Fusion Advanced
Course Handout
by the Houston Association of Realtors®

3 Hours MCE Credit
Course #: 03-00-024-24059

Contents

This course will cover how to create custom searches and custom results grids, use advanced map features and create a CMA with the CMA wizard.

- Custom Searches (Create "Extra Features" search to match the Tempo "And, Or, Not" fields; how to save custom searches as default)
- Search by Map (3 different drawing shapes and their functions; multiple shapes; toolbar items such as location finder & overlays; Filter by map in results)
- Hotsheet and Custom Hotsheet Reports (must create custom search first)
- Customize Results (Sort/Rearrange Default Grid for search results and Contacts; create and set new report defaults; Gallery View; Custom Grids)
- Driving Directions (rearrange route; add/remove additional locations; how to change route type)
- Quick CMA, Stats Pro and CMA Wizard Overview

Custom Searches

To create a custom or saved search, begin by performing a standard Quick Search.

The search tab contains the criteria, results and details screens used to conduct searches.

1. <u>Searches Bar</u>: displays your open searches
2. <u>Searches Task Bar</u>: enables you to switch from criteria to results to details screens, displays search matches and enables you to perform other search-related tasks.

Multiple Searches Feature

While working on one search, you can begin another or several others and have them all open and accessible at once. The title of each search and the number of listings it returned appear in the Searches Bar. You can switch from search to search by clicking the search title. You can also move from one module of Fusion to another (i.e. click the Home tab, the Contacts tab, etc.) and your searches will remain open and accessible by simply clicking the Search tab to return to that module.

To begin a new search, hover your mouse on the Search tab, then click to select the preferred property class (Single-Family, Townhouse/Condo, etc.). Clicking the 🔲 icon will open a Single-Family search.

Searches Task Bar

Icons in the Searches Task Bar enable you to save the current search criteria, enable the search by map. Once criteria is entered, click Results to view the resulting property information.

There is no "search" button in Fusion. Results are automatically filtered and the total number displayed as you enter your criteria. The count indicator shows the total number of results in red letters until the total falls below the 500 property result maximum.

Entering Search Criteria

To create and save new searches, enter your criteria using the Quick Search page. Searches can be saved for your own benefit or be saved and attached to a client to automatically send listings via email.

To add search fields:

1. Click the Add Fields tab at the bottom left of the page to open the field selector.
2. Select a field to add to the search criteria page from the drop-up menu.

3. Click the Add Field button.

Suggested fields to be added:

Style Desc	Room Desc	Bedroom Desc
Lot Desc	Interior Features	Waterfront Features
Exterior Const	Exterior Desc	Restrictions
Disclosures	Property Type	Financing Available
Green/Energy Certifications		Energy Features

Remove a field from the search criteria page:

1. Move your cursor over the field so that the Options link becomes visible.
2. Click the Options link to open the options panel.
3. Click Remove This Field

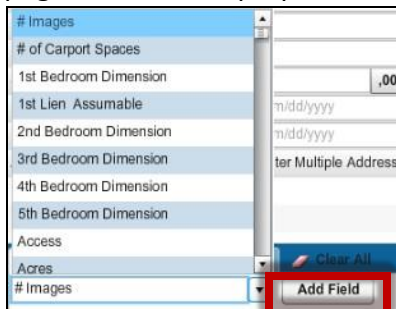Rearrange fields on the search criteria page:

1. Move your cursor over the field you want to move.
2. Hold down the left mouse button and drag the field to its new location.
3. Release the left mouse button.

Clearing a Field:

To clear an input field:

Click the clear button ✐ icon)

Search Operators

Operators determine how Fusion uses your search criteria. Common operators include

- is
- is not

- contains
- starts with

- between

If you have entered criteria for a field, the operator in use appears next to the field name.
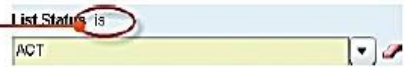
For fields that do not yet contain criteria, move your mouse over the field to display the operator.
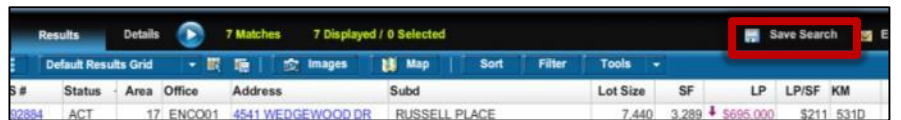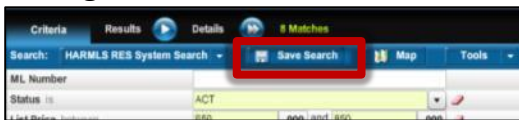
The options that are available for a criteria field vary, depending on what type of input the field accepts (such as dates, text, or numbers).

To change the criteria operator for an input field:

1. Click the operator to open the available operators list.

2. Click the list's expand button to expand the available options list.

3. Select an option from the list.
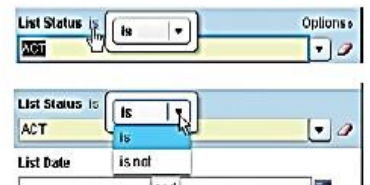
Saving Searches

You can save search criteria that you run often, or want to use for a prospect or hotsheet.

