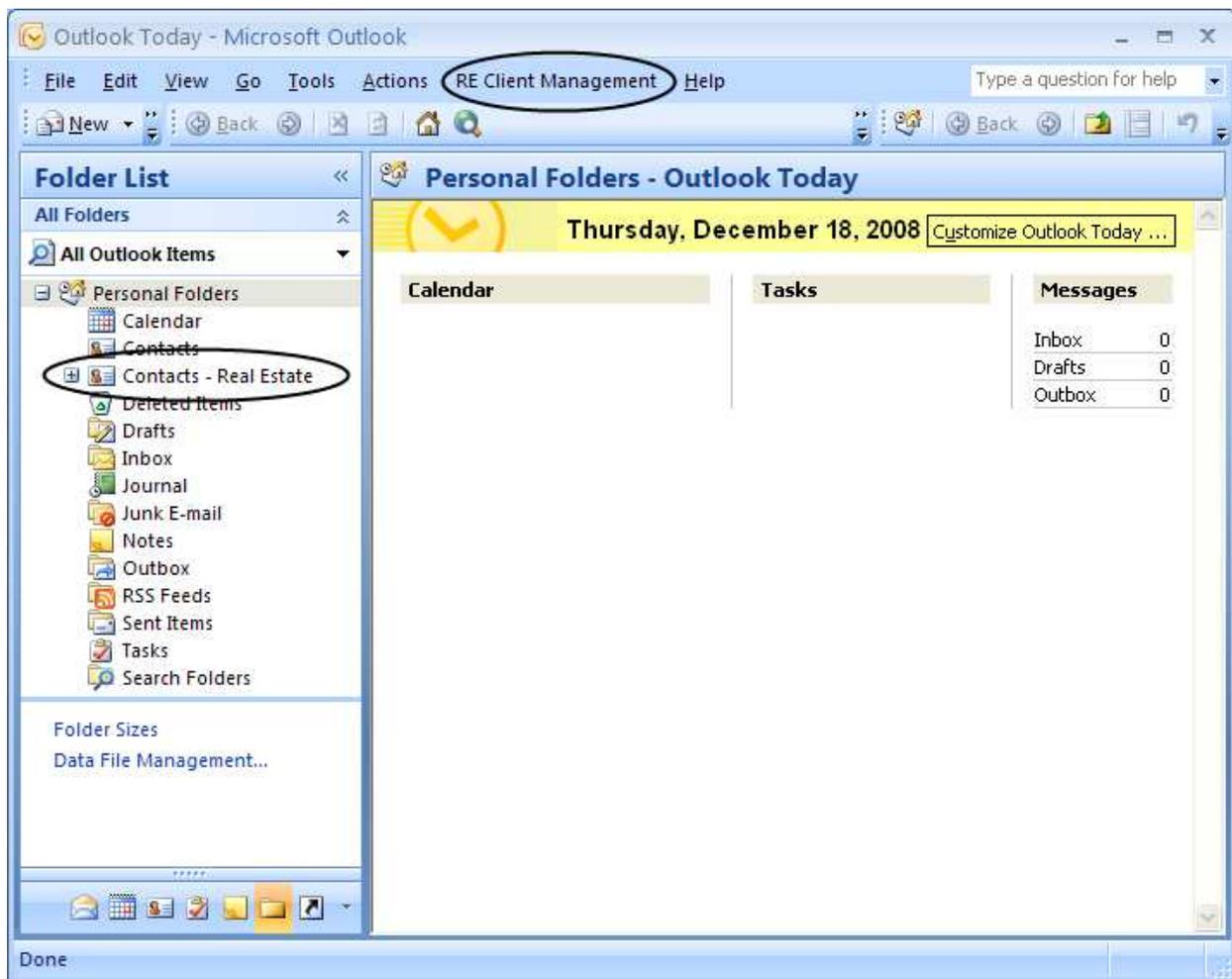


REAL ESTATE CLIENT MANAGEMENT QUICK START GUIDE

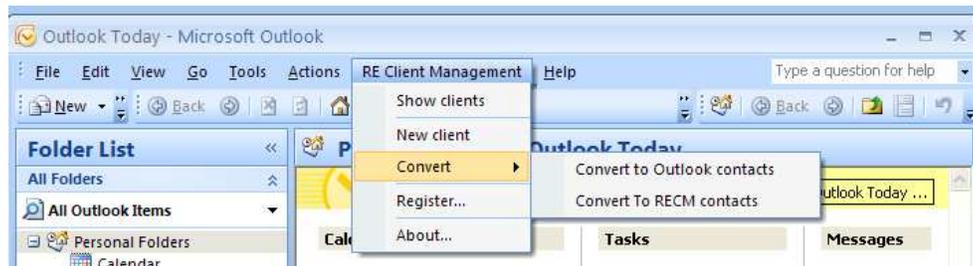
The purpose of the quick start guide is to help you get started using the Real Estate Client Management (RECM) product quickly. For a more in-depth quick start, watch the Overview Tutorial video at:

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. The window title is 'Untitled - RECMClient'. It features a menu bar (File, Insert, Format Text, Developer) and a toolbar with various icons. The main area is a form with several sections: 'Full Name...', 'Company', 'Home', 'Business Fax', 'Mobile', 'Spouse' (with fields for Job Title, Company, Business Phone, Home Fax, Mobile Phone, and File Ac.), and 'Client Information' (with radio buttons for Buyer, Seller, and Both Buyer And Seller, and dropdowns for Client Status, Probability, Reason, and Source). There are also buttons for 'New Listing' and 'New Purchase'. At the bottom, there are fields for 'Address...', 'Home', 'E-mail', and 'Display Ac.', along with a checkbox 'This is the mailing address' and a large text area.

