









## Adding a New Client

You can add a new client record to the database from the Client Manager.

▶ ↓ **To create a new client record:**

1. From the Client Manager page, click **Add New Client**; or from the main menu, click **Clients > Add a client**.

The Add a New Client pop-up window opens.

*Note: You will need to scroll down to complete the entire record.*

Client Information -- Webpage Dialog

Add a New Client

Type client information below. Boxes marked with an asterisk (\*) are required.

Client Information

First name*	Last name*
Partner's first name	Partner's last name
Salutation	Mailing label
Status	Client Type (up to 8)
Home phone	Work phone
Cellular phone	Fax
Pager	
Other Phone 1	Other Phone 2
E-mail(1)	E-mail(2)
E-mail(3)	E-mail(4)

Summary Comments

Cancel Save

2. In the **Client Information** section, enter all known information, including:

- **First name/Last name** — these are required fields.

**NOTE!** Required fields are marked with an asterisk (\*) and must be completed.  
The field label appears in 'red' until completed; then it changes to 'blue'.

- **E-mail** — enter the client's e-mail address so you can send them listing reports.
- **Status** — click this drop-down list and select a category, such as **New** or **Active**. This field is used to categorize and sort your clients.
- **Client Type** — click this drop-down list to assign up to eight different contact types to a client record. This field is used to categorize and sort your contacts.
- Use the two fields with editable labels (**Other Phone 1**, **Other Phone 2**) to store custom information, such as additional phone numbers, Web addresses, etc.

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**NOTE!** *You will need to scroll down, as there are many more fields available that are not shown in the screen shot.*

3. In the **Summary Comments** section, enter free-form text, then click the **SpellCheck** icon to find any errors.
4. In the **Home/Work/Other Address** sections, enter all the address information for the client. Click the **This is their mailing address** option button to indicate which of the multiple addresses should receive mail.
5. In the **Tracking Information** section, enter:
  - **Lead source/Source name** — click the drop-down list and select the source of the lead, then type the source's name in the text box.
  - **Client ID** — assign an identification number by which you can track this client.
  - **Notes** — click **Add a Note** to prefix your comments with a date/time stamp. Enter free-form text, then click the **SpellCheck** icon to find any errors.
6. In the **Client's Preferences** section, enter:
  - property information including price range, number of bedrooms, number of bathrooms, square footage, what they are interested in and MLS number.
7. In the **Client's Personal Information** section:
  - enter birthday information, children's names, anniversary dates.

*Note: The date fields all have a pop-up calendar window, from which you can quickly select a day, month, and year.*
8. Click **Save**.

The client's name now appears in the client list.

**NOTE!** *For MLXchange Professional users, the **New Leads** counter under **Today's Summary** on the Home page increases by one if you assigned the contact a Status of **New**.*

## Editing Client Information

You can edit only one record at a time from either the Client Manager page or from the Client Record Details page.

### ▶ ↓ To edit a client record:

1. From the Client Manager page, select a client record you want to edit, then:
  - click the **Edit** Action button; or
  - using the mouse, point to the Information icon and select **Edit** from the Quick Access menu.

The Edit Client Information [Client name] pop-up window opens.

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**Edit Client Information: Richard Barnett**

Type client information below. Boxes marked with an asterisk (\*) are required.

**Client Information**

First name*:	Richard	Last name*:	Barnett
Partner's first name:		Partner's last name:	
Salutation:	Dear Richard,	Mailing label:	Richard Barnett
Status:	Active-Hot	Client Type (up to 8):	
Home phone:	(456) 222-9876	Work phone:	(456) 222-7000
Cellular phone:	(778) 098-2345	Fax:	
Pager:			
Other Phone 1:		Other Phone 2:	
E-mail(1):	rbarrett@marketlinx.com	E-mail(2):	
E-mail(3):		E-mail(4):	

**Summary Comments**

Cancel Save

2. Make the necessary changes using the same fields as described in the Adding a New Client section.
3. Click **Save**.  
The client record is updated.

## Sending E-mail to Clients

You can send an e-mail message to any number of clients and members.

### ▶ ↓ To send an E-mail:

1. From the Client Manager page, select one or more client records from the list, then:
  - click the **E-mail** Action button; or
  - using the mouse, point to the Information icon and select **E-mail** from the Quick Access menu.The Send E-Mail page opens.

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2. Complete the **To**, **Cc** and **Bcc** fields; or click the link on the right side to select recipients from the database.

*Note: In most cases, the **To** field will already contain the e-mail addresses of the intended recipient(s). If you have multiple recipients in the **To** field, you cannot use the **Cc** and **Bcc** fields.*

3. To ensure there is a title in the **Subject** line, do one of the following:
  - click the **E-mail template** drop-down list and choose **None**. Then, type a new subject line.
  - click the **E-mail template** drop-down list and choose a pre-written system template. Click the **Template filter** drop-down list and choose a filter to apply.
  - click the **Email Template Manager** link to create a new template or edit an existing template. See
4. In the **Message** box, type a message, then click the **SpellCheck** icon to check for errors. If you have selected an e-mail template, the message is already written.
5. Use the E-mail rich text editor to add attributes to the text.
6. Should you want to **Schedule a follow-up**, select the check box, then click the drop-down list and choose a **To-do** or **Appointment**.
7. Click **Send**.

## Printing Client Information

The Print feature lets you print client information in a variety of different formats, from client lists to custom-designed reports and mailing labels. Use the MLXchange Designer Tool to create different reports.

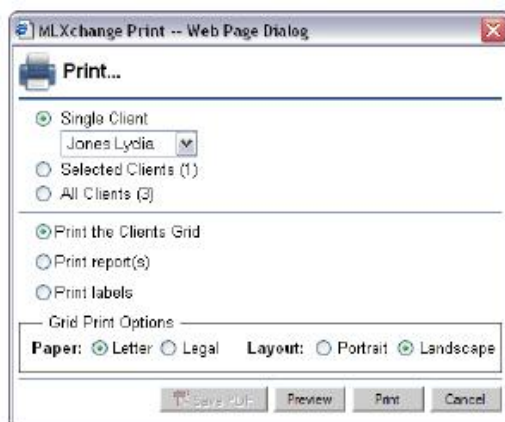
## Client Lists

The Client Manager page displays a list of client records. Depending on the column format that has been applied, such as the Client Summary sheet, you can see specific summary information about each of the records.

### ▶ ↓ To print a client list:

1. From the Client Manager page:
  - select a single client record from the list, point to the Information icon to display the Quick Access menu, then click the **Print** icon; or
  - select multiple client records in the list, then click the **Print** button in the bottom right corner of the page.

The Print dialog box opens.



**NOTE!** Regardless of which clients you selected in the Client Manager list, you can still change your selection directly from the Print dialog box.

2. Choose one of the client option buttons:
  - **Single Client** — click the drop-down list and select an individual client by name. This selection can be different from the one you selected earlier.
  - **Selected Clients (#)** — click this option to print the client records you selected on the Client Manager page.
  - **All Clients (#)** — select this option to print a list of all client records in the MLXchange database. The total number is displayed in brackets.

3. Select the **Print the Clients Grid** option.

The **Grid Print Options** appear in the bottom section of the dialog box.

4. Select a **Paper** size option: **Letter** or **Legal**.
5. Select the **Layout** or orientation option: **Portrait** or **Landscape**.

**NOTE!** If you choose **Landscape** orientation for your page **Layout**, you may also have to set your printer's paper orientation to **Landscape**. To do this, click **Properties** on the Print dialog box before starting the print job.

6. Click **Preview** to generate a report preview.

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7. Click **Print**.

A standard Windows Print dialog box opens.

8. Choose any additional options (e.g., number of copies, destination printer, etc.).

- click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.

