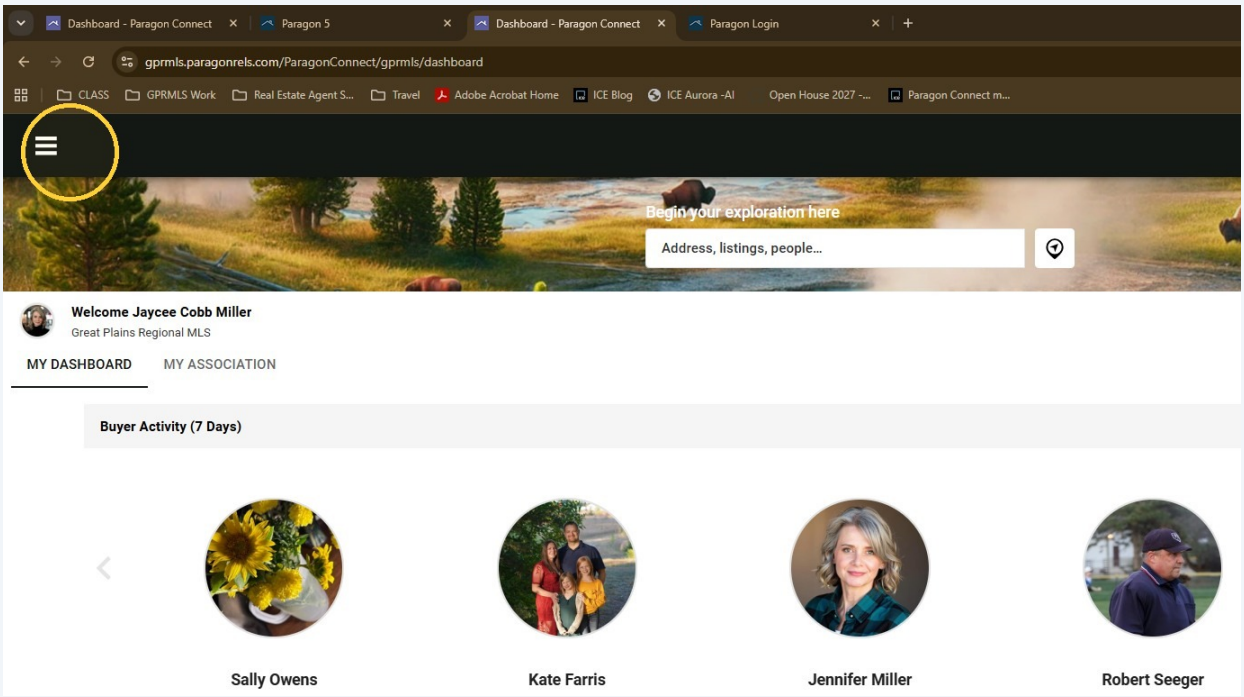
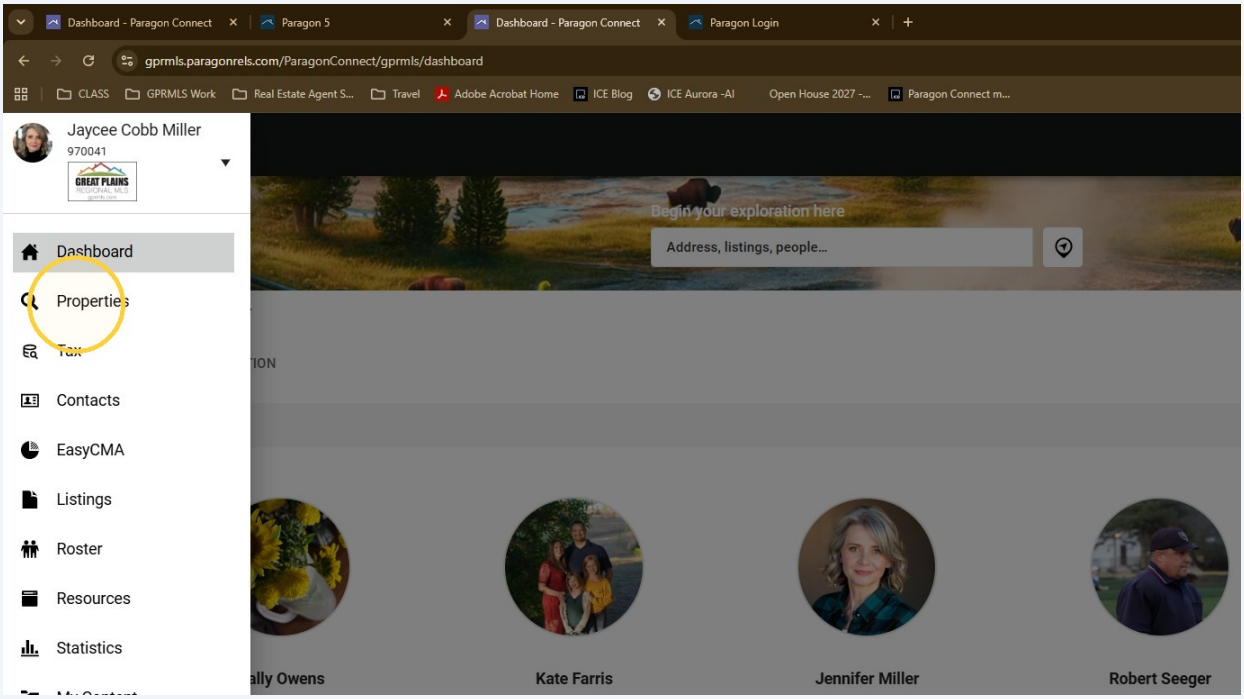
Paragon Connect Setting Up A Saved Search

This guide shows, step-by-step, how to create and run a reusable property search in Paragon Connect so you can quickly track listings that match specific criteria (property type, city, and price range). It's useful for saving time, staying organized, and getting immediate results from your personalized saved searches.

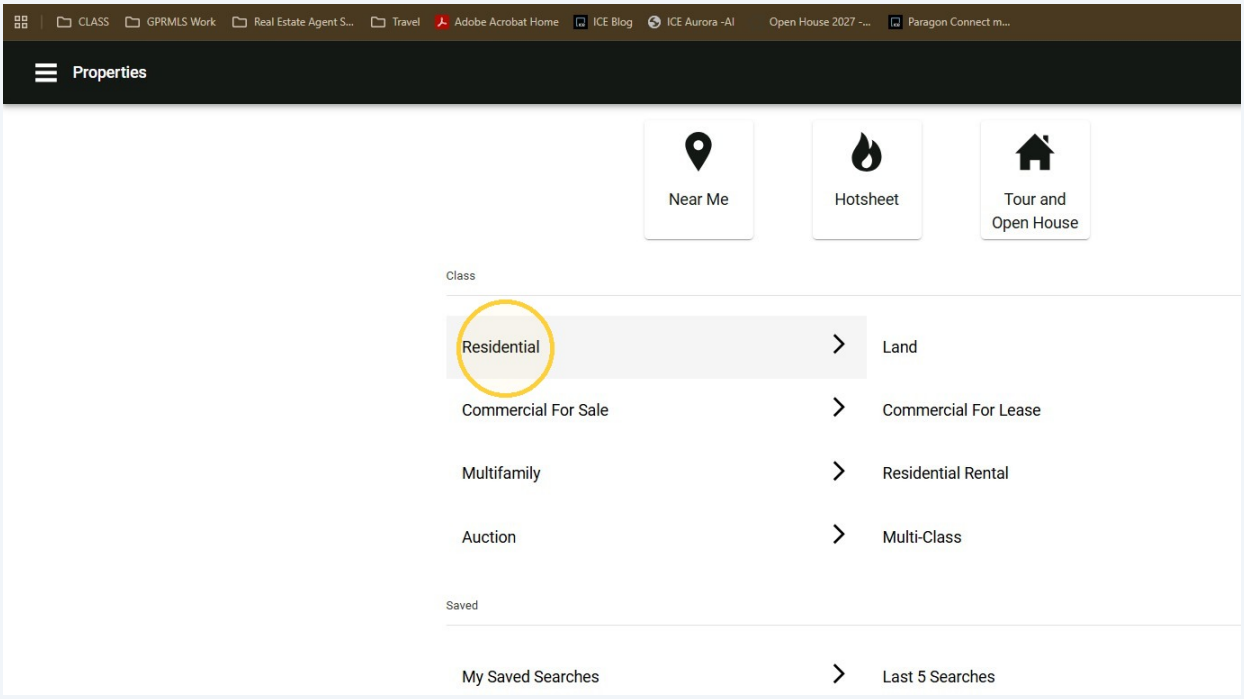
1 Open the main navigation menu using the menu icon.



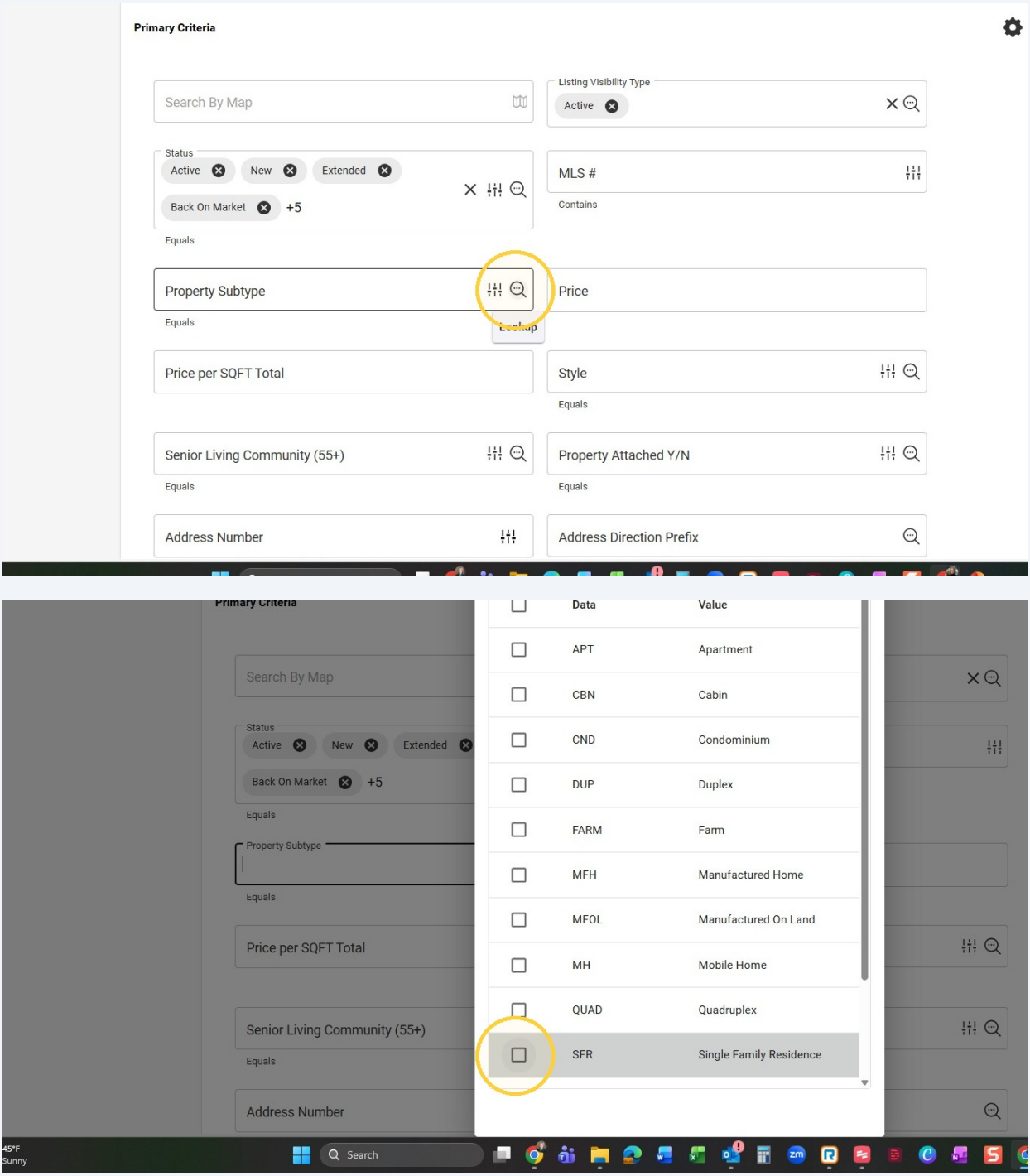
2 Click "main menu"

