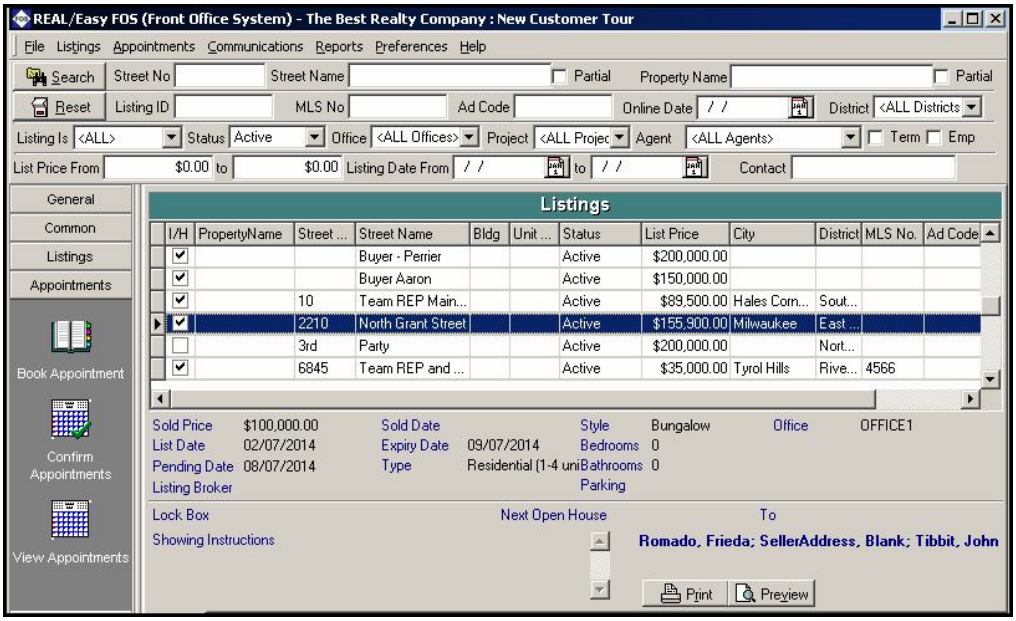
Beginners Tour of FOS



REAL/Easy BOS Version 17

Beginners Tour of REAL/Easy Front Office System FOS

This reference provides a tour of the FOS system including, maintaining buyers and buyer activity, listings, and managing of appointments (scheduling, emailing confirmations and other task, followup).

1-800-732-5327

Welcome to the FOS Beginners Tour.

FOS, or Front Office System is an integrated part of the management software offered by REAL/Easy. FOS is used by our customers

- to maintain listing information,
- to maintain and report listing activity,
- handle listing coordination including task scheduling
- to store documents and information
- to do appointment scheduling and management including confirmation emailing and followup

In this tour you will learn:

1. How to look up information in FOS such as listing and showing.
2. How to print reports such as listing sheets and appointments.

The tour is done using a small practice company called Best Realty. By using Best Realty, you do not have to worry about making a mistake because it is not your data. Also you don't have to worry about how to enter data because, with Best Realty, the data is already there. Thus, you can then learn quickly how to look up information and print reports. Call the HelpLine you need help switching to the Best database.

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REAL/Easy FOS Tour

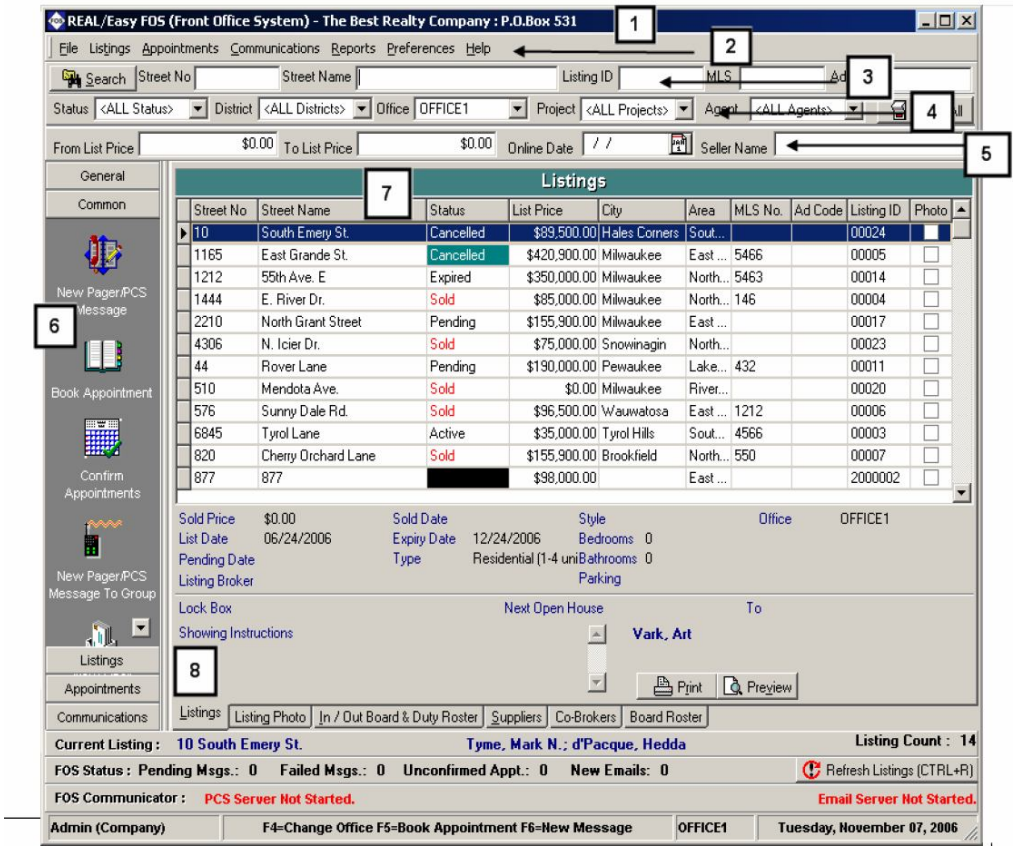
Step 1 — Start FOS and Log In

- Now, you are ready to do the tour, you are switched to the Best Realty database for the time being. Select the "**FOS**" icon (above) from your Windows desktop.

- You should obtain the above login screen.

  For now, You do not need a password, Click: 

The FOS Desktop



Whenever you begin your FOS session, you will be greeted with the above desktop. The main goal of FOS is to enable complete no-paper automation of your office's phone traffic. So, this desktop is designed to help a call coordinator or duty desk agent *quickly* access the common tasks needed with a single click.

Other tasks such as listing data entry can be accessed in a similar fashion as in the Back Office System (BOS) using menus and tools.

There are seven areas or components making up the FOS Desktop. Let's take a look at them.

1. At the top, the **title bar** shows the name of the program and version. The name of the company is displayed, according to the database you are switched to – e.g. The Best Realty Company.

2. Next, the (File) **menu bar** displayed above, is the same all the time. Setups and most operations in FOS can be run from the menu bar.

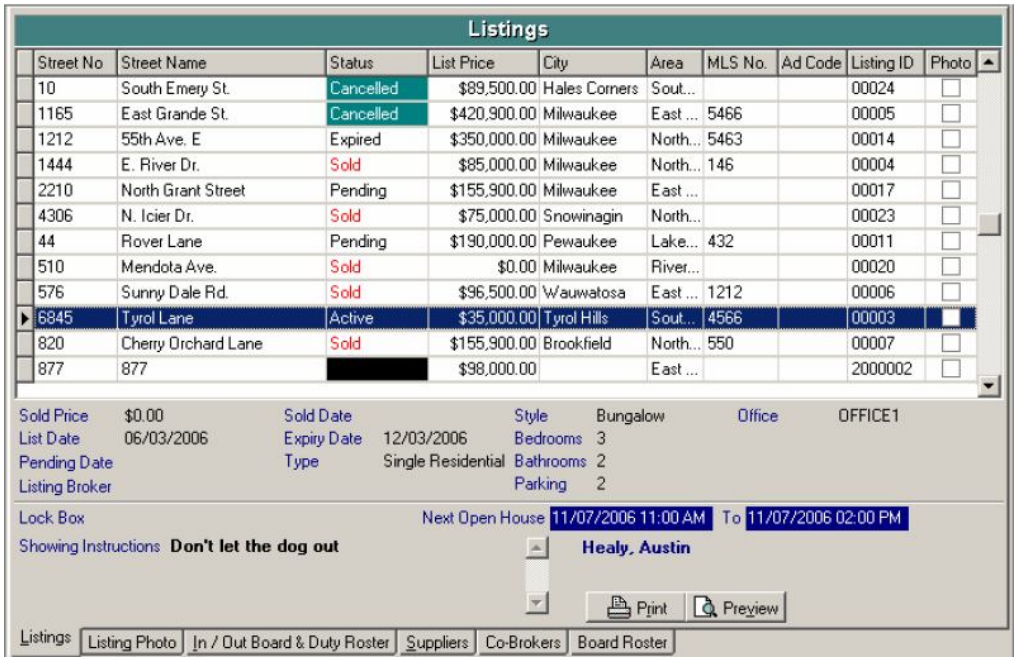
3. The **Listing Search** tool bar. You can search the listing table by street name, or MLS number or by Ad Code. Criteria entered here controls the properties to be displayed in the property browse area #6.

4. The property browse area data display can also be controlled by setting different **Listing Filters** to control the display. Here only a certain market area, or district, may be desired.

5. The last browse bar includes List price filtering and Agent filter. The Online Date filter is used when importing data from other sources such as Crest Edg.

6. This is the quick and easy to use tool bar. A majority of your work will be done from here. It does not contain all that is available from the Menu Bar (1.), but most of it.

Note: The different areas - General, Common, Listings, Appointments and Communications.



7. This is the **Property Browse**, or main information area of the FOS Desktop. The information displayed is dependant upon the tab that you click on

8. This status area show the listing highlighted above. Also listing count, and message and appointment stats.

Now let's take a look at a few of these items on the desktop.

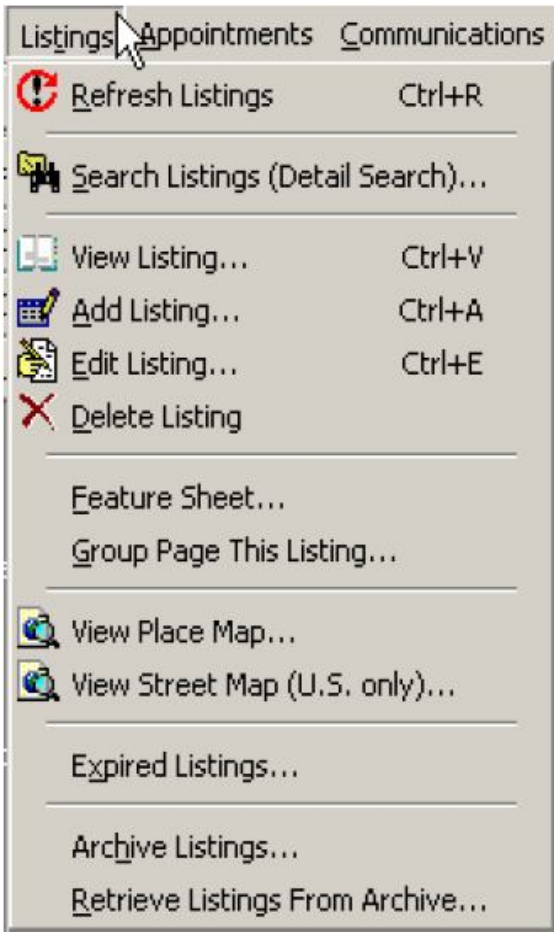
Step 1—The Menu Bar

The menu bar is like any other menu bar in a Windows program. There are drop-down items for each category.

- Click on **File**

Above are the key setup functions. First, you setup your company information, then enter all of the agent, broker and other contacts that you will be needing for the call/duty desk.

Next, Click on **Listings**

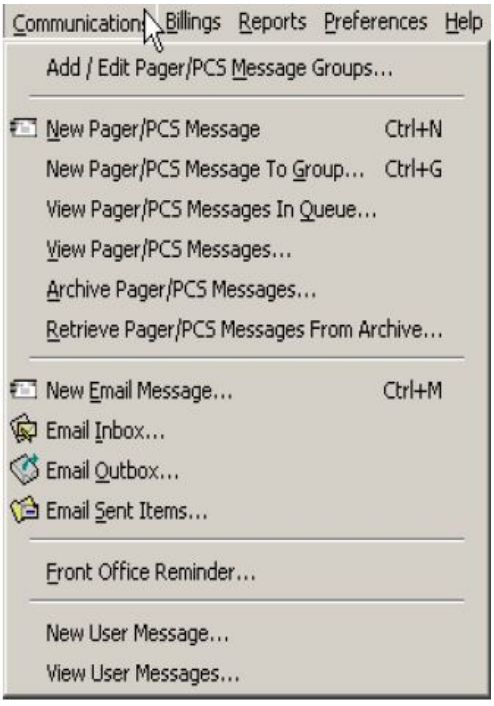


The listings tab above has all the functions needed to keep your listing inventory data up to date. If you have internet access while viewing a listing, there options to display and print maps from well known web sites.

- Click on **Appointments**

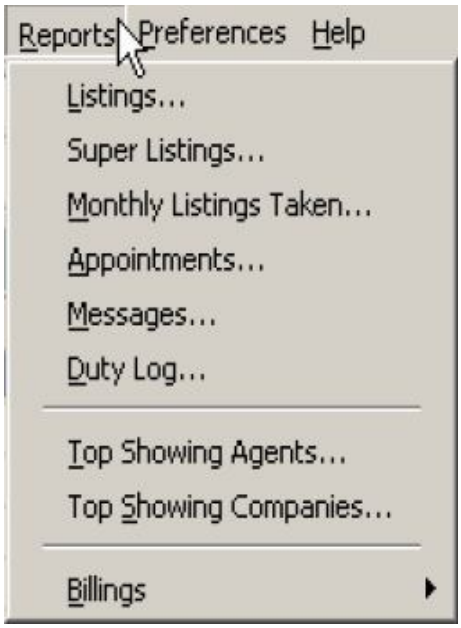
Here you can maintain and view all appointment details.

- Click **Communications.**



These functions are used to setup your PC message, pager and email systems.

