Client Dashboard Manual

VESTAPLUS™

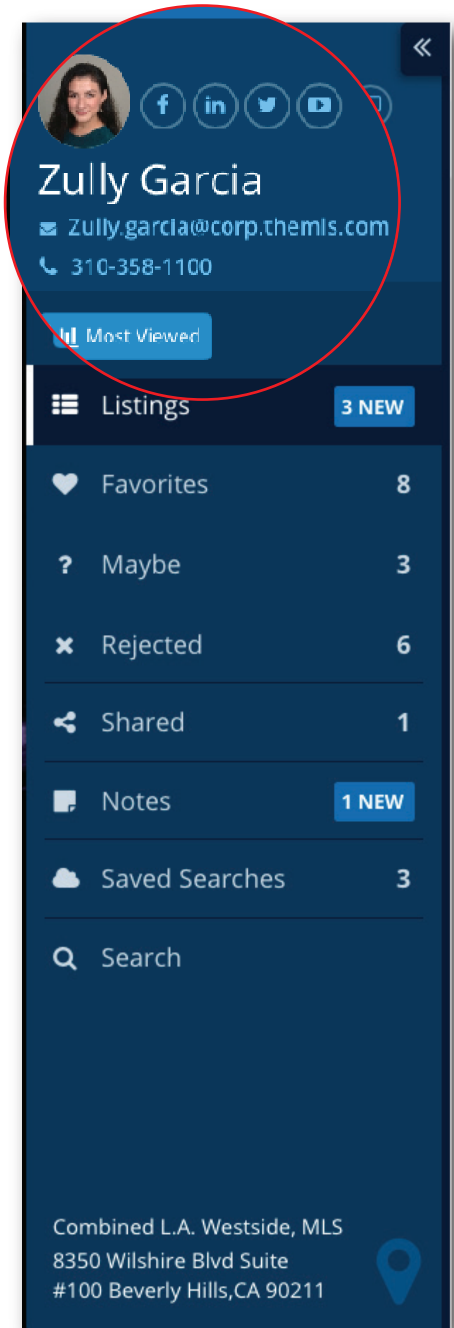
MLS Software Solutions

Connect with Clients in Real Time.

THE MLS™

Table of Contents:

Overview:



Client Dashboard: Home Buyer's View
Showing an agent branded dashboard

In today's fast paced real estate industry, real time communication is essential between real estate agents and clients. The Client Dashboard provides that and more:

• **Most Viewed**, provides agents with a report on how many times a client viewed the most viewed listings and the last time they viewed those listings, as well as the client's rating of the listings, the client's notes about the listings, and the price of the listings.

• **Track** client activity, rated properties, notes, and shared texts, emails, and notifications.

• **Email Notifications** are received when your clients create notes, rate properties, and view listings.

• **Client Activity Reports** are sent daily to your inbox, so you can stay organized and up-to-date with your clients' needs.

• **Save Search** allows you to save your search criteria for a client and setup a notification schedule, so your client can be alerted when a new listing goes on the market or changes price, etc., and matches his/her criteria.

• **Branded Dashboard** lets you link to your social media pages, include your email, and your phone number. The client only sees your contact information and no other agents appear on site.

• **Shared** keeps track of all emails and texts you send to your client from within the MLS system. The feature also keeps track of what reports were shared with your client and whether or not you received a copy of the email.

• **Notes** allow clients and agents to create a note on a listing so both parties can keep track of what was discussed about a specific listing.

The Client Dashboard also comes with two major add-ons you can provide to your clients:

• The **Search** feature allows clients to search for listings in real time and notifies you of his/her interests.

• The **Suggested Only dashboard configuration** allows agents to suggest listings to clients, letting clients only see the listings the agent has suggested. This is a great tool for agents who want to have more control of what information their clients see on the dashboard.

Setting Up a Client Dashboard - SAVING A SEARCH WITH AUTO NOTIFICATION:

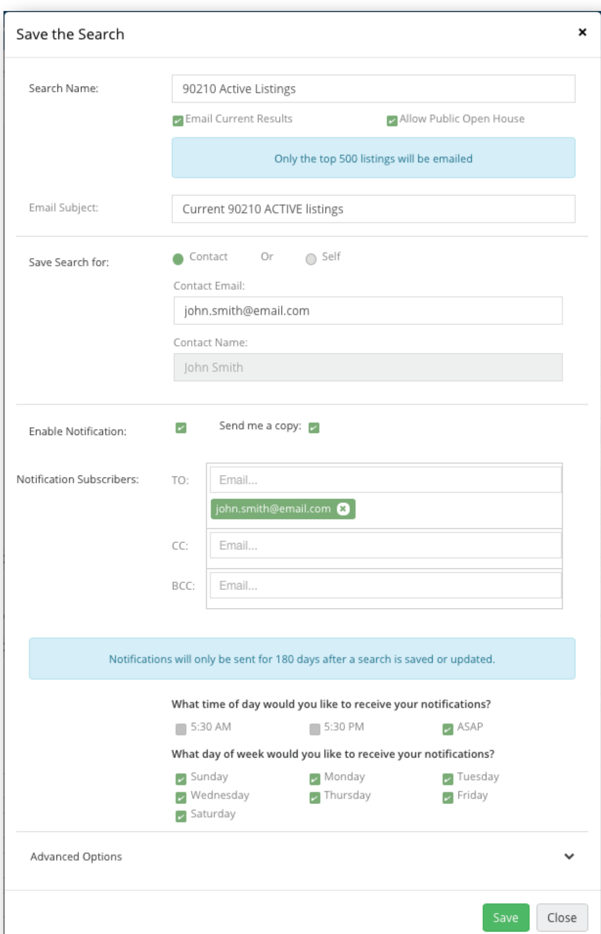
Quick Setup	
Login	Log into The MLS™ system.
Quick Search	Enter a location and click search to load the listing search.
Additional Criteria	Enter criteria in the Basic Criteria section and/or click on a section below to expand the search form and add additional criteria.
Save a Search SAVE SEARCH	Click on the SAVE SEARCH button located at the top of the page, next to the green VIEW LISTINGS button, to load the Save Search form.
Name your Search	Name your search and check any of the options below: a. Select Email Current Results to email up to 500 listings from your search result. It is recommended that you only use this feature when your search result is less than 20 listings. b. Allow Public Open House information on the email notifications.
Email Subject Line	Enter a custom subject line for your email notification. If no subject is provided, the system will display the Search Name. **Tip:** You can change your email subject anytime. Recommended Email Subjects should include either your client's name (so your clients know it is not Spam) or your name (so your clients know who is the originator of the notification).
Contact or Self	Select the radio button for Contact or Self.
Contact Email	If you select the radio button for Contact, then enter the primary contact for the dashboard by entering the client's email address. **Note:** New contacts will automatically be added to your Contacts list.
Contact Name	Enter the primary contact name by typing his/her full name in the field.
Enable Notification	Check the box to enable automatic email notification for this Saved Search.
Send Me a Copy	Select the 'Send me a copy' checkbox to receive your own automatic email notifications ("auto notifications") for this Saved Search.
Add Additional Notification Subscribers	Add additional subscribers to the notification by entering their email addresses in the TO, CC, and/or BCC fields. **Note:** Please note that the primary contact of the dashboard is displayed in green and secondary contacts are displayed in a white box with blue text and a blue border. Primary contacts will be the owner of the dashboard.

Continued...

Setting Up a Client Dashboard - SAVING A SEARCH WITH AUTO NOTIFICATION:

Quick Setup...Continued

Setup Notification Schedule	Select the time of day that you would like your client to receive the auto notification email by clicking 5:30 AM or 5:30 PM or ASAP. Select what day(s) of the week you would like your client to receive the auto notification.
Enable Client Search	To enable your client to be able to search for listings, click the Advanced Options, and select the checkbox Enable Client Search to provide your clients with a mobile and a desktop search capability while using the Client Dashboard.
Suggested Only	To enable a Suggested Only dashboard, click on the Suggested Only checkbox. **Note:** This feature will prevent all auto notifications from going to your client and will allow you to suggest listings to your client. This feature ensures that your client is only seeing the listings you want them to see based on your suggestions.
Save your Search	Click the green Save button to save the search. **Note:** It is not required to have your clients receive auto notifications.



Save The Search form

Invite Clients to a Dashboard:

Step-by-Step

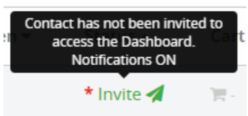
Access Contacts

Log into The MLS™ system, and click the CONTACTS menu item at the top of the page in the blue menu bar, or select My Contacts from the Contact widget located on the Member Dashboard.

Find Contact to Invite

To find a contact, you can sort by the Created date to find newly created contacts after setting up a Saved Search. Also, you can use the Search Name or Email bar located on the right side at the top of the Contacts page by entering a name or email.

Send Invite

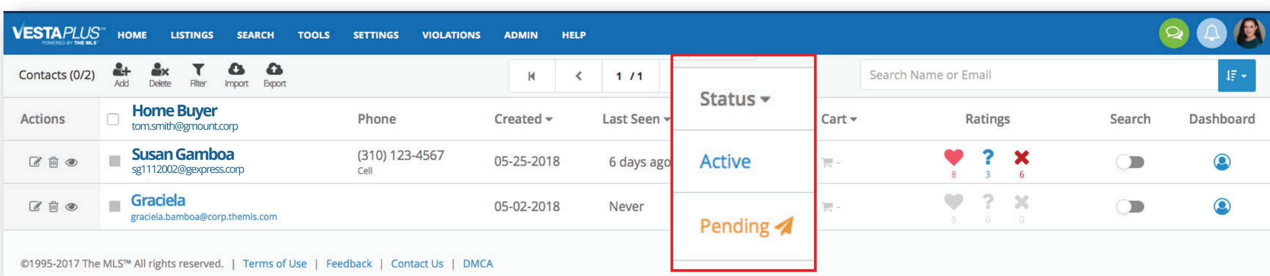


After finding the contact, click the Invite button in the Status column, and a Send Invite Confirmation window will appear letting you know the email was sent to your client.

Note: Contacts with a red asterisk to the left of Invite means that your client is receiving auto notifications.

Status Changes

After inviting your contact, his/her status will change to Pending, letting you know that an email was sent asking your client to register his/her email in the Dashboard. Once a client registers, his/her status will change to Active.

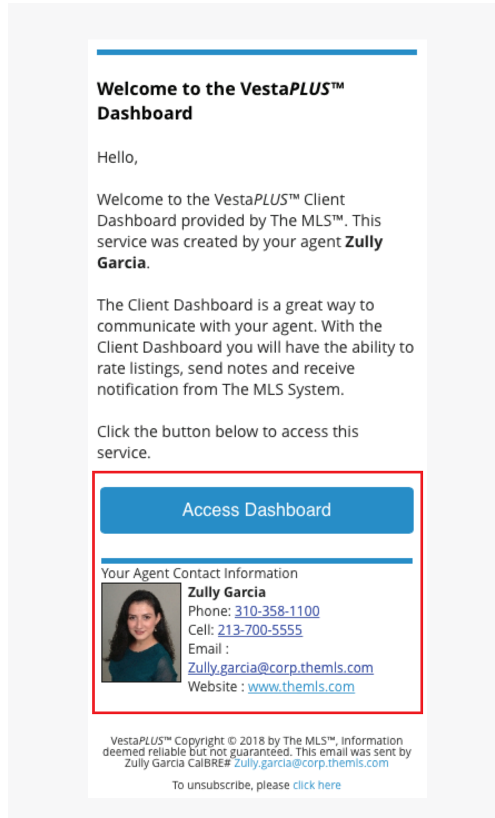


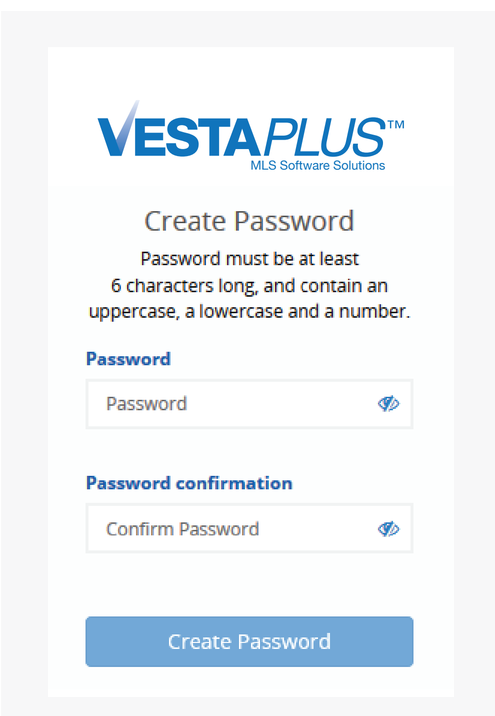
Contacts and their Current Status

Register Clients to their Dashboard:

Welcome Email

Once the invite is sent to your clients, he/she will receive a welcome email with an Access Dashboard button and your Agent Contact Information.



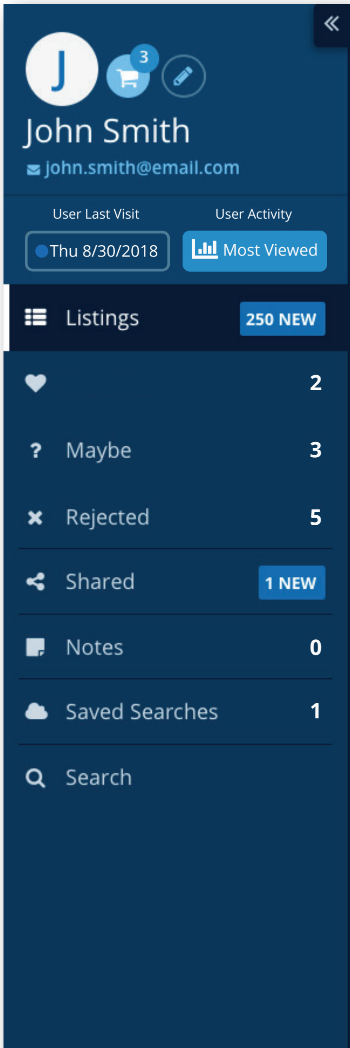


Client Registration

When the client clicks the Access Dashboard button, he/she will be taken to the Registration page where he/she will be asked to create and confirm their password. Once their password is created, they will be logged into the Dashboard and their contact status will go from Pending to Active.

Note: Clients who try accessing the dashboard from a different device will be asked to login. However, when a client receives a notification, he/she will see all the listings in the email and in the dashboard. But, if he/she wants to rate a listing and/or write a note, he/she will be required to login from the new device.

Manage my Clients' Dashboards:



Client Dashboard: Agent's View - Showing a client's dashboard.

Left Panel Navigation	
Access Contacts	Log into the MLS™ system, and click the CONTACTS menu item at the top of the page in the blue bar, or click one of the Dashboard Icons in the Contacts widget.
Find Contact	If you click the CONTACTS menu item, to find a newly created contact after setting up a Saved Search, you can sort by clicking on the Created column header. You can also use the Search Name or Email search bar located on the top right side of the Contacts page.
Click on Dashboard Icon	After finding the contact, click the icon in the Dashboard column.
Manage dashboard (left panel)	In the Client Dashboard, you can select one of the options listed on the left panel menu to manage the content of the Client Dashboard (View Cart, Edit Contact, User Last Visit, Most Viewed listings, ratings, Shared, Notes, and Saved Searches).
Manage Cart	To manage a contact's cart while in the Client Dashboard, click the icon located above the contact's name. **Tip:** From the cart, you can easily manage the cart and email listings directly from the cart into the Dashboard.
Edit Contact	To edit a contact, click on the icon located next to the cart. **Note:** Updating a client email address will require your client to authenticate their new email address for the Dashboard.
User Last Visit	Under User Last Visit, you can see the last time he/she was active on their Dashboard.

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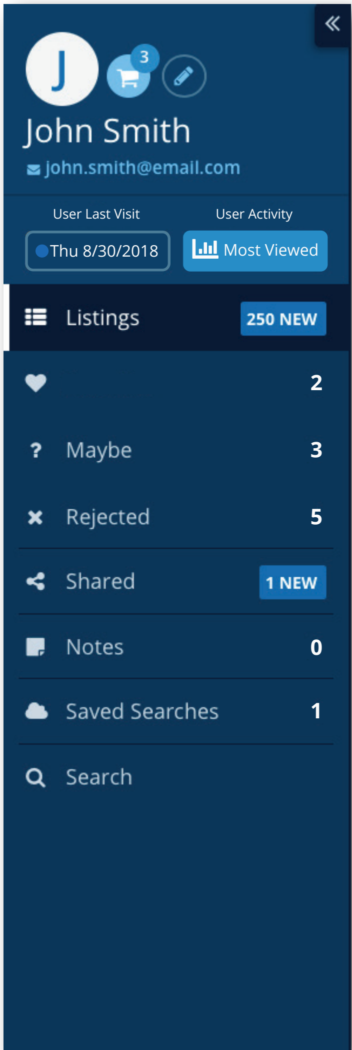
Manage my Clients' Dashboards:



Client Dashboard: Agent's View

Left Panel Navigation

Most Viewed Listings	To view your client's most viewed listings, click on the Most Viewed button located in the left panel. Most Viewed displays notes created by you or your client, all the listings your client has viewed, and rated properties. It provides agents with the Agent Showing Report with important agent remarks, showing remarks, and agent info.
Listings	The Listings view provides agents and clients all the listings that are picked up by any Saved Search associated with the primary contact's email (client's email). **Note:** Once a listing is viewed, that listing is hidden in the Listings view and requires the user to click the Show All button to see listings that have been viewed. Any rated listing will be moved out of the listings view and displayed in the ratings view.
Ratings	The rating section is broken down into three ratings: Favorites, Maybe's and Rejected listings. **Tip:** Rejected listings will no longer appear.
Notes	The Notes section keeps track of all the listings with notes. The newest notes always displayed on top. **Tip:** To reply to a note, click on the Expand Icon (arrowhead), then, click on the Reply to this Message button.
Saved Searches	Saved Searches displays all of the saved searches that are attached to the primary contact. Once in this view, you will be able to load, edit, and/or delete Saved Searches. When you click the Expand Icon (arrowhead), you will be able to see all the criteria for the Saved Search and all of the Subscribers to the Saved Search Notification.
Search (Client Search)	To provide your clients with a basic search feature, click Search. This feature provides your client with the ability to search the MLS database.
Listings to Suggest	A Suggested Only dashboard provides agents with the ability to review all of the listings that make up a Saved Search. Once this feature is enabled, you will see the "Listings to Suggest" view. In this view agents will suggest listings to their client making those listings become visible in the Dashboard. **Note:** Notifications to the client only go out once the agent has suggested a listing in the dashboard.

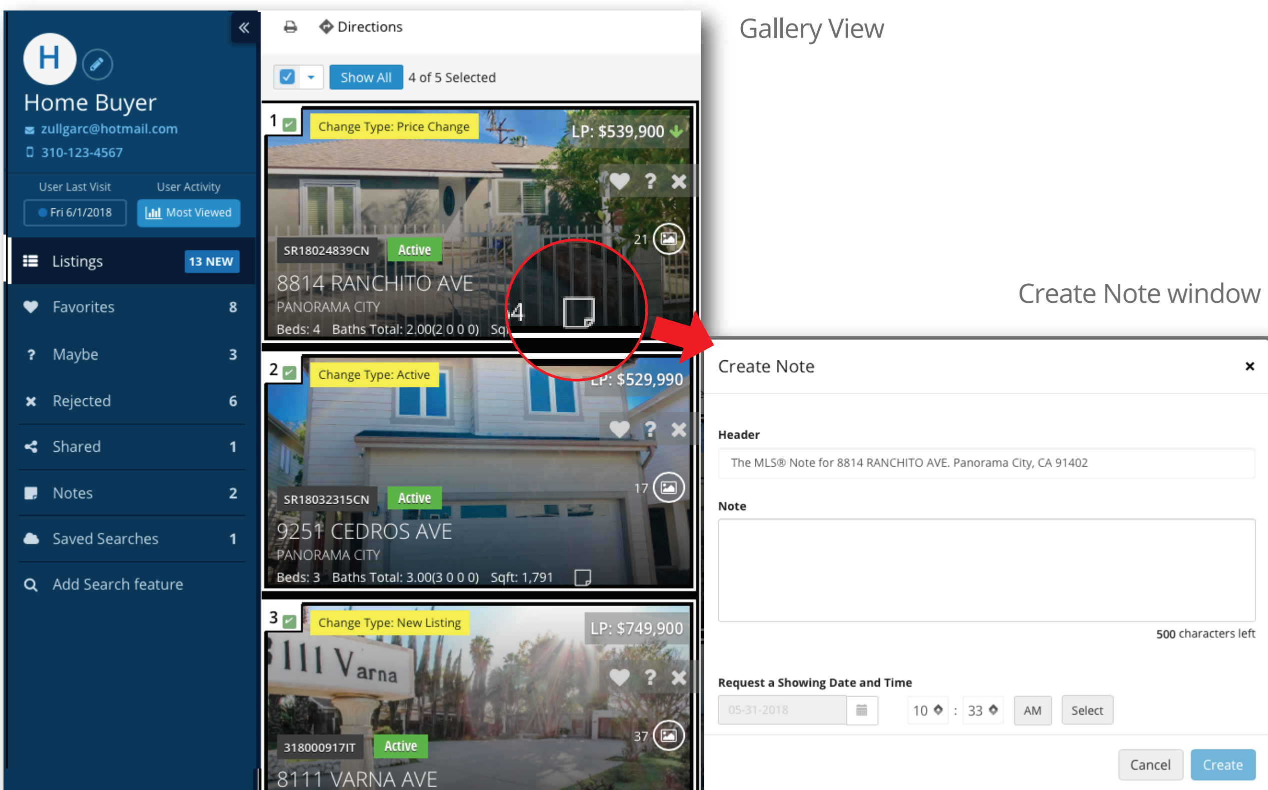
Sending Notes to Clients:

Step-by-Step

Click on the Note Icon	Once you access the Client Dashboard, click the note icon located on the Gallery View and on the Detailed View of a listing.
Send Notes	Once the Note Icon has been clicked, it will load the Create Note window, allowing for you to send a personal note about the listing to your client.
Track Notes	All notes for a client can be viewed from the Notes section of the Client dDshboard. 

Gallery View

Create Note window



Client Dashboard: Agent's View
(Click on the Note Icon in **Gallery View** to open the Create Note window.)

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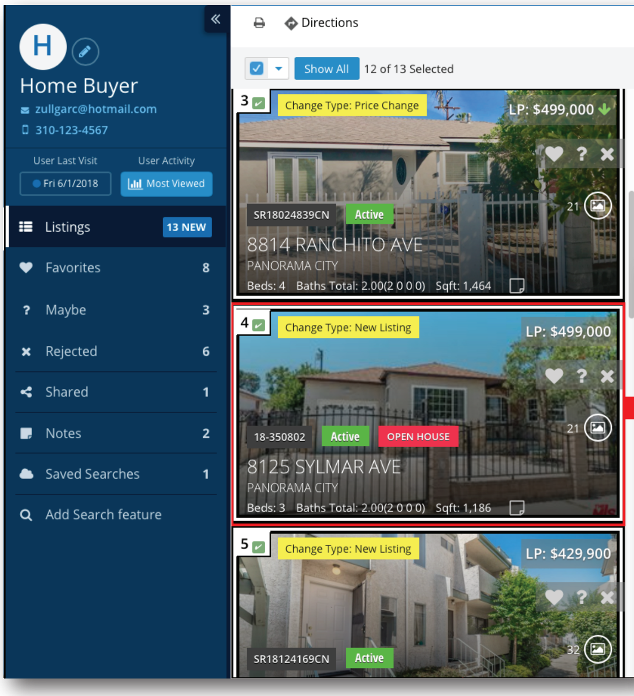
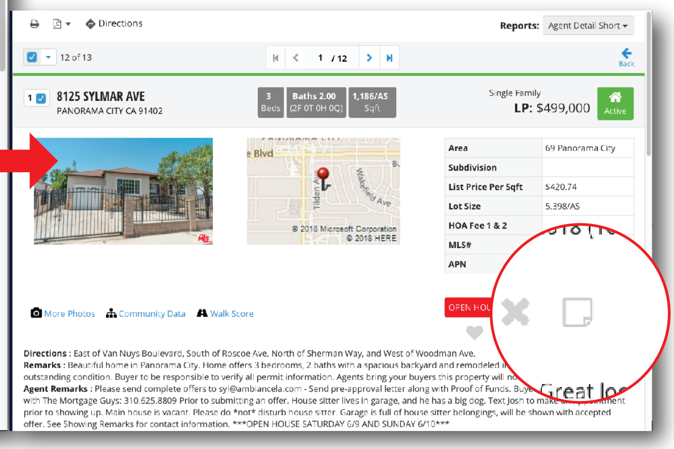
Sending Notes to Clients...Continued:

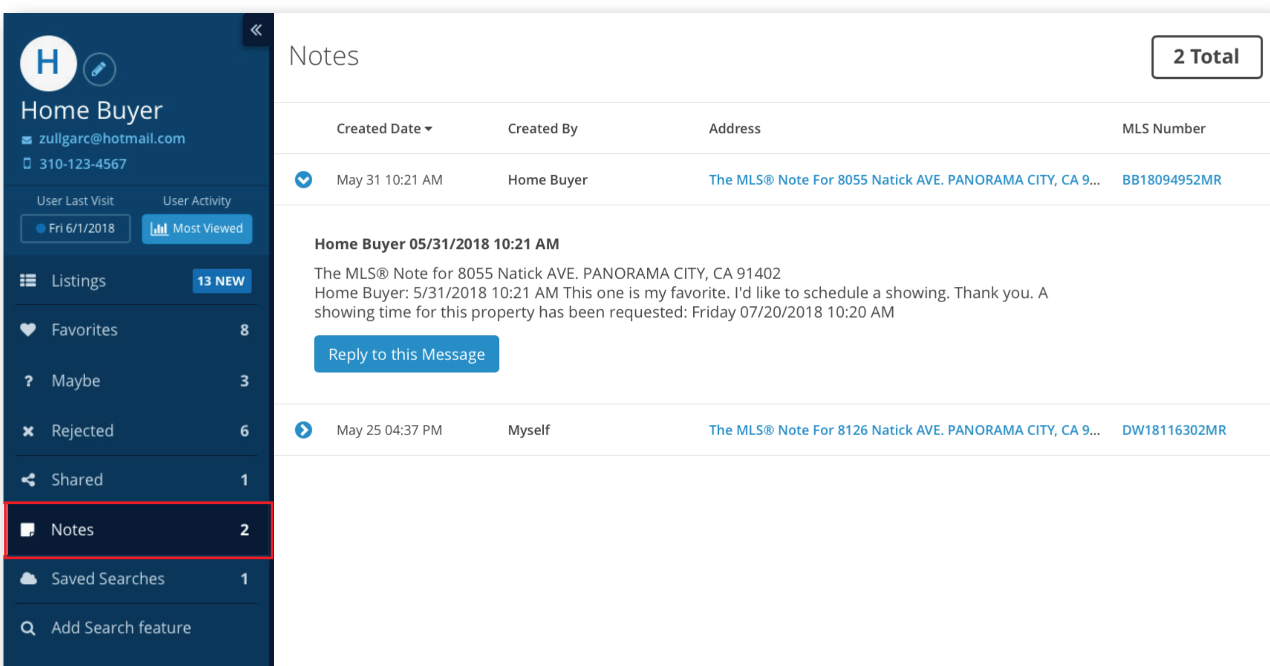


Gallery View

Detailed View



Client Dashboard: Agent's View
(The **Detailed View** of each listing can be accessed by clicking on the listing photo while in Gallery View. You can also open the Create Note window by clicking on the Note Icon in **Detailed View**.)

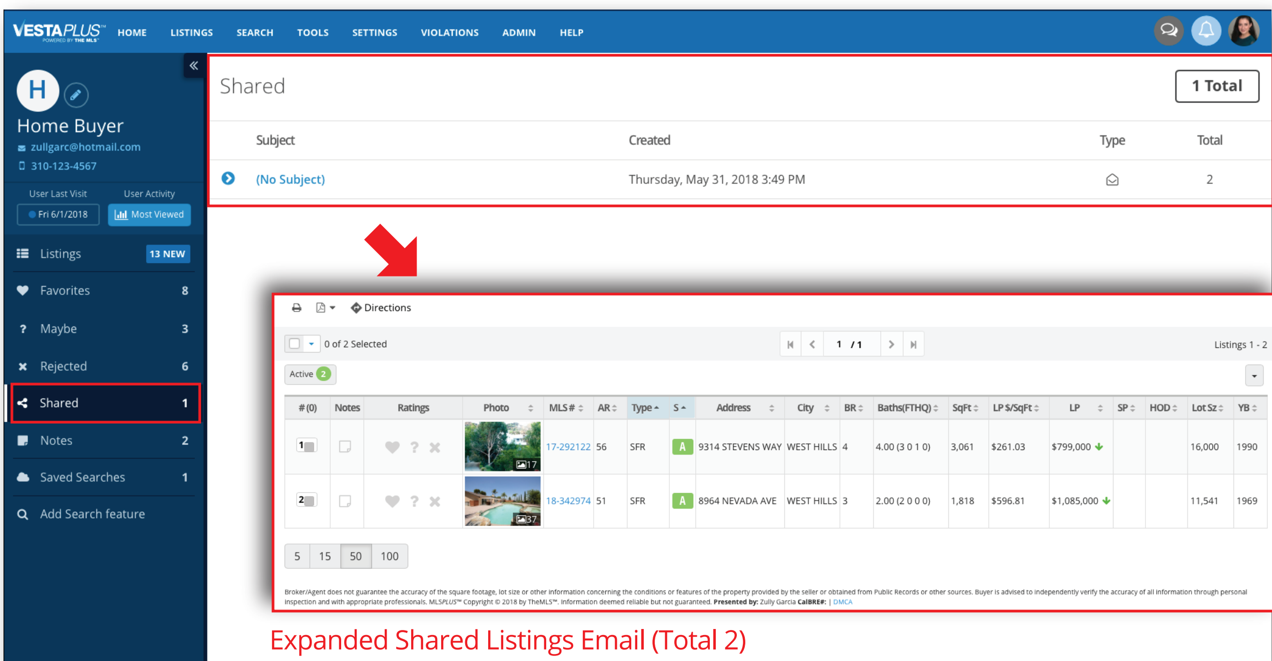


Client Dashboard: Agent's View (Access all notes received from and sent to client through the **Notes** section of the Dashboard.)

Knowing What Has Been Shared with my Client:

Step-by-Step

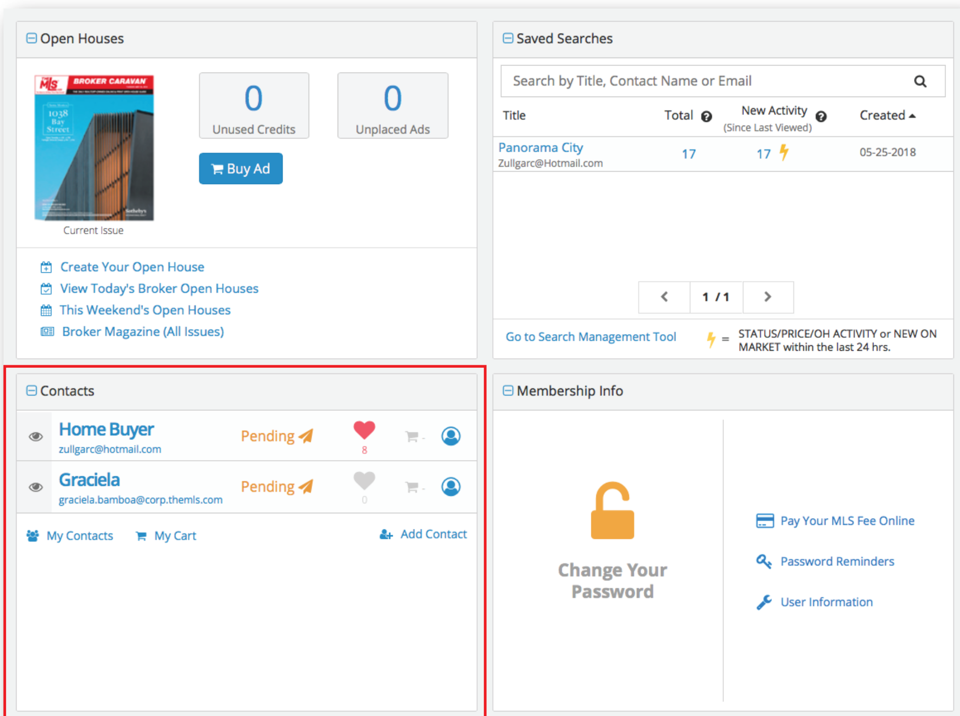
Click on Shared Button	Once you access the Client Dashboard, select the Shared section. This will load all the emails and texts you have shared with your client. 
View Sent Message	From the Shared screen, you will be able to view all messages by clicking the arrow and expanding the message.
Track emails	From the Shared screen, you can also check if your client has opened emails and accessed his/her Dashboard. 



Client Dashboard: Agent's View

Knowing What Listings my Client Rated:

Step-by-Step	
Login	Login into the MLS system, and locate the Contacts widget, then select My Contacts located in the bottom left hand corner.  My Contacts
Click on Ratings	Once the Contacts module loads you will see a column labeled Ratings. Clicking on one of the ratings icons will load the Client Dashboard displaying all of the listings your client has rated under that category.  8 3 6
Save Search	Once inside the dashboard, you can select a different category by selecting the desired rating category located in the left panel.



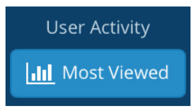
Contacts Widget

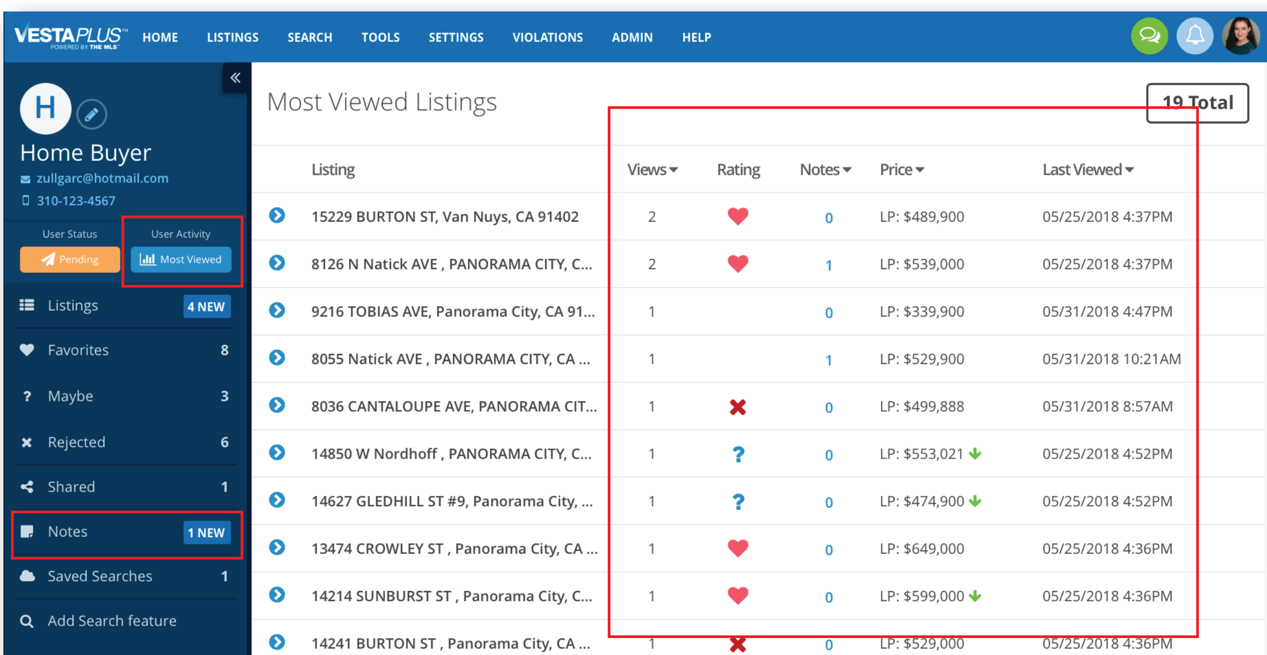
Tip

When clients rate listings, those listings are moved out of the main Listings bucket and placed in their respective categories. Listings marked as Favorites and Maybe will still receive notifications. However, Rejected listings will no longer get notifications.

Reviewing my Clients' Activity:

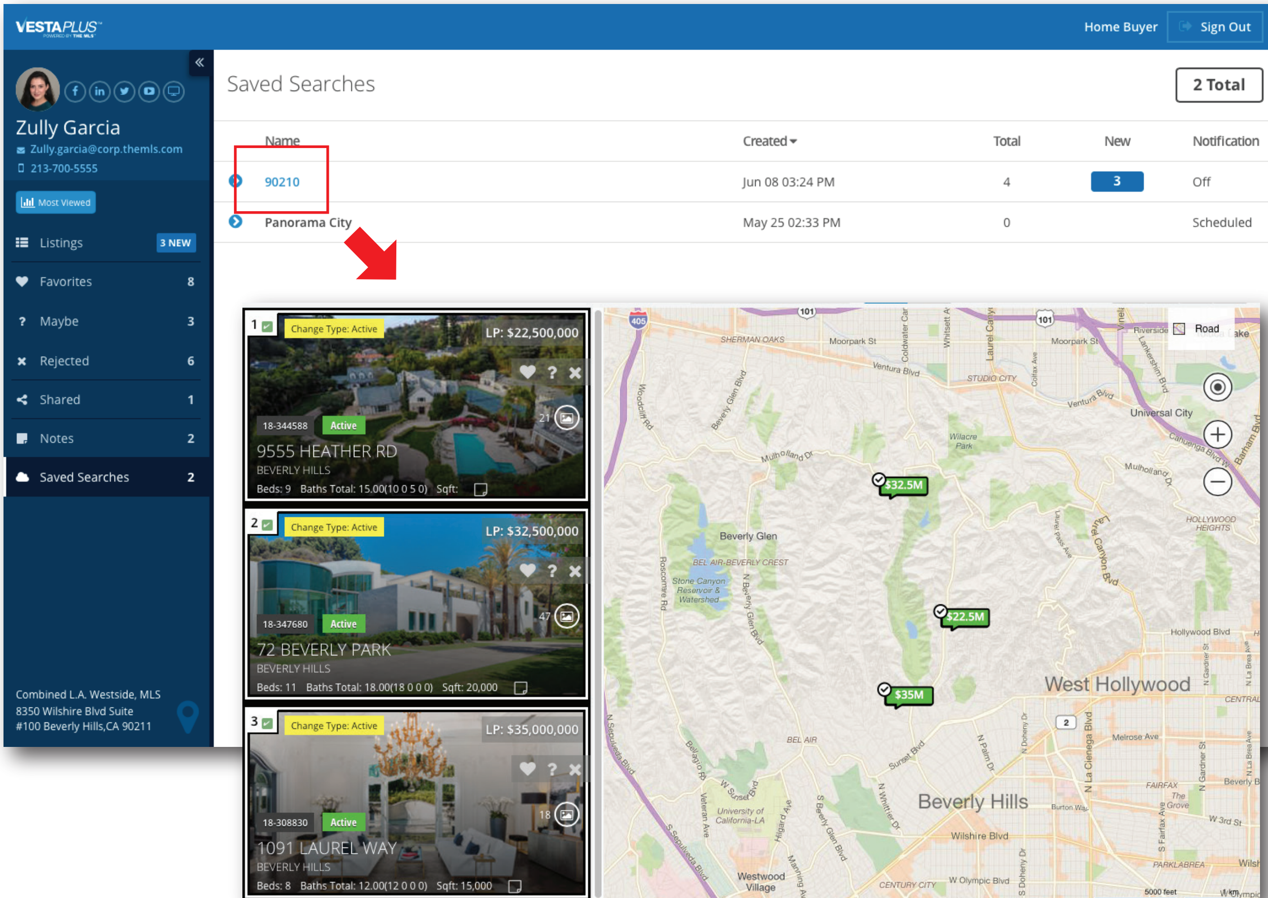
Step-by-Step

Review Clients' Activity	To review your clients' activity, navigate to your Client Dashboard through the Contacts widget or by going into the Contacts module.
Select Most Viewed	Once inside the Client Dashboard, click the Most Viewed button. This will load the activity report displaying all the listings your client has viewed, how many times they viewed each listing, and the last time they viewed the listing. In addition, you will have access to the Agent Showing Report giving you specific details about the listing your client is viewing. 
Click on Notes Count	Clicking on the Notes count in the activity report will also load up the Create Note window so that you can easily write a new note or respond to your client's notes.
Expanded View	Clicking on the Expand Icon (arrowhead) will provide the Agent Showing Report for the listing that has been viewed. In this view, agents are provided with the Agent Remarks, Showing Remarks, and agent information making it easy for the agent to contact the other agent or to get specific agent details in the Agent Remarks or Showing Remarks.



Client Dashboard: Agent's View

What is a Suggested Only Dashboard:

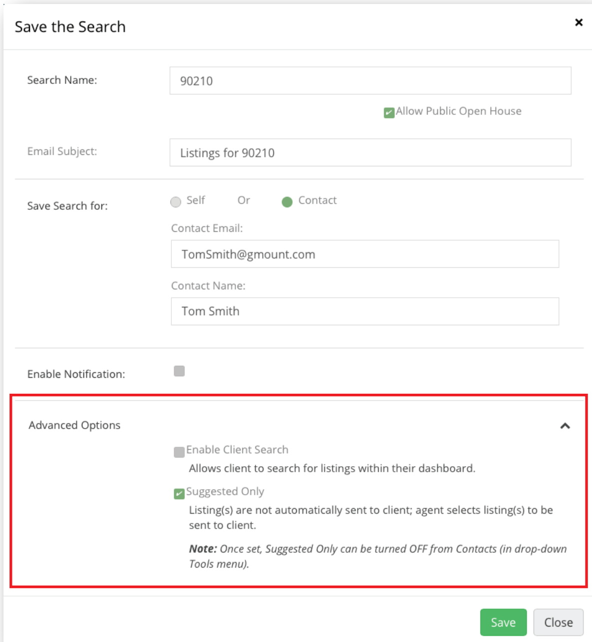


Client Dashboard: Home Buyer's View

What is it for?

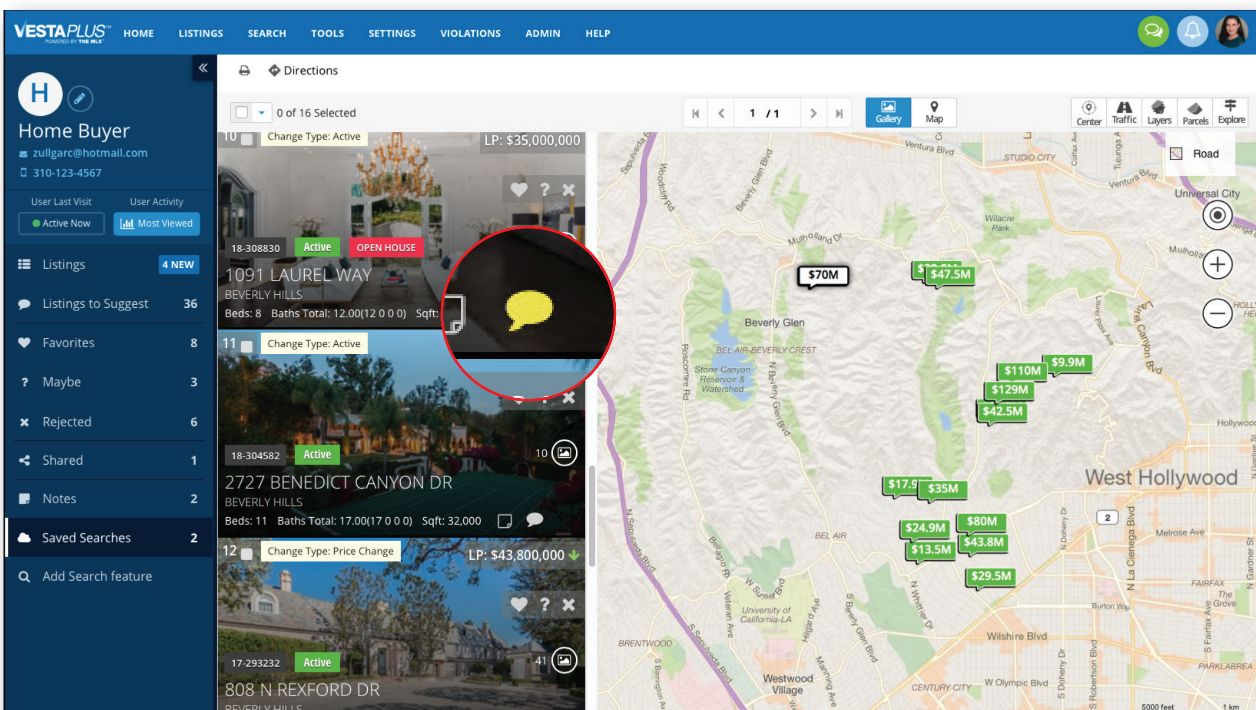
Through a Suggested Only dashboard, agents can suggest listings from a Saved Search; sending the client notifications only for suggested listings. However, as the agent, you are notified on all the listings in the Saved Search. This feature is great for hands-on agents who like to review all listings before they are sent to their client, and want to pick and choose what their clients see at any given time.

Setting Up a Suggested Only Dashboard:



