Contact Portal – Classic Version

The Contact Portal is a new feature to help consolidate your communications with your Contacts. If you choose, your Contacts will now have access to their own dashboard which will contain information you send to them. You'll have the ability to give your Contacts a login name and password to the Portal so that they can save listings to their own carts, and send you messages regarding listings. The Contact Portal is set up from the Contact Management screen. Before creating Contact Portals, you must configure your (the agent's) Portal settings in FlexMLS.

Portal Preferences for the Agent

Portal Preferences allows you to set up the name for your Portal, default e-mail greeting, and default Portal Preferences. To access this screen, go to Preferences > Portal Preferences in the main menu tree.

Portal Name - Set up a name for your Portal. The name of the Portal is displayed in the web address that your Contacts will use to access the Portal. This name is used by all Contacts who log into your Portal, so choose your name accordingly. Each Contact will then log in using their username and password to enter their personalized site.

E-mail Greeting - Set up your standard e-mail greeting that will be used for Portal e-mails. A default greeting is provided, or you may customize your greeting. You may also customize each greeting individually before it is sent. You can also choose to have the initial greeting e-mail automatically sent or withheld upon account creation.

Default Subscription Settings – The settings in this section determine what events will trigger a Subscription to send listings to your Contacts.

Default Subscription Settings		
	Event	**Add to News Feed by Default**
	New	☑
	Price Change	☑
	Sold	☑
	Open House	☐
	Pending	☑
	Back On Market	☐
	Extension	☐
	Status Change	☑
	Use inherited defaults	

Portal Preferences - The settings in this section determine what statuses will be retained in your searches, how to display listings from Subscription links, the Start Position the listings to where the listings will open, The List View and Sort that will be used, and select which tabs of the Search Results screen you would like to make visible by default on all Contact Portals.

Portal Preferences

Exclude these listing statuses from appearing in the news feed unless the status is included in the search:
- ☑ Active
- ☐ Delayed
- ☑ Pending
- ☑ Closed
- ☑ Expired

Allows you to control what happens to listings that were previously sent to a Contact via Subscription after the status no longer matches the Contact search.

Listing links from email show:
- ○ MLS Default (Show News Feed)
- ● News Feed
- ○ Emailed Listings
- ○ Saved Search

Controls how your Contacts view listings in Subscription emails.

Start Position: Default

List view
- ○ [Address & MLS # LM SM]
- ● Use view associated with search/link

Choose what tab you would like the listings email link to open.

List sort
- ● Sort listings by New or Recently Changed first
- ○ Use the sort associated with the view

Choose a view to display on the List tab and how to sort those listings.

- ☑ Detail
- ☑ Report Full Report Addtl Photos +
- ☑ Documents
- ☑ Mortgage Calculator
- ☑ Photos
- ☑ Video(s)
- ☑ Virtual Tour
- ☑ Map
- ☑ Messages
- ☑ Branding

Choose which tabs of information you would like displayed using the check box options.

Card Orientation: Top

Select the orientation of your card on the screen (left, right, top, or bottom).

Accent Background Color

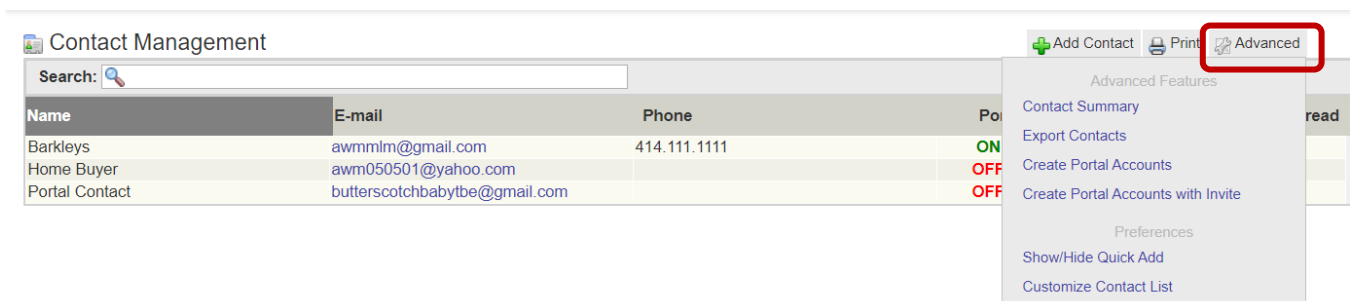*Use to customize the background color of your Portal.*

Save and View   Save

The options in the '**Listing links from email show**' are defined as follows:

- **MLS Default (Show News Feed)** – opens to show listings in the News Feed. This is the default for all Subscriptions.
- **News Feed** – Same as MLS Default.
- **Emailed Listings** – opens to show only the listings sent in that particular email.
- **Saved Search** - opens to show the listings currently in the search saved to the Contact.

