

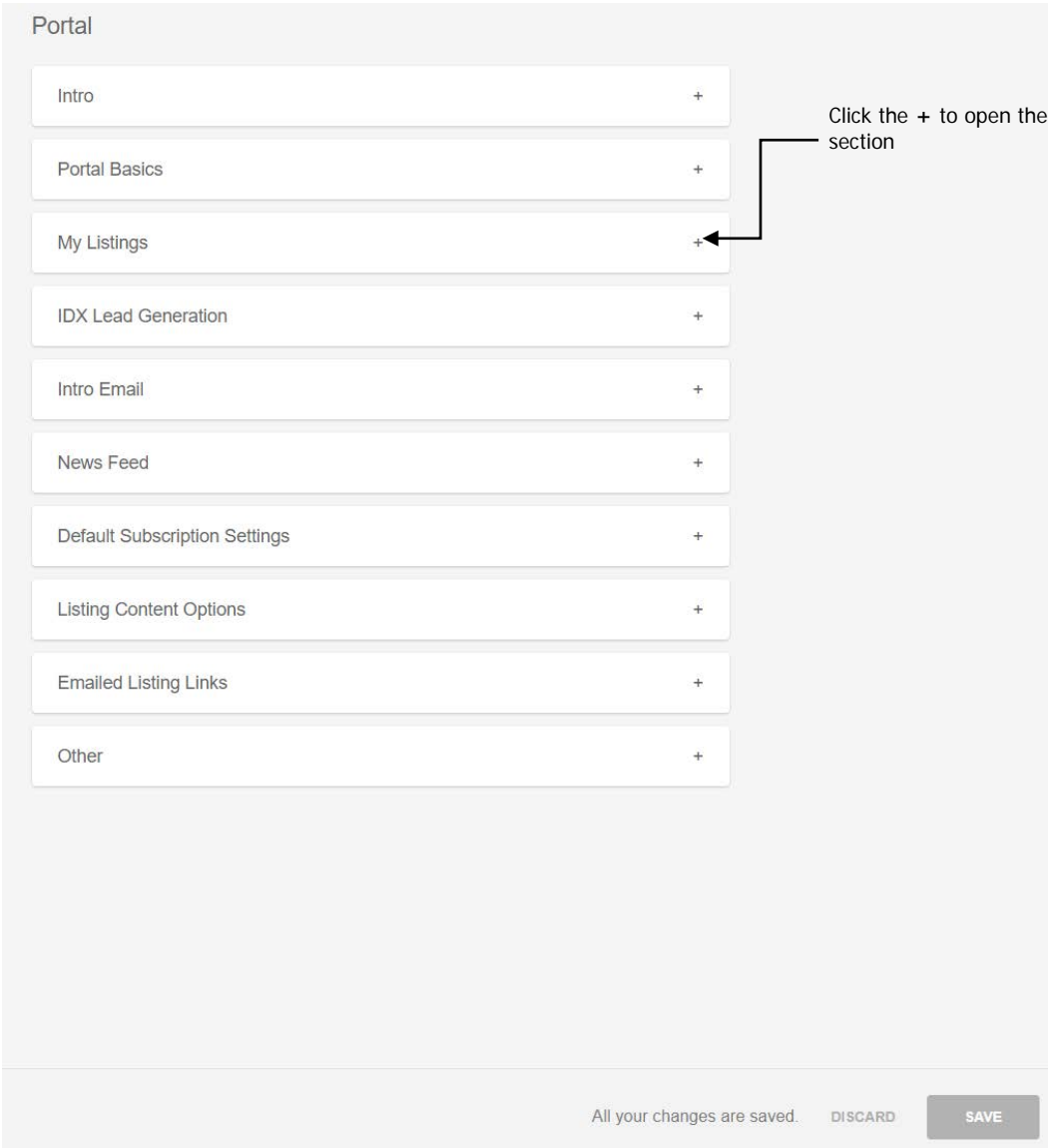
‘New’ Contact Portal

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 configure the default global settings for all of your Contact Portals. To access this screen, go to Preferences > Portal Preferences in the main menu tree. The Portal Preferences are organized into nine sections.

NOTE: IDX Lead Generation is not enabled for our MLS.



