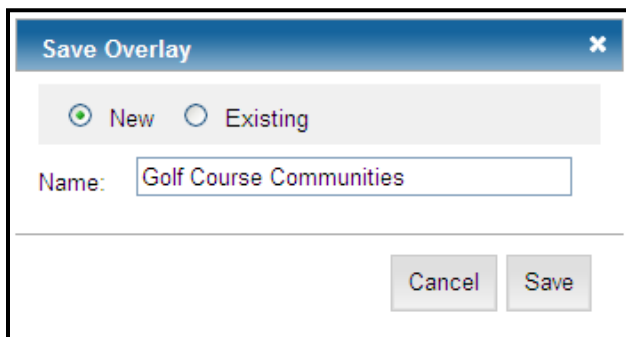
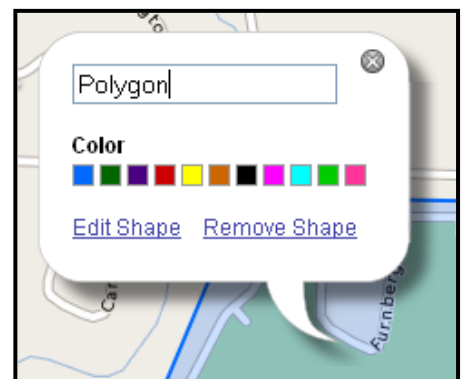
A map overlay is a collection of saved shapes. Using this function, you can create multiple overlays containing relevant shapes for your market. For example, you may choose to save a set of shapes defining golf course neighborhoods or school districts. These shapes are then available to you when performing searches or when using the statistical gadgets of the dashboard, or you may give the shape to other members of your office.



Creating a Map Overlay

To create a map overlay, click on **My Map Overlays** under Preferences on your menu. The first time you enter the page, a welcome screen will explain the process for creating a Map Overlay. Click on **Let's Begin** to continue.

The My Map Overlays page will display a map of your area. Use the zoom and pan tools to get the map to the position you prefer, then use the polygon tool to define shapes. To use the polygon tool, click on the tool to select it, click once on the map to define the first corner of the polygon, then continue clicking (without holding down the mouse button) to define as many other points as you wish; double-click to finish the polygon. Once the shape is complete, click

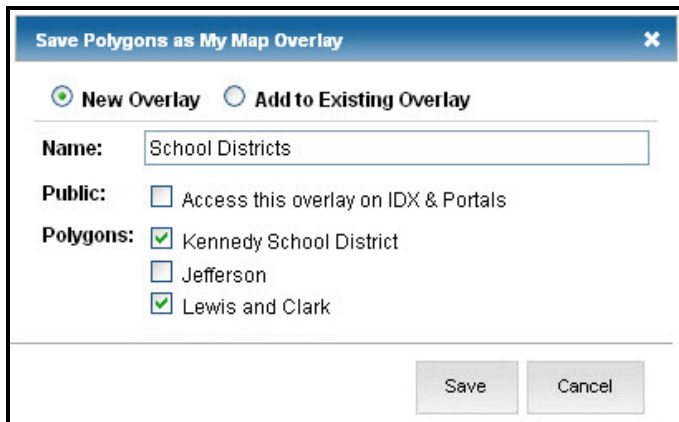
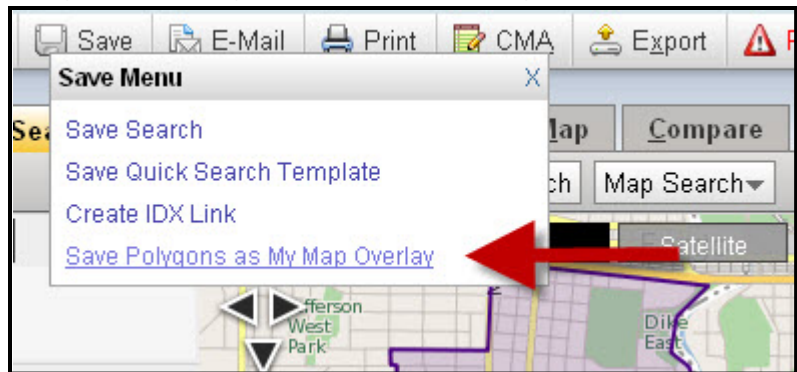


