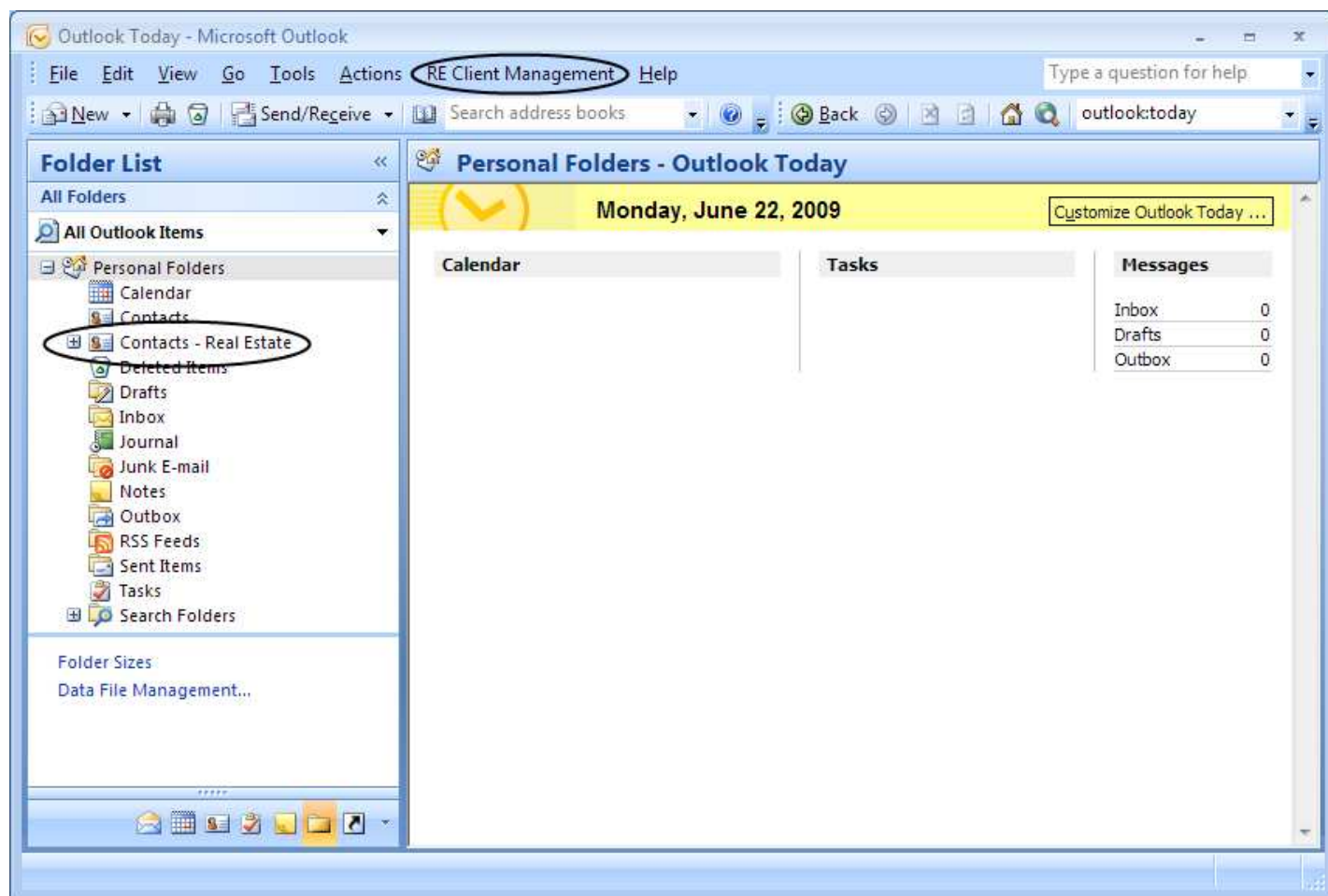


REAL ESTATE CLIENT MANAGEMENT QUICK START GUIDE

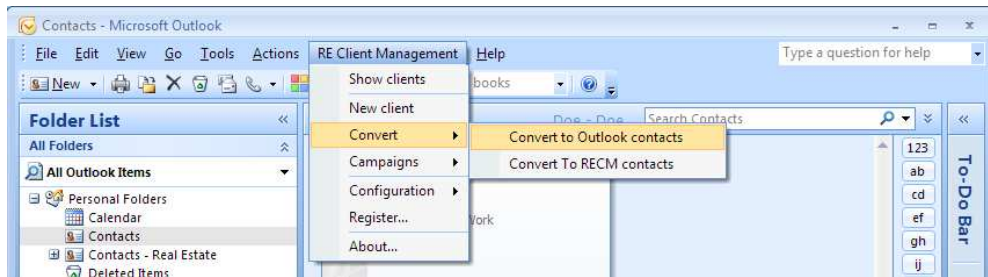
The purpose of the quick start guide is to help you get started using the Real Estate Client Management (RECM) product quickly. For a more in-depth quick start, watch the Overview Tutorial video at:

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'. The window has a menu bar (RECMClient, Insert, Format Text, Developer) and a toolbar with various icons. The main form is divided into several sections: 'Client Information' with fields for Full Name, Job Title, Company, Business, Home, Business Fax, Mobile, Spouse, Spouse Job Title, Spouse Company, Spouse Business Phone, Spouse Home Fax, Spouse Mobile Phone, and File As; 'Client Status' with radio buttons for Buyer, Seller, and Both Buyer And Seller, and dropdowns for Client Status, Probability, Reason, and Source; 'Client Follow-Up' with a Purpose dropdown, Date, Time, and Remind button; and 'Address' with a Home dropdown and a checkbox for 'This is the mailing address'. There are also buttons for 'New Listing' and 'New Purchase'.

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.

[illegible]

- 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.
 - c. Click on “Select All” at the bottom of the form to select all your contacts.
 - d. Click on “Select None” to clear all selections
 - e. Check “Delete contacts after conversion” to delete the old contacts after conversion.
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”.

Convert RECM contacts to Outlook contacts

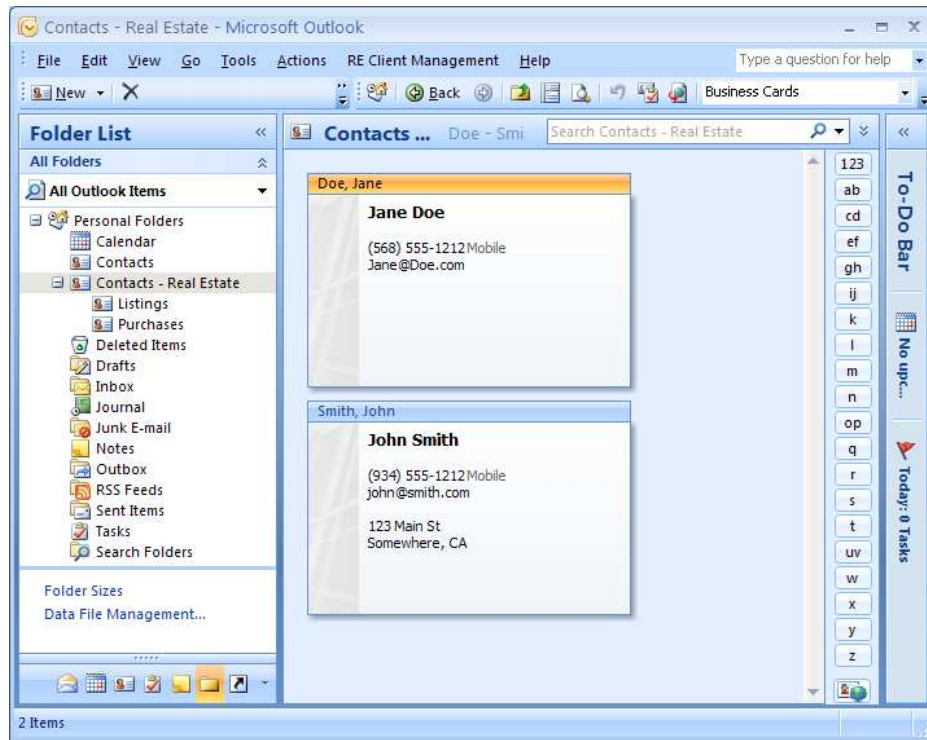
Full Name	Company	Mobile Phone	Business Phone
<input type="checkbox"/> John Doe		(301) 555-1315	

☐ Select None ☒ Select All ☐ Delete original contacts after conversion

- 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
 - c. Click on “Select All” at the bottom of the form to select all your contacts.
 - d. Click on “Select None” to clear all selections
 - e. Check “Delete contacts after conversion” to delete the old contacts after conversion.
5. **Campaigns.** This allows you to create Campaigns Templates such as Action Plans or Drip email that you can apply to clients. Each campaign can consist of emails, appointments, and tasks. You also have the ability to import campaign templates that we’ll put on the website. We’ll cover this in more detail in a later section.

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).



- a. 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.
- b. To open an existing Client contact, just double click on the contact.

Client Form

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 (click on the button). Will discuss these forms in the next sections.

3. Tabs

- a. **Client Details.** This tab contains client details such as their mailing addresses (home, business, etc.) and client and spouse email. You can also set client follow up appointments and log client conversations/events (click the Time Stamp button to time stamp the conversation/event). At the bottom of the form you can also associate specific contacts with the client and set categories (e.g. buyer, seller).

- b. **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.

Name	Birthday	Notes
	None	
	None	
	None	
	None	
	None	

- c. **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.

Client Details Family Details Listings Purchases Campaigns		
Listings (Double Click Listing to Open)		
Status	Transaction Name	Street Address
Active	123 Main St	

- d. **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]

