Contacts

Contact Management is a powerful, yet easy-to-use client management tool in *FlexMLS*.   The functionality of this program includes saving your client's personal information in an easy to read and access format, attaching multiple property searches to each client, and creating subscription e-mails to deliver up-to-date search results to one or more e-mail addresses of your choice! The following pages will aid you with step-by-step instructions on using the features of this program.

What is a Contact?

A Contact is your buyer. A Contact search is a search you save specifically for a buyer. You enter the search criteria for the kind of properties your buyer is interested in, save the search to the buyer, and let the system automatically tell you when properties that meet those criteria come on the market.

Using Contact Management

Adding a Contact

To get started using the Contact Management module, in the menu 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 first position filed, **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.

Edit Contact - Barkleys

Name: Barkleys

Name: Gnarls | E | Barkley

Additional Contact: Europa | S | Barkley

Organization: BohemianHouse Productions

E-Mail: awmmlm@gmail.com

➕Add

Groups:
- Condominiums ▼ ✖
- Vacant Land ▼ ✖
- Single Family ▼ ✖ ➕Add

📝 Edit Group List

To add additional e-mail addresses, click the **Add** button, type your e-mail address in the additional field, and then select **Notify**

Primary: 414.111.1111   **Mobile:** 4142222222

Home: 4143333333   **Other:** 4144444444

Office: 4145555555   **Pager:** 4146666666

Fax: 4147777777

Home: 132 Sesame Street
address 2
PBSville | WI | 53201

Office: 123 Fantasy Island
address 2
Nowhere | WI | 53201

☐ Reverse Prospecting

Additional Info: Anniversary ▼ | newsfeed | ✖

Additional Info: Assistant ▼ | Mark Jones | ✖

Additional Info: Position ▼ | CEO - BohemianHouse | ✖ ➕Add

This option allows you to add additional information to your Contact's file such as birthdays, pets, etc.

Checking this box enables the Reverse Prospecting function.

CANCEL   **SAVE CHANGES**

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

At this point, you can add other information, such as attaching searches, notes, etc. If you need to change existing information, select the Contact in the list to bring up the options for that Contact.

Remove a Contact

To remove a Contact, select the Contact under the **Name** column; in the pop-up window that appears, click the **Remove** link. A pop-up box will appear presenting you with options of the Contact you can remove.
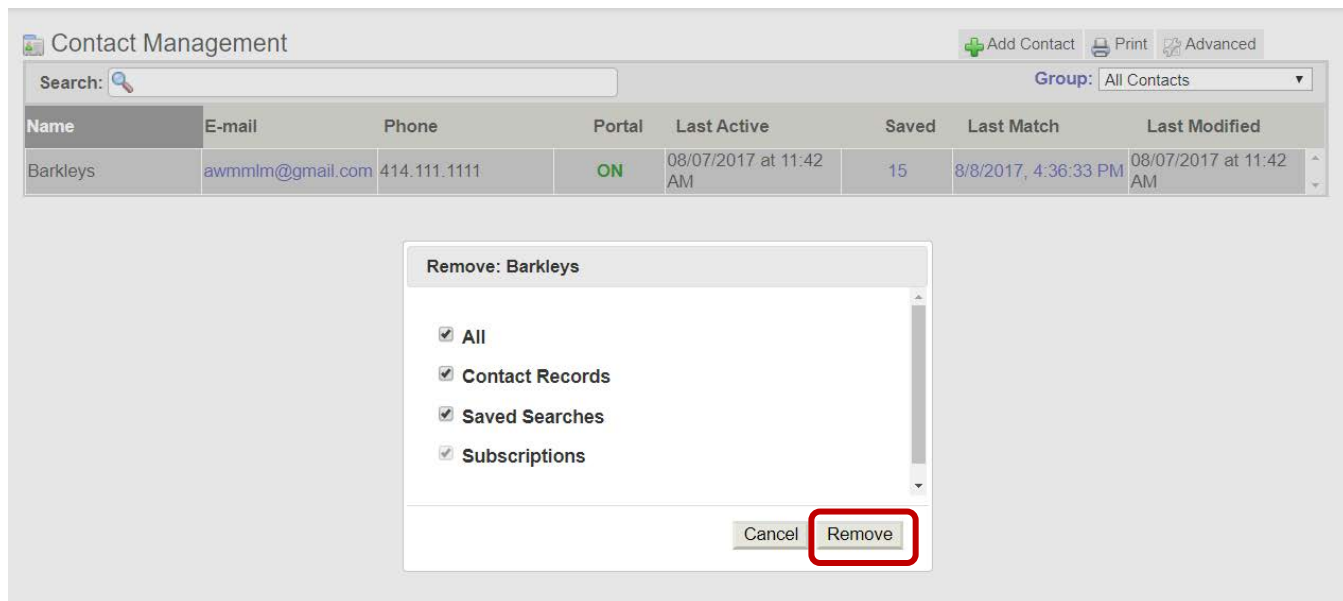
Deactivate a Contact