on the shape and click **Edit** to give the shape a name and set a color for the shape. It is important to name each polygon within your overlay, so that when you are using the shapes on a search or statistical gadget, it is clear to you which shape you are selecting. Repeat the process as you draw additional shapes on the overlay. When you are done creating shapes, click **Save** at the upper right corner of the page. Give the overlay

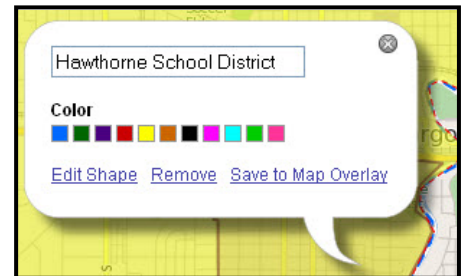


a name then click **Save**. If you are editing an existing overlay, you'll be given the option to save the overlay with a new name by selecting the **New** radio button.

You may also save a polygon from Search Results page as a Map Overlay. When you have drawn a polygon on the map, click **Save**, then choose **Save Polygons as My Map Overlay**.



You'll be given the option to save the polygon(s) as a new overlay, or to add them to an existing overlay. All of the polygons currently on the map will be displayed, so you can save any or all of the polygons to an overlay. When saving a new overlay, you'll have the option to denote whether that overlay

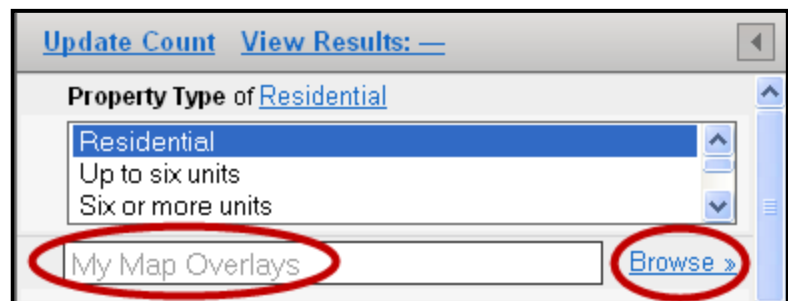


should be available on public-facing sites - IDX and Portals.

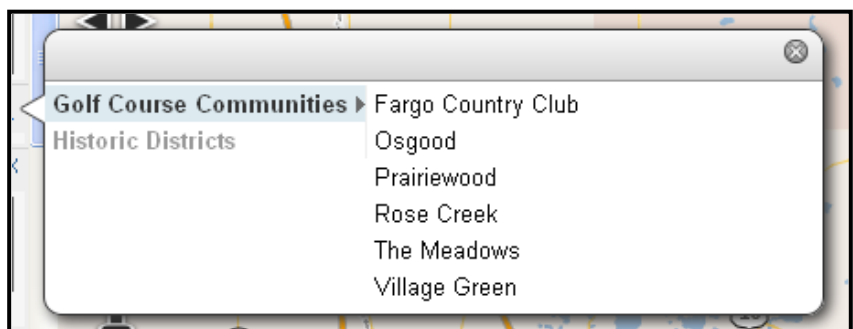
You may also save the shape as an overlay by clicking on the shape, and after clicking **Edit**, clicking **Save to Map Overlay**.

