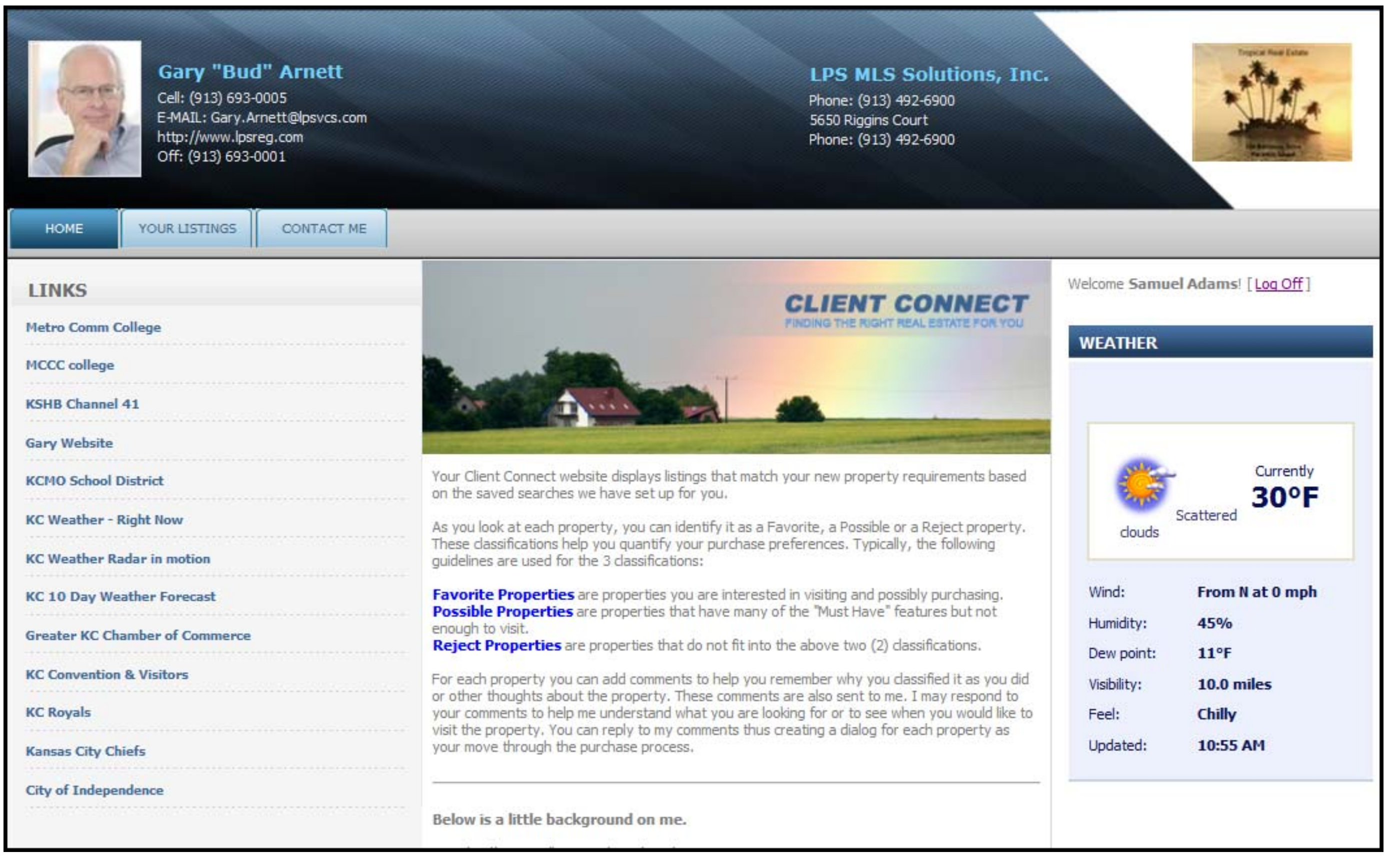
# Client Connect Preferences Wizard

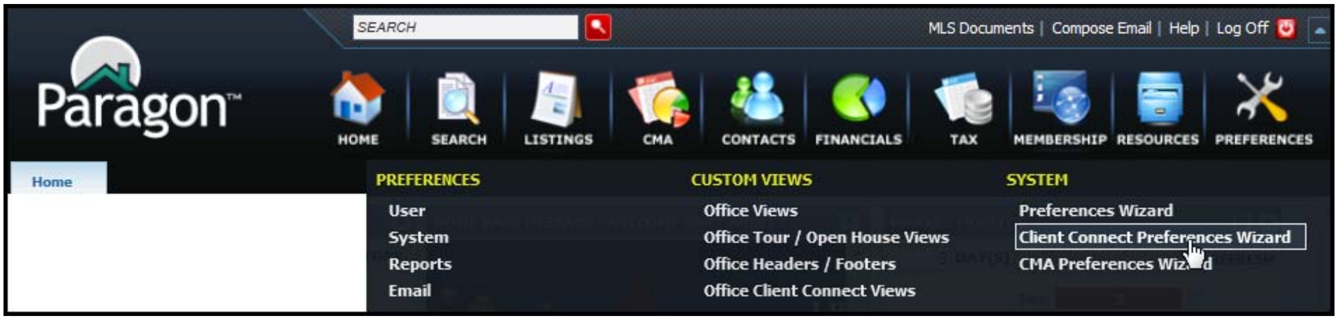
The Client Connect Preferences Wizard walks you through the process of setting up your Client Connect webpage. The set up includes customizing your Agent Contact Information, creating your Client Connect Home Page Message, adding Links to information your clients, customizing your Office Information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

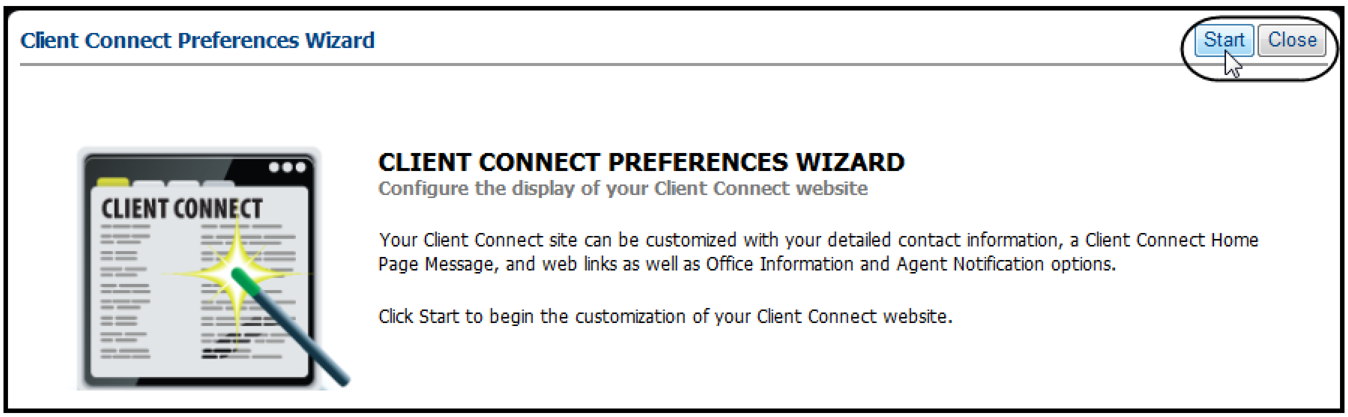



This Quick Start Guide shows you each of the customizing steps for your Client Connect webpage. Once the steps of the wizard are completed, this guide will direct you to additional setting for your Client Connect webpage.