Click on **Reports**

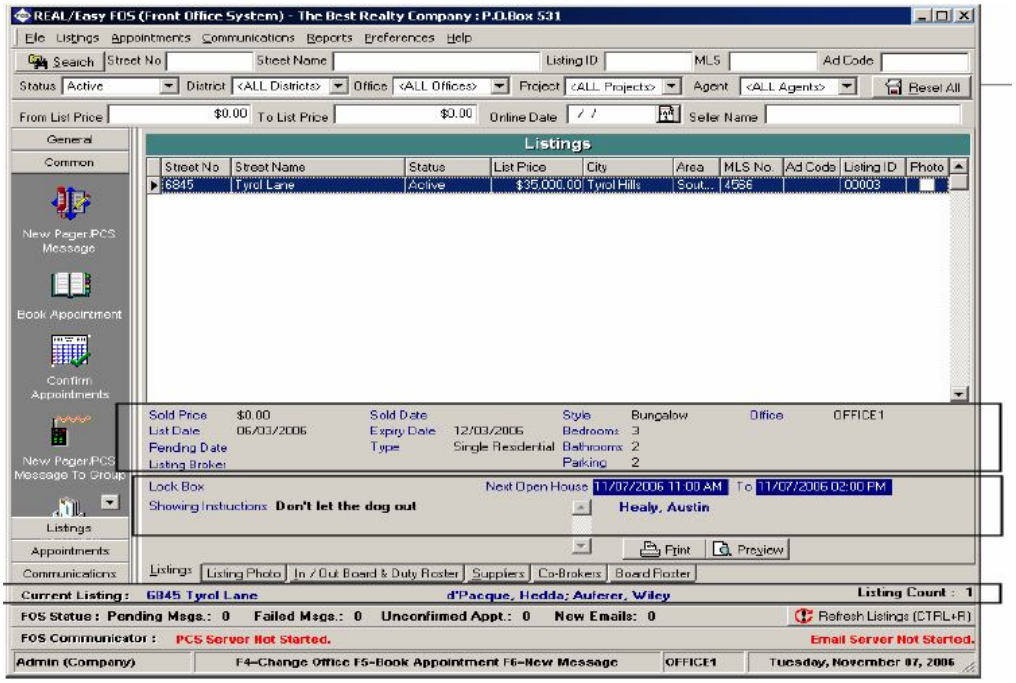


All aspects of the Front Office operation can be reported on with this tab. In addition, the "Top" reports display high activity agents and brokers

Click on **Preferences.**

Here is where you can customize your FOS appointment and tracking system. You can even change some of the screen field labels to help your agents and operators.

Step 2 — Property Browse/Main Information Area

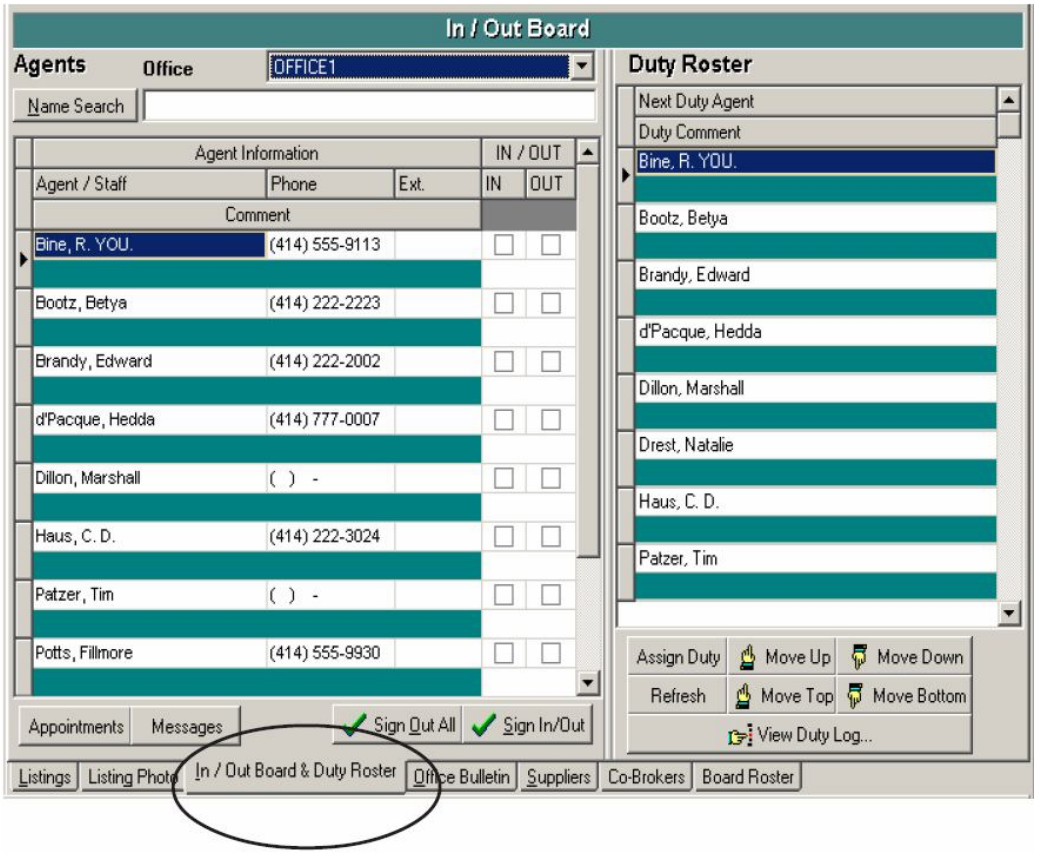


This area is showing the basic information on the listing that is highlighted above. Click on the 15th Avenue property. Note that for split listings, all agents are displayed on the Current Listing line.

Also note that key information such as list date, style, bedrooms, baths, and more is displayed right below the browse window. And the next showing information below that.

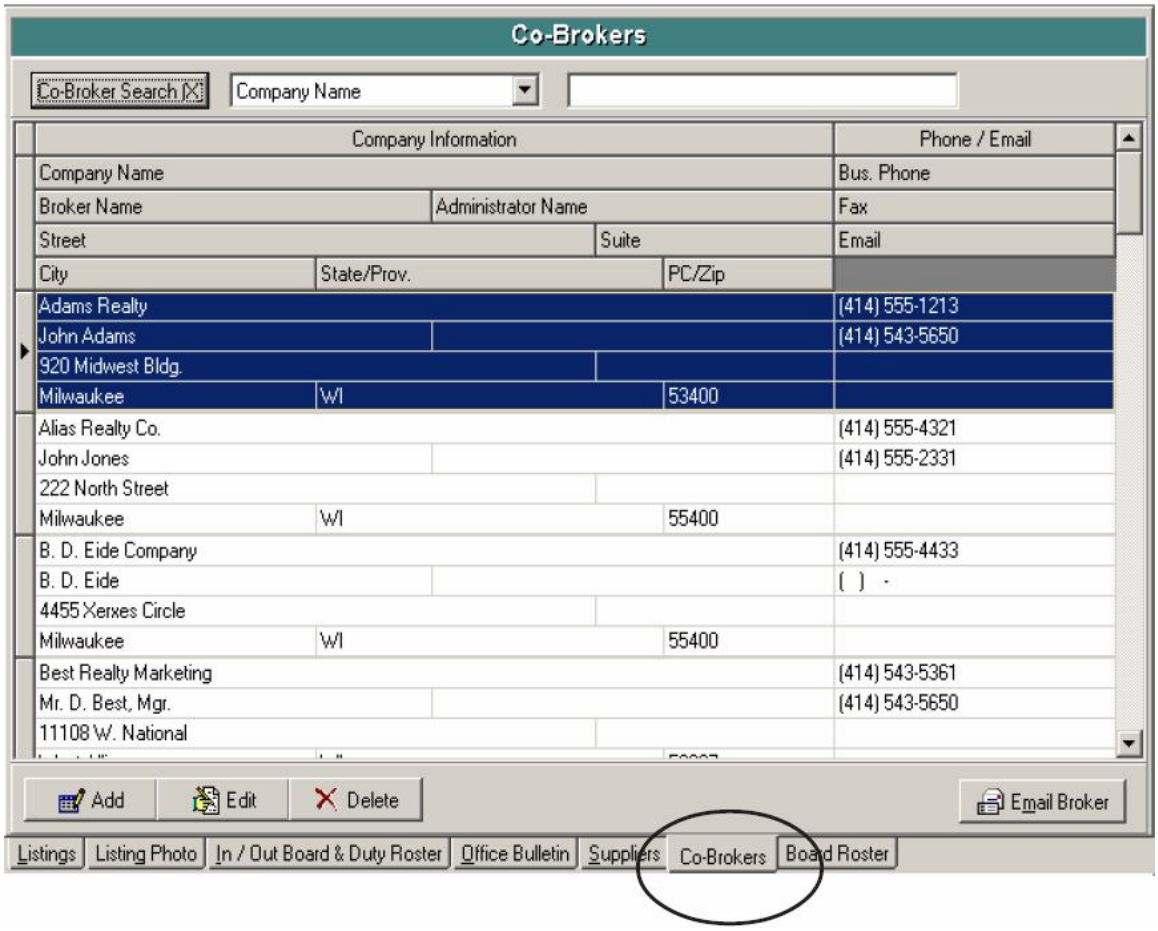
Note also the bottom tabs running below the browse area. The browse area is actually the first of many pages of information. The Photo tab provides quick access to photos of the highlighted listing. The other tabs are for general use during calls include the IN/Out Board to help direct calls to agents who are in he office, the Office bulletin to view office announcements or tips, the Suppliers tab is used to help lookup and call sign, mortgage, title and other companies, the Co-Brokers and Board Roster tabs show phone and other information to help you contact co-broker offices and agents to confirm appointments or do follow up calls.

In/Out Board & Duty Roster tab



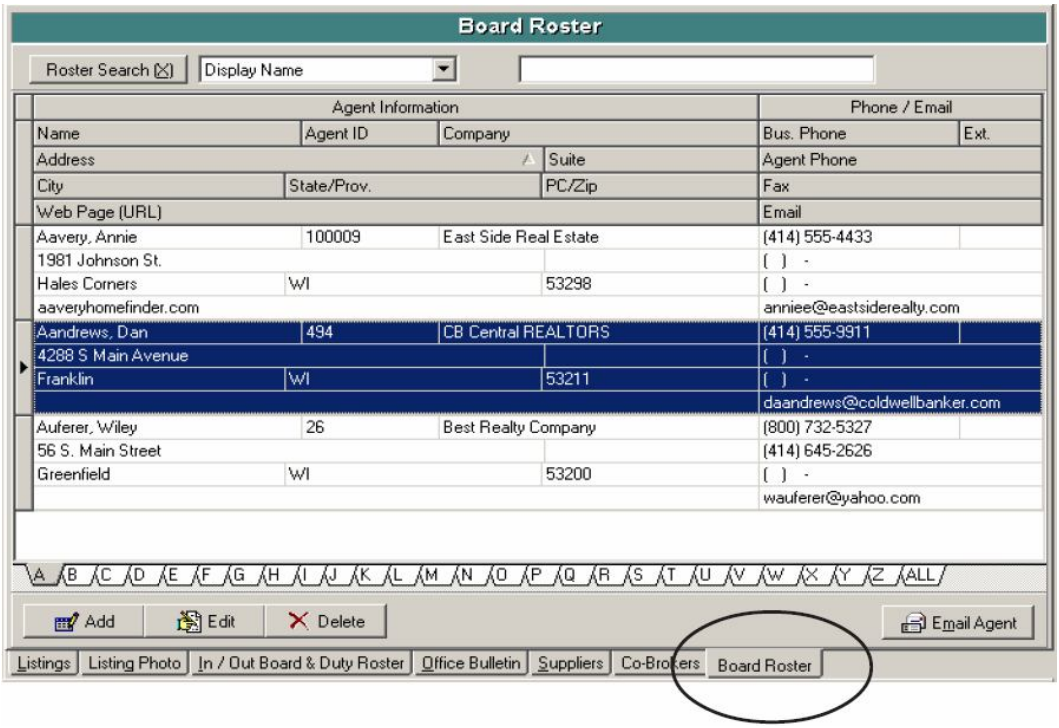
By clicking on the **In/Out Board & Duty Roster** tab you can register the daily status of agents presence, duties, appointments and messages. If this is kept up to date during the day, you'll be able to easily direct calls to them or know when to page or email messages.

Co-Broker tab

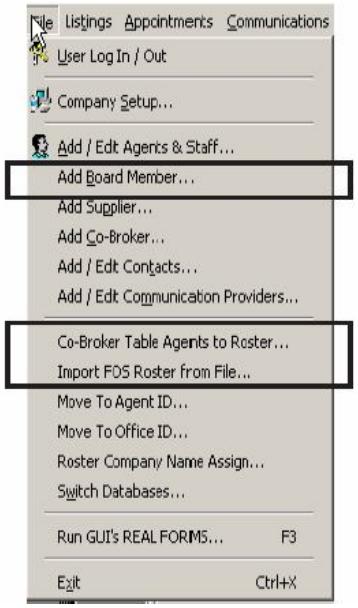


Above is the sample co-broker info tab.

