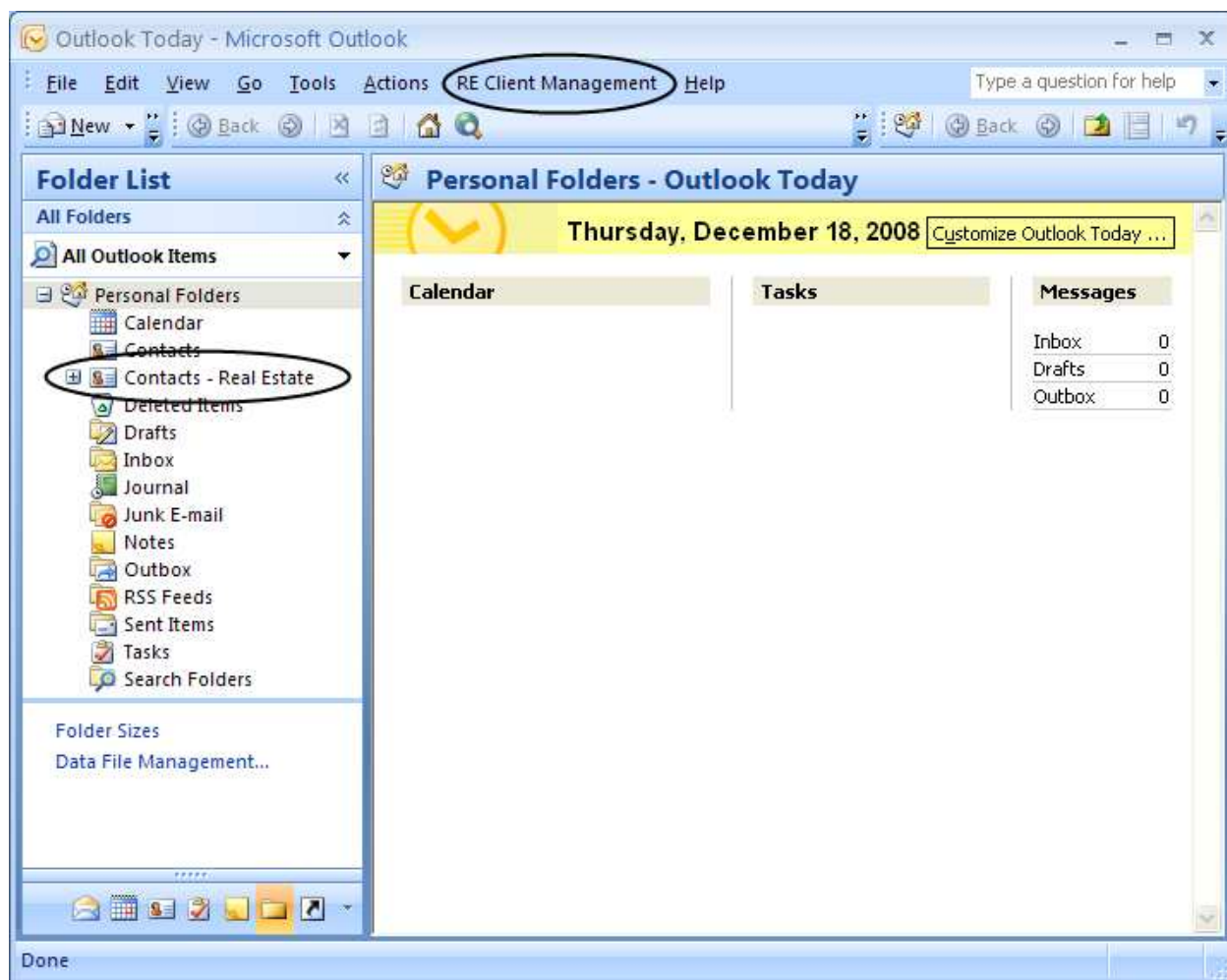


REAL ESTATE CLIENT MANAGEMENT QUICK START GUIDE

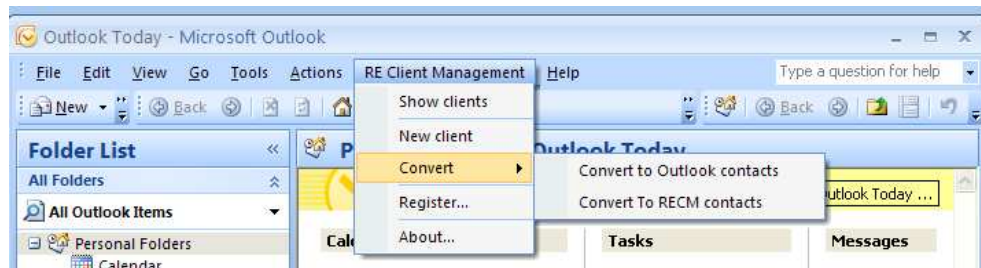
The purpose of the quick start guide is to help you get started using the Real Estate Client Management (RECM) product quickly. For a more in-depth quick start, watch the Overview Tutorial video at:

www.RealEstateClientManagement.com/Tutorial.aspx

When you first open Microsoft Outlook after the installation, you'll notice a new menu item (RE Client Management) and a new contact folder (Contacts-Real Estate). We'll walk you through each of these.



RE Client Management Menu



1. **Show clients.** Opens the “Contacts – Real Estate” folder. This is where your Real Estate Contacts are kept.
2. **New Client.** Creates a new Real Estate Contact. We’ll walk through the forms in the next section.

A screenshot of the RECMClient application window, titled 'Untitled - RECMClient'. It features a menu bar (File, Insert, Format Text, Developer) and a toolbar with icons for saving, deleting, and other actions. The main area is a form for creating a new client. It includes fields for 'Full Name', 'Company', 'Job Title', 'Spouse', 'Spouse Job Title', 'Spouse Company', 'Spouse Business Phone', 'Spouse Home Phone', 'Spouse Mobile Phone', and 'File As'. There are also dropdown menus for 'Client Status' (Inactive), 'Probability' (Medium Probability), 'Reason' (Move Up), and 'Source' (Sphere Of Influence). Buttons for 'New Listing' and 'New Purchase' are on the right. At the bottom, there are tabs for 'Client Details', 'Listings', 'Purchases', and 'Family Details', and a large text area for 'Address'.

3. **Convert to Outlook contacts.** This will convert your RECM contacts back to the standard Microsoft Outlook format and copy them to the selected “Contacts” folder.

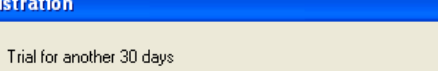
A screenshot of the 'CopyContactsForm' dialog box. It has a title bar with a close button. Inside, there's a 'Copy to...' button and a 'Convert Selected' button. Below these is a table with columns: 'Full Name', 'Company', 'Mobile Phone', and 'Business Phone'. The table contains two rows of data: 'Jane Doe' with mobile phone '(568) 555-1212' and 'John Smith' with mobile phone '(934) 555-1212'. At the bottom, there are checkboxes for 'Select None' and 'Select All'.

- a. Select “Copy to ...” to select the folder you’d like the converted contacts copied to.
- b. Check the contacts you wish to convert and then select “Convert Selected” to convert the contacts back to Microsoft Outlook format.

4. **Convert to RECM Contacts.** This allows you to convert your standard Microsoft Outlook contacts to RECM format. The Microsoft Outlook contacts will be left in their current folder and a copy created in the “Contacts – Real Estate”.

[illegible]

- a. Select “Copy From” to choose the folder you wish to convert the contacts from
 - b. Check the contacts you wish to convert then select “Convert Selected” to convert the contact to RECM format
5. **Register...** Register your product with your Email address you used to purchase RECM and the Key that was sent to you with your order. Visit www.RealEstateClientManagement/BuyNow.aspx to purchase RECM.



Registration


Trial for another 30 days

Email:

Key:

Set

6. **About.** Shows information on RECM such as version number and registration information. If you haven't registered, it will also show the days remaining on your trial.



