

# REAL/Easy Version 17

Installation: PC/Server/Workstations

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Learn: Key Company and Security Setups

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1-800-732-5327

## **Welcome to the REAL/Easy Management Software**



Welcome to REAL/Easy management software and the Back Office System - BOS. You will find that the BOS system will enhance your ability to operate your real estate business more efficiently and also more profitably with management reports that help you quickly adapt to changes in the business.

The purpose of this manual is help you install and get started with the software. There are three parts:

1. The Installation of REAL/Easy Management Software on your network or on a stand-alone PC.
2. Initial Setups for BOS – basic setups for company, offices, and agents.
3. Setup Users and Control Access to the system.

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## Part 1: Installation of REAL/Easy

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Welcome to the Installation instructions for REAL/Easy management software using CD setup.exe program.

The setup program will install the three REAL/Easy systems:

- BOS** Back Office System, to help you more efficiently run all aspects of your real estate brokerage back office.
- FOS** Front Office System, to help you operate the call, duty, and showing desks.
- AOS** Agent Office System, to help your agents efficiently track their businesses and provide a self help to obtain showing, activity, earnings, and expense information

The BOS system provides all of the user security and key company setup controls for BOS itself and for FOS and AOS.

### Where are the REAL/Easy software programs installed?

Using the default settings, REAL/Easy Back will be installed on the C: drive of your stand-alone PC or Windows Server within the “BOS” folder. During installation, a new folder named “BOS” is created for the software and your database. So everything is typically installed in the path: **C:\BOS**.

### Where is my database for backup?

Every day that you enter data into REAL/Easy, you will want to make a backup. REAL/Easy itself does not have a backup program, so you need to add the name and path of the database to your daily backup program’s procedure. With the default installation, the data path to backup is:

**C:\BOS\Data.**

### Program Minimum Requirements:

- 32 or 64 bit processor
- 1 GB RAM LAN minimum workstation, 4GB minimum RAM Server with Terminal Services
- 3 GB of free hard disk space
- Monitor with 800x600 screen resolution minimum.
- Windows 2000 Sp4, XP Sp2, Vista, Win 7, Win 8, WinServer 2000, 2003, 2008, 2012
- Laser printer for check writing
- Backup software and hardware (local tape/zip/CD drive or remote backup is recommended)
- Uninterrupted Power Supply (UPS)

### Step 1 – Does your system meet the Minimum Requirements?

If not, we recommend making adjustments before proceeding with the installation.

### Step 2 – Start the Setup Program from the CD



Insert the BOS CD in your CD-Rom. Go to MY COMPUTER or My Files and Click.

Name	Type	Total Size	Free Space	Comm
<b>Hard Disk Drives</b>				
Local Disk (C:)	Local Disk	18.6 GB	671 MB	
Local Disk (E:)	Local Disk	27.9 GB	24.6 GB	
<b>Devices with Removable Storage</b>				
RE148 (D:)	CD Drive	39.0 MB	0 bytes	
<b>Network Drives</b>				

Double-click the CD drive with the BOS CD in it.

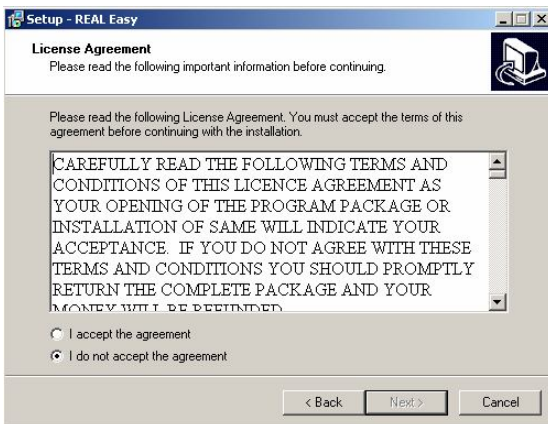
Name	Size	Type
setup.exe	39,677 KB	Application

Double-click the SETUP.EXE file to start the setup (software installation) program.



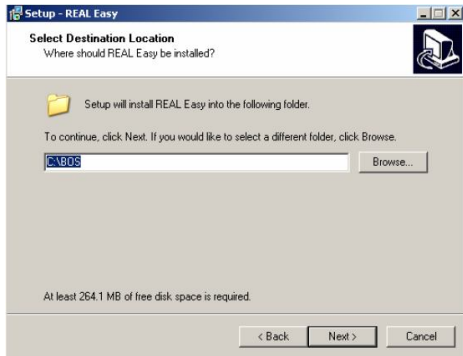
The above window will appear when the installation is ready to begin. Click on the Next Button.

### Step 3 - License Agreement



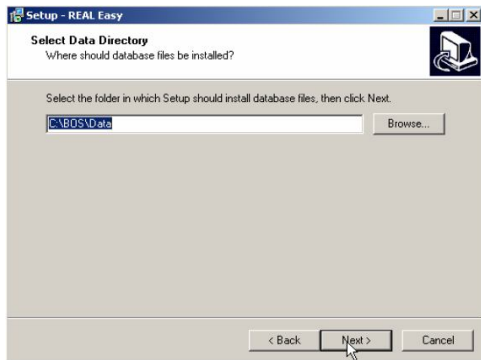
You must review the License Agreement. Click the **“I accept..”** button to install the program.

### Step 4 - Destination Directories for the program and database and program installation



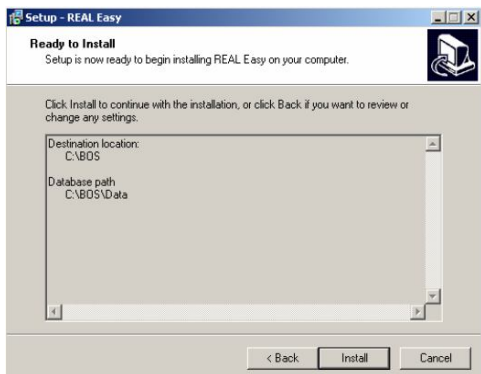
The system should be installed to the C:\BOS folder. (If you have another drive, especially if installing on a server, then browse to reset the drive letter and enter “BOS”, e.g. E:\BOS).

Click on the **Next** button.

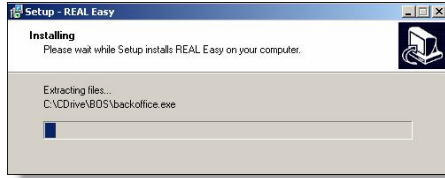


Above: This is the default path of the DATA folder for BOS. This can be changed as needed.

Click on the **Next** button.

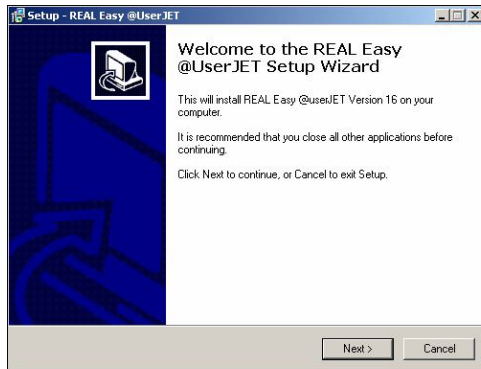


Click on the **Install** button.



Above, programs are installed. When completed you will receive this added installation option:

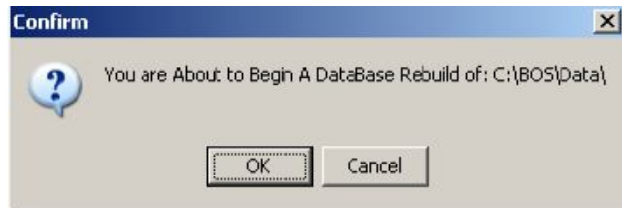
### Step 5 – Option to install Microsoft Jet database drivers




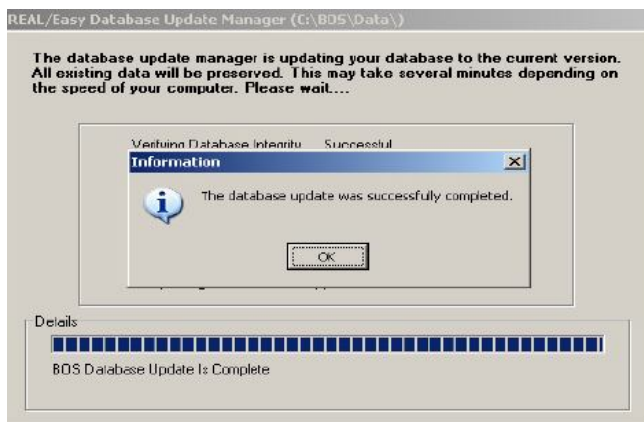
Some releases of Windows 7 and 8 may need this install, so click “Next”.

**IMPORTANT:** if during this step you receive an installation problem message, do not stop but click the “Ignore” option and continue on (just means these drivers are probably already installed).

### Step 6 – Rebuild/Update the database.



 Click on the **OK** buttons. This will update the database from any previous version.



Above: message indicates when the database update is completed. Click “OK”.

**Step 7 – Finish and reboot if necessary.**

When Setup is completed, you will see this window. If this is an installation of an update you can probably click “No”. If you are making a new installation and it is convenient to re-boot now, click “Yes”. Otherwise click “No” but it is recommended to reboot later. After choosing, click on **Finish**.

In the next section you will startup the REAL/Easy BOS System, login, and do some basic setups. These steps also insure that you are operating OK. . (If you have installed on a server, yes, continue on as well, because you need to make sure REAL/Easy BOS runs OK on the server before setting up your workstations).



## Part 2: Login and Key Setups

### Step 1 - System Startup and login



Ready? Now click on the REAL/Easy BOS icon, which should now be on your Windows desktop.



