# 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.

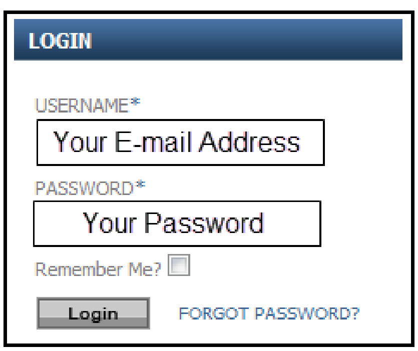
Client Connect allows you to manage listings sent to Client Connect on behalf of your clients.
**This Quick Start Guide focuses on the functionality available to agents using Client Connect.**

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

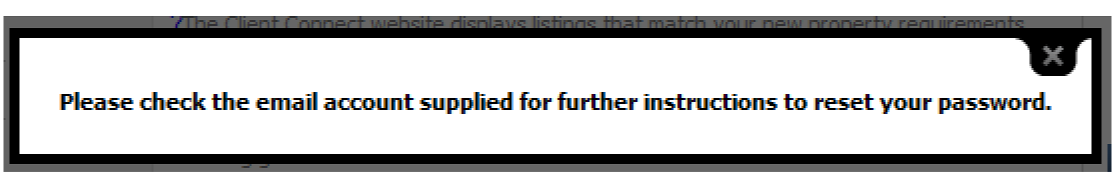
When you are on your Client Connect Home Page, you can enter your login credentials to access your Client Connect to manage your clients' listing inside Client Connect.




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

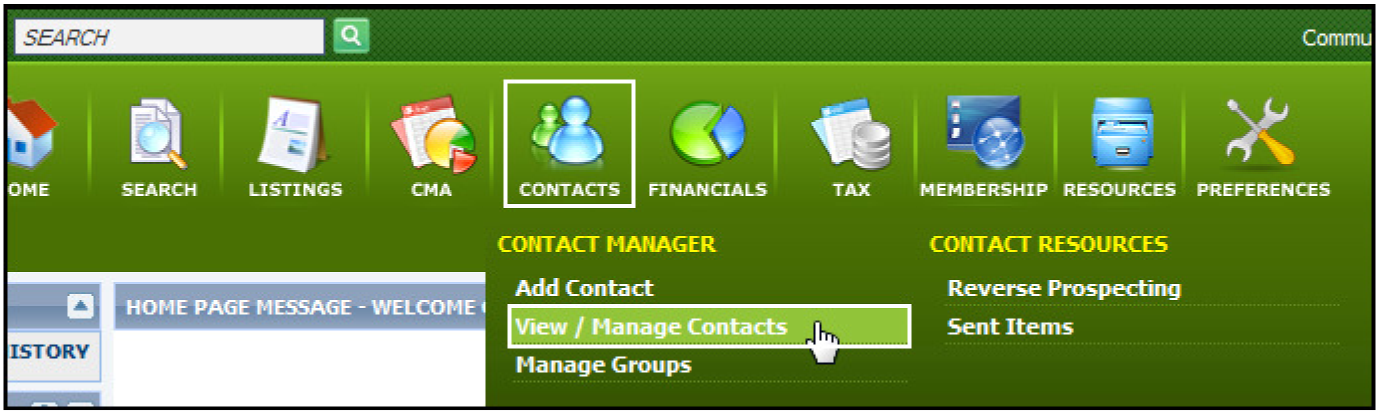
**Password:** is created by you and it does not have to be your password to login to Paragon.

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**.



