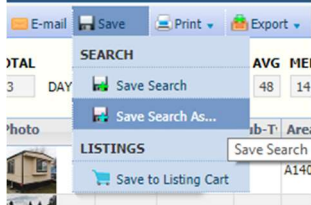


Set up Collab Center for Buyers

Section 1 - Neither the contact or the saved search has been created yet

1. Go to **Search > Residential** (or whatever property type they need)
2. Enter your criteria
3. Click **Search**. Review results to ensure they are what is needed.
4. Click on **Save > Save Search As...**



5. Click on the Contact tab of the window that opens.

A screenshot of the 'Save Search As...' dialog box. The 'CONTACT' tab is selected, indicated by a red arrow. The dialog has two main sections: '1. NAME YOUR SEARCH' with a text input field containing 'Residential', and '2. ASSIGN TO A CONTACT' with a dropdown menu. Below the dropdown is a link that says 'Need to add a new contact? Click the button below.' and a green 'ADD CONTACT' button with a red arrow pointing to it. At the top right of the dialog are 'Save & Notify', 'Save', and 'Cancel' buttons.

6. Name the search. It is personal preference.
7. Click on the green **Add Contact** button
8. When the window opens, enter name and email address – the rest can be left blank if desired. The full name does not need to be entered – it can be a single letter, a nick name or whatever BUT remember the client will see it at some point.
9. Click **Save**
10. Click **Save & Notify**

A screenshot of the 'Save Search As...' dialog box. The 'CONTACT' tab is selected. The '1. NAME YOUR SEARCH' field contains 'Residential Peyton'. The '2. ASSIGN TO A CONTACT' dropdown menu shows 'Manning, Peyton'. Below the dropdown is a link that says 'Need to add a new contact? Click the button below.' and a green 'ADD CONTACT' button. At the top right of the dialog, the 'Save & Notify' button is circled in red. Other buttons are 'Save' and 'Cancel'.A screenshot of the 'Add Contact' dialog box. It has a 'Prefix' field, a 'First Name' field with 'Peyton', a 'MI' field, a 'Last Name' field with 'Manning', and a 'Suffix' field. Below these is an 'EMAIL:' section with a dropdown set to 'Home' and an email address 'sldknffij@gmail.com'. There is also a 'TELEPHONE:' section with a dropdown set to 'Home', a country code dropdown set to '+1', and a phone number '201-555-5555'. At the bottom is an 'ADDRESS INFORMATION:' section with a checkbox for 'Contact Requests Privacy (will not appear on Mailing Labels)'. At the top right of the dialog are 'Save' and 'Cancel' buttons.

11. The Saved Searches section of the contact should open.

SAVED SEARCHES

Remove Search Edit Search

SAVED SEARCH ACTIVITY:

Name	Total	New Matches	Changed	Date Created
Residential Peyton				5/16/2019

NOTIFICATION OPTIONS

- OFF
All Notifications will be set to Off. No numbers will accumulate in the Total, Matches, New or Changed columns.
- NO NOTIFICATION
View matches for saved searches without sending any email notifications to you or your client.
- E-MAIL NOTIFICATION
Select E-Mail Notification to receive e-mail notifications of listings in this search that are new or have a price change.
- COLLAB CENTER WITH AUTO-NOTIFY
Select Collab Center with Auto Notify to enable a Collab Center site for this contact where they will be able to interact with listings in this search.

12. Click on **COLLAB CENTER WITH AUTO-NOTIFY**

13. The default is to send them notifications Immediately. If you want to change that, click on the **Notification Settings** link in the **SITE CONFIGURATION** section

14. Once that is done, click on the **SEND LINK** button in the **SETUP COMPLETE** section

Select E-Mail Notification to receive e-mail notifications of listings in this search that are new or have a price change.

- COLLAB CENTER WITH AUTO-NOTIFY
Select Collab Center with Auto Notify to enable a Collab Center site for this contact where they will be able to interact with listings in this search.

LAST ACCESSED BY CLIENT

Client has not accessed the site

COLLAB CENTER

List Name	Undecided	Favorites	Possible	Rejected
Residential Peyton	53	0	0	0

SITE CONFIGURATION

Send Notification To Client: On Off

[Notification Settings](#)

[Collab Center Preferences](#)

SETUP COMPLETE

Once your setup is complete, click the Send Link button below to send the Collab Center link to your contact.

SEND LINK

15. An email window opens. The **Subject** line can be changed if desired. Nothing needs to be typed in this window – there is a pre-made system email that goes out – but another message may be added. Click **Preview** to see the message before sending. Click **Send** to send the link to the Collab Center to the contact.