9. Click **OK**.

## Client Labels

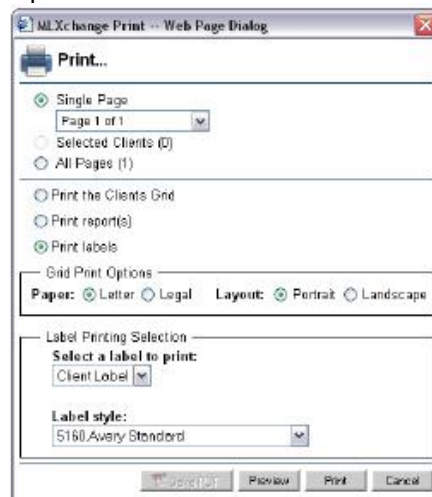
Client labels are mailing labels set up in a report format.

▶ ↓ **To print client mailing labels:**

1. From the Client Manager page:

- select a single client record from the list, point to the Information icon to display the Quick Access menu, then click the **Print** icon; or
- select multiple client records in the list, then click the **Print** button in the bottom right corner of the page.

The Print dialog box opens.



2. Select the **Print labels** option, if it is not already selected.

The label report page options appear in the top of the dialog box, and the **Label Printing Selection** options appear in the bottom of the dialog box.

3. In the **Label Printing Selection** section in the bottom of the dialog box, click:

- the **Select a label to print** drop-down list and choose the label report, such as **Client Label**.
- the **Label style** drop-down list and choose the Avery number that matches the kind of labels you are using.

4. In the top of the dialog box, choose one of the label page options:

- **Single Page** — click the drop-down list and select a label page(s) to print, e.g. **Page 1 of 1**.
- **Selected Clients (#)** — click this option to print labels for the clients currently selected on the Client Manager page.
- **All Pages (#)** — select this option to print all pages of the label report.

5. Click **Print**.

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A standard Windows Print dialog box opens.

6. Choose any additional options (e.g., number of copies, destination printer, etc.).
  - click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.
7. Click **OK**.

## Deleting Client Records

Select one or more unwanted client records to delete from the database. Any CMAs associated with the client, will also be deleted.

**NOTE!** *MLXchange does not have a "Recycling Bin." Deleted records are gone for good.*

### ▶ ↓ To permanently delete a client record:

1. From the Client Manager page, select one or more client records from the list, then:
  - click the **Delete** Action button; or
  - using the mouse, point to the Information icon and select **Delete** from the Quick Access menu.A message box prompts you to confirm the deletion. Take note of the information you are about to lose, such as CMAs associated to the client and saved searches.
2. Click **OK**.

The client record and all related information is removed.

## Reassigning Clients

You can reassign your clients to other MLXchange Professional users within the same office. This feature causes the client to disappear from your Client list and appear on the other Agent's Client list.

### ▶ ↓ To reassign a client to another user:

1. From the Client Manager page, select one or more client records you want to reassign from the list.
2. Select **Reassign** from the Action menu, then click the arrow button.

The Reassign Clients dialog box opens.



3. Select the name of the MLXchange Professional user from the list to whom you want to reassign the selected clients.

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

4. Click **OK**.

## Merging Duplicate Records

To keep your client record database up-to-date, you can merge duplicate records. Choose the most complete of the duplicates as the “destination” file. All other selected files will be merged into it.

### ▶ ↓ To merge duplicate client records:

1. From 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 menu, then click the arrow button.

The Merge Clients dialog box opens.



3. Select ONE record from the drop-down list into which all other selected client records will be merged.
4. Click **OK**.

**NOTE!** Only the contact information for the selected client will be retained. Any unique contact information contained in the duplicate records WILL BE deleted permanently. Scheduled Interactions, Client History, Search History, Property List, any CMAs and presentations from the other clients will be added to the selected client's record.

## Changing the Status of Multiple Clients

You have the ability to change the status of a group of clients *en masse*, which is especially useful after importing a large number of clients from another program.

### ▶ ↓ To change the status of multiple clients simultaneously:

1. From the Client Manager page, select the clients from the list whose status you want to change.
2. Select **Change Status** from the Action menu, then click the arrow button.

The Change Status dialog box opens.



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3. Select a new status from the drop-down list, then click **OK**.

All of the selected clients are assigned the selected status.

## Importing and Exporting Client Information

You can enter client information manually, but you can import client information directly from other sources, such as Microsoft Outlook or Top Producer®.

Client information is also added automatically whenever a prospect electronically inquires about a listing on your Agent Web Site.

### ▶ ↓ To import client information:

- From the Client Manager page, select **Import** from the Action menu and click the arrow button.

The Client Import page opens.

*Note: This feature is described in another section*

### ▶ ↓ To export client information:

1. From the Client Manager page, select one or more records you want to export.

**Note: To export all records, do not select any.**

2. Select **Export** from the Action menu, then click the arrow button.

The Client Data Export page opens.

*Note: This feature is described in another section.*

## Viewing Client Record Details

The client record provides a consolidated view of a selected client's contact information, search and e-mail history, CMAs, property lists, and private searches set up on the Agent website. MLX Professional users can also see completed Tasks, schedule new Appointments and To-Dos, and add listings to a selected client's Property List.

### ▶ ↓ To see a preview of the client's contact information only:

1. From the Client Manager page, click on a record item in the list.

4	<input checked="" type="checkbox"/>		Douglas Cornwall	New	777 Lucky Road	(206) 511-4326	(206) 512-8989	207-8582
Douglas Cornwall			Home: (206) 511-4326		Fax: (206) 511-4326			
777 Lucky Road			Work: (206) 512-8989		Other Phone 1: (206) 512-8989			
Barnswallow, TX 12308 USA			Cell: 207-8582		Other Phone 2: 207-8582			
Email: 1) D.Corn@marketlnx.com								
Status: New			Type: Buyer					
Comments:								

The line item opens to display a brief summary of contact information, such as address, phone numbers, e-mail addresses, etc.

2. Click the line item again to close the preview.



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- **Edit** — opens the Edit Client Information dialog box letting you make changes
- **Preview Client Website** — opens a new browser window displaying a preview of the client's private page of your web site.
- **E-mail Private Link** — opens the Send E-mail dialog box, letting you e-mail a private link to a personal web page set up for the client.
- **Add New To-Do** — opens the Add a New Event dialog box, letting you set up new to-do details. The task is created and stored on the **Tasks** tab of the Schedule.
- **Add New Appointment** — opens the Add a New Event dialog box letting you set up new appointment details. The appointment is created and stored on the **Appointments** tab of the Schedule.
- **Delete Client** — lets you delete the client record, along with all saved searches and CMAs associated to the client. When the message box appears, click **OK** to continue

## Client Info Tab

The **Client Info** tab lets you see the client's contact information, such as addresses, phone numbers, tracking information, client preferences, etc.

▶ ↓ **To choose a report type to display the client information:**

- Click the **View** drop-down list, located in the top left of the page, and select: **Client Detail**, **Client Label**, **Client Summary** and more (including custom reports you created).

## Import/Export

### Importing Client Information

MLXchange has a built-in import feature that enables you to import client information from other sources, such as Microsoft Outlook or Top Producer®.

Client information is also added automatically whenever a prospect electronically inquires about a listing on your Agent Web Site.

▶ ↓ **To import client information into MLXchange:**

1. From the Client Manager page, select **Import** from the Action menu, then click the arrow button. The Client Import page opens.

**Client Import**

Data Format:

- Import Microsoft Outlook 2000 or later
- Import Top Producer 8.0 or 8 Contacts
- Import Top Producer 7.1 Contacts

If MLXchange already contains a record for a client being imported:

- Keep the client record.
- Overwrite the client record with the one being imported.
- Add a new client record (this will result in duplicate records).

