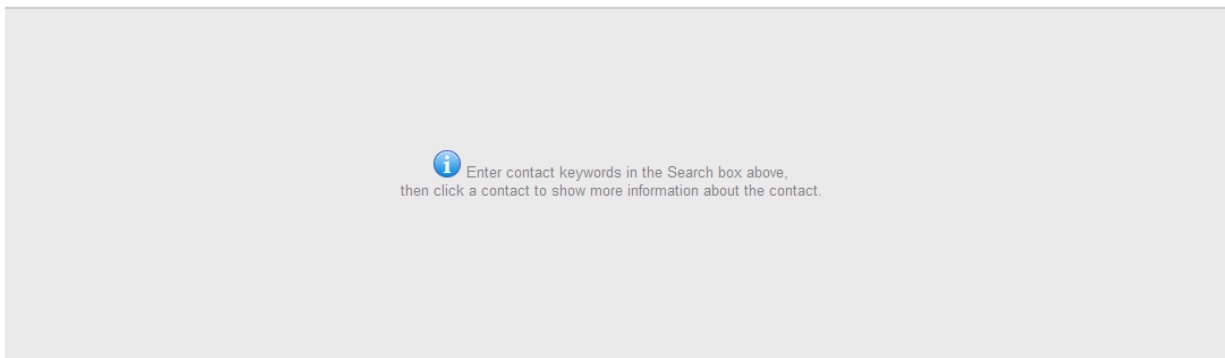
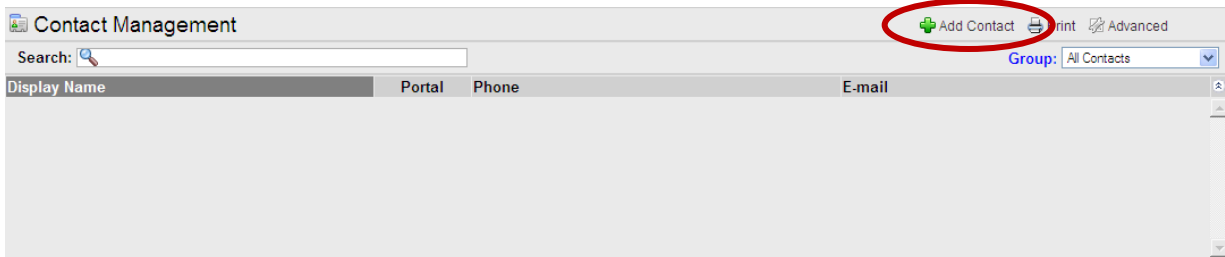