You may temporarily stop activities of a Contact by using the Deactivate option. To deactivate a Contact, select the Contact under Name column; click the **Deactivate** link. A pop-up box will appear presenting you with options of the Contact you can deactivate.
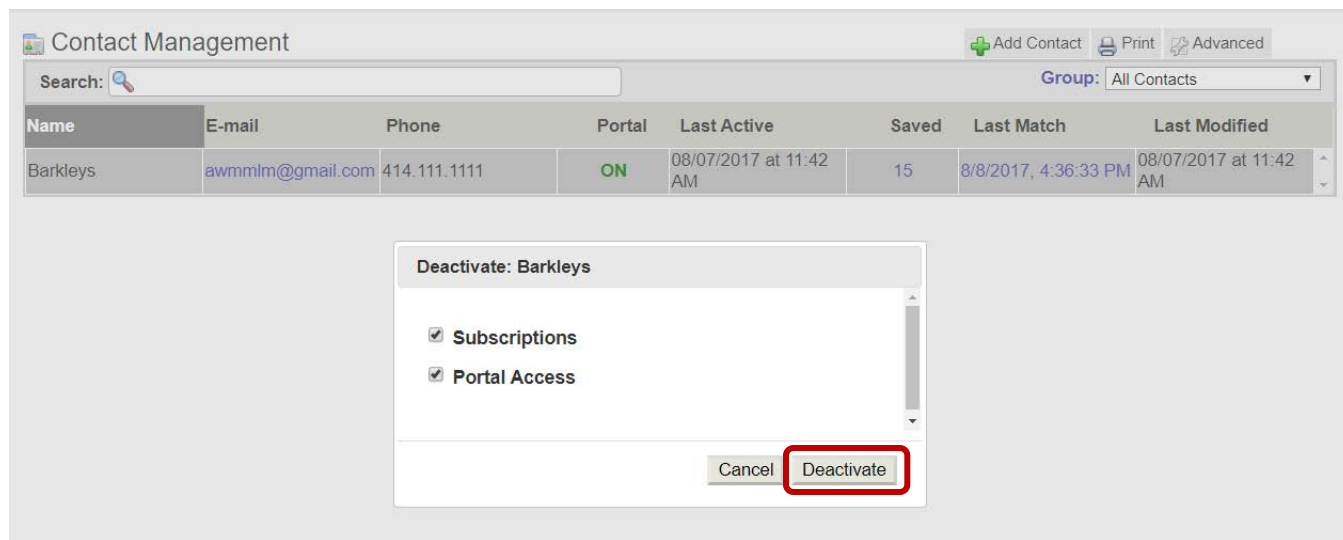
Transfer a Contact

You may transfer a Contact to another member within your home office by selecting the Contact, and then clicking the **Transfer** link. A pop-up box will appear where you can enter the name of the member to whom you would like to transfer the Contact.

Attaching a Search to a Contact

To attach a search to a Contact, select the Contact by clicking on their Name; in the pop-up window for that Contact, click the **Searches/Subscriptions** link. If you have no searches saved to your Contact, your screen will look like the one below. Click the **Add** button.

If you do not have any searches saved in your Saved Search module, you will be routed to Quick Search, where you will select your property and parameters to search.

If you do have one or more saved searches in your Saved Search module, after clicking **Add**, the Attached Saved Search box will appear; click **Create New Quick Search** to start your property search.

NOTE: You may attach one or more existing searches from your Saved Searches to a Contact by highlighting a search (if more than one, hold down your **CTRL** key while selecting them with your mouse) in the box, and then clicking the **Attach Search(es)** button.

Once you have completed entering your search parameters, you have the options to view the search results or save your search by clicking the **Save** button.

Clicking the **Save Search** will bring you to the Save Search screen:

In this screen, give your search a name in the Search Name field; keep in mind your Contact will see this search name in their Email Subscription. Notice in the Contact section, the Contact you started with in Display Name on your initial page is now in this screen after Contact. If you click on **Additional Search Options**, you can choose your desired events for this search to send by selecting them with a check in the appropriate box(es). To complete saving the search and set up the subscription, click the **Save and Add Subscription** button.

You should now be in the Edit Subscription screen. Here, just choose the schedule you would like the subscription to follow, enter text in the Subject line, and then click the **Save**

Edit Subscription

General Subscription Options	
Subscription name	Subscription Me
Send notification of new listings to	☐ You (sender) ☑ Selected contacts
	☑ Send me an email when a contact clicks the link
	☐ Enable Preview Mode ?