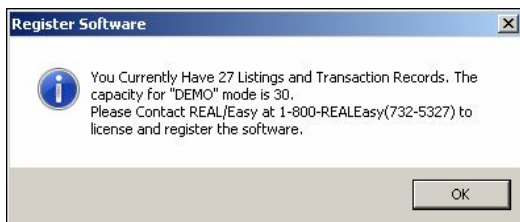
At start-up, users are required to enter a password to access the REAL/Easy BOS. For a new installation there is one user already setup: “Admin”. This user does not have a password.

A note about security: later, your system administrator can assign different security password levels to different users. You can restrict which user has access to the various commands, reports, and entry screens.

Every new installation of the REAL/Easy BOS allows up to 30 transactions/Listings while unregistered. If you are reviewing the program before deciding to purchase a license, with up to 30 transactions you should be able to test many of the features in the system. This would include agent, client, listing, and sales entry, escrow accounting and check writing. After the software is registered, there is no limit to the amount of business that can be processed.


“Admin” is default login User and is assigned “OFFICE1”. Leave them as-is above (User = Admin, and Office = OFFICE1). For now, you will not have a password, so leave that blank. Note that the user’s default Office and Level are assigned and displayed on this login screen.

Click on the **OK** button



Until you register your REAL/Easy BOS system, you will obtain a reminder message, similar to above, indicating that you can enter a total of 30 transactions between the FOS and BOS programs. Until you reach that point, you will be able to use all portions of BOS as if you have purchased.

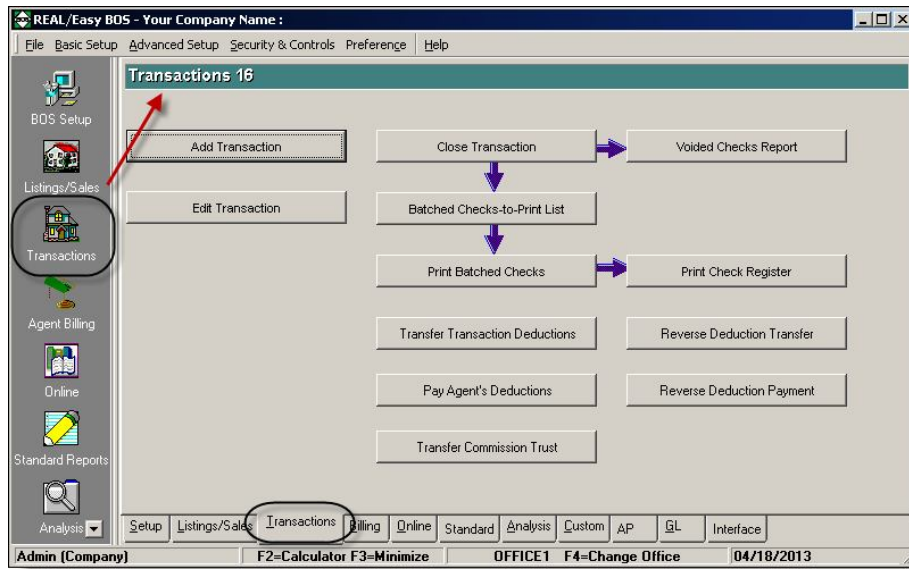
When you license REAL/Easy BOS, you are provided activation codes that enable REAL/Easy BOS to run so as not to receive the above message. We'll show you how to register shortly.

 Now, Click on the **OK** button.

If you see this (above), you're in great shape—your REAL/Easy BOS system is now starting.

### Step 2 - REAL/Easy BOS is Running

Now you are ready to use BOS! Like all Windows systems, you'll see the title bar at the top. It should tell you that you are in the "REAL/Easy BOS" and have a company name of "Your Company Name". Then next line is your menu bar starting with File, then Transactions, etc. You can perform various setups and customizations with this menu.



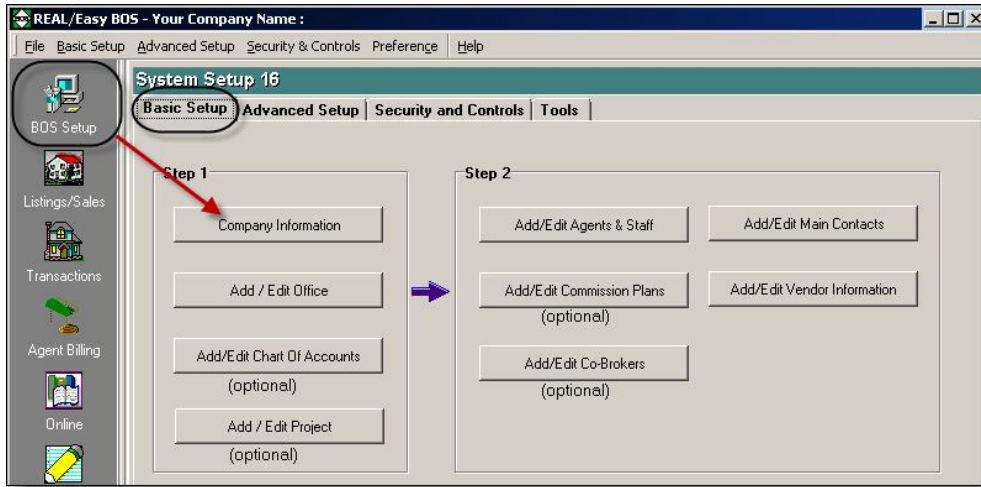
The vertical frame at the left is the tool menu to reach each "module". Each module can also be reached with the bottom tabs. Each module's commands are displayed within the main screen or desktop.

Note: if you do not see the left tools panel, you can drag from the left edge until it is displayed.

You probably noticed that it's ready for you to work on your Transactions. So when you start REAL/Easy BOS, it always starts you at the Transactions module as if you had clicked on the Transactions tool at the left or the bottom Transactions tab. In section 4, you will learn how to start a user in any module, such as starting the general manager within "Standard Reports".

Note that the login name, default office for data entry and reporting, and the current date are shown at the bottom of the desktop.

### Step 3 - Company Name Setup



🖨 The first thing you want to do is a few basic setups. Click REAL/Easy BOS Setup. This will display four setup menus on your Setup desktop: Basic Setup, Advanced Setup, Security and Controls, and Tools.

🖨 On “Basic Setup” We want to change our company name, so Click on **Company Information**

🖨 **Company Name:** Enter your Company name, e.g. Best Realty

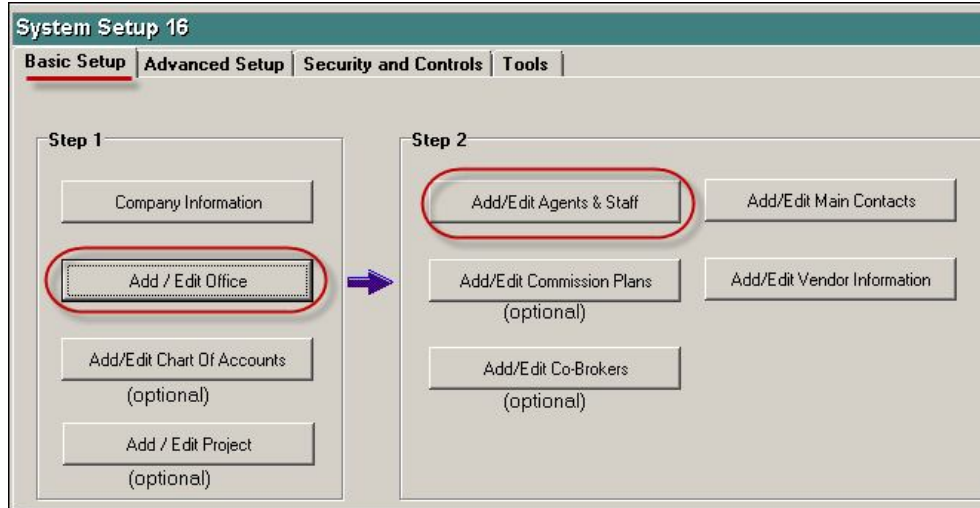
🖨 **Street, City, State, Zip, and Country:** Enter the mailing address for your company. Be sure to include the City, State, Zip Code and the Country.

🖨 **Telephone:** Enter the main phone number used by your company for support calls.

**Fax:** Enter the number to be used by your company for receiving help information by fax.

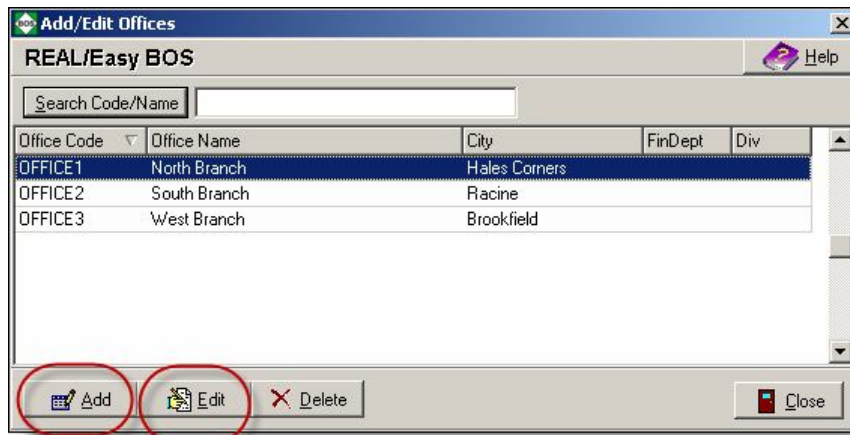
🖨 **Click on Save**

## Step 4 - Edit/Add Office Names and Agents



Click on **Add/Edit Offices**

In this step you will enter all of your office/branch names and numbers. You must have at least one office. Later, as you enter associates and sales, these are then assigned to an office



There will be an "OFFICE1" code already there named "Your Office" click to select it and click **Edit**.


Note: if you do not want to use the OFFICE1 ID, simply enter any ID's you wish (e.g. "NB" for North Branch") and remove the "OFFICE1" Id later.


Use the "Edit" Change to the name of "OFFICE1" , e.g. "North Branch", enter information and click **Save**

If you have more than one branch Click on **Add** to enter and save them.


