

## MaryAnn's Computer Corner MLXchange v 3.0 Search Page tips

1. Search Type: This filter allows users to select and receive results from the following:
  - A. The 7 individual property types.
  - B. Cross Property type allows searching using "multiple" property types.

**TIP:** You would like to search for Residential, Condominium and Income properties that are "as is" or specify "handy man". This can be done by choosing the Cross Property type, the property types needed and the 'Remarks' field using the 'Contains' operator and typing in "handy man" or "as is" in the value box and clicking the ADD button.

- C. User and Office search type will allow you to find other members or office information quickly and **send emails directly** from the email address link.
- D. Search for Open Houses available by choosing the Open House type and filling in the fields necessary to narrow results found.

**TIP:** Once you have the Open House results, you can provide a valuable service by choosing and emailing the properties your clients would be interested in.

- E. Search for the history of a listing by choosing the Property History type. This search is performed using the property Tax Code.

**TIP:** If an incorrect tax code has been entered in MLXchange for a listing, the results will NOT be accurate.

2. Search Template: MLXchange now contains 4 default search templates which contain pre-selected fields grouped according to the search criteria needed. Check out the NEW, "**RES4 Address Search**" which allows users to search "multiple addresses", up to 10 at a time. You can add, filter and sort your own search fields by using the Template Manager.
3. Client Selection or ADD new client: With this filter you can choose existing clients to automatically save their search criteria, create and associate auto emails and associate listings. The "Add new client" icon allows new client information to be entered from the search page.

**TIP:** When talking with prospects, instead of recording their information on paper, which can be lost or misplaced, add them to the client manager from the SEARCH page in MLXchange for easy and quick future access. The only required fields are First Name and Last Name, but phone number, email address and client preferences would be essential information for future use.

4. NEW fields and field values added:
  - A. NEW picklist value, "FFM/1st Floor Master" added to the 'Inside Features' fields for the Residential, Farm and Condo property types.
  - B. NEW field called 'Water Type' was added in all property types except for Commercial, and included the following picklist values: AS/All Sports, NM/No Motor, POND/Pond, RIV/River, and RES/Restricted.
  - C. The picklist values under the 'Elem School Name' fields for the Residential, Vacant Land and Condo property types were modified from 'BRYANT' to 'BRYANT/PATTENGILL'. The 'PATTENGILL' choice was deleted from the list.
5. Adding additional fields to the Default Search Templates:
  - A. On the Search page, use the "Add more search criteria" tab to quickly add more search fields without having to create or edit a search template.
  - B. To save these fields go to the Action box, select Save Search and click the arrow button. Name the search, link it to a client and click OK. Those fields will only be saved in that search.