

## ProMatch ILS Self-Training Guide

With high-speed Internet access you can download PM ILS at: [www.promatchils.com/knil.asp](http://www.promatchils.com/knil.asp)

### Exercise 1 Log-on

1. Double Click the ProMatch ILS icon on the desktop
2. Enter your assigned Sign on and Password in the appropriate boxes
3. Click the Login Button

### Exercise 2 Add A Listing

1. Click the Add a Listing item on the Main Menu screen
2. Click to choose the Property Type listing to be added, then Click the OK button
3. At the Tab input screens, you will be required to enter the information recorded on the Property Type input sheet already completed. The information flows into the system from the left to right off the input sheet.
4. Red items are required and all must be filled in to receive an MLS number from the server and be included in the database.
5. If you do not have all information at the time you begin a listing input to the MLS server, you can Save the partial information for completion at a later time. Five fields are mandatory to Save a partial listing, and user will be prompted to what those fields are.
6. Enter a Listing Date, Expiration Date, List Price, and pick yourself as the Listing Agent. Click the Save button and notice the message box. Add a Street Name and click Save, it then saves the partial information until you can complete the listing. Notice the MLS # on the bottom of the screen shows "Incomplete"

### Exercise 3 Edit Listings

1. Click the Edit a Listing item on the Main Menu
2. The Edit window will open. Notice your current agent listings are already listed.
3. Click the Unassigned tab. Notice the partially saved listing from Exercise 2 is listed
4. Click the unassigned listing, and click Get Data button on the right side button menu
5. Click the Edit button. Notice the listing screens that appear have several Red Required Fields that are incomplete. You must now complete these fields. Click and get your MLS number
6. Click the Close button
7. Click the Assigned tab. Click a listing in the Assigned List, then click the Get Data button, finally click the Edit button. When corrections are complete, click Save, then close.
8. Click Close to exit to the Main Menu.

### Exercise 4 Advanced Search - Allows for a detailed search using most input criteria. Can choose "status" that will be used most often and save as default.

1. Set up search criteria using "Hot Buttons", Property Types, Status and "Field List". Be sure to set the "operand". Click "Search" and number of Matches will show. If too many, add criteria to narrow the search.
2. "Browse" will give a one-line list of matches. Buttons on right side of screen will display chosen properties in various forms. If none are marked "Use", they will all appear on your chosen report style. **Note: "View Map"** will show all properties selected on a map with added info on these properties below the map.

3. You can "Save" your search criteria to use another day - will pull in all new matches. (Select "Advanced Search - Edit/Use")
4. To retrieve disclosures, use the "View/Print" report, "documents" appears on lower right side of report.

#### Exercise 5 Saving a Search, including Prospects

1. After developing your search, click the Save button, which is on the right of the Search window
2. Click the type of Save Search list you require - Listings - CMA - Prospect
3. Fill in the Person's Name and Phone Number and any additional information requested on the pop-up window. In the Prospect Save you will have the option auto-email, and must supply the Prospect's email address. (This will only work if you have an email address in your Agent Information of ProMatch)
4. Finally click the Save button to allow for future searching using this criteria.

#### Exercise 6 Reports

1. Hot Sheet - Select dates or past number of days, then property type, status, county (If not selected will include all) - can sort by MLS number or List Price. Can bring up detail sheet for any listing by "right clicking" on the blue MLS number.
2. Tour - Can add/edit your listing to a tour; also where you pull and print tour sheet. To print a Tour Sheet - Enter date of tour and then click View; when tour sheet appears, print it.

#### Exercise 7 Adding Listing Photos

1. On edit page click [photos]
  2. On Image Maintenance click [open photo]
  3. "Look In" - you need to go where ever you have photo stored
  4. Select it and click [open]
  5. Select [add to list]
  6. After adding all photos you choose (max of 6) click [save photos]
- Note:** Left photo will be main photo - appears on Listing Report. You can move them into any order you choose

#### Exercise 8 Help File

A comprehensive help file is available and printable for users of ProMatch ILS. We recommend new users of the MLS system open (F1) and minimize the Help file to be accessible as your work with the system.

#### Exercise 9 Correcting Agent Info -

1. Click on "Add, Edit, or Find an Agent"
2. Click on "Find"
3. Next box that comes up, type in last name & click on "Find"
4. Click on the Agent name and then "Open"
5. Click "Edit" – correct spelling of name and/or change "sign On" and/or "Password"
6. Click "Save"
7. To correct Address Info and/or Contact Info, just click on the tab, click on info you need to correct, click on "Edit", fill in correct info and click "Save". To add info click "Add", choose the type of info you are adding from the drop-down box, fill in info and click "Save".

**Remember: the "Contact #" is the one you want to be called on if not at the Office. This is the number that appears on your listing print-outs.**

## Exercise 10 Reports

Several reports are available in ProMatch: Hot Sheet, Roster Report, Tour Report, Flyers, Analysis Reports, and Global Reports. Select the type you want to create and fill in appropriate data (date, etc). ProMatch will then create the document for you to view and it can then be printed.

## Exercise 11 CMA Module

1. Click on Generate New CMA Report
2. Click the Property Type desired and click OK
3. Enter data from a subject property
4. Click the Save button and enter a CMA name then click Save
5. Click Next Step
6. Now search for comparable properties. Once found click on the Browse button
7. Select properties from the grid and click on the CMA Report button.

Note: You can use a saved CMA search to find updated results. You will not need to re-enter the subject property info but will need to enter the search criteria. Once this is set up and you press "Search", you can continue by pressing "CMA Report" from the Browse screen.

## Exercise 12 Hyper Search / Hyper Link

Hyper Line - Right side of screen, links for :

- "news"
- "weather",
- your* expiring listings
- hot sheet outline with highlighted numbers as changes to the hot sheet are made;  
click on any part of the hot sheet to bring those listings up on the hyper search screen
- online forms - Input forms, change form, and attached lists
- ProMatch contact info
- Links - PM Training Guide, Cheap Gas, and Realtor.com

### Hyper Search

Without disrupting what you are working on in the ProMatch Program, you can search for a listing by address or MLS number in Hypersearch (at the bottom of the home page). Enter the info, being sure to select property status, and matches will appear under the look-up box. Click on the match and the listing will appear on the right side. You can see photos, map, and documents when available by clicking on the appropriate button. You can also select a listing report, photo report, 4-up or view history without ever leaving the home page. And you have not interrupted what you were working on in the main section of ProMatch.

Note: you can expand the hyper search and hyper link areas by using the arrows on the top left corner of the home page screen. Use the arrows to reverse the expansion