Paragon® User Preferences Settings

Paragon®’s User Preferences settings allow you to customize Paragon® to suit your business and your workflow. In order to access the full functionality of Paragon®, you should set up your User Preferences as soon as possible.

User Preferences settings can be accessed via the User Preferences Wizard that initially runs each time you login to Paragon®. The Wizard can also be accessed from the PREFERENCES icon in the Navigation Bar.

► To set preferences via the User Preferences Wizard:

1. Click PREFERENCES in the Navigation Bar and then select Preferences Wizard in the menu that appears.

About the User Preferences Wizard and Tablets

The User Preferences Wizard can be run only on a computer and not on a tablet. However, any preferences settings that you make using a computer will be reflected in Paragon® when you access it using your tablet.

Alternatively, you can use your tablet to configure your preferences without the use of the Wizard by directly selecting a category from the PREFERENCES list on the left side of the menu.*
2. The **User Preferences Wizard** opens. Click **Start** to proceed.

Agent Image Page

3. The **Agent Image** page opens.

4. If you have not yet added an agent image, a REALTOR® placeholder image will be displayed.

5. Click **Update Photo** to add or update your agent image.
6. The **Add or Update Photo** window opens.
   This window will display all the photos in your *Photo Library*. Your Photo Library will likely be empty at this time.

7. Click ![Upload Image](image) and then browse for a suitable image on your computer. The image must be in *JPG* format.

8. Click the desired image to select it and then click **Open** to proceed.

9. If the selected image is larger than about 3MB, the following message will be displayed in the upper-right corner of the page.

   ![Message](image)

   In order to use the image, you will need to re-size it using an image editing application. The **CLICK HERE** link on the *Agent Image* page will direct you to some image editing tools if you don’t have any available.
10. If the image is a suitable size and format, it will be added to your Library.
11. Click the image to select it and it will be highlighted in orange.
12. Click **Insert Image** to use the image as your agent photo.

13. The selected photo now appears on the **Agent Image** page. It will also be displayed in any reports that include the agent image.

14. Click **Next** to proceed to the **Logo Image** page.

**Note:**
The settings on each preferences page are saved when you click **Next**, **Back** or **Close**.
15. Click **Update Office Logo** to add or update your Office Logo.

16. The procedure to upload and insert your logo image is the basically the same as the procedure for your agent image, as described on the preceding pages.

17. Click **Next** to proceed to the **Market Monitor** page.

**Note:** Your office logo is considered to be an advertisement and must therefore be in compliance with the RECA’s Advertising Requirements and CREA’s REALTOR® Code of Ethics (Article 13).

The following checklist from the RECA lists some guidelines for your advertisements:

- Is the full name of your brokerage, as registered with the Council, clearly and prominently displayed and easily readable?
- If a brokerage office address is included in the advertisement, is it the correct address for the brokerage office at which you are licensed?
- If your name is included in the advertisement, is it your licensee name?
- If you have a personal real estate corporation, does the advertisement include the name of the personal real estate corporation?
- If the advertisement contains a team name, has that team name and a current list of team members been registered with the Council?
- Are all the representations in the advertisement current, accurate and verifiable?
- If a promise or offer is made in the advertisement, have any conditions or limitations been indicated?
- If a comparative claim, business volume, honour or award is noted in the advertisement, has the basis of the claim/volume/honour/award, (e.g. the source, date and qualifying information) been included to avoid misleading the audience?

Refer to the RECA website at www.reca.ca for more detailed information.

Please consult with your manager if you need further guidance in this area.
Market Monitor Page

The Market Monitor page allows you to customize the Market Monitor widget. These settings are also accessible via the Edit Widget button on the widget itself.

18. Select the Class(es) of properties that you wish to track.
19. Select the Type(s) of properties that you wish to track.
20. Select the desired Area(s) and Sub-Areas.
21. Use the DEFAULT SECTION drop-down list to select which section you wish to display by default in the widget.
22. Select how many days back to include by default (1 - 7) using the DAYS BACK DEFAULT drop-down list.

23. Click Next to proceed to the Search Options page.
Search Options Page

The Search Options page allows you customize various options related to performing searches.

24. The **DEFAULT SEARCH CRITERIA** setting controls whether or not the default search template is loaded when you start a new search.

   The first time you start a search after signing in, Paragon® will always load the default search template.

   On subsequent searches, it will load your previous search (“Last Search”) if the checkbox is unchecked.

   If the checkbox is checked, all subsequent searches will load the default search template.

   Which setting you choose depends on your preferred workflow. If you prefer to start from a nearly blank template each time you start a search, then you would check the checkbox. If you prefer to use your previous search as a starting point for new searches, leave the checkbox unchecked.
25. The **CUSTOM MAP ADDRESS** setting lets you specify the location on which the map is centered when you start a map search. By default, the map is centered on your office location.

