Paragon 5 Admin – Adding and Maintaining Teams

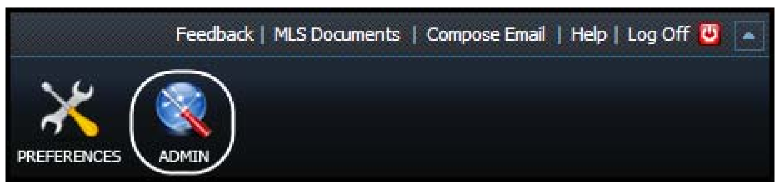
Note: The Admin Main page has movable widgets. Your widget locations may be different.

Paragon 5 supports Team functionality at its basic. Meaning a team can be set up to input and maintain team listings. Future functionality is to allow more team cross functionality with other aspects of Contacts, CMA's, Marketing, etc. This Quick Start Guide outlines how to setup teams in Paragon. MLS Admin staff levels 7 and 8 will have access to Team Maintenance without having to activate teams for the MLS membership. Once the teams and their common team listings have been set up, contact your SSM to activate the Team Controls in Listing Maintenance and Firm Inventory. This is the final "switch" to activate the team capability for team members.

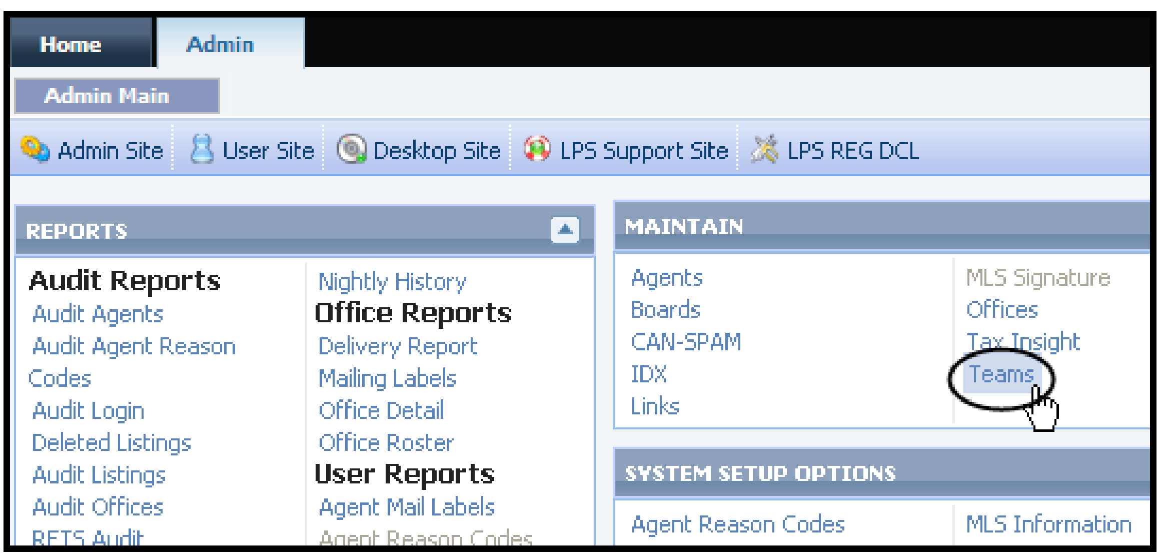
Note: Listings will continue to have Listing and Selling Agents of record. The Team's information can replace the agent's information on listing views and reports. Listing and selling activities are aggregated to the team in Paragon's Statistical Reporting.

Team members only need to have a level 4 security setting to input and maintain team listings.

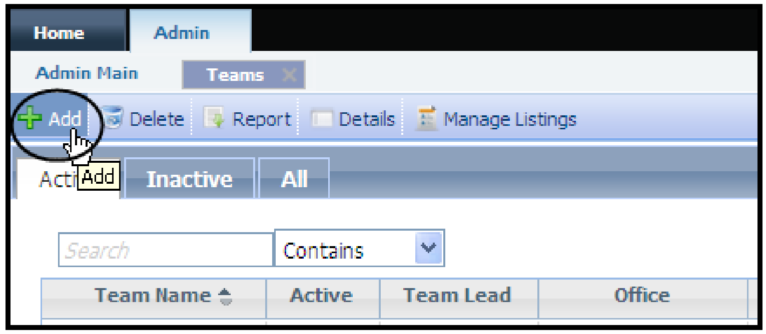
To add a new team to Paragon, click the **Admin** button on the top right side of the main menu. Only MLS Admin level security members will see this button.



