Paragon 5.92 Release Enhancements

**Updated on: 11/10/2022 (Page 13)**

[Corrected Paragon Issues 2](#_Toc117257569)

[MLS Customizations and Administration 3](#_Toc117257570)

[**Admin – Restrict Level 7 user access to Level 8 member records** 3](#_Toc117257571)

[**Admin – Member of Board defaults to All Boards for Level 8 users** 4](#_Toc117257572)

[Agent Level Changes 5](#_Toc117257573)

[**Updated help text on Expiring Notifications modal** 5](#_Toc117257574)

[**Password Change Screen now reflects maximum allowed characters** 6](#_Toc117257575)

[Collaboration Center 7](#_Toc117257576)

[No Changes for Collaboration Center 7](#_Toc117257577)

[Paragon Connect 8](#_Toc117257578)

[Contact List Updates 8](#_Toc117257579)

[Hotsheet Alert Save 9](#_Toc117257580)

[Rich Text Editor 9](#_Toc117257581)

[Purge Date 10](#_Toc117257582)

[Co-Agent 10](#_Toc117257583)

[Lookup Sort 11](#_Toc117257584)

[Tour - LIM 12](#_Toc117257585)

[Associated Documents Listing Input Maintenance 13](#_Toc117257586)

[CRS Data Tax Autofill from Listing Maintenance 17](#_Toc117257587)

[Paragon Affiliate Connect 19](#_Toc117257588)

[Corrected Paragon Affiliate Connect Issues 19](#_Toc117257589)

# Corrected Paragon Issues

|  |  |  |  |
| --- | --- | --- | --- |
| **Ticket#** | **Module** | **Organization** | **Summary** |
| TK-3480 | Prospecting | RAE - REALTOR Assoc of Edmonton, SDMLS | Update help text on Expiring Notifications modal |
| DEV-7795 | Tax | NJMLS - New Jersey MLS (Bergen) | Realist Tax Report in Paragon: Object reference not set to an instance of an object. |
| TK-2677 | Login/SSO | SCWMLS - South Central Wisconsin (Madison) | Limit password create/change field to max characters |
| TK-10340 | WebAPI | NEREN - New England Real Estate Network | Not All Resources Are Displaying in the System Resource Window Cannot Access Mappings |
| DEV-6286 | LIM | BCRES - REB2 Residential | Listing Congrats - DisplayID does not show after using Copy/Clone |
| TK-8545 | Search | CCAR - Coastal Carolinas AOR | P40 CCAR - searching by Hotsheet date yields error loading grid |
| DEV-5906 | View/Reports | BCRES - REB2 Residential | Listing selection not carried through from Google Map view |
| DEV-5867 | Admin | IRMLS - Indiana Regional MLS | Expanded Admin Access: Agent Admin > disable Active checkbox |
| DEV-5866 | Admin | IRMLS - Indiana Regional MLS | Expanded Admin Access: Agent and Office admin > default level 8 users to All Boards |
| TK-3953 | General UI | MAXEBRDI - MAXEBRDI MLS | View Full Image button does not work if the browser window resolution is smaller |
| TK-2333 | WebAPI | NEREN - New England Real Estate Network | WebAPI Field Set Name on System Grid is Blank |

# MLS Customizations and Administration

**All options in this section are either configurable via MLS Administration controls or by your System Support Manager as noted.**

**Admin – Restrict Level 7 user access to Level 8 member records**

**Action Item: N/A**

Per customer request, security level 7 users viewing the member record for a level 8 user will be unable to change the Active checkbox, the Locked checkbox, or the Security Level dropdown. [Admin > Manage > Users]

Graphical user interface, application

Description automatically generated

**Admin – Member of Board defaults to All Boards for Level 8 users**

**Action Item:** Contact your SSM to change the default from N to Y

If multiple boards are set up on your site, the Member of Board dropdown on the Agent and Office grids will default to All Boards for level 8 users, if the config setting RESTRICT\_SL8\_TO\_OFFICE\_BOARDS=N. If RESTRICT\_SL8\_TO\_OFFICE\_BOARDS=Y, the dropdown will default to the user’s Office Member of Board.