**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.



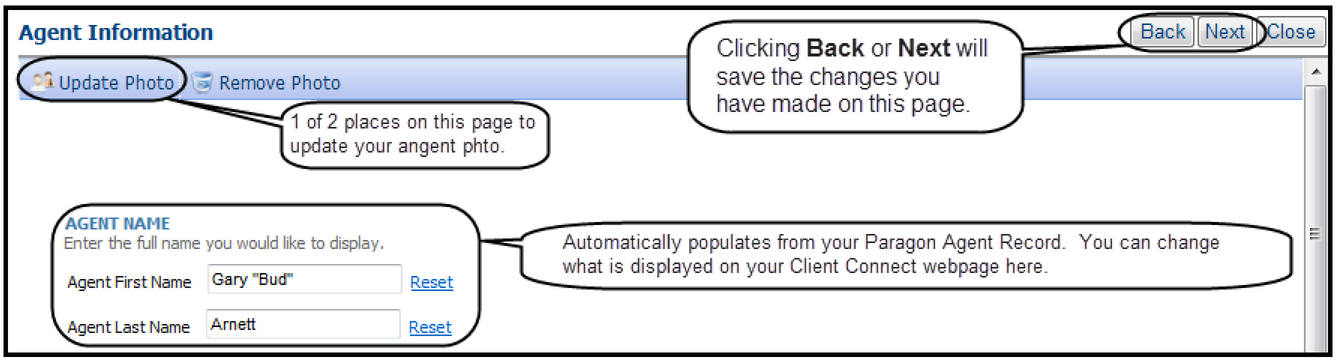

**Note:** When you click the **Next** or **Back** buttons found in the upper right hand corner of the wizard, you automatically save the added content or settings you have made on that page. This is only true when working in one of the Preferences Wizards.

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.

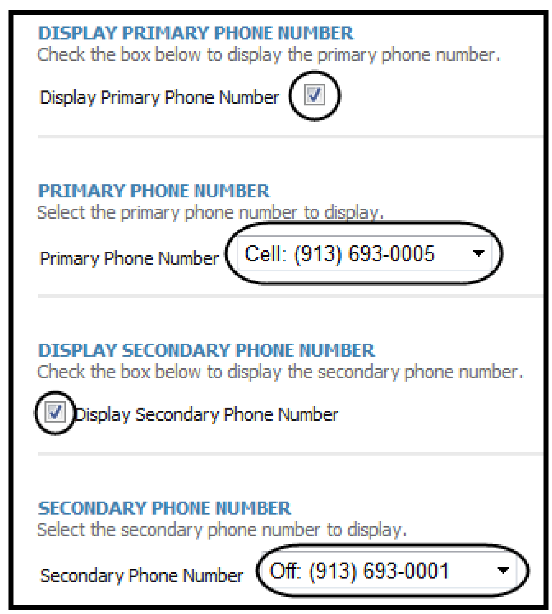
## Step 2 - Agent Information

**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 imagines inside Paragon or upload a new photo, which can be added to this picture placeholder.

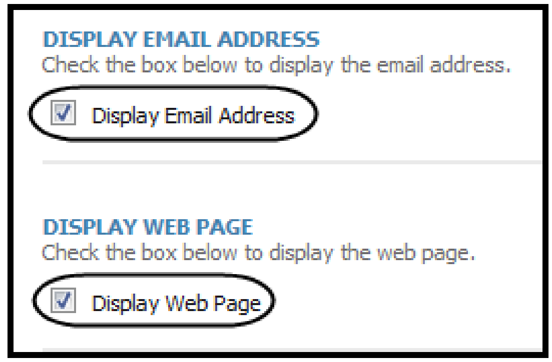
**Agent Name** – your names are already in these fields as they appear in your Paragon Agent Record. Since this is your marketing to your clients, you can change how your name appears on your Client Connect webpage. **Your name length can be up to 32 characters.**




