

SMART 

**ALL
ACCESS**

**GUIDE TO
SUCCESS**

connectMLSTM

EVOLVE YOUR BUSINESS.

SMART 

P: 203-750-6000

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ABOUT CONNECT MLS

This fully customizable MLS solution uses responsive design, intuitive widgets, endless power searches, functional client management, and much more.



WHY THE CHANGE?

As the industry changes, SmartMLS is committed to evolving with it and providing the foundation required to keep you at the forefront. Part of that evolution is delivering a comprehensive MLS solution that supports our entire real estate community - brokers, agents, appraisers, support staff, buyers and sellers.

That solution is connectMLS.

Built upon an innovative and highly flexible mobile-responsive design, connectMLS allows you to tailor the MLS system to support your personal workflow and efficiently service your clients.

This packet contains information on getting started, as well as several guides to help you get acclimated to connectMLS's most essential features.

Power Searches

Customizable CMA

Client Web Portal

Listing Maintenance

Lead Generation

Mapping Tools

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FEATURES IN CONNECTMLS

Here is a full list of features available for you to use. All of these features can be found directly on the connectMLS Home page and platform.

My MLS Home Page

- Customizable Widgets
- Shortcuts to Key Functions
- Market Activity Snapshot
- Board/MLS Messages
- Previous Searches
- Client Activity Communication Feature
- Incoming Leads
- Real-time Keyword Searches via SmartBar
- Multi-tasking Windows/ New Workspace

Mobile Access

- Readily Available Mobile App
- Layout Adjusts Automatically for User-Friendly experience
- Seamlessly Switch Between Devices with Ease

Property Searches

- Count-on-the-Fly
- Customizable per Agent
- Save/Load Default/Last Searches
- Advanced Search Options
- Saved Search Templates (Manual and Automatic)
- Hotsheets

Listing Reports/ Search Results

- Responsive Client and Agent Reports
- Customizable One-Line Grids
- Table Views
- Export Listing Data
- Download Listing Reports to PDF

Interactive Mapping Tools

- Responsive Map Search (i.e. Rectangle, Polygon, Multiple Shapes, Search While Moving Map)
- Birds Eye, Aerial and Road Views
- Driving Directions/Routing
- Parcel Lines
- School Boundaries

Listing Input

- Responsive Fields
- Easily Integrate Data from Current Tax Records
- Viewing Restrictions for Documents

Real Estate Financial Tools

- Payment Calculator
- Early Payoff Tax Savings
- Buy vs. Rent Calculator
- Closing Cost Estimator
- Seller's Net Proceeds
- Email, Save, Print

Prospecting (Automatic) Searches

- Various Search Frequency Settings Included in Real Time
- Notify Client Search
- Monitor Client Viewing Status
- Reverse Prospecting

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FEATURES IN CONNECTMLS

Here is a full list of features available for you to use. All of these features can be found directly on the connectMLS Home page and platform.

Statistical Reports

- Area Market Survey
- Market Statistics Report
- Market Conditions Addendum
- Graphs/Charts
- Agent Production Detail Report
- Roster Searches
- Company Inventory

Property Flyers

- Area Market Survey
- Market Statistics Report
- Market Conditions Addendum
- Graphs/Charts

Public Records/ Tax Data

- Integrates with SmartTax

Comparative Market Analysis (CMA)

- Buyer & Seller CMA
- Fully Customizable (Cover Letter, Resume, Subject Property, Comparable, Reports, Statistical Reports)
- Quick CMA with Statistics
- Print, Save, Email, Export as PDF

Email Capabilities

- Listings, Hotsheets, CMA, Forms, Financial Worksheets, Messages, Templates.
- Screener Abilities
- One-Time Email Capabilities
- Activate Auto-Emails

Client Portal

- Secure Client Portal Created Upon Adding a Client to connectMLS
- Branded with Agent's Info, Logo, and Picture.
- View Property Listings, CMA, Forms, Financial Reports, Messages, Flyers, Service Partners, Monitor Transactions, ect.
- Client Interest on Property Listings Automatically Populates in Agent's Account.
- Timestamped Communication Feed Between Agents & Clients Available to Both Parties.
- View Associated Documents
- View Additional Links (i.e. My Listings, My Website, My Resume, Calculator, etc.)

Robust Team Capabilities

- Shared Account Access with Data Sharing
- Permission Controlled by Lead
- Team Branding

Open House/ Tour Management

- Search Open Houses and Tours
- Schedule a Showing

Social/ Business Networking Tools

- Clients can Refer Agents to Friends
- Clients can Contact Agent-Referred Service Partners
- Service Partners can contact Agent-Referred Clients

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TERMINOLOGY IN CONNECTMLS

We have created this list to help you adjust to the new connectMLS system by providing the Matrix equivalent for terms you will find throughout connectMLS.

