Section 8: Systems

Dotloop | Matrix | Intranet | PropertyBase

Connect & Integrate Applications

GROW YOUR PROPERTYBASE IN AN ORGANIZE MANNER

1. Who –Begin with the people you know and who know you—Mets, or Sphere of Influence. This includes family, friends, neighbors, former coworkers, schoolmates, teammates, etc. This group is your source of new business, repeat business, and referrals.

2. Add Haven't Mets—people who don't know you ... yet! You will connect with them to ask about helping with their real estate needs. This group is a source of new business, and you'll learn more about how to find these later in the course.

3. Add Referrals—Remember, you'll be asking everyone from your Mets group for a name, or several names, of people they know who may be thinking of buying or selling in the near future. Referrals may be hot leads and are golden!

Goals for Contact

1. Ask for their business

2. Ask for referrals

3. Provide value and gather more information to build and nurture the relationship

Keep in mind why you want their information—to build the relationship. You'll want as much data as you can gather for each person.

- Name
- Address
- Email
- Phone numbers
- Social media
- Children
- Pets
- Own/Rent
- Length of time in their current home

In fact, not having all the information is a great reason to make another call and ask.

Feed Your Database

You now understand the significance of feeding your database. Start every day with a “Database Growth Exercise”.

1. Add at least 10 contacts to your PropertyBase CRM Database.

2. Include as much information as you can for each contact. If you don’t have all means of contact—for example, the records below have some “holes” of missing data—get it! Remember, this always makes for a great opportunity to reach out and ask for the missing information.

2. Classify / Use TAGS

After speaking with a contact and inquiring about their requirements, the next step is to categorize them in your database (by using TAGS) based on their needs.

Are they a buyer, a seller, or both? Are they a member of a particular group you’re targeting—a neighborhood, a religious group, or a sports team? Organizing your database will enable you to better service your customers and find new business.

For Example:

• Classify your contacts using “Types”. For example, types are Buyer, Seller, Buyer/ Seller, Agent, Renter, Investor, Vendor, etc.

• Classify your contacts using Groups or Create groups according to what makes sense for you. Examples could be Business Relationships, School, Sports, Open House Contacts, etc. Groups will also help with targeted marketing. Knowing what group the contact is in will help determine which marketing campaign will best resonate with them.

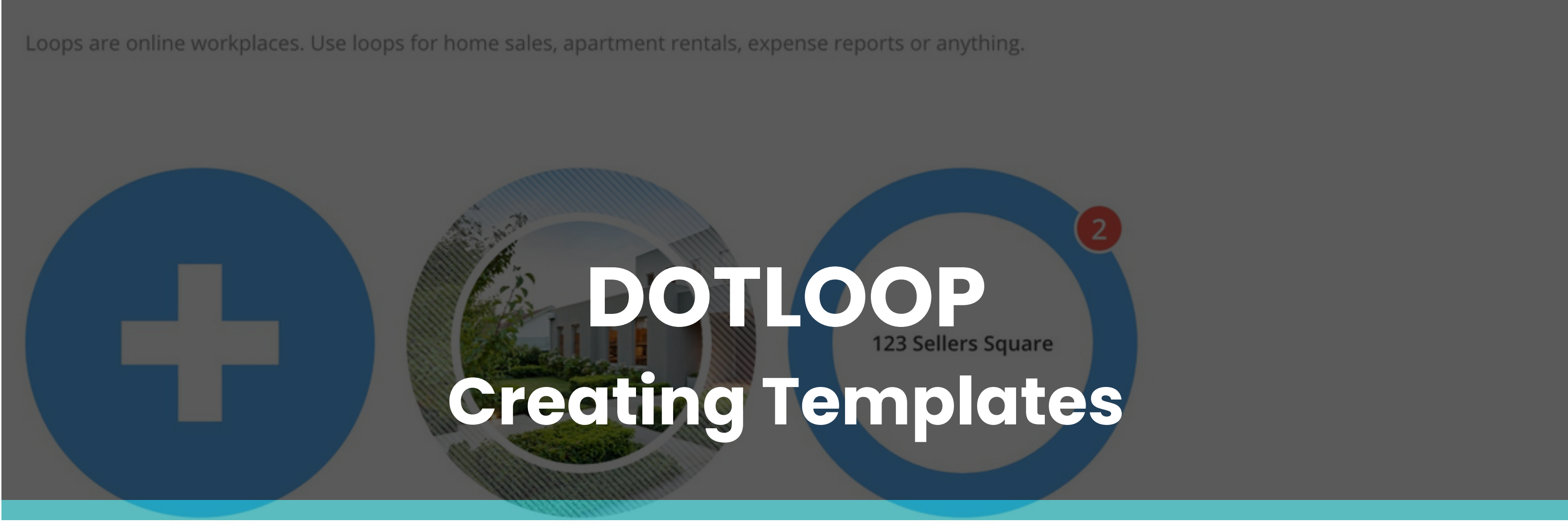
3. Campaign

It's time to start categorizing and qualifying your contacts in your Database Spreadsheet. It is simple to include them in a targeted marketing campaign.

1. Getting started with contacts

Your database is your business. It is important to build daily habits and to be very purposeful with how you communicate to both leads and contacts. Leads are people you have minimal contact information for. Communication is one-way, offer-based, and focused on identifying their motivation. Contacts are people you have implied or explicit permission to have an ongoing connection with. It's focused on getting a response and beginning a relationship. PropertyBase CRM enables you to organize and keep track of
all your contacts and leads, with the most customization and flexibility possible. We then sync all of these contacts and leads across all our databases, to make everything seamless.

