Flex
Broker Training Manual

California Regional Multiple Listing Service, Inc.

CRMLS.ORG | 800.925.1525

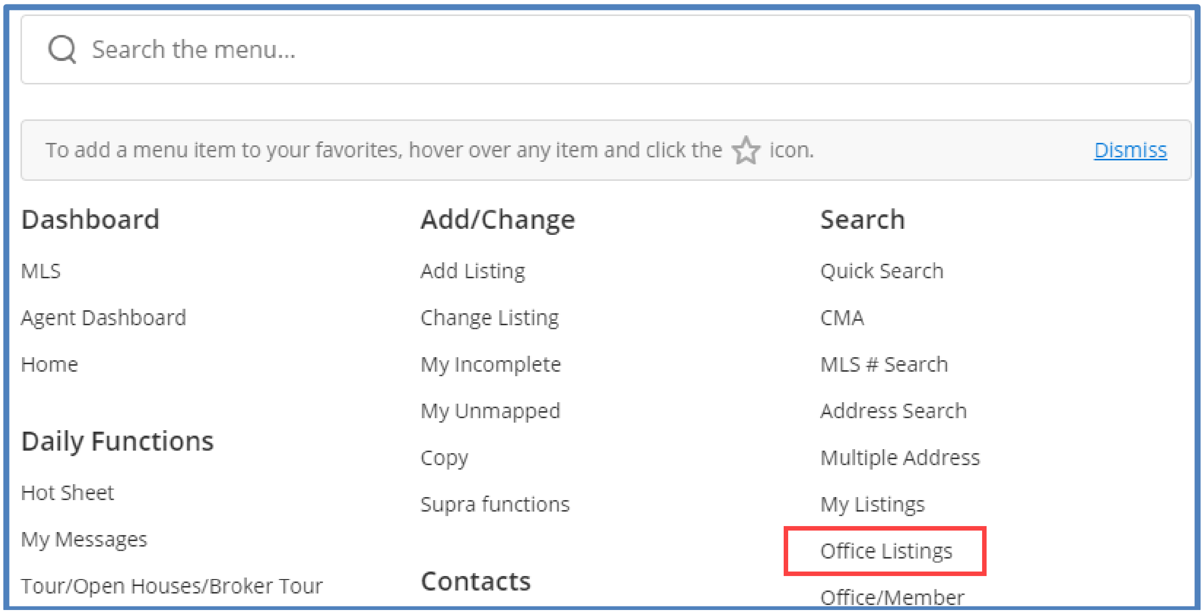
Effective October 20, 2020

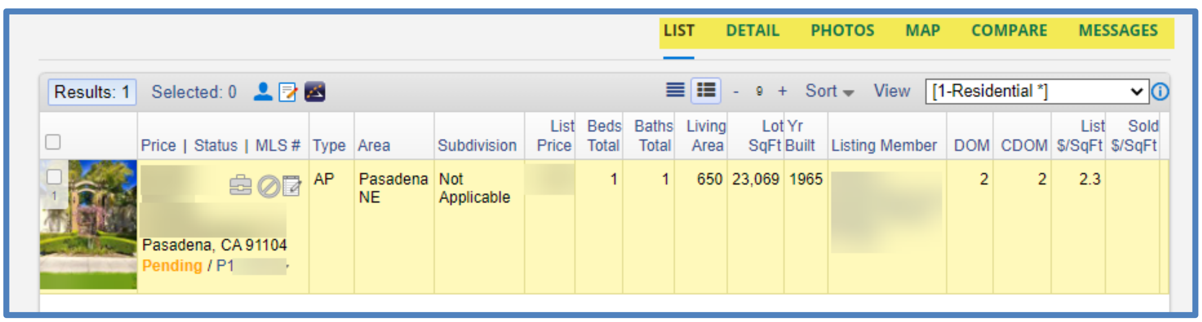
Contents

My Active Office Listings

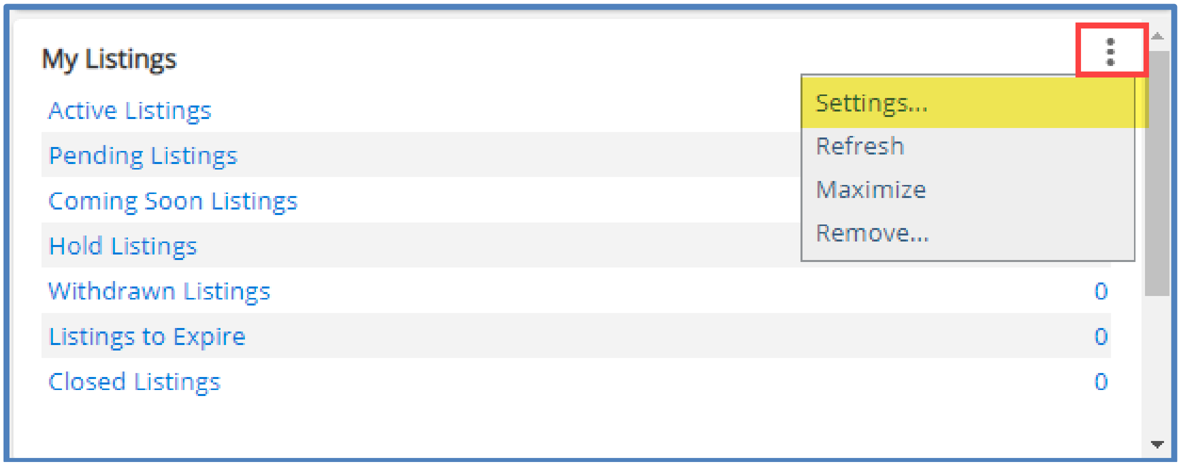
Brokers may view their active office listings for their **primary office** in two ways:

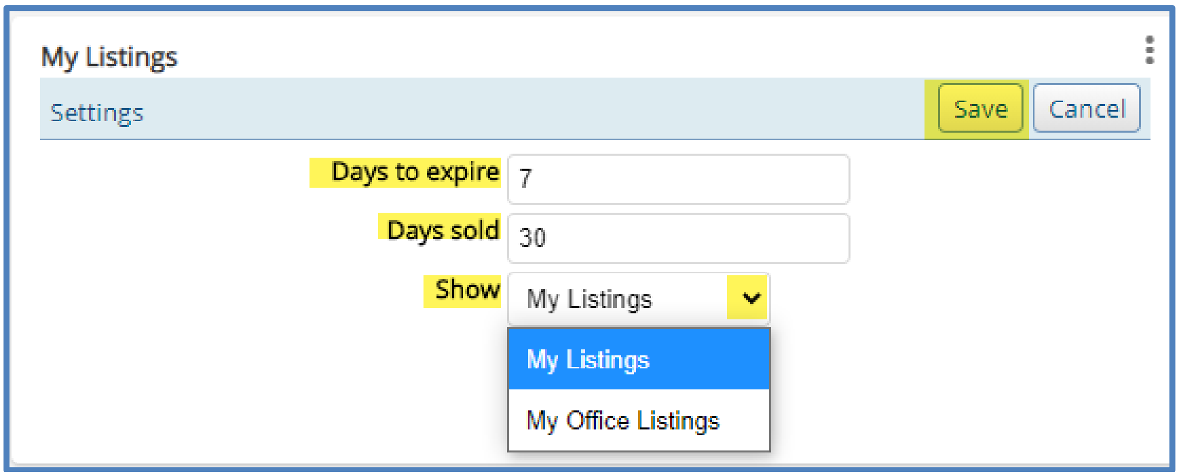
1. From **Menu, under Search,** click the **Office Listings** link to view your active office listings**.** *Tip: Mark the Office Listings as a favorite to save it to your favorites bar.*





2. From the home page, hover your mouse over the **My Listings** gadget. The default displays your listings; however, you can customize it to display Office or Company (all offices within the company) listings. Click on the three dots in the upper right corner, click on Settings, and then select the appropriate options and click Save to apply the changes.





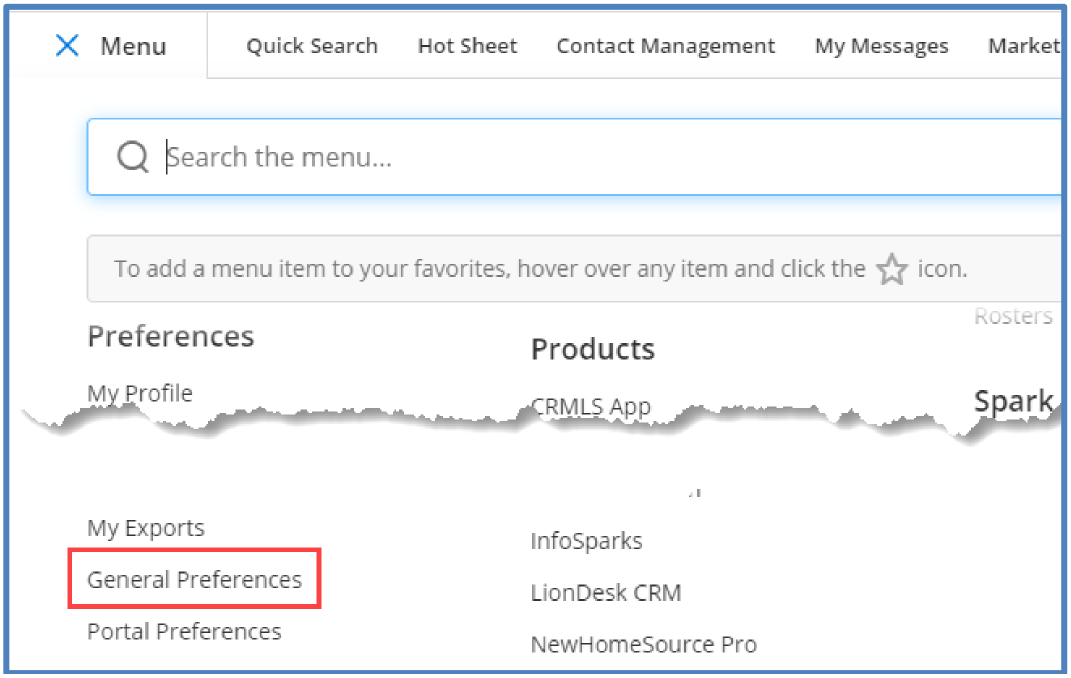
General Preferences

There are several General Preferences that you as the broker can take advantage of:

My Listings: This determines which statuses display when clicking on the Office/Company Listing link in your favorites.

Off Market listings (Hold, Withdrawn, Closed): Older than X number of days will not appear on the My Listings screen – this setting applies to the Office/Company Listings link in your favorites.

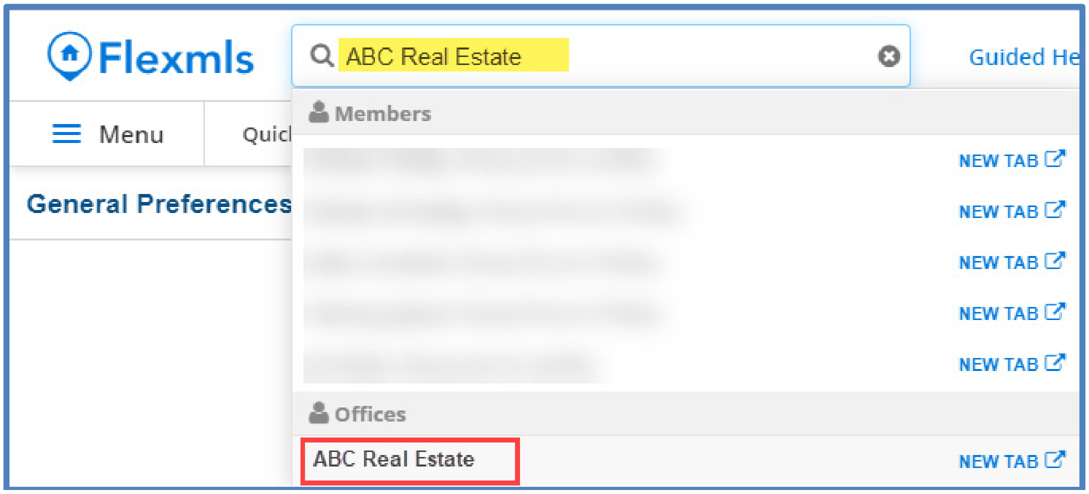
Expiring Listing Notifications: This setting follows broker load, so the system can notify office level users of listings about to expire within the next X number of days.


Menu
Quick Search
Hot Sheet
Contact Management
My Messages
Market
Search the menu...
To add a menu item to your favorites, hover over any item and click the icon.
Rosters
Preferences
My Profile
Products
CRMLS App
Spark
My Exports
General Preferences
Portal Preferences
InfoSparks
LionDesk CRM
NewHomeSource Pro


flexmls Dashboard: Listings to Expire / Sold Listings Range
Show listings that will expire in 7 days under Listings to Expire.
Show listings that were sold in the past 30 days under Sold Listings.
My Listings: Which statuses should be included?
Active
Active Under Contract
Coming Soon
Pending
Closed
Expired
Hold
Withdrawn
Cancelled
Off-Market listings older than this many days will not appear on the My Listings screen:
Days: 30
Expiring Listing Notification
Send email notification of expiring listings once per day for 7 days before the expiration date.

Finding Your Office Code (Short ID)

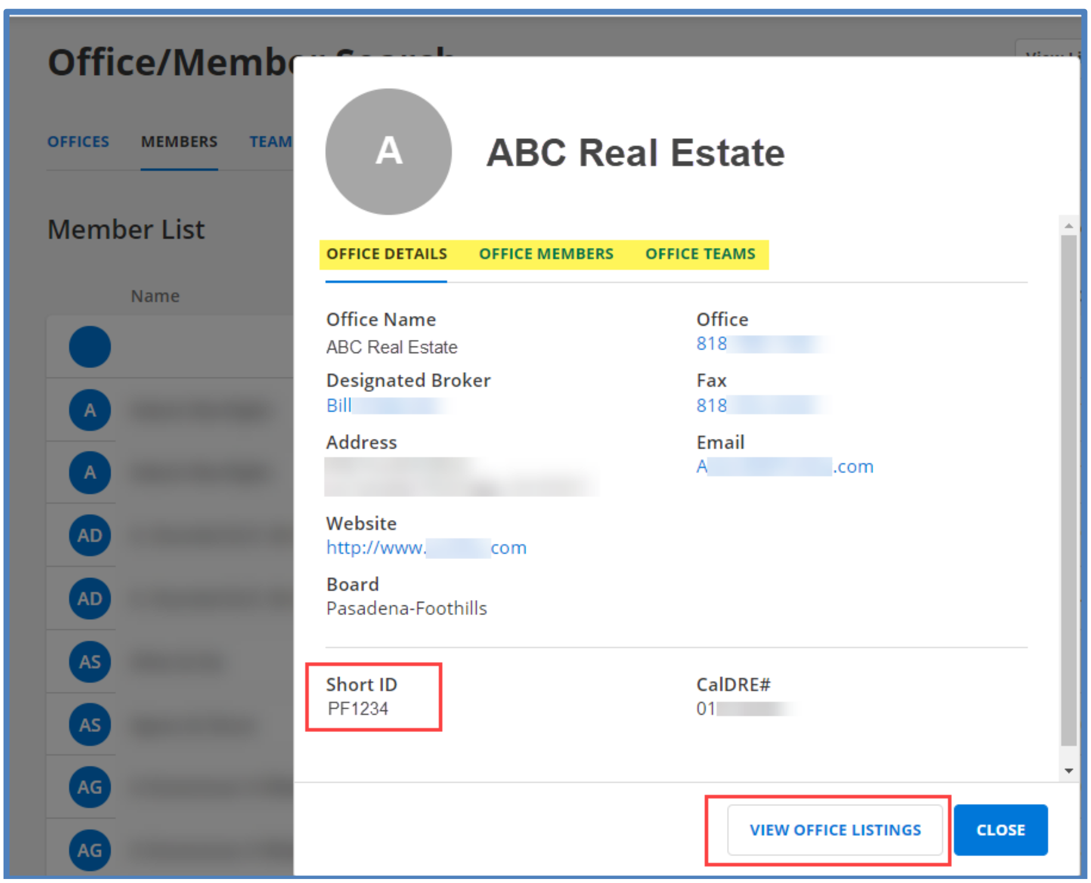
1. Type your office name in the **Search** bar.



2. From the drop-down menu, click on the office name to view office details.

3. Write down or copy the **Short ID** (Office Code) for your office.
   - You can also view Office Members or Office Teams.

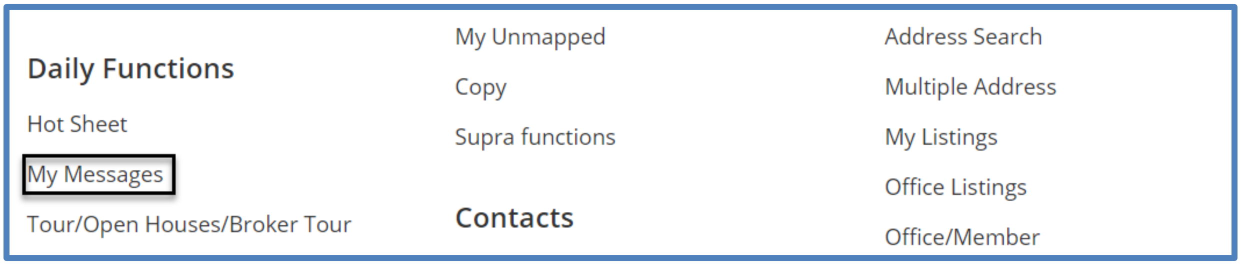
4. You can also view your office listings by clicking on **View Office Listings.**



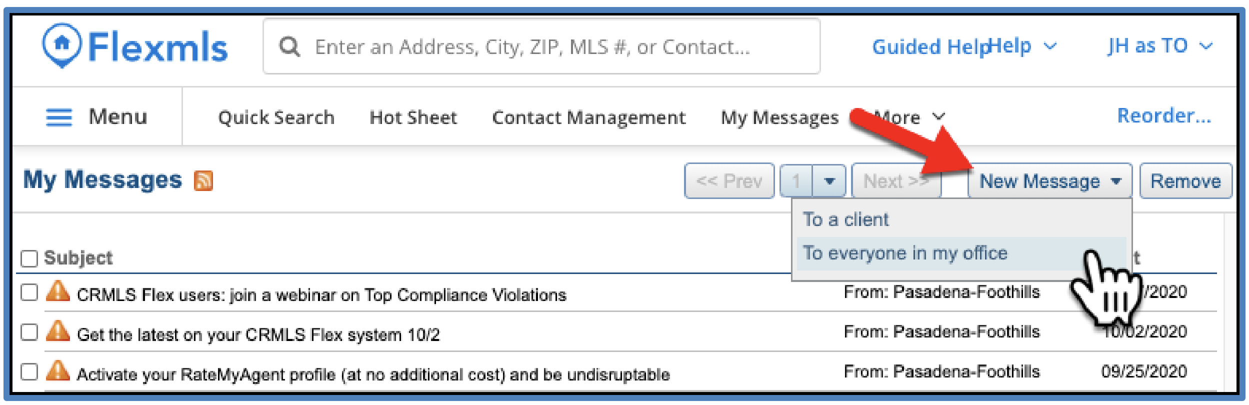
My Messages - Send to Everyone in My Office

Office/Company level broker load can email/create login popups for members within their office.

1. From **Menu**, under **Daily Functions**, click on **My Messages**.



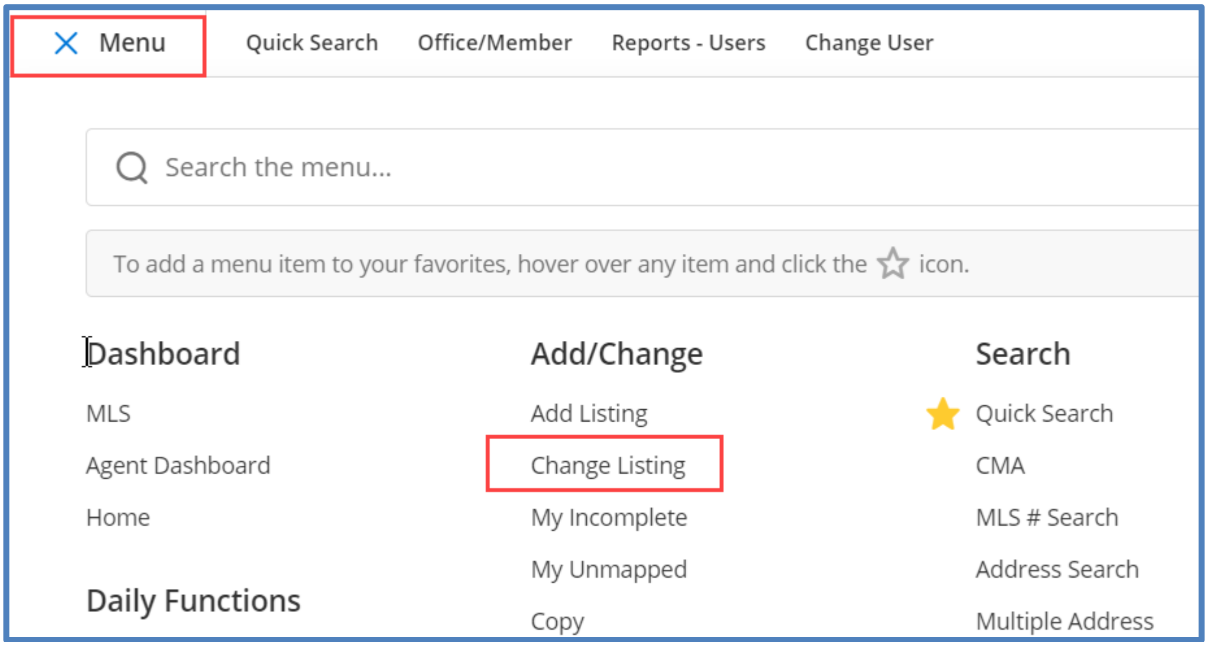
2. Select **New Message** and choose the send 'To everyone in my office' option. You can display the message as a popup when office members login to Flexmls, and also have it sent out as an email notification to office members.



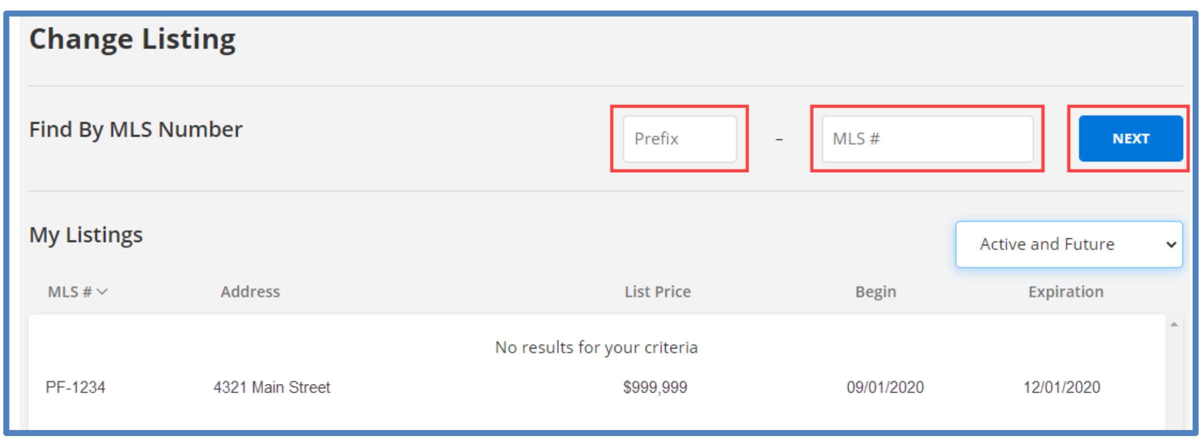
Modifying Your Office Listings

Update Listings

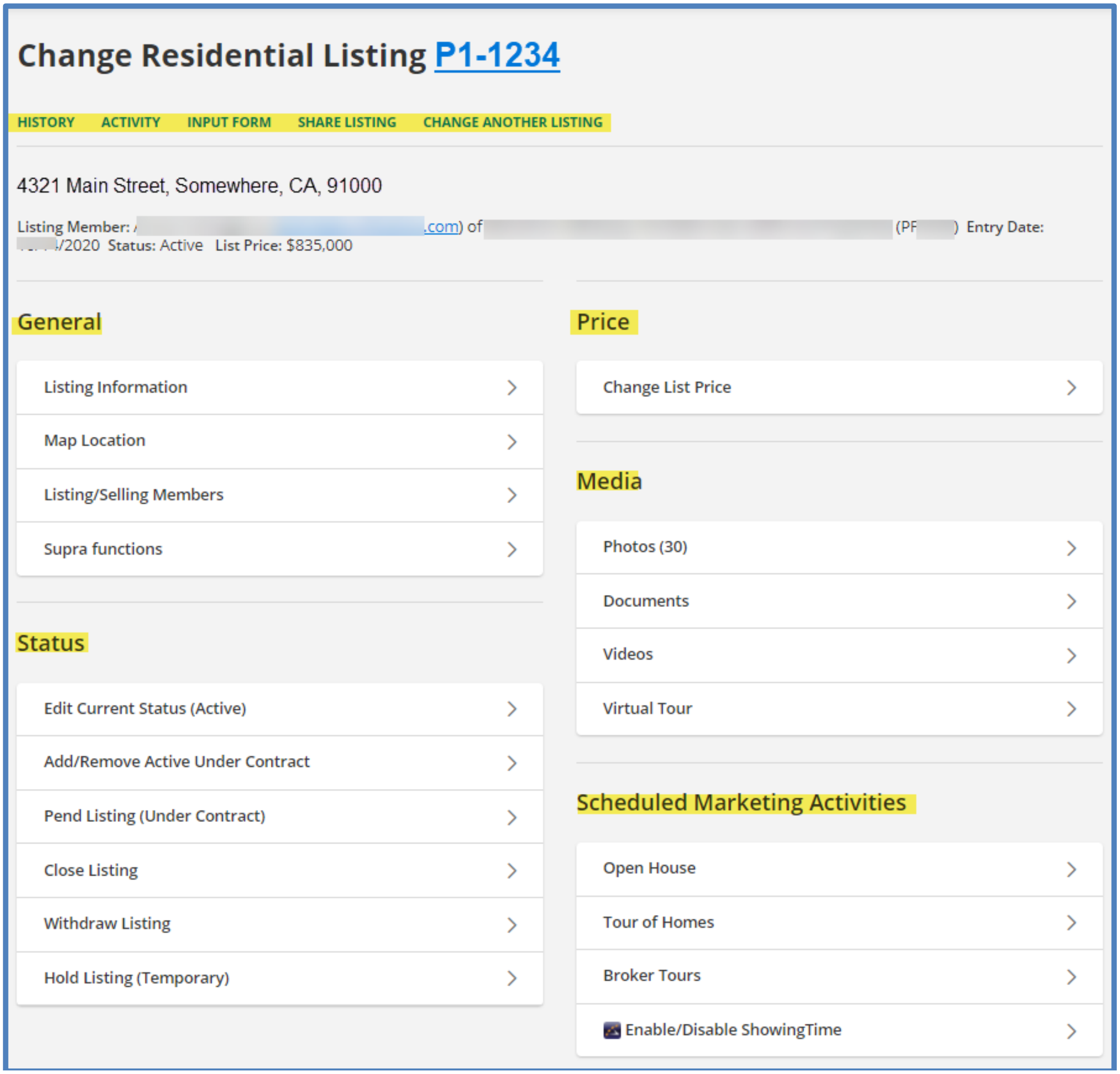
1. To change or modify a listing, click on **Menu**, then under **Add/Change**, click **Change Listing.**



2. Enter the MLS number in the box and click **Next**.

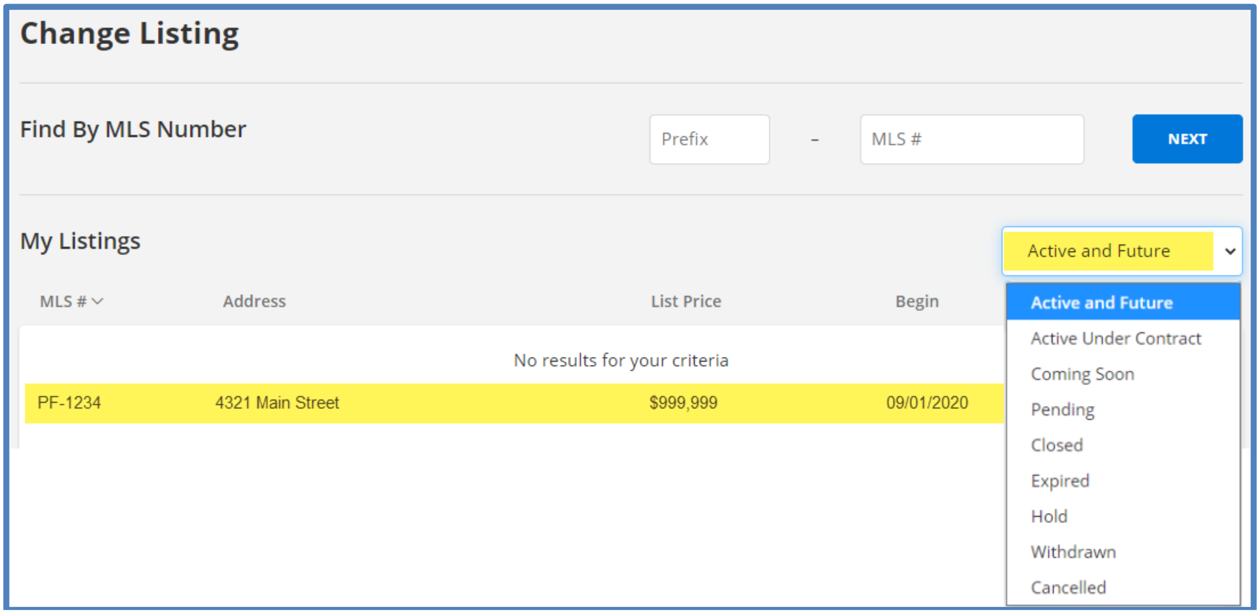


3. You can change information in the General section, along with Status, Price, and Media; you may also update Marketing Activities. Along the top of the page are quick links to view the listing's history or activity, print an input form, change another listing, and report listing errors (if applicable). When finished, save your changes.

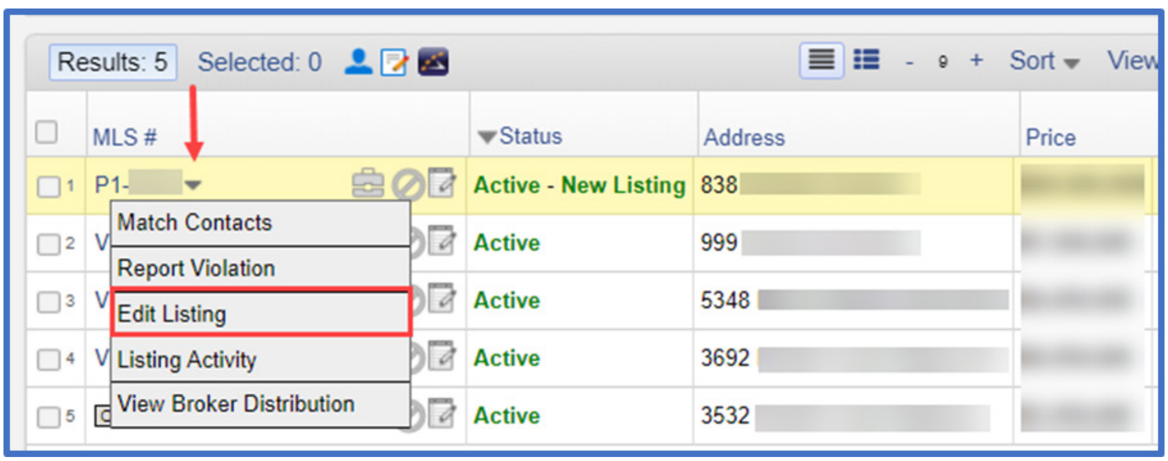


Note: If you are logged in as an office or company (not as a member), Flexmls will include all listings for the office or company in the My Listing Panel.

You can select the listing by clicking on the MLS #. You have the option to organize the listings. Click the down-arrow to change statuses.



You can also change a listing from the search results by clicking the drop-down arrow next to the MLS # and selecting **Edit Listing**.



Note: As of August 31st, 2020, your Flex system was upgraded, and your listing prefix numbers changed.

For Pasadena Foothill Association members, your prefix numbers are:

P0 = Existing listings transferred to the upgraded system. (P0-820123456)

P1 = New listings entered on 8/31/20 or after. (P1-1000)

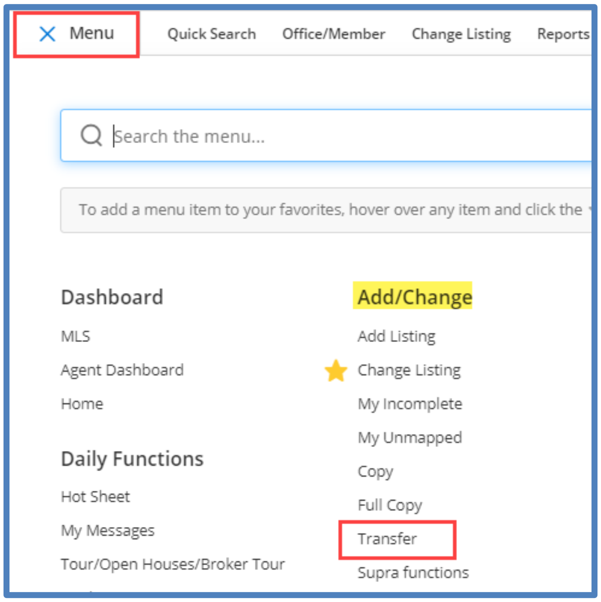
For Ventura Association members, your prefix numbers are:

V0 = Existing listings transferred to the upgraded system. (V0-220123456)

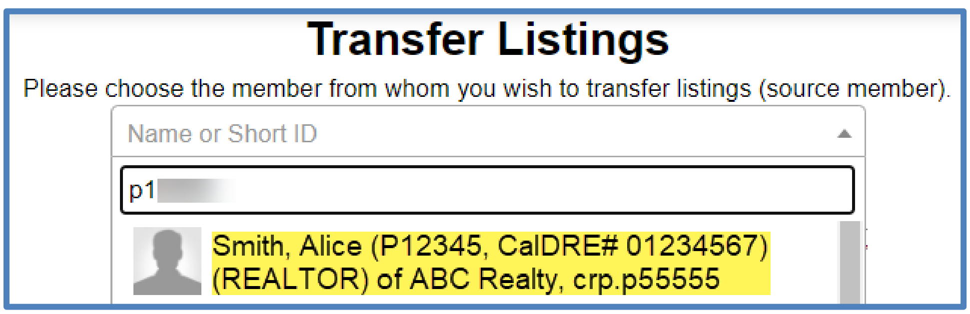
V1 = New listings entered on 8/31/20 or after. (V1-1000)

Transferring a Listing to Another Agent

1. From the **Menu, under Add/Change**, click **Transfer**.

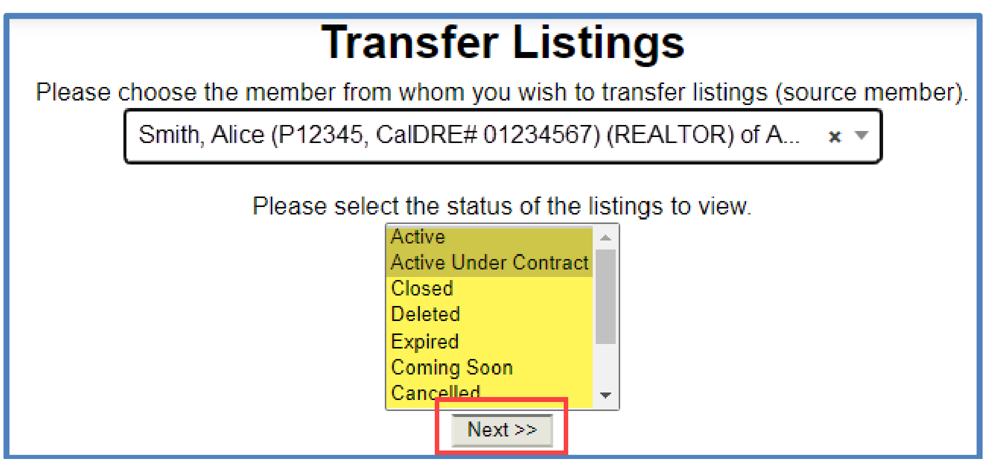


2. Enter the listing agent's name or short ID from whom you want to transfer listings, then select the member from the list.

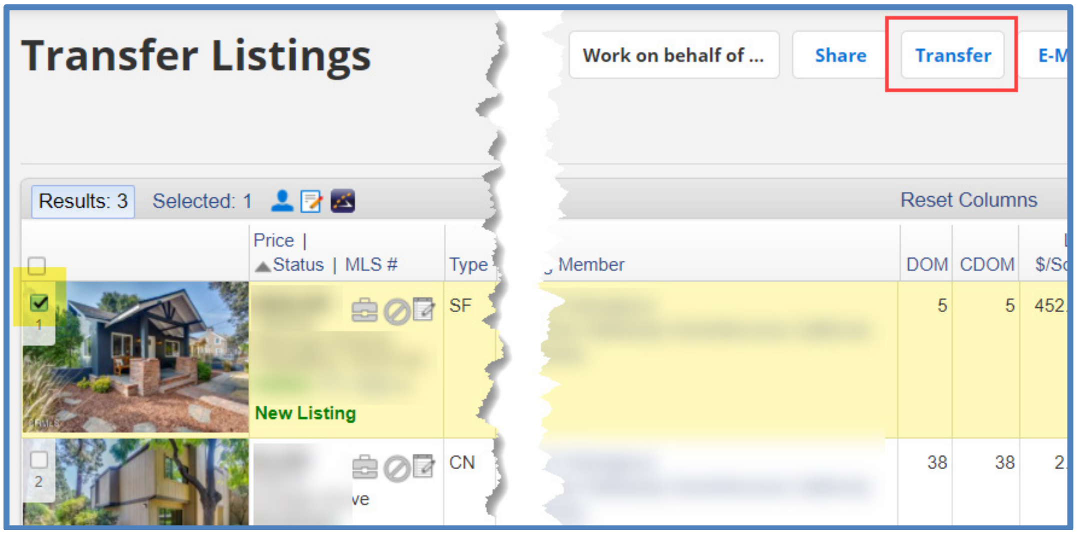


3. Click on the statuses of the listings you want to view. To select multiple statuses, hold down the Control or Command key while clicking on statuses.

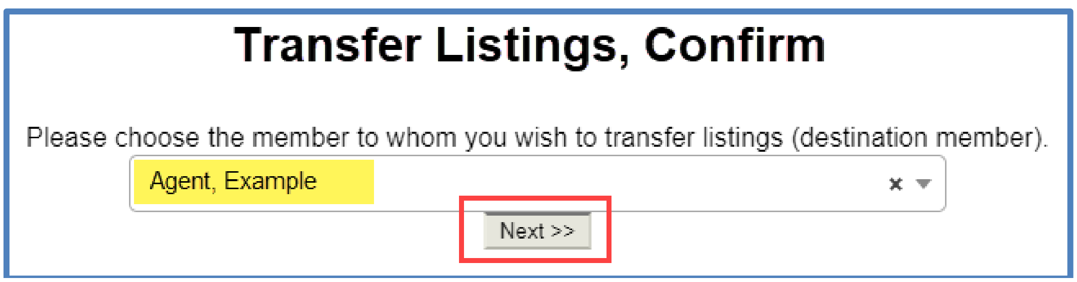
4. Click Next to open a search results page with the matching listings for the selected member.



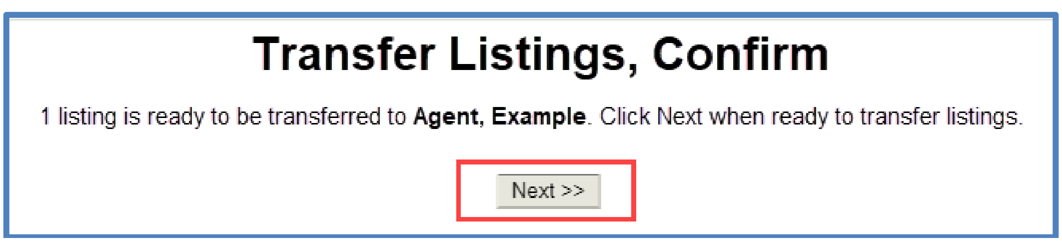
5. **Select the listing(s)** you want to transfer and click the **Transfer** button at the top of the page.



6. Choose the name of the member to whom you want to transfer the listings and click Next.



7. Click Next again to complete the transfer.



Broker Distribution

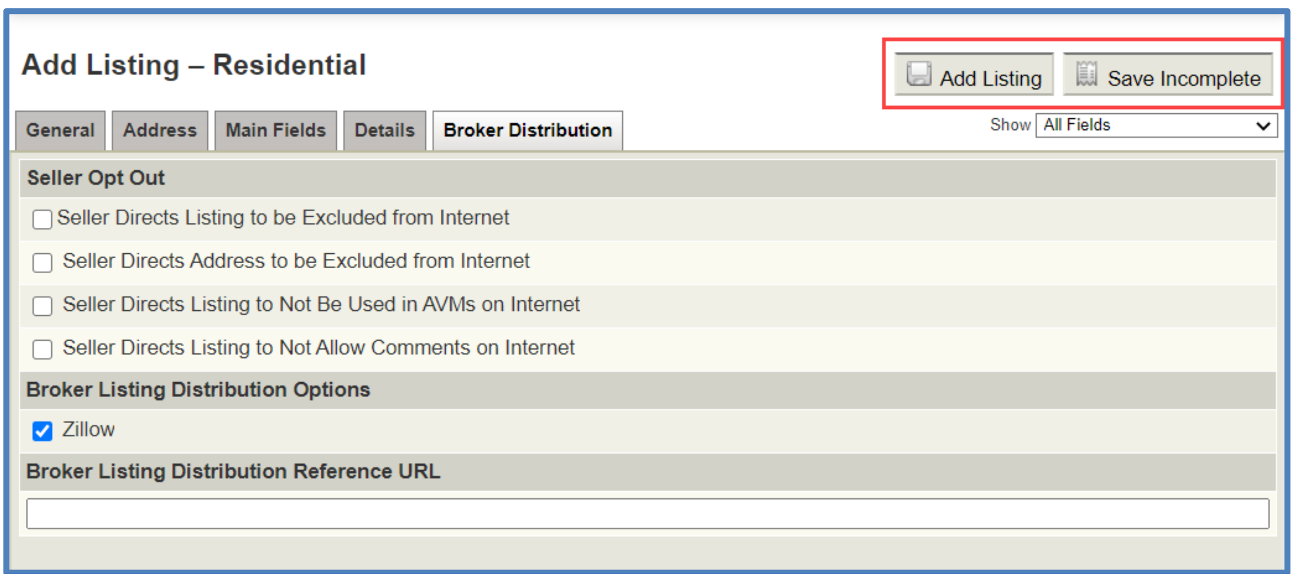
This page displays listing distribution options when saving a listing. Select distribution options by checking the corresponding boxes. Distribution options may vary by brokerage.

If the seller requests that the listing be excluded from the internet, select Seller Directs Listing to be Excluded from Internet. The seller can also request that the address of the listing be excluded from the internet. These selections govern all internet sites, including Realtor.com and IDX sites. The system will prevent you from making contradictory choices in the other checkboxes on the page.

The setting Seller Directs Listing to Not Be Used in AVMs on Internet refers to automated valuation models on virtual office websites (VOWs). The option Seller Directs Listing to Not Allow Comments on Internet also refers to VOWs only. For more information about VOWs, refer to the nar.realtor website.

If you are done entering information, submit the listing by clicking **Add Listing** at the top of the page. If you have entered all required fields, the system will assign you an MLS number and display a confirmation page.

Select **Save Incomplete**, to complete later.



Teams

The Teams function allows an agent to work with other agents, or assistants, and gives their Team full control over their account in Flex. A Team consists of a Team Lead and one or more Team Members. A Team Lead is the agent who is requesting Team Members; only one Team Lead is allowed per Team. A Team Member assumes all the Team Lead user class abilities. It is not recommended that a Team Lead be a Flex User Class DB, HB, OM, or HM. This control includes Contacts, Saved Searches, Add/Edit of Listings, Printing of Reports, Email, and Auto Email. Each member of the Team must reside within the same brokerage. This can cross association boundaries, but each association can only manage their own Team Lead. Team Members will only be able to access the Team Lead's account, no other Team Members' accounts.

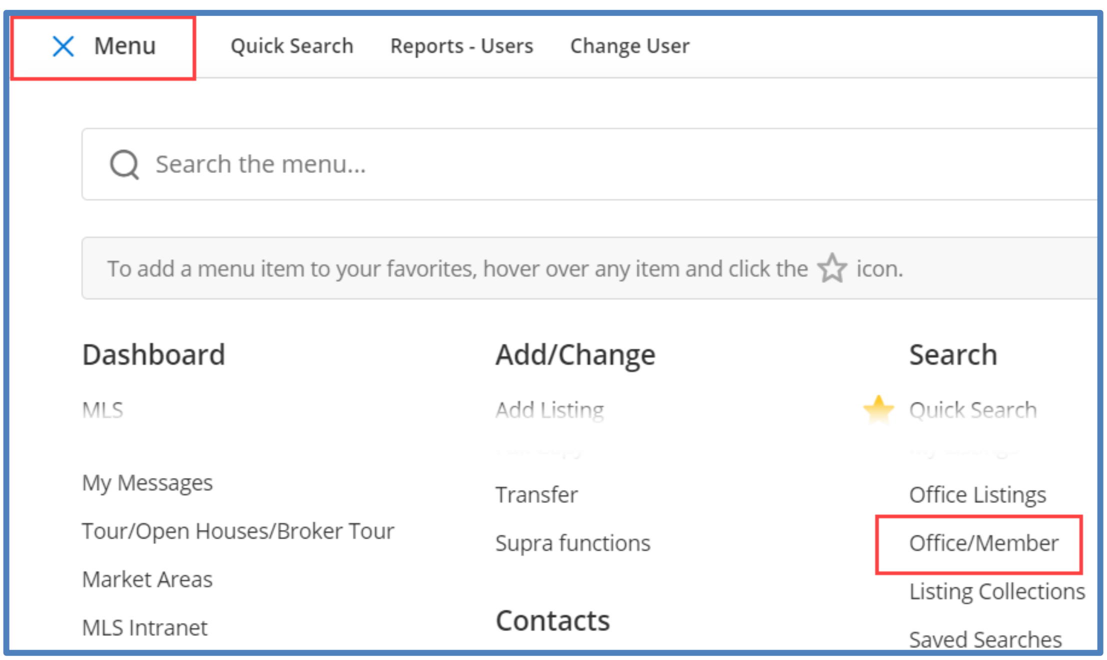
Team Members can be setup to "**Impersonate**" or "**Work on Behalf**" of the Team Lead. Both options will have full control over the Team Lead account. "Impersonate" is for licensed agents or assistants and "Work on Behalf" is for non-licensed assistants. "Impersonate" will show the Team Lead's name at the bottom of any page or email, whereas "Work on Behalf" will show the Team Member's name at the bottom.

As an option, you can assign a Team Name. If you are choosing to list as a team, the Team Name must contain the word "Associates," "Group," or "Team," **AND** the name of the team **MUST** contain the last name of the licensed Team Lead. For all Teams who choose to use the Team Name feature, there must be at least 2 licensees on the Team. For Teams that have filed a Fictitious Business Name, they may utilize only that filed name.

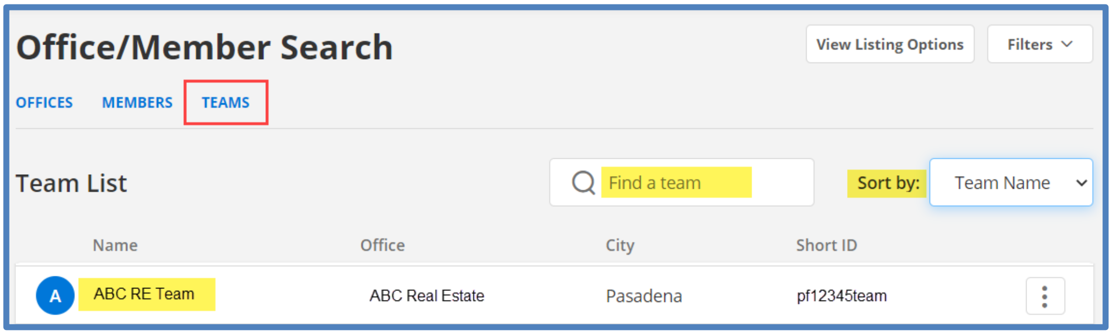
Searching for a Team

Follow these steps to search for an existing Team.

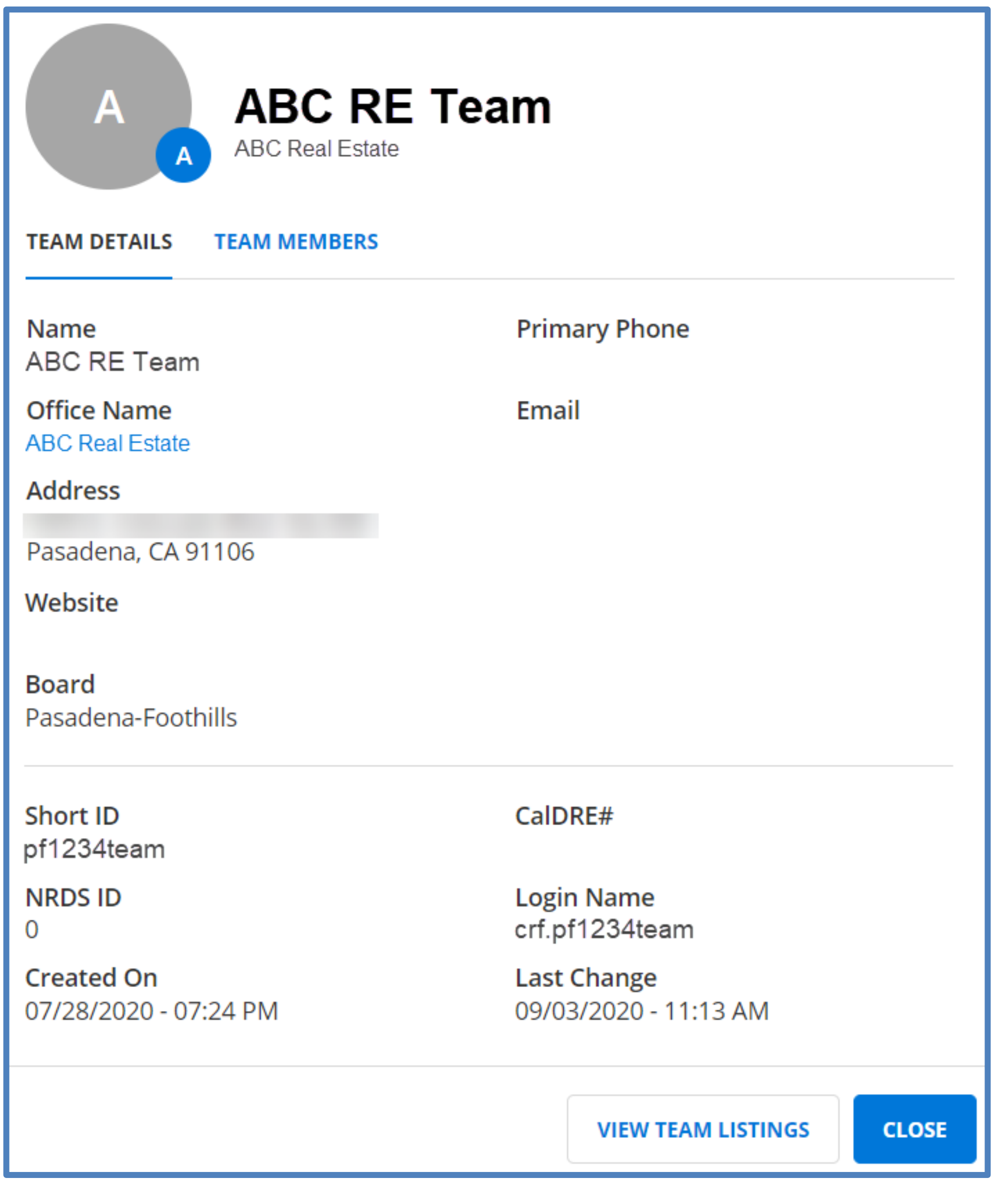
From **Menu, under Search, c**lick on **Office/Member.**



1. Select the **Teams** tab. Enter the team name or select it from the list. Sort by Team Name or city. **Click the team name** to display the team information.



2. The team information window will display the Team Details and Team Members, as well as the Team Listings.

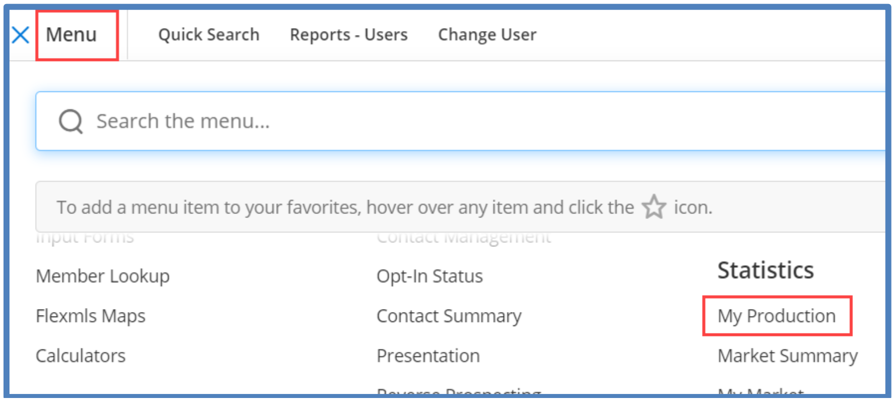


Statistics

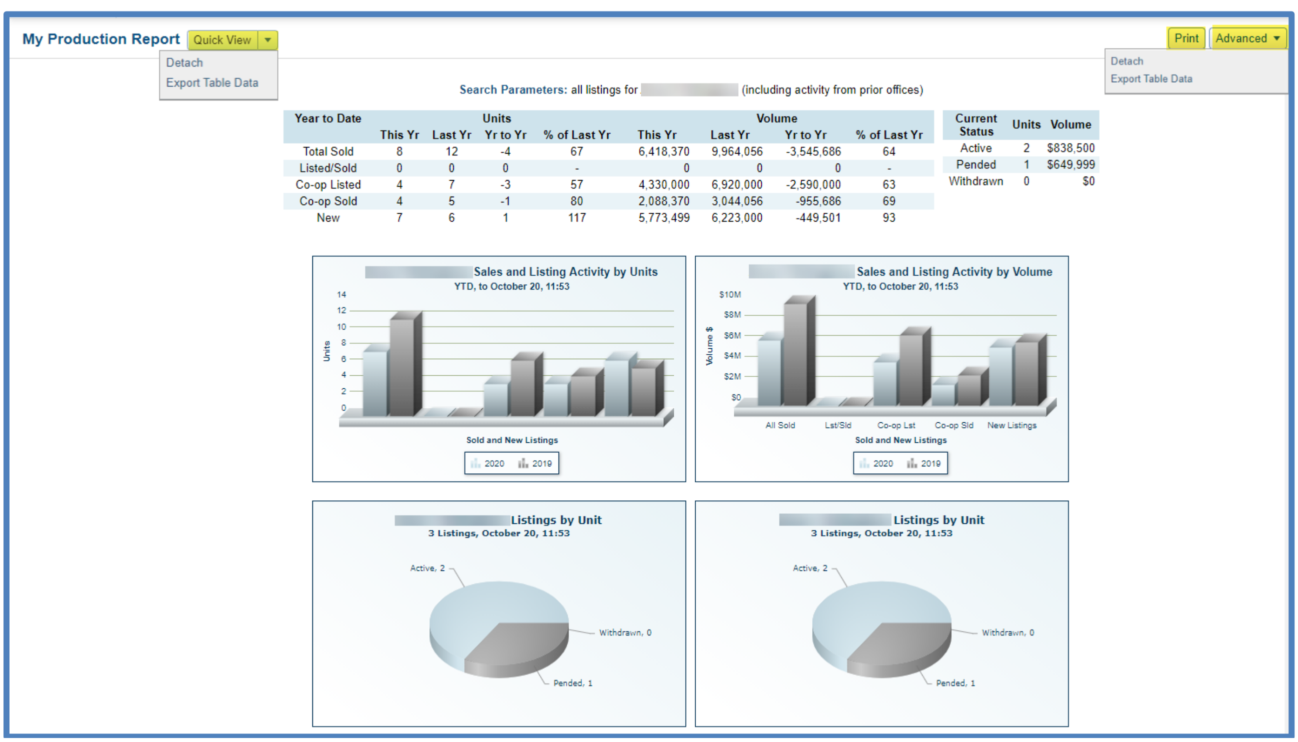
Statistics allow you to analyze market trends and activity in your market area. Follow the steps in these sections to generate tabular stats and statistical charts and graphs.

My Production Report

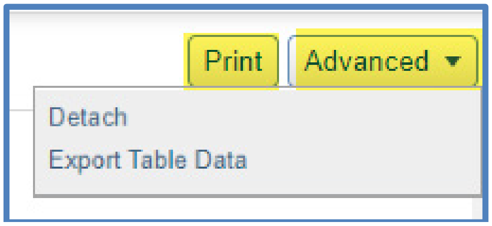
1. From Menu, under Statistics, select **My Production.**



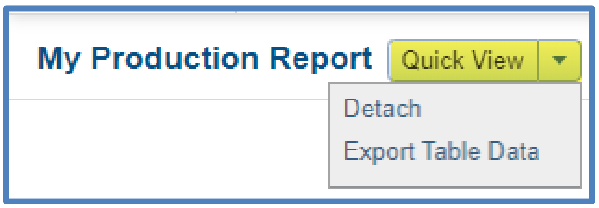
2. Click on the drop-down menu and select either Quick View or Member YTD Report. The **Quick View** shows year-to-date statistics compared to statistics from the previous year for the currently logged in user. The information is displayed both numerically and graphically. The **Member YTD Report** shows your year-to-date production for active, new, sold, pending, withdrawn, canceled, and expired listings. Use these tables to view your production compared to the production of your office and your MLS.



3. Print these statics using the **Print** button at the top right of your screen.



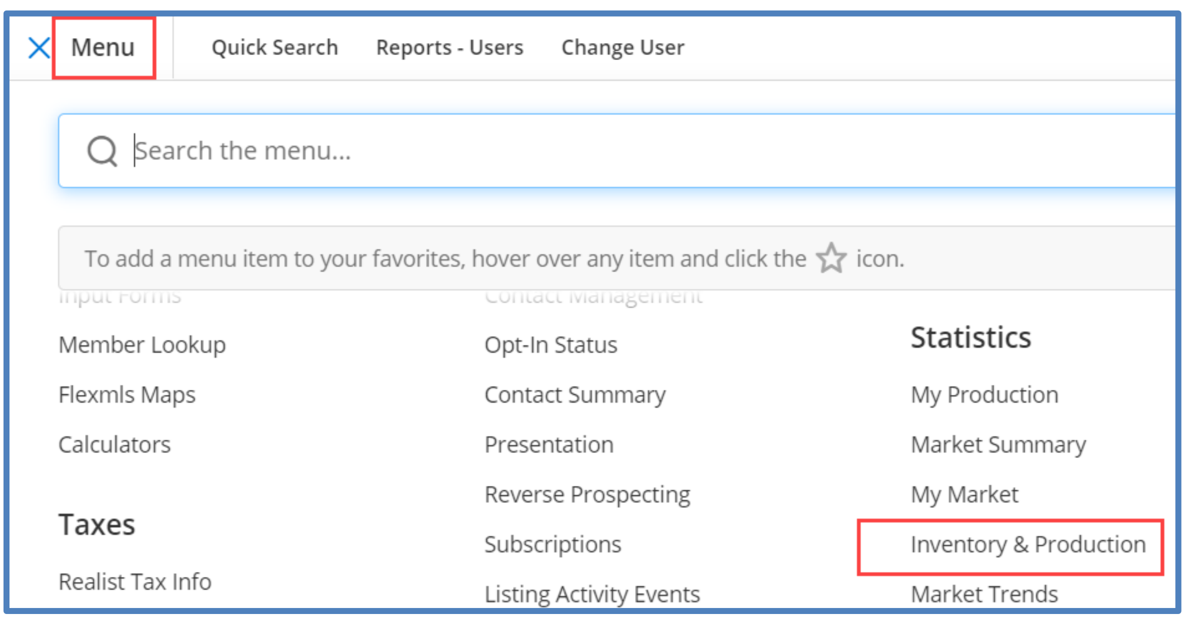
4. Click on the Advanced drop-down if you would like to **Detach** to open the report in a separate window or click on **Export Table Data** to export the data from the page to a .csv file.



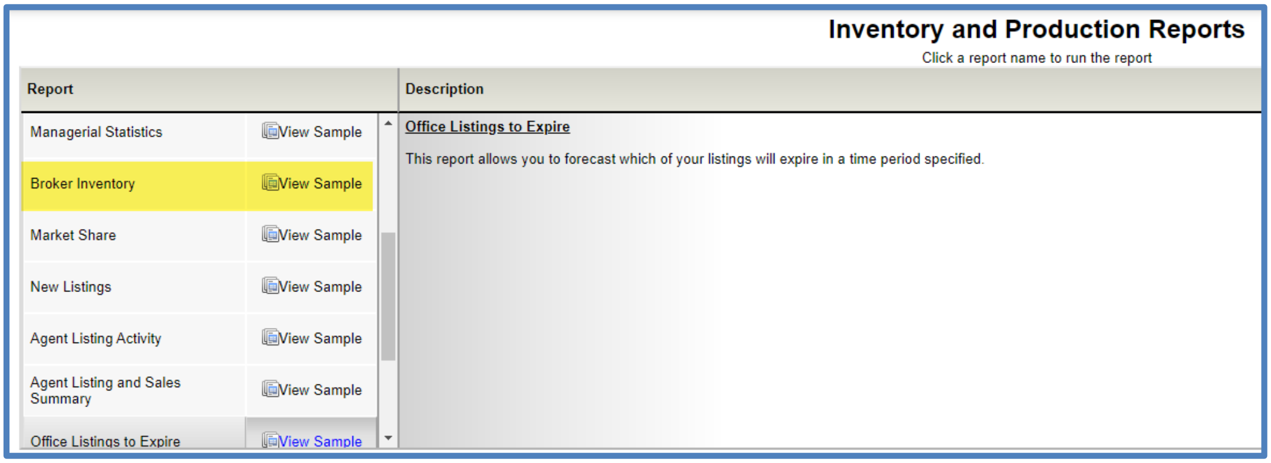
Broker Inventory Report

The Broker Inventory Report shows a snapshot of member and office listing activity during a selected time period.

To run the report; go to the **Menu;** under **Statistics**, click on **Inventory & Productions.**



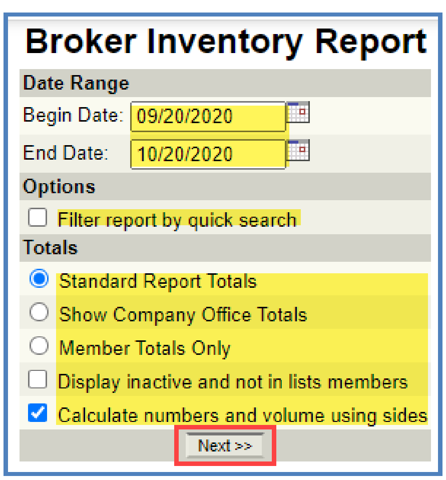
1. Scroll down and click on **Broker Inventory**.



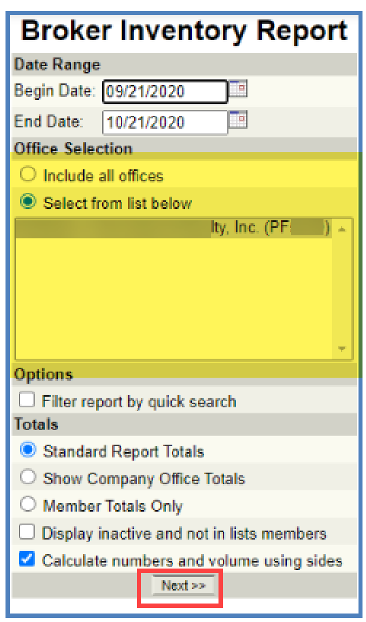
2. Enter a date range for the report. Select offices (if applicable).
3. You can also filter the report using a Quick Search.
4. Select one of the following report types:

- Standard Report Totals – Displays totals by office and then member.
- Show Company Totals – Displays totals by company and then by office.
- Member Totals Only – Does not show totals for the office or MLS.
- Display inactive and not in lists members
- Calculate numbers and volume using sides
    - Each sold listing has two sides: a listing side and a selling side. The listing member and selling member are each credited with a side, or in the case of co-listing or co-selling members, half a side. The *Calculate numbers and volume using sides* option affects how the numbers for sales are totaled. When you select the option, sales where a member is both the listing and selling agent count as double volume. If you do not select this option, those sales are counted at their regular volume.

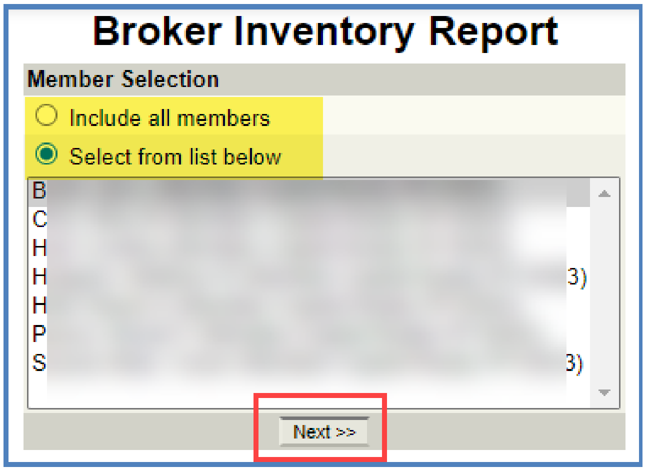
Select **Next.**



OR



5. Include all members or select from the list and click **Next** to generate the report.



6. Current Member Stats example.

Office: Realty, Inc. (PF)
Member: (P)

MLS Nbr	Address	City	State	Book Section	Area	Price	Beg Date	End Date	Status	Sold Date	Remarks
P1-	54	San Gabriel	CA	SF		1099000.00	10/7/2020	1/4/2021	A		Listed for 1,099,000
P1-	52	Pasadena	CA	CN		859500.00	10/12/2020	1/5/2021	A		Listed for 859,500
BB-	40	Los Angeles	CA	CN		519900.00	5/31/2020	12/31/2020	C	9/28/2020	Listed by
PF-	62	San Gabriel	CA	SF		1199000.00	9/21/2020	11/30/2020	C	10/15/2020	Listed by for 1,199,000 Sold for 1443000.0 or 1,199,000

Current Member Stats		
2	Current Active Listings With a Value of	1,958,500
0	Under Contract Listings With a Value of	0
0	Sides Listed and Closed by Self	0
0.00	Sides Listed and Closed by Own-Office Member	0
0.00	Sides Listed and Closed by Other Office	0
0.00	Sides Closed and Listed by Own-Office Member	0
2.00	Sides Closed and Listed by Other Office	1,961,100
0.00	Sides Co-Listed and Closed by Own-Office Member	0
0.00	Sides Co-Listed and Closed by Other Office	0
0.00	Sides Co-Closed and Listed by Own-Office Member	0
0.00	Sides Co-Closed and Listed by Other Office	0
2.00	Sides Total for Member	1,961,100
0	Total Off-Market, Not Sold, Value	0

7. Company Stats compared to MLS Board Stats.

8. The Percent Difference table shows the number and dollar value of listings in the report as a percentage of the number and dollar value of listings for the MLS.

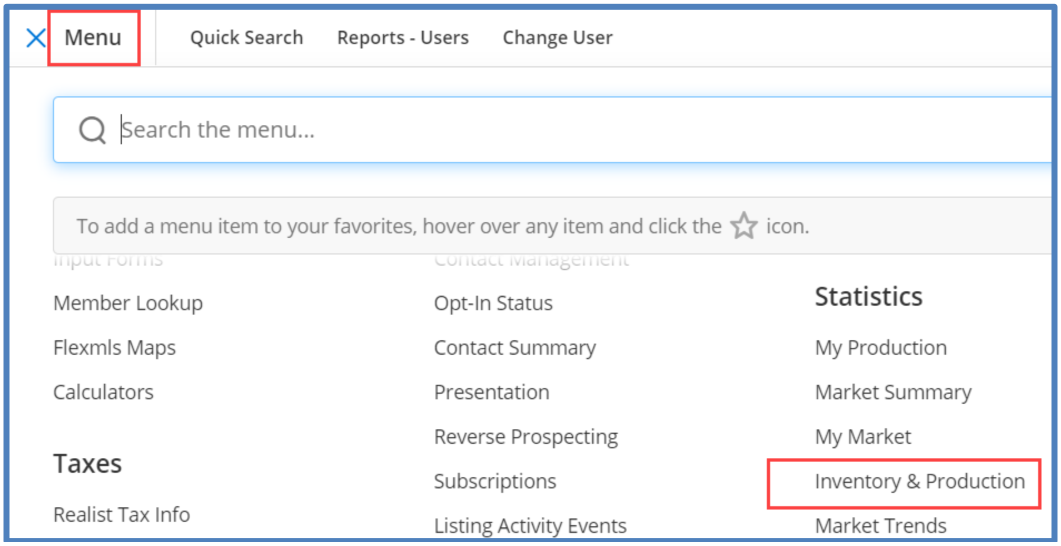
Company Stats			MLS Board Stats		
21	Current Active Listings With a Value of	60,108,300	41,542	Current Active Listings With a Value of	35,721,709,949
4	Under Contract Listings With a Value of	7,090,000	30,288	Under Contract Listings With a Value of	13,139,698,434
10	Sides Closed This Date Range- Own Office	4,044,800	9,220	Closed This Date Range- Own Office	4,729,860,438
17.50	Sides Closed This Date Range- Co-op	28,534,175	14,205	Closed This Date Range- Co-op	10,345,467,717
27.50	Sides Total Closed by Office	32,578,975	23,425	Total Closed by MLS	15,075,328,155
3	Total Off Market, Not Sold, Value	2,690,500	8,323	Total Off Market, Not Sold, Value	6,065,235,690

Percent Difference		
0.051	Current Active Listings With a Value of	0.168
0.013	Under Contract Listings With a Value of	0.054
0.108	Closed This Date Range- Own Office	0.086
0.123	Closed This Date Range- Co-op	0.276
0.117	Total Closed by Office	0.216
0.036	Total Off Market, Not Sold, Value	0.044

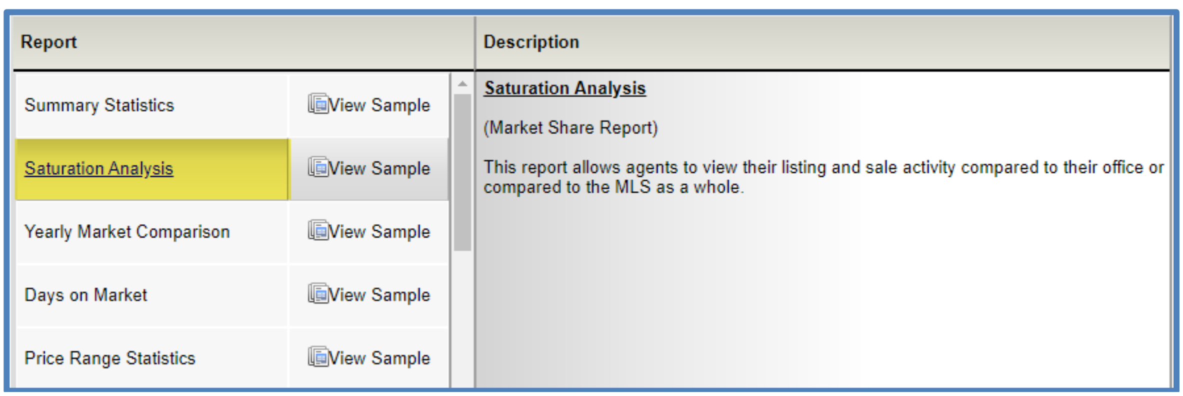
Market Saturation Report (Member/Office Ranking Report)

The **Saturation Report** allows members/offices to view their listing and sales activity compared to their office or to the MLS.

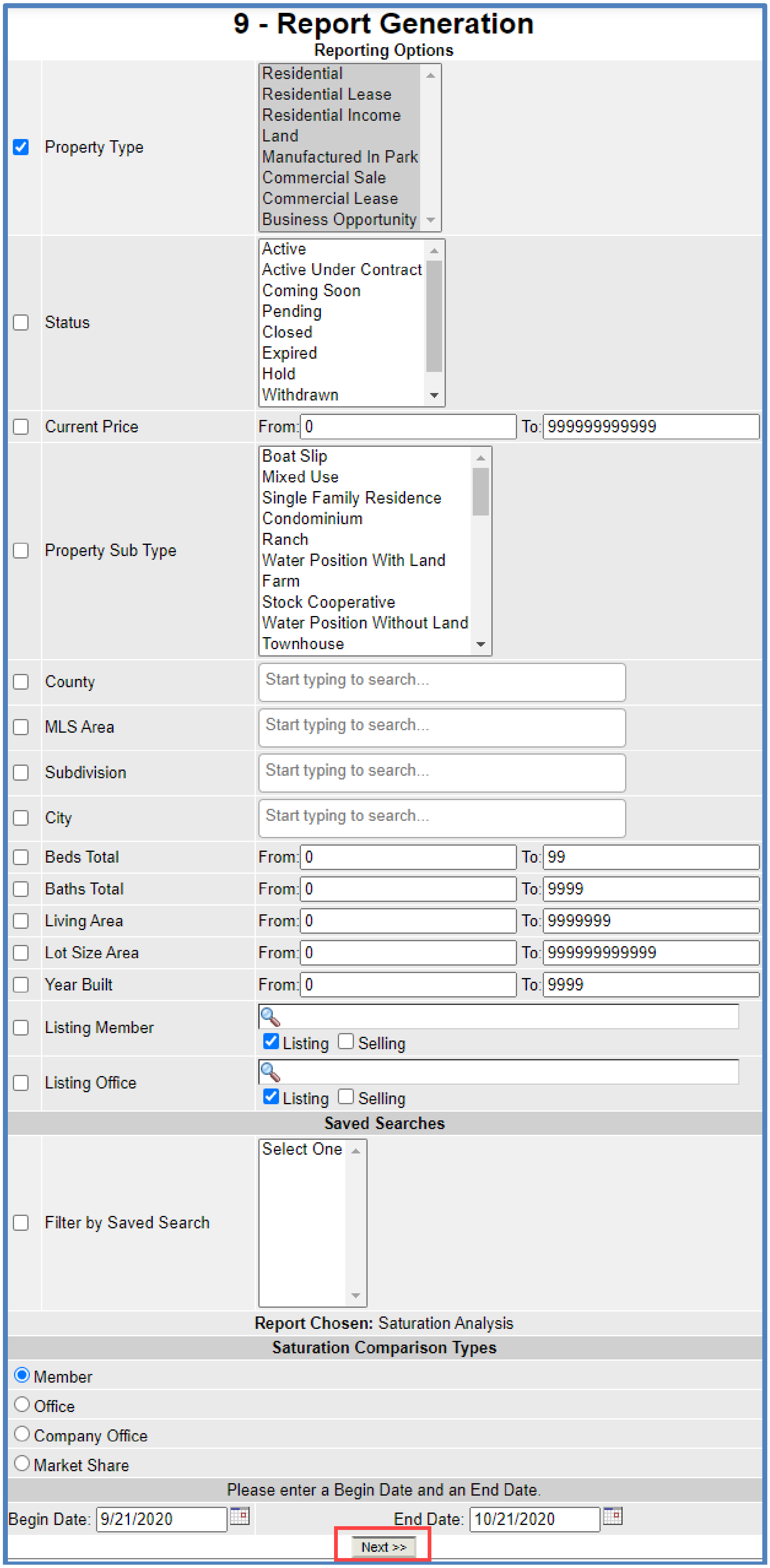
1. From **Menu,** under **Statistics**, click on **Inventory and Production**.



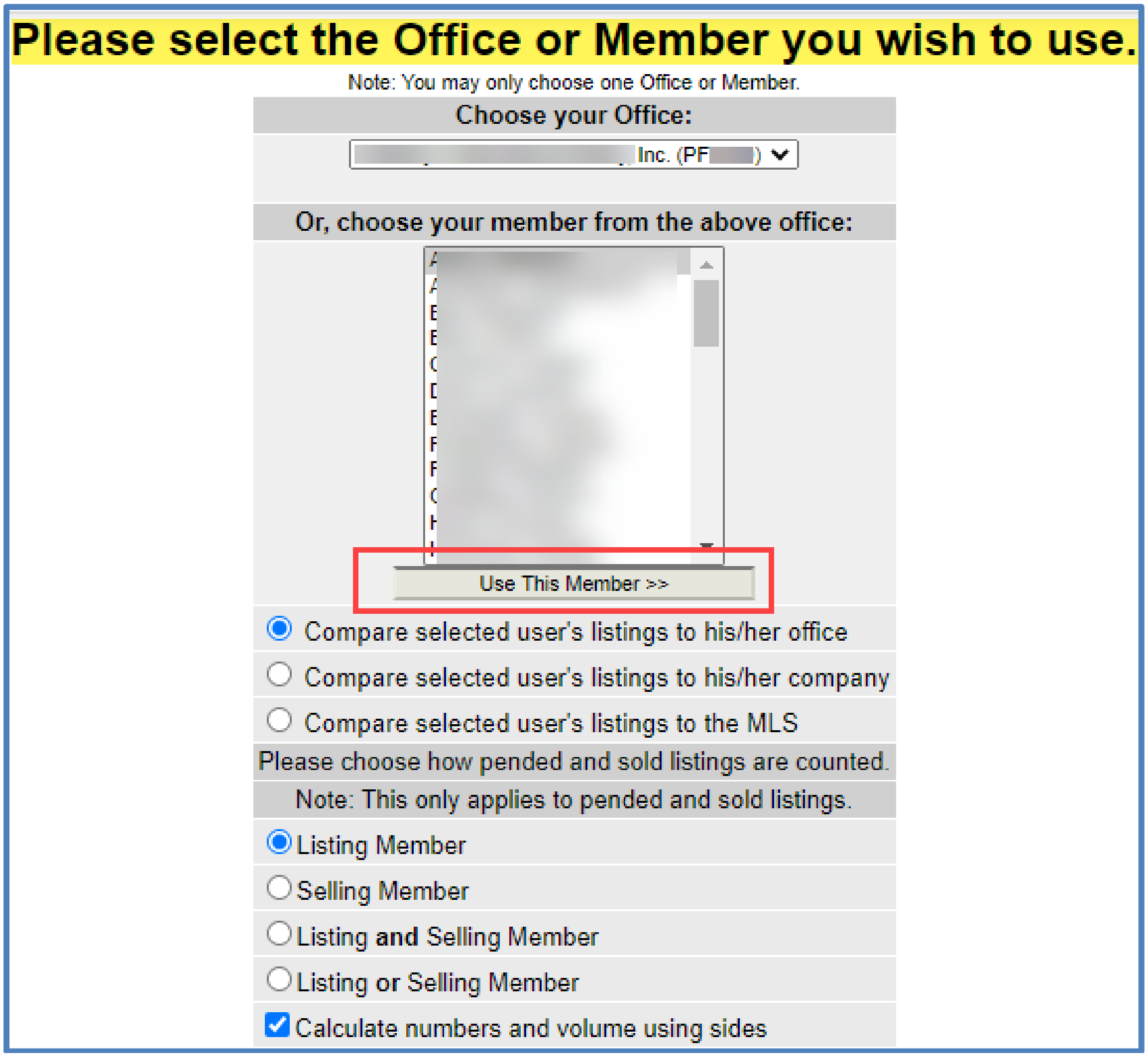
2. Scroll down and select Saturation Analysis report.



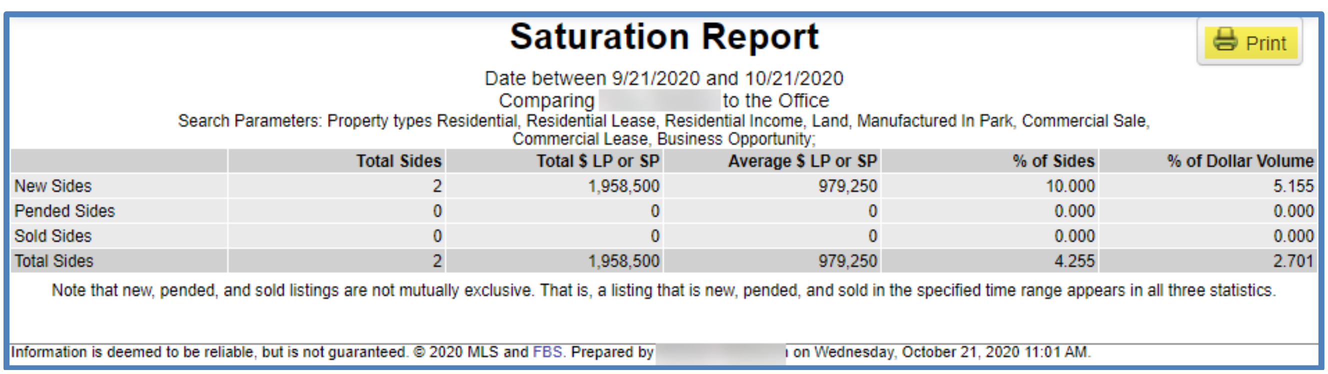
3. Select criteria in the Report Generation template and click **Next** to continue.


9 - Report Generation
Reporting Options
Property Type
Residential
Residential Lease
Residential Income
Land
Manufactured In Park
Commercial Sale
Commercial Lease
Business Opportunity
Status
Active
Active Under Contract
Coming Soon
Pending
Closed
Expired
Hold
Withdrawn
Current Price
From: 0
To: 999999999999
Property Sub Type
Boat Slip
Mixed Use
Single Family Residence
Condominium
Ranch
Water Position With Land
Farm
Stock Cooperative
Water Position Without Land
Townhouse
County
Start typing to search...
MLS Area
Start typing to search...
Subdivision
Start typing to search...
City
Start typing to search...
Beds Total
From: 0
To: 99
Baths Total
From: 0
To: 9999
Living Area
From: 0
To: 9999999
Lot Size Area
From: 0
To: 999999999999
Year Built
From: 0
To: 9999
Listing Member
Listing
Selling
Listing Office
Listing
Selling
Saved Searches
Filter by Saved Search
Select One
Report Chosen: Saturation Analysis
Saturation Comparison Types
Member
Office
Company Office
Market Share
Please enter a Begin Date and an End Date.
Begin Date: 9/21/2020
End Date: 10/21/2020
Next >>

4. Select the office (if applicable), the member you wish to use, and comparison options. Click **Use This Member** to generate the report.



5. Saturation Report example.



Saturation Report

Print

Date between 9/21/2020 and 10/21/2020

Comparing to the Office

Search Parameters: Property types Residential, Residential Lease, Residential Income, Land, Manufactured In Park, Commercial Sale, Commercial Lease, Business Opportunity;

	Total Sides	Total $ LP or SP	Average $ LP or SP	% of Sides	% of Dollar Volume
New Sides	2	1,958,500	979,250	10.000	5.155
Pended Sides	0	0	0	0.000	0.000
Sold Sides	0	0	0	0.000	0.000
Total Sides	2	1,958,500	979,250	4.255	2.701

Note that new, pended, and sold listings are not mutually exclusive. That is, a listing that is new, pended, and sold in the specified time range appears in all three statistics.

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Market Share Report

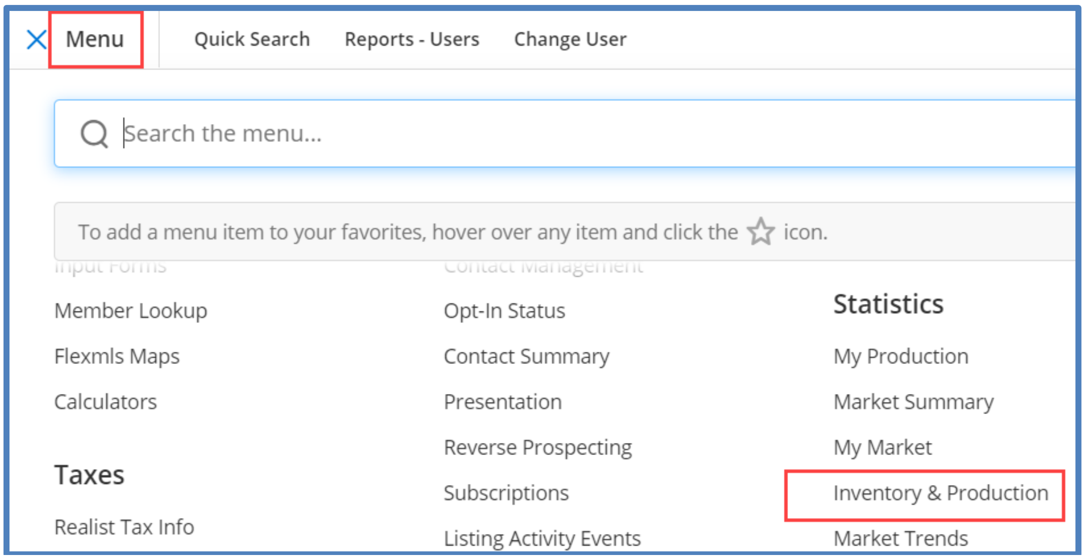
The Market Share Report shows the share of the MLS market that an office has during a time period.

In the Market Share option, the report will display a ranking for members, offices, companies, or companies and offices. You can calculate the Market Share option by number of dollar volume. Select “Include last year’s calculations” to compare statistics between last year and the current year.

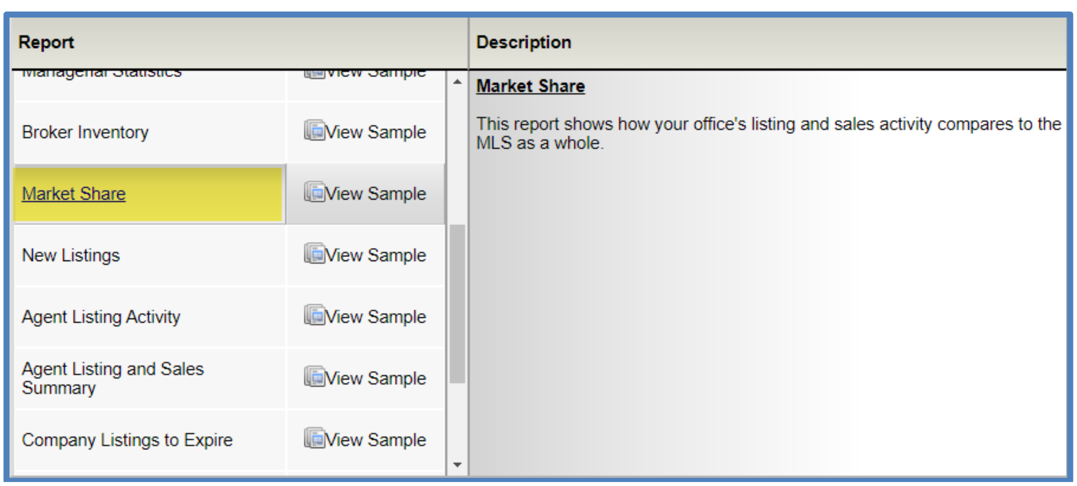
The report includes the option to calculate numbers and volume using sides.

The % columns display the percentage of sides or dollar volume according to the selections made when running the report. For example, the report could display a percentage based on a comparison to an office, or a percentage of the total volume for the MLS.

From the **Menu,** under **Statistics**, click on **Inventory and Production**.



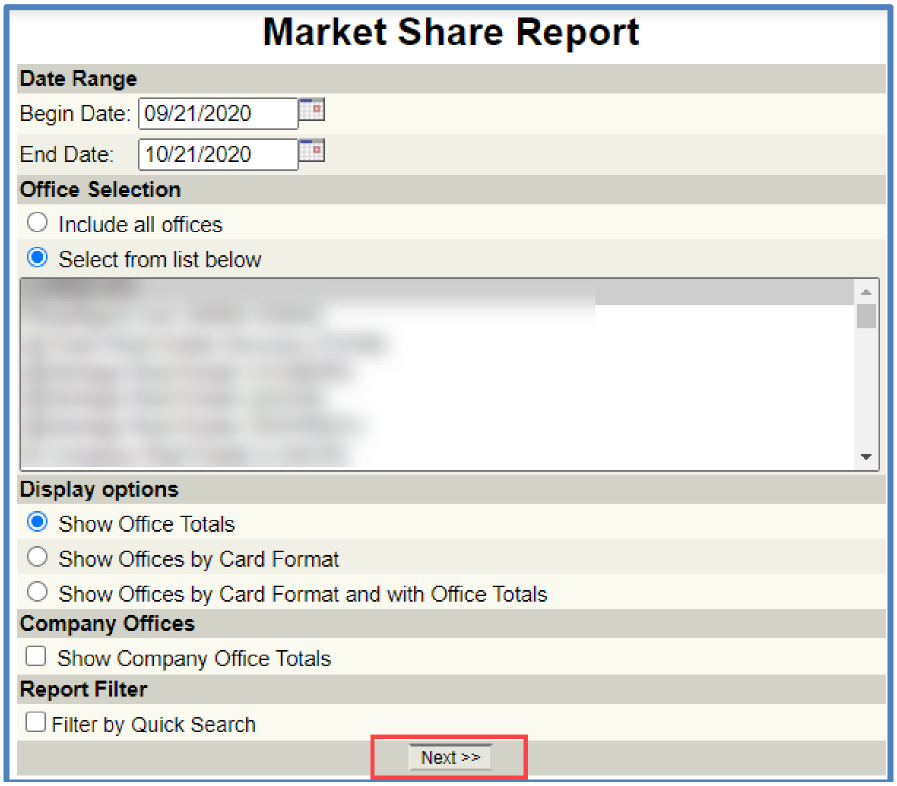
1. Scroll down and select Market Share.



2. Enter a date range for the report and choose the offices to include in the report (if applicable). Select one of the following display options:

- Show Office Totals – Combines all property types and compare the statistics for offices to statistics for the MLS.
- Show Offices by Card Format – Lists all activity per property type.
- Show Offices by Card Format and with Office Totals – Combines the two previous reports into one report format. Lists all activity per property type and includes totals for all offices.

3. Select whether to show company office totals, if the option is available. You can also filter the report using a Quick Search. When you are finished selecting report parameters, click **Next** to generate the report.



4. Market Share Report example.

Market Share Report

Print

Date between 9/21/2020 and 10/21/2020
for CRMLS

Office Totals

	Active			Own Office Sales			Co-op Sales/seller			Co-op Sales/lister			Total Sales				Average Sales
Office	Nbr	Volume	Pct%	Nbr	Volume	Pct%	Nbr	Volume	Pct%	Nbr	Volume	Pct%	Nbr	Pct%	Volume	Pct%	
	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	0.0	0.00	0	0.00	0
	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	0.0	0.00	0	0.00	0
	4.5	22,462,400	0.06	0.0	0	0.00	0.0	0	0.00	2.0	2,554,095	0.02	2.0	0.01	2,554,095	0.01	1,277,048
	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	1.0	960,000	0.01	1.0	0.00	960,000	0.00	960,000
	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	0.0	0.00	0	0.00	0
	4.5	22,462,400	0.06	0.0	0	0.00	0.0	0	0.00	2.0	2,554,095	0.02	2.0	0.01	2,554,095	0.01	1,277,048
	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	1.0	960,000	0.01	1.0	0.00	960,000	0.00	960,000
	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	0.0	0	0.00	0.0	0.00	0	0.00	0
All Offices Total	4.5	22,462,400	0.06	0.0	0	0.00	0.0	0	0.00	3.0	3,514,095	0.03	3.0	0.01	3,514,095	0.01	1,171,365
MLS total: All Property Types	41,553.0	35,742,858,652	100.00	9,268.0	4,770,584,908	100.00	14,263.0	10,408,991,082	100.00	14,263.0	10,408,991,082	100.00	37,794.0	100.00	25,588,567,072	100.00	677,053.69

Information is deemed to be reliable, but is not guaranteed. © 2020 MLS and FBS. Prepared by on Wednesday, October 21, 2020 11:30 AM.
The statistics shown above represent listing sides, not actual listings.

Email Notifications

Search Results, CMA and Reverse Prospecting

- Sends from listings@flexmail.flexmls.com
- Normally, the sender is copied on the email based on the option "Send a Copy to me"

Portal Auto Email (portal prospecting)

- Sends from Flexmls Notifier <listingupdates@flexmail.flexmls.com>

Listing Activity

- Sends from "Agent via Flexmls <listingupdates@flexmail.flexmls.com>"

Auto Hot sheets

- Email sent to the primary address on the user's account
- Preference to send emails is found within the user's General Preferences section of Preferences.

Opt-in emails

- These emails get sent out to contacts when the agent sets them up on a subscription; or, if they opt-out, the agent can resend the opt-in request.

Contact portal account information

- Sends from "{AgentName} via Flexmls <notify@flexmail.flexmls.com>"
- Contains login information for contact portal accounts

Prospect Email view notifications

- Sent to the agent when a prospect clicks on a listing link emailed to them by the agent
- Notification emails are sent from "Flexmls Notifier <notify@flexmail.flexmls.com>"

Tour of home notifications

- This runs when an agent adds an open house or tour of homes
- Contains information regarding the open house event
- Sent to MLS primary email account

Email Me

- The Email Me button on my.flexmls.com/PORTALNAME pages allow the user to send messages to the agent

Password reset password@flexmail.flexmls.com

- Email is sent to the primary email address on the username's account that's entered
- Password requests on portals also send from this address

IDX Portal

- On portal signup, portal emails are sent from the user's address from within their profile messages@flexmail.flexmls.com

'Agent to Agent' and 'Agent to portal user' "Messages"

- If an agent sends another agent a message in Flexmls, and the receiving agent gets an email from that message, it will be sent from messages@flexmail.flexmls.com
- The Reply-To address will be in the format of <msgsys+CODE@flexmail.flexmls.com>

- IDX lead emails – Emails that are sent to the agent that has an FBS IDX subscription when a contact signs up for a portal through their IDX site

Agent contact information change notifications ContactInfoChange@flexmail.flexmls.com

- Sent when an agent changes their primary contact information
- Contains information about what was changed
- Sent to MLS primary email

Listing Off market reminder listing_status@flexmail.flexmls.com

- Sent to the listing agent when a listing goes off market
- Reminds agent to return the SUPRA key box

Pending Warnings

- Emails are sent from listing_status@flexmail.flexmls.com
- Email is sent to the listing agent only of a pending listing

Listing Expirations

- Sends from Flexmls Notifier <mlsmail@flexmail.flexmls.com>
- Message only gets sent if the user has the expiration preference set under their General Preferences
    - Preference reads "Send email notification of expiring listings [X] days before expiration"

"No photo" notifications

- Sent 'X' days after a listing is entered if a photo has not been uploaded
- Sent to Listing agent, co-listing agent, office, company, MLS, and/or managing broker
- Sent from "Flexmls Notifier <mlsmail@flexmail.flexmls.com>"
- Sent at 3:15am CST

Listing change notifications

- Sent when a listing is changed
- Contains information about what was changed
- Sent to MLS primary email account

Error Report or Report Violation

- If an MLS Staff or an Agent uses the Report Violation (Error Report), it is sent out from "report@flexmail.flexmls.com"

Instant Prospecting Emails instpros@flexmail.flexmls.com

Forms Emails forms@flexmail.flexmls.com

Broker Resources

Looking for help with this manual or anything else? For all questions and concerns, please do not hesitate to contact our Customer Care team at 800-925-1525 or 909-859-2040. If you're a broker or office admin and need dedicated service, you may also call our Broker Helpline at **909-859-2043**.

Brokers and other accepted user classes may contact our Broker Resources & Member Engagement department:

Amy A. Ulloa-Zúñiga
Director of Broker Resources & Member Engagement
O: 909-978-3178
Amy@crmls.org
brokers@crmls.org
crmls.org/brokers

Our support hours are Monday-Friday 8:30 AM – 9 PM; Saturday & Sunday 10 AM – 3 PM.

CRMLS Support Resources

Should you have any questions or need help getting started, please do not hesitate to contact our Customer Care team at 800-925-1525 or 909-859-2040.

Monday – Friday 8:30 a.m. to 9:00 p.m.

Saturday and Sunday 10:00 a.m. to 3:00 p.m.

Finally, please be sure to connect with us on social media at the links below so that we can provide you with the most up to date information on what we are working on here at CRMLS.

Social Media

- fb.com/CRMLS
- @CRMLSNews
- YouTube.com/crmlstv
- LinkedIn

It's My Business

- It's My Business
- fb.com/ItsMyBusinessOfficial
- @itsmybizCA