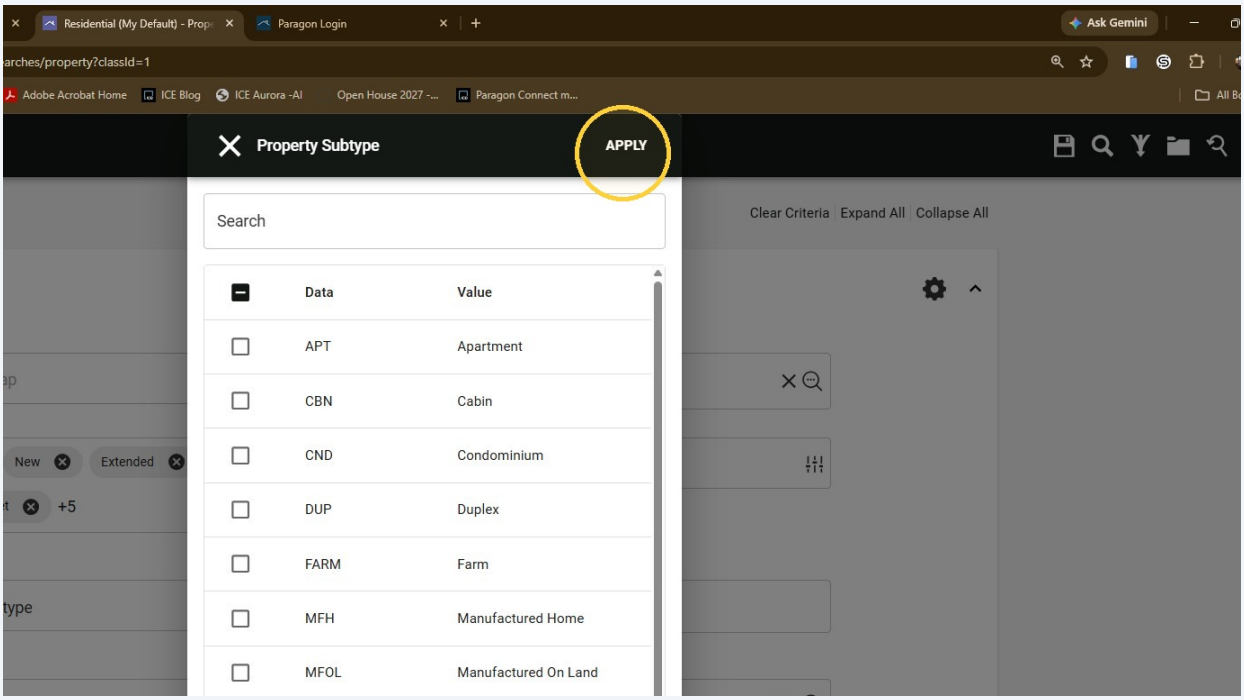


3 Click "Residential"

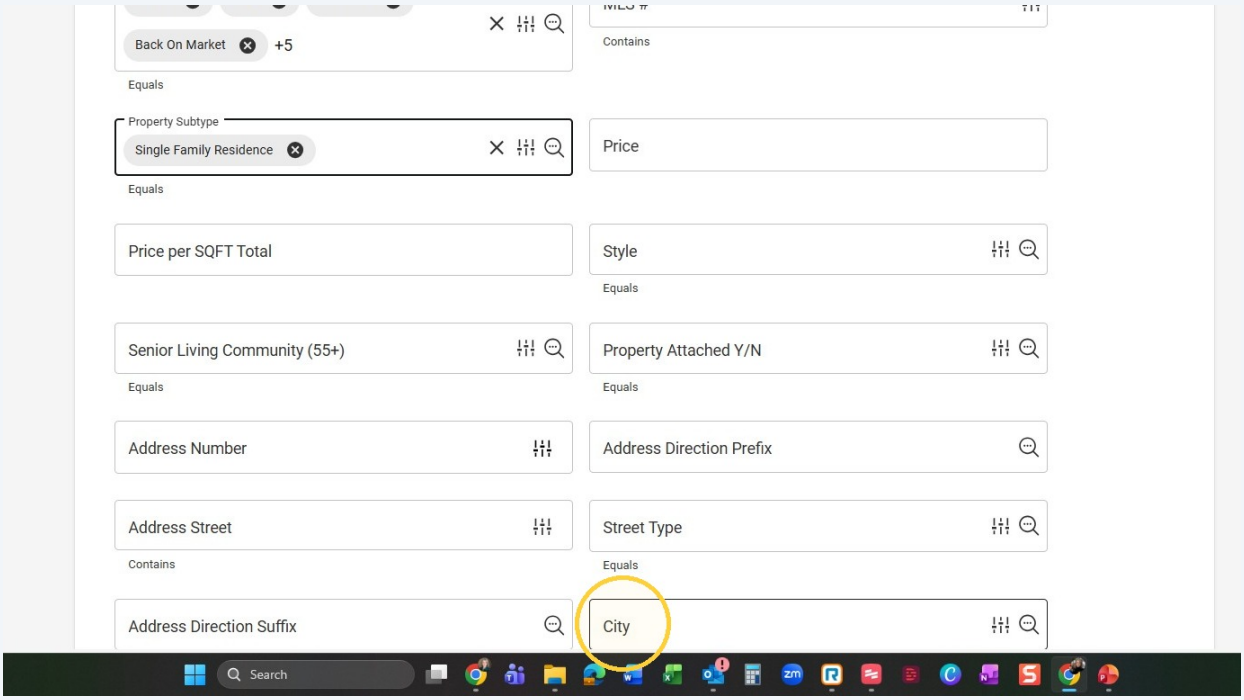


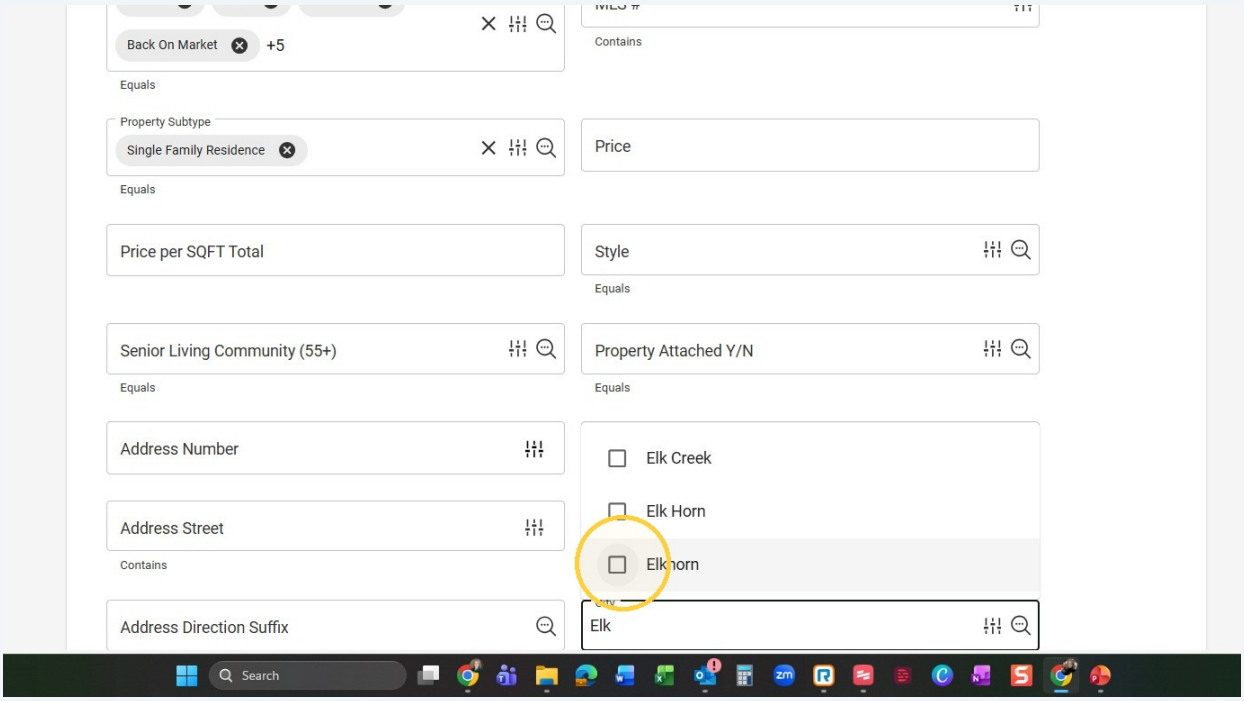
4 Begin completing the criteria that you want. I began with Property Subtype lookup, select Single Family Residence, and apply the selection.



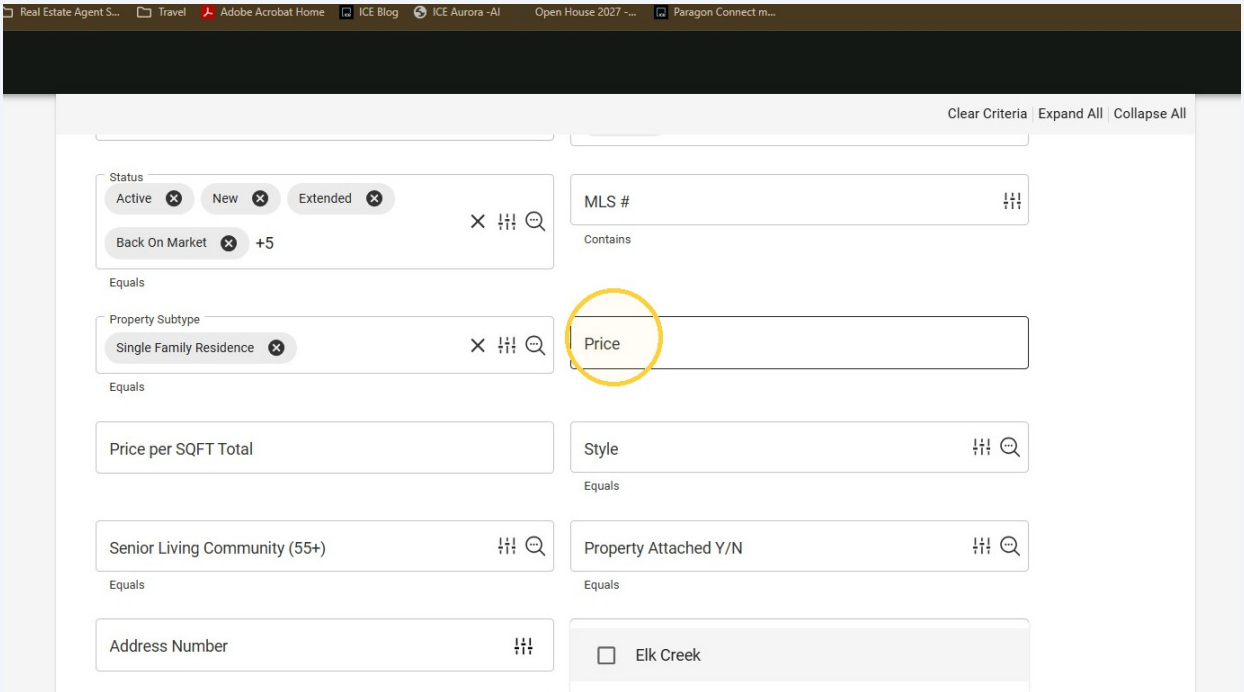


5 I built my search to search Elkhorn

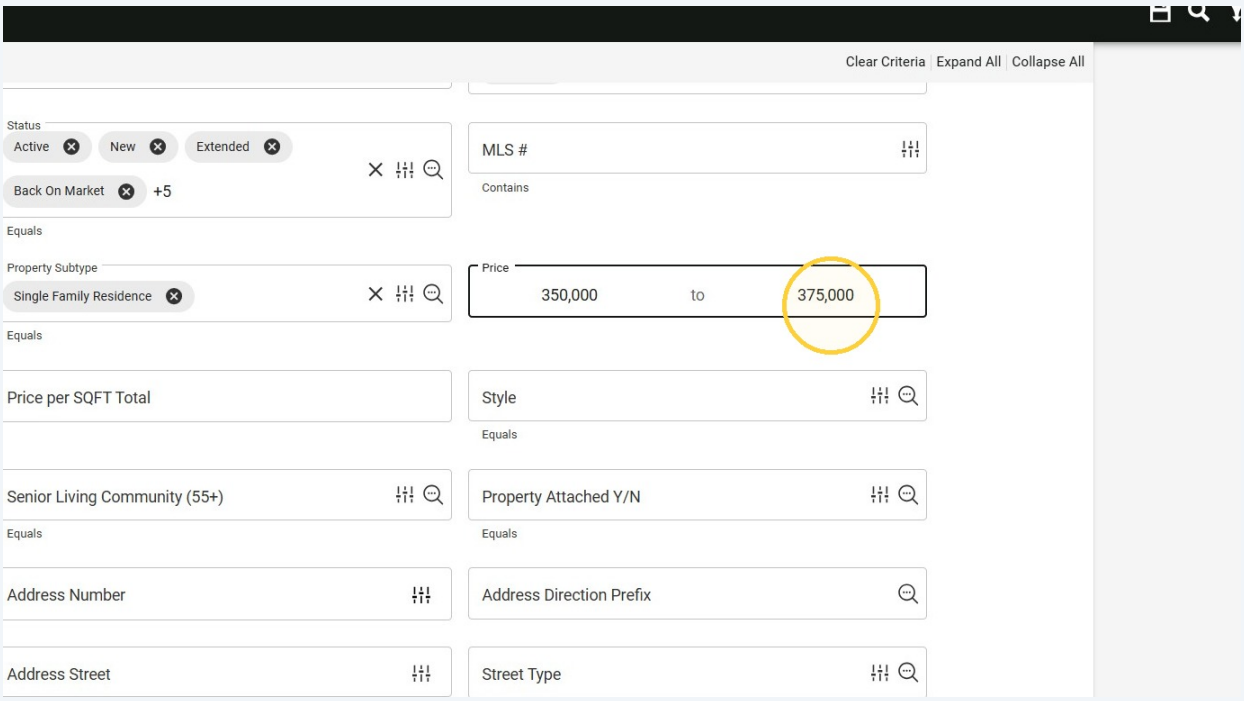




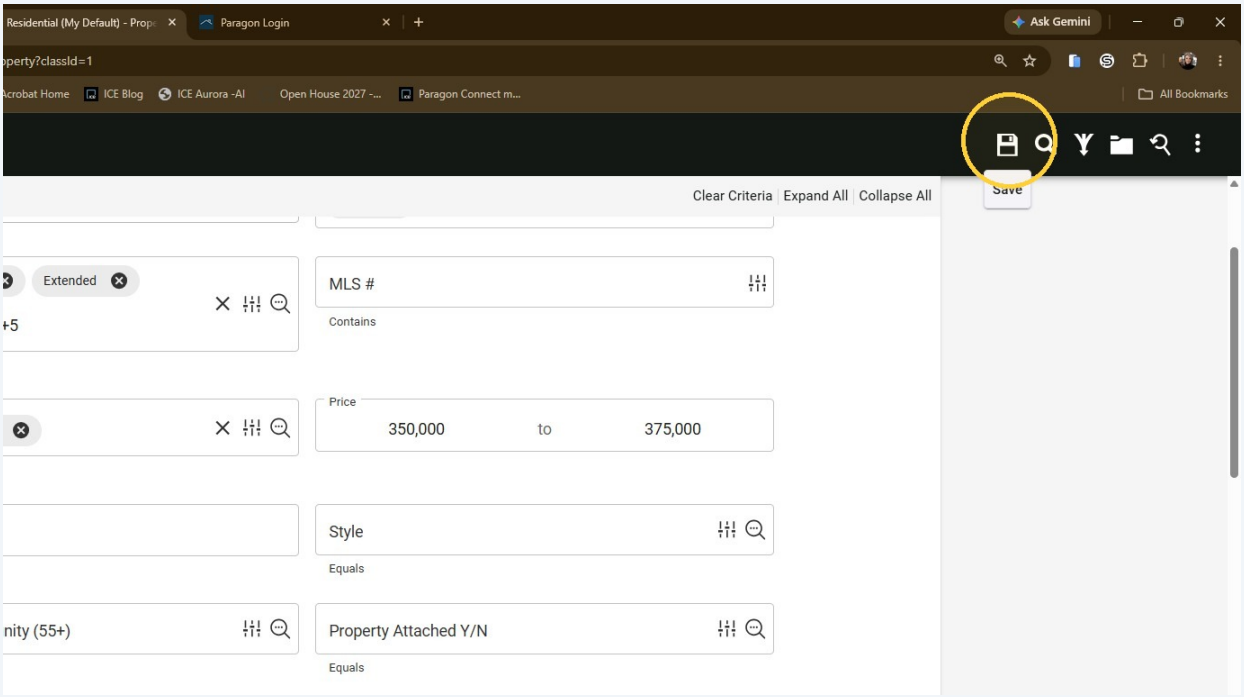
6 Enter a minimum price in the Price field.



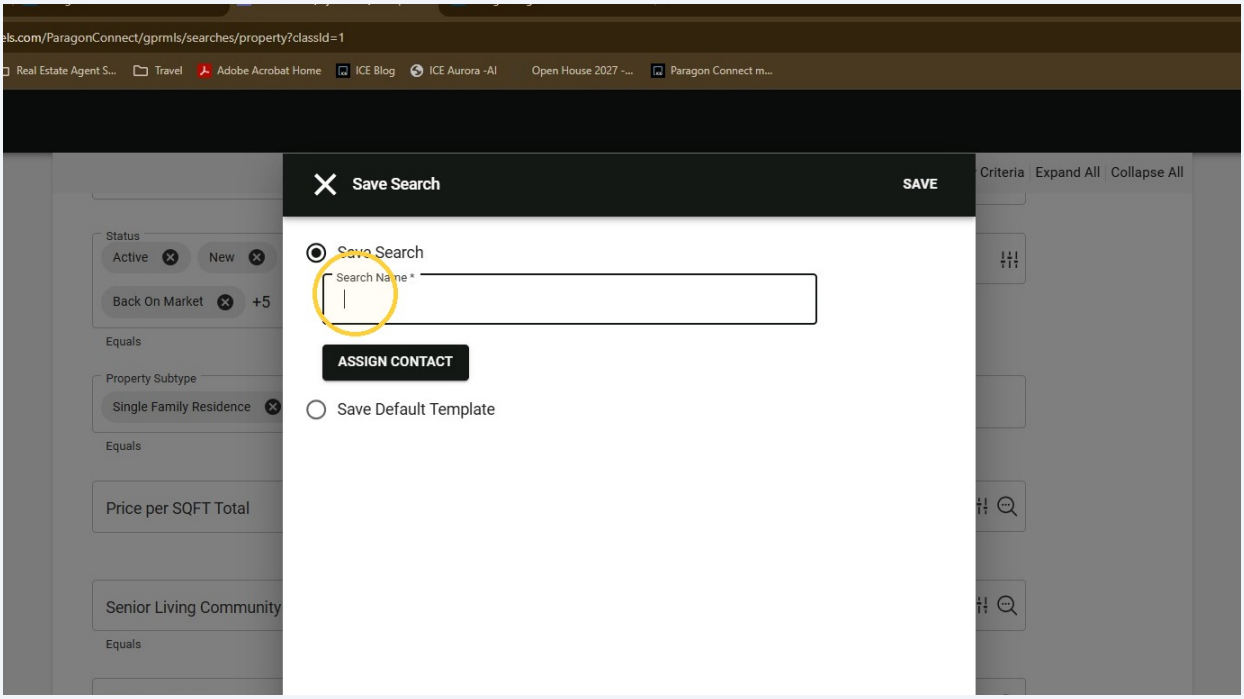
7 Enter a maximum price in the Price field.



