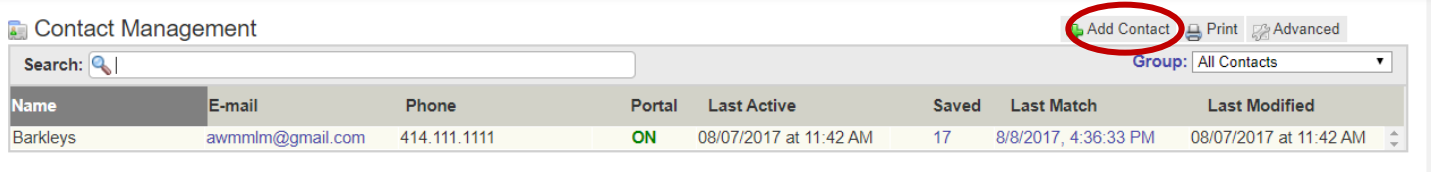


Adding Contacts and Subscriptions

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.



Contact Management

Search:

Group: All Contacts

Name	E-mail	Phone	Portal	Last Active	Saved	Last Match	Last Modified
Barkleys	awmmlm@gmail.com	414.111.1111	ON	08/07/2017 at 11:42 AM	17	8/8/2017, 4:36:33 PM	08/07/2017 at 11:42 AM

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. After you have entered all desired information on this screen, click the **Add Contact** button at the bottom of the screen.

Add Contact

Name:

Name:

Additional Contact:

Organization:

E-Mail:

Groups: None

Primary: **Mobile:**

Home: **Other:**

Office: **Pager:**

Fax:

Home: address
address 2
city st zip

Office: address
address 2
city st zip

Reverse Prospecting
No Additional Info

Create a Portal Account for this Contact
An invite with the portal login name and password will automatically be sent

CANCEL

Step 2: Adding a Search

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

Barkleys

[CONTACT DETAILS](#) **SEARCHES/SUBSCRIPTIONS** [PORTAL](#) [MESSAGES](#) [NOTES](#) [LISTING NOTES](#) [LINKS](#)



Searches

- elm grove sf
 - met NOT quick
 - Milwaukee Communities
 - open house
 - Tosa Condos
 - Tosa SF
 - wirex test
 - Waukesha SF
- + 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 07/12/2017 12:05 PM	-
Reset time and view new since 07/12/2017 12:05 PM	-

Subscriptions

[+ Add a Subscription](#)

Search Parameters

Property type Single-Family; Bedrooms between 3 and 999999999999; Municipality of 'Elm Grove'; Status of 'Active', 'Delayed'; Basement of Full; and not Contingent of 'With Offer'; New results include new listings, price changes, and status changes.

[EDIT CONTACT](#)

[REMOVE](#)

[DEACTIVATE](#)

[TRANSFER](#)

[CLOSE](#)

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

Attach Saved Search

Which searches would you like to attach to this contact?

- 53207
- Delayed Hotsheet
- Lake Properties
- Manitowoc Hot Sheet SF & VL
- SF Lake Country Water Front/Access
- ucshjkchzx
- Washington Heights - DO NOT DELETE

[Create New Quick Search...](#)

[Create New Full Search...](#)

[Cancel](#)

[Attach Search\(es\)](#)

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

Status: Active (Delayed, Pending, Sold, Expired) See All and Select Date Ranges

County: Marinette (Marquette, Marquette, McHenry, Menominee, Milwaukee)

Municipality: River Hills (Shorewood, South Milwaukee, St. Francis, Wauwatosa)

List Price: 0 to 9999999999

Sold Price: 0 to 9999999999

Bedrooms: 3 to 4

Total Bathrooms: 2.5 to 9999

Garage Spaces: 2.4 to 9999999999

Garage Type: Attached (Detached, None)

Body of Water:

Subdivision:

School District: Abbotsford (Adams-Friendship Area, Albany)

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. Once complete, click the **Save and Return to Contact Management** button.

Save Search

Save Type: New Existing

Mark as Favorite

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

Contact: Barkleys

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

- New Price Change Open House
 Back On Market Extension Status Change All Events No Events

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 link. On this screen, click the **Add a Subscription** link, located on the right side of the screen.