To create a new saved search

1. Set your search criteria. View the results on the results screen, if desired.

2. Click the **Save Search** button to open the save search screen.

3. Type a name in the **Search Name** box.

4. If desired, type a description of the search in the **Description** box.

5. Depending on your permission level, you may have the option to make the search available to your firm, office, or just yourself.

6. If you want to attach the search to a contact, click the **Notification Settings** button and set the notification options.

7. Click **Save**.

Hotsheet Gadget

The "Today's Hotsheet" gadget on the home screen allows you to quickly and easily view activity that has occurred since midnight.
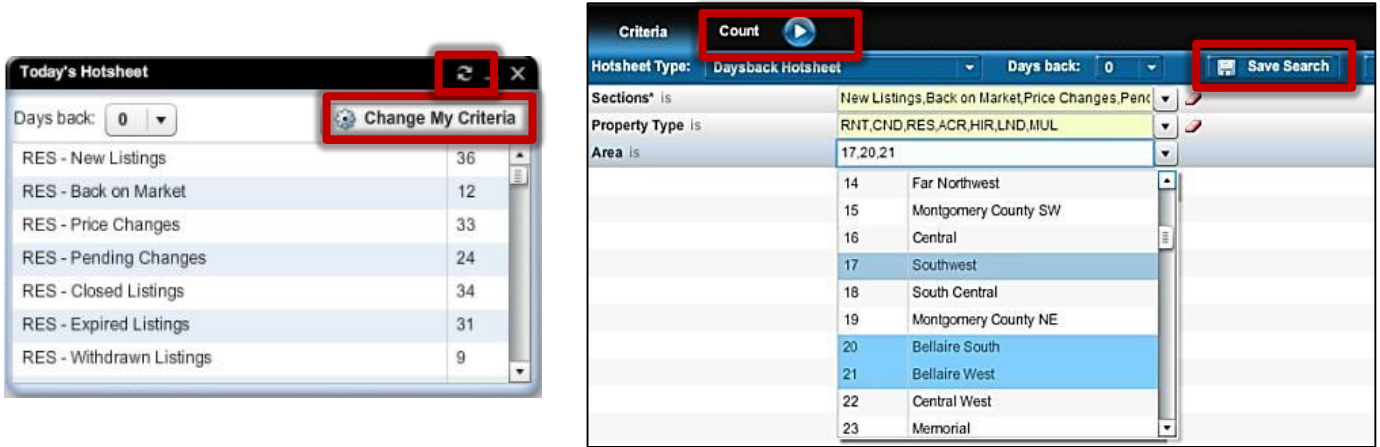
The Today's Hotsheet gadget defaults to all property types, all types of activity and all MLS areas. To customize those variables, click the Change My Criteria button in the top right of the gadget, make your selections on the next screen then click the Save Search button in the upper right. Once saved, you can click the Count menu to view the results. You can also click the Home tab, click the refresh icon 🔄 to update the gadget to reflect the result count of your new criteria then, click the number shown to view full property result details.

Custom Hotsheet

You can further customize the Hotsheet search/results by incorporating saved custom search criteria. Your results will then reflect the properties that meet your saved custom criteria and that have also had specific Hotsheet activity since midnight.
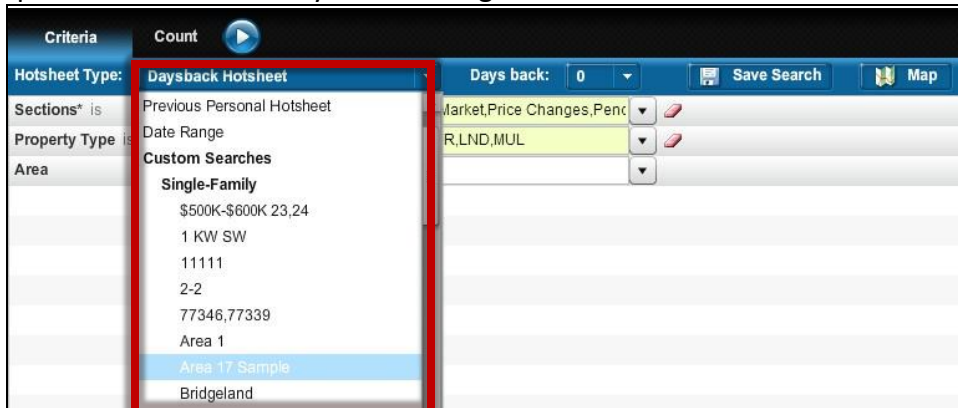
Search by Map

The search map, available from the search criteria screen, enables you to define search areas in addition to or instead of the text fields of criteria you may have included. It also displays the location of listings that match your current search criteria. Click the map button to enable or hide the map. You can also create a saved custom search that includes mapping as criteria.


With the map search feature, you can draw shapes on a map to define geographical search areas. These search areas can be circular, rectangular, or polygonal. You can have up to 5 shapes on the map at once.

When you use map search, Fusion applies any other search criteria you have entered on the criteria screen.