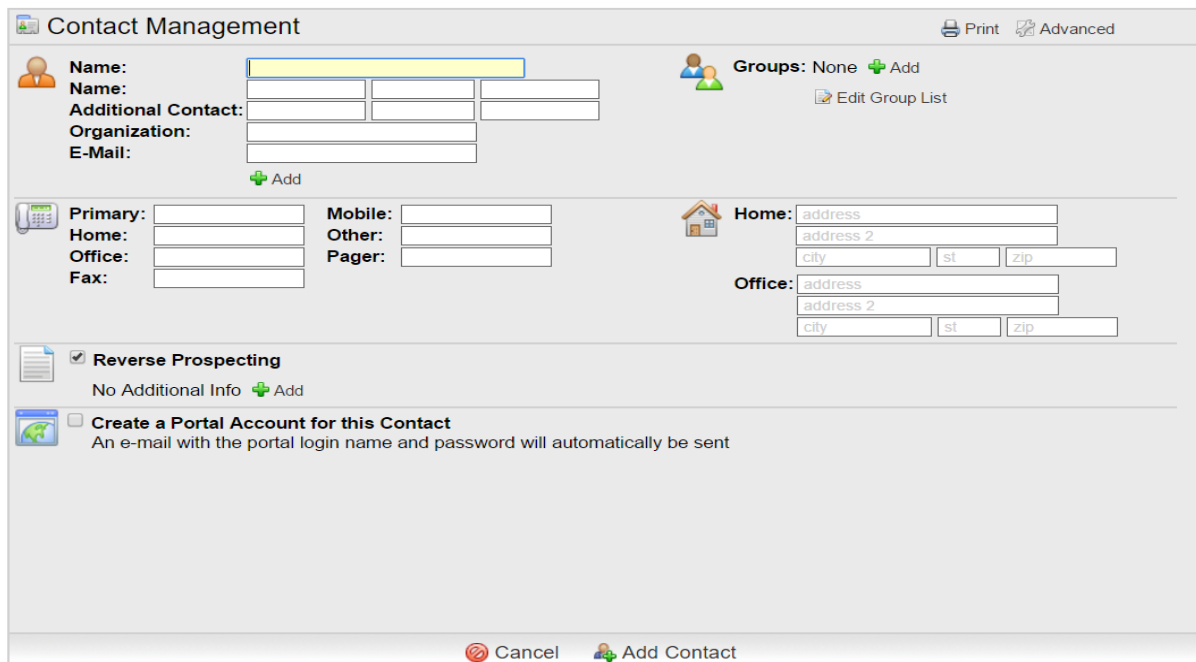
# Contacts and Subscriptions

## Step 1: Adding a Contact

To get started, in the Main Menu tree, click Contacts > Contact Mgmt. This will bring you to the following screen:



To add a contact, click the **Add Contact** button on the upper right side of the screen. At the next screen, you will be able to enter basic information for your contact, such as their name, spouse's name, phone numbers, e-mail addresses, and physical addresses.



The screenshot shows the 'Add Contact' form. It includes fields for Name, Additional Contact, Organization, E-Mail, Primary, Home, Office, Mobile, Other, Payer, and Fax. There are also checkboxes for 'Reverse Prospecting' and 'Create a Portal Account for this Contact'. The 'Add Contact' button is highlighted at the bottom.

**Name:** [text box]  
**Name:** [text box] [text box] [text box]  
**Additional Contact:** [text box] [text box] [text box]  
**Organization:** [text box]  
**E-Mail:** [text box] [Add](#)

**Primary:** [text box] **Mobile:** [text box]  
**Home:** [text box] **Other:** [text box]  
**Office:** [text box] **Payer:** [text box]  
**Fax:** [text box]

**Home:** [text box]  
[text box]  
[text box] [text box] [text box]  
**Office:** [text box]  
[text box]  
[text box] [text box] [text box]

**Reverse Prospecting**  
No Additional Info [Add](#)

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

[Cancel](#) [Add Contact](#)

The Display Name is the ID you give your Contact that will show in your list of clients in Contact Management. This name is seen only by you and identifies your client to you. After you have entered all desired information on this screen, click the **Add Contact** button at the bottom of the screen.

**Contact Management** Print Advanced

**Name:** Contact ID Groups: None + Add

**Name:** Firstname Lastname Edit Group List

**Additional Contact:**

**Organization:**

**E-Mail:** contact@email.com  
 secondemail@email.com  Notify  + Add

**Primary:** 4141111111 **Mobile:** 4141111111 **Home:** 123 Sesame Street  
 Home: 4142222222 **Other:** 4143333333 address 2  
 Office: 4144444444 **Pager:**  Wauwatosa WI 53226  
 Fax: 4145555555 **Office:** 123 Fantasy Island  
 address 2  
 Wauwatosa WI 53226

**Reverse Prospecting**  
 Additional Info: Position CEO BohemianHouse Productions LLC + Add

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

Cancel  **Add Contact**

To add additional e-mail addresses, click the **Add** button, enter the e-mail address in the additional field, and then check **Notify**.

Once your Contact has been added into *FlexMLS*, your screen will look similar to the screen below:

**Contact Management** Add Contact Print Advanced

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

Search:  Group: All Contacts

Name	E-mail	Phone	Portal	Last Login	Recommend	Saved	Hidden by Consumer	Hidden by Me
Contact ID	contact@email.com	4141111111	OFF	never	0	0	0	0
Delayed Status Change Only	bhousemlm01@att.net		OFF	never	0	0	0	0
Marva Myles	marva.b@att.net		OFF	never	0	0	0	0
Portal Contact	achancellor@excite.com		ON	never	0	0	0	0

**Contact ID** Searches/Subscriptions Portal Messages Notes Listing Notes Links

**Lastname, Firstname** Group: None

**E-mail** Last Subscription E-mail Activity Status Action

contact@email.com Send Confirmation E-mail

secondemail@email.com Send Confirmation E-mail

**Primary:** 4141111111 **Mobile:** 4141111111 **Home:** 123 Sesame Street, Wauwatosa, WI 53226  
 Home: 4142222222 **Other:** 4143333333 **Office:** 123 Fantasy Island, Wauwatosa, WI 53226  
 Office: 4144444444 **Pager:**   
 Fax: 4145555555

