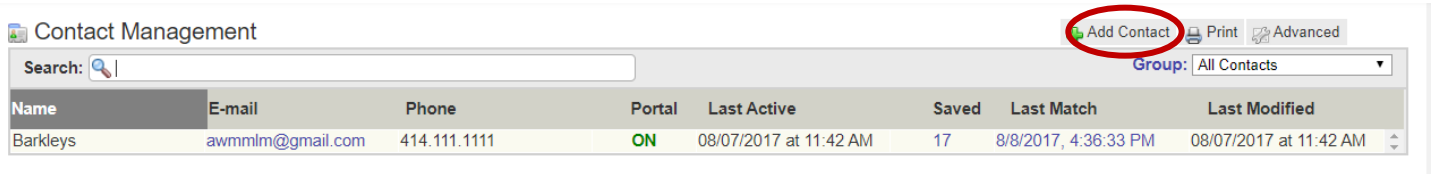


# Adding Contacts and Subscriptions

## 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 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 Quick Search** button.

### Attach Saved Search

Which searches would you like to attach to this contact?

- 53207
- Condo 53202
- CWB Listings
- detailed search
- Delayed Hotsheet
- Fiebrantz CMA Area
- Home area
- Marinette Association Hotsheet

**Create New Quick Search...**

CANCEL ATTACH SEARCH(ES)

After clicking the **Create New Quick Search** button, you will come into Quick Search. Start by selecting your desired property type and status. Enter all your desired parameters to save to the search, and then click the **View Results** link.

Return to Contact Management

# 01 Single Family

Work on behalf of ... E-Mail Save Print CMA

EDIT SEARCH LIST DETAIL PHOTOS MAP COMPARE MESSAGES

View Results: 24

Property Type of Single Family

Location, address or MLS # [Browse »](#)

Municipality of [Wauwatosa](#)

Status of Active X

Listing Date X

List Price between 175000 and 220000 X  
175000 to 220000

Sold Price X

Bedrooms between 3 and 4 X  
3 to 4

Total Bathrooms of 1.5+ X  
1.5 to max

Garage Spaces X

Garage Type X

Body of Water X

Subdivision X

School District X

Street Name X

Start Showing Date X

+ 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

Map Satellite Overlays

2 km  
1 mi

Greenfield

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### Step 3: 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.

Select the listings you would like to email and click the **E-Mail** button.

Return to Contact Management

## 01 Single Family ▾

Work on behalf of ... **E-Mail** Save Print CMA ⋮

EDIT SEARCH LIST **DETAIL** PHOTOS MAP COMPARE MESSAGES

Results: 24 Selected: 9 Reset Columns - 11 + Sort ▾ View [Address & MLS Number \*] ▾

	Price   Status   MLS #	Postal Municipality	List Price	Bedrooms	Full Baths	Half Baths	Garage Spaces	Garage Type	Est. Total Sq. Ft.	Property Type	Est. Acreage	Zip Code	Municipality
<input checked="" type="checkbox"/>	<b>\$175,000</b> 10905 W Derby Ave Wauwatosa, WI 53225 <b>Active</b> / 1655251	Wauwatosa	175,000	4	1	1	2	A	1,368	Single-Family	0.23	53225	Wauwatosa
<input type="checkbox"/>	<b>\$185,000</b> 4511 N 100th St Wauwatosa, WI 53225 <b>Active</b> / 1660356 <b>Status Change</b>	Wauwatosa	185,000	3	2	0	2	A	1,642	Single-Family	0.32	53225	Wauwatosa
<input type="checkbox"/>	<b>\$189,900</b> 10203 W Capitol Dr Wauwatosa, WI 53222 <b>Active</b> / 1649394	Wauwatosa	189,900	3	1	1	2	D	1,296	Single-Family	0.17	53222	Wauwatosa

In the **Listings to E-mail** screen, select the options you would like to include for the emailed listings using the checkboxes in the left side panel. To address the email to a recipient, you can choose click your mouse in the **To:** field to present a list of your saved Contacts; or you can manually enter an email address in the field noted as such. To preview the email before sending, click the **Preview** button at the bottom of the screen; to email the listings, click the **E-Mail** button. Once you see the confirmation screen that the link was mailed, click the **Return to Search Results** link at the upper left corner of the screen.

