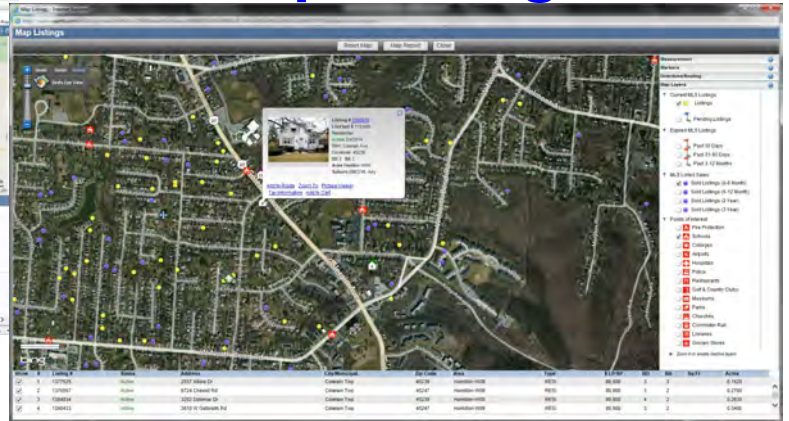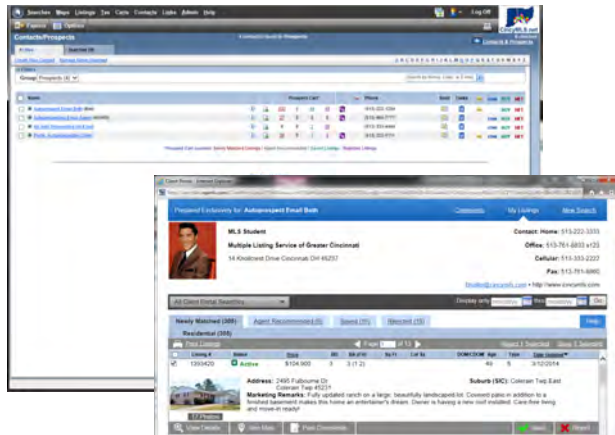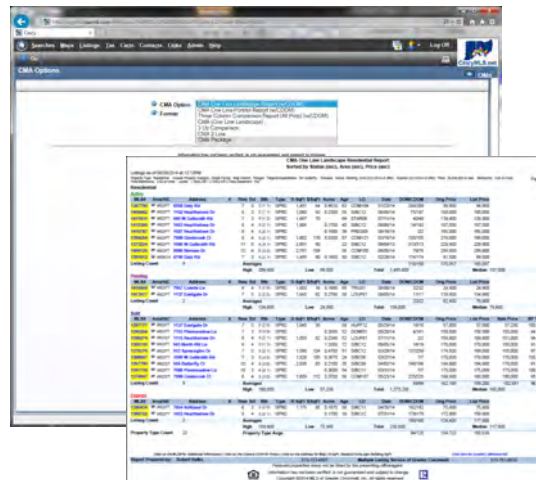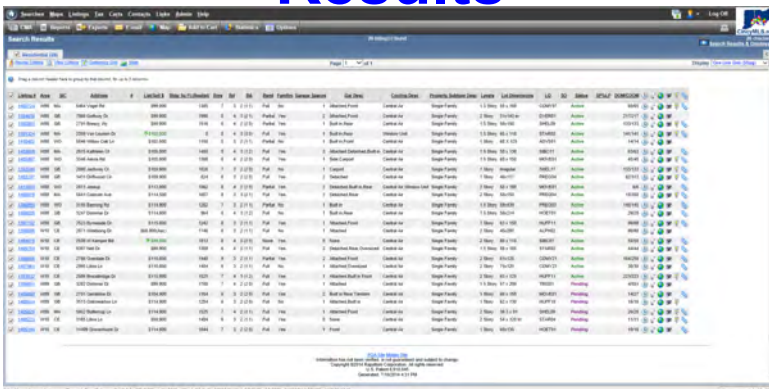# FOCUS ON:

Map Search

Map Listings

Prospects & Client Portal

CMA and CMA Package

One Line Grid Search Results

Smart Framing IDX Links

Multiple Listing Service of Greater Cincinnati, Inc.
14 Knollcrest Dr / Cincinnati, Ohio 45237

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Map Search

Click "**SEARCHES**" in the "Menu Bar." Click "**Map**."

The "Map" Search lets you search for listings based on their proximity to a particular address or location on a map. Begin by using your mouse to re-position the map and then zoom in or out to your general map location.

Alternatively/Recommended:

Use the Radius/Map Target Criteria section. *(below the map)* Enter the MLS# of an existing MLS listing or enter the complete property address that will define the center of the search. *(You must enter the Number, Street Name and Zip code of the subject property.* **Hint!** *Do not use any punctuation. Enter any valid address; the address does not have to be an MLS listing's address.)* Then specify the radius distance (for example, 1/4 mile, 1/2 mile, 1 mile, 2 miles, etc.). After you have entered all your desired criteria, click "**Recenter Map**."

Then to select the area:

To search based on a radius:
Be sure the Radius button is selected at the top of the map. Click a center point on the map, and click and drag your mouse to create circular radius areas. *(circle)* Repeat the process until you have zoomed in on the specific areas you need.

To search a rectangular area:
Be sure the Area button is selected at the top of the map. The "Area" search lets you search for listings based on "*rubber banded*" areas.

To search a Polygon area:
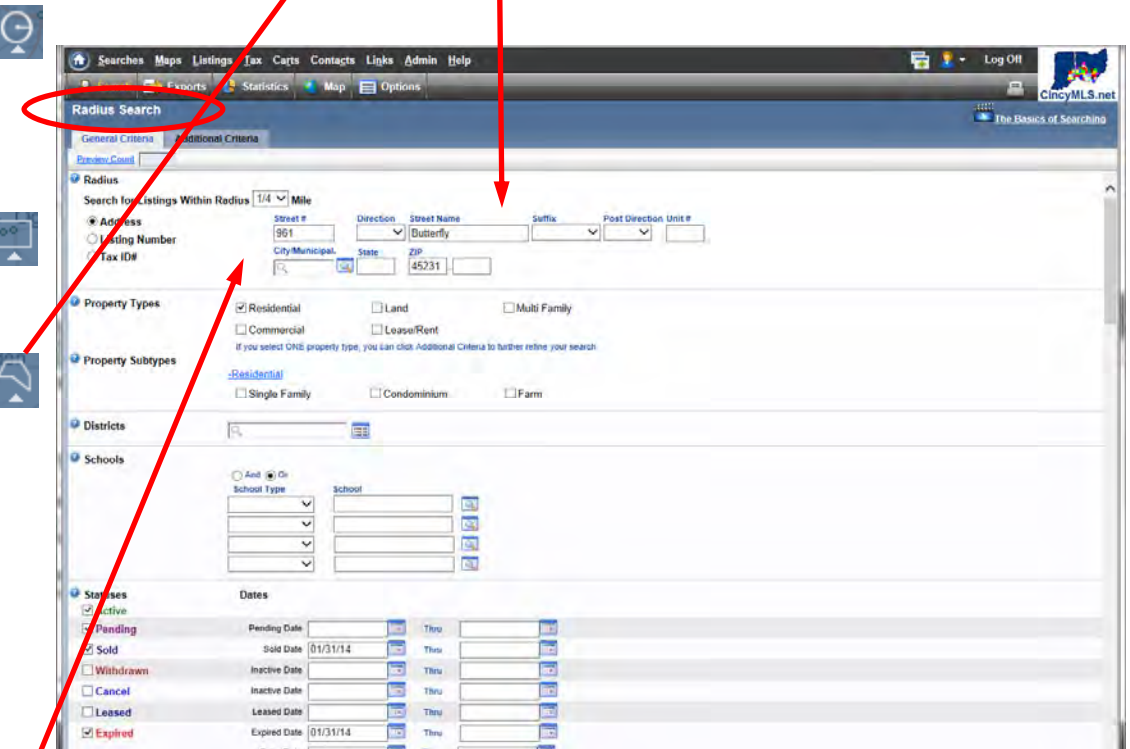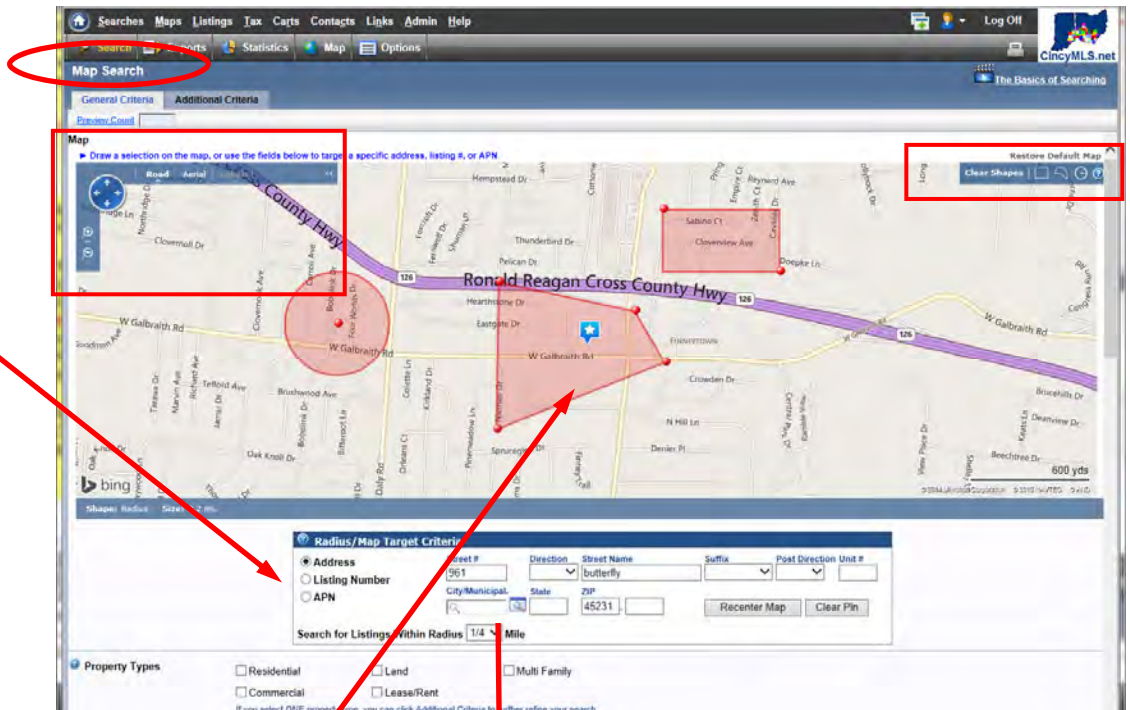*Be sure the Polygon button is selected at the top of the map.* The "Polygon" search lets you draw irregular areas with up to 10 line segments (sides).

Road, Aerial and Labels Views:
The Map Search offers three different visual options. You can now switch between viewing the standard street map, an aerial view, or a hybrid (labels) of the street map and aerial view. Just click the desired option right on the map to change views.

Radius Search

Click "**SEARCHES**" in the "Menu Bar." Click "**Radius**." The "Radius" Search lets you search for listings based on their proximity to a particular address or location on a map. Search enables you to perform a classic, text based radius search, without the map interface. *See "Alternatively" above.*

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FOCUS Series
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Note! When a listing is entered, the system verifies its address against a national postal database to obtain the "geo-codes" (*longitude and latitude*) for the property. The Map & Radius Search utilizes these geo-codes. Any address that was not recognized by the national postal database during listing input will <u>NOT</u> be able to appear in Map or Radius Search results.

Note! Use the map drawing skills above to define your "Map Search Default" in your in your 'Your Preferences." Click "**ADMIN**" in the "Menu Bar." Click "**Your Preferences**." Scroll down, define your "Map Search Default." Make your modifications. Click "**Save**" in the "Tool Bar."

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Map with Multi Properties
(250 Listing Limit)

Note! Several listings can be mapped by selecting listings ☑ and clicking on the "Tool Bar" "**Map**" button from the "Listing Results" page. *(See previous pages.)*

Hint! Click on the "Tool Bar" "**Map**" button from the search criteria page to map all the results. *(See previous pages.)*

Note! Listings can be removed form the "Map Listings" display. Simply uncheck the box next to a listing to remove it from the map.