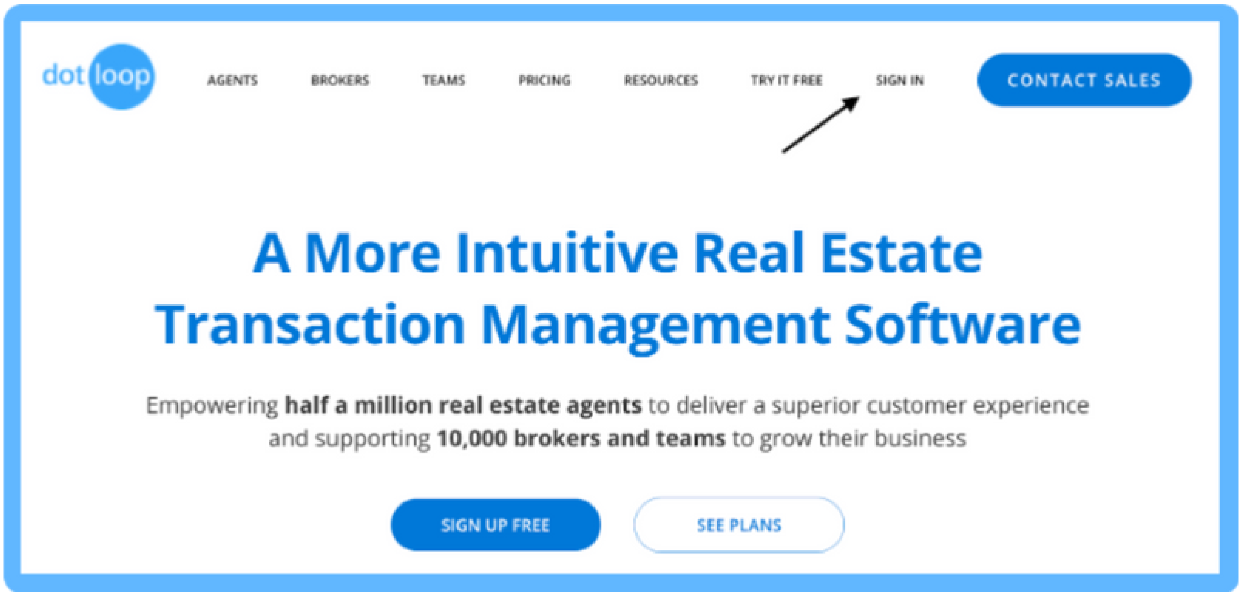
To learn how to access and get a rundown of the contacts app, follow the steps below.



DOTLOOP
Creating Templates

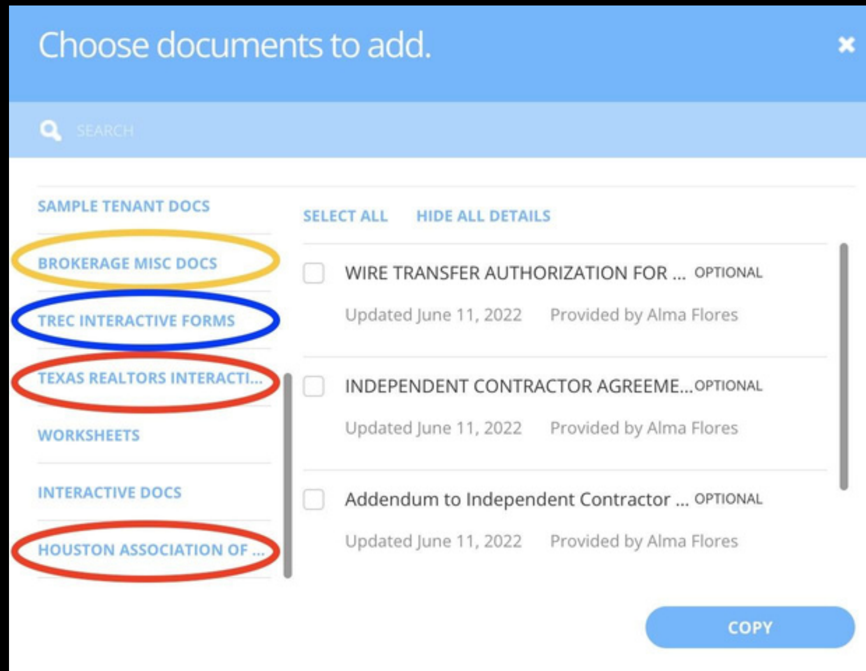
Managing Dotloop Contacts

1. Log in to Dotloop



HOUSE MATCHMAKER

Finding Docs on Dotloop



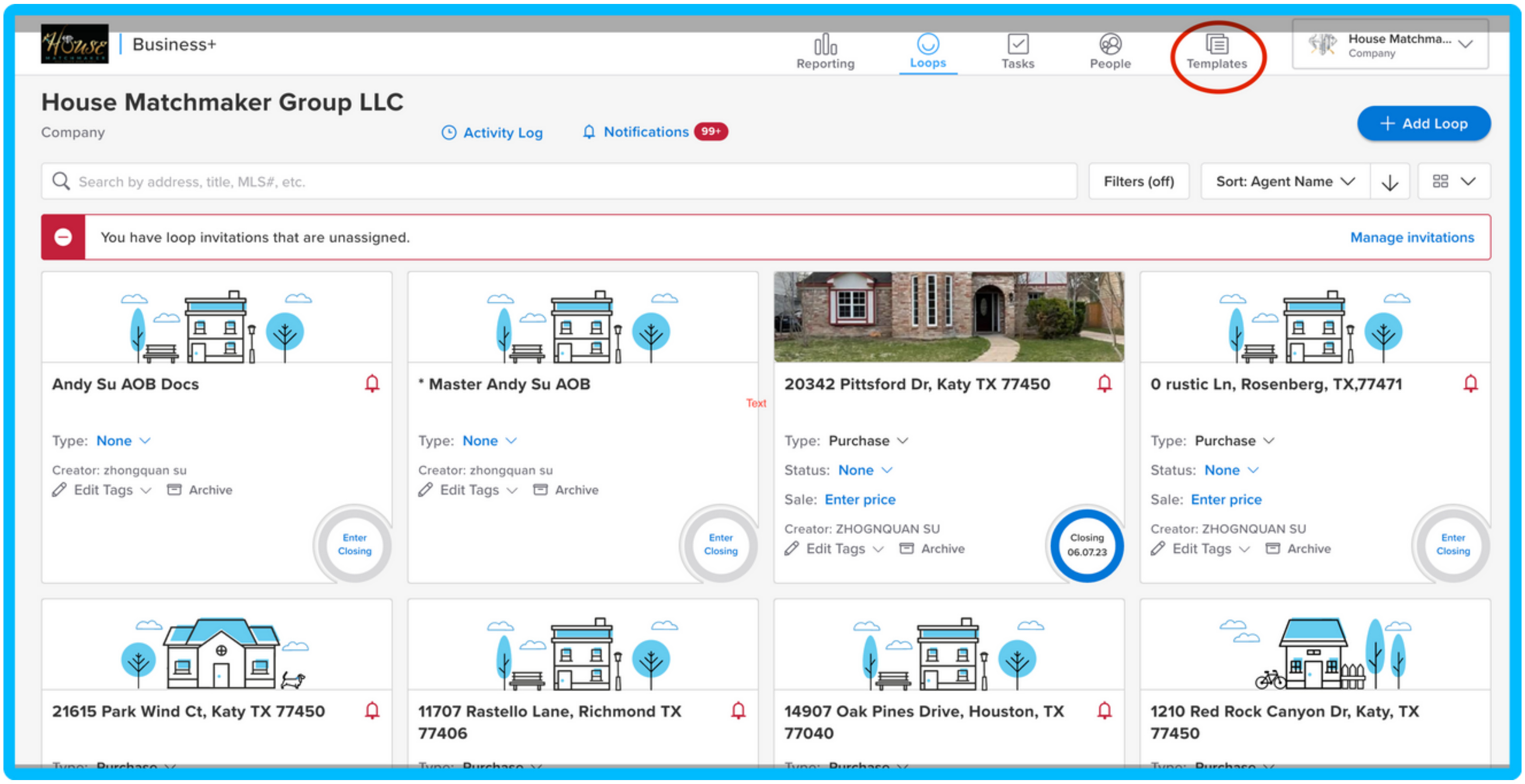
	REQUIRED BUYER DOCUMENTS
TAR	☐ Residential Buyer/Tenant Representation Agreement (TAR 1501)
TAR	☐ Information About Brokerage Services (TAR 2501)
TAR	☐ General Information and Notice to Buyer (TAR 1506)
HAR.com	☐ Broker Notice to Buyer/Tenant (HAR 410)
TXR	☐ Wire Fraud Notice or TXR 2517
TAR	☐ Information About Property Insurance for a Buyer (TAR 2508)
	☐ HAREI-Hou.Assoc.of.RELE.Inspectors List (Insert Buyer(s) Signatures)
TAR	☐ For Your Protection: Get A Home Inspection (TAR 1928) (Insert Buyer(s) Signatures)

