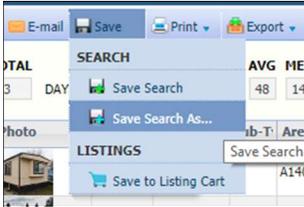


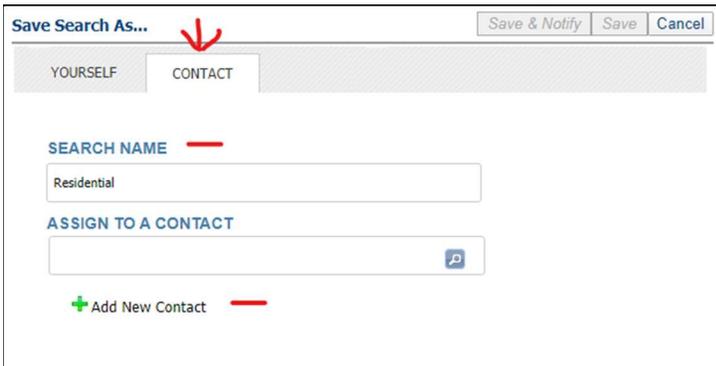
# Set up Collab Center for Buyers

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

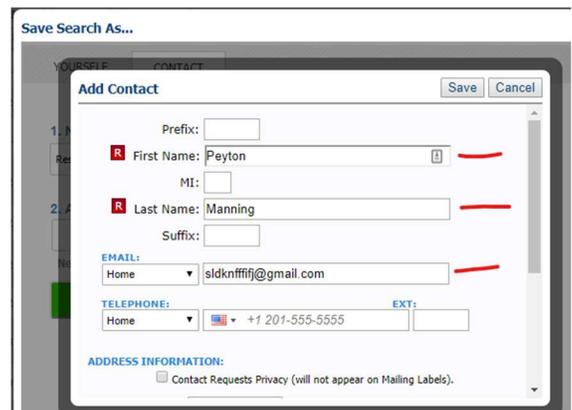
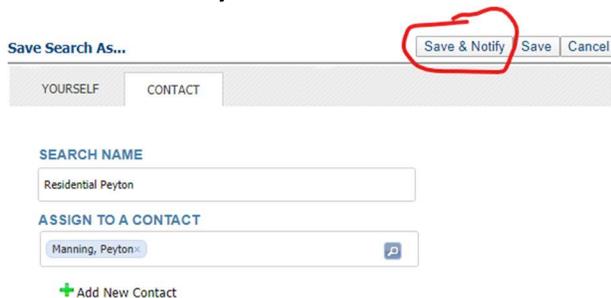
1. Go to **Search > Residential** (or whatever property type they need)
2. Enter your criteria
3. Click **Search**. Review results to ensure they are what is needed.
4. Click on **Save > Save Search As...**



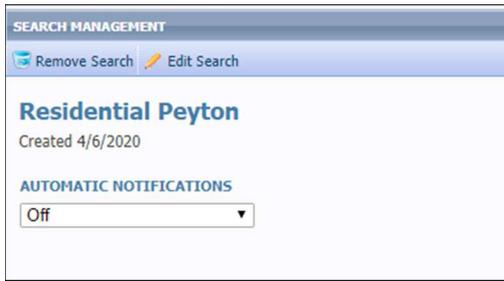
5. Click on the Contact tab of the window that opens.



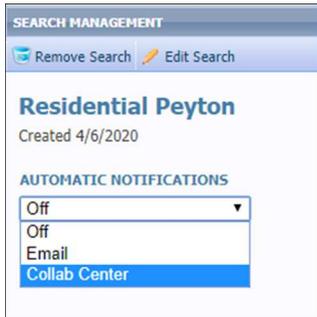
6. Name the search. It is personal preference.
7. Click on the **Add New Contact** link
8. When the window opens, enter name and email address – the rest can be left blank if desired. The full name does not need to be entered – it can be a single letter, a nick name or whatever BUT remember the client will see it at some point. Enter a phone number if you would like to be able to Text them listings in the future.
9. Click **Save**
10. Click **Save & Notify**



11. The Search Management page should open



12. Click on the drop-down box under **AUTOMATIC NOTIFICATIONS** and choose **Collab Center**



13. The default is to send them notifications Immediately. If you want to change that, click on the **Settings** button

14. Click on **Recurring** under **CLIENT NOTIFICATIONS** and then **Modify Time Frame** to setup how often to send notification. It is recommended that users DO NOT put their agent email in the Bcc: field if the **AGENT NOTIFICATIONS** are turned on. Click **OK** to save.