Graphical user interface, application

Description automatically generated

**Agent Level Changes**

**The following section contains changes that are active system wide and available to users based on their assigned security levels.**

**Updated help text on Expiring Notifications modal**

On the Expiring Notifications modal, extending notifications follows your setting in Preferences > Email > Default Notification Recurrence > Expiration. The Expiring Notifications modal incorrectly stated that notifications would be renewed for 12 months. The text has been corrected to note that the renewal period will follow your preferences.

*Previous text:* Extend will renew the notifications for 1 year.

*Updated text:* Extend will renew the notifications for up to 1 year, based on your notification settings in Preferences.

Graphical user interface

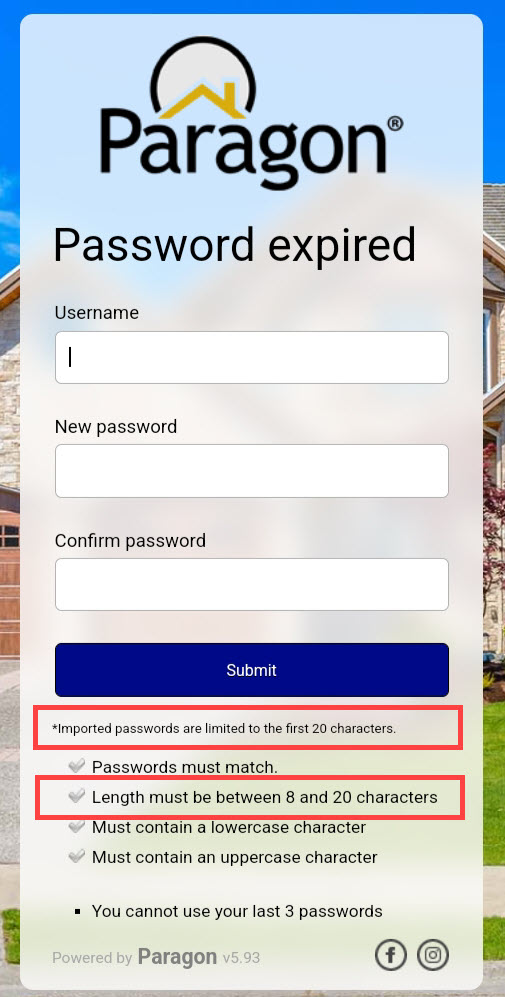
Description automatically generated

**Password Change Screen now reflects maximum allowed characters**

Paragon has a maximum limit of 20 characters for user passwords, but this was not conveyed on the Change Password screen. The password input text boxes will no longer allow more than 20 characters to be entered, and passwords copied and pasted into the field will truncate at 20 characters.

The password requirement text for minimum length was updated to reflect the minimum and maximum number of allowed characters: Length must be between [#] and 20 characters. [*Note: minimum number of characters is configured per MLS.*]

In addition, help text was added to address imported or copy/pasted passwords: Imported passwords are limited to the first 20 characters.



# Collaboration Center

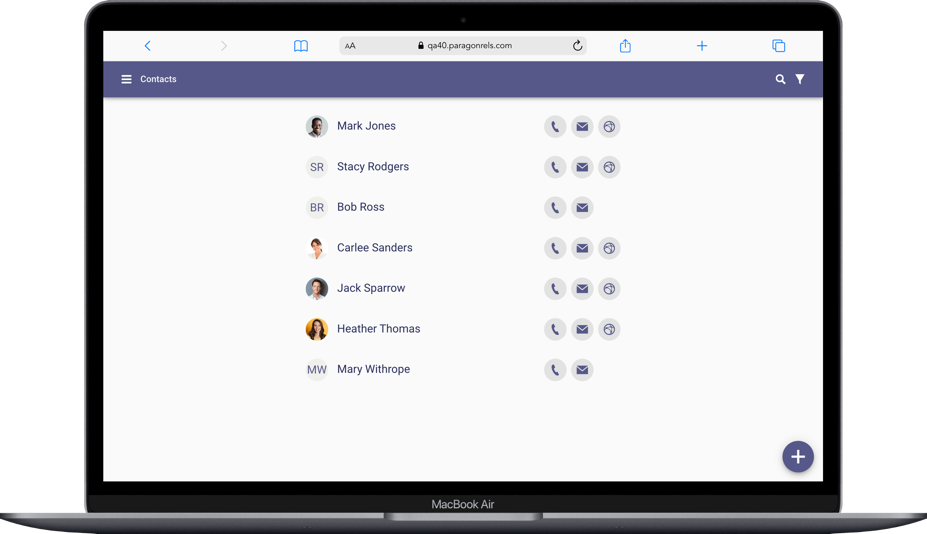
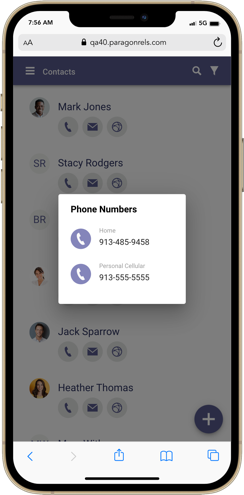
**All options in this section are either configurable via MLS Administration controls or by your System Support Manager as noted.**

