interealty

MLX professional

Getting Started Guide for existing MLXchange Users

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Cont.

Getting Started

The following document is not intended to be a complete user guide. The information below is provided for your convenience to help you with your transition from MLXchange to MLX Professional, and only highlights the different functionality between the two programs. For a complete user guide, visit the resource section of www.Interealty.com or the Help section of MLXchange. Be sure to download the **MLXchange V1.6 with MLX Professional** user guide.

Subscribing to MLX Professional

Once you have logged in to MLXchange, to subscribe to MLX Professional follow these steps:

1. From the MLXchange home page, click the **Professional Upgrade** link. The Billing and Subscription Services page appears. If the link is not available on your Home Page, go to **Settings**, **Personalize**, **MLXchange Add-On's**.
2. Select **MLXchange Professional** and click **Continue**. The Terms of Use and Privacy Policy page appears.
3. Read through the license agreement and click **Yes** to indicate your agreement and continue. The Credit Card and Billing Information page appears.
4. Enter your payment and billing information. When your purchase is complete, a receipt will be sent to the e-mail address you provide on this screen.
5. **Continue**. The Purchase Confirmation page appears.
6. Review the details of your order and click **Purchase** to finalize your order. Click **Continue** to proceed to the Enter User Information page.
7. Choose your MLX Professional e-mail address and fill out the rest of your user information. The information you provide on this page will be used throughout MLXchange, including your Agent Web Site and e-mail template merge codes.

NOTE! You can NOT change your MLX Professional e-mail address after this point, so make sure you choose one you will be happy with. All other information on this page can be changed later under **Settings.**

The more you use your MLX Professional e-mail address, the more you'll get out of the system. In conjunction with your Agent Web Site, this e-mail address enables many of MLX Professional's most powerful features, such as new lead notification via cell phone or pager and the automatic creation of contact records. By using this e-mail address for your client communications, MLX Professional is able to automatically associate incoming e-mail messages with the appropriate Client Records.

8. Click **Save**. The Thank You page appears.

9. If you want to set up your Agent Web Site immediately, select the **Configure Web page** option. It's recommended that you review the training guide and the online training before setting up your Web page. You can set up your Web page later by going to **Settings**, **Personalize, Agent Web Page Setup**.

10. Click **Continue** to complete the process and to begin using MLXchange with all the additional features of MLX Professional.

MLX Professional Home Page

The MLXchange home page is the first screen to load when you log in to MLXchange. Your MLX Professional subscription will add the following features to your MLXchange Home Page:

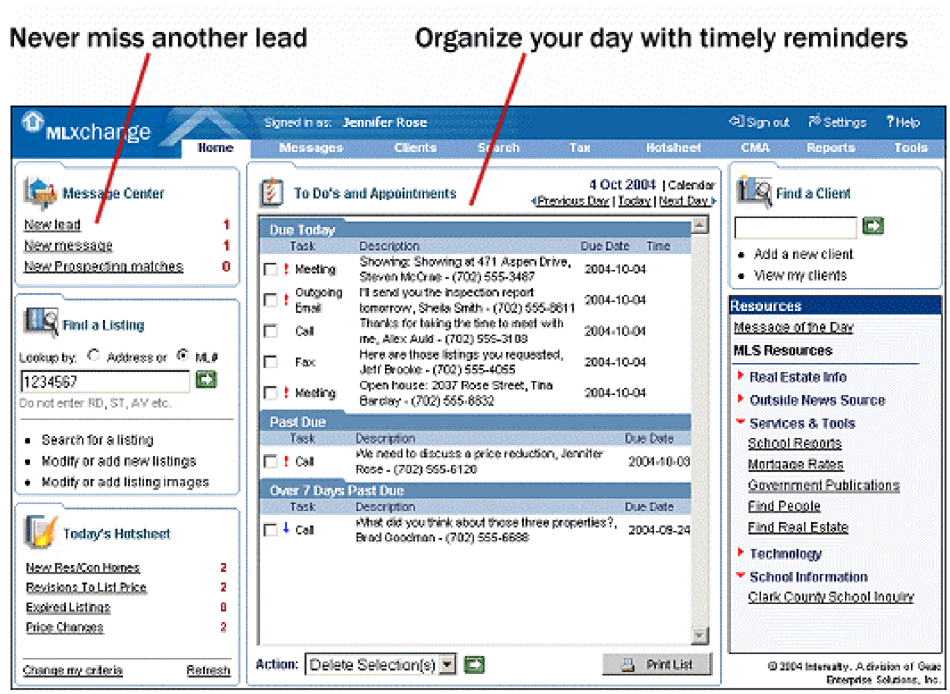
The Message Center on your Home Page

- For MLX Professional subscribers, the Message Center displays information regarding the number of new leads and new messages you have received, as well as the number of new or changed properties that match your prospecting searches.

- New leads are created when prospects request more information on a property on your Agent Web Site or when another agent in your office assigns a client record to you. Clicking **New leads** opens the Client Manager page with the just new leads displayed. For more information, refer to the Client Manager section.

- Clicking **New messages** opens the Messages page with only new messages displayed. Once you read and save the messages, they will be archived in the Client History section of their respective Client Records. For more information, refer to the Messages section.

- Clicking **New Prospecting matches** opens the Prospecting Manager screen and shows the number of new matches found for each prospecting search. For more information, refer to the Search Manager section.



The "To-Do's and Appointments" Area

- For MLX Professional subscribers, the home page shows a list of **To-Do's and Appointments** that summarizes your scheduled tasks, both due and overdue.

- A task appears in the **Due Today** section only on the day it is due. When you click **Next Day** and **Previous Day**, or when you choose a different day to view using the Calendar, different events will be displayed according to their due date.

- The To Do List displays all of your current and past-due client-related tasks. To view the details of a task, simply click on the appropriate row to display the task's information. From the task screen, you can add additional details and comments, and schedule another follow-up task for a future date.

