



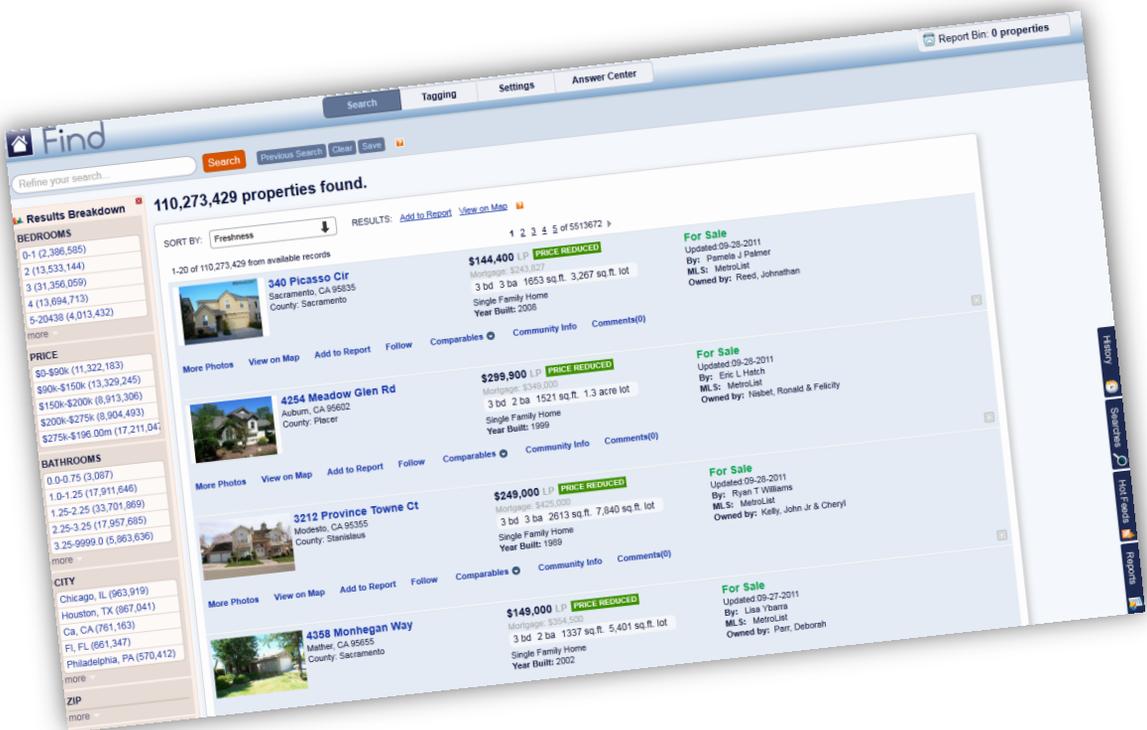
Quick Reference Guide



Provider 0011

TREC Approved Course 03-00-125-26370

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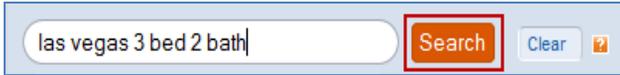
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With the Find text search, you can type one or more 'phrases' in a single entry to return a list of matching properties. This is called a 'phrase' since the search entry is much like an English language phrase.

Creating a Search

To create a search:

1. Type a **phrase** in the search field.



2. Press the **Enter** key on your keyboard or click the **'Search'** button.

A search is triggered and the results display. You are ready to refine the search.

Modifying a Search

Adding additional values:

- Type some text into the search text field, and press the **Enter** key or click **Search** to refresh the current search.



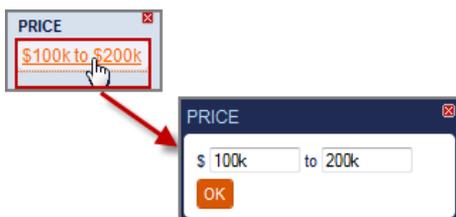
To change an existing value in the search:

1. In the list of search criteria you entered, **click** the value you wish to change.

A pop-up menu displays alternate options.

2. Select the substitute and click **'OK'**.

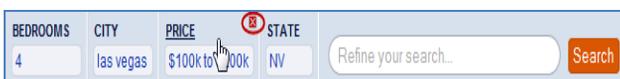
The format of the alternatives depends upon the category.



