

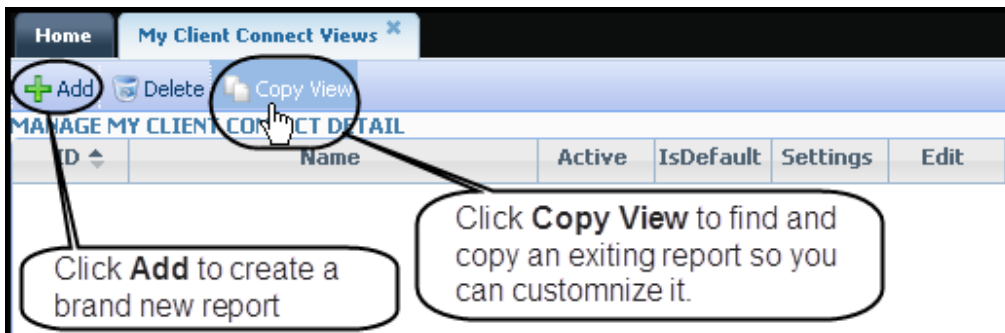
Custom Layout Editor for Custom and Agent Views

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.

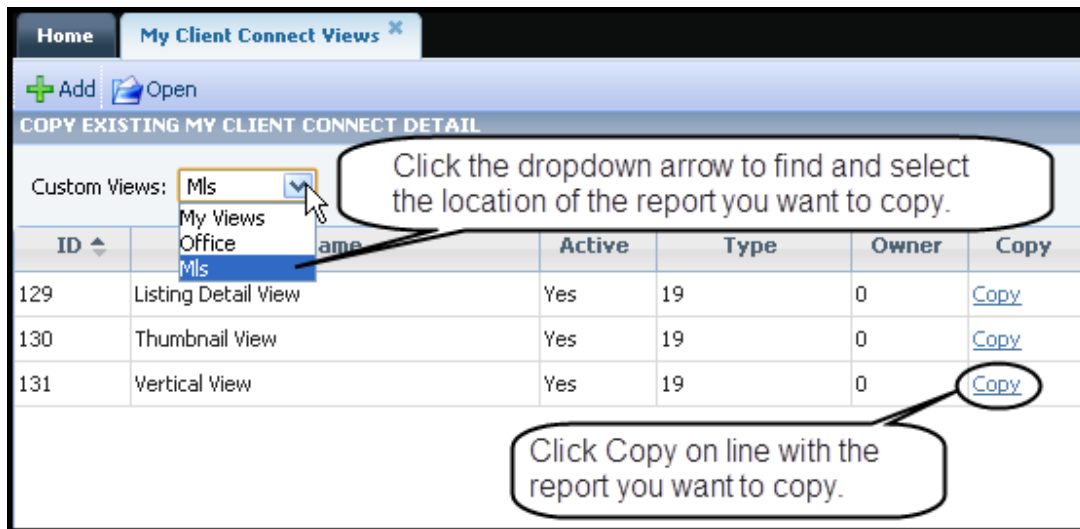
To begin the copy and customize a report process, click **Preferences** and under **Agent Views**, click **My Client Connect Views**.



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.