26. Click on [Click to Establish Default Address for Mapping Search](#), if you wish to specify an address other than your office location.

   a. A map window will open. The **Default Address Marker** shows the location of your current default address.

   b. Use your mouse to drag the map to centre it on the location of the new default address.

   c. Click the **Push Pin** icon in the toolbar.

   d. Click on the desired location on the map to specify the desired default location. The Default Address Marker will be moved to that location.

   e. Instead of using the Push Pin, you could instead type the desired address into the **Address Search** field and then click the magnifying glass icon. The Default Address marker will be moved to the selected location.

   f. Once you have specified the desired address by either of the methods described above, click [Save] to save the new default address setting and close the map.
g. Now that you have specified a new Custom Address you still need to check the **Use Custom Address for Mapping Search** checkbox to enable the Custom Address.

You can use this checkbox to switch between the Custom Address and your office address. Paragon® will remember your Custom Address even if you uncheck the checkbox.

27. For the **AUTOCOUNT** setting, make sure the checkbox remains checked.
28. For the **PARCEL LAYER** setting, make sure that **None** is selected.
29. For the **SAVED SEARCH PAGE SIZE** setting, it is recommended that you use **100**, which is the maximum available size.

30. Click **Next** to proceed to the **Results Options** page.
Results Options Page

The Results Options page allows you to set numerous options pertaining to the display of your search results.

31. **DEFAULT HOTSHEET RESULT** allows you to specify which report is displayed by default after you run a Hotsheet search. Available options include Hotsheet Spreadsheet (suggested), Hotsheet Report and Hotsheet History.

32. **DEFAULT SEARCH RESULT** allows you to specify which report is displayed by default after your run a search. You can select from all of the available reports that are offered in the drop-down list. The suggested option is **DEFAULT ML DEF**.

33. **DEFAULT DOUBLE CLICK REPORT** allows you to specify which report to display when you double-click a listing in Spreadsheet view. Only reports that display one listing per page are selectable for this option. The suggested option is **Details Views – Agent View**.
34. **DEFAULT TOUR/OH SEARCH RESULT** allows you to specify which report is displayed by default when you run a Tour / Open House search. Available options include *Tour/Open House Spreadsheet* (suggested), *Tour/Open House Thumbnail*, *T/OH Detail*, and *Tour/Open House View*.

35. **DEFAULT TOUR/OH DOUBLE CLICK REPORT** allows you to specify which report to display when you double-click a listing in Tour / OH Spreadsheet view. Only reports that display one listing per page are selectable for this option. The suggested option is *Specialty Views – Full Detail*.

36. **DISPLAY PHONE NUMBER** – If the checkbox is checked, your phone number will be displayed in any report in which your name is displayed. It is recommended that you ensure this checkbox remains checked.

37. **PREFERRED PHONE NUMBER** shows the phone number that will be displayed along with your name, in your reports.

38. The **GENERAL DISCLAIMER** option has no effect. Appropriate disclaimers have already been added to the reports included with Paragon®.

39. The **SHOW FIELD NUMBER** checkbox should be left unchecked.
40. **SHOW STATS** allows you to choose whether a statistical report will be displayed by default at the top of your Spreadsheets and Reports. When viewing a spreadsheet or report, you can override this default setting by clicking **Toggle Stats** in the **Actions** menu.

41. **SPREADSHEET PAGE SIZE** determines the number of listings to display per page, if **Paged** mode is selected in the **SPREADSHEET PAGE TYPE** setting. The recommended setting is **250**.

42. **SPREADSHEET PAGE TYPE** allows you to choose whether your Spreadsheets are displayed as a single, scrollable page (**Virtual**) or are split into multiple pages (**Paged**). **ML Default** is the recommended setting, which is the same as **Virtual**.

43. **BING MAP PAGE RESULTS** allows you to specify the maximum number of listings to display per page when viewing the **Bing Map** report. The suggested setting is **100**.
   
   When viewing the **Bing Map** report, you can override this default setting with the **Page Size** menu that appears at the lower-left corner of the screen.

   Note that this setting does not affect **Map Search**, which can display a maximum of 200 map pins on the search map.

44. **DEFAULT MEASUREMENT METRIC** allows you to select between kilometers and miles for distances that are displayed on the Bing map page. The recommended setting is **Kilometer**.

45. Click **Next** to proceed to the **User Interface** page.
User Interface Page

The User Interface page allows you to personalize the appearance of Paragon® to suit your preferences.

46. SELECT A THEME offers a drop-down list of various colour schemes, seasonal and other themes including the Canada theme, shown below. These themes affect the appearance of the Navigation Bar and its icons.

To select new User Interface theme:

a. Click to open the Select a Theme drop-down list.
b. Click to select the desired theme from the list.
c. The new theme will be applied to Paragon®, but you will need to complete the Wizard to fully view the theme.
47. If you check the checkbox for **ADVANCED MENU LAYOUT**, menus such as the Action Bar in the Criteria and Results screens will display only icons and no text, as shown below. It is recommended to leave this checkbox unchecked.

![Regular Layout vs. Advanced Layout](image)

48. **BACKGROUND PRINT (CHROME ONLY)** – This checkbox should be checked if you are using Chrome as your browser. Otherwise, it has no effect.

