



Paragon Affiliate Connect Getting Started Guide Agent/Broker

Getting Started - Paragon Affiliate Connect

Your MLS has just installed a new tool for you to use called Paragon Affiliate Connect! This is a unique opportunity for you to develop and strengthen your affiliate connections. You will no longer need to carry around a bunch of business cards for the affiliates you work with, you can now have access to them directly from your Paragon system.

You will be able to connect and communicate with your affiliates to strengthen your partnership.

You will be able to automatically send them key notifications on your listing and buyer activity.

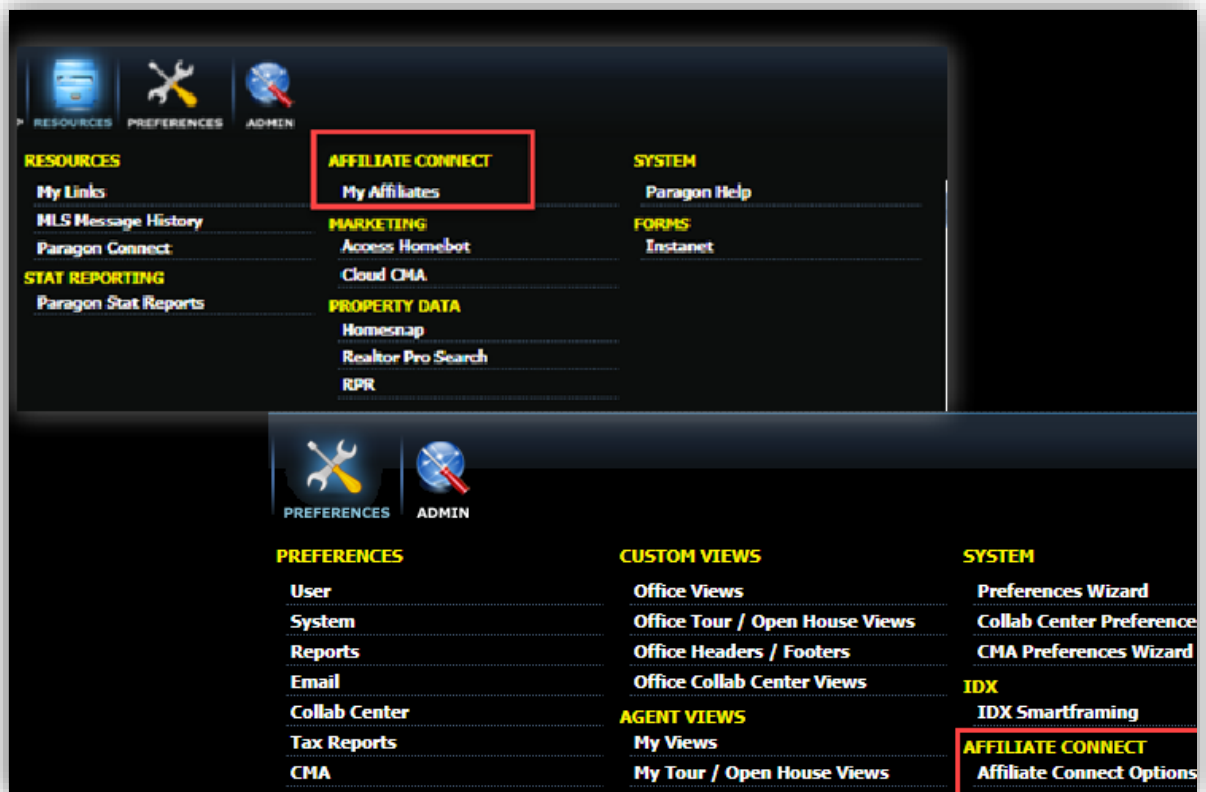
Your consumers will be able to view your affiliates through customized branding blocks directly from their Collaboration Center.

So, let's get started! [Click here](#) for a quick video on how it all works!

Getting your connections set up

You can connect to affiliates that you work with and choose what information you want to share with your affiliates.