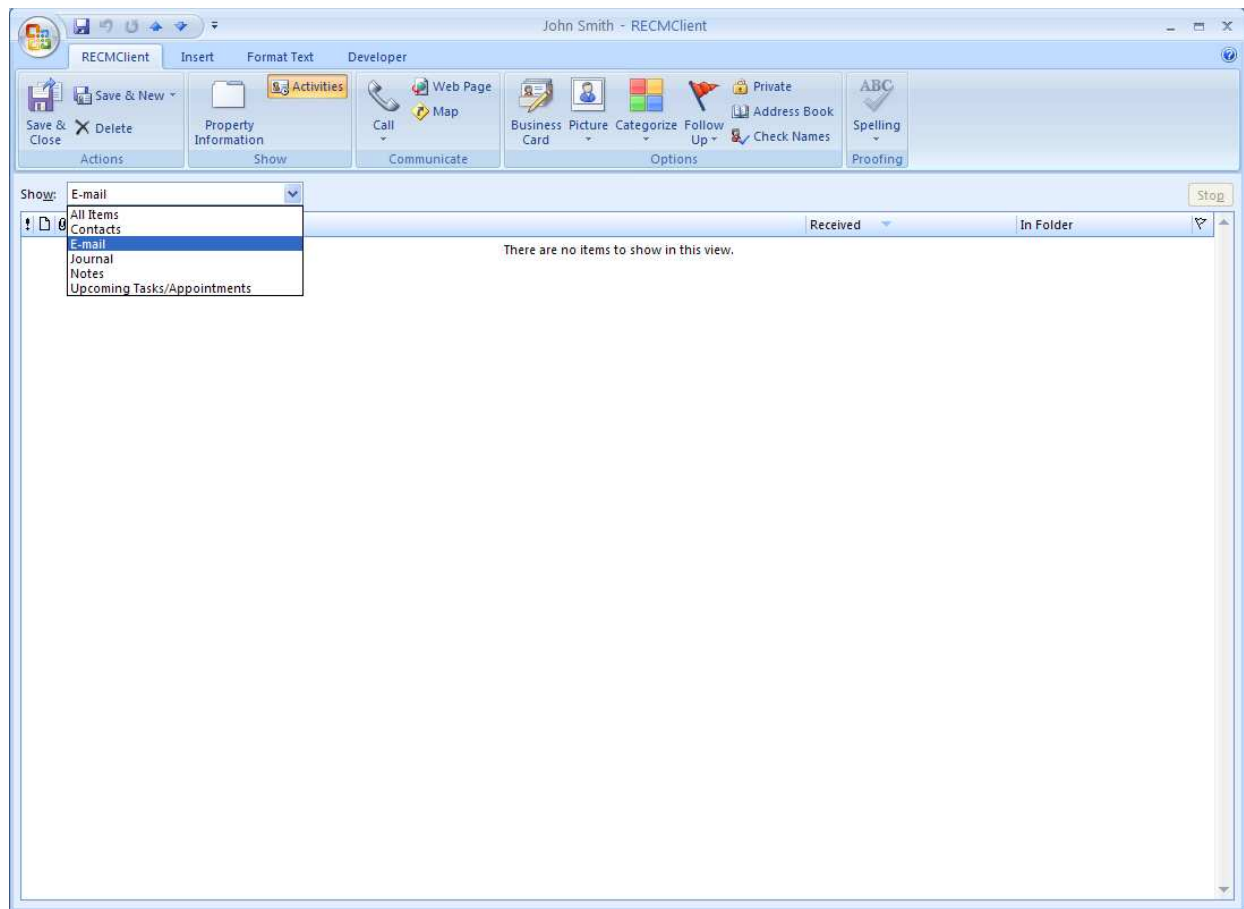
- e. Campaigns. This tab allows you to apply campaigns templates that you have created or imported to an individual client. Campaign templates will be covered in a later section, including the usage of this tab. But, as a quick explanation, campaigns are a series of customized emails, appointments, and/or tasks that you set to execute on a specific number of days after you apply the campaign to the client (e.g. send customized email on 10 days after applying to client).

In the left box are the available campaigns. The right box shows the campaigns you have applied to the client.

[illegible]

- i. **Add campaign.** Apply a campaign by selecting the campaign in the box on the left and then click the Add button. Once you've applied the campaign, the customized events (emails, appointments, tasks) are created for that client.
- ii. **Remove campaign.** To remove a campaign, select the campaign you wish to remove from the box on the left and click the remove button. Any future events (emails, appointments, tasks) will be deleted.

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 'Property Information' tab of a listing form. At the top, the 'Client' field is populated with 'John Smith' and the 'Transaction Name' field is populated with '123 Main St'. A red box highlights these two fields, and a red arrow points from the 'Transaction Name' field to the 'Address' field, which also contains '123 Main St Somewhere, CA'. The 'Use Client's Home Address' checkbox is checked. Other fields include Status (Active), List Price (\$798,000), List Date (18 December, 2008), Area, Original Price (\$0), Expiration Date (21 June, 2009), Subdivision, Sale Price (\$0), and Sale Date (None). A 'Remind' button is also visible.

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 displays the RECMListings software interface. At the top, the title bar reads "John Smith 123 Main St - RECMListings". Below it is a menu bar with "RECMListings", "Insert", "Format Text", and "Developer". A 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".

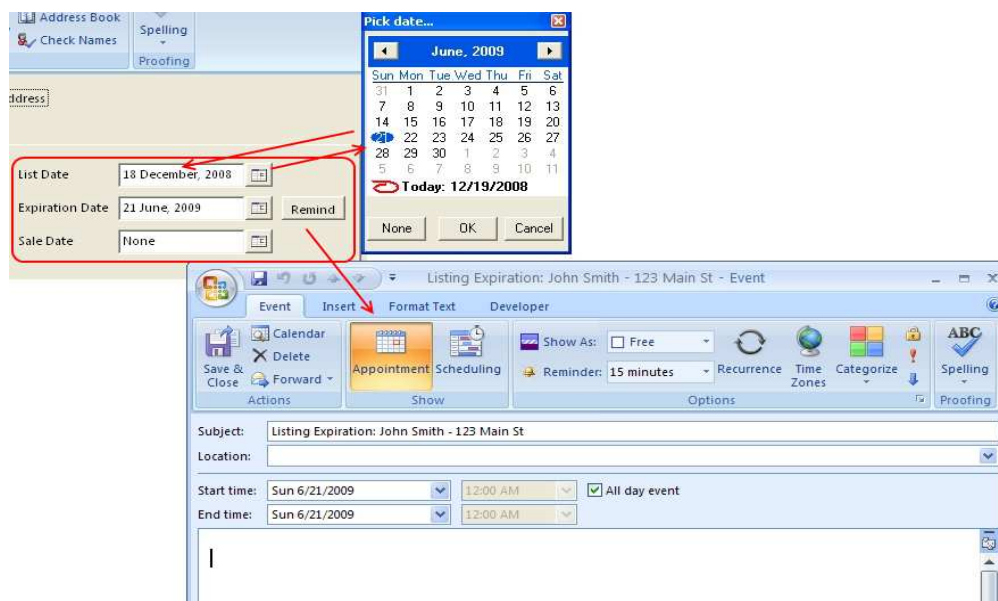
The main form area is divided into sections. The "Client" section shows "John Smith" and a "Select Client" button. The "Transaction Name" is "123 Main St", and the "Use Street Address" checkbox is checked. The "Property Details" tab is active, showing a list of fields: "Address" (123 Main St, Somewhere, CA), "Status" (Active), "List Price" (\$798,000), "List Date" (18 December, 2008), "Area", "Original Price" (\$0), "Expiration Date" (21 June, 2009), "Subdivision", "Sale Price" (\$0), and "Sale Date" (None). A "Remind" button is next to the expiration date. A checkbox "Use Client's Home Address" is checked.

The "General Details" section includes fields for "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), and "Frequency" (Not Applicable).

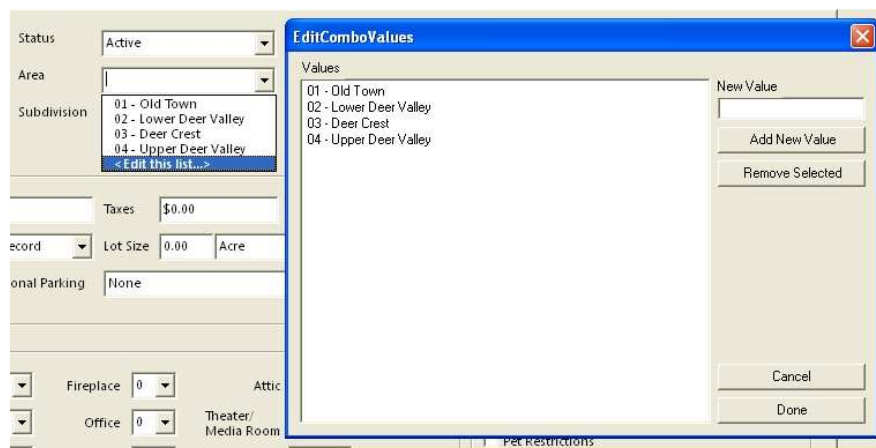
The "Room Details" section contains dropdown menus for "Bedroom" (0), "Living Room" (0), "Fireplace" (0), "Attic" (No), "Bath - Full" (0), "Family Room" (0), "Office" (0), "Theater/Media Room" (No), "Bath - 3/4" (0), "Great Room" (0), "Study/Den" (0), "Fitness Center" (No), "Bath - 1/2" (0), "Kitchen" (0), "Loft" (0), "Pool" (No), "Bath - Total" (0), and "Laundry" (0).

The "Other" section has checkboxes for "Tenant Occupied", "Nightly Rentals Allowed", and "Pet Restrictions". It also includes an "Assessment" section with "Amount" (\$0.00) and "Purpose" (empty), and an "Other Restrictions" section with an empty text box.

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).

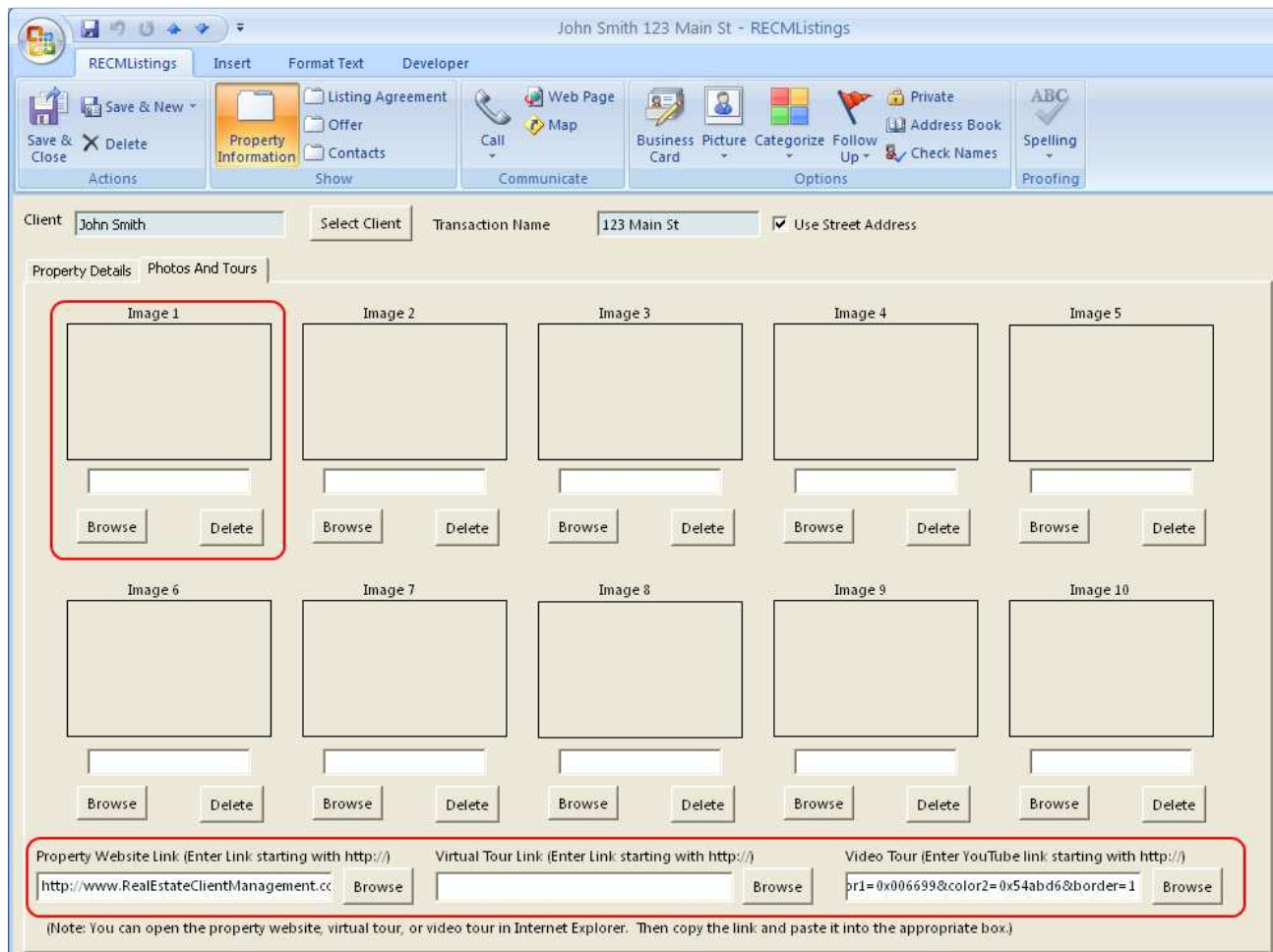


You can also edit the values for many of the dropdown fields. These changes will be available for all forms. So in the example below, the “Area” dropdown was edited. If you open the “Area” field on the Purchase Form, the values you input here would be available there. We recommend that you take a few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



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.



