



MY PREFERENCES

In Flexmls

[Change default Report in Detail view](#)

[Expand fields in Quick Search](#)

[Show all your listings within My Listings](#)

[Enable Reverse Prospecting for all Contacts](#)

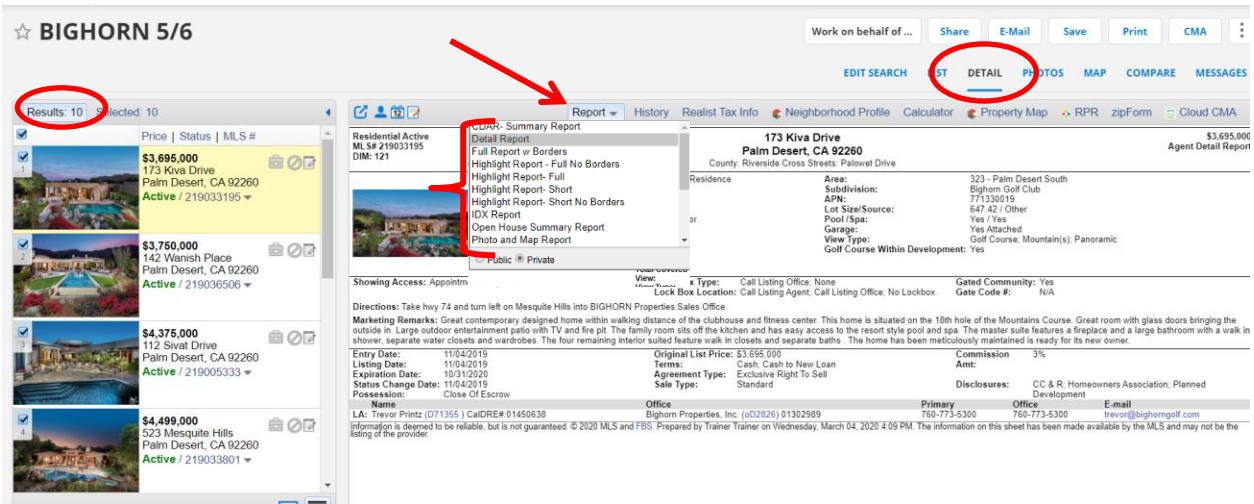
[Set first page viewed after login to the Quick Search page](#)

April 13, 2020

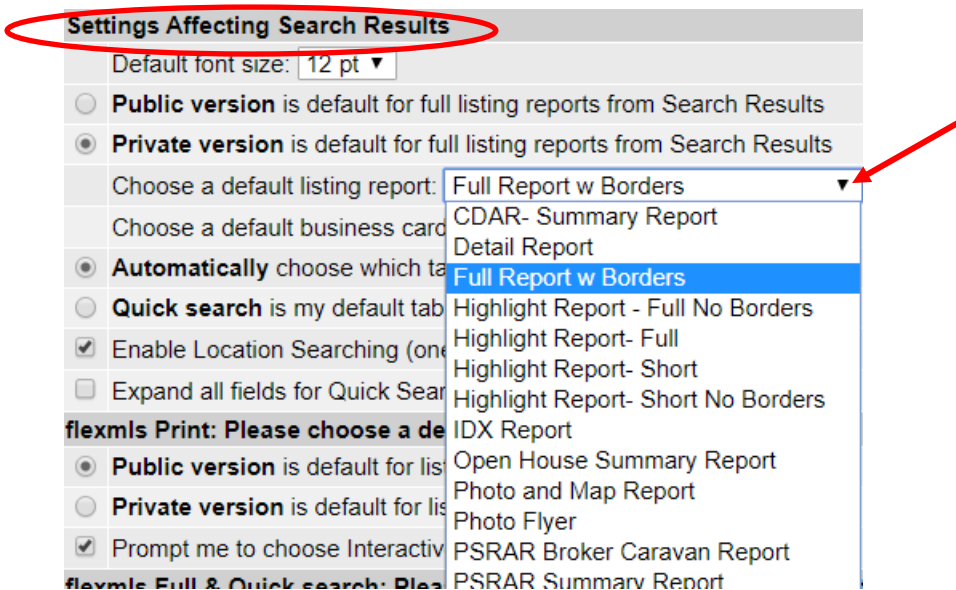
California Desert Association of Realtors
44475 Monterey Avenue
Palm Desert, Ca 92260
Training@Cdaronline.Org