**Agent 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.

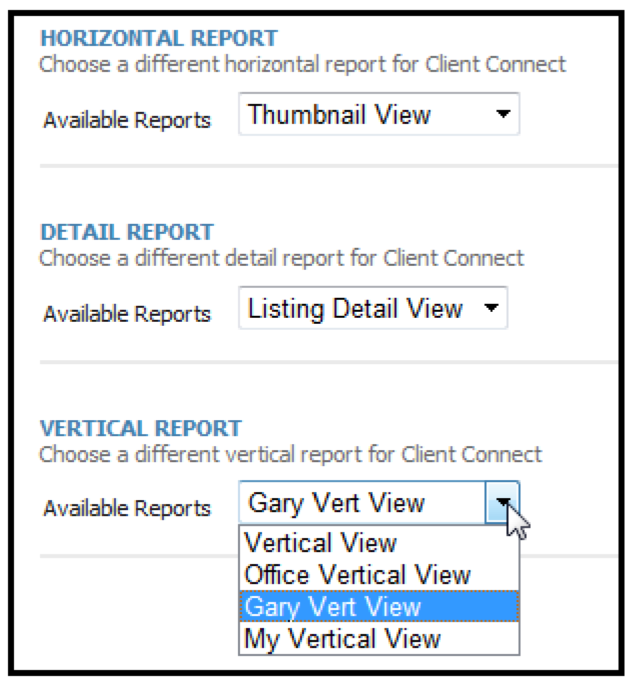


**Agent E-mail and Web Page Addresses** – your E-mail address and your public webpage address (if entered into your Paragon Agent Record) can be displayed in your contact information, if you check each of the checkboxes.




