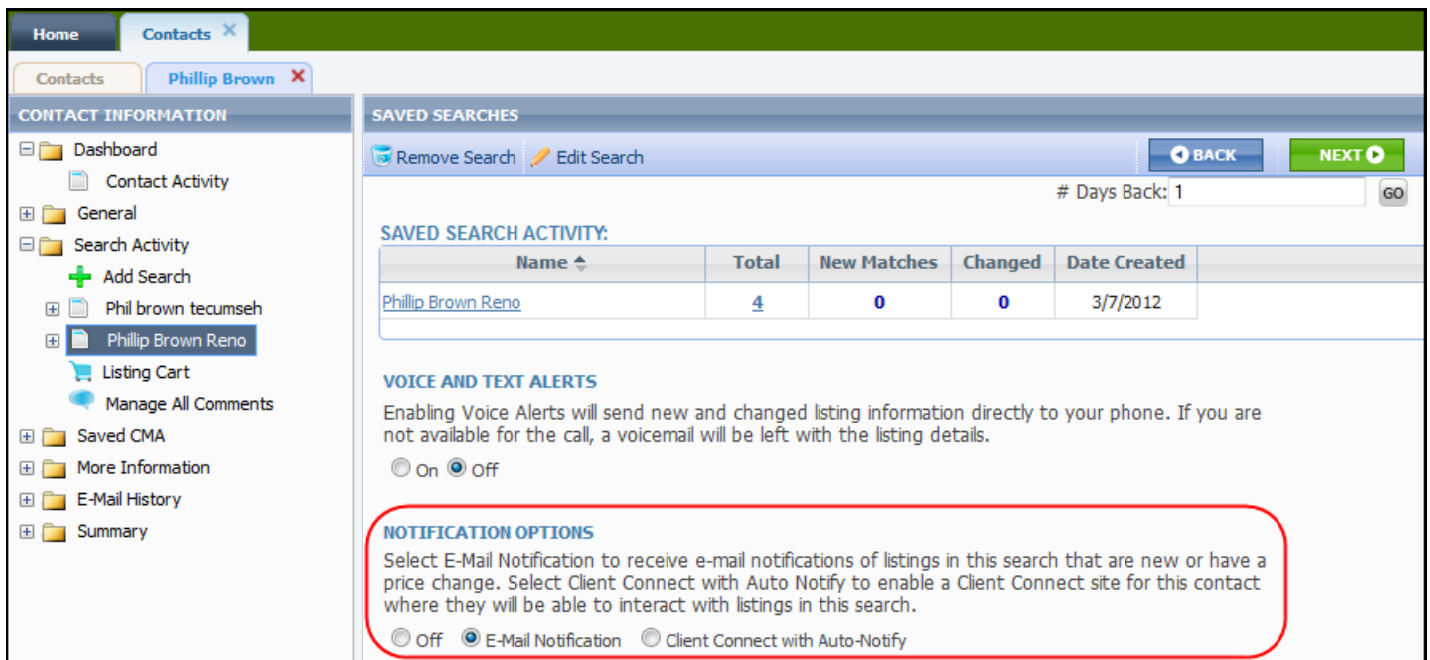


Automatic E-mail Recurrence

Whether you are sending Automatic E-mail Notifications or Client Connect Automatic E-mail notifications, you have the ability to be very specific when your notification E-mails based on listing activities are sent out of Paragon when using the Recurrence functionality. Each client has unique time needs for listing activity data. Recurrence functionality enables you to select the specific days when Automatic E-mails are sent and the interval between subsequent E-mails. Recurrence is a very dynamic tool, which is described below.

For this Quick Start Guide, we will start at the point where you are selecting when an E-mail is sent to your client. The following Recurrence functionality is available for both E-mail Notifications and Client Connect Automatic E-mail notifications.



The screenshot shows the Paragon software interface for a contact named Phillip Brown. The 'CONTACT INFORMATION' sidebar is on the left. The main area shows 'SAVED SEARCHES' with a table of search activity. Below that, the 'VOICE AND TEXT ALERTS' section has 'Off' selected. The 'NOTIFICATION OPTIONS' section is highlighted with a red circle and contains the following text:

NOTIFICATION OPTIONS
 Select E-Mail Notification to receive e-mail notifications of listings in this search that are new or have a price change. Select Client Connect with Auto Notify to enable a Client Connect site for this contact where they will be able to interact with listings in this search.