On the Admin Main page and in the Maintain widget, click **Teams**.



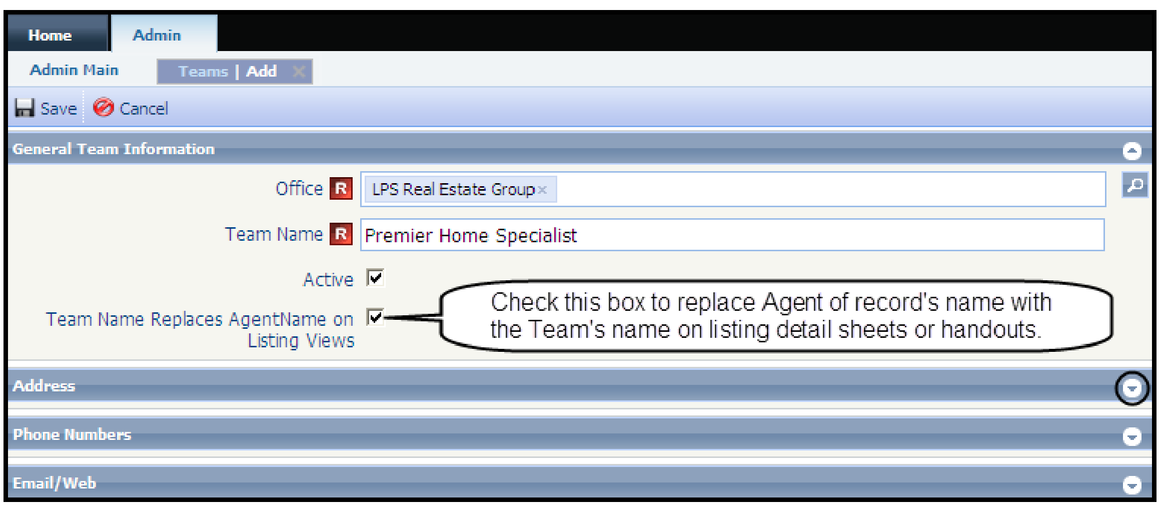
Paragon displays a list of existing teams. Click **+Add**.



Paragon displays a new Team template with four (4) containers into which you add team preferences and information. The containers are General, Address, Phone Numbers and Email/Web.

General Team Information

- **Office:** enter the office in which the team is working.
  Note: Agents can be from different offices within the same brokerage. Agents **cannot** be from different brokerages.
- **Team Name:** enter the team name. This can be used to brand the team's activities. Usually, one member creates the team and they will be the "owner" or team leader.
- **Active:** checking the box activates the team.
- **Team Name Replaces Agent Name on Listing Views:** checking this box instructs Paragon to replace the agent name with the team name.

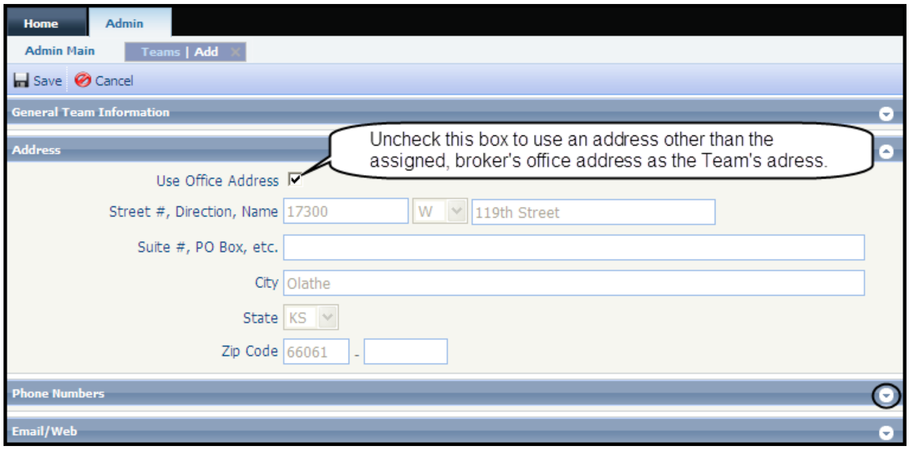


After entering the General Team Information, click the **Open** button for the Address container.