▸ Click "**Aerial Photo**" to view an aerial photo of the neighborhood.
▸ Click "**Hybrid**" to view a combination aerial and street map.
▸ Click "**Bird's Eye View**" to zoom to near-street level multi-directional views. *(not available in all Counties)*
▸ Click "**Map Report**" to print the map page. *(what you see, is what you print!)*

Adding Map MARKERS
You can add Markers *(ICON Flags)* to the map to point out any landmark to your client.
Add a Marker – Right-click anywhere on the map and click "**Add Marker**." Select a color for the Marker, and type the text you want to display *(for example, "Library")*. The Marker displays directly on the map; the label displays on the map when you hover the mouse pointer over the Marker and prints on the "Map Report."

Remove a Marker – Click the "**Markers**" tab to begin. Click the "**X**" button ICON to the right of the Marker in the "Markers" tab. To remove all Markers on the map, click the "**Clear All**" button.

Adding Map Route Directions *(not shown)*
You can route directions to Listings, Markers, or any location on the map—including your office or home address.

Add a listing to the route – Click a listing "**ICON**" to display more information about the listing in a pop-up window. *(including thumbnail photo and Listing Detail Link)* Then, click the "**Add to Route**."

Add a marker to the route – Click a Marker "**ICON**." Then, click the "**Add to Route**" link that displays in the pop-up.

Add an address to the route – Click the "**Directions/Routing**" tab to begin. Use the field at the bottom to enter a specific address that you want included in the route. **Note!** You must enter the street number, street name and ZIP Code *(or city and state)*. Click the arrow to the right of the text field to select your home or office address. You can also select any addresses that you previously entered. To clear all previously entered addresses from the drop-down list, click "**Refresh**."

View the route – Click the "**Directions/Routing**" tab to begin. Click the "**Display Routing Map**" check box to view the recommended driving route in a small window. To expand the window, click the "**double-arrow ICON**" in the bottom left corner of the inset routing map.
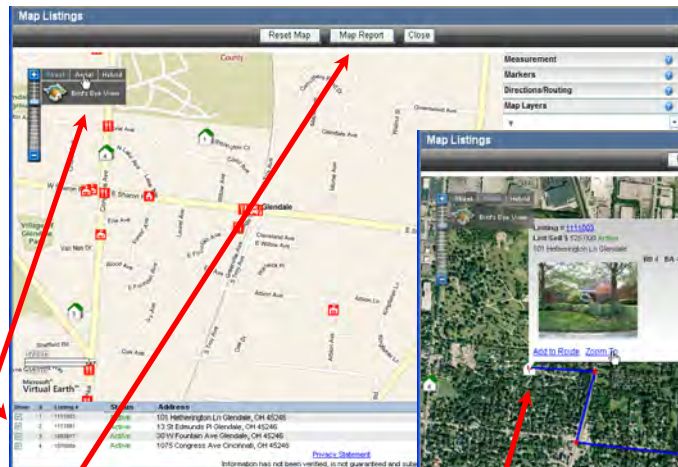
Reorder stops – Click the "**Directions/Routing**" tab to begin. Simply drag and drop stops in the to change the order.

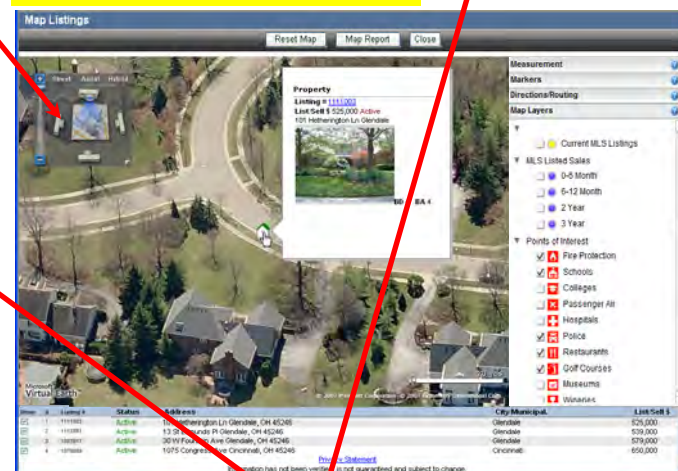**Remove stops** – Click the "**Directions/Routing**" tab to begin. Click the "**X**" next to a stop to remove it from the route.

Note! **Impressive** quick zoom in on a listing! Click anywhere on a listing's row in the results list below the map. The map will zoom out then in on the subject listing! **Very cool.**

Adding Map Measurements
You can measure any distance on the map in feet or miles. You can even take measurements on multiple segments, and the software automatically displays the total of all segments. Click the "**Measurement**" tab to begin.

Adding Map Layers
You can layer a variety of items on the map. Click the "**Map Layers**" tab to begin.

Note! Some options are not enabled until the map is zoomed in enough to display the information legibly.

Mapped Listings Report

Markers

🚩 **I275 Interchange**

#	MLS #	Status	Address	City/Municipal.	List/Sell $
1	1086924	Active	2526 Arroka Dr Colerain Twp, OH 45231	Colerain Twp	104,900
2	1091115	Active	10244 Tottenham Dr Colerain Twp, OH 45231	Colerain Twp	119,900
3	1087636	Active	12108 Birchgrove Ct Colerain Twp, OH 45251	Colerain Twp	147,000
4	1081626	Active	11584 Greenridge Dr Colerain Twp, OH 45251	Colerain Twp	185,000

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No Map?
Map Pin Placement

Note! When submitting a new listing, there may be times when the system cannot validate the listing's address. Without a valid, physical address, your listing will not be mapped (no map link) and cannot be found using the Radius or Map search. You can use the "Map Pin Placement" feature to specify a map location for your listing, and enable agents to access your listing through a Radius or Map search.

▶ **The "Map Pin Placement" link will only be available if the system cannot validate the listing's address.**

▶ **The "Map Pin Placement" link will only be available one time to specify a map location—then disappear.**

▶ **If you need to make an additional adjustment or adjust an existing "Map Pin Placement" please call CincyMLS for assistance. (761-8833)**

To add a "Map Pin Placement" to your listing, from the "Menu Bar" page click "**LISTINGS**," from the "Listings" menu click "**View/Revise Your Listings**" (or click "**Quick Change**"). From the "Revise Listing" page, click "**Map Pin Placement**". *(see page 19 for more information)*

The recommended steps:
1) The map will default to the "**Aerial**" view. Select "**Road**" view if preferred.
2) Zoom <u>out</u> until you see the approximate location (city/municipality) of the listing. "**Drag and Drop**" the Pin ICON to the general vicinity of the listing. **Hint!** *(do not loose sight of the Pin ICON)*
3) Zoom in until you see the map's details. **Hint!** *(do not loose sight of the Pin ICON)*
4) "**Drag and Drop**" the Pin ICON to the subject property—or "best guess" location.
5) Remember, new or newer construction and vacant land listings may be difficult to pin. The street may not even display on the map. Pin the ICON to the nearest, best guess location so that the listing will have a map and result from the radius and map searches.
6) Click "**Restore Pin Location**" to start over.
7) Click "**Save**" to add the "Map Pin Placement" to the listing!
8) ***Note!* Call CincyMLS for further assistance and adjustments.**
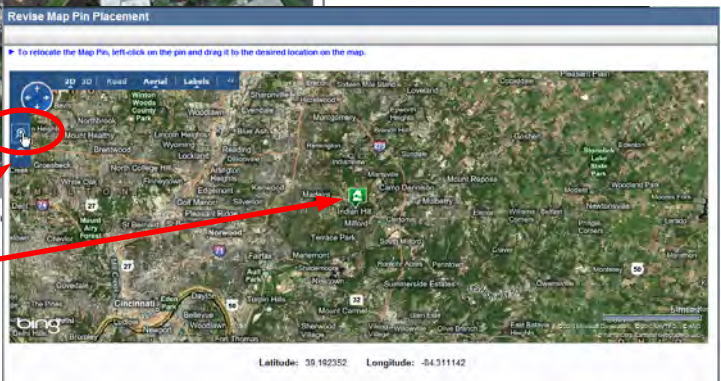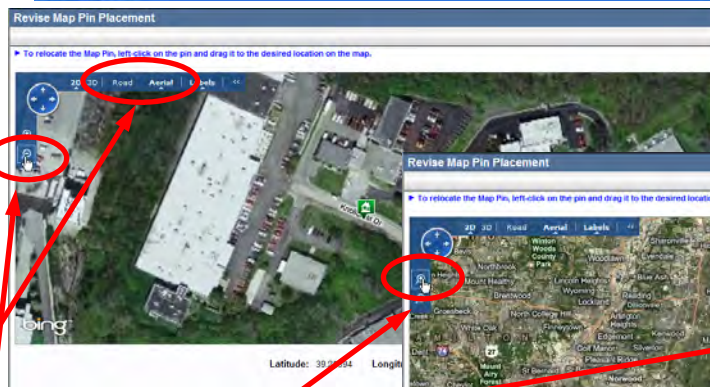
Address Search

Click "**SEARCHES**" in the "Menu Bar," then click on "**Address**." *(not shown)*

The "Address Search" lets you search for listings based on partial or complete address information. There is one set of address fields on the main search page; to enter multiple addresses *(up to 10)*, click the "**Additional Addresses**" link.

Note! You must enter a value in at least one of the Street Number or Street Name fields. *(All other input criteria is optional!)* After you have entered all your desired criteria, click "**Search**" to go directly to your search results.

Note! Search Address is similar to the "Standard Search" with the modification of Address input.

Entering Street Number(s): If you are searching for a specific house/street number, type the number in the "*Street #*" criteria only. To search for a range of numbers, enter the beginning value in the Street # field, and the ending value in the "*Street # Thru*" criteria.

Entering the Street Name: Click "**Exact**" if you want to match the street name exactly as you typed it. *(not recommended)* Click "**Contains**" if you want to include all streets that contain what you typed. *("Begins with" is the default)*

Hint! *(Hint)* Do not use any punctuation; do not enter a "Direction", "Suffix" or "Post Direction".

Note! See "Standard Search" for more information.

Hint! Alternatively, use the "**Home**" page "**Listing Locator**" module to quickly search by Listing #(s) or by Address.

Point and click on an MLS# to display the Listing Detail Page.

Point and click on the "Find Comparables" toolbar button to begin the CMA process.

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Find Comparables

You can quickly search for comparable listings from any "**Listing Detail**" page with just one click of the "**Find Comparables**" button. *(see previous page)* This feature automatically runs a radius search against the selected listing's address using default criteria adjustments which can be easily modified using the new "**Find Comparables Set-up**" feature.

The selected subject property will automatically be highlighted at the top of the "**Find Comparables– Results**" page and you can even run a "**CMA Package**" that will automatically pull the subject property's data.

The Results - One Line Grid

Hint! The "**Find Comparables—Results**" page will always display using the default "**One Line Grid**" display—regardless of your default display selection.

Hint! If you want to add or change the default "**Find Comparables**" search criteria on-the-fly, click "**Revise Criteria**" in the "Find Comparables—Results" "link bar."

The "**Find Comparables Set-up**" for the default radius search criteria can be modified, but only to a limited degree. You must use the "**Revise Criteria**" link to customize the search criteria for each Comparable search. **Hint!** Rapattoni is planning on changing the default search from the "Radius" to the "**Map**" search so that you can refine the search area to a greater degree. *(see next page)*

Hint! Use the horizontal scroll bars to examine the "**Find Comparables—Results**" in the "**One Line Grid**" display.

Hint! A wide-screen monitor is a definite plus for "**One Line Grid**" display—to minimize or eliminate scrolling left and right.

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CMA & CMA Package

Note! The Rapattoni MLS system offers four CMA options:

CMA (One Line Landscape)
CMA (One Line Portrait)
Four/Six Column Comparison
CMA 2 Line
CMA Package

The "**CMA Package**" enables you to compare a subject property to any number of listings you select as comparable, and adjust for individual features of each comparable property in order to produce a more accurate analysis. A "*wizard*" leads you step by step through creating a CMA package, including: selecting the client's name from your contact list; specifying which fields to use for comparison and their order *(or using the default setup);* making adjustments on each comparable property, as needed; choosing which elements you want to include in your presentation package; and then printing or e-mailing your package. You can include your agent resume, company profile, a customized cover letter, enhanced reports, and more .... The system automatically saves the CMA as part of your contact's record, so you can access it or adjust and reprint it in the future.

Creating the CMA Package is a 6 step process:

To begin, click the "**CMA**" button found in the "**Tool-bar**" of the "**Find Comparables Results**" or "**Search Results**" page. From the "**CMA Options**" page, pull-down the "**CMA Option**" list. Click on "**CMA Package**." Click "**Go**"

1) Select Contact. Click on the "select from" icon if you want to view and select from all of your contacts. Click "**Create New Contact**" to setup a new contact for the CMA Package.

Note! You must select or create a new contact to go to the next step.