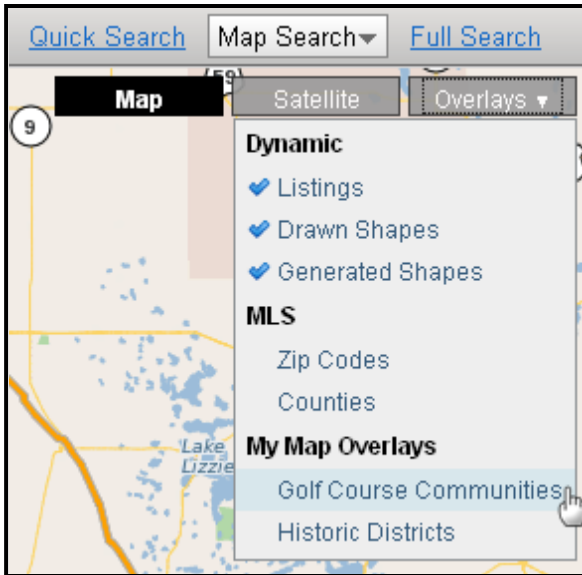
Using a Map Overlay

When using a Quick Search or Map search, near the top of the search criteria panel a text box will display. According to your MLS Settings, you'll be able to access Map Overlays or Map Overlays and the Location Search here. Type in the text box, or click **Browse** to view a list of available options.

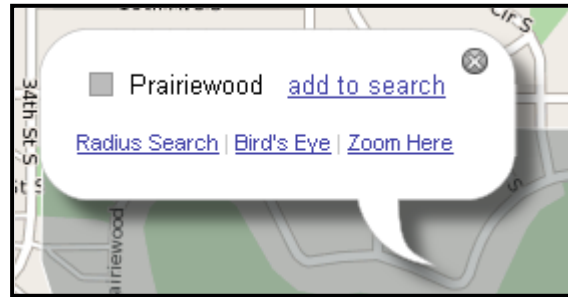


Double-click on a shape name in the list to add it to your search. While the list is open, you may select as many items as you wish – hold the control key on your keyboard down as you click to select multiple items, or click on one item, hold down the shift key on your keyboard, then click on another item to select all of the items between those two. When multiple items are selected, hit **Enter** on your keyboard to move the full selected list to your search.





If you prefer to browse through the overlay shapes visually, use the Overlays drop-down on the map, and choose an overlay from the list. From here, you may click on any of the shapes on the map, and in the information bubble, click **Add to Search**



Map Overlays in Saved Searches

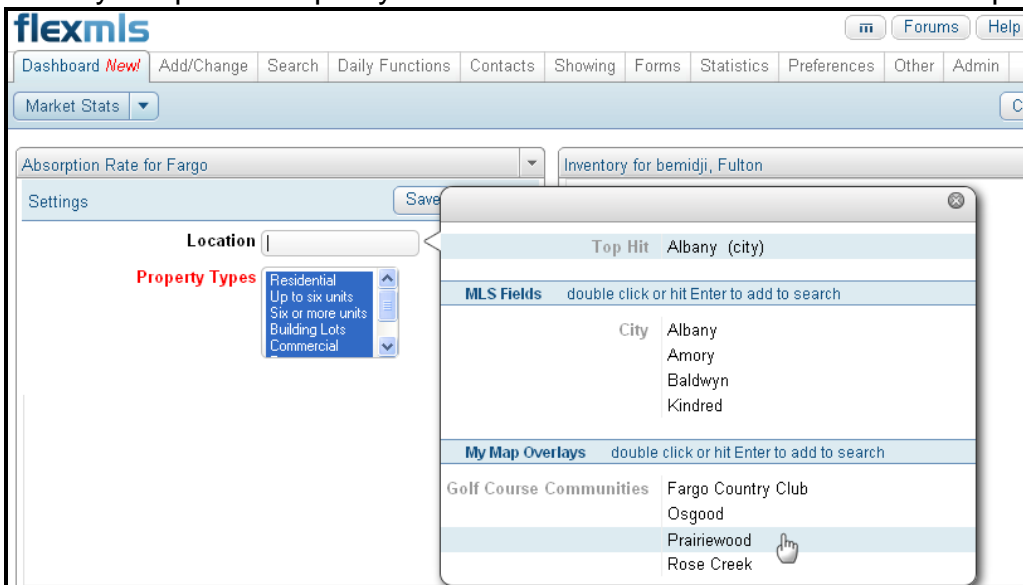
When you save a search including a shape from a map overlay, any changes you make to the overlay will be reflected on the saved searches that use it. In this way, you can make an update once, and all searches that use that overlay will be updated immediately.