Note: after entering information into Office and Team Name fields, you can start saving this record.

Team Address: There are two (2) options for the Team's address.

1. If the **Use Office Address** checkbox is checked, then the assigned, Broker's Office address will be the Teams Address. With this box checked, the assigned office's address is automatically populated into the address fields.
2. If the **Use Office Address** checkbox is unchecked, then the address fields become editable and you can enter a different address for the Team's Address.

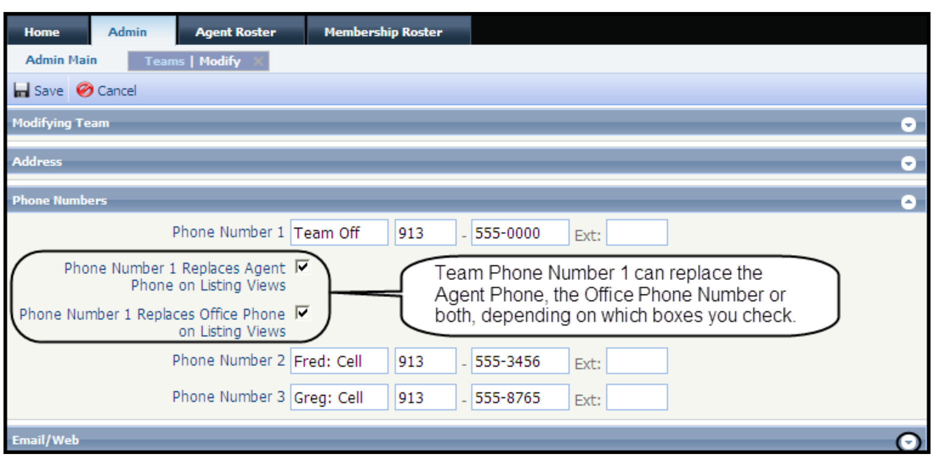


After entering the Address Information, click the **Open** button for the Phone Numbers container.

Team Phone Numbers: There are three (3) phone numbers fields for the team. There are also two (2) checkboxes used to direct how Phone Number 1 will be used on listing detail sheets and handouts. The phone number labels can be up to ten (10) characters in length.

1. Phone Number 1 replaces the agent of record's phone number
2. Phone Number 1 replaces the office phone number

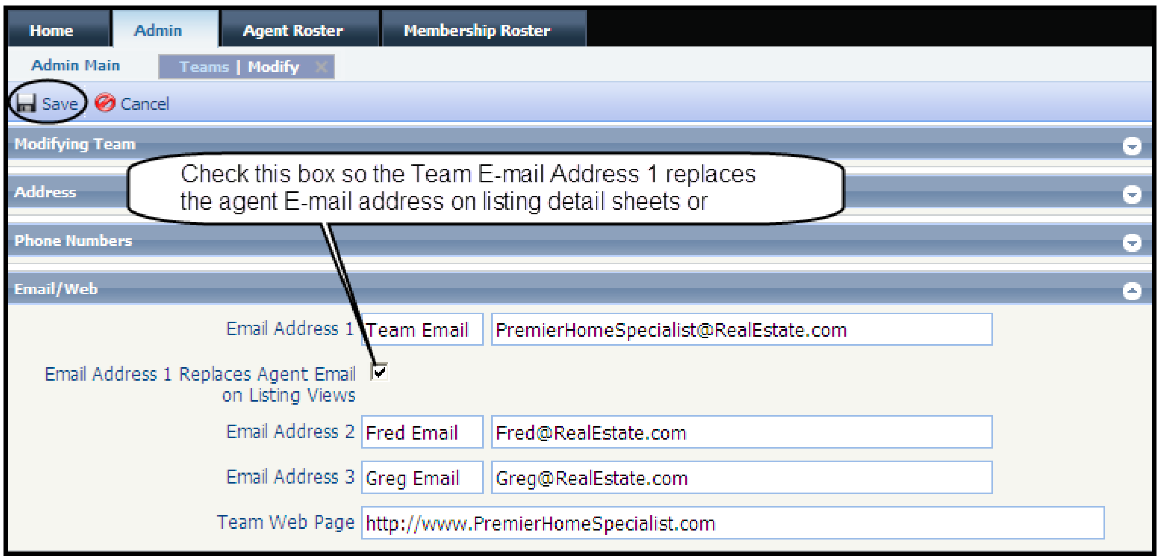
Note: Because they are checkboxes, Phone Number 1 could replace both the agent phone number and the office phone number on listing detail sheets and handouts.