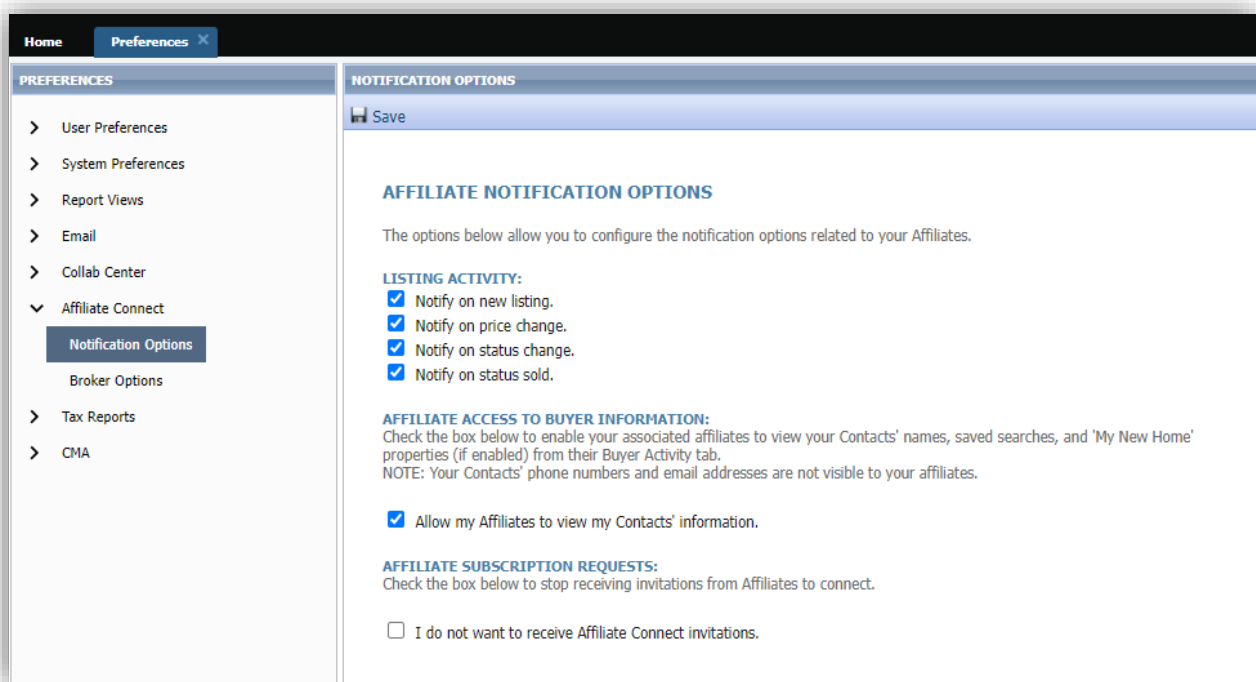
The new menu options will be available in Paragon, under Resources> My Affiliates and under Preferences> Affiliate Connect Options.



Affiliate Connect Options

Affiliate Connect Options determine what information you would like to share with connected affiliates. You can choose to share your listing activity and/or buyer activity. For buyer activity, you can also choose if you would like to share your buyer names with your connected affiliates. Buyer contact information such as email address or phone number, is never automatically shared in Affiliate Connect. If you want to share a specific contact's information with one of your connected affiliates, we have added a new share option in Contacts.

You can also determine the type of email notifications your connected affiliates will receive regarding your listings and contacts. The information you choose to share with your affiliates will also be available to them via their Affiliate Dashboard.



The screenshot shows the 'Preferences' tab in the Paragon Affiliate Connect interface. The left sidebar lists various preference categories, with 'Affiliate Connect' expanded to show 'Notification Options'. The main content area is titled 'NOTIFICATION OPTIONS' and includes a 'Save' button. It contains three sections of settings:

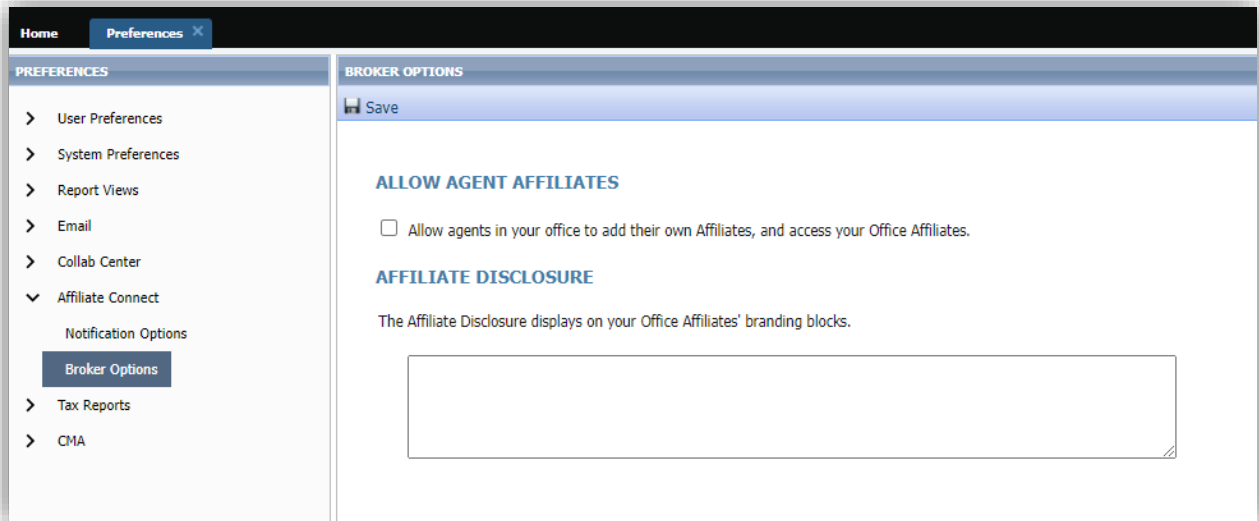
- AFFILIATE NOTIFICATION OPTIONS:** A heading followed by the text 'The options below allow you to configure the notification options related to your Affiliates.'
- LISTING ACTIVITY:** A section with four checked checkboxes:
 - ☒ Notify on new listing.
 - ☒ Notify on price change.
 - ☒ Notify on status change.
 - ☒ Notify on status sold.
- AFFILIATE ACCESS TO BUYER INFORMATION:** A section with the text 'Check the box below to enable your associated affiliates to view your Contacts' names, saved searches, and 'My New Home' properties (if enabled) from their Buyer Activity tab.' and a note: 'NOTE: Your Contacts' phone numbers and email addresses are not visible to your affiliates.' Below this is a checked checkbox:
 - ☒ Allow my Affiliates to view my Contacts' information.
- AFFILIATE SUBSCRIPTION REQUESTS:** A section with the text 'Check the box below to stop receiving invitations from Affiliates to connect.' and an unchecked checkbox:
 - ☐ I do not want to receive Affiliate Connect invitations.

Paragon Affiliate Connect

If you are a Broker or a Broker Manager you will have an additional options in Affiliate Connect preferences.

The broker can decide if they want their agents to be able to add affiliates or if they only want affiliate connections at the broker level. If the top box is checked then agents can attach at the agent level and brokers can attach to affiliates at the office level.

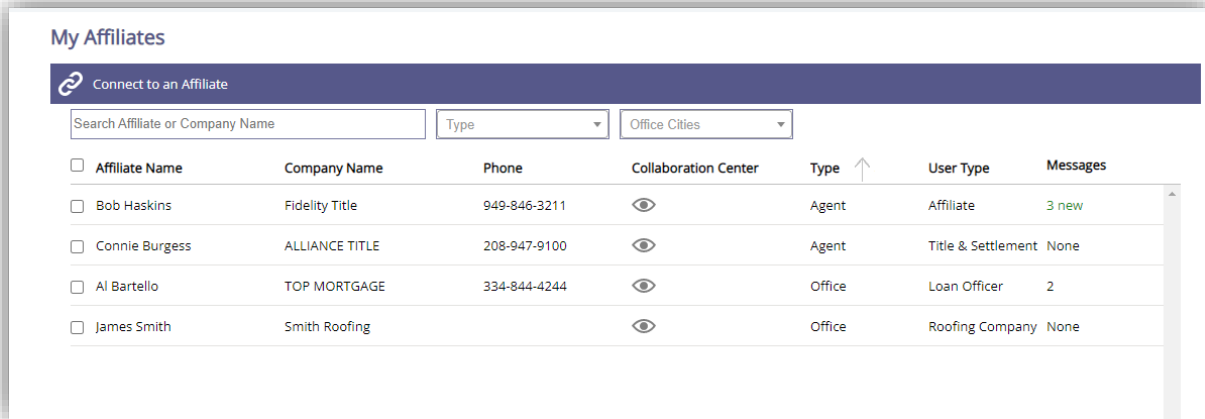
The second selection is if the broker would like to add a disclosure to the office affiliates. This disclosure would display on the office affiliate