## No Changes for Collaboration Center

# Paragon Connect

**All options in this section are either configurable via MLS Administration controls or by your System Support Manager as noted.**

## Contact List Updates

A picture containing text

Description automatically generatedThe contact list was updated to include three shortcut actions that help you quickly get access your client’s information. These three actions include the ability to view all phone numbers, email addresses, and a link to the client’s Collaboration Center site.

**Phone:**

Tapping on the phone icon will open a simple dialog and list all phone numbers associated with the contact. Depending on the device you are on you can tap on the phone number to instantly call the contact or you can click on an SMS icon to text your client.

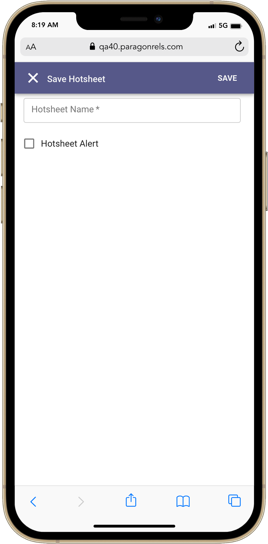
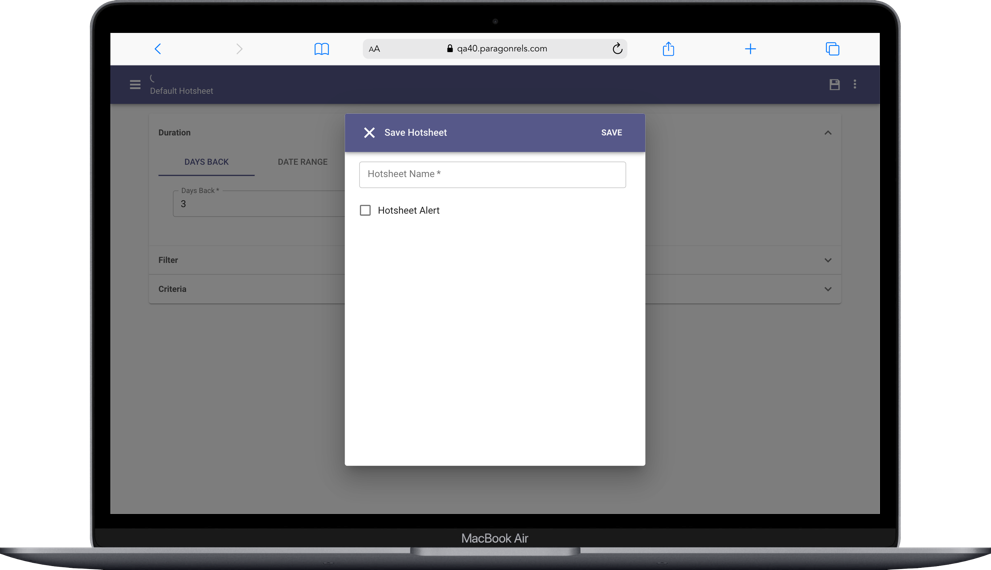
**Email:**

Clicking or tapping on the email icon will open a simple dialog with a list of all email addresses associated to the contact. You can select one or more email addresses to compose an email to your client.

**Collaboration Center:**

If your contact has a notification setup, you will find a web icon that when clicked/tapped will take you to your contact’s Collaboration Center site.

