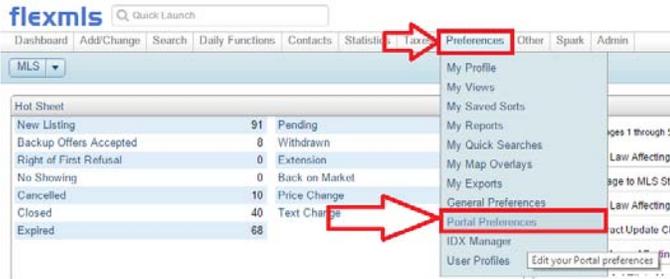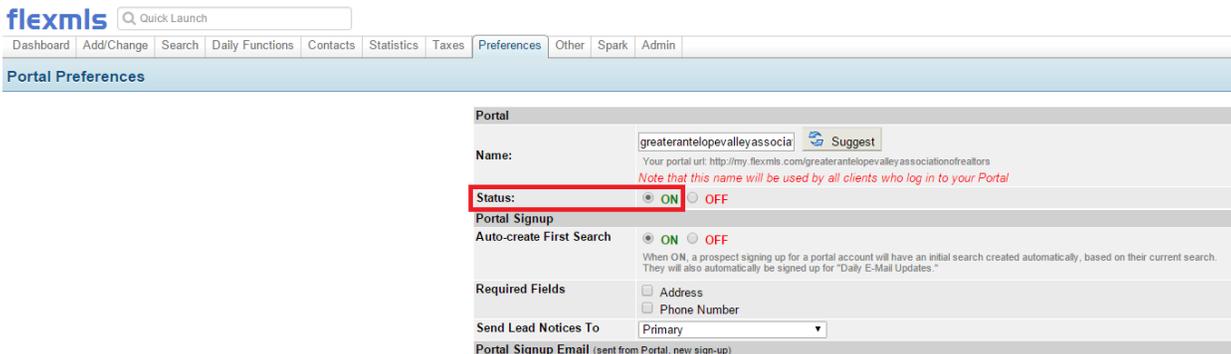# How to Create and Manage a Portal

Note: This guide will show you how to create and manage a portal in FlexMLS. Keep in mind during some parts of this guide there are different ways to accomplish the same task.
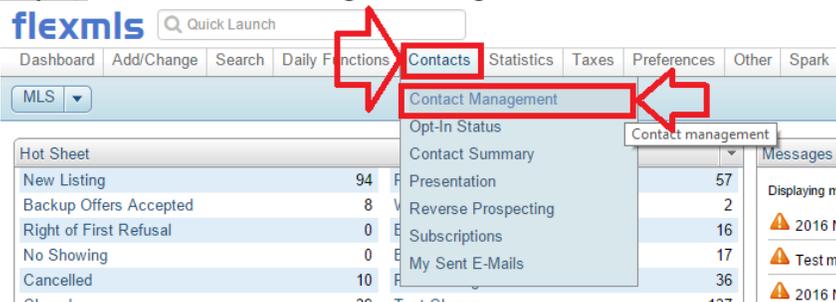
Step 1) Make sure you have portals enabled

- **Go to the "Preferences" Tab and select "Portal Preferences"**
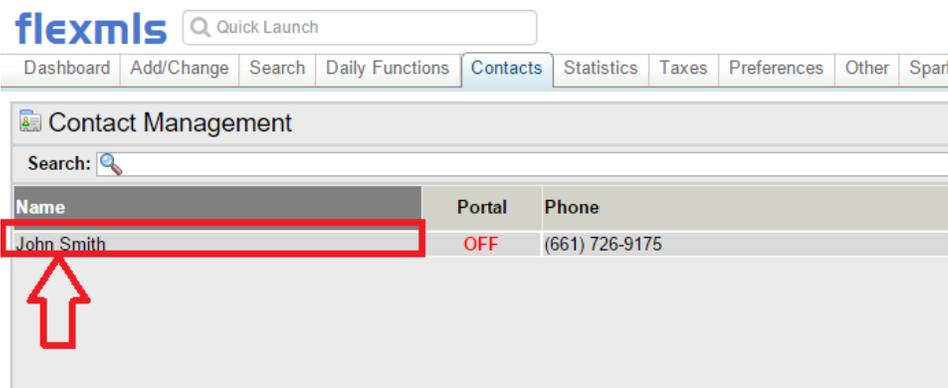

