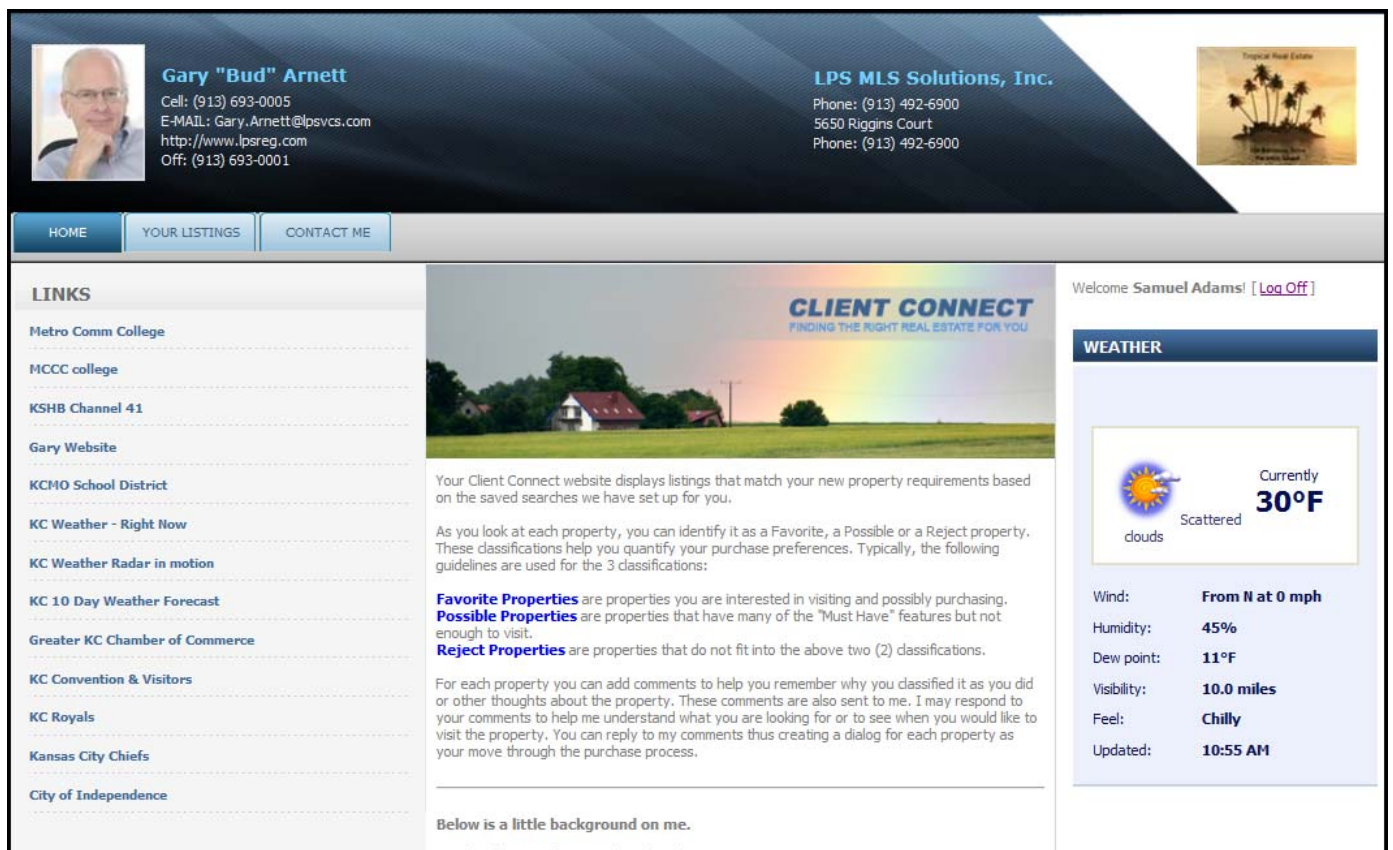


## Client Connect Preferences Wizard

The Client Connect Preferences Wizard walks you through the process of setting up your Client Connect webpage. The set up includes customizing your Agent Contact Information, creating your Client Connect Home Page Message, adding Links to information your clients, customizing your Office Information and how Paragon/Client Connect will notify you of events in Client Connect.