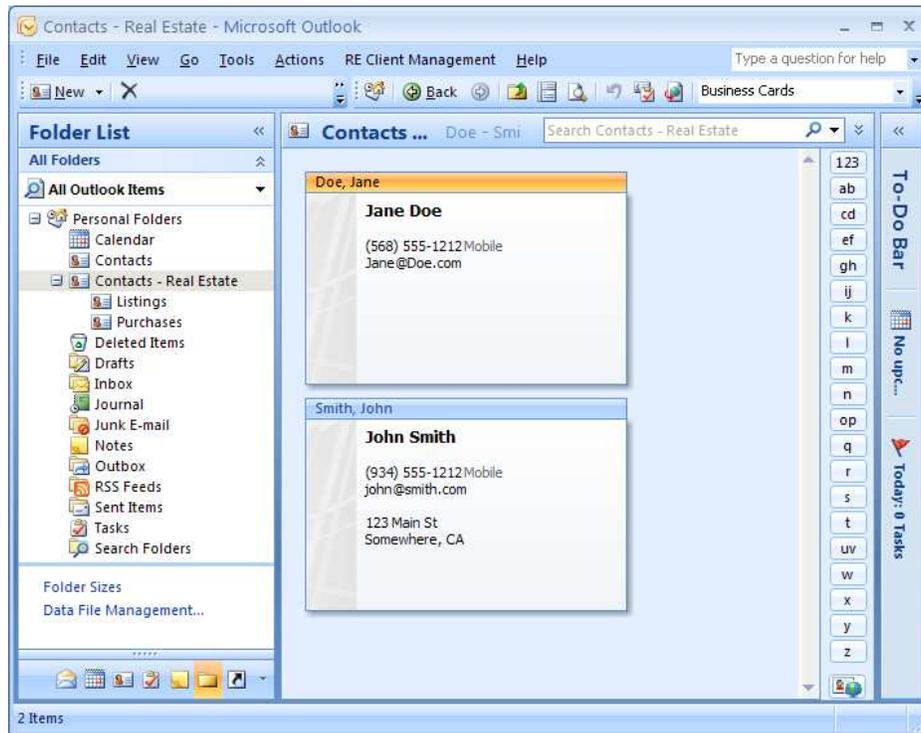
3. **Convert to Outlook contacts.** This will convert your RECM contacts back to the standard Microsoft Outlook format and copy them to the selected “Contacts” folder.

A screenshot of the 'CopyContactsForm' dialog box. It has a title bar with 'CopyContactsForm' and a close button. The dialog contains a 'Copy to...' dropdown menu set to 'Contacts' and a 'Convert Selected' button. Below 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', with 'Select All' being checked.

- 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.

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 software interface for a client named John Smith. The window title is "John Smith - RECMClient". The ribbon includes "RECMClient", "Insert", "Format Text", and "Developer". The "Activities" button in the "Developer" ribbon is highlighted with a red box and the number 4. The form contains several sections: "Full Name..." (John Smith), "Job Title:", "Company:", "Business", "Home", "Business Fax", "Mobile" (with a dropdown menu), "Spouse:", "Spouse Job Title:", "Spouse Company:", "Spouse Business Phone:", "Spouse Home Fax:", "Spouse Mobile Phone:", "File As:" (Smith, John), "Client Information" (with radio buttons for Buyer, Seller, and Both Buyer And Seller; dropdowns for Client Status: Inactive, Probability: Medium Probability, Reason: Move Up, and Source: Sphere Of Influence), "New Listing" and "New Purchase" buttons (highlighted with a red box and the number 2), "Client Details" tabs (Listings, Purchases, Family Details) (highlighted with a red box and the number 3), "Address..." (123 Main St, Somewhere, CA), "E-mail" (john@smith.com), "Display As:" (John Smith (john@smith.com)), and a checkbox "This is the mailing address". The bottom of the form has "Contacts...", "Categories...", and "Private" checkboxes.

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.

LISTING FORM

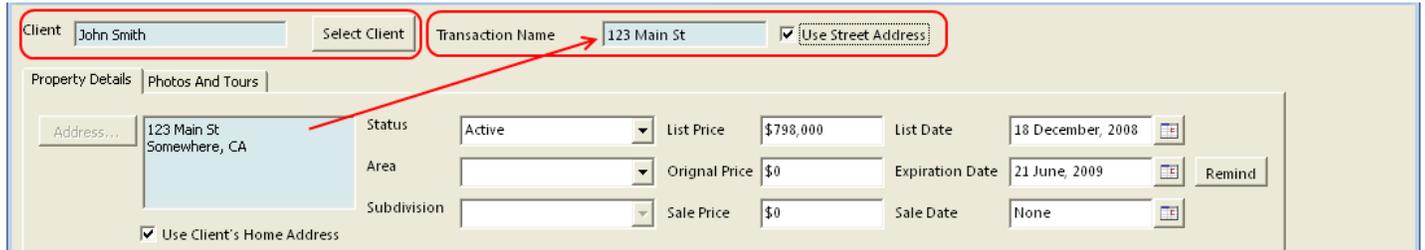
Forms for each Listing transaction are kept in the Listing folder. We strongly suggest that you only create Listing Forms via the Client Form. This ensures that the each listing transaction is properly associated with a specific client.

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. At the top, there are two main fields: 'Client' and 'Transaction Name'. The 'Client' field contains 'John Smith' and has a 'Select Client' button next to it. The 'Transaction Name' field contains '123 Main St' and has a 'Use Street Address' checkbox checked. Below these fields, there are two tabs: 'Property Details' and 'Photos And Tours'. The 'Property Details' tab is active. It contains several 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). There is also a 'Remind' button and a 'Use Client's Home Address' checkbox 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 titled "Property Details" and includes the following fields:

- Client: John Smith
- Transaction Name: 123 Main St
- Use Street Address:
- Address: 123 Main St, Somewhere, CA
- Status: Active
- List Price: \$798,000
- List Date: 18 December, 2008
- Area: [Empty]
- Original Price: \$0
- Expiration Date: 21 June, 2009
- Subdivision: [Empty]
- Sale Price: \$0
- Sale Date: None
- Use Client's Home Address:

The "General Details" section includes:

- MLS ID: [Empty]
- Tax ID: [Empty]
- Taxes: \$0.00
- Tax Year: [Empty]
- Type: Single Family
- Sq Ft: 0
- SqFt Source: Public Record
- Lot Size: 0.00 Acre
- Year Built: [Empty]
- Style: [Empty]
- Garage: 2 Car
- Additional Parking: None
- HOA Dues: \$0
- Frequency: Not Applicable

