

# Fusion 101 Working With Buyers





## Fusion 101

Working with Buyers

**FMLS Institute of Real Estate** 

5457 Roswell Road Atlanta, Georgia 30342 404-255-8660





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### **Table of Contents**

BOUT FMLS	
OUR COMMITMENT TO MEMBERS	
FMLS Products and Services	3
GEORGIA REAL ESTATE COMMISSION CONTINUING EDUCATION COURSE GUIDE	LINES 4
CONTINUING EDUCATION	4
ATTENDANCE POLICY	4
CELL PHONES	4
Prohibition of Recruiting (520-2.15)	4
NOTICE OF STUDENT APPROVAL (520-2.11)	4
Course Credit	5
Objectives	6
ICON KEY	6
Introduction to Fusion	7
SUPPORTED OPERATING SYSTEMS AND BROWSERS	7
LOGGING IN TO FMLS AND FUSION	8
LOGGING IN TO WWW.FMLS.COM	8
How We Communicate with You	9
FMLS HOMEPAGE	1
LOGGING IN TO FUSION	1
FUSION HOME PAGE	1
Navigation Tabs	1
GADGETS	1
MOVING GADGETS	2
REMOVING/RESTORING GADGETS	2
NAVIGATING THE FULL SEARCH SCREEN	2
THE SEARCH TASK BAR	2
Performing a Search	2
Using Field Operators	3
THE ADVANCED OPERATOR	3
OVERLOOKED FIELDS	3
YEAR BUILT OPERATORS	3
Days Back Operators	3
SUBDIVISION AND STREET NAME OPERATORS	3
Address Search	3
PUBLIC AND PRIVATE REMARKS	3
SPECIAL CIRCUMSTANCES	3
Cross Property	3
RUNNING MULTIPLE SEARCHES	3
USING THE FUSION MAP	3
Using the Locator Tool	3



USING THE SEARCH BY MAP FEATURE	39
USING THE MAP OVERLAY	41
Using Points of Interest	41
SAVING FUSION SEARCHES	44
CUSTOMIZED AND DEFAULT SEARCH PANELS	47
Working with Results	50
THE GRID VIEW	50
CHANGING THE COLUMN ORDER	52
FILTERING SEARCH RESULTS	53
More Viewing Options for Results	54
THE GALLERY VIEW	55
Using Custom Grids	59
PROPERTY DETAILS	62
USING THE LINKS PANEL	64
Photo Gallery Link	64
Map Link	65
HISTORY LINK	66
OPEN HOUSE LINK	66
LINKED CONTACTS LINK	67
DOCUMENTS LINK	67
SUPRA KEYBOX LINK	68
RATEPLUG MORTGAGE INFO LINK	68
AREA DESCRIPTION LINK	69
NEIGHBORHOOD INFO LINK	69
REALIST TAX LINK	70
VIRTUAL TOUR / LINKS	71
DIRECTIONS LINK	71
Edit Record Link	72
REPORT A VIOLATION LINK	72
MISCELLANEOUS LINKS	73
REPORT FORMATS	74
CUSTOMIZING THE DETAILS PAGE	75
PREPARING TO SHOW PROPERTIES	76
EMAILING LISTINGS	76
Adding an Email Signature	78
PRINTING PROPERTY INFORMATION	80
DRIVING DIRECTIONS	85
LOGGING OUT OF FUSION	88
REVIEW OF OBJECTIVES	89
WPARILE QUESTIONS	89



#### **About FMLS**

First Multiple Listing Service, Inc. (FMLS) is the premier data services provider for real estate professionals in Georgia. FMLS was founded by a handful of real estate brokers in Atlanta in 1957. Today, membership is growing quickly and is spreading in every direction throughout Georgia and the Southeast. Currently, FMLS has thousands of offices and serves tens of thousands of real estate agents. The FMLS listing database contains active listings located all over Georgia and the Southeast. A network of computers, servers and third party support vendors enable member offices and agents to have immediate electronic access to all listing information maintained in the FMLS premier web-based system, Fusion. In addition to property data, our listings are enhanced by the use of photos, virtual tours, tax information, mapping, school information, census data and more!

Real estate companies that belong to FMLS enjoy maximum coverage and exposure for their clients. An independent study shows FMLS listings sell, on the average, much faster than those placed with other multiple listing services.

Through our main office and two satellite locations, FMLS members have access to: help desk support 7 days a week; on-site hands on training; online training; and free CE classes. Also, real estate supply centers are available at all three locations.

#### Our commitment to members

FMLS' mission is to "help fulfill financial dreams by providing superior technology, service, and training to facilitate the success of our members."

#### **FMLS Products and Services**

#### Free Products and Services

Fusion Comprehensive Statistical Reports

Realist Next Gen FMLS Stats
FormsPro StatsPro
eSign Xceligent
1st Addition Contact Website
DocuPro Georgia Open Houses

FIND ListingBook
Kurio.com Property Panorama Virtual Tour

RatePlug Member Discounts

Safe Rent



### **Georgia Real Estate Commission Continuing Education Course Guidelines**

All classes are on a pass/no pass system. Please review the policies below regarding attendance, cell phones, recruiting and student approval.

#### **Continuing Education**

All individuals who hold an active real estate license are required to complete 24 hours of Commission approved continuing education during each four year renewal period. (Licensees whose license numbers are less than 100,000 are not required to complete continuing education for renewal). A renewal period begins four years prior to the current renewal due date. For example, Commission approved continuing education must be completed between April 1, 2007 and March 31, 2011 for a renewal due date of March 31, 2011.

A licensee who has successfully completed an approved course to meet his continuing education credit may not repeat that course for credit unless at least one full year has passed. The course may be repeated on the 366<sup>th</sup> day to receive CE credit.

#### **Attendance Policy**

To receive certification for this course, under the school approved by the Georgia Real Estate Commission, for three hours of continuing education credit, all students must be present and on time for all classroom presentations. This requires students to be seated and ready at the announced commencement time and promptly return from all breaks, being ready to participate in all exercises. Attendance will be taken at the beginning, at the resumption after breaks and again at the end upon completion of the course. A no make-up policy for missed classroom presentations is hereby adopted. Failure to comply will nullify the student's opportunity to receive the designated credit.

#### **Cell Phones**

The use of cell phones and pagers during the presentations is expressly prohibited. Please set all equipment in the vibrate or off mode. Failure to comply will nullify the student's opportunity to receive the designated credit.

#### **Prohibition of Recruiting (520-1.B4)**

No recruiting for employment opportunities for any real estate brokerage firm is allowed in this case or on school premises. Report promptly any effort to recruit by anyone to:

Michele Morris at 404-490-4618, FMLS Institute of Real Estate, P.O. Box 420128, Atlanta, GA 30342 - or - The Georgia Real Estate Commission.

#### **Notice of Student Approval (520-1.B2)**

Fusion 101: Working with Buyers was renewed as a Continuing Education course, good for 3 hours of Continuing Education Credit, through 12/31/2016 (School Code: 4352.)

The approved instructors are Kevin Theobald, Bob Ramsey, Joi Hardiman, Sallie Mobley, Richard Renton, Kay Burt, and Jan Beaudoin.



#### **Course Credit**

Continuing Education Credits will be entered within two weeks. To verify your credit, you must call the Georgia Real Estate Commission (GREC): 404-656-3916, or visit http://www.grec.state.ga.us/info/wcls.login. You will need to enter your license number and set up a password to gain online access to GREC transactions.



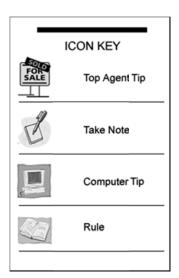
#### **Objectives**

At the end of this course, you will be able to do the following things:

- Access and navigate www.FMLS.com and Fusion
- Use Home Page Gadgets to quickly access information in Fusion including listing database additions and changes, personal inventory, contacts and more.
- Use Fusion to locate and research properties for your customers and use field operators to obtain optimum results.
- Use the Fusion interactive map to draw geographic criteria for searches, understand best uses for various map views, and utilize the map overlays and points of interest tools.
- Recognize the value of saving searches; create and save unique searches for clients; create a customized search panel; edit, run and delete saved searches.
- Use Fusion's varied Results views to manage search results and to highlight buyers' primary wants/needs; sort and filter property matches for faster analysis; create customized Results grids; edit, recall and delete a custom grid.
- Utilize the information in an Agent Detail Report to research and analyze a property.
- Email and print property information and prepare driving directions to show properties.

#### **Icon Key**

Look for these helpful icons as you advance through guide.





#### **Introduction to Fusion**

Whether you are a broker or an agent, your accomplishments depend on a host of capabilities such as accessing key information, managing operations efficiently, improving productivity, finding new revenue streams, and much more.

Launched in 2012, Fusion, by Corelogic MarketLinx, is a new MLS interface that provides a fast and easy MLS experience. Fusion runs on most major computer operating systems and browsers, including Mac OS, Safari, \*Chrome, & Firefox.

Fusion offers many exciting and innovative features, including:

- Multi-tasking: the ability to edit multiple listings, run multiple searches, etc.
- Three-way integration between Search Results, Mapping and Images
- Easy-to-use map shape drawing tools, points of interest, and informative overlays
- Demographic content and charts
- Auto-generated Quick CMA
- Email/home page notifications triggered by website activity
- Reverse Prospecting
- Uploading multiple images for a single listing simultaneously
- Document upload via Fax cover page option
- Listing statistics that show the number of MLS views, IDX views, and times added to Favorites, etc.

#### **Supported Operating Systems and Browsers**

Windows XP SP3	Internet Explorer 7 or 8, Firefox 4.0 and above, Google Chrome or Safari 5.0 and above
Windows 7	Internet Explorer 8 and 9 and Internet Explorer 10 Desktop, Mozilla Firefox 4.0 and above, Google Chrome and Safari 5.0 +
Windows 8	Internet Explorer 10 Desktop
MAC OS X v 10.5-10.6	Safari 5.0 or higher, Mozilla Firefox 4.0 and above, Google Chrome
MAC OS X v 10.7	Safari 5.0 or higher with Flash 11.4+ Mozilla Firefox 4.0 and above, Google Chrome
MAC OS X v 10.8	Safari 6.0



#### Logging in to FMLS and Fusion

To log in to FMLS, you must be an FMLS member with your own user name and password. Your broker must submit a Computer User Form to obtain these. Do not share your user name or password with other agents or clients.

FMLS requires bi-annual password change for security purposes. You will be prompted to enter your old password and then your new password. The password can contain both letters and numbers and must be at least 6 characters in length. You cannot use the same password twice.

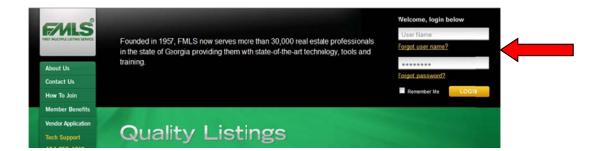
If you need to change your password before the bi-annual change, go to the FMLS.com home page, hover over My FMLS on the left navigation bar, and click on Change Password.



Disclosing your user name and password to another party (other than a team member or assistant within that office) can result in a fine of \$1000 and termination of service. (Rule 11.1)

#### Logging in to www.FMLS.com

- 1. From your computer desktop, open an Internet browser window.
- 2. Navigate to **www.fmls.com**.
- 3. Enter your User Name and Password and click **Login**.





#### **How We Communicate with You**

At FMLS we provide more to our members than just access to a database of listings! We use several methods to pass along important information including Real Estate market trends (both locally and nationally); state and local news that impacts our market; updates and bulletins when our software products are affected; and more! Please take advantage of one, or all of the methods.

#### **Email**

Our primary method of communication with our members is email. FMLS will send electronic communications regarding important changes to our products and services. Please be sure to add FMLS to your trusted sender list.

#### FMLS.com

The FMLS.com home page is another important and central communication channel we have with our members. It acts as command central. The story carousel rotates through 3 very newsworthy topics which are changed regularly, giving you fresh, relevant information! Pause for a moment to read a few lines to determine whether today's topics are of interest to you. If they are, click on the **Read More** button to see the whole story. The topics automatically rotate on the screen, but you can click to flip to the stories faster if desired.





#### **NewsRoom**

The **NewsRoom** button on the left navigation bar contains an archive of stories previously included in the carousel. Check the NewsRoom regularly to make sure you didn't miss something important, or to re-read an article!



#### Message of the Day

**Message of the Day** is another FMLS.com feature you'll want to watch for. Critical issues such as those pertaining to agent safety, a software issue or FMLS hours of operation will be displayed there.



#### **Social Media**

Additionally, FMLS posts notices and real estate driven content to three different social media channels: Twitter, Facebook, and LinkedIn. Yes! Social Media! FMLS is involved in Social Media because it is so popular in today's technology-driven world. Twitter and Facebook content contains both FMLS and real estate industry news. LinkedIn concentrates more on FMLS news and professional development. Like us on Facebook, follow us on Twitter, and join the FMLS group on LinkedIn. You'll be glad you did – and you'll have information most of your counterparts don't have!







Follow us on Twitter @flms\_news @flms\_alerts Like us on Facebook http://www.facebook.com FMLSmembers

Join the FMLS group on LinkedIn www.linkedin.com/groups?gid+1889382



#### **FMLS Homepage**

When you first login to FMLS you see the FMLS Homepage. The FMLS Homepage is divided into seven primary sections:



- Frequently Used links located at the top of the site, this bar provides easy access links to the most frequently used FMLS software Fusion, 1<sup>st</sup> Addition, FormsPro, Georgia Open Houses, Supra and more.
- **2 Alert Bar** Important and breaking news will be displayed in this area.
- Navigation Bar access to useful FMLS membership tools is provided down the left side of the page and includes:
  - **System Links** one click access to popular FMLS software.
  - **Tools For Success** find software overviews, media tools, statistical tools and other important member information here.