Drawing Map Shapes

To draw a circle on the search map:

1. From the map tools panel on the search map, click the **Pencil** icon. Select the **Radius Tool**.

2. Place your cursor on the location you want to make the center of the circle. The cursor should look like a crosshair [+].

3. Click and release the mouse to set the center point.

4. Move the cursor to adjust the circle's radius.

5. Click the mouse to set the circle.
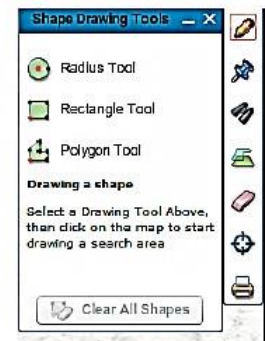
To draw a rectangle on the search map:

1. From the map tools panel on the search map, click the **Pencil** icon. Select the **Rectangle Tool**.

2. Place your cursor on the location you want to make the first corner of the rectangle. The cursor should look like a crosshair [+].

3. Click the mouse to set the corner.

4. Move your cursor to the location you want to make the opposite corner of the rectangle.

5. Click the mouse to set the corner.

To draw a polygon on the search map:

1. From the map tools panel on the search map, click the **Pencil** icon. Select the **Polygon Tool.**

2. Place your cursor on the location you want to make the first point of the polygon. The cursor should look like a crosshair [+].

3. Click the mouse to set the point.

4. Continue setting points until your polygon is defined.

5. To close the polygon, click the first point you set, or double click.

To remove a shape from the search map:

Click the shape's clear button

To remove all shapes from the search map:

From the map tools panel, click **Clear All Shapes.**
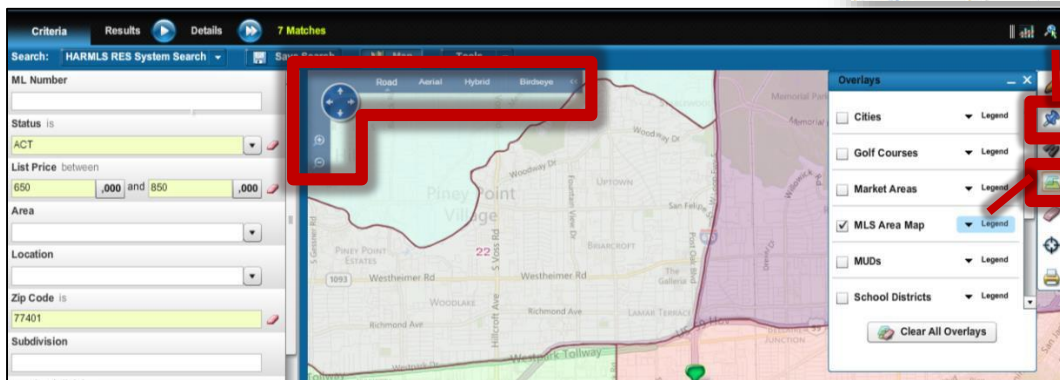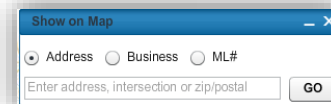
Use the locator tool 📌 to mark a certain location on the map (i.e. specific address, business by name, MLS#). The Overlays menu 🖼 found in the center of the toolbar on the right of the map offers additional mapping tools that can aid in your property search. Check the box to the left of the overlay layer(s) that you wish to enable. Use the navigation tools in the upper left area of the map to zoom in and out, pan and view the Road, Aerial, Hybrid or Birdseye map views.
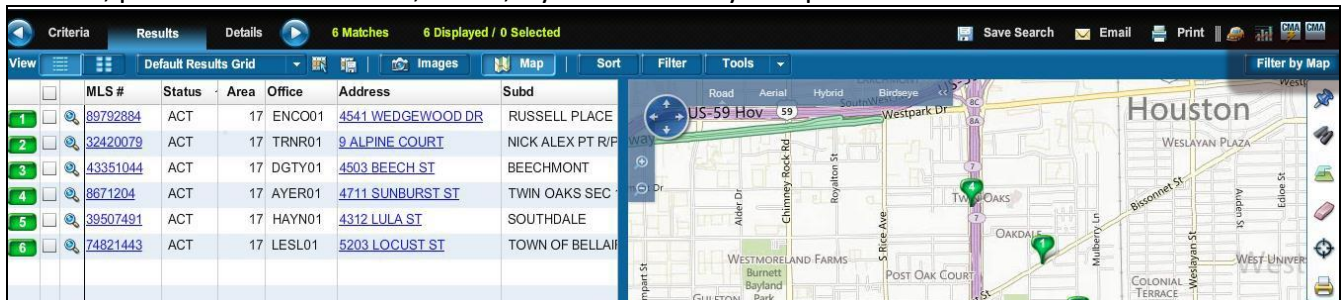

When viewing the results on the map, you can click to enable the Filter by Map feature. Once enabled, pan and zoom to change the map view and filter the results list on the left to reflect only what is shown in the current map view. Click the Filter by Map button again to disable the function.

Customize the Results Grid

With the grid manager, you can create custom grids that display the columns you want to see, in the order you want them to appear. You can set default grids and specify the sort order for your custom grids.

