Paragon Connect User Documentation

Functional Overview

2024

ICE.

1. System

1.1. Access Points

Access to the Paragon Connect MLS system is accomplished by using a unique Login Name and Password. Passwords may be imported from external membership systems provided that the data is available from the third-party vendor.

Paragon Connect is accessed via a customer-specific, direct URL and is accessible from most laptop, tablet, and mobile devices.

Additionally, Paragon Connect can be accessed via the Main Menu in Paragon Professional and via the Access Paragon Connect link located on the login screen of Paragon Professional (if applicable).

Both single and multi-login options are available to the MLS organizations. Users will also be logged off automatically after a period of inactivity, the length of which may be configured by the MLS.

1.2. User Access

Active users within authorized Security Levels may authenticate to the Paragon Connect MLS system. Each user is assigned one of 10 Security Levels. Each security level is permitted different controls of access within the Paragon Connect MLS system.

Security Level	Security Controls
0	No system access.
1	No access to Paragon Connect. RETS/API access is permitted.
2	Full search capability. No Listing Input access.
3	Full search capability. Limited Listing Input access.
4	Full search capability. Full Listing Input access.
5	Full search capability. Full Listing Input access. Office access.
6	Full search capability. Full Listing Input access. Firm access.
7	Limited system & board admin access.
8	Full system & board admin access.
9	Reserved for ICE employees.

1.3. Branding

An MLS that has contracted for Paragon Connect MLS services can provide a single logo graphic that will be used for branding their login page.

An MLS can also have a full screen background image that can be used on the system login page. There are several default images, or the MLS can provide their own image which can be uploaded on their behalf.

1.4. Menu

Menu including:
- Information regarding current user
- Information describing the current version of the application
- Log out feature
- Options to launch specific product modules

1.5. Assume Identity

System may be configured to allow users the ability to assume the identity of other users. Multiple levels of authorization are supported at the system level.

2. Paragon Connect Landing Page

2.1. Dashboard

The landing page serves as a dashboard including:
- Display of current user's Agent Image and Office Logo
- Contact Activity highlights for the last 7 days
- Seller Dashboard with Listing Activity reporting and Competition
- View for reading and responding to recent contact comments
- Quick Action links to primary features
- Power Search that provides auto-display of matching results for listings, agents, offices, searches, and contacts
- Access to and notice of new MLS Messages
- Access to and notice of new Hotsheet Alerts
- Near Me Search
- Inventory view with access to listing maintenance

2.2. MLS Message

The display of MLS/Association/Board initiated messages. Notice of unread messages is displayed to the user on the dashboard.

3. Property Search

Multiple search options are available from the menu including:
- Property search per class
- Near Me
- Hotsheet
- Tour and Open House

3.1.   Class Based Searching

Traditional search form used to locate listings based on prospective buyer search criteria.
Key Features:
- Search by Class or Multi Class
- Map results displayed as a best fit
- Auto complete forms or expand to view more options
- Search fields and layout editable by user
- Save search
- Setup Prospecting Notifications

3.2.   Location Based Searching

The location-based method, called Near Me, is used to locate listings based on your current location or a specific address. The map acts as a filter and will refresh results based on any zooming or panning around the map. Users can further filter results by adding additional criteria. Users may save, modify, rename, and delete saved searches.
Key Features:
- Search around your current location
- Use any custom address to locate listings
- Map filters results as you pan or zoom
- Can add search criteria to further narrow results
- Draw shapes – Freehand, Polygon, Rectangle, Radius
- Manage shapes – Hide, edit, exclude, delete
- Save Search
- Setup Prospecting Notifications

3.3. Saved Property Searches

The saved property search feature offers users the ability to save property search criteria. These named searches can be associated with a prospect/contact. Users may save, modify, rename, and delete saved property searches.

3.4. Hotsheet Search

Hotsheet allows users the ability to search for listings where specific listing changes have occurred, like status or price changes within a defined timeframe. Users may save, modify, rename, and delete saved hotsheet searches.
Key Features:
- Days back and date range search
- Results based on last run date
- Additional search filters
- Save, edit, rename, delete searches
- View hotsheet type, date, comments
- Hotsheet Alerts

3.5. Hotsheet Alerts

The Hotsheet alert feature allows an agent to save up to ten hotsheet alerts. These alerts let users know when new updates are found matching the saved criteria. A pink badge appears on the Alert icon (fire icon) in the top app bar of the homepage indicating new updates are found.

