Basic Function FAQ

Home Page

Q: I have an assistant. Do I need to share my password with them?
A: No. Click on the link Signed in as: (your name). In the dialog box, the top box displays who you may sign in as. The bottom box displays who is allowed to sign in as you. This can be changed as needed. There is no limit to the number of members you can give permission to.

Q: My partner works in a different office. Will the Signed in as feature work for them?
A: This function works when MLS participants are part of the same firm.

Q: My assistant no longer works for me. How do I remove their name?
A: Click on Signed in as, highlight their name and click Delete selected shared identity. Brokers are responsible for notifying ABoR of an assistant's departure. The new Assistant will require a newly assigned SafeMLS Token.

Q: Is there a way I can monitor this on a daily basis?
A: Yes, check the "Show Sign-In As option when I log in" box. This will bring up the dialog box every time you log into the MLXchange.

Q: How will I know if there are any new matches for my Prospects?
A: The Home Page, in the top-left hand corner has a counter that includes a link to take you to the new matches for your clients.

Q: Is there a quick easy way to tell that my client's searches are about to expire?
A: Yes. The Home Page has a counter with a link to any client's searches expiring within 3 days.

Q: I am answering the phones for my office. Is there an easy way to see all the New and/or Active listings for my Office or my Firm?
A: Yes. The Inventory Watch box on the Home Page is a link for all the New listings. It displays your Office Listings within the last week plus all those of your Office. The same will be for the My Firm link as well.

Q: How can I quickly search for a specific client?
A: In the Find a Client box on the Home Page, you can type in either the first or last name of the client and click the green action arrow. This will bring up the client's information.

Q: I need to add a new client. How do I start this?
A: Hover over the Clients in the blue tool bar, click on the Clients icon in the center of the Home Page, or click on the Add a new client link in the Find a Client box on the Home Page.

Q: Where can I find appointments I have scheduled in MLXchange?
A: On the Home Page, in the Today's Summary box are counters for new emails in your Appointments for the day and To-Do's you've scheduled.

Q: How will I know if I have received a new email to my MLXchange email address?
A: You will be alerted in the Inbox section of the Today's Summary box on the Home Page.

Q: When new leads are generated from my web site, how will I be notified?
A: The New Leads counter will display the number of new leads generated by your web site. This is located in the Today's Summary box on the Home Page.

Q: I need to search a listing by the ML#. How can I do this quickly?
A: In the Find a Listing section on the Home Page, you can either search by the ML# or the property address. If searching multiple listings, use a comma to separate, do not include spaces. When searching by Address, you can determine if you only want active statuses for the address, or all listings for that specific address.

Q: Is there a quick way to access one of my listings to modify?
A: Yes. Use the Inventory Watch box on the Home Page, you can bring up any of your current listings to modify and edit. This will bring up all of your listings in that particular status. Hover over the Information Bubble to bring up the Edit icon (looks like a piece of paper with pencil).

Q: How do I bring up the Message of the Day board after I have already been viewed?
A: You can click on the Message of the Day link in the Resources box on the Home Page. This will bring up a new window with the board.

Q: How can I customize my links on the Resource page?
A:

1. Go to Setting link and click
2. Click on Personal Settings
3. Click on Personalize Home Page Resource Link
4. Enter a description for the link in the corresponding field, this is what will be displayed on the home page.
5. Enter the Internet address (use http://) to where you want the description to take you.
6. Use the 'Test link' to check if your links are valid.
7. Click Apply

Note: Once you have added the first Personal Link, and Edit button will appear to add or modify the existing links.

Q: Is there a way to customize the Today's Hotsheet from the Home Page?
A: Yes. Click on the link Change my criteria and this will bring you to the page to change the information that is displayed automatically on the Home Page for the Hotsheet.

Q: I logged in earlier today and recently went back to the Home Page. I noticed the totals for the Hotsheet haven't changed. Why is that?
A: You have to click the Refresh link at the bottom of the Hotsheet box for it to check the new Hotsheet at that time. The totals do not automatically update when you click on the Home Page.

Q: I want to see at a quick glance the different in the Hotsheet over the last 2 days. How can I do that?
A: Change the Day's Back from 0 to 1 or 2. This will automatically re-calculate the numbers for your Hotsheet.

Q: Is there a difference between the picture icons and the blue tool bar across the top of the page?
A: No. These are the same features as the headers and will take you to the same page in MLXchange. The picture icons do not have the drop-down menus as the tool bar across the top offers.

Q: How do I add Personal Links to My Sidebar?
A: The links on My Sidebar are duplicated from the Resources on the Home Page. Make the modifications on the Resources and they will duplicate automatically onto My Sidebar.

