



Performing a Simple Task is Quick & Easy using the Homepage

Here are some **Basic Tips** to help assist you with the most common features in MLXchange.

MLXchange Home Page

- From the homepage you can search for listings by ML# or Address.
- The message of the day section automatically appears with new messages and can be updated by Brokers and/ or Office Managers for their agents.
- The ability to add a new listing or modify an existing listing is accessible from the homepage.
- Large, descriptive menu buttons will help to decrease your learning curve.



Use the homepage shortcuts to reduce the amount of time it takes to perform common tasks. Additional tasks are just one click away.

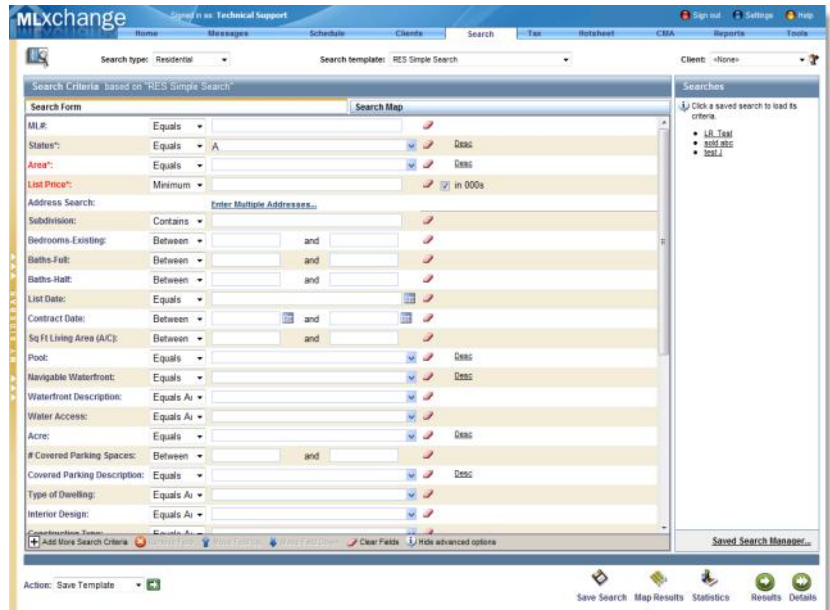
For even more helpful MLX tips please visit: <http://www.mlxhelp.com>



Basic Tips cont.

Search Criteria Screen

- Search criteria are presented in a list format. The amount and order of criteria can be customized.
- Enhanced mapping options with points of interest integration allows more flexible search parameters.
- View the listing count anytime for a subtotal of listings matching your criteria at that point.
- Use the Template Manager action item to create a search screen best suited to your needs. Save that search and set it as a default so it appears first when clicking search.
- Use the Additional Fields option along with the Remove Field, Move Field up and Field Down buttons to temporarily adjust your search screen on the fly.



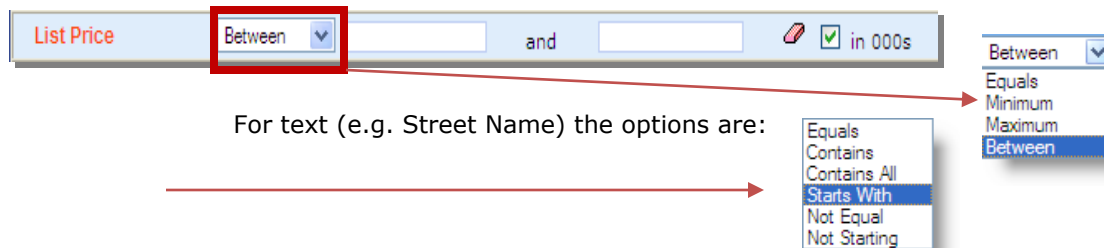
MLXchange Tips "Searching"

Required Fields – Before a search from the criteria screen can be conducted, one of the criteria in red on the screen must have a value (ONLY ONE).