- For more information on scheduling tasks, refer to the Client Manager section.

Message Center

MLX Professional's Message center provides a consolidated view of inbound e-mail messages. From the Message center, you can read and respond to new e-mails, and associate e-mail addresses with specific clients so that received messages are automatically added to the appropriate client's History.

Reading and Responding to E-mail Messages

When someone sends an e-mail message to your MLX Professional e-mail address, the New Messages counter on the MLXchange Home page increases.

Messages sent from your clients to your MLX Professional e-mail address are automatically matched up with the appropriate client record and added to the Client History, making it easy for you to keep a complete record of all your customer communications in a single location.

To read an e-mail message:

1. Click the **Messages** main menu item or click **New messages** on the Home page. The Messages page appears. All e-mail sent to your MLX Professional e-mail address appears on the Messages page.

2. Click anywhere on a message to read it. The Read E-mail window appears.

To respond to an e-mail message:

1. From the Read E-mail window, click **Reply** or **Forward**. The Send Email window appears. If you chose to **Reply**, the sender's e-mail address automatically appears in the **To** field.

"Cc" stands for Carbon Copy and "Bcc" stands for Blind Carbon Copy. Blind Carbon Copy recipients are not revealed to other message recipients.

2. Click the text to the right of the address fields to select any additional clients or MLS members to whom you want to send the message. (Alternatively, you can simply type additional e-mail addresses in the appropriate field, separated by semi-colons.) The Select Clients or Members window appears.

3. Choose the kind of e-mail address records you want to **Search for**: Clients or Members.

4. If you are looking for clients addresses, you can quickly locate a client by typing their name in the field. If you are looking for MLS member addresses, you must enter a first name, last name, or office code and click **Find**.

5. Select the contacts in the list that you want to send the e-mail message to and click either **To**, **Cc**, or **Bcc** to add them to the appropriate address field. You can select multiple contacts by holding down the Ctrl or Shift key while you click.

6. Click **OK** to add the selected contacts to the list of e-mail recipients and return to the Send E-mail window.

7. Type the message's **Subject**.

8. Type your **Message**. Alternatively, MLX Professional users may select an **E-mail template** from the list to pre-populate the **Message** field. Refer to the Settings section for more information on creating e-mail templates.

9. If you want to create a follow-up activity, select **Schedule a follow-up** and choose the activity type from the list. When the e-mail has been successfully sent, you will be prompted to enter the details of the follow-up task.

10. Click **Send**. You are notified when the e-mail message has been successfully sent.

To view, forward, or delete messages that you have sent, open the Client Record and click Client History.

Associating E-mail Messages with Clients

When a new e-mail message arrives, MLX Professional assigns it a Matched status and links it to a Client Record if the sender's e-mail address matches an existing client's e-mail address. If the program does not recognize the sender's address, it assigns the message an Unmatched status.

Since most people have more than one e-mail address, you will sometimes need to associate a new, Unmatched e-mail message with an existing client record.

To associate a message with a client:

1. On the **Messages** page, select the unmatched message from the list, select **Associate** from the Action list and click the arrow button. The Associate Message to Client page appears.

2. Select the client from the list with whom you want to associate the e-mail message. If you want to make changes to the client record at this point, or if you realize that you do not yet have a Client Record for this contact, you can use the **Edit client** and **Add client** commands as appropriate.

3. If you want all future messages from this e-mail address to be automatically associated with the selected client, choose the **Associate all future messages** option. (You may not want to choose this option if, for instance, the client is temporarily using a friend's e-mail.)

4. Click **Associate** to complete the process.

Client Manager

The Client Manager is a powerful tool for working with your list of contacts. Using the Client Manager, you can sort and display contact information any way you want, making it easy to locate the clients you want to work with. From the Client Manager, you can quickly import, export, delete or send e-mail to a group of clients. With MLX Professional, you can also view and modify different list formats (column layouts), filter by Contact Type and Status, merge duplicate Client Records, reassign clients to other users, change the status of multiple client records simultaneously, quick search by first or last name, and perform advanced client searches using MLXchange's configurable Search Criteria screen.

Adding New Clients

The Client list on the Client Manager page displays a summary of all the different contacts that exist in your client database. You can enter client information manually, but you can also import client information from other sources such as Microsoft Outlook or Top Producer. For MLX Professional users, client information is also added automatically whenever a prospect electronically inquires about a listing on your Agent Web Site.

To add a new client:

1. Click the **Clients** menu item near the top of the screen. The Client Manager page appears.
2. Click **Add New Client.** The Add a New Client window appears. MLX Professional users can also click the **Add a new client** link on the Home page to access this window directly.
3. Enter all known information about your client.
   - **First Name** and **Last Name** are the only required fields, but you should be sure to enter the client's e-mail address so you can send them listing reports.
   - The **Status** and **Contact Type** fields are used to categorize and sort your contacts. You can assign up to eight different contact types to a client record.
   - Use the two fields that have editable labels to store custom information, such as additional phone numbers, Web addresses, etc.
   - If you select **No** for the **Do you want to make the client information private?** option, then other members of your office will also see the client in their Client Manager list. This is useful for sharing local business contacts with other agents.
   - Click **Add a Note** to create a date/time stamp in the notes field, then type the details of the note.

Click **Save** when you have finished entering the contact information. The client's name now appears in the client list. For MLX Professional users, the **New Leads** counter on the home page increases by one if you assigned the contact a Status of **New**.

Changing the Client List View

The MLX Professional Client list can be quickly and easily sorted, rearranged, and filtered to display your client information in the manner that suits your needs best.

To change the Client list view:

1. Click on a row to see an expanded preview of the Client Record. Click the row again to hide the preview.

2. To sort the list, click on a column header. Click the same column header again to reverse the sort order.

3. To view different columns of information, select an option from the **Grid** list. Refer to the section below for instructions on creating a new column layout.