About RECM

Version: 1.0

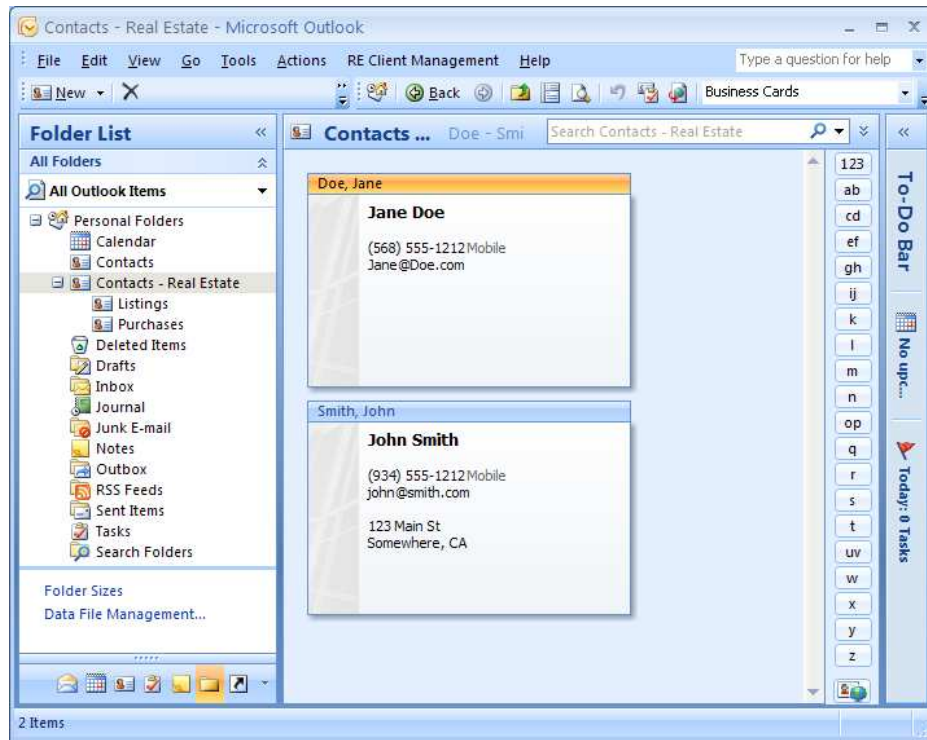
Licensed to: Trial

License Key: -1

Days Remaining in Trial: 30

CONTACTS – REAL ESTATE FOLDER

When you installed RECM, three folders were created: The main folder “Contacts – Real Estate” and two sub-folders: “Listings” and “Purchases”. The “Contacts-Real Estate” folder contains Client Contact forms. For each Client, you can create multiple Seller Listing (stored in the “Listing” folder) and multiple Buyer Purchase (stored in the “Purchase” folder).



1. To create a New Client contact, select “New Client” from the RE Client Management menu. Or, you can double click within the folder (just like creating any standard Microsoft Outlook contact). This will open a new Client Form.
2. To open an existing Client contact, just double click on the contact.

Client Form

The screenshot shows the RECMClient application window titled "John Smith - RECMClient". The interface includes a ribbon with tabs: RECMClient, Insert, Format Text, and Developer. The "Activities" button in the "Developer" tab is highlighted with a red box and the number 4. Below the ribbon, the form is divided into several sections. On the left, there are fields for "Full Name...", "Job Title:", "Company:", "Business", "Home", "Business Fax", and "Mobile". In the center, there are fields for "Spouse:", "Spouse Job Title:", "Spouse Company:", "Spouse Business Phone:", "Spouse Home Fax:", "Spouse Mobile Phone:", and "File As:". On the right, the "Client Information" section (labeled 1) contains radio buttons for "Buyer", "Seller", and "Both Buyer And Seller", and dropdown menus for "Client Status:", "Probability", "Reason:", and "Source:". To the right of this section are two buttons: "New Listing" and "New Purchase" (labeled 2). Below the "Client Information" section, there are tabs for "Client Details", "Listings", "Purchases", and "Family Details" (labeled 3). The "Listings" tab is currently selected. Below the tabs, there are fields for "Address...", "E-mail", and "Display As:". At the bottom, there are fields for "Contacts..." and "Categories...", and a "Private" checkbox.

In addition to the Client and their Spouse (significant other) information, there are three new areas: 1) Client Information; 2) Create a New Transaction; 3) Listing, Purchase, and Family Details tabs. We've also marked 4) Activities – this is a standard page on any Microsoft Outlook form but one that we find a lot of Outlook users don't know about.

1. Client Information. This lets you track specific information on the client type, status, probability of a transaction, why they're working with you and the source of the lead. You can edit the Reasons and Sources. The other fields will be used for report generation and are not editable.
2. Create a new Listing or Purchase transaction. Will discuss these forms in the next sections.

The image displays two side-by-side screenshots of the RECM - RECMPurchase application interface.

Left Screenshot (Property Details):

- Client:** John Smith
- Transaction Name:** 123 Main St
- Use Street Address:** ☒
- Property Details:**
 - Address: 123 Main St, Somerville, CA
 - Status: Active
 - List Price: \$0
 - List Date: 18 December 2001
 - Area:
 - Original Price: \$0
 - Expiration Date: 21 June 2009
 - Resand: ☐
 - Subdivision:
 - Sale Price: \$0
 - Sale Date: None
 - Use Client's House Address: ☒
- General Details:**
 - MLS ID:
 - Tax ID:
 - Taxes: \$0.00
 - Tax Year:
 - Type: Single Family
 - Sq Ft: 0
 - Soft Source: Public Record
 - Lot Size: 0.00 Acres
 - Year Built:
 - Style:
 - Garage: 2 Car
 - Additional Parking: None
 - HOA Dues: \$0
 - Frequency: Not Applicable
- Room Details:**
 - Bedroom: 0
 - Living Room: 0
 - Fireplace: 0
 - Attic: No
 - Bath - Full: 0
 - Family Room: 0
 - Office: 0
 - Theater/Media Room: No
 - Bath - 3/4: 0
 - Guest Room: 0
 - Study/Den: 0
 - Fitness Center: No
 - Bath - 1/2: 0
 - Kitchen: 0
 - Loft: 0
 - Pool: No
 - Bath - Total: 0
 - Laundry: 0
- Other:**
 - ☐ Tenant Occupied
 - ☐ Nightly Rentals Allowed
 - ☐ Pet Restrictions
 - Assessment Amount: \$0.00
 - Purpose:
 - Other Restrictions:

Right Screenshot (Description of Requirements):

- Client:** John Smith
- Transaction Name:**
- Status:**
- Requirements Definition:**
- Description of Requirements:**
- Transaction:** None
- Price Min/Max:** \$0.00 / \$0.00
- Bedroom:** None
- City/State:**
- Sq Ft Min/Max:** 0 / 0
- Bath:** None
- Area:**
- Type:**
- Garage:** None
- Lot Size:** 0
- Style:**
- Age:** None
- Interior Features:**
 - ☐ Air Conditioning
 - ☐ Formal Dining
 - ☐ Family Room
 - ☐ Fireplace
 - ☐ Hardwood
 - ☐ Den/Office
- Exterior Features:**
 - ☐ Pool
 - ☐ Spa/Hot Tub
 - ☐ Log Cabin
 - ☐ Back Construction
 - ☐ Barn/Horse Facilities
- Lot Features:**
 - ☐ Corner Lot
 - ☐ Golf Course/Lot
 - ☐ Club de-Jac Lot
 - ☐ Level Lot
 - ☐ View
- Community Associations:**
 - ☐ Club House
 - ☐ Pool
 - ☐ Tennis
 - ☐ Golf
 - ☐ Gated Community
 - ☐ School

3. Tabs

- a. **Family Details.** This tab allows you to track details like Birthdays, Anniversaries, Children. If you click on the calendar icon, a date picker will pop up allowing you to enter a date. If you click on the remind button, then an appointment form will open set to the date you entered. You can chose to make this a onetime event or reoccurring event.

