Prospecting Workshop

For MLXchange

- *The purpose of this guide is to provide you with a detailed explanation of all options within MLX that allow you to share specific listing data with a client or prospect. This can be used as a companion guide to the "Prospecting Workshop" video available at http://www.mlxhelp.com*

Option 1 — Manually Email a listing report link

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 "Email" option from the bottom left action item list; (or point to the "Information" icon and select the "Email" icon).
- When the email dialog box opens, select the radio button labeled "Send link to selected property report(s)" at the bottom (Fig. 1).
- Select the report style to be emailed and click OK.
- Enter the required information on the next screen and send.

What will your client(s) need to do?

When your client receives the listing email, they will need to click the link specified in the email to view the listing data (Fig. 2).

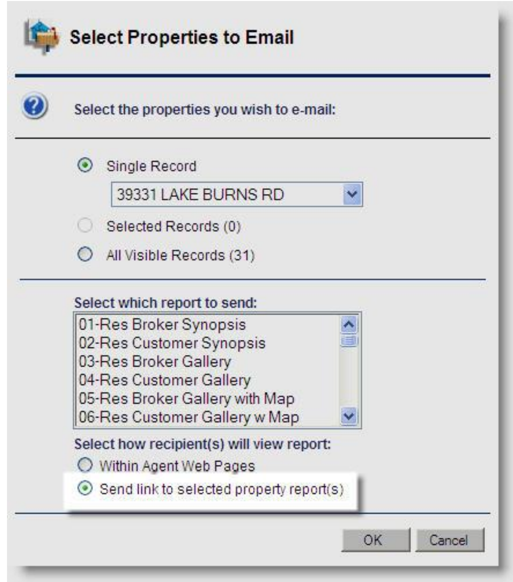


Fig 1

Benefits:

- This is the simplest way to deliver information to a prospect/client.
- Listing data emailed is always current when viewed.
- Recipients don't have to be in your MLX client list.

Limitations:

- If you email someone who is not on your client list, you will not have a record of the email sent (unless you cc: yourself).
- The report that is sent does not contain any features that allow any type of electronic interaction between you and your client.
- No linkage between the different sets of listings you've sent

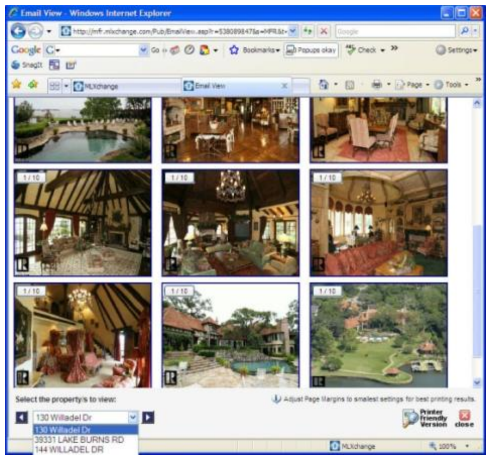


Fig 3

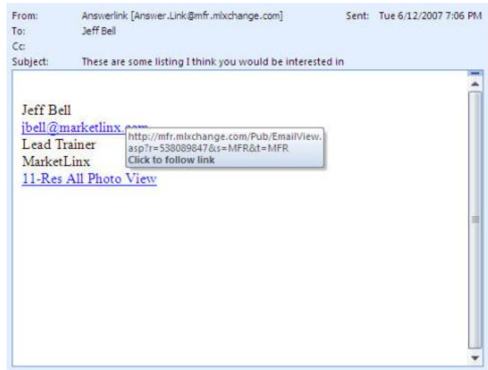


Fig 2

TIPS & TRICKS NOTE: If more than one listing is sent in a detail format, your client/prospect will need to click the left or right facing triangle at the bottom left to view the next detail report page (Fig. 3). Individual detailed listing reports are on separate pages to ensure your client is able to print a single listing, if they choose, without data being mixed from other listings.