NOTE: The default Detail report listed in this screen is the 1-Line Report; make sure you change this to the data sheet you would like your Contacts to view.

Contact Management Screen

Under the **Advanced** menu, you have settings that allow you to create Portal accounts with or without notification and affect the way you view your Contact List on the Contact Management screen.

You may create a Portal account for all Contacts at one time using one of the 'Create Portal' choices from the **Advanced** menu. Clicking on either **Create Portal Accounts** or **Create Portal Accounts with Notification** will accomplish this. The difference between the two is 'Create Portal Accounts with Notification' will immediately send an e-mail to all Contacts alerting them a Portal has been created for them; a system generated username based on their Display Name, and password will also be included in the e-mail. This can be changed at any time, by either the Contact or you. The agent can change both the username and password at any time; the Contact can only change their password.

NOTE: Creating a single Contact Portal for the first time is recommended.

The **Customized Contact List** feature in Contact Management allows you to include additional columns to show you whether the Contact has a Portal account, the date/time of their last login, listings you have recommended, listings you have hidden from their search, and their chosen saved and hidden listings. Clicking **Advanced > Customize Contact List** link brings you to the following screen:

In this screen, you can click on the green plus (**+**) sign of an item to add it to your Contact List view. To remove an item, click the red **X** for that item. You may also order the columns in any format you desire. After making your selections, click the **Save Changes** button.

Your Contact Management screen results will look like the following screen.

Portal link

The Portal link is only accessible from the Contact within Contact Management. As stated before, you may create multiple Portals at one time using the options under the **Advanced** menu in Contact Management. You may also create Portals one at a time for each Contact.

One way to create a Portal for a Contact is to start at Contact Management. Under the Display Name column, click the Contact you would like to create the Portal for. The information window for that Contact will display. Click the **Portal** link; the option for enabling the Portal will display. Enable the Portal by clicking the '**ON**' button.

Next, click the **Invite to Portal** button to view the invitation to your contact; make any edits you would like. Click **Send** to email the invitation

A email notification will be sent to the Contact's primary email address. Included is a brief description of the Portal. At this point, they will click the '**Sign Up**' button to begin access to their Portal.

Your Contact will be routed to the sign up screen for thie Portal. In this screen, their primary email address will already be listed; this will be their user name to log into their Portal. They will enter their first and last names, create a password 4-8 characters in length and then click **Confirm**. At this point, they will be logged into their Portal.

In the agent's FlexMLS account, the options on the Portal link will appear. This includes options to view the agent version of the Contact's Portal (**View Portal** link), manually e-mail the Portal link using **Reset Account** (agent's Portal URL), access to the default listing collections that come standard with all Contact Portals, a notification setting for log in activity for that Contact, and settings to change that individual Contact's Portal options (**Change Settings** link).

You can also disable and re-enable the Portal (**On** and **Off** radio buttons), view Contact activity, such as last login, and listings marked as Saved and Hidden. You can view listings you (the agent) have marked as Recommended and Hidden by Agent. Your Contact can save listings to Collections they create; the contents of these can also be viewed by you.

Metro MLS

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

Client Portal: ⦿ ON ◯ OFF 🖼 **View Portal**
Your portal url: https://portal.flexmls.com/awmmetromls

No listings automatically sent to this contact

Portal Listing Collections

Viewed Listings are now on the **Activity Tab**

🛒 Saved   0 Clear
🛒 Recommended   0 Clear
🛒 Hidden   0 Clear
🛒 Hidden by Agent   0 Clear

Portal Activity
Last Active

✔ Send a message to me when Metro MLS logs into the portal on a computer

Most Recent Unsaved Search
No unsaved searches

Portal Account

[Reset Account]

Change Settings...

EDIT CONTACT   REMOVE   DEACTIVATE   TRANSFER   [CLOSE]

NOTE: If you had a Contact that had a Portal created before January 26th, 2016, you may have Portal Listing Collections preceded by the word 'Archived'.

The **Change Settings** link allows you edit settings for the way **that** particular Contact views their Portal, such as the Start Position (which screen appears when they first click the link to open the sent e-mail), the view used to list properties in the List tab, how to sort listings on the List tab, and other tabs of information to include, such as report type, documents, photos, virtual tours and maps. Once you have made your selections, click **Save Settings**.