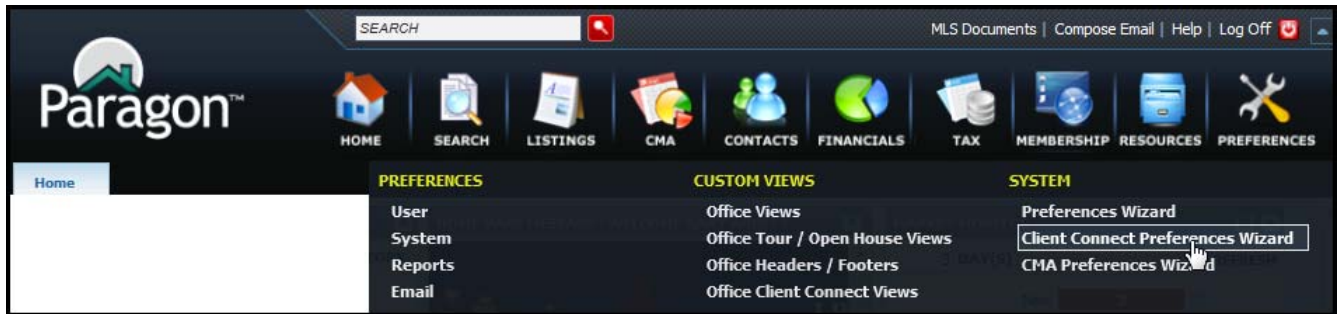
Below is an example of a Client Connect webpage similar to what your clients will see.



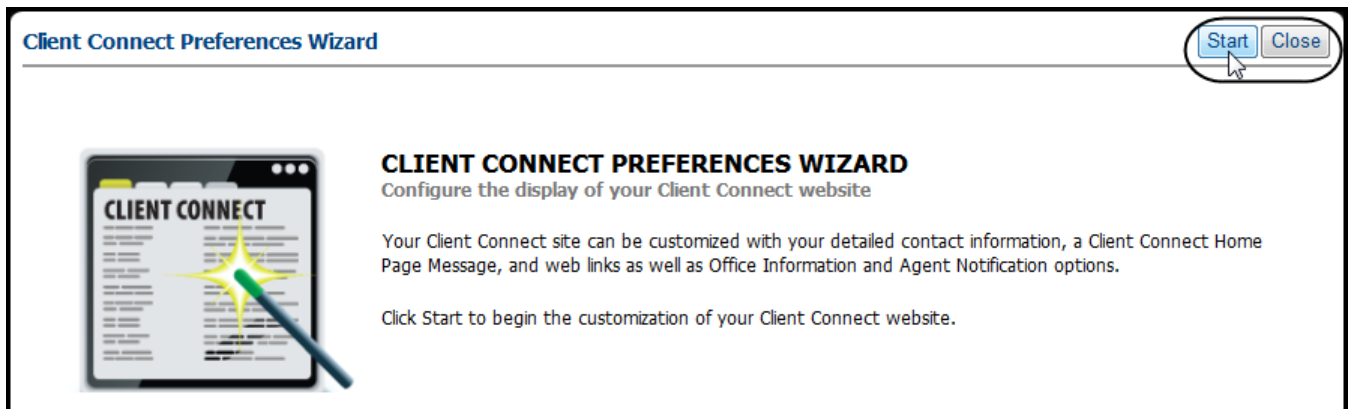
The screenshot shows a professional real estate website. At the top left is a profile for Gary "Bud" Arnett, including his contact information: Cell: (913) 693-0005, E-MAIL: Gary.Arnett@lpsvcs.com, http://www.lpsreg.com, and Off: (913) 693-0001. To the right is the company name, LPS MLS Solutions, Inc., with phone numbers (913) 492-6900 and address 5650 Riggins Court. A navigation bar contains links for HOME, YOUR LISTINGS, and CONTACT ME. The main content area features a "CLIENT CONNECT" banner with the tagline "FINDING THE RIGHT REAL ESTATE FOR YOU" and a background image of a house. Below the banner, there is a section explaining the Client Connect website's functionality, including how users can identify properties as Favorites, Possible, or Reject based on their preferences. A "LINKS" sidebar on the left lists various local organizations like Metro Comm College, MCCC college, KSHB Channel 41, and Greater KC Chamber of Commerce. On the right, there is a weather widget showing "Scattered clouds" and a current temperature of 30°F, along with other weather details like wind speed (From N at 0 mph) and humidity (45%).