**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.


**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.

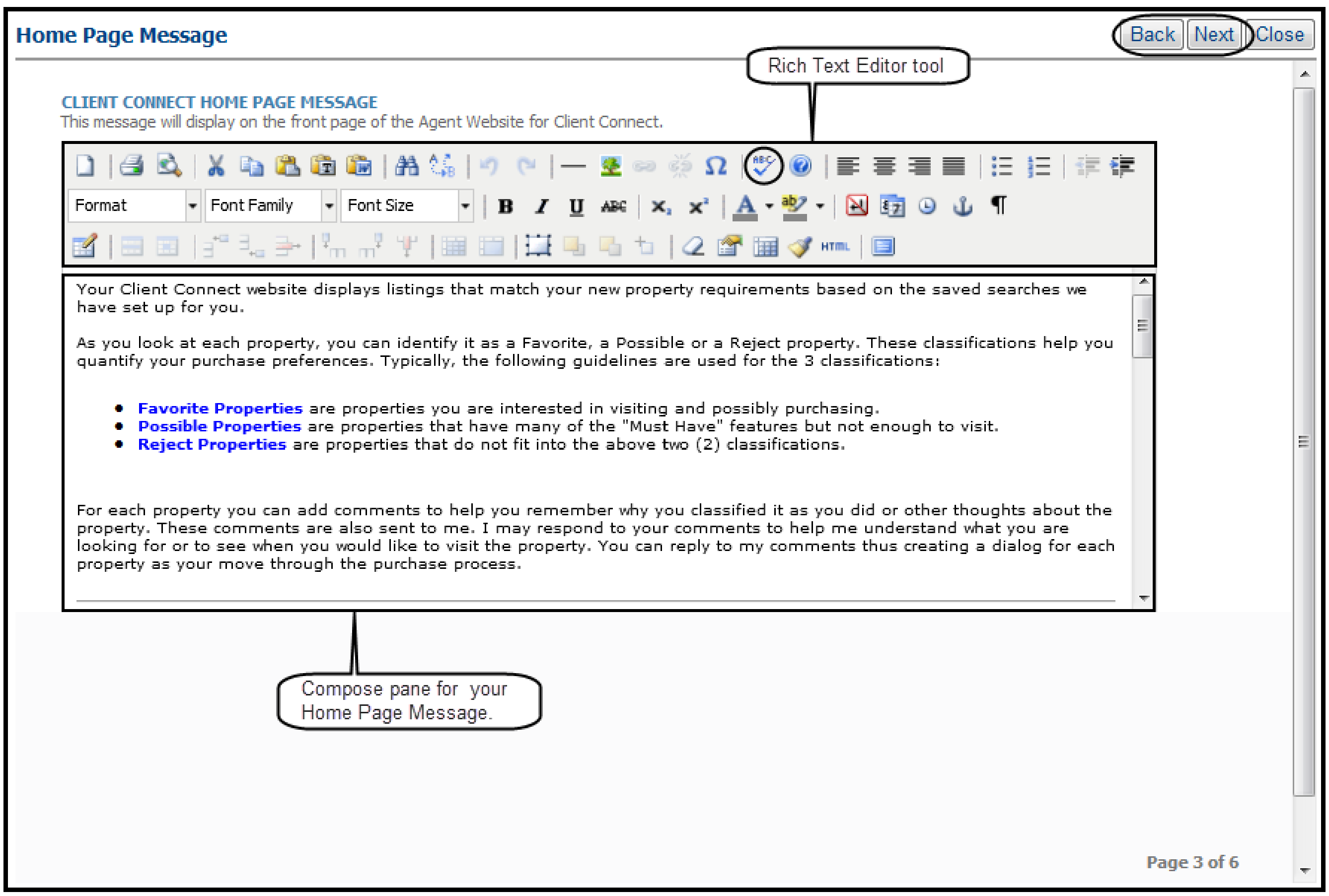



Click **Back** or **Next** to save your Agent Information and move to another step.

**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.

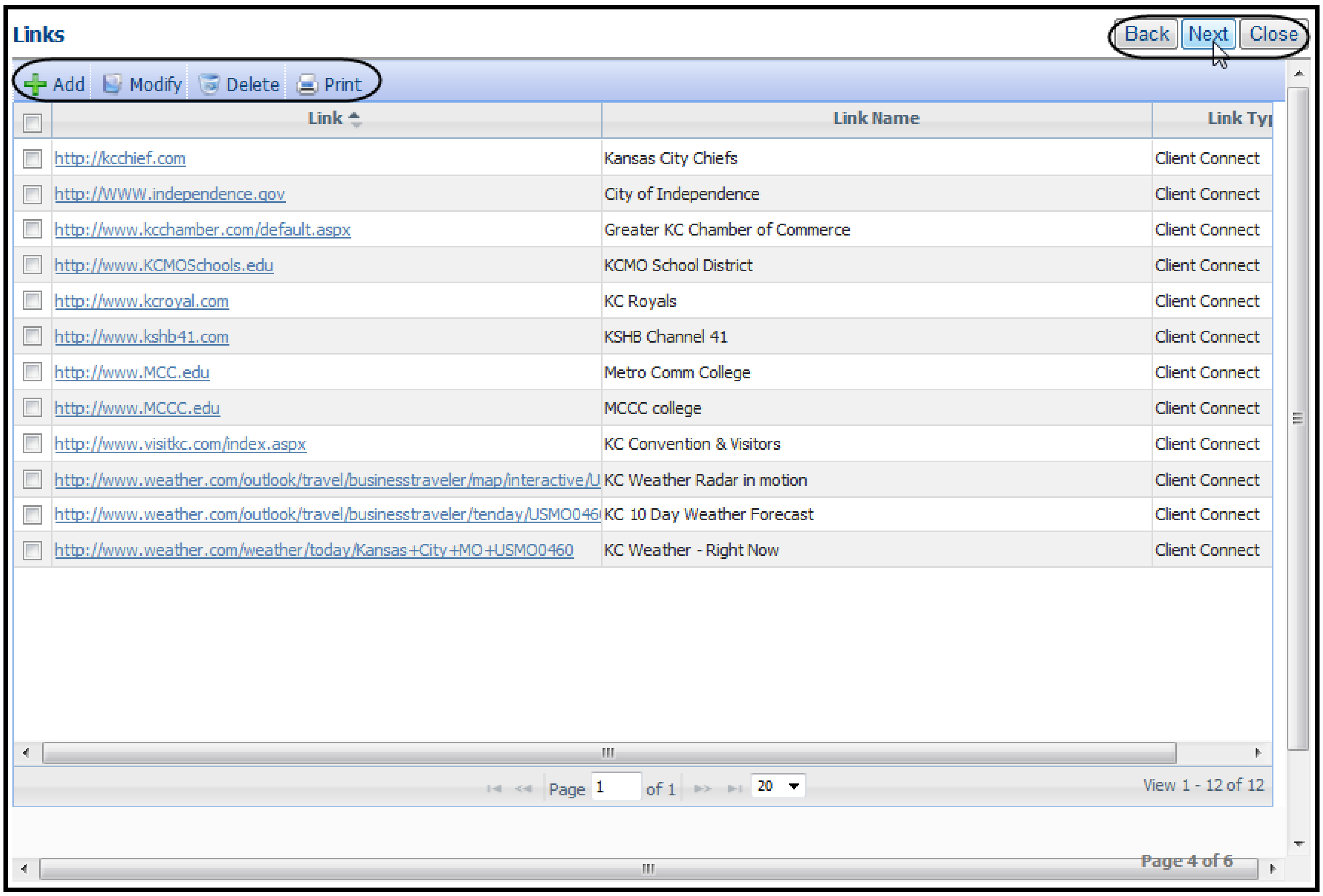
You can use the Rich Text Editor tool at the top of the page to create and customize your message. There is a Quick Start Guide in the Miscellaneous Guides section at the bottom of the Quick Start Guide titled *Rich Text Editor* that gives details about the different tools found in the Rich Text Editor.