John Smith 123 Main St - RECMListings

RECMListings Insert Format Text Developer

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 Proofing

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 Virtual Tour Link Video Tour Link

(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.

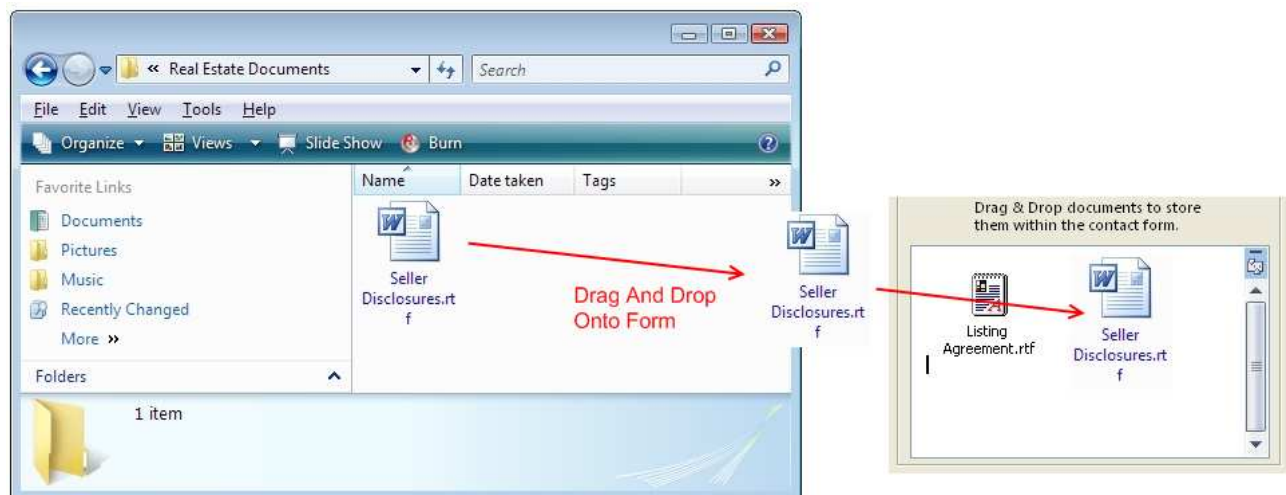
Commission Type	Rate	Amount
Seller Agent Commission	3%	\$23,940.00
Buyer Agent Commission	3%	\$23,940.00
Total Commission	6%	\$47,880.00
Referral Fee *	0%	\$0.00
Buyer Agent Bonus		\$0.00

Est. How Much You Will Earn

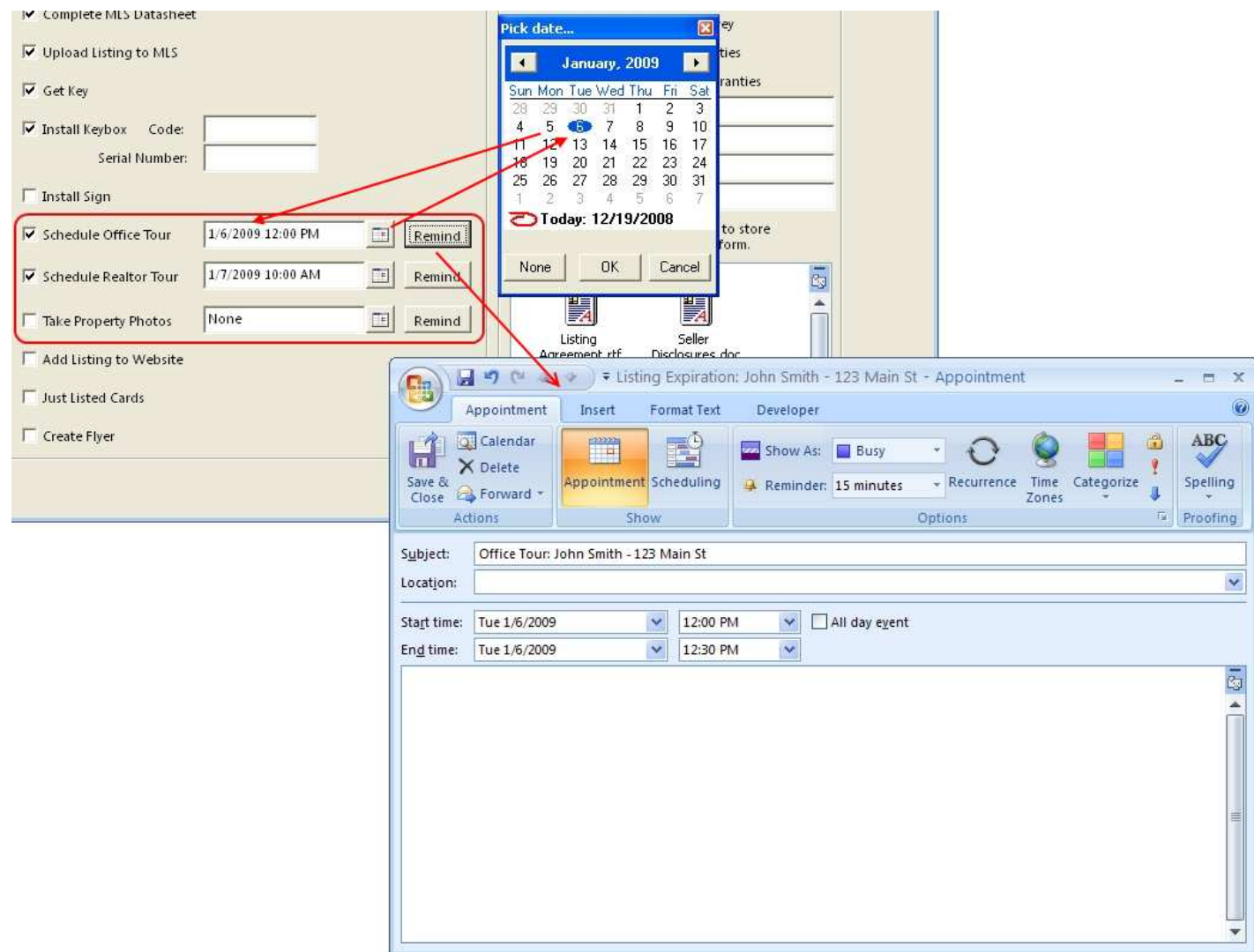
Fee Type	Rate	Amount
Office Fee (Split) *	20%	\$4,788.00
Franchise Fee *	6%	\$1,436.40
Other Fees (%) *	0%	\$0.00
Other Fees (\$)		\$0.00
Total Est. Earning		\$17,715.60

* Computed as percentage of Seller Agent Commission
- Checklist:** A list of items to be completed, including '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 dates and times entered, and others have 'Remind' buttons.
- 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 'Drag & Drop documents to store them within the contact form.' instruction is provided.
- Special Terms and Restrictions:** A section for additional terms, including 'Keybox Not Allowed', 'Yard Sign Not Allowed', 'Open House Not Allowed', 'Agent Present for All Showings', and 'Special Terms and Instructions'.

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 X 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:

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.

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.

©2009 RealEstateClientManagement.com

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 detailed contact form for 'Robert West' includes 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). A red arrow points to the 'Open' button in the top right corner of the contact list.

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 highlighted in the top right corner of the contact list. The detailed event form for 'Property Inspector Robert West' is open, showing fields for Subject, Location, Start time, End time, and a checkbox for 'All day event'. A red arrow points to the 'Appointment' button in the top right corner of the contact list.

PURCHASE FORM

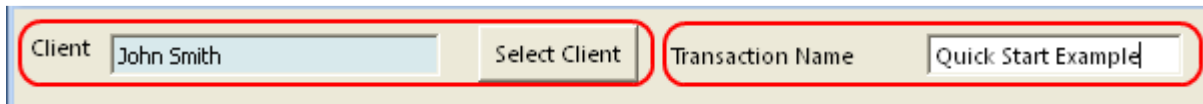
Forms for each Buyer Purchase transaction are kept in the Purchase folder. We strongly suggest that you only create Purchase Forms via the Client Form. This ensures that the each purchase transaction is properly associated with a specific client.

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

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 'Client' label followed by a text box containing 'John Smith' and a 'Select Client' button. On the right, there is a 'Transaction Name' label followed by a text box containing 'Quick Start Example'. Both the text boxes and the 'Select Client' button are enclosed in a red rectangular border.

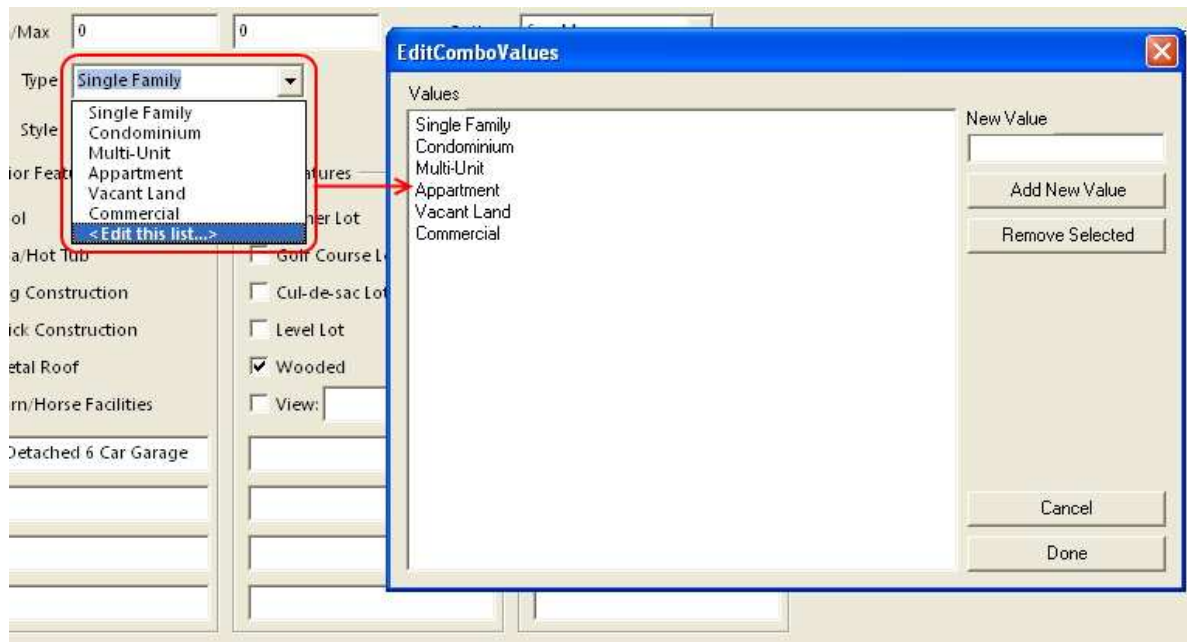
The Purchase Form is associated back to the client by the client name. If you create the Purchase form from the “New Purchase” button in the Client Form, then the Client’s Name is automatically filled in for you and a relationship established between that client and this purchase transaction. If you 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. 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]

