



Setting Up a Portal Account Guide

Contents

Set-Up A Client Portal

View Client Portal Activity

Review Agent Portal Preferences

Portal FAQ's

www.mlssaz.com

Setting up a Client Portal

1. Go to Contact Management and click on the client's name
2. Click on the Portal tab
3. Click ON
4. Click Invite to Portal

New Customer

CONTACT DETAILS ACTIVITY SEARCHES/SUBSCRIPTIONS **PORTAL** MESSAGES NOTES LISTING NOTES MORE ▾



Client Portal: ON OFF

Your portal url: <http://portal.flexmls.com/bethannneynaber>

No listings automatically sent to this contact

Portal Listing Collections

Saved	0	Clear
Recommended	0	Clear
Hidden	0	Clear
Hidden by Agent	0	Clear

Viewed Listings are now on the [Activity Tab](#)

Portal Activity

Last Active

Most Recent Unsaved Search

No unsaved searches

Portal Account

Invite to Portal

5. When the invitation comes up — click on send.
6. When the client accepts the portal and creates a password, the button Invite to Portal will change to


Reset Account



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Your own portal account allows you to save listings, get updates automatically, and much more.

Brought to you by



BethAnn Neynaber
TUCSON ASSOCIATION OF REALTORS

SIGN UP **LOG IN**

Please sign in to get access to this feature.

Show

LOG IN

[Forgot password?](#)

Your subscription updates will be here.

Start a new search...

85641 Pool

Viewing 26 of 26

Most Recent **FILTER SEARCH**

SEARCHES

- 85641 Pool
- View All

LISTINGS

- Saved 0
- Recommended 0
- Hidden 0

\$335,000

17262 S Sienna Bluffs Trail

Active 5 BD 3 BA 2,998 SF

\$660,000

14731 E Triangle M Ranch Road

Active 4 BD 4 BA 3,612 SF

\$334,900

14001 E Hay Bale Trail

Active 3 BD 2 BA 2,442 SF

\$322,500

10792 S SANDY LAKE Drive

Active 3 BD 2 BA 2,359 SF

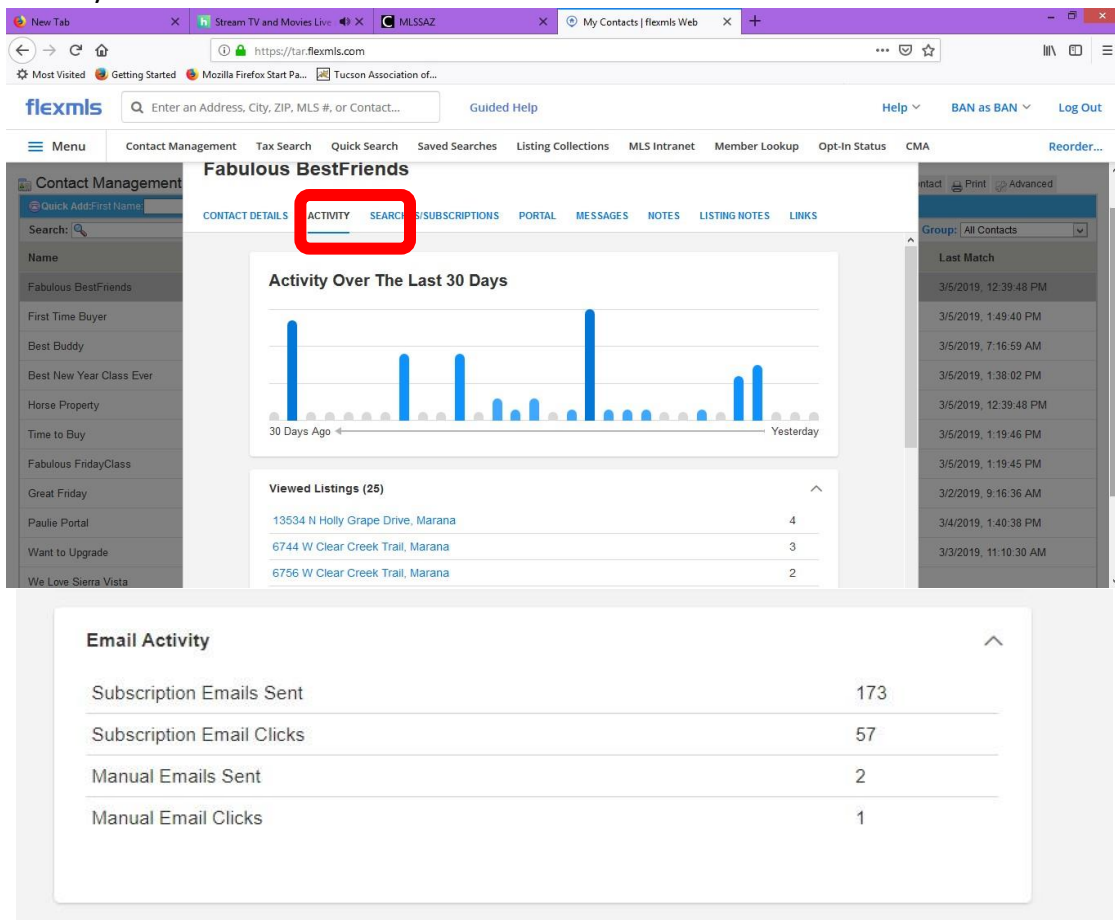
Your client will be searching here.