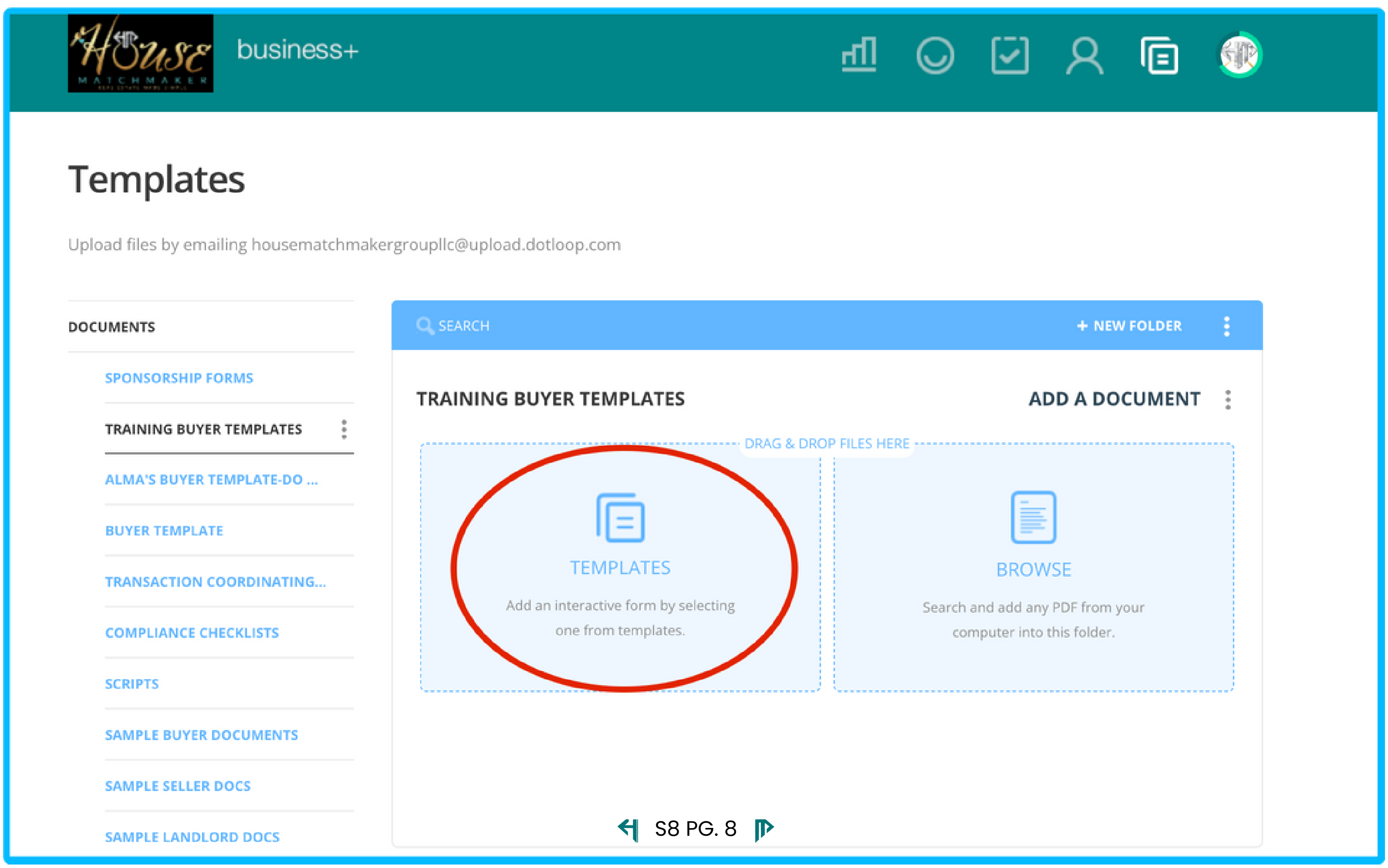
	REQUIRED UNDER CONTRACT
TXR	☐ Executed Contract (TXR 1601,1603,1604,1605,1607,1608,1609,1701 or Builder Contract)
TXR	☐ Third Party Financing Addendum Signed (TXR 1901) (Only for Buyers with Financing)
	☐ Buyer Pre-approval Letter for Financing / OR Proof of Funds for CASH BUYERS
TAR	☐ Inspector Information (TAR 2506)
TXR	☐ Seller's Disclosure Notice Signed (TXR 1406) *provided by Listing Agent*

TAR	☐ Information about Special Flood Hazards Areas (TAR 1414)
TXR	☐ Buyer's Walk Through & Acceptance Form (TXR 1925)
	☐ MLS Full Agent Report with OP, P, PSHO, or S Status with TAX RECORD
TAR	☐ Addendum for Property Subject to Mandatory Membership in a Property Owners Association (TAR 1922) (ONLY APPLICABLE IF PROPERTY HAS HOA)
TXR	☐ Addendum for Lead Based Paint Disclosure Signed (TXR 1906) (IF APPLICABLE)
TAR	☐ Lead-Based Paint Pamphlet (TAR 2511) Insert Buyer(s) Initial(s) & Signature(s) (IF APPLICABLE)