To Create a New Search Results Grid

1. Click the grid manager icon 🖼 to open the grid manager.

2. Click **Create New Grid** to open the grid editor.

3. Type a name for the grid in the **Grid Name** box.

4. Move the fields you want to appear in the grid from the **Available Fields** list to the **Included Fields** list.

   ▸ Drag and drop fields between lists.

   ▸ Click a field to select it, and use the move right and left buttons to move it between lists.

   ▸ Hold down the CTRL key while clicking fields to select multiple fields.

   ▸ Hold down the Shift key to select a range of fields.

   ▸ Type a field name (or part of a field name) in the **Search for field** box to narrow the list of available fields.

5. Arrange the included fields in the order you want them to appear.

   ▸ Drag and drop fields

   ▸ Click a field to select it, and use the move up and down buttons to move it up or down.

6. If desired, you can modify the formatting for the included fields.

   6.1. Click a field to select it.

   6.2. Click the **Format Field** button to open the field formatter

   6.3. Modify the formatting as needed.

   6.4. Click Save to return to the grid editor.

7. Click **Save.**
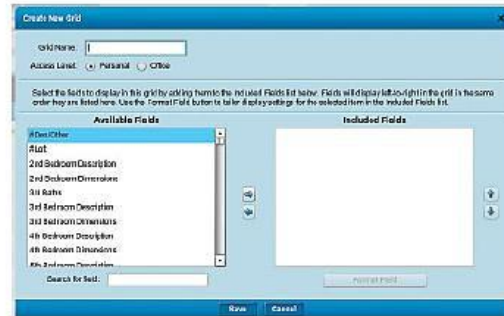
Field Format Settings

A field's format settings determine how the field is displayed in the grid.

Depending on the type of field, some settings may be disabled.

Column Header: the text that appears at the top of the grid column.

Prefix: text that precedes data displayed in the column. For example, if the prefix is "approximately" then all data in the grid column will be prefaced by the word "approximately."

Suffix: text that follows data displayed in the column. For example, if the suffix is "or more" then all data in the grid column will be followed by the word "approximately."

Alignment: text alignment in the column (left, middle, or right).

Field mask: sets formatting for numeric fields. For example, selecting ####.00 results in numeric data being displayed to two decimal places. Selecting ##,###,### results in a comma being used to separate thousands groups in the large numbers.

Display Format: used for listbox fields. Specifies whether short codes or full descriptions will be displayed.

Use this format for all fields in this grid: used for listbox fields. If this check box is selected, the Display Format setting will be applied to all listbox fields in the grid.

Column width: sets the width for the grid column.

To Edit a Grid

You can edit grids that you have created. Depending on your permission level, you may be able to edit other grids (for your office or firm) as well.

If you want to make changes to an office-, firm-, or system- level grid that you do not have permission to edit, make a copy of the grid and edit the copy.
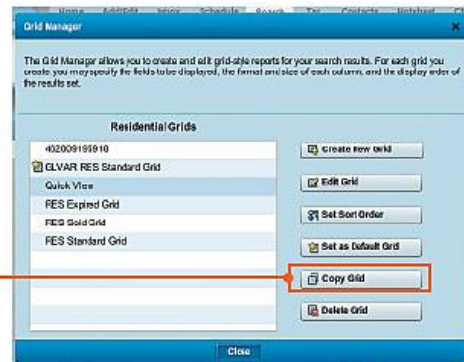
1. Click the grid manager icon to open the grid manager.
2. Click the grid you want to edit, to select it.
3. Click the **Edit Grid** button to open the grid editor.
4. Make any desired changes to the grid name, included fields, or field formats.
5. Click Save.

To Copy a Grid

When you copy a grid, it cannot have the same name as the original.

1. Click the grid manager icon to open the grid manager.
2. Click the grid you want to copy, to select it.
3. Click **Copy Grid** to open the grid editor.
4. Type a new name in the **Grid Name** box, or accept the default.
5. Make any other desired changes.
6. Click Save.

To Delete a Grid

You can delete any grid that you have created. Depending on your permission level, you may be able to delete other grids (for your office or firm) as well.

1. Click the grid manager icon ⚏ to open the grid manager.

2. Click the grid you want to delete, to select it.

3. Click **Delete Grid**.

4. When prompted to confirm the deletion, click Yes.

To set the default grid:

The default grid is the grid that automatically loads when you open a page that uses a grid to display data, such as the search results page or the contact manager. Your current default grid is indicated by a star icon in the grid manager.

1. Click the grid manager icon ⚏ to open the grid manager.

2. Click the grid you want to set as the default, to select it.

3. Click Set as **Default Grid**.
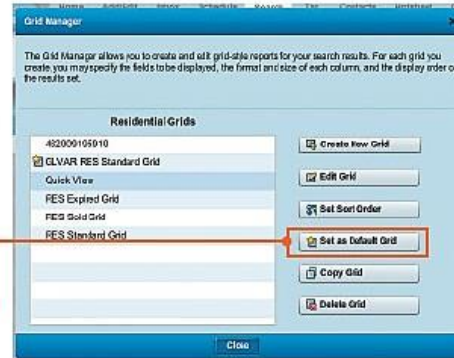
To Set the Sort Order for a Grid

You can set the sort order for grids that you have created. Depending on your permission level, you may be able to set the sort order for other grids (for your office or firm) as well.

