

MaryAnn's Computer Corner

MLXchange Frequently asked Questions- Saved Search Manager

- 1. Q: I saved my clients criteria on the Search page under the Search Template box and now have way too many "Personal Templates". How do I move them under the clients name and delete them from the Search Template box?**

A: A Search Template is a group of visible fields that you use to enter search criteria. If you save search criteria to clients using the Save Template action, the *Personal Templates* area may become too large to manage in a timely manner. To save search criteria under each client which will store the searches in the Clients record, **first** click on the clients personal saved template, select the clients name from the **Client** list, and click on **Results**. Click **OK** to create a saved search and **YES** to set up the email Auto-Notification.

Second, decide which personal templates are no longer used. Go to the **Action** menu, click on **Template Manager** and click the go button. Choose the personal template no longer needed and click the Delete button (repeat until all personal templates not used are deleted).

- 2. Q: On the right side of the search page I have many saved searches I no longer need. How do I get rid of them?**

A: From the **Search** menu box, click on **Saved Search Manager**. OR, from the search screen, below the **Searches** click on the **Saved Search Manager** link. The Status defaults to the saved searches with **Auto-Notification On**. Select those no longer used, choose **Delete Search** from the Action menu and click to go button. Go back to the **Status** menu (upper left side of the screen) and select **Auto-Notification Off**. Select those no longer used, choose **Delete Search** and click to go button.

- 3. Q: In my clients record I see the emails I sent manually, but not the ones MLXchange sends automatically. Is there a way to keep those in the clients history?**

A: The Prospecting (auto-notification) feature in MLXchange is a means for members to have MLXchange automatically email new listings to prospects, clients and/or themselves. After clicking "Yes" to set up the Auto-Notification event, you will see the choice "**Save history of email notifications:**" Select the **Yes** choice if you would like the auto-delivered emails stored under the **History** tab in the Client Manager. Remember all listings sent manually or by Auto-Notification are also saved in the **Saved Search Manager** under **Results**.

- 4. Q: I received an email from MLXchange that one of my clients has selected not to receive e-mail notification from a Search I set up. Was my client and their search information deleted?**

A: MLXchange has an unsubscribe option for recipients of the Auto-Notification emails. Recipients of these automatic emails will see "If you wish to unsubscribe to this Property Match notification e-mail, [unsubscribe here](#)." If this unsubscribe link is chosen, the agent who set up the listing auto notification process will receive a Property Match-Unsubscribe Notification email to their primary email address informing them of this change. The client and search information are not deleted. The Auto-Notification is re-set to NO and in the **Saved Search Manager**, that client and search will be listed under the **Status: Auto-Notification Off**. Please do not turn the Auto-Notification back on without the recipient's approval.