ROAM FLEXMLS

Tools to help get you set up quickly and efficiently.



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ROAM Flexmls Quick Start Guide for NOMAR/GSREIN

Welcome to **ROAM Flexmls**, the unified MLS platform for ROAM members. This guide is designed to help you get started with the basic tools and features you will use most often, including searching, contacts, Saved Searches, Subscriptions, reports, CMAs, and listing input.

SUPPORT

NOMAR/GSREIN	**Flexmls Support**	**IDX/Licensing Issues**
Monday - Friday	Monday – Friday	FBS API Support
8:30 AM - 5 PM	8 AM – 9 PM	
(504) 885-3200	1-888-525-4747	api-support@fbsdata.com
mls@nomar.org	support@flexmls.com	

1. LOG IN TO FLEXMLS

Go to **roam.flexmls.com**.
Use the same username you currently use to log in to Matrix but add **roam.** before your username.
Example:
If your Matrix username is **438001234**, your Flexmls username would be:
roam.438001234
Enter your password and click **Log In**.

IMPORTANT: Flexmls login information is **case-sensitive**, so enter your username and password exactly as provided.
Tip: Bookmark **roam.flexmls.com** for quick access.

2. PERSONAL/MARKETING INFORMATION

Some of your member information is provided to Flexmls through the Association's membership system. This information may appear in listings and other MLS records. If information that is controlled by the Association is incorrect or cannot be edited in Flexmls, contact NOMAR to have it updated.

Flexmls also includes personal profile information that is used throughout the system for reports, flyers, business cards, emails, and your client portal. Your profile can include your preferred name, phone numbers, email addresses, website, professional designations, biography, agent photo, and brokerage logo.

To Do: Before you begin using Flexmls with clients, review and complete your personal profile information. Keeping your profile complete and up to date will help ensure your contact information and branding display correctly throughout Flexmls.

A. SET UP MY INFORMATION

To Do: Personal Information – Your personal information is used throughout Flexmls, including listing reports, flyers, emails, email signatures, and the client portal.

- Click **Menu** in the upper-left corner of Flexmls.
- Under **Preferences,** select **My Profile**.
- Select **Quick Profile Maintenance.**
- Review your contact information, including name, phone number, email address, website, and professional designations.
- Update your information as needed.
- Click **Save.**

You can also customize other information under My Profile, including:

- Personal photo and brokerage logo. (Your photo and logo must be added to your Flexmls profile before they can be used in Email Signatures [Business Cards], reports, and other marketing materials.)
- Additional phone numbers and email addresses
- Website addresses
- Personal biography
- Preferred name and display options

IMPORTANT: Make sure to complete all the My Information, including phot and logo uploads before going to the next step or you will have to go back later to add.

Some information may be controlled by the MLS membership database and cannot be edited directly in Flexmls. Contact NOMAR if you need to correct information that is locked or unavailable for editing.

B. SET UP EMAIL SIGNATURE (BUSINESS CARD)

To Do: Flexmls uses a **Business Card** as your email signature and branding on emailed reports. Your default business card can use profile fields to display your Flexmls contact information.

You can use the standard business card or create a customized version with your branding.

Customize Your Email Signature

- Click **Menu**.
- Under **Preferences**, click **My Reports.**
- Click **New**.
- Click **Business Card**.
- Name your Business Card.
- Add your information for the email signature.
- Click **Preview** to see how the finished Business Card will appear.
- Click **Save**

IMPORTANT: Make sure your Business Card includes all information needed to remain in compliance with your broker and applicable laws.

C. SET YOUR BUSINESS CARD AS THE DEFAULT EMAIL SIGNATURE

- Click **Menu**.
- Under **Preferences**, click **General Preferences**.
- Locate **Default Business Card**.
- Select your preferred business card.
- Select the option to have your **Default email signature** checked automatically when sending emails through Flexmls.
- Click **Save**.

IMPORTANT: Your selected business card can appear on emailed listing reports and serve as your signature when sending emails through Flexmls.

D. SET UP YOUR FLEXMLS PORTAL

To Do: Customize Flexmls Portal: The Flexmls Portal is your personalized client website where clients can view listings from searches you save for them, mark favorites, hide listings, and communicate with you.

