

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.

The screenshot shows the mls.swis website interface. At the top, there is a search bar with the placeholder text "Enter an Address, City, ZIP, MLS #, or Contact...". To the right of the search bar are links for "Help" and "AW-M as RA.R". Below the search bar is a navigation menu with options: "Menu", "Full Search", "Contact Mgmt", "Map Search", "Saved Search", "Change Listing", "My Sent E-Mails", and "More". The "Contact Mgmt" option is selected. Below the navigation menu is the "Contact Management" section. It features a search bar with a magnifying glass icon and a "Group" dropdown menu set to "All Contacts". To the right of the search bar are buttons for "Add Contact" (circled in red), "Print", and "Advanced". Below these buttons is a table with the following columns: "Name", "E-mail", "Phone", "Portal", "Last Active", "Recommend", "Saved", "Unread", "Listings", "Last Match", and "Listings to Approve".

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.

Add Contact



Name: Buyers

Name:

Joe

Buyer

Additional Contact:


Jane

Buyer


Organization:


E-Mail:


hotbuyer@email.com




Add



Groups: None  Add



Edit Group List



Primary: 414.777.9311

Home:


Office:

Fax:

Mobile:

Other:

Pager:



Home: address

address 2

city

st

zip

Office: address

address 2

city

st

zip



☐ **Reverse Prospecting**

No Additional Info 

Add



☐ **Create a Portal Account for this Contact**

An invite with the portal login name and password will automatically be sent









Checking this box will immediately create a Portal account for the Contact.

[CANCEL](#)



ADD CONTACT






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:	<input type="text" value="Barkleys"/>				Groups:	<input type="text" value="Condominiums"/>	
	Name:	<input type="text" value="Gnarls"/>	<input type="text" value="E"/>	<input type="text" value="Barkley"/>			<input type="text" value="Vacant Land"/>	
	Additional Contact:	<input type="text" value="Europa"/>	<input type="text" value="S"/>	<input type="text" value="Barkley"/>			<input type="text" value="Single Family"/>	 
	Organization:	<input type="text" value="BohemianHouse Productions"/>					Edit Group List	
	E-Mail:	<input type="text" value="awmmmlm@gmail.com"/>						
		 Add						

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

	Primary:	<input type="text" value="414.111.1111"/>	Mobile:	<input type="text" value="4142222222"/>		Home:	<input type="text" value="132 Sesame Street"/>	
	Home:	<input type="text" value="4143333333"/>	Other:	<input type="text" value="4144444444"/>			<input type="text" value="address 2"/>	
	Office:	<input type="text" value="4145555555"/>	Pager:	<input type="text" value="4146666666"/>			<input type="text" value="PBSville"/>	<input type="text" value="WI"/> <input type="text" value="53201"/>
	Fax:	<input type="text" value="4147777777"/>				Office:	<input type="text" value="123 Fantasy Island"/>	
							<input type="text" value="address 2"/>	
							<input type="text" value="Nowhere"/>	<input type="text" value="WI"/> <input type="text" value="53201"/>

	Reverse Prospecting	
Additional Info:	<input type="text" value="Anniversary"/>	<input type="text" value="newsfeed"/> 
Additional Info:	<input type="text" value="Assistant"/>	<input type="text" value="Mark Jones"/> 
Additional Info:	<input type="text" value="Position"/>	<input type="text" value="CEO - BohemianHouse"/>  


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:



Q Enter an Address, City, ZIP, MLS #, or Contact...

Help ▾ AW-M as AW-M ▾

Menu

Full Search Contact Mgmt Saved Search Map Search Multiple Address My Sent E-Mails More ▾

Reorder...

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	15	8/8/2017, 4:36:33 PM	08/07/2017 at 11:42 AM

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.

Barkleys

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



Barkleys Last activity 6 days ago
Barkley, Europa S (Additional Contact)
BohemianHouse Productions



Group: None

E-mail	Last E-mail Activity	Status	Action
awmmlm@gmail.com	6 days ago	Confirmed,	



Primary:	414.111.1111	Mobile:	4142222222
Home:	4143333333	Other:	4144444444
Office:	4145555555	Pager:	4146666666
Fax:	4147777777		



Home: 132 Sesame Street, PBSville, WI 53201
Office: 123 Fantasy Island, Nowhere, WI 53201



