*FlexMLS created by FBS*

# FlexMLS Training Manual

## Specialty Classes

*Map Searching*
*Listing Carts*
*Portals*
*Showing Time*

# Table of Contents

# Add A Field

## Acreage Info

| | |
|---|---|
| Pasture Acres | Tillable Acres |
| Timber Acres | Lake/Pond |

## Activities

| | |
|---|---|
| Tour of Homes Date | Open House Date |

## Basement

| | |
|---|---|
| Partially Finished | Unfinished |
| None | Cellar |
| Finished | Outside Entry |
| Walkout Finished | Walkout Part Finished |
| Walkout Unfinished | |

## Building Info

| | |
|---|---|
| Building # | # Building Floors |
| # Condo Units | Location in Building |
| # of Assigned Parking | Addtl Storage |
| Maintenance Fee | |

## Closets

| | |
|---|---|
| Level 1 | Level 2 |
| Level 3 | Basement |

## Construction

| | |
|---|---|
| Aluminum | Block |
| Brick | Brk/Ven |
| Frame – Wood | Log |

## Construction Continued

| | |
|---|---|
| Stone | Stucco |
| Vinyl | Other/NA |

## Contract Info

| | |
|---|---|
| Days on Market | Cumulative DOM |
| Original List Price | Listing Date |
| Expiration Date | Listing Price |
| Property Sub Type | List Price/SqFt |

## Exterior

| | |
|---|---|
| Balcony | Creek |
| Pond | See Remarks |
| None | Handic Prov |
| Hot Tub | Lake |
| Water Front | Patio |
| Deck | Pool – Abv Ground |
| Pool – In Ground | Porch |
| Sauna/Steam | Tennis Court |
| Out Buildings | |

## Farm Features

| | |
|---|---|
| Barn/Util | Cistern |
| Dairy | Equipment |
| Irrigation System | Livestock |
| Orchard | Poultry |
| Silo/Grain | Stable |

# Farm Features

| | |
|---|---|
| Tobacco Barn | Und Allot |
| Well Water | Other |

# Fencing

| | |
|---|---|
| Brick | Chain Link |
| Electric | Farm |
| Full Fence | None |
| Partial Fence | Privacy Fence |
| SplitRail | Stone |
| Wood | Other |

# Fireplaces

| | |
|---|---|
| Level 1 | Level 2 |
| Level 3 | Basement |

# Foundation

| | |
|---|---|
| Concrete Blk | Crawl Space |
| Poured Concrete | Slab |
| Other | |

# Garage/Parking

| | |
|---|---|
| 1 Car Garage | 2 Car Garage |
| 2 ½ Car Garage | 3 Car Garage |
| 4 Car Garage | 5 Car Garage |
| 6+ Car Garage | 1 Car Carport |
| 2 Car Carport | 3+ Car Carport |
| Detached | Off-Street Parking |
| Attached | Entry Front |
| Entry Rear | Entry Side |

# Garage/Parking Continued

| | |
|---|---|
| Lower Level | No Garage |
| Street | See Remarks |
| Driveway | None |

# General Property Description

| | |
|---|---|
| Total # of Rooms | Total # of Bedrooms |
| Baths – Full | Baths – ½ |
| Total Baths | Owner Name |
| First Floor MBR | Laundry Level |
| Total Closets | Total Fireplaces |
| Lien Holder App Reqd | SqFt – Total Finished |
| Above Grade Unfin | Nonconform SqFt UF |
| Below Grade Finished | Below Grade Unfin |
| Nonconform SqFt Fin | Above Grade Fin |
| SqFt – Total Unfin | SqFt - Source |
| Age | Year Built |
| Acres | Lot SF |
| Lot SF Source | Lot Dimensions |
| HOA Fee | Stories |
| Style | Const Stat |
| Builder # | Assumable |
| Sold As-Is | M Struct Flood Plain |
| City Tax | County Tax |
| # Upper Floor Bedrooms | # 2nd Floor Bedrms |
| # 1st Floor Bedrooms | # Basement Bedrms |

# Heating/Cooling

| | |
|---|---|
| Central Air | Electric Heat |
| Forced Air Heat | Gas Heat |
| Geo Heat | Gravity Heat |
| Heat Pump | Radiant Heat |
| Steam Heat | Window/Wall Unit |
| Other | AC: None |

# Incl. in Maintenance

| | |
|---|---|
| Cable TV | Electric |
| Exterior Maint. | Gas |
| Groundskeeping | Heat |
| Internet | Mstr Ins |
| Security | Sewer |
| Snow Removal | Trash |
| Other – See Remarks | Water |

# Location, Tax & Legal Info

| | |
|---|---|
| Street # | St Dir |
| Street | St Suffix |
| Unit # | City |
| County | State/Province |
| Zip Code | Area |
| Sub Area | Parcel ID |
| Deed Bk | Pg # |
| Subdivision | Block |
| Lot | Sub-Lot |
| School District | Municipality |

# Location, Tax & Legal Info Continued

| | |
|---|---|
| Preservation District | Directions |
| Contract Type | Coop Comm |
| Variable Rate Comm | Disclosure |
| Other Contract | Geo Lat |
| Geo Lon | |

# Lot Description

| | |
|---|---|
| Irregular | AddLndAve |
| Corner | Covt/Restr |
| Cul De Sac | DeadEnd |
| Easement | Flood Insurance Req |
| Cleared | Golf Course |
| See Remarks | Level |
| Sidewalk | Storm Sewer |
| Will Divide | Wooded |
| Zero Lot Line | |

# Media

| | |
|---|---|
| Pictures | Documents |
| Videos | |

# Member

| | |
|---|---|
| Listing/Selling Member | Listing/Selling Office |
| Listing/Selling Company | |

# Remarks & Misc

| | |
|---|---|
| Public Remarks | Agent Notes |
| Agent Notes Cont'd | |

## Roof

| | |
|---|---|
| Flat | Metal |
| Shingle | Tile/Slate |
| Other | |

## Rooms

| | |
|---|---|
| Kitchen | Dining Area |
| Full Bath | Formal Dining |
| Florida Room | Family Room |
| Great Room | Half Bath |
| Eat In Kitchen | Living Room |
| Master Bedroom | Master Bath |
| Office | Separate Apt. |
| Study | Other |

## Status Change Info

| | |
|---|---|
| Status | Status Change Date |
| Pending Date | Contingent |
| Sold Date | Sold Price |
| Sold Price/SqFt | Financing |
| Sold Terms | Cancel Date |
| Fallthrough Date | Temp Off-Mkt Date |

## Sub/Condo Amenities

| | |
|---|---|
| Marina | Additional Strg |
| Dock | Elevator |
| Fitness Room | Gated Community |
| Golf Course | Guest Room |
| Int Wheel Chr | Laundry Facility |

## Sub/Condo Amenities Continued

| | |
|---|---|
| Clubhouse | Pets Allowed |
| Playground | Pool |
| Rental Allowed | Hot Tub |
| Secured Building | Other – See Remarks |
| Sauna/Steam | Tennis Court |

## Supplement

Has Supplement

## To Show

| | |
|---|---|
| Model Home | Appointment Only |
| Call Owner | Combo Box |
| Constr. Not Started | CSS |
| GLAR Key | Call List Agent |
| No Appt. | No Sign |
| Pets-Caution | Showing Service |
| ShowingTime | Under Construction |
| Vacant | |

## Utilities

| | |
|---|---|
| Cistern Water | Electric |
| Fuel: Propane | Fuel: Natural |
| None | Public Sewer |
| Public Water | Septic System |
| Well Water | Other |

## Virtual Tours

Has Virtual Tour

flexmls

Help ▾    SS ▾

Dashboard | Search | Daily Functions | Contacts | Taxes | Statistics | Preferences | Spark

Home ▾                                                        Customize ▾

Search | Daily Functions | Conta
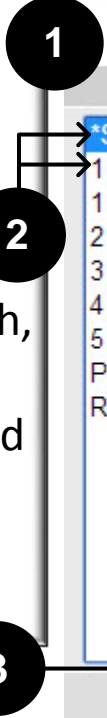
Quick Search
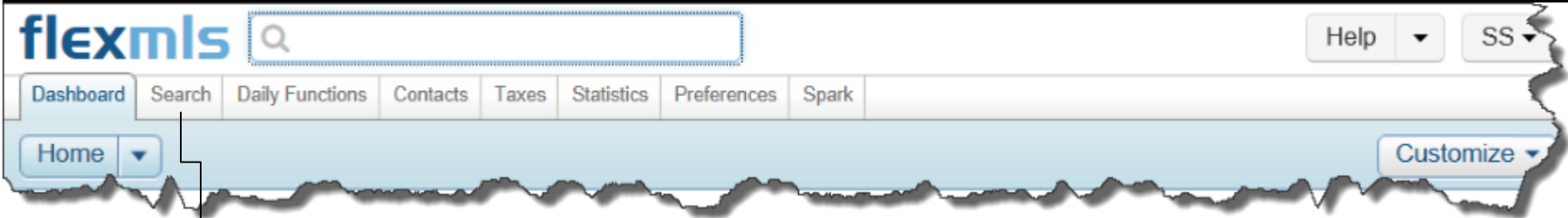
Map Search ←

Map Searches are a more advanced version of the typical Quick Search. By selecting Map Search you will not only have access to all the typical Criteria we use for searching, you will also be able to use Map Overlays and custom drawn Shapes to narrow your results by location.

To use a Map Search, first Click the Search Tab, then Click Map Search.

**①**

Now select your preferred Quick Search, typically either the Residential or the Solid Earth Style.

**②**

To Begin click Use.

**③**

## Available Quick Searches for Map Search

**Available Quick Searches**

My Views
My Saved Sorts
My Reports
My Quick Searches
My Map Overlays
My Exports
General Preferences
Portal Preferences
IDX Manager
Default Map
Broker Data Sharing
User Profiles

*Solid Earth Style
1 - Residential (Louisville MLS)
1 - Residential
2 - Multi Family (Louisville MLS)
3 - Land/Lots (Louisville MLS)
4 - Rental (Louisville MLS)
5 - Multi-Property (Louisville MLS)
Public Property Search (Louisville MLS)
Report Generation (Louisville MLS)

*Solid Earth Style
*Residential*

Status
Property Sub Type
Area
Listing Price
Total # Bedrooms
Total Baths
Above Grade Finished
SqFt -Total Finished
Status Change Date
Street
[more fields]

✔ Use

On the left side of the Map Search window you will see the basic search criteria that we can use in all Quick Searches.

On the right side of the Map Search window you will see the Map view, with available Drawing Tools. You can view the map as a Basic Map or as a Satellite Imagery Map.

**1**

**2**

There are three drawing tools you can use to narrow your results, but one of them isn't usually going to be used.

As you can see, the Rectangle tool isn't very useful as it cannot be rotated, and therefore can only create vertical and horizontal rectangles.
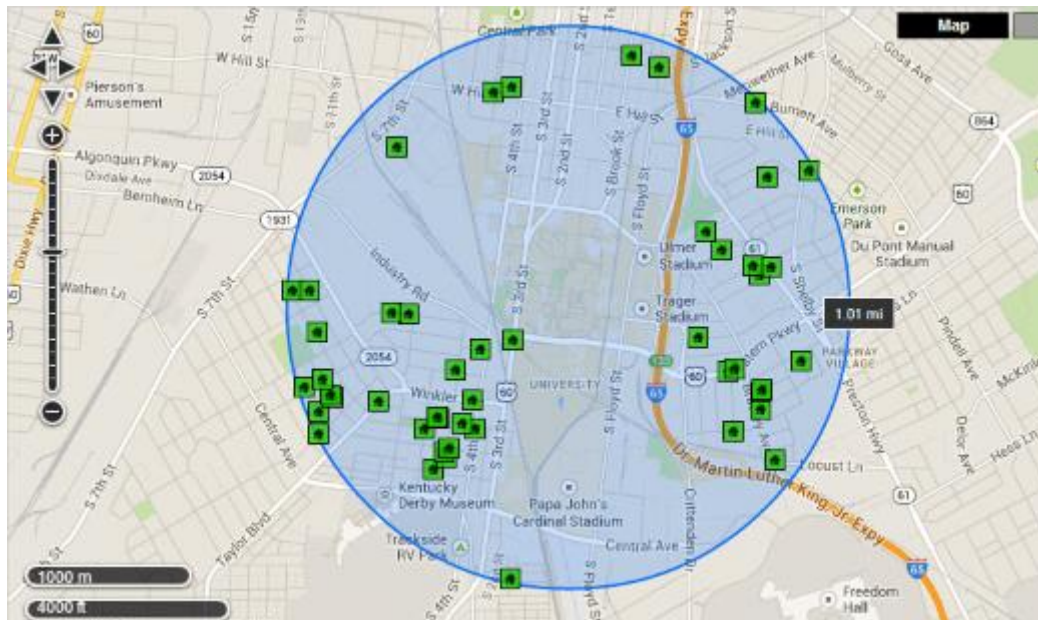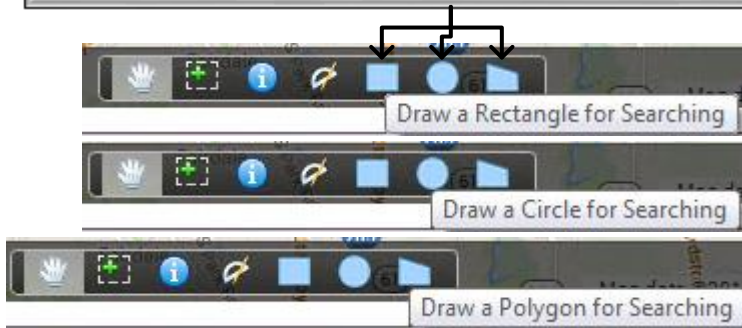






Circles are a very effective method of creating a Radius Search. In a later example I will show you a method using multiple circles and a polygon to very effectively limit the listings to a buyer's very specific location demands.

Polygons are used whenever a specific area needs to be selected. Using a Polygon you can draw any shape, with any number of sides.
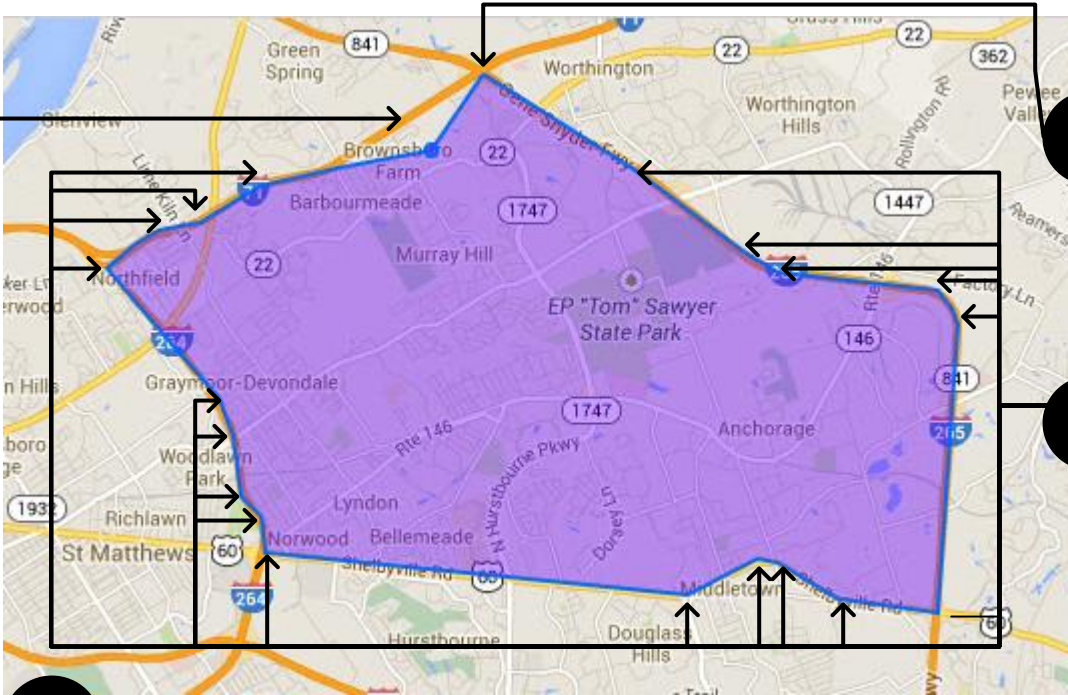
Draw a Polygon for Searching

**1**

To use a Polygon, first Select the Polygon tool from the bottom of the Map.