Client Details Listings Purchases Family Details			
Birthday: <input type="text" value="None"/> <input type="button" value="Remind"/>	Spouse Birthday: <input type="text" value="None"/> <input type="button" value="Remind"/>	Anniversary: <input type="text" value="None"/> <input type="button" value="Remind"/>	
Contact Notes:		Spouse Notes:	
Children			
Name	Birthday		Notes
<input type="text"/>	<input type="text" value="None"/>	<input type="button" value="Remind"/>	<input type="text"/>
<input type="text"/>	<input type="text" value="None"/>	<input type="button" value="Remind"/>	<input type="text"/>
<input type="text"/>	<input type="text" value="None"/>	<input type="button" value="Remind"/>	<input type="text"/>
<input type="text"/>	<input type="text" value="None"/>	<input type="button" value="Remind"/>	<input type="text"/>
<input type="text"/>	<input type="text" value="None"/>	<input type="button" value="Remind"/>	<input type="text"/>

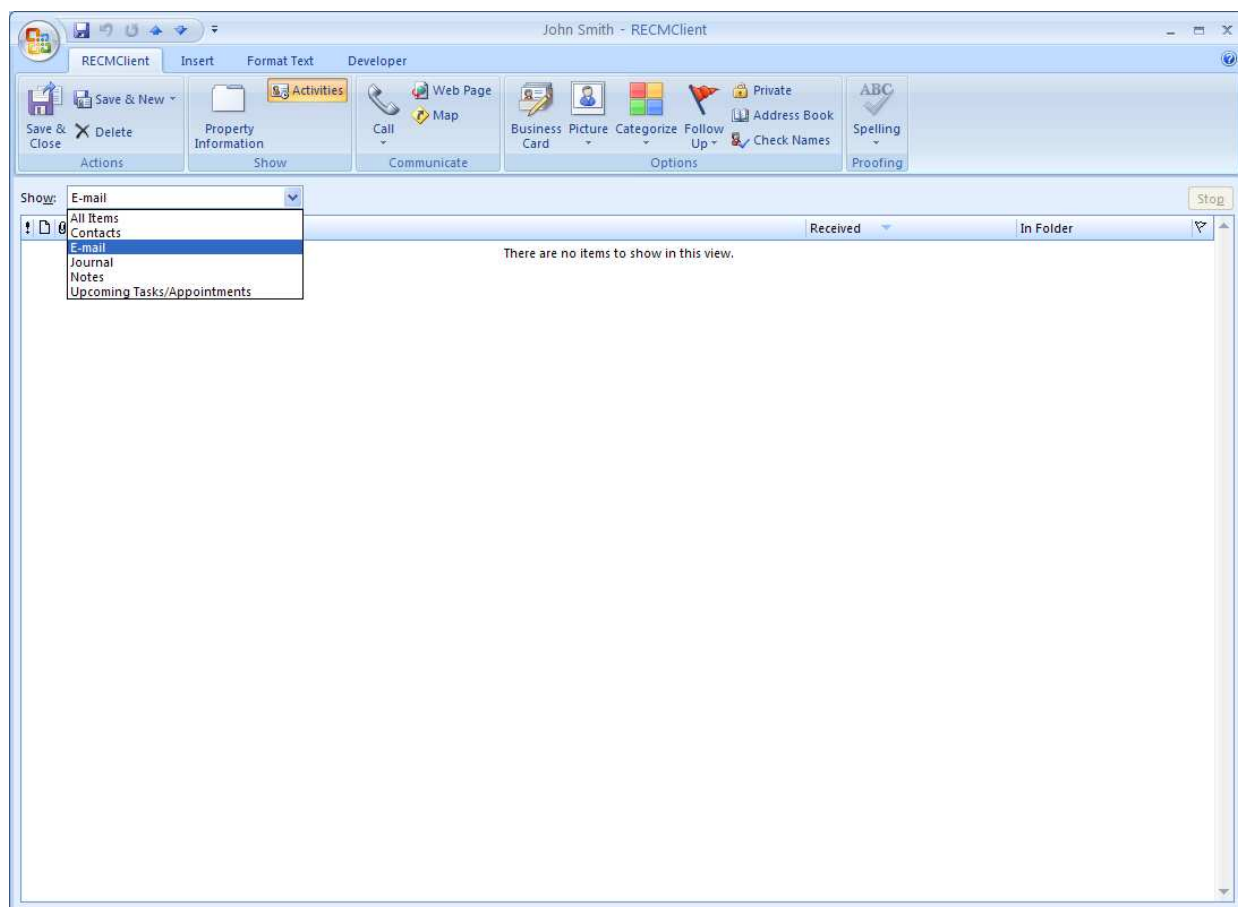
- b. Listings. If you have created and saved a listing then it will appear on this tab. You can double click the Listing to open it.

[illegible]

- c. **Purchases.** If you have already create and saved a Purchase then it will appear on this tab. You can double click the purchase transaction to open it.

[illegible]

4. **Activities Page.** This is very powerful tool found on any Microsoft Outlook contact form and we've incorporated it into our form as well. Basically it allows you to find activities (emails, appointments, tasks, etc.) that are associated with this contact.



LISTING FORM

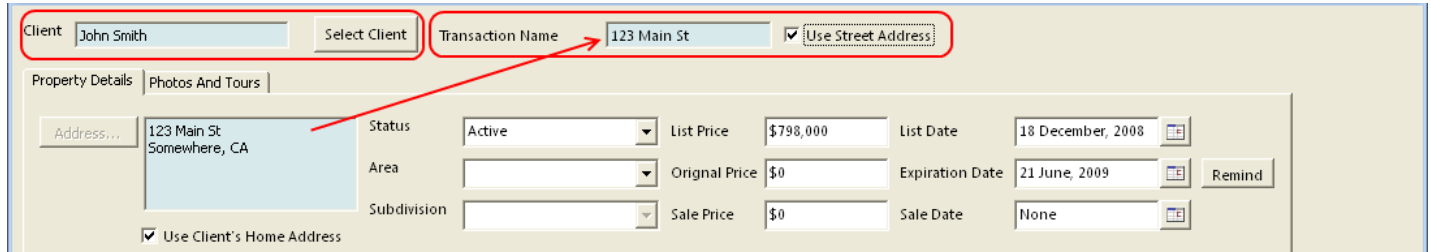
Forms for each Listing transaction are kept in the Listing folder. We strongly suggest that you only create Listing Forms via the Client Form. This ensures that the each listing transaction is properly associated with a specific client.

There are four main pages on the Listing Form: 1) Property Information; 2) Listing Agreement; 3) Offer; and 4) Contacts. This guide will give a quick overview of each.

PROPERTY INFORMATION PAGE

1. CLIENT TO LISTING FORM RELATIONSHIP

At the top of the Property Information there are two critical fields: Client and Transaction Name. These two fields are combined (<client name> <transaction name> ... i.e. John Smith 123 Main St) to create a unique identifier for the transaction. If you were to look in the Contacts – Real Estate / Listings folder, you would see the below form named “John Smith 123 Main St”.



The screenshot shows the top section of the Listing Form. The 'Client' field contains 'John Smith' and the 'Transaction Name' field contains '123 Main St'. A red box highlights both fields, and a red arrow points from the 'Transaction Name' field to the 'Address...' field below it. The 'Address...' field contains '123 Main St Somewhere, CA'. The 'Status' field is set to 'Active'. The 'List Price' is '\$798,000'. The 'List Date' is '18 December, 2008'. The 'Original Price' is '\$0'. The 'Expiration Date' is '21 June, 2009'. The 'Sale Price' is '\$0'. The 'Sale Date' is 'None'. There is a 'Remind' button. A checkbox labeled 'Use Client's Home Address' is checked.

