How to Recreate Tempo 5 Searches in MLXchange

Part 1 Initial Set-up options (One Time Only Procedures)

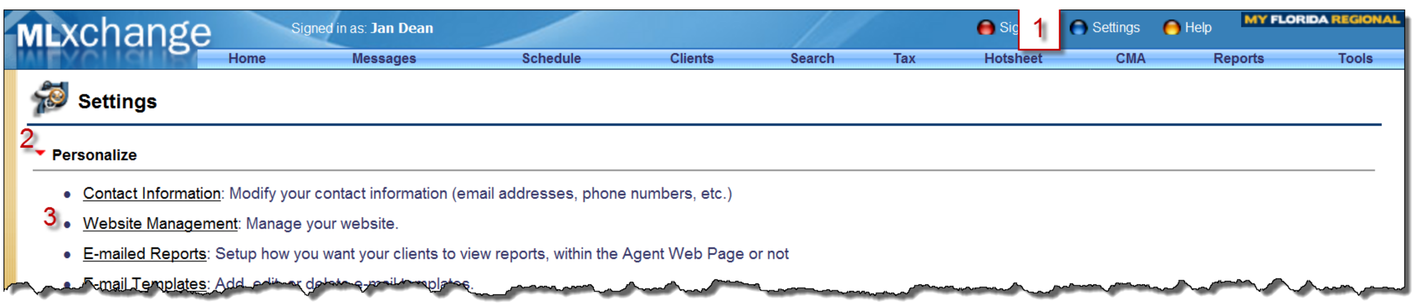
Step 1 Login to MLXchange and complete the initial setup requirements.

Complete the entire registration processes do not cancel or opt out of any configuration options. The MLXchange web address is http://mfr.mlxchange.com

Note: When logging in for the first time if you are prompted to disable pop-up blocking, ignore this message until you have completed the registration process.

Step 2 Return to the agent web page configuration options.

The registration process incorporates some of the webpage setup. The template /theme selected will serve as the backdrop for listings emailed to clients via the Client Gateway. You will want to go back to the Agent Webpage configuration page to see a more complete list of themes and configuration options. Click **Settings** (from the top right Corner > **Personalize** > **Website Management**.



Step 3 Confirm System Default Settings.

Certain task and behaviors can be pre-configured to save time. The following steps are designed to help with saved searches & auto-notifications default configurations.

a. Confirm your contact information and “Reply To” address are correct by clicking **Settings** > **Personalize** > **Contact Information**. Make sure your contact information is correct. It is recommended that the “Reply To” e-mail address: section has the option labeled “Use my Primary Email Address” selected. Click “Save”

b. Set the default manner in which all listings will be sent to your client by clicking **Settings** > **Personalize** > **Emailed Reports.** It is recommended that you set your default to “Within Client Webpage”

Note: You can overwrite the default on a per-client bases if desired.

c. Configure prospecting defaults by clicking **Settings** > **Personalize** > **Save Search Default Settings.**

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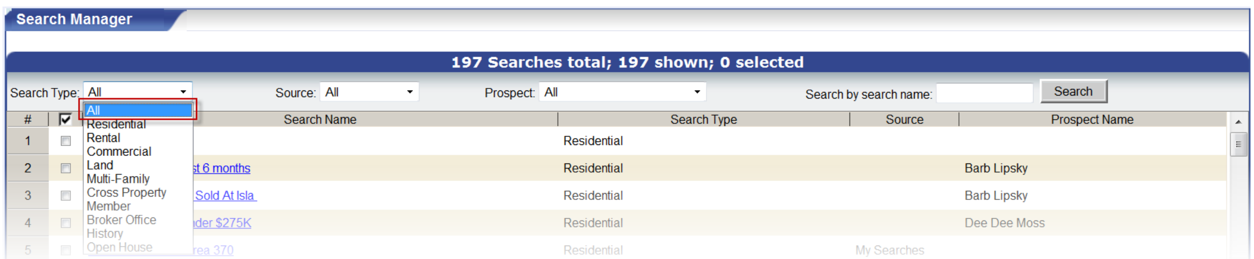
Part 2 Recreate Saved Searches in MLXchange

While logged into MLXchange open another browser tab and login to Tempo.

Step 1 From Tempo hover your mouse over the search link and select "Search Manager"

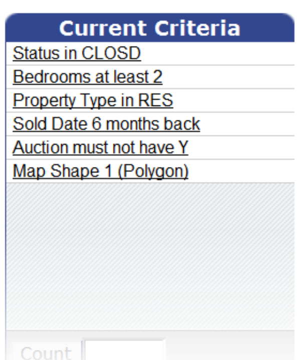
Step 2 At the top left corner of the search manager screen select the pull down option labeled "All". Make note of the searches that you plan to recreate in MLXchange. Keep in mind that all of your contacts were brought over and in some instances that may be enough. For those scenarios where a search continues to be relevant for a client. In those instances make note of the name of the search and the client the search was saved for. Click on the first search that will be recreated in MLXchange.