Contacts | × Me | 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:
Postal Municipality, List Price, Address, Status, Bedrooms, Full Baths, Half Baths, Garage Spaces, Garage Type, Est. Total Sq. Ft., Property Type, Municipality

E-mail content

Templates: Subscription Basic ▾
? Save as New 📄 Update 📝 Rename 📑 Make Default ❌ Delete

Subject: New and Updated Listings

Body: Hello. These are the most current updates for your search. If you have any questions, do not hesitate to contact me!

HTML ○
Text ◉

Save

After you create the subscription, a notification is emailed to your Contact to confirm the email subscription you have created for them. Your Contact MUST approve the subscription to receive the automatic updates. To approve the subscription, they will click the **YES, PLEASE SEND ME LISTINGS** link in the emailed notification.
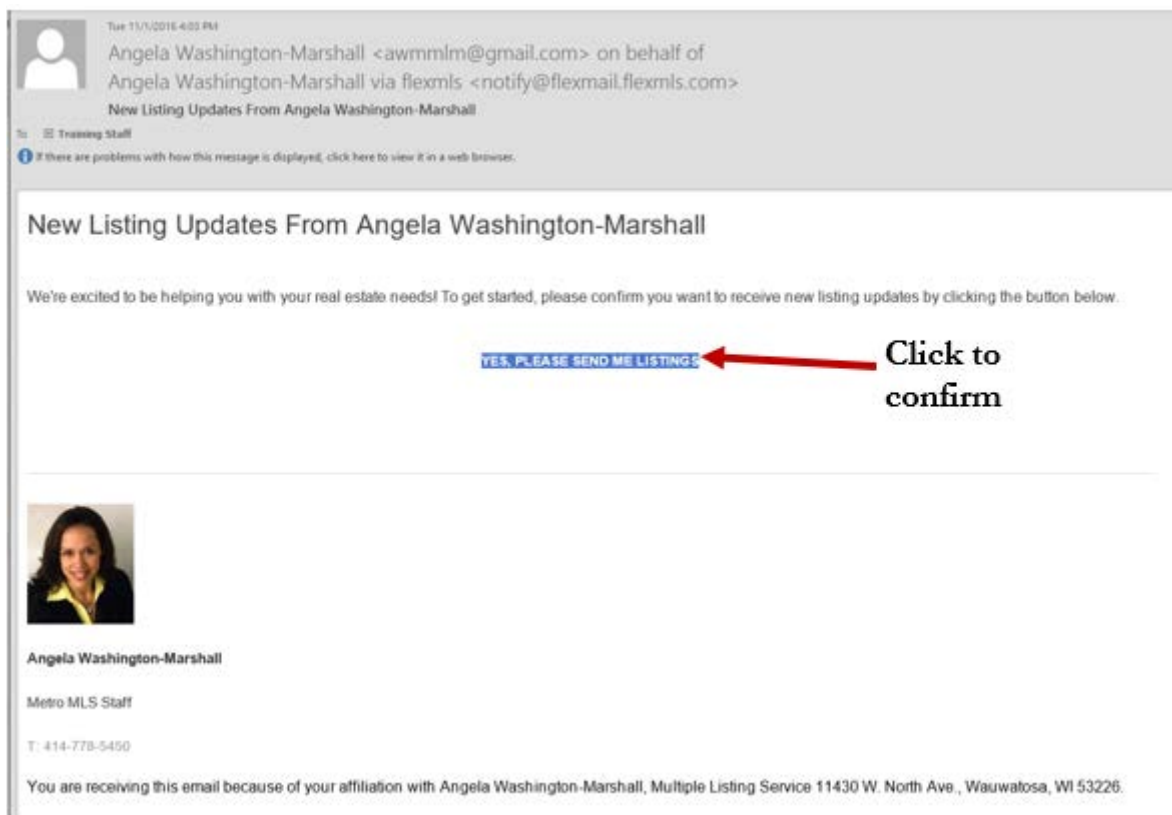
If the recipient clicks '**YES, PLEASE SEND ME LISTINGS'** but their Subscription has not sent any listings to their News Feed yet, they will be taken to a screen that lets them know their account has been confirmed and they will receive new listing updates by email.
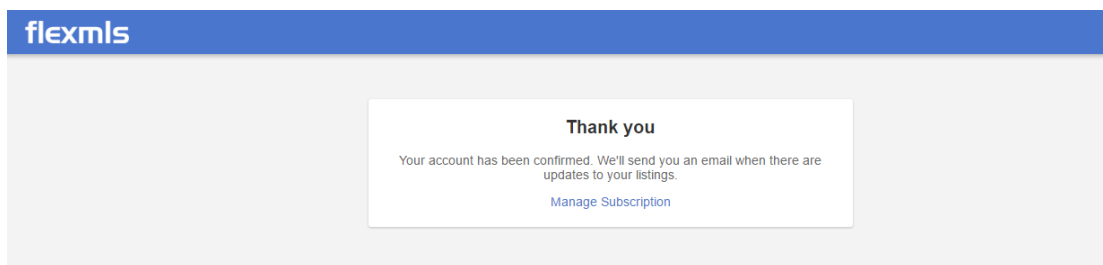
If the recipient clicks '**YES, PLEASE SEND ME LISTINGS**' and their News Feed has had listings sent via Subscription between the time the subscription was created and the time your Contact clicked the confirmation link, they will be taken directly to their News Feed. A message saying "Thanks! We've confirmed your email" will appear on the screen to let them know that they have successfully confirmed their email address to receive Subscription updates.