For an agent to mark listings as **Recommended** and/or **Hidden by Agent**, they will need to go to the Contact's **Searches/Subscriptions** link, highlight the appropriate search in the Searches box, and then click the **View All** link in the Results box.

This will route the agent to the Search Results screen showing all properties for that search. On the List tab, next to the address of the listing, you will see four icons. To add a listing to the Contact's **Recommended** collection, click the 'suitcase' icon; to hide a listing from the Contact's search, click the universal 'no' icon. This will place that listing in the **Hidden by Agent** collection.

NOTE: Your Contacts will **not** receive an automatic update *notice* of new search result updates through their Portal; this is only done through having your Contact set up on a subscription.

Messages link

The Messages link archives all message communications between you and that Contact, along with date and time stamp of message sent. Here, you can create, read, reply to, and delete messages. You may also expand all and collapse all messages using the **Expand all messages** and the **Collapse all messages** links at the top of the Contact Messages window.

You may also search messages with that Contact using the **Search messages** link. This tool allows you to search Contact messages using message type, Contact name, and date range.

Listing Notes link

On the Listing Notes link, you can view notes a Contact has made on any of their listings using the Listing Notes function. Listing Notes are specific to the Contact and Listing in question.

A Contact can make a note on any listing in their Portal by clicking on the **Actions** button located on the thumbnail photo of the listing on the List tab; this will present options, including a button for **Listing Notes**.
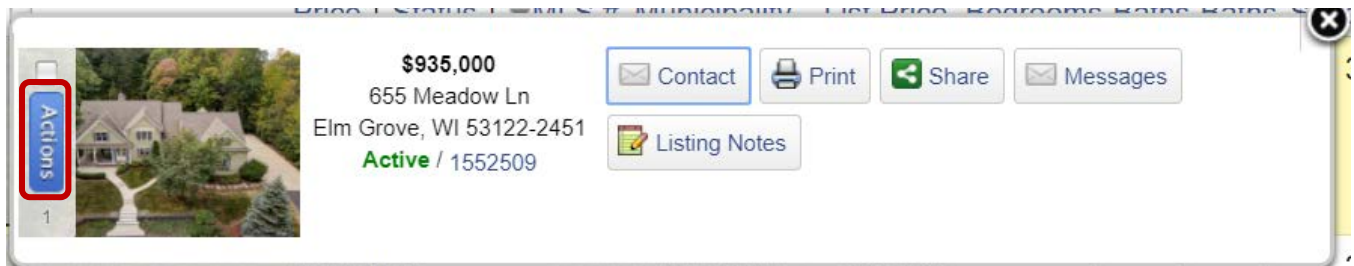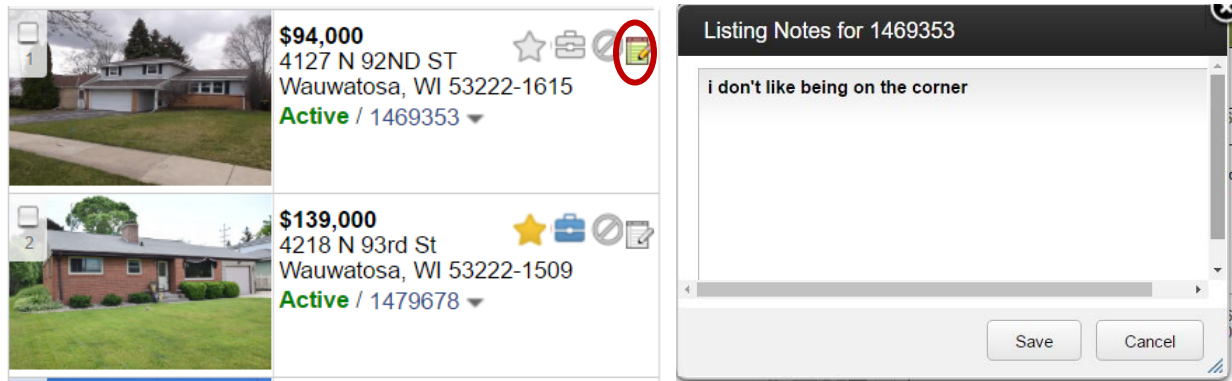

NOTE: If you click **View All** on a search in Searches/Subscriptions and see the 'notepad' icon on a listing is yellow, that means the Contact has made a private note on that listing; you can click the icon to read the note.

Links link

The Links link keeps a list of all manually sent e-mails for that Contact. The links will remain for 30 days from the date sent. On this tab, you can view the content of the 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 remove them from the Searches and Reports section of the Contact's Portal dashboard. Deletions from this screen do not affect the My Sent E-mails screen.