After the contact is selected or created, click the "**Next Step**" link to proceed.
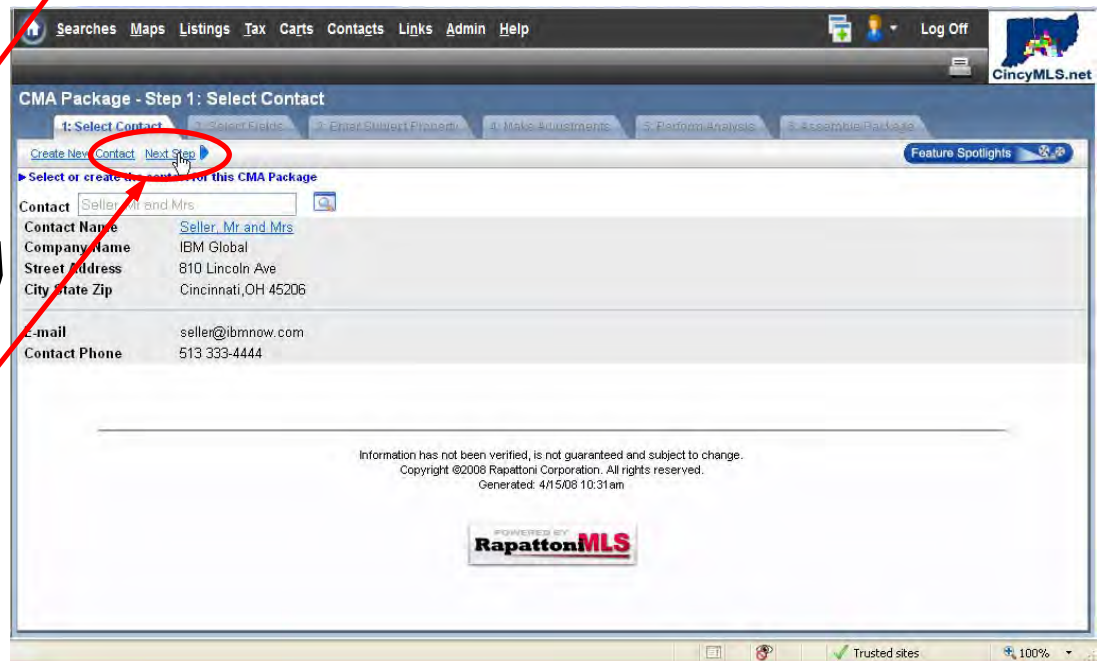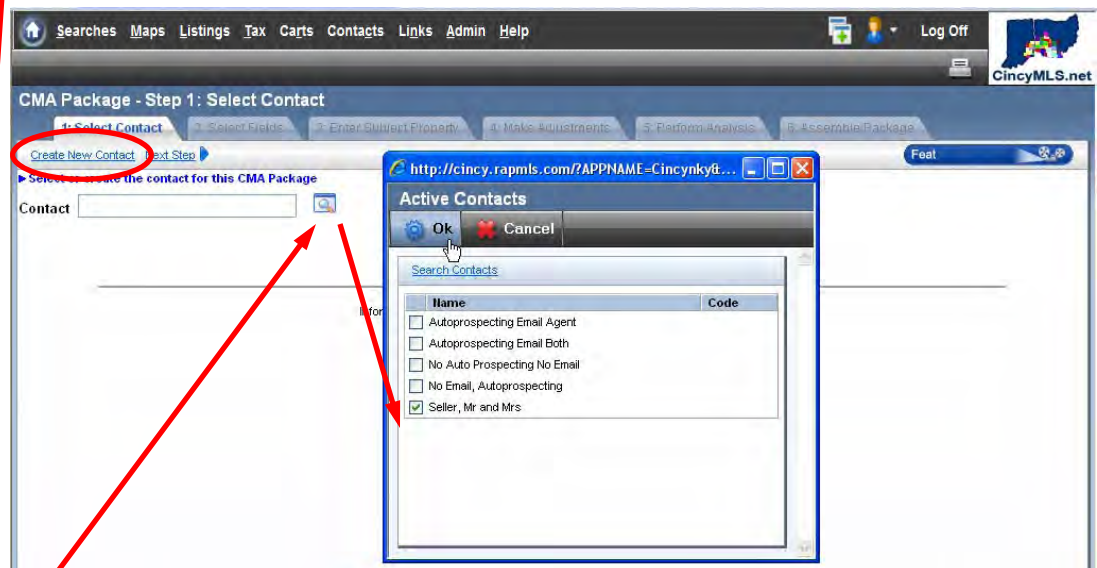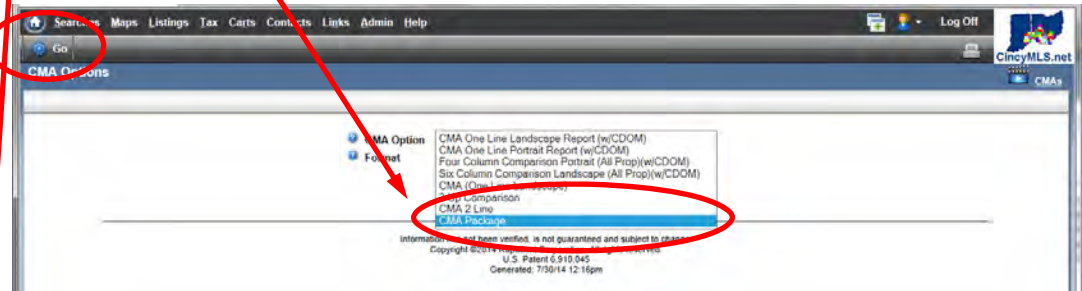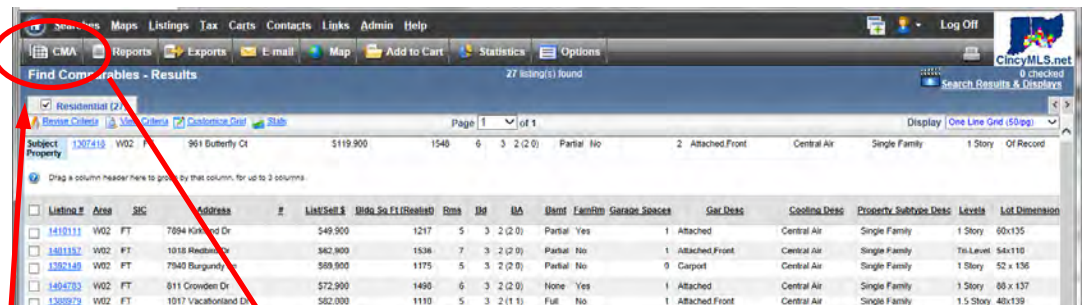
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2) Select Fields. Specify which fields to use for comparison and their order *(or use the default setup).*

To add fields to your CMA:

1. Using the left-hand window of available fields, highlight one or more fields you want to add to your CMA report. *Hint! You can hold down the Ctrl key to select multiple fields.*

2. Click "**Add**" to move them to the right-hand window of selected fields.

To remove fields :

1. In the right-hand "Selected Fields" window, highlight the field(s) you want to remove from your CMA report.

2. Click " **Remove**" to move them out of the Selected Fields list.

To add a custom field:

1. Click "**Add Custom**"

2. Type a label for your custom field, then click "**OK**." The software adds the new field label to the right-hand window, beneath whichever field was highlighted.

To change the field order:

1. To change the order fields display on your CMA report, in the right-hand Selected Fields window, highlight a field you want to move.

2. Use the "**Move Up**" or "**Move Down**" button to move the field up or down in the list.

3. Repeat steps 1–2 until the fields display in the desired order.

When finished, click the "**Next Step**" link to continue.

Note! Use the "Add Custom" button to create a custom field.

Note! If you create a custom field, you will have to manually enter the data during the "Make Adjustments" step.

Note! It is recommended that you included the source of the custom information in either the label or data that is entered.

Default Data
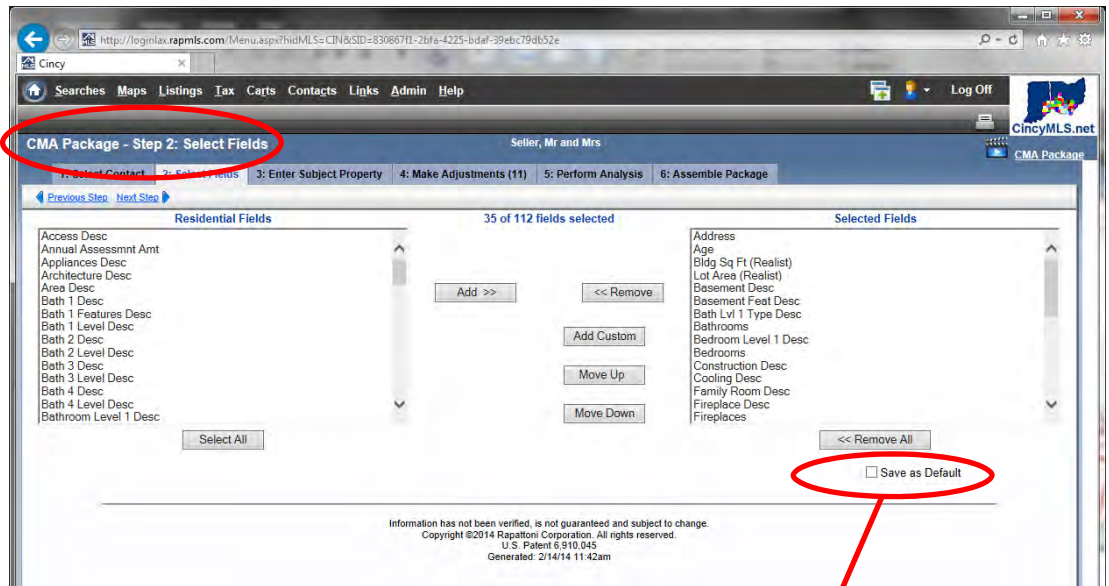
Hint! Check-off "**Save as Default**" to set the current configuration as your "CMA Default Fields." Alternatively, click **ADMIN** in the "Menu Bar," then click "**CMA Default Field Setup**" to customize your "CMA Default Fields."

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3) Enter Subject Property: If you use the "**Listing Detail**" page "**Find Comparables**" toolbar button, the Subject Property data will be automatically be filled in with the Subject Property information.

If did not use this option, you will have to manually enter the information. If the *subject* property is an existing listing in the MLS, type the listing number in the Listing # box and click "**Get Info**."

If the subject property is NOT an MLS listing, skip the Listing # field and manually enter the property information in the appropriate boxes. You can even upload you own picture for the non-MLS subject property.

Hint! Either take your own digital picture, or if the property is in Hamilton County, you could use the Auditor's web site picture. *Check with your Broker if you are considering these options.*

Note! You do not have to complete every field. When the property information is complete, click the "**Next Step**" link.

4) Make Adjustments: The next page displays a columnar format showing the subject property on the left, next to the comparable properties. You may adjust the value of a comparable by entering a positive (i. e. 1200) or negative (i. e. –1200) amount next to a particular field of information. This would increase or reduce the Adjusted Value for the comparable property, giving a more accurate comparison with the subject property. *Check with your Broker if you are considering these options.*

Click the "**Next Listing**" link to move to the next comparable listing or use the pull-down "**Listing #**" combo-box to click and select a *MLS# & Address*. Click "**Go**" to jump to the selected comparable listing.

When you have made all necessary adjustments to the comparable properties, click on "**Next Step**" to proceed..

5) Perform Analysis: The CMA Package "*wizard*" provides several options on this page. Click the "**Update**" button in the "Tool Bar" after modifying an option to "refresh" the page.

Use the "Sort" boxes to list the comparable listings in a preferred order.

Click on the "**Revise**" link to further adjust the comparable listing's price.

Click on the "**Delete**" link to remove a listing from the analysis.

You can manually "*Add another comparable listing*" to the analysis by entering the "Listing #" in the "Listing #" box and then click "**Add**."

Note! Enter the suggested market value exactly as you would like it to appear - the software does not reformat your text. Enter the value as a "*Suggested Price or Range*."

When you have made all necessary adjustments, click on "**Next Step**" to proceed.

6) Assemble Package:

Note! Customized CMA Documents Can be Set Up! The "ADMIN" menu contains links called "**CMA Document Setup**" and "**CMA Default Field Setup**." From here, you can create your own customized cover letter and agent resume, as well as an office resume *(if authorized),* which will be the default versions for creating CMA Packages. Once these default documents are set up, you can include them as part of your CMA Packages, and change them on-the-fly as needed for individual clients.