Reverse Prospecting: Disabled

E-mail Activity: Subscription Viewed: -, Manual: 0, Viewed: 3

Total Activity: Manual: 0, Viewed: 32

Listings to Approve: 0

Listings Automatically Sent: 33

Anniversary: newsfeed
Position: CEO - BohemianHouse

Assistant: Mark Jones

EDIT CONTACT

REMOVE

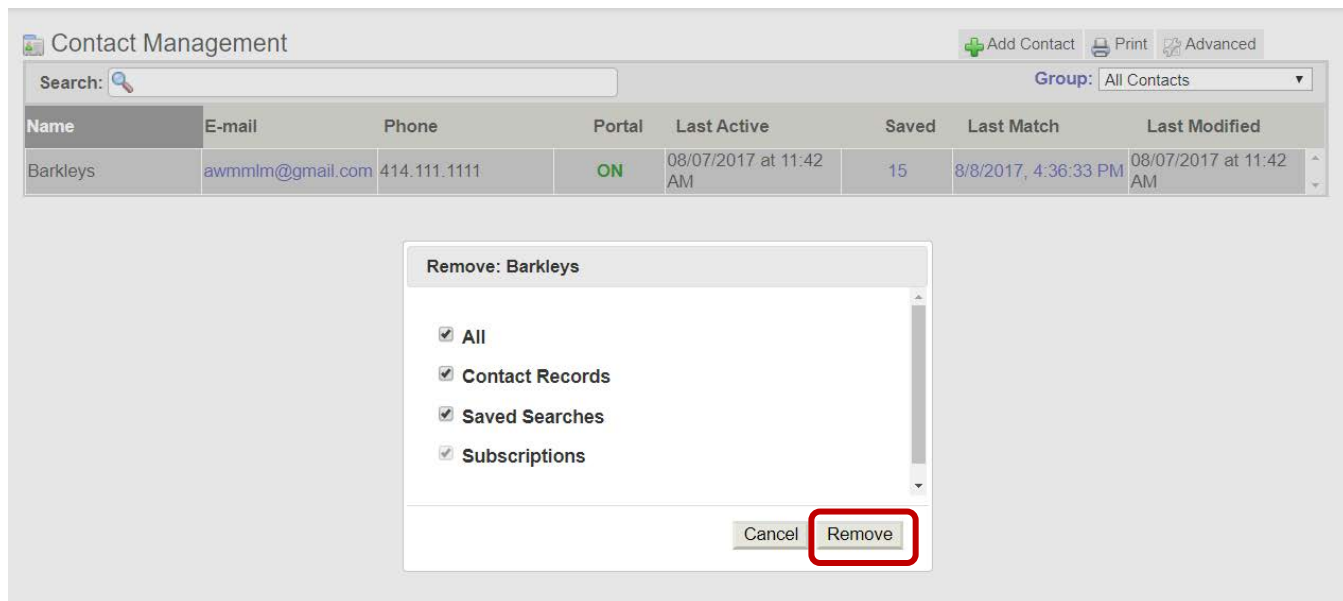
DEACTIVATE

TRANSFER

CLOSE

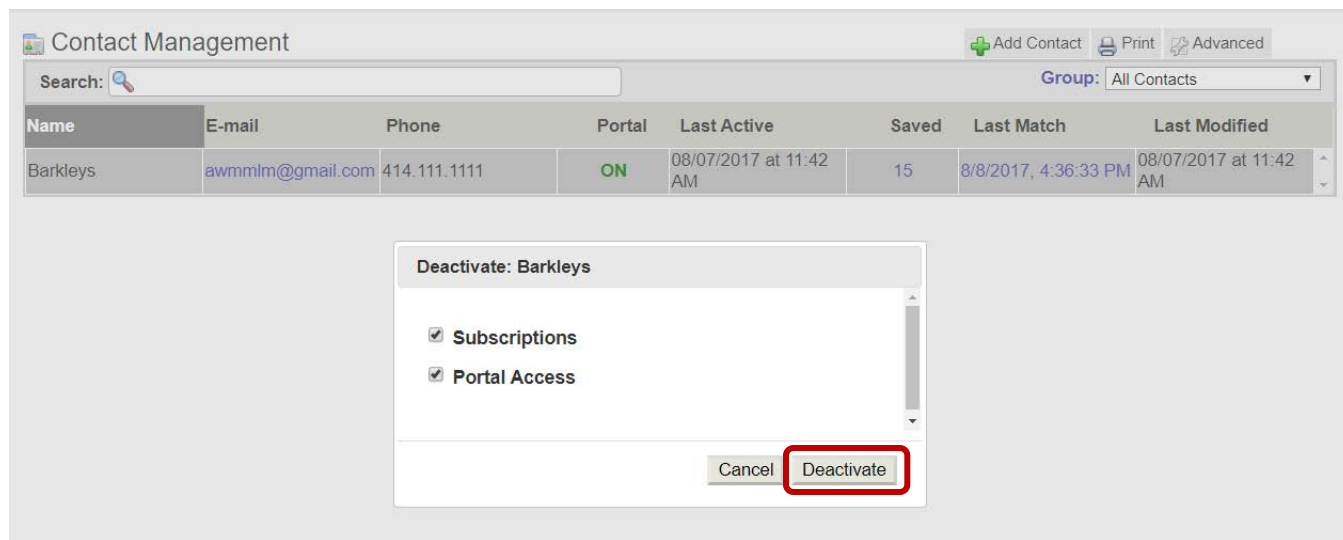
Remove a Contact

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.

The screenshot shows the 'Contact Management' interface. At the top, there's a search bar and a 'Group' dropdown set to 'All Contacts'. Below this is a table of contacts. The contact 'Barkleys' is selected. A pop-up window titled 'Transfer: Barkleys' is displayed, asking the user to choose a member to transfer the contact to. The search bar in the pop-up contains 'chuc', and the results list 'Detroye, Chuck (chuck)'. The 'Transfer' button is highlighted.