-
- The screenshot shows the 'Candidate Properties' form. At the top, there is a text input field for 'Address...' containing '345 Lake View Dr Sunny, FL'. To its right is a red-bordered 'Add' button. Below the 'Add' button, a red arrow points to the 'Street Address' field in the table below. The table has two columns: 'Street Address' and 'MLSID'. The first row of the table contains the text '345 Lake View Dr' in the 'Street Address' column. Below the table, there is a 'Browse' button and a 'Confirm' button. A red arrow points from the 'Add' button to the 'Street Address' field in the table.
- 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 |
|------------------|-------|
| 345 Lake View Dr | |
- Browse Confirm
- Open selected property in Internet Explorer

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 placed 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 you 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?mlsld={0}>

At least one street address is required to add a new Candidate Property.

Street Address	MLSID
3345 Lake Dr	999999

Browse

Open selected property in Internet Explorer

Remove

Delete selected properties

Showing Appointment

To select multiple properties to show, press the CTRL key while clicking on each MLS ID

Candidate Property Log

Address: 3345 Lake Dr Sunny, FL

MLS ID: 999999

List Price: \$980,000 Ranking: Top Property

Features: heavily wooded lot on the lake

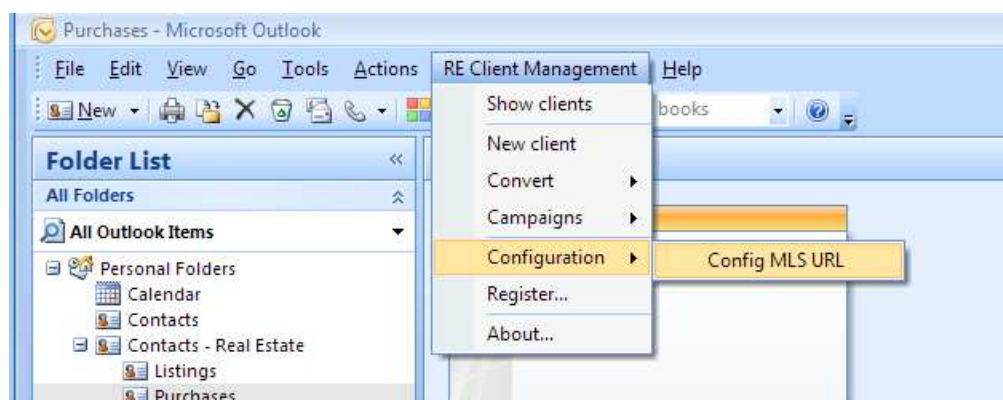
Likes: Kitchen and water access

Dislikes: 25 Minutes to work

Your Thoughts: they really liked this one

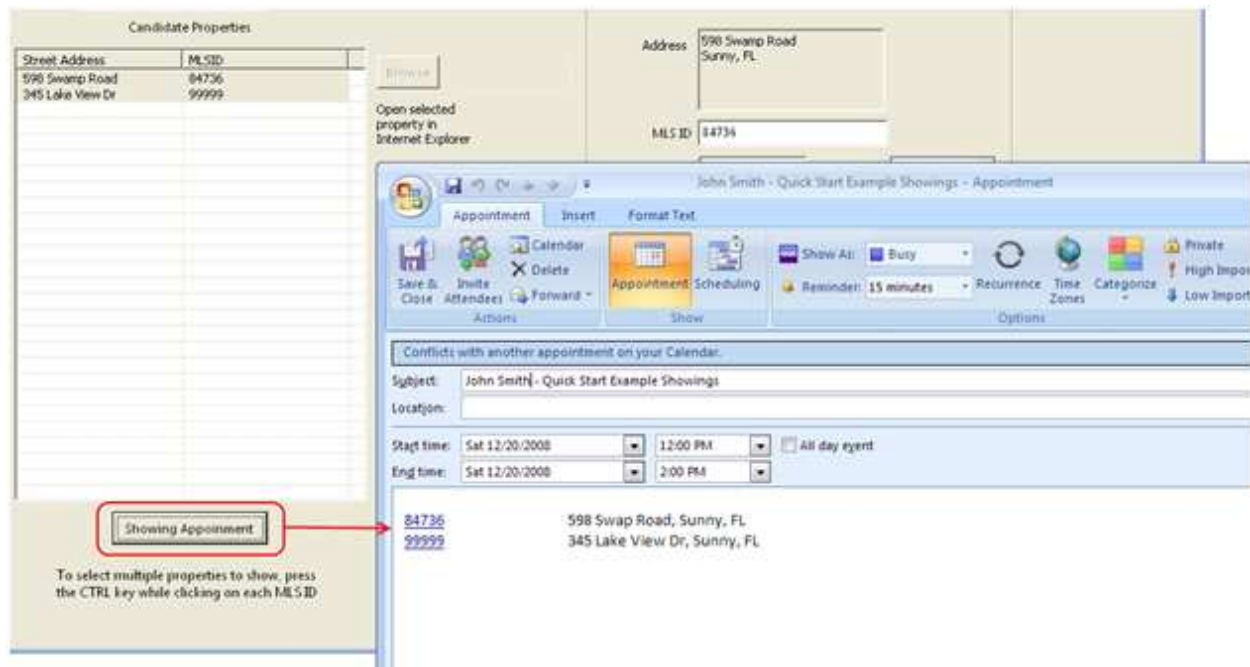
Save Log

If you 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" under RE Client Management on the main Outlook toolbar and enter the access URL. The URL for Realtor.com is: <http://www.realtor.com/search/searchresults.aspx?mlsld={0}>

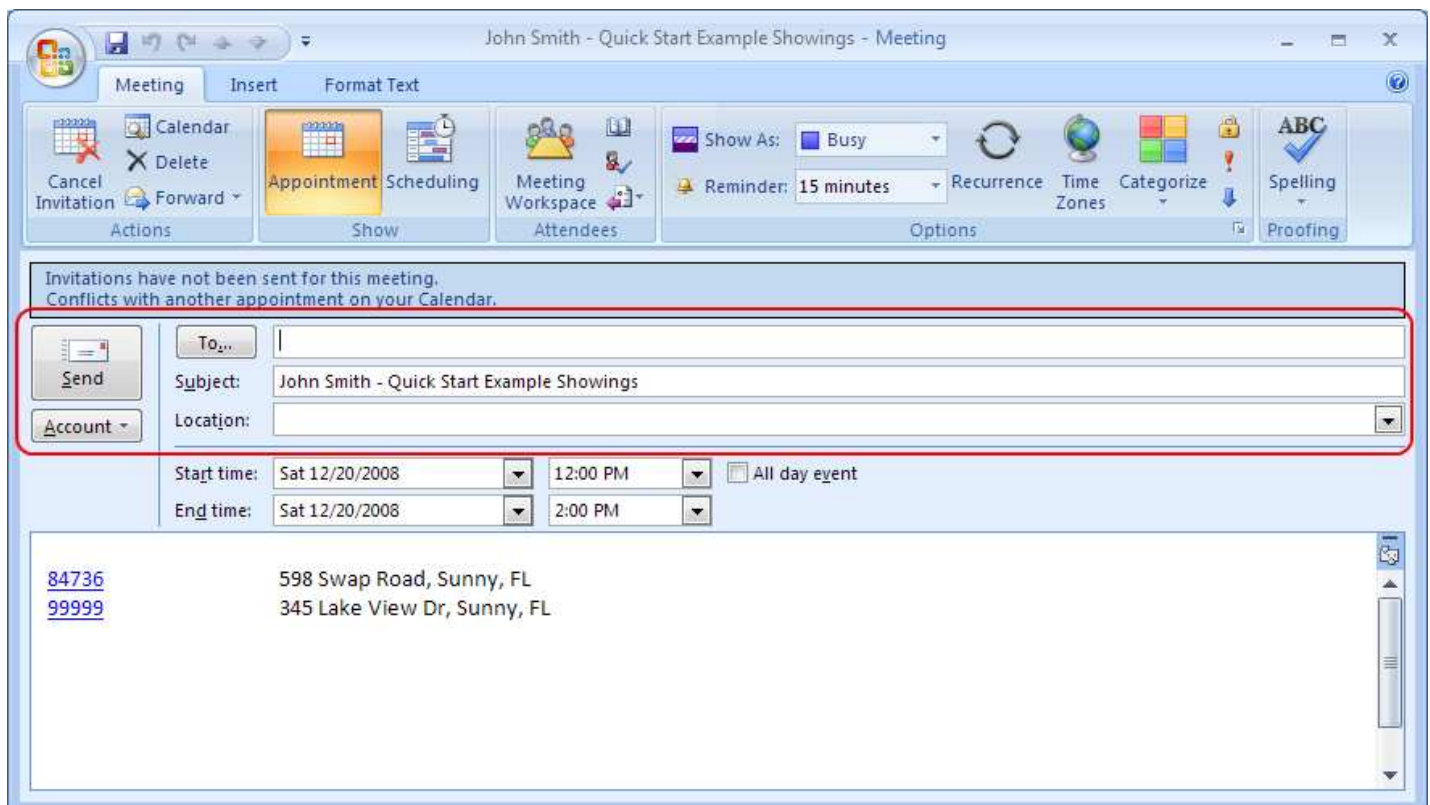


You'll need to contact your local MLS Board for the URL to use. But, in that URL you'd place {0} where the MLS number would go. This will then place the MLS number from the Candidate Property Log into the URL and then open the link in your browser. (Note: some boards like SoCal use both an internal MLS number and provide a different MLS number to external sites like Realtor.com.)

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.



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.