Option 2 — Manually Email a Listing Report within a Personal Private Client Webpage aka “The Client Gateway”

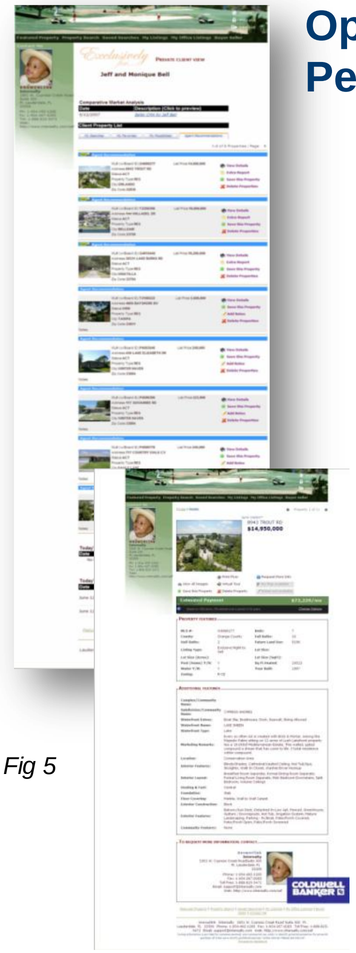


Fig 5

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 at the bottom of the screen; (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 (Fig. 4).
• Select the report style to be emailed click OK.
• Enter the required information on the next screen and send.

What will your client(s) need to do?

When your client receives the listing email from you, they will need to click the link specified in the email. The link will open up the “Private Client Web View” under the tabbed section labeled “Additional Properties” (Fig. 5). Previews of the listings you selected for your client will be tagged with the “New” symbol on each listing’s header.
For each of the listings sent to your client, they will have a choice to view a web-site based detail view that allows them to Print Flyers (pre-configured), request additional information, view additional images, view virtual tours, request map views, add notes, save the listing under a different category, and delete it. They will also (under the “Emailed Report” option”) be able to view the listing(s) in the format you selected when you e-mailed the link.

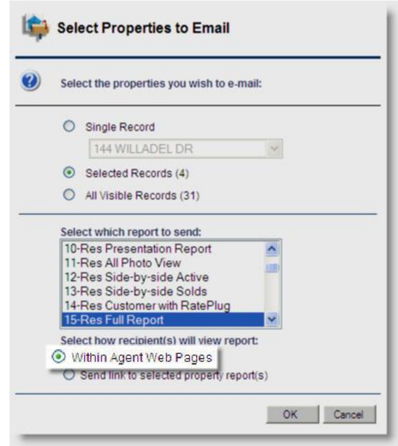


Fig 4

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/prospect 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.

Limitation:

•You are only able to email this view of listings to individuals you have entered into the MLX contact manager.
•Your client may need to click on the “Demo Site Features” tutorial to adequately take advantage of all available features.

TIPS & TRICKS NOTE: If you email more than one set of listings to a client, their web page link will incorporate all of the listings from all of the emails you’ve sent. Depending on which link they click, the listings from that emailed link will appear at the top of the Web Pages list of recommendations with the “New” symbol in the header for those listings.

Option 3 — Manually save and post listings to the Client Gateway

Here is How:

• Conduct a listing search and locate the listings to be set aside for your client.

• On the results screen, place a check mark next to the listings to be posted and select the "Associate to Client" option from the bottom left action item list.

• Select the client name that the listings are being saved for, and click OK.

Note: The next step needs to be done only if your client has not gone to their site before.

•Click "Clients" from the main menu bar. Select the client that you associated listings for. Click details at the bottom right. On the next screen, select "Email Private Link" from the action item list in the lower left corner. Send the link to your client.

What will your client(s) need to do?

When your client receives a link to their private website from you, they will need to click the link specified in the email. To navigate to the listings you have posted for them, they will need to select the tab labeled "Agent Recommendations".

Benefits:

• This option provides for two-way interaction between you and your client.
• You can remove selected listings from the client's web page.
• You can track status and price changes of the selected listings from the client detail record.
• Your client will only need to keep track of one web address to view all of the listings you have posted on their site.
• Notes can be attached to each listing, by you (from the listings detail view).
• Your client can send a message to you about that listing or respond to a note you left (This back and forth correspondence is date/time stamped). .
• A Private note can be attached to a listing. This message can only be viewed by you in the detail client record under the tab labeled "Property List" in MLX.

Limitation:

The only available view for each listing is the enhanced web page detail view (You cannot specify different report styles).

