## Rich Text Editor for Custom and Agent Views

The rich text editor allows you to copy/customize or create custom/agent reports in Paragon. This Quick Start Guide will demonstrate the rich text editor's report functionality by copying an existing report and customizing it for Client Connect.

To begin the copy and customize a report process, click **Preferences** and under **Agent Views**, click **My Client Connect Views**.
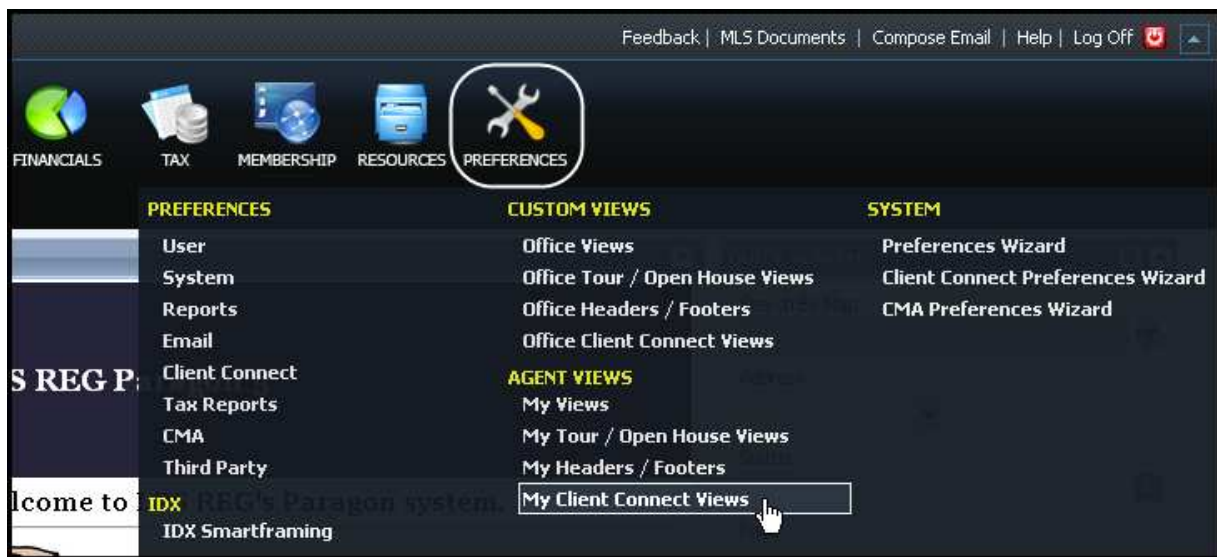
A new screen will open. This screen displays any reports you have created in My Client Connect Views. Click **Copy View** to find the report you want to copy and customize.
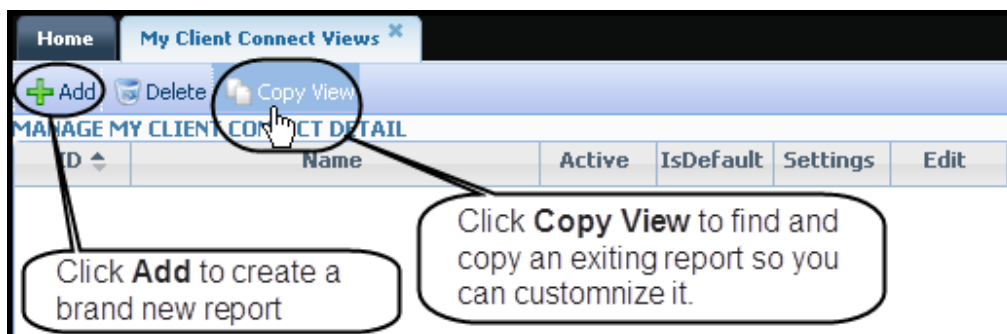
The screen will refresh. In the dropdown box, click the arrow to display the location of the report you want to copy and click that location (My Views, Office or MLS). The screen will refresh again showing the reports in the selected location. Click **Copy** on the right side of the line of the desired report.
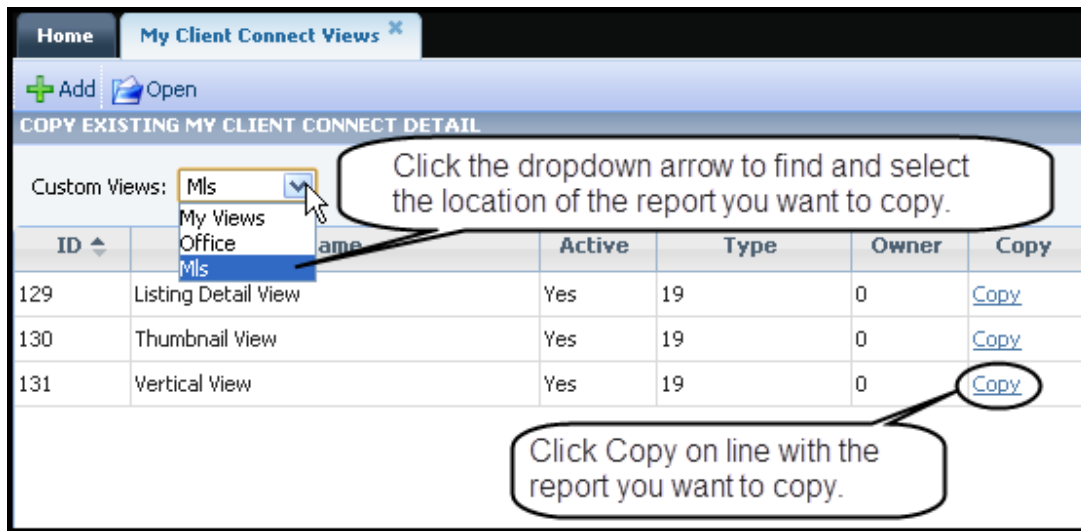
A new screen will display. You need to make selections in several areas on this page. Click **Save** when you have completed your selections.

