Fusion 3

CBR Fusion MLS
Level 3 - Customization and Advanced Features

Class Handout

The Contact Web Site

When you set up a saved search for a contact, you can choose to send the results in a link to an online report, or a *Contact Web Site*. This is a personalized web site where a contact can view the listings returned by all the searches you have set up for him or her. Your contact can mark listings that he or she is interested in (or not interested in). Contacts can even leave notes for you about listings on the web site. You can mark listings as recommendations. Your contact's saved listings (favorites, possibilities, rejects, and recommendations), as well as notes, are accessible from within Fusion MLS. You can view these, and all listings returned by a contact's searches, from the Search Manager and Contact Manager modules.

Global 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**.

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**.

Company 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**.

My Listings Link

□ 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

□ 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**.

Adding a Custom 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**.

Contact-Specific Web Site Settings

Some contact web site settings apply to individual contacts. You can access these settings from the contact manager's contact details panel.

Enabling and Disabling a Contact Web Site

□ To enable or disable a contact web site:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. Click the web site status indicator [(**ON/OFF**) to toggle the web site on and off.

Forcing a Contact to Accept the Terms of Use

□ To force a contact to accept the site's Terms of Use:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Contact Website Info** section, click **Edit Contact Website Info** to open the settings screen.
3. Select the **FORCE** check box in the **Terms of Use** section.
4. Click **Save**.

Setting a Personalized Greeting

To set a personalized greeting for a contact site:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Contact Website Info** section, click **Edit Contact Website Info** to open the settings screen.
3. Type a greeting in the **Contact Website Greeting** box.
4. Click **Save**.

Viewing Login Settings

The login settings tell you whether a contact is required to sign in to view his or her web site, and how many times he or she has viewed the site in the last 30 days.

To view a contact web site's login settings:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. From the **Contact Website Info** section, click **Edit Contact Website Info** to open the settings screen.

The login settings are displayed in the **Login Settings** section.

Viewing a Contact Web Site

You can access a contact web site from multiple points in Fusion MLS.

To view a contact web site from the contact manager:

From the contact manager list:

Click the icon in the contact web site [ ] column.

From the contact panel:

Click the **View Contact Website link**.

To view the contact web site from the search manager:

Click the icon in the web site [ ] column.

E-mailing a Link to a Contact Web Site

To e-mail a link to a contact web site:

1. From the contact manager, click a contact's first or last name to open the details panel.
2. Click the triangle next to the **Contact website info** section to open it.
3. Click **Email Link** to open a send e-mail screen.
4. Edit text as desired.
5. Click the **Send** button.

Managing Web Site Listings

When you enable auto-notification for a saved search, and have the results sent to a contact web site, you can review the listings on the web site from within Fusion MLS: both the contact manager and search manager provide access to a special search results page for each prospect search. This search results page enables you to

- Recommend listings
- Change a listing's designation (e.g., favorite, possibility, reject)
- Access the contact web site
- Enable or disable the contact web site

Recommending Listings

To recommend a listing on the contact web site:

1. From either the search manager or contact manager, open the results page for a prospect search.
2. Select the listing you want to recommend.

3. From the **Tools** menu, select **Recommended.**

Changing a Listing's Designation

 To change a web site listing's designation (favorite, reject, etc.):

1. From either the search manager or contact manager, open the results page for a prospect search.
2. Select the listings whose designation you want to change.
3. Select a new designation from the **Tools** menu.

Saved Listings

Saved listings are contact web site listings that you or the contact have flagged as recommended, favorite, possiblility, or reject. You can view and manage saved listings from the contact manager's details panel.

Adding and Editing Saved Listing Notes

 To add a note to a saved listing:

1. From the contact manager's details panel, open the **Saved properties info** section.
2. Click the icon in the **Notes** column to open the notes screen.

3. Click the **click here to edit text** button.
4. Click the **click here to add text** button.
5. Type a note in the lower box
6. Click **Save**.
7. Click **Close**.

