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Welcome To The Paragon™ 3.4 Prospecting Guide

Prospecting can be simplified by using the following steps:

1. Build the search
2. Save the search
3. Email the results to your client
4. Setup your client as a contact
5. Assign the search to your contact (thus making them a prospect)
6. Turn on the Automatic Notification

The following tutorial will assist you in performing these steps...

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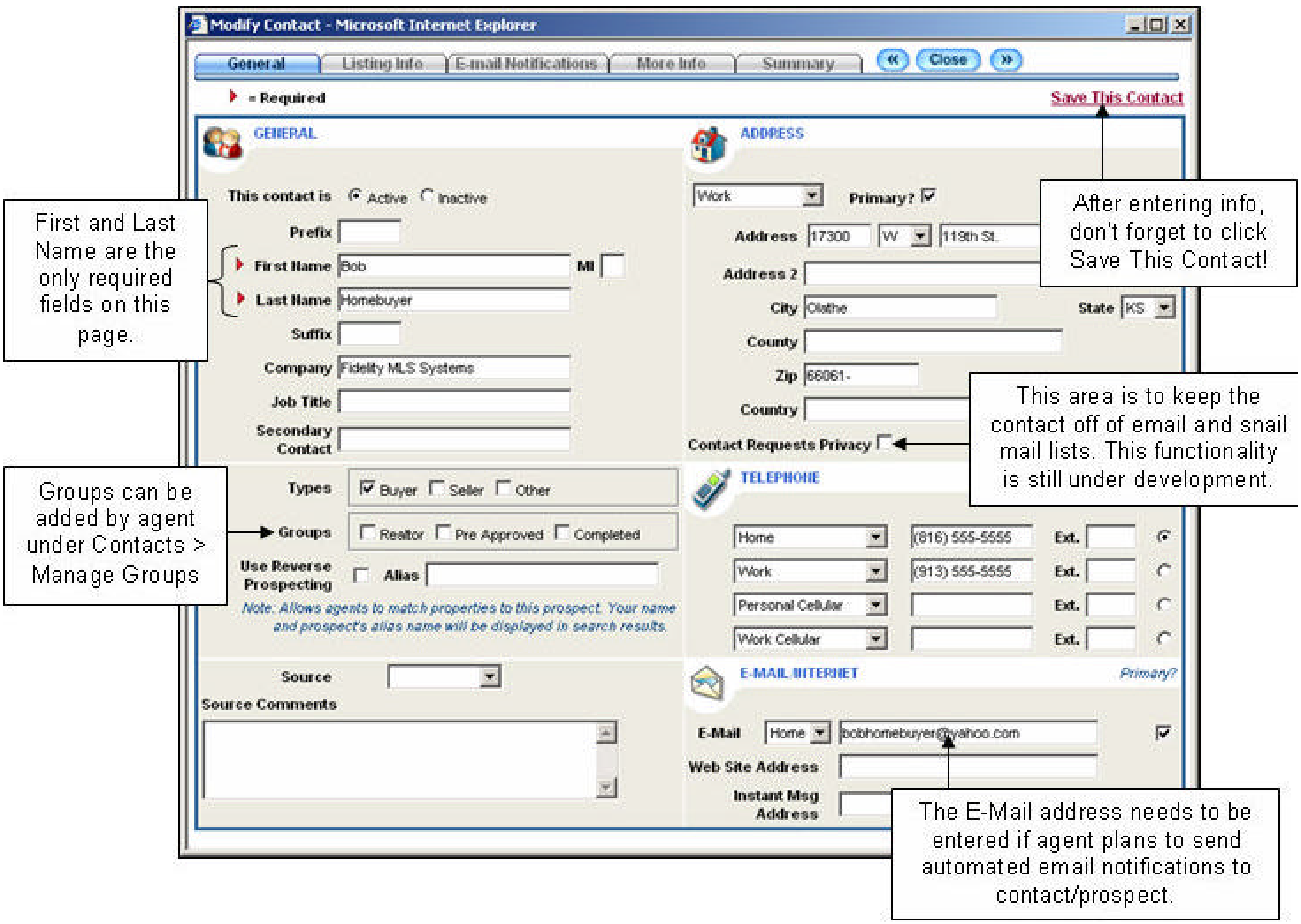
Setting Up A New Contact/Prospect

The Contact Manager is intended to aide agents in managing their contacts by providing a one-stop area for all information regarding their sources. In addition, contacts can quickly be added as a prospect by assigning a search to the contact and setting them up for auto-email notifications on new and changed listings.