CUSTOMIZE REPORT VIEW

This will set the default report used within Detail view



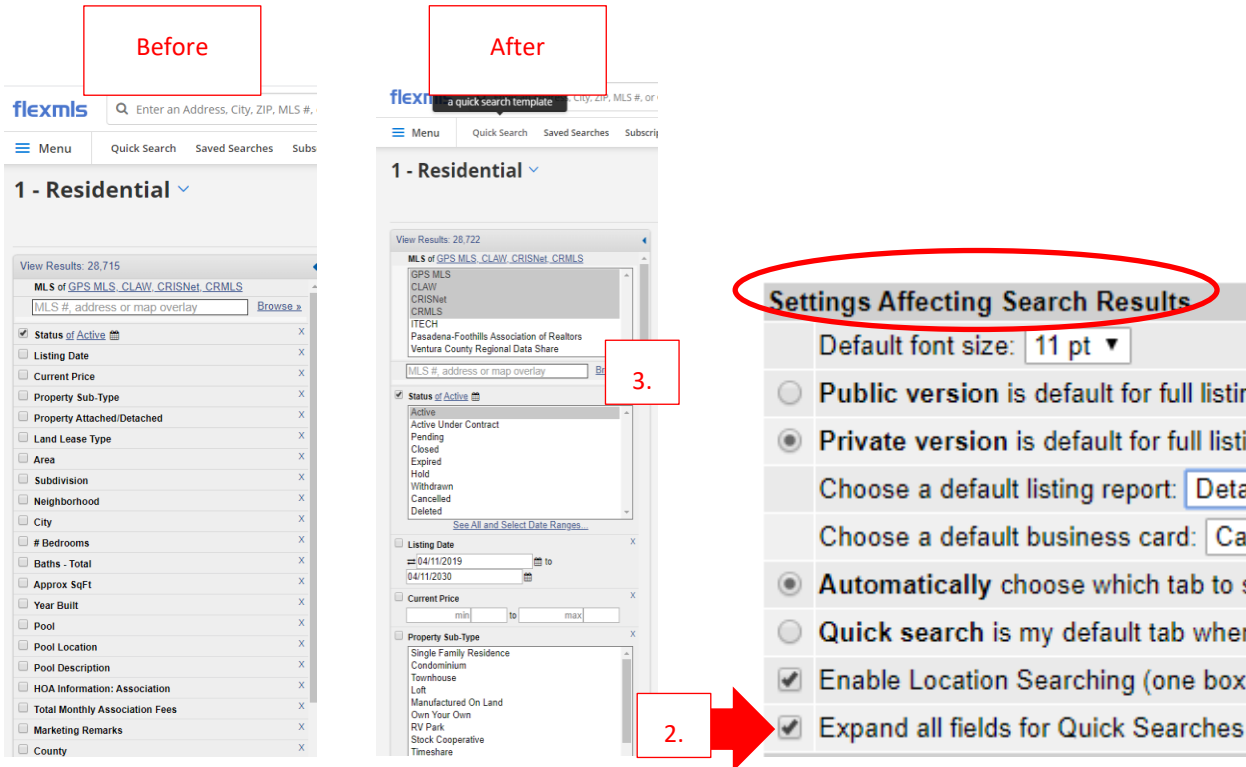
1. Go to Menu > Preferences > General Preferences > Settings Affecting Search Results.
2. Click the arrow and select a report from the list. This will be the default report when viewing results.



1. Be sure to "Save" at the bottom and center of the page after you have made all your changes in General Preferences.

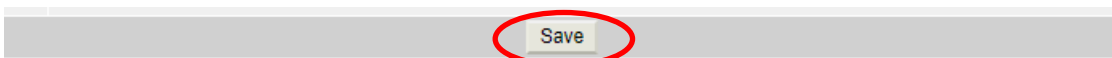
EXPAND SEARCH FIELDS

1. Go to Menu > Preferences > General Preferences > Settings Affecting Search Results
2. Select “Expand all fields for Quick Searches.”
3. The search fields will be expanded when you are doing a quick search.