**2**

Now you need to select the first Corner your drawing needs. Click once to place a corner, do not hold down the mouse button.

**3**

Now, moving to each of the next corners, click once per corner, following whatever path your shape requires.

**4**

When you arrive at the final corner you need to place, double click it to finish the Polygon. Once you double click you should see the Polygon change to a light blue color, and listings should start to load in the drawn area.

If you make a mistake while drawing, don't worry, continue the shape, double-click to finish, then you go edit the shape to correct your mistake.

Once a shape has been finished FlexMLS will load the listings that match any criteria and the drawn shape. As humans we occasionally make mistakes, so don't worry, FlexMLS added an Edit Shape Mode where we can easily correct or adjust any drawn shape.
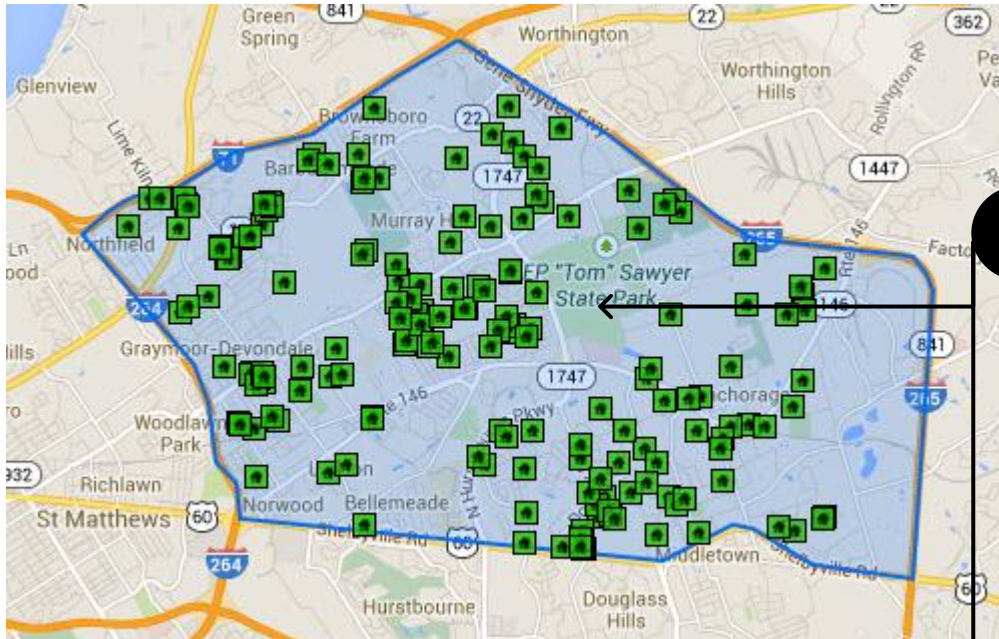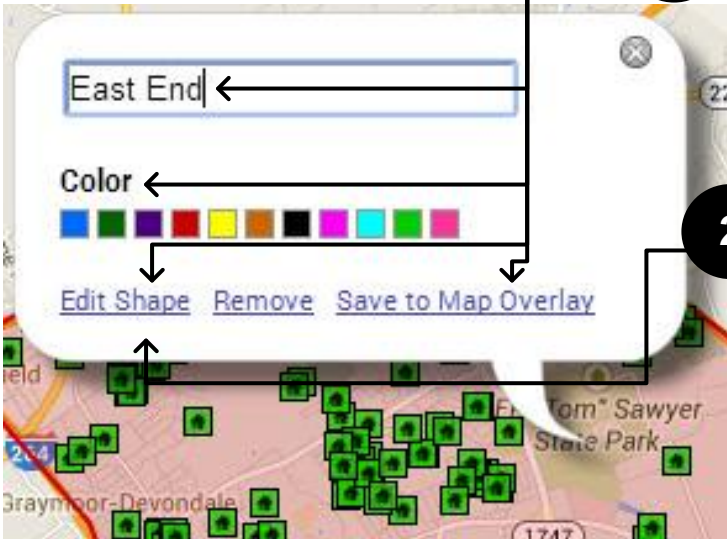


**1**

To correct or adjust a Drawn Shape, simply click anywhere inside the shape, NOT on a listing.

Now you should get additional Shape options including Edit Shape.

**2**

**1** The Edit Shape Menu allows you to name a Shape, choose a color for the Shape, Edit the Shape of a Shape, and Save the Shape as a Map Overlay you can use anytime you need it.

**2** If the original Shape you drew is incorrect, whether you made a mistake, or the "needs" have changed, clicking Edit Shape will allow you to correct the Shape.

Once you click Edit Shape you will see yellow circles on each corner you created, as well as the central point between each corner. Any of these Yellow Circles can be moved. To do so, Click and Hold your mouse on any circle, then move it to a new location. If the entire area needs to be shifted, click and hold the center yellow circle and move it to the new center of the Shape.

**3**
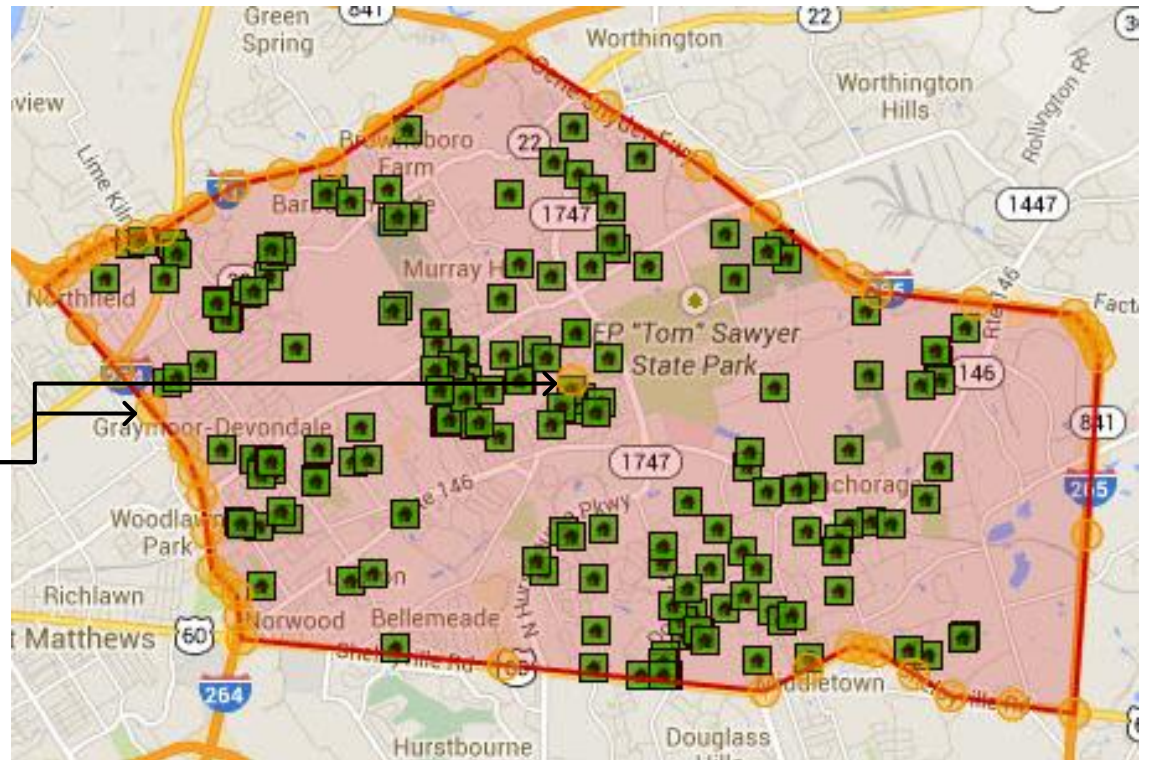
Once you have redrawn your shape, simply click Leave Edit Shape Mode to finish the Shape. If this had been a Saved Map Overlay, be sure you re-save the map overlay by again clicking inside the shape, click edit, and then click Save to Map Overlay.

**4**
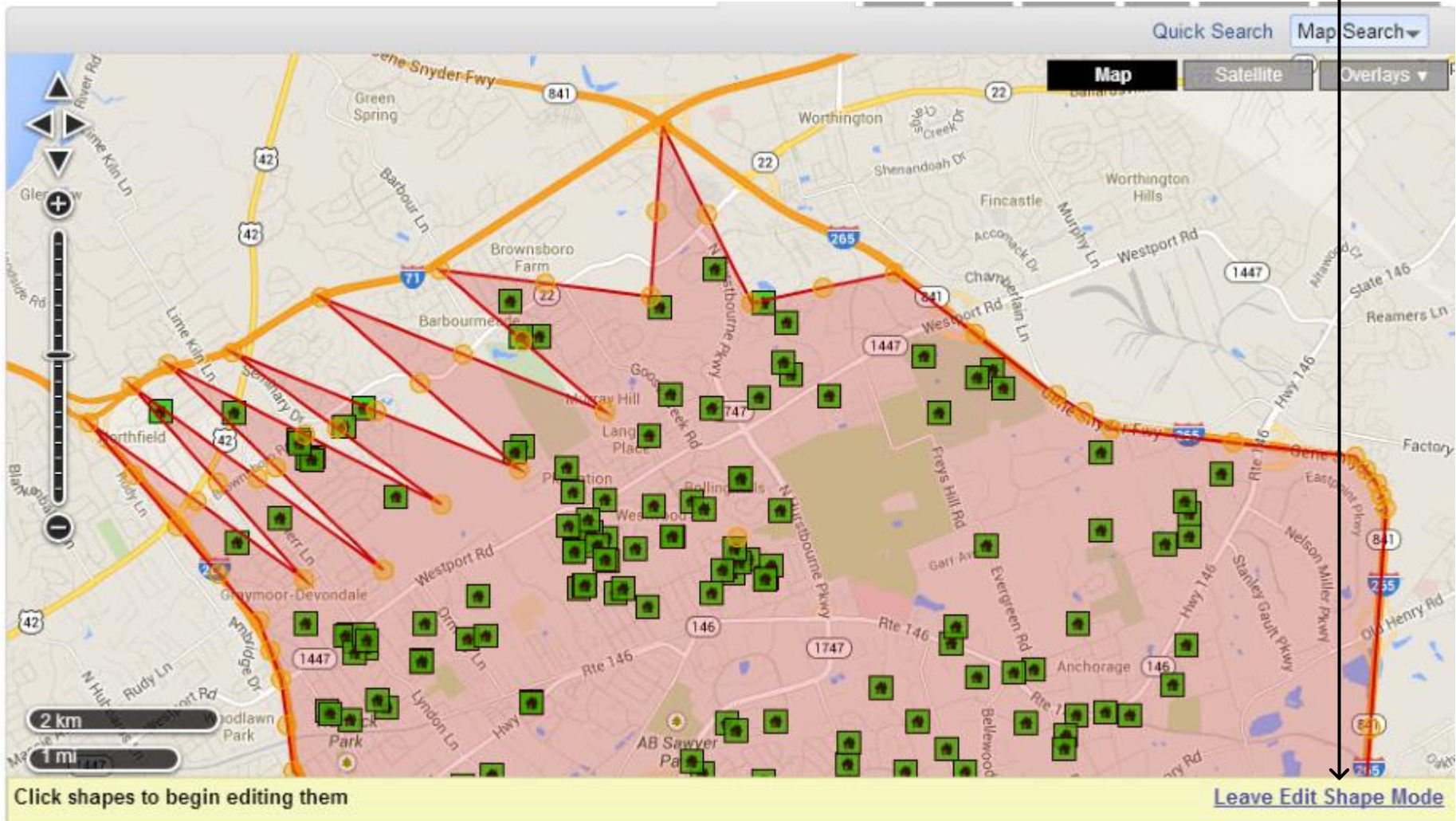
When you click Save to Map Overlay, inside the Edit Shape window, you will see a Save Polygons as My Map Overlay window. You need to name the Overlay, or add it to an Existing Overlay. Now you should also select which Shapes you wish to save, you can save multiple drawn shapes to an individual Map Overlay.
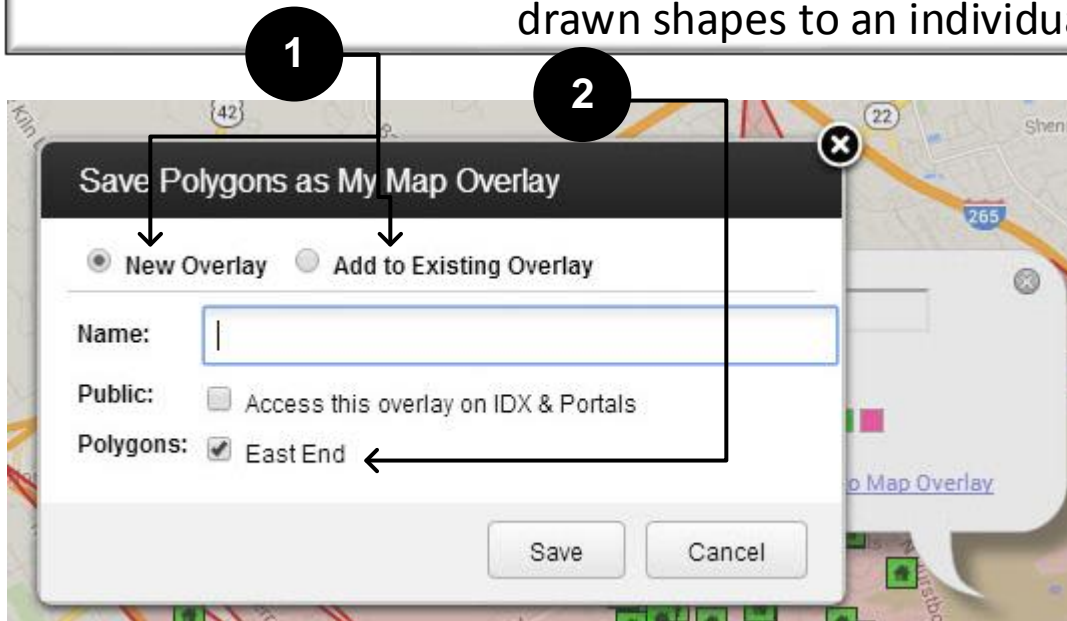


Although most Overlays will probably contain only one shape, you can use multiple shapes per overlay. Some reasons to do this may be to create a "favorite neighborhoods" overlay, and be able to see them all at once, but you can still select to use just one Shape from a Multi-Shape Overlay if you needed to narrow results to that specific area.

If you edit a previously created Map Overlay's Shape, be sure to re-save that Overlay using the Add to Existing Overlay option. Otherwise you will end up duplicating your saved Map Overlays.

There are two ways to use a Saved Map Overlay: It can either be used as Search Criteria, to limit your results to only listings inside the Drawn Shape(s), or you can Overlay it on your map, which does not limit the results to listings inside or outside the Shape(s), but shows the Drawn Shape(s) on the map so you can see which listings fall inside and outside of the Drawn Shape(s).



**1** The Overlays Dropdown menu on the top right of the Map allows you to Overlay the Shape on your Map.

**2** By clicking the MLS#, Address, Map Overlay bar on the top of the Search Criteria section you will see a list of all your Saved Map Overlays, double-click one to use it as search criteria.