- *Activate This View* to make this report usable when the design is complete
- *MLS Client Connect Detail Name* - rename your report so it is easy to identify from the other reports

- *Client Connect Type* – where the report is saved and used in Client Connect
- *Select Classes To Copy* – choose the property classes in which you will use this report

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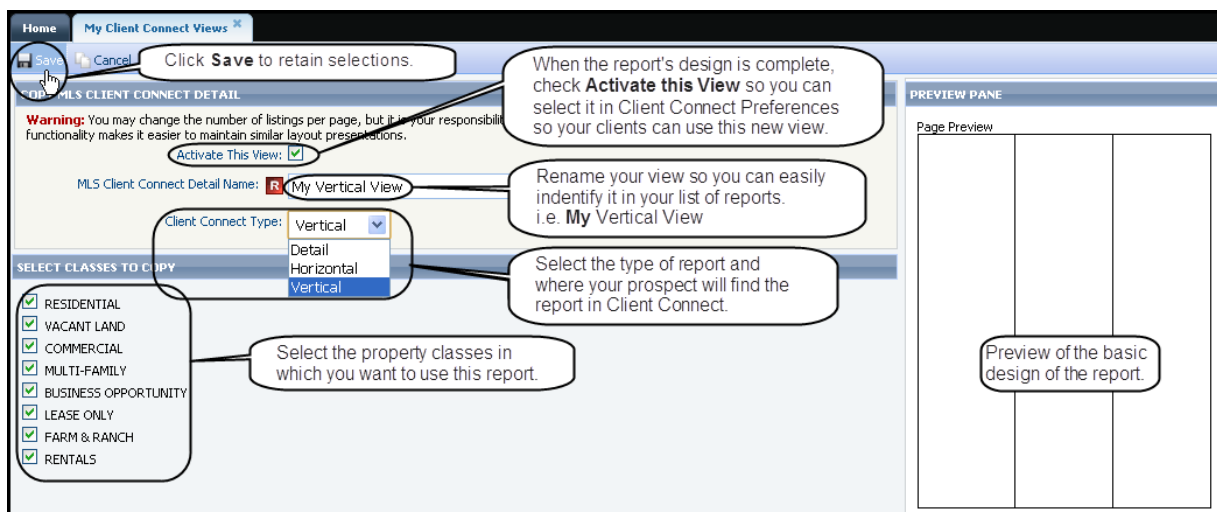
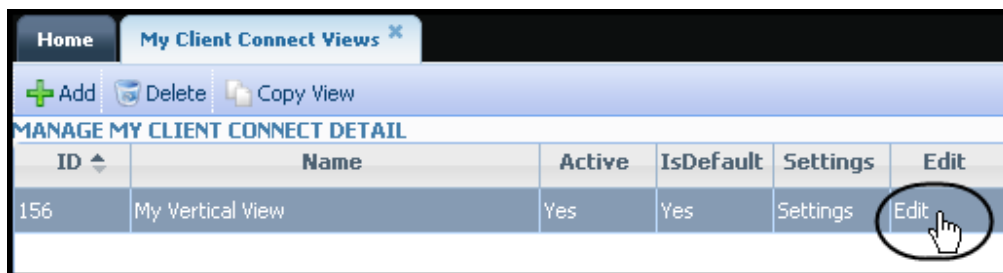The screen will change displaying the available reports.