Board Roster tab

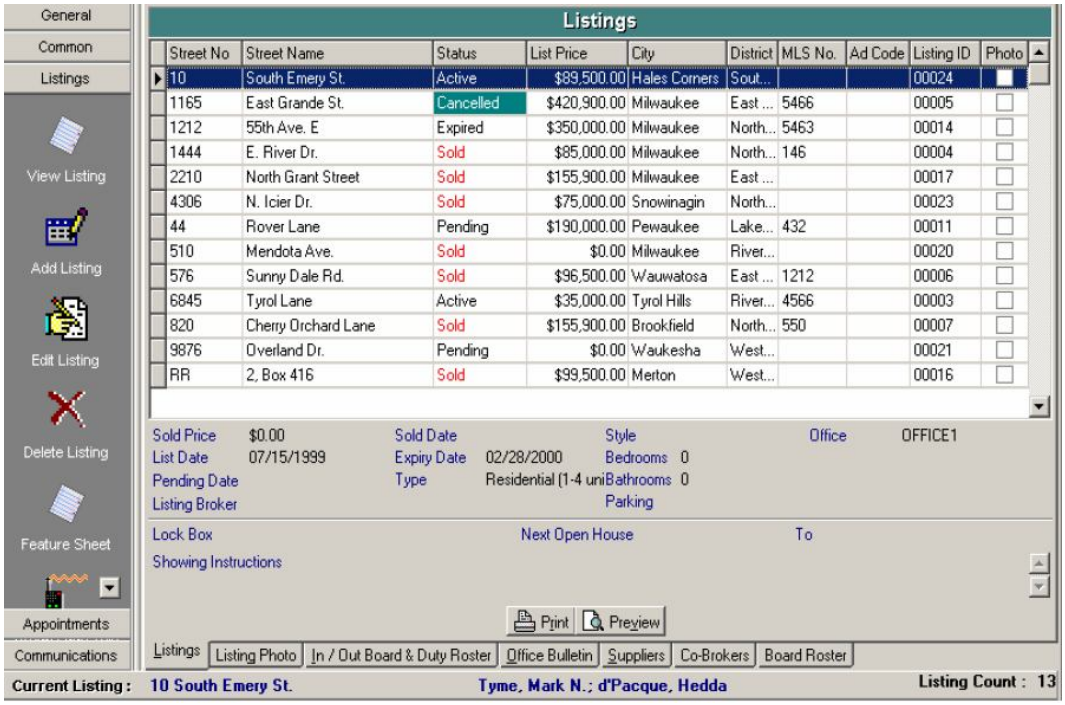


And, the Board roster will appear as above. Note that a search box above can help you quickly find a caller or agent that needs follow-up.

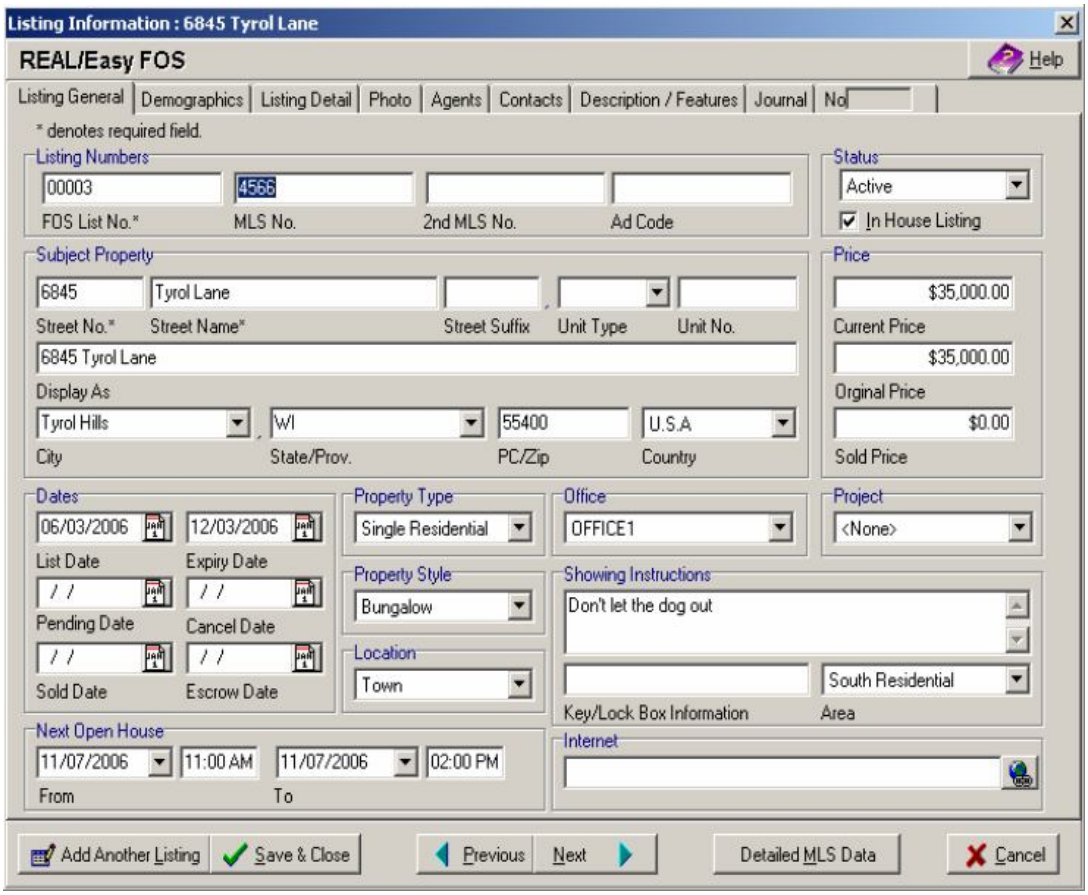


Populating this browse is accomplished by Add Board Member, importing data from your co-broker table in BOS or by importing from a comma separated text file.

Step 3 – View Details or Edit a Listing



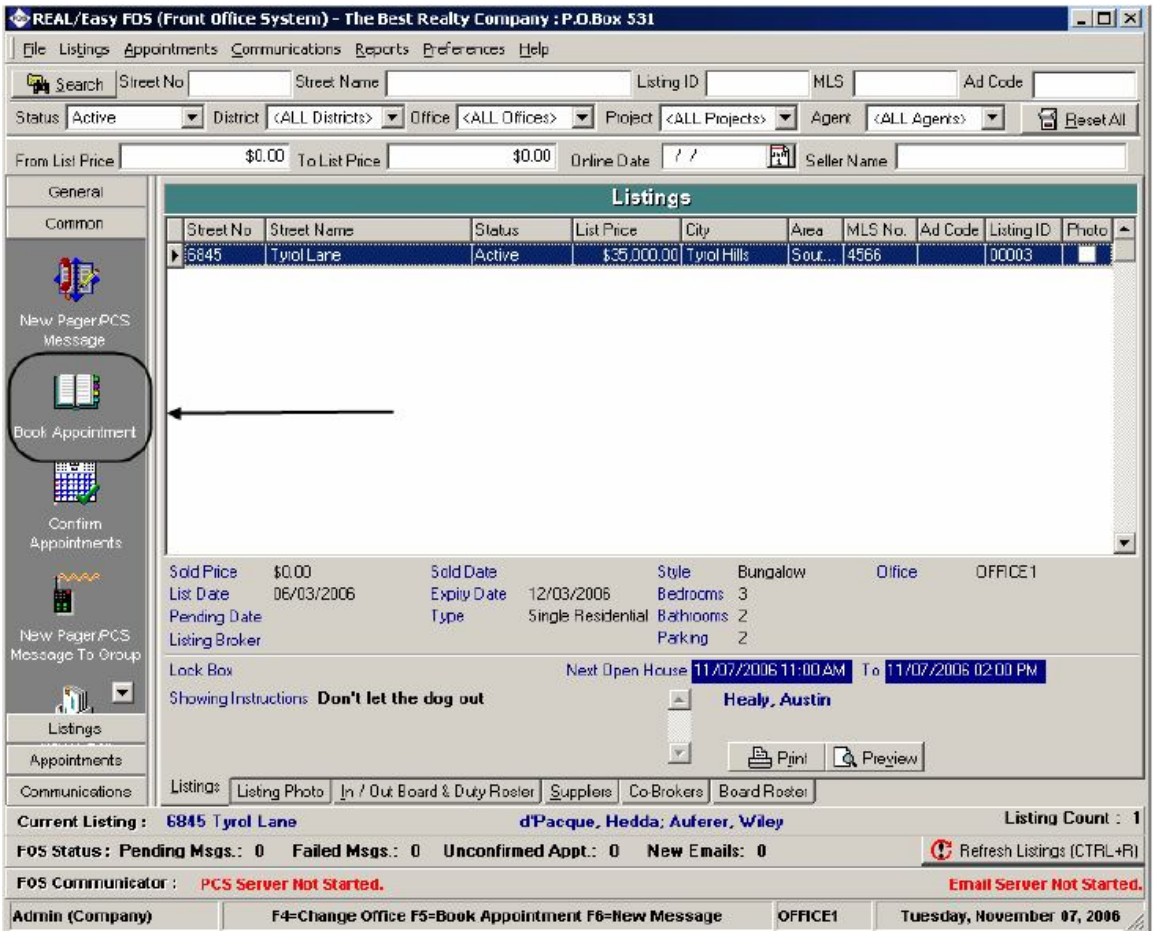
You can double-click a listing or click the **Listings** category at the left and select **Edit Listing**.



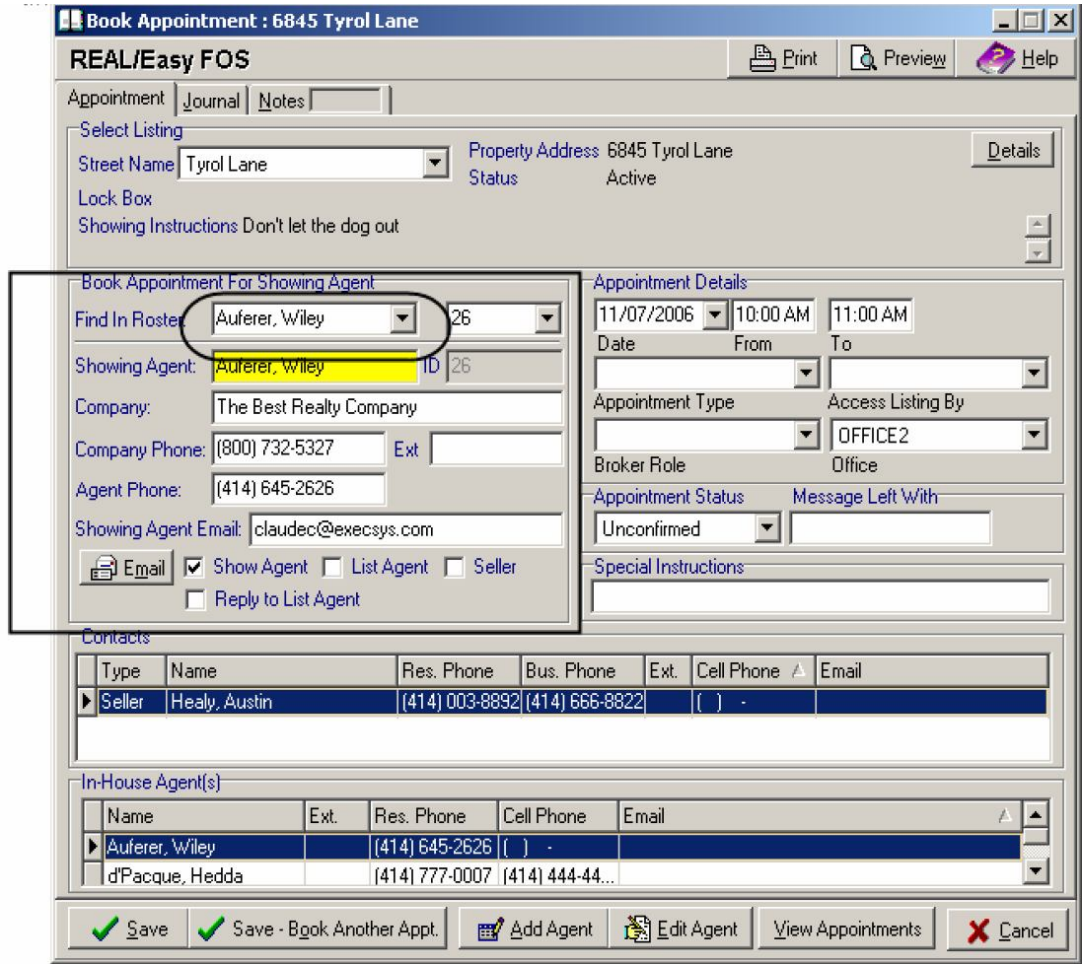
Above is the main, or “listing general” screen. Key location, price and contract date information is displayed. Showing and lockbox information is also maintained on this screen.

The tabs along the top are used to maintain more information pertaining to this listing. Included are other screens to maintain more details about features, photos of the property, the listing Agents, the seller and others under Contacts, Descriptions of the property, Advertising history, and activity Journal.

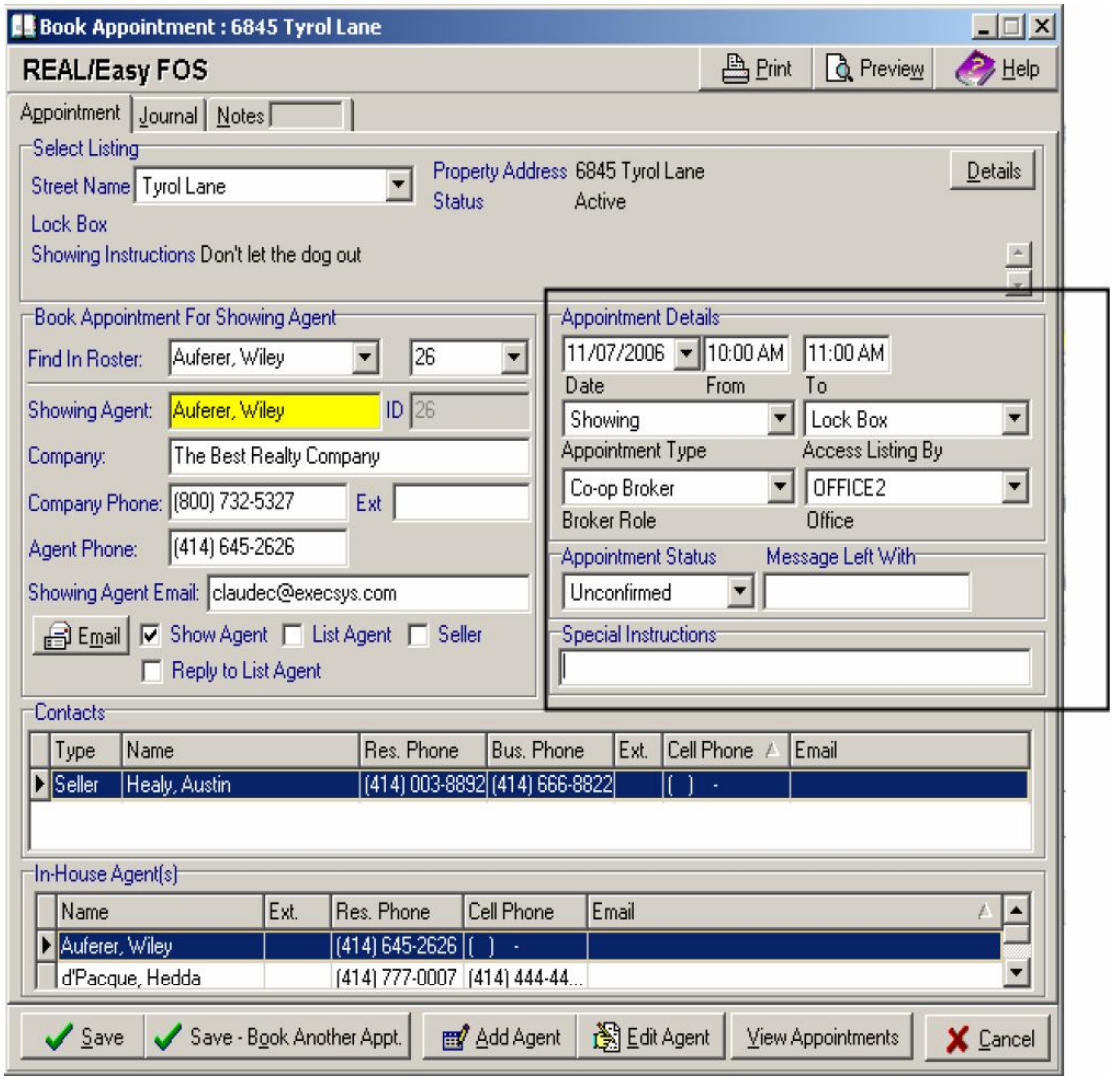
Entering a Showing Appointment



- From the main browse screen, select a listing and click on **Book Appointment**