**Reverse Prospecting:** Enabled **E-mail Activity:** Manual: 0, Viewed: 0  
**Total Activity:** Manual: 0, Viewed: 0

**Position:** CEO BohemianHouse Productions LLC

**Edit Contact**  Remove  Deactivate  Transfer

At this point, you can add other information, such as attaching searches, notes, etc. If you need to change existing information, click the **Edit Contact** button at the bottom of the page.

### Step 2: Adding a Search

To add the search to the Contact, click the **Searches/Subscriptions** tab. Under the Searches box, click the **Add** button.

The screenshot shows the 'Contact Management' interface. At the top, there are fields for 'Quick Add: First Name', 'Last Name', and 'E-mail', along with 'Portal' and 'Add' buttons. Below this is a search bar and a 'Group' dropdown set to 'All Contacts'. A table lists contacts with columns for Name, E-mail, Phone, Portal, Last Login, Recommend, Saved, Hidden by Consumer, and Hidden by Me. The 'Searches/Subscriptions' tab is selected and highlighted with a red box. Below the tab, there are sections for 'Searches' and 'Results'. The 'Searches' section has an 'Add' button highlighted with a red box and an arrow. Other buttons include 'Rename', 'Edit', and 'Remove'. Below the 'Searches' section are 'View' and 'Listing Activity Report' options.

The following pop-up box, labeled 'Attach Saved Search' will appear. Click the **Create New Full Search** button.

The 'Attach Saved Search' dialog box asks 'Which searches would you like to attach to this contact?'. It contains a list of search titles: 'Cudahy Condos Hotsheet', 'Milwaukee Condo Sold and Expired solds', 'SF Wau Hotsheet', 'Tosa SF Hotsheet', 'VL OZA Hotsheet', and 'Waukesha Co. Lake Properties'. At the bottom, there are three buttons: 'Create New Quick Search...', 'Create New Full Search...' (highlighted with a red box), and 'Attach Search(es)'. A 'Cancel' button is also present.

**NOTE:** If you do not receive this pop-up box, and are taken to the 'Available Quick Searches' screen, click on Full Search under the Search menu in the Main Menu tree; select Single Family and Active, and then click the **Next** button. At the next screen, in the upper right corner, click the **Save** link. This will take you to the Save Search screen. In the 'Search Name' field, type in 'test'; click the **Finish** button at the bottom. Now, return to Contact Management to your Contact's Searches/Subscriptions tab. Clicking the **Add** button will now get the pop-up Attach Saved Search box.

After clicking the **Create New Full Search** button, you will come into Full Search. Start by selecting your desired property type and status and click the **Next** button. Select all of your desired parameters to save to the search, and then click the **Save Search** button.

[Return to Contact Management](#)

### Full Search

Single-Family Results: 16  
[Update](#) | [Clear All](#) | [Save](#) | [View Results](#)

Main	Exterior	Dates	Interior	Taxes	Address/School	Other	Rooms	Office/Member	Map	Summary
<input checked="" type="checkbox"/> Status		<input type="checkbox"/> List Price		<input checked="" type="checkbox"/> County				<input checked="" type="checkbox"/> Municipality		
<input type="checkbox"/> Total Bathrooms		<input type="checkbox"/> Sold Price		<input type="checkbox"/> Garage Spaces			<input checked="" type="checkbox"/> Bedrooms	<input type="checkbox"/> Garage Type		
<input type="checkbox"/> Body of Water		<input type="checkbox"/> Subdivision		<input type="checkbox"/> School District						
<input type="checkbox"/> Street Name										

**Save Search**

This will take you to the Save Search screen. This is where you give your search a name by typing it in the 'Search Name' field.

### Save Search

Save Type:  New  Existing  Mark as Favorite

Search Name:  
contact search name

Search Description:

What view do you wish to associate with this search?  

Single Family

Note that if you remove the selected view, this search will be removed.

**+ Additional Search Options**

Angela Washington-Marshall  
Barkleys  
BBaby  
Contact ID (no portal)  
Delayed Status Change Only (no portal)  
Marva Myles

**This prospect does not have a portal account. You can create one below.**

Enabled:  ON  OFF

Username:

Password:

Confirm:  [generate password](#)

Create

Send my default notification to this user with their username and password.