MATRIX	CONNECT
SpeedBar	SmartBar
News & Alerts (Widget)	Bulletins (Widget)
Listing Carts	My Favorites
Search Criteria	Filter
Single Line Display	List View
Contact	Client
Market Watch (Widget)	Market Activity (Widget)
Agent/ Client Full Display	Detail Report/ Full Detail
Public Remarks Field	Overview Field
Ranking Report	Market Share Report
Combined Saved Searches/ Auto Email (Widget)	Automatic Searches (Widget)
Refine > Narrow (In Search Results)	Show > Selected (In Search Results)
Refine > Discard (In Search Results)	Show > Unselected (In Search Results)
Concierge	Screeener
Incomplete Listings	Draft Listings

BRANDING MY CONNECTMLS

Making connectMLS your own is now easier than ever. In this section, we review a checklist to successfully setting up your business card and personal settings, thus optimizing how your business flows from day to day.

GENERAL INFORMATION

Personalize connectMLS by adding the following to your business card, which is viewable by other connectMLS users. Click on your initials in the top right corner, and select settings. This is where you can edit the following:

- Phone Numbers (Office & Personal)
- Email Address
- Social Media Links
- Personal Website Address
- Office Address
- Resume/Bio
- Headshot/ Photo

EMAIL TEMPLATES

You have worked hard to establish your brand and set up your profile. Now let's set up your email templates and defaults. At a minimum, SmartMLS recommends going through the most frequently used email templates:

1. Initial Notification
2. New/Changed Listings Notification
3. General Message
4. Manual Email

MANAGE & MODIFY

Now that you have your basics set up, we are going to modify and select categories that need development to ensure seamless operations in the future.

1. My Clients - Make sure that all of your clients are set up in connectMLS. Any client that exists currently in Matrix will be in connectMLS.
2. Prospecting Manager - Automatically sends listings to clients in real time.
3. My Favorites - Create folders and manage favored listings.

CREATE & DESIGN

Put the new settings to the test. Here's how to ensure your content is ready for clients to see.

1. Create a person with your personal email
2. Send the above templates to yourself, so you can be sure exactly how it will appear for your clients.

Need more information? Scan the QR code below to access the branding guide.



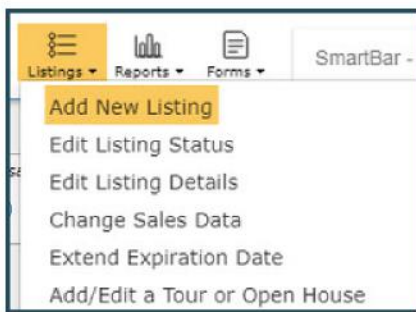
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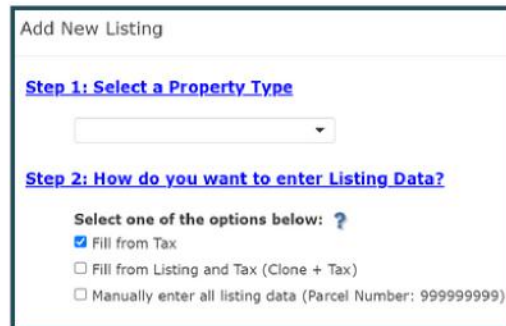
ADDING A LISTING IN CONNECTMLS

Looking to add a listing in connectMLS? This quick step-by-step guide will get you started with everything you need to know.

1.) Go to the Listings menu in the upper left corner and click **Add New Listing**:



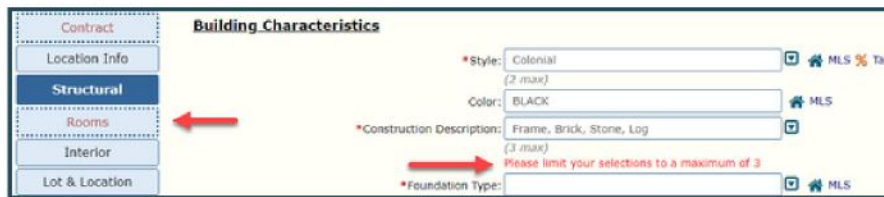
2.) You will then encounter the Add New Listing screen. Fill out pertinent information, then **Click Next**:



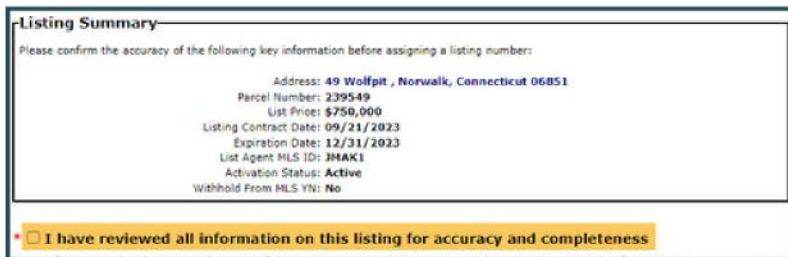
3.) Use the “Activation Status” field to select the status. After you have filled in all of the required fields on this screen, click the **Save Draft & Continue** button in the upper right:



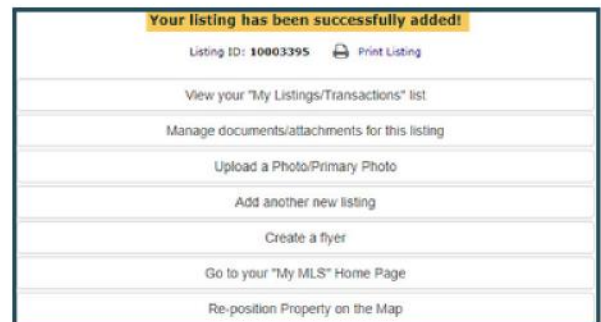
4.) Click into the desired section on the left to input data. As you move from one tab to another, your Draft listing will automatically be saved for you. Data input will highlight if you have missed any required fields in red.



5.) Click the “Validate & Publish” button in the upper right. If it finds any problems you will get a summary report. When there are no Errors, you will get this screen.



6.) Click the “Publish Listing” button in the upper right corner. Your listing is now live on connectMLS!



Scan the QR code for more information about adding a listing in connectMLS.

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MANAGING SUPPLEMENTS IN CONNECTMLS

Uploading your listing agreement is crucial, as a new listing cannot be activated until it is completed. Fortunately, connectMLS has an integrated document management system to make the process easier. Here is a brief guide to help you add and manage documents for your listing.

Step 1 - Choose Your Document

Each document you upload to your listing, can now be up to 20MG per attachment.

Step 2 - Select the Document's Type

The top portion of the document list is comprised of public-facing documents. The bottom section is where private documents, or Transaction Documents, are located.

The Document Name field will automatically populate with the same name. You can override this and enter a document name of your choice.

Step 3 - Choose Viewing Restrictions

Regardless of the document you are uploading to your listing, you have full control over the viewing restriction settings.

Step 4 - Add Additional Documents

Once you have added your document, you are brought back to the below screen where you can add another document, continue editing your listing, or close out of the listing completely. There is no limit to the number of documents you can upload to a listing.



Scan the QR code for more information about adding a listing in connectMLS.

SMART MLS

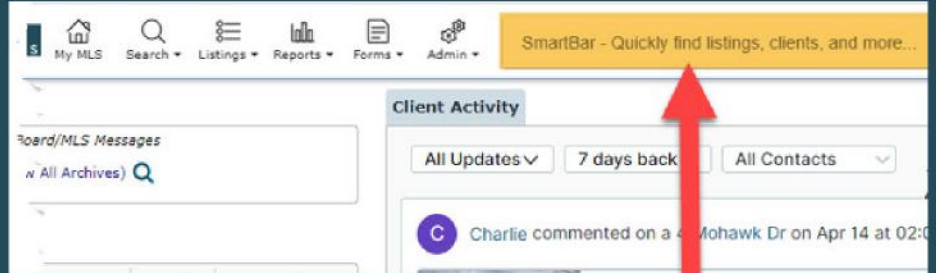
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SMARTBAR FUNCTIONS AND USES

The Smartbar has capabilities to search multiple groups and uses algorithms similar to google to predict what you need as you type. By utilizing the below shortcuts, you can find what you need faster & more efficiently.



SHORTCUTS FOR KEYWORD SEARCH

KEYWORD	SHORTCUT	EXAMPLE
ADDRESS	Just type Address	155 Main Street
MLS NUMBER	Just type MLS Number(s)	170366586, 170452378
PROPERTY	CITY - TYPE DESIRED CITY W/ COMMAS FOR MULTIPLE CITIES. PRICE - TYPE "\$" AMOUNTS - TYPE "+" OR "-" RANGE - TYPE "X-Y"	City Hartford, Avon \$200 - \$400 4+ beds 2+ baths
AGENT	TYPE " ag "	ag Johnson or ag Jack Johnson
OFFICE	TYPE " of "	of Realty Partners
Client Name	TYPE "cl"	cl Shane Smith