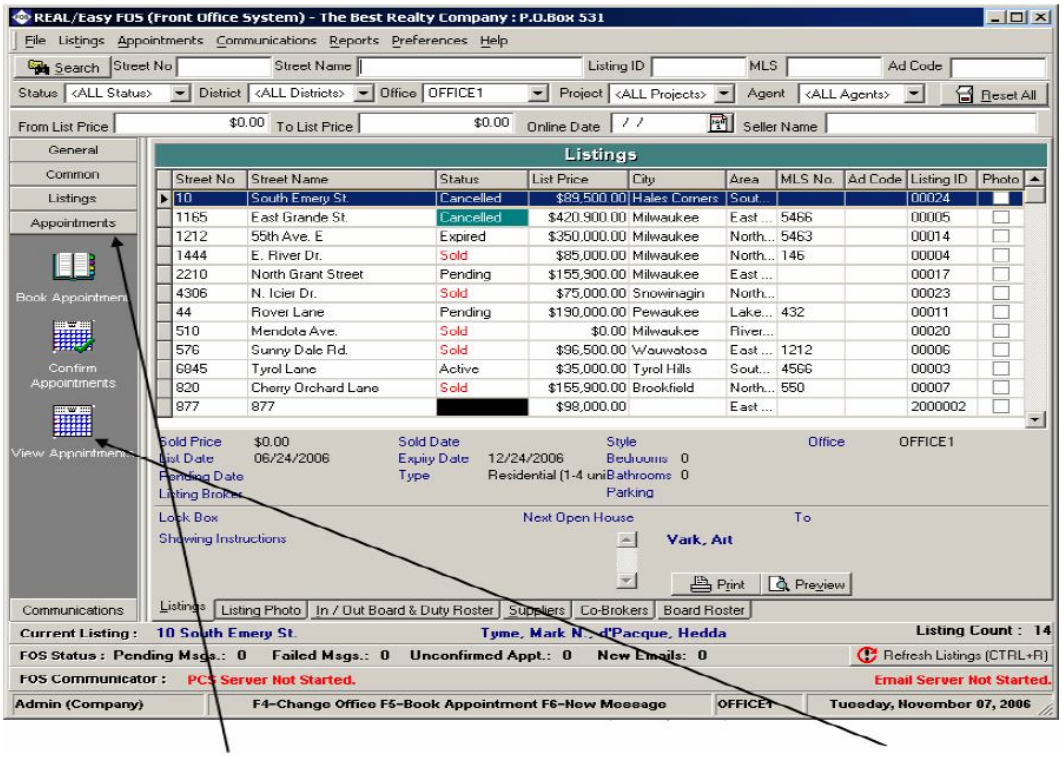
- Select the Agent you are booking the appointment for from the Agent Name field. Type the first initial of the last name and select the Agent. If you have imported outside agents into your Board Roster, they are available also. Note that the Agent's company information is filled in.



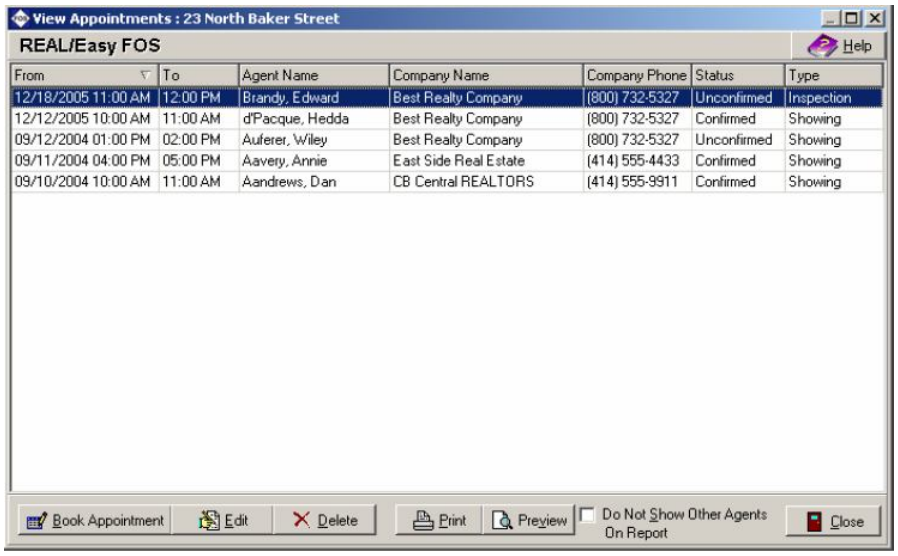
- Appointment Details include time and date, type of appointment, how to access the property and special instructions.

- Now click on Save or Save - Book Another Appt.

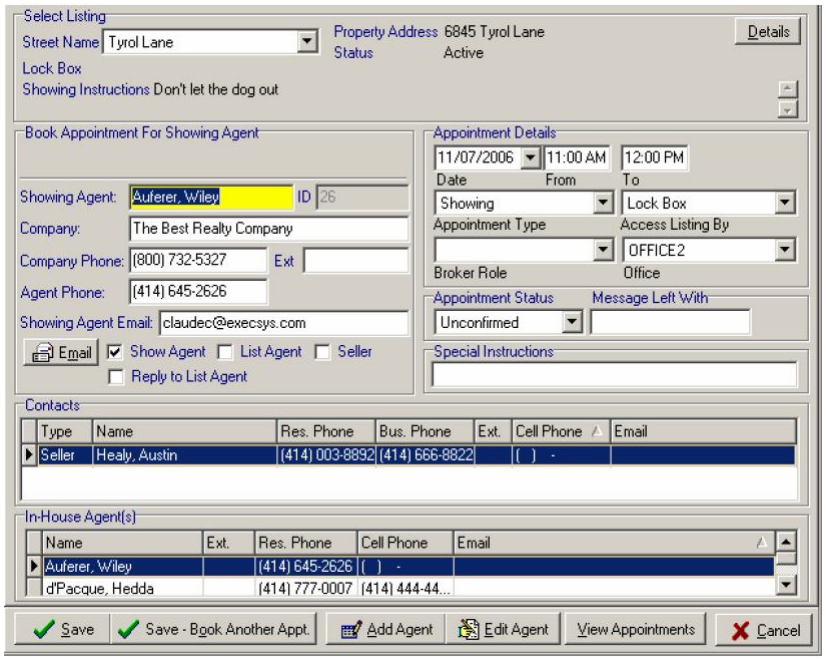
Edit Appointment



- Click on the Appointments bar at the left and the click on **View Appointments**.



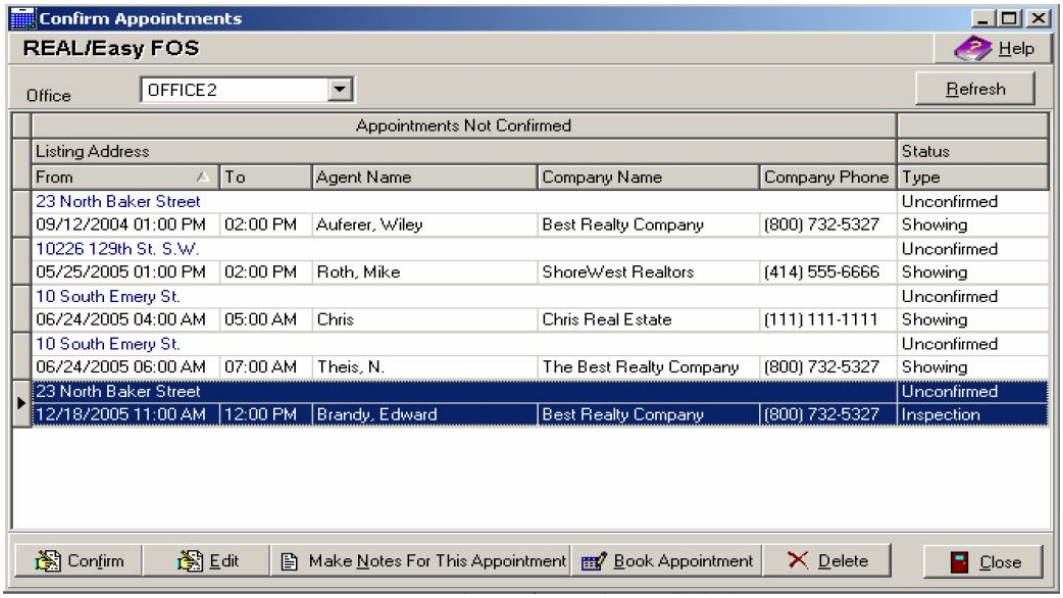
Select the appointment to edit and click **Edit**

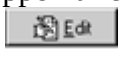


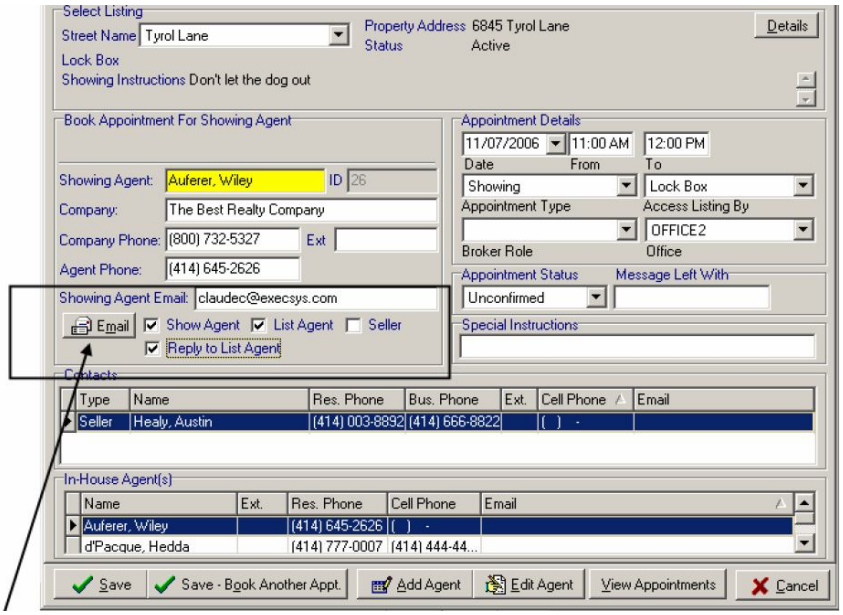
Click  when finished

Confirm and email Appointment

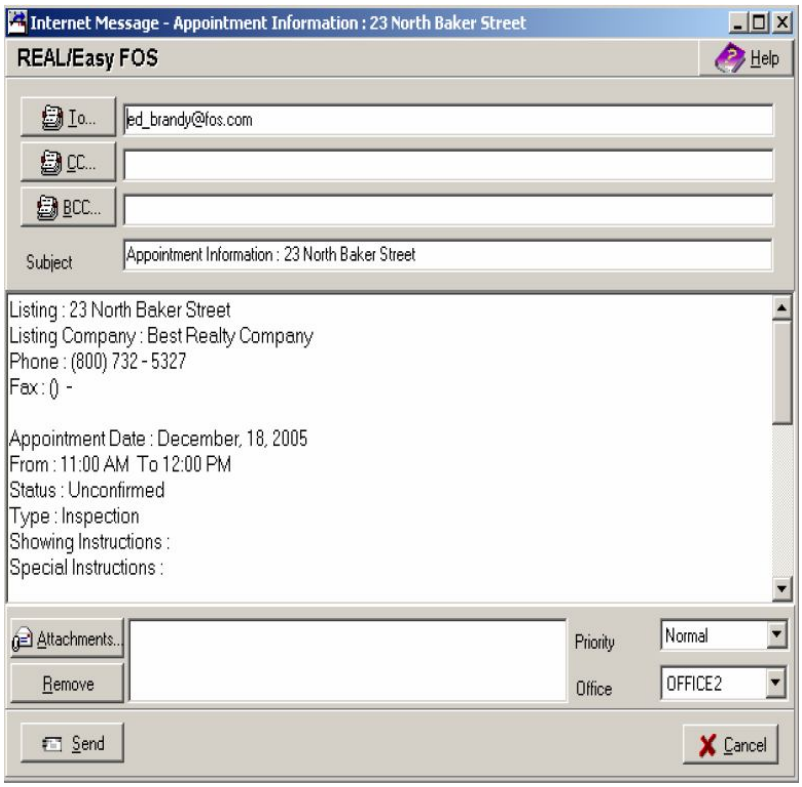
- Click on Confirm Appointment



- Click on the appointment to be confirmed. If you want to email this appointment then click on 