3.6. Tour and Open House Search

Search Tours and Open Houses to identify listings with upcoming events. Results include listing information, event type, date and time of event, and other provided details. Users may add events to personal default calendars on their device.
Key Features:
- Days forward and date range search
- Search by event type
- Additional search filters
- Save, edit, rename, delete searches
- View event type, date, comments

3.7. Run Last Searches

The overflow menu from property search allows users to access the last Five Searches run by the user, even if the search has not been saved.

4. Search Results and Views

Paragon Connect provides a variety of views to display listing results including:
- Thumbnail view
- Spreadsheet view
- Map view
- Results Analytics view
- Detail view

4.1.   Thumbnail View

Default View for listing results. Includes primary photo and basic listing details. Photo links to listing details.
- Link for additional photos
- Sorting
- Listing selection

4.2.   Spreadsheet View

Spreadsheet View for listing results. Includes options to sort by columns, modify displayed columns, and reorder columns of data.
- Listing selection
- Export

4.3.   Map View

Map View for listing results. Includes ability to filter results by geographic shapes, apply map overlay features, change map types, and view additional information for parcels when available. Listings appear as pins based upon their saved location data.
- Alternate visual options like Street View
- Tax Mode, when available

Map types include: night mode, silver mode, and retro mode.
Map Layers may include:
- Parcels
- City
- County
- Flood Plain
- Postal Codes

4.4. Results Analytics View

Graphical representation of listing results. Includes individual widgets for charting listings by key data elements, like Price, Status, etc.
- Export of individual chart widgets
- Print view

4.5. Detail View

The Detail View combines listing data and public record data into one report. This view may also contain:
- Photo gallery
- Map and Street Map of listing
- Videos
- Listing Information
- Public Record
- Listing Documents
- Tour and Open Houses
- Property History
- AVM's
- Mortgage Calculator
- Community Reports

5. Listing Results Actions

Paragon Connect offers a range of actions for listing results including:
- Share
- Add To Cart
- Add to CMA
- Recommend
- Driving Directions
- Third Party Integrations
- Print
- Report Listing Issue
- Edit Listing/Edit Photos when authorized

5.1. Share Listings

Users can distribute listings through a variety of channels. The system generates a link for selected listings that can be copied and shared via text or email. Paragon Connect also offers integrations with Facebook and Twitter, enabling users to directly share listings on these platforms.

5.2.   Listing Carts

Users can create listing carts and add chosen listings to these carts for better organization and review. Users have the capability to generate multiple Listing Carts, each of which can house multiple listings. The system allows for the addition, modification, or deletion of these carts as well as managing and removing individual listings within each cart.
Key Features

- Add, modify, delete listing carts
- Collect and store several listings in a cart
- Remove and manage listings in a cart
- Add listings to multiple carts
- Email, text, copy link, and share listings
- Use listings in cart to add as comparables to EasyCMA
- Add notes to any cart

5.3.   Recommend

Users may use the Recommend feature to send specific listings to their clients directly within the platform. This feature generates an email to the selected contact and add the listing to the contact's collaboration center.

5.4.   Driving Directions

Users may select one or more listings and use the integrated feature to generate driving directions.

5.5.   Third Party Integrations

Paragon Connect support optional integrations with multiple third-party vendors. These integrations can be enabled for all users or for defined sub-sets of users. These links may utilize SSO capabilities or be configured to pass user or listing values.

5.6.   Printing Reports

The default Agent and Consumer listing views are available for printing. Additional, specific reports can also be configured for printing listing data.

6. Contacts

Paragon Connect provides users the ability to add and manage clients through the Contacts module. Contacts can be defined as Buyers and Sellers. This feature tracks searches assigned to contacts, management of notifications, contact communication, and contact activity.