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



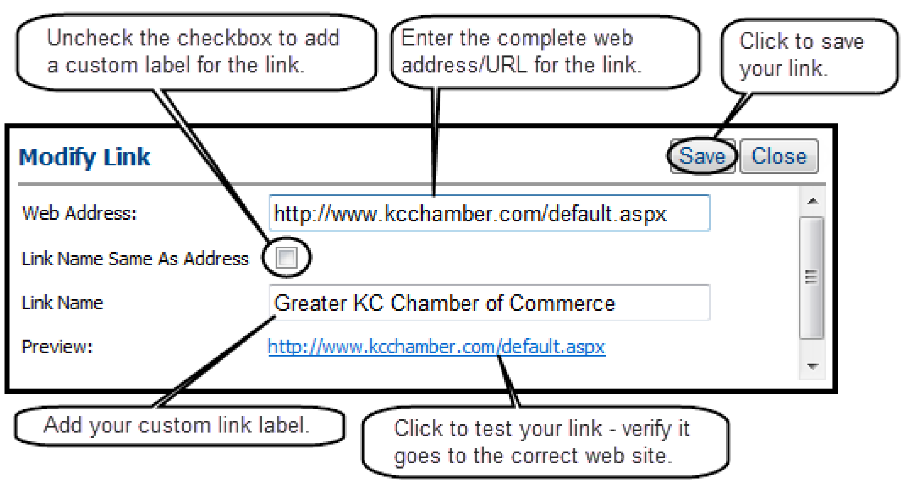

Click **Back** or **Next** to save your Home Page Message and move to another step.

