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MLXchange v 4.0 – Useful Tips

by: MaryAnn Baer of MarketLinx

If you have any questions or need help with your settings, please call the AnswerLink support center @ 1-888-825-5472, M-F 8:30 AM – 5:30 PM EST.

- **PC Minimum Hardware:** PC with 1.8 GHz Intel Pentium 4 (or equivalent) with 256 KB integrated L2 cache, 512 MB RAM and 100 MB of available hard disk storage space or more.
  Recommended Hardware: PC with 2.8 GHz, Intel Pentium 4 (or equivalent) with 512 KB integrated L2 cache, 1 GB RAM and 100 MB of available hard disk storage space or more.

- Bi-directional Internet access with a 56 Kbps connection (higher speed cable modem, DSL or faster **is recommended**). The faster your Internet connection, the better MLXchange will perform.

- **Microsoft Windows Vista or Windows XP requires Service Pack 2:** If you are using Windows XP, you must be at Service Pack 2 or higher. You can update Windows XP from the Internet Explorer menu bar on the top left by clicking on Tools, Windows Update. If you don't update to Service Pack 2, you will get an error message when loading the application.

- **You must be using Microsoft Internet Explorer Version 7.0 as your Browser to access MLXchange.** To check what version you have installed, simply open Internet Explorer, click on **Help** and then click on **About Internet Explorer**. You can download and install the latest version of Internet Explorer 7 by clicking on Tools, Windows Update.

NOTE: MarketLinx software relies on Internet Explorer and does not support using other browsers such as AOL, MSN, Mozilla Firefox, Opera, Safari, etc. to run your MLXchange program.

- If you use AOL or MSN for your **Internet access**, connect, minimize the AOL or MSN browser screen and then launch Internet Explorer to access MLXchange.

- **Mandatory Internet Explorer cache Setting:** From the Internet Explorer menu bar Click on **Tools**, **Internet Options**, Browsing History **SETTINGS** button, under "Check for newer versions of stored pages:" select the TOP choice **"Every time I visit the webpage"** and click the **OK** button.

- **Pop-up Blockers:** MLXchange checks to see if you have a pop-up blocker enabled. If you have a pop up blocker, or several pop up blockers enabled (Yahoo, Google, etc.) you will need to set them to allow pop-ups from your MLXchange site. Click on Tools, Pop-up Blocker, Pop-up Blocker Settings, type in **aaar.mlxchange.com** in the **Address of website to allow:** box, click ADD and CLOSE.

- **Virus Scan Software:** Some older versions of anti-virus software may not recognize the programming techniques MLXchange uses. Make sure your anti-virus software is up to date.

- **Create a Shortcut on your Desktop:**
  To create a shortcut on your desktop open Internet Explorer, type in the URL (**http://aaar.mlxchange.com**) and login. At the MLXchange Home Page, click **File** on the Internet Explorer tool bar, select **Send,** select **Shortcut to Desktop**. From that point forward, just click on the MLXchange shortcut on your desktop.

- **Minimum Screen Resolution:** The minimum recommended screen resolution supported for MLXchange 4.0 is 1024 X 768 pixels. Using 800 X 600 pixels does not allow all the Action buttons to be displayed. To check or change your resolution, right click in an empty space on your desktop, click **Properties**, **Settings**. Under **Screen resolution,** move the slider bar to **1024x768** and click **Apply** then **Okay**. Note: This setting may make the icons on your desktop smaller. If you wish to increase them, follow the same steps above but click on **Advanced**. Under DPI Setting click on the button, select **Large size** and click **Okay**.

- **Do not use the Back/Forward buttons on the Internet Explorer tool bar** but rather make a habit of using the navigational (Action) buttons within the MLXchange application. Clicking on the I.E. Back/Forward buttons could produce error messages.

Customizing MLXchange:

One of the most important things you can do to optimize efficiency when using MLXchange is to customize the system to fit your MLS needs. By taking the time to customize your own **Search Templates**, **Column Layouts**, **Map View**, **Hotsheet settings, personal resources, custom report views, and CMA reports and presentations**, you can increase your efficiency by creating a system that lets you work your way.

▪ Customizing your Search Templates

A Search Template is a group of visible fields that you use to enter search criteria. Simple search templates expose only a few basic fields for entering criteria, while the most complex template would make every possible MLS field available. MLXchange has a number of System Search templates you can copy and customize to suit your specific needs, or you can create a new search template from scratch.