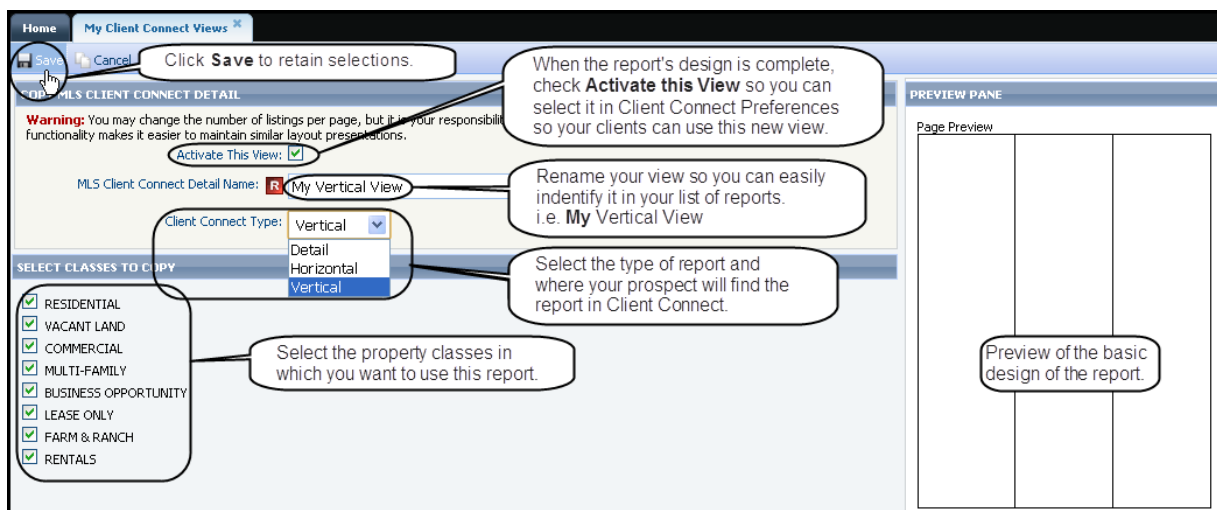


The screen will refresh. In the dropdown box, click the arrow to display the location of the report you want to copy and click that location (My Views, Office or MLS). The screen will refresh again showing the reports in the selected location. Click **Copy** on the right side of the line of the desired 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.

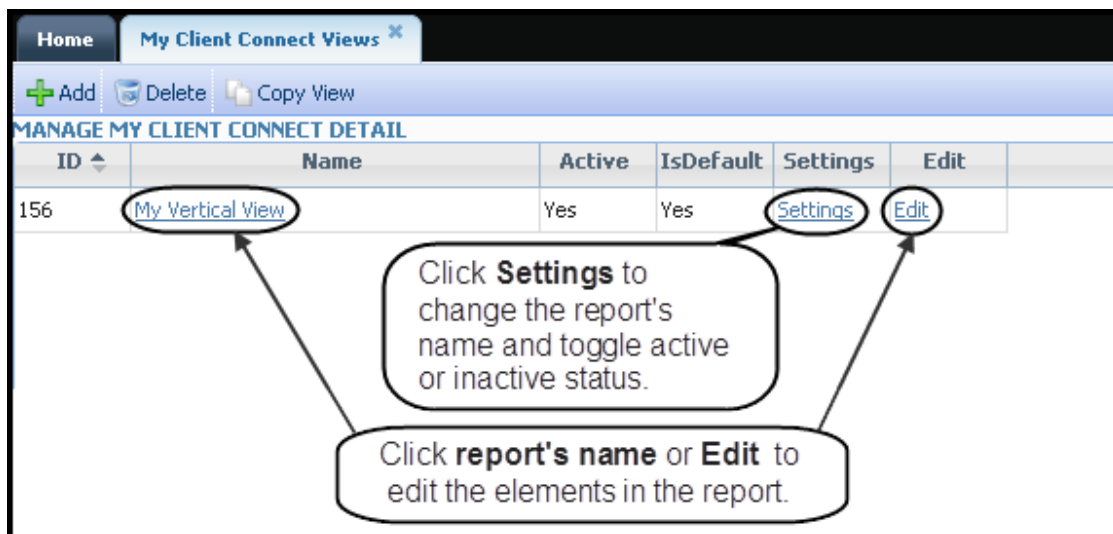
- *Activate This View* to make this report usable when the design is complete
- *MLS Client Connect Detail Name* - rename your report so it is easy to identify from the other reports
- *Client Connect Type* – where the report is saved and used in Client Connect
- *Select Classes To Copy* – choose the property classes in which you will use this report



The screen will change displaying the available reports.

