

New Listing (Entry into Agent Office (OLA)):

- Look up contact (check to see if entered previously)
 - Enter (if new) <Add Contact>
 - <OK>
 - Desktop – double-click (Click on name)
 - Change “Status” to Active Listing
 - Double Click “Status”
 - Select “Active” from list
 - OK
 - Mark categories as appropriate Ex. Seller Client
 - Enter family info if available
 - Double Click on “Source” and select from list (refer to Pink Sheet)
 - Go to “Notes/Activities” tab, click on it
 - Select “Add a New Note”
 - Type: “Our Sign/Our Post”
 - Go to “For Sale”
 - Edit
 - New
 - Residential
 - OK
 - Fill in address
 - Listing
 - Single Family
 - Change Status to “Active”
 - Enter: List Price, Original List Date, Expiration Date
 - Select “Exclusive Right to Sell”
 - OK
 - Owners: pull up correct owner name from list (click on “owners” select from list)
 - Agent: select Frank Russo (click on “agent” select from list)
 - Select: Save
 - Select Plans
 - Select New Listing
 - Launch Plan
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- Go through to do list and mark as done
 - Click on “To Do”
 - Select: Yes
 - If letter, then select Print. Select “Neither” for envelopes or labels.
 - Select: Yes
 - From the Desktop – make sure Client is selected
 - Contact Summary Report (for Frank)
 - Reports
 - Contact Summary
 - Deselect activities, notes, plans
 - Print
 - 3-hole punch and put in Frank’s box
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- If clients have younger children – prepare Clean Kids Packet (make calendar, include sheets of stars)
 - Page Frank and Buyer’s Specialists

▪ (Steve/Heather) – AirTouch (Darlene) – PageNet (Frank)–
Cellular One

- Open Internet Explorer
 - Go to Favorites
 - Select: “AirTouch Text Messaging” – Pager
 - Enter: 6022278364
 - Message to include: “New Listing: address (hundred block), price, bed/bath, O/name, phone.”
(If not occupied then V = vacant.)
 - Highlight message and press CNTRL+C (this will copy the message)
 - Send
 - Select: “Back”
 - Select: Text messaging for Cell Phone
 - Enter: 6025681200
 - Message: CNTRL+V (this will paste message)
 - Enter: e-mail address for verification
 - Send
 - Go to Favorites
 - Select: “Send a Message - Darlene”
 - Select: AZ-Phoenix (as the messaging terminal)
 - Message Address: 0001424
 - Click in Message area and press CTRL+V (this will paste the message otherwise retype same
info as above)
 - Send
 - Go to Favorites
 - Select: “CellularOne Text Messaging - Frank”
 - To: 6027392727
 - From: your name
 - Subject: Brief description (New Listing, New Escrow, etc.)
 - Click in Message area and press CTRL+V
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- Continue marking as done tasks completed in Agent 2000

 - Go to Excel – (Current Year) Listing file; add information to file
 - Double click on Excel
 - Go to File and click on correct file (i.e. 01Listing)
 - Print this report after approximately 3 additions
 - 3-hole punch and put in Frank’s box
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- Active Listing (for Frank)
 - Go to Contact Card
 - Select: Tools
 - Select: Group
 - Select: Saved group
 - Select: Active listings
 - begin query
 - reports
 - telephone list
 - Select “Full Phone/Address List”
 - Select: Group

- print
- Staple and 3-hole punch and put in Frank's box

- Call client and introduce yourself. Include the following in the conversation:
 - home now in Multiple Listing Service
 - feedback on their home
 - sending packet that includes copies of forms client signed, temporary or photo brochures and faxback sheets (faxback sheets are used by Realtors)
 - encourage client to call with questions
 - if Virtual Tour, let client know is has been requested
 - remind client call feedback line (623-362-3134) when Realtors show house

- Make label for File
 - Open WordPerfect
 - Go to Format
 - Select Labels
 - Choose Laser
 - Scroll to 5162
 - <Return>
 - Refer to blank sheet of labels to start typing in correct location.
 - File Label: Street Address (20 pt Bold Type)
 - o City, State and Zip (18 pt Type)
 - o First and Last Name (18 pt Type)
 - Labels are manual feed through laser printer.
 - Press On-Line button on printer when orange light flashes.