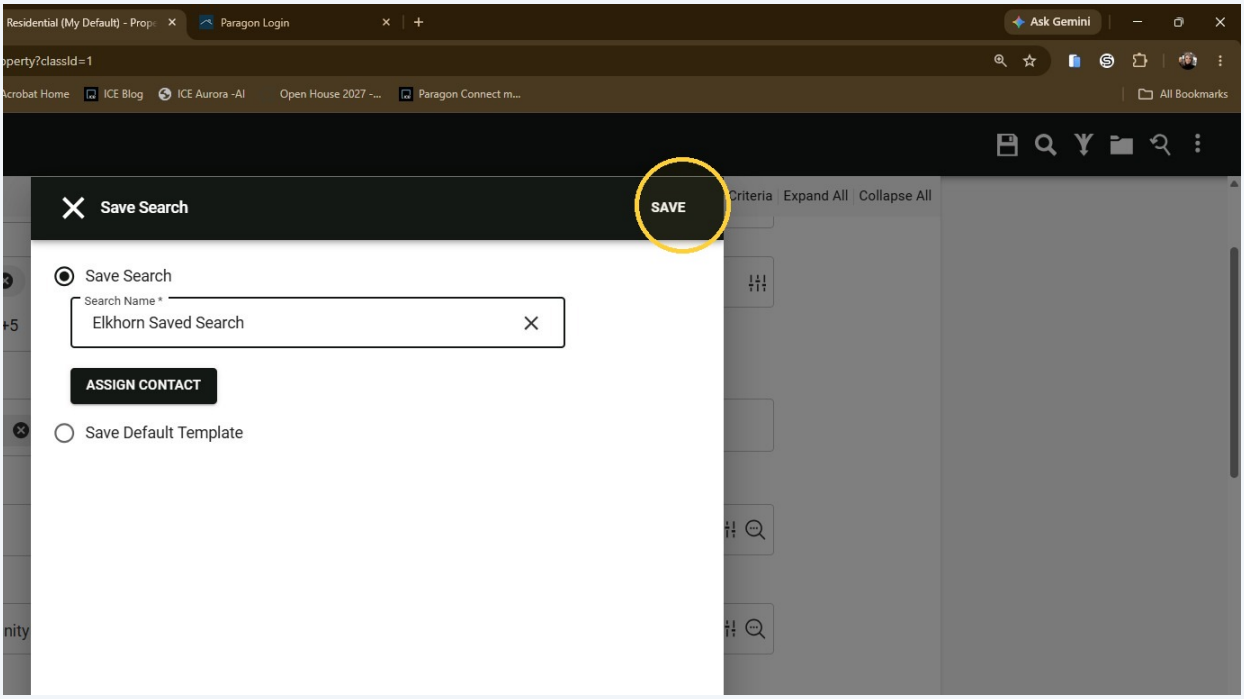
8 Click "Save" once you have selected the criteria you want



9 Enter a name for your search in the Search Name field.

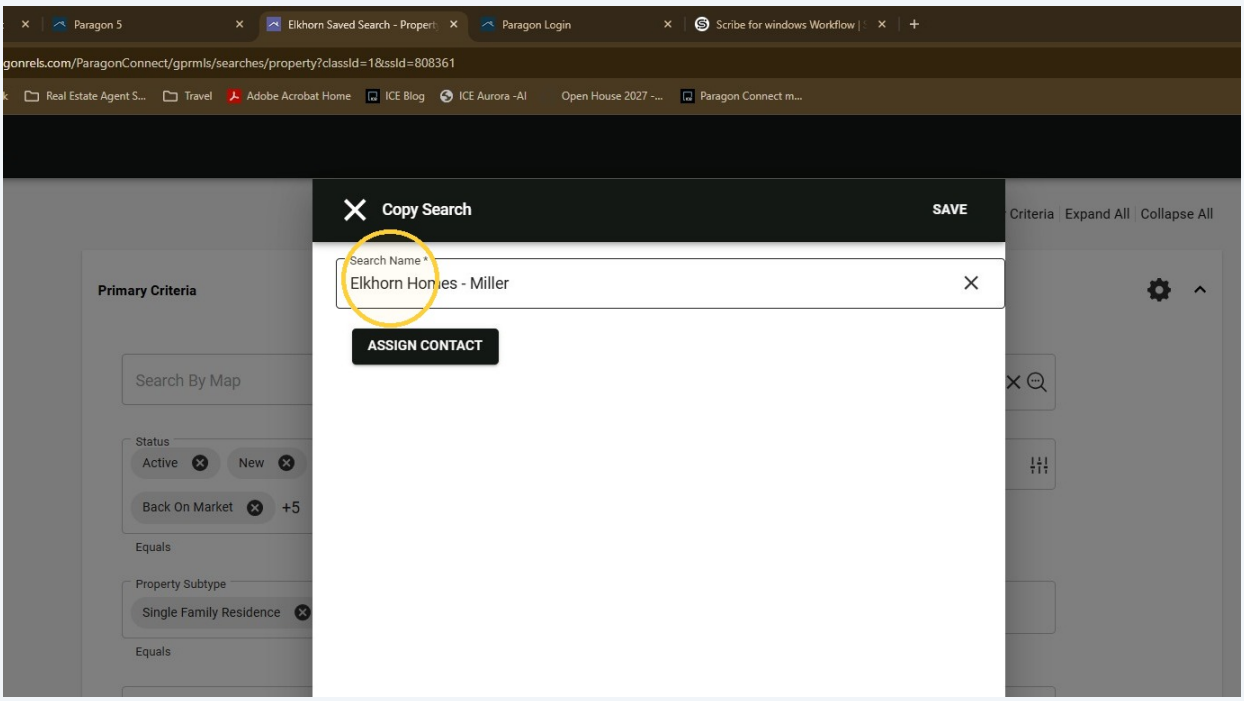


10 Click "SAVE"



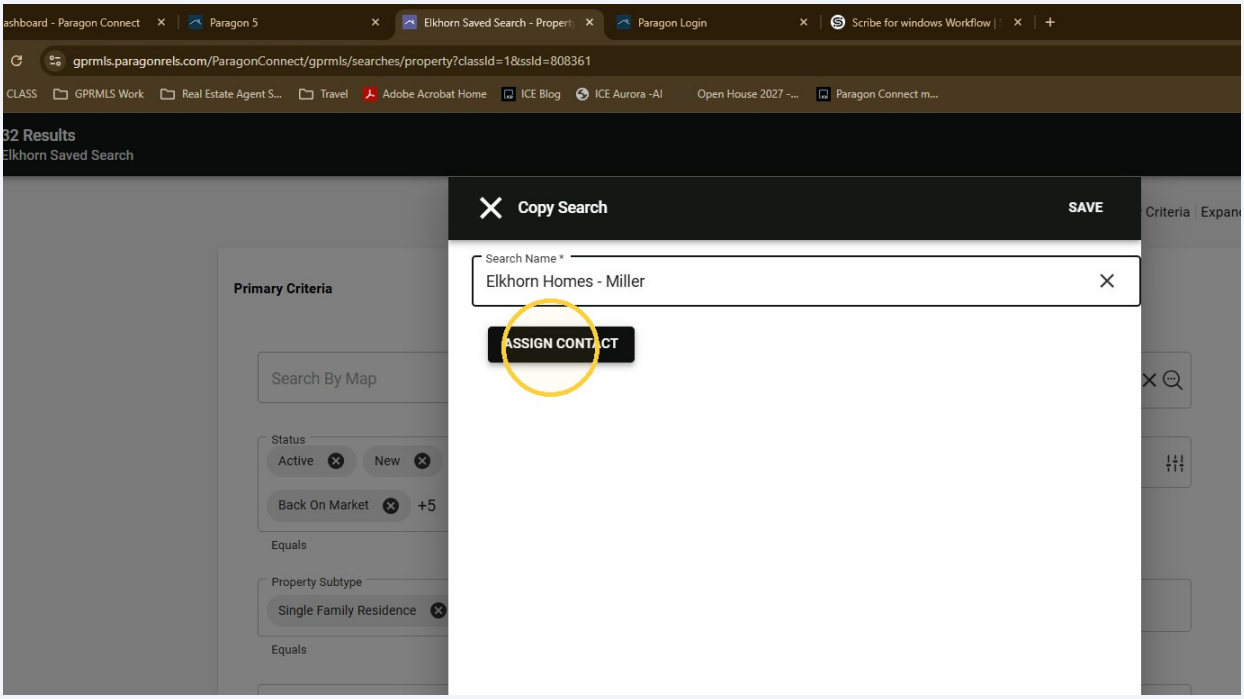
Paragon Connect - Saving a Contact to Your Saved Search

11 Name Your Search

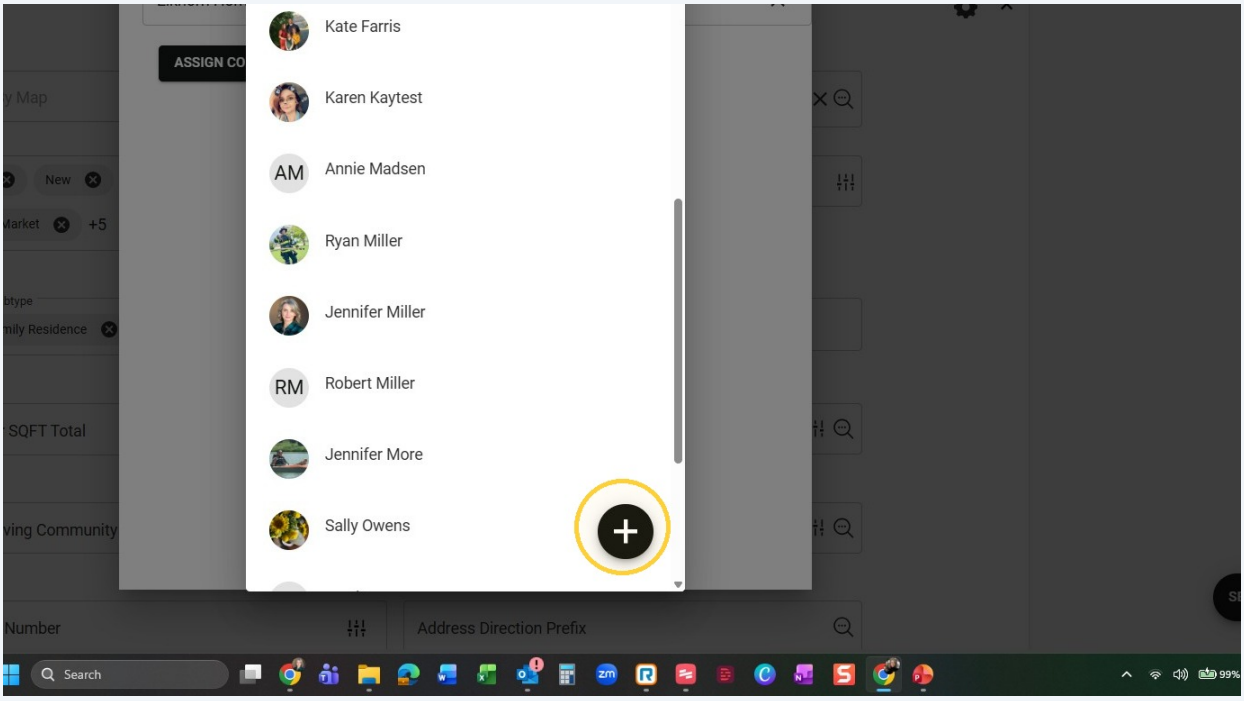


Contact Assignment

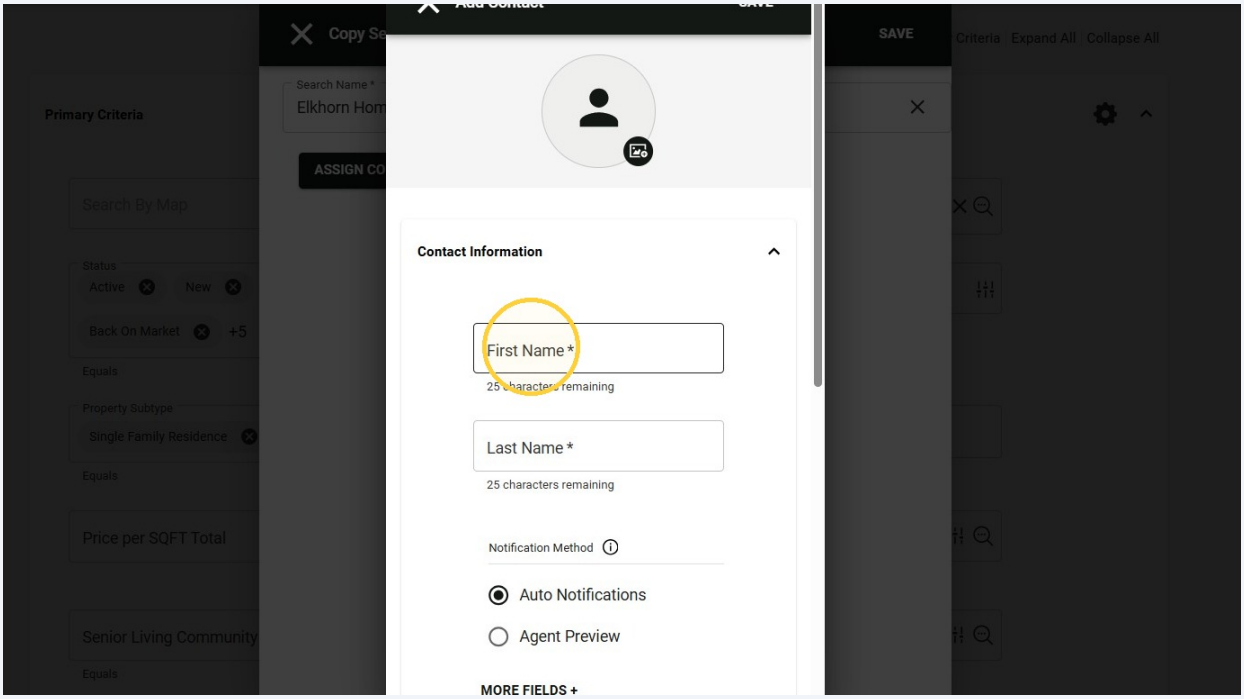
12 Click "ASSIGN CONTACT"



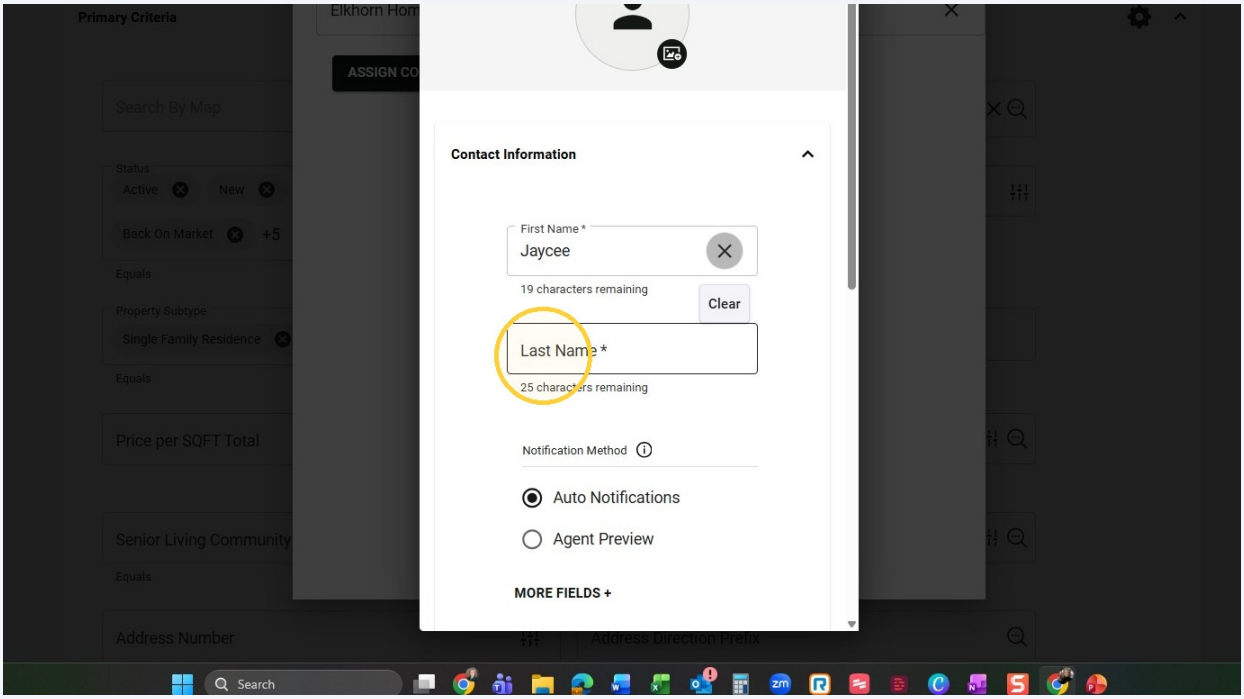
13 You may choose your contact, or if you haven;t added them yet- you may do it here by clicking the add contact (+) button in Choose Contact(s).



