Fusion MLS User Guide

CoreLogic®
MarketLinx® Fusion MLS™

All screen captures are representations only. The actual screen design may vary depending on the specific configuration of the CoreLogic software.

Unless otherwise noted, all names of companies, products, street addresses, and persons contained herein are fictitious and are designed solely to illustrate the use of CoreLogic products.

Updated February 2011.

Contents

Fusion MLS Basics

Welcome to Fusion MLS

Welcome to Fusion MLS, CoreLogic's new MLS interface.

Developed using the open-source Adobe Flex framework, Fusion MLS is an expressive Web application that runs on all major browsers, desktops and operating systems, including Mac OS X, Safari, Chrome, and Firefox.

Combined with our new, performance-enhanced .NET middle tier, this system provides a fun and easy user experience that emphasizes client collaboration and customizability. This release includes core MLS functions such as office search, member search, CMA, prospecting (through the contact and search managers), and contact websites.

System Requirements

To ensure maximum optimal Fusion MLS performance, your system should meet or exceed the requirements below.

Supported Operating Systems and Browsers

Windows XP	Internet Explorer 7.0 or later, Firefox 3.x, Safari 3.x, Chrome 2.0 or later
Windows Vista	Internet Explorer 7.0 or later, Firefox 3.x, Safari 3.x, Chrome 2.0 or later
Windows 7	Internet Explorer 8.0 or later, Firefox 3.0 or later
Mac OS X v10.4 - 10.5	Firefox 2.x, Firefox 3.x, Safari 3.x
Mac OS X v10.6	Firefox 3.0 or later, Safari 4.0 or later

Other System Requirements

- Adobe Flash Player 10.2 or later. Free download of Flash Player is available at www.adobe.com.

NOTE: Flash Player does not currently run in 64-bit browsers. If you are using a 64-bit operating system you must launch Fusion MLS in a 32-bit browser. More information regarding Flash Player on 64- bit operating systems can be found at:

Flash Player on 64-bit operating systems.

- Broadband internet connection (high-speed cable, wireless, or DSL)
- Screen resolution: 1024w x 768h or higher recommended. 1024w x 600h (common netbook size) is suitable in Full Screen mode

- Memory: 2GB RAM for Vista, Windows 7, and Mac OS X. 1 GB RAM for Windows XP

Important Notes

- You must add your MLS to your firewall and/or pop-up blocker's list of trusted sites
- You must adjust pop-up blocker permissions to permit access to external third-party sites (e.g., Realist, Document Manager).
- You should set your Flash players Local Storage setting to 100k (the default) or higher.
- Third-party and add-on products that work with Fusion MLS MLS may have different requirements.
- Fusion MLS MLS does not support Beta operating systems or browsers.
- When a software manufacturer discontinues "mainstream support" for a particular browser or operating system version, CoreLogic will also discontinue support.

Logging On and Off

▶ To log on to Fusion MLS:

1. Type your user name in the **User ID** box.
2. Type your password in the **Password** box.
3. Click the **Sign In** button.

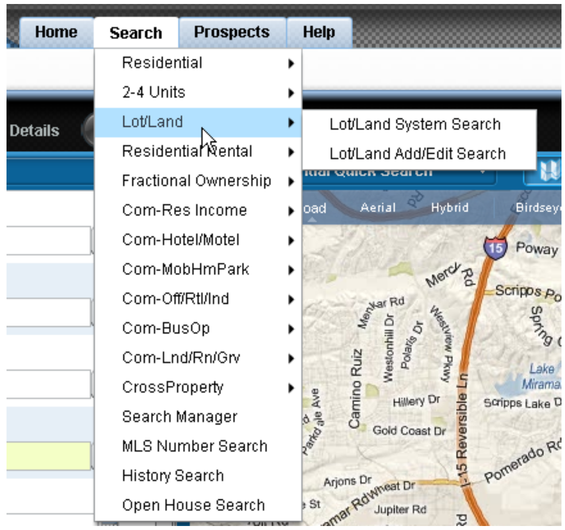
▶ To log off from Fusion MLS:

Click the **Sign Out** link at the top of the page.

Getting Around in Fusion MLS

The navigation tabs at the top of the page enable you to move from section to section within Fusion MLS.

Some navigation tabs have menus that enable you to get to a specific page within a section. Move your cursor over a tab to see its menu items.



Menu items with a triangle after them have submenus. Move your cursor over these items to see their submenus.

Click a tab, menu item or subitem to go directly to a specific page within Fusion MLS.

My Folder

The My Folder feature enables you to bookmark listings for future reference. You can access your folder at any time by clicking the My Folder [

] button at the top of the screen. The number in parentheses indicates how many items are currently saved in your folder. You can only open your folder if there are items in it.

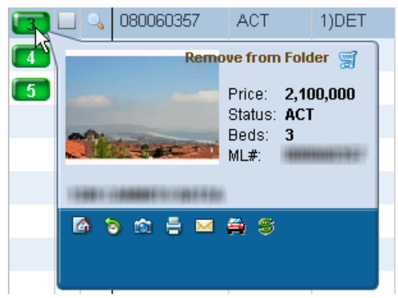
▶ To add a listing to your folder:

1. Move your cursor over
   - A listing "pin" on a search or search results map
   - An ID label in a search results grid or gallery

2. Click the **Add to Folder** link on the Mini-report that appears.

▶ To remove listings from your folder:

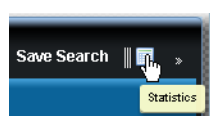
1. Click the My Folder button to open your folder.
2. Move your cursor over the ID label to open the Mini-report.



3. Click the **Remove from Folder** link.

Tooltips

Most buttons and icons in Fusion MLS are clearly labeled. There are instances, however, when limited space prevents the inclusion of descriptive labels. In such cases, move your cursor over a button or icon to see a *tooltip*: a pop-up label that describes the button or icon's function.



Calendar Controls

Calendar controls enable you to enter dates.

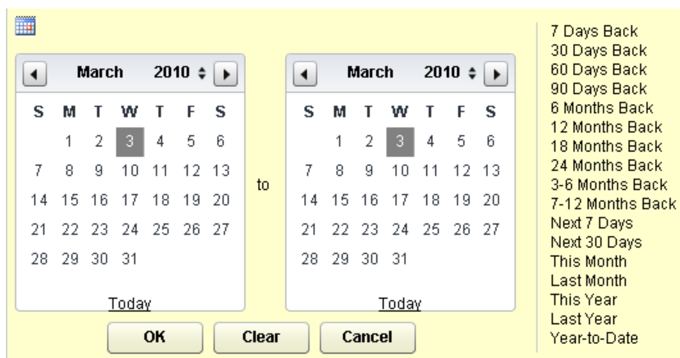
▶ To enter a single date:

1. Click the calendar icon [ ] to open the calendar control.

2. If necessary, use the next [ ] and previous [ ] buttons to set the month.
3. Click a number on the calendar to set the date.

▶ To enter a date range:

1. Click the calendar icon [ ] to open the calendar control. The calendar on the left is used to set the beginning date in the range; the one on the right is for the end date.



2. Set the date range:
   - If desired, you can select a predefined date range (e.g., 7 days back, 30 days back, year to date) by clicking one of the options on the right-hand side of the control.
   - To set the date range manually:

   2.1. If necessary, click the year up/down button [ ] to set the year.

   2.2. If necessary, use the next [ ] and previous [ ] buttons to set the month.

   2.3. Click a number on the calendar to set the date.

   2.4. Click **OK**.

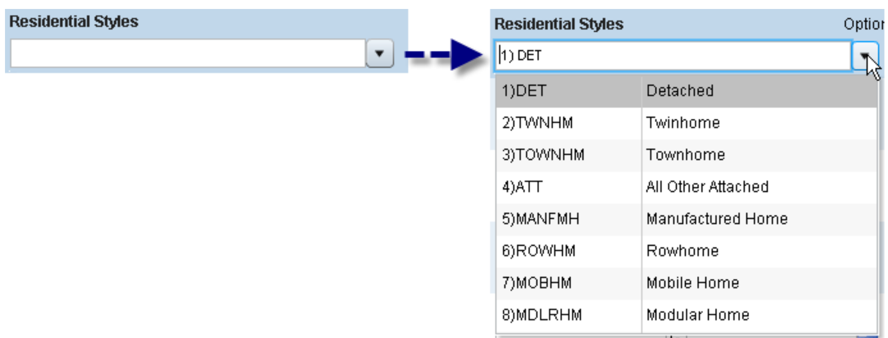
Clearing Input Fields

▶ To clear an input field:

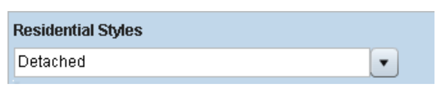
Click the clear button [].

Lists (Listboxes)

Listboxes (often referred to as "lists" in this guide) are text boxes with expandable lists attached, which enable you to select input options. Your selections then appear in the text box.



In many cases, you can choose to see your input as full descriptions:



or shorter codes:

If you have many selections, it is sometimes easier to see them all in the list-box as codes rather than descriptions.

You can type directly into a listbox, and Fusion MLS will automatically complete your input with the first available option that begins with the letters you have typed. In the example below, the user typed "de," and Fusion MLS inserted the option "Detached."

If you type a value that is not a valid option, Fusion MLS will not accept the input.

▶ To expand and collapse a list

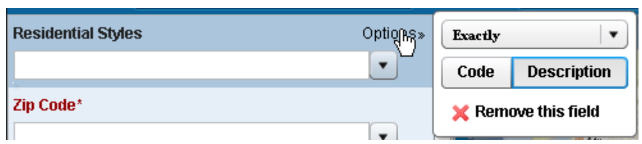
Click the expand/collapse button [▾]

▶ To select and deselect listbox items:

- Click an item to select it. Selected items are highlighted.
- Click a highlighted item to deselect it.
- You can select a continuous range of items by clicking the first item in the range, holding down the SHIFT key, and then clicking the last item in the range.

▶ To switch between code and description input:

1. Move your cursor over the field so that the **Options** link becomes visible.
2. Click the **Options** link to open the options panel.
3. Click the **Code** or **Description** button.

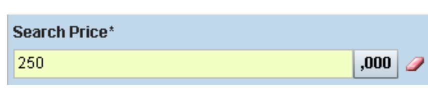


Price in Thousands Button

The price in thousands feature provides a quick way to enter prices. When the feature is enabled, the thousands button [,000] is visible, and you do not have to type the last three zeros of a price greater than 1,000.

Both of the following examples result in a search price of $250,000:

With the price in thousands feature:



Without the price in thousands feature:

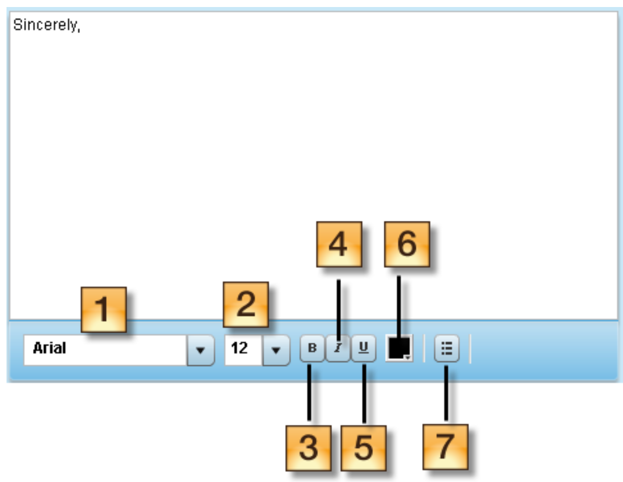
▶ To turn the price in thousands feature on and off for an input field:

To disable the feature, click the thousands button [,000] next to the input field. The button will change to show that the feature is disabled [«].

To reenable the feature, click the enable button [«] next to the input field. The button will change to show that the feature is enabled [,000].

The Text Editor

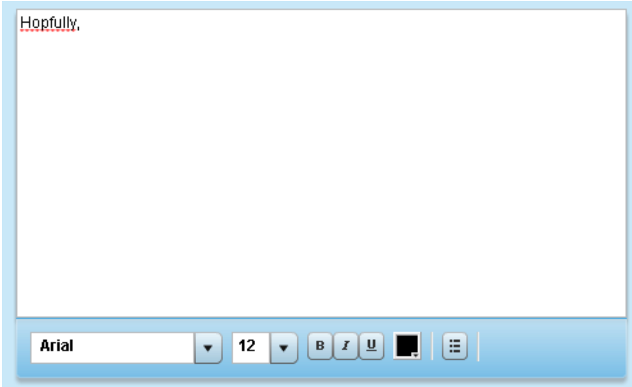
The text editor enables you to type and format text.



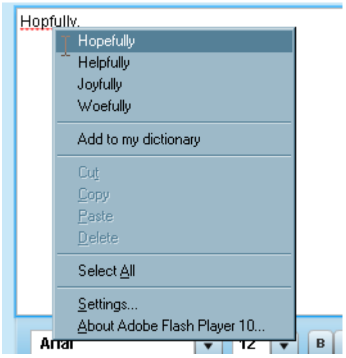
1. Font family list: select a font from this listbox.
2. Font size list: select a font size from this listbox.
3. Bold button: click to make text bold.
4. Italics button: click to italicize text.
5. Underline button: click to underline text.
6. Color selector: click to open the color palette and change text color.
7. Bullets button: click to create bullet points.

Spell Check

The text editor has a spell check feature. As you type, possible misspellings are underlined in red.



Right-click the misspelled word to see suggested corrections.



Select a suggestion to insert it in place of the misspelled word. If you decide that the word is, in fact, spelled correctly, and you do not want Fusion MLS to flag further instances of the word, select **Add to my dictionary**.

Selecting Text to Format

If you only want to change the formatting for part of your text (such as a single word or sentence), first select the part you want to change.

▶ To select text:

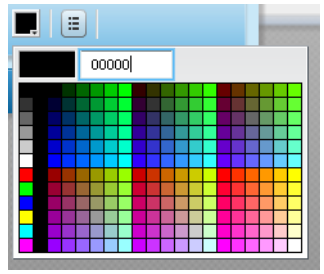
1. Place your cursor at the point where you want the selection to begin.
2. Hold down the left mouse button and drag the cursor to the point where you want the selection to end
3. Release the mouse button.

The selection should be highlighted. You can now format the selected text.

Changing Text Color

▶ To change text color:

1. Click the color selector button [] to open the color palette.



2. Select a color:
   - Click a color on the palette to apply the color.
   - If you know HTML color codes, you can type a code in the text box to change the color (the "#" is not necessary).

Mini-Reports

The mini-report displays summary information about a listing.

Icons at the bottom enable you to perform various actions. Move your cursor over an icon to see a descriptive tooltip.

To open a mini-report, move your mouse over a "pin" on the map, or an ID label in a search results grid or gallery.

Grid Column Auto-Fit

The auto-fit feature enables you to adjust the with of a single grid column, or all the columns in a grid, to accommodate headers and data without cutting off text.

▶ To autofit a single grid column:

1. Move your cursor over the right-hand border of the header for the column you want to autofit.
2. When the cursor changes to two outward-facing arrows, double-click to autofit the column.

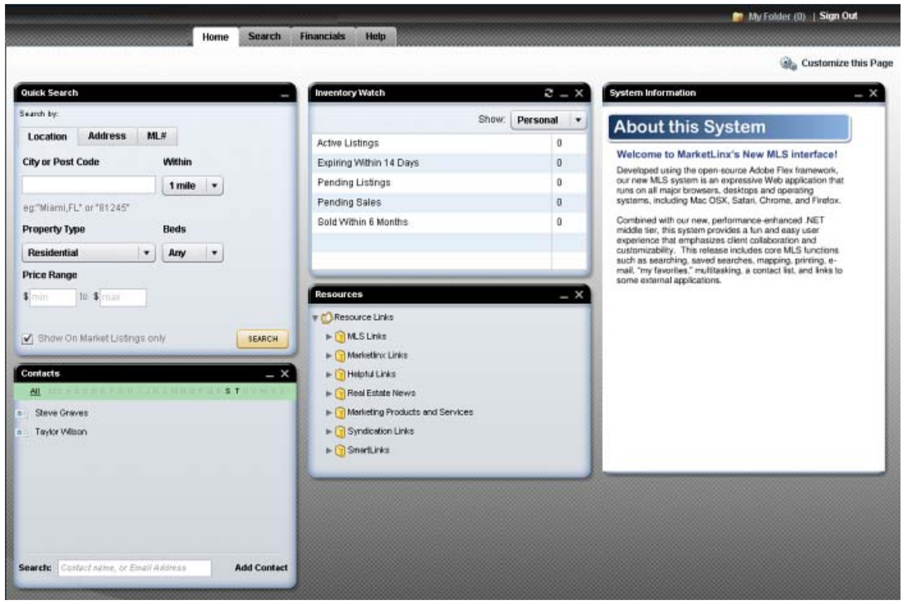
▶ To autofit all grid columns at once:

1. Right-click the header row to open a context menu.
2. Select **Autofit all columns**.

The Home Tab

The Home Tab

The Home tab displays your gadgets, which provide quick access to various Fusion MLS functions. You can specify which gadgets appear on the Home tab, and rearrange them to suit the way you work.

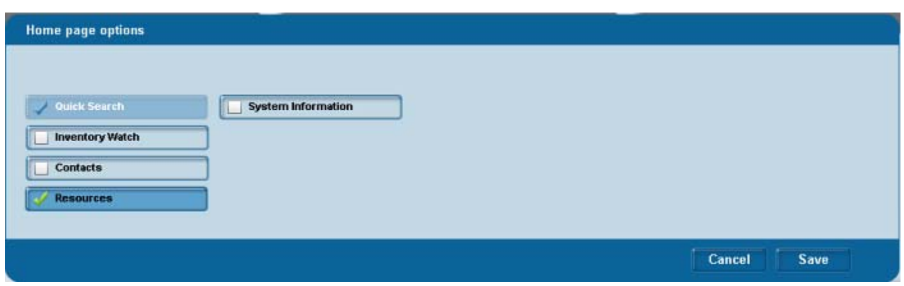


Gadgets

Gadgets are Home tab panels that provide quick access to useful information and Fusion MLS functions.

▶ To customize the gadgets on the Home tab:

1. Click the **Options** button to open the Home Page Options screen.



2. Click options to select or deselect them. Selected options are marked with a check [], and will appear on your Home

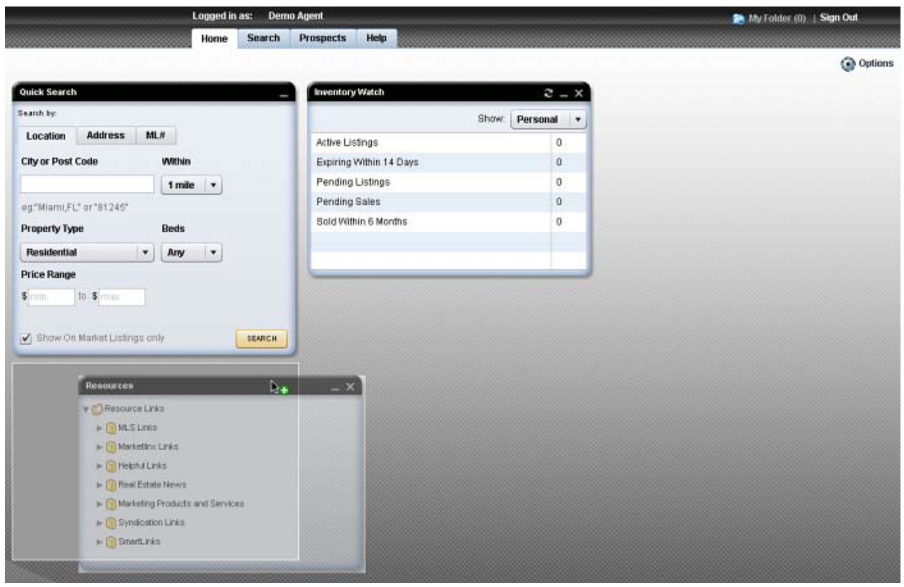
tab. Deselected options are marked with an empty check box [

], and will not appear on your home tab.

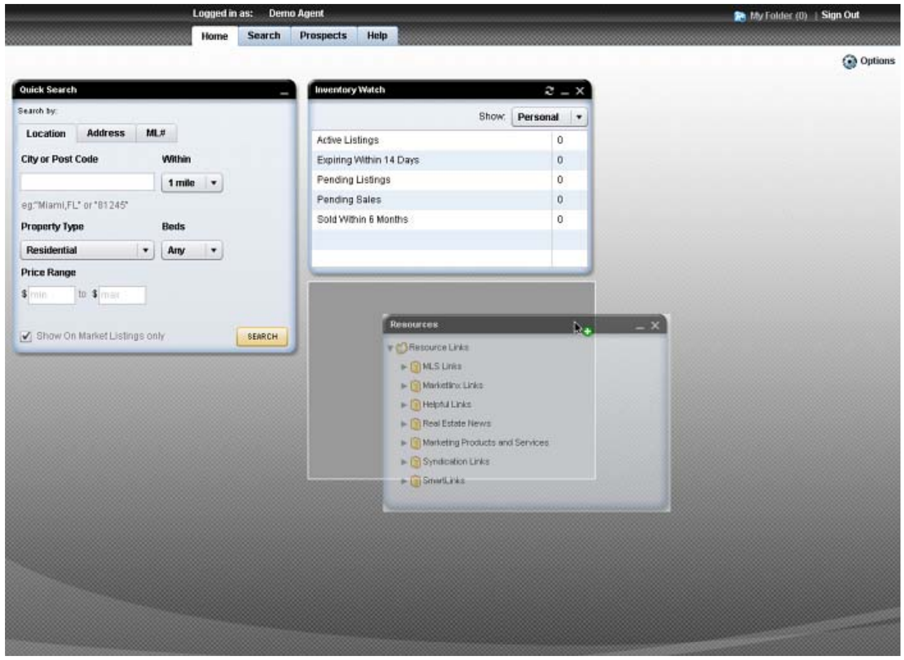
3. Click **Save**.

▶ To rearrange the gadgets on the Home tab:

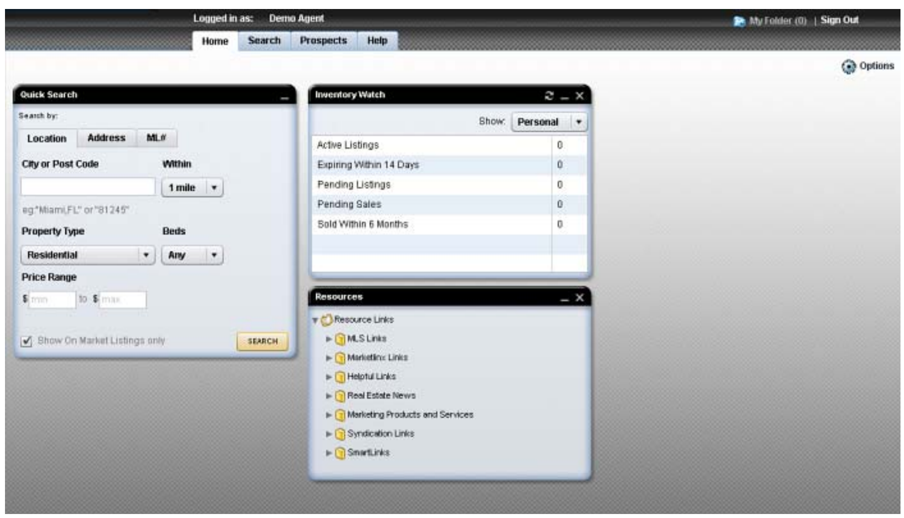
1. Use the mouse to move your cursor over the title of the gadget you want to move.
2. Hold down the left mouse button.
3. Move the mouse to start dragging the gadget, which will become semi-transparent.