The "Room Details" section includes:

- 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

The "Other" section includes:

- Tenant Occupied:
- Nightly Rentals Allowed:
- Pet Restrictions:
- Assessment Amount: \$0.00
- Purpose: [Empty]
- Other Restrictions: [Empty]

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

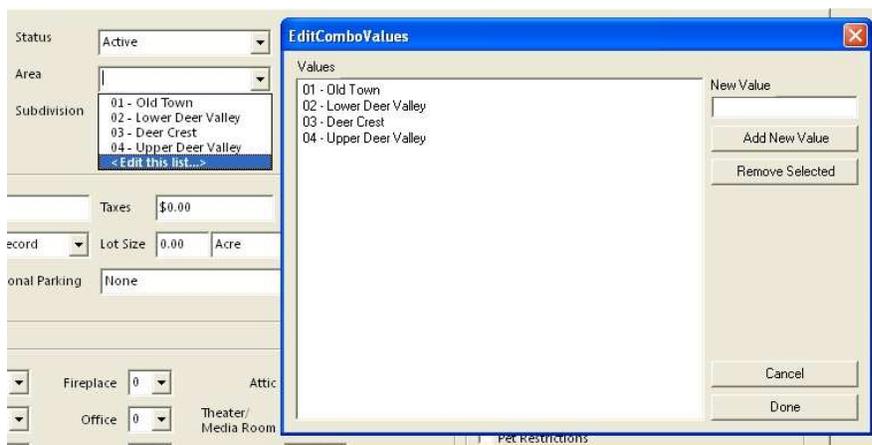
The screenshot shows the "Remind" button being clicked on the "Expiration Date" field. This opens a "Pick date..." calendar window for June 2009. The calendar shows the date 21 June 2009 selected. Below the calendar, the "Today: 12/19/2008" is displayed. The "Remind" button is highlighted with a red box, and a red arrow points from it to the "Pick date..." window.

The "Pick date..." window shows a calendar for June 2009. The date 21 June 2009 is selected. Below the calendar, the text "Today: 12/19/2008" is displayed. The "Remind" button is highlighted with a red box, and a red arrow points from it to the "Pick date..." window.

The "Listing Expiration: John Smith - 123 Main St - Event" window is shown below the calendar. It includes the following fields:

- Subject: Listing Expiration: John Smith - 123 Main St
- Location: [Empty]
- Start time: Sun 6/21/2009 12:00 AM
- End time: Sun 6/21/2009 12:00 AM
- All day event:

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.

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 "Insert" menu is open, showing options like "Property Information", "Listing Agreement", "Offer", and "Contacts". The "Format Text" menu shows "List", "Call", and "Map". The "Developer" menu shows "Business Card", "Picture", "Categorize", "Follow Up", "Private", "Address Book", and "Check Names".

Below the menu bar, there are fields for "Client" (John Smith) and "Transaction Name" (123 Main St). A "Select Client" button is next to the client field. A "Use Street Address" checkbox is checked.

The main area is titled "Property Details" and "Photos And Tours". It contains a grid of 10 image placeholders, labeled "Image 1" through "Image 10". Each placeholder has a "Browse" button and a "Delete" button below it. The "Image 1" placeholder is highlighted with a red box.

At the bottom, there are three text input fields with "Browse" buttons:

- Property Website Link (Enter Link starting with http://) with the value `http://www.RealEstateClientManagement.cc`
- Virtual Tour Link (Enter Link starting with http://)
- Video Tour (Enter YouTube link starting with http://) with the value `pr1=0x006699&color2=0x54abd6&border=1`

A note at the bottom reads: "(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.

John Smith 123 Main St - RECMListings

RECMListings Insert Format Text Developer

Save & New Delete Property Information Offer Listing Agreement Call Web Page Map Business Picture Categorize Follow Up Private Address Book Spelling

Commissions and Fees

Computed from List Price if no Purchase Price entered on the Offer Tab

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

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

- Signed Listing Contract
- Signed Agency Agreement
- Signed Seller Disclosures
- Provide Client Suggested Property Improvements
- Complete MLS Datasheet
- Upload Listing to MLS
- Get Key
- Install Keybox Code: Serial Number:
- Install Sign
- Schedule Office Tour 1/6/2009 12:00 PM Remind
- Schedule Realtor Tour 1/7/2009 10:00 AM Remind
- Take Property Photos None Remind
- Add Listing to Website
- Just Listed Cards
- Create Flyer

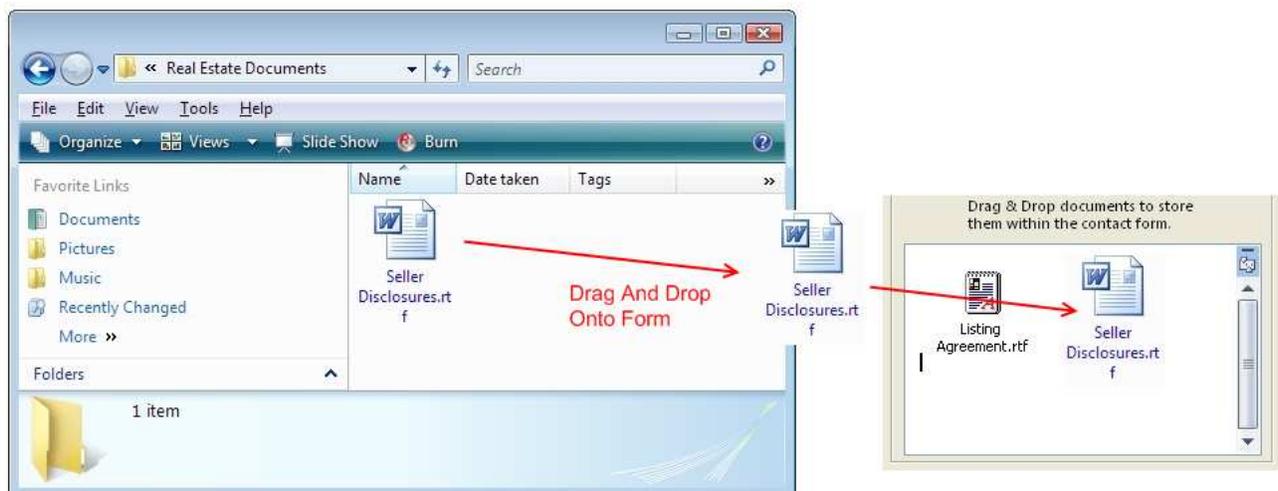
Documents On File

- 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
- Warranties

Drag & Drop documents to store them within the contact form.