The screenshot displays the 'Portal' configuration interface. It features a list of nine sections, each with a plus icon to its right. An annotation with an arrow points to the plus icon of the 'My Listings' section, stating 'Click the + to open the section'. At the bottom of the interface, a status bar indicates 'All your changes are saved.' and includes 'DISCARD' and 'SAVE' buttons.

Portal	
Intro	+
Portal Basics	+
My Listings	+
IDX Lead Generation	+
Intro Email	+
News Feed	+
Default Subscription Settings	+
Listing Content Options	+
Emailed Listing Links	+
Other	+

Click the + to open the section

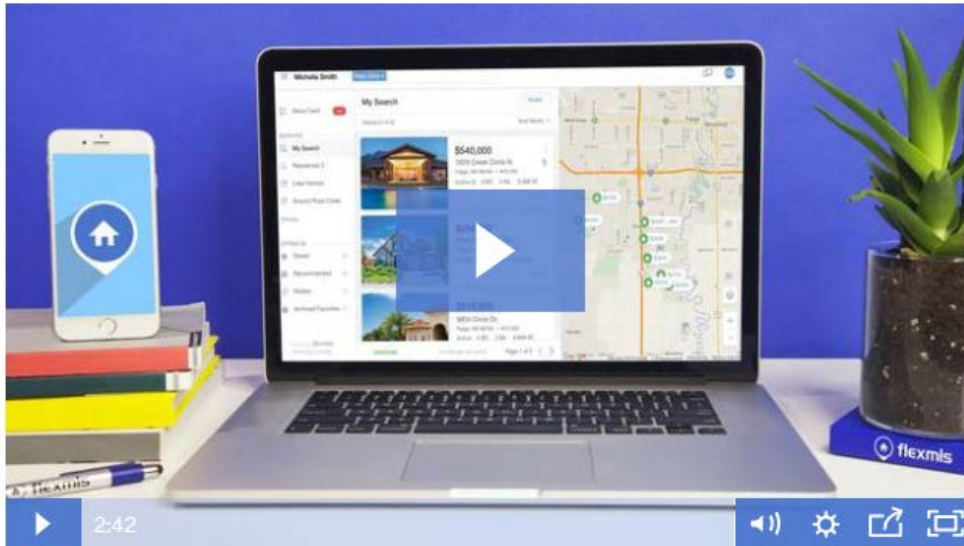
All your changes are saved. [DISCARD](#) [SAVE](#)

Intro – This section contains a video describing the features of the Contact Portal, along with a feature users can try to ‘test drive’ the new portal without committing to it.

Intro

A new way to collaborate

Watch the video to learn more about the all new Flexmls Portal.



Click the – to close section

Portal Basics - Set up a name to be included in the URL 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 (email address) and password to enter their personalized site. You can enable and disable it here, if you wish.

Portal Basics

Portal Name

Portal URL

<http://portal.flexmls.com/awmmetromls>

Portal Enabled



My Listings – allows listing agents the option to show their active listings on the Contacts’ desktop and mobile web Portal home page.

Portal

Intro

+

Portal Name & URL

+

My Listings

–

Listing Status

Show On Home Page

Active

☒

Intro Email – Set up your standard e-mail greeting that will be used for introduction Portal emails. 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.

Intro Email

–

Intro Email

When creating new accounts, automatically send invite

☒

A Portal has been Created

FILE ▾ EDIT ▾ VIEW ▾ INSERT ▾ FORMAT ▾ TABLE ▾

B *I* U **A** ▾ **A** ▾ VERDANA ▾ 10PT ▾

☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷

☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷

☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷

MY PHOTOS LIST PHOTOS

Welcome to your personalized portal that we can use to work together. See what's on the market, save listings you're interested in, and more. Follow the link below to get started.

POWERED BY TINYMCE

News Feed – this setting applies to your Contacts who have active Subscriptions attached to their searches. If a listing they received in a prior Subscription email changes to any status other than what you have saved in their search, you can retain that listing in their news feed showing the updated status.

News Feed

Listing Status

Show In Portal

Active

☒

Pending

☐

Closed

☐

Expired

☐

Coming Soon

☒

Default Subscription Settings – allows the Contact to subscribe to searches by simply clicking a single "Subscribe" button. This one-click option is made possible by the Default Subscription Settings, which allows the agent to control what events trigger a new listing update for the search.

