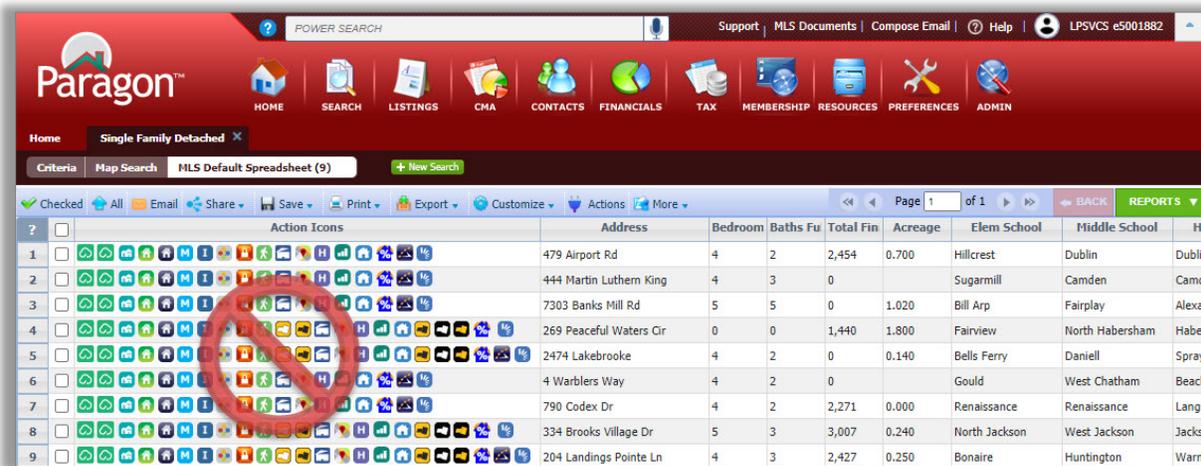# Agent Level Changes

The following section contains changes that are active system wide and available to users based on their assigned security levels.

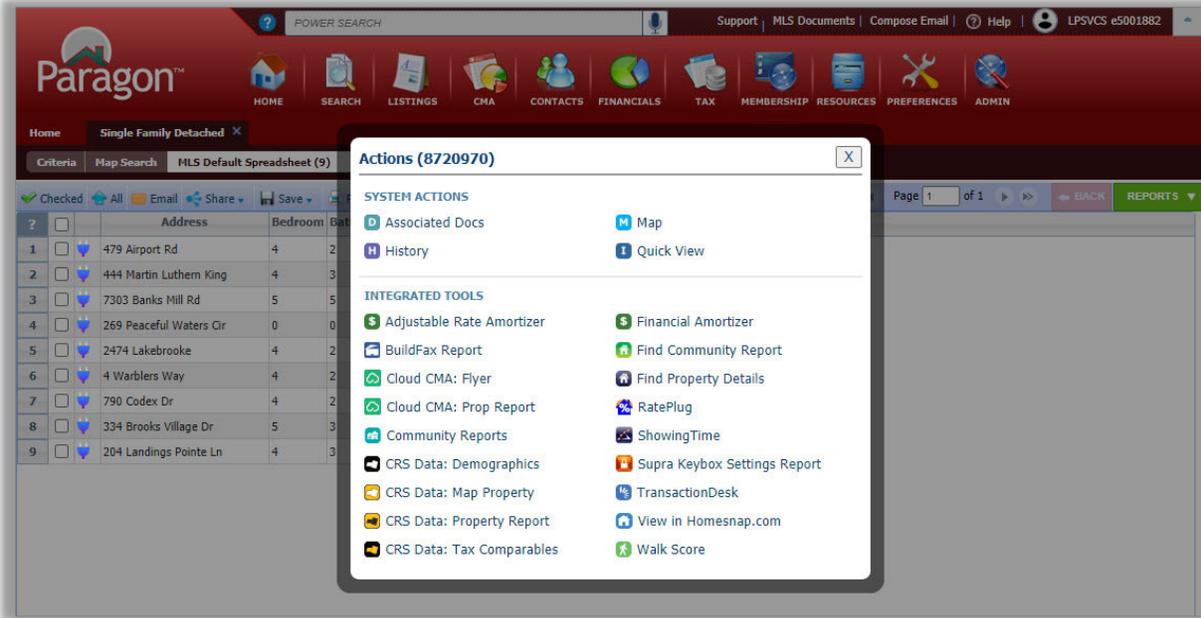## Enhanced Access to Integrations and Paragon Tools

Action Item: N/A

Does your Action Icons column look like the following? Wouldn't it be nice if you could view more data and fewer icons but still have access to the integrations and tools? Well, you're in luck.
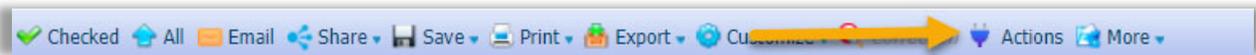

In 5.81, we enhanced the way users access Integrations and other Paragon System Actions from the spreadsheet search report as well as the detail views. The Action Icons column of the spreadsheet has been modified to display a single icon 🔌 to provide access and more viewing space for data.