Q: How many Sections in My Sidebar am I allowed to add?
A: You can add and name up to 12 Sections for My Links.

Q: How many links inside each section on My Links am I allowed to enter?
A: Each section can hold 30+ links.

Searching

Q: How can I do a member or office search?
A: 1. Click Search from the Navigation Toolbar at the top of the screen.
2. From the Search Type menu, select Member of Office.

Q: How do I search for multiple property types at one time?
A: Select Cross Property from the Search Type drop-down menu

Q: How do I select all values in a search field?
A: Double click anywhere in the drop-down menu. This will select all the selections in the pick list.

Q: How do I de-select all values in a search field?
A: Double click anywhere in the drop-down menu. This will clear all selections in the pick list.

Q: How can I search ranges or exact matches?
A: Click on the Show/Hide Advanced Search Options link at the bottom of the page. This will give you the option to turn on/off the advanced search functions, such as Contains, Exact Match, etc.

Q: How do I retrieve a Saved Search?
A: Click on the name of the search in the Saved Searches panel.

Q: Can I set up default templates and grids to use in my searches?
A: Yes. Click on Settings → Personalize → Edit Favorites. This will allow you to save your default search template you created, or custom grid.

Q: How do I make a copy of a saved search?
A: Open the saved search, select Save As from the Action menu and click the green arrow. Name the new search.

Q: How do I stop a search while it's running?
A: Click the Internet Explorer's Stop button.

Q: How do I search by ML number?
A:

1. In the Find a Listing action box on the Home Page you can type the ML number, click the ML# radio button and click the green arrow button. **OR**

2. You can also click on Search from the Navigational Toolbar and select ML# Search from the Search type drop-down menu. Enter the full or partial ML number and click the Results button.

Q: I used to search in other systems using the percent (%). How do I search in MLXchange?
A: MLXchange doesn't use additional characters to search. Click on the Show Advanced search options link. This will bring up the Advanced Search Options (Exact Match, Begins With, etc.).

Q: Can I search by multiple addresses?
A: Yes. Select the property type you wish to search in. Click on Enter Multiple Addresses…. This will bring up a new window where you can enter up to 10 different addresses. Click OK when done.

Q: What happens if I'm in the middle of a task and I get timed out? Do I lose everything?
A: No. MLXchange automatically saves the information. The login screen will appear in a new window, and bring you back to the same location before you were timed out.

Q: I am trying to search All status for listings that have the expiration date of 30 days +/- from today. My search results are not complete. Why is that?
A: You may not search Expiration Date of an On Market Status listing. These include A, AC, P, PB, PO and T. Consider removing these statuses from your search.

Q: I am trying to conduct an Address search and the property is not coming up. What am I doing wrong?
A: Do NOT use street designations while conducting a search. This includes both spelling and abbreviations. A few examples are:

- Street, St
- Cove, Cv
- Circle, Cr
- Lane, Ln
- Drive, Dr

Q: My client called about a property they saw, but are not sure what kind of dwelling it is. How can I find the listing?
A: You can type the address of the property in the search box on the Home Page. This will conduct a cross-property search. Also, the "All" category (Property Search) is an easy way to search for a property, even when you don't know which category the property is listed in.

Q: My client wants a property that has a house sitting on 22 acres. Which property type should I search in?
A: Properties with larger acreage go in the Farm/Ranch/Acreage category. This includes property both with and without a dwelling. Any property with a dwelling on it may also be listed in the Residential category. A property must fit the criteria of both property types to be entered in each. To make sure all the results are found, search in both property types.

Q: My client does not want a house with a deck in the back yard. How can I exclude this feature?
A: If your client is searching for a property, but does not want a particular criteria, you can include that in a "Not" search.

Q: I am looking for a sales history of a specific property. How can I find this?
A: Through the PAR (Property Archive Report). The MLS database contains archives from 1997. Before 1997, ABoR maintains copies of the old Sold Books members may view during business hours.

Q: My client is looking for a property with specific needs. The field(s) I need are not on the System Default search. How can I add them?
A: You can customize your search by adding fields at the bottom of the search box.

Q: I want to include different columns than the default shows. How can I change the columns?
A: If you wish to display a Property Grid report with fields other than the default, click on the Column Manager in the Action box. This will allow you to customize your grid. You may also sort the columns by clicking on the header.

Q: My client has changed the criteria information for the Saved Search I am sending through auto-notification. Do I need to do anything special after changing the criteria?
A: No. The system will continue sending listings that meet the criteria of the search information, even if the criteria changes. You do not need to alter their record.