The CMA Package "*wizard*" provides several options on this page. Click the "**Update**" button in the "Tool Bar" after modifying an option to "refresh" the page.

Use the "*Include*" check-off ☑ boxes to select the modules to be included in this "CMA Package."

Use the "*Sort*" boxes set the order of the modules.

Screenshot 1 — CMA Package - Step 5: Perform Analysis

Searches Maps Listings Tax Carts Contacts Links Admin Help Log Off

Update

CMA Package - Step 5: Perform Analysis   Mr and Mrs Seller   CMA Package

1: Select Contact | 2: Select Fields | 3: Enter Subject Property | 4: Make Adjustments (6) | 5: Perform Analysis | 6: Assemble Package

Previous Step Next Step

▶ Review the comparable listings and enter a suggested price or price range for the subject property

Sort	Listing #	Address	Status	Price	Adjustments	Adjusted Price		
10	1371009	873 W Galbraith Rd	Active	33,000		33,000	Revise	Delete
20	1359215	981 Thunderbird Dr	Sold	78,000		78,000	Revise	Delete
30	1319228	8246 Springdew Dr	Sold	80,000		80,000	Revise	Delete
40	1333822	1051 W Galbraith Rd	Sold	119,000		119,000	Revise	Delete
50	1330232	866 W Galbraith Rd	Expired	70,000		70,000	Revise	Delete
60	1335573	1013 Pelican Dr	Expired	109,000		109,900	Revise	Delete

Suggested Price or Range: $75,000 thru $85,000
High Adjusted Price: 119,000   Average Adjusted Price: 81,650
Low Adjusted Price: 33,000   Median Adjusted Price: 79,000

Add another comparable listing:
Listing # [   ] Add

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U.S. Patent 6,910,045
Generated: 2/17/14 11:41am

Screenshot 2 — CMA Package - Step 6: Assemble Package

Searches Maps Listings Tax Carts Contacts Links Admin Help Log Off

Update   E-mail   Print Preview

CMA Package - Step 6: Assemble Package   Seller, Mr and Mrs   CMA Package

1: Select Contact | 2: Select Fields | 3: Enter Subject Property | 4: Make Adjustments (6) | 5: Perform Analysis | 6: Assemble Package

Previous Step

Include	Sort	Document/Report				
☑	10	Listing Presentation Cover Page				
☑	20	Cover Letter	Elegant	Preview	Print	Revise
☑	30	Subject Property Comparison		Preview	Print	
☑	40	CMA Report		Preview	Print	
☑	60	Statistics		Preview	Print	
☑	70	Map		Preview	Print	
☑	80	Agent Resume	Elegant	Preview	Print	Revise
☑	90	Office Resume	Elegant	Preview	Print	
☑	100	Seller's Net Sheet		Preview	Print	Create

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U.S. Patent 6,910,045
Generated: 2/17/14 11:48am

Finally:

Click "**Preview**" to view an *individual* document; click "**Print**" to print an *individual* document.

Click "**Revise**" to customize the "Cover Letter" or "Agent Resume" for this CMA.

Click "**Create**" to create a "Seller's Net Sheet" for this CMA Package.

Click the "**Print Preview**" "Tool Bar" button to print the CMA Package; click the "**E-mail**" "Tool Bar" button to send the CMA Package via e-mail.

Optionally, click on the "**Previous Step**" link to go back to the previous step or click on a "**tab**" to "*jump*" to a specific CMA step.

Note! Remember! The system automatically saves the CMA as part of your contact's record, so you can access it or adjust and reprint it in the future. Click "CMA" in the "Contacts/Prospects" list. **See next page for sample CMA Package.**

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Cover Page

Cover Letter

Office Resume

Agent Resume

Subject Comparison Report

One-Line CMA Report

Statistics

Map

Estimated Net Proceeds

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Prospects

Setting up a prospect is a 5 step process:

1) Interview your Prospect to determine their search criteria.

2) Use "Standard Search" *(or the Search of your choice)* to enter their criteria. From the *expanded* "**Options**" pane, "Save Options," click in the "**Save as a New Prospect**" typing box. Enter your Prospect's name. *(No one else has access to your prospect information, providing you do NOT disclose your logon information.)* Click "**Save**." The "Modify Contact Information" page will be displayed. **- OR -** To save the search for an existing prospect, select a "Prospect" from the "**Add Search to Existing Prospect**" pull-down selector list, click "**Save**".

Note! You can "**Save as a New Prospect**" from the "**Options**" window, *from either the "Search Criteria" page or the "Search Results" page.* **Hint!** If you "**Save as a New Prospect**" from the "Search Results" page, *it is recommended that all results are "checked."*

3) Enter the Prospect's information:

If you want the system to automatically add listings that match the prospect's search criteria into their cart, check off ☑ "Auto-Prospecting."

If you would like the system to send you an e-mail message when a listing matches the prospect's criteria, change "*Send E-mail to Agent*" to "**Yes**."

If you would also like the system to send e-mail notification to your prospect, change "*Send E-mail to Prospect*" to "**Yes**."

Note! Alternatively, you can check-off the "**Client Portal**." The "**Client Portal**" enables you to provide your clients with an interactive view of their own prospect cart in a personalized Webpage from their e-mail messages. **Hint!** Click "**Save**" in the Tool Bar to enable the "**Preview**" and "**E-mail Client Portal Invitation**" links.

From the "Portal" Clients can:

▸ See all of the listings in their "**Newly Matched**," "Agent Recommended," "**Saved**" and "**Rejected**" tabs, and can even save and reject listings themselves!

▸ Leave comments for you regarding a specific listing in their cart. *(You can leave comments about a specific listing for your Client as well.)*

▸ Setup their own Searches!

Click "**Save**" to go to Step 4.
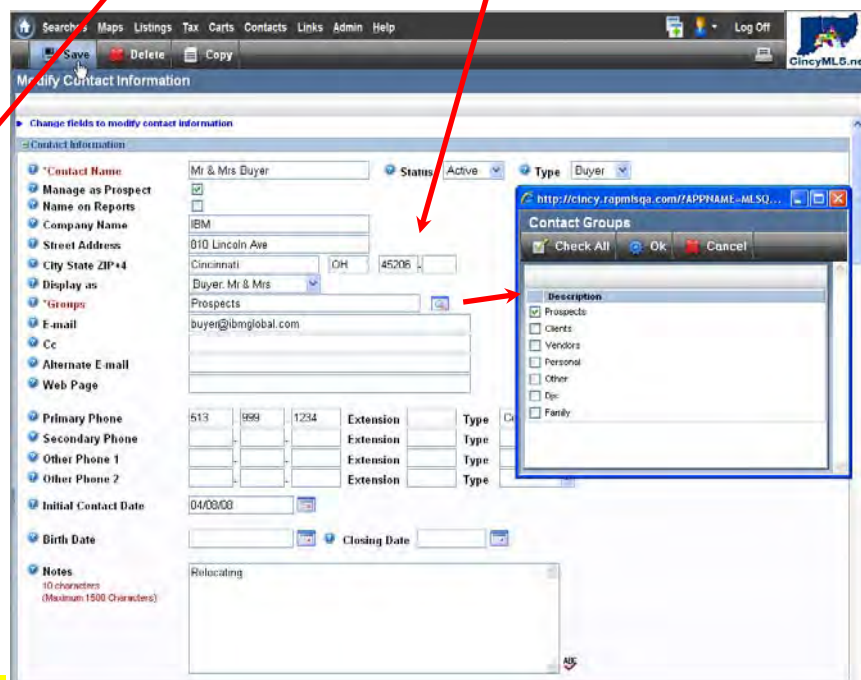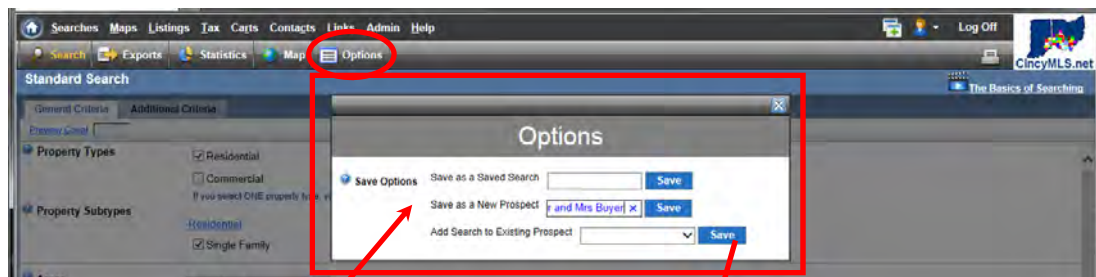
Traditional E-mail Method

Client Portal Method
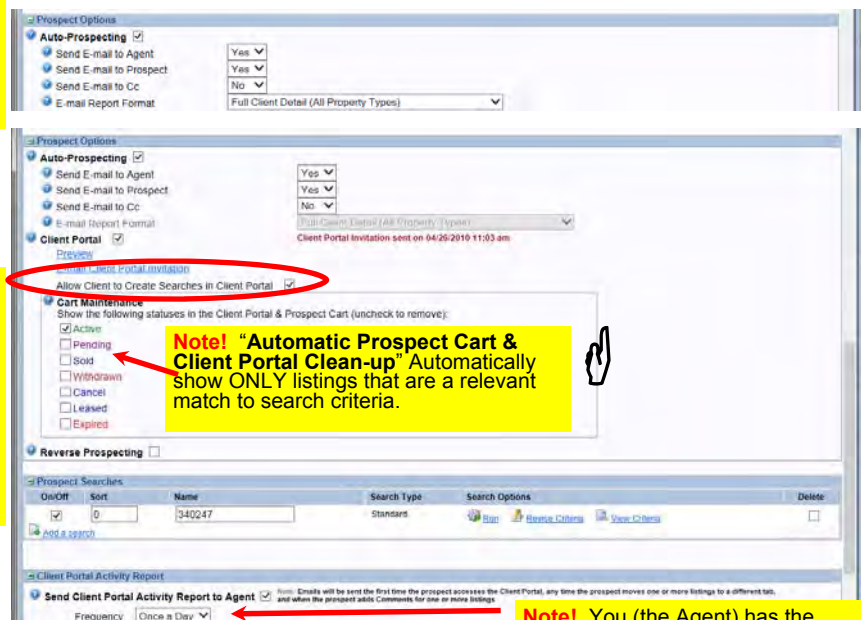
Note! "**Automatic Prospect Cart & Client Portal Clean-up**" Automatically show ONLY listings that are a relevant match to search criteria.
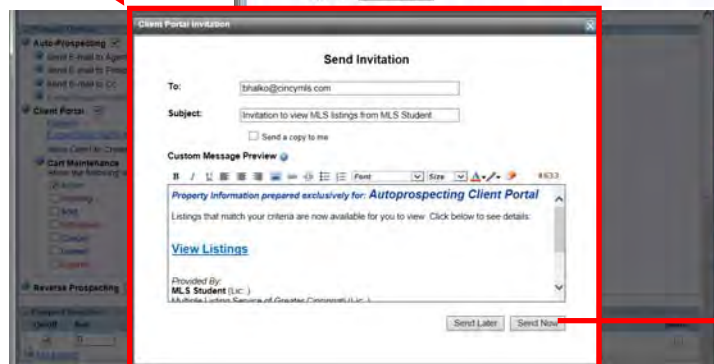
Note! You (the Agent) has the option to receive emails when there is client activity on your Client Portals. This feature can be enabled by checking the "**Receive Client Portal Activity Report**" check box. The frequency of the email can also be adjusted by selecting a value *(either hourly or once daily)* from the "**Frequency**" drop-down menu.
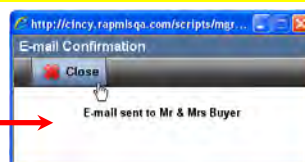
Prospects

Setting up a prospect is a 5 step process:

(Continued)

4) Initial Search Results:

The saved Prospect Search will be run with the matches saved in the Prospect's Cart in the "**Newly Matched**" tab.

For each listing, check-off and select the listings you want to move using the check boxes to the left of each listing and use the links that display near the top of the page, "**Saved**", "**Rejected**" or "**Agent Recommended**" to move the listings to the "**Saved**" or "**Rejected**" or "**Agent Recommended**" tabs.

Saved: Click on the "**Saved**" tab to display the listings that you just moved to the "**Saved**" tab— *the listings that are of interest to your prospect.* Listings that were most recently moved into the "**Saved**" tab are checked-off ☑. You can e-mail or print the selected listings.

Note! The initial matches of the prospect search, that result for this step, are not automatically sent the prospect. You must manually e-mail *(using the e-mail "Tool Bar" button)* the selected matches. If you enable "Auto-Prospecting," the computer will begin to "Auto-Prospect" from this point forward.