4. Drag the gadget to the general area where you want to place it. As you move the gadget, available spaces will appear as outlined rectangles.



5. Release the left mouse button to drop the panel in its new position.



▶ To close a gadget:

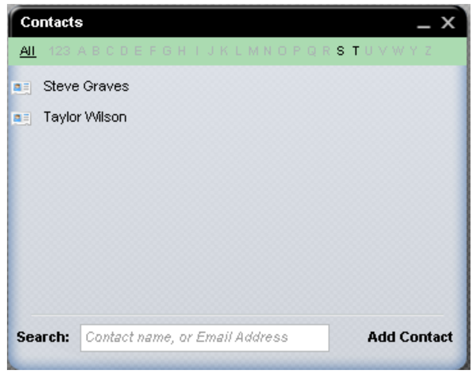
Click the close button [✕] in the gadget's title bar.

▶ To minimize a gadget:

Click the minimize button [_] in the gadget's title bar.

The Contacts Gadget

The Contacts gadget enables you to manage your contact list from the Home tab.

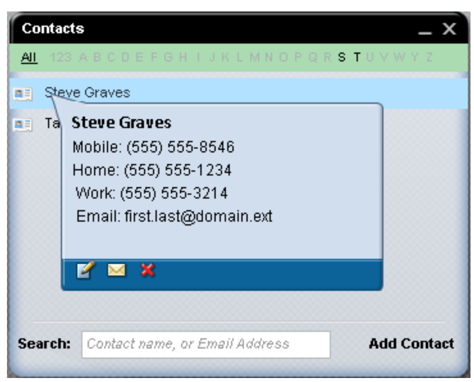


▶ To add a contact from the Contacts gadget:

1. Click **Add Contact** to open the new contact form.
2. Enter the new contact's information in the new contact form. Red labels indicate required fields.
   - The **Other Phone 1** and **Other Phone 2** fields are customizable: you can delete the label text and type your own field name.
3. Click the **Save** button.

▶ To delete a contact from the Contacts gadget:

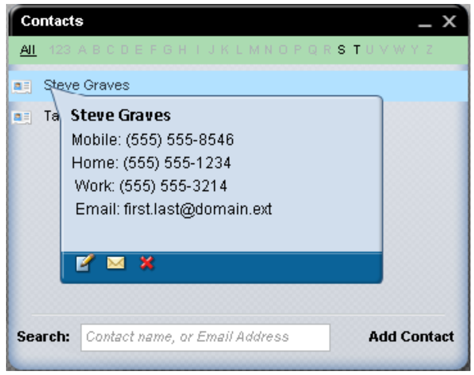
1. Move your cursor over a contact's information icon to open the summary information popup.



2. Click the delete contact button [].
3. When prompted to confirm the deletion, click **OK**.

▶ To edit contact information from the Contacts gadget:

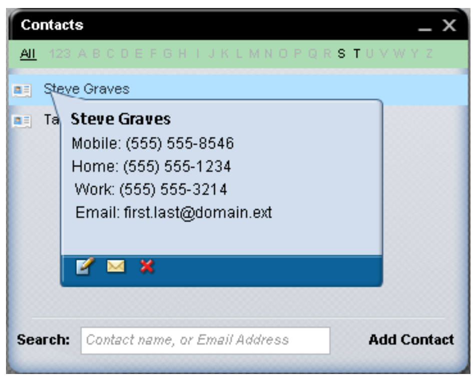
1. Move your cursor over a contact's information icon to open the summary information popup.Then click the edit icon [ ].



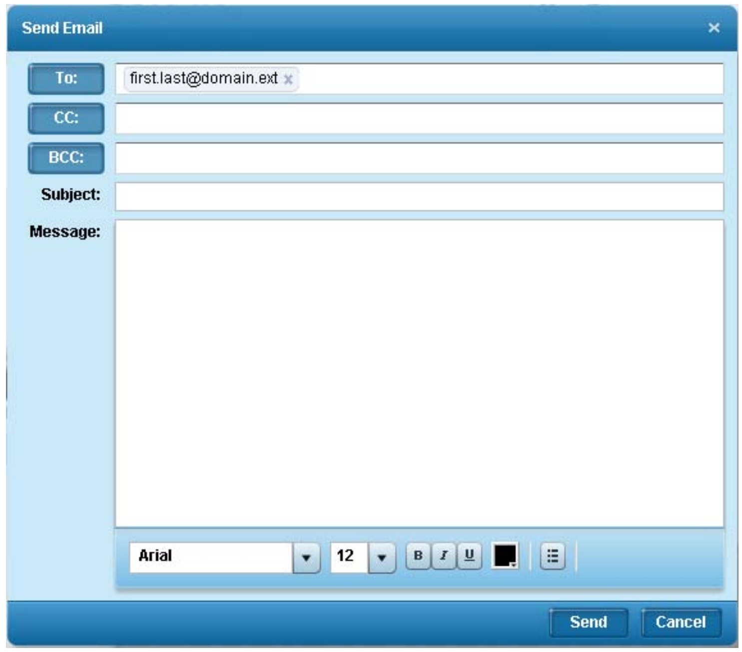
2. Make any desired changes.
3. Click the **Update Changes** button.

▶ To e-mail a contact from the Contacts gadget:

1. Move your cursor over a contact's information icon to open the summary information popup.



2. Click the e-mail icon [] to open the e-mail form.

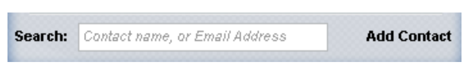


3. Compose the message and click **Send**.

▶ To locate a specific contact with the Contacts gadget:

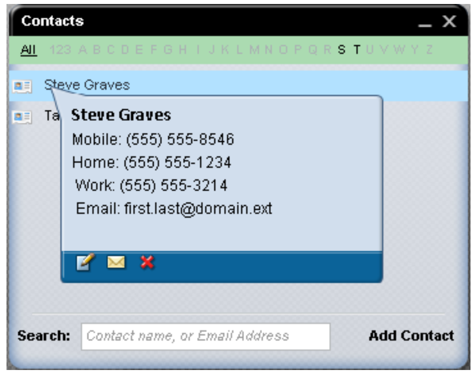
• Click a letter or **123** in the Contacts gadget's index row: The gadget will display all contacts whose first name begins with that letter.

• Type a contact's name or e-mail address in the **Search** box. As you type, the gadget will narrow the contact list to match your criteria.



▶ To view summary information for a contact:

Move your cursor over a contact's information icon to open the summary information popup.

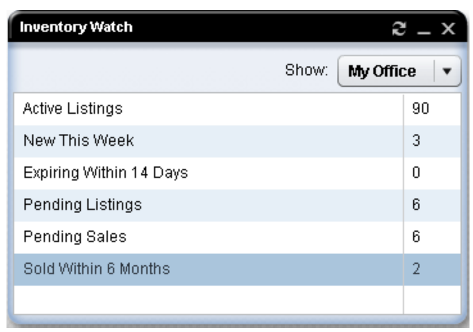


▶ To view a contact's entry in the Contact Manager:

Click the contact's name in the Contacts gadget.

The Inventory Watch Gadget

The Inventory Watch gadget displays inventory counts for you, your office, and your firm.



You can change the Inventory watch filter to display inventory counts for you, your office, or your firm.

▶ To change the Inventory Watch filter:

Select an option from the **Show** list.

▶ To refresh the Inventory Watch gadget:

Click the refresh button [ ] in the gadget's title bar.

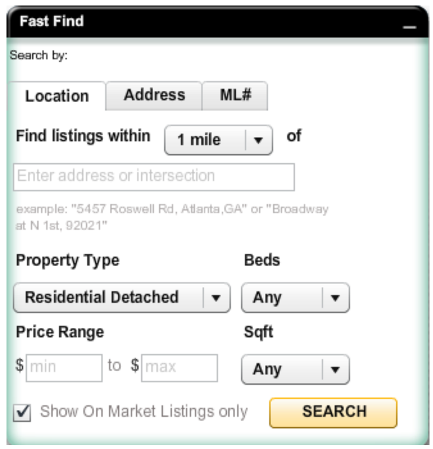
▶ To view your inventory:

Double-click one of rows in the Inventory Watch gadget to see the listings displayed in a search results screen.

The Fast Find Gadget

The Fast Find gadget enables you to perform searches from the Home tab. You can search by

- Location (city/postal code/address/intersection)
- Address
- MLS number



▶ To perform an address search from the Fast Find gadget:

1. Click the Quick Search gadget's **Address** tab.
2. If desired, type a street number in the **Street#** box.
3. Type a street name in the **Street Name** box. This is a required criterion. Do not include the street type (e.g., "Street," "Avenue") in the street name.
4. If desired, type a unit number in the **Unit#** box.
5. If you want to limit your search to on-market listings, select the **Show On Market Listings** only check box.
6. Click the **Search** button.

▶ To perform a city/postal code/address/intersection search from the Fast Find gadget:

1. Click the Quick Search gadget's **Location** tab.
2. Type a city name or postal code, address, or intersection in the location box. This criterion is required.
   - If you enter an address, it must be a full address (street number, street name, city, and zip/postal code).
3. Select a search radius from the **Find listings within** list.
   - The search is conducted from the center of the area defined in the location box.

4. Specify the other criteria you want to use for the search.
5. If you want to limit your search to on-market listings, select the **Show On Market Listings** only check box.
6. Click the **Search** button.

▶ To perform an MLS number search from the Fast Find gadget:

1. Click the Quick Search gadget's **ML#** tab.
2. Type one or more MLS numbers in the box. Separate multiple numbers with commas.
3. Click the **Search** button.

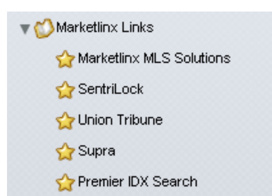
The Resources Gadget

The Resources gadget displays useful links to other web sites.

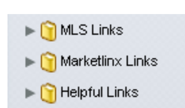
These links are organized in folders.

▶ To expand and collapse resource link folders:

Click the expand button [ ] next to a folder to expand it.



Click the collapse button [] next to a folder to collapse it.



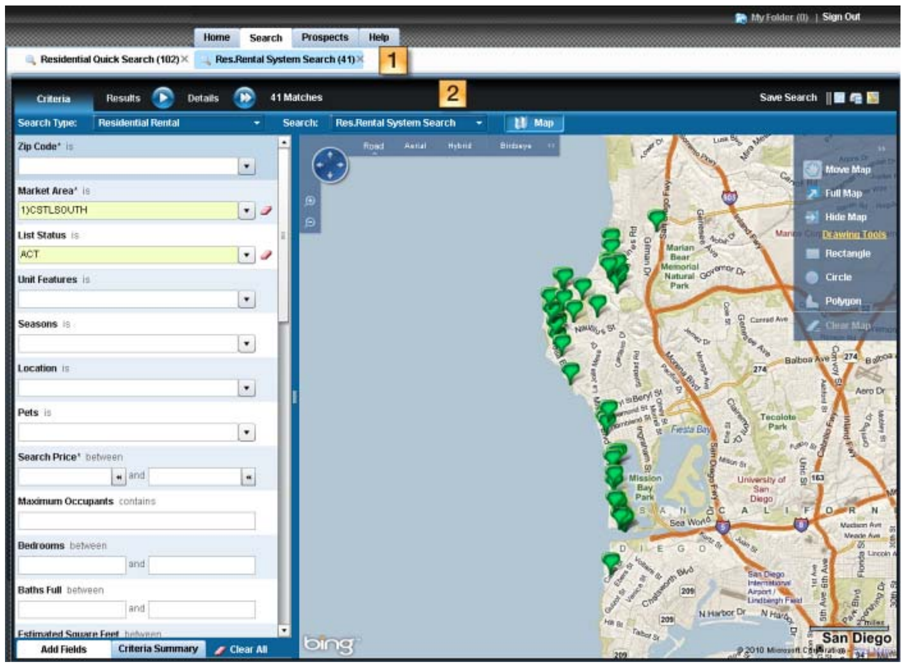
The System Information Gadget

The System Information gadget displays important information from your MLS.

Searches

The Search Tab

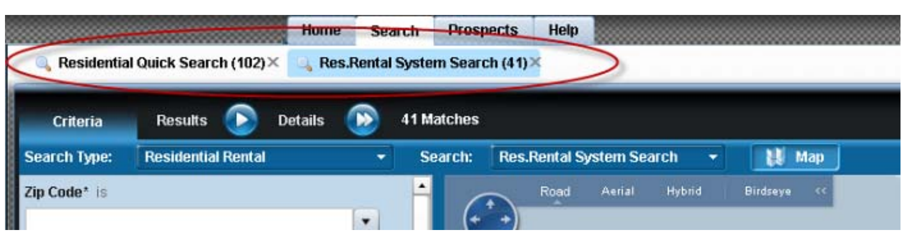
The Search tab contains the criteria, results, and details screens that you will use to conduct searches.



1. **Searches bar**: displays your open searches
2. **Search task bar**: enables you to switch from criteria to results to details screens, displays search matches, and enables you to perform other search-related tasks.

Multiple Searches Feature

You can have multiple searches open simultaneously in Fusion MLS. While working with one search, you can start a new one and have all your searches open and accessible at once. The title of each search and the number of listings it returned appear in the searches bar beneath the **Search** navigation tab.



Your open searches are persistent for as long as your session is active: if you go to another Fusion MLS module, such as the Home Tab, and then come back to the Search module, your open searches will still be available. Your searches will remain open either until you close them, or you log off.

▶ To start a new search:

Click the new search icon [] in the searches bar.

▶ To switch between open searches:

From the searches bar, click the name of the search you want to view.

▶ To close an open search:

Click the **X** next to the search name in the searches bar.

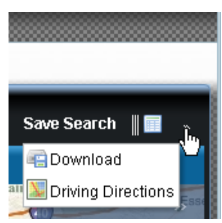
Search Task Bar Icons

Icons in the search task bar enable you to perform such actions as e-mailing, downloading, and getting driving directions. These icons may vary from screen to screen.

Some of these icons may be hidden. A >> button indicates that some of the available icons are not visible.

▶ To access hidden search icons directly:

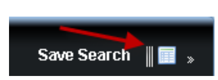
1. Click the >> button to view a list of available functions.



2. Click an icon in the list.

▶ To make hidden search icons visible:

1. Move your cursor over the divider between the first icon and any other controls on the bar.



2. Hold down the left mouse button and drag the divider to the left until all the icons are visible.

Search Criteria

Searching begins on the search criteria page, where you can create and save new searches, as well as load saved custom and system searches.

1. **Results button**: opens the search results page
2. **Details button**: opens the search details page
3. **Results count**: displays the number of listings that match your search criteria
4. **Search menu**: enables you to load a saved custom or system-defined search
5. **Save search button**: enables you to save the current search criteria
6. **Toggle map button**: hides and restores the search map
7. **Search task bar icons**: provide access to statistics and driving directions, and enable you to download search results
8. **Additional fields button**: enables you to add search criteria fields
9. **Criteria summary button**: displays a summary of the current search criteria

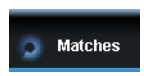
10. **Clear all button**: clears all search criteria
11. **Search map**: displays mapped search results, and enables you to create map searches

Related Topics:

- “Calendar Controls” on page 15
- “Lists (Listboxes)” on page 17
- “Price in Thousands Button” on page 18

Where’s the Search Button?

There is no Search button. Fusion MLS executes a search each time you enter or modify criteria. While the search is running, the results count indicator displays an “in progress” symbol:



Once the count indicator displays the number of listings returned by your search, you can go directly to the results or details screen by clicking the **Results** or **Details** button.

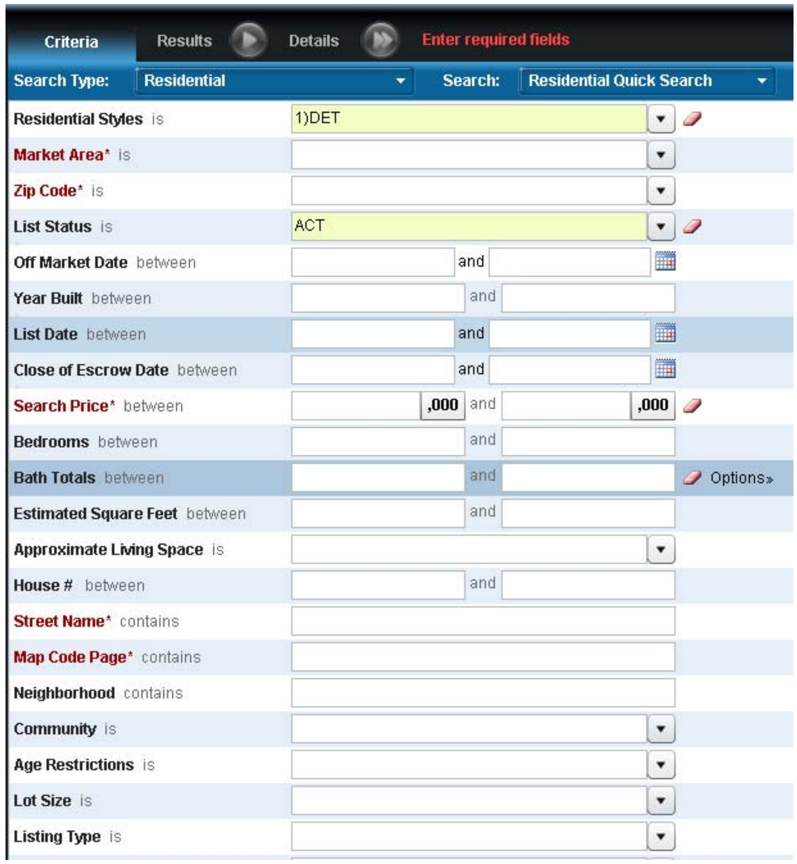
Search Limits

If too many listings match your current criteria, the results count indicator displays an over limit message.

If the number of matches exceeds the search limit, you must adjust your criteria before you can proceed to the search results or details pages.

Required Fields

If there are any required search fields, they appear in red, and the results count indicator displays a message informing you that input is required.



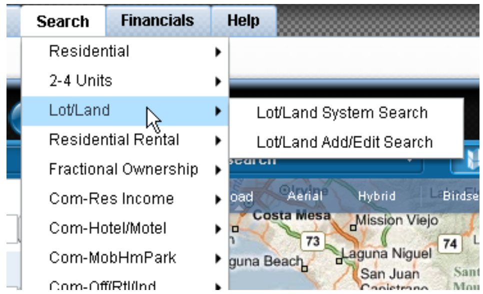
Not ALL of the fields in red are necessarily required. You may find that when you enter criteria for one required field, the others become optional.

Loading a Saved Custom or System Search

▶ To load a saved search (custom or system):

- For the currently selected property type: select a search from the **Search** list.

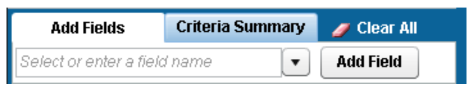
• For any property type: move your cursor over the **Search** navigation tab to open the Search menu, then move your cursor over a property type to open the search submenu. Click a submenu item to load the search.



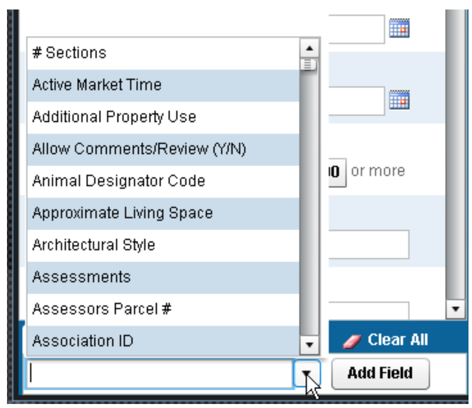
Adding and Removing Fields

▶ To add search fields:

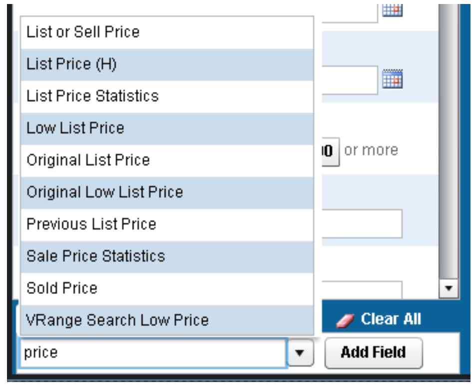
1. Click the **Add Fields** button to open the field selector.



2. Select a field to add to the search criteria page:
   • Click the expand list button [ ] to open the field list, and select a field.



- Start typing in the box to see a list of fields that match your input, and select a field.



3. Click the **Add Field** button.
4. When you are finished adding fields, click the **Add Fields** button to close the field selector.

▶ To remove a field from the search criteria page:

1. Move your cursor over the field so that the **Options** link becomes visible.
2. Click the **Options** link to open the options panel.
3. Click **Remove This Field**. 

Rearranging Fields

▶ To rearrange the fields on the search criteria page:

1. Move your cursor over the field you want to move.
2. Hold down the left mouse button and drag the field to its new location.
3. Release the left mouse button.

Clearing a Field

▶ To clear an input field:

Click the clear button [].