To remove a category from the search:

1. In the search criteria list, **hover** over the name of the category to remove.

An X displays beside the category.



2. Click the **'X'**.

The category is removed from the search criteria.

To switch a category:

1. Click the name of the category to change, for example **Price**.

A Switch Category dialog box appears, displaying the categories most likely to fit the value entered.



2. From the drop-down list, **select** the new category.

3. Click **OK**.

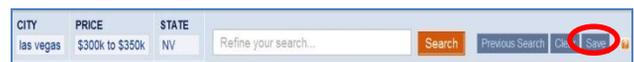
The switched category displays in the Search Panel.



Saving a Search

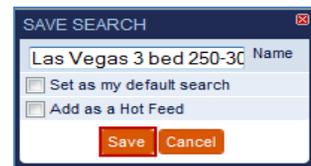
To save a search:

1. Create the **text** or **map** search.
2. Click the **Save** button next the search text field.



The Save Search dialog box displays.

3. Enter a **unique name** for your search.
4. (Optional) To make this search a **default** or **Hot Feed**, select the appropriate box.



5. Click **Save**.

An info pop-up displays.

6. Click **OK** to close the pop-up.

The search appears in the Searches sidebar.

To delete a search:

1. In the Searches list, **hover** over the search to be removed.

The Rename and Delete icons display.

2. Click the **Delete** icon.

A prompt displays to confirm the deletion.



3. Click **Yes** to confirm.

The search is deleted.

The **Results Breakdown** appears to the left of the Search Results Panel. It contains a default set of categories that are automatically included in every search breakdown and which display a summary of the number of properties matching your search. You can use the **Results Breakdown** to further filter your search results.

Using the Results Breakdown Panel

To add values from the Results Breakdown:

- In the appropriate Results Breakdown category, click the value to add.



That value is automatically added to your search.

To add a fresh category:

- In an empty category, click the **CLICK TO ADD MORE** link.

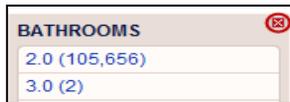


The Available Fields list displays.

- Select the **category** to add to the Results Breakdown. *The category, including the related criteria, is added to the Results Breakdown. (6 Categories max.)*

To remove a category:

- Click the **X** in the top right of the category to remove.



The category is replaced with the 'CLICK TO ADD MORE' link.

To change a category:

- Click the **X** in the top right to remove a category.
- Click the **CLICK TO ADD MORE** link.
- From the Available Fields list, **click** the desired category.

The new category displays in the Results Breakdown.

To hide the Results Breakdown panel:

- Click the Results Breakdown title once to hide the Panel; click it again to show.
Tip: You can also click the 'X' beside the Panel name to hide.



Viewing Property Matches

Individual property matches display in a list in the Property Search Results.

- Click a **black text** item to add that information to the search criteria.
- Click a **blue text** item for additional options for working with the property.



- Click the **Property photo or street address** to access the **Property Details** page.



The Property Details page displays the following information:

- Summary Information:** This is the same information that appears in the Property Search Results list.
- Public Data Tab:** Displays property details including location, features and values. Hover over items on this page to locate values that can be added to the search criteria or used to filter search results.
- Listings Tab:** Available when the property status is For Sale or Active, and contains detailed current listing information and agent information.
- History Tab:** Displays all known historical information. (When no history is available, a message to that point displays.)
- Photo Archive Tab:** A gallery of current and archived photos. Use arrows to move backward and forward through the photos. Hover over a photo to display a larger image.
- Community Info Tab:** Displays a report of the community characteristics for the zip code where the property is located.
- Comments Tab:** Enables you to view your saved comments or add a new one. These comments are currently private (i.e. only visible to you).

Every search can be displayed as a map of the geographical area being searched. You can search properties using a map, zoom in to a desired area, display layers for additional information, and create a 'My Neighborhood' to outline a specific area.

Viewing a Map

To access the map:

1. Click the **Map** sidebar tab.



Search results show as pins on the map.

- **Green** = for sale/active/pending/new construction
- **Red** = recently sold
- **Grey** = off market, withdrawn or expired
- **Plus sign** = multiple properties matching the search criteria in that location

Clicking a pin displays information for that property. If there are multiple properties for a pin, click **Next** to cycle through each property summary.