The image illustrates the process of expanding search fields. On the left, two screenshots of the flexmls search results page are shown. The 'Before' screenshot shows a limited list of results, while the 'After' screenshot shows a significantly expanded list. A red box labeled '3.' points to the expanded results. On the right, a screenshot of the 'Settings Affecting Search Results' page shows the 'Expand all fields for Quick Searches' option checked, with a red box and arrow labeled '2.' pointing to it.

4. Be sure to “Save” at the bottom and center of the page after you have made all your changes in General Preferences.





MY LISTINGS VIEW

We will set General Preferences to show all your listings or the ones you choose.

Active, Active Under Contract, Pending, Closed, Expired, Hold, Withdrawn, Cancelled.

1. Go to Menu > Preferences > General Preferences > My Listings.
2. Select the status of listings you want to see in My Listings.
3. Enter 999 to always see the off-markets or put in the number of days back you want to see your off-market properties.

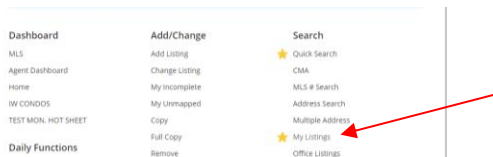
My Listings: Which statuses should be included?

- Active
- Active Under Contract
- Pending
- Closed
- Expired
- Hold
- Withdrawn
- Cancelled

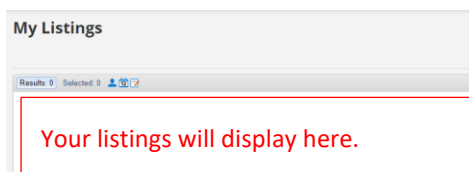
Off-Market listings older than this many days will not appear on the My Listings screen:

Days:

4. Go to Menu > Search > My Listings.



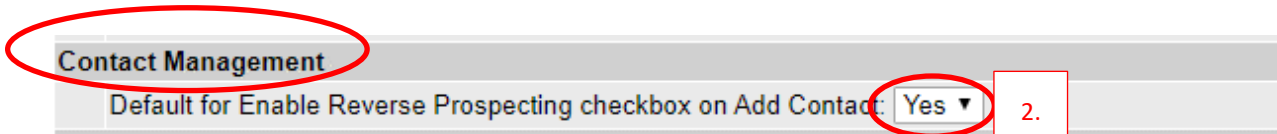
5. All the statuses you selected will now display in the “My Listings” section.



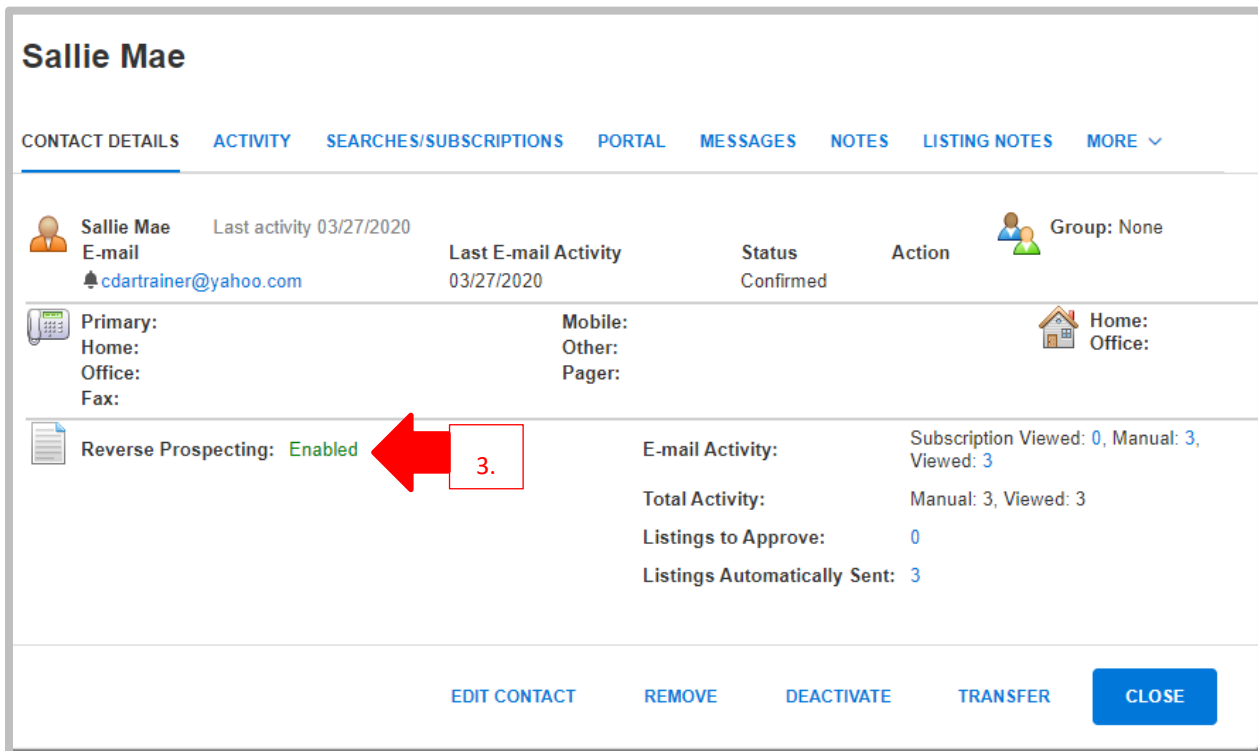
6. Be sure to “Save” bottom and center of the page.

