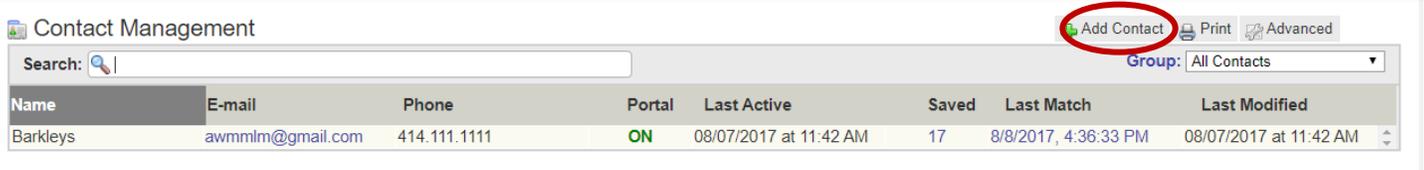


Adding Contacts and Subscriptions

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**

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.

The screenshot shows the 'Full Search' interface. At the top, there is a 'Return to Contact Management' link. Below it, the title 'Full Search' is displayed. The main area is divided into several tabs: 'Main', 'Exterior', 'Dates', 'Interior', 'Taxes', 'Address/School', 'Other', 'Rooms', 'Office/Member', 'Map', and 'Summary'. The 'Main' tab is active. Underneath, there are various search criteria with checkboxes and dropdown menus. For example, 'Status' is set to 'Active', 'County' is 'Milwaukee', and 'Municipality' is 'River Hills'. There are also input fields for 'List Price', 'Sold Price', 'Total Bathrooms', and 'Garage Spaces'. At the bottom center, a 'Save Search' button is highlighted with a red rectangular box.

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

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

x 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. If you have multiple searches, remember each search is its own entity – if you want it on a subscription, you have to create it for THAT search.

Barkleys

CONTACT DETAILS ACTIVITY **SEARCHES/SUBSCRIPTIONS** PORTAL MESSAGES NOTES LISTING NOTES MORE ▾

Searches

- my listings
- Milwaukee Communities
- Mymobile
- open house
- Tosa SF
- Tosa Condos
- wirex test

[+ 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 12/16/2017 12:44 PM](#) -
- [Reset time and view new since 12/16/2017 12:44 PM](#) -

Subscriptions [+ Add a Subscription](#)

Search Parameters
Metro MLS, WIREX - except Metro MLS;Property types Single Family, Multi Family, Vacant Land, Commercial, Rental, Condominium, Two-Family; Status of 'Active'; Listing Member of Rosie Realtor.; New results include new listings, back on market, price changes, status changes, and open house.
Created January 04, 2018, Updated January 04, 2018

[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:
 Yes (weekly) Selected contacts
 Send me an email when a contact clicks the link
 Enable Preview Mode

Contacts: Barkleys [Add New Contact](#)

Schedule: Please choose a schedule for this subscription:
 Weekly Sunday Monday Tuesday Wednesday Thursday Friday Saturday | Clear days
 Monthly Day of each month
 ASAP
 Continuous

View to send:
Single Family

Single Family:
Status, Postal/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 Listing

Body:

HTML: **B** **I** **U** **A** **Font Family** **Font Sizes** **Text Color** **Background Color** **Text Color** **Background Color** **My Photos** **List Photos**

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 ACTIVITY SEARCHES/SUBSCRIPTIONS PORTAL MESSAGES NOTES LISTING NOTES MORE ▾

Searches

- my listings
- Milwaukee Communities
- Mymobile
- open house
- Tosa SF
- Tosa Condos
- wirex test

[+ Add](#) [Rename](#) [Edit](#) [Remove](#)

View
Single Family

Listing Activity Report

Results

[View all](#) [View Totals](#)

- [View new in the last 24 hours](#)
- [View new since 12/16/2017 12:48 PM](#)
- [Reset time and view new since 12/16/2017 12:48 PM](#)

Subscriptions

[Subscription Barkleys 4](#)
- Created January 16, 2018, Updated January 16, 2018
awmmlm@gmail.com

Search Parameters

Metro MLS, WIREX - except Metro MLS; Property types Single Family, Multi Family, Vacant Land, Commercial, Rental, Condominium, Two-Family; Status of 'Active'; Listing Member of Rosie Realtor.; New results include new listings, back on market, price changes, status changes, and open house.
Created January 04, 2018, Updated January 16, 2018

[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	Type	Est. Total Property Sq. Ft.	Property Type
	\$319,000	★	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	★		Elm Grove	339,900	3	1	1	1 A		1,587	Single-Family
1515 Blue Ridge Blvd Elm Grove, WI 53122-1913												