Save and Return to Contact Management

You can also select the desired events you would like the search to capture and send, by clicking the **Additional Search Options** link. This will open the event selections for you to choose. By default, New, Price Change, and Back on Market are selected by default.

**IMPORTANT:** If you would like for your search to capture listings that change from Delayed to Active, select Status Change.

### - Additional Search Options

**Contact:** Barkleys

angela  
Angela Washington-Marshall  
Barkleys  
delayed  
Daffy Duck  
Delayed

What events define a listing as **New** for this search?

- |  |  |                                     |
|--|--|-------------------------------------|
| <input checked="" type="checkbox"/> New          | <input checked="" type="checkbox"/> Back on market | <input type="checkbox"/> Extension  |
| <input checked="" type="checkbox"/> Price change | <input type="checkbox"/> Status change             | <input type="checkbox"/> Open House |
- [Prospect Events](#) [All Events](#) [No Events](#)

Once you have completed your selections, click the **Save and Return to Contact Management** button.

### Step 3: Adding the Subscription

Once you have returned to Contact Management, you can now create the subscription for that search. After saving your search, you should have returned to your Contact's Searches / Subscriptions tab. On this screen, click the **Add a Subscription** link, located on the right side of the screen.

The screenshot displays the 'Contact Management' interface. At the top, there are fields for 'Quick Add: 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 Name, E-mail, Phone, Portal, Last Login, Recommend, Saved, Hidden by Consumer, and Hidden by Me. The 'Portal' column shows 'OFF' for most contacts and 'ON' for 'Portal Contact'. Below the table is a navigation bar with tabs for 'Contact ID', 'Searches/Subscriptions', 'Portal', 'Messages', 'Notes', 'Listing Notes', and 'Links'. The 'Searches/Subscriptions' tab is active, showing a search for 'contact search name'. The 'Results' section includes links for 'View all', 'View new in the last 24 hours', 'View new since 01/03/2016 10:13 AM', and 'Reset time and view new since 01/03/2016 10:13 AM'. The 'Subscriptions' section features a red-bordered button labeled '+ Add a Subscription'. Below this is the 'Search Parameters' section, which includes the text: 'Property type Single-Family; Status of 'Active'.; New results include new listings, back on market, and price changes.' At the bottom, there are sections for 'View' (Single Family) and 'Listing Activity Report'.

Name	E-mail	Phone	Portal	Last Login	Recommend	Saved	Hidden by Consumer	Hidden by Me
Contact ID	contact@email.com	4141111111	OFF	never	0	0	0	0
Delayed Status Change Only	bhousem01@att.net		OFF	never	0	0	0	0
Marva Myles	marva.b@att.net		OFF	never	0	0	0	0
Portal Contact	achancellor@excite.com		ON	never	0	0	0	0

This will take you to the 'Edit Subscription' screen. Once here, select the desired e-mail schedule (Weekly, Monthly, ASAP, or Continuous), your desired view to send, and enter a subject for your subscription event. If desired, enter a note in the body of the e-mail field. Keep in mind this note will go out with every automatic e-mail sent for this event. Once finished, click the **Next** button.

## Edit Subscription

**General Subscription Options**

Subscription name:

Preview Mode:

Send notification of new listings to:

Off  On

You (sender)  Selected contacts

Send me an email when a contact clicks the link

Contacts:

---

**Schedule:** Please choose a schedule for this subscription

Weekly:  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday | [Clear days](#)

Monthly: 1st day of each month

ASAP

Continuous

E-mail Schedules

---

**View to send**

Select a view to send

**Single Family:**  
Status, Postal Municipality, List Price, Address, Bedrooms, Total Bathrooms, Garage Spaces, Garage Type, Est. Total Sq. Ft., Property Type

---

**E-mail content**

Templates: You currently have no saved email templates

Subject:

Body:

HTML

Text

Enter a subject and if desired, a note

---

### *Step 4: Manually E-mail Initial Listings (optional)*

After you have completed creating the subscription, you will return to Contact Management to your Contact's Searches/Subscriptions tab. From here, you have the option to manually e-mail the initial listings found when you defined the Contact's search to save for the subscription. After you have created the subscription, an opt-in request will be sent to that contact's email address(es); they need to opt-in to the subscription in order to receive the listing updates automatically, and their email address(es) will remain in a Pending status until they do so. The new and updated listings for that search will be sent out from that point forward. If you would like for your Contact to receive the initial set of listings, those must be manually e-mailed.

