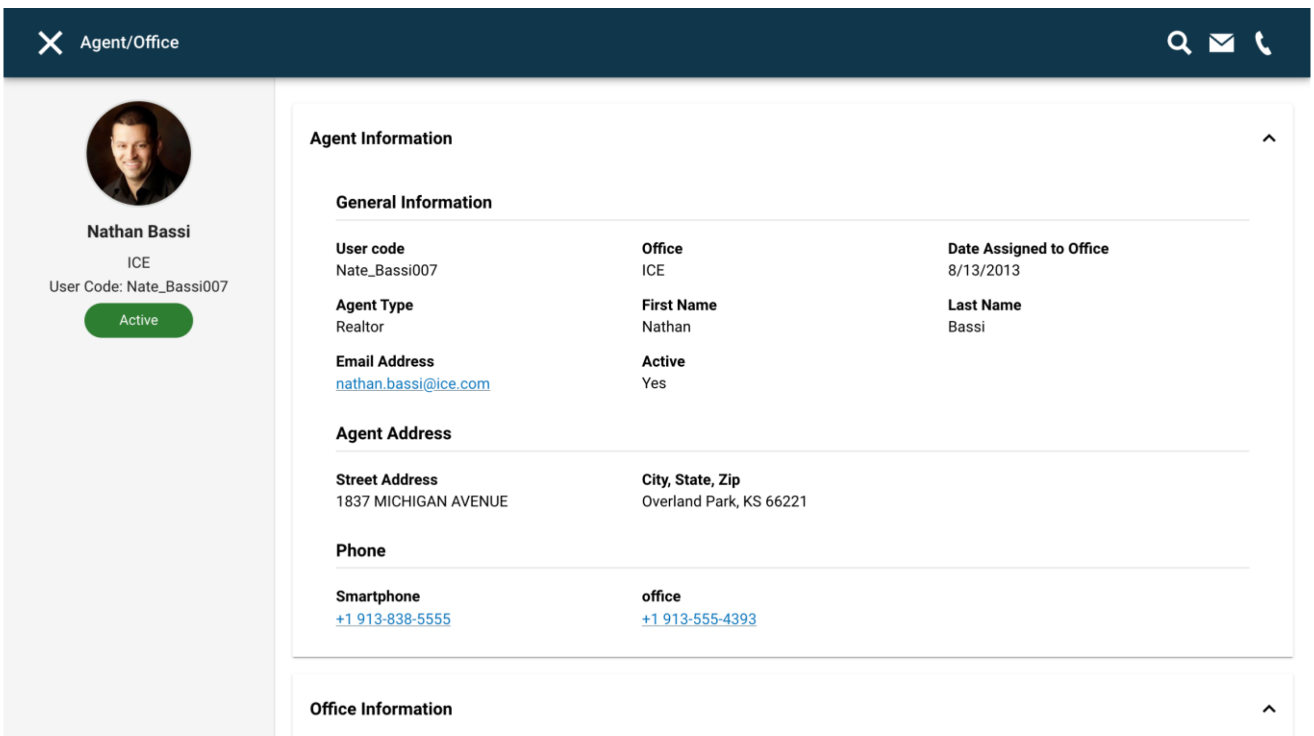
Paragon Connect

Updates to the Roster Page

The Roster page experience has been redesigned to provide MLS members with a faster and more intuitive way to access agent and office information. The refreshed experience introduces a modern layout, improved navigation, and powerful search capabilities that make it easier to locate important details within a roster record. Information is now better organized and easier to scan, helping users quickly find contact information, office details, membership data, and other key records. With responsive support across desktop and mobile devices, the enhanced Roster Page delivers a more efficient and streamlined experience wherever work happens.

Key improvements include:

- Fixed identity sidebar displaying agent photo, name, office, user code, and status information
- Scrollable content area for easier information review
- Responsive layout optimized for desktop, tablet, and mobile devices
- Improved visual organization of agent and office details