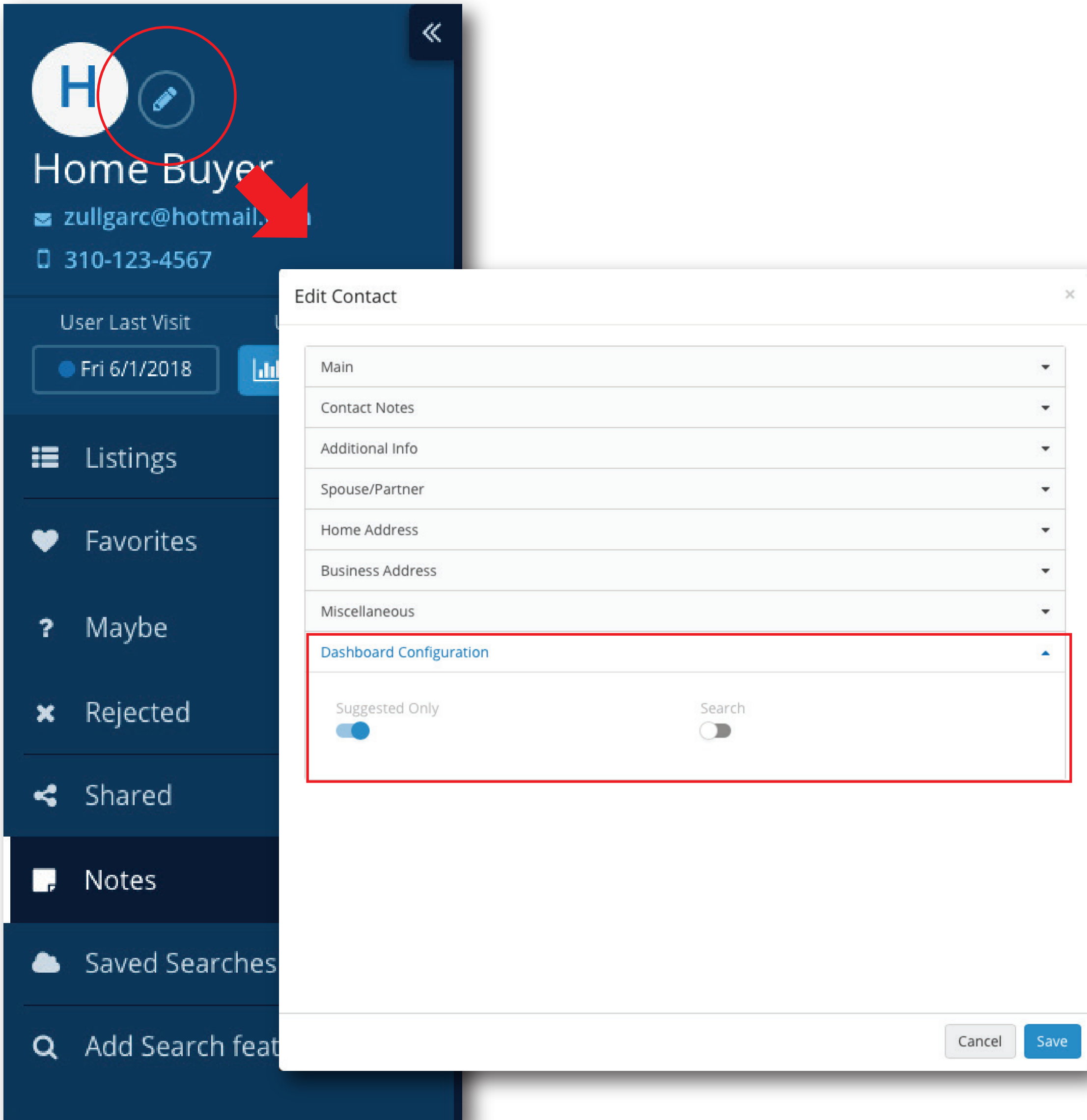
Step-by-Step

When setting up a Saved Search, look for Advanced Options at the end of the form and click on it. Check Suggested Only to avoid sending automatic listings to your client(s). Your client(s) wil only see the listings you mark as Suggested (The ones on which you, as the agent, click the Suggested bubble which turns yellow, when clicked.)



Client Dashboard: Agent’s View
(**Suggested listings** are marked with the icon)

Toggle Between Suggested Only and Search:

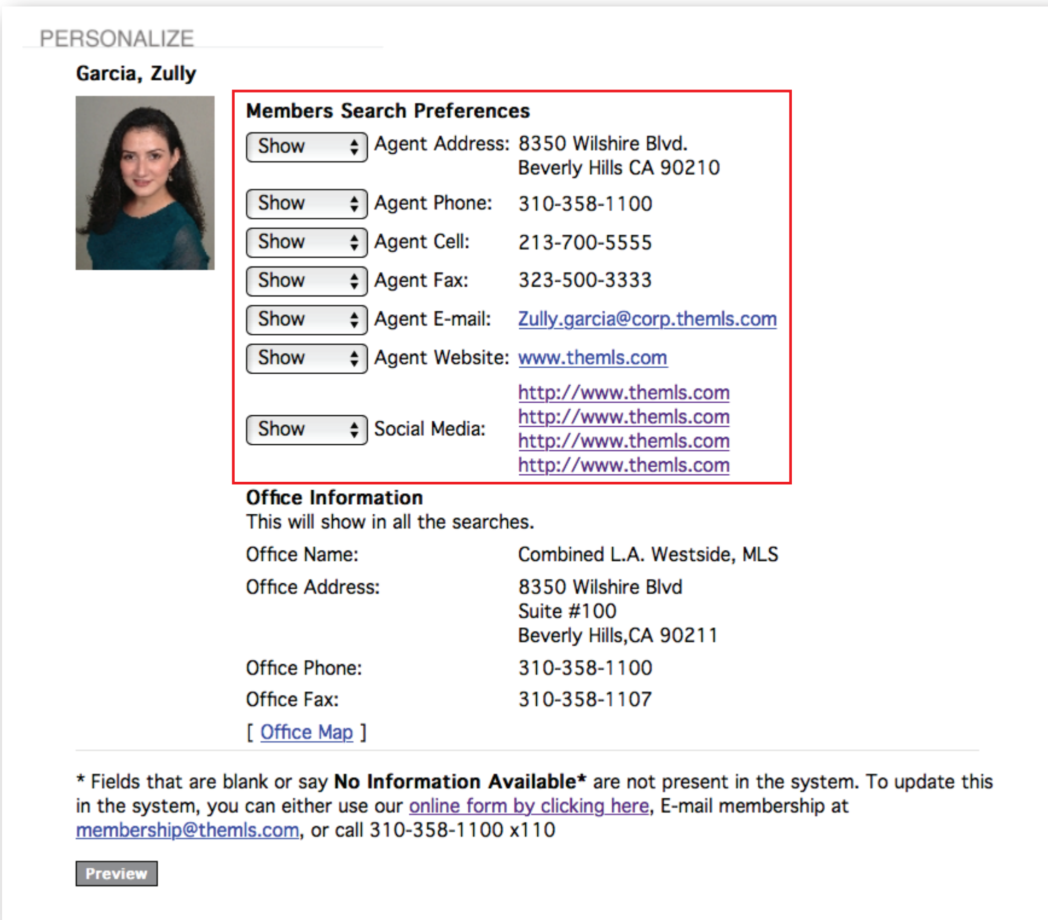


What is it for?

You've created a **Saved Search** and made sure to check the **Suggested Only** option, but now you would like to give your client access to **Search** on their own. Click on Edit Contact Icon (pencil) next to the contact's initial or photo at the top left). An Edit Contact window will appear. Then, under **Dashboard Configuration**, you can set the client up to receive Suggested Only and/or give them the option to Search any time.

Branding the Client Dashboard:

Step-by-Step	
Login	Log into The MLS™ system, click SETTINGS and select Personalize Roster from the drop down menu.
Members Search Preferences	Select which fields to show and which not to show through the Members Search Preferences.



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Questions? Call the Help Desk **(310) 358-1833**

Help Desk Hours:
Monday through Thursday 8 am - 7 pm
Friday 9 am - 7 pm
Saturday 9 am - 2 pm
Sunday 9 am - 1 pm

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