 To edit a note to a saved listing:

1. From the contact manager's details panel, open the **Saved properties info** section.
2. Click the icon in the **Notes** column to open the notes screen.
3. Click the **click here to edit text** button.
4. Edit the text in the upper box
5. Click **Save**.
6. Click **Close**.

Changing a Saved Listing's Designation

 To change a saved listing's designation (favorite, reject, etc.):

1. From the contact manager's details panel, open the **Saved properties info** section.
2. Click the icon in the **Notes** column to open the notes screen.
3. Select a designation option.
4. Click **Save**.
5. Click **Close**.

Custom Grids

The Grid Manager

With the grid manager, you can create custom grids that display the columns you want to see, in the order you want them to appear. You can set default grids and specify the sort order for your custom grids.

Creating Grids

To create a new search results grid:

1. Click the grid manager icon [ ] to open the grid manager.

2. Click **Create New Grid** to open the grid editor.
3. Type a name for the grid in the **Grid Name** box.
4. Move the fields you want to appear in the grid from the **Available Fields** list to the **Included Fields** list.
   • Drag and drop fields between lists.
   • Click a field to select it, and use the move right [ ] and move left [ ] buttons to move it between lists.
   • Hold down the CTRL key while clicking fields to select multiple fields.
   • Hold down the Shift key to select a range of fields.
   • Type a field name (or part of a field name) in the **Search for field** box to narrow the list of available fields.
5. Arrange the included fields in the order you want them to appear.
   • Drag and drop fields
   • Click a field to select it, and use the move up [ ] and move down [ ] buttons to move it up or down.
6. If desired, you can modify the formatting for the included fields.
   6.1. Click a field to select it.

   6.2. Click the **Format Field** button to open the field formatter
   6.3. Modify the formatting as needed.
   6.4. Click **Save** to return to the grid editor.
7. Click **Save**.

Field Format Settings

A field's format settings determine how the field is displayed in the grid. Depending on the type of field, some settings may be disabled.

• **Column Header**: the text that appears at the top of the grid column.
• **Prefix**: text that precedes data displayed in the column. For example, if the prefix is "approximately" then all data in the grid column will be prefaced by the word "approximately."
• **Suffix**: text that follows data displayed in the column. For example, if the suffix is "or more" then all data in the grid column will be followed by the word "approximately."
• **Alignment**: text alignment in the column (left, middle, or right).
• **Field mask**: sets formatting for numeric fields. For example, selecting ####.00 results in numeric data being displayed to two decimal places. Selecting ##,###,### results in a comma being used to separate thousands groups in the large numbers.
• **Display Format**: used for listbox fields. Specifies whether short codes or full descriptions will be displayed.
• **Use this format for all fields in this grid**: used for listbox fields. If this check box is selected, the Display Format setting will be applied to all listbox fields in the grid.

• **Column width**: sets the width for the grid column.

Editing Grids

You can edit grids that you have created. Depending on your permission level, you may be able to edit other grids (for your office or firm) as well.

If you want to make changes to an office-, firm-, or system- level grid that you do not have permission to edit, make a copy of the grid and edit the copy.

□ To edit a grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid you want to edit, to select it.
3. Click the **Edit Grid** button to open the grid editor.
4. Make any desired changes to the grid name, included fields, or field formats.
5. Click **Save**.

Copying Grids

When you copy a grid, it cannot have the same name as the original.

□ To copy a grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid you want to copy, to select it.
3. Click **Copy Grid** to open the grid editor.
4. Type a new name in the **Grid Name** box, or accept the default.
5. Make any other desired changes.
6. Click **Save**.

Deleting Grids

You can delete any grid that you have created. Depending on your permission level, you may be able to delete other grids (for your office or firm) as well.

□ To delete a grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid you want to delete, to select it.
3. Click **Delete Grid**.
4. When prompted to confirm the deletion, click **Yes**.

Default Grids

The default grid is the grid that automatically loads when you open a page that uses a grid to display data, such as the search results page or the contact manager.

Your current default grid is indicated by a [ ] in the grid manager.

□ To set the default grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid you want to set as the default, to select it.
3. Click Set as **Default Grid**.