Q: I am trying to find the contact information for a specific Office. I'm entering all the information I know for that office and I don't receive any results. Why is that?
A: When searching the Member or Office Roster enter only the last name and first initial, or first name of the Company and click the Search button and then click the Agent's or Office's name in the list.

Q: I am not sure of the exact name of the Street my client is looking for. What is the best way to find listings?
A: Use the Advanced Search Features, and use the Contains option. This will search for that word or phrase anywhere in that field. Example: Searching in Residential listings in Travis county, type cliff in the street name field and the system will return all streets with the word "cliff" in the name, example: Briarcliff, Red Cliff and Cliffwood.

Q: How do I change search fields for a search?
A:

1. Click on Search from the Navigational Toolbar.
2. From the Action drop-down menu select Template Manager and click the green arrow button.
3. Select the Template you wish to modify from the Available Search Templates list and click Modify.
4. Add or remove fields using the > and < signs
5. Click Finish when you have completed your selections.

Results

Q: How do I show a map of a listing?
A: From the Results Screen, select Map View from the Action list OR

1. Select the listing, then click the Details button
2. Click the Map link from the list on the left.
3. Clicking on the plus (+) and minus (-) signs on the right will zoom in and out on the map.

Q: How do I show only properties with the same status?
A: Select status type from the Status drop-down menu.

Q: How do I see a full listing report?
A:
1. Click Search from the Navigational Toolbar.
2. Enter the desired criteria for your search and click Results.
3. Select the listings you wish to see and click the Details button.
4. You can select different reports to view by selecting from the Reports drop-down menu located at the top left corner.

Q: How do I show only selected listings in a grid?
A: After selecting the listings you desire, select Show Selected from the Selection menu in the Results screen.

Q: Can I set up default templates and grids to use in my searches?
A: Yes. Click on Settings → Personalize → Edit Favorites. This will allow you to save your default search template you created, or custom grid.

Q: What is and how do I use the Information Bubble (the bubble with the "i")?
A: The I Bubble contains quick links to information pertaining to that particular listing. Hover over the Information Bubble icon and slide mouse to the icon with the information you need. Click on the icon. This will open up in a new screen.

Q: Is there a way for me to create Driving Directions for my client?
A: Conduct your search and go to the results page. Select the listings you wish to include in your route. You can modify the order of the listings by selecting the listing and then click the up and down arrows to move it to the correct order. Select the Driving Directions from the Action menu and click the green arrow.

Q: How can I display selected listings?
A: Check the listings you wish to keep and click on the show

Q: How do I narrow the results by price range?
A: Once you have your results, click the Price arrow and use the slider control. The listings will adjust.

Q: Can I select all the listings as once?
A: Yes. Click the check mark column header. This will select all of the listings at once. If you wish to de-select all of the listings, click the box again.

Q: How can I preview a quick listing report?
A: Click any where on that line from the grid. This will open the Preview box. Click again on the line to close the Preview box.

Q: How do I begin a CMA from the results?
A: Select the listings you wish to use in the CMA. Select Create CMA from the Action menu at the bottom left corner and click the green arrow.

Q: How do I export listing data to a text file?
A:
1. On the Results page (after completing a search), select the listings you wish to export.
2. From the Action drop-down menu select Export Data and click the green arrow button.

3. Under Select Records to Export you can choose either Selected Records or All Records. Click Next.
4. Under Data Export Format, choose the format you desire. Your choices are: Comma Delimited, Tab Delimited or Pocket Real Estate. You can also choose to compress the data. Click Next.
5. The next screen allows you to include Column Headers. Click Next. (Does not apply to Pocket Real Estate)
6. Make sure you remember where you save the file.

Q: How do I export listing images to a file?
A:
1. On the Results page (after completing a search), select the listings with the images you wish to export.
2. From the Action drop-down menu select Export Images and click the green arrow button.
3. Under Select Records to Export you can choose either Selected Records or All Records. Click Next.
4. Make sure you remember where you save the file.

Q: How can I change the column headers on my grid?
A: Select the Column Manager from the Action menu in the bottom left corner and click the green arrow. Name your grid and make the selections you wish to add or remove.

Q: Can I change the size of the column headers in my grid?
A: Yes.
1. Place your cursor between two column headers.
2. Your cursor will change from the arrow to an adjustable icon. Click on the column header.
3. You will be able to adjust each column to the size you wish.

Q: How do I sort a column?
A: Click the column header of the column you wish to sort. Click the header again and this will sort the other direction.

Q: I noticed the icons in the Information Bubble and the left side of the screen is not always the same from listing to listing. Why is that?
A: If a listing does not have that type of information, the icon will not display in the Information Bubble, or be shaded on the left side of the screen. For example, if a listing does not have any Attachments, the Attachment icon will not display on the Information Bubble. It will also be shaded on the left side of the screen when looking at a Detailed Report.