To edit the report elements, click either the **report's name** or **Edit**. Report elements include field labels and data, field preference boxes, quick links (M, H, D, I, N, etc.), maps, checkbox, text box, font size, color and bolding, borders, images (agent, office, listing and special images), etc.

Click **Settings** to change the report's name or toggle the status of the report between active and inactive.
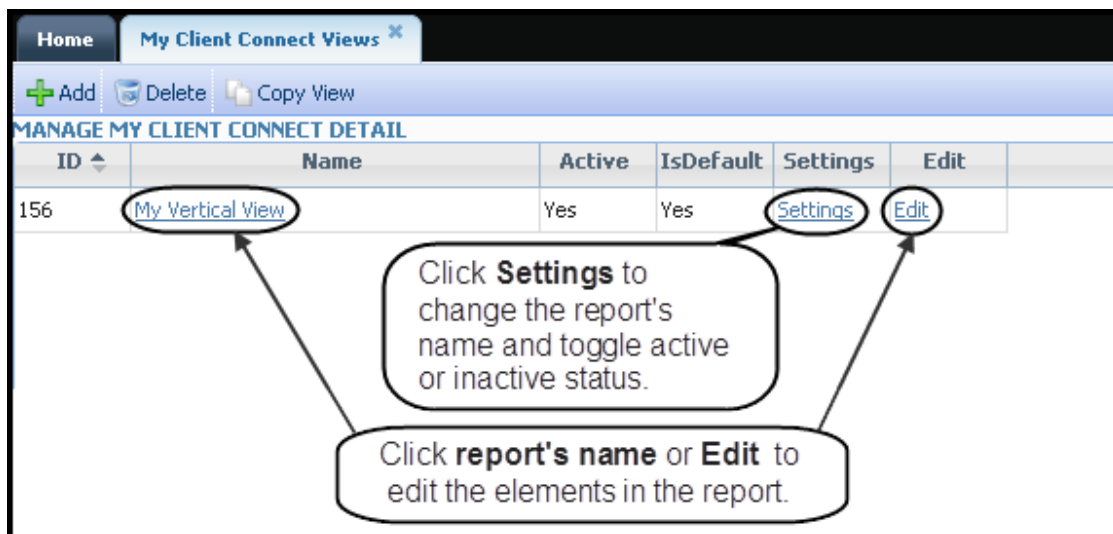
The following shows how to edit the report elements using the rich text editor.

Click **Edit** to enter the edit mode in the rich text editor.

The screen will change displaying the following. The following pages will point out the design tools found at the top and left side of the design page.

Below is the Design Page with callouts identifying different design elements in this report.

Below are the design elements found on the left side of the Design Page.

Design Elements
Fields, Features, Misc Report Elements and Grid/Default Font & Style

Fields

Text and Data ▾
Text
Data
Text and Data
Half Baths (24)
Acreage (53)
Address (14)
Address 2 (15)
Agent - Address 1 (28)
Agent - Address 2 (28)
Agent - Agent Name (28)

Field Information
Insert just the:
* Field Label (text)
* Field Data
* Field Label and Data

Misc Report Elements
* Agent/Office Images
* Listing Photos
  Listing Image
  Thumbnail Image
* Maps (Bing & Listing)
* Box to separate elements
* Text Box for agent text
* Field Preference Section
  Double click to add MLS
  data (Fields or Features)
* Checkbox - select listings
* Page Number
* Date or Date and Time
* and more

