

Tips & Tricks

Paragon 3x Customize Spreadsheet Results View

Paragon v3.x offers the ability to create custom spreadsheet views for your search results. This installment of Tips & Tricks reviews customizing the spreadsheet view for each class.

First let's start by naming the spreadsheet something you will recognize in the Select View drop-down menu or under the View/Reports button under Spreadsheets, and then setting the view as your default. For this exercise we will call the spreadsheet "My View". Use the following steps to customize the view:

1. Click on Preferences
2. Select Views/Reports
3. Click on the Spreadsheets tab (Paragon should default to this tab)
4. You can select any of the first five spreadsheets, but for this exercise click on the first spreadsheet. It might be called Default Spreadsheet or just Spreadsheet (Fig. 1).
5. The following web page dialog window will launch (Fig. 2).



Figure 1

Set the view for **each** class by selecting the class from the dropdown and updating the selected fields

Rename the spreadsheet here

Check the box next to the field you want to include and click the "Add >" button

To order the columns, check the box next to the item; click the Move Up, Move Down button to reposition the field

Click here to set as default spreadsheet

Click the "Set Sort" button to determine how the records are sorted in the results

Figure 2

6. Rename the view to "My View" or whatever name you want to use for your spreadsheet.
7. From this view (Fig. 2) you can move fields to and from the Available and Selected windows by checking the boxes and clicking the "Add >" or "< Remove"

buttons. You can also change the order of the fields in the Selected window by checking the box and clicking the “Move Up” or “Move Down” button.

8. You can set how you want the records to sort by clicking on the “Set Sort” button.
9. Select the initial sort option. You can either select second and third sort options or leave them blank by leaving “Select a column” in the drop down menu (Fig. 3).
10. Click OK to save the sort
11. Once you have finished adding/removing/repositioning fields and you have renamed the spreadsheet, you can also set the spreadsheet to be your default spreadsheet by clicking the “Use As Default” box at the bottom right corner of the Web Page Dialog window.
12. Finally, you will need to set up the desired fields for each class! The spreadsheet that you just set up for Residential WILL NOT appear for the other classes. To set up the preferred fields for each class, just select the class from the “Class:” drop-down menu and repeat the steps above.
13. Your new view (My View) now appears under Views/Reports > Spreadsheets

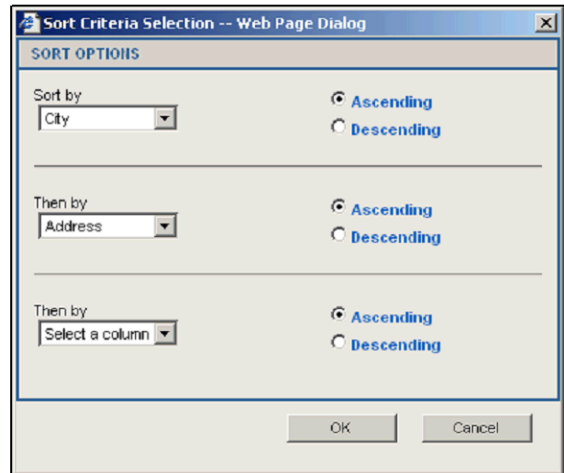


Figure 3

Note: This is where you set and save the order for the spreadsheet. You can also move the fields while in Spreadsheet View, but the order will not save here—it must be done using the above steps.

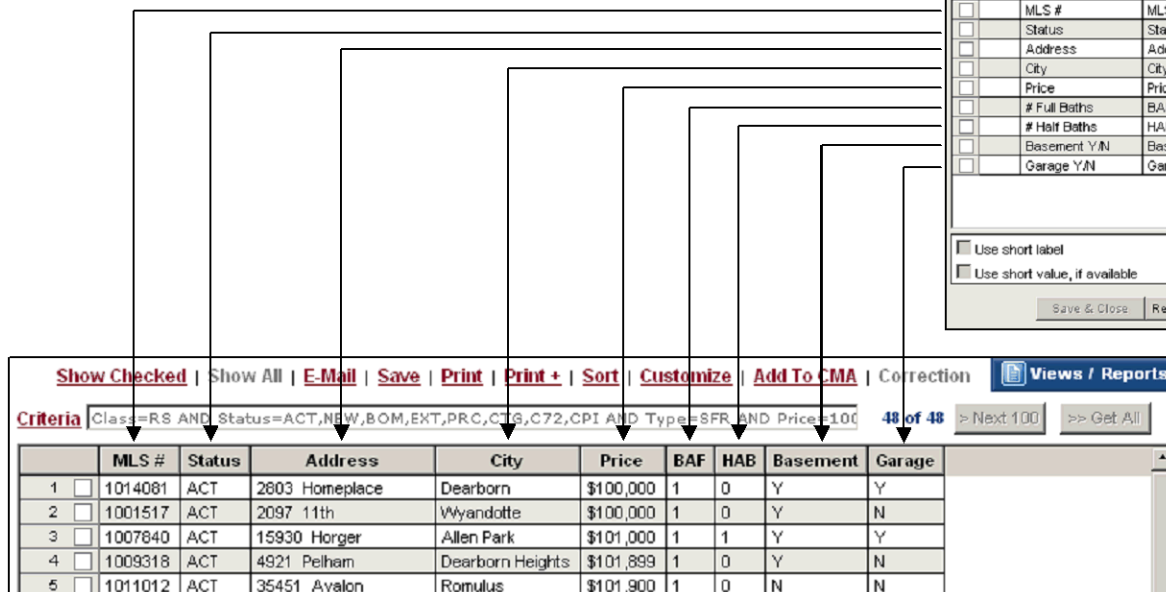
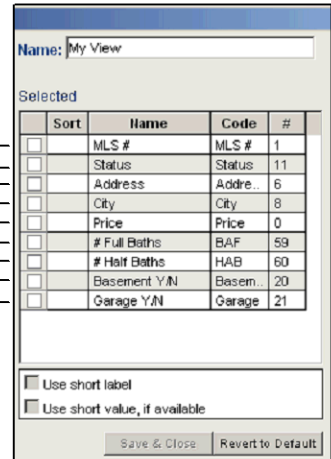


Figure 4

Good luck with this tool!

FNIS MLS Systems Division

If you have a suggestion for Tips & Tricks, please email mlsinfo@fnis.com or call 800.468.6221.

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