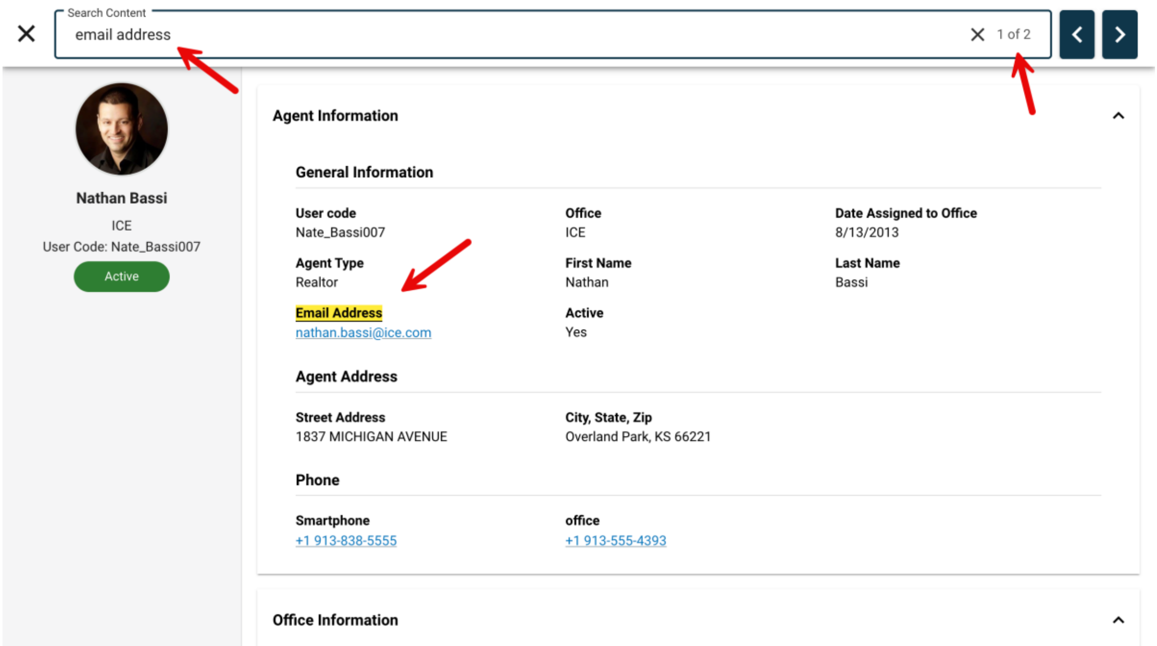


Powerful In-Page Search

Finding information within a roster record is now faster and more intuitive. The new search experience helps users quickly locate specific details within agent and office information without having to manually scan through multiple sections. Search results are highlighted in real time, making it easy to jump directly to the information you need.

Users can:

- Launch search directly from the roster card
- Search field labels in real time
- Navigate between results using next and previous controls
- View result counts while searching
- Easily clear or close searches when finished



Where to Access

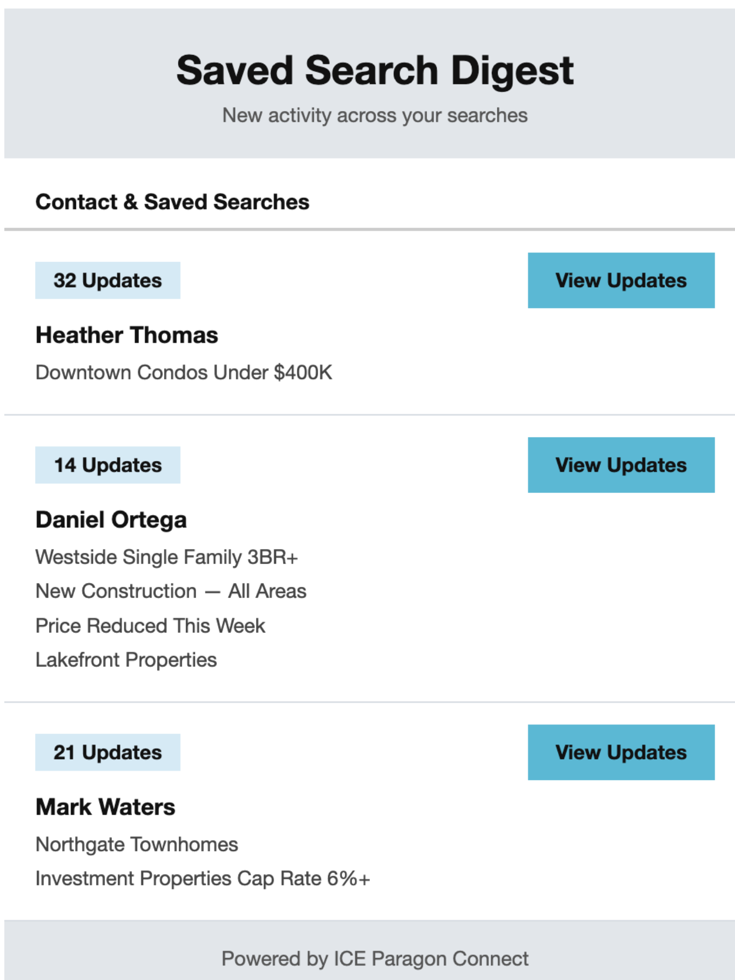
- Membership > Agent Roster
- Membership > Office Roster
  - Select a record and open the Roster Card to experience the new design and functionality.
- Agent Office information on the detail report

New Agent Notification Email

We refreshed the look and feel for the agent-version of auto-notification emails. This new version keeps the "roll-up" format, so agents continue to receive a single email including listing updates across all their Contacts, but with a new layout and deep linking technology to bring agent's directly to the Listing Match Tracker page outlining all the recent listing updates for their Contacts.