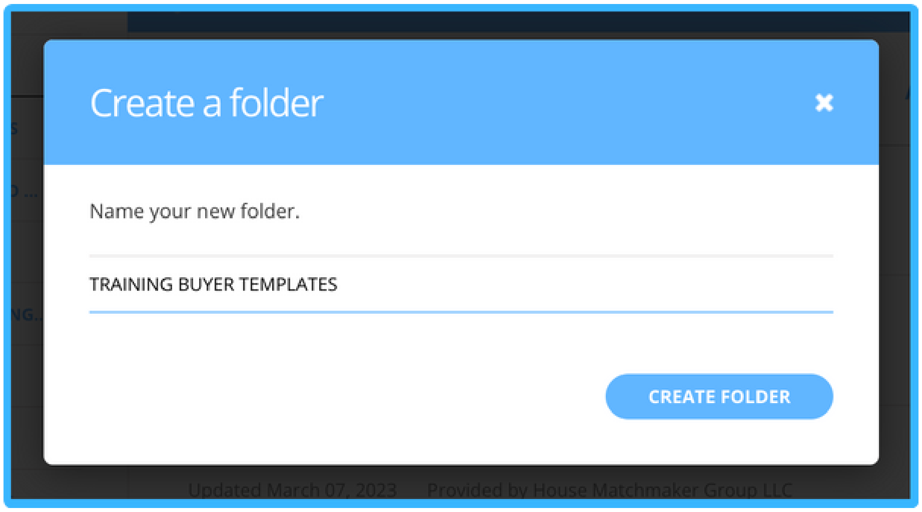
	*REQUIRED WHEN APPLICABLE BUYER COMPLIANCE DOCS
HAR.com	☐ Notice to a Purchaser of Real Property in a Water District (MUD/LID Disclosure HAR 400)
TXR	☐ Addendum for Lead Based Paint Disclosure Signed (TXR 1906)
	☐ Survey
TXR	☐ Notarized T-47 Residential Real Property Affidavit (TXR 1907)
TXR	☐ Intermediary Relationship Notice Signed (TXR 1409)
TXR	☐ Information about on-site sewer Facility Signed (TXR 1407)
TAR	☐ Signed Settlement Statement (Title Company)
TXR	☐ Communication Log
TAR	☐ Amendment to Contract (TAR 1903)
TAR	☐ Seller or Buyer Temporary Lease Signed (TXR 1910 or 1911)
TAR	☐ Addendum for Sale of Other Property by Buyer (TAR 1908)
TAR	☐ Non-Realty Items Addendum (TAR 1924)
	☐ Notice of Buyer's Termination of Contract (TAR 1902)
	☐ Release of Earnest Money (TAR 1904)

Open Templates: +New Folder



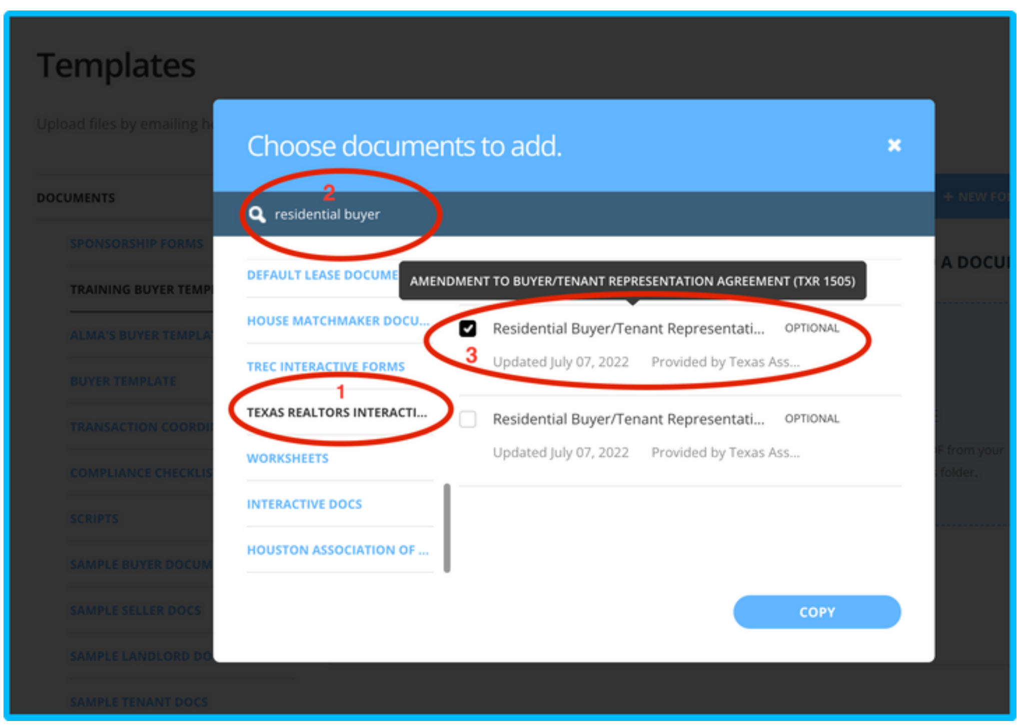


Create Folder: Buyer Templates



Search for each document on the checklist

Scan me to find your NRDS ID



Pre-fill each form

Residential Buyer/Tenant Representation Agreeme... FILE ADD SAVE

EMAIL - BUYING ... ASSIGNED TO NO ONE SERIF 11

TEXAS REALTORS

RESIDENTIAL BUYER/TENANT REPRESENTATION AGREEMENT

USE OF THIS FORM BY PERSONS WHO ARE NOT MEMBERS OF THE TEXAS ASSOCIATION OF REALTORS®, INC. IS NOT AUTHORIZED.

1. **PARTIES:** The parties to this agreement are:

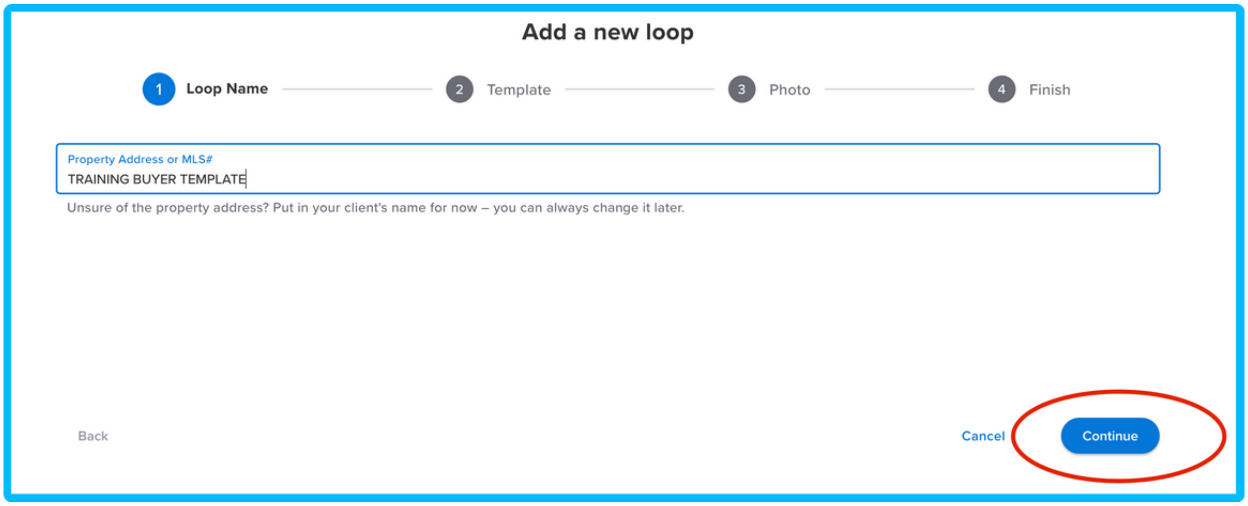
   Client: SARAH LEE
   Address: 123 MAIN ST
   City, State, Zip: HOUSTON, TX 77027
   Phone: 713-517-5806
   Email/Fax: SLEE@GMAIL.COM Email /Fax:

