

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.

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 big blue button users can click to ‘test drive’ the new portal without committing to it.

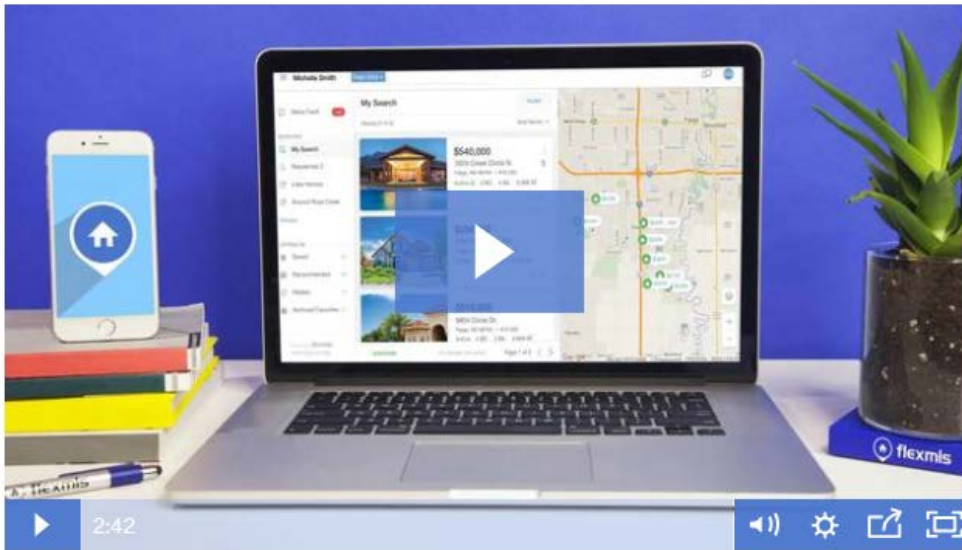
Intro



Click the – to close section

A new way to collaborate

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



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

awmmetromls

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 email greeting

A !!!

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

TOOLS ▾

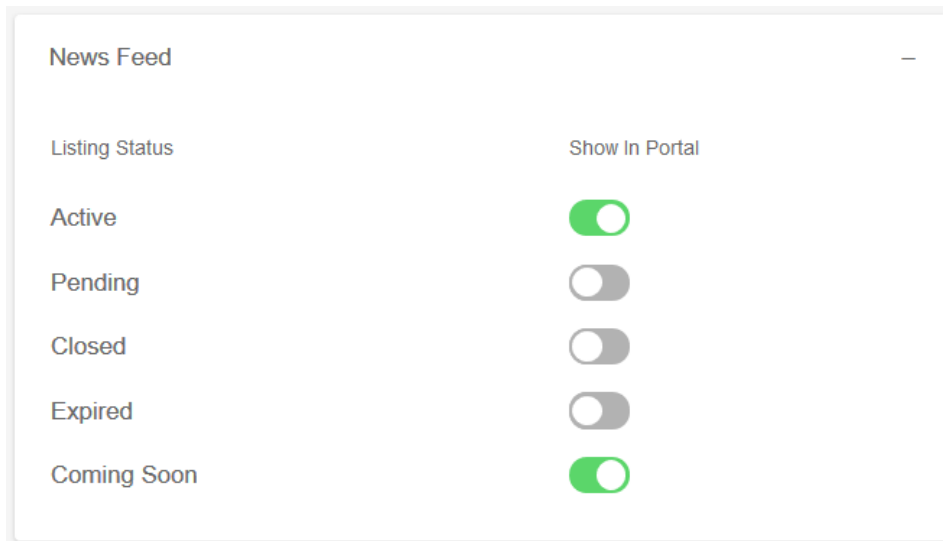
B *I* U **A** ▾ **A** ▾ BOOK AN... ▾ 14PT ▾

☰ ☰ ☰ ☰ MY PHOTOS LIST PHOTOS

I've set up a customized website called a Portal for you. Using this site, you can keep track of listings, send me messages, and keep track of listings you like and dislike. Follow the link below and enter your login information to begin using your Portal. Once you are on the website, be sure to save the address as a Favorite so you can easily visit again. In the lower right panel of the Home Screen, you will be able to change your password to whatever you like.

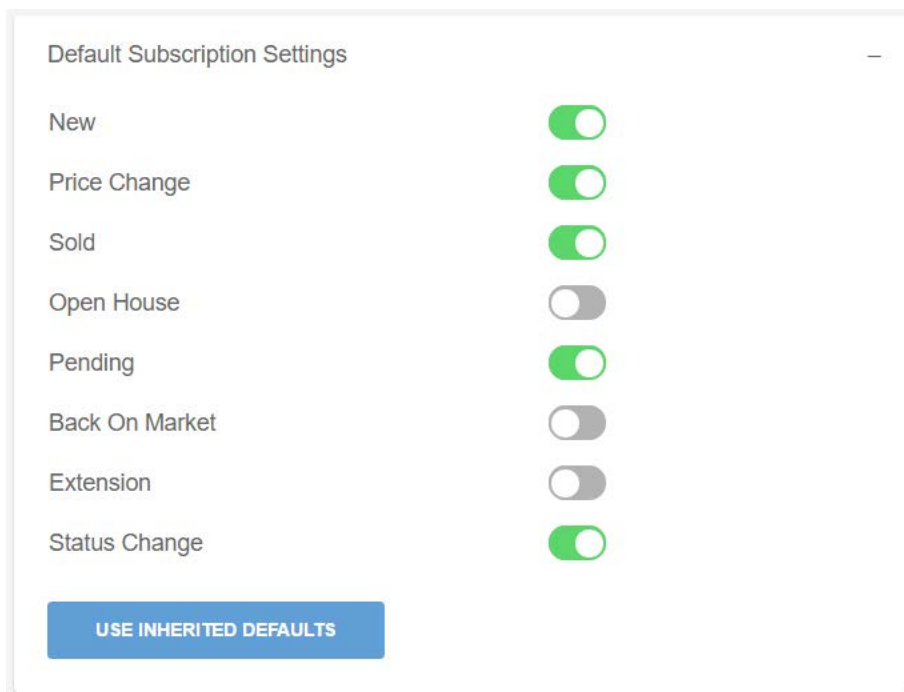
span

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.