Off E-Mail Notification Client Connect with Auto-Notify

Auto E-mail Notification and Client Connect Notification (after clicking Notification Settings)

Auto Notification

Subject: Real Estate Listing Notification For Phillip Brown
 Result View: Custom Brochure 1
 Date Range: Begin 01/18/2013 End 01/18/2014
 Notify: Immediately Recurring [Modify Time Frame](#)
[Insert Standard Message Body](#)

Client Connect Notification

NOTIFICATION DATE RANGE:
 Begin 01/18/2013 End 01/18/2014
CLIENT SCHEDULING:
 Immediately Recurring [Modify Time Frame](#)

Notification Range setting

All recurrence E-mails have a maximum Notification Range of 12-months.

While your notification is running, you can extend the Notification Range up to 1-year from the date that you modify the Notification Range.



To extend the length of your notification, click on the calendar tool.

Using the right arrow, you can select a date up to 12 months from the date of Notification Range change.

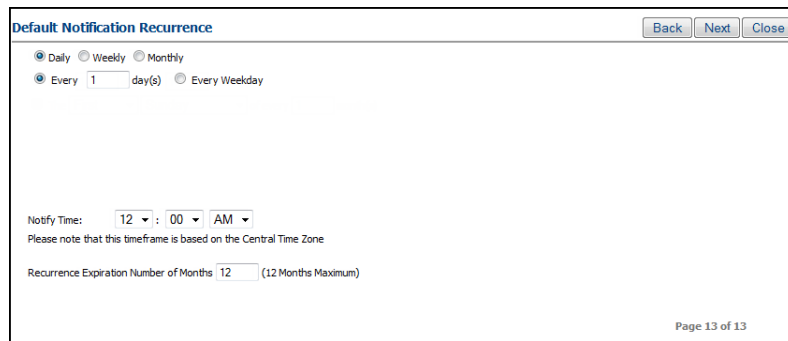
Clicking on the day of the month will select the date and close the tool.



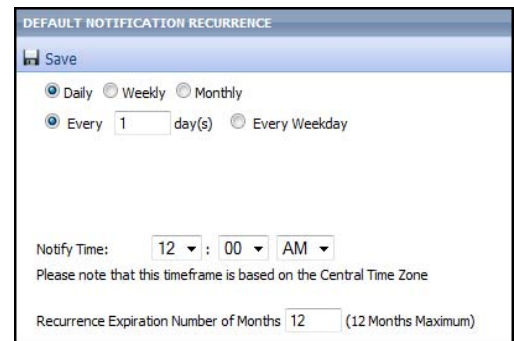
Default Notification Recurrence settings

You can set your default Notification Recurrence in 2 places in Preferences.

1. Preferences Wizard – Page 13



2. Preferences → E-mail → Default Notification Recurrence



Auto Notification Expiration Alert

Prior to the expiration of your E-mail notification, Paragon will alter you.

Daily Recurrence Settings

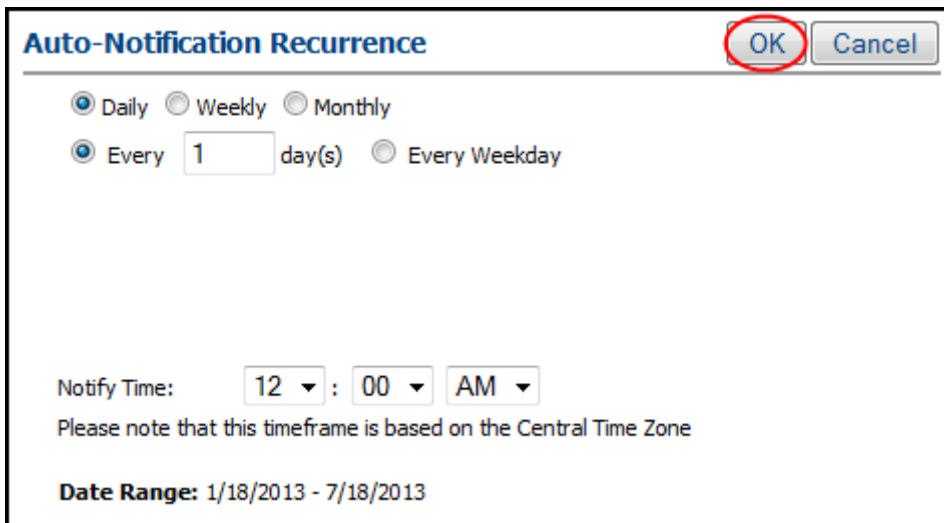
Every ____ day(s) you to set the number of days between notifications (Max value = 255)

I.E. If you enter “3” in the box, then 3 days will pass between notifications. If the notification is setup on Monday, the first recurrence E-mail will be sent on Thursday. The next E-mail will be sent on Sunday.