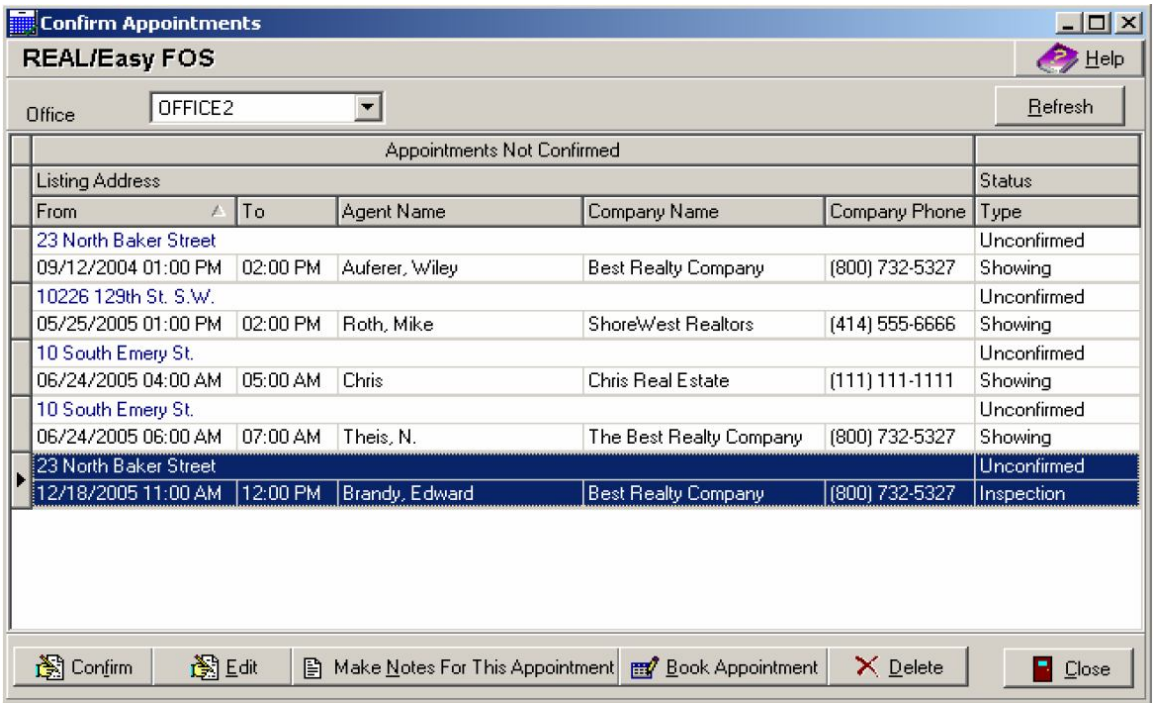
- If the email address is missing you will have to enter it here. Then click on the email icon to send.



This is what the email looks like and, of course you can edit it before sending.

Note: You must have FOS Communicator Email Server configured and running to use this feature.

After sending you can Save



- Then select the appointment again and click on 

Where Do We Go From Here

Congratulations!

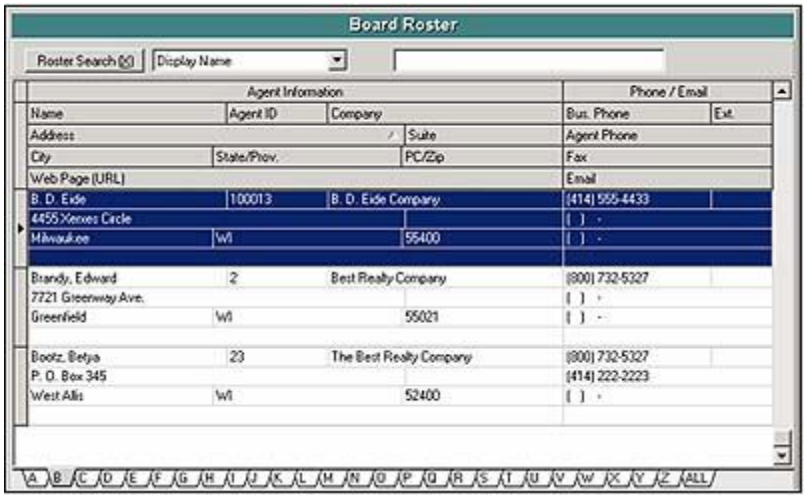
You have now completed the **Beginners Tour of FOS**. Items we covered with you include:

- Viewing and General Understanding of the FOS desktop.
- Viewing main functions of the system via the menus.
- Observing the areas where you can customize the system.
- How to lookup listings and view detailed and other information to help on co-broker and buyer calls.
- How to maintain information so that FOS can help save time and automate your call coordinator and duty desk functions.

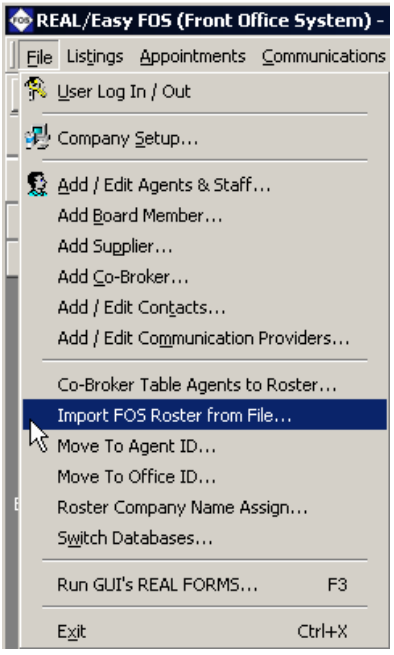
Now you are ready to start entering information into your system. You should exit the Best Realty company and switch back from \BEST to \DATA.

Then, learn how to do the required setups by following the steps in getting started part of the FOS help menu. Note further that features like paging are optional and need to be setup with your local phone and computer network technicians.

Improve Appointment Scheduling and Follow-up with the FOS Board Roster Import Program



The FOS board roster is used to indicate the appointment caller and/or co-broker agent for listing showings. To help build and maintain this roster, a new import command has been added to the FOS system.



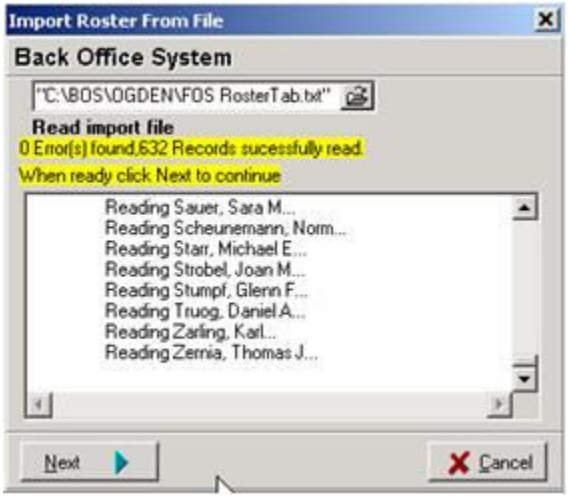
The new command, “Import FOS Roster…”, is accessed from the File pull down menu in FOS. This new command will add new records to the FOS roster table from an ASCII (character) file that is created from MS Excel or other programs that might be offered by your MLS system. This file must have a certain format which is defined later.

How to operate the Import Roster from File command:

When you start the command the above dialog is presented. There is a space to enter the import file name and a “Start Import” button that will tell the program to test read the import file.

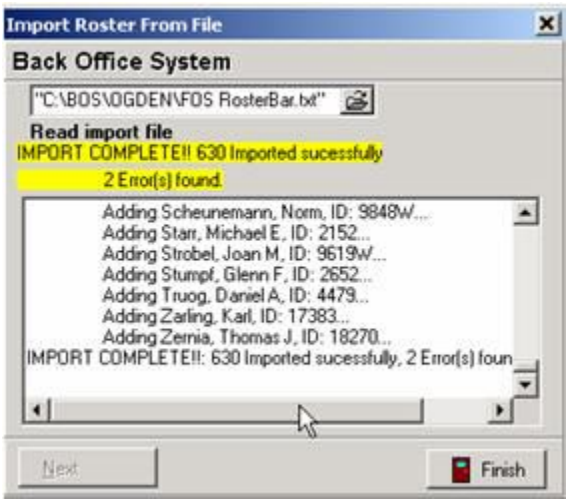
Above, use the folder tool to locate or just type in the import file name.

Next, click the Start Import button. This will tell the program to attempt to read the header and all data records of the import program and indicate if the file appears to be correctly formatted.



The above form shows a sample of a successful read of an import file. The program will show how many records it was able to read and how many format errors it found in the file. Note that a scrolling window allows viewing of each roster name read.

If the import program was able to read the import file, the operator will click the "Next" button in order to perform the import to the FOS roster. If the import program was not able to read this file, the program will suggest what the formatting problems are so they can be fixed.



Import to roster is completed – above messages will indicate how many of the agent/broker records it was able to actually add to the FOS roster. Shown for each record is the agent/broker name along with their ID. Normally, the ID is the MLS ID of the agent/broker.

If the record already exists in the FOS roster it is not added and this is indicated as an error. In the above example, 630 records were imported and 2 were not. The operator can

scroll up the record list to locate the “error’” record to view the name and ID of the record(s) not added. Most often, these will be records whose agent/broker ID was found to already be in the FOS roster.

Once the import is completed, the added agent/brokers are available for use when entering appointments.

How the Import File must be formatted:

The import file must have format that consists of a “header record” which indicates the roster items you have in your file, followed by records of agent/broker names, ID’s, and other information.

If you have a list of agent/brokers that had their MLS ID, the agent name, the agent phone number, and their company name it might look like this in Excel:

For each agent/broker there are 4 items of information.

Next, you must then create the header record so the FOS import program will know what each item is. This header record must use certain item names or the import will not proceed. The header names that are available are:

szAgentCode this is the agent/broker ID – usually the MLS ID

szName this is the agent’s name should be listed last name then first name

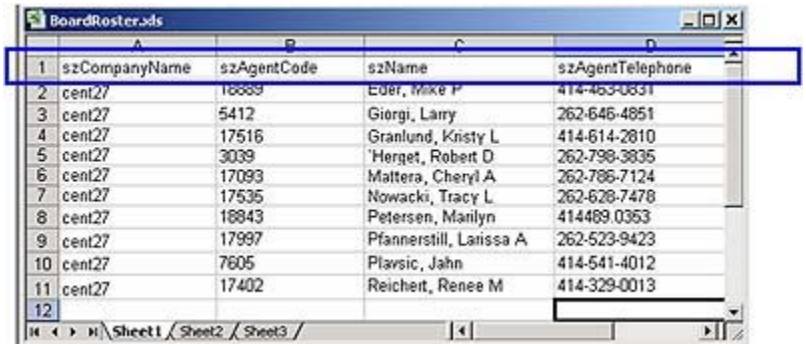
szCompanyName this is the company name of the agent. Often the company MLS ID is used for the company name

szAgentTelephone agent’s phone number – can have just numeric digits and also dashes or parenthesis

szStreet the agent’s street address – usually of the office

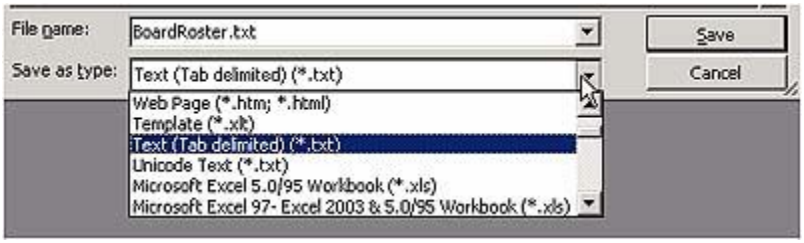
szCity	the agent's city – usually of the office
szState	the agent's state abbreviation – usually of the office
szZip	the agent's zip code – usually of the office
szEmail1	the agent's email address
szOfficeCode	the company office code where the agent works

Any import file must have the first two items – the agent code and agent name. If one of these two items is not listed in the header line, the program will not read the file and display a message. The other 8 items are optional. Phone numbers and email addresses are important to improve the usefulness of FOS for appointment confirmations and follow-up.



To setup the header record the 4-item per record example, the header row would be inserted as illustrated above in row #1.

When header and agent/broker record entry is complete, the next step is to export the data to an ASCII file. When this is done, a "delimiter" character is placed between each item (column) so that the import program knows when each item starts and ends.

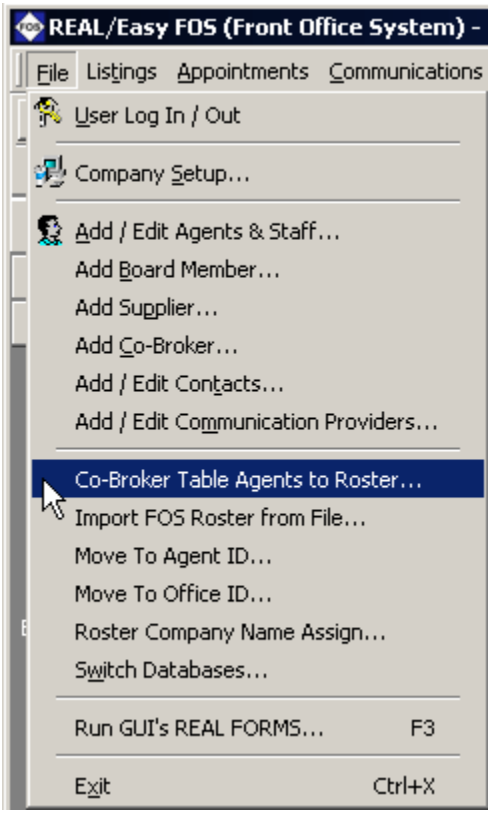


Above is an example of using Excel – File à "Save As" command to save the spreadsheet A common ASCII format is to use the tab delimited – this means that a tab character is placed in the file to separate each item.

If you were to use notepad to view this file it would appear as above. The first record is the header record. Each name in the header is separated by a tab character. The following records are the agent/broker data records – each item of each record is also separated by a tab character.

Two other characters can be used as a delimiter: the semi-colon (;), or the bar (|). Only one of the three delimiter types can be used in an import file.

BOS / FOS – New Tool to Add Brokers to FOS Roster



For companies who have been using BOS to track business with co broker companies and agents and are implementing the FOS, a time saving tool has been added to copy agents/brokers from the Co-Broker table to the FOS roster table.

