



Subscriptions & Portals Quick Start Guide— Flexmls

Stop emailing listings by hand. Let Flexmls work for you.

A search, a subscription, and a portal are three separate things. None of them automatically creates the others. Setting up one doesn't mean the others are running. Most agents only do one or two — the agents who do all three give clients a better experience and themselves a lighter workload.

The Three Tiers

Tier	What It Does	Who Does the Work	Best For
Saved Search	Stores parameters	You — manually	Quick reference
Subscription	Auto-emails matches	Flexmls	Every active client
Portal	Branded site + app	Your client	Every client, period

Why the Portal Wins

- **Live MLS data.** Flexmls is the source of truth. Zillow, Redfin, and Trulia pull downstream — accuracy and timing aren't guaranteed once data leaves the MLS. In the portal, your client sees exactly what you see.
- **You see what they actually click on.** Saved listings, hidden listings, viewed listings — all visible in Contact Management. The phrase “Buyers are liars” stops being a problem when the data tells you what they really want.
- **Mobile responsive + dedicated app.** Flexmls for Home Buyers is on the App Store and Google Play. Works on any device.
- **No search required to invite.** You can invite a client to the portal the moment you meet them. Their browsing generates data before you ever build a targeted search.

Honey Tip: Buy a cheap Google tablet (under \$100), bookmark your portal URL, and keep it in your car. When you meet out-of-town buyers in person, log them in on the spot — they leave knowing how to use it.

Frequency at a Glance

Frequency	Timing	Best For
ASAP	Fires 5–10 minutes after a match	Agent-only alerts, investors, narrow searches
Weekly (once daily)	Daily 5 AM batch of new activity	Most active buyers
Monthly	Once a month	Past clients, neighborhood feeds, relationship maintenance

Honey Tip: ASAP on a broad search = inbox overload = opt-out. The most common reason clients unsubscribe is email volume. Match frequency to search specificity.

Three Rules to Live By

1. **Opt-in is required.** Until your client clicks the confirmation email, they receive nothing — even if everything looks set up on your side. They either opt-in by clicking on the first subscription email, or they click on the email you sent manually with the listings you found first with their search.
2. **Subscriptions are forward-looking only.** Like a magazine subscription, you get future issues — not the one already on the shelf. Always email current matches manually after setting up the search (unless the portal is on).
3. **Re-saving a search creates a duplicate subscription if you click on Save and Add Subscription.** You should click on just Save the second time around. (See page 3 for the duplicate fix.)

Setting It Up — End to End

This workflow covers Search → Subscription → Portal in one pass. You can do all three from a single save.

Step-by-Step

1. Run a search. Quick Search, Address Search, MLS Number Search, or Multiple Address Search — all can power a subscription.
2. Review results. Click **Edit Search** if you need to refine.
3. Click **Save → Save Search**.
4. Name it after the client with a short descriptor: “Akbar — Carolina Shores 3BR.”
5. Under Contact, click **Existing** first to check if they’re already in the system. If not, click **New** and add them.
6. Toggle **Portal** on if you want the branded site + app (sends a portal invitation email automatically).
7. Click **Save and Add Subscription**. **Critical:** plain **Save** stores the search but creates no automated email.
8. Choose frequency: ASAP, Weekly (once daily), or Monthly.
9. Customize the message body — this is what the client sees every time. Keep it generic and professional.
10. Click **Save**.
11. If portal is **OFF**: manually email the current matching results now (subscription is forward-looking only). If portal is **ON**: skip the manual email — the portal already shows current matches.

 **Honey Tip:** Save your subscription message bodies as templates. Different scenarios call for different language — active buyer, monthly neighborhood feed, investor alert. Build them once, reuse forever.

The Hidden Power Setting — Additional Search Options

When you save a search, there’s a pop-up labeled “*Plus additional search options*” that most agents never open. It’s where you control exactly which events trigger an email.

Trigger Event	Fires an Email When...
New	A new listing matches the search
Price Change	A matching listing’s price changes
Open House	An open house is added to a matching listing
Back on Market	A listing returns to Active status
Extension	An Active listing’s expiration date is extended
Status Change	Any status change on a matching listing

 **Honey Tip:** Most agents leave all events checked. The real magic is unchecking everything except one or two. A “*stale listings price drop*” subscription with only **Price Change** checked is a totally different tool than a “*new inventory*” subscription with only **New** checked. See page 3 for recipes.

Common Setup Mistakes

- Saving a search but never clicking **Save and Add Subscription** — the search is stored, the email automation isn’t.
- Forgetting to manually email current results when the portal isn’t turned on — the client wonders why their inbox is empty and they didn’t get the original results.
- Setting ASAP on a broad search and burning out the client with 10–15 emails a day.
- Turning on Preview Mode and forgetting about it — the “Listings to Approve” queue builds up silently and the client receives nothing.

Keep It Working — Maintenance & Power Moves

A subscription/portal system left alone for six months will quietly break. These habits keep it healthy.

The Weekly Opt-In Status Report (Two Minutes, Thursday Morning for example)

Navigation: type **opt** in the search bar → **Opt-In Status Report**. Set a recurring weekly reminder.

Status	Meaning	What to Do
Pending	Got the opt-in email, hasn't clicked	Follow up directly — many never click without a nudge
Confirmed	Opted in, actively receiving	Note the days-until-inactive countdown
Opted Out	Clicked Unsubscribe	Call them before resending — usually email volume; offer monthly
Undeliverable	Bad email address on file	Fix the contact record
Inactive	No link clicks in 13 months	Resend opt-in once, or deprioritize

 **Honey Tip:** This is the #1 silent failure in Flexmls — agents believing clients are getting emails when they never opted in. Two minutes a week catches it before clients ghost.

The Duplicate Subscription Fix

Symptom: Your client says they're getting the same email twice (or three or four times).

Cause: Every time you edit a search and click **Save and Add Subscription** again, Flexmls creates an additional subscription — it doesn't replace the old one. No warning is shown.

Fix: Type **subscriptions** in the search bar. Sort by name — duplicates appear as "Search Name," "Search Name 1," "Search Name 2." Delete all but one.

Navigation Cheat Sheet

To Do This...	Type This in the Search Bar
Open the Opt-In Status Report	opt
Find duplicate subscriptions	subscriptions
Track sent emails (manual + subscription)	my sent emails
Customize portal defaults	portal preferences

 **Honey Tip:** Past clients use Flexmls portals for years after closing — agents report two-plus years of activity. Keep their portal and monthly subscription running. It's your lowest-cost retention tool.