You can sort on up to three columns.

1. Click the grid manager icon ⚏ to open the grid manager.

2. Click the grid whose sort order you want to set, to select it.

3. Click **Set Sort Order** to open the sort order screen.

4. Select a column from the **Sort By** list.

5. Select **Ascending** or **Descending**.

6. Select additional sort fields from the **Then By** lists as needed, and set the sort direction for each.

7. Click Save.
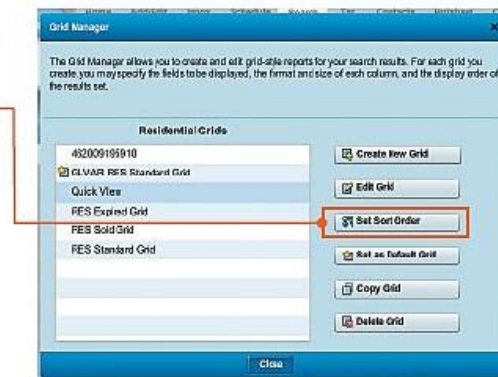

To reorder grid columns:

You can drag and drop columns in any order you choose.

1. Place your cursor over the heading of the column you want to move.

2. Hold down the left mouse button.

3. Drag the column to its new position.

4. Release the left mouse button.

The Gallery View

Gallery view displays search results as thumbnail images and summary information.

To select a Gallery View:

Click the gallery **View** button [icon] under the search task bar.

The button on the image indicates which photo is being displayed: **1/11**, for example, means that the first photo out of 11 is currently shown. Click the button to cycle through the available images.

The Image Viewer

The search results image viewer displays the primary photo for all of the listings returned by a search.

The results grid automatically highlights the listing whose photo is currently displayed.

To select an image to view:

Click an image in the image viewing pane to bring it to the center.

Click a listing in the search results grid to bring its photo to the center of the image viewing pane.

Driving Directions

To get driving directions from the search results screen:

1. Select the check box next to the listings you want directions to.

2. From the search task bar, click the **driving directions** icon [icon] to open the directions input screen. The selected listings' addresses will appear in the address list.

3. Add, remove, or reorder addresses as desired.

4. Select route options.

5. Click **Get directions**.
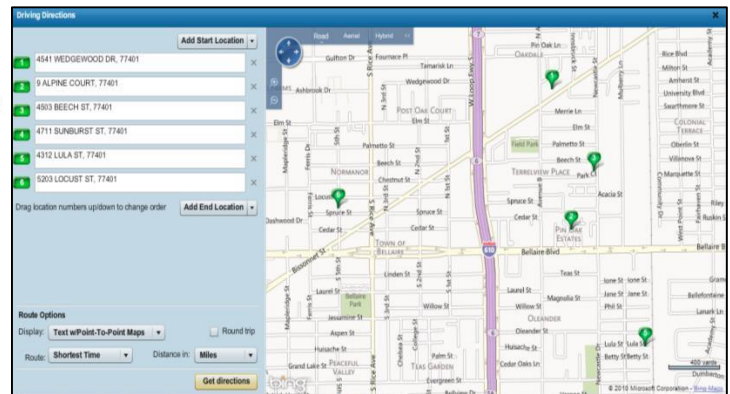
To get driving directions for a listing directly from the map:

1. Right-click a listing "pin" on the map to open a context menu.

2. Select an option (**Drive to here** or **Drive from here**) to open the driving directions input screen. Depending on the option you select, the listing's address will be in the starting or ending position.

3. Add, remove, or reorder addresses as desired.

4. Select route options.

5. Click **Get directions**.
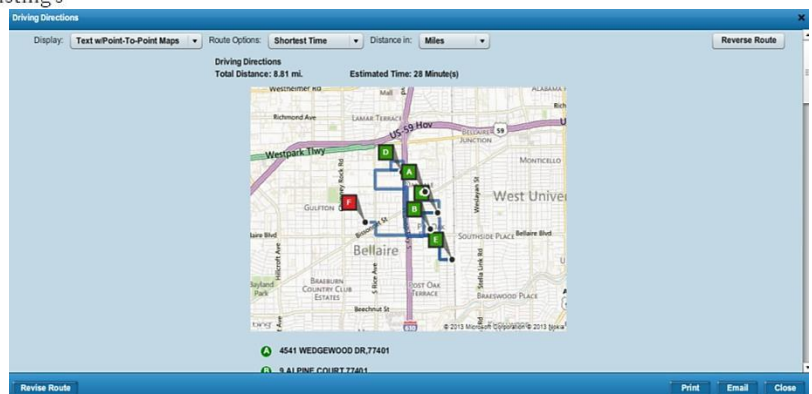
Statistics Professional

Powerful and Flexible MLS Data Analysis

Statistics Professional by CoreLogic® delivers real-time statistical reporting and charting capabilities for any group of listing search results, making it easy for users to quickly analyze and understand their market.