Click on **Close** when finished.


The next step is to enter the basic records for your agents and staff.

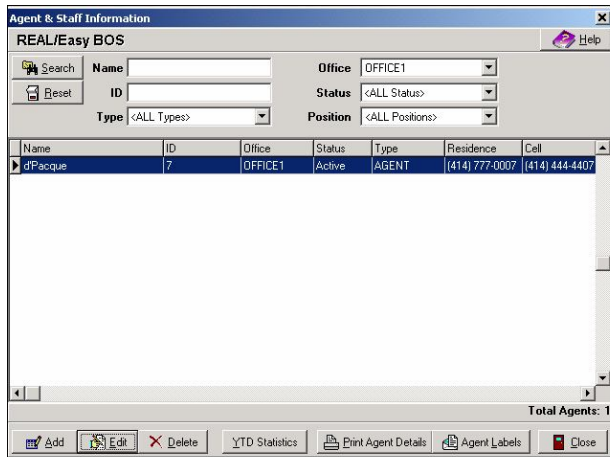
 Click on **Add/Edit Agents & Staff**

 Click on **Add**

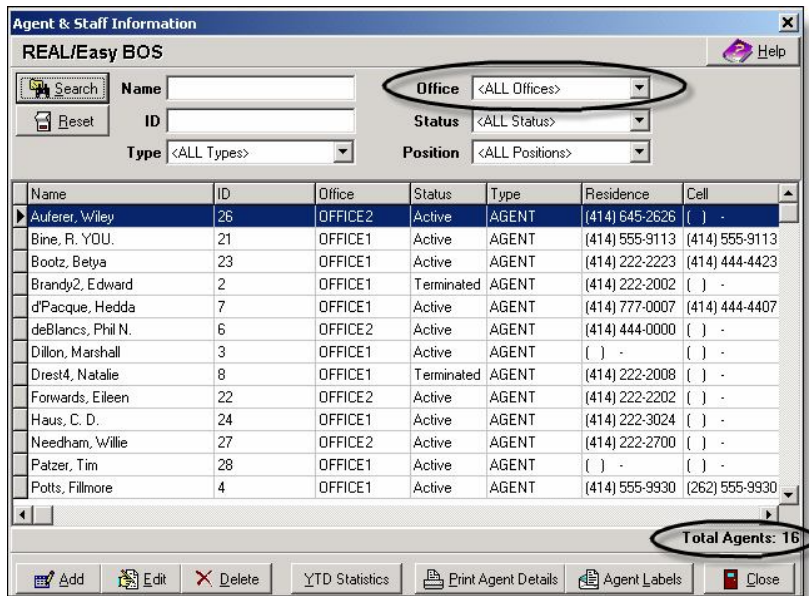
REAL/Easy will provide a number but you can enter your own ID if you wish – e.g. last digits of the SSN or the MLS number.

 Click on **Next**

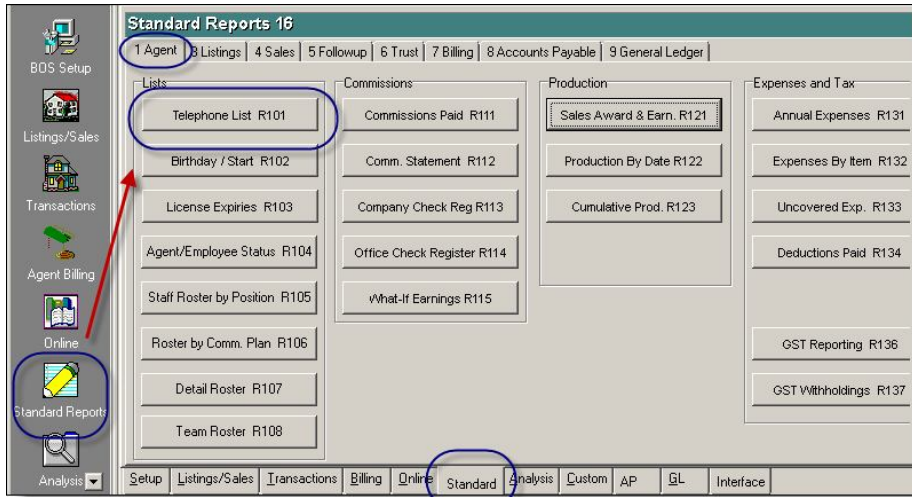
 Enter key agent information on the “Agent Information” tab and click **Save**



Continue to **Add** all active agents. (or, after providing others access to BOS, have them complete the agent roster entry.



When completed, click **Close**.



Next, to review the agent records entered, print a short agent list from within the “Reporting” area of REAL/Easy BOS:

- 🖨️ Click open the “Reporting” area and click “Standard Reports”.
- 🖨️ From the “1 Agent” tab, print a “Telephone List R101”



**Agent Telephone List**  
**The Best Realty Company**  
 Office: <ALL Offices>

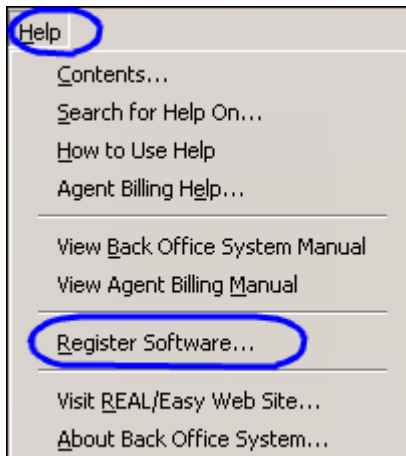
Agent Name	Status	Cell No.	Business No.	Ext.	Fax No.	Email
Auferer, Wiley	A	-	(414) 543-5361		(414) 543-5650	stanexecsys@yahoo.com
Bine, R. YOU.	A	(414) 555-9113	(414) 543-5361		(414) 543-5650	rybine@thebestrealty.com
Bootz, Betya	A	(414) 444-4423	(414) 543-5361		(414) 222-2278	bb@thebestrealty.com
deBlancos, Phil N.	A	-	(414) 543-5361		(414) 543-5650	
Dillon, Mars hall	A	-	-		-	mdillion@longbranch.org
d'Paocque, Hedda	A	(414) 444-4407	(414) 543-5361		(414) 777-0008	number1@thebestrealty.com
Forwards, Eileen	A	-	(414) 543-5361		(414) 543-5650	
Haus, C. D.	A	-	(414) 543-5361		(414) 222-3024	
Needham, Willie	A	-	(414) 543-5361		(414) 543-5650	
Patzer, Tim	A	-	(414) 555-2222		-	
Potts, Fillmore	A	(262) 555-9930	(414) 543-5361		(414) 543-5650	fillmorepotts@yahgle.com
Praufits, Seymour	A	-	(414) 543-5361		(414) 543-5650	\$\$@office1bestrealty.com
Theis, N.	A	-	(414) 543-5361		(414) 543-5650	

At this point, there are a number of ways to continue depending on your priorities. To learn how to enter listings and sales you can go through the “Tour of Best Realty” booklet or step through the learning exercises using the “Basic Course” booklet. In the Basic Course, you work through the exercises with the staff at REAL/Easy.

## Step 6 – Purchased? Register your Software

If you have purchased REAL/Easy BOS, you now want to register (activate) it to remove the 30 transaction limitation. There is a registration screen in REAL/Easy BOS where you will record some key information, which is needed by REAL/Easy. REAL/Easy will then give you the registration number(s) that you will then enter to complete the registration.

If you are just testing REAL/Easy BOS at this time, skip this step. However, we are sure that if you test REAL/Easy BOS for the next few days and then purchase, you will be returning to this step so that you can keep continue working and not loose any of these and other setups and data you may enter.



- From the menu bar, click on **H**elp and then, from the drop down as above, click on **R**egister Software...

(Yes, server installations do the same thing, follow these instructions. You must use the Register Software function on the server. Later, you will setup workstations).

Below is the registration screen. To make things easy, just call REAL/Easy Software 1-800-REALEASy (1-800-732-5327). They will ask you for the Primary and Secondary Lock Codes. Then, depending on what you have purchased, e.g. BOS, FOS, the franchise module, the interface accounting, and a certain number of users, they will provide activation keys that need to be entered on this screen. Make sure that you review the license agreement as well.

**Register Software**

**REAL/Easy**

This SOFTWARE LICENSE AGREEMENT is BINDING upon selecting the "I Agree" button, located at the bottom of this dialog box, and proceeding to install this software application. Should you not agree to the terms of this Agreement, please select the "I Decline" button, located at the bottom of this dialog box.

CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS OF THIS LICENCE AGREEMENT AS YOUR OPENING OF THE PROGRAM PACKAGE OR INSTALLATION OF SAME WILL INDICATE YOUR ACCEPTANCE. IF YOU DO NOT AGREE WITH THESE TERMS AND CONDITIONS YOU SHOULD PROMPTLY RETURN THE COMPLETE PACKAGE AND YOUR MONEY WILL BE REFUNDED.

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**Company Name** The Best Realty Company

**Number of Active Agents** 13      **# List and Tran** 27

**Customer Number** 20001DFCIGX41767A0030

**Expiration Date** 05/08/2014

**Registration Number** 82262683112151450707

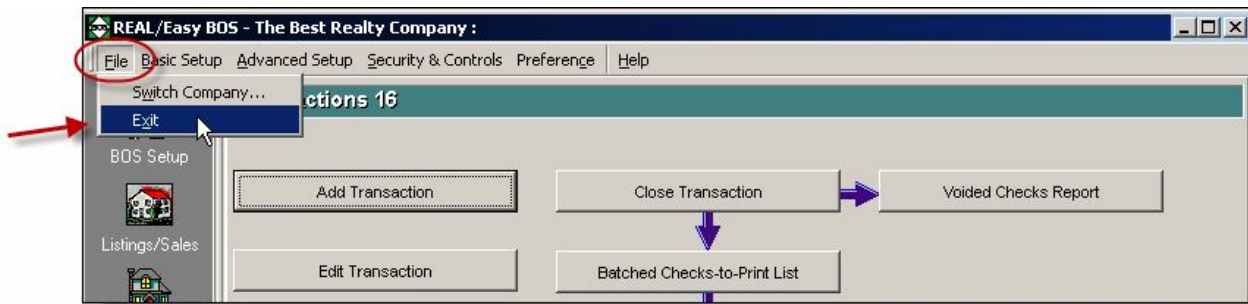
Save : | Accept      X Cancel

- 🖨 First verify the company name. It can be updated on this screen if necessary.
- 🖨 Call the 800-realeasy number to obtain your customer number.
- 🖨 You will also be directed to enter the number of company and office level users you have subscribed for.
- 🖨 Last, you will be given a registration number. Enter the number and click **Save**.