Paragon 5.81 Release Enhancements

In addition to the column in the spreadsheet, a new Actions button has been added to the menu bar.
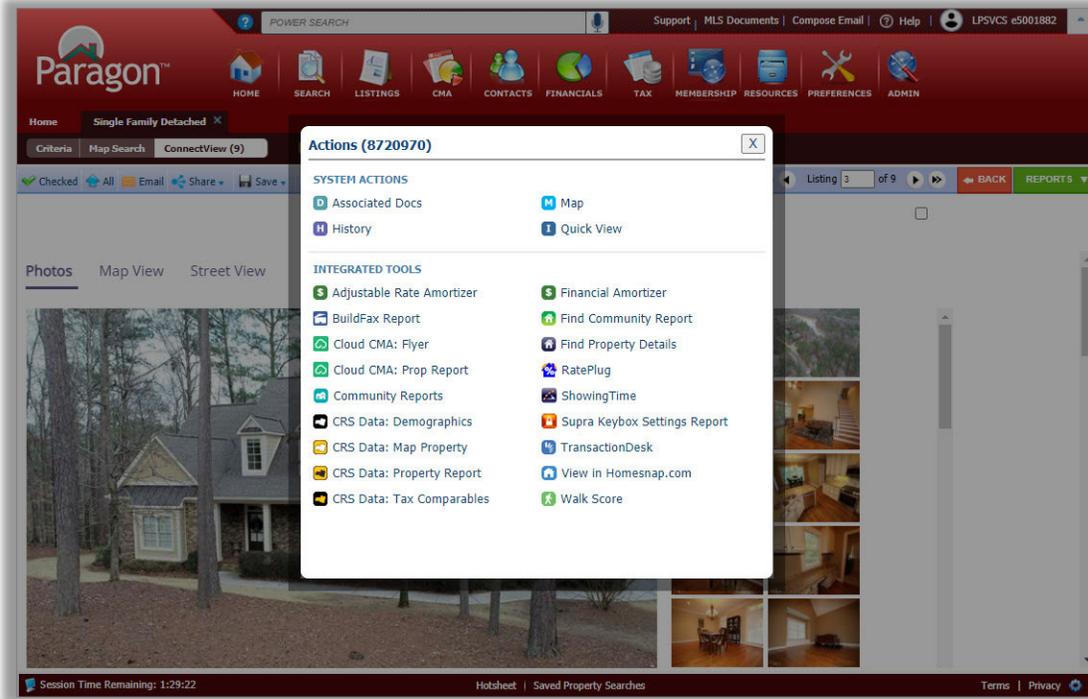

This does a couple of things. One, from the spreadsheet report view it provides access to actions that users can take when multiple records are selected. The Actions dialog box includes logic to display the available options based on whether <u>one</u> or <u>some</u> records are selected.

Two, it makes Integrations and Paragon Tools available from ConnectView (and any other detail view). Clicking on the button will display all the available options for the record in view.

Paragon 5.81 Release Enhancements

This effectively removes the need to have the icons embedded into custom reports. Before this release, if the icon was not present in the current report being viewed, users would have to return to the spreadsheet search report or pull up the All Fields Detail or another report containing icons in order to access the action.

Other Menu Changes

In addition to adding the new Actions button, the previous Actions menu was succinctly renamed "More" since it includes the overflow of menu options that do not fit in the toolbar.
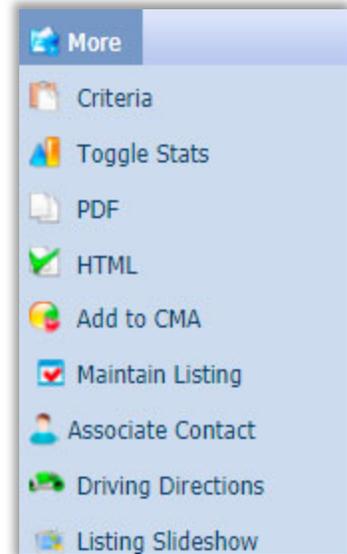
Before 5.81

After 5.81

Paragon 5.81 Release Enhancements

Checked ⬆ All ✉ Email ⚡ Share ▾ 💾 Save ▾ 🖨 Print ▾ 📤 Export ▾ ⚙ Customize ▾ 🔍 *Correction* ▼ Actions 📇 More ▾

You will also notice in the overflow menu to the right that the multi-select integrations such as Cloud CMA, ShowingTime and View in CRS are no longer present (if your MLS subscribed, that is). They now reside under the new Actions menu as previously shown when more than one record is selected in the spreadsheet.

More
- Criteria
- Toggle Stats
- PDF
- HTML
- Add to CMA
- Maintain Listing
- Associate Contact
- Driving Directions
- Listing Slideshow

In summary, following are the benefits of this great new feature:

- Access to integrations from ConnectView or any other detail view
- All integrations accessible from central location
- More space for listing data on spreadsheet due to narrower column in spreadsheets
- Actions button in toolbar is context sensitive
  (i.e. displays single-option integrations when only one listing is selected or multi-option integrations when multiple are selected)
- Access to integrations from any detail view even if Action icons are not in report
- No need to hover over an icon to "discover" what it is – the label is displayed with the icon
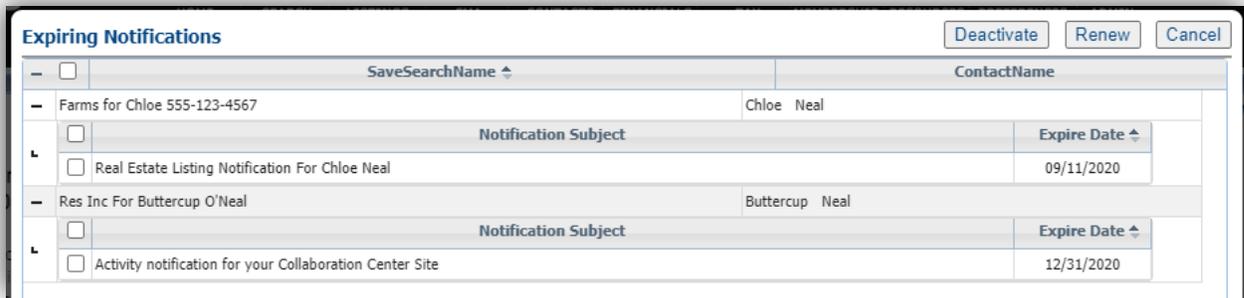- Action icons no longer needed in custom reports

Prospecting – Updates to Expiring Notifications

Action Item: N/A

To Simplify and improve user experience, the expiring notifications dialog window has been enhanced to include the Contact Name, the Last Accessed and Last Notified Dates. Also included is the ability to enable/disable or extend the notifications for another year with a single click!

Additionally, when a search is extended, Paragon will run the search against current prospecting restrictions and return the usual error message if any criteria in the search is now prohibited.