Default Subscription Settings

New

☒

Price Change

☒

Sold

☒

Open House

☐

Pending

☒

Back On Market

☐

Extension

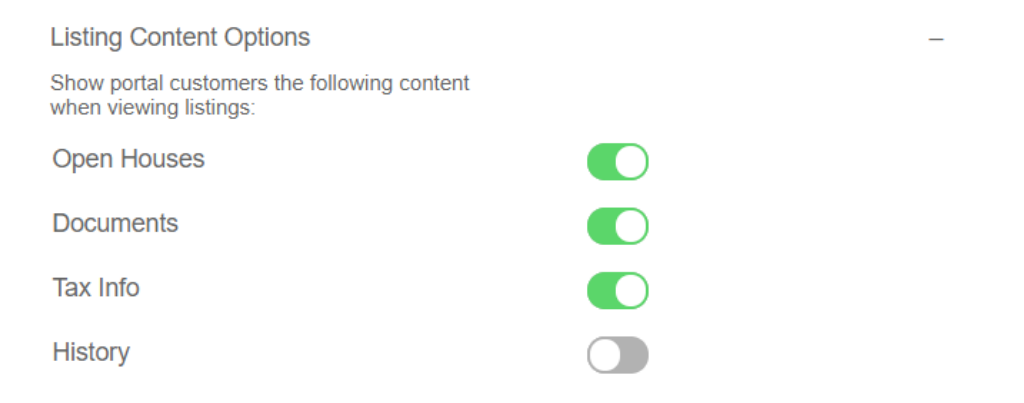
☐

Status Change

☒

USE INHERITED DEFAULTS

Listing Content Options – allows the agent to control what content shows to their Portal customers. These options are like the options the agent sets when they send a manual email in FlexMLS where they can include or exclude certain content such as documents, open house info, and tax reports.

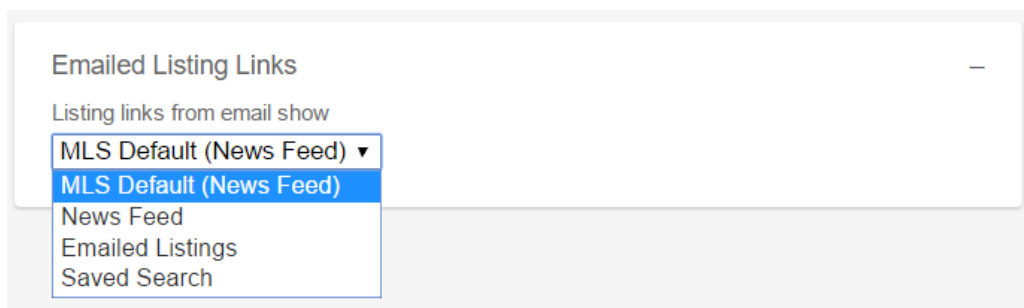


The screenshot shows a settings panel titled "Listing Content Options" with a minus sign in the top right corner. Below the title is the instruction "Show portal customers the following content when viewing listings:". There are four toggle switches: "Open Houses" (green, on), "Documents" (green, on), "Tax Info" (green, on), and "History" (grey, off).

Content Type	Status
Open Houses	On
Documents	On
Tax Info	On
History	Off

Emailed Listing Links – this setting applies to your Contacts who have active Subscriptions attached to their searches. When opening the listing link in the Subscription email, you can choose to open it the following ways:

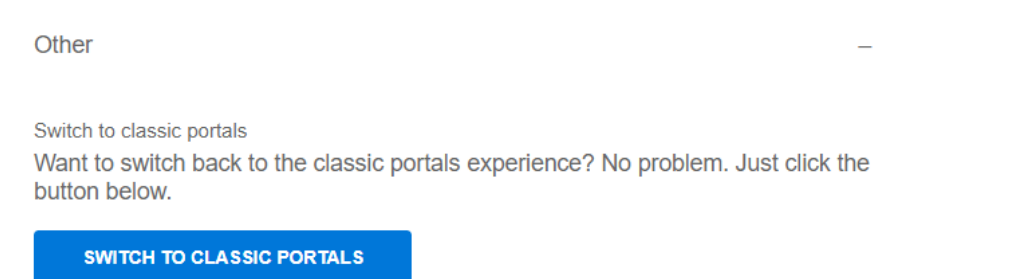
- **MLS Default (News Feed)** – the link will open to listings previously sent in that Subscription (up to a history of 50) with the most recent at the top of the list.
- **Emailed Listings** – in the link, you will only view the listings that were updated for THAT email.
- **Saved Search** – the link will open to the listings in the Contact's saved search, with the most recent at the top of the list. If they have multiple searches, it will open to the first search in the list.