- **Make sure you have your "Status" set to "ON".**
- **Note: There are more options on this page for your portal. If you would like to change them please feel free to do so, but this guide will not cover this page.**

Step 2) Go to Contacts Management Page

- **Go to "Contacts" then "Contact Management"**

- **Click on the Contact name you wish to create a portal for**

- **Once you click on their name, There will be new tabs below that will appear (See picture) Click on "Portal"**

- **Here you will be given a chance to give the Client a password (you can either create one for them by typing it in yourself or hitting "generate" do which ever you prefer).**
- **Once ready, click on "Turn on portal, create account"**
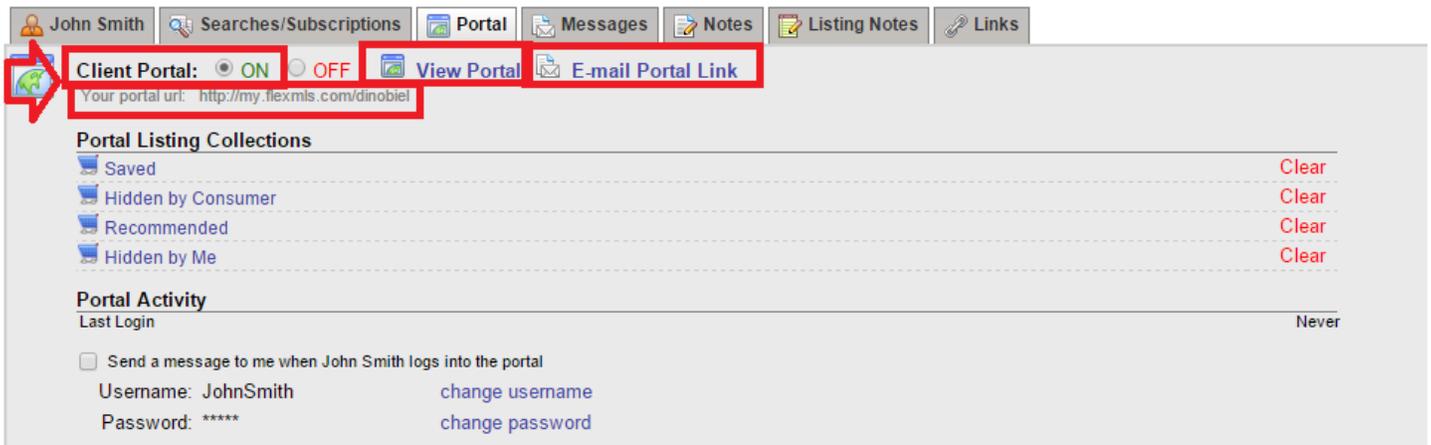
- **Great! Now you have set up a portal. You can actually view the portal as well by clicking on "View Portal". As of right now though, the portal is empty. What we need to do to populate the portal is save a Search to the client. Let's go to the "Searches/Subscriptions" Tab**

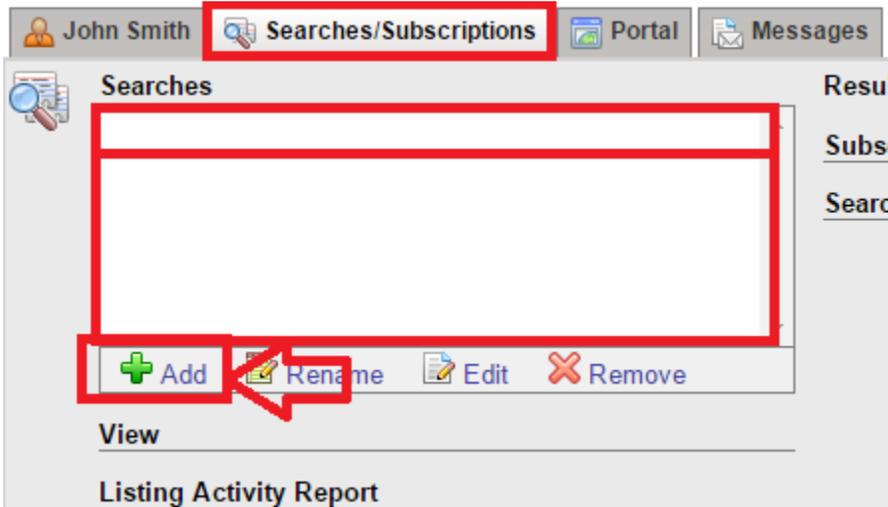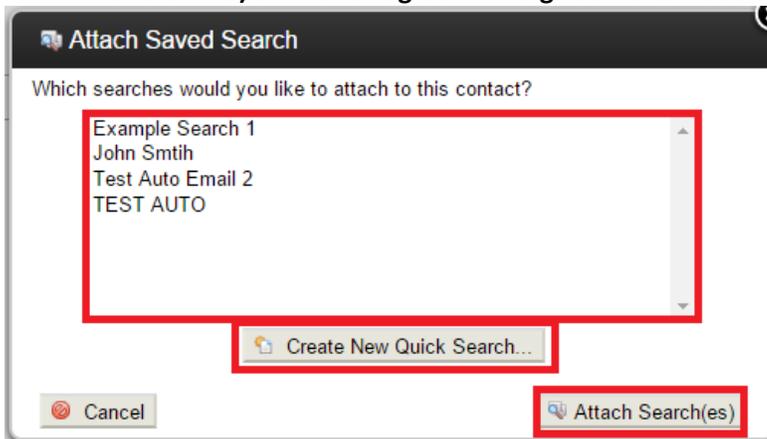- **If you have no searches for the client you are going to need to create one to fill the portal. If you already have a saved Search for the client then your portal should be complete! If the box above is empty for you (like it is here for me) click on the green "+" sign so we can add a search.**

- **Once this box comes up, if you have a general search you would like to add Click on it, then click "Attach Search(es)" If you don't see a search you can use click on "Create New Quick Search…"**
- **Note: If you Clicked "Attach Search(es)" and it completes, you are done! If you did not….continue with this guide.**

Available Quick Searches

1- Residential (Greater Antelope Valley Association of REALTORS®)
2 - Mobile Home (Greater Antelope Valley Association of REALTORS®)
3 - Rental (Greater Antelope Valley Association of REALTORS®)
4 - Lots and Land (Greater Antelope Valley Association of REALTORS®)
5 - Multi Family (Greater Antelope Valley Association of REALTORS®)
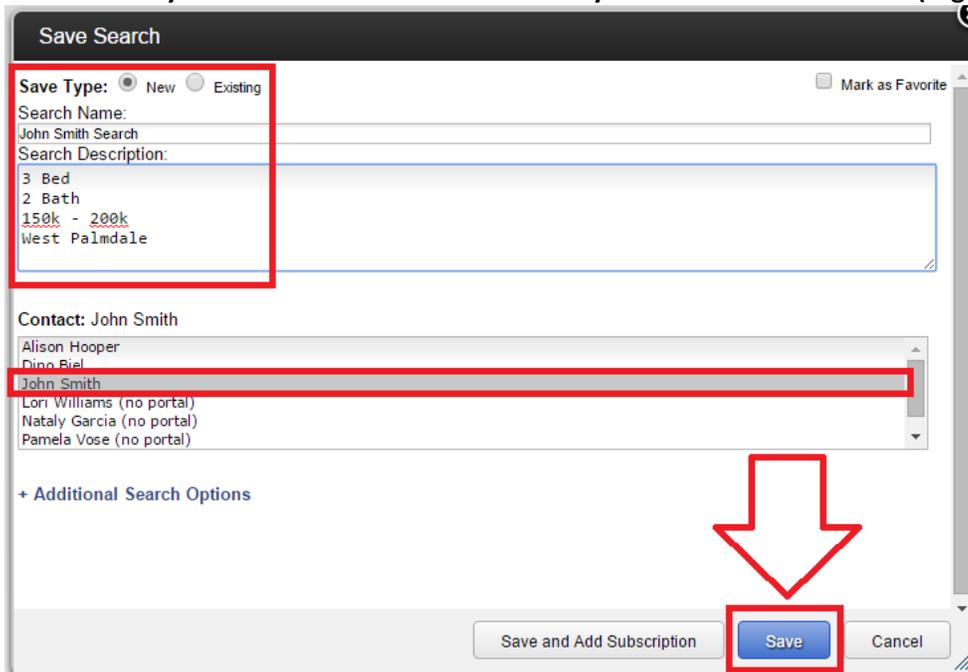6 - Commercial (Greater Antelope Valley Association of REALTORS®)
7 - Commercial Lease (Greater Antelope Valley Association of REALTORS®)
8 - Business Opp (Greater Antelope Valley Association of REALTORS®)
9 - Multi-Property (Greater Antelope Valley Association of REALTORS®)
9a- APN Search (Lots and Land) (Greater Antelope Valley Association of REALTORS®)
9b- APN Search (Residential) (Greater Antelope Valley Association of REALTORS®)
9c- Office Listings (Greater Antelope Valley Association of REALTORS®)
Public Property Search (Greater Antelope Valley Association of REALTORS®)
Report Generation (Greater Antelope Valley Association of REALTORS®)

✔ Use

2016 MLS and FBS. Prepared by Dino Biel on Friday, February 05, 2016 3:5 PM.

- **Choose "Residential" then "use"**

Share   Save   E-Mail   Print
Save Search or Collection
Edit Search | List | Detail | Ph

1,076

listings matched your search
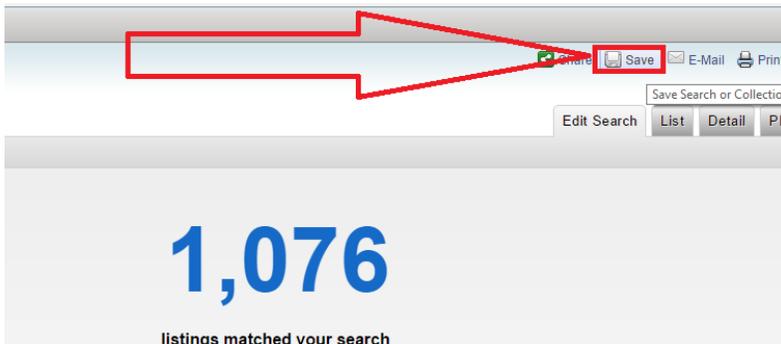
- **Once you have chosen all the criteria for your client Click on "Save" (Highlighted above)**

Save Search

Save Type: ● New ○ Existing   ☐ Mark as Favorite
Search Name:
John Smith Search
Search Description:
3 Bed
2 Bath
150k - 200k
West Palmdale

Contact: John Smith

Alison Hooper
Dino Biel
John Smith
Lori Williams (no portal)
Nataly Garcia (no portal)
Pamela Vose (no portal)

+ Additional Search Options

Save and Add Subscription   Save   Cancel

- **Add a name to your search, add a description as well**
- **In the second section chose your client you want to save this search to**
- **Finally click the "Save" Button Down below**
- **Once you save you will be given some options you can read through, but once you are done... Go back to your clients page by repeating the very beginning of STEP 2**

- As you can see now, under the "Searches/Subscriptions" Tab there is now a saved Search
- Go to the "Portal" Tab then Click "View Portal"

- As you can see above you are now finished! You have successfully completed your portal and populated it with listings!
- Keep in mind as listings meet your saved search criteria your portal will automatically update for your client!