Old View:

New View:

Prospecting –Reminder to Approve Listings for Agent Preview
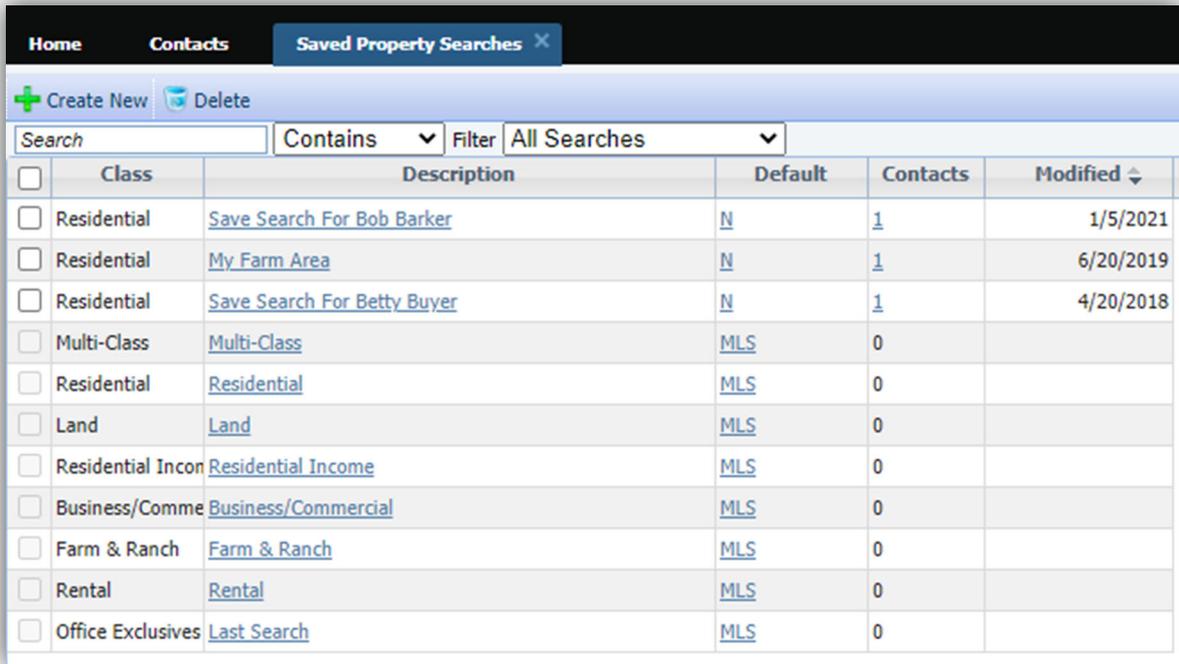
Action Item: N/A

When using Agent Preview and Collaboration Center, listings do not appear in Collaboration Center until they are approved by the agent. To remind agents that they must approve their listings, so they appear in Collaboration Center, a new warning message displays when the Collaboration Center Welcome Email is sent initially or resent via Resend Invitation. The warning remains on screen until the user closes it.

Search – Add Date Modified to Saved Property Searches

Action Item: N/A

To assist users with managing saved searches, a Modified date column has been added to the grid in Search > Saved Property Searches. The grid can be sorted by the Modified date by clicking on the column header.
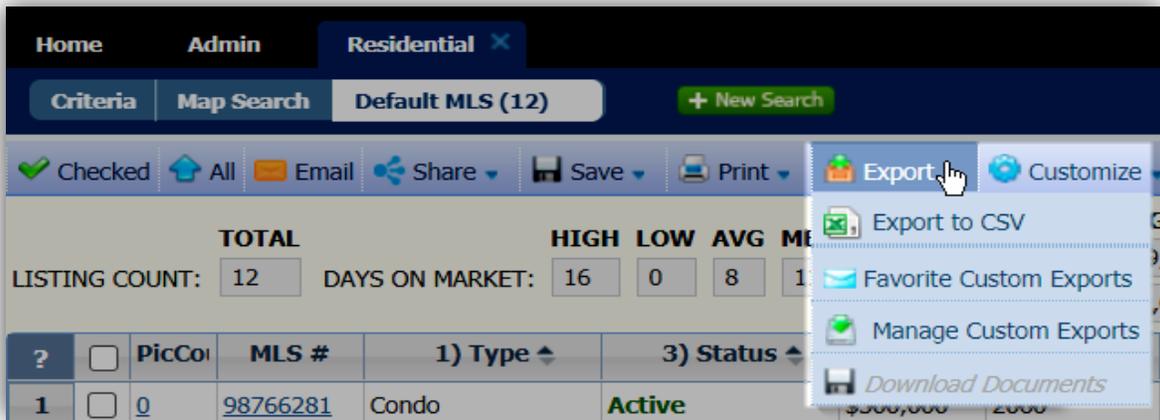
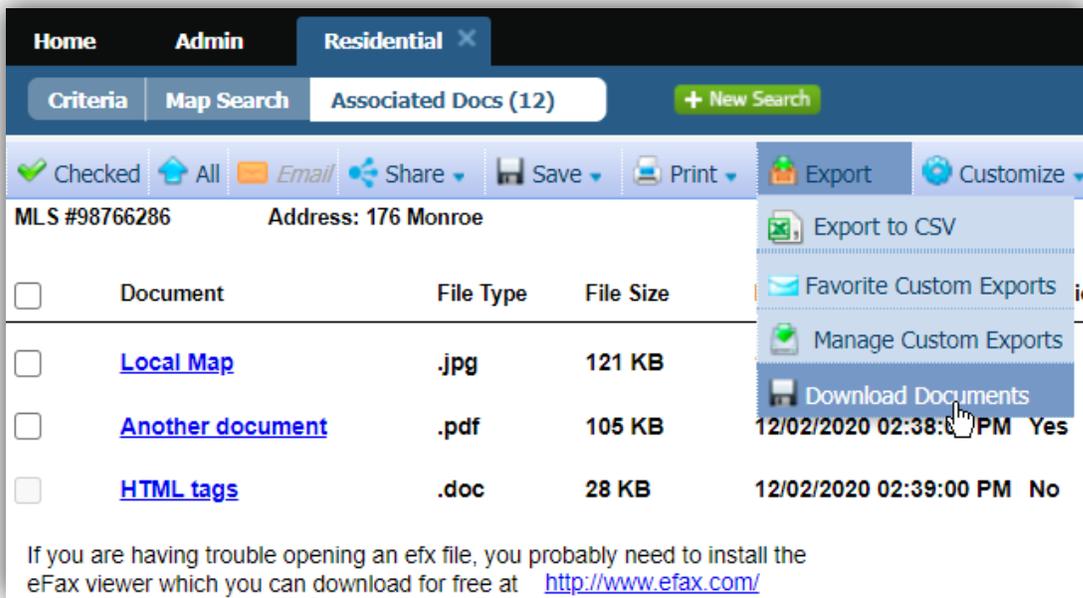# Search – Clarify access to Download Documents functionality