This Quick Start Guide shows you each of the customizing steps for your Client Connect webpage. Once the steps of the wizard are completed, this guide will direct you to additional setting for your Client Connect webpage.

**Step 1** - To start the Client Connect Preferences Wizard, click **Preferences** → **Client Connect Preferences Wizard**.



A modal will open. Click **Start** to begin the wizard.



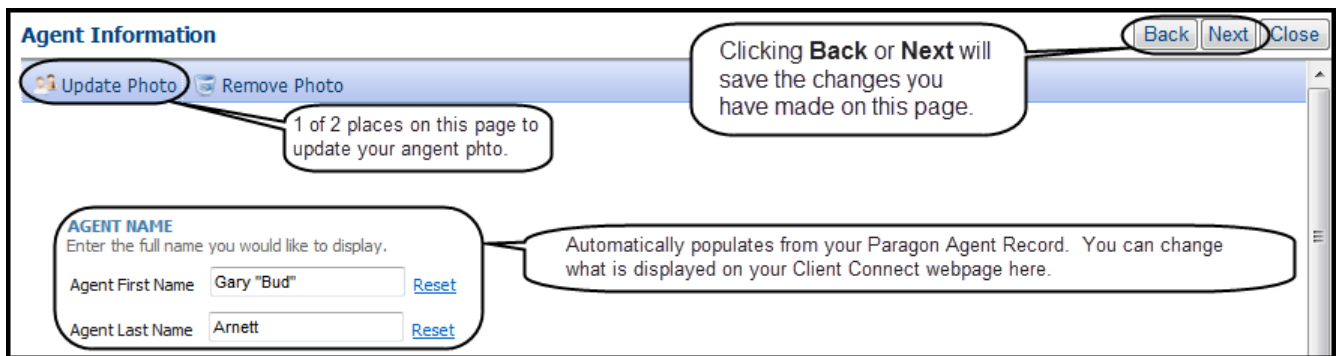
**Note:** When you click the **Next** or **Back** buttons found in the upper right hand corner of the wizard, you automatically save the added content or settings you have made on that page. This is only true when working in one of the Preferences Wizards.

When working in a module wizard, you must click the **Save** button in the upper left corner of the page to save your content or settings on that page.

## Step 2 - Agent Information

**Agent Photo** – your Agent Photo, which was previously added to Paragon, is automatically displayed in this picture placeholder. Click **Update Photo** to view your existing Agent images inside Paragon or upload a new photo, which can be added to this picture placeholder.

**Agent Name** – your names are already in these fields as they appear in your Paragon Agent Record. Since this is your marketing to your clients, you can change how your name appears on your Client Connect webpage. **Your name length can be up to 32 characters.**



**Agent Information**

Update Photo Remove Photo

1 of 2 places on this page to update your agent photo.

Clicking **Back** or **Next** will save the changes you have made on this page.

**AGENT NAME**  
Enter the full name you would like to display.

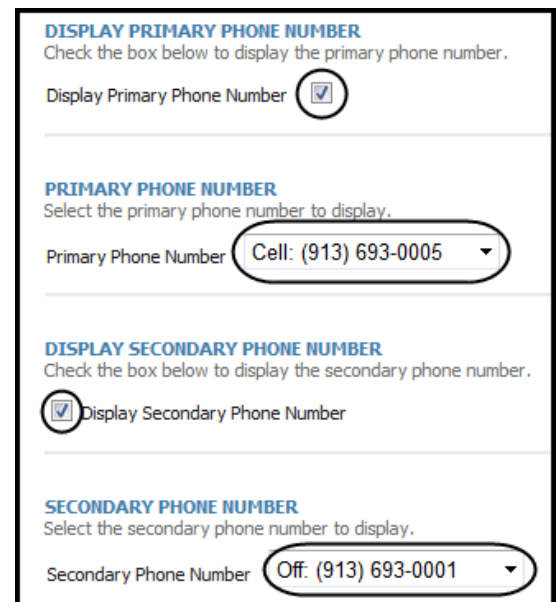
Agent First Name Gary "Bud" [Reset](#)

Agent Last Name Arnett [Reset](#)

Automatically populates from your Paragon Agent Record. You can change what is displayed on your Client Connect webpage here.