See your Client's Activity

See the days they view and what exact listings they are looking at—even how many times they review the property.

Click on the contact name

Click the Activity tab



The screenshot shows the flexmls.com interface for a contact named 'Fabulous BestFriends'. The 'ACTIVITY' tab is selected and highlighted with a red box. Below the tab is a bar chart titled 'Activity Over The Last 30 Days' showing activity levels over time. Below the chart is a table of 'Viewed Listings (25)' with the following data:

Address	Count
13534 N Holly Grape Drive, Marana	4
6744 W Clear Creek Trail, Marana	3
6796 W Clear Creek Trail, Marana	2

At the bottom of the interface, an 'Email Activity' summary is displayed:

Category	Count
Subscription Emails Sent	173
Subscription Email Clicks	57
Manual Emails Sent	2
Manual Email Clicks	1



Review Your Agent Portal Preferences

To set up your default portal and subscription preferences:

Click MENU

Click **Portal Preferences** under Preferences on the menu.

If you make changes, be sure to click **Save** at the bottom of the page.

Portal

Intro	+
Portal Basics	+
My Listings	+
IDX Lead Generation	+
Intro Email	+
News Feed	+
Default Subscription Settings	+
Listing Content Options	+
Emailed Listing Links	+

All your changes are saved. DISCARD **SAVE**



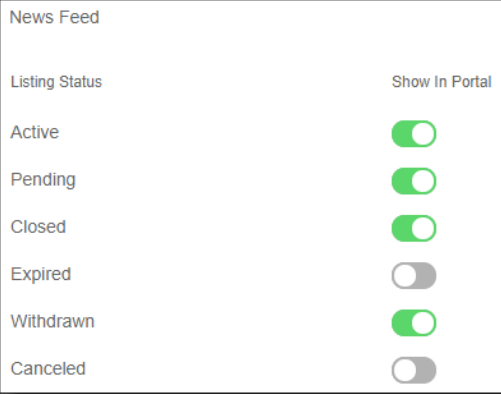
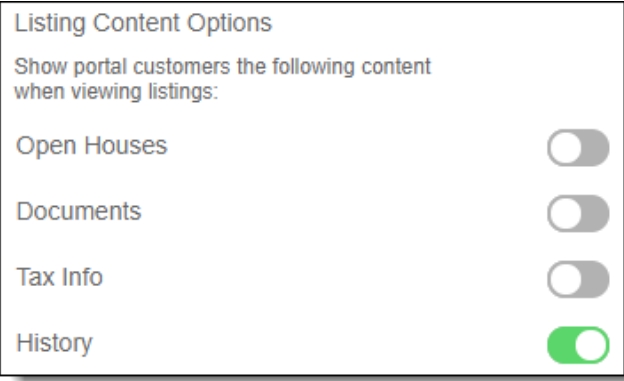
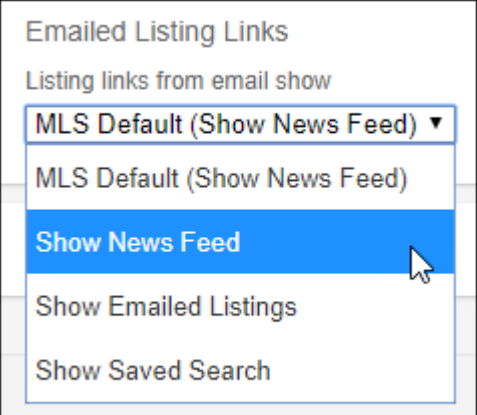
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To change portal settings for an individual contact, click Contact Management and select name of contact and click PORTAL.