The screenshot shows a settings panel titled "Emailed Listing Links" with a minus sign in the top right corner. Below the title is the instruction "Listing links from email show". A dropdown menu is open, showing four options: "MLS Default (News Feed)" (selected and highlighted in blue), "MLS Default (News Feed)", "News Feed", "Emailed Listings", and "Saved Search".

Listing Link Option
MLS Default (News Feed) ▼
MLS Default (News Feed)
News Feed
Emailed Listings
Saved Search

Other – this setting allows you to revert to the Classic Portal.

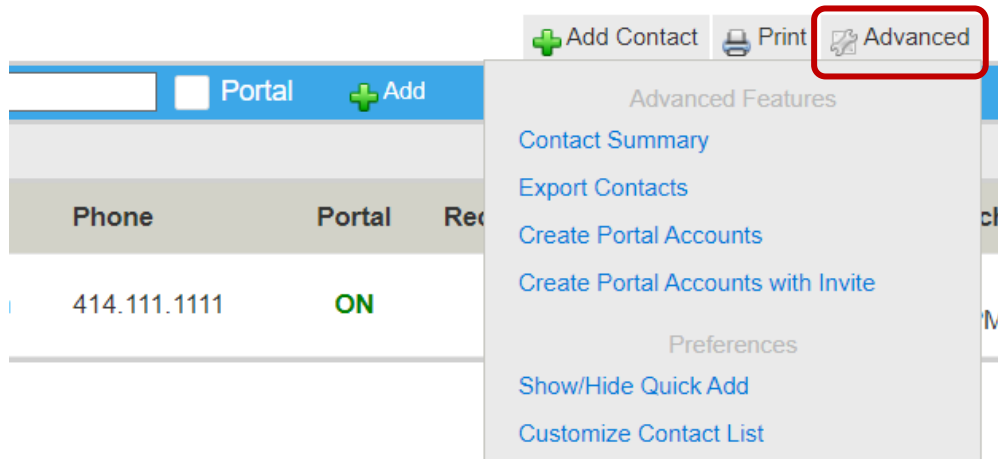


The screenshot shows a settings panel titled "Other" with a minus sign in the top right corner. Below the title is the instruction "Switch to classic portals" and a paragraph: "Want to switch back to the classic portals experience? No problem. Just click the button below." At the bottom is a blue button with the text "SWITCH TO CLASSIC PORTALS".

SWITCH TO CLASSIC PORTALS

Contact Management Screen

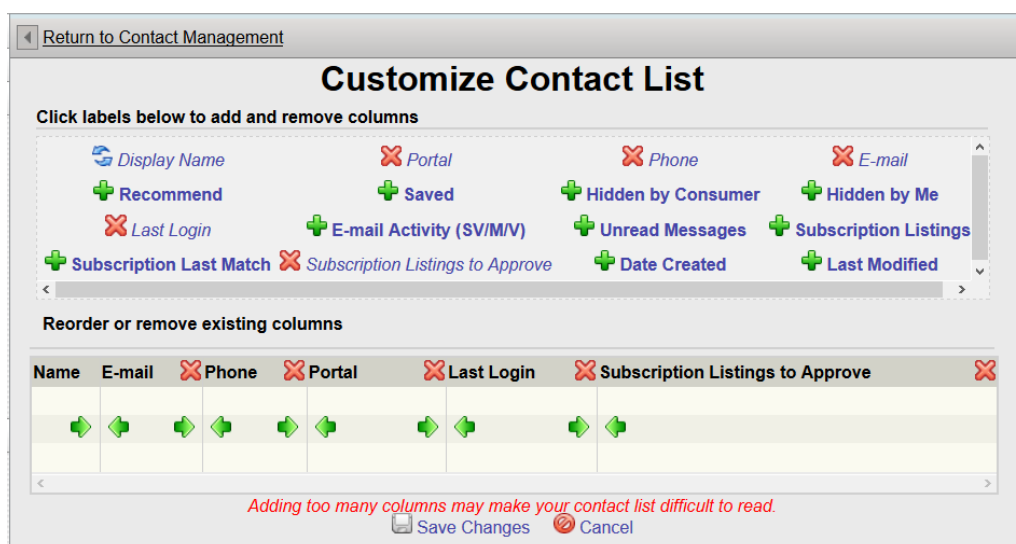
Under the **Advanced** menu, you have settings that allow you to create Portal accounts with or without notification and affect the way you view your Contact List on the Contact Management screen.