Contacts enabled for prospecting have access to their own Collaboration Center site for viewing listings, searching, and communicating with their agent.
Key Features:

- Add/Edit/Delete contacts
- Email, Call, or text contacts
- Manage prospecting notifications per saved search
- Access buyer/search activity
- Create and link search to contact
- Assign listing to contact for Seller features
- Enable Agent Preview for contact
- View message history
- View Collaboration Center communication history
- View Collaboration Center site associated to contact
- View seller report
- Manage saved searches associated to contacts
- Recommended listings
- Archive Listings

6.1.   Collaboration Center

Collaboration Center offers a unique webpage dedicated to each Contact. Each Collaboration Center site displays listings matching the defined search criteria with options for the client to set them as a Favorite, Possible or Rejected listing. Clients will also be able to send and receive comments directly to and from the Agent for each individual listing. Once a Contact is setup with a Saved Search the user will have access to the controls to setup Email Notifications or Collab Center sites.

7. Listing Input and Maintenance

The Listing Maintenance Module provides user access to their authorized published and unpublished listings. Listing maintenance includes access to all property fields, lookup options, geographic information, and additional data sources. Users may add new and modify existing listings.
Key Features:

- Add listing
- Auto-tax fill from authorized tax providers
- Copy listing
- Edit existing listing
- Add/edit unpublished listing
- Error tracking and data validation using defined Field Rules and Requirements
- Document maintenance
- Tour and Open House maintenance
- Validate map location

- Listing photo maintenance
- Delete listing
- Share listing
- Search for any field within the form
- Filter required only fields
- Use auto complete or search lookup modals to find data
- View listing detail
- Filter listings by Status, Class, or pre-defined options like My Listings, My Office Listings, My Firm Listings, My Team Listings

7.1.   Manually Add Listing

Users can be authorized to add new listings to specific property classes.

7.2.   Tax Autofill

The Tax-Autofill feature in Paragon Connect uses configured public available record data to pre-populate defined values when starting a new listing.

7.3.   Copy Listing

Users may choose to start a new listing by copying their own existing listings. The copy feature includes key details, photos, and associated documents. The system can be configured to define which field values are eligible for the copy process.

7.4.   Error Tracking

Listing form validates content based on rules and configurations set by the organization. These business rules drive the accuracy of submitted listing data. If an error is found the system will display the error below the field. The listing will not be saved to the system until all errors are resolved.

7.5.   Upload Documents

Users may upload one or more documents to their listing. Document types including Word, PDF, Excel files, images are supported. Documents may be marked as public or private and may include a description or document type of the file uploaded.

7.6.   Open House and MLS Tour

Users may schedule one or more events for their listing. Event options include Open Houses which are visible for public display and Tours which are private for professional display. Open

Houses and Tours may be configured to include specific dates, times, directions, refreshments, and comments pertinent to property listings.

7.7.   Validate Address Location

All new listings are mapped automatically by a geocode process. The validate address location tool allows users to verify or adjust the location of their listing on a map. Users drag the displayed pin on the desired location for a manual placement of the pin.

7.8.   Third Party Integrations

Paragon Connect support optional integrations within the maintenance module with third-party vendors.

7.9.   Listing Photos

Paragon Connect incorporates photo management capabilities allowing users to upload images to their listings and provides the flexibility to reorder and replace photos as well as add labels and descriptive annotations.

7.10.   Enhance Photos

Paragon photo maintenance includes options to crop, flip, rotate, and color correct photos. You can add photo elements like shapes, icons, text, arrows and more to highlight areas of a photo that might be of importance to the agent or consumer.
Key Features:
- Crop, flip, rotate photos
- Add a shape from the provided library
- Add an icon from the provided library
- Place custom text on your listing photos
- Free hand draw on the photo
- Modify visual appearance of the photo
- Delete one or more photos

7.11.   Listing Photo Labels

Each listing photo can have a Label and Description. The MLS can elect to allow for the display/entry of either Label or Description. A lookup table for the Label field can be setup with default values for entry via inline auto-completion of the values for the Label field only. This table can be managed by the MLS Administrator.

7.12.   Virtual Stage / Enhanced

The application incorporates a feature called 'Virtual Stage / Enhanced', designed specifically to manage and identify listings that have undergone virtual modifications. This tool allows users to specifically tag photos indicating that their visual presentation has been digitally altered or enhanced. Once tagged the photo includes a watermark to show the listing has been staged or enhanced.

