



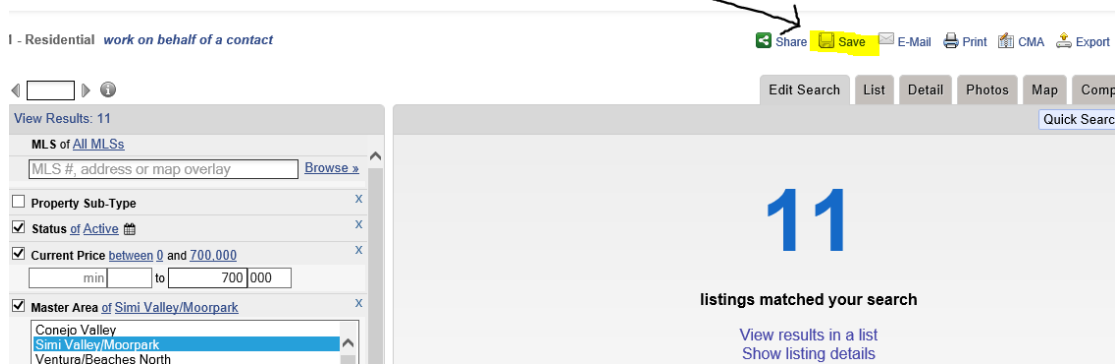
How do you do that again?

Quick & Easy, Visual Guides for Flex MLS

Basic Subscription & Portal Set-up for a New Contact

Step 1: Start by running a Search to attach to your client. *This can be any type of search (Quick Search, Map, etc.)*

Step 2: Once all your parameters have been selected click the **Save** button in the upper right of the screen



I - Residential *work on behalf of a contact*

Share Save E-Mail Print CMA Export

Edit Search List Detail Photos Map Comp

View Results: 11

MLS of All MLSs

MLS #, address or map overlay [Browse >](#)

Property Sub-Type x

Status of Active x

Current Price between 0 and 700,000 x

min to 700,000

Master Area of Simi Valley/Moorpark x

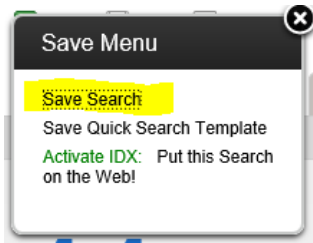
Conejo Valley
Simi Valley/Moorpark
Ventura/Beaches North

11

listings matched your search

[View results in a list](#)
[Show listing details](#)

Step 3: Next Click **Save Search**



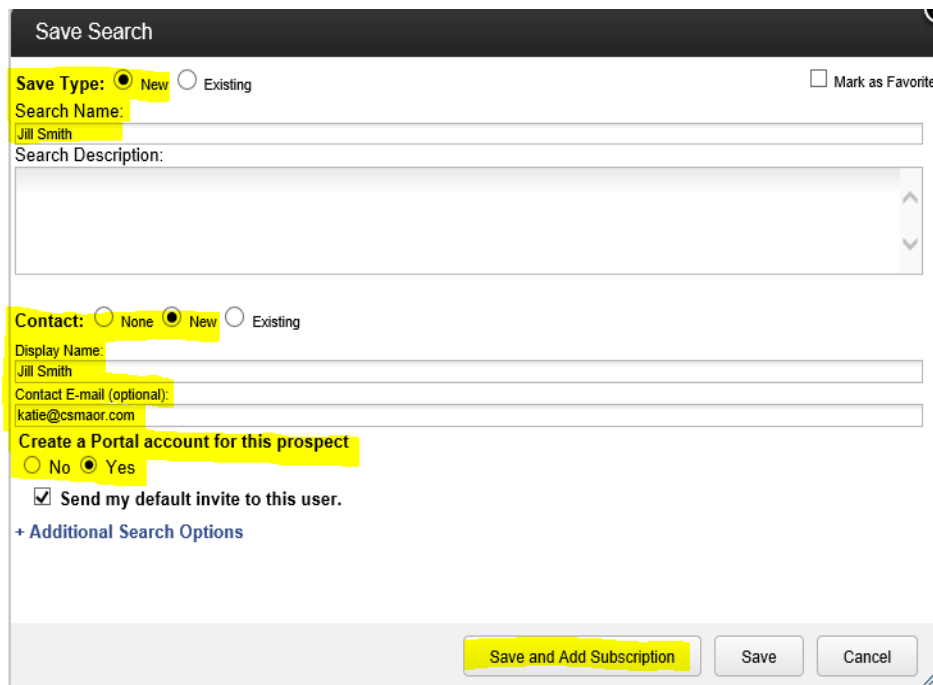
Save Menu

Save Search

Save Quick Search Template

Activate IDX: Put this Search on the Web!

Step 4: Give your search a **Name** (*please remember this will be visible to your client*), then under **Contact** select **New**. It will then ask for a display name and an email address. Lastly, if you would also like to set up a Portal Select **Yes**.....Click **Save and Add Subscription**.



Save Search

Save Type: New Existing Mark as Favorite

Search Name:
Jill Smith

Search Description:

Contact: None New Existing

Display Name:
Jill Smith

Contact E-mail (optional):
katie@csmaor.com

Create a Portal account for this prospect
 No Yes

Send my default invite to this user.

+ Additional Search Options

Save and Add Subscription Save Cancel



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Step 5: Next you are asked to set the subscription parameters. You will set how often your client will get update e-mails, what the view of the information will look like and your own personal email message. **Please note:** this e-mail message will show on every email update so please keep it generic.

And Click **Save**.

The screenshot shows the 'Add Subscription' form. At the top, there's a 'Contacts' field with 'Jill Smith' and an 'Add New Contact' button. Below that is the 'Schedule' section with radio buttons for 'Weekly', 'Monthly', and 'ASAP'. The 'Weekly' option is selected, and all days of the week are checked. The 'Monthly' option has '1st' selected. The 'View to send' section has an 'IDX View' dropdown. The 'E-mail content' section has a 'Subject' field with 'Listings' and a rich text editor with various formatting options. At the bottom right, there are 'Save' and 'Cancel' buttons.

Step 6: Lastly a green box will pop up asking you what you would like to do with the current listings you found in the search

The screenshot shows a green notification box with a checkmark icon. The text reads: "Search and subscription saved. Would you like to:". Below this are three bullet points: "Email these listings now", "Choose listings to email", and "Do not send listings now".

If you set up your contact on a Portal you may consider not sending them the listings, as all the listings can be found in their Portal. If you did not set up a Portal you would either want to send them all the listings or pick which ones you would like to send them.