To customize an existing System Search Template(s):

1. Click the **Search tab** at the top of the page, the **Search** Quick Link or **Search for a Listing** from the Home page, Find a Listing section.
2. Select **Template Manager** from the Action menu in the lower left corner and click the arrow button.
3. Select the **Search Type**
4. Select one of the **Available Search Templates**, and click the **copy** button.
5. In the **Template Name** box enter in a template name (ex. My quick search or My complete search).
6. If you have an Office personnel/Broker access level, you may choose to create Search Templates for all the Agents in your office by selecting the **Office** option.
7. Review the **Selected items** list and remove those fields you do not want in this search template by clicking on the undesirable field and then on the arrow pointing left.
8. Select the field names you want in this search template from the **Available items** list by clicking on the desired field and then on the Arrow pointing right.
9. Change the positions of the fields by using the up/down arrows
10. To save the modified template, click the **Finish** button.
11. Click the **Done** button to return to the Search screen. Your customized template will now appear in the Search Template list for you to choose. Or, set this Search Template to load as your default by going to **Settings, Personalize, Personal Defaults, Saved Search,** select the template and click **Apply, Close**.

To make a new Search Template from scratch:

1. Select **Template Manager** from the Action menu and click the arrow button.
2. Select the **Search Type**
3. Click the **New** button
4. Enter a **Template Name.**
5. Select the fields that you want to appear in the search template.
6. Change the positions of the fields by using the up/down arrows.
7. Click the **Finish** button when you are satisfied with your list of fields.
8. Click the **Done** button to return to the Search screen. Follow step 11 above to set as the default.

▪ Customizing your Column Layouts

You can customize the column layout (grid) on the search Results page to show only the columns of information that you want, in the order you want them and choose how they will be sorted.

To customize an existing Column layout:

1. Conduct a search on the Search Criteria page in the **Search type** you want to customize a column layout and click the **Results** button.
2. Click on the Column Manager icon to the right of the **Columns** box (upper, left corner of page).
3. Click **Copy selected column report.**
4. In the **Grid Name** box enter in a column layout name (ex. Buyers grid, CMA, or My Complete)
5. If you have an Office personnel/Broker access level, you may choose to create Column Layouts for all the Agents in your office by selecting the **Office** option.
6. Remove those fields you do not wish displayed from the **Selected items** list.
7. Select the fields that you want to appear in the column layout from the **Available items** list.
8. Change the order of the fields by using the up/down arrows.
9. When you are satisfied with the list, click **Save.**
10. Click the **Done** button to return to the Search screen. Your customized results column will now appear in the Columns list for you to choose. Or, set this Column to load as your default by going to **Settings, Personalize, Personal Defaults, Results Grid,** select and click **Apply, Close**.

To make a new column layout:

1. Conduct a search on the Search Criteria page in the **Search type** you want to customize a column layout and click the **Results** button.
2. Click on the Column Manager icon to the right of the **Columns** box (upper, left corner of page).
3. Click **Create new column report**
4. In the **Grid Name** box enter in a column layout name (ex. Buyers grid, CMA, or My Complete)
5. Select the fields that you want to appear in the column layout from the **Available items** list.
6. Change the order of the fields by using the up/down arrows.
7. When you are satisfied with the list, click **Save,** then **Done.** Follow step 10 above to set as the default.

To change the default sort order for a column format you have created:
1. Select your personalized column layout from the **Available Column Reports** list and click on **Change field sort order**.
2. You can sort search results using this column format by up to three columns. Select the column **Fields** you want to sort, and specify if each column field should sort by ascending or descending value.
3. Click on **Save** when you are finished.

To change the field format: Customize the column layouts to print on one page by renaming the longer field names to shorter names. The column widths of the fields can be shortened to eliminate unnecessary white space.
1. Select your personalized column layout from the list of **Available Column Reports**, and click on **Change field format**.
2. Click on a field under **Column Header** and you can change the column settings. Click **Save** when you are finished.

NOTE: Setting Personal Selection Defaults - To EDIT the defaults for **each search type** in MLXchange, click on **Settings, Personalize, Personal Defaults**. Choose your preferred or personally created saved search template, results grid view, Short Summary View, Full Detail View, Email view, CMA binders and Listing Maintenance Search and click **Apply.** Continue this process with each Search Type used and then click **Close**.

- ## Set Map Search Default

When searching using the **Search Map** Area, the map opens to the MLS default view, which may not include the area you search regularly. To set your Map Area default:

1. Open the Search Criteria screen
2. Click on the **Search Map tab** (on the right of the Search Form tab)
3. Place your mouse cursor (looks like a hand) on the map, hold the left mouse button down and move the map North, South, East, or West to the desired map position. To bring the map to the zoom level desired, double click on an area of the map. Continue to double click on the area until the zoom level you require is achieved.
4. Locate the **Set My View** button at the bottom, right of the frame and click on it. If you are sure this is where you would like to set the default map view, click **OK** to use the current map position and zoom as your default for future searches.

