Flexmls 101 Quick Start Guide

Dashboard + Listing Maintenance + Search + Subscriptions & Portals

Part 1: The Dashboard

The Flexmls dashboard is your homepage after login. Treat it like a command center: keep the gadgets you use every day, remove the clutter, and create separate dashboards for different jobs.

Get Back Home Fast

- Click the Hive MLS logo in the upper-left corner from anywhere to return to the dashboard.
- Use the Favorites bar for high-use pages. Click the star next to a menu item to add it.
- Switch between dashboard layouts from the dropdown under Home.

Customize the Page

- Click Customize > Add Gadgets to add dashboard tools.
- Most gadgets that show a three-dot menu can be adjusted. Choose Settings when it appears.
- Remove a gadget with three dots > Remove.
- Rearrange gadgets by dragging from the top of the gadget when the four-direction arrows appear.
- Use Customize > Change Layout to switch between one, two, or three columns. Two columns work well on a laptop; three columns are better on a large monitor.

Create More Than One Dashboard

- Click Customize > Add Dashboards in the upper-right corner. Start with a blank dashboard or choose a pre-built option such as Market Stats.
- Keep a clean daily dashboard for your most-used gadgets, then build a separate market dashboard for area comparisons.

> **Honey Tip:** Do not build one giant dashboard. Add a second dashboard when the next group of gadgets serves a different job.

Gadgets Worth Tuning

A gadget is useful only when its settings match your market and workflow. Start with these high-value dashboard gadgets.

Gadget	Best use	Tune it
Saved Searches	One-click access to saved searches; can display up to 100 searches.	Click New for new matches from the last 30 days. Click Edit to change criteria. Use three dots > Settings to choose how many searches display and whether they sort by name or last update. Use Refresh to update and Maximize for full-screen view.
Hot Sheet	Quick view of listing events.	By default it shows listing events across the MLS coverage area. Use three dots > Settings to narrow by city or county and property type. Add more than one Hot Sheet gadget for different markets.
Listing Collections	Fast access to curated listing groups.	Search for a collection inside the gadget. Use three dots > Settings to set count and sort by Last Update, Listing Count, or Name. Click column headers to sort or reverse the order.

Gadget	Best use	Tune it
My Listings	Your listings, regardless of status.	Click the gadget header to open the My Listings page. Use General Preferences - type *general* in Quick Launch - to choose visible statuses and how many days of off-market listings to include.

Honey Tip: The three-dot icon in the upper-right corner of a gadget is your customization checkpoint. If Settings appears in the dropdown, tune the gadget before deciding whether it belongs on your dashboard.

Market Stats Dashboard

The Market Stats dashboard is most useful when every stat is tied to an area you actually work. Customize it before relying on the numbers.

- Click Customize > Add Dashboards and choose the Market Stats dashboard.
- Included gadgets can show absorption rate, inventory, sold days on market, prices, sale-to-original-list-price ratio, and volume.
- On a market stats gadget, choose three dots > Settings. Click inside the Location box and select a city, zip code, subdivision, or custom map shape.
- A market stats gadget accepts only one location. To combine multiple zip codes or subdivisions, create or use a map shape and select that shape.
- Select the property type and click Save. Duplicate the same stat gadget for different areas so you can compare markets side by side.

Absorption rate	Quick read
0-5 months	Seller's market
5-6 months	Neutral market
6+ months	Buyer's market
Small subdivisions	Use caution. Low transaction volume can make statistics jump around.

Dashboard move	Where to click
Add a gadget	Customize > Add Gadgets
Duplicate a gadget	Customize > Add Gadgets, then click the gadget again even if Flexmls says it is already on the dashboard
Change columns	Customize > Change Layout
Tune a gadget	Three dots > Settings
Move a gadget	Hover at the top until the four-direction arrows appear, then hold left mouse button down and drag it to the area you want
Remove a gadget	Three dots > Remove
Set login page	General Preferences > First page viewed after login

Honey Tip: Use one Market Stats gadget per area. When an area is really several zip codes or subdivisions, use a custom map shape as the single location.

Part 2: Adding & Editing Listings

Adding a listing is easier when you do not try to finish everything in one pass. Build the shell, verify the map and required fields, save it as incomplete, add the media, then publish and check your work before it syndicates.

The Safe Order

Checkpoint	Fast path	Do not miss
Start it	Quick Launch: add > Add Listing	Auto Assistant handles property type, listing member, address, map, and tax data.
Pause safely	Save Incomplete > Add/Change > My Incomplete	Autosave runs about every 2 minutes. Incomplete listings can be edited, deleted, or published later.
Add media	My Incomplete or Change Listing > Media	Most photos, documents, floor plans, videos, and tours are added after saving incomplete or after the MLS number exists.
Publish	Click Add Listing at the top	No MLS number is created until required fields are complete and Add Listing succeeds.
Maintain it	Quick Launch: change > Change Listing	Use for price, status, media, open houses, Check It, Activity, ListTrac, and map fixes.