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 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 on the **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 similar to the following screen.

Contact Management

Quick Add: First Name: Last Name: E-mail:

☐ Portal Add

Search:

Group:

All Contacts

Name	Activity (Last 7 Days)	Date Created	E-mail	Phone	Portal	Recommend	Last Active	Last Match
Barkleys	<div></div>	12/17/2007	awmmmlm@gmail.com	414.111.1111	ON	2	07/10/2018 at 08:00 AM	7/9/2018, 1:29:07 PM


Portal link

The Portal link is only accessible from the Contact's file 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.

To create a Portal for an existing Contact, start at Contact Management. Under the Name column, click the Contact you would like to create the Portal for. The data window will open for that Contact. Click the **Portal** link; the option for creating the Portal will display. From here, you can enable the Portal by clicking the 'On' radio button and email Portal invitation by clicking **Invite to Portal** button.

Test Contact

CONTACT DETAILS
ACTIVITY
SEARCHES/SUBSCRIPTIONS
PORTAL
MESSAGES
NOTES
LISTING NOTES
LINKS


Client Portal: ☐ ON ☒ OFF
Your portal url: http://my.flexmls.com/awmmetromls

No listings automatically sent to this contact

Portal Listing Collections

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

Portal Activity
Last Active

Most Recent Unsaved Search
No unsaved searches

Portal Account

Invite to Portal
Change Settings

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


EDIT CONTACT
REMOVE
DEACTIVATE
TRANSFER
CLOSE

Once the Portal has been enabled for the Contact, the Portal Collections will appear; when the Contact has successfully logged into the Portal, options for the Portal Activity and Portal Account sections will appear. This includes options to view the date and time the Contact last logged into their Portal, resend the Portal link (agent's Portal URL) using the **Reset Account** button (this also will provide them the opportunity to reset their password, if needed), and access to the Contact's Portal Listing Collections. There are also settings to edit what listing statuses are allowed to be shown in the Contact's News Feed and to what their Subscription links will open to (if a Subscription is active on that Contact).

NOTE: Settings on the Portal tab will affect only that particular Contact.

Angela

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


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

[View News Feed](#)

Portal Listing Collections

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

Portal Activity
 Last Active 07/10/2018 08:00 AM

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](#)

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' (shown below).

Portal Listing Collections		
Saved	2	Clear
Recommended	2	Clear
Hidden by Consumer	1	Clear
Hidden by Me	2	Clear
Archived Favorites	1	Delete
Archived Likes	1	Delete

When you click the **Create Portal Account** button, a Portal creation notification will be automatically emailed to that Contact with instructions on how to log into their Portal (shown below).

● A Portal has been Created for You!

Yahoo/Inbox ★



● **Angela Washington-Marshall, The Metro MLS Support Staff via flexmls** <notify@flexmail.flexmls.com>

To: awm050501@yahoo.com



Jul 10 at 8:53 AM



Angela Washington-Marshall, The Metro MLS Support Staff has
invited you to connect.

Welcome to your personalized portal that we can use to work together. See what's on the market, save listings you're interested in, and more. Follow the link below to get started.

