



REAL/Easy AOS Learning Tour

Agent Office Sales

Listings, Contacts/Leads, Showings, Listing and Sales
Production Reports

Copyright

The contents of this manual are the protected property of and embody confidential information proprietary to Executive Systems Ltd. Any reproduction, copy, transfer, adaptation or modification of this manual without the express written consent of Executive Systems is strictly prohibited.

Disclaimer and Limitation of Liability

The Software described in this manual is provided by Executive Systems Ltd. pursuant to a license agreement, as contained in the Software upon installation. The Software may be used only in accordance with the terms of the license agreement.

Executive Systems makes no warranty as to the accuracy of the contents of this manual as it relates to the Software. Executive Systems assumes no responsibility for any loss or claims by third parties which may arise through the use of the Software. Executive Systems assumes no responsibility for any damage or loss caused by deletion of data as a result of malfunction, power failure or repairs. Be sure to make backup copies of all important data on other media to protect against data loss.

Trademarks

REAL/Easy BOS (Back Office System) and REAL/Easy FOS (Front Office System) are trademarks of Executive Systems Ltd.

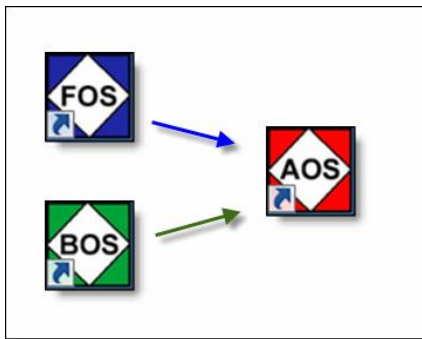
Copyright © 2012 Executive Systems Ltd. All Rights Reserved. Printed in U.S.A. This document may not, in whole or in part, with the exception of the entry forms, be copied, photocopied, reproduced, adapted or modified to any medium without the express written consent of Executive Systems.

1-800-732-5327

Welcome to the REAL/Easy Agent Office Sales Program



Welcome to REAL/Easy Agent Office Sales, or AOS. AOS is an add-on module for BOS – Back Office System and FOS – Front Office System.



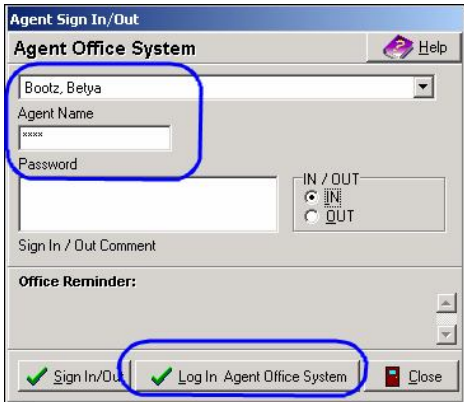
AOS enables company agents to access information about listings, showings, leads, seller and other contacts maintained by the FOS system. Agents can also access closed sales and pipeline production as well as pay and agent account information maintained by the BOS system.

This reference provides an overview of Agent Office Sales.