Adding Additional E-mail Addresses to a Subscription

To add additional e-mail addresses to a subscription, start by clicking the Contact you would like to work with in Contact Management, and then click the **Edit Contact** link at the bottom of the pop-up screen. This will open your Contact in the edit mode. Next to the E-Mail field, click the **Add** button. This will open a blank field for you to type in another e-mail address; next select the **Notify** check box. For each e-mail address you would like to enter, click the **Add** button for access to a field to type them in. After you are done adding e-mail addresses, click the **Save Changes** button at the bottom of the screen.

Edit Contact - Buyers

Name:	Buyers			**Groups:**	None ➕ Add
Name:	Joe	Buyer			📝 Edit Group List
Additional Contact:	Jane	Buyer			
Organization:					
E-Mail:	hotbuyer@email.com				
	hotbuyer2@email.com	☑ Notify ✖			
	➕ Add				

Primary:	414.777.9311	**Mobile:**		**Home:**	address	
Home:		**Other:**			address 2	
Office:		**Pager:**			city	st	zip
Fax:				**Office:**	address	
					address 2	
					city	st	zip

☐ **Reverse Prospecting**

No Additional Info ➕ Add

CANCEL   **SAVE CHANGES**

Copyright © 2020, Multiple Listing Service, Inc.

You can navigate to the Searches/Subscriptions tab for this Contact to confirm both email addresses are listed under the Subscriptions section.

NOTE: If you have multiple searches saved to a Contact and set up on a subscription, all additional email addresses that are set to Notify will receive the results of all subscribed searches.

Additional Features of Contact Management

Activity link

The Activity section tracks Contact activity, allowing you to see your most active contacts with a quick glance. The activity graphs lets you quickly assess which clients are active or inactive and prioritize your follow-ups more efficiently. The Contact Activity bar on the Contact Management screen will indicate which Contacts have been the most active in the past seven days; looking at a Contact's details lets you see their activity over the last 30 days. You can drill down to see listings that they have viewed, listings they've shared with others, and their email activity for subscription and manual emails. Portal activity is also included in Contact Activity, so if your Contact relies on the Portal to view listings, you'll know that they are actively looking at listings with the portal that you provided for them.