## Hotsheet Alert Save

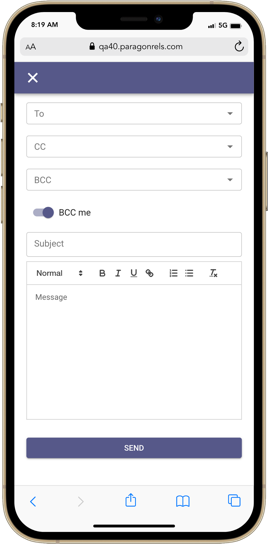
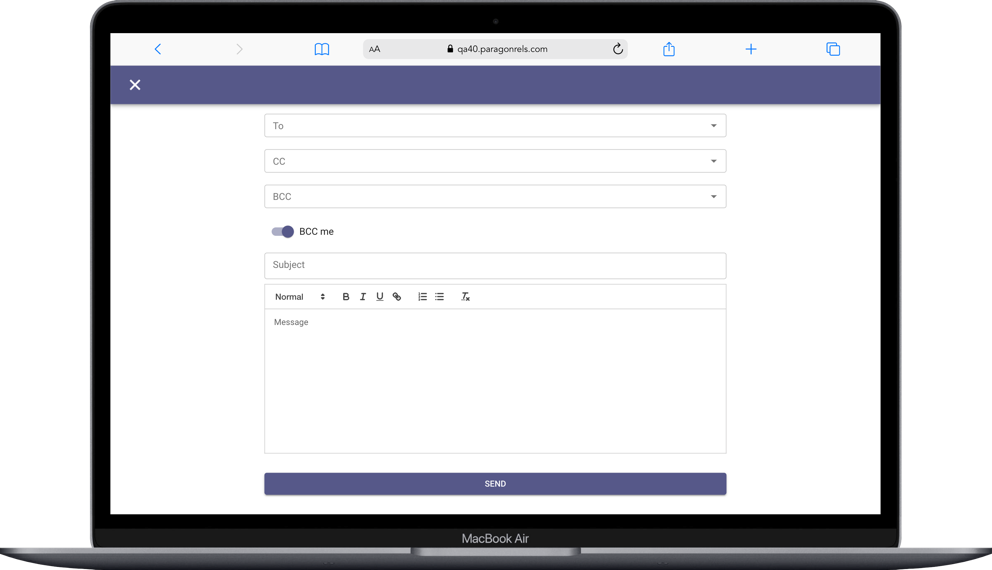


Prior to the 5.92 release, you would need to go to your saved Hotsheet searches to set a Hotsheet alert. Now you can set a Hotsheet alert while you save a new search. Note: Max number of alerts you can save is 5. Once you meet this threshold, the option to save a new alert from the save process will be disabled.

## Rich Text Editor

A picture containing text

Description automatically generatedThe compose email message body has been upgraded to include a rich text editor. This will allow you to now apply some formatting options to the emails that you compose. This is available on all devices small and large. Below is a list of formatting options you will find.



* Font type
* Bold
* Italics
* Underline
* Add a link
* Unordered bullets
* Numbered bullets
* Stroke

## Purge Date

A picture containing text

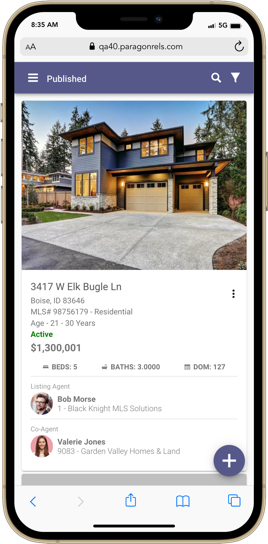
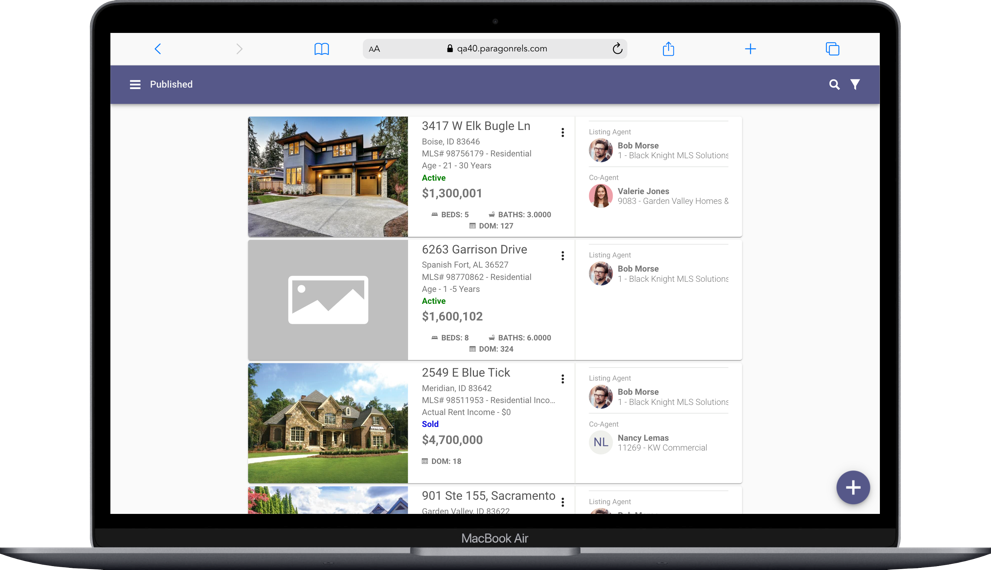
Description automatically generatedGraphical user interface, application

