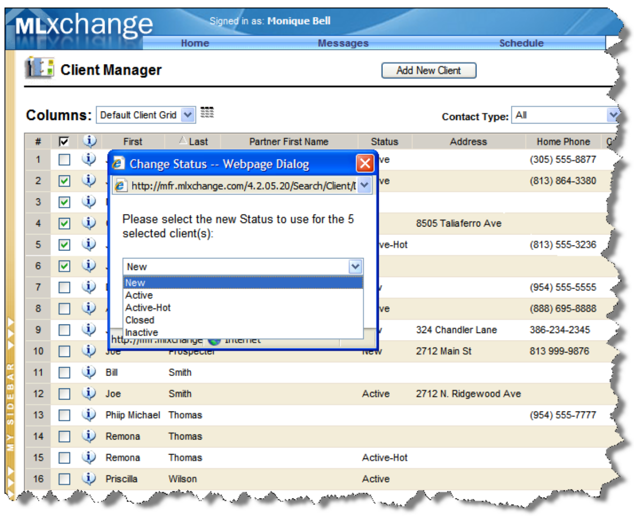
Quick Tips &Tricks

"Client Gateway aka Private Client View" Feature Guide

In MLX the Client Gateway (previously referred to as Private Client View) has been enhanced to, "Reduce steps for users by becoming more intuitive" & "Provide more Agent controlled options for Contacts while making their site less complicated". ……………………..Here's how

For the Agent

Client Status: More than just a label, Status (Active, Active Hot, and Inactive) is now used to provide additional options to clients/prospects.



Automated tasks are associated with client status types:

By e-mailing a client/prospect, whose Status is not set to Active listings (manually or via auto notification from prospecting), MLX will automatically change the clients status to "Active"

If you manually change a status to "Inactive" MLX will automatically deactivate the auto notification for that client's searches.

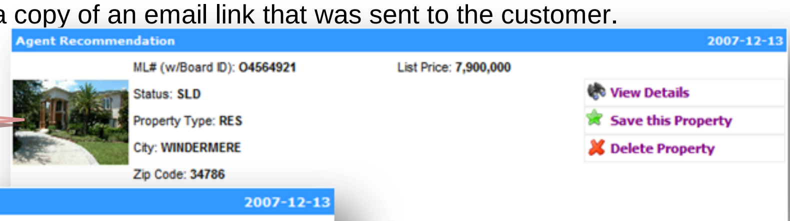
Fig. 1

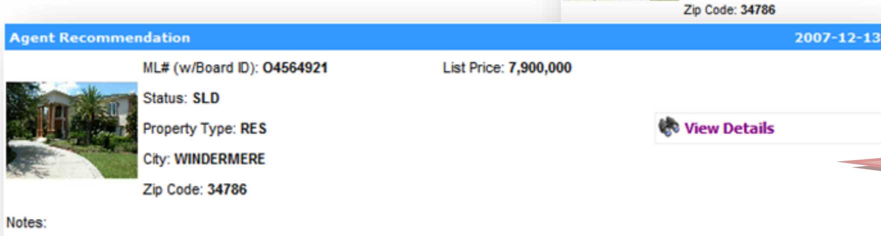
Client Gateway: There are now two views to the Private Client View (Client Gateway): ***Agent View*** and ***Client View***. The major difference is that not all of the options available to the Client are viewable by the Agent. This allows an agent to view a client's webpage without the risk of changing the client's Favorites, Possibilities, Deletions, and other personal settings.

To preview the clie**nt's** webpage in the ***Agent View***, f***rom*** the Client Manager **Results** screen**,** select the client whose website you would like to view and then click the **Details** button located at the lower **right** corner of the screen. From the Detail Client Record, either select the tab at the top of the screen labeled Web View and click the link labeled View Page on the top left section of the Client Gateway options page or go to the bottom left of the screen to the Action box and select Preview Client Website.

To preview this page the way the client will see it, just log out of MLXChange and refresh the client webpage in Internet Explorer or simply click on a copy of an email link that was sent to the customer.

Client Mode
Fig. 2





Agent Mode
Fig. 3

The **Report Styles** that display in the report list available on the Listing Detail View of the Client Gateway (fig. 4) are only available to clients with a status of “Active” or “Active-Hot.” Reports available include your e-mailed report and Internet Report. Additional report options including your custom reports can be added to the list at the discretion of the MLS/Association.