## Step 7 - Exit from REAL/Easy BOS

Congratulations! You have now run BOS for the first time, completed the basic setups of company name and Branch names. And, if you have purchased BOS, you are now registered and ready to begin tracking your business for a long time to come.

If you are just testing, you will be able to try out all functions while adding up to 30 transactions as if you had purchased. At the end of your 30 transaction limit, or before, you can purchase your BOS license, register, and keep going as if you had purchased today.



So let's end our REAL/Easy BOS session and Exit:

- Click on the menu bar's **F**ile then the File drop down's **E**xit, returning to your Windows desktop.

Now you are ready to use more of the software. Turn to page 37 for some suggestions on how to proceed!

### For Server Installations, continue on to Section 3

If you have installed REAL/Easy BOS on your Server and you wish to access from your PC client/workstations, we have one more step for you. Following instructions in the next section, you will setup each workstation so that you can access the server copy of REAL/Easy. BOS and use in the same manner you just did from your server and share the same, common, database.

This means that with all stations that you setup, will be able to all enter listings, sales, agents and print reports all from the same shared REAL/Easy BOS that you've just installed on your server.

## **Setting up Network Workstations**

### **LAN or using TS (Terminal Services or Citrix)**

If you are setting up REAL/Easy on a network, this section will provide the needed instructions. If you are not using a network, your installation is complete and you can continue with the tour and/or training immediately.

Following are the steps necessary to setup user access to REAL/Easy using your network, or local area network (LAN) workstations after you have already installed REAL/Easy BOS onto your 2000/2003 server.

**These are setups are different depending whether you are connected through a LAN or using Terminal Services.**

Note, that if you are NOT a network administrator:

- a. You need to get that person over here right now!
- b. Don't even think that you save any time or money by doing this yourself!

Shown are the setup steps you have to follow including example screens. In our examples we have:

1. Installed REAL/Easy BOS on our server in the path C:\BOS
2. Have a server named Ferrari3
3. Have a notebook computer that we have hooked to the network that we want to run BOS from. We have mapped the notebook's network Y: drive to the server's C: drive root.

Your server and workstation information:

1. Installed REAL/Easy BOS on your server in path: \_\_\_\_\_  
(default was C:\BOS)
2. Your server name is: \_\_\_\_\_
3. This workstation has a network drive mapped to the server's BOS installed drive letter indicated in 1. This network drive letter is: \_\_\_\_\_ (e.g. F:, X:,,,)

Note: when you do the following steps, use your setups, not our examples.

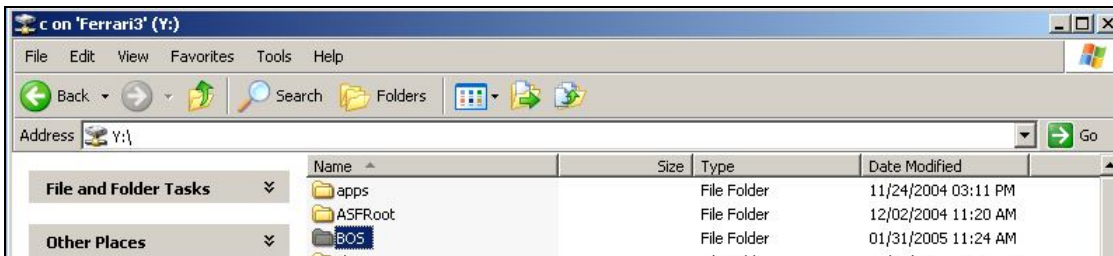
## Setting up LAN network users or TS (Terminal Server) users.



At your user desktop, (you are at the operator’s workstation logged in as the user) click on “My Computer”




Next, locate and open the network drive mapped to the server where REAL/Easy BOS is. (Or if in Terminal Services, the drive with the BOS folder).



You should now be viewing folders that are on the server. Next, locate and open your server’s **BOS** folder.

Name ^	Type	Size
@UserICONS.exe	Application	278 KB
@UserJET.exe	Application	1,709 KB
@UserLAN.exe	Application	2,313 KB
@UserTS.exe	Application	279 KB

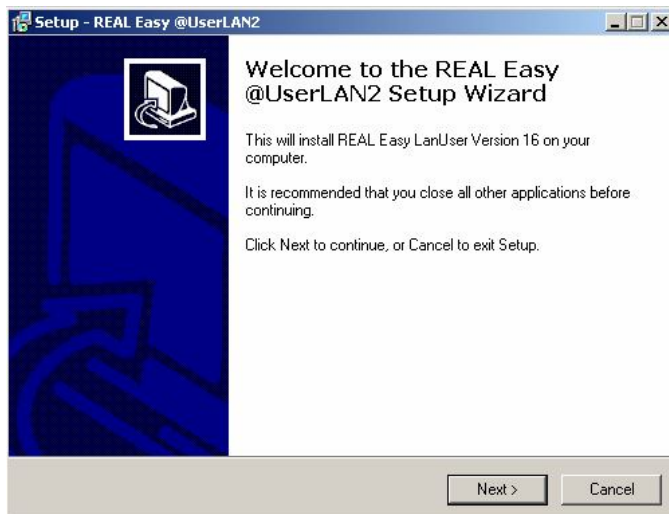
 If you are accessing your server through a LAN then run the **@UserLAN.exe** file


*OR*

Name ^	Type	Size
@UserICONS.exe	Application	278 KB
@UserJET.exe	Application	1,709 KB
@UserLAN.exe	Application	2,313 KB
@UserTS.exe	Application	279 KB


 If you are running on the server through Terminal Services then run the **TSUser.exe** file.

Below: the “@UserLAN” (similar “@UserTS” setup program will load and display:



 Click on **Next**



 Click on **Install**

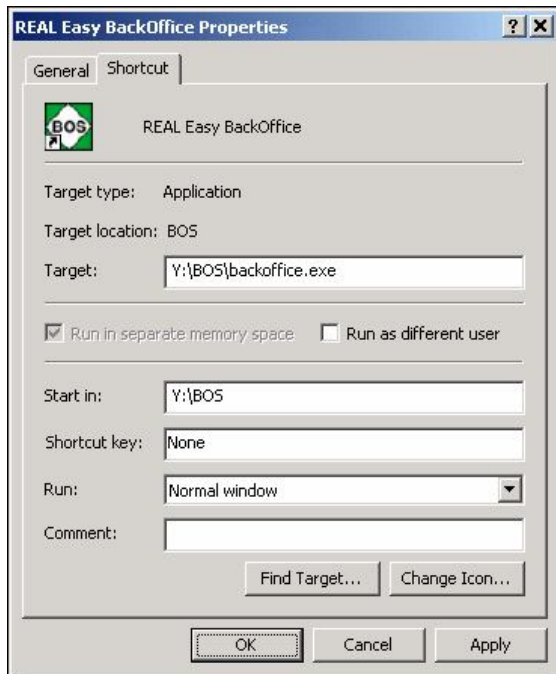


 Click on **Finish**

Operation of BOS is identical to that on the server, only all data updates actually take place on the server's database. When you Edit and Add data, that is all placed on the server.



To test operation, just click on the icon and proceed as we've just learned. To verify to users that all is working, you might want to edit the company information from this client PC, save, and then view it at the server.

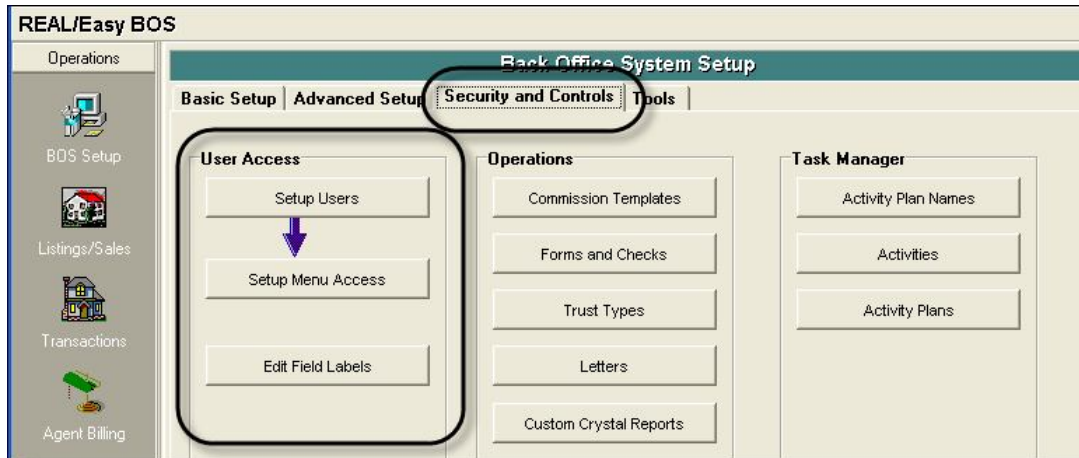


For LAN stations, you might verify the client PC's icon properties to make sure that they point to the network install of REAL/Easy BOS. Our setup is shown above.