Name	E-mail	Phone	Portal	Last Active	Saved	Last Match	Last Modified
Barkleys	awmmmlm@gmail.com	414.111.1111	ON	08/07/2017 at 11:42 AM	15	8/8/2017, 4:36:33 PM	08/07/2017 at 11:42 AM

Transfer: Barkleys

Please choose the member to whom you wish to transfer Barkleys

Search: chuc

Detroye, Chuck (chuck)

Cancel Transfer

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.

The screenshot shows the 'Me' contact details page. The 'SEARCHES/SUBSCRIPTIONS' tab is selected. The 'Searches' section is empty, and the 'Add' button is circled in red. The 'Results' section shows 'Subscriptions' and 'Search Parameters' fields. The 'View' section shows a 'Listing Activity Report' link. At the bottom, there are buttons for 'EDIT CONTACT', 'REMOVE', 'DEACTIVATE', 'TRANSFER', and 'CLOSE'.

Me

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

Searches

Add Rename Edit Remove

Results

Subscriptions

Search Parameters

View

Listing Activity Report

EDIT CONTACT REMOVE DEACTIVATE TRANSFER **CLOSE**

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.

The screenshot displays a real estate search application interface. At the top left, there is a link "Return to Contact Management". The main header shows "01 Single Family" with a dropdown arrow, and an annotation "Select property type" points to it. To the right of the header are buttons: "Work on behalf of ...", "E-Mail", "Save", "Print", "CMA", and a menu icon. Below the header is a navigation bar with links: "EDIT SEARCH", "LIST", "DETAIL", "PHOTOS", "MAP", "COMPARE", and "MESSAGES".

On the left side, there is a search filter panel. It starts with "View Results: 19,090". Below this is a section "Property Type of Single Family" with a search input field "MLS #, address or map overlay" and a "Browse »" link. A list of filters follows, each with a checkbox and a close button (X):

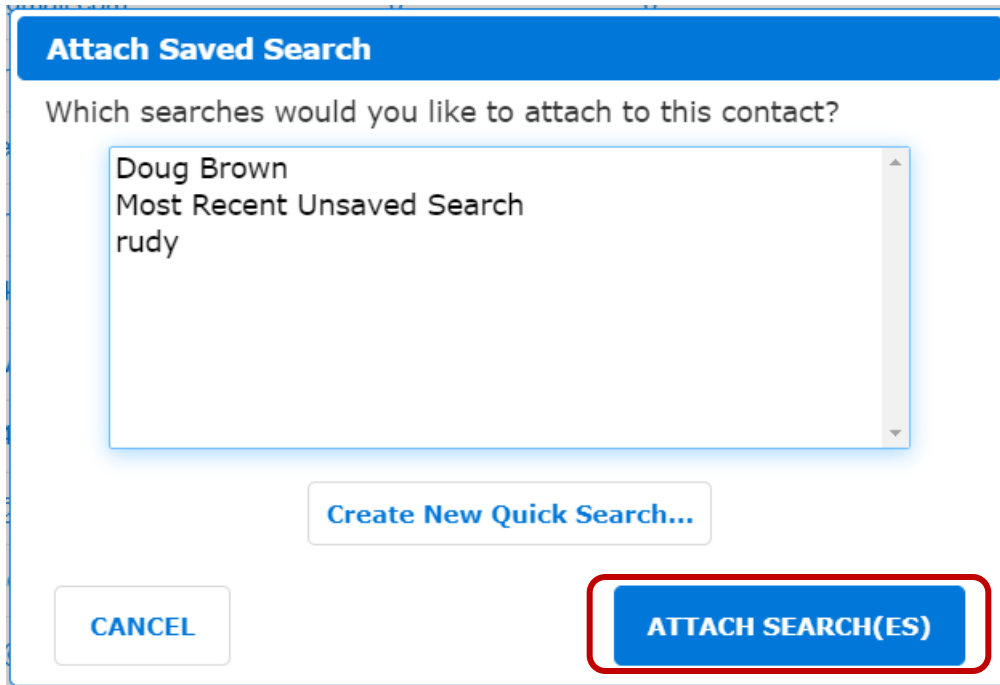
- ☒ Status of Active
- ☐ Contingent
- ☐ County
- ☐ Municipality
- ☐ Zip Code
- ☐ Listing Date
- ☐ List Price
- ☐ Sold Price
- ☐ Bedrooms
- ☐ Total Bathrooms
- ☐ Garage Spaces
- ☐ Garage Type
- ☐ Body of Water
- ☐ Subdivision
- ☐ School District
- ☐ Street Name
- ☐ Start Showing Date
- ☐ State
- ☐ Municipality

Below the filters is a section "+ Add a field to the search". Underneath is a section "- Additional Search Options" with checkboxes for "Pictures", "Videos", "Documents", "Virtual Tours", and "Open House Date".