Send Link To Client Preview Send Cancel

Address Book Attachment BCC Me

To:

Cc:

Bcc:

Subject:

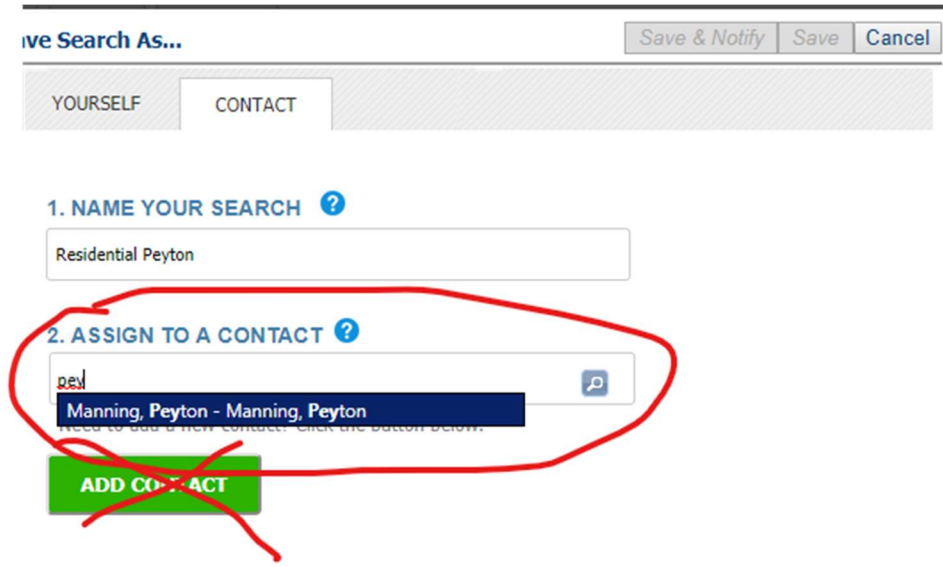
Attachments:

*Type your custom message below. Click Preview to see the message before sending.

16. It is **DONE**. Contacts can be closed.

Section 2 - The contact has already been added to the system but does not have a Saved Search.

1. Repeat steps 1 through 6 above.
2. In the box that says **ASSIGN TO CONTACT**, type the client's name and pick from the list or click the Magnifying Glass to get the list of contacts in the system. DO NOT click Add Contact.



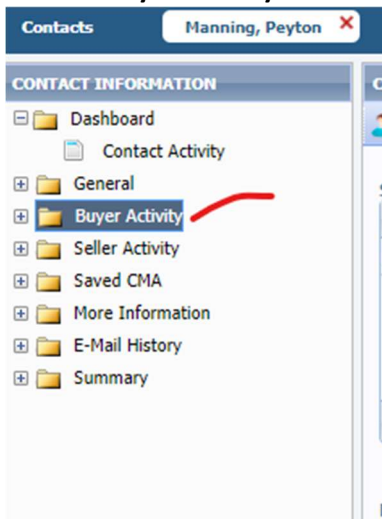
3. Once their name shows in the box, continue with **Steps 10-15** in Section 1.

Section 3 - The contact is already in Paragon AND there is a Saved Search but they are not connected to each other

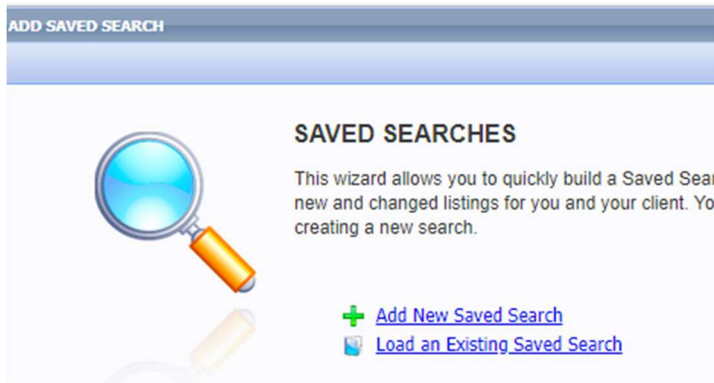
1. Go to **Contacts > View/Manage Contacts**
2. Click on the contact's name

3	+	Angel M	Active		0	0	0										05/13/2019		
4	+	Peyton Manning	Active		52	VIEW	52	0	52	0	0	0					05/16/2019		

3. Click on **Buyer Activity** in the left side panel



- Click on **Add Search** on the left side. On the right there are two options a) **Add a New Saved Search**, which created a new Saved Search like in Section 2 OR b) **Load an Existing Saved Search**, that displays all the saved searches in the system that were previously created



- If the search was previously saved, click on **Load an Existing Saved Search**.
- Select the search or searches to be added and click **Save**



- Now pick up from **Step 11** in the first section and that's it!