

Creating The Ultimate Paperless Office

Introduction:

We will be learning how to utilize the computer as your office- exclusively.

1. There are four major parts of creating the ultimate paperless office
 - a. Creating a systematic filing system where all documents are stored for clients.
 - b. Receiving all faxes online.
 - c. Writing all documents in PDF format.
 - d. Signing on the computer screen.
2. Utilizing Microsoft Outlook- To sync all calendars, contacts and emails to all devices.
3. Record Keeping, Cleaning up & Using High Tech Devices.

CONCLUSION:

Utilizing the tools you learn today, practiced until perfect, will save you time, efforts, money and energy. You do not need to be “techie” to understand these system, just willing to keep an open mind of how you can utilize your computer properly in your real estate career!

Thought of the Day: "Technology will not replace REALTORS[®], but REALTORS[®] with technology will replace REALTORS[®] without technology." by John Tuccillo, former Chief Economist for the NATIONAL ASSOCIATION OF REALTORS[®]

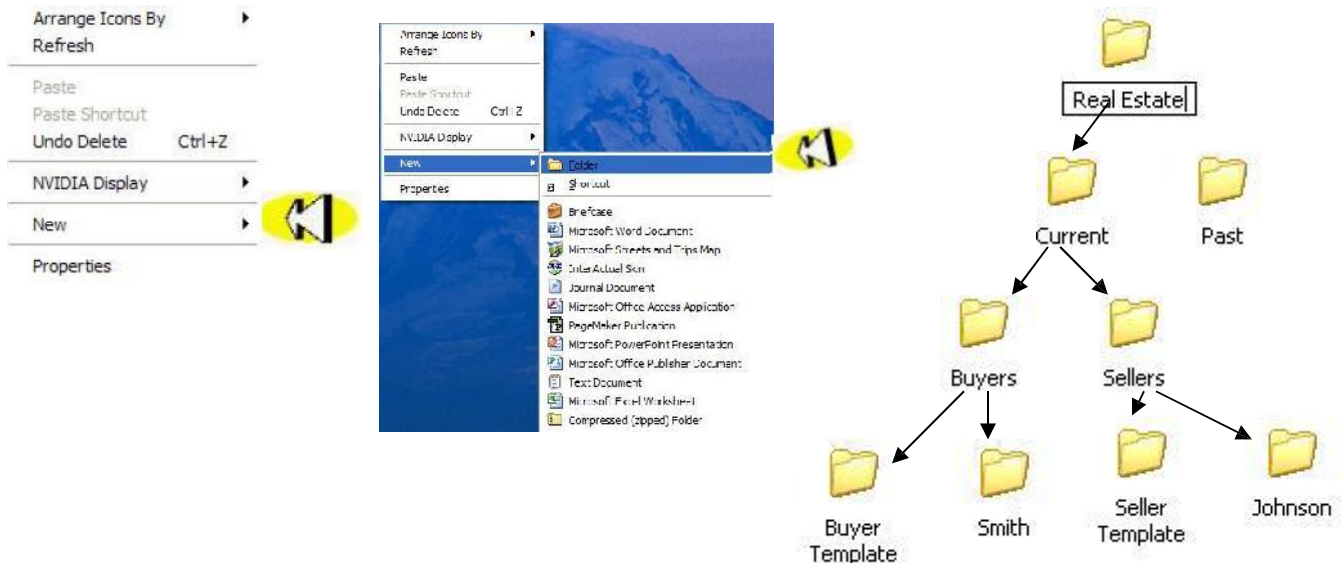
A. SETTING UP YOUR COMPUTER AS AN OFFICE

Concept & Goal:

You should be utilizing your computer as you would your office, including where you put your paperwork, folders, files, faxes and all other documents.

To do this-

1. Right click on empty space of your desk top, click on *New*, then *Folder*, then rename this folder Real Estate. This will be the basis of your whole system.



2. Double click to open this up, and create two folders inside your Real Estate filing cabinet- *Current* & *Past*. Under your *Current* filing cabinet, create a new folder, labeling this *Buyers* & another one, *Sellers*. Open each of these folders and create a folder labeled *Buyer Template* and *Seller Template*, respectively.