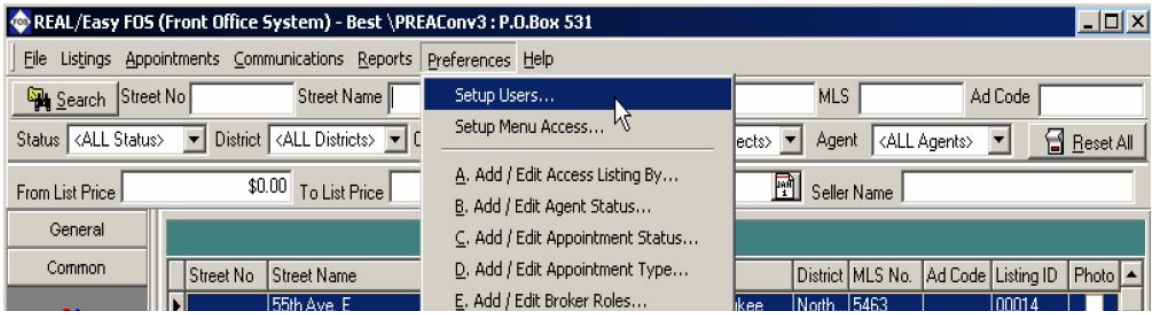
The purpose of the FOS roster table is to make it quick and easy for updesk and call coordinator operators to record showing agents when entering appointments. The above command “Co-Broker table to FOS Roster” is used to do this copy function.

The above dialog is presented. The operator can select all Broker Roles or a selected role to copy to the FOS Roster. Another choice is use either the BOS broker code or the record's MLS1 ID for the FOS roster ID. Most often the MLS for the broker or agent is used for the ID in the FOS Roster.

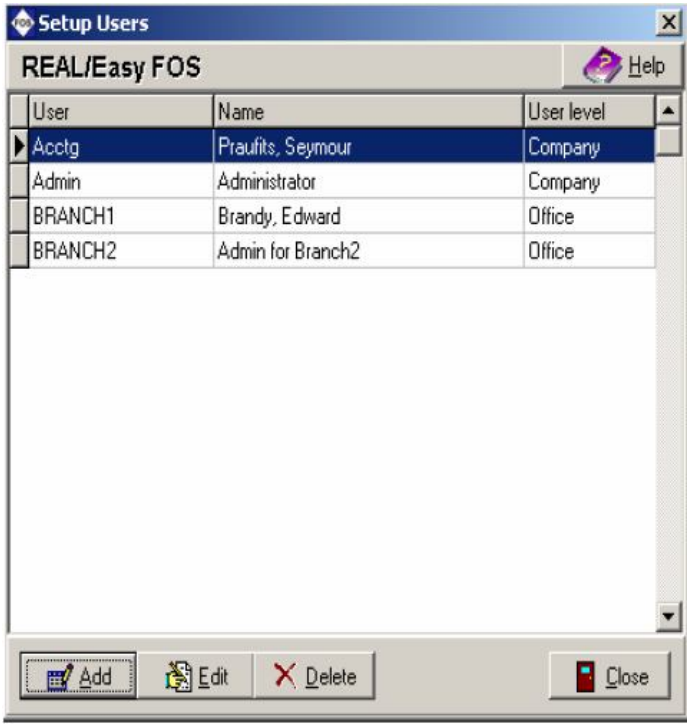
The above illustrates a copy of "Broker" type records from the Co-Broker table to the FOS Roster table.

Setup FOS Email Server

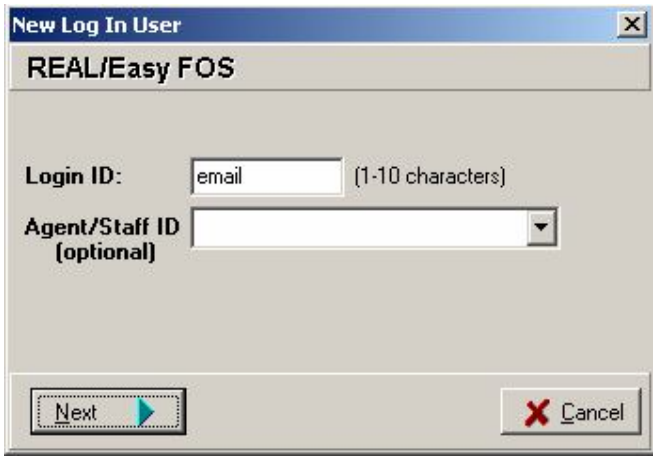
Open the REAL/Easy FOS program



Click on Preferences and Setup Users to create an email server user.

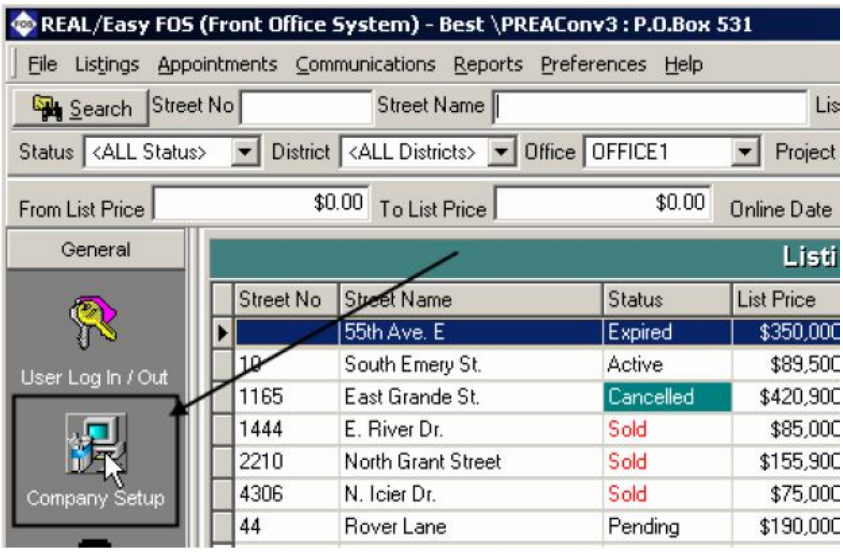


Click on Add

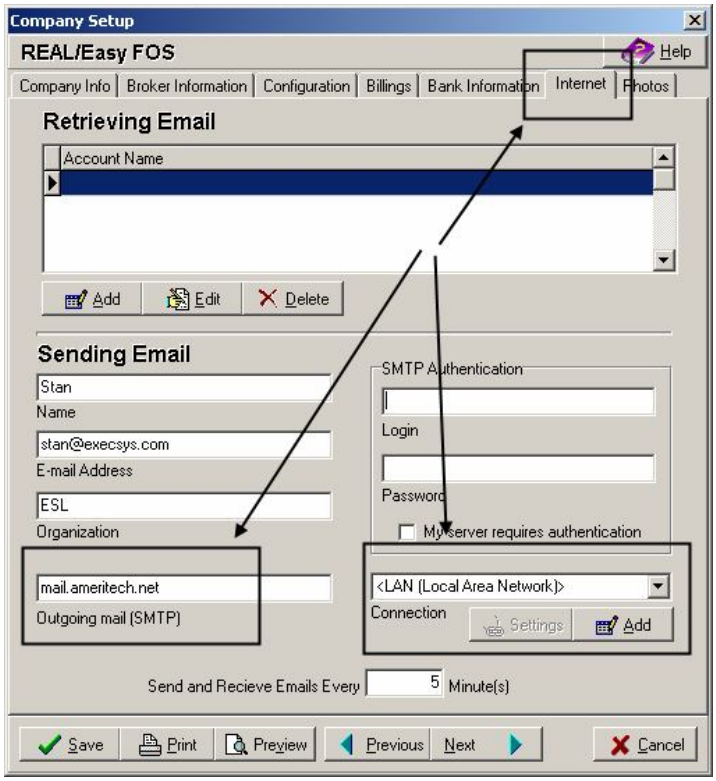


Enter a user name for the email server user. It is necessary to have a designated email server user to start the FOS email server.

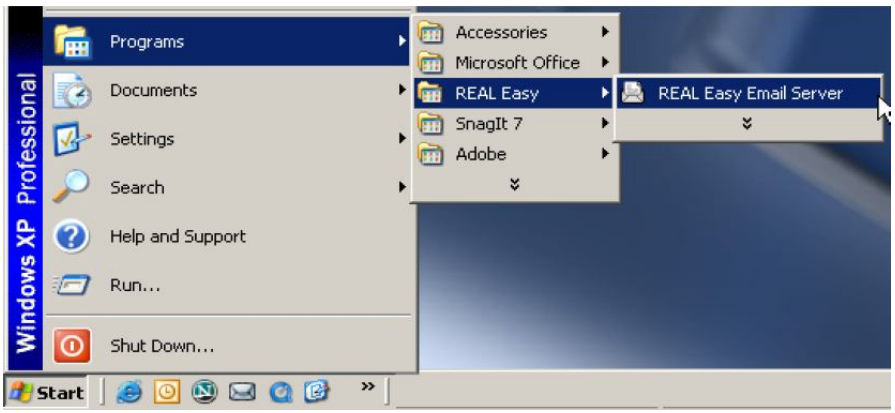
Save the new email user.



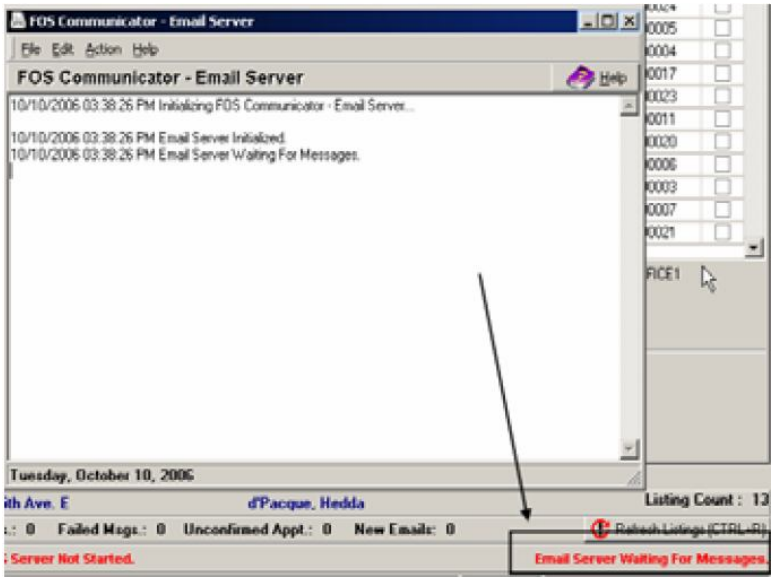
Click on Company Setup



Click on the Internet tab
Setup **Sending Email**
Enter the address for your outgoing mail server.
Set the connection type. If your Internet is supplied through your local network you can select the LAN setting.
Save your setup.

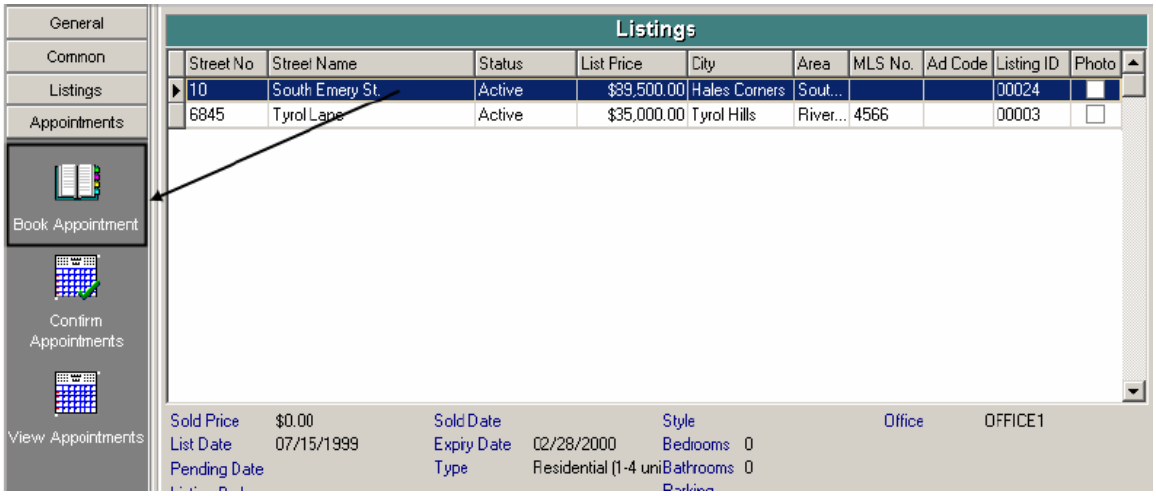


Go to START>Programs>REAL Easy>REAL Easy Email Server and the email server will start

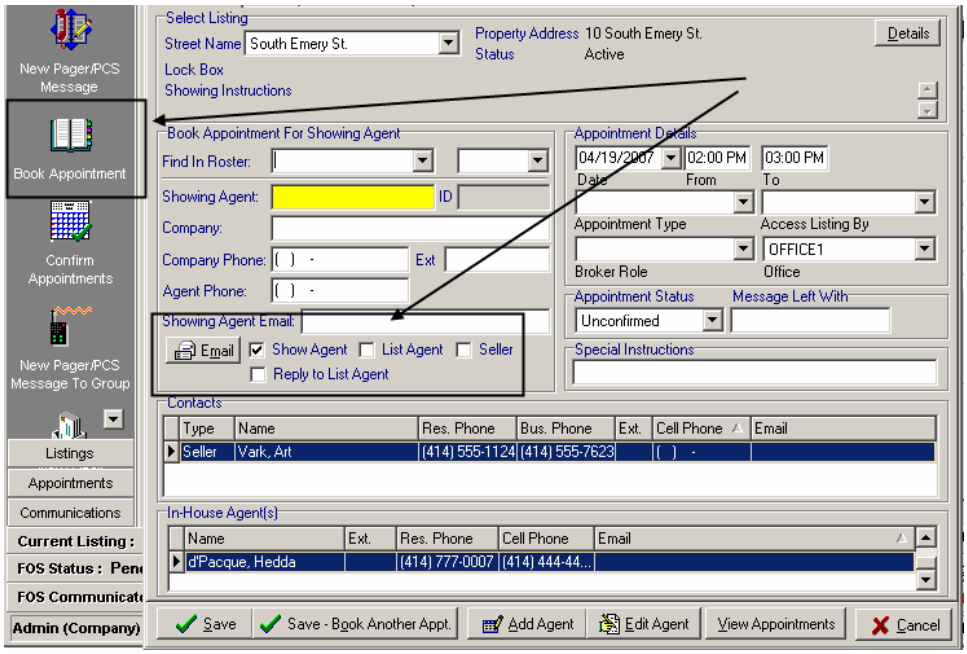


Note that the email server is running. You can minimize the server window.

