



flexmls® Web Contacts

Reference Guide

Class Objectives

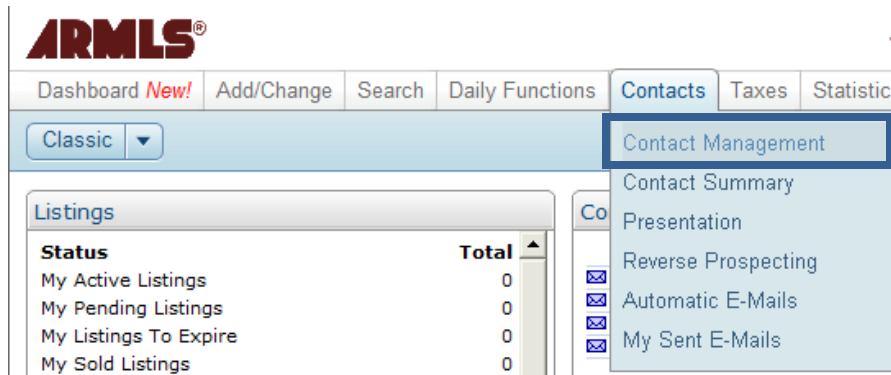
By the end of this session you should be able to:

- Enter and edit a *Contact's* information
- Attach a search to *Contact* file and add an *Auto E-Mail*
- Set up a *Portal* and make an *Agent Recommendation*
- Customize the *Contact List*

Arizona Regional Multiple Listing Service, Inc.
130 S. Priest Drive Suite 101
Tempe, Arizona 85281
480-921-7777
www.armls.com

Notes:

Add a Contact



Click *Contacts* on the Menu bar. Select *Contact Management*.

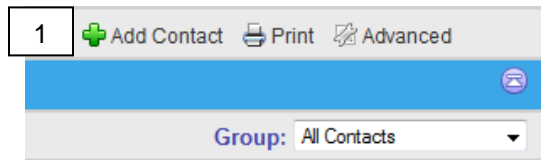
On the Contact Management screen, you can do a *Quick Add* or full entry to enter a contact into the system.

Quick Add



For *Quick Add*, enter the contact's name and e-mail address in the *Quick Add* bar, then click the *Add* button to save. You can add additional information about the contact at a later time.

Full Entry



To add more information than just the contact's display name and e-mail address (the minimum field requirements for a *Quick Add*):

1. Click *Add Contact*

ARMLS® Notice of Expiring Auto E-mails Shawna Horis-Mayer as Shawna Horis-Mayer

Dashboard Add/Change Search Daily Functions **Contacts** Taxes Statistics Preferences Other Admin

Contact Management

Display Name:
Full Name:
Spouse Name:
Organization:
E-Mail:

Groups: None

Home:

City: State: Zip:
Office:

City: State: Zip:

Primary: Mobile:
Home: Other:
Office: Pager:
Fax:

Reverse Prospecting
No Additional Info

Create a Portal Account for this Contact
An e-mail with the portal login name and password will automatically be sent.

2. Complete desired fields
3. Add to *Groups* if desired (see page 5). This action can be done at a later time as well.
4. Click *Add Contact* at the bottom of the screen

The name used in the Display Name field will now appear in the list of available Contacts. From this screen you will be able to see limited information on the list of each of the Contacts you have added to the system.

Contact Management

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

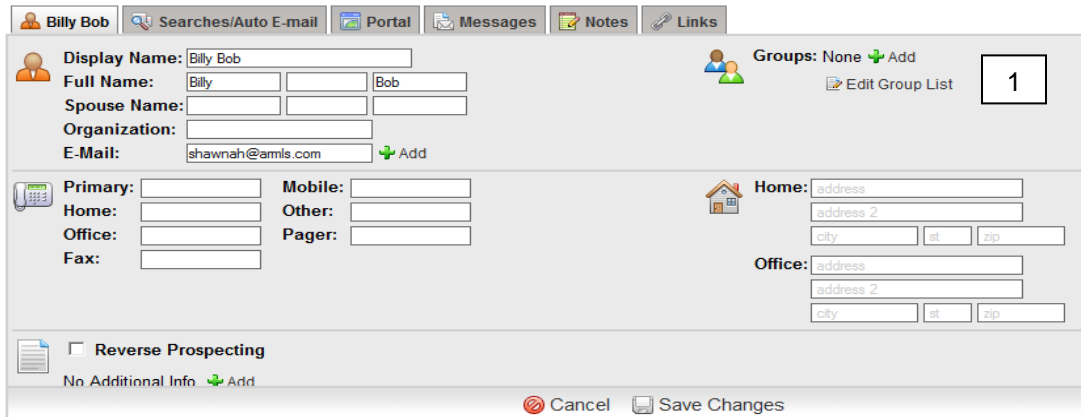
Search:

Group: All Contacts

Display Name	Phone	E-mail	A	M	V
Billy Bob Buyer		shawnasellshomes@yahoo.com	1	0	0
Brad Pitt		Brad@pitt.com	0	0	0
Chad Mayer		chadmayer@yahoo.com	14	12	19
George Clooney		george@aol.com	0	2	0
Rose S.		shawnah@armls.com	11	3	0

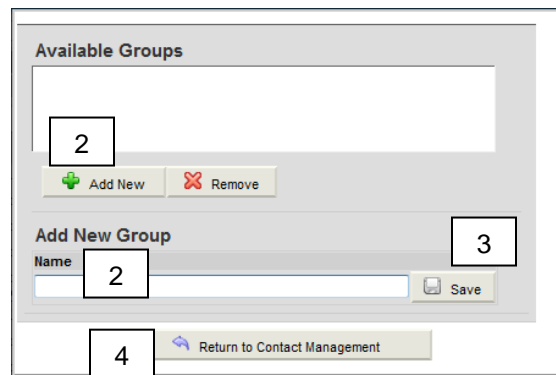
Groups

Contacts may be associated with one or more groups for better organization. To add a contact to a group, the *Group* name must first be entered into the system. This can be done either when entering a contact or editing a contact.

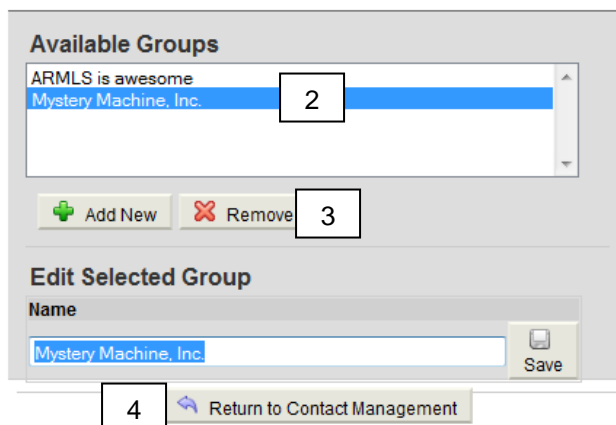


Add a Group:

1. Click *Edit Group List*.
2. Click *Add New*, type in desired name of group.
3. Click *Save*. The new group name will appear in the list of *Available Groups*.
4. Click *Return to Contact Management*.