The screenshot shows the 'Preferences' page in the Paragon Affiliate Connect system. The left sidebar contains a list of preference categories: User Preferences, System Preferences, Report Views, Email, Collab Center, Affiliate Connect (expanded), Notification Options, Broker Options (selected), Tax Reports, and CMA. The main content area is titled 'BROKER OPTIONS' and includes a 'Save' button. Under the heading 'ALLOW AGENT AFFILIATES', there is a checkbox labeled 'Allow agents in your office to add their own Affiliates, and access your Office Affiliates.' Below this, under the heading 'AFFILIATE DISCLOSURE', there is a text box with the instruction 'The Affiliate Disclosure displays on your Office Affiliates' branding blocks.' and a large empty text area for input.

Selecting and Managing your Affiliates

My Affiliates allows you to see the affiliates you are currently connected to, search and connect to new affiliates, request new Affiliates to be added to the system and more.



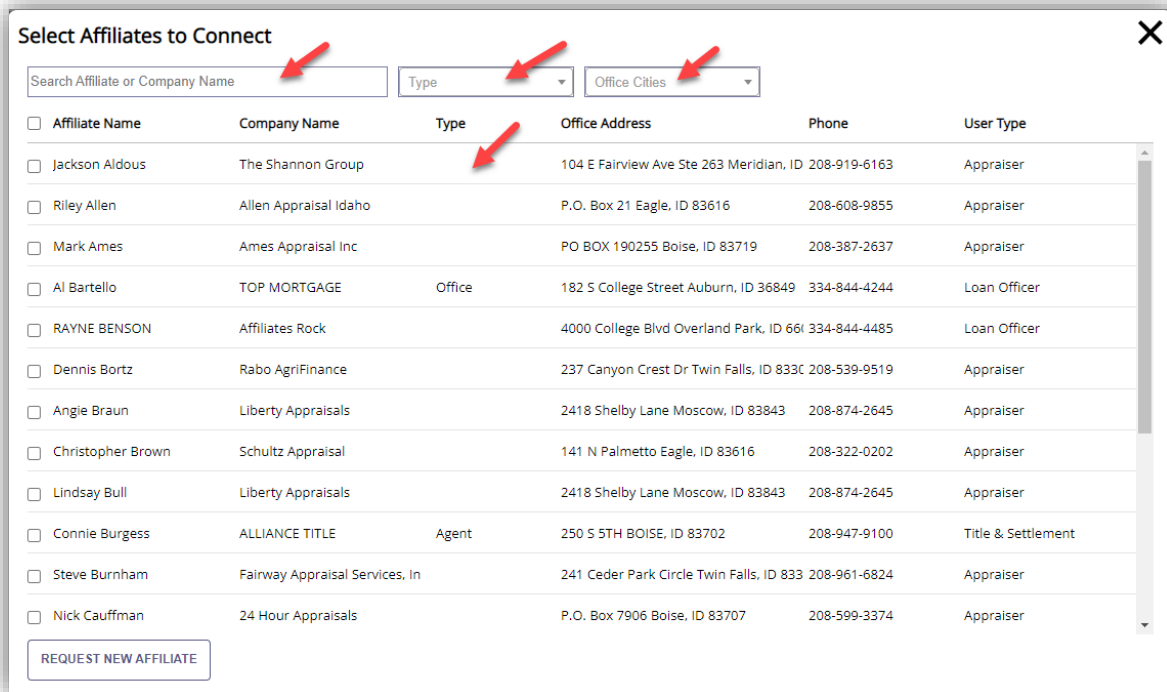
My Affiliates

Connect to an Affiliate

Search Affiliate or Company Name Type Office Cities

<input type="checkbox"/>	Affiliate Name	Company Name	Phone	Collaboration Center	Type	User Type	Messages
<input type="checkbox"/>	Bob Haskins	Fidelity Title	949-846-3211		Agent	Affiliate	3 new
<input type="checkbox"/>	Connie Burgess	ALLIANCE TITLE	208-947-9100		Agent	Title & Settlement	None
<input type="checkbox"/>	Al Bartello	TOP MORTGAGE	334-844-4244		Office	Loan Officer	2
<input type="checkbox"/>	James Smith	Smith Roofing			Office	Roofing Company	None

Connecting to affiliates is easy, you will click on the “Connect to an Affiliate” at the top of the page. Once you click on it another modal (window) will open to allow you to search and select new affiliates. You can search by name; you can search by type if you click on type, you will get a list of all the affiliate types in the system so if you only want to look for loan officers you can select Loan Officer, all the loan officers will display, or you can search by office city. The list will display all affiliates you are already connected to you will see either Office (for those connected via your office) or Agents those connected by you. If the type is blank, it is available for you to connect to.