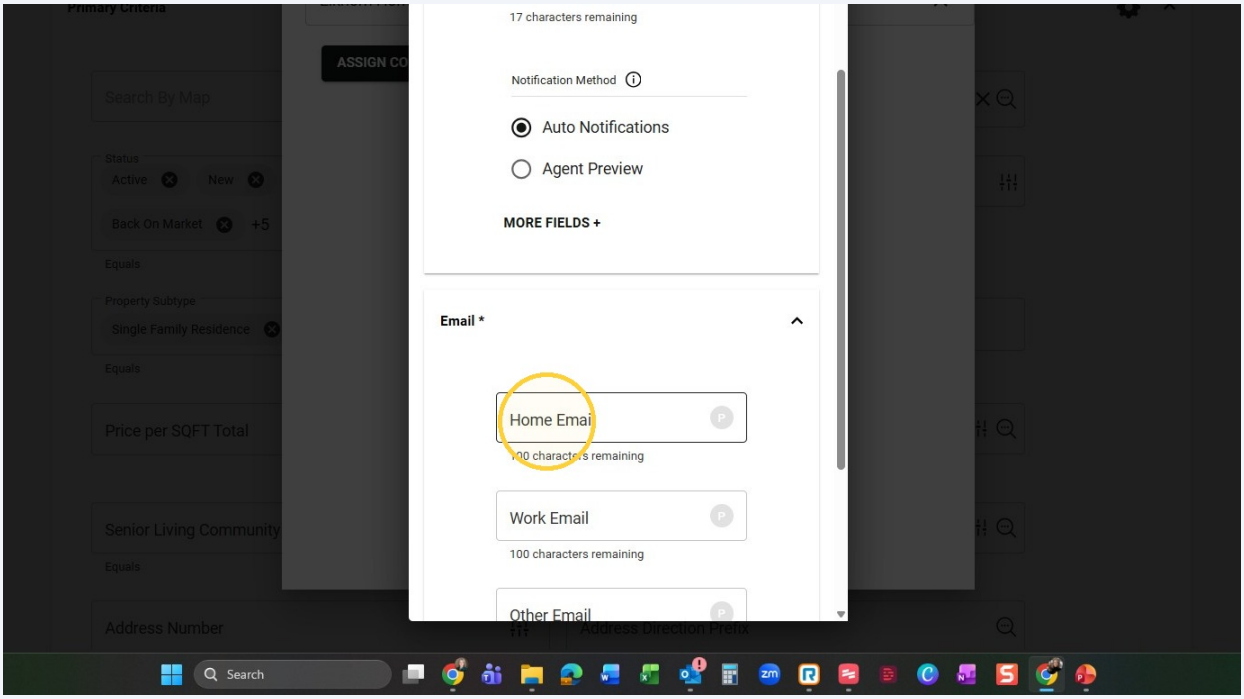
14 Click "First Name"



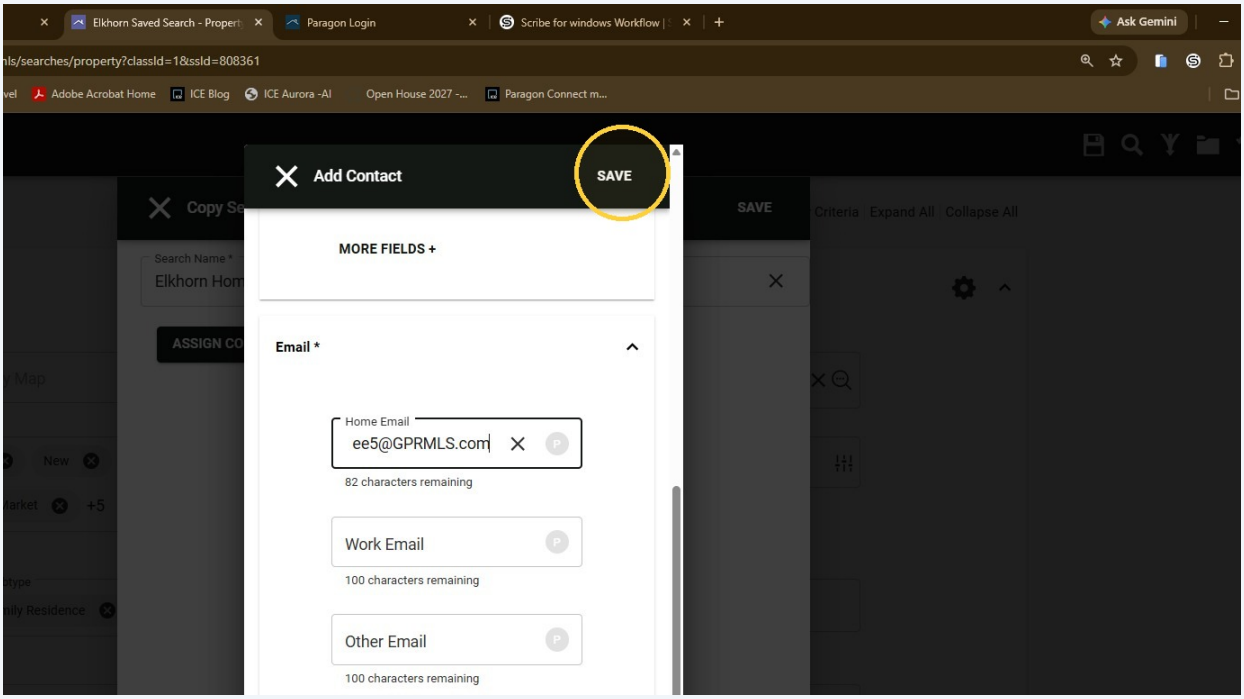
15 Click "Last Name"



16 Click "Home Email"

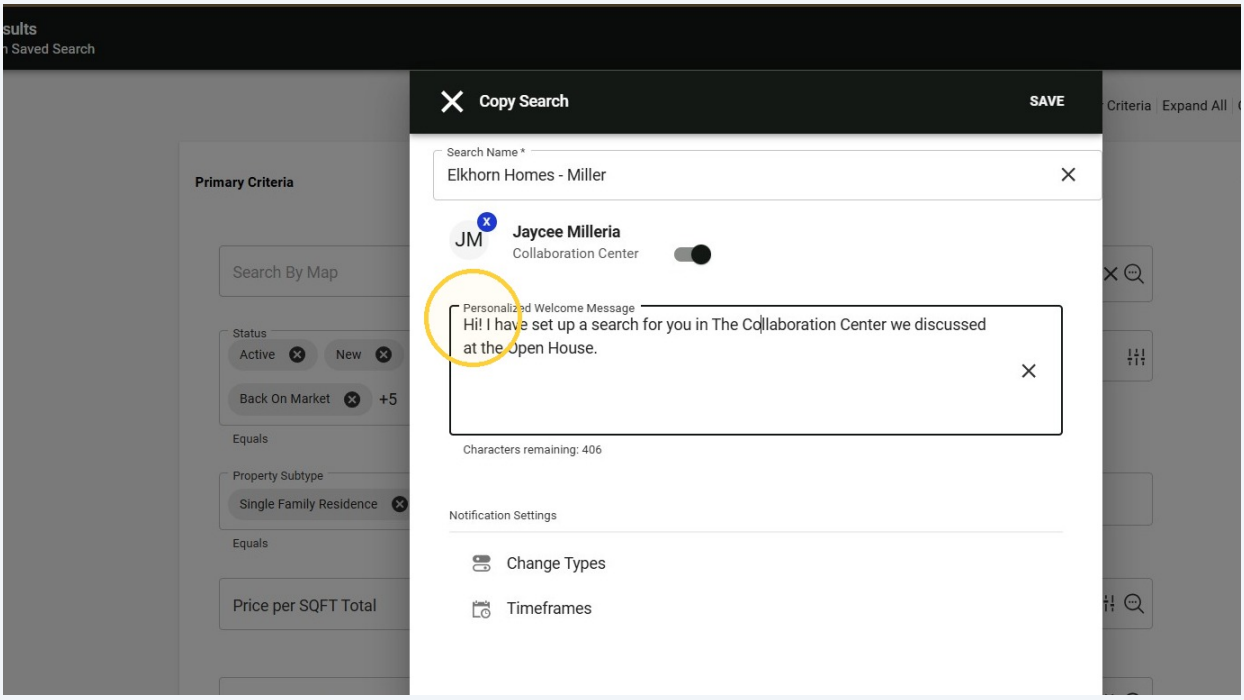


17 Click "SAVE"

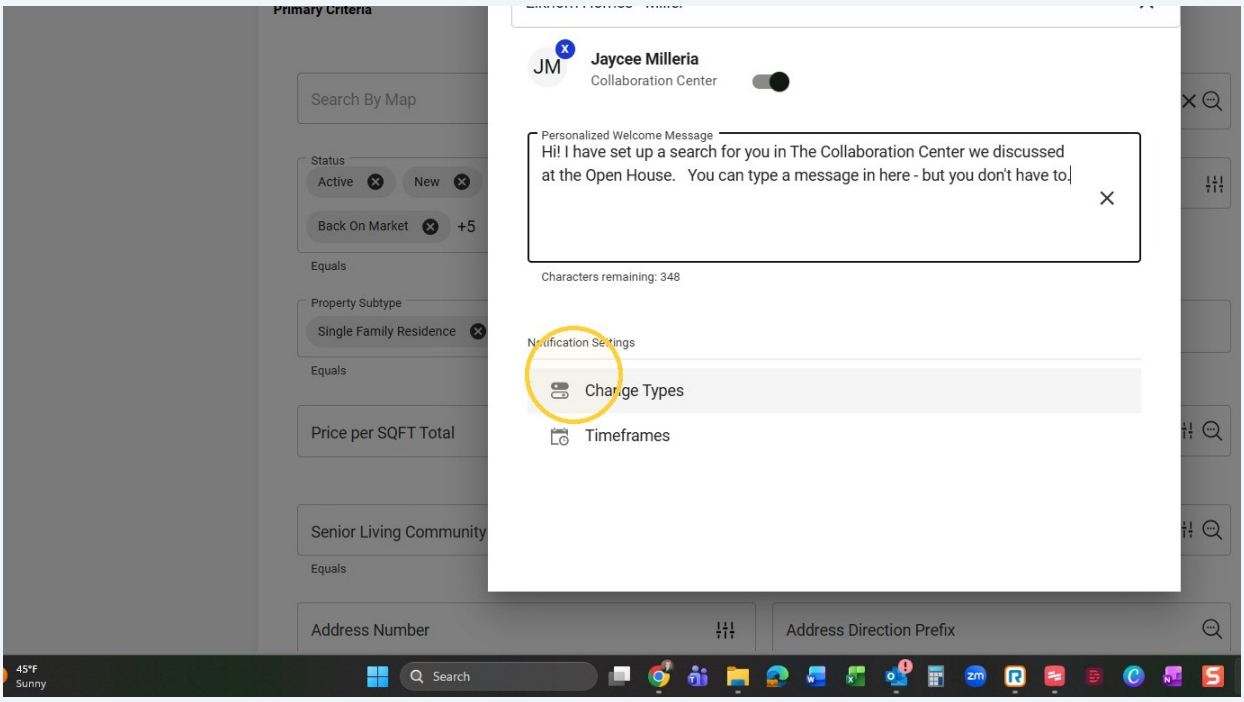


Message and Notifications

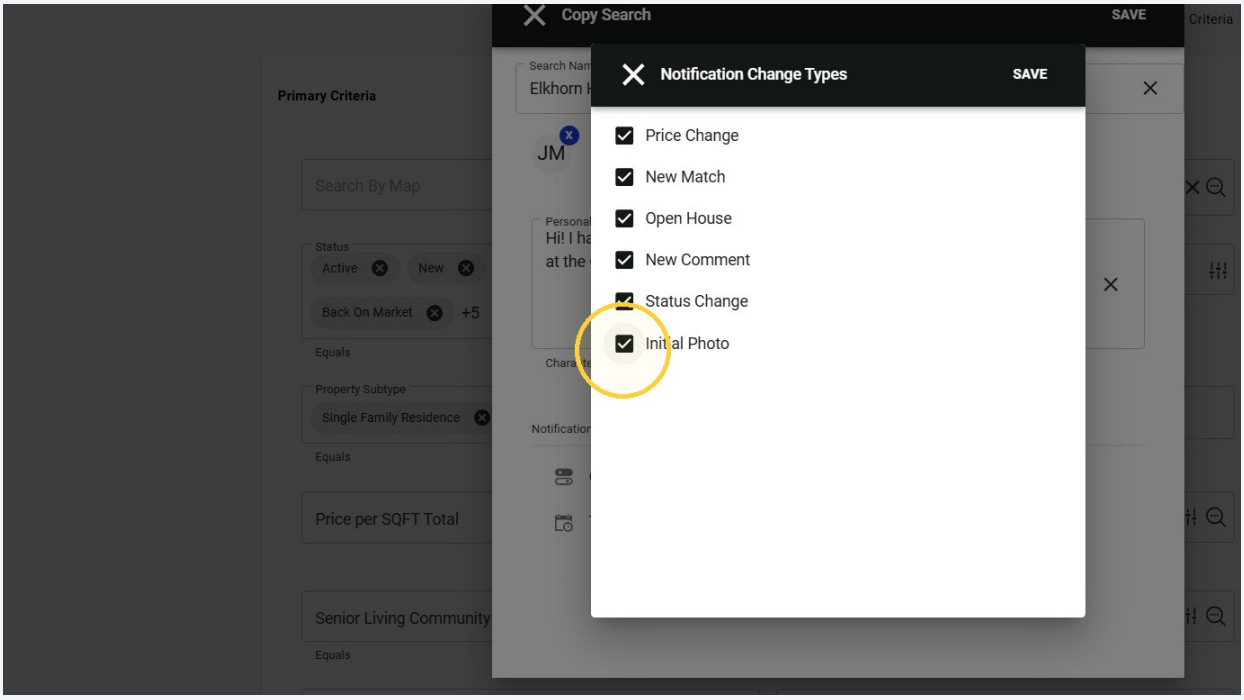
18 You may type a message in the "Personalized Welcome Message" field. You do not have to, Paragon has set up "Let's Collaborate! Your agent has created a search based on the criteria you provided."



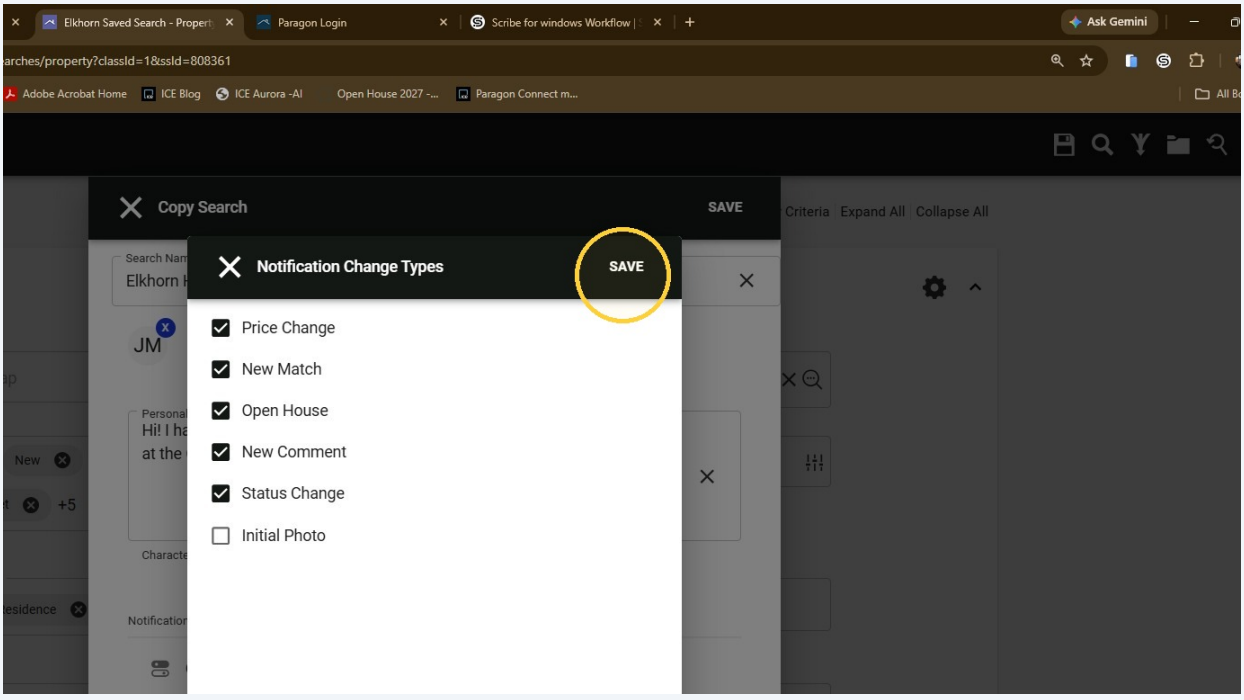
19 You then need to set up the Notification Change Types and Timeframes. Click "Change Types"



20 By clicking int he boxes- the client will receive a notification any time this event occurs that meets the criteria of the search. Unchecking the box -such as I did below- means they will not receive a notification for that unchecked event.