4. To filter the list of clients, select an option from the **Contact Type** and/or **Status** lists. Only those contacts with the matching Contact Type and Status are displayed.

5. To filter the list by selection, first select any number of clients from the list. Now select an option from the **Selection** list. If you choose **Show selected**, only the selected clients are displayed; if you choose **Show unselected**, only the clients that are not selected are displayed.

> You can make hidden clients reappear by clearing any filters that you have applied.

Creating New Column Layouts

MLX Professional allows you to create custom column layouts (or "grid views") for the Client list that will let you present your client data any way you want. This feature is particularly useful for preparing custom export formats.

To create a new column layout:

1. On the Client Manager page, select **Column Manager** from the Action list and click the arrow button. The Column Manager page appears. (Refer to the Search Manager section for a complete description of the functionality of this screen.)

2. To create a new column layout from scratch, click **Create new column report**. To create a new column layout using from an existing column layout, select a column layout from the list and click **Copy**. The Column Manager Edit page appears.

3. Select the field(s) that you want to appear in the column layout from the **Available grid fields** list and move them to the S**elected grid fields** list by clicking the left arrows.

4. To remove a field, select the unwanted field from the **Selected grid fields** list and click the right arrow.

5. Change the order of the selected fields by selecting each field and clicking the up/down arrows. The uppermost field will appear as the far left column; the bottommost field will appear as the far right column.

6. When you are satisfied with the list of selected fields and their order, click **Finish**. The new column layout name now appears in the **Grid** list.

Searching for Clients

MLX Professional provides two convenient ways to search for clients from the Client Manager page: a quick search and an advanced search.
To quick search for a client:

1. On the Client Manager page, type the first name and/or last name of the client you want to find in the **Search for a client** field and click the arrow button. The Client list now displays just those records that contain the name you entered.

2. To display all clients in the Client list again, clear the **Search for a client** field and click the arrow button again.

To search for clients using the Advanced Search:

1. On the Client Manager page, click **Advanced Search** near the top right corner of the screen. The Advanced Search page appears.

   The Advanced Search page has the same functionality as the MLXchange listing Search Manager. Refer to the Search Manager section for a complete description of the functionality of this screen.

2. Enter the search criteria in the fields. As you enter criteria, the **Matches found** area shows you how many clients match your search criteria.

3. Click **Results** to see the list of matching clients on the Client Manager page, or click **Details** to jump directly to the matching Client Records.

Sending E-mail Messages

From the Client Manager page, you can send the same e-mail message to two or more clients simultaneously.

To send an e-mail message to a client:

1. On the Client Manager page, select the clients to whom you want to send the e-mail message.

2. Select **Send Email** from the Action list and click the arrow button. The Send Email window appears. The selected clients' e-mail addresses automatically appear in the **To** field.

> Cc means "Carbon Copy" and Bcc means "Blind Carbon Copy." Bcc recipients are not visible to other message recipients, which is ideal when sending bulk e-mails to prospects.

3. Click the text to the right of the address fields to select any additional clients or MLS members to whom you want to send the message. (Alternatively, you can simply type additional e-mail addresses in the appropriate field, separated by semi-colons.) The Select Clients or Members window appears.

4. Choose the kind of e-mail address records you want to **Search for**: **Clients** or **Members**.

5. If you are looking for client addresses, you can quickly locate a client by typing their name in the field. If you are looking for MLS member addresses, you must enter a first name, last name, or office code and click **Find**.

6. Select the contacts in the list that you want to send the e-mail message to and click either **To**, **Cc**, or **Bcc** to add them to the appropriate address field. You can select multiple contacts by holding down the Ctrl or Shift key while you click.

7. Click **OK** to add the selected contacts to the list of e-mail recipients and return to the Send E-mail window.

8. Type the message's **Subject**.

9. Type your **Message**. Alternatively, MLX Professional users may select an **E-mail template** from the list to pre-populate the **Message** field. Once you select a message template, you can modify the message without affecting the template itself. Refer to the Settings section for more information on creating e-mail templates.

10. If you want to create a follow-up activity, select **Schedule a follow-up** and choose the activity type from the list. When the e-mail has been successfully sent, you will be prompted to enter the details of the follow-up task.

11. Click **Send**. You are notified when the e-mail message has been successfully sent.

> To view, forward, or delete messages that you have sent, open the Client Record and click Client History.

Viewing Client Records

The Client Record provides a consolidated view of a client's contact information, correspondence history, saved searches, CMAs, and buyer presentations. MLX Professional users can also see completed tasks, schedule new Appointments and To-Dos, and add listings to the client's Property List.

To view a client record:

1. On the Client Manager page, select the clients you want to view from the Client list. To view all clients, do not select any records.

2. Click **Details**. The Client Record page appears.

3. The Client Record groups information into several expandable sections: Client Information, Client History, Search History, and CMA/Presentation. Additionally, MLX Professional users can view Scheduled Client Interaction and the client's Property List.

4. Click the section title to expand the section for viewing. Click the section title again to hide the contents of the section.

5. If you selected to view multiple client records, they will be loaded in an electronic "rolodex." To view different client records, select a client from the list at the bottom of the screen, or click the arrow buttons to move from one record to the next.

6. To view the Client Information in a different report format, select a different format from the **View** list.

7. To remove a record from the group of clients you are currently viewing, click **Discard**.

Don't worry - using the **Discard** button will NOT delete the client record.

8. To return to the Client Manager, click **Manager**.

Scheduling Client-Related Tasks

To schedule a new client-related task:

1. On the Client Record page, select either **Add New To-Do** or **Add New Appointment** from the Action list and click the arrow button. The New To-Do or New Appointment window appears.

2. Enter the details of the activity. For an Appointment, enter a **Start** date/time, an **End** date/time, and a **Location**. If you are entering a To-Do that has already been completed, you can choose to **Schedule a follow-up** event immediately.