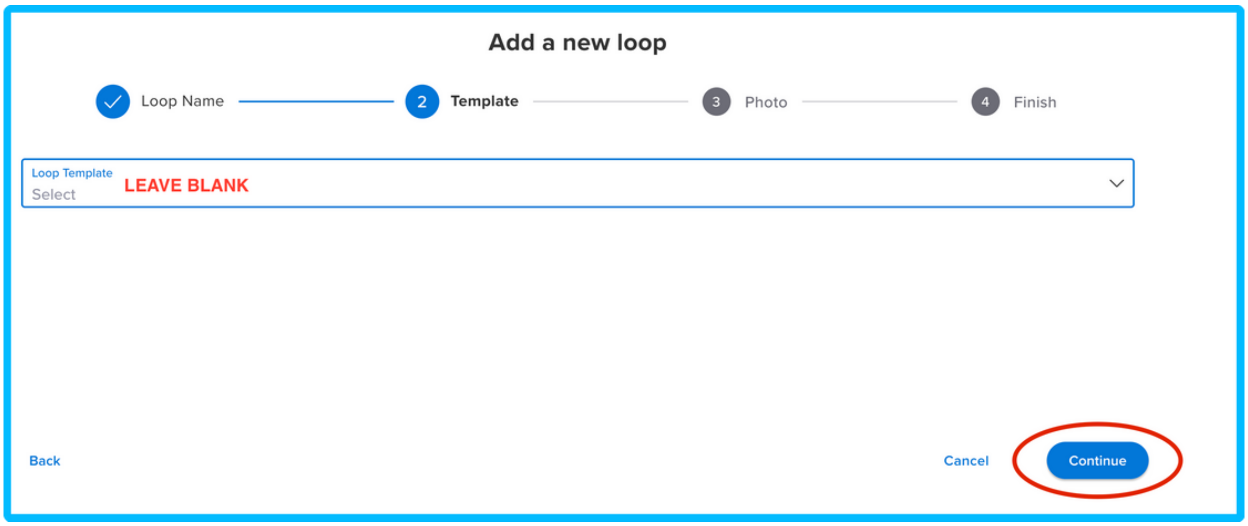
   Broker: HOUSE MATCHMAKER GROUP LLC
   ALMA FLORES
   Address: 1333 W LOOP SOUTH
   City, State, Zip: HOUSTON, TX 77027
   Phone: 713-517-5806
   Email/Fax: YOURHOUSEMATCHMAKER1@GMAIL.COM Email/Fax:

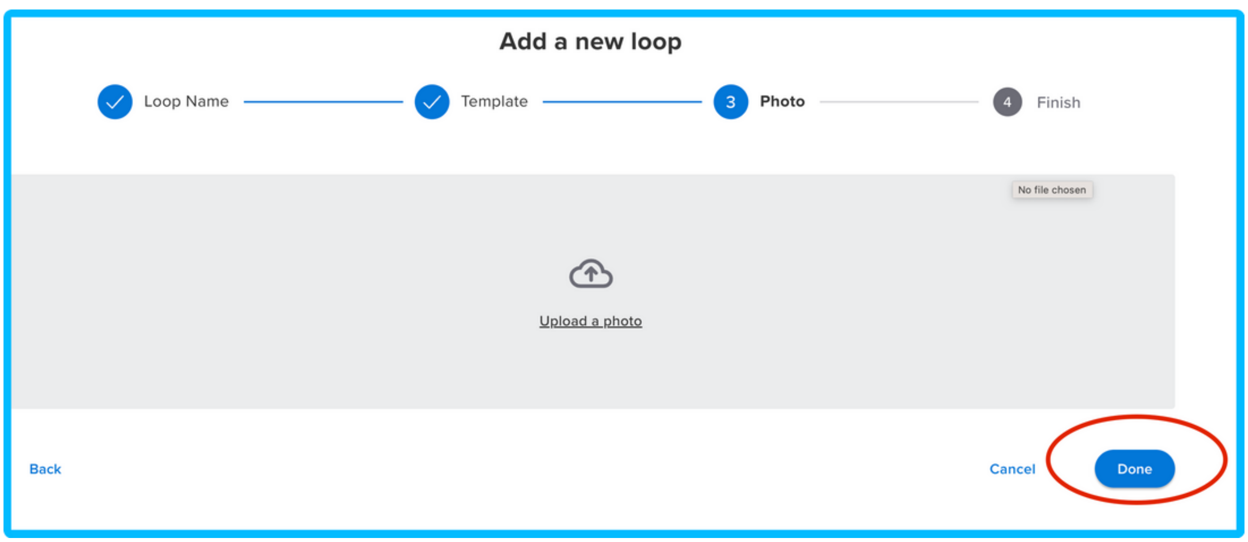
2. **APPOINTMENT:** Client grants to Broker the exclusive right to act as Client's real estate agent for the purpose of acquiring property in the market area.

