# Dashboard
Table of Contents

Dashboard

The Flexmls® Web Dashboard is the first page you see when you access the system. Using the Menu and your Flexmls dashboards, you can access every function of Flexmls Web. To return to your default dashboard from anywhere in the system, click on the Flexmls logo in the upper left corner of the page.

FLEXMLS MENU

When you first log on to the Flexmls system, a default set of one-click (favorite) menu items are displayed horizontally across the top of the page. Click the **Menu** button at the left to see the fully expanded menu and modify favorite menu items. Click a menu item to go to that page. For example, click **Quick Search** to start a new search.
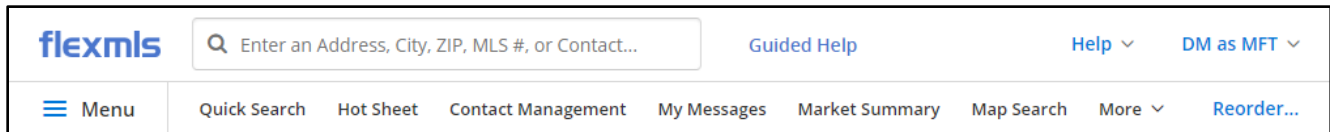
After you click **Menu**, you can type in the search box to find a menu item. For example, if you type "sav" in the search box, the menu options narrow to show matching results, including Saved Searches.
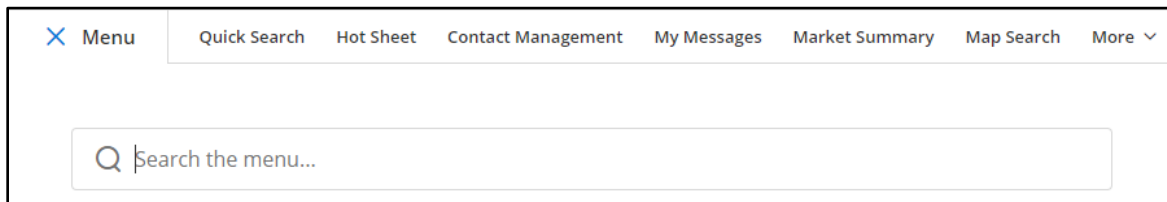
Favorites Bar

Favorite menu items give you one-click access to the pages you use the most. To mark a menu item as a favorite, hover the mouse over the item. Click the **Add to Favorites** star to create a one-click shortcut to it on the Favorites bar. To remove an item from the Favorites bar, click on the star next to an existing favorite. If you have more menu items in your favorites than can be displayed on the Favorites bar, a More link will be displayed, where you can access the rest of your favorites.
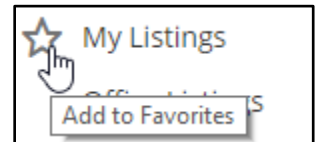
To rearrange the order of your favorites, click the **Reorder** link on the menu bar. Click and hold a menu item to drag and drop it into a new location. To remove an item from your favorites, click **Remove**. Click **Save** when you are done managing favorites.

Flexmls Help

At the top right of Flexmls, use the Help menu to find information about Flexmls features. Click **Help with this page** to access help that is specific to the current page. Click **User Guides** to access PDF documents about Flexmls topics. Click **Video Tutorials** to access training videos and recorded webcasts. Contact information for support is available when you click **Contact Support**.

Click the **Guided Help** link to the right of the Search bar to open the Guided Help Resource Center. Type a keyword in the search bar to find a topic. Click on one of the step-by-step walkthroughs to start an interactive tutorial of a task in Flexmls.
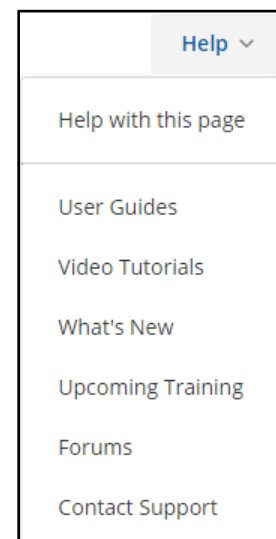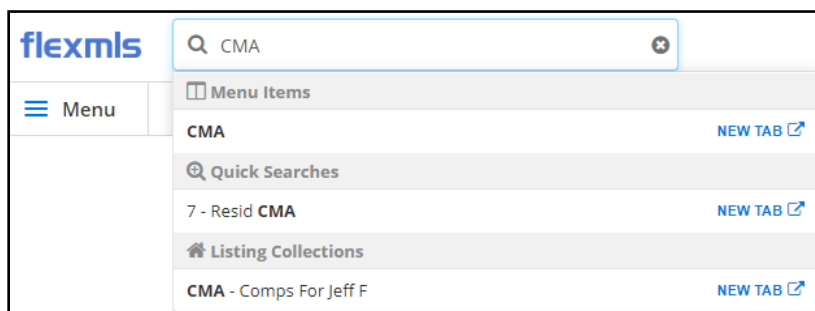
Quick Launch