Option	Description
Intro	Watch a video for a brief overview of how the Flexmls Portal helps you collaborate with your clients.
Portal Basics	Enter a name for your portal. The portal name is displayed in the web address that your clients use to access the portal. Even though all your clients use the same URL, each client logs in with a unique username and password. Clients see only the searches and subscriptions that you have saved to their contact record in Flexmls. When your portal is enabled, you can invite any of your contacts to use it.
My Listings	Choose whether to display your listings on the portal home page.
IDX Lead Generation	<p>If you are not a Flexmls IDX subscriber, you can watch a quick video to learn more.</p> <p>If you are a Flexmls IDX subscriber, you can create featured searches for your market. By default, this setting is On.</p> <p>You can also select which fields are required for users when they sign up for a portal. By default, a name and email address are required for all portal users. Using the toggles, indicate whether a physical address and phone number are also required.</p> <p>Select the email address that will receive leads generated through your portal. The default selection is your primary email address. Use the drop-down menu to select an alternate email address from your profile.</p>
Intro Email	Select whether the Send Invite checkbox on the Portal tab of Contact Management is checked by default. Set up a default email subject line and introductory message for portal invitation emails. A default message is provided, or you can type your own message. You can also customize messages individually before they are sent.
News Feed	Select which statuses are displayed in the news feed for portals and subscriptions. The news feed contains the listings your contact has received via subscription emails. If Show in Portal is set to On, listings with that status will display in the news feed, even when the listing's status no longer matches the status that was defined in the original search. Listings in the news feed will always display the listing's current status.



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Option	Description
	
Default Subscription Settings	Select the listing changes that will trigger a subscription to automatically send listings to your contacts. Click the Use Inherited Defaults button to use the default settings as determined by the MLS.
Listing Content Options	Choose which content appears by default for your contacts when they view listings in the portal and subscription emails. These options may vary by MLS. 
Emailed Listing Links	Select where your contacts will be directed when they click a link in a subscription email. 

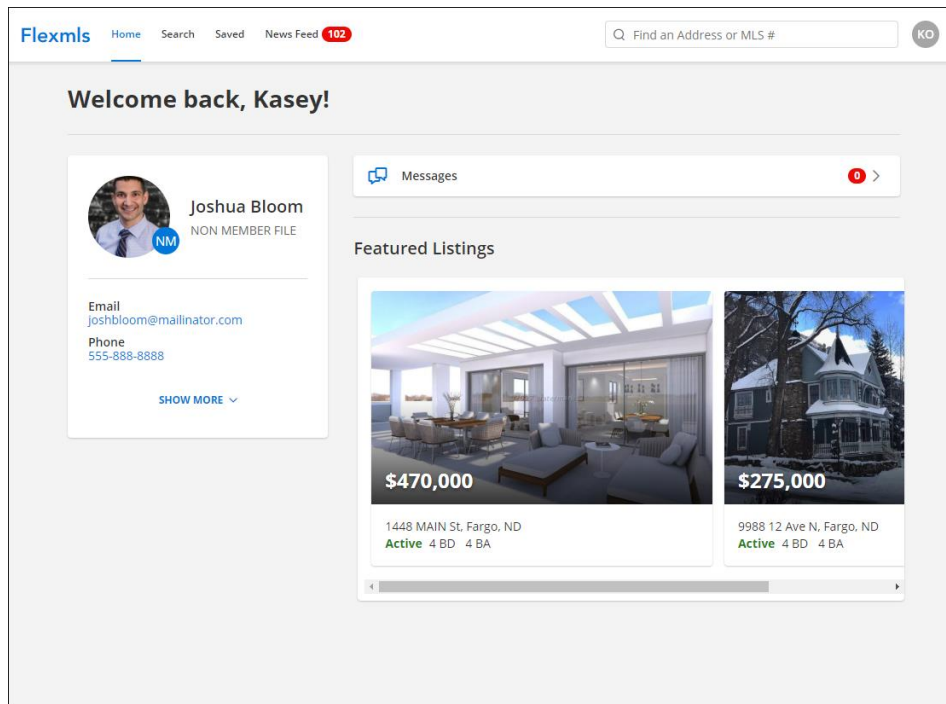


Option	Description
	<p>You can use the default set by your MLS or select one of the following options:</p> <ul style="list-style-type: none">• Show News Feed - Show the selected listing inside the news feed.• Show Emailed Listings - Show just the listings that were included in the email.• Show Saved Search - Open the selected listing inside the saved search.
Other	<p>If the Switch to Classic Portals button is available, you can revert the format of your portal and emailed listings to the Classic tabbed version. BE AWARE: This setting affects all portals and listing emails. Clients do not have the option to search in the classic version.</p>