## Setting Up Users and User Access

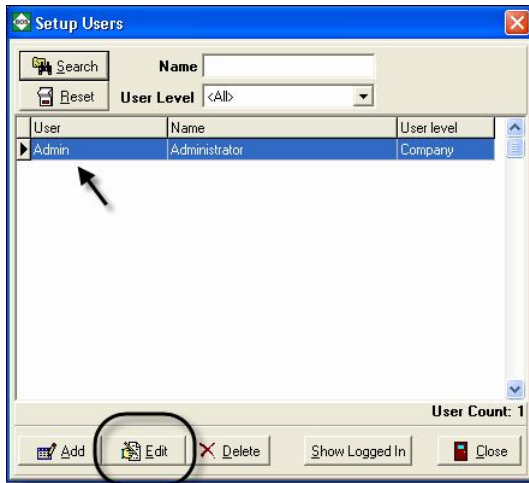
The “Security and Controls” tab of BOS Setup includes commands to setup your “User Access”. REAL/Easy’s three integrated systems, BOS/FOS/AOS, offer capabilities to help all company management, administration, and sales associates.

Some users, like those in the closing and accounting departments will use commands that process sales transactions and pay commission splits. Owners and managers will use the system’s reporting capabilities to track company productivity. Administrative personnel will keep associate, listing, and offer data maintained. Branch managers will want to view their office and agent activity, production and trends. Sales associates will want to view earnings and expense records, production information, as well as listing showing and other activities. And still other departments such as HR, relocation, concierge, title, call desks have the need to quickly lookup key information about agents, listings, and sales transactions.

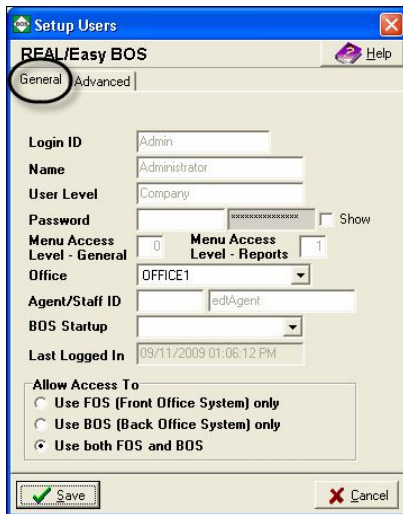


Creation of user ID’s and controls for all of these user types is setup within “User Access”:

- User ID’s and controls are maintained with “Setup Users”.
- Access to BOS/FOS/AOS commands are controlled with “Setup Menu Access”. With this setup, commands in BOS/FOS/AOS are assigned a minimum required access level number.
- Data entry item labels can be customized with “Edit Field Labels”.



All installations will have an “Admin” user. For a new installation, this user is setup without a password and has access to all features in REAL/Easy.



The Admin user initial setup is shown above in the user entry and maintenance screen. There are two tabs of information – “General” and “Advanced”.

### General tab:

The **Login ID**, **Name**, and **User Level** cannot be changed and Admin is a special user that cannot be removed. When you add more users, each is assigned a unique Login ID.

**User Level:** each user is assigned as a Company, Office, or Agent level user.

- **Company** users can access BOS and FOS data from any office.
- **Office** users can access BOS data only from their office. They can also be granted FOS access.
- **Agent** users can only use AOS and can only access their own earnings and production records.

**Password:** If REAL/Easy is installed on a network, the Admin user should be assigned a password.

For every user, two **Menu Access Level** numbers are assigned:

- **General** – is a number from 0 through 9. For Admin this is locked in at 0 (zero). General commands are those where data is added, edited, and processed (e.g. printing checks).
- **Reports** – is set to a number from 1 through 0. For Admin this is locked in at 1. The Reports commands are in the Standard, Analysis, and Custom modules and are used to list and analyze data not maintain or process.

**Office:** every user is assigned a default or login ID. For Office level users, this office ID is set to the office you want them to have access to in BOS. For Agent level users, this will be the agent's assigned office.

**Agent/Staff ID:** you can further identify the user by connecting them with their Agent/Staff record in REAL/Easy if entered. For agent level users, this is required. For Company and Office level users, this assignment is not required.

**BOS Startup:** For BOS users this entry will place them in the module selected with they first login into BOS. A user would normally be started in the "Transactions" module. With this setup, the startup module for **BOS** users can be set to one of these modules:

- BOS Setup
- Listings/Sales
- Transactions
- Agent Billing
- Online
- Standard Reports
- Analysis
- Custom Reports
- Accounts Payable
- General Ledger
- Interface Accounting

**AOS Startup:** If the user is an Agent level user, the startup choice will be labeled "AOS Startup".

The screenshot shows the 'Setup Users' window for 'REAL/Easy BOS'. The 'General' tab is active. The fields are as follows:

- Login ID: A7
- Name: Hedda d'Pacque
- User Level: Agent (indicated by a red arrow)
- Password: [masked]
- Menu Access Level - General: 0
- Menu Access Level - Reports: 1
- Office: OFFICE1
- Agent/Staff ID: 7
- AOS Startup: Listings, In / Out Board, Reports (indicated by a red circle)

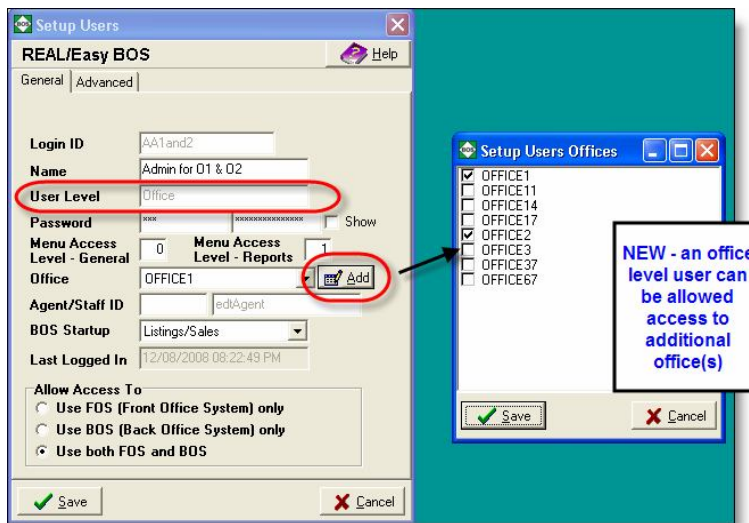
Agent level users will normally startup within the AOS “Listings” tab. Users can be started within these tabs:

- Listings
- In/Out Board
- Reports
- Custom Reports

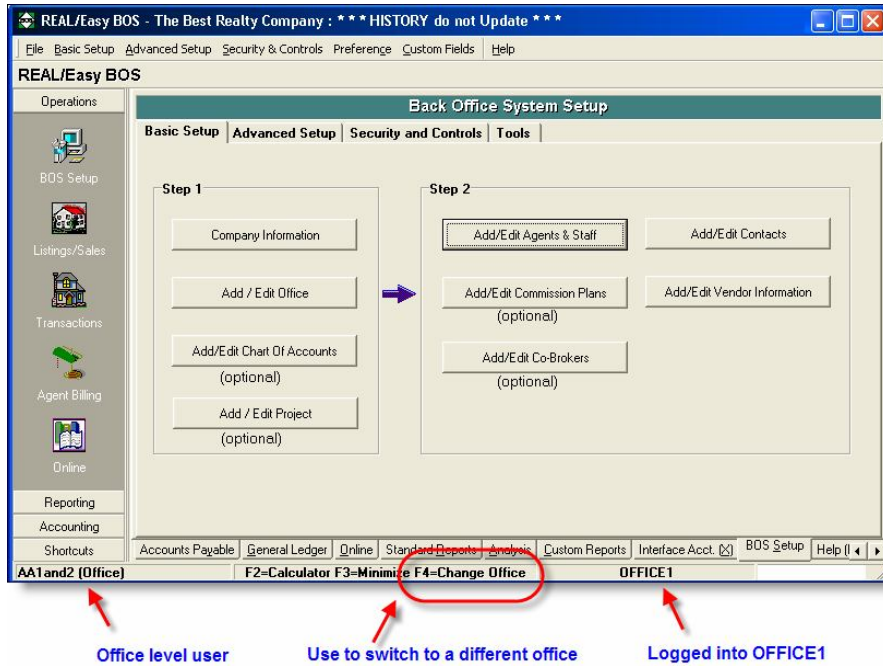
**Allow Access To** is used to control user access to both or either Back and Front office systems.

**Special Setup: For Office level users who need access to more than one office:**

An office level user is normally granted access to a single office. A new feature can now be utilized for certain users who may be accessing data from a small number of offices. This new option means it is no longer necessary to setup multiple user names for the person – now only one is needed.

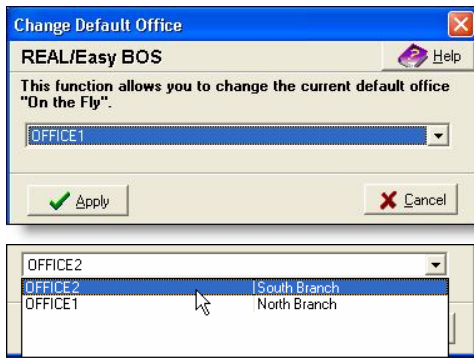


The Office level user above, for example, is assigned to login and access OFFICE1. However that user also needs access to OFFICE2. This is setup using the new “Add” button that displays the office list. The login office and other offices to be accessed are checked.



Above: example of a user who is allowed access into two offices – OFFICE1 and OFFICE2. As shown, the user is currently logged into OFFICE1 and can edit and view data in that office.