[Return to Contact Management](#)

[Return to Search Results](#)

<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;"> <b>Listings to E-Mail</b>  <input type="radio"/> Current Listing (1)  <input checked="" type="radio"/> Selected (9)  <input type="radio"/> All Results (24)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>Start Position:</b> Details         </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>Version:</b> Public         </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>View:</b> [Address &amp; MLS Number *]         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Detail         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Full Report Addtl Photos         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> History         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Documents         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Open Houses         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Mortgage Calculator         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Photos         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Video(s)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Virtual Tour         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Map         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Compare         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Branding         </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>Card Orientation:</b> Top         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Accent Background Color         </div>	<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;"> <b>Recipients</b> </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>From:</b> angela@metromls.com [primary]         </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>To:</b> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-right: 10px;">           * Boss Lady         </div> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-right: 10px;">           angela@metromls.com         </div> <span style="font-size: small;">Add New Contact</span> </div> <div style="padding: 5px; margin-bottom: 5px;"> <span style="font-size: x-small;">1 contact selected</span> </div> <div style="padding: 5px; margin-bottom: 5px;"> <span style="font-size: x-small;">You may also enter one or more additional e-mail addresses below:</span> </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Send a copy to me  <input checked="" type="checkbox"/> Notify me the first time the recipient views this page         </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>How would you like to send this e-mail?</b> Use Flexmls         </div> <div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;"> <b>Message</b> </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>Templates:</b> Initial Listings Send (Default)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>Subject:</b> Initial Listings         </div> <div style="padding: 5px; margin-bottom: 5px;"> <b>Message body:</b> <div style="border: 1px solid gray; padding: 5px; min-height: 150px;"> <p>Hello. These are the listings that currently match your search criteria. I have created a subscription for listings matching this criteria to be sent to you automatically.</p> <p>You should have received an opt-in request with the subject line, 'New Listing Updates' that includes my name. Make sure you open that email and click the 'Yes, please send me listigns button' so that listings will be sent automatically to you.</p> <p>If you have any questions, do not hesitate to contact me!</p> </div> </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="radio"/> HTML <input checked="" type="radio"/> Text         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Signature:         </div> <div style="padding: 5px; margin-bottom: 5px;"> <pre> ----- Angela Washington-Marshall, GREEN, e-PRO, The Metro MLS Support Staff Metro MLS Staff Multiple Listing Service 11430 W. North Ave. Wauwatosa, WI 53226 Office - (414) 778-5450 angela@metromls.com http://www.metromls.com -----           </pre> </div>
--	--

Save / Reset Selections

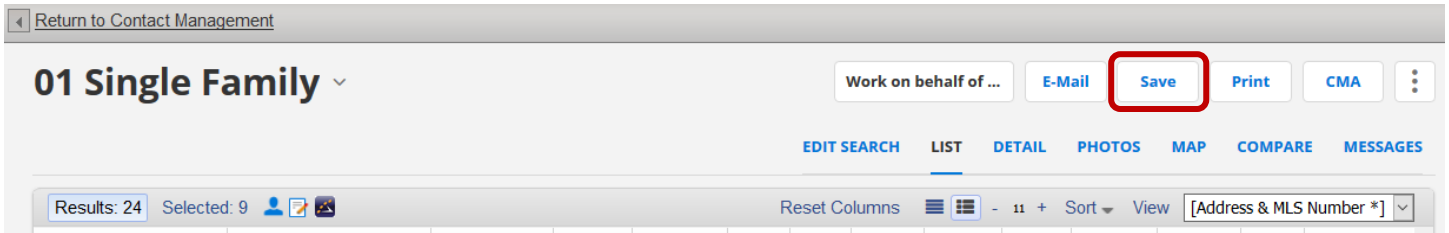
Preview

E-Mail

**NOTE:** If you would like to save the options you checkmarked for emailing more listings in the future, click the Save link at the bottom of the blue panel.

## Step 4: Save Search and Add Subscription

Once you are back at the Search Results screen, click the **Save** button; this will take you to the Save Search screen.