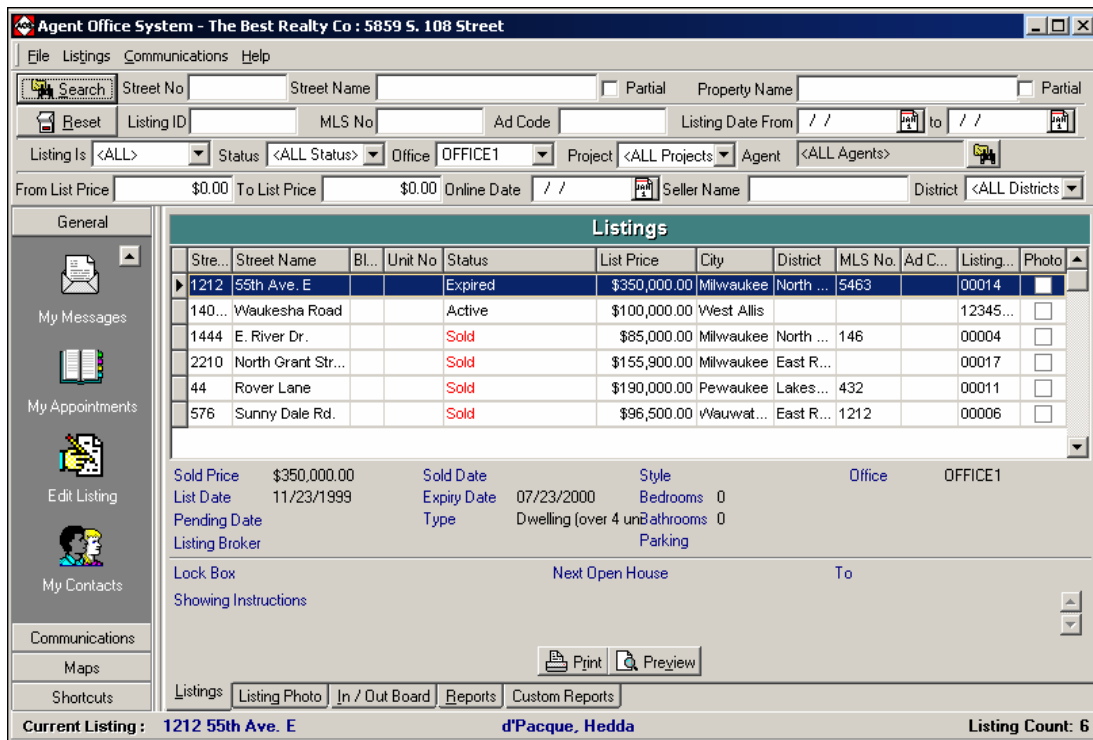
Agent Office Basics - AOS



Start AOS from the desktop.

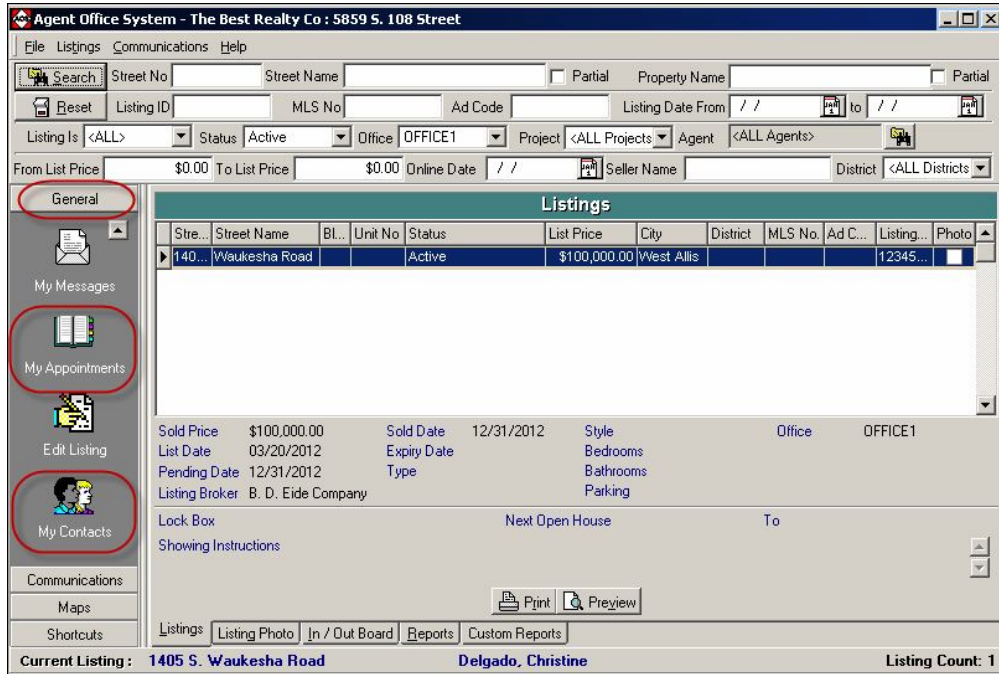


Select user, enter password, and click “Log In Agent Office System”.



This is the AOS desktop.

Agent Can view Appointments and Contacts that have been entered within FOS and BOS:



Example below viewing contacts. View any type, e.g. “New Leads”.