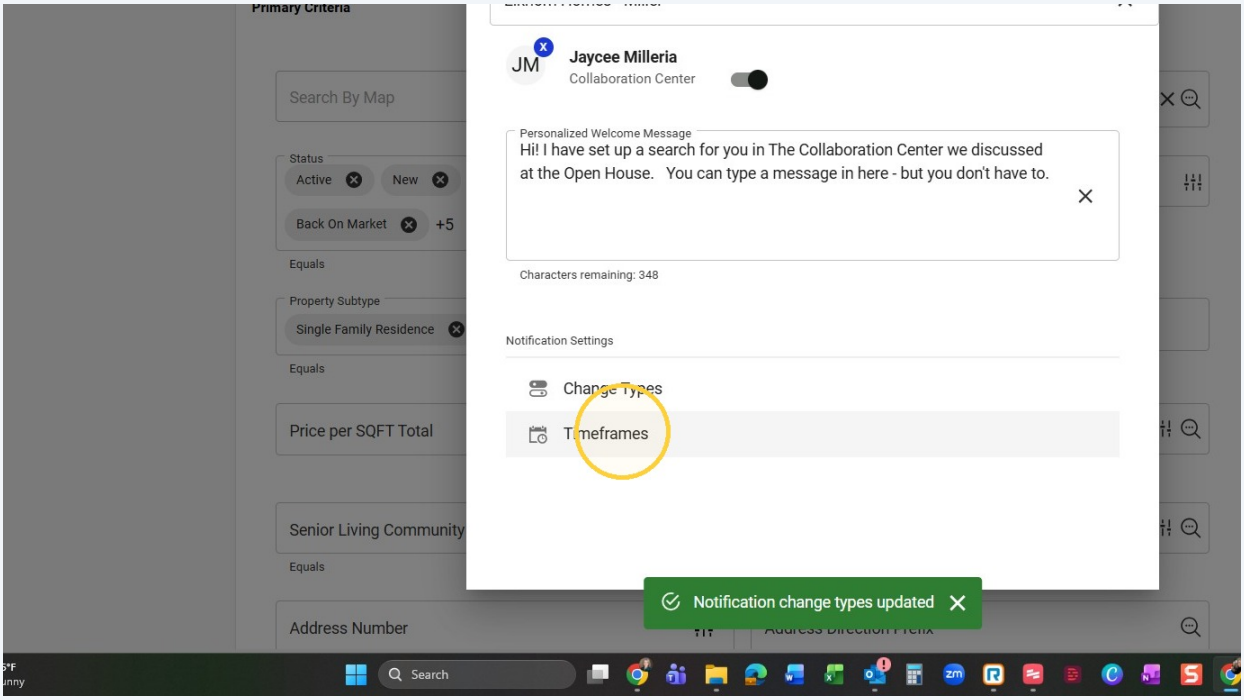


21 Click "SAVE"

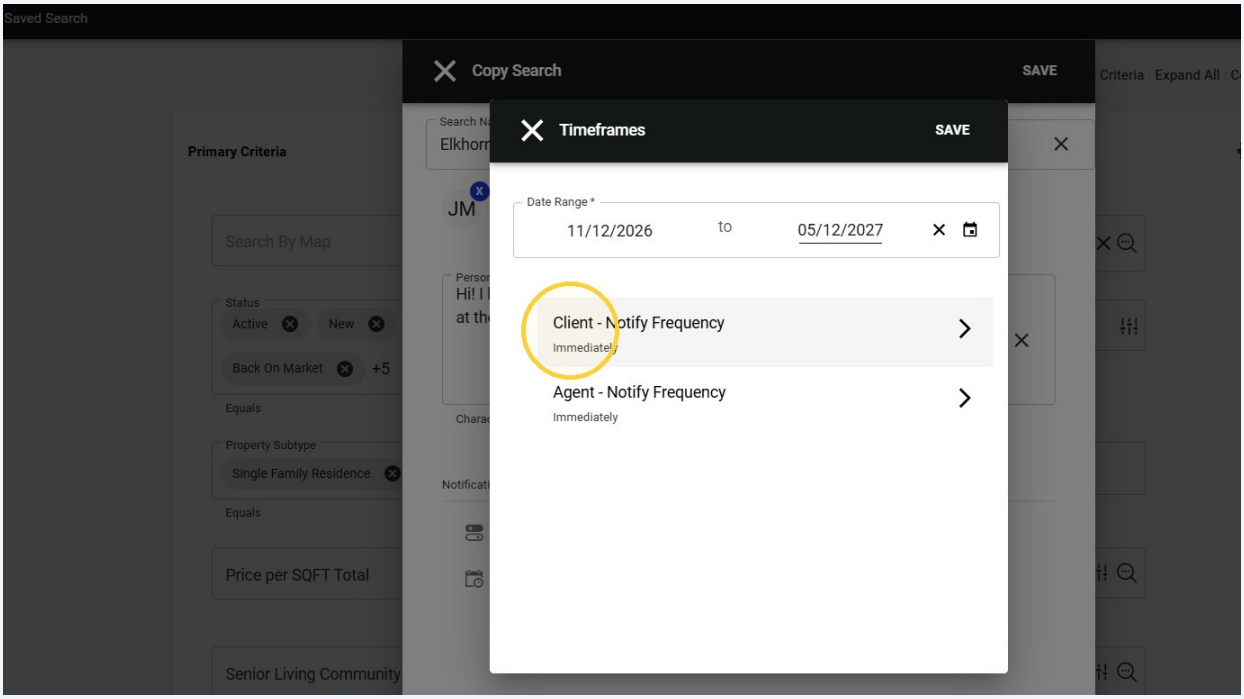


Notification Timeframes

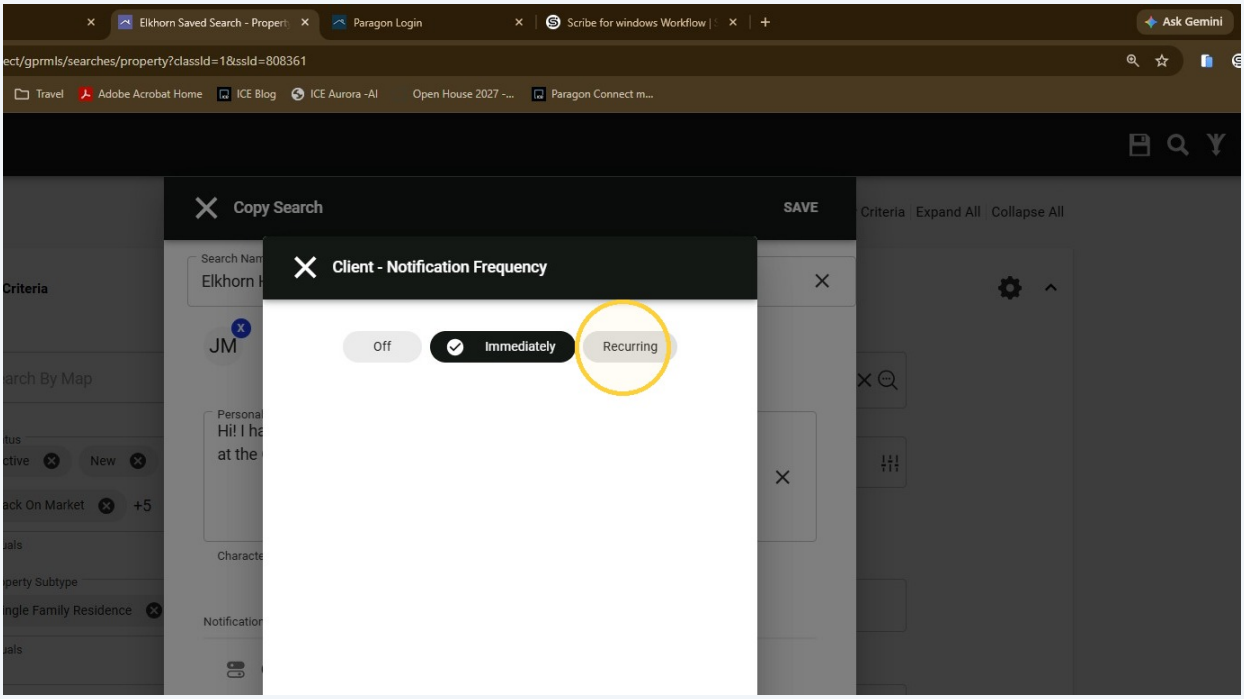
22 Open Timeframes.



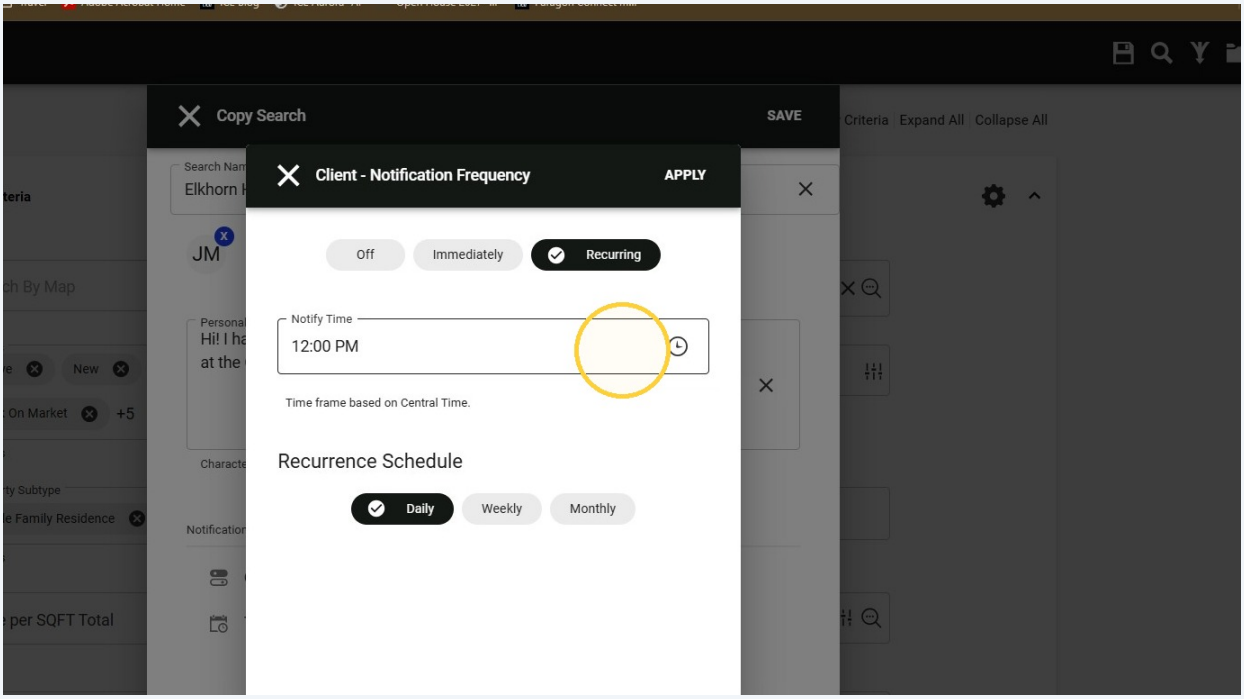
23 Click "Client - Notify Frequency Immediately"



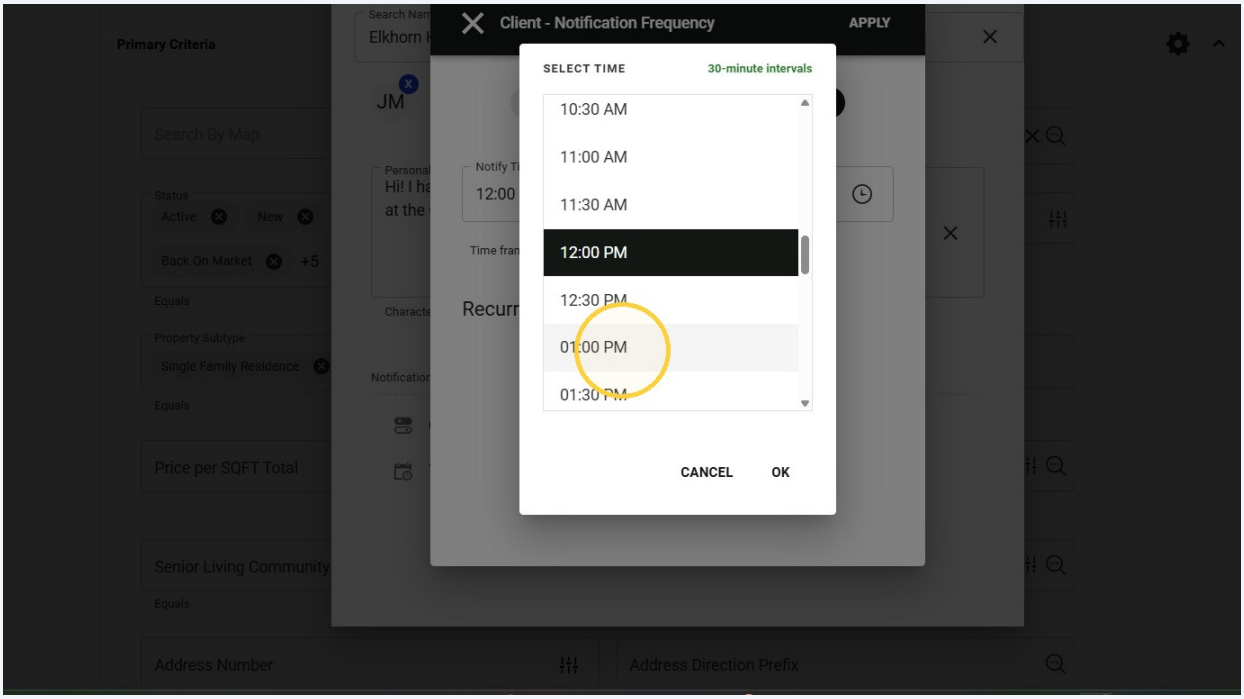
24 Or you can click "Recurring"



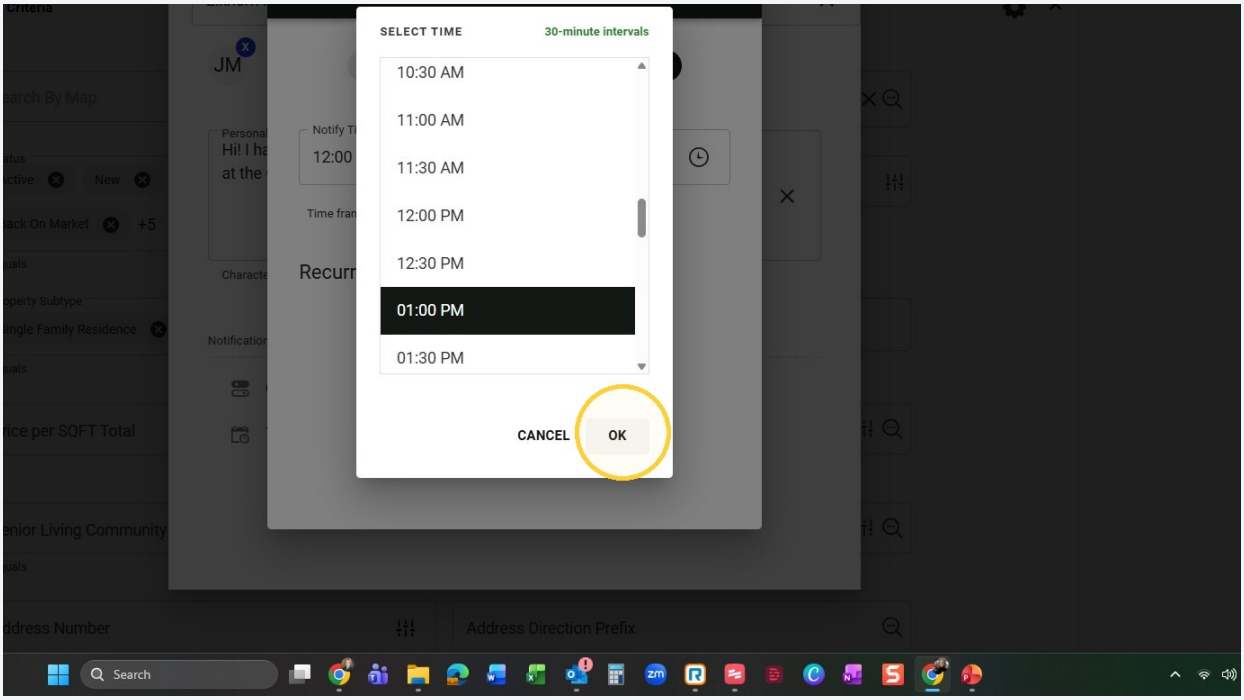
25 You can set up the time the notification will go out