You also have the option of making a change to the shape for one specific search. For example, if you have a client who would like to live in an outlined neighborhood, but only in one section, you can click on the shape and edit the boundary. As soon as you make any change on the search results page to the color, boundaries, or name of the shape, the shape is saved separately, only for the current search. This is indicated in your list of criteria, where rather than appearing beneath the named overlay, the shape is now listed under the general heading "Shape."



Map Overlays in Statistical Gadgets

You may also use your overlays on the statistical gadgets of the dashboard. For example, on the Absorption Rate gadget, click settings, then type in the Location box to locate the overlay shape or shapes you'd like to use. Double-click on the shape, or while one or more shapes



are selected, hit enter on the keyboard to add the shape to your gadget. Click **Save** to save your settings, and the statistical gadget will now display statistics specific to your designated location.



MY REPORTS

See the section on Custom Reports for detailed information on customizing reports.

MY QUICK SEARCHES

The My Quick Searches function allows you to customize your own searches to retrieve listings. A quick search template is a form containing a few fields of information with which to complete a search. This is compared to the Full Search, which allows you to select from every searchable field in the MLS to retrieve listings.

You may customize as many quick search templates as you would like. For example, you may want to set up a template that you use every time you are searching for Vacant Land. This would allow you to search fields such as Status, List Price, Area, Lot Acres or Lot Size, or Zoning. Once the quick search templates have been customized in the Preferences, they are found under Search on the menu.

To add a new quick search template, click on the **My Quick Searches** link under Preferences on the menu. Click **New** to add a new template. (To edit an existing template, choose it from the list of available templates and click **Edit**.)

Enter a description for the quick search template so that you may easily find the search later. Choose whether you would like to have the name of the Detail Group appear before the names of the Detail Fields in the search template by clicking the radio button next to either option. Choose the property types for the quick search template. To choose more than one, hold your Control Key (CTRL) while clicking.

Choose whether you would like to make the template inheritable by clicking the radio button next to that option. If a quick search template is inheritable, it is available for use by logins below yours. The Agency login can make a template inheritable so that all of the agents in the office will be able to use that template. Choose the View you would like to be associated with this quick search template by selecting it from the list. Each time you use this search template, the information will appear on the Search Results Screen using this View. Click **Next** to continue.

Choose the fields you would like to use in your quick search template by selecting them from the list of Available Fields and clicking **Add**. Each field that will be used in the template will be placed in the right column. You may reorder the fields as you would like them to appear in your template by selecting them and clicking **Move Up** or **Move Down**. Click **Next** to save the quick search template.



Tip: It is important to include the Status field in every quick search template. If you do not include the Status field, you will not be able to specify any status when using the template to conduct a search.



MY EXPORTS

The My Exports function allows you to specify the fields to export when choosing Export Listings from the Search Results Screen, and selecting the Custom Text Export option. To create an Export Template, click **New**. Begin by naming your export. Select whether you would like Detail group names to show, and which property types for which you would like the export template available for.

Choose the fields you would like to export by selecting them from the list of Available Fields and clicking **Add**. Each field that will be used in the template will be placed in the right column. You may reorder the fields as you would like them to appear in your export by selecting them and clicking **Move Up** or **Move Down**. Click **Next** to save the Export Template.