How to View the Active Listings

Agent Office System - Best Realty Inc : 5859 S. 108th Street

File Listings Communications Reports Help

Search Street No Street Name Listing ID MLS Ad Code

Status Active District <ALL Districts> Office OFFICE1 Project <ALL Projects> Agent <ALL Agents> Reset All

Street No	Street Name	Status	List Price	City	District	MLS No.	Ad Code	Listing ID	Photo
1	Manchester Ct	Active	\$0.00	Madison	n/a				<input type="checkbox"/>
126	N Spooner	Active	\$0.00	Madison	n/a				<input type="checkbox"/>
1610	Wheeler Rd 3F	Active	\$0.00	Madison	n/a				<input type="checkbox"/>
222	Llanos St	Active	\$0.00	Verona	n/a				<input type="checkbox"/>
3303	Valley creek	Active	\$0.00	Middleton	n/a				<input type="checkbox"/>
5904	Hammersley	Active	\$0.00	Madison	n/a				<input type="checkbox"/>
7501	Welton Dr	Active	\$0.00	Madison	n/a				<input type="checkbox"/>

Sold Price \$219,900.00 Sold Date 04/12/2002 Style Office OFFICE1
 List Date Expiry Date Bedrooms 0
 Pending Date 04/12/2002 Type n/a Bathrooms 0
 Listing Broker Parking

Lock Box Next Open House To

Showing Instructions

Print Preview

Current Listing: 1 Manchester Ct Buren, Rosemary Van Listing Count : 11

View using the listing browse screen. Can Print a report like below with “Print” or “Preview”.

Listing Inventory

Best Realty Inc
 5859 S. 108th Street
 Hales Corners, WI
 53130
 Telephone: (800) 732-5327
 Fax: (414) 425-9267

Benzschawel, Nancy L.							
List No.	MLS No	Status	Subject Property	District	Price		Expiry
22111		Active	1610 Wheeler Rd 3F	n/a	\$0.00	12/30/1899	12/30/1899
Total Volume						0.00	

Graves, Georgia J.							
List No.	MLS No	Status	Subject Property	District	Price		Expiry
22309		Active	N 7523 Hwy 44	n/a	\$0.00	12/30/1899	12/30/1899
Total Volume						0.00	

Hayes, Jac Anne							
List No.	MLS No	Status	Subject Property	District	Price		Expiry
22285		Active	902 Waban Hill	n/a	\$0.00	12/30/1899	12/30/1899
Total Volume						0.00	

Kammer, Bonita Stein							
List No.	MLS No	Status	Subject Property	District	Price		Expiry
22268		Active	3303 Valley creek	n/a	\$0.00	12/30/1899	12/30/1899
Total Volume						0.00	

Viewing Your Own Listings

Agent Office System - Best Realty Inc : 5859 S. 108th Street

File Listings Communications Reports Help

Search Street No Street Name Listing ID MLS Ad Code

Status <ALL Status> District <ALL Districts> Office OFFICE1 Project <ALL Projects> Agent Bootz, Betya Reset All

Street No	Street Name	Status	List Price	City	District	MLS No.	Ad Code	Listing ID	Photo
1	Manchester Ct	Active	\$219,900.00	Madison	n/a				<input type="checkbox"/>
11	N State	Active	\$150,000.00						<input type="checkbox"/>
126	N Spooner	Active	\$100,000.00	Madison	n/a				<input type="checkbox"/>

Sold Price \$219,900.00 Sold Date 04/12/2002 Style Office OFFICE1
 List Date Expiry Date Bedrooms 0
 Pending Date 04/12/2002 Type n/a Bathrooms 0
 Listing Broker Parking

Lock Box Next Open House To

Showing Instructions

Print Preview

Current Listing: 1 Manchester Ct Bootz, Betya Listing Count: 3

Set "Agent" to your name, and click search. Also, below, you can print a report.