15. Once that is done, click on the **Send Welcome Message** button



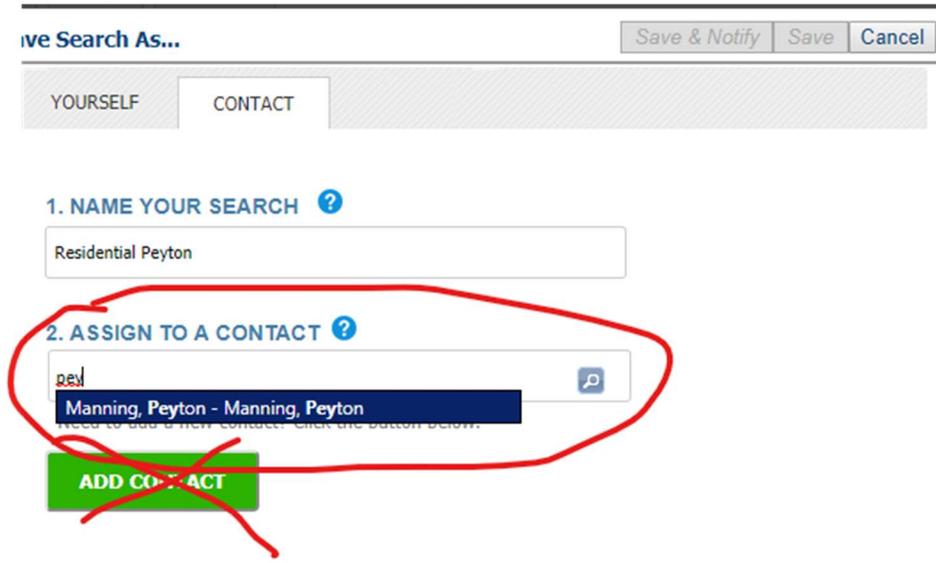
16. An email window opens. The *Subject* line can be changed if desired. Nothing needs to be typed in this window – there is a pre-made system email that goes out – but another message may be added if desired. Click **Preview** to see the message before sending. Click **Send** to send the link to the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



17. 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.



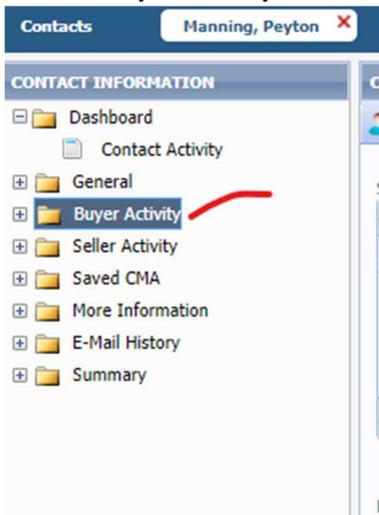
3. Once their name shows in the box, continue with **Steps 10-17** in Section 1.

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

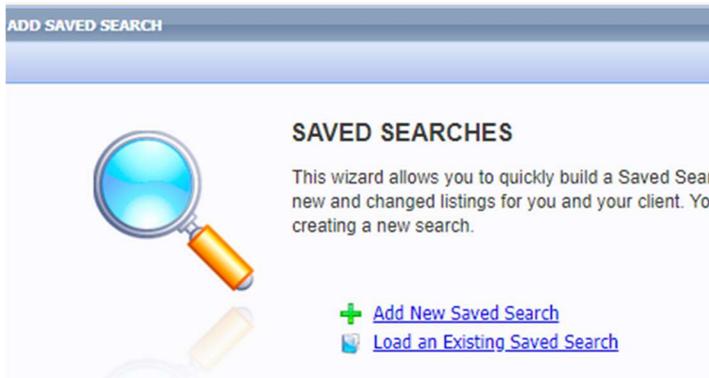
1. Go to **Contacts > View/Manage Contacts**
2. Click on the contact's name

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!