Highlights

- New digest style email consolidates listing update activity into a single, easy to review summary.
- Listing preview content has been removed, creating a cleaner and more streamlined email experience. This helps reduce excessive email length and minimizes issues where email providers truncate or cut off messages containing large amounts of content.
- Displays only contacts with updated listing activity and the saved searches that generated new listing updates, ensuring the information remains timely, relevant, and easy to review.
- Each contact includes a dedicated **View Updates** button, allowing agents to jump directly to Paragon Connect to see the related listing updates and act faster.



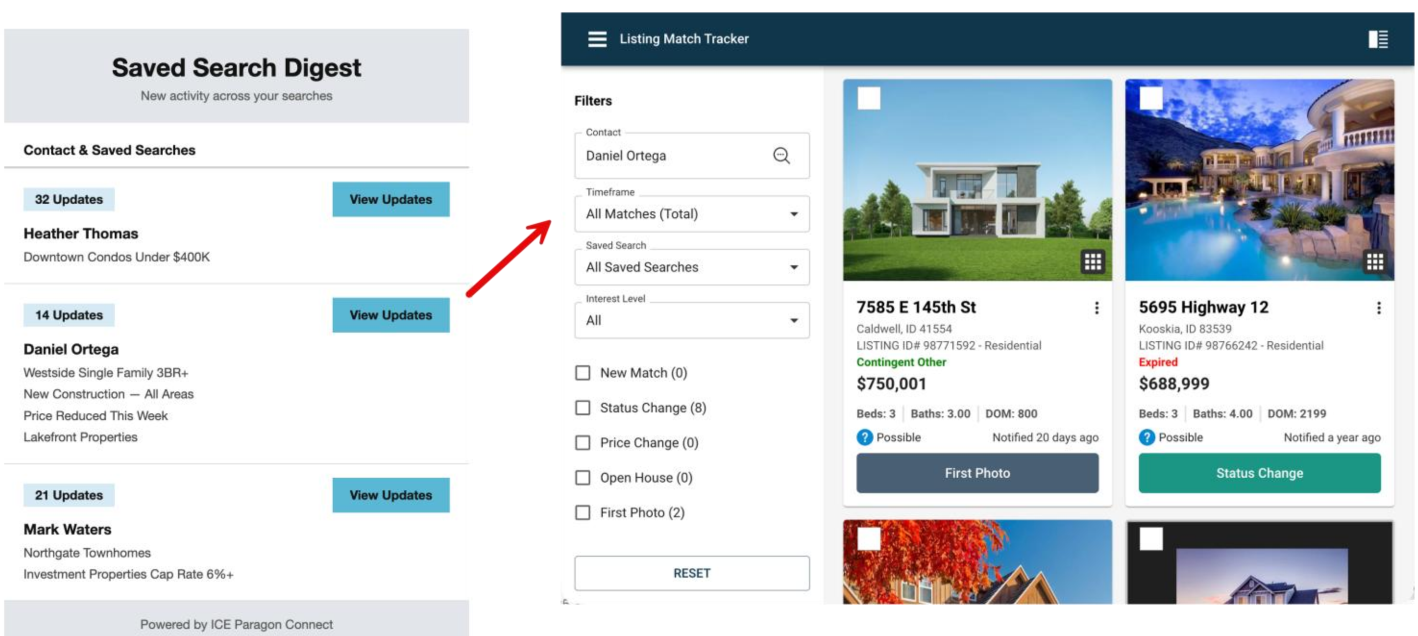
Powered by Listing Match Tracker

The new **Agent Email Notification** is designed to work hand in hand with **Listing Match Tracker**, the central location in Paragon Connect for reviewing and managing listing activity across your contacts. Instead of reviewing lengthy emails filled with listing details, agents can quickly identify which contacts have new activity and use the **View Updates** button to jump directly into Paragon Connect. From there, agents are taken to that contact's Listing Match Tracker, where they can review all saved searches associated with the contact, view the latest listing updates, and better understand how the contact is engaging with available properties.

Benefits

- Each contact includes a dedicated **View Updates** button that takes you directly into Paragon Connect and opens **Listing Match Tracker** for that specific contact, where you can view all saved searches associated with the contact and the latest listing updates generated from those searches.
- Monitor client engagement through **Interest Levels**, including listings marked as **Favorite**, **Possible**, or **Rejected**, helping you better understand client preferences and buying intent.
- Reduce inbox clutter by replacing lengthy listing previews with a streamlined summary that focuses on the most important information.
- Stay focused on active clients and the saved searches producing results, helping prioritize follow up conversations and client engagement.

The result is a cleaner, more actionable **Agent Email Notification** that serves as a launch point into Listing Match Tracker, allowing agents to quickly review listing activity, understand how contacts are engaging with properties, and take action based on the latest market opportunities.

