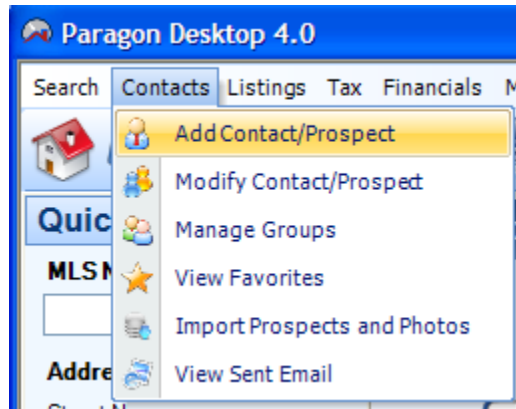


The Contact Manager has a series of workflow tabs starting with General Information of your contact. This page is where you will enter the typical information such as names, addresses, phones, email, etc. Always start with the General Information tab. Contacts can be synchronized with the Paragon 4 online system so that all information can be found and used on both systems. See the Synchronize Quick Start Guide for more information.

From the main menu, Click **Contacts** and Click **Add Contact/Prospect**.



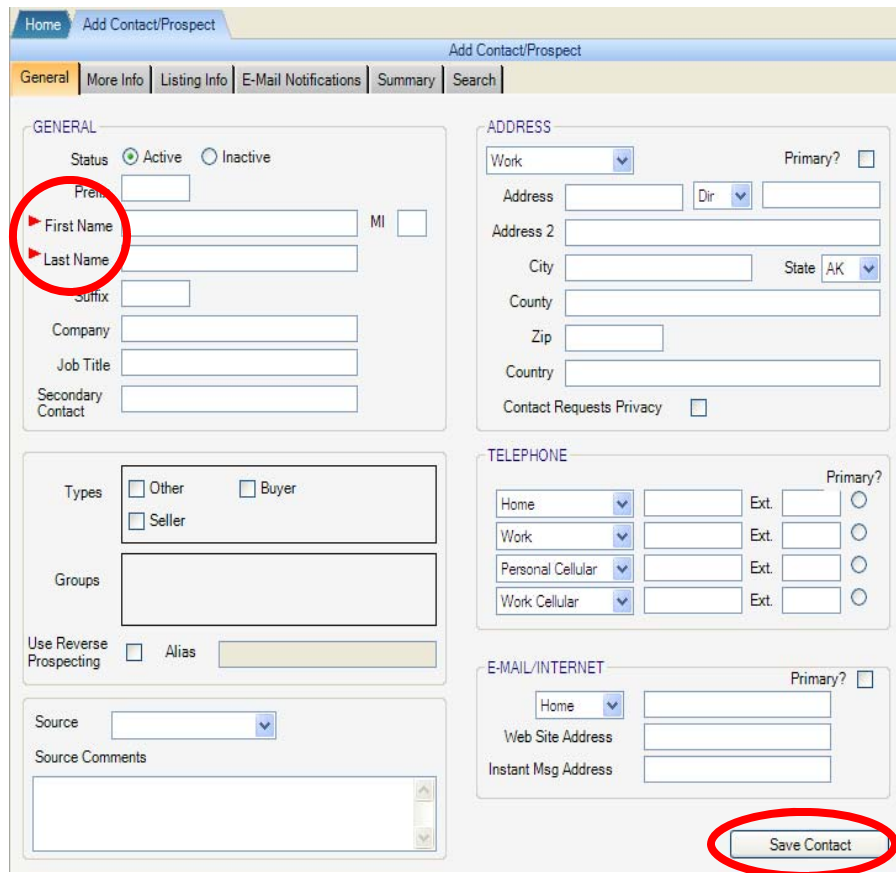
The General info tab will be open ready for your contact info. Fill in the boxes with as much info as you have. The more info you can save now, the better prepared you will be every time you contact them.

There are only 2 required fields—First and Last Name.

There is a Quick Start Guide for each tab.

Page 2 & 3 of this guide will help you fill in the General info tab.

Please note the Save Contact button.

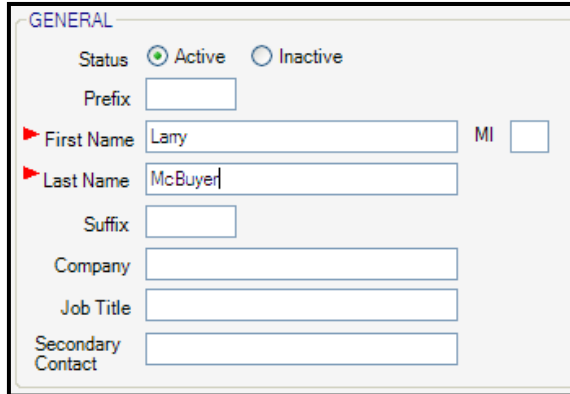


The screenshot shows the 'Add Contact/Prospect' form with the following sections:

- GENERAL:** Status (Active/Inactive), Prefix, First Name, Last Name, Suffix, Company, Job Title, Secondary Contact. *First Name and Last Name are circled in red.*
- ADDRESS:** Work (dropdown), Primary? (checkbox), Address, Dir (dropdown), Address 2, City, State (dropdown), County, Zip, Country, Contact Requests Privacy (checkbox).
- TELEPHONE:** Primary? (checkbox), Home, Work, Personal Cellular, Work Cellular (dropdowns), Ext., Primary? (radio buttons).
- E-MAIL/INTERNET:** Primary? (checkbox), Home (dropdown), Web Site Address, Instant Msg Address.
- Types:** Other, Buyer, Seller (checkboxes).
- Groups:** (empty list box).
- Use Reverse Prospecting:** Alias (checkbox), (input field).
- Source:** (dropdown), Source Comments (text area).
- Save Contact:** (button, circled in red).