5) Managing the Prospect:

Manage the "auto-prospecting" results using the Prospect's cart and the Prospect e-mails. *(see next page)*

Managing Prospects

Each of your prospects has a Prospect Cart for keeping track of listings. Each cart is divided into four tabs: "*Newly Matched Listings*", "*Agent Recommended,*" "*Saved Listings*" and "*Rejected Listings*". When you look at your list of prospects you can see at a glance how many listings are in each prospect's carts. In the example to the right, prospect #3 "Mr and Mrs Buyer" has 12 Newly Matched Listings, 0 Agent Recommended, 12 Saved Listings, and 5 Rejected Listings in the cart. By clicking any one of the color-coded numbers, you can access the Prospect Cart.

Note! If you have "*Auto-Prospecting*" checked off (*recommended*), the system automatically adds the "newly listed", "price changed," "status changed" and "changed" listings that meet the prospect's criteria into the "Newly Matched" tab of the cart. In the example to the right, to access the "Newly Matched Listings" prospect cart for Prospect #3, point and click on "**12**."

Note! Listings will be added to your "Newly Matched" tab throughout the day. Those listings most recently matched will be checked-off ☑ in the column of check off boxes on the left hand side of the page.
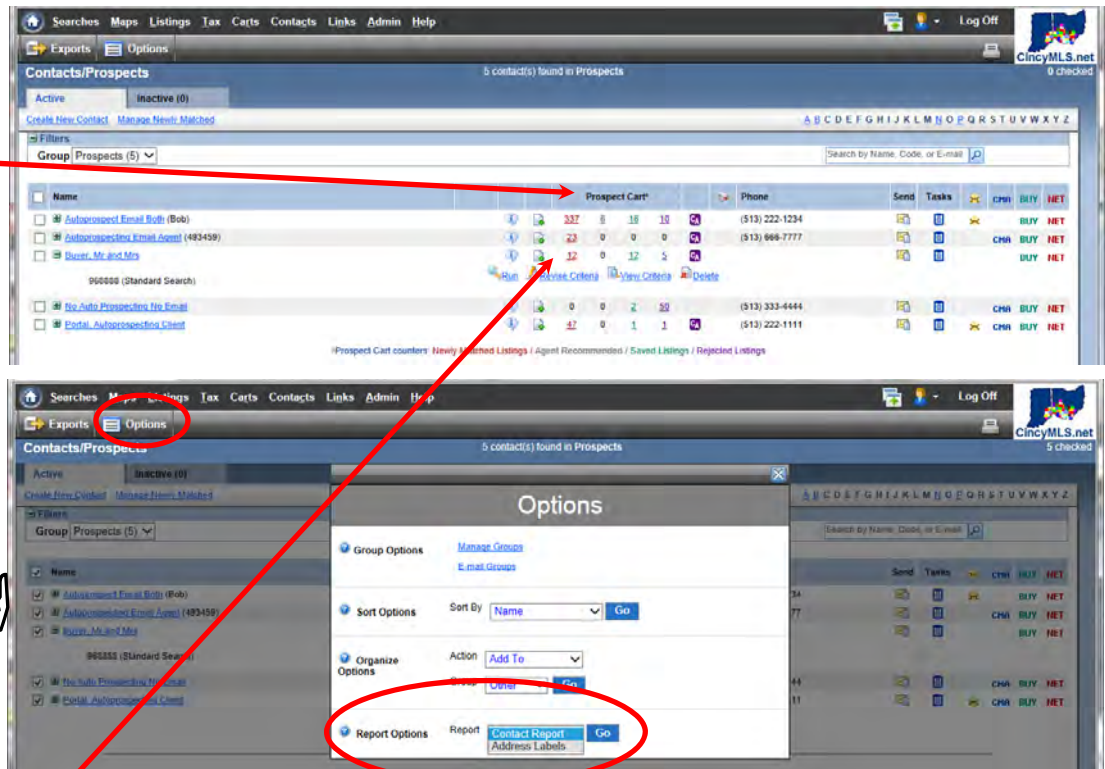
Note! To print a list of your contacts (*Contact Inventory*), check-off the contact(s). From the *(expanded)* "**Options**" window, click "**Contact Report**" from the pull-down "Report Options" selector list, then click "**Go**."

Note! To print Address Labels for your contacts, check-off the contact(s). From the *(expanded)* "**Options**" pane, click "**Address Labels**" from the pull-down "Report Options" selector list, then click "**Go**."

Note! If you do not check-off "Auto-Prospecting," you will need to "Run" the saved prospect's search manually. Click the plus symbol " **+** " next to the Prospect's name, then click "**Run**." You can control how often and when your prospects information is updated. *(Hint! Since listings are added to your "Newly Matched Listings" tab throughout the day (2 to 3 times a day), you may want to manually "Run" the prospect's search to find the newest matches for those prospects that are "hot." The prospect system will automatically search for matches since the system last auto-searched.)*

Note! In addition to above, click the plus symbol " **+** " then click "**Revise Criteria**" to change the search criteria or click "**View Criteria**" to display the Prospect's saved search criteria. The "Auto-Prospecting" prospect cart and email options for the Prospect will also be displayed. Click "**Delete**" to delete the prospect's search.

Note! Prospects can be "Inactivated", "Activated" or "Deleted" manually at any time. Click "**Prospects**" to display your inventory of prospects. Click on the prospect's name to display the prospect information. Click the "**Delete**" button in the "Tool Bar" to delete a prospect or using the pull-down "Status" selector list click on "**Active**" or "**Inactive**" then click "**Save**" in the "Tool Bar."

Note! Prospects stay in the system indefinitely. If after 90 days, there has been no prospect "activity" *(nothing has been added to the "Newly Matched Tab" or the prospect has not be "touched" - searched, modified, etc.),* an automated logon message will be displayed. The message will list the prospects that have had no activity for 90 days. Each prospect will have the "Inactivate" radio button selected. Click "**Continue**" to go to the "Home" page and "Inactivate" the prospect(s). Click on the "**Activate**" radio button to keep the prospect "alive"; click the "**Delete**" radio button to delete the prospect from your prospect inventory, then click "**Continue**" to go to the "Home" page.

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FOCUS Series
Page **14**   Revised: **Wednesday, August 20, 2014**
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(Backup Home Page – cincy.rapmls.com)   (Public Home Page – www.CincyMLS.com)

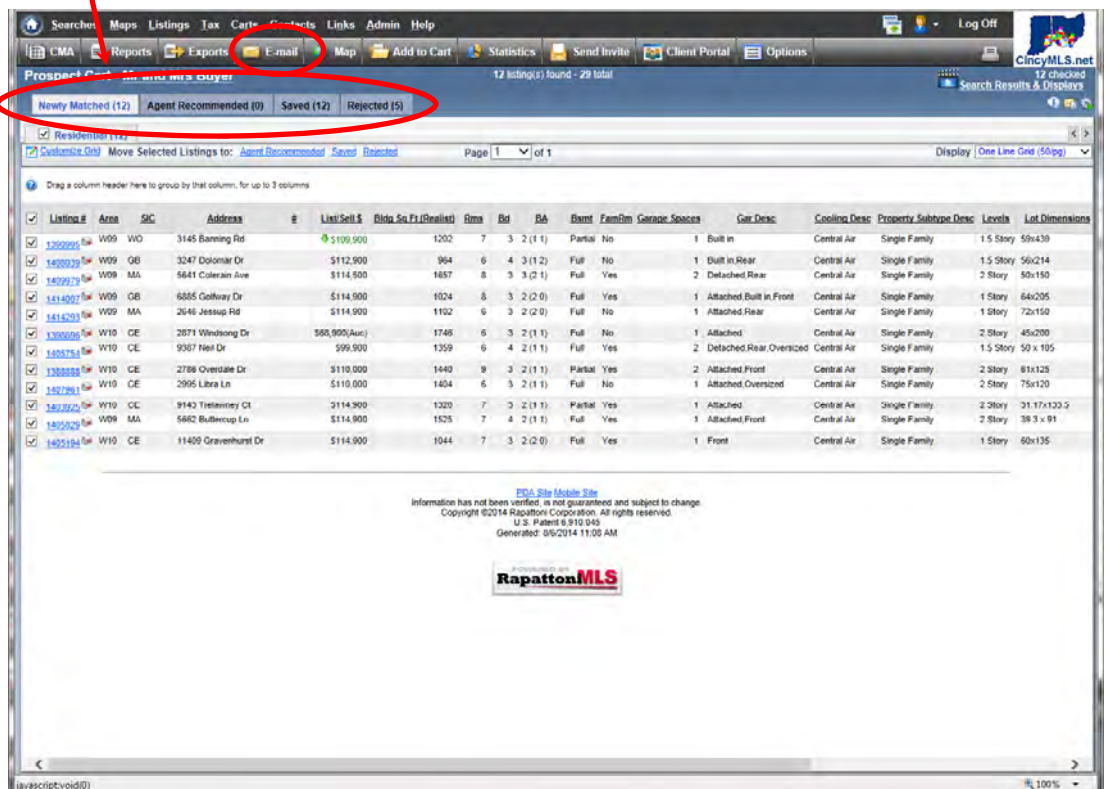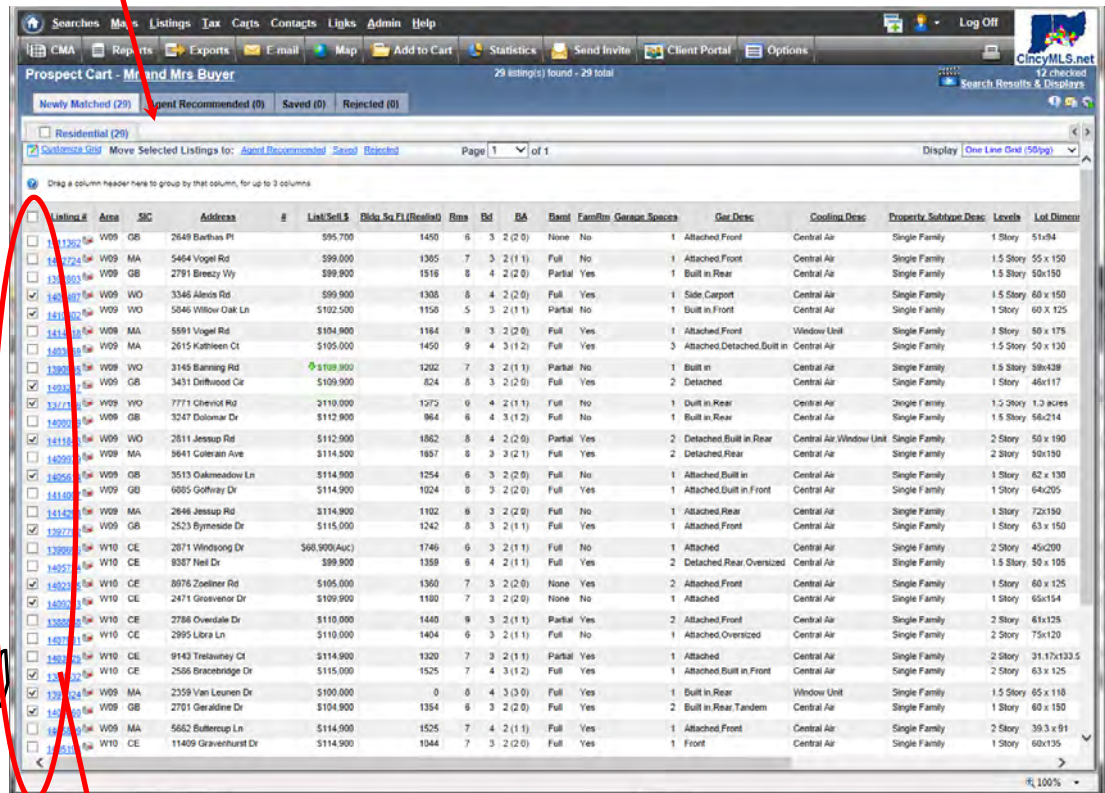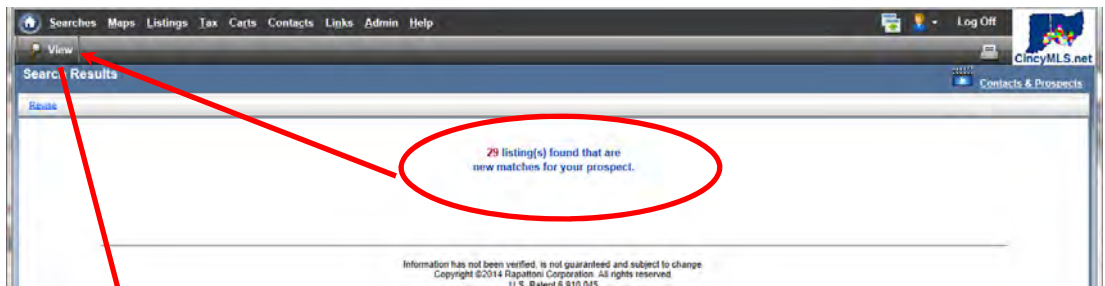## . Managing Prospects *Continued*

From the "Newly Matched" tab of the Prospect's Cart, check-off and select the listings you want to move using the check boxes to the left of each listing and use the links that display near the top of the page, "**Saved**" "**Agent Recommended**" or "**Rejected**," to move the listings to the "Saved" "Agent Recommended" or "Rejected" tabs.