Barkleys

CONTACT DETAILS   ACTIVITY   SEARCHES/SUBSCRIPTIONS   PORTAL   MESSAGES   NOTES   LISTING NOTES   MORE ⌄

Activity Over The Last 30 Days

30 Days Ago ◀   Yesterday

Viewed Listings (30)   +

Shared Listings (1)   +

Email Activity   +

EDIT CONTACT   REMOVE   DEACTIVATE   TRANSFER   CLOSE
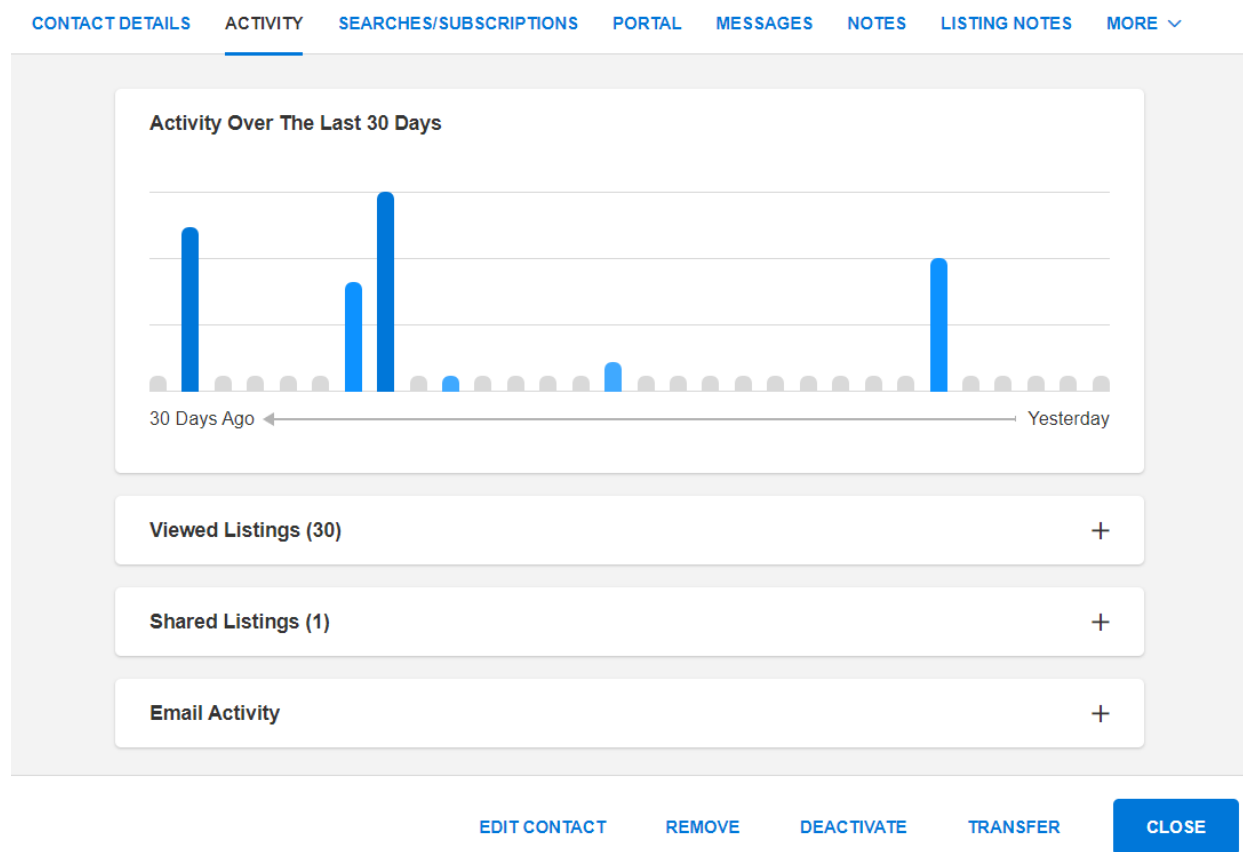
Viewed Listings - represents the last listings accessed by the Contact, sorted by the number of times they were clicked on.

Shared Listings – represents the listings they shared via their Contact Portal.

Email Activity – tracks the sent and opened (clicked) emails sent via manual and subscription for the life of the Contact.

Portal link (Classic Version)

The Contact Portal feature helps you to consolidate communications with your Contacts. Contacts can access both messages and listings you send them. The Portal tab within the Contact allows you create their Portal, manage its settings, and view content added to their collection.

Barkleys

CONTACT DETAILS   ACTIVITY   SEARCHES/SUBSCRIPTIONS   PORTAL   MESSAGES   NOTES   LISTING NOTES   MORE ⌄

Client Portal: ⦿ ON ○ OFF   🖼 **View Portal**

Your portal url: http://portal.flexmls.com/awmmetromls

View News Feed

Viewed Listings are now on the Activity Tab

Portal Listing Collections

🛒 Saved		20	Clear
🛒 Recommended		3	Clear
🛒 Hidden		2	Clear
🛒 Hidden by Agent		0	Clear
🛒 Created 3-1-17		4	Delete
🛒 Super Hot House		0	Delete

Portal Activity

Last Active   01/06/2018 09:48 AM

☐

Send a message to me when Barkleys logs into the portal on a computer

Portal Saved Searches

🔍 Brookfield SF   More ⌄

Most Recent Unsaved Search

No unsaved searches

Portal Account

Username: awmmlm@gmail.com

[Reset Account]

Change Settings...

EDIT CONTACT   REMOVE   DEACTIVATE   TRANSFER   **CLOSE**

Portal link (New Version)

The difference with the New version is there is no **View Portal** link; you can use the **View All** link on Searches/Subscriptions for similar functionality.

Messages link

The Messages tab archives all message communications between you and that Contact via the Portal, along with date and time stamps of messages sent. Here, you create, reply to, and delete messages.

Barkleys

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

Contact Messages:

☐ Send a message to me when Barkleys logs into the portal   **Write a message to Gnarls E Barkley**