Description automatically generatedThe ability to add a new listing is just around the corner. There are still a few features we are working on before we enable this feature for everyone. In the meantime, here is an update to the “Unpublished” section. The listings results have now been updated to include a “Purge Date.” This purge date will let you know when this unpublished (partial) listing will be removed from the system if not converted to a published (live) listing.

## Co-Agent

A picture containing text

Description automatically generatedWhile viewing a list of your published or unpublished listings, you will now see the Co-Agent added to any listing that contains a secondary agent on the listing.



You can also click or tap on the agent or co-agent to view additional agent and office information.

## Lookup Sort

The lookup sort order has been updated to honor the configurable sort order established by the Paragon Pro system.

Graphical user interface, application

Description automatically generated

A picture containing text

Description automatically generated

## Tour - LIM

The ability to add, edit, and delete tours has been added to the 5.92 release. This will sync with your Paragon Pro system and will alow you to see any tours created in either system.

***Note:*** *If your system utilizes “Tour Groups” the ability to add/edit tours has been disabled. Additional enhancements are needed to support this feature and will be added to the system in the near future.*

**Add:**

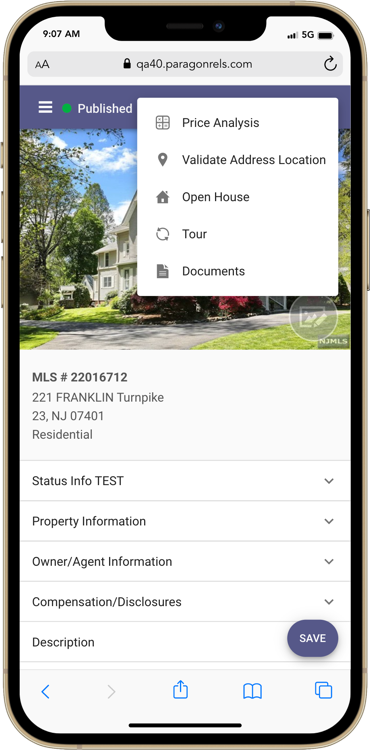
To add a new tour, you first must go to a listing that you can edit. Once you have accessed the listing edit form, the overflow icon (three dots) will contain a new option called “Tours.” This will house all of your tours for that listing. To add a new tour, you will click on the purple + icon in lower right hand corner. This will launch the add tour modal. You fill out the form as instructed, click save, and just like that a new tour has been created.

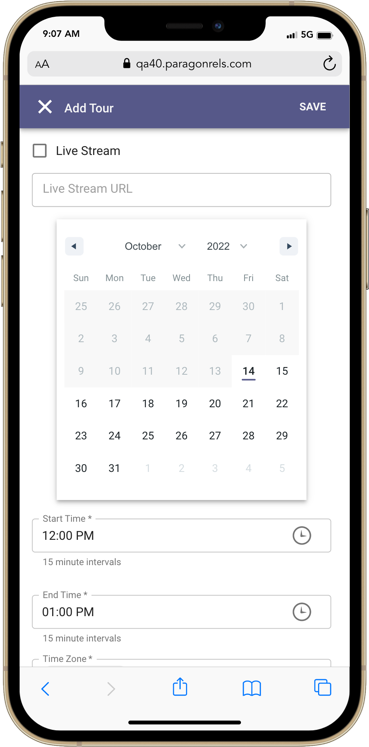
**Edit:**

You can click/tap on the card to edit the tour. You can also click/tap on the three dot overflow icon on the card to see an edit option.