3. Drag and drop the specific documents into the *Buyer Template* and *Seller Template* folders that you would use for any generic client. Be sure not to type any specific clients names or addresses into these documents. Do not open these folders again unless you need to change a document.

4. You will now need to create the individual client folders using your *Template* folder, which will include all the documents inside. This will be achieved with the 3 right click system. Highlight the *Template* Folder, right click and click on *Copy*. Then go to any *blank* area of the screen, right click and click on *Paste*. Highlight the new folder, which will be labeled by default- *Copy of Buyer Template*. Right click and go down and click on *Rename*, which you will now type in the actual client's name.

Note: You can also push the Ctrl button and drag the folder at the same time to create a copy.

5. You will have the documents you need as they are there and previously filled out with generic information, and you will add other documents specific to that client, as they come in.

6. When you are finished with a client, you can drag and drop into the *Past* folder.

Note: You can open up two “windows” and drop and drag from one window to the other. Resizing the “window(s)” will be key here. You can change the size of the “window” by clicking the middle button in the top right corner of the screen. While scrolling over the corner or side of the screen, the cursor will change to an arrow. While holding the left mouse button, resize the screen. Point your cursor in the top blue area to move the “window.”

B. Receiving & Sending Faxes Online


Concept & Goal:

You will want to eliminate your “traditional” fax machine and start receiving and sending all faxes through your email. This will eliminate a “hard” line that plugs into the wall for dial up, as this is used through the internet.

Pros: -No more expensive ink or rollers to purchase -Only print the faxes that you want to print -No more jammed faxes -No more spending time to send faxes one person at a time
-Have faxes sent to you at anytime to a dedicated line, that you can receive anywhere you have your computer

To do this-

Go to an online fax service. I personally recommend www.metrofax.com.

This will put a  button in your Outlook® toolbar.



When you want to fax a document, simply click on this button, put in the fax #, name of person and company.

Click OK, and this will be converted into a “regular” email address. You can then attach a file or simply type just like you would an email, as that is what will be faxed. You can also add other “regular” email addresses or other fax numbers, and it will be emailed to those with email addresses and faxed to those fax numbers—ALL AT ONCE!

You will receive a confirmation email that your fax was properly sent. Save



this and the CC copy to yourself in your client's folder.

To receive a fax, simply give out your fax number. (you do not need to mention e-fax or an online fax- THIS IS YOUR ONLY FAX) I recommend a 1-800 toll free number so clients can easily send you faxes from wherever they are. You receive faxes just like you do an email. They will come in a PDF format, so they are easy to forward and to file. You will be able to send and receive a fax from anywhere you may be in the world.

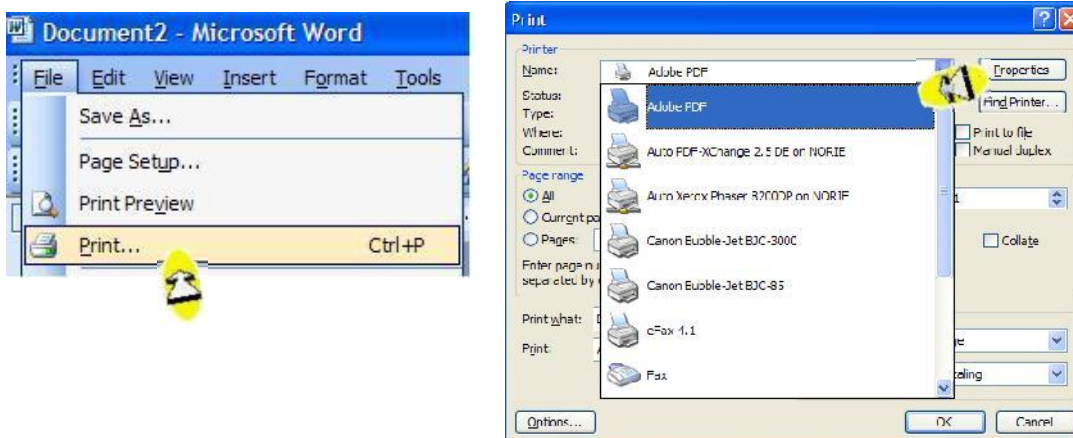
C. WRITING DOCUMENTS USING A PDF PROGRAM

Concept & Goal:

A PDF (Portable Document Format) **writer** program is a method of printing ANYTHING on your computer screen into a PDF **reader** file format. You will want to send to people documents with ease without them being able to change it. Everybody has or can download a PDF version of **reader** for free, allowing them to view the document. The **writer** version of the program usually costs money.