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 Doe Dream Home - RECMPurchase

RECMPurchase Insert Format Text Developer

Save & New Send Delete Actions Requirements Candidate Properties Show Contacts E-mail Meeting Call Web Page Map Assign Task Business Card Picture Categorize Follow Up Private Address Book Check Names Spelling Proofing

Offered Purchase Price \$0.00 % Off List 0.00% Offer Status [dropdown] Clear Offer

Property Details Contract Details Documents & Commissions

Address... [text box] List Price \$0.00 Area [dropdown] Subdivision [dropdown]

General Details

MLS ID [text box] Tax ID [text box] Taxes \$0.00 Tax Year [text box] Type [dropdown]
Sq Ft 0 SqFt Source [dropdown] Lot Size 0.00 Year Built [text box] Style [dropdown]
Garage [dropdown] Additional Parking [dropdown] HOA Dues \$0 Frequency [dropdown]

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: [text box]
☐ Other Restrictions [text box]

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 three sub-tabs: 'Property Details', 'Contract Details', and 'Documents & Commissions'. The 'Property Details' sub-tab is active. It contains several input fields and dropdown menus organized into sections: 'General Details' and 'Room Details'. The 'General Details' section includes fields for MLS ID, Tax ID, Taxes (\$0.00), Tax Year, Type, Sq Ft (0), SqFt Source, Lot Size (0.00), Year Built, Style, Garage, Additional Parking, HOA Dues (\$0), and Frequency. The 'Room Details' section includes dropdown menus for Bedroom, Living Room, Fireplace, Attic, Bath - Full, Family Room, Office, Theater/Media Room, Bath - 3/4, Great Room, Study/Den, Fitness Center, Bath - 1/2, Kitchen, Loft, Pool, Bath - Total, and Laundry. The 'Other' section includes checkboxes for 'Tenant Occupied', 'Nightly Rentals Allowed', 'Pet Restrictions', 'Assessment' (Amount: \$0.00, Purpose:), and 'Other Restrictions'.

Property Details | Contract Details | Documents & Commissions

Address... [Text Field] List Price [Text Field: \$0.00]
Area [Dropdown Menu] Subdivision [Dropdown Menu]

General Details

MLS ID [Text Field] Tax ID [Text Field] Taxes [Text Field: \$0.00] Tax Year [Text Field] Type [Dropdown Menu]
Sq Ft [Text Field: 0] SqFt Source [Dropdown Menu] Lot Size [Text Field: 0.00] Year Built [Text Field] Style [Dropdown Menu]
Garage [Dropdown Menu] Additional Parking [Dropdown Menu] HOA Dues [Text Field: \$0] Frequency [Dropdown Menu]

Room Details

Bedroom [Dropdown Menu: 0] Living Room [Dropdown Menu: 0] Fireplace [Dropdown Menu: 0] Attic [Dropdown Menu: No]
Bath - Full [Dropdown Menu: 0] Family Room [Dropdown Menu: 0] Office [Dropdown Menu: 0] Theater/Media Room [Dropdown Menu: No]
Bath - 3/4 [Dropdown Menu: 0] Great Room [Dropdown Menu: 0] Study/Den [Dropdown Menu: 0] Fitness Center [Dropdown Menu: No]
Bath - 1/2 [Dropdown Menu: 0] Kitchen [Dropdown Menu: 0] Loft [Dropdown Menu: 0] Pool [Dropdown Menu: No]
Bath - Total [Text Field: 0] Laundry [Dropdown Menu: 0]

Other

☐ Tenant Occupied
☐ Nightly Rentals Allowed
☐ Pet Restrictions
☐ Assessment Amount: [Text Field: \$0.00] Purpose: [Text Field]
☐ Other Restrictions [Text Field]

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".

Property Details	Contract Details	Documents & Commissions																																																																			
<div> <div> Offer Amounts <table> <tr><td>Earnest Money</td><td>\$0.00</td></tr> <tr><td>Loan Amount</td><td>\$0.00</td></tr> <tr><td>Cash</td><td>\$0.00</td></tr> <tr><td>Seller Financing</td><td>\$0.00</td></tr> <tr><td>Other</td><td>\$0.00</td></tr> <tr><td>Total</td><td>\$0.00</td></tr> <tr><td>Seller Paid Closing Costs</td><td>\$0.00</td></tr> </table> </div> <div> Purchase Contingencies <table> <tr><td><input type="checkbox"/> Purchase Contingent on Appraisal</td></tr> <tr><td><input type="checkbox"/> Purchase Contingent on Financing</td></tr> <tr><td>Financing Type <input type="text"/></td></tr> <tr><td>Terms <input type="text"/></td></tr> <tr><td><input type="checkbox"/> Buyer Approval of Seller Disclosures</td></tr> <tr><td><input type="checkbox"/> Buyer Approval of Physical Property Condition</td></tr> <tr><td><input type="checkbox"/> Ability to Obtain Home Owners Insurance</td></tr> <tr><td><input type="checkbox"/> <input type="text"/></td></tr> <tr><td><input type="checkbox"/> <input type="text"/></td></tr> </table> </div> <div> Contract Deadlines <table> <tr><td>Seller Response Deadline</td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td>Earnest Money Deposit</td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td>Attorney Review</td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td>Seller Disclosures To Buyer</td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td>Inspections Deadline</td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td>Appraisal Deadline</td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td>Loan Denial Deadline</td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td>Closing Deadline</td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td><input type="text"/></td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td><input type="text"/></td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> <tr><td><input type="text"/></td><td>None</td><td><input type="text"/></td><td>Remind</td></tr> </table> </div> </div>			Earnest Money	\$0.00	Loan Amount	\$0.00	Cash	\$0.00	Seller Financing	\$0.00	Other	\$0.00	Total	\$0.00	Seller Paid Closing Costs	\$0.00	<input type="checkbox"/> Purchase Contingent on Appraisal	<input type="checkbox"/> Purchase Contingent on Financing	Financing Type <input type="text"/>	Terms <input type="text"/>	<input type="checkbox"/> Buyer Approval of Seller Disclosures	<input type="checkbox"/> Buyer Approval of Physical Property Condition	<input type="checkbox"/> Ability to Obtain Home Owners Insurance	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	Seller Response Deadline	None	<input type="text"/>	Remind	Earnest Money Deposit	None	<input type="text"/>	Remind	Attorney Review	None	<input type="text"/>	Remind	Seller Disclosures To Buyer	None	<input type="text"/>	Remind	Inspections Deadline	None	<input type="text"/>	Remind	Appraisal Deadline	None	<input type="text"/>	Remind	Loan Denial Deadline	None	<input type="text"/>	Remind	Closing Deadline	None	<input type="text"/>	Remind	<input type="text"/>	None	<input type="text"/>	Remind	<input type="text"/>	None	<input type="text"/>	Remind	<input type="text"/>	None	<input type="text"/>	Remind
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3. DOCUMENTS & COMMISSIONS TAB

The Documents & Commissions Tab allows you to estimate your commission and to store documents associated with the transaction.

Property Details	Contract Details	Documents & Commissions																																																												
<div> <div> Commissions and Fees Computed from List Price if no Purchase Price entered on the Offer Tab <table> <tr><td>Seller Agent Commission</td><td>0%</td><td>\$0.00</td></tr> <tr><td>Buyer Agent Commission</td><td>0%</td><td>\$0.00</td></tr> <tr><td>Total Commission</td><td>0%</td><td>\$0.00</td></tr> <tr><td>Referral Fee *</td><td>0%</td><td>\$0.00</td></tr> <tr><td>Buyer Agent Bonus</td><td colspan="2">\$0.00</td></tr> </table> <div> Est. How Much You Will Earn <table> <tr><td>Office Fee (Split) *</td><td>0%</td><td>\$0.00</td></tr> <tr><td>Franchise Fee *</td><td>0%</td><td>\$0.00</td></tr> <tr><td>Other Fees (%) *</td><td>0%</td><td>\$0.00</td></tr> <tr><td>Other Fees (\$)</td><td colspan="2">\$0.00</td></tr> <tr><td>Total Est. Earning</td><td colspan="2">\$0.00</td></tr> </table> </div> <p>* Computed as percentage of Buyer Agent Commission</p> </div> <div> Documents On File <table> <tr><td><input type="checkbox"/> Listing Agreement</td><td><input type="checkbox"/> Permits</td></tr> <tr><td><input type="checkbox"/> Agency Agreement</td><td><input type="checkbox"/> Peculation Test</td></tr> <tr><td><input type="checkbox"/> MLS Datasheet</td><td><input type="checkbox"/> Property Inventory</td></tr> <tr><td><input type="checkbox"/> Seller Disclosures</td><td><input type="checkbox"/> Plat Map</td></tr> <tr><td><input type="checkbox"/> 1031 Exchange</td><td><input type="checkbox"/> Preliminary Title Rpt</td></tr> <tr><td><input type="checkbox"/> Appraisal</td><td><input type="checkbox"/> Radon Test</td></tr> <tr><td><input type="checkbox"/> Asbestos Inspection</td><td><input type="checkbox"/> Rental/Lease Agree</td></tr> <tr><td><input checked="" type="checkbox"/> CC&Rs</td><td><input type="checkbox"/> Rental Revenue</td></tr> <tr><td><input type="checkbox"/> Financials</td><td><input type="checkbox"/> Survey</td></tr> <tr><td><input type="checkbox"/> Flood Plain</td><td><input type="checkbox"/> Utilities</td></tr> <tr><td><input type="checkbox"/> Greenbelt</td><td><input type="checkbox"/> Warranties</td></tr> <tr><td><input type="checkbox"/> HOA Minutes</td><td><input type="text"/></td></tr> <tr><td><input type="checkbox"/> House/Floor Plans</td><td><input type="text"/></td></tr> <tr><td><input type="checkbox"/> Lead Based Paint</td><td><input type="text"/></td></tr> <tr><td><input type="checkbox"/> Mold Inspection</td><td><input type="text"/></td></tr> </table> <div> Drag & Drop documents to store them within the contact form. <div> <input type="text"/> </div> </div> </div> </div>			Seller Agent Commission	0%	\$0.00	Buyer Agent Commission	0%	\$0.00	Total Commission	0%	\$0.00	Referral Fee *	0%	\$0.00	Buyer Agent Bonus	\$0.00		Office Fee (Split) *	0%	\$0.00	Franchise Fee *	0%	\$0.00	Other Fees (%) *	0%	\$0.00	Other Fees (\$)	\$0.00		Total Est. Earning	\$0.00		<input type="checkbox"/> Listing Agreement	<input type="checkbox"/> Permits	<input type="checkbox"/> Agency Agreement	<input type="checkbox"/> Peculation Test	<input type="checkbox"/> MLS Datasheet	<input type="checkbox"/> Property Inventory	<input type="checkbox"/> Seller Disclosures	<input type="checkbox"/> Plat Map	<input type="checkbox"/> 1031 Exchange	<input type="checkbox"/> Preliminary Title Rpt	<input type="checkbox"/> Appraisal	<input type="checkbox"/> Radon Test	<input type="checkbox"/> Asbestos Inspection	<input type="checkbox"/> Rental/Lease Agree	<input checked="" type="checkbox"/> CC&Rs	<input type="checkbox"/> Rental Revenue	<input type="checkbox"/> Financials	<input type="checkbox"/> Survey	<input type="checkbox"/> Flood Plain	<input type="checkbox"/> Utilities	<input type="checkbox"/> Greenbelt	<input type="checkbox"/> Warranties	<input type="checkbox"/> HOA Minutes	<input type="text"/>	<input type="checkbox"/> House/Floor Plans	<input type="text"/>	<input type="checkbox"/> Lead Based Paint	<input type="text"/>	<input type="checkbox"/> Mold Inspection	<input type="text"/>
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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	Open	Appointment
Seller's Agent				Open	Appointment
Attorney				Open	Appointment
Appraiser				Open	Appointment
HOA Contact				Open	Appointment
Rental Company				Open	Appointment
Pest Inspector				Open	Appointment
Property Inspector				Open	Appointment
Property Mgt Company				Open	Appointment
Referring Agent				Open	Appointment
Title/Escrow Officer				Open	Appointment
				Open	Appointment
				Open	Appointment
				Open	Appointment
				Open	Appointment
				Open	Appointment
				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.