Q: Do I have to return to the Results page to view the next listing?
A: No. Click on the ML# of the first listing you wish to view. In the center of the bottom of the page are left and right arrows you can scroll through the listings. You can select and de-select listings from here.

Q: Can I only select listings from the Results page?
A: No. In the center of the bottom of the page is a Select box where you can select and de-select listings.

Hotsheet

Q: How can I run a Hotsheet with a specific time stamp instead of just running a Day's Back?
A:
1. Hover over the Hotsheet in the tool bar.
2. Click on the Personal Hotsheet option.
3. Enter the criteria you are looking for and click the Count button.
4. Once the count comes up, click the Results button. This will create a time stamp for you.
5. The next time you run the Personal Hotsheet, it will only go back to the time stamp.

Q: Is there a way for me to pull up my last Personal Hotsheet?
A: Yes.
1. Hover over the Hotsheet in the tool bar.
2. Click on the Personal Hotsheet option.
3. In the Hotsheet Type box, select the Previous Personal Hotsheet.
4. The second to the last time stamp HotSheet will appear.

Q: Is there a way to customize the Today's Hotsheet on the Home Page?
A: Yes. Click on the link Change My Criteria. Here you will change the information that is displayed automatically on the Home Page for the Hotsheet.

Q: I've been out of town for several days. Is there a way to run a Day's Back search for more than 2 days?
A: Yes.
1. Hover over the Hotsheet in the tool bar.
2. Click on the Days Back Hotsheet option.
3. Select the number of days back you wish to run.
4. Click on the Count button, then Results to view the listings.

Q: The count shows 127, but the results are only displaying 30. Why are these different?
A: The count for the Hotsheet includes all the different Sections of the Hotsheets, for example, New Listings, Price Changes, etc. To change to a different section, click the down arrow in the Sections box in the top right corner of the window.

Q: How can I change the column headers on my grid?
A: Select the Column Manager from the Action menu in the bottom left corner and click the green arrow. Name your grid and make the selections you wish to add or remove.

Q: Can I change the size of the column headers in my grid?
A: Yes.
1. Place your cursor between two column headers.
2. Your cursor will change from the arrow to an adjustable icon. Click on the column header.
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Q: I noticed the icons in the Information Bubbles and the left side of the screen are not always the same from listing to listing. Why is that?
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Q: I wish to select all the listings at once. How can this be done?
A: Click the check mark column header. This will select all of the listings at once. If you wish to de-select all of the listings, click the box again.

Q: How can I view a preview listing report?
A: Click anywhere on that line from the grid. This will open the Preview box. Click again on the line to close the Preview box.

Q: How do I export listing data to a text file?
A:

1. After completing a search, select the listings you wish to export from the Results page.
2. From the Action drop-down menu select Export Data and click the green arrow button.
3. Under Select Records to Export you can choose either Selected Records or All Records. Click Next.
4. Under Data Export Format, choose the format you desire. Your choices are: Comma Delimited, Tab Delimited or Pocket Real Estate. You can also choose to compress the data. Click Next.
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A:

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3. Select the listings you wish to see and click the Details button.
4. You can select different reports to view by selecting from the Reports drop-down menu located at the top left corner.

Identity Sharing

Q: Who can I share my Identity with?
A: Any member that is in the same firm as you are in.

Q: If my assistant assumes my identity, while editing a listing, which is recorded as the editor?
A: The person physically logged into MLXchange is the one that is recorded as the editor. If the assistant is logged in and assumes identity, then the assistant is the one recorded as the editor.

Q: How do I add some one, to give them access to my listings and clients?
A: Click on the link on the Home Page of Signed in as:. This will bring up a dialog box with the option to Create a new shared identity. Select the person within your office you wish to grant access to your listings and clients.

Q: How do I remove someone from having access to my listings and clients?
A: Click on the link on the Home Page of Signed in as:. This will bring up a dialog box with the option to Delete selected shared identity. This will remove the link between you and the other person within your office.

Q: Is there a limit to how many people I can give access to?
A: The only limit is the amount of people within your firm.

Q: Can I automatically log in as the person I am assuming identity?
A: You have to log in as yourself, but you can make the Assume Identity dialog box automatically appear as soon as you log in. Check the box to Show Sign-In As option when I log in. Each time you log in, this dialog box will appear so you can select the person you need to assume identity.