Return to Contact Management

01 Single Family ▾

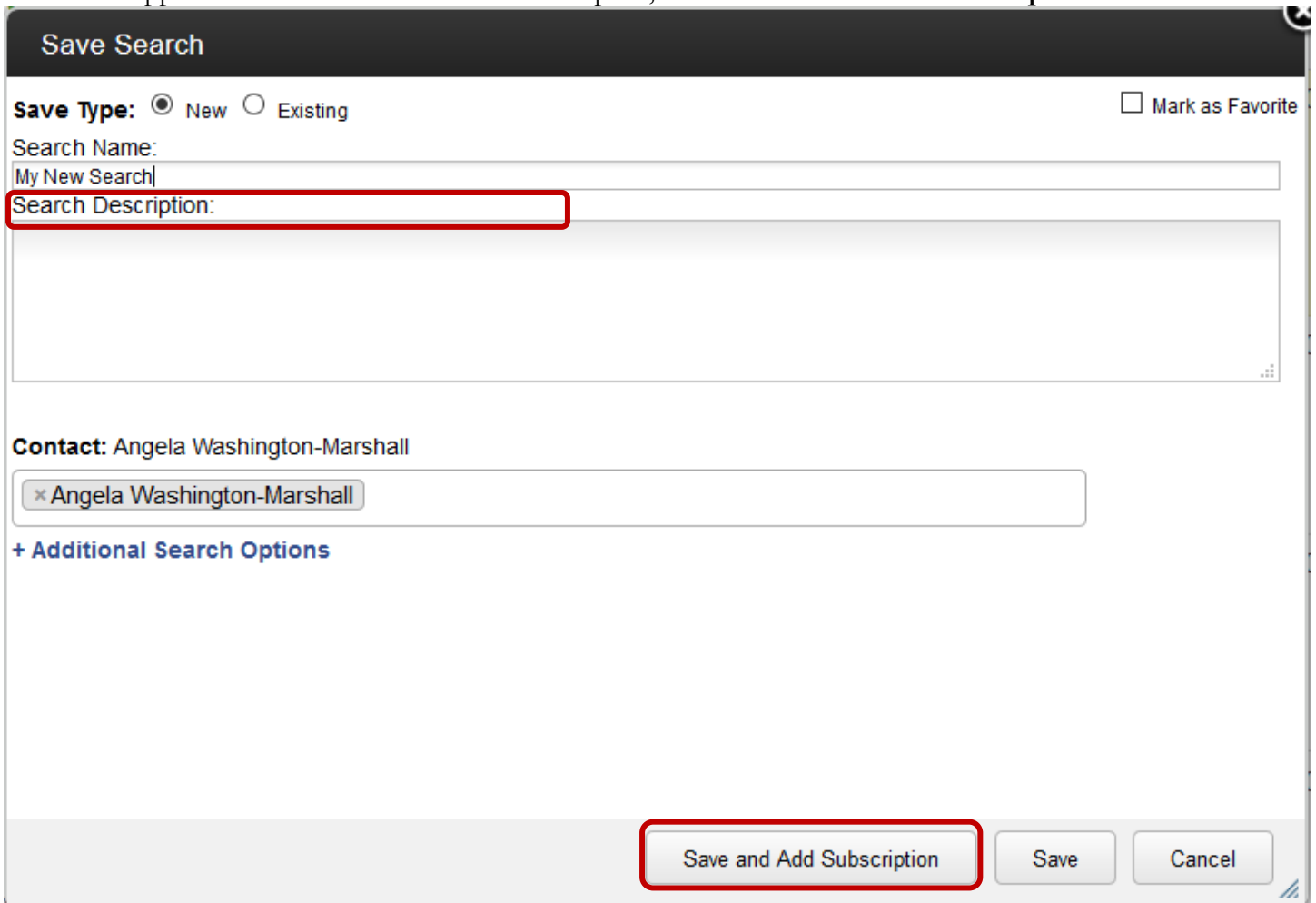
Work on behalf of ... E-Mail **Save** Print CMA ⋮

EDIT SEARCH LIST DETAIL PHOTOS MAP COMPARE MESSAGES

Results: 24 Selected: 9 [User Icon] [Image Icon]

Reset Columns [Grid Icon] - 11 + Sort ▾ View [Address & MLS Number \*] ▾

This is where you give your search a name by typing it in the 'Search Name' field. Your Contact's name should appear in the Contact section. Once complete, click the **Save and Add Subscription** button.



Save Search

Save Type:  New  Existing  Mark as Favorite

Search Name:  
My New Search

Search Description:

Contact: Angela Washington-Marshall

× Angela Washington-Marshall

+ Additional Search Options

Save and Add Subscription Save Cancel

This will take you to the **Add 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.

### Add Subscription

**General Subscription Options**

Subscription name: Subscription My New Search

Send notification of new listings to:  
 You (sender)  Selected contacts  
 Send me an email when a contact clicks the link  
 Enable Preview Mode ?

Contacts: x Angela Washington-Marshall 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**  
Address & MLS Number

**Address & MLS Number:**  
Status, Postal Municipality, List Price, Address, Bedrooms, Full Baths, Half Baths, Garage Spaces, Garage Type, Est. Total Sq. Ft., Property Type, Est. Acreage, Zip Code, 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 Cancel