

GETTING STARTED

A Beginner's Guide
to Kinnexus

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Press Date: Sept 16, 1999

System Information Page

This page is provided at the front of the manual to be an easy reference. These are important reference names and numbers that you will need when installing Kinnexus. You should receive this information during the first training session. If you don't know the answers to these questions, call your board office.

System Administrator (SA) _____

SA Phone Number _____

Server Name _____

Server Phone _____

Server IP Address _____

Tech Support Number _____

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INTRODUCTION

Kinnexus is a progressive MLS system that utilizes the latest in computer technology to provide a feature-rich program that is easy to use. Kinnexus uses common Internet tools as well as specifically designed customizing tools to give you all the power of the Internet combined with the power of a specific application. With a completely new screen layout, basic features are quick, intuitive, and convenient. But Kinnexus goes beyond just basic features. A full feature form editor, Internet compatible email, data replication, relevancy searching, and integrated mapping are all included in the standard Kinnexus package.

What you should know before reading this book

This book anticipates that you have had *some* previous experience with Windows. It does not describe what a mouse is, or how to use one. It does, however, include extra screen shots to help you know where to click. It also provides extra instructions that are normally associated with basic Windows operation. Keep in mind that this manual is not a Windows tutorial. If you are not comfortable with Windows you should take some basic steps to improve your Windows skills. The more comfortable you are with Windows, the more intuitive you will find Kinnexus.

A note from the author

Don't you just hate manuals – especially computer manuals? Me too. It always seems like the author never addresses what I want to do or has a tendency to talk over my head. Sometimes they do just the opposite and talk in such basic language that the details aren't discernible. I especially find it frustrating when the author tells me what everything does without telling me what I should do. This manual has been written with those concerns in mind.

This book is purposefully simple. If you are looking for detailed analysis of every Kinnexus function, there are other books available. This is a “getting started” book, a beginning place. It is written to help you get your feet wet in Kinnexus. This book will show you everything that you need to do for your day-to-day routine, but it is by no means a description of everything that can be done in Kinnexus. More information can be obtained in the Online Help, or in another manual.

How the book is organized

This book is organized into different sections, each representing a different group of functions. Here is a brief description of each section:

Getting Started

This section shows you how to install Kinnexus on your computer and walks you through connecting to the server for the first time. Most of the process is automated for your convenience.

Navigation

The first section in the manual will show you how to move around the program. Understanding how the program is laid out can greatly improve your productivity. Knowing where things are, and how to get there are two of the most important steps when learning any program.

Searches

The Search section will show you how to create a basic search using Kinnexus. With quick Search Wizards you'll be an expert detective in no time.

Columns

Search results are just one kind of data that is presented in columns. Screens with columns in Kinnexus are known as Listviews. This section will show you how to add, remove, and size columns, as well as how to print the items you want.

Listings

This section shows you how to add and update listings. Also in this section you are shown how to add and update photos. The data in Kinnexus is only as good as you make it. This section will help you keep your listings clean.

CMA

Kinnexus is equipped with the tools to create a simple CMA. An additional module is available to create a CMA presentation package. This section shows you how to use Kinnexus to create a simple CMA.

Internet

Kinnexus can take full advantage of the Internet. This section shows you how to use Kinnexus to browse the Internet. Another major part of the Internet is email. This section also shows you how to use Kinnexus to send and receive Internet email via Kinnexus.

Appendices

Several appendices are available to provide you with quick reference material.

Other manuals available

As has been mentioned, this is only a “getting started” manual. Two other manuals are available for those of you who would like to learn more about more advanced Kinnexus features.

Kinnexus for Advanced Users

This manual describes Kinnexus in more detail. In this manual you will learn:

- Advanced navigation techniques that can speed your movement through Kinnexus
- Advanced listview functions that allow you to add or average columns to get totals or sub totals
- How relevancy searching can help you find the best matches (Relevancy searching allows you to categorize your search criteria from most important to least important.)
- Create your own custom flyers
- Create your own custom Search Wizards
- Create mail merges using Microsoft Word
- Send a listing through email
- Create custom Internet links and action items

Kinnexus Office Manual

This manual helps office administrators who need access to the entire office. It details activities and functions that will help you keep Kinnexus running smoothly for your office. This manual shows you how to:

- Print your office inventory
- Move listings from agent to agent
- Add listings for other agents
- Determine office statistics
- Replicate data for an entire office

New features in Kinnexus 2.0

Kinnexus 2.0 has many features that were not available in the 1.x versions of Kinnexus. For those of you who have used the 1.x versions, here is a brief description of what you will find new in Kinnexus 2.0:

A New Look – Kinnexus 2.0 has a new look. Among other things, the Home Page buttons have been moved onto tabs. The Home Page also has a new To Do List.

Searches – A new search method ensures you will have your results quickly, no matter how many results were found. As an added bonus, you can cancel a search in progress.

Internet Email – Use Kinnexus to send Internet email anywhere in the world. You can also attach listings or search result lists to your email

Easier Setup and Installation – Kinnexus 2.0 is much easier to install and configure. Answer a few questions during the installation procedure and Kinnexus will take care of the rest. You will only be alerted if there is a conflict with another program.

Enhanced Printing – Kinnexus 2.0 supports various paper sizes from envelopes to poster size paper.

Easy Data Replication – Kinnexus 2.0 Replication Profiles take the mystery out of data replication. Enhanced connection routines minimize the chance of being disconnected. And, if you happen to be disconnected for whatever reason, simply reconnect and Kinnexus will continue from where it left off.

SECTION 1

GETTING STARTED

This section describes several processes that will help you get started in Kinnexus. The first two processes, Installation and Configuration, must be completed before you can begin your first Kinnexus session. Once you have installed and configured Kinnexus, working in the program is as easy as opening Kinnexus and logging on. Instructions on how to log on are also found in this section. Because searching is the feature you will be using most frequently in Kinnexus, an additional chapter showing you how to do a quick, simple search has also been included.

This section is organized in the following way:

- Chapter 1: Installation
- Chapter 2: Configuration
- Chapter 3: Logon
- Chapter 4: Simple Search

*To complete several of the processes contained in this section, you will need to consult your Board Form. The Board Form provides information such as your user name, password, server name, etc., that you will need to install, configure, and log on to Kinnexus.

INSTALLATION

This chapter will show you how to install the Kinnexus database and software on your computer.

*The instructions in this chapter are meant to help you start using Kinnexus quickly. For a more detailed description of the installation process and options, see Appendix A at the back of this manual.

System Requirements for Kinnexus

To install Kinnexus, you will need the following hardware and software:

- Kinnexus 2.0 CD
- Windows 95 or Windows 98
- 16 MB or more of RAM
- 50 MB free hard disk space
- 486 processor
- VGA monitor
- 14.4 Kbaud

Installing Kinnexus

The following instructions will show you how to install Kinnexus. A wizard will help you through the installation process. When instructed, consult your Board Form for information about certain fields.

1. Close any open programs on your computer.
2. Insert the Kinnexus CD into the CD-ROM drive of your computer. The Kinnexus Setup screen will appear.



Figure 1.1 - The Setup screen.

3. On the Setup screen, click **Kinnexus**.

Note: At this point some Windows software may need to be installed on your computer. If this is the case a series of dialog boxes will flash on the screen after you click **Kinnexus**. If any screens with an OK button appear, click the OK button and the installation will continue. When the Windows software installation is complete you will have to restart your computer and begin the installation process again. You will only have to install Windows software once.

4. The Installation Wizard appears. Click the **Next** button.

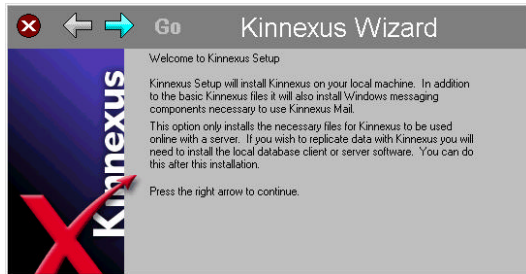


Figure 1.2 - The Installation Wizard.



Figure 1.3 - The Next button.

5. The Directory screen appears. Click the **Next** button.

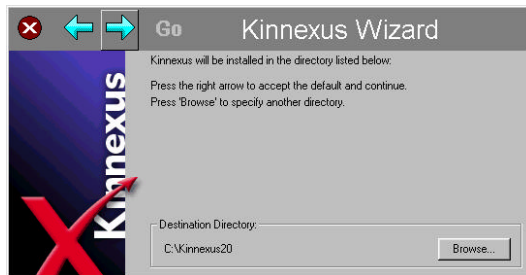


Figure 1.4 -The Directory screen.

6. The Features screen appears. On the Features screen, click in the check boxes that are selected on the Board Form next to *Kinnexus Features*.

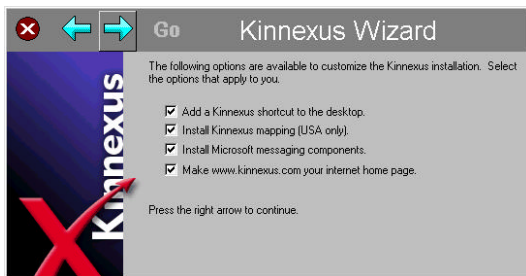


Figure 1.5 -The Features screen.

7. After selecting the appropriate features, click the **Next** button.

8. The Installation screen appears. To install Kinnexus, click the **Go** button at the top of the screen.



Figure 1.6 -The Installation screen.



Figure 1.7 - The Go button.

9. Kinnexus will install. A dialog box will appear asking you if you wish to restart Windows. Click the **Yes** button.

Windows will restart. When you reopen Kinnexus, you will be prompted to configure Kinnexus before you begin your session. See Chapter 2 for instructions on how to configure.

CONFIGURATION

Once you have installed Kinnexus on your computer, you will need to configure the program by setting up your user profile and specifying what kind of connection to the Kinnexus database you use. You will only have to configure Kinnexus once. After that, you can simply open Kinnexus, log on, and go to work.

*The instructions in this chapter are meant to help you start using Kinnexus quickly. For a more detailed description of the configuration process and options, see Appendix B at the back of this manual.

Configuring Kinnexus

The following instructions will take you through the basic steps of configuration. When instructed, consult your Board Form for information about certain fields.

Logon Screen

1. Open Kinnexus by double-clicking the **Kinnexus** icon on your desktop, or by clicking **Start>Program>Kinnexus 2.0**. The Logon screen will appear.

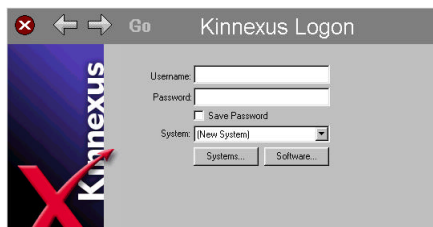


Figure 2.1 - The Logon Screen.

2. Find the name next to *Username* on the Board Form and type it into the **Username** field on the screen.



Figure 2.2 - The Username field.

3. Find the word next to *Password* on the Board Form and type it into the **Password** field on the screen.



Figure 2.3 - The Password field.

- Click in the **Save Password** check box. A check mark will display in the check box.

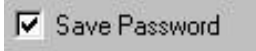


Figure 2.4 - The Save Password checkbox.

- Click the **Next** button at the top of the screen.



Figure 2.5 - The Next button.

The Welcome to Kinnexus screen will appear. Proceed to the Welcome to Kinnexus Screen section.

Welcome to Kinnexus Screen

Note: If someone has logged onto your computer before, it is possible that some of the fields on this screen already contain information. If the information on your Board Form corresponds to the information in the fields, simply click the Next button. Change any incorrect information to reflect the information on your Board Form.



Figure 2.6 - The Welcome to Kinnexus screen.

- Find the word(s) next to *Description* on the Board Form and type them into the **Description** field on the screen.



Figure 2.7 - The Description field.

- Find the name next to *Server Name* on the Board Form and type it in the **Server Name** field on the screen.



Figure 2.8 - The Server Name field.

- Find the name next to *Database Name* on the Board Form and type it into the **Database Name** field on the screen.



Figure 2.9 - The Database Name field.

- Find the numbers next to *Server IP address* on the Board Form and type them into the **Server IP address** field on the screen. If there is no number next to *Server IP Address* on the Board Form, leave the **Server IP address** field on the screen blank.

Figure 2.10 - The Server IP address field.

- Find the *Dial into server* checkbox on the Board Form. If *Dial into server* is checked on the Board Form, click in the **Dial into server** field on the screen. A check mark will appear in the box.

Figure 2.11 - The Dial into server checkbox.

- Find the numbers next to *Phone Number* on the Board Form and type them into the **Phone Number** field on the screen.

Figure 2.12 - The Phone Number field.

- Click the **Next** button.



Figure 2.13 - The Next button.

The **Download Profiles** screen will appear. Proceed to the **Download Profiles Screen** section.

Download Profiles Screen

Note: If someone has logged onto your computer before, it is possible that some of the fields on this screen already contain information. If the information on your Board Form corresponds to the information in the fields, simply click the Next button. Change any incorrect information to reflect the information on your Board Form.

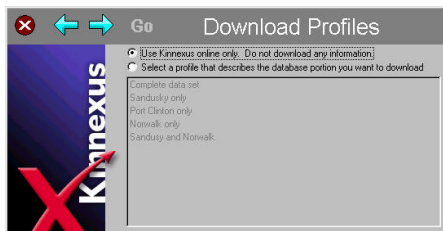


Figure 2.14 - The Download Profiles screen.

1. Make sure there is a small black dot in the circle next to **Use Kinnexus online only**. **Do not download any information.**



Figure 2.15 - The Use Kinnexus online only radio button.

2. Click the **Next** button at the top of the screen.



Figure 2.16 - The Next button.

The Online Database screen will appear. Proceed to the Online Database Screen section.

Online Database Screen

Note: If someone has logged onto your computer before, it is possible that some of the fields on this screen already contain information. If the information on your Board Form corresponds to the information in the fields, simply click the Next button. Change any incorrect information to reflect the information on your Board Form.

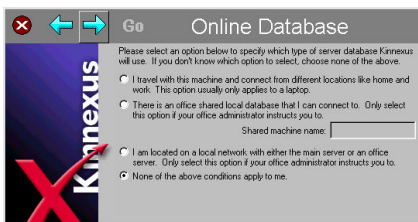


Figure 2.17 - The Online Database Screen.

1. Find the phrase next to *Server Database* on the Board Form, and click in the matching circle on the screen.

Please select an option below to specify which type of server database Kinnexus will use. If you don't know which option to select, choose none of the above.

I travel with this machine and connect from different locations like home and work. This option usually only applies to a laptop.

There is an office shared local database that I can connect to. Only select this option if your office administrator instructs you to.

Shared machine name:

I am located on a local network with either the main server or an office server. Only select this option if your office administrator instructs you to.

None of the above conditions apply to me.

Figure 2.18 - Server Database options.

2. Click the **Next** button at the top of the screen.



Figure 2.19 - The Next button.

The Progress screen will appear. Proceed to the Progress Screen section.

Progress Screen

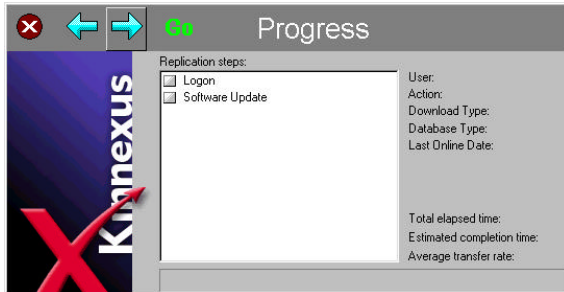


Figure 2.20 - The Progress screen.

1. Click the **Go** button to begin configuration. (The check boxes in the Progress window will check off as they are configured.)



Figure 2.21 - The Go button.

Congratulations, you have finished configuring Kinnexus and can now begin your first Kinnexus session! From now on when you want to use Kinnexus, all you have to do is open the program, log on, and go right to work. If you are ready to run your first search, see Chapter 4.

Note: If you have Kinnexus software that needs updating, a series of small screens will flash on the screen after you click the **Go** button. If any screens with an OK button appear, click the OK button and the update will continue. When the update is complete, Kinnexus will close and reopen at the Logon screen. See Chapter 3 to learn how to Logon

LOGON

Once Kinnexus has been installed and configured, all you have to do to access Kinnexus is open the program and log on. Logging on authorizes you to use Kinnexus and brings up your settings, such as portfolios, saved searches, and email.

*The instructions in this chapter are meant to help you start using Kinnexus quickly. For a more detailed description of the logon process and options, see Appendix C at the back of this manual.

Logging on to Kinnexus

The following instructions will show you how to log on to Kinnexus. You will be prompted to log on every time you begin a Kinnexus session. When instructed, consult your Board Form for information about certain fields.

1. Open Kinnexus by double-clicking the Kinnexus icon on your desktop, or by clicking **Start>Program>Kinnexus 2.0**. The Logon screen will appear.

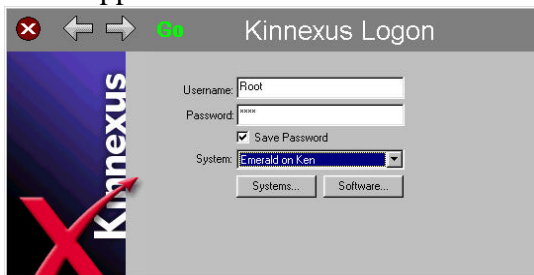


Figure 3.1 - The Logon screen.

2. If your username is not in the **Username** field, find the name next to *Username* on the Board Form, and type it into the **Username** field on the screen.



Figure 3.2 - The Username field.

3. If your password is not in the **Password** field, find the word next to *Password* on the Board Form and type it into the **Password** field on the screen.



Figure 3.3 - The Password field.

4. Click in the **Save password** check box. (It might already be selected. In that case, leave it selected.)

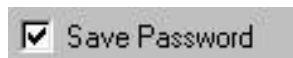


Figure 3.4 - The Save Password check box.

5. The name in the **System** field should be the name you entered during configuration. Leave this name as the default. If you use more than one system, see Appendix C.
6. When you are ready to begin your Kinnexus session, click the **Go** button.



Figure 3.5 - The Go button.

You can now begin your Kinnexus session! See Chapter 4 for instructions on how to run a simple search.

SIMPLE SEARCH

In this chapter you will learn the basics of creating a simple search. For information about more complicated searches, please see Section 3 of this manual, which contains six chapters related to searching, including a tutorial.

Because of the customizable nature of Kinnexus, it is impossible to include graphics that exactly correspond to the screens you see. Don't panic if something you see in the manual looks different or is in a different place than you see on the screen. This just means that your system administrator has customized it. The basic structure is probably the same.

Searching

1. Start this tutorial from the Home Page. If you are not at the Home Page, click the **Home** button in the top-right corner of the screen.



Figure 4.1 - The Home button.

2. Click the **Favorites** tab at the left of the screen.
3. Click the **Residential Quick Search** icon.



Figure 4.2 - The Residential Quick Search icon.

4. The Search Wizard appears. Using the Search Wizard is the quickest way to start a temporary residential search.

Figure 4.3 - The Search Wizard.

5. Click in the **Price** field on the first page of the Search Wizard. Notice that a blinking line is now in the box.



Figure 4.4 - The Price field.

Note: The following instructions and graphics assume that you have only one field next to search items dealing with ranges. It is possible that your system administrator has chosen to display fields dealing with ranges, such as **Price** and **Bedrooms**, as two fields side-by-side. If you come across a search item dealing with ranges that has two fields side-by-side, enter the minimum value in the left field, and the maximum value in the right field.