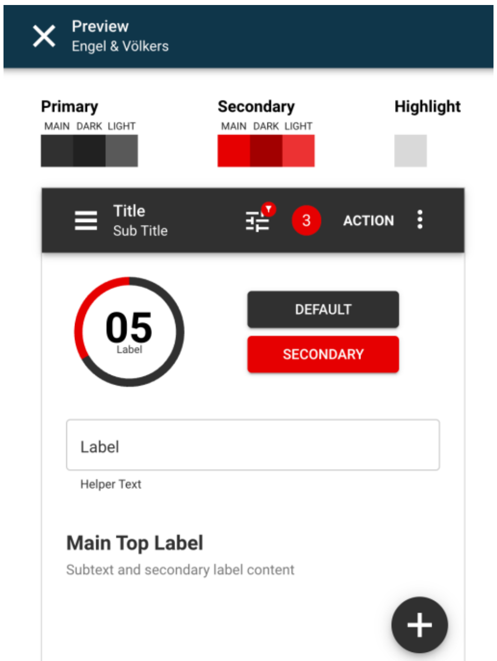


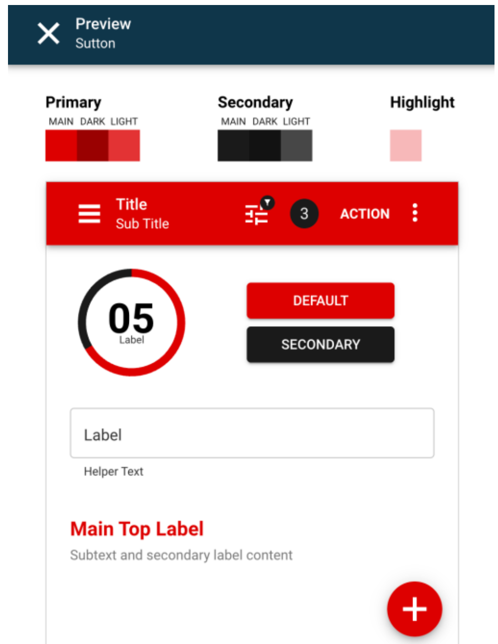
New National Brand Theme Options

Expanded the National Brand Themes selection to include Engel & Völkers and Sutton themes. This update provides additional branding options and greater flexibility for organizations to align the experience with users in this brokerage.

What is New

- Agents within these national brokerages who would like to apply the standard color pallets to their user experience or their public-facing sites/link may select these options from Settings





“My Team” Option available on Hotsheet Search

Finding the right listings just got easier for team-based agents.

Agents who are part of a team can now filter their Hotsheet results using a new **My Team** option in the **Listing Owner** dropdown under **Properties > Hotsheet > Criteria**. This enhancement makes it easy to focus on listings associated with your team without having to search across broader results.

What's New

- Added a new **My Team** filter option in the **Listing Owner** dropdown.
- Positioned **My Team** between **My Listings** and **My Office Listings** for a seamless experience.
- Available exclusively to agents who are members of a team.
- Returns listings owned by members of the agent's team.

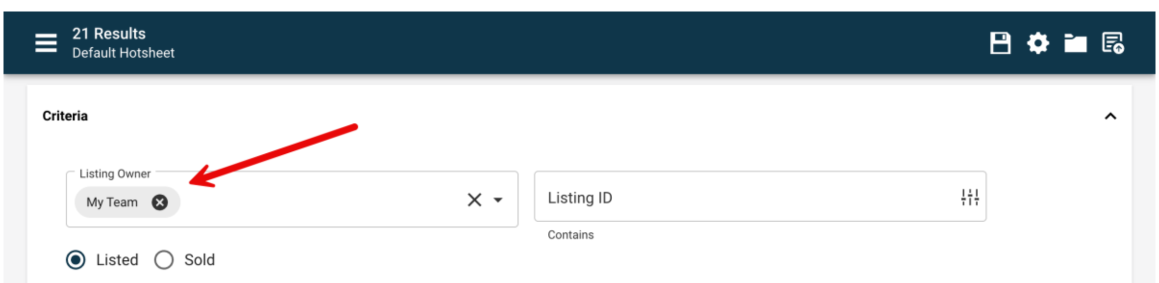
Benefits

- Quickly view activity related to your team's listings.
- Improve visibility into team inventory and market activity.
- Reduce the need to manually refine results when collaborating within a team.
- Create a more streamlined and efficient Hotsheet workflow.

Important

The **My Team** option is displayed only for agents who belong to a team. If you are not currently assigned to a team, this option will not appear in the **Listing Owner** dropdown.

This update helps team members stay focused on the listings that matter most, making it easier to monitor and manage team activity directly from the Hotsheet.



Agent & Office Info now in sync for existing EasyCMAs

Keeping CMA reports accurate and professional is now easier than ever. EasyCMA will automatically reflect the latest agent, office, and contact information without requiring users to recreate reports or perform manual updates.

Dynamic Agent and Office Information

When an agent updates their personal profile or office details, EasyCMA reports that have already been generated will automatically display the latest information in the Agent Information section, including:

- Office logo
- Agent photo
- Email address
- Phone number

This ensures every shared or printed CMA consistently presents the most current branding and contact information, helping agents maintain a professional image while reducing administrative work.