The Quick Launch bar is always available next to the Flexmls logo in the upper left corner of the page. Use the Quick Launch bar to begin a search for the following types of information:

- Basic search criteria (property type, status, price range, beds, baths, and more)
- Saved searches
- Offices
- Members
- Contacts
- Listing collections
- MLS numbers
- Quick search templates
- CMAs
- Listing addresses
- Menu items

Start typing in the Quick Launch to initiate a search. A list of results will appear.

Click on an item or use the Enter button or Tab button on the keyboard to open the highlighted item in the list. Click the **New Tab** link to the right of a Quick Launch search result to open that page in a new browser tab.

DASHBOARD CUSTOMIZATION

By default, Flexmls includes an MLS dashboard for MLS information and a Home dashboard for your personal information. You can create additional dashboards or customize your Home dashboard to show different data. The drop-down menu at the top of the dashboard displays the name of the current dashboard. Click to expand the list and select a different dashboard.
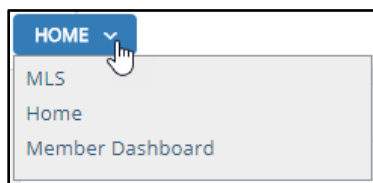
Dashboards are made up of panels, or gadgets, that display information. You can add or customize dashboards with the gadgets you need to do your work. (The MLS and Classic dashboards have a fixed layout, and you cannot change them.)

Add Gadgets

Gadgets are available for many of the main functions of Flexmls Web, as well as third-party integrations such as Facebook. To add a gadget to a dashboard under your control, click **Customize** and select **Add Gadgets**.

At the left edge of the page, select a category of gadgets, or choose **All** to browse through all available gadgets. To add a gadget to the selected dashboard, click **Add Gadget**.

To add gadgets to another dashboard, select it from the drop-down list at the upper left corner.
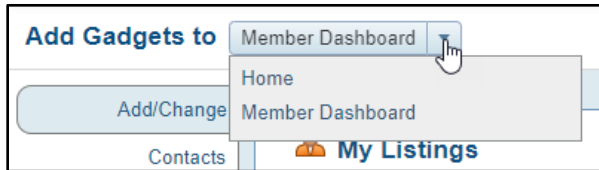
When you are finished adding gadgets, click **Return to Dashboard** to view the updated dashboard.

You can add more than one gadget of the same type to a dashboard. For example, you can add multiple Contacts gadgets to simultaneously review information for IDX Leads and Sellers.
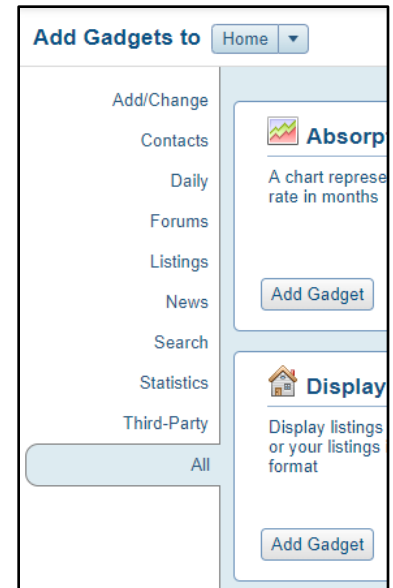
Gadget Settings

At the upper right corner of a gadget, click the three vertical dots to access gadget-specific options. For all gadgets under your control, you can click **Settings** to customize the information that displays in the gadget. Use the **Refresh** option to refresh information on a time-sensitive gadget, such as the Hot Sheet. Click **Maximize** to enlarge a gadget to fill the available space in the browser window. When a gadget is maximized, you can click **Restore** to return the gadget to its original size. The Remove option removes the gadget from your dashboard. Additional options are available for specific gadgets.
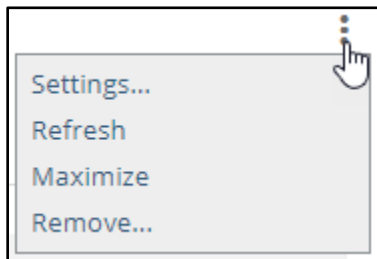
Change Layout

For any dashboard under your control, you can use the Customize button to change the layout of the dashboard. You can choose from predefined layouts that contain one, two, or three evenly spaced columns, or several combinations of wide and narrow gadgets, depending how you want the information to be displayed.
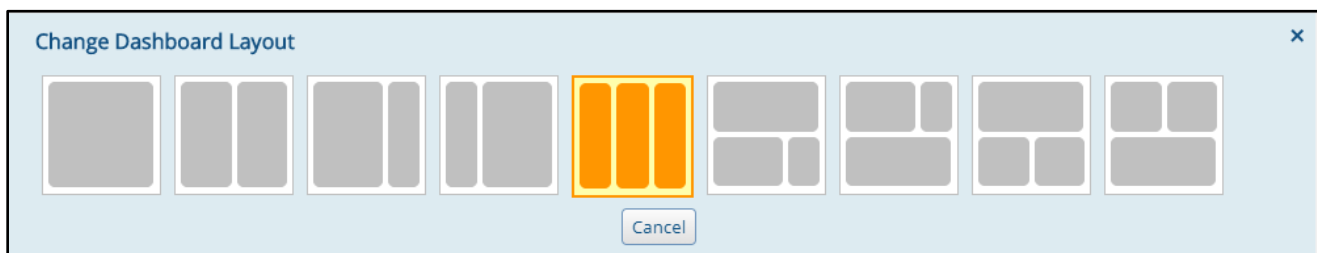
Reorder Gadgets

Rearrange the order of the gadgets on the page by clicking on a gadget header and dragging the gadget to a new position on the page. You can rearrange any dashboard under your control. The changes that you make will save automatically when the gadget has been released.

Rename

Click the **Customize** button and then click **Rename** to edit the name of the current dashboard. You can rename any dashboard except the MLS dashboard and the Classic dashboard.

Make Default

You can change your default dashboard, which displays when you first log on to Flexmls Web, or when you click on the Flexmls icon in the menu bar. First, select the dashboard from the dashboard menu. Click **Customize**, then select **Make Default**.
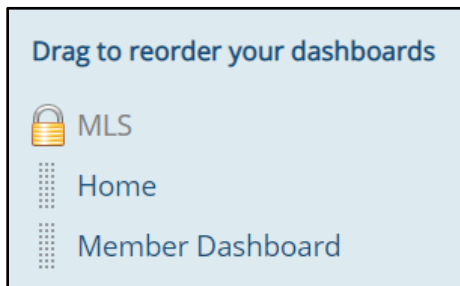
Add Dashboard

To create a new dashboard, click **Customize**, then click **Add** under Dashboards. On the Recommended Dashboards page, select from the predefined dashboards or use a blank dashboard template to start from scratch and add just the gadgets you need.
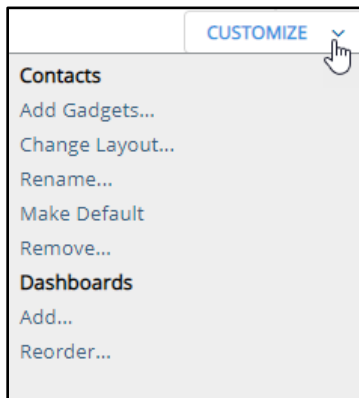
Reorder Dashboards

To change the order in which dashboards are displayed in the menu and drop-down list, click **Customize**, then select **Reorder** under Dashboards. A list of your dashboards will appear. Click on a dashboard name and drag it to a new position on the list. The position of the MLS dashboard is locked, and no dashboard can be moved ahead of the MLS dashboard.

Recommend Dashboards

If you have administrative privileges for the MLS or your office, you can create dashboards and recommended them to members.

Click **Recommend Dashboard** and choose a layout and name. A dashboard description is optional. You can add a recommended dashboard to the dashboard drop-down list, or you can make it the default dashboard for members who have not yet modified their custom dashboards. If a member has already modified their custom dashboard, recommended dashboards will not apply to them. Click **Create Dashboard** to save your recommended dashboard.

To remove or edit a recommended dashboard, click the **Customize** button and select **My Recommendations**. Click **Edit** to change a dashboard or click **Remove** to delete a dashboard.

MLS DASHBOARD

To stay up to date on MLS information and your market, click on the MLS dashboard. This dashboard is controlled by your MLS and is the same for all members of your MLS. Members cannot customize the content on the MLS dashboard.

HOME DASHBOARD

The Home dashboard is your personal dashboard. The information on this dashboard is displayed based on the current user.

Contacts Gadget

The Contacts gadget displays a list of your contacts and a summary of the listings that match their assigned searches. Type in the box at the top to filter the list or go directly to a contact. If you have set up groups for your contacts, you can select a group to display in the gadget. Click on a column header to sort by that column. Use the gadget settings to add or remove columns from the gadget.

Click a number in the *Listings* column to see listings sent to the contact via a subscription. Click a number in the *Listings to Approve* column to review and approve listings sent via a subscription that uses preview mode. Click a contact name to open the Contact Management page with the contact selected.

Name ▲	Listings	Last Match	Listings to Approve
Megan Phillips	65	1/27/2019, 10:55:07 AM	706
Arnold Drummond	669	1/28/2019, 11:00:08 AM	-
Kate Ren	-	-	-
John Adams	12	1/24/2019, 8:18:51 PM	-
Aaron Anson	1563	1/28/2019, 11:00:08 AM	-

New Search Gadget

Use the New Search gadget to run searches based on quick search templates. Click on the **New Search** header to start a new search based on the default template. Use the text box below the header to type in an MLS number or additional location fields as available.

By default, links will appear to run a full search, if available, or residential quick search. Use the gadget settings to customize the gadget to display the search templates you use most often. If your MLS uses full search, you can also preselect the full search property types and statuses that you use most often.

New Search

Street Address or MLS #   Run Search

1 - Residential   8 - Multi-Property
2 - Multi-Family   Public IDX Search
6 - Quick Template

Hot Sheet Gadget

The Hot Sheet gadget gives you one-click access to any section of the hot sheet. Click on the header to open the Hot Sheet page, where you can run a custom hot sheet.

By default, the gadget shows listing updates for the past 24 hours. Click the drop-down list at the top of the gadget to change the timeframe to 48 hours, 72 hours, or the past week. The newly selected timeframe becomes the default for that gadget. If you use the gadget's settings to modify the hot sheet's filters (for location, property type, etc.), the timeframe will not change unless you manually change it again.

Hot Sheet			
1 week			
New Listing	26	Withdrawn	0
Cancelled	9	Extension	4
Closed	19	Back on Market	1
Expired	0	Price Change	20
Pending	23	Text Change	80

Saved Searches Gadget

The Saved Searches gadget displays a list of your saved searches. Click on the header to open the Show My Saved Searches page, where you can view details about all your saved searches. Start typing in the text box at the top of the gadget to find a saved search.

Use the gadget settings to customize the number of searches displayed in the gadget, the order they are displayed in, and whether all saved searches or just favorites are displayed. (To mark a search as a favorite, click the star icon in the Description column on the Show My Saved Searches page.)

Description
☆ Not a favorite (click to add)

My Listings Gadget

The My Listings gadget gives you one-click access to your active, pending, withdrawn, expiring, or recently sold listings. Click on the header to open the My Listings page. (The statuses included on the My Listings page are controlled by the My Listings setting in General Preferences.)

Click one of the gadget links to view the listings in a category. Use the Listing Maintenance section of the gadget to add a listing, change a listing, or continue working with an incomplete listing.

Use the gadget settings to customize the time period when expiring and sold listings are displayed in the gadget. You can also select whether the gadget displays listings for yourself, your office, or your company.

My Listings	⋮
My Active Listings	0
My Pending Listings	0
My Withdrawn Listings	0
My Listings to Expire	0
My Closed Listings	0

Listing Maintenance

Add Listing

[   ] - [   ] Change Listing

Incomplete Listing

Display Listings Gadget

Use the Display Listings gadget to display listings based on a saved search. Use the gadget settings to customize which listings are displayed in the gadget.

MLS #	Address	LP ▲	ADOM
19-385	108 WISCONSIN Street	$88,000	8
18-6120	425 5TH Street S	$79,000	71
19-333	851 ELM Street	$69,900	116
18-4417	421 7TH Street S	$69,000	177
18-6179	525 5TH Street SE	$64,700	64
18-6321	228 2ND Street NE	$46,900	51