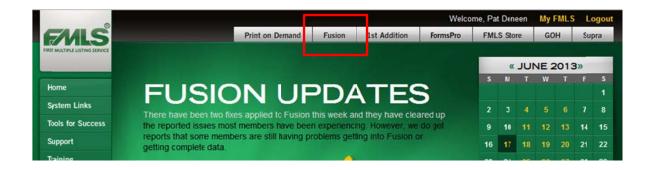


- **Support** get technical and administrative help, contact information, Rules and Regulations, Policy and Procedures, FAQs, area maps and other resources under this tab.
- Training find information on classes you for which you are currently registered; course descriptions; a library of online training videos; a calendar of instructor-led courses for which you can register; a Knowledge Base for self-serve Technical Support, FAQs, Product Documentation, Help Files, Quick Tips and more; Training location information; and, a link to the GREC CE Credit Check.
- NewsRoom a collection of articles to keep members abreast of what's happening at FMLS, in the local and national real estate markets, as well as an archive of recent articles for quick reference.
- My FMLS use this tool to change your FMLS password, to update your Roster Information, and to see a list of classes for which you are currently registered or have recently completed.
- Broker Tools new and especially for Brokers, this page will provide access to New Member Kits, Listing Syndication information, Broker Insights, and statistical tools.
- Live Chat provides fast and easy response to your FMLS questions.
- **4 Story Carousel** features 3 major stories of interest to FMLS members.
- **Event Calendar** provides a monthly list of scheduled FMLS classes, and in a separate area, information on events of interest to FMLS members.
- **6** Widget Bar here you'll find a section to answer your most frequently asked questions, a video section to spotlight items of interest, and a tool to help you become a Friend of FMLS on Facebook!
- **7 Trending Now** videos here will provide more information on popular FMLS.com content.



#### Logging in to Fusion

You can access Fusion directly from the FMLS.com home page, click on the link for Fusion.





If this is your first login to Fusion, you will be asked to register before logging in. Type your email address in the box provided, and then click on **OK**. This is a one-time registration. You will not be prompted again for your email address.

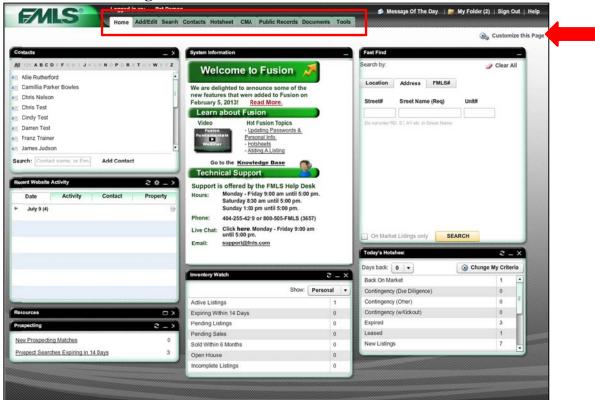


Fusion requires Adobe Flash Player 10.2 or later. You can download Adobe Flash at www.adobe.com for free! Flash Player does not currently run in 64-bit browsers. If you are using a 64-bit operating system, you must launch Fusion in a 32-bit browser. More information about Flash Player on 64-bit operating systems can be found on Adobe's website.



#### **Fusion Home Page**

The home page is comprised of nine **Navigation Tabs** at the top of the page and nine **Gadgets**. You will use the tabs to perform actions within Fusion and the gadgets to access useful information and Fusion functions. The Home Page can be customized by clicking on **Customize this Page**.



#### **Navigation Tabs**

The navigation tabs at the top of the Fusion home page enable you to move from section to section within Fusion. Descriptions for each tab follow.

Home	Returns you to the home page for Fusion and will display your gadgets.
Add/Edit	Provides quick access to the Add/Edit program and to Georgia Open Houses.
Search	Choices for property types appear here as well as access to the Search Manager and Member or Office searches.
Contacts	Provides quick access to the Contact Manager and to a quick screen for adding a new contact.
Hotsheet	Provides access to all Fusion Hotsheets: Daysback, Personal, Previous Personal, Date Range, and Custom.
CMA	Shows a list of CMAs created and saved over the past year.
Public Records	Provides quick access to the Realist tax program.



Documents	Provides quick access to the Document Manager, DocuPro, and to FormsPro.
Tools	Provides quick access to Settings, where you have access to Contact Website settings, Email Preferences, image management, Email Templates.

#### **Gadgets**

Gadgets are panels on the Fusion home page that provide quick access to useful information and Fusion functions. Gadgets can be dragged and dropped to other locations or removed entirely if not needed. You will be able to customize your Fusion home page to suit your preferences.

#### The System Information Gadget

In the center of your screen, the System Information gadget shows important information about FMLS Support, Events, and Updates. The System Information gadget is locked into place. It cannot be removed from the Home Page nor moved to another location on the Home Page.

Please make it a habit to read the information in this section regularly!



#### The Recent Website Activity Gadget

The Recent Website Activity gadget notifies you when a client uses his Contact Website to mark a property as a Favorite, a Possibility, or a Reject, or makes a note about a property. You may choose to receive an email notification of the activity as well (or receive only email notifications). Settings may be set to view notifications for the current day; the previous day and the current day; the last 3 days; the last week; or the last 2 weeks.



Click the tab to see the activity by the desired view. Click the ▶ to expand the entry and view the items underneath.

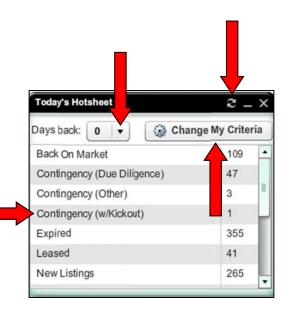


#### **Today's Hotsheet Gadget**

Today's Hotsheet gadget displays information on listings that are new to the database, or have changed in status or price since midnight.

To view a list of the referenced properties click on the Status line for those properties. To view listings from 1 or 2 days back, click on the **Days Back pick list arrow** and choose 1 or 2 days. To refresh the list, click on the refresh button on the black title bar.

The criteria for the search can be changed by clicking on the **Change My Criteria** button – areas, statuses or property types may be changed.



#### **The Inventory Watch Gadget**

The Inventory Watch gadget displays inventory counts for you, your office, and your firm.

#### To view inventory:

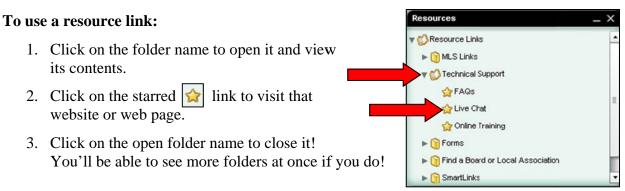
- 1. Use the drop down arrow to choose the desired filter: Personal, My Office, or My Firm. Information will be displayed for the selected filter.
- 2. If desired, click on any of the line items to see a list of properties (such as Expiring Within 14 Days, Pending Sales, etc.).





#### **The Resources Gadget**

The Resources gadget provides links to other useful websites or web pages. The links are organized into folders which include MLS Links, Technical Support, Forms, Board/Local Associations, and Smart Links.



#### The Prospecting Gadget

The Prospecting – displays a summary of matches found for Contact Websites, and links to the Saved Search Manager for quick and easy viewing of the matches.

To view prospect matches, click on the **New Prospecting Matches** link.



To view Searches that will expire in the next 14 days, click on the **Prospect Searches Expiring in 14 Days** link.





#### **The Contacts Gadget**

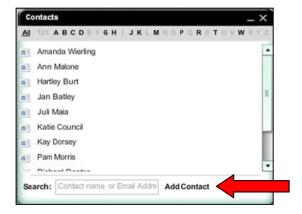
The Contacts gadget enables you to manage your contact list from the Home page.

#### To add a Contact:

- 1. Click on Add Contact.
- 2. Complete the information in the Add A Contact screen.
- 3. Click Save.

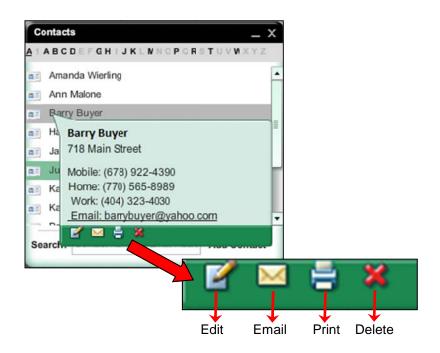


You may also click on Add New Contact from the Contacts tab at the top of the screen.



#### To work with a Contact:

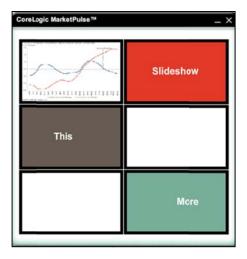
Use the icons on the green toolbar at the bottom of the rolodex card to edit, email, print or delete the contact.





#### The Corelogic MarketPulse Gadget

MarketPulse is a monthly publication made available by Corelogic, a leading provider of analytics. Information in the report includes insight into the health of the U.S. economy with emphasis on housing and mortgage metrics.



#### The Fast Find Gadget

The Fast Find gadget enables you to perform searches from the Home page. Three tabs are provided so that you can search by:

- Location (city/zip code/address/ intersection)
- Address
- FMLS#

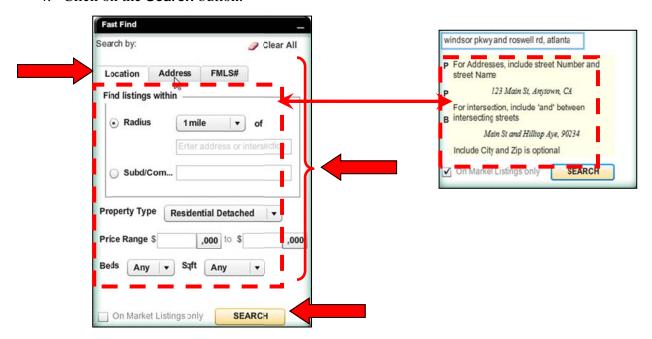


By default, the **Show On Market Listings Only** box is checked. This means that the property results will contain only listings that are Active or Contingent. Unchecking the box will return property results that include Sold, Expired, Withdrawn or Pending statuses.

#### To search by location:



- 1. Click on the **Location** tab in the Fast Find gadget.
- 2. Type a city, zip code, address, or intersection in the box provided (this is a required field).
- 3. Enter criteria in the Property Type, Beds, Price Range and Sqft fields as desired.
- 4. Click on the **Search** button.





When you click in the location box to type a city, intersection, etc., a help box will pop up directly underneath where you are typing to provide examples of what is acceptable in the field. This box will disappear when you use the **tab** key to move to the next field on the Location tab.

#### To search by address:

- 1. Click on the **Address** tab in the Fast Find gadget.
- Type an address in the box provided (a street number is not required, but the street name is a required field).
   Do not enter a street type (Street, Road, etc.).
- 3. Click on the **Search** button.





#### To search by FMLS #:

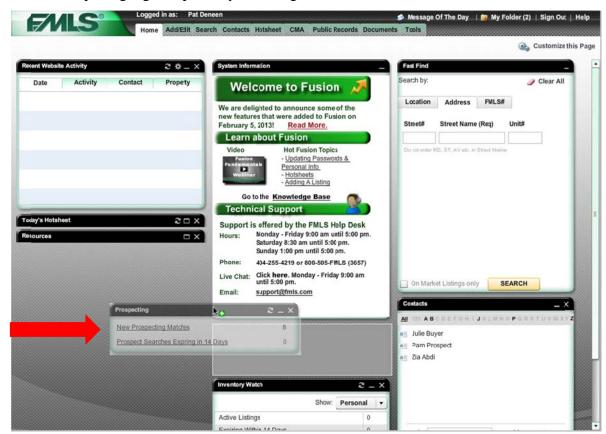
- 1. Click on the **FMLS#** tab in the Fast Find gadget.
- 2. Type one or more FMLS #s in the box provided (separate multiple numbers with commas).
- 3. Click on the **Search** button.



#### **Moving Gadgets**

#### To move gadgets on the Home page:

- 1. Hover over the title bar of the gadget to be moved.
- 2. Click and hold the left mouse button.
- 3. Drag the gadget to the desired location on the Home page.
- 4. Drop the gadget in place by releasing the left mouse button.





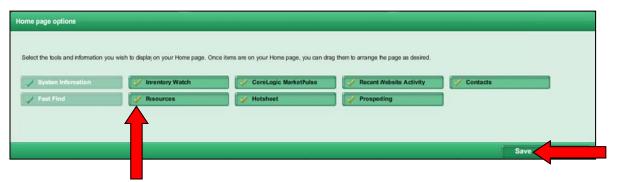
#### **Removing/Restoring Gadgets**

To remove a gadget on the Home page:

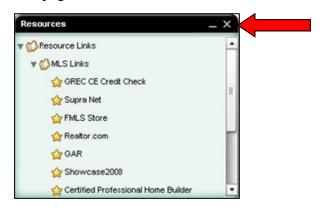
1. Click on Customize the Page.



2. Click on the check mark next to the gadget you wish to remove (the check mark will disappear).



- 3. Click on the **Save** button. The gadget is removed from your Home page.
- 4. Alternatively, you can click on the **Close** button in the gadget's title bar to remove it from your Home page.





#### To Restore a Gadget to the Home Page:

To restore a gadget to the Home Page, click on **Customize this Page**, then click to place a check in the box next to the gadget you wish to restore. Click on the **Save** button to finish.



You may want to consider minimizing a gadget that you use infrequently, rather than completely removing it from your Home Page. To minimize a gadget, click on the Minimize button in the gadget's title bar. Clicking on the Maximize button will re-open it for use.





The System Information Gadget and the Fast Find Gadget cannot be removed from the Fusion Home Page. Both are locked in place.

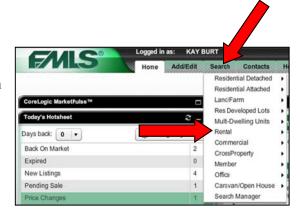


#### **Navigating the Full Search Screen**

In Fusion you can search on any field found in the Agent Full Report. The Full Search tool encompasses the most commonly used criteria, and allows you to search for properties based on very specific criteria.