Flexmls Portal FAQ

Q. What is the Flexmls Portal?

A. The Flexmls Portal is a personalized Flexmls website that you can use to communicate and collaborate with your clients. Each contact's portal is customized for them and also contains your branding and contact information.



Q. What are the benefits of the Flexmls Portal for my clients?

A. Your contacts can use the Flexmls Portal to review the results of listing searches you have saved for them. If you subscribe to Flexmls IDX 2.0, the portal also allows your clients to create and save their own listing searches.



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The information in the portal comes directly from Flexmls, so your clients always see current price and status information. Your clients can also mark listings as favorites or hide listings that they are not interested in. If they have questions about a property or would like to schedule a showing, they can easily send a message to you (their agent).

[Q. Is the Flexmls Portal the same thing as a subscription?](#)

A. No. While subscription emails are also based on saved searches, automatic email messages include only listings that were recently updated or are new search results. The Flexmls Portal shows your client all the current results for the searches that you have created for them. However, the Flexmls Portal and subscription emails do work together. When a client with access to the portal clicks a link in a subscription email, the portal opens automatically.

[Q. How do I give my contacts access to the Flexmls Portal?](#)

A. First, you enable your agent portal and set preferences using the Portal Preferences page. Then you can give access to individual contacts using Contact Management.

[Q. I have a lot of contacts. Can I turn on the Flexmls Portal for everyone at once?](#)

A. Yes. From Contact Management, click the **Advanced** menu in the top right and then click **Create Portal Accounts** or **Create Portal Accounts with Invite**. The *Create Portal Accounts with Invite* option enables the portal for every contact and sends the default portal greeting as configured in Portal Preferences. The *Create Portal Accounts* option enables the portal for every contact but does not send any notifications.

[Q. How do I control the listings that my contact sees in their portal?](#)

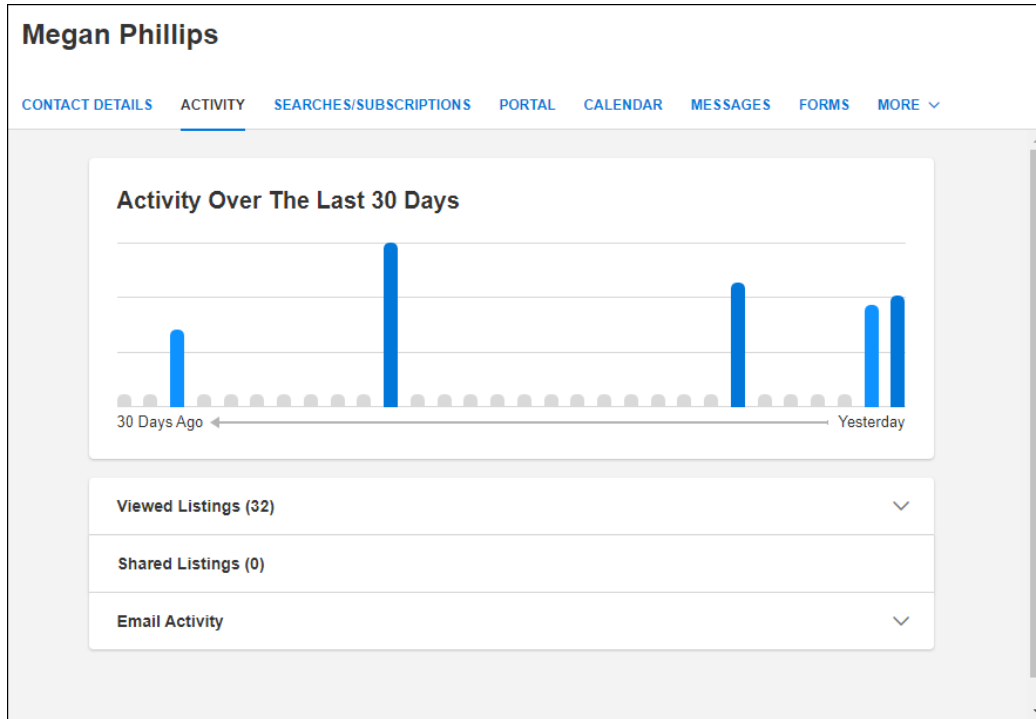
A. Your client will see listings based on the searches and listing collections that you have set up for them.