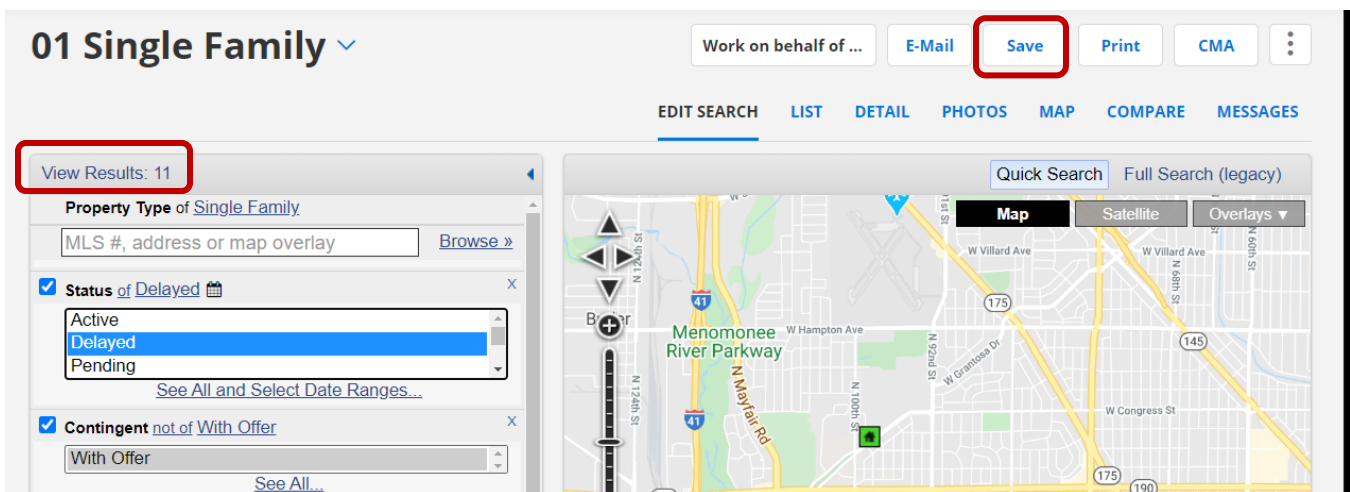
On the right side, there is a map view. A "Quick Search" button is at the top right of the map area. The map shows a region with various towns and roads. A white overlay box in the center of the map displays the text "19,090" and "Listing matches found". Below this text are three buttons: "CLOSE", "VIEW LIST", and "VIEW MAP". The map interface includes standard navigation controls like a compass, zoom in/out buttons, and a scale bar (8 km / 5 mi). The Google logo is visible at the bottom left of the map, and "Map data ©2020 Google" is at the bottom right.

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.

A dialog box titled "Attach Saved Search" with a blue header. The main text asks "Which searches would you like to attach to this contact?". Below this is a text area containing the text "Doug Brown", "Most Recent Unsaved Search", and "rudy". At the bottom, there are three buttons: "CANCEL", "Create New Quick Search..." (in blue), and "ATTACH SEARCH(ES)" (in blue and highlighted with a red border).

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.

A screenshot of a web application interface for property searches. At the top left, it says "01 Single Family" with a dropdown arrow. To the right are buttons for "Work on behalf of ...", "E-Mail", "Save" (highlighted with a red border), "Print", and "CMA". Below these are tabs for "EDIT SEARCH", "LIST", "DETAIL", "PHOTOS", "MAP", "COMPARE", and "MESSAGES". On the left side, there's a "View Results: 11" button (highlighted with a red border). Below it, the "Property Type of Single Family" is shown. There's a search bar for "MLS #, address or map overlay" with a "Browse »" link. Two filters are checked: "Status of Delayed" (with a dropdown menu showing "Active", "Delayed" (selected), and "Pending") and "Contingent not of With Offer" (with a dropdown menu showing "With Offer"). On the right, there's a map showing a street grid with labels like "Menomonee River Parkway", "W Hampton Ave", and "N Mayfair Rd". The map has controls for "Quick Search", "Full Search (legacy)", "Map", "Satellite", and "Overlays".

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

Save Search

Save Type: ☒ New ☐ Existing ☐ Mark as Favorite

Search Name:
Tosa SF

Search Description:

Contact: Me

x Me

Attached Contact.