3. Click **Save** to create the task and return to the Client Record. The task appears in the Scheduled Client Interaction section. If you chose to create a follow-up activity, you are prompted to enter the details of the task immediately.

To-Dos automatically move to the Client History section when marked complete; Appointments moves to the Client History section when their End date/time has passed.

Tasks that are associated with a specific client are automatically displayed on the client's Private Client Web Page.

Adding Listings to a Property List

The **Property List** is a place where you can keep track of all the properties a client is interested in, recording their interest level and making detailed notes as required.

To add listings to a client's Property List:

1. On the Client Record page, click and expand the **Property List** section.

2. Select **Add Properties** from the associated Action list and click the arrow button. The Search Criteria page appears.

3. Enter the appropriate search criteria to locate the desired listing(s) and then click **Results** to execute the search. The Search Results page appears.

4. Select the listings you want to add to the client's Property List, select **Associate to Client** from the Action list, and then click the arrow button. When you return to the Client Record, the selected listings now appear in the client's Property List.

> Listings that are added to a client's Property List are automatically displayed on the client's Private Client Web Page.

5. To record additional information about these listings, select the listings from the Property List, then select **View Details** from the associated Action list and click the arrow button. The Listing Detail page appears.

6. At the top of the page just under the main menu, click the text that says **Property is being watched for [client name]** to expand the section.

7. You can now assign the property to a specific **Group** (e.g., "for Investment," "for Primary Residence", etc.), indicate the client's **Interest Level** in the property, whether or not it has been shown to the client, etc. You can add and edit the groups by clicking **Add/Edit group**, and can enter any additional **Comments** regarding the client's interest in the property.

8. Click **Client Record** to return to the Client Record.

Merging Duplicate Records

To merge duplicate Client Records:

1. On the Client Manager page, select two or more clients from the list that you want to merge into a single Client Record.
2. Select **Merge** from the Action list and click the arrow button. The Merge Clients dialog box appears.
3. Select the client from the list into which the other client records will be merged.

> The contact information for only the selected client will be retained; any unique contact information in the Client Records that you do NOT select will be permanently deleted. The Scheduled Interactions, Client History, Search History, Property List, and any CMAs and presentations from the other clients will be added to the selected client's Client Record.

4. Click **OK** to complete the merge procedure.

Changing Client Status

To change a client's status:

1. On the Client Manager page, select the clients from the list whose status you want to change.
2. Select **Change Status** from the Action list and click the arrow button. The Change Status dialog box appears.
3. Select a status from the list and click **OK**. All of the selected clients are assigned the selected status.

Reassigning Clients

MLX Professional users can reassign clients to other MLX Professional users within the same office. This causes the client to disappear from your Client list and appear within the other user's Client list.

To reassign a client to another user:

1. On the Client Manager page, select the clients from the list that you want to reassign to another user (i.e. your partner or assistant).
2. Select **Reassign** from the Action list and click the arrow button. The Reassign Clients dialog box appears.
3. Select the name of the user from the list to whom you want to reassign the selected clients.

> Standard MLXchange users and users from outside your office will not appear in the list of users.

4. Click **OK** to reassign the clients. If the clients are designated as Private, they no longer appear in your Client list.

Private Client Web Sites

The private client Web pages can be used as a customer service portal for your existing clients, as well as a powerful tool for convincing prospects to choose you as their agent. Your Agent Web site template will be used for your Private Client Web sites, so be sure to review the **Setting Up Your Agent Web Site** section of this guide.

Presentations

All of the listing presentations associated to a client will automatically appear on their Private Client Web Page.

Client Property List

All of the properties that you have associated to a client will automatically appear on their Private Client Web Page.

Scheduled Interactions

The Scheduled Interaction section shows any uncompleted tasks so clients are kept abreast of upcoming showings, appointments, etc.

Client History

The Client History section shows completed tasks, reinforcing the value of your services by clearly showing everything you've done for your clients to help them buy or sell a home. Note that only the event's date, type, and Subject (topic) are shown on private client pages, so make sure you enter a good, descriptive subject when you add new events to your task list in MLX Professional (e.g., "Ad placed in the Times, page D13").

To preview a Private Client Web site:

1. On the Client Manager page, select the client you want to view from the Client list.
2. Click **Details**. The Client Record page appears.
3. Select **Preview Client Website** from the Action list and click the arrow button. The Private Client Web site appears in another browser window.

E-mailing the link the Private Client Web site:

1. On the Client Manager page, select the client you want to view from the Client list.
2. Click **Details**. The Client Record page appears.
3. Select **Email Private Link** from the Action list and click the arrow button. The E-mail Dialog box appears.

Search Manager

Using the MLXchange Search Manager, you can create, save, and reuse searches by saving the search criteria and associating them with a client. **MLX Professional gives you the ability to create property lists for your clients.**

Creating a Property List

A property list is a group of properties that are associated with a specific client. Property lists are often created as a way to keep track of properties in which your clients are interested.

To create a property list for a client:

1. From the Search Results page, select the listings you want to add to the property list.
2. Select **Associate to Client** from the Action list and click the arrow button. The Select Clients to Associate window appears.
3. Select the client to which you want to associate the properties and click **OK**. Properties that are part of a property list are marked with a small red flag on the Search Results page.

   You can view and work with a client's property list from the Client Record. For more information, refer to the Client Manager section.

E-Mail Templates

With MLXchange, you can customize a wide range of program settings, including your contact information, favorite reports, default search templates, and home page resource links. **MLX Professional gives you the ability to create an E-mail template liabrary**, which will held save time and keep your messaging consistent.

Adding E-mail Templates

E-mail templates allow MLX Professional users to quickly reply to common inquiries without typing the same message each time. The ability to merge contact and listing data also makes e-mail templates ideal for sending mass e-mails to your prospects and past clients.