49. **EDITOR FONT FAMILY, SIZE and COLOR** – These settings allow you to choose the default font settings for the rich-text editor, which is used to compose emails. When working with the rich-text editor, you can override these default settings with the formatting controls on the editor’s toolbars.

50. Click **Next** to proceed to the **Contact Manager** page.

### Contact Manager Page

51. The **NUMBER OF CONTACTS TO DISPLAY** setting determines how many contacts will be displayed in the Contact Manager grid. If the number of contacts exceeds the specified number, you will need to navigate between multiple pages. The suggested setting is **250**.

52. Click **Next** to proceed to the **Email Options** page.
**Email Options Page**

The Email Options page is used to adjust settings related to all emails sent from Paragon® on your behalf, including email from auto-notifications, email of listing results and email created via the *Compose Email* link on the home page.

53. **AUTO-FILL BCC** allows you to choose to receive a copy of all emails sent by Paragon® on your behalf. This includes emails resulting from auto-notifications. It is recommended that you check this checkbox so that you can access these emails from your usual email account.

54. **AUTO INCLUDE DEFAULT MESSAGE BODY IN COMPOSE EMAIL** – If you check this checkbox, your default message body will automatically be inserted into every email that you start to compose. It is recommended that you leave this checkbox unchecked, as no single message body is likely to be suitable for all your emails.

55. **READ RECEIPT** is used to request a confirmation from your recipient that they have received your email. It is recommended that you leave this checkbox unchecked.
56. **E-MAIL VERIFICATION STATUS** indicates whether or not you have verified your email address with Paragon®. You should verify your email address as soon as possible in order to access the full functionality of Paragon®. Otherwise, you will not be able to access any functions that involve email. You must verify your email address within thirty days.

57. To verify your email address:
   a. Click [Send Verification] at the lower-right corner.
   b. Paragon® will send you an email message, which should arrive in your Inbox within a few minutes. If the message does not arrive within that time, check your spam or junk mail folders in case the message was directed there.
   c. Open the email message when it arrives. It will contain a link that you must click in order to confirm your email address. Click the link to proceed.
   d. Alternatively, copy the URL and paste it into your browser’s address bar.
   e. Your browser will open a Black Knight page which confirms that your email address has been verified.
f. The **E-Mail Options** page should now indicate that your email address has been verified. (You may need to exit and re-open the wizard for this page to be refreshed.)

58. Click **Next** to proceed to the **Default Notification Recurrence** page.
Default Notification Recurrence Page

This page lets you adjust the default settings for your auto-notification emails. These settings will take effect in the E-Mail Notifications Options window, which you use to set up a saved search with auto-notification.

Note that these preference settings will apply only if you select Recurring in the E-mail Notification Options. If you select Immediately, it will over-ride these settings.

59. It is suggested that you set the NOTIFY TIME to the start of your workday, instead of midnight, which is the initial setting.

60. If you select Weekly in the RECURRENCE SCHEDULE, additional options appear that allow you to select which day(s) of the week the notifications will be sent.
61. If you select **Monthly** in the **RECURRENCE SCHEDULE**, additional options appear that allow you to select which day of the month the notifications will be sent.

![Default Notification Recurrence](image)

62. Click **Next** to proceed when you have finished setting up the **Default Notification Recurrence** page.

63. The **Message Body** page will be displayed.
Message Body Page

The Message Body page allows you to create a message body that can be added to your outgoing emails in Paragon®. When composing an email, you can choose whether or not to insert the message body.

You can optionally define a message body as your default. The default will be automatically loaded into all your emails if you enable the AUTO INCLUDE DEFAULT MESSAGE BODY IN COMPOSE EMAIL setting, as described in step 54 on page 15. However, you are advised not enable this setting, as no single message body is likely to be suitable for all your emails.

64. The Message Body page will initially be blank, as shown below.
65. To create a message body, type a suitable name into the NAME field.

66. You are advised to leave the DEFAULT BODY checkbox unchecked.

67. Next, click in the main editing area of the screen and press Enter/Return to insert a blank line at the start of your message. This will leave some space for links to be inserted above your message body.

68. Now you can enter your message body. The rich text editor includes many functions that are comparable to those of a word processor.

69. When you have finished entering your message body, click Next to save the message body and proceed to the next page.

70. The Email Signature page will appear.
Email Signature Page

The **Email Signature** page allows you to create an email signature that can be added to your outgoing emails in Paragon®.

If you specify the signature as the default, it will automatically be added to all your outgoing emails.

71. Paragon® will create an initial signature for you, based on the information stored in your agent record.

72. You may wish to update or enhance the existing signature, using the various formatting tools in the rich text editor’s toolbars.

    Hold your mouse pointer over an icon in the toolbar to view a tooltip describing the icon’s function.

    You can insert images 📸, links 🌐, and tables 📊 into your signature.

73. It is suggested that you check the checkbox for **DEFAULT SIGNATURE**, so that your signature will be added to all your outgoing emails.
74. When you have updated your signature to your satisfaction, click Next to save the signature and proceed.

75. The Preferences Setup Complete page appears.

76. Click Close to exit the wizard. Note that you can run the wizard at any time if you wish to revise your preferences settings.