1. Start with the Auto Assistant

1. Type add in the Quick Launch bar, then open Add Listing.
2. Choose the property type and confirm the listing member. Assistants or brokerload users may need to search for the agent.
3. Type the address. If Flexmls cannot find it - common with vacant land or new construction - enter it manually.
4. Verify the map pin. Switch to Satellite view; if the pin is wrong, choose Move Pin Location and click Use This Location.
5. Review tax-record auto-population. Do not copy old photos unless you have permission to use them.

> **Honey Tip:** A wrong map pin can create showing, valuation, search, and syndication problems. Fix the pin before you move on.

2. Fill the Input Form Without Hunting

- **Red fields with an asterisk** are required. To clean up the screen, use Required Fields Only or Empty Required Fields Only.
- **Question mark or information icons** explain field rules and restrictions. Use them before guessing.
- **Conditional fields** hide until earlier choices are made. If you cannot find a field, check dropdowns above it - especially subtype and status.
- **Agent Remarks** are private to agents. Directions matter when GPS is weak.
- **Room rows** are driven by the total rooms value on the Main Fields tab. Complete dimensions help buyers plan furniture.

3. Save Incomplete, Then Add the Real Media

Click Save Incomplete Listing whenever you need to pause. Return through Add/Change > My Incomplete, select the listing, and click Edit. Incomplete listings can also appear on the Change Listing page.

1. Add the primary photo on the Photos tab. You will add the rest of the photos in the Photos section.
2. Click Save Incomplete Listing. Then reopen it from My Incomplete.
3. Use the media links for photos, floor plans, documents, videos, and virtual tours.

Media	Use it for	Common issues
Photos	Add Photos; upload from your computer; rearrange, rotate, replace, caption, and set the primary photo.	Max 15 MB or 3000 x 2000 pixels. File names cannot include special characters like [ ] ? * { } : /.
Floor Plans	Upload like photos.	Don't forget to include one.
Documents	Choose a document type, then upload the PDF or file.	Each document must be under 10 MB. Compress oversized PDFs on Adobe's website, not sketchy third-party sites.
Videos	Paste the video embed code from YouTube/Vimeo.	Flexmls does not host video files. A regular URL is not enough here.
Virtual Tours	Paste the tour URL from the photographer or tour provider.	This is the opposite of video: tours need URLs, not embed codes.

4. Choose the Right Status and Distribution Setting

- **Active** - the standard live status. Enter it within 3 calendar days of listing agreement signatures.
- **Coming Soon** - published but no-show until the Start Showing Date. A Start Showing Date is required and must be within 30 calendar days of the effective date. On that date, it automatically becomes Active and is syndicated, sent to IDX, and included in subscription emails.
- **Delayed Marketing** - not visible in the MLS and not syndicated until the marketing date. It is visible only to the listing agent and office admin; MLS/association staff must change the marketing date with documentation.
- **Broker Distribution** - controls syndication to internet sites and IDX. Defaults are usually checked; seller opt-outs are rare and should be intentional.

> **Honey Tip:** Save the listing as incomplete before the pressure starts. You can return, finish required fields, add media, and publish when the listing is clean - not when your browser session happens to be open.

5. Publish, Then Use the 10-Minute Safety Window

1. Switch to Empty Required Fields Only before publishing. If errors appear, Flexmls will show what is still missing.
2. Click Add Listing at the top of the page. When it succeeds, Flexmls assigns the MLS number.
3. Review the live listing immediately: price, status, dates, map, remarks, directions, photos, distribution, and showing instructions.
4. Subscription emails and syndication are delayed about 10 minutes after publishing. Use that window to catch mistakes before the listing fires out.

6. Change a Live Listing

Go to Add/Change > Change Listing, type the MLS number, or choose a listing from the My Listings panel. From search results, you can also use the dropdown arrow next to the MLS number and choose Edit Listing.

Change task	Where / why
Listing Information	Same core fields as initial entry: facts, remarks, directions, and details.
Change List Price / Statuses	Update price or move the listing through its lifecycle; required fields vary by status.
Media	Add or change photos, documents, floor plans, videos, and virtual tours after the listing is live.
Public Open House	Add open house details from the Change Listing page.
Locations and Geocodes	Fix a bad pin or geocoding issue.

Change task	Where / why
Listing/Selling Members	Add the buyer agent when pending/closing; search Non-Member if the agent is outside Hive MLS and not found.
Check It	Scan for potential issues such as fair housing language. Review anything flagged in red.
ListTrac	Use listing views and engagement data for seller conversations.

7. Mobile Edits

In the Flexmls Pro app or at m.flexmls.com, open My Listings, choose the listing, and tap Edit. Mobile handles common tasks such as price changes, status changes, photo uploads from your camera roll, document uploads, and access to incomplete listings. Not every field is editable on mobile. You also can't start adding a listing on a mobile device.

Navigation Cheat Sheet

To do this...	Fast path
Add a listing	Quick Launch: *add* OR Add/Change > Add Listing
Return to unfinished work	Add/Change > My Incomplete
Change a live listing	Quick Launch: *change* OR Add/Change > Change Listing
Print a blank input form	Quick Launch: input > Input Forms > choose property type > Print
Copy a listing	MLS number dropdown or Change Listing page > Copy Listing / Full Copy
Open Listing Activity Report	My Listings dropdown > Activity OR Change Listing > Activity

Honey Tip: ListTrac is your data backup. If the listing is getting views but no showings, that supports a pricing conversation. If views are low, look at marketing, photos, and exposure first.

Part 3: Search Basics Before You Save

Subscriptions and portals are built from searches, so make sure the search itself is clean before you save it. Use Quick Launch for speed, Quick Search for detail, and the results tabs to verify before sending anything to a client.

Quick Launch: The Fast Door In

- MLS number: type it directly. Click on Open in a new tab when you do not want to lose your current work.
- Address: type it directly if it has been listed before. Unlisted addresses can still work for radius searches if Google can locate them.
- Contact, member, saved search, CMA, listing collection, or menu item: type the first few letters instead of hunting through menus.
- Useful examples: *opt* opens the Opt-In Status Report; *saved* opens My Saved Searches; hot opens Hot Sheet.

Run or Refine the Search

Need	Use this
Simple lookup or common criteria	Quick Launch. Examples: MLS number, address, city, zip, price, beds, baths, square feet, subdivision, or simple radius.

Need	Use this
Guided search with more fields	Search > Quick Search. Add fields that Quick Launch does not cover, such as construction type, waterfront, or amenities.
One address or block range	Address Search in the menu. Use a number range plus street name to check a block or condo/townhome complex.
Several known addresses	Multiple Address Search in the menu. Enter one address per line and avoid street directions when possible.
Several MLS numbers	MLS # Search in the menu. Enter numbers separated by commas.

Map Checks and Shapes

- After a radius search, jump to the Map tab first and verify the pin landed where expected.
- Quick Launch radius searches start at 1 mile. For tighter areas, use the red push pin on the map and enter decimals such as 0.25.
- Use rectangle, circle, or polygon shapes to define areas. Each shape can be within, intersection, or not within.
- Save useful shapes to a Map Overlay so you can reuse them in Quick Searches, custom hot sheets, and statistics reports. A shape has a name like “Near the university” while the map overlay is the umbrella term, like “AirBNB areas” or “Gated Communities”.

> **Honey Tip:** The map is not just a picture. Verify pins, draw shapes, exclude problem pockets, and save reusable areas before you trust the results.

Review Results Before Saving

Tab	What it shows
List	Table view with customizable columns via the View menu.
Map	Pins, shapes, overlays, and driving directions.
Stats	Quick statistics on the current result set.
Detail	Full listing view for one property.
Photo	Gallery view.

- Click Edit Search when the results are too broad, too narrow, or in the wrong area.
- Use Save > Save Search only after the results make sense.
- Mark as Favorite when you want the saved search to be easy to find on the dashboard.

Saved Search vs. Template vs. View

Item	What it means
Saved Search	The actual criteria, such as city, price, beds, baths, map shape, or status.
Quick Search Template	Which search fields appear on the left panel when you search.
View	Which columns appear on the List tab of search results.

Save a Search and Reuse It

1. On the search results page, click Save > Save Search.
2. Choose New, or choose Existing when you are intentionally updating a saved search.
3. Name it descriptively. For client searches, use the client name plus a short criteria clue.

4. Check Mark as Favorite if you want it easy to find on the dashboard.
5. Click Save for a saved search only, or Save and Add Subscription when you want automated emails.

Hidden toggle	What it does
Two black arrows on Status	Toggle between absolute and relative date ranges.
Click on the days/months/years blue hyperlink in Off Market Dates section under Status	Toggle between days and months and years.
Click on blue hyperlink of/not/and	Toggle through the options, such as subtype not of Manufactured Home.
Ctrl/Cmd-click a list item	Add items one at a time; click again to deselect.
Shift-click two items	Select everything between them.

Quick Launch Search Examples

Type this	To get this
land, 200-300K, 28401 28541	Land listings between $200K and $300K across two zip codes.
sold within last 3 months, 1-1.5M, city of Oak Island	Closed listings in the last 3 months between $1M and $1.5M.
active, 300-350K, 3-4 bed, 2 bath, 1500-1800 sqft, sub of Fairfield Harbor	A nearly complete buyer search in one line.
2 miles from 207 sherrill street oak island nc	A radius search from an address; use no commas.
rental 2 miles from ...	A rental radius search; lead with the property type.

- Commas separate parameters. K means thousands and M means millions.
- Use *city of* before multi-word cities and sub of before subdivision names.
- For details Quick Launch does not cover, click Edit Search and add the field if it isn't already there.

Honey Tip: Do not assign a saved search to a contact unless you are ready for it to power a client workflow. Search first, verify results, then save.

Part 4: Subscriptions & Portals

A search, a subscription, and a portal are three separate things. None of them automatically creates the others. Setting up one does not mean the others are running. Most agents only do one or two; agents who use 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 search parameters.	You - manually.	Quick reference.
Subscription	Auto-emails matching listings.	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. Downstream sites may not match MLS accuracy or timing once data leaves the MLS.
- **You see what they actually click on.** Saved listings, hidden listings, and viewed listings are visible in Contact Management.
- **Mobile responsive + dedicated app.** Flexmls for Home Buyers is available for iOS and Android, and clients use the same login as the portal.
- **No search required to invite.** You can invite a client to the portal the moment you meet them. Their browsing can create useful data before you build a targeted search.

> **Honey Tip:** Use an inexpensive Android tablet, bookmark your portal URL, and keep it available for buyer meetings in your car. When buyers learn the portal in person, they are more likely to use it later.

Frequency at a Glance

Frequency	Timing	Best for
ASAP	Fires 5-10 minutes after a match.	Agent-only alerts, investors, and very narrow searches.
Daily / Once Daily	Daily 5 AM batch of new activity.	Most active buyers.
Monthly	Once a month.	Past clients, neighborhood feeds, and relationship maintenance.

> **Honey Tip:** ASAP on a broad search creates inbox overload and opt-outs. 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 from the first subscription email or from a manual email you send with listings from their search.
2. **Subscriptions are forward-looking only.** Like a magazine subscription, the client receives future matches - not the listings already on the shelf. Manually email current matches after setup unless the portal is on.
3. **Use plain Save when editing an existing search.** Re-saving a search and clicking Save and Add Subscription can create a duplicate subscription. Click only Save when you are just updating the existing saved search.

Setting It Up - End to End

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

1. Run a search. Quick Search, Address Search, MLS Number Search, or Multiple Address Search 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, such as "Client Name - Carolina Shores 3BR."
5. Under Contact, click Existing first to check if the client is already in the system. If not, click New and add them.
6. Toggle Portal on if you want the branded site + app. This 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, Daily / Once Daily, or Monthly.
9. Customize the message body. This is what the client sees every time, so keep it generic and professional.
10. Click Save. If portal is OFF, manually email the current matching results now because the subscription is forward-looking only. If portal is ON, skip the manual email because 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.

Portal Invite Without a Saved Search

A saved search is not required to invite someone to the portal. Use Contact Management, open or create the contact, and send the portal invitation from the contact/portal options. After the client starts browsing, use their saved, hidden, and viewed listings to tune future searches.

Opt-In and Subscription Troubleshooting

Problem	What to check
Client says they are not getting emails.	Open Quick Launch and type opt to access the Opt-In Status Report. Confirm the client opted in before assuming the subscription is broken.
Current matches did not send after setup.	That is expected when the portal is off. Subscriptions are forward-looking; manually email current matches once.
Too many emails.	Change frequency or narrow the search. ASAP should be used only for narrow searches or agent-only alerts.
Listings are waiting to be sent.	Preview Mode means listings wait for your approval before sending. Check the Listings to Approve queue regularly or turn Preview Mode off when approval is not needed.
Duplicate subscription.	Go to Search > My Saved Searches, click More/three dots > Subscriptions, review related subscriptions, and delete the duplicate. When editing later, use Save instead of Save and Add Subscription.

Use Portal Activity to Improve the Search

- If the client keeps hiding homes with the same feature, remove or limit that feature in the search.
- If the client saves homes in one area, tighten the map or add a second saved search for that area.
- If the client views but never saves, call and ask what is missing before the subscription keeps sending poor matches.
- If the client uses the portal heavily, use saved and hidden listings as conversation starters instead of guessing.

Common Setup Mistakes

- Saving a search but never clicking Save and Add Subscription - the search is stored, but email automation is not.
- Forgetting to manually email current results when the portal is not turned on - the client wonders why their inbox is empty.
- Setting ASAP on a broad search and overwhelming 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.
- Clicking Save and Add Subscription when you only meant to edit an existing saved search - this can create a duplicate subscription.

Honey Tip: The client experience is only smooth when all three pieces are intentional: clean search criteria, correct subscription settings, and a portal invite that clients know how to use.