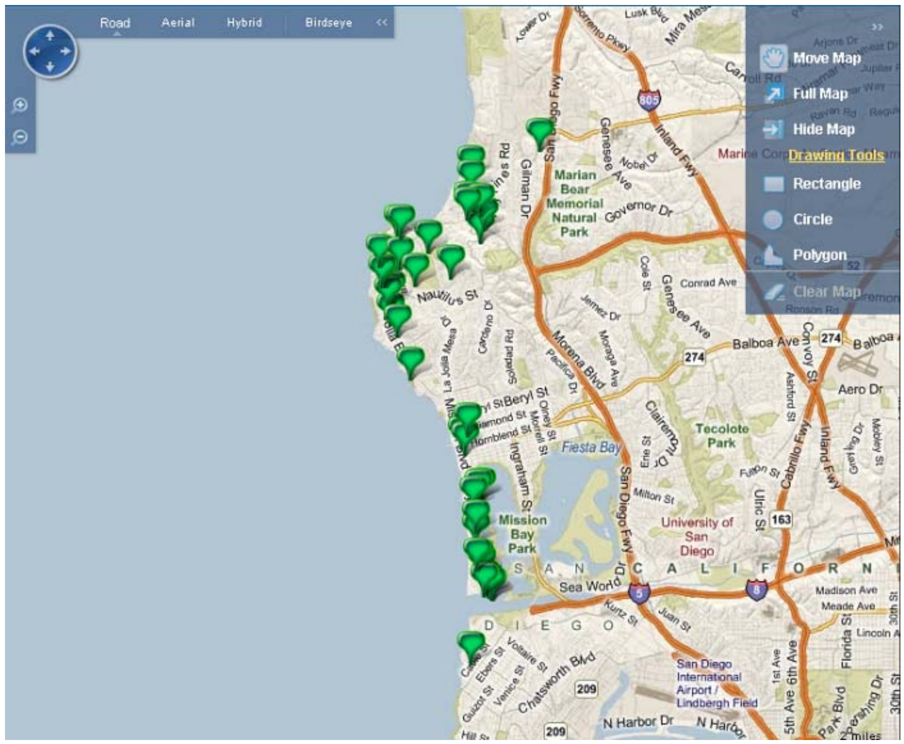
Clearing All Search Criteria

▶ To clear all search criteria:

Click the **Clear All** button [Clear All].

The Search Map

The search map, available from the search criteria screen, enables you to define search areas for map searches. It also displays the location of listings that match your current search criteria. If desired, you can hide the search map.



Related Topics:

- “Fusion MLS Maps” on page 120
- “Map View Control Panel” on page 121
- “Map Tools Panel” on page 121
- “Zooming and Panning the Map” on page 122
- “Map Views” on page 123
- “Map Searches” on page 45

Hiding the Search Map

▶ **To hide the map:**

- From the map tools panel, click the hide map button [] in the map controls panel.
- Click the **Map** button[].

▶ To restore a hidden map:

Click the **Map** button[].

Getting Driving Directions from the Search Map

▶ To get driving directions for a listing directly from the map:

1. Right-click a listing "pin" on the map to open a context menu.

2. Select an option (**Drive to here** or **Drive from here**) to open the driving directions input screen. Depending on the option you select, the listing's address will be in the starting or ending position.
3. Add, remove, or reorder addresses as desired.
4. Select route options.
5. Click **Get directions**.

Related Topics:

- "Driving Directions" on page 126

Search Operators

Operators determine how Fusion MLS uses your search criteria. Common operators include

- is
- is not
- contains
- starts with
- between

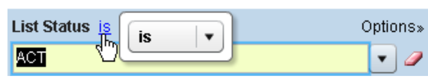
If you have entered criteria for a field, the operator in use appears next to the field name.

For fields that do not yet contain criteria, move your mouse over the field to display the operator.

The options that are available for a criteria field vary, depending on what type of input the field accepts (such as dates, text, or numbers).

▶ To change the criteria operator for an input field:

1. Click the operator to open the available operators list.



2. Click the list's expand button to expand the available options list.

3. Select an option from the list.

Map Searches

With the map search feature, you can draw shapes on a map to define geographical search areas. These search areas can be circular, rectangular, or polygonal. You can have up to 5 shapes on the map at once.

When you use map search, Fusion MLS applies any other search criteria you have entered on the criteria screen.

Related Topics:

• "Fusion MLS Maps" on page 120
• "Map View Control Panel" on page 121
• "Map Tools Panel" on page 121
• "Zooming and Panning the Map" on page 122
• "Map Views" on page 123

Drawing Map Shapes

▶ To draw a circle on the search map:

1. From the map tools panel on the search map, click **Circle**.
2. Place your cursor on the location you want to make the center of the circle. The cursor should look like a crosshair [+].
3. Click the mouse to set the center point.
4. Move the cursor to adjust the circle's radius.
5. Click the mouse to set the circle.

▶ To draw a polygon on the search map:

1. From the map tools panel on the search map, click **Polygon**.
2. Place your cursor on the location you want to make the first point of the polygon. The cursor should look like a crosshair [+].
3. Click the mouse to set the point.
4. Continue setting points until your polygon is defined.
5. To close the polygon, click the first point you set.

▶ To draw a rectangle on the search map:

1. From the map tools panel on the search map, click **Rectangle**.
2. Place your cursor on the location you want to make the first corner of the rectangle. The cursor should look like a crosshair [+].
3. Click the mouse to set the corner.
4. Move your cursor to the location you want to make the opposite corner of the rectangle.
5. Click the mouse to set the corner.

Modifying Map Shapes

When you draw a shape on the search map, you will notice dots, or **nodes**, on each side and on each corner of the shape. You can use these nodes to modify the shape.

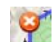
▶ To modify a shape on the search map:

1. Move your cursor over a node.
2. Hold down the left mouse button and drag the node to the desired location.

3. Release the left mouse button.

Removing Map Shapes

▶ **To remove a shape from the search map:**

Click the shape's clear button [].

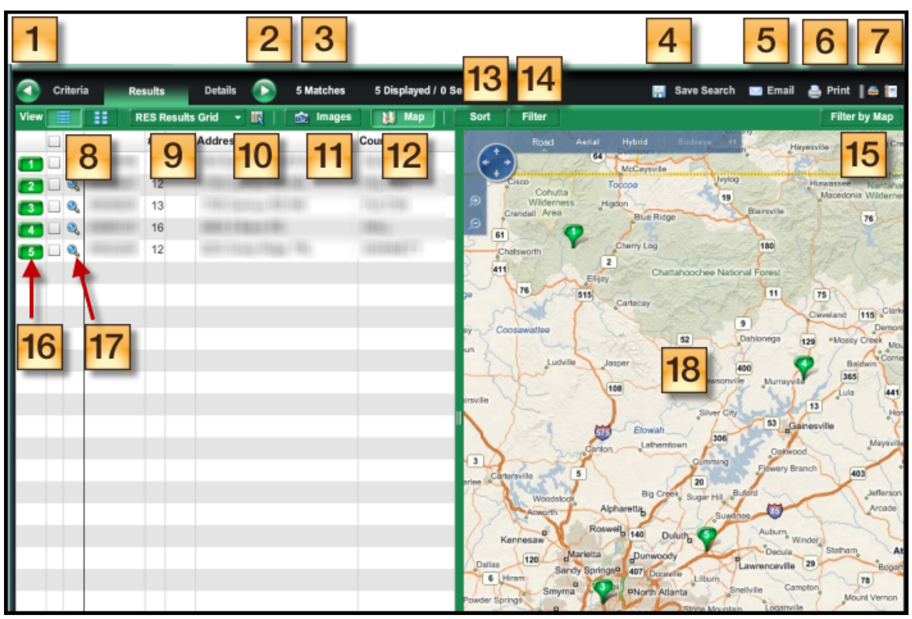
▶ **To remove all shapes from the search map:**

From the map tools panel, click **Clear Map**.

Search Results

The search results screen displays records returned by a search. You can view results in a grid, in a thumbnail gallery, or on a map. The search results screen offers many ways to sort, filter, and organize your search results, as well as print and e-mail listing information returned by a search.

To open the search results screen from either the search criteria or details screen, click **Results** in the search task bar.



1. **Criteria button**: click to return to the criteria screen.
2. **Details button**: click to open the details screen.
3. **Results count**: displays the total number of search results and the number currently selected.
4. **Save search button**: click to save the current search criteria.

5. **E-mail button**: click to e-mail search results.
6. **Print button**: click to print search results.
7. **Search task bar icons**: enable you to perform additional tasks; move your cursor over an icon to see a descriptive tooltip.
8. **View selection buttons**: click to switch between grid and gallery views.
9. **Grid list**: select a display grid from this listbox.
10. **Grid manager button**: click to open the grid manager.
11. **Toggle images button**: click to hide and restore the image display.
12. **Toggle map button**: click to hide and restore the search results map.
13. **Sort button**: click to select sort options.
14. **Filter button**: click to select filtering options.
15. **Map filter button**: click to narrow the results in the grid or gallery to match the listings currently displayed on the map.
16. **Result ID label**: identifies the listing; corresponds to the numbered "pin" on the map. Move your cursor over the ID label to open the mini-report for the listing.
17. **Detail icon**: click to view details for a listing.
18. **Results map**: displays mapped search results.

Selecting and Deselecting Search Results

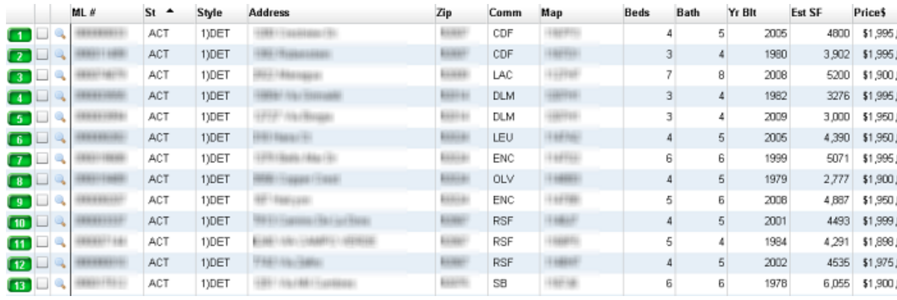
Selecting one or more search results enables you to perform some kind of action on them later (like e-mailing or printing).

▶ To select and deselect search results:

- From a results grid or gallery, click the check box next to the listing. When the box is checked, the listing is selected. When the box is unchecked, the listing is deselected.
- Click the check box in the header row of the check box column to select or deselect all listings at once.

Grid View

Grid view displays search results in a table- or grid-like format.



You can sort a grid on a single column, reorder columns and, with the grid manager, create custom result grids.

Related Topics:

- “The Grid Manager” on page 77

Selecting Grid View

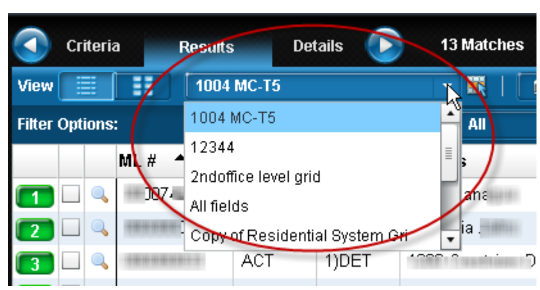
▶ To select grid view:

Click the grid **View** button [ ] under the search task bar.

Loading a Saved Grid

▶ To apply custom or system-defined search results grid:

Select a grid from the grid list.



Sorting the Grid on a Column

You can quickly sort a grid on a single column.

▶ To sort a grid on a single column:

Click the column heading to sort the grid on that column (ascending). Click the column heading again for a descending sort. A triangle in the heading points up or down, indicating the sort direction.

Reordering Grid Columns

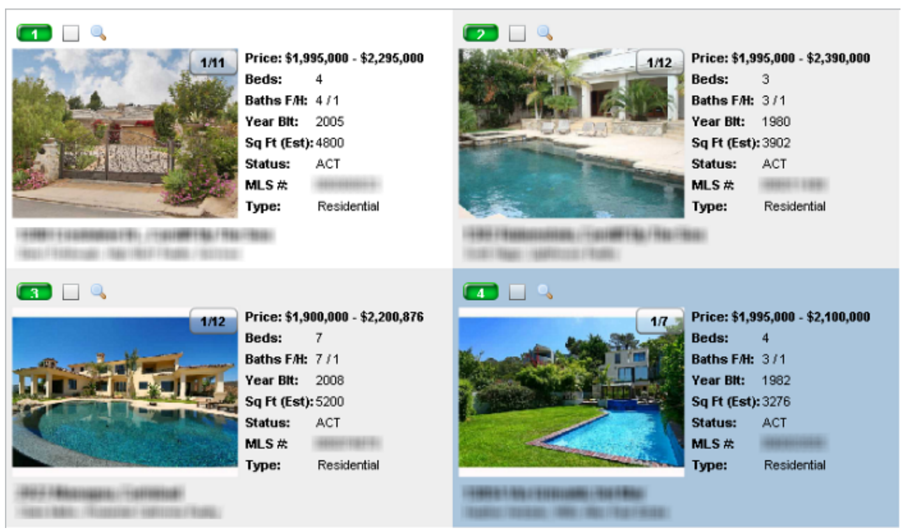
You can drag and drop columns in any order you choose.

▶ To reorder grid columns:

1. Place your cursor over the heading of the column you want to move.
2. Hold down the left mouse button.
3. Drag the column to its new position.
4. Release the left mouse button.

Gallery View

Gallery view displays search results as thumbnail images and summary information.



The button on the image indicates which photo is being displayed: **1/11**, for example, means that the first photo out of 11 is currently shown. Click the button to cycle through the available images.

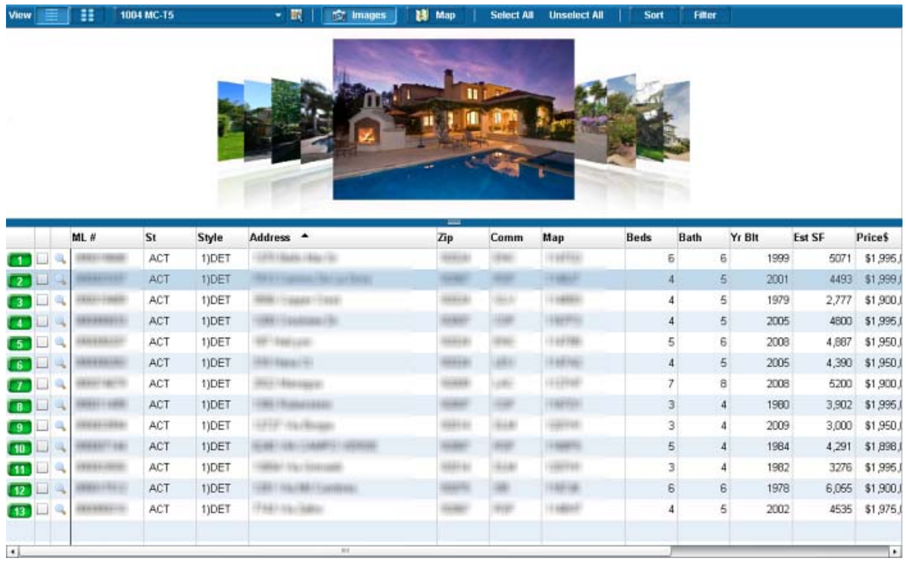
Selecting Gallery View

▶ To select gallery view:

Click the gallery **View** button [] under the search task bar.

Viewing Images

The search results image viewer displays the primary photo for all of the listings returned by a search.



The results grid automatically highlights the listing whose photo is currently displayed.

▶ To select an image to view:

- Click an image in the image viewing pane to bring it to the center.
- Click a listing in the search results grid to bring its photo to the center of the image viewing pane.

▶ To show or hide the image viewing pane:

Click the **Images** button [].

The Search Results Map

The search results map displays the listings returned by a search, represented as numbered “pins.” The number on a pin corresponds to a listing’s ID label in the grid or gallery view.

If you click a map pin, the results grid will automatically highlight the corresponding listing. If you click a listing in the results grid or gallery, the corresponding map pin will change color.

Related Topics:

- “Fusion MLS Maps” on page 120
- “Map View Control Panel” on page 121
- “Map Tools Panel” on page 121
- “Zooming and Panning the Map” on page 122
- “Map Views” on page 123

▶ To hide the map:

Click the **Map** button[].

▶ To restore a hidden map:

Click the **Map** button[

 ].

Filtering by Map

The filter by map feature narrows the search results grid or gallery so that it only displays those listings that are currently visible on the map.

▶ To filter the search results by map:

Click the **Filter Result by Map** button on the search results map. Click the button again to disable the feature.

Sorting Search Results

The sort feature enables you to sort search results on up to three columns.

▶ To sort search results:

1. Click the **Sort** button to open the sort options panel.
2. Select sort columns from the **Sort By** and **Then By** lists.
3. If necessary, click the ascending [] or descending [] buttons to change the sort direction.
4. Click the **X** to close the panel.

Filtering Search Results

Filtering hides search results that do not meet your filtering criteria. It does not permanently remove search results from the grid or gallery view.

You can filter search results by price, and/or by whether or not they are currently selected.

▶ To filter search results:

1. Click the **Filter** button to open the filter options panel.
2. Select the desired filtering options.
3. To apply a price filter, click and drag the minimum/maximum markers on the price slider [

 ].
4. Click the **X** to close the filter options panel.

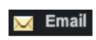
Viewing Listing Details

▶ To view listing details:

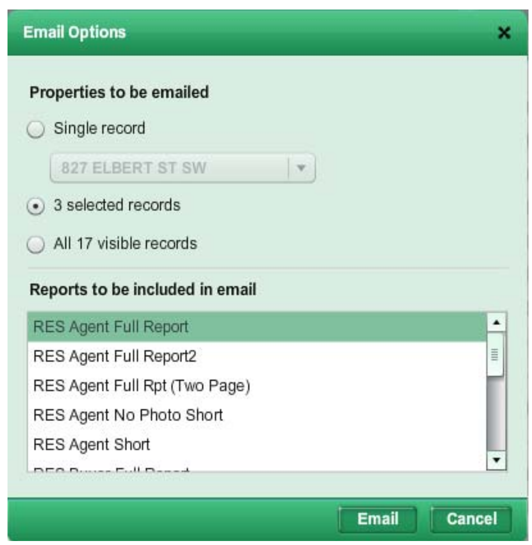
- Click the details button [] next to a listing's ID label to go directly to its details screen.
- Click the **Details** button in the search task bar to open the details screen.

E-mailing Search Results

▶ To e-mail listing reports:

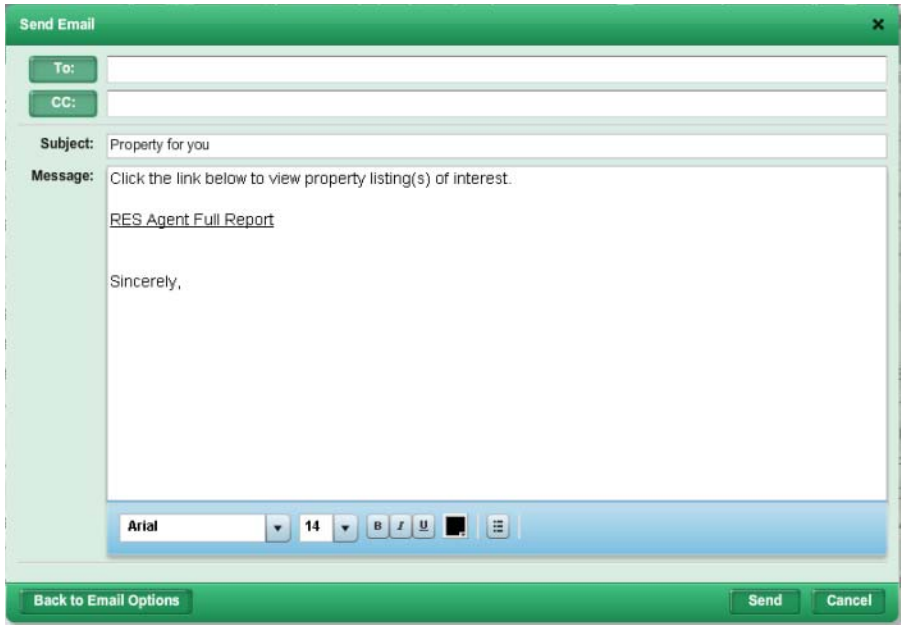
1. If you are mailing from the search results screen, click the check box next to the listings you want to e-mail (you can skip this step if you want to e-mail all listings on the screen).
2. Click the Email icon [

] to open the e-mail options screen.

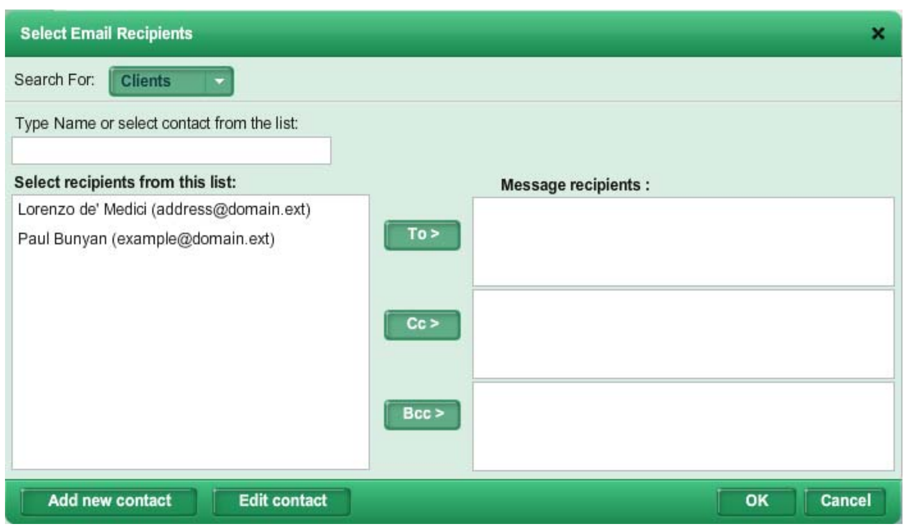


3. Select the properties to send.
4. Select the reports to send.
   - Hold down the CTRL key while clicking reports to select more than one report.

5. Click the **Email** button to open the send e-mail screen.



6. Type the recipients' e-mail addresses in the address boxes (**To** or **CC**). To add someone in your contact list, or an MLS member:
    6.1. Click the To or CC button to open the select recipients screen.



    6.2. If you want to e-mail someone in your contact list, select **Clients** from the **Search for** list. Select **Members** if you want to e-mail another MLS member.
    6.3. If you selected **Clients**, you can narrow the list by typing in the **Type Name** box. If you selected **Members**, type search criteria in the appropriate boxes, and click **Find** to display a list of matching members.
    6.4. Click a person's name in the list to select it.

6.5. Click the **To**, **CC**, or **BCC** button to add the selected recipient's address to the corresponding field.

6.6. When you have finished adding recipients, click **OK** to return to the send e-mail screen.

7. Edit the subject line if desired.
8. Edit the message text if desired. You can use the text editor to format your message.
9. If the recipient has an enabled contact web site, select a delivery option:
   - Send a link to their web site
   - Send a link only to the included reports
10. Click the **Send** button.

Related Topics:

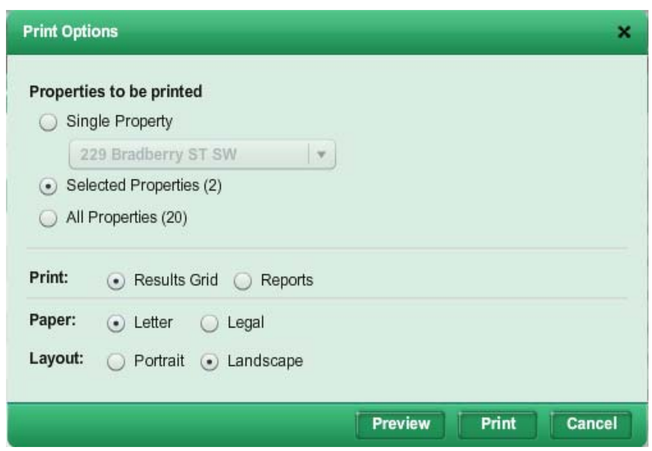
- "The Text Editor" on page 19

Printing Search Results

▶ To print the search results grid:

1. Click the **Print** button [

 ] to open the print options panel.