Back Next Close

**Agent Phone Numbers** – you can display two (2) phone numbers in your contact information. These phone numbers come from your Agent Record. To display a phone number, check the checkbox. The dropdown box is activated which allows you to choose one of up to five phone numbers in your Agent Record.



**DISPLAY PRIMARY PHONE NUMBER**  
Check the box below to display the primary phone number.

Display Primary Phone Number

**PRIMARY PHONE NUMBER**  
Select the primary phone number to display.

Primary Phone Number Cell: (913) 693-0005

**DISPLAY SECONDARY PHONE NUMBER**  
Check the box below to display the secondary phone number.

Display Secondary Phone Number

**SECONDARY PHONE NUMBER**  
Select the secondary phone number to display.

Secondary Phone Number Off: (913) 693-0001

**Agent E-mail and Web Page Addresses** – your E-mail address and your public webpage address (if entered into your Paragon Agent Record) can be displayed in your contact information, if you check each of the checkboxes.

**DISPLAY EMAIL ADDRESS**  
Check the box below to display the email address.

Display Email Address

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**DISPLAY WEB PAGE**  
Check the box below to display the web page.

Display Web Page

**Update Agent Photo** – this is the other location on this page where you can change your agent image. Click on the picture to open your picture library from which you can choose another Agent Image or add a new image to your picture library.

**AGENT IMAGE**  
Single click on the image below to set a new agent image.



**Client Connect Reports** – there are three (3) types of reports in Client Connect: Horizontal Report, Detail Report and Vertical Report. If you, your office or your MLS have created additional reports, using the dropdown box, you can select one of the other reports. Your selected reports are the reports all of your clients will see when they visit your Client Connect webpage.

**HORIZONTAL REPORT**  
Choose a different horizontal report for Client Connect

Available Reports

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**DETAIL REPORT**  
Choose a different detail report for Client Connect

Available Reports

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**VERTICAL REPORT**  
Choose a different vertical report for Client Connect