New Export Template

Export Template Properties

Export name

Show Group Name Detail group names show in front of the detail name
 Detail group names do **not** show in front of the detail name

Property Types

Residential
All Fields Test
Commercial
Multifamily

[Next >>](#)

Choose Fields for Export Template

Quick search name: Sales Tracking Export

Field Setup

Available Fields	Template Layout
<ul style="list-style-type: none"> Miscellaneous: Location Miscellaneous: Sign Owner Type: Buyer Name Owner Type: Seller Remarks Photos: Photo of Photos: Photo of Photos: Photo of Utilities: Air Utilities: Average Utilities Utilities: Cable Utilities: Electric Utilities: Estimated Heat Cost Utilities: Gas Utilities: Heat Utilities: Sewer Utilities: Water Utilities: Water Heater Utilities: Water Heater Type <p style="text-align: right;">Add >></p>	<div style="border: 1px solid gray; padding: 2px; display: inline-block;"> Sold Date Selling Member Selling Office Days On Market Original List Price Sold Price </div> <div style="text-align: right; margin-top: 10px;"> Move Up Move Down Remove </div>

[Next >>](#)



PORTAL PREFERENCES

flexmls Contact MLS Forums Help Log Out

Dashboard Add/Change Search Daily Functions Contacts Showing Forms Statistics Preferences Other

Portal Preferences

Portal

Name: DemoUser
 Your portal url: <http://portal.flexmls.com/DemoUser>
Note that this name will be used by all clients who log in to your Portal

Status: ON OFF

Portal Signup

Auto-create: ON OFF
 First Search: When ON, a prospect signing up for a portal account will have an initial search created automatically, based on their current search. They will also automatically be signed up for "Daily E-Mail Updates."

Required Fields: Address Phone Number

Send Lead Notices To: Primary

E-mail Greeting

When Creating New Accounts, Automatically Send Email Greeting

Templates:

Subject: Your Customer Portal

Message:

Business Card: None

Portal Preferences

Show Saved Searches in the "New Search" menu

Start Position: Default

List view: [1- Residential] Use view associated with search/link

List sort: Sort listings by New or Recently Changed first Use the sort associated with the view

Detail

Report Full Report

Tax Info

Supplement

Documents

Available Dates

Mortgage Calculator

Photos

Video(s)

Virtual Tour

Map

Compare

Messages

Branding

Business card: Generic Card

Card: Left

Orientation: Left

On the Portal Preferences page, set up the name for your portal, default e-mail greeting, and default portal preferences.

Portal Name

Set up the name for your portal. This name is used by all clients who log into your portal, so choose your name accordingly.

Portal Signup

If you subscribe to flexmls IDX service, you may select which fields are required by users signing up for a portal. By default, a name and e-mail address are required for all portal users. Using the check boxes, indicate if you'd like to require a physical address or phone number for users of your Customer Portal.

E-Mail Greeting

Set up your standard e-mail greeting that will be used for portal e-mails. A default greeting is provided, or you may customize your greeting. You may also customize each greeting individually before it is sent.

Portal Preferences

Set the start position, View, and select which tabs of the search results screen you would like to make visible by default on your client portal. Select which business card you would like to use, and the orientation of the card on the screen (left, right, top, or bottom). If you'd like to customize the background color of your portal, click to bring up the color selector. Click **Save** to save your portal preferences.



DEFAULT MAP

The default map preference lets you set the map area that will display on maps when no listings are present. For example, this default area is what would appear when beginning a map search, or viewing the map under flexmls Maps under Daily Functions on the menu.

To set the default map area, move the map to the zoom level and location that you would like to use as your default, then click to select the rectangle tool at the bottom of the screen. When the rectangle tool is selected, click once to define a corner of the rectangle, move the mouse (without holding the mouse button down) to highlight the area you'd like to use as your default, and click once to complete your rectangle. If you make a mistake, you can click on the rectangle tool to draw a new rectangle, or click on the **Reset** button at the upper right to set the map back to the MLS default. When you are satisfied with the highlighted map area, click **Save** to save your map preference.