7.13.   Price Analysis

Listing maintenance offers a Price Analysis tool that provides a count of all contacts whose search criteria matches the details of the current listing. The tool allows users to virtually adjust the listing price to identify the number of potential buyers at different price points. Automated Valuation Model (AVM) data is also available to aid in identifying the most favorable listing price.

8. Interactive Public Records

8.1.   Interactive Parcels

Map views within Paragon Connect may include the display of a parcel layer. This layer displays the boundaries for parcels within the system's market. Parcels may be selected individually to display additional parcel details.
Key Features:
- View and select parcel
- Display full public record data on property
- Propensity Score
- Estimated Loan to Value
- Estimated Equity
- AVMs (may include AVMs provided by Black Knight and third parties)

8.2.   Property Watch

Paragon Connect allows users to select parcels via the map view and initiate a watch on the property. Watched properties are available under the My Content section. Users can receive email alerts on public record changes to their watched properties. Alerts received since the property watch was enabled are available on the user's Public Record Detail View.

8.3.   Propensity Score

The Propensity to List value may appear for Premium Tax users. The feature uses a proprietary algorithm that considers a variety of data to include Sales History, Loan to Value Ratio, Estimated Equity, Owner Occupied, Foreclosure Activity and Neighborhood Trends and assigns one of the following scores that reflects the probability that a property will be listed for sale: Low, Medium, High, Very High and Listed.

9. Mortgage Calculator

The Detail View in Paragon Connect includes a mortgage calculator. This allows the agent to calculate monthly mortgage payments. The Agent can choose and adjust the term and interest rate, along with the purchase price of the home and down payment amount.
Key Features:

- Enter purchase price of home
- Down payment amount
- Terms - 15 or 30yr
- Interest rate
- Calculates estimated monthly payments

10. EasyCMA

Built within the Paragon Connect framework, and integrated within Paragon Professional workflows, EasyCMA allows users to create and distribute digital and PDF CMA reports within a highly automated workflow.
Users have the option to rely on processes such as: automated comparable property generation, automated report-building, automatically applied default adjustments, and automatic application of user and system settings. EasyCMA also allows for manual interventions in comp selection, adjustments, filters, and specific report sections.

For customers subscribed to CRS or SiteX Public Records Data, EasyCMA provides an optional setting to include public records comparables in the CMA report.

11. Membership Search

Membership Search provides options to query agent and office records. Results include links to view detailed roster reports and views include quick actions to call and email.
Key Features:

- Search for agent name
- Agent Type
- Agent Status
- Office name
- Office city/state

12. Resources

Links to third-party vendors or external sites may be configured to display within the Resource menu. These links may utilize SSO capabilities.

13. System Documents

Dedicated module for uploading and storing documents to be made available to all users. Options for enabling additional document uploads for Boards, Firms, and Offices.

14. Settings

The settings module offers configuration options to tailor and personalize the platform experience. Users can modify their profile, update office logos, adjust phone and email settings, and more.

Key Features:
- Office Logo
- Phone Settings
- Change Password
- Email Settings
- Social Media
- Your Story
- Grant Identity
- System
- Result Options
- Time Zone
- Automated Valuations
- Collaboration Center
- Display Settings
- Links
- Consumer Search
- Agent Notifications
- Client Notifications
- IDX/VOW Information

15. Statistical Reporting

Paragon Connect offers multiple Statistical Reports providing information for the Agent, Office, Firm, MLS, and Market. This module includes configurations affecting visibility and calculations. The Statistical Report module opens in a separate browser window or tab from the main system.

Key Features:
- Performance and Ranking reporting at Agent / Office / Firm Levels
- Market Statistics
- Tabular and Graphical Options
- Export to Excel Option

Statistical reports include, but are not limited to:

15.1. Price Comparison

Displays a Listing Count and Days on Market breakdown of listings grouped by Status Category and sorted by system-determined price ranges. Summary data per each Status Category includes number of listings, average days on market, median price, average price, maximum price and minimum price.

15.2. MLS Statistics

This report displays MLS statistical data in comparison to the selected Agent, Office or Firm. Comparisons include active and sold transactions by number of listings, dollar volume, and price averages. Note: For office calculations, branch offices are listed separately. For firm calculations, branch offices are combined under the main office.

