

MaryAnn's Computer Corner MLXchange Prospector and Saved Search Manager

MLXchange has many time-saving features Members can use. Below are a few tips for using the Prospector (email auto-notification feature) and the Saved Search Manager.

Prospector tips:

1. The Prospector feature is a means for members to have MLXchange automatically email listings to clients, themselves or both.
2. The Prospector will not send any listings from your search results. Listings already in the system need to be manually emailed.
3. Prospecting searches are set up either from the criteria input screen or the search Results screen. If the criteria entered produces zero listing results, you can choose to set up the prospecting search from the criteria screen in hopes a listing will enter the market matching the entered criteria values for your client.
4. You may use **Sys List Date** as a saved field to limit the search results for new Active listings. The Prospector will also send listings with other Statuses saved. To limit the search results remember to use the Date fields: (S) Sold Date, (X) Expr Date, (P) Cont Sign Date and (W) Status Change Date.
5. You may use the Map Area search instead of the broad Area number.
6. The client will see the **Search Name** you entered under the 'Search Name' tab in their delivered emails. It is recommended to include the client's name and criteria identifications such as area or price.
7. The Prospector runs about every 5 to 10 minutes, but listings will only be sent if a listing match is found and you have selected the **A.S.A.P** under **Frequency**. You can choose to have the matched listings sent **Daily** or **Monthly** instead.
8. To see the **clients name** in the "subject" line of the delivered listing emails, you **MUST** have inserted the clients name in the **Link to Client** field under the Saved Search Settings tab.
9. MLXchange is very client centered and saves all manual outgoing emails in the client's history **IF** the client is entered in the Client Manager. For the Prospector/auto emails, you must select the box next to **Save history of e-mail notifications to client** under the **Notification Settings** tab.

Saved Search Manager:

1. Access the Saved Search Manager from either the Home Page by clicking on **New Prospecting Matches**, the Search tab by clicking on **Saved Search Manager** or from the Search Page by clicking on **Saved Search Manager** under the Saved Searches section.
2. Prospecting events are not set up from the Saved Search Manager. The Saved Search Manager will allow you the following choices from the Action menu: **Modify Search Settings** (the default), **Edit Search Criteria**, **View Results** and **Delete Search**, for Prospecting Searches, Searches expiring in 3 days and Non-Prospecting Searches (only criteria saved).
3. All listings sent are saved under the **View Results action** or the **Results** button in the Saved Search Manager. The **Show New Matches** is the default, but to view ALL listings sent change the Filter to **Show all**.
4. **Send report to these Clients:** You can enter in up to 10 email addresses for delivery.
5. **Send this report to clients:** and **Send this report to your Primary E-mail Address:** You can choose to send a different report view to the client then the one you send yourself.
6. **Use this Email Template when sending notification:** You can customize the Email Templates to send different messages to Buyers, Sellers, Investors, etc.
7. Save sent listing notifications to the Clients record by checking the **Save history of e-mail notifications to client** box. To access the properties sent go to the Client Manager, select the client(s), click the Details button and History tab.
8. Prospector searches are saved for 180 days but you can choose to limit this time frame for prospects.
9. Use the **Resend notification email when:** you would like your clients notified of **List Price Changes** and when **Images are added**.
10. When the auto-notification is about to expire, you are notified on the MLXchange Home Page, **Searches expiring in 3 days** link AND you will be sent an email reminder to your primary email address.