Note! The objective is to "0" the "Newly Matched" tab so that the next time you "manage" your prospects, the "Newly Matched" tab contains only listings that are "new" or "changed" since your last prospect management or auto-prospecting.

Saved: Click on the "Saved" tab to display listings that are of interest to your prospect.

Note! Listings that have been most recently moved into the "Saved" tab are checked-off ☑. You can e-mail, print or export *(if available)* the selected listings. Use the check ☑ boxes on the left-hand column to move "Saved" listings into the "Agent Recommended" or "Rejected" tab

Rejected: This is where you want to keep listings that the prospect is <u>NOT</u> interested in, even though they may match the prospect's search criteria. Use the check ☑ boxes on the left-hand column to move "Rejected" listings into the "Saved" or "Agent Recommended" tab.

Note! And Hint! Two alternative ways to manage "Newly Matched Listings": **1)** From the Contacts/Prospects Page, click the "**Manage Newly Matched**" link at the top of the page to manage all of your prospects' "Newly Matched Listings" at once. **2)** From the "Newly Matched Listings" tab, click the "**MLS#** *(Listing #)*" to go a special "Listing Detail" display where you can check-off "Saved" "Agent Recommended" or "Rejected" from the "**Options**" window while viewing the listing details of each listing, then, move on to the next "Newly Matched Listing."

Note! Click the "**Comments**" link to enter comments. Click the 🖼️ ICON to read your comments. If your Client has left comments *(via the Client Portal)*, the ICON will display with the postal "flag" up. 🖼️
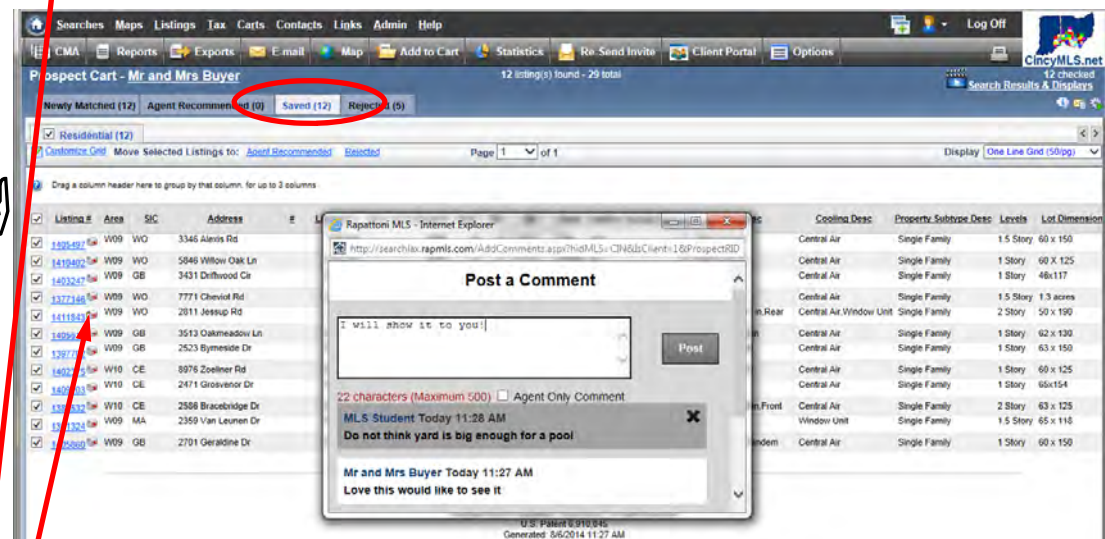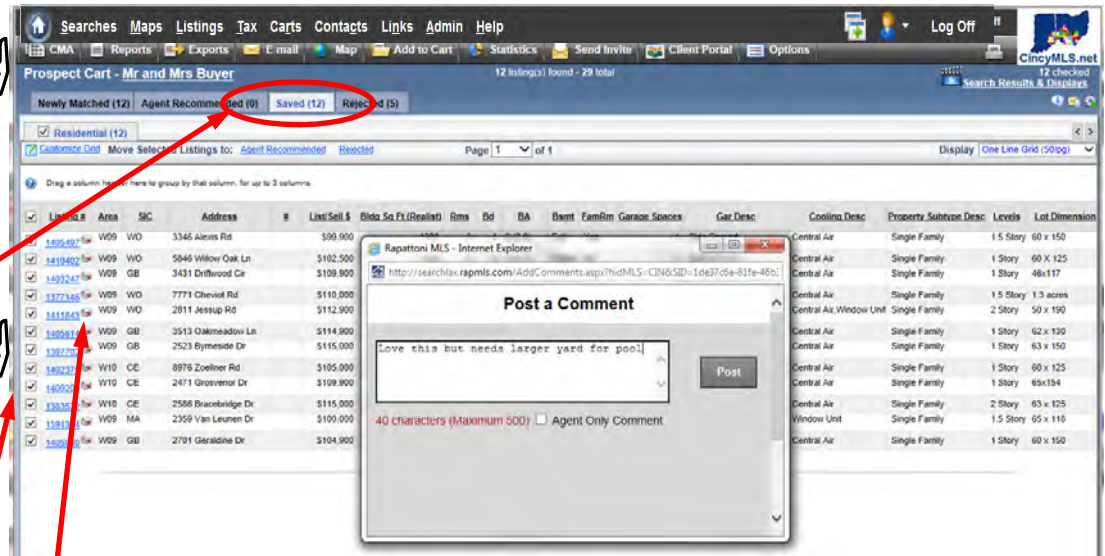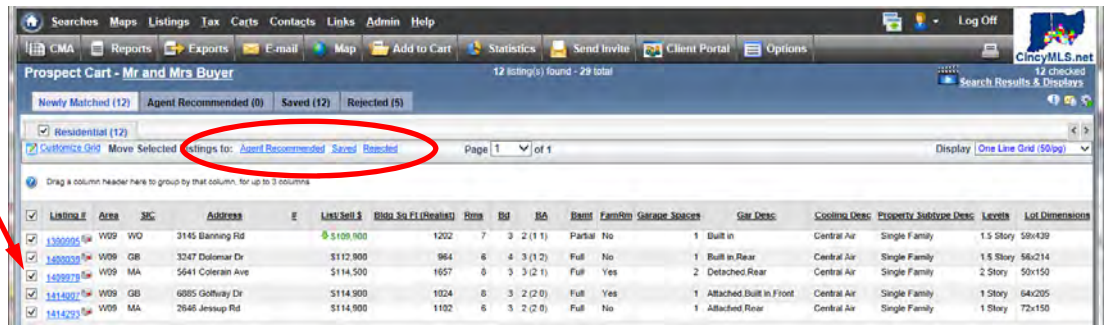
Note! Additional Notes! Auto-Prospecting E-mail

Note! Prospects who are set up to receive auto-prospecting e-mail messages have the option of *unsubscribing* via a link at the bottom of the e-mail message. Prospects that click the link are unsubscribed automatically in the MLS, and will not be sent further auto-prospecting e-mail. The agent is informed by e-mail whenever a prospect chooses to unsubscribe; in addition, the message "Prospect has unsubscribed from auto-prospecting" displays on the Modify Contact Information page.

Hint! For those Contacts/Prospects where you are no longer acting as the "Buyer Agent," "Auto-Prospecting" should be turned off, so that the client no longer receives auto-prospecting e-mail messages.

Hint! Prospects may have installed "firewalls," "virus software" or adjusted their "e-mail client software" to block messages containing links/scripts and/or e-mails in "html" format. This may cause the auto-prospecting messages to be blocked. If prospects are not receiving auto-prospecting e-mails, try sending the client a "plain text" message, then a plain text message with a PDF report attached. This may help identify the e-mail problem!

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Interactive One Line Grid Results Display Format

👆 **Note!** The One Line Grid display format offers several exciting features when viewing listings:
- You can click any column heading to sort listings by that column. Clicking the column heading again reverses the sort order. **Hint!** Hold the Ctrl `Ctrl` key down and click up to 3 column headings in sort priority, release the Ctrl key to sort up to 3 levels at the same time!
- Click and "drag" up to 3 column headers above the grid to "group" the results.
- Click and "drag" the column header "margins" to resize the columns. *(similar to Microsoft Excel)*
- You can customize your own One Line Grid: select the columns and icons you want to display, and specify their order.
- You can customize your One Line Grid "on the fly" by simply dragging and dropping columns in your preferred order.
- You can customize multiple One Line Grids: select columns and icons you want for each "Property Type" or purpose/use!

👆 **Note!** The One Line Grid display format will automatically be set as the default Search Results Display Format in your Agent Preferences page. You can change this setting if you want to have your search results initially display in a different format. To change your Search Results Display Format default, from the "Menu Bar" click "**ADMIN.**" From the ADMIN menu click "**Your Preferences.**" From the "Your Preferences" page click "**Searching Defaults.**" (or "**Hotsheet Defaults**") Use the pull-down selector button to click and select your preferred default Search Results Display Format, click "**Save**" in the "Tool Bar."

👆 **Note!** The One Line Grid Display format can be customized. To customize the One Line Grid Display, from the "Menu Bar" click "**ADMIN.**" From the ADMIN menu click "**One Line Grid Setup.**" Or customize the One Line Grid Display "*on-the-fly.*" To customize "*on-the-fly,*" from "Search Results" page, click "Customize Grid" found in the "Link Bar" just above the Search Results.

👆 **Note! Remember, you can customize the One Line Grid by Property Type and/or purpose/use.—Create as many as you like!**

The "Available *(Property Type)* Fields" display on the left. The default "Selected Fields" display on the right.

To change the order of the "Selected Fields" **click the field name**, then click "**Move Up**" or "**Move Down.**" Alternatively, you can also change the order by reassigning the sort order values in the Sort column.

To remove a "Selected Field" **click the field name**, then click "**Remove.**" To add an "Available Field **click the field name**, then click "**Add.**"Selected Fields" on the right. **Hint!** Click and move one field at a time, or hold the "Control" key `Ctrl` down and click to select multiple fields.

Using the check-off boxes you can choose what ICON-links will be included in your personal setup.

Use the "Tabs" at the top of the page to design a unique One Line Grid Display format for each of the MLS Property Types. When complete, click "**Save**" in the "Tool Bar."

Use the "**New**" Tool Bar button to add additional One Line Grids to the same Property Type. Use "**Copy**" to copy an existing Grid to create a new grid and then modify it for your purpose/use.

👆 **Note! And Hint!** If you attempt to create your own custom "One Line Grid" display format, and are not satisfied, want to start over, or want to restore the Default MLS One Line Grid display format, simply click "**Restore Defaults**" followed by "**Save**" in the "Tool Bar."

👆 **Note! And Hint!** Do you like the "One Line Grid" display… but do not like to scroll form left to right? Consider a new "widescreen" monitor! No scrolling; same font size—or larger!

Standard Monitor   **Widescreen Monitor**

Home Page – www.CincyMLS.net   Wireless PDA Home Page – cincy.rapmls.com/pda
(Backup Home Page – cincy.rapmls.com)   (Public Home Page – www.CincyMLS.com)

Results Page Options

Note! When displaying "Search Results," the "**Options**" window offers Save, Sort and Selection options To open the "**Options**" window, click "**Options**" in the tool-bar.

From the Search Results "Options":

1) **Selection Options:** You can click "**Check All**" or "**Uncheck All**." You can click "**Remove All Unchecked**" or "**Hide All Unchecked**" to reduce the results list to just those listings that have been selected.

2) **Sort Options:** You can control how listings sort in your search results. You can specify up to three levels of sorting. If you want to change how listings sort for a particular search, pull-down the "Sort By fields" and select the desired sort options. Click "**Go**" to refresh the page and display the results using the new sorts. **Hint!** Check-off "**Sort As Selected**" to manually put the listings into a preferred order. *(Numbering boxes will appear on the results page.)* Point and click in the "numbering boxes" and re-number the listings in the order you prefer. Click the "**Refresh ICON**" in the "Options" pane.