To manually e-mail those listings, on the Contact's Searches/Subscriptions tab, click the **View All** link. This will open those listings in the Search Results screen.

**Contact Management** + Add Contact Print Advanced

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

Search:  Group: All Contacts

Name	E-mail	Phone	Portal	Last Login	Recommend	Saved	Hidden by Consumer	Hidden by Me
Contact ID	contact@email.com	4141111111	OFF	never	0	0	0	0
Delayed Status Change Only	bhousemlm01@att.net		OFF	never	0	0	0	0
Marva Myles	marva.b@att.net		OFF	never	0	0	0	0
Portal Contact	achancellor@excite.com		ON	never	0	0	0	0

**Contact ID** **Searches/Subscriptions** **Portal** **Messages** **Notes** **Listing Notes** **Links**

**Searches**

contact search name

+ Add 📄 Rename 📄 Edit ✖ Remove

**View**  
Single Family

**Listing Activity Report**

**Results**  View Totals

[View all](#)

[View new in the last 24 hours](#)

[View new since 01/03/2016 10:21 AM](#)

[Reset time and view new since 01/03/2016 10:21 AM](#)

**Subscriptions**

Subscription Contact ID  
contact@email.com (Pending), secondemail@email.com ✖

**Search Parameters**  
Property type Single-Family; Status of 'Active': New results include new listings, back on market, and price changes.

Once you are at the Search Results screen, you can select your desired listings to e-mail and click the **E-mail** button in the upper right side of the screen.

[Return to Contact Management](#)

contact search name *work on behalf of a contact*  Save 📧 E-Mail Print CMA Export

Edit Search List Detail Photos Map Compare Messages

Results: 8 Selected: 0 - 10 + Sort View [Single Family \*]

	Price   Status   MLS #	Postal Municipality	List Price	Bedrooms	Total Bathrooms	G Garage Spaces Type	Est. Total Sq. Ft.	Property Type
	<b>\$589,900</b> 32580 W Esker LN Chenequa, WI 53058-9728 <span style="color: green;">Active</span> / 1441484	Nashotah	589,900	4	4	2.5 A	3,525	Single-Family
	<b>\$639,000</b> 6075 N Oakland Hills RD Chenequa, WI 53058-9731 <span style="color: green;">Active</span> / 1417823	Nashotah	639,000	3	4	4 A	3,417	Single-Family

Once you are in the 'Listings to E-mail' screen, select the options you would like to include with the listings in the left side blue-shaded panel. The options correspond to the tab details on the Search Results screen.



Select your Contact from the 'To: Choose from the list' box. If you would like to preview what the e-mail would look like before you send it, click the **Preview** button. To e-mail the listings, click the **E-mail** button.

[Return to Contact Management](#)

[Return to Search Results](#)

### Listings to E-Mail

Current Listing (1)  
 Selected (0)  
 All Results (8)

Start Position: Default ▾

Version: Public ▾

View: [Single Family \*] ▾

Detail

Full Report Addtl Photos ▾ +

History

Documents

Open Houses

Mortgage Calculator

Photos

Video(s)

Virtual Tour

Map

Compare

Branding

Card Orientation: Top ▾

Accent Background Color

### Recipients

Page: Listings

From: awm050501@yahoo.com [primary] ▾

To: Choose from the list or [Add New](#):

- Angela Washington-Marshall
- Barkleys <awmmlm@gmail.com>
- Barkleys <achancellor@excite.com>
- BBaby
- Contact ID <contact@email.com>
- Contact ID <secondemail@email.com>
- Delayed Status Change Only
- Marva Myles

1 contact selected

You may also enter one or more additional e-mail addresses below:

Send a copy to me

Notify me the first time the recipient views this page

Cc:

Options:  Send mail using my computer's e-mail program  
(ex. Microsoft Outlook, Mozilla Thunderbird)

### E-mail personal message to recipient

Templates: You currently have no saved email templates

[Save as New](#)

Subject: Listings

Message body:

HTML

Text

[Save / Reset Selections](#)