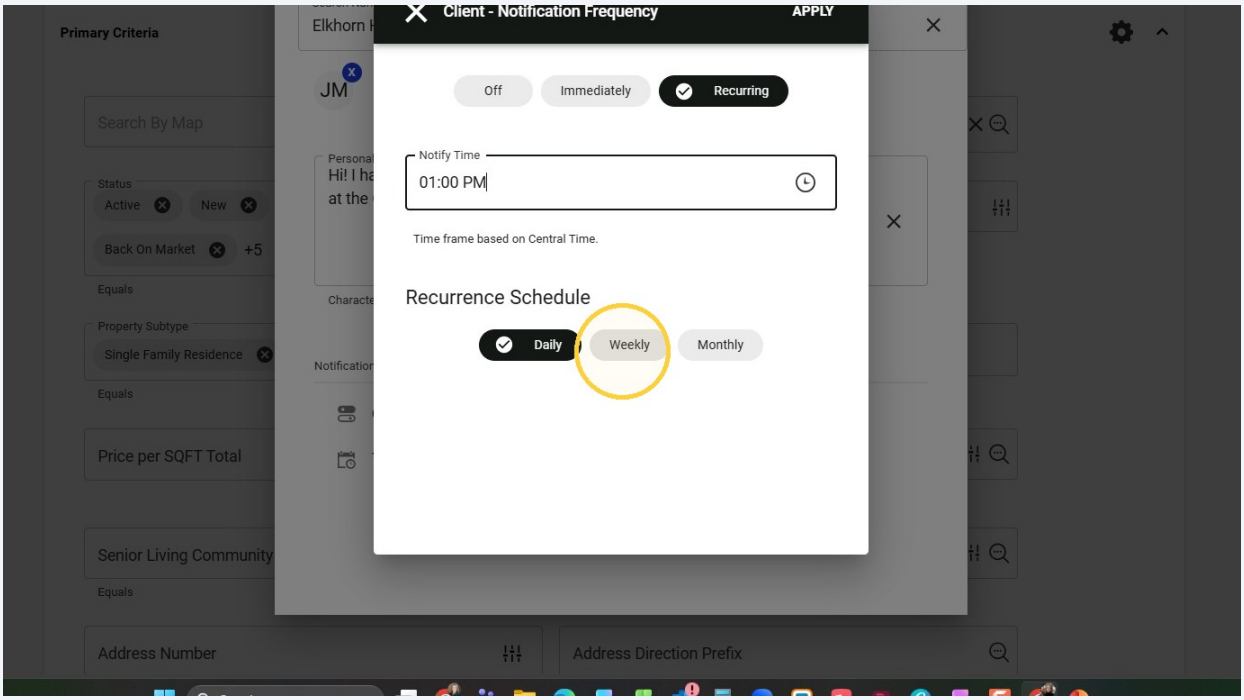
26 Click "01:00 PM"



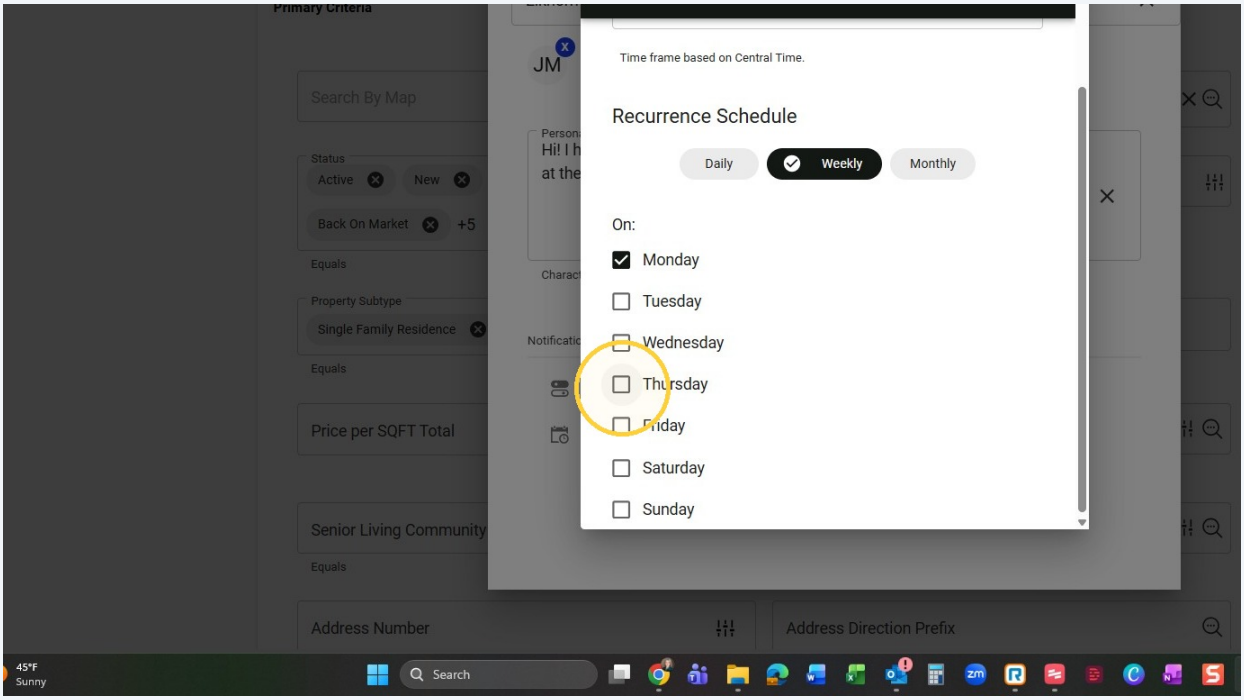
27 Click "OK"



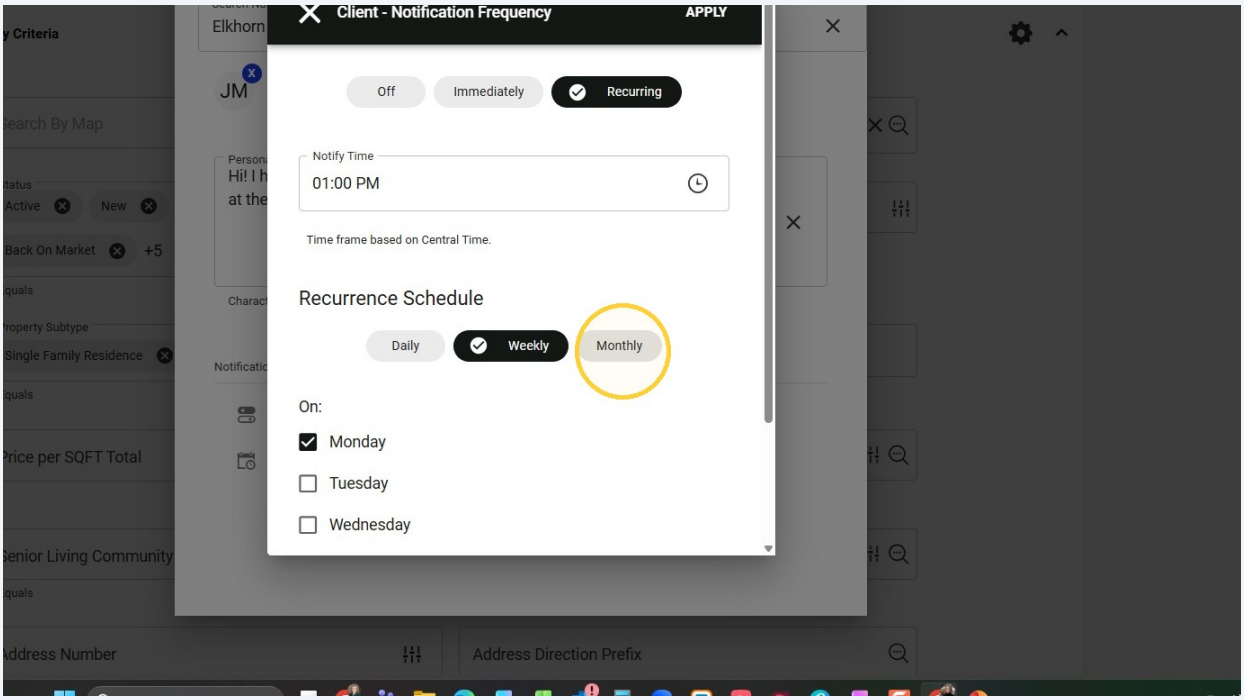
28 Click "Weekly" to choose a day of the week



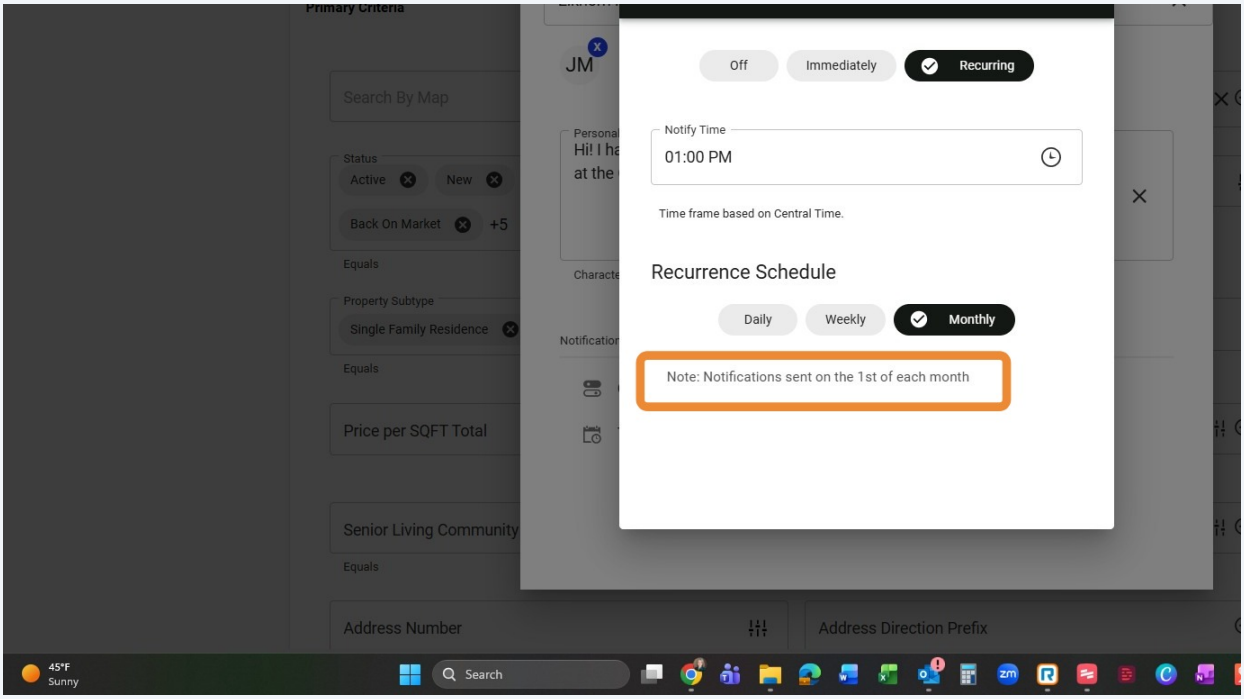
29 Click "Thursday" (or the day of the week you want the notification to go out)



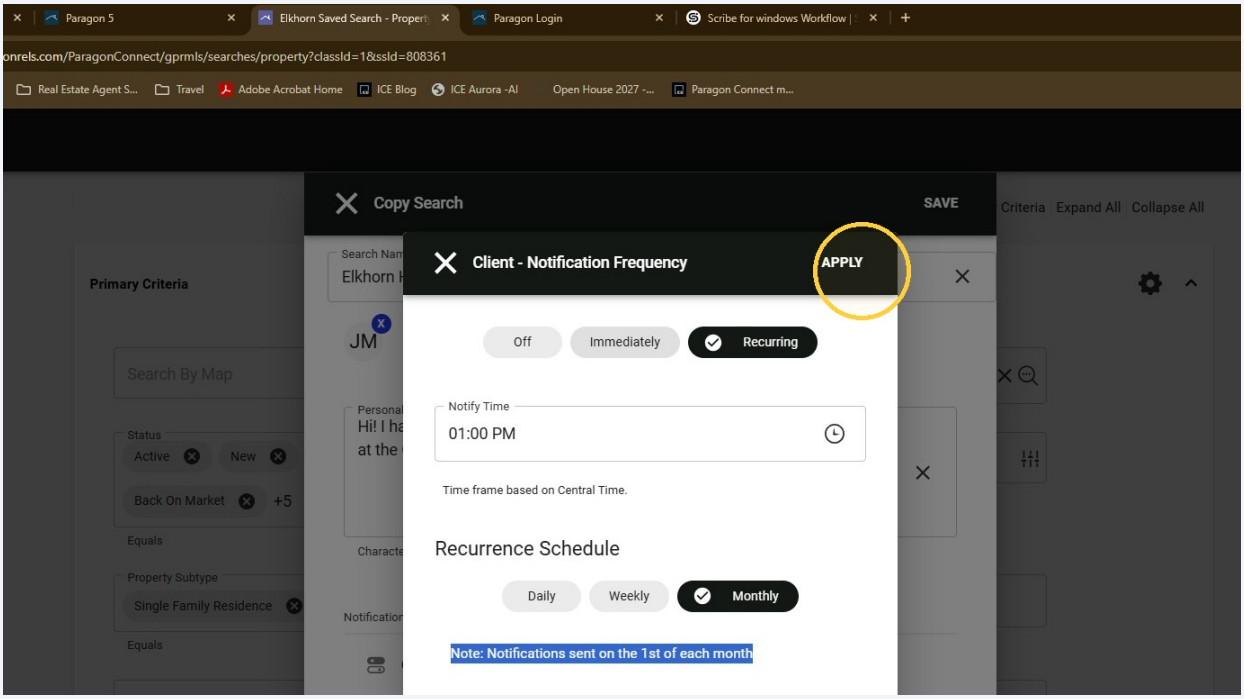
30 Or you may set it up "Monthly"



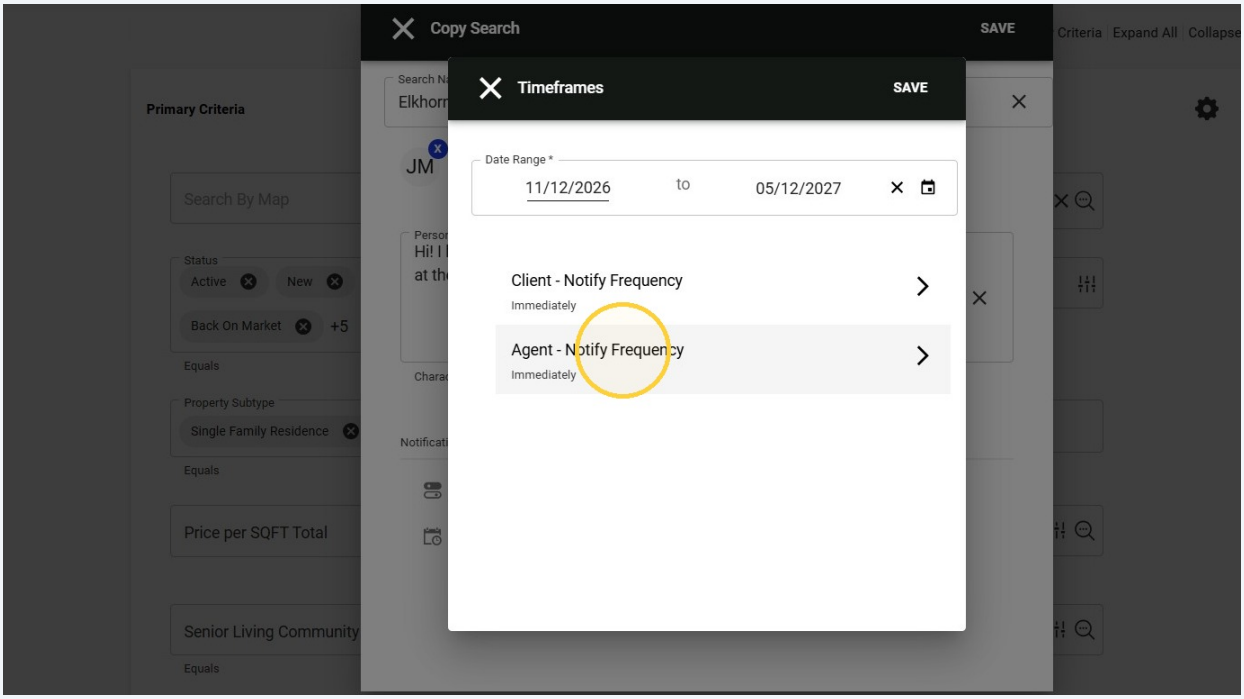
31 If you choose monthly, the notification will go out on the 1st of the month