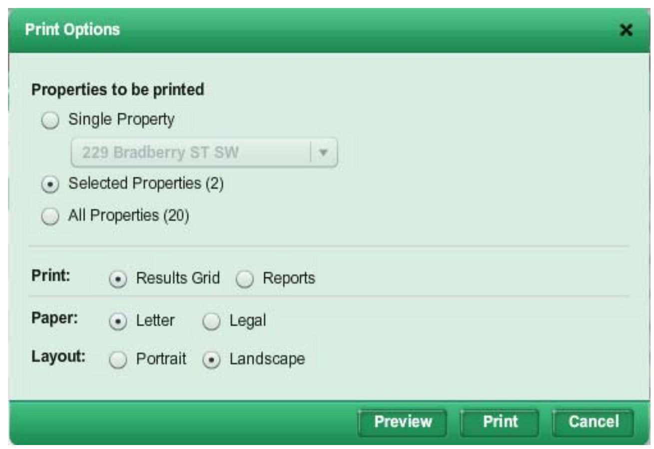


2. Select an item to print:
   - Single record. If you select this option, select the record to print from the list under the option.
   - If you have selected any records from the previous screen, the **Selected** option is available. Choose this to print the selected records.
   - All. Select this option to print all records from the previous screen.

3. Select the **Results Grid** print option.
4. Select a **Paper** option.
5. Select a **Layout** option.
6. If desired, click the **Preview** button to see a print preview.
7. Click the **Print** button to open a print dialog.
8. Select your print options.
9. Click **Print**.

▶ To print listing reports:

1. Click the **Print** button [] to open the print options panel.



2. Select an item to print:
   - Single record. If you select this option, select the record to print from the list under the option.
   - If you have selected any records from the previous screen, the **Selected** option is available. Choose this to print the selected records.
   - All. Select this option to print all records from the previous screen.
3. Select the **Reports** print option.
4. Select the reports to print from the **Reports to be printed** list:
   - The available reports are divided into groups. To expand or collapse the report groups, click the triangle next to the group name.
   - Select the check box next to a report name to include that report in the print job.
5. Click **Show Report Order** to expand the print options screen.
6. Reorder the reports if desired:
   - 6.1. Click the report you want to move and hold the left mouse button.
   - 6.2. Drag the report to its new position.

6.3. Release the left mouse button.

7. If you want to collate the reports by record, rather than report type, select the **Collate reports with a** **to print each listing on consecutive pages** check box.
   - For example, if you selected 3 records to print, and 2 reports for each, selecting this option would result in the following print order:
     - Record 1: Report 1
     - Record 1: Report 2
     - Record 2: Report 1
     - Record 2: Report 2
     - Listing3: Report 1
     - Record 3: Report 2
   - Not selecting this option would result in this print order:
     - Record 1: Report 1
     - Record 2: Report 1
     - Record 3: Report 1
     - Record 1: Report 2
     - Record 2: Report 2
     - Record 3: Report 2
8. If desired, click the **Preview** button to see a print preview.
9. Click the **Print** button to open a print dialog.
10. Select your print options.
11. Click **Print**.

Getting Driving Directions from Search Results

▶ To get driving directions from the search results screen:

1. Select the check box next to the listings you want directions to.
2. From the search task bar, click the directions icon [ ] to open the directions input screen. The selected listings' addresses will appear in the address list.
3. Add, remove, or reorder addresses as desired.
4. Select route options.
5. Click **Get directions**.

▶ To get driving directions for a listing directly from the map:

1. Right-click a listing "pin" on the map to open a context menu.

2. Select an option (**Drive to here** or **Drive from here**) to open the driving directions input screen. Depending on the option you select, the listing's address will be in the starting or ending position.
3. Add, remove, or reorder addresses as desired.
4. Select route options.
5. Click **Get directions**.

Related Topics:

• "Driving Directions" on page 126

Search Details

The search details screen displays in-depth information about each of the listings returned by a search.

Different types of information, such as listing reports, maps, tax data, and demographic information, are displayed in panels. You can specify which panels appear on the search details screen's main viewing area; you can also rearrange the panels to suit your preferences. Panels expand and collapse to make the best use of available screen space.

A **Links** section provides useful links to other sites and applications.

(All panels are shown below in their collapsed state.)

1. **Criteria button**: click to return to the search criteria screen.
2. **Results button**: click to return to the search results screen.

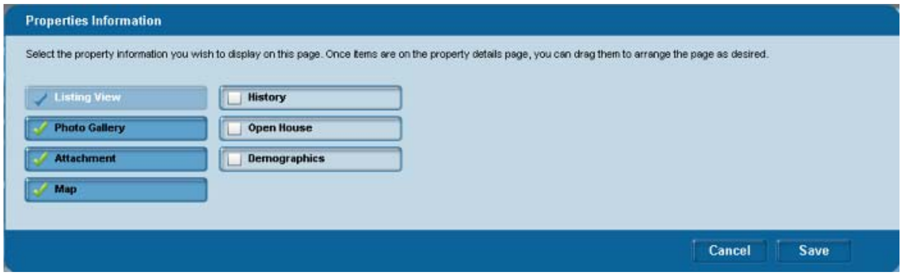
3. **Results count**: displays the total number of search results and the number currently selected
4. **E-mail button**: click to e-mail listing reports.
5. **Print button**: click to print listing reports
6. **Customize button**: click to change which information panels appear in the main viewing area.
7. **Property list**: select a property from this list to display its details.
8. **Select box**: check this box to mark this property as selected.
9. **Property navigation buttons and indicator**: click the arrow buttons to move forward and backward through the search results.
10. **Page Contents**: contains links to the information panels currently visible in the main viewing area. Click a panel name to expand the panel in the main viewing area.
11. **Links**: contains links to other sites and applications, as well as any information panels not currently displayed in the main viewing area.
12. **Main viewing area**: contains listing information panels.

Customizing the Search Details Screen

You can specify which information panels you want to appear in the main viewing area. These panels will also be available from the **Page Contents** section. Panels that you do not wish to see in the main viewing area will still be available from the **Links** section of the search details screen.

To customize the search details screen:

1. Click the **Customize this Page** button to open the page preferences screen.



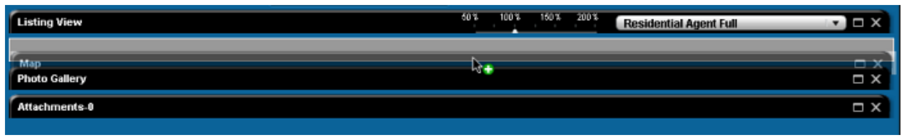
2. Click options to select or select them. Selected panels will appear in the main viewing area.
3. Click **Save**.

Rearranging Panels

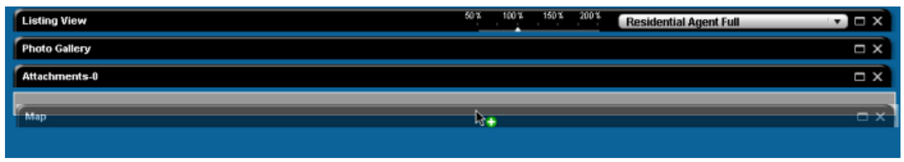
You can drag and drop information panels to rearrange them.

▶ To rearrange information panels:

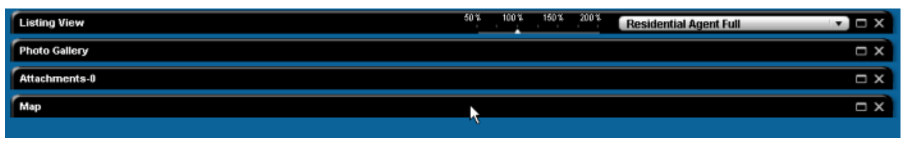
1. Use your mouse to move the cursor over the title bar of the panel you want to move.
2. Hold down the left mouse button.
3. Move the mouse to start dragging the panel, which will become semi-transparent.



4. Drag the panel to the general area where you want to place it. As you move the panel, available spaces will appear as outlined rectangles.



5. Release the left mouse button to drop the panel in its new position.



Changing the Current Property

▶ To view a different listing:

- Select a property from the **Property** list.
- Click the previous [] or next [] buttons to move through the results set.

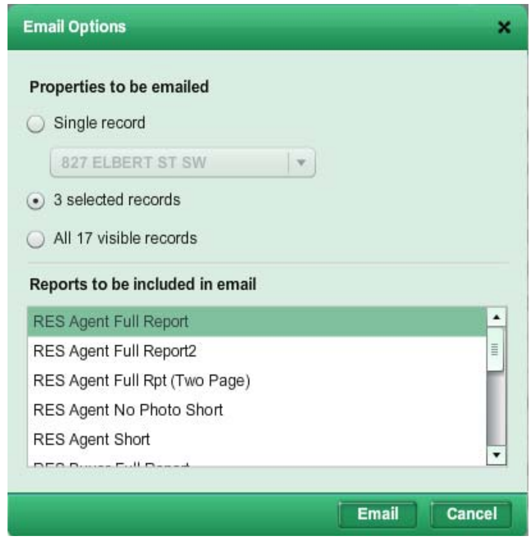
E-mailing Reports from the Search Details Screen

▶ To e-mail listing reports:

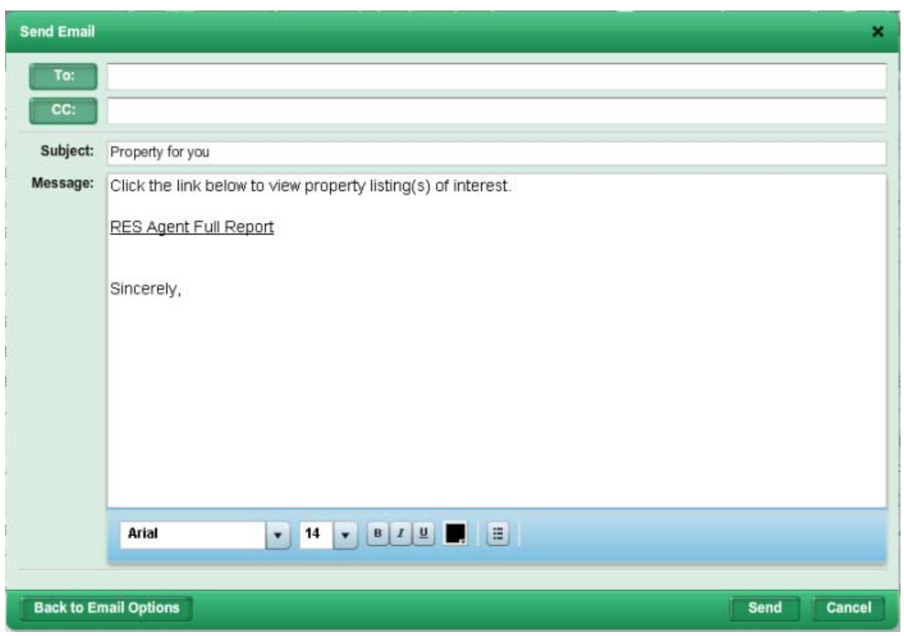
1. If you are mailing from the search results screen, click the check box next to the listings you want to e-mail (you can skip this step if you want to e-mail all listings on the screen).

2. Click the Email icon [

] to open the e-mail options screen.

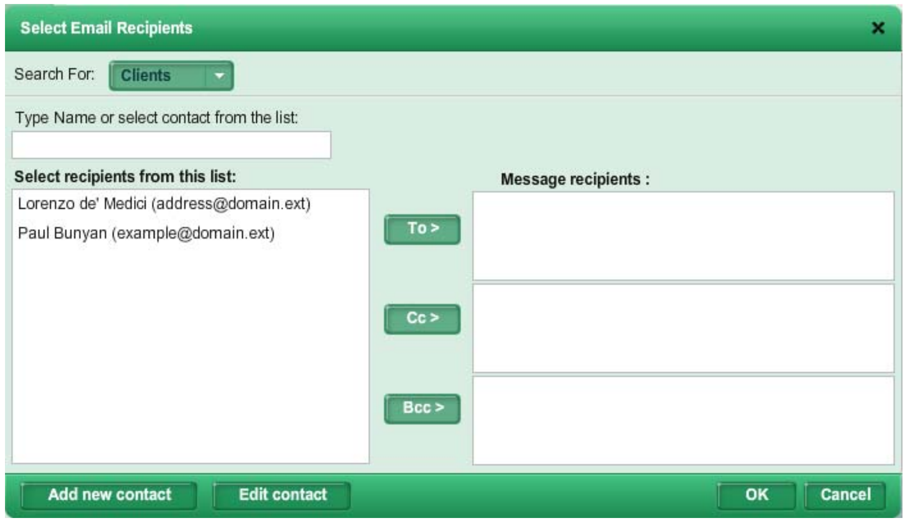


3. Select the properties to send.
4. Select the reports to send.
   - Hold down the CTRL key while clicking reports to select more than one report.
5. Click the **Email** button to open the send e-mail screen.



6. Type the recipients' e-mail addresses in the address boxes (**To** or **CC**). To add someone in your contact list, or an MLS member:

6.1. Click the To or CC button to open the select recipients screen.



6.2. If you want to e-mail someone in your contact list, select **Clients** from the **Search for** list. Select **Members** if you want to e-mail another MLS member.

6.3. If you selected **Clients**, you can narrow the list by typing in the **Type Name** box. If you selected **Members**, type search criteria in the appropriate boxes, and click **Find** to display a list of matching members.

6.4. Click a person's name in the list to select it.

6.5. Click the **To**, **CC**, or **BCC** button to add the selected recipient's address to the corresponding field.

6.6. When you have finished adding recipients, click **OK** to return to the send e-mail screen.

7. Edit the subject line if desired.
8. Edit the message text if desired. You can use the text editor to format your message.
9. If the recipient has an enabled contact web site, select a delivery option:
   - Send a link to their web site
   - Send a link only to the included reports
10. Click the **Send** button.

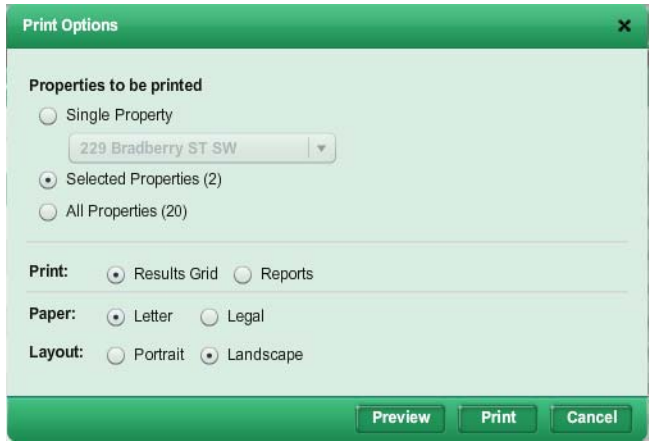
Related Topics:

- "The Text Editor" on page 19

Printing Listing Reports from the Search Details Page

▶ To print the search results grid:

1. Click the **Print** button [] to open the print options panel.

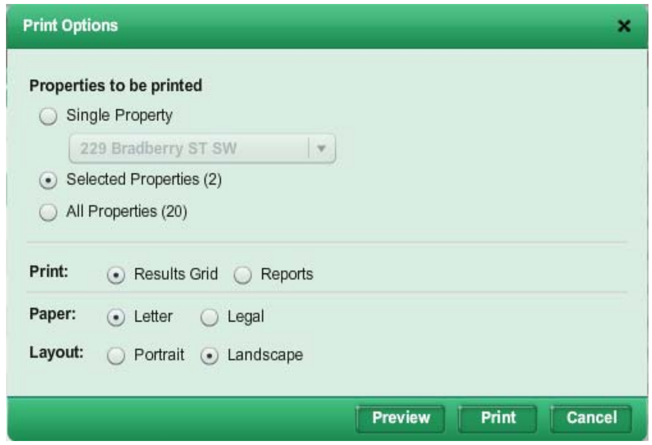


2. Select an item to print:
   - Single record. If you select this option, select the record to print from the list under the option.
   - If you have selected any records from the previous screen, the **Selected** option is available. Choose this to print the selected records.
   - All. Select this option to print all records from the previous screen.
3. Select the **Results Grid** print option.
4. Select a **Paper** option.
5. Select a **Layout** option.
6. If desired, click the **Preview** button to see a print preview.
7. Click the **Print** button to open a print dialog.
8. Select your print options.
9. Click **Print**.

▶ To print listing reports:

1. Click the **Print** button [

] to open the print options panel.



2. Select an item to print:
   - Single record. If you select this option, select the record to print from the list under the option.
   - If you have selected any records from the previous screen, the **Selected** option is available. Choose this to print the selected records.
   - All. Select this option to print all records from the previous screen.
3. Select the **Reports** print option.
4. Select the reports to print from the **Reports to be printed** list:
   - The available reports are divided into groups. To expand or collapse the report groups, click the triangle next to the group name.
   - Select the check box next to a report name to include that report in the print job.
5. Click **Show Report Order** to expand the print options screen.
6. Reorder the reports if desired:
   6.1. Click the report you want to move and hold the left mouse button.
   6.2. Drag the report to its new position.
   6.3. Release the left mouse button.
7. If you want to collate the reports by record, rather than report type, select the **Collate reports with a**  **to print each listing on consecutive pages** check box.
   - For example, if you selected 3 records to print, and 2 reports for each, selecting this option would result in the following print order:
     - Record 1: Report 1
     - Record 1: Report 2
     - Record 2: Report 1

    - Record 2: Report 2
    - Listing3: Report 1
    - Record 3: Report 2
  - Not selecting this option would result in this print order:
    - Record 1: Report 1
    - Record 2: Report 1
    - Record 3: Report 1
    - Record 1: Report 2
    - Record 2: Report 2
    - Record 3: Report 2

8. If desired, click the **Preview** button to see a print preview.
9. Click the **Print** button to open a print dialog.
10. Select your print options.
11. Click **Print**.

Information Panels

Each information panel on the search details screen displays a specific kind of information about the listing, such as map location, area demographics, or photos.

You can customize which panels appear in the main viewing area. These panels have a corresponding link in the Page Contents section of the search details screen, from which you can expand the panel. Panels that you have chosen not to display are still accessible from the Links section. Clicking a link opens the panel in a new window.

Related Topics:

- "Customizing the Search Details Screen" on page 60
- "Rearranging Panels" on page 60

▶ To expand a panel:

- Click the panel's expand button [ ].
- Click the panel's link in the **Page Contents** section.

▶ To collapse a panel:

Click the panel's collapse button [ ].

▶ To remove a panel:

Click the panel's close button [ ]. If you remove a panel by mistake, you can restore it by clicking the Customize this page button and selecting the panel from the page preferences screen.

The Listing View Panel

The listing view panel displays a detail report for a listing. A slider enables you to zoom in and out for easier viewing.

▶ To change detail reports:

Select an available detail report from the list in the listing view panel's title bar.

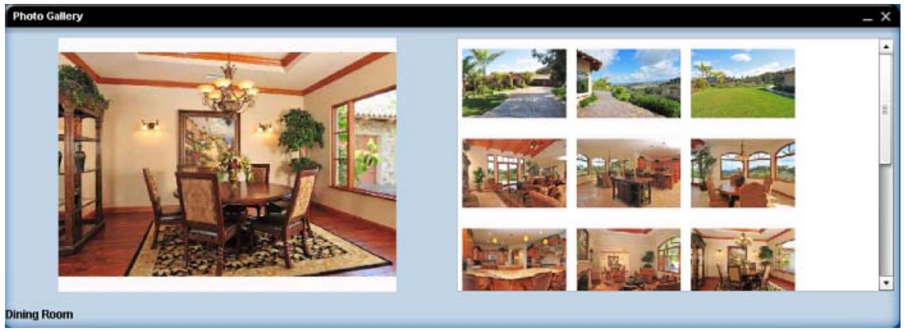
▶ To zoom in and out of a detail report:

1. Put your cursor over the triangle on the magnification slider.

2. Hold down the left mouse button.
3. Drag the slider to the left or right to set the magnfication.
4. Release the left mouse button.

The Photo Gallery Panel

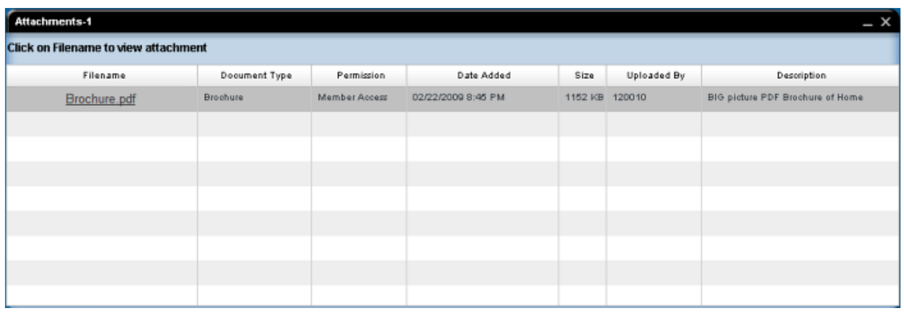
The photo gallery panel displays a listing's photos.



Move your cursor over a thumbnail image on the right to see it in the main display on the left.

The Attachments Panel

The attachments panel displays any attachments associated with the listing.

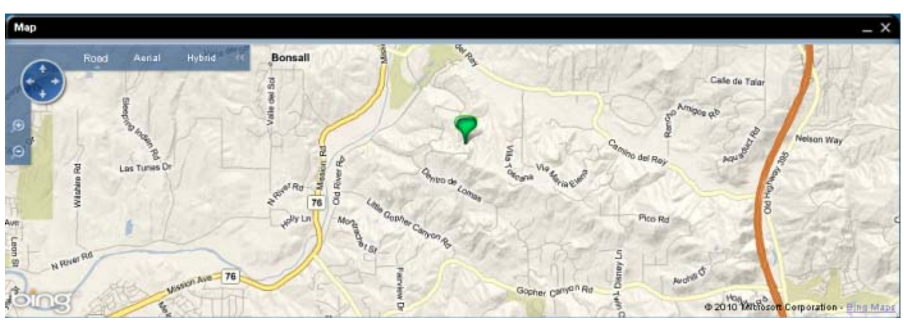


Click an attachment link in the **Filename** column to open it.

You can sort the list by clicking a column heading.

The Map Panel

The map panel displays the listing's location on a map.