If you create the Listing form from the “New Listing” button in the Client Form, then the Client’s Name is automatically filled in for you and a relationship established between that client and this listing. If you choose to create the listing form another way (e.g. double clicking from within the listing folder) then you’ll need to click the “Select Client” button and choose a client to associate the listing with.

Notice that if you create the listing from the Client form, the listing address is automatically filled in using from the clients home address. To enter a different address, uncheck the “Use Client’s Home Address”

The “Transaction Name” is uses the Listing’s street address as default. If you enter a different name, uncheck “Use Street Address”.

We strongly recommend that you create your listings through the Client Form. This will ensure that a proper Client to Listing relationship is setup. And, fills in the critical parts of the Listing form for you.

2. PROPERTY DETAILS TAB

Except for the street Address, the other fields on the Property Details are optional. But, we would recommend filling in at least the “List Price”, setting the List Date, and setting the Expiration Date.

The screenshot shows the RECMListings software interface. The title bar reads "John Smith 123 Main St - RECMListings". The menu bar includes RECMListings, Insert, Format Text, and Developer. The toolbar contains various icons for actions like Save & New, Delete, Property Information, Listing Agreement, Offer, Contacts, Web Page, Map, Call, Business Card, Picture, Categorize, Follow Up, Private, Address Book, Check Names, Spelling, and Proofing. The main form is divided into several sections:

- Client:** John Smith, Transaction Name: 123 Main St, Use Street Address: ☒
- Property Details:**
 - Address: 123 Main St, Somewhere, CA
 - Status: Active
 - Area:
 - Subdivision:
 - List Price: \$798,000
 - Original Price: \$0
 - Sale Price: \$0
 - List Date: 18 December, 2008
 - Expiration Date: 21 June, 2009
 - Sale Date: None
 - Use Client's Home Address: ☒
- General Details:**
 - MLS ID:
 - Tax ID:
 - Taxes: \$0.00
 - Tax Year:
 - Type: Single Family
 - Sq Ft: 0
 - SqFt Source: Public Record
 - Lot Size: 0.00 Acre
 - Year Built:
 - Style:
 - Garage: 2 Car
 - Additional Parking: None
 - HOA Dues: \$0
 - Frequency: Not Applicable
- Room Details:**
 - Bedroom: 0
 - Living Room: 0
 - Fireplace: 0
 - Attic: No
 - Bath - Full: 0
 - Family Room: 0
 - Office: 0
 - Theater/Media Room: No
 - Bath - 3/4: 0
 - Great Room: 0
 - Study/Den: 0
 - Fitness Center: No
 - Bath - 1/2: 0
 - Kitchen: 0
 - Loft: 0
 - Pool: No
 - Bath - Total: 0
 - Laundry: 0
- Other:**
 - Tenant Occupied: ☐
 - Nightly Rentals Allowed: ☐
 - Pet Restrictions: ☐
 - Assessment Amount: \$0.00
 - Purpose:
 - Other Restrictions:

To create a reminder for the Expiration date, click the “Remind” button. This creates an calendar appointment with the subject being the Listing Expiration : <client Name> - <transaction name> (in this case Listing Expiration: John Smith - 123 Main St).

This block contains two screenshots illustrating the reminder creation process. The top screenshot shows the "Pick date..." calendar dialog box, which is open over the "Expiration Date" field (21 June, 2009) in the RECMListings form. A red box highlights the "Remind" button, and a red arrow points from it to the "Pick date..." dialog. The bottom screenshot shows the "Listing Expiration: John Smith - 123 Main St - Event" window. A red arrow points from the "Remind" button in the top screenshot to the "Appointment" button in the bottom screenshot. The event window shows the subject "Listing Expiration: John Smith - 123 Main St", location, start time (Sun 6/21/2009 12:00 AM), end time (Sun 6/21/2009 12:00 AM), and a checked "All day event" option.

You can also edit the values for many of the dropdown fields. These changes will be available for all forms. So in the example below, the “Area” dropdown was edited. If you open the “Area” field on the Purchase Form, the values you input here would be available there. We recommend that you take a few moments to enter the values for your local market – then they will be available whenever you create a new listing or purchase transaction.

The image shows a software interface with a form and a modal dialog box. The form has several fields: 'Status' (Active), 'Area' (empty dropdown), 'Subdivision' (list with 01 - Old Town, 02 - Lower Deer Valley, 03 - Deer Crest, 04 - Upper Deer Valley, and '< Edit this list...>'), 'Taxes' (\$0.00), 'Record' (empty dropdown), 'Lot Size' (0.00 Acre), 'Additional Parking' (None), 'Fireplace' (0), 'Office' (0), 'Theater/Media Room' (empty dropdown), and 'Pet Restrictions' (empty dropdown). The 'EditComboValues' dialog box is open, showing a list of values: 01 - Old Town, 02 - Lower Deer Valley, 03 - Deer Crest, and 04 - Upper Deer Valley. It also has a 'New Value' field, 'Add New Value', 'Remove Selected', 'Cancel', and 'Done' buttons.

3. PHOTOS AND TOURS TAB

To upload a photo, click on the browse button under the image. This will pop-up a file selection window. Navigate to the windows folder containing your image, select it, and press Open. Future releases of the Real Estate Client Management application will use the information of this tab to create flyers and other documents.

The screenshot shows the RECMListings application window. The title bar reads "John Smith 123 Main St - RECMListings". The menu bar includes RECMListings, Insert, Format Text, and Developer. The toolbar contains various icons for actions like Save & New, Delete, Property Information, Listing Agreement, Offer, Contacts, Web Page, Map, Call, Business Card, Picture, Categorize, Follow Up, Private, Address Book, Check Names, Spelling, and Proofing. Below the toolbar, there are input fields for Client (John Smith), Transaction Name (123 Main St), and a checkbox for Use Street Address. The main area is divided into two tabs: Property Details and Photos And Tours. The Photos And Tours tab is active, showing a grid of 10 image placeholders labeled Image 1 through Image 10. Each placeholder has a "Browse" button and a "Delete" button below it. At the bottom of the tab, there are three input fields for links: Property Website Link, Virtual Tour Link, and Video Tour. Each link field has a "Browse" button. A note at the bottom states: "(Note: You can open the property website, virtual tour, or video tour in Internet Explorer. Then copy the link and paste it into the appropriate box.)"

Client: John Smith Select Client Transaction Name: 123 Main St ☒ Use Street Address

Property Details Photos And Tours

Image 1 Image 2 Image 3 Image 4 Image 5

Image 6 Image 7 Image 8 Image 9 Image 10

Property Website Link (Enter Link starting with http://) Virtual Tour Link (Enter Link starting with http://) Video Tour (Enter YouTube link starting with http://)

<http://www.RealEstateClientManagement.cc> Browse Browse pr1=0x006699&color2=0x54abd6&border=1 Browse

(Note: You can open the property website, virtual tour, or video tour in Internet Explorer. Then copy the link and paste it into the appropriate box.)

At the bottom of the Photos and Tours tab, you can enter the web links to your Property Website, Virtual Tour, and YouTube Video Tour. After entering the link, you can click on the "Browse" button to open the link in Internet Explorer (or your default browser if you use a different one).

LISTING AGREEMENT PAGE

The Listing Agreement tab allows you to track critical details of your listing from a Checklist of items to consider when you first take the listing to tracking which documents you have on file. We've also included a tool to estimate your commission.

The screenshot shows the 'Listing Agreement' tab in the RECMListings application. The title bar indicates the address 'John Smith 123 Main St - RECMListings'. The interface is divided into several sections:

- Commissions and Fees:** A table showing calculated commissions based on a list price of \$23,940.00.