6. In the **Price** field, type: <200000-250000>. This is the price range for the search. You don't have to type the comma.

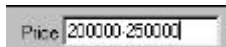


Figure 4.5 - The Price field containing a minimum and maximum value.

7. Find the **Status** list box. Click in the **Active** check box. A check mark appears in the check box.



Figure 4.6 - The Status list box and Active check box.

8. Click the **Go** button at the top of the wizard. This starts the search. You are taken to a list of search results.



Figure 4.7 - The Go button.

A list of search results matching the criteria your entered will display. See Section 3 of this manual for more in-depth information about searching.

SECTION 2

BASIC NAVIGATION

Now that you have installed Kinnexus and successfully connected to the server, you are ready to become familiar with the Kinnexus program. This section of the manual will introduce you to the basic organization of Kinnexus and the different features of the Kinnexus screen . You will also learn how to move between the different parts of the program.

This section is organized in the following way:

- Chapter 5: The User Interface
- Chapter 6: Navigating Kinnexus

USER INTERFACE

CHAPTER

5

This chapter will acquaint you with Kinnexus screen features, and begin to show you how they work. You will also get an idea of how versatile Kinnexus is by learning to turn parts of the screen on and off.

Parts of the screen

The following instructions assume you are looking at the Home Page. The Home Page is the screen you see after logging on to Kinnexus. (If you need help logging on, please refer to Chapter 3.) The Home Page is one of two basic screens you will encounter in Kinnexus. The second screen, called the Hot Sheet, will be discussed later in this chapter. Some parts of the screen are optional, meaning they can be turned on and off. Figure 5.1 below shows all of the items turned on so you can see what they look like.

Home Page

The Home Page is the screen you see right after logging in. The Home Page is a convenient place to start most functions in Kinnexus.

System Message

Your system administrator can send a message to the entire MLS. This message appears on the Home Page. This is a convenient place for your system administrator to inform you about upcoming events, or relay concerns and general help.

Main Window

The Main window is the large window in the middle of the screen. The information in this window changes depending on where you are in the program. When you first log on, it displays the message from the system administrator. In other areas of the program, it shows the search forms, search results, photos, or listing entry forms.

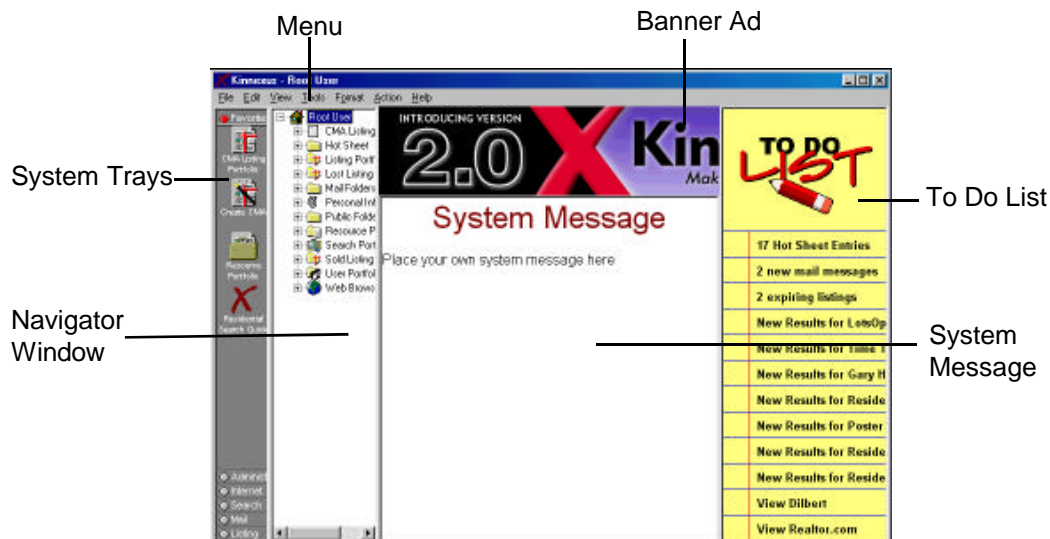


Figure .1 - The Home Page.

To Do List

The **To Do List** has a list of things that you will probably want to do each day. It informs you of listings that are about to expire, of new mail messages, and of any new results for your saved searches. It also can provide easy access to the Hot Sheet or web pages. For more information regarding the To Do List, see page 27.



Figure 5.2 - The To Do List.

Navigator window

The Navigator window is an advanced way to move around Kinnexus. It functions much like Windows Explorer. It is not recommended that you use the Navigator window unless you are very comfortable with using Windows Explorer. If the Navigator window is visible and you would like to turn it off, see page 24.

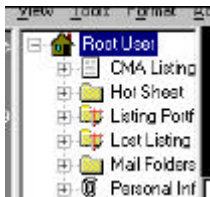


Figure 5.3 - The Navigator Window.

System Trays

The System Trays divide different parts of the program into different task bars. These task bars contain commands grouped by functions. Clicking one of the tray names opens the tray.

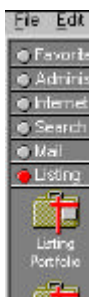


Figure 5.4 - The Task Bar or System Trays.

Menu Bar

A Menu bar is standard to most Windows programs. Clicking a menu on the Menu bar will display a menu of options you can select. File, Edit, and View are some of the menus on the Menu bar.



Figure 5.5 - The Menu Bar.

Banner Ad

Your system administrator can use this space to place ads from local companies, or links to websites. The banner ads appear one at a time at the top of the Home Page, and rotate however often the system administrator dictates.

Hot Sheet

The Hot Sheet screen has functionalities not available from the Home Page. To view these functionalities, click Hot Sheet Entries in the To Do List.

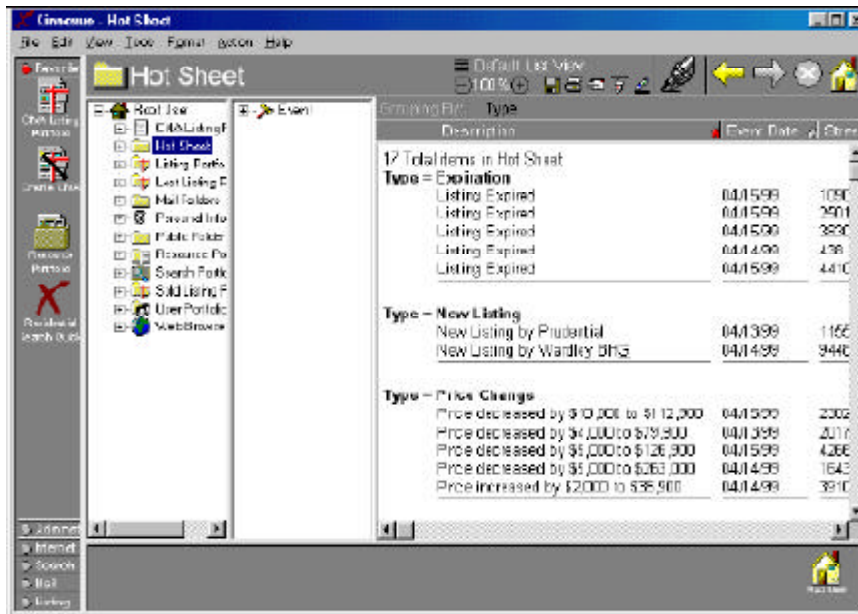


Figure 5.6 - The Hot Sheet Page.

Field Chooser

The Field Chooser is used to add fields from the database to listviews or forms. You can turn the Field Chooser on or off. If the Field Chooser is turned on, it is still only visible when you are looking at a listview or a form – the places where the Field Chooser is useful.



Figure 5.7 - The Field Chooser.

Next Step Bar

The Next Step Bar is another way to move around Kinnexus. Buttons on the left side of the bar let you know what you can do next. Buttons on the right side of the bar show where you can go next. As you move around the program, the buttons on the Next Step Bar change to reflect the different possibilities of your new location. The Next Step Bar is a powerful tool for both amateur and expert users alike. The Next Step Bar is not available from the Home Page. (See Figure 5.8)



Figure 5.8 -The Next Step Bar

Current Form Indicator

The Current Form Indicator is the name of the report or view currently in the Main window. This Current Form Indicator can be found at the top-center of the toolbar. (See Figure 5.9) Clicking the Current Form Indicator reveals a list of other views or forms that can also be used to show the data.



Figure 5.9 -The Current Form indicator.

Zoom

Zooming is a way to change the screen size of forms and listviews. Click the Zoom Out “ + ” button to make the text larger, or the Zoom In “ - ” button to make the text smaller. You can also click the percentage between the two Zoom buttons and select the desired zoom from the pop-up menu that appears.



Figure 5.10 -The Zoom indicator.

Save button

The Save button looks like a computer disk, and is a quick and convenient way to save the information that is currently in the Main window. Clicking this button is the same as clicking **File<Save**.



Figure 5.11 -The Save button.

Print button

The Print button looks like a printer and is a quick and convenient way to print whatever is in the Main window. Kinnexus automatically uses your default Windows printer, but allows you to designate another printer. If you can print from Windows, you should be able to print from Kinnexus.



Figure 5.12 - The Print button.

Send button

The Send button looks like an envelope. It is a convenient way to send whatever is in the Main window to another person using email.



Figure 5.13 - The Send button.

Connect button

The Connect button is a convenient way to connect to the server. Clicking the Connect button will link your computer to the Kinnexus server. You can configure Kinnexus to dial the server directly, or to dial your Internet provider. The Connect button is to the right of the Send button.



Figure 5.14 - The Connect button.

View Highlighters button

The View Highlighters button lets you group or mark listings. This button allows you to hide listings that have been flagged in a particular color. This button looks like a small marker and is to the right of the Connect button.



Figure 5.15 - The Highlighters button.

Highlighter Selection button

Clicking the Highlighter Selection button reveals a list of highlighter colors you can choose. Use highlighters to flag listings in which you think your buyers may be interested, lists that they have already seen, or perhaps those lists in which you know they are not interested. There are several colors to choose from -- use them however you wish.



Figure 5.16 - The Highlighter Selection button.

Back button

The Back button returns you to the last page you were viewing. It works exactly like a Back button on a Web browser. The Back button turns yellow when there is a page to return to, and turns gray when there is not a page to return to.



Figure 5.17 - The Back button.

Next button

The Next button takes you to the next screen. The Next button is yellow when there is a page to return to, and is gray when there is not a page to return to. The Next button works like a Next button in a web browser.



Figure 5.18 - The Next button.

Cancel button

The Cancel button stops the current action. This command is especially helpful when you want to terminate a search that may be returning lots of results, and you don't want to wait for the results to load.



Figure 5.19 The Cancel button.

Home button

The Home button always returns you to the Home Page. If you are ever lost, confused, or don't know what to do next, go to the Home Page. The Home Page is also a convenient place to start every Kinnexus function.



Figure 5.20 - Home button.

Turning things on and off

Many items on the Kinnexus screen can be turned on or off. This helps you customize the Kinnexus interface to your comfort level. New users, for example, may prefer an interface that hides many of the technical details, whereas an advanced user may want to see those details.

Your system administrator has pre-configured Kinnexus to appear how he/she feels it will be easiest for a new Kinnexus user. If you would like to change the way Kinnexus appears when you start Kinnexus, see *Your Configuration* on page 25.

The **View** menu on the Menu bar determines which toolbars and windows are visible. Click the **View** menu. The following list appears:

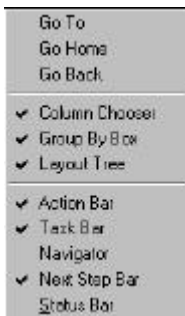


Figure 5.21 - The View menu is used to turn screen parts on and off.

A check mark next to an item means that the window or toolbar is visible, or will be visible when you are looking at the appropriate screen. Clicking an item in this menu turns the check mark on and off.

Try this...

1. If you are not looking at the Home Page, click the **Home** button at the top-right corner of the screen.



2. Click the **View** menu. The **View** pop-up menu appears.
3. Check to see if **Navigator** has a check mark next to it. (It probably doesn't.)

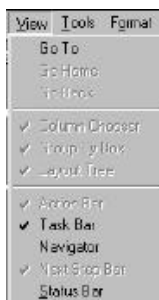


Figure 5.22 - The View menu without a check mark next to Navigator.

4. Click **Navigator**. The **Navigator** window will appear.

5. Click the **View** menu again. Notice that **Navigator** now has a check mark next to it. This means that the **Navigator** window is enabled.



Figure 5.23 - The View menu with a check mark next to Navigator.

6. Click **Navigator** again. The menu and the **Navigator** window disappear.

Your configuration

Each time you log in to Kinnexus, your screen settings will return to the default settings configured by your system administrator. A “configuration” contains information about which parts of the screen are on or off.

Examine your configuration

It is possible that the system administrator has created more than one configuration to use. The following steps will introduce you to the various available configurations:

1. Click **Tools > Configuration**. The **User Configuration Management** dialog box appears.

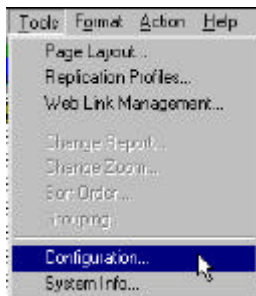


Figure 1.24 -Selecting Tools > Configuration.

2. The **User Configuration Management** dialog box shows a list of all the configurations that you have created, or that are available to you. In Figure 5.25, there is only one configuration available.

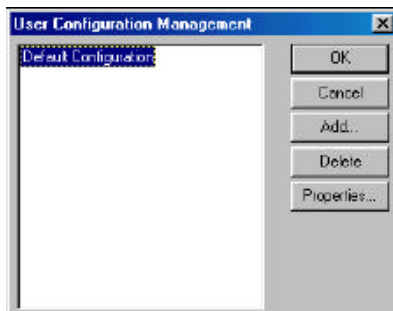


Figure 5.25 -User Configuration Management dialog box showing one available configuration .

From the **User Configuration Management** dialog box, you can click another configuration if one is available, or click the **Properties** button to view the details of your particular configuration.

The brief reference to configuration in this manual has been made so that you will know where to start, and where to get more information. The *Kinnexus for Advanced Users* manual covers configuration in greater detail.

What's Next?

In the next chapter you will learn how to move from place to place in Kinnexus.

NAVIGATING KINNEXUS

Now that you are familiar with the different parts of the screen, you are ready to move about the program. This chapter will show you two different ways to move through Kinnexus: the To Do List and System Trays.

The To Do List

When designing Kinnexus, we realized that most Realtors would simply like a button in the middle of the screen that said, “Predict everything I want to do today and just do it.” Then, to be really fancy, we would pre-click the button for you. While that is not quite possible right now, the To Do List is a pretty close approximation of what we think you will want to do every day.

The To Do List appears on the right side of the Home Page. It contains a list of common functions, like checking the Hot Sheet, checking new email, and checking updates on saved searches. When you click an item, Kinnexus takes you to the corresponding place in Kinnexus where you can manage that particular list item. Clicking the Hot Sheet Entries line, for example, takes you to a list of properties that have changed in the last few days. After you click an entry, a check mark appears next to the item. Clicking an item a second time removes the check mark.



Figure 6.1 - A check mark appears next to items you have already visited.

The following features are maintained in the To Do List:

- ✍ **Hot Sheet Entries** – Frequent listing updates. Clicking Hot Sheet Entries displays a listview of new and modified listings. Your system administrator controls how often the Hot Sheet Entries are updated.
- ✍ **Email messages** – The number of new email messages you have in your inbox.
- ✍ **Expiring listings** – Listings that are going to expire soon.
- ✍ **Saved searches** – All of your saved searches. This feature allows you to easily check the searches for new search results.
- ✍ **Internet links** – Items that remind you to check web pages. You can also specify how often the item should appear in your To Do List. Clicking on the Internet items in the To Do List opens the appropriate web page.

Navigate Using the To Do List

Here are some simple instructions showing you how easy it is to use the To Do List to navigate Kinnexus.

Check the Hot Sheet Entries

1. Locate **Hot Sheet Entries** on the To Do List. It will be preceded by a number representing the number of listings on the Hot Sheet. Click **Hot Sheet Entries**.



Figure 6.2 - Clicking *Hot Sheet Entries* moves you directly to the Hot Sheet.

2. The Hot Sheet is displayed. The Hot Sheet looks like this:

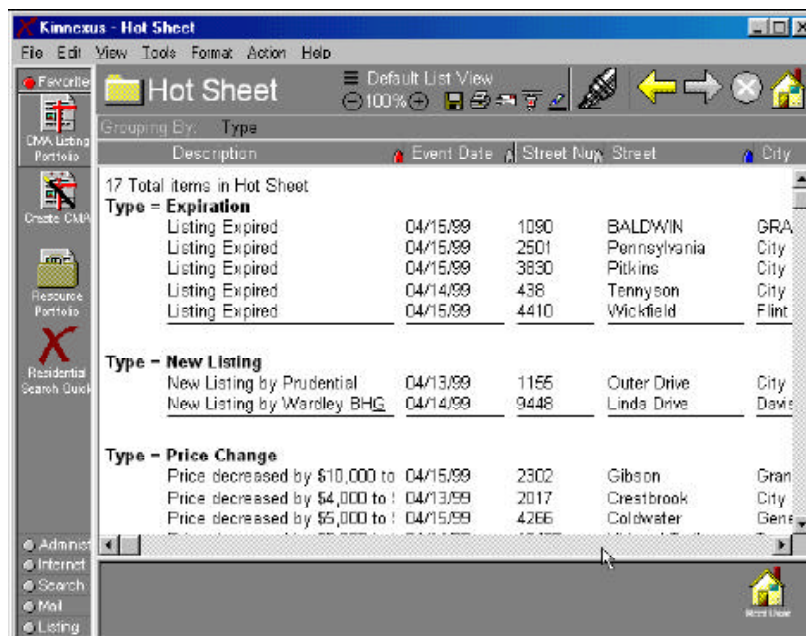


Figure 6.3 - The Hot Sheet.

3. Click the **Home** button in the top-right corner to return to the Home Page.



Figure 6.4 - The Home button.

4. Notice that **Hot Sheet Entries** now has a check mark by it, as shown in figure 6.5.



Figure 6.5 - A check mark displays next to Hot Sheet Entries once you have viewed the day's hot sheet.

Check a Saved Search

Kinnexus allows you to easily check your saved searches to see any search results that have changed.

1. Click the name of a saved search in the **To Do List**.

New Results for Gary Hale

Figure 6.6 - Using the To Do List to check an existing search.

2. You are taken to the search result list for that search. New search results are displayed in red.

Street #	Street	City	Built	Price	ED	Baths	Total	SQ
29 Total items in Gary Hale								
570	CHASSEUR	Grand Blanc	1996	\$249,900	4	2.50	2533	
703	MORNINGSIDE DR	Grand Blanc	1997	\$249,900	4	2.50	2186	
16495	DUSKLIGHT	Fenton	1998	\$249,900	3	3.00	2700	
199	PRIMROSE	Flushing	1997	\$238,900	3	2.50	2532	
7048	Woods West Dr.	Clayton	1992	\$234,900	4	2.50	2303	
306	MAIN ST	Flushing	1938	\$229,900	5	2.55	4297	
644	PLUM TREE LANE	Fenton	1995	\$229,500	3	3.50	2500	
8082	Bloss Court	Swartz Creek	1992	\$229,000	4	2.50	2034	
12011	Torrey Road	Fenton	1920	\$229,000	3	1.00	1150	
811	WHISPERWOOD L	Fenton	1989	\$228,000	2	2.00	1550	
619	Aplegate	Grand Blanc	1985	\$225,000	3	2.50	2684	
399	Coutant	Flushing	1936	\$220,000	6	2.55	3471	
708	Boutell	Grand Blanc	1977	\$219,900	4	2.50	2452	
12509	Handerson Rd	Forest	1996	\$219,900	3	2.50	1971	
1134	Drury Ln	Flushing	1988	\$219,900	3	2.50	2190	
11163	Mt. Meade	Flushing	1987	\$219,900	4	4.00	2610	

Figure 6.7 - New search results are displayed in red.