Cancel Next

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- In the **Data Format** section, select the option button that describes the application (and version) from which you want to import client information:
  - Import Microsoft Outlook 2000 or later**
  - Import Top Producer 6.0 or 6i Contacts**
  - Import Top Producer 7i Contacts**
- Select what you want MLXchange to do if the program already contains a record with the same name as one that is being imported:
  - Keep the client record** — the new contact record will not be imported.
  - Overwrite the client record with the one being imported** — existing client information in the MLXchange database will be replaced with the imported client information.
  - Add a new client record** (resulting in duplicate records) — both the existing and imported client records are preserved, however, this may result in duplicate client records.

**NOTE!** *Members can use the Client Manager's Merge feature to combine duplicate client records.*

- Click **Next**.

The Client Import page opens with onscreen instructions for the application you chose in step #2.

- If you are importing from:
  - Microsoft Outlook, the records from the Contacts folder in Outlook's Personal Folders will be imported. Go to step 6.
  - Top Producer, follow the onscreen instructions to export your Top Producer contacts to a text file (.txt or .csv). Once the export file has been created and saved, click **Next** to open the last page of the Client Import wizard.



Client Import

To start importing your contacts from Top Producer, type in or use \*Browse... button to select the file you exported in the previous step, then click Import.

Exported Top Producer contact file:

- Click **Browse** to navigate to where you saved the Top Producer export file, highlight it and click **Open**.
- Click **Import**.  
A message dialog box appears telling you the contacts have been imported successfully.
  - Click **OK**.

## Exporting Data from MLXchange

MLXchange lets you export information and images for use in other areas of the program, or in other applications, such as Microsoft® Excel®. You can export:

- client records
- listing data
- hotsheet data

A file compression option is available to reduce the file size for faster export time. If you choose this option, the export file will be a zipped (.zip) file.

**NOTE!** *Before exporting client data, you may want to use the Column Manager to create a special layout format that lets you specify an export structure to the exported records, determining which fields are exported and in what order. In fact, if you export records regularly, you may want to create an export grid layout for that purpose.*

### ▶ ↓ To select an export layout format:

- From the Client Manager or Listings Search Results page, click the **Columns** drop-down list and select a format you want to use for export.

## Exporting Client Records

Choose some or all of your client records to export. To export some of your records, select them from the Client Manager list before you use the Action menu.

To export all client records, either select all by clicking on the check box column header, or leave them all unselected. The system assumes you mean to select them all and will have the correct option button chosen accordingly.

### ▶ ↓ To export client data from Client Manager:

1. From the Client Manager page, select the records to export from the list.
2. Select **Export** from the Action menu, then click the arrow button.

The Client Data Export page opens.



The screenshot shows a dialog box titled "Client Data Export". It has three main sections: "Select Records to Export" with radio buttons for "Selected Records" and "All Records (8)", where "All Records (8)" is selected; "Data Export Format:" with a dropdown menu set to "Comma Delimited"; and "Export Options" with a checkbox for "Compress file" which is unchecked. Below the checkbox, it says "Compression is recommended when exporting more than 100 records". At the bottom right, there are "Cancel" and "Next" buttons.

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*Note: In the Select Records to Export section, the correct option button will be selected.*

3. Click the **Data Export Format** drop-down list and choose an option:
  - **Comma delimited** — values in the text file will be separated by commas.
  - **Tab delimited** — values will be separated by tabs.
4. In the **Export Options** section, select the **Compress file** check box if you are performing a large export (more than 100 records) and want to decrease the size of the file and the time it will take to download.
5. Click **Next**.

The next page of the wizard opens.



6. Click the **Select Export Grid Format** drop-down list and choose one of the grid formats. These formats specify the fields to be exported, and the order in which they are exported.
7. Select the **Include Column Headers?** check box to include the column headers (name of the column, such as **Name**) as the first row in the exported file. This helps you identify the data in each of the columns.
8. Click **Next**.

A File Download dialog box opens.
9. Click **Save**.
10. Use the Save As dialog box to navigate to a convenient location on your computer to save the file.

*Note: The file is automatically named "clients\_[current date]\_[system number].txt", or .zip if you chose compression. You can change this name by typing a new one in the File Name field of the Save As dialog box.*
11. Click **Save** again to complete the process.

The Download complete dialog box opens.
12. Click **Close**.
13. Click **Back** to return to the Client Manager page.

## Sending E-mail

You can send an e-mail message to any number of clients and members from various places throughout the program, for example, from the Client Manager, or by clicking the **E-mail** action button or Quick Access menu option on search results pages.

**NOTE!** *Members have the 'Write a message' command directly from the Messages menu. No matter what page you are currently viewing, click this menu command to open the Send E-mail dialog box.*

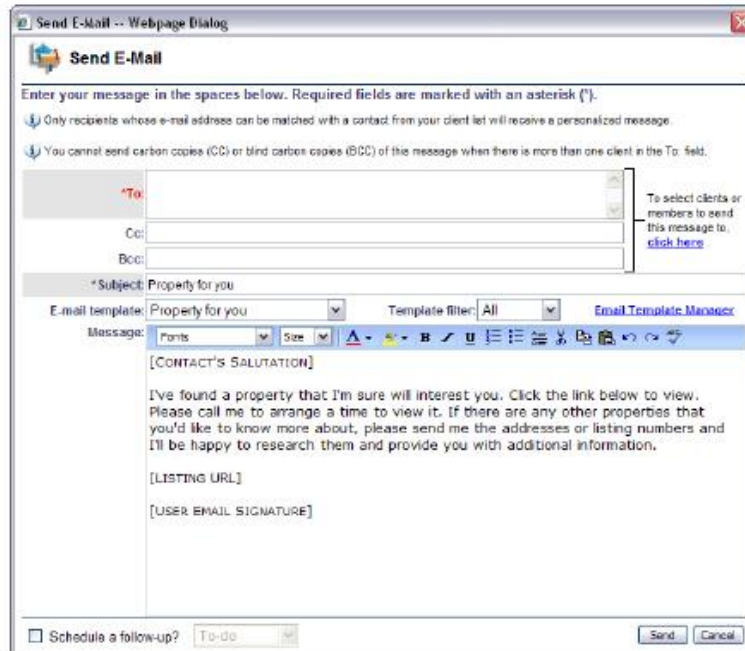
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These instructions assume you have already opened the Send E-mail dialog box.

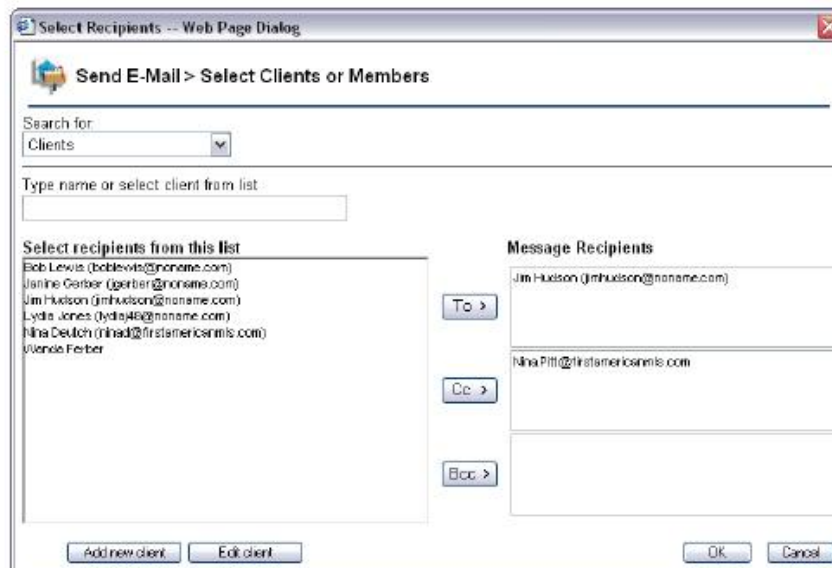
## ▶ ↓ To compose and send an e-mail:

1. With the Send E-Mail dialog box open:
  - enter recipient e-mail addresses in the **To**, **Cc**, or **Bcc** fields.

*Note: Separate multiple addresses with semi-colons.*



2. To select any additional recipients to whom you want to send the message, click the **click here** link. The Select Recipients page opens.