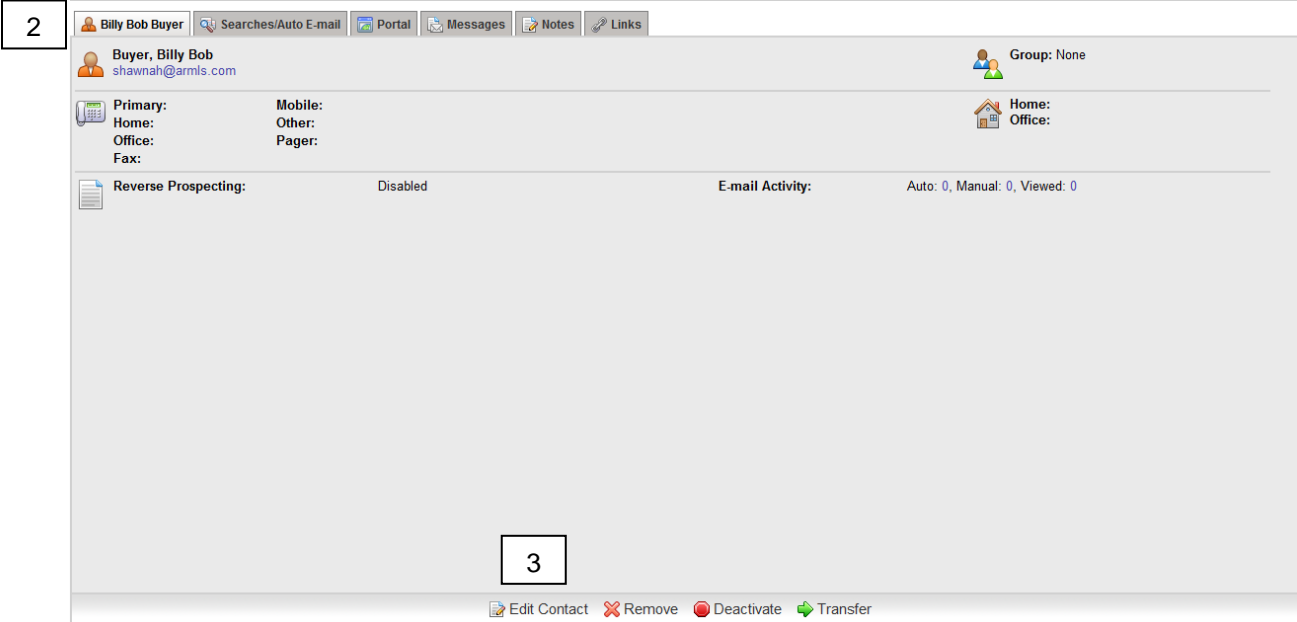
The new group name will now appear in the list of *Available Groups*. To add, edit or remove a group name, click *Edit Group List*, then choose either *Add New*, or *Remove*. Click *Return to Contact Management* to return to previous screen.



Remove a Group:

1. Click *Edit Group List*.
2. Highlight name of group.
3. Click *Remove* button.
4. Click *Return to Contact Management*.

Edit a Contact



1. Click name of contact from the list of Contacts.
2. On the bottom of the screen you will be on the tab displaying the contact's name. This tab includes the contact's full name, phone numbers, addresses and group information.
3. Click the *Edit Contact* button at the bottom of the screen to make changes. Please note that a Contact can be added to a group or groups when initializing a contact file or any time thereafter.

Transfer a Contact

You may transfer a contact to another Subscriber within flexmls.

The screenshot shows the 'Contact Management' interface. At the top, there are search fields for 'First Name', 'Last Name', and 'E-mail', along with a 'Portal' button and an 'Add' button. Below this is a search bar and a 'Group' dropdown menu set to 'All Contacts'. A table lists several contacts with columns for 'Display Name', 'Portal', 'Phone', and 'E-mail'. The contact 'Billy Bob Buyer' is highlighted, and a box with the number '1' is placed over his name. Below the table, there are tabs for 'Billy Bob Buyer', 'Searches/Auto E-mail', 'Portal', 'Messages', 'Notes', and 'Links'. The detailed view for 'Billy Bob Buyer' shows his email address 'shawnah@armls.com', a 'Group: None' indicator, and various contact details like 'Primary', 'Home', 'Office', 'Fax', 'Mobile', 'Other', and 'Pager'. It also shows 'Reverse Prospecting' as 'Disabled' and 'E-mail Activity' with counts for 'Auto', 'Manual', and 'Viewed'. At the bottom of the detailed view, there is a box with the number '2' and a row of action buttons: 'Edit Contact', 'Remove', 'Deactivate', and 'Transfer'.

Display Name	Portal	Phone	E-mail
Abe and Mary Sheridan	ON	(480) 222-2222	joteeter@cox.net
Alice Lewis	ON	(480) 222-1111	alice@lewis.com
Allen Jones	OFF		
Billy Bob Buyer	OFF		shawnah@armls.com
Brad Pitt	OFF		jteeter@armls.com
Dave	ON		jonesdave@yahoo.com
David Smith	ON		jteeter@armls.com

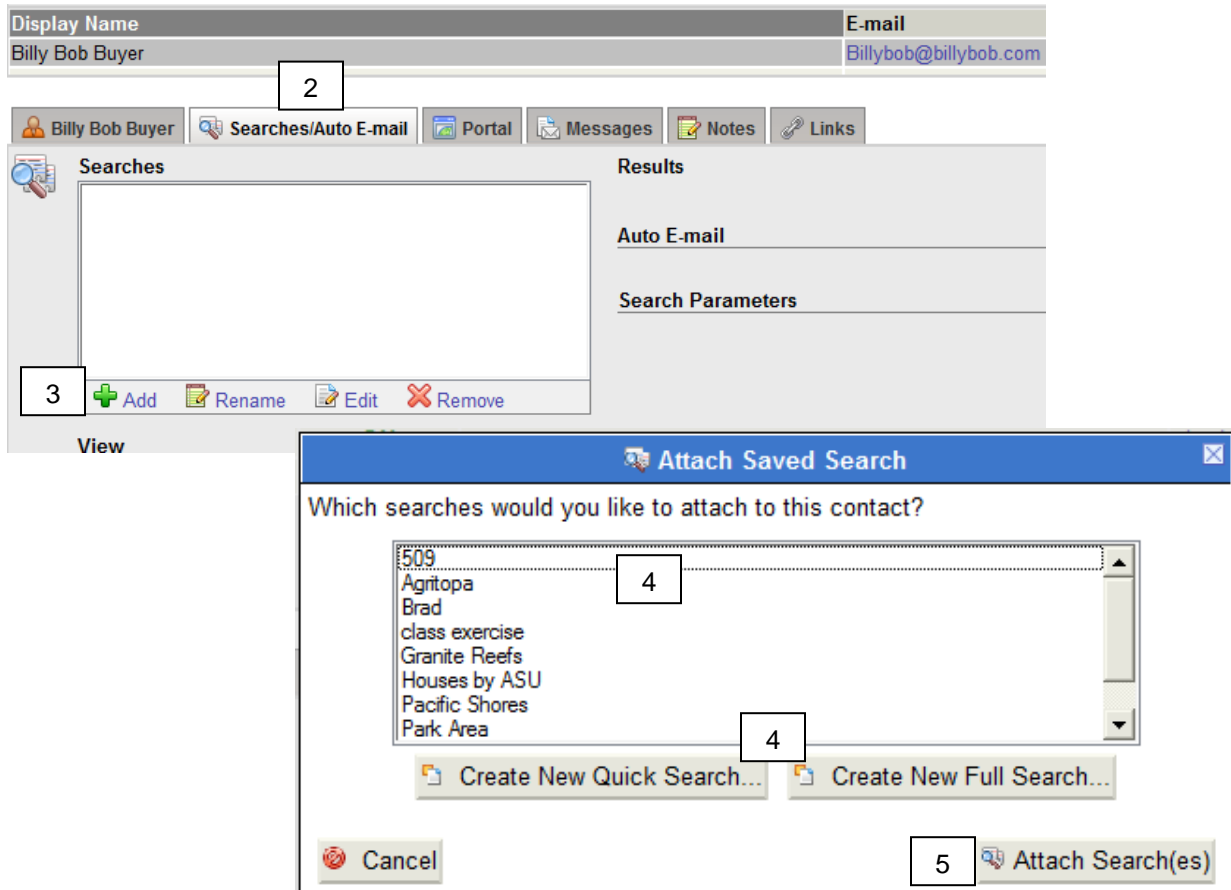
1. Click on your contact's name.
2. At the bottom of the page, click the *Transfer* button.
3. In the prompt that appears, type the name of the Subscriber for whom you'd like to transfer the contact to.
4. Once you have found your user, click on their name and then click the *Transfer* button.