Listing Inventory

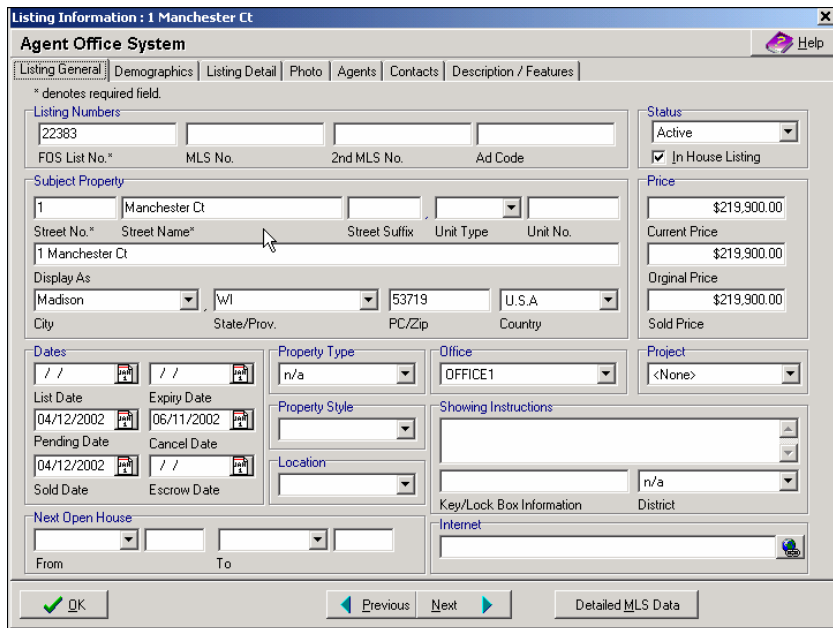
Best Realty Inc
 5859 S. 108th Street
 Hales Corners, WI
 53130
 Telephone: (800) 732-6327
 Fax: (414) 426-9267

Bootz, Betya							
List No.	MLS No	Status	Subject Property	District	Price		Expiry
22383		Active	1 Manchester Ct	n/a	\$219,900.00	12/30/1899	12/30/1899
22200		Active	126 N Spooner	n/a	\$100,000.00	01/12/2006	01/16/2007
2000002		Active	11 N State		\$150,000.00	01/28/2006	04/28/2006
Total Volume					469,900.00		

Viewing the Details of a Listing



Click "View Listing Detail" left tool.



Detail of listing shown above – there are a number of "tabs" of information.

Printing / Viewing Reports

The screenshot shows a software interface titled "Reports" with three main columns of report options:

- Company:** Phone/eMail List R101, Birthday List R102, Listings R301, Appointments, Messages, Duty Log.
- Agent Business:** Followup Labels R522, Followup Letters R532, Commissions Paid R111, Comm. Statement R112, Production By Date R122, Agent YTD Statistics.
- Agent Account:** View Current Invoice, History Log By Agent R711, Running Balance R715, Reprint One Invoice R716, Reprint Invoices R717, Annual Expenses R131, Deductions Paid R134.

At the bottom, there is a navigation bar with tabs: Listings, Listing Photo, In / Out Board, **Reports** (circled in red), and Custom Reports.

There is a separate reporting area. Some, like listings are show the entire company's inventory. Others for "Agent Business" and "Agent Account" pertain only to the agent who is logged in.

Example - running a report:

Listings R301

The "Listings By" dialog box is shown with the following settings:

- Street Name: Bootz, Betya Agent (circled in red)
- Status: Active (circled in red)
- From List Date: 01/01/2006 (circled in red)
- To List Date: 12/31/2006 (circled in red)
- Report Type: Detailed (circled in red)
- Group By Agent: (circled in red)
- Include Seller Information: (circled in red)

Buttons at the bottom include Print, Preview, Default, and Close.

Above example, details for all active listings for the agent.