3. Click the **Search for** drop-down list and choose the kind of records you want:
  - **Clients** — quickly locate a client by typing their name in the field.

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- **Members** — if you are looking for MLS member addresses, you must enter at least two letters of a first name, last name, or office code, then click **Find**.
4. Select a contact from the list, then click either **To**, **Cc**, or **Bcc** to add them to the appropriate address field.
    - to select multiple contacts, hold down the **CTRL** or **SHIFT** key while you click.
  5. Click **OK** to accept the **Message Recipients** and return to the Send E-mail page.
  6. Type a new **Subject** line; or accept the title of a pre-written template.

*Note: If you are using a pre-written e-mail template, the **Subject** field will display the title automatically. Click the **E-mail Template** drop-down list and select from a list of available titles. Otherwise, select **None** from the list to type your own **Subject** line and compose your own message. Information on using the E-mail Template Manager are described in another section*

7. Type the body of the e-mail in the **Message** box, using the E-mail Editor to apply attributes to the message:
  - **Fonts** — click the drop-down list and select one of the available font styles, for example **Arial**, **Times New Roman**, etc.
  - **Size** — click the drop-down list and select the font size (in points), for example, **8pt**, **10pt**, **12 pt**, etc.
  - **Font Color** — Highlight the text you want to apply color to, then click the down arrow to open the Color palette. Select a color swatch and click **OK**.
  - **Back Color** — Highlight the text you want to highlight, then click the down arrow to open the Color palette. Select a color swatch and click **OK**.
  - **Bold, Italic, Underline** — highlight the text you want to format, then click the corresponding toolbar icon.
  - **Insert Line** — place the cursor in the message, then click the icon to insert a line.
  - **Cut, Copy, Paste** — highlight the text you want to cut or copy, then click the corresponding toolbar icon. Place the cursor in the message to insert text, then click the **Paste** toolbar icon.
  - **Undo, Redo** — click one of the toolbar icons to undo an action or to redo an action. For example, if you cut a chunk of text from the message, then changed your mind, click the **Undo** toolbar icon to reverse the action.
  - **Spell Check** — click the **Spell Check** icon to search for spelling errors in the message.

**NOTE!** *Disclaimer text may be added to the end of your e-mails. This text is maintained by your office manager and cannot be removed.*

8. To create a follow-up activity, select the **Schedule a follow-up?** check box and choose **To-Do** or **Appointment**.

*Note: When the e-mail has been successfully sent, you will be prompted to enter the details of the follow-up task.*

9. Click **Send**.

You are notified when the e-mail message has been successfully sent.

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

## My Schedule

### Viewing My Schedule

**NOTE!** This section assumes that you are working with MLX Professional.

One of the first things you'll want to see when you log on to MLXchange is a list of the tasks and appointments you have scheduled for today. The Home page summarizes this important information, including the number of Appointments and To-Dos (both Due and Overdue).

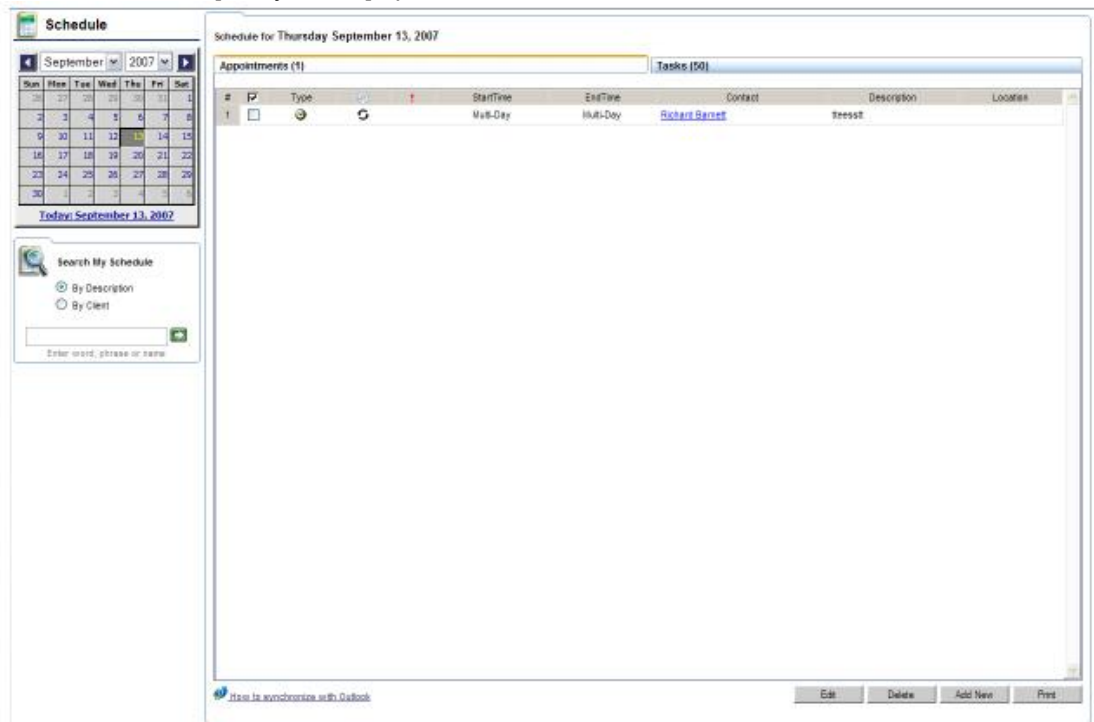
Today's Summary	
<a href="#">Inbox</a>	22
<a href="#">Appointments</a>	2
<a href="#">To-Dos</a>	52
<a href="#">New leads</a>	2

▶ ↓ **To open Today's Schedule from the Home page:**

- Simply click the **Appointments** or **To-Dos** link from Today's Summary; or you can click the **Schedule** Quick Link.

*Note: Additionally, you can click **Schedule** from the main menu.*

The Schedule for [today's date] opens.



▶ ↓ **To display the Schedule for another date:**

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- From opened Schedule, using the calendar to select a month, day and year.

## Searching My Schedule

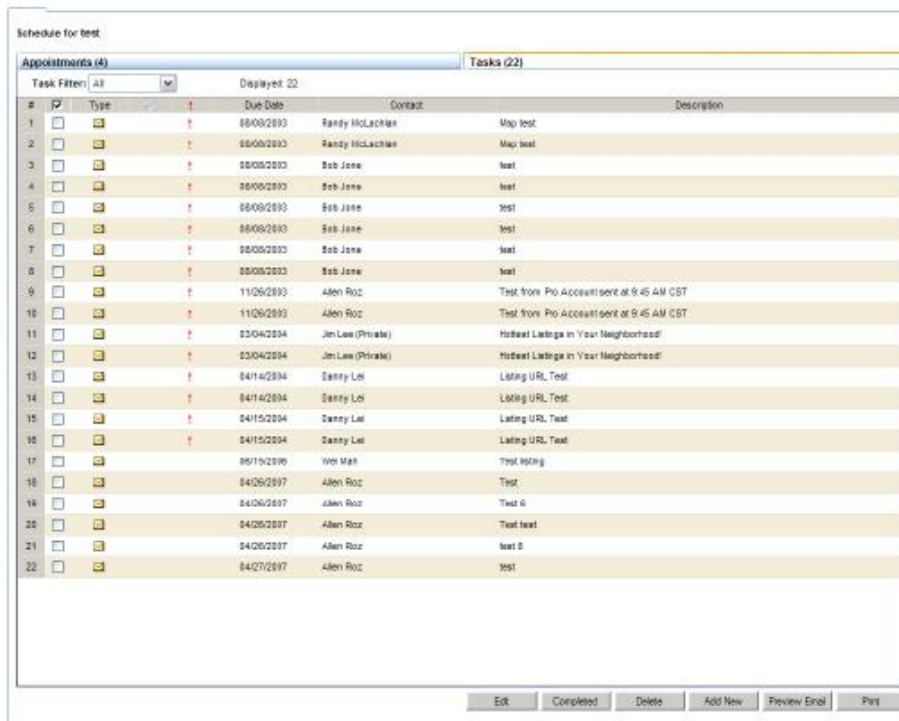
If you know the description or the client name of the scheduled event, in whole or in part, you can quickly search for and find the event details by using the **Search My Schedule** section.