Available Reports

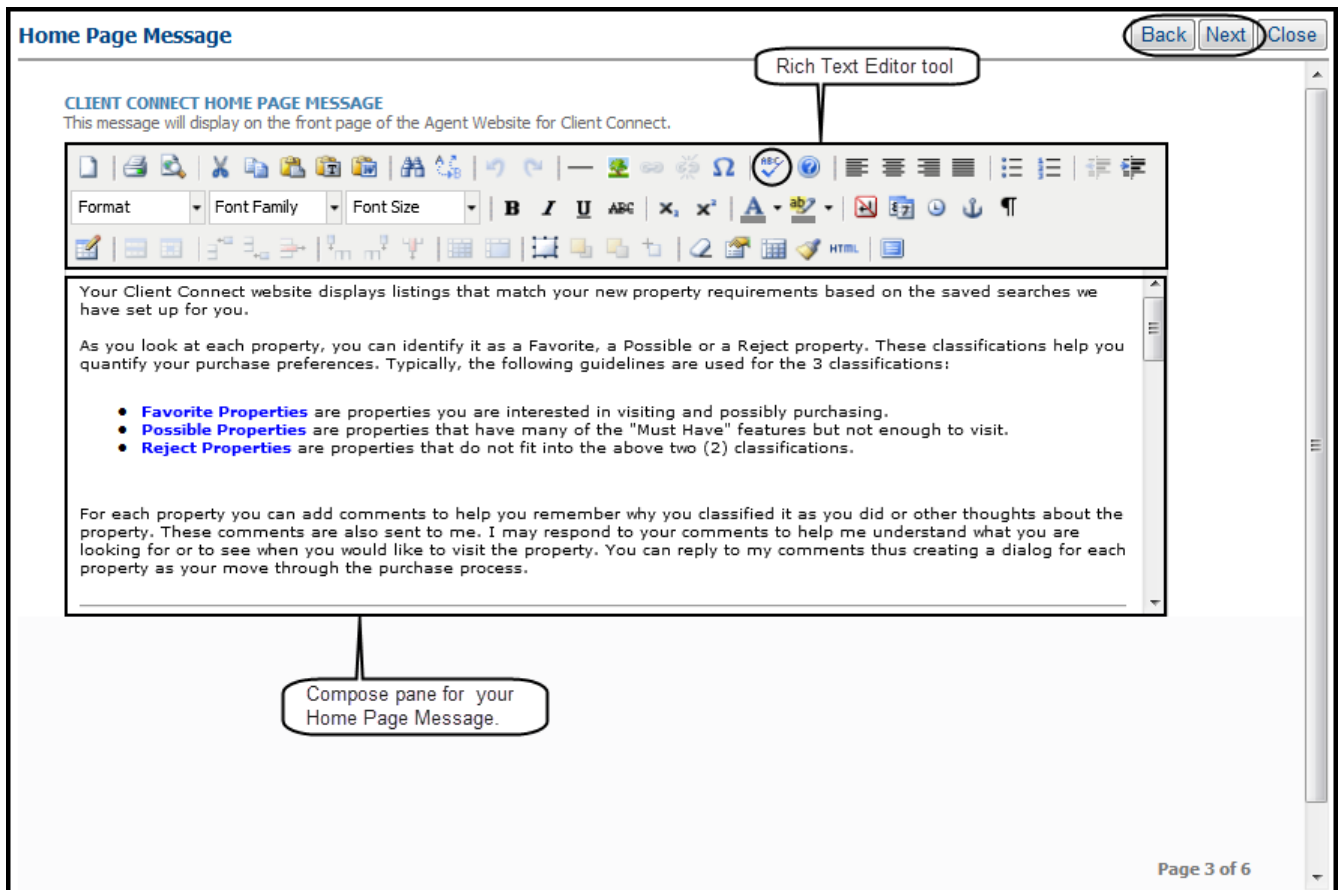
- Gary Vert View
- Vertical View
- Office Vertical View
- Gary Vert View
- My Vertical View

Click **Back** or **Next** to save your Agent Information and move to another step.

**Step 3 – Client Connect Home Page Message** – compose whatever message you want to communicate to your clients. You can explain to them how you plan to use Client Connect. It can be your resume. It can be promote upcoming activities or events. It can be a combination of the above or even something entirely different.