To do this-

Choose the PDF writer program from your drop down menu of printers, or sometimes a button will be included in the toolbar. Save the PDF file into the appropriate folder.



Some different PDF writer programs include:

www.primopdf.com; www.cutepdf.com ; www.adobe.com ; www.nitropdf.com

Note: Adobe is the most widely used PDF reader and writer program currently on the market. Though the reader version is free, the writer is about a \$400 program. NitroPDF is an alternative program of Adobe, but costs about \$140 and does MUCH more than Adobe, including being able to convert a PDF document into Microsoft Word. Adobe also has a glitch with tablet computers and typable PDF documents, whereas Nitro works fine.

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The programs that cost will allow you to:

- 1) Extract documents- Example: You will need this when you receive a fax with numerous pages that include the LBPB, SPDS, addendums and the purchase offer. You will want to Extract the LBPB from the rest of the fax, where you can label it and put in the client's folder.
- 2) Eliminate documents- Example: You will need this when you receive a purchase offer with a cover page, copy of the MLS listing, copy of the check, etc. and you want to Eliminate these pages so you can send JUST the purchase offer to your client.
- 3) Insert documents- Example: You will need this when you receive a fax where one page is missing from the purchase offer. When you receive another fax with that one missing page, you will need to Insert this into your other fax.
- 4) Switch pages around- Example: You will need this when page 7 of the purchase offer is sent at the end of the fax instead of in the proper order. You can now switch the pages around to put it in the correct sequence.

Once you have a PDF formatted file, you can then email or fax it with ease, not to mention ease of filing.

Note: Zipform® has a limited version of PDF writer, allowing you to create a PDF reader document. This is available in the Online or Desktop version.

D. SIGNING DOCUMENTS ON YOUR SCREEN

Concept & Goal:

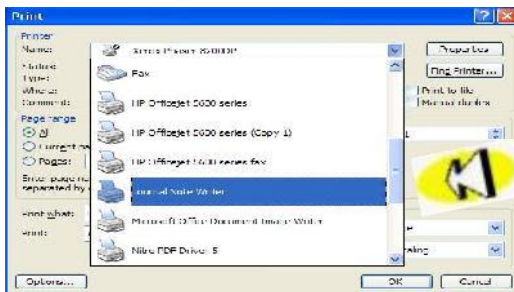
Having a Tablet Computer will allow you to take ANYTHING on you screen and convert into a format that will allow you to write on it.

To do this-

A Tablet Computer will be necessary.

1. Signing On Your Screen

Whatever is on your screen, you can convert into a format that will allow you to write on your screen. Just like writing into a PDF, but instead of printing with a PDF file writer, print into a program that ONLY comes with tablet computers- *Journal Note Writer*. This basically photo copies your screen and puts it in the background, allowing you to write over it. Afterwards, ALWAYS convert into PDF file format before sending out.



The Magic Pen will allow you to change a non-touch screen computer into a touch screen. Placing this \$120 device on the top of the computer with the stylus and the right software will allow you to get sigs from your clients

MICROSOFT OFFICE- EXCEL & WORD

1. EXCEL-

Concept & Goal:

Use Microsoft Excel for calculations and to auto-populate other cells.

To do this-

The equal (=) button tells Excel that you will either have a calculation that you want it to computer, or that you want to populate the cell from another cell.

#: 3.000%
TOTAL: =K54-B0
COMM: \$16,155.00

	CONTRACT C
	Note: This is a file requirement AL
ADDRESS OF PROPERTY SOLD: =A100'B88	
ELLER: Michael/Sandra Meyer	PHONE#

2. WORD- 50 minutes

Concept & Goal:

There are MANY different forms this can be used for, including free templates that can be downloaded.