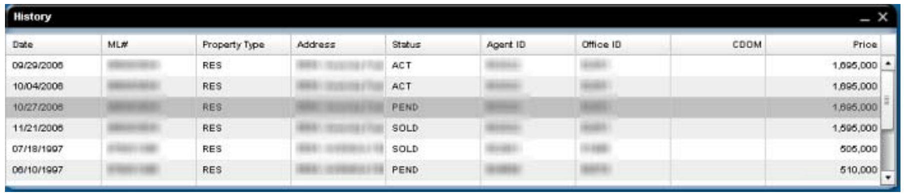


Related Topics:

- “Map View Control Panel” on page 121
- “Map Tools Panel” on page 121
- “Zooming and Panning the Map” on page 122
- “Map Views” on page 123

The History Panel

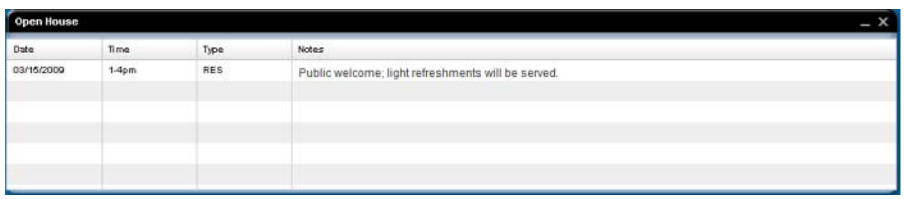
The history panel displays a listing’s MLS activity.



You can sort the list by clicking a column heading.

The Open House Panel

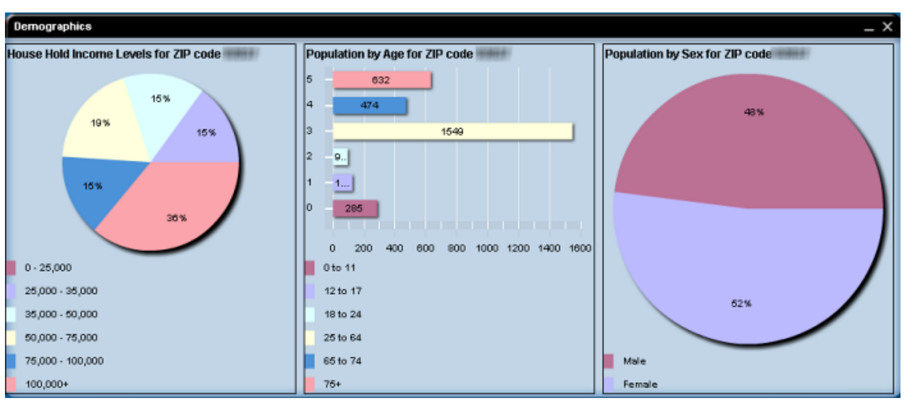
The open house panel displays open house data for a listing.



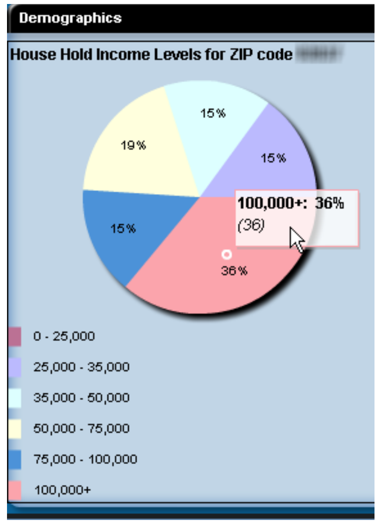
You can sort the list by clicking a column heading.

The Demographics Panel

The demographics panel displays demographic data about a listing’s area.



Move the cursor over a chart section to see a pop-up display.



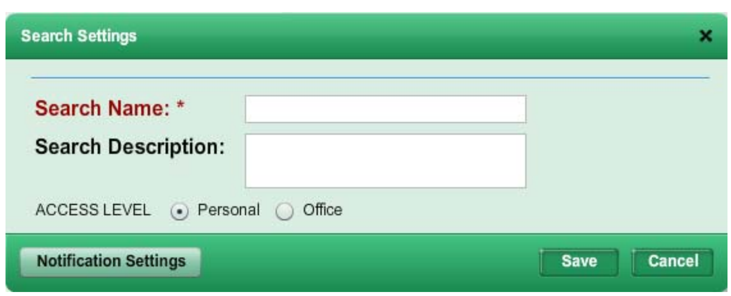
Saved Searches

You can save search criteria that you run often, or want to use for a prospect or hotsheet.

Creating Saved Searches

▶ To create a new saved search:

1. Set your search criteria. View the results on the results screen, if desired.
2. Click the **Save Search** button to open the save search screen.

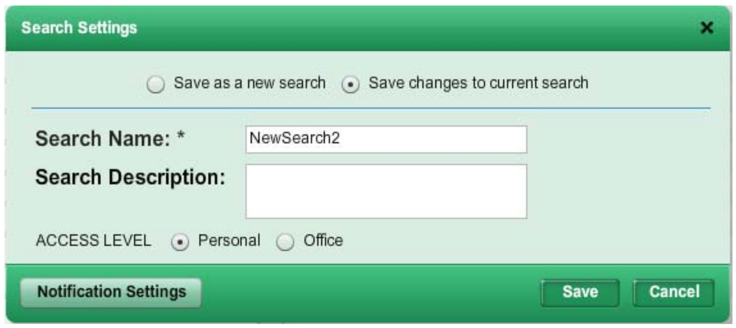


3. Type a name in the **Search Name** box.
4. If desired, type a description of the search in the **Description** box.
5. Depending on your permission level, you may have the option to make the search available to your firm, office, or just yourself.
6. If you want to attach the search to a contact, click the **Notfication Settings** button and set the notification options.

7. Click **Save**.

▶ To create a new saved search based on an existing saved search:

1. Load a saved search.
2. Modify the search criteria as needed.
3. Click the **Save Search** button to open the save search screen.



4. Select Save as new search.
5. Type a name in the **Search Name** box.
6. If desired, type a description of the search in the **Description** box.
7. Depending on your permission level, you may have the option to make the search available to your firm, office, or just yourself.
8. If you want to attach the search to a contact, click the **Notfication Settings** button and set the notification options.
9. Click **Save**.

Related Topics:

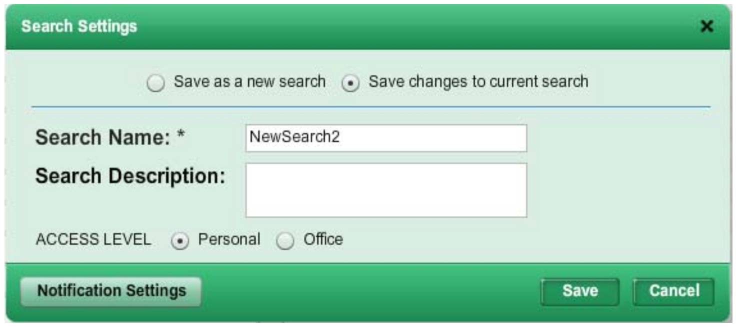
• "Loading a Saved Custom or System Search" on page 40

Modifying Saved Searches

▶ To modify a saved search:

1. Load a saved search.
2. Modify the search criteria as needed.

3. Click the **Save Search** button to open the save search screen.



4. Select **Save Changes to current search**.
5. If you want to attach the search to a contact, click the **Notfication Settings** button and set the notification options.
6. Click **Save**.

Related Topics:

- "Loading a Saved Custom or System Search" on page 40

The Search Manager

The search manager organizes your saved searches and enables you to associate them with contacts for prospecting. From the Search Manager, you can quickly review and edit auto-notification settings such as frequency and expiration date. You can also access a contact website from the search manager.

To open the Search Manager, select **Search Manager** from the **Search** menu.

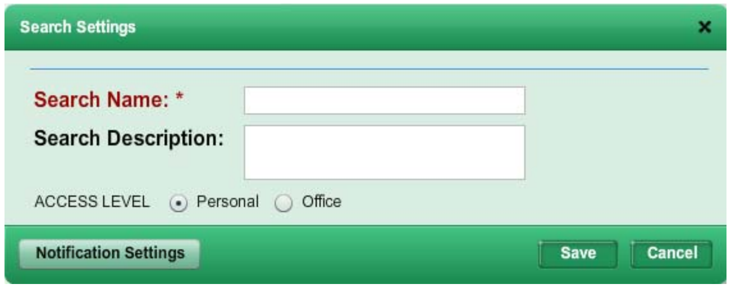
Click a contact's name to view his or her information in the contact manager detail panel. Click a search name to open the search criteria page.

Creating Saved Searches from the Search Manager

▶ To create a new saved search:

1. From the search manager, click the **New Search** button to open the search criteria page.
2. Set the search criteria as desired.

3. Click the **Save Search** button to open the save search screen.

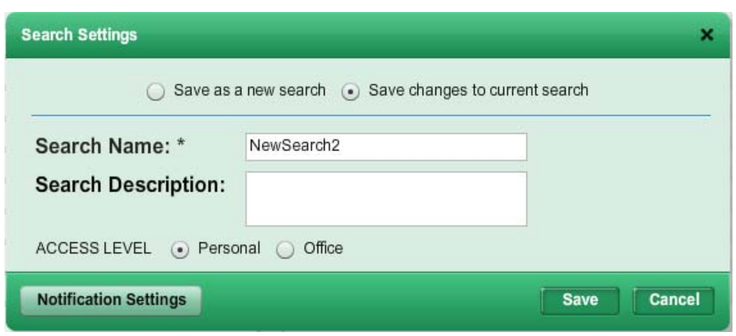


4. Type a name in the **Search Name** box.
5. If desired, type a description of the search in the **Description** box.
6. Depending on your permission level, you may have the option to make the search available to your firm, office, or just yourself.
7. If you want to attach the search to a contact, click the **Notfication Settings** button and set the notification options.
8. Click **Save**.

Modifying Search Criteria from the Search Manager

▶ To modify search criteria for a saved search:

1. From the search manager, click the name of the search you want to modify. The search criteria page will open.
2. Make any desired changes.
3. Click the **Save Search** button to open the save search screen.



4. Select **Save Changes to current search**.
5. Click **Save**.

Deleting Searches

▶ To delete searches from the search manager:

1. From the search manager, select the check box next to the searches you want to delete.
2. Click the arrow on the **Tools** menu and select **Delete**.
3. When prompted to confirm the deletion, click **OK**.

Renaming Searches

▶ To rename a saved search:

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Type a new name in the **Search Name** box.
4. Click **Save**.

Associating an Existing Search with a Contact

▶ To associate a search with a contact:

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Select a contact from the **Link this search to this contact** list.
   - To create a new contact from the settings screen, click the new contact button [].
4. Click **Save**.

Enabling and Disabling Auto-notification

▶ To enable auto-notification:

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Select the **Turn on auto-notification for this search** check box.
4. If the search is associated with a contact, select how you want him or her to view listings:
   - Contact web site
   - E-mailed report
5. Specify the other search settings as desired.

6. Click **Save**.

▶ To disable auto-notification

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Deselect the **Turn on auto-notification for this search** check box.
4. Click **Save**.

Auto-notification Settings

The search settings screen enables you to change a search's auto-notification settings. To open the search settings screen, click the link in the **Active** column of the search manager.

Settings Tab

From the **Settings** tab, you can

- Associate a contact with the search
- Activate and deactivate auto-notification
- Set the number of days that auto-notification will be active
- Select how you want listings delivered to your contact (via website or e-mailed report)
- Edit the description of the search that appears on the client website
- Specify the default search results grid you want to use
- Set the access level for the search (firm, office, personal). This option may not be available to all users.

Frequency Tab

The **Frequency** tab enables you to specify

- How often auto-notification runs
- The conditions (e.g., price change, status change) that will cause a listing to be re-sent

Contact Email Tab

From the **Contact Email** tab, you can

- Specify additional recipients for auto-notification e-mails
- Set the text that appears in auto-notification e-mails

- Specify the report format you want the client website to use

Agent Notification Tab

The **Agent Notification** tab enables you to

- Specify if, and how, you want to receive copies of auto-notification e-mails
- The report format you want to receive

Viewing Search Results from the Search Manager

▶ To view results for a saved search from the search manager:

From the search manager, click the link in the **#New** (to view only new results) or **#All** column (to view all results).

The search results page for a saved search provides all the features of a regular search results page, plus a **Tools** menu. Select listings and choose an option from the **Tools** menu to

- Mark a listing as viewed, new, favorite, reject, etc.
- Remove a designation

Extending the Expiry Date

▶ To extend a search's auto-notification expiry date:

1. From the search manager, select the check box next to the search whose expiry date you want to extend.
2. Click the arrow on the **Tools** menu and select **Extend Expiry Date** to open the expiry date dialog.
3. Enter the number of days to extend auto-notification.
4. Click **Apply Now**.

Marking Searches as Viewed

Marking a search as viewed changes the status of all new search results from "new" to "viewed."

▶ To mark searches as viewed:

1. From the search manager, select the check box next to the searches you want to mark as viewed.
2. Click the arrow on the **Tools** menu and select **Mark as Viewed**.
3. When prompted to confirm, click **OK**.

The Grid Manager

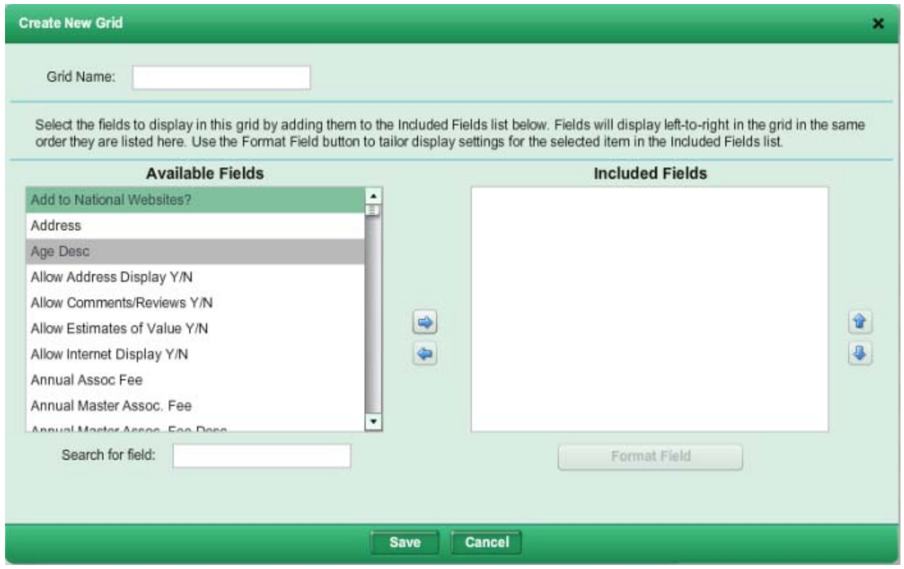
With the grid manager, you can create custom grids that display the columns you want to see, in the order you want them to appear. You can set default grids and specify the sort order for your custom grids.

Creating Grids

▶ To create a new search results grid:

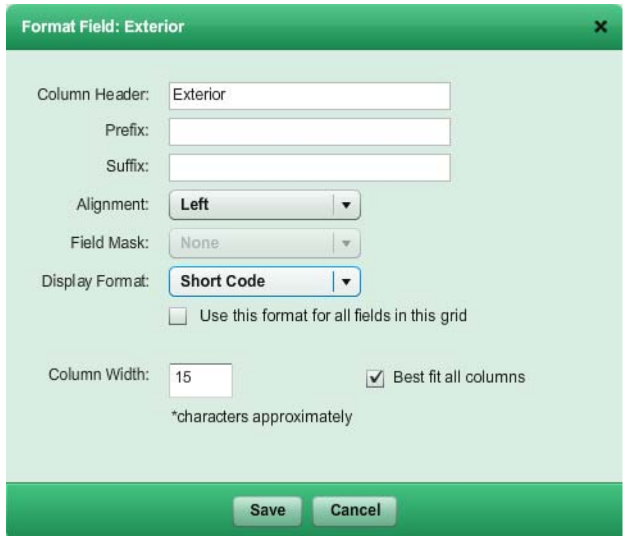
1. Click the grid manager icon [ ] to open the grid manager.

2. Click **Create New Grid** to open the grid editor.



3. Type a name for the grid in the **Grid Name** box.
4. Move the fields you want to appear in the grid from the **Available Fields** list to the **Included Fields** list.
   - Drag and drop fields between lists.
   - Click a field to select it, and use the move right [] and move left [] buttons to move it between lists.
   - Hold down the CTRL key while clicking fields to select multiple fields.
   - Hold down the Shift key to select a range of fields.
   - Type a field name (or part of a field name) in the **Search for field** box to narrow the list of available fields.
5. Arrange the included fields in the order you want them to appear.
   - Drag and drop fields
   - Click a field to select it, and use the move up [] and move down [] buttons to move it up or down.
6. If desired, you can modify the formatting for the included fields.
   6.1. Click a field to select it.

6.2. Click the **Format Field** button to open the field formatter



6.3. Modify the formatting as needed.

6.4. Click **Save** to return to the grid editor.

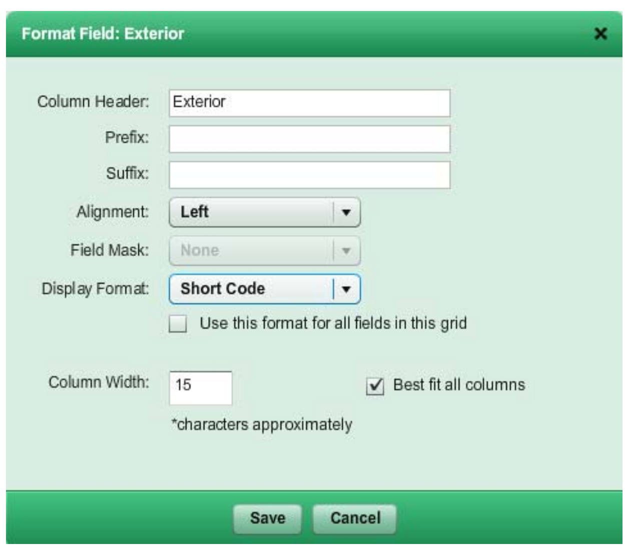
7. Click **Save**.

Related Topics:

- “Field Format Settings” on page 79

Field Format Settings

A field’s format settings determine how the field is displayed in the grid.



Depending on the type of field, some settings may be disabled.

- **Column Header**: the text that appears at the top of the grid column.
- **Prefix**: text that precedes data displayed in the column. For example, if the prefix is "approximately" then all data in the grid column will be prefaced by the word "approximately."
- **Suffix**: text that follows data displayed in the column. For example, if the suffix is "or more" then all data in the grid column will be followed by the word "approximately."
- **Alignment**: text alignment in the column (left, middle, or right).
- **Field mask**: sets formatting for numeric fields. For example, selecting ####.00 results in numeric data being displayed to two decimal places. Selecting ##,###,### results in a comma being used to separate thousands groups in the large numbers.
- **Display Format**: used for listbox fields. Specifies whether short codes or full descriptions will be displayed.
- **Use this format for all fields in this grid**: used for listbox fields. If this check box is selected, the Display Format setting will be applied to all listbox fields in the grid.
- **Column width**: sets the width for the grid column.

Editing Grids

You can edit grids that you have created. Depending on your permission level, you may be able to edit other grids (for your office or firm) as well.

If you want to make changes to an office-, firm-, or system- level grid that you do not have permission to edit, make a copy of the grid and edit the copy.

▶ To edit a grid:

1. Click the grid manager icon [ ] to open the grid manager.

2. Click the grid you want to edit, to select it.
3. Click the **Edit Grid** button to open the grid editor.

4. Make any desired changes to the grid name, included fields, or field formats.
5. Click **Save**.

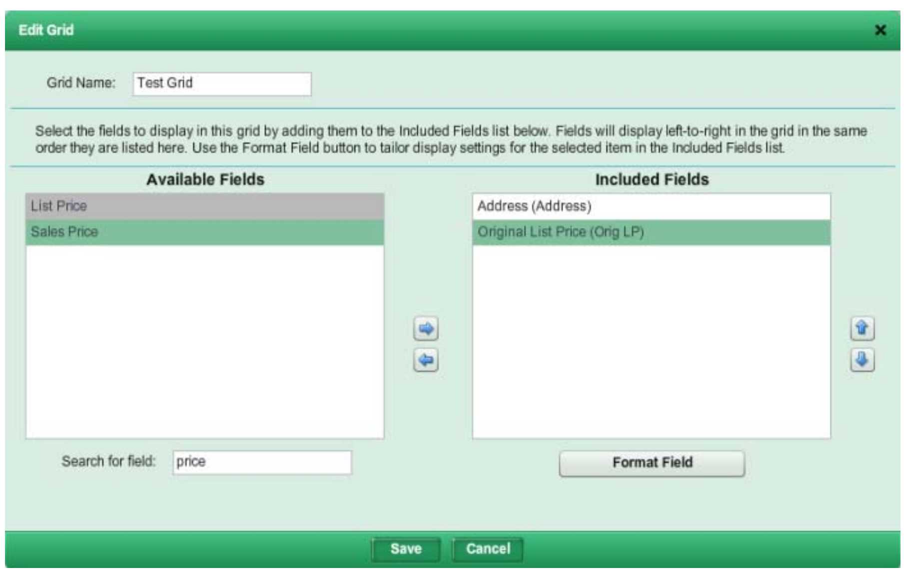
Copying Grids

When you copy a grid, it cannot have the same name as the original.

▶ To copy a grid:

1. Click the grid manager icon [] to open the grid manager.

2. Click the grid you want to copy, to select it.
3. Click **Copy Grid** to open the grid editor.



4. Type a new name in the **Grid Name** box, or accept the default.
5. Make any other desired changes.
6. Click **Save**.

Deleting Grids

You can delete any grid that you have created. Depending on your permission level, you may be able to delete other grids (for your office or firm) as well.

▶ To delete a grid:

1. Click the grid manager icon [] to open the grid manager.

2. Click the grid you want to delete, to select it.
3. Click **Delete Grid**.
4. When prompted to confirm the deletion, click **Yes**.

Default Grids

The default grid is the grid that automatically loads when you open a page that uses a grid to display data, such as the search results page or the contact manager. Your current default grid is indicated by a [] in the grid manager.

▶ To set the default grid:

1. Click the grid manager icon [] to open the grid manager.

2. Click the grid you want to set as the default, to select it.
3. Click Set as **Default Grid**.

Grid Sort Order

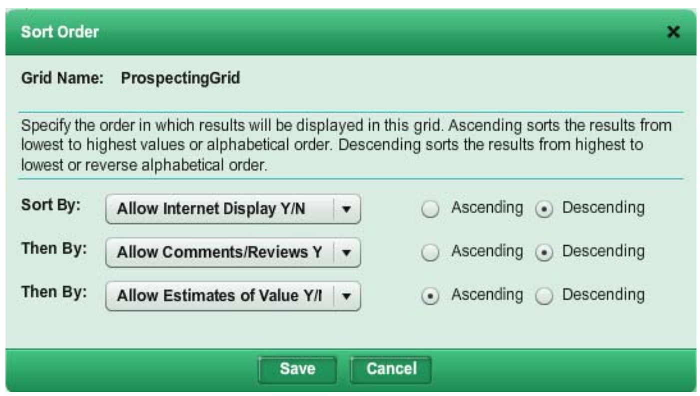
You can set the sort order for grids that you have created. Depending on your permission level, you may be able to set the sort order for other grids (for your office or firm) as well.