Expand all messages   Collapse all messages   Search messages

Displaying messages 1 through 50 of 73   << Prev **1** 2 Next >>

⊞ Re: Note added to 3528 N Frederick Ave, Shorewood, WI 53211-2509 (MLS# 1560396)	To: Gnarls E Barkley	12/20/2017
[1559830] 4520 N 100th ST, Wauwatosa, WI 53225-4706 (MLS #1559830)	From: Gnarls E Barkley	12/20/2017
Note added to 655 Meadow Ln, Elm Grove, WI 53122-2451 (MLS# 1552509)	From: Gnarls E Barkley	10/03/2017
Note added to 555 Hawks Ridge Rd, Brookfield, WI 53045-6322 (MLS# 1545195)	From: Gnarls E Barkley	10/03/2017
[1483236] W3245 Snake Rd, Linn, WI 53147-3579 (MLS #1483236)	From: Gnarls E Barkley	09/26/2017
[1547685] Contact request, 15550 Apple Valley Ct, Brookfield, WI 53005-3602	From: Gnarls E Barkley	09/26/2017
Note added to 9528 W Lorraine Pl, Milwaukee, WI 53222-4540 (MLS# 1550383)	From: Gnarls E Barkley	09/21/2017
[1538493] Contact request, 3051 N 87 ST, Milwaukee, WI 53222-4732	From: Gnarls E Barkley	07/18/2017

EDIT CONTACT   REMOVE   DEACTIVATE   TRANSFER   **CLOSE**

Notes link

You can keep a journal for your activities with a Contact. If you wish to record phone calls, showings, mailings, and the like, you can do this using the Notes tab in your Contact's file. In Contact Management, highlight the Contact you wish to work with, and then click the Notes tab. To add text to the box in this tab, click the **Add New** button underneath the Contact Notes box. This will open a text box within the Contact Notes box where you can type your desired notes. Under this text box, you will see the current date and time. If needed, you can adjust both of these to reflect a different date and time stamp for the current note you are adding. To save your note, click the **Save Note** button located on the right side of the Contact Note box.

Barkleys

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

Contact Notes:

Contact transferred from Scott Lang
2/06/2014 5:16 PM
Contact transferred from Angela Washington-Marshall
2/05/2014 9:22 AM
added user 5/1/2008
5/01/2008 11:10 AM

Add New button.

➕ Add New   🖨 Print

EDIT CONTACT   REMOVE   DEACTIVATE   TRANSFER   **CLOSE**

Listing Notes link

The Listing Notes tab allows you to view and edit the shared listing notes for the selected Contact via the Portal. Listing Notes are specific to the Contact and Listing in question.

NOTE: The Listing Notes function is only available in Classic Portal.

Barkleys

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

Listing Notes: Sort by [Newest first ▾]

1560396 Dec 14, 2017		really like want to see
1552509 Oct 3, 2017		Neighbor has dogs
1545195 Oct 3, 2017		Wonderful landscaping
1550383 Sep 21, 2017		8wo9riusoilfujjdwlidk
1520977 May 16, 2017		it on the corner
1466614 Aug 16, 2016		A lot of grass to cut
1445113 Jun 9, 2016		1st flr condo
1480638 Jun 9, 2016		Pretty purple
1469353 Apr 14, 2016		i don't like being on the corner
1413207 Jul 28, 2015		great yard
1404333 Jul 28, 2015		This is a test
1404538 Jul 28, 2015		this is my note for this listing 8 got your note
1238128 May 26, 2015		The view rocks!
1410585 Mar 24, 2015		test this feature

EDIT CONTACT   REMOVE   DEACTIVATE   TRANSFER   **CLOSE**

Links link

The Links tab keeps a list of all manual e-mails sent to that Contact. The links will remain for 30 days from the date sent. On this tab, you can view the content of sent e-mails, view the description (what was in the Subject line when the e-mail was sent), the View included on the List tab, how many times the e-mailed link was viewed (Hit Count), and the last time the e-mailed link was viewed. You can also delete sent links from this tab by clicking the red 'X' that corresponds to the link you would like to delete. Deleting any manually sent e-mails from this screen will also remove them from that Contact's Portal. Deletions from this screen do not affect the My Sent E-mails screen – nor does it delete it from the Contact's email inbox.

Barkleys

| CONTACT DETAILS | ACTIVITY | SEARCHES/SUBSCRIPTIONS | PORTAL | MESSAGES | NOTES | LISTING NOTES | MORE ∨ |

Contact Links:

	Description	View	Hit Count	Last Viewed At	Sent At	
🔗 Search Results	📝 Listings	Single Family	3	12/21/2017 at 12:22 PM	12/21/2017 at 12:07 PM	❌

EDIT CONTACT   REMOVE   DEACTIVATE   TRANSFER   **CLOSE**

Groups

The Groups function allows you to create groups of your choosing, and organize your Contacts in those groups. Imagine we were back on the old 'paper' system. You would most likely have your clients organized in file folders. These folders would have names according to how you have your clients organized. Maybe you would sort them according to the property types they are interested in. Or, you may have them sorted by the municipality in which they would like to purchase property. You can do this same function, by creating groups, and then adding the Contact in the group or groups that would apply.

To create a Group in the Contact Management screen, click the **Group** link.