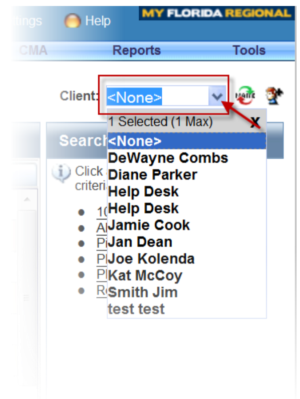
Step 3 Once the search criteria has loaded either:

a) Click on the statistics button at the lower right side of the search screen, click print.

b) Make note of the criteria from the "Current Criteria" box at the top left corner of the search screen and toggle back and forth between MLX and Tempo.



Step 4 Click the browser tab for MLXchange. Select the main menu option labeled Search. **Note**: At this point there is no need to hover and select a sub menu, click the main "Search" button.

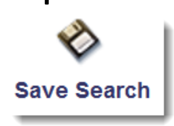


Step 5 In the top right corner of the search criteria screen click the "Client" pull down option. From your list of clients select the client that will be attached to the search criteria you are entering.

Step 6 Enter Criteria

- On top left of the search window select the appropriate Search Type for the search being entered.
- If an MLS Area was used in Tempo (MLS Area's are no longer used as search criteria in MFR, as an alternative you have the ability to draw shapes on the search map that outlines the area you would like to search. Some areas have been outlined for you and saved as templates) click the pull down option at the top of criteria screen labeled "Search Template" a template may exist that incorporates a map search that correlates to the area you selected in Tempo. You can only select one template per search but templates can be modified with additional map shapes and search criteria, and then saved for a client. The original template will not be affected.
- Enter any additional criteria entered into Tempo for the search being saved.

Step7 Click Save Search at the bottom right of the MLXchange Search screen.



Step 8 Name the search as it was originally named in Tempo and if you would like auto notification to go to that client select "Activate this Search: Yes"

Step 9 Review the additional saved search options and click "Save" at the bottom of the screen when complete.

Step 10 Disable the auto-notification option for the duplicated search in Tempo.

Repeat Steps 2-12 for the next search in Tempo.

Part 3 Tips and Tricks

1. Due to the number of auto-notifications handled by the servers it is necessary to designate a maximum number of days notifications will be sent before your input is required. This has been set to 60 Days. You have the ability at any time to reset your searches to the system maximum. From MLXchange hover over the **Search** option > Select **Save Search Manager** > Select the listing(s) to be extended >Select **Extend Expiry Date** > Enter 60 Days & select **Apply Now**
2. Notify your entire client list of the change to their customer portal. From the main menu list click **Clients.** Place a check mark next to the names of the clients to be notified. Select the option labeled Email at the bottom of the screen. **Note: All of the email addresses will appear in the To: line. Each client will receive an individual email. No one person will see who else is receiving the email.** Click the hyperlink labeled "Email Template Manager" click the button labeled NEW and create an email for the clients selected. You have the ability to insert merge fields for a more personalized feel. Name and save the email template. You are now able to select that template from a list of available templates prior to sending any email.
3. Utilized pre-configured templates, searches, reports, and columns created by your board. These are located in the same position as in Tempo, and mimic options/displays from Tempo.
4. After recreating a search in MLXchange disable that search in Tempo to prevent duplicates being sent to your client.
5. For a detailed explanation of how to save a search and enable auto notification click the "Help" button at the top right of MLXchange. Click the "MarketLinx Online Training' logo. Scroll down to the Prospecting video tutorial. Watch a 7 minute review of prospecting functionality.
6. To view the client gateway for a particular contact or to change if listings will be viewed via the gateway, Click **Clients** from the main menu. Select a client by clicking on the first or last name. Click the tab labeled **Client Gateway**. To view that clients website click the button labeled Preview Client Gateway. To change delivery option place a dot in the appropriate radial button next to the option in "Reporting Preference:"
7. Refer to the "Tempo to MLX Residential Then and Now Document" created by your board. This document will outline key criteria changes in the Residential status and will assist you in finding alternatives to Tempo only fields in MLXchange.
8. To closer mimic a Tempo saved search you may need to use the "Add More Criteria" option to add to the list of available search fields.
9. If your clients have listings saved on their Tempo fed client gateway that they would like to keep. Have them email you those listing's, MLS numbers. Enter those MLS numbers in the "Find a Listing" box on the homepage of MLXchange. Click the green go button. From the Results screen "select all" listings and click the option labeled "Associate to Client "at the bottom of the screen. In the resulting dialog window select the client to save those listings for. Click OK. These listing are now part of that client's new MLXchange client gateway. Those properties are located under the tab labeled "Recommended".
10. Manually email your client a link to their website. From the main menu select **Clients**. Click the first or last name of the client the link is for. Select the tab labeled **Client Gateway**. Choose the option at the bottom of the screen labeled "Email Link".

Notes: