Fusion 2

CBR Fusion MLS
Level 2 – Automation

Class Handout

Custom Search

Saved Searches

You can save search criteria that you run often, or want to use for a prospect or hotsheet.

Creating Saved Searches

 To create a new saved search:

1. Set your search criteria. View the results on the results screen, if desired.
2. Click the **Save Search** button to open the save search screen.
3. Type a name in the **Search Name** box.
4. If desired, type a description of the search in the **Description** box.
5. Depending on your permission level, you may have the option to make the search available to your firm, office, or just yourself.
6. If you want to attach the search to a contact, click the **Notfication Settings** button and set the notification options.

7. Click **Save**.

 To create a new saved search based on an existing saved search:

1. Load a saved search.
2. Modify the search criteria as needed.
3. Click the **Save Search** button to open the save search screen.
4. Select Save as new search.
5. Type a name in the **Search Name** box.
6. If desired, type a description of the search in the **Description** box.
7. Depending on your permission level, you may have the option to make the search available to your firm, office, or just yourself.
8. If you want to attach the search to a contact, click the **Notfication Settings** button and set the notification options.
9. Click **Save**.

Modifying Saved Searches

 To modify a saved search:

1. Load a saved search.
2. Modify the search criteria as needed.

3. Click the **Save Search** button to open the save search screen.
4. Select **Save Changes to current search**.
5. If you want to attach the search to a contact, click the **Notification Settings** button and set the notification options.
6. Click **Save**.

Search Manager/Prospect Search Manager

The Search Manager

The search manager organizes your saved searches and enables you to associate them with contacts for prospecting. From the Search Manager, you can quickly review and edit auto-notification settings such as frequency and expiration date. You can also access a contact website from the search manager.

To open the Search Manager, select **Search Manager** from the **Search** menu. Click a contact's name to view his or her information in the contact manager detail panel. Click a search name to open the search criteria page.

Creating Saved Searches from the Search Manager

□ To create a new saved search:

1. From the search manager, click the **New Search** button to open the search criteria page.
2. Set the search criteria as desired.

3. Click the **Save Search** button to open the save search screen.
4. Type a name in the **Search Name** box.
5. If desired, type a description of the search in the **Description** box.
6. Depending on your permission level, you may have the option to make the search available to your firm, office, or just yourself.
7. If you want to attach the search to a contact, click the **Notfication Settings** button and set the notification options.
8. Click **Save**.

Modifying Search Criteria from the Search Manager

□ To modify search criteria for a saved search:

1. From the search manager, click the name of the search you want to modify. The search criteria page will open.
2. Make any desired changes.
3. Click the **Save Search** button to open the save search screen.
4. Select **Save Changes to current search**.
5. Click **Save**.

Deleting Searches

□ To delete searches from the search manager:

1. From the search manager, select the check box next to the searches you want to delete.
2. Click the arrow on the **Tools** menu and select **Delete**.
3. When prompted to confirm the deletion, click **OK**.

Renaming Searches

□ To rename a saved search:

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Type a new name in the **Search Name** box.
4. Click **Save**.

Associating an Existing Search with a Contact

□ To associate a search with a contact:

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.

3. Select a contact from the **Link this search to this contact** list.
• To create a new contact from the settings screen, click the new contact button [ ].
4. Click **Save**.

Enabling and Disabling Auto-notification

To enable auto-notification:

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Select the **Turn on auto-notification for this search** check box.
4. If the search is associated with a contact, select how you want him or her to view listings:
• Contact web site
• E-mailed report
5. Specify the other search settings as desired.

6. Click **Save**.

To disable auto-notification

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Deselect the **Turn on auto-notification for this search** check box.
4. Click **Save**.

Auto-notification Settings

The search settings screen enables you to change a search's auto-notification settings. To open the search settings screen, click the link in the **Active** column of the search manager.

Settings Tab

From the **Settings** tab, you can
• Associate a contact with the search
• Activate and deactivate auto-notification
• Set the number of days that auto-notification will be active
• Select how you want listings delivered to your contact (via website or emailed report)
• Edit the description of the search that appears on the client website
• Specify the default search results grid you want to use
• Set the access level for the search (firm, office, personal). This option may not be available to all users.

Frequency Tab

The **Frequency** tab enables you to specify
• How often auto-notification runs
• The conditions (e.g., price change, status change) that will cause a listing to be re-sent

Contact Email Tab

From the **Contact Email** tab, you can
• Specify additional recipients for auto-notification e-mails
• Set the text that appears in auto-notification e-mails

• Specify the report format you want the client website to use

Agent Notification Tab

The **Agent Notification** tab enables you to

• Specify if, and how, you want to receive copies of auto-notification emails
• The report format you want to receive

Viewing Search Results from the Search Manager

□ To view results for a saved search from the search manager:

From the search manager, click the link in the **#New** (to view only new results) or **#All** column (to view all results).

The search results page for a saved search provides all the features of a regular search results page, plus a **Tools** menu. Select listings and choose an option from the **Tools** menu to

• Mark a listing as viewed, new, favorite, reject, etc.
• Remove a designation

Extending the Expiry Date

□ To extend a search's auto-notification expiry date:

1. From the search manager, select the check box next to the search whose expiry date you want to extend.
2. Click the arrow on the **Tools** menu and select **Extend Expiry Date** to open the expiry date dialog.
3. Enter the number of days to extend auto-notification.
4. Click **Apply Now**.

Marking Searches as Viewed

Marking a search as viewed changes the status of all new search results from "new" to "viewed."

□ To mark searches as viewed:

1. From the search manager, select the check box next to the searches you want to mark as viewed.
2. Click the arrow on the **Tools** menu and select **Mark as Viewed**.
3. When prompted to confirm, click **OK**.

Contact Manager

The Contact Manager

The Fusion MLS contact manager enables you to keep your contacts organized. You can add, remove, and edit contacts from this page. You can also manage your contacts' prospecting searches and contact websites from the contact manager.

Select the **Contact Manager** option from the **Contacts** menu to open the contact manager.

1. **Search box**: type a contact's name or e-mail address to narrow the contact list.
2. **Grid list**: select a display grid.
3. **Grid manager button**: click to open the grid manager.
4. **Save grid button**: click to save changes to a custom grid.

5. **Add contact button**: click to add a new contact.
6. **Contact details button**: click to open the contact details panel for the currently-selected contact.
7. **Sort button**: click to sort the contact list.
8. **Filter button**: click to filter the contact list.
9. **Print button**: click to print the contacts grid or contact reports.
10. **Tools menu**: click to perform various functions, such as deleting, emailing, importing, and exporting contacts.
11. **Letter bar**: click a letter to narrow the contact list to those contacts whose first or last name starts with the selected letter.
12. **Email column**: click the icon to send a message to a contact.
13. **Notes column**: displays the number of notes on the contact website.
14. **Favorites column**: displays the number of favorite listings on the contact website.

15. **Possibilities column**: indicates the number of possibilities on the contact website.
16. **Rejects column**: displays the number of rejected listings on the contact website.
17. **Recommendations column**: displays the list of recommended listings on the contact website.
18. **Contact website column**: click the icon to open the contact website.

Adding Contacts

To add a new contact:

1. Open the new contact form by
• Selecting **Add New Contact** from the **Contacts** menu.
• Clicking the **Add Contact** button on the Contact Manager page.
2. Enter the new contact's information in the new contact form. Red labels indicate required fields.
• The **Other Phone 1** and **Other Phone 2** fields are customizable: you can delete the label text and type your own field name.
3. Click the **Save** button.

Importing Contacts

Before you begin the import process, you must export a comma-separated value (.csv) list from your e-mail program to your computer. If you do not know how to do this, consult your e-mail program's help system.

The .csv file that you import into Fusion MLS should contain the following data, in this order:

• First Name
• Last Name
• Email
• Home Phone
• Cell Phone
• Work Phone
• Fax Phone
• Pager Phone
• Address
• City
• State

• Zip

• Work Address
• Work City
• Work State
• Work Zip

To import contacts into Fusion MLS:

1. Select **Import** from the **Tools** menu to open the import contacts screen.
2. Click the **Select File** button to open a choose file dialog.
3. Select the file you want to import.
4. Click **Open** to return to the import contacts screen.
5. Select a duplicate record handling option.
6. Click the **Import** button.

Exporting Contacts

To export a contact list from Fusion MLS:

1. If you only want to export certain contact records, select them before beginning the export process.
2. Select **Export** from the **Tools** menu to open the export contacts screen.
3. Select a records option:
• Selected records
• All records
4. Select a data format option:
• Comma-delimited (.csv)
• Tab-delimited (.txt)
5. If you want to compress the exported list as a .zip file, select the **Compress file** option.
6. Select the grid format that you want to export.
7. If you want the exported file to contain column headings, select the **Include Column Headers** option.
8. Click the **OK** button.
9. When prompted to open or save the file, select **Save** to open a save file dialog.
10. Select the location on your computer where to you want to save the exported list.
11. Click **Save**.

Deleting Contacts

To delete contacts:

From the contact list:
1. Select the next box next to the contacts you want to delete.
2. Click the **Tools** button and select **Delete Selected**.
3. When prompted to confirm the deletion, click **OK**.

From the contact panel:
1. Click the delete button [ ].
2. When prompted to confirm the deletion, click **OK**.

Sorting the Contact List

To sort the contact list:

1. Click the **Sort** button to open the sort options panel.
2. Select sort columns from the **Sort By** and **Then By** lists.
3. If necessary, click the ascending [ ] or descending [ ] buttons to change the sort direction.

Contact Search

If you have a long contact list, the contact search feature can help you locate a contact quickly.

To find a contact by name or e-mail address:

Type the contact's name or e-mail address in the search box. Fusion MLS will narrow the contact list as you type.

Click the erase button [ ] to restore clear the search box and restore the complete contact list.

Filtering the Contact List

To filter the contact list:

1. Click the **Filter** button to open the filter options panel.
2. Select the desired filtering options.

Alphabetical Filtering

To filter the contact list alphabetically:

Click a letter in the letter bar. Only contacts whose first or last name begins with the selected letter will be displayed.

Click **All** to display all contacts.

The Contact Details Panel

The contact details panel enables you to see all your contact's important data at a glance: personal information, saved searches and properties, and contact website statistics.

You can attach searches to a contact, update his or her personal information, and change personal website settings from the contact details panel.

Click a contact's first or last name in the contact manager to open the contract details panel.

Expanding and Collapsing Sections

To expand and collapse sections in the client details panel:

Click the expand section [ ] or collapse section [ ] button.

Editing Contact Information

To edit contact information:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the contact panel, click **Update Contact Info** (in the **Personal Info** section) to open the edit contact form.
3. Make the desired changes.
4. Click **Update Changes.**

E-mailing Contacts

To e-mail contacts:

From the contact list:

1. Select the next box next to the contacts you want to e-mail.
2. Click the **Tools** button and select **Email Selected** to open an e-mail form.
3. Compose the message and click **Send**.

From the contact panel:

1. Click the e-mail button [ ] to open an e-mail form.
2. Compose the message and click **Send**.

Viewing a Contact’s Saved Properties

 To view a contact’s saved properties:

1. From the contact manager, click a contact’s first or last name to open the details panel.
2. From the **Saved Properties Info** section, click **View All Properties** to open the saved properties screen.

To see only a specific type of saved property (e.g., favorite, possibility), click the appropriate indicator icon at the top of the panel.

Viewing Search Results from the Contact Details Panel

 To view all results for a saved search from the contact manager:

1. From the contact manager, click a contact’s first or last name to open the details panel.
2. From the Search Info section, click a search’s view results button [ ] to open the contact search results page.

The search results page for a saved search provides all the features of a regular search results page, plus a **Tools** menu. Select listings and choose an option from the **Tools** menu to

• Mark a listing as viewed, new, favorite, reject, etc.
• Remove a designation

Viewing a Contact’s Address on a Map

 To view a contact address on a map:

1. From the contact manager, click a contact’s first or last name to open the details panel.
2. From the **Personal Info** section, click an address to open a map in a new window.

Contact E-mail History

The e-mail history section displays a list of the e-mails that have been sent to a contact from Fusion MLS. The **Event** column indicates whether an e-mail was sent manually or through auto-notification.

Viewing E-mail History Items

 To view an e-mail history item:

1. From the contact details panel, open the **Email History** section.
2. Click the link in the **Subject** column to open the read message screen.

Deleting E-mail History Items

 To delete an item from a contact’s e-mail history:

1. From the contact details panel, open the **Email History** section.
2. Select the checkbox next to the items you want to delete.
3. When prompted to confirm the deletion, click **OK**.

Associating a Contact with an Existing Saved Search

 To associate a contact with an existing saved search:

1. From the contact manager, click a contact’s first or last name to open the details panel.
2. From the **Search Info** section, click **View Searches within the**

Search Manager to open the search manager.
3. From the search manager, click the link in the **Active** column to open the search setting screen.
4. Select **Save changes to current search**.
5. Click the **Notification Settings** button to open the notification settings screen.
6. Select a contact from the **Link search to this contact** list.
7. Set the remaining notification options as desired.
8. Click the **Save** button.

Creating a New Saved Search for a Contact

To create a new saved search for a contact:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Search Info** section, click **Add new search** to open the search criteria page.
3. Select the desired search criteria.
4. Click **Save Search** to open the save search dialog.
5. Type a name for the search in the **Search Name** box.
6. Set the notfication options as desired.
7. Click **Save** to save the search.

Printing Contact Reports

To print contact reports:

1. Click the **Print** button [ ] to open the print options screen.
2. Select the **Reports** print option.
3. Select the reports to print from the **Reports to be printed** list:
• The available reports are divided into groups. To expand or collapse the report groups, click the triangle next to the group name.
• Select the check box next to a report name to include that report in the print job.
4. Click **Show Report Order** to expand the print options screen.
5. Reorder the reports if desired:
5.1. Click the report you want to move and hold the left mouse button.
5.2. Drag the report to its new position.
5.3. Release the left mouse button.
6. If you want to collate the reports by record, rather than report type, select the **Collate reports with a to print each listing on consecutive pages** check box.
• For example, if you selected 3 records to print, and 2 reports for each, selecting this option would result in the following print order:
• Record 1: Report 1
• Record 1: Report 2
• Record 2: Report 1
• Record 2: Report 2
• Listing3: Report 1
• Record 3: Report 2
• Not selecting this option would result in this print order:
• Record 1: Report 1

• Record 2: Report 1

• Record 3: Report 1
• Record 1: Report 2
• Record 2: Report 2
• Record 3: Report 2
7. If desired, click the **Preview** button to see a print preview.
8. Click the **Print** button to open a print dialog.
9. Select your print options.
10. Click **Print**.

Printing the Contact Manager Grid

To print the contact manager grid:

1. Click the **Print** button [ ] to open the print options screen.
2. Select an item to print:
• Single record. If you select this option, select the record to print from the list under the option.
• If you have selected any records from the previous screen, the **Selected** option is available. Choose this to print the selected records.
• All. Select this option to print all records from the previous screen.
3. Select the **Results Grid** print option.
4. Select a **Paper** option.
5. Select a **Layout** option.
6. If desired, click the **Preview** button to see a print preview.
7. Click the **Print** button to open a print dialog.

8. Select your print options.
9. Click **Print**.

Printing Envelopes from Contact Records

To print envelopes for contacts:

1. Click the **Print** button [ ] to open the print options screen.
2. Select the **Reports** print option.
3. Select an envelope option from the reports list.
4. If desired, click the **Preview** button to see a print preview.
5. Click the **Print** button to open a print dialog.
6. Select your print options.
7. Click **Print**.

Prospecting

Prospecting

Prospecting is a term applied to the act of finding listings that meet a client's needs, and then sending listing information to the client for review. Fusion

MLS prospecting tools include the search manager, contact manager and contact web site.
The search manager enables you to create customized searches for a contact. You can schedule these searches to run automatically and notify your clients when a search finds listings that meet their needs.
The contact manger helps you to organize your clients and their contact information. The contact manager also provides quick access to the prospecting searches linked to a contact.
The contact web site provides a personalized web site for a contact, displaying listings that meet the criteria for the prospecting searches that you have created for the contact.

Prospect Searches

A prospect search is a saved search that you have assigned to a contact. You can schedule the search to run automatically and notify the contact of any new listings that the search returns (*auto-notification*).
Both the contact manager and search manager enable you to create, view, and edit prospect searches.

Linked Listings

You can link a single listing to one or more of your contacts. Linking a listing adds it to the contact web site as a recommended property (you can change the listing's category from the linked contacts panel). This can be useful when you encounter a listing that you think will interest a client, even though it is not returned by any of the saved searches that you have set up.
You can link listings to contacts from the search results or search details page.

Linking Listings

To link a listing to a contact from the search results page:

1. Move your cursor over the search result ID label [ ] to open the mini-report.
2. Click the linked contacts icon [ ] to open the linked contacts panel.
3. Select a contact from the contact list.
4. Click the **Link** button to link the listing to the contact.
5. If desired, click the icon in the **Email** column to e-mail the listing to the client.
6. If desired, click the icon in the **Notes** column to add notes or change the listing's category (e.g., favorite or recommended) on the contact web site.

To link a listing to a contact from the search details page:

1. Click the **Linked Contacts** icon to open the linked contacts panel.
2. Select a contact from the contact list.
3. Click the **Link** button to link the listing to the contact.
4. If desired, click the icon in the **Email** column to e-mail the listing to the client.
5. If desired, click the icon in the **Notes** column to add notes or change the listing's category (e.g., favorite or recommended) on the contact web site.

Unlinking Listings

To unlink a listing from a contact, from the search results page:

1. Move your cursor over the search result ID label [ ] to open the

mini-report.
2. Click the linked contacts icon [ ] to open the linked contacts panel.
3. Click the unlink button [ ].

□ To unlink a listing from a contact from the search details page:

1. Click the **Linked Contacts** icon to open the linked contacts panel.
2. Click the unlink button [ ].

Auto-notification

When you create a prospect search, you can schedule it to run automatically at specific times and notify your contact of any new listings that the search finds. This is called auto-notification. The e-mail notification can contain a link either to a contact web site, which displays all the listings ever matched by a prospect search, or a listing report, which only displays the most recently matched listings.

Enabling and Disabling Auto-notification for a Search

□ To enable auto-notification:

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Select the **Turn on auto-notification for this search** check box.
4. If the search is associated with a contact, select how you want him or her to view listings:
   • Contact web site
   • E-mailed report
5. Specify the other search settings as desired.
6. Click **Save**.

□ To disable auto-notification

1. From the search manager, click the link in the **Active** column to open the search settings screen.
2. Select **Save changes to current search**.
3. Deselect the **Turn on auto-notification for this search** check box.
4. Click **Save**.

Auto-notification Settings

The search settings screen enables you to change a search's auto-notification settings. To open the search settings screen, click the link in the **Active** column of the search manager.

Settings Tab

From the **Settings** tab, you can
• Associate a contact with the search
• Activate and deactivate auto-notification
• Set the number of days that auto-notification will be active
• Select how you want listings delivered to your contact (via website or emailed report)
• Edit the description of the search that appears on the client website
• Specify the default search results grid you want to use
• Set the access level for the search (firm, office, personal). This option

may not be available to all users.

Frequency Tab

The **Frequency** tab enables you to specify

• How often auto-notification runs

• The conditions (e.g., price change, status change) that will cause a listing to be re-sent

Contact Email Tab

From the **Contact Email** tab, you can

• Specify additional recipients for auto-notification e-mails

• Set the text that appears in auto-notification e-mails

• Specify the report format you want the client website to use

Agent Notification Tab

The **Agent Notification** tab enables you to

• Specify if, and how, you want to receive copies of auto-notification emails

• The report format you want to receive

Default Auto-notification Settings

You can specify default auto-notification settings that will be applied automatically to a prospect search when you create it.

To specify default auto-notification settings:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.
2. Select **Auto-Notification Defaults** to open the auto-notification default settings screen.
3. Edit the default settings as desired.
4. Click the **Save** button.

CMA Wizard

The CMA Wizard guides you through each step of the CMA creation process. The CMA Wizard is accessed from the search results page using the icon located in the top right hand corner of the screen.

Alternately you can start a new CMA from the CMA tab by selecting the **Create New CMA** option. The two differences between this option and starting from a set of search results are: The property type will not be grayed out if starting from the navigation tab as the user has not yet conducted a search and secondly no comparable properties will be visible yet in step 3 of the CMA Wizard as once again a search has yet to be conducted. If starting from a listing search after selecting the comparable properties, the property type will have already been determined and the selected properties chosen will then be visible in step 3 as your comps.

CMA Wizard Steps

Getting Started (Step 1)

Select the **Type of CMA** you want to create from the available options, **Buyer** or **Seller**. You will be presented with a different set of reports depending on which type you select in future steps.

If you have begun the wizard from a listing search, the property type is already selected, if not, select a property type from the drop down list.

Next select a **Contact** you want to associate this CMA with from the list of saved Contacts you have in Fusion.

When you select a contact from the list the **Name of this CMA** will auto populate, this is an editable option.

If you place a check in the box next to **Use Client's home address as the Subject property**, the address of the selected Contact will transfer over to step 2, if that information was originally entered on the Contact record. This is not a required step.

After completed step 1 **Getting Started**, select the **Next Step** option at the bottom of the page. Selecting **Close** will close the page and all information will be lost including any comps you have selected in your listing search.

Once you select the **Next Step** option, your CMA will be saved and can be accessed in the **CMA Manager** for completion at a later time if needed.

Subject Property (Step 2)

In this step the user has multiple options to enter the **Subject Property** information by **Manually** entering the data, importing through a **Listing Search**, **Auto Populating** from a tax provider (i.e. Realist), or through a **Tax Search** (if integrated tax is part of the site).

Manual entry is done by typing the information in the available fields shown on the page.

Listing Search is done by selecting the **Listing Search** button at the bottom of the screen which will open a listing screen. Follow the instructions on the top of the page.

If the import is done from a **Listing Search**, the primary photo will appear in the photo slot on the ride hand side of the page, if one is found on the listing. This photo may be deleted or changed if desired. If no photo appears, one may be uploaded. In addition the property location will be mapped, this can be edited if the location is not correct or the property can be located.

Tax Search will open a tax search screen (integrated tax) and is not available to all accounts. Follow the same instructions as listed above for a **Listing Search**.

Tax Auto pop will allow the user to auto populate tax information for a third party tax provider that may be integrated into the site (i.e. Realist). Search by Address or Tax ID for the subject property, select the property when found, and then click the **Use the Selected Property** button at the bottom of the screen to auto populate the information into the subject property page.

Use the **Next Step** or **Previous Step** buttons to move from section to section, or click a step heading in the left navigation strip.

Comparables (Step 3)

In this step the comparables will either appear in the grid (from the original search) or the opportunity to search for comparables will be presented if the grid is empty.

The same options presented in Step 2 are available to bring in comparable properties (if this was not done in the original search) by importing through a **Listing Search**, **Auto Populating** from a tax provider (i.e. Realist), or through a **Tax Search** (if integrated tax is part of the site).

The ability to view search results in a different grid view, see the property images (if present), map the properties, sort, and delete (from the tools dropdown) are presented as options in the header above the grid.

Use the **Next Step** or **Previous Step** buttons to move from section to section, or click a step heading in the left navigation strip.

Adjustments (Step 4)

The adjustments screen enables you to enter price adjustments for each of your comparable properties. You are also given the ability to enter free form text for descriptions, add values, make adjustment, and add comments as needed. These functions are found at the bottom of the page.

Use the **Next Step** or **Previous Step** buttons to move from section to section, or click a step heading in the left navigation strip.

Pricing (Step 5)

The pricing screen enables you to review the prices for all comparables, calculate a suggested price for the subject property based on different values or manually set a price and/or range for the subject property.

The CMA wizard provides several options for establishing a suggested price for your subject property:

- The suggested price can be based on your sold comparables with the average selling price being the default.
- The suggested price can be based on the high, low, median, or average price of your comparables. Additionally assessed tax value ratio and price per square foot may also be options.
- You can manually enter a suggested price.

To enter a suggested price manually:

1. Select **manually enter** from the drop-down list.
2. Type the suggested price in the **Suggested List Price** box.

To enter a suggested price range manually:

1. Select **manually enter** from the second drop-down list.
2. Type low and high values for the range in the **Suggested List Price Range** boxes.

Use the **Next Step** or **Previous Step** buttons to move from section to section, or click a step heading in the left navigation strip.

Report Pages (Step 6)

The reports screen enables you to set the appearance of your presentation and specify the reports that will appear in it. You can also manage your CMA presentation library and upload or create custom reports from the report screen.

If you already have a presentation template in your presentation library that you want to use, you can apply it from the Reports screen by selecting it from the CMA Presentation Template Drop down List.

To add a report page to your presentation:

From the Available Reports list click and drag the report from the available reports list to the selected reports list; move up or down as needed.