This will not only transfer the contact but any data associated with this contact. This includes:

- Saved searches
- Auto e-mails with the current configuration
- Messages
- Past sent links
- Notes
- Portal account (if created)
- Portal Activity including carts, favorites, possibilities, rejects and agent recommended

Adding Saved Searches to a Contact

Attaching one or more Searches to a contact tells flexmls what criteria the contact is interested in. This step is necessary in order to use the Auto e-mail and Portal options.



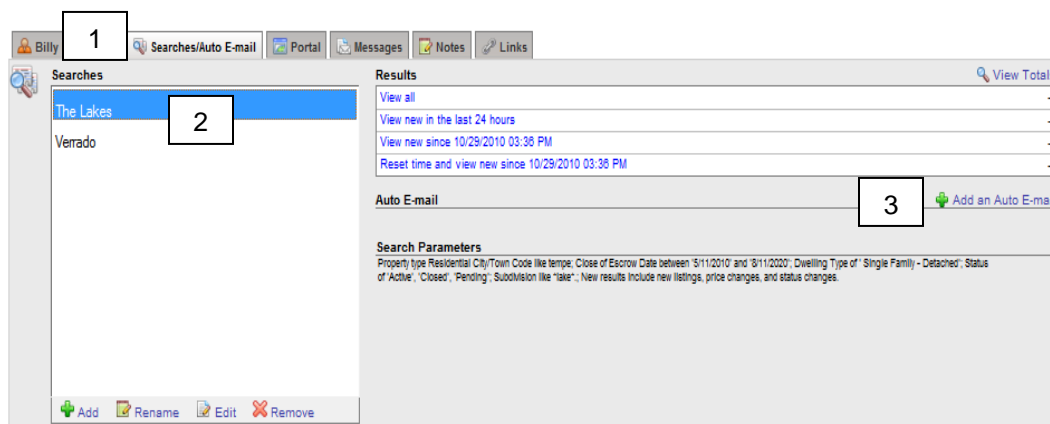
Add a Search to your contact's file:

1. Access the desired contact by clicking on the contact's name in top portion of the screen.
2. Click the *Searches/Auto E-mail* tab on the bottom of the screen.
3. Click Add to bring up a list of saved searches.
4. Choose one or more searches from the list or create a new one by clicking *Create New Quick Search/Create New Full Search*.
5. Click *Attach Search(es)* to save and return to the *Searches/Auto E-mail* screen.

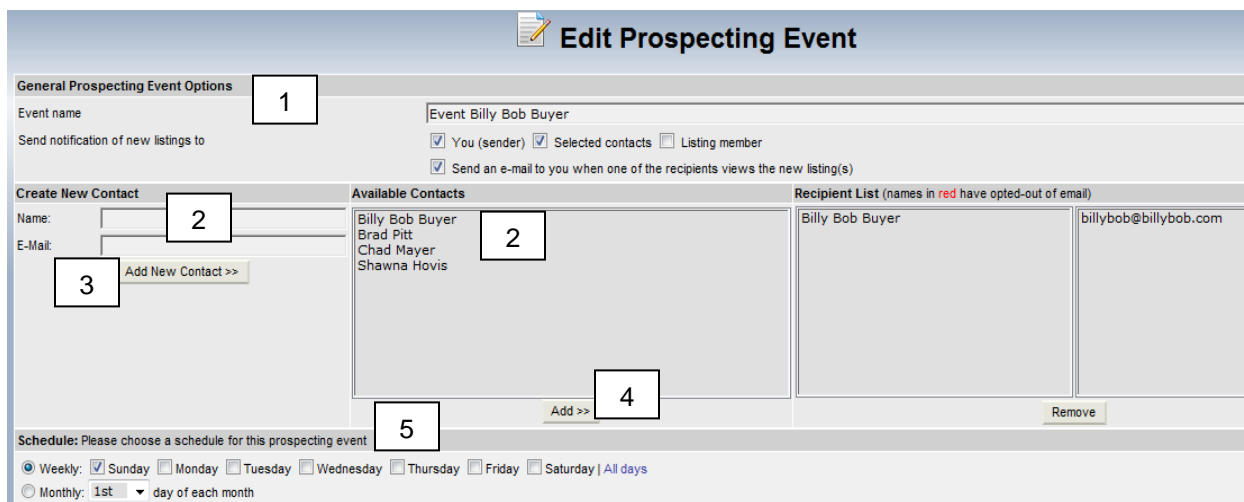
Tip: Hold down the Control button while selecting several searches from your Saved Search list and all will be attached at one time.

Add/Edit an Auto E-Mail

Set up an Auto E-Mail event:

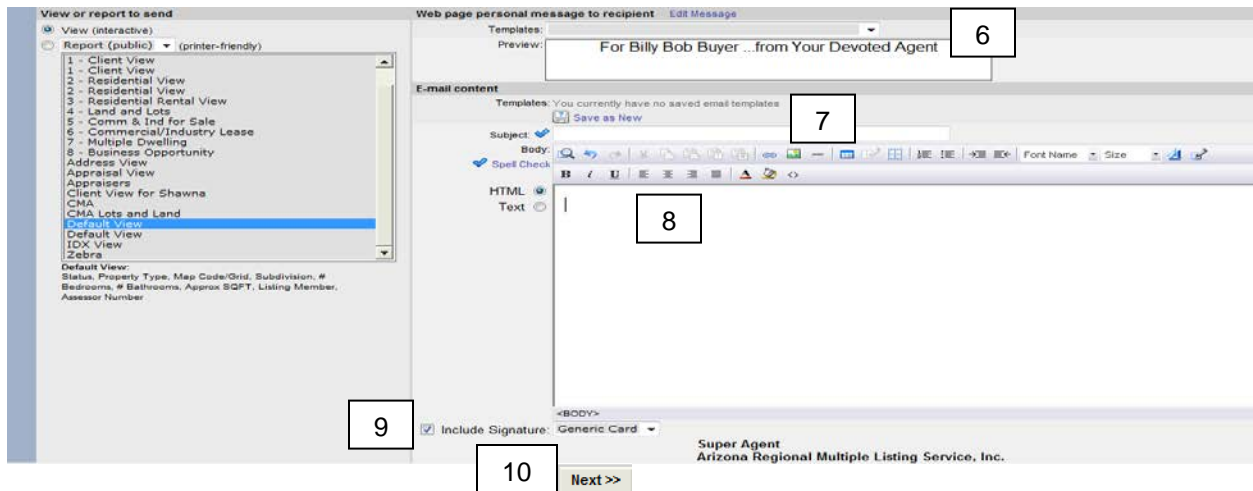


1. Click the *Searches/Auto E-Mail* tab.
2. Select the appropriate *Search*.
3. Click *Add an Auto E-mail*.



Fill in the *Edit Prospecting Event*:

1. In the *General Prospecting Event Options* section, select who will receive notification of new listings. You can also rename the Event name here.
2. Select a recipient: You can either create a new contact and click *Add New Contact* or select a name(s) from the *Available Contacts* list.
3. Click *Add* to send them to the *Recipient List* box.
4. Once a name (or names) is in the *Recipient List* click *Add*.
5. Choose a *Schedule* for the event.