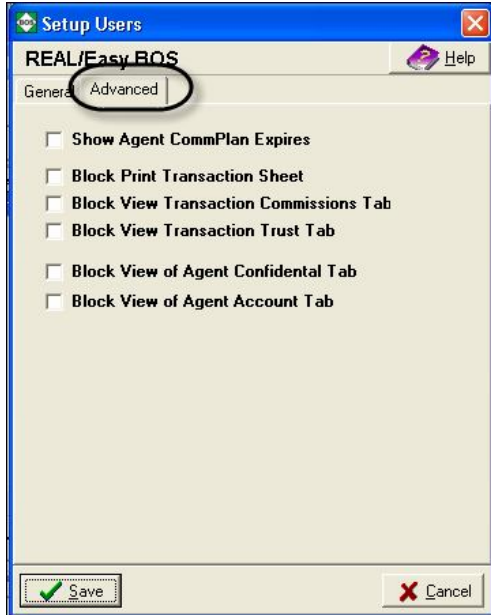
This user can view/edit data in OFFICE2 (the other office assigned) by clicking the F4 key to obtain this selection:



Operator selects another office and click's "Apply".



As shown above, "logged in office" is switched to "OFFICE2".

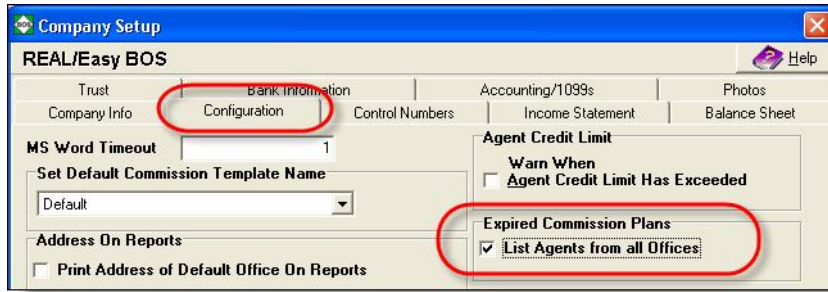
**“Advanced” tab:**

The new “Advanced” tab offers new controls that can allow or limit data viewing by the user. This tab only applies to BOS users. Each option is detailed below.

**Show Agent CommPlan Expires** – this new item must be checked if the user is to be given a list of agents who have expired commission plans when the user logs in. Previously this list was given to all users at login.

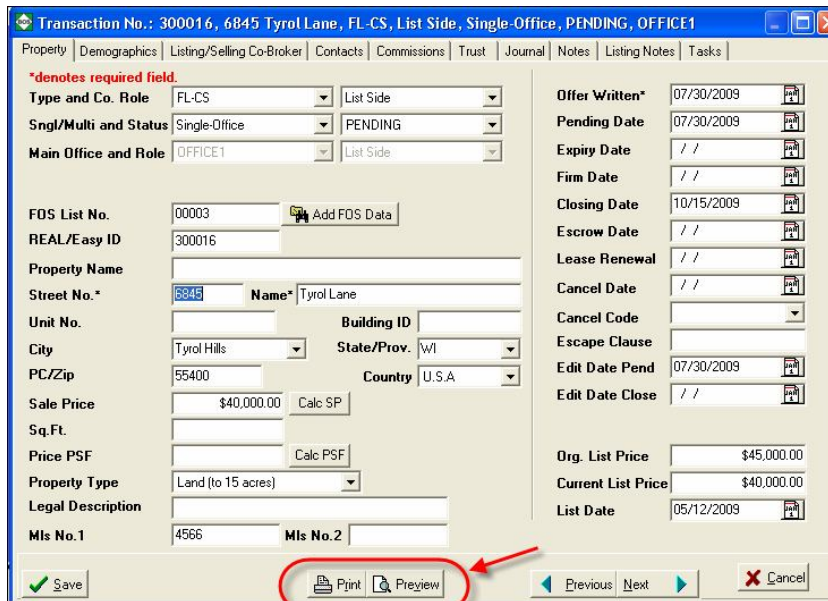
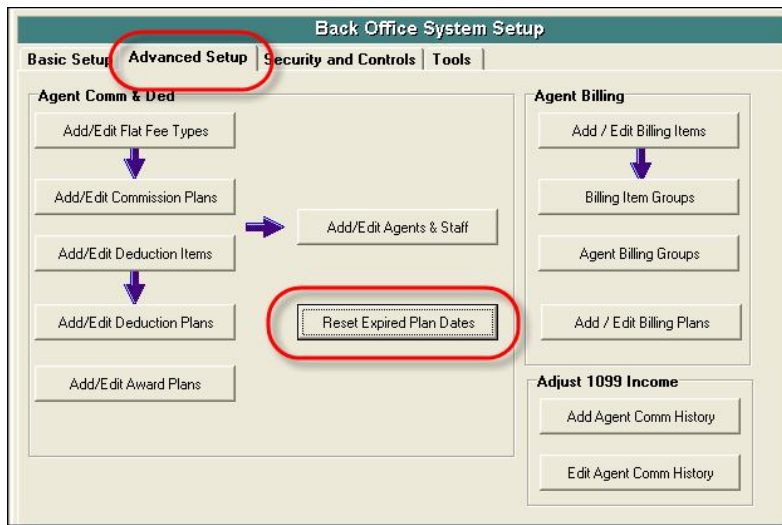


Above – example commission plan expired display. This can be displayed at login for a user when the new “Show Agent CommPlan Expires” option is activated. In the example above, agents from all offices are shown.



The Company Setup option above within “Expired CommissionPlans” is checked to display agents from all offices. Uncheck to just allow display and reset to be limited to a user’s login office only.

Note that the reset of agent expired plans function is also available within “Advanced Setup” as noted below:



### Advanced Tab: Block Print Transaction Sheet

Check this option for the user if you do not wish them to be able to print transaction income and commission split details. Note: The transaction sheet can be printed while editing or viewing a transaction's details or from the edit/view/close transaction browse lists. When this option is checked the transaction sheet Print and Preview buttons are not available.

### Advanced Tab: Block View Transaction Commissions Tab

This tab contains the income and commission splits. Check this option to remove viewing/editing of the commissions tab of a transaction.

Example: Commissions Tab "removed" for this user

The screenshot shows a window titled "Transaction No.: 9800007, 2210 North Grant Street FL-FS, FL-CS, Both Sides, Single-Office, PENDIN...". The window has several tabs: Property, Demographics, Listing/Selling Co-Broker, Contacts, Trust, Journal, Notes, and Listing Notes. The "Listing Notes" tab is active. The form contains various fields for property details, including Type and Co. Role (FL-CS), Sngl/Multi and Status (Single-Office), Main Office and Role (OFFICE1), FOS List No. (00017), REAL/Easy ID (00007), Property Name (Tibitt/Romano), Street No.\* (2210), Name\* (North Grant Street FL-FS), Unit No., Building ID, City (Milwaukee), State/Prov. (WI), PC/Zip (55632), Country, and Sale Price (\$149,900.00). There are also buttons for "Add FOS Data", "Calc SP", and "Calc PSF". On the right side, there are several date fields: Offer Written\* (02/07/2009), Pending Date (02/09/2009), Expiry Date (//), Firm Date (//), Closing Date (07/07/2009), Escrow Date (//), Lease Renewal (//), Cancel Date (//), Cancel Code (n/a), Escape Clause, Edit Date Pend (02/10/2009), and Edit Date Close (//). A red arrow points to the "Commissions" tab, which is not visible in the active view.

Above – example of a transaction view where viewing the Commissions tab is blocked.

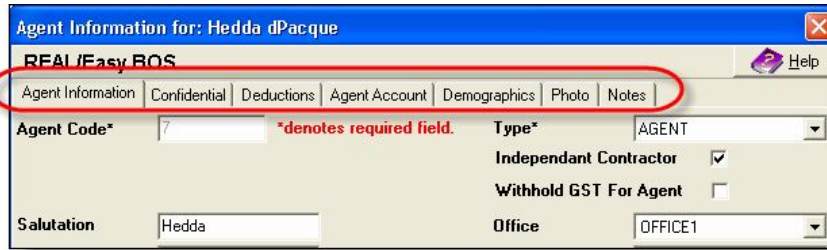
### Advanced Tab: Block View Transaction Trust Tab

Check this option to remove viewing/editing of the **Trust** tab of a transaction. This tab contains the trust deposit and disbursement details and commands to enter deposits and write escrow/trust checks. This setup works in the same manner as the Commission tab block.

### Advanced Tab: Block View of Agent Confidential Tab

Check this option to remove viewing of the agent/staff confidential and deductions tab. These tabs contain information such as the assigned commission plans and pay deduction items, social security numbers, federal ID numbers and other license and confidential information.

Normally a user would have access to these tabs of agent and staff information:



Example: user is blocked from viewing Confidential and Deductions tabs.



Above: example of a user viewing agent and staff information where the confidential and deductions tabs are blocked.

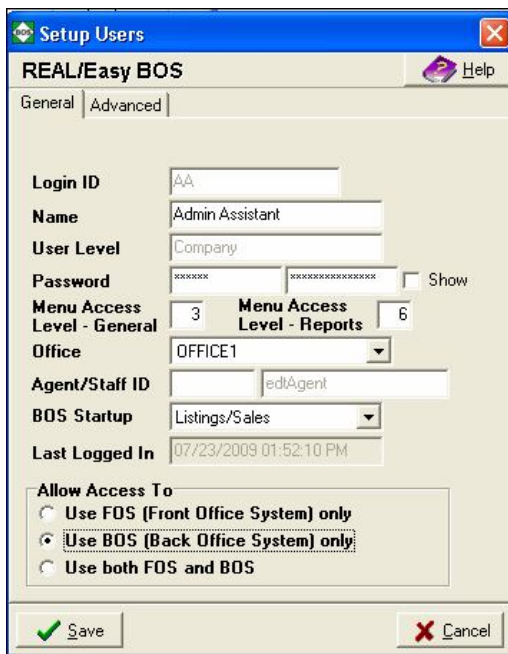
### Advanced Tab: Block View of Agent Account Tab

This option can block viewing of the agent account tab. This tab contains information such as bank account numbers, billing account balances and other accounting and interface setups. When this item is checked, the user will not see the “Agent Account” tab when editing or viewing Agent and Staff information.