**Delete/+ Calendar:**

There are two links on the card. The +Calendar link will add the event to your native calendar that you are using. The delete option will allow you to delete the tour from the listing.

Graphical user interface, application

Description automatically generated****Graphical user interface, application

Description automatically generated

Delete Tour

Add New Tour

Tour Menu

Tour Cards

## Associated Documents Listing Input Maintenance

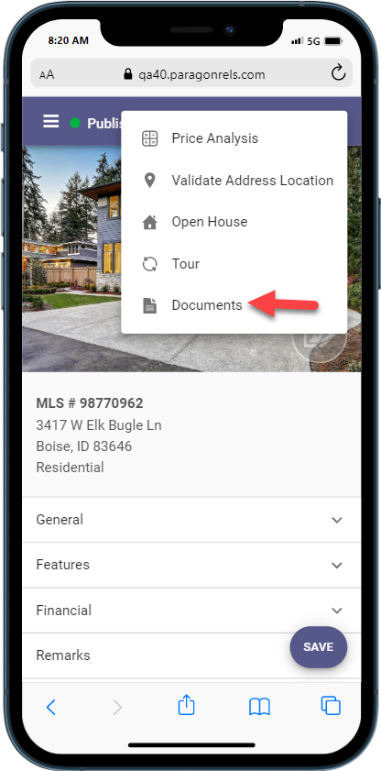
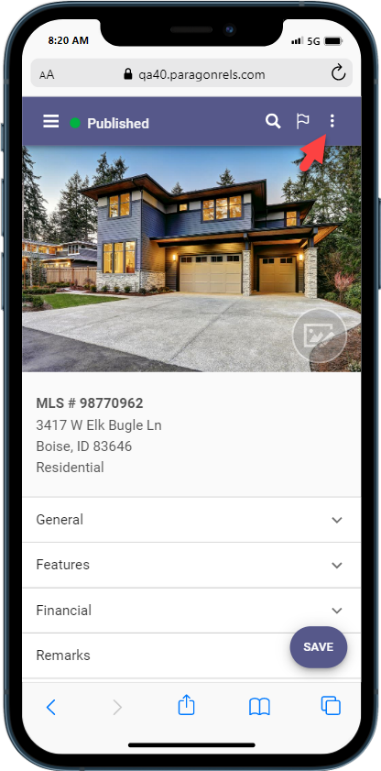
If enabled in Paragon Professional, you will now have access in Paragon Connect to upload or manage documents for your listings. The Associated Documents feature can be accessed by navigating to the listing edit screen in the Listing Input Maintenance module. Paragon Connect Associated Documents follow the exact same logic as Paragon Pro for document size, number of documents, document type, etc. The key features contained in this release are the following:

* Add documents
* Manage documents
  + Edit
  + Delete
* View documents

***Note:*** *The Associated Documents were released to production between the 5.91 and 5.92 releases.*

**Access Associated Documents**

The Associated Documents can be accessed by navigating to the edit listing screen in the Listing Input Maintenance module, clicking on the overflow menu, and clicking on the Documents link.



**Adding a Document**

Clicking on the + button will display the Add Document upload page. The following options will be available on the upload page:

* Choose File – Clicking CHOOSE FILE will opens the native file selection option for your device.
* Description – Enter a brief description of the document.
* Document Type – This field will only display if enabled by your administrator. It will display as a drop-down menu.
* Share with Public – Checking this option will make the document publicly display in Collaboration Center and available to be shared via email.
* Click the UPLOAD link to upload the document.

Graphical user interface, application

Description automatically generatedGraphical user interface, text, application

Description automatically generated

**Manage Documents**

Clicking on the document card opens the document.

Graphical user interface, application

Description automatically generated

Clicking on DELETE will delete the document.

Graphical user interface, application

Description automatically generated

Clicking on EDIT allows you to edit the description, document type, and the share option. The document type field will only display if enabled by your administrator. Clicking the SAVE link will save your changes.