Weekday will send notifications Monday – Friday but not Saturday or Sunday.


Note: All recurrence E-mails have a 6-month expiration unless you choose up to the maximum of 12 months. (See the top of page 2 for details on changing the Notification Range.)

Notify Time allows you to set a time, based on **Central Time Zone** (location of Paragon’s servers), when the notification will be sent. The default setting is midnight.



The screenshot shows a dialog box titled "Auto-Notification Recurrence". At the top right are "OK" and "Cancel" buttons, with "OK" circled in red. Below the title bar are three radio buttons: "Daily" (selected), "Weekly", and "Monthly". Underneath is another set of radio buttons: "Every" (selected), followed by a text input field containing "1" and the label "day(s)", and "Every Weekday". At the bottom, there is a "Notify Time" section with three dropdown menus showing "12", "00", and "AM". Below this is the text "Please note that this timeframe is based on the Central Time Zone". At the very bottom, it says "Date Range: 1/18/2013 - 7/18/2013".

When you have finished your settings for this specific notification, click **OK** to save your settings.



The screenshot shows a dialog box titled "E-Mail Notification Options". At the top right are "OK" and "Cancel" buttons, with "OK" circled in red. Below the title bar is a tab labeled "Auto Notification", which is also circled in red. On the left side, there are two icons: "Address Book" and "Select Signature".



The screenshot shows a dialog box titled "Advanced E-Mail Options". At the top right are "OK" and "Cancel" buttons, with "OK" circled in red. Below the title bar is a tab labeled "Client Connect Notification", which is also circled in red. Underneath is a section titled "CLIENT E-MAIL OPTIONS" with the text "Use Default Auto-Notification Email:" followed by two radio buttons: "Default" (selected) and "Custom". Below this is a small explanatory text: "(Default) Use your default auto-notification E-Mail that was setup in User Preferences. (Custom) Create a new notification E-Mail for this client."

Weekly Recurrence Settings

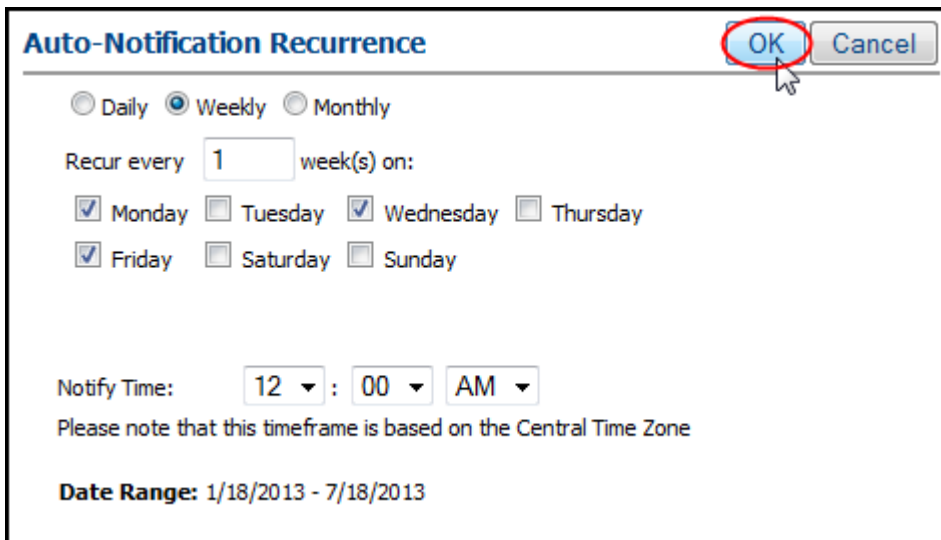
Recur every ____ week(s) on will set the number of weeks between notifications. (Max value = 255)

I.E. If you enter “3” in the box, then 3 weeks will pass between notifications.

Note: All recurrence E-mails have a 6-month expiration unless you choose up to the maximum of 12 months. (See the top of page 2 for details on changing the Notification Range.)

Select the day(s) of the week for the recurrence. Check the checkbox for the days of the week you want to send notifications. You can select any combination of the 7 days of the week.