To add a new e-mail template:

1. Click **Settings** in the upper right corner of the screen. The Settings page appears.

2. Click **Personalize** to expand the section, and then click **E-mail Templates**. The E-mail Templates page appears.

3. To create a new e-mail template from scratch, click **New**. If you want to create a new e-mail template from an existing template, select a template from the list and click **Copy**. You can also edit an existing template by selecting it and clicking **Edit**. The Edit E-mail Template page appears. *Note: System templates can not be edited.*

4. Type the e-mail message in the main text box. At any time, you can select a client or listing merge code from the list and click **Add** to insert it in the message.

When you send a message using an e-mail template, the appropriate contact or listing information is substituted for each merge code the template contains. If the Client or Listing Record does not contain the information the merge code needs, the merge code will show nothing.

5. Type the **Template name**.

6. Click **Save** when you are satisfied with the template. The template can now be selected from the **E-mail template** list whenever you create a new e-mail message.

Other System Settings That You Can Change

1. Click **Settings** in the upper right corner of the screen. The Settings page appears.

2. Click **Personalize** to expand the section. From here you can:

   - Change your personal MLXchange defaults, including your start-up page, helping you work the way that you want to.

   - Add Resource Links to your MLXchange Home Page.

   - Choose your favorite reports, so they're handy every time you do a listing report.

Setting Up Your Agent Web Site

You can easily modify the appearance and content of your MLX Professional Web site using the controls built into MLXchange.

To access the Agent Web Site setup options:

1. Click **Settings** in the top right corner of the screen. The Settings page appears.
2. Click **Personalize** to expand the section, and then click **Agent Web Page Setup**. The Agent Web Page Configuration screen appears.
3. From here, you can perform all the different actions required to set up and customize your MLX Professional Agent Web Site.

The clock icon is displayed beside some options to indicate that changes to these options may take up to one hour to take effect.

Changing Your Site Style

MLX Professional provides several attractive Web site templates to choose from.

To change your site style:

1. From the Agent Web Page Configuration screen, click **Change your site style**. The Style Selection page appears.
2. To browse a style category, click the category name in the **Style Templates** list on the left side of the page.
3. Click a template to select it, and then click **Save**.

While you are working on your Web site, you can preview it at any time by clicking the **Preview** button located in the top and bottom corners of every page.

Choosing a URL for your Agent Web Site

Your Agent Web Site's URL is comprised of a secondary domain that is prepended to your board's primary MLXchange domain. For example, if the Web address (URL) for your board's MLXchange domain is "http://mls.mlxchange.com," your URL will add something new between the "http://" and the "mls.mlxchange.com." For example: "http://StaceyJones.mls.mlxchange.com."

In this procedure, you will choose the customizable portion of your Web site's URL.

> To help drive traffic to your site, it is a good idea to include your site's URL on all business collateral, including yard signs, flyers, ads, business cards, and e-mails. It is important to make sure you choose a URL that you are happy with because if you change your URL after using it for a period of time, people will be unable to find your site and any links to your site will be broken.

To choose your Web site's URL:

1. From the Agent Web Page Configuration page, click **Web site domain**. The Domain Setup page appears.
2. Enter your **Web page URL Prefix**. This is the text that will define the personal portion of your Web site's URL. This might be your name, nickname, or anything distinctive.
3. Click **Advanced Options** to access features that will make it easier for Internet search engines to find your site and/or to redirect traffic from an existing site to your MLX Professional Agent Web site.
4. Enter your **Web site Title**, **Description** and **Keywords**. The values you enter here will be used as meta tags within the HTML code of your Web site.
5. If you have an **existing Web site domain name** and you want to automatically redirect traffic from it to your MLX Professional Agent Web Site, enter the URL in the field provided.

   Note: You must also ask your domain registrar to redirect visitors from your domain to your MLX Professional Agent Web Site. (Your domain registrar is the company that sold you your domain name.) If you administrate your own domain, you can set up the redirection yourself using one of three methods:

1) The preferred method is to add a CNAME record to your zone file that points your subdomain (e.g., "www.realtysuperstar.com") to the MLXchange Web Site "mls.mlxchange.com." Do NOT point to your secondary domain (e.g., "StaceyJones.mls.mlxchange.com"). This option can usually be found under advanced domain settings. Please contact your registrar if you cannot locate this option.

2) If method 1 is not available to you, then you should be able to simply forward your own domain to your Agent Web Site at "StaceyJones..mls.mlxchange.com" (for example). The disadvantage of this method is that "StaceyJones.demo.mlxchange.com" will appear in the browser address bar, not your own domain name.

3) Some domain registrars offer the option to "frame" your domain forwarding so your domain name (e.g., "www.realtysuperstar.com") will appear in the browser address bar. In other respects, this option is essentially the same as option 2. This is not a desirable method, however, because it prevents site visitors from book marking specific pages within your site.

6. When you have finishing entering your domain information, click **Save**. You now have a Web site!

Using Your IDX Search and "Contact Me" Links

Your MLX Professional subscription comes with two powerful features that are commonly misunderstood and unused. The IDX Search Link (where available) and the "Contact Me" link. Both of these links can be found on the **Web site domain** section of your Agent Web Page Configuration screen.

If available, the IDX Search Link feature may require an additional monthly or annual fee. Contact your MLS to check for availability.

The IDX Search (If available in your area)

If your board has enabled this option for MLX Professional subscribers, you or your Webmaster can easily add a listing search to any Web site (not just your MLX Professional Agent Web Site) that will automatically direct leads to your MLX Professional inbox.

If you know a little bit of HTML, you can easily add the IDX search to a Web site by using the IDX SearchLink URL provided by MLX Professional. For example:

Click here to Search the MLS!

Anyone who clicks the link will be presented with the full IDX search interface, and if they ask for more information, the request will end up in MLX Professional as a new lead.