3. Click the **Home** button at the top-right corner of the screen to return to the **Home Page**.



Figure 6.8 - The Home button.

Summary

The To Do List is a convenient way to move through Kinnexus. One click takes you directly where you need to go. The To Do List tracks the Hot Sheet, saved searches, expiring listings, new email, and any web pages you want to monitor. If you are interested in adding and modifying items in your To Do List, consult the *Kinnexus for Advanced Users* manual.

System Trays

Another way to move around Kinnexus is to use System Trays. System Trays, unlike the To Do List, allow you to access any part of the program. System Trays separate all of the Kinnexus functions into individual groups based on their function. The Listing tray, for example, has all of the functions and tools that are relevant to maintaining your listing inventory. The Search tray has all of the functions for creating searches and viewing search results. System Trays are located on the left side of the Home Page. This is what they look like:

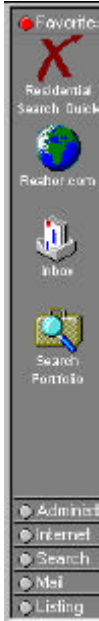


Figure 6.9 - The System Trays showing the Favorites tray.

Changing System Trays

Clicking the name of the different System Trays exposes another set of commands. Figure 6.9 shows a typical Favorites tray. Clicking the Search tray displays the Search icons.



Figure 6.10 - The System Trays showing the Search tray.

Scrolling System Trays

Sometimes there are too many commands in a System Tray to show all of them on the screen at the same time. When there are more commands in a tray than can be shown on the screen at once, Kinnexus puts yellow Scrolling Arrows at the top and bottom of the System Tray. Clicking directly on a Scrolling Arrow will scroll all of the icons in the tray, allowing you to see the hidden commands.

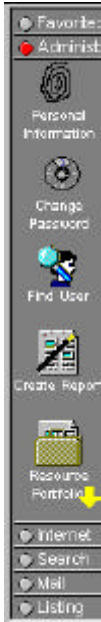


Figure 6.11 - The yellow Scrolling Arrow at the bottom of the task bar means there are extra commands in the tray. Click the Scrolling Arrow to scroll the commands.

Favorites Tray

The Favorites tray is the only customizable System Tray. You can put the commands you use most often in the Favorites tray to save time finding the command in the other System Trays. For convenience, your system administrator has predetermined the commands that he/she thinks you will use most frequently. Documentation for changing the commands in the Favorites tray is provided in the *Kinnexus for Advanced Users* manual.

SECTION 3

SEARCHING

Searching is probably the process that you will be using the most in the Kinexus program. This section explains all the basic points you need to know to search. Section 3 begins with an overview of searches and explains the basic parts of the screen that are used when performing a search. Next, you will be shown how to search by field type, such as numbers, words, or list items. Then you will be shown how to navigate search results. The last chapter in this section is a tutorial, where you will be guided step by step through different searching features.

This section contains the following chapters:

- Chapter 7: Basic Searches
- Chapter 8: Saved Searches
- Chapter 9: Search Results
- Chapter 10: Search Tutorial

BASIC SEARCHES

CHAPTER

7

Searching in Kinnexus is extremely flexible. On one hand, it has been designed so you can get in and get what you want quickly, yet it is powerful enough to allow you to search on most every field in the database. In this chapter you will learn the basics of creating a search.

Because of the customizable nature of Kinnexus, it is impossible to include screen shots that exactly correspond to the screens you see. Don't panic if something you see in the manual looks different or is in a different place than you see on the screen. That just means that your system administrator has customized it. The basic structure is probably the same.

Search overview

There are four different parts to a search:

- The Search Wizard
- The Criteria Form
- The Search Result List
- The Search Result Form

The Search Wizard

Your system administrator creates and maintains the Search Wizards. A Search Wizard is a very intuitive way to search the database because of the graphical layout. The Next and Previous buttons move you between the different pages. System administrators place the most commonly searched fields on the first pages of a SearchWizard.

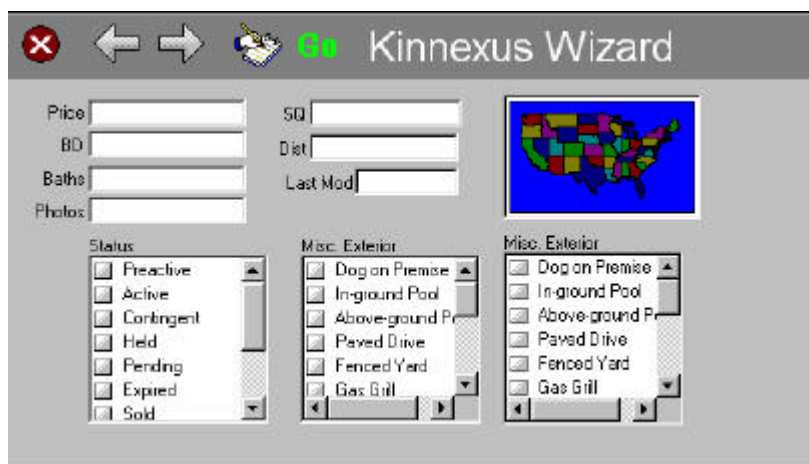


Figure 7.1 - The Search Wizard is used to define searches.

There are five buttons at the top of a Search Wizard.



Figure 7.2 - Buttons on the Search Wizard.






Search Wizard Buttons		
Cancel		This button cancels the search wizard without performing the search. You can also click the cancel button to stop a search you have started.
Previous		This button returns you to a previous page in the search wizard.
Next		This button takes you to the next page in the search wizard.
Go To Criteria		This button drops you out of the search wizard to the search criteria page without executing the search. Any information you have already entered in the search wizard will also be entered on the criteria form.
Go		The Go button starts the search process. You can click on this button from any page in the search wizard. You don't need to go all the way to the end of the wizard. In fact, you should be able to enter most of your searches from the first or second page of the search wizard.

Figure 7.3 - Description of the Search Wizard buttons.

The Search Criteria Form

The Search Criteria Form is another way to enter search criteria. The form is laid out on the monitor exactly as it would look if you sent it to a printer. Search criteria is entered into fields. Use the TAB key to move forward through the fields. SHIFT + TAB moves backwards through the fields. From the Search Criteria Form you can either run the search, or reopen the Search Wizard. The Go button on the Next Step Bar starts the search. For more information about entering a search from the Search Criteria Form, see page 44.

District:	<input type="text"/>
Status:	<input type="text"/>
Subdivision:	<input type="text"/>
Price:	<input type="text"/>
Style:	<input type="text"/>
Year Built:	<input type="text"/>
Bedrooms:	<input type="text"/>
Sq. Ft. Total:	<input type="text"/>

Figure 7.4 - A Search Criteria Form.

The Search Result List

After running a search you are shown a list of search results. The proper name for this list is a Listview. Listviews are a convenient way to view and organize search results. You can, for instance, sort the list based on any one of the columns. From this list you can return to the Search Criteria Form, the Search Wizard, or view more detailed information about any one of the search results. To print from this list, choose File<Print. For more information about Listviews, see page 51.

Status	Stre	Street	City	Price
29 Total items in Residential Temporary				
Active	202	PINEVIEW DR	FENTON CITY	\$140,900.
Active	275	ROLSTON	CITY OF LINDE	\$141,900.
Active	5326	Olde Shawboro	Gd Blanc Twp	\$142,900.
Active	265	ROLSTON	LINDEN	\$142,900.
Active	3089	OLD FARM ROAD	FLINT,TWFP	\$143,900.
Active	330	ANDREA AVE	CITY OF LINDE	\$144,200.
Active	2433	PAGELS	GR BLANC	\$144,600.
Active	3133	DAVISON RD.	Davison Twp.	\$144,900.
Active	2381	Shiawassee	Fenton	\$144,900.

Figure 7.5 - A Listview of search results.

The Search Result Form

Search Result Forms show more detailed search results. You can select what type of form you would like to use, depending on the situation. Perhaps you would like only a flyer – something with a large photo and an overview of the property. Or, perhaps you would like a more detailed page that has every field the listing agent has specified about the property. Search Result Forms can be created by anyone – including you. If none of the existing forms suit your needs, you can create your own. You can create a form that prints on a large poster-sized piece of paper, or create a form that prints addresses on an envelope. All of this and more is possible with Kinnexus Search Result Forms. For more information about Search Result Forms, see Chapter 9 of this manual.

District:	20	MLS #:	708021
Status:	Active		
Subdivision:	FOREST RIDGE		
Price:	\$144,200.		
Style:	1 Story		
Year Built:	1997		
Bedrooms:	3		
Sq. Ft. Total:	1315		
Baths Total:	1.50 Baths Full: 1		
Basement:	Yes		
Garage:	2		
Acreage:	0.00		
Water Front:	No		
Lake Name:			
Golf Course:			
Course Name:			
Ownership:	Single Family		
Date Listed:	08/18/97		
Last Modified:	03/10/98		
Last Book:	42		
Last Page:	419		



Photos Available: 1

Street #: 330 Dir: Name: ANDREA AVE
City/Township: CITY OF LINDEN
Elementary School:

Listing Office: C-21 Park Place Ltd.
Listing Agent: Yvonne Perry

Figure 7.6 - A sample Search Result Form.

Now that you know the basics of running a search, here are a few other searches you can try that will show you how to search the different types of data:

Search on price and bedrooms (Numbers)

Probably one of the most common searches you will use is one that restricts the price of and the number of bedrooms in a residential property. If you specialize in an area other than residential, such as land or commercial, you can substitute the Bedroom field with something more applicable -- such as square feet or acreage. This example will show you how to search number fields in Kinnexus:

Beforehand

- These instructions start from the Home Page. If you are not on the Home Page, click the **Home** button in the top-right corner of the screen.



Figure 7.7 - The Home button.

What to do

1. From the Home Page, click the **Search** tray in the task bar at the left side of the screen.



Figure 7.8 - The Search system tray.

2. Click the **Residential Quick Search** icon. The Search Wizard appears.



Figure 7.9 - The Residential Quick Search icon.

3. Find the **Price** field. Although the wizards look different for each board, there should be a **Price** field on the first page. Find the **Price** field and click in it.

Note:

The following instructions and graphics assume that you have only one field next to search items dealing with ranges. It is possible that your system administrator has chosen to display fields dealing with ranges, such as **Price** and **Bedrooms**, as two fields side-by-side. If you come across a search item dealing with ranges that has two fields side-by-side, enter the minimum value in the left field, and the maximum value in the right field.

Price


Figure 7.10 - The Price field on a Search Wizard.

4. In the **Price** field, type: <130000>. This is the minimum value. You don't need to enter a dollar sign or commas. Kinnexus will do it for you.

Price

Figure 7.11 - The Price field containing a minimum value.

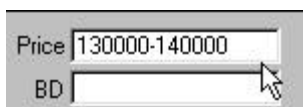
5. Type a dash: <-> next to the value you entered in step 4.



Price 130000-140000
BD

Figure 7.12 - A dash next to the minimum value indicating a range.

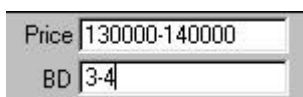
6. Type: <140000> after the dash. This number is the maximum price for the search.



Price 130000-140000
BD

Figure 7.13 - The Price field containing a maximum value.

7. Click in the **Bedroom** field on the wizard. Enter: <3-4>.



Price 130000-140000
BD 3-4

Figure 7.14 - The Bedroom field containing a minimum and maximum value.

8. Run the search by clicking the **Go** button at the top of the wizard. You are taken to a list of search results.



Figure 7.15 - The Go button starts a search

9. To go back and modify the search, click the **Criteria Wizard** button on the **Next Step Bar**.



Figure 7.16 - The Criteria Wizard button returns you to the Search Wizard.

Note:

The above example assumes that both **Price** and **Bedrooms** fields were on the first page of the wizard. However, these fields might not be on the Search Wizard at all. The location of fields on the Search Wizard is determined by the local system administrator.

To get this	Enter this	Additional Information
All properties with price between \$120,000 and \$140,000.		You don't need to enter the dollar sign and commas. Kinnexus adds them automatically.
All properties less than \$120,000		This search actually finds all properties less than or equal to \$120,000.
All properties more than \$120000		

Figure 7.17 - Methods of entering number ranges.

Search on street name (Text)

These instructions will show you how to find a property on a particular street. Street names are text fields. Text fields can be tricky because you are dependent on the listing agent to type them in correctly. It is best when searching text to use only a portion of the word you are looking for, and to place the wild card character * before and after the text.

For this example you are going to find all of the property on Martin Luther King. (If your city or town doesn't have a street called Martin Luther King, just substitute in a street name you are familiar with.) You don't know if the listing agent typed the name of the street ML King, Martin L King, ML King Ave. or ML King Avenue. That is why you use wild cards when searching text. Follow these steps:

What to do?

1. From the Home Page, click the **Search** tab in the task bar on the left side of the screen.



Figure 7.18 - The Search tab.

2. Click the **Residential Search Quick** icon. The Search Wizard appears.



Figure 7.19 - The Residential Search Quick icon.

3. Find the **Street Name** field. You may need to advance to the second page to find it. To advance to the second page click the yellow **Next** button at the top of the wizard. The **Next** button looks like an arrow pointing right. Only click the **Next** button if you don't see the **Street Name** field on the current page of the Search Wizard. Keep clicking **Next** until you see the **Street Name** field.



Figure 7.20 - The Next button takes you to the next wizard page.

4. Click in the **Street Name** field. Type: <*king*>
5. Run the search by clicking the **Go** button at the top of the wizard. You are taken to a list of search results. If one of your result columns is **Street Name**, you will notice that all of the properties have "king" somewhere in their name. ML King, Martin L. King are possible search results, as well as Buckingham or Kingston.
6. If you wish to modify the search, click the **Criteria Wizard** button. This will bring up a form that will allow you to modify the search.



Figure 7.21 - The Criteria Wizard button.

Note:

A similar search could be run on any text field. Other text field examples are Agent Name, Subdivision, Remarks, and City. Remember to use asterisks on either side of the text you are searching for.

Search on status (List Boxes)

The following example will show you how to search for a particular status. The Status field in Kinnexus is a list box. The process of searching for a particular status is the same for all list boxes.

What to do

1. From the Home Page, click the **Search** tab at the left side of the screen.



Figure 7.22 - The Search tab.

2. Click the **Residential Quick Search** icon. The Search Wizard appears.



Figure 7.23 - The Residential Quick Search icon.

3. The **Status** list box is probably on the first page of the wizard. (If it is not, continue clicking the **Next** button until you see it.) Click in the **Active** check box. You will see a check mark appear in the box. Remove the check mark by clicking in the box again. Click all the items in the **Status** list box that you want. Remember, however, that the more items you select, the fewer results you will receive.

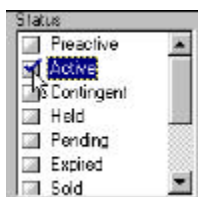


Figure 7.24 - A check mark appears next to the selected statuses.

4. To narrow the search a little you may want to enter a price range in as well. This is only to limit the number of search results and is not necessary. If you don't enter any other criteria you will find all active listings in the MLS. That might take a while to complete.
5. Run the search by clicking the **Go** button at the top of the wizard. You are taken to a list of search results.



Figure 7.25 - The Go button.

6. If you want to go back and modify the search click on the **Edit Criteria** button.



Figure 7.26 - The Edit Criteria button.

Search on swimming pool (Features)

This example will show you how to search for a particular feature. Because the items included in the Search Wizard are entirely determined by your system administrator, there is no guarantee you will have a Feature List in your Search Wizard. If a Feature List is not available, you should skip to the chapter *Search for fields not on the Search Wizard*, page 44.

Kinnexus allows you to search for properties that have or do not have a particular feature. For instance, Kinnexus will let you search for properties that have a swimming pool. It will also let you search for all the properties that do NOT have a swimming pool. You can search on as many items as you want, but it is suggested that you limit your search to just a couple of items, otherwise you might get zero results.

A Feature Group looks like a list box.



Figure 7.27 - A Feature List box.

The boxes can be empty, or have a check mark, or an 'X'. Here is what the marks represent:

Feature Check Boxes	
<input type="checkbox"/> Hot Tub	An empty box with no mark signifies that you are not searching on that particular feature. You don't care whether a search result has that feature or not.
<input checked="" type="checkbox"/> Hot Tub	A check mark means that you are interested in properties with that feature. All search results will have that feature.
<input checked="" type="checkbox"/> Hot Tub	Placing an 'X' in a box means you are only interested in properties without that feature. All search results are guaranteed not to have that feature

Figure 7.28 - Description of search Feature Group check marks.

The following instructions will show you how to find properties with a swimming pool. If you do not have a swimming pool feature in your database, or if the feature is not on the Search Wizard, you can use another feature field or refer to page 44.

Sample feature search

1. From the Home Page, click the **Search** tab at the left side of the screen.



Figure 7.29 - The Search tab.

2. Click the **Residential Quick Search** icon. The Search Wizard appears.



Figure 7.30 - Residential Quick Search icon.

3. Find the **Swimming Pool** check box. It may or may not be on a Search Wizard. If it is not, find another feature field to search, or see *Searching on Anything*, page 44. Once you find a feature to search, put a check mark next to the desired feature by clicking in the box.

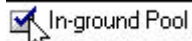


Figure 7.31 - Swimming pool check box.

4. To narrow the search a little, you may want to enter a price range in as well. This is only to limit the number of search results and is not necessary.
5. Narrow the search further by searching only the active listings. Click in the **Active** check box.

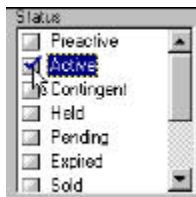


Figure 7.32 - Active check box.

5. Run the search by clicking the **Go** button at the top of the wizard. You are taken to a list of search results.



Figure 7.33 - The Go button

6. If you want to modify the search, click the **Criteria Wizard** button.



Figure 7.34 - The Criteria Wizard button.

Search on dates

This example will show you how to create a Hot Sheet by hand. Through this example you will learn how to search on dates. This example will find all of the properties that were modified yesterday.

There are several date fields in Kinnexus. One of the available fields is called the Last Mod, or last modified date. Any time a listing is changed or otherwise updated, the Last Mod date is set to the current date. This is the field you are going to use for this search. Below are some of the other date fields in Kinnexus. Your particular MLS may or may not use all of these fields, and others might have been created.

Listing Date Fields	
Listing Date	The date the listing agreement was signed.
Creation Date	The date the listing was entered into Kinnexus.
Activation Date	The date the "Activate" button was pressed in Kinnexus.
Contract Date	The date the listing went under contract.
Sold Date	The date the sale was closed.
Expiration Date	The date the listing expires.

Figure 7.35 - Kinnexus date fields. Your database may have additional date fields.