Three of the five options referenced below , Edit Report, Copy Report, and Create New Report are ONLY available if you are using the internet Explorer browser as they utilize the Report Manager to perform these functions which is ONLY compatible with Internet Explorer.

If using other browsers (Firefox, Safari, and Chrome), only the Preview Report and Upload PDF as New Report will be seen.

Uploading Custom Reports

If the CMA Wizard's available reports do not suit your needs, you can create custom reports or upload PDF documents to include in your presentations.

Uploading a PDF Document

Be sure that your PDF document does not exceed the size limit specified in the upload dialog.

To upload a PDF document to your CMA presentation:

1. From the CMA Wizard's Reports screen, click the **Upload PDF as New Report** button (and select **Upload PDF Report** to open the upload PDF dialog

1. Click the **Select a File** button to open a select file dialog.
2. Navigate to the file you want to upload.
3. Click the file to select it.
4. Click **Open**. The select file dialog will close and you will return to the upload PDF dialog.
5. Type a name in the **Report Name** box.
6. Select an option from the **Availability** list:
   - **Make this report exclusively for this CMA for…**
   - **Allow this report to be available for other CMA Presentations**
7. Click **Save** to upload the file.

To add or remove pages from your presentation:

Review the options under the Page Numbers drop down list.

To add background stationary to your presentation, select from the options available from the options in the drop down list next to the Stationary option. You can also preview the option by selecting the "paint brush" option.

To add or customize a footer for your presentation

Review the options under the Footer drop down list.

The footer can be edited using the editing tool (pencil and paper icon). This is a condensed version of the Report Manager function. NOTE: This condensed version is available to use with all browser types.

View/Email CMA (Step 7)

Select the desired option in which to share your presentation. NOTE: The checkbox allowing the CMA to be available on the Contact Website is only available to Fusion PRO users.

Additional Notes:

CMAs created in Fusion are displayed as PDFs, both to agents within Fusion as well as to clients to whom the reports are emailed

- Emailed CMAs are sent as a link to the PDF and do not include the PDF as an attachment
- The CMA Name is used as the text label of the report hyperlink

CMAs created in MLXchange or Tempo can be edited in Fusion but will be viewable only as PDFs from that point forward. An alert is displayed when the CMA is edited that this "conversion" will occur, and the agent can cancel instead if desired.

There is no visual distinction made between CMAs created in MLXchange and those created in Fusion in either the MLXchange CMA Manager or in the Fusion CMA Manager.

When a CMA is created or last saved in MLXchange or Tempo and the user attempts to view or edit it in Fusion from the CMA Manager:

They receive the following alert:

If they convert it then:

- The CMA will be displayed as a PDF to the agent while within Fusion, just as if the CMA had been created in Fusion.
- The CMA will be displayed as a PDF to the client, regardless of whether it was emailed to the client from Fusion or MLXchange, before or after the "conversion", or as an emailed link or posted on the AWP.
- The same exact set of reports that were included in the CMA in MLXchange will still be included (even a report like the Sellers Net Sheet which the agent cannot configure in Fusion will be included unless the agent removes it).

If they cancel then the CMA remains as-is and it is not opened in Fusion.

When a CMA is created or last saved in Fusion and the user attempts to open it in MLXchange, from either the CMA Manager or the "CMAs" tab of the associated Client's detail record:

They receive the following alert

If they click OK then:

- The CMA will be displayed via the usual MLXchange CMA viewer within the CMA Wizard to the agent, just as if it was created in MLXchange.

The CMA will be displayed via the usual MLXchange CMA viewer to the client, regardless of whether it was emailed to the client from Fusion or MLXchange, before or after the "conversion", or as an emailed link or posted on the AWP

- The same exact set of reports that were included in the CMA in Fusion will still be included

Any uploaded PDF reports included in the CMA will display as blank pages in that MLXchange CMA viewer, save for a brief message on the page that "This report can only be viewed when included in a PDF"

If the CMA is saved or printed in the Wizard via the "Save as PDF" button then any uploaded PDF reports included in the CMA *will* display, just as in Fusion.

If they cancel then the CMA remains as-is and it is not opened in MLXchange.

Presentation Library

Your presentation library is a collection of CMA presentation templates. You can access your library from the CMA Tab by clicking on the **CMA Presentations Library** option.