Real Estate - Contacts

Select Folder: Contacts

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

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' row is highlighted, showing 'Robert West' and 'Florida Property Inspectors'. The 'Open' button in this row is circled in red. The contact form on the right is titled 'Robert West - Contact' and contains 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). A red arrow points from the 'Open' button in the contact list to the contact form.

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

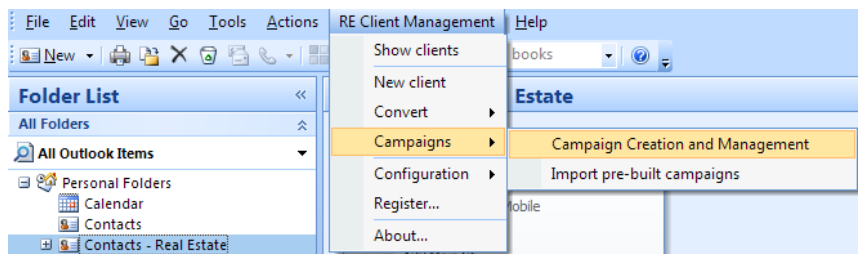
The screenshot shows the same software interface as the previous one, but with the 'Appointment' button in the 'Property Inspector' row of the contact list circled in red. The 'Event' form on the right is titled 'Property Inspector Robert West - Event' and contains fields for Subject, Location, Start time, End time, and a checkbox for 'All day event'. A red arrow points from the 'Appointment' button in the contact list to the event form.

CAMPAIGN MODULE

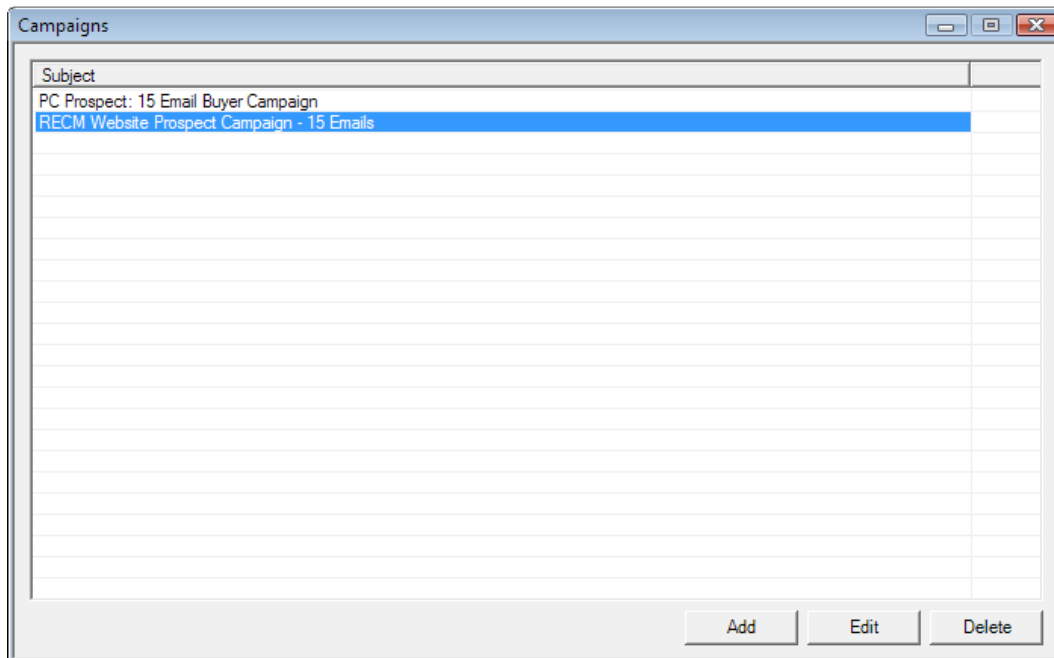
The Campaign Module allows you to create Action Plan or Drip Email templates that you can use over and over to market, communicate, and manage your clients and transactions. You also have the ability to import campaigns that we'll make available on www.RealEstateClientManagement.com/campaigns.aspx.

If you would like to contribute a campaign for distribution to the RECM user community, please email it to: support@realestateclientmanagement.com as a Microsoft Excel or Word document (these will need to be your own creation). We'll put it into the RECM format and put up on the website.

CREATE AND MANAGE CAMPAIGN TEMPLATES



You can access or create campaigns from the main Outlook toolbar under RE Client Management – Campaigns – Campaign Creation and Management.



This will bring up the Campaign Module. You won't see any Campaigns until you've created a Campaign or imported a Pre-built Campaign. We'll cover how to create a campaign in the Quick Start guide.

CREATE NEW CAMPAIGN

Click the “Add” button will open a New Campaign template form.

Item Type	Subject	Days Out

Campaigns can consist of customized Emails, Appointments, or Tasks. You also have the ability to import campaigns that you have previously built into new campaigns.

1. NAME CAMPAIGN

Campaign Name: RECM Test Campaign

We recommend naming your campaign and then clicking the Apply button before creating any Campaign Events.

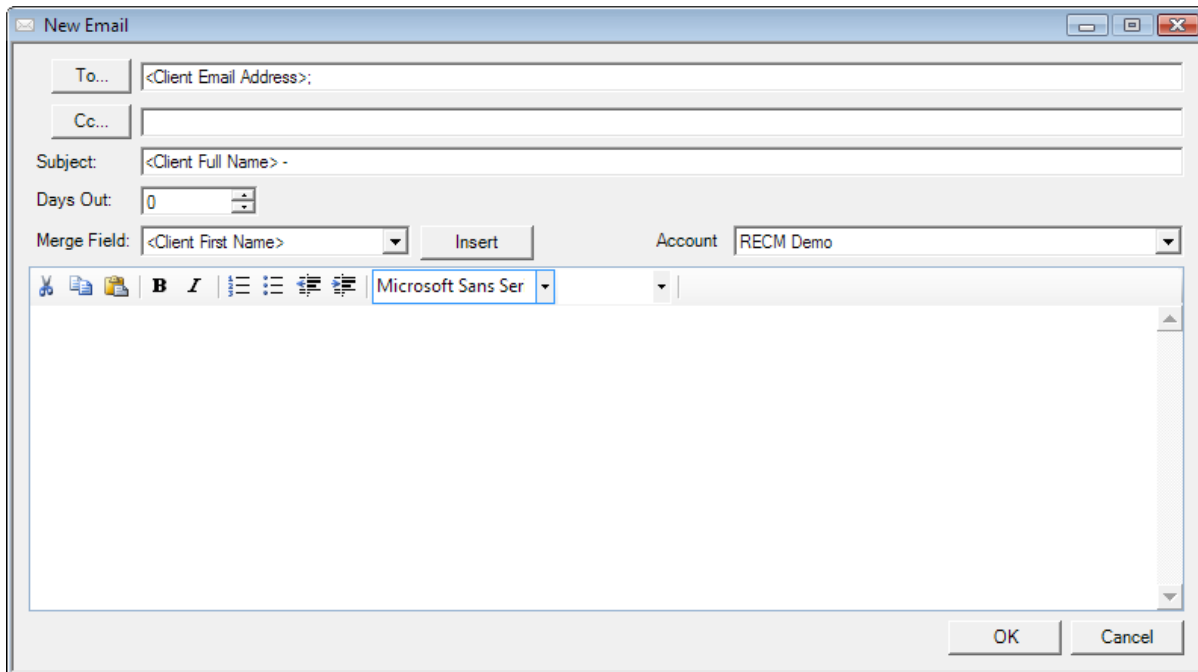
2. IMPORT CAMPAIGN

Subject
PC Prospect: 15 Email Buyer Campaign
RECM Website Prospect Campaign - 15 Emails

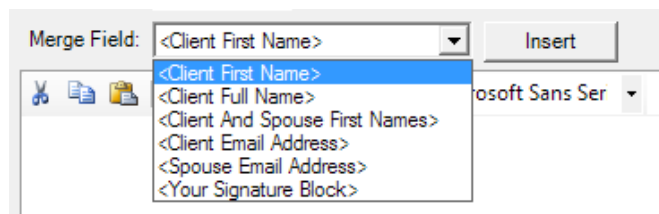
Select only one campaign to view its items

To import an existing campaign, click on the campaign and then click the Import button. All the events (emails, appointments, and tasks) will be imported and become part of the new campaign.

3. ADD EMAIL

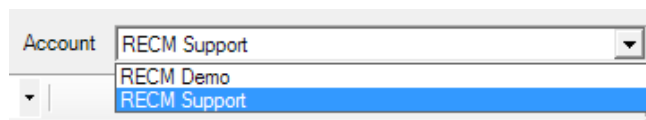


- a. Merge Field: Before covering the rest of the form, we need to discuss the concept of “Merge Fields”



These are fields that are used to merge information contained within an individual client form into the campaign. This merging occurs when the campaign is applied to an individual client. For example, if you insert the <Client First Name> merge field into the body of the email, then the client’s first name will be substituted into the email when the campaign is applied to the client. You would do this by positioning the cursor on the for where you want the field to go, selecting the field from the Merge Field dropdown, and click the insert button.

- b. Account: This will appear if you have multiple email accounts that you sync with Outlook.



This is used to 1) set which account emails will be sent from and 2) which signature block will be associated with the <Your Signature Block> merge field. It is set initially to your default email account.

- c. TO: This field is pre-populated with <Client Email Address>. If you don’t want the email to go to the client, delete the merge field. However, you must have at least one email address in the TO: field.

If you click on the TO: or CC: button, this will bring up a list of contacts (just like it in a normal Outlook Email). This is useful if you want to someone else to also receive the email ... such as your assistant or marketing person or business partner.