### ▶ ↓ To perform a quick search of My Schedule:

1. From the **Search My Schedule** section in the left pane of the **Schedule** main page, click one of the options:
  - By Description
  - By Client
2. In the field provided, type a word, phrase, or name (in whole or in part).
3. Click the arrow button.

A history of matching tasks is displayed on the **Appointments** and **Tasks** tabs.



#	Type	Due Date	Contact	Description
1		08/09/2013	Randy McLachlan	Map test
2		08/09/2013	Randy McLachlan	Map test
3		08/09/2013	Bob Jones	test
4		08/09/2013	Bob Jones	test
5		08/09/2013	Bob Jones	test
6		08/09/2013	Bob Jones	test
7		08/09/2013	Bob Jones	test
8		08/09/2013	Bob Jones	test
9		11/09/2013	Allen Roz	Test from Pro Account sent at 9:45 AM CST
10		11/09/2013	Allen Roz	Test from Pro Account sent at 9:45 AM CST
11		03/04/2014	Jim Lee (Private)	Hotbeat Listings in Your Neighborhood!
12		03/04/2014	Jim Lee (Private)	Hotbeat Listings in Your Neighborhood!
13		04/14/2014	Danny Lei	Listing URL Test
14		04/14/2014	Danny Lei	Listing URL Test
15		04/15/2014	Danny Lei	Listing URL Test
16		04/15/2014	Danny Lei	Listing URL Test
17		06/19/2016	Wei Ma	Test 16616
18		04/09/2017	Allen Roz	Test
19		04/06/2017	Allen Roz	Test 6
20		04/05/2017	Allen Roz	Test test
21		04/05/2017	Allen Roz	test 5
22		04/07/2017	Allen Roz	test

4. You can change the page view by:

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- clicking a column header to sort the list in ascending or descending order.
  - dragging and dropping a column header to a new location to rearrange the column order.
5. Select an event in the list, then click one of the buttons in the bottom right corner to perform more tasks:
- **Edit** — opens the Add/Edit Event dialog box, letting you modify details.
  - **Completed** — changes the event to a status of “completed”, with today’s date.
  - **Delete** — deletes a selected event, along with its Client History.
  - **Add New** — opens the Add/Edit dialog box, letting you create a new event.
  - **Preview E-mail** — opens the Send E-mail dialog box, letting you view or create an e-mail message.
  - **Print** — lets you print an Appointment or Task related report.

*Note: Events are discussed in more detail in the Plans Manager section.*

### Working with the Appointments Tab

Appointments are separated from the remainder of the tasks. You can see the number of appointments you have scheduled, by looking at the number displayed on the tab. At a glance, you can see the important details of each appointment; the start and end time, whether it is a repeating event, description and location.

Working with Events is discussed in another section.

### Working with the Tasks Tab

The **Tasks** tab of the Schedule displays all types of tasks that are needed to be completed for the specified date. The list color codes the tasks accordingly:

- black denotes current tasks
- red denotes overdue tasks
- blue denotes upcoming tasks

As with the **Appointments** tab, you can see the important details of each task; the type, start and end time, whether it is a repeating event, description, client and location.

Use the **Task Filter** drop-down list to view only those tasks of a certain type. Select a task from the list, then click one of the buttons to perform further actions.

Working with Events is discussed in another section.

## Plans Manager

### About Action Plans

Action plans are pre-defined events that are automatically scheduled, based on a specified date and time. Within an action plan are a number of scheduled tasks designed to help you accomplish a goal. Successful plans can be repeated by having them displayed in ‘My Schedule’. Action plans include new client plans, past client plans, farming and follow-up plans. There are up to four levels of action plan, depending on your access level. For example an Agent will only see and work with Personal action plans.

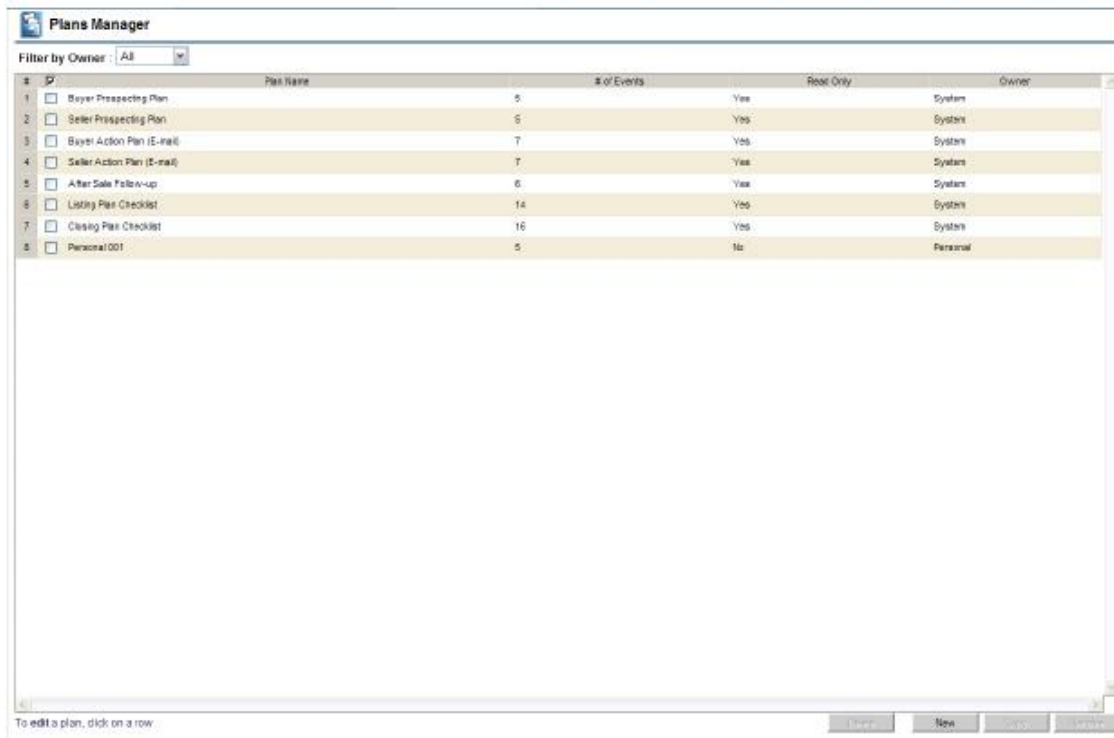
### Managing Action Plans

The Plan Manager page gives you an overview of the plans that are available to you, the number of events within each, whether they are read only, whether you have editing rights, and the type of plan (e.g. System, Personal, etc.).

▶ ↓ **To access the Plan Manager:**

1. From the main menu, click **Schedule > Plans Manager**.

The Plans Manager page opens.



2. You can change the page view by:

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- clicking a column header to sort the list in ascending or descending order.
  - dragging and dropping a column header to a new location to rearrange the column order
3. Click the **Filter by Owner** drop-down list in the top left corner to view only those plans of a specific type; or select **All** to see the entire list.
  4. Click on a row to view or edit a specific plan. Follow the instructions described in [Creating a New Action Plan](#).