[Q. How do I know if my client is using the portal?](#)

A. Use the Activity tab in Contact Details to see which listings your client has viewed or shared. The Activity tab also contains a graph showing the contact's past 30 days of activity. Any time a contact views a listing, it is registered as contact activity.



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In Contact Management, you can see the last time the client logged on to the portal via a computer. Click on the contact's name, then click the **PORTAL** tab. The most recent logon date and time are listed under the *Portal Activity* heading.

You can receive a message every time your client logs on to the portal from a computer. Click **CONTACT MANAGEMENT** and click **MESSAGES** tab. Click the checkbox to be notified with a message when the contact logs in to the customer portal. To stop receiving login messages from all clients, you can go to General Preferences and select the setting Suspend all portal login notice messages.



Megan Phillips

CONTACT DETAILS ACTIVITY SEARCHES/SUBSCRIPTIONS PORTAL CALENDAR **MESSAGES** FORMS MORE ▾

Contact Messages:

Send a message to me when Megan Phillips logs into the portal [Write a message to Megan Phillips](#)

[Expand all messages](#) [Collapse all messages](#) [Search messages](#)

[18-3881] 3710 6 Street E	From: Megan Phillips	11/21/2018
[18-5000] 3420 WHEATLAND PINES Drive S	From: Megan Phillips	11/21/2018
Login notification: Megan Phillips logged in on 11/20/2018 at 11:34 AM	From: flexmls	11/20/2018
[17-5849] 2514 MCLEOD Drive E	From: Megan Phillips	11/13/2018
[17-1488] 3506 6TH Street E	From: Megan Phillips	11/02/2018
Login notification: Megan Phillips logged in on 10/9/2018 at 3:03 PM	From: flexmls	10/09/2018
[18-3771] Re: 770 VILLA PARK Way	To: Megan Phillips	10/02/2018
[18-5290] 403 11TH Avenue S	From: Megan Phillips	09/26/2018

Q. Does my contact see everything I do on listings?

A. Your contact sees only listing information that is designated as public by your MLS.

Q. Can I track what my contact views in the Flexmls Portal?

A. You can see which listings your client has viewed by clicking the *Viewed Listings* heading on the Activity tab in Contact Management. To see which listings, they have saved or hidden, click the links under the *Portal Listing Collections* heading on the Portal tab in Contact Management.

Megan Phillips

CONTACT DETAILS ACTIVITY SEARCHES/SUBSCRIPTIONS **PORTAL** CALENDAR MESSAGES FORMS MORE ▾

Client Portal: ON OFF
Your portal url: <http://portal.flexmls.com/>

View News Feed Viewed Listings are now on the Activity Tab

Portal Listing Collections

Saved	11	Clear
Recommended	9	Clear
Hidden	13	Clear
Hidden by Agent	1	Clear
\$1M+	5	Delete
Showings for Sat	3	Delete

Portal Activity
Last Active: 01/14/2019 04:24 PM

Q. Can my contacts create their own searches in the Flexmls Portal?

A. Your contacts can search for listings via the Flexmls Portal, but saving is available only if the agent has a Flexmls IDX 2.0 subscription. For more information about subscribing to Flexmls IDX, send an email to idx@fbsdata.com.



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Q. My contact can't sign in to the Flexmls Portal. What do I do?

A. Make sure that the client has typed their email address correctly. If they do not remember their password or otherwise cannot log in, you can reset the portal account. In Contact Management, click on the contact's name, click the **Portal** tab, and then click **Reset Account**. The client will receive an email allowing them to change the email address and password on their portal account.

Q. Can I resend the portal invitation to a contact?

A. Yes. You can resend portal invitations via the Flexmls mobile app.

Q. What is the difference between Flexmls Portal and Classic Portal?

A. The Classic Portal is an older version of the Flexmls Portal that is not available in all MLSs. Even if the Classic Portal is available in your MLS, we recommend using the Flexmls Portal instead for the best client experience. For example, the Classic Portal does not allow clients to search for listings without an IDX subscription, where the Flexmls Portal does.