+ Additional Search Options

Save and Add Subscription Save Cancel

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

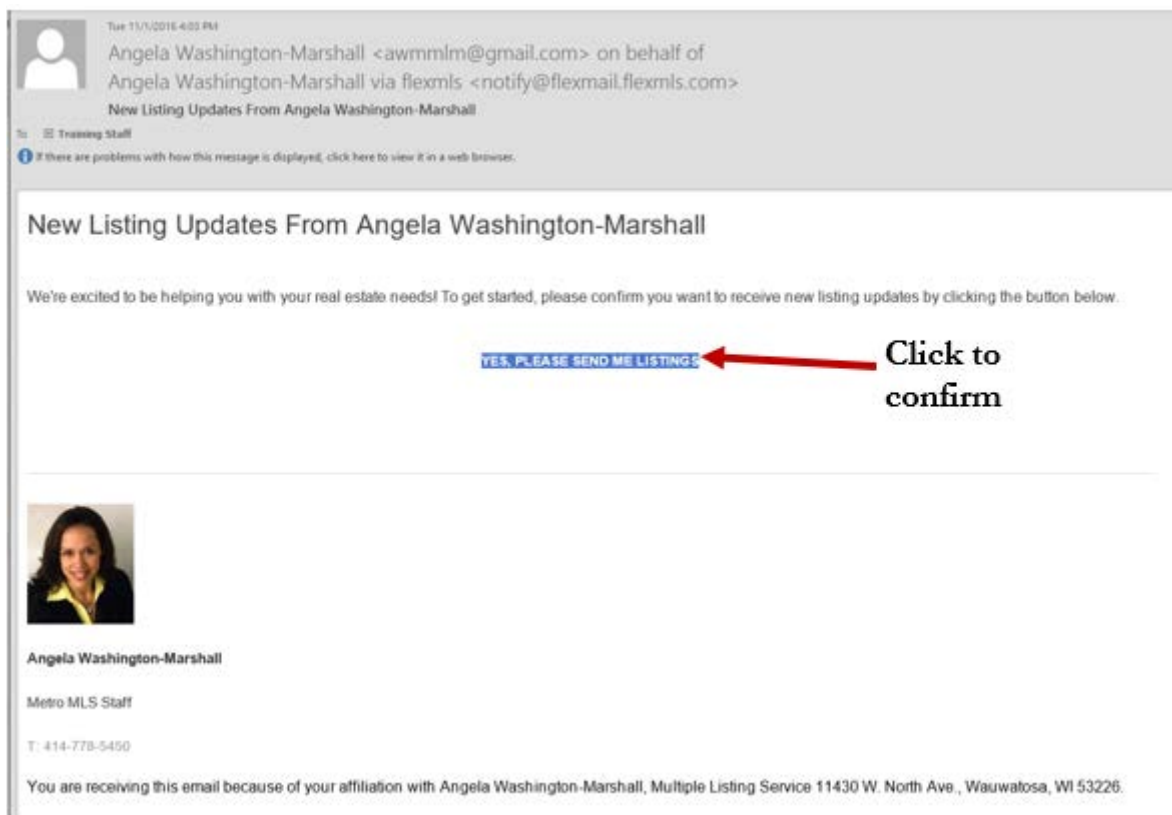
Body: Hello. These are the most current updates for your search. If you have any questions, do not hesitate to contact me!

HTML

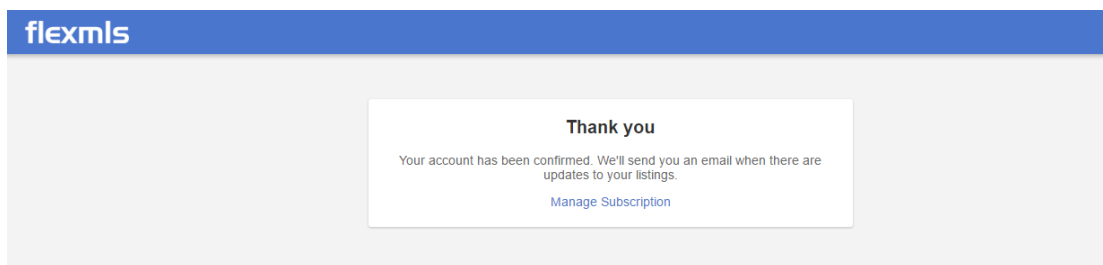
☒ Text

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
 Edit Group List


Name: Joe Buyer

Additional Contact: Jane Buyer

Organization:

E-Mail: hotbuyer@email.com
hotbuyer2@email.com ☒ Notify 

 Add

**Primary:** 414.777.9311

Home:


Office:

Fax:



Mobile:

Other:

Pager:

**Home:** address
address 2
city st zip

Office: address
address 2
city st zip

 ☐ **Reverse Prospecting**
No Additional Info  Add


CANCEL

SAVE CHANGES





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

Buyers

[CONTACT DETAILS](#) [ACTIVITY](#) [SEARCHES/SUBSCRIPTIONS](#) [PORTAL](#) [MESSAGES](#) [NOTES](#) [LISTING NOTES](#) [MORE ▾](#)


**Searches**

Tosa 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 07/09/2017 09:11 AM](#) -
[Reset time and view new since 07/09/2017 09:11 AM](#) -

Subscriptions

 Subscription Buyers
hotbuyer@email.com (Pending), hotbuyer2@email.com 

Search Parameters
Property type Single-Family; Bedrooms between 3 and 4; County of 'Milwaukee'; Garage Spaces between 2.50 and 999999999999; List Price between 175000 and 225000; Municipality of 'Wauwatosa'; Status of 'Active'; Total Bathrooms between 2 and 2.50.; New results include new listings, back on market, price changes, and status changes.