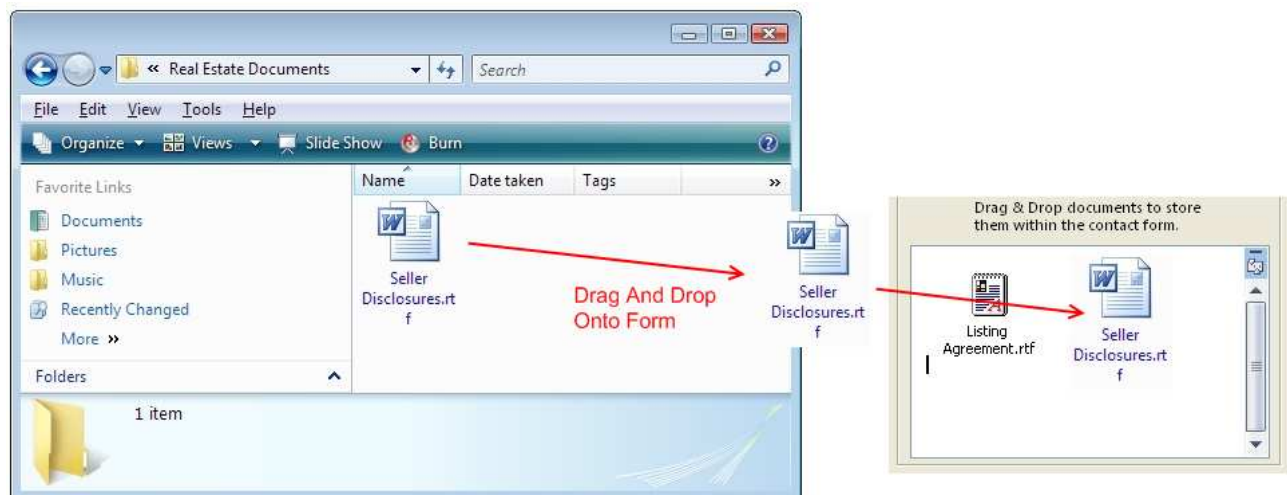
Commission Type	Rate	Amount
Seller Agent Commission	3%	\$23,940.00
Buyer Agent Commission	3%	\$23,940.00
Total Commission	6%	\$47,880.00
Referral Fee *	0%	\$0.00
Buyer Agent Bonus		\$0.00

Est. How Much You Will Earn

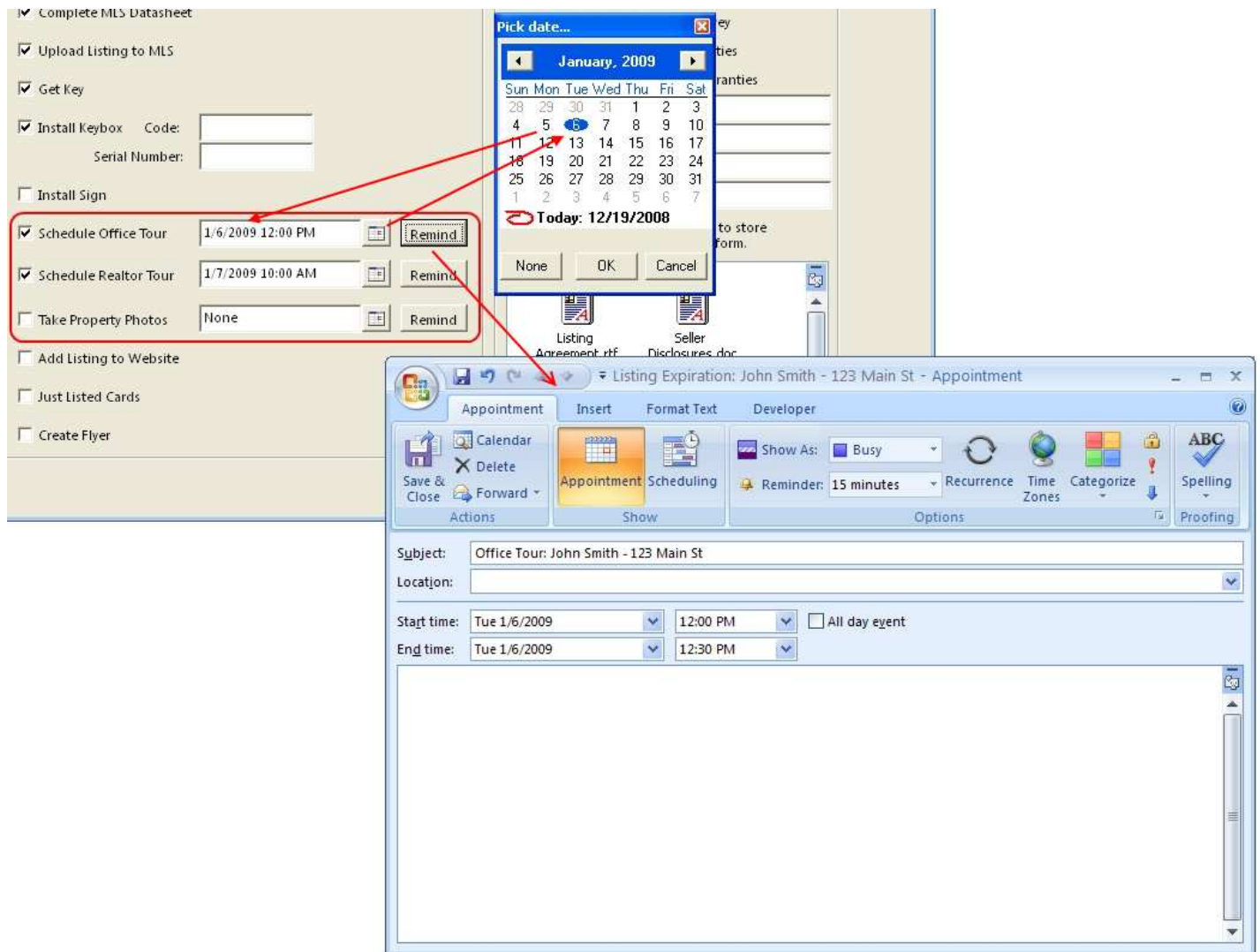
Fee Type	Rate	Amount
Office Fee (Split) *	20%	\$4,788.00
Franchise Fee *	6%	\$1,436.40
Other Fees (%) *	0%	\$0.00
Other Fees (\$)		\$0.00
Total Est. Earning		\$17,715.60

* Computed as percentage of Seller Agent Commission
- Checklist:** A list of items to be completed, with checkboxes for 'Signed Listing Contract', 'Signed Agency Agreement', 'Signed Seller Disclosures', 'Complete MLS Datasheet', 'Upload Listing to MLS', 'Get Key', 'Install Keybox', 'Schedule Office Tour', 'Schedule Realtor Tour', 'Take Property Photos', 'Add Listing to Website', 'Just Listed Cards', and 'Create Flyer'. Some items have associated dates and times.
- Documents On File:** A list of documents to be uploaded, including 'Listing Agreement', 'Agency Agreement', 'MLS Datasheet', 'Seller Disclosures', '1031 Exchange', 'Appraisal', 'Asbestos Inspection', 'CC&Bs', 'Financials', 'Flood Plain', 'Greenbelt', 'HOA Minutes', 'House/Floor Plans', 'Lead Based Paint', 'Mold Inspection', 'Permits', 'Peculation Test', 'Property Inventory', 'Plat Map', 'Preliminary Title Rpt', 'Radon Test', 'Rental/Lease Agree', 'Rental Revenue', 'Survey', 'Utilities', and 'Warranties'. A note at the bottom says 'Drag & Drop documents to store them within the contact form.' Below this is a visual representation of the document storage area with icons for 'Listing Agreement.rtf' and 'Seller Disclosures.doc'.

You can also store critical documents within the associated transaction. Simply drag and drop the document from a windows folder or from an email into the document storage area. No more searching for documents ... the critical ones are now stored within the Listing form.