To zoom into a selected area:

- Place the cursor on the **Zoom**  icon at top right of the map, then press and hold the mouse button. *Map zooms in to closest birds eye range.*



To navigate the map:

- In any view, use the **circle and arrows** to navigate in any direction on the map or left-click and drag the map in the desired direction.

To access the zoom options on a map:

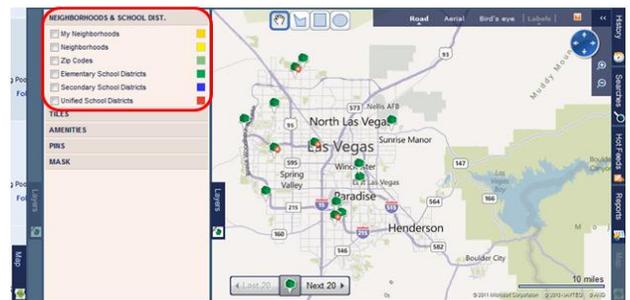
- On the map, **double-click** the area of interest. *The map will re-center and zoom where you click.*

Working with Layers

Layers overlay the basic map; applying a layer displays additional information such as neighborhoods or amenities.

To show or hide a layer:

1. On the left side of the map, click **Layer**. *The Layer sub-tab expands and the Layer Options menu displays.*



2. Click to select the **check boxes** beside the layers to display; clear the check boxes beside the layers to hide. *The map updates immediately, turning the appropriate layer off or on.*

The map updates immediately, turning the appropriate layer off or on.

3. Click the **Layer** sub-tab again to collapse the sub-tab and hide the Layer Options menu.

Layer Options

Available layer options are:

1. Neighborhoods

Displays city-assigned neighborhood labels. Click a label to see the boundaries of that neighborhood.

2. School Districts

Displays colour-coded options for Elementary (Green), Secondary (Blue) and United (Red) school districts.

3. Tiles

Displays local area information such as flight paths, hazards and hurricanes on the map. Beside each option you can click **legend** for an explanation of how that tile displays on the map.

4. Amenities

Displays any local amenities, such as banks, hospitals, and post offices, in the area. Once you select Amenities to display, they continue to show in your searches until you hide them again.

5. Masks

Masks enable you to hide, show or highlight the area of the map that includes the results.

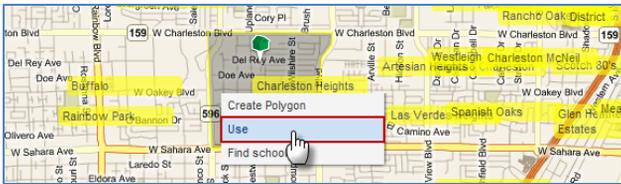


To use a Neighborhood in a search:

1. Click a Neighborhood **name** to display its boundaries.



2. Click the blue drop-down arrow on the Neighborhood label to display the **Action Options** menu.



3. Click **Use** to include the neighborhood in your search filter.

The neighborhood is added to the search criteria and matching results display on the Search Results page and on the map.



Defining your own Neighborhood

You can create your own neighborhood ('My Neighborhood') to use in a search or to show information on specific areas which do not follow regular neighborhood boundaries.

To create and save a neighborhood:

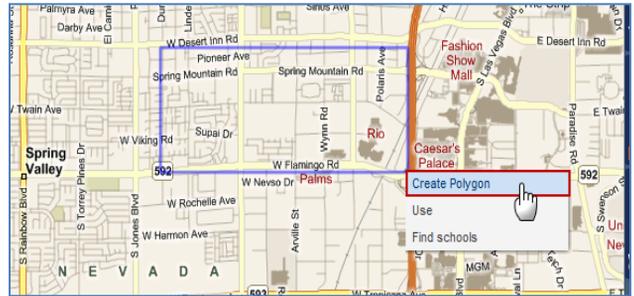
1. Start with a **text search** to narrow your area.
2. On the map, click **Road** or **Aerial** view.
3. Click a **drawing tool** to select your shape.



4. Click again on the map and draw your shape as follows:

- **Circle:** Click the point that will be the center of your circle, and drag outwards.
- **Polygon:** Click each point of the polygon. Click again on the first point to complete the shape. The first point turns dark to indicate that you have made the connection.
- **Rectangle:** Click the point that will form one of the corners and drag over the area to include the required area.

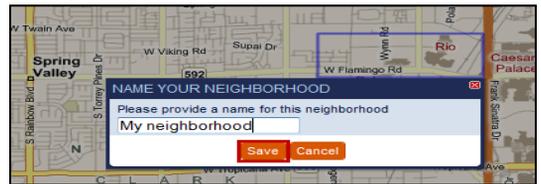
When you release the left mouse button, an options menu displays.



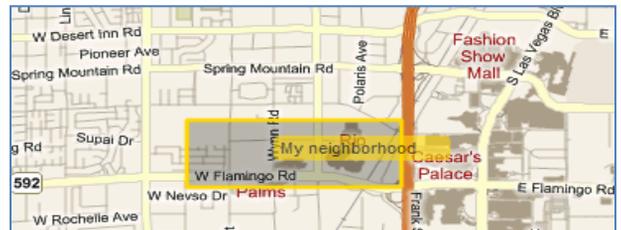
5. Select the desired option:

- **Create polygon:** to save the shape. (*Shown.*)
- **Use:** to use the shape boundaries in your search.
- **Find schools:** to display schools within the shape boundaries.

6. If prompted, enter a name for your neighborhood in the **Name Your Neighborhood** dialog box and click **Save**.



Your neighborhood is saved and a label displays your neighborhood name.



7. Click the blue drop-down arrow on the Neighborhood label to **access more options** like rename, remove, use, find community and find schools.

Tip: Click a neighborhood to display boundary points. You can click and drag to resize a saved neighborhood and to expand your search.

You can also combine neighborhoods you create, combine existing neighborhoods with your neighborhoods, and create a new neighborhood from overlapping ones.

These are just some of the many map features available. For more information on 'Working with Neighborhoods and Map Searches', please see the Online Help or the Find User's Guide.

Find offers both detailed and summary reports for presenting your search information. There is also a Community Report containing information about amenities in a specific area. Each Customer Report displays your branding at the top of each page. Reports can be renamed, saved, printed or emailed.

Creating a Report

There are two ways to create **Property Reports**. The first is a **Quick Report** for a single property.



To create a **Quick Report**, click the **Quick Report** link for the property and select the desired report type. This will open the **Report** module where you can **Save**, **PDF** and/or **Distribute** the report. (Proceed to the next page for details on these functions)

The second method of creating a **Property Report** allows you to gather multiple properties in the **Report Bin** to create a larger report for your clients. To use this method, use the following steps:
(These procedures should be done in the order shown.)

1. Collect properties for a report:

- Perform a **search** using the desired criteria.
- Select the **desired properties** by:
 - Clicking **Add to Report** at top of the search results list to add all properties on current page.

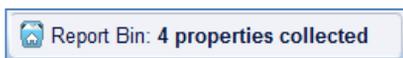


OR

- Hovering over an individual property and clicking **Add to Report** below the property information to add individual properties.



- When you are ready to create the report, click on the **Report Bin** at the top-right of the page..



The **Report Bin** opens to display a list of selected properties.



2. Remove or change property order & Driving Directions:

- ☞ To **reorder**, select a sort option from the **Sort By** list in the top-right corner
- ☞ For **Driving Directions** click button, top-left corner
- ☞ To **remove a single property**, click the **X** beside the property.
- ☞ To **remove all properties**, click **Remove All** at the top of the preview.

3. Preview the report:

- Open the **Report Bin** to display the selected properties.
- Click **Preview** on the top left of the page.



Find displays the default report (Customer Short) on a new tab.

- To **change** the report type, select the desired report type from the **Type** drop-down list.

To name, convert to PDF and/or save a report:

- Click the blue **Report Name** link at the top.

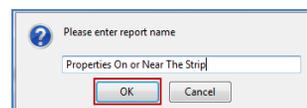


A text edit field displays.

- Enter a **new name** for the report.
- Click **OK** to save the name.



To **convert to PDF without saving**, click **PDF** at the top of the preview page.



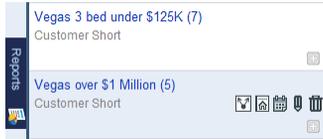
To save the report:

- Click **Save** at the top of the page.
- Enter a descriptive name and click **OK**.

Managing Reports

To access your saved Reports:

1. Click the **Reports** sidebar tab.
The Reports list appears.



To modify report information:

1. Hover your cursor over a report to display action icons.
 - ↳ **To change the expiry date**, click the icon and enter a new date.
 - ↳ **To Share a Report** click the icon and copy & paste the report link displayed.
 - ↳ **To rename a report**, click the icon and enter a descriptive name. Click **Save** when done.
 - ↳ **To delete a report**, click the icon and click **OK** to confirm.

To combine two or more reports:

1. Click the **Report** sidebar tab.
2. Click this icon for each report you wish to combine.
The properties are added to the current report.
3. When all report properties have been added to the **Report Bin**, open the **Report Bin** and proceed as needed.

To tag a report:

1. In the Reports list, **hover** over the report to tag.
2. Click the icon.
The Tag dialog box opens.
3. **Add** the tag information and click **Save**.

Distributing Reports

To distribute a report:

1. **Preview** the report.
2. At the top of the page, click **Share**.
The Share Report dialog box displays.



3. To share via webmail (i.e. Gmail, Yahoo Mail, AOL...etc.) or other online resource, copy the link displayed in the dialog box, click **Cancel**, paste the link in your desired location and distribute as you wish. ~ or ~
To share via a local email client such as Outlook, click **Send**.
The email opens for preview in your client email (e.g. Outlook), containing the information you entered, a subject, and some text that includes a link to the report
Make any changes or additions and send the email normally.

Report Type Examples

There are **7** different report types.



1. Map Summary Report:

This report maps all properties in your report bin in an easy-to-read format. Each page of the report contains agent branding and property maps.

2. Customer Short Report:

This report contains a list of properties selected to present to a customer with a summary of each property's basic information.

3. Agent Short Report:

The same as the Customer Short report, plus the agent's private remarks and listing information.

4. Customer Long Report:

Contains the same information as the short report, plus 3 additional sections (Features, Other, Public Remarks

5. Agent Long Report

The same as the Customer Long report, plus the agent's private remarks and listing information.

6. Consolidated Summary Report

Contains a list of selected listings with a list of average values of all the properties is displayed.

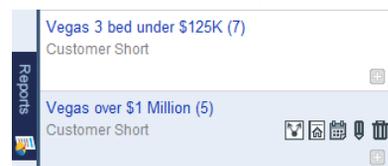
7. Community Report

Contains school and community information (restricted to 2 zip codes max).

Viewing Saved Reports

To view a saved report:

1. Display the **Reports** sidebar.
2. On the Reports list, click the **report name**.



The report opens on a new tab in your browser.



Find

Hot Feeds & Followed Properties

The **Hot Feeds** feature runs a selected search on *multiple* properties and reports any changes. The **Followed Properties** tool allows you to tag and track a *single* property for any changes since the last viewing.

About Hot Feeds

Hot Feeds runs a selected search on *multiple* properties and returns only those results with changes since the last viewing. This can include new properties or ones already included in the search results that have been updated.

Creating Hot Feeds

Hot Feeds are created using the Save Search command.

To save a search as a Hot Feed:

1. Create your **search**.

Tip: you can use either a text or a map search.

2. Click the **Save** button on the Search Panel.



3. In the Save Current Search dialog box, name the search and check **Add as a Hot Feed**.



A dialog box displays indicating the search has been saved as a Hot Feed.

4. Click **Ok** to close the dialog box

Accessing Hot Feeds

Your saved Hot Feeds display on the Hot Feeds sidebar tab.

To access your saved Hot Feeds:

1. Click the **Hot Feeds sidebar tab**.

The Hot Feeds list displays.

2. Click **All** to display the complete Hot Feed list.

- or -

Click **Updated** to show only those lists containing properties with updates since your last viewing.



Viewing Hot Feeds

To view the contents of a Hot Feed:

1. Show the **Hot Feeds sidebar tab**.
2. Select **All** or **Updated** as desired.
3. Click to **select** the Hot Feed to search by.



The Hot Feed including the Recent Activity Date becomes your search criteria.



4. (Optional) Click **View on Map** to see the location of the hot feed properties.

The map zooms in to the closest level that contains all matching properties marked with pins.

Managing Hot Feeds

When you move your cursor over a Hot Feed, four icons appear: a calendar (*change hot date*), a pencil (*rename*), a trash can (*delete*), and a plus sign (*tag*).



Click the icon to **change the hot date** of the feed.

Click the icon to **rename** the Hot Feed.

Click the icon to **delete** the Hot Feed.

Click the icon to **tag** the Hot Feed.

You can create a **Followed** tag on an individual property in order to follow its status. You can then search by Followed Properties or use the Tagging page to find them quickly and easily.

Applying a Followed Tag

To apply a Followed tag to a property:

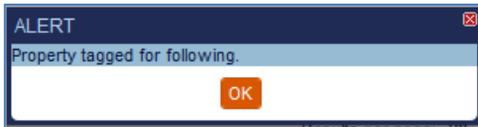
1. **Open** a search on the Property Search page.
2. In the Matching Property list, **hover** over the property to follow.

The Action links appear across the bottom of the match.



3. Click the **Follow** link.

A pop-up alert displays and a Followed tag displays on the right side of the page.



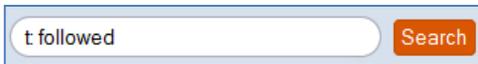
4. Click **OK** to close the Alert.

Tip: you can also click the Tag icon at the bottom right of the property match.

Viewing Followed Properties

You can view followed properties in one of two ways:

- In the Search Panel, enter the criteria **'t: followed'**.
This power shortcut searches for any properties tagged as 'followed'.



OR

1. From the main page, click the **Tagging** tab to view all tagged properties.



2. Click the **address** of the followed property to display the Property Details Page.



Removing a Followed Tag

You can remove a Followed tag using the Property Match list or the Tagged list.

To remove a Followed tag using the Property Match list:

1. In the Search Panel, enter the criteria **'t: followed'**.

This power shortcut searches for any properties tagged as 'followed'.



2. Click the **Tag** icon at the right of the property panel.

The Manage Tags dialog displays.

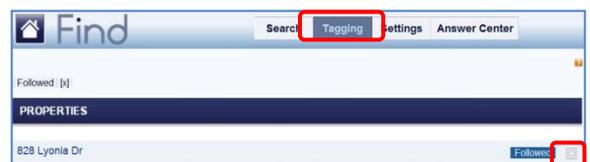


3. Uncheck the **Followed** box to clear the tag and click **Save**.

The Followed tag is removed from the property and from the tagged list.

To remove a Followed tag using the Tagged list:

1. From the main page, click the **Tagging** tab to view all tagged properties.
2. Click the **Tag** icon beside the property to remove.
The Add Tags dialog displays.
3. Clear the **Followed** tag and click **Save**.





Power shortcuts and keywords are used to help clarify and refine your searches and to avoid possible ambiguity.

Keyword Table

To apply a keyword to your search:

1. Type **k:** and then the **keyword** into the text search field.

For example 'k:pool' searches for only those matches have a swimming pool.

2. Press **ENTER** or click **Search**.

air conditioning	club house	garage	pool
alarm system	concierge	hardwood floor	public transportation
appliances	custom tile	high speed internet	satellite tv
balcony	corner	lake, lakeview	spa tub
beach	dishwasher	laundry	sprinkler
business center	elevator	log home	stainless
cable	fireplace	marble floors	tile counters
ceiling fan	garage	mountain, mountain view	view
covered front deck	golf community, golf club	ocean views	water view
covered parking	granite	park	waterfront
cable	guest house	patio	yard

Power Shortcut Table

To apply a power shortcut:

1. Type the shortcut into the text search field.

For example 'ps: foreclosure' searches for only those records with a property status of 'foreclosure'.

2. Press **ENTER** or click **Search**.

Shortcut	For	Shortcut	For	Shortcut	For
a:	address	mp:	mortgage price	sch:	school
ag:	selling agent	myn:	my neighborhood	schd:	school district
apn:	APN id	n:	neighborhood	sd:	sold date
c:	city	o:	owner name	s:	state
ct:	county	ps:	property status	t:	tag
k:	keyword	pt:	property type	z:	zip
ld:	list date	rp:	rent price	zn:	zoning
m:	MLS Name	s:	state	ohd:	open house date
mn:	MLS property number — only returns properties with a "For Sale" status	sbd:	subdivision		