The tabs are laid out in logical format going left to right. By the time an agent reaches the Summary tab, the prospect will be completely set up.

To add a new contact

1. Click **Contacts > Add Prospect/Contact** to load the following contact manager screen.



2. Enter information into the General, Address, Telephone, and E-Mail Internet sections. Note: the First and Last Name are the only two required fields on this page.
3. After entering information into the appropriate fields, click "Save This Contact" to complete the contact setup.

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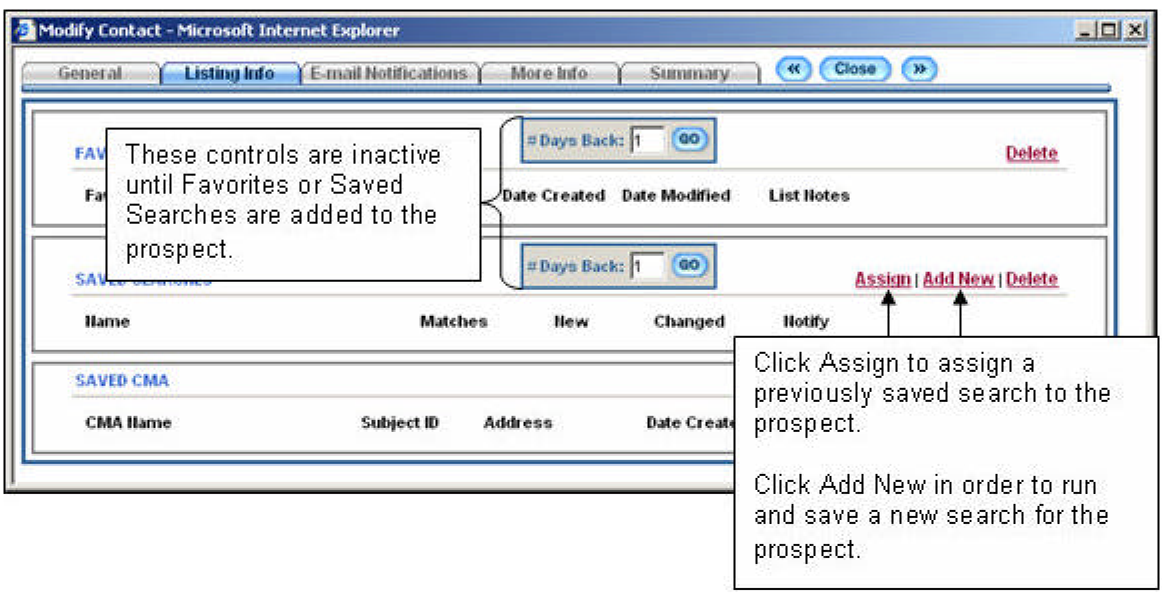
Assign or Add a New Search To A Contact/Prospect

To set up and assign a search to a contact (thus making the contact a prospect), click the Listing Info tab at the top of the Contact Manager window. There are two ways to get to this window from the homepage:

1. Click the Contacts button > select Modify Prospect/Contact > click the Prospect View radio button in the top left margin > double-click on the prospect's name or select "View Listing Info" from the "--Select--" drop-down menu in the same row as the prospect name.
2. Click the Contacts button > select View Prospect List > double-click on the prospect's name or select "View Listing Info" from the "--Select--" drop-down menu in the same row as the prospect name.

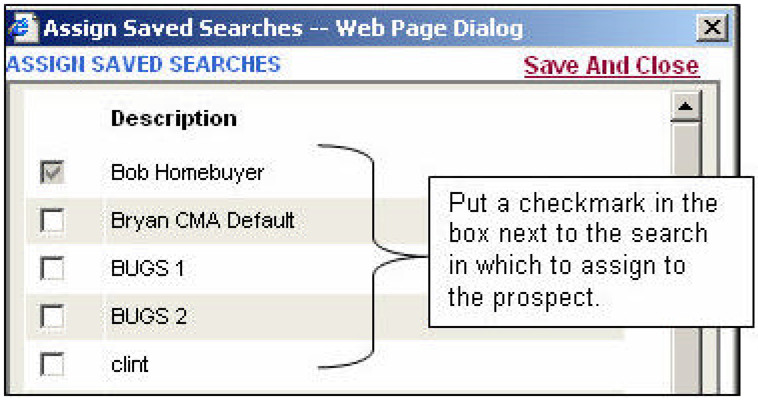
This will bring up the following Listing Info page.