- ## Set up Your Hotsheet Criteria

To set up or change your Hotsheet criteria, click on the **Change my criteria** link from the **Today's Hotsheet** on the Home Page (OR, click on the Hotsheet link or tab). Select which Sections, Property types and Area's you need. Go to the **Action** menu at the bottom left of your screen, select **Save Criteria**, and click the arrow button. Remember when printing your hotsheet from the results grid to select all sections, if not, only one section at a time will print**.**

- ## Set up Prospecting (E-mail Auto-Notification)

MLXchange will automatically E-mail you and/or your client when new properties matching their criteria are found. To set up an auto-notification:

1. Enter your customer/client information in the Client Manager.
2. Enter criteria into a search and associate it to the Client (the Client box is alphabetized by FIRST name).
3. Click **Results** and **OK** to create a saved search
4. **Search Name**: Accept the default name for the search or customize it
5. Verify the correct clients name is in the **Link to client** box
6. Click **YES** to **Use Auto-Notification:**
7. Select and check the appropriate boxes for this Client (who will receive the auto emails, which message template and report views, follow-up, history, frequency to be e-mailed, and resend options), and click **SAVE**.

- **Choosing your start-up page:** While most members prefer to begin at the Home page to utilize the quick links, you have the option of going directly to a specified screen when you first log in to MLXchange. For example, you may want to go directly to the main Search Criteria screen after you log into MLXchange. To change your start-up page:
  1. Click **Settings** in the top right corner of your screen.
  2. Click **Personalize** and then click **Personal Defaults**.
  3. From the **Start Menu** list, select the page that you want to load when your MLXchange starts up.
  4. Click **Apply, Close**. You will now automatically go to the selected screen every time you log in to MLXchange.
- **Adding useful links to your MLXchange Home page:** MLXchange enables you to set up your Home page to display links to your favorite Websites. Once you've set up your links, you can access them quickly at any time and remain in MLXchange. To create a new link: Click on **Settings, Personalize** and then click **Personalize Home Page Resource Links**. The Resource Links page will appear and will give you detailed instructions on adding links.
- **Upload your Agent Photo for Report Views:** Upload your agent photo for display in listing and CMA report views. Photos can be uploaded by clicking on **Tools**, **Images**, **Member Images**. Click on the **Add New Image** link under **Agent Photo**, click on Browse then find, select your photo and click the **Open** button. Use the Zoom tool to eliminate any white space (letterboxing) and click SAVE. Office staff can upload office images by selecting the **Office Images** link. The Agent Photo and Office logo are defaulted on some report views. Images can be added to personalized report views by using the Designer Tool or Report Manager.
- **Taking property photos:** Your camera's resolution setting determines how many pixels a photo contains. Every pixel adds to the picture file size, which increases the upload time. On your digital camera you can select from different resolution settings. Use the guidelines below:
  1. Original Images need to be in .JPG or .BMP (BMP images will be converted to JPG format).
  2. The maximum original image size limit is 6MB. **Loading images of 1 MB or less is recommended** to reduce upload time. Images are automatically compressed to approximately 25K to 50K after being uploaded.
  3. Most images are reduced in MLXchange to 512x400 pixels (landscape) or 400x512 pixels (portrait). Original images can be larger, **the recommended size being 1024x800**. It is not recommended they be smaller as the zoom tool would distort the image. Smaller images are NOT resized to be larger.
  4. If the image is larger, it is best to maintain a similar **aspect ratio.** This means 1024x800 has the same **aspect ratio** as 512x400. 1024x768 is close enough, but 1024x400 would not be very good.
  5. Other things that will cause errors when uploading images have to do with the name of the folder that the images are stored in, and possibly the name of the file themselves. For instance, if a folder name contains commas, dashes, slashes, or apostrophes, it will result in a "Fetching Error" for that image. This would not be an issue related to image resolution or size.
- **Upload Property Images:** You can add up to 10 photos for each property within the MLS system. These photos can be added after successfully submitting the listing data for immediate display in the system.

NOTE: The "original" image must be uploaded using IE 7.0. Uploading images using IE 6 will cause a problem with straight lines appearing as jagged lines on images.

1. Digitize the photo: Take photos with a digital camera or if using a 35mm camera, either scan it or have it processed digitally at your local photo-processing center. Store images on your hard drive or on a CD that you can access from your PC.
2. In MLXchange, go to **Tools, Images,** and **Listing Images.** This can also be accessed from the Home page, Find a Listing section or in Listing Maintenance after entering in the listing data.
3. Enter the ML #, and click on **Images**
4. Click on **Add New Image**, find the photo on your system (browse button), select the photo and click the **Open** button. Select **Image Name**, add **Comments,** use the Zoom tool to eliminate any white space.
5. Save it, add 9 more and you're done.

Need Help?

1. For more **helpful tips, on-line Training Seminars, PC maintenance** and to use the AnswerLink **"LIVE CHAT",** click on the **Help** link in the upper right corner of the MLXchange screen.
2. Detailed instructions are available in the MLXchange User Guide and informational documents found on the MLXchange Home Page, **Resources** section, **Association Resources**, **MLX Training Guides** and **MLX OnLine Training Tutorials.**