You can sort on up to three columns.

▶ To set the sort order for a grid:

1. Click the grid manager icon [ ] to open the grid manager.

2. Click the grid whose sort order you want to set, to select it.
3. Click **Set Sort Order** to open the sort order screen.



4. Select a column from the **Sort By** list.
5. Select **Ascending** or **Descending**.
6. Select additional sort fields from the **Then By** lists as needed, and set the sort direction for each.
7. Click **Save**.

Member Search

The member search feature enables you to locate other MLS members. You can access the member search screen from the **Search** menu.

Office Search

The office search feature enables you to locate other MLS offices. You can access the office search screen from the **Search** menu.

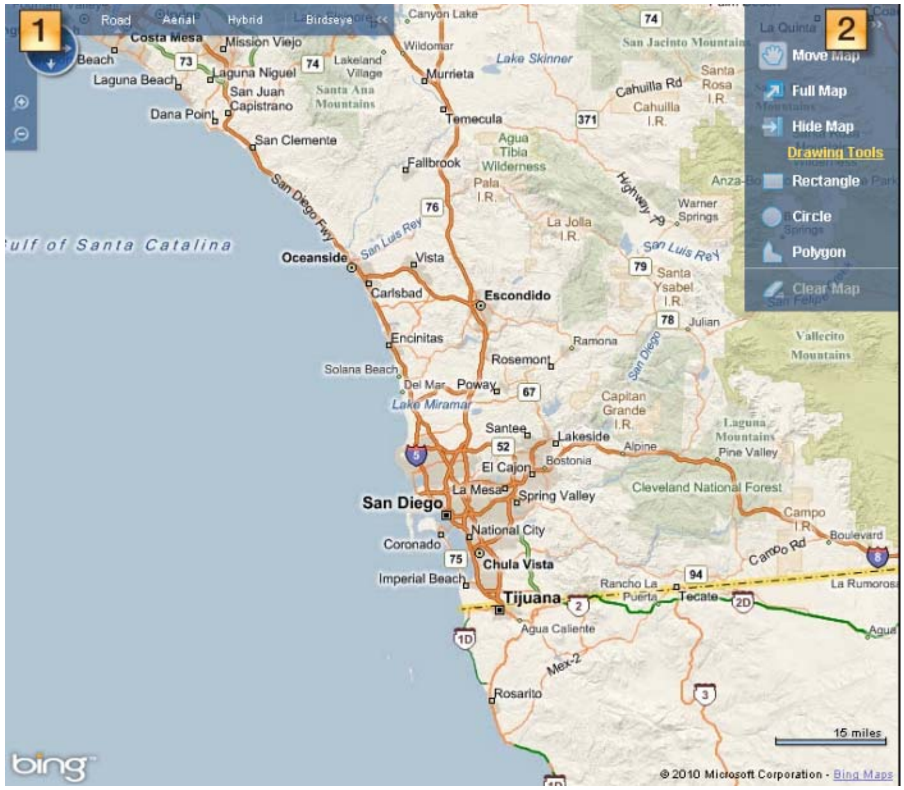
Open House Search

The open house search feature enables you to find open house events. You can access the open house search screen from the **Search** menu.

Maps

Fusion MLS Maps

The Fusion MLS map displays listings returned by a search, and enables you to create map-based searches. Two panels (map view control and map tools) provide controls for manipulating the map



1. Map view control panel: enables you to adjust the map.
2. Map tools panel: enables you to draw map searches. Only available from the search map.

Mapped listings appear as “pins” on the map. Pins are color-coded by status.

Map View Control Panel

The map view control panel contains controls that enable you to manipulate the map: change the view, zoom in and out, and pan. You can collapse the panel to see more of the map.

▶ To collapse and expand the map view controls panel:

When the panel is expanded, click the collapse button []. The panel will collapse to a single button []. To restore the panel, click the button.

Map Tools Panel

The map tools panel contains controls for moving the map and creating map searches. You can collapse the panel to see more of the map. This panel is only available from the search criteria screen.

▶ To collapse and expand the map tools panel:

When the panel is expanded, click the collapse button [] to collapse it.

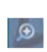
When the panel is collapsed, click the expand button [] to expand it.

Zooming and Panning the Map

▶ To pan the map:

- From the map view control panel, click an arrow on the pan control [] to pan the map in that direction.
- From the map tools panel, click the **Move Map** button []. Move your cursor over the map (the cursor's shape will change to resemble a hand []). Hold down the left mouse button and drag the map (if the map tools panel is not available, you can still drag the map with the mouse).

▶ To zoom in and out:

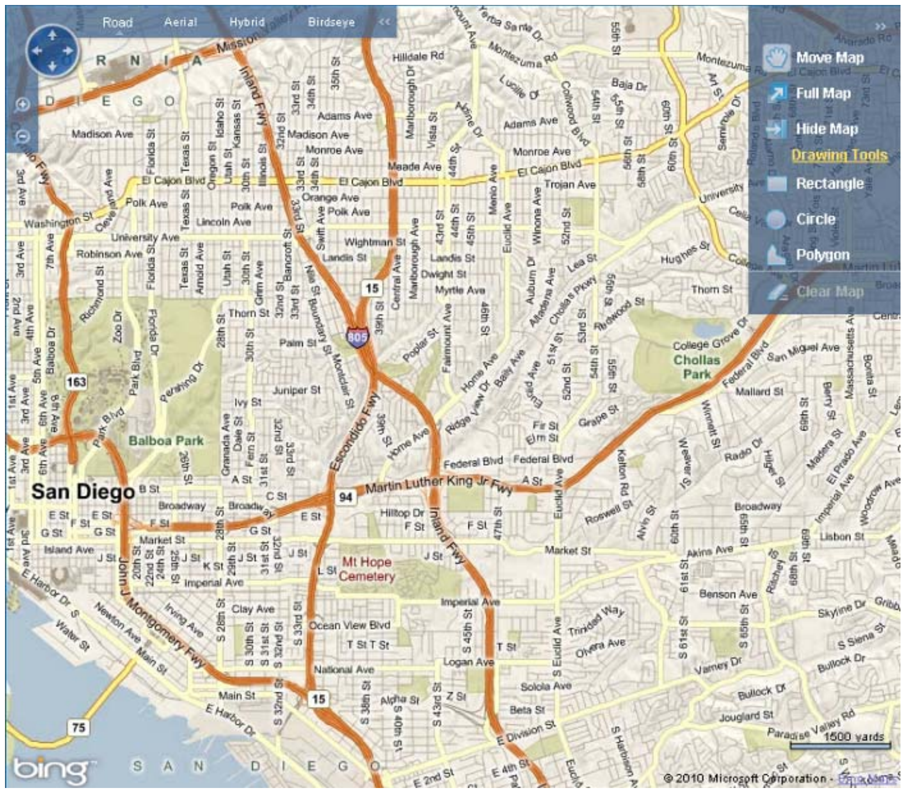
Click the zoom in [] and zoom out [] buttons on the map view control panel.

Map Views

Map views are different ways of displaying map information. Fusion MLS offers several map views.

Road View

Road view displays a road map.

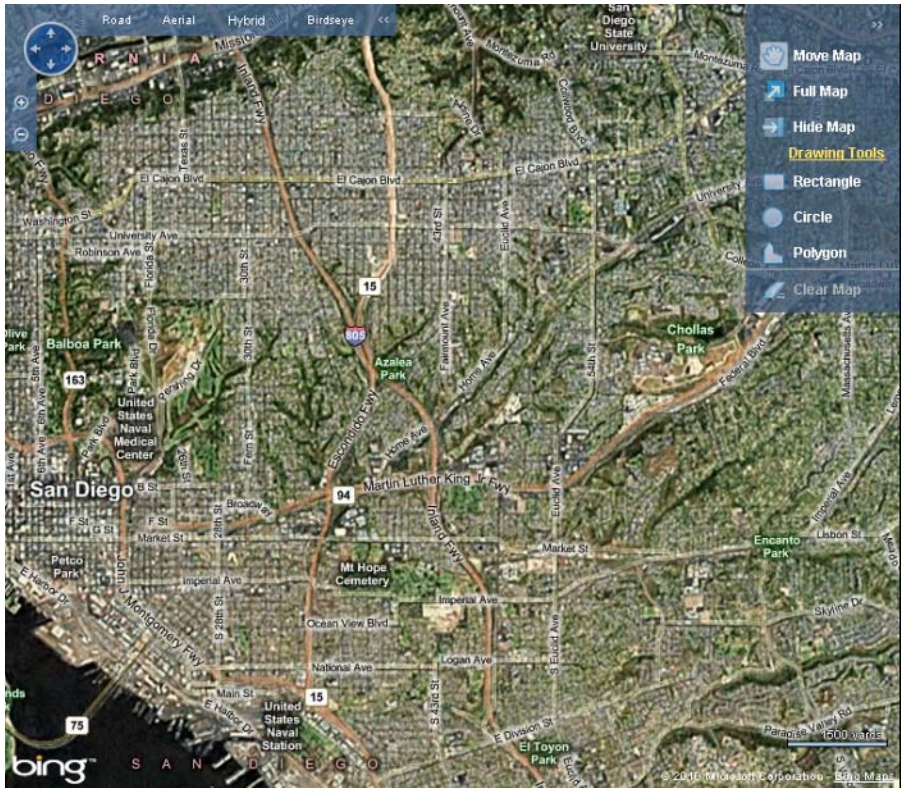


Aerial View

Aerial view displays a photographic image taken from above.

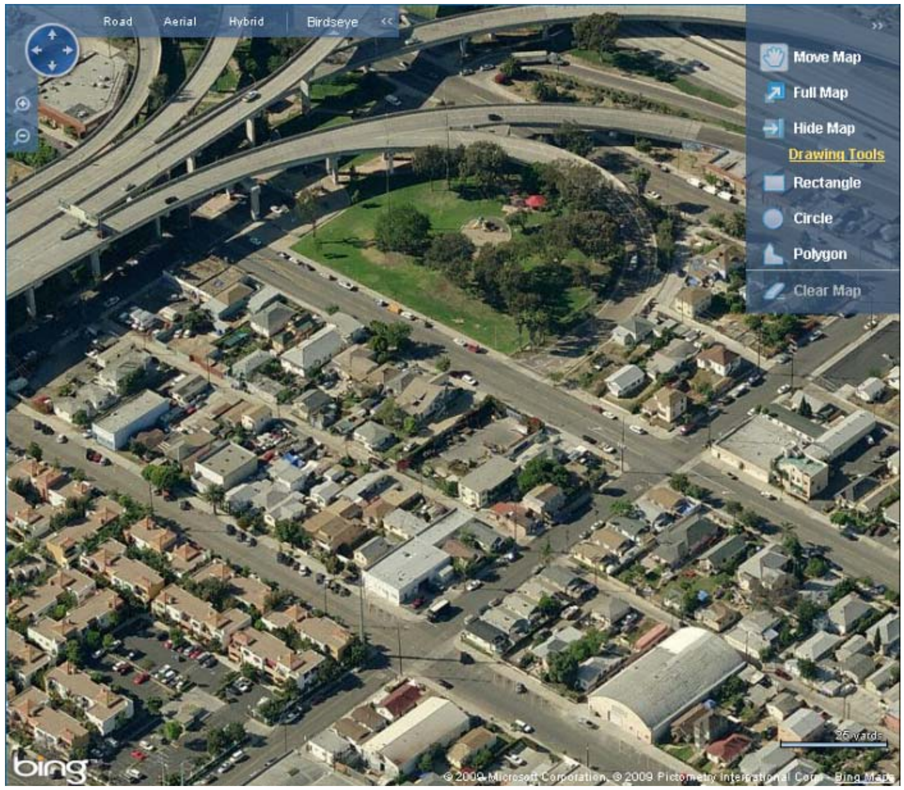
Hybrid View

Hybrid view displays an aerial photograph with a road map overlay.



Birdseye View

Birdseye view displays a close-range aerial photograph of the area currently in the center of the map. Birdseye view may not be available if the map zoom level is too far out, or if there are no buildings in the area.



Changing Views

▶ To change map views:

Click one of the map views available in the map view control panel:

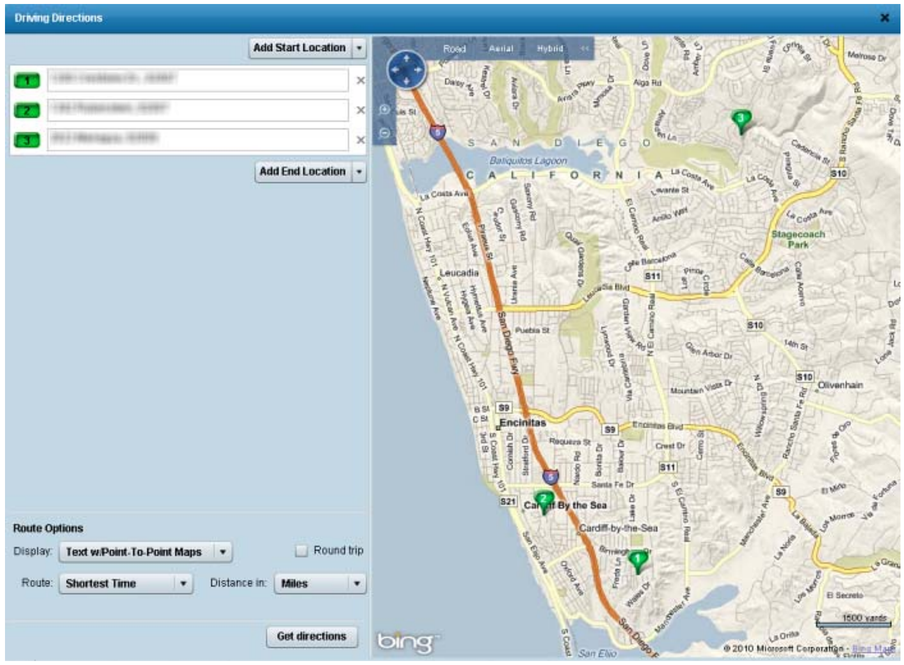
- **Road**
- **Aerial**
- **Hybrid**
- **Birdseye**

Driving Directions

The Fusion MLS directions feature enables you to get driving directions for up to 10 map locations. You can generate driving directions from a search results list, or directly from a point on the map.

Driving Directions Input Screen

The input screen is where you specify the addresses for which you want driving directions, and in what order you want them to appear. You also select route options from the input screen.



Adding Addresses

▶ To add an address to the driving directions input screen:

Select an option from the **Add Start Location** or **Add End Location** list:

- **New Location**: creates a blank address box
- **My Office**: adds an address box populated with your office address

Removing Addresses

▶ To remove an address from the driving directions input screen:

Click the **X** next to the address box.

Reordering Addresses

▶ To change the order of addresses on the driving directions input screen:

1. Click the numbered button next to the address and hold the left mouse button.
2. Drag the address to a new position in the address list.
3. Release the mouse button.

Route Options

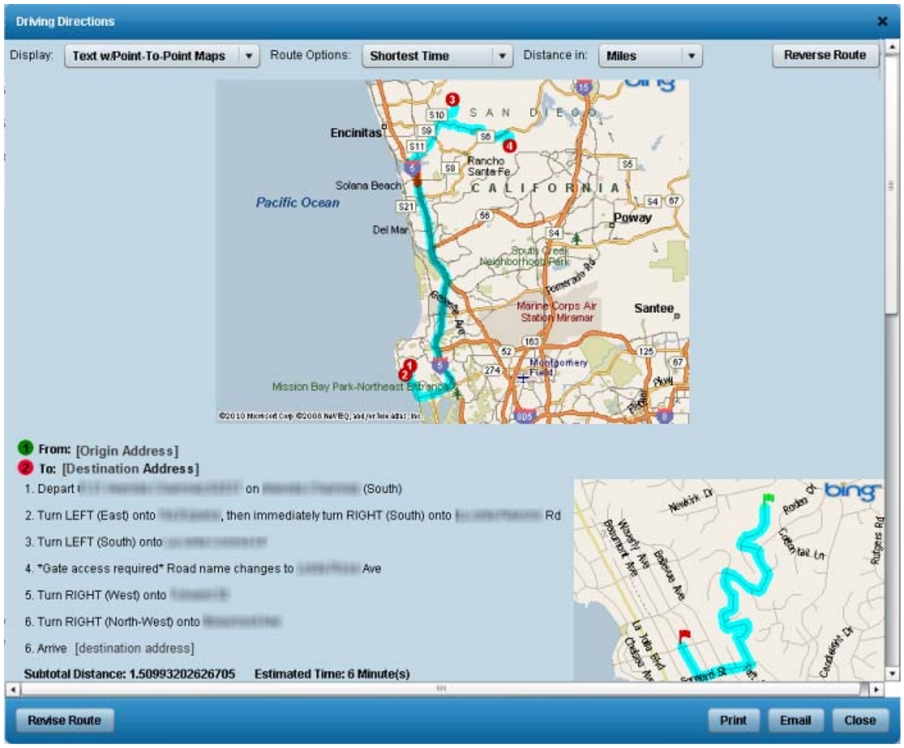
Route options determine how the driving directions are calculated and displayed.

- **Display**: how the instructions appear on the output screen (e.g., text only, text with point-to-point maps).
- **Round trip**: select this option if you want Fusion MLS to calculate round-trip directions.
- **Route**: how Fusion MLS calculates the routes between points (e.g., shortest distance, shortest time, avoid toll roads, prefer highways).
- **Distance in**: how distances are expressed (miles or kilometres).

You can set the route options from both the input and output screens.

Driving Directions Output Screen

The output screen displays driving directions between the addresses you specified on the input screen. You can also revise, print, and e-mail directions from the output screen.



Reverse Directions

▶ To reverse the order of the addresses on your route:

From the output screen, click the **Reverse Route** button.

Revising Your Route

▶ To revise your route:

From the output screen, click the **Revise Route** button to return to the input screen.

Printing Driving Directions

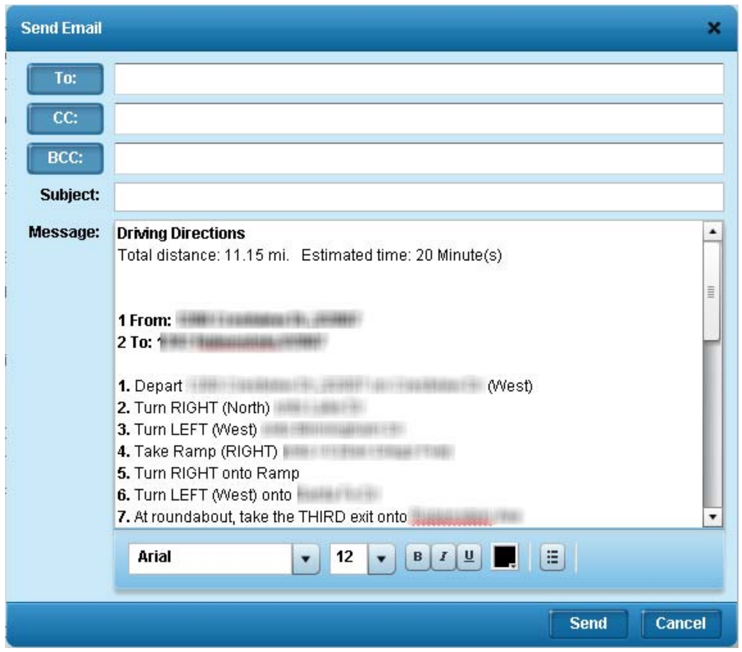
▶ To print driving directions:

1. From the output screen, click the **Print** button to open a print dialog
2. Specify your desired print settings and click the **Print** button.

E-mailing Driving Directions

▶ To e-mail driving directions:

1. From the output screen, click the **Email** button to open the Fusion MLS e-mail screen.



2. Type an e-mail address in the **To** box. Add CC and BCC addresses if desired.
3. Type a subject in the **Subject** box.
4. Edit the text if desired.
5. Click the **Send** button.

Related Topics:

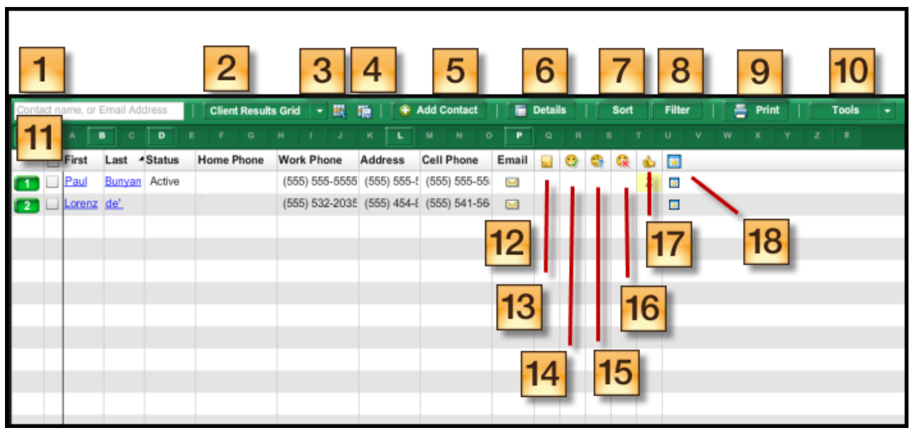
“The Text Editor” on page 19

Contact Manager

The Contact Manager

The Fusion MLS contact manager enables you to keep your contacts organized. You can add, remove, and edit contacts from this page. You can also manage your contacts' prospecting searches and contact websites from the contact manager.

Select the **Contact Manager** option from the **Contacts** menu to open the contact manager.



1. **Search box**: type a contact's name or e-mail address to narrow the contact list.
2. **Grid list**: select a display grid.
3. **Grid manager button**: click to open the grid manager.
4. **Save grid button**: click to save changes to a custom grid.
5. **Add contact button**: click to add a new contact.
6. **Contact details button**: click to open the contact details panel for the currently-selected contact.
7. **Sort button**: click to sort the contact list.
8. **Filter button**: click to filter the contact list.
9. **Print button**: click to print the contacts grid or contact reports.
10. **Tools menu**: click to perform various functions, such as deleting, e-mailing, importing, and exporting contacts.
11. **Letter bar**: click a letter to narrow the contact list to those contacts whose first or last name starts with the selected letter.
12. **Email column**: click the icon to send a message to a contact.
13. **Notes column**: displays the number of notes on the contact website.
14. **Favorites column**: displays the number of favorite listings on the contact website.