From this page agents can assign previously saved searches to the prospect or add a new search and assign it to the prospect.

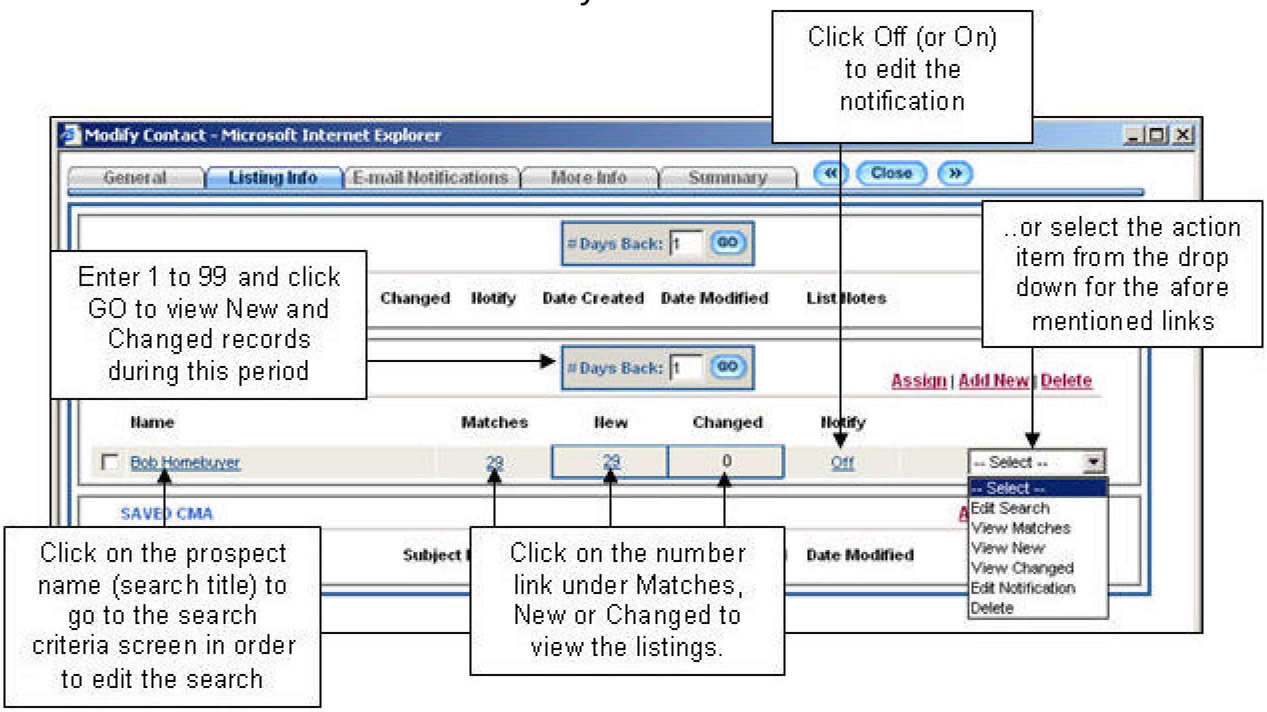
To Assign a Search

1. Click **Assign**
2. A list of previously saved searches will launch



3. Click the search to assign to the prospect
4. Click **Save And Close**

The Assign Saved Searches window will close and return the agent to the Listing Info tab with the search appearing under the Saved Searches section of the page. The following diagram describes the various functionality of the links in the search results area.