If you just use the Map Overlay as an Overlay, then you will see the Shape(s) on the map, but listings can show up anywhere the actual criteria allows. Below is an example of a Map Overlay used as Criteria (in red) and the Zip Codes Overlay being used as an actual Overlay.
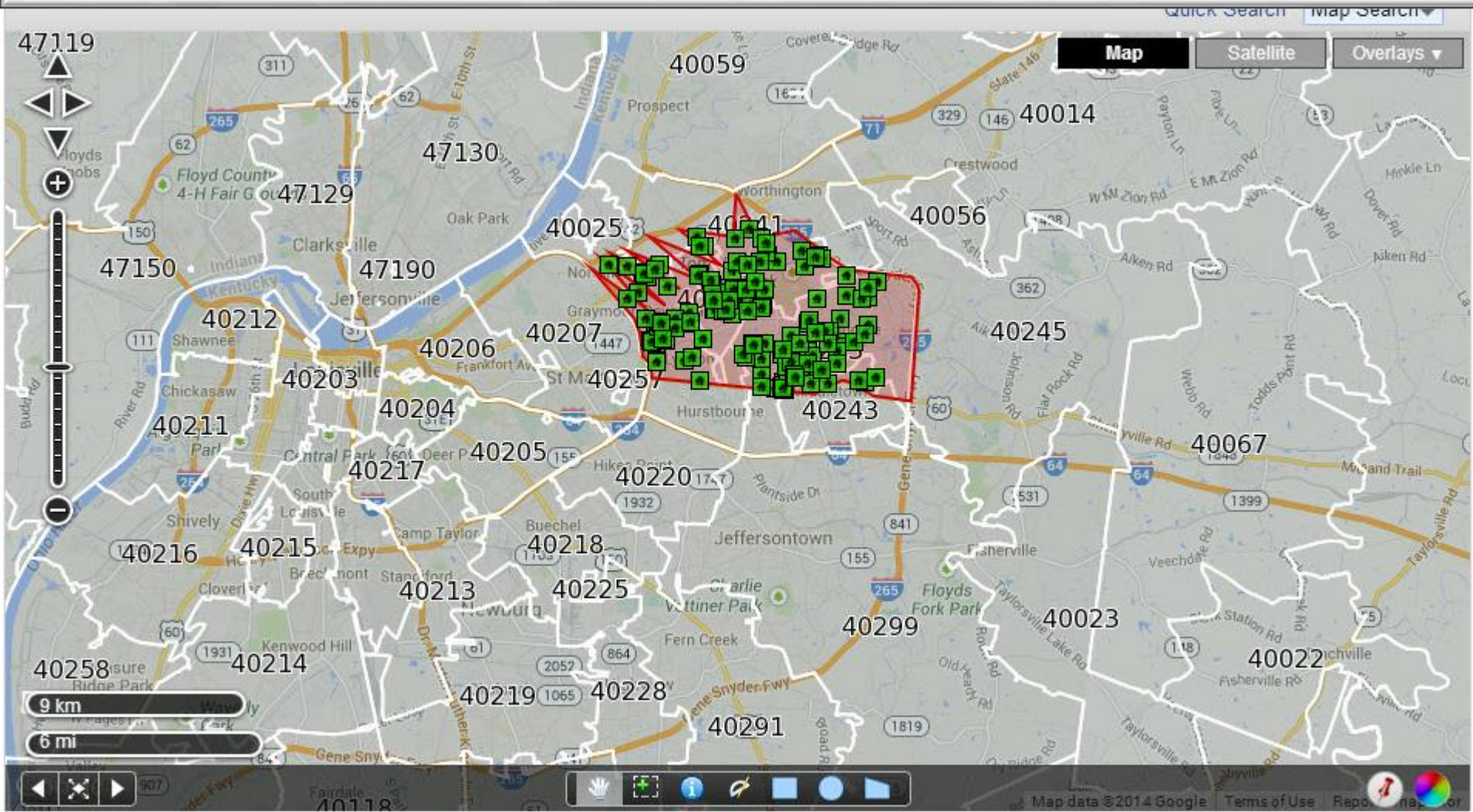
When using Shapes as Search Criteria you have the choice between seeing listings Within the Shape(s), in the Intersection of Multiple Shapes, or Not Within the Shape(s). Up next I will show you how a combination of these options will allow you to be very specific with your locations.
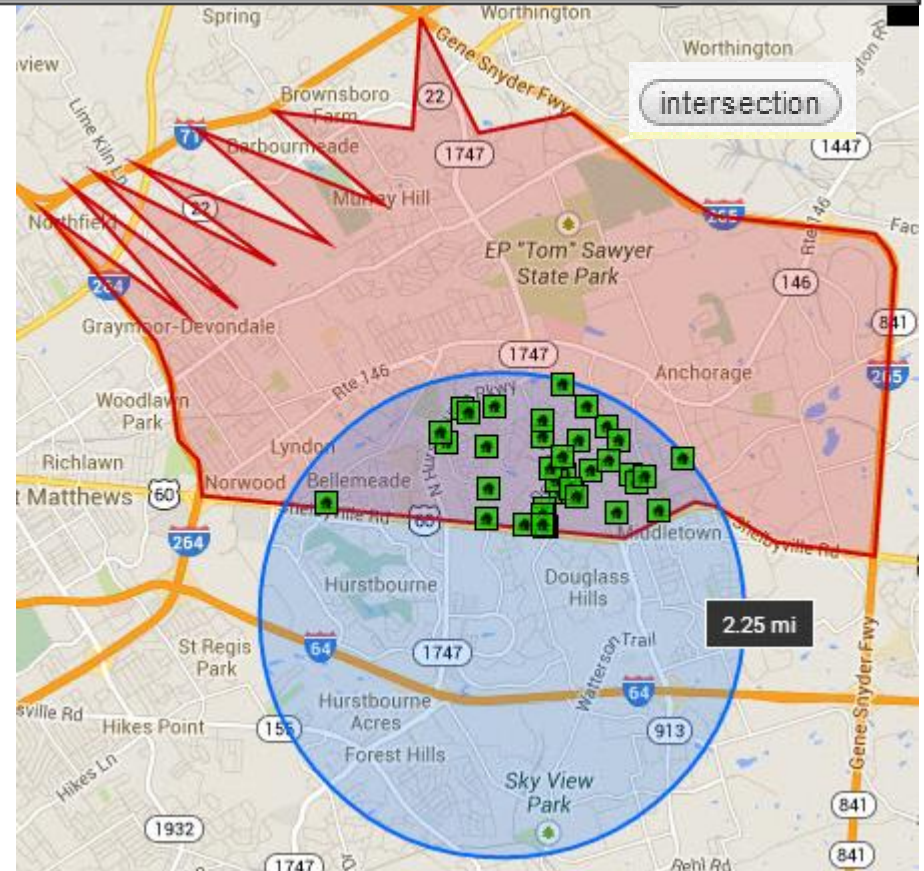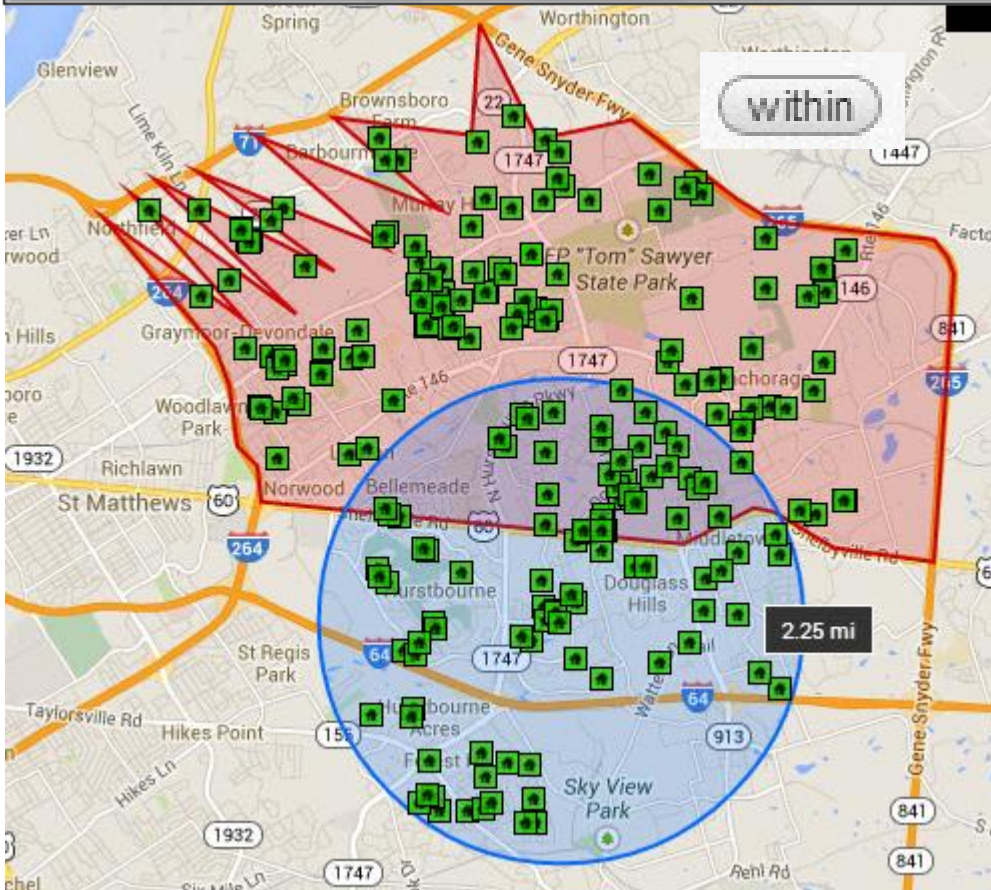


By Clicking the word "Within", next to where it says Shape, you can cycle through all three options.

By using a Combination of Map Overlays and additional Shapes, you can really customize your search. Below is an Example of two overlapping radius searches, with the Intersection as criteria, and a custom Map Overlay using the Not Within Criteria. Using this method I can say my buyer wants to live within 4 miles of each radius' center, but not within the Airport Map Overlay.
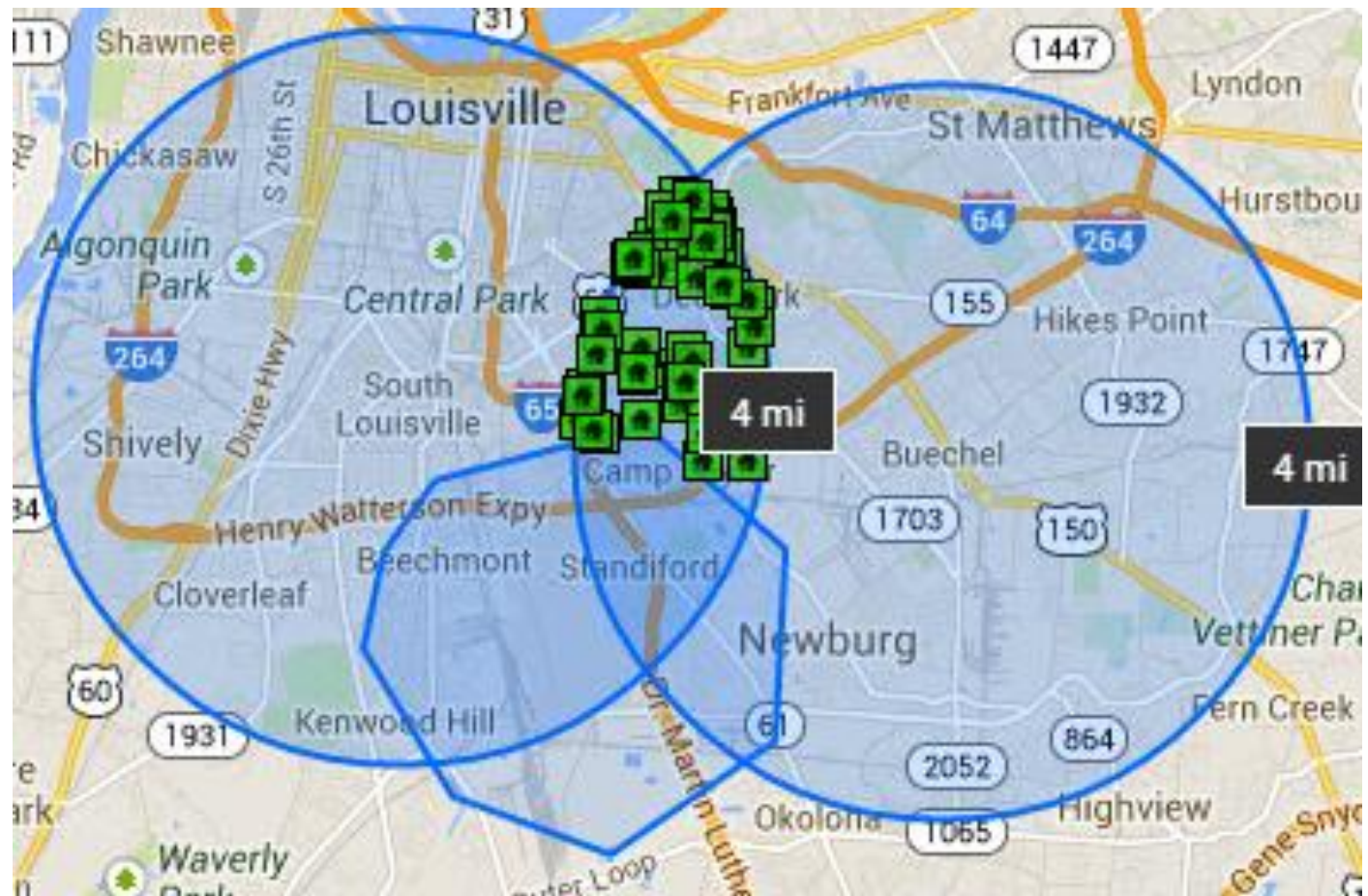
View Results: 167 ◀

| MLS #, address or map overlay | Browse » |

**Shape** (within)
× ■ East End

☑ **Status** of Active 📅 ✕

Active
Pending
Contingent
Closed
Expired
Temp Off Market

See All and Select Date Ranges...

☐ **Property Sub Type** ✕

Single Family Residential
Condo/Patio Homes
Farm
Auction

See All...

☐ **Area** ✕

00-Central Downtown District/Old Louisville
01-Dtwn Old Louisville/Shively/West Lou
02-Buchertwn/Hghlnds/Germantwn
03-Clifton/Crescent Hill/St Matthews
04-Pleasure Rdg/Valley Station/Shively
05-Auburndale/Fairdale/IroquoisPrk/Shively

View Results: 167                    Clear

Once you have drawn your Shape(s) and selected how they will be used as Criteria, you can add any additional Criteria your current search requires.

Once you have saved a Map Overlay, it can be used in a normal quick search as searchable Criteria simply by adding it using the MLS#, address, or Map Overlay Bar at the top of the Search Criteria section on the left of any search.

# Final Tip:

Using a Drawn Area as a search criteria may not pull up every listing that is actually located within the drawn area. If an agent has incorrectly, or hasn't at all, mapped their listing it may not show up when using the Map Search. **Be Sure to Map ALL Your Own Listings!**

In order to do a CMA you may want to create a Radius around the listing your running the CMA on. To do so, you will either need to use the address or an MLS number to begin.

*Solid Earth Style *work on behalf of a contact*

**1a**

View Results: 5,727

7327 Autumn Bent Way

Top Hit   7327 Autumn Bent Way  (street address)

MLS Fields    double click or hit Enter to add to search

Street Address   7327 Autumn Bent Way

☑ Status of Active 📅
☐ Property Sub Type
☐ Area
☐ Listing Price

**If the address doesn't pull anything up, try a neighboring address.**

*Solid Earth Style *work on behalf of a*

**1b**

View Results: 5,728

1097763

Top Hit   1097763  (mls #)

MLS Fields    double click or hit Enter to add to search

MLS #   1097763
Street Address   1097763

☑ Status of Active 📅
☐ Property Sub Type
☐ Area
☐ Listing Price

Once you have found an MLS # or address that works for you, click the Star or House icon to get additional options. The bottom left option say Radius Search, click here to add the radius around the listing.

**2**

7327 Autumn Bent Way
Crestwood, KY 40014
Parcel ID: 0000-0000-0000
More Info | Move Listing

**Listing Activity:**
1097763   10/14/2005   Closed      $ 106,900   Select
1096025   08/01/2005   Cancelled   $ 109,500   Select

Radius Search | Street View | Bird's Eye | Zoom Here

On the radius search pop-up add the distance in miles you wish to use, you can enter 0.5 for a half mile.

**3**

Radius Search  1.0   miles from here

Create Radius
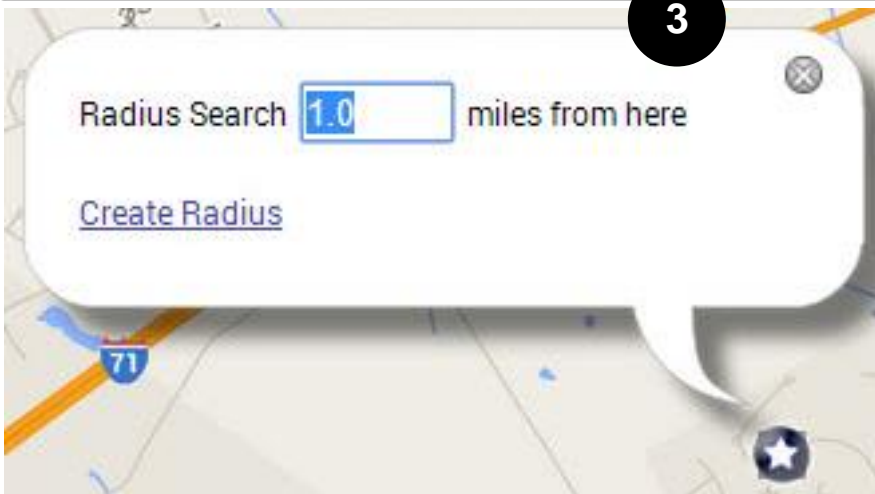
Now we have a circle with a one mile radius surrounding our listing, but you will notice the only thing that shows up is the original MLS # or address we entered. This is because of the criteria currently being used. We need to adjust our criteria. First, close the circle's pop-up.