After entering the Phone Numbers information, click the **Open** button for the Email/Web container.

Team E-mail Addresses: you can enter up to three (3) E-mail addresses for the Team. When you check the *Email Address 1 Replaces Agent Email on Listing Views* checkbox, Email Address 1 will replace the agent's Email address on listing detail sheets and handouts. The E-mail Address labels can be up to ten (10) characters in length.

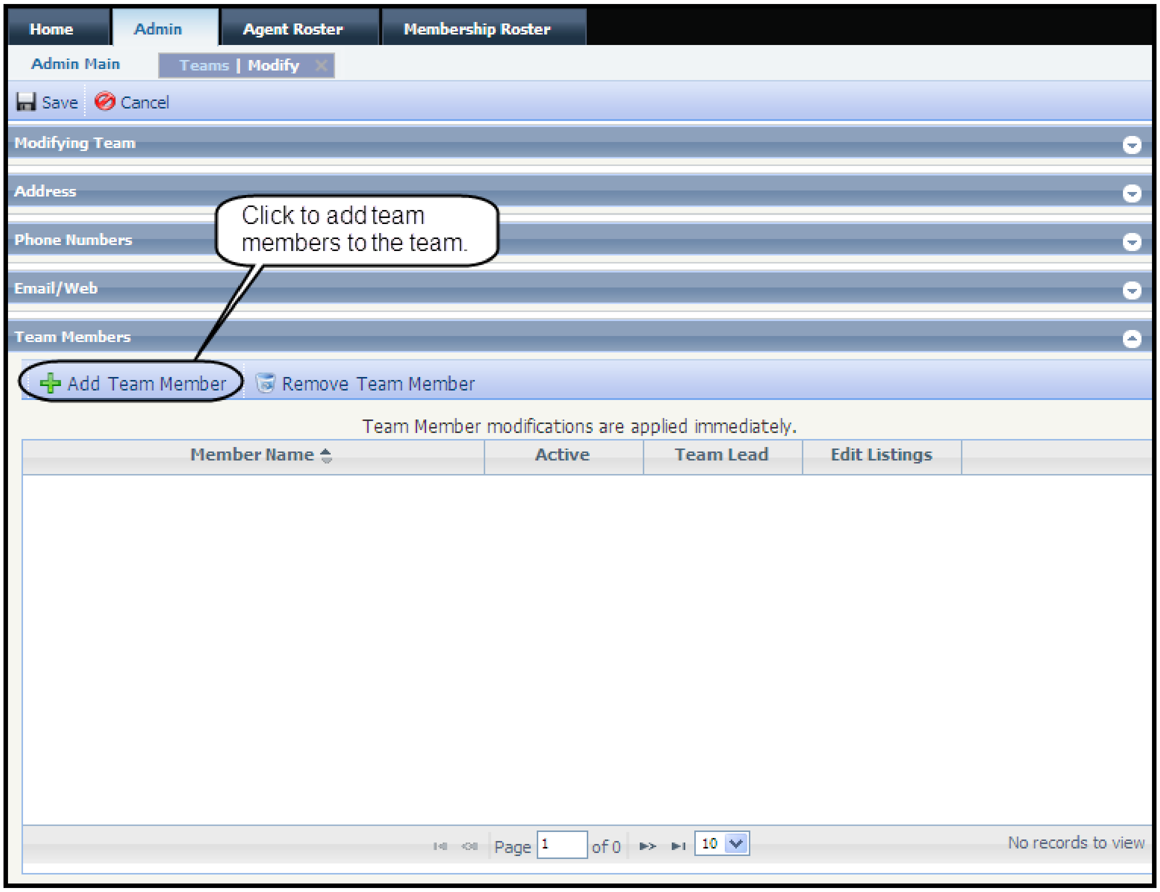
Team Web Page: the Team Web Page address **does not** replace an agent's web address on listing details sheets or handouts. When a Paragon user clicks on the team name inside Paragon, the team's web page address is displayed on the contact record. That is the only place where the team web page address is displayed.