When you take the listing, you normally will schedule for the listing to be on your Office and Local Realtor Tours and to take the Property Photos. You can schedule the date and time for the tour. To set the date and time, can just manually enter them. You can also set the date by clicking the calendar icon which will bring up the Date Picker ... choose the date and select "OK". Then set a Reminder/Appointment by clicking on the "Remind" button. This will create



Offer Page

The Offer Tab contains critical information on any offers you receive on the property. If the offer falls through, you can clear all the information, including reminder appointments by clicking the “Clear Offer” button on the upper right side of the page. You also have the ability to set dates and reminders for critical deadlines.

John Smith 123 Main St - RECMListings

RECMListings Insert Format Text Developer

Save & New Save & Close Delete Listing Agreement Offer Property Information Show Call Web Page Map Business Card Picture Categorize Follow Up Private Address Book Check Names Spelling Proofing

Offered Purchase Price \$798,000.00 ☒ Offer Accepted Clear Offer

Offer Amounts		Purchase Contingencies		Contract Deadlines	
Earnest Money	\$7,000.00	<input type="checkbox"/> Purchase Contingent on Appraisal		Seller Response Deadline	12/19/2008 Remind
Loan Amount	\$755,000.00	<input type="checkbox"/> Purchase Contingent on Financing	Financing Type None	Earnest Money Deposit	12/22/2008 Remind
Cash	\$16,000.00	Terms		Attorney Review	12/25/2008 Remind
Seller Financing	\$0.00	<input type="checkbox"/> Buyer Approval of Seller Disclosures		Seller Disclosures To Buyer	12/25/2008 Remind
Other	\$0.00	<input type="checkbox"/> Buyer Approval of Physical Property Condition		Inspections Deadline	1/16/2009 Remind
Total	\$778,000.00	<input type="checkbox"/> Ability to Obtain Home Owners Insurance		Appraisal Deadline	1/16/2009 Remind
Seller Paid Closing Costs	\$0.00			Loan Denial Deadline	1/28/2009 Remind

Seller Concessions

Includes the following:

Excludes the following:

Contacts Page

The Contacts page gives you the ability to associate other people that are critical to the success of the transaction – from the Buyer’s Agent to the Attorney to the Inspector to other critical people.

	Name	Company	Cell	Work	Open	Appointment
Buyer's Agent	Lookup				Open	Appointment
Attorney	Lookup				Open	Appointment
Appraiser	Lookup				Open	Appointment
HOA Contact	Lookup				Open	Appointment
Rental Company	Lookup				Open	Appointment
Pest Inspector	Lookup				Open	Appointment
Property Inspector	Lookup				Open	Appointment
Property Mgt Company	Lookup				Open	Appointment
Referring Agent	Lookup				Open	Appointment
Title/Escrow Officer	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment
Tenant/Occupant	Lookup				Open	Appointment

To associate a contact click the “Lookup” button. Select the contact and double click it with your left mouse button. Now the person is associated with this transaction.

Full Name	Company	Mobile Phone	Business Phone
Robert West	Florida Property Insp...	(935) 555-7345	(935) 555-8736
Bill Williams	Dewie, Cheatum, an...		(935) 555-3910

Double Click the Name with Left Mouse Button

To open the contact's Contact Form, click the "Open" button. This is useful if you need to send an email to the contact.

The screenshot shows a software interface with a contact list on the left and a detailed contact form on the right. The contact list includes fields for Pest Inspector, Property Inspector, Property Mgt Company, Referring Agent, Title/Escrow Officer, and Tenant/Occupant, each with a 'Lookup' button. The 'Property Inspector' row is highlighted, showing 'Robert West' and 'Florida Property Inspectors'. The 'Open' button for this row is circled in red. The detailed contact form for 'Robert West' is open, showing fields for Full Name, Company, Job title, File as, Internet (E-mail, Display as, Web page address, IM address), Phone numbers (Business, Home, Business Fax, Mobile), and Addresses (Business). The 'Appointment' button is also visible in the top right corner of the contact form.

You can also set an appointment with the contact (e.g. the Property Inspector) by clicking the appointment button.

The screenshot shows the same software interface as the previous one, but with the 'Appointment' button for the 'Property Inspector' row circled in red. The appointment form for 'Property Inspector Robert West' is open, showing fields for Subject, Location, Start time, End time, and a checkbox for 'All day event'. The 'Appointment' button is also visible in the top right corner of the appointment form.

PURCHASE FORM

Forms for each Buyer Purchase transaction are kept in the Purchase folder. We strongly suggest that you only create Purchase Forms via the Client Form. This ensures that the each purchase transaction is properly associated with a specific client.

There are four main pages on the Listing Form: 1)Requirements; 2) Candidate Properties; 3) Offer; and 4) Contacts. This guide will give a quick overview of each.

REQUIREMENTS PAGE

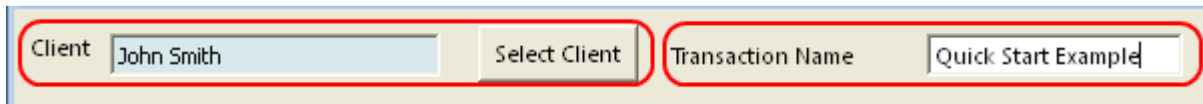
The screenshot displays the RECOMPurchase software interface, titled "John Smith Quick Start Example - RECOMPurchase". The interface includes a menu bar with "RECOMPurchase", "Insert", "Format Text", and "Developer". Below the menu bar is a toolbar with various icons for actions like "Save & New", "Delete", "Requirements", "Candidate Properties", "Offer", "Contacts", "Call", "Web Page", "Map", "Business Card", "Picture", "Categorize", "Follow Up", "Private", "Address Book", "Check Names", "Spelling", and "Proofing".

The main form area is divided into several sections:

- Client:** A dropdown menu showing "John Smith" and a "Select Client" button.
- Transaction Name:** A text field containing "Quick Start Example".
- Status:** A dropdown menu showing "Requirements Definition".
- Description of Requirements:** A text area containing the following text: "Would like the home to be within 20 minutes drive of the Technology Center (123 Technology Ave) and within 10 minutes of the Country Club and Golf Course. Wants a real sense of privacy ... woods, doesn't want his neighbors watching him entertain or grill in his back yard. Would like the community to be gated and with folks who can afford an affluent life style. Wants space to store the toys in a separate building/garage ... Large sailboat and water skies."
- Timeframe:** A dropdown menu showing "Immediately".
- Price Min/Max:** Two text fields showing "\$1,500,000.00" and "\$2,500,000.00".
- Bedroom:** A dropdown menu showing "4 or More".
- City/State:** Two dropdown menus showing "Sunny" and "FL".
- Sq Ft Min/Max:** Two text fields showing "0" and "0".
- Bath:** A dropdown menu showing "6 or More".
- Area:** A dropdown menu showing "01 - Old Town".
- Type:** A dropdown menu showing "Single Family".
- Garage:** A dropdown menu showing "4 or More".
- Lot Size:** A dropdown menu showing "1" and "Acre".
- Style:** A dropdown menu showing an empty field.
- Age:** A dropdown menu showing "1 to 5 Years Old".
- Interior Features:** A list of checkboxes including "Air Conditioning", "Formal Dining", "Family Room", "Fireplace", "Main Floor Master", "Den/Office", and "2nd Detached 6 Car Garage".
- Exterior Features:** A list of checkboxes including "Pool", "Spa/Hot Tub", "Log Construction", "Brick Construction", "Metal Roof", "Barn/Horse Facilities", and "2nd Detached 6 Car Garage".
- Lot Features:** A list of checkboxes including "Corner Lot", "Golf Course Lot", "Cul-de-sac Lot", "Level Lot", "Wooded", and "View: []".
- Community Amenities:** A list of checkboxes including "Club House", "Pool", "Tennis", "Golf", "Gated Community", and "School []".

1. CLIENT TO PURCHASE FORM RELATIONSHIP

At the top of the Requirements Page there are two critical fields: Client and Transaction Name. These two fields are combined (<client name> <transaction name>) to create a unique name for the transaction. In this case the Purchase Form would be named: “John Smith Quick Start Example”.