**3**

Now we need to remove either the MLS number or address we originally used as our search. To do so, click the X next to the Address or MLS # under our criteria section.

**4**

Now you should start seeing only Active listings, that fall inside your circle. From here you can add any other criteria, including status types and dates, that you want to use to find your comparable listings.

## What are they?

Listing Carts are a new concept. They differ from Saved Searches in the fact that Saved Searches save the criteria, meaning the listings the search loads will change with time and changes in the market. Saved Listing Carts save actual listings, using their MLS #s. Any listing added to a Listing Cart is always going to be in that cart, unless you or an associated contact remove it from that cart. Anything you place in a cart will be there the next time you load that cart. The listings will show their current price and status everytime.

## Why should/would I use them?

Listing Carts are great for both buyers and sellers. You may have other ideas on how to make use of Listing Carts, but here are a few examples we have come up with.

**Buyers –**
For buyers, the best use for a Listing Cart is actually a Showing Cart. Any listing you ever show your client should get added to a Listing Cart that you intelligently named after your client and the time frame or date you showed the listings. Now you and your client can keep track of how those listings progress. You can quickly remember every listing you have shown that client, and you can show them the current price and status of that listing.

**Sellers –**
For sellers we recommend a "Competition Cart". Place any listings you consider in direct competition with your client's listing into a Cart so you and your client can track how their competition is doing, all the way through the closing.

Search | Daily Functions | Conta

Quick Search
Map Search
CMA
MLS #
Address
My Listings
Office Listings
Company Listings
Office/Member
Listing Carts
Saved Searches
RPR
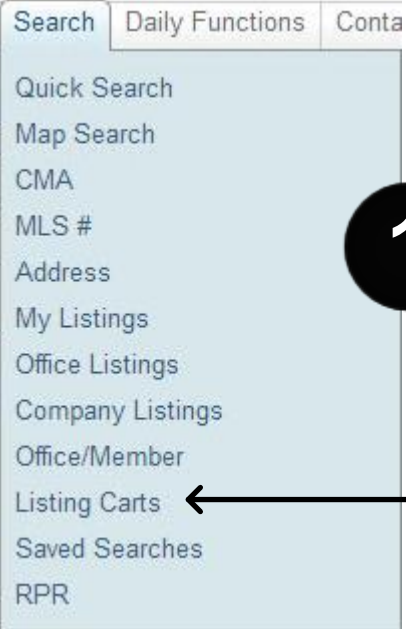
**1** If you click the Listing Carts button under the Search tab you will be taken to the Show My Listing Carts window. Here you can only view previously created carts, and their contents. You cannot create a new cart from this location. Listing Carts can only be created from a Search Results page once you have selected listings.

**2** To view the contents of a previously saved cart, select the listing cart across the left side, then click View Contents.

flexmls  Q Quick Launch                                                                 Help  ▾  TM as SREA ▾

Dashboard | Add/Change | Search | Daily Functions | Contacts | Taxes | Statistics | Preferences | Other | Spark | Admin

## Show My Listing Carts

| Listing Carts | Description |
|---|---|
| Area: 6 Looksee (4 listings)<br>CMA Leonard (16 listings)<br>Flex 2pm Tue (7 listings)<br>Flex Jan 20 9am (4 listings)<br>Flex MLS Cart 1 (3 listings)<br>Flex Wed 2pm (4 listings)<br>Friday 9am Tim (4 listings)<br>Friday Visit (3 listings)<br>Jan 30th 2pm (5 listings)<br>Monday Street View (5 listings)<br>ryan means (7 listings)<br>Ryan 1 (5 listings)<br>Ryan Means Showings (7 listings)<br>Ryan's Competition (8 listings)<br>Showings 2/22 Ryan Means (4 listings)<br>Test (5 listings) | The cart Ryan Means Showings contains 7 listings.<br><br>It uses the view Residential.<br><br>View contents of this cart (7 listings) |
| Rename    Remove | |

To create a new listing cart, perform a search and view the results. On the Search Results screen, select the listings you would like to include in your cart, and click "Save." On the save screen, select "Save Cart."

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Once viewing the contents of a Listing Cart you can select listings and remove them from the Listing Cart by clicking the Remove button.

**3**   **4**

From this window we have all the same email and print options we are used to.

If your contact is setup with a Portal they will also be able to see the Listing Carts that you have associated with that contact. To see which carts are associated with which contacts, go to your Contact Management window, select a contact, then Click on Portal.

**5**

**6** The Carts associated with a Contact will list after the initial 5 default Carts that all Portals contain. Click a Cart name to view its contents. Click the Red X to empty a default Cart.

Dashboard | Add/Change | Search | Daily Functions | Contacts | Taxes | Statistics | Preferences | Other | Spam | Admin

**Contact Management**                                  Add Contact | Print | Advanced

Quick Add: First Name: [    ]  Last Name: [    ]  E-mail: [    ]  ☐ Portal ➕ Add

Search 🔍 [                    ]                         Group: All Contacts ▾

| Name | Portal | Phone | E-mail | Favorites |
|------|--------|-------|--------|-----------|
| Ryan & Randi Means | ON | | ryanmeans@semonin.com | 2 |
| Ryan Means & Tim Moore | ON | | ryanmeans@semonin.com | 34 |
| Tim Moore | ON | | timmaria.moore@gmail.com | 0 |

👤 Ryan Means & Tim Moore | 🔍 Searches/Auto E-mail | 🖼 Portal | 💬 Messages | 📝 Notes | 📋 Listing Notes | 🔗 Links

Client Portal: ● ON ○ OFF  🖼 View Portal  📧 E-mail Portal Link
Your portal url:  http://my.flexmls.com/semoninrealtors

**Portal Listing Carts**

| Cart | Count |
|------|-------|
| Recommended | 6 X |
| Favorites | 34 X |
| Possibilities | 18 X |
| Rejects | 32 X |
| Removed | 4 X |
| 2pm | 6 |
| Area 3 | 4 |
| Area 3 200k | 4 |
| Area 8 150 to 250 k | 4 |
| Area 8 example | 5 |
| Area 8888 | 4 |
| Close house place | 3 |
| Evening visits | 4 |

**Listings Viewed By Ryan Means & Tim Moore (view all...)**

| MLS # | Address | Views |
|-------|---------|-------|
| 1379564 | 17917 Meremont Ridge Ct | 2 |
| 1378626 | 105 Waterstone Way | 1 |
| 1378230 | 1056 E Saint Catherine St | 1 |
| 1353965 | 1122 Lafontenay Ct | 1 |
| 1380120 | 14712 Forbes Cir | 1 |
| 1378741 | 1742 Frankfort Ave | 1 |
| 1371713 | 218 Marshall Dr | 1 |
| 1379465 | 529 Forest Bend Cir | 1 |
| 1380606 | 14205 Willow Grove Cir | 1 |
| 1373104 | 410 Gablewood Cir | 1 |
| 1376702 | 116 Bonner Ave | 1 |

When running any search you have the option to Save the Search. In order to get the option to save a Listing Cart, you need to have selected listings. If you haven't selected listings you will not see the Save Selected As option.

**1**



Once you have selected listings, click Save and then Save Selected As to begin saving a Listing Cart.

**2**

**3**

**Save Selected**

Cart Name

☑ Save to My Listing Carts
☐ Save cart for

Save     Cancel

If you are creating a Listing Cart for yourself and aren't trying to associate it with a contact, then you can name that cart and click Save to finish.

**4**

**5**

If you are creating a cart for a client, then you have to be "Working on Behalf of a Contact", which involves adding another step to the process, back on the Search results page.

To save a Listing Cart for a contact, you need to see their name on the second line of the Save Selected window.

**Save Selected**

Cart Name

☑ Save to My Listing Carts
☐ Save cart for Ryan Means & Tim Moore

Save     Cancel

When creating a Listing Cart for a contact, we must first work on behalf of that contact. To do so, click Work On Behalf of a Contact. Then begin typing your contacts name, and select them from the list that populates.

**1**

**2**

Once selected, you may begin the normal Listing Cart process.

Now that you are "working on behalf of a contact" that contacts name will show up on the second line of the Save Selected As window. Be sure to click Save Cart for "Your Contact's Name" to associate the Cart with that Contact. Name your Cart and click Save.

**5**

Save Selected

Cart Name

☑ Save to My Listing Carts
☐ Save cart for Ryan Means & Tim Moore

Save    Cancel
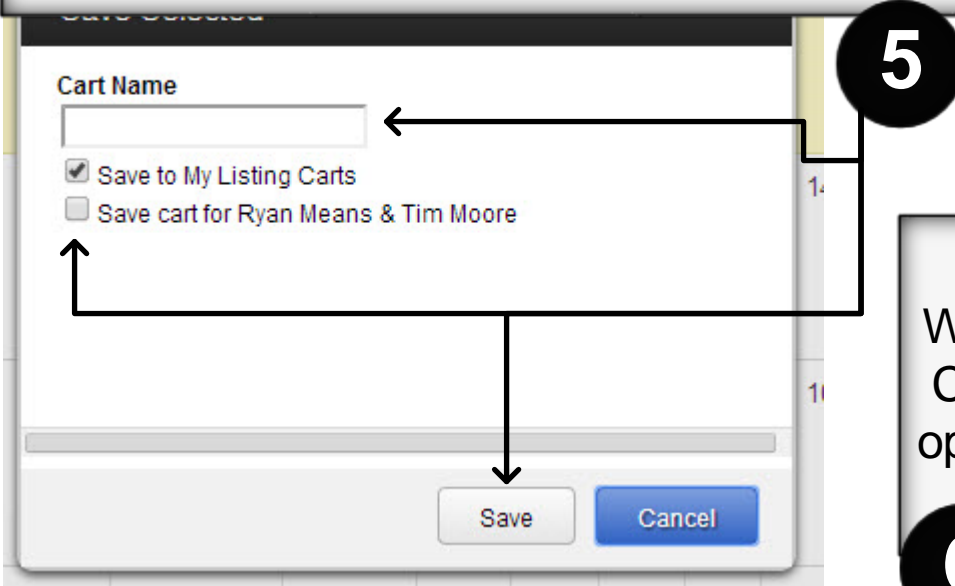
You can Add to or Replace a Cart as well. When you go to name the Cart, a list of Saved Cart names will populate. Click one to get the option of Adding to or Replacing the previously Saved Cart.

**6**

Save Selected

Cart Name

Area; 6 Looksee
CMA Leonard          Tim Moore
Flex 2pm Tue
Flex Jan 20 9am
Flex MLS Cart 1

Save    Cancel

Save Selected

Cart Name
Friday Visit

☑ Save to My Listing Carts
⦿ Add to Cart
○ Replace Cart
☑ Save cart for Ryan Means & Tim Moore

Save    Cancel
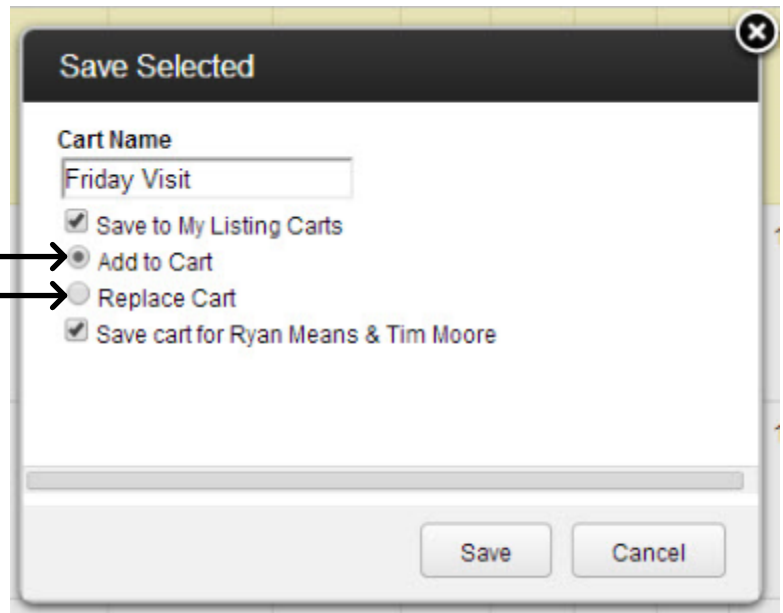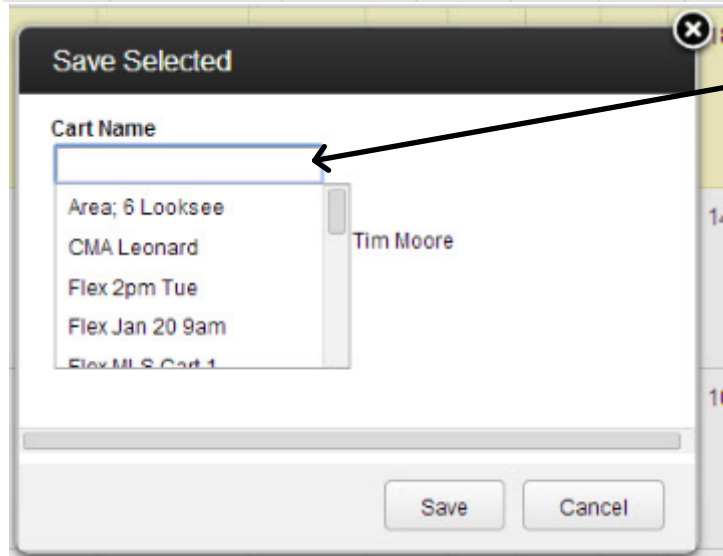
As with most software, the first step to setting up a portal is going into your Portal Preferences. To do so, go to Preferences/Portal Preferences.

**1**

Preferences | Other | Spark

My Profile
My Views
My Saved Sorts
My Reports
My Quick Searches
My Map Overlays
My Exports
General Preferences
Portal Preferences
IDX Manage   Edit your Portal preferences
Default Map

The first time you go to Portal preferences you will have to setup your Portal Address. This can be anything you want, but most people use their name, with no spaces.

**2**

earch | unctions | Contacts | Taxes | Statistics | Preferences | Other | Spark

**Portal**

**Name:** [                    ]  Suggest

Your portal url: http://my.flexmls.com/

*Note that this name will be used by all clients who log in to your Portal*

**Status:** ○ ON  ● OFF

Save

**3**

To see the rest of the Portal Options you will need to turn the Status to On, and then click Save. Once you do, you should get a list of options under the Status field. Next we will discuss these options.

Once you have saved the Portal Address you will be given options similar to our Email options. The first option you see is to setup the wording for your automated email. FlexMLS puts some default text in the message for you, but you should add some info about the FlexMLS Portal video the client will have a chance to watch the first time they login.

Next you determine the information you want your clients to have access to inside the portal. My recommendation is to use the Horizontal Business Card to the email signature, the Lou Full Report W/ Contact, and the Custom Vertical Business Card for your Branding.

**5**

Business Card:   Profile Card Horizontal

Presented by
Ryan Means
Semonin REALTORS, Semonin Louisville Office
502-718-7126
502-718-7126
ryanmeans@semonin.com

**Portal Preferences**

Start Position:  Map

List view
○ [1 - Residential *]
○ Use view associated with search/link

List sort
○ Sort listings by New or Recently Changed first
○ Use the sort associated with the view

☑ Detail
☑ Report  LOU Full Report W/ Contact   +
☐ Tax Info
☑ Supplement
☐ History
☐ Documents
☑ Open Houses
☑ Mortgage Calculator
☑ Photos
☑ Video(s)
☑ Virtual Tour
☑ Map
☑ Compare
☑ Messages
☑ Branding
Business card:   Custom Vertical Business Card
Card Orientation:  Left
[    ] Accent Background Color

Save

**Portal**

Name:   ryanmeans   ⟳ Suggest
Your portal url: http://my.flexmls.com/ryanmeans
Note that this name will be used by all clients who log in to your Portal

Status:   ○ ON  ○ OFF

**Email Greeting**

☑ When Creating New Accounts, Automatically Send Email Greeting

Templates:  [                    ]

Subject:   A "Portal" for listing information

Message:

I've set up a customized website called a Portal for you. Using this site, you can keep track of listings, send me messages, and keep track of listings you like and dislike. Follow the link below and enter your login information to begin using your Portal. Once you are on the website, be sure to save the address as a Favorite so you can easily visit again. In the lower right panel of the Home Screen, you will be able to change your password to whatever you like.