Select Affiliates to Connect

Search Affiliate or Company Name Type Office Cities

<input type="checkbox"/>	Affiliate Name	Company Name	Type	Office Address	Phone	User Type
<input type="checkbox"/>	Jackson Aldous	The Shannon Group		104 E Fairview Ave Ste 263 Meridian, ID	208-919-6163	Appraiser
<input type="checkbox"/>	Riley Allen	Allen Appraisal Idaho		P.O. Box 21 Eagle, ID 83616	208-608-9855	Appraiser
<input type="checkbox"/>	Mark Ames	Ames Appraisal Inc		PO BOX 190255 Boise, ID 83719	208-387-2637	Appraiser
<input type="checkbox"/>	Al Bartello	TOP MORTGAGE	Office	182 S College Street Auburn, ID 36849	334-844-4244	Loan Officer
<input type="checkbox"/>	RAYNE BENSON	Affiliates Rock		4000 College Blvd Overland Park, ID 661	334-844-4485	Loan Officer
<input type="checkbox"/>	Dennis Bortz	Rabo AgriFinance		237 Canyon Crest Dr Twin Falls, ID 833C	208-539-9519	Appraiser
<input type="checkbox"/>	Angie Braun	Liberty Appraisals		2418 Shelby Lane Moscow, ID 83843	208-874-2645	Appraiser
<input type="checkbox"/>	Christopher Brown	Schultz Appraisal		141 N Palmetto Eagle, ID 83616	208-322-0202	Appraiser
<input type="checkbox"/>	Lindsay Bull	Liberty Appraisals		2418 Shelby Lane Moscow, ID 83843	208-874-2645	Appraiser
<input type="checkbox"/>	Connie Burgess	ALLIANCE TITLE	Agent	250 S 5TH BOISE, ID 83702	208-947-9100	Title & Settlement
<input type="checkbox"/>	Steve Burnham	Fairway Appraisal Services, In		241 Ceder Park Circle Twin Falls, ID 833	208-961-6824	Appraiser
<input type="checkbox"/>	Nick Cauffman	24 Hour Appraisals		P.O. Box 7906 Boise, ID 83707	208-599-3374	Appraiser

REQUEST NEW AFFILIATE

Paragon Affiliate Connect

You can connect to one or more affiliates at the same time. Simply click the box(es) to the left of the name once you select them at the bottom you will see the option to Connect to my Affiliates or as a broker you will also have the option to Connect to Office. Connecting to office will allow you to connect that affiliate(s) to everyone in your office.

Select Affiliates to Connect

Type

Office Cities

<input type="checkbox"/>	Affiliate Name	Company Name	Type	Office Address	Phone	User Type
<input checked="" type="checkbox"/>	Jackson Aldous	The Shannon Group		104 E Fairview Ave Ste 263 Meridian, ID	208-919-6163	Appraiser
<input checked="" type="checkbox"/>	Riley Allen	Allen Appraisal Idaho		P.O. Box 21 Eagle, ID 83616	208-608-9855	Appraiser
<input type="checkbox"/>	Mark Ames	Ames Appraisal Inc		PO BOX 190255 Boise, ID 83719	208-387-2637	Appraiser
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<input type="checkbox"/>	Christopher Brown	Schultz Appraisal		141 N Palmetto Eagle, ID 83616	208-322-0202	Appraiser
<input type="checkbox"/>	Lindsay Bull	Liberty Appraisals		ow, ID 83843		ser
<input type="checkbox"/>	Connie Burgess	ALLIANCE TITLE	Agent	702		Settlement
<input type="checkbox"/>	Steve Burnham	Fairway Appraisal Services, In		win Falls, ID 833		ser
<input type="checkbox"/>	Nick Cauffman	24 Hour Appraisals		P.O. Box 7906 Boise, ID 83707	208-599-3374	Appraiser

REQUEST NEW AFFILIATE

CONNECT TO OFFICE

CONNECT TO MY AFFILIATES

If you are a broker/broker manager you will see this option

If you are an agent or a broker you will see this option

If you cannot find the Affiliate and you would like to request to the Board/Association/MLS that you want them to be added you can click on "Request New Affiliate" fill out the form and submit.