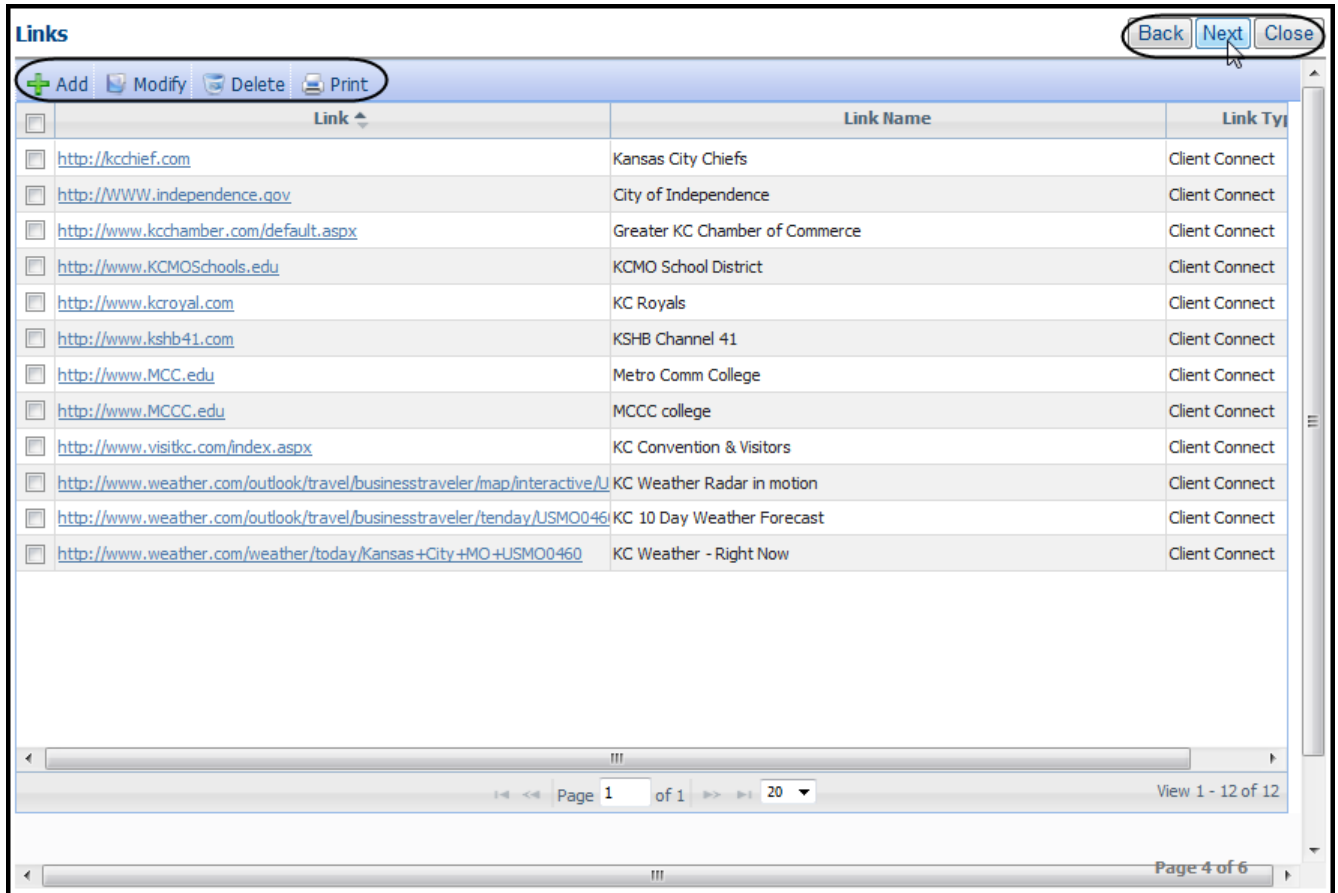
You can use the Rich Text Editor tool at the top of the page to create and customize your message. There is a Quick Start Guide in the Miscellaneous Guides section at the bottom of the Quick Start Guide titled [Rich Text Editor](#) that gives details about the different tools found in the Rich Text Editor.

You can use your favorite word processing program to compose your message so you can copy and paste it into the compose pane.



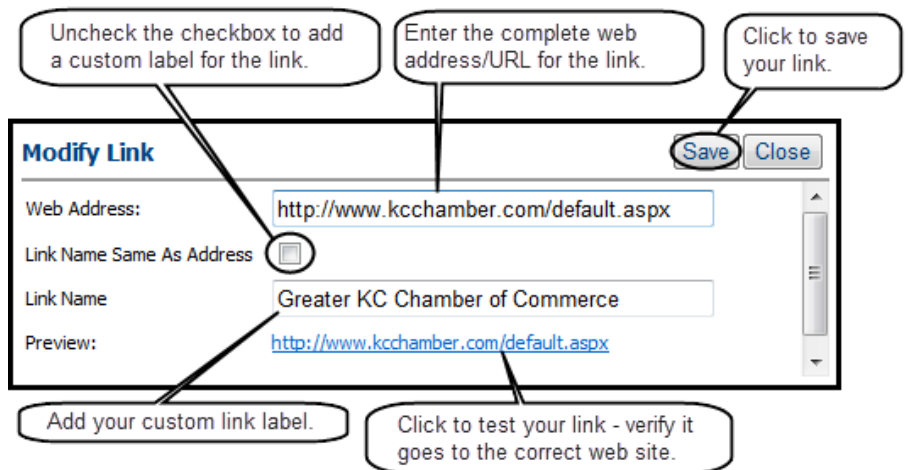
Click **Back** or **Next** to save your Home Page Message and move to another step.