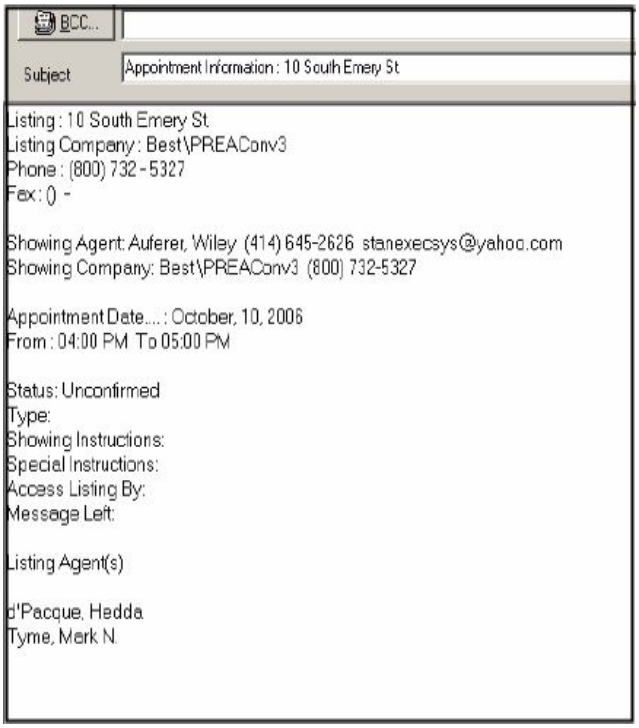
With the FOS email server you can send emails and review what was sent. Remember that your agents must have email addresses in their record.



Highlight a listing and click on Book Appointment_

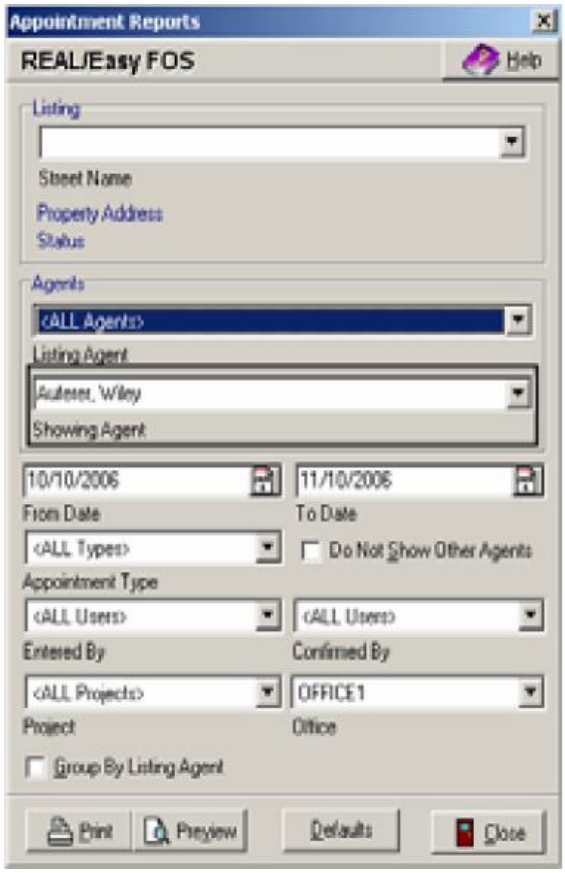


When you Book an Appointment, you can email it to the showing agent and anyone else involved in the listing.

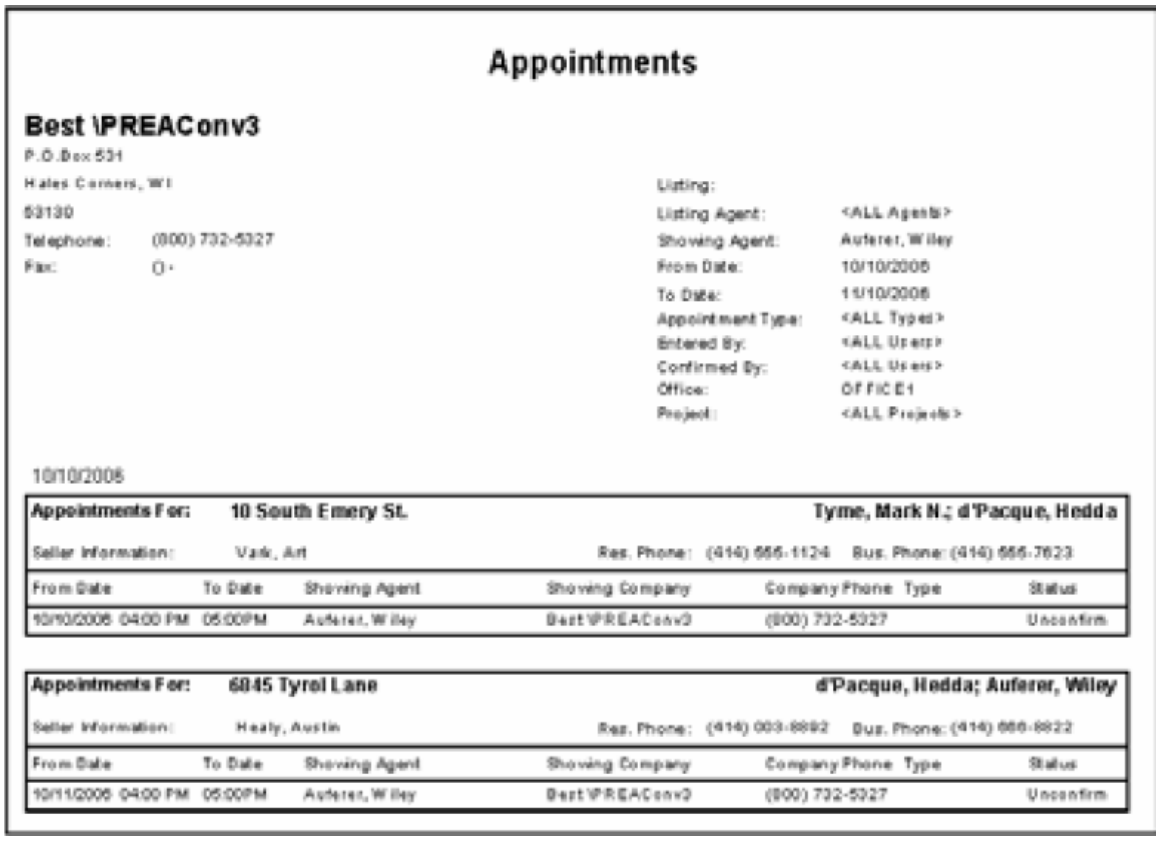


A sample of the showing appointment email.

You can also send appointment reminders.



Select the showing agent and Preview



Appointments

Best \PREAConv3

P.O.Box 531

Hales Corners, WI

53130

Telephone: (800) 732-5327

Fax: ()-

Listing:

Listing Agent: <ALL Agents>

Showing Agent: Auferer, Wiley

From Date: 10/10/2006

To Date: 11/10/2006

Appointment Type: <ALL Types>

Entered By: <ALL Users>

Confirmed By: <ALL Users>

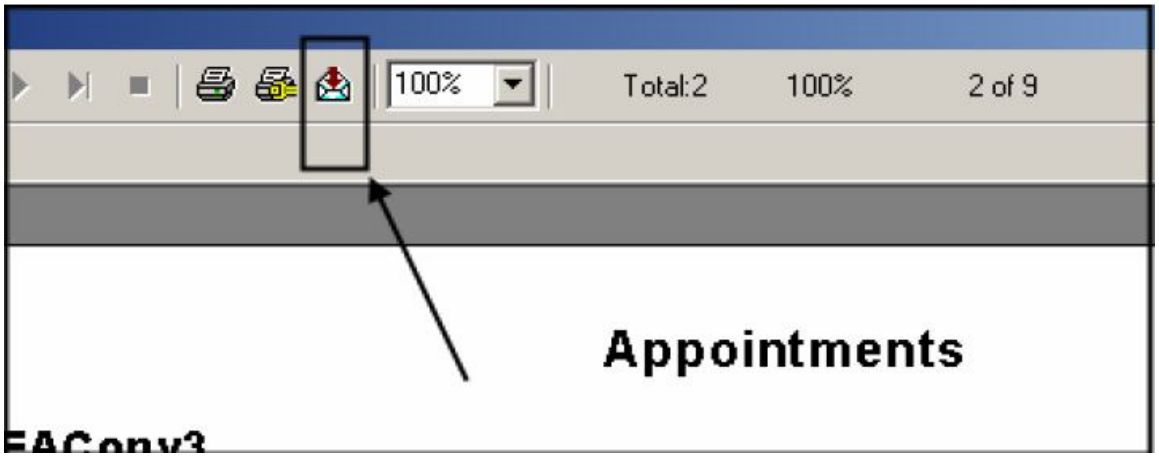
Office: OFFICE1

Project: <ALL Projects>

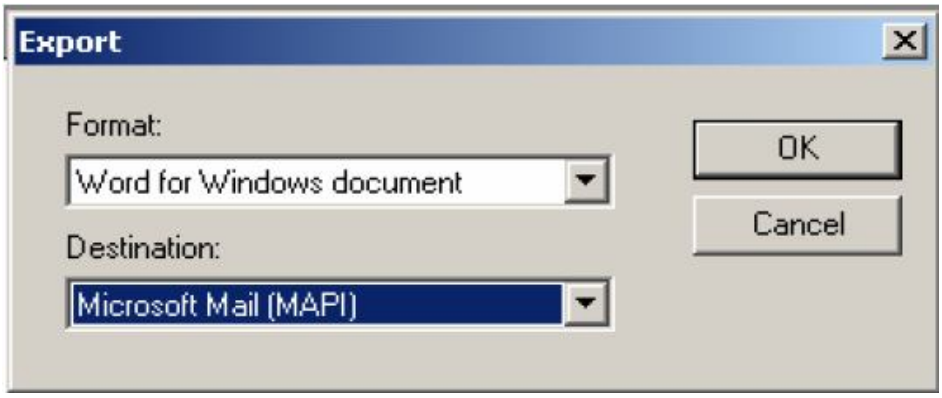
10/10/2006

Appointments For:	10 South Emery St.				Tyme, Mark N.; d'Pacque, Hedda
Seller Information:	Vark, Art		Res. Phone: (414) 555-1124	Bus. Phone: (414) 555-7623	
From Date	To Date	Showing Agent	Showing Company	Company Phone Type	Status
10/10/2006 04:00 PM	05:00PM	Auferer, Wiley	Best \PREAConv3	(800) 732-5327	Unconfirm

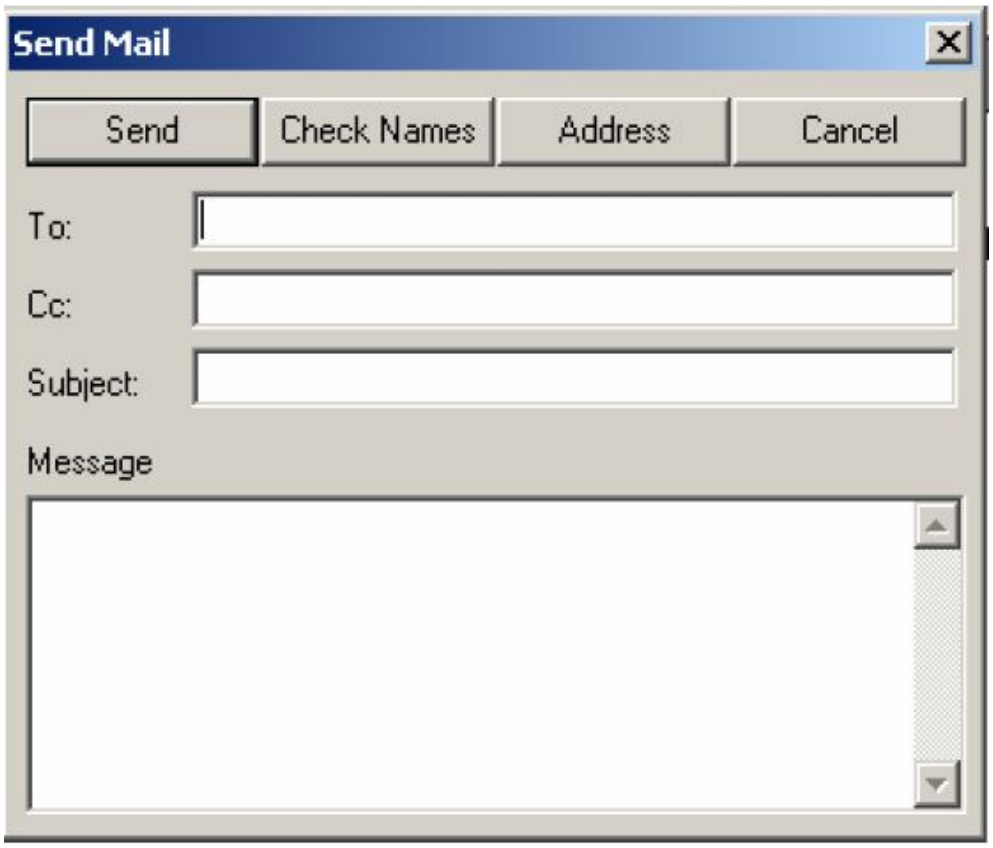
Appointments For:	6845 Tyrol Lane				d'Pacque, Hedda; Auferer, Wiley
Seller Information:	Healy, Austin		Res. Phone: (414) 003-8892	Bus. Phone: (414) 666-8822	
From Date	To Date	Showing Agent	Showing Company	Company Phone Type	Status
10/11/2006 04:00 PM	05:00PM	Auferer, Wiley	Best \PREAConv3	(800) 732-5327	Unconfirm



Select the export button to send in email.



