

Help Increase Efficiency plus Lower Receivable Levels: *Email Agent Bills*



First Team Real Estate in California now emails 1500 agent bills each month using REAL/Easy.

Each agent receives an email with the statement and payment form attached as a pdf file.

When markets were hot, agent accounts receivable levels were at a minimum. Sales associates could pay their invoices or closing staff would recover expenses with commission check deductions.

However, as sales have slowed, companies have had to pay more attention to A/R levels. Billing needs to be more up-to-date and frequent.

If you are printing, stuffing,

addressing, stamping and mailing, this means more expense.

So customers have asked—“how can we email the bills to our agents?”

The answer is with the latest version of REAL/Easy. Built in to REAL/Easy is the ability to email bills to agents with a special “pdf splitter” program that can be used with REAL/Easy.

Step 1: Review Current Steps, Outline Solution

The first step is to review current or desired agent invoicing procedures. Most companies bill agents on a monthly basis.

This means keeping all billed items and payments current, then, at a specific date, printing and mailing invoices or statements to all agents.

For these companies and others who have not consistently invoiced agents, a monthly or

more frequent schedule can be outlined and setup for emailing.

The staff at REAL/Easy can show how existing statement formats can work, or can customize the statements for you. For example, following the statement detail and balance, a form can be added making it convenient for entering and faxing the payment by credit card to the central office.

Any statement format, message, or payment form can be accommodated.

To email them, the invoices are “printed” as usual. There are no new procedures, except a special “printer driver” is used that sends an email message and attaches the invoice as a pdf file to each agent. The staff at REAL/Easy can demonstrate how this works.

Step 2: Enter All Agent Email Addresses

A second step is to enter the email addresses for your agents.

Email 1	hdp@bestrealyusa.com
Email 2	dpacqueh7@yahoo.com

The one to use can be entered in either of the email address fields or in any of the 10 demographic fields.

If the email address to send

bills and reports is not email #1 for the agent, specify this

Email Bill To Option

on the “Agent Accounts” tab as shown above.

Check the entries by running the agent standard report R101 and selecting the new format “Invoice Email”.



Above—use the new Format “Invoice Email” in R101 to print the list.



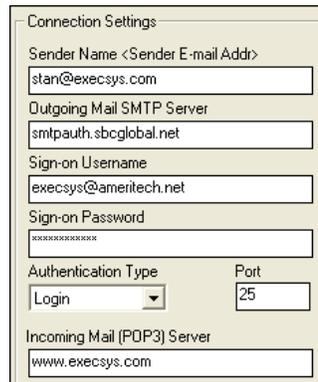
Step 3: Purchase PDF Plug-in and Setup

To implement emailing, a special pdf email and splitter program called PDFeXPLODE is purchased and installed on your computer.

REAL/Easy will email you a link so you can order and install this \$495 package.

The program is installed on your PC or server. REAL/Easy can login to your station to assist.

PDFeXPLODE setup instructions are included in your 14.12 update training guide. Your IT person can follow them step-by-step including



testing the connection.

Also, REAL/Easy can login to your

computer and setup PDFeX- PLODE.

Note, the program is setup to utilize your smtp mail server, so you/we must have these addresses as well as any passwords.

The Staff At REAL/ Easy will help you or your IT person install and setup. These procedures are also documented in the version 14.12 update training book.

Step 4: Test Statement Emailing

The next step is to select a statement format or create a custom one. REAL/Easy will help with this.



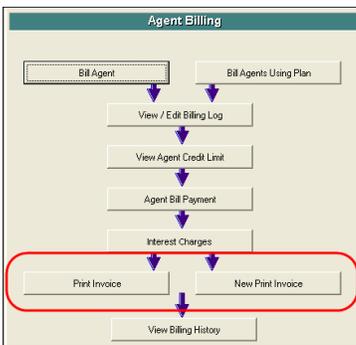
When the statement program (it is a Crystal Report) is ready, a test email "Print Invoice" is performed. This is the same command you use to print the invoices on paper.



Usually a number of sample statements are sent to admin staffers for this review. It's pretty easy to do, just select the "PDFeXPLODE" printer as shown above.

When the email test is successful, the staff can then begin to email the agent statements once all email addresses are entered for the agents.

Step 5: You're Ready to Save and Collect \$\$



For current invoice printing, both the "Print Invoice" and "New Print Invoice" commands will work.

Each agent will receive the email having a title describing the content and that it is from your company. The email body will instruct to open the attachment (pdf) to print. For added benefit, the Reprint Invoice (for agents who loose in-



voices) and other account reports can also be emailed. These are reports R713, R174, and R175 in "Standard Reports".