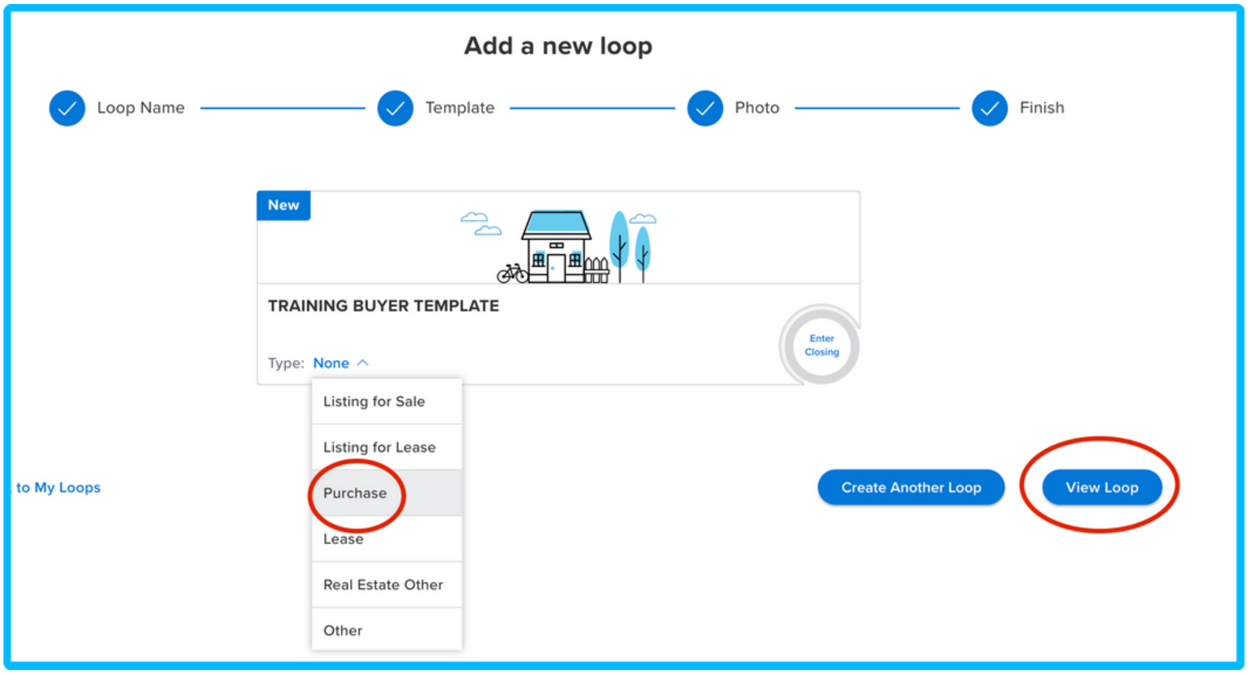
3. **DEFINITIONS:**
   A. *"Acquire"* means to purchase or lease.
   B. *"Closing"* in a sale transaction means the date legal title to a property is conveyed to a purchaser of property under a contract to buy. "Closing" in a lease transaction means the date a landlord and tenant enter into a binding lease of a property.

