Optimizing MLXchange

The 10 things you can do today that will make MLXchange work more efficiently for you:

1. **Create a desktop shortcut to the MLXchange Homepage**
   To create a desktop shortcut to the MLXchange Homepage:
   a. Access the MLXchange Homepage (not the login screen)
   b. On your menu bar in the upper left of the screen, click on "File"
   c. Scroll down to "Send"
   d. Scroll over to "Shortcut to Desktop"
   The next time you want to login to MLXchange, just click on the icon on your desktop after connecting to the internet, it will take you directly to the login screen.

2. **Create search templates**
   Every property class has 2 or 3 templates to choose from for searching, designed by the MLS, yet most users only use perhaps 4-8 fields to perform a search on a regular basis. Create search templates that display only the fields you use in your searches.
   To create a search template:
   a. From the search screen, locate the action box in the lower left corner
   b. Select "Template Manager" from the listed actions
   c. Click on "New" or "Copy" button
   d. Provide a name for your template
   e. Create the template by selecting the fields from the left box, clicking on the arrow and moving them to the right box. Use the up and down arrow keys in the right box to place the fields in the order that you would like to see them on your template.
   f. Decide if you would like this to be your default template for this property class (presented every time you do a search in this property class) and click in the designated check box if "yes".
   g. Click on "Finish"
   h. Click on "Done"

3. **Create custom results grids using Grid Manager**
   The results grid is where you see the first information regarding the matches from your search. The default system grids are defined by the MLS. To get the information you would like on the grid create your own custom results grids.
   To create a custom results grid:
   a. Add search criteria and click on "Results"
   b. Locate the action box in the lower left corner
   c. Select "Column Manager" from the available actions
   d. Select "Create a New" or "Copy Selected Column" Report.
   e. Provide a name for your Column Report
   f. Choose fields in the left box, click on arrow, and move to the right box. Use up and down arrows in the right box to list the fields in the order that you would like to see them.
   g. Click on Finish
   h. Click on Done
   Once you've done this, you will have a new grid available to you in the list in the upper left corner of your results screen, select your new grid to see how your information is displayed.

4. **Set all your search defaults in Settings**
   Being able to customize search templates is nice, but it's a pain to switch from the system defaults to your custom template every time, so set up your search defaults under "Settings"
   To set up your search defaults:
   a. Click on "Settings" in the upper right of any MLXchange screen
   b. Click on "Personalize"
   c. Click on "Personal Defaults"
      From this screen you will see that there are a number of things that you can tailor to your work habits.
      1. Start Menu – what screen is presented when you open MLXchange
      2. Search Default – Which search is presented (property class) when you open a search
      3. Saved Search – which search template by default appears in your search
      4. Results Grid – which results grid appears, by default, in your search
      5. Report View – which view appears in the drop down box in your results grid.
      6. Full View – which view should be presented as your Full View on the Details screen.
      7. Email View – which view should be considered your default email view
      8. Buyer CMA Binder – Which CMA should be considered your default Buyer CMA
      9. Seller CMA Binder – Which CMA should be considered your default Seller CMA.
   d. Click on Apply
   e. Click on Close

5. **Choose your 6 favorite views**
   The list of views available in the Details screen is entensive. Most people have favorites, and use the same views over and over again. 6 views can be selected (for each property class) and displayed below the list box on the detail screen for easy selection.
   To select your 6 favorite views:
   a. Click on "Settings" in the upper right of any MLXchange screen
   b. Click on "Personalize"
   c. Click on "Edit Favorites"
   d. Select your 6 favorite views from the box on the left, click on the arrow to move them to the box on the right.
   e. Click on "Finish"
      The 6 views you select will appear below the list box on the details screen, apart from the rest of the views, making for easy selection.

6. **Set up your hotsheet**
   By default the hotsheet contains all sections for all Property Types for all Areas. Most people don't work that way.
   To customize your hotsheet:
   a. Select only the Sections you want to use
   b. Select only the Property Classes you want to use
   c. Select only the Areas you want to use
   d. Locate the action box in the lower left corner of the screen
   e. Select the "Save Criteria" option
      From this point forward only your saved criteria will be presented every time you run the hotsheet. You can only save one batch of criteria as applied to all types of hotsheets.

7. **Run a Personal Hotsheet**
   With the introduction of the Days Back hotsheet a long time ago, people have forgotten the old "time stamped" hotsheet that was the most efficient way to run a hotsheet. This hotsheet will reference the last date and time you ran your "Personal Hotsheet" and provide you with only updated information. The Personal Hotsheet is different from all the other hotsheet types in that it is the only hotsheet that doesn't reference midnight as a reference point, rather, it references the LAST TIME YOU RAN A PERSONAL HOTSHEET, and therefore provides a truly comprehensive update.
   To run a Personal Hotsheet:
   a. Locate the "Hotsheet type" selection box in the upper left of the hotsheet screen
   b. Select "Personal Hotsheet" from the available choices.

8. **Enter your Clients email address in the Client Record**
   When you add a new client in the Client section of MLXchange, be certain to add their email address along with the other information.
   To add a new client to MLXchange:
   a. Select "Clients" from the MLXchange menu bar
   b. Click on "Add New Client"
   c. Enter required information and at LEAST their email address beyond that
      When you enter a clients email address in the client record, you won't have to continually add it every time you want to send them and email from MLXchange. It will also enable you to "auto-notify" your clients when new matching properties become available.

9. **Set up Flash**
   MLXchange will automatically notify both you and your clients when new properties are listed that match your (client's) criteria.
   To set up the Flash (Prospecting) function:
   a. Load your criteria into a search
   b. Click on the "Results" button
   c. Locate the action box in the lower left corner of the results screen
   d. Select "Save Search" from the available actions
   e. Provide a name for your search
   f. Associate your search to one of your clients
   g. Select "Enable Auto-Notification for Search" "Yes"
   h. Select which email should be auto-notified – you, your client, or both
   i. Select the report you want emailed if other than default.

10. **Set Map Search Default**
   When searching using 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:
   a. Open the Search criteria screen
   b. Click on "Select Map Area"
   c. Using the North, South, East, West labels, diagonals, and zoom level, bring the map to the area and zoom level you desire.
   d. Locate the check box at the bottom of the frame labled "Save current map center and zoom level as user default"
   e. Click in the check box, and click "OK"