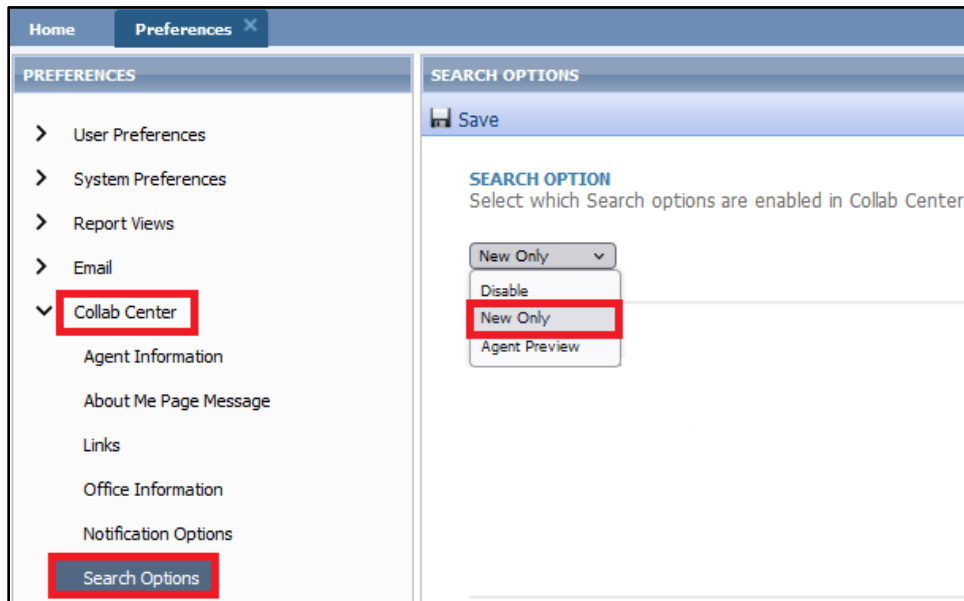


Collab Centre – Client Created Searches (Guide for REALTORS®)

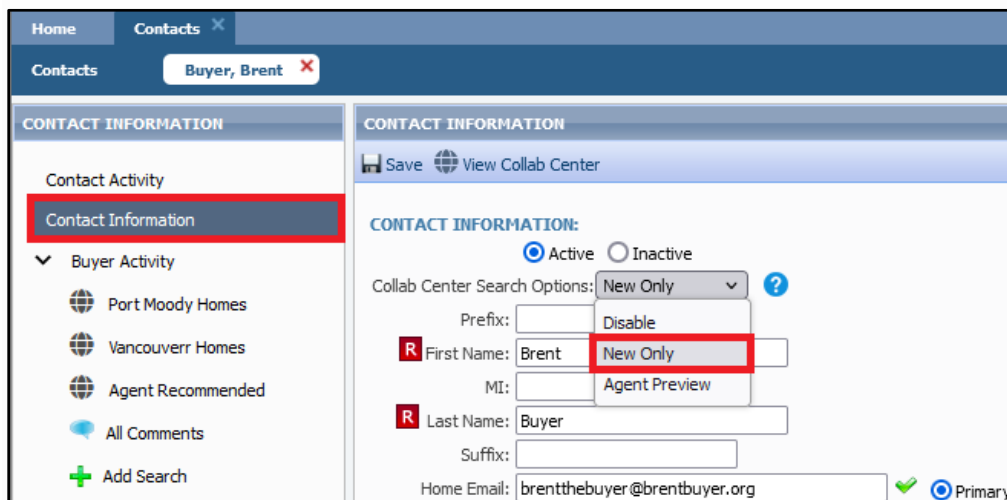
With this new feature, your buyers will now be able to create and save their own searches on Collaboration Centre, and automatically get notified of new matches. You'll have the ability to enable this for all your buyers going forward, or on an individual basis.

Enabling Collab Center - Property Search

Go to **Preferences > Collab Centre > Search Options** and select **'New Only'**. Selecting this option will enable the property search on Collaboration Centre as a default for all newly added clients going forward.



Alternatively, if you wish to enable property search for existing buyers on a client-by-client basis, open the Contact Information section on the desired contact page, and then select **'New Only'** under the Collab Centre Search Options.



Configuring Searchable Property Classes

You're also able to configure which property classes your clients can search. By default, all classes are selected. Note that only 'Active' status listings are searchable by your clients.