15. **Possibilities column**: indicates the number of possibilities on the contact website.
16. **Rejects column**: displays the number of rejected listings on the contact website.
17. **Recommendations column**: displays the list of recommended listings on the contact website.
18. **Contact website column**: click the icon to open the contact website.

Adding Contacts

▶ To add a new contact:

1. Open the new contact form by
   - Selecting **Add New Contact** from the **Contacts** menu.
   - Clicking the **Add Contact** button on the Contact Manager page.
2. Enter the new contact's information in the new contact form. Red labels indicate required fields.
   - The **Other Phone 1** and **Other Phone 2** fields are customizable: you can delete the label text and type your own field name.
3. Click the **Save** button.

Importing Contacts

Before you begin the import process, you must export a comma-separated value (.csv) list from your e-mail program to your computer. If you do not know how to do this, consult your e-mail program's help system.

The .csv file that you import into Fusion MLS should contain the following data, in this order:

- First Name
- Last Name
- Email
- Home Phone
- Cell Phone
- Work Phone
- Fax Phone
- Pager Phone
- Address
- City
- State

- Zip
- Work Address
- Work City
- Work State
- Work Zip

▶ To import contacts into Fusion MLS:

1. Select **Import** from the **Tools** menu to open the import contacts screen.
2. Click the **Select File** button to open a choose file dialog.
3. Select the file you want to import.
4. Click **Open** to return to the import contacts screen.
5. Select a duplicate record handling option.
6. Click the **Import** button.

Exporting Contacts

▶ To export a contact list from Fusion MLS:

1. If you only want to export certain contact records, select them before beginning the export process.
2. Select **Export** from the **Tools** menu to open the export contacts screen.
3. Select a records option:
   - Selected records
   - All records
4. Select a data format option:
   - Comma-delimited (.csv)
   - Tab-delimited (.txt)
5. If you want to compress the exported list as a .zip file, select the **Compress file** option.
6. Select the grid format that you want to export.
7. If you want the exported file to contain column headings, select the **Include Column Headers** option.
8. Click the **OK** button.
9. When prompted to open or save the file, select **Save** to open a save file dialog.
10. Select the location on your computer where to you want to save the exported list.
11. Click **Save**.

Deleting Contacts

▶ To delete contacts:

From the contact list:

1. Select the next box next to the contacts you want to delete.
2. Click the **Tools** button and select **Delete Selected**.
3. When prompted to confirm the deletion, click **OK**.

From the contact panel:

1. Click the delete button [ ].
2. When prompted to confirm the deletion, click **OK**.

Sorting the Contact List

▶ To sort the contact list:

1. Click the **Sort** button to open the sort options panel.
2. Select sort columns from the **Sort By** and **Then By** lists.
3. If necessary, click the ascending [ ] or descending [ ] buttons to change the sort direction.

Contact Search

If you have a long contact list, the contact search feature can help you locate a contact quickly.

▶ To find a contact by name or e-mail address:

Type the contact's name or e-mail address in the search box. Fusion MLS will narrow the contact list as you type.

Click the erase button [ ] to restore clear the search box and restore the complete contact list.

Filtering the Contact List

▶ To filter the contact list:

1. Click the **Filter** button to open the filter options panel.
2. Select the desired filtering options.

Alphabetical Filtering

▶ To filter the contact list alphabetically:

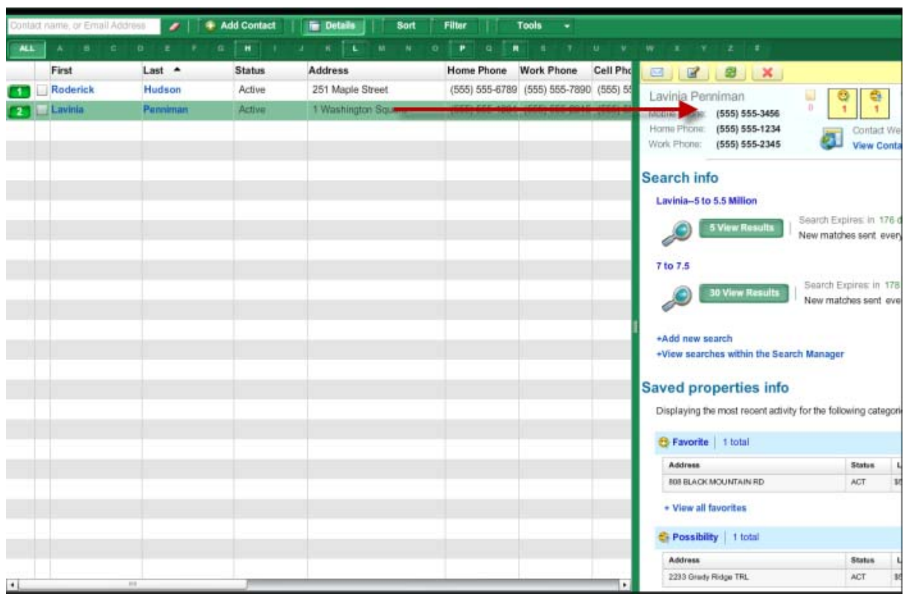
Click a letter in the letter bar. Only contacts whose first or last name begins with the selected letter will be displayed.

Click **All** to display all contacts.

The Contact Details Panel

The contact details panel enables you to see all your contact's important data at a glance: personal information, saved searches and properties, and contact website statistics.

You can attach searches to a contact, update his or her personal information, and change personal website settings from the contact details panel.



Click a contact's first or last name in the contact manager to open the contract details panel.

Expanding and Collapsing Sections

▶ To expand and collapse sections in the client details panel:

Click the expand section [ ] or collapse section [ ] button.

Editing Contact Information

▶ To edit contact information:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the contact panel, click **Update Contact Info** (in the **Personal Info** section) to open the edit contact form.
3. Make the desired changes.
4. Click **Update Changes.**

E-mailing Contacts

▶ To e-mail contacts:

From the contact list:

1. Select the next box next to the contacts you want to e-mail.
2. Click the **Tools** button and select **Email Selected** to open an e-mail form.
3. Compose the message and click **Send**.

From the contact panel:

1. Click the e-mail button [] to open an e-mail form.
2. Compose the message and click **Send**.

Viewing a Contact's Saved Properties

▶ To view a contact's saved properties:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Saved Properties Info** section, click **View All Properties** to open the saved properties screen.

To see only a specific type of saved property (e.g., favorite, possibility), click the appropriate indicator icon at the top of the panel.

Viewing Search Results from the Contact Details Panel

▶ To view all results for a saved search from the contact manager:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the Search Info section, click a search's view results button [

] to open the contact search results page.

The search results page for a saved search provides all the features of a regular search results page, plus a **Tools** menu. Select listings and choose an option from the **Tools** menu to

- Mark a listing as viewed, new, favorite, reject, etc.
- Remove a designation

Viewing a Contact's Address on a Map

▶ To view a contact address on a map:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Personal Info** section, click an address to open a map in a new window.

Contact E-mail History

The e-mail history section displays a list of the e-mails that have been sent to a contact from Fusion MLS. The **Event** column indicates whether an e-mail was sent manually or through auto-notification.

Viewing E-mail History Items

▶ To view an e-mail history item:

1. From the contact details panel, open the **Email History** section.
2. Click the link in the **Subject** column to open the read message screen.

Deleting E-mail History Items

▶ To delete an item from a contact's e-mail history:

1. From the contact details panel, open the **Email History** section.
2. Select the checkbox next to the items you want to delete.
3. When prompted to confirm the deletion, click **OK**.

Associating a Contact with an Existing Saved Search

▶ To associate a contact with an existing saved search:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Search Info** section, click **View Searches within the Search Manager** to open the search manager.
3. From the search manager, click the link in the **Active** column to open the search setting screen.
4. Select **Save changes to current search**.
5. Click the **Notification Settings** button to open the notification settings screen.
6. Select a contact from the **Link search to this contact** list.
7. Set the remaining notification options as desired.
8. Click the **Save** button.

Creating a New Saved Search for a Contact

▶ To create a new saved search for a contact:

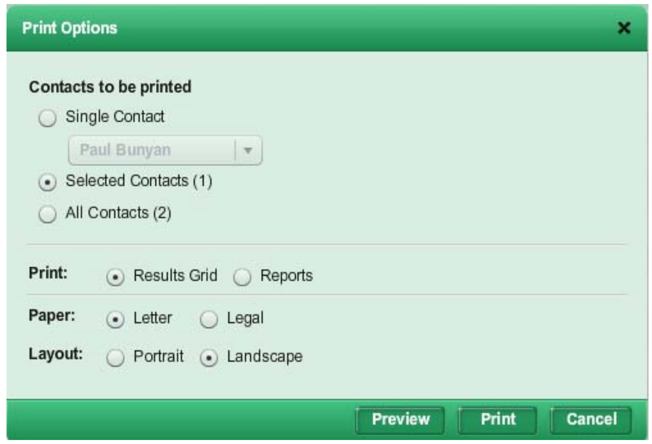
1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Search Info** section, click **Add new search** to open the search criteria page.
3. Select the desired search criteria.
4. Click **Save Search** to open the save search dialog.
5. Type a name for the search in the **Search Name** box.
6. Set the notfication options as desired.
7. Click **Save** to save the search.

Printing Contact Reports

▶ To print contact reports:

1. Click the **Print** button [

] to open the print options screen.



2. Select the **Reports** print option.
3. Select the reports to print from the **Reports to be printed** list:
   - The available reports are divided into groups. To expand or collapse the report groups, click the triangle next to the group name.
   - Select the check box next to a report name to include that report in the print job.
4. Click **Show Report Order** to expand the print options screen.
5. Reorder the reports if desired:
   5.1. Click the report you want to move and hold the left mouse button.
   5.2. Drag the report to its new position.
   5.3. Release the left mouse button.
6. If you want to collate the reports by record, rather than report type, select the **Collate reports with a**  **to print each listing on consecutive pages** check box.
   - For example, if you selected 3 records to print, and 2 reports for each, selecting this option would result in the following print order:
     - Record 1: Report 1
     - Record 1: Report 2
     - Record 2: Report 1
     - Record 2: Report 2
     - Listing3: Report 1
     - Record 3: Report 2
   - Not selecting this option would result in this print order:
     - Record 1: Report 1

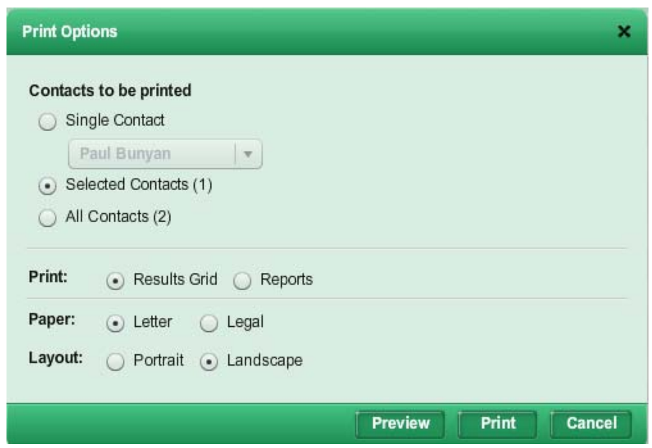
- Record 2: Report 1
- Record 3: Report 1
- Record 1: Report 2
- Record 2: Report 2
- Record 3: Report 2

7. If desired, click the **Preview** button to see a print preview.
8. Click the **Print** button to open a print dialog.
9. Select your print options.
10. Click **Print**.

Printing the Contact Manager Grid

▶ To print the contact manager grid:

1. Click the **Print** button [] to open the print options screen.



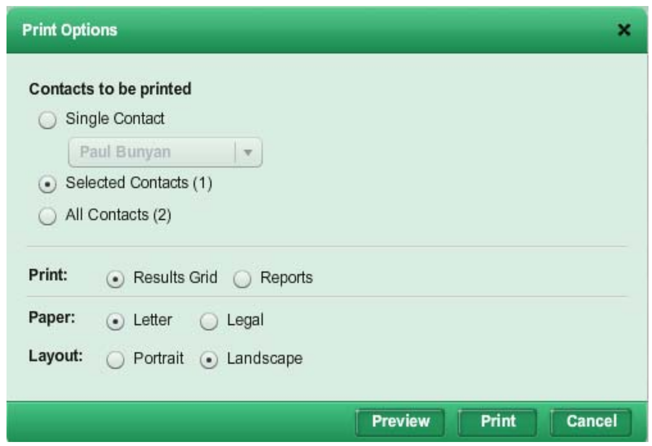
2. Select an item to print:
   - Single record. If you select this option, select the record to print from the list under the option.
   - If you have selected any records from the previous screen, the **Selected** option is available. Choose this to print the selected records.
   - All. Select this option to print all records from the previous screen.
3. Select the **Results Grid** print option.
4. Select a **Paper** option.
5. Select a **Layout** option.
6. If desired, click the **Preview** button to see a print preview.
7. Click the **Print** button to open a print dialog.

8. Select your print options.
9. Click **Print**.

Printing Envelopes from Contact Records

▶ To print envelopes for contacts:

1. Click the **Print** button [] to open the print options screen.



2. Select the **Reports** print option.
3. Select an envelope option from the reports list.
4. If desired, click the **Preview** button to see a print preview.
5. Click the **Print** button to open a print dialog.
6. Select your print options.
7. Click **Print**.

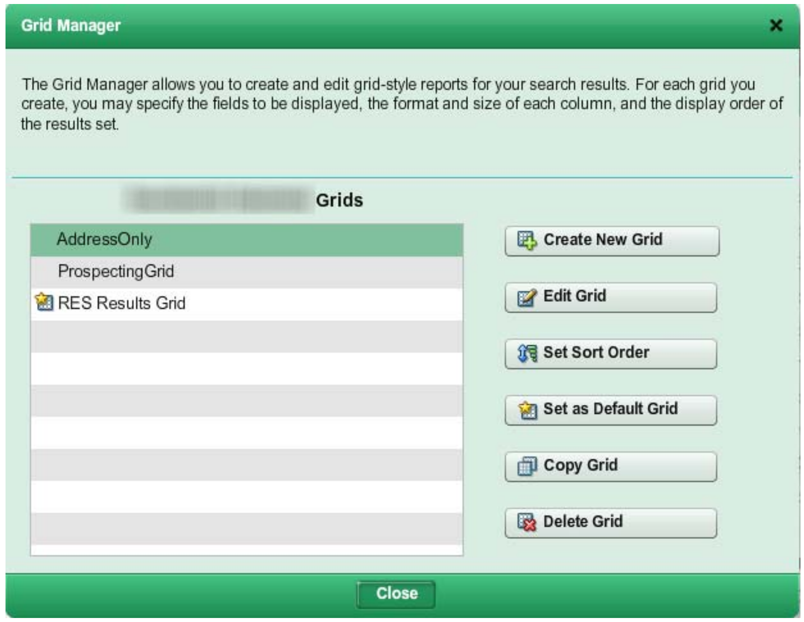
Custom Contact Display Grids

With the grid manager, you can create custom grids that display the columns you want to see, in the order you want them to appear. You can set default grids and specify the sort order for your custom grids.

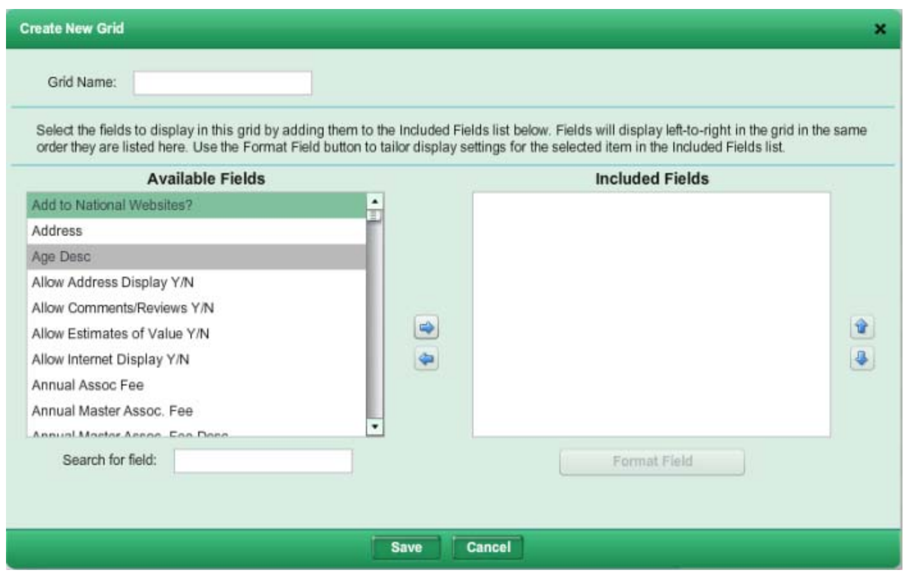
Creating a Custom Contact Manager Grid

▶ To create a new search results grid:

1. Click the grid manager icon [ ] to open the grid manager.



2. Click **Create New Grid** to open the grid editor.



3. Type a name for the grid in the **Grid Name** box.
4. Move the fields you want to appear in the grid from the **Available Fields** list to the **Included Fields** list.
   - Drag and drop fields between lists.
   - Click a field to select it, and use the move right [ ] and move left [ ] buttons to move it between lists.

• Hold down the CTRL key while clicking fields to select multiple fields.

• Hold down the Shift key to select a range of fields.

• Type a field name (or part of a field name) in the **Search for field** box to narrow the list of available fields.

5. Arrange the included fields in the order you want them to appear.

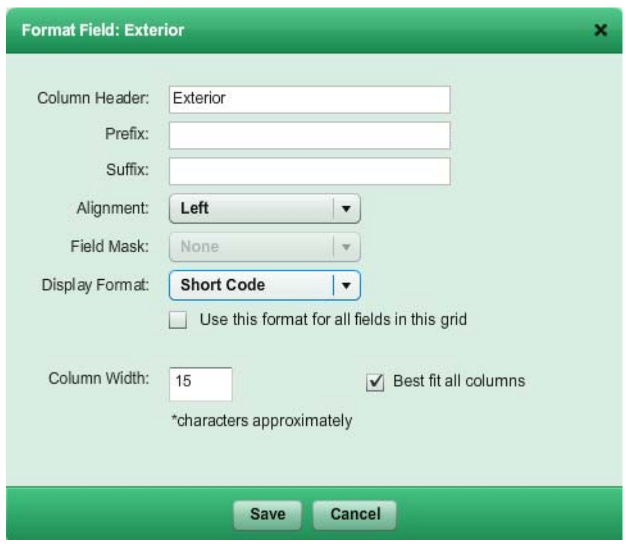
• Drag and drop fields

• Click a field to select it, and use the move up [] and move down [] buttons to move it up or down.

6. If desired, you can modify the formatting for the included fields.

6.1. Click a field to select it.

6.2. Click the **Format Field** button to open the field formatter



6.3. Modify the formatting as needed.

6.4. Click **Save** to return to the grid editor.

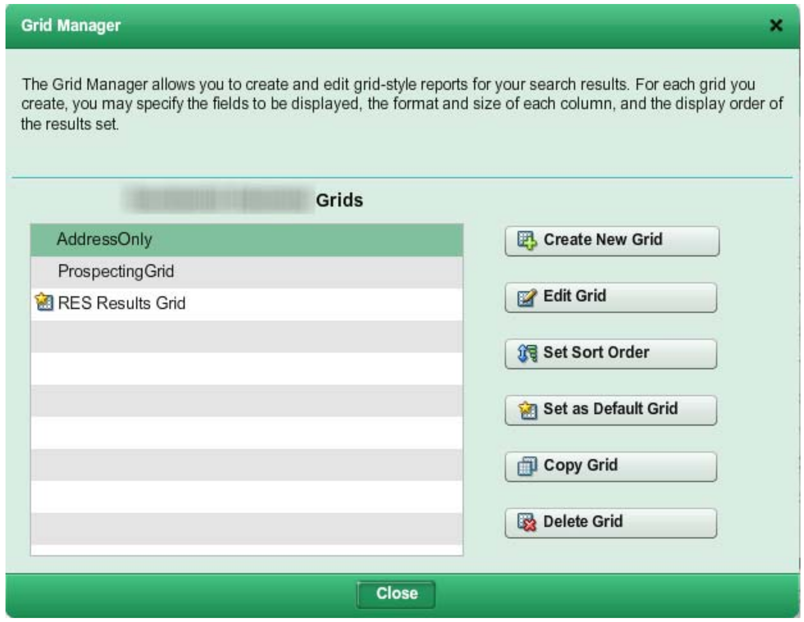
7. Click **Save**.

Copying a Contact Manager Grid

When you copy a grid, it cannot have the same name as the original.

▶ To copy a grid:

1. Click the grid manager icon [] to open the grid manager.



2. Click the grid you want to copy, to select it.
3. Click **Copy Grid** to open the grid editor.

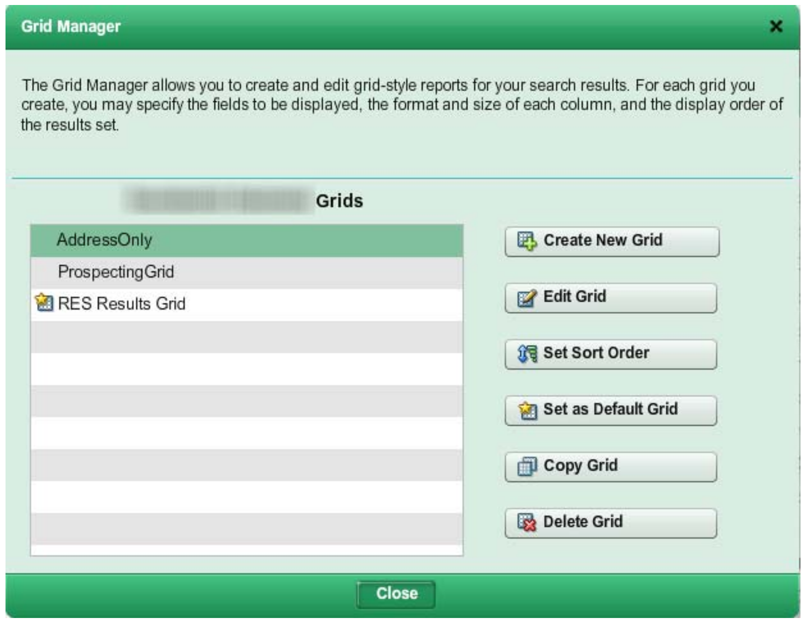
4. Type a new name in the **Grid Name** box, or accept the default.
5. Make any other desired changes.
6. Click **Save**.

Deleting a Custom Contact Manager Grid

You can delete any grid that you have created. Depending on your permission level, you may be able to delete other grids (for your office or firm) as well.

▶ To delete a grid:

1. Click the grid manager icon [] to open the grid manager.



2. Click the grid you want to delete, to select it.
3. Click **Delete Grid**.
4. When prompted to confirm the deletion, click **Yes**.