[EDIT CONTACT](#) [REMOVE](#) [DEACTIVATE](#) [TRANSFER](#) [CLOSE](#)

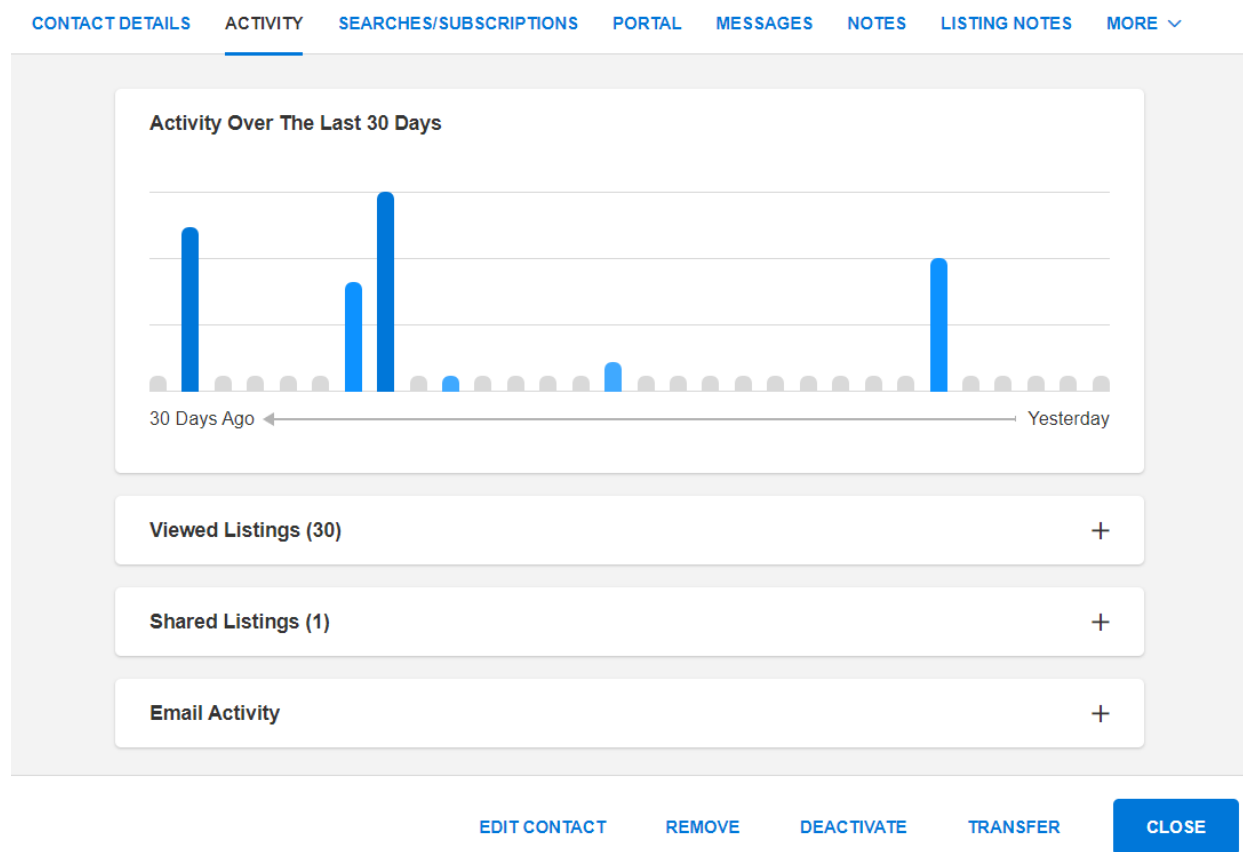
NOTE: If you have multiple searches saved to a Contact and set up on a subscription, all additional email addresses that are set to Notify will receive the results of all subscribed searches.

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



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](#)

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

Viewed Listings are now on the [Activity Tab](#)

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: awmmmlm@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.





Barkleys

[CONTACT DETAILS](#) [ACTIVITY](#) [SEARCHES/SUBSCRIPTIONS](#) [PORTAL](#) [MESSAGES](#) [NOTES](#) [LISTING NOTES](#) [MORE ▾](#)

 **Client Portal:** ☒ ON ☐ OFF
Your portal url: <https://my.flexmls.com/awmmetromls>

[View News Feed](#)

Portal Listing Collections

 Saved	5 Clear
 Recommended	3 Clear
 Hidden	5 Clear
 Hidden by Agent	5 Clear


Portal Activity

Last Active

06/15/2020 02:24 PM

Portal Saved Searches

Most Recent Unsaved Search

 [Most Recent Unsaved Search](#)

[View search parameters](#)

Portal Account

Username: [awmmmlm@gmail.com](#)

[Reset Account](#)

[Change Settings...](#)

[EDIT CONTACT](#) [REMOVE](#) [DEACTIVATE](#) [TRANSFER](#) [CLOSE](#)