**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**.




| Link | Link Name | Link Typ |
|---|---|---|
| http://kcchief.com | Kansas City Chiefs | Client Connect |
| http://WWW.independence.gov | City of Independence | Client Connect |
| http://www.kcchamber.com/default.aspx | Greater KC Chamber of Commerce | Client Connect |
| http://www.KCMOSchools.edu | KCMO School District | Client Connect |
| http://www.kcroyal.com | KC Royals | Client Connect |
| http://www.kshb41.com | KSHB Channel 41 | Client Connect |
| http://www.MCC.edu | Metro Comm College | Client Connect |
| http://www.MCCC.edu | MCCC college | Client Connect |
| http://www.visitkc.com/index.aspx | KC Convention & Visitors | Client Connect |
| http://www.weather.com/outlook/travel/businesstraveler/map/interactive/U | KC Weather Radar in motion | Client Connect |
| http://www.weather.com/outlook/travel/businesstraveler/tenday/USMO046 | KC 10 Day Weather Forecast | Client Connect |
| http://www.weather.com/weather/today/Kansas+City+MO+USMO0460 | KC Weather - Right Now | Client Connect |

The Add or Modify Link tool

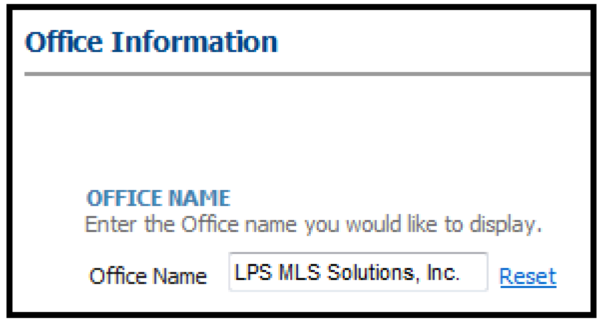



Click **Back** or **Next** to save your Links and move to another step.

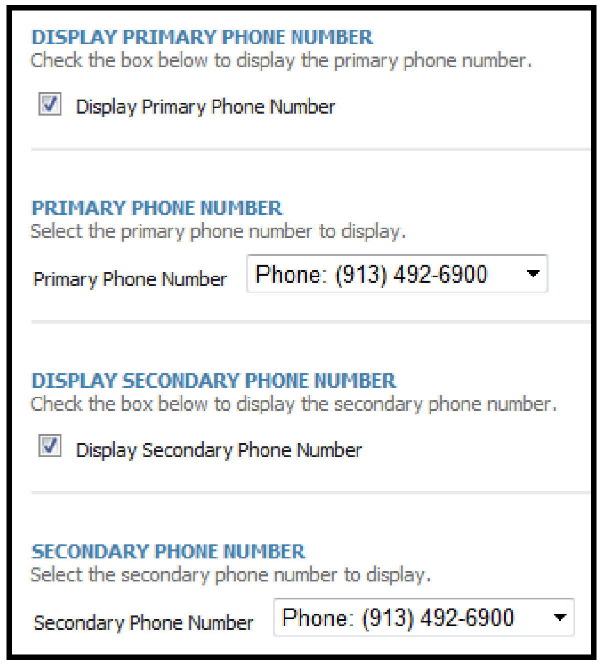
**Step 5 – Office Information** just like your Agent Information, you can customize your Office Information. The office information is initially populated from the Paragon Office's Record.

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

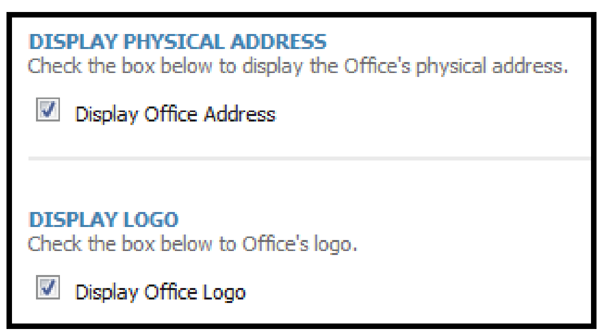
**Note:** To change your office logo, click the **Preferences button** and under **Preferences** click **User**.