Grid Sort Order

You can set the sort order for grids that you have created. Depending on your permission level, you may be able to set the sort order for other grids (for your office or firm) as well.

You can sort on up to three columns.

□ To set the sort order for a grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid whose sort order you want to set, to select it.
3. Click **Set Sort Order** to open the sort order screen.
4. Select a column from the **Sort By** list.
5. Select **Ascending** or **Descending**.
6. Select additional sort fields from the **Then By** lists as needed, and set the sort direction for each.
7. Click **Save**.

Export Listing Data

Exporting Listings – Download to Spreadsheet

 To export listings from Results Grid from Fusion MLS:

1. If you only want to export certain property listings, select them before beginning the export process.
2. Select **Export Data** from the **Tools** menu at the top of the Grid to begin the export.
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. (If you have previously created a Custom Grid with the fields you wish to download, you can select it from the list.)
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**.

Custom Grids for Contact Manger

Custom Contact Display Grids

With the grid manager, you can create custom grids that display the columns you want to see, in the order you want them to appear. You can set default grids and specify the sort order for your custom grids.

Creating a Custom Contact Manager Grid

 To create a new search results grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click **Create New Grid** to open the grid editor.
3. Type a name for the grid in the **Grid Name** box.
4. Move the fields you want to appear in the grid from the **Available Fields** list to the **Included Fields** list.
• Drag and drop fields between lists.
• Click a field to select it, and use the move right [ ] and move left [ ] buttons to move it between lists.

• Hold down the CTRL key while clicking fields to select multiple fields.
• Hold down the Shift key to select a range of fields.
• Type a field name (or part of a field name) in the **Search for field** box to narrow the list of available fields.
5. Arrange the included fields in the order you want them to appear.
• Drag and drop fields
• Click a field to select it, and use the move up [ ] and move down [ ] buttons to move it up or down.
6. If desired, you can modify the formatting for the included fields.
6.1. Click a field to select it.
6.2. Click the **Format Field** button to open the field formatter
6.3. Modify the formatting as needed.
6.4. Click **Save** to return to the grid editor.
7. Click **Save**.

Copying a Contact Manager Grid

When you copy a grid, it cannot have the same name as the original.

To copy a grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid you want to copy, to select it.
3. Click **Copy Grid** to open the grid editor.
4. Type a new name in the **Grid Name** box, or accept the default.
5. Make any other desired changes.
6. Click **Save**.

Deleting a Custom Contact Manager Grid

You can delete any grid that you have created. Depending on your permission level, you may be able to delete other grids (for your office or firm) as well.

To delete a grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid you want to delete, to select it.
3. Click **Delete Grid**.
4. When prompted to confirm the deletion, click **Yes**.

Editing a Custom Contact Manager Grid

You can edit grids that you have created. Depending on your permission level, you may be able to edit other grids (for your office or firm) as well.
If you want to make changes to an office-, firm-, or system- level grid that you do not have permission to edit, make a copy of the grid and edit the copy.

To edit a grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid you want to edit, to select it.
3. Click the **Edit Grid** button to open the grid editor.
4. Make any desired changes to the grid name, included fields, or field formats.
5. Click **Save**.

Setting a Default Contact Manager Grid

The default grid is the grid that automatically loads when you open a page that uses a grid to display data, such as the search results page or the contact manager. Your current default grid is indicated by a [ ] in the grid manager.

To set the default grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid you want to set as the default, to select it.
3. Click Set as **Default Grid**.

Setting the Default Contact Grid Sort Order

You can set the sort order for grids that you have created. Depending on your permission level, you may be able to set the sort order for other grids (for your office or firm) as well.
You can sort on up to three columns.

To set the sort order for a grid:

1. Click the grid manager icon [ ] to open the grid manager.
2. Click the grid whose sort order you want to set, to select it.
3. Click **Set Sort Order** to open the sort order screen.
4. Select a column from the **Sort By** list.
5. Select **Ascending** or **Descending**.
6. Select additional sort fields from the **Then By** lists as needed, and set the sort direction for each.
7. Click **Save**.