Features & Benefits

- Compile dynamic, real-time statistics and charts using any normal search query
- Brand, personalize and interact with the reports to get the look and results you need
- View data trends and period comparisons by Week, Month, Quarter and Year with enhanced visuals and graphics
- Analyze key performance and productivity metrics by Agent, Office and Firm
- Descriptive hover over text and glossaries on the reports explain every calculation and how to interpret (customizable by site)
- Request any report customization at the site level to address unique MLS requirements
- Save personalized views of system reports to your Personal Folder
- Refresh and run reports directly from your History list
- Export to PDF, Excel, Flash and other options, depending on report type
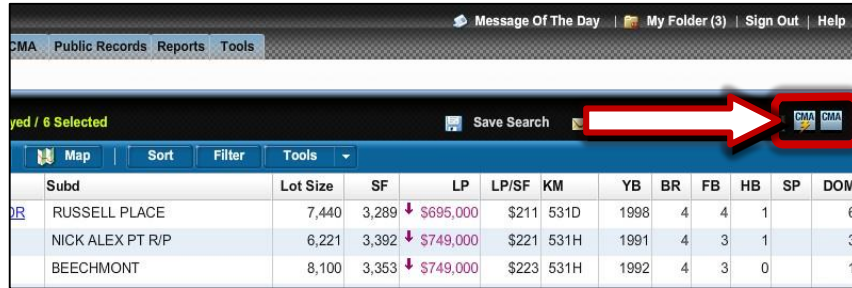- Access rights to the reports can be defined by User Class

Benefits

- See the data you want to see
- A dedicated server for maximum performance
- Reports that keep you on top of the market
- Colorful charts to increase impact
- Flexible statistics interface

CMA Reports

Fusion MLS offers two CMA Reports: The Quick CMA [CMA] and the CMA Wizard [CMA]. The icons for the Quick CMA and the CMA Wizard are located in the upper right corner of the results page.

The Quick CMA or CMA Summary, generates a one page report which breaks the property results into individual grids by property class with minimum, average and maximum statistical information at the bottom of each.


CMA Summary

Property Type: Single-Family   Status: Active   Number of Properties: 9

#	ML #	Address	Subdivision	Pool	BR	FB	HB	Gar #	SqFt	LP	LP/Sqft	DOM	CDOM	Yr Blt
1	81383847	4430 HAZELTON ST	WILLOWBEND 4	N	3	2	0	2	2,014	$199,500	$99.06	73	226	1955
2	8930368	4838 WILLOWBEND BL	WILLOWBEND	N	3	2	0	2	1,800	$220,000	$122.22	40	224	1955
3	56379490	4729 BRIARBEND DR	WILLOWBEND 3	N	3	2	0	2	1,843	$223,900	$121.49	202	202	1955
4	2171450	4733 Briarbend	WILLOWBEND	N	3	2	0	2	1,820	$229,000	$125.82	11	11	1955
5	92379646	4826 Waycross	Willowbend	N	3	2	0	2	1,852	$259,000	$139.85	395	573	1955
6	98241435	10501 GREENWILLOW ST	WILLOWBEND 6	N	3	2	1	2	1,944	$268,000	$137.86	207	207	1955
7	23178334	4313 WAYCROSS	Willowbend	N	3	2	0	2	2,083	$285,000	$136.82	240	240	1955
8	49184400	4738 WILLOWBEND BL	WILLOWBEND 2	N	3	2	0	2	2,188	$315,000	$143.97	26	26	1955
9	12829364	4518 CREEKBEND DR	WILLOWBEND	Y	3	2	0	2	2,161	$360,000	$166.59	52	52	1955
		Minimum			3	2	1	2	1,800	$199,500	$99.06	11	11	1955
		Average			3	2	1	2	1,967	$262,156	$132.63	138	196	1955
		Maximum			3	2	1	2	2,188	$360,000	$166.59	395	573	1955

Property Type: Single-Family   Status: Option Pending   Number of Properties: 2

#	ML #	Address	Subdivision	Pool	BR	FB	HB	Gar #	SqFt	LP	LP/Sqft	DOM	CDOM	Yr Blt
1	5502046	4322 TONAWANDA	WILLOWBEND	N	3	2	0	2	2,066	$339,000	$164.09	127	127	1955
2	69566976	4705 TONAWANDA DR	WILLOWBEND 2	N	3	2	0	2	2,174	$355,000	$163.29	33	155	1955
		Minimum			3	2		2	2,066	$339,000	$163.29	33	127	1955
		Average			3	2		2	2,120	$347,000	$163.69	80	141	1955
		Maximum			3	2		2	2,174	$355,000	$164.09	127	155	1955

Property Type: Single-Family   Status: Pending   Number of Properties: 1

#	ML #	Address	Subdivision	Pool	BR	FB	HB	Gar #	SqFt	LP	LP/Sqft	DOM	CDOM	Yr Blt
1	88090522	4405 TONAWANDA DR	WILLOWBEND 4	N	3	3	0	2	2,175	$314,999	$144.83	165	165	1955
		Minimum			3	3		2	2,175	$314,999	$144.83	165	165	1955
		Average			3	3		2	2,175	$314,999	$144.83	165	165	1955
		Maximum			3	3		2	2,175	$314,999	$144.83	165	165	1955