Contact Information Updates

EasyCMA now keeps contact information in sync across the experience.

- The **Created for:** field automatically reflects the currently assigned contact on the CMA.
- If the assigned contact's profile photo changes, the contact image displayed on the EasyCMA dashboard card updates automatically.

Benefits

- Present a more polished and professional CMA experience
- Eliminate manual report updates after profile changes
- Ensure branding and contact details remain accurate across all reports
- Keep contact information synchronized throughout the EasyCMA workflow
- Save time while maintaining consistency across shared and printed materials

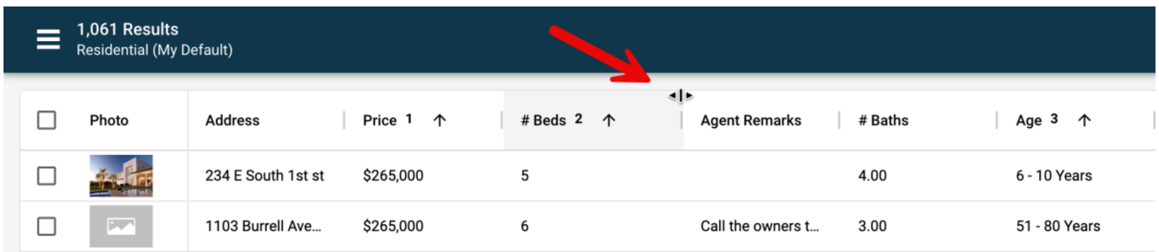
Enhanced Spreadsheet Experience

We have introduced a new spreadsheet experience to make working with large data sets faster, more flexible, and easier to customize. With enhanced data management capabilities, users can sort, organize, and navigate information more efficiently while tailoring table layouts to fit their workflow. These improvements provide a more intuitive experience when reviewing and analyzing large volumes of data across Paragon Connect.

Resize Columns

Gain more control over how data is displayed by adjusting columns to fit your needs.

- Resize columns by dragging column boundaries
- Improve visibility of longer values without impacting the rest of the table
- Create a more personalized view when working with large data sets

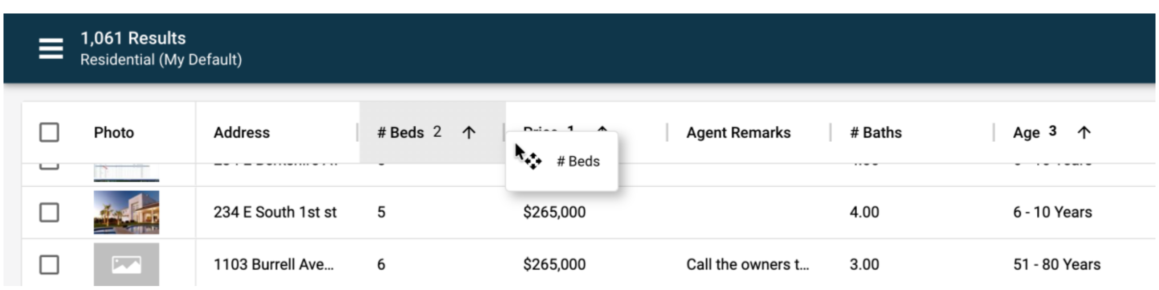


Drag and Drop Columns

Reorganize columns with a simple drag and drop experience to match your preferred workflow. Customize the layout to prioritize the information that matters most and create a workspace that works best for your team.

Rearrange columns using drag and drop

- Instantly update the table layout without refreshing the page
- Surface the most important information by moving key columns into view
- Maintain a more efficient working experience across data-rich screens
- Changes to column order are session based and are not saved to your default layout.

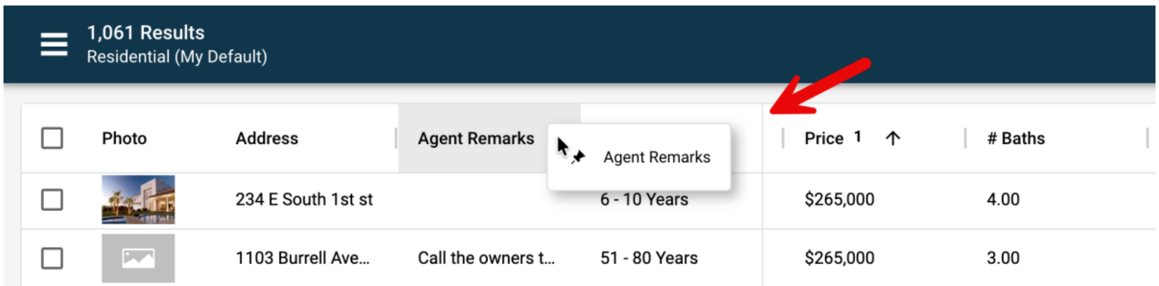


Pin Columns Left and Right

Keep important information visible while working with wide tables. Pin frequently used columns to the left or right side of the grid so they remain in view as you scroll horizontally through large datasets.