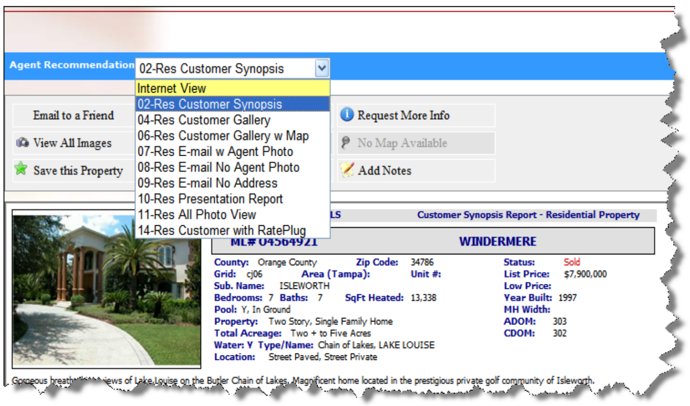


Fig. 4

The status of “New” “Closed” or “Inactive” are limited to the Internet View on the Client Gateway (Fig.5)

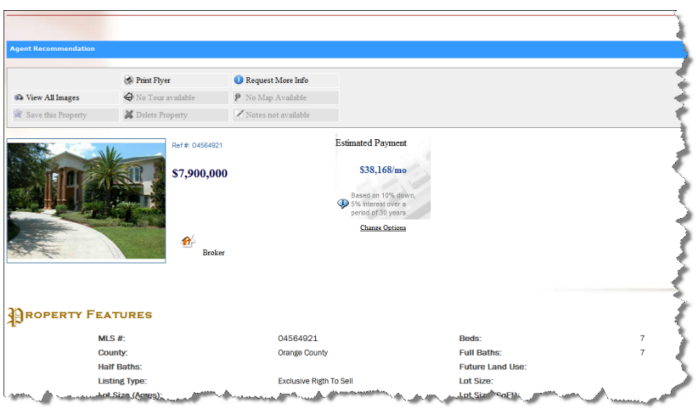


Fig. 5

For the Client

“More User Options and Less Complex to Clients”

In Client Gateway listings are Now stored in three Categories. Depending upon the mode of delivery:

- Listings e-mailed automatically using the prospector feature are stored under the My Searches tab. To view these Listings your client need only click on the link that is emailed to them automatically. The link takes them directly to all listings that match the search criteria they are being notified about. They can then save any of these in the list to their personal favorites list.

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.

- Listings flagged with "associate to client" are stored under Agent Recommendations tab. These are listings you have viewed from the results screen of a search and manually selected for your client by clicking Associate from the bottom left action menu.
- Listings e-mailed manually can be found under the Additional Properties tab where clients can save listings as Favorites and Possibilities or Delete listings using Reject with notes attached

Easier Management of Client Listings:

- Clients now have the ability to sort their list of properties as they see fit.
- Listings associated to a client's website by the agent, display the date on the top left of that listing to indicate to the client when that listing was saved to the site.
    - For listings that are manually emailed the date is not displayed. To determine which listing was added from which email the client only needs to click on the email they received from the agent. Their website will automatically open with the listings selected by the agent for that email displayed at the top of the list with a yellow "New" symbol next to it.

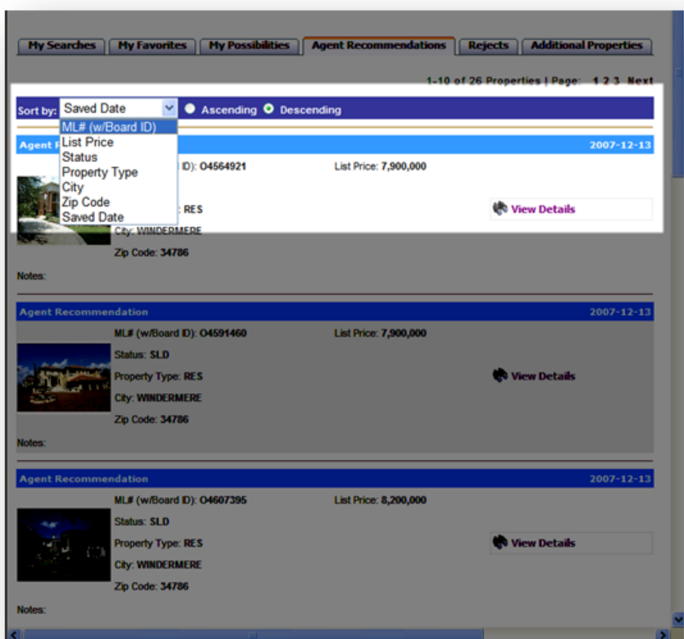


Fig. 6

Enhanced Detail View for Clients:

From the Detail View of any listing, clients (with the proper status) now have the ability to view and print additional report styles including multi photo and flyer views to share with others (fig4.) .

Note: Some options discussed in this doc may not be available for all Board's/MLS's.