6. Create the *Web page personal message to recipient*.
7. Type in *Subject Line*.
8. Create message.
9. Check box next to *Include Signature*.
10. Click *Next*.

TIP:
Spell Check is an option for both the Subject line and body of the text. Click the blue check mark to use.

The system will bring you back to the *Searches/Auto E-Mail* tab once the *Edit Prospecting Event* is complete.



1. To edit an existing *Auto E-Mail* event, click on the *Event* name.
2. Remove an event by clicking on the red **X** next to the *Event* name.

By default, an auto e-mail will go out when a *New*, *Back on Market*, or *Price Change* has occurred within the search criteria.

No initial automatic e-mail is sent to the contact.

Any event from which your contact has selected to opt out will be indicated next to the Red **X**, along with a link to allow you to opt in the contact again.

An e-mail may be sent out to you with *unread* (never clicked in the last 90 days) automatic e-mail events to let you know which clients are not looking at their e-mails. Action will be needed to be taken in order to continue sending them. The e-mail notice will provide a link to a report in the system (*Automatic E-mails* page) that will show all

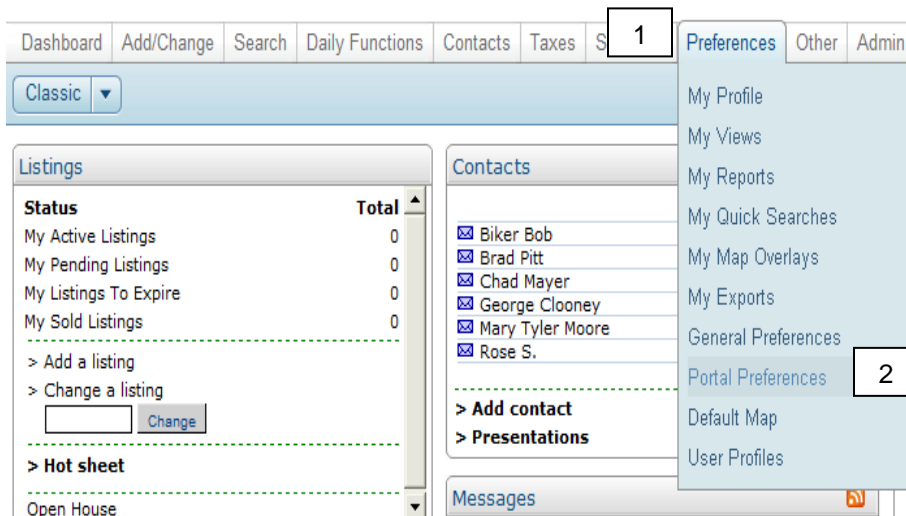
the events about to expire and allow you to extend an event. If you do not extend an event, it will expire automatically. To ease this transition, existing events will be given the full 90-day window before *unread* events begin to expire.

- Expiration of Events – Expiration does not delete the event; it just deactivates (stops sending) it. The user may extend the event even after expiration.
- Extending Events - If an event is expired or is about to expire, the Subscriber may extend the event from the Contact Management page, Contact Summary Report, Saved Searches page, or the Automatic E-mails page.

Portals

A *Portal* is a Website that allows the contact to view listings that meet their criteria. A Portal needs to be set up for each individual contact. An e-mail with a link to the *Portal* is sent to the contact after the *Portal* is turned on. Setting up your *Portal Preferences* is the first step in this process.


Portal Set Up



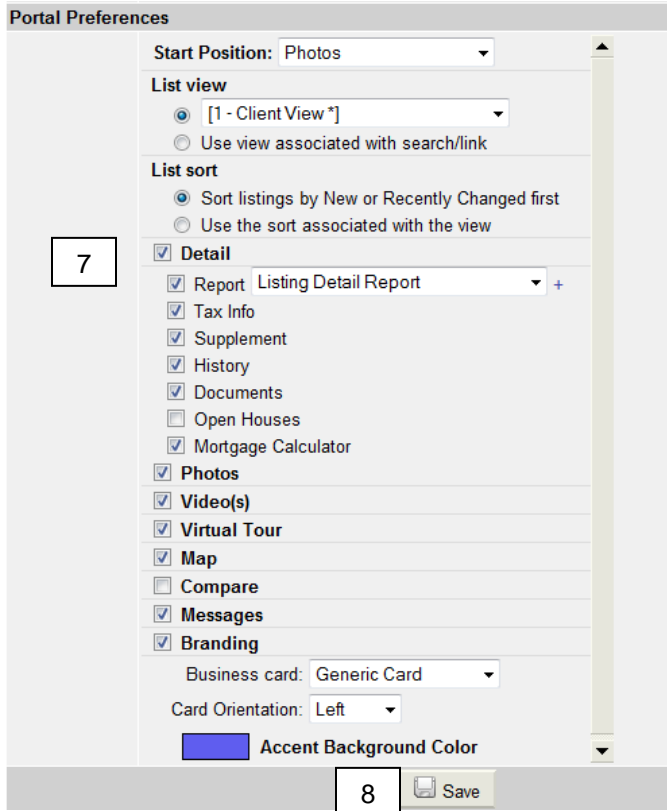
Set up your *Portal Preferences*:

1. On the Menu bar, click *Preferences*.
2. Select *Portal Preferences*.

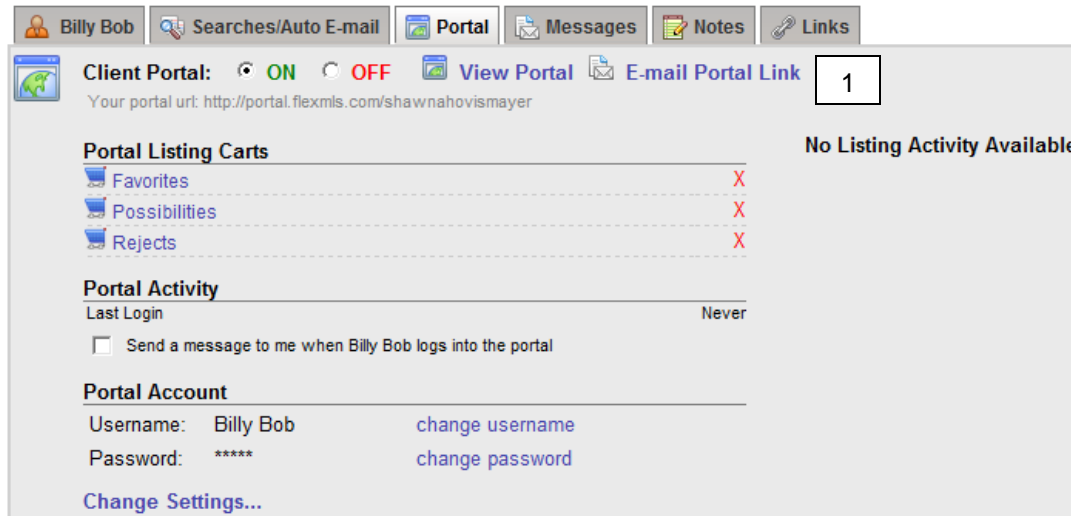
Portal Preferences

Portal	
Name:	<input type="text" value="JoTeeter"/> <input type="button" value="Suggest"/> Your portal url: http://portal.flexmls.com/JoTeeter <i>Note that this name will be used by all clients who log in to your Portal</i>
Status:	<input checked="" type="radio"/> ON <input type="radio"/> OFF
E-mail Greeting	
	<input checked="" type="checkbox"/> When Creating New Accounts, Automatically Send Email Greeting
Templates:	<input type="text"/>
Subject:	<input type="text" value="Your Portal Information"/>
Message:	<div style="border: 1px solid #ccc; padding: 5px;"><p>I've set up a customized website called a Portal for you. Using this site, you can keep track of listings, send me messages, and keep track of listings you like and dislike. Follow the link below and enter your login information to begin using your Portal. Once you are on the website, be sure to save the address as a Favorite so you can easily visit again. In the lower right panel of the Home Screen, you will be able to change your password to whatever you like.</p></div>
Business Card:	<input type="text" value="Generic Card"/> <input type="button" value="6"/>  <p>Jo Ellen Teeter Arizona Regional Multiple Listing Service, Inc. 130 S. Priest Drive Suite 101 Tempe, AZ 85281 480-303-7022 jteeter@armls.com http://armls.com</p>

