

HOW TO SET UP FOR AUTOMATIC E-MAIL FROM PARAGON:

In the agent menu, go into Contact Manager

- Go into prospects
- Click on ADD
- Check the ACTIVE box, then enter first and last name
- Either PROSPECTIVE BUYER or SELLER must be checked
- Click OK at the bottom of the screen
- A prospecting screen will come up with the name.
- Double click on the name just added. This will bring up the PROSPECT
DETAIL screen
- Click EDIT on the contact information line
- Now click NEW under the e-mail addresses line
- Under FORMAT click HTML, unless it is an AOL account
- Enter the e-mail address, and then click OK
- This will take you back to the prospect detail screen. Click DONE.
- Now, click NEW on the saved searches line
- Fill in the information you want on the SEARCH CRITERIA page
- Click SAVE
- Now a SAVE PROPERTY SEARCH window will open
- Enter the name of how you want the property search to be saved
- Now click on ASSIGN in the SAVED SEARCHES line
- Click on the saved search that you wish to use for this client
- Then click SAVE in the upper right hand corner, then OK when the next
window pops up
- This will take you back to the prospect detail window
- Now, there will be an 'N' under NOTIFY
- Click on the 'N'
- This will bring up an e-mail notification screen
- Click on NEW, and this will bring up an e-mail window
- You can type in a message that will appear with each e-mail that Paragon sends
- Click OK at the bottom of the e-mail screen when finished
- You will be returned to the prospect detail screen
- Under the NAME under SAVED SEARCHES, click EDIT
- You will now be back at the SEARCH CRITERIA screen
- Click on SEARCH and you will go into the spreadsheet with all of the matched
searches
- Highlight the listings on the spreadsheet, and click E-MAIL in the right hand
top corner
- Choose your view, select hyperlink
- The normal COMPOSE E-MAIL screen will appear. Type in the e-mail
address and send the e-mail. NOTE: You MUST send an e-mail
manually the first time for the auto e-mail to go into effect!