The first time you login there will be an option to view a short video explaining

**4**

| Contacts | Taxes | Statistics | P |

Contact Management
Contact Summary
Presentation
Reverse Prospecting
Automatic E-Mails
My Sent E-Mails

**1** Once you have setup your Portal Preferences you can begin working on setting up contacts. The first step of which is to go to your Contact Management window.

**2**

First you will need to add your contact.

| Dashboard | Search | Daily Functions | Contacts | Taxes | Statistics | Preferences | Other | Spark |

## Contact Management

➕ Add Contact  🖨 Print  📎 Advanced

**Quick Add:** First Name: [____] Last Name: [____] E-mail: [____] ☐ Portal ➕ Add

**Search:** 🔍 [____]  **Group:** All Contacts ▼

| Name | Portal | Phone | E-mail |
|------|--------|-------|--------|
| Ryan & Randi Means | OFF | | ryanmeans@semonin.com |
| Ryan Means | ON | | ryanmeans@semonin.com |

| 👤 Ryan & Randi Means | 🔍 Searches/Auto E-mail | 📇 Portal | 📧 Messages | 📝 Notes | 📋 Listing Notes | 🔗 Links |

👤 **Means, Ryan**
**Means, Randi** (Additional Contact)
ryanmeans@semonin.com
randimeans@semonin.com

👥 **Group:** Buyer

📞 **Primary:**    **Mobile:**
   **Home:**    **Other:**
   **Office:**    **Pager:**
   **Fax:**

🏠 **Home:**
   **Office:**

📄 **Reverse Prospecting:**    Enabled

**E-mail Activity:**    Auto: 0, Manual: 0, Viewed: 0

**Total Activity:**    Auto: 0, Manual: 0, Viewed: 0

📝 Edit Contact   ✖ Remove   🔴 Deactivate   ➡ Transfer

When adding a contact you will need to enter a display name and a first/last name for each contact. For an additional contact or spouse, be sure to enter both names in the display name section. For multiple email addresses, you can click the Green + sign to add more Email Address Lines.

**1**

Dashboard | Search | Daily Functions | Contacts | Taxes | Statistics | Preferences | Other | Spark

**Contact Management**                                    🖶 Print   Advanced

Name: Ryan & Randi Means

Name: Ryan ____ Means

Additional Contact: Randi ____ Means

Organization: ____

E-Mail: ryanmeans@semonin.com
randimeans@semonin.com ✖ ➕ Add

Groups: Buyer ▾ ✖ ➕ Add
Edit Group List

Primary: ____   Mobile: ____
Home: ____   Other: ____
Office: ____   Pager: ____
Fax: ____

☑ Reverse Prospecting
No Additional Info ➕ Add

☐ Create a Portal Account for this Contact
An e-mail with the portal login name and password will automatically be sent

I do not recommend you create a Portal Account for your contacts from the Add Contact window. Creating the account here will send a default password to the client, and the client will be given portal access before the portal contains any information.

**2**

Click Add Contact to finish.

🚫 Cancel   👤 Add Contact

Once you have added the contact you will want to create a saved search or listing cart for that contact. To begin creating a Saved Search you can go to the Searches/Auto Email tab under that contact in your Contact Management Window.

**1**

Once on the Searches/Auto Email tab you can click the Add button to begin adding Saved Search(es). Adding a Saved Search from this tab automatically associates the Search with the selected contact.

**2**

Dashboard | Search | Daily Functions | Contacts | Taxes | Statistics | Preferences | Other | Spark

**Contact Management**

✚ Add Contact   🖶 Print   Advanced

**Quick Add: First Name:** [        ] **Last Name:** [        ] **E-mail:** [        ]  ☐ Portal ✚ Add

**Search:** 🔍 [                                    ]   **Group:** All Contacts ▾

| Name | Portal | Phone | E-mail |
|---|---|---|---|
| Ryan & Randi Means | OFF | | ryanmeans@semonin.com |
| Ryan Means | ON | | ryanmeans@semonin.com |

Ryan & Randi Means | Searches/Auto E-mail | Portal | Messages | Notes | Listing Notes | Links

**Searches**                              **Results**

[                    ]                    **Auto E-mail**

                                          **Search Parameters**

✚ Add   Rename   Edit   ✖ Remove

**View**

**Listing Activity Report**

Once you click the Add button a small pop-up window will appear. If you have already created the Saved Search you want to associate with this contact then you can select it from this list(**1**). If you haven't created it, simply click Create New Quick Search(**2**).

Once you click Create New Quick Search you will be taken to the normal Available Quick Searches window to begin creating a new search that will be associated with the selected contact. Usually you will just click Use.

**Attach Saved Search**

Which searches would you like to attach to this contact?

Ryan Area 3
Ryan Means Area 2
Wednesday 25th

**1**

**2**

Create New Quick Search...

Cancel

Attach Search(es)

**3**

Help   RM as RM

Searches

Description

*Solid Earth Style (Semonin REALTORS)
*Solid Earth Style (Semonin REALTORS)
1 - Residential (Louisville MLS)
2 - Multi Family (Louisville MLS)
3 - Land/Lots (Louisville MLS)
4 - Rental (Louisville MLS)
5 - Multi-Property (Louisville MLS)
Public Property Search (Louisville MLS)
Report Generation (Louisville MLS)

*Solid Earth Style
Residential
   Status
   Property Sub Type
   Area
   Listing Price
   Total # Bedrooms
   Total Baths
   SqFt -Total Finished
   Above Grade Finished
   Status Change Date
   Street
[more fields]

Use

Information is deemed to be reliable, but is not guaranteed. © 2014 N

Enter whatever Criteria you need for your clients' saved search. Remember, your clients' portal will only contain Saved Searches and Listing Carts. If you want your clients to have a lot of listings to look through, make the parameters fairly generic, if you want your clients to only see a few listings at a time, make your parameters more specific.

Once you have the parameters set, and are ready to save this search for your client, simply click the Save Button.

**4**



◄ Return to Contact Management

*Solid Earth Style* *work on behalf of a contact*

Draft last saved: 3/4/2014 9:07:12 AM

💾 Save    📧 E-Mail    🖨 Print    CMA    Export    ⚠ Report Violation

Edit Search | List | Detail | Photos | Map | Compare | Messages

View Results: 65

Quick Search▾ | Map Search

05-Auburndale/airdale/iroquois/TK/Shively
06-Buchel/Hghvw/okolona/FernCreek
07-FernCreek/Hikes Point/Jeffersontown
08-DglasHls/Hurstbrn/Mdltwn/Anchrg/StMatt
09-Anchrg/Glnvw/Lyndn/Prospct
10-Nelson County

See All...

☑ **Listing Price** between 100,000 and 200,000    X
100 000 to 200 000

☑ **Total # Bedrooms** of 2+    X
2 to max

☑ **Total Baths** of 2+    X
2 to max

☐ SqFt -Total Finished    X
☐ Above Grade Finished    X
☐ Status Change Date    X
☐ Street    X

View Results: 65    Clear

**65**

**listings matched your search**

View results in a list
Show listing details
See photos, videos, and virtual tours
Map the listings
Compare listings
Send Messages about listings
Save, E-mail or Print your listings
Create a CMA or Export

**Save Search**

Save Type: ● New ○ Existing          ☐ Mark as Favorite
Search Name:

Search Description:

Contact: Ryan & Randi Means

Ryan & Randi Means (no portal)
Ryan Means

**This prospect does not have a portal account. You can create one below.**

Enabled:    ● ON ○ OFF
Username:
Password:
Confirm:                              generate password

Save and Add Auto E-Mail    Save    Cancel

**(5)** Once you click Save a pop-up window will open with our Saved Search Options. Since we started the search from our Contact Management window the search will automatically select your clients' name, and will ask you to create a portal account by giving your client a username and password. Begin by giving the search a name, and if desired a description. Your client WILL be able to read this name and description.

Once you have named the search you will want to create your clients' portal account. Give them a Username and Password. We recommend the Username be their name, and the Password be either your 10-digit phone number, or your first name, whichever you prefer. Your client will be able to change their password. Now click Create to open their portal. Once done, either click Save or Save and Add Auto-Email, depending on you or your clients' personal preference.

**(6)** Save Search

Contact: Ryan & Randi Means

Ryan & Randi Means (no portal)
Ryan Means

**This prospect does not have a portal account. You can create one below.**

Enabled:    ● ON ○ OFF
Username: ryanmeans
Password: ••••
Confirm:  ••••                        generate password
Create

Create prospect account ation to this user with their username and password.

**(7)** Search Options

Save and Add Auto E-Mail    Save    Cancel

Once you save the search, you will be returned to the Edit Search page. If you needed to create an additional saved search for this contact you could clear the parameters and start again. If not, you can return to contact management to ensure the Saved Search shows up, as well as the Auto-Email Event if you added one. You should also check that your clients' Portal account is indeed turned on.

**8**

Sometimes when you return to contact management using the Return to Contact Management button above the search parameters it doesn't fully update. You may notice my contacts' Saved Search is showing, but their portal still says off. If your contact doesn't seem to have updated, simply click Contacts/Contact Management to reload the page. Once reloaded, select your contact and you should see the updated information.

flexmls | Quick Launch | Help ▾ | RM *as* RM ▾

Dashboard | Search | Daily Functions | Contacts | Taxes | Statistics | Preferences | Other | Spark

## 🖼 Contact Management
➕ Add Contact 🖨 Print 🗗 Advanced

**Quick Add: First Name:** [ ] **Last Name:** [ ] **E-mail:** [ ] ☐ Portal ➕ Add

**Search:** 🔍 [ ]                    **Group:** All Contacts ▾

| Name | Portal | Phone | E-mail |
|---|---|---|---|
| Ryan & Randi Means | OFF | | ryanmeans@semonin.com |
| Ryan Means | ON | | ryanmeans@semonin.com |

👤 Ryan & Randi Means | 🗗 Searches/Auto E-mail | 🖼 Portal | 🗒 Messages | 🗒 Notes | 🗒 Listing Notes | 🔗 Links

**Searches**
Ryan Area 2/3/8

➕ Add  🗗 Rename  🗗 Edit  ❌ Remove

**View**

**Listing Activity Report**

**Results**                    🔍 View Totals

View all                    -
View new in the last 24 hours                    -
View new since 02/04/2014 08:09 AM                    -
Reset time and view new since 02/04/2014 08:09 AM

**Auto E-mail**                    ➕ Add an Auto E-mail

**Search Parameters**
Property type Residential; Area of '02-Buchertwn/HghInds/Germantwn', '03-Clifton/Crescent Hill/St Matthews', '08-Dglas-Hls/Hurstbrn/Mdltwn/Anchrg/StMatt'; Listing Price between 100000 and 200000; Property Sub Type of ' Single Family Residential'; Status of 'Active'; Total # Bedrooms between 2 and 99; Total Baths between 2 and 9999.; New results include new listings, price changes, and status changes.

Once your client has a portal you will be able to see additional details about that portal, like which listing carts are included, and how many listings are in each. You will also see Listing Activity, which shows how many times your contacts have viewed specific listings. Finally you can change your clients' password, username, and even customize portal options per client. To do so, click change Settings.

**9**

Click View Portal to see what your client will see, this is a great way to get used to portals to explain them to your client!

**10**

| Name | | E-mail |
|---|---|---|
| Ryan & Randi Means | | ryanmeans@semonin.com |
| Ryan Means | | ryanmeans@semonin.com |

Ryan & Randi Means | Searches/Auto E-mail | Portal | Messages | Notes | Listing Notes | Links

**Client Portal:** ● ON ○ OFF    📷 View Portal    📧 E-mail Portal Link
Your portal url:  http://my.flexmls.com/ryanmeans

**Portal Listing Carts**

| | |
|---|---|
| 🛒 Recommended | 0 X |
| 🛒 Favorites | 4 X |
| 🛒 Possibilities | 3 X |
| 🛒 Rejects | 3 X |
| 🛒 Removed | 0 X |

**Listings Viewed By Ryan & Randi Means** (view all...)

| MLS # | Address | Views |
|---|---|---|
| 1381425 | 912 Rosemary Dr | 7 |
| 1382741 | 416 Virginia Ave | 4 |
| 1382763 | 521 Church Ln | 3 |
| 1372286 | 1489 Bland St | 3 |
| 1382545 | 4636 Beaver Rd | 1 |

**Portal Activity**
Last Login                                                        03/04/2014 at 09:12 AM

☑ Send a message to me when Ryan & Randi Means logs into the portal

**Portal Account**
    Username: ryanmeans              change username
    Password: *****                  change password

**Change Settings...**

The first time your client logs into the Portal Account FlexMLS will ask them if they'd like to watch a 3-minute tutorial video, or if they'd like to see the PDF Guide. The video is short, but informative, and you should recommend that your clients watch it.

Inside the portal the first and most noticeable thing should be your personal branding on the left. If you do not see yourself here, you need to go check your Portal Preferences. Your client should see a Saved Search(**1**) their default Listing Carts(**2**) and if you have sent any "reports"(**3**) those would show too. All three of these are topics you may need to be able to discuss with your contacts should they have any questions.



Customer Portal for Ryan Means

Contact | Help | Log Off

Prepared for you by
Ryan Means
IT Trainer

Semonin REALTORS
600 N. Hurstbourne Pkwy #20
Louisville, KY 40222

P:502-718-7126
C:502-718-7126
F:

ryanmeans@semonin.co

**Searches and Reports** (1)

Provided Searches
Ryan Area 2/3/8                                          4 New or Changed

Reports (3)
No reports are available

**Carts** (2)

| | |
|---|---|
| Recommended | 0 Listings |
| Favorites | 3 Changed in 4 Listings X |
| Possibilities | 1 Changed in 3 Listings X |
| Rejects | 1 Changed in 3 Listings X |
| Removed | 0 Listings |

**Messages**                                    Notification Options

Write a message to Ryan Means

There are no messages

**Profile**

Contact Information
Ryan  Means

ryanmeans@semonin.com
Change My Password

Powered by flexmls ®

**1** Saved Searches are probably the most obvious of the three items your contacts will have portal access to. To explain these inform your client that the Saved Search will display any listings that currently match ALL the parameters you set for that search. Make sure they understand that seeing a listing today does not mean they will see it tomorrow or next week. Listings fluctuate in and out of saved searches depending on criteria entered.

**2** Listing Carts are a new concept in Real Estate. A listing cart is a permanent or semi-permanent storage location for specific listings. These could be used for saving listings you have shown a client, or saving specific listings that are in direct competition with your sellers' listing. What your client needs to know is the listings contained within will always be there, unless you or your client deletes the listing from the cart. If the status or price of the listing change the listing will remain in the cart but it will show the new price or status.

**3** Reports can be of various types. First, you may send your Seller a CMA or a Presentation containing a CMA and closing cost estimate, both of which will show up as a Report in your clients' portal. If you manually send a listing or listings through the FlexMLS system, these emails will also show up as a report. Finally, any auto-emails will show up as a report in the client portal. The Subject Line of the Email is what will show in the client portal, so be sure the subject lines you use are specific enough for your client to identify what they are viewing. For CMAs, please be sure to use CMA as the subject.

The Preferences you chose in the Portal Preferences menu will determine how your clients' portal will look.

From Branding on the Left, to the Start Position of a Search. If you leave Start Position as default, the system will load the list view when your client first clicks on a Saved Search to view listings.

Some clients may prefer to start on the Map, or Photos views. Personally I am a big fan of starting with the Map View. From here your client can click on any Tab to get different views, just like you do in FlexMLS.

As you can see, portals are just a miniaturized FlexMLS system.

In any view your client will see a Blue Button on the selected listing that says Actions. Clicking on Actions will give your client additional actions for that listing, like Contact their agent (You), Schedule a Showing (Recommend a date/time to you), Print the selected listing(s), message their agent about a listing (same as before), or take some private listing notes (listing notes your client writes are shared with you). Above the listings they can also Save listings to a new or existing Listing Cart by clicking the Disc Icon.