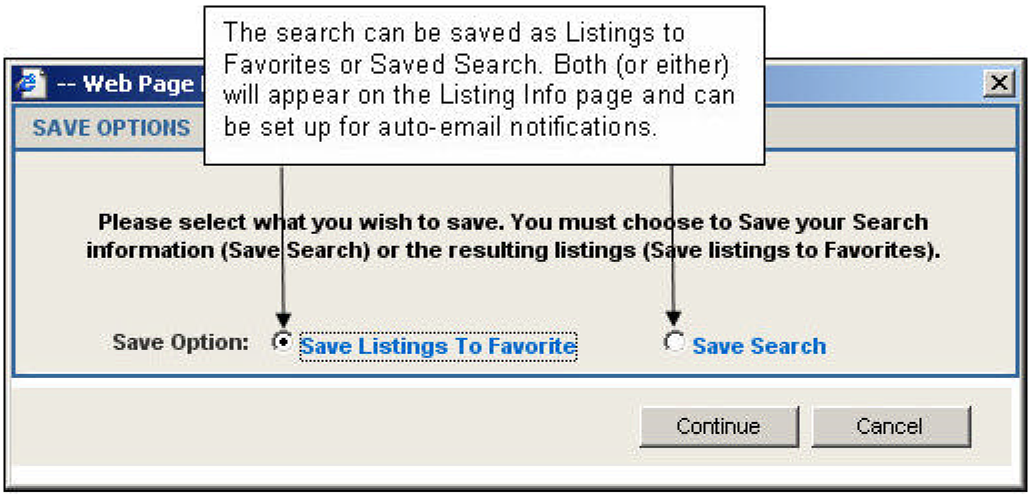


To Add a New Search

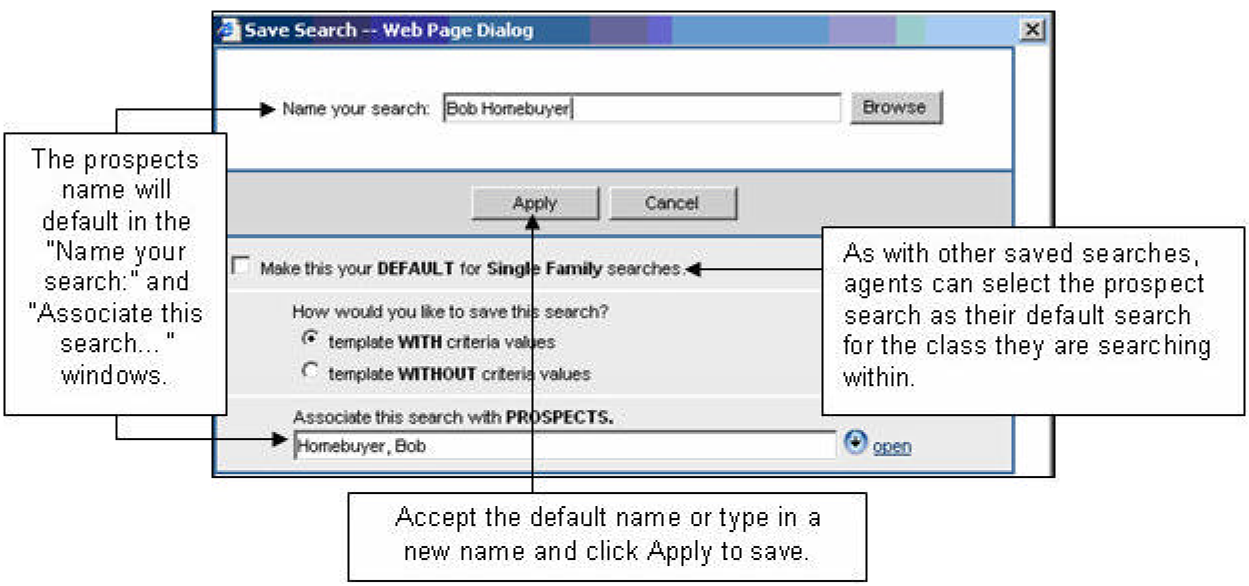
1. Click **Add New** and a search window will launch within the Listing Info page
2. Select the class and click apply
3. Enter in the criteria for the prospect's search
4. Click Search

   Note: The MLS can limit the allowable statuses to be used for a prospect search. If there are limitations, a warning message will appear when the user tries to save the search indicating that the search contains criteria that are not allowed for prospecting.