- Make label for envelope
 - Go to Contact Card (Agent 2000)
 - Select: Write
 - Select: Label
 - OK
 - Type in correct row and column (referring to blank sheet of labels)
 - Select: Manual Feed
 - Select: Print
 - Place on manual feed tray and push on-line button

- Uploading Photo to MLS
 - Open Outlook Express
 - Click on "New Mail"
 - Click on "To"
 - Scroll down and select Photo MLS
 - Double Click
 - In the Subject area type: "MAIN PHOTO FOR MLS LISTING"
 - The message should read as follows:
 - Please find attached the main photo for listing #_____. The file format is ".jpg". Agent ID: FR006; Office ID: RMXI02.

- Thank you,
- Click on "Insert"
- Select: "Signature"
- Click on "Attach" (this is the paperclip symbol)

- In the window that comes up, go to the My Documents. Double click Stacey. Double click Pictures. Double click Actives. Proceed to open the appropriate address. Then double click on one of the outside pictures of home (usually has been saved as #1).
 - Click on "Send"
 - Wait until the message is fully sent before closing out of Outlook Express. You can tell this by the lower right-hand corner. It will change to "No new messages".
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- Faxback Sheets
 - Look up client (if necessary)
 - Go to "For Sale"
 - Click on "Promotions"
 - Choose "Fax Back One"
 - Double-click on box for image; select photo (if available) otherwise use balloon. (This will be an image of the outside front of property.)
 - Choose <Select>
 - Print 5 copies on Color Printer
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- Brochures
 - Go to Promotions
 - Choose "Just Listed One" or if have photos then "Just Listed Three"
 - Double-click on box for image
 - If no photos then select the balloon image.
 - If photos then the largest image is of the front of property; the other two images are one from inside then one from back of property. (Select images that you feel best show off the property.)
 - Choose <Select> (Again this step will be repeated for photo brochures.)
 - Go to <Description>
 - In "Itemized Features" type information from MLS description
 - Print 1 copy for proofing (use this as sample in file)
 - Print to Color Printer
 - Print 13 copies (1 copy - 3-hole punched for Steve; 1 copy - 3-hole punched for Darlene; 1 copy - 3-hole punched for Heather; the remainder to be sent in packet to client)
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- Lot Size and Deed
 - Fax Capital Title – 623-566-9191; address fax to receptionist (currently Yancy or Michellie)
 - Under Comments: "Please fax the lot size(s) and current title information for the following parcel number(s): list parcel number(s) and street address(es). Thank you
 - Circle our fax number
 - Once this information is received back from Capital Title compare the deed with the name(s) and signature(s) in the listing file. If there are any discrepancies, speak with Frank about it right away.
 - Enter the lot size information in MLS.
 - Open PC Access
 - Select: 12 (Add or Revise)
 - <Return>
 - Select: Change
 - <Return>
 - Enter: MLS #
 - <Return>
 - Mode: UPDL (Update listing)
 - <Return>
 - Type: LS
 - Enter the lot size dimension, i.e. 60x100 (or IRR if irregular)
 - <Return>
 - Type: LTSZ

- Select appropriate lot size letter (A. 1-7,500; B. 7,501-10,000; etc.) F1 will bring up the help window and allow you to scroll to appropriate size.
- <Return>
- F6 (Save)
- Y (This will print a copy of the changes.)
- <Return>
- Make 5 copies (Front desk; Frank; Darlene; Steve; Heather; original to file). Be sure to highlight change