Property Type: Single-Family   Status: Sold   Number of Properties: 2

| #	ML #	Closed Date	Address	Subdivision	Pool	BR	FB	HB	SqFt	LP	Gar	LP/SF	SP	SP/SF	SP/LP	DOM	CDOM	Yr Blt
1	41478141	11/17/2011	4845 BRIARBEND DR	WILLOWBEND 1	N	3	2	0	2,051	$195,000	0	$95.08	$177,000	$86.30	0.908	157	157	1955
2	72841449	12/15/2011	4826 Creekbend	WILLOWBEND	N	3	2	0	2,066	$274,900	2	$133.06	$269,590	$130.49	0.981	6	6	1955
			Minimum			3	2		2,051	$195,000	2	$95.08	$177,000	$86.30	0.908	6	6	1955
			Average			3	2		2,059	$234,950	2	$114.07	$223,295	$108.40	0.945	82	82	1955
			Maximum			3	2		2,066	$274,900	2	$133.06	$269,590	$130.49	0.981	157	157	1955

The **CMA Wizard** features more detailed property pages, charts and graphs and allows for adjustments such as closing costs and repairs. An unlimited number of additional personal pages (market plan, personal bio, company history, etc.) can also be imported and incorporated into the final CMA.
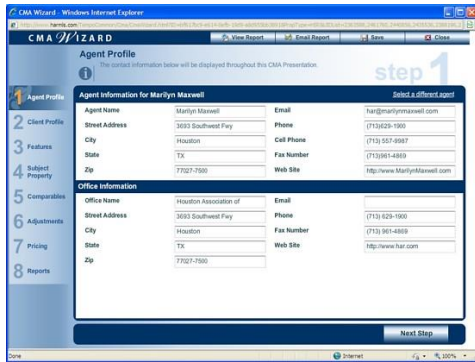

Wizard Step 1: Review/Edit your personal information
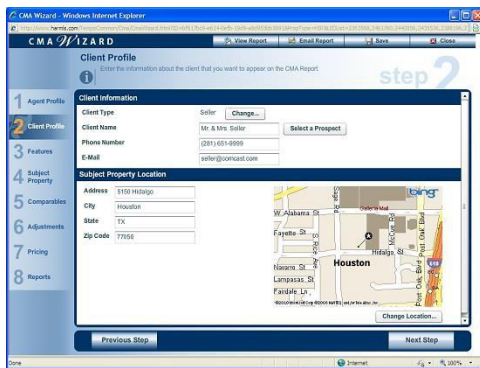
**Wizard Step 2**: Complete the client and subject property information
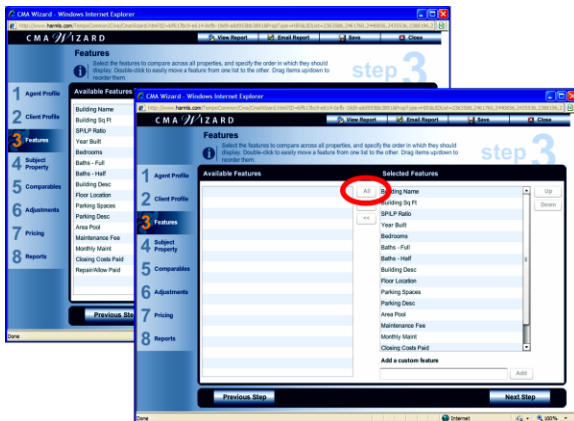
Wizard Step 3: Select the features that will be used as column or field headers in the CMA (usually "All"). These items can be rearranged to suit your preferences and/or to remove or add them to the list. Whatever is on the right side of the screen will be included on the pages throughout your final report.
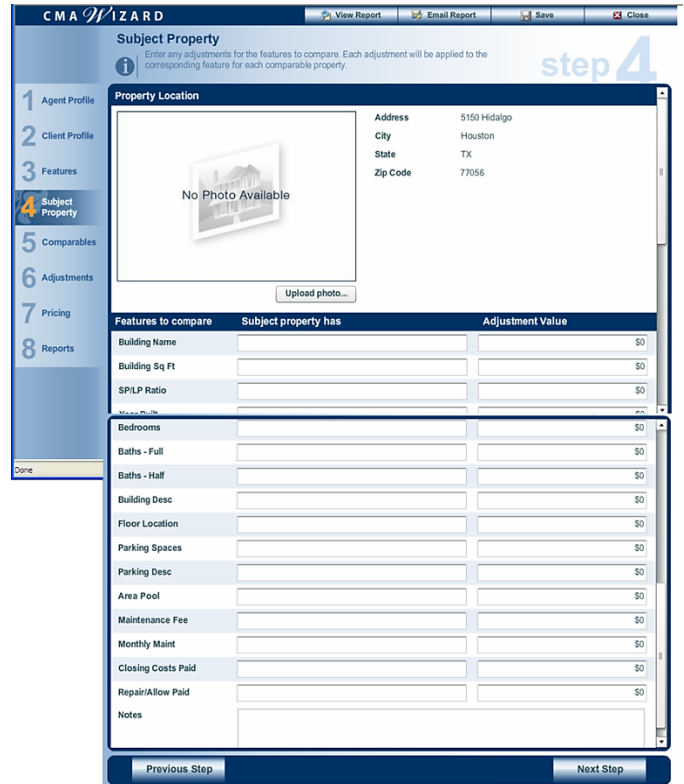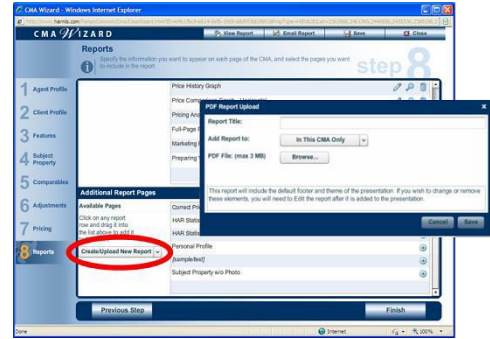