Action Item: N/A

The option to allow bulk download of Associated Documents was displaying even when no valid documents were available. To avoid confusion, the Download Documents option will be hidden when public documents are not enabled on the site. When public documents are enabled, the Download Documents option is available but disabled unless the user is on the Associated Documents report.

Public Documents enabled = Download Documents enabled:

Download Documents enabled from the Associated Docs report:

Power Search – Remove voice icon from incompatible browsers

Action Item: N/A

The voice option on Power Search is currently only valid for the Chrome browser. To avoid confusion, the voice search icon has been removed from all other browsers.

CMA – Standardize references to the CMA Preference Wizard

Action Item: N/A

References to the CMA Preferences Wizard have been standardized across the CMA module, to clarify for the user that all instances are referencing the same Wizard.

Property Watch –Suspend Notifications Based on Security Level
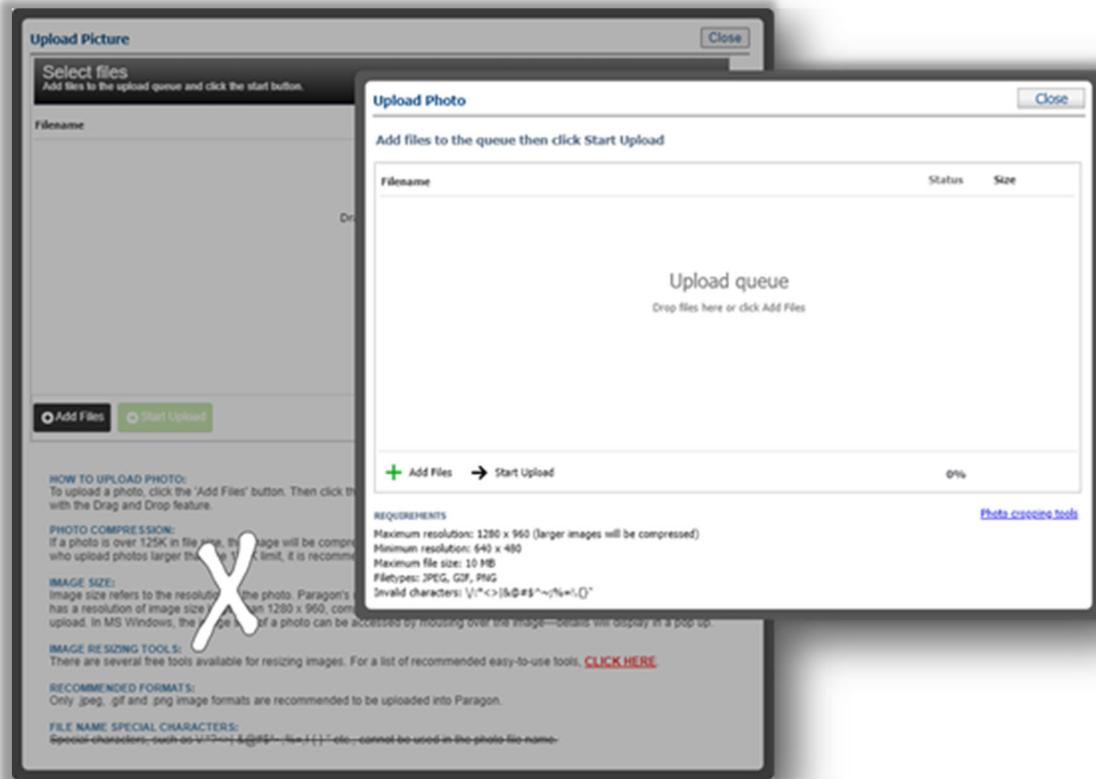
Action Item: N/A

This enhancement fixes an issue where Property Watch notifications were being sent out even if the user fell below the specified security level for Property Watch. If a user falls below the MLS-specified security level, no email notifications will be sent to the agent for new alerts, but the alerts will be retained in Paragon. If the user's security level changes in future to a valid setting for Property Watch notifications, notifications will resume.