CUSTOMIZING A SEARCH IN CONNECTMLS

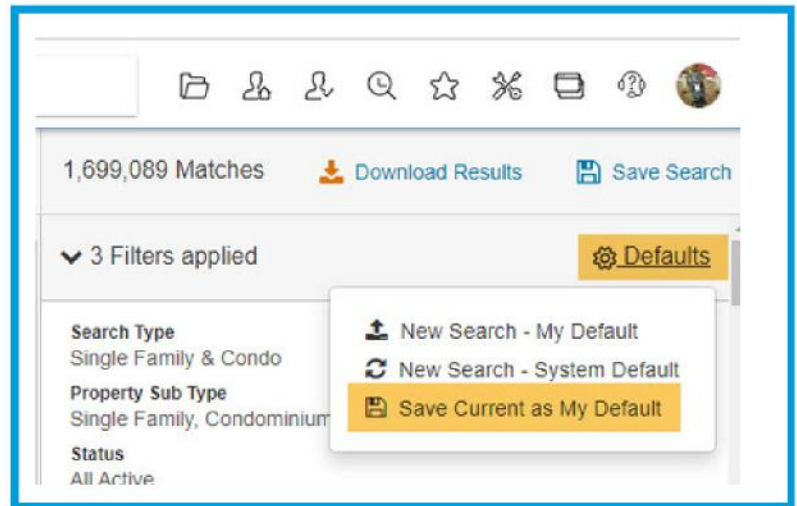
Endless possibilities await for customization within connectMLS. This section will review how to customize your searches in connectMLS, and how to modify the search page for custom automatic searches.

SEARCH EXPERIENCE

You can adjust the connectMLS search screens and reports so that they are optimized for how you use the MLS. Get more out of your connectMLS experience by customizing it to your personal work habits.

- Open Search Screen
- Add/Remove Fields
- Save Changes
- To save the changes, click "Defaults" and then click "Save Current as My Default"

The next time you open up the same type of search, all of the customizations you just made will appear.

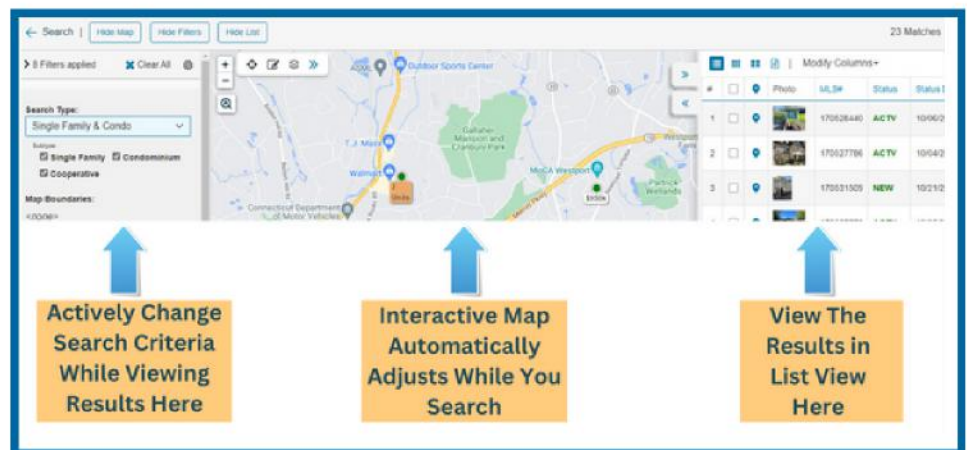


SEARCH RESULTS

The listings will display in a single line report, known as the List View. In the top left corner, click on the "Show Filters" button to add your search screen to the left side of the screen.

You can have any combination of the three sections (search fields, listings and map) on the screen simultaneously.

While on the list view, you can customize the fields and order that work best for you. Click "Modify Columns" on the upper left corner of the report.



VIEWING A LISTING IN CONNECTMLS

This section will review how to find the various pieces of a listing report, and how to access vital information such as disclosures, property history, tax data, and more.

LISTING VIEW

- Once you open a listing, additional report types are available at anytime from the drop-down menu. This includes Full Detail, Client Full-Detail, Agent Full - No Suppression, and more.
- When viewing a listing, the tabs located under the property address will bring you to the designated section, such as property features, rooms, utilities and more.
- By Selecting the "Pin" button in the upper right corner, you can pin the additional information to the screen, and browse listings.
- You can send listing information with one click-text a full listing with disclosures to your clients using the "share" button. You can also post to Facebook, send via email, or more.
- By selecting the "star" icon located above the "pin" button, you can easily save the listing to a favorites folder, which was previously carts in Matrix.

Listing Report Review


Listing Toolbar -

Click Each Section to Access Information, Such as Features and Rooms.

Full Detail ▾
<< Prev 14/46 Next >>
Additional Info

210 West Hyerdale Dr., Goshen, Connecticut 06756 Client-Friendly \$789,000

Overview
Property
Rooms
Features
HOA
Utilities
Listing
Agent/Broker
History



View 40

Recent: 05/22/2023: NEW

Active 5 Beds 5/0 Baths 5,597 SqFt Built 1981

Single Family For Sale DOM / CDOM: 0 / 0

Listing ID: 170564564 County: Litchfield

Parcel ID: 2057123 Neighborhood: Woodridge Lake

General Information: Planned Unit Development Subdivision:

Additional Info-

View Disclosures, Schedule a Showing, Print/Share Listing, Get Directions, and See Tax Data via SmartTax.

Photos -

See All Photos by Clicking Here

Access General Listing

Information Here

FEATURE HIGHLIGHT

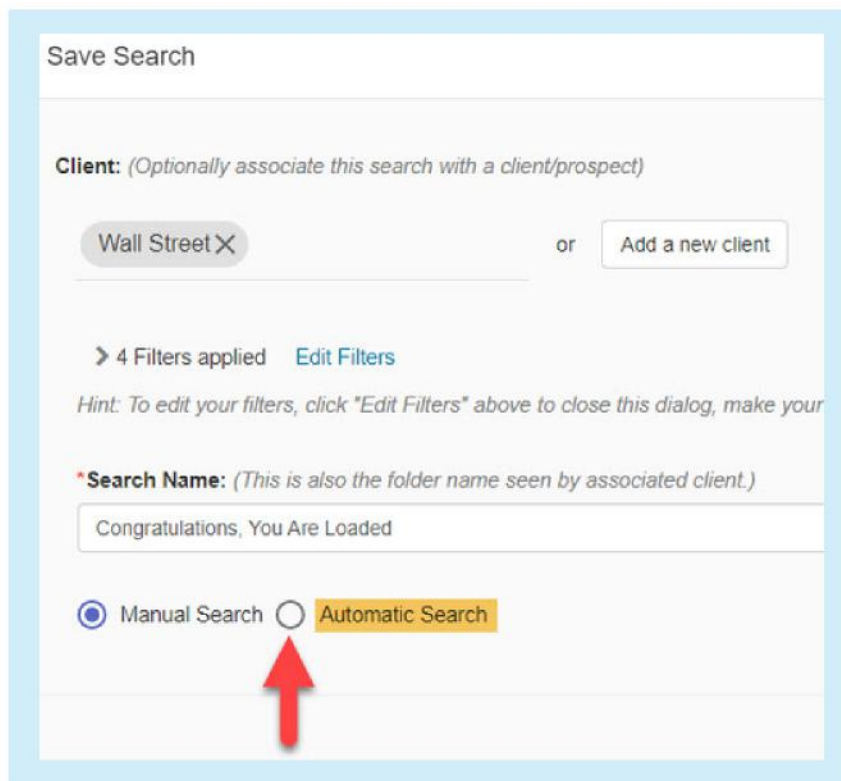
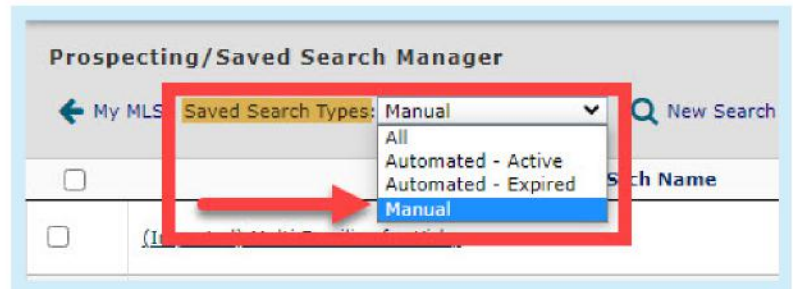
SETTING UP AUTO-EMAILS

Find information on how to activate imported saved searches, and get your clients set up with automatic emails from connectMLS.

How to activate imported auto-emails in connectMLS:

1. Activate the auto-email feature using the below steps:
 - a. Click the **Prospecting Manager** icon.
 - b. Select "Manual" under Saved Search Types (pictured).
 - c. Auto Emails that have been imported from Matrix will have the text **** IMPORTED: AUTOEMAIL DISABLED **** after their name.
 - d. Locate the pencil icon on the far right screen.
 - e. When the Save Search window appears, go to the bottom and select **Automatic Search**.
2. Monitor the client's engagement with auto-emails in connect to ensure engagement.
3. Deactivate auto-emails in Matrix to prevent duplicate emails going to your clients.

Scan the QR code for more information about how to activate Auto-Emails from Matrix in connectMLS



FEATURE HIGHLIGHT

SCREENER

Screeener allows you to filter search results before sending to a client when conducting automatic searches.

How to activate screener abilities in connectMLS:

1. Open the search screen, and select a previous search, or run a new search.
2. Save your search, and select the option for "Automatic Search".
3. Select your preferred settings for your automatic search, such as client, search name, and frequency of searches.
4. Select "Screen search results before sending to client", located under "Listing Notifications". Additionally, you may select to get a Bcc email copy. Save the preferred settings.
5. Access the new auto-email campaign right from the "Saved Searches" widget, located on the home screen.
6. Screener will show you the properties ready for your review, and allow you to approve & send or reject listings.

*Search Name: (This is also the folder name seen by associated client.)

Jessica R Buyer Search

Manual Search Automatic Search

Run search every: 1 Day(s) Week(s) Real-time (as listings appear)

Expires on 9/2/2023 (180 days max)

Send me a message 4 days before this search expires.

Listing Notifications

Send notification to the client when the search runs.

Screen search results before sending to client

Send me a notification when the search runs ("Bcc").

Delete this search when it expires.

Saved Searches

Screening	Automatic	Manual
Description	To Do	Last Ran
Screened auto email	22	Real-time

Scan the QR code for more information about screener in connectMLS



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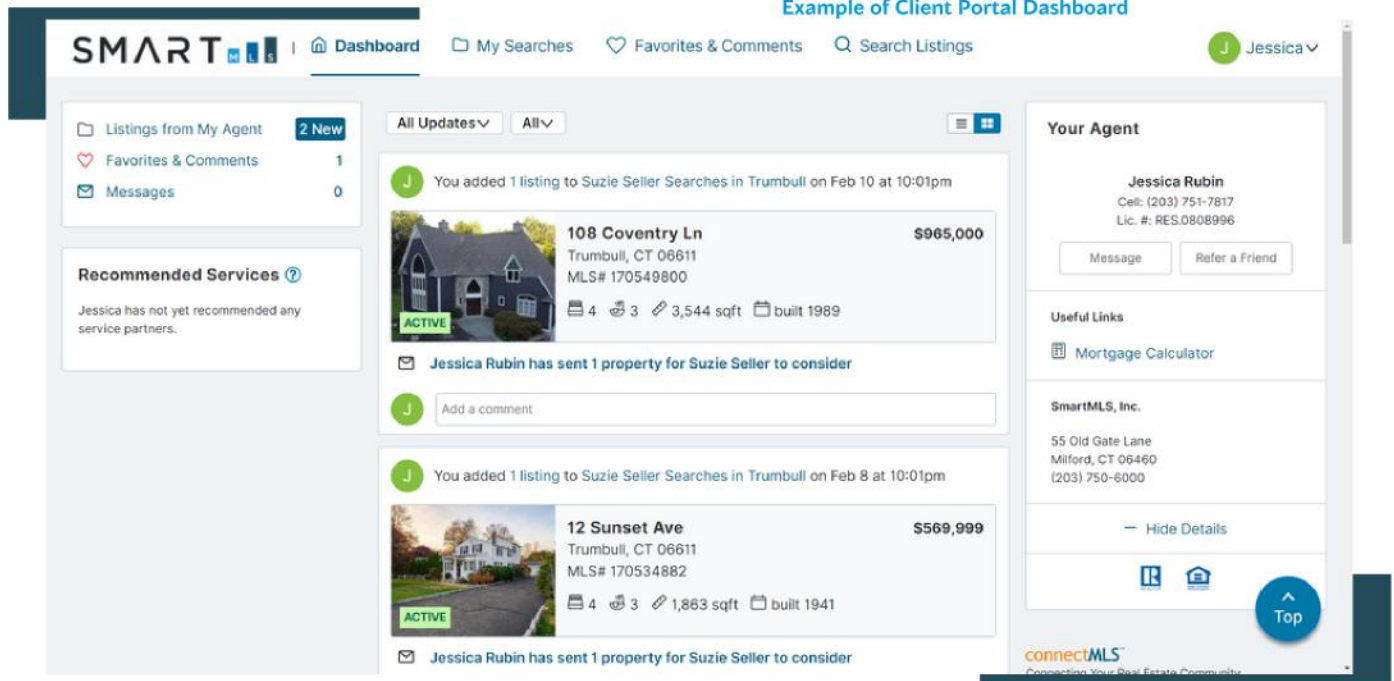
CLIENT PORTAL

The client portal is a professionally branded, secure site that you and your client can use throughout your partnership for easy, seamless communication and collaboration. When you add a customer as a client in connectMLS, the system automatically creates them their own personal web page, called a Portal.

The Client Portal Includes the Following:

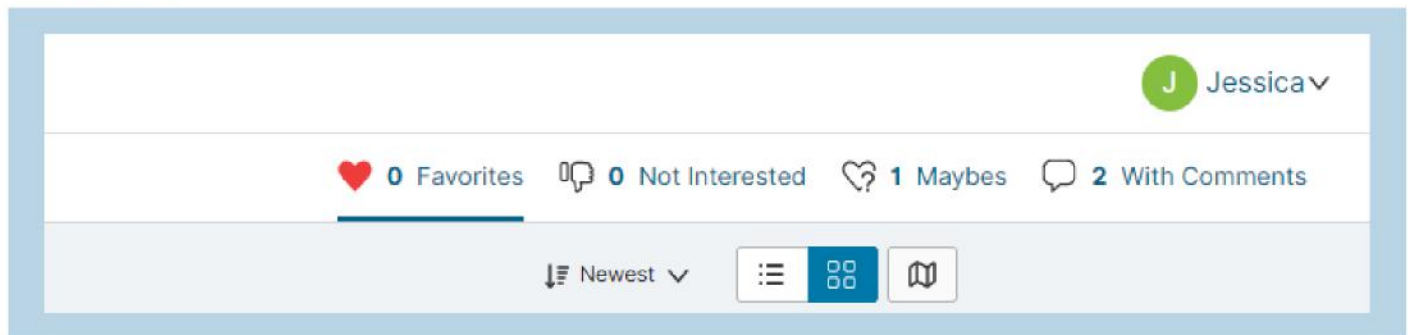
- Professionally branded material
- One-stop shop for all interactions - CMAs, reports, listings, documents, etc.
- Client flexibility to search for anything.

Example of Client Portal Dashboard



Clients have more opportunities than ever in the new client portal.

Here, clients can show you which listings they favorited, which properties are a possibility, and the properties that they are not interested in. Your client can also leave you comments, making client communications much more streamlined. You will receive an email notification with that information in real time.



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SMARTMLS TAX



We are thrilled to introduce you to SmartMLS Tax, our new home for extensive public records data and prospecting capabilities. Access SmartMLS Tax directly from the SmartMLS Membership Dashboard by clicking the SmartMLSTax tile, shown here.

LOCATION

Property Address: 57 Inca Dr, Trumbull, CT 06611-5528

HOA: [Blank]

HOA Fees: [Blank]

County: Fairfield County, CT

PROPERTY SUMMARY

Property Type: Residential

Land Use: 101.1-Family Residence

Improvement Type: 1-Fam Res

Living Area Sq. Ft.: 2640

GENERAL PARCEL INFORMATION

Parcel ID/Tax ID: 396571

APN: 144 M G-07 L 00039 U 000

2020 Census Tract/Blk: 907/3

Assessor Roll Year: 2022

CURRENT OWNER

Name: Ruben Howard G Rubin Sophie E

Mailing Address: 57 Inca Dr, Trumbull, CT 06611-5528

Owner Occupied: Yes

SCHOOL ZONE INFORMATION

Daniels Farm Elementary School: 0.9 mi Distance

Elementary Pre K to 5: [Blank] Distance

Hillcrest Middle School: 0.4 mi Distance

Middle 6 to 8: [Blank] Distance

Trumbull High School: 0.7 mi Distance

High 9 to 12: [Blank] Distance

SALES HISTORY THROUGH 12/02/2022

Date	Amount	Buyer/Owners	Seller	Instrument	No. Parcels	Book/Page Or Document#
9/26/1997	\$285,000	Rubin Howard G And Rubin Sophie Clifford	Stephen And Clifford Patricia A	Warranty Deed	2	936/609

TAX ASSESSMENT

Tax Assessment	2022	Change (%)	2021	Change (%)	2020

The SmartMLS Tax system is a user-friendly, highly customizable public records system that brings various pieces of public records information together into one dynamic program.

In addition to delivering robust public tax record information for all 169 Connecticut municipalities, the SmartMLS Tax system provides a simple yet powerful interface for farming for prospects.

The Prospecting search screen provides 17 useful search filters that allow you to be very granular with your search and target leads with precision.

Search for leads based on:

- Property Characteristics: property type, land use, search by map, etc.
- Ownership information: absentee (in or out of state), owner-occupied, duration, mortgage age, etc.
- Sale information: last sales date, last sales price, cash buyer, remove recent sales, etc.

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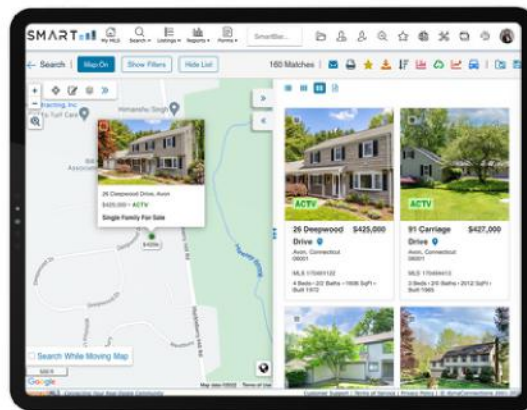
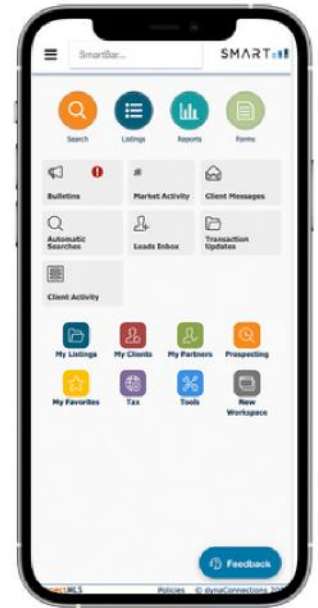
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MOBILE APPLICATION

This fully customizable MLS solution uses responsive design, intuitive widgets, endless power searches, functional client management, and much more. Download the App today!

- The underlying responsive technology used by the **connectMLS** application means that the functionality experienced via a browser on a PC/MAC, provides the **exact same experience** when accessing via a tablet or smartphone.
- Our long-standing adherence to HTML standards, avoidance of browser plug-ins, and attention to cross-browsers and cross-platform compatibility make this possible.
- When moving to a tablet setting, it will move to a two column set up instead of three. You are not losing any functionality.
- When moving to a phone or app setting, the widgets will display as buttons that you can tap with your finger.
- The mobile application can be accessible through a web browser, or on the App.



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ONLINE TRAINING DATABASE

Scan the QR code to view the below webinars and obtain further resources, such as a starter guide. The below list of pre-recorded videos can be of assistance during this upgrade.



AVAILABLE VIDEO TUTORIALS

ConnectMLS Overview Webinar

- ConnectMLS - Getting Started Webinar
- ConnectMLS - Search Webinar
- ConnectMLS - Listings Webinar
- ConnectMLS - CMA Webinar

Property Search

- Overview
- Search Filters
- List View
- Map View
- Creating and Managing Manual Saved Searches
- Creating and Managing Automatic Prospecting Saved Searches
- Creating and Managing Manual Saved Searches
- Creating and Managing Automatic/ Prospecting Saved Searches
- Search Notification Templates
- Creating and Loading Default Searches
- Accessing Prior Searches
- Adding Listing to "My Favorites"

Getting Started

- ConnectMLS Overview
- Help Resources
- Home Page Widgets
- Mobile Device Access Overview
- SmartBAR
- Adding Clients
- Display Settings
- Personal Settings and Defaults
- New Workspace
- Creating Default Sorts

CMA

- CMA Overview
- Area Statistics
- Emailing a CMA to Your Clients
- Subject Property
- Customizing Your CMA
- New Proceeds

Additional Reports

- Area Market Survey
- Creating and Managing Property Flyers
- Creating Custom Reports- Search Results
- Creating Custom Reports for Clients
- Creating Custom Reports- Advanced Settings

Buyer and Seller Access to ConnectMLS

- Client Access Overview
- Lead Capture
- Referring Service Partners
- Viewing Client Activity

Financial Worksheets

- Buyer's Closing Costs
- Seller's Net Proceeds



NEED HELP WITH SOMETHING ELSE?

Access our 24/7 self- service SmartDesk for answers to common questions. You can also utilize our chat feature located on the bottom right corner of the SmartDesk screen for help.

Contact SmartMLS with assistance on Compliance, Technical Support, or Membership Questions:

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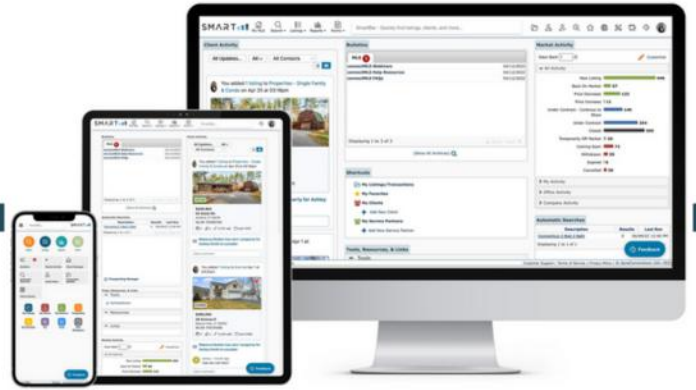
Hours of Operation:
Monday - Thursday 8:30am-7:00pm
Friday – 8:30am – 6:00pm
Weekends – 9am – 3:00pm



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NOTES & COMMENTS



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