Select Affiliates to Con

Request New Affiliate

Submit the information below and the MLS board will contact the affiliate.

You will be notified when the new affiliate has been added.

Affiliate Name

Phone

Company Name

Email

Select Affiliate Type

CANCEL

SUBMIT REQUEST

☐

Jackson Aldous

☐

Riley Allen

☐

Mark Ames

☐

Al Bartello

☐

RAYNE BENSON

☐

Dennis Bortz

☐

Angie Braun

☐

Christopher Brown

☐

Lindsay Bull

☐

Connie Burgess

☐

Steve Burnham

☐

Nick Cauffman

Schultz Appraisal

Liberty Appraisals

ALLIANCE TITLE

Fairway Appraisal Services, In

24 Hour Appraisals

Agent

141 N Palmetto Eagle, ID 83616

2418 Shelby Lane Moscow, ID 83843

250 S 5TH BOISE, ID 83702

241 Ceder Park Circle Twin Falls, ID 833

P.O. Box 7906 Boise, ID 83707

208-322-0202

208-874-2645

208-947-9100

208-961-6824

208-599-3374

Appraiser

Appraiser

Appraiser

Loan Officer

Loan Officer

Appraiser

Appraiser

Appraiser

Title & Settlement

Appraiser

REQUEST NEW AFFILIATE

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3/21/2022

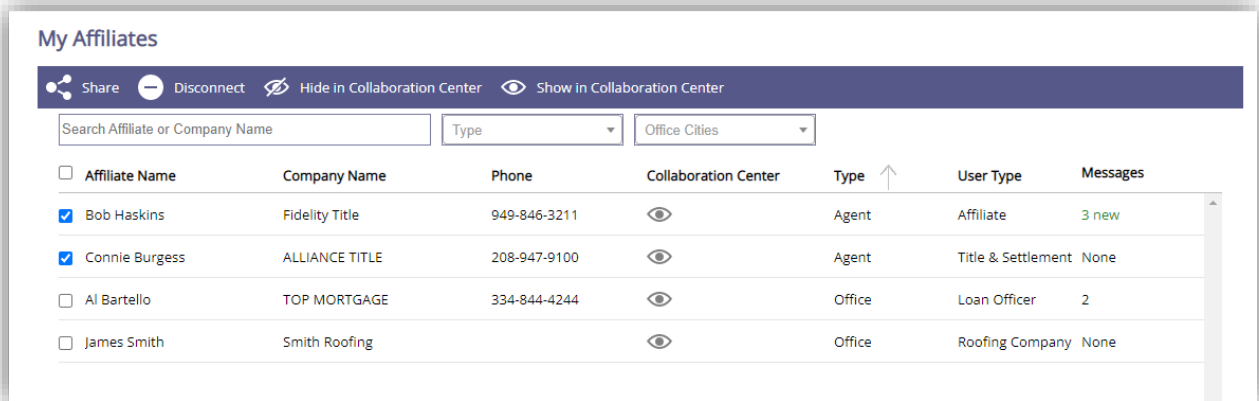
BK MLS Solutions

Internal and Client Use Only

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Paragon Affiliate Connect

Once you select one or more of your affiliates that you are connected to you can also choose to share, disconnect, and choose to hide them from your client's collaboration center. **You control what you want to do.**



