

Client Connect – Agent Functionality

Client Connect is a powerful tool. Based on Saved Searches and the client's Listing Cart that have been setup for Automatic E-mail Notification using Client Connect, listings are sent to Client Connect and updated when there are new matches and changes to listings already sent to Client Connect.

Clients can view listings for more than 30-days, as long as the listings are active and available for purchase. Clients can classify listings as a Favorite, Possible and Reject. Clients can also add comments to listings that are only visible to the client and the agent. You can reply to your clients.

Client Connect allows you to manage listings sent to Client Connect on behalf of your clients.

This Quick Start Guide focuses on the functionality available to agents using Client Connect.

Agents, using Client Connect, have the following functionality available to them:

- Logging into Client Connect as yourself to classify listings and add agent comments to listings
- Accessing Client Connect as a client, classifying listings and add agent comments to listings
- Once in Client Connect as a client, you can quickly move between client accounts

Logging in as the Agent

When you are on your Client Connect Home Page, you can enter your login credentials to access your Client Connect to manage your clients' listing inside Client Connect.



The screenshot shows a login form with a blue header labeled "LOGIN". Below the header are two input fields: "USERNAME*" with the placeholder text "Your E-mail Address" and "PASSWORD*" with the placeholder text "Your Password". Below the password field is a "Remember Me?" checkbox. At the bottom left is a "Login" button, and at the bottom right is a link labeled "FORGOT PASSWORD?".

Username: is the E-mail address inside your Paragon Agent Record. Normally, this is your business E-mail address.

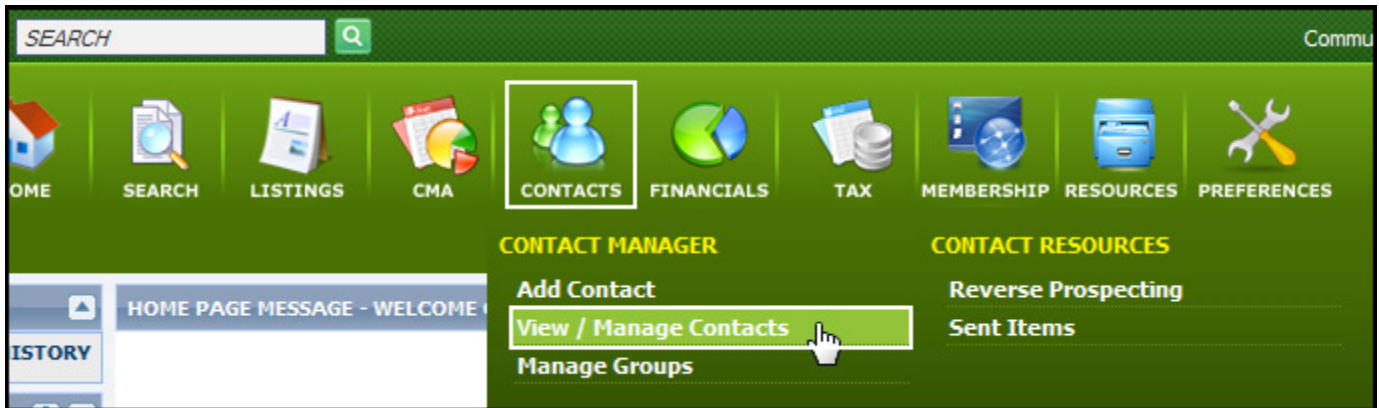
Password: is created by you and it does not have to be your password to login to Paragon.

If you forget your Client Connect password, click **Forgot Password** and enter your Paragon Agent Record E-mail address. You will receive an E-mail with instructions on resetting your password.



Accessing Client Connect from Contact Manager

To access your clients' Client Connect listings, click **Contacts** and click **View / Manage Contacts**.



Find the client whose listings you want to manage and click the plus sign next to their name. Once the client's Saved Searches and Listing Cart are displayed, click on a search's name or the Listing Cart.