The "Contact Me!" Link

MLX Professional provides advanced lead capture and management tools. The "Contact Me!" link is designed to replace your e-mail links on any other Web sites that you may have in order to channel leads through those tools.

The difference between the "Contact Me!" link and an ordinary e-mail link is that every e-mail sent via the "Contact Me!" link will be funneled into your MLX Professional inbox and result in the automatic creation of a new client record.

Your personal "Contact Me!" link can be added to any Web page using very simple HTML like this:

Click here to send me an E-mail!

Managing Your Web Site Pages

Your Agent Web Site consists of a number of pre-defined pages that can be displayed, hidden, and individually customized.

To customize the home page:

1. From the Agent Web Page Configuration page, click **Manage your web pages**. The Manage Pages screen appears.

2. The page is divided into a number of different sections, letting you edit the content while the program takes care of the formatting. To entirely remove (i.e., hide) a section from the page, deselect the check box beside the section name. Only sections with a check mark will be displayed.

3. To change the title at the top of the page, enter a new **Tag Line**. To choose from a list of pre-written tag lines, select one from the adjacent list or click **Prev** and **Next** to browse through the available tag lines.

4. To show a featured property on the home page, enter the listing's **ML Number**. If you have multiple featured properties that you want to display, click the **Cycle through Featured Properties** option and then enter different **ML Numbers** in the list, one per line. (When this option is enabled, a random listing from the list will be selected for display each time the home page loads.) To add text beneath the featured property, enter your **Sales pitch**.

5. The rest of the page consists of a number of sections for entering free-form text. You can enter your own text or choose from the lists of pre-written content. Click the **Prev** and **Next** links beside the lists to browse through the content.

6. To apply formatting to the free-form text, use the cursor to highlight a section of text, and then click the formatting buttons above the field to make the text bold, italic, underlined, bulleted, numbered, or to insert a hyperlink.

7. For a completely customized look, you can use the Advanced Home Page Editor. To use the advanced editor, click **Show advanced mode** near the top right corner of the page. The Manage Pages screen reloads to show the advanced editor.

8. You can use the advanced editor's word-processor-like controls to quickly and easily create a completely custom home page. For even greater control, you can click **HTML** at the bottom of the page to edit the home page's HTML code.

9. To return to the easy editor, click **Use Easy mode**.

10. Click **Save** when you have finished editing your MLX Professional Agent Web Site home page.

To customize the Featured Properties page:

1. From the Agent Web Page Configuration page, click **Manage your web pages**. The Manage Pages screen appears.

2. To edit the Featured properties page, click **Featured Properties** in the navigation menu on the left side of the screen.

3. To change the name of the page as it appears in your Web site's navigation menu, enter a new **Menu title**. If you do not want to show this page at all on your Web site, deselect the check box to the right of the Menu title.

Pages that are not currently included in your Web site show a red "X" beside the page name in the navigation menu on the left side of the screen.

4. To change the title at the top of the page, enter a new **Tag Line**. To choose from a list of pre-written tag lines, select one from the adjacent list or click **Prev** and **Next** to browse through the available tag lines.

5. To add listings to the "Currently for Sale" section of the Featured properties page, enter ML numbers in the list, one per line. If you do not want this section to appear on your Web site, deselect the check box. You can also change the title of the section if you want, and enter a custom message to display when the section has no listings.

6. To add listings to the "Recently Sold" section of the Featured properties page, enter ML numbers in the list, one per line. If you do not want this section to appear on your Web site, deselect the check box. You can also change the title of the section if you want, and enter a custom message to display when the section has no listings.

7. Click **Save** when you have entered all your featured properties.

To customize other pages:

1. From the Agent Web Page Configuration page, click **Manage your web pages**. The Manage Pages screen appears.

2. Click the page you want to edit in the navigation menu on the left side of the screen. The selected page's information will load.

3. To change the name of the page as it appears in your Web site's navigation menu, enter a new **Menu title**. If you do not want to show the page at all on your Web site, deselect the check box to the right of the Menu title.

> Pages that are not currently included in your Web site show a red "X" beside the page name in the navigation menu on the left side of the screen.

4. To change the title at the top of the page, enter a new **Tag Line**. To choose from a list of pre-written tag lines, select one from the adjacent list or click **Prev** and **Next** to browse through the available tag lines.

5. Select the page sections you want to display and deselect the page sections you want to hide. Enter the section names and text as appropriate, or select from the library of pre-written content.

6. When you are finished editing the page, click **Save**.

Web Site Rules

MLX Professional automatically follows your board's rules and regulations regarding the display of online listing information.

To view the site rules:

1. From the Agent Web Page Configuration page, click **View the site rules**. The Site Rules page appears.

2. There may be one or more site rules or other options you are allowed to override. Click the appropriate check boxes to enable or disable these settings.

3. Click **Save**.

Changing Your Site Branding

MLX Professional makes it easy to add personal contact information and custom photos and logos to your Agent Web Site.

To change your contact information:

1. From the Agent Web Page Configuration page, click **How visitors will contact you**. The My Profile page appears.

2. Make the necessary changes or additions to your contact information.

> You cannot change your MLX Professional e-mail address.

3. When you are finished, click **Save**.

To change Web site images:

1. From the Agent Web Page Configuration page, click **Manage your images**. The My Image Library page appears.

2. To add your picture and company logo to your Web site, select the appropriate images from the **Headshot** and **Company Logo** lists. If the agent photo you want has not yet been added to MLXchange, click **Manage Images**. The image submitter window appears.

3. The window shows a series of numbered instructions to simplify the process of adding and maintaining images.

4. **Select an image slot** from the list. If you choose an image slot that already contains an image, the new image will replace the existing image. To simply delete the image from the selected image slot, click **Delete**.