3. Click the *Suggest* button. A version of your name will appear.
4. Select *ON* for status.
5. Make any necessary changes in the *Subject* line or *Message*. This default message will be used with each notification sent out and will contain the *Username* and *Password* required to enter the Portal.
6. Select your business card. This is only applicable if you have created a customized business card, otherwise the generic business card will be the default.

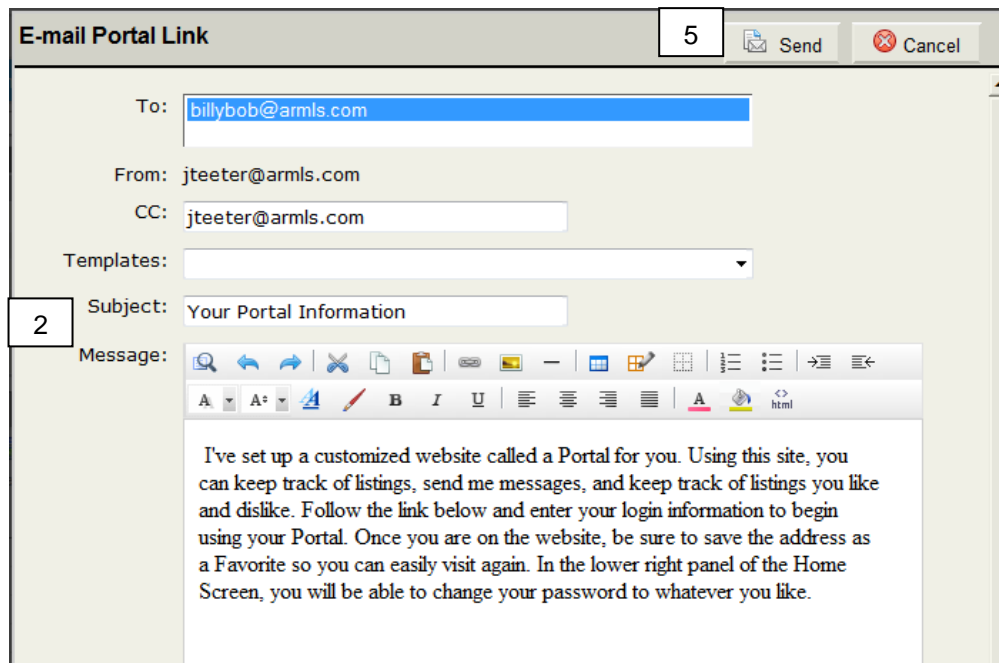


7. Choose your *Portal Preferences* by selecting the items you wish all contacts to have access to in their portal. Portal preferences for each contact can be modified as well while in the Portal tab within each individual contact file.
8. Click *Save*.



Once the portal link has been created, an e-mail will be sent to the contact inviting him/her to the Portal. The e-mail notification will include the Username and Password used to login to the Portal. To disengage the automatic notification process, uncheck the Send Notification box. You can then send a manual e-mail allowing you to edit the subject and message.

Manually E-mail Portal Link to Contact:



1. Click *E-mail Portal Link*.
2. Use the default *Subject* line and *Message* or modify them.

Business Card:

Include contact's **username**

Reset contact's **password** and include the automatically generated password

3

4 A link to your portal will be appended to your message

3. Select box by *Include contact's **username***
4. *Reset contact's password* by checking the box at the bottom OR type the password you created in the *Message*.
5. Click *Send*. (located at the top of the page)

The contact has now been sent an e-mail notifying him/her that a Portal has been set up.

Using the Portal Tab

The screenshot shows the 'Portal' tab interface for a user named Billy Bob. It includes a navigation bar with 'Portal', 'Messages', 'Notes', and 'Links'. Below the navigation bar, there are links for 'Client Portal' (ON/OFF), 'View Portal', and 'E-mail Portal Link'. The main content area is divided into two sections: 'Portal Listing Carts' and 'Listings Viewed By Billy Bob (view all...)'. The 'Portal Listing Carts' section shows a table with columns for cart type and count. The 'Listings Viewed' section shows a table with columns for MLS #, Address, and Views.

Portal Listing Carts		Listings Viewed By Billy Bob (view all...)		
Cart Type	Count	MLS #	Address	Views
Recommended	1 X	2964422	1223 W Laird ST	5
Favorites	1 X	4239938	1329 W 15th ST	3
Possibilities	3 X	4112390	815 W HOWE ST	2
Rejects	0 X	4232864	803 W ELNA RAE ST	2
		4190123	719 W 10TH ST	1

Portal Activity
Last Login: 09/01/2009 at 01:31 PM

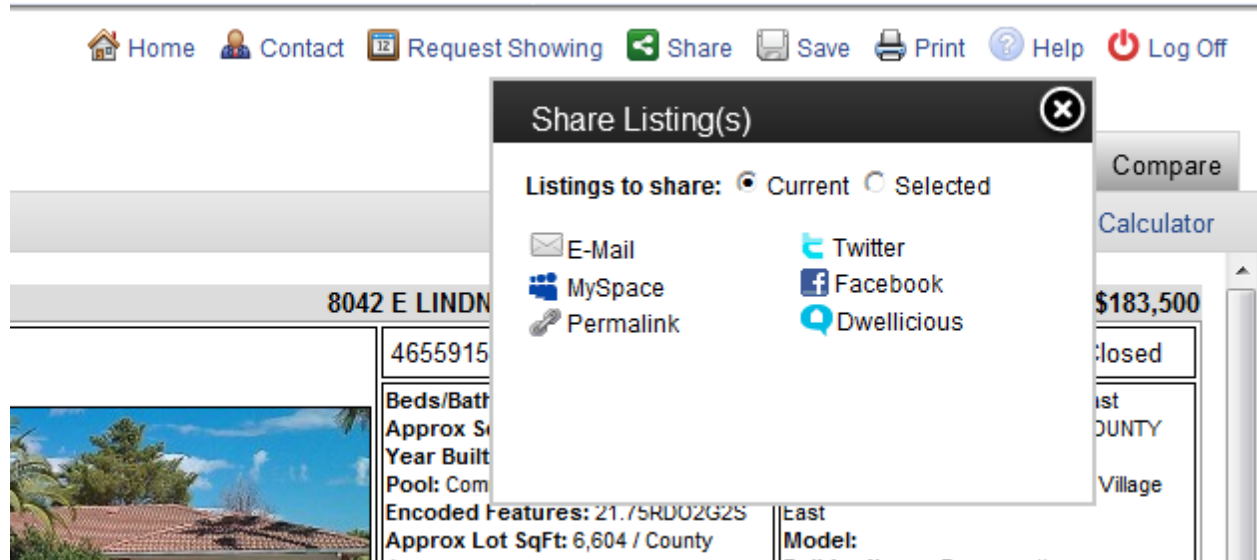
1. Once your contact has used the *Portal*, the *Portal* tab will show information about the listings that have been marked as *Recommended*, *Favorites*, *Possibilities* and *Rejects*.
2. The last time the contact logged in can be seen here.
3. To view the *Portal*, click *View Portal*.
4. To change the current settings seen in the *Portal*, click *Change Settings*.