Wild Cards – MLXchange does not require users to use the * or % signs to utilize wildcard search options. **On the Homepage** of MLXchange the "Find a Listing" search uses an automatic wild card at the end of the address field. You only need to enter the first letters of the street name.

In listing search, operators are used instead of wild cards to allow for greater flexibility in the search criteria being entered. Simply select how the value you entered should be searched by clicking on an operator from the pull down menu immediately to the right of the criteria label.

Example: For a numeric value (e.g. Price) the options are:



The most common MLS task needed to service your Buyers, Sellers, and Renters can be performed using the options available from the Criteria and Results screens.

For even more helpful MLX tips please visit: <http://www.mlxhelp.com>



Basic Tips cont.

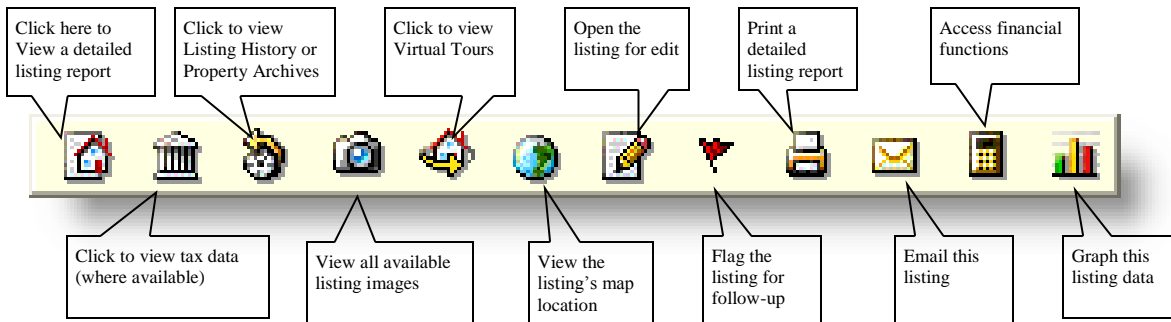
Search Results Screen

- From the listing results screen, link to additional supplemental listing information and compare that extra information for each listing selected, side by side.
- From the result screen, select listings and view, print or email point to point driving directions in the order you choose. You can even integrate points of interest along your route.
- Select from several CMA options that range from a one page quick comparison to a 10+ plus page formal presentation.
- Configure what type of one-line information you want to see at a glance and in what order, then save that view for future searches.

