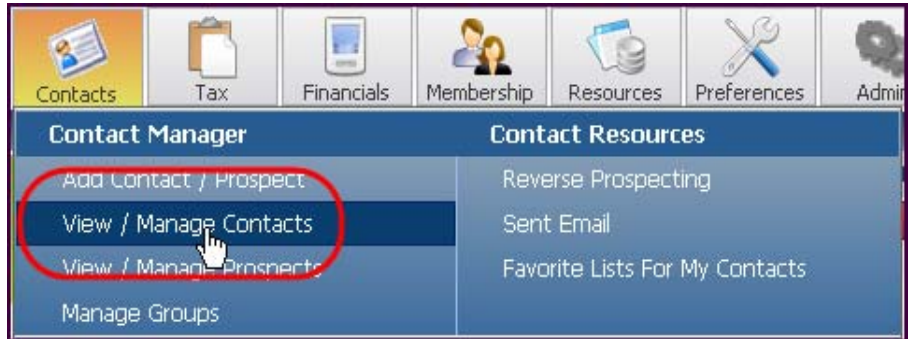




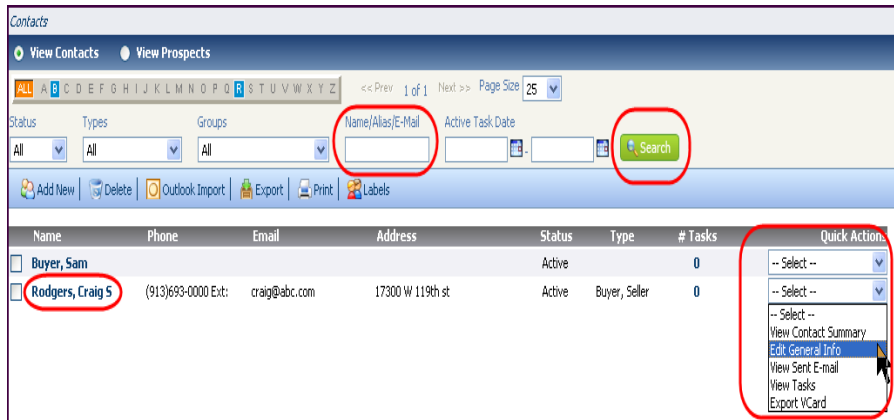
Contact Manager-Assign/Add a Search Quick Start Guide Paragon 4.0

Once you have the general information for a prospect in and saved, you can then assign a previously saved search of their criteria or add a search and then assign it to the prospect. When the search has been saved and assigned to the prospect, the Paragon system will then start the auto searching tool for that prospect. Auto-Searching means that Paragon will do a daily search for your prospects for you. You do not even need to be on the computer. Auto-Search needs to be set up in order to use the Auto-Notification tool in Paragon.

To view a list of contacts in order to add items or make changes to existing contacts, click the **Contacts** button, and in the Control Panel, click **View/Manage Contacts**.



The Manage Contacts screen will appear with your contacts listed in a one line spread in alphabetical order. A search tool is available to quickly find a contact. The contact names are a link to open their general information tab. The drop down menu gives you other options.



You can add, delete, or import contacts from Outlook, export contacts in a V-card format, print out the list of contacts, and create mailing labels.



This tool bar will import contacts from Outlook, Export contacts in a V-card format, Create mailing labels.



Contact Manager-Assign/Add a Search Quick Start Guide Paragon 4.0

When you click on the name of a contact, the general information tab for them will appear. Click the **Listing Info** tab. This box will show several options for this contact. Saved Searches will allow you to assign a previously created and saved search to this contact. Click **Assign** and a list of saved searches will appear. Click in the box of the search name and click **Save**.

| E-mail Notify | Voice Alerts | Name | Matches | New | Changed | Quick Actions |
|---------------|--------------|---------------|---------|-----|---------|---------------------------|
| Off | Off | Craig Rodgers | 28 | 28 | 0 | Assign Add New Delete |

The saved search will appear under the Saved Searches lined columned list. There are several links to tools. As you roll your mouse over an item, click on it to see it's action.

| E-mail Notify | Voice Alerts | Name | Matches | New | Changed | Quick Actions |
|---------------|--------------|---------------|---------|-----|---------|---------------------------|
| Off | Off | Craig Rodgers | 28 | 28 | 0 | Assign Add New Delete |

When you click on the name of the search, it will open for you to view it, run it, or make changes to it.

| E-mail Notify | Voice Alerts | Name | Matches | New | Changed | Quick Actions |
|---------------|--------------|---------------|---------|-----|---------|---------------------------|
| Off | Off | Craig Rodgers | 28 | 28 | 0 | Assign Add New Delete |

Under the E-mail Notify column, the Off link will open an auto-notification set up page. Voice Alerts is a Paragon Option. Your MLS may or may not have signed up for this tool. New and Changed is where Paragon will show you Listings that match your search as a new listing on the MLS or a price changed existing listing.