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**

 **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		really like want to see
Dec 14, 2017		
1552509		Neighbor has dogs
Oct 3, 2017		
1545195		Wonderful landscaping
Oct 3, 2017		
1550383		8wo9riusoilfujjdwldk
Sep 21, 2017		
1520977		it on the corner
May 16, 2017		
1466614		A lot of grass to cut
Aug 16, 2016		
1445113		1st flr condo
Jun 9, 2016		
1480638		Pretty purple
Jun 9, 2016		
1469353		i don't like being on the corner
Apr 14, 2016		
1413207		great yard
Jul 28, 2015		
1404333		This is a test
Jul 28, 2015		
1404538		this is my note for this listing 8 got your note
Jul 28, 2015		
1238128		The view rocks!
May 26, 2015		
1410585		test this feature
Mar 24, 2015		

[EDIT CONTACT](#)

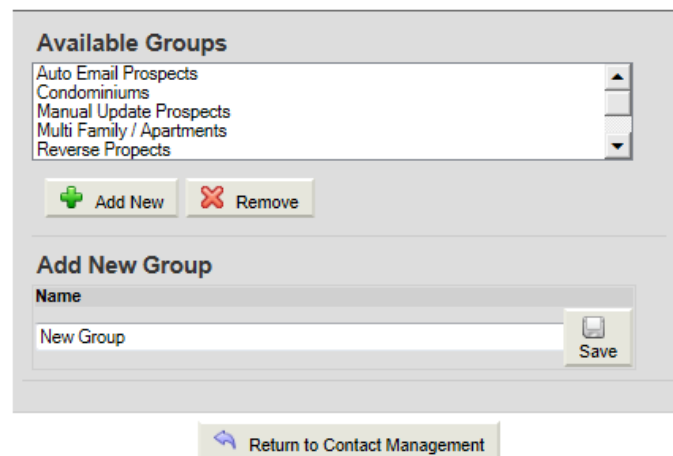
[REMOVE](#)

[DEACTIVATE](#)

[TRANSFER](#)

[CLOSE](#)

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.

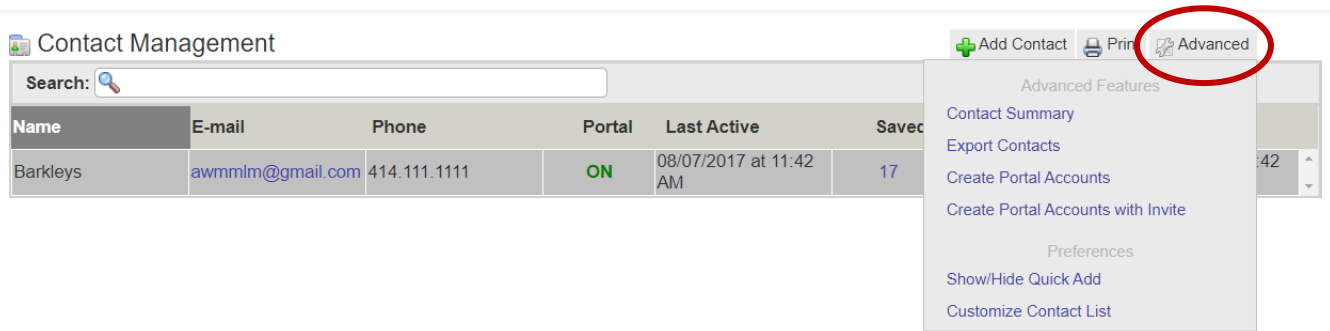


The screenshot shows a web interface for managing groups. At the top, there is a section titled "Available Groups" containing a list box with the following items: "Auto Email Prospects", "Condominiums", "Manual Update Prospects", "Multi Family / Apartments", and "Reverse Prospects". Below the list box are two buttons: "Add New" (with a green plus icon) and "Remove" (with a red X icon). Below these buttons is a section titled "Add New Group". This section contains a text input field labeled "Name" with the text "New Group" entered. To the right of the input field is a "Save" button (with a floppy disk icon). At the bottom of the interface is a button labeled "Return to Contact Management" with a blue arrow icon.

Advanced

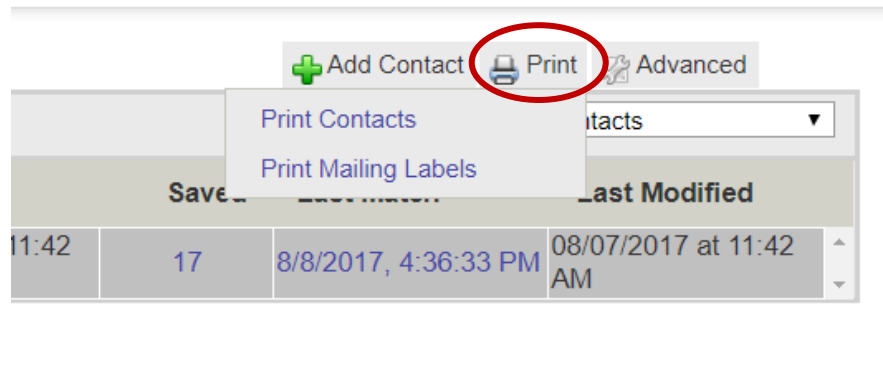
The Advanced function contains the following features:

- **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.