## Your Client Can:

Easily Email You

Save Listings in a Listing Cart

Print Listings with the same options you get
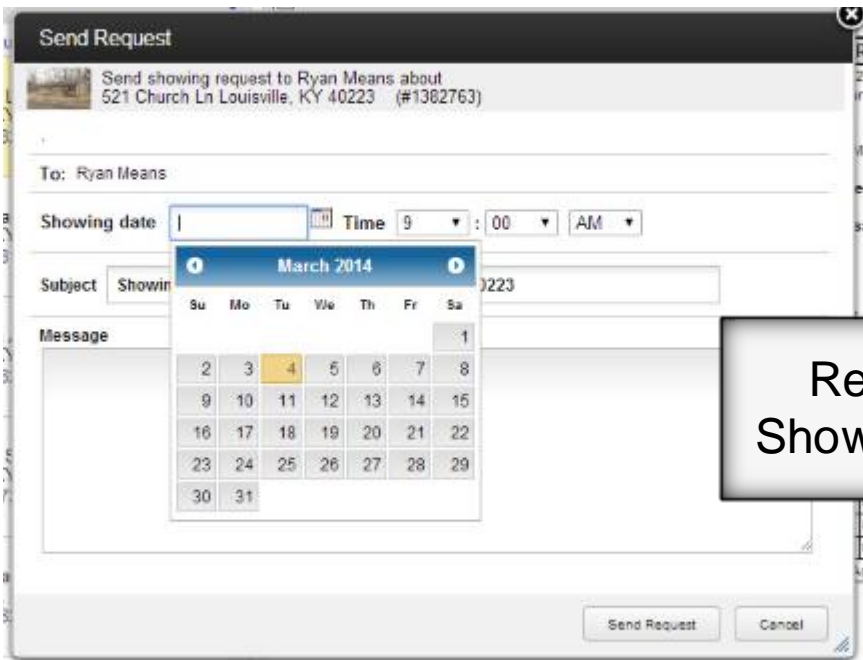
Recommend a Showing Date/Time

Just like we can, our clients can recommend a listing be moved, which is great for Sellers, they can locate their own listing to ensure it is accurately GeoTagged.

ShowingTime is a Showing request and Feedback system purchased by GLAR for use by all GLAR members. In order to access your ShowingTime account you will need to login to FlexMLS.com and click Preferences/My Profile. Then at the bottom of the My profile page you will see ShowingTime Settings.

Statistics | Preferences | Other | Spark

## My Profile
Louisville MLS
Ryan Means
Personal ID: 20140225230002568186000000
NRDS ID: 430016422

**Quick Profile Maintenance**

**Choose what part of your profile you wish to edit:**

My Names

My Documents

My Phone Numbers

My E-Mail Addresses

My Web Addresses

Personal Photo and Logo Maintenance

Security

Before using ShowingTime we need to review our settings, first we Click ShowingTime Settings under My Profile in the Preferences Tab.

**1**

ShowingTime Settings

ShowingTime has three major setup steps. The first will be to Edit your Profile. Click Edit Profile or My Agent Setup to begin.

**2**

## Semonin REALTORS
A Berkshire Hathaway Affiliate

- Home
  - Home
- Showings
- Listing Setup
- My Agent Setup
- Feedback
- Reports

**My Profile**

Ryan Means
(502) 718-2126 (Mobile Phone)
ryanmeans@semonin.com

**Edit Profile** ✏

**Showings I Have Requested**

| Scheduled For | Not Yet Confirmed | Confirmed |
|---|---|---|
| Today | 0 | 0 |
| Tomorrow | 0 | 0 |
| Beyond | 0 | 0 |

📧 **Schedule a Showing**

**Showings Requested on My Listings**

| Scheduled For | Not Yet Confirmed | Confirmed |
|---|---|---|
| Today | 0 | 0 |
| Tomorrow | 0 | 0 |
| Beyond | 0 | 0 |

**Feedback Requests**

0 appointments requesting your feedback
0 new feedback responses available for review
0 new feedback responses available to homeowner
0 feedback requests unanswered by the showing agent

As you may notice, ShowingTime does not automatically have your Cell nor Direct Line phone numbers. This means your showing requests may have been going to the Service Desk.

**1** First we need to add our phone numbers, confirm our email account, and if you want, add a text message phone number.

**2** Next you need to decide how you want ShowingTime to contact you for a Showing Request, Confirmed Showing, and for Appointments you request.

You will be contacted by EACH method you select at the same time for each request you receive.

**1b** If you want to add a text message phone number, simply type your cell phone number, then select your Carrier.

**To TURN OFF ShowingTime click No to Requesting Appts Online.**



Ryan Means (20140225230002568186000000)

Profile Basics

Upload Photo

First Name: Ryan
Last Name: Means
-- Phone Type --
-- Phone Type --
-- Phone Type --
Fax:
Email: ryanmeans@semonin.com
Text Message:   Select Carrier

MLS: Greater Louisville Association of Realtors
MLS Agent ID: 20140225230002568186000000
Office Name: Semonin REALTORS
MLS Office ID: 20131203192910035849000000
Office Phone: (502) 420-5000
Office Fax: (502) 426-1405
Date Joined:
Showing PIN:

Calendar Sync

Mass Add Listing Note

Listing Agent Preferences

Allow Agents To Request Appointments Online?: Yes   No
Default Appointment Mode:  Appointment Required

Email   Text Message   ShowingVoice

Notifications for Appointments on my Listings
When appointments are requested: ✔
When appointments are confirmed or cancelled: ✔

Feedback Requests
Send feedback requests to agents who showed my listings: Yes   No

Showing Agent Preferences

Email   Text Message   Call

Notifications for Appointments I Request

**3** Next you will add your Lockbox Access methods. You can also use the ShowingTime Mobile App if you wanted, use the Send Authentication Link to get a download button and authenticate button sent to your Email.

**Lockbox Access**

I can access SentriLock:  ○ Yes  ● No
I can access Supra/iBox:  ○ Yes  ● No
I have access to a HUD key:  ○ Yes  ● No

**Mobile App Access**

ShowingTime has mobile applications available for agents to download to their smartphones and/or tablets. Click the send button to email yourself instructions on how to log in along with direct links to install the mobile application. Be sure to open the email from the mobile device you wish to install the app on. Learn more.

ryanmeans@semonin.com    [ Send Authentication Link ]

**Appointment Download Service Key**

Download service key: [                    ]

**System Information**

Last Modified On:  2/28/2014 9:20 AM          Last Modified By:  Ryan Means

**4** If you want to use the App, download it, then send a NEW Authentication Link, access that email on the device with the App, then tap Authenticate in the email. From this point forward the App should be able to access your ShowingTime account.

**Semonin**
REALTORS®
A Berkshire Hathaway Affiliate

▸ Home

▸ Showings

▸ Listing Setup

▸ My Agent Setup

▾ Feedback

On My Listings

For Listings I Showed

Form Design & Settings

▸ Reports

Now you need to work on your Feedback Request Form. Under the feedback menu you will see Form Design & Settings. Click here to begin.

**(1)**

Be sure to click save when done!

**(4)**

First, determine the feedback schedule, then work on the feedback questions themselves.

**(2)**

ShowingTime sets up 5 default questions for you, but you can edit the original 5, or add your own. Questions can either be Multiple Choice or Open Text. For Multiple Choice you need to add the answers as well.

**(3)**

Preview → Save    Revert to Default

Current template: My Agent Template ▾

Feedback Email Text

Thank you for your recent showing of our listing. We would appreciate it if you could offer us some quick feedback on your showing experience. Please click on the link below to answer a few quick questions. Thank you very much!

Feeback Email Schedule

Number of times to resend feedback requests: 3 ▾    Number of days between resends: 1 ▾

Feedback Settings

○ Feedback Sent By/Reply to Office Email Address
◉ Feedback Sent By/Reply to Agent Email Address

When new feedback is received: Hold for Review ▾

Photos

☑ Display Agent Photo?    Agent photo:
☑ Display Listing Photo?    **Add Agent Photo**

Feedback Form - Instructions Box to be Viewed by the Showing Agent

We would appreciate you and your customers opinions. Please select from the choices below and fill in any additional comments you may have. Thank you very much for your assistance!

| Questions | Answers |
|---|---|
| Remove    Is the customer interested in the property? | Very<br>Somewhat<br>Maybe<br>Not at all |
| Remove    Please rate your overall experience at this showing | Excellent |

**1** Once you have your feedback settings, you need to ensure your listings are setup how you want them to be. First, click Listing Setup.



**2** Next select the Listing you wish to check the settings for by clicking the Listing Number.

If you don't have any listings you won't have to worry about this until you do. Once you get a listing please come in to that listing and update your seller info, and add any Access Info or Showing Instructions you may need.

**Once you have selected a listing you will get Instructions for that listing. First, select the Appointment Type and Overlapping Appointment options you want to use.**

**1**

**01 Amy Ave, Crestwood (1377479)**

lect another Listing to Manage: 1201 Amy Ave. Crestwood (1377479) ▾

**Please be sure to click Save when you are finished!**

**4**

**4**

**The instructions for this listing are not complete.**

We've gone ahead and filled in your notification preferences; please verify these are correct for this listing, make any other changes to the listing, and click 'Save' to complete your instructions.

**Save Changes** **Undo Changes**

1201 Amy Ave
Crestwood, KY 40014
1377479
ACTIVE
$175,000

**Presented By:**
Randi Means

**Archive**

**Listing Activity Report**

**Listing Changes Log**

**Appointment Basics**

Allow Showing Agents to Request Appts Online?  ● Yes ○ No

Appointment Type:  Appointment Required ▾

Allow Overlapping Appointments?  Yes, No need to inform the showing agents ▾

**Contacts**

| Order | Contact Details | Can Confirm Appts By: | | | Notify of Confirmed/Cancelled Appts By: | | |
|---|---|---|---|---|---|---|---|
| | | Text Message | Email | ShowingVoice | Text Message | Email | ShowingVoice |
| 1st | Randi Means (Listing Agent) (502) 558-6188 (Mobile Phone) RANDIMEANS@SEMONIN.COM 5025586188@vtext.com (Text Message) | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ |

**Next, if you want, add an Owner/Occupant info.**

**2**

ations will be copied to:

w will this work ? **Advanced Notifications**     **Add new Co-Listing Agent ✦**     **Add New Owner/Occupant ✦**

**Access Information**

**You will also want to add Access Info. Any access info you add is sent to Showing Agents once you confirm their appointment.**

**Access Details:**

Access Type:  Select One ▾

Lockbox Code/Notes: _____

**Alarm Details:**

Alarm Disarm Code: _____

Alarm Arm Code: _____

Alarm Passcode: _____

Alarm Notes: _____

**3** **Step 3 on next page.**

...or this listing are not complete.

...filled in your notification preferences; please verify these are correct for this ...changes to the listing, and click 'Save' to complete your instructions.

**Save Changes**    **Undo Changes**

Please be sure to click Save when you are finished!

**4**

**Alarm Details:**

Select One ▼

Alarm Disarm Code:

Alarm Arm Code:

Alarm Passcode:

Alarm Notes:

1201 Amy Ave
Crestwood, KY 40014
1377479
ACTIVE
$175,000

Presented By:
Randi Means

**Archive**

**Listing Activity Report**

**Listing Changes Log**

**Showing Restrictions**

Required Lead Time:    0 hours ▼         Maximum Appointment Length    2 hrs ▼
Suggested Lead Time:   1 hour ▼          (Excludes Inspections & Appraisals):

No Showings During:    **Add New Showing Restrictions +**

**Additional Instructions**

**3**

Add additional Showing Instructions Here!

Type your Showing Instructions here (Required for View Instructions Only Listings):    **Add From Predefined Notes +**

**Driving Directions**

Directions:

I-71 Exit 22, RIGHT on Hwy 53, 1.5 miles, RIGHT West Moody (Hwy 2856), RIGHT approx. 1 mile on Cal Avenue. Right on Amy Avenue.

## Appointment Type and Overlapping Appointments

equest Appts Online? ● Yes ○ No

Appointment Type:

**Appointment Required** ▼

**Appointment Required**
Permission must be obtained from ANY of the designated listing contacts (Owner(s)/ Occupant(s)/ Listing Agent(s)) before the appointment request can be confirmed. Typically used for occupied homes.

**Courtesy Call or Go and Show**
Appointment requests are documented and immediately confirmed. Typically used for vacant homes on lockbox.

**View Instructions Only**
The showing agent will immediately see any notes provided by the listing agent. The showing agent will not be given a calendar to select an appointment date & time.

You may want to use Courtesy Call or Go and Show options for Vacant Listings so you do not have to personally Approve Showings for Vacant properties.

On Land/Lots you may want to use the View Instructions Only, just to notify the Showing Agent of any Notes you've attached to the listing.

Overlapping appointments can help drive prices up, as well as immediately informing the potential buyers that there may be a multiple offer situation, but some buyers and buyers' agents take offense at seeing another agent/buyer during a showing.

g Agents to Request Appts Online? ● Yes ○ No

Appointment Type:   **Appointment Required** ▼

Allow Overlapping Appointments?   **Yes, No need to inform the showing agents** ▼

**Yes, No need to inform the showing agents**

**Yes, Please tell the showing agent ahead of time**

**No, exclusive showings only**

## Scheduling a Showing with ShowingTime

Whether using ShowingTime to schedule single appointments at a time, or creating a ShowingCart, to begin, find the listing you wish to request a showing on, then click the ShowingTime Button, which looks sort of like a Blue Clock. This will open a new window.

**1**

When scheduling a Showing through ShowingTime you first select your preferred contact method.

**1**
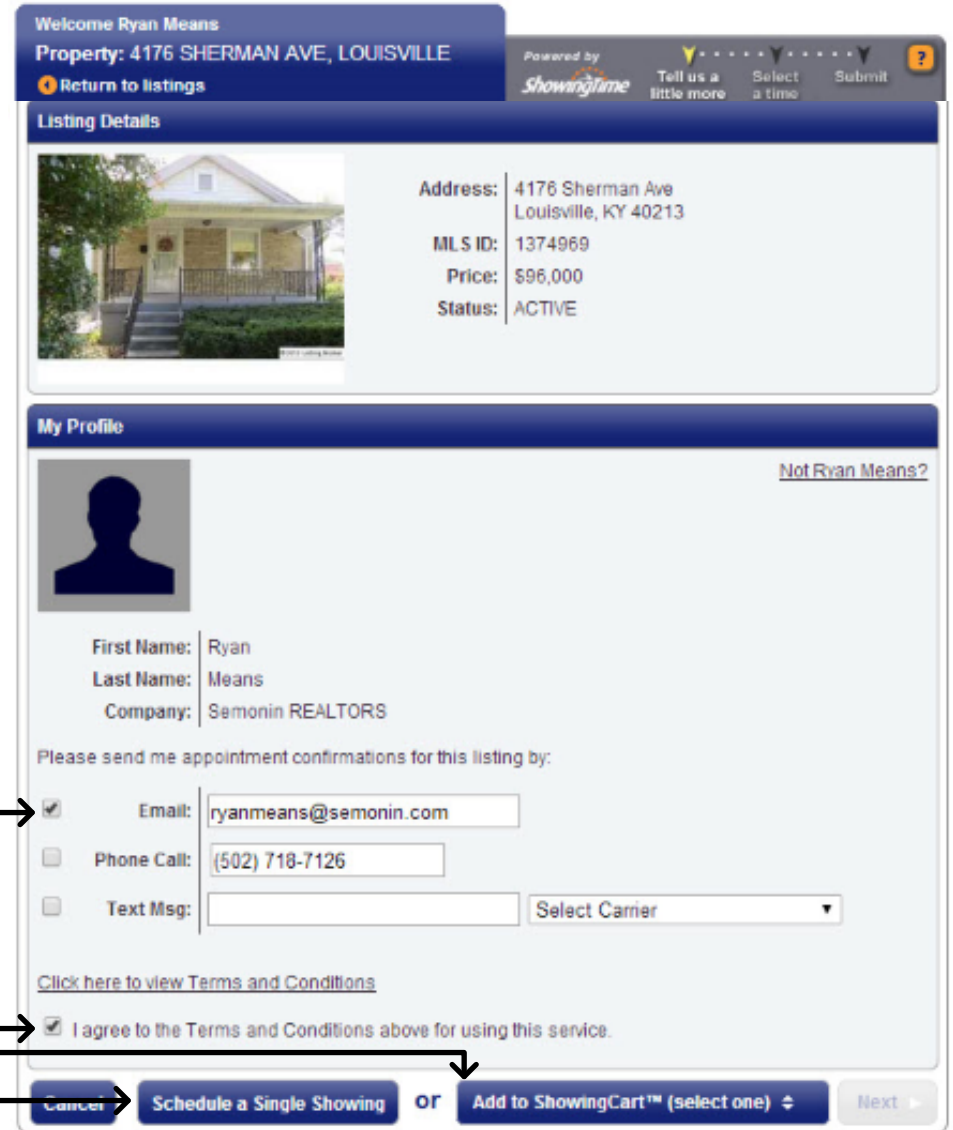
Next, Click Agree.

**2**

Finally decide if you want to Schedule a Single Showing, or Add this listing to a ShowingCart.