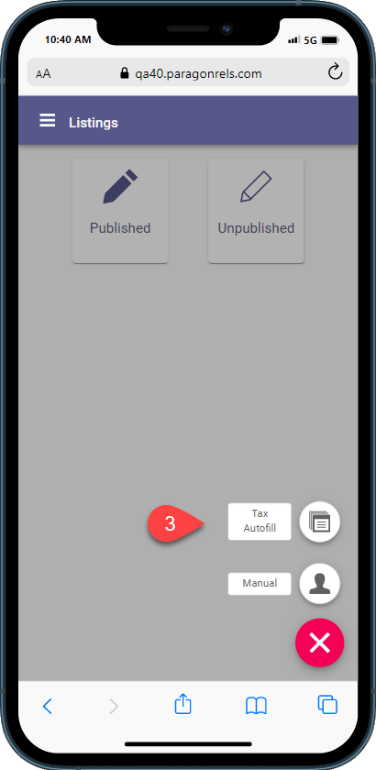
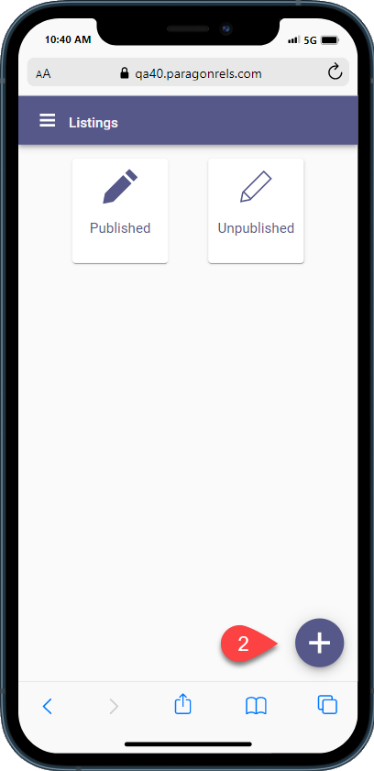
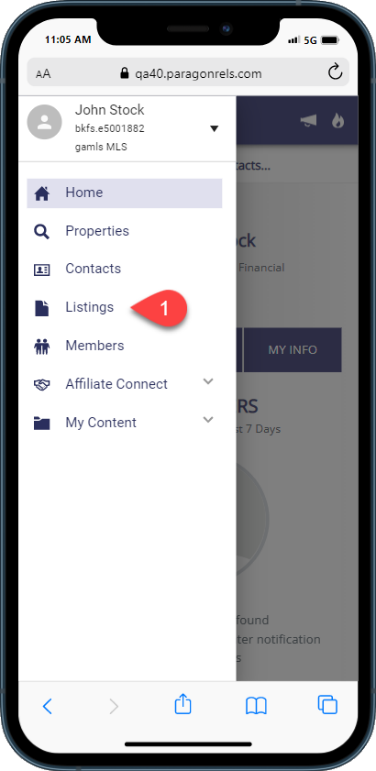
Graphical user interface, application