Pin important columns to the left or right side of the table

- Pin 1 or more columns to the left or right for quick access to critical information.
- Pinned columns remain visible while scrolling across the table.
- Helps reduce horizontal scrolling when reviewing large amounts of data.
- Ideal for keeping key identifiers, statuses, or frequently referenced fields in view.



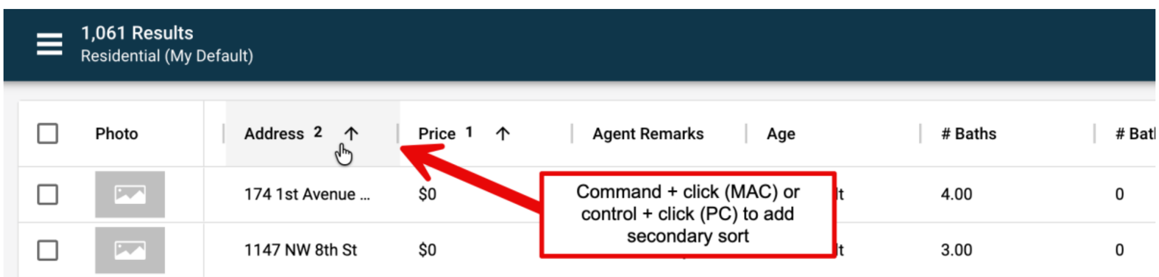
Multi-Column Sorting

Quickly sort and organize data directly from the grid. A single click on any column header sorts the results by that column. Click the same column again to toggle between ascending and descending order, making it easy to find the information you need.

For more advanced data analysis, multi-column sorting allows you to sort by multiple fields simultaneously. On Mac, hold the **Command** key while clicking additional column headers to add secondary and tertiary sorting. Holding **Command** and clicking a sorted column toggles its sort direction between ascending and descending. On Windows, use **Control + Click** to achieve the same functionality.

Key Details

- Single click a column header to sort by that column.
- Click the same column again to switch between ascending and descending order.
- On Mac, use **Command + Click** to add additional sort columns.
- On Windows, use **Control + Click** to add additional sort columns.
- **Command + Click** or **Control + Click** on an already sorted column changes its sort direction.
- Supports multi-level sorting for more precise data organization and analysis.



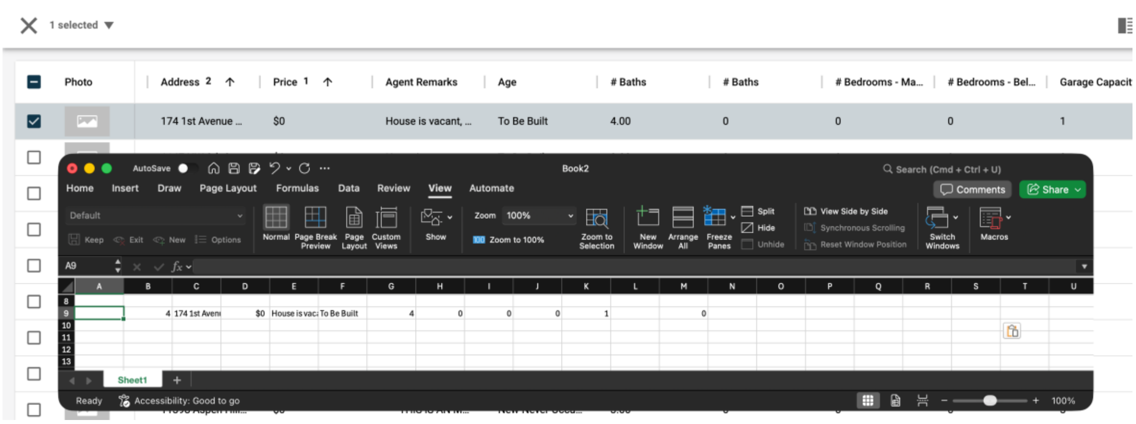
Copy and Paste Data

Move information between applications with greater efficiency by copying data directly from the results table. Quickly transfer selected records into spreadsheets, reports, presentations, or other business tools without the need for exports, helping reduce manual effort and accelerate everyday workflows.

Using familiar keyboard shortcuts, you can copy a selected row and immediately paste it into the applications you use every day. This makes it easier to analyze data, create reports, validate information, and collaborate with colleagues across multiple systems.