CONNECT

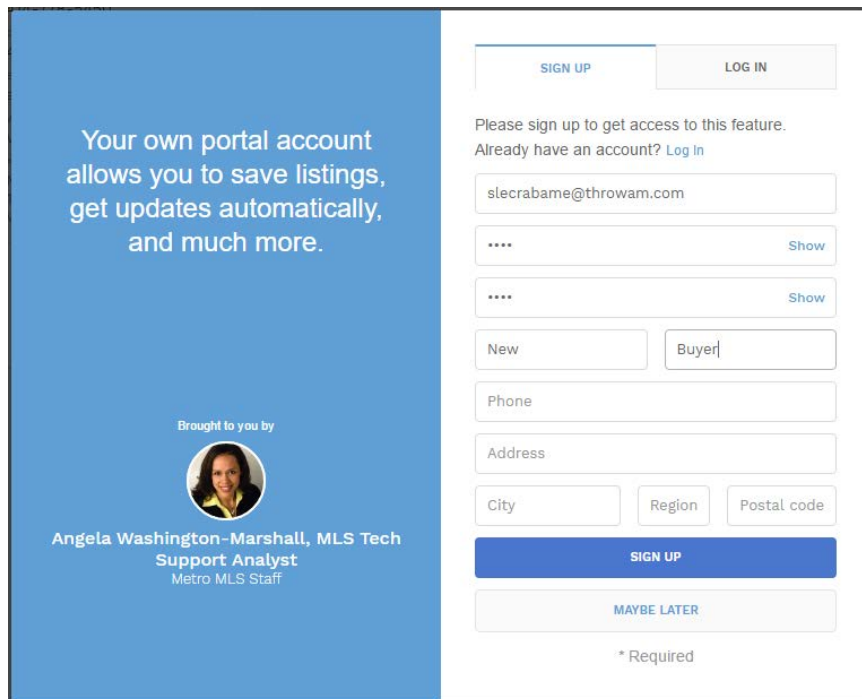


Angela Washington-Marshall, The Metro MLS Support Staff, EcoBroker, GREEN, e-PRO
Metro MLS Staff
Multiple Listing Service
11430 W. North Ave.
Wauwatosa, WI 53226
414-778-5450
awm050501@yahoo.com
<http://www.metromls.com>

You are receiving this email because of your affiliation with Angela Washington-Marshall, Multiple Listing Service 11430 W. North Ave., Wauwatosa, WI 53226.

[Unsubscribe or manage notifications by clicking here](#)

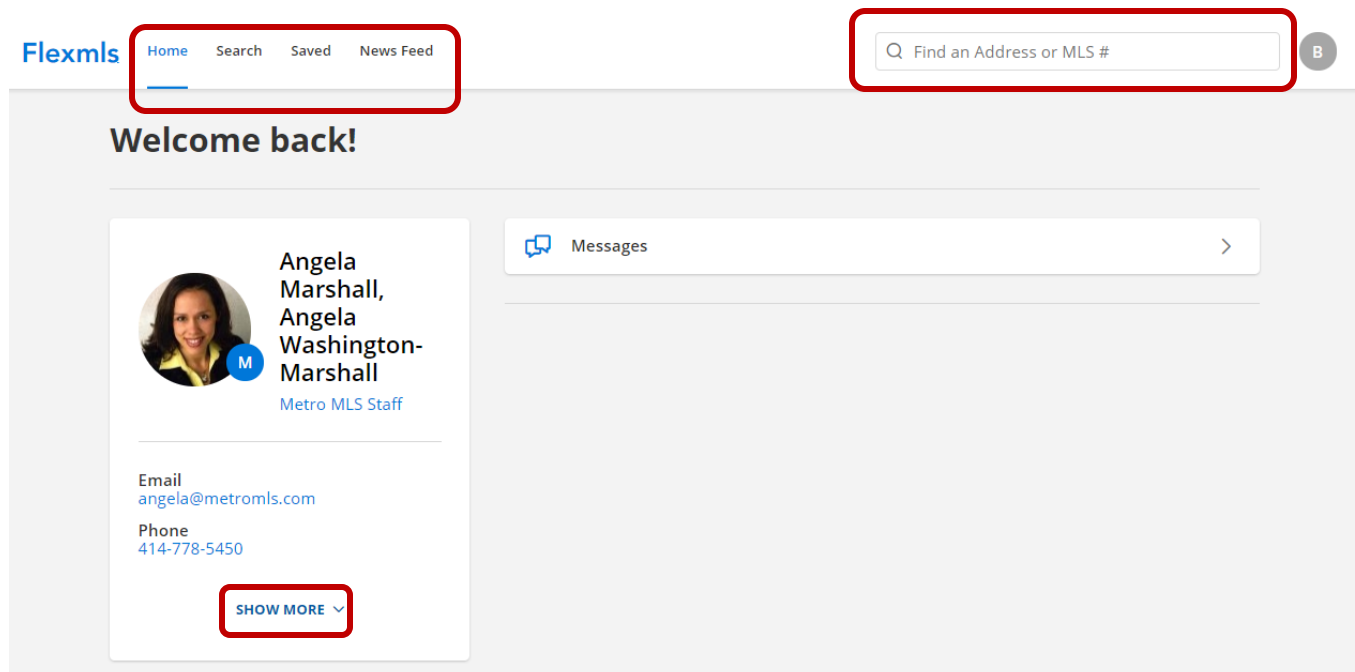
Clicking the **Connect** button will route your Contact to a screen to sign up and log in. They will enter a password of their choice and first and last name.