Contact Management

🖼 Contact Management   ➕ Add Contact   🖨 Print   📑 Advanced

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

This will bring up the Available Groups box. To create a new group, click the **Add New** button. Add New Group will appear with a Name field where you can type your Group name. Click the **Save** button to save your group. Click the **Return to Contact Management** button to exit this screen and return to Contact Management.


Advanced

The Advanced function contains the following features:

- **Contact Summary** – Clicking this link routes you to the Contact Summary screen. You can also access Contact Summary under the Contacts menu.
- **Export Contacts** – This function will take all of your Contacts and convert their information into a CSV format. This file can be opened by any program that will accommodate a CSV file, such as Microsoft Excel. Information exported are the fields of Display Name, E-mail Address, Last Modified Date & Time, Home Address City, State & Zip Code, Office Address City, State & Zip Code, all fields in the Additional Info option, First, Middle, and Last Name, Spouse's First, Middle, and Last Name, and all phone numbers.
- **Create Portal Accounts** – This function will immediately create Portal accounts for all of your Contacts at one time, generating a system created username and password for each.
- **Create Portal Accounts with Notification** – This function will immediately create Portal accounts for all of your Contacts at one time and e-mail out a notification to each of the Contacts containing their system generated username and password.
- **Show/Hide Quick Add** – This function shows or hides the Quick Add option. This allows you to quickly add a Contact by entering just first name, last name, and e-mail address. To access this option, click on the Advanced button > Show/Hide Quick Add link. The Quick Add section, shaded in blue, will appear.
- **Customize Contact List** – This feature allows you to include additional columns of information on the Contact Management screen. This information can include if the Contact has an active Portal account, date/time of last login to their Portal, listings you have recommended, Contact creation date, and their chosen Saved and Hidden listings.
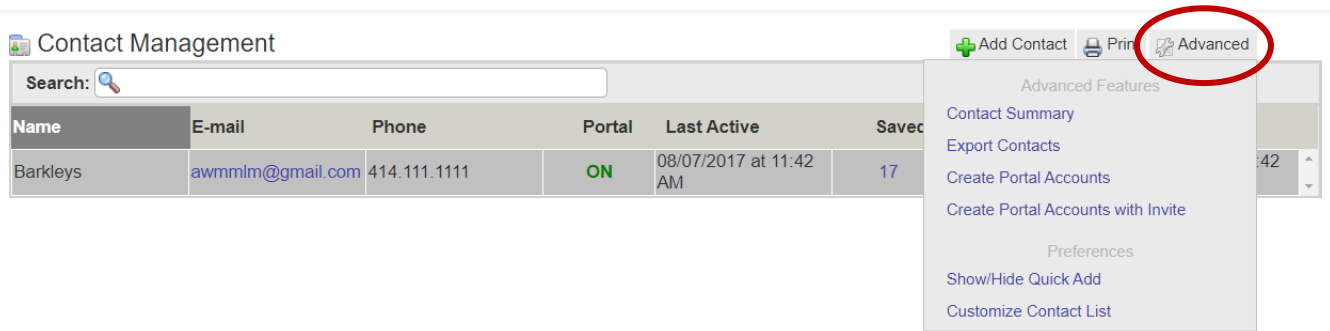
Print

The following functions are available under **Print** on the Contact Management home screen.
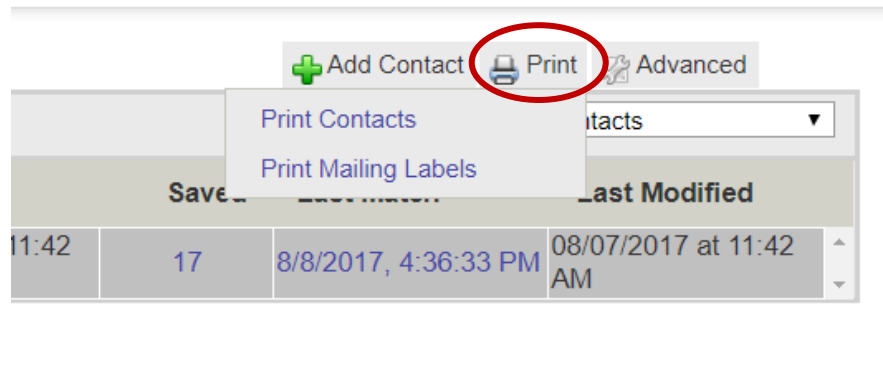
- **Print Contacts** – This feature allows you to print a copy of your Contacts' profile information. This includes their general information (names, e-mail and physical addresses, Contact numbers), Portal information, attached searches, groups, and notes. You can print all Contacts at once or one at a time.

- **Print Mailing Labels** - This feature allows you to print mailing labels using your Contacts information. You can print labels using a .csv file or having the labels open in your browser.