Paragon 5.81 Release Enhancements

Photos –Easier to Read Instructions for Uploading Your Photos
Action Item: N/A

When uploading your images in Listing Input, Agent Photos, Office Logos, etc., we have simplified the instructions while retaining all functionality.
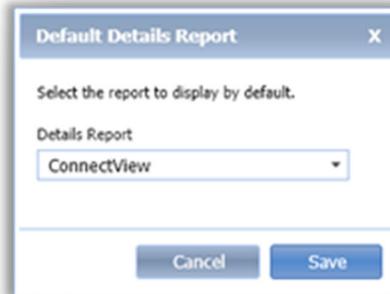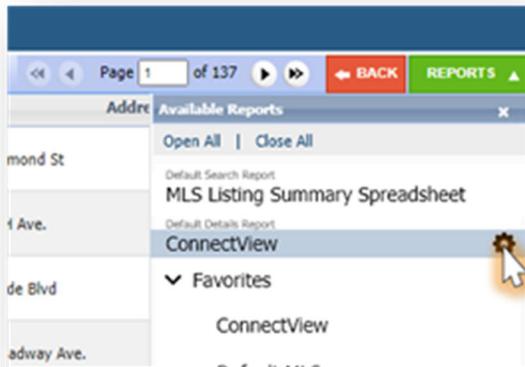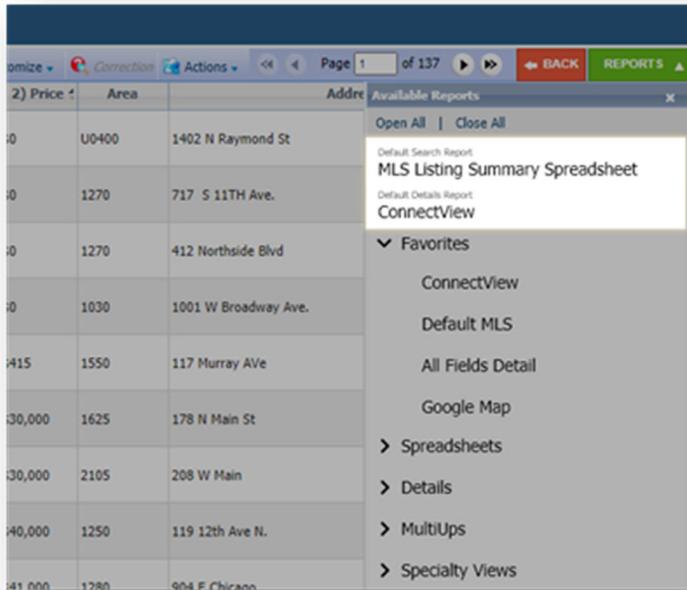
Reports –Listing Report Menu Enhancements

Action Item: N/A

The Listing Reports Menu now indicates the user's preferred default reports for Search Reports and Detail Reports.

The user can change their preference from this screen.

Note: Selected preferences will be reflected in User Preferences | System Preferences | Results Options
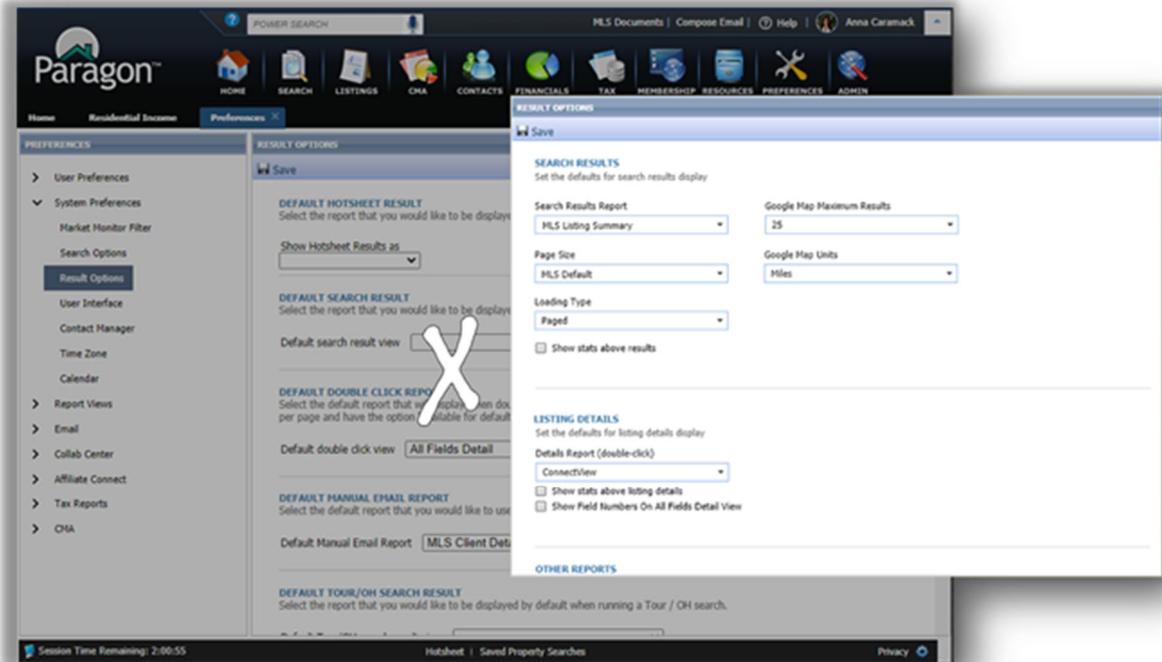
Preferences –Results Preference UI Update

Action Item: N/A

Result Options page in User Preferences and in the Preference Wizard, has been reorganized so that related options are grouped together, and unnecessary text has been removed to create a more user-friendly layout.
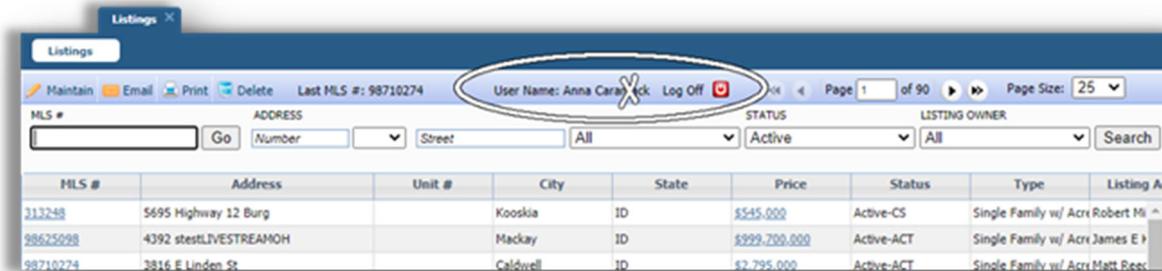
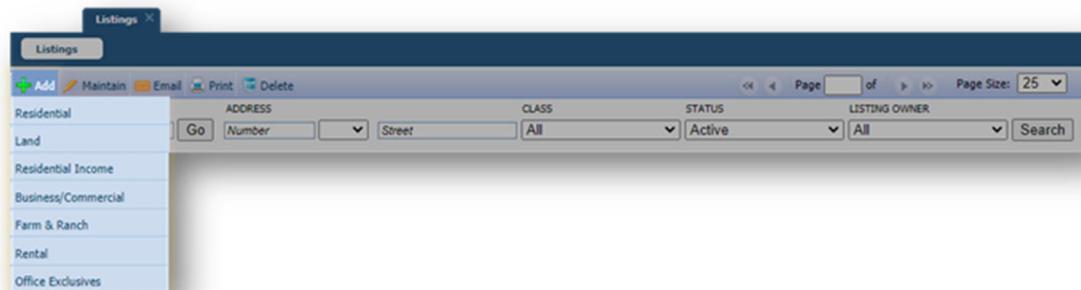# Partial Listing – Removal of the Logoff Toolbar Button