The screenshot shows a form with two main input areas. On the left, there is a text box labeled 'Client' containing the text 'John Smith', followed by a button labeled 'Select Client'. On the right, there is a text box labeled 'Transaction Name' containing the text 'Quick Start Example'. Both the text boxes and the button are enclosed in a red rectangular border.

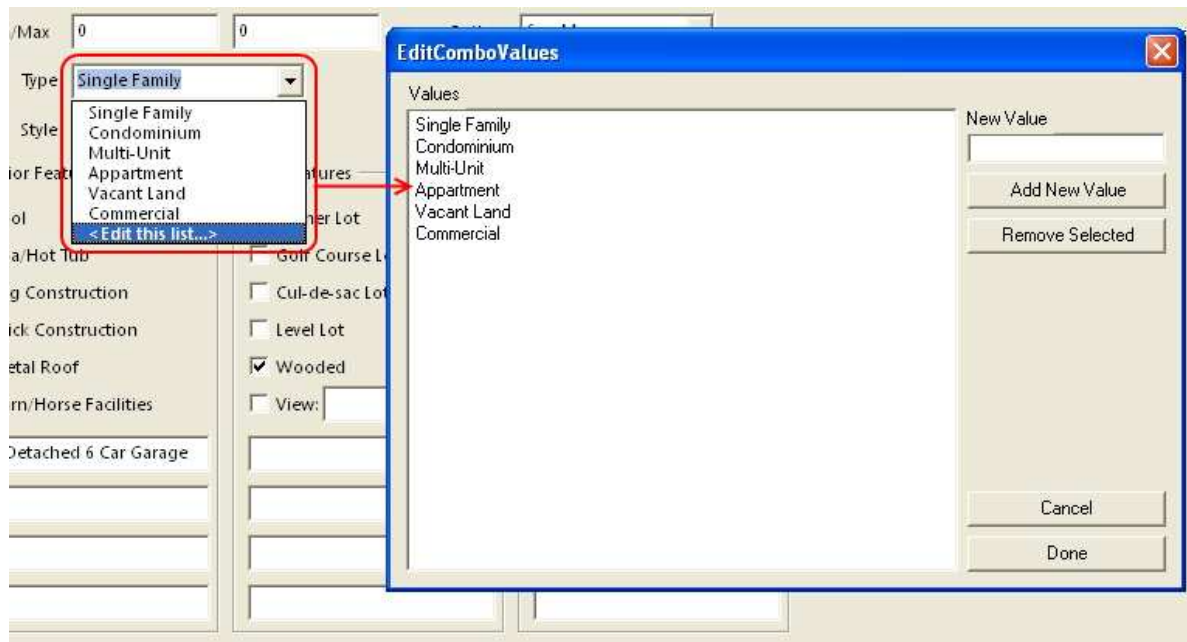
The Purchase Form is associated back to the client by the client name. If you create the Purchase form from the “New Purchase” button in the Client Form, then the Client’s Name is automatically filled in for you and a relationship established between that client and this purchase transaction. If you choose to create the purchase form another way (e.g. double clicking from within the purchase folder) then you’ll need to click the “Select Client” button and choose a buyer client to associate the purchase with.

When you initially create the Purchase Form, the Transaction Name is blank. You’ll need to enter a Transaction Name of your choice before you can save the form.

2. Requirements Page Fields

None the remaining fields on the Page are required ... so, you can decide whether to fill them in or not.

Some the fields are editable (Area, Type, and Single Family). If you enter information into these fields, the information becomes available for every form that uses that field. To edit a field, click the drop down, then click “<Edit this list...>”. This will bring up a window where you can add new values to the drop down list.



The screenshot shows a portion of the Requirements Page. The 'Type' dropdown menu is open, showing a list of options: Single Family, Condominium, Multi-Unit, Apartment, Vacant Land, and Commercial. The '<Edit this list...>' option is highlighted at the bottom. A red arrow points from this option to the 'EditComboValues' dialog box. The dialog box has a title bar 'EditComboValues' and a list of 'Values' containing the same options as the dropdown. To the right of the list is a 'New Value' text box and buttons for 'Add New Value', 'Remove Selected', 'Cancel', and 'Done'.

The Candidate Properties Page is a very powerful tool for helping you keep track of properties you plan to show your clients and their thoughts on the property. As the saying goes ... We forget the details, but the computer never does.

[illegible]

-
- Address... 345 Lake View Dr
Sunny, FL
- Add**
- At least the street address is required to add a new Candidate Property.
- Candidate Properties
- | Street Address | MLSID |
|----------------|-------|
| | |
| | |
| | |
| | |
| | |
- Browse Con
- Open selected property in Internet Explorer
- Address...
- Add**
- At least the street address is required to add a new Candidate Property.
- Candidate Properties
- | Street Address | MLSID |
|------------------|-------|
| 345 Lake View Dr | |
| | |
| | |
| | |
| | |

2. Once you've added the property, you can log the information on the property. Click the "Save Log" to save the information. Notice that if you enter an MLS ID, that ID is place next to Candidate Property address. If there is an MLS ID, you can press the "Browse" button to open the property on Realtor.com. If want to change so property is shown on a different website (e.g. if you know how to configure access to your MLS), then click the "Config MLS URL" and enter the access URL. The URL for Realtor.com is:

<http://www.realtor.com/search/searchresults.aspx?mlsId={0}>

[illegible]

3. To setup a showing appointment, press the CNTRL key while clicking on the properties you want to setup a showing appointment for. This will create an appointment. Notice that the appointment includes the properties you selected in the notes area. If you've entered an MLS ID, then the link to the property on Realtor.com is embedded – clicking on it will open the property on Realtor.com in Internet Explorer.

The screenshot displays the MLS interface. On the left, the 'Candidate Properties' table lists two properties: '598 Swamp Road' with MLSID '84736' and '345 Lake View Dr' with MLSID '99999'. The 'Appointment' window is open, showing details for an appointment with John Smith. The 'Showing Appointment' button is highlighted with a red box, and a red arrow points from it to the MLS ID '84736' in the appointment details. The appointment details include the subject 'John Smith - Quick Start Example Showings', location '598 Swap Road, Sunny, FL', start time 'Sat 12/20/2008 12:00 PM', and end time 'Sat 12/20/2008 2:00 PM'. The appointment is categorized as 'Busy' with a 15-minute reminder.

Street Address	MLSID
598 Swamp Road	84736
345 Lake View Dr	99999

Appointment Details:

- Subject: John Smith - Quick Start Example Showings
- Location: 598 Swap Road, Sunny, FL
- Start time: Sat 12/20/2008 12:00 PM
- End time: Sat 12/20/2008 2:00 PM
- Showing As: Busy
- Reminder: 15 minutes

Notice that you can also “Invite Attendees” (Outlook 2007). In Outlook 2003, select File/Email. If you click that button, it will allow you to email your client the showing appointment.

John Smith - Quick Start Example Showings - Meeting

Meeting

Insert

Format Text

Calendar

Cancel Invitation

Forward

Delete

Appointment

Forward

Forward

Scheduling

Forward

Forward

Meeting Workspace

Forward

Forward

Attendees

Forward

Forward

Show As: Busy

Reminder: 15 minutes

Recurrence

Time Zones

Categorize

Spelling

Proofing

Invitations have not been sent for this meeting.

Conflicts with another appointment on your Calendar.

Send

Account

To...

Subject: John Smith - Quick Start Example Showings

Location:

Start time: Sat 12/20/2008 12:00 PM

End time: Sat 12/20/2008 2:00 PM

☐ All day event

84736

598 Swap Road, Sunny, FL

99999

345 Lake View Dr, Sunny, FL

Offer Page

The Offer Page allows you to track critical details on an offer your buyers are making on a property. Notice in the upper right corner there is a “Clear Offer” button. If their offer falls through, you can clear all the details of the offer including appointments by pressing this button.