MLS#	Status	Area	Address	Subdivision	Beds	Baths	Pool	SF Lvl	Area	A/C	List Price	ADOM	Sale Price	Listing Associate	ID
2821496	A	5190	482 Harbor Drive	ADMIRALS COVE	6	7	Yes	10275	9,200,000	287				RHL3048514	
2725809	A	5310	12245 TILLYHOAST	OLD PALM GOLF CLUB - ROYAL PALM	6	7	Yes	9671	9,300,000	553				RHL30019179	
2928262	A	3112	605 Hibiscus Way	Hibiscus Beach	4	4	Yes	5000	9,500,000	74				RHL60487849	
2946072	A	4540	2050 NW 5th	Pine Trail Sec 04	2	1	No	1009	9,500,000	18				RHL2000820	
2723349	A	5001	1240 N OCEAN	ALTO LEO	8	9	No	8910	9,850,000	567				RHL90504828	
2746305	A	4160	498 S OCEAN	LAKE BOCA RATON	6	7	Yes	8125	9,900,000	636				RHL60590968	
2928926	A	4170	2481 Spanish River	Spanish River Land	5	6	Yes	9616	9,900,000	47				RHL20005127	
2946076	A	4320	11 NW 20th	Rolling Green Ridge Add 01	3	2	No	1536	9,900,000	19				RHL2000820	
2951845	A	4150	0 S Ocean	Highland Beach	0	0	No	0	9,950,000	336				RHL60487849	
2946084	A	5040	2000 SW MACK DAIRY	RANCH ESTATES,RANCH COLONY	9	6	Yes	7723	10,000,000	671				RHL20648626	
2886874	A	16	524 S BEACH	BLOWING ROCKS	5	5	Yes	6871	10,000,000	228				RHL30020597	
2846879	A	4680	123 SOME STREET TEST RWY	TEST FOR BOCA	3	Yes	3000	10,000,001	349					RHL20007938	
2924012	A	4120	8009 OLD OCEAN	BOYNTON AND	4	3	No	3646	10,500,000	64				RHL60596571	
2910511	A	5001	187 E BEAT	SEA ISLE EST N	4	5	Yes	4500	10,590,000	145				RHL90697946	
2729883	A	16	188 S BEACH	ISLAND BEACH	6	7	Yes	8179	10,900,000	543				RHL30339615	
2883384	A	16	320 S BEACH	Jupiter Island	5	6	No	5006	10,900,000	230				RHL30679819	
2914482	A	5190	388 Exale	ADMIRALS COVE	10	8	Yes	9777	10,900,000	133				RHL30459962	
2945452	A	5220	11987 Old Harbour	Lost Tree Village	4	5	Yes	10600	10,900,000	27				RHL40540972	
2969338	A	4150	3881 S OCEAN BLVD	HIGHLAND BEACH	7	9	Yes	9963	10,995,000	286				RHL60607819	
2885419	A	4150	3615 S OCEAN	HIGHLAND BEACH	5	6	Yes	8822	10,995,000	228				RHL60486308	
2884884	A	5210	100 BEARS CLUB	THE BEARS CLUB	6	6	Yes	6763	11,000,000	302				RHL20095443	
2924526	A	16	492 S BEACH	JUPITER ISLAND	6	7	Yes	7608	11,400,000	600				RHL90676203	
2928879	A	4120	6817 OLD OCEAN	BOYNTON SUB AIRBDD P	6	6	Yes	9266	11,500,000	65				RHL60596571	
2883802	A	4190	388 E Coconut Palm	Royal Palm Yacht & Country Club	6	7	Yes	10000	11,600,000	229				RHL20011401	

MLXchange Tips "Working with your Results"

Rolling your mouse over the Symbol, from the results screen, displays an icon box that allows you to view/print: detail listing data, tax info*, maps, etc.



The options below appear at the bottom of the results screen. The action buttons apply to all of the listings you have selected.





Basic How To's

How to Search for Listings

Step1 Click the menu option labeled Search.

Step2 Select the property type you wish to search from. →

Property Type: Residential/Condo

Step3 Enter your criteria in the appropriate search criteria boxes.

Step4 Select Results for a one-line summary or go straight to the listing Details.

Results Details

Note: You also have an option to view all of the matching listings on a map.

Map Results

How to Save a Search

Save Search

Step1 Enter your desired Search Criteria.

Step2 From the Results or Criteria screen Click the **Save Search** button.

Step3 Name the Search; optionally, you can type a description of the search and designate a client for the search.

Step4 Click **Save** (Note: If you want to be automatically notified of listings matching this saved search and/or your client to be notified, select yes in the field labeled "Activate this search" BEFORE clicking **Save**).

How to Email and Print Listings

Email

Print

To email a listing report



Step1 Select the listing(s) you wish to email by clicking in the empty check box to the left of the listing data.

Step2 Click the email button located on the bottom right corner of the screen (this option is also available from the detail report screen).

Step3 Select which listings are to be emailed, the report style, and the format the listings will display in, click **OK**.

Step4 Enter the recipient's e-mail or pick from list of previously saved contacts email addresses using the [click here](#) option then click **Send**

OR

Step1 Hover your mouse over the  symbol then select the  icon of the listing you wish to email.

To print a listing report

Step1 Select the listing(s) you wish to print by clicking in the empty check box to the left of the listing data.

Step2 Click the **Details** button at the bottom of the result screen.

Step3 Click **Print** located at the bottom right of the detail listing screen and select which report you want to print.

Step4 Click **OK**



OR

Step1 Select the listing(s) you wish to print by clicking in the empty check box to the left of the listing data.

Step2 Click the **Print** button located at the bottom right corner of the result screen.

