

Multiple Listing Service of Long Island

Stratus Data Systems, Inc.

# Using Stratus MLS

v 3.31

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# Getting Started

## Startup and Shutdown

You are assigned a Username (your member number) and Password that authorizes you to log in to Stratus MLS.

### Start Your Session

If you make an error when entering your Username and Password, the system prompts you to retry.

Only one user can log in with his or her log in codes. If a user is logged in to a Stratus MLS session and a second user logs in with the same codes, a pop-up message displays for the new user:

*Another user is currently signed in with the same codes. That user has been terminated to allow you to access the system.*

### End Your Session

To properly end your session, rather than using your browser's Close button, log out by clicking Log Out on the site action bar.

When you log out, the system saves your last-used column set, criteria form, and View form. In your next session, these will be used by default, and can be changed as needed. Settings changes are also saved and used by default; for example, the page size setting at results lists.

If you have more than one window open when you log out, and if your browser permits, the system logs out of your entire session and closes all open windows.

### System Timeout

The system displays a five-minute warning when your session has been inactive for twenty-five minutes. The system automatically logs you out if you take no action while it counts down to zero seconds.

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## How . . .

### *To Log In*

1. Enter **Username** and **Password**.
2. If prompted, select **New Stratus MLS**.
3. Click **Log In**.

### *To Log Out*

- At any page that displays the site action toolbar, click **Log Out**.

### *To Remain Logged In at System Timeout Warning*

- Click **Renew** while the timeout warning dialog box displays.

### *To Close Your Session at System Timeout Warning*

- Click **Log Out** while the timeout warning dialog box displays.

### *To Change Your Password*

- If prompted at Log In, change your password to prevent another person's unauthorized access with your codes.
- You may also change your password at Settings, anytime you want. See "Settings" on page 8.

## News

News items display at Info Center each day. You can choose to view news in headline or summary format To display an article, click its headline.

**Note:**

At log in, before InfoCenter opens, urgent articles may automatically display. To close the article after reading, click Close.

---

### How . . .

#### *To See News Headlines*

1. At Info Center, select the **Headlines Only** checkbox at the far right side of the day's first news item.
2. To display an article, click its headline.
3. To print the displayed article, if your browser enables this feature, right-click on the article and click **Print** at the context menu.
4. To close the article, click **Close**.

#### *To See News Summaries*

1. At Info Center, deselect the **Headlines Only** checkbox at the far right side of the day's first news item. The first lines of the article display.
2. To display the whole article, click **Read More**. At the News dialog box, to see a related web page if one is available, click **See Details**.
3. To print the displayed article, use your browser's **Print** command.
4. To close the News dialog box, click **Close**.

# Menus and Navigation

You can display the main menu as a vertical panel positioned to the left of the Stratus MLS main window, or as a horizontal bar along the top of the main window.


In addition to Main Menu commands the system offers an action bar customized for each particular page, a site toolbar displayed at all pages, navigation buttons, and a breadcrumb path.


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## How . . .

### *To View the Main Menu Two Ways*

You can choose left-side or top navigation as desired. Regardless of the menu view you choose, the same commands display.

 *The Left-Side Panel*, which displays along the left side of the system window, may be best for wide screen monitors.

 *The Top Tab Menu*, which displays along the top of the system window just below the ads, may be best for square monitors.

### *To Use the Left-Side Panel*

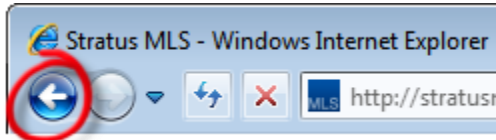
1. Click the **down arrow** at the left side of the **top menu**.
2. The **left panel** opens.
3. Click the desired submenu command under the main headings.

### *To Use the Top Menu*

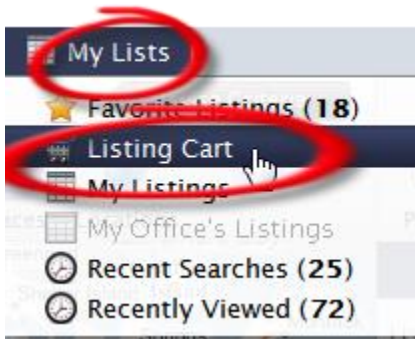
1. Click the **up arrow** at the top of the **left panel**.
2. The **top menu** opens.
3. Mouse over the desired main menu tab.
4. Move the mouse to — and then click — the desired submenu command.

**To navigate the system**

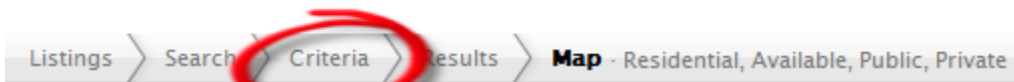
Using the Browser Back button, click to go back one page.



Using the Main and submenu commands, click a main menu command then one of the submenu commands that display below it.



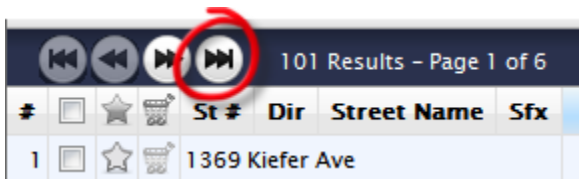
Using the Breadcrumb path, click any segment to open the associated feature.



Using the Action toolbar, click an action appropriate for the displayed page.



Using navigation buttons when provided, click arrows to move through pages.



***To Fill the Entire Screen with the Browser Window***

- Click your browser's maximize-window button. This button is available if the browser window is not already maximized.

Browser menus and toolbars continue to display and take up some room at the top of the window. To fill the entire screen with Stratus MLS, see below.

***To Fill the Entire Screen with the Stratus MLS Window***

By expanding the browser window so that it fills your entire screen, you maximize the viewing space and minimize the need to scroll.

1. Press F11 to expand the system window (or follow instruction for your computer and browser).
2. To return to normal browser display, press F11 again.

***Note:***

Browser menus and toolbars disappear when the system window takes up the whole screen.

# Settings

Choose Settings on the main menu to customize your Stratus MLS experience. You can manage a Profile, your Agent Photo, Market Areas for “Today’s Listings” on page 28, the Appearance of the Stratus MLS window, your Password; and default text for “Send Listings” on page 224.

**Note:**

When you make a change at any Settings tab, the page’s Save button becomes available; clicking it saves changes at *all* Settings tabs. If text at any unsaved Settings tab is invalid, an alert displays when you save. When all Settings have been properly saved, a confirmation displays.

### **To Manage Your Profile**

1. At the main menu, click **Settings**.
2. Click the **Profile** tab.
3. Add or change your preferred **Email** address, as well as your **website url** in the following format: **http://www.yourdomain.com**
4. If you share listings with another agent whose name should appear next to your own in the headers and footers of listing detail printouts, select a name from the **2nd Agent** dropdown list. To remove the name, click **Remove**.
5. Click **Save**.

### **To Manage Your Agent Photo**

For best results use a photo in Portrait orientation. The system will size it appropriately.

1. At the main menu, click **Settings**.
2. Click the **Agent Photo** tab.
3. At **Upload a Photo**, click **Choose File**.
4. Navigate to the photo on your computer, and after selecting it, click your browser’s **Open** button.
5. The uploaded photo displays; to replace the photo, repeat steps 3-4.
6. Click **Save**.



**Note:**

To delete the uploaded photo, select the **Delete Agent Photo checkbox**, then click **Save**.

**To Manage “My Links” at Info Center**

For convenient access while working in Stratus MLS, the system allows you to set four personal links at Info Center. Enter the URL and a display name for each of four web sites to display at the “My Links” section in “About Info Center” on page 26 “About Info Center” on page 26 “About Info Center” on page 26.

1. At the main menu, click **Settings**.
2. Click the **My Links** tab.
3. At the Link 1 **URL** field, type the first website url in the following format:  
**http://www.domain.com.**
4. At the Link 1 **Web Site Display Name** field, type the name of the website as you want it to appear in Info Center.
5. Repeat steps 3-4 for up to four links.
6. Click **Save**.

**To Manage Your Market Areas**

1. At the main menu, click **Settings**.
2. Click the **Market Areas** tab.
3. At **Market Area 1**, enter a name for the market area.
4. At **Select Class(es)**, select one or more classes.
5. At **Select Town(s)**, click to select a from the dropdown list, or CTRL+Click to select more than one.
6. To confirm towns selected, click **Show Selected**.
7. To define more market areas, scroll down. Repeat steps 3 through 5 as needed for each.
8. At **Calendar**, to cause open houses to display as calendar events, select which type of open houses you want your calendar to show in your Market Areas: **Broker Open Houses** and/or **Consumer Open Houses**. To exclude open houses from your calendar altogether, clear both checkboxes.
9. Click **Save**.

### ***To Manage the Appearance of Stratus MLS Screens***

1. At the main menu, click **Settings**.
2. Click the **Appearance** tab.
3. At **Theme**, choose a theme from the dropdown list to change the window's color scheme.
4. At **Number of results per page at search results list**, from the dropdown list, select the number of search results you want displayed by default at List pages. Note: You can override this default setting at any List page during any Stratus MLS session, but when you start a new session the default you define at Settings is restored.
5. At **Column Set for listing search results lists**, choose a column set from the dropdown list.
6. Click **Save**.
7. Click **OK** at "Your settings have been saved."

### ***To Manage Your Stratus MLS Password***

Password requirements display on the Password tab. It may take up to two minutes for the system to change your password after you save Settings. Allow up to forty-eight hours for ancillary websites to accept your new password.

1. At the main menu, click **Settings**.
2. Click the **Password** tab.
3. At **Current Password**, enter your current password.
4. Review displayed password requirements. To see MLS password policies, click **MLS's Password Tips & Policy**.
5. At **New Password**, enter a new password that conforms to requirements.
6. Note the password strength, and confirm the password when you have a strong one.
7. At **Confirm New Password**, type the new password again; it must match the password entered at step 4.
8. Click **Save**.

### ***To Manage "Send Listings" Text***

Enter text for your own personal default Subject, Body, and Signature text. These are used when you send listings from search results. If you leave these fields blank at Settings, the MLS default text is used.

1. At the main menu, click **Settings**.
2. Click the **Send Listings** tab.
3. At **Default Email Subject**, clear text as necessary and enter a subject for your Send Listings email.
4. At **Default Email Body and Signature**, clear text as necessary and enter a message, closing, and signature line for your Send Listings email. Format the message as needed. See “Formatting Email” on page 226.
5. Click **Save**.

## About Site Actions

The system's site action bar, at the top of the Stratus MLS window, provides actions that can be applied at most pages. Depending on the page, additional actions display.

- Click **Help ?** for information about all of the current page's features and actions.
- Click **Print** to print the current page.
- Click **Send** to email a link to particular listings; for example, the contents of the listing cart, or selected listings at any results list.
- Click **Download** to download listings or public records, detail views, photos, and public records.
- Click **New Window** to open multiple system windows for multi-tasking.
- Click **Log Out** to end your session.
- Click **List** to view search results in a list.
- Click **Map** to view search results on the map, or start a map search.
- Click **View** to view a display details page in your selection of detail forms.
- Click **Results** to view search results.

# Print

At List, View, Map and other pages, the system offers the site action Print, which opens the Print Options Dialog. Before printing takes place, the system prepares pages to print in PDF format.

To print at a dialog box (for example, Photos, Statistics, Driving Directions, Contacts) click the Print tool in the upper right corner, next to the dialog box's Close icon.

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## How . . .

### *To Print at List*

1. Display results at **List** or another page that lists search results.
2. Optionally change the default **column set**.
3. Select properties you want to print.
4. Click **Print** on the site action bar.
5. At the **Print Options** dialog box, select **List Rows** or **Detail Views**.
6. For **List Rows**, use the dropdown lists to choose what you want to print, and a column set . For **Detail Views**, use the dropdown lists to choose what you want to print.
7. To preview the page(s) as they will print, click **Print Preview**. The preview opens in a new window, which you must close before printing.
8. Listings may print immediately, or a browser dialog box may display. Choose landscape mode when printing a list.

### *To Print at View*

1. Display selected results at View.
2. Optionally change the default **Form**.
3. Use navigation arrows to change your selections, if needed.
4. Click **Print** on the Site action bar.
5. At the **Print Options** dialog box, select **List Rows** or **Detail Views**.
6. For **Detail Views**, use the dropdown lists to choose what you want to print, and a detail form. For **List Rows**, use the dropdown lists to choose what you want to print.

7. To preview the page(s) as they will print, click **Print Preview**. The preview opens in a new window, which you must close before printing.
8. To print the pages, click the site action **Print**.
9. Listings may print immediately, or a browser dialog box may display. Choose landscape mode when printing a list, and at the photos viewer.

### **To Print Driving Directions**

1. Display driving directions at List, View, or Map. See “Driving Directions Dialog.”
2. At the **Driving Directions dialog**, click the **Print** tool in the upper right corner, next to the dialog box’s Close icon.
3. At the **Print Options** dialog box, select or clear one or more options:

**Map:** Print the mapped route with optional round trip, reference # markers, intermediate destinations, and the distance at each destination.

**Directions:** Print turn-by-turn directions in text with distance notations and reference numbers.

**Detail Views:** Print the detail views in the format you select from the Detail Form dropdown list.

4. To print the pages, click the **Print** button.
5. Directions may print immediately, or a browser dialog box may display.

### **To Print Contact Records**

1. Select one or more contacts at the contacts List or View page.
2. Click **Print**.
3. At the Print dialog box, to print rows, select **List Rows**; or to print each record, select **Detail Views**.
4. At **For**, to print the displayed record (if any), select **The Current Contact**; to print all records in List, select **All X Contacts**; or to print currently selected records, select **X Selected Contacts**.
5. At **Column Set**, applicable only to List Rows, select the desired column set format.
6. At **Form**, applicable only to Detail Views, select the desired form.
7. Click **Print**. Contact records may print immediately, or a browser dialog box may display.

### ***To Print Contact Labels***

1. Select one or more contacts at the contacts List or View page.
2. Click **Print**.
3. At the Print dialog box, select **Detail Views**.
4. At **For**, to print labels for the displayed record (if any), select **The Current Contact**; to print labels for all records in List, select **All X Contacts**; or to print labels for currently selected records, select **X Selected Contacts**.
5. At **Form**, select the Avery label you want.
6. At **Replace Contact's Name With**, enter a different name to display on the labels, if needed. Note: The replacement name (for example, My Neighbor or Recipient) appears on *all* the labels.
7. Click **Print Preview**; confirm that the labels appear as you want them.
8. Click **Print**. Labels may print immediately, or a browser dialog box may display.

### ***To Print Member or Office Records at Contacts***

1. Select one or more roster records at the contacts List or View page.
2. Click **Print**.
3. At the Print dialog box, select **List Rows** to print rows, or **Detail Views** to print each record.
4. At **For**, to print the displayed record, select **The Current Contact**; to print all listed records, select **All X Contacts**; or to print the currently selected records, select **X Selected Contacts**.
5. At **Column Set**, applicable only to List Rows, select the desired column set format.
6. Click **Print**. Roster records may print immediately, or a browser dialog box may display.

### ***To Print Public Record Labels***

1. Select one or more public records at the List or View page. (See “About Public Records Searches” on page 128.)
2. Click **Print**.
3. At the Print dialog box, select **Detail Views**.
4. At **For**, to print labels for the displayed record (if any), select **The Current Contact**; to print labels for all records in List, select **All X Contacts**; or to print labels for currently selected records, select **X Selected Contacts**.
5. At **Form**, select the Avery label you want.

6. At **Replace Owner's Name With**, enter a different name to display on the labels, if needed. Note: The replacement name (for example, "My Neighbor", "Recipient") appears on *all* the labels.
7. Click **Print Preview**; confirm that the labels appear as you want them.
8. Click **Print**. Labels may print immediately, or a browser dialog box may display.



## Download

Use the Download site action in order to store items on your PC for use outside Stratus MLS. You can download listings at List and View, public records at List and View and at the criteria page for “Run a Public Records Bulk Download” on page 154, contacts and cma’s. The system downloads files in .pdf format.

### *To Download Listings or Public Records at View*

1. Select one or more property detail views on the navigation bar.
2. Click **Download** at the site action bar.
3. At the **Download** dialog box, choose what you want to download: **List Rows**, **Detail Views**, or **Photos**.
4. For **List Rows**, choose what you want to download at the **For** dropdown list. Then choose a **Column Set** from the dropdown list. To include column names as the first row, select the checkbox for that option.
5. For **Detail Views**, choose what you want to download at the **For** dropdown list. Then choose a **Form** from the dropdown list.
6. For **Photos**, choose what you want to download at the **For** dropdown list.
7. Click **Download** to start the packaging process.
8. At the **Download Ready** dialog box, click **Download**.
9. At the **File Download** dialog box, choose to **Open** or **Save** the .pdf file. When saving, choose a folder in which to store the downloaded .pdf file.

#### **Note:**

When you click the Download site action at the Criteria or Map pages for a public records search, the Bulk Download dialog box opens. Bulk records are downloaded before the search is submitted. This feature is unique to public records. See “Public Records Bulk Download Dialog”.

### *To Download Personal Contacts*

1. Select one or more personal contacts at the contacts List or View page.
2. Click **Download**.
3. At the Download dialog box, to download rows, select **List Rows**; or to download contact records, select **Detail Views**.

4. At **For**, to download the displayed personal contact (if any), select **The Current Contact**; to download all contacts, select **All X Contacts**; or to download currently selected contacts, select **X Selected Contacts**.
5. At **Column Set**, applicable only to List Rows, select the desired column set format: “Outlook or Windows Live Mail” or “All Downloadable Fields”.
6. At **Include column names as first row**, applicable only to List Rows, select the checkbox if you want to include headings. Note: You cannot clear this checkbox when downloading contacts for Outlook or Windows Live Mail, which require headings.
7. At **Form**, applicable only to Detail Views, select the desired form.
8. Click **Download**.
9. At the Ready prompt, click **Download** again, then complete information in your browser’s dialog box as needed.

#### ***To Download Personal Contact Labels***

1. Select one or more personal contacts at the contacts List or View page.
2. Click **Download**.
3. At the Download dialog box, select **Detail Views**.
4. At **For**, to download a label for the displayed record (if any), select **The Current Contact**; to download labels for all contacts in List, select **All X Contacts**; or to download labels for currently selected contacts, select **X Selected Contacts**.
5. At **Form**, select the desired Avery form.
6. At **Replace Contact’s Name With**, enter a different name to display on the labels, if needed. Note: The replacement name (for example, My Neighbor or Recipient) appears on *all* the labels.
7. Click **Download**.
8. At the Ready prompt, click **Download** again, then complete information in your browser’s dialog box as needed.

#### ***To Download CMA’s***

1. Click **Download** on the action bar, after selecting a CMA at the list or at the open CMA.
2. At the Download Ready dialog box, choose what you would like to download (current section or entire CMA).
3. Click **Download**.

**To Download Public Record Labels**

1. Select one or more public records at the List or View page. (See “About Public Records Searches” on page 128.)
2. Click **Download**.
3. At the Download dialog box, select **Detail Views**.
4. At **For**, to download labels for the displayed record (if any), select **The Current Property**; to print labels for all records in List, select **All X Public Records**; or to print labels for currently selected records, select **X Selected Public Records**.
5. At **Form**, select the Avery label you want.
6. At **Replace Owner’s Name With**, enter a different name to display on the labels, if needed. Note: The replacement name (for example, “My Neighbor”, “Recipient”) appears on *all* the labels.
7. Click **Download**. Labels may print immediately, or a browser dialog box may display.
8. At the Ready prompt, click **Download** again, then complete information in your browser’s dialog box as needed.

## New Window

Use the New Window site action in order to open one or more new system windows. This allows you to perform more than one system activity without losing your place when, for example, you are interrupted by a phone call and taken off task.

To open a new system window, click **New Window** on the site action bar. You can perform any action in the new window, and may open as many new windows as you want.

Depending on your browser, the new window will open either as another tab, or as another instance of the browser.

While you are active in any system window, your session remains active and will not time out. If all windows have been inactive for twenty-five minutes, the standard timeout warning displays, and the session ends in all windows unless renewed.

If you log out at any open system window, you may be presented with the option to log out of your session and close all windows, or leave all remaining windows open. If you use a browser that doesn't allow you to browse more than one window at a time, click the browser's Close button to close each one.

## Get Help

If you have questions as you use the system, Help is a click away. Help is organized so you can search topics for any key word, read it like a book, select a topic by index, or go to page-specific information by clicking ? from the site action bar.

---

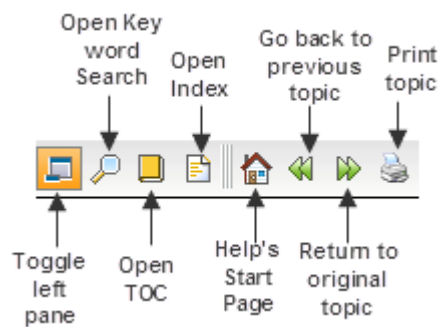
### How . . .

#### *To Open Help*

At the site action bar, click **Help** to open the Stratus MLS help system.

#### *To Use Help's Toolbar*

Choose a help tool for the following actions:

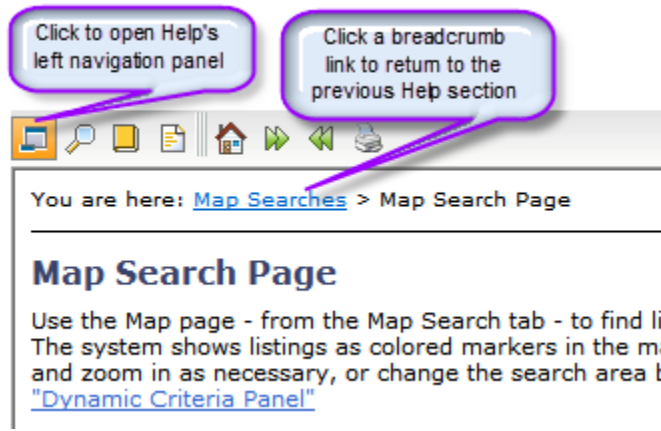


#### *To Get Help For the Current Page*

- Click **Help** at the top right corner of the open page to see the related topic in the Help window.
- Use your browser's **Close** button to close the Help window.

#### *To Show Help's Left Navigation Panel & Breadcrumb Navigation*

When the left navigation panel is closed, the help topic displays in the entire help window.



***To Open or Close the Left Navigation Panel***

When the left navigation panel is open, the help topic displays in the help window's right panel.

The screenshot shows a search interface with a search bar at the top, a ranked list of results, and a right-hand panel with detailed information. Callouts provide instructions on how to use these features.

**Search**

zoom

You are here: [Map Searches](#) > [Map Search Page](#)

Rank	Title
1	Map Search Page
2	Criteria - Map Format
3	Mapped Results
4	Driving Directions
5	Dynamic Criteria Panel
6	Send Dialog
7	Criteria Page
8	Map Searches
9	Map Search Tab
10	Locations Dialog
11	Results Page
12	Detail View Page
13	Mapped Listings
14	Driving Directions Dialog

TOC

Index

**Map Search Page**

Use the Map page - from the Map Search tab - to display listings on a map. When the map page opens, your map area displays in the map frame. The system displays listings as colored markers in the map frame and a list format below the map. If no listing markers are displayed, drag the map and zoom in as necessary, or change the search area by drawing a polygon or radius. Adjust if needed, at the Dynamic Criteria Panel. [See "Dynamic Criteria Panel"](#)

You can display the map in Road, Aerial, and Bird views. You can move the map frame, zoom in or out with the mouse wheel or zoom controls, and draw a polygon around a search area. You can save the search area for later use, clear the shape, choose a saved shape from a dropdown list, display Places (points of interest), or address Locations.

The color of the listing marker indicates the listing type. When listings are very close to one another, they may overlap. To display the listing details pop-up over the marker, click the listing details pop-up icon. To view a legend identifying marker colors, click "Legend".

To see a larger portion of the map, hide the listing list. Click the "hide" down arrow at the list's right corner in the navigation bar.

**Callouts:**

- To search for a key word, as in Google, type it in the Search field, then click Search. A ranked list of help topics displays below; the list may include unwanted topics.
- Close left navigation panel
- Click the topic you want
- Open Help's Table Of Contents
- The Index is linked only to topics relevant to your index key word.

At the bottom left side of any Help window, notice three accordion-style buttons:

- **TOC:** Click this button to open the Table of Contents. Each subject heading is identified by a book icon. Double-click on a book to reveal the pages (topics). Click the page for Help on that topic. Help topics display in the right panel. Click again on the book to retract the pages.
- **Index:** Click this button to open the Index. This is an alphabetical list of Help topics that match index key words. When you enter a keyword in the text box at the top of the index panel, the system highlights matching words or phrases. Click on a word or phrase to view the Help topic. If more than one topic is assigned the same key word, click the appropriate TOC topic from the displayed list. View the Help topic in the right panel.

- **Search:** Click this button to use the full text search. Type a keyword or words into the text box. Click the Search button. The system finds topics containing your search text, and ranks them by relevance. Click a topic to display in the right panel.

### ***To Print a Help Topic***



1. Display the desired topic.
2. Click the **print tool** in Help's toolbar.
3. At the **Print** dialog box, click **Print**.

### ***To Use Links in Help Topics***

Help topics offer links just as web pages do.

- **Inline links** let you jump to another topic or to a place within the same topic. Links show as underlined text in blue or purple. Click on the link to display the linked text.
- **See Also links** are located at the end of many Help topics. Click to open the desired topic in a new topic window.
- **links**, below each procedure, let you jump to the top of the Help topic.

### ***To View the Previously Displayed Topic***

1. To show the previously displayed topic, click the **Back** tool .
2. To return to the original topic, click the **Forward** tool .

### ***To Get Help in PDF Format***

PDF versions of Help are available for printing or viewing as a book or in individual chapters. You must have Adobe Acrobat Reader installed on your computer in order to view and/or download a PDF file.

1. At the bottom of any topic, click **Get Documentation in PDF Format**.
2. Click the **chapter** (book) you want to open or download.
3. Once open, you can view, print, and save the file.



# Info Center

## About Info Center

Info Center is your Stratus MLS dashboard, where you can see current news, today's listings, alerts, and informative links to web sites and media.

### News

In the left column, News headlines or summaries display each day. (See "News" on page 4.)

### Today's Listings

In the middle column, Today's Listings display the current listing activity in your market areas. (See "Today's Listings" on page 28).

### Alerts

Under Today's Listings, linked Alerts display when the system finds listings for open houses (if you've chosen this Market Area setting), prospect searches, expiring prospects, and expiring CMAs. Member surveys and other board and MLS alerts may also appear. To manage or open more information about an alert, click its link.

### Links

In the right column, quick links to targeted Stratus MLS functions display, as well as other important links relevant to MLSLI members.

A keyword search tool, available at the bottom of Links, works like a Google search and allows quick document lookup. Enter a keyword and then click Go.

### My Links

Under Today's Listings and Alerts, links display for up to four websites you have selected at Settings.

## News

News items display at Info Center each day. You can choose to view news in headline or summary format. To display an article, click its headline.

**Note:**

At log in, before InfoCenter opens, urgent articles may automatically display. To close the article after reading, click **Close**.

---

## How . . .

### *To See News Headlines*

1. At Info Center, select the **Headlines Only** checkbox at the far right side of the day's first news item.
2. To display an article, click its headline.
3. To print the displayed article, if your browser enables this feature, right-click on the article and click **Print** at the context menu.
4. To close the article, click **Close**.

### *To See News Summaries*

1. At Info Center, deselect the **Headlines Only** checkbox at the far right side of the day's first news item. The first lines of the article display.
2. To display the whole article, click **Read More**. At the News dialog box, to see a related web page if one is available, click **See Details**.
3. To print the displayed article, use your browser's **Print** command.
4. To close the News dialog box, click **Close**.

## Today's Listings

Stratus MLS highlights today's listing activity in up to four market areas. You specify the property classes and location at "Settings" on page 8, and Stratus MLS displays links to new and updated listings for that day (or your chosen number of days) at Info Center and the New Search page. To see the list of properties in a market area and category, click the desired count.

### *To View Today's Listings*

1. Click **Info Center** at the Main Menu.
2. At **Today's Listings**, to see new listings for a particular market area click a market area's **new** link; to see changed listings click the **update** link.
3. If a results list displays more than one match, double click a listing to see it at View.
4. To return to results click **List**.

# Links

At the main menu, use the Links submenu to locate resources and to look up particular MLS documents and web pages via keyword.

## ***Selecting a Link Option***

Click any Link submenu item to open the corresponding document or site in a new window.

## ***Searching By Keyword***

Enter a search keyword or words, as you would in a Google search, and then click Go to display MLSLI's document matches in a new window.



# Add and Edit Listings

## About Add/Edit Listing

Use Add/Edit to add and maintain public and private listings of all classes.

Listings are linked to the property's public record. When you establish this link before starting data entry, the system can auto-fill many of the fields describing property characteristics, link to the public record from the listing detail form, and link to the listing from the public record detail form.

To create the link, you must locate the appropriate public record using the Link Listing to Public Record search. Once linked, the listing detail edit form displays; here you enter listing details, upload photos and attachments, and change the map location if necessary.

### Add Listing

Use the Add Listing tab to begin adding a public or private listing and link to its public record. As you add information at the listing detail edit form, the system auto-saves the listing as a draft. If you can't complete the draft in one session, plan to do so quickly; check MLS restrictions on the number of days that drafts remain available. Once you complete all required information and either upload or order a photo, the system assigns an MLS# and stores the listing in the MLS listing database.

### Edit Listing

If the listing is complete and no longer in draft form, use the Edit Listing tab to make changes at the listing detail edit form. Edit Listing allows you to change most listing details, change the status or price, upload and manage photos and attachments, change the map location, convert private listings to public, and delete a listing.

### Drafts

Use the Drafts tab to add to or complete a listing you began in an earlier session.

### Clone Listing

Use the Clone Listing tab to create a draft based on the details of an existing listing.



## **Online Forms**

Use the Online Forms tab to access the Instanet website and its property data sheet (PDS).

## **ShowingTime**

Use the ShowingTime tab to access Showing Time tools for a particular listing.

## Add Listing Overview

Use Add Listing to enter public listings in the MLS listing database. You can also enter private listings in your office's private database. See "Listing Detail Edit Form". for more information.

The system provides field-level assistance and validation based on your MLS rules, auto spell checking, auto correction, and quick field location. You can pick up where you left off without losing your work.

Add and manage photos and attachments without leaving listing entry. Upload photos singly or in bulk, drag to order them the way you want, and enhance or crop them.

### Public Record Link

With the exception of co-ops and listings that fall outside of Nassau, Suffolk, Queens, and Kings/Brooklyn; when you create a new listing, the linked public record becomes a starting point, allowing the system to auto-fill some of the listing information. In addition to simplifying the listing process, the public record link creates a link from the listing detail form to the public record, and from the public record detail form to the listing. The link also provides valuable information about the property's listing history.

To establish the link between a new listing and a public record, Add Listing includes a Link Listing to Public Record search. After you select the appropriate public record from search results, the system displays the information it will auto-fill. You can revise the information without affecting the public record itself, or exclude any field. Once the system transfers the edited public record information to the new listing, enter the remainder of the listing information at the Listing Detail Edit Form.

It is possible to add a listing without a public record link. However, this is not desirable and should only be considered if, after exhausting all search options, a public record cannot be found.

### Drafts

Because it is not always practical to enter listing data in a single session, the system creates a draft for each new listing. You can add information to the draft over a number of sessions, but be sure to do so quickly; check with the MLS regarding the number of days drafts remain available.

As you enter information, the system auto-saves your draft once every minute; the system also saves the draft when you leave Add/Edit. You may prefer to click the Save Draft action to be sure the draft is saved. To return to the draft, click the Draft tab, where a list of your drafts displays.

Once you complete all listing information, click Submit to add the listing.

***Notes:***

The draft is a temporary document, purged according to a schedule set by the MLS; it is a good idea to check the Original Date at the Drafts tab to insure you don't lose your work.

The draft is available only to the user who creates it. If you create the listing draft on behalf of another agent, you alone can update it.

## Data Entry

***Tab***

Moves to next field.

***F11***

Enlarges the Stratus MLS window by removing the browser toolbar.

***Reset Action***

Restores all fields to the last-loaded defaults.

***Help for Data Fields***

Click any field label for a dialog box that shows an explanation of the field and information about the type of value you should enter. Click off the dialog box to close pop-up help.

***Required Fields***

The system indicates required fields with a blue asterisk (\*). If you submit a listing before completing all required fields, the system displays an alert for the first required field that is empty, flagging the field label in red. Enter the information, then resubmit the listing until the system accepts it.

A complete list of all required fields that are empty, along with incorrect values displays, displays in red at the bottom of the form. Click any alert to go directly to the field that needs correction.

### ***Data Entry Errors***

The system helps prevent incorrect entry in certain fields. For example, at price fields you cannot enter a non-numeric character. The system rejects dollar signs, commas, and periods and deletes these characters as you enter them.

At other fields, the system flags errors when you press Tab or click away from a field. For example, an alert displays when you move to another field after entering an expiration date earlier than the listing date. The system flags the field label in red and requires that you change the data before you submit the listing.

### ***Dates***

You can enter dates in the following formats:

**Date Format:** 6/30/2007; 6/3/11; June 30, 2011; 6/30; 6-30.

**Today Format:** T (today's date); T+1 (tomorrow's date); T-1 (yesterday's date); T+90 (three months from today). Type T or t; the system accepts both upper and lower case.

### ***Responsive Data Fields***

The system sometimes customizes input fields depending on your entry at an earlier field.

### ***Dependent Data Fields***

Some fields are dependent on your entry at another field. For example, when you select a Town, the system allows only valid Zips for that Town.

### ***Clear Entries***

To clear your entries, click the Reset action.

### ***Navigate Fields***

Press the Tab key to move from field to field, or click the mouse at the desired field.

You can scroll through the form or click the tabs at the top of the form to jump to a particular section of the Listing Detail Edit Form.

***Photos and Attachments***

Add and manage photos and attachments in the “Listing Detail Edit Form” on page 41. The Upload action is available at both sections.

## Add Listing Procedures

Use Add Listing to enter public listings in the Multiple Listing Service. You can also enter private listings in your office's private database.

See "Add Listing Overview" on page 34 for an overview about linking the public record, working with drafts, and data entry.

### *To Add a Listing*

1. Select **Add Listing** from the Listings sub-menu.
2. Select a **Class**. Note: If the listing is a Condo, HOA, or Co-op, select the specific class. (If Co-op, select Public or Private then click Continue and skip to step 4. For all other classes, continue at step 3.)
3. Select a **County**.
4. Select **Public** or **Private**, then click **Continue**.
5. At **Link to Public Record**, if displayed, read the message then click **Close**.
6. At **Link to Public Record Criteria**, if displayed, enter criteria to locate the appropriate public record.
7. Click **Submit**. At the **Results - Link with Public Record** page, select the appropriate public record, click **View** if necessary, then click **Link with Listing**.
8. Information auto-fills from the public record. You can revise this information. If you do not want a field to display at the listing, clear its checkbox.
9. After reviewing auto-filled information, click **Continue**. The listing detail edit form displays, auto-filled with information from the public record.
10. At the listing detail edit form, press the Tab key to move from field to field. Required fields are marked with a blue asterisk (\*).
11. Enter or choose information at each section. You can scroll the length of the form or jump to a particular section by clicking its tab at the top of the form.
12. At the **Photo** and **Attachment** sections, click **Upload** to browse for and upload files.
13. When the draft is accurate and complete, click **Submit** to see the newly-assigned **ML#** and additional options at the **Add/Edit Complete** dialog box.
14. If prompted for a photo, you may choose to upload one or more photos, or order them. See "Manage Photos" on page 168 for instructions to upload, edit, and move photos.

**Note:**

If the listing is incomplete and you plan to add information later, optionally click **Save Draft**. Click **Close** at the confirmation prompt.

## Link Listing to Public Records Search Criteria Page

Use the Criteria—Link with Public Record page—from Add Listing or Edit Listing—to search for the public record that should be linked to the current listing. If you want to see general instructions about entering and working with public record criteria, see “Public Records Criteria Page”

Submit the search when you are satisfied with your criteria.

- If your search finds a single match, the public record displays in Detail View format, where you can link it to the new listing.
- If your search finds more than one match, the Results List page displays, where you can select a public record from the list to link to the listing. If necessary, use the View action to display the listing before linking.
- If your search includes a map shape, matches display in map format. Mouse over the public record markers or review the results list, and select a public record to link to the listing.
- If your search finds no matches, click Revise Criteria at the Results List page or continue to add or edit the listing without linking to a public record.

Once you submit the search, at the resulting Detail View, Results List, or Map page, the blue notification bar at the bottom of the page offers options to Link With Listing, Revise Criteria, Add Without Linking, or Cancel.



## Listing Detail Edit Form

Use the listing detail edit form to enter or edit listing information. The listing's Class determines the fields and section tabs displayed.

Some fields may be auto-filled from a linked public record or a cloned listing.

---

### In this article...

#### About Drafts

The system creates a Draft when you open a new listing detail edit form, and saves it automatically while you work and when you navigate away from Add/Edit. You can return to the Draft in a later work session.

#### Navigating the Form

Press the Tab key to move from field to field, or click the mouse at any field.

To move to a different section you can use the scroll bar, click the section tab along the top of the form to jump, or press the Page Up and Page Down keys.

#### Entering Information

Fields on the Edit Listing Details Form match the order of input fields in the Listing Contract. Enter a value for each field name on the screen. For example, for listing price, the value might be 550000.

#### *Required Fields*

Fields you *must* enter are marked with a blue asterisk (\*).

#### *Responsive Fields*

Responsive data fields display based on your entry at another field. For example, if you enter Y at Price Range Listing, the system displays two text boxes, one for the low list price and one for the high list price. If you enter N at Price Range, the system displays one text box for the list price.

### ***Dependent Fields***

Dependent fields have dropdown lists with options determined by the data you entered at other fields. For example, if you select a value at Town the system provides only those zipcodes valid for that town.

### ***Blocked Data Entry***

The system prevents some inappropriate data entry. For example, you cannot type alphabetic characters in a price text box.

### ***Date Formats***

You may use any of the following date formats in a date field:

1/31/2012 or 1/12

1-31-2012 or 1-31-12

1/31 or 1-31 (the system assumes the current year)

T or t (today)

T+1 (tomorrow)

T-1 (yesterday)

T+/-n (today plus or minus n days)

### ***Field Help Links***

Fields on Add/Edit data entry forms provide links to data-entry help. Click on a field label to open instructions.

### ***Spell Check at Comments***

Comments text boxes provide spell checking and auto correction.

## **Locating a Field**

To locate a particular field on the form, click the Find action. The Find a Field dialog box opens. Enter all or part of the field label then click Find. When the dialog box closes the listing detail edit form displays at the located field.

To locate the next occurrence of the text, if desired, click the Find action again. At the dialog box, click Find once again.

## Previewing the Draft

To preview the listing as you work, click the Preview action. Draft information displays in the Broker-Full detail form. If you have uploaded one or more photos or attachments, these also display. To print the preview, click the Print icon.

## Submitting for Validation

When you submit a complete and valid draft, the system assigns an ML# to the new listing. If required fields \* remain empty, or you have neglected to correct a field flagged in red, the form does not pass validation. A validation summary displays for the Draft. The system flags each erroneous field in red; click the red label for a help pop-up message. Until you correct these fields and re-submit, the system cannot store the listing in the MLS database.

When you successfully submit a valid listing, the Add/Edit Complete dialog box displays with further options. If the listing is new, a newly assigned MLS# displays.

If you have not yet uploaded a photo, you may be prompted for one in lieu of an immediate charge.

## Resetting the Form

To return the listing detail edit form to the state it was in when you opened a Draft or began to add or edit a listing, click the Reset action. The system prompts you to confirm the reset, because all changes made during your current session will be undone.

## Leaving the Draft

The system automatically saves a new listing's Draft periodically while you work. Although it is not necessary, you may use the Save Draft action if you need to leave the work session and want to ensure that your draft is saved.

When you navigate away from Add/Edit, the browser requires a short period of time to finish saving the form before loading the new page. A confirmation prompt displays to confirm your intention to leave Add/Edit. The time it takes for you to enter your confirmation is sufficient for the system to automatically save the Draft.

## Edit a Listing

Choose the Edit Listing tab from the Add/Edit page to make changes in listing details, status and price, photos and attachments, convert private listings to public, and delete the listing. The system tracks all edit changes in History.

---

### How...

#### *To Start Any Listing Edit*

1. At the **Add/Edit** menu, click **Edit Listing**.
2. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review the summary details to confirm this is the correct listing to edit.
3. If the **Try to Link to a Public Record** dialog box displays, decide which option you want. If you decide to search for a public record in order to link it to your listing:

At **Link Listing to Public Record**, enter criteria to locate the appropriate public record. See “Enter Public Records Search Criteria” on page 129.

At the search results **List**, select the appropriate public record, click **View** if necessary, then click **Link with Listing**.

Information that will auto-fill from the public record displays. You can revise any information. If you do not want a field to display at the listing, clear its checkbox.

After confirming auto-fill information, click **Continue**.

The listing detail edit form displays, auto-filled with information from the public record.

4. Choose an option from the list of edit types, then click **Continue**.

#### *To Edit Listing Details*

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review summary details to confirm this is the correct listing to edit.
2. Choose **Edit Listing Details** from the list of edit types, then click **Continue**.

3. At the listing detail edit form, navigate to the section you want and make desired changes. See “Listing Detail Edit Form” on page 41.
4. Click **Submit**.
5. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.

### ***To Change Status***

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review the summary details to confirm this is the correct listing to edit.
2. Choose **Status/Price Change** from the list of edit types, then click **Continue**.
3. Click the **Status Change** tab.
4. At the **New Status** dropdown list, choose a new status. The system displays fields appropriate to the new status.
5. Enter a value at all required fields and any other field you want. (Press the **Tab** key to move from field to field.)
6. Click **Submit**.
7. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.

### ***To Change Price***

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review the summary details to confirm this is the correct listing to edit.
2. Choose **Status/Price Change** from the list of edit types, then click **Continue**.
3. Click the **Price Change** tab.
4. At the **New List Price** field, type the new price.
5. Click **Submit**.
6. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.

### ***To Edit Open House Info***

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review the summary details to confirm this is the correct listing to edit.
2. Choose **Edit Open House Info** from the list of edit types, then click **Continue**.
3. At the **Open House Notes** page, type date, time, and miscellaneous notes.
4. Click **Submit**.
5. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.

### ***To Order Virtual Tours***

1. At the **Edit Listing** tab, type the **MLS#** and click **Open**. Review the summary details to confirm this is the correct listing to edit.
2. Choose **Virtual Tours** from the list of edit types, then click **Continue**.
3. At the Virtual Tour dialog box, select a tour type.
4. Complete the order form as required.

### ***To Manage Photos***

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review the summary details to confirm this is the correct listing to edit.
2. Choose **Manage Photos** from the list of edit types, then click **Continue**.
3. At the **Photos** section of the listing detail edit form, use the action bar to upload, edit, or delete photos as needed. See “Manage Photos” on page 168.
4. Click **Submit**.
5. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.

### ***To Manage Attachments***

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review the summary details to confirm this is the correct listing to edit.
2. Choose **Manage Attachments** from the list of edit types, then click **Continue**.
3. At the **Attachments** section of the listing detail edit form, use the action bar to preview, upload or delete attachments as needed. See “Manage Attachments” on page 54.
4. Click **Submit**.
5. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.

### ***To Change Map Location***

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review the summary details to confirm this is the correct listing to edit.
2. Choose **Map Location** from the list of edit types, then click **Continue**.
3. At the **Map** section of the listing detail edit form, Ctrl+Click at the desired location.
4. Click **Submit**.
5. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.

***To Convert a Private Listing to a Public Listing***

1. At the **Edit Listing** tab, type the **ML#** for the private listing you want to convert. Note: Include the asterisk (\*) at the beginning of the ML#.
2. Click **Open**. Review summary details to confirm the correct listing will be converted.
3. Select **Convert Private Listing to Public**, then click **Continue**.
4. At the confirmation prompt, click **Convert**. The system converts the listing to public, retaining the current Last Status Change (LSC).
5. At the **Add/Edit Complete** dialog box, if the listing is Available, you can view the newly-assigned ML#. Choose another option or click **Exit**.

***To Delete the Listing***

1. At the **Edit Listing** tab, type the **ML#** for the listing you want to delete.
2. Click **Open**. Review summary details to confirm the correct listing will be deleted.
3. Select the edit type **Delete Listing**, then click **Continue**.
4. At the confirmation prompt, click **Delete**.
5. At **Delete Successful**, click **Close**.

## Clone a Listing

Use the Clone Listing tab to copy information from an existing listing. Any previously listed property can be cloned, whether available or unavailable.

The system copies property characteristics from the existing listing to the new listing's draft. Carefully review all copied fields, changing information when appropriate. The system does not copy listing-specific fields like listing price, dates, and listing Realtor. Public listings are cloned as public listings; private listings are cloned as private listings.

### *To Clone a Listing*

1. At the **Clone Listing** tab, enter the **ML#** of the listing you want to clone, then click **Open**.
2. At the detail summary, confirm this is the listing you want to clone, then click **Continue**.
3. The system creates a new draft with some information filled from the cloned listing. At the displayed listing detail edit form, review entries in all sections and make changes as needed.
4. Enter missing information at required fields.
5. If the draft is incomplete and you plan to add information to it later, click **Save Draft**. At the confirmation prompt, click **Close**.
6. When the draft is accurate and complete, click **Submit**. The system assigns an **ML#**.



## Convert Private to Public

You can convert private listings to public regardless of whether the listing is Available or Unavailable. (For example, if the listing is Private Closed the system will convert it to Public Closed.)

### *To Convert a Private Listing to Public*

1. At the **Edit Listing** tab, type the **ML#** for the private listing you want to convert. Note: Include the asterisk (\*) at the beginning of the ML#.
2. Click **Open**. Review the listing's summary details to confirm the correct listing will be converted.
3. Select the edit type **Convert Private listing to Public**, then click **Continue**.
4. At the confirmation prompt, click **Convert**. The system converts the listing to public, retaining the current Last Status Change (LSC).
5. At the **Primary Photo Required** dialog box, if displayed, click **OK** if you will upload your own photo to avoid a fee.
6. At the **Add/Edit Complete** dialog box, if the listing is Available, you can view the newly-assigned ML#.

## Manage Photos

While editing a listing at the listing detail edit form, or after choosing Manage Photos at the Edit menu, you can upload your own photos or pull in available photos at Photo Library. With the photo work space displayed, you can preview the listing with photos, add photo descriptions, and move or delete photos. You can also edit and format a selected photo.

When displayed in the listing and photo gallery, each photo is placed in a rectangular space in 4:3 aspect ratio (1/3 wider than tall). While photos of any shape can be displayed within that space, your photos will look best if you ensure they are the same shape as the space. You may optionally use the Crop tool in the Photo Editor to fit them to the standard rectangle. See “Edit Photos” on page 170.

### **Notes:**

No photos are visible until at least one is added.

Once you add photos to the work area, a thumbnail photo displays for each, and the Edit action is available.

Photos that don't match the standard shape display with an asterisk \*, an alert prompting you to review them.

---

## How...

### **To Manage Photos**

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review the summary details to confirm this is the correct listing to edit; OR

At **Add/Edit Complete**, choose **Manage Photos** from the list of edit types when submitting or editing a listing.

2. At the Photos work space, use the action bar to **Upload** a photo or choose from **Photo Library**; and/or **Edit, Delete, Preview**, or change the order of selected photos as needed.
3. Click **Submit**.
4. At the **Add/Edit Complete** dialog box, choose another option, or click **Exit**.

***To Upload Photos***

1. At the **Photos** work space, click **Upload** on the action bar.
2. At the **Upload Photos** dialog box, browse for a photo, type a description, then click **Upload**.

***To Preview the Listing with Photos***

1. At the **Photos** work space, click **Preview** on the action bar. The listing (or draft) displays in detail view. Photos display in the top left corner, and can be navigated using forward and back arrows.
2. Click **Close** to close the Preview window.

***To Add or Change a Description After Uploading***

1. At the **Photos** work space, click the text box under the photo thumbnail.
2. Type a description.

***To Move a Photo***

1. At the **Photos** work space, select the desired photo.
2. While pressing the mouse button, drag the photo to the desired location, midway between two others.
3. Wait for space to open, then release the mouse button to drop the photo at the new location.
4. Drag and drop additional photos as needed.

***To Delete a Photo***

1. At the **Photos** work space, select the desired photo.
2. Click **Delete** on the action bar.
3. At the confirmation prompt, confirm the deletion.

***To Edit a Photo***

1. At the **Photos** work space, select the desired photo.
2. Click **Edit** on the action bar.
3. Optionally enhance the photo. See “Edit Photos” on page 170.
4. Click **Save** when changes are complete.

## Edit Photos

Use the Edit Photo dialog box—available from the Edit action at the Photos tab during listing Add/Edit—to enhance a listing’s photos. You can make a photo darker or brighter; change its contrast; or rotate, re-size, crop, or delete it.

Use navigation arrows to move between photos, and the delete button to delete the photo.

**Note:**

While maximizing resolution, the system automatically reduces the *file size* of each of your uploaded photos to a maximum set by your MLS. However, the system does *not* crop or change your photo’s aspect ratio. Instead, the system allows you to upload a photo cropped to a non-standard shape, which you may prefer, for example, when displaying a small detail. You can, if desired, quickly crop photos of non-standard shape to better fit the space allowed: 1/3 wider than their height. (See “To Crop a Photo,” below. )

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## How...

### **To Change Brightness**

To darken the overall photo, click the Darken action at Edit Photo. To continue darkening, repeat the action as needed.

To lighten the overall photo, click the Lighten action at Edit Photo. To continue lightening, repeat the action as needed.

### **To Change Contrast**

To decrease the contrast between the photo’s light and dark colors, click the - Contrast action. To continue decreasing contrast, repeat the action as needed.

To increase the contrast between the photo’s light and dark colors, click the + Contrast action. To continue increasing contrast, repeat the action as needed.

### **To Rotate a Photo**

To rotate a photo counterclockwise 90°, click the Rotate action. To continue rotating in the same direction, repeat the action as needed.

To rotate a photo clockwise 90°, click the + Rotate action. To continue rotating in the same direction, repeat the action as needed.

### ***To Crop a Photo***

When you upload a listing photo, the system retains its original aspect ratio. However, your photos will be shown in spaces that are rectangular — 1/3 wider than tall. While photos of any shape can be displayed within that space, you can maximize their appearance by ensuring they are the same shape as the space. You may optionally use the Crop tool to fit them to the standard rectangle, with an aspect ratio of 4:3.

If the system determines that a photo's aspect ratio differs significantly from the standard 4:3, an asterisk displays on the photo thumbnail. To crop a photo to standard dimensions, use the Crop action on the Photo Edit dialog box.

The Crop action applies to the photo currently displayed in the Edit Photo dialog box. The action toggles on and off. To enable cropping, click the Crop action. To exit cropping, click Crop again, or click Cancel.

When you enable cropping, the system grays out any portion of the photo that must be removed in order to match standard dimensions. Drag a corner handle in either direction. While you drag, the system constrains the photo to the correct aspect ratio. To complete the crop, click the Apply button. The system removes the grayed out portion and displays the cropped version of the photo.

Review the cropped photo. To permanently save the change and close the Edit Photo dialog box, click Save.

### ***To Navigate Through Photos***

To view more photos and move between them, use the Previous and Next actions that display as green arrows.

### ***To Delete a Photo***

To delete the photo currently displayed in the Photo Edit dialog box, use the Delete action.

## Manage Attachments

While editing a listing at the listing detail edit form, or after choosing Manage Attachments at the Edit menu, you can upload attachments and preview, describe, and delete them. The system provides a dropdown list of available attachment types.

- Once you upload attachments to the work space, a pdf thumbnail displays for each. Click to open the attachment.
- The system automatically saves changes at the attachment work area.
- To select an attachment before deleting, click its checkbox.

**Note:**

Maximum file size may be restricted by the MLS.

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## How...

### *To Manage Attachments*

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review summary details to confirm this is the correct listing to edit.
2. Choose **Manage Attachments** from the list of edit types, then click **Continue**.
3. At the **Attachments** work space, use attachment actions available on the action bar, including **preview**, **upload**, and **delete**; you can also **change the order** of attachments as needed.
4. Click **Submit**.
5. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.

### *To Upload Attachments*

1. At the **Attachments** work space, click **Upload**.
2. At the Upload Attachments dialog box, browse for a file to attach, type or choose a description from the dropdown list, then click **Upload**.
3. Click **Submit**.
4. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.

***To Preview a Listing's Attachments***

1. At the **Attachments** work space, click **Preview**. The listing (or draft) displays at the Details page.
2. Double click an attachment to view it in Adobe Reader, then close the Reader window.
3. Click **Close** to close the **Preview** window.

***To Add or Change an Attachment Type***

1. At the **Attachments** work space, click the text box under the attachment thumbnail.
2. Choose a type from the dropdown list.

***To Delete Attachments***

1. At the **Attachments** work space, click the desired attachment's checkbox to select it.
2. Click **Delete**.
3. At the confirmation prompt, confirm the deletion.

## Manage Map Location

While editing a listing at the listing detail edit form, or after choosing Map Location at the Edit menu, you can add or change latitude and longitude values for a listed property. To change the map location of the property, hold the control key and click the desired location on the map below.

Zoom in or out as needed using the zoom controls on the map. You can also double-click the map to simultaneously zoom in and center the map on the clicked point. Click and drag to move the map. See “Work with Mapped Listings” on page 93.

You can set Map Location at Add Listing or Edit Listing. The procedure below is for Edit Listing.

### *To Edit the Listing's Map Location*

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review summary details to confirm this is the correct listing to edit.
2. Choose **Map Location** from the list of edit types, then click **Continue**.
3. At the **Map** work space, Ctrl+Click at the desired location.
4. Click **Submit**.
5. At the **Add/Edit Complete** dialog box, choose another option or click **Exit**.



## About Status and Price Changes

At Edit Listing, the edit type Status/Price Change allows you to update a listing's contract status and price. Once you click Confirm at Edit Listing, the screen shows two tabs: See "Performing Status Changes" on page 59 and "Performing Price Changes" on page 60.

Both types of changes are tracked in History. The listing displays its contract status at the Last Status Change (LSC) field.

- You can change the contract status of your own offices' listings with Status Change: UC, PBA, BOM, CL, W/R, and RE.
- You can change the listing price of your own offices' listings with Price Change: PC.

Other changes to LSC are made by the system. When you submit a new listing, the system automatically sets LSC to NEW. When the listing's expiration date is reached without an extension, the system sets LSC to EXP (Expired).

To start a status or price change, choose Status/Price Change from the Edit Type list.

**Note:**

The system allows you to make only those status changes appropriate for the listing's Class and LSC.

***Use the Status Change Option to Change:***

UC - Under Contract

PBA - Pending Bank Approval (for Short Sales)

BOM - Back on Market

CL - Closed

W/R - Withdrawn/Released

RE - Rented

***Use Price Change to Change:***

PC - Price Change

***Use Edit Listing Details to Change:***

EXT - Extended (by changing the expiration date)

Modify Property Characteristics, remarks, and so forth

Open Houses

***Automatic System Changes:***

NEW - Listing with no contract changes

EXP - Expired

## Performing Status Changes

You can change the contract status of your office's listings with Status Change. The system tracks status changes in History, and displays each listing's contract status at the Last Status Change (LSC) field.

Status changes depend on rules set by the MLS, and are affected by Class and LSC. See "About Status and Price Changes" on page 57.

### *To Perform a Status Change*

1. At the **Add/Edit** menu click **Edit Listing**.
2. At the **Edit Listing** tab, type the **ML#** then click **Open**. Review summary details to confirm this is the correct listing to edit.
3. At the **Edit Type** list, choose **Status/Price Change**, then click **Continue**.
4. At the **Status/Price Change** page click the **Status Change** tab.
5. The page shows the listing's Current Status. At **New Status**, select a status from the dropdown list.
6. Enter information at all required fields.
7. Click **Submit**.

## Performing Price Changes

You can change the price of your office's listings with Price Change. The system tracks price changes in History. See "About Status and Price Changes" on page 57.

- If the listing is not a Price Range listing, the Current List Price field displays. Update the value at New List Price.
- If the listing *is* a Price Range listing, the Current Low List Price and Current High List Price fields display. Update the value at New Low List Price and/or at New High List Price.

### *To Perform a Price Change*

1. At the **Add/Edit** menu click **Edit Listing**.
2. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review summary details to confirm this is the correct listing to edit.
3. At the **Edit Type** list, choose Status/Price Change then click **Continue**.
4. At the **Status/Price Change** page click the **Price Change** tab.
5. The page shows the listing's current price. At **New Price**, enter a new price.
6. Click **Submit**.

# Search Listings

## About Listing Searches

Search finds listings of any status, in any class, by any search criteria you choose. You can search across classes and find available and/or unavailable listings. You can also specify that the listings should be public, private, or both.

The system offers a number of ways to search; allows you to save and share search criteria; and collect, map, and work with results.

As needed, enter or select criteria for any field displayed. You can add more fields to the search form from the Other Fields dropdown list.

### General Notes on Searches

To help avoid performance problems over the Internet, the system limits the number of listings displayed in Search Results. Although a search may produce more than it can show, for all searches except Map Search and New search with a shape, listings are limited to a number determined by the MLS.

Use sufficient criteria to insure that your search finds fewer than the maximum number of listings. Before you submit the search, check the counter at the Criteria page to see the number of listings the search will find.

You can stop a search by clicking the browser's Stop button.

### Choose a Search Type

**New Searches** Search forms present a set of commonly-searched fields. Available search forms for a single class include Quick Search and Flex Search forms; search forms for more than one class are limited to Flex Search.

**Pre-defined Searches** Provides search forms for the most common, requiring minimal data entry.

**Saved Searches** Provides a selection of your own saved searches, as well as those shared by others in your office. When selected, the saved search opens, showing all saved criteria.

**Map Searches** Allows you to locate listings on a map, optionally starting with a saved shape or location. Listings show as colored markers in the geographic location that you either define in criteria or draw on the map, and in a list below the map.

**MLS# Searches** Allows you to search for particular listings.

## Searches and Search Results

Listing searches have two basic components: search criteria and search results.

- Search criteria may be entered in search fields or located dynamically on a map. Save and share a search as desired.
- Search results may be viewed in three different modes: Search Results list (List), Detail View (View), and Map.

### Search Criteria

Using one of the five search types, designate your location by entering field criteria at the search form, or draw a shape or location on the map page. Complete criteria entry. The number of search fields entered affects the number of listings found; you can view a dynamic count before submitting your search.

### Search Results and Actions

Once your search finds matches, you may display and explore the matching listings at List, View, or Map pages.

Standard actions for all three pages include List, View, Map, Photos, Slide Shows, Virtual Tours, Attachments, Statistics, and Directions. Actions also allow you to narrow the list, revise criteria, add listings to a cart, add to Favorites, print, send e-mail, and get help.

#### *Search Results (List)*

If you enter criteria in search fields, results display at the Search Results (List) page. You can sort, print, and download the list, or a narrowed version of the list, and change the list's columns. From list mode you can switch to View or Map mode, and choose any of the actions listed above.

#### *Detail View (View)*

The Detail View (View) page displays detail forms for listings that you selected at List or Map pages. Detail forms can be in one-per-page format or multiple-per-page format. From the View page you can switch to List or Map, and choose any of the actions mentioned above.

### Map (Map)

If you search for listings with a map search, results display as markers and as a list below the map. The Map page shows listing markers, points of interest, pop-up details, and allows dynamic changes to criteria. From the Map page you can switch to List or View, and choose any of the actions mentioned above.

### Price Range Listings

Some listings are assigned both a high and a low listing price. Listing output forms, in such cases, may therefore show a higher number than the range you specified in your search criteria—this means the *low* price of each match *is* in your range.

### Rules for Search Types

Item	Description
New Search	Choose one or more values at Class, Availability, , Public/Private. When searching Unavailables, you may include archived listings.
Map Search	Choose one or more values at Class, Availability, , Public or Private. You cannot search archived listings at Map.
Saved Search	Choose a Saved Search from the list. If the search you choose has pre-set values for Class, Availability, Public/Private, Archives, they cannot be changed. If the search does not have pre-set values, select one or more of each.  When the saved search includes Unavailables, and is not a Map search, you may also include archived listings (when enabled). In this case, you can specify only one town in your search criteria (the system eliminates others). You cannot choose a zip code, zone, or county.
Pre-Defined Search	Choose a Pre-defined Search from the list. If the search you choose has a pre-set value for Class, Availability, Public/Private....., they cannot be changed. If the search does not have pre-set values, select one or more of each. When the pre-defined search is for Unavailables, you can include archived listings (when enabled).
MLS# Search	In the text box, enter one or more ML#s, each separated by a comma, space, or line.



## Ways to Search Listings

A number of ways to find listings are available. Some are easier for newcomers, while others demand more familiarity with the system's listing fields.

To choose a search type, click one of the tabs provided at the New Search page.

### New Search

At New Search you have two distinctly different ways to perform a search, through selection of search forms: Quick Search and Flex Search. Select the one you want from the Search Form dropdown list.

#### *Quick Search*

The Quick Search form is suitable for commonly-searched fields for each listing class. Enter (or select) criteria for any search field displayed, and add more fields as needed.

#### *Flex Search*

The Flex Search form offers a customized search for users familiar with the names of the search fields. After designating a search location, create your own search form by adding any field from a single, alphabetized dropdown list. The system displays your search criteria as you build it.

#### *Note:*

Your latest choice of search form becomes the default for future searches, but you can change search forms at any time.

### Pre-Defined Search

Pre-defined searches require minimal data entry, offering a shortcut to the most common searches.

## **Saved Search**

Saved searches include those you have created and saved yourself, as well as those shared by your office. By choosing a saved search you can immediately view search results, or make modifications in criteria before you submit.

## **Prospect Search**

Prospect searches allow you to create a new prospect profile and enter her criteria, run a search for a saved prospect, manage a prospect's profile and criteria, extend an expiring prospect match, and Delete a prospect.

## **Map Search**

Interactive Map searches offer points of interest, drawn boundaries, and zoom levels to locate properties. Listings display as markers, with mouse-over pop-up detail. A dynamic criteria panel allows quick changes in price, address, and other criteria. In road, aerial, and birds-eye views, mapped results automatically update as you zoom or pan to a precise location.

## **MLS# Search**

MLS# searches are a quick way to retrieve listings when you know the desired MLS numbers.

## Search Across Classes

Search fields are customized for each class. Differences may be in the *kind* of search control (for example, dropdown list, text box, and so forth); the difference may also be listed in the options at a particular field.

The system combines the search fields for selected classes in a meaningful way. Some fields require special attention:

- When options in a dropdown list vary between classes (as do, for example, Style options), the system combines options from all the chosen classes into a single list. In such cases, either avoid choosing an option for the particular field, or choose an option that applies to all selected classes.
- When a field offers dropdown options for one class and a text box for another class, the system offers the search field in the form of a text box. Choose Starts/w from the drop-down list and enter the first few characters of the value.

## Search Archived Listings

Listings that are off the market for a long period of time are archived. The time period is specified by the MLS. With the exception of Map searches, archived listings can be included in searches for Unavailable listings.

If you choose to include archived listings in a search, you can specify only one town in your criteria. You cannot choose a zone, zip code, or county.

When a saved search includes archived listings, and its criteria is pre-set with more than one town, the system eliminates all but one in your search criteria.

Check with the MLS for the schedule that the system uses for archiving listings of each status.

### *To Search Archived Listings*

If your search allows, select the **Include Archived Listings** checkbox along with other basic criteria, then proceed with your search as usual.

## Dynamic Criteria Panel

The dynamic criteria panel (DCP) lets you add and revise criteria while viewing search results at Map or List, and is a quick and powerful alternative to the Revise Criteria button. You can show or hide the dynamic criteria panel as needed. When opened, the panel is positioned at the right side of a Map or List.

Use the criteria panel to add, remove, or revise criteria. Use the Other Fields dropdown list to add fields to the panel. The system updates search results after each change you make; if you prefer not to see property markers on the maps, select the Hide checkbox in the dynamic criteria panel.

Once opened, the dynamic criteria panel remains open until you close it.

The panel automatically opens when you run a map search—or any other search that includes a drawn shape—and the panel’s “Map Search” checkbox is automatically selected. Although the panel is automatically closed at List, you can open the panel if needed. When opened at List, the “Map Search” checkbox is unselected.

**Note:**

When viewing Favorites or Listing Cart while at List or Map, the dynamic criteria panel is *not* available.

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## How . . .

### ***Use the Map Search Checkbox***

At the top of the dynamic criteria panel, a checkbox labeled “Map Search” controls whether or not a map offers a full map search that updates automatically as you change the map, shape, or criteria; or a fixed set of mapped results. By selecting and clearing the Map Search checkbox you can switch between a searchable map and one that, even when zoomed or dragged, does not change the current set of mapped listings.

*When you select Map Search, you enable a full map search.* The system removes the following fields from the dynamic criteria panel: Town, Zip, Zone, County, and ML#. To define or change a location you must drag, zoom, or draw a map shape. All changes trigger an automatic re-run of the search. Updated results are immediately reflected in the map frame and in the results list below.

*When you clear Map Search, the set of mapped results remains fixed.* The system restores Town, Zip, Zone, County, and ML# fields. If, however, you attempt to draw shapes, the system prompts you to enable Map Search.

Whether the dynamic criteria panel is open or closed, the current state of the Map Search checkbox remains the same. If the Map Search checkbox is selected before you close the criteria panel, it remains selected when you close the panel.

**Notes:**

When you start a *Map Search* at the Search Type page, search results display at Map. The dynamic criteria panel automatically opens with Map Search selected, so a full map search is enabled.

When you start a *New Search* at the Search Type page and define the location by field (Town, Zip, Zone, County, ML#), results display at List. The dynamic criteria panel automatically closes with the Map Search checkbox cleared. Without leaving List, you can open the dynamic criteria panel and change criteria to update the results list. To see those changes at Map, click Map at the action bar. In this case, at Map, the dynamic criteria panel is closed by default, and the Map Search checkbox remains cleared.

To enable a full map search at Map, open the dynamic criteria panel and select Map Search.

To work instead with a fixed set of mapped properties at Map (without enabling a full map search) leave the Map Search checkbox deselected.

When you start a *New Search* at the Search Type page and define the location by shape (polygon or radius), results display at Map. The dynamic criteria panel automatically opens with Map Search selected, enabling a full map search.

**To Hide Map Markers**


At the top of the dynamic criteria panel, a checkbox labeled “Hide Listings” controls whether or not listing markers display on the Map along with search results below. When selected, Hide Listings prevents markers and results from showing, even when the Map Search checkbox is selected at the criteria panel.

**Note:**

Hide Listings does *not* prevent searches from being run with every change to the map or criteria when the Map Search checkbox is selected; Hide Listings merely suppresses the display of markers and results.

1. View the map with markers displayed.
2. Click **Hide Listings** at the dynamic criteria panel. The markers and results are hidden from view.
3. Clear the Hide Listings checkbox to show the listings.

### *To Open and Close the Dynamic Criteria Panel*

To open the **dynamic criteria panel**, if it is not already open, click  the **down arrow** at the top right side of List's control bar. (Find the arrow next to the Revise Criteria button.)

To close the **dynamic criteria panel**, click  the **up arrow** to the right of the panel's title.

### *To Conserve Display Space for the Map and Dynamic Criteria Panel*

If the display on your screen is too crowded to simultaneously display the left-side menu, map, and dynamic criteria panel, the system automatically closes the left menu and opens the top menu to allow room for the map and dynamic criteria panel.

To close the **dynamic criteria panel**, click  the **up arrow** to the right of the panel's title.

To re-open the left menu, click  the **down arrow** at the left side of the horizontal menu bar.

### *To Preview Search Results at the Dynamic Criteria Panel*

Just as you can preview criteria at the Criteria page, you can preview criteria at the dynamic criteria panel. The panel has its own small action bar.

To preview search results, click **Preview** on the action bar. Preview shows a summary of the search criteria in the form of search statements. If the criteria is valid, you can see how each search statement reduces the count of results the search will find.

### *To Save the Updated Search*

Just as you can save a search at the Criteria page, you can save a search at the dynamic criteria panel. The panel has its own small action bar.

To save a search, click **Save Search** on the action bar, enter a name, and click **Save**.

To save changes to a previously-saved search, click **Save Search** on the action bar. Then save the changed search with a new name: Click **Save As**, enter a name, and click **Save**.

***To Save a New Prospect Search***

You can save a prospect search at the dynamic criteria panel. The panel has its own small action bar.

To save a prospect search, click Prospect on the action bar. At the Create Prospect dialog box, fill in the fields and click **Save Prospect**.

The new Prospect is now available from the Search Type page, and is visible at Contacts.

***To Clear Criteria in the Dynamic Criteria Panel***

Just as you can clear Criteria at the Criteria page, you can clear criteria at the dynamic criteria panel. The panel has its own small action bar.

To clear criteria, click **Clear** on the action bar.



# Enter Search Criteria

## About Search Criteria

Use the Criteria page—from a search tab or the Revise Criteria button at search results—to choose characteristics for the listings you want to find.

First choose a Search Form from the dropdown list. For example, at a New search for residential available listings, the Search Form options are Quick Search and Flex Search. At each desired field, enter a full or partial value or choose one or more values from a dropdown list. To add more fields, choose them at the Other Fields dropdown list. After *submitting* your criteria, the results list (List) page shows results that match your criteria. If there is only one match, the system opens the listing at View.

### Selecting the Location—Mandatory

All listing searches except MLS# Search require that you select a location before you submit criteria.

- **To choose a location by field:** select towns, zipcodes, zones, counties from the dropdown lists on the Criteria page. When you select the location by field, search results display at the Results List (List) page.
- **To choose a location by drawing a map** See “Work With Criteria” on page 75. When you draw the location by shape, search results display at the Map page.

## Work With Criteria

When performing New Search, Saved Searches, and Pre-Defined Searches, you must choose characteristics for the listings you want to find. Enter or select search criteria at the Criteria page, where a search form displays.

When you have clicked Continue after beginning your search and entering basic criteria, a suitable search form displays. You can change the search form, except in the case of cross-class searches.

The field types included on a search form vary. They include:

- Multi-Select and Dropdown Lists where you select one or more options (for example, Town), or exclude options with the Not checkbox.
- Min/Max fields where you type a range of values (for example, List Price *from* 500000 *to* 600000).
- Text fields where you enter all or part of the search text you want (for example, Street Name), or exclude options with the Not checkbox.
- Multi-Select Checkboxes (for example, Features).

### Not Criteria

“Not” checkboxes are available in drop-down lists and text boxes. The checkbox doesn’t display if a field is numeric, currency, identifier (such as ML#) or date/timestamp (such as expiration date).

When you select the Not checkbox, the search criteria you select is *excluded* from the search results. For example, if the selection at Style is “Contemporary” and the Not checkbox is selected, the search finds listings for all Styles *except* Contemporary.

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## How . . .

### **To Choose a Search Form**

1. At the Search Form dropdown list, choose the form you want:

*Quick Search:* To search by the characteristics relevant to your basic criteria choices, use the Quick Search form. Enter or select values at any field; add more fields as needed from the Other Fields dropdown list.

*Flex Search:* To customize a form, use the Flex Search form. In order to build a search, choose more fields from the Other Fields dropdown list.

*Pre-Defined:* Available for Pre-Defined searches. These search forms have a limited number of fields relevant to the chosen search.

2. Enter criteria.

### ***To Define the Location by Field or Map Shape***

For all searches except MLS# Search, you must define a location before you submit your criteria. You can define locations two ways: by selecting Town, Zip, Zone, County fields at the Criteria form; or by drawing a polygon or radius at Map.

You must choose *either* geographic fields at the criteria form *or* a map shape at Map. You cannot use both methods to define a location.

You can switch back and forth between the Criteria and Map actions, and submit the search at either page.

#### ***By Field, at the Criteria Form***

Choose Towns, Zips, Zones, Counties from the dropdown lists. You must make a selection from these fields unless you plan to draw the location at the Criteria page's Map tab. When you choose a value from more than one geographic field (for example, two Towns and a Zone), search results include properties in *all* the selected locations. This allows you to search properties in a particular zone along with bordering towns.

#### ***By Shape, at Map***

Start at the Criteria page, then click Map on the action bar. The map displayed is limited to drawing a shape, and optionally submit the search without returning to the Criteria form. You can move the map, zoom in and out, and draw a polygon or radius around the region you want. You can also save the shape for later use, clear the shape, choose a saved shape from the Used Saved Shape dropdown list, and choose from Places (points of interest) or address locations.

If you use Map to define and submit the location by drawing a shape, the system displays search results at the Map page instead of the search results list (List).

### ***To Enter Criteria at Various Field Types***

- Select an option at ***dropdown lists*** (for example, Street Name starts w/) then enter all or part of a ***text value***. To enter more than one text value, click the **Or** button. To exclude options, click the **Not** checkbox.
- Select one or more options at ***multi-select lists*** (for example, Style) or exclude options with the **Not** checkbox. To choose more than one option, Ctrl+Click each one you want.
- Select one or more checkboxes at ***multi-select checkboxes***.
- Type a range of values at ***Min/Max fields*** (for example, Baths from 2 to 3).

### ***To Exclude Values with NOT***

1. Click the **Not** checkbox at the desired field.
2. Select or enter the value(s) you want to exclude from results.

### ***To Clear Criteria***

- To clear field criteria, click **Clear** on the action bar.

#### ***Note:***

To clear a **map shape**, switch to **Map**, then click **Clear** on the action bar.

### ***To Add More Fields to the Search Form***

1. Click the **Other Fields** dropdown list at the bottom of the search form.
2. Select a field.
3. Choose or enter criteria as needed.

### ***To Count Results On the Fly***

- As you enter criteria, a counter on the action bar dynamically updates the number of results.

### ***To Preview the Search***

1. Enter desired search criteria.
2. Click **Preview** on the action bar.
3. At the criteria summary, review how each search statement reduces the number of results the search will find.
4. Click **Close** to return to the **Search Criteria** page.

### ***To Save and Share the Search***

1. Click **Save Search** on the action bar.
2. Enter a name, and click **Save**.

To save changes to a previously-saved search, click **Save Search** on the action bar, then click **Save As**, enter a name, and click **Save**.

To save a copy of another owner's search with changes, click **Save Search** on the action bar, then click **Save As** and name the search. Search assigns you ownership of the new copy.

### ***To Submit the Search***

1. At **Criteria** or **Map**, click **Submit** after entering field criteria or drawing a map shape.
  - New, Saved, Pre-Defined, and MLS# Search Results display at the **List** page; they display at the **Map** page if you drew a shape at Map.
  - Map search results display at the **Map** page.

# Results List

## About Search Results

Use the Results (List) page—after submitting search criteria—to view search results in a simple one line format called a column set. By default, results open in the column set appropriate for the Class, Availability, and type of search.

You can display all the results in a single scrollable list, or page through them. You can double click to open detail reports (View) for all or selected results, view a count of the results, sort by one or more columns, choose or customize a column set, and add results to your listing cart.

Use the action bar to switch between List, View, and Map. You can also view photos, slide shows, statistics-and-counts data, get driving directions, narrow or expand the list of results, flag favorites, print, send, or download the detail views or listing rows, and add results to your listing cart.

To change your criteria and view immediate results, open the dynamic criteria panel and make your changes without leaving the Results page. (See “Dynamic Criteria Panel” on page 69.) Alternatively, click Revise Criteria, make your changes, and submit your search again.

**Note:**

In order to avoid Internet performance problems, the MLS limits the number of search results at List.



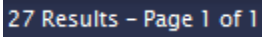
## Work With Results


Use the Results (List) page—after submitting search criteria—to view search results in a simple one line format called a column set. By default, results open in the column set that is appropriate for the Class, Availability, and type of search. Column sets display rows of information about each selected column heading in the set.

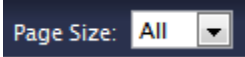
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### How . . .


#### *Navigate Search Results*

 The **page counter** shows the number of results and pages, including the current page's number.

 The **navigation buttons** allow you to navigate through each page. From left to right, the buttons represent First, Previous, Next, and Last.

 The **Page Size dropdown** list allows you to set the number of rows on a page: 20, 50, 100, and All. To view all results on a single, scrolling page, choose All.

 On Map pages, the **Close Map List button** lets you hide the results list under the map. This allows you to view a larger portion of the map. To increase or decrease the amount of space devoted to the map, drag the divider between the map and list up or down.

 On Map pages, the **Open Map List button** restores the results list to the default height or to the height you previously set by dragging.

#### *To Select Results*

When you select a row, it is highlighted with color and its checkbox is selected.


- To select one row to display at View, double click on it. Alternatively, select the row's checkbox. Click again to clear the checkbox.
- To select multiple rows, select each desired checkbox or Ctrl+Click on each row you want.
- To select *all* results when Page Size is set to All, select the checkbox in the heading row.

- To select *all* the results when Page Size is set to 20, 50, or 100, select the checkbox in the first page's heading row. A message displays below the column headings. Click the message's underlined link (for example, select all 53) in order to choose all search results on all pages.


### ***To Narrow and Expand the List***

1. Select the rows you want to keep.
2. Click **Narrow** on the action bar. The narrowed list displays.
3. To further reduce results in a narrowed list, repeat steps 1-2.
4. To restore all results after narrowing once, click **Expand** on the action bar.
5. To return to the original list when you have narrowed more than once, click Expand repeatedly.

### ***To Add Results to the Listing Cart***

- At any row, click the  **Listing Cart** icon to add the listing to the listing cart.

### ***To Add Results to Favorites***

- At any row, click the  star to select the item as a favorite.

### ***To Display Detail Reports***

- To view all or selected results in detail format, click View at the action bar.

### ***To Map the Results***

- To see all results on the map, click **Map** at the action bar.

#### ***Note:***

You can narrow results before mapping them. See “About Mapping Listings” on page 92.

### ***To View Photos***

1. Select properties whose photos you want to see.
2. Click **Photos** at the action bar to open the photo viewer.

When displaying multiple properties at the photo viewer, the primary photos

display. When displaying one property at the photo viewer, all photos for that property display.

3. Click a photo to enlarge it. To restore its original size, click again.
4. Click **Close** to close the photo viewer.

### ***To View Slide Shows***

1. Select properties whose slide shows you want to see.
2. Click **Slideshow** at the action bar to open the slide show viewer.

When displaying a slide show for multiple properties, the primary photo displays for each. When displaying a slide show for one property, all photos for that property display.

3. If desired, mouse over the current photo to show navigation arrows. Click right or left arrows to move to the desired photo or simply click the desired photo thumbnail.
4. Click **Close** to close the slide show.

### ***Note:***

To see a slide show of the primary photo for multiple properties at View, choose a form that displays several properties per page (for example, a thumbnail form).

### ***To View Statistics***

To display tables of statistical and count data for all or selected results, click **Statistics** on the action bar.

### ***To Choose a Column Set***

1. Select a column set from the **Columns** dropdown list. The dropdown list includes MLS sets, your custom sets, and sets that others have shared with you.
2. Select a set from the list. The newly-selected set becomes your default, which you can change any time.

### ***To Sort by a Column***

1. Click on a column heading to sort results in ascending order. An upward arrow indicates ascending order.
2. Click again to reverse the order. A downward arrow indicates descending order.

3. To define a multi-level sort for the column set, if needed, click **Customize**. See “Customize a Column Set” on page 267.

### ***To Sort by Multiple Columns***

1. Click on a column heading for the broadest category, such as Town.
2. Ctrl+Click another column to sort by a second category, such as Style.
3. If desired, Ctrl+Click another column to sort by a third category, such as LSC.



### ***To Get Driving Directions***

1. Choose results in the order that you want to travel.
2. Click **Directions** on the action bar. The Driving Directions dialog box displays.
3. To move, edit, or remove selected addresses, select the corresponding checkbox then click a button for the appropriate action.
4. To add another address to the list, click **Add**.
5. To customize your route, select options for **Avoid Traffic**, **Show Listings on Map**, and **Round Trip** as needed.

### ***To Edit a Listing***

1. Select the listing you want to edit.
2. Click **Edit** on the action bar.
3. At the Edit dialog box, select the option you want then click **Continue**. See “Edit a Listing” on page 44.

### ***To Change Criteria Instantly at the Dynamic Criteria Panel***

1.  To open the **dynamic criteria panel**, click the **white downward arrow** at the far right of the title bar.
2. Choose or type criteria at any field, or add a field at the **Other Fields** dropdown list.
3.  To close the open panel, click the **white upward arrow** at the top of the panel.

### ***To Return to the Criteria Page***

- Click **Revise Criteria** on the title bar.

# Detail View

## About Detail View

Use the Viewaction—from List or Map—to display the details for all or selected listings. A detail form can display in one-per-page format (for example Client Full, Flyer) or multiple-per-page format (for example Comparison, Consumer Thumbnail).

At View you can choose a detail form, page through the listings, select favorites, and more.

To switch from View to List or Map, use the action bar. At the action bar you can view photos and slide shows, get directions, and add to your listing cart. You can return to the Criteria page to revise your criteria and re-submit your search. You can access the listing's history, edit the listing, and more.

**Note:**

If you choose the View action without first selecting results at List, Map, or Photos, the Detail View page displays the first of *all* the listings. Use the navigation buttons to page through the listings.

## Work with Detail View

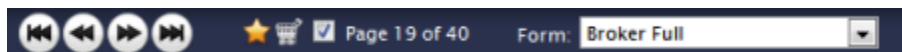
At View you can select a detail form, page through the public records, open available links, and more. You can return to the Criteria page to revise your criteria and re-submit your search.

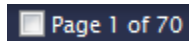
To switch from View to List or Map use the action bar. At the action bar you can also view photos and slide shows, and get directions.

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### How . . .

#### To Navigate at View



 **Page 1 of 70** The **page counter** shows the number of results currently available for View, including the current result's number. A check in the checkbox indicates that the listing is selected. To deselect the viewed listing, clear the checkbox.



The **navigation buttons** allow you to page through the detail forms. From left to right, the buttons represent First, Previous, Next, and Last.



The **Form dropdown list** allows you to select a detail form.


#### To Select Properties at View

- To select properties while viewing each in a one-per-page form, select the page control checkbox in the **page counter**. Click again to clear the checkbox and deselect the property.
- To select properties while viewing multiple-list forms, select the property's checkbox in the top right corner of each detail report.
- To view *all* listing detail reports, leave none selected. The system interprets the selection of none as all.

#### To Choose a Form at View

1. At the View page, open the **Form** dropdown list.
2. Click the desired form. The newly-selected form becomes your default until you choose a different form.

### **To Add to the Listing Cart**

- At any **detail report**, regardless of selection, click the  **Listing Cart** icon on the navigation bar to add the listing to the listing cart; or

Click the **Add** action on the action bar.


- To remove a listing from the cart, click the **Listing Cart** icon on the navigation bar again; or

Click the **Remove** action on the action bar.

### **To Edit a Listing**

1. In one-per-page format, click **Edit** at the action bar. (In multiple-per-page format, select a listing then click **Edit**.)
2. At the Edit dialog box, select the desired edit option then click **Continue**. See “Edit a Listing” on page 44.

### **To Add to Favorites**

- At any **detail report**, regardless of selection, click the  **star** icon on the navigation bar to select the listing as a favorite.
- To remove a listing from Favorites, click its gold star. The removal of color confirms the listing’s removal from Favorites.

### **To View the Results List**

- Click **List** at the action bar.

### **To Map the Listings**

- Click **Map** at the action bar.

### **To View Photos**

- To page through each photo displayed at the top left corner of a detail form, use the photo viewer’s **previous** and **next** navigation buttons. Each photo displays one at a time. To display a photo’s comment, if any, mouse over the photo.
- To display all the photos for a single property in the Photo dialog box, click any one of the photo viewer’s photos, or click **Photos** on the action bar.
- If you switch to the **Photo** dialog box when viewing a single property in a one-per-page format, all of the property’s photos display. If you switch when viewing



multiple properties at View, each property's primary photo displays. The **Photo** dialog box shows each property's primary photo with a checkbox.

- Any photo selected or deselected at the checkbox affects selections at the List, View, and Map pages and vice-versa.

### **To View Slide Shows**

1. Click **Slideshow** on the action bar.
2. When using a one-page format, all of the property's available photos display in the slide show.
3. When using a multi-page format, if you select more than one property, the slideshow displays the primary photo in each.
4. To navigate to a particular photo in a slide show, mouse over the current photo to show the navigation arrows. Click **right or left arrows** to move to the desired photo; or simply click the desired photo's thumbnail.
5. To close the slide show, click **Close** in the top right corner of the Slideshow dialog box.

### **To View Attachments**

At View, when a single listing displays in a one-per-page format (for example, Client Full, Flyer), a list of attachments may display at the top of the detail form. A paperclip icon displays in front of each attachment category or name. Standard Document categories are Agency Disclosure, Lead Paint Disclosure, Floor Plan, Survey, Property Condition Disclosure, Other 1, Other 2.

1. In one-per-page format, click an available attachment at the top of the page.
2. The **attachment** opens in a new window.
3. Click **Close** or **Cancel** to return to View.

#### **Note:**

Depending on your browser, you may see a download dialog box. Choose Open or Save as desired.

### **To View Links**

At View, when a single listing displays in a one-per-page format, a list of links may display at the top of the detail form. Links for listings include Virtual Tour, Video, Neighborhood Info, School Profiles, Schedule a Showing, and many other MLS-supplied links.

1. In one-per-page format, click an available link at the top of the page.
2. The **link** opens in a new window.
3. Click **Close** to return to View.

### ***To Get Driving Directions***

1. At the **View** page, navigate and select properties in the order that you want to travel.
2. Click **Directions** on the action bar.
3. At the **Driving Directions** dialog box, you may optionally click the **Move Up**, **Move Down**, and **Edit** buttons to re-order addresses for routing.
4. Zoom or move the map as needed.
5. To add another address to the list, click **Add**.
6. To customize your route, select **Avoid Traffic**, **Show listings on map**, and **Round-trip** checkboxes as needed.

### ***To View the Listing's History***

1. In one-per-page format, click **History** on the action bar.
2. The listing's History report opens in a new window. Select or deselect the **Hide Original Listing Data** checkbox, as desired. (See "About History" on page 234.)
3. Click **Close** to return to View.

# Mapped Listings

## About Mapping Listings

Use the Map action—from List or View—to see the results of your search as a fixed set of markers on a map. You can zoom and move the map as needed, mouse over a marker for pop-up details, and switch the map view from Road to Aerial (or Birds-Eye, when available).

At the action bar you can switch to List or View, and view Places (points of interest) and address Locations. A standard search results List displays beneath the map, allowing standard List actions.

To switch from a fixed set of markers to a full map search, open the dynamic criteria panel and select the Map Search checkbox. Once you select Map Search, the current map frame is the location, and can be moved. Beyond a distance determined by the MLS, searching is suspended, and you must zoom in to search the map. Map Search does not support archived listings.

## Work with Mapped Listings

Use the Map action—from List or View—to see the results of your search as a fixed set of markers on a map. You can zoom and move the map as needed, mouse over a marker for pop-up details, and switch the map view from Road to Aerial (or Birds-Eye, when available).

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### How . . .

#### *To See Mapped Results from a List Page*

Unlike results from a New search, the system does not limit Map to a display of selected results. When you view search results at Map, *all* listings display, not just those that are selected at List.

1. At any search results List—including My Lists—select the listings you want to view on a map, or select none if you want to view all at map.
2. Click **Map** on the action bar. The mapped listings display.

#### **Note:**

If the system can't display a particular listing at Map, that listing is flagged (!) in the List below the map.

#### *To See Mapped Results from View*

- At View in multiple-per-page format, click **Map** on the action bar. All listings display on the map.

#### *To Understand Markers*

Mapped listings display as markers on the map. They are numbered to match listings displayed in the search results list below the map.



Listing markers are assigned colors according to their status. To view the color legend, click Legend at the Map control.

#### ***To Move the Map Frame***


- At the **Map Search** page, drag the map or use the map control.

Hold down the left mouse button and drag the map in the desired direction; or


Click a **direction arrow** 

#### ***To Zoom In and Out***

*To zoom in* for a closer view:

- Click **zoom in** ; or
- Roll the mouse wheel forward; or
- Double click the map

*To zoom out* for a broader view:

- Click **zoom out** ; or
- Roll the mouse wheel backward

#### ***Note:***


The current zoom level displays in the lower right corner of the map. Beyond a distance your MLS specifies, searching is suspended, and you must zoom in to search the map.

### ***To Change Map Views***

Use the map control in the top left corner. Click one of the following to change the map view:



- **Road:** Street Map
- **Aerial:** Satellite photos
- **Birds Eye:** Aerial photos from four angles, not available at all locations

### ***To View the Listing Details Pop-up***

- To display a detail pop-up, hover the mouse pointer over the map marker.
- To select a property, click the **pop-up** checkbox.
- To view the property at the **Detail View** page, click the **ML#**.
-  To page through each available photo in a pop-up, use the **previous** and **next** buttons. To display the photos in the Photo dialog box click any one of the pictures.

### ***To Open and Close the Results List***

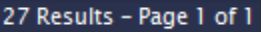
The results list opens automatically below the map.


- To close the list, click the  **Close Map List** arrow.
- To open the list, click the  **Open Map List** arrow.

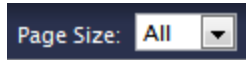
### ***To Shrink or Expand the Results List***

1. Mouse over the divider line between the map and list panels.
2. Wait for the cursor to change to a double arrow icon.
3. To show more of the map, drag the divider line down; to show more of the list, drag the divider line up.


### ***To Navigate the Results List Below the Map***


 The **page counter** shows the number of results and pages, including the current page's number.

 The **navigation buttons** allow you to navigate through each page. From left to right, the buttons represent First, Previous, Next, and Last.



The **Page Size dropdown list** allows you to set the number of rows displayed on a page: **20**, **50**, and **100**. To view all results on a single, scrolling page, choose **All**. Unless you change it, your Page Size selection remains in effect throughout your current session.

 On Map pages, the **Close Map List** button allows you to hide the results list in order to view a larger portion of the map. Alternatively, drag the divider between the map and list lower to see a larger map and smaller portion of the list.

 On Map pages, the **Open Map List** button restores the results list to the default height—or to a height you set by dragging the divider.


**Notes:**

In Map Search mode, any change in the size of the map frame causes a re-run of the search

In Map Search mode, results do not include archived listings

***To Switch to a Full Map Search Using the Dynamic Criteria Panel***


Once you switch to a full map search, the current map frame becomes the location, and can be moved.

1. To open the **dynamic criteria panel**, click  the white downward arrow at the far right of the title bar .
2. Select the **Map Search** checkbox to switch from a fixed set of markers to a full map search.

**Note:**

Beyond a zoom limit set by the MLS, searching is suspended, and you must zoom in to search the map.


***To Change Criteria Instantly at the Dynamic Criteria Panel***

1.  To open the **dynamic criteria panel**, if it is not already open on the right side of the page, click the **white downward arrow** at the far right of the title bar.
2. Choose or type criteria at any field, or add a field at the **Other Fields** dropdown list.

To draw a location using radius and polygon shapes, make sure the **Map Search**



checkbox at the top of the panel is selected. With Map Search selected, the location fields Town, Zip, Zone, County, and ML# are unavailable.

3.  To close the **dynamic criteria panel**, click the **white upward arrow** at the top of the open Panel .

#### ***To Return to the Criteria Page***

- Click **Revise Criteria** on the title bar.

#### ***To Draw a Radius***

1. Click **Radius** on the action bar.
2. Move the mouse pointer to the center point of the circle, then click to set the point.
3. Move the mouse to draw a line to the outside edge of the radius. The size of the radius increases as you move the mouse.
4. When the circle is the desired size, click the mouse to finish the circle.

#### ***To Draw a Polygon***

1. Click **Polygon** on the action bar.
2. Move the mouse pointer to the desired first point, then click to set the point.
3. Move the mouse to draw a line to the next location, then click to set the point.
4. Click at additional points as necessary.
5. To close the polygon, double-click the mouse.

#### ***To Save a Shape***

1. At the **Map** page, after drawing a shape, click **Save Shape** at the action bar.
2. At the **Save Shape** dialog box, enter a name for the shape, then click **Save**.

#### ***To Clear a Shape***

- At the **Map** page, click **Clear Shape** on the action bar.

#### ***To Use a Saved Shape***

1. At the **Map** page, click the down arrow to open the **Use Saved Shape** dropdown list, available on the action bar.
2. Choose the desired shape from the dropdown list.

## Display Places, Locations, and Directions

### *To Display Places (POI)*

1. At the **Map page**, click **Places** on the action bar.
2. At the **Show Places** dialog box, click one or more **Place** categories or enter a category not on the list.
3. To deselect a place category, click **Places** on the action bar, and at the dialog box clear checkboxes for the categories you don't want.
4. To clear all the categories from the map, click **Clear All**.

### *To Display Locations and Use Defaults*

1. At the **Map** page, click **Location** on the action bar.
2. At the **Locations** dialog box, choose the task you want.
  - **To find a location:** At the **Find a Location** text box, enter a full or partial you want to locate on the map, then click **Find**. The dialog box closes and the location is marked with a blue pushpin. To add more than one pushpin to the map, repeat these steps.
  - **To display details of the location:** mouse over a **pushpin** to view its **pop-up**.
  - **To select one or more saved locations:** At the **Saved Locations** list, click checkboxes to select saved locations to be used for a task.
  - **To set your default map location:** At the **Saved Locations** list, choose a saved location and click **Set as Default**.
  - **To go to your default map location:** Click **Go to Default**.
  - **To save the current location:** After finding a location, click **Save Current As**. Enter a name, then click **Save**.
  - **To delete a saved location:** At the **Saved Locations** list, use checkboxes to select one or more locations for deletion, then click **Delete**.

### *To Get Driving Directions*

1. At the **Map** page, select properties in the order you want to travel.
2. Click **Directions** on the action bar.
3. At the **Driving Directions** dialog box, you may optionally click the **Move Up**, **Move Down**, and **Edit** buttons to re-order addresses for routing.
4. Zoom or move the map as needed.
5. To add another address to the list, click **Add**.

6. To customize your route, click **Avoid Traffic**, **Show listings on map**, and **Round-trip** checkboxes as needed. Route displays on the map, followed by distance and driving directions.

***To Save a Map Search***

1. At the **Map** page, enter shapes and criteria as needed until the properties you want are displayed.
2. Click **Save Search** at the top of the dynamic criteria panel.



# Map Searches

## About Map Searches

You can start a new map search and use the map tools to define a location; or start by choosing a saved map location or shape. Display the map in Road, Aerial, or Bird's Eye view.

When performing a Map Search, the system dynamically finds matches as you zoom in and out, move the map, draw a shape to define the location, or change criteria at the dynamic criteria panel. You can display Places (points of interest) and address Locations. Center the map as needed.

Properties display as markers and in a results list below the map. If the map shows no markers, zoom in. Note: The system suspends searching at a zoom level your MLS has defined.

The marker's color reflects its status. To view a legend identifying marker colors, click Legend.

When listings are very close to one another, their markers may overlap. To display the listing details pop-up, mouse over the marker.

If you haven't defined a location or chosen a saved location or shape, your default map area displays. If you draw a polygon or radius to define the location, listing markers are confined to that shape. You can save the shape for later use, clear the shape, and choose a saved shape from a dropdown list.

Adjust criteria, if needed, at the dynamic criteria panel. See "Dynamic Criteria Panel" on page 69.

To see a larger portion of the map, hide the results list below it. Click the hide arrow at the top right of the list's navigation bar.

### **Notes:**

You can enter criteria at the dynamic criteria panel to the right of the map

Map Search does not display archived searches

If no markers display, look for zoom instructions below the map.

The system can't map listings that don't have a geocode. Such listings appear in the results list below the map, where an exclamation mark (!) symbol indicates they are not mapped.

## Start a Map Search

Use the Map Search tab to start a map search. When performing a Map Search, the system finds results dynamically as you zoom in and out, move the map, draw a shape to define the location, or change criteria at the dynamic criteria panel.

You can start a brand new map search and use the map tools to define a location; or start by choosing a saved location or shape. Center the map as needed.

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### How . . .

#### *To Enter Basic Criteria*

1. At the **Search Type** page, click the **Map Search** tab.
2. Choose one or more options for **Class**.
3. Choose **Available**, **Unavailable**, or both.
4. Choose one or more options for **Public/Private**: *Public listings* are MLS listings; *Private listings* are exclusive to your office.

#### *To Choose a Shape or Location*

1. Sort by the **Type** column to easily find the shape or location you want to start with.
2. Select the name of a location or shape then click **Continue**. Alternatively, you may double-click the name in order to open the map immediately.

#### *To Delete and Rename Shapes & Locations*

1. Select the shape or location you want to rename or delete. If you do not have permission to perform these actions, the Rename and Delete buttons are disabled.

To rename the shape or location, click **Rename**. Clear and enter a new name, then click **Rename**.

To delete the shape or location, click **Delete**. At the confirmation prompt, click **Delete**.

***To Share Saved Shapes & Locations***

1. Select the shape or location you want to share. If you are not the owner or are not otherwise permitted to perform this action, the Share button is disabled.
2. At the **Share Saved Location** dialog box, select **My Office** or **MLSLI**.
3. Click **Share**.



## Run Map Searches for Listings

Use the Map Search tab to start a map search. See “Run Map Searches for Listings”. When performing a Map Search, the system finds results dynamically as you zoom in and out, move the map, draw a shape to define the location, or change criteria at the dynamic criteria panel.

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### How . . .

#### *To Understand Markers*

Mapped listings display as markers on the map. They are numbered to match listings displayed in the search results list below the map.



Listing markers are assigned colors according to their status. To view the color legend, click Legend at the Map control.

#### *To Move the Map Frame*

- At the **Map Search** page, drag the map or use the map control.


Hold down the left mouse button and drag the map in the desired direction; or

Click a **direction arrow**



### ***To Zoom In and Out***

*To zoom in* for a closer view:

- Click **zoom in** ; or
- Roll the mouse wheel forward; or
- Double click the map

*To zoom out* for a broader view:

- Click **zoom out** ; or
- Roll the mouse wheel backward

#### **Note:**

The current zoom level displays in the lower right corner of the map. Beyond a distance your MLS specifies, searching is suspended, and you must zoom in to search the map.


### ***To Change Map Views***

Use the map control in the top left corner. Click one of the following to change the map view:

- **Road:** Street Map
- **Aerial:** Satellite photos
- **Birds Eye:** Aerial photos from four angles, not available at all locations



### ***To View the Listing Details Pop-up***

To display a detail pop-up for the properties returned by the search, hover the mouse pointer over the map marker.

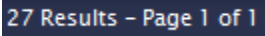
- At the pop-up, to select the property for use at List, View, Map, Photos, and the results list below the map, select the pop-up's checkbox. To deselect the property, clear the pop-up's checkbox.
- At the pop-up, to view the property at the **View** page, click the **ML#**.
-  To page through each available photo in a pop-up, use the **previous** and **next** buttons. To display all of the photos for a single property in the Photo dialog box, click any one of the photos.

### *To Open and Close the Results List*

The results list opens automatically below the map.

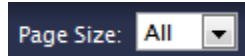
- To see a full-sized map, click the  **Close Map List** arrow .
- To see a full-size list, click the  **Open Map List** arrow.

### *To Navigate the Results List Below the Map*


 The **page counter** shows the number of results and pages, including the current page's number.




The **navigation buttons** allow you to navigate through each page. From left to right, the buttons represent First, Previous, Next, and Last.



The **Page Size dropdown list** allows you to set the number of rows displayed on a page: **20**, **50**, and **100**. To view all results on a single, scrolling page, choose **All**. Unless you change it, your Page Size selection remains in effect throughout your current session.

 On Map pages, the **Close Map List** button allows you to hide the results list in order to view a larger portion of the map. Alternatively, drag the divider between the map and list lower to see a larger map and smaller portion of the list.


 On Map pages, the **Open Map List** button restores the results list to the default height—or to a height you set by dragging the divider.

#### **Notes:**


In Map Search mode, any change in the size of the map frame causes a re-run of the search

In Map Search mode, results do not include archived listings

### *To Change Criteria Instantly at the Dynamic Criteria Panel*

1.  To open the dynamic criteria panel—if it is not already open—on the right side of the page, click the **white downward arrow** at the far right of the title bar.
2. Enter criteria at any field, or add a field at the **Other Fields** dropdown list.

To draw a location using radius and polygon shapes, make sure the **Map Search** checkbox at the top of the Dynamic Criteria panel is checked.

3.  To close the panel, click the white **upward arrow** at the top of the panel.

#### ***To Draw a Radius***

1. Click **Radius** on the action bar.
2. Move the mouse pointer to the center point of the circle, then click to set the point.
3. Move the mouse to draw a line to the outside edge of the radius. The size of the radius increases as you move the mouse.
4. When the circle is the desired size, click the mouse to finish the circle.

#### ***To Draw a Polygon***

1. Click **Polygon** on the action bar.
2. Move the mouse pointer to the first point of the polygon, then click to set the point.
3. Move the mouse to draw a line to the next location, then click to set the point.
4. Click at additional points as necessary.
5. To close the polygon, double-click the mouse.

#### ***To Save a Radius or Polygon***

1. At the **Map** page, after drawing a shape, click **Save Shape** at the action bar.
2. At the **Save Shape** dialog box, enter a name for the shape, then click **Save**.

#### ***To Clear a Radius or Polygon***

- At the **Map** page, click **Clear Shape** on the action bar.

#### ***To Use a Saved Radius or Polygon***

1. At the **Map** page, click the **down arrow** to open the **Use Saved Shape** dropdown list, available on the action bar.
2. Choose the desired shape from the dropdown list.

#### ***To Display Places (POI)***

1. At the map page, click **Places** on the action bar.
2. At the **Show Places** dialog box, click one or more **Place** categories or enter a category not on the list.

3. To deselect a place category, click **Places** on the action bar, and at the dialog box clear checkboxes for the categories you don't want.
4. To clear all place categories from the map, click **Clear All**.

### *To Display Locations and User Defaults*

1. At the **Map** page, click **Location** on the action bar.
2. At the **Locations** dialog box, choose the task you want.
  - **To Find a Location:** At the **Find a Location** text box, enter a full or partial . Click **Find**. The dialog box closes and the location is marked with a blue pushpin. To add more than one pushpin to the map, repeat these steps.
  - **To display more details:** mouse over a **marker** to view its **pop-up**.
  - **To select one or more saved locations:** At the **Saved Locations** list, select checkboxes to select saved locations to be used for a task.
  - **To set your default map location:** At the **Saved Locations** list, choose a saved location and click **Set as Default**.
  - **To go to your default map location:** Click **Go to Default**.
  - **To save the current location:** After finding a location, click **Save Current As**. Enter a name then click **Save**.
  - **To delete a saved location:** At the **Saved Locations** list, select checkboxes at locations you want to remove. Click **Delete**.

### *To Get Driving Directions*

1. At the **Map** page, click properties under the map in the order that you want to travel.
2. Click **Directions** on the action bar.
3. At the **Driving Directions** dialog box, you may optionally click the **Move Up**, **Move Down**, and **Edit** buttons to re-order addresses for routing.
4. Zoom or move the map as needed.
5. To add another address to the list, click **Add**.
6. To customize your route, click **Avoid Traffic**, **Show listings on map**, and **Round-trip** checkboxes as needed.

*To Save a Map Search*

1. At the **Map** page, enter shapes and criteria as needed until the properties you want are displayed.
2. Click **Save Search** at the top of the dynamic criteria panel.

# New Searches

## Start a New Search or Change Search Type

At New Search, you can start any type of search; proceed with a standard New Search or click one of the other search tabs (for example Map Search, Saved Searches, MLS# Search).

For the next steps in running a New search, See “About Search Criteria” on page 74 and “About Search Results” on page 80.

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### How . . .

#### *To Start a New Search*

1. On the **New Search** tab, choose one or more options for **Class**, **Availability**, **Public/Private**, and **Archives**.
2. To continue to the **Criteria** page where you can (1) choose a search form and (2) define criteria for the search, click **Continue**.

Field	Description
Class	Choose one or more listing Classes.
Availability	Choose whether your search is for available listings, unavailable listings, or both: <ul style="list-style-type: none"> <li>• <i>Available listings</i> are new or back on market. They may have had a price change or extension.</li> <li>• <i>Unavailable listings</i> are closed, expired, under contract, withdrawn, and rented.</li> </ul>
Public/Private	Choose whether your search is for Public (MLS) listings, Private listings, or both.
Archives	When a search includes Unavailable listings, you may include archived listings in the search. (Note: archived listings are not searchable at Map.) This requires that you choose no more than five towns in your location. You cannot choose a zip code, zone, or county, nor can you draw a shape if you map the results.

#### **Note:**

The ability to choose more than one option at a field depends on selected classes.



*To Choose a Different Type of Search*

- At the **Search Type** page, where the **New Search** tab opens by default, choose a different search tab.



# Save and Share Searches

## Saved and Shared Searches

Use the Saved Searches tab—at the Search Type page—to open a list of saved searches. The Saved Searches tab shows the columns Name, Shared By, and Modified. Sort any column by clicking the column heading.

- The *Name* column shows an alphabetized list of saved searches.
- The *Shared By* column shows your name if you saved the search; shows the name of another member who has shared a saved search with your office; or shows no name if no one has shared the saved search with your office.
- The *Modified* column shows the date and time that the saved search was last modified.

---

### How . . .

#### *To Start a Saved Search*

1. At the **Listings Search Type** page, click the **Saved Searches** tab.
2. Click to select a search. Take note of the selected Class, Availability, Public/Private, and Archives selections.
3. Click **Continue** to proceed to the Criteria page; or to open the saved search immediately, double-click the one you want to run.
4. At the **Criteria** page, enter search criteria.

#### *To Sort the List of Saved Searches*

1. Click a column heading (Name, Shared By, Modified) to sort in ascending order.
2. Click again to sort in descending order.

***To Delete and Rename a Saved Search***

1. Click to select the search you want to rename or delete. If you do not have permission to perform these actions, the Rename and Delete buttons are disabled.
  - To rename the search, click **Rename**. Clear and enter a new name, then click **Rename** again.
  - To delete the search, click **Delete**. At the confirmation prompt, click **Delete** again.

***To Share a Saved Search***

1. Click to select the saved search you want to share.
2. Click **Share**. Note: If you are not the owner or are not otherwise permitted to perform this action, the Share button is disabled.
3. At the **Share Saved Search** dialog box, click **My Office**.
4. Click **Share**.



# Pre-Defined Searches

## Run Pre-Defined Searches

Use the Listings Pre-Defined Searches tab to start a pre-defined search for Addresses, Just Expired, and other common searches. These frequent searches use forms that require minimal data entry.

Because the MLS defines pre-defined searches, you cannot save them with your own changes. You can, however, save a pre-defined search as a new search with a unique name.

When saving changes, if you *do not* make changes to the pre-defined Class, Availability, Public/Private, , or Archives, the saved search displays in the Saved Search list but opens with the pre-defined search form. If you *do* make changes at these fields, the saved search opens with the appropriate Quick Search or Flex Search form.

---

### How . . .

#### *To Run a Pre-Defined Search for Listings*

1. At the **New Search** page, choose the **Pre-Defined Searches** tab.
2. Select a search, adjust basic criteria where enabled, then click **Continue**; or, double click to open the search form without changes.
3. At the **Criteria** page, enter criteria then click **Continue**.

#### *To Sort the List of Pre-Defined Searches*

1. Click the **Name** column heading once to sort in alphabetical order.
2. Click again to sort in reverse alphabetical order.



# MLS Number Searches

## Run an MLS Number Search

Use the **MLS# Search** tab at the **New Search** page to search for one or more listings by their **ML#**. Before you submit the **MLS# Search**, you may save the search, making it available at **Saved Searches**.

---

### How . . .

#### *To Run an MLS# Search*

1. At the **New Search** page, click the **MLS# Search** tab.
2. Enter one or more **ML numbers** in the text area. Separate each number by a comma, space, or line break.
3. Click **Continue**.
4. At the **Results (List)** page, search results display for each **ML#** entered.

#### *To Save the MLS# Search Before You Run It*

1. After entering your list of **MLnumbers**, click **Save Search**.
2. At **Name**, enter a name for the search.
3. Click **Save**. The dialog box closes.
4. At the **MLS# Search** tab, click **Continue**.

# Open Houses

## About Open House & Calendar

You can display open houses scheduled for listings in your Market Areas, in List and Calendar formats. Access the Open House List at Info Center.

Choose Broker Open Houses and/or Consumer Open Houses at Settings, using the Market Area tab. When open houses of the type you select are scheduled, the Info Center alert displays below Today's Listings.

## Work with the Open House List & Calendar

Before you can track and display open houses, add Calendar settings at the Market Areas tab at the main-menu option, Settings. There you may choose to display broker and/or consumer open houses.

When alerted to open houses at Info Center, view the desired types in List and Calendar formats.

Toggle between List and Calendar as needed. Use List to sort, narrow, and group open houses.

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### How . . .

#### *To Set Up Your Open House Display*

1. At **Settings**, click **Market Areas**.
2. At the **Market Areas** page, scroll down to **Calendar**.
3. Select either or both options to track and display **Broker Open Houses** and/or **Consumer Open Houses** in your market areas.
4. Click **Save**.

#### *To View a List of Scheduled Open Houses*

1. Click **Info Center** on the main menu.
2. At **Alerts**, click **Show Open Houses**, if available.

#### *To Work with the List of Scheduled Open Houses*

Open houses are grouped by date.

**Toggle between List and Calendar:** Click Calendar or List on the action bar

**Narrow open houses on Calendar:** At List, select desired listings only

**Sort open houses:** Click any column heading to sort in ascending order, within each group; click again to sort in descending order.

***To View Open Houses in Calendar View***

1. Click **Info Center** on the main menu.
2. At **Alerts**, click **Show Open Houses**, if available.
3. Click **Calendar** on the action bar.

***To View the Open House Listing in Detail View***

**At the Open House List:** Click the listing you want to view in detail view

**At the Open House Calendar:** Click the open house entry to view the associated listing in detail view

# Public Records Searches

## About Public Records Searches

Stratus MLS's Public Records Search feature lets you find tax record, mortgage, deed, property characteristics, and related information for over 1.6 million properties in Nassau, Suffolk, Queens and Kings/Brooklyn Counties.

The system offers a number of ways to search, save and share searches, as well as collect, map, download, and work with results.

At any public records search form, enter or select search text for any field and add more fields, if desired, from the Other Fields dropdown list.

Searching public records is very similar to searching Listings. The action and site action bars provide the same functionality.

### Choose a Public Records Search Type

**New Searches** A search form presents a set of commonly-searched public records fields. Available search forms include Quick and Flex.

**Map Searches** Locate listings on a map. Listings show as colored markers in the geographic location that you either define in criteria or draw on the map, and in column format below the map. Start by selecting a saved shape or location, making certain that your selection is located within the chosen County.

**Saved Searches** Selection of your own saved public records searches, as well as those shared by others in your office. When selected, the saved search opens showing all saved criteria.

**Pre-Defined Searches** Pre-Defined Templates for the most commonly-used public records searches, requiring minimal data entry. Find Deeds & Mortgages, Lis Pendens, Owner's Name, and Property Address search forms here.

**Links Searches** Choose CASS forms for bulk mailing, or start interactive tax map searches for Queens/Brooklyn, Suffolk, and Nassau.



## Enter Public Records Search Criteria

When performing New Search, Saved Searches, and Pre-Defined Searches for public records, you must choose characteristics for the properties you want to find. To do so, enter or select search criteria at relevant fields.

The default search form is suitable for the county or counties you selected. You can change the search form if needed.

---

### How . . .

#### ***To Change a Public Records Search Form***

1. At the **Search Forms dropdown list**, choose the form you want:

**Quick Search form:** To search by property characteristics with the option to add Owner's Name, Property Address & Parcel ID, and Deeds and Mortgages, use the Quick Search form. Enter or select values at any field; add more fields as needed from the Other Fields dropdown list.

**Flex Search form:** To customize a form, use the Flex Search form. In order to build a search, choose more fields from the Other Fields dropdown list.

**Pre-Defined Search form:** Available for Pre-Defined searches. These search forms have a limited number of fields that are relevant to the chosen pre-defined search. Options include Deeds & Mortgages, Lis Pendens, Owner's Name, and Property Address.

2. Enter criteria.

#### ***To Enter Criteria at Various Field Types***

- Select an option at *dropdown lists* (for example, Owner Last starts w/) then enter all or part of a *text value*. To enter more than one text value, click the Or button. To exclude options click the Not checkbox.
- Select one or more options at *multi-select lists* (for example, Property Description) or exclude options with the Not checkbox. To choose more than one option, Ctrl+Click each one you want.

- Type a range of values at *Min/Max fields* (for example, Mortgage Amount from 150000 to 200000).

#### ***To Exclude Values with NOT***

1. Click the **Not** checkbox at the desired field.
2. Select or enter the value(s) you want to exclude from results.

#### ***To Add More Fields to the Search Form***

1. Click the **Other Fields dropdown list** at the bottom of the search form.
2. Select a field.
3. Choose—or enter—criteria as needed.

#### ***To Preview the Search***

1. Enter desired search criteria.
2. Click **Preview** on the action bar.
3. At the criteria summary, review how each search statement reduces the count of results the search will find.
4. Click **Close** to return to the Search Criteria page.

#### ***To Count Results On the Fly***

- As you enter criteria, a **counter** on the action bar dynamically updates the number of results .

#### ***To Save and Share the Search***

1. Click **Save Search** on the action bar.
2. Enter a **name**, and click **Save**.

To save changes to a previously-saved search, click **Save Search** on the action bar, then click **Save As**, enter a **name**, and click **Save**.

To save a copy of another owner's search with changes, click **Save Search** on the action bar, then click **Save As** and **name** the search. Search assigns you ownership of the new copy.

3. To share a saved search, click **My Office** or **MLS LI**. When you have made your selection, click **Share**.

***To Clear Criteria***

- Click **Clear** on the action bar.

***Note:***

To clear a map shape, switch to **Criteria Map**, then click **Clear** on the action bar.

***To Submit the Search***

1. After entering criteria, click **Submit** at the top or bottom of the page.
2. Results display at the **List** page.

## Enter Public Records Search Criteria in Map Format

To restrict the public records location and view results on a map, you can draw a radius or polygon shape from the Criteria Map Format page. Finding public records located in map format is just like finding listings.

When you submit a search with a shape, results display at the Map Search page instead of the Results (List) page. See “Public Records - Map Search Page”.

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### How . . .

#### *To Use the Map to Draw a Shape*

1. At the **Criteria page**, click the **Map** action. The **Criteria Map format page** displays.
2. Move and zoom the map so the desired location is visible.
3. Click **Polygon** or **Radius**, then draw the shape.

#### *To Draw a Radius*

1. Click **Radius** on the action bar.
2. Move the mouse pointer to the center point of the circle, then click to set the point.
3. Move the mouse to draw a line to the outside edge of the radius. The size of the radius increases as you move the mouse.
4. When the circle is the desired size, click the mouse to finish the circle.

#### *To Draw a Polygon*

1. Click **Polygon** on the action bar.
2. Move the mouse pointer to the first point of the polygon, then click to set the point.
3. Move the mouse to draw a line to the next location, then click to set the point.
4. Click at additional points as necessary.
5. To close the polygon, double-click the mouse.

## Start a New Public Records Search or Change Search Type

Use the Public Records New Search tab to start a new search or change the search type.

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### How . . .

#### *To Start a New Search for Public Records*

1. At the **New Search** tab, click to choose one or more **County** options. If you don't choose at least one county, all are searched.
2. Click **Continue**. The **Criteria** page displays in the default search form. Note: If you choose more than one county, field dropdown lists include choices for all those selected. See "Public Records Criteria Page".

#### *To Choose a Different Type of Public Records Search*

- At the **Search Type** page, where **New Search** opens by default, click the tab for the desired search: "Run Public Records Map Searches" on page 134, "Run Public Records Saved Searches" on page 140, "Run Public Records Pre-Defined Searches" on page 142, or "Open Public Records Links" on page 143.

## Run Public Records Map Searches

Use the Public Records Map Searches tab to start a map search for public records. When the map page opens, your default map area—or a selected shape or location—displays in the map frame.

The system shows matching public records as markers within the map frame and lists them below the map. When public records are very close to one another, their markers may overlap. To display the public record details pop-up, mouse over the marker.

The current map frame is the location, and can be moved. Zoom in or narrow search criteria if the map returns no results. If you draw or select a polygon or radius to define the location, public record markers are limited to that shape. To see a larger portion of the map, hide the results list below it. Click the hide down arrow at the top right of the list's navigation bar.

Adjust criteria, if needed, at the “Dynamic Criteria Panel” on page 69

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### How . . .

#### *To Start a Map Search for Public Records*

- To continue directly to the Map page, click **Continue**. Or; To start with a shape or location, see below.

#### *To Start with a Shape or Location*

1. On the **Public Records Map Search** tab, sort the list as desired.
2. Click to select the name of a location or shape, then click **Continue** to open the map. Alternatively, double-click the shape or location you want to open it directly.

#### **Note:**

To insure results, make sure your location or shape is located in the selected county.

***To Sort the List of Shapes and Locations***

1. On the **Public Records Map Search** tab, click a column heading (Name, Type, Shared By, Modified By) to sort in alphabetical (ascending) order.
2. Click again to resort in reverse alphabetical (descending) order.

***To Delete and Rename Shapes & Locations***

1. On the **Public Records Map Search** tab, click the **shape** or **location** you want to rename or delete. If you do not have permission to perform these actions, the Rename and Delete buttons are disabled.
2. To rename the shape or location, click **Rename**. Clear and enter a new name, then click **Rename** again. To delete the shape or location, click **Delete**. At the confirmation prompt, click **Delete** again.

***To Share Saved Shapes & Locations***

1. On the **Public Records Map Search** tab, click the shape or location you want to share.
2. Click **Share**.

***Note:***

If you are not the owner or are not otherwise permitted to perform this action, the Share button is disabled.

***To Set a Shape or Location as the Default Map***

1. On the **Public Records Map Search** tab, click the shape or location you want to set as your default start point.
2. Click **Set as Default**.
3. Click **Continue** to view the location or shape on the map.

***To Move the Map Frame***

- At the **Map Search** page, drag the map or use the map control.


Hold down the left mouse button and drag the map in the desired direction; or

Click a **direction arrow**



### **To Zoom In and Out**

To *zoom in* for a closer view:

- Click **zoom in** ; or
- Roll the mouse wheel forward; or
- Double click the map

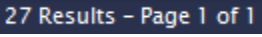
To *zoom out* for a broader view:


- Click **zoom out** ; or
- Roll the mouse wheel backward

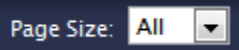
#### **Note:**


The current zoom level displays in the lower right corner of the map. Beyond a distance your MLS specifies, searching is suspended, and you must zoom in to search the map.


### **To Navigate the Results List Below the Map**

 The **page counter** shows the number of results and pages, including the current page's number.

 The **navigation buttons** allow you to navigate through each page. From left to right, the buttons represent First, Previous, Next, and Last.

 The **Page Size dropdown list** allows you to set the number of rows displayed on a page: **20**, **50**, and **100**. To view all results on a single, scrolling page, choose **All**. Unless you change it, your Page Size selection remains in effect throughout your current session.

 On Map pages, the **Close Map List** button allows you to hide the results list in order to view a larger portion of the map. Alternatively, drag the divider between the map and list lower to see a larger map and smaller portion of the list.

 On Map pages, the **Open Map List** button restores the results list to the default height—or to a height you set by dragging the divider.



**Notes:**

In Map Search mode, any change in the size of the map frame causes a re-run of the search


In Map Search mode, results do not include archived listings

**To Change Map Views**

Use the map control in the top left corner. Click one of the following to change the map view:

- **Road:** Street Map
- **Aerial:** Satellite photos
- **Birds Eye:** Aerial photos from four angles, not available at all locations

**To View the Public Record Details Pop-up**

- To display a **detail pop-up** containing the parcel ID, address, owner, sold price, taxes, and other information pertinent to the public record, hover the mouse pointer over the map marker .
- To select a public record for **List, View, Map, Photos**, and the **results** below the map, click the pop-up checkbox.
- To view the public record at the **Detail View** page, click the **ID#**.
-  To page through each available photo in a pop-up, use the **previous** and **next** buttons. To display all of the photos for a single property in the **Photo** dialog box— if more than one- click any one of the pictures.

**To Draw a Shape**

1. At the **Map** page, move and zoom the map so the desired area is visible.
2. Click **Polygon** or **Radius**, then draw the shape.

**To Draw a Radius**

1. Click **Radius** on the action bar.
2. Move the mouse pointer to the center point of the circle, then click to set the point.
3. Move the mouse to draw a line to the outside edge of the radius. The size of the radius increases as you move the mouse.
4. When the circle is the desired size, click the mouse to finish the circle.

### ***To Draw a Polygon***

1. Click **Polygon** on the action bar.
2. Move the mouse pointer to the first point of the polygon, then click to set the point.
3. Move the mouse to draw a line to the next location, then click to set the point.
4. Click at additional points as necessary.
5. To close the polygon, double-click the mouse.

### ***To Save a Shape***

1. At the **Map** page, after drawing a shape, click **Save Shape** at the action bar.
2. At the **Save Shape** dialog box, enter a name for the shape, then click **Save**.

### ***To Clear a Shape***

- At the **Map** page, click **Clear** on the action bar.

### ***To Use a Saved Shape***

At the **Map** page, click the **down arrow** to open the **Use Shape** dropdown list, available on the action bar.

Choose the desired shape from the dropdown list.

### ***To Display Places (POI)***

1. At the **Map** page, click **Places** on the action bar.
2. At the **Show Places** dialog box, click one or more Place categories or enter a category not on the list.
3. To deselect a place category, click **Places** on the action bar, and at the dialog box clear checkboxes for the categories you don't want.
4. To clear all the categories from the map, click **Clear All**.

### ***To Display Locations and Use Defaults***

1. At the **Map** page, click **Location** on the action bar.
2. At the **Locations** dialog box, choose the task you want.
  - **To find a location:** At the **Find a Location** text box, enter the address, zip, and/or town you want to locate on the map, then click **Find**. The dialog box closes and the

location is marked with a blue pushpin. To add more than one pushpin to the map, repeat these steps.

- ***To display the street address, town, state, and zip code:*** mouse over a pushpin to view its pop-up.
- ***To select one or more saved locations:*** At the **Saved Locations** list, select checkboxes at saved locations to be used for a task.
- ***To set your default map location:*** At the **Saved Locations** list, choose a saved location and click **Set as Default**.
- ***To go to your default map location:*** Click **Go to Default**.
- ***To save the current location:*** After finding a location, click **Save Current As**. Enter a name then click **Save**.
- ***To delete a saved location:*** At the **Saved Locations** list, select checkboxes, at one or more locations, for deletion. Click **Delete**.

#### ***To Get Driving Directions***

1. At the **Map** page, click properties under the map in the order that you want to travel.
2. Click **Directions** on the action bar.
3. At the **Driving Directions** dialog box, you may optionally click the **Move Up**, **Move Down**, and **Edit** buttons to re-order addresses for routing.
4. Zoom or move the map as needed.
5. To add another address to the list, click **Add**.
6. To customize your route, select **Avoid Traffic**, **Show listings on map**, and **Round-trip** checkboxes as needed.

#### ***To Save a Map Search***

1. At the **Map** page, enter shapes and criteria as needed until the public records you want are displayed.
2. Click **Save Search** at the top of the “Dynamic Criteria Panel” on page 69.

## Run Public Records Saved Searches

Use the Public Records Saved Searches tab to open a list of saved searches.

The Saved Searches tab shows the columns “Name”, “Shared By”, and “Modified”. All columns may be sorted by clicking the column heading.

- The Name column shows an alphabetized list of saved searches.
- The Shared By column shows the name of the member who has shared a saved search with your office; or shows no name if no one has shared the saved search with your office.
- The Modified column shows the date and time that the saved search was last modified.

---

### How . . .

#### *To Start a Saved Search*

1. At the **public records Search Type** page, click the **Saved Searches** tab.
2. Click to select a search. Take note of the selected County, then click **Continue**; or

To open the saved search immediately, double-click the one you want to run.

3. At the **public records Criteria** page, enter search criteria. (See “Enter Public Records Search Criteria” on page 129)

#### *To Sort the List of Saved Searches*

1. Click a column heading (**Name**, **Shared By**, **Modified**) to sort in ascending order.
2. Click again to sort in reverse alphabetical order.

***To Delete and Rename Saved Searches***

1. Click to select the search you want to rename or delete. If you do not have permission to perform these actions, the Rename and Delete buttons are disabled.
  - To rename the search, click **Rename**. Clear and enter a new name, then click **Rename** again.
  - To delete the search, click **Delete**. At the confirmation prompt, click **Delete** again.

***To Share Saved Searches***

1. Click to select the saved search you want to share. If you are not the owner or are not otherwise permitted to perform this action, the Share button is disabled.
2. At the **Share Saved Search** dialog box, click **My Office** or **MLSLI**.
3. Click **Share**.

## Run Public Records Pre-Defined Searches

Use the Public Records Pre-Defined Searches tab to start a pre-defined search for Deeds & Mortgages, Lis Pendens, Owner's Name, and Property Address. These frequently used public records searches require minimal data entry.

---

### How . . .

#### *To Run a Pre-Defined Search for Public Records*

1. At the **Public Records search type** page, click **Pre-Defined Searches**.
2. Select one or more **County** checkboxes.
3. Click a search, then click **Continue**. The Criteria page opens for field entry.
4. At the **Criteria** page, enter criteria then click **Continue**.

#### **Note:**

If you double click a pre-defined search, the search form opens immediately using default options for the selected County option(s).

#### *To Sort the list of Pre-Defined Searches*

1. Click the **Name** column heading once to sort in alphabetical order.
2. Click again to sort in reverse alphabetical order.

## Open Public Records Links

Use the Public Records Links tab to print CASS forms for bulk mailings or to search tax maps for Queens/Brooklyn, Suffolk, and Nassau counties.

Click any link to open the corresponding resource in a new window.

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### How . . .

#### *To Print CASS Forms for Bulk Mailing*

1. At the **Public Records search type page**, click **Links**.
2. Click **CASS Forms**.
3. Click the desired form. The form opens in a new window.
4. At the new window, print the corresponding **CASS Certification Form** and bring it to the Post Office with your bulk mailing. Check with your local Post Office for rates and requirements.

#### *To Run Tax Map Searches for Queens/Brooklyn*

1. At the **Links tab**, click **Queens/Brooklyn**. The interactive tax map displays in a new window.
2. To get information on the use of the tax map, click the **? Help** button.
3. To return to Stratus MLS, click **Close** on the new window.

#### *To Run Tax Map Searches for Suffolk*

1. At the **Links tab**, click **Suffolk**. Tax Map resources display in a new window.
2. To search by Address, Owner's Name, Phone, or Ad/Tax ID/Folio, click the **Searches menu option**.
3. At the search criteria form, select or enter text as needed, then click **Search**.
4. For further information, click the **FAQ** link.

***To Run Tax Map Searches for Nassau***

1. At the **Links tab**, click **Nassau**. Tax Map resources display in a new window.
2. To get information on the use of the tax map, click **? Help**.
3. To return to Stratus MLS, click **Close** on the new window.



## Map Properties From Public Records

Use the Map action—from List or View—to see the results of your search as a fixed set of markers on a map. You can zoom and move the map as needed, mouse over a marker for pop-up details, and switch the map view from Road to Aerial or Birds-Eye.

At the action bar you can switch to List or View, and view Places (points of interest) and address Locations. A standard search results List displays beneath the map, allowing standard List actions and a switch to List or View.

To switch from a fixed set of markers to a full map search, open the dynamic criteria panel and select the Map Search checkbox. Once you select Map Search, the current map frame is the location, and can be moved. Beyond a five mile limit, searching is suspended, and you must zoom in to search the map.

---

### How . . .

#### *To Share Saved Shapes & Locations*

1. On the **Public Records Map Search tab**, click the shape or location you want to share.
2. Click **Share**. If you are not the owner or are not otherwise permitted to perform this action, the Share button is disabled.

#### *To Set a Shape or Location as the Default Map*

1. On the **Public Records Map Search tab**, click the shape or location you want to set as your default start point.
2. Click **Set as Default**.
3. Click **Continue** to view the location or shape on the map.

### ***To Move the Map Frame***


- At the **Map Search page**, drag the map or use the map control.

Hold down the left mouse button and drag the map in the desired direction; or


Click a **direction arrow** 

### ***To Zoom In and Out***

*To zoom in* for a closer view:

- Click **zoom in** ; or
- Roll the mouse wheel forward; or
- Double click the map

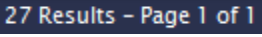
*To zoom out* for a broader view:


- Click **zoom out** ; or
- Roll the mouse wheel backward

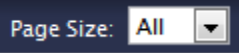
#### ***Note:***


The current zoom level displays in the lower right corner of the map. Beyond a distance your MLS specifies, searching is suspended, and you must zoom in to search the map.


### ***To Navigate the Results List Below the Map***

 The **page counter** shows the number of results and pages, including the current page's number.

 The **navigation buttons** allow you to navigate through each page. From left to right, the buttons represent First, Previous, Next, and Last.

 The **Page Size dropdown list** allows you to set the number of rows displayed on a page: **20**, **50**, and **100**. To view all results on a single, scrolling page, choose **All**. Unless you change it, your Page Size selection remains in effect throughout your current session.

 On Map pages, the **Close Map List** button allows you to hide the results list in order to view a larger portion of the map. Alternatively, drag the divider between the map and list lower to see a larger map and smaller portion of the list.

 On Map pages, the **Open Map List** button restores the results list to the default height—or to a height you set by dragging the divider.

**Notes:**

In Map Search mode, any change in the size of the map frame causes a re-run of the search


In Map Search mode, results do not include archived listings

**To Change Map Views**

Use the map control in the top left corner. Click one of the following to change the map view:

- **Road:** Street Map
- **Aerial:** Satellite photos
- **Birds Eye:** Aerial photos from four angles, not available at all locations

**To View the Public Record Details Pop-up**

- To display a detail **pop-up** containing the parcel ID, address, owner, sold price, taxes, surrounding properties, and other information pertinent to the public record, hover the mouse pointer over the map marker .
- To select a public record for List, View, Map, Photos, and the results below the map, click the pop-up checkbox.
- To view the public record at the **Detail View** page, click the **ID#**.
-  To page through each available photo in a pop-up, use the previous and next buttons. To display all of the photos for a single property in the Photo dialog box—if more than one- click any one of the pictures.

**To Draw a Shape**

1. At the **Map** page, move and zoom the map so the desired area is visible.
2. Click **Polygon** or **Radius**, then draw the shape.

### ***To Draw a Radius***

1. Click **Radius** on the action bar.
2. Move the mouse pointer to the center point of the circle, then click to set the point.
3. Move the mouse to draw a line to the outside edge of the radius. The size of the radius increases as you move the mouse.
4. When the circle is the desired size, click the mouse to finish the circle.

### ***To Draw a Polygon***

1. Click **Polygon** on the action bar.
2. Move the mouse pointer to the first point of the polygon, then click to set the point.
3. Move the mouse to draw a line to the next location, then click to set the point.
4. Click at additional points as necessary.
5. To close the polygon, double-click the mouse at the last point.

### ***To Save a Shape***

1. At the **Map** page, after drawing a shape, click **Save Shape** at the action bar.
2. At the **Save Shape** dialog box, enter a name for the shape, then click **Save**.

### ***To Clear a Shape***

- At the **Map** page, click **Clear** on the action bar.

### ***To Use a Saved Shape***

1. At the **Map** page, click the **down arrow** to open the **Use Shape** dropdown list, available on the action bar.
2. Choose the desired shape from the dropdown list.

### ***To Display Places (POI)***

1. At the **Map** page, click **Places** on the action bar.
2. At the **Show Places** dialog box, click one or more **Place** categories or enter a category not on the list.
3. To deselect a place category, click **Place** on the action bar, and at the dialog box clear checkboxes for the categories you don't want.
4. To clear all the categories from the map, click **Clear All**.

### ***To Display Locations and Use Defaults***

1. At the **Map** page, click **Location** on the action bar.
2. At the **Locations** dialog box, choose the task you want.
  - **To find a location:**At the Find a Location text box, enter the address, zip, and/or town you want to locate on the map, then click Find. The dialog box closes and the location is marked with a blue pushpin. To add more than one pushpin to the map, repeat these steps.
  - **To display the street address, town, state, and zip code,** mouse over a pushpin to view its pop-up.
  - **To select one or more saved locations:** At the Saved Locations list, click checkboxes to select saved locations to be used for a task.
  - **To set your default map location:** At the Saved Locations list, choose a saved location and click Set as Default.
  - **To go to your default map location:** Click Go to Default.
  - **To save the current location:** After finding a location, click Save Current As. Enter a name then click Save.
  - **To delete a saved location:** At the Saved Locations list, click checkboxes to select one or more locations for deletion. Click Delete.

### ***To Get Driving Directions***

1. At the **Map** page, click properties under the map in the order that you want to travel.
2. Click **Directions** on the action bar.
3. To re-order addresses for routing, at the **Driving Directions** dialog box, you may optionally click the **Move Up**, **Move Down**, and **Edit** buttons .
4. Zoom or move the map as needed.
5. To add another address to the list, click **Add**.
6. To customize your route, click **Avoid Traffic**, **Show listings on map**, and **Round-trip** checkboxes as needed.

### ***To Save a Map Search***

1. At the **Map** page, enter shapes and criteria as needed until the items you want are displayed.
2. Click **Save Search** at the top of the “Dynamic Criteria Panel” on page 69.

## View Public Records Detail Forms

At the List or Map page, use the View action to display the details for all or selected public records. A public records detail form can display in one-per-page format (for example Full w/Photo, Owner) or multiple-per-page format (for example Thumbnail). A detail form can display in one-per-page format (for example Client Full, Flyer) or multiple-per-page format (for example Comparison, Consumer Thumbnail).

In Detail View you can choose a detail form, page through the public records, open available links, download public records, and more. You can return to the Criteria page to revise your criteria and re-submit your search.

To switch from Detail View to List or Map use the action bar. At the action bar you can also view photos and slide shows, and get Directions.

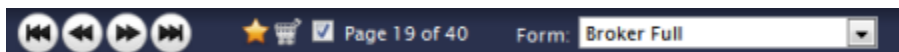
If the public record is associated with a listing and the listing link is available, you can view the listing's Broker Full detail form.


If you choose the View action without first selecting results at List, Map, or Photos, the Detail View page displays the first of *all* the public records. Use the navigation buttons to page through the public records.

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### How . . .

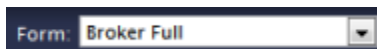
#### *To Navigate in Detail View*



 Page 1 of 70 The **page counter** shows the number of results currently available for detail view, including the current result's number. A check in the checkbox indicates that the public record is selected. To deselect the viewed public record, clear the checkbox.

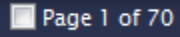


The **navigation buttons** allow you to page through the detail forms. From left to right, the buttons represent First, Previous, Next, and Last.



The **Form dropdown list** allows you to select a detail form.

***To Select Public Records in Detail View***

 To select public records while viewing each in a one-per-page form, click the page control checkbox in the page counter. Click again to clear the checkbox. To select public records while viewing multiple-list forms (for example, thumbnail forms) the checkbox displays in the top right corner of each public record.

To view all public records, leave all unselected. The system interprets the selection of none, as all.

***To Choose a Form in Detail View***

1. At the **View** page, open the **Form** dropdown list.
2. Click the desired form. The newly-selected form becomes your default until you choose a different form.

***To Return to the Results List Page***

- Click **List** at the action bar.

***To Map the Public Records***

- Click **Map** at the action bar. See “Public Records Mapped Page”.

***To Locate and Map Surrounding Properties***

The link, **Locate Surrounding Properties**, available in any one-per-page detail view when the property has latitude and longitude values, opens the map search page and shows properties nearby.

1. At a one-per-page detail form showing a public record with longitude and latitude values, click the link, **Locate Surrounding Properties**.
2. The **Map Search** page opens showing no more than 300 properties. The originating property displays in the center of the map.
3. If desired, you can narrow the displayed the results. Either change criteria at the “Dynamic Criteria Panel” on page 69, or draw a “Run Public Records Map Searches” on page 134.

***To View History***

1. Scroll to the bottom of any public record to the **Listing History** section.
2. To view a current or historical listing, click the desired ML#.

### **To View Photos**



To page through each photo displayed at the top left corner of a detail report, use the photo viewer's previous and next navigation buttons. Each photo displays one at a time. To display a photo's comment, if any, mouse over the photo.

To display all the photos for a single property in the Photo dialog box, click any one of the photo viewer's photos, or click Photos on the action bar.

If you switch to the Photo dialog box when viewing a single property in a one-per-page format, all the property's photos display. If you switch when viewing multiple properties in View, as in a thumbnail form, each property's primary photo displays. The Photo dialog box shows each property's primary photo with a checkbox. See "Photos Dialog".

Any photo selected or deselected at the checkbox affects selections at the List, View, and Map pages and vice-versa.

### **To View Slide Shows**

1. Click **Slideshow** on the action bar.
2. When in a one-page format, all of the property's available photos display in the slide show.
3. In a multi-page format, select more than one property.
4. To navigate to a particular photo in a slide show, mouse over the current photo to show the navigation arrows. Click right or left arrows to move to the desired photo; or simply click the desired photo.
5. To close the slide show, click **X** in the top right corner of the Slideshow dialog box.

### **To View Links**

1. In one-per-page format, click an available link at the top of the page. Links for public records include Building Footprint, My Nassau Property, and Tax Map.
2. The link opens in a new window.
3. Click **Close** to return to Detail View.

### **To Get Driving Directions**

1. At the **View** page, navigate and select properties in the order that you want to travel.
2. Click **Directions** on the action bar.
3. At the **Driving Directions** dialog box, you may optionally click the **Move Up**, **Move Down**, and **Edit** buttons to re-order addresses for routing.
4. Zoom or move the map as needed.



5. To add another address to the list, click **Add**.
6. To customize your route, select **Avoid Traffic**, **Show listings on map**, and **Round-trip** checkboxes as needed.

***To Return to the Criteria Page***

- Click **Revise Criteria** on the title bar.

## Run a Public Records Bulk Download

Use the Bulk Download dialog box—from the site action Download at the Criteria page—to download up to 15,000 public records in .csv format. The dialog box displays the exact count of items that will be downloaded in a single file.

Bulk downloads are useful for spreadsheet and database applications, for mailing labels, and so forth. The Bulk Download bypasses the creation of a search results list, instead displaying the Open or Save dialog box.

To insure the desired columns are included in the download, choose the appropriate column set from the Column Set dropdown list:

- Default column set with County name;
- Property Addresses named Bulk Download - PA;
- Mailing Addresses named Bulk Download - MA;
- Property & Mailing Addresses named Bulk Download - PM.

To include column names as the first row in the downloaded file, select the provided checkbox. Clear the checkbox to exclude column names in the downloaded file.

To start the download, click Download. You are prompted to open the file or save it to disk.

# My Lists

## Favorite Listings

You can select a listing as a favorite at any results list, map detail pop-up, and detail report. Once selected, the new favorite is added to the Favorite Listings counter at the My Lists menu where all favorites are available for display.


**Note:**

The Favorite page displays in results list format, where most List page functions are available. However, the dynamic criteria panel is not available at either List or Map.

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### How . . .

#### *To Select and De-Select a Favorite*

- At a List, View, or Map detail pop-up, click the **star**  beside or above the listing. The star turns golden when selected. When a Favorite appears in a Results List, View, Map, or Map pop-up, its star is golden.
- Click a favorite's gold **star** to remove a listing from Favorites. The removal of color confirms its removal from Favorites.


#### *To View All Favorites*

1. Choose **My Lists** on the main menu.
2. Choose **Favorite Listings** on the sub-menu.
3. Work with the **Favorite Listings** list as you would any list.

#### *To Remove All Favorites*

1. Choose **Favorite Listings** on the menu. Your favorites display with all stars golden.
2. Select the **checkbox at the top of the list**. All favorites are selected.
3. Click **Remove** on the action bar. All favorites are de-selected.

***To Add all Listings in a List to Favorites***

1. At any List, select the **checkbox at the top of the list**. All listings are selected.
2. Click **Add**  on the action bar. All listings display the gold star, and are added at Favorite Listings.

## Listing Cart

Listing Cart allows you to gather listings from multiple searches in a single place; for example, before you send them to a customer. Listings remain in the cart until you remove them, so the next time you log in you can continue gathering them.

Select a listing for your cart at List and View. Once selected, the listing is added to the listing cart counter at the My Lists menu.


**Note:**

The Listing Cart page displays in results list format, where most List page functions are available. However, the dynamic criteria panel is not available at either List or Map.

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## How . . .

### *To Add and Remove a Listing for the Cart*

- At List, View, or the Map detail Pop-up, click the  **cart** icon beside or above the listing. The cart turns bold when selected. When a listing-cart item appears in a List, View, or Map pop-up, its cart icon is bold. Note: At List and View, you can also select the listing you want to add to the cart and click **Add** on the action bar.
- Click a listing's cart icon to remove a listing from the Listing Cart. The removal of bold formatting confirms the listing's removal from the cart. Alternatively, select the listing you want to remove from the cart and click **Remove** on the action bar.

### *To View Listings in the Listing Cart*

1. Click **My Lists** on the main menu.
2. Click **Listing Cart** on the sub-menu.
3. Work with the listing cart list as you would any list.

## My Listings

Use My Listings— from My Lists on the main menu— to view a results list of all your active and under contract listings. As you accumulate new listings or their status changes, they are added to or removed from the My Listings counter at the My Lists menu, where they are available for display.

When you log in, the system identifies you and your office. Only you can access your own or your office's listing information. When you are a Co-Listing Agent for a listing, that listing also displays at My Listings.

**Note:**

The My Listings page displays in results list format, and all the functionality of the List page is available.

### *To View My Listings*

1. Click **My Lists** on the main menu.
2. Click **My Listings** on the sub-menu.
3. Work with the My Listings list as you would any list.

## Office Inventory

Use Office Inventory—from the My Lists menu—to create a variety of reports summarizing office inventory. You may, for example, want to know how many listings are under contract to determine upcoming closings and anticipated commissions. Or you may want to view each agent's inventory including total volume, average price, and, when appropriate, average DOM (days on market).

To allow a variety of ways to review the Office Inventory, the system provides a choice of grouping schemes.

You can generate inventory reports for your office alone, or for one or more offices in your firm. You can include listings of one or more class and status. The listings can be public, private, or both.

### Grouping the Results

At the Group By field, select a grouping scheme for your Office Inventory. Schemes include Status, Agent, and Class. Alternatively, you may leave the report ungrouped.

Once you select a grouping scheme and submit the criteria, results are segmented and labeled according to that scheme.

***The following column set options are available at Group By:***

- **Status** Groups listings by Office; within Office by Status. Key information—appropriate for each status—displays for each listing. Listing agent is excluded.
- **Agent** Groups listings by Office; within Office by Agent (in alpha order by last name); within Agent by Status.
- **Class** Groups listings by Office; within Office by Class; within Class by Status.
- **Full Results (not grouped)** Displays listings without grouping them.

### ***Group Statistics***

When you run Office Inventory after selecting your Group By scheme (Status, Agent, or Class) the system calculates and displays statistics at the bottom of each status grouping. Statistics include the number of listings, dollar volume, and both average and mean price. Additionally, the average DOM displays when the status group is Under Contract, Closed, or Rented.



## Sorting the Results

Listings are numbered consecutively even when grouped. If the results are grouped and you click on a column heading to change the sort order, the system applies sorting to all groups simultaneously.

## Selecting a Column Set

Use any column set to display results, or add your own. Columns from the selected column set display at results, grouped by whatever scheme you select at Group By.

## Running the Office Inventory

### *To Run an Office Inventory*

1. From the **My Lists** menu, click **Office Inventory**.
2. As needed, change selections for **Class**, **Status**, and **Public/Private**.
3. At **Listings For**, choose **My Office** to generate a report for your office only; or choose **My Firm** to generate a report for one or more offices in your firm. (Note: If you choose **My Firm**, select one or more offices from the dropdown list. To choose multiple offices, CTRL+Click each as needed.)
4. At **Date Range**, enter dates to generate a report that reflects a particular time frame. The date range is used to filter results for every status except Available.
5. At **Group By**, choose a primary grouping scheme: **Status**, **Agent**, **Class**, or **Full Results (not grouped)**.
6. Click **Continue** to see grouped search results.

### *To Work with Office Inventory Results*

Set Page Size to “All” in order to scroll through the entire report. You can use a different Page Size setting, but if you do so, groupings are not as easy to review.

### *To Display a Listing in Detail View*

- At the Office Inventory results list page, double click an ML# to display the listing in detail view. Click the browser Back button to return to List.

***To Print the Office Inventory***

1. At the Office Inventory results list page, click **Print** at the action bar.
2. At the **Print Options** dialog box, leave defaults selected: **List Rows**, and **For All *n* Listings**
3. Click **Print** (or click Print Preview, followed by Print).
4. Follow browser prompts.

***To Change the Grouping Scheme at the Results List***

1. Click the arrow at the **Group By** dropdown list. Note: It appears on the toolbar with arrows for navigation as well as page size and column set selections.
2. Select Agent, Class, Status, or No Grouping.
3. Results re-display with the new grouping scheme applied.

## Recent Searches

Use Recent Searches—from My Lists on the main menu—to view a list of your recent searches, allowing you to re-run or change any you choose. Each time you run an instance of the recent search, the system tracks and updates search results and the results counter.

The list of searches displays the most recent search first, in reverse-chronological order. If the search was a pre-defined or saved search, its name appears in the list (for example, Address Search). If the search was a New search, the Class and Availability and Public/Private values appear at the name.

**Note:**

Recent Searches do not include Map and dynamic criteria panel searches. If, however, you click Revise Criteria at a Map Search, then resubmit the search at the Criteria page, the search is stored in the Recent Search list.

### ***To Run a Recent Search***

1. Click **My Lists** on the main menu.
2. Click **Recent Searches** on the sub-menu.
3. To separate listings from public records, click the **Type** column heading. To select a search, click its row.
4. To view current search results immediately, click **Results** ; or

To view a selected search at the Criteria page, click **Continue** ; or double-click the search.

### ***To Delete a Recent Search***

1. Click **My Lists** on the main menu.
2. Click **Recent Searches** on the sub-menu.
3. To select a search, click its row.
4. Click **Delete**.
5. At the confirmation prompt, click **Delete**.

## Recently Viewed

Use Recently Viewed—from My Lists on the main menu—to display a list of your recently viewed listings.

**Note:**

The Recently Viewed page displays in results list format, and all the functionality of the List page is available.

### *To See Recently Viewed Listings*

1. Click **My Lists** on the main menu.
2. Click **Recently Viewed** on the sub-menu.
3. Work with the Recently Viewed list as you would any list.

### *To Clear Recently Viewed Listings*

1. At the Recently Viewed list, select the rows you want to clear. (To select all rows, select the checkbox in the heading row.)
2. Click **Clear** on the action bar.
3. At the confirmation prompt, click **Delete**.

# Photo & Slideshows

## View Photos

Use the Photos action—from List or View- to view all the photos for a single property or the primary photos for multiple properties.

- Each detail report displays a photo at the top left corner of a one-per-page form, or the left side of a multiple-per-page form. When more than one photo is available, use the navigation arrows to scroll through all.
- If you click the Photo action when viewing a property in a one-per-page format, all the property's photos display. If you click the Photo action when viewing multiple properties, as in a thumbnail form, each property's primary photo displays.

See “Manage Photos” on page 168 to add or change photos.


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## How . . .

### *To Navigate Photos in the Detail Form*

1. At a detail form with multiple photos, click the **previous** and **next** buttons to page through each photo. If the listing has a single photo, navigation buttons do not appear.
2. Mouse over the photo to display its comment, if any.

### *To Work with the Photos Dialog Box*

1. Click any photo in the current detail form.
2. At the **Photos** dialog box:
  - scroll if necessary to view all the photos
  - click a photo to enlarge and optionally print it; click **Return to Photos** to close the enlargement
  - click  to print all the photos
  - click **Close X** to return to View.

***To View the Photos Dialog Box from a Multiple-Per-Page Form***

1. Click any photo in the detail form photo viewer to display all photos stored for the single listing. (See “To Work with the Photos Dialog Box” above for instructions);  
or

Select desired listings then click **Photos** on the action bar to view the primary photo for the selected listings. The checkbox below each listing’s primary photo is selected. If you clear a checkbox, that photo is no longer selected at List, View, and Map.

***To View the Photo Dialog Box from a Search Results List***

1. To view photos for all or selected listings, at a **List** page, click **Photos** at the action bar.
2. The **Photo** dialog box displays. If a single listing is selected, all of its photos display. If multiple or all listings are selected, the primary photo for each displays at the Photo dialog box.
3. At the **Photo** dialog box, click any photo to enlarge it. (See “To Work with the Photos Dialog Box” above for instructions.)

## Manage Photos

While editing a listing at the listing detail edit form, or after choosing Manage Photos at the Edit menu, you can upload your own photos or pull in available photos at Photo Library. With the photo work space displayed, you can preview the listing with photos, add photo descriptions, and move or delete photos. You can also edit and format a selected photo.

When displayed in the listing and photo gallery, each photo is placed in a rectangular space in 4:3 aspect ratio (1/3 wider than tall). While photos of any shape can be displayed within that space, your photos will look best if you ensure they are the same shape as the space. You may optionally use the Crop tool in the Photo Editor to fit them to the standard rectangle. See “Edit Photos” on page 170.

### **Notes:**

No photos are visible until at least one is added.

Once you add photos to the work area, a thumbnail photo displays for each, and the Edit action is available.

Photos that don't match the standard shape display with an asterisk \*, an alert prompting you to review them.

---

## How...

### **To Manage Photos**

1. At the **Edit Listing** tab, type the **ML#** and click **Open**. Review the summary details to confirm this is the correct listing to edit; OR

At **Add/Edit Complete**, choose **Manage Photos** from the list of edit types when submitting or editing a listing.

2. At the Photos work space, use the action bar to **Upload** a photo or choose from **Photo Library**; and/or **Edit, Delete, Preview**, or change the order of selected photos as needed.
3. Click **Submit**.
4. At the **Add/Edit Complete** dialog box, choose another option, or click **Exit**.



***To Upload Photos***

1. At the **Photos** work space, click **Upload** on the action bar.
2. At the **Upload Photos** dialog box, browse for a photo, type a description, then click **Upload**.

***To Preview the Listing with Photos***

1. At the **Photos** work space, click **Preview** on the action bar. The listing (or draft) displays in detail view. Photos display in the top left corner, and can be navigated using forward and back arrows.
2. Click **Close** to close the Preview window.

***To Add or Change a Description After Uploading***

1. At the **Photos** work space, click the text box under the photo thumbnail.
2. Type a description.

***To Move a Photo***

1. At the **Photos** work space, select the desired photo.
2. While pressing the mouse button, drag the photo to the desired location, midway between two others.
3. Wait for space to open, then release the mouse button to drop the photo at the new location.
4. Drag and drop additional photos as needed.

***To Delete a Photo***

1. At the **Photos** work space, select the desired photo.
2. Click **Delete** on the action bar.
3. At the confirmation prompt, confirm the deletion.

***To Edit a Photo***

1. At the **Photos** work space, select the desired photo.
2. Click **Edit** on the action bar.
3. Optionally enhance the photo. See “Edit Photos” on page 170.
4. Click **Save** when changes are complete.

## Edit Photos

Use the Edit Photo dialog box—available from the Edit action at the Photos tab during listing Add/Edit—to enhance a listing’s photos. You can make a photo darker or brighter; change its contrast; or rotate, re-size, crop, or delete it.

Use navigation arrows to move between photos, and the delete button to delete the photo.

**Note:**

While maximizing resolution, the system automatically reduces the *file size* of each of your uploaded photos to a maximum set by your MLS. However, the system does *not* crop or change your photo’s aspect ratio. Instead, the system allows you to upload a photo cropped to a non-standard shape, which you may prefer, for example, when displaying a small detail. You can, if desired, quickly crop photos of non-standard shape to better fit the space allowed: 1/3 wider than their height. (See “To Crop a Photo,” below. )

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## How...

### **To Change Brightness**

To darken the overall photo, click the Darken action at Edit Photo. To continue darkening, repeat the action as needed.

To lighten the overall photo, click the Lighten action at Edit Photo. To continue lightening, repeat the action as needed.

### **To Change Contrast**

To decrease the contrast between the photo’s light and dark colors, click the - Contrast action. To continue decreasing contrast, repeat the action as needed.

To increase the contrast between the photo’s light and dark colors, click the + Contrast action. To continue increasing contrast, repeat the action as needed.

### **To Rotate a Photo**

To rotate a photo counterclockwise 90°, click the - Rotate action. To continue rotating in the same direction, repeat the action as needed.

To rotate a photo clockwise 90°, click the + Rotate action. To continue rotating in the same direction, repeat the action as needed.

### ***To Crop a Photo***

When you upload a listing photo, the system retains its original aspect ratio. However, your photos will be shown in spaces that are rectangular — 1/3 wider than tall. While photos of any shape can be displayed within that space, you can maximize their appearance by ensuring they are the same shape as the space. You may optionally use the Crop tool to fit them to the standard rectangle, with an aspect ratio of 4:3.

If the system determines that a photo's aspect ratio differs significantly from the standard 4:3, an asterisk displays on the photo thumbnail. To crop a photo to standard dimensions, use the Crop action on the Photo Edit dialog box.

The Crop action applies to the photo currently displayed in the Edit Photo dialog box. The action toggles on and off. To enable cropping, click the Crop action. To exit cropping, click Crop again, or click Cancel.

When you enable cropping, the system grays out any portion of the photo that must be removed in order to match standard dimensions. Drag a corner handle in either direction. While you drag, the system constrains the photo to the correct aspect ratio. To complete the crop, click the Apply button. The system removes the grayed out portion and displays the cropped version of the photo.

Review the cropped photo. To permanently save the change and close the Edit Photo dialog box, click Save.

### ***To Navigate Through Photos***

To view more photos and move between them, use the Previous and Next actions that display as green arrows.

### ***To Delete a Photo***

To delete the photo currently displayed in the Photo Edit dialog box, use the Delete action.

## View Slide Shows

You can view a slide show of property photos from List or View.

To display a dynamic slide show of property photos, click Slideshow on the action bar.

- When you select one property for a slide show, all of that property's photos display in the form of a slide show. If available, a comment displays below the photo. At View, *only the currently-displayed property* appears in the slide show viewer, regardless of whether the property is selected at View.
- When you select several or all properties for a slide show, all of the properties' primary photos display in the form of a slide show.

To navigate to a particular photo in a slide show, mouse over the current photo to show the navigation arrows. Click right or left arrows to move to the desired photo; or simply click the desired photo below the slide show.

To close the slide show, click Close in the top right corner of the Slideshow dialog box.

### **Note:**

To see a slide show of this kind at View, select more than one property at a form that displays several (for example, a thumbnail form).

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## How . . .

### **To View a Slide Show from a One-Per-Page Detail Form**

1. To display a slide show of all photos stored for the current listing, click **Slideshow** at the action bar.
2. Click any photo below the slide show to switch to it, or mouse over the large photo to use the floating navigation arrows.
3. Click **Close** to return to the detail report.

### **To View a Slide Show from a Multiple-Per-Page Detail Form**

1. Select the checkbox for desired listing(s) then click **Slideshow** on the action bar.
2. Click **Close** to return to the detail form.

***To View a Slide Show from a Search Results List***

1. At a search results list, click **Slideshow** at the action bar to view a slide show for all or selected listings.
2. Click **Close** to return to **List**.



# Driving Directions

## Get Driving Directions

Use the Driving Directions dialog box—from List, View, and Map pages—to get driving directions from your default location to selected addresses. The dialog box displays addresses selected at List or Map in the order you choose them, or the address of the currently displayed listing at View. Alternatively, you can type the addresses. Re-order the addresses as needed.

Below the list of addresses, a map displays the suggested route. You may zoom or move the map as needed. Below the map, textual driving directions show distance and travel time.

To customize your route, select options for Avoid Traffic, Show listings on map, and Round-trip as needed.

**Note:**

If an address lacks a proper geocode and cannot be mapped, Driving Directions does not include that listing among the addresses.

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## How . . .

### *To Select Listings to Route*

*On the Results List page:*

- To choose addresses at List, select each property in the desired order, then click **Directions**, on the action bar, to initiate routing.

*On the View page:*

- To choose addresses at View when using a *one-per-page form*, you can get driving directions from your default location to the listing currently displayed. Click **Directions**, on the action bar, to initiate routing.
- To choose addresses at View when using a *multiple-per-page form*, you can get driving directions from your default location to selected listings. Select each property in the desired order, then click **Directions**, on the action bar, to initiate routing.



On the *Map* page, there are two ways to select addresses for driving directions:

- To choose addresses at listing pop-ups, open the first pop-up for your route and select its checkbox. Repeat this step—in the desired order—for each address you want to include in the route. Each property you choose is selected in the results list below the map. Click **Directions** on the action bar to initiate routing.
- To choose addresses from the results list below the map, select each property in the desired order, then click **Directions** on the action bar to initiate routing.

#### ***To Add and Reposition Addresses in the Route***

1. At the **Driving Directions** dialog box, click **Add**. The new address is added to the bottom of the list.
2. Select an **address** checkbox and click **Move Up** or **Move Down** as needed.

#### ***To Edit and Remove Addresses in the Route***

- To edit an address, select the **address** and click **Edit**. At the **Edit Address** dialog box, change the address as needed, then click **Save**.
- To remove an address, select the **address** checkbox and click **Remove**. The address is removed from the route.

#### ***To Customize the Route***

- At **Directions Options**, select options for **Avoid Traffic**, **Show listings on map**, and **Round-trip** as needed. With **Show Listings** selected, markers display for surrounding properties that match your search.

#### ***To Print Driving Directions***

1. Display driving directions at List, View, or Map.
2. At the **Driving Directions dialog**, click the **Print** icon.
3. At the **Print Options** dialog box, select or clear one or more options:

**Map:** Print the mapped route with optional round trip, reference # markers, intermediate destinations, and the distance at each destination.

**Directions:** Print turn-by-turn directions in text with distance notations and reference numbers.

**Detail Views:** Print the details in the format you select from the Detail Form dropdown list.

4. To print the pages, click the **Print** button.
5. Browsers vary. Directions may print immediately, or a dialog box may display. You may need to choose the Print option from the browser's File menu.

***To Send Driving Directions***

1. Display driving directions at List, View, or Map.
2. At the **Driving Directions dialog**, click the **Send** icon.
3. At the **Send** dialog box, complete the form as you want. "Send Listings" on page 224
4. To send the directions, click the **Send** button. At the confirmation prompt, click **OK**.

# Contacts

## About Contacts

Use Contacts—from the main menu—to add, manage, print, and look up information about your personal contacts as well as Office and Member Rosters.

Along with a search text box for quick lookup, the action bar at List and View allows you to upload, add, edit, and delete contacts; manage groups; narrow the list to selected contacts; and switch to Details.

### *My Contacts*

Your contacts are grouped for convenient access in standard and custom groups. You can add to the selection of custom groups, as needed. After opening Contacts at the main menu, click “My Contacts” to locate all groups and rosters. This dropdown list is provided in the top left corner of the List and View pages. It lists all standard groups, custom groups you have added, and options to Search Offices and Members.

### *Contact List Page*

At List you can view a list of all contacts or those in a particular group or roster, select one or more contacts from the list to display and print them at View, search contacts using criteria, preview search criteria, save the search, and run a previously-saved search. Search results update dynamically at List as you add search criteria. See “Work With the Contacts List” on page 189 .

### *Contact Detail View Page*

At View, you can display the details for selected contacts and move through all with navigation arrows. You can access a particular contact from an alphabetical names directory. When View opens, the first-selected contact displays. (See “Work With the Contacts Detail View” on page 187.) At View, use the arrows to navigate through the contacts in turn.

You can scroll through a contact’s entire form or click tabs to jump directly to View, Financials (if available), Activities, Notes, as well as Prospects if any are stored for the contact. See “Work with Contact View”. At the Prospect section, which displays if a prospect search exists for the contact, you can access or manage existing prospect searches and create new ones.

## Add and Edit Groups and Contacts

Associating your contacts with a particular group helps you organize them for quick retrieval. To further organize your contacts, add custom groups.

When adding or editing a contact, Stratus MLS displays the contact detail edit form. The detail edit form has sections that correspond to the tabs across the top of the form. To navigate the form, scroll or click a tab. You can edit your own contacts, but not those in the Brokerage or Member Rosters.

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### How . . .

#### *To Add a Custom Group*

1. Click the **Manage Groups** action.
2. At the Manage Groups dialog box, click **Create New**.
3. At the Add Group dialog box, type a name then click **Add**.
4. At the Manage Groups dialog box, click **Close**.

#### *To Rename or Delete a Custom Group*

1. Click the **Manage Groups** action.
2. At the Manage Groups dialog box, select a group.
3. To rename a group, click **Rename**. At the Rename Group dialog box, type a new name, then click **Rename**.
4. To delete a group, click **Delete**. At the confirmation prompt, click **Delete**. Note: Contacts in the deleted group remain in the general “My Contacts” group and can be reassigned to another group.
5. At the Manage Groups dialog box, click **Close**.

#### *To Add a Contact*

1. Click the **Add Contact** action.
2. At **Contact View**, enter the contact’s information. Required fields are starred with an asterisk (\*). Assigning a Status (Active/Inactive) is recommended, since it allows you to exclude inactive contacts from contact searches.

3. At **Financials**, optionally enter income, debt, and other financial information.
4. At **Notes**, enter comments about communications, interactions, and contact requirements.
5. Optionally click the **Preview** action to see the new contact in detail view. To close the Preview and return to a particular field, click that field at Preview; otherwise, click **Close**.
6. To find a particular field, click **Find** on the action bar. At **Field Name Contains**, enter a portion of the field name, then click **Find**. Enter information at the field as needed.
7. Click **Save**. The new contact appears in the Contact List.

### ***To Upload Contacts***

You can upload contacts from Windows Live Mail, Windows Mail, Outlook Express, and Outlook. Note: No Financial data can be uploaded.

1. Click **Upload** on the action bar.
2. At the Upload Contacts dialog box, click **Browse**.
3. At Choose file to upload dialog box, browse for the contacts file, select it, then click **Open**.
4. At Add Contacts to Custom Group, type the name of a new custom group in order to create it, or select an existing group.
5. Click **Upload**.
6. At the Upload Log dialog box, review the list of successfully uploaded contacts, then click **Close**.

### ***To Edit a Contact***

1. Select a contact at List, or display the desired contact at View.
2. Click the **Edit** action.
3. Navigate through the edit form, OR:

Click the **Find** action to open the Find a Field dialog box. At **Field Name Contains**, enter a portion of the field name, then click **Find**.

4. Edit fields as needed.
5. Click **Save**.

***To Delete a Contact***

1. Select a contact at List, or display the desired contact at View.
2. Click the **Delete** action.
3. At the confirmation prompt, click **Delete**.

## Search Contacts

At the contacts List page, the left side panel offers dynamic criteria entry. As you enter each desired field value, the results list updates accordingly. At List, the criteria panel provides Preview, Save Search, Clear, and Rename actions. Be sure to clear the panel before entering criteria for a new search.

**Note:**

To look up a particular contact in a group already displayed, use the search text box on the action bar. Type part or all of a contact's name to narrow search results accordingly.

The MLS determines the maximum number of search results to display for Office and Member Searches.

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### How . . .

#### *To Clear the Criteria Panel*

To clear all entered and selected values, click **Clear** at the panel's small action bar.

#### *To Search Contacts by Criteria*

There is no need to submit criteria, because the system finds matches dynamically as you enter criteria.

1. In the left-side criteria panel, find a field you want to search by.
2. Type the start of a field value or the whole value (for example, Last Name starts w/ Smi or Smith).
3. Optionally, select another comparator (such as equals, contains) from the dropdown list.
4. Optionally, select the "not" checkbox to exclude contacts that match the value you enter in the text box.
5. Optionally, click the "or" button to enter more than one value for the field.
6. Review the search results in the main panel.



### ***To Preview Search Criteria***

To preview all entered criteria so the system can check for validity and display a count, click **Preview** at the panel's small action bar.

### ***To Save a Search***

A search is saved with all the criteria from the dynamic criteria panel (the template and Add a Field) and the current value from the group dropdown list.

1. Enter search criteria and preview to validate.
2. If you are happy with the list of search results, click **Save Search** at the panel's small action bar.
3. At the Save Search dialog box, enter a **Name** for the search.
4. Click **Save**.

### ***To Use a Saved Search***

1. At the top of the criteria panel, click **Use Search**.
2. Select a saved search from the dropdown list.
3. The criteria panel fills with the selected search's criteria and applies the group that was saved with the search. Results display immediately at the results list.

### ***To Rename a Saved Search***

1. At Use Search, select a saved search.
2. Click **Rename** at the panel's small action bar.
3. At the Rename Saved Search dialog box, type a different **Name**.
4. Click **Rename**.

### ***To Delete a Saved Search***

1. At Use Search, select a saved search.
2. Click the red "**X**" at the top of the panel.
3. At the confirmation prompt, click **Delete**.

### ***To Use the Search Text Box***

This feature acts as a "Contains" search and checks for matches—within the current group—in the following fields: First Name, Middle Name, Last Name, Organization, and email address.

1. With a group displayed, click inside the Search text box on the action bar.
2. Type part of the First Name, Middle Name, Last Name, Organization, or email address.
3. As you type, the contact list refreshes to display a narrowing list of contacts.
4. Select a contact or continue typing until one contact remains.
5. Clear the search text box to avoid improper display of subsequently selected groups.

## Work With the Contacts Detail View

The Contacts View page provides an alphabetical directory in the left panel, where you can look up a last name, see a group, and narrow a list of contacts by alphabet.

For instructions to open groups, view rosters, use the search text box, manage groups, and add, edit, and delete contacts, see “Work With the Contacts List” on page 189.

### The Names Directory

A directory of contact names displays in the left panel at View. Names are listed in alphabetical order.

**To narrow the list**, select a group, then:

- To limit the list to names beginning with a particular letter, click the letter
- To limit the list to a particular name, enter text at the search text box

**To display a contact's detail form**, click any name.

**To navigate through more contacts** in the narrowed list, click an arrow.

### The Alphabet Pick List

The list includes letters A through Z in addition to the default “A-Z” choice at the top, which causes all contacts in the current group to display.

- **To use the pick list** to narrow the names to a particular letter, click the letter.

### The Detail View Form

In the main panel, View displays the contact detail forms for all contacts currently displayed in the directory. To make changes in any section of the Contact detail form, click **Edit** .

- **To navigate through a group of detail forms**, click an arrow.
- **To view a contact's entire form**, use the scroll bar
- **To jump directly to a section of the form**, click tabs for Details, Financials (if available), Activities, Notes, and Prospects (if any).

## The Activities Tab

Activities you enter for the contact display at Calendar.

**To add an activity for the contact**, click the Activities tab, then enter details at the available fields.

## The Prospects Tab

If a contact has one or more prospect searches, the prospects remain at the Prospects tab until you delete them. This allows you to salvage an expired prospect beyond the normal limit.

- **To salvage a prospect** beyond expiration, select it and click Extend.
- **To find matches for a prospect**, select it and click Matches.
- **To create a new prospect**, click Create.
- **To manage a prospect**, select it and click Manage.
- **To change a prospect's criteria**, select it and click Search.

## Work With the Contacts List

The Contacts List page allows searches and a list of contacts displayed by Group or search results. To narrow the contact list, use the search text box on the action bar, or enter criteria at the search panel. (See “Search Contacts” on page 184 .)

The groups dropdown list appears at the top left corner of the page, just below the action bar. The groups list includes all system groups as well as custom groups you have added. Groups also include Member and Office Rosters, and temporary groups generated by the system for search results.

**Note:**

The MLS determines the maximum number of search results to display in member and office searches.

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### How . . .

#### *To Open a Group and View Contacts*

1. At the **Group list** at the top left corner of the page, select one or more groups.
2. At the resulting list of contacts, scroll and select contacts as desired, then click **View** on the action bar.
3. The first contact displays in the detail view form. Use arrows to navigate.

#### *To Use the Member Roster*

1. At the Contacts submenu, or at the **Group list** at the top left corner of the page, select **Member Roster**.
2. At the list of search results, select one or more members then click **View** on the action bar; OR

Click **Show Office** to see the selected member’s office.

3. The first member displays in the detail view form. Use arrows to navigate.

### ***To Use the Office Roster***

1. At the Contacts submenu, or at the **Group list** at the top left corner of the page, select **Office Roster**.
2. Select an office then click **View** on the action bar; OR

Click **Show Members** to see members of the selected office.

3. The first office displays in the detail view form.
4. Use arrows to navigate.

### ***To Narrow and Expand the List***

1. Select one or more contacts you want to keep in the list.
2. Click **Narrow** at the action bar.
3. Repeat steps 1-2 to narrow further.
4. To expand the pre-narrowed list, click **Expand** on the action bar.
5. If the list was narrowed more than once, repeat step 4 until the full list displays.

### ***To Narrow the List with the Search Text Box***

This feature acts as a “Contains” search and checks for matches—within the current group—in the following fields: First Name, Middle Name, Last Name, Organization, and email address.

1. With a group displayed, click inside the Search text box on the action bar.
2. Type part of the First Name, Middle Name, Last Name, Organization, or email address.
3. As you type, the contact list refreshes to display a narrowing list of contacts.
4. Select a contact or continue typing until one contact remains.
5. Clear the search text box to avoid improper display of subsequently selected groups.

### ***To Sort the List***

- To sort the list in ascending order, click a column heading. Click again to sort in descending order
- To sort by name, click the **First**, **Middle**, or **Last** column heading accordingly.

# Print and Download Personal Contacts and Rosters

Print Contact records in List Row, Detail View, or Avery Label format. When printing Contacts in Detail View, Avery choices for printing labels are included in the list of Forms. You can select Avery 5160 (3 across) or Avery 5161 (2 across) for Contact Addresses.

Download personal Contact records for Outlook and Windows Live Mail, Avery Label format, or *all* available data. When downloading Contacts in List Row format, column set options allow selection of all available data, or data supported by Outlook and Windows Live Mail.

**Note:**

Members and Offices cannot be downloaded.

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## How . . .

### *To Print Contact Records*

1. Select one or more contacts at the contacts List or View page.
2. Click **Print**.
3. At the Print dialog box, to print rows, select **List Rows**; or to print each record's details, select **Detail Views**.
4. At **For**, to print the displayed record (if any), select **The Current Contact**; to print all records in List, select **All X Contacts**; or to print currently selected records, select **Selected Contacts**.
5. At **Column Set**, applicable only to List Rows, select the desired column set format.
6. At **Form**, applicable only to Detail Views, select the desired form.
7. Click **Print**. Contact records may print immediately, or a browser dialog box may display. Note: To preview before printing, click **Preview**. Click Print when you're ready to print.

### ***To Print Contact Labels***

1. Select one or more contacts at the contacts List or View page.
2. Click **Print**.
3. At the Print dialog box, select **Detail Views**.
4. At **For**, to print labels for the displayed record (if any), select **The Current Contact**; to print labels for all records in List, select **All X Contacts**; or to print labels for currently selected records, select **X Selected Contacts**.
5. At **Form**, select the Avery label you want.
6. At **Replace Contact's Name With**, enter a different name to display on the labels, if needed. Note: The replacement name (for example, My Neighbor or Recipient) appears on *all* the labels.
7. Click **Print Preview**; confirm that the labels appear as you want them.
8. Click **Print**. Labels may print immediately, or a browser dialog box may display.

### ***To Print Member or Office Records***

1. Select one or more member or office records at the contacts List or View page.
2. Click **Print**.
3. At the Print dialog box, select **List Rows** to print rows, or **Detail Views** to print each record.
4. At **For**, to print the displayed record, select **The Current Contact**; to print all listed records, select **All X Contacts**; or to print the currently selected records, select **X Selected Contacts**.
5. At **Column Set**, applicable only to List Rows, select the desired column set format.
6. Click **Print**. Roster records may print immediately, or a browser dialog box may display.

### ***To Download Personal Contact Records***

1. Select one or more personal contacts at the contacts List or View page.
2. Click **Download**.
3. At the Download dialog box—to download for Outlook, Windows Live Mail, or all data—select **List Rows**; or to download contact records, select **Detail Views**.
4. At **For**, to download the displayed contact (if any), select **The Current Contact**; to download all contacts, select **All X Contacts**; or to download currently selected contacts, select **X Selected Contacts**.
5. At **Column Set**, applicable only to List Rows, select the desired column set format: “Outlook or Windows Live Mail” or “All Downloadable Fields”.



6. At **Include column names as first row**, applicable only to List Rows, select the checkbox if you want to include headings. Note: You cannot clear this checkbox when downloading contacts for Outlook or Windows Live Mail, which require headings.
7. At **Form**, applicable only to Detail Views, select the desired form.
8. Click **Download**.

#### ***To Download Personal Contact Labels***

1. Select one or more contacts at the contacts List or View page.
2. Click **Download**.
3. At the Download dialog box, select **Detail Views**.
4. At **For**, to download a label for the displayed record (if any), select **The Current Contact**; to download labels for all contacts in List, select **All X Contacts**; or to download labels for currently selected contacts, select **X Selected Contacts**.
5. At **Form**, select the desired Avery form.
6. Click **Download**.



# Prospect Match

## About Prospect Match

With Prospect Match, you store a prospective buyer's home requirements, allowing Stratus MLS to automatically track available listings that match the prospect's search criteria. The system runs the search at the frequency you choose, and automatically emails a summary of the matches to all recipients.

For each prospect, create a profile and enter search criteria. Once the search is saved, the system emails an alert each time new listings, back-on-markets, or price changes generate matches.

If you know a prospect won't be able to check email for a period of time, you can suspend prospect searches and email alerts, resuming them when needed.

**Note:**

Prospect Match is agent-specific. You are the only one with access to your prospects.

## New Prospects

You can create a new prospect wherever it is convenient to do so:

- At the Search Type page, select "Prospect Search".
- At any search for available listings, click "Create Prospect" before submitting the search.
- At Contact View, select the Prospects tab.

## New Matches

When the system finds new matches:

- All designated recipients receive emailed links to new matches.
- At Info Center, a linked "New Prospect Matches" alert displays.
- The latest set of matches are also available at the Prospect Match page via the "Matches" button.

## Prospects Linked to Contacts

By linking a contact to your prospect search you allow the system to automatically fill information in the prospect profile, and you can access and add, manage, and extend prospect searches directly from the contact's detail view page. When you create a prospect search for a new customer, it is simple to create the contact on the fly.

## Extending Prospects

When a prospect is due to expire, or has already recently expired, the prospect is eligible for extension and an alert to this effect displays at Info Center. Note: The MLS decides the number of days within which the prospect can be extended.

If not extended, the prospect is no longer visible at the list of prospect searches at the Search Type page. However, the expired prospect can be restored at the Contact page, if one exists.

## Work with Prospect Match

Prospects include three sections:

- Name and date
- Information about the prospect
- Search

You can enter the first two sections directly or let the system automatically fill information from an existing contact.

You can define search criteria for the prospect search directly, or let the system pass criteria from an open search you want linked to a prospect.

When a prospect is linked to a contact, you can add, manage, extend, and review prospect searches from Contact.

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### How . . .

#### *To Create a Prospect at the Search Type Page*

1. At the main menu click **Search**.
2. At the Search Type page click **Prospect Matches**.
3. At the Prospect Searches page click **Create**.
4. At the Create Prospect dialog box, enter information for the prospect profile (see field descriptions below) then click **Continue**.
5. Enter criteria at the Criteria page. Click **Save Prospect** on the blue bar at the window bottom.
6. Click **OK**.
7. To run the search and see matches, click **Submit** at the Criteria page; or click **Manage Prospect** to make changes (see below).

#### *To Enter a Prospect's Profile Information*

At the Create Prospect dialog box, enter or edit the following:

**Prospect Name:** Enter a name to identify the prospect. The name need not be unique. (To change a saved prospect's name, enter a new one and save the prospect.)

**Expiration Date:** For new prospects the system automatically fills a date ninety days from the current date. You can change a date provided it meets MLS requirements. To extend a saved prospect's expiration date, if the prospect is eligible for extension (see "About Prospect Match" on page 196), enter a new one and click Extend.)

**Suspend this Prospect:** Select this check box to suspend searching for the prospect, for example while the prospect is on vacation. Clear the check box to resume searching. Note: If the Expiration Date passes while the prospect is suspended the prospect expires.

## Email Options

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**Contact:** Optionally select an existing contact. The full name and primary email address, if any, are available at the corresponding fields. Alternatively you can type in the full name and email addresses. You can change the selected contact.

**Full Name:** If using a saved contact, the full name automatically fills. You can edit the name. If you do not use an existing contact, type the name.

**Email:** If using a saved contact, the primary email address, if there is one, automatically fills. If you do not use an existing contact, type a name. To prevent the contact receiving a prospect match email, clear the check box.

**Include Bcc:** Enter email addresses or Contacts to whom you want to send a blind copy. Note: Bcc addresses are visible only in the body of the Agent's copy. To avoid triggering a spam filter, the number of Bcc addresses is restricted.

**Form:** Select the detail form the recipient will access from emailed prospect match alerts.

**Send a Copy to Yourself:** Select the checkbox to receive a copy of the prospect matches at your email address; clear it to discontinue receipt. If you have multiple prospects, matches for each are combined into one email message.

**Include Photo Gallery:** If enabled, select the checkbox to include a photo gallery for each linked listing. Note: When the specified form excludes listing addresses, the photo gallery is not provided.

**Include Map:** If enabled, select the checkbox to include a map displaying the locations for all linked listings. Note: When the form excludes listing addresses, the map is not provided.

**Additional Recipients:** Type the email addresses for additional recipients. Separate addresses with a comma, space, or line break. You can enter additional contact addresses, an address for another agent, or an alternate address for yourself. To prevent additional recipients receiving a prospect match email, clear the checkbox.

**Frequency of Email:** The list includes Hourly, Every 6 Hours, and Once Daily. Hourly will be sent on the hour, every six hours will commence from midnight, and once daily will run in the midnight process.

## Search

---

For a new prospect this section allows selection of one or more classes, listing types, and a search type.

### *To Define a Prospect's Search Criteria*

1. After creating the prospect profile (see above) click **Continue**.
2. At the Criteria page, enter the prospect's criteria as you would for any search.
3. Click **Save Prospect**.
4. When prompted, click **OK**. The Criteria page redisplay.
5. To submit the search for current matches, click **Submit**.
6. To make changes in the profile or search at any time, click **Manage Prospect**.

### *To Create a Prospect While Searching*

*If the criteria in a search for available listings meets a customer's needs, you can create a new prospect profile for that customer and set up prospect match alerts for yourself and the customer.*

1. After entering criteria at the Criteria page for a new, saved, or pre-defined search, before you submit the search click **Create Prospect** on the action bar.
2. At the Create Prospect dialog box, enter information for the prospect profile and email settings (see above: [To Enter a New Prospect's Profile Information](#)).
3. At the blue notification bar, click **Save Prospect**.
4. Click **OK** at the confirmation prompt.
5. To run the search and see matches, click **Submit** at the Criteria page; or to make immediate changes to the prospect click **Manage Prospect**. (See [To Manage Saved Prospects](#), below).

### *To Create a Prospect in Map Search*

1. After locating the desired search area and optional criteria at a map search, click **Prospect** on the criteria panel's action bar.
2. At the Create Prospect dialog box, enter information profile and email information (see above: [To Enter a New Prospect's Profile Information](#)).



3. Review the criteria summary.
4. Click **Save Prospect**; or to make immediate changes click **Manage Prospect**. (See [To Manage Saved Prospects](#), below).

#### ***To Manage Saved Prospects***

1. At the Prospect Searches page select a prospect, then click **Manage**; or At the Criteria page after saving the prospect, click **Manage**.
2. Change profile info as needed and review the displayed search summary.
3. *To continue without changing criteria*, click **Save Prospect**; OR *To save then edit criteria*, click **Save Prospect and Edit Criteria**, then edit criteria.
4. Click **Save Prospect**, then click **OK**.

#### ***To Create or Manage a Prospect Search for a Contact***

*At a contact's detail form you can manage existing prospect settings or create another prospect search for the contact. Creating a prospect is possible only if one already exists for the contact.*

1. At a contact's detail view, the Prospects tab displays if a prospect search exists for the contact.
2. Click the **Prospects** tab.
  - ***To create a prospect*** click **Create** then enter information for the prospect profile and email settings (see above: [To Enter a New Prospect's Profile Information](#)). Click **Continue**. Define search criteria then click **Save Prospect**.
  - ***To manage a saved prospect*** click **Manage** then review and change information for the profile and email settings as needed.
    - o *To continue without changing criteria*, click **Save Prospect**; OR
    - o *To save then edit criteria*, click **Save Prospect and Edit Criteria**, make criteria changes then click **Save Prospect**.

#### ***To See a Saved Prospect's Matches***

1. At the Prospect Searches page (displayed when you select Prospect Searches at the Search Type page) click to select a prospect.
2. To display the results list, click **Matches**.

3. At the **Days Back** dropdown list, select the number of days for which you want to see the prospect's matches.
4. The results list displays.

### ***To Extend Prospects***

*You can extend prospects that are due to expire or that expired within the last two weeks.  
Note: Prospect searches are extendable beyond two weeks of expiration when viewed at Contacts.*

1. Click a prospect expiry alert at Info Center, or choose Prospect Searches at the Search Type page. The Prospect Searches list displays.
2. Select one or more prospects that are within two weeks of expiration.
3. Click **Extend**.
4. At the confirmation prompt, click **Yes**.

### ***To Suspend Prospects***

1. At the Prospect Searches page click to select one or more prospects.
2. Click **Manage**.
3. Select the **Suspend this prospect** checkbox.
4. Click **Save Prospect**.
5. At the Prospect Searches list, confirm that the suspension took place.

### ***To Delete Prospects***

1. At the Prospect Searches page click to select one or more prospects.
2. Click **Delete**.
3. At the confirmation prompt, click **Delete**.

### ***To Review Prospects***

1. At the Prospect Searches page click to select one or more prospects.
2. Click **Review**. The Review Prospects dialog box displays.
3. To print prospect settings, click **Print**.
4. To close the Review Prospects dialog box, click **Close**.

**CMA**

## About CMAs

Use CMA from the main menu to add and maintain a customizable Comparative Market Analysis.

The CMA provides prospective sellers an analysis of market activity for comparable properties in any class. The report provides the information sellers need in order to understand and feel comfortable with a pricing strategy and with you as their agent.

### *What's In the CMA*

The CMA allows data entry at each of the following sections, and each can be opened at the CMA detail edit form by selecting a tab or by scrolling. See “Data Entry at CMA Sections” on page 206 :

- Contact
- Subject Property Details
- Agent
- Cover Page
- Cover Letter
- Comparables
- Edits & Adjustments
- Marketing
- Attachments
- Contents

The CMA presentation may include any or all of the following pages:

- Cover Page
- Cover Letter
- Table of Contents
- Subject Property Details
- Subject Property Photo Gallery
- Side-by-Side Property Comparison
- Comparable Summary
- Edits & Adjustments
- Consumer Medium Detail Form
- Another selected Detail Form
- Consumer Thumbnail Form
- Photo Gallery
- Flyer

Road or Aerial Map  
Market Statistics Report  
Days on Market Report  
Marketing Plan

### ***How it Works***

Stratus MLS streamlines CMA generation and provides a comprehensive and customizable report for client presentations.

While adding or updating a CMA, add information in the appropriate sections of the CMA detail edit form, rewrite and format components to customize them, and upload as needed. Scroll through the detail edit form, or select a particular section from the tabs across the top of the CMA page.

- Choose comparables from listing and public record search results or a map, and by ML# or by listing cart. The listing search can include private as well as MLS listings.
- Create the CMA with or without a subject property, in order to meet a variety of presentation needs. You can include a marketing plan and financial analyses in your presentation, and make numeric adjustments as needed.
- Save, print, and email the CMA. You can also copy it, specify components you want to include in the report, and customize your cover page and other sections.

## Data Entry at CMA Sections

When you start a new CMA or open an existing one, the system presents fields in a single, scrollable CMA detail edit form. Fields are organized in sections that correspond to tabs at the top of the form.

To jump directly to a new section, click its tab. To move sequentially from field to field, press the Tab key. Fields starred with an asterisk (\*) are required.

To include particular components in the presentation, select them at the Contents tab.

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### How to Complete Data Entry at CMA Sections . . .

#### Contact

You can create a CMA with or without associating the presentation with a particular contact. If you don't want to associate the presentation with a contact, you can choose instead to enter client information directly on the Cover Page and Cover Letter, or exclude client information altogether.

If the contact is new, you can enter and save the contact details directly in the CMA, and the system will add the new person to your Contacts.

Select or clear the "Include a Contact in this CMA" checkbox accordingly.

#### *Choose an Existing Contact*

When you choose an existing contact, the system automatically fills information about that contact in the CMA detail edit form.

##### *To Pick from All Contacts or By Group*

1. Select **Include a Contact in this CMA**.
2. Click the **Contacts** button. All your contacts display.
3. To narrow contacts to a particular group, click the down arrow at the **My Contacts** dropdown list then select a group.
4. Select one of the current group's contacts or, to further narrow the list before selection, start typing the name in the Search text box.

5. The system automatically completes the CMA's Contact section. Edit or add information as needed.
6. Click **Save** or navigate to the next CMA section.

#### *To Pick from a Narrowed List*

1. Select **Include a Contact in this CMA**.
2. At the **Use Existing Contact** text box, start typing the name. The contacts browser opens and automatically narrows the list as you type.
3. Finish typing the name or select from the narrowed list in the contacts browser.
4. The system automatically completes the CMA's Contact section. Edit or add information as needed.
5. Click **Save** or navigate to the next CMA section.

#### *Add New or Edit Existing Contact Information*

If the contact is new, you can enter the information directly at CMA. Likewise, you can edit information for existing contacts directly at the CMA edit detail form.

1. At **Contact Details**, enter information for the contact. Fields starred with a blue asterisk (\*) are required. Assigning a Status (Active/Inactive) is recommended, since it will allow exclusion of inactive contacts from searches.
2. Click **Save**. The system updates new or edited contact information at Contacts.
3. Navigate to the next CMA section as needed.

## **Subject Property**

The subject property is included so that readers can see how it compares to other properties included in the presentation. You can create a CMA with or without a subject property. If you want to include a subject property that is not yet in the MLS database, you can enter details directly at the CMA detail edit form.

If a subject property is currently in the Multiple Listing System or Public Records database, even if expired or archived, you can search for the property or enter an existing ML# or Parcel ID.

Whether you search and select from results, or enter an ML# directly, the system automatically transfers the appropriate information to the Subject Property detail edit form.

To include or exclude a subject property for comparison with comparable listings or public records, select or clear the “Include a Subject Property in this CMA” checkbox as appropriate.

### ***Choose an Existing Subject Property***

When you choose an existing property for a CMA’s subject property, the system automatically completes information in the CMA detail edit form.

#### ***To Search for an Existing Property***

1. Select the **Include a Subject Property in this CMA** checkbox.
2. Click **Search Listings** or **Search Public Records**.
3. At the Search Listings or Search Public Records dialog box, select basic criteria then click **Continue**.
4. At the Criteria page, enter additional criteria as needed. Optionally, to limit matches to a particular location by drawing a radius or polygon, click **Map** on the action bar. (See “Work With Criteria” on page 75.) Click **Submit**.
5. At the search results List, select a row, then click **Use As Subject Property**.
6. The system automatically completes the CMA’s Subject Property section.
7. Edit or add information as needed, and upload photos (see below). You can save the subject property as a private listing draft.
8. Click **Save** or navigate to the next CMA section.

#### ***To Select a Subject Property by ML# or Parcel ID***

1. Select the **Include a Subject Property in this CMA** checkbox.
2. Enter an ML# or Parcel ID then click **Use**.
3. At the search results List, select a property, then click **Use As Subject Property**.
4. The system automatically completes the CMA’s Subject Property section.
5. Edit or add information as needed, and upload photos (see below). You can save the subject property as a private listing draft.
6. Click **Save** or navigate to the next CMA section.

### ***Delete a Subject Property***

1. At the Subject Property section of the CMA, click **Delete** on the action bar.



### ***Upload Subject Property Photos***

1. At **Subject Property Photos**, click **Upload**.
2. At the Upload Photos dialog box, click **Browse**.
3. Browse and select photos, then confirm the selection at your browser's dialog box. (See "Manage Photos" on page 168.)
4. At the Upload Photos dialog box, click **Upload**.
5. Optionally click a photo to enhance it. (See "Edit Photos" on page 170.)
6. Click **Save** or navigate to the next CMA section.

### ***To Delete Subject Property Photos***

1. At **Subject Property Photos**, select a photo.
2. Click **Delete** on the action bar.
3. At the confirmation prompt, click **Delete**.

## **Agent**

The Agent section of the CMA detail edit form contains information about the primary agent and co-agent (if another agent in your company is acting as co-agent).

### ***Complete Agent Information***

1. Based on your Log In, the system automatically completes the primary Agent Name, telephone, and other information.
2. If there is a co-agent, select an office from the **Office** dropdown list and select a person from the **Co-Agent** dropdown list.
3. Click **Use** to allow the system to complete available co-agent information.
4. Add or edit information as needed.
5. Click **Save** or navigate to the next CMA section.

## **Cover Page**

The system displays a CMA cover page template automatically filled with information drawn from the Contacts, Subject Property, and the Agent sections, as well as the Office Roster.

You can safely change information on the cover page without affecting stored data. Use the system default, or customize and store a different version as your own default.

As desired, add your logo, subject property photo, and photos of yourself and co-agent.

A formatting toolbar along the top of the section allows you to customize the cover page. Note: If you prefer working directly with source code, use the HTML tool at the far right side of the toolbar to open your browser's HTML source editor.









### Customize the Cover Page

1. The first time you create a CMA, the system displays a default cover page.
2. Using the formatting toolbar at the top of the section (see following table), optionally make changes in text, logo, photos and so forth.
3. To see the customized page, click **Preview** on the action bar.
4. To set the customized version as your default, click **Set As Default**. Click **OK** at the confirmation prompt.

### CMA Format Editor Toolbar



Format	Tool	Effect
cut		cut selected item to remove it to the clipboard
copy		copy selected item to duplicate and paste as needed
paste		paste cut or copied item
Bold (Ctrl+B)		<b>these words are bold</b> and these are not.
Italic (Ctrl+I)		<i>these words are italic</i> and these are not.
Underline (Ctrl+U)		<u>these words are underlined</u> and these are not.
Strikethrough		In a sentence <del>these words are struck through</del> and these are not.
Align Left		This sentence is aligned left.
Align Centre		This sentence is aligned center.
Align Right		This sentence is aligned right.
Align Full		This paragraph is aligned full (justified) in order to spread the words on each line from margin to margin. To achieve this affect, the system distributes space between

words as needed. The last line of a fully aligned paragraph is aligned left.		
Unordered list (Bulleted)		<ul style="list-style-type: none"> <li>• First bulleted item</li> <li>• Second bulleted item</li> </ul>
Ordered list (Numbered)		<ol style="list-style-type: none"> <li>1. First numbered item</li> <li>2. Second numbered item</li> </ol>
Increase Indent		Indent the selected item
Decrease Indent		Decrease the selected item's indent
Horizontal Rule		Insert a horizontal line at the cursor location
Select text color		these words are blue and these are red
Font Family	<input type="text" value="Arial"/>	Click down arrow for a list of fonts to select from.
Font Size	<input type="text" value="3 (12 pt)"/>	Click down arrow for a list of font sizes. These words are 12pt
Undo (Ctrl+Z)		Click to undo the last change.
Redo (Ctrl+Y)		Click to restore the last undone change.
HTML	HTML	Click to edit source code.

## Cover Letter

The system displays a CMA cover letter automatically filled with information drawn from the Contacts, Subject Property, and Agent sections, as well as the Office Roster.

If needed, you can safely change information on the cover letter without affecting source data. You can use the default system cover letter, or customize and store a different version as your own default letter.

A formatting toolbar allows you to customize the letter. Note: If you prefer to work directly with source code, use the HTML tool at the far side of the toolbar to open your browser's HTML source editor.

To use the default letter for existing CMAs, open the CMA then click **Use Default**.

### Customize the Cover Letter

1. The first time you create a CMA, the system displays a default cover letter.

2. Using the formatting toolbar at the top of the page (see previous table), optionally make changes in text, logo, photos and so forth.
3. To review the letter, click **Preview** on the action bar.
4. To set the edited version as your default, click **Set As Default**. Click **OK** at the confirmation prompt.

## Understanding Comparables

At the Comparables section, build a list of properties useful for comparison purposes. These may include available or sold, rented, expired, public records and archived. You may find it convenient to use a Map Search for comps of all statuses, because map markers are distinguished by color. Search and add comps to the list, then review and narrow the list to suit the needs of the presentation.

Comparables (comps) may include:

- Listings you select at a listings search
- Public records you select from a public records search
- Listings you add directly by ML#
- Your listing cart contents

Specify a price range for which you want to find comps. For available comps, the List Price applies. For expired comps, the List Price applies. For sold comps, the Sold Price applies. For rentedcomps, Rentprice applies.

Specify a date range for which you want to find unavailable comps. The date range applies to Sold Date for Sold, Expired Date for Expires, and Rented Date for Rented.

### **Note:**

Public records provide limited information. To enhance the CMA's benefit to a client, use the edit feature, when possible, to manually add information.

### ***Search and Select Comparable Properties***

Search comparables by criteria (New Search) or by map (Map Search).

1. At the Comparables tab, click **Search Listings** or **Search Public Records**. You can also **Add by ML#** or **Add from Listing Cart**.

2. At the Search Listings or Search Public Records dialog box, select one or more statuses for the comps you want to find.
3. Enter a **price range** and **date range** then click **Continue**.
4. At the Criteria page, enter and select **criteria** as needed. To limit matches to a particular location by drawing a radius or polygon, click **Map**. Click **Submit**.
5. At the search results List, select one or more comparable properties, then click **Add to Comparables** or **Replace Comparables**, as needed.
6. You may add additional comps, save, and navigate to the next CMA section.

### ***Manage Comparables for the CMA Presentation***

Once selected from search results, comparables display in a single list. The CMA uses every property displayed in the list with the exception of those you *exclude*. Excluded properties remain in the list but are grayed out. To include one of these excluded properties later, select it and click *Include*. (Properties you *remove* no longer appear in the list.)

**Exclude:** Excludes a property from the current CMA report, but allows future inclusion

**Include:** Resets an excluded property to included, thereby reversing the exclude action

**Remove:** Deletes the property from the comparables list.

1. Select properties you want to remove altogether, then click **Remove**.
2. Select properties you want to exclude from the current presentation (without removing it altogether), then click **Exclude**.
3. To include a property you previously excluded, select the property, then click **Include**.

### ***Add Comps by ML#***

1. Click **Add by ML#**.
2. At the Add ML#s dialog box, enter one or more numbers then click **Add**.
3. You may add additional comps, save, and navigate to the next CMA section.

### ***Add Comps from the Listing Cart***

1. Click **Add from Listing Cart**. When prompted, click **Yes** or **No** to emptying your Listing Cart.
2. You may add additional comps, save, and navigate to the next CMA section.

## Edits & Adjustments

Once you choose the comparables for your CMA, you may adjust property details to reflect the most recent and accurate information, so that the system can adjust the comparable's value for accurate comparison with the subject property.

At the Adjustments section, type a descriptive item in the Edits column, then enter a positive or negative dollar amount in the Adjustments column.

One by one, the Edits & Adjustments section displays a comparable side-by-side with the subject property, if one is included. Click the right and left arrows at the top of the worksheet to navigate through all the selected comparables. Click View Broker Full to view the comparable with edits.

Edits and adjustments are applied to the CMA only, and do not affect the listing or public record.

### *Edits*

To note a beneficial or detrimental feature in the current comparable, use the Edit column, wherever a text box displays. Edits display on the property's detail form.

### *Adjustments*

To adjust a comparable's price to reflect a beneficial feature you've corrected, type a positive value, for example 5000. To adjust the price to reflect a missing or detrimental feature you've corrected, type a negative value, for example -5000). The adjustment value must be a number and should not include a dollar sign, comma, or decimal. If the adjustment is negative, type a minus sign in front of the adjustment value. For example, type "-2500" to alert the system to subtract \$2,500—on the presentation—from the comparable's price. The system tallies all adjustments and determines the total adjustment.

If the adjustment is alphanumeric (for example, you change "N" to "Y"), determine as accurately as possible the effect this change should have on the adjusted price, and enter a numeric adjustment accordingly.

#### **Note:**

Adjustments are reflected on the CMA's side-by-side property comparison form, but not on the property's detail form.

### ***Adjust Comparables***

In the CMA presentation, the system automatically displays the subject property, if included, side-by-side with the first comparable. To make adjustments to the comparable price:

1. Scroll to any desired field where a text box indicates it may be adjusted.
2. At the **Note** column, type a brief description.
3. At the **Adjustments** column, enter a numeric adjustment.
4. Repeat steps 2 and 3 at additional fields, if needed.
5. Click **Save**, then click the **right arrow** at the top of the Comparables section to navigate to the next comparable.
6. **Repeat** all steps for each comparable.
7. When you are finished with adjustments, click **Save** and navigate to the next CMA section.

## **Marketing**

Your CMA can include a timetable of activities to demonstrate to prospective clients your plan for marketing their property.

### ***Tip:***

If desired, you can save a revised marketing plan as your default. Add or revise activities as needed for each new presentation.

### ***Create A Marketing Plan***

1. At the Marketing section, click **Add Activity**.
2. At **Timeframe**, enter the date (or step, number, or week) you anticipate for an activity.
3. At **Activity**, enter a description of the activity.
4. Repeat steps 2-3 as necessary until all activities are defined.
5. To rearrange activities, select one then click **Move Up** or **Move Down**. Repeat as necessary.
6. To remove activities select one then click **Delete**. At the confirmation prompt, click **Delete** again.
7. Optionally, to save this marketing plan for default use in new CMAs, click **Set As Default**.

## Attachments

Use the Attachments section to upload documents to the CMA.

### *Upload Attachments*

1. At the Attachments section, click **Upload**.
2. At the Upload Attachments dialog box, click **Browse**. Use your browser's instructions to navigate and open the file you want to upload.
3. Optionally, add or select a description.
4. Repeat steps 2-3 for each attachment you want to upload.
5. Click **Upload**.
6. At the CMA's Attachments section, optionally, drag and drop to re-order the attachments.

### *Preview Attachments*

Use the Preview action to open the attachment in preview form, or double click the thumbnail to open the document in its native application.

1. Select an attachment and click **Preview** on the action bar.
2. Select **The Current Section** and click **Preview**.
3. Click **Close** after reviewing the attachment.

### *Delete Attachments*

1. Select one or more attachments and click **Delete** on the action bar.
2. At the confirmation prompt, click **Delete**.

## Contents

Use the Contents section to select items you want to include in the CMA presentation.

- Check or uncheck an item to include or exclude it in this CMA
- Click to preview an item's content
- Drag an item up or down in the list to rearrange its order in this CMA

Select any or all of the following items for inclusion in the CMA presentation:



Cover Page  
Cover Letter  
Table of Contents  
Subject Property Details  
Subject Property Photo Gallery  
Side-by-Side Property Comparison  
Comparable Summary  
Edits & Adjustments  
Consumer Medium Detail Form  
Another selected Detail Form  
Consumer Thumbnail Form  
Photo Gallery  
Flyer  
Road or Aerial Map  
Market Statistics Report  
Days on Market Report  
Marketing Plan

### ***Generate the CMA Presentation***

1. At **Select Items to include in this CMA**, check or uncheck the items you want for this CMA
2. At **Order Statuses in Output**, choose a sort order for the display of comparables by status.
3. At **Include Page Numbers**, check or uncheck the box to include or exclude page numbering. Note: Page numbers do not display for the Cover Page, Cover Letter, and Contents.
4. Click **Save**. At the CMA Saved prompt, click **Close**.
5. To preview, print, send, download, and more, see “Work with CMAs” on page 218.

## Work with CMAs

Use the CMA main menu option to start or manage a CMA presentation. (See “About CMAs” on page 204.)

If you have no saved CMAs, the system prompts you to add one. If you’ve created one or more CMAs, they appear in a list. To update an existing CMA, double click on its row to open it. To add a CMA, click New CMA on the action bar.

If the CMA has unsaved changes, the system prompts you to keep or discard the changes. CMA will remember your unsaved information for thirty days, but it’s a good idea to save throughout your session to insure all information is stored.

### *Navigating the CMA*

When you click the CMA main menu option, a list of saved CMAs displays. When you open a CMA a tabbed set of CMA sections displays. (See “Data Entry at CMA Sections” on page 206.) To navigate in the CMA do one of the following:

- To jump to a particular section, click its tab at the top of the CMA
- To scroll through the CMA, use the scroll bar
- To move from field to field, press the Tab key
- To jump to each comparable in turn, at the Adjustments section, use Page Forward and Back arrows

### *Saving the CMA*

You can click Save as often as you want. Each time you click Save the system checks the CMA draft for valid entries. If the draft does not pass validation, click each flagged field to correct its entry.

When you save the CMA, the system saves new or changed contact information.

---

## How . . .

### *To Add a New CMA*

1. At the main menu, click **CMA**.

2. If no CMAs exist, the system prompts you to add one before you proceed. If one or more CMAs exists and displays in the CMA list, select **New CMA** on the action bar.
3. At **CMA Name**, enter a unique name for the presentation.
4. Select a **Class** and click **Continue**.
5. At the CMA detail edit form, scroll or tab to desired sections, and complete the information you want to include in the presentation. (See “Data Entry at CMA Sections” on page 206.)
6. Click **Save**. If prompted, make any needed corrections or additions, then click **Save** again.

#### ***To Open a CMA***

1. At the main menu, click **CMA**.
2. At the CMA list, choose “All” or “Due to Expire” from the **Show** dropdown list.
3. double click the row where the name of the desired CMA displays.

#### ***To Edit an Existing CMA***

1. Select a CMA then click **Edit** on the action bar, or just double click the row.
2. The CMA detail edit form displays.
3. Scroll or tab to the desired section. Note: To find a particular field, click the **Find** action, then enter the field name at the **Find a Field** dialog.
4. Enter, format, and upload information, as needed. (See “Data Entry at CMA Sections” on page 206.)
5. Click **Save**. If prompted, make any needed corrections or additions, then click **Save** again.

#### ***To Preview a CMA***

1. With a CMA open or selected, click **Preview** on the action bar.
2. At the Preview Options dialog box, choose what you would like to preview (the current section or the entire CMA) then click **Preview**.
3. Scroll to review, then click **Print** or **Close** as needed.

#### ***To Copy a CMA***

1. Select a CMA at the list, then click the **Copy** action.
2. At the New CMA dialog box, optionally edit or replace the CMA name. Click **Continue**.
3. The newly named copy displays on the list.

### **To Extend CMAs Due to Expire**

- To view *all* CMAs that are eligible for extension, click the **Extend** action at the CMA list *without selecting any*. To extend all eligible CMAs click **Yes** at the Extend CMA dialog box.
- To view *selected* CMAs that are eligible for extension, select one or more CMAs then click the **Extend** action at the CMA list. To extend all selected and eligible CMAs, click **Yes** at the Extend CMA dialog box.

### **To Rename a CMA**

1. At the CMA list, select a CMA checkbox, then click **Rename** on the action bar.
2. At the Rename CMA dialog box, edit the CMA name then click **Rename**.
3. At the CMA list, the new name displays.

### **To Delete a CMA**

1. At the CMA list, select one or more checkboxes, then click **Delete** on the action bar.
2. At the confirmation prompt, click **Delete**.

### **To Print a CMA**

1. Click **Print** on the action bar, after selecting a CMA at the list or at the open CMA.
2. At the Print Options dialog box, choose what you want to print (current section or the entire CMA).
3. Click **Print** (or to review the presentation before printing, click **Print Preview** then click **Print**).
4. At the browser's Print dialog box, select print options then click **Print**.

Note: You can also print a CMA from the Preview dialog box

### **To Send a CMA**

1. Click **Send** on the action bar, after you've selected a CMA at the list or at an open CMA.
2. At the Send dialog box, fill out the **To**, **Subject**, and **Message** sections. (See "Send Listings" on page 224.)
3. Optionally select **Send a copy to yourself**.

4. At the **Include Bcc** field, enter email addresses or Contacts to whom you want to send a blind copy. Note: Bcc addresses are visible only in the body of the Agent's copy. To avoid triggering a spam filter, the number of Bcc addresses is restricted.
5. Click **Send**.

#### ***To Download a CMA***

1. Click **Download** on the action bar, after selecting a CMA at the list or at the open CMA.
2. At the Download Ready dialog box, choose what you would like to download (current section or entire CMA).
3. Click **Download**.

#### ***To Reset or Clear Sections in an Open CMA***

Depending on the section at which you want to change information, Reset or Clear are available on the action bar.

- At the *Agent* and *Contents* tab pages, to reset all fields to the state they were in when the section was opened, click **Reset** on the action bar. At the confirmation prompt, click **Reset**.
- At the *Contact*, *Subject Property*, *Edits & Adjustments*, and *Marketing* tab pages, to clear all fields, click **Clear** on the action bar. At the confirmation prompt, click **Clear**.
- At the *cover page* and *cover letter* sections, to restore the default template click **Reset to MLS Default**



# Send Listings by Email

## Send Listings

You can email your customer a link to particular listings with the site action Send. Send is available at List, View, and Map. The Send action causes the system to email links to listings, allowing recipients to see each one with optional maps and photos. For Available listings at Details, you can also include attachments. Listings may be sent in detail view or as list rows.

The emailed link remains active for a period determined by the MLS. Format the message as you like, using the formatting toolbar. See “Formatting Email” on page 226.

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### How . . .

#### *To Create the Email Message*

1. To open the **Send** dialog box, click **Send** at the site action bar.
2. At the **To** field, enter one or more email addresses, or click **Contacts** to select one or more contacts by group or search.
3. At the **Include Bcc** field, enter email addresses or Contacts to whom you want to send a blind copy. Note: Bcc addresses are visible only in the body of the Agent’s copy. To avoid triggering a spam filter, the number of Bcc addresses is restricted.
4. At the **Subject** field, change or accept the default subject for the message.
5. In the **Message text** area, change or accept the default text.
6. Edit the message as required. Note: If your browser does not automatically perform a spell check and flag (or correct) spelling errors, click away from the message text area to run the spell check.
7. At **What do you want to send?**, choose **Detail Views** or **List Rows**.
8. At the **For** dropdown list, select the listings you want to send: Current, All, or Selected.
9. At the **Form** dropdown list, if you chose Detail Views at step 7, select a detail form in which your customer will view the listings. To send listing forms with no address, use a form such as Client Full - No Address. To send listing forms with an address (which allows you to send a map as well), use a form such as Client Full.
10. To send a duplicate message to your MLS email account, select the **Send Copy to Yourself** checkbox. (The form linked to from your copy of the email will always be Broker Full, regardless of the one you selected at step 7.)



11. To include a Photo Gallery along with the already-selected detail form, select the **Include Photo Gallery** checkbox. The checkbox is available only in one-per-page forms.
12. To include a map with your email, select the **Include Map** checkbox.
13. To include attachments for an Available listing that is currently displayed at Details, at **For**, select **Current Listing**, then at **Select Attachments to Include** select the attachments you want to send.
14. To send the email with included options, click **Send**.

### ***To Understand What the Recipient Receives***

When the email recipient opens your message and clicks “View Details”, a new window opens with the following options displayed for each listing, when chosen:

- A *Map* (if this option is available and you have selected it along with a results list that corresponds to the map’s marker numbers. Listings you selected for the recipient, along with available links, display on the map and the list below it. You can choose to include points of interest (Places) on the sent map.
- A *Detail form* or list rows for each emailed listing, with links included.
- A *Photo Gallery* for each emailed listing (if this option is available and selected).
- *Download* and *Print* actions.

### ***To Provide Instructions to the Recipient***

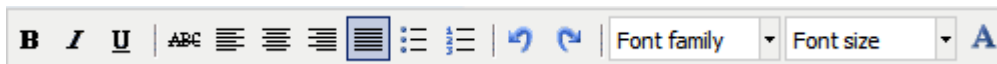
Instructions for viewing the properties and replying to the email are provided in the default email message. In the Message text area, change or accept the default text, including further instructions if you like.

Help for recipients is available at the properties of interest page.




## Formatting Email

To apply formatting such as bold or italic to any text or paragraph in an email message, select the text you want to format and choose a button from the toolbar. See “Send Listings” on page 224.

**Send Email Formatting Toolbar**



Format	Tool	Effect
Bold (Ctrl+B)		<b>these words are bold</b> and these are not.
Italic (Ctrl+I)		<i>these words are italic</i> and these are not.
Underline (Ctrl+U)		<u>these words are underlined</u> and these are not.
Strikethrough		In a sentence <del>these words are struck through</del> and these are not.
Align Left		This sentence is aligned left.
Align Centre		This sentence is aligned centre.
Align Right		This sentence is aligned right.
Align Full		This paragraph is aligned full (justified) in order to spread the words on each line from margin to margin. To achieve this affect, the system distributes space between words as needed. The last line of a fully aligned paragraph is aligned left.
Unordered list (Bulleted)		<ul style="list-style-type: none"> <li>• First bulleted item</li> <li>• Second bulleted item</li> </ul>
Ordered list (Numbered)		<ol style="list-style-type: none"> <li>1. First numbered item</li> <li>2. Second numbered item</li> </ol>

Undo (Ctrl+Z)		Click to undo the last change.
Redo (Ctrl+Y)		Click to restore the last undone change.
Font Family	<input type="text" value="Arial"/>	Click down arrow for a list of fonts to select from.
Font Size	<input type="text" value="3 (12 pt)"/>	Click down arrow for a list of font sizes. These words are 12pt
Select text color		these words are blue and these are red



# Update

## About Update

Update provides a report of new and changed listings in your market areas, presenting them in categories by status and class, for example New Residential and Back on Market. (See “Work with Update” on page 231.)

Customize Update by selecting your desired property class(es) and town(s). Select a time frame and a View (Display or Print), with or without notes and revisions.

- Once you assign Update settings, you can save them for future Updates. You can revise your Update settings at any time.
- The system keeps track of the date of your last Update. To run an Update representing all new and changed listings since your last report, select “Since Last Update” at the Days Back field. Alternatively, you can select the number of “Days Back” you want to run an Update (up to 14 days).
- You can rerun your last Update by choosing “Rerun Last Update” at the Days Back field.
- The Update displays thumbnail listings and a count for each category. You can scroll through all categories or go directly to a particular one by clicking on its corresponding link at the top of the Update.
- To view a listing’s full broker report, click on the ML# at the displayed thumbnail. Click Back to return to the Update report.
- Before running the report, you may choose to display or print the Update. To do both, select “Display” then, when you’re ready, click “Print View” at the displayed Update.

# Work with Update

---

## How . . .

### *To Create or Change Update Settings*

1. Select **Update** at the main menu.
2. At the Update page, select one or more **Class(es)**.
3. Select one or more **Town(s)**. To choose multiple towns, press and hold down the Ctrl key, then scroll and click on each town you want to select.
4. At **Days Back**, choose the time frame for the Update.
5. At **View**, choose **Display** or **Print**.
6. Select **Notes & Revisions** if you want to include these in the Update.
7. Click **Save Update**.

### *To Run Updates with Previous Settings*

1. Change **View** if needed.
2. Click **Update Now** to run the Update with the current saved settings.

### *To Display the Update*

If your View setting is Display, the Update report displays on screen. Listings are categorized by type.

- To see listings in a particular category, scroll through the report or click a link at the top of the page.
- To see a listing at View, click the linked ML#. At the report click **Back** to return to Update.

### *To Print the Update*

If your View setting is Print, the Update displays in a printable format in a secondary browser window. To print:

1. Run an Update with **View** set to **Print**.
2. At the printable display, choose **Print** from the browser's **File** menu.

3. Specify printer options.
4. Click **Print**.
5. Close the browser window to return to the Update page.

***To Display Listings from Update***

1. In the Update **Display** report displayed on the screen, click an ML#.
2. To print the listing, click **Print**.



# History

## About History

Stratus MLS tracks all listing edit changes, price changes, and status changes. The system also tracks all listings that have been linked over time to a property's public record.

### A Listing's Transaction History

By showing changes, in particular price reductions and prior offers, History helps you evaluate how motivated a seller is likely to be to accept an offer or lower a price.

You can view and print a listing's history at an MLS# search, at any search results List, and at View. When you view a listing's History, two forms display:

- The first form shows details of the listing as it was originally entered. Note: if you don't want to display the original listing, select the "Hide Original Listing Data" checkbox at the top left side of the history form.
- The second form shows changes made to the ML#'s fields, price, and status.

### A Property's Listing History Available at the Public Record

A history of listings associated with a particular property, if one or more have been linked, is visible at the property's public record. You can see days-on-market history and review every linked listing, whether current or archived, to research owner/renter history, price history, and other indicators of potential resale value.

## Work with History

You can view and print a listing's history at an MLS# search, at any search results List, and at View. See "About History" on page 234.

**Note:**

When pulling histories for several listings at once, it may be useful to select Hide Original Listing Data so that only transaction reports display.

---

### How . . .

#### *To View a Listing's History at MLS# Search*

1. At the Search Type page click **MLS# Search**.
2. At the **Search by MLS#** box, type one or more ML#'s separated by commas, spaces, or lines.
3. Click **View History**.

#### *To View a Listing's History at List*

1. At List, click to select one or more listings.
2. Click **History** on the action bar.

#### *To View a Listing's History at View*

1. At View, navigate to the listing for which you want to see History.
2. Click **History** on the action bar.

#### *To Hide Original Listing Data from the History Form*

1. At History, select the **Hide Original Listing Data** checkbox.
2. To restore original listing data after hiding it, clear the checkbox.

#### *To View Past and Current Listings Linked to a Public Record*

1. At any public record, scroll to the **Listing History** section at the bottom of the page.

2. Click any ML# to open the corresponding listing in detail view.

# About Financials

## About Financials

Financial options include tools for comprehensive financial analysis (such as Buyer Qualification, Buyer Closing Costs, Seller Net Proceeds) in addition to Home Financing Calculators that help to address frequently asked questions.

## Seller Net Proceeds

Seller Net Proceeds estimates the proceeds a seller receives at closing, with prepaid and unpaid expenses prorated. Choose from Conventional, Assumption, FHA and VA.

### *To Run Seller Net Proceeds*

1. At the **Financial Tools** tab, click **Seller Net Proceeds**.
2. At **Mortgage Type**, select Conventional, Assumption, FHA, or VA.
3. At **Prepare For**, enter the customer's name.
4. Complete data entry (find the table, below, for the desired mortgage type.)
5. Click **Submit** to view the report.
6. To print the report, click the **Print** icon then click **Print Preview** or **Print**, as needed.

---

## How . . .

### *To Enter Data for a Conventional Mortgage*

#### CONVENTIONAL

Field	Definition	Value
Sale Price	Sale price of house	Enter dollar amount (no \$ or ,)
Existing Balance	Balance due on seller's existing first mortgage	Enter dollar amount (no \$ or ,)
Interest Rate on Existing 1st Trust	Interest rate on seller's existing first mortgage	Enter percent (no % symbol)
Is Existing 1st Trust FHA?	1st mortgage type	Select Y if 1st mortgage to be paid off is FHA, otherwise select N
Existing Balance Additional Trusts	Balance due on seller's existing mortgages	Enter total dollar amount of all other existing trusts (no \$ or ,)

Interest Rate on Existing Additional Trusts	Interest rate on seller's existing additional mortgages	Enter percent (no % symbol)
Broker's Compensation	Total broker and co-broker fees	Enter dollar amount or percent (no \$ or , or % symbol)
New Base Loan Amount	Buyer's new first mortgage amount.	Enter dollar amount of buyer's 1st trust, per the contract
Points Paid By Seller	Number of points (if any) seller has agreed to pay for buyer's mortgage	Enter number of points, if any
Lender Fees/Misc	Miscellaneous fees seller must pay	Enter dollar amount (no \$ or ,)
Total Yearly Taxes	Annual total for all property taxes	Enter dollar amount for property taxes (no \$ or ,)
Taxes Paid Semi-Annually?	Payment period for taxes.	Select Y if taxes paid twice a year, otherwise select N
Monthly Condo/HOA Fees	Monthly condo or home owner's association fees	Enter dollar amount (no \$ or ,)
Settlement Fee	Settlement fee to title co. or attorney, if seller is to pay any	Enter dollar amount (no \$ or ,)
Pest Inspection	Fee for pest inspection, if seller is to pay any	Enter dollar amount (no \$ or ,)
Buyer's Closing Costs	Dollar amount of closing costs seller has agreed to pay on behalf of buyer	Enter dollar amount, if any, for purchaser costs paid by seller (no \$ or ,)
Condo/HOA Disclosures	Condo or home owner's association disclosures	Enter dollar amount (no \$ or ,)
Other Misc. Charges	Additional miscellaneous charges seller must pay	Enter dollar amount (no \$ or ,)
Closing Month	Expected month for closing	Select from drop-down



Closing Day	Expected day of the month for closing	list Select from drop-down list
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***To Enter Data for an Assumed Mortgage*****ASSUMPTION**

<b>Field</b>	<b>Definition</b>	<b>Value</b>
Sale Price	Sale price of house	Enter dollar amount (no \$ or ,)
Existing Balance	Balance due on seller's existing first mortgage	Enter dollar amount (no \$ or ,)
Interest Rate on Existing 1st Trust	Interest rate on seller's existing first mortgage	Enter percent (no % symbol)
Existing Balance Additional Trusts	Balance due on seller's existing mortgages	Enter total dollar amount of all other existing trusts (no \$ or ,)
Interest Rate on Existing Additional Trusts	Interest rate on seller's existing additional mortgages	Enter percent (no % symbol)
Sale of Escrow	Dollar amount if escrow is sold to buyer	Enter dollar amount (no \$ or ,)
Broker's Compensation	Total broker and co-broker fees	Enter dollar amount or percent (no \$ or , or % symbol)
Lender Fees/Misc	Miscellaneous fees seller must pay	Enter dollar amount (no \$ or ,)
Total Yearly Taxes	Annual total for all property taxes	Enter dollar amount for property taxes (no \$ or ,)
Taxes Paid Semi-Annually?	Payment period for taxes.	Select Y if taxes paid twice a year, otherwise select N
Monthly Condo/HOA Fees	Monthly condo or home owner's association fees	Enter dollar amount (no \$ or ,)

Settlement Fee	Settlement fee to title co. or attorney, if seller is to pay any	Enter dollar amount (no \$ or ,)
Pest Inspection	Fee for pest inspection, if seller is to pay any	Enter dollar amount (no \$ or ,)
Buyer's Closing Costs	Dollar amount of closing costs seller has agreed to pay on behalf of buyer	Enter dollar amount, if any, for purchaser costs paid by seller (no \$ or ,)
Condo/HOA Disclosures	Condo or home owner's association disclosures	Enter dollar amount (no \$ or ,)
Other Misc. Charges	Additional miscellaneous charges seller must pay	Enter dollar amount (no \$ or ,)
Closing Month	Expected month for closing	Select from drop-down list
Closing Day	Expected day of the month for closing	Select from drop-down list

***To Enter Data for an FHA Mortgage***

<b>FHA</b>		
<b>Field</b>	<b>Definition</b>	<b>Value</b>
Sale Price	Sale price of house	Enter dollar amount (no \$ or ,)
Existing Balance	Balance due on seller's existing first mortgage	Enter dollar amount (no \$ or ,)
Interest Rate on Existing 1st Trust	Interest rate on seller's existing first mortgage	Enter percent (no % symbol)
Is Existing 1st Trust FHA?	1st mortgage type	Select Y if 1st mortgage to be paid off is FHA, otherwise select N
Existing Balance Additional Trusts	Balance due on seller's existing mortgages	Enter total dollar amount of all other existing trusts (no \$ or ,)
Interest Rate on Existing	Interest rate on seller's existing	Enter percent (no %

Additional Trusts	additional mortgages	symbol)
Broker's Compensation	Total broker and co-broker fees	Enter dollar amount or percent (no \$ or , or % symbol)
New Base Loan Amount	Buyer's new first mortgage amount.	Enter dollar amount of buyer's 1st trust, per the contract
Condo ?	For FHA and VA, select Y if condo, or else, select N	Y if condo, or else, select N
Points Paid By Seller	Number of points (if any) seller has agreed to pay for buyer's mortgage	Enter number of points, if any
Lender Fees/Misc	Miscellaneous fees seller must pay	Enter dollar amount (no \$ or ,)
Total Yearly Taxes	Annual total for all property taxes	Enter dollar amount for property taxes (no \$ or ,)
Taxes Paid Semi-Annually?	Payment period for taxes.	Select Y if taxes paid twice a year, otherwise select N
Monthly Condo/HOA Fees	Monthly condo or home owner's association fees	Enter dollar amount (no \$ or ,)
Settlement Fee	Settlement fee to title co. or attorney, if seller is to pay any	Enter dollar amount (no \$ or ,)
Pest Inspection	Fee for pest inspection, if seller is to pay any	Enter dollar amount (no \$ or ,)
Buyer's Closing Costs	Dollar amount of closing costs seller has agreed to pay on behalf of buyer	Enter dollar amount, if any, for purchaser costs paid by seller (no \$ or ,)
Condo/HOA Disclosures	Condo or home owner's association disclosures	Enter dollar amount (no \$ or ,)
Other Misc. Charges	Additional miscellaneous charges seller must pay	Enter dollar amount (no \$ or ,)

Closing Month	Expected month for closing	Select from drop-down list
Closing Day	Expected day of the month for closing	Select from drop-down list

***To Enter Data for a VA Mortgage***

<b>VA</b>		
<b>Field</b>	<b>Definition</b>	<b>Value</b>
Sale Price	Sale price of house	Enter dollar amount (no \$ or ,)
Existing Balance	Balance due on seller's existing first mortgage	Enter dollar amount (no \$ or ,)
Interest Rate on Existing 1st Trust	Interest rate on seller's existing first mortgage	Enter percent (no % symbol)
Is Existing 1st Trust FHA?	1st mortgage type	Select Y if 1st mortgage to be paid off is FHA, otherwise select N
Existing Balance Additional Trusts	Balance due on seller's existing mortgages	Enter total dollar amount of all other existing trusts (no \$ or ,)
Interest Rate on Existing Additional Trusts	Interest rate on seller's existing additional mortgages	Enter percent (no % symbol)
Sale of Escrow	For Assumptions and VA, enter dollar amount if escrow is sold to buyer	Enter dollar amount (no \$ or ,)
Broker's Compensation	Total broker and co-broker fees	Enter dollar amount or percent (no \$ or , or % symbol)
New Base Loan Amount	Buyer's new first mortgage amount.	Enter dollar amount of buyer's 1st trust, per the contract
Condo ?	For FHA and VA, select Y if	Y if condo, or else, select

	condo, or else, select N	N
Points Paid By Seller	Number of points (if any) seller has agreed to pay for buyer's mortgage	Enter number of points, if any
Lender Fees/Misc	Miscellaneous fees seller must pay	Enter dollar amount (no \$ or ,)
Total Yearly Taxes	Annual total for all property taxes	Enter dollar amount for property taxes (no \$ or ,)
Taxes Paid Semi-Annually?	Payment period for taxes.	Select Y if taxes paid twice a year, otherwise select N
Monthly Condo/HOA Fees	Monthly condo or home owner's association fees	Enter dollar amount (no \$ or ,)
Settlement Fee	Settlement fee to title co. or attorney, if seller is to pay any	Enter dollar amount (no \$ or ,)
Pest Inspection	Fee for pest inspection, if seller is to pay any	Enter dollar amount (no \$ or ,)
Buyer's Closing Costs	Dollar amount of closing costs seller has agreed to pay on behalf of buyer	Enter dollar amount, if any, for purchaser costs paid by seller (no \$ or ,)
Condo/HOA Disclosures	Condo or home owner's association disclosures	Enter dollar amount (no \$ or ,)
Other Misc. Charges	Additional miscellaneous charges seller must pay	Enter dollar amount (no \$ or ,)
Closing Month	Expected month for closing	Select from drop-down list
Closing Day	Expected day of the month for closing	Select from drop-down list

## Buyer Closing Costs

Buyer Closing Costs estimates and displays the amount a buyer of residential property owes at the time of the closing. Choose a mortgage type: Conventional, Assumption, FHA, or VA.

### *To Run Buyer Closing Costs*

1. Select **Financial** at the main menu.
2. At the **Financial Toolstab**, click **Buyer Closing Costs**.
3. Select **Mortgage Type** from the drop down list.
4. At **Prepare For**, enter the buyer's name.
5. Enter data. (Find the data entry table, below, for the desired mortgage type.)
6. Click **Submit** to display the analysis.
7. To print the analysis, click the **Print** icon then click **Print Preview** or **Print**, as needed.

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## How . . .

### *To Enter Data for a Conventional Mortgage*

<b>CONVENTIONAL</b>		
<b>Field</b>	<b>Definition</b>	<b>Value</b>
Sale Price	Purchase price of house	Enter dollar amount (no \$ or ,)
Deposit Or Earnest Money	Total of all deposits paid in escrow	Enter dollar amount (no \$ or ,)
New Base Loan Amount	Dollar amount of loan (as per contract).	Enter dollar amount (no \$ or ,)
Interest Rate of New 1st Trust	Percent interest rate of first mortgage.	Enter percent (no %)

Loan Origination Fees	Fee or % to be paid for loan origination.	Enter dollar amount or percent (no \$ or %)
Discount Pts. 1st Trust	Discount points applied to first mortgage.	Enter dollar amount or percent (no \$ or %)
PMI/MIP	Private Mortgage Insurance	If appropriate estimate is provided for PMI premium
Loan Amount Additional Trusts	Dollar amount of additional mortgages.	Enter dollar amount of additional trusts (no \$ or ,)
Lender Fees/Misc.	Miscellaneous lender fees	Enter dollar amount (no \$ or ,)
Credit Reports	Fee for credit report.	Enter dollar amount (no \$ or ,)
Settlement Fee	Amount owed to Title Co. or Attorney for settlement.	Enter estimated dollar amount (no \$ or ,)
Total Yearly Taxes	Annual property taxes	Enter dollar amount for property taxes (no \$ or ,)
Paid Semi-Annually?	Payment period for taxes	Select Y if taxes paid twice a year, or else, select N
Monthly Condo/HOA Fees	Monthly fees assessed for condo or home owner's association fees.	Enter dollar amount (no \$ or ,)
Hazard Insurance Premium	Homeowner's insurance premium amount.	Enter dollar amount (no \$ or ,)
Number of Months to Escrow	Number of months required for tax escrow.	Enter number of months to be escrowed at settlement table
Appraisal	Lender appraisal fee	Enter dollar amount (no \$ or ,)
Incl Owner's Title Insurance?	Include owner's title insurance in this estimate?	Select Y if purchasing Owner's coverage, select

		N for Lender's only
Survey	Survey expense.	Enter dollar amount (no \$ or ,)
Other Misc. Charges	Miscellaneous fees may include loan assumption fees, personal property purchase fees, more	Enter dollar amount (no \$ or ,)
Closing Month	Expected month of closing.	Select from drop-down list
Closing Day	Expected day of the month for closing.	Select from drop-down list

***To Enter Data for an Assumption Mortgage*****ASSUMPTION**

<b>Field</b>	<b>Definition</b>	<b>Value</b>
Sale Price	Purchase price of house	Enter dollar amount (no \$ or ,)
Deposit Or Earnest Money	Total of all deposits paid in escrow	Enter dollar amount (no \$ or ,)
New Base Loan Amount	Dollar amount of loan (as per contract).	Enter dollar amount (no \$ or ,)
Interest Rate of New 1st Trust	Percent interest rate of first mortgage.	Enter percent (no %)
Loan Amount Additional Trusts	Dollar amount of additional mortgages.	Enter dollar amount of additional trusts (no \$ or ,)
Assume Additional Trusts?	Are additional trusts being assumed?	Select Y if additional trusts are assumed, N if additional trusts are originated.
Interest Rate Additional Trusts	Percent interest rate of additional trusts.	Enter percent (no %)
Purchase of Escrows	Dollar cost of escrows, if any.	Enter dollar cost of



		escrows (no \$ or ,) if any.
Lender Fees/Misc.	Miscellaneous lender fees	Enter dollar amount (no \$ or ,)
Credit Reports	Fee for credit report.	Enter dollar amount (no \$ or ,)
Settlement Fee	Amount owed to Title Co. or Attorney for settlement.	Enter estimated dollar amount (no \$ or ,)
Total Yearly Taxes	Annual property taxes	Enter dollar amount for property taxes (no \$ or ,)
Paid Semi-Annually?	Payment period for taxes	Select Y if taxes paid twice a year, or else, select N
Monthly Condo/HOA Fees	Monthly fees assessed for condo or home owner's association fees.	Enter dollar amount (no \$ or ,)
Hazard Insurance Premium	Homeowner's insurance premium amount.	Enter dollar amount (no \$ or ,)
Number of Month to Escrow	Number of months required for tax escrow.	Enter number of months to be escrowed at settlement table
Other Misc. Charges	Miscellaneous fees may include loan assumption fees, personal property purchase fees, more	Enter dollar amount (no \$ or ,)
Closing Month	Expected month of closing.	Select from drop-down list
Closing Day	Expected day of the month for closing.	Select from drop-down list

***To Enter Data for an FHA Mortgage***

<b>FHA</b>		
<b>Field</b>	<b>Definition</b>	<b>Value</b>
Sale Price	Purchase price of house	Enter dollar amount (no \$ or ,)

Deposit Or Earnest Money	Total of all deposits paid in escrow	Enter dollar amount (no \$ or ,)
New Base Loan Amount	Estimate of max. loan amount provided.	Enter dollar amount (no \$ or ,)
Interest Rate of New 1st Trust	Percent interest rate of first mortgage.	Enter percent (no %)
Loan Origination Fees	Fee or % to be paid for loan origination.	Enter dollar amount or percent (no \$ or %)
Discount Pts. 1st Trust	Discount points applied to first mortgage.	Enter dollar amount or percent (no \$ or %)
Loan Amount Additional Trusts	Dollar amount of additional mortgages.	Enter dollar amount of additional trusts (no \$ or ,)
Lender Fees/Misc.	Miscellaneous lender fees	Enter dollar amount (no \$ or ,)
Credit Reports	Fee for credit report.	Enter dollar amount (no \$ or ,)
Settlement Fee	Amount owed to Title Co. or Attorney for settlement.	Enter estimated dollar amount (no \$ or ,)
Total Yearly Taxes	Annual property taxes	Enter dollar amount for property taxes (no \$ or ,)
Paid Semi-Annually?	Payment period for taxes	Select Y if taxes paid twice a year, select N if not
Monthly Condo/HOA Fees	Monthly fees assessed for condo or home owner's association fees.	Enter dollar amount (no \$ or ,)
Condo?	Is the mortgage for a Condo?	Select Y if condo, N if not
Hazard Insurance Premium	Homeowner's insurance premium amount.	Enter dollar amount (no \$ or ,)
Number of Months to Escrow	Number of months required for tax escrow.	Enter number of months to be escrowed at settlement table

Appraisal	Appraisal fee	Enter dollar amount (no \$ or ,)
Incl Owner's Title Insurance?	Include owner's title insurance in this estimate?	Select Y if purchasing Owner's coverage, or N for Lender's only
Other Misc. Charges	Miscellaneous fees may include loan assumption fees, personal property purchase fees, etc.	Enter dollar amount (no \$ or ,)
Closing Month	Expected month of closing.	Select from drop-down list
Closing Day	Expected day of the month for closing.	Select from drop-down list

***To Enter Data for a VA Mortgage***

<b>VA</b>		
<b>Field</b>	<b>Definition</b>	<b>Value</b>
Sale Price	Purchase price of house	Enter dollar amount (no \$ or ,)
Deposit Or Earnest Money	Total of all deposits paid in escrow	Enter dollar amount (no \$ or ,)
New Base Loan Amount	Dollar amount of loan (as per contract).	Enter dollar amount (no \$ or ,)
Interest Rate of New 1st Trust	Percent interest rate of first mortgage.	Enter percent (no %)
Loan Origination Fees	Fee or % to be paid for loan origination.	Enter dollar amount or percent (no \$ or %)
Discount Pts. 1st Trust	Discount points applied to first mortgage.	Enter dollar amount or percent (no \$ or %)
Loan Amount Additional Trusts	Dollar amount of additional mortgages.	Enter dollar amount of additional trusts (no \$ or ,)
Lender Fees/Misc.	Miscellaneous lender fees	Enter dollar amount (no \$

		or ,)
Credit Reports	Fee for credit report.	Enter dollar amount (no \$ or ,)
Settlement Fee	Amount owed to Title Co. or Attorney for settlement.	Enter estimated dollar amount (no \$ or ,)
Total Yearly Taxes	Annual property taxes	Enter dollar amount for property taxes (no \$ or ,)
Paid Semi-Annually?	Payment period for taxes	Select Y if taxes paid twice a year, or select N
Monthly Condo/HOA Fees	Monthly fees assessed for condo or home owner's association fees.	Enter dollar amount (no \$ or ,)
Hazard Insurance Premium	Homeowner's insurance premium amount.	Enter dollar amount (no \$ or ,)
Number of Months to Escrow	Number of months required for tax escrow.	Enter number of months to be escrowed at settlement table
Appraisal	Lender appraisal fee.	Enter dollar amount (no \$ or ,)
Incl Owner's Title Insurance?	Include owner's title insurance in this estimate?	Select Y if purchasing Owner's coverage, or N for Lender's only
Survey	Survey expense	Enter dollar amount (no \$ or ,)
Other Misc. Charges	Miscellaneous fees may include loan assumption fees, personal property purchase fees, more	Enter dollar amount (no \$ or ,)
Closing Month	Expected month of closing.	Select from drop-down list
Closing Day	Expected day of the month for closing.	Select from drop-down list

## Buyer Qualification

Buyer Qualification helps determine what mortgage amount a buyer may qualify for. You can run Buyer Qualification to estimate any or all of the following:

- Maximum Principal and Interest Payment (Standard)
- Minimum Income
- Maximum Debt

**Note:**

The Stratus MLS Buyer Qualification program does not certify a buyer's eligibility for a particular loan amount; the lender must provide such certification.

### *To Run a Buyer Qualification*

1. At the **Financial Toolstab**, click **Buyer Closing Costs**.
2. Select the **Calculation Type** from the drop-down list.
3. At **Prepare For**, enter the buyer's name.
4. Enter data. (Find the data entry table, below, for the desired mortgage type.)
5. Click **Submit** to display the analysis.
6. To print the analysis, click the **Print** icon then click **Print Preview** or **Print**, as needed.

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## How . . .

### *Data Entry for Standard Buyer Qualification*

#### STANDARD

Field	Definition	Value
Prepare For	Buyer's name	Enter buyer's name
Yearly Income:		
Salary 1-4	Buyers' principal salaries (up to	Enter dollar values (no \$

	four yearly salaries)	or ,)
Rental Income	Total yearly income from rental properties, if any. (Assumes a 25% vacancy factor).	Enter dollar value (no \$ or ,)

Other Income 1-4	Dollar values for up to four additional annual income amounts	Enter dollar values (no \$ or ,)
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**Monthly Debt**

Automobile Loans	Monthly auto loan payment	Enter dollar value (no \$ or ,)
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Credit Cards	Monthly credit card payment	Enter dollar value (no \$ or ,)
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Child Support/Alimony	Monthly child support or alimony payment	Enter dollar value (no \$ or ,)
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Installment Loans	Monthly payment on installment loans	Enter dollar value (no \$ or ,)
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Other Debts	Other monthly payments	Enter dollar value (no \$ or ,)
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**Ratio Information:**

Front Ratio (%)	Lender's allowed Front End Ratio (Max PITI payments as a percent of buyer's gross annual household income)	Enter percent (no %)
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Back Ratio (%)	Lender's allowed Back End Ratio (Max payment toward total debt as a percent of buyer's gross annual household income)	Enter percent (no %)
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**Other Expenses:**

Taxes	Annual property taxes	Enter dollar value (no \$ or ,)
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Insurance	Home owner's insurance premium	Enter dollar value (no \$ or ,)
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HOA/Condo Fees	Condo or home owner's	Enter dollar value (no \$ or ,)
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	association fees	,)
PMI/MIP	Private Mortgage Insurance, if any	Enter dollar value (no \$ or ,)
Other	Miscellaneous expenses not covered above	Enter dollar value (no \$ or ,)

**Data Entry for Minimum Income Calculation****MINIMUM INCOME**

<b>Field</b>	<b>Description</b>	<b>Value</b>
Prepare For	Buyer's name	Enter buyer's name
<b>Maximum Total Monthly Payment:</b>	The maximum PITI amount the purchaser is willing to pay per month.	Enter dollar amount (no \$ or ,)
<b>Monthly Debt:</b>		
Automobile Loans	Monthly auto loan payment	Enter dollar value (no \$ or ,)
Credit Cards	Monthly credit card payment	Enter dollar value (no \$ or ,)
Child Support/Alimony	Monthly child support or alimony payment	Enter dollar value (no \$ or ,)
Installment Loans	Monthly payment on installment loans	Enter dollar value (no \$ or ,)
Other Debts	Other monthly payments	Enter dollar value (no \$ or ,)
<b>Ratio Information:</b>		
Front Ratio (%)	Lender's allowed Front End Ratio (Max PITI payments as a percent of buyer's gross annual household income)	Enter percent (no %)
Back Ratio (%)	Lender's allowed Back End Ratio (Max payment toward total debt as a percent of buyer's gross annual	Enter percent (no %)

household income)

**Other Expenses:**

Taxes	Annual property taxes	Enter dollar value (no \$ or ,)
Insurance	Home owner's insurance premium	Enter dollar value (no \$ or ,)
HOA/Condo Fees	Condo or home owner's association fees	Enter dollar value (no \$ or ,)
PMI/MIP	Private Mortgage Insurance, if any	Enter dollar value (no \$ or ,)
Other	Miscellaneous expenses not covered above	Enter dollar value (no \$ or ,)

***To Enter Data for Maximum Debt Allowed Calculation***

**MAXIMUM DEBT ALLOWED**

<b>Field</b>	<b>Description</b>	<b>Value</b>
Prepare For	Buyer's name	Enter buyer's name
<b>Maximum Total Monthly Payment:</b>	The maximum PITI amount the purchaser is willing to pay per month.	Enter dollar amount (no \$ or ,)
<b>Yearly Income:</b>		
Salary 1-4	Buyers' principal salaries (up to four yearly salaries)	Enter dollar value (no \$ or ,)
Rental Income	Total yearly income from rental properties (if any). (Program assumes a 25% vacancy factor).	Enter dollar value (no \$ or ,)
Other Income 1-4	Dollar values for up to four additional annual incomes	Enter dollar value (no \$ or ,)
<b>Ratio Information:</b>		
Front Ratio (%)	PIT maximum % (e.g., 28% of gross annual household income)	Enter percent (no %)



Back Ratio (%)	PIT minimum % (e.g., 36% of gross annual household income)	Enter percent (no %)
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**Additional Monthly Payment Expense Items:**

Taxes	Annual property taxes	Enter dollar value (no \$ or ,)
Insurance	Home owner's insurance premium	Enter dollar value (no \$ or ,)
HOA/Condo Fees	Condo or home owner's association fees	Enter dollar value (no \$ or ,)
PMI/MIP	Private Mortgage Insurance, if any	Enter dollar value (no \$ or ,)
Other	Miscellaneous expenses not covered above	Enter dollar value (no \$ or ,)

# Mortgage Calculator

Use the Mortgage Calculator to determine a buyer's monthly or yearly mortgage payments, based on purchase price and interest rate, or to determine the purchase price a buyer can afford. Optionally show the full mortgage schedule.

## *To Run Mortgage Calculator*

1. At the **Financial Tools** tab, click **Mortgage Calculator**.
2. At **Calculation Type**, select Payments or Affordability.
3. At **Prepare For**, enter the customer's name.
4. Enter **Loan Information** data. (Find the data entry table, below, for the desired calculation type.)
5. Click **Submit** to view the report.
6. Optional: To show the mortgage schedule, at **Payment Schedule**, select either Monthly Payments or Yearly Payments, then click **Show Schedule**.
7. To print the report, click the **Print** icon then click **Print Preview** or **Print**, as needed.

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## How . . .

### *To Enter Data for a Payments Report*

<b>PAYMENTS</b>		
<b>Field</b>	<b>Definition</b>	<b>Value</b>
Home Price	Purchase price	Enter dollar amount (no \$ or ,)
Down Payment	Amount available for a down payment	Enter dollar amount (no \$ or ,); or enter a percentage in the text box to the right then click Calculate
Rate	Percent interest rate of mortgage	Enter percent (no % )
Period (Years)	Number of years to pay off	Enter a number (no , )

mortgage

*To Enter Data for an Affordability Report*

**AFFORDABILITY**

<b>Field</b>	<b>Definition</b>	<b>Value</b>
Monthly Payment	Maximum monthly payment the buyer can afford	Enter dollar amount (no \$ or ,)
Down Payment	Amount available for a down payment	Enter dollar amount (no \$ or ,)
Rate	Percent interest rate of mortgage	Enter percent (no % )
Period (Years)	Number of years to pay off mortgage	Enter a number (no , )

## Buy vs Rent

Buy vs Rent analyzes the financial advantage in buying a home versus renting one. The report includes a buyer's increase in home equity as well as savings on income tax and rent.

### *To Run Buy vs Rent*

1. Select **Financial** at the main menu.
2. At the **Financial Tools** tab, click **Buy Vs Rent**.
3. At **Prepare For**, enter the customer's name.
4. Enter data. (See "Data Entry for Buy vs. Rent," below.)
5. Click **Submit** to view the report.
6. To print the report, click the **Print** icon then click **Print Preview** or **Print**, as needed.

### *Data Entry for Buy vs Rent*

<b>Field</b>	<b>Definition</b>	<b>Value</b>
Prepare for	Client's name	Enter buyer's name
Purchase Price	Purchase price of house	Enter dollar amount (no \$ or ,)
Mortgage Amount	Amount of mortgage	Enter dollar amount (no \$ or ,)
Desired Term of Mortgage (years)	Term of mortgage (e.g., 15, 30)	Enter number of years
Mortgage Rate (Fixed Full Term)	Interest rate of mortgage	Enter interest percent (no %)
Home Appreciation Rate	Avg. annual rate of appreciation for home of this type in this locale	Enter average annual percent (no %)
Purchaser's Tax Bracket	Purchaser's income tax bracket (State & Fed combined)	Enter percent (no %)

Annual Real Estate Taxes	Dollar amount of the property's estimated annual real estate taxes	Enter estimated dollar amount (no \$ or ,)
Real Estate Taxes Appreciation Rate	Average annual rate of appreciation in real estate tax	Enter average percent (no %)
Monthly Rental Payments	Buyer's present or projected monthly rental payment	Enter dollar amount of the buyer's present or projected monthly rent (no \$ or ,)
Five Year Increment Starting With	Enter a number representing the year for which you want to begin the 5-year analysis. "1" means start with first year.	Enter number

## Home Financing Calculators

Home Financing Calculators are provided by MLSLI for its membership. You can access help upon launching each calculator.

Calculators include:

### ***How much can I borrow?***

Calculates a range of monthly mortgage payments for both aggressive and conservative underwriting scenarios.

### ***How much will my mortgage payments be?***

Calculates monthly mortgage payment for a given loan amount, interest rate, and loan term.

### ***How much will my adjustable rate payments be?***

Calculates monthly payments for an adjustable-rate mortgage (ARM) loan, given a loan amount and loan terms.

### ***Which is better: fixed or adjustable?***

Calculates the monthly mortgage payment for a fixed- and adjustable-rate mortgage (ARM) loan, given their respective interest rates and other loan terms.

### ***Should I pay points to lower the rate?***

Calculates the monthly mortgage payment for two mortgage loans, given their respective interest rates and other loan terms, and helps a buyer determine whether paying additional points in exchange for a lower interest rate is a good deal.

### ***Which is better: 15- or 30-year loan term?***

Calculates monthly payments for two fixed-rate mortgage loans and helps buyers determine which loan is the better deal.

***How much should I put down for a new home?***

Calculates your monthly mortgage payment for two loans, given a down payment and other loan terms.

***How much can I save in taxes?***

Shows a buyer's average yearly tax savings on a mortgage loan and calculates the loan's after-tax interest rate.

***What will my closing costs be?***

Calculates a buyer's mortgage closing costs for a given set of loan terms, grouping costs into origination charges and other settlement services.

***Am I better off renting?***

Calculates whether buying a home is a better deal than renting, weighing the potentially smaller monthly cash outflow with a rental against a combined mortgage payment that includes principal, interest, insurance, taxes, and possible mortgage insurance.

***Am I better off refinancing?***

Calculates whether the decision to refinance a mortgage is a good one based on the terms entered for a current loan and for the refinance loan.

***What will my refinancing costs be?***

Calculates closing costs for a given set of loan terms, grouping costs into origination charges and other settlement services

***How can I reduce mortgage insurance costs?***

Estimates monthly payments for private mortgage insurance (PMI) over a range of down payments.

***Which lender has the better loan?***

Calculates which of two mortgage loans is the better deal. Either or both of the loans may be fixed- or adjustable-rate loans.

***Which loan is better?***

Calculates which of two mortgage loans is the better deal. Either or both of the loans may be fixed- or adjustable-rate (ARMs) loans.

***How advantageous are extra payments?***

Calculates the total mortgage interest paid with and without making prepayments for a given set of loan terms. It also calculates how many months it will take to pay off the loan with and without making extra payments.

***What home can I afford?***

Calculates the size of a mortgage loan a buyer may be able to afford for a given down payment and total monthly loan payment.



# Custom Column Sets

## About Customize Columns

Customize Columns, available at any results list, allows you to create a new column set from scratch or change an existing one. If you have the required permissions, you can save and share the new or changed set.

At the Customize Columns dialog box, information for each selected column heading displays, and can be changed. You may also use the dialog box to define or change sort order for multiple columns.

- To create a new column set, click Create New and use the Add a Column dropdown list to add fields one at a time to the Edit Columns worksheet. Once you have added columns assign a label, column width, alignment, data-type format, and decimal places for each column. You can also remove columns or rearrange their order with the Move Up and Move Down buttons.
- To edit an existing column set, choose the set you want to change from the Column Set dropdown list.

**Note:**

The list of fields available for inclusion in the column set is appropriate for the particular class for which listings have been found. If you create or edit a custom column set for listings found across more than one class, the list of fields available includes *all* fields for *each class*.

## Customize a Column Set

Wherever a search results list displays, you can choose the column set format you want. If you want to change or add to a set, you can create your own custom set or edit an existing one in the Customize Columns Editor. You can also make temporary changes to a column set.

The Edit Columns worksheet displays information for each column heading:

Item	Definition
<b>Name (system-assigned)</b>	The column's system-assigned field name, added as you select fields from the Add a Column dropdown list.
<b>Label (user-assigned)</b>	The column heading. Accept or change as desired. It is this label that displays at the search results list.
<b>Width</b>	Maximum column width. Accept or change as desired. Note: The auto-filled width reflects the field's longest value. If you decrease the auto-filled width, field values may be truncated in the column set when displayed in a list.
<b>Alignment</b>	Column justification: Left, Center, and Right. Accept or change Alignment at the dropdown list.
<b>Format</b>	The column data type; for example, Currency, Decimal, Text. The dropdown list displays appropriate choices for the column.
<b>Decimals</b>	Number of decimal places for numeric columns. Accept or change as desired.

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## How . . .

### *To Create a New Column Set*

1. At any results list, click **Customize** to display the Customize Columns dialog box.
2. At the **Customize Columns** dialog, click **Create New**. The worksheet clears so that you can add columns, define column properties, and reorder the columns.
3. At the **Add a Column** dropdown list, select each field you want to include as a column in your new column set. Each column and its properties is represented as a row.
4. You may accept all system-assigned column properties, or change them as needed by referring to the table above.
5. Reorder and remove columns as described below.

6. Click **Save** and enter a name. Click **Save** again.

#### ***To Edit an Existing Column Set***

1. At any results **List**, open the Columns dropdown list.
2. Choose a **column set** from the dropdown list.
3. Click **Customize** to display the set.
4. Make desired changes then click **Save**.
5. At the **Save Column Set** dialog box click **Save**); or to save a new copy of the set click **Save As**, type a unique name, then click **Save**.

#### ***To Reorder Columns***

The order in which you position each column determines its placement (from left to right) at the search results list.

- At **Edit Columns**:

To move a column up, select its checkbox and click **Move Up** as many times as needed.

To move a column down, select its checkbox and click **Move Down** as many times as needed.

#### ***To Remove a Column From the Set***

1. At **Edit Columns**, select a column's checkbox.
2. Click **Remove**.

#### ***To Save a New or Changed Column Set***

1. At **Edit Columns**, define fields and properties.
2. At the **Save Column Set** dialog box click **Save**); or to save a new copy of the set click **Save As**, type a unique name, then click **Save**.
3. The system makes the column set available at the **Columns** dropdown list at any search results page.

#### ***To Use an Unsaved Column Set Temporarily***

1. At **Edit Columns**, define appropriate fields and properties.
2. Click **Use Without Saving**.

3. The system uses your modified set to display the current search results.

#### ***To Share a Column Set***

1. At the **Customize Columns** dialog box, open the **Column Set** dropdown list.
2. Select a column set.
3. Click **Share**.
4. At the Share Column Set dialog, click **My Office** to share with others in your office.
5. Click **Share**.

#### ***To Rename or Delete a Column Set***

1. Choose the column set you want to rename or delete from the **Column** dropdown list. You must have permission to do so.
2. To rename the set, click **Rename**. To delete the set, click **Delete**.
3. When renaming, the **Rename Column Set** dialog box displays with the current name.
4. Clear and enter the desired name, click **Rename**, then click **OK** at the confirmation prompt.
5. The system reflects the renamed or deleted column set in the **Columns** dropdown list.

#### ***To Define a Multi-Level Sort for a Column Set***

You can define a multi-level sort for the column set by up to three columns. For example, main category *Town*, second category *Style*, third category *Price*. In this case, the results are sorted by Town, within Town by Style, and within Style by Price. In this case, Town is the first column, Style is the second, and Price is the third.

To choose the first column for the sort, choose a column from the Sort By dropdown list. You must also choose a sort order for the column: Ascending (low to high) or Descending (high to low). Choose a second column, if desired, from the newly-revealed Then By dropdown list. Choose a third column, if desired, from the next Then By dropdown list.

1. At **Multi-Level Sort**, select a column from the **Sort By** dropdown list, then choose **Ascending** or **Descending**.
2. At **Then By**, select another column then choose **Ascending** or **Descending**.
3. Repeat step 2 if desired.
4. Click **Save**.

**Note:**

It is not necessary to define a multi-level sort for every column set. To temporarily sort by a particular column while viewing search results, click the column heading once to sort in ascending order, then click again to sort in descending order.

***To Import Column Sets from the Legacy System***

1. Click **Import Your Column Sets**.
2. At the Import Column Sets dialog box, click **Import**.

**Note:**

The function imports all of your office saved custom one-line reports as column sets, for you alone. The imported column sets are not shared with anyone in your office.

If you click the import link more than once, duplicates are imported.

To share the imports with your office, optionally change, then save and share the column sets.

***To Delete Imported Column Sets***

- Click the **Delete Unused Imported Column Sets** to delete imported sets that you won't be using, modifying, or sharing.

# Market Share Analysis

## About Market Share

Market Share provides a ranked analysis of listing inventory by office, for the location you specify. You can rank offices by number of units or dollar volume, and group them by office or firm. The analysis can include all MLS offices, top offices, your office versus the entire MLS, or offices you specify by name. All reports may be limited to a particular price range, and some may be limited to particular dates.

Stratus provides market share reports for current availables and under-contracts; as well as for listings taken, under-contracts, and closings transacted within a date range you specify.

- See “Set Up Market Share Criteria” on page 273 for a discussion of data entry.
- Customize the market share report by specifying a price range or a date range for date-specific transactions.
- You can view, print, and graph the report, and save graphs in PDF format.
- Once you create your Market Share criteria settings, you can save them to run again; see “Saved Market Share Criteria” on page 276.
- To view all the relevant listings for offices displayed on the report, click on the office link. Listings display in search result format.
- Sort the generated report by clicking a column heading. Click once to sort from low-to-high; click again to sort from high-to-low.



# Set Up Market Share Criteria

Stratus indicates required fields with a blue asterisk \*. Enter data at all required fields.

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## How . . .

### *To Select the Geographic Area*

- At **Select Geographic Area for your Market Share Analysis**, click to select Town, Zone, or County from the list boxes. (CTRL+Click for multiple selections). To de-select all options in a list, click on the blank area at the top of the list.

### *To Select Transactions*

- At **Select Which Side of Transaction**, click to select the type of transactions you want Market Share to rank. The choices are:

**Available Inventory:** all listings currently available

**Listings Taken During a Specified Period:** listings of any status that were listed during a date range you specify

**All Listings Currently Under Contract:** all listings currently under contract

**Under Contracts During a Specified Period:** listings going under-contract during a date range you specify

**Closings During a Specified Period:** listings closed during a date range you specify

### *To Select the Transaction Side*

- At **Select Which Side of Transaction** (available only if you selected Closings or Under-Contract transactions above), which Listing Side Only, Sales Side Only, or Both Sides, depending on what you want Market Share to rank. (Note: If an office lists and sells the same listing, the report reflects both transactions.)

### *To Select Office Categories*

- At **Select Offices to Include** choose one of the following ranking categories:

**Top 5, 10, 25, 50, 100:** The system ranks all offices that match your search criteria, but the Market Share report is limited to a particular number of top-ranked offices. “Totals Shown” sums the volume for the displayed offices. “Totals Entire Report” sums the volume for all offices meeting the search criteria, including those not displayed.

**All:** The system ranks, displays, and totals all offices matching the search criteria.

**Your office vs. the entire MLS:** The report includes a display of your office alone, but it is ranked against all offices that match the search criteria. “Totals Shown” displays your office’s total volume. “Totals Entire Report” sums the volume for all offices matching the search criteria.

**Select specific offices:** Only offices you specify display in the report, but they are ranked against all offices meeting the search criteria. “Totals Shown” sums the volume for the displayed offices. “Totals Entire Report” sums the volume for all offices meeting the search criteria. See “To Select Specific Offices”, below.

### ***To Select Specific Offices***

At **Specific Offices to Include**, available only if you chose “Select specific offices” above, use look up office names as follows:

1. At **Starts With**, type the first character(s) of an office name.
2. Click (or tab) away from Starts With in order to fill the list box with offices matching your lookup text.
3. Scroll through the choices and select one or more offices from the list. CTRL+Click each when selecting more than one.
4. Click **Add** to move current selections to the lower list box, then make additional selections. Repeat as necessary.
5. Repeat steps 1-4 as necessary to add all the desired offices.

### ***To Select Property Classes***

- At **Select Classes of Property to Include**, select one or more property classes, such as Residential, Commercial/Industrial.

### ***To Set a Date Range***

Available only if you chose transactions that fall within a particular date range.

1. At **Enter Date Range for Analysis:** at **From**, enter the earliest date in the range.
2. At **To**, enter the latest date in the range.

### ***To Set a Price Range***

Available for any transaction type. Enter a price range to insure that the analysis isn’t skewed by a few very high-priced (or low-priced) listings; to rank offices according to listings that fall only within the price range your office handles; and/or to customize a report for a particular range of prices.

1. At **Enter Price Range, if desired:** at **Min**, enter the lowest price in the range.

2. At **Max**, enter the highest price in the range.

### ***To Set a Ranking Method***

- At **Rank By**, choose how you want to rank results:
  - **# Units:** Rank offices by transaction quantity.
  - **\$ Volume:** Rank offices by transaction dollar volume.

### ***To Group Results***

- At **Group By**, choose how you want to group results:
  - **Office:** Rank offices only.
  - **Firm:** Rank firms and offices, grouping offices within each firm. In the Rank column, firm rankings display on the left, office rankings display on the right.

### ***To Set a Sort Order***

The “Sort the Analysis By” field affects the report’s initial sort order. You can re-sort by any field once you generate the report. Your choice at this field does not affect the rank assigned each office.

- At **Sort the Analysis By**, choose how you want to sort results:
  - **Highest to Lowest:** Firms and/or offices display from high (1) to low ( $n$ ) ranking.
  - **Alphabetical:** Firms and/or offices display in alphabetical order, regardless of rank.

## Saved Market Share Criteria

Stratus MLS allows you to save Market Share search criteria so that you can run the report whenever you want. Use the saved criteria, in its original form or modified, for subsequent searches.

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### How . . .

#### *To Save Search Criteria*

1. After entering criteria, go to the **Save Criteria As** text box.
2. Enter a name for the Market Share analysis.
3. Click **Save**.
4. Stratus prompts, “Criteria Saved”. Click **OK**.

#### *To Use Saved Criteria*

1. At **Use Saved Criteria** select the name of the saved search criteria from the drop-down list.
2. Click **Use**.
3. The form fills with the saved criteria. Verify the accuracy of the criteria for the new search. Use the criteria as presented or modify it.
4. Click **Submit**.

#### *To Delete Saved Criteria*

1. At **Use Saved Criteria** select the name of the saved market share criteria from the drop-down list.
2. Click **Delete**.
3. Stratus prompts, “Are you sure you want to delete ‘saved criteria name’?”. Click **OK** to delete the saved criteria, or **Cancel** to retain the saved criteria.
4. Stratus prompts, “Criteria Deleted”. Click **OK**.

#### *To Modify Saved Criteria*

If you modify saved criteria, you can save the modified criteria as a new and unique search, keeping the original search intact. Alternatively, you can replace the original saved search with the modified one.

1. At **Use Saved Criteria**, select a Market Share search from the dropdown list.

*To save the modified criteria as a unique search, enter a different name at the **Save Criteria As** text box.*

*To replace the original search with the modified version leave the original search's name in the **Save Criteria As** text box.*

2. Click **Save**.
3. At the confirmation prompt, click **OK**.
4. Stratus prompts, "Criteria Saved". Click **OK**.

## Work With the Market Share Report

The Market Share report *ranks* all offices with listing transactions that match your submitted Market Share search criteria. However, the report *displays* only those offices you selected in criteria (Top, All, Yours, or specific selections).

Clues to interpreting the report are offered in its text. Headings and report summaries include the following information:

- The date the report was run (just under the office name and phone number);
- The type of listing inventory and transaction side are stated in the heading; for example, “Market Share for Available Inventory By Listing Broker”, or “Market Share for Listings Closed by Selling Office”.
- The number of offices included, the class(es) of listings included, the date range if any, and the geographic location (stated in summary lines, at the bottom left).

Full color charts and graphs provide visual clarification.

---

### How . . .

#### *To Understand Rankings*

The lower the assigned rank’s *number*, the “higher” the *ranking*. The office ranked “1” in a report has either the largest number of transaction units, or the largest dollar volume, depending on which field you ranked by.

If two or more offices (or firms) share the same rank number, this indicates that they hold equal market share for this particular search criteria. If two offices share rank 5, the next rank displayed is 7; no office is assigned rank 6.

If you grouped offices by firm, the report’s Rank column displays the firm rank, on the left, and within the firm the office rank, on the right. When you sort such a grouping “Highest to Lowest”, Stratus lists the firms in consecutive rank order from 1 to *n*.

#### *To Understand Totals*

“Totals Shown” provides each column’s total for displayed offices only.

“Totals Entire Report” provides each column’s total for *all* offices that match your search criteria. The report indicates the number of offices represented by these totals at the bottom left, at “Report represents \_\_\_ Offices”.

### ***To Change the Sort Order***

Changing the sort order does not affect the office rankings, it only affects the sequence in which offices appear. You can re-sort the offices by any column heading. (Original sort order is determined on the criteria page: see “Set Up Market Share Criteria” on page 273.)

- Click once on a column heading to sort from low to high. Click again to sort from high to low.

### ***To Start a New Market Share***

- While displaying a generated Market Share report, click **New Search** in the upper right corner.

### ***To Print the Report***

1. Click **Print** on the action bar while viewing the generated report.
2. The report may print immediately, or a browser dialog box may display. Choose **landscape** mode.

### ***To Print Charts Only***

1. Click **Print charts only** while viewing the generated report.
2. The charts may print immediately, or a browser dialog box may display.

### ***To View an Office’s Listings***

1. To view listings for any office displayed in a generated report (that is, those listings matching Market Share search criteria), click on the underlined office name.
2. Listings display in List format. Click **Return to Market Share** to re-display the report page.

### ***To Download the Market Share Report***

You can download data for listings represented in the report. The system downloads in .csv (comma separated value) file format, compatible with database programs such as Top Producer, Microsoft Access, and Microsoft Excel.

1. Click **Download**.
2. At **Include Field Names as first record of Download file?**, clear the check box if you do not want to include field names for use in column headings, then click **Download**.
3. Follow browser prompts.

4. When prompted to open or save the file, select **Save**, and choose a folder in which to store the downloaded file.

**Caution:**

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- The download file may be very large. While your report may display only the top 5 offices in Suffolk County, for example, the total listings considered for analysis is represented by the “Totals Entire Report” figure for the “#Units” column. This number may represent thousands of listings.
- The following fields are downloaded for each listing: ML#, Address, Town, Zip, Zone, County, Listing Date, Contract Date, Title Date, Days on Market, Last Status Change, Original Price, Listing Price, Sold Price, Listing Broker Code, Listing Broker Branch, Listing Agent, Selling Broker Code, Selling Broker Branch, Selling Broker Commission, Buyer Broker Commission, and Class.



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