John Smith Quick Start Example - RECMPurchase

RECMPurchase Insert Format Text Developer

Save & New Save & Close Delete Requirements Candidate Properties Offer Contacts Call Web Page Map Business Card Picture Categorize Follow Up Private Address Book Check Names Spelling Proofing

Offered Purchase Price \$1,650,000.00 % Off List 94.29% Offer Status Clear Offer

Property Details Contract Details

Address... 345 Lake View Dr Sunny, FL List Price \$1,750,000.00 Area 01 - Old Town Subdivision

General Details

MLS ID 99999 Tax ID LV-345 Taxes \$17,500.00 Tax Year 2008 Type Single Family

Sq Ft 5,000 SqFt Source Public Record Lot Size 1.50 Year Built 2004 Style

Garage 4 Car Additional Parking 6 Car HOA Dues \$400 Frequency Monthly

Room Details

Bedroom 5 Living Room 0 Fireplace 4 Attic No

Bath - Full 5 Family Room 1 Office 1 Theater/Media Room Yes

Bath - 3/4 0 Great Room 1 Study/Den 1 Fitness Center Yes

Bath - 1/2 2 Kitchen 1 Loft 0 Pool Yes

Bath - Total 7 Laundry 2

Other

☐ Tenant Occupied

☐ Nightly Rentals Allowed

☐ Pet Restrictions

☐ Assessment Amount: \$0.00 Purpose:

☐ Other Restrictions

Noted that at the top of the Page is information the offered price. If you’ve entered the List Price on the Property Details Tab, it also shows the difference between the offer and the list price.

1. PROPERTY DETAILS TAB

Allows you to keep track of the specifics of the property your Buyer has submitted an offer on. You can add as much or as little information as you deem necessary. But, would suggest filling out at least the property address and the List Price.

The screenshot shows the 'Property Details' tab with the following sections:

- Property Details:** Address (345 Lake View Dr, Sunny, FL), List Price (\$1,750,000.00), Area (01 - Old Town), Subdivision.
- General Details:** MLS ID (99999), Tax ID (LV-345), Taxes (\$17,500.00), Tax Year (2008), Type (Single Family), Sq Ft (5,000), Sq Ft Source (Public Record), Lot Size (1.50), Year Built (2004), Style, Garage (4 Car), Additional Parking (6 Car), HOA Dues (\$400), Frequency (Monthly).
- Room Details:** Bedroom (5), Living Room (0), Fireplace (4), Attic (No), Bath - Full (5), Family Room (1), Office (1), Theater/Media Room (Yes), Bath - 3/4 (0), Great Room (1), Study/Den (1), Fitness Center (Yes), Bath - 1/2 (2), Kitchen (1), Loft (0), Pool (Yes), Bath - Total (7), Laundry (2).
- Other:** Tenant Occupied, Nightly Rentals Allowed, Pet Restrictions, Assessment Amount (\$0.00), Purpose, Other Restrictions.

2. CONTRACT DETAILS TAB

The contract details tab allows you to keep track of critical details (including Seller Concessions and what will be included/excluded) and events associated with the offer. This includes setting dates and reminders for contract deadlines. To set a deadline, enter the date (or select it from the Calendar Date Picker) and the click the "Remind Button".

The screenshot shows the 'Contract Details' tab with the following sections:

- Offer Amounts:** Earnest Money (\$10,000.00), Loan Amount (\$840,000.00), Cash (\$800,000.00), Seller Financing (\$0.00), Other (\$0.00), Total (\$1,650,000.00), Seller Paid Closing Costs (\$0.00).
- Purchase Contingencies:** Purchase Contingent on Appraisal, Purchase Contingent on Financing, Financing Type (Conventional), Terms (6.5% Jumbo Loan), Buyer Approval of Seller Disclosures, Buyer Approval of Physical Property Condition, Ability to Obtain Home Owners Insurance.
- Contract Deadlines:** Seller Response Deadline (Saturday, December 20, 2008), Earnest Money Deposit (Wednesday, December 24, 2008), Attorney Review (Friday, December 26, 2008), Seller Disclosures To Buyer (Friday, December 26, 2008), Inspections Deadline (Friday, January 16, 2009), Appraisal Deadline (Friday, January 16, 2009), Loan Denial Deadline (Friday, January 16, 2009), Closing Deadline (Thursday, January 29, 2009).
- Seller Concessions:** Includes the following, Excludes the following.

CONTACTS PAGE

The Contacts page gives you the ability to associate other people that are critical to the success of the transaction – from the Seller’s Agent to the Attorney to the Inspector to other critical people.

	Name	Company	Cell	Work		
Seller's Agent	Lookup				Open	Appointment
Attorney	Lookup				Open	Appointment
Appraiser	Lookup				Open	Appointment
HOA Contact	Lookup				Open	Appointment
Rental Company	Lookup				Open	Appointment
Pest Inspector	Lookup				Open	Appointment
Property Inspector	Lookup				Open	Appointment
Property Mgt Company	Lookup				Open	Appointment
Referring Agent	Lookup				Open	Appointment
Title/Escrow Officer	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment
	Lookup				Open	Appointment

To associate a contact click the “Lookup” button. Select the contact and double click it with your left mouse button. Now the person is associated with this transaction.

Double Click the Name with Left Mouse Button

Full Name	Company	Mobile Phone	Business Phone
Robert West	Florida Property Insp...	(935) 555-7345	(935) 555-8736
Bill Williams	Dewie, Cheatum, an...		(935) 555-3910

Pest Inspector	Lookup				Open	Appointment	
Property Inspector	Lookup	Robert West	Florida Property Inspectors	(935) 555-7345	(935) 555-8736	Open	Appointment
Property Mgt Company	Lookup				Open	Appointment	

To open the contact's Contact Form, click the "Open" button. This is useful if you need to send an email to the contact.

The screenshot shows a software interface with a contact list on the left and a detailed contact form on the right. The contact list includes fields for Pest Inspector, Property Inspector, Property Mgt Company, Referring Agent, Title/Escrow Officer, and Tenant/Occupant, each with a "Lookup" button. The Property Inspector field is populated with "Robert West", "Florida Property Inspectors", "(935) 555-7345", and "(935) 555-8736". The "Open" button next to the Property Inspector field is highlighted with a red circle and a red arrow pointing to the contact form.

The contact form, titled "Robert West - Contact", has a menu bar with "Contact", "Insert", "Format Text", and "Developer". It features a toolbar with icons for "Save & New", "Delete", "General", "Details", "Certificates", "Activities", "Web Page", "Map", "Business Card", "Picture", "Categorize", "Follow Up", "Private", "Address Book", "Spelling", and "Proofing". The form fields include:

- Full Name: Robert West
- Company: Florida Property Inspectors
- Job title: Inspector
- File as: West, Robert
- Internet: E-mail: Robert.West@FloridaPropertyInspectors.com
- Display as: Robert West (Robert.West@FloridaPropertyInspectors.com)
- Web page address:
- IM address:
- Phone numbers: Business: (935) 555-8736, Home:, Business Fax:, Mobile: (935) 555-7345
- Addresses: Business: (This is the mailing address)

A summary box on the right displays the contact's name, company, job title, and contact information. A "Notes" section is at the bottom right.

You can also set an appointment with the contact (e.g. the Property Inspector) by clicking the appointment button.

The screenshot shows the same software interface as the previous one, but with the "Appointment" button next to the Property Inspector field highlighted with a red circle and a red arrow pointing to the appointment form.

The appointment form, titled "Property Inspector Robert West - Event", has a menu bar with "Event", "Insert", "Format Text", and "Developer". It features a toolbar with icons for "Calendar", "Appointment", "Scheduling", "Show As", "Reminder", "Recurrence", "Time Zones", "Categorize", "Spelling", and "Proofing". The form fields include:

- Subject: Property Inspector Robert West
- Location:
- Start time: Fri 12/19/2008, 12:00 AM
- End time: Fri 12/19/2008, 12:00 AM
- All day event: ☒

A "Notes" section is at the bottom right.