

# 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.

POWER SEARCH

Paragon™

HOME SEARCH LISTINGS CMA CONTACTS FINANCIALS TAX MEMBERSHIP RESOURCES PREFERENCES ADMIN

1

2

3

Session Time Remaining: 1:22:11

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)

Home Preferences

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

RESIDENTIAL  
LOTS/LAND  
MULTIFAMILY  
COMMERCIAL  
LEASE/RENTAL

SEARCHABLE STATUS

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

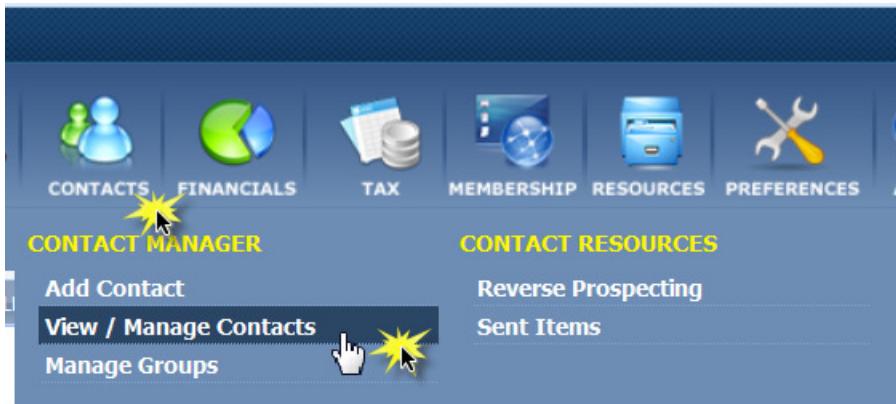
1 - Active  
A - Active  
N - New  
2 - Sold  
S - Sold  
3 - Pending  
P - Pending  
4 - Expired

Session Time Remaining: 1:30:25

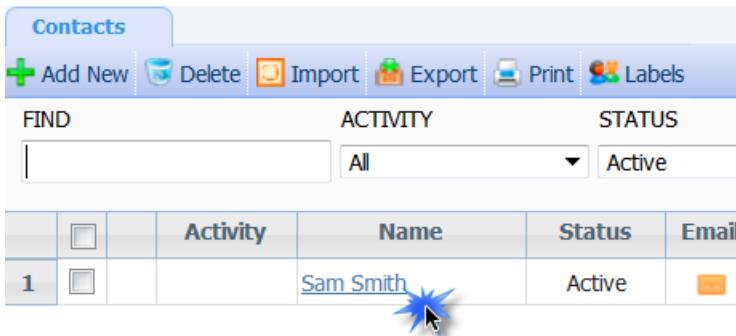
HotSheet | Save

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.

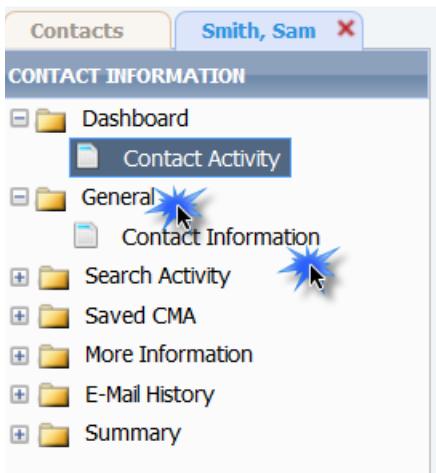
Click on the **Contacts** menu button, **View/Manage Contacts**.



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**.

Home Preferences Contacts X

Contacts New Contact X

CONTACT INFORMATION

Save

**CONTACT INFORMATION:**

Active  Inactive

Client Connect Search Options:  ?

Prefix:

First Name: Sam

MI:

Last Name: Smith

Suffix:

Home Email:

Work Email:

Other Email:

Company:

Job Title:

Spouse/Secondary Name:

Spouse/Secondary Email:

Primary  Primary  Primary

Add the Spouse/Secondary to notifications?

Select New Only so they can search. Be sure you have their valid email address and it is marked Primary

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

BKMLS 1

Dashboard

Property Search

My Searches

Saved Folders

Communication

Saved Listings

4 Undecided	3 Favorites	2 Possible	0 Rejected	0 Agent Picks
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Updates

9 Total Updates	4 New Matches	0 Price Changes	5 Status Change
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Notices

0 New Comment	0 Open House	102 Recent Sales
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ALL SAVED SEARCHES

SORT BY: PRICE-HIGH TO LOW

New Match  4810 W. Roberts Rd. Boise, ID Residential Active - Active \$964,900

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, S/S appliances, island & huge pantry. Great room featuring fireplace, ...