5. Click **Save** to attach the search to the prospect and check one of the following from the pop up window:
   - Select “Save Listings To Favorite” and the search will be available from Search > View Favorites > Favorite Lists For My Clients.
   - Select “Save Search” and the prospect name will default to the “Name your search:” window and automatically associate the search with the prospect.



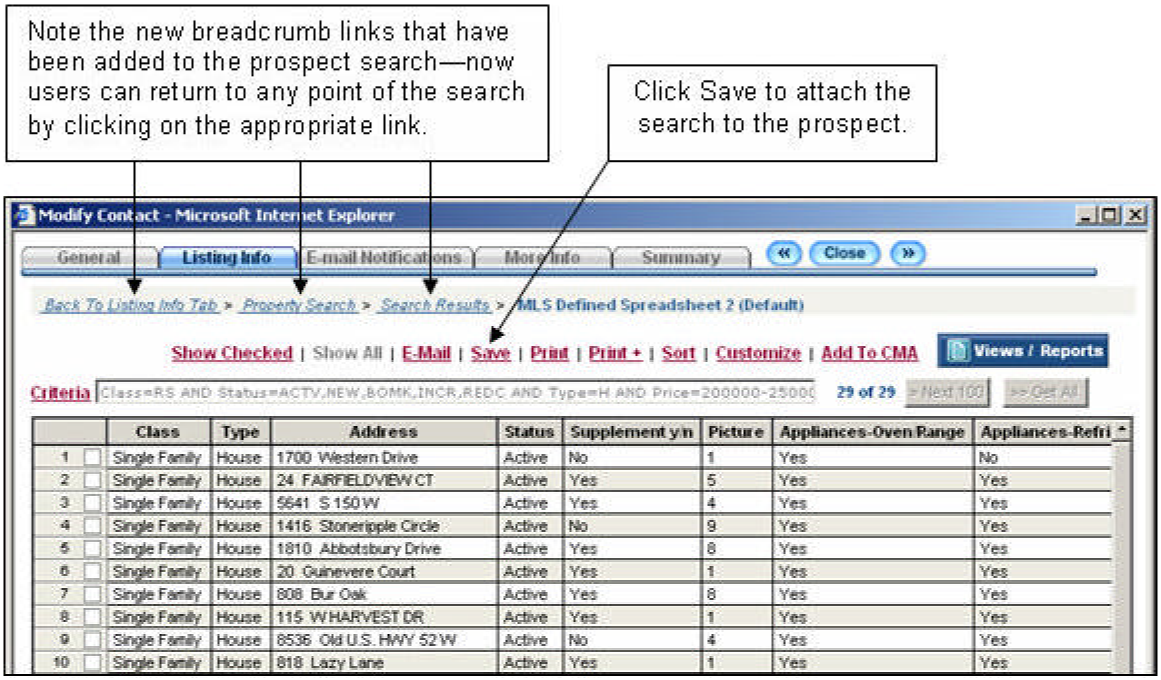
6. For the purpose of this lesson, click Save Search and then the Continue button and the following window will launch and automatically default the prospect name in the “Name your search:” window and automatically associate the search with the prospect.



7. Click the Apply button.
   Note: If there already exists a search with this user's name attached, users will be prompted that there is a search with that name and will ask if it is okay to overwrite

with this new one.

8. Click the Listing Info tab.
9. The new search will now appear under Saved Searches under the prospect's name showing the number of matches, new and changed listings. Agents can also enter up to 99 days back (by entering the number into the "# Days Back:" field and clicking GO) to see if there are any other properties that match the prospects criteria.



Note: If planning to set up auto-email notification for a prospect, the initial search results must manually be emailed to the prospect. Only subsequent search results will be automatically be emailed.