Printing and Emailing Reports

Q: How do I adjust the overflow page with printing a report?
A: Within Internet Explorer (IE), go to File and then Page Setup. Remove the header and footer and change margins to .25 on all sides. This step will allow up to 1 additional inch of width and depth of printed page.

Q: How do I print a statistical report?
A:

1. Click on Reports from the Navigational Toolbar.
2. On the Reports menu, and then select Statistical Reports.
3. Select the type of statistical report you want.

4. Select View Report from the Actions drop-down menu and click Go.
5. After the report displays, click the Print button located on the lower right corner of the screen.

Q: How do I print a listing report for a client?
A:
1. Select the Search from the Navigational Toolbar.
2. Enter the desired criteria for your search and click Results.
3. Select the listing(s) that you wish to print and click the Details button.
4. Click the print button in the lower right corner. The Print dialog box display.
5. Select which property option you wish to print, either Single Property or All Properties.
6. Select the report you wish to print from the drop-down list. Click OK.

Q: How do I email listings to a client?
A:
1. After completing a search, select the listing you wish to send from the Search Results screen or the Details screen.
2. Select Send Email from the Action menu at the bottom of the page and click on the green arrow.
3. The next screen will allow you to select the type of report you would like to email. You can also choose between the Selected Listings or All Listings. After you have made your selections, click OK.
4. In the next screen you can either type the email address into the To: field or select a client from your Client Manager to send the email to. You can also type in a subject land and customize the body of the email message. Note: <u>Do not delete any of the message that is already in the body of the email as this is very important for your client.</u>
5. After you have entered all required information, click the Send button.

Export

Q: How do I export listing data to a text file?
A:
1. On the Results page (after completing a search), select the listings you wish to export.
2. From the Action drop-down menu select Export Data and click the green arrow button.
3. Under Select Records to Export you can choose either Selected Records or All Records. Click Next.
4. Under Data Export Format, choose the format you desire. Your choices are: Comma Delimited, Tab Delimited or Pocket Real Estate. You can also choose to compress the data. Click Next.
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A:
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2. From the Action drop-down menu select Export Images and click the green arrow button.
3. Under Select Records to Export you can choose either Selected Records or All Records. Click Next.

4. Make sure you remember where you save the file.

Q: How do you change the short summary view of a listing in the grid or results view? (This is the report that comes up when you click on a listing after getting results)
A:
1. Click on Settings, click on Personalize and then click Personal Defaults.
2. Select a different report from the drop-down menu next to Short Summary View.
3. Click the Save button after this has been changed.
4. Note: Make sure that you change the Property class where it says: "Select a subtype to set a default search, grid and view" as needed so that each property class can have the same view.

Q: What devices are compatible to sync with to export my clients?
A: Outlook, Palm Devices, Blackberry and Treo

Q: What is the Synchronization Tool Download?
A: This allows you to synchronize your Appointments, Tasks and Client Contacts with Microsoft Outlook. When you create new contacts or set up appointments and tasks, the information will be fully synchronized between Outlook and MLXchange.

Q: How does the Synchronization Tool work?
A: Simply download and install the MLX Professional Synchronization Tool on your computer. Specify whether you want one way or two way synchronization.
- <u>One way</u> – If you want to synchronize your data one way only, from Outlook to MLXchange where no information from MLXchange will transfer to Outlook, then you can select this option. Or you can synchronize your data from MLXchange to Outlook where no records are transferred from Outlook to MLXchange.
- <u>Two way</u> – Two way synchronization transfers records both ways between MLXchange and Outlook.

You can also select which types of data to synchronize such as appointments only or contact and appointments only or all data options.

Q: How will Synchronization benefit me?
A: MLX Professional Synchronization Tool provides a quick and easy way of managing, sharing and synchronizing your data between Outlook and MLXchange. After a few clicks, your selected information will be synchronized each time you make a change or update. And when you don't have access to Outlook, you can still access your Outlook Appointments, Tasks and Client Contact information within MLXchange.
Q: Do I use a password from my SafeMLS Token when logging in?
A: No. This is the password from the MLXchange system.

Q: What is the URL I need to enter when trying to Synchronize with Outlook?
A: The URL is http://actris.mlxchange.com.

Q: My appointment did not transfer from Outlook to MLX. Why?
A: For Calendar items to transfer, they must have a description of the item.

Q: Why does the record count differ between MLXchange and Outlook?
A: MLX Pro Synchronization Tool will not transfer duplicate records from Outlook, so few records would show in MLXchange. The Tool with not transfer blank records from Outlook, so fewer records would show in MLXchange.

Q: Do I have to manually update the synchronization between Outlook and MLXchange?
A: No. After the initial synchronization, both Outlook and MLXchange will recognize any new information and automatically update the information.