**Office 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.



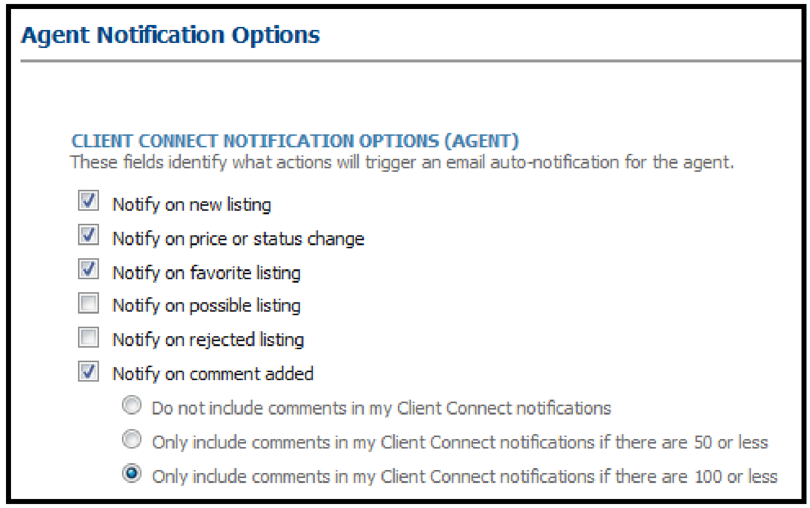

**Display Physical Address and Office Logo** – check the checkboxes for each of these information items.




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:

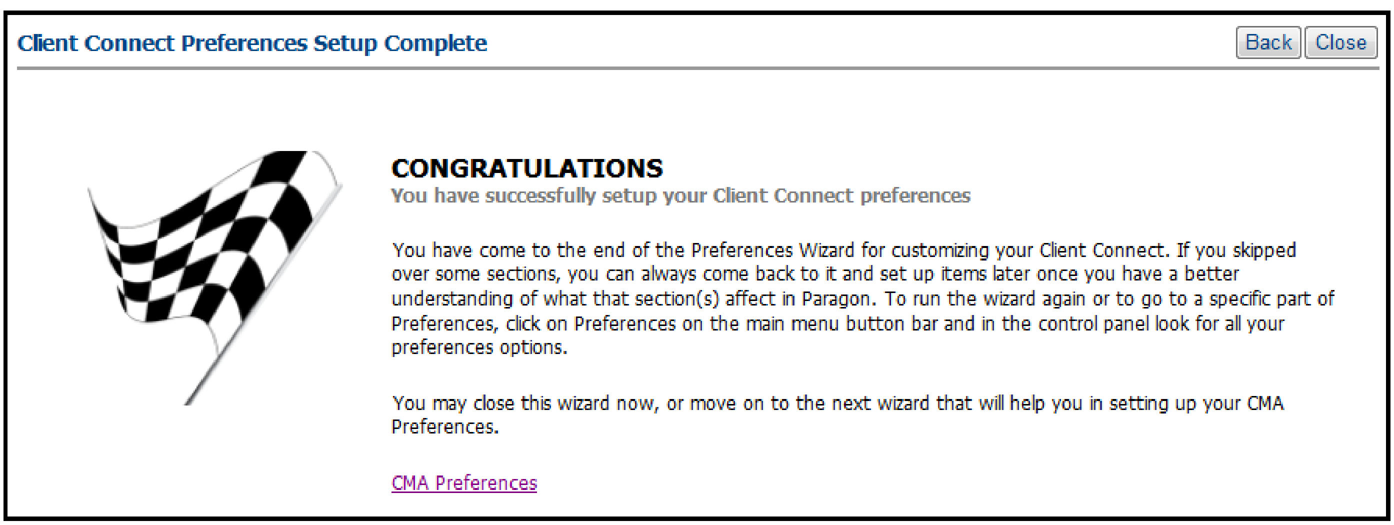
- New Listings
- Price or Status changes
- Classification as a Favorite
- Classification as a Possible
- Classification as a Reject
- Addition of Comments




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.



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.