Action Item: N/A

The Log Off button has been removed from the Listings Maintenance toolbar. This addresses a defect that was introduced in 5.80 with the login screen update. Users can easily assume identity from the user menu.
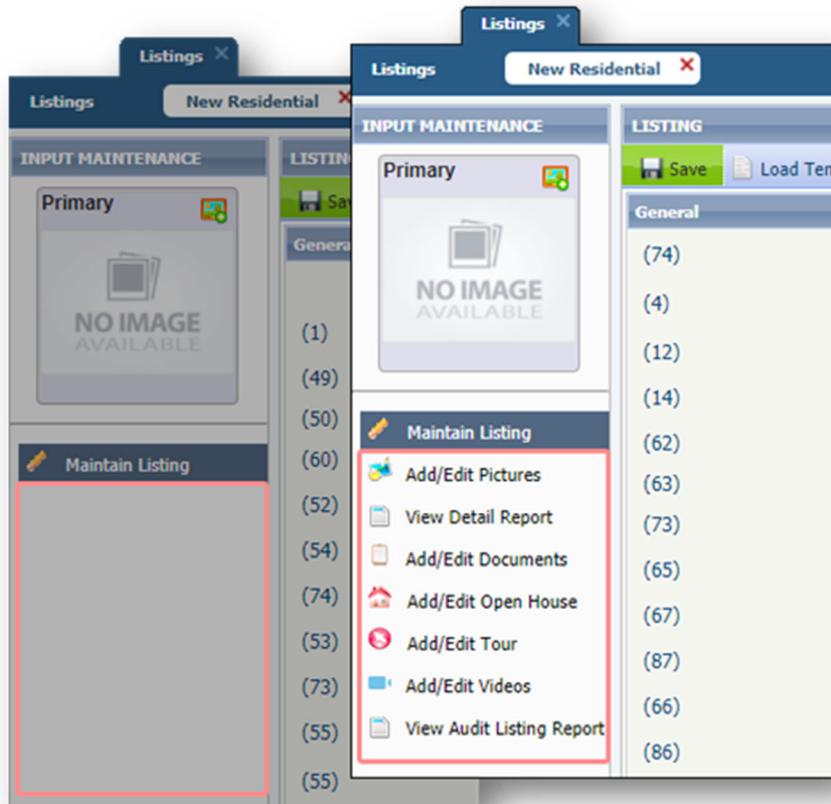

Listings – New "Add" button in Listing Toolbar

Action Item: N/A

When maintaining a listing we have added a new "Add" button so that you can easily have access to add a new listing of any class. (this is for both Partial and Full) This will simplify the steps needed when adding and modify listings.

Listings – New Listing Navigation Simplification

When maintaining a listing in the past you had to save your listing in order to see the additional options available such as adding or maintain photos, adding an open house etc. Now for both Partial and Full when adding a listing you will have all of the additional navigation options available to you without having to save first.
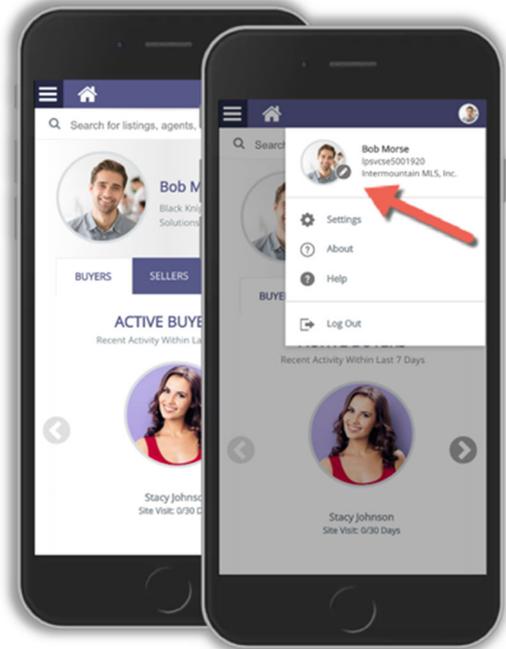
Paragon Connect

All options in this section are either configurable via MLS Administration controls or by your System Support Manager as noted.

Settings – Snap or Upload Agent Image

Action Item: N/A

Does your agent photo need updating? Now you can snap a picture or upload a new agent profile image. Your image is synced with Paragon Classic so there is no need to reload or add twice. It also uses a crop tool to make sure your photo fits the circle profile layout perfectly.
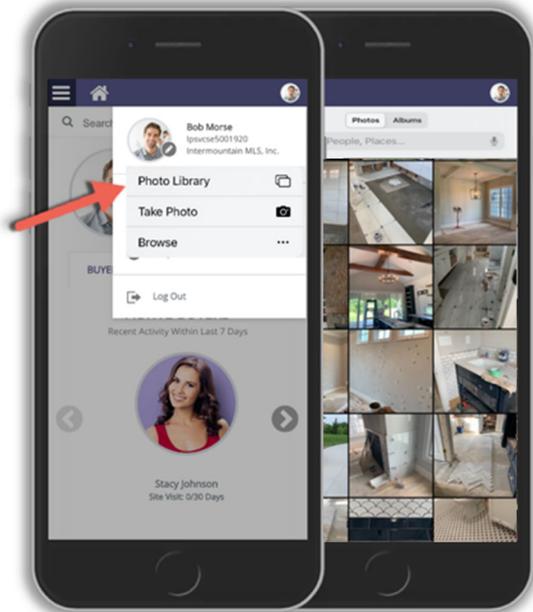
You will notice a pencil icon on the profile photo. This just lets you know that you can change this photo.