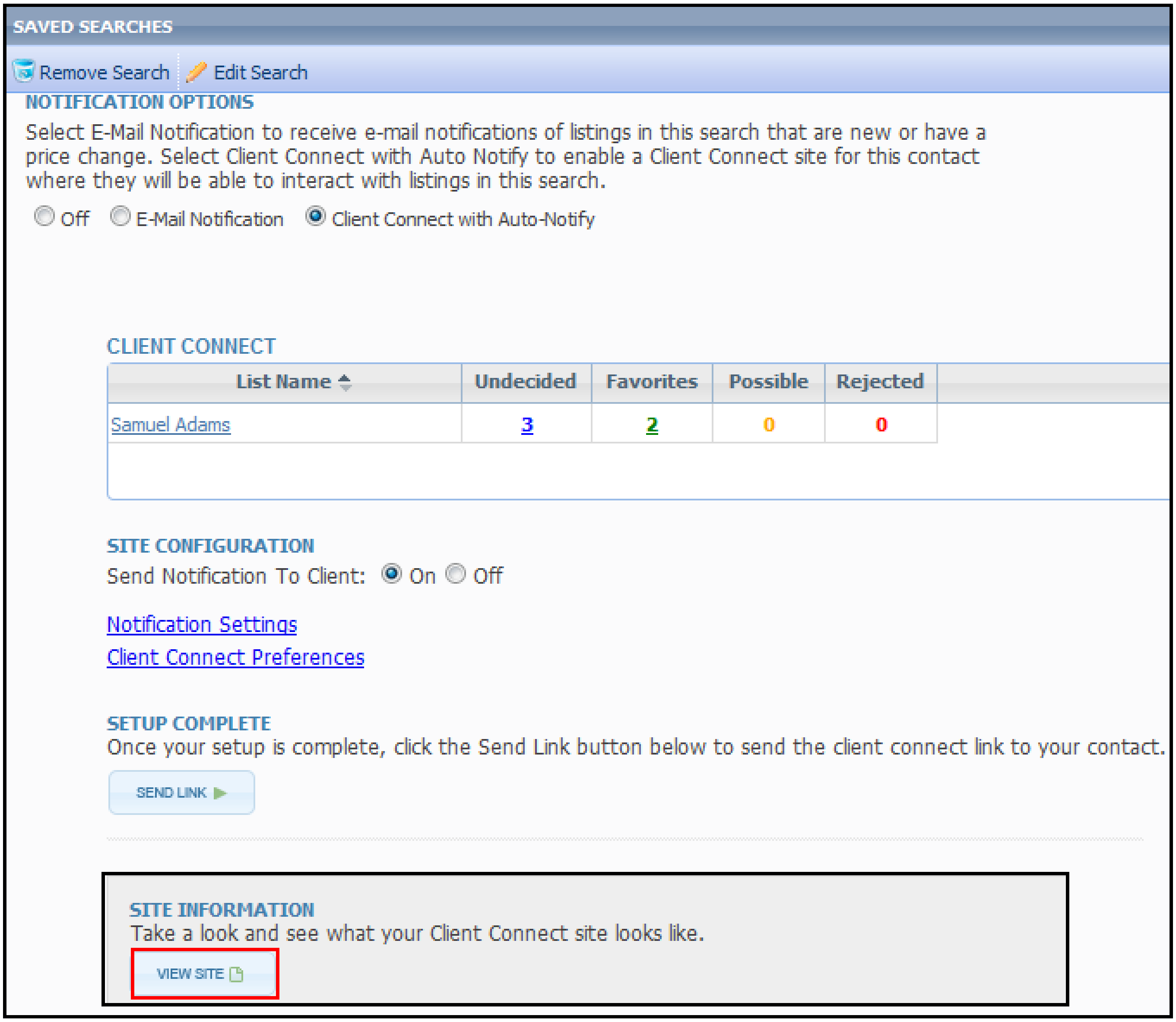

Find the client whose listings you want to manage and click the plus sign next to their name. Once the client's Saved Searches and Listing Cart are displayed, click on a search's name or the Listing Cart.

| | | | Activity | Name | Status | Email | Primary Phone | Matches | New | Changed | Undecided | Favorites | Possible | Re |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | ☑ | + | | Abernathy, Tanner | Active | | | 36 | 1 | 25 | 4 | 3 | 14 | |
| 2 | ☐ | + | | Able, Greg | Active | | | 20 | 4 | 11 | 18 | 0 | 0 | |
| 3 | ☐ | + | | Acosta, Ted | Active | | | 11 | 0 | 5 | 9 | 2 | 0 | |
| 4 | ☐ | + | | Adams, Ron | Active | | | 7 | 1 | 4 | | | | |
| 5 | ☐ | − | | Adams, Samuel | Active | | (913) 693-0000 | 8 | 0 | 4 | 3 | 2 | 0 | |