Misc. Report Elements

Agent Image
Bing Map
Box
CC Comment Link
CC Favorite Link
CC Map Icon
CC Possible Link
CC Reject Link
Checkbox
Custom Image
Date/Time
Disclaimer
Field Prefs Section
Listing Image
Listing Map
Office Image
Page Number
Search Criteria
Text
Thumbnail

Features

Text ▾
Text
Data
Text and Data
(A02) Attached
(A03) Detached
(A04) Under
(A05) Both Att & Det
(A06) Tandem
(A07) Carport
(A08) Designated Parking
(A09) Common
(B00) HOA AMENITIES
(B01) No Amenities
(B02) Add'l Parking
(B03) Adult Living Certfd 55+
(B04) Air Strip Access

Features
* **Insert Feature Categories** displays all values for the category.
  i.e. HOA Amenities
* **Insert Feature** displays a specific value in a Feature Category.
  i.e. Add'l Parking or Adult Living Certfd 55+

You can add just the Label, the Data or Label and Data

Grid/Default Font & Style

SNAP TO GRID OPTIONS
☑ Snap to Grid
X: 10
Y: 16

TEXT FONT
Tahoma ▾
11px ▾
B *I* U ... ✂ ≡
■

DATA FONT
Tahoma ▾
11px ▾
B *I* U ... ✂ ≡
■

See page 8 for more details on Grid/Default Font & Style.

Grid/Default Font & Style
* Enable/Disable Snap to Grid - Easy alignment of elements
* Set snap to grid size x:___ and y:___
* Text Font - Choose the font for text and state
* Set Font Size - 8 pixels to 36 pixels using drop down box
* Set Font Color by clicking on the color box (default black)
* Set Font Style (Bold, Italics, Underline, Ellipsis, Crop and Line wrap)

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Below are the design elements found at the top of the Design Page.

Design Elements at the top of the Design Page
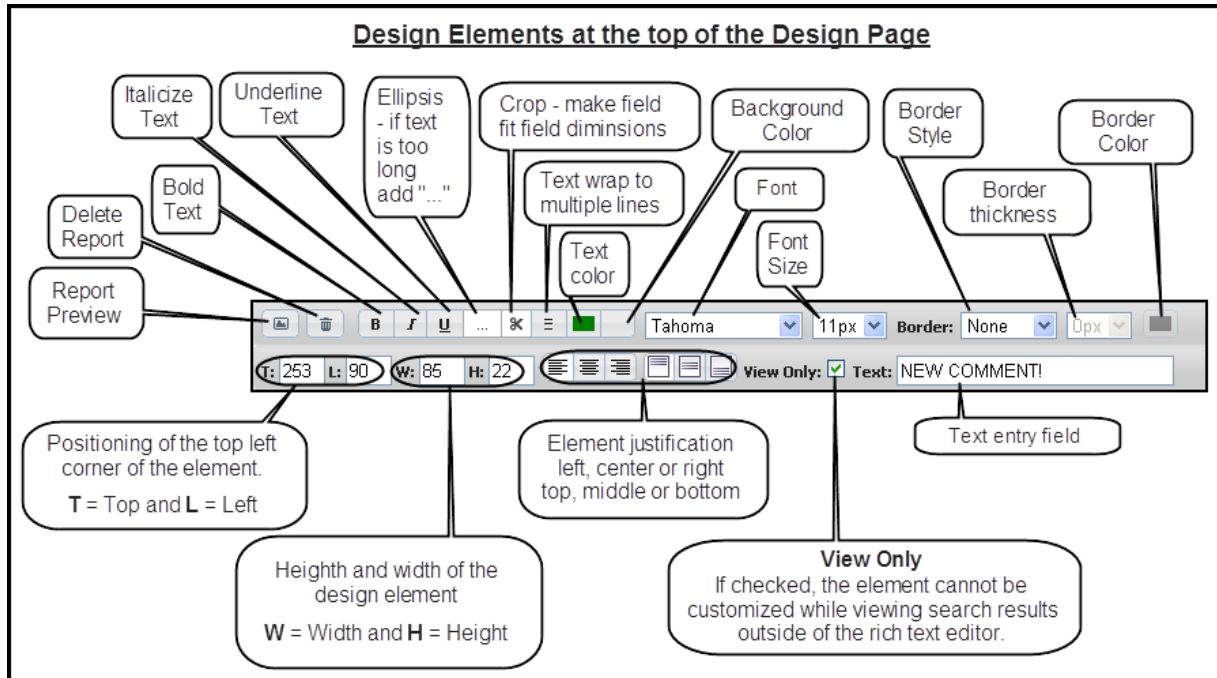
Below are the tools available in the Preview Mode.

