



## Re-building Saved Searches and/or Auto Emails (Auto-Notifications)

There are a few steps that you will need to complete, in order to <u>rebuild</u> any saved searches and/or auto emails in your BeachesMLS's Flexmls.

## Prior to Transfer (in Matrix)

1. Find the searches which you'd like to rebuild later. They can be found in either "Saved Searches" or "Auto Email", under the "My Matrix" menu.

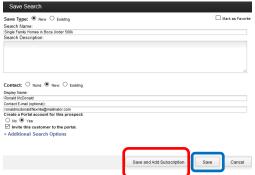
Summary
Contacts
Carts
Auto Email
Saved Searches
Sent Email

2. Clicking on any search will expand its settings and criteria. At this point, click on the searches which you're interested in rebuilding later. While the criteria is showing, you can print out the current view OR copy/paste the title and criteria into another document (e.g. a word OR text file). Make a note of the contact name, if desired.



## After the Transfer (in Flexmls)

- 1. Make reference to the printout and/or text file with the search criteria that you saved, and re-create each desired search by clicking on the "Quick Search" option, within the Flexmls menu (top-left corner of the screen).
- 2. After reviewing the list of results for your re-created search, begin the process to save it by clicking on the "Save" button on the top-right. Then click on "Save Search".
- 3. To mimic the Matrix Auto Email, enter a name for your search, add a contact to it, create a portal & invite the customer, then click on the "Save and Add Subscription" button. If you're saving the search criteria ONLY, simply add a name to your search and press the "Save" button.



## Items to Note

- 1. Saved Searches and/or Auto Emails cannot be exported. The procedure above is a work-around, due to the lack of an export function for searches within the Matrix application.
- 2. Some of the fields from your existing MLS might not be labeled the same as in the BeachesMLS Flexmls system. Please contact our support team for guidance with an appropriate replacement in Flexmls.