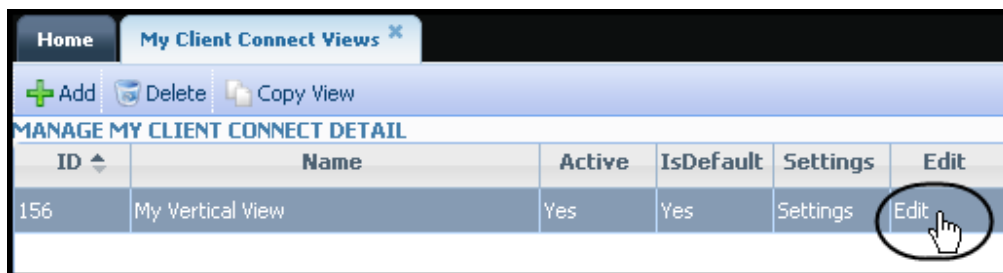
To edit the report elements, click either the **report's name** or **Edit**. Report elements include field labels and data, field preference boxes, quick links (M, H, D, I, N, etc.), maps, checkbox, text box, font size, color and bolding, borders, images (agent, office, listing and special images), etc.

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.

The screenshot shows the Paragon design editor interface for 'My Vertical View'. The interface includes a top menu bar with 'Home' and 'My Client Connect Views', and a left sidebar with a 'Class' selection list and a 'Fields' panel. The main workspace displays a report layout with various design elements and callouts:

- Checkbox:** A callout pointing to a checkbox in the top right corner.
- Field Label - You can edit this text:** A callout pointing to a text field in the top right corner.
- Text box - your own text:** A callout pointing to a text box containing 'NEW LISTING! PRICE CHANGE!'.
- Field Data:** A callout pointing to a field containing 'MLS # (2) Data'.
- Listing Image:** A callout pointing to a placeholder for a listing image.
- Listing Image - size can be changed unlike Thumbnail Image. Keep shape landscape with a ratio: 150 (wide) by 115 (high):** A large callout box explaining the image size and aspect ratio.
- Client Connect Quick Links:** A callout pointing to buttons labeled 'FAVORITE', 'POSSIBLE', 'REJECT', 'COMMENTS', and 'NEW COMMENT!'.
- Field Preference Box - double click on this box to display and select Fields and/or Features. When viewing search results with report, you may be able to click on the customizing gear to add fields to the report.** A callout pointing to a box containing a list of fields like 'Status', 'Class', 'Type', 'Area', 'Asking Price', etc.
- Box to separate individual listings in the report.** A callout pointing to a dashed border box.
- Select the property class then use the design tools to customize the report for the selected class.** A callout pointing to the 'Class' selection list.
- These design element containers are expanded on the next page.** A callout pointing to the 'Fields' panel.

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)

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

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

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

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

Grid/Default Font & Style

SNAP TO GRID OPTIONS

Snap to Grid

X:

Y:

TEXT FONT

Tahoma ▼

11px ▼

B I U ... K ☰

■

DATA FONT

Tahoma ▼

11px ▼

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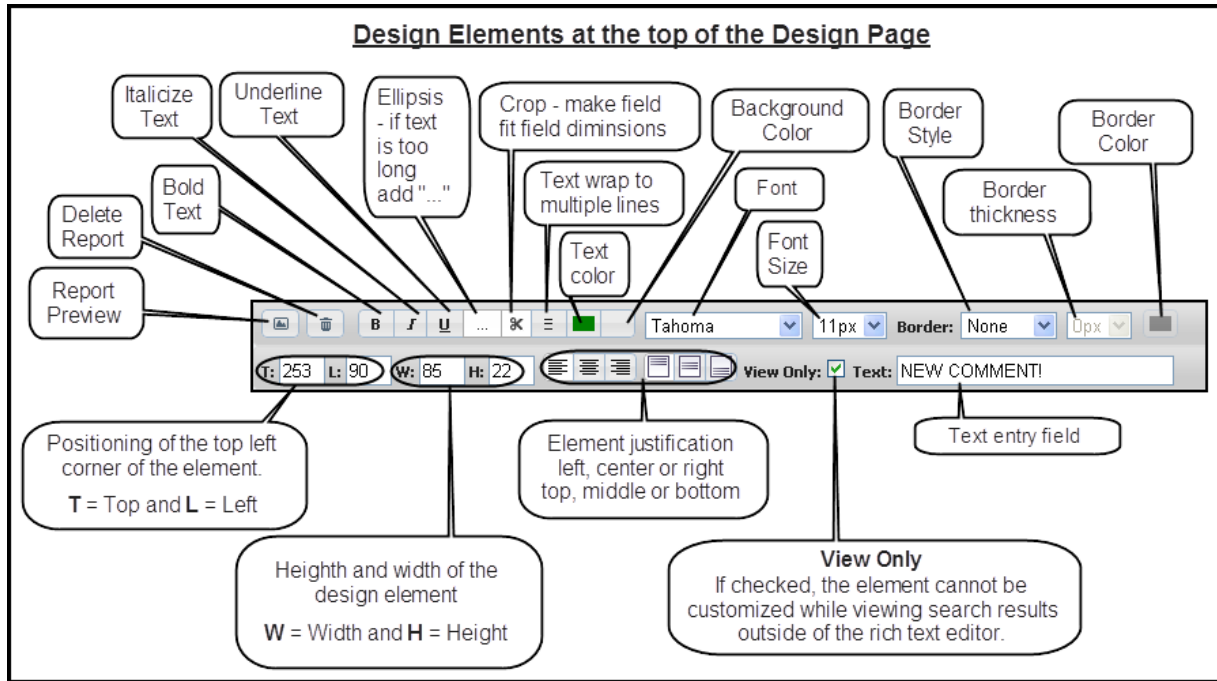
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Grid/Default Font & Style

- * 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)

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

Below are the design elements found 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

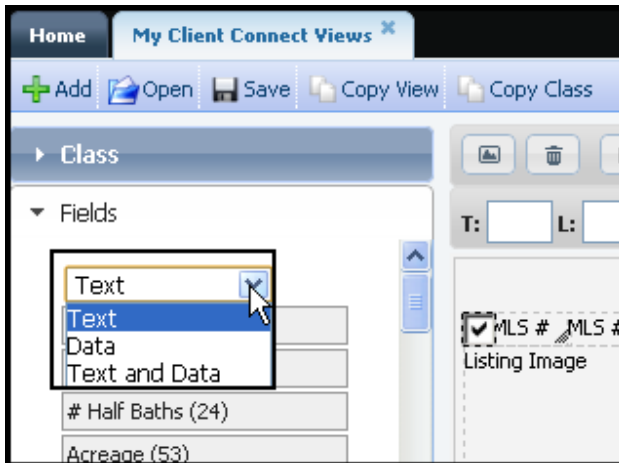
Save your work inside the Rich Text Editor. Paragon does not automatically save your work.

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

Adding Design Elements to your Report

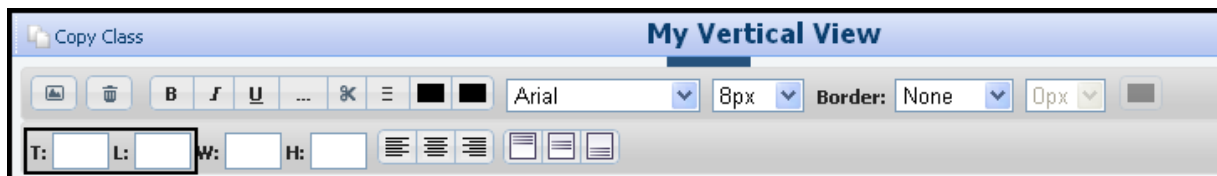
The rich text editor’s design elements are added to your reports through the “drag and drop” method. Left click on the design element found in the left side of the Design Page and drag it to its location on the report. Release your mouse button to place the element on the report.