Notify Time allows you to set a time, based on **Central Time Zone** (location of Paragon’s servers), when the notification will be sent. The default setting is midnight.



Auto-Notification Recurrence OK Cancel

Daily Weekly Monthly

Recur every week(s) on:


Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Notify Time: :

Please note that this timeframe is based on the Central Time Zone

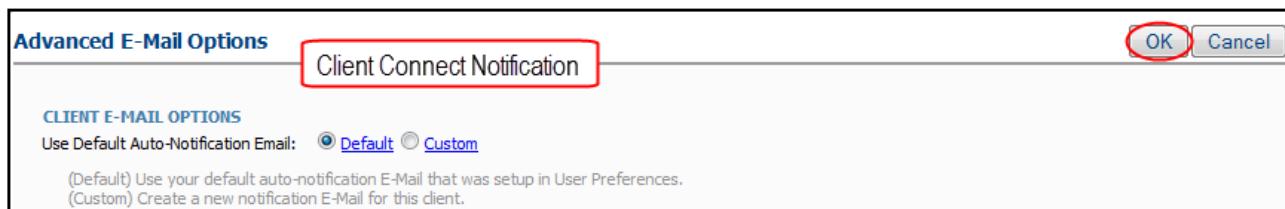
Date Range: 1/18/2013 - 7/18/2013

When you have finished your settings for this specific notification, click **OK** to save your settings.



E-Mail Notification Options Auto Notification OK Cancel

[Address Book](#) [Select Signature](#)



Advanced E-Mail Options Client Connect Notification OK Cancel

CLIENT E-MAIL OPTIONS

Use Default Auto-Notification Email: Default Custom

(Default) Use your default auto-notification E-Mail that was setup in User Preferences.
(Custom) Create a new notification E-Mail for this client.

Monthly Recurrence Settings

First recurrence option:

Day ____ of every ____ Month(s) on: enables you to select the numbered day of the month and set the number of months between E-mail notifications. (Max value = 255)

If you enter “4” in the Day box, the notification will go out the fourth of the month.

If you enter “2” in the every month box, your notifications will go out every other month.

Note: All recurrence E-mails have a 6-month expiration unless you choose up to the maximum of 12 months. (See the top of page 2 for details on changing the Notification Range.)

Second recurrence option:

The **(week of the month) (day of the month)** of every ____ **Month(s)** allows you to select the week of the month, day(s) of the month and the number of months between notifications. (Max value = 255)

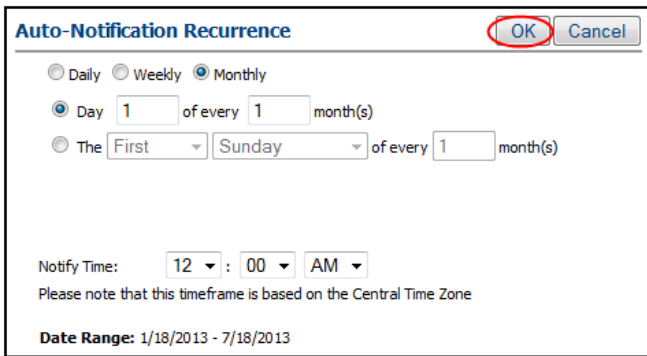
Select which week of the month your notification is sent.

Select which day or days-of-the-week your notification is sent.

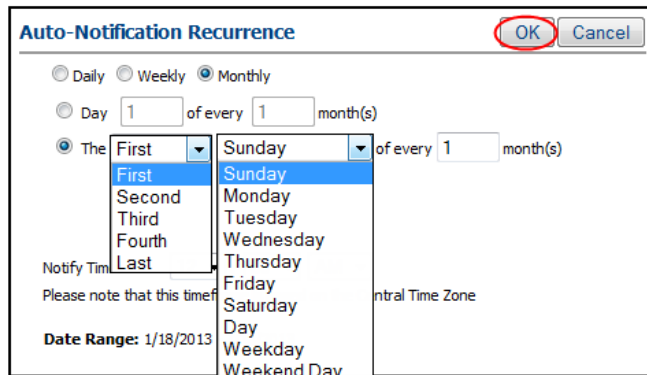
Enter the number of months between notifications.

Notify Time allows you to set a time, based on **Central Time Zone** (location of Paragon’s servers), when the notification will be sent. The default setting is midnight.

First recurrence option



Second recurrence option



When you have finished your settings for this specific notification, click **OK** to save your settings.