**Step 4 – Links** – you can add Links to the left hand side of Client Connect Home Page. These links can direct your clients to important websites that will assist your clients as they learn about the community into which they are about to move. To add a new link, click **Add**. To modify a link, click **Modify**. To delete a link, click **Delete**. To print the links, click **Print**.



The Add or Modify Link tool

Click **Back** or **Next** to save your Links and move to another step.



**Step 5 – Office Information** just like your Agent Information, you can customize your Office Information. The office information is initially populated from the Paragon Office's Record.

**Office Name** – You can customize the office's name so it is up to 26 characters in length.

**Note:** To change your office logo, click the **Preferences** button and under **Preferences** click **User**.

### Office Information

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**OFFICE NAME**  
Enter the Office name you would like to display.

Office Name  [Reset](#)

**Office Phone Numbers** – you can display two (2) phone numbers in your office information. These phone numbers come from the Office Record. To display a phone number, check the checkbox. The dropdown box is activated which allows you to choose one of up to three phone numbers in your office's record.

**DISPLAY PRIMARY PHONE NUMBER**  
Check the box below to display the primary phone number.

Display Primary Phone Number

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**PRIMARY PHONE NUMBER**  
Select the primary phone number to display.

Primary Phone Number

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**DISPLAY SECONDARY PHONE NUMBER**  
Check the box below to display the secondary phone number.

Display Secondary Phone Number

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**SECONDARY PHONE NUMBER**  
Select the secondary phone number to display.

Secondary Phone Number

**Display Physical Address and Office Logo** – check the checkboxes for each of these information items.

**DISPLAY PHYSICAL ADDRESS**  
Check the box below to display the Office's physical address.

Display Office Address

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**DISPLAY LOGO**  
Check the box below to Office's logo.

Display Office Logo

Click **Back** or **Next** to save your Office Information and move to another step.

**Step 6 - Agent Notification Options -**

You can identify which activities inside Client Connect will send you E-mail notifications. Check the checkbox to activate the notification. Your options are:

- New Listings
- Price or Status changes
- Classification as a Favorite
- Classification as a Possible
- Classification as a Reject
- Addition of Comments

**Agent Notification Options**

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**CLIENT CONNECT NOTIFICATION OPTIONS (AGENT)**  
 These fields identify what actions will trigger an email auto-notification for the agent.

- Notify on new listing
- Notify on price or status change
- Notify on favorite listing
- Notify on possible listing
- Notify on rejected listing
- Notify on comment added
  - Do not include comments in my Client Connect notifications
  - Only include comments in my Client Connect notifications if there are 50 or less
  - Only include comments in my Client Connect notifications if there are 100 or less


Addition of Comments Notifications has three (3) settings.

1. Send an E-mail advising that comments were added.
2. Send an E-mail advising that comments were added and include them if < 50 comments.
3. Send an E-mail advising that comments were added and include them if <100 comments.

Click **Back** or **Next** to save your Agent Notifications Options and move to another step.

**Client Connect Preferences Setup Complete** Back Close

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**CONGRATULATIONS**

You have successfully setup your Client Connect preferences

You have come to the end of the Preferences Wizard for customizing your Client Connect. If you skipped over some sections, you can always come back to it and set up items later once you have a better understanding of what that section(s) affect in Paragon. To run the wizard again or to go to a specific part of Preferences, click on Preferences on the main menu button bar and in the control panel look for all your preferences options.

You may close this wizard now, or move on to the next wizard that will help you in setting up your CMA Preferences.

[CMA Preferences](#)



The following is an additional item to consider as you enhance your Client Connect webpage. To access this area, click **Preferences** → **Preferences** → **Client Connect**.



Click **Banner** to select a different Client Connect webpage header.

Next to each optional banner is a radio button. Click the radio button to the left of the banner you want to use in the header of your Client Connect webpage.

Click **Save** to retain your selection.