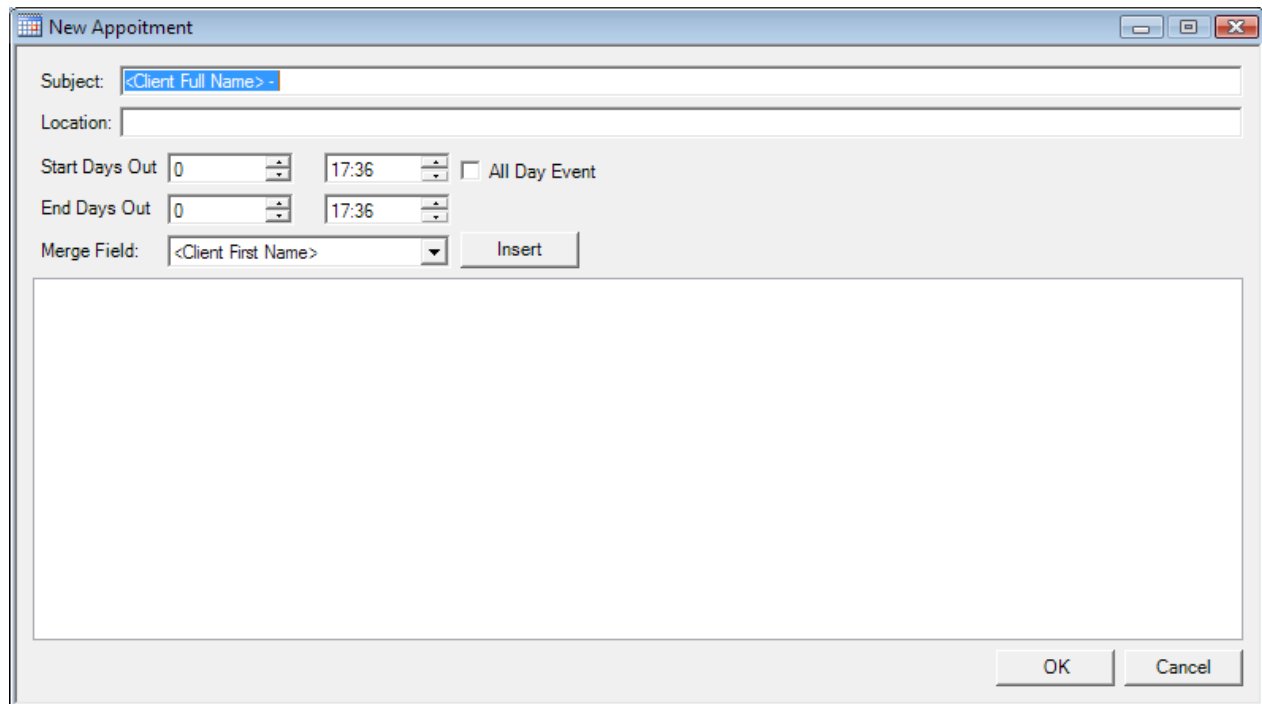
- d. Subject: Pre-populated with "<Client Full Name> - ". You may delete this merge field when adding your subject. But, we find it useful so you can find individual client emails in your Outbox.
- e. Days Out: This sets the date when the email will be sent. For example, if you set this to 10 days and the date you apply the campaign to the client is 1 January, then this would cause the email to be sent on 11 January (or 10 full days later).

To do this, we use Outlook's ability to "Defer Until" for sending email messages. So, when the campaign is applied to a client, the email is created and placed in your outbox. It will stay in your outbox until the deferred date, then will automatically be sent. More on this in a later section.

- f. Email Body. This acts just like the body of the standard Outlook email message. With that added ability to insert merge fields into the text. If you insert <Client First Name>, then client's first name will be merged and inserted at that the cursor. If you insert <Your Signature Block>, then the signature block associated with the email account you have selected will be merged and inserted at the cursor.

Once you've created the email, click OK and it will be added to the campaign. Remember that the emails should be written to your client base. Use the merge fields to personalize it for each client.

4. ADD APPOINTMENT



- a. Merge Field. As with the email form, the Add Appointment form uses the same Merge Field capabilities that allow you to customize the appointment to each client. Select the Merge Field you want to use, place your cursor where you want the merge field to go, and click the insert button.
- b. Subject. The <Client Full Name> merge field is automatically included. You can delete this if you wish. But, we suggest always starting with the client name so you can easily differentiate it from other appointments.

- c. Start Days Out and End Days Out. This allows you to set the timeframe for when the appointment would occur. The appointment will be created for X days (based on these fields) after the Campaign has been applied to a particular client. So, if you set both fields to 10 and you apply the Campaign to a client on January 1 then the appointment would be created for January 11 (10 full days afterwards). These appointments are added to your default calendar.

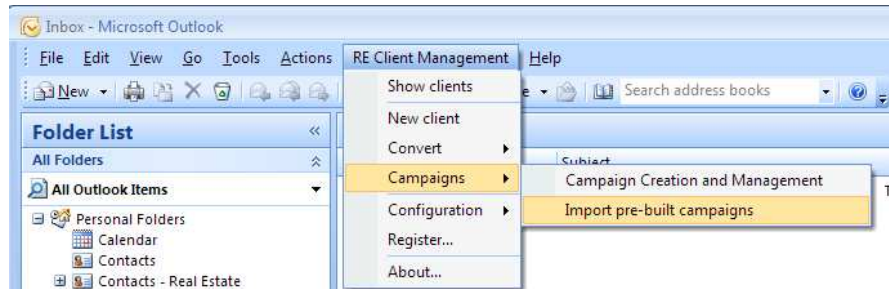
5. Add Task

The screenshot shows a 'New Task' dialog box. The 'Subject' field has a dropdown menu with '<Client Full Name>' selected. The 'Start Days Out' and 'Due Days Out' fields are numeric input boxes with '0' entered. The 'Status' dropdown shows 'Not Started' and the 'Priority' dropdown shows 'Low'. The 'Merge Field' dropdown shows '<Client First Name>' with an 'Insert' button next to it. The dialog box has a large empty text area below the fields and 'OK' and 'Cancel' buttons at the bottom right.

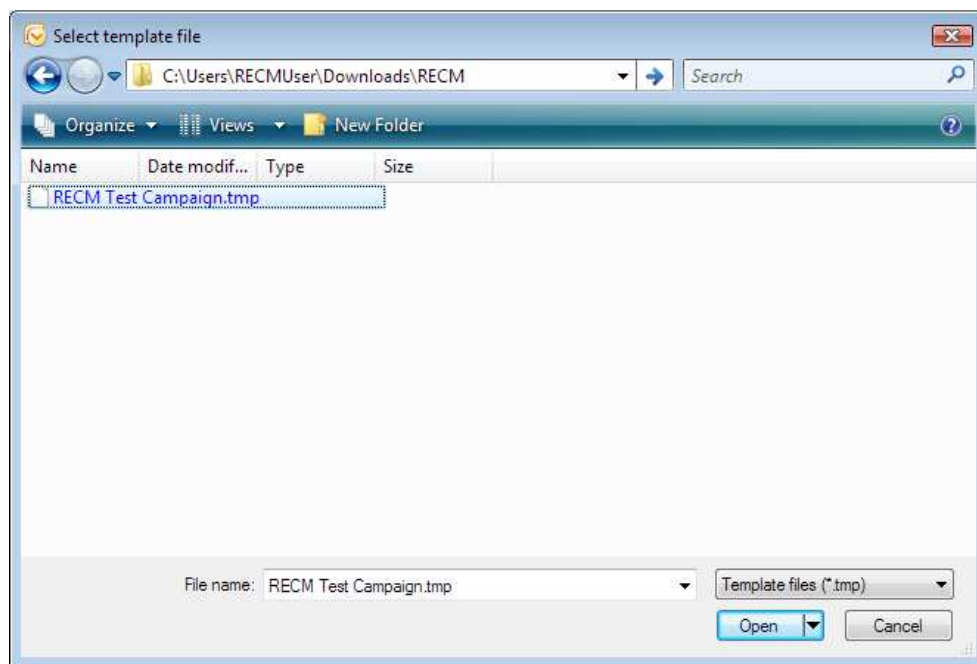
- a. Merge Field: As with the email form, the Add Task form uses the same the same Merge Field capabilities that allow you to customize the task to each client. Select the Merge Field you want to use, place your cursor where you want the merge field to go, and click the insert button.
- b. Subject. The <Client Full Name> merge field is automatically included. You can delete this if you wish. But, we suggest always starting with the client name so you can easily differentiate it from other tasks.
- c. Start Days Out and End Days Out. This allows you to set the timeframe for when the task would occur. The task will be created for X days (based on these fields) after the Campaign has been applied to a particular client. So, if you set both fields to 10 and you apply the Campaign to a client on January 1 then the task would be created for January 11 (10 full days afterwards).

IMPORT PRE-BUILT CAMPAIGNS

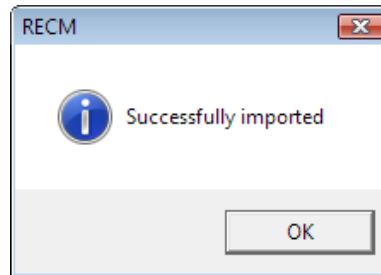
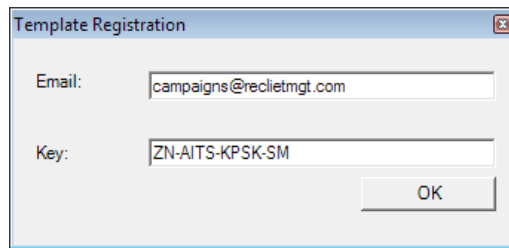
On the www.RealEstateClientManagement.com website on the Campaigns link, we provide free and commercial campaign templates that you can download. If you have a campaign of your own creation and you want to make it available to the RECM community, email a copy of it to: support@realestateclientmanagement.com. It would need to be in MS Excel or MS Word format (a template is available on the site for download). We'll review it, convert it into RECM format, and make it available for others to use.



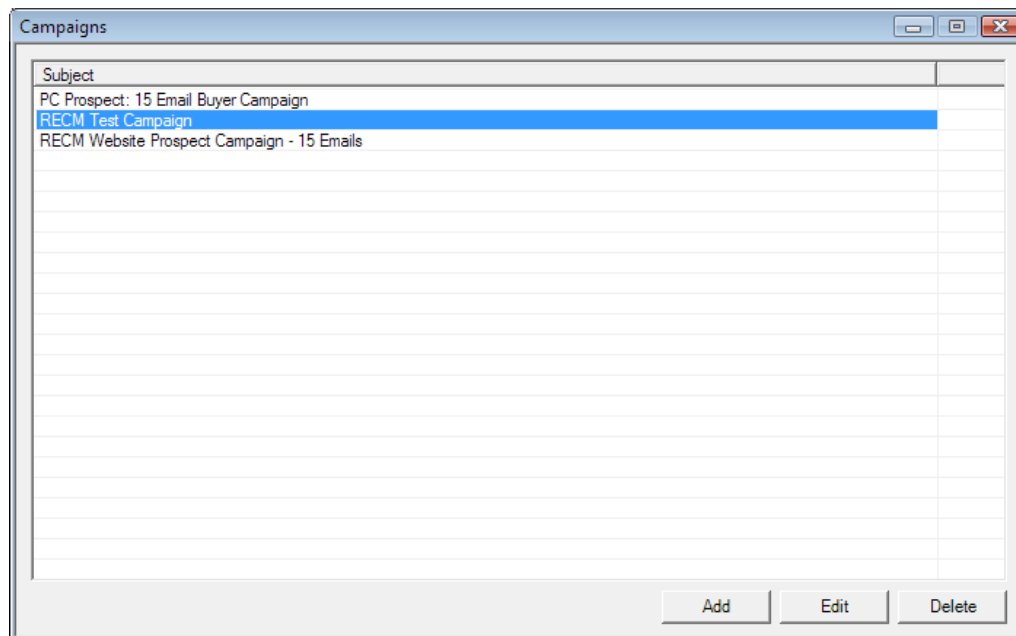
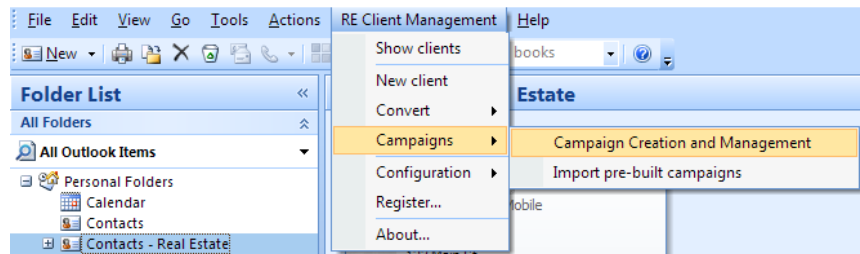
Download the campaign to your computer. Then from the main Outlook toolbar, click on RE Client management – Campaigns – Import pre-built campaigns. This will a Windows File Manager form – navigate to the folder where you downloaded the Campaign template and select the template.