The column headers (i.e. **Property Type, Presentation Type**, etc.) enable you to filter the available presentations. You can use the library manager to add, edit, copy, and delete presentations.

Creating a New Presentation Template

To create a new presentation template:

1. From the **CMA Presentation Library** screen, click the **New CMA Presentation** button and the **Property Type.**
2. Click the **Create New Presentation** button to open the presentation editor.
3. Type a name in the **Presentation Name** box.
4. Type a report title in the **Description** box.
5. Select a theme for the presentation.
   - Select a theme from the **Stationery** list.
   - Click the **View Choices** button and select a theme from the palette.
6. Select a footer option from the **Footer selection** list.
   - Click the **Edit** button to edit the footer settings.
7. Select a **Page Numbers** option.
8. Select the reports to include in the presentation.
   - Click and drag reports from the **Available Reports** list to the **Selected Reports** list.
   - Click a report to select it and use the move right and move left buttons to move reports from one list to another.
   - Click the **All** button to move all reports from the **Available Reports** to the **Selected Reports** list.
   - Click the **Create/Upload Report** button to create or upload a custom report.
9. Click **Save**.

Copying a Presentation Template

Copy a presentation template:

1. From the CMA Presentation Library screen, select a presentation to copy and then select the copy button.
2. Rename the presentation, change as needed, then click save.

Editing a Presentation template

1. From the CMA Presentation Library screen, select a presentation to edit and then select the edit button.
2. Edit as needed, then click save.

Delete a presentation template from your library:

1. From the CMA Presentation Library screen, select a presentation to delete and then select the delete button.

Fusion MLS Settings

Fusion MLS Settings

Global settings enable you to set time-saving defaults and customize Fusion MLS to suit your business needs. You can access Fusion MLS settings from the **Settings** link at the top of the screen; move your cursor over the link to open the settings menu.

Contact Web Site Settings

Global settings control what information is displayed on all of your contact websites, including:.

- Your contact information
- Images, like your photo and company logo
- A link to your listing inventory
- Listing addresses
- A customized site title

Contact Information

 To specify the contact information that appears on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.
2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **My Contact Information** section, select the check boxes for the information you want to appear on your web sites.
4. Click **Save**.

Web Site Personal Photo

 To have your photo appear on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.
2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Images** section, select the **My Photo** check box.
4. Click **Save**.

Web Site Logo

 To have your company logo appear on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.
2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Images** section, select the **Company Logo** check box.
4. Click **Save**.

Link to Your Listings

 To include a “My Listings” link on your contact web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.
2. Select **Contact Website Settings** to open the Contact Website Settings screen.

3. From the **Additional Settings** section, select the **Show “View My Listings”** link.
4. Click **Save**.

Listing Addresses on the Web Site

 To enable listing address display and mapping on your web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.
2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Additional Settings** section, select the **Show Listing Addresses** check box.
4. Click **Save**.

Custom Web Site Title

□ To add a custom title for your web sites:

1. Move your cursor over the **Settings** menu in the top right-hand corner of the screen.
2. Select **Contact Website Settings** to open the Contact Website Settings screen.
3. From the **Additional Settings** section, type a title in the **Site Title** box.
4. Click **Save**.

E-mail Prefences

Your e-mail preferences are applied by default to all e-mails sent from Fusion MLS.

Your E-mail Address

□ To edit your primary e-mail address:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.
2. Select **Email Preferences** to open the e-mail preferences screen.
3. Make any desired changes to the **Primary email address** or **Pager/ Cellular email** settings.
4. Click the **Save** button.

Receiving Copies

□ To receive a copy of e-mails you send from Fusion MLS:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.
2. Select **Email Preferences** to open the e-mail preferences screen.
3. Select the **Send me a copy** check box.
4. Click the **Save** button.

E-mail Signature

□ To set your e-mail signature:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.
2. Select **Email Preferences** to open the e-mail preferences screen.
3. Compose your signature in the **Signature** box. You can format your signature with the text editor tools.
4. Click the **Save** button.

Auto-notification Defaults

You can specify default auto-notification settings that will be applied automatically to a prospect search when you create it.

□ To specify default auto-notification settings:

1. Move your cursor over the **Settings** link at the top of the screen to display the settings menu.

2. Select **Auto-Notification Defaults** to open the auto-notification default settings screen.
3. Edit the default settings as desired.
4. Click the **Save** button.