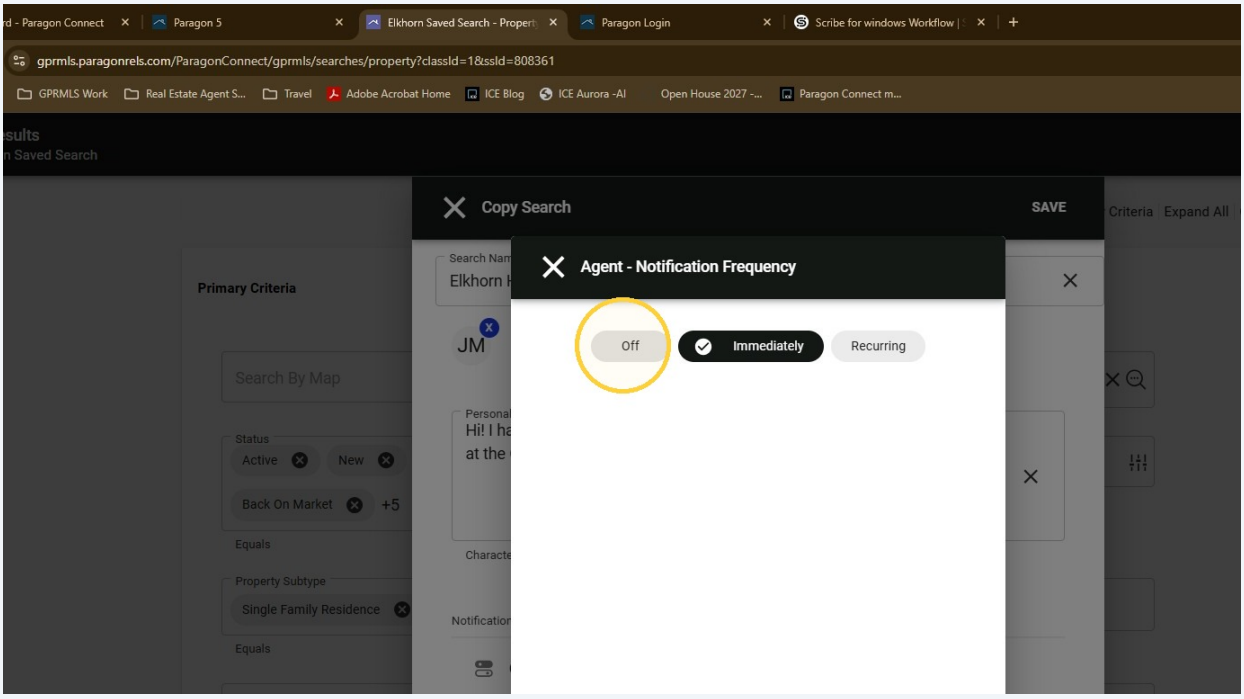
32 Click "Apply" once you have set the time and schedule



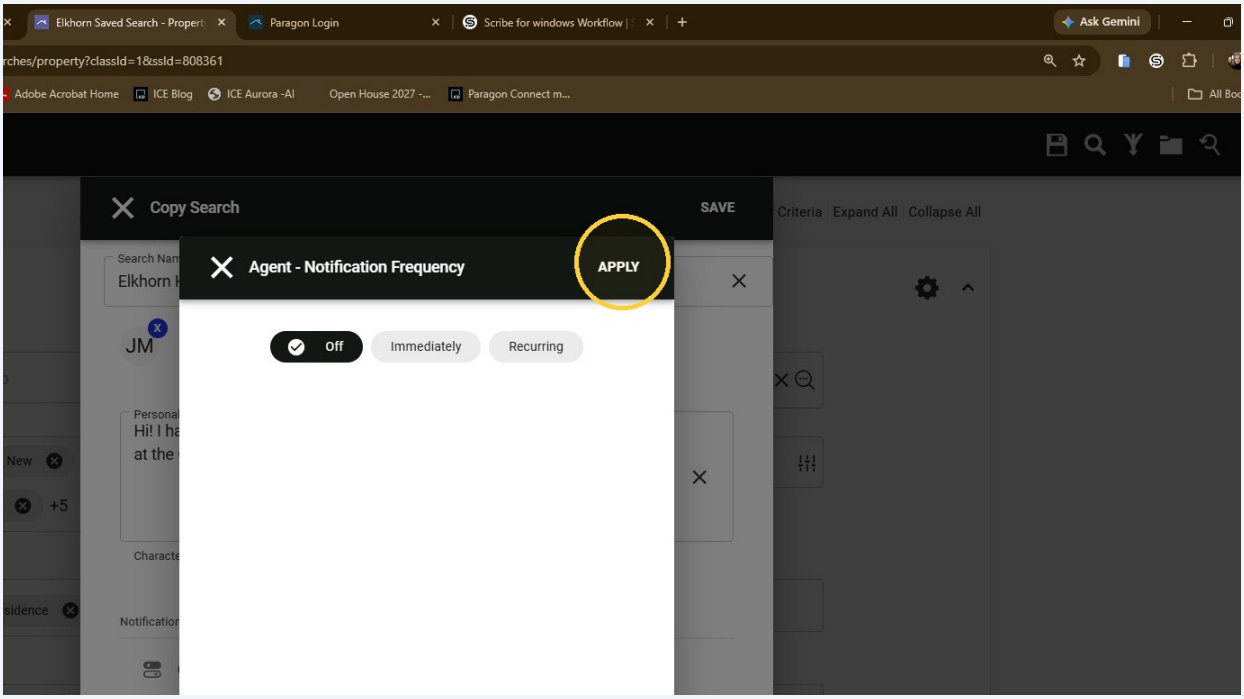
33 To yourself up to receive the notifications- it works the same way- just click the "Agent - Notify Frequency"



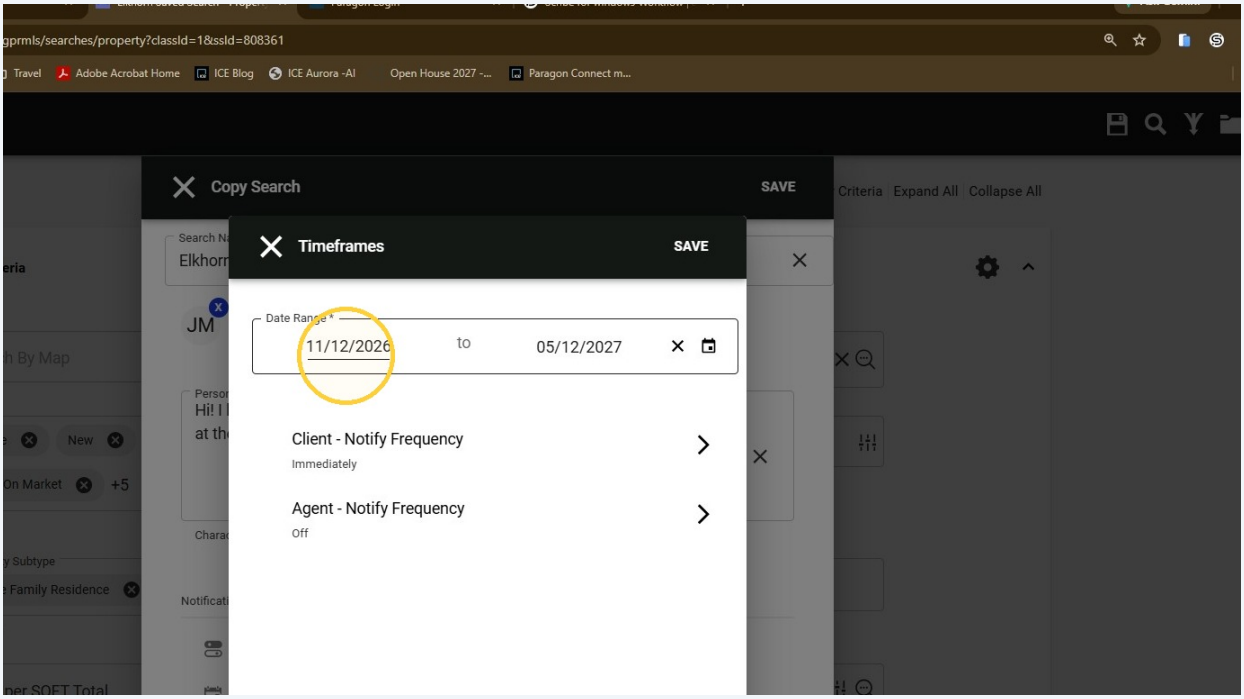
34 Click "Off" if you do not want to be notified.



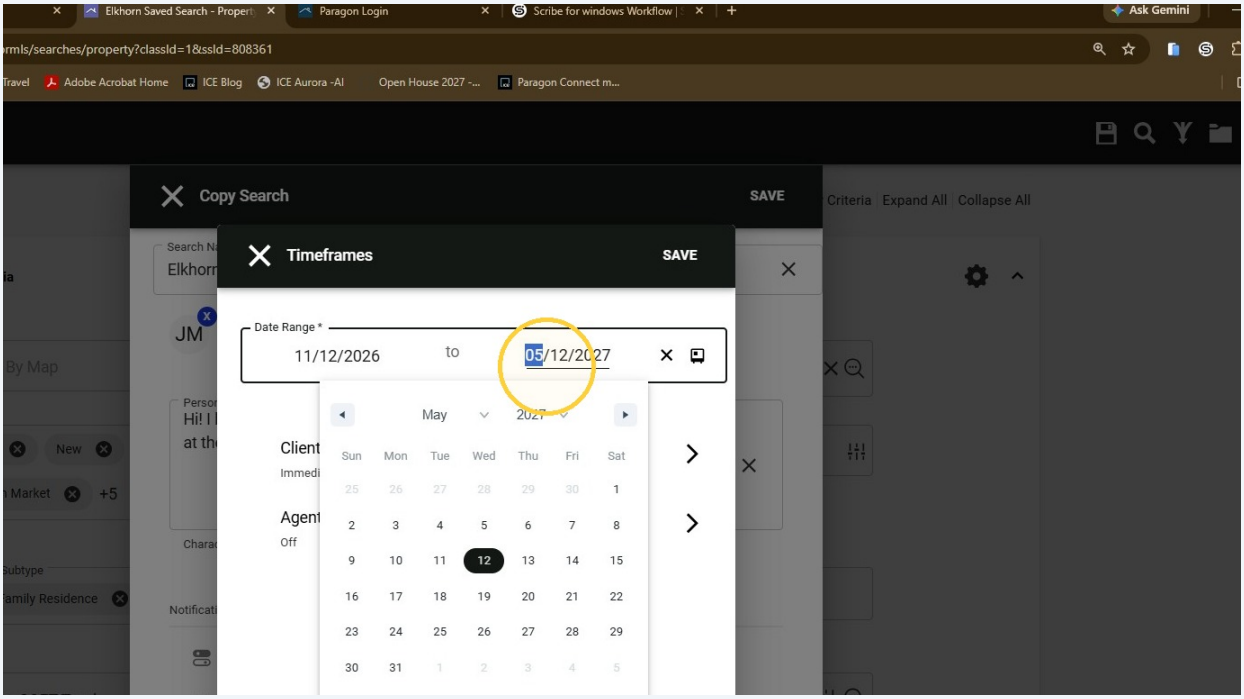
35 Click "APPLY"



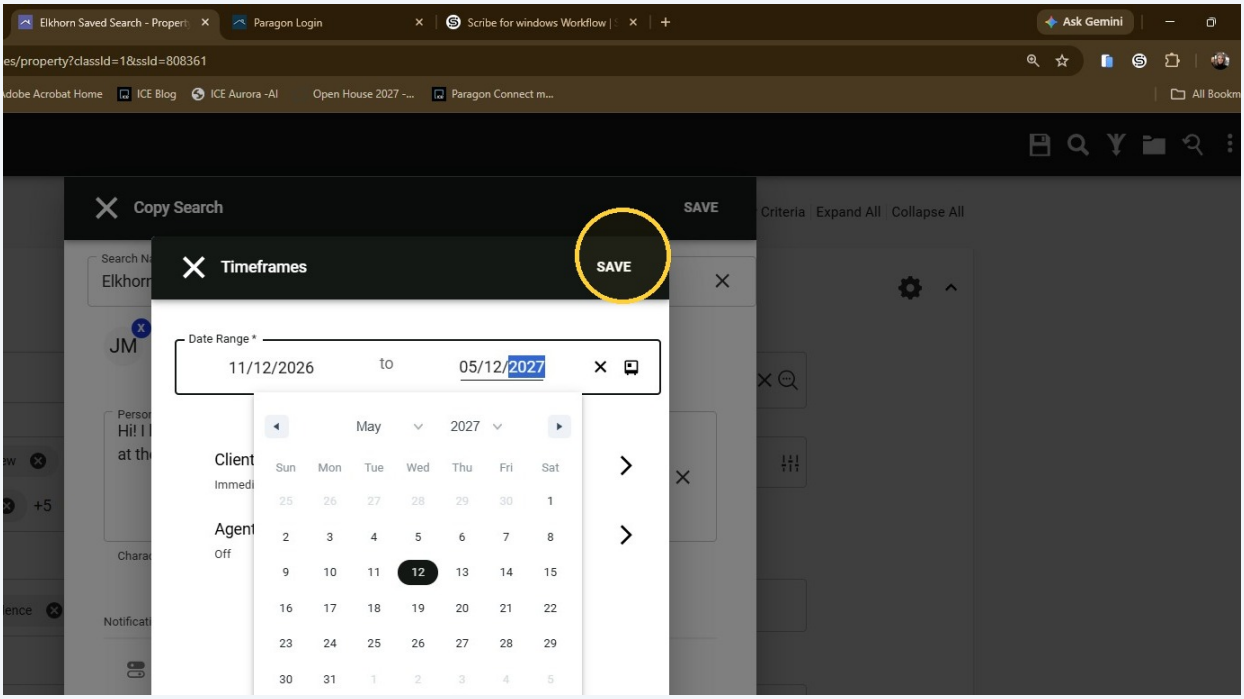
36 You can also set up the time frame you want the search to be set up for. You may always come back and update it when needed