TIPS & TRICKS NOTE: By password protecting the Client Gateway, you are able to use a single website link for all your clients and post it on your webpage. This forces all clients/prospects to go to your site first then they are able to access their unique site via the link you posted and an email address and password . You can track the chosen category along with any notes sent to you by clicking on the MLX main menu item labeled "Clients" and viewing the last four columns for each client record. To turn on Password protection Click Settings>Personalize>Website Management>View the Client Webpage Options. Check the box labeled "Enable client login"

Option 4 — Save a Search and have MLX automatically post listings to the Client Gateway

Here is How:

Conduct a listing search using specific criteria for your client. On the results screen, select the “Save Search” option at the bottom. Name the search and select a client name to associate the search with. To enable automatic notification, select “Activate this search” option, select the appropriate options for you and your client/prospect and click OK.

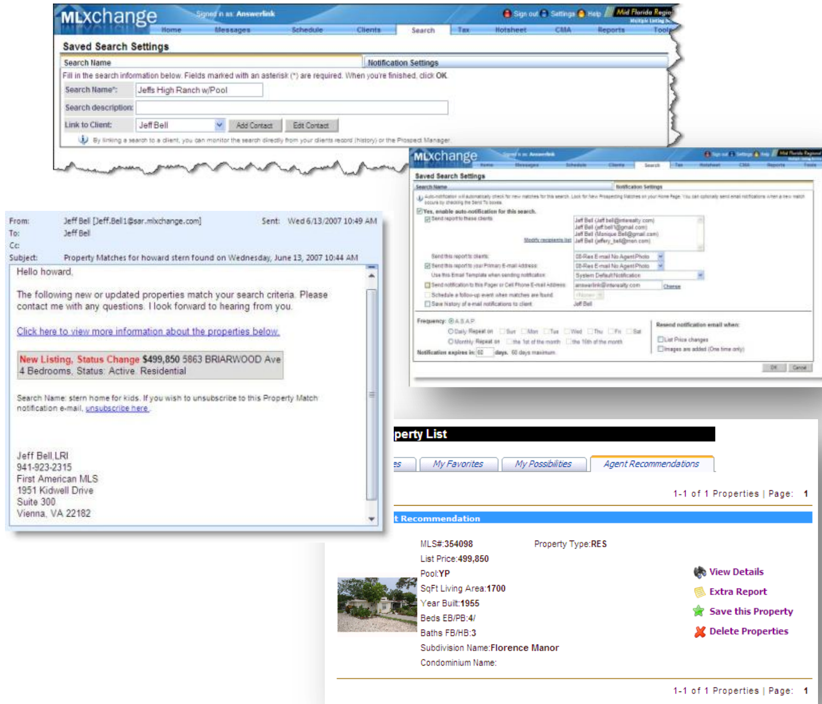
Note: MLX will now update your client or you with any listings that match the saved criteria, from that moment forward.

What will your client(s) need to do?

Your client will receive an email with brief information for each listing. To view details, they will need to click the accompanying link. The link opens the Client Gateway under the tabbed section labeled “My Searches”. Previews of all of the listings that match the saved search will appear. The list will be sorted with the most recent matches first.

Benefits:

• Your client will receive immediate and automatic notification of any listing which matches their criteria.
•Your client can choose to categorize the posted listing as a favorite, possibility or reject/delete it (you are able to view their selection).
• You are able to keep track of all emails (of this type) in the client detail record under the tab for History.
• This option gives you and your client some form of two-way interaction.
• Additional detail reports of your choice can be attached to each listing. This report is accessed from the detail view of the listing via the button labeled “Detail View”.



Limitation:

•Depending on your criteria, if your client does not monitor their web site, listings can accumulate under the “My Searches” tab. Your client needs to maintain this list by saving favorites and deleting unwanted properties.

•You are only able to auto notify listings to individuals you have entered into the MLX contact manager.

TIPS & TRICKS NOTE: If your client receives more than one set of listing notifications, their client web page will display all of the listings that match the criteria, sorted by the most recent (to match that criteria) first. This is regardless of which email link they click on. To view details for a particular listing from a specific email, they will need to remember some property information from the email in order to isolate that particular listing from the list of properties matching that criteria.