

Client Portal 7.0 – For Consumers

Thanks for watching our video on how to navigate through the NorthstarMLS Customer Portal. The Portal is a central repository and it's how you will view the listings, reports, statistics, CMAs and driving directions that your real estate agent shares with you.

Let's take a quick tour of the portal to highlight some of the portals features and I'll show you how to use it to your best advantage.

1. To begin, you'll need to access your portal. To do that on your desktop or mobile device, simply click on the notification link emailed to you by your agent.

When you open it, the portal will automatically adjust to the dimensions of whatever device you're viewing it on.

2. Now that we're in, let's explore each of the options that will allow you to view detailed information about a property, categorize listings according to their priority and communicate directly with your agent within the portal.

3. When you open the portal link from your email, you'll be viewing the results in the current default display – which is Date Received.

The results can also be sorted by Price or Square Footage. Click the drop down to select a different view.

4. Map View is the default display when the portal opens. Use the zoom in and zoom out buttons to get a closer or more distant look of all available properties on the map.

Use the Draw tool to make a shape around a certain area on the map that you'd like to view.

5. You can change the display by selecting a new one from the additional formats that are available, like list view, gallery view and several others.

6. To view a specific listing in more detail, click on the listing's address – it's a clickable link. Once you click, you can view a General Description of the property, Interior and Exterior Features of the property and other Features about the listing.

You can choose to view additional photos of the listing if available. (Probably should leave this out for now since – or I can mention it, but probably can't do anything on screen with the pic viewer).

7. If you want to message your agent directly about the listing you're viewing – maybe you want to know how old the carpet is. Just click the Add Note button and you can drop your agent a message right from the portal that they can respond to.

Once your agent responds, you'll find the message under the Messages tab. Click on the Property Notes tab to view the conversation.

To view any other notifications sent to you by your agent click the Messages tab.

8. For an expanded view of the map, click on the map and it will open in a new window. Use the drop down in the top left to toggle between map and satellite view (Google Street View?). The zoom in and zoom out buttons are on the right-hand side.

Click the Layers icon and list of options to include on the map will appear. If you want to add any additional Boundaries, put a check mark in the check box and it will show on the map. You can also add Point of Interest – such as restaurants and shopping malls.

Note that for some of these options, you'll need to be zoomed in or zoomed out for them to show on the map. The red text will indicate if you're not zoomed enough.

9. To help you organize listings that may or may not be of interest to you, the portal allows you to categorize properties as a favorite, possibility or discard it if you're not interested.

Click the heart if you want to mark the listing as a favorite. Click the heart with a yellow outline to mark it as a possibility. If you're not interested, click the trash can to discard it. You can remove any of these marked listings at any time.

10. To access your collection of listings you've marked, click the Favorites tab. (kind of weird they call it the Favorites tab, when it's all the listings you've marked – possibilities and discards too. Got to be a better name for that tab you'd think, IMO).

Additionally, click the Possibilities tab to see any listings you've marked as that. And the Discarded tab shows you any listings that you were not interested in.

11. My Searches tab will show you all the Searches that your agent has created for you. Click the Search name and that search will open for you, along with the listings included in the search.

If you have any questions about the Client Portal, contact the real estate professional that you are working with.