**3**

**A ShowingCart is a series of Showings. By scheduling a ShowingCart you can pick the preferred order of the showings with the help of a map, then begin picking times. You can set all times at once, and send all requests at once, or schedule a few and request them, waiting to set the rest until your first showings are confirmed.**

Welcome Ryan Means
Property: 4176 SHERMAN AVE, LOUISVILLE
Return to listings

Powered by
ShowingTime

Tell us a little more | Select a time | Submit

**Listing Details**

Address: 4176 Sherman Ave Louisville, KY 40213
MLS ID: 1374969
Price: $96,000
Status: ACTIVE

**My Profile**

Not Ryan Means?

First Name: Ryan
Last Name: Means
Company: Semonin REALTORS

Please send me appointment confirmations for this listing by:

☑ Email: ryanmeans@semonin.com
☐ Phone Call: (502) 718-7126
☐ Text Msg: [                    ] Select Carrier ▼

Click here to view Terms and Conditions

☑ I agree to the Terms and Conditions above for using this service.

Cancel | **Schedule a Single Showing** or **Add to ShowingCart™ (select one) ⇕** | Next

© 2014 ShowingTime

When you select add to a ShowingCart, you will be given the option of adding it to an upcoming tour, or Creating a New ShowingCart. To create a new ShowingCart, simply pick a date and give the cart a name.

Now that you have created a ShowingCart, you can return to FlexMLS, select another listing, and click the ShowingTime "Clock" on the details page. Once you return to the ShowingTime showing request page you can just click Add to ShowingCart, select your cart, and click next to add it. Repeat this for each listing you want to add.

**4**

**5**

**6**

**7**

**New Tour**

1) Choose a date for your tour:

| | March 2014 | | | | | |
|---|---|---|---|---|---|---|
| Su | Mo | Tu | We | Th | Fr | Sa |
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | | | | | |

2) Give your tour a name:

(e.g. *Afternoon with John and Jane Smith*)

Ryan Means 3/1/14|

**Ok**

**Add to ShowingCart™ (select one)**

Create a New ShowingCart™

Upcoming Tours:

Add to Tour on 3/1/2014
Cancelled Date

Add to Tour on 3/1/2014
Ryan 3/1

Add to ShowingCart™ (select one) ⇕

**Add to ShowingCart™ (select one)**

Create a New ShowingCart™

Upcoming Tours:

Add to Tour on 3/1/2014
Ryan 3/1

Add to Tour on 3/1/2014
Cancelled Date

Add to Tour on 3/1/2014
Ryan Means 3/1/14

Add to ShowingCart™ (select one) ⇕

**8**

Now that we have added all the listings to our ShowingCart we can organize them into the path we wish to drive. Looking at the map you can quickly distinguish which listing is which, and using the Up and Down arrows we can quickly re-organize them to the order we will take.

### ShowingCart™ Tour Information

Tour Date: 3/1/2014

Tour Name: Ryan Means 3/1/14

### Appointment Information

Print Tour Details

| | Address | Appt Type | Appt Status | Appt Time | Availability (EST) |
|---|---|---|---|---|---|
| A 4176 Sherman Ave Louisville, KY 40213 (1374862) | Courtesy Call | Not Yet Requested | Pick a Time | |
| B 4219 Sherman Ave Louisville, KY 40213 (1381127) | Appt Required | Not Yet Requested | Pick a Time | |
| C 1023 Ardmore Dr Louisville, KY 40217 (1379064) | Appt Required | Not Yet Requested | Pick a Time | |
| D 1343 S Sherby St Louisville, KY 40217 (1355694) | Appt Required | Not Yet Requested | Pick a Time | |

Add A Listing

View Turn-by-Turn Directions    Something is wrong with my map.

Return to Listings

© 2014 ShowingTime.

**Other Buttons**

Remove Showing

A 1343 S Sh Louisville, (1355694)

Move to another Tour

| | Address | Appt Type | Appt Status | Appt Time | Availability (EST) 5a 6a 7a 8a 9a 10a 11a 12p 1p |
|---|---|---|---|---|---|
| ↑ ↓ ⤢ 🗑 | (A) 4176 Sherman Ave Louisville, KY 40213 (1374969) | Courtesy Call | Not Yet Requested | 🕒 Pick a Time | |
| ↑ ↓ ⤢ 🗑 | (B) 4219 Sherman Ave Louisville, KY 40213 (1381127) | Appt Required | Not Yet Requested | 🕒 Pick a Time | |
| ↑ ↓ ⤢ 🗑 | (C) 1023 Ardmore Dr Louisville, KY 40217 (1379064) | Appt Required | Not Yet Requested | 🕒 Pick a Time | |
| ↑ ↓ ⤢ 🗑 | (D) 1343 S Shelby St Louisville, KY 40217 (1355684) | Appt Required | Not Yet Requested | 🕒 Pick a Time | |

**Add A Listing**

**9**

Now, on each listing, click Pick a Time to open the appointment scheduler. Pick the type of Showing, then the start and end time. Repeat this for each listing in the cart.

**10**

**11**

**12**

**Verify your appointment details** ✕

Type of Showing: 1st Showing ▼

Appt Start Time: 12:00 PM 🕒

Appt End Time: 12:15 PM 🕒

Notes for the Listing Agent:

**Select Time**

Early Morning
5:00 AM 5:15 AM 5:30 AM 5:45 AM
6:00 AM 6:15 AM 6:30 AM 6:45 AM
7:00 AM 7:15 AM 7:30 AM 7:45 AM

Morning
8:00 AM 8:15 AM 8:30 AM 8:45 AM
9:00 AM 9:15 AM 9:30 AM 9:45 AM
10:00 AM 10:15 AM 10:30 AM 10:45 AM
11:00 AM 11:15 AM 11:30 AM 11:45 AM

Afternoon
12:00 PM 12:15 PM 12:30 PM 12:45 PM
1:00 PM 1:15 PM 1:30 PM 1:45 PM
2:00 PM 2:15 PM 2:30 PM 2:45 PM
3:00 PM 3:15 PM 3:30 PM 3:45 PM
4:00 PM 4:15 PM 4:30 PM 4:45 PM

Evening
5:00 PM 5:15 PM 5:30 PM 5:45 PM
6:00 PM 6:15 PM 6:30 PM 6:45 PM
7:00 PM 7:15 PM 7:30 PM 7:45 PM
8:00 PM 8:15 PM 8:30 PM 8:45 PM

Late Evening
9:00 PM 9:15 PM 9:30 PM 9:45 PM
10:00 PM 10:15 PM 10:30 PM 10:45 PM
11:00 PM 11:15 PM 11:30 PM 11:45 PM

As you add an appointment time to each listing you will see a Blue rectangle on the Availability schedule next to that listing. Keep adding appointments until each listing has a scheduled time, or just add a few then send the requests and wait to schedule the rest until you have received confirmations, in case you need to adjust the schedule.

**ShowingCart™ Tour Information**

Tour Date: 3/1/2014

Tour Name: Ryan Means 3/1/14

**(13)**

**Appointment Information**

**Print Tour Details**

| | Address | Appt Type | Appt Status | Appt Time | Availability (EST) 12p 1p 2p 3p 4p 5p 6p 7p 8p |
|---|---|---|---|---|---|
| ↑ ↓ ⤢ 🗑 | (A) 1343 S Shelby St Louisville, KY 40217 (1355684) | Appt Required | Not Yet Requested | 🕐 12:00 PM - 12:45 PM | ▮ |
| ↑ ↓ ⤢ 🗑 | (B) 1023 Ardmore Dr Louisville, KY 40217 (1379064) | Appt Required | Not Yet Requested | 🕐 1:00 PM - 1:45 PM | ▮ |
| ↑ ↓ ⤢ 🗑 | (C) 4219 Sherman Ave Louisville, KY 40213 (1381127) | Appt Required | Not Yet Requested | 🕐 2:00 PM - 2:45 PM | ▮ |
| ↑ ↓ ⤢ 🗑 | (D) 4176 Sherman Ave Louisville, KY 40213 (1374969) | Courtesy Call | Not Yet Requested | 🕐 3:00 PM - 3:45 PM | ▮ |

**Add A Listing**

**Hide Tour Map**

**(14)**

**Return to Listings** **Send Requests**

Once you have set the times for each listing you wish to request, simply click Send Requests to finish the process. You will be sending every listing's request at the same time.

# Comparable Market Analysis (CMA)

Creating a CMA in FlexMLS Web is a quick and easy process. You may begin from any search screen, or by selecting **Create CMA** under the Search menu.

# TYPES OF CMA

**Full CMA – (The old Manual Comparison Report)**

A Full CMA includes options for a cover page, subject property information, comparable properties, value adjustments, a summary and a recommendation.

**Quick CMA – (The old CMA - 3Up Report)**

The Quick CMA bypasses the cover page, subject information, and value adjustments to provide quick access to a side-by-side comparison of listings, a price analysis summary, and statistics.

**Statistical CMA**

The Statistical CMA provides a table of information broken down by listing status, with the option to include individual listing information in the form of the short display or View used in the search results screen. You may also choose how to group the individual listings, whether to include totals, and whether to remove square foot statistics.

# CREATE A CMA

To start a new CMA in flexmls Web, you may click on the **CMA** option under Search on the menu. The Create CMA screen allows you to choose a CMA you have previously saved or proceed step by step to create a new CMA, including a search for comparables. You may also begin your CMA by starting with a search.

## Start with a Search

From any search results page, you may begin a CMA by selecting comparable properties and clicking the CMA button at the top of the page. By beginning with a search, you may choose listings based on sold date, price, geographical location, or any search criteria. This flexibility allows you to custom build your CMA to your exact specifications.



Select the type of CMA you would like to create; Full, Quick, or Statistical; by clicking on the radio button next to the description. After you have made your selections, click **Next to proceed.**

**CMA Menu**

Use All Results

Use Selected

**One-Line CMA**

One-Line CMA  /  PDF

FlexMLS also has a One-Line CMA style report. It is the fastest and easiest CMA method but it also doesn't include a Subject Property. It is just a quick comparison of the selected listings. This is a great CMA type to use for Buyers considering making an offer.
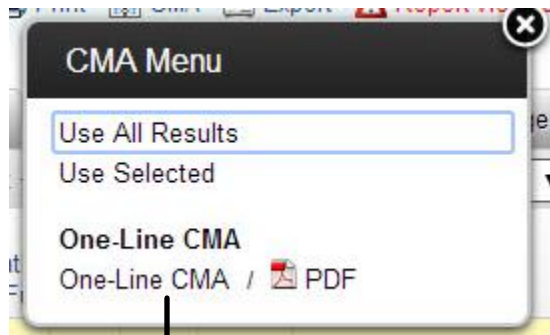
## Residential CMA

Listings as of 03/21/14 at 3:44 PM

Status of 'Active'. (Selected Listings Only)

**ACTIVE Properties**

| MLS # | Address | City | Tot AG Fin SqFt | Acres | Age | Date | $/SqFt | DOM/CDOM | OLP | LP |
|---|---|---|---|---|---|---|---|---|---|---|
| 1382925 | 323 W Broadway 903 | Louisville | 889 | 0 | 0 | 03/04/2014 | 221.60 | 17/178 | $197,000 | $197,000 |
| 1382926 | 323 W Broadway 1003 | Louisville | 889 | 0 | 0 | 03/04/2014 | 224.41 | 17/178 | $199,500 | $199,500 |
| 1376283 | 532 S 4th St 306 | Louisville | 925 | 0 | 3 | 11/13/2013 | 237.30 | 128/313 | $219,500 | $219,500 |

| **Listing Count 3** | Averages | Sqft: 901 | $/Sqft: 227.77 | DOM/CDOM: 54/223 | O-Price: 205,333 | L-Price: 205,333 |
|---|---|---|---|---|---|---|
| | Price | High: 219,500 | Low: 197,000 | Median: 199,500 | | |

| **Property Type Count** | 3 | Averages | Sqft: 901 | $/Sqft: 227.77 | DOM/CDOM: 54/223 | O-Price: 205,333 | L-Price: 205,333 |
|---|---|---|---|---|---|---|---|

* Price statistics for closed listings based on sold price. All other statuses and Totals based on current list price.

Information is deemed to be reliable, but is not guaranteed. © 2014 MLS and FBS. Prepared by Ryan Means, IT Trainer on Friday, March 21, 2014 3:44 PM.

# Cover Page Tab

Enter the information you would like for your cover page. Click in the field of choice and use the tab key to move to the next field (shift + tab to move backward). You may edit the text in any field. The comments field can be used to provide an analysis of your proposal or to describe the subject property in more detail. When you are ready to proceed, click the **Next Step** button.

**3**

**Create CMA**                                                                          Step 2

| CMA Type | Cover Page | Subject | Comps | Adjustments | Summary | Recommendation | Finish |
|----------|------------|---------|-------|-------------|---------|----------------|--------|

**Cover Page Information**

Title: Comparable Market Analysis

For: Ryan Means

As of: ○ Friday, March 21, 2014        ○ Always Use Current Date

By: ○ Ryan Means of Semonin REALTORS
    ● Custom Profile Card Horizontal                                              ▼

Comments:
Spell Check

( 0 of 3000 character max )

<< Previous Step                                                    **4**        Next Step >>

# Subject Tab

Click in the field to enter address information for your subject property. It is important to enter the most complete address you can, including zip code, as this information will be used to plot the subject on a map with the comparable listings in the final report. Use the tab key to move to the next field, or simply click within the field where you wish to add information.

**5b**

Create CMA                                                    Ste

CMA Type | Cover Page | **Subject** | Comps | Adjustments | Summary | Recommendation | Fin

| Subject Property Address Information | Subject Photo |
|---|---|
| Address 1: | |
| Address 2: | No photo |
| City: | |
| State: Zip: | Upload photo |
| Auto-Populate Fields from existing Listing | Remove photo |

**Subject Property Additional Information**

Template: test ▼ Delete/Rename Template

Click **Upload Photo** to load a photo for your subject property. You may choose to use an existing MLS listing as your subject property. Click on the button below the address fields to **Auto-Populate Fields from an existing Listing**. Enter the MLS number of the subject property you wish to use in the field that is presented and click **OK.**
**You will see the photo, address and description fields populated with information for the MLS number entered.**

**5a**

| flexmls field name | | Field name i.e. Lot Acres | Description i.e. 3 acres | $/x | A |
|---|---|---|---|---|---|
| Total Bedrooms | 🔍 | Total Bedrooms | | ☐ | ✕ ↕ |
| Total Bathrooms | 🔍 | Total Bathrooms | | ☐ | ✕ ↕ |
| Total SqFt. | 🔍 | Total SqFt. | | ☐ | ✕ ↕ |
| Lot Size | 🔍 | Lot Size | | | ✕ ↕ |
| Lot Acres | 🔍 | Lot Acres | | ☐ | ✕ ↕ |
| Style | 🔍 | Style | | | ✕ ↕ |
| Garage Type | 🔍 | Garage Type | | | ✕ ↕ |
| [None - custom field] | 🔍 | Gas Fireplace Insert | | | ✕ ↕ |
| [None - custom field] | 🔍 | test item | | | ✕ ↕ |

New Item | Remove All Items | Save/Replace Template

<< Previous Step

**6**

Next Step >>

| Create CMA | | | | | | Step 3 |
|---|---|---|---|---|---|---|
| CMA Type | Cover Page | **Subject** | Comps | Adjustments | Summary | Recommendation | Finish |

**Subject Property Address Information**

**Subject Photo**

Address 1:

Address 2:

City:

State:          Zip:

No photo

Upload photo
Remove photo

Show Map Location    Auto-Populate Fields from existing Listing

**Enter the Listing Number of the Subject Property:**  ☒

Listing Number: 1374567

Submit   Cancel

Once on the Subject Tab, simply click Auto-Populate Fields from Existing Listing to quickly add your Subject Property's information. Once clicked a pop-up will load asking you for a Listing Number of the Subject property.