Listing Agreement.rtf 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

The screenshot displays a software interface for scheduling tours. On the left, a list of options includes:

- Complete MLS Datasheet
- Upload Listing to MLS
- Get Key
- Install Keybox Code: [] Serial Number: []
- Install Sign
- Schedule Office Tour 1/6/2009 12:00 PM [Remind]
- Schedule Realtor Tour 1/7/2009 10:00 AM [Remind]
- Take Property Photos None [Remind]
- Add Listing to Website
- Just Listed Cards
- Create Flyer

A "Pick date..." dialog box is open, showing a calendar for January 2009. The date 1/6 is selected. Below the calendar, it says "Today: 12/19/2008" and has buttons for "None", "OK", and "Cancel".

Below the main interface, a "Listing Expiration: John Smith - 123 Main St - Appointment" window is open. It has a ribbon with "Appointment", "Insert", "Format Text", and "Developer" tabs. The ribbon includes "Calendar", "Delete", "Forward", "Appointment", and "Scheduling" groups. The "Appointment" group shows "Show As: Busy", "Reminder: 15 minutes", "Recurrence", "Time Zones", "Categorize", "Spelling", and "Proofing". The "Appointment" window has the following fields:

- Subject: Office Tour: John Smith - 123 Main St
- Location: []
- Start time: Tue 1/6/2009 12:00 PM [] All day event
- End time: Tue 1/6/2009 12:30 PM

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 Contacts Call Web Page Map Communicate Business Card Picture Categorize Follow Up Options Private Address Book Check Names Spelling Proofing

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

Offer Amounts	
Earnest Money	\$7,000.00
Loan Amount	\$755,000.00
Cash	\$16,000.00
Seller Financing	\$0.00
Other	\$0.00
Total	\$778,000.00
Seller Paid Closing Costs	\$0.00

Purchase Contingencies	
<input type="checkbox"/> Purchase Contingent on Appraisal	
<input type="checkbox"/> Purchase Contingent on Financing	Financing Type: None
Terms	
<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	

Contract Deadlines	
Seller Response Deadline	12/19/2008 Remind
Earnest Money Deposit	12/22/2008 Remind
Attorney Review	12/25/2008 Remind
Seller Disclosures To Buyer	12/25/2008 Remind
Inspections Deadline	1/16/2009 Remind
Appraisal Deadline	1/16/2009 Remind
Loan Denial Deadline	1/28/2009 Remind
Closing Deadline	1/30/2009 Remind
	None Remind
	None Remind
	None Remind
	None 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		
Buyer's Agent	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
Attorney	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
Appraiser	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
HOA Contact	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
Rental Company	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
Pest Inspector	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
Property Inspector	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
Property Mgt Company	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
Referring Agent	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
Title/Escrow Officer	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment
Tenant/Occupant	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	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.