The image shows a sign-up and log-in interface. On the left, a blue panel contains the text: "Your own portal account allows you to save listings, get updates automatically, and much more." Below this is a profile picture of Angela Washington-Marshall, with the text "Brought to you by Angela Washington-Marshall, MLS Tech Support Analyst Metro MLS Staff". On the right, there are two buttons: "SIGN UP" and "LOG IN". Below these is a message: "Please sign up to get access to this feature. Already have an account? [Log In](#)". The sign-up form includes fields for email (slecrabame@throwam.com), password (masked with four dots), confirm password (masked with four dots), role (New or Buyer), phone, address, city, region, and postal code. There are "Show" links next to the password fields. At the bottom, there is a "SIGN UP" button, a "MAYBE LATER" button, and a note "* Required".

NOTE: Fields marked with an asterick (*) are required.

Once they log in, it will open to their Portal **Home** screen. Here, your contact can access the Portal navigation menu, their messages between the two of you, quickly search and address or MLS #, and click **Show More** to view your profile information.



The image shows the Portal Home screen. At the top left is the "Flexmls" logo. To its right is a navigation menu with "Home", "Search", "Saved", and "News Feed". Further right is a search bar with the placeholder text "Find an Address or MLS #" and a magnifying glass icon. Below the navigation menu is a "Welcome back!" message. On the left side, there is a profile card for Angela Marshall, Angela Washington-Marshall, Metro MLS Staff. The card includes a profile picture, a blue circle with the letter "M", and contact information: Email (angela@metromls.com) and Phone (414-778-5450). At the bottom of the card is a "SHOW MORE" button with a dropdown arrow. On the right side, there is a "Messages" section with a speech bubble icon and a right arrow.

The **Change Settings** link on the Contact's Portal tab allows you edit settings for the way **that** particular Contact views their Portal, such as what listing statuses are allowed to be shown in the Contact's News Feed and to what their Subscription links will opens to (if a Subscription is active on that Contact). Once you have made your selections, click **Save Settings**.

Angela

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

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

[View News Feed](#)

Portal Listing Collections

- [Saved](#)
- [Recommended](#)
- [Hidden](#)
- [Hidden by Agent](#)

Portal Activity
Last Active

Portal Saved Searches

Most Recent Unsaved Search
[Most Recent Unsaved Search](#)

Portal Account
Username: awmmim@gmail.com
[Reset Account](#)
[Change Settings...](#)

Portal Settings

Exclude these listing statuses from appearing in the news feed unless the status is included in the search:

- ☒ Active
- ☒ Pending
- ☐ Closed
- ☒ Expired
- ☐ Coming Soon

Listing links from email show:

- ☒ Agent Default (Show News Feed)
- ☐ News Feed
- ☐ Emailed Listings
- ☐ Saved Search

Preview mode subscriptions are unaffected by this setting and will always link to the news feed.

[Save Settings](#) [Cancel](#)

[TRANSFER](#) [CLOSE](#)

For an agent to mark listings as 'Recommended' and '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.

Angela

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

Searches

53207
Milwaukee Communities
Tosa SF
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 06/10/2018 08:59 AM](#)
- [Reset time and view new since 06/10/2018 08:59 AM](#)

Subscriptions [Add a Subscription](#)

Search Parameters
Property type Single-Family; Status of 'Active'; Zip Code like 53207; and not Contingent of 'With Offer'; New results include new listings, price changes, and status changes.
Created September 12, 2016, Updated June 06, 2018

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

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.