Some function to help save time-

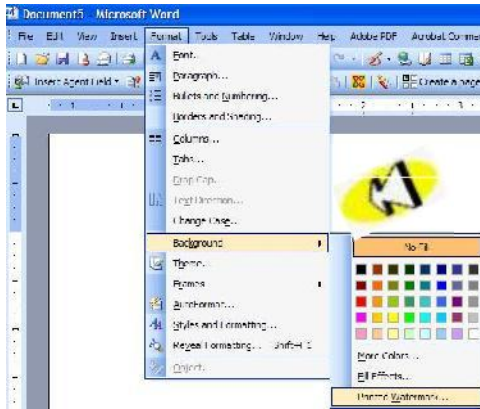
The equal (=) button tells Excel that you will either have a calculation that you want it to computer, or that you want to populate the cell from another cell.

- Auto Correct Features-** Type an abbreviation of the full word you want to type. Click on *Tools*, then *AutoCorrect Options*. Put in the initials in the replace field and the full word you want it to spell out in the With field. Click *Add & OK*. When you type those abbreviations the full word will then pop up.



Note: Though these are the steps for the 2003 version, this can be accomplished in 2007.

b. Creating A Water Mark- This will allow you to take a picture or verbiage and create a watermark or background, where words can they be printed on top. Click *Format, Background, Printed Watermark*. Then click on *Picture Watermark*, choose your picture from the file and click *OK*.



CLEANING UP & MORE GOODIES

Cleaning up by:

Start, All Programs, Accessories, System Tools, Disk Clean Up (again except Disk Defragmenter)

Backing Up Your Computer (AN ABSOLUTE MUST)

This can be accomplished with an external hard drive and/or an online service. Since one of my two blanket statements is to have everything on your computer (in your office), I keep it on an external hard drive, which can be purchased inexpensively online or at an electronics store. Get something that is at least double the size your computer's hard drive. An external hard drive will come with its own software to backup your computer, or there are third party software providers as well that sell this type of software.



Do this religiously and without fail (just like cleaning your computer), as this will save you from tons of headache when your computer crashes (and it will sooner or later).

Anti-Virus & Internet Security

You will want a good security system to guard your computer against viruses, worms and trojans, which can destroy parts or all of your computer. Some of the more popular programs are Norton and McAfee, yet they are known to create problems for other software programs on your computer. AVG is a great program that I recommend and use.

Gadgets

There are many "toys" and accessories to help you in the field. Here are the most important ones.

- 1) Digital Camera- This will allow you to take your own MLS pictures, magazine, newspaper and fliers photos. Since you can erase any bad pictures and it costs nothing to develop, take lots of pictures of the inside and outside of the house. You'll be surprised how much you will remember about the house after looking at the photos when you're in your office.



- 2) Portable Printer- This will allow you to print out and scan in documents while you're out in the field, without having to go back to the office. Very light weight and fairly quick, this is invaluable-especially if you don't have a tablet computer.



- 3) Palm Pilot/Smart Phone- Having one of these devices will allow you to keep all of your contacts, calendar and pdf files of all your transaction on hand at all times.
- 4) Travel Drive-This handy information stick will allow you



to transfer information. Very inexpensive,



quick and easy from one computer to another. though can only hold a limited amount of data.

Conclusion

Because technologies are changing all the time, there is no way to know about every new program or gadget out there. Don't try to remember everything overnight as you will just frustrate yourself. Inch by inch, everything is a cinch is the key here. Practice and learning a piece of this day by day will lead to perfecting the system.

I have given you the basics that you will need in your real estate career to make your life much easier and allow you to conduct your career smoother. You can't break your machine by experimenting, so play and have fun while learning. There will always be little glitches in your computer. Don't get frustrated (though sometimes this can be very hard to do). Sometimes closing the application and re-opening it or if needed turning off the machine can solve a problem. A great way to get immediate help on anything on or in your computer is www.mycomputerworks.com. They charge a minimal monthly fee and you get all the help you want as they will "take over" your computer and you can watch them solve a problem or simply show you how to do something on your computer. Cleaning the computer regularly will also help the computer run quicker and smoother. And I can't stress enough to back up your computer!!!

Did you know...

- You can toggle between screens by holding down the Alt + Tab keys.
- You can copy and paste from just about any program to any other program. Ctrl C & Ctrl V are universal short cuts that work to and from just about any program.
- You can take a picture off the internet by right clicking on the picture and click *Save Picture As ...*, whereas at that point you can put into the folder of your choice. *(be aware of copyrighted materials)*
- You can use many short cuts to eliminate using the mouse and use more keyboard functions.