In the next section, enter the detailed description of the subject property. This is similar to entering a listing. The more key data fields you enter, the more complete your comparison will be. Some standard fields will already be selected for you (such as bedrooms, bathrooms and square feet) allowing you to fill in the appropriate values for your subject property. If you do not want one of these standard fields, click the red X next to it to remove it.

If you would like to add a "Price Per" statistic for selected fields on your CMA, click on the checkbox beneath the **$/x** column. For example, if you'd like to show the Price Per Total Bedrooms on the CMA, check the corresponding box.

To add new items, click on the **New Item** button at the bottom of the page. Next, click on the magnifying glass to select a database field for comparison. If you would like to add a comparison field that is not on the list, type in a description. After you have made your selections for subject property information, you may Save All as a Template for easy future access. You will be presented with a new window titled Save CMA Template. Enter a title for your new template, choose to overwrite an existing template, or set the template as the default from this screen. Click **Save Template** or **Cancel** to return to the subject property entry. Templates are available for selection, editing, or removal from the drop-down list above the field name selection list.

When finished, click on the **Next Step** button.
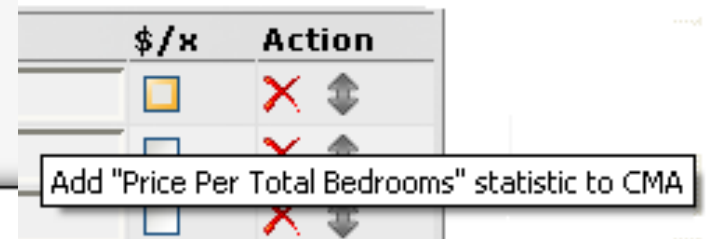
# Comps Tab

Click the Select box next to the MLS number of the properties to which you would like to make adjustments. **Please Note: Only those listings you check will be available for adjustments, and the unchecked will be included in the overall market analysis.** To view the details of any particular listing, click the MLS number link and a full listing report will display in a new window. Click the Select column header to select or deselect all listings. To bring in additional comparables, click on the **Add comparables** link.

**7**

Select the method you wish to use to find and select the comparable listings to your CMA.
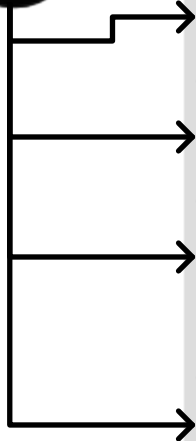
MLS Comparables | Non-MLS Comparables

🌐 **Mapping**      🔍 Find Comps
Click the Find Comps button to the right to begin your mapping search.

🔍 **Full Search**      🔍 Find Comps
Click the Find Comps button to the right to begin your full search.

🛒 **Listing Cart**      ➕ Add Comps
Select a listing cart you wish to retrieve comparables from.
Beardsley (7 listings) ▾

¹₂³ **MLS Number**      ➕ Add Comps
er MLS numbers separated by commas *(Example: 01-2151,00-5936)*

**\*This is only necessary if you have not already added the Comps you wish to use. You may also add non-MLS Comps and Tax Comps.\***

↩ Return to CMA

On the resulting screen, type the MLS number of a property or use one of several methods to search for additional comparables. Click the **Add Non-MLS Comparables** tab to add a property that is not available in the MLS. You will be presented with a new window. Click on **Create New Comparable** and enter your information in the fields provided. Fields highlighted in red are required for entry. You may choose to share the Non-MLS comparable with members of your office or company, so they may use the information in future CMAs. When you are finished with your entries, click **Save this Comparable**. Select your new comparable and click **Add this Comparable** to add it to your existing list. You may also edit or delete any Non-MLS comparable entered from this window. Remember to place a check in the select box for your Non-MLS comparable if you wish to make it available for adjustments.

You may remove any comparable by clicking on the red X in the column to the right of that property's address. When you are satisfied with your choices, click the **Next Step** button to proceed.

# Adjustments Tab

The fields you selected on the Subject tab are available as the first part of this Adjustment tab. If you forgot to enter an item on the Subject tab, you can select the **All Fields** radio button option to see all the available fields for adjustment.

**8**

**Create CMA**      Step 5

CMA Type | Cover Page | Subject | Comps | **Adjustments** | Summary | Recommendation | Finish

**Fields:** ○ Subject Fields ○ All

**Fields**     **Listing Data**

Address
City
State
Total Bedrooms
Total Bathrooms
Total SqFt.
Lot Size
Lot Acres
Style
Garage Type

| | |
|---|---|
| 2711 COBBLESTONE CT | 2711 COBBLESTONE CT |
| 2118 BROADWAY N | 2118 BROADWAY N |
| 2522 35 AVE S | 2522 35 AVE S |
| 14 BIRCH LANE | 14 BIRCH LANE |
| 1610 11 ST N | 1610 11 ST N |
| 37 | 37 PRAIRIEWOOD |

Auto-Adjust Comparables     Remove All Adjustments

**Comparable Adjustment Summary**

**Adjustments For Comparable** [2001 45TH ▼]

**Description**     **+/-**    **Value**    **Rm**    **$216,800**

There are no adjustments for comparable 06-743.

+ New Adjustment     Edit Adjustment List

**Comments**

<< Previous Step         Next Step >>

To make an adjustment, click on the field you want to adjust. For easy comparison, the value for your subject property will be presented to the right along with the appropriate values for that field for each of the comparable listings you selected. Next to each comparable listing, you can enter an adjustment amount. Include a + or - to adjust the price up or down. If you are comparing a sold property, you will be adjusting the sold price. Other statuses will use the list price. As you enter adjustments, they will be tallied for each listing in the bottom half of this tab. You may click on any highlighted address in the Comparable column to view a full listing report for that property.

To view all adjustments for a particular comparable, click on the drop-down **Adjustments for Comparable** to select a listing. In addition to making adjustments on comparable fields in the grid part of the tab, you can add saved adjustments. If you click on the magnifying glass next to the Description field, you can select from a list of standard adjustments you have saved. Use the **Edit Adjustment List** button to add to or modify your standard adjustments. Be sure to click **Save** to add your changes to the list. Click **Save and Return** to complete your changes and return to the Adjustments page.

To expedite the process of adjusting prices, set up auto adjustments based on values for your area. You determine the value per unit, and flexmls Web will save your values for future use. For example, if in your market one story in a residence is worth approximately $30,000, you may set that value in your auto adjustments, and then with one click adjust all property values in your CMA.



To set up adjustments, click the **Edit Adjustment List** button.

Click the **Add New** button to create a new Auto Adjustment, or click **Remove to remove an existing Auto Adjustment. You may also look at Manual Adjustments that you have used previously.**

When you click on the **Auto-Adjust Comparables** button, you will see a pop-up window with the following message: **Auto-Adjusting your comparables will add adjustments based on your rules and the differences between your subject property and the comparable. This process will only add adjustments and not modify any of your existing adjustments. Do you wish to proceed?** This means that if you click the button multiple times, your adjustment will be applied multiple times. Be sure to click the **Remove All Adjustments** button if you would like to reset all adjustments to zero before applying Auto Adjustments. When you are ready to proceed, click the **Next Step** button at the bottom of the screen.

| State | | | |
|---|---|---|---|
| Total Bedrooms | 1709 VALLEY VIEW | 1709 VALLEY VIEW | |
| Total Bathrooms | 1207 ZENTWOOD | 1207 ZENTWOOD | |
| Total SqFt. | 12 SKYLARK CIRCLE | 12 SKYLARK CIRCLE | |
| Lot Acres | 1522 AUDUBON | 1522 AUDUBON | |
| Style | | | |
| Garage Type | | | |
| Amenities: Pool | | | |

[ Auto-Adjust Comparables ]    [ Remove All Adjustments ]

**Comparable Adjustment Summary**

**Adjustments For Comparable** [ 1709 VALLEY VIEW ▾ ]

| Description | | +/- | Value | Rm | $154,000 |
|---|---|---|---|---|---|
| Total Bathrooms | 🔍 | - | 5000 | ✗ | $149,000 |
| Total SqFt. | 🔍 | + | 45000 | ✗ | $194,000 |

[ ✚ New Adjustment ]    [ Edit Adjustment List ]

**Comments**

You may also type any comments in here for each comparable.

[ << Previous Step ]                                          [ Next Step >> ]

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# Summary Tab

The Summary Tab presents several statistical tables to help you make your recommendation for the CMA. The first set of statistical tables presents each of the adjusted comparable listings and the total adjustments made for each.

### Price Analysis

#### Summary of Closed Listings

| List # | Address | List Price | Days on Market | Sold Date | Sold Price | Total Adjustments | Adjusted Price |
|---|---|---|---|---|---|---|---|
| 06-743 | 2001 45TH, Fargo | $225,000 | 37 | 08/04/2006 | $216,800 | - | $216,800 |
| 98-1237 | 3737 RIVER DR S, Fargo ND | $209,000 | 193 | 03/11/1999 | $200,000 | $-10,000 | $190,000 |
| 98-1002 | 2802 37 AVE S, Fargo ND | $242,500 | 228 | 02/26/1999 | $233,750 | - | $233,750 |
| 98-283 | 2624 35 AVE S, Fargo ND | $258,500 | 273 | 11/13/1998 | $240,000 | $-6,000 | $234,000 |
| 98-223 | HIGHLAND PARK, Fargo ND | $217,000 | 228 | 09/17/1998 | $213,500 | $7,000 | $220,500 |
| 96-1350 | 1610 11 ST N, Fargo ND | $248,000 | 141 | 02/25/1997 | $232,000 | $-25,000 | $207,000 |

The listings are grouped into separate tables by status (sold, active, pending, or expired). A table summarizing the low, high, average and median prices (after adjustments) is also included. Lastly, a complete market summary is given, which will include all listings in your search regardless of whether they were checked for adjustments. This allows you to present a broader market overview without having to include them in your adjustment reports. When you are ready to proceed, click the **Next Step button.**

#### Low, Average, Median, and High Comparisons

| | Closed | Overall |
|---|---|---|
| Low | $190,000 | $190,000 |
| Average | $217,008 | $217,008 |
| Median | $220,500 | $220,500 |
| High | $234,000 | $234,000 |

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#### Overall Market Analysis (Unadjusted)

| Status | # | List Vol. | Avg. List Price | Sold Vol. | Avg. Sold Price | Sale/List Price | Avg. Lot Acres | Avg. List $/Lot Acres | Avg. Sold $/Lot Acres | Avg. DOM |
|---|---|---|---|---|---|---|---|---|---|---|
| Closed | 7 | 1,649,900 | 235,700 | 1,581,050 | 225,864 | 0.96 | 0 | 374,705.23 | 364,804.96 | 229 |
| Overall | 7 | 1,649,900 | 235,700 | 1,581,050 | 225,864 | 0.96 | 0 | 374,705.23 | 364,804.96 | 229 |

# Recommendation Tab

The Recommendation Tab carries over the high, low and average adjusted prices from the Summary tab. You can edit any of these fields by clicking your mouse in the field and typing in new values. Click the **Next Step** button when you have entered your recommendation.

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Create CMA — Step 7

CMA Type | Cover Page | Subject | Comps | Adjustments | Summary | **Recommendation** | Finish

**Subject Property Listing Price Recommendation**

Low: $ 210000
High: $ 269000
Recommended: $ 232342

**Listing Price Recommendation Options**
- ◉ Calculate High/Low Price using High/Low Price from comparables
- ○ Calculate High/Low Price using a percentage above/below the Recommended Price

[ Recalculate ]

<< Previous Step          Next Step >>

Create CMA — Step 8

CMA Type | Cover Page | Subject | Comps | Adjustments | Summary | Recommendation | **Finish**

**Comparable Market Analysis Display Options**
- ☑ Cover page
- ☑ Map of subject and comparable properties
- ☑ Subject property description
- ☑ Side-by-side comparison of all listings
- ☐ Sort side-by-side comparison by Status
- ☑ Search parameters
- ☑ Statistical summary

CMA Color Scheme:
Default White

**Listing Detail Options**
- ☑ Individual adjustment summary for each listing
- ☑ Individual Price Per calculation summary for each listing
- ☑ Include listing detail using this report:
  Full Report
- ◉ Print all listings
- ○ Print only listings marked as comparable

E-mail | Save | View | Print

# Finish Tab

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On the Finish Tab, you can choose what parts of the CMA you want to include on the report and then E-mail, Save, View, or Print the report.

Place a check mark next to each item you want to include on the report. The side-by-side comparison is a traditional 3-up adjustment grid. You may choose to sort the side-by side comparison by status. The statistical summary provides the market overview statistics. The Listing Detail Options allow you to determine what listing reports you want to include with the CMA. You can choose to print details for every listing (adjusted and unadjusted) and you can specify what report you want to use. Also, you can specify whether to include a report of your adjustments at the bottom of each listing report. We recommend using this option.

To e-mail the CMA, click **E-mail** button. The standard flexmls™ Web e-mail page dialogue will appear.

To save the CMA, click **Save** button and type a name to save as a new CMA, or you may also replace an existing CMA. Your Saved CMAs are available by clicking **CMA** under Search on the main menu.

To view the CMA, click **View**. A new window will open with the report displayed. To print the CMA, click **Print**. A new window will open with the report displayed, followed by the Print window.

# General Adjustment Guidelines when comparing residential properties that are "typical" for the area.

A. Land to improvement ratios typically 20/80% to 30/70% ratio.
B. Typical size for the area and subdivision. Costs based on Marshall-Swift Residential Cost Handbook.

**Rule of Thumb**
40 to 50% of $/Square Foot of Gross Living Area (Sale Price divided by SF)

**Square Footage**
Properties from $75,000 to $120,000 - $25 – 30
Properties from $120,000 to $175,000 - $30 – 35
Properties from $175,000 to $225,000 - $35 – 40
Properties from $225,000 to $300,000 - $40 – 45
Properties from $300,000 to $500,000 - $50 – 55
Properties from $500,000 & up - $55 – 75

**Fireplace**
$1500 to $2500 (depends on the quality & price range of the home)

**Central Air Conditioning**
$1.50 per SF ($2.00 for dual)

**Basement Finish**
Fair & Average $5 – 10
Good $25 – 30
These figure are based on the age & the condition (professional finish, drywall, recessed lights). Add for wet bars, book cases, entertainment centers, baths, etc.

**Basement vs No Basement**
Square Foot $7 – 10
W/O vs nonW/O Basement $3 – 5
W/O vs No Basement $10 - 15

**Garage (attached or detached)** (considered Average to Good condition)
1 Car Garage $4000 – 5000
2 Car Garage $8000 – 10,000
3 Car Garage $15,000 – 20,000
Carport $500 – 1000 (based on quality)
**(Cost "new" may be higher) Built-in Garage valued in basement, consideration for "doors" only ($1000 per door).**
**\*\*\*If Garage is major selling point – value could be more**
**\*\*\*Side or rear entry garage vs front entry - $2000 – 3000**

**Kitchen – New or Updated**
$10,000 - $50,000
Depends on Price Range and Quality

**Condition**
Painting $1 – 2 per SF
Carpeting $1 – 2 per SF

**Exterior Siding**
Brick vs Wood $3 per SF
Vinyl/Alum. Vs Wood $1.5 per SF
Brick vs Vinyl $1.5 per SF

**Patio**
$2 per square foot
This amount depends on the condition & size.

**Deck**
$4 – 5 per square foot
Could be more if elaborate deck (maybe $7-10)

**Landscaping**
Based on the % of cost

**Bath – ½ & Full**
½ low $2,000 Full low $5,000
½ mid $3,000 Full mid $6,000
½ high $5,000 Full high $10000

**Time Value Adjustment**
3% per year since seller bought house

**Site & View**
Age & Condition $2,000 – 5,000
Pool 50% of cost (if it's a selling point)

**Other**
Ranch compared to Bi-level – Ranch is more desirable, make adjustment of $3000-5000
Privacy Fence – maybe $2000 – 5000
Hardwood Floors - $3-4 per SF

**Please Remember,**
these contributions in the marketplace should be reasonable and always market based. Cost doesn't always create value! The only real test is what a willing buyer would pay and a willing seller would accept.

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