Return to Design mode closes the report preview and returns to the design mode.
MLS# - Paragon selects a random MLS # for each class to preview your report design.
If you want to use a specific listing for your report preview, enter the MLS #.

**Tips and Tricks for using the Design Elements in the Rich Text Editor**

Save your work inside the Rich Text Editor. Paragon does not automatically save your work.

Note: When designing a report with multiple properties displayed on one (1) page, Paragon will have you create one template that is used for the other properties displayed on the page.

Adding Design Elements to your Report

The rich text editor's design elements are added to your reports through the "drag and drop" method. Left click on the design element found in the left side of the Design Page and drag it to its location on the report. Release your mouse button to place the element on the report.

For Fields and Features, use the dropdown box at the top of the container and select what you want to add to your report: just labels, data or both labels and data.
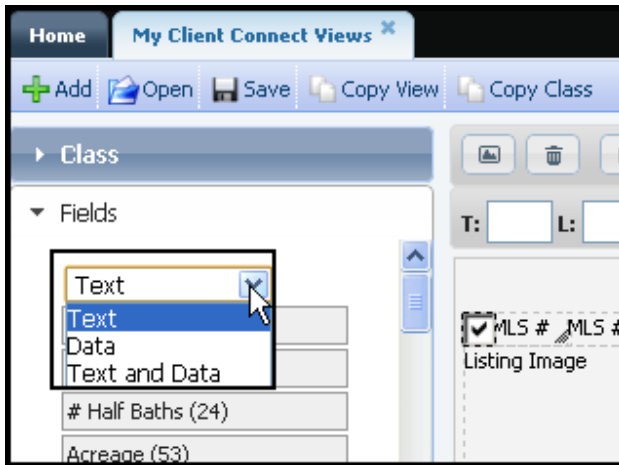
Justifying fields to a common vertical or horizontal position

If you want to justify a group of fields to a specific vertical point or horizontal point, hold down your control key and click on the fields you want to move. You can also move fields by using the **T** (top) or **L (**left) fields, enter the position value and move into another design field i.e. **W** or **H**. Upon your moving into another field, the selected fields will move to the entered location.
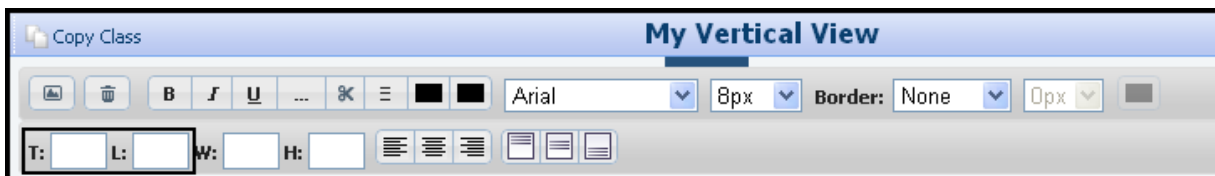
Setting a Default Report Style

You can set a default style for your report. Using the Misc. Report Elements design container, select the styles you want for this report. See Style element explanations below.
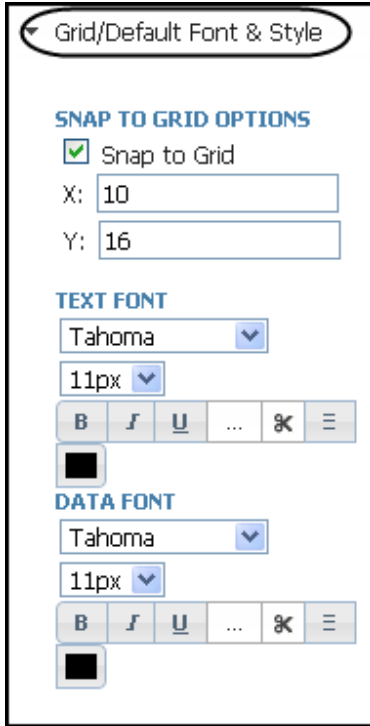
Snap To Grid: You can set values less than or greater than the Paragon defaults. Using the **X:** and **Y:** fields enter different values. Snap To Grid is a function where Paragon will move your elements to the nearest point for the top left corner of the element.