Auto E-Mail and Portals work best when used together. When the Contact receives an update via auto e-mail, a Log In button will be provided in the right-hand corner for the Contact to sign into the *Portal*.

The last time the contact logged in can be seen here. To view the *Portal*, click *View Portal*. To change the current settings seen in the *Portal*, click *Change Settings*.

Sharing Listings from the Portal

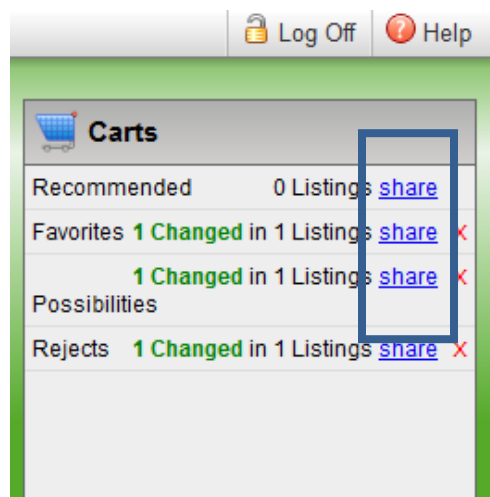
Once the contact is viewing their Portal, they can send a link containing selected listing(s) to social networking sites.



On the Search Results page of the Portal, the option to share one or more listings is available at the top right of the screen.

Click Share to select how you would like to share the listing(s). From here, the user can email, use Permalink to get a link that they can copy and paste into a variety of locations, or use one of the social networking links such as Twitter.

The share option can also be found on the Portal Dashboard where each listing cart offers a link to share the listings it contains.



Recommendations

Subscribers can make listing recommendations that appear in the Portal. If the listing is already in the search, the Subscriber can mark it and change it from a grey to a blue star.

The screenshot shows a user interface for a real estate portal. At the top, there is a navigation bar with tabs: "Billy Bob Buyer", "Searches/Auto E-mail" (highlighted with a box labeled '1'), "Portal", "Messages", "Notes", and "Links". Below the navigation bar, there are two main sections: "Searches" and "Results".


The "Searches" section on the left has a list of searches: "Park Area" (highlighted with a box labeled '2') and "The Lakes". Below the list are buttons for "Add", "Rename", "Edit", and "Remove".

The "Results" section on the right has a "View Totals" link. Below it, there are four links: "View all" (highlighted with a box labeled '3'), "View new in the last 24 hours", "View new since 12/17/2008 08:40 AM", and "Reset time and view new since 12/17/2008 08:40 AM".

Below the "Results" section, there is an "Auto E-mail" section with a "Add an Auto E-mail" button and a list of email events for "Billy Bob Buyer" with the email address "billybob@billybob.com".

At the bottom, there is a "Search Parameters" section with text: "Property type Residential; # Bedrooms between 4 and 99; City/Town Code like tempe; Dwelling Type of 'Single Family - Detached'; List Price between 200000 and 250000; Status of 'Active':. New results include".

Make a listing recommendation:

1. Click *Searches/Auto E-Mail* tab.
2. Highlight name of *Search*.
3. Click *View All*.
4. Click  star of the *Recommended* listing (see screen shot below).

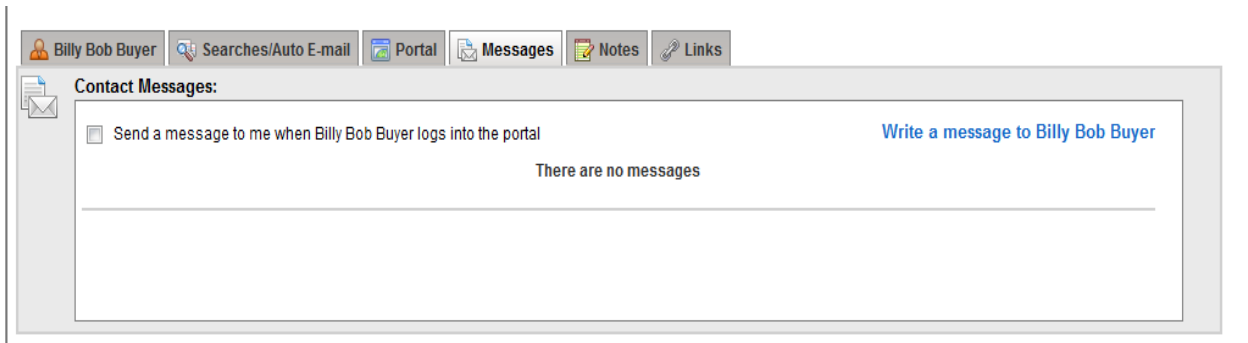
The screenshot shows a search results page titled "Park Area for Billy Bob Buyer". At the top, there is a navigation bar with a "1" in a box. Below the navigation bar, there is a "Results: 41" and "Selected: 0" indicator. The main content is a table of search results.

Price	Status	List #	Property Type	Map Code/Grid	Subdivision	BD	BA	Approx SQFT
\$200,000	Active	4029177	Residential	R36	Roosen Heights	4	2	1,478
\$200,000	Active	4040937	Residential	R37	Hughes Acres 7	4	2	1,625

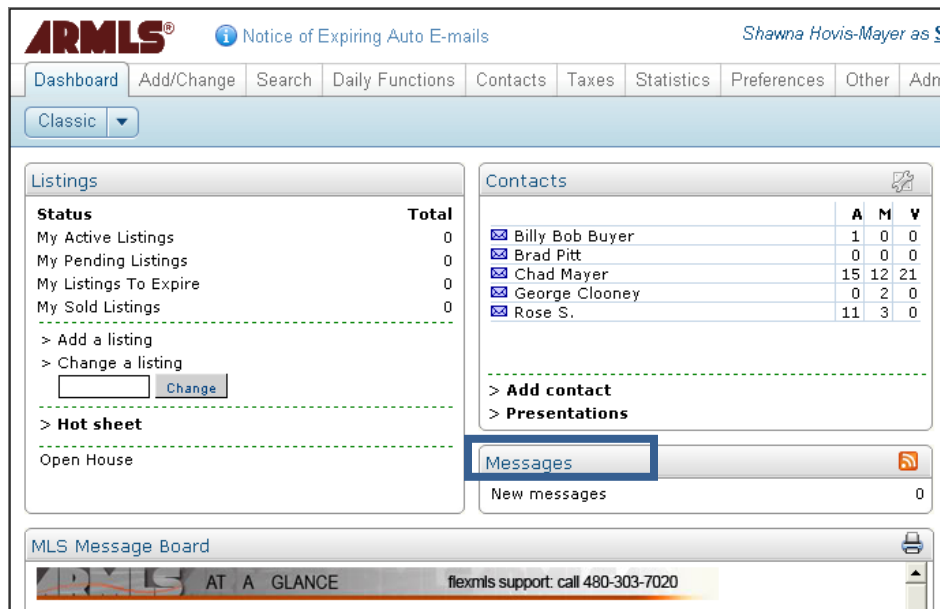
The first row of the table is highlighted in yellow. A box labeled '4' is placed over the star icon in the "List #" column of the first row.