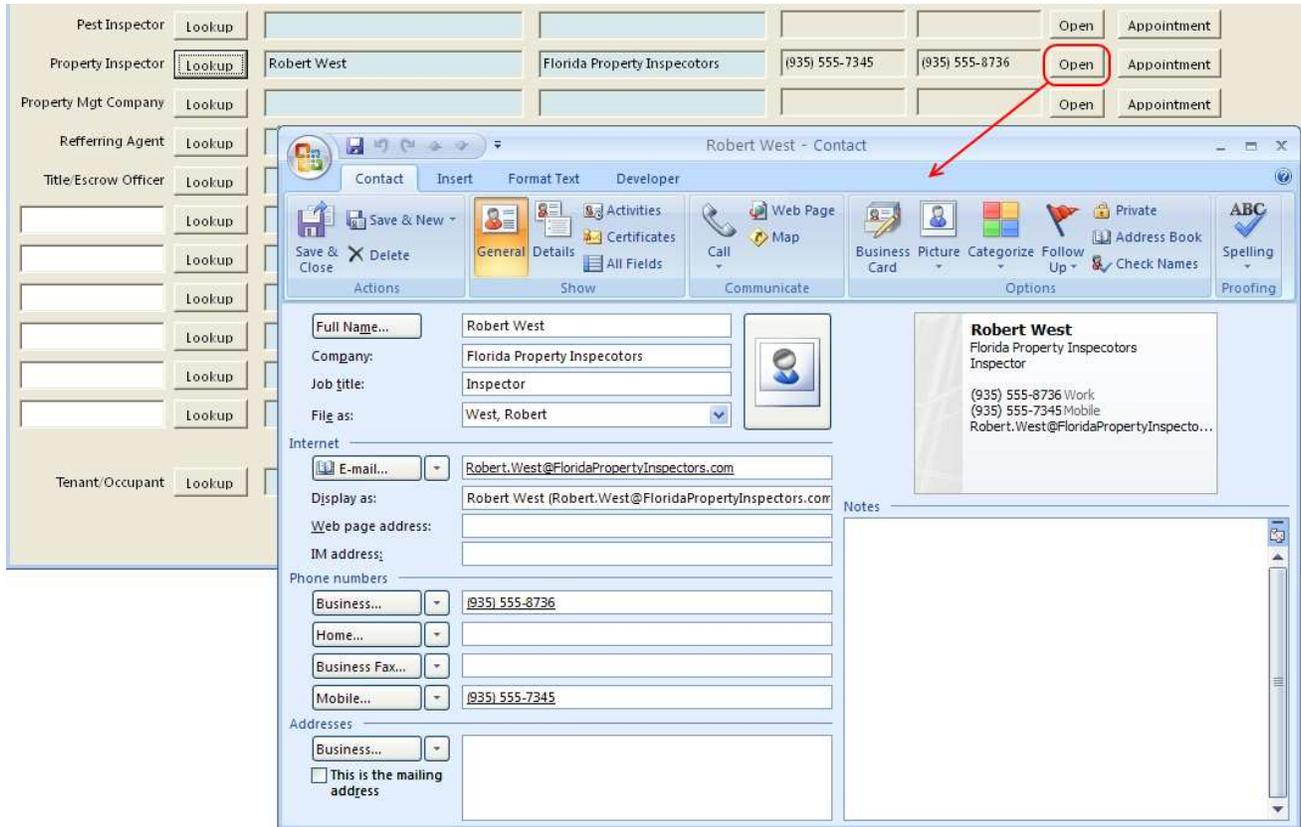
Real Estate - Contacts

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

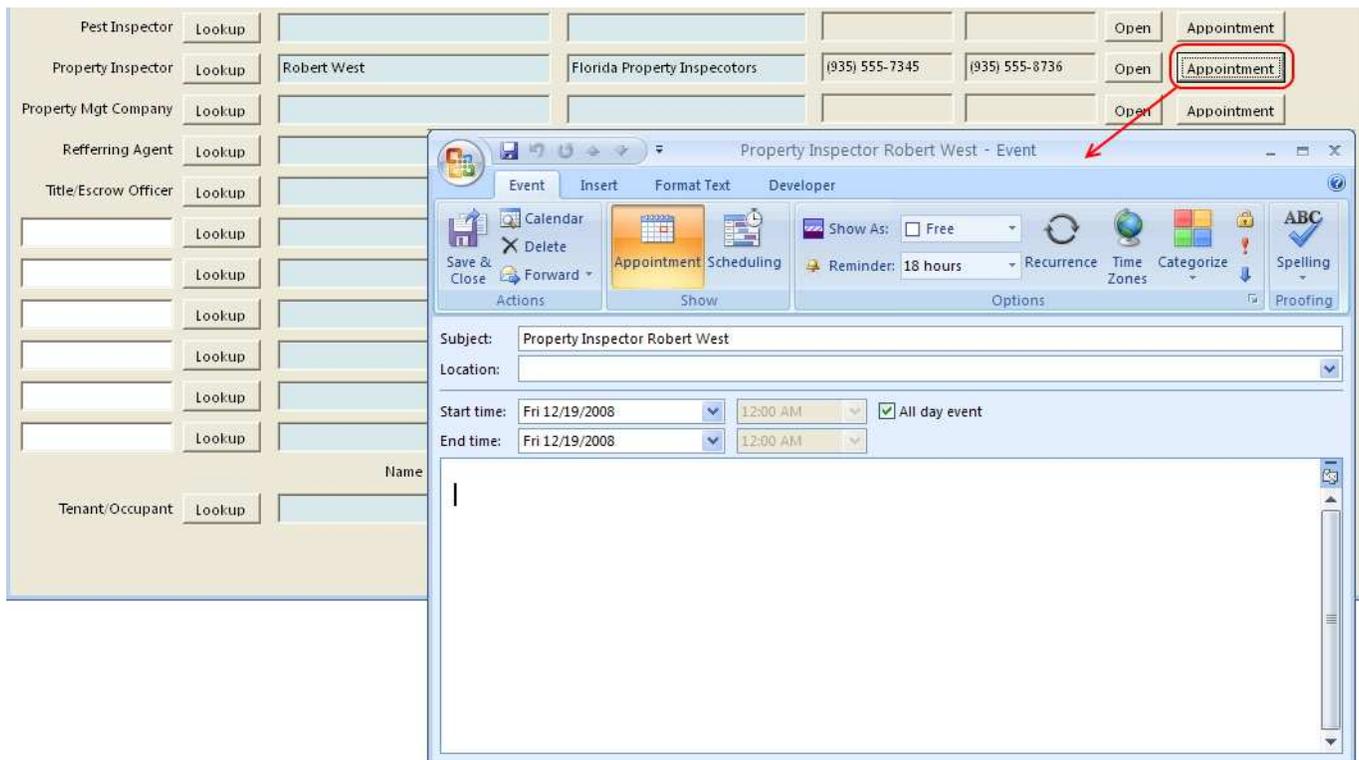
Double Click the Name with Left Mouse Button

Pest Inspector	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Open	Appointment	
Property Inspector	<input type="text"/>	Robert West	Florida Property Inspectors	(935) 555-7345	(935) 555-8736	Open	Appointment
Property Mgt Company	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	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.



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



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

Client: John Smith | Select Client | Transaction Name: Quick Start Example | Status: Requirements Definition

Description of Requirements: 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: Immediately | Price Min/Max: \$1,500,000.00 / \$2,500,000.00 | Bedroom: 4 or More

City/State: Sunny | FL | Sq Ft Min/Max: 0 / 0 | Bath: 6 or More

Area: 01 - Old Town | Type: Single Family | Garage: 4 or More

Lot Size: 1 | Acre | Style: | Age: 1 to 5 Years Old

Interior Features	Exterior Features	Lot Features	Community Amenities
<input checked="" type="checkbox"/> Air Conditioning	<input checked="" type="checkbox"/> Pool	<input type="checkbox"/> Corner Lot	<input checked="" type="checkbox"/> Club House
<input checked="" type="checkbox"/> Formal Dining	<input type="checkbox"/> Spa/Hot Tub	<input type="checkbox"/> Golf Course Lot	<input type="checkbox"/> Pool
<input checked="" type="checkbox"/> Family Room	<input type="checkbox"/> Log Construction	<input type="checkbox"/> Cul-de-sac Lot	<input type="checkbox"/> Tennis
<input checked="" type="checkbox"/> Fireplace	<input type="checkbox"/> Brick Construction	<input type="checkbox"/> Level Lot	<input type="checkbox"/> Golf
<input type="checkbox"/> Main Floor Master	<input type="checkbox"/> Metal Roof	<input checked="" type="checkbox"/> Wooded	<input checked="" type="checkbox"/> Gated Community
<input checked="" type="checkbox"/> Den/Office	<input type="checkbox"/> Barn/Horse Facilities	<input type="checkbox"/> View: []	<input type="checkbox"/> School []
[]	2nd Detached 6 Car Garage	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]

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 two input fields at the top of the page. The first field is labeled 'Client' and contains the text 'John Smith'. To its right is a button labeled 'Select Client'. The second field is labeled 'Transaction Name' and contains the text 'Quick Start Example'. Both fields and the button are enclosed in a red rectangular border.