Create new Loop for client

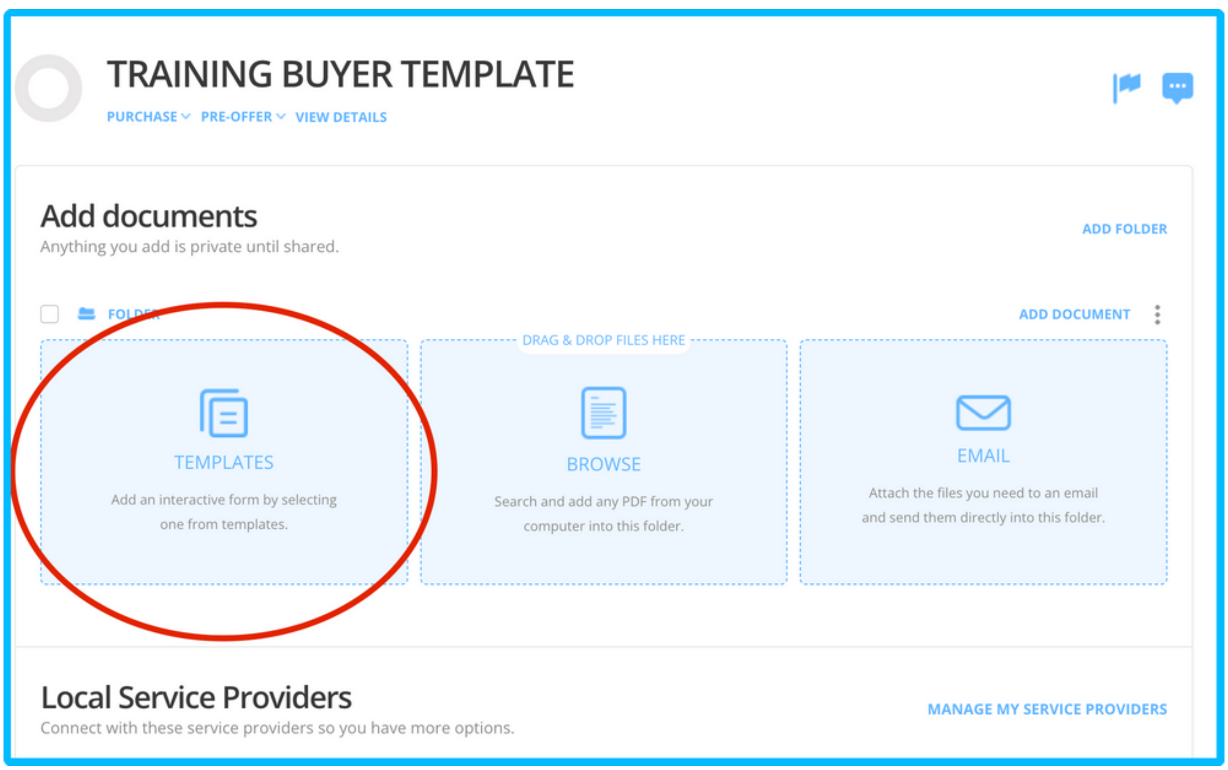


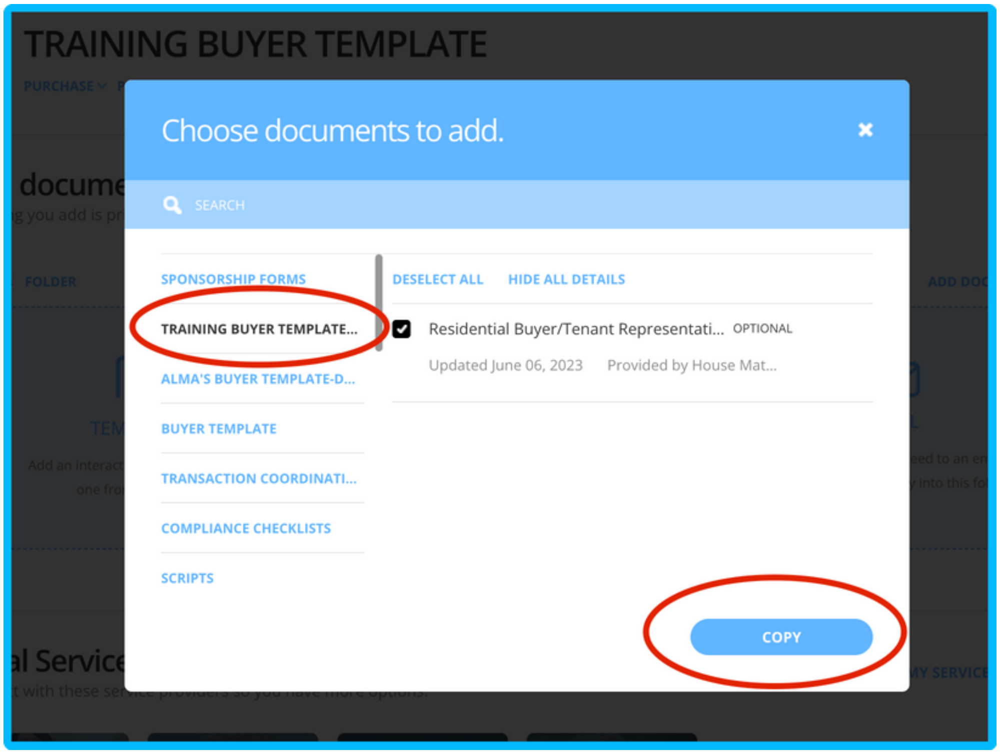




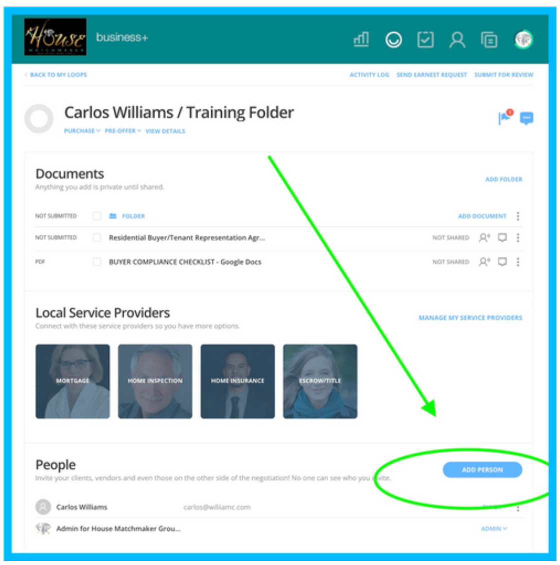


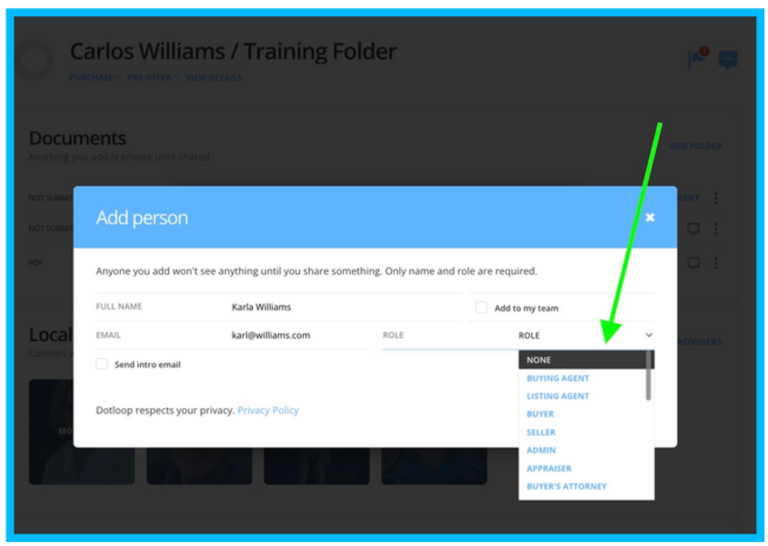
Open Templates and search for buyer template created.