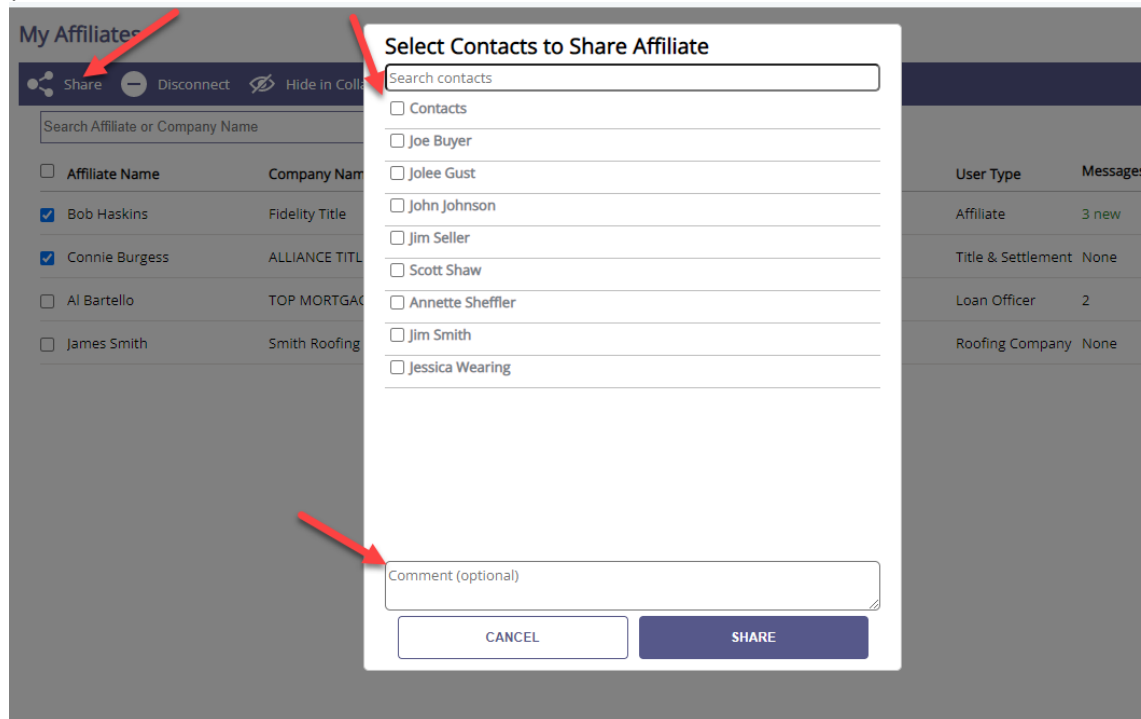
My Affiliates

Share Disconnect Hide in Collaboration Center Show in Collaboration Center

Search Affiliate or Company Name Type Office Cities

<input type="checkbox"/> Affiliate Name	Company Name	Phone	Collaboration Center	Type ↑	User Type	Messages
<input checked="" type="checkbox"/> Bob Haskins	Fidelity Title	949-846-3211		Agent	Affiliate	3 new
<input checked="" type="checkbox"/> Connie Burgess	ALLIANCE TITLE	208-947-9100		Agent	Title & Settlement	None
<input type="checkbox"/> Al Bartello	TOP MORTGAGE	334-844-4244		Office	Loan Officer	2
<input type="checkbox"/> James Smith	Smith Roofing			Office	Roofing Company	None

If you choose to share your affiliate(s) a modal (window) will open, you can choose one or many of your contacts to share that information with. You can also add a comment and then click share. The contact will get an email that gives them the affiliates information and the affiliate will get a notification that you shared their information with the contacts name.



My Affiliates

Share Disconnect Hide in Collaboration Center

Search Affiliate or Company Name

Select Contacts to Share Affiliate

Search contacts

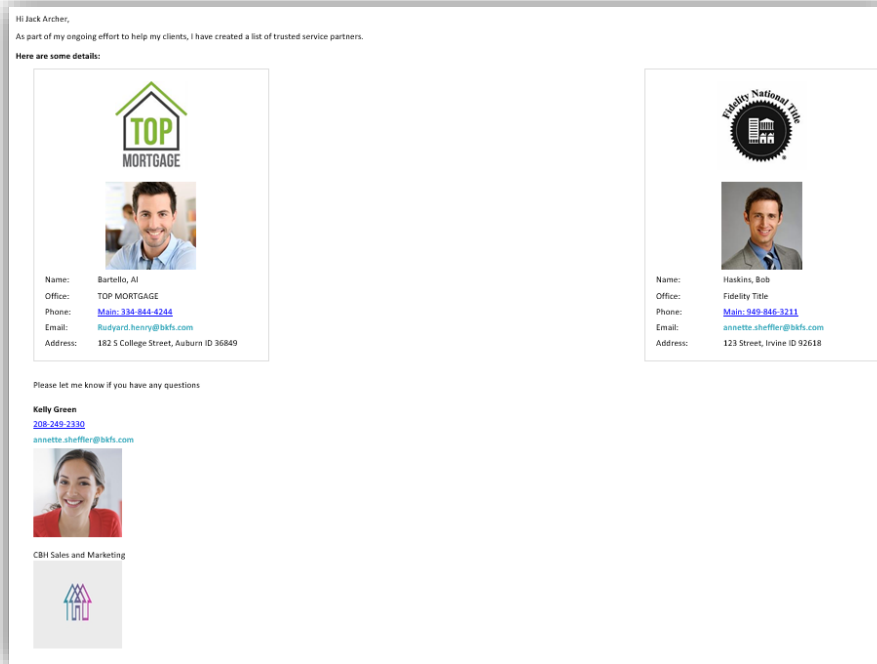
- ☐ Contacts
- ☐ Joe Buyer
- ☐ Jolee Gust
- ☐ John Johnson
- ☐ Jim Seller
- ☐ Scott Shaw
- ☐ Annette Sheffler
- ☐ Jim Smith
- ☐ Jessica Wearing