Wizard Step 4: Complete as many items about the subject property as possible, leaving those blank that you do not know or that are not relevant at this time (i.e. Days on Market, etc.). Upload a subject property photo if available or be sure to adjust the settings of the cover page to accommodate no photo prior to printing the final report in Wizard Step 8.
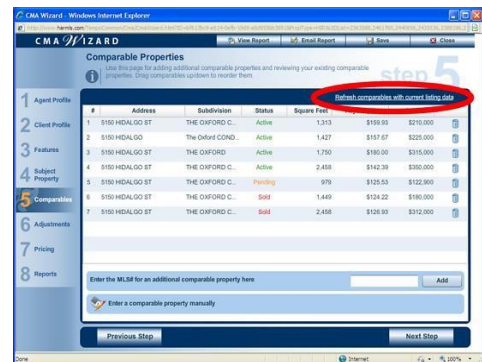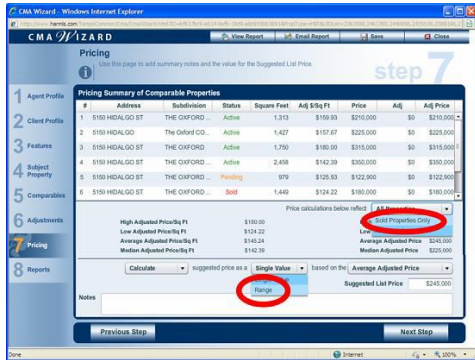

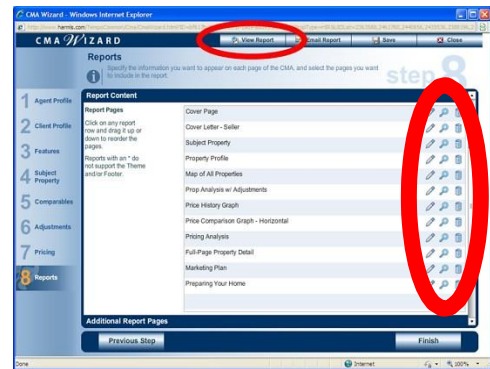**Wizard Step 5**: Review the comps. Add, remove or refresh with current Tempo data if necessary
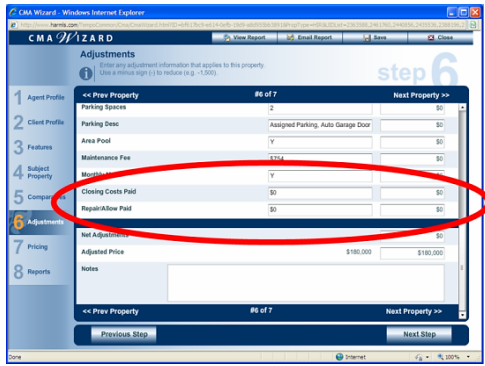
Wizard Step 6: Scroll down to account for adjustments in the Closing Costs or Repairs

Wizard Step 7: Be very sure to select "Sold Properties Only" and "Price Range" from the drop-down menus.

Wizard Step 7 (cont.): Use the percentage of difference from the Quick CMA to fill in the blank for the range percentage or 'swing'.
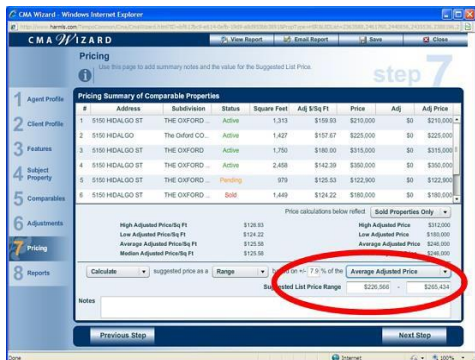

Wizard Step 8: In addition to choosing a custom theme, adding page numbers, etc., you can also import an unlimited number of additional PDF documents to supplement the Wizard pages.

Wizard Step 8 (cont.): Use the pencil icon to minimally edit pages, the magnifying glass to preview that page and the trash can to delete that page from this current CMA. View/Print CMA using the "View Report" button at the top of the page. The CMA can also be sent via email using the "Email Report button" also at the top of that screen.