After entering the Team's E-mail addresses and Web Page address, click **Save** in the upper left hand corner of the Team input form to save your work.

After saving the team record, Team Members information container is then visible. Click the **Open** button to associate team members with this team.

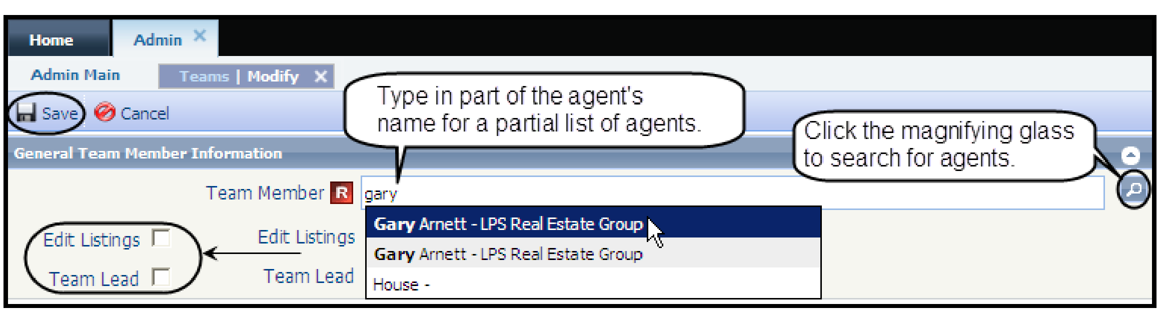
Click **Add Team Member**.



Use In-line Auto Complete to search for team members. With your cursor in the Team Member field:

- Type in part of the agent's name for a partial list of Agents
- Double click in the field for a partial list of Agents
- Click the magnifying glass to access the search tool

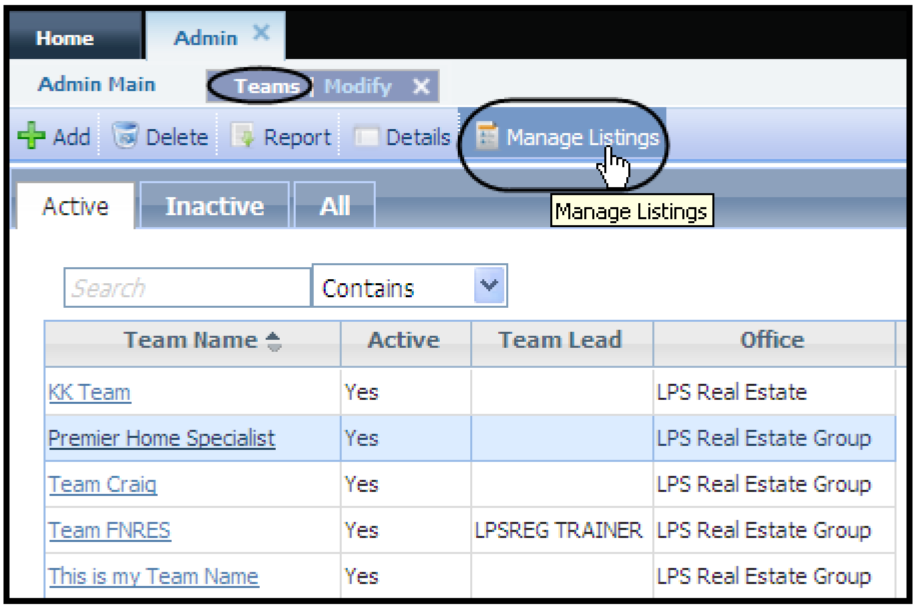
When you have located the correct agent, highlight the name and hit the **Enter** key.