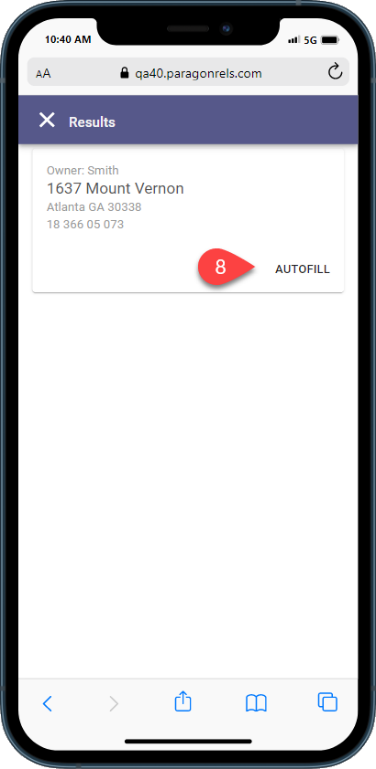
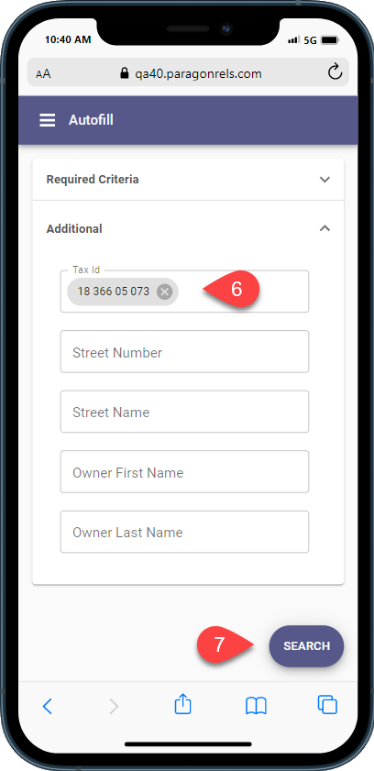
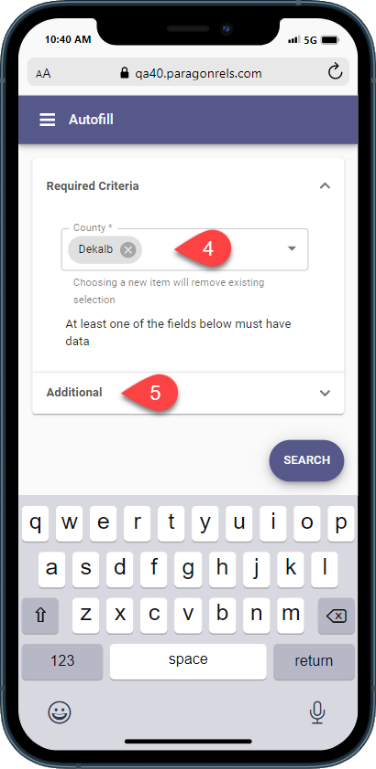
Description automatically generated Graphical user interface, text, application

Description automatically generated

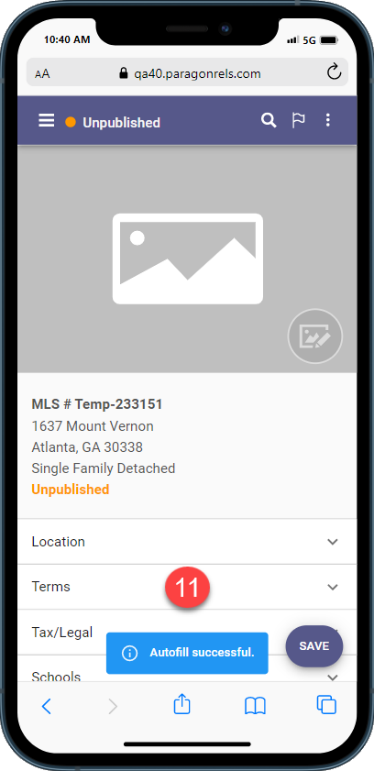
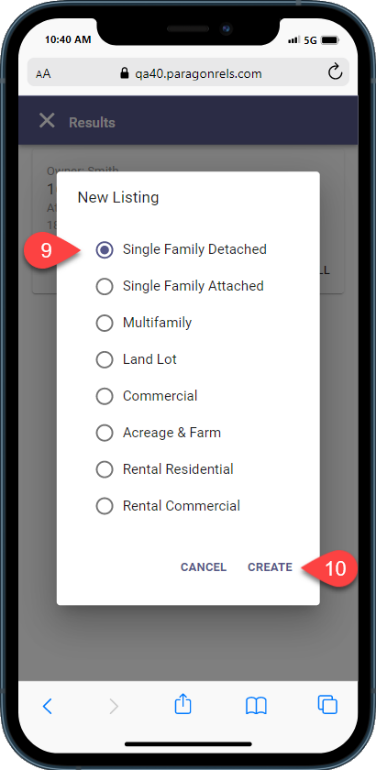
## CRS Data Tax Autofill from Listing Maintenance

CRS Data Tax Autofill will be available for all CRS Data customers. It will appear as an option from the Listing Add + plus sign.





CRS Data Tax Autofill continued…



# Paragon Affiliate Connect

**All options in this section are either configurable via MLS Administration controls or by your System Support Manager as noted.**

# Corrected Paragon Affiliate Connect Issues

|  |  |  |
| --- | --- | --- |
| **Ticket #** | **Module** | **Summary** |
| DEV-7515 | Dashboard | CCA dashboard shows agent subscription page as default page even when the affiliate has already subscribed to agent |