MarketLinx
Real Estate Information Technology

MaryAnn's MLXchange Corner

Clean out old saved data

Spring is a good time to clean out our saved, no longer used (or created by mistake) data in MLXchange and MLS Passport to keep the MLS system server running more efficiently.

1. Delete any no longer used, saved **Prospecting Searches (Auto-Notification On):**
   A. From the MLXchange Home Page click on the **New Prospecting matches** link**,** OR from the Search menu or Search Criteria page, click on **Saved Search Manager**.
   B. All your saved searches with Auto-Notification On will display.
   C. In the selection box mark all the dated, no longer used Prospecting Searches. Go to the Action menu, choose Delete Search and click the Go button (green box with white arrow).
   D. Click OK to delete the prospecting searches selected. This action will NOT delete the Client/Prospect.

2. Delete any **saved criteria only** searches (whether associated to a client or not):
   A. From the Status menu (upper left corner), choose **Auto-Notification Off.**
   B. All of the saved searches that are not set up for auto notification will display.
   C. Mark all no longer used searches, go to the Action menu choose Delete Search.
   D. Click OK. This action will NOT delete the Client/Prospect.

NOTE: MLS Passport users must be on line, click on Function, Flash and follow the above instructions.

3. Delete any custom created **Search Templates** or **Result Columns** in MLXchange:
   A. For Search Templates, go to the search screen and pick the property type desired. Go to the Action menu and click on Template Manager, go. Highlight the template no longer used and click the Delete button.
   B. For the Columns, go to the Results screen Action menu and select Column Manager, go. Highlight the grid no longer used and click on the Delete Column Report link.

4. Delete any **Action Plans** (MLXchange only). Hover your mouse on the **Schedule** menu and select **Plans Manager**. Mark the Plan Name, click Delete and OK.

NOTE: Deleting an Action Plan will also delete any "incomplete" client events associated to the plan(s). Completed events WILL BE stored in the client's history.

5. Delete any **CMA's** or **Buyer Presentations:** From the CMA Manager screen, mark the CMA/Buyer Presentation and click on the Delete button and then OK.

6. Delete any **CMA Presentation binders:** Hover your mouse on the **CMA** menu and click on **CMA Presentation Library.** Mark the presentation name no longer needed and click Delete.

7. Members who are using MLXchange as the clients "reply to" e-mail address, delete any dated messages in the **Messages** inbox. Verify the email is "matched" to a client and a copy will be saved in the clients history.

8. In **Passport,** delete any client folders, saved searches, property lists, CMA's and emails no longer needed. To delete the yellow contact folder with ALL the saved information, right click on it and select Delete. Do the same for the MLS Search, Property List, Email and CMA yellow folders. Open each of the above folders to delete specific, dated information.