Key Details

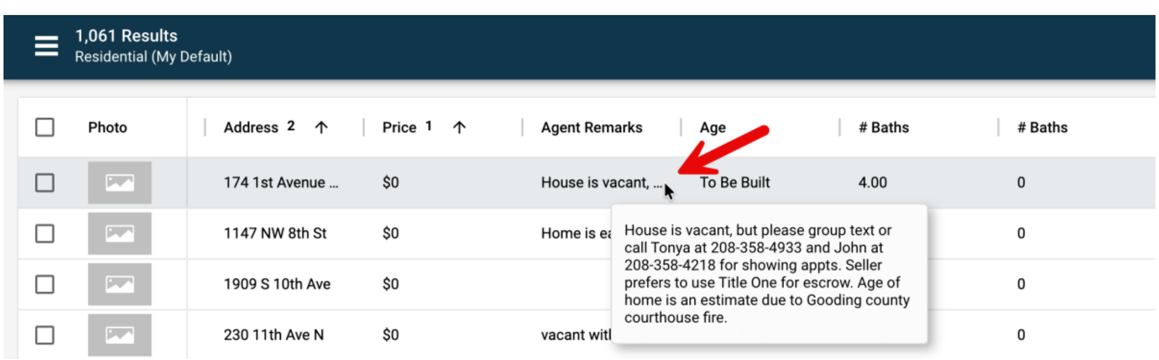
- Copy a selected row directly from the table using standard keyboard shortcuts.
- Use **Command + C** on Mac or **Control + C** on Windows to copy selected record.
- Paste data directly into spreadsheet, reporting, and business intelligence tools.
- Preserve row and column structure for easier analysis and review.
- Quickly share listing information with team members and stakeholders.
- Streamline analysis, reporting, auditing, and data validation tasks.



Hover Tooltips for Truncated Content

View complete values without expanding columns or opening additional screens.

- **Hover** over truncated cell content to view the full value in a tooltip
- Makes long names, descriptions, and identifiers easier to review
- Available on desktop experiences where hover interactions are supported



Multi-Sort Customizations - Default

Finding the right listings just got easier. Agents can now create and default multi-column sorting in Paragon Connect Spreadsheet View, giving them more control over how search results are organized and displayed.

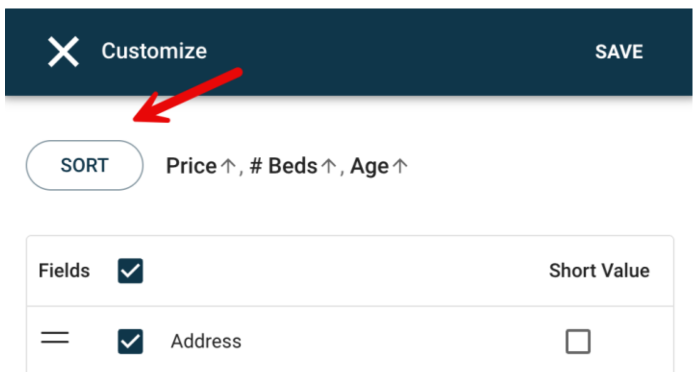
What's New

You can now set your default sort and save spreadsheet layouts by up to three columns at the same time:

- Primary Sort
- Secondary Sort
- Tertiary Sort

Enhanced Sort Management

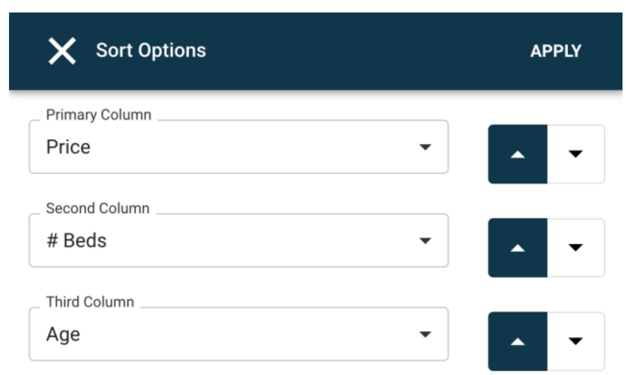
A new **Sort** button has been added to the Customize panel, providing quick access to the new Sort Options experience. The currently applied sort columns are displayed beside the button, including the sort direction for each column, making it easy to see how results are being organized at a glance.



Flexible Multi Level Sorting

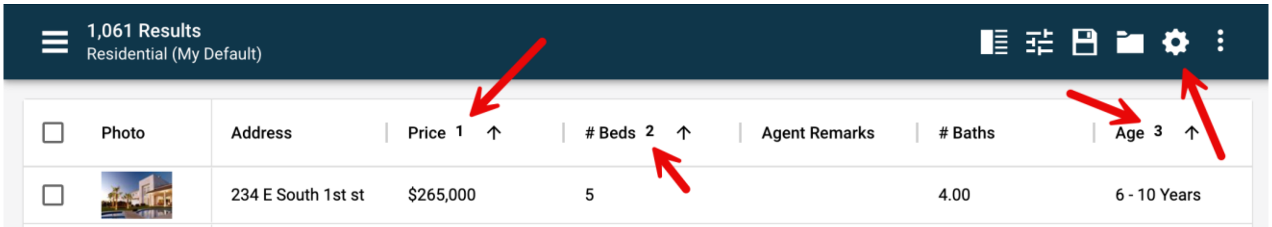
Within Sort Options, agents can:

- Select up to three fields to define sorting priorities
- Choose ascending or descending order independently for each field
- Choose from the columns currently included in the spreadsheet view
- Avoid duplicate selections through dynamically updated field lists
- Save preferred sort configurations as part of their spreadsheet customization settings



Sorted column headers now clearly display both the sort direction and the sort priority (1, 2, or 3), making it easy to understand how results are ordered.