Comment (optional)

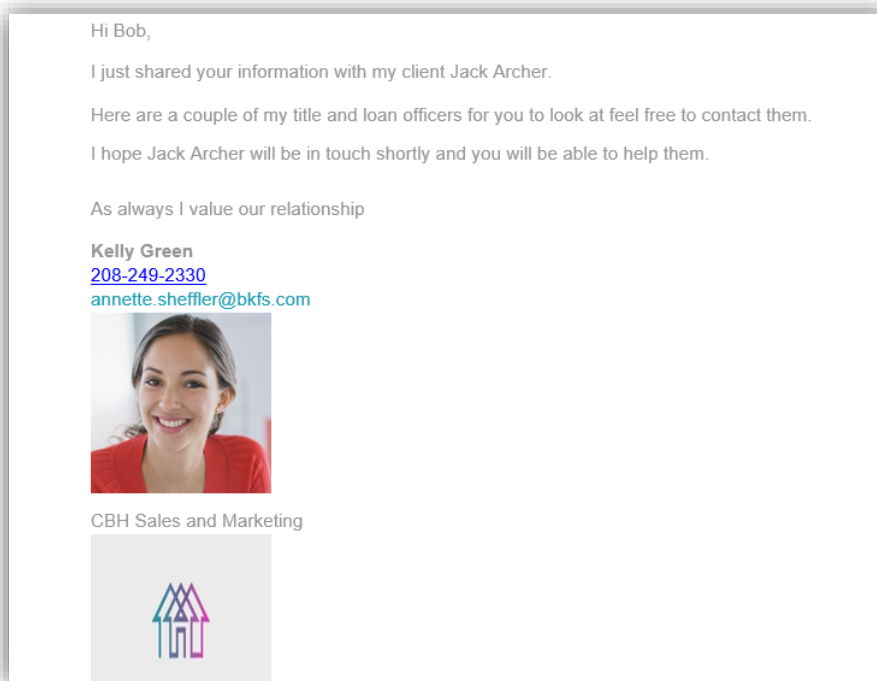
CANCEL SHARE

Paragon Affiliate Connect

The contact will receive an email message with the affiliates you shared with them and your message.



The affiliate will also receive a message from you stating that you shared their information with your client.



Paragon Affiliate Connect

Communicate with your affiliate right from here, simply click on either the unread messages or the None to start the communication directly with that affiliate. The messages are NOT seen by consumers, this is a message back and forth with your selected affiliate.

My Affiliates

Connect to an Affiliate

Type

Office Cities

<input type="checkbox"/> Affiliate Name	Company Name	Phone	Collaboration Center	Type ↑	User Type	Messages
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<input type="checkbox"/> James Smith	Smith Roofing			Office	Roofing Company	None

Bob Haskins

Share
 Disconnect
 Hide in Collaboration Center

Bob Haskins
 Fidelity Title
 Main: 949-846-3211
annette.sheffler@bkfs.com
 123 Street
 ID 83701

Kelly are they ready to buy

May 27, 4:04 PM (270 days ago)

I shared your information with my Buyer, Joe Buyer, with the message: .

Dec 16, 10:10 AM (68 days ago)

I shared your information with my Buyer, Jolee Gust, with the message: .

Dec 16, 10:10 AM (68 days ago)

Thanks

Dec 16, 10:10 AM (68 days ago)

I shared your information with my Buyer, Joe Buyer, with the message: .

Jan 19, 12:12 PM (33 days ago)

Thank you

Feb 15, 2:02 PM (6 days ago)