There are several ways to search dates. Here is a list of some of the different ways:

Format For Date Searches		
To Get This	Enter This	Additional Information
December 1-15, 1999	12/1/99 - 12/15/99	
December 1-15, 1999	Dec 1, 1999 - Dec 15, 1999	
December 1-15, 1999	12/1 - 12/15	If you don't specify a year, Kinnexus assumes the current year.
Any date in the last 3 days	Current -3d	D = Days W = Weeks M = Months Y = Years
Any date in the past 2 weeks	Current -2w	You can also use the plus (+) symbol to check dates in the future. This is helpful for open houses.

Figure 7.36 - Examples of searching formats.

Dates after year 2000

The same date formatting applies for years after 2000. This means that the year 2000 can be entered as 2000, 00, or just left blank assuming the current year is 2000. When a two digit year is entered, Kinnexus reads a Windows setting to determine the appropriate year. The default setting assigns the two digit years of 30 and above to the 20th century, and years 29 and below are in the 21st century. You can view this setting by opening the regional settings in the Control Panel and clicking on the Date tab. (Windows 98)

What to do

1. From the Home Page, click the **Search** tab at the left side of the screen.



Figure 7.37 - The Search tab.

2. Click the **Residential Quick Search** icon. The Search Wizard appears.



Figure 7.38 - The Residential Quick Search icon.

3. The **Status** list box is probably on the first page of the wizard. (If it is not, continue clicking the **Next** button until you see it.) Click the **Active** check box. You will see the text become highlighted.

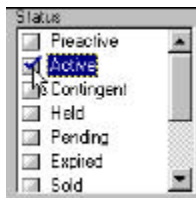


Figure 7.39 - The Active check box.

4. Find the **Last Modified** field. You may have to click the **Next** button to look through subsequent pages until you find it. (If the **Last Modified** field does not appear on the Search Wizard, use another date field, such as **Activation Date** or **Sold Date**. If no date fields have been included on the wizard, see *Search on Anything*, page 44.) Click in the **Last Modified** field and enter: <Current-1d>. This criteria finds all the properties that have been modified in the last day.



Figure 7.40 - The Last Modified field.

5. Run the search by clicking the **Go** button at the top of the wizard. You are taken to a list of search results.



Figure 7.41 - The Go button.

6. If you want to modify the search, click on the **Edit Criteria** button.

Search for fields not on the Search Wizard

Your Kinnexus system administrator is entirely responsible for the items placed on the Search Wizards. The field you want to search may or may not be on the wizard. If a field is not on a wizard, chances are it is on a Search Criteria Form. These instructions show you how to search for fields that are not on the Search Wizard using a Search Criteria Form.

The Search Criteria Form is different from a Search Wizard. It looks like a data entry form or a detailed Search Result Form. Search Criteria Forms vary from board to board. This is a sample portion of what a Search Criteria Form may look like:

District:	<input type="text"/>
Status:	<input type="text"/>
Subdivision:	<input type="text"/>
Price:	<input type="text"/>
Style:	<input type="text"/>
Year Built:	<input type="text"/>
Bedrooms:	<input type="text"/>
Sq. Ft. Total:	<input type="text"/>

Figure 7.37 - Search Criteria Form.

It is easy to compare a Search Criteria Form with a written survey. There are two parts, questions or sentences that are written directly on the paper, and blanks where you enter requested information. Instead of blanks, the Search Criteria Form has brackets. You will fill in as many blanks as you want, and then run the search. You don't need to enter all the criteria before running the search.

Most of the criteria is entered in the same way you entered criteria in the Search Wizard. The one exception is searching numbers. In a Search Wizard you entered a range – you entered a minimum and a maximum value. On a Search Criteria Form, this is how you enter numbers:

Searching on the Criteria Form		
To get this	Enter This	Additional Information
All properties with price between \$120,000 and \$140,000	120000-140000	You don't need to enter the dollar sign and the commas. Kinnexus adds them automatically.
All properties less than \$120,000	<120000	This search actually finds all properties less than or equal to \$120000.
All properties greater than \$120,000	>120000	

Figure 7.38 - Entering number ranges in a single box.

What to do

Here are some instructions for creating a search to find all active properties between \$120,000 to \$140,000:

1. From the Home Page, click on the **Search** tab at the left side of the screen.



Figure 7.39 - The Search tab.

2. Click the **Create Search** icon. The Search Wizard appears.



Figure 7.40 - The Create Search icon.

3. On the left side of the wizard property types are listed. Click **Residential**.



Figure 7.41 - Using the Create Search icon gives you more options than the Quick Search.

4. Make sure that none of the check boxes at the bottom of the wizard have a check mark in them. If check marks do appear, click in the check box to make the check mark disappear.
5. Click the **Search Criteria Form** button. The Search Criteria Form appears.

District:	<input type="text"/>
Status:	<input type="text"/>
Subdivision:	<input type="text"/>
Price:	<input type="text"/>
Style:	<input type="text"/>
Year Built:	<input type="text"/>
Bedrooms:	<input type="text"/>
Sq. Ft. Total:	<input type="text"/>

Figure 7.42 - Search Criteria Form.

6. Click in a field. Your cursor starts blinking in the colored area.

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7. Press the **TAB** key on the keyboard 5 times. Your cursor moves from field to field. Some times a pop-up box may appear. Just press **TAB** again and the cursor moves to the next field. **TAB** takes you forward through the form.
8. Hold down the **SHIFT** key while pressing the **TAB** key. This is called a **SHIFT+TAB**. Pressing **SHIFT+TAB** takes you backwards up the form to previous fields.
9. Press the **TAB** or **SHIFT+TAB** keys until your cursor is in the **Price** field. Type: <150,000-155,000>.
10. Press the **TAB** or **SHIFT+TAB** keys until your cursor is in the **Status** field. A pop-up list of statuses appears. Put a check mark in the **Active** check box.
11. Run the search by clicking the **Go** button at the top of the wizard. You are taken to a list of search results.
12. If you want to modify the search, click the **Edit Criteria** button.

The Search Criteria Form is a powerful tool because it allows you to search on anything in the database. In the *Kinnexus for Advanced Users* manual you are taught how to create your own search forms.

Test your knowledge

Answer the questions below. If you need help with one of the answers, refer to one of the previous search chapters or ask someone. Be sure to write down any hints you may need next time to help you remember.

1. How many residential listings are active between \$140,000 - \$150,000?
2. How many active residential listings have a swimming pool?
3. How many residential listings expired last week?
4. How many active listings are on streets that begin with the letters 'Ch'?

SAVED SEARCHES

Kinnexus searches are temporary by default. This means that unless you tell Kinnexus to save a search, each time you run a search the old one is overwritten. Choosing to create a Saved Search allows you to come back and look at the results again without having to re-enter the criteria. This is especially helpful for tracking clients/customers or farming a particular area. This chapter will show you the basics about saving searches. You will learn how to create a new Saved Search, how to examine and update a Saved Search, and how to delete a Saved Search when you are done with it.

Create a Saved Search

A Saved Search can save you a lot of time entering search criteria. You can create as many Saved Searches as you desire. You must designate a search as a Saved Search at the time you create the search. You cannot create a temporary search and change it to be a Saved Search in the future. These instructions will show you how to create a new Saved Search:

What to do?

1. From the Home Page, click the **Search** tab.



Figure 8.1- The Search tab.

2. Click the **Create Search** icon. The Search Wizard appears.



Figure 8.2 - The Create Search icon.

3. Property types are listed in the **Type** field. Click **Residential**.



Figure 8.3 - The Search Wizard.

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4. Select the **Save this search for auto prospecting** checkbox at the bottom of the wizard.

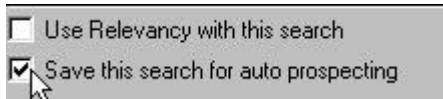


Figure 8.4 - This check mark designates a Saved Search.

5. Click in the **Description** field at the top of the wizard. Press the **DELETE** or **BACKSPACE** key until the box is empty

6. Type in a name for the search.



Figure 8.5 - Call a search anything you want.

7. The entire dialog box should now look like this:



Figure 8.6 - The Search Wizard.

8. Click the **Next** arrow button at the top of the wizard. This will take you into the residential Search Wizard, or the property type you selected.
9. Enter whatever search criteria on the Search Wizard pages you desire. Click the **Go** button at the top of the wizard to run a search, and use the arrows to move to the next and previous wizard pages.
10. Once you have successfully run the search, your search is saved.

Returning to a Saved Search

Once a search has been saved, you can return to it at any time and modify the criteria or review the results.

Beforehand

These instructions assume you have already created a Saved Search. If you haven't created a Saved Search, see *Create a Saved Search* on page 47.

What to do

1. From the Home Page, click the Search tab at the left side of the screen.



Figure 8.7 - The Search tab.

2. Click the Search Portfolio icon. A list of Saved Searches appears

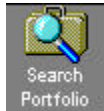


Figure 8.8 - The Search Portfolio icon.

3. Double click the name of the Saved Search you want to view. You are taken to an updated list of search results.

How do I know which results are new?

Each time you go to a Saved Search, Kinnexus marks which search results are new since the last time you looked at the list. The text by default is black. Kinnexus changes the text color of all new search results. The color changes as soon as you double click the listing. They will remain a different color until you double click them.

Kinnexus reports on the To Do List when a saved search has new results. You can click the name of the search in the To Do List to jump directly to the search results.

Deleting a search

As a general rule, you can delete any of the searches in your Listing Portfolio except those that were created by your office or system administrator. These instructions will show you how to remove a search from your Search Portfolio:

Beforehand

- These instructions assume that you are looking at the Home Page. If you are not currently at the Home Page, click the **Home** button at the top right of the page.



Figure 8.9 - The Home button.

What to do

1. Click the Search tab at the left of the screen.
2. Click the Search Portfolio icon. A list of your searches appears.
3. Click the search you would like to delete. The line becomes highlighted
4. Click the Delete button on the left side of the Next Step Bar. The search is removed from the list.



Figure 8.10 - The Delete button.

Tip

If you have more than one search to delete, you can hold down the **CTRL** (Control) key on the keyboard and click all the searches you want to delete, and then click the **Delete** button.

SEARCH RESULTS

The previous chapters have taught you how to search the database. This chapter will cover how to view search results. Because of the many possibilities of a Search Result List, this chapter will refer you to many other places in the manual. This chapter covers how to move between Listviews and detailed forms of the search results. Information about customizing the Listviews and printing can be found in later chapters.

There are three ways to examine search results: a Listview, a Search Result Form, and a list of forms. Each has its advantages.

Listviews

After running a search you are shown a Listview of search results. A Listview shows one line for each search result. This is what a Listview looks like.

Street #	Street	City	Built	Price
28 Total items in Residential Temporary				
11125	W. GLEN	Vienna	1997	\$209,000.
6082	Bloss Court	Swartz Creel	1992	\$229,000.
5291	OWEN ROAD	Linden	1976	\$213,000.
14180	HOGAN ROAD	Linden	1965	\$215,000.
6184	Pine Creek Cross	Grand Blanc	1992	\$209,900.
5291	Tenitorial	Grand Blanc	1980	\$215,000.
708	Boutell	Grand Blanc	1977	\$219,900.
619	Applegate	Grand Blanc	1985	\$225,000.
703	MORNINGSIDE I	Grand Blanc	1997	\$249,900.
570	CHASSEUR	Grand Blanc	1996	\$249,900.
12509	Henderson Rd	Forest	1996	\$219,900.

Figure 9.1 - Search Result Listview.

Listviews are nice because you can see information about many different properties at once. Descriptions for customizing Listviews are in Chapter 13.

Printing a listview

Printing a Listview is very easy. There are two convenient methods you can use. One method is to choose **File<Print**.

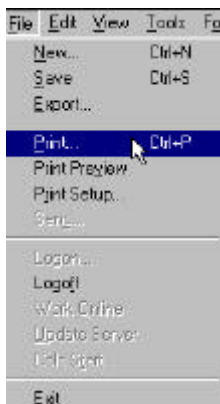


Figure 9.2 - You can print results using the File menu.

Another way to print the Search Result Listview is to use the **Print** button in the toolbar at the top of the page.



Figure 9.3 - You can also use the Print button in the action toolbar.

After starting the print process using either of the two methods described above, the **Print** dialog box appears. Just click the **OK** button at the bottom to start printing.

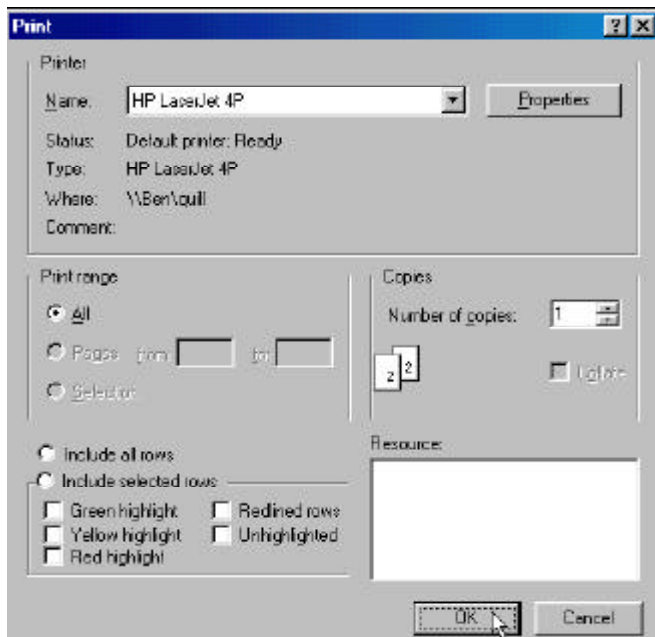


Figure 9.4 - The Print dialog box.

Modify the search

Sometimes you receive too many search results and want to narrow the search so you can obtain fewer results. There are two buttons on the Next Step Bar that allow you to modify a search: **Criteria Wizard** and **Criteria Form**.



Figure 9.5 - Two ways to modify a search.

The quickest way to modify a search is to click the **Criteria Wizard** button. It takes you back inside the Search Wizard and allows you to modify any of your search criteria. The **Criteria Form** button lets takes you to the Search Criteria Form and lets you search for fields that are not on the Search Wizard.

Search Result Forms

The Search Result Listview only shows you one property per line. Although it is true that you can customize the columns to your liking, you will never see more than one property per line. The Search Result Forms allow you to see more detailed information about a property.

To see a form of one of your search results, double click the listing in the Search Result Listview.

11125	W. GLEN	1997	\$209,000.
1181	HEATHERWOOD	1996	\$209,000.
10490	DENTON CREE	1997	\$209,900.

Figure 9.6 - A Listview of search results.

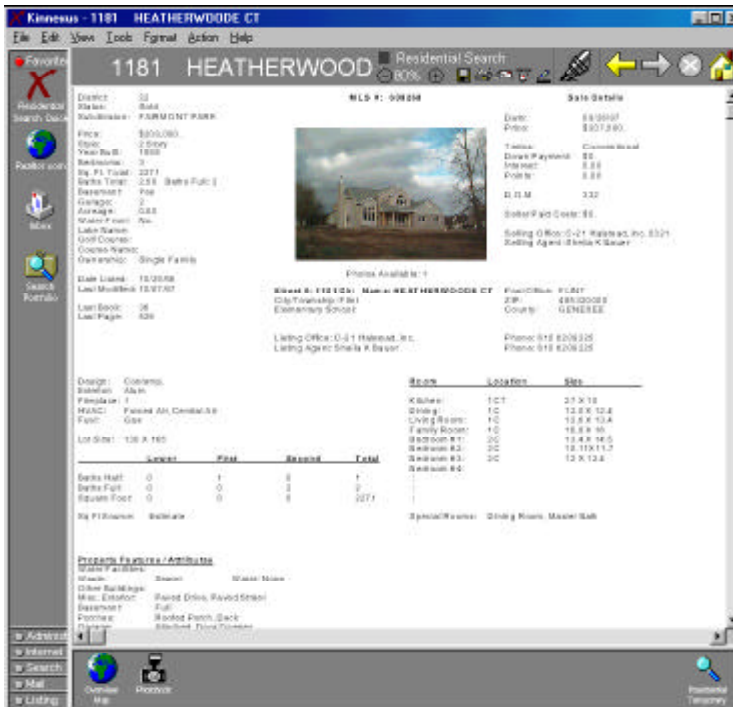


Figure 9.7 - A Search Result Form.

Different forms

The system administrator designates the default form that you will see when you double click on a search result, but there are many other forms that you can use. The Current Form Indicator in the toolbar shows the name of the form currently being used. To change the current form, click on the Current Form Indicator, and select a new form from the list.



Figure 9.8 - The Current Form Indicator shows Residential Search.

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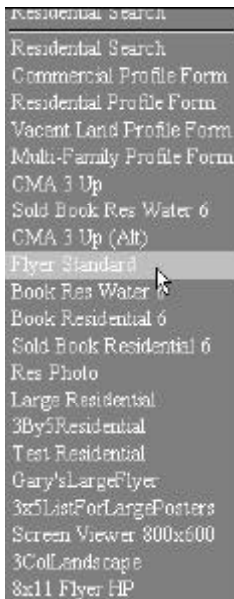


Figure 9.9 - The list shows all available forms.

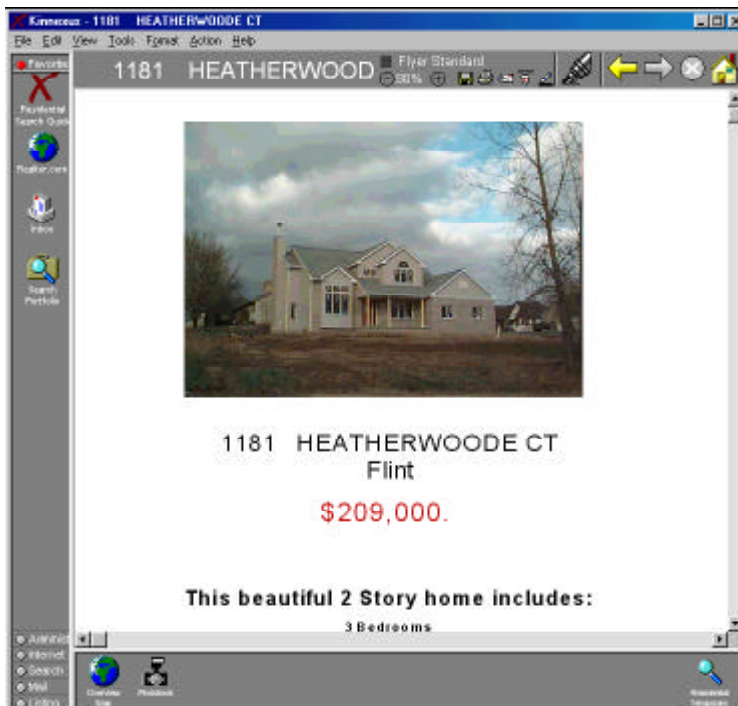


Figure 9.10 - This is the same search result but it's displayed using a different form.

Some of the forms are designed to look like flyers or handbills. Others are small and show only a photo and summary information about the property. The *Kinnexus for Advanced Users* manual explains how you can customize and create your own flyers.

Extra photos

Although it is possible to have more than one photo on a form, most forms show only one photo. If you want to see all of the photos entered for a property, click the **Photos** button on the Next Step Bar. The button only shows up when you are looking at a Search Result Form.



Figure 9.11 - This button displays the Picture Information window.

Below is the **Picture Information** window. It shows all photos available for a property. A scroll bar appears at the bottom of the window that allows you to see all of the photos, if all of the photos do not fit in the window.

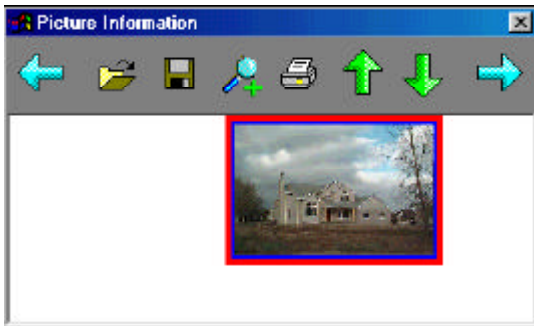


Figure 9.12 - This window shows you all of photos that have been entered for a property.

Close the **Picture Information** window by clicking the small 'x' button in the top right corner of the dialog box.

Back to the Search Result Listview

From the Search Result Forms you can return to the Listview of results by clicking the **Back** button at the top of the screen.



Figure 9.13 - The Back button.

Select from a list of photos

Kinnexus Listviews are very powerful. In normal mode, the Listviews show only one line per property. However, you can also make the Listview display photos. This is how you make Kinnexus show a screen full of photos:

Assuming you are looking at a Listview of search results, click the **Current Form Indicator** above the **Zoom** indicator. A list of possible forms appears. You can select any report in the list, but find one that looks something like 'Photo 3x3,' 'Photo Report,' or even "Res Photo." Something in the name should give away that its primary function is to show photos.



Figure 9.14 - Changing the Listview to a list of photos.

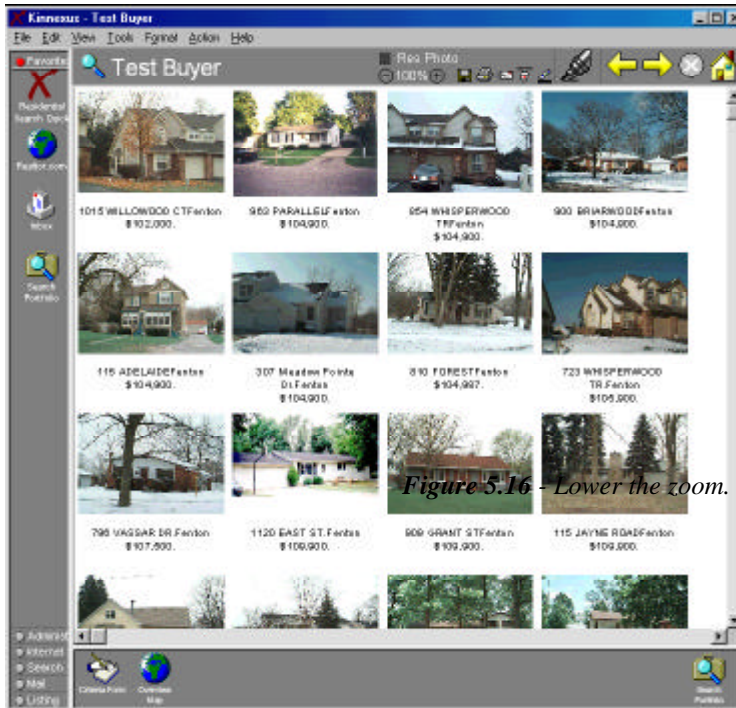


Figure 5.16 - Lower the zoom.

Figure 9.15 - Viewing search results as a list of photos.

Change the photo page zoom

You can fit more photos on the screen if you lower the zoom factor. This is like moving a paper farther away from you. Click the **Zoom “-”** button on the toolbar.

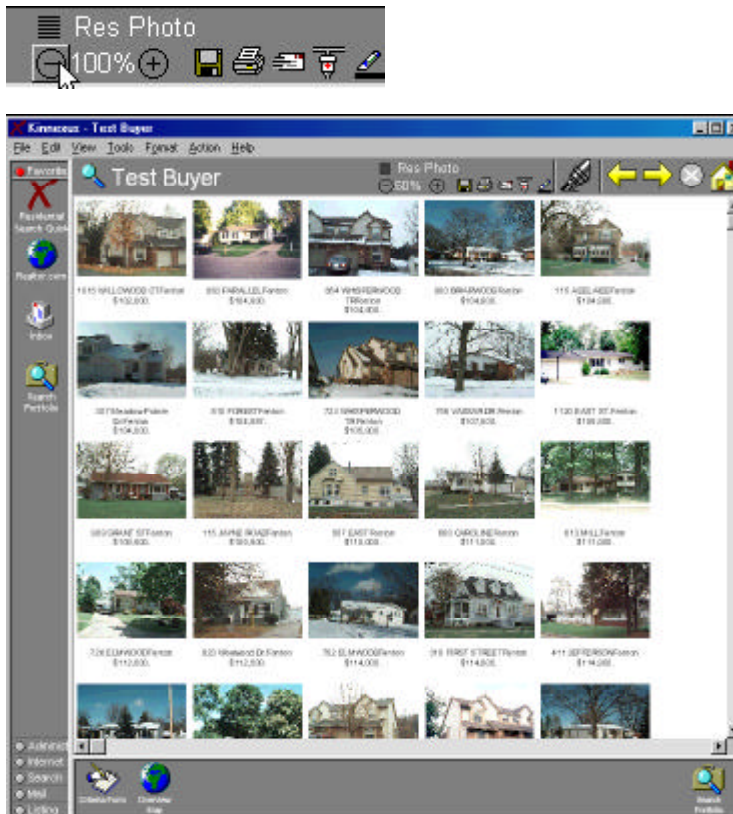


Figure 9.17 - With a lower zoom more photos fit on the screen.

If you want to make the photos larger you can raise the zoom factor. This is like moving a paper closer to you. Click the **Zoom “+”** button on the toolbar.

Select a photo

You can select a listing from the photo view the same as you can from the Listview. Simply double click one of the photos and you are taken to the property form of the result you selected.

More information

There are many more features that can be used with search results. Entire sections and chapters have been devoted to Listviews and printing. More information is also available in the *Kinnexus for Advanced Users* manual.

SEARCH TUTORIAL

Now that you have all of the pieces, here is a tutorial that can help you put them together. This chapter demonstrates many of the principles taught in this section and guide you step by step through the following processes:

- Creating a quick search
- Searching using numbers
- Revising a search
- Printing a list of search results
- Viewing detailed listing information
- Printing a detailed form
- Viewing photos of all the search results.

This guide is meant to take all of the mystery out of searching and search results. There are a lot of graphics to help you along.

Searching

1. Start this tutorial from the Home Page. If you are not at the Home Page, click the **Home** button in the top-right corner of the screen.



Figure 10.1 - Home button.

2. Click the **Favorites** tab.



Figure 10.2 - The Favorites tray.

3. Click the **Residential Quick Search** icon. The Search Wizard appears. This is the quickest way to start a temporary, residential search.



Figure 10.3 - The Residential Quick Search icon.

4. Click in the **Price** field on the first page of the Search Wizard. Notice that a blinking line is now in the box.

Note:

The following instructions and graphics assume that you have only one field next to search items dealing with ranges. It is possible that your system administrator has chosen to display fields dealing with ranges, such as **Price** and **Bedrooms**, as two fields side-by-side. If you come across a search item dealing with ranges that has two fields side-by-side, enter the minimum value in the left field, and the maximum value in the right field.

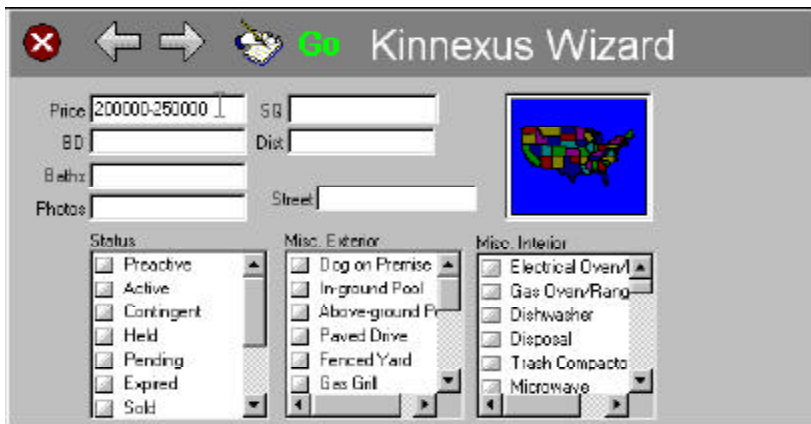


Figure 10.4 - Quick Search Wizard. Your wizard should look similar.

5. In the **Price** field, type: <250,000-250000>. This is the price range for the search. Again, you don't have to type the comma.



Figure 10.5 - The Price field

6. Find the **Status** list box. Click in the **Active** check box. A check mark appears in the box.



Figure 10.6 - The Active check box in the Status list box.

7. Click the **Go** button at the top of the wizard. This starts the search. You are taken to a list of search results.



Figure 10.7 - The Go button.

8. How many search results are there? _____

Revise the search

9. Suppose the number of results you received is too many, and you want to revise the search to retrieve fewer results. Click the **Criteria Wizard** button on the Next Step Bar at the bottom of the screen. The Search Wizard reappears.



Figure 10.8 - The Criteria Wizard Button.

10. Notice that the criteria you entered before is still entered in the wizard. Click in the **Price** field. After you click in the box, a vertical line will start blinking in the box.



Figure 10.9 - Previous criteria in the Price field.

11. Use the **BACKSPACE** and **DEL** keys on the keyboard to erase the number(s) in the **Price** field.



Figure 10.10 - Modified criteria in the Price field..

- Type in a new maximum range of: <225,000>.

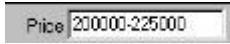


Figure 10.11 - Modified criteria in the Price field.

- Click the **Go** button again.



Figure 10.12 - The Go button.

How many results did you receive this time? _____

Sorting a column

- Locate the **Price** column in the search result Listview. Click the **Price** column header. This sorts the list based on the price. Notice that a little arrow appears next to price. The direction of the arrows informs you if the list is sorted up or down.



Figure 10.13 - Descending column sort.

- Click the **Price** column header again. This flips the arrow, and changes the sort.



Figure 10.14 - Ascending column sort.

Print the list of search results

- It is very easy to print this list. Choose **File>Print**. A **Print** dialog box appears.

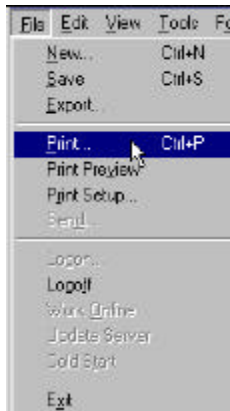


Figure 10.15 - The Print option on the File menu.

17. Click the **Print** button on the **Print** dialog box to send the list to the printer.

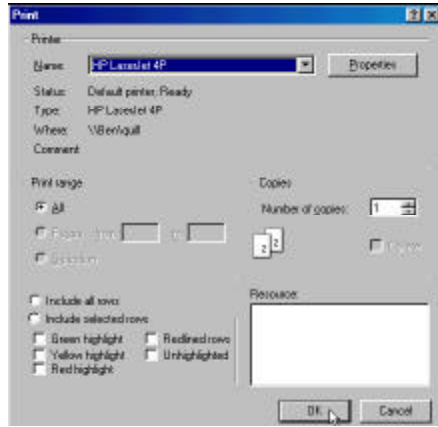


Figure 10.16 - The Print dialog box.

Examine a search result

18. Double click a search result in the list. The view changes to show you a form of the search result.

Street #	Street	Built	Price	BD	Street #	Street	Built	Price	BD
18 Total items in Residential Temporary					18 Total items in Residential Temporary				
619	Applegate	1965	\$225,000.	3	619	Applegate	1965	\$225,000.	3
399	Coutant	1936	\$220,000.	6	399	Coutant	1936	\$220,000.	6
4919	Cassey Rd	1990	\$219,900	3	4919	Cassey Rd	1990	\$219,900	3

Figure 10.17 - A Search Result Form.

View different forms

19. There are several ways Kinnexus can show the listing on the screen. Click the **Current Form Indicator** to see the list of available forms.



Figure 10.18 - The Current Form Indicator.

20. Click one of the forms. See how the screen changes to show the new form. Take the time to go through each of the forms, each time clicking the **Current Form Indicator** and selecting a different form.
21. One of the forms will have a photo and just a little bit of information under the photo. Write the name of that report here: _____ It will look something like this:



Figure 10.19 - Name the report.

14180 HOGAN ROAD Linden
\$215,000.

Return to the search result list

22. Click the **Back** arrow at the top of the screen to go back to the Search Result Listview.



Figure 10.20 - The Back button.

View a list of photos

23. You should now be looking at the list of search results. Click the **Current Form Indicator** and select the form you wrote in on step 21. Several small photos should show up on the screen.

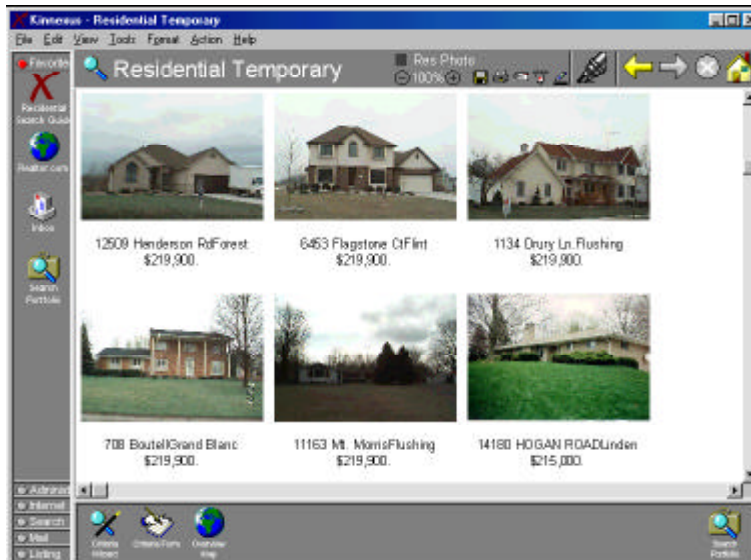


Figure 10.21 - Photo view at 100% zoom

24. Click the **Zoom “-”** button. Now you can see more photos on the screen.

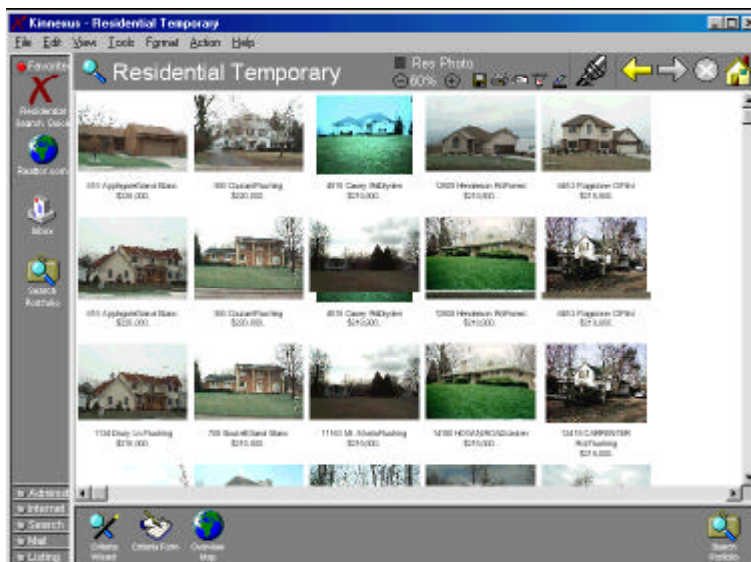


Figure 10.22 - Photo view at 80% zoom

25. Click the **Zoom “+”** button. The zoom is returned to normal.

26. Click the **Zoom** “+” button again. The photos are made larger, but not as many fit on the screen.

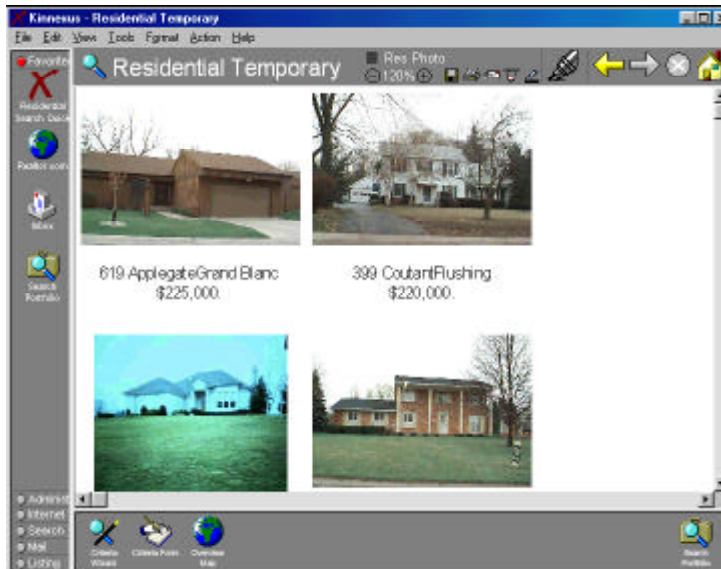


Figure 10.23 - Photo view at 120% zoom

27. Click the **Zoom** “-” button to return the zoom to normal (100%).
28. Double click one of the photos. You are taken to the Search Result Form of the property you selected.
29. Click the **Home** button to return to the Home Page.



Figure 10.24 - The Home button.

SECTION 4

MANIPULATING COLUMNS

There are many places in Kinnexus where data is presented in a column. The official term for the column page is “Listview.” Listviews are lists of items – a list of search results, a list of your inventory, a list of Realtors, or a list of forms. The following chapters will help you learn how to use Listviews. You will learn how to sort columns, add and remove columns, reorder columns, and how to highlight and print columns.

Listviews in Kinnexus are extremely powerful. You can use them to create statistical reports or simple books of listings. This manual covers the basic points of creating listviews. More information regarding Listviews is found in the *Kinnexus for Advanced Users* manual.

This section is divided into the following chapters:

Chapter 11: Column Basics

Chapter 12: Highlighters

COLUMN BASICS

CHAPTER

11

This chapter demonstrates the basic skills needed to use columns in Kinnexus. You will learn how to sort, add, remove, re-size, and reorder columns. These skills are very basic, and understanding how to perform them will greatly enhance your ability to harness the power of Kinnexus.

Street #	Street	Built	Price	BD
28 Total items in Residential Temporary				
619	Applegate	1985	\$225,000	3
6158	Beecher Rd	1996	\$209,900	3
6082	Bloss Court	1992	\$229,000	4
708	Boutell	1977	\$219,900	4
12418	CARPENTER Rc	1894	\$215,000	4
4919	Casey Rd	1990	\$219,900	3
570	CHASSEUR	1996	\$249,900	4
399	Coutant	1936	\$220,000	6
1134	Drury Ln.	1988	\$219,900	3
16495	DUSKLIGHT	1998	\$249,900	3

Figure 11.1 - A Listview of search results.

Sort a list of search results

You can sort a Listview by any of its columns by clicking the column header. If you are not looking at a Listview, run a search on the database as described on page 36. Figure 11.1 shows what a Listview looks like.

1. Click the column header you would like to sort. The column is sorted. Notice that an arrow now appears in the column header. The arrow informs you if the list is sorted up (ascending) or down (descending).
2. Click the column header again to reverse the sort order.

What do the arrow colors mean?

The colors designate which column is the primary, secondary, tertiary, and quaternary sort orders. Suppose you want to see a list of search results sorted by city, but within each city you wanted the results sorted by price. In this case, city would be the primary sort and price would be the secondary sort. See the instructions below to use sort orders.

Sort by multiple columns

1. Make sure that you have **City** and **Price** columns in your Listview. If they do not appear, use other columns that appear in your search result Listview.
2. Click the **Price** column header. This makes **Price** the primary sort column, meaning the entire list is sorted by price.
3. Click the **City** column header. This makes **City** the primary sort column, and forces **Price** to be the secondary sort column. Notice that the entire list is sorted by city, and within each city the results are ordered by price.

Add a column

The column list in Kinnexus is completely customizable. This chapter will teach you how to add columns to a Kinnexus Listview.

Beforehand

- You should make sure you are looking at a Listview. One of the easiest ways to get to a Listview is to run a search. If you need help running a search see page 36.
- Click the **View** menu. Make sure that a check-mark appears next to **Layout Tree** on the **View** menu. If there isn't a check mark, click **Layout Tree** and the window appears.

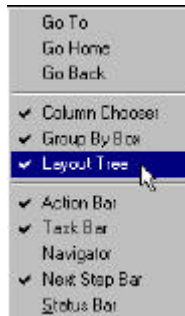


Figure 11.2 - The View menu.

What to do

- Position the Listview so you can see where you would like the new column to appear.
- Click the plus (+) next to **Property** or one of the other tables in the **Layout Tree**. Find a field that you would like to add.
- Click the field you want to add and hold down the left mouse button. While holding down the left mouse button, move the mouse along the column headers until it points to where you want the new column to appear. Your mouse pointer must be in the column headers and a red line should appear between the two columns when your mouse is in the correct position. Release the mouse button when the red line appears where you want the new column to appear.

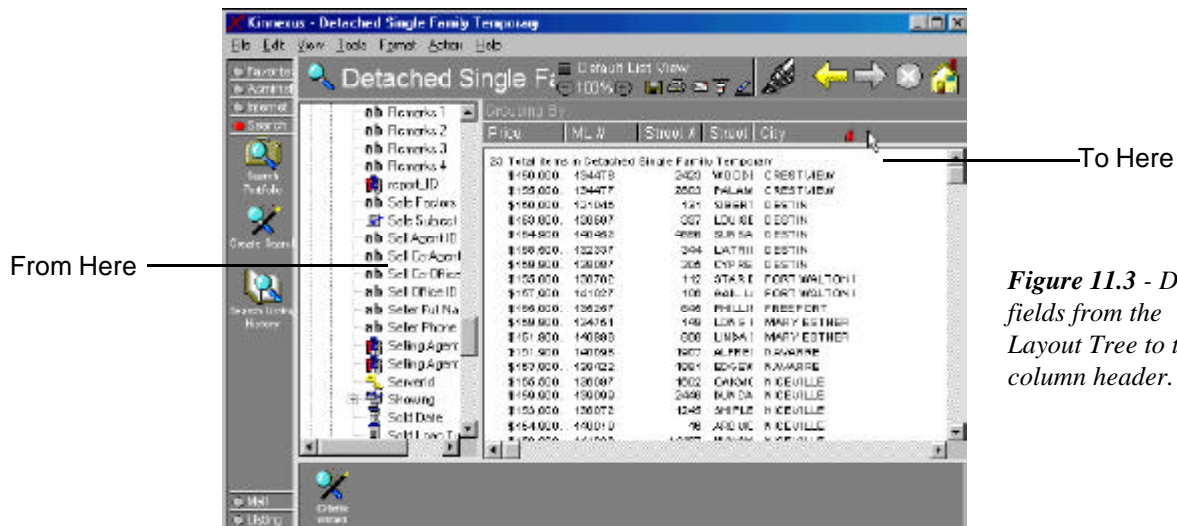



Figure 11.3 - Drag fields from the Layout Tree to the column header.

Note:

If the red line does not appear, make sure that you are holding down the left mouse button. Another common problem is that you did not drag the field from the Layout Tree. Make sure the mouse is directly over the field before you hold down the mouse button.

If you are dragging correctly, this symbol appears as you begin dragging the field.

 **Figure 7.4 - The dragging symbol.**

The symbol displayed below appears when your mouse is at a location where you could add, or “drop” a new column.

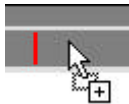


Figure 11.5 - The drop symbol.

Why are there different tables in the Layout Tree?

Much like a grocery store divides up its products into groups, Kinnexus divides all fields into several tables to help you find them faster. Here is a list of the different tables in the Layout tree and the types of fields you will find in each:

Table Categories		
Table	Description	Sample Fields
Agent	The agent table has all of the fields that describe the listing agent.	Name, phone number
Office	The office table has all of the field that describe the listing office.	Price, expiration date, last modified date.
Common Listing	The Common Listing table has all of the fields common to all property types. All property types, for instance, have a price field. Therefore the price field is in the Common Listing table.	Address, tax numbers, city, price
Residential (Property type)	The residential table is included if you are looking at a residential property. If you are looking at a Land listing, a Land table is included. This table contains the fields that are specific to a property type.	Square feet, bedrooms, bathrooms

Figure 11.6 - Table types

Remove a column

You can remove any Listview column. For this example you need to be looking at a Listview. If you are not looking at a Listview, run a database search as described on page 36.

1. Place your mouse pointer over the column you would like to remove. Click and hold down the left mouse button. Drag the mouse into the Listview. Release the mouse when you see this symbol:



Figure 11.7 - The Release symbol.

2. Repeat the process for each column you want to remove.

Re-sizing a column

Any column can be made wider or narrower. If you are not looking at a Listview, run a database search as described on page 36. You may have to use scroll bars at the bottom of the screen to move the Listview until you can see the column you would like to re-size.

1. Place your mouse pointer in the column header of the column you would like to re-size.
2. Move your mouse to the right until it is directly over the line that separates the column headers. Notice that your mouse pointer changes from a single arrow to a double pointed arrow.
3. When you see the double pointed arrow, hold down the left mouse button.
4. While holding down the left mouse button, move the mouse to the right or left.
5. When the column is the desired width, release the mouse button. The column is re-sized to your specified width.
6. Repeat the process for each field you want to re-size.

Automatically re-sizing

Kinnexus knows the optimum width of each column. The optimum width is just wide enough so that the text of each line is visible. To have Kinnexus automatically size a column, follow these instructions:

1. Move your mouse over the line separating column headers as described in step 2 above.
2. Instead of holding down the left mouse button, double click it. The column is auto-sized.

Reordering columns

You can change the order of any column in Kinnexus. Any column can be in any position. This is helpful when you are printing lists and want the most important columns to the left. You may have to use scroll bars at the bottom of the screen to move the Listview until you can see the column you would like to move.

1. Place your mouse pointer in the middle of the column header of the column you would like to move.
2. Hold down the left mouse button and move your mouse pointer through the column headers until it is where you would like the column to appear. Notice that the line separating the column header turns red as your mouse passes by.
3. Release the mouse button.

HIGHLIGHTERS

CHAPTER

12

This chapter will show you how to organize the search results using highlighters and how to print the selected listings.

It is quite normal when reading a textbook or looking over lists of data to use a highlighter to make specific lines stand out. In much the same way, Kinnexus uses highlighters to organize items in a Listview and to hide unwanted items. There are five types of highlighters you can use: Red, Yellow, Green, Normal (blue) and Strike-out. There is nothing significant about the different colors. You can use them however you choose. You may designate a particular color to mean you want to show that particular property to a client/customer. Perhaps another color means you have already shown a property, and yet another designates that you are not interested in the property.

These instructions will help you learn how highlighters work. If you are not looking at a Listview, you should run a database search as described on page 36.

Highlighting Items

There are two steps to highlighting items. First, select the items you want to highlight. Second, paint them a particular color. These instructions demonstrate several ways to highlight search results.

1. Select the items you want to highlight. There are three ways to select items in a Listview. Each method has its advantage:

Clicking Methods		
Method	What to do	Advantage
Single click	Use the left mouse button to click on the line you want	Clicking on a single line removes all previously selected lines.
CTRL + click	Hold down the CTRL key on the keyboard then select all the items you want to select.	As long as you hold the CTRL Key, all selected items will remain highlighted.
SHIFT + click	Click on the first item you want. Then hold down the SHIFT Key. Finally, click on the last item you want selected.	This method is great for selecting a large number of search results that are next to each other.
Double Click	Double clicking is not used with highlighters.	

Figure 12.1 - Highlighting methods.

2. Once you have selected the items you want to highlight, click the **Select Highlighters** button on the toolbar. A list of highlighter colors appears.



Figure 12.2 - Highlighter options.

3. Click the color you desire. The selected items change to the color you designated.

Unhighlighting items

To unhighlight items, click the **Select Highlighters** button and choose the black highlighter. The black highlighter removes all highlighting.

Printing highlighted colors

Any group of highlighted listings can be printed separate from the whole list. If you have a large list of search results and only want to print a few, using highlighters is the best method to choose. Follow these instructions.

1. Hold down the **CTRL** key on the keyboard and use the mouse to click the listings you want to print. The listings become highlighted as you click on them.
2. Click the **Select Highlighters** button. A list of highlighter colors appears.
3. Click the yellow highlighter. The selected listings in the Listview become highlighted yellow.
4. Choose **File>Print** from the menu. The **Print** dialog box appears.
5. At the bottom of the **Print** dialog, select the **Yellow highlighter** check-box. This restricts printing to the items highlighted yellow.
6. Click the **Print** button. The yellow items are sent to the printer.

Incidentally, the highlight color is not sent to the printer. Selected items are printed in plain text.

SECTION 5

MANAGING LISTINGS

Kinnexus provides a versatile environment to enter and maintain your listings. As has been noted in previous chapters, because of the customizable nature of Kinnexus, it is possible, even probable, that what you see on the screen will not exactly correspond with the graphics provided in this manual. The instructions are written in such a way that field order is not important.

The chapters in this section will show you how to add and maintain your listing inventory. You will learn how to add multiple photos to your listings, and how to mark a listing as sold.

Here is a list of the chapters in this section:

- Chapter 13: Listings
- Chapter 14: Photos
- Chapter 15: CMAs
- Chapter 16: Listing Scenarios

LISTING BASICS

This chapter will give you a brief overview of the different parts of Kinnexus that are used to add and modify listings. Understanding the different parts will make it easier for you to maintain your listings.

The basic parts involved in adding and maintaining a listing in Kinnexus are:

- Listing Portfolio
- Sold Listing Portfolio
- Lost Listing Portfolio
- CMA Listing Portfolio
- Listing Wizards
- Listing Data Entry Form
- Photos
- Mapping
- Listing System Tray

Listing Portfolio

The Listing Portfolio is a Listview of all of your listings that are either active, on hold, contingent, pending, or pre-active (you haven't finished entering them yet). As with all Listviews, you can add and remove columns, change column widths, and change the sort order of the list. Double clicking on a Listview entry will take you to a data entry form of that property. For more information about adding columns or other Listview features, see the *Columns* section on page 65.

Sold Listing Portfolio

The Sold Listing Portfolio is the final resting-place for listings listed as sold. Only your system administrator can remove items from your Sold Listing Portfolio, but you can hide the older items you no longer wish to access. For information regarding hiding columns, adding columns, or other Listview features, see *Columns* on page 65.

Lost Listing Portfolio

The Lost Listing Portfolio is for listings you listed that did not sell. These are withdrawn or expired listings. If you accidentally forgot to extend the expiration date on a listing, it is possible to retrieve it from the Lost Listing Portfolio, and reposition it in your listing portfolio.

CMA Listing Portfolio

The CMA Listing Portfolio contains temporary listings that have been entered as a Subject Property for a CMA. They are not part of your inventory.

Listing Wizard

The Listing Wizard is used to create new listings and steps you through many of the required fields. It also allows you to designate the listing agent for a listing, just in case you are adding the listing for someone else. Again, this is one of many things that can be customized in Kinnexus. There are several features on the wizard.

1. Cancel button – Use the Cancel button any time you want to cancel out of the Listing Wizard.
2. Previous button – The Previous button returns you to the previous wizard page.
3. Next button – The Next button takes you to the next wizard page. If the arrow does not have color, you are at the end of the wizard.
4. Form button – When you are at the end of the Listing Wizard, you should click the Form button. The Form button will take you to the listing input screen. All listing fields are contained on the Listing Input Form.
5. Fields – Use the TAB key to jump between the different fields. Your system administrator chooses which fields appear on the wizard.

Listing Data Entry Form

The Listing Data Entry Form contains all of the listing fields, including those that you filled in on the Listing Wizard. If you wish to add a field not on the Listing Wizard, you can find it on the Listing Data Entry Form. The TAB key will jump you from field to field. .

Photos

You can add as many photos to a listing as you want. Your system administrator can monitor the number of photos that you add to a listing and may choose to set a lower limit than the one contained in Kinnexus by default. All that you need to enter or update a listing photo is an electronic copy of the photo, either from a digital camera or a scanner. For more information about entering and maintaining listing photos, refer to *Adding a Photo* on page 81.

Mapping

Kinnexus has integrated mapping. After entering the listing address, Kinnexus should be able to determine on a map where the listing is located. You can verify the location on a map, and adjust the location if necessary. You can zoom in on a map to show all of the street information, or zoom out to show you where the property is located in relation to the rest of the community.

Listing System Tray

The tabs at the left side of the Home Page contain the major parts of the Kinnexus program. One of the tabs is the **Listing** tab. The **Listing** tab contains icons that link to many of the listing parts described above.








Listing System Tray Icons		
Icon	Name	Description
	Listing Portfolio	Clicking on the Listing Portfolio button takes you to a list of all your listings that are either active, on hold, contingent, pending, or pre-active (pre-active listings are ones that you haven't finished entering yet).
	Sold Listing Portfolio	All the listings you have sold appear in your sold listing portfolio.
	Lost Listing Portfolio	The Lost Listing Portfolio contains all of the listings you had at one point, but were either withdrawn or expired.
	CMA Listing Portfolio	The CMA Listing Portfolio contains temporary listings that have been entered as a subject property for a CMA. They are not part of your inventory.
	Create Listing	Use this command to begin entering a new listing.
	Create CMA	Use this command to perform a basic CMA.
	Find Listing	Find Listing is a utility to help you locate the listings you have permission to edit.

Figure 13.1 - Listing tab icons.

From any Listview, whether it be the Listing Portfolio, Sold Portfolio, or Lost Listing Portfolio, you can double click a line to take you to the Listing Form of that particular property.

Adding a listing

Your system administrator can grant you permission to enter your own listings into the database. This chapter will show you how to create new listings and fill the listing records with information.

There are two parts to adding a listing. The first part shows you how to enter information into the Listing Wizard. The Listing Wizard contains a few of the required fields. More than likely, you will not enter all of the fields in the Listing Wizard. You will need the second part, or the Listing Form, to complete the data entry process. All of the listing fields should be present on that form, both required and non-required fields. Entering as much information as possible about a listing is advantageous to you as a listing agent. Because of the methods Kinnexus uses to search the database, your listing is more likely to be a match if you have complete information.

If you are not at the Home Page, click the **Home** button at the top-right corner of the screen.

Part 1: The Listing Wizard

1. Click the **Listing** tab at the left of the screen.
2. Click the **Create Listing** icon. The Listing Wizard appears. Your system administrators can customize the Listing Wizard, so it may look different than the one pictured here.



Figure 13.2 - The Create Listing icon.

3. The first page of the Listing Wizard probably asks you to designate a property type and specify the listing agent. Click on the property type of the listing you are adding.



Figure 13.3 - The Listing Wizard.

4. Click your name in the **Owner** window, or the name of the person for whom you are entering the listing. If you only have rights to add listings for yourself, only your name should appear in the left window.
5. Click the **Next** button (the right arrow at the top of the page) to go to the next page of the wizard.



Figure 13.4 - The Next button.

6. The second page of the wizard has field information. Usually the page contains a **Listing Price**, **Expiration Date**, and other various fields. Some or all of these fields are required. It is up to your system administrator to designate whether you can progress through the wizard without entering information in one of the fields. Use the **TAB** key to jump between the fields.



Figure 13.5 - The Listing Wizard field information.

7. What you do next depends on how many pages your system administrator has created in your Listing Wizard. If the **Next** button still has color, your system administrator has other wizard pages for you to enter. Click the **Next** button and enter the desired and/or required information on each page. When you come to the end of the wizard, the **Next** button becomes gray. Click the **Go to Form** button. Your view will change to show you a detailed Listing Form.



Figure 13.6 - The Go to Form.

Part 2: The Listing Form

Much like a Search Form, there are two parts to a Listing Form – text labels and fields. To enter data you will click in one of the fields with the yellowish background and a cursor will start blinking. Enter the data you want, then press TAB to go to the next field. You can skip to any fields you want by clicking the mouse in any field in which you want to enter information.

Some fields will have pop-up dialog boxes, depending on the type of field. Below are examples of some of the dialog boxes, and how to appropriately answer them:

Boolean Fields

Click in the box to enter a check mark if the listing has that particular field. A check mark means true, leaving it blank implies false.

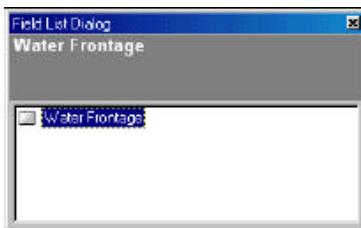


Figure 13.7 - Boolean fields dialog.

List Box

A list box is a list of options from which you can select only one item.

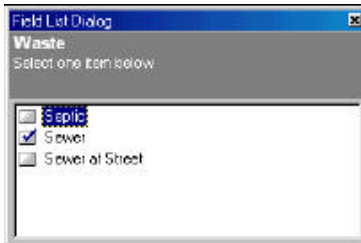


Figure 13.8 - The List Box dialog.

Feature Box

A Feature Box is a list of options from which you can select all that apply.



Figure 13.9 - The Feature Box dialog.

Combo Box

A combo box is a list of text options. You can select an item from a list, or, if the item you want doesn't appear in the list, you can type in your own response.

What if I don't have all the information right now?

If you don't have all the necessary information right now, you can save the listing and come back later and add the necessary data. To save the listing, choose **File>Save** from the menu. The listing will be saved as a pre-listed listing, which means it is not actively on the market yet.

To finish a listing that you previously left incomplete, you should:

1. From the Home Page, click the **Listing Portfolio** icon on the **Listing** tab. A Listview of your listings appears.



Figure 13.10 - The Listing Portfolio icon.

2. In the list of properties, double click the pre-active listing you want to finish. This is also true of any other listing you wish to edit. The Listing Information Sheet appears.
3. Click in the field you want to enter. The cursor starts blinking in that field. Enter the value you desire. Continue editing other fields by pressing **TAB**, or using the mouse to select a different field.
4. When you are finished editing, choose **File>Save** from the menu.

How do I make the listing active?

Once you have added all the required fields, Kinnexus will allow you to make the listing active. Click the **Activate** button on the Next Step Bar at the bottom of the screen.

Status Changes

Because each Kinnexus site can modify the original set of statuses, it is impossible to document all possible status changes. There is a rule that can be followed, however. Status change icons appear on the Next Step Bar whenever you are looking at one of your listings. Click the appropriate icon to change the status.

The instructions for bringing up one of your listings are the same as included in the section above. Click the **Listing Portfolio** in the **Listing** tab to bring up your inventory list. Then double click the listing you want to mark as Sold, Pending, Withdrawn, or whatever other statuses you have. After double clicking the property, the Property Information Form appears. At the bottom of the screen on the Next Step Bar there are buttons for changing the status of the listing. Click once on the appropriate icon.

Icon	Status	Description
	Pre-Active	A Pre-Active listing is one that you are in the process of adding. If you choose to save your listing before the listing is activated, it will receive the status of Pre-Active. Pre-Active listings are not included in searches.
	Active	Active listings are on the market. They can be searched by the entire MLS.
	Hold	Hold is a special designation that a listing is temporarily off the market. If an owner had a death in the family, or some other event where they didn't want to show the house for a few days, you could change the status of the house from Active to Hold. Other agents can still search and find listings that are on Hold, but the Hold Status informs you that it is temporarily unavailable.
	Contingent	Mark a listing Contingent if someone has made an offer on the property, and you have accepted the offer, but the offer contained contingencies such as "Depending on the sale of another property."
	Pending	Pending sales are similar to contingent sales, except in a pending sale, the only thing that you are waiting for is the financing. There are no other encumbrances.
	Sold	Once you have closed on a property you should record the sold information in the database. Use the Sell Listing Wizard to mark a listing sold.
	Expired	When the current date passes the expiration date, your listing is marked as expired. The expiration happens automatically. Once a listing expires, it is moved to your "Lost Listing Portfolio."

Figure 13.11 The original list of statuses. Your administrator may add or remove statuses from this list.

PHOTOS

Photos play an important part of your listings. For many clients, the photo will say much more than numbers and text. It is important, therefore, that your photo is a good representation of the property. To help you capture the essence of the property, Kinnexus allows you to add more than one photo per property. This chapter will show you how to enter a new photo, how to change a photo, and it will give you some basic tips for day-to-day MLS use.

Viewing existing photos

Since you can enter more than one photo for a listing, you are not guaranteed to see all the photos by looking at the listing forms. Here is a method to see all the photos for one of your listings.

1. Start at the Home Page.
2. Click on the **Listing** tab in the Task Bar.



Figure 14.1 - The Listing tab.

3. Click on the **Listing Portfolio** icon in the Task Bar. You are shown a Listview of your properties.



Figure 14.2 - The Listing Portfolio icon.

4. Double click a listing.
5. Click the **Photos** button on the Next Step Bar.



Figure 14.3 - The Photos button.

6. This is the Picture Information dialog box. This dialog shows all of the photos entered for this property. Use the scroll bar or the arrow buttons to view all of the photos entered for the property. You can double click on a photo to see the photo full size.

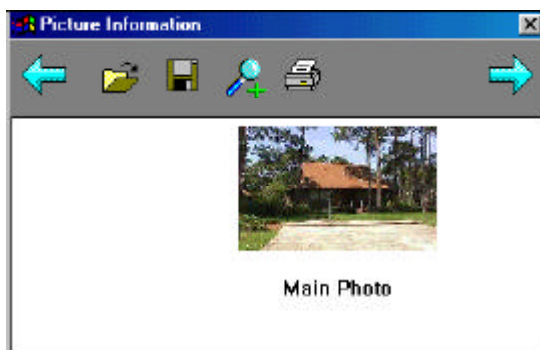


Figure 14.4 - The Picture Information dialog.

Adding a photo

The following instructions will show you how to add one or more photos to a listing. In order to add a photo to Kinnexus, the field must first be stored in a graphic file such as a jpg or bmp, and you must know where the file is stored on your computer.

1. From the Home Page, click the **Listing Portfolio** icon on the **Listing** tab. A Listview of your listings appears.



Figure 14.5 - The Listing Portfolio icon.

2. Double click the listing to which you want to add a photo.
3. Click on the **Photos** button on the Next Step Bar. The **Picture Information** dialog box appears.



Figure 14.6 - The Photos button.

4. Click the **Open** button. A **File Open** dialog box appears.



Figure 14.7 - The Open button.

5. Select your photo file from the floppy disk or your hard drive. Click the **Open** button. Your photo is entered into the Kinnexus database.
6. Your system administrator has designated several types of photos that can be entered into the system. Click the **Photo Title** drop-down menu to see the photo types. The main photo, the one you want to appear in the book, should be designated as the **Main photo**. If your photo does not match one of the preset definitions, there are usually several **Other** designations you can choose.



Figure 14.8 - The Photo Title drop-down menu.

What kind of files does Kinnexus take?

Kinnexus can read almost any graphic file format. Here is a list of the most common file types.

- JPG
- GIF
- BMP
- TIFF
- Kodak Photo CD

If Kinnexus does not recognize the format of your graphic file you will get an error message. If that happens, try to have your files converted to one of the above formats. Scanners and digital cameras almost always give you a choice of file formats.

How many photos can be entered?

You can enter several photos for each listing. Your system administrator can change the maximum number allowed. If you try to add too many photos to a listing, you will receive a message informing you that the maximum number has been reached.

CMAs

Kinnexus includes a simple CMA function in the basic Kinnexus package. The basic CMA functions will allow you to enter a Subject Property, search for comparable properties, and print search results. A CMA add-on module that has enhanced printing capabilities is available from Telescan.

Perform a CMA

There are three parts to a Kinnexus CMA:

1. Enter Subject Property
2. Create CMA search
3. Print CMA search results

Step 1 shows you how to enter a Subject Property. You can enter several Subject Properties for convenience. Subject Properties are not searchable, and appear only in your CMA Portfolio. In step 2 Kinnexus helps you create a search based on your subject property. It is a special relevancy search designed to help find the best matches. Kinnexus automatically fills in much of the criteria for you. In the last step, you will weed through the search results and choose the properties you want to print using either a standard form, or a custom form you have created.

Step 1: Enter a Subject Property

The first step to run a CMA is to enter a Subject Property. This Subject Property will be a basis for entering search criteria in step 2. Each CMA search must have a Subject Property. Because of this fact, you may want to keep a blank CMA Subject Property around for running a CMA without a Subject Property.

Here are the steps to create a CMA Subject Property:

1. Return to the Home Page by clicking the **Home** button.



Figure 15.1 - The Home button.

2. Click the **Listing** tab at the left of the screen.



Figure 15.2 - The Listing tab.

3. Click the Create CMA icon. The CMA Listing Wizard appears.



Figure 15.3 - The Create CMA icon.

4. Enter the desired information in the wizard. You can skip any information you think is irrelevant. Click the **Next** button to move to the next page of the wizard.

Figure 15.4 - The CMA Listing Wizard.

5. When you have entered as much information in the wizard as possible, click the **Go to Form** button. The Listing Data Entry Form appears.



Figure 15.5 - The Go to Form button.

6. This is similar to adding a listing. Enter as much information as you can about the property. You can skip any information you think is irrelevant or unimportant, but you will get more accurate results if you enter as much information as possible.
7. Save the subject property by choosing **File>Save** from the menu.

Step 2: Create the CMA Search

Once you have created a CMA Subject Property you can create a CMA search. Kinnexus will use the information you entered for the Subject Property to create default search criteria.

CMA searches use a more powerful way to search called Relevancy Searching. In a Relevancy Search, you assign how important each search item is to the overall search. The price of a listing, for instance, might be more important than if the yard is fenced. The importance levels are low, medium, high, very high, and required. Each importance level has an associated point value. When searching, Kinnexus compares each listing with the search criteria, and adds up the point values for all the matching criteria. The listings with the highest point totals are considered the best matches.

Here are the steps to create a CMA search:

1. You should be looking at a CMA Subject Property. If you are not, follow the steps outlined in *Enter a Subject Property* on page 83-4.
2. Click the CMA Search Wizard button on the Next Step Bar. A CMA Search Wizard appears. You may notice that this wizard is a bit different because some of the search values have already been entered. These values are based on your Subject Property and can be edited at will.



Figure 15.6 - The CMA Search Wizard button.

3. Enter or edit any extra criteria you desire to retrieve more accurate results.
4. Set the importance of the criteria items. Remember that the more important a criteria item is, the more weight it will carry during the search process. Click the relevancy number to rotate through the relevancy values.

- L – Low
- M – Medium
- H – High
- V – Very High
- R – Required: A listing will not match unless it matches this search criteria

5. ~~Click the~~ Go button at the top of the wizard. You are taken to a list of search results.

How do I get back to the CMA search criteria?

After running a CMA search you may find that you have too many search results to work with, or maybe you have none. It is possible to get back to the CMA Search Wizard to edit your search. Click the **Criteria Wizard** button to edit a search, then follow the previous steps to edit the search.



Figure 15.7 - The Criteria Wizard button.

Step 3 – Print comparable properties

After running a search you are able to look through the search results and hand select the properties that you want to print as part of your CMA. After selecting the items you want, you can print them using a standard system form, or use one of your own custom forms. If you don't like the selection of reports available you can learn how to create your own reports in the *Kinnexus for Advanced Users* manual.

Designate Comparables

1. Click a listing that you would like to use as a comparable property.
2. Click the **Highlighter Selection** button on the toolbar. Select the yellow highlighter from the list. The selected listing turns yellow.
3. Repeat this process to highlight all comparable properties.

Print Comparables

1. Click the **Print** button on the toolbar or select **File>Print** from the menu. The **Print** dialog appears.

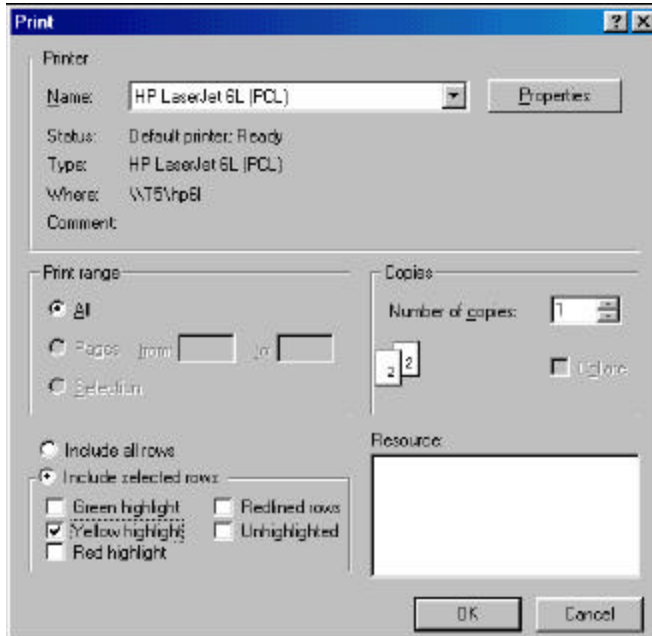


Figure 15.8 - The Print dialog.

2. Click in the circle next to **Include selected rows**. A dot should appear next to it.
3. Put a check mark next to **Yellow highlight**. Remove all other checks in the section.
4. From the **Resource** field, select an appropriate report for printing CMAs. Most boards have created a **CMA 3 Up** report, which prints three properties on a page.
5. Click the **OK** button. All search results you highlighted yellow will be printed using the designated form.

Kinnexus Add-On CMA

The basic Kinnexus CMA helps you find comparable properties based on a subject property and allows you to print them using a standard or custom form. Added functionality, such as adding charts and graphs, are included in the CMA add-on module. Contact your MLS office for more information regarding the add-on CMA module.

Reprinting a CMA

CMA searches are saved with the CMA subject property. Until you delete a subject property you can print the CMA you created for the subject property. These instructions will help you return to a CMA that you have already created to print another copy of the CMA. These instructions assume that you have already created a CMA.

1. Click the **Listing** tab at the left of the screen.
2. Click **CMA Listing Portfolio** icon on the **Listing** tray. A list of previously created CMAs appear.



Figure 15.9 - The CMA Listing Portfolio icon.

3. Double click the name of the CMA you would like to reprint. You are taken to a listing detail form.
4. Click the **CMA Search** button on the Next Step Bar. You are taken to a list of search results.
5. The items that you originally highlighted should still be highlighted. If not, you will need to select the comparable properties to print.
6. To print the CMA, click the **Print** button on the toolbar, or choose **File>Print** from the menu.

Deleting a subject property

After you are done with a Subject Property you can delete it at any time. It is suggested that you delete all Subject Properties that you are not using so that you don't clutter your CMA portfolio and increase clutter on the server. Below are instructions for removing a Subject Property. These instructions assume that you have a Subject Property that you want to delete.

1. Click the **Listing** tab at the left of the screen.
2. Click the **CMA Listing Portfolio** icon on the **Listing** tab. A list of previously created CMAs appear.
3. Click the name of the CMA you would like to delete. Only click once on the line. The entire line should become selected.
4. Click the **Delete** button on the **Next Step Bar**. The selected item is deleted from the list.



Figure 15.10 - The Delete button.

LISTING SCENARIOS

Here are some common scenarios that you might encounter. Although there are instructions elsewhere in the chapter that would show you how to solve these problems, these scenarios may be more helpful because they present real world problems.

Scenario 1: Updating a price

Suppose the owner of the listing MLS# 123456 has decided to lower the asking price from \$150,000 to \$145,000. These instructions will walk you through the necessary steps to record the price change in the MLS.

1. Start at the Home Page. If you are not there already, click the **Home** button at the top-right of the page.



Figure 16.1 - The Home button.

2. Click the **Listing** tab.



Figure 16.2 - The Listing tab.

3. Click the **Listing Portfolio** icon. A listview of all your listings is exposed.
4. Look for **MLS #123456** among your listings. Double click it. The Listing Form appears. (If you don't have a column for MLS#, see page 58 for information on adding columns.)
5. Locate the **Price** field on the Listing Form. Click the mouse while pointing directly the figure in the **Price** field. Your cursor should start blinking in the **Price** field.



Figure 16.3 - The Price field.

6. Erase all of the numbers in the **Price** field using the **BACKSPACE** and **DELETE** keys.
7. Type: <145000> in the **Price** field. You don't need to type in the dollar sign or the comma. Kinnexus will automatically insert those symbols.



Figure 16.4 - The Price field.

8. Select **File>Save** from the menu. This saves the change to the Kinnexus database.

Scenario 2: Update a photo

It is now spring and you want to update the photo of MLS listing #123456 from a winter photo to a recent spring photo. These are the steps you would follow to add a new photo, and designate it as the summary photo.

1. ~~Start at the Home Page. If you are not there already, click the Home~~ button at the top-right corner of the screen.
2. Click the **Listing** tab at the left of the screen.
3. Click the **Listing Portfolio** icon. A Listview of all your listings is exposed.
4. Look for **MLS #123456** among your listings. Double click it. The Listing Form appears. (If you don't have a column for MLS#, see page 66 for information on adding columns.)
5. Click on the **Property Photobook** icon on the Next Step Bar. The **Picture Information** box appears.
6. Click on the **Open** button. It looks like an open file folder. A **File Open** dialog box appears.
7. Select the **New Photo** file. If it is on the floppy disk, you may have to type: <A:\> in the filename box, so you can see the various files that are on the floppy disk. Once you have highlighted the proper file, click the **Open** button. The file is read into the database. The photo is entered into the database with the caption, **Unassigned**.
8. Only one photo can have the designation **Main Photo**. If another photo is currently designated as the **Main Photo**, double click the photo. You have to change it to another designation before the new photo can be designated as the **Main Photo**. Once the photo appears, click the **Photo Title** drop-down arrow. Click **Unassigned** from the drop-down menu. Press the **ENTER** key on the keyboard.

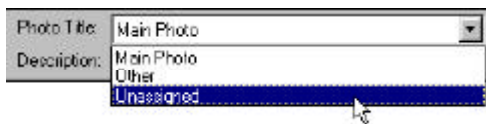


Figure 16.5 - The Photo Title drop-down menu.

8. Double click the new photo you just entered into Kinnexus. The photo appears full size. Click the **Photo Title** drop-down arrow. A list of possible titles appears. Select **Main Photo** from the list. Press the **ENTER** key on the keyboard.
9. To close the **Photo Information** dialog box, click the small 'x' button in the top right corner of the **Photo Information** dialog box.

SECTION 6

INFORMATION EXCHANGE

It is extremely easy for Kinnexus to share information with different applications. This is helpful for Realtors wanting to take advantage of Internet browsers and email, as well as other real estate applications. This section of the manual will demonstrate several ways to get information from Kinnexus to other programs. Specifically, you will learn how to export a listing or group of listings to Top Producer or a text file. You will also learn how to send and receive Internet Email and access Internet web pages from within Kinnexus.

This section is organized in the following way:

- Chapter 17: Exporting
- Chapter 18: Web Browser
- Chapter 19: Basic Email
- Chapter 20: Download Data

EXPORTING

CHAPTER

17

It is extremely easy to get your data out of Kinnexus and into another program such as Microsoft Excel or Top Producer. This section will not go through every aspect of exporting data, but will outline the most common exporting features. Power users will find added exporting information in the *Kinnexus for Advanced Users* manual.

Exporting to Top Producer

Kinnexus is compatible with Top Producer. You can move your listings and search results from Kinnexus into your Top Producer program. This is helpful if you are particularly apt with Top Producer.

Some legacy systems allow Top Producer to dial directly into their servers. This is not an option with Kinnexus at the present time. Instead, Kinnexus users download a file that Top Producer can read. This process is called “exporting.”

There are two basic steps in exporting listings. First, you have to tell Kinnexus which listings you would like to export. This is most commonly done with a search. The second step is to designate the format in which to save the listings.

For this example you need to be looking at a list of search results. If you are not familiar with how to run a search, see page 36.

What to do

Listings can be selected from any portfolio -- the Listing Portfolio, Lost Listing Portfolio, or the Sold Listing Portfolio. You can also export listings from lists of search results. This example demonstrates how to export listings from a list of search results. Although it is possible to export only a portion of the list, this example will export the entire list of search results.

1. Assuming you are looking at a list of search results, choose **File>Export** from the menu. The **Export Format Dialog** appears.
2. Click **Top Producer tag format**.
3. Click the **Export** button. A **Save As** dialog box appears.
4. Use the **Save in:** drop-down menu to designate where you want the file saved. If you are unfamiliar with how to designate a different directory, simply click the **Save** button and the new Top Producer file will be saved in the Kinnexus Directory.

In order to use the Top Producer file created by Kinnexus, you will need the Kinnexus version of Top Connector, which can be purchased from Top Producer, Inc. The instructions included with Top Connector explain how to read the file Kinnexus created.

Exporting to other formats is just as easy. Simply repeat steps 1-4 above, choosing a different format on step 2.

THE WEB BROWSER

Kinnexus has a built-in Internet browser that allows you to view and search web pages inside the Kinnexus program. The web browser functionality only works if your MLS is connected to the Internet. Most MLS boards are -- but if you are not sure, check with your board.

In this section you will learn to:

- Check preexisting links to web pages using the To Do List.
- Browse the www.kinnexus.com web page

Your system administrator has control over the pages that you are able to view inside Kinnexus. They may give you free range on the Internet, or they may limit access to only a few pages. Not all of the web functionality is discussed in this book. The *Kinnexus for Advanced Users* manual has a more complete list of tools and suggestions for using the web tools in Kinnexus.

Check web links

Web links are items in the To Do List. Clicking a Web Link loads a designated web page. The system administrator can designate Web Links for the entire board. The Kinnexus for Advanced Users manual explains how to create your own custom links. These instructions will teach you how to use a link that has already been created. These instructions assume that you are at the Home Page. If you are not at the Home Page, click the **Home** button at the top right of the screen.

1. Locate the Web Links in the To Do List. All web links start with the word “View.”
2. Click one of the Web Links. You are taken to the specified web page.

After using a To Do Web Link, a check mark appears next to the link indicating that you have performed that feature. The check mark disappears the next time you log in.

Go to a specific web page

Depending on the browsing restrictions set up by your MLS, you can use Kinnexus to browse any page on the Internet, including those not associated with one of your links. This chapter explains the basics of the Internet browser and describes how to visit the Kinnexus Home Page.

These instructions assume that you are looking at the Home Page. If you are not looking at the Home Page, click the **Home** button on the toolbar.

1. Click the **Internet** tab at the left of the screen.
2. Click the **Home Page** icon. The main view changes to show you your Internet home page.

Parts of the browser

The Kinnexus web browser works like any other web browser. Here are the different parts of the Kinnexus web browser:



Figure 18.1 - Kinnexus web browser buttons.

1. Previous page button
2. Next page button
3. Stop
4. Refresh
5. Internet Home Page
6. Create Kinnexus Internet Link
7. Current Web Page (URL)

Go to another web page

If you want to go to a particular page all you need to do is enter the URL.

1. Click in the URL field. This field is found at the top of the screen to the right of the **Delete** button.
2. Erase the URL that is there by pressing the **DELETE** or **BACKSPACE** keys. Erase everything on the line.
3. Type <www.kinnexus.com>.
4. Press the **ENTER** key. You are taken to the Kinnexus web site.

Important note

Your system administrator has control over how much of the Internet you have access to. Some boards may restrict Internet access to just a few sites. If there is a site that you would like to access, but are unable to, talk with your system administrator.

BASIC EMAIL

Email has fast become an integral part of many Realtors' daily routines. Email is a fast, convenient, and environmentally friendly way to stay in touch with co-workers and clients. Since Kinnexus uses Internet email (Pop 3 compliant), you can use it to send email to people anywhere around the world.

Here are a few of the ways you can use Kinnexus email:

1. Read your Internet email.
2. Send email to people/clients around the world.
3. Send email to other agents. Every agent has his or her own Kinnexus email address.
4. Easily attach listings, lists, or files to your email messages.
5. Post and read messages to Kinnexus News Groups.

Read new email

This chapter will show you some basics of using email. Such skills include how to determine if you have received new mail, and how to send messages.

How do I know I have new mail?

When you have new email, you will see an entry in the To Do List on the Home Page informing you the number of new messages. If you have two new messages, the To Do List will contain an entry that says: **2 new email messages**.

Follow these instructions to read your email:

1. If you are not at the Home Page, click the **Home** button at the top-right of the screen.
2. Click the To Do item that informs you of the number of new mail messages. Click it even if it says zero. You are taken to your email Inbox.
3. New email messages appear in a color other than black.
4. Double click the message you would like to read. The message text appears. If the text is longer than can fit in the window, a scroll bar appears on the right edge of the screen that can be used to read the rest of the message text.

At this point there are several things that you can do with the email message. Notice there are several buttons at the top of the email message. These represent the different methods you can use to respond or print the message. These options will be familiar to those who have used an Internet mail program previously.

Send email

To send an email message, follow these instructions:

1. Click the **Create Message** icon on the **Mail** tab. A blank email message appears.



Figure 19.1 - The Create Message icon.

2. Click in the **To:** field. Type the email address of the person you want to receive the message. (You can also click the word **To:** to bring up your address book.)



Figure 19.2 - The Price field containing a maximum value.

3. Press the **TAB** key on the keyboard to go to the **Subject** field. Enter a brief subject about the email message.
4. After entering the subject, press **TAB** and type your email message. When you are finished with the message, click the **Send** button at the top of the email window.

Read newsgroups

Newsgroups are special email messages that are used to communicate with a large group. Posting to a newsgroup is like putting a notice on a bulletin board. There can be several different groups where you can post a message. The idea is to keep a common theme to the messages in each newsgroup. There could be, for instance, a newsgroup for any new tips or tricks people have discovered that helps them use Kinnexus. If you discovered a new trick you would post a message to the group. You could also peruse the messages in that newsgroup every once in a while to see what you can learn. Another newsgroup could be for open house announcements, or for any general announcements you want to make to the membership.

What newsgroups are available?

Your local board has created the set of newsgroups that are available. Every board will have different newsgroups depending on the needs of their members. You can only join the newsgroups for which you have sufficient access. The MLS administrator is ultimately responsible for assigning access. To see which newsgroups you can access, follow these instructions.

1. These instructions assume that you are at the Home Page.
2. Click the **Mail** tab at the left of the screen.
3. Newsgroups are represented on the **Mail** tab as icons resembling newspapers. Click one of the newsgroups icons.
4. You are now looking at a list of all the messages that have been posted to this newsgroup. If the list is empty, it is because there haven't been any messages posted to this newsgroup yet, or it could be that you don't have any columns selected.
5. When someone replies to a message, Kinnexus indents the reply in an outline fashion. Clicking on a plus (+) expands the outline so you can see the replies to a message. Clicking on a minus sign (-) collapses the tree.
6. Double click one of the messages to read its contents.
7. Standard email functions such as **Reply**, **Reply all**, **Forward**, and **Print** are available.
8. To close a newsgroup message, click the small 'x' at the top right of the message window.

Can I read Internet newsgroups?

Although they function much the same way, Kinnexus newsgroups are not connected to Internet newsgroups. Likewise, you cannot use an Internet news reader to browse Kinnexus news. Information posted to Kinnexus newsgroups is available only to other Kinnexus users in your MLS.

Post a newsgroup message

So far you have learned a little about newsgroups and how to read them. The following instructions show you how to post your own message to an existing newsgroup:

1. This example starts from the Home Page. If you are not at the Home Page, click the **Home** button at the top-right corner of the screen.
2. Click the **Mail** tab at the left of the screen.
3. Double click the newsgroup to which you want to post a message.
4. Click the **New Message** button on the Next Step Bar. A new mail message is created and pre-addressed to the name of the current newsgroup.
5. Click in the **Subject** field and type a subject for your new message.
6. Press the **TAB** key to move from the **Subject** field to the text body.
7. Type your desired message. There are formatting tools on the toolbar in case you want to change the font characteristics.
8. When you are finished typing your message, click the **Send** button. Your message is placed in the Mailbox. The mail message closes automatically for you, and you are returned to the list of posted messages. You should be able to find your message in the list.

DOWNLOAD THE DATA

One of the many excellent features of Kinnexus is the ability to download part or all of the database to your own computer. This allows you to take the database with you wherever you go. With a downloaded database you can access the information on your computer without a phone connection to the Kinnexus server.

Another bonus of Kinnexus is that you can make changes to listings either online or offline. After making changes to one, the other database is updated automatically the next time the databases are connected. Kinnexus is one of the few systems that allow you to change the local or server database. Because Kinnexus not only copies data from the server, but also updates the server with changes made offline, we like to use the term “Data Replication” rather than “Downloading.” Downloading is just a one-way copy. Kinnexus copies information two ways.

How do I replicate data?

The process of replicating data has been greatly simplified for your convenience. This chapter explains the concept of a “Replication Profile,” and shows you how to join a profile.

Your access level controls your ability to replicate data. You will not be able to download data unless your administrator has given you permission.

What is a Replication Profile?

You tell Kinnexus that you want to download data by joining a Replication Profile. A Replication Profile is a preset definition or groups or areas of listings. Kinnexus keeps the properties defined in the profile up to date on your computer. A profile might look something like this:

1. Download all residential properties in areas 10-30. Download photos for each of the listings.
2. Download areas 31-36, but without photos.
3. Download my own inventory.

Each time you connect to the server computer, Kinnexus checks your computer to see if it is up-to-date, and it is updated with the most current information.

You can only join one Replication Profile. Advanced users who have been granted proper permission can create their own Replication Profiles if they desire. The process of creating your own Replication Profile is outlined in the *Kinnexus for Advanced Users* manual.

How do I change Replication Profiles?

You initially joined a Replication Profile the first time you logged on to Kinnexus. You can change Replication Profiles at any time. Here are instructions to help you:

1. Choose **Tools>Replication Files** from the menu. A list of profiles appears.
2. Click the Replication Profile you desire.

3. Click the **OK** button. After selecting a new Replication Profile, Kinnexus will download the initial set of information to your computer. This process is called a “cold start.” This process could take just a few minutes or a couple hours, depending on the amount of information you choose to download.

A day-to-day replication example

You can update your local database as often as you want -- once a week or several times a day. It is important to keep your replication up to date. Connecting to the server frequently means there is less to download, and therefore the download takes place more quickly. Also, frequent updates keep your database accurate.

Manual Update

During an update, any information you have changed offline is copied to the server. To update the server at any time, simply select **File>Update Server** from the menu.

SECTION 7

APPENDICES

This section is organized in the following way:

- Appendix A: Installation
- Appendix B: Configuration
- Appendix C: Logon

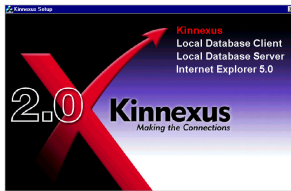
APPENDIX A: INSTALLATION OPTIONS AND FEATURES

Although only the standard Kinnexus installation option is covered in Chapter 1, there are four installation options available from the Kinnexus Setup screen. This appendix describes all four installation options, tells you when and how to install them, and identifies customizable features within each installation option.

Setup Screen

When you begin installing Kinnexus, you will come across the Setup screen containing four installation options:

Kinnexus
Local Database Client
Local Database Server
Internet Explorer 5.0



Kinnexus Installation

Click the **Kinnexus** installation option to install the Kinnexus database and software on your computer. This option will install only the necessary files for Kinnexus to be used on a server. If you wish to replicate data with Kinnexus you will need to install the Local Database Client or Local Database Server software after the installation of Kinnexus.

During Kinnexus installation there are two places where you can customize Kinnexus options and features. Below are instructions on how to customize these options and features. See Chapter 1 for information about where these processes fall in the installation processes.

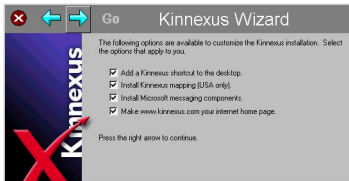
Directory

During the installation process you will come to the Directory screen. You can choose to install to the default directory, or select a different directory.

- To accept the default directory, simply click the **Next** button to continue installation.
- To select a different directory:
 1. Click the **Browse** button. A Browse dialog will appear.
 2. Select the desired directory and click the **OK** button. The Browse dialog will close.
 3. Click the **Next** button on the Directory Screen to continue the installation process.

Features

During the installation process you will come to the Features screen. On the Features screen, a check mark next to a feature means that the feature is selected. All features are selected by default. To deselect a feature, click once in the check box. The check mark will be removed.



The Features screen contains four check boxes:

Add a Kinnexus shortcut to the desktop

Select this feature to create a Kinnexus icon on your desktop. To open Kinnexus you can simply double-click the icon.

Install Kinnexus mapping (USA only)

Select this feature if you wish to locate properties on a map.

Install Microsoft messaging components

Select this feature if you wish to have email function in Kinnexus. If Microsoft messaging components are already installed on your computer, this feature will be grayed out.

Make www.kinnexus.com your internet home page

Select this feature if you want your Internet browser to load the Kinnexus home page every time it is opened.

Note: For a complete set of Kinnexus installation instructions, see Chapter 1.

Local Database Client Installation

Click the Local Database Client Installation option on the Setup screen if you work from a shared database. Installing the Local Database Client will allow you to replicate data. To install Local Database Client, follow the instructions below.

1. Click **Local Database Client** on the Setup screen.
2. Read the licensing agreement. If you agree, click the **Yes** button at the bottom of agreement. The Microsoft Data Access Setup screen will appear. If you do not click the **Yes** button, you will not be able to install Local Database Client.
3. Click the **Continue** button. Setup will search for installed components.
4. Click the large icon next to **Complete Install all Data Access Components**. (Icon resembles a globe in front of a computer.)
5. Local Database Client will install. Click the **OK** button when it appears.

Local Database Server Installation

Click the Local Database Server option on the Setup screen if you do not share a local database, and you want to be able to download replication files. If you are on a laptop you will need to install Local Database Server. If you do not travel, and are on a network, only one person on your network needs to install Local Database Server.

Internet Explorer 5.0 Installation

Click the Internet Explorer 5.0 option on the Setup screen if you do not have Internet Explorer 3.0 or greater, and Internet Explorer 5.0 will be installed on your computer. If you do not have Internet Explorer 3.0 or greater installed on your computer, some Kinnexus components will not function properly.

APPENDIX B: CONFIGURATION OPTIONS AND FEATURES

APPENDIX

B

Chapter 2 guided you through a standard configuration with very little explanation of the various configuration options. This appendix contains descriptions of several configuration options and shows you when and how to use them.

Welcome to Kinnexus screen

During configuration, a Welcome to Kinnexus screen will appear. On the Welcome to Kinnexus screen are several options you can choose from.



Dial into server check box

Select the **Dial into server** check box on the Welcome to Kinnexus screen if you use a modem to dial into Kinnexus. If you select this check box, you won't have to run dial-up networking when you open the program. Kinnexus will dial up the network for you..

Note: Don't select this option if you share a computer with several other people, or if you will be regularly using Kinnexus as a part of a larger Internet session.

RAS Connection and Phone Number fields

In the RAS Connection drop-down field you select a method for accessing Kinnexus.

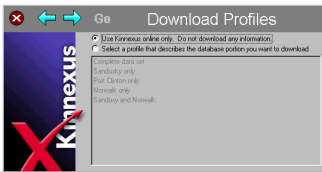
- If you are accessing Kinnexus through the Board, click the **RAS Connection** drop-down arrow and select **Kinnexus** from the menu. You will need to type in the correct dial up phone number in the **Phone Number** field. If you do not know the correct phone number, consult your Board Form.
- If you are accessing Kinnexus via the Internet, click the **RAS Connection** drop-down menu and select the desired ISP from the menu. The correct phone number will display in the **Phone Number** field.

Add and Properties buttons

If you wish to add an ISP or change your dial up networking properties, use the **Add** and **Properties** buttons. Clicking the **Add** or **Properties** buttons brings up standard Microsoft Windows Add and Properties windows. See your Microsoft Windows documentation for information on how to add an ISP or change dial-up networking properties.

Download Profiles Screen

During configuration you will come to the Download Profiles screen. At the Download Profiles screen, you need to select one of two radio buttons: **Use Kinnexus online only. Do not download any information** OR **Select a profile that describes the database portion you want to download.**



Use online only radio button

Select the **Use online only** option if you will only be using Kinnexus online. If you select this option you will not be able to work in Kinnexus while you are offline. Follow the instructions below to configure Kinnexus to run online only.

1. Select the **Use Kinnexus online only. Do not download any information** radio button.
2. Click the **Next** button. The Online Database screen will appear.
3. On the Online Database screen will be several radio buttons. Select the radio button that describes the kind of local database Kinnexus will use on your computer. If you do not know which option best describes your online database, select the **None of the above conditions apply to me** radio button.

Local Database radio button options:

I travel with this computer and connect from different locations like home and work.

Select this item if you use a laptop.

There is an office shared network with either the main server or an office server. Only select this option if your office administrator instructs you to.

Select this option if you connect to the server through Local Database Server on another office computer. If you do not have Local Database Client installed, you will need to install it before you can connect to the Local Database Server. Don't select this option unless your office administrator tells you to.

I am located on a local network with either the main server or an office server.

This option is used primarily by Board Administrative staff. Don't select this option unless your office administrator tells you to.

None of the above applies to me.

If none of the options on the screen apply to you, or you do not know which option to choose, select this option.

4. Click the **Next** button to continue with the configuration process.

Select a profile

Select the **Select a profile that describes the database portion you want to download** option if you will be using Kinnexus offline. If you select this option you will be able to download parts of the Kinnexus database to work in while you are offline. Follow the instructions below to configure Kinnexus to download parts of the database.

1. Select the **Select a profile that describes the database section you want to download** radio button.
2. Click the database section you wish to download from the window below.
3. Click the **Next** button. The Local Database screen will appear.
4. On the Local Database screen will be several radio buttons. Select the radio button that describes the kind of local database Kinnexus will use on your computer. If you do not know which option best describes your local database, select the **None of the above conditions apply to me** radio button.

Local Database radio button options:

I travel with this computer and connect from different locations like home and work.

Select this item if you use a laptop.

There is an office shared network with either the main server or an office server. Only select this option if your office administrator instructs you to.

Select this option if you connect to the server through Local Database Server on another office computer. If you do not have Local Database Client installed, you will need to install it before you can connect to the Local Database Server. Don't select this option unless your office administrator tells you to.

None of the above conditions applies to me.

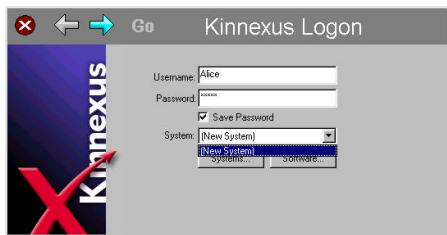
If none of the options on the screen apply to you, or you do not know which option to choose, select this option.

5. Click the **Next** button to continue with the configuration process.

APPENDIX C: LOGON OPTIONS AND FEATURES

Chapter 3 guided you through a standard logon. When logging on to Kinnexus, however, you might want to select different system options, or view certain information. The following descriptions and instructions identify these optional logon features and show you how to use them.

Logon Screen



System Selection

If you use more than one system, you can select which system you want to work on by using the System drop-down menu. The following instructions show you how to select a system from the System drop-down menu.

1. Click the System drop-down menu. A list of systems that have been configured on your computer before will display.
2. Click the system you wish to work on.

Systems Button

If you wish to manage or view any of the systems that have been configured on your computer, click the Systems button. This will open the Systems dialog. Click the Close button when you are through managing and/or viewing your systems.

Software Button

To view current versions of Kinnexus Software, click the Software button. The Software dialog will open. Click the Close button when you are through viewing the software versions.

REFERENCE SECTION

GLOSSARY

Download: The transfer of data from the Kinnexus server to your computer.

Contiguous: Items in a row or next to each other.

Field: One value from the database such as price, area, or street name.

Form: A printout page. The system administrator has created several default forms that you can use. The words Form, Report, and Print out are used interchangeably.

Listview: A column report, one property per line. Listviews in Kinnexus can also change to be a list of forms.

Home Page: The page you see right after logging in. From the Home Page you can start almost any process.

You can always return to the Home Page by clicking the Home button.

Home Button: Returns you to the Home Page, no matter where you are in the program.

HTTP: Internet acronym for "Hyper Text Transfer Protocol." This is the format of web pages.

Menu Bar: Contains the File, Edit, View, etc., menus across the top of the screen.

Next Step Bar: Commands on the bar change according to your location in the program. Only buttons applicable to where you are in the program appear on the bar. Located on the bottom of the screen.

Offline: Means your computer is only retrieving information from your computer, and not the Kinnexus server.

Online: Means your computer is connected to the Kinnexus server, and is retrieving information mainly from the server and not your computer.

Password: Used in conjunction with your correct username, your password gives you access to the database.

Your username and password are not case sensitive. Your system administrator initially designates your password, but you can change it any time.

Portfolio: A collection of something -- a collection of your inventory, a collection of your searches, a collection of mail messages, etc. Clicking on a Portfolio brings up a Listview that shows you the items in the folder.

Replication Profile: The definition of what will be downloaded to your computer. You can join only one profile at a time. The process of changing profiles is called a cold start.

System Administrator: The computer person designated by your board or MLS to maintain Kinnexus.

Tabs: Contain different icons that display when you click on the name of the tab. Some of the tabs are Search, Listing, Internet, and Mail. Located on the left side of the Home Page.

Table: A collection of similar fields in the Kinnexus database. Residential and Common are two examples of different tables in Kinnexus.

Upload: The process of moving data from your computer to the server. Uploading happens automatically each time you connect to the server.

URL: Internet acronym for Uniform Resource Locator. In other words, a web page address.

Username: The name that you use to log in to Kinnexus. Your system administrator designates your username.

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