	<input type="checkbox"/>	Activity	Name	Status	Email	Primary Phone	Matches	New	Changed	Undecided	Favorites	Possible	Rd
1	<input checked="" type="checkbox"/>	+	Abernathy, Tanner	Active			36	1	25	4	3	14	
2	<input type="checkbox"/>	+	Able, Greg	Active			20	4	11	18	0	0	
3	<input type="checkbox"/>	+	Acosta, Ted	Active			11	0	5	9	2	0	
4	<input type="checkbox"/>	+	Adams, Ron	Active			7	1	4				
5	<input type="checkbox"/>	-	Adams, Samuel	Active		(913) 693-0000	8	0	4	3	2	0	
	<input type="checkbox"/>	Search Name				Matches	New	Changed	Undecided	Favorites	Possible	Rejected	Last Notified
	<input type="checkbox"/>	Samuel Adams				5	0	4	3	2	0	0	6/10/2013
	<input type="checkbox"/>	Listing Cart				3	0	0	1	1	1	0	

Paragon displays the setup tool for that automatic E-mail notification. (See next page)

At the bottom of the page, you will see a container with title Site Information. Inside that container is a button labeled View Site. When you click **View Site**, you are logged into Client Connect for that client, ready to manage your client's listings.

SAVED SEARCHES

Remove Search | Edit Search

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

CLIENT CONNECT

List Name	Undecided	Favorites	Possible	Rejected
Samuel Adams	3	2	0	0

SITE CONFIGURATION

Send Notification To Client: On Off

[Notification Settings](#)

[Client Connect Preferences](#)

SETUP COMPLETE

Once your setup is complete, click the Send Link button below to send the client connect link to your contact.

[SEND LINK](#)

SITE INFORMATION

Take a look and see what your Client Connect site looks like.

[VIEW SITE](#)

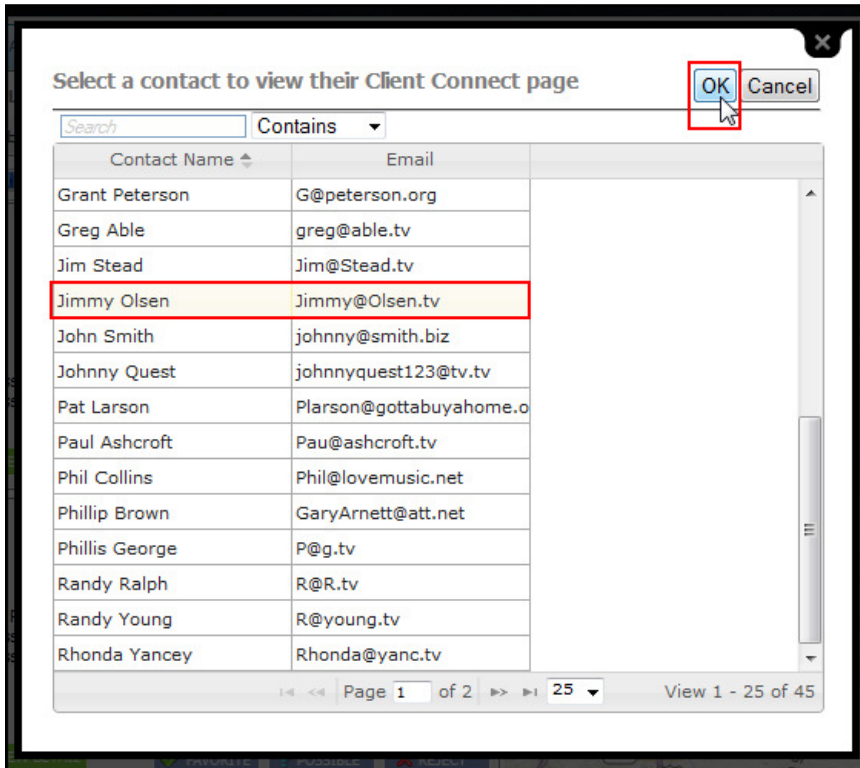
Quickly Move Between Client Accounts

The screenshot shows the top navigation bar with 'HOME', 'YOUR LISTINGS', and 'CONTACT ME'. Below this is a 'SELECT CONTACT' dropdown menu with 'Samuel Adams' selected. A 'SELECT SOURCE' dropdown menu is also open, showing options: '-- ALL --', '-- ALL --', 'Listing Cart', and 'Samuel Adams'. The 'Listing Cart' and 'Samuel Adams' options are highlighted. Below the dropdowns are tabs for 'NEW New / Undecided', 'Favorites', 'Possible', and 'Rejected'. At the bottom, there are view options: 'Horizontal View', 'Vertical View', and 'Detail View'. The MLS # 435867 and 'NEW MATCH' are also visible.

When you have completed work for one client, click on that client's name.

A modal will open showing all of your clients with Active Client Connect webpages. (See next page)

Find the new client whose listings you wish to manage and click on that client’s row to select them. Then click on **OK** to open the new client’s Client Connect webpage.



When you are finished maintaining your clients’ listings, click the **Home** button to go to your Client Connect Home Page. Click the **Log Off** button to end your Client Connect session.