- Click **Menu**, then under Preferences click **Portal Preferences**.
- Under Portal Basics, review and customize your **Portal Name** and personalized URL.
- Enable your portal by selecting **Portal Enabled.**
- Customize your **Profile Card** to display your name, brokerage, contact information, and photo.
- Set up **Featured Listings,** if desired.
- Customize the **Intro Email** your clients will receive when invited to your portal.
- Click **Save**.

Note: Setting up your portal does not automatically invite your clients. Portal access and invitations are managed individually through **Contact Management**.

3. QUICK SEARCH

Quick Search is the easiest way to search for listings in Flexmls. Quick Search always starts with Residential, you can choose other property types, by going to upper left-hand corner to Change Search Template. There you will see Residential, Multifamily, Land, Commercial Sale, Commercial Lease, Residential Lease, All Property Types & Templates you create.

A. HOW TO RUN A QUICK SEARCH

- Click **Quick Search**.
- Enter your search criteria using the fields on the left side of the screen.
- To add another field, click **Add a field to the search**, then search for and select the field you need.
- Flexmls updates the matching listings as you add or change criteria.

- Click the **List** tab or **View Results** to view the results in a list.
- To change your criteria, return to the **Edit Search** tab.
- Click **Save** if you want to save the search for future use.

Tip: You can customize your Quick Search Template so the fields you use most often are already available each time you search.

B. CREATE A QUICK SEARCH TEMPLATE

Flexmls allows you to customize Quick Search templates, so the search fields you use most often are already available when you begin a search.

Create or Customize a Quick Search Template

- Click **Menu**.
- Under **Preferences**, click **Quick Search Templates**.
- To create a new template, click **New**.
- Or, select an existing inherited template, such as **Residential**, and click **Edit** to create a personal copy.
- Enter a name for the template.
- Select the applicable **Property Type**.
- Select the **View** you want associated with the template.
- Click **Next**.
- Add the search fields you want included.
- Use **Move Up** and **Move Down** to arrange the fields in the order you prefer.
- Remove any fields you do not need.
- Click **Save**.

Note: A Quick Search Template saves the search **fields**, not the search criteria entered in those fields. If you want specific criteria to automatically apply each time, use a **Default Search**.

C. HOW TO USE YOUR QUICK SEARCH TEMPLATE

- Click **Quick Search**.
- Click **Change Search Template** drop-down menu in the upper left and select the custom template you created.
- Enter your search criteria and run your search.
- Flexmls will remember the **last Quick Search Template used** and will open that template the next time you return to Quick Search.

D. SET SPECIFIC FIELDS AS THE DEFAULT QUICK SEARCH

If you want certain search criteria to be selected automatically each time you open Quick Search, enter those criteria first.
For example, if you normally search **Parish or County = Rapides**, select Rapides, click **Save**, then click **Set as Default Search**.
The next time you open Quick Search, those saved criteria will already be selected.

4. ADDING A NEW CONTACT

- Click **Contact Management** in the top Navigation Bar.
- Click **Add Contact**.
- Enter the Contact's name.
- Enter the Contact's email address and phone number.
- Add any other contact information you want to keep on file.
- Click **Save Changes**.

The Contact will then be available in **Contact Management** and can be used later for Saved Searches and Subscriptions.

5. SAVED SEARCHES

A. CREATE A SAVED SEARCH

- Open **Quick Search**.
- Select the Property Type and enter the search criteria you want to use.
- Review the results to make sure the search is giving you the properties you want.
- Click **Save**.
- Click **Save Search**.
- Enter a name for the Saved Search.
- If the search is for a specific Contact, select that Contact.
- Click **Save**.

The Saved Search can now be opened again without having to re-enter all of the criteria.

B. EDIT A SAVED SEARCH

- Click **Menu**, then under **Search** click **Saved Searches**.
- Click the **three dots** to the right of the Saved Search name and select **View Details**.
- Click the **Saved Search name** to open the search results.
- Click the blue **Edit Search** tab.
- Make any needed changes to the search criteria.
- Click **Save**, then **Save Search** to save the changes.

C. SET UP MY FAVORITE SEARCHES

Set up My Favorite Searches – The Saved Search widget on the Flexmls Home page can display up to 100 saved searches for quick access. Mark the searches you use most often as Favorites, so they are easier to find.

- Open the **Menu** in the top left corner of Flexmls.
- Select **Saved Searches**.
- Find the search you want to update.
- Hover your mouse over the search name until a **grey star icon** appears.
- Click the star so it turns into a **filled/gold star**, marking it as a favorite.

6. AUTO-EMAILS (FLEXMLS SUBSCRIPTIONS)

In Flexmls, automatic listing emails are called **Subscriptions**. A Subscription uses a **Saved Search** to automatically send new or updated matching listings to a Contact.

A. FLEXMLS SUBSCRIPTIONS (AUTO-EMAILS)

1. Open **Quick Search**.
2. Enter the search criteria you want to use.
3. Click **Save**, then **Save Search**.
4. Enter a name for the Saved Search.
5. Select the Contact the search is for.
6. Click **Save And Add Subscription**.
7. Enter a name for the Subscription.
8. Add the **Contact**.
9. Choose whether notifications should be sent to the **Contact, yourself, or both**.
10. Select the delivery schedule: **ASAP, Daily, Weekly, or Monthly**.
11. Review or customize the email message.
12. Click **Save** to activate the Subscription.

IMPORTANT: The Contact will first receive an opt-in email from Flexmls. The Contact must open that email and confirm that they want to receive automatic listing emails before the Subscription will begin sending listings.

7. CUSTOM REPORTS

In Flexmls, the standard listing **Detail View** uses the **ROAM Detail Report** automatically.
For most users, the ROAM Detail Report will provide the listing information needed for everyday use.
Custom Reports are intended for more advanced users who want to create a specialized report with different fields or a different layout. Custom Reports can be saved and reused as needed.

In Flexmls, custom reports are created under:

- Click **Menu**.
- Under **Preferences**, click **My Reports**.
- To create a new report, click **New** and select **Report**.
- Or, select an existing report and click **Edit** to use it as a starting point.
- **Save the report with a new name before making changes** so the original report is preserved.
- Customize the report using the available fields and layout tools.
- Click **Preview** to review the report.
- Click **Save** when finished.

Note: Flexmls includes inherited reports that are provided for members' use. These reports can be used as provided, but some may not be directly editable.

8. CUSTOM VIEWS

In Flexmls, customized search-result displays are called **Views**. A View controls which columns of information appear on the **List** tab of your search results.

A. CREATE CUSTOM VIEWS

Recreate any customized search-result displays you use in Matrix.

- Run a search and click the **List** tab.
- Click the **View drop-down** and select the View you want to use as a starting point.
- Click the blue **View** link immediately to the left of the View drop-down.
- If the selected View is inherited, Flexmls will create a personal copy that you can customize.
- Enter a name for your View.
- On the **Fields** tab, add or remove the fields you want displayed.
- Drag and drop the selected fields to arrange the column order.
- Click a field name to customize its column heading, if desired.
- On the **Sort** tab, select how the results should be sorted.
- Click **Save**.

You can also create or edit Views by going to **Menu**, then **Preferences**, then click **My Views**. You can change the font in the results page, but clicking on the – or + sign directly left of the SORT button at the top right in your results screen. You can also toggle between the way your results screen shows listings by clicking on the hamburger menu or the dots with hamburger on top right of the screen.

B. SETTING A DEFAULT VIEW

Flexmls handles default Views differently from Matrix.

Each **Quick Search template** remembers the last View you used with that template. For example, if you select your custom View while using the Residential Quick Search, Flexmls will use that View the next time you open that same Residential template.

- Run a **Quick Search**.
- Click the **List** tab.
- Select your preferred View from the **View** drop-down.
- Flexmls will remember that View for that Quick Search template.

Note: You can use different Views for different property types or searches. You do not have to use the same View for Residential, Land, Commercial, or other Quick Search templates.

9. CUSTOMIZE “SORT” (THE WAY LISTINGS ARE SHOWN ON RESULTS PAGE)

- Click on the word **SORT** with the downward facing arrow that is to the left of the VIEW button at the top right.
- From the down drop menu, scroll all the way down and click **EDIT SORT**
- Choose the Type of property from the **AVAILABLE FIELDS FOR** down drop.
- Currently, it will show Status on the Selected Fields side only. You are able to add any field from the left side to the Selected Fields column to sort your results. Example: If you want the status of Active first, then Under Contract Etc, but within those Active listings, you want those to be in price order, you can and LIST PRICE and it will then sort all Actives by Price, then Under Contract by price as well and so on.

Once completed, click SAVE AS and type in a name for this particular SORT option

10. OTHER SEARCH OPTIONS

A. SEARCH BY MLS#/MULTIPLE MLS #’S

- Go to **MENU**
- Under **SEARCH**, highlight the STAR next to **MLS # SEARCH**
- It will show up in the tabs across the top of your home screen dashboard
- Click it
- Type in the MLS #’s separated by commas
- You can also do a radius search from this page with the MLS #. So if you’re doing CMA on a listing for a buyer’s specific property, you can use this feature.
- Click **SEARCH**

B. SEARCH FOR SPECIFIC AGENT/THEIR LISTINGS

- Go to **MENU**
- **SEARCH**
- **OFFICE/MEMBER SEARCH**
- Click OFFICES/MEMBERS/TEAMS at the top right
- Search for name/office/etc
- Click **VIEW MEMBER LISTINGS** if you’re looking for their listings

  (NOTE: It will now show you All Active Listings, Pending Continuing to Show, Open Predication, Closed Listings. It does not show Expired/Cancelled though. Unlike Matrix that only showed Active)

C. RADIUS SEARCH FROM THE MAP

- Choose your Template
- Choose your criteria on the left
- In the vertical map icons, click the **RED PUSH PIN** icon
- Type in the address
- Click - Use This Location
- Click **Radius Search** at bottom left of the pop up
- Type in the miles
- Create **Radius**
- Close the pop up
- Finish your search

D. TO FIND INFORMATION ABOUT A PROPERTY VIA THE MAP

- Click **Quick Search**
- Click on the **blue i icon** on the right vertical icons called "**NOSY NEIGHBOR**"
- Click on the property on the map
- It will pull up all the listing history (and be able to click on any of previous listing links), Tax Lookup link, Property Report link, Remine link
  NOTE: You can also start a radius search from this pop up as well

11. CMAS

Flexmls offers multiple CMA options, including **Cloud CMA**.

To create a CMA, first search for and select the comparable properties you want to use. Then go to **CMA** and choose the CMA option you want to create.

Different CMA tools may offer different layouts and presentation options, so choose the one that best fits your needs.

12. CUSTOMIZE YOUR DASHBOARD:

A. CUSTOMIZE YOUR GADGETS ON DASHBOARD

TO DO: Customize your Gadgets on your home screen dashboard

- Click **CUSTOMIZE** at top right of the screen from your home screen
- Click **ADD GADGETS**
- Choose which gadget you'd like to add from the list on the left side bar (NOTE: You can add more than one in each category if you'd like to see different views of one subject on your dashboard
- You can rearrange the Gadgets on the home screen by hovering over each gadget until you see the cross bars, left click and hold, drag where you want it and release.
- To change the view in each gadget, click on the three dots at top right of that specific gadget, click settings, choose your view and SAVE

- To change the layout of the dashboard, click **CUSTOMIZE** at the top right of the screen, click Change Layout, choose your preferred layout, it will automatically save once clicked
- You can also make it your default screen by clicking Make Default under the same Customize button

B. ADD "LISTINGS TO APPROVE" ON DASHBOARD

TO DO: This was previously called Concierge mode in Matrix. Now called PREVIEW MODE in Flexmls. If you want the "Listings to approve" to show up on your home screen, this is how you do it.

- Click CUSTOMIZE at the top right of the screen
- Click ADD GADGETS
- Find CONTACTS, Add this Gadget
- Click Return to Dashboard at top right
- Find the CONTACTS gadget you just added
- Click on the top right three dots
- Click Settings
- Under SHOW COLUMNS, click LISTINGS TO APPROVE

You will then see the Listings to Approve column appear in that gadget

C. TO VIEW YOUR OFF-MARKET LISTINGS IN GADGET FROM DASHBOARD

- Menu
- General Preferences
- Listings
- My Listing Statuses to Include – Choose your preferences
- My Listings Off Market – Type in the days you prefer to see
- Save

13. INPUT

Use **Add/Change** in Flexmls to enter and maintain listings.

A. ADD A NEW LISTING

1. Click **Menu**.
2. Under **Add/Change**, click **Add Listing**.
3. Select the appropriate **Property Type**.
4. Complete the listing information. Required fields must be completed before the listing can be published.
5. Review the listing for accuracy.
6. Add photos, documents, and other media as needed.
7. If you are not ready to publish the listing, click **Save as Incomplete**. You can return to it later under **My Incomplete**.

8. When the listing is complete, click **Publish Listing**. An MLS number will be assigned when the listing is published.

B. CHANGE AN EXISTING LISTING-3 WAYS

FIRST OPTION

1. Click **Menu**.
2. Under **Add/Change**, click **Change Listing**.
3. Enter the MLS number or select the listing from the available list.
4. Choose the section you need to update and make the changes.
5. Save the changes when finished.

SECOND OPTION

1. Click **My Listings**
2. While looking at the list of listings, click on the down arrow next to the MLS#, Click **EDIT LISTING** from the down drop pop up menu

THIRD OPTION

1. If you have added the **MY LISTINGS** Gadget to your dashboard, you can type in an address or MLS# into the blank and click **CHANGE LISTING** at the bottom of that gadget box
2. NOTE: You can also Add a Listing and View your Incomplete Listings from that same gadget box

C. PRINTABLE LISTING INPUT FORMS

Printable Input Forms are available if you want a worksheet to collect listing information before entering the listing into Flexmls.

1. Click **Input Forms** under **Daily Functions**.
2. Select the Property Type.
3. Select **Print possible values for fields with lists** if you want the available field choices shown.
4. Click **Print**.

The printable form contains the same listing fields used during listing entry, but it is only a worksheet. The listing must still be entered through **Add Listing**.

D. RECEIVE NOTIFICATIONS OF EXPIRING LISTINGS

TO DO: If you'd like to see a notification of your listings that are expiring soon on your homepage, you can set that up.

- Click **CUSTOMIZE** at top right
- Click **ADD GADGETS**
- Click **LISTINGS** tab on the left side

- Click **ADD GADGET** under **MY LISTINGS**
- Return to Dashboard
- Click the three dots at the top right
- Adjust your preferences for **DAYS TO EXPIRE, DAYS SOLD**, and if you want to see just your listings or the whole office listings
- Click **SAVE** (NOTE: You may have to refresh your screen in order for it to update)
- You can also do this via Menu, General Preferences, Dashboard, Listings to Expire, Sold Listings. Then go to Notifications tab and choose how many days for you to receive an email of upcoming expiring listings.

14. STATS AND REPORTS

A. STATS

If you used "STATS" in Matrix, The Stats are now in MARKET TREND GRAPHS

- **MENU**
- **STATISTICS**
- **MARKET TREND GRAPHS**
- Choose your report from the list across the top of the graph
- Click **FILTERS** at the top left
- Choose a Property Type
- Choose your criteria
- Click **NEXT** at bottom right
- Choose your dates at the bottom of the graph
- Choose whether or not you want the **DATA TABLE** included at bottom left
- You can Export, Email, or Print from top right

B. MARKET REPORTS

If you used Market Reports in Matrix, ALL MARKET REPORTS are now housed in "MARKET TRENDS REPORTS"

- **MENU**
- **STATISTICS**
- **MARKET TREND REPORTS**
- Click which report you'd like
- Click **NEXT**
- Choose your criteria
- Click **NEXT** at bottom right

C. AGENT PRODUCTION REPORT

Your personal production is now under Inventory & Production Reports.

- **MENU**
- **STATISTICS**

- **INVENTORY & PRODUCTION REPORTS**
- **PRODUCTION REPORT** shows both listing and selling sides
- **AGENT LISTING ACTIVITY** shows just your listings

15. SET UP COMPARABLES PRESETS:

You can choose to do comparables while doing a general search for properties by choosing any of those properties while in the search itself. You can set up your parameters first

- Go to **Menu**
- General **Preferences**
- **Comparables Tab**
- Type in your criteria of what you'd want to see while doing comps
- Click **SAVE**

To use this feature:

- Do any search you want
- In the **DETAIL** view where you can see the properties to the left of the map, find whichever listing you'd like to do comps for
- Click on the down arrow next to the MLS #
- Click **SEARCH COMPARABLES**
- It will then automatically use the criteria you saved previously in the General Settings section above.
- You can adjust the criteria if you need to for this specific comp search.