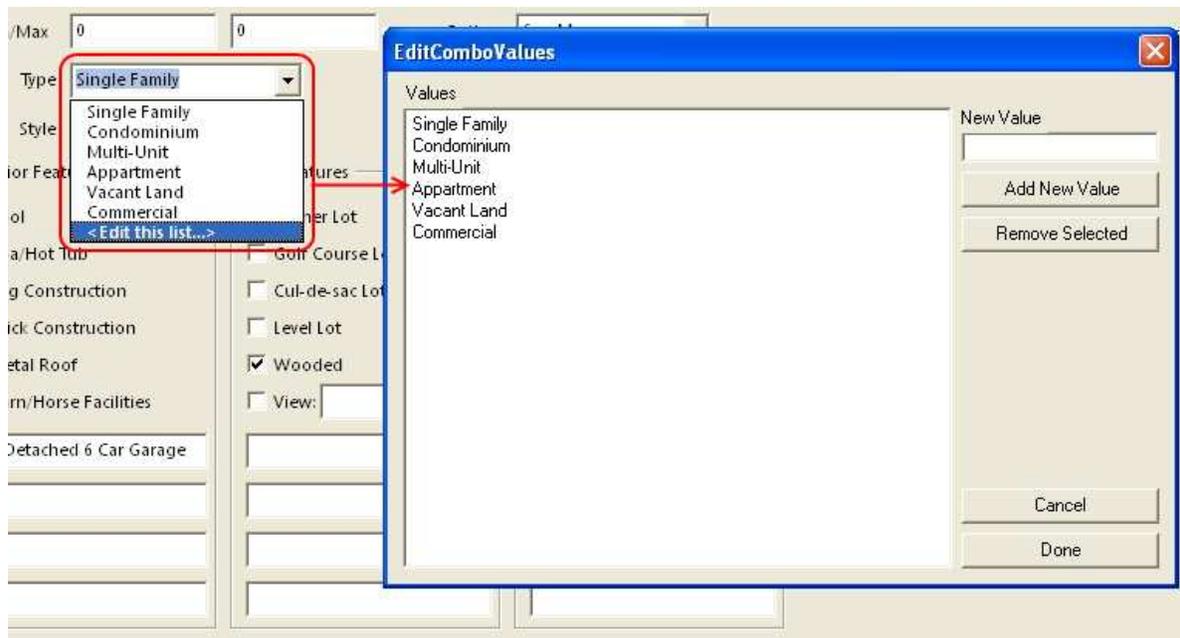
The Purchase Form is associated back to the client by the client name. If you create the Purchase form from the “New Purchase” button in the Client Form, then the Client’s Name is automatically filled in for you and a relationship established between that client and this purchase transaction. If you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

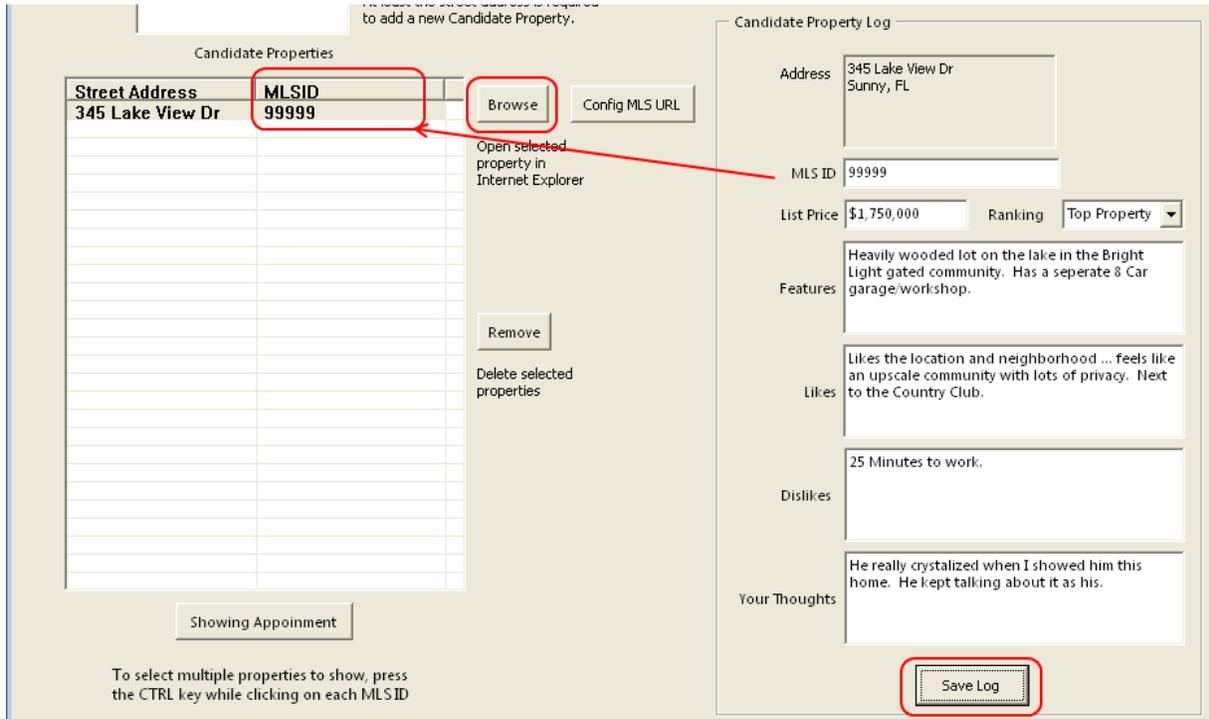
None the remaining fields on the Page are required ... so, you can decide whether to fill them in or not.