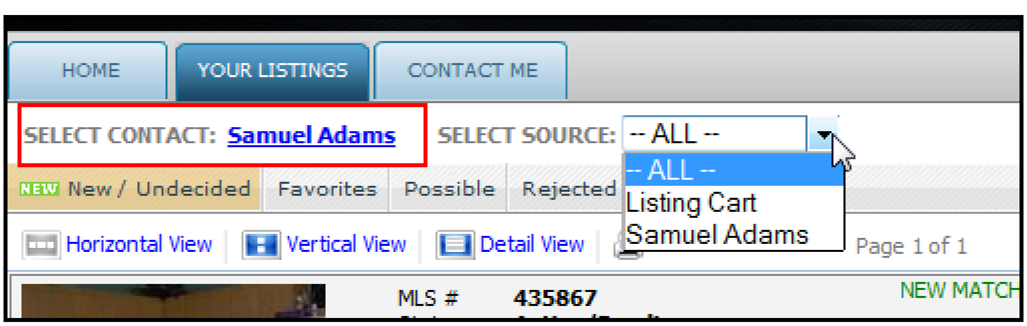
| | Search Name | Matches | New | Changed | Undecided | Favorites | Possible | Rejected | Last Notified |
|---|---|---|---|---|---|---|---|---|---|
| ☐ | Samuel Adams | 5 | 0 | 4 | 3 | 2 | 0 | 0 | 6/10/2013 |
| ☐ | Listing Cart | 3 | 0 | 0 | 1 | 1 | 1 | 0 | |

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.



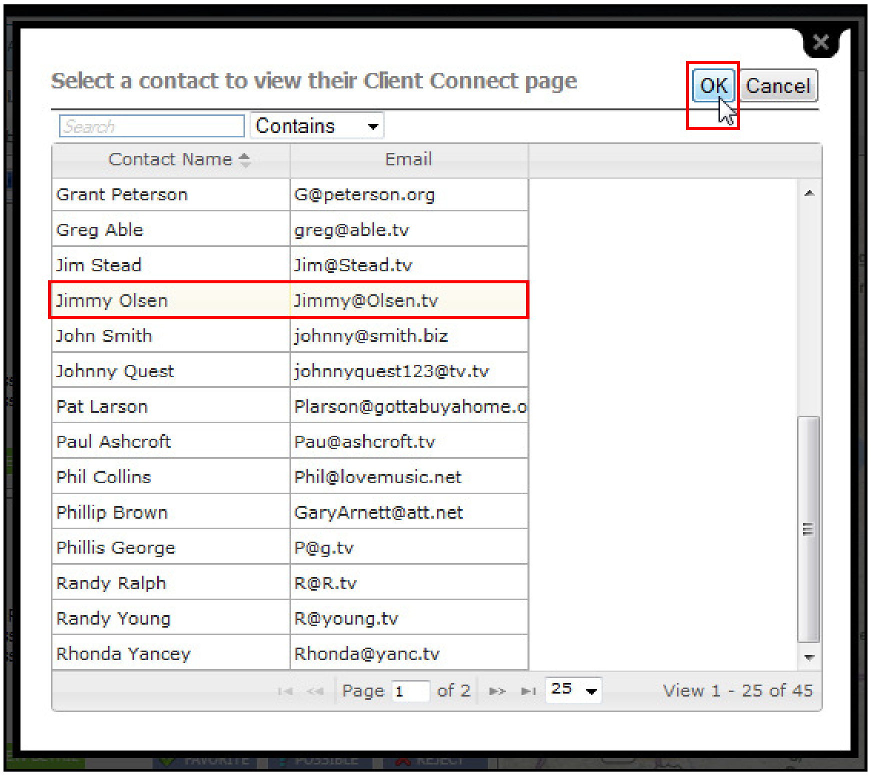

## Quickly Move Between Client Accounts




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.