15.3. Agent Ranking

This report displays a ranking of Agents within the selected entity (Office, Firm or MLS) by Units or Volume. The ranking is in descending order and produces the top Agents based on the selected number of records to report.

15.4. Office Ranking

This report displays a ranking of Offices within the entire MLS by Units or Volume. The ranking is in descending order and produces the top Offices based on selected number of records to report. Note: For office calculations, branch offices are listed separately.

15.5. Firm Ranking

The Firm Ranking report displays a ranking of Firms within the entire MLS by Units or Volume. The report is displayed in descending order and produces the top Firms based on selected number of records to report. Note: For firm calculations, branch offices are combined under the main office.

15.6. Volume Ranking

This report displays a ranking of Agents, Offices, or Firms based on the number selected to report. Data includes Units and Volume for List Side, Sold Side and Total. Report can be run by Listing Side or Selling Side and can be ranked by Units or Volume. Note: For office calculations, branch offices are listed separately. For firm calculations, branch offices are combined under the main office.

15.7. Sales Detail

The Sales Detail report displays the dollar value of the listings sold by an Agent and the listings they listed but others have sold. Data displayed includes listing number, listing Agent and Office, sold Agent and Office, and volume for the selected entity.

15.8. Market Statistics

The Market Statistics report displays number of active listings, average list price and average days on market by class of property and bedrooms for the current active market. In addition,

properties listed within a date range entered are compared to properties sold and expired within that same date range. Comparisons including number of listings, percentages, price averages, and average days on market are used. This section of the report is also displayed by class of property and bedrooms.

15.9.   Year to Year Report

This report displays the Quantity Sold, Volume, Average Sale, Median Sale, Quantity Active, and Percent Changes for sales from a current specified date range against sales from the same date range of the previous year. This report can be grouped by four levels of data including Class, Area Group, Area or Field (as determined by MLS) with sub totals for each grouping.

15.10.   Statistical Reporting Graphs

Nine graphs are available in the Statistical Reporting module. The same search interfaces on the Statistical Reporting Module reports are available to generate the graphs.
Options are available to display the graphs in Color or Black and White, in 2D or 3D style. They can also be exported out of Paragon as one of the following file formats: BMP, GIF, JPEG, PDF, and PNG.

16.   Site Administration

System administrators have access to modify and configure a range of functionality for the application. Additional configuration is performed and maintained by Black Knight. Administrators have permission to access and maintain data including listing, user, and office records. Administrators also have access to establish and maintain content available via RETS/API. The Administration module opens in a separate browser window or tab from the main system.

Key Features:
- System Setup
- User and Office Maintenance
- RETS Administration
- WebAPI Administration
- MLS Messaging
- Listing Data Setup
- Listing Audit
- Administrative Reports

16.1.   System Setup

Paragon Connect offers administrators options to modify global system functions. These include settings for enabling/disabling features, establishing visibility restrictions, defining user permissions, and managing Association Autonomy options.

16.2.　Maintaining Agents and Offices

Administrators can add, modify, transfer, or delete any agent or office found in the Paragon connect system. Administrators can view an audit of changes made to agent and office records. Options to maintain firms and teams are also available if needed.

16.3.　RETS and WebAPI Administration

Provides ability to add, modify, or delete profiles used to manage content available to authorized users via RETS or WebAPI access.

16.4.　MLS Messaging

Provides ability to add, modify, or delete any news material or bulletins to appear to users through the Alert option on the dashboard. Administrators can send messages to all or select groups of users.

16.5.　Listing Data Setup and Modification

System Administrators may modify, add, or delete any field, lookup, feature, or area used in the Paragon Connect system. Fields can be eligible for display and/or search purposes. Administrators can also establish field security, conditional logic rules, and any ERMS relationships from this section. It's advised to contact BLACK KNIGHT Staff before making modifications to data fields in the system.

16.6.　Listing Audit

Listing Audit reports trace all modifications to a listing and display the Agent who made the modification and the date the change was made. The audit Version number can be clicked to view a full report with all changes highlighted by color coded lines for Date Changed, Date Added and Date Removed.

16.7.　Administrative Reports

A variety of administrative reports are available. These include logins audits, RETS usage, prospecting, and nightly activity reports.