ENABLE REVERSE PROSPECTING

1. Go to Menu > Preferences > General Preferences.
2. Select yes from the dropdown arrow under Contact Management.






3. Now when you add a contact they will automatically be enabled for reverse prospecting.




Sallie Mae




CONTACT DETAILS ACTIVITY SEARCHES/SUBSCRIPTIONS PORTAL MESSAGES NOTES LISTING NOTES MORE ▾

 **Sallie Mae** Last activity 03/27/2020 Last E-mail Activity 03/27/2020 Status Confirmed Action  Group: None

 **Primary:**
Home:
Office:
Fax:

Mobile:
Other:
Pager:

 **Home:**
Office:

 **Reverse Prospecting:** Enabled   E-mail Activity: Subscription Viewed: 0, Manual: 3, Viewed: 3

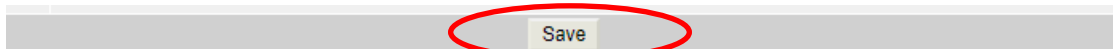
Total Activity: Manual: 3, Viewed: 3

Listings to Approve: 0

Listings Automatically Sent: 3

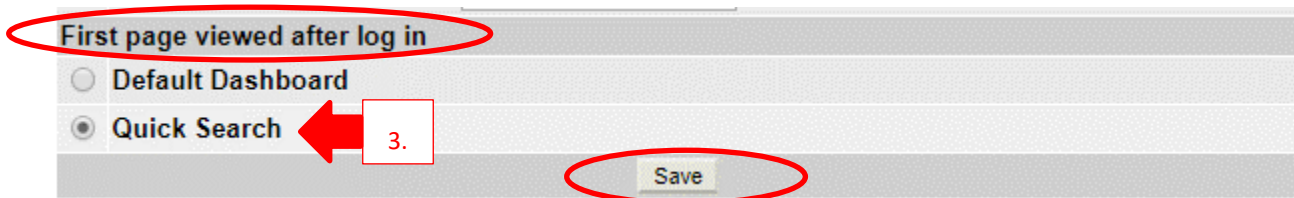
[EDIT CONTACT](#) [REMOVE](#) [DEACTIVATE](#) [TRANSFER](#) [CLOSE](#)

4. Be sure to "Save" at the bottom and center of the page.



FIRST PAGE VIEWED AFTER LOGIN

1. Go to Menu > Preferences > General Preferences.
2. Go to the bottom of the page under “First page viewed after log in.”
3. Select “Quick Search” and click the save button.



4. The next time you go into Flex you will go straight into the quick search page.
5. Click the Flexmls logo to go back to the agent dashboard from anywhere within Flexmls.