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 12/12/2017 04:04 PM](#)
[Reset time and view new since 12/12/2017 04:04 PM](#)

Subscriptions

Subscription Barkleys 2
- Created October 31, 2017, Updated January 06, 2018
awmmmlm@gmail.com

Search Parameters

Metro MLS, WIREX - except Metro MLS; Property type Single Family; Bedrooms between 3 and 4; County of 'Milwaukee'; Garage Spaces between 2.50 and 999999999999; Municipality of 'Wauwatosa'; Status of 'Active'; Total Bathrooms between 1.50 and 9999; New results include new listings, back on market, price changes, status changes, and open house.
Created October 31, 2017, Updated October 31, 2017

[EDIT CONTACT](#)

[REMOVE](#)

[DEACTIVATE](#)

[TRANSFER](#)

[CLOSE](#)

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.

Edit Saved Search

Would you like to edit the search criteria or the view associated with this search?

Cancel **Edit Search** Edit View

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.

[Return to Contact Management](#)

☆ **Tosa SF 2+ BR**

[Work on behalf of ...](#) [E-Mail](#) [Save](#) [Print](#) [CMA](#) [⋮](#)

[EDIT SEARCH](#) [LIST](#) [DETAIL](#) [PHOTOS](#) [MAP](#) [COMPARE](#) [MESSAGES](#)

View Results: 34

Property Type of [Single Family](#)

MLS #, address or map overlay [Browse »](#)

☒ Bedrooms [between 2 and 4](#)

☒ Contingent [not of With Offer](#)

☒ County of [Milwaukee](#)

☒ Municipality of [Wauwatosa](#)

☒ Status of [Active, Delayed](#)

☒ Total Bathrooms [between 1.50 and 2.50](#)

[+ Add a field to the search](#)

- Additional Search Options

☐ Pictures

☐ Videos

☐ Documents

☐ Virtual Tours

☐ Open House Date

☐ Tour of Homes Date

☐ [within](#) Listing Collection

Quick Search Full Search (legacy)

Map Satellite Overlays


Copyright © 2020, Multiple Listing Service, Inc.

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

[awmmmlm@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 Communities

Body:

HTML ☒

Text ☐

File

Edit

Insert

View

Format

Table

Tools

B

I

U

A

A

Font Family

Font Sizes

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

My Photos


List Photos

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.

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

[awmmmlm@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](#)

Click to remove Subscription.


Copyright © 2020, Multiple Listing Service, Inc.

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.

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 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

[awmmmlm@gmail.com](#)

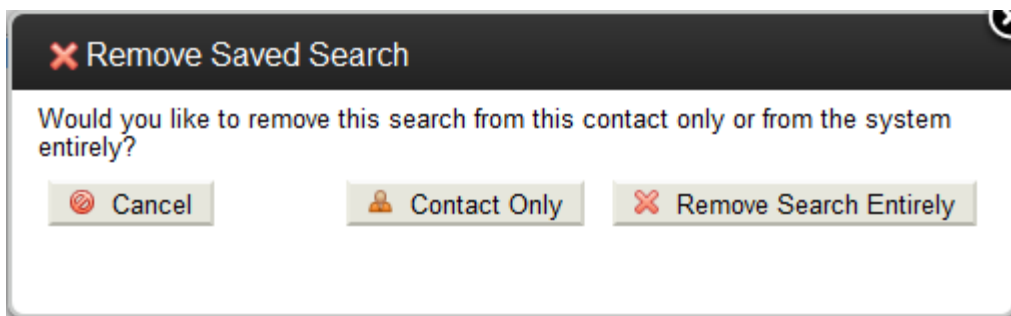
Search Parameters

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](#)

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.


Barkleys

[CONTACT DETAILS](#) [ACTIVITY](#) [SEARCHES/SUBSCRIPTIONS](#) [PORTAL](#) [MESSAGES](#) [NOTES](#) [LISTING NOTES](#) [MORE ▾](#)


**Barkleys** Last activity 6 days ago
Barkley, Europa S (Additional Contact)
BohemianHouse Productions


 **Group:** None

E-mail	Last E-mail Activity	Status	Action
 awmmim@gmail.com	6 days ago	Confirmed,	

**Primary:** 414.111.1111
Home: 4143333333
Office: 4145555555
Fax: 4147777777

Mobile: 4142222222
Other: 4144444444
Pager: 4146666666

 **Home:** 132 Sesame Street, PBSville, WI 53201
Office: 123 Fantasy Island, Nowhere, WI 53201

**Reverse Prospecting:** Disabled

E-mail Activity: Subscription Viewed: -, Manual: 0, Viewed: 3
Total Activity: Manual: 0, Viewed: 32
Listings to Approve: 0
Listings Automatically Sent: 34
Assistant: Mark Jones

Anniversary: newsfeed
Position: CEO - BohemianHouse

[EDIT CONTACT](#) [REMOVE](#) [DEACTIVATE](#) [TRANSFER](#) [CLOSE](#)

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**.

Remove: Barkleys

☒ **All**
☒ **Contact Records**
☒ **Saved Searches**
☒ **Subscriptions**

[Cancel](#) [Remove](#)