Editing a Search

To edit an existing search for a Contact, in the menu, start at Contact Management. Highlight the Contact you want to work with, click the Searches/Subscriptions link, and then, under the Searches box, click the **Edit** button.

There will be a pop-up box where you can choose to edit the search or edit the view associated with the search. Click the **Edit Search** button.

This will take you into the existing search parameters; use 'Add a field to the search' to add new parameters; to edit existing parameters, click the applicable link for that parameter. After editing, you can choose to save your new changes to the existing search by clicking the **Save** button, or you can click the **View Results** link to view the listings of that search, e-mail, or print them.

Edit a Subscription

To edit a Subscription, start at Contact Management. Highlight the Contact you want to work with, click the Searches/Subscriptions link, and highlight the search you would like to edit in the Searches box. Under the Subscription heading, click the **Subscription** 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

Listing Activity Report

Results   🔍 View Totals

View all   -
View new in the last 24 hours   -
View new since 12/12/2017 04:11 PM   -
Reset time and view new since 12/12/2017 04:11 PM   -

Subscriptions

📇 Subscription Barkleys 3
Created January 12, 2018, Updated January 12, 2018   ❌
awmmlm@gmail.com

Search Parameters

Property type Single-Family; ; Status of 'Active'; and not Contingent of 'With Offer'.; New results include new listings, back on market, price changes, status changes, and open house.
Created July 26, 2017, Updated January 12, 2018

EDIT CONTACT   REMOVE   DEACTIVATE   TRANSFER   **CLOSE**

This will open the Edit Subscription screen. Make your desired edits and then click **Next** to save your changes.

Edit Subscription

General Subscription Options	
Subscription name	Subscription Barkleys
Send notification of new listings to	☐ You (sender) ☑ 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: [1st ▼] day of each month
◯ ASAP
◯ Continuous

View to send

[Single Familyerer ▼]

Single Familyerer:
Status, Postal Municipality, List Price, Address, Bedrooms, Total Bathrooms, Garage Spaces, Garage Type, Est. Total Sq. Ft., Property Type, Listing Office
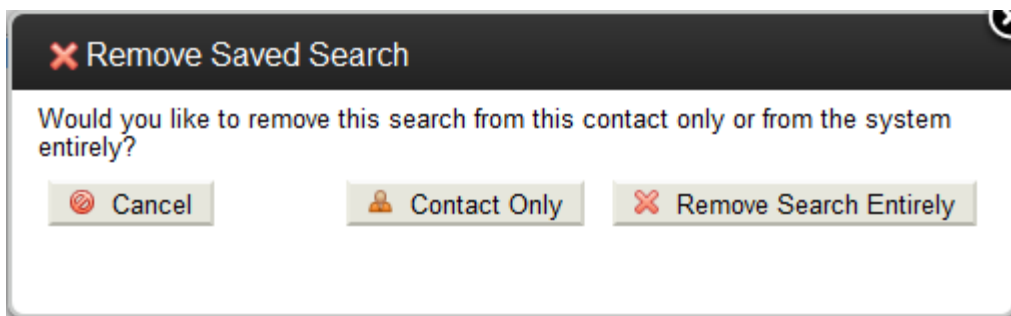
E-mail content

Templates: You currently have no saved email templates
❓ Save as New

Subject: [MKE Comunities]

Body:

HTML ◉
Text ◯

File ▾   Edit ▾   Insert ▾   View ▾   Format ▾   Table ▾   Tools ▾

B *I* U   A ▾ A ▾   Font Family ▾   Font Sizes ▾   ☰ ☰ ☰ ☰   ☰ ▾ ☰ ▾ ☰ ☰   My Photos   List Photos

[Save]

Removing a Subscription

To remove ONLY the Subscription and retain the Contact with its associated search, start at Contact Management. Highlight the Contact you want to work with, click the Searches/Subscriptions tab, and highlight the search to work with in the Searches box. Click the red '**X**' located at the right of the Subscription section to remove. Click **OK** on the pop-up that appears, confirming deletion.

Click to remove Subscription.

Removing a Search

To remove a search from a Contact, but retain the Contact, start at Contact Management. Highlight the Contact you want to work with, and then click the Searches/Subscriptions tab. In the Searches box, highlight the search to be removed, and then click the **Remove** button under the Searches box.

In the Remove Saved Search pop-up, it asks you would you like to remove this search from this Contact only or from the system entirely. Make your desired choice to complete the transaction. This will also remove any event associated with the deleted search.

Removing a Contact

To remove a Contact completely from your FlexMLS account, start at Contact Management. Select the Contact you want to work with, and then click the **Remove** link located at the bottom of the screen.

In the Remove pop-up box, select if you would like to remove just the automatic e-mail events, all saved searches for this Contact, Contact records (deletes all personal info; searches are moved to Saved Searches), or the entire Contact file, and then click **Remove**.