Listing Inventory

Best Realty Inc

5859 S. 108th Street
 Hales Corners, WI
 53130
 Telephone: (800) 732-5327
 Fax: (414) 425-9267

Street <ALL Streets>
 Agent Bootz, Betya
 Status Active
 District <ALL Districts>
 Type <ALL Types>
 Project <ALL Projects>
 Office OFFICE1
 From List Price
 To List Price 999999999
From List Date 01/01/2006
To List Date 12/31/2006

Bootz, Betya									
List No.	MLS No	Status	Subject Property	District	Price	List Date	Agents	DOM	
22200		Active	126 N Spooner	n/a	\$100,000.00	01/12/2006	Bootz, Betya	377	
Type	n/a		Style			Office	OFFICE1		
Seller			Tel	()-	Fax				
2000002		Active	11 N State		\$150,000.00	01/28/2006	Bootz, Betya	361	
Type			Style			Office	OFFICE1		
			Tel		Fax				
22383		Active	1 Manchester Ct	n/a	\$219,900.00	03/02/2006	Bootz, Betya	328	
Type	Commercial		Style			Office	OFFICE1		
Seller		Ball, Stacy & Kevin	Tel	()-	Fax				

Total Volume 469,900.00

Reprint One Invoice R716

Print Agent Invoice Statement

The Best Realty Co

5859 S. 108 Street
 Hales Corners, WI
 53130
 Telephone: (800) 732-5327
 Fax: () -

Invoice Number: 8024
 Invoice Date: 12/31/2011
 Due Date: 01/15/2012

Hedda dPacque

300 S Washington
 Milwaukee, WI
 53200

(ID : 7)
 (OfficeID : OFFICE1)
 (form : agentreprintinvoiceUS_acct 13)

Date	Item	Reference	Amount	Payments	Balance
Balance Forward For All Non-Accounts:					1,311.00
12/12/2011	ADV	Advertising Program Ads for Nov 2011 ADVPRO N	120.00		1,431.00
Totals	Hedda dPacque		120.00	0.00	1,431.00

Example: invoice viewed/reprinted by the agent. Many invoice formats are available and the format can also be customized.

Commissions Paid R111

Example below – Agent can view commission paid details for any time period.

Agent Commissions Paid - Based on Paid Date

Closed or Paid in Office: OFFICE1
 North Branch

The Best Realty Co
 5859 S. 108 Street
 Hales Corners, WI 53130
 Telephone: (800) 732-5327

Agent Status: <ALL Status>
 Agent Type: <ALL Types>
 Project: <ALL Projects>
 Tran Status:

Hedda dPacque (7)

TranID	Status	Paid Date	Address	Check#	NAGCI	Comm Earnings	Admin Plus Tran Fee	Bonus Amount	Override	Net Comm Amount	A/R Recovery	Remized Ded	Check Net
9800003	PENDING	05/14/2011	510 CL-FS Mendota	0	3,150.00	2,635.50 84 %	0.00	0.00	0.00	2,635.50	0.00	0.00	15238
9800002	FIRM	05/19/2011	1669 Fairfax Ave.	2018	1,494.90	747.45 50 %	0.00	0.00	0.00	747.45	311.00	0.00	43645
300021	BACKUP	06/02/2011	Jurim Case Deposit	300371	12,000.00	7,200.00 60 %	0.00	0.00	0.00	7,200.00	155.00	3,755.00	3,290.00
3		Total			16,644.90	10,582.95	0.00	0.00	0.00	10,582.95	466.00	3,755.00	3,878.83

Production By Date R122

Below Example – Agent can view all production for any time period, Written, Closed, Pending sales:

Production by Closing Date													
dPacque, Hedda (7)													
Production in Office(s): OFFICE1													
North Branch													
The Best Realty Co					Agent Status: <ALL Status>								
5859 S. 108 Street					Agent Type: <ALL Types>								
Hales Corners, WI 53130					Project: <ALL Projects>								
Telephone: (800) 732-5327					Status: FIRM CLOSED PENDING								
TranID	Status	Closing Date	Address	Selling Price	GCI	AGCI	NAGCI	Comm Earnings	Admin. Amount	Tran Fee	Bonus Amount	Override	Net Comm Amount
9800002	F	10/02/2004	1669 Fairfax Ave.	75,500	1,510.00	1,510.00	1,494.90	747.45	0.00	0.00	0.00	0.00	747.45
9800002	F	10/02/2004	1669 Fairfax Ave.	75,500	1,510.00	1,510.00	1,434.50	860.70	0.00	0.00	0.00	0.00	860.70
9800011	C	10/11/2004	4306 N. Kier Dr.	75,000	2,625.00	2,625.00	2,625.00	1,312.50	0.00	0.00	0.00	0.00	1,312.50
9800011	C	10/11/2004	4306 N. Kier Dr.	75,000	2,625.00	2,100.00	2,100.00	1,260.00	0.00	0.00	0.00	0.00	1,260.00
9800014	P	10/14/2010	13303 Robley Street	222,500	4,450.00	3,560.00	3,346.40	2,977.92	0.00	0.00	0.00	0.00	2,977.92
300018	C	10/07/2011	10 Emery Street, Unit 16	100,000	1,500.00	1,500.00	1,410.00	846.00	0.00	0.00	0.00	0.00	846.00
9800013	C	10/13/2011	RR 2, Box 416	100,000	10,000.00	10,000.00	9,400.00	4,700.00	0.00	0.00	0.00	0.00	4,700.00
9800004	C	10/19/2011	820 Cherry Orchard Lane	100,000	10,000.00	10,000.00	8,400.00	4,200.00	0.00	0.00	0.00	0.00	4,200.00
300026	P	10/19/2011	6845 Tyrol Lane	200,000	3,000.00	2,250.00	2,115.00	1,269.00	0.00	0.00	0.00	0.00	1,269.00
9800003	P	12/30/2011	510 CL-FS Mendota Ave.	300,000	4,500.00	3,600.00	3,150.00	2,635.50	0.00	0.00	0.00	0.00	2,635.50
8			Total	1,323,500	41,720.00	38,655.00	35,475.80	20,809.07	0.00	0.00	0.00	0.00	20,809.07

Agent YTD Statistics

Stats : Betya Bootz Plan: 90/10 01/01/2006 - 12/31/2006

Agent Office System Help

Date by: **CLOSING** From Date: 01/01/2006 To Date: 03/31/2006

Include Only: Closed Sales Calculate

Include: All Commission Records Only Level Earning Commission Records

Include Override Earnings: No Yes

1 Allocated GCI	\$21,340.50	11 List Volume	\$216,175.00
2 Allocated AGCI	\$21,340.50	12 Sell Volume	\$495,239.00
3 Allocated NAGCI	\$21,340.50	13 Sales Volume	\$711,414.00
4 Gross Commission Earnings	\$19,206.46	14 List Units	2.00
5 Company Share	\$2,134.04	15 Sell Units	3.00
6 Total Admin. Fees	\$0.00	16 Total Units	5.00
7 Total Transaction Fees	\$0.00		
8 Total Bonus Earned	\$0.00		
9 Net Commission Earnings	\$19,206.46		
10 Net Check Amount	\$18,781.21		

Print Detail Preview Detail

Close Previous Next

Agent YTD Volume Summary

Best Realty Inc
 5859 S. 108th Street
 Hales Corners, WI 53130
 Telephone: (800) 732-5327

Agent: Betya Bootz
 From Date: 01/01/2006
 To Date: 03/31/2006
 Dates By: CLOSING

CLOSING	Trans. Address I.D.	Status	Transaction Total GCI	Agent GCI	Transaction Total AGCI	Agent AGCI	Transaction Total NAGCI	Agent NAGCI
Betya Bootz								
01/20/2006	9907302 128 Shawn Ave	CLO SED	6,537.00	3,268.50	6,537.00	3,268.50	6,537.00	3,268.50
List Agents: -	Sell Agents: 2 List Referral: -	Sell Referral: -	List %: -	Sell %: 90.0				
03/10/2006	9907345 7438 Cedar Creek Trl	CLO SED	12,147.00	6,073.50	12,147.00	6,073.50	12,147.00	6,073.50
List Agents: 2	Sell Agents: 2 List Referral: -	Sell Referral: -	List %: 90.0	Sell %: 90.0				
03/24/2006	9907382 5 Canvasback Cir	CLO SED	17,100.00	8,550.00	17,100.00	8,550.00	17,100.00	8,550.00
List Agents: -	Sell Agents: 2 List Referral: -	Sell Referral: -	List %: -	Sell %: 90.0				
03/31/2006	9907380 625 Paradise	CLO SED	6,897.00	3,448.50	6,897.00	3,448.50	6,897.00	3,448.50
List Agents: 2	Sell Agents: - List Referral: -	Sell Referral: -	List %: 90.0	Sell %: -				
Total			42,681.00	21,340.50	42,681.00	21,340.50	42,681.00	21,340.50