The first module is simple enough to fill in. When you are later searching for contacts, there is an Active/Inactive filter available. Some contacts may not be actively looking for a home.

**(Note: Inactive contacts are purged after a certain number of months of being inactive, based on MLS Rules and Regulations.)**



**GENERAL**

Status  Active  Inactive

Prefix

First Name  MI

Last Name

Suffix

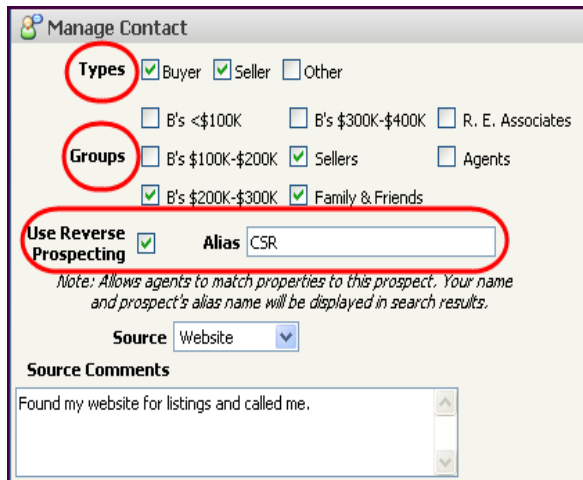
Company

Job Title

Secondary Contact

Groups help you define a contact and makes it easier to find them for sending new or changed listings to or changes to your business.

**Note: Reverse Prospecting is a Paragon 4 online optional tool that Listing Agents can use to notify you, the agent, when they have a listing that matches one of your buyers.**



**Manage Contact**

**Types**  Buyer  Seller  Other

B's <\$100K  B's \$300K-\$400K  R. E. Associates

**Groups**  B's \$100K-\$200K  Sellers  Agents

B's \$200K-\$300K  Family & Friends

**Use Reverse Prospecting**  Alias

Note: Allows agents to match properties to this prospect. Your name and prospect's alias name will be displayed in search results.

Source

**Source Comments**

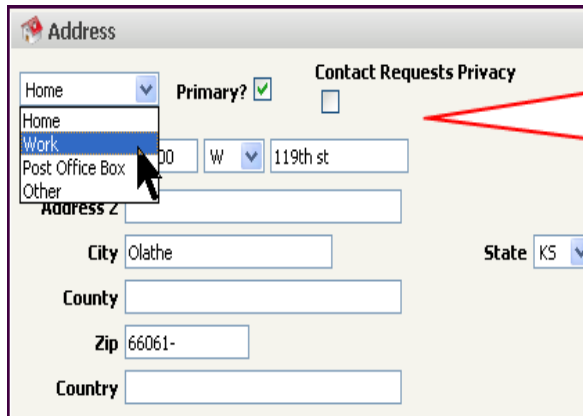
A contact can be a Buyer and a Seller

They can be included in several groups.

See "Manage Groups" on how and why to create groups.

Add an address for home, then go to the drop down and click **Work**. Then add the address for their work.

Primary tells Paragon that this is the main address for when Paragon pulls an address for an auto-fill situation such as the Cover Letter in the CMA presentation.



**Address**

Home  Primary?  Contact Requests Privacy

Home  W

Post Office Box

Other

Address 2

City  State

County

Zip

Country

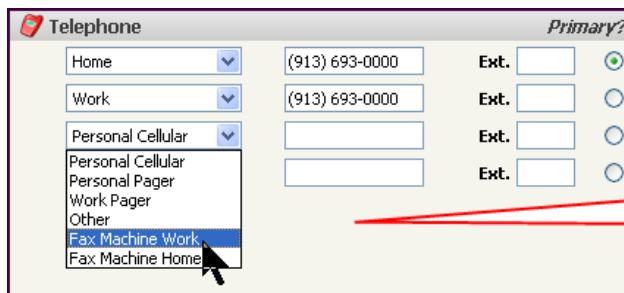
The drop down menu will let you add several addresses.

Contact Requests Privacy is a "flag" to you to not include them in bulk marketing

## Adding a Contact

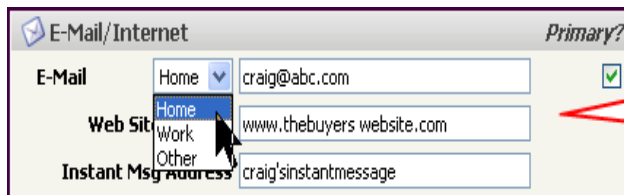
### Quick Start Guide Paragon Desktop 4.0

Phone numbers for a client could be many and the drop down choices will let you choose a specific name for each one.



As with Addresses, you can have multiple phone numbers for your contact.

When you have multiple email addresses for a contact, mark one as the primary. Some Paragon email functions will then know which address to use in an email compose box for you. Such as on the Auto - Notification email function.



Multiple E-mail addresses can be listed. Make one the primary.

Always save your General Contact information before you move on to another tab.