Text and Data Font: for text, including labels for data, and listing data, you can set a style for each, independent of the other. The style can include: **font**, **font size, font color, font emphasis** (bold, italics and underline), **ellipsis** (when the text is longer than the allowed space add "…" indicating more than can be displayed), **crop** (force the design element to be the sized defined in the W (width) and H (height)) and **Multi-Line** (text wrap for fields with content longer that what can be displayed on one (1) line where the field has a height (**H**) that will allow multiple lines.
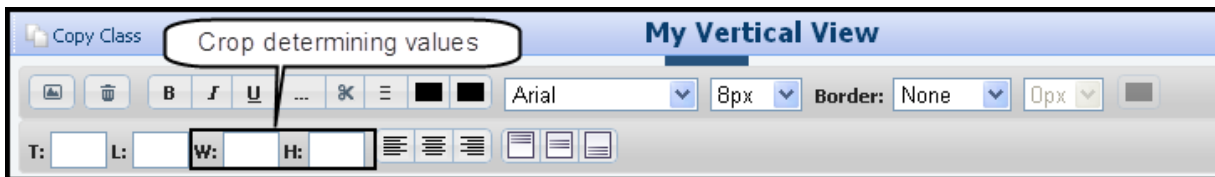
Design Element Justification

The Rich Text Editor allows you to justify your design elements in two (2) dimensions.
Horizontal: left, center or right justified
Vertical: top, middle or bottom

Note: centering listing, agent and office images generates a balanced look on reports.

Thumbnail Image

The thumbnail image is **fixed** in size (115 x 98). Resizing the placeholder does not change the picture size used inside your reports. If you want to change the size of a listing image, (i.e. Large Photo Brochure) use the design element "Listing Image".

Listing Image

The Listing Image size can be changed. When added to a report, the Listing Image is 150 x 115. If you want to make the Listing Image larger or small, make sure the images have the same height vs. width ratio. I.E. 560 x 430 or 100 x 77

Map sizes

Maps can be any size without maintaining a height/width ratio.

Color Selection

Colors can be used for text, background and borders. Click on the color-picking tool to select your desired colors. You can also enter RGB and Hex color-codes for exact color matching.
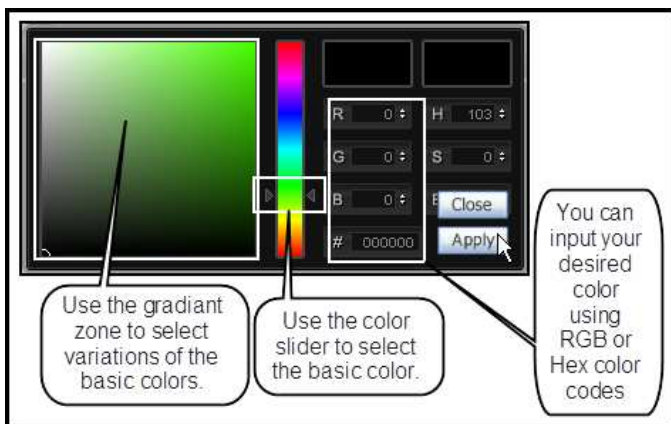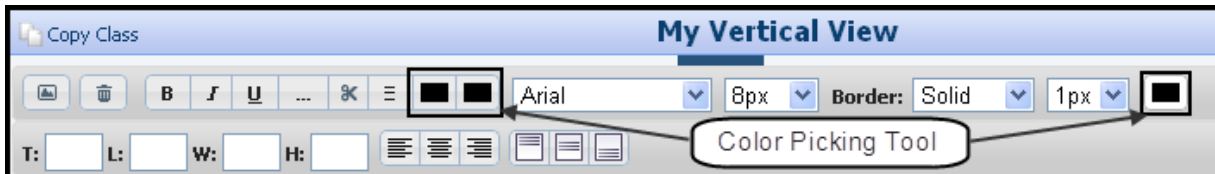
Note:
If you use the color-picking tool to select a color (i.e. background color), note the hex or RGB code so you can use that exact color for other backgrounds on the report.