[Return to Contact Management](#)

Angela Washington-Marshall,
MLS Tech Support Analyst,
EcoBroker, e-PRO, GREEN
Metro MLS Staff

Searches

Buyer Search

Listings

- Hidden by Me
- Saved
- Recommended 1
- Hidden by Agent 1

Buyer Search for New Contact Buyer

Save E-Mail Print CMA Export

1

Edit Search List Detail Photos Map Compare Messages

Results: 108 Selected: 0

Sort View [Single Family Plus]

	Price	Status	MLS #	Municipality	Price	Municipality	Bedrooms	Bathrooms
 1 \$13,200 2202 N 49th St Milwaukee, WI 53208-1105 Active / 1448881				Milwaukee	13,200	Milwaukee	5	1
 2 \$69,000 2183 N 47th St Milwaukee, WI 53208-1230 Active / 1445113				Milwaukee	69,000	Milwaukee	4	2

Recommended

Hidden by Agent


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 tab archives all message communications between you and that Contact, along with date and time stamp of message sent. Here, you can 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.

Barkley

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

 **Contact Messages:**

☐ Send a message to me when Angela logs into the portal

[Expand all messages](#) [Collapse all messages](#) [Search messages](#)

[Write a message to Gnarls E Barkley](#)

Displaying messages 1 through 50 of 76 << Prev 1 2 Next >>

Note added to 16735 Mary Cliff Ct, Brookfield, WI 53005 (MLS# 1580656)	From: Gnarls E Barkley	05/10/2018
[1570807] Contact request, 9035 N Spruce Rd., River Hills, WI 53217-1523	From: Gnarls E Barkley	03/13/2018
[1517397] Contact request, 16895 Vanderbilt ST, Brookfield, WI 53005-2777	From: Gnarls E Barkley	02/14/2018
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

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

Send Message

Send message to

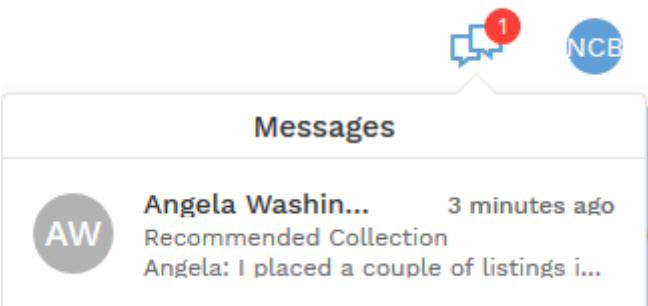
To: Gnarls E Barkley

Subject Recommended Collection

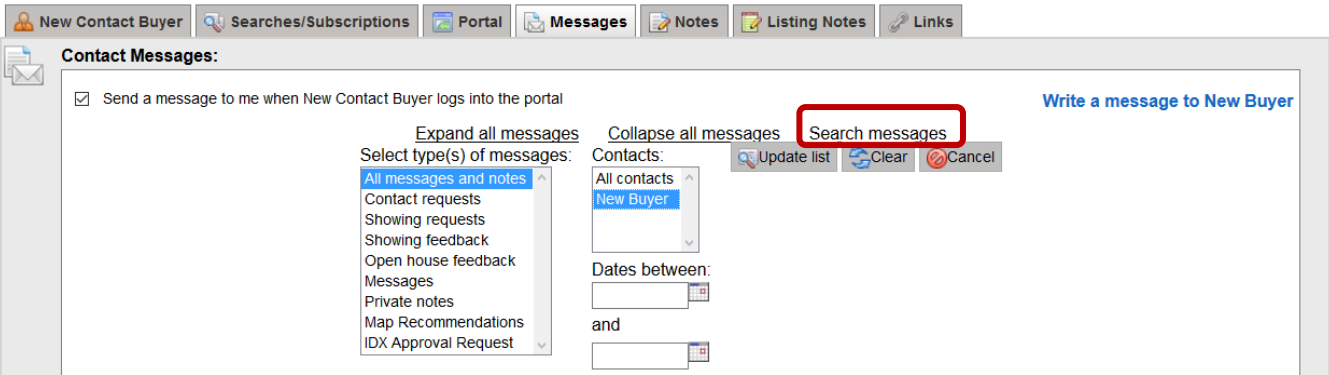
Message
I placed a few listings in this collection for your review - let me know what you think.

[Cancel](#) [Send Message](#)

In the Contact’s Portal, new messages will be indicated with a red circle at the upper right corner of the Portal 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.






Links link

The Links tab 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.

Barkley

[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	0		06/21/2018 at 12:07 PM 

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