## Example user setups:



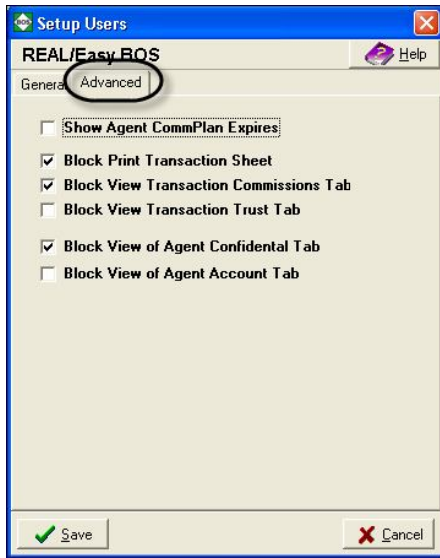
Following are a number of sample user setups. These are setup in the Best Realty learning company that is installed with the software.



User ID: AA, Admin Assistant is a company level user able to access data from all offices.

- With access to General commands access level 3 and up (cannot access General commands with access levels 0, 1, or 2).
- Access Report level 6 and up (cannot access Report commands with access levels 1 through 5, or less than 6).
- User is placed in the Listings/Sales module/desktop upon login. (user does most work in this module).
- User cannot access FOS.

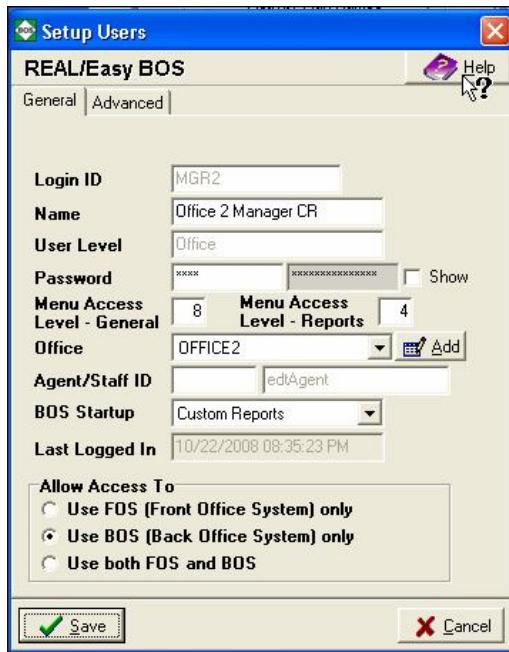
AA, Admin Assistant user continued:



Advanced tab settings restrict viewing of sensitive data for the AA user. AA cannot:

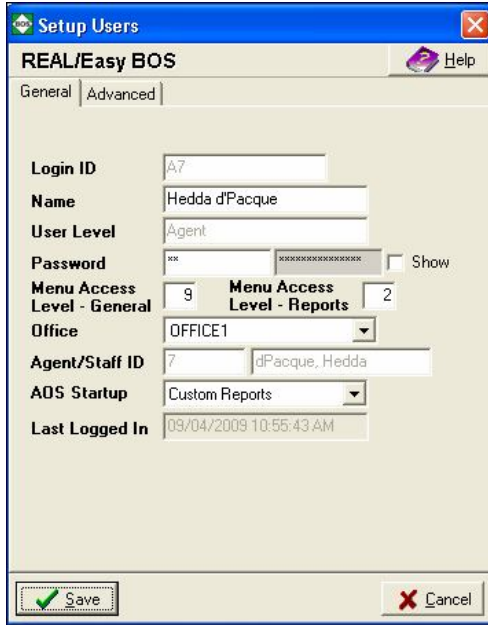
- Print transaction details including commission splits.
- View agent and other commission earnings information in a transaction.
- View agent commission plan and other assignments in the Agent Records.

MGR2 user – Office 2 Manager:



User ID MGR2 is setup for the Office 2 sales manager. User Level is “Office” and the user is assigned to viewing data only from “OFFICE2”. The manager cannot use many General commands (only those set to 8 or 9) but can use all report commands set to level 4 and higher.

Agent level (AOS) ID A7 – Hedda d’Pacque:



The screenshot shows the 'Setup Users' dialog box for 'REAL/Easy BOS'. The 'General' tab is selected. The user details are as follows:

Field	Value
Login ID	A7
Name	Hedda d'Pacque
User Level	Agent
Password	*** (masked) [Show checkbox]
Menu Access Level - General	9
Menu Access Level - Reports	2
Office	OFFICE1
Agent/Staff ID	7 (ID), d'Pacque, Hedda (Name)
AOS Startup	Custom Reports
Last Logged In	03/04/2009 10:55:43 AM

Buttons: Save (green checkmark), Cancel (red X).

This is an agent level user from OFFICE1. The user is connected to the Agent/Staff ID of “7” in the BOS/FOS agent records.

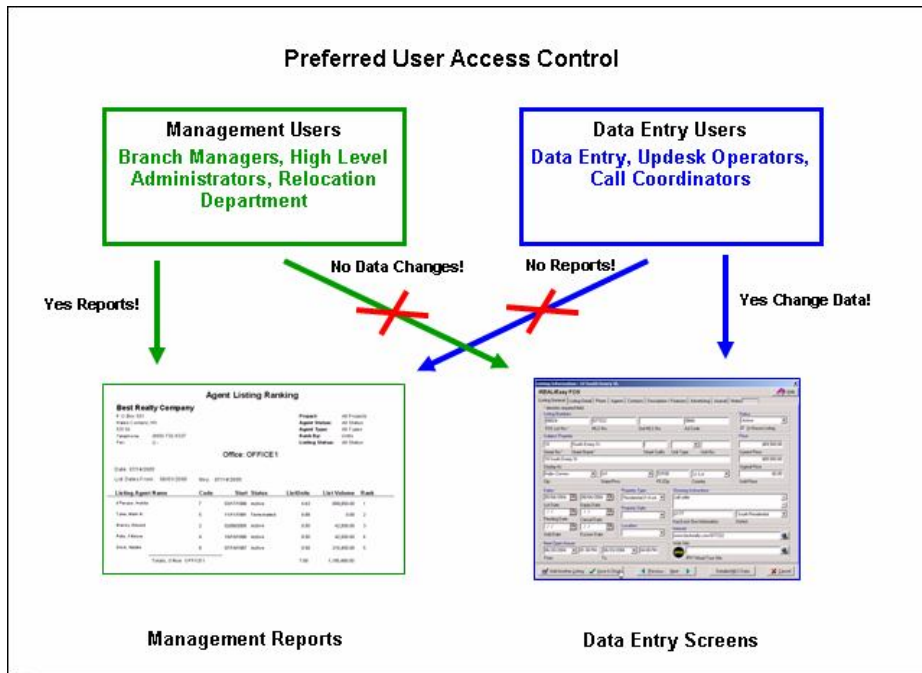
An agent level user can only use the AOS, Agent Office System.

Setup Menu Access command:



The “Setup Menu Access” command is used to control which commands can and cannot be accessed by the users. There are command lists for each of the REAL/Easy systems – BOS/FOS/AOS.

There are two types of Menu Items or commands : General and Report.



This distinction has been programmed in REAL/Easy to handle the two types of users for the system:

**Reporting:** Users such as owners and managers who need information about company revenue, expenses, earnings, productivity, but, who are not to be maintaining agent, listing, and transaction details.

The **Reports** menu items, highlighted in blue, apply only to reporting commands. In all systems, most of the reporting commands are grouped together in a reporting module or tab. Each report item is assigned a required level of 1 through 9.

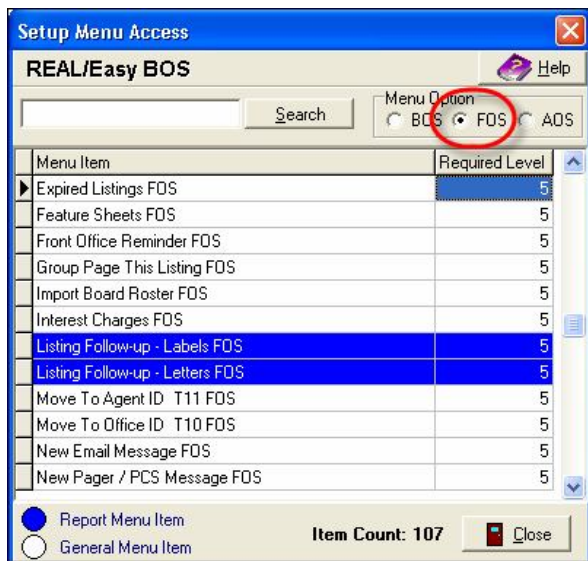
**General Admin:** Users who are entering and maintaining the agent, listing, sales, escrow/trust information, processing closings but who are not privy to earnings and company dollar production summaries and rankings.

The **General** menu item / applies to all add, edit, and other processing commands that are not reports. Each general item is assigned a required level of 0 through 9.

How the Item Level settings work:

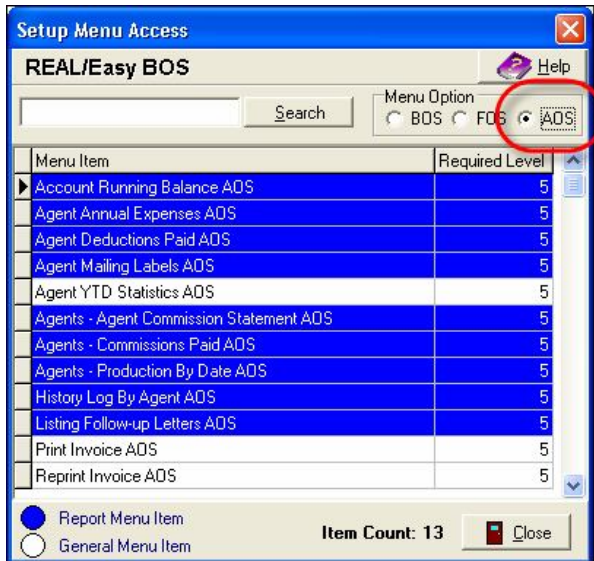
When a user clicks on a command, the system will allow the user to use the command if the item's required level is equal to or higher than the minimum level assigned in the user record.