- Homebook
 - Double click E-Neighborhood icon
 - Select: Find-Go To
 - Select: By Street Address
 - Select: Zip Code
 - Enter Zip Code (make sure correct city is pulled up)
 - Enter Street Name – choose correct street with direction from auto list
 - Enter House Number
 - <Return>
 - Select: Neighborhood Snapshot
 - Click cursor next to large X on screen
 - Select: Print
 - Go to cover page
 - Select: Clear Image
 - Click on image area
 - Select photo (click on folder with up arrow; then select appropriate address folder; double click appropriate photo – generally this is labeled 1)
 - Select: Print Preview
 - Load one sheet of fancy paper into the color printer paper tray
 - Select: Print
 - Print page 1
 - Select: Print
 - Print pages 2-____
 - Once printing is complete insert at the back of book a copy of the SPDS (if available); otherwise just get another sheet of fancy paper for back cover.
 - Spiral Bind
 - Attach sticky note to front of book with this note: “Please leave out for Realtors and their clients. Thank you.”
 - The Homebook is now ready to be added to the material being sent to the client.

- Introductory Letter
 - This letter is several pages long so be sure to print page 1 only from the upper tray; then print pages 2-4 from automatically select.

- Usually done by Office Manager who will review file, paperwork and green sheet prior to handing over to Closing Coordinator.

MLS Change to Under Contract: *(Our Listings Only)*

- PC Access for Windows
- Select: 12
- Select: Change
- Enter: MLS #
- Mode: UCB
- CD (Contract Date)
- COE (Close of Escrow)
- SP (Selling Price)
- SA (Sales Agent - refer to contract ex. CP051)
- LNTP (Loan Type) (refer to contract)
- LYRS (Years) (refer to contract)
- PYTP (Payment Type) (refer to contract)
- CCS (Closing Cost Split) (refer to contract)
- PBB (Points Paid By Buyer) (refer to contract – usually 1 if used)
- PBS (0) (refer to contract)
- <F6> (to save)
- Y
- <Return>
- <F8> (to exit)
- Make Copy for Front Desk, Mark with “FYI – Under Contract”, Place in Grey Basket

New Listing Distribution:

- Separate NCR copies (MLS Profile Sheet, Real Estate Agency, SPDS)
 - Top copy is for our file
 - 2nd copy to Client
 - In the case of Real Estate Agency, the 3rd copy is for Jerri

- Copies: Make 1 copy of the following
 - MLS Profile Sheet
 - Cost Estimate Summary Sheet (if completed)
 - SPDS (for Homebook)
 - Lead-Based Paint (if applicable – property built prior to 1978)

- Copies: Make 2 copies of the following
 - Buyer/Seller Purchase Contract Addendum
 - Exclusive Right to Sell/Rent
 - Fair Housing Disclosure

- Originals: Attach to left side of file
 - MLS Plano
 - Pink Sheet
 - Tax Record
 - Exclusive Right to Sell/Rent
 - Buyer/Seller Purchase Contract Addendum
 - Cost Estimate Summary Sheet (if completed)
 - MLS Profile Sheet
 - Fair Housing Disclosure
 - Real Estate Agency
 - Comps and other supporting information taken out on listing
 - Listing Checklist

- SPDS and Lead-Based Paint (if applicable) should be paper clipped and left loose in file for easy reference and signing once property is under contract*

- Copy to Client. (Use Russo Team folders; staple team members business cards inside; hole punch right side to attach all signed documents; temp brochures/faxback sheets will go on the left side. If photo brochures/faxback sheets then be sure to include Homebook behind brochures/faxback sheets.)
 - Documents to include:
 - Cover letter
 - MLS Plano
 - Exclusive Right to Sell/Rent
 - Buyer/Seller Purchase Contract Addendum
 - Cost Estimate Summary Sheet (if completed)
 - MLS Profile Sheet
 - SPDS (if completed)
 - Lead-Based Paint (if applicable)
 - Fair Housing Disclosure
 - Real Estate Agency

- Copy to Jerri. Be sure to fill out one of Jerri's new listing forms and staple to top of paperwork; deliver to grey box at front desk.
 - Paperwork is as follows:
 - MLS Plano

- Exclusive Right to Sell/Rent
- Buyer/Seller Purchase Contract Addendum
- MLS Profile Sheet
- Fair Housing Disclosure
- Real Estate Agency

Saving Photos for Listings:

- Field Tech will deliver disk with approximately 12-14 pictures.
- Insert disk.
- Open: Adobe Photoshop LE (eye at lower left of screen)
- Select: Get Photos
- Select: "A" (Floppy drive)
- Click Ok.
- Double click each photo.
- Select: New Folder (this is *prior* to continuing with save).
 - Right click on Start button
 - Select: Explore
 - Select: My Documents (shared, so folder with hand)
 - Double click on Stacey
 - Double click on Pictures
 - Double click on Actives
 - Select: File
 - Select: New Folder
 - Name folder by the listing address.
 - <Return>
- Double click on this newly created folder.
- Close out of Explorer window
- Click on window to reactivate Photoshop
- Make sure photo is selected.
- Review photos, if look good then choose "Save As" from the File Menu.
- Select: "C"
- Double click on "C"
- Double click on "Documents and Settings"
- Double click on "stacey.STACEY.000"
- Double click on "My Documents"
- Double click on "Stacey"
- Double click on "Pictures"
- Double click on "Active"
- Double click on appropriate address folder
- Name file: ex. 20808 N 42nd Dr 1 (.jpg will be added after hitting <Return> twice)
- <Return>
- <Return>
- Select another photo. I usually select 2 of the front, 2-3 of the inside, and 2 of the back. Use discretion. Some homes warrant more or less being saved.
- Reselect correct folder if necessary.
- Repeat above steps until all photos are saved.
- Exit program.

Load Photos into Agent 2000:

- Open Agent 2000.
- <Control> + L
- Enter Client's last name.
- <Return>
- Select: For Sale
- Select: Photo Manager
- If balloon image still there, select delete then "Yes".
- Click on "Import".
- Click on the Folder with Up Arrow
- Select Folder with appropriate address
- Change file type to ".jpg".
- Click on picture
- Select: Save
- For additional pictures
- Select: Import
- Change file type to ".jpg"
- Click on picture
- Select: Save (Continue until all pictures have been saved.)
- Make Faxback Sheets and Brochures as per instructions in New Listing.

Virtual Tour

- If a property is to have a Virtual Tour make sure that file is in front of you
- Call IPEX, 1-888-722-6266
- Listen to options – select the option to “Order Virtual Tour”
- Customer service rep will ask for your name. Respond “The Agent’s name is Frank Russo”. Then give your name.
- Frank does have a “package”.
- They will ask you to confirm the following: Frank’s e-mail as stacey@russoteam.com and our web master as stacey@russoteam.com.
- Give information they request (zip code, address - spell street name if necessary, MLS #)
- Information is to be posted to Realtor.com and to Re/Max.com

- The Videographer will call (usually within 24 hours) to set up date/time for Virtual Tour
- Write down Videographer’s name and phone number as well as tentative date/time
- Enter this information on the client’s Contact Card in Agent 2000
- Call client to confirm date/time is ok
- Find out if client will be home or if Field Tech will need to open property
 - If Field Tech is to open property, complete work request order and mark with purple X in upper right. Be sure to highlight the date/time of Virtual Tour. Then place in his box.
- If the date/time do not work for client, find out the day and rough time period they would prefer. Then call the Videographer back with that information. Call client back to confirm new date/time.

- Once Virtual Tour is received via e-mail, save the attachment as follows:
 - Go to the C drive
 - Open: Documents and Settings
 - Open: “stacey.STACEY.0000”
 - Open: My Documents
 - Open: Stacey
 - Open: Virtual Tours
 - Save
 - Insert a floppy disk
 - Double-click “My Computer”
 - Double-click the A drive
 - Move window to the left of screen
 - Double-click “My Documents”
 - Double-click “My Documents”
 - Double-click “Stacey”
 - Double-click “Virtual Tours”
 - Make sure that you can see the A drive window to the left
 - Click and drag the appropriate tour plus 2 additional over to the A drive so file will copy
 - Make 5 disks (always use appropriate tour plus 2 additional – which can be random)
 - Include this disk with “Virtual Tour” letter
 - Enclose letter and disks in Russo Team folder for protection. Write on lower left corner of envelope: “Fragile: Magnetic Media Enclosed” (I also write this same information on the back of the envelope.
- Once these are completed make sure you mark as done in Agent 2000