You'll then see a registration screen. If the it is a commercial campaign (i.e. one that we have to pay for), then a registration will be provided to you when you purchase it. Else, the registration email and key will be provided on the www.RealEstateClientManagement.com website on the Campaigns page. Enter the registration and click OK.



If you have entered the information correctly, the you will see a dialog box telling you the Campaign has been successfully imported.



Now when you open the Campaigns form, you'll see the imported campaigns as available.

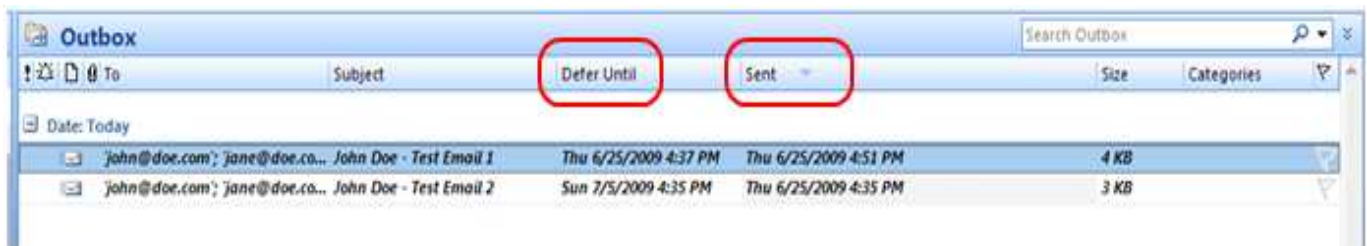
TIPS AND TRICKS

DEFERRED EMAIL NOT BEING SENT

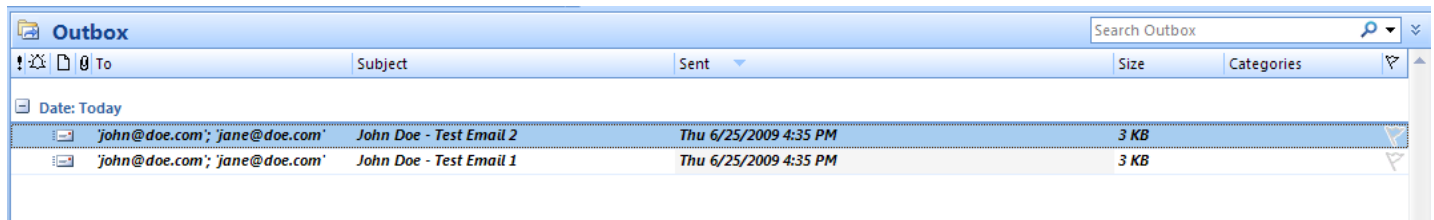
If you open a campaign email after it has been created, the “Sent” date is set to “None” and the email won’t be sent out. This is a normal Outlook behavior and occurs for any email in your Outbox. If you need to open an email, after you are done, close it by clicking the SEND button. This tells Outlook you still want the email sent on the “Defer Until” date (it won’t immediately be sent out).

SHOW DEFERRED DATE IN OUTBOX

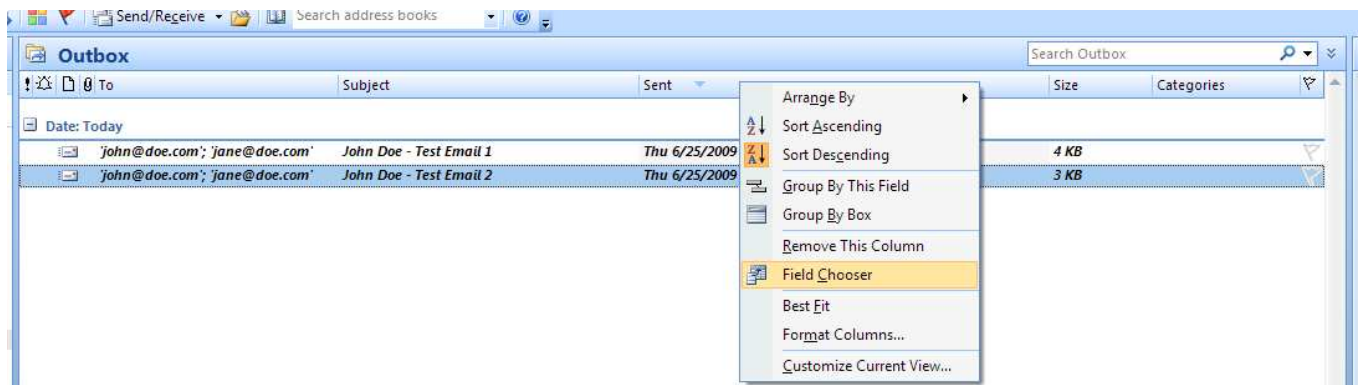
There are two dates associated with an email message:



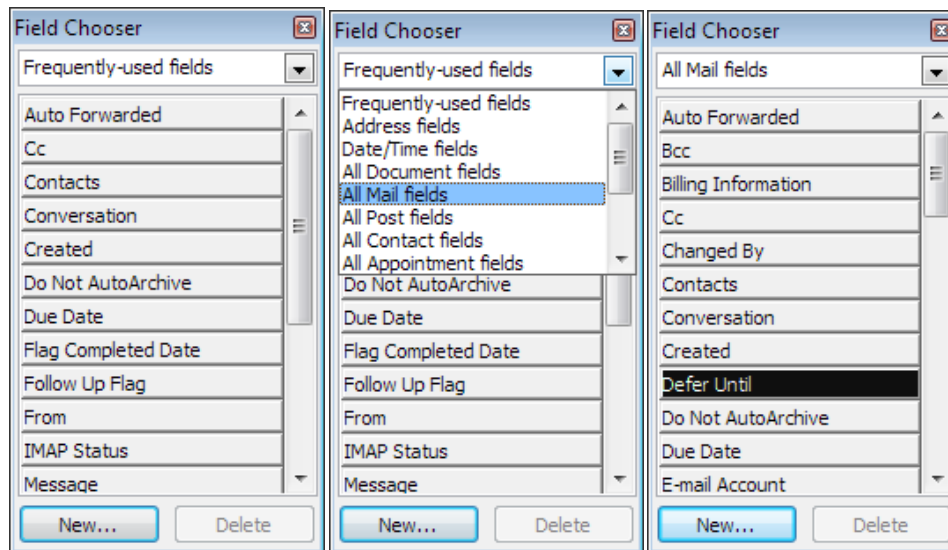
- 1) Sent – for campaigns this would be the date the email was actually created and placed in the outbox.
- 2) Deferred Until – this is the date when the email will actually be sent. This column is **not shown by default** in the outbox. So, let’s look at how to add it as a column (like the above image).



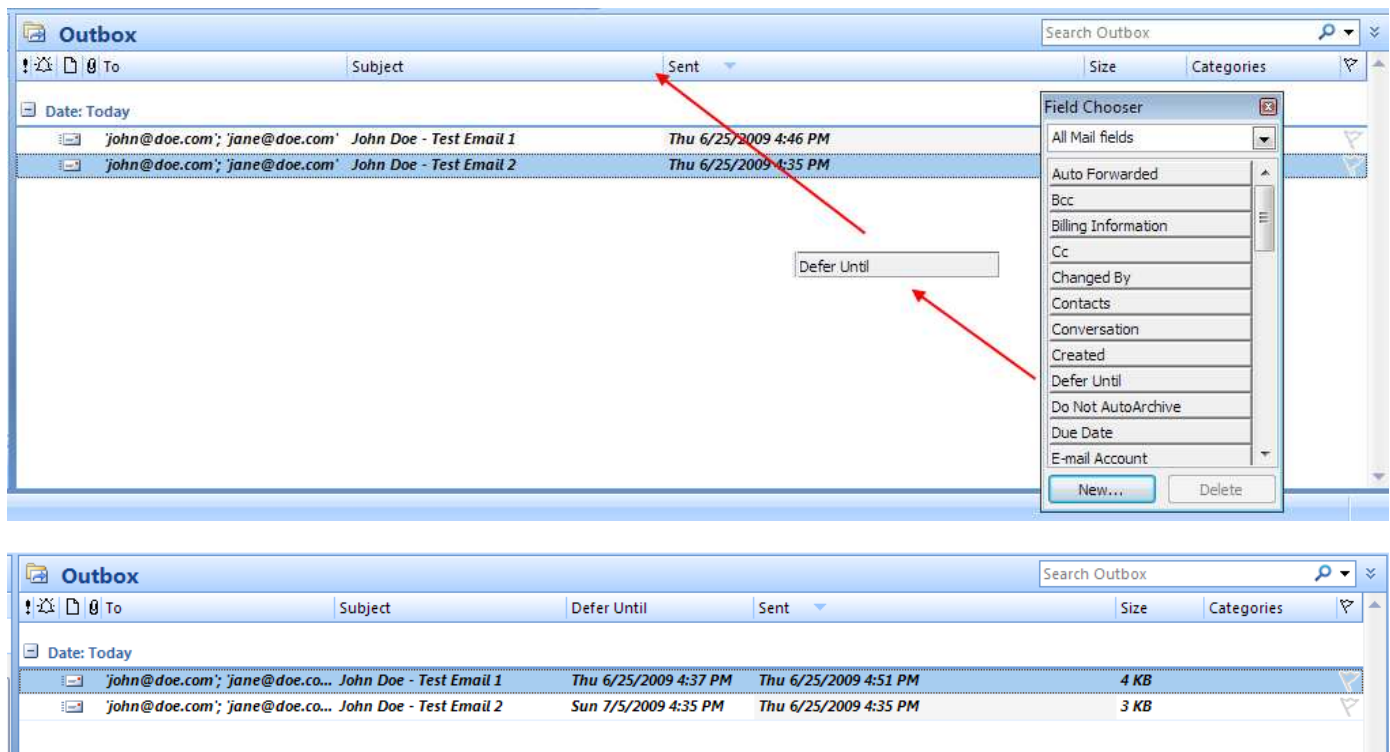
For this example, I’ve applied a Campaign to a RECM client. This created two drip emails and placed them in the outbox: “John Doe – Test Email 1” and “John Doe – Test Email 2”. The above image shows the standard Outbox view.



Right click on the column headers (e.g. To, Subject, Sent) and select “Field Chooser”



Click on the dropdown menu and choose “All Mail Fields”. Then click on the “Defer Until” and then drag in it onto the column header. (You drag my clicking and holding down the left mouse button while dragging the chosen field.)



Notice that both emails were Sent (Created) on 6/25/2009. But, “John Doe – Test Email 2” is Deferred Until 7/5/2009 – 10 days after it was created.