For example if a user is assigned to a General level of 4 they would be able to use all General commands with a required level of 4 and above. However, that user would not be able to use General commands with a required level less than 4, such as "1099 / 1096" above assigned to a required level of 3.



Above, maintenance of the FOS command required levels is maintained in BOS's "Setup Menu Access". As in BOS, the FOS commands are one of two types: General commands that maintain data such as listings or preferences, and Reports (blue).

The required level for General commands can be set from 0 through 9, and 1 through 9 for the Report type commands.



There is also the ability to control use of the AOS - Agent Office System business, account reports, and statements. As with BOS and FOS, Agent level users are also assigned General and Report levels. When the agent level user is in AOS and chooses one of the above commands, the system will allow access if the command's required level from above, is less than or the same as the agent's assigned level.

## Edit Field Labels

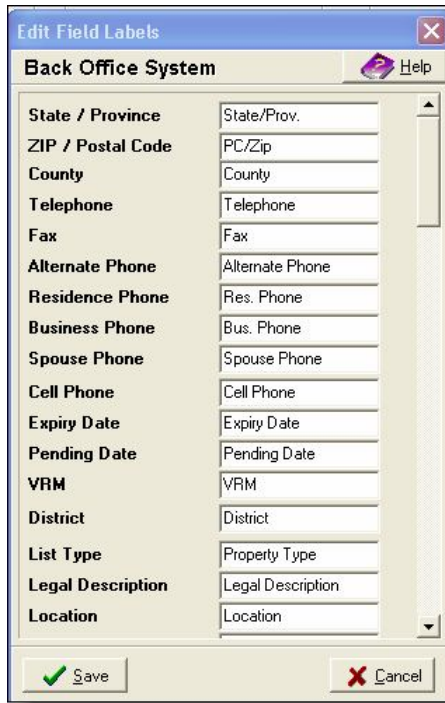


The user access setup of “Edit Field Labels” can be used to customize some of the user entry screens for agent, listing, and sales transaction data. For example for a listing or sale, the entry item “Legal Description” is available.

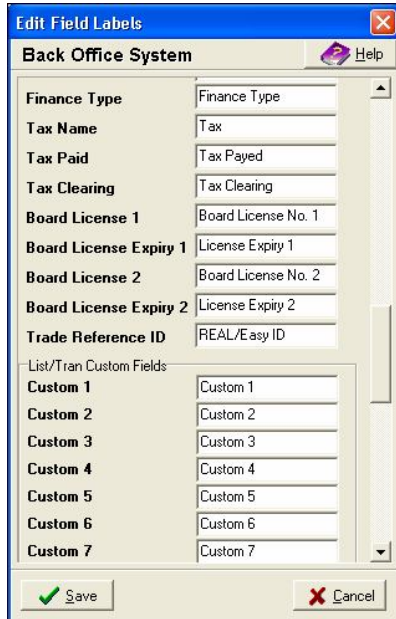
The screenshot shows a transaction entry form for 'Transaction No.: 300016, 6845 Tyrol Lane, FL-CS, List Side, Single-Office, PENDING, OFFICE1'. The form is divided into several sections: 'Property', 'Demographics', 'Listing/Selling Co-Broker', 'Contacts', 'Commissions', 'Trust', 'Journal', 'Notes', and 'Listing Notes'. The 'Legal Description' field is highlighted with a rounded rectangle. The form contains various fields for property details, dates, and prices.

Field	Value
Type and Co. Role	FL-CS
List Side	List Side
Sngl/Multi and Status	Single-Office
PENDING	PENDING
Main Office and Role	OFFICE1
List Side	List Side
FOS List No.	00003
REAL/Easy ID	300016
Property Name	
Street No.*	6845
Name*	Tyrol Lane
Unit No.	
Building ID	
City	Tyrol Hills
State/Prov.	WI
PC/Zip	55400
Country	U.S.A
Sale Price	\$40,000.00
Calc SP	
Calc PSF	
Sq.Ft.	
Price PSF	
Property Type	Land (to 15 acres)
Legal Description	
Mis No.1	4566
Mis No.2	
Offer Written*	07/30/2009
Pending Date	07/30/2009
Expiry Date	/ /
Firm Date	/ /
Closing Date	10/15/2009
Escrow Date	/ /
Lease Renewal	/ /
Cancel Date	/ /
Cancel Code	
Escape Clause	
Edit Date Pend	07/30/2009
Edit Date Close	/ /
Org. List Price	\$45,000.00
Current List Price	\$40,000.00
List Date	05/12/2009

This and some of the other item descriptions can be changed either to make it more clear or to change to another label if item is to be used to enter different information.



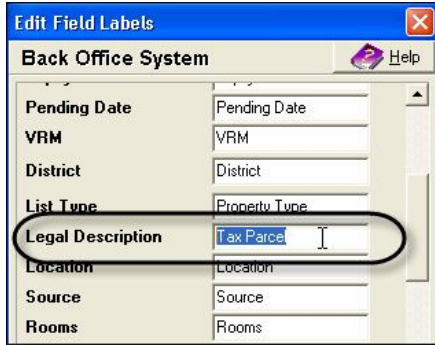
The Edit Field Labels screen has a field description column on the left and an alternate description entry item to the right. Selected fields within the agent, listing, and sales transaction screens are on the list.



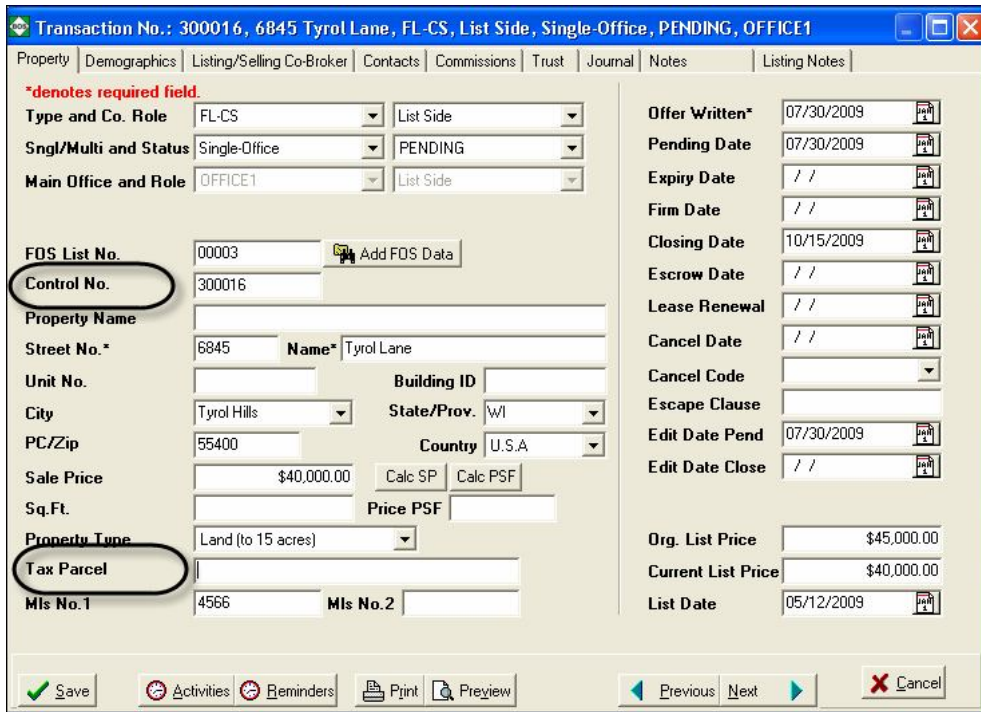
Labels that can be change include the listing and transaction “Custom” fields entered on the “Demographics” tab of the property record. There are 20 custom fields available for any use for the listings/transactions data entry.

Field labels can also be assigned to any of the Agent “Demographics” custom fields.

Examples:



Above are sample changes that have been made to the legal description and trade reference ID labels.



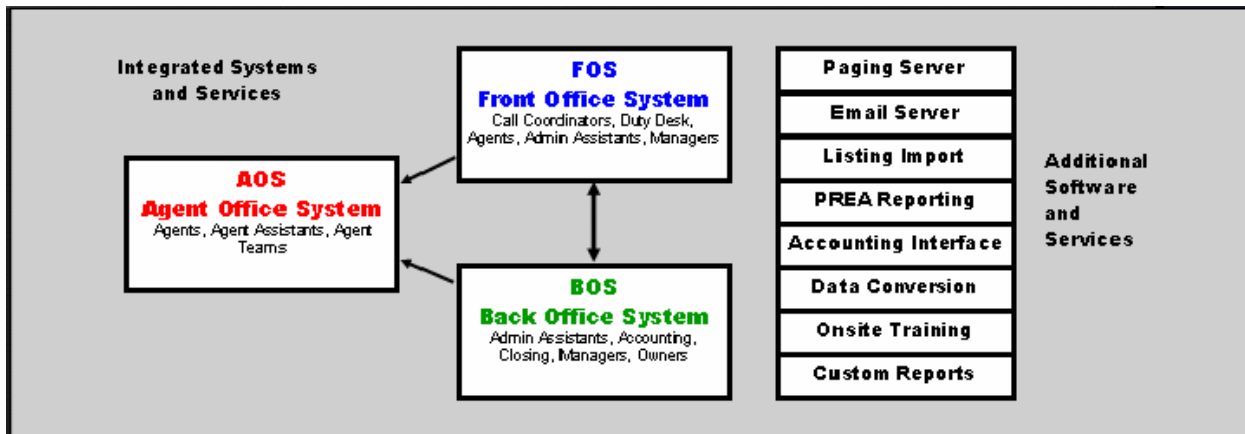
Above – screen item labels are changed to assist data entry staff.







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