*Note: You must have sufficient access rights to be able to edit a plan. Anyone can edit their own Personal plans.*

5. Select a plan, then use the buttons in the bottom right corner:
  - **New** — create a new action plan, based on your level of security. For example, if you only have Agent access, you can only create a new Personal action plan.
  - **Copy** — create a new action plan by taking a copy of an existing plan, then renaming it.
  - **Rename** — change the name of an existing plan, based on your level of security.
  - **Delete** — deletes the selected plan and all incomplete client events associated with the plan.

### Copying an Action Plan

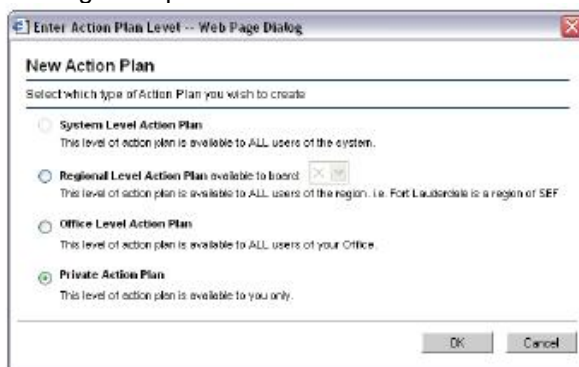
If there is an action plan that you'd like to use again, simply copy it, make the necessary changes and save it under another name. A copied action plan is called a Personal plan, which means you can edit or delete it at any time.

#### ▶ ↓ To copy an existing action plan:

1. From the Plans Manager page, select a plan from the list.

*Note: You can only copy one action plan at a time.*
2. Click the **Copy** button.

The New Action Plan dialog box opens.



3. Choose the level of action plan you want to create.
4. Click **OK**.

The Enter Action Plan Name dialog box opens.

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5. Type a new name for the Action plan, then click **OK**.  
The new plan is listed on the Plans Manager page.
6. Click the plan to make changes.

## Renaming an Action Plan

You can rename an action plan for which you have sufficient access privileges.

### ▶ ↓ To rename an existing action plan:

1. From the Plans Manager page, select a plan from the list.  
*Note: You can only rename one action plan at a time.*
2. Click the **Rename** button.  
The Rename Action Plan dialog box opens.



3. Type a new name in the **Action Plan Name** field, then click **OK**.  
The renamed action plan appears on the Plans Manager page.

## Deleting an Action Plan

**NOTE!** *Deleting one plan may affect a large number of users. Please be aware of the consequences before you decide to delete an action plan from the application. Incomplete client events associated with the plan are deleted. Completed plans are not affected.*

### ▶ ↓ To delete an existing action plan:

1. From the Plans Manager page, select one or more action plans from the list.
2. Click the **Delete** button.  
A warning message appears, asking you to confirm the deletion.
3. Click **OK**.

## Creating a New Action Plan

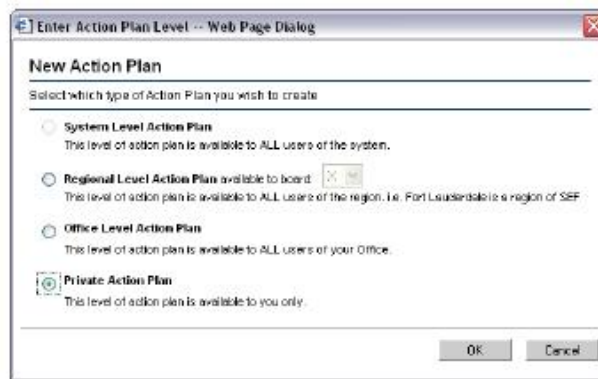
When you create a new action plan, it isn't enough just to name it. You must add events to it (appointments, to-dos, calls).

*Note: These instructions are also valid for editing an action plan.*

▶ ↓ **To create a new action plan:**

1. From the Plans Manager page, click the **New** button, located in the bottom right corner.

**NOTE!** The Enter Action Plan Level pop-up dialog box opens.



*If you don't see this dialog box, your level of access within the program is set to the Private level only. In this case you will only work with Private action plans.*

2. Select the level of action plan you want to create.
3. Click **OK**.

The Enter Action Plan Name dialog box opens.



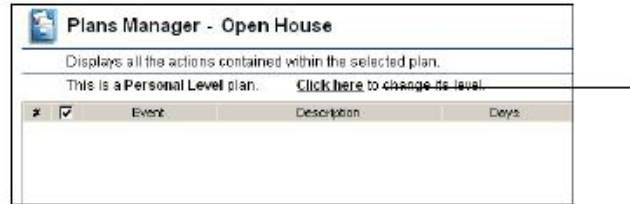
4. Type a name, then click **OK**.

The new action plan is displayed on the Plans Manager page.

*Note: Notice the **Owner** column. It tells you the level of your new action plan.*

5. From the Plans Manager page, click on the new action plan in the list.  
The Plans Manager - [name of plan] opens.

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There are no events listed.

6. Proceed to "[Adding Events to an Action Plan](#)".

## Adding Events to an Action Plan

The events you add to an action plan will be generated once the plan is applied, because the dates of the events are directly dependent upon the start or end date of the entire action plan.

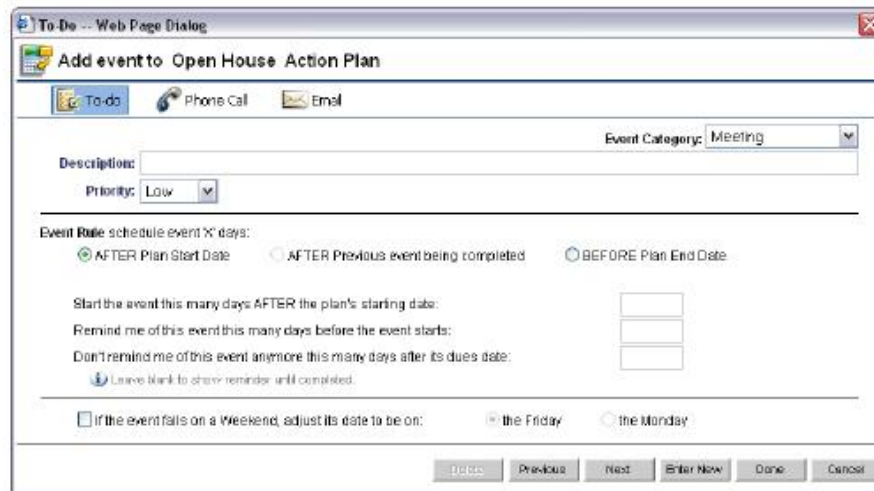
*Note: Note how action plan events are different than adding single events directly to the calendar or to a client.*

There are three types of event: To-do, Phone call, and e-mail. A To-do is an event that does not have a specific time associated to it, but is part of the list of things to accomplish.

### ▶ ↓ To add a To-Do to the action plan:

1. From the Plans Manager - [plan name] page, click the **New** button.

The Add Event pop-up dialog box opens. By default, the **To-do** button is selected.