Listing Status	Show In Portal
Active	<input checked="" type="checkbox"/>
Pending	<input type="checkbox"/>
Closed	<input type="checkbox"/>
Expired	<input type="checkbox"/>
Coming Soon	<input checked="" type="checkbox"/>

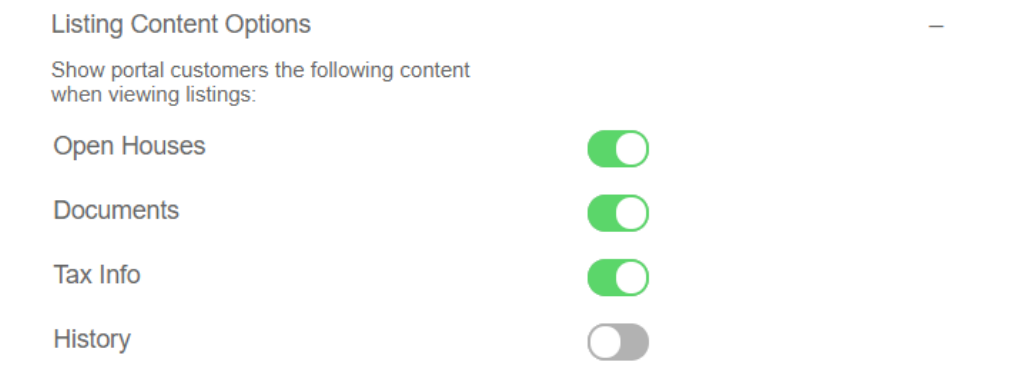
Default Subscription Settings – allows the Contact to subscribe to searches by simply clicking a single "Subscribe" button. This one-click option is made possible by the Default Subscription Settings, which allows the agent to control what events trigger a new listing update for the search.



New	<input checked="" type="checkbox"/>
Price Change	<input checked="" type="checkbox"/>
Sold	<input checked="" type="checkbox"/>
Open House	<input type="checkbox"/>
Pending	<input checked="" type="checkbox"/>
Back On Market	<input type="checkbox"/>
Extension	<input type="checkbox"/>
Status Change	<input checked="" type="checkbox"/>

[USE INHERITED DEFAULTS](#)

Listing Content Options – allows the agent to control what content shows to their Portal customers. These options are similar to 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.



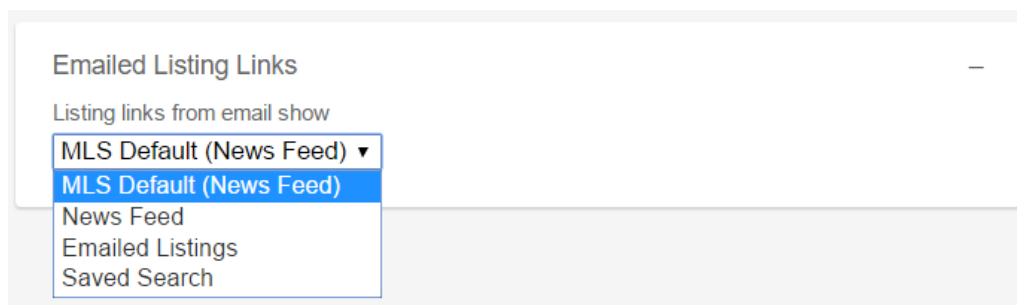
Listing Content Options

Show portal customers the following content when viewing listings:

Open Houses	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>
Tax Info	<input checked="" type="checkbox"/>
History	<input type="checkbox"/>

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.

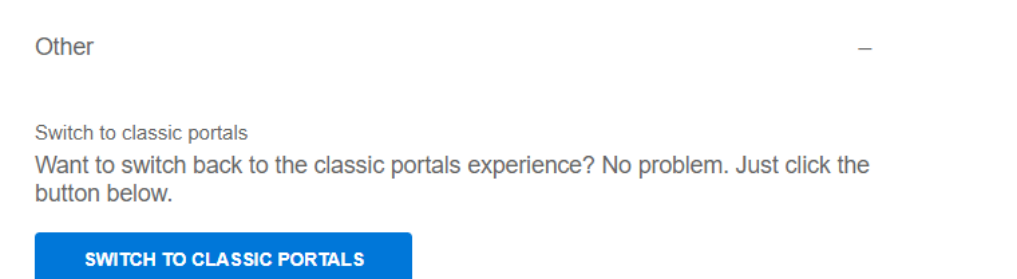


Emailed Listing Links

Listing links from email show

- MLS Default (News Feed) ▾
- MLS Default (News Feed)
- News Feed
- Emailed Listings
- Saved Search

Other – this setting allows you to revert back to the ‘classic’ Portal.



Other

Switch to classic portals

Want to switch back to the classic portals experience? No problem. Just click the button below.

[SWITCH TO CLASSIC PORTALS](#)