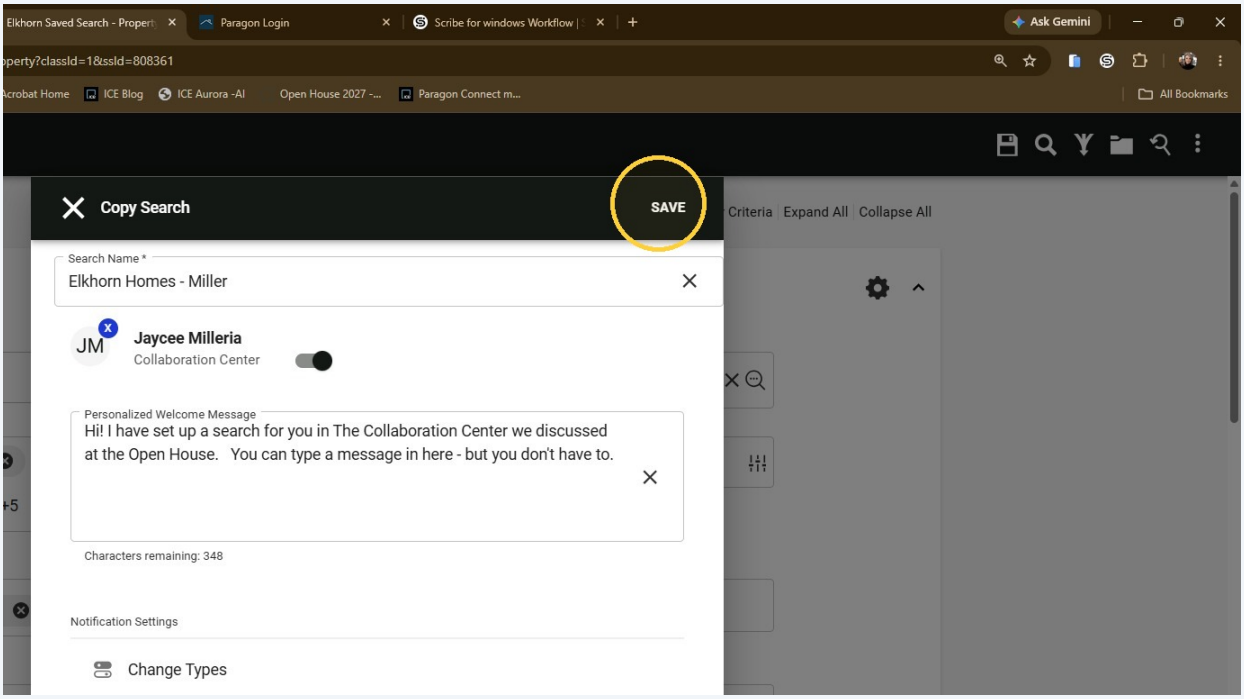
37



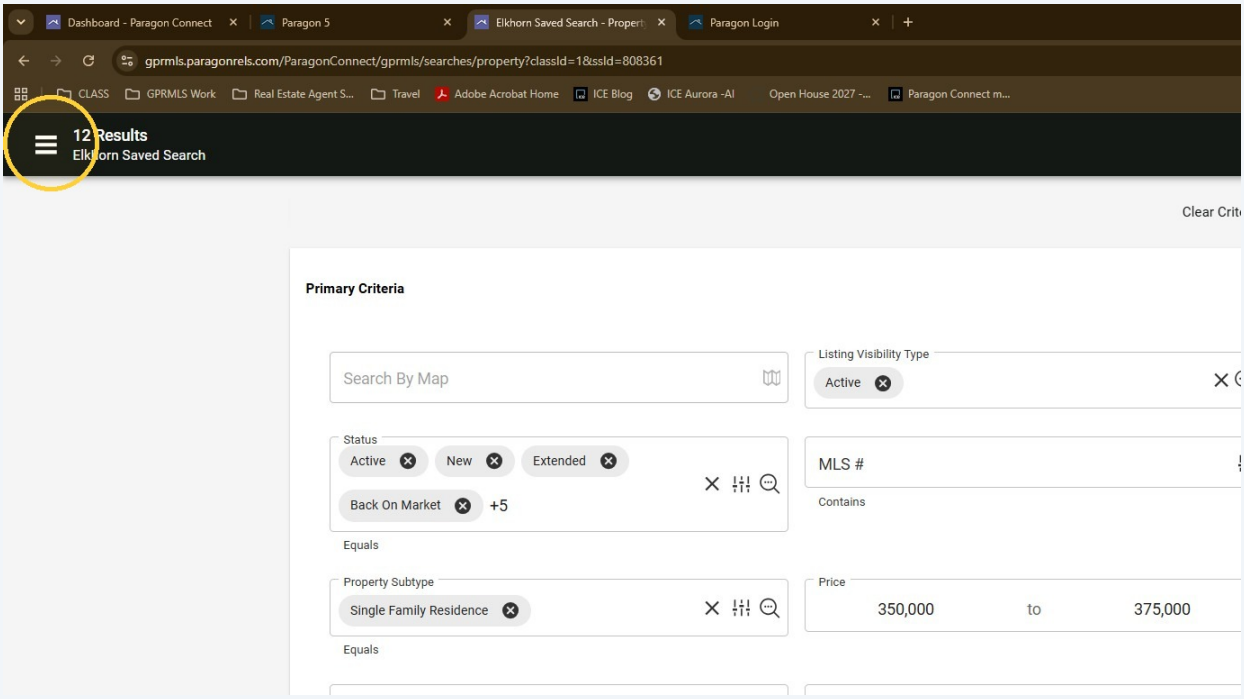
38 Click "SAVE"



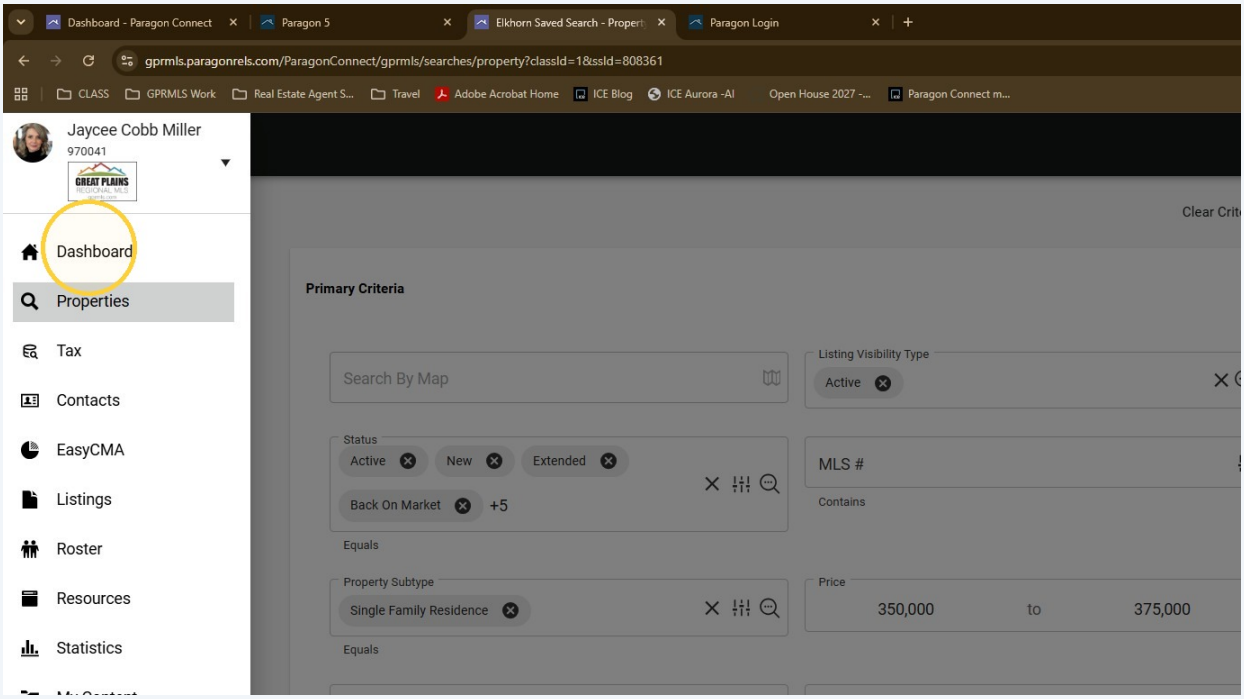
39 Click "SAVE"



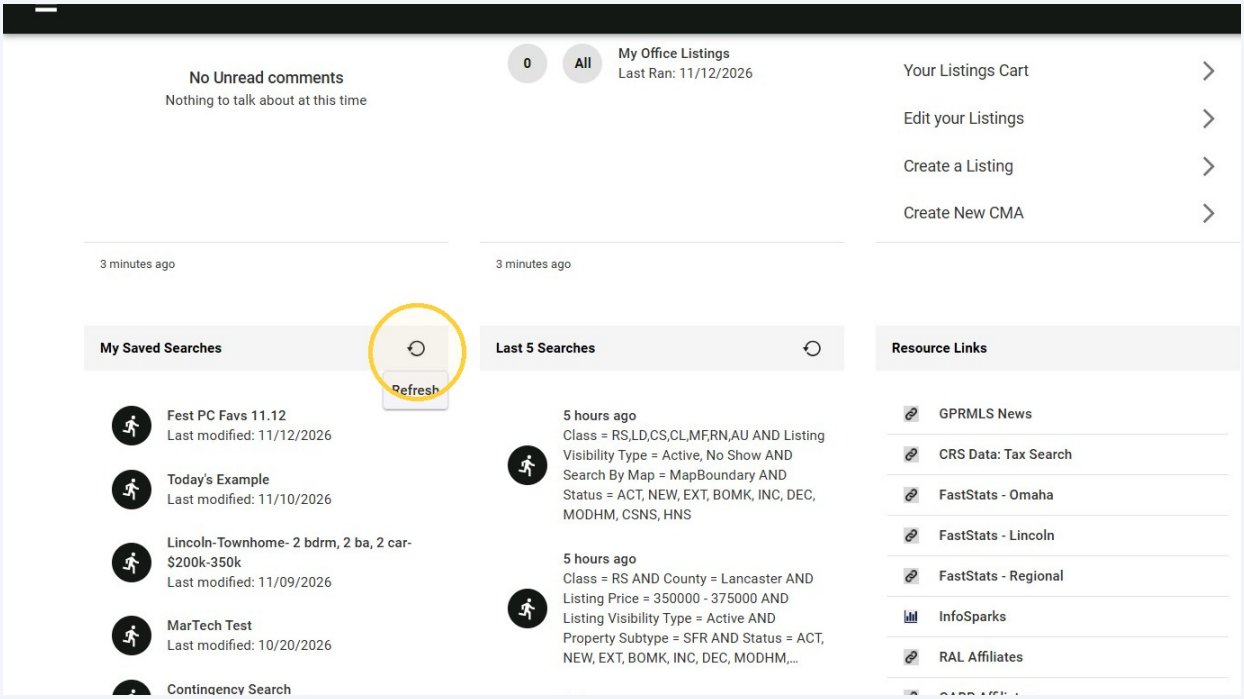
40 Let me show you where you can find your Saved Search. Open the main navigation menu using the menu icon.



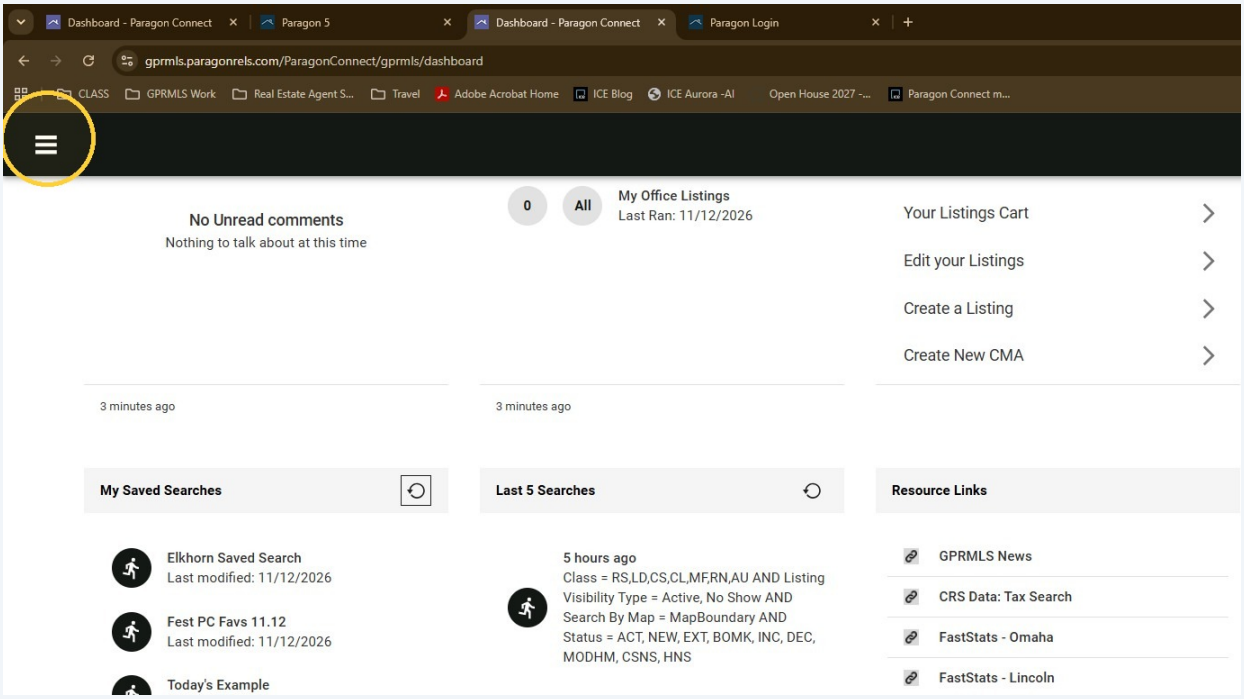
41 Click "Dashboard"



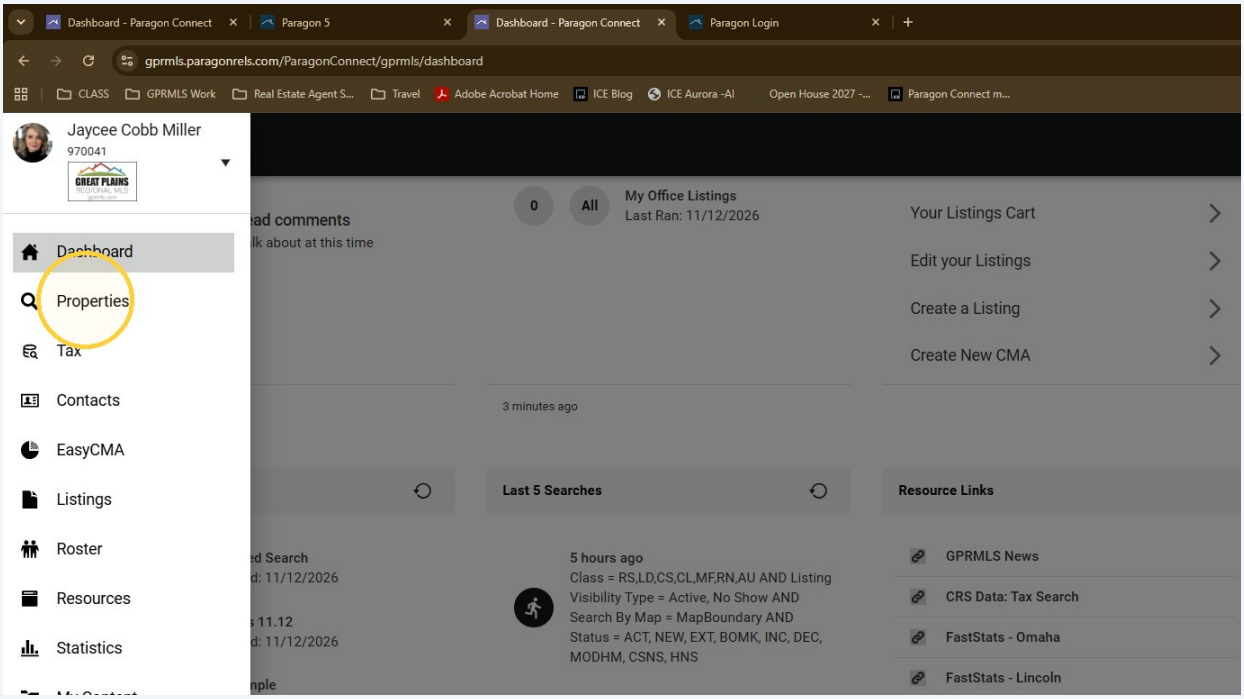
42 Refresh the My Saved Searches panel.



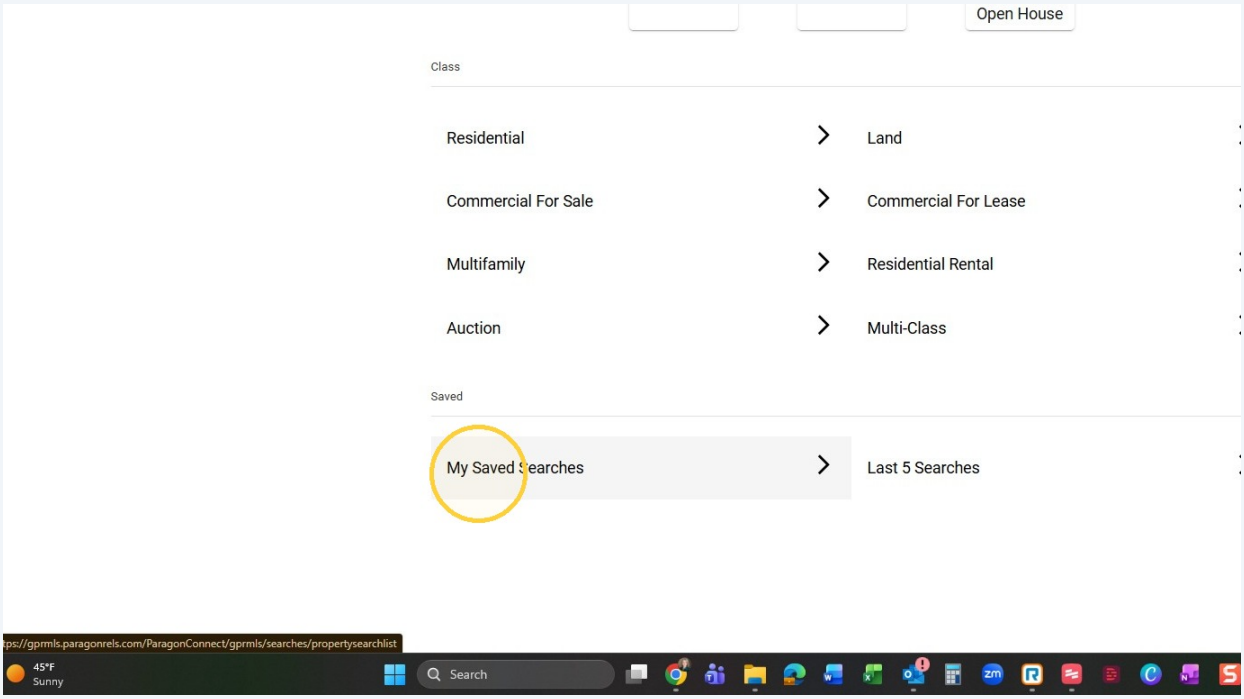
43 Open the main navigation menu using the menu icon.



44 OR - Open Properties from the navigation menu.



45 Click "My Saved Searches"



46 Run Elkhorn Saved Search. You could also Edit your Saved Search. You have set up a Saved Search!