Following the work flow of the Contact Manager, you could do their first search and save it from here. Always do the first search manually. Click **Add New**.

| E-mail Notify | Voice Alerts | Name | Matches | New | Changed | Quick Actions |
|---------------|--------------|---------------|---------|-----|---------|---------------------------|
| Off | Off | Craig Rodgers | 28 | 28 | 0 | Assign Add New Delete |



Contact Manager-Assign/Add a Search Quick Start Guide Paragon 4.0

Choose the class for their search, then click **Apply**.

Back To Listing Info Tab

Class

Residential-Farm Multi-Family

Classes Vacant Land Commercial-Industrial

Multi-Class

Apply

Your default search screen will open. Put in the criteria for this buyer, click **Count**. Adjust your criteria as needed to get inventory.

Please Note: You can include a map search criteria field in a saved search, associate it to a buyer prospect and have the Auto—Search and Auto—email functionality.

Back To Listing Info Tab > Property Search

Load Search | Customize Search | Save Search

Primary Criteria Open All | Close

Area: Cen,Hyd,Met

Status: ACT

Closing Date: Begin End

Price: Low 175,000 High 200,000

Type

Municipality

Beds: Min 4 Max

Full Baths: Min 2 Max

Half Baths: Min Max

Total Baths: Min Max

Square Feet: Min Max

Mapping [Click Here to Launch Map](#)

Acres: Min Max

Count: 29

Available Reports

Agent Spreadsheet

Top 5 Favorite Views

- Agent Spreadsheet
- All Fields Detail
- Map
- Agent Report
- Client Detail

Criteria Summary

| | | |
|-------------------------------------|------------|-----------------|
| <input checked="" type="checkbox"/> | Price | 175,000-200,000 |
| <input checked="" type="checkbox"/> | Beds | > 4 |
| <input checked="" type="checkbox"/> | Full Baths | > 2 |
| <input checked="" type="checkbox"/> | Status | ACT |
| <input checked="" type="checkbox"/> | Area | Cen,Hyd,Met |

Before you run the search, click **Save Search As**. This will auto fill the name of the contact into the name of the search. It will also automatically assign the search to the contact which will start the auto search function. This will save you time. Click **OK** and the search is saved. Your count, search, and criteria summary boxes will reappear. Click **Search** or one of your **Top 5 Favorite** views to see your search results.

Back To Listing Info Tab > Property Search

Load Search | Customize Search | Save Search

Save Search Open All | Close

Save Search As...

Area: Met,Cen,Hyd

Status: ACT

Closing Date: Begin End

Price: Low 175,000 High 200,000

Type

Municipality

Beds: Min 4 Max

Full Baths: Min 2 Max

Half Baths: Min Max

Total Baths: Min Max

Square Feet: Min Max

Mapping [Click Here to Launch Map](#)

Acres: Min Max

Save Search As...

Step 1: Name Your Search

Saved Search for Rodgers, Craig S

Step 2: Assign as Default (Optional)

Make this your DEFAULT for Residential-Farm searches.

Step 3: Save Search

template WITH criteria values

template WITHOUT criteria values

Step 4: Assign to a Prospect (Optional)

Rodgers, Craig S



Contact Manager-Assign/Add a Search

Quick Start Guide Paragon 4.0

Remember, always do your first search for a customer manually. Find some listings that you feel the customer should see and manually email or print them out from here. See the Email & Printing Listings guide.

Paragon will take over the search for new and price changed listings automatically every 24 hour period until you tell it to stop.

Note: Some fields will not work in an auto search. Paragon will tell you which ones when you save your search.

When you go back to the Listings tab, your saved search for that buyer will be listed. You can have up to 3 different saved searches per contact with auto notification available for each one.

See the Quick Start Guide for Contact Manager-Auto Notification on how to set up Paragon to automatically send listings to your clients via email while you are showing houses to other clients.