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.

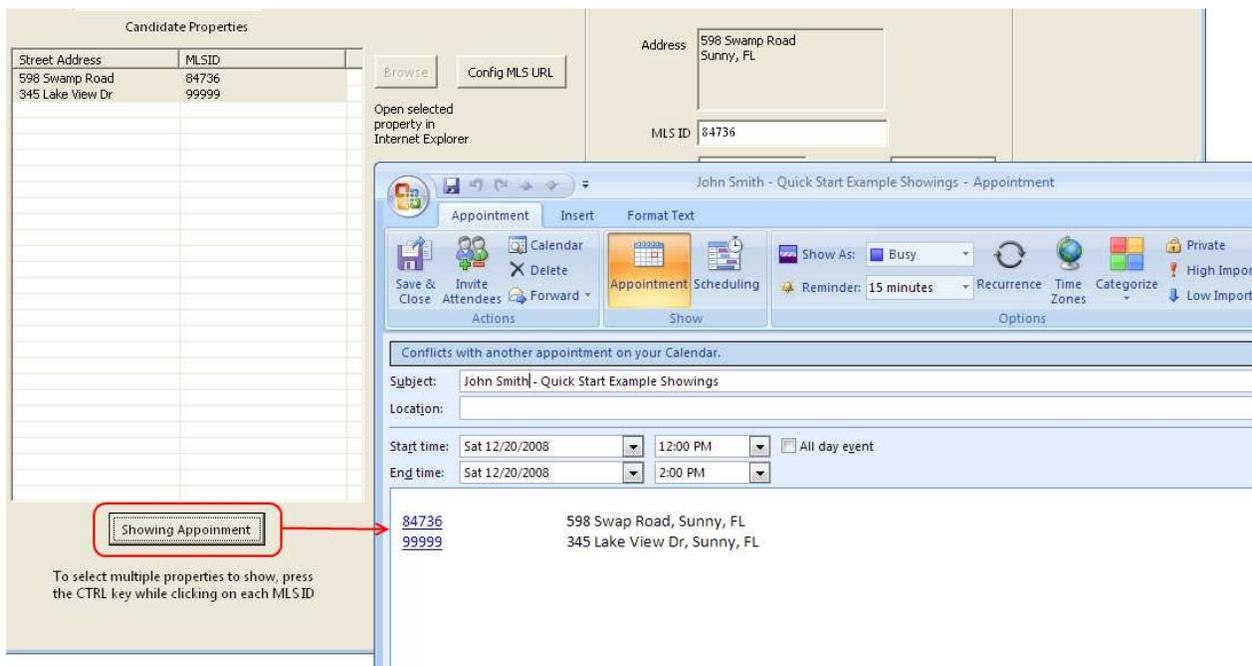


2. Once you've added the property, you can log the information on the property. Click the "Save Log" to save the information. Notice that if you enter an MLS ID, that ID is placed next to Candidate Property address. If there is an MLS ID, you can press the "Browse" button to open the property on Realtor.com. 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:

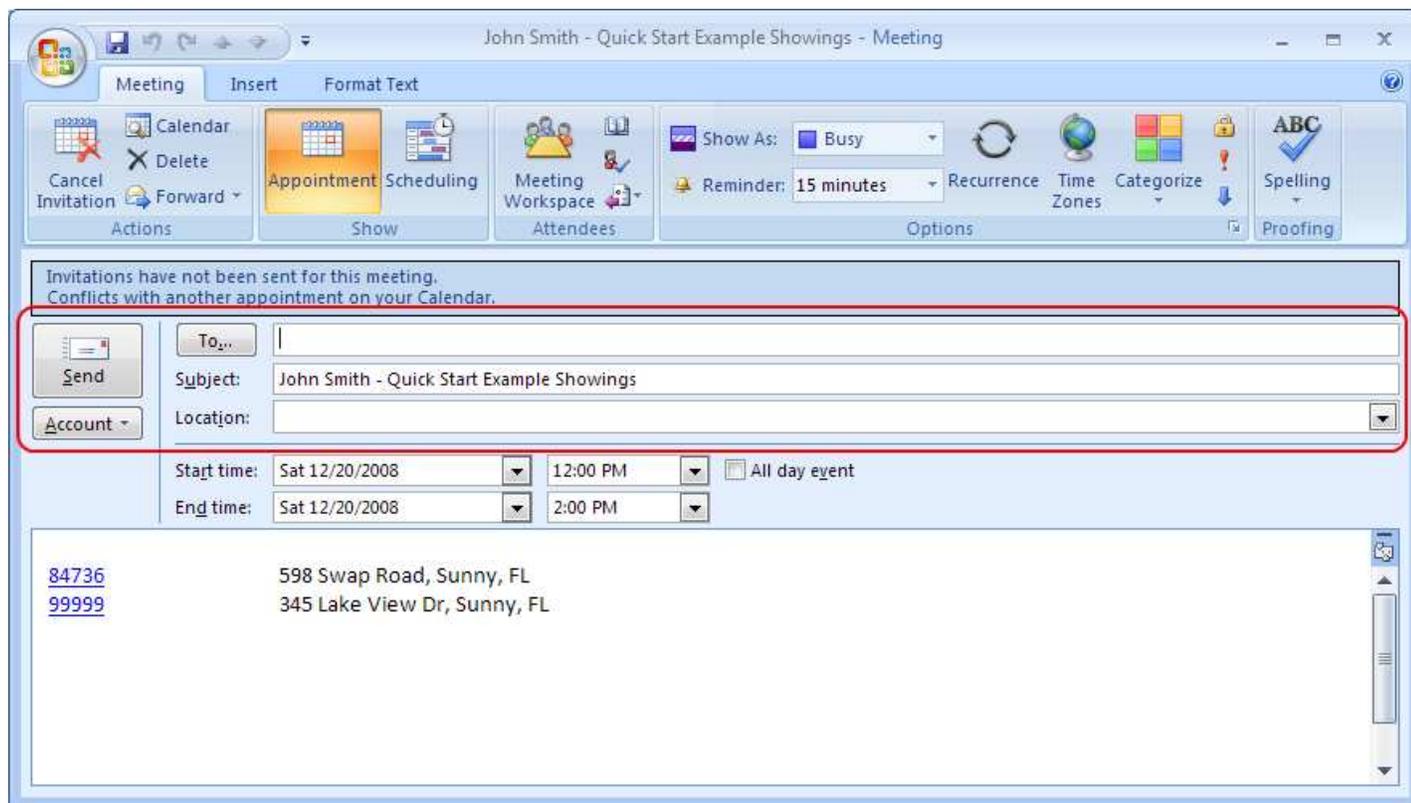
<http://www.realtor.com/search/searchresults.aspx?mlsid={0}>



