

# Paragon Terminology

**Auto Complete** - Is a tool to help you enter values into a field from a predetermined list of values. magnifying glass designates fields in Paragon that allow Auto Complete. (Look Up Fields)



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**Auto E-mail Notification** – Allows you to associate a saved search with a client. When Automatic E-mail Notification is activated, Paragon will automatically send the saved search results, via E-mail, to the client. There are 2 types of Automatic E-mail notifications in Paragon. You can have multiple Saved Searches for each client/prospect with Auto E-mail Notifications.

1. **E-mail Notification** – Client and Agent receive the same E-mail at the same time. In the upper left hand corner of the E-mail body is a link. The client clicks the link to see the new results. The link in each E-mail has its own 90-day limit to see the search results. There are several triggers for E-mail Notifications. They include Price Change, New Match, Open House and Tour (real estate professionals only visiting the property). A listing is only re-E-mailed when there is a price or status change (I.E. Back on Market) for that specific listing.
2. **Colab Center with Auto Notify** – Client and Agent can receive E-mail notifications at different times. When there is a match, the listings are sent to the Agent's Colab Center webpage to which the client has access. The client can see all listings that are ACTIVE every time they access Client Connect. There is **NO LIMIT** on the number of days your clients can see the listings sent to the Colab Center. The client can classify the listings as Favorite, Possible and Reject. The Client can also add confidential comments for just the Client and Agent to see. The Agent has the same functionality to act on the listings on behalf of the Client. There are several triggers for E-mail Notifications. They include Price Change, New Listing Match, New Comment, Open House and Tour (real estate professionals only visiting the property).

**Auto Search** – Saving search criteria and associating that saved search to a customer to auto-run the search.

**Class** - Is a logical grouping of Properties. TMLS has the following classes: **Residential, Multi Family, Land, Commercial Improved, Commercial Unimproved and Residential Rental.**

**Community Support** – Is an informal Paragon help site monitored by our Paragon's Customer Care/Tech Support team.

**Contact** – Is a record inside Paragon's Contact Manager. You must have at least a first name and last name in the record in order to save the record. There are fields for multiple phone numbers, E-mail address and addresses. Contact records can be imported and exported based on Outlook's file structure.

**Contact Manger** – A tool within Paragon to manage your contacts and prospects.

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**Geocode** – Means mapping your listing. It is important to “map” or “Geocode” listings. With your listing mapped, buyers’ agents can run map searches to find your Listing and create driving directions.

**LIM** – Acronym for Listing Input and Maintenance of properties

**Listing Cart** – A location where you can save MLS #s for you and your clients. Automatic E-mail notification (above) can be enabled for all listings in the Listing Cart to notify you and/or your client of a change on a listing in the Listing Cart. A listing cart listing can be sent as an Agent Recommended Listing to the Client Connect site for that customer.

**MLS Documents** – This is your MLS’ online library. You will typically find your listing input forms and other documents and forms your MLS, Board or Association feel you need.

**Paragon Help** – Is a website tool to help Paragon users learn how to use Paragon’s functionality. This site is accessed via the Help button in the upper right hand corner of all Paragon screens.

**Paragon Online Academy** – Is a Paragon learning tool. This site tracks your progress through different online modules covering different Paragon functions. Some MLS, Board or Association may require new agents to complete a Paragon Introductory set of classes.

**Prospect** – Is a contact with one or more associated saved searches. Usually, automatic E-mail notifications are setup for the Prospect. See Auto E-mail Notifications above regarding the 2 types of notifications.

**Saved Search Template** – A search template that has been customized and contains search criteria. This saved search can be associated with a contact for the purpose of auto notifications.

**Template** - A blank search screen that can be customized and saved as a template without search criteria.

**Type** - Is a logical subdivision of different kinds of properties within a property Class. Here are some common Residential Class properties Types: Single Family, Townhouse, Condominium, Attached Garage, Detached Garage, etc.

**Wizards** – Wizards are step by step software tools that take you from a starting point of a module or learning process to guide you to an end.