Benefit
This update gives agents greater control over large result sets, making it faster to identify, compare, and prioritize listings based on the criteria that matter most to their workflow.



Additional Enhancements

- Increased the default number of displayed results from **25 to 50 records**, reducing the need to load additional data as frequently.
- Infinite scrolling has been enhanced to load **50 additional records at a time**, allowing you to browse larger result sets more efficiently.
- Selected rows are now clearly **highlighted**, making it easier to identify and manage one or multiple selected records while working in the grid.

Watch a Property with Notes and Contacts in One Step

Managing Creating and managing Property Watches is now more convenient. Users can add notes and assign contacts directly when creating a Property Watch from the property map or Public Record Detail view, allowing important property details and relationships to be captured in a single step.

What's New

When selecting the watch icon from the map or Public Record Detail page, a new Property Watch modal opens, allowing users to:

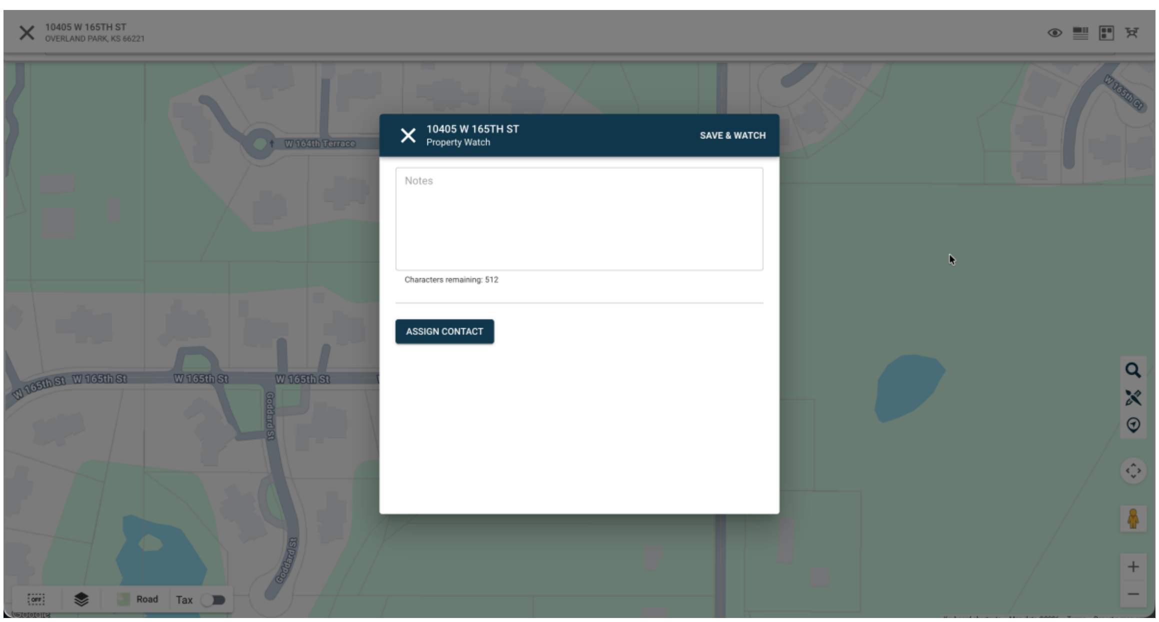
- Start watching a property in one streamlined workflow
- Add an optional note before saving
- Assign one or more contacts during setup
- Save everything at once with **Save & Watch**

Improved User Experience

- Save a watch even if no note or contacts are added
- Exit confirmation protects users from accidentally losing unsaved information
- Success notification confirms when a property is being watched

User Benefits

This enhancement reduces navigation, saves time, and keeps users focused on their workflow by allowing Property Watches, notes, and contact assignments to be completed in a single action. The result is a faster, more intuitive experience for tracking properties and capturing important details exactly when they're needed.



More Control Over Contact Saved Searches

Agents can now manage contact-created saved searches directly from the Buyer Activity page in Paragon Connect, making it easier to guide the listings their clients see and stay aligned with their search needs.

What's New

- Added an **Edit Search** option to the overflow menu for contact-created saved searches on the **Buyer Activity** page.
- Selecting **Edit Search** takes agents directly to their contact's **Collaboration Center in Agent Mode**.
- This streamlined workflow makes it faster to review and update search criteria on behalf of contact without needing to manually navigate to the Collaboration Center.

Benefits

- Gives agents greater control over contact search experiences.
- Reduces navigation steps when managing saved searches.
- Helps keep contact search criteria accurate and up to date, leading to more relevant listing recommendations.