HOW IT WORKS!

After you tap on the pencil icon, you will be presented with three options:

- **Photo Library:** This will allow you to choose a photo from your phone's photo library.
- **Take Photo:** Use your camera on your phone to snap a selfie of yourself.
- **Browse:** If you have storage options or storage apps on your phone you can locate your profile image with these applications.
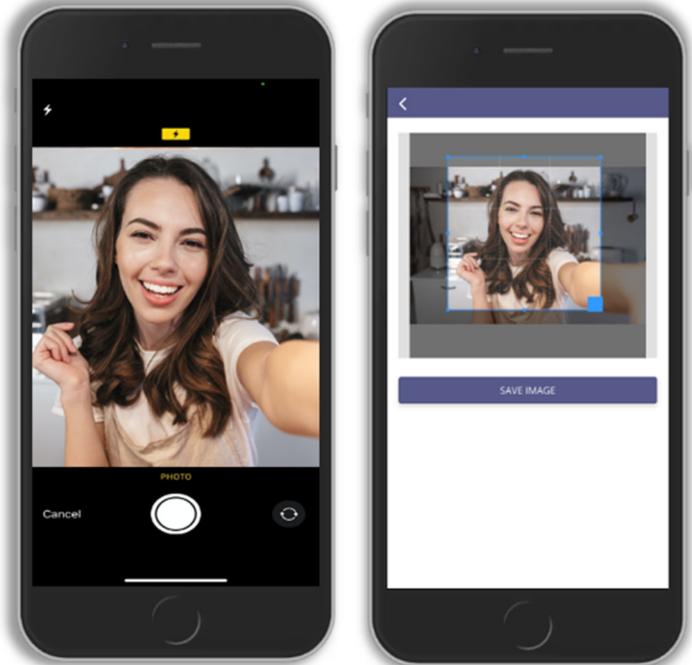
Paragon 5.81 Release Enhancements
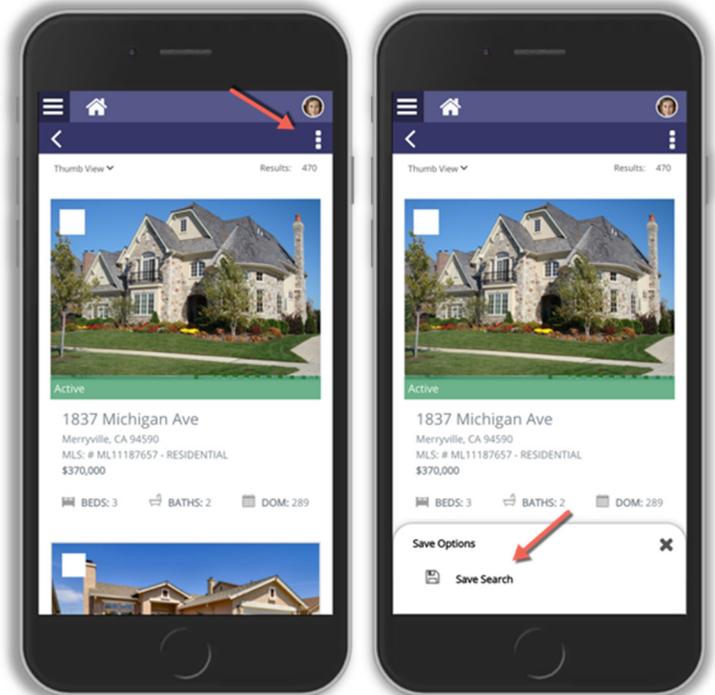
UPLOAD AND CROP

If you do plan to snap your own photo, just note the application will come built in with a crop tool to make sure your image fits perfectly with in the circle frame.

Just snap your photo and you will be taken to a crop screen. From here you can move the crop area and you can also increase or decrease the crop square. When done just click save and your profile image will be replaced. Again, this also updates your profile image within Paragon Classic.