5. Click **Browse**. A Choose File dialog box appears. Locate and select the image you want to use on your Web site, and then click **Open**. A preview of the image appears.

6. You can now adjust the image in a number of ways:

   - You can change the zoom level by right-clicking and dragging on the image.

- If you have zoomed in, you can pan up, down, left or right by clicking and dragging on the image.

- When you are satisfied with the image, right-click the image and choose **Crop Image as Displayed** from the pop-up menu.

7. Click **Save** to save the image and return to the My Image Library page. You can now select the new image from the **Headshot** list.

8. Click **Save** to save your profile and site branding.

Online Resource Center

Visit the **Resource Center** section of **www.MLXPro.com** for complete user guides, online training, FAQs, and useful Tips & Tricks.

Technical Support

Telephone/E-Mail Support

The Interealty customer support center's standard hours of operation are M-F 8:30 AM - 5:30 PM your local time.

- Toll-free: 1-888-825-5472
- Broward County Members please call: (954) 492-1200
- E-mail at Support@interealty.com

MLX Professional Tips & Tricks

Adding Links to your MLX Professional Website

There are three ways you can add links:

1. You can add links to your Home Page.

2. Advanced users can use the Advanced Mode HTML editor to customize the center area of the Home Page.

3. Turn your Buying/Selling Tips page into a Resource Page. Simply change the title of the section (i.e. Useful Links, Community Information, etc.) and add headings and related links in each section.

To see a sample, visit the "Useful Links" page of: http://sample7.demo.mlxchange.com/.

Promoting Your Agent Web Site

One of the best things about MLX Professional is the fact that you get your own Agent Web Site. Your Web site is great for automatically informing your clients about new property matches, scheduled showings, etc., but it is also an excellent place to showcase your listings. Many prospects are intimidated by the idea that they will get "the hard sell" over the phone, and your Web site provides a non-threatening way to introduce prospects to your services, not only generating leads but also saving you time by answering frequently asked questions.

Optimizing Your Web Site for Search Engines

To make it easier for Internet search engines to find your MLX Professional Agent Web site, click Advanced Options to expand the section. Under Search Engine tools, enter your Web site Title, Description and Keywords.

Tip: The keywords you choose for your website will have a large impact on how your site will perform in search engines. Try to figure out what words you might enter in a search engine to find a site like yours.

Search Engine Submission

In order for the public to find your Web site, however, it's important that you submit it to the most popular Internet search engines. Done manually, this can be a very laborious and time-consuming process. Thankfully, there are several free services on the Web that can automate the process for you. AddMe.com is one example of a site that offers free search engine submission services. If you want, you can choose to pay for more sophisticated search engine submission technology and/or ongoing search engine submission services. Microsoft bCentral, for example, has a product called Submit It! (www.submit-it.com) that starts at $79 per year.

Correspondence and Collateral

Be sure to put your Web site address on all your correspondence and printed materials, including your e-mails, business card, yard signs, CMAs, open house flyers, etc. This is a simple yet often-overlooked step that is key to the successful promotion of your site.

What to Do with an Existing Web Site

If you already have a Web site that draws traffic and generates e-mail leads, you will probably not want to abandon it to use your MLX Professional Web site exclusively. There are a couple of different things you can do to make your existing Web site work with your new MLXchange Professional Web site:

1. *Integrate the two sites*. You can continue using your existing Web site as your home page, and simply add links to it that let Web visitors navigate directly to specific parts of your MLX Professional Web site, e.g., the property search engine (if available) and your featured properties page. You can determine the URL of a specific page of your MLX Professional Web site by right-clicking on the page and selecting Properties from the pop-up menu. The potential drawback to this method is that, if the two sites look quite different, it will be obvious to the visitor that they are navigating between two different sites. This can largely be overcome, however, by framing the content of the MLX Professional Web pages within your existing site template.

2. *Redirect visitors automatically.* MLX Professional allows you to automatically redirect people from your established domain to your MLX Professional Web site while still showing your domain name in the browser's address bar. To do this, enter your domain name in the field provided under Advanced Options in the Domain Setup area of the Agent Web Page Configuration section.

NOTE: After you have done this, you must also ask your domain registrar to redirect visitors from your domain to your MLX Professional Agent Web Site. (Your domain registrar is the company that sold you your domain name.) If you administrate your own domain, you can set up the redirection yourself using one of three methods:

The preferred method is to add a CNAME record to your zone file that points your subdomain (e.g., “www.realtysuperstar.com”) to the MLXchange Web Site “mls.mlxchange.com.” Do NOT point to your secondary domain (e.g., “alanthompson.mls.mlxchange.com”). This option can usually be found under advanced domain settings. Please contact your registrar if you cannot locate this option.

If method 1 is not available to you, then you should be able to simply forward your own domain to your Agent Web Site at “alanthompson.mls.mlxchange.com” (for example). The disadvantage of this method is that “alanthompson.demo.mlxchange.com” will appear in the browser address bar, not your own domain name.

Some domain registrars offer the option to “frame” your domain forwarding so your domain name (e.g., “www.realtysuperstar.com”) will appear in the browser address bar. In other respects, this option is essentially the same as option 2. This is not a desirable method, however, because it prevents site visitors from book marking specific pages within your site. Free Web services are available that will allow you to automatically redirect visitors from your existing site to your new MLX Professional Web site.

Using Private Client Web Pages

While your MLX Professional Web site is great for advertising your listings, it truly excels as a customer communications tool. The private client Web pages can be used as a customer service portal for your existing clients, as well as a powerful tool for convincing prospects to choose you as their agent. Imagine the following scenario:

> MLX Professional forwards a new lead to your pager. Expanding the Property List section of the new client record that the system has created, you see that the prospect is interested in a listing that she saw on your Web site. After looking at the prospect’s preferences, you perform a search and add several similar properties to her Property List for display on her private client page. You quickly preview the Web page and then e-mail the page link to the prospect with the click of a button.
>
> Only a couple minutes after you received the lead, you pick up the phone and call the prospect back: “Hi, Ms. Smith? This is Stacey Jones from ABC Realty. I see that you are

> interested in a property that you saw on my Web site. I've taken the liberty of preparing a list of other properties that might interest you, and I've set up a private Web page for you where you can view these properties when you've got a chance. All you have to do is click the link that I e-mailed to you a few moments ago…."