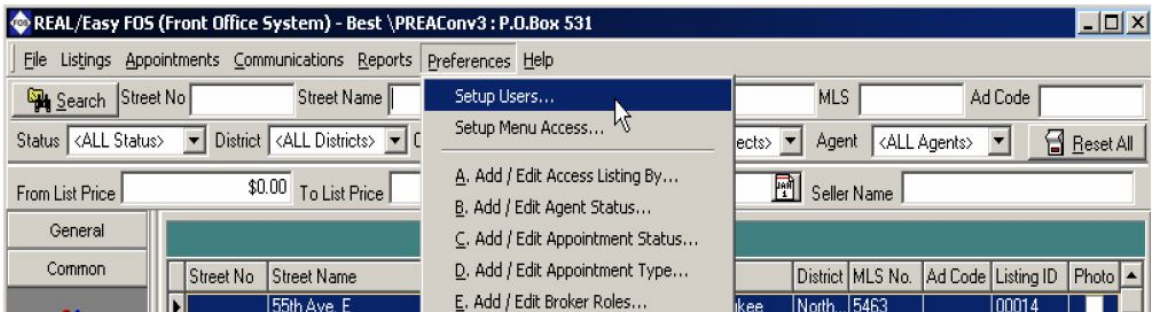
Select the Word format and Microsoft email.



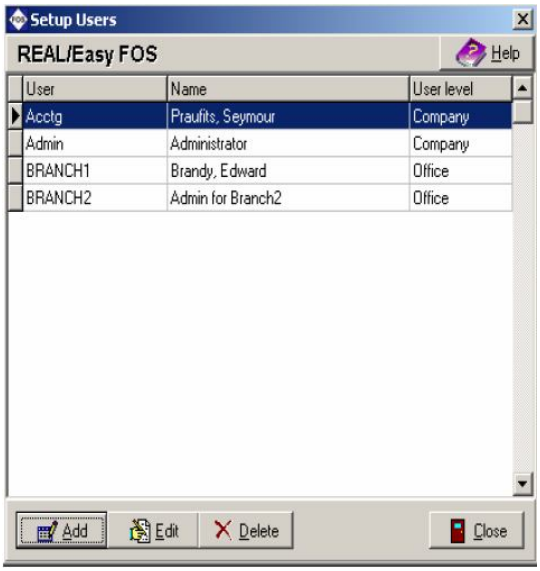
Send the email and the document will be attached

Setup FOS Texting Server

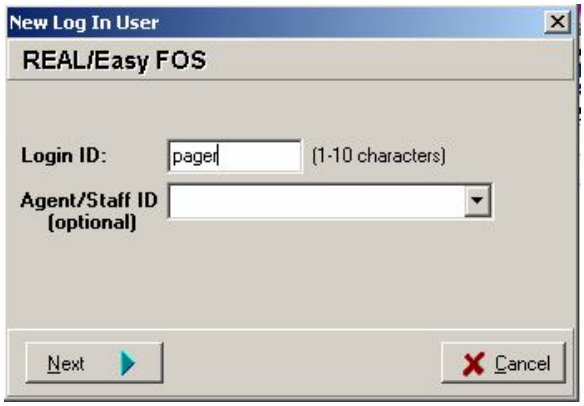
Open the REAL/Easy FOS program



Click on Preferences and Setup Users to create a texting server user



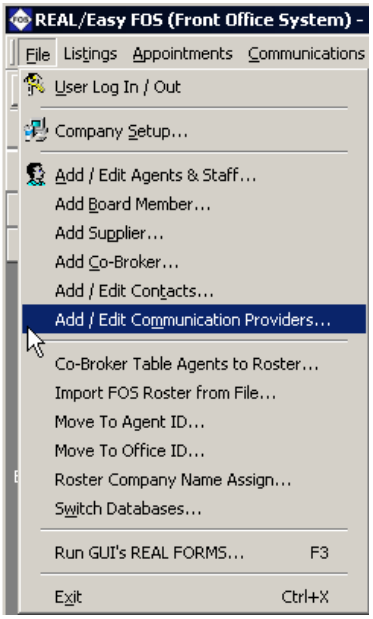
Click on Add



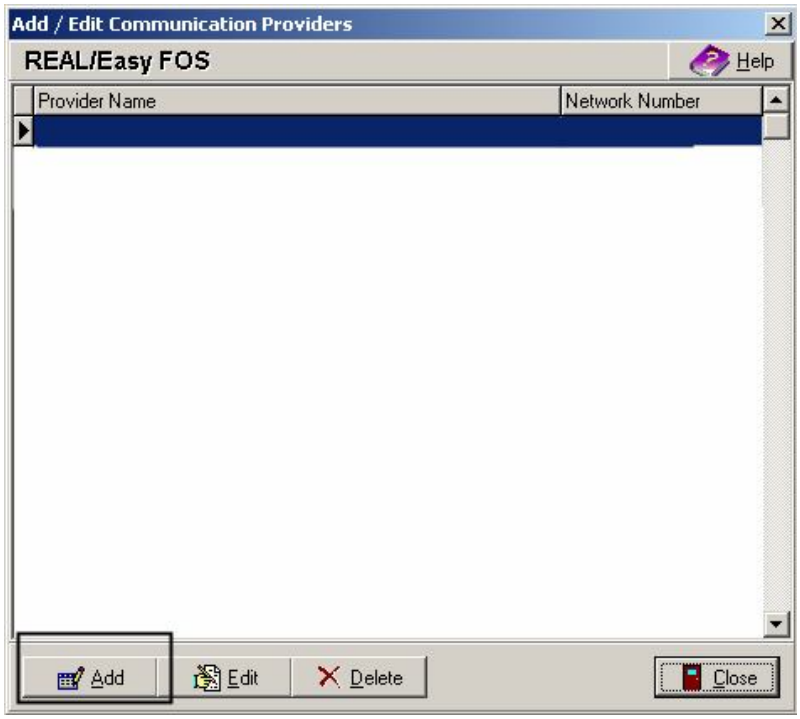
Enter a user name for the paging server user. It is necessary to have a designated paging server user to start the FOS paging server.

Save the new paging user

Communication Providers



Click on >File>Add/Edit Communication Providers



Click on Add

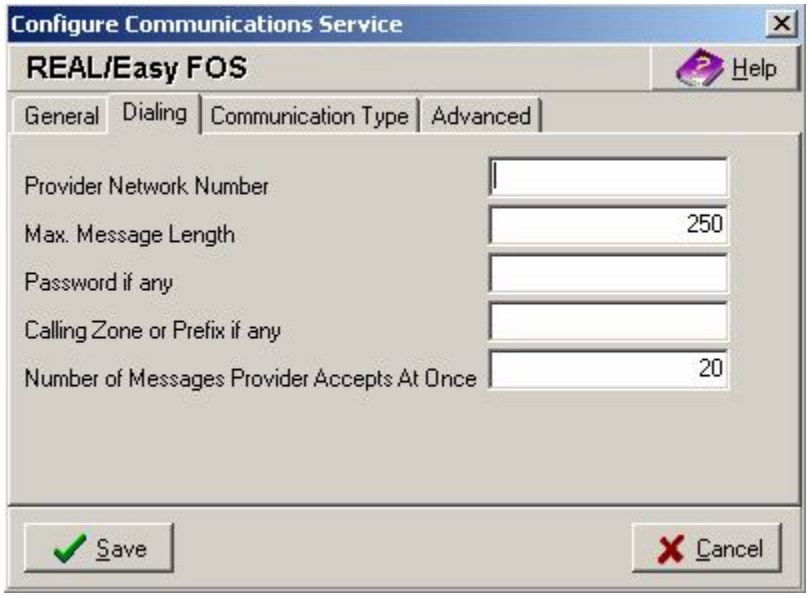
Name – Enter the name of the Paging Company or Cellular Phone Company.

Modem or ISDN Device – From the drop down list select the modem to use to send messages to the Paging/Cellular Company.

Transmission Types – Unless otherwise directed by your messaging provider select the default – Use message transmission based on data connections.

Protocol Type – Allows you to match the PCS Server with the same standards as your communications provider. You must check with the provider to establish the Protocol that they use.

Click on the **Dialing** tab at the top.



Provider Network Number – This is the network access number provided by your communications supplier to gain access to their paging/messaging computer.

Max. Message Length – the maximum number of characters available is 250, different companies have different standards. You should enter the maximum number of characters allowed by the specific company here. The FOS Paging system will automatically break up long messages into multiple pages and mark them as 1 of 2, 2 of 2 etc. so that your agents will know when they have received the complete message.

Password if any – Enter a network password for access to the paging providers system here if your provider requires it.

Calling Zone or Prefix if any – If you need to dial 10 digit numbers enter the area code here.

Number of Messages Provider Accepts At Once – Most paging/cellular messaging providers limit the number of messages received by its' modems at one time. Enter the correct number as provided here by your supplier.

Click on the **Communication Type** tab

Type – Select the type of device your agents are using with this provider. If you have different agents using different types of pagers with the same provider you will need to setup a service for each Type of device.

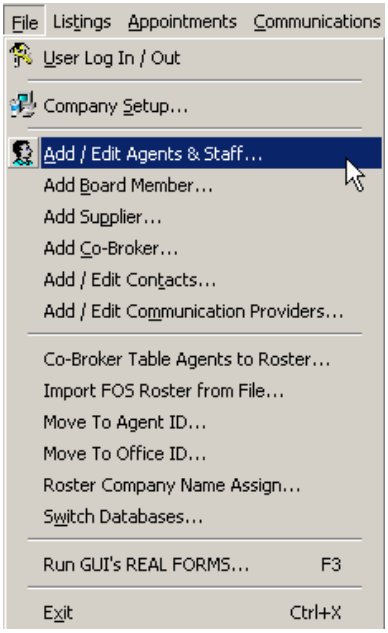
Break Up Messages Automatically – Check this to have the software break large messages up for paging to ensure the agents receive the complete message.

Max. Word Wrap for Breakup – Enter a number here up to the maximum allowed for a message by the provider before the software breaks up the messages.

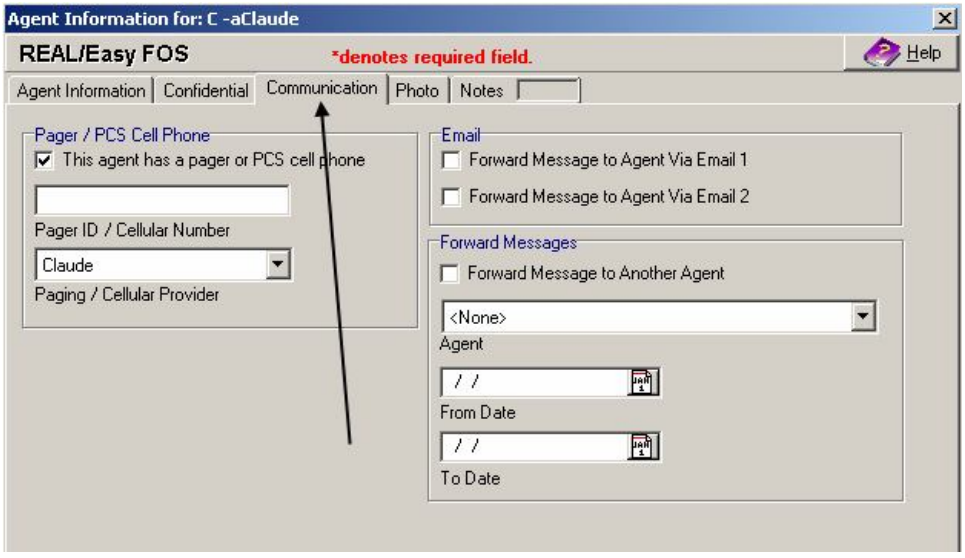
Click on the **Advanced** tab

The Advanced tab allows you to match your modems to that of the paging/cellular messaging provider. The default setting will work in most cases if you are having trouble with connections please contact the supplier and obtain the correct entries for these fields.

Agent Setup for Texting



Got to File>Add/Edit Agent & Staff



Select an Agent to edit and go to the **Communication** tab

Pager / PCS Cell Phone – check this box if the agent has a pager or PCS Cell Phone which they use for receiving alpha or alpha numeric pages.

Pager ID / Cellular – enter the agents cell number or pager id number in this field.

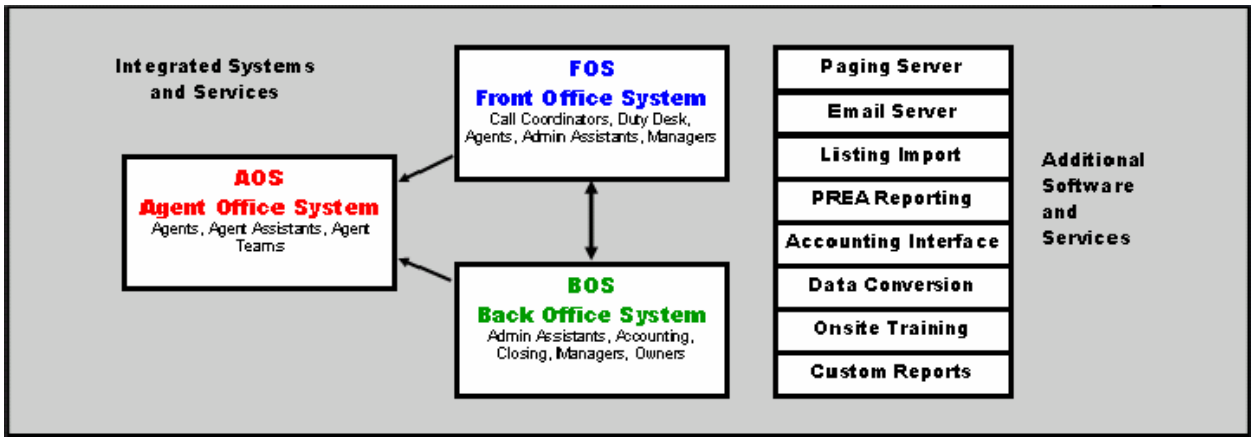
Paging / Cellular Provider – from the pick list select the paging or cellular company for the agent.

Email – if the agent has Email and wants their messages, appointments forwarded there check off the appropriate box.

Forward Messages – if the agent wants their messages to be forwarded to another agent while they are unavailable, such as on holidays, check this box and select the other agent here. You can select the from and to date this will automatically set the software to stop forwarding the agent's message on the set return date. When forwarding is turned on both the agent and the agent to which the messages are forwarded to will receive copies of any messages.

NOTES:

Want Everyone in Your Company to Run It Like a Business?
Invest in Integrated Management Software from REAL/Easy!



1-800-REALEASy realeasy.com