Save from Results

Now from the search result screen, agents can save a search and setup a Collaboration Center site. Prior to this enhancement, agents were required to go back to the search screen and then save the search. This new workflow will provide agents with an alternate workflow to quickly save a search.
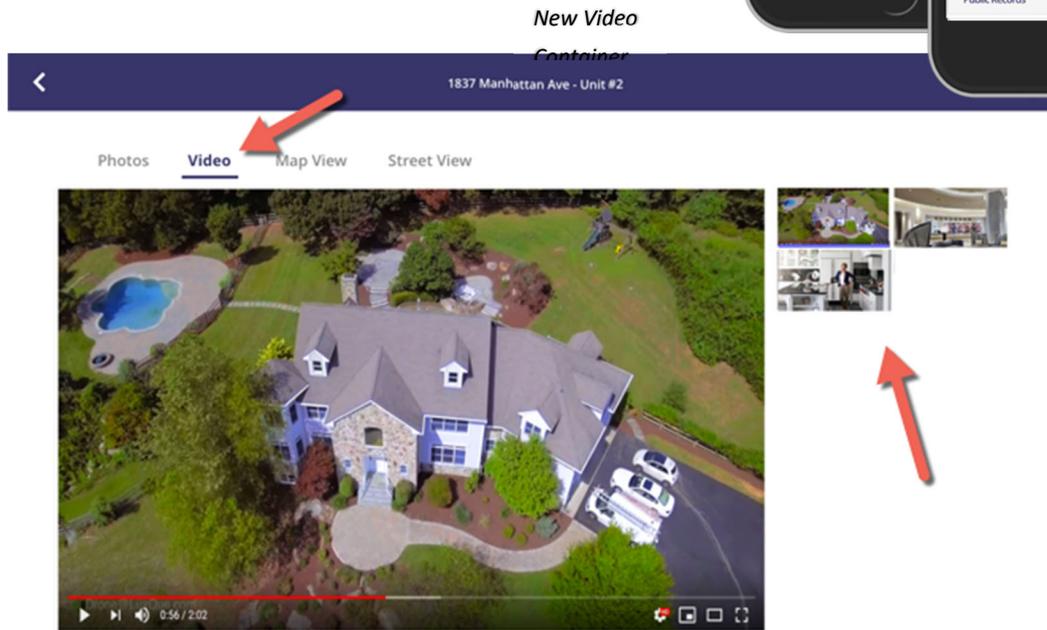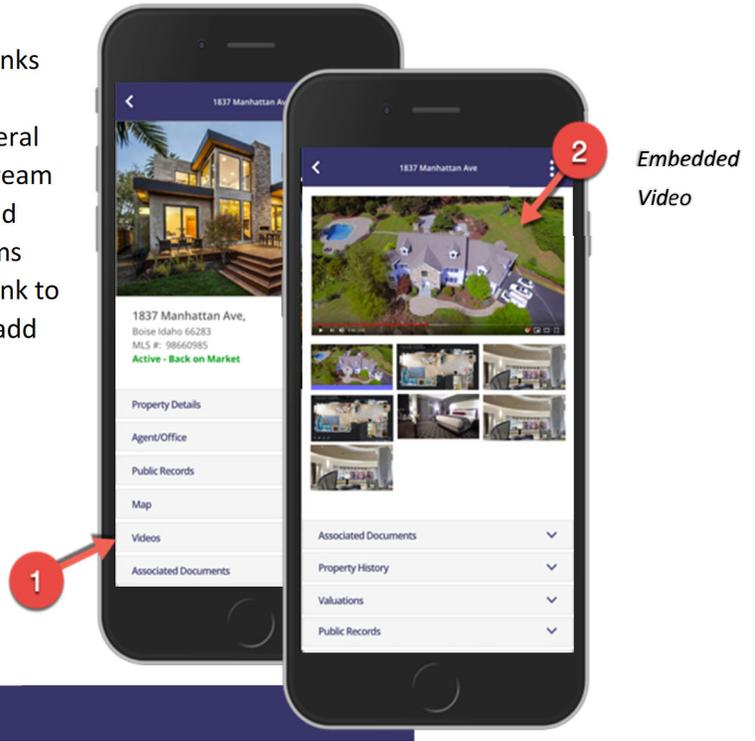
Paragon 5.81 Release Enhancements

Embedded Videos

Action Item: N/A

In a previous release, Black Knight added Live Stream links inside of our applications to help agents show homes during this pandemic. Our research has found that several agents were trying to link to just videos and not live stream events. To help agents even further during this time and beyond, the Paragon Classic and Paragon Connect teams worked on a joint project to allow agents to embed a link to a YouTube or Vimeo videos. Paragon will allow you to add 10 videos links per listing.

Embedded Video

New Video Container
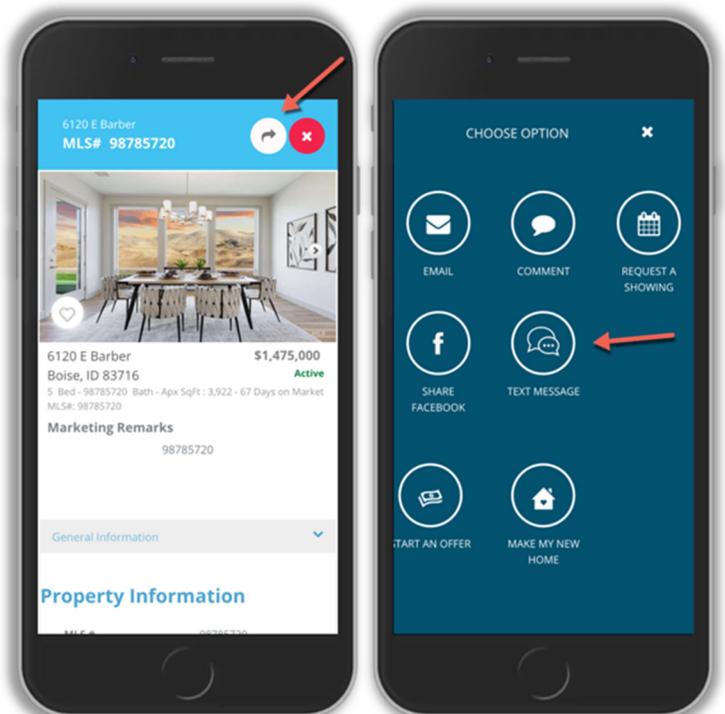
Photo Label & Description

Action Item: N/A

The photo label and description will now show within both the Paragon Connect detail report and the ConnectView (Classic). This will be available both on a small and large form factor.

Collaboration Center Texting

Action Item: N/A

The Collaboration Center is excited to announce that text messaging from a mobile device is now available. When on a detail report you can now go to the options icon and see a new option called "Text Message."

This will open your default native texting app on your mobile device. It will then generate a link to the public version of this report and paste it in a new message. From there, the end user can choose who to send the text message to.

Paragon Affiliate Connect

All options in this section are either configurable via MLS Administration controls or by your System Support Manager as noted.

Corrected Paragon Affiliate Connect Issues

Ticket #	Module	Summary
DEV-3136	Affiliate Dashboard	The help overlay in the affiliate dashboard is now transparent, so it overlays on the dashboard correctly

Association Autonomy – Apply Board/Association Participation/Membership Participation logic

Action Item: N/A

Paragon Affiliate Connect now follows the same membership Participation sharing rules within associations. Both agents and affiliates will be searchable and able to connect based on the Board/Association participation rules applied.

The checkbox for Affiliate Connect participation indicates if a board or association participates in Paragon Affiliate Connect. If they participate the membership participation settings apply. If the association does not participate, none of their members will have access to Paragon Affiliate Connect, or will they be searchable by an affiliate in another association.