

Day	Start and Stop Times	Length	Description of Class
Wed Oct 30	8:30 AM to 10:00 AM	90-min	<p>Preference Wizard – General Member Branding and Functionality Settings</p> <ul style="list-style-type: none"> • Add Agent Image and Office Logo – display on Property Reports, Emails, CMA and more • Setup Market Monitor – Home Page Quick Hotsheet • Setup Search options – Set Default Search as starting search, Map Search centered location, Boundary Map Selection, Parcel Lines & IDs – Y/N, Default Map View, Save Search Page size • Results – Default view for Hotsheet Searches, Property Searches, Open House/Tour Searches, MLS # Click – Secondary Reports, Display Agent Phone #, Show Stats, # of Listings per Page • User Interface – Theme of Big Buttons, Font Family, Font Size and Font Color for composing • Contact Manager – # of contacts per Page and Contact Activity Widget Days Back setting • Time Zone and Calendar – Display: Listing Expiration Date, Contact Tasks and Tour/Open House Date <p>At the start of this class, I will show how to do Auto Tax Fill.</p> <p>I will also show Auto Tax fill during the CMA class.</p>
	10:30 AM to 12:00 PM	90-min	<p>Searches, Mapping and Results</p> <p>Searches:</p> <ul style="list-style-type: none"> • How to add criteria into each field type (Range, Lookup, Free Form Text, Features & Map) • Specialty Fields – Multiple Address, Feature Search, Map Search • How to Customize a Search, Saved Search Tips, How to Find a Saved Search <p>Results</p> <ul style="list-style-type: none"> • Spreadsheet Functionality – Filter, Sort, Top of the Column Sort, Customize, Email, Print, Collab Share Link, Export and More Actions • Property Reports – Review the different folders and report types and how to Customize a Property Report.
	12:00 PM to 1:30 PM	90-min	Lunch
	1:30 PM to 3:00 PM	90-min	<p>Collab Center – Buyer Side</p> <ul style="list-style-type: none"> • Explore Collab Center Functionality – Buyer and Agent – exactly the same • How to UPGRADE and Email Notification to Collab Center Notification • How to Add a brand New Prospect to Collab Center • Collaboration Center Preference Wizard
	3:30 PM to 5:00 PM	90-min	<p>CMA – How to Create a CMA Presentation Packet</p> <ul style="list-style-type: none"> • See a Completed CMA Presentation Packet • Create a CMA Presentation from beginning to End <ul style="list-style-type: none"> ○ Add a Subject Property with Auto Tax fill ○ Add a Seller ○ Add Comps ○ Add Adjustments – Calculated and Manual Adjustments ○ Page Layout Settings and Presentation Setup ○ View/Generate Presentation with Output via Print and Email as a Hyper-link

Day	Start and Stop Times	Length	Description of Class
Thurs Oct 31	8:30 AM to 9:30 AM At the start of this class, I will show how to do Auto Tax Fill.	60-min	<p>Paragon Connect – Paragon’s NEW Mobile tool for Smart Phones and Tablets (and Desk top computers also) This is an Agent–Only tool. This is not a Client tool.</p> <ul style="list-style-type: none"> • How to Login. • Responsive Design – Fits the device you are working on without shrinking the content size. • New Home Page – Consolidated display of Client Actions. • Settings Button functionality. • Hamburger Menu functionality <ul style="list-style-type: none"> ○ Property Searches ○ Hotsheet Searches ○ Contact Manager ○ Member Search ○ Tours and Open House Searches ○ Help ○ Logout
	10:00 AM to Noon	2-hr	<p>Collab Center – Buyer Side & Seller Side</p> <ul style="list-style-type: none"> • Explore Collab Center Functionality – Buyer and Agent – exactly the same • How to UPGRADE and Email Notification to Collab Center Notification • How to Add a brand New Prospect to Collab Center • Collaboration Center Preference Wizard • How to Setup Seller Side Collab Center
	Noon to 1:30 PM	90-min	Lunch
	1:30 PM to 3:00 PM	90-min	<p>Listing Input & Maintenance</p> <ul style="list-style-type: none"> • How to Add a Listing <ul style="list-style-type: none"> ○ Tax Auto Fill Demonstration ○ Add Listing Details ○ How Map or GeoCode any Property ○ How to Add Associated Documents/Disclosures ○ How to Save listing as a Partially Saved Listing ○ How to View Details – Courtesy Email to Seller • How to Publish a Listing <ul style="list-style-type: none"> ○ How to Add an Open House/Tour ○ How to Apply 3rd Party Integrations to the Listing • How to Maintain a Listing • How to Associate a Property to the Seller for Collaboration Center – Seller’s Side

	3:30 PM to 5:00 PM	90-min	<p>Appraisers and Paragon</p> <ul style="list-style-type: none"> • Customize the Search Criteria Screen to be Appraiser facing rather than agent facing. • How to add criteria into each field type (Range, Lookup, Free Form Text, Features & Map). • How to Save and Find their Saved Searches. • How to Create their own Default Saved Search. • Spreadsheet – How to Customize Spreadsheets for their Appraisal work. • How to use the Market Conditions Addendum report. • How to get the results out of Paragon via Print, Email and Export as a .CSV spreadsheet • Other reports that may be of interest.
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This is a work-in-process document. We can continue refining the class topics and content, if you want.