Editing a Custom Contact Manager Grid

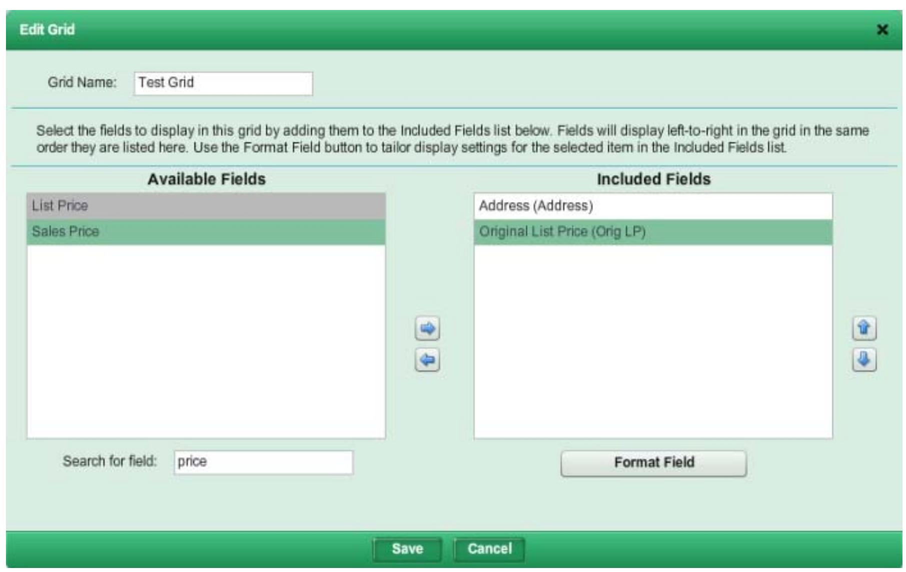
You can edit grids that you have created. Depending on your permission level, you may be able to edit other grids (for your office or firm) as well.

If you want to make changes to an office-, firm-, or system- level grid that you do not have permission to edit, make a copy of the grid and edit the copy.

▶ To edit a grid:

1. Click the grid manager icon [] to open the grid manager.

2. Click the grid you want to edit, to select it.
3. Click the **Edit Grid** button to open the grid editor.



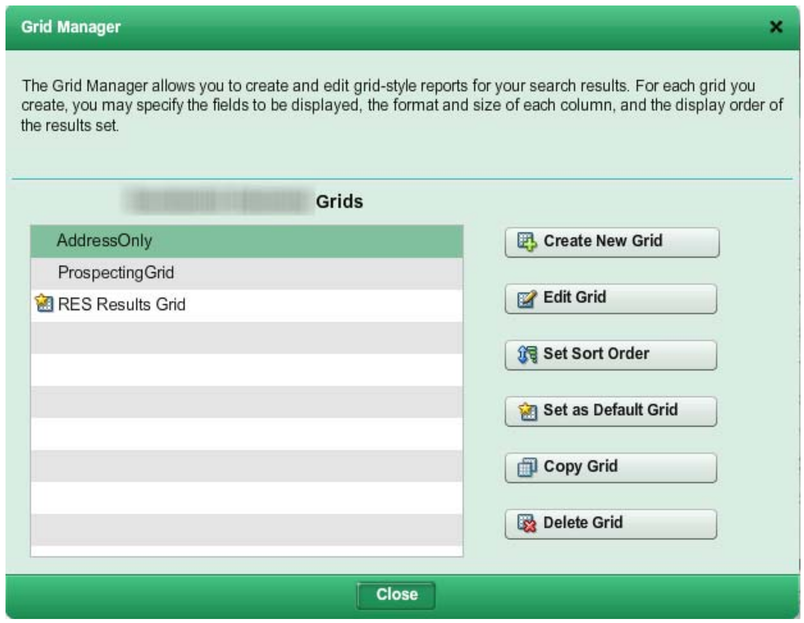
4. Make any desired changes to the grid name, included fields, or field formats.
5. Click **Save**.

Setting a Default Contact Manager Grid

The default grid is the grid that automatically loads when you open a page that uses a grid to display data, such as the search results page or the contact manager. Your current default grid is indicated by a [ ] in the grid manager.

▶ To set the default grid:

1. Click the grid manager icon [ ] to open the grid manager.



2. Click the grid you want to set as the default, to select it.
3. Click Set as **Default Grid**.

Setting the Default Contact Grid Sort Order

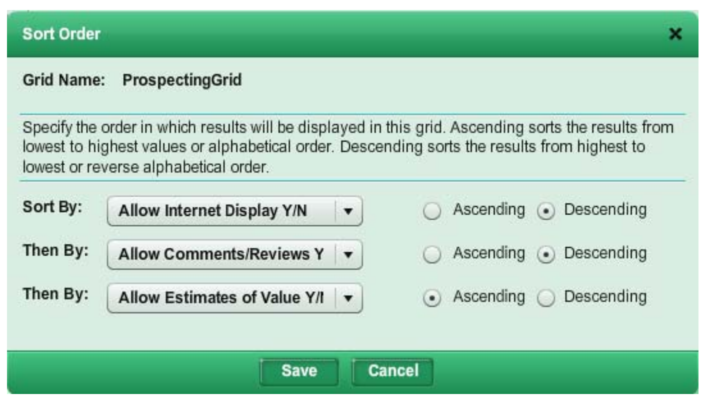
You can set the sort order for grids that you have created. Depending on your permission level, you may be able to set the sort order for other grids (for your office or firm) as well.

You can sort on up to three columns.

▶ To set the sort order for a grid:

1. Click the grid manager icon [] to open the grid manager.

2. Click the grid whose sort order you want to set, to select it.
3. Click **Set Sort Order** to open the sort order screen.



4. Select a column from the **Sort By** list.
5. Select **Ascending** or **Descending**.
6. Select additional sort fields from the **Then By** lists as needed, and set the sort direction for each.
7. Click **Save**.

Prospecting

Prospecting

Prospecting is a term applied to the act of finding listings that meet a client's needs, and then sending listing information to the client for review. Fusion MLS prospecting tools include the search manager, contact manager and contact web site.

The search manager enables you to create customized searches for a contact. You can schedule these searches to run automatically and notify your clients when a search finds listings that meet their needs.

The contact manger helps you to organize your clients and their contact information. The contact manager also provides quick access to the prospecting searches linked to a contact.

The contact web site provides a personalized web site for a contact, displaying listings that meet the criteria for the prospecting searches that you have created for the contact.

Prospect Searches

A prospect search is a saved search that you have assigned to a contact. You can schedule the search to run automatically and notify the contact of any new listings that the search returns (*auto-notification*).

Both the contact manager and search manager enable you to create, view, and edit prospect searches.

Related Topics:

- "Creating Saved Searches" on page 70
- "Creating Saved Searches from the Search Manager" on page 72
- "Associating an Existing Search with a Contact" on page 74
- "Associating a Contact with an Existing Saved Search" on page 140

Linked Listings

You can link a single listing to one or more of your contacts. Linking a listing adds it to the contact web site as a recommended property (you can change the listing's category from the linked contacts panel). This can be useful when you encounter a listing that you think will interest a client, even though it is not returned by any of the saved searches that you have set up.

You can link listings to contacts from the search results or search details page.

Linking Listings

▶ To link a listing to a contact from the search results page:

1. Move your cursor over the search result ID label [ ] to open the mini-report.
2. Click the linked contacts icon [ ] to open the linked contacts panel.
3. Select a contact from the contact list.
4. Click the **Link** button to link the listing to the contact.
5. If desired, click the icon in the **Email** column to e-mail the listing to the client.
6. If desired, click the icon in the **Notes** column to add notes or change the listing's category (e.g., favorite or recommended) on the contact web site.

▶ To link a listing to a contact from the search details page:

1. Click the **Linked Contacts** icon to open the linked contacts panel.
2. Select a contact from the contact list.
3. Click the **Link** button to link the listing to the contact.
4. If desired, click the icon in the **Email** column to e-mail the listing to the client.
5. If desired, click the icon in the **Notes** column to add notes or change the listing's category (e.g., favorite or recommended) on the contact web site.

Unlinking Listings

▶ To unlink a listing from a contact, from the search results page:

1. Move your cursor over the search result ID label [ ] to open the mini-report.
2. Click the linked contacts icon [ ] to open the linked contacts panel.
3. Click the unlink button [ ].

▶ To unlink a listing from a contact from the search details page:

1. Click the **Linked Contacts** icon to open the linked contacts panel.
2. Click the unlink button [ ].

Auto-notification

When you create a prospect search, you can schedule it to run automatically at specific times and notify your contact of any new listings that the search finds. This is called auto-notification. The e-mail notification can contain a link either to a contact web site, which displays all the listings ever matched by a prospect search, or a listing report, which only displays the most recently matched listings.

Enabling and Disabling Auto-notification for a Search

▶ To enable auto-notification:

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Select the **Turn on auto-notification for this search** check box.
4. If the search is associated with a contact, select how you want him or her to view listings:
   - Contact web site
   - E-mailed report
5. Specify the other search settings as desired.
6. Click **Save**.

▶ To disable auto-notification

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Deselect the **Turn on auto-notification for this search** check box.
4. Click **Save**.

Auto-notification Settings

The search settings screen enables you to change a search's auto-notification settings. To open the search settings screen, click the link in the **Active** column of the search manager.

Settings Tab

From the **Settings** tab, you can

- Associate a contact with the search
- Activate and deactivate auto-notification
- Set the number of days that auto-notification will be active
- Select how you want listings delivered to your contact (via website or e-mailed report)
- Edit the description of the search that appears on the client website
- Specify the default search results grid you want to use
- Set the access level for the search (firm, office, personal). This option may not be available to all users.

Frequency Tab

The **Frequency** tab enables you to specify

- How often auto-notification runs
- The conditions (e.g., price change, status change) that will cause a listing to be re-sent

Contact Email Tab

From the **Contact Email** tab, you can

- Specify additional recipients for auto-notification e-mails
- Set the text that appears in auto-notification e-mails
- Specify the report format you want the client website to use

Agent Notification Tab

The **Agent Notification** tab enables you to

- Specify if, and how, you want to receive copies of auto-notification e-mails
- The report format you want to receive

Default Auto-notification Settings

You can specify default auto-notification settings that will be applied automatically to a prospect search when you create it.

▶ To specify default auto-notification settings:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.
2. Select **Auto-Notification Defaults** to open the auto-notification default settings screen.
3. Edit the default settings as desired.
4. Click the **Save** button.

The Contact Web Site

When you set up a saved search for a contact, you can choose to send the results in a link to an online report, or a *Contact Web Site*. This is a personalized web site where a contact can view the listings returned by all the searches you have set up for him or her. Your contact can mark listings that he or she is interested in (or not interested in). Contacts can even leave notes for you about listings on the web site. You can mark listings as recommendations.

Your contact's saved listings (favorites, possibilities, rejects, and recommendations), as well as notes, are accessible from within Fusion MLS. You can view these, and all listings returned by a contact's searches, from the Search Manager and Contact Manager modules.

Global Web Site Settings

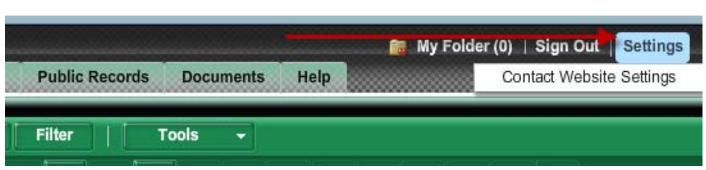
Global settings control what information is displayed on all of your contact websites, including:.

- Your contact information
- Images, like your photo and company logo
- A link to your listing inventory
- Listing addresses
- A customized site title

Contact Information

▶ To specify the contact information that appears on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.

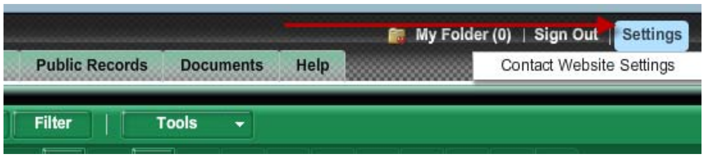


2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **My Contact Information** section, select the check boxes for the information you want to appear on your web sites.
4. Click **Save**.

Personal Photo

▶ To have your photo appear on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.

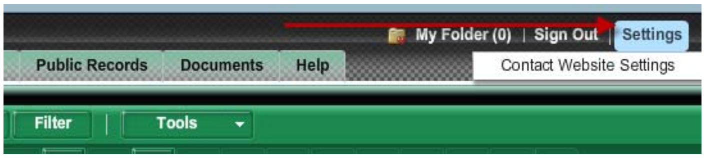


2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Images** section, select the **My Photo** check box.
4. Click **Save**.

Company Logo

▶ To have your company logo appear on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.

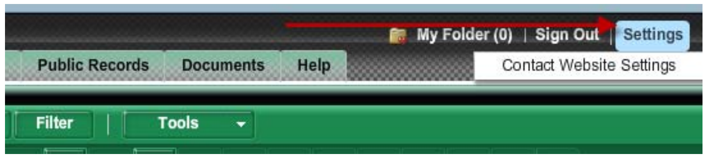


2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Images** section, select the **Company Logo** check box.
4. Click **Save**.

My Listings Link

▶ To include a "My Listings" link on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.

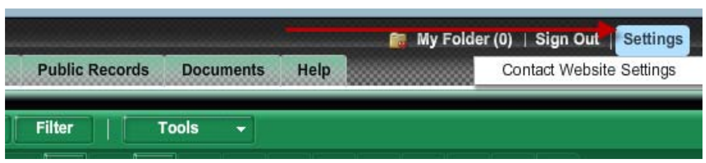


2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Additional Settings** section, select the **Show "View My Listings"** link.
4. Click **Save**.

Listing Addresses

▶ To enable listing address display and mapping on your web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.

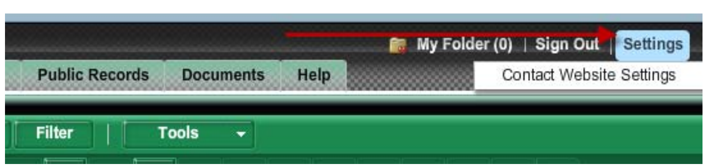


2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Additional Settings** section, select the **Show Listing Addresses** check box.
4. Click **Save**.

Adding a Custom Site Title

▶ To add a custom title for your web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.



2. Select **Contact Website Settings** to open the Contact Website Settings screen.

3. From the **Additional Settings** section, type a title in the **Site Title** box.
4. Click **Save**.

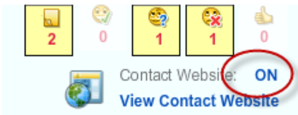
Contact-Specific Web Site Settings

Some contact web site settings apply to individual contacts. You can access these settings from the contact manager's contact details panel.

Enabling and Disabling a Contact Web Site

To enable or disable a contact web site:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. Click the web site status indicator [(**ON**/**OFF**) to toggle the web site on and off.



Forcing a Contact to Accept the Terms of Use

To force a contact to accept the site's Terms of Use:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Contact Website Info** section, click **Edit Contact Website Info** to open the settings screen.
3. Select the **FORCE** check box in the **Terms of Use** section.
4. Click **Save**.

Setting a Personalized Greeting

To set a personalized greeting for a contact site:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Contact Website Info** section, click **Edit Contact Website Info** to open the settings screen.
3. Type a greeting in the **Contact Website Greeting** box.
4. Click **Save**.

Viewing Login Settings

The login settings tell you whether a contact is required to sign in to view his or her web site, and how many times he or she has viewed the site in the last 30 days.

▶ To view a contact web site's login settings:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Contact Website Info** section, click **Edit Contact Website Info** to open the settings screen.

The login settings are displayed in the **Login Settings** section.

Viewing a Contact Web Site

You can access a contact web site from multiple points in Fusion MLS.

▶ To view a contact web site from the contact manager:

From the contact manager list:

Click the icon in the contact web site [ ] column.

From the contact panel:

Click the **View Contact Website link**.

▶ To view the contact web site from the search manager:

Click the icon in the web site [ ] column.

E-mailing a Link to a Contact Web Site

▶ To e-mail a link to a contact web site:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. Click the triangle next to the **Contact website info** section to open it.
3. Click **Email Link** to open a send e-mail screen.
4. Edit text as desired.
5. Click the **Send** button.

Managing Web Site Listings

When you enable auto-notification for a saved search, and have the results sent to a contact web site, you can review the listings on the web site from within Fusion MLS: both the contact manager and search manager provide access to a special search results page for each prospect search. This search results page enables you to

- Recommend listings
- Change a listing's designation (e.g., favorite, possibility, reject)
- Access the contact web site
- Enable or disable the contact web site

Recommending Listings

▶ To recommend a listing on the contact web site:

1. From either the search manager or contact manager, open the results page for a prospect search.
2. Select the listing you want to recommend.
3. From the **Tools** menu, select **Recommended.**

Changing a Listing's Designation

▶ To change a web site listing's designation (favorite, reject, etc.):

1. From either the search manager or contact manager, open the results page for a prospect search.
2. Select the listings whose designation you want to change.
3. Select a new designation from the **Tools** menu.

Saved Listings

Saved listings are contact web site listings that you or the contact have flagged as recommended, favorite, possiblility, or reject. You can view and manage saved listings from the contact manager's details panel.

Adding and Editing Saved Listing Notes

▶ To add a note to a saved listing:

1. From the contact manager's details panel, open the **Saved properties info** section.
2. Click the icon in the **Notes** column to open the notes screen.

3. Click the **click here to edit text** button.
4. Click the **click here to add text** button.
5. Type a note in the lower box
6. Click **Save**.
7. Click **Close**.

To edit a note to a saved listing:

1. From the contact manager's details panel, open the **Saved properties info** section.
2. Click the icon in the **Notes** column to open the notes screen.
3. Click the **click here to edit text** button.
4. Edit the text in the upper box
5. Click **Save**.
6. Click **Close**.

Changing a Saved Listing's Designation

To change a saved listing's designation (favorite, reject, etc.):

1. From the contact manager's details panel, open the **Saved properties info** section.
2. Click the icon in the **Notes** column to open the notes screen.
3. Select a designation option.
4. Click **Save**.
5. Click **Close**.

Fusion MLS Settings

Fusion MLS Settings

Global settings enable you to set time-saving defaults and customize Fusion MLS to suit your business needs. You can access Fusion MLS settings from the **Settings** link at the top of the screen; move your cursor over the link to open the settings menu.

Contact Web Site Settings

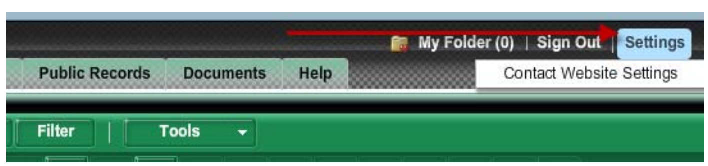
Global settings control what information is displayed on all of your contact websites, including:.

- Your contact information
- Images, like your photo and company logo
- A link to your listing inventory
- Listing addresses
- A customized site title

Contact Information

▶ To specify the contact information that appears on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.

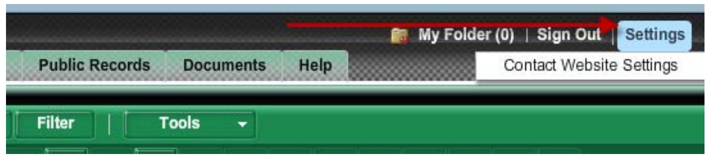


2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **My Contact Information** section, select the check boxes for the information you want to appear on your web sites.
4. Click **Save**.

Web Site Personal Photo

▶ To have your photo appear on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.

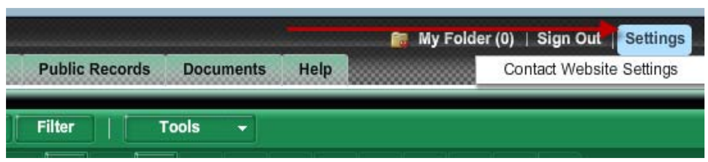


2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Images** section, select the **My Photo** check box.
4. Click **Save**.

Web Site Logo

▶ To have your company logo appear on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.

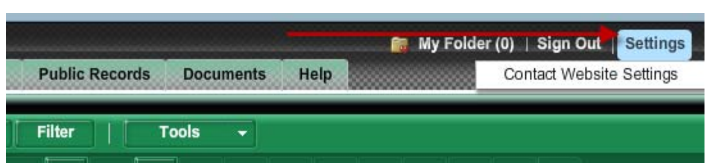


2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Images** section, select the **Company Logo** check box.
4. Click **Save**.

Link to Your Listings

▶ To include a "My Listings" link on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.



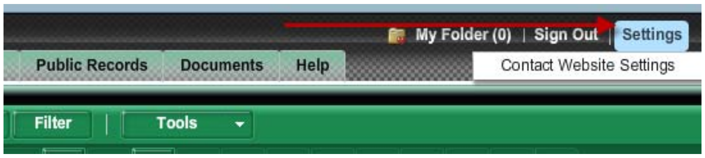
2. Select **Contact Website Settings** to open the Contact Website Settings screen.

3. From the **Additional Settings** section, select the **Show "View My Listings"** link.
4. Click **Save**.

Listing Addresses on the Web Site

▶ To enable listing address display and mapping on your web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.

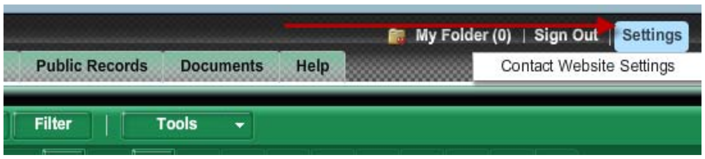


2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Additional Settings** section, select the **Show Listing Addresses** check box.
4. Click **Save**.

Custom Web Site Title

▶ To add a custom title for your web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.



2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Additional Settings** section, type a title in the **Site Title** box.
4. Click **Save**.

E-mail Prefences

Your e-mail preferences are applied by default to all e-mails sent from Fusion MLS.

Your E-mail Address

▶ To edit your primary e-mail address:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.
2. Select **Email Preferences** to open the e-mail preferences screen.
3. Make any desired changes to the **Primary email address** or **Pager/ Cellular email** settings.
4. Click the **Save** button.

Receiving Copies

▶ To receive a copy of e-mails you send from Fusion MLS:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.
2. Select **Email Preferences** to open the e-mail preferences screen.
3. Select the **Send me a copy** check box.
4. Click the **Save** button.

E-mail Signature

▶ To set your e-mail signature:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.
2. Select **Email Preferences** to open the e-mail preferences screen.
3. Compose your signature in the **Signature** box. You can format your signature with the text editor tools.
4. Click the **Save** button.

Auto-notification Defaults

You can specify default auto-notification settings that will be applied automatically to a prospect search when you create it.

▶ To specify default auto-notification settings:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.

2. Select **Auto-Notification Defaults** to open the auto-notification default settings screen.
3. Edit the default settings as desired.
4. Click the **Save** button.

Related Topics:

- "Auto-notification Settings" on page 154

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