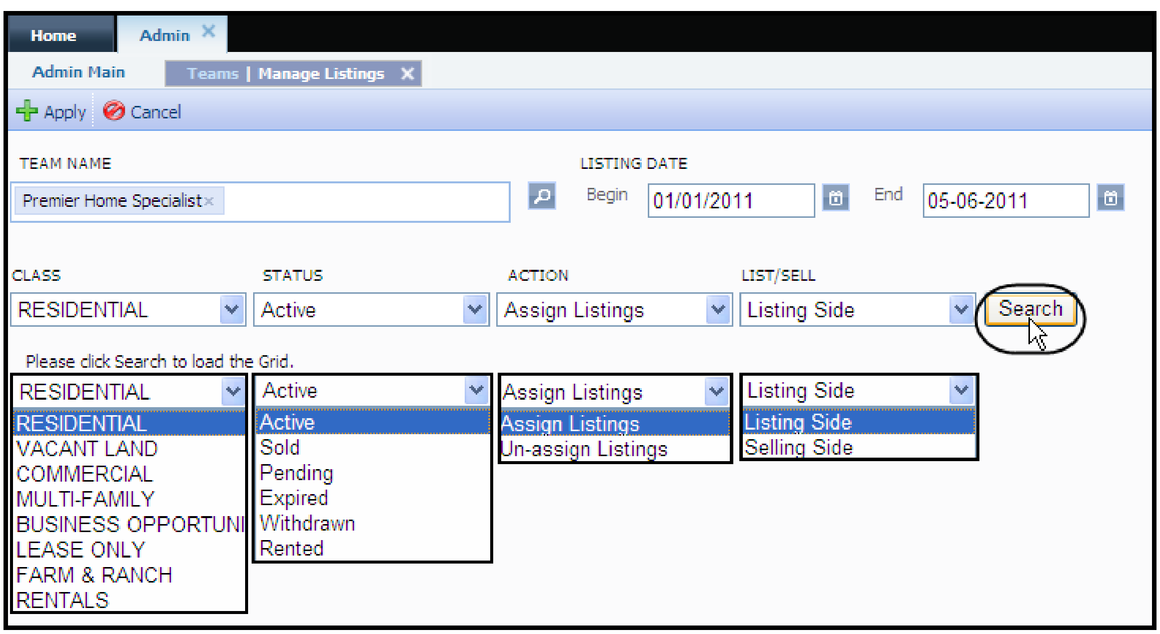
Note: Designate the role of each team member: Edit Listings and Team Lead. Checking the box authorizes that role.

After you have added the Team Members, click **Save**. (See screenshot above – top left corner)

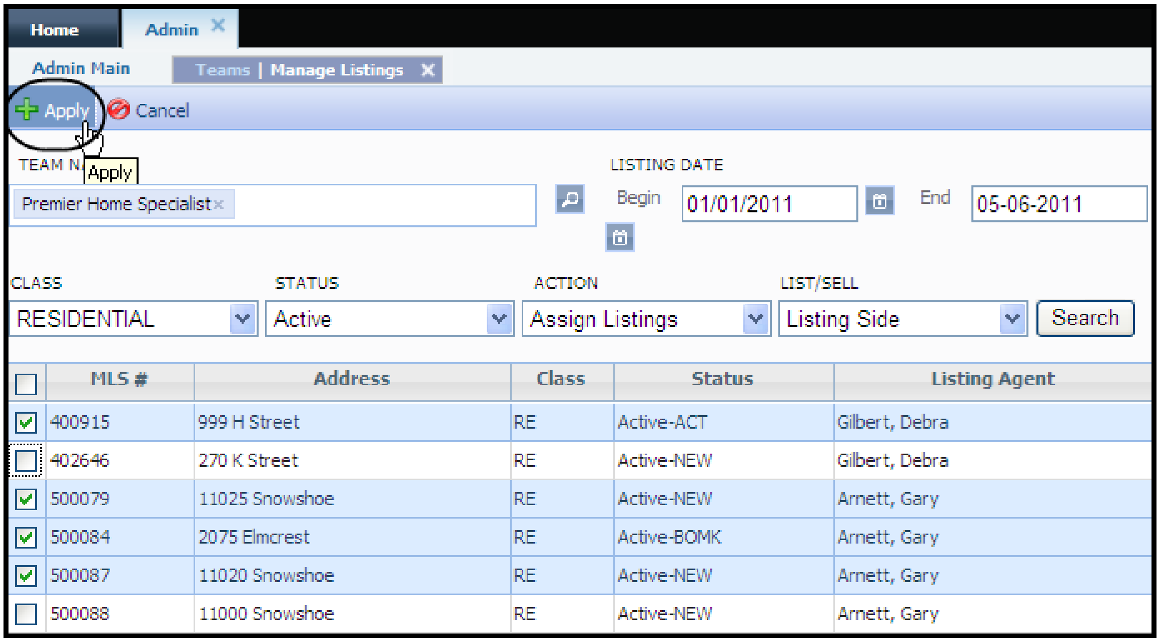
With the Team Members associated to the team, click the **Teams** part of the **Teams | Modify** button to return to the list of teams. To add listings to a Team, select the team then click **Manage Listings**.