Agent Annual Expenses

Agent Annual Expenses [X]

Agent Office System [Help]

Agent:

As at year ending: [Calendar Icon]

Project:

Office:

[Print] [Preview] [Defaults] [Close]

Agent Annual Expenses

Best Realty Inc
 5859 S. 108th Street
 Hales Corners, WI
 53130
 Telephone: (800) 732-5327
 Fax: (414) 425-9267
 Print Date: 01/24/2007

Agent: Betya Bootz
 Year Ending: 12/31/2006
 Project: <ALL Projects>
 Office: OFFICE1

Betya Bootz

Item Code	Description	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Total
6150	Advert Other	48.75	0.00	0.00	18.76	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	67.51
6151	Technology Fee	60.00	60.00	0.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	240.00
6501	Color Copies	10.50	5.25	0.00	25.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	40.75
6700	E & O	0.00	0.00	0.00	287.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	287.50
6900	MLS	75.00	0.00	0.00	75.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	150.00
8900	Misc Expense	0.00	0.00	0.00	38.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	38.38
Total		194.25	65.25	0.00	564.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	824.14

Agent Commission Statement

Agent Commission Statement [X]

Agent Office System [Help]

As of: 07/01/2006 [Calendar]

Agent: Bootz, Betya [Dropdown]

Office: OFFICE1 [Dropdown]

Include only Agents

Generate report by Agent's Anniversary
And Award Plan Periods Only

[Print] [Preview] [Close]

Agent Commission Statement					
Best Realty Inc					
5859 S. 108th Street Hales Corners, WI 53130 Telephone: (800) 732-5327 Fax: (414) 425-9267					
Betya Bootz		Agent ID: 5281		Office ID: OFFICE1	
5980 S Forest Home Milwaukee, WI 53130				Start: 06/02/2005 Full Time	
Commission Plan: 90/10		Commission Plan Period: 01/01/2006 to 12/31/2006			
YTD Gross Commissions Paid For Commission Plan		\$110,953.41			
YTD Gross Commissions For Commission Plan		\$102,961.33			
Level	% To Agent	Bonus (\$)	Bonus (%)	Dollar Amount	Comment
1	90.00 %	0.00	0.00 %	999,999,999.00	Level Attained

Phone/eMail List R101

Agent Telephone List

The Best Realty Co

5859 S. 108 Street
Hales Corners, WI
53130
(800) 732-5327

Office: OFFICE 1

North Branch

Project: <ALL Projects >
A/E: AGENT
Position: All Types

Name	Status	Cell No.	Business No.	Ext.	Fax No.	Email
dPacque, Hedda	A	(414) 444-4407	(414) 543-5361		(414) 777-0008	jjwaugh@prunw.com
Shaw, Lola	A	-	(414) 543-5361		(414) 222-3024	lshaw@prunw.com
Truax, Bernie	A	(414) 444-4423	(414) 543-5361		(414) 222-2278	stan@execsys.com
West, Neal	A	-	(414) 543-5361		(414) 543-5650	ryoubine@bestrealtyco.com

Agent Deductions Paid

Agent Deductions Paid

The Best Realty Co

5859 S. 108 Street
Hales Corners, WI
53130

Telephone: (800) 732-5327
Fax: (-)

North Branch (OFFICE1)

Deduction Item: <ALL Deductions>

Project: <ALL Projects>

Credited Office: OFFICE1

Deduction	Amount	Date	Transaction ID
dPacque, Hedda (7)			
39 Client Chb	39.00	05/14/2011	9800003
39 Client Chb	39.00		
57	0.00	10/01/2004	9800011
57	100.00	08/31/2009	9800004
57	200.00	09/06/2009	9800011
57	100.00	09/09/2009	9800013
57 Advance	57.00	05/14/2011	9800003
57 Advance #2	57.00	05/14/2011	9800003
57 Advance	0.00	05/19/2011	9800002
57 Advance	200.00	06/02/2011	300021
57 Advance	714.00		
Total			
	753.00		