Messages

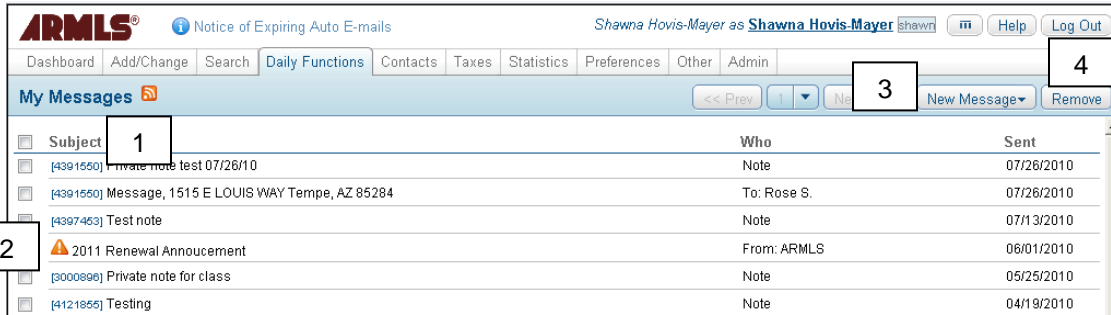
The *Messages* tab displays all messages sent to and received from the contact. Click to expand a message or reply to messages from your clients. Click *Write a Message* to send a message to your contact.



Messages to the contact will appear in their *Portal* on the *Home* page as well as on the *Messages* tab in the listing itself. Messages from the contact written to the agent will appear on both the *Dashboard* as well as in the *Messages* tab.



To view all of your saved messages on the classic Dashboard, click on the blue Messages link in the Messages pane.



1. To view a message click on the name of the message in the Subject column area.
2. Messages with the orange triangle are announcements from ARMLS and cannot be deleted.
3. To start a new message from this screen, click on *New Message*.
4. To delete a message, select the box next to the message and click on the *Remove* button in the right hand corner.

Messaging: Enable e-mail notifications for:

Messages sent only to me

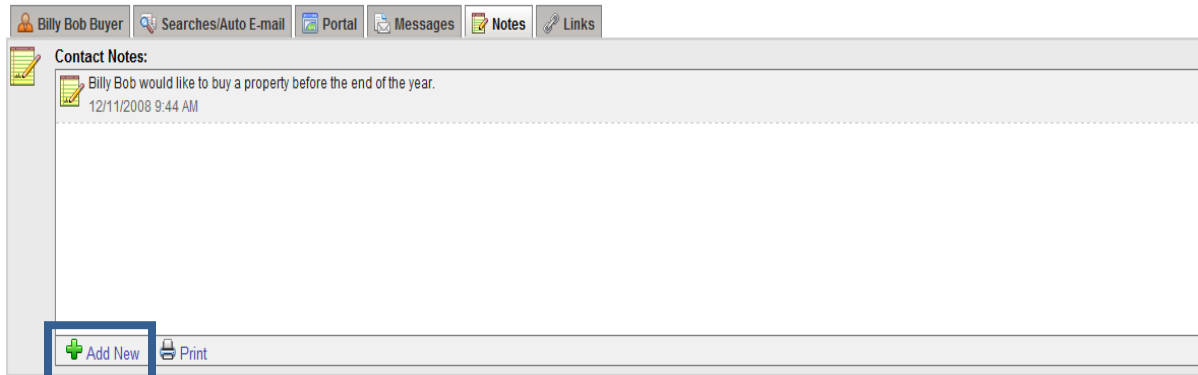
Office broadcast messages

Association broadcast messages

MLS broadcast messages

The messages from your client can appear in your Internet based e-mail account, depending on the settings selected on the *General Preferences* screen. To check your settings, go to *Preferences*, then *General Preferences*. Scroll down to the *Messaging: Enable e-mail modifications for:* section and select *Messages sent only to me*. Other options to receive e-mail notification are available in this section as well; just select the box (es).

Notes



Information about the contact may be entered in the *Notes* tab. To begin a note, click *Add New* and type a note in the text field. Once complete, click *Save Note*, these notes are only seen by the Subscriber and remain on the *Notes* tab in *Contact Management*.

Links

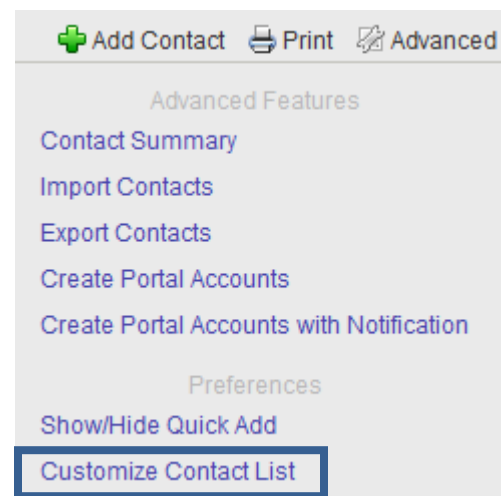
On the *Links* tab, view all active links of both auto e-mails and manual e-mails that have been sent to the contact. These links are also displayed on the *Portal*, if turned on. To remove the links, click the red **X** at the end of the row.

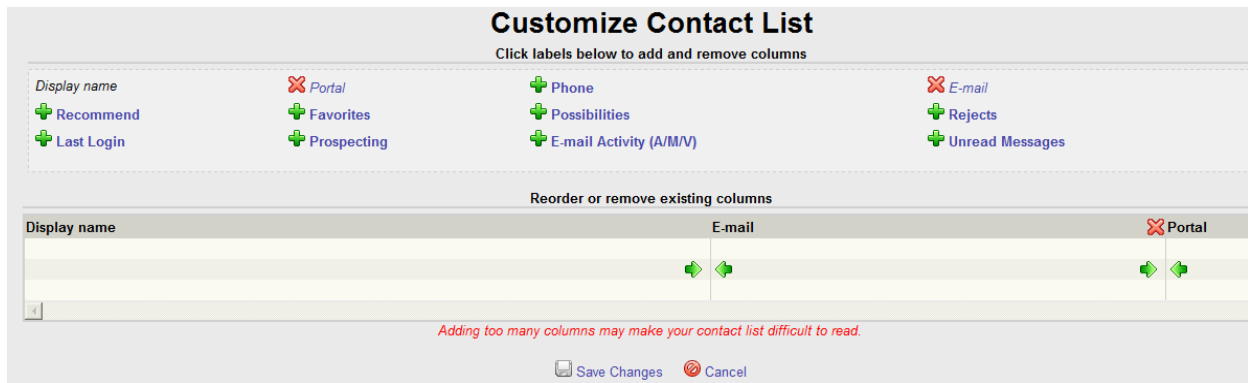
Customize Contact List

Customize the *Contact List* to display which columns appear in the list on the Contact Management page. The *Contact List* can include additional columns to show whether the contact has a Portal, the date/time of their last login, and their *Favorites*, *Possibilities* and *Rejects*.

Customize the Contact List:

1. Start on the *Contact Management* screen.
2. Click *Advanced* and select *Customize Contact List*.





On the *Customize Contact List* screen, Labels are used to insert columns on the *Contact Management* screen. Examples of labels are *Recommend*, *Last Login*, and *E-mail Activity (A/M/V)*. Each will reflect the latest client activity.

To include a Label in your Contact List, click the appropriate green plus sign. Once the label is selected, the green plus sign will change to a red **X**. The label will be entered into the *Reorder or remove existing columns* area. This area shows a preview of how the Contact List labels will change. In the example below, the *Recommend* label was selected in addition to the defaults of *Portal*, *Phone* and *E-mail*.



To remove a *Label*, click the red **X**. It will change back to a green plus sign and be removed from the *Reorder or remove existing columns* area. Once all changes are complete, click *Save Changes*. The *Contact List* should now reflect the changes made.