Note! Listings are sorted based on the sort options set up on "Your Preferences" page under "Searching Defaults." Click **ADMIN** in "Menu Bar," click "**Your Preferences**".

3) **Save Options:** You can "**Save as a Saved Search**," "**Save as a New Prospect** (Search)," "**Add Search to Existing Prospect**," or "**Save Listing(s) to Prospect Cart**." You can save an unlimited number of searches.

One Line Results Page—Options
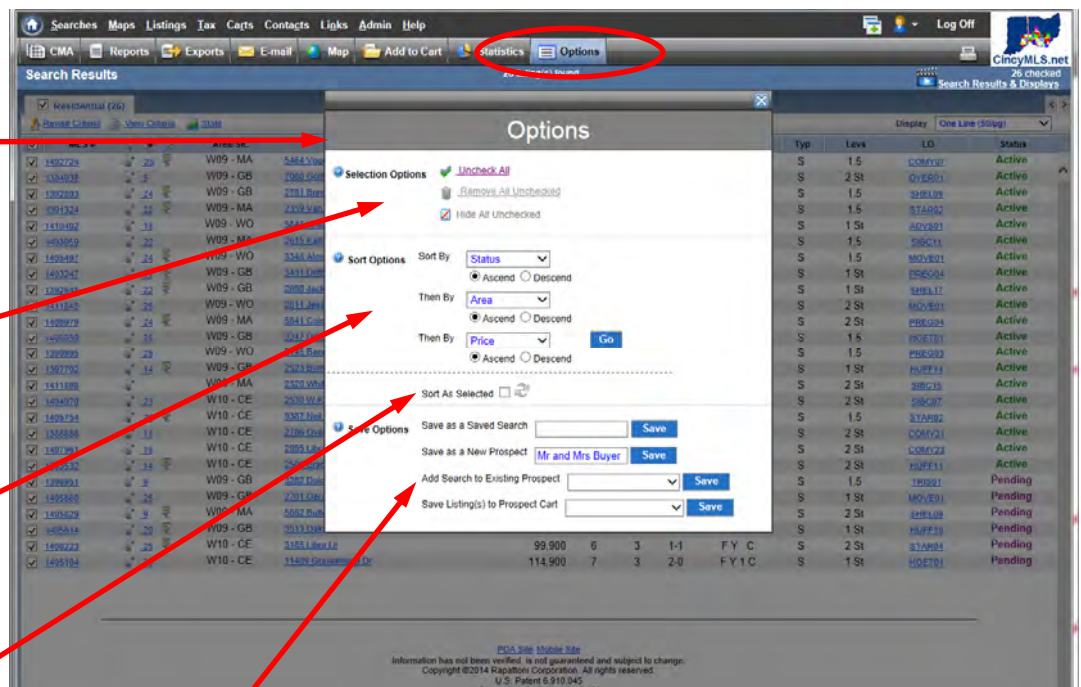
One Line Grid Results Page - Options
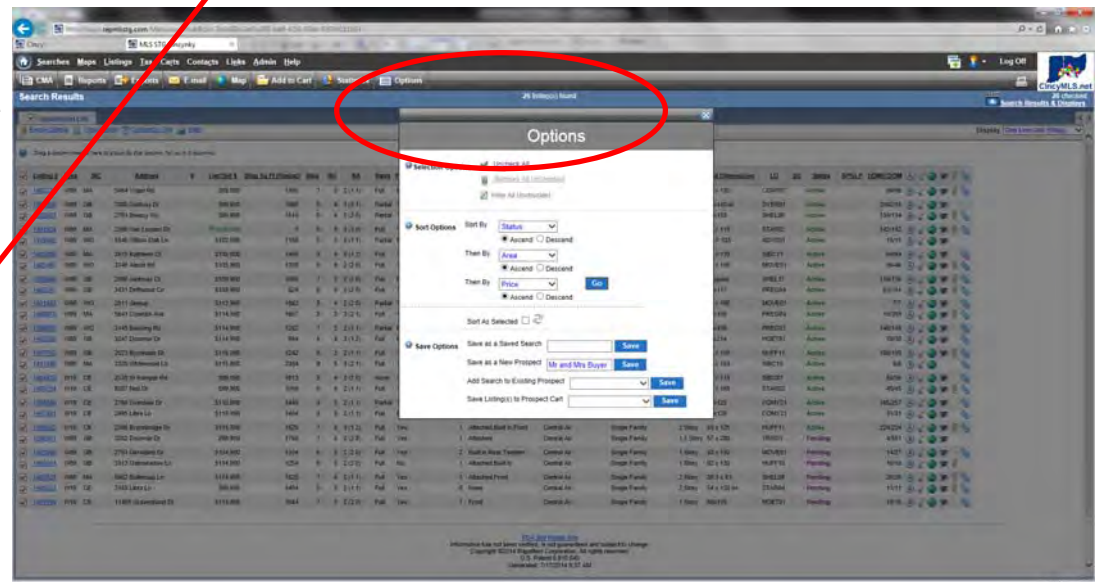
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Links

Agents
(see page 27 for more info)

You can offer a "real time" view of your MLS listings, your personal information page, and a IDX (*Broker Reciprocity*) search for MLS listings and open houses right on your agent's Web site.

From the "Menu Bar," click "**ADMIN**," then from the "ADMIN" menu, click "**Public Access Links**." Locate the "Hyperlinks." Click "**Copy Link to Clipboard**" and paste link text in an e-mail message to your Webmaster, or directly into your web site layout. Attach this link to a button, graphic or link. Repeat for all of the "Hyperlinks" that you wish to use. Alternatively you could simply "print" this page and give it to your Webmaster.

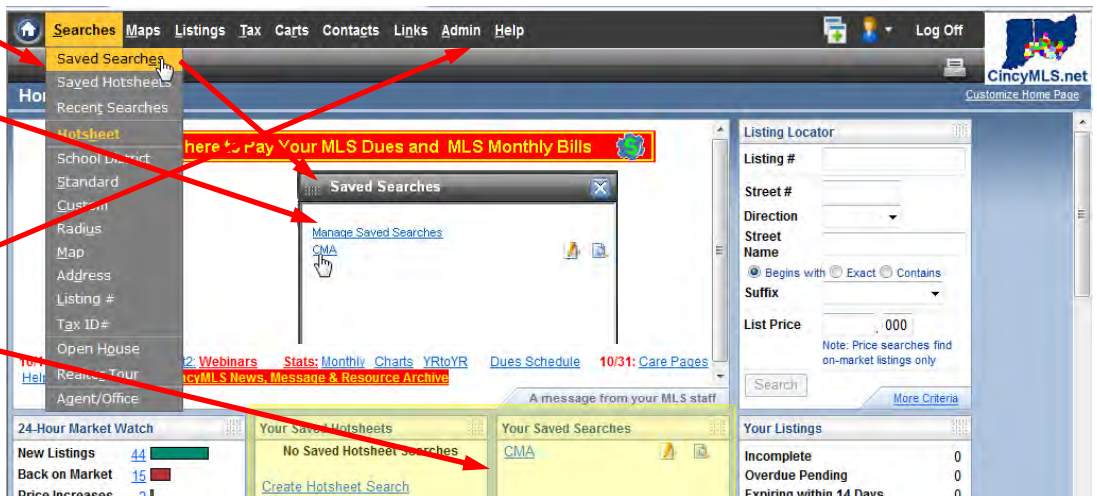**Note! Links Available to Individual Listings!** —The "Listing Detail" page contains a live URL link to the listing detail *(public)* view, which you can copy and e-mail to someone or add to a Web page. This feature lets you link directly to an individual listing's public-viewable detail, complete with additional pictures, a map, virtual tour, etc.

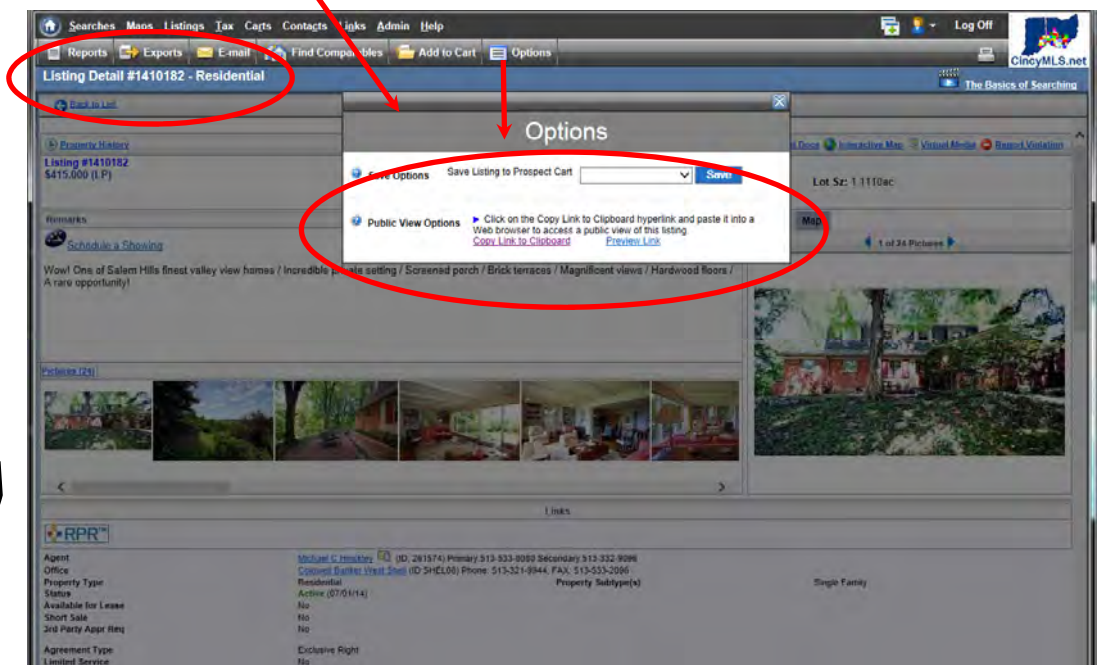**Note!** There is no charge to use these links!

Brokers
(see page 28 for more info)

You can offer a "real time" view of your office listings, your office open house listings, your company listings, your company open house listings, your agent roster, your office information, and a IDX (*Broker Reciprocity*) search for MLS listings and open houses right on your company's Web site.

From the "Menu Bar" click "**ADMIN**," then from the "ADMIN" menu, click "**Office Menu**," then from the "Office Page," "Office Settings," click "**Public Access Links**." Locate the "Hyperlinks." Click "**Copy Link to Clipboard**" and paste link text in an e-mail message to your Webmaster, or directly into your web site layout. Attach this link to a button, graphic or link. Repeat for all of the "Hyperlinks" that you wish to use. Alternatively you could simply "print" this page and give it to your Webmaster.

Note! There is no charge for these links!

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Note! You can generate an IDX link from a Saved Search!