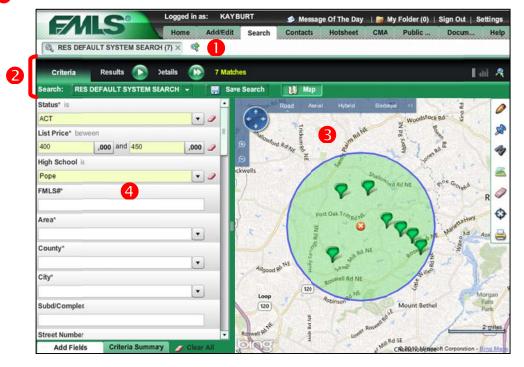
#### To access the Fusion Full Search screen:

- 1. Hover over the **Search** tab.
- 2. Click on the appropriate property type from the drop down list.



The Search screen contains the Criteria panel, and the Search Task Bar that you will use to conduct searches and view matching properties. You will create and save new searches here, as well as load saved custom searches and system searches. It consists of:

- Searches Bar
- 2 Search Task Bar
- Interactive Map
- Search Criteria Panel





#### The Searches Bar

Fusion provides the ability to have up to 10 searches open simultaneously. While working with one search, you can start one or more new searches and have all of them open and accessible at the same time. The title of each search and the number of listings it returned appear in the searches bar, beneath the navigation tab.



Each of your open searches stays available as long as your Fusion session is active. If you go to another Fusion module, such as the Home tab, and then come back to the Search module, your open searches will still be ready and waiting for you. All searches will remain open until you either close them, or until you log off.

#### To switch between open searches:

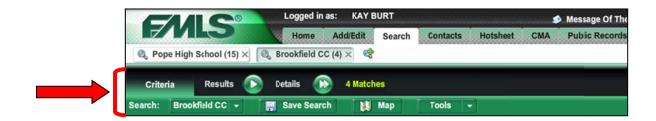
Click on the search tab you want to view.

#### To close an open search:

- Hover over the X in the search tab until it changes to red.
- Click on the **X** to close.

#### The Search Task Bar

The Search Task Bar has two sections. The larger black bar provides buttons for choosing Criteria, viewing search Results, viewing property Details, and displays the number of listings that match your search criteria. The smaller green bar contains a drop down for Saved Searches, the Save Search button, the Map toggle button and the Tools drop down.





#### The Interactive Map

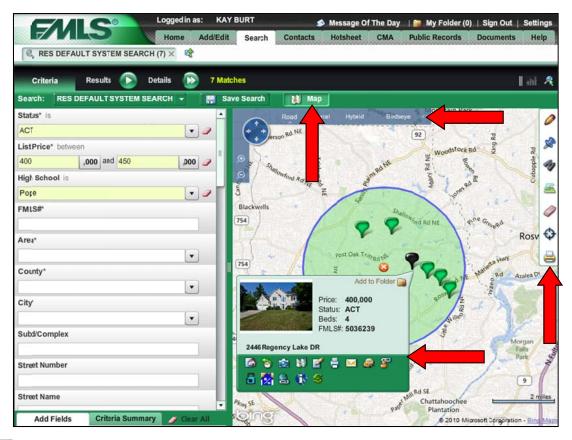
The Fusion map displays listings returned by search criteria and enables you to create mapbased searches. Two panels provide controls for manipulating the map.

Map Button – closes or opens the map with one click!

**Map View Control Panel** – enables you to change the view from Road to Aerial to Hybrid to Birdseye. It also provides tools for zooming in, and zooming out.

Map Tools Panel – enables you to draw areas on the map within which to conduct a search. Shapes include Circle, Rectangle and Polygon. A Locator button is available to center the map on a particular address, business or listing. The Map Tool Panel also provides an overlay button which will show city, county, FMLS Areas, Neighborhoods and School district boundaries on the map! Another choice on the panel will place points of interest on the map such as banks, restaurants, gas stations, libraries, shopping, and more!

**Mini-Report** – hovering over a pin on the map will produce a small thumb nail report of the property. Clicking on the photo will open the photo gallery for viewing of all property photos; clicking on the icons on the green bar at the bottom of the report enables you to email, print, view tax information, etc. for the property.



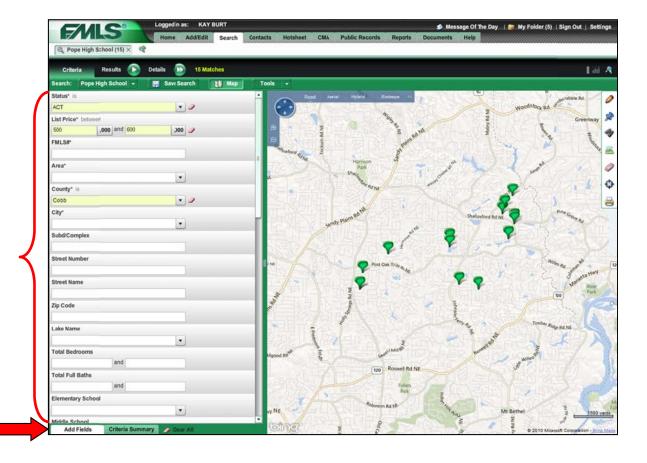


Multiple shapes may be drawn on a single map for even greater flexibility when searching. Combine circles with polygons with rectangles to find exactly the right property in the exact location your client wants. Shapes can even overlap on the map!



#### 4 The Search Criteria Panel

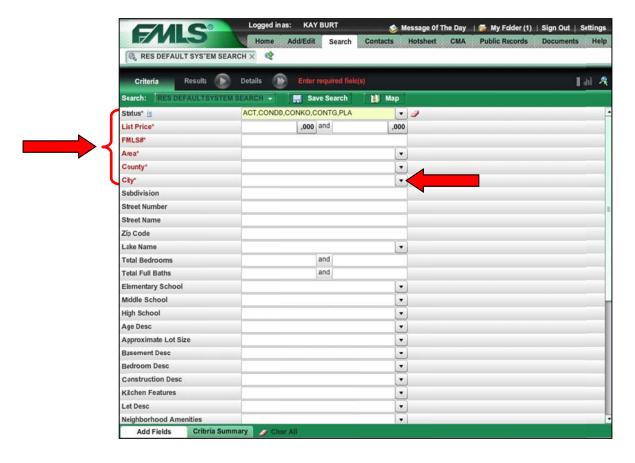
Use the Search Criteria Panel to specify the criteria for a search. Many of the search fields have lists from which you can choose criteria, others have "between" boxes so that you can specify ranges, and still others are available for you to type specific information. Use the scroll bar at the right side of the panel to view the entire default list of search fields.





#### Performing a Search

To find properties for your buying clients, type your criteria in the fields provided, or choose from a drop down list of choices associated with some fields. As you tab from one field to another, you will notice that Fusion provides a running total of matches for that criteria. If you have the map open on the screen, you will also notice that pins are added to the map showing the location of each of the matches.



**Required Fields** - As you begin your search in Fusion, you will notice that there are several required fields (Status, List Price, FMLS#, Area, County, and City). The Status field must be used in every Fusion search. You will need to select at least 1 other required field in order to perform a search. When you type data into one of the five red fields, the other 4 will become black, and you may use them if desired, but they are no longer considered required.

**Customizing the Search Panel** - Search fields can be dragged and dropped anywhere in the Search Criteria Panel. You may find it helpful to have the criteria fields you've used together at the top of the screen – especially if you are creating a default set of fields for your own personal default list.



**Add Fields** – The search fields presented when you begin a search in Fusion are a default list. Many other choices are available. Use the **Add Fields** tab to add a field to the viewable list.



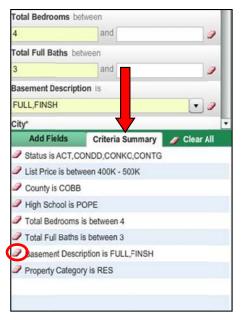
Click the arrow next to the field to open a list of choices. Scroll to select.

Click the **Add Field** button. The new field is added to the bottom of the Search Criteria screen.



Criteria Summary - You can use the Criteria Summary tab at the bottom of the Search Criteria Panel to see a list of your criteria – and use it to immediately jump your cursor to a particular field by clicking on that field name. Use the eraser icon at the left of a criterion to remove it from your search.

**Clear All** – Use the **Clear All** tab to erase information in ALL fields on the Search Panel.

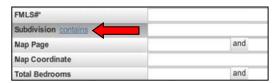




#### **Using Field Operators**

Each field in the Search Criteria panel contains operators, or qualifiers. The Operators determine how Fusion uses the data you type into that field and will further refine your search.

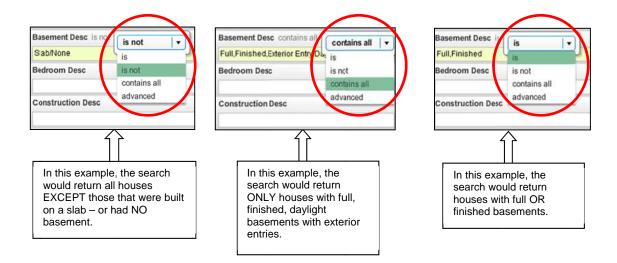
Field Operator choices include is, is not, contains, contains all, between, or less, or more, etc., as well as advanced.



For fields that do not yet contain criteria, hover your mouse over the field name box to display the operator.



For fields that already contain data, the operator appears next to the name of the field.



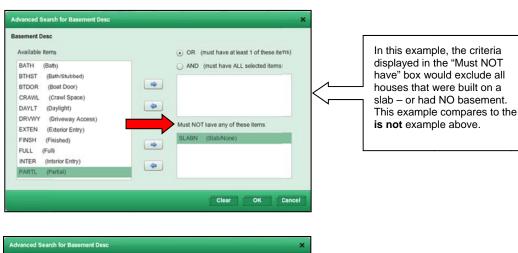


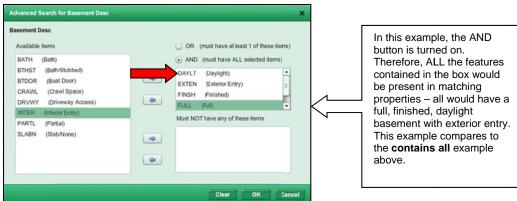
# **The Advanced Operator**

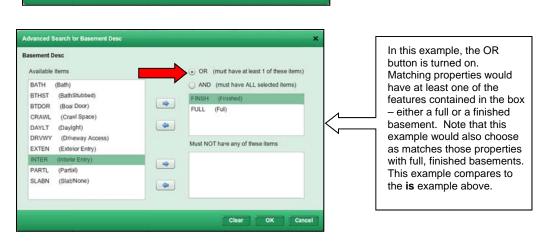
Using the **Advanced** field operator provides an easy way to see and understand the choices available for filtering results using a particular field. It also provides the ability to **include** specific features and **exclude** features at the same time!



Find the **advanced** operator choice at the bottom of the pick list for any field!

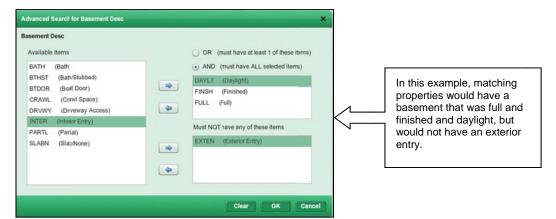






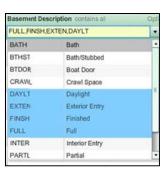


The Advanced field operator is very flexible. You can set a field to **include** certain features and **exclude** other features at the same time!





In fields where you need to choose more than one item from a list, it is not necessary to hold down the CTRL key to select or deselect.





Rather than choosing what you want in a field, try choosing only what you **don't** want. For example, if your client wants to live in any subdivision in the Walton High School district **except** Indian Hills Country Club, type Indian Hills in the Subdivision field and then choose **is not**. Now your search results will **exclude** properties that are in Indian Hills.





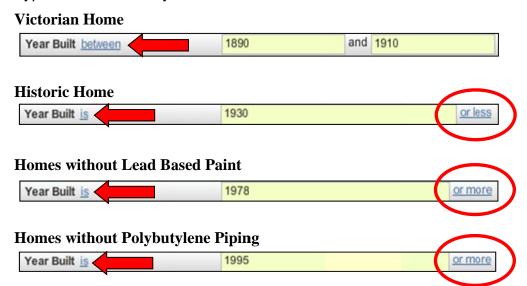
### **Overlooked Fields**

With over 150 fields available for entering search criteria, it is easy to miss fields that can be huge time savers in the course of a single day! Some often overlooked fields include:

#### **Year Built Operators**

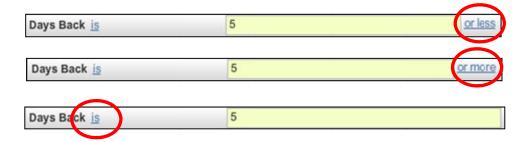
Using the operators in the **Year Built** field gives you the flexibility to hone in on homes of a certain age, or to eliminate homes built before or after a particular date.

Type of home the Buyer wants:



### **Days Back Operators**

The Days Back search allows users to search for **Active** listings with specific criteria that have been listed, had a price change, or gone back on the market within the past 30 Days. Operators are available for the field that will provide various ways to express the period of time you want to consider in the search.





#### **Subdivision and Street Name Operators**

The Fusion database works on exact matches. If a Listing Agent is not careful when entering a subdivision or street name, it can be difficult for a Buyer's Agent to find all available properties in that subdivision or on that street. For instance, if a Buyer's Agent is searching for properties in the "St Ives" subdivision, properties listed in "Saint Ives" would not be included in Search Results. Similarly, if a Buyer's Agent is searching for properties on "Mt Vernon", properties listed on "Mount Vernon" would not be included in Search Results.

