



Flexmls for Appraisers

Quick Start Guide

This guide covers the three things that matter most for appraisers working inside Flex MLS: setting up the system to show you the data you actually use, exporting clean data into your appraisal software, and pulling the 1004MC report. It's not a full searching or CMA class — most appraisers already rank among the most experienced users on the platform. This is about making the system work faster for you.

In this guide: default searches · custom views · quick search templates · radius/comp searches · the 1004MC report · custom exports · stats & market trends · an AI pre-inspection workflow

1 Set a Default Search

A default search is different from a quick search template. A template saves which fields are visible — it doesn't save any data you entered into them. A default search saves both: not only can you keep the county field every time you search, but you can also have specific counties already filled in and selected.

Steps

1. Apply your search filters and enter your search criteria as usual.
2. Go to Save → Set as Default Search.
3. Click Confirm. You can check Don't Show Again if you don't want to see this prompt the next time you set a default search.
4. A message at the top of the screen confirms the search has been saved as your default.

Tip

If you set a default search and then switch templates from 1-Residential to 2-Land, your saved filters carry over — only the fields that don't exist on the new template get dropped. To start over, click Reset Filters to clear everything, then set new criteria and save it as your new default.

2 Build Your Appraisal View

Do this first, before you touch your Quick Search template. Once your view exists, saving a quick search template later will already have it selected — saving you a step.

Steps

1. On the List tab, click View.
2. Name it something you'll recognize later — e.g., "Residential Appraisal."

3. Go to Fields. Remove anything you don't need (e.g., Marketing Start Date, Listing Member, Listing Office, Marketing City) and add what you use — Lot Square Footage, Lot Acreage, Style, Basement, and Stipulation of Sale are good starting points.
4. Drag fields into the order you want using the four-directional cursor. Click a field label to rename it so it takes up less space (e.g., "Cumulative Days on Market" → "CDOM").
5. Click Save.

3 Create a Quick Search Template

A quick search template controls which fields appear on a search screen — not the data inside them. This procedure creates a new template that isn't based on an existing one.

Steps

1. In the Flexmls menu, click on Quick Search Templates under the Preferences section. Click on the New button in the upper right.
2. Enter a name for the template so you can easily identify it later.
3. Select the property types the template applies to.
4. Depending on your permission level, you may be able to make the template inheritable, so every login below your access level can use it — e.g., an office login setting up a template all agents in the office can use.
5. Select the default view to associate with the template — this determines which columns display on search results pages. Use the view you just created called Residential Appraisal, for example. Click Next to continue.
6. Add fields to the template: select them from the Available Fields list and click Add. Selected fields appear in the right column; select a field and click Move Up or Move Down to reorder.

Tip

Naming your template so it sorts to the top makes it faster to find it. Starting the name with "0" works well (e.g., "0 My Residential Search"), since templates sort alphanumerically. You can't overwrite a default template like 1-Residential, so there's no risk of breaking it.

4 Run a Radius or Comp Search

In the Quick Launch bar, do a radius around an MLS number or an address of the subject property:

- 1 mile from 100482699
- 2 miles from 207 sherrill street oak island nc

Finish the rest of the search parameters in the Quick Search.

A few shortcuts that speed up comp pulls:

- Multi-select statuses: hold Ctrl (Windows) or Command (Mac) and click each status you want.
- Date range: use the black arrow controls to step back by month — e.g., 6 or 12 months for comps.

- Wildcard search: in Public Remarks, wrap a term in asterisks — *fixer* will match "fixer," "fixer upper," etc., anywhere in the remarks.
- Exclude by stipulation: select a value (e.g., Short Sale), then toggle from "Of" to "Not Of" to exclude REOs or short sales from comps.

Tip

Mouse behavior matters here — when your cursor changes to a pointing finger, there's an action available; the four-directional icon means you can drag to reorder. You will also often see hover text when you hover over an item which tells you what the functionality is.

5 Draw a Map Shape

Steps

1. When you are on the map, look for the In the map toolbar in the bottom right and click the polygon tool — it's the last icon in the center tool group (rectangle and circle sit next to it if you want a straight-edged or round area instead).
2. Click on the map to set your first point, then keep clicking to trace the boundary — each click adds a point, connect-the-dots style.
3. Double-click to close the shape. Your search results narrow immediately to just the listings inside it.
4. Keep entering your other search criteria (property type, beds, baths, etc.) — they apply on top of the shape just like any other filter.

Tip

Zoom in before you start tracing. It's much easier to follow a subdivision or neighborhood boundary at a closer zoom level, and you can still click-drag the map mid-shape without losing the points you've already placed.

6 Pull the 1004MC Report

Steps

1. Uncheck Status in your search — you want every status inside your date range and radius, not just Active or Sold.
2. Click Use All Results to bring every matching listing into the report.
3. Go to CMA → Statistical CMA → Next.
4. Check the effective date box (must be today's date or earlier) and check Median Calculation.
5. Click View to generate the 1004MC breakdown for that data set.

Why uncheck status?

Unchecking status doesn't lose data — the effective date in step 4 pulls every listing one year back regardless of status. Unchecking up front just guarantees a listing's current status can't accidentally exclude it from the pull, so your comp set and median calculations aren't skewed by a gap you didn't intend.

7 Build a Custom Export for Your Appraisal Software

The default export can return 100+ fields — far more than any appraisal software needs. Build a custom export once with just the fields your software expects, in the order it expects them.

Steps

1. From your search results, click the three-dot menu → Export → My Exports. Open it in a new tab so you don't lose your results.
2. Click New and name it (e.g., "Appraisal Software Export").
3. Add the fields you need. A reasonable starting set: Total Baths, Bedrooms, City, Year Built, Total Garage Spaces, Stipulation of Sale, Subtype, Heated Square Footage, Sold Date, Sold Price, Sold Price per Square Foot, and List Date.
4. Reorder fields if your software expects a specific column order, then click Save.
5. Next time: from your results, three-dot menu → Export → Custom Text Export → select your saved export → Export. A CSV downloads and is ready to import.

Tip

Typing while a field list is open jumps you to matching fields — three or four letters is usually enough. Watch for detail groups that add several related fields at once; if it's more than you need, remove the extras and keep just the one field you wanted (e.g., Total Garage Spaces instead of the full garage/parking group).

8 Quick Stats & Market Trends

Stats on a search

Inside any search, click the Stats tab to see a statistical breakdown — days on market, sold-to-original-list-price ratio, and similar figures — for everything currently in that search or radius.

Market Summary

1. Go to Menu -> Statistics -> Market Summary
2. Click on Customize -> then New Location in the dropdown. Type in a city in the New Location box or you can type in a map shape that you saved previously. You can only use the Market Summary report for one location at a time.
3. Click on Search and review the results.

Market Trends Graphs for a more detailed report

To see trend graphs for any search rather than just one location, go back to the Menu -> Statistics -> Market Trends Graphs.

1. Click on Filters once it loads. You can click on Quick Search as an option to use multiple search parameters like location, bedrooms, bathrooms, etc. Or you can click on Saved Searches and use a search but remember that the search must have the status unchecked so it will work.
2. Run the report by clicking on Filter. It may take a minute or so to load. Click on Show/Hide Data table to see the raw data.

9 Bonus: AI-Powered Pre-Inspection Prep

A five-minute workflow to prep for an in-person walkthrough before you arrive, using only the listing photos and listing report.

Steps

1. On the listing, go to Print → Only Photos → Landscape, and set the page range to match the listing's photo count (e.g., 1–40) so it doesn't print blank pages.
2. Print to PDF and save it. I would also Print as PDF the listing report.
3. Upload the PDF to ChatGPT, Claude, or Gemini along with the prompt called Appraised and Confused in Beatrice's Guide to Practical AI (found at www.hivemls.training/ai).
4. Review the output before your walkthrough.

With that kind of prompt, the output typically comes back structured as: recommended PPE and tools to bring, stated assumptions and limits, findings grouped by category, risk flags (stop / proceed with caution), a priority walkthrough checklist, and a list of high-value data gaps you'll need to confirm on-site.

Caution

This runs on photos alone — it can flag things like rust, staining, or an undersized panel to check, but it can't see anything outside the frame (an electrical panel that's never photographed, for instance). Treat it as a prep checklist, not a substitute for the in-person inspection, and verify every finding yourself.

10 Where to Go for More

On the Hive MLS training website, under Flexmls:

- Best of Flex MLS: Searching — a 7-page handout covering every searching technique in depth (this class only covers a subset).
- Full CMA class / Full CMA Prep — covers CMAs in depth, including how to pull automated valuation models (AVMs) from outside sources.
- Guided Help in Flexmls to the right of the Quick Launch bar — Appraiser Guided Tours: from the guided help panel near the Quick Launch bar, look for the appraiser-specific tours (running the 1004MC, radius searches, custom templates, custom views). Each one is a step-by-step walkthrough overlaid directly on your screen — a fast, in-app refresher when you don't want to leave Flex.