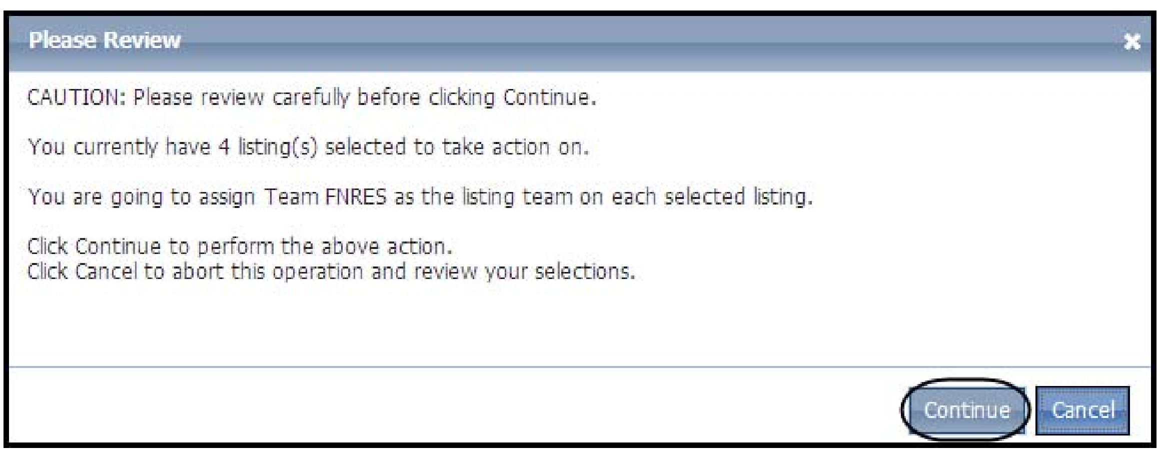
Using the search tools on the new page, enter a date range (**must** have an end date) and other criteria to locate the specific listings that are being added to the team and click **Search** located on the right side of the search tool.



Search results are displayed below the criteria. Select the listings to be added to the team by checking the box to the left of each listing. Click **Apply** to add the listings to the team.



A modal appears with "Please Review" in the banner. Double-check your selections. If all is correct, click **Continue**. If there is an error or you are not sure, click **Cancel** and change your selections.



When you click **Continue**, the selected listings are removed from the screen leaving the unselected listings visible.

Note: At the bottom of page 6 in the search for listings screenshot, one of the options in the Action box is **Un-assign Listings**. You can remove listings from a team using this function.

Ideas and Suggestions regarding Teams

- **If you are setting up teams for the very first time,** there is one (1) more required step in team setup.

  Please call your SSM. Your SSM needs to make some System Configuration changes to activate Teams in your Paragon 5 system.

- In the future, other options will be available to you regarding team setup, roles and privileges that can be assigned to team members. Your MLS will be notified, as these new capabilities are available.

<u>Suggestion for the MLS on assigning Listings to the Team:</u>

Once Teams have been set up, members added, and your SSM has turned on the team fields to make them available to team members in listing Input and Maintenance, let the team members do the work of assigning listings to the team

Instead of them bringing you the MLS numbers of the listings that will be added to the team and you assigning them, have the team members (or their office admin that does input/maintenance for the brokerage) do maintenance on the specific listings to add them to the team. More than likely, the new team members will have some existing active listings that will become part of the new team.

Under Contract, Sold, Expired, Withdrawn, etc., listings will probably not become part of the Team's inventory. They will remain with the member who is associated to that listing for historical purposes.