Of course, MLX Professional's private client Web pages were designed primarily for ongoing customer relationship management. The Scheduled Interaction section shows any uncompleted tasks so clients are kept abreast of upcoming showings, appointments, etc. The Client History section shows completed tasks, reinforcing the value of your services by clearly showing everything you've done for your clients to help them buy or sell a home. Note that only the event's date, type, and Subject (topic) are shown on private client pages, so make sure you enter a good, descriptive subject when you add new events to your task list in MLX Professional (e.g., "Ad placed in the Times, page D13").

Managing Your E-mail

When you start using MLX Professional, you get a new e-mail address. You are allowed to choose the portion of the e-mail address before the "@" symbol. The portion of the e-mail address that comes after the "@" symbol is automatically determined by the name of your MLS board and cannot be changed. For example, if your name is Brad Goodman and Southeast Florida is your MLS, your e-mail might be brad.goodman@sef.mlxchange.com.

The more you use your MLX Professional e-mail address, the more value you will get out of the system. By using this e-mail address for all client communications, MLX Professional is able to automatically associate all correspondence with the appropriate contact record. All e-mail that you send from MLXchange will show this new e-mail address as your return address.

Working with Multiple E-mail Addresses

Your e-mail can be greatly simplified by maintaining just three addresses: a personal e-mail address (e.g., a Hotmail account) for communicating with friends; a business address for communicating with peers, vendors and other business associates; and a second business address for communicating exclusively with clients. This client-oriented e-mail address is the one provided by MLXchange.

E-mail addresses beyond these three are probably unnecessary and should be phased out over a period of time. Make sure you tell the appropriate contacts about any e-mail addresses you plan to discontinue, and the new address where they can reach you. You should continue to check your old addresses for mail for a period of at least two months before canceling the addresses entirely.

E-mail Re-direction and E-mail Forwarding

If you have an existing e-mail address that you really want to continue to use, you may consider using an e-mail forwarding service to redirect incoming e-mail to your new MLX Professional e-mail account. Many Internet Service Providers offer this service for a small monthly fee.

If your e-mail address is with a personal domain (e.g., bob@bobsrealestate.com) it is possible to set up e-mail forwarding to MLX Professional free of charge. MyDomain.com and ZoneEdit.com are examples of Web sites that offer free domain management services, including e-mail forwarding.

To set up e-mail forwarding from your own domain to MLX Professional:

1. You must first set up your domain name so that it will use the chosen domain management service provider for DNS. (DNS is the translation mechanism that changes domain names—which are text—into numbers that web servers can understand.) To do this, log into the control panel of your domain name registrar (i.e., the site where you bought your domain name in the first place).

2. In the control panel, you should find a setting for "Domain Name Servers" or "DNS". This is where you will enter the DNS information for your chosen domain management service provider. In the case of MyDomain, the settings would be:

   Primary: ns1.mydomain.com
   Secondary: ns2.mydomain.com
   Secondary: ns3.mydomain.com
   Secondary: ns4.mydomain.com

3. Once you have made these configuration changes for your domain name, log in to your chosen domain management service provider, add your domain name to the list of domains you want to manage, and follow their instructions for enabling e-mail forwarding/redirection.

Note that Interealty does not endorse the services of MyDomain.com or ZoneEdit.com, and does not provide support for problems arising from e-mail forwarding. E-mail forwarding may remove or otherwise disable the XML tags contained in MLX Professional e-mail leads, so you may have to experiment with one or more e-mail forwarding services to determine compatibility with MLX Professional.

Generating “Smart” Leads from Other Web Sites

When a buyer requests more information on your Agent Web Site, an e-mail is sent to your MLX Professional e-mail address. This is no ordinary e-mail, however, because it contains special XML tags with information about the buyer and the property in which he or she is interested. MLX Professional uses this information to automatically perform a variety of time-saving functions—when the program receives one of these “smart” e-mail leads, the New Leads counter on the home page is incremented, the attached contact information is automatically converted into a new client record, and the property of interest is automatically added to the client’s Property List.

Your Agent Web Site uses a page with special HTML code to create these “smart” leads. This same page can be added to other Web sites to enable the generation of smart leads using a special link. To find this link, log in to MLXchange and click Settings, then click Agent Web Page Setup. Click the Domain header to expand the section. Here you will see your “Contact Me” Web Inquiry Form Link.

MLX Professional Check List

To ensure that you take full advantage of all the powerful features of MLX Professional, be sure that you:

1. Set up and customize your **MLX Professional Agent Web Site**. To make your Web site more personalized, be sure to upload your photo. It's important to set up your Web site because the template will also be used for your **Private Client Web Sites**. (Page 23)

2. Customize your **E-mail template** library. (Page 21)

3. In the **Client Manager**, start taking advantage of the **added fields** and **functionality**. In addition, you can start adding **To-Do's and Appointments** from your MLXchange Home Page.

4. After setting up your Property Lists for each client, preview each cleint's **Private Client Web Site**. If no changes are to be made, E-mail the individual links to your clients. (Pages 17 & 19)

5. Use your **"Contact Me!" Link** (Smart Lead Capture) on your other Web sites, so all your leads are directed in to your MLX Professional Message Center and Contact Manager. (Page 26 & 37)

6. Remember to check for **new e-mail messages** in your new **Message Center**. The **Message Center box** on your MLXchange Home Page will indicate if you have new messages, new leads, and new Prospect matches.