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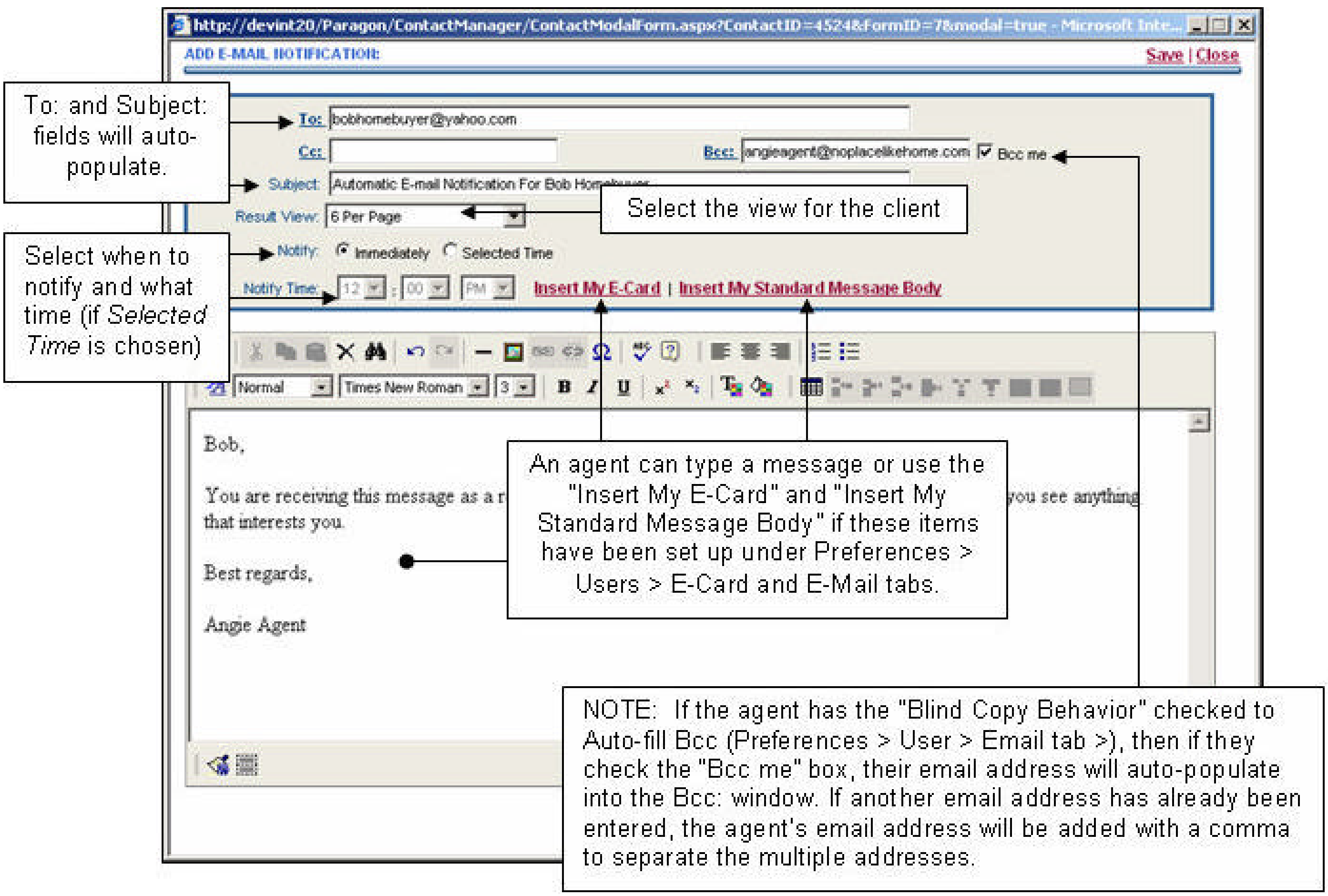
Set Up Auto Email Notifications

Use the following steps to set up auto email notifications for prospects.

1. From the home page, click the Contacts button.
2. Select View Prospect List.
3. Double-click on the name of the prospect in the list or select "View Listing Info" from the "--Select--" drop-down menu.
4. Click on the Listing Info tab.
5. Assign or Add New search to the prospect (see Assign or Add a New Search To a Contact/Prospect).
6. Click on the word "Off" in the Notify column for saved searches.
7. The following email window will launch.



8. The "To:" and "Subject:" fields will auto-populate, however, the information can be changed or retyped.
9. Select the view for the prospect to see under the "Result View" drop-down menu.
10. Select when to notify. If "Selected Time" is chosen, enter the Notify Time. Note: Paragon automatically performs the prospect searches every 15 minutes. If

"Immediately" is selected, the prospect will receive an email within 15 minutes of the added/changed listing.

11. Type a standard message to use for each email or insert E-Card and Standard Message Body.
12. Click **Save | Close**.

The email notification will continue until the agent turns it off.