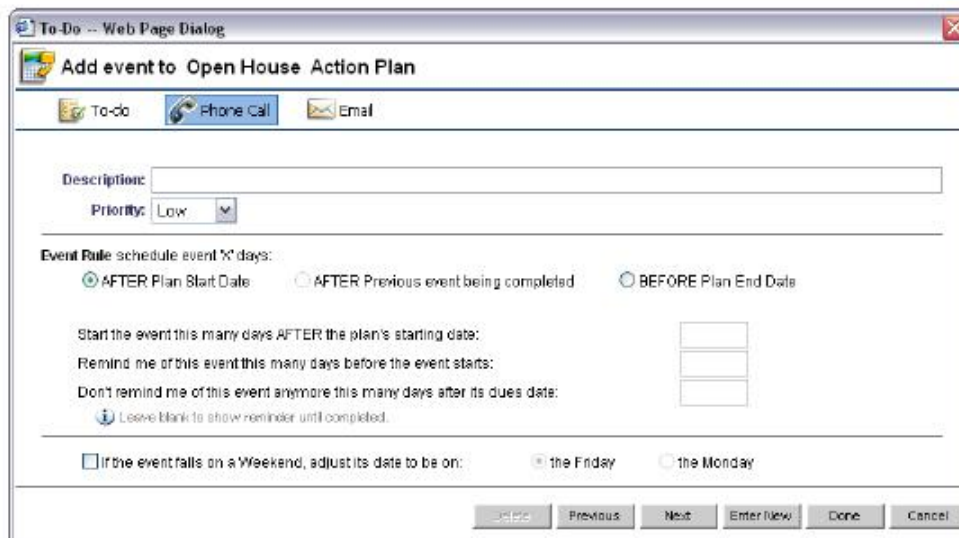
2. Click the **Event Category** drop-down list and choose the type of To-do task you want to add: Meeting, To-do, Letter, Fax, Note or Lead.
3. Type a **Description** of the event in the field provided.
4. Select a level of **Priority** for this task: Low, Normal or High.
5. In the **Event Rule** section, schedule the event to occur in relation to the plan date:
  - **AFTER Plan Start Date** — enter the number of days this event should start, AFTER the plan's start date.

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- **After Previous event being completed** — enter the number of days this event should start, AFTER the plan's previously scheduled event ends. Then click the drop-down list and select the previous event.
  - **BEFORE Plan End Date** — enter the number of days this event should start, BEFORE the plan's end date.
6. Set up a reminder by entering the number of days you want to be reminded BEFORE the event starts.
  7. End a reminder for an overdue event by entering the number of days AFTER the due date. You will stop being reminded.
    - leave this field blank to continue the reminders until the event's completion.
  8. To avoid scheduling on Saturday or Sunday, select the check box, **If the event falls on a week-end, adjust its date to be on**, and choose either **the Friday** or **the Monday**. The event is automatically rescheduled.
  9. Click **Done**; or **Enter New** if you are scheduling more new events.

### ▶ ↓ To add a Phone Call to the action plan:

1. From the Plans Manager - [plan name] page, click the **New** button.  
The Add Event pop-up dialog box opens.
2. Click the **Phone Call** button.



3. Follow steps #3-9 of the previous topic. The fields for entering a new call event are the same as entering a new To-do.

### ▶ ↓ To add an E-Mail to the action plan:

1. From the Plans Manager - [plan name] page, click the **New** button.  
The Add Event pop-up dialog box opens.
2. Click the **E-mail** button.

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3. Type a **Description** of the event in the field provided.
4. Select a level of **Priority** for this task: Low, Normal or High.
5. Click the **Email Template** drop-down list and select the name of a pre-written message to use.
6. Follow steps #5-9 of the previous topic. The remaining fields for entering a new e-mail event are the same as entering a new To-do or Call event.

## Editing Events in an Action Plan

The instructions for editing an event are the same as for adding an event.

### ▶ ↓ To edit the details of an added event in an action plan:

1. From the Plans Manager page, click on a plan.  
The selected plan opens, displaying the events.
2. Select an event to edit by:
  - selecting the check box, then clicking the **Edit** button; or
  - clicking directly on the event in the list
3. Modify the information in the fields by following the descriptions outlined in the "[Adding Events to an Action Plan](#)" topic.

## Deleting Events from an Action Plan

You can delete an event from an action plan, if you have sufficient access privileges.

### ▶ ↓ To delete an event from an action plan:

1. From the Plans Manager page, click on a plan.  
The selected plan opens, displaying the events.
2. Select one or more events to delete, then click the **Delete** button.  
A message box appears asking you to confirm the deletion.

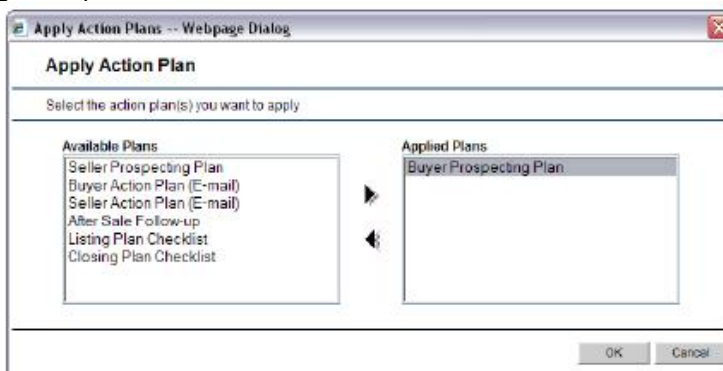
3. Click **OK**.

## Applying an Action Plan

Once you have created some action plans with events, you can apply an action plan directly from the **Tasks** tab of a selected client's record. As well, you can schedule a follow-up activity or an appointment with the client that is independent of the action plan and its related events.

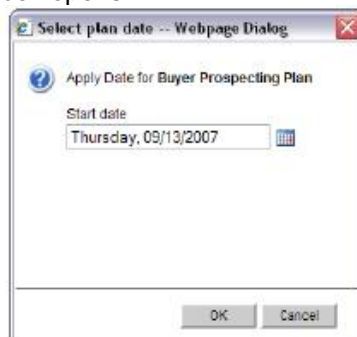
### ▶ ↓ To apply an action plan:

1. From the Client Manager page, select one or more clients, then click the **Details** button.  
The client record opens.
2. Click the **Tasks** tab.
3. Click the **Apply Plan** button in the top right corner of the page.  
The Apply Action Plan dialog box opens.



4. Highlight a plan in the **Available Plans** list.
5. Click the right arrow button [ ▶ ] to move it to the **Applied Plans** list.
6. Click **OK**.

The Select plan date dialog box opens.



7. Click the calendar icon to select a **Start date**, then click **OK**.  
You can see an overview of each event's attributes from the **Tasks** tab, including whether it is a recurring event, the type of event, a short description, the date it is scheduled, etc.
8. Click the **Show Activities** drop-down list and choose an activity type to filter the list view: All, Appointments, Calls, To-dos or E-mail.

## Adding Events to the Client Record

You can add an event without applying an action plan. Use the button bar located on the **Tasks** tab of the Client record, or select an event from the Action menu.

### ▶ ↓ To add an event:

1. From the **Tasks** tab of the Client record, click the **Add Event** button; or select either **Add New To-Do** or **Add New Appointment** from the Action menu, then click the arrow button.

The Add a New Event dialog box opens.

2. Select the type of task and the activity details.

### ▶ ↓ To schedule a new to-do activity:

1. From the Add a New Event dialog box, click the **To-do** button.
2. Click the **Event Category** drop-down list and choose the type of To-do task you want to add: Meeting, To-do, Letter, Fax, Note or Lead.
3. Type a **Description** of the event in the field provided.
4. Select a level of **Priority** for this task: Low, Normal, High.
5. Schedule a **Date** for this event to occur:
  - click the calendar icon and choose a date; or
  - select the **No due date** check box if there is no specific date.

*Note: If you choose **No due date**, skip to step #9. Otherwise, continue.*
6. If this is a dated event, set up a reminder by entering the number of days you want to be reminded **BEFORE** the event starts.
7. End a reminder for an overdue event by entering the number of days **AFTER** the due date that you want to stop being reminded.
  - leave this field blank to continue the reminders until the event's completion.
8. Choose the frequency of the event:

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- One time event
  - Recurring event — click the **Setup Recurring Event Details** link. .
9. If the event has already occurred and you want to mark it done, select the **Completed?** check box, then:
    - click the calendar icon to enter the **Date completed**.
    - click the **Schedule a follow-up?** check box to enable this option.
  10. Click the **show on client web page** check box to display the task associated with the client on the client's Private Client Web Page view.
  11. Click the **Add/View Notes** button to add comments.
  12. Click **Done**; or **Enter Next** if you are scheduling another new event.