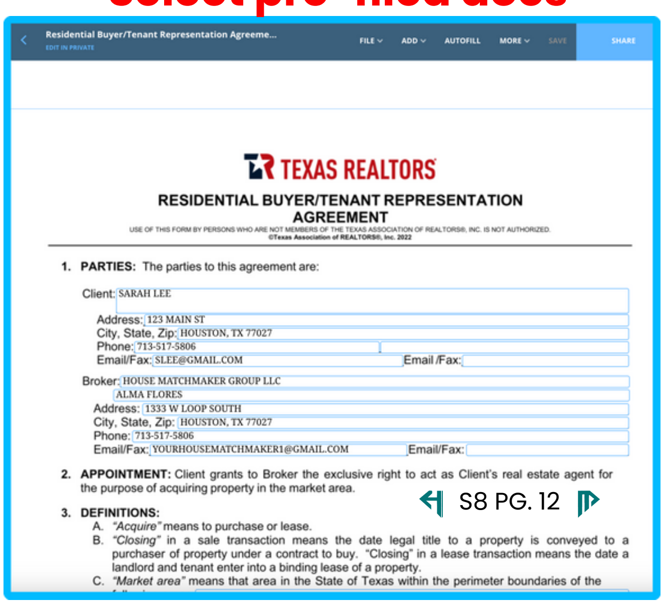


Add People to the Loop



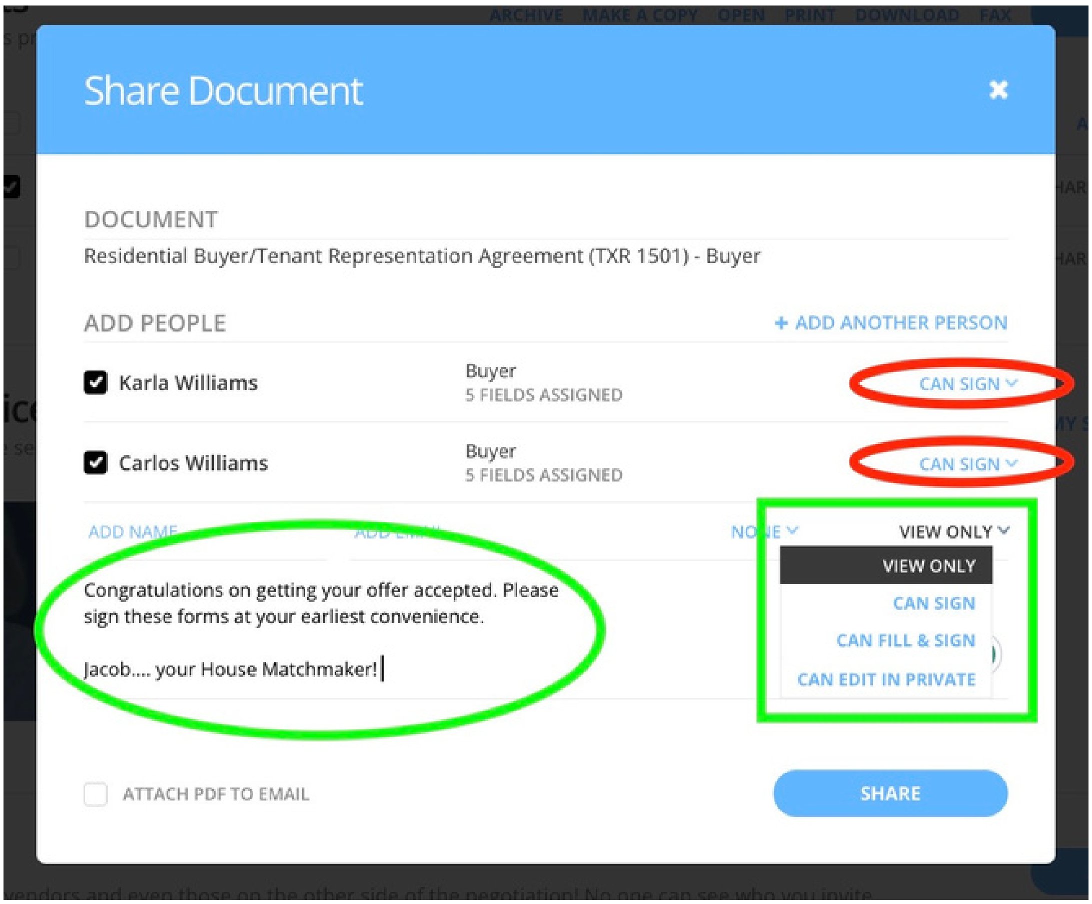


Select pre-filed docs

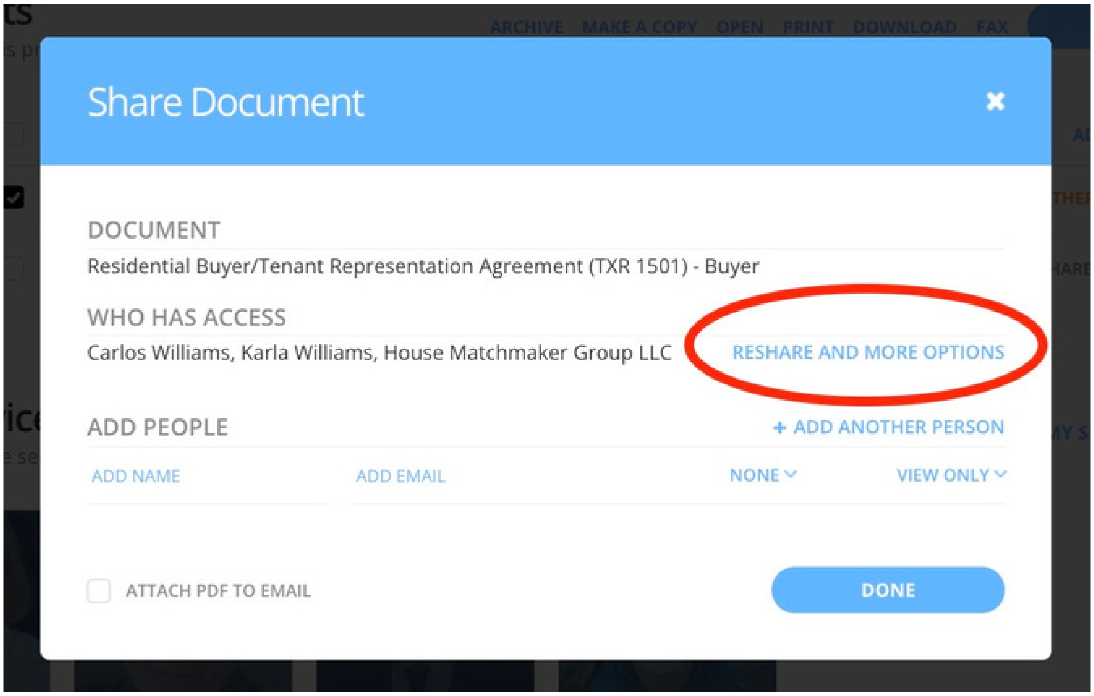


SCAN ME TO REDIRECT TO DOTLOOP'S USER FULL GUIDE

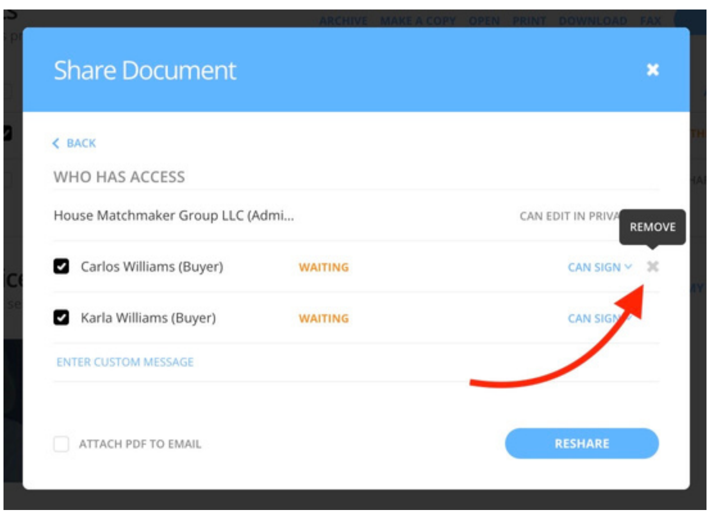
Ready to Share the forms? Don't forget to assign what access the client will have to the documents. Don't forget you can also add a memo/note!

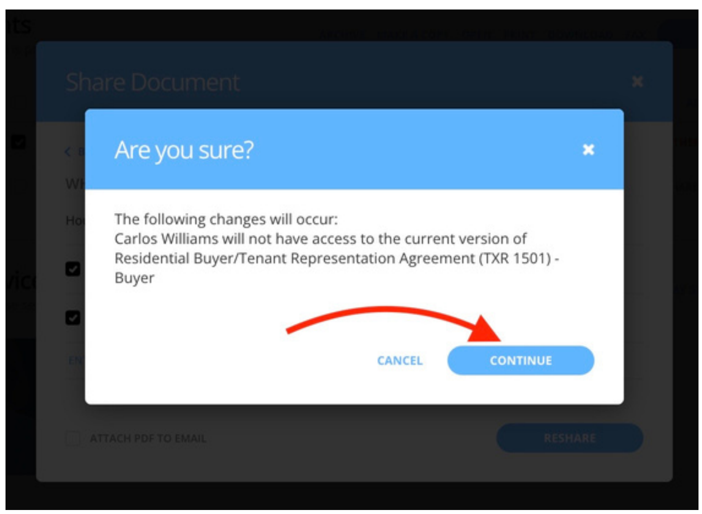


Need to reshare or retain access from the forms recently sent? No problem.



Clar, these next 2 screenshots can be displayed side by side.