Customized reports can be provided as part of our service. Agents can then access within AOS:

The screenshot shows a software interface with a search bar at the top left containing the text "Search" and "Name" followed by an empty input field. Below the search bar is a table with three columns: "Name", "Level", and "Office". The first row of the table is highlighted in blue and contains the text "Agent Earnings", "Agent", and an empty cell. Below the table, there is a large text area with the message: "Custom reports can also be written for you for your agents. Or we can teach you how to build them." At the bottom left of the interface is a "Run" button with a play icon. At the bottom of the interface is a navigation menu with several tabs: "Listings", "Listing Photo", "In / Out Board", "Reports", and "Custom Reports". The "Custom Reports" tab is circled in red.

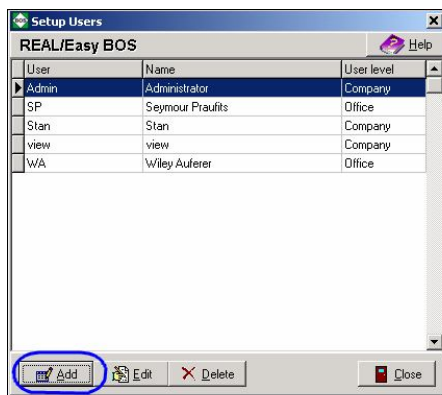
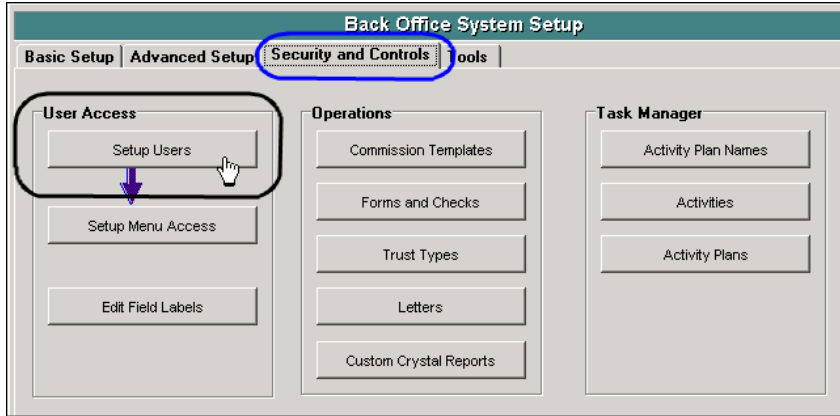
Name	Level	Office
Agent Earnings	Agent	

Custom reports can also be written for you for your agents. Or we can teach you how to build them.

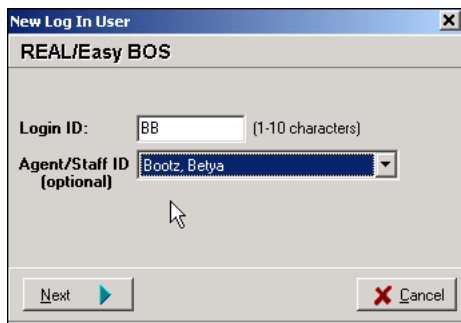
Run

Listings Listing Photo In / Out Board Reports Custom Reports

AOS users are setup within the BOS system.



Click the “Add” button



Enter a login ID and then hook the login ID to the user in your agent and staff table.

Click “Next”.

AOS users are setup within the BOS system (cont'd)

New Log In User

REAL/Easy BOS

Login ID: BB

Agent/Staff ID: 5281 | Bootz, Betya

User Level: Agent

Name: Bootz, Betya

Office: OFFICE1

Next | Cancel

Set the user level to “Agent”. The Name and Office should be completed for you, click “Next”

Setup Users

REAL/Easy BOS

Login ID: BB

Name: Bootz, Betya

User Level: Agent

Password: *****

Menu Access Level - General: 5

Menu Access Level - Reports: 5

Office: OFFICE1

Agent/Staff ID: 5281 | Bootz, Betya

Save | Cancel

Enter the agent/user’s password.