*Note: If you are entering a **Completed To-do**, select the check box, enter the **Date completed**, and choose to **Schedule a follow-up** event immediately. You are prompted to enter the details of the task.*

The task is created and you are returned to the Client Record.

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

### ▶ ↓ To schedule a phone call:

1. From the Add a New Event dialog box, click the **Phone Call** button.
2. Type a **Description** of the event in the field provided.
3. Select a level of **Priority** for this task: Low, Normal, High.
4. The remaining steps are the same as if you were adding a new To-do. Follow steps #5-12 of the topic, [To add a To-Do to the action plan](#).

### ▶ ↓ To schedule a new e-mail:

1. From the Add a New Event dialog box, click the **E-mail** button.
2. Type a **Description** of the event in the field provided.
3. Select a level of **Priority** for this task: Low, Normal, High.
4. Select the **E-mail Template** drop-down list and choose a template with a pre-written message.
5. The remaining steps are the same as if you were adding a new To-do. Follow steps #5-12 of the topic, [To schedule a new to-do activity](#).

### ▶ ↓ To schedule a new appointment:

1. From the Add a New Event dialog box, click the **Appointment** button.

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The screenshot shows a web-based dialog box for adding a new event. The window title is "Add/Edit Event -- Webpage Dialog". The main heading is "Add a New Event". Below the heading are icons for "To-do", "Phone Call", "Email", and "Appointment". The "Appointment" icon is selected. The form contains the following fields: "This To-Do is with" (Randy McLachlan), "Event Category" (Open House), "\*Description" (First Showing), "Priority" (Normal), "Start Date" (Thursday, 09/27/2007), "End Date" (Thursday, 09/27/2007), "\*Start" (8:00 AM), "All Day" checkbox, "Rest of Day" checkbox, "Location of Appointment", "Remind me" (60 Minutes), "Send reminder to my" (Web.Agent@fasload.mlxchange.com), "One time event" radio button, "Recurring event" radio button, "Setup Recurring Event Details" link, and "show on client web page" checkbox. At the bottom are buttons for "Add/View Notes", "Previous", "Enter Next", "Done", and "Cancel".

2. Click the **Event Category** drop-down list and choose the type of To-do task you want to add: Meeting, Call, To-do, Listing Appointment, Closing, Open House, Showing, Offer submitted, Offer accepted, or Sale closed.
3. Type a **Description** of the event in the field provided.
4. Select a level of **Priority** for this task: Low, Normal, High.
5. Schedule a **Start Date** and an **End Date** for this appointment by clicking the calendar icon and choosing a date from the calendar pop-up.
6. Select the **Start** and **End** drop-down lists and choose a time (in 15 minute intervals); or if the appointment has no time parameters:
  - select the **All Day** check box
  - specify a **Start** time then select the **Rest of Day** check box.
7. Enter the **Location of Appointment** in the field provided.
8. Select the **Reminder** check box, then choose a time from the list.
9. Choose an email address from the **Send reminder to my** drop-down list.
10. Choose the frequency of the event:
  - One time event
  - Recurring event — click the **Setup Recurring Event Details** link.
11. Click the **show on client web page** check box to display the task associated with the client on the client's Private Client Web Page view.
12. Click the **Add/View Notes** button to add comments.
13. Click **Done**; or **Enter Next** if you are scheduling another new event.

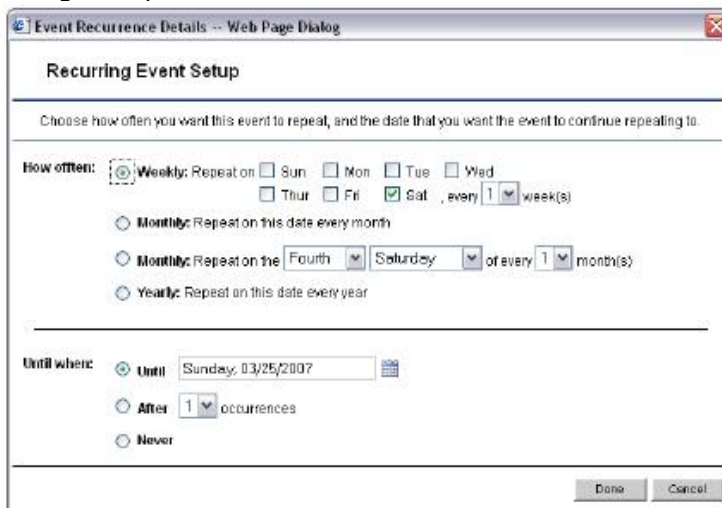
*Note: If there are conflicts between this appointment and others previously scheduled, a warning message appears. You can re-schedule the appointment or accept it.*

## Setting Up Recurring Events

You can set up repeating events by defining the frequency of occurrence and an end date to the event.

### ▶ ↓ To set up a repeating event:

1. From the Add/Edit Event dialog box, click the **Setup Recurring Event Details** link.  
The Recurring Event Setup dialog box opens.



2. In the **How often** section, specify:
  - **Weekly** — select the check boxes for each day of the week, then click the drop-down list and choose how many weeks in a month to repeat the event.
  - **Monthly** — select the first option to simply schedule the event to repeat every month; or, use the series of drop-down lists to be more specific.
  - **Yearly** — select this option for an annual event.
3. In the **Until When** section, specify:
  - **Until** — click the calendar icon and select an end date for the event.
  - **After** — specify the number of occurrences AFTER which the event will automatically stop.
  - **Never** — select this option for a continuing event with no end date.
4. Click **Done**.

## Client Labels

Client labels are mailing labels set up in a report format.

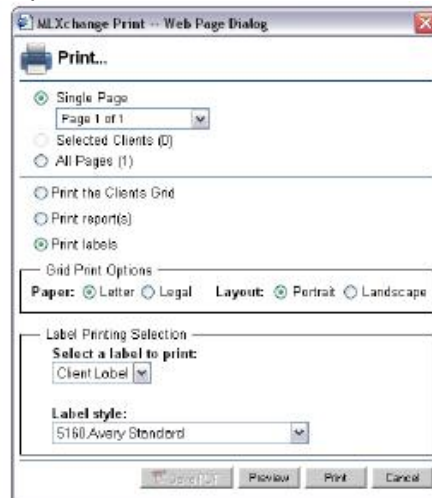
### ▶ ↓ To print client mailing labels:

1. From the Client Manager page:
  - select a single client record from the list, point to the Information icon to display the Quick Access menu, then click the **Print** icon; or
  - select multiple client records in the list, then click the **Print** button in the bottom right corner of the page.

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The Print dialog box opens.



2. Select the **Print labels** option, if it is not already selected.  
The label report page options appear in the top of the dialog box, and the **Label Printing Selection** options appear in the bottom of the dialog box.
3. In the **Label Printing Selection** section in the bottom of the dialog box, click:
  - the **Select a label to print** drop-down list and choose the label report, such as **Client Label**.
  - the **Label style** drop-down list and choose the Avery number that matches the kind of labels you are using.
4. In the top of the dialog box, choose one of the label page options:
  - **Single Page** — click the drop-down list and select a label page(s) to print, e.g. **Page 1 of 1**.
  - **Selected Clients (#)** — click this option to print labels for the clients currently selected on the Client Manager page.
  - **All Pages (#)** — select this option to print all pages of the label report.
5. Click **Print**.  
A standard Windows Print dialog box opens.
6. Choose any additional options (e.g., number of copies, destination printer, etc.).
  - click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.
7. Click **OK**.