- Simply Click "**Copy Link to Clipboard**" and add the link to your webpage.
- Note! The Saved Search IDX link will follow all of the IDX rules for presentation and display
- Only on-market listings will be presented (Active and Pending)
- Saved Searches utilizing fields that are <u>not</u> public viewable (i.e. Short Sale, Property Ownership, Realist2 Bldg SqFt, etc.) will not generate an IDX link.
- A maximum of 150 listings will be shown on the results page
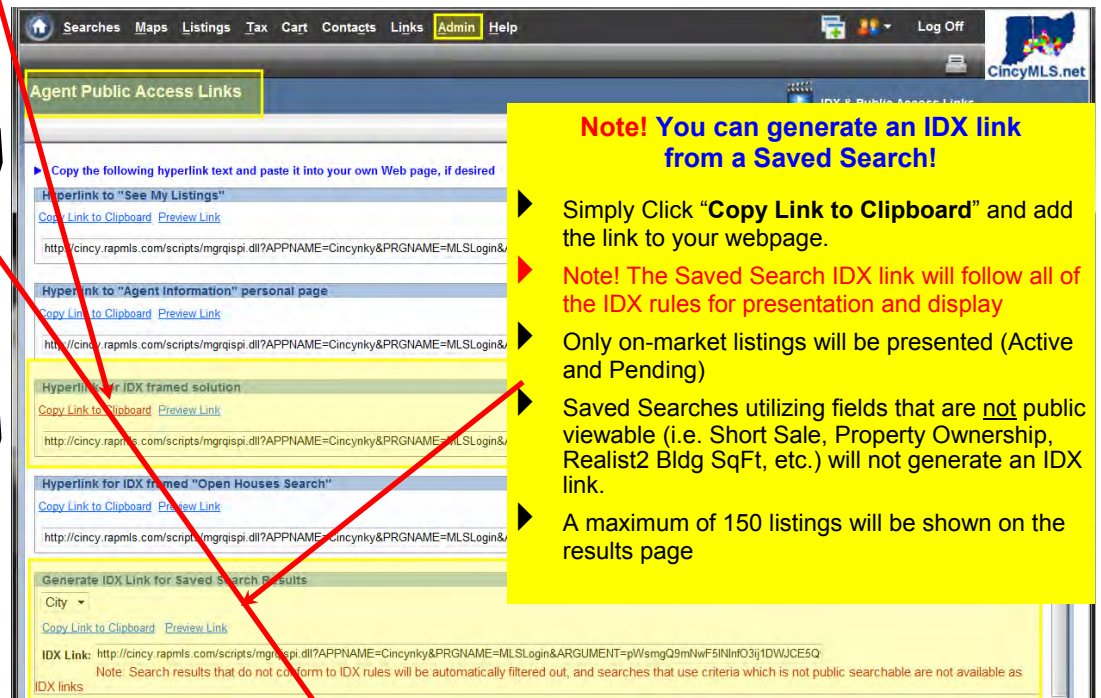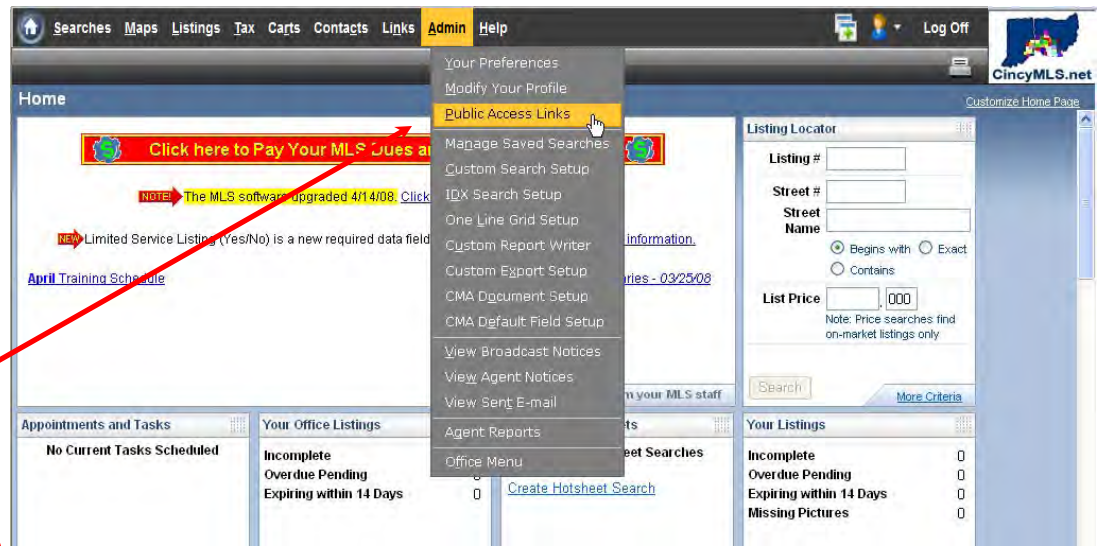
Agent IDX Search

IDX *("Internet Data Exchange")* or BR *("Broker Reciprocity")* allows member Agents to offer on their own agent web sites a "public search" of real-time MLS data, including their own listings and those of other IDX participants.

From the "Menu Bar," click "**ADMIN**," click "**IDX Search Setup**."

Setting up your "IDX Search" is a 3-step process.

Step 1: Select the Criteria for your IDX Search Page

"Available Fields" you can select from display on the left. Point and click to select the field you want, then click the "**Add**" button to move them into the "Selected Fields" on the right. **Hint!** Click and move one field at a time, or hold the "Control" key Ctrl down and click to select multiple fields. You can "**Remove**" "Selected Fields" in the same way. You can rearrange the fields using the "**Move**" buttons; just click on an item in the "Selected Fields" and click "**Move Up**" or "**Move Down**", as desired. Click "**Save**" in the "Tool Bar."

Step 2: Select the colors for the IDX elements in your IDX search page

To select the colors, in the "Custom Form Colors" section at the bottom of the page, click the color wheel ICON next to the desired web page component. In the "Color Chooser" window that displays, click directly on the desired color. A sample of the selected color automatically displays next to the appropriate web page component. Select the colors that "blend" with your web site. Click "**Save**" in the "Tool Bar."

Step 3: Connecting your web site to your IDX search

From the "Menu Bar" click "**ADMIN**," then from the "ADMIN" menu, click "**Public Access Links**." Locate the "Hyperlinks." Click "**Copy Link to Clipboard**" and paste link text in an e-mail message to your Webmaster, or directly into your web site layout. Attach this link to a button, graphic or link. Repeat for all of the "Hyperlinks" that you wish to use. You can offer a "real time" view of your listings, your contact information, and an IDX (*Broker Reciprocity*) search & IDX Open House search for MLS listings right on your Web site. Alternatively you could simply "print" this page and give it to your Webmaster.

**Note!** **There is no charge for these links!**

Note! **Alternatively**, you can frame your Company's web site IDX search or contract for an Agent level IDX feed for a custom consumer IDX search. Contact MLS for more information.

FOCUS Series
Page 19   Revised: **Friday, February 21, 2014**
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Click here for sample agent's website using the FREE Rapattoni Smart Framing Links!
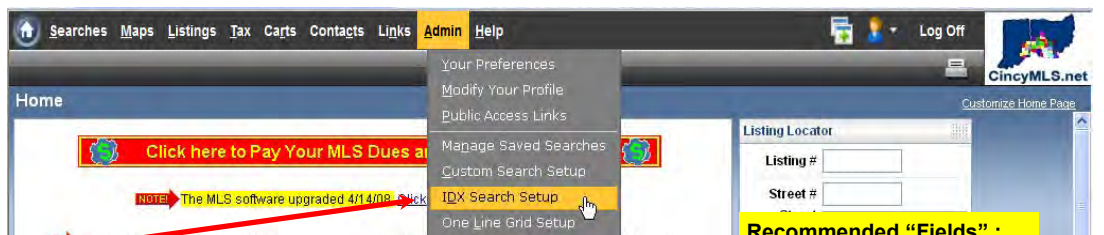
Recommended "Fields":
1) Property Type
2) Map
3) Suburbs
4) Zip Codes
5) Counties
6) Price
7) Beds/Baths
8) Lot Size (Acres)
9) Age
10) Listing Numbers
11) Address
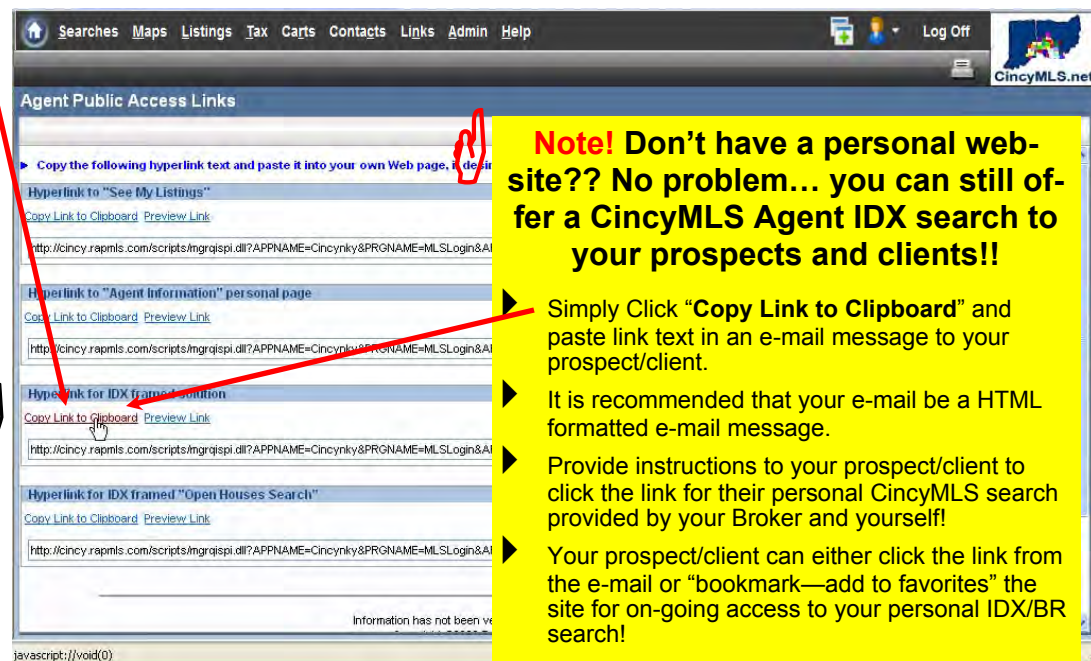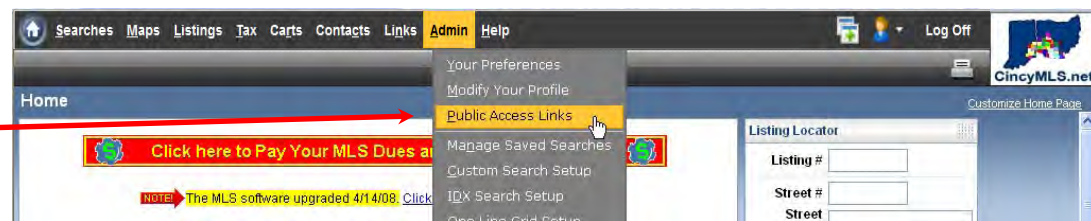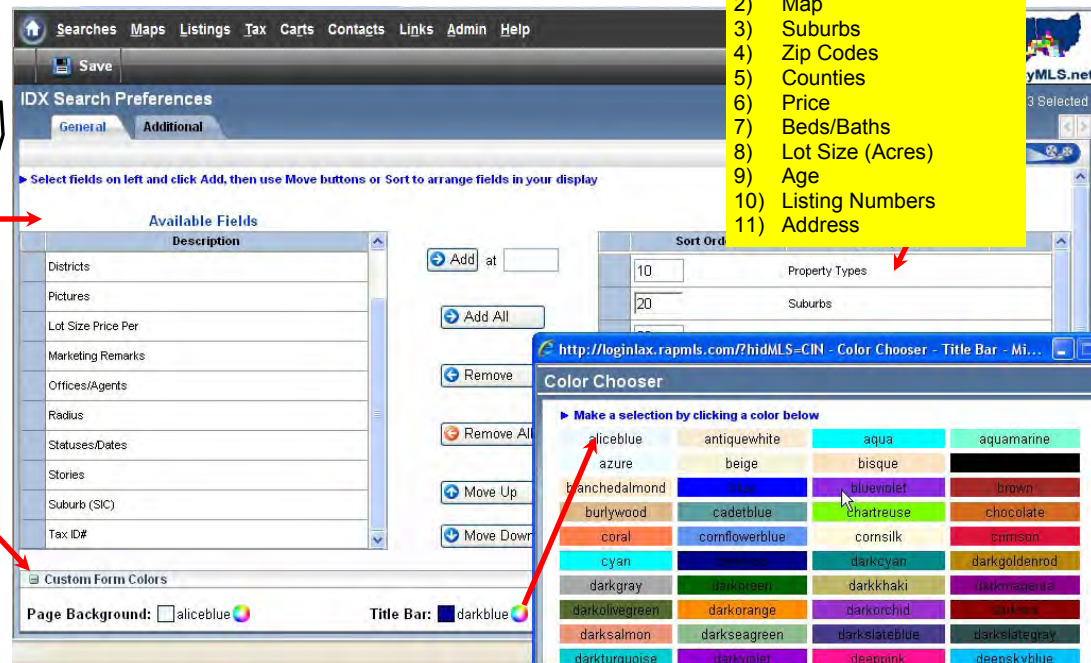
Note! Don't have a personal website?? No problem… you can still offer a CincyMLS Agent IDX search to your prospects and clients!!

▶ Simply Click "**Copy Link to Clipboard**" and paste link text in an e-mail message to your prospect/client.

▶ It is recommended that your e-mail be a HTML formatted e-mail message.

▶ Provide instructions to your prospect/client to click the link for their personal CincyMLS search provided by your Broker and yourself!

▶ Your prospect/client can either click the link from the e-mail or "bookmark—add to favorites" the site for on-going access to your personal IDX/BR search!

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