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.



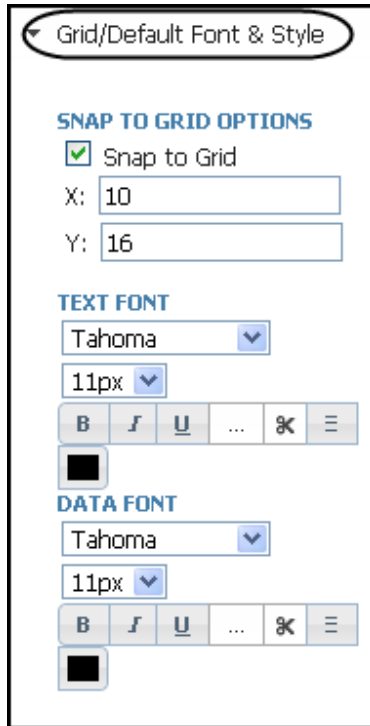
Justifying fields to a common vertical or horizontal position

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. 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.



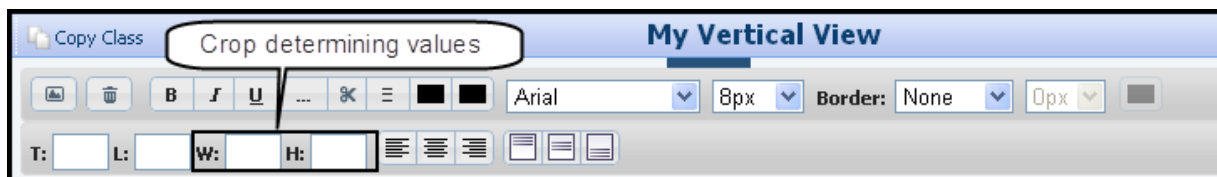
Setting a Default Report Style

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

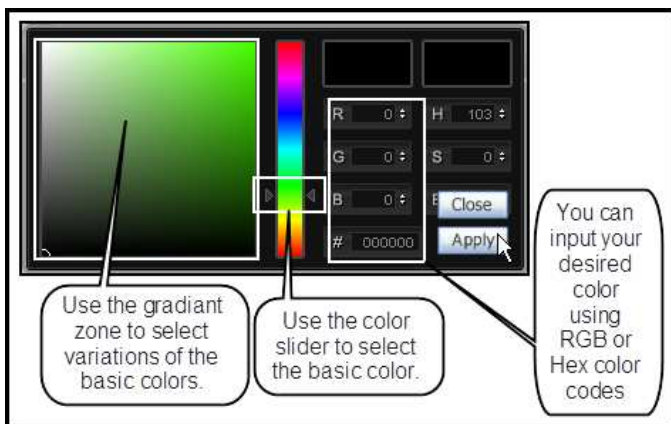
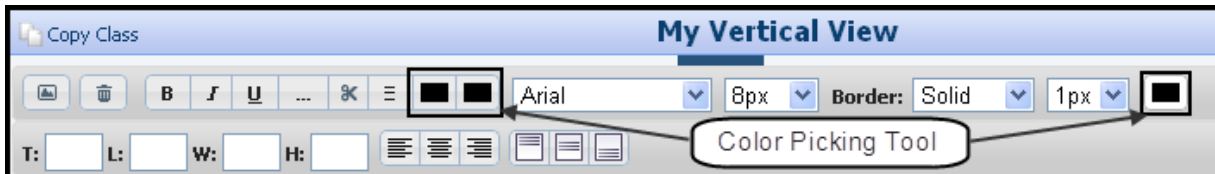
The Listing Image size can be changed. When added to a report, the Listing Image is 150 x 115. If you want to make the Listing Image larger or small, make sure the images have the same height vs. width ratio. I.E. 560 x 430 or 100 x 77

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.