Barkleys

[CONTACT DETAILS](#) [SEARCHES/SUBSCRIPTIONS](#) [PORTAL](#) [MESSAGES](#) [NOTES](#) [LISTING NOTES](#) [LINKS](#)



Searches

- elm grove sf
- met NOT quick
- Milwaukee Communities
- open house
- Tosa Condos
- Tosa SF
- wirex test
- Waukesha SF

[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 07/12/2017 12:05 PM	-
Reset time and view new since 07/12/2017 12:05 PM	-

Subscriptions

[+ Add a Subscription](#)

Search Parameters

Property type Single-Family; Bedrooms between 3 and 999999999999; Municipality of 'Elm Grove'; Status of 'Active', 'Delayed'; Basement of Full; and not Contingent of 'With Offer'.; New results include new listings, price changes, and status changes.

[EDIT CONTACT](#)

[REMOVE](#)

[DEACTIVATE](#)

[TRANSFER](#)

[CLOSE](#)

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 **Save** button at the bottom of the screen.

Edit Subscription

General Subscription Options

Subscription name: Subscription Barkleys 2

Send notification of new listings to:

- You (sender) Selected contacts
- Send me an email when a contact clicks the link
- Enable Preview Mode

Contacts: | w. Barkleys | [Add New Contact](#)

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

View to send: Single Family

Single Family; Status: Portal; Municipality: List Price, Address, Bedrooms, Full Baths, Half Baths, Garage Spaces, Garage Type, Est. Total Sq. Ft., Property Type

E-mail content

Templates: You currently have no saved email templates

[Save as New](#)

Subject: New Listings

Body: [Rich Text Editor]

[Save](#)

Step 4: Send Manual Email (optional)

If you would like for your Contact to receive the listings that are currently in the search, you must manually email those; the Subscription will send listings that are new/updated **from the moment** the Subscription is created.

Once you have returned to Contact Management after saving your Subscription, under Results, click the **View All** link.

Barkleys

[CONTACT DETAILS](#) [SEARCHES/SUBSCRIPTIONS](#) [PORTAL](#) [MESSAGES](#) [NOTES](#) [LISTING NOTES](#) [LINKS](#)



Searches

- elm grove sf
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- [+ 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 07/12/2017 12:05 PM](#)
- [Reset time and view new since 07/12/2017 12:05 PM](#)

Subscriptions

Subscription Barkleys 2
awmmlm@gmail.com

Search Parameters

Property type Single-Family; Bedrooms between 3 and 999999999999; Municipality of 'Elm Grove'; Status of 'Active', 'Delayed'; Basement of Full; and not Contingent of 'With Offer'.; New results include new listings, price changes, and status changes.

[EDIT CONTACT](#)

[REMOVE](#)

[DEACTIVATE](#)

[TRANSFER](#)

[CLOSE](#)

Once you are at the Search Results screen, select your desired listings to email and click the **Email** button. Choose data you would like to send, address to your Contact and click the Email button at the bottom of the screen.

[Return to Contact Management](#)

Angela Washington-Marshall, Angela Washington-Marshall, EcoBroker, GREEN, e-PRO
Metro MLS Staff

News Feed **50+**

Searches

- elm grove sf
- met NOT quick
- Milwaukee Comm...
- open house
- Tosa Condos
- More

Listings

- Hidden

elm grove sf for Barkleys

[Save](#) [E-Mail](#) [Print](#) [CMA](#) [Export](#) [ShowingCart](#)

[Edit Search](#) [List](#) [Detail](#) [Photos](#) [Map](#) [Compare](#) [Messages](#)

Results: 27 Selected: 0

	Price	Status	MLS #	Postal Municipality	List Price	Bedrooms	Full Baths	Half Baths	G Garage Spaces	Est. Total Property Sq. Ft.	Type
	\$319,000	Active	12655	Elm Grove	319,000	3	2	0	2 A	1,634	Single-Family
Meadow Dr Elm Grove, WI 53122-2623											
Active / 1542754											
	\$339,900	Active		Elm Grove	339,900	3	1	1	1 A	1,587	Single-Family
1515 Blue Ridge Blvd Elm Grove, WI 53122-1913											