The screenshot shows the 'Preferences' page in the Paragon CRM. The left sidebar has a tree view with 'Collab Center' expanded and 'Search Options' selected. The main content area is titled 'SEARCH OPTIONS' and includes a 'Save' button. Under 'SEARCH OPTION', there is a dropdown menu set to 'New Only'. Under 'SEARCH CLASSES', five checkboxes are checked and highlighted with a red box: Residential Detached, Residential Attached, Multifamily, Land, and Rental. Under 'SEARCHABLE STATUS', two checkboxes are checked and highlighted with a red box: '1 - Active' and 'A - Active'.

Agent Searches vs. Buyers Searches

The search options you have available in Paragon as a Realtor® are more comprehensive, whereas the search options available to your buyers is a more scaled down version which allows for greater ease of use.

- Your buyers can only create new searches and edit their own saved searches but not the searches you created for them. They can also only search for Active Listings.
- You can edit both your saved searches and the buyers saved searches. When editing a buyer search, you'll be redirected to the Collaboration Centre property search. This allows you to edit the search with the same tools and fields available to the buyer.

There's a limit of 10 saved searches per contact combined. For example, if you have already set up 5 saved searches for your client, then either yourself or your client may combine to create up to 5 additional saved searches.

All searches will be kept together under the Buyer Activity section on the contact page, so you'll be able to track which properties/criteria they are searching.

Configuring Notification Options

You can configure whether you want to be notified when a client creates a new search or when they edit their saved search.

The screenshot shows the 'Notification Options' configuration page. The left sidebar has a tree view with 'Collab Center' expanded and 'Notification Options' selected. The main content area is titled 'NOTIFICATION OPTIONS' and includes a 'Save' button. Below the title, there is a section for 'AGENT NOTIFICATION OPTIONS' with a description: 'These fields identify what actions will trigger an email auto-notification for the agent.' The options are as follows:

- Notify on new listing
- Notify on price change
- Notify on status change
- Notify on initial photo added
- Notify on open house
- Notify on tour
- Notify on favorite listing
- Notify on possible listing
- Notify on rejected listing
- Notify on comment added
- Do not include comments in my Collab Center notifications
- Only include comments in my Collab Center notifications if there are 50 or less
- Only include comments in my Collab Center notifications if there are 100 or less
- Notify on new client search
- Notify on modified client search

Agent Notifications

Besides being notified by email that your client has created or edited their search, you'll also be able to find this information on the Contact Activity widget on the Paragon homepage, and on the Paragon Connect dashboard.

Contact Activity

The screenshot shows the 'CONTACT ACTIVITY (1 New)' widget. The 'SEARCHES' tab is highlighted with a red box. The notification content is as follows:

Jason W created a New Search
Richmond Detached Search
86 Matches

7 DAY(S)

Paragon Connect

The screenshot shows the Paragon Connect user dashboard for Isaac Appleton, a member of the Real Estate Board of Greater Vancouver. The dashboard is divided into several sections:

- Header:** User profile for Isaac Appleton with a help icon and a notification icon.
- Navigation:** Tabs for BUYERS, SELLERS, and MY INFO.
- ACTIVE BUYERS:** A section titled "ACTIVE BUYERS" with the subtitle "Recent Activity Within Last 7 Days". It features a circular profile picture for Jason W. with the initials "JW" and a red-bordered box containing the number "1". Below the profile picture, it says "Jason W" and "Site Visit: 8/30 Days".
- Legend:** A row of colored dots with labels: FAVORITE (green), POSSIBLE (blue), REJECTED (red), NEW SAVED SEARCH (purple), and COMMENT (orange).
- Summary Cards:** Three cards at the bottom showing counts: "NEW SEARCHES" (Client Created Saved Searches) with a red-bordered box containing the number "1"; "UPCOMING TASKS" (Tasks due this coming week) with the number "0"; and "SEARCH EXPIRING" (Saved searches expiring soon) with the number "0".

Email

The screenshot shows an email from Paragon Email Service to Jason. The email content is as follows:

- Header:** From: Paragon Email Service <Email@ParagonMessaging.com>. To: Jason. Date: Wed 2022-11-30 9:01 AM. Action buttons: Reply, Reply All, Forward, and a menu icon.
- Body:** A blue banner with the text "COLLABORATION CENTER" and "AGENT NOTIFICATION UPDATE EMAIL". Below the banner is a green button labeled "Go to Paragon".
- Update Summary:** A large blue number "1" in a red-bordered box is followed by the heading "TOTAL UPDATES". The text below reads: "This is the total number of updates on your Collaboration Center saved searches. This includes any new matches, price updates, status updates and more."
- Notification:** A green bar with the text "NEW SAVED SEARCH CREATED".
- Search Details:** A small icon followed by the text "Richmond Detached Search" and "Created: Wed, Nov 30, 2022".