

Activating the Customer Search Feature in CC2

Before the search function can be activated for the customer(s), the Search Options must be set in the Preferences module. To set the Search Options:

1. Click on the Menu Button **Preferences**
2. Under the Preferences menu Click **Client Connect**
3. On the left folder tree click on **Search Options**

You are now on the Search Options page.

The screenshot displays the Paragon CC2 software interface. At the top, a navigation bar contains icons for various modules: HOME, SEARCH, LISTINGS, CMA, CONTACTS, FINANCIALS, TAX, MEMBERSHIP, RESOURCES, PREFERENCES (highlighted with a red circle '1'), and ADMIN. Below this, a left sidebar shows a folder tree under 'PREFERENCES', with 'Client Connect' expanded and 'Search Options' selected (highlighted with a red circle '3'). The main content area, titled 'SEARCH OPTIONS', features a 'Save' button and three sections: 'SEARCH OPTION' (with a 'New Only' dropdown), 'SEARCH CLASSES' (with checkboxes for RESIDENTIAL, LOTS/LAND, MULTIFAMILY, COMMERCIAL, and LEASE/RENTAL), and 'SEARCHABLE STATUS' (with a tree view of statuses like 1 - Active, A - Active, N - New, 2 - Sold, S - Sold, 3 - Pending, P - Pending, and 4 - Expired). A right sidebar shows a 'PREFERENCES' menu with 'Client Connect' selected (highlighted with a red circle '2'). The bottom status bar indicates 'Session Time Remaining: 1:22:11' and 'HotSheet | Saved Property Searches'.

On the Search Options page, select:

- **New Only** to enable the search function for CC2. (this is a customer by customer setting)
- ✓ Select the property classes you would like the customers to have access to. (this is a global setting or all customers)
- ✓ Select the status(es) the customers can search (this is also a global setting for all customers)

The screenshot shows the 'Search Options' page within a 'Preferences' window. The left sidebar lists various preference categories, with 'Search Options' selected. The main content area is titled 'SEARCH OPTIONS' and includes a 'Save' button. It contains three sections: 'SEARCH OPTION' with a dropdown menu set to 'New Only', 'SEARCHABLE STATUS' with a list of statuses, and a 'Classes' section with checkboxes for property types. Three callout boxes provide instructions: a blue box for the 'New Only' selection, a green box for the property classes, and a purple box for the search statuses.

Home | **Preferences** x

PREFERENCES

- User Preferences
- System Preferences
- Report Views
- Email
- Client Connect
 - Agent Information
 - About Me Page Message
 - Links
 - Office Information
 - Notification Options
 - Search Options**
- Tax Reports
- CMA
- Third Party Preferences

SEARCH OPTIONS

Save

SEARCH OPTION
Select which Search options are enabled in Client Connect

New Only
Disable
New Only
Agent Preview

Select New Only to allow your customers to search on the CC2 site

Select the Classes that can be used by the contact to create a new Search in Client Connect.

RESIDENTIAL
☐ LOTS/LAND
☐ MULTIFAMILY
☐ COMMERCIAL
☐ LEASE/RENTAL

Select the classes you want to be available to them to search

SEARCHABLE STATUS
Client Connect 2.0 only allows your clients to search on active statuses. Below, you can further refine