Display Name	Recommend	Portal	E-mail
Adam Saunders	0	OFF	funnyguy@saunders.com
Austin Powers	0	OFF	thatguy@mojo.com

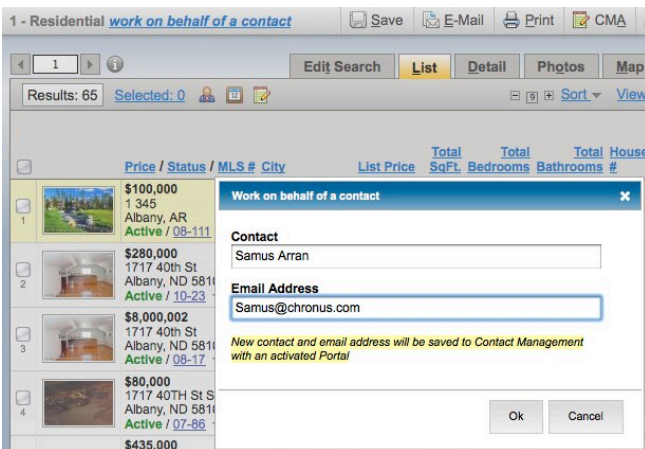
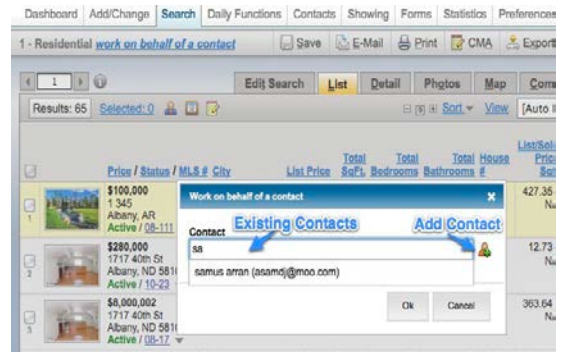
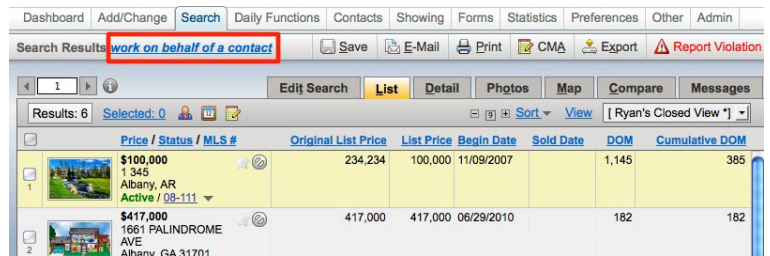
Listing Carts/Search Results Enhancements

On Monday, January 10, 2011, FBS installed new features in flexmls® Web. These changes were made in an effort to make Listing Carts and Portals more manageable for both Agents and their Clients. Agents can now make recommendations to the client Portals as well as remove (hide) listings from the search results list and listing carts. In addition, moving listings in and out of listing carts is simpler.

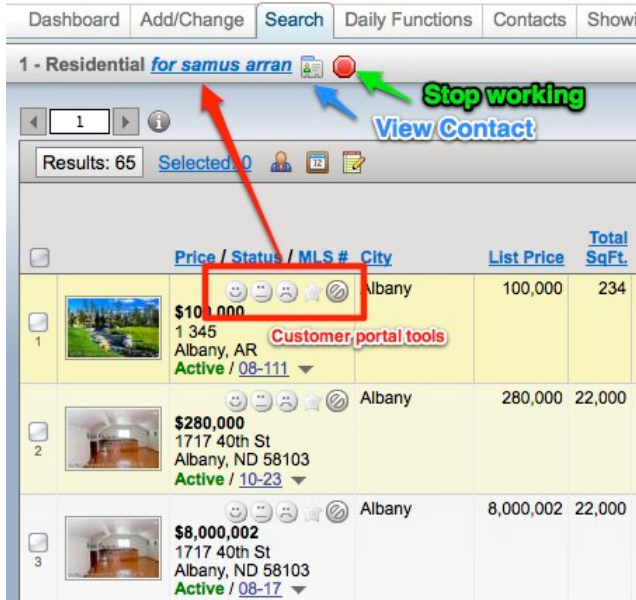
Work on Behalf of Someone

Once only possible to achieve through Contact Management, you may now apply Favorites, Possibilities, Rejects, and Agent Recommended listings for your Portal customers from any search results page with the **Work on behalf of a contact** feature. Clicking this feature allows you to select a client for whom to denote listings as Favorites, Possibilities, Rejects, and Agent Recommended.

Selecting **work on behalf of contact** will display the following prompt to choose or add a new contact.



If you click the **Add Contact** icon, you will be prompted to enter your contact's name and e-mail address. Clicking **OK** will create a new contact and a portal for them. The portal login and link is NOT sent automatically to the client. The password will need to be manually set and the portal link emailed from the Contact Management page.

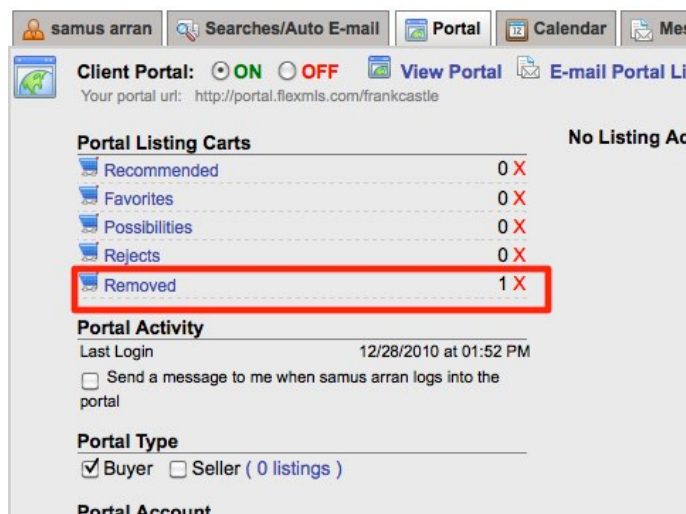
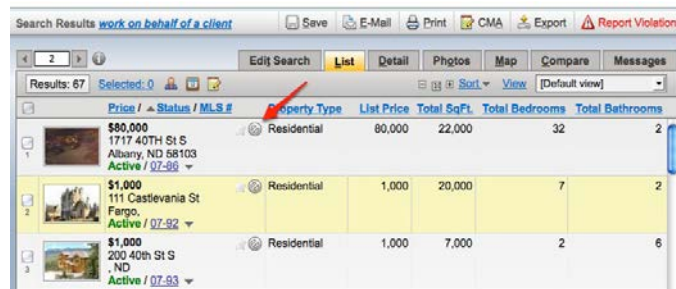


Once you have chosen or created a contact, your search results page will change to display the client's name in the top-left. Client portal tools, now next to the MLS number, will allow you to designate listings as Favorites, Possibilities, Rejects, or Agent Recommended, even if the search is not added to the client portal.

Stop working [on behalf of some]: Clicking this icon will unlink your current display of listings from the contact you previously selected.

Remove Listings from a Portal

Along with the normal portal icons, a new icon was added to allow you to remove (or hide) a listing from appearing in your clients' portal search results and listing carts.



As a result, a Removed cart will be added to your client's portal and will allow you and/or your client to review the listings that were marked as *Removed*. This feature will appear in Contact Management on the Portal tab (for the Agent) and within your client's portal (for the client). Please note that the client does not have the option to denote listings as Removed, but does have the ability to select items from the Removed cart and save them as Favorites, Possibilities or Rejects. This is by design so in the event a client does not agree with a Removal, they

can move listings to their desired carts.

Notes: