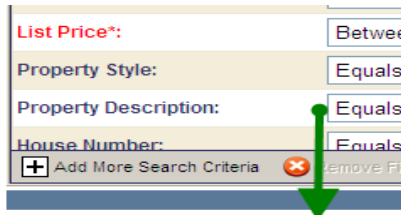


Listing Search Templates

The Search Manager has a multitude of templates to accommodate the various types of property searches and the number of fields available for entering criteria. Listing searches are likely your biggest and most used search area.

▶ ↓ To access Template Manager from a listings search:

1. From the main menu, click **Search** and the Search Criteria page opens.
2. Click the **Search type** drop-down list and select the type of search you are working with, for example, “Open House”.
3. Click the **Search template** drop-down list and select a template.
The default template available is Res Simple Search, which you cannot modify. You must use the Template Manager function to make a copy and rename it, before changing the search criteria fields.
4. Select **Template Manager** from the Action menu, then, click the arrow button.

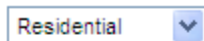


A screenshot of a search criteria form. It includes fields for 'List Price*' (Between), 'Property Style' (Equals), 'Property Description' (Equals), and 'House Number' (Equals). At the bottom, there are buttons for '+ Add More Search Criteria' and 'Remove Field'. A green arrow points to the 'Remove Field' button.

Action: **Template Manager** [dropdown] [arrow]

The search types and templates become available.

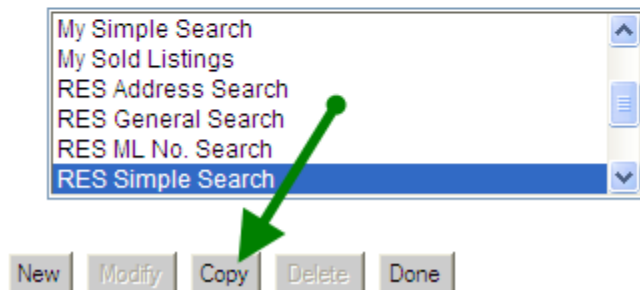
Select the search type



A dropdown menu showing 'Residential' as the selected search type.

After selecting the search type, choose an available template:

Available Search Templates



A screenshot showing a list of available search templates: 'My Simple Search', 'My Sold Listings', 'RES Address Search', 'RES General Search', 'RES ML No. Search', and 'RES Simple Search'. The 'RES Simple Search' template is highlighted in blue. A green arrow points from this template to the 'Copy' button in the action bar below the list. The action bar also includes 'New', 'Modify', 'Delete', and 'Done' buttons.

5. Highlight a template in the list, then click: **Copy** — lets you copy and edit any type of template. **Modify** — lets you edit a Personal template. **Delete** — lets you permanently delete a selected Personal template.

Listing Search Templates

Template Name: My New Tax Template

Select the access level for this template:
 Personal Office Board

Select the fields you want to have in your criteria. Selected fields will appear in the Tax Manager in the same order they appear in the selected fields box found below. Required fields appear in red. Click Finish to save the template.

Available items	Selected items
Accum Units Land 1	Current Recording Date
Accum Units Land 2	Owner Name - Grantor Name
Accum Units Land 3	Owner Zip Code
Accum Units Land 4	Parcel
Actual Year Built	Prev Owner Name - Grantor
Adjusted Square Feet	Property Street Name
Amount of Mortgage	Property Street Number
Baths	Section
Bedrooms	Subdivision
Book	Subdivision Code
City Tax Amount	Tax ID
Current Owner Name	Township Range

1. Enter a **Template Name**.
2. Select the access level option for this template: **Personal, Office, Board** etc.
Note: Depending on your access privileges, you may only be able to create Personal templates.
3. Select the field(s) that you want to appear in the search template from the **Available items** list and move them to the **Selected items** list by clicking the right arrow [➤] button.
 - to select multiple fields, hold down the **CTRL** or **SHIFT** key while clicking.
4. To remove a search field, select the unwanted field from the **Selected items** list and click the left arrow [➤] button.
5. Change the position of the **Selected items** by highlighting a field (one at a time) and clicking the up [▲] or down [▼] arrows. The order of the selected fields determines the order in which they will be displayed on the Search Criteria page.
6. When you are satisfied with the list of selected fields, click **Finish**.
A message box appears telling you that your new template has been saved.
7. Click **OK**.
8. The new search template name appears in the list of available templates.
9. Click **Done**.