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 Smith Quick Start Example - RECMPurchase

RECMPurchase Insert Format Text Developer

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

Offered Purchase Price % Off List Offer Status

Property Details | Contract Details

Address... List Price Area Subdivision

General Details

MLS ID Tax ID Taxes Tax Year Type

Sq Ft SqFt Source Lot Size Year Built Style

Garage Additional Parking HOA Dues Frequency

Room Details

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 Laundry

Other

Tenant Occupied

Nightly Rentals Allowed

Pet Restrictions

Assessment Amount: 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 information:

- Property Details:** Address: 345 Lake View Dr, Sunny, FL; List Price: \$1,750,000.00; Area: 01 - Old Town; Subdivision: [Empty]
- 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: [Empty]; 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: [Checked]; Nightly Rentals Allowed: [Checked]; Pet Restrictions: [Checked]; Assessment Amount: \$0.00; Purpose: [Empty]; Other Restrictions: [Empty]

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 information:

- 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: [Checked]; Purchase Contingent on Financing: [Checked]; Financing Type: Conventional; Terms: 6.5% Jumbo Loan; Buyer Approval of Seller Disclosures: [Checked]; Buyer Approval of Physical Property Condition: [Checked]; Ability to Obtain Home Owners Insurance: [Checked]
- 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:** [Empty]
- Includes the following:** [Empty]
- Excludes the following:** [Empty]

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.

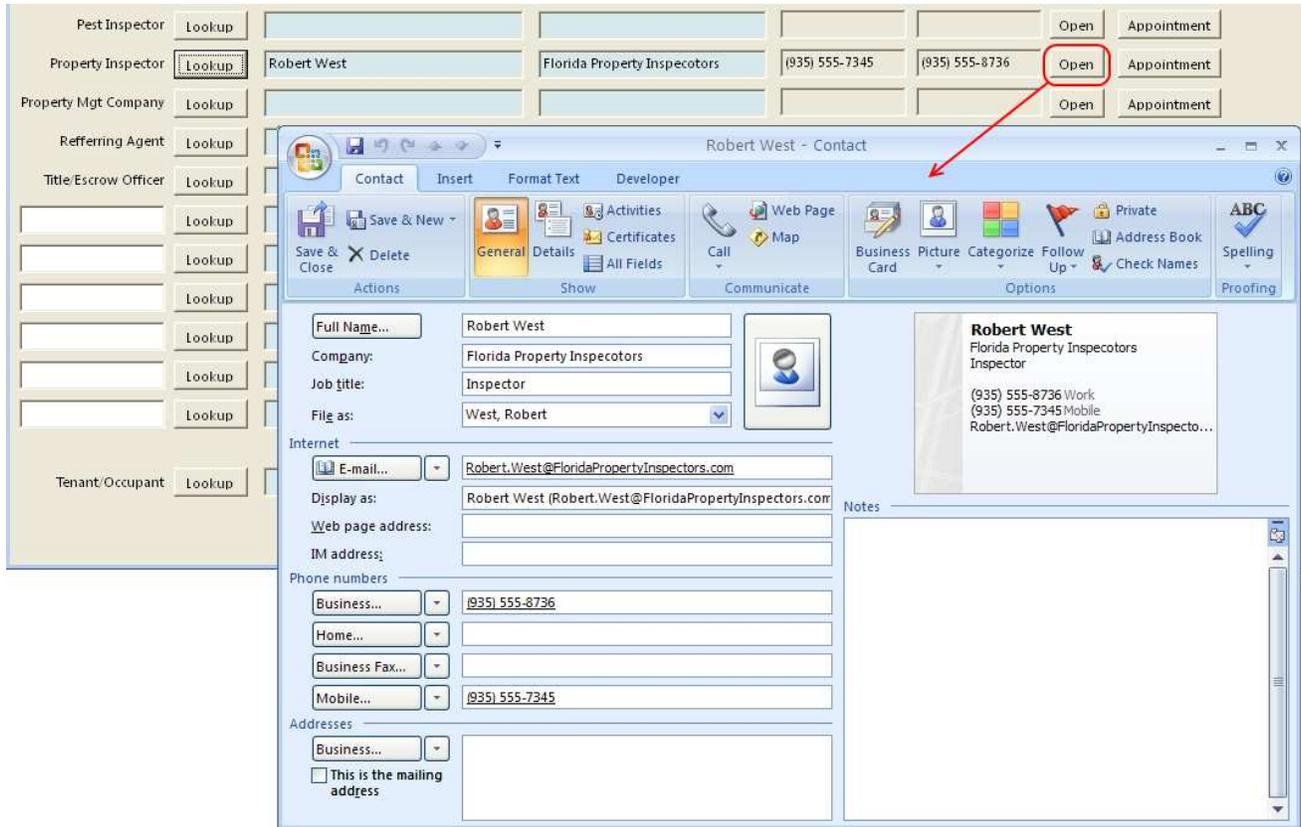
	Name	Company	Cell	Work		
Seller's Agent	Lookup				Open	Appointment
Attorney	Lookup				Open	Appointment
Appraiser	Lookup				Open	Appointment
HOA Contact	Lookup				Open	Appointment
Rental Company	Lookup				Open	Appointment
Pest Inspector	Lookup				Open	Appointment
Property Inspector	Lookup				Open	Appointment
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.

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.



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