Back To Listing Info Tab > Property Search > Search Results > Agent Spreadsheet (Default)

Criteria Summary **E-Mail** Save Print Add to CMA Export Sort Customize Maintain Correction

| | HIGH | LOW | AVERAGE | MEDIAN | TOTAL PRICE | LISTING COUNT |
|-------------|-----------|-----------|-----------|-----------|-------------|---------------|
| LIST PRICE: | \$199,900 | \$175,000 | \$186,551 | \$184,900 | \$5,409,995 | 29 |
| SOLD PRICE: | \$0 | \$0 | \$0 | \$0 | \$0 | |
| CDOM: | 0 | 0 | 0 | NaN | | |

Showing Listings 29 of 29 Next: 100 Get All

Show Checked Show All Agent Spreadsheet (Default) PDF HTML Available Reports

| | MLS # | Price | PIC | Type | 1) S.. | 2) Address | 3) A.. | Municip | BR | FB | HB | SF A |
|----|----------|-----------|-----|------|--------|----------------------|--------|---------|----|----|----|------|
| 1 | 10143850 | \$179,000 | 9 | SF | ACT | 69 W Big Spring Ave | Hyd | 290 | 4 | 2 | 1 | 2195 |
| 2 | 10149485 | \$184,900 | 9 | SF | ACT | 533 C Street | Hyd | 051 | 4 | 2 | 0 | 1920 |
| 3 | 10148981 | \$185,000 | 9 | SF | ACT | 23 CONWAY DRIVE | Met | 228 | 4 | 2 | 0 | 2271 |
| 4 | 10147192 | \$198,295 | 1 | SF | ACT | 142 Creek View Dr. | Met | 186 | 4 | 2 | 1 | 1840 |
| 5 | 10141355 | \$175,000 | 9 | SF | ACT | 21 Crest Lane | Met | 383 | 4 | 2 | 0 | 2249 |
| 6 | 10134034 | \$199,900 | 3 | SF | ACT | 18753 W Dry Run Road | Hyd | 139 | 4 | 2 | 1 | 2600 |
| 7 | 10147772 | \$184,900 | 9 | SF | ACT | 583 F ST | Hyd | 051 | 4 | 2 | 0 | 1763 |
| 8 | 10147966 | \$199,900 | 8 | SF | ACT | 5071 FRANKLIN ST | Met | 407 | 4 | 2 | 1 | 1812 |
| 9 | 10147530 | \$179,900 | 1 | SF | ACT | 301 N Hanover Street | Hyd | 051 | 6 | 3 | 0 | 3180 |
| 10 | 10141803 | \$184,900 | 6 | SF | ACT | 441 N Hanover Street | Hyd | 051 | 4 | 2 | 0 | 2580 |
| 11 | 10149167 | \$179,900 | 9 | SF | ACT | 633 N HANOVER STREET | Hyd | 051 | 5 | 2 | 0 | 2086 |
| 12 | 10141511 | \$178,500 | 9 | SF | ACT | 924 Hoffer Street | Cen | 251 | 4 | 2 | 0 | 1351 |
| 13 | 10149766 | \$184,900 | 9 | SF | ACT | 5734 Kenwood Ave | Met | 227 | 4 | 2 | 1 | 1188 |
| 14 | 10150269 | \$185,000 | 9 | SF | ACT | 1003 MAIN ST | Met | 407 | 5 | 2 | 2 | 2210 |
| 15 | 10148899 | \$189,900 | 1 | SF | ACT | 1113 W MAIN STREET | Cen | 268 | 4 | 2 | 0 | 1932 |
| 16 | 10150231 | \$197,000 | 9 | SF | ACT | 5824 Mayfair Drive | Met | 227 | 4 | 2 | 1 | 1586 |
| 17 | 10150267 | \$179,900 | 9 | SF | ACT | 5507 Old Locust Lane | Met | 227 | 4 | 2 | 0 | 1120 |
| 18 | 10144676 | \$184,900 | 8 | AT | ACT | 31 Pine Street | Hyd | 385 | 4 | 2 | 2 | 2400 |
| 19 | 10144679 | \$184,900 | 8 | AT | ACT | 41 Pine Street | Hyd | 385 | 4 | 2 | 2 | 2400 |
| 20 | 10144680 | \$184,900 | 8 | AT | ACT | 45 Pine Street | Hyd | 385 | 4 | 2 | 2 | 2400 |
| 21 | 10144682 | \$184,900 | 8 | AT | ACT | 55 Pine Street | Hyd | 385 | 4 | 2 | 2 | 2400 |

Available Reports: Email Listing(s) OK Cancel

Step 1: Select Listing(s)

- Selected (10)
- All Listings (29)
- Current Listing (#10144676)

Step 2: Select E-mail Type

- Hyperlink
- Attachment
- Insert Into Body

Step 3: Select Listing Report

NOTE: The report you are viewing isn't allowed to be e-mailed. Please choose another report from below.
Choose Report:
Client Detail

Saved Searches # Days Back: 1 Go Assign Add New Delete

| | E-mail Notify | Voice Alerts | Name | Matches | New | Changed | Quick Actions |
|--------------------------|---------------|--------------|-----------------------------------|---------|-----|---------|---------------|
| <input type="checkbox"/> | Off | Off | Saved Search for Rodgers, Craig S | 29 | 29 | 0 | -- Select -- |

Saved Searches

E-mail Notify Voi

Off