1 - Active

- A - Active
- N - New

2 - Sold

- S - Sold

3 - Pending

- P - Pending

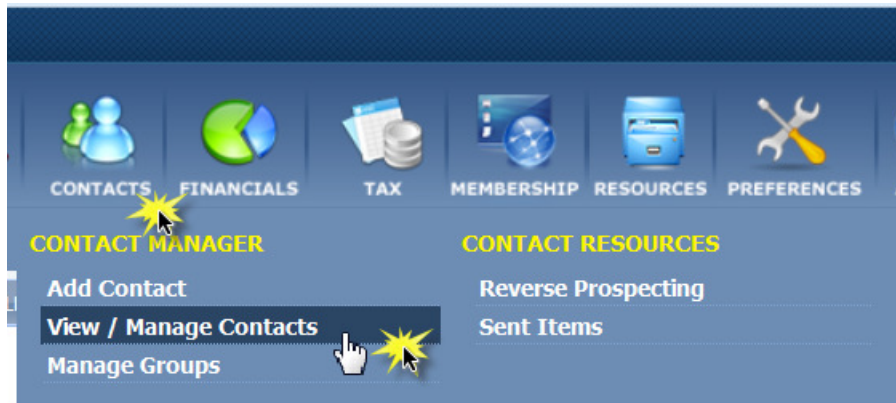
4 - Expired

Select the status(es) they can search

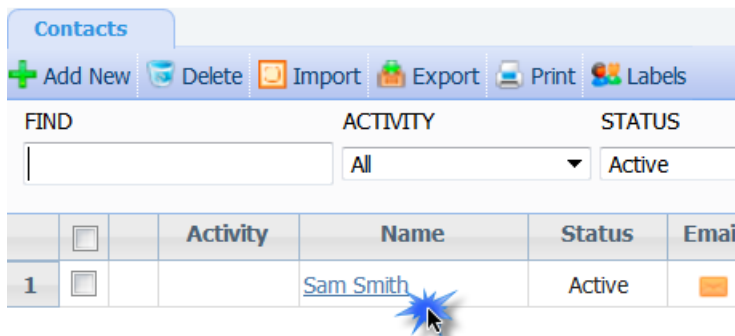
Session Time Remaining: 1:30:25 | Hotsheet | Sav

Now that the Search Options are set, you are ready to add a new contact or select an existing contact from your list of contacts to be sure search is enabled for each contact and check they have a valid email address marked primary.

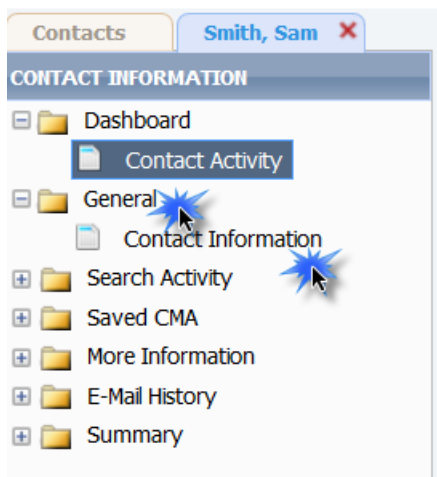
Click on the **Contacts** menu button, **View/Manage Contacts**.



Click on the name of the contact you want to enable to search.



Expand the **General** folder in the file tree. Click on **Contact Information**



This opens the **Contact Information** page.

Choose **New Only** and be sure there is a valid email address marked **Primary**.

The screenshot shows the 'New Contact' form in a web application. The 'CONTACT INFORMATION' section is active. The 'Client Connect Search Options' dropdown menu is open, showing 'New Only' as the selected option. A yellow box with blue text and green arrows points to the 'New Only' option and the 'Home Email' field, which contains 'ssmith@someemail.com'. The 'Home Email' field is marked as 'Primary' with a green checkmark. Other email fields are marked as 'Primary' with radio buttons. The form includes fields for Prefix, First Name (Sam), MI, Last Name (Smith), Suffix, Company, Job Title, Spouse/Secondary Name, and Spouse/Secondary Email. A checkbox for 'Add the Spouse/Secondary to notifications?' is at the bottom.

CONTACT INFORMATION:

☒ Active ☐ Inactive

Client Connect Search Options: **New Only** (selected)

Prefix:

R First Name:

MI:

R Last Name:

Suffix:

Home Email: **Primary** (checked)

Work Email:

Other Email:

Company:

Job Title:

Spouse/Secondary Name:

Spouse/Secondary Email:

☐ Primary

Add the Spouse/Secondary to notifications? ☐

On the CC2 dashboard the customer will click on the Menu drop down to access the search function.

The screenshot shows the CC2 dashboard. The left sidebar has a menu with 'Dashboard', 'Property Search', 'My Searches', 'Saved Folders', and 'Communication'. The main content area displays 'Saved Listings' with counts for Undecided (4), Favorites (3), Possible (2), Rejected (0), and Agent Picks (0). Below this is an 'Updates' section with counts for Total Updates (9), New Matches (4), Price Changes (0), and Status Change (5). A 'Notices' section shows counts for New Comment (0), Open House (0), and Recent Sales (102). The main listing is for '4810 W. Roberts Rd.' in Boise, ID, priced at \$964,900. It is marked as 'Active - Active'. The listing includes a photo of a house and a description: 'FABULOUS view overlooking Hillcrest Country Club. Quiet gated community steps to clubhouse. Built in 2005 w/ open, airy floorplan, soaring ceilings & loads of upgrades. Gourmet kit w/ granite, abundance of beautiful cabinets, 5/5 appliances, island & huge pantry. Great room featuring hiu, ...'. It also shows 'BEDS: 4', 'BATHS: 4.5', 'SQ FT: 5395', and '14 Days on Market'. A 'View Detail' button is at the bottom right.