Using the **Contains All** operator will enable Buyer's Agents to locate all properties in a subdivision or on a street using only portions of the proper spelling. In the subdivision example above, the letter "S" would be used along with "Ives" and the **Contains All** operator to find all properties in St Ives.



Using the **Contains** operator in the Subdivision can produce interesting results, too! For example:

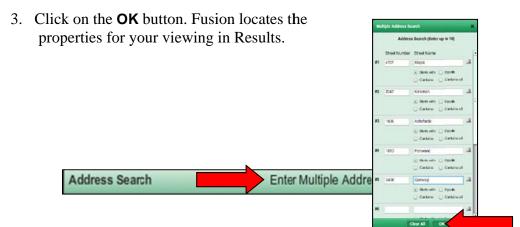


Will return properties in Apalachee Woods, Apalachee Station, The Oaks At Apalachee, Sterling Green at Apalachee, and any other subdivision with Apalachee in the name.

#### **Address Search**

Fusion's Address Search field provides the ability to search for up to 10 addresses at once.

- 1. Click on Enter Multiple Addresses.
- 2. Use the popup box to enter up to 10 addresses.





#### **Public and Private Remarks**

The **Private Remarks and Public Remarks** fields can be used along with operators to locate properties that may be of interest based on specific comments such as foreclosure, short sale, renovation, Broker bonus, etc.

Private Remarks - Members Only contains renovat

Will return properties with "renovation", "renovated", or "renovate" in the Private or Public Remarks section.

#### **Special Circumstances**

The **Special Circumstances** field can be used to find properties that are unique in terms of condition, ownership, etc. The following criterion is searchable under the Special Circumstances field:

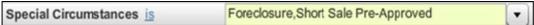
Agent Related to Seller Lease Purchase Active Adult Community Lender Owned

Cert. Prof. Home Bldr. No disclosures from Seller Corporate Owner Owner Will Consider Exchange

Estate Owned Owner Transferred
Fixer Upper Owner/Agent
Foreclosure Potential Short Sale
Government Owned Recently Renovated
Historical Short Sale Pre-Approved

HUD Listing Sold As/Is

**Investor Owned** 



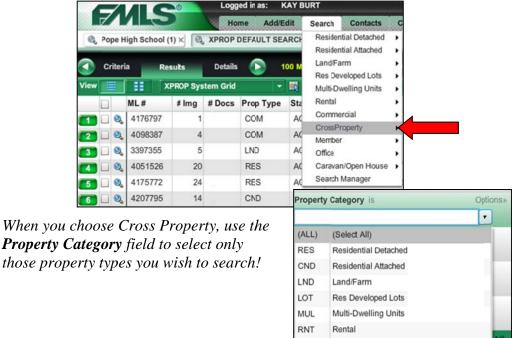
Will return properties with "foreclosure OR short sale preapproved in the Special Circumstances field.

Add Field



### **Cross Property**

Choosing a particular property type (Residential Detached, Residential Attached, Rental) limits property matches to that type only. Fusion has a fix for that! A special search type enables you to search across property types. It is the Cross Property search!



COM

Address Search

Commercial



When you choose Cross Property, use the **Property Category** field to select only



# **Running Multiple Searches**

Fusion gives you the ability to have multiple searches (as many as 10) open simultaneously. While working with one search you can start one or more new ones and have all your searches open and accessible at once. The title of each search and the number of listings each returned appears in the Searches bar beneath the navigation tabs. The open searches will remain active as long as your session is active – even if you go to another Fusion module such as the Home tab.

To open a new RES DETACHED search:

- 1. Click on the green plus sign on the Searches toolbar ( ). A new search opens.
- 2. Enter your criteria as needed.

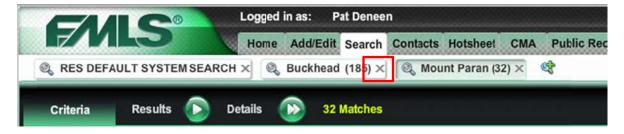




Hover over the Search tab and click on a property type to start a new search for a different property type.

# **Closing Searches**

To close a search, click the small **X** next to the search name.





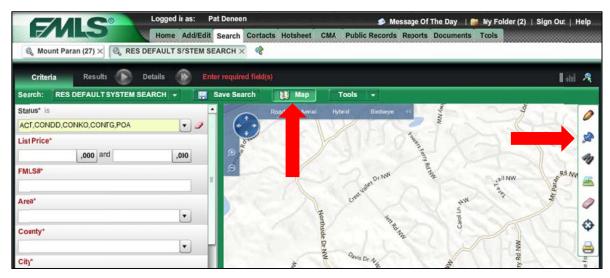
# **Using the Fusion Map**

The interactive map is one of Fusion's most powerful tools. Not only will the map show the location of property matches for a set of search criteria, it also allows you to locate an address or business on the map; display boundary lines such as city, county, neighborhood, school district, and FMLS areas. You'll also be able to display points of interest such as banking, fire and police, libraries, shopping, and many more. In addition, rectangles, circles and polygons may be drawn on a Fusion map to further define search criteria to a very specific geographic area.

# **Using the Locator Tool**

#### To use the Locator tool:

- 1. Click on the **Map** button to turn on the Fusion map.
- 2. Click on the **push pen** icon in the map toolbox to open the Locator tool.



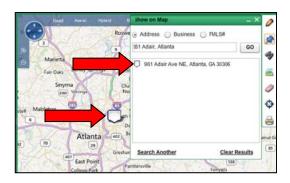
- 3. Click to choose address, business or FMLS #.
- 4. Type an address, a business name or an FMLS # in the box.
- 5. Click on the **Go** button.





If an exact match for your criteria is located, it will be pinned on the map. Click on the push pen icon again to close the criteria box.

If more than one match is located, choices will be displayed in a list. Click on the desired location to finish.

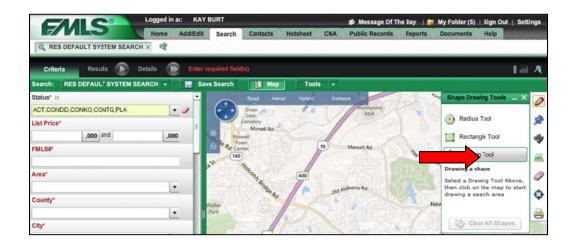




# **Using the Search by Map Feature**

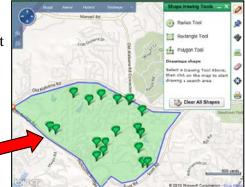
### To use the Search By Map feature:

- 1. Display the desired area on the map (use the locator tool or zoom and move the map to a desired location).
- 2. Click on the **Pencil** icon in the map toolbox to open Drawing Tools.
- 3. Click to select the desired shape (circle, rectangle, or polygon).

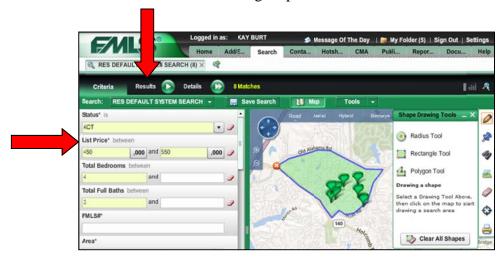




- 4. Move the mouse pointer onto the map.
- 5. Click and release the left mouse button for the first point. Move to the second point then click and release the left mouse button again. Continue clicking, releasing and moving the mouse until the shape is complete.

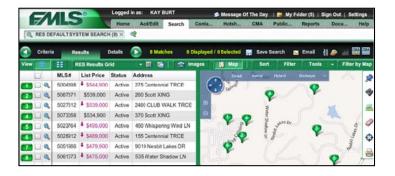


- 6. Add any other desired criteria in the search panel.
- 7. Click on **Results** to continue using map features.



The Results screen will show matching properties with numbered map pins that correspond to the property number in the list.

8. Click on the **Map** button again to add the map to your Results screen.





## **Using the Map Overlay**

The Fusion Interactive Map provides overlays that will show City, County, FMLS areas (lines or shaded), Neighborhoods, Parcels and School Districts.

#### To use the Map Overlay feature:

- 1. Click on the **Overlay** icon in the map toolbox.
- 2. Place a check in the box(es) to display a boundary on the map.



## **Using Points of Interest**

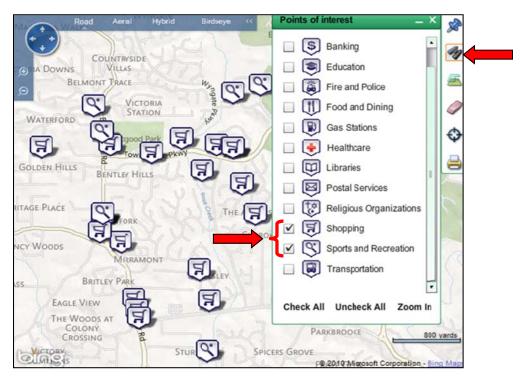
You can display points of interest on the Fusion map. Included categories are Arts & Entertainment, Banking, Education, Fire and Police, Food and Dining, Gas Stations, Healthcare, Libraries, Postal Services, Religious Organizations, Shopping, Sports and Recreation, and Transportation.

#### To use the Points of Interest tool:

- 1. Display the desired area on the map (use the locator tool or zoom and move the map to a desired location).
- 2. Click on the **Binoculars** icon in the map toolbox to open Points of Interest.

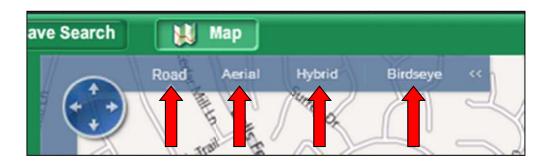


3. Click to select the desired categories.

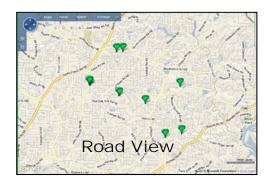


The map view can be changed to Road, Aerial, Hybrid or Birdseye views; and zoom in/zoom out buttons provide flexibility when working with the map.

To change map view, click on the desired view on the menu. The map view changes.















# **Saving Fusion Searches**

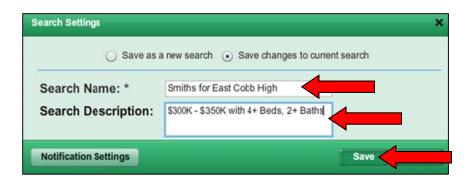
With Fusion you can save searches for clients whose needs are so specific that you are unlikely to find property matches quickly. When the search has been saved, you can call it up again and again until you find just the right home for your buyer. You can also save searches to make your job easier in other areas such as farming.

#### To save a search:

- 1. Build the search using the criteria of your choice.
- 2. Click on the **Save Search** button.



- 3. In the Search Settings box, type a name for the search and any description you desire.
- 4. Click on the **Save** button.



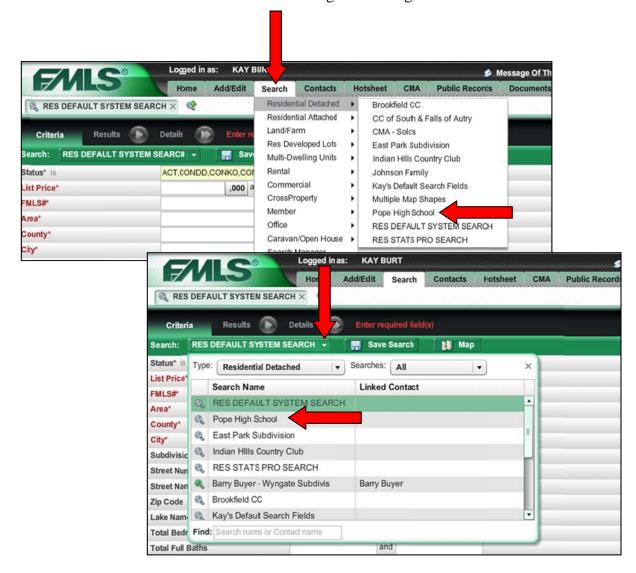
#### To open a saved search:

- 1. Hover over the appropriate Property Type on the Search tab, a list of saved searches appears.
- 2. Click on the name of the search in the box to the right.



#### OR

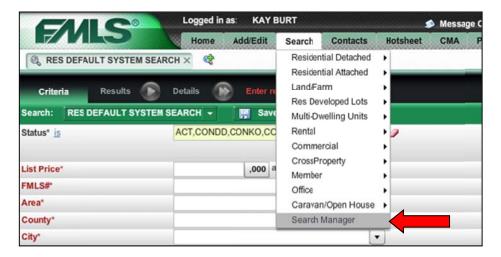
- 3. Use the pick list on the Search toolbar.
- 4. Click on the name of the search to run it again and again!



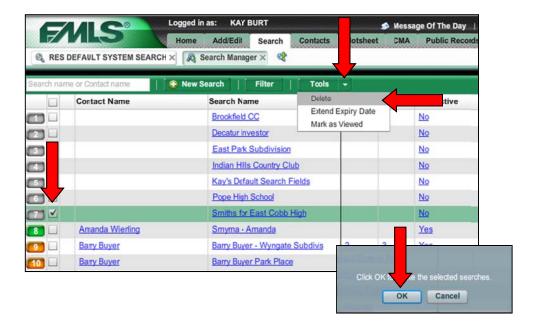


#### To delete a search:

1. Select **Search Manager** from the Search tab drop down menu.



- 2. Place a check mark in the box for the search to be deleted.
- 3. From the **Tools** pick list, click on **Delete**.
- 4. Click **OK** to confirm the deletion. The search is deleted and removed from your list of searches.



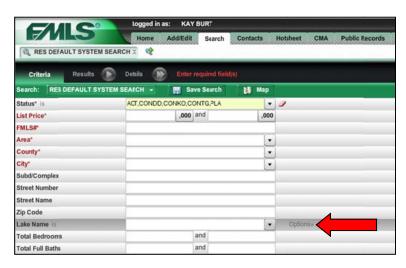


#### **Customized and Default Search Panels**

Take advantage of Saved Searches to create a customized search panel for yourself! Remove fields you rarely use from the default list, add fields you regularly use that are not already there, then drag and drop the fields in the order you want them to appear each time you search in Fusion. Then save the search with empty fields. You can even use it as the default search panel so that each time you click on Residential Detached (or Residential Attached, or Rental, etc.) you'll get your custom panel.

### To remove fields from a search panel:

- 1. Hover over the field you wish to remove from the search panel.
- 2. Click on the **Options** button.



3. Click on Remove this Field.





The field is removed from the search panel.

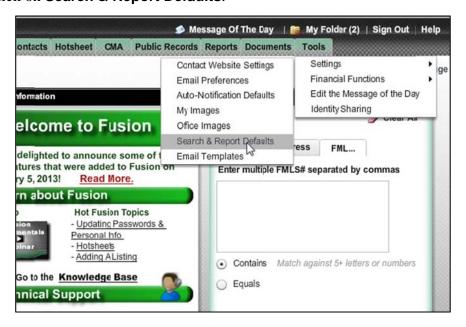




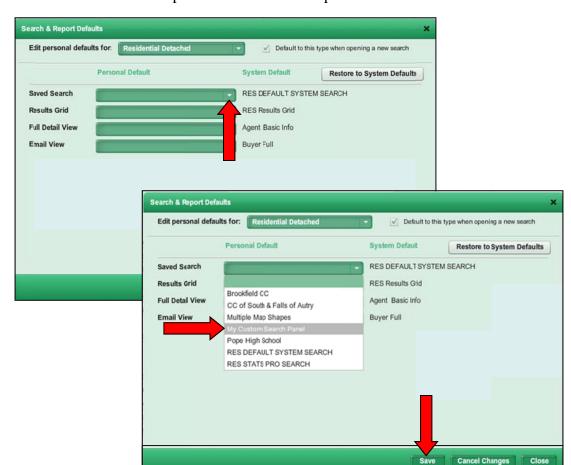
Any field may be removed with the exception of the Required Fields (Status, List Price, FMLS#, Area, County, City).

#### To set a saved search as the Fusion default search panel:

- 1. Hover over the **Tools** button. A drop down list appears.
- 2. Hover over **Settings**. A drop down list appears.
- 3. Click on Search & Report Defaults.







The Search & Report Defaults window opens.

- 4. Click on the **pick list arrow** for Res Default System Search.
- 5. Click on the previously saved search you wish to make the default for Fusion Searches.
- 6. Click on the **Save** button.



The search panel is **only** changed for the property type in the box at the top of the Search & Report Defaults window.

To set defaults for other property types, create and save a custom panel for each property type, then return to the Search & Report Defaults window and repeat steps 4-6 above after changing the property type in the top box.





# Working with Results

The search results screen displays properties returned by a search. You can view results in a grid, in a thumbnail gallery, or on a map. The search results screen offers many ways to sort, filter, and organize your search results, as well as print and email listing information.

### The Grid View

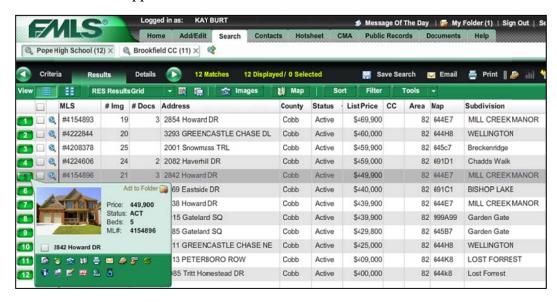
Listings that match your criteria will be displayed in a grid or table-like format by default. You can sort your grid on a single column, reorder columns – even create custom results grids.

### To view search results using the Grid:

- 1. Run a search from the Search Screen.
- Click on the Results button.

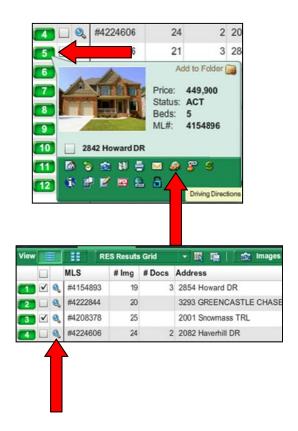


#### The Grid screen appears:





- 3. Hover over the line number for a listing to see a Mini Report. Thumbnail information for the property will be displayed including list price, status, beds and more.
- 4. A links panel is also provided for one-click access to other important information such as history, photos, email, tax information, etc. Hover over a link to see a description of its function, and then just click on the link.
- 5. Click on the magnifying glass for a listing to move to the Agent Report (Details) for that property.
- 6. Use the check box to select properties for printing, emailing or mapping for driving directions.

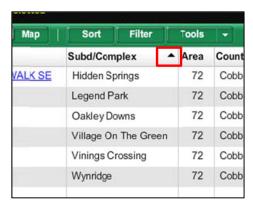


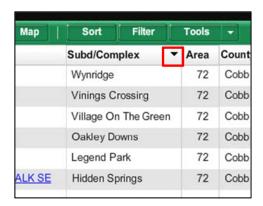
### **Sorting Search Results**

Search results in Fusion are sorted first by Status, then by List Price (highest to lowest). The list can be easily resorted using any of the columns on the Grid! For example, you may want to see your results sorted by Subdivision, or by the number of bedrooms. With the Fusion Results Grid you can reorder the list with one click!

#### To sort search results by column:

- 1. Click on the column heading for the sort order you prefer. The list will be reordered in ascending order.
- 2. Click the column header again to reverse and sort in descending order. The arrow in the column heading indicates the type of sort.



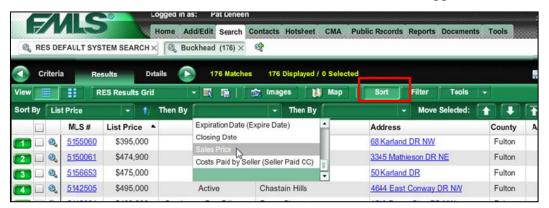




### To sort by up to 3 levels:

The grid listings may be sorted using as many as three levels.

1. Click on the **Sort** button on the View menu, the Sort Tool bar appears.

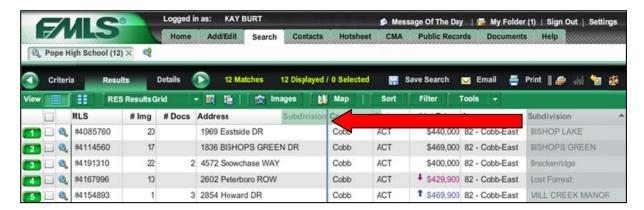


2. Choose the sort levels from the drop down boxes. The grid changes as you select the sort criteria.

## **Changing the Column Order**

You can drag and drop columns on the grid view to see information in the order you prefer.

- 1. Move the cursor to the column you want to move.
- 2. Press and hold down the left mouse button to "grab" the column.
- 3. "Drag" the column to the desired location by moving the cursor.
- 4. "Drop" the object by releasing the button.



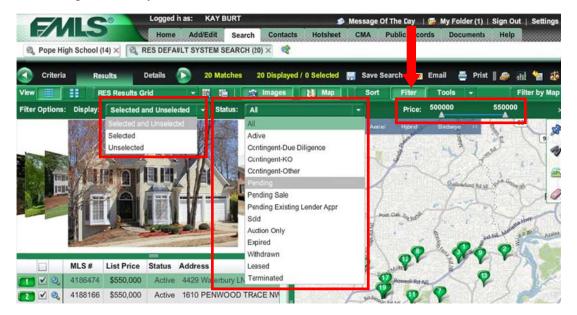


## **Filtering Search Results**

You may also choose to filter your search results as you work. Options are available to filter your list checked/unchecked selection boxes, by Status, or by price range.

#### To filter results:

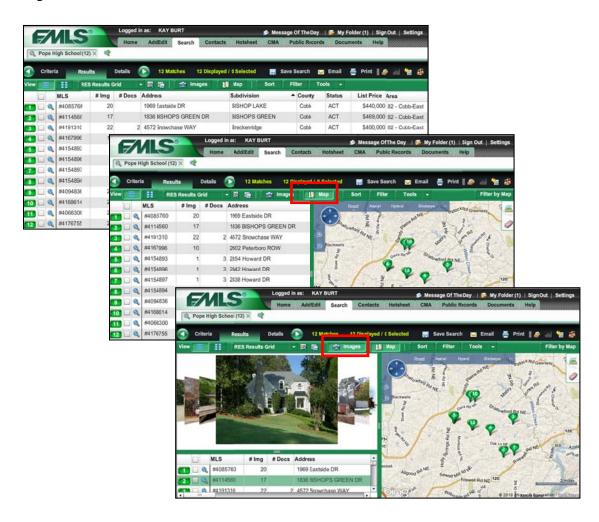
- 1. From the Results Grid (or the Gallery view), click on the **Filter** button.
- 2. Use the pick list arrows to filter by Selected, Unselected or All properties; by Status: Active, Pending, Sold, etc.; or use the Price slide bar to change the price range on the fly.





## **More Viewing Options for Results**

Combine views with the map and/or the image carousel to work exactly the way you want to work. Clicking the **Map** and/or **Images** button on the toolbar will turn the map pane and image carousel on and off.





Hovering over a pin on the map produces the Mini Report described above and temporarily changes the pin color to black.

If your search contained criteria for multiple statuses, pins on the map will differ in color according to their status.

Pin Color Codes:

Green = Active
Red = Sold
Orange = Pending
Purple = Expired
Blue = Withdrawn

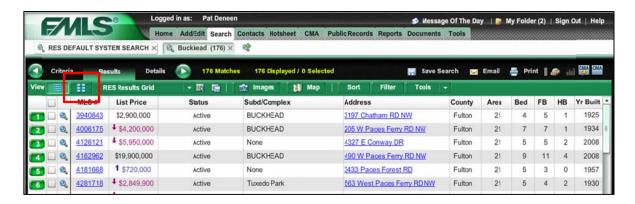


## The Gallery View

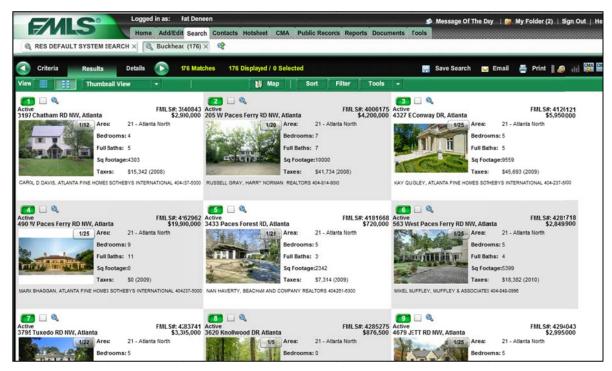
The Gallery View provides an alternate way to view the matches for your search. You will see thumbnail information for each match rather than a one-line list of matches.

#### To view search results using the Gallery view:

1. From the Results Grid, click on the **Gallery** view button.



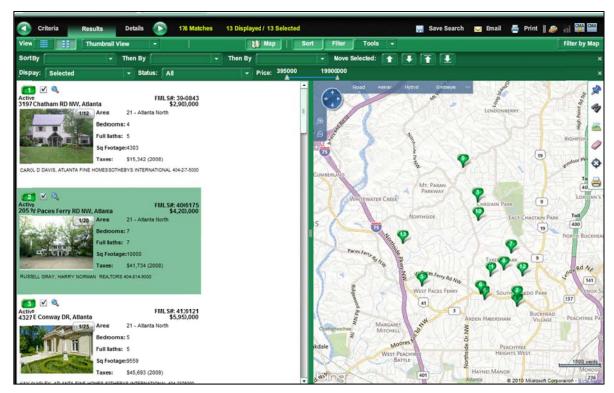
The display will change to present your matches with thumbnail images and summary information.



2. Use the button in the upper right corner of each primary photo to quickly flip through interior photos of listings. The Mini Report, check box and magnifying glass present in the Results Grid are also available in the Gallery view.



3. Click the **Map** button to add the Interactive Map to the Gallery view...

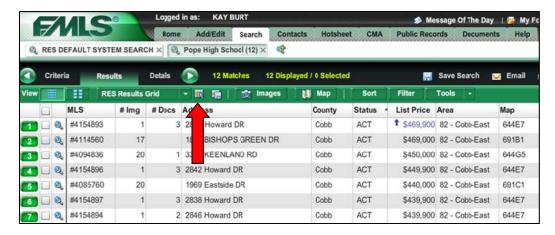


## **Creating Custom Grids**

Seeing only the information you need on a Search Results screen can save you hours of time and make your job much easier! For instance, if you've run a search for Sold properties to gather information on sale prices, days on market, and costs paid by seller in a particular area, you can create a grid in Fusion so that only the needed information will be displayed when you click the Results tab! Or, if the information on Fusion's default Search Results screen would be easier for you to read if presented in a different order, you can create a grid with the order you prefer and make it your default for viewing search results!

#### To create a custom grid:

1. From a results screen, click on the **Grid Manager** icon.

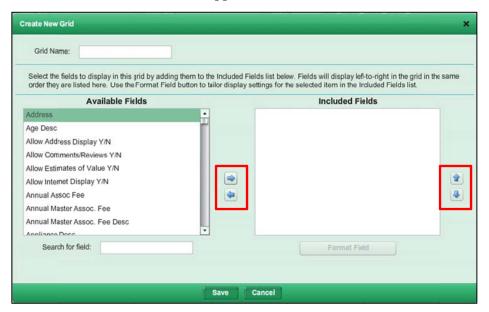




2. Click on the **Create New Grid** button to continue.



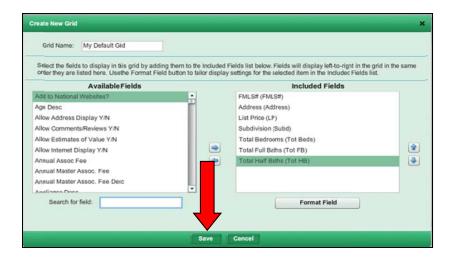
The Create New Grid window appears:



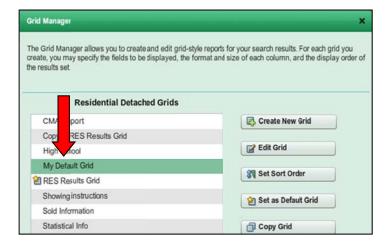
- 3. Type a name for the Results Grid in the box provided.
- 4. From the list of fields in the Available fields section, select the fields to display in this grid. Click the right arrow to move the field to the Included Fields section. Fields will display left-to-right in the grid in the same order they are listed here. Use the Format Field button to tailor display settings for the selected item in the Included Fields list.
- 5. Use the up and down arrows to the right of the Included Fields box to place the fields you've chosen in whatever order you prefer.



6. Click on the **Save** button to save your new Search Results Grid.



The new grid appears in the list.





You can use the Search for Field box to find a field quickly. Simply click in the box and begin to type the field you're searching for. The list of Available Fields will narrow to only those containing the text you've typed in the box.

Use the **Format Field** button to set column widths, text alignment in a column, and more! With Grid Manager you can truly have it your way.

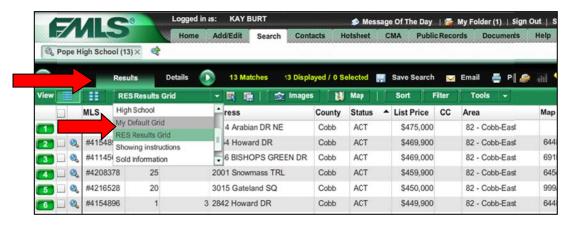
Once you have saved a grid in Fusion, it's easy to use it for any set of Search Results! You'll be pleased with the time you'll save when you can view the information you need in the order you need.



# **Using Custom Grids**

### To use a custom grid:

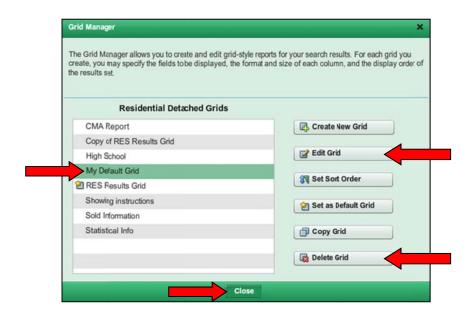
- 1. Click on the **RES Results Grid** button from any results screen.
- 2. Click on the grid of your choice. Your search results display with the fields you chose for that grid.



Your Custom Grids may be changed at any time. You may also delete grids that you no longer use.

#### To edit or delete a Custom Grid:

- 1. From the Grid Listing, click the Grid Manager button. A listing of girds appears.
- 2. Click once on the appropriate Grid to highlight it.
- 3. Click on **Edit Grid** to make changes or click on **Delete Grid** to delete the grid.





### To set a custom grid as the default for viewing results:

- 1. Hover over the **Tools** tab.
- 2. Hover over **Settings**.



- 3. Click on **Search & Report Defaults**. The Search & Report Defaults window opens.
- 4. Click on the pick list arrow for RES Results Grid.





5. Click on the custom grid you wish to make the default for viewing results in Fusion.



6. Click on the **Save** button.



The results grid is **only** changed for the property type in the box at the top of the Search & Report Defaults window.

To set defaults for other property types, create and save a custom grid for each property type, then return to the Search & Report Defaults window and repeat steps 4-6 above after changing the property type in the top box.





# **Property Details**

The Property Details page provides more detailed information for a listing than is viewable on the Results Screen. Several formats are available for Property Details including Agent Basic, Agent Full Report (One Page-No Sold Info), Agent Full Report (Two Page w/Sold Info), Agent Short Report, Buyer Full Report, Buyer Short Report and others. The Agent Full Reports contain the most information about a property. They are divided into the following sections:

- General Property Information
- Public and Private Remarks
- Features
- Other Descriptive Information
- Legal, Financial & Tax Information
- Office Information
- Sold Information [This section is available only on the Agent Basic and the Agent w/Sold (2 pg) Report and will begin to populate as the property goes under contract.]

In addition to the viewable information in the Agent Full Report a Links panel is provided at the left which offers a number of links to additional information such as history, tax data, demographic information, Georgia Open Houses, driving directions, and more. This information will be displayed in new windows on your screen.

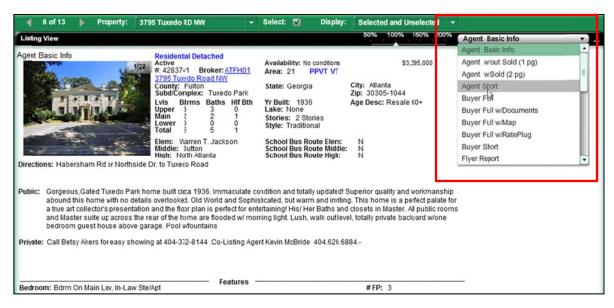




1. Click on **Customize this Page** to add Photos and a Map to the bottom of the details screen in separate panels. You can also rearrange the panels to suit your preferences. Panels expand and collapse to make the best use of available screen space.



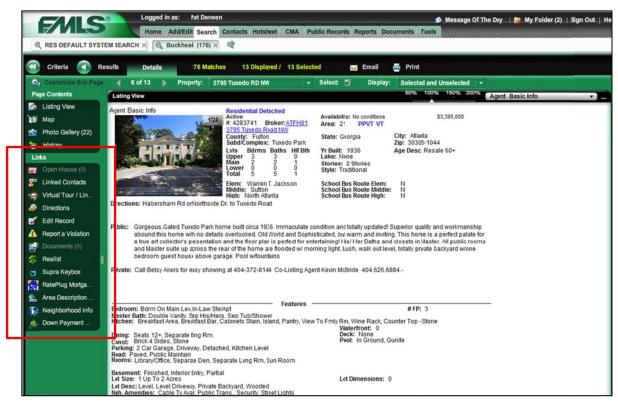
2. Use the grey drop down box to choose different report formats for viewing property information.





# **Using the Links Panel**

The links panel on the left side of the screen provides you with quick links to various related items to the listing you have displayed on the screen. For example, to see driving directions, click the Driving Directions link. Each link is covered in detail on the following pages.



# **Photo Gallery Link**

- 1. To view the property photos, click on the **Photo Gallery** link. All property photos are displayed in a separate window.
- 2. Click on an image in the gallery to enlarge it.
  - Result: All property photos are displayed in a photo gallery. Photo descriptions are located at the bottom of the window.
- 3. Use the **X** in the upper right corner of the Photo Gallery to close the window. If descriptions of the pictures are available they will appear at the bottom of the Photo Gallery box.







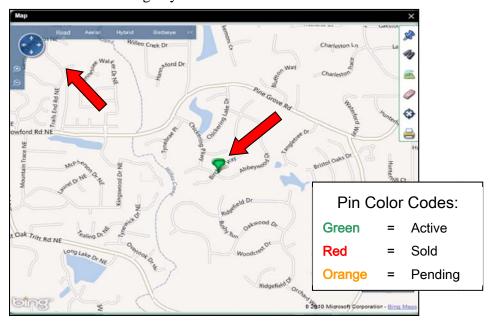
Click once on the large photo in the Photo Gallery to bring up a film strip that will present the photos in an even larger size. Use the **Next** and **Previous** buttons to move through the photos. Click on the green **X** to close the film strip.



# **Map Link**

To view the property on a map, click on the **Map** link.

A new window opens with a map containing the listing. The listing appears as a "pin" on the map. Pins are color-coded by Status: Green Red, Orange or Purple. See the chart below for the color coding key.

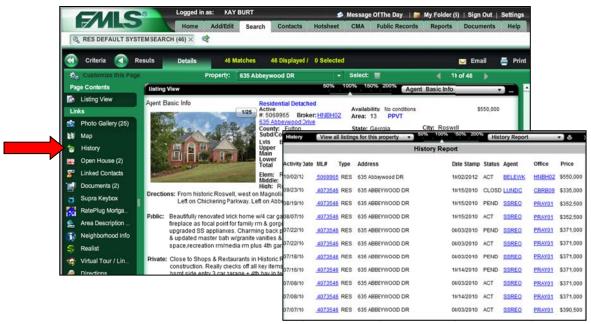




Tool bars at the top and left of the Map display enable you to change the view from Road to Aerial to Hybrid and to zoom in or out on the map.

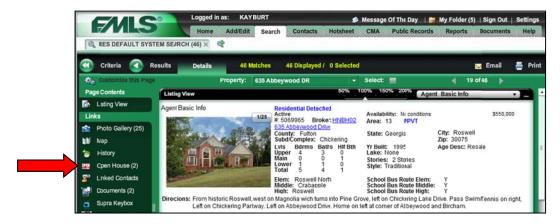
## **History Link**

History provides the listing history of the property based on an address match. When applicable, you're able to view the property's different listing numbers, statuses and prices.



## **Open House Link**

The Open House link provides information on any open house scheduled for the property through GeorgiaOpenHouses.com.





## **Linked Contacts Link**

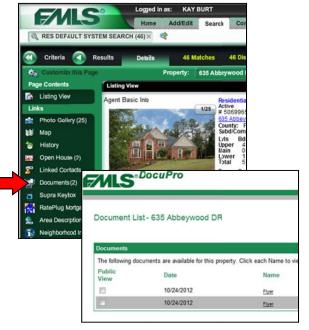
Linked Contacts enables you to quickly send a listing to a client's Contact Website as a recommended property.

Learn more about the Contact Website and linking contacts in the **Fusion Advanced** class.



## **Documents Link**

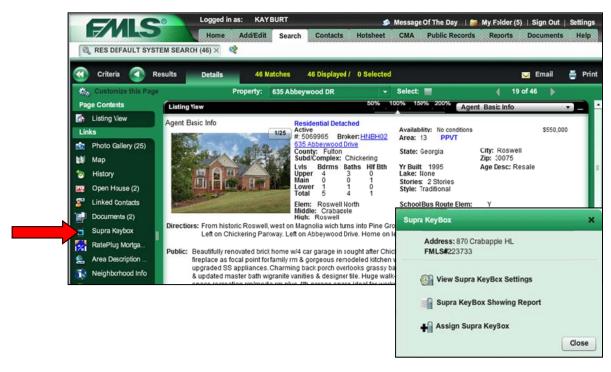
Documents provides access to information about the listing provided by the listing agent, such as a Seller's Property Disclosure Statement, a Lead Based Paint Exhibit, a plat map, etc. If a listing has no documents attached to it, the Documents link will not be clickable in the Links panel. Learn more about adding documents to a listing in the **Document Management** class.





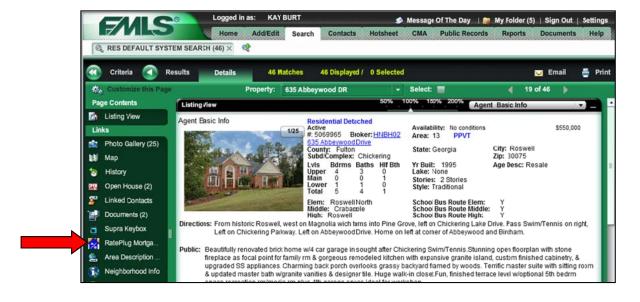
## Supra Keybox Link

This link allows the primary listing agent to assign a Supra keybox to the active listing and view/print the Supra KeyBox Showing Report. It also allows other agents to view Supra KeyBox settings.



# RatePlug Mortgage Info Link

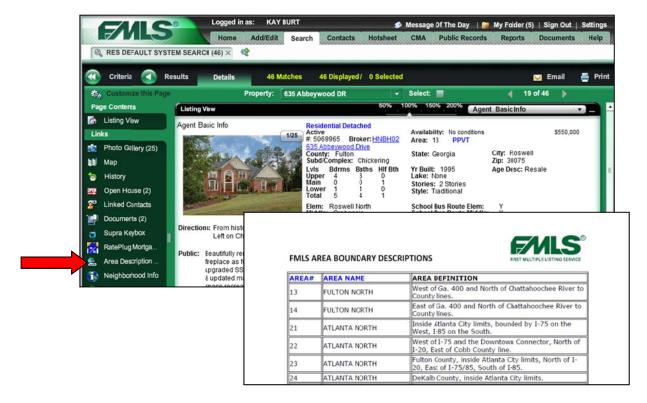
RatePlug shows live mortgage payment and product information for up to 3 preferred Lenders if the property is emailed using the Buyer Full w/Rate Plug report format. Not all Brokers/Agents will choose to provide this information.





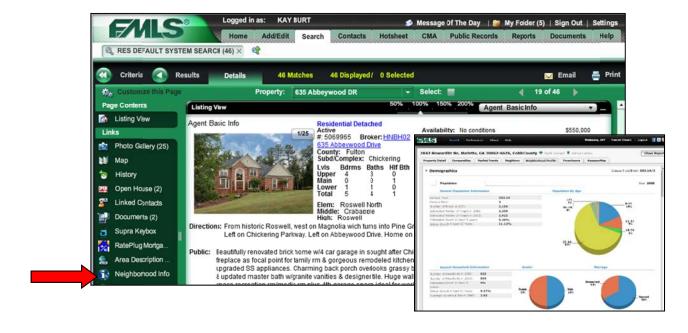
## **Area Description Link**

Area Description will provide a written description of each FMLS area.



# **Neighborhood Info Link**

The Neighborhood Info link provides property centric information for the area around the listing. The information includes demographic data, school, and local business information.



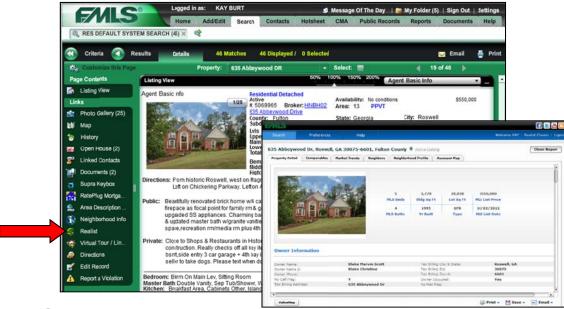




Has your buyer narrowed their property search to just a few homes? Print out all three sections of the **Neighborhood Info Report** and present it to them as a reference while they make their final decision. Print-outs from Neighborhood **Info** also make a great presentation piece for potential buyers to flip through as they tour your listing!

### **Realist Tax Link**

The Realist Tax link provides one-click access to tax data for the property.





Refer to the Tax User Guide for details on how to use the Realist Tax system.

Owner Information



Clicking on the Realist Tax link in the Links Panel will open the entire Realist program and present you with all information on the property. Clicking on the Tax ID link in the Agent Report will open the Property Detail Report for the property (this does NOT load the entire Realist program). If more information is needed, a Launch Realist button is provided to open the entire program. Print Lunch Realist

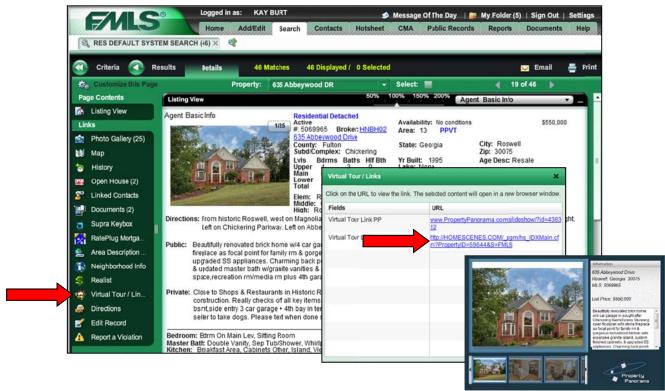


70



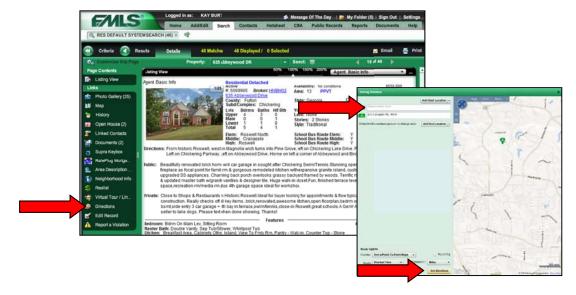
## **Virtual Tour / Links**

This link provides one-click access to Virtual Tour(s) attached to the listing. If more than one is available, click on the link for the virtual tour you'd like to view. If only one is available, clicking on the Virtual Tour link starts the tour.



#### **Directions Link**

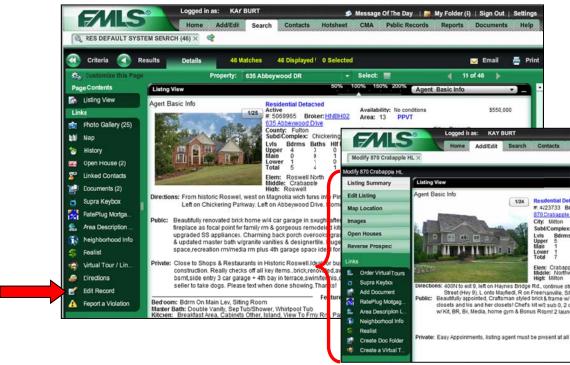
This link opens a **Driving Directions** window. Enter an address in the first box and click on the Get Directions button.





#### **Edit Record Link**

This link opens the new Fusion listing editor. Tools for editing listing data, map location, uploading/editing photos, scheduling open houses and caravans, and Reverse Prospecting are available. Only the original listing agent can edit the listing.



# **Report a Violation Link**

While FMLS does what it can to maintain accuracy in its database, it is not possible to monitor each transaction from list to close. For this reason, the Report a Violation link was incorporated in the links panel for every listing. Clicking the link will open an email already addressed to the FMLS Compliance Department containing all relevant property information. Just add a note as to what is wrong with the listing and click Send. FMLS will take it from there and will protect your identity from the other party.





### **Miscellaneous Links**

A few other links are scattered around the Agent Full Report:

**Address** – Clicking here will open a map in a new window with the property pinned on the Road view of the map.

**Broker Code** – Clicking here provides information for the listing company.

**PPVT** – Clicking here will display the Slide Show that is automatically created for every FMLS listing by Property Panorama if the listing agent has allowed it.

**VT** – Clicking here will start the Virtual Tour attached to the listing.

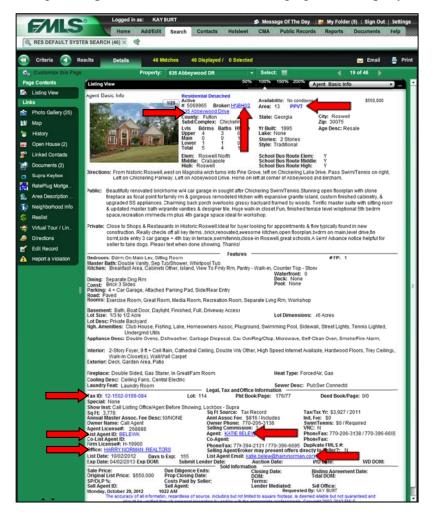
**Tax ID** – Provides another easy way to view tax information for the listing.

**Listing Agent Name** – Displays listing agent information as well as Office information for the agent.

**Co-Listing Agent Name** – Displays agent information for the co-listing agent, if applicable.

**Listing Agent Email** – Clicking here opens an email window for the listing agent.

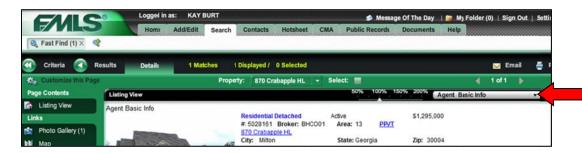
**Office** – Clicking here opens a window with the listing agent's company information.





# **Report Formats**

Fusion provides more than 20 formats for viewing property details. You will find the choices in the pick list at the top right of the detail page.



Some report formats are for agents viewing only, others are for buyers; still others for special tasks such as flyers.

- Agent Basic Info
- Agent w/out Sold (1 pg)
- Agent w/Sold (2pg)
- Agent Short
- Buyer Full
- Buyer Full w/Documents
- Buyer Full w/Map
- Buyer Full w/Rate Plug
- Buyer Short
- Flyer Report
- Flyer Report-No Price
- No Photo Full
- No Photo Short
- RES Photo Gallery
- Thumbnail Photo Report
- Mobile Friendly View
- Photo Gallery Flyer
- Public Map View
- Thumbnail View
- XPROP Agent Full
- XPROP Agent No Photo Short
- XPROP Buyer Full
- XPROP Buyer Short
- XPROP Mailing Label
- XPROP Photo Gallery
- XPROP Thumbnail Photo Report





# **Customizing the Details Page**

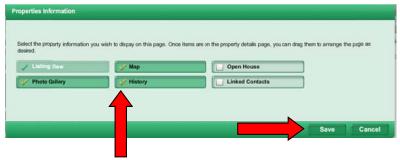
The Details Page may be customized to add panels for photos, a map, history, and/or open house information.

#### To customize the Details page:

1. Click on **Customize this Page** at the top left of the Details page.



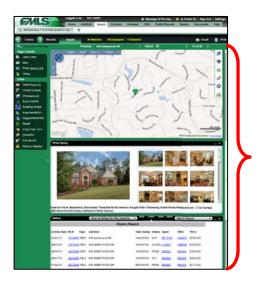
The Properties Information window appears.



- 2. Place a check in the box for each panel you want to add to the detail page.
- 3. Click on the **Save** button.
- 4. Panels for each selected item will appear below the Listing information on the Details page.



Panels that you add to the details page will remove the associated link from the links panel.



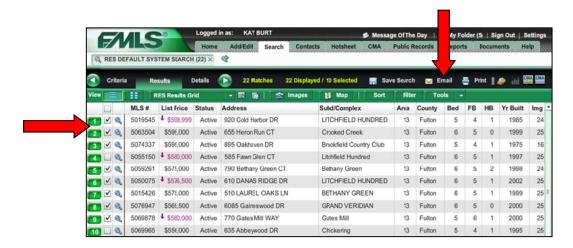


# **Preparing to Show Properties**

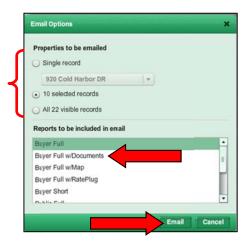
After you have narrowed your search results down to the best of the best you may want to email property information to your client, or print out reports that will be valuable to your client, and/or take your client to see those properties in person. Fusion helps you perform these routine tasks quickly and easily!

## **Emailing Listings**

- 1. Perform either an FMLS# Search, a Fusion Full Search, or a Saved Search and click to select the listings to email from the results screen.
- 2. Click the **Email** icon to open the email page. The icon is located at the right side of the black Searches Task Bar.

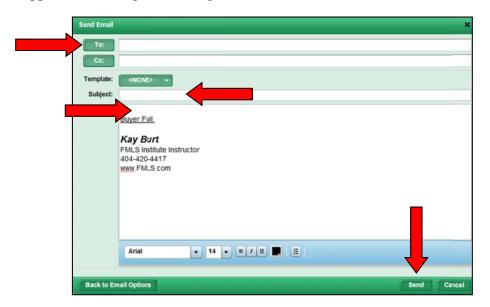


- 3. Select the listing(s) to email.
  - Single Property email a single listing.
     Use the pick list under the radio button to make your choice.
  - Selected Properties email only the records you selected from the results list.
  - All Properties email all listings on the results list (selected and unselected).
- 4. Select the report(s) to email from the Reports To Be Included in Email list.
- 5. Click on the **Email** button to continue.





- 6. Enter your client's email address in the **To:** box. If that client is entered as a contact, the email address can be selected by clicking on the icon to the left of the address lines. To email more than one person, simply separate the email addresses with a comma.
- 7. Add appropriate text to the **Subject:** box. You may also add a message in the **Message:** box. Use the blue toolbar to format the text in your message.
- 8. Click on the **Send** button to send the listing(s) to your client. A confirmation appears indicating the message has been sent.

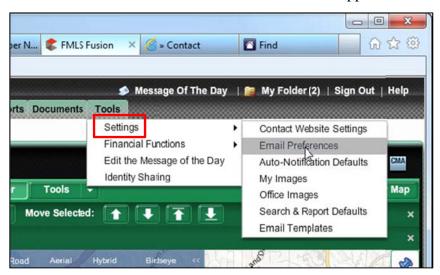


The recipient will receive an email with an active link to the listing(s). The number of links sent depends on the number of report formats you selected (Buyer Full, etc.). When your client clicks the link, they are taken to the live Fusion site and shown only the listing(s) sent. The link is available to your client for 30 days from the date sent so that your client will receive up-to-date information on the listing(s).



# **Adding an Email Signature**

1. Hover over **Tools** on the main toolbar. A menu appears. Select **Settings**.



2. Click on **Email Preferences**. The Email Preferences window appears.



- 3. Type your email signature in the box provided.
- 4. Click on the **Save** button. Your signature will automatically appear in all future emails.

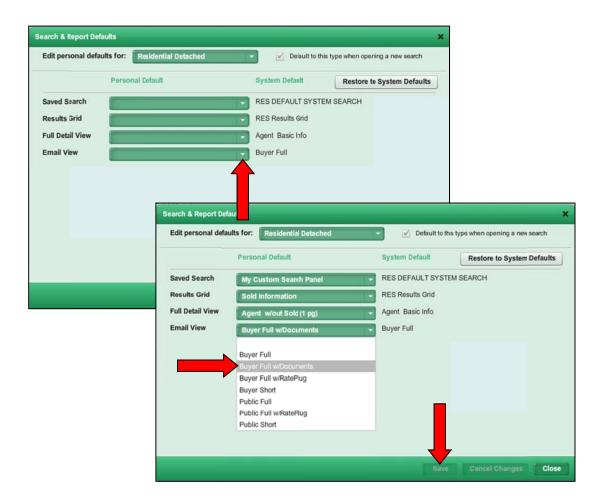


Image files such as a logo <u>cannot</u> be added to the signature. Do not add personal photos or live links. Doing so may cause the email to be rejected or placed in a spam folder by your client's email account.



#### To set email defaults:

- 1. Hover over **Tools** on the main toolbar. A menu appears. Select **Settings**.
- 2. Click on **Search & Report Defaults**. The Search & Report Defaults window opens.
- 3. Click on the pick list arrow for **Email View**.



- 4. Click on the Buyer format you wish to make the default for viewing properties.
- 5. Click **Save** when done.



# **Printing Property Information**

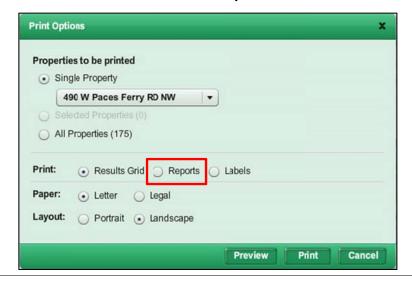
Fusion offers very flexible print options. From a single screen you can choose to print multiple report formats for a single property, for selected properties, or all properties in your search results. You can also print your Results Grid.

## To print listing reports:

1. Click the **Print** button (on either the Property Details screen or on the Search Results screen) to open the Print Options screen.

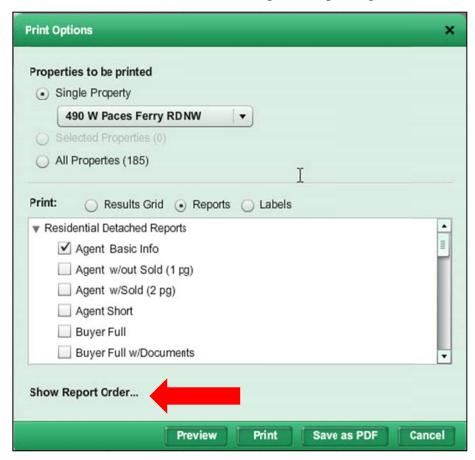


- 2. Select the listing(s) to print:
  - Single Property print a single listing. Use the pick list under the radio button to make your choice.
  - Selected Properties print only the checked listings from the results list.
  - All Properties print all listings on the results list.
- 3. Click on the radio button for **Reports**.





- 4. Select the report format(s) to print from the Reports To Be Printed list:
  - Available reports are divided into three groups: RES Reports, XProp Reports (reports common to all property types), and Archive Reports.
  - To expand or collapse the report groups, click the triangle next to the group name.
- 5. Click **Show Report Order** to expand the print options.



Fusion has four report format categories:

Residential Detached	Agent Basic Info, Agent w/o Sold, Agent w/Sold, Agent Short, Buyer Full, Buyer Full w/Documents, Buyer Full w/Map, Buyer Full w/RatePlug, Buyer Short, Flyer Report, No Photo Full, No Photo Short, Public Full, Public Full w/RatePlug, Public Short.
CrossProperty	Public Map View, XProp Agent Full, XProp Buyer Full.
Archive	History Report, Archive Detailed Report.
Мар	Default Map View.



- 6. Reorder the reports to print in a different order, if desired. Click and hold the left mouse button then drag the report you want to move to its new position.
- 7. If you want to collate the reports by report type rather than listing, select Collate Reports with a to print each report format on consecutive pages.

Not selecting this option would result in this print order:

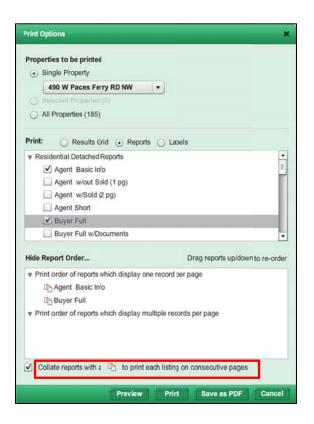
Listing 1: Agent Full Report Listing 2: Agent Full Report Listing 3: Agent Full Report Listing 1: Buyer Full Report Listing 2: Buyer Full Report Listing 3: Buyer Full Report Listing 1: History Report Listing 2: History Report

For example, if you selected 3 listings to print, and 2 report formats (Agent Full and Buyer Full), selecting this option would result in the following print order:

Listing 1: Agent Full Report Listing 1: Buyer Full Report Listing 2: Agent Full Report Listing 2: Buyer Full Report Listing 3: Agent Full Report

Listing 3: Buyer Full Report

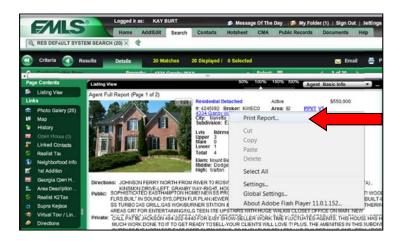
8. Click on the **Print** button to continue to your printer's menu. Buttons are also available in the print menu to **Preview** the reports, to **Cancel** the print job, or to **Save** the reports as a pdf file on your computer.





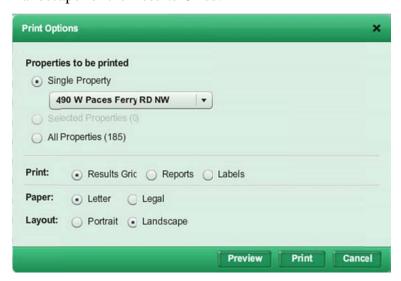


You may also print the Report screen by right-clicking on the Report and choosing **Print Report** from the pop up box.



#### To print the Results Grid:

- 1. Click the **Print** button (on either the Property Details screen or on the Search Results screen) to open the Print Options screen.
- 2. Click on the button for **Results Grid**. Then choose paper size and layout, usually Landscape for the Results Grids.



3. Click on the **Print** button, and then click on the **Print** button on the print menu.



You may also print the Results screen by right-clicking on the grid and choosing Print from the pop up box as shown in the screen above. If you choose Landscape orientation for any report, you will be prompted to set your printer's page orientation to Landscape to match the report being printed.



# **Printing Labels**

The Mailing Labels feature of Fusion is a perfect tool for your marketing efforts. The Search Grid is integrated with an Avery mailing label template, so you can go from the grid directly to printing labels for a mass mailing. It's never been easier!

## To create mailing labels:

- 1. Check or uncheck boxes to select the properties for which you wish to print labels.
- 2. Click on the Print button.
- 3. In the Print Labels window, select the type of label you want from the drop-down list.
- 4. In the Labels Styles field, select the Avery Label format you prefer.
- 5. Click on the **Print** button, and then click on the **Print** button on the print menu.

You can also Preview your labels or save as a PDF.



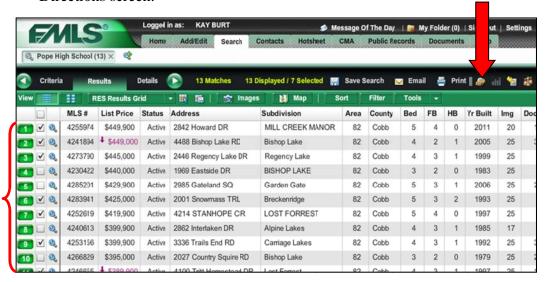


# **Driving Directions**

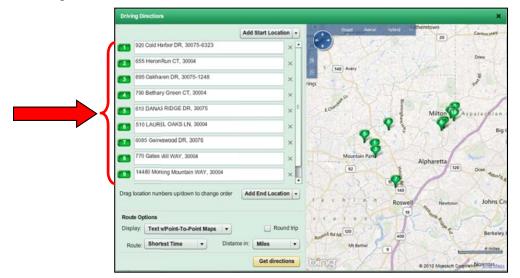
The Fusion directions feature enables you to get driving directions for up to 25 map locations. Two of the 25 locations can be a starting location and an ending location – or there is a box you can check to get round trip directions!

To get driving directions:

- 1. Indicate the properties to be mapped by checking the box for those listings.
- 2. Click the **Directions** icon on the Search Results screen to open the Driving Directions screen.

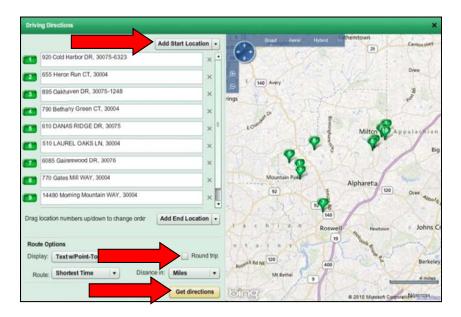


3. A list will be created using the sort order of the properties on your Search Results screen (remember that the default for sorting the Results list by Status, then by price - highest to lowest).





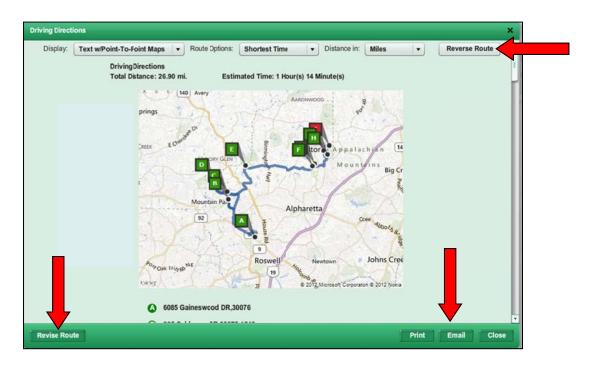
- 4. If you'd like to enter a starting and/or ending address, click on **Add Start Location** or **Add End Location** button
  - Clicking on the arrow in Add Start/End Location will provide two choices: a New Location address or My Office.
  - If you choose **New Location**, a new box will appear in your list with "Enter Address Here". Type the address of the location you wish to add.
  - If you choose **My Office**, your office address (as it appears in your FMLS Roster Entry) will appear in the list.
- 5. Drag and drop addresses to optimize your route. The pins on the map are helpful in this step! As you drag and drop addresses in the list, the pin numbers on the map will change to match the list!
- 6. Place a check in the **Round Trip** box if you want directions to return to your starting point.
- 7. Click on **Get Directions** to continue.



- 8. Use the pick lists at the top of the window to customize the format of your directions (i.e. display preferences, route preferences or route measurements).
- 9. Use the buttons on the Directions screen to **Revise**, **Print or Email** the directions.



## 10. Click on the **Close** button when finished.

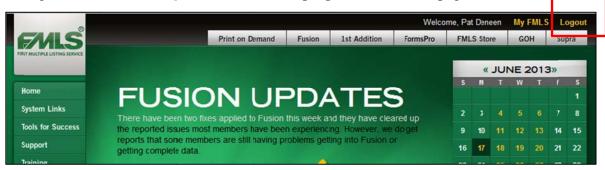




# **Logging Out of Fusion**

It is important for you to log out of Fusion when you are finished working. This is especially true if you are working on Fusion in an office environment. If you neglect to log out of your office workroom computer, the agent who uses the computer after you will be using your Fusion ID. This means they would have access to all your information.

To log out, click on the **Sign Out** link at the top right of the Fusion page.





# **Review of Objectives**

You should now know how to:

- Access and navigate www.FMLS.com and Fusion
- Use Home Page Gadgets to quickly access information in Fusion including listing database additions and changes, personal inventory, contacts and more.
- Use Fusion to locate and research properties for your customers and use field operators to obtain optimum results.
- Use the Fusion interactive map to draw geographic criteria for searches, understand best uses for various map views, and utilize the map overlays and points of interest tools.
- Recognize the value of saving searches; create and save unique searches for clients; create a customized search panel; edit, run and delete saved searches.
- Use Fusion's varied Results views to manage search results and to highlight buyers' primary wants/needs; sort and filter property matches for faster analysis; create customized Results grids; edit, recall and delete a custom grid.
- Utilize the information in an Agent Detail Report to research and analyze a property.
- Email and print property information and prepare driving directions to show properties.

# **Wrap Up Questions**

- Do you know how to log on to FMLS and Fusion?
- Which Fusion Gadget would you use to find information on a property using an address?
- Where is the icon located that provides a gallery view of search results?
- Do you know how to email and print a listing?
- How would you fill in the bedroom field in Fusion if your buyer wanted only 4 bedroom homes?
- Where would you go to change your FMLS password? What part of the system would you visit to update your roster information?

# FMLS Technical Support 404-255-4219

Any technical questions regarding the functions in Fusion, FormsPro, or Realist (Tax) should be addressed to the FMLS Help Desk staff.

#### **Business Hours**

Monday through Friday 9:00 am - 5:00 pm.

#### Weekend

Saturday 8:30 am - 5:00 pm Sunday 1:00 pm - 5:00 pm

Email: **support@fmls.com** (technical & how to questions)

Email: feedback@fmls.com (suggestions)

Live Chat: Available M-F 9am-5pm on the FMLS.com home page at the bottom of the left navigation bar.

#### FMLS Hotline FMLS Store Locations

(Confidential voice mail where possible rule violators can be reported)

#### 678-904-0446 - or - compliance@fmls.com

Please leave name, broker code and a phone number where you can be reached. Without this information, we can not follow through with the complaint.

#### **Training Class Registration**

#### Steps:

- 1. Visit the FMLS website at www.fmls.com
- 2. Enter your User Name and Password.
- 3. Hover over Training on left nav bar.
- 4. Click on Training Schedule.
- 5. Select location and class topic.

#### Email: training@fmls.com

# FMLS Administrative Support 404-255-8660

Questions regarding listing changes, fees, computer user forms and other administrative questions should be directed to Administrative Support.

#### **Business Hours**

Monday through Friday 9:00am - 5 pm.

**NOTE:** Use the "**FMLS Computer User Form**" to obtain a User Name & Password for a new agent, change a User Name to a different company, delete a User Name, change name or address information, change user access level, etc. This form can be located on the FMLS homepage under Administrative Support/Forms.

Fax Computer User forms to 678-904-0444 or

Email tonewuserforms@fmls.com

FMLS Main (Sandy Springs) 404-257-1447 FMLS NE (Duluth) Store 678-475-0544 FMLS NW (Marietta) Store 678-290-9493

Purchase FMLS maps, decals, clothing, software, closing gifts, display stands, measuring devices, calculators, accessories, jewelry, brochure boxes, signs, supplies, and much more. Visit one of our 3 locations or shop online at www.fmls.com and click on FMLS Store.

To check on internet orders and shipments: Email us at: **shipping@fmls.com** 

# Supra Key/Lockbox Issues 404-843-3672

Call Supra for any issues concerning lockboxes or lockbox keys. Supra stops issuing boxes at 4 PM.

# FMLS has 3 convenient locations to serve your real estate needs. Each of our 3 centers offers training, real estate supplies and Supra keys and lockboxes.

#### FMLS Main Office 5457 Roswell Rd Atlanta, GA 30342 404-255-8660 -or-1-800-505-FMLS 404-255-8602 (fax)

#### FMLS Northwest Center

166 Barrett Pkwy., Suite D Home Center Village Marietta, GA 30066 678-290-9493 678-290-9251 (fax)

### **FMLS Northeast Center**

2250 Satellite Blvd., Suite 215 Satellite Court Duluth, GA 30097 678-475-0544 678-475-0594 (fax)



#### Three Locations to Serve You:

FMLS Main Center 5457 Roswell Road Atlanta, GA 30342 404-255-8660 1-800-505-FMLS

FMLS NE Center 2250 Satellite Blvd., Ste. 215 Duluth, GA 30097 678-475-0544

FMLS NW Center 166 Barrett Parkway, Ste. D Marietta, GA 30066 678-290-9493





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