Step3 Select which print options you wish to use (for detail reports make sure the Print report(s) option is selected) then click **OK**

OR

Step1 Hover your mouse over the  symbol then select the  icon of the listing you wish to Print.

Step2 Select which print options you wish to use (for detail reports make sure the Print report(s) option is selected) then click **OK**.



Pagination – With MLXchange all detail reports are automatically configured to fit to page.



Basic How To's Cont.

How to Create a CMA

CMA Manager (aka CMA History) contains your saved CMAs. It allows you to create new CMAs or to edit or copy existing ones. **CMA Manager** also contains the option to create custom CMA presentations with the **CMA Presentation Library**.

The **CMA Wizard** can be started from a listing search OR from an option on the main menu (**CMA > New CMA**). The CMA wizard gives you an opportunity to add/modify information in the following areas.

Step 1. Getting Started

Type of CMA (Seller/Buyer) / **Property Type** (selected already if you start from a search) / **Contacts** (choose, create or edit an existing contact) / **CMA Name** (pre populate, edit if needed).

Step 2. Subject Property

Subject property details can be Imported from an **MLS Search**, **Public Records** (where available) or **Manually Entered**.

Step 3. Comparables

The **Search Form** window opens by default allowing the search of MLS data for comparable properties. **NOTE:** To save time, you may want to create a saved search that includes only the CMA fields that you want to use.

The following options also allow you to add additional comps via: **Import comparable properties** from a different MLS Search. (Tip: Use the Search Map feature.). Import comparable properties from **Public Records** (if available). **Manual Entry** - Fill in the blanks, upload a photo, and plot on the map.

Reorder or remove comparables as needed. **Note:** Statistics option opens a printable page.

Step 4. Adjustments

Adjust any comparable property as needed. Enter a free form field description.

Step 5. Pricing

The default Selling Price calculation for the Subject Property is based on the average selling price of the sold listings within your CMA. Use the drop down list to select other options or manually enter a price and range.

Step 6. Netsheet

Create a New Charge - Enter the description, a fixed dollar amount or use a percentage.

Modify an existing charge – Highlight the line and then **Modify**.

Delete a charge – Highlight the line and then **Delete**.

Note: You may also create a set of default charges and apply as needed.

Step 7. Select Pages

Select the pages/reports that will make up your CMA presentation. Select the order of the reports by using the arrows at the bottom. **NOTE:** If you created your own custom presentations using the CMA Presentation Library apply it at this point.

New Report – Opens the Report Manager, allowing you to design from scratch.

Edit Report - Opens the Report Manager, allowing you to edit an existing report.

Copy Report - Opens the Report Manager, allowing you to copy an existing report.

Preview Report – Displays the report.

Step 8. View Report

The final **CMA Report** is displayed and can be printed (all pages or the current page), saved as a PDF, or emailed.

Individual reports/pages may also be edited in this step or may be removed from this presentation.

The completed CMA can be found in the **CMA Manager**.



Tips & Tricks

Email a Listing Report within a Personal Private Client Webpage Here is How:

- Conduct a listing search and locate the listings to be emailed on the results screen.
- Place a check mark next to the specific listings and select the "Send email" option from the bottom left action item list; (or point to the "Information" icon and select the "Email" option).
- When the email dialog box opens, select the radio button labeled "Within Agent Web Pages" at the bottom.
- Select the report style to be emailed click OK.
- Enter the required information on the next screen and send.

Benefits:

- This option gives your client some form of two-way interaction with you.
- The client/prospect only needs to keep track of one link/URL to view ALL of the listings you have sent.
- You are able to monitor which listings your client considers to be a favorite, possibility or not in the running.
- You are able to keep track of all emails (of this type) in the client detail record under the History tab.
- You can deactivate the client web site, thereby blocking access to all listing data you previously provided.



Remembering these 4 rules will help to ease your transition to MLXchange and enable you to teach yourself many of the new features and functions within the application.

RULE #1 DON'T USE YOUR INTERNET EXPLORER CONTROLS

Do not use the back, forward, stop, print, and email options within I.E. MLXchange contains those options..

RULE #2 READ THE SCREEN

Because we all have some experience using computer programs there is a tendency to scan the screen for what we feel should be there. This is a new application to you. There are many options, all clearly labeled make sure to read all of the options on a given screen.

RULE #3 WHEN UNSURE LOOK TO THE BOTTOM OF THE SCREEN

Unlike some other application you may use most of the action buttons in MLXchange are positioned along the bottom of the screen.

RULE #4 KNOW THE DIFFERENCE BETWEEN A REPORT & A PRESENTATION

In MLXchange you are given the opportunity to easily modify a report or a presentation. The steps are simple and buttons are clearly labeled to assist you provided you know the difference. A report is a single page or printout containing listing, tax, or CMA data. A presentation is a compilation of reports combined into a packet, for distribution. Presentations are normally created when preparing a CMA.

For even more helpful MLXchange tips please visit: <http://www.mlxhelp.com>



Basic How To's (Extras)

How to Input a new Listing



Find a Listing

Lookup by: Address or ML#

Separate multiple ML# by commas

- To enter a new listing just click the Add New listings link from the homepage.
- The Listing input format is in a straight line format. "Just fill in the blanks".
- While entering a listing, MLXchange saves after each entry automatically. You will never lose the data you have entered.
- Use your Mouse or Keyboard shortcuts to jump from field to field or to open dialog boxes.

How to Modify a Listing

To edit a listing, just search for that listing from the result screen, hover over the , then click the edit icon 

Inventory Watch

Active Listings	1
Expiring Within 7 Days	0
Pending Listings	0
Pending Sales	0
Sold Within 6 Months	0
Office - New This Week	0
Office - All Actives	37

[Refresh](#)

Note: A quick and easy method to search for your listings is to use the inventory watch section of the homepage.

ARE THERE VIDEOS TO HELP ME ALONG THE WAY? YES

Just click on “Help” at the top right corner of any screen.

HOW TO GET TO MLXCHANGE TO TRY IT OUT:

GRAR MLS Participants will be able to access MLXchange during the week of Nov. 10th. The URL is:

<http://nys.mlxchange.com>

To log into MLXchange, you will need to enter your **User ID** (GRAR Member Number). Then enter your **Password**, which for most users is their Grar.org password*.

* **Note:** As we are going to a ‘token-less’ security service for MLXchange, so you will not need to use your SafeMLS token to log into MLXchange. However, you will continue to use the token to log into the Tempo System until January 12th. If you are not sure of your password, contact GRAR Member Services at GRARHelpDesk@grar.net, 585-292-5000 or 800-292-7101.

Remember: You will need to continue to add and edit listings in Tempo through January 11. When taking new listings between now and then, you may want to take up to 16 photos of the new listings as well as capture data (ex. room dimensions) for the new additional fields that will be available on MLXchange. The new profile sheets will be needed for listings added on or after January 12.

Mark Your Calendar: Please mark your calendar now and plan to spend a day or two days updating your listings when MLXchange is made our primary system on January 12.

Contacts: There will be a one-time only process to copy your contacts/prospects, agent photo and brokerage logo into MLXchange from Tempo. Please watch for details. After that date, there will be no updates from Tempo to MLXchange with regard to contact info, agent photos or logos from that point forward. At that time you would need to add/edit contacts in both systems or start using the MLXchange contact as the source of your contact data. As stated before, the actual saved search criteria for each contact will need to be recreated in MLXchange and you will have until January 12 to get that completed.

NEED MORE INFO?

Please visit **<http://www.Grar.org>** for updated information regarding this conversion. After logging in, click on **Publications**. We will continually update this page with details as they are available including:

- Expanded Area, School District and Bodies of Water in all of NY State
- Link to interactive & printable maps of the City of Rochester neighborhoods.
- New profile sheets
- New MLS Rules
- Major field changes including a list of required fields.
- Info about use of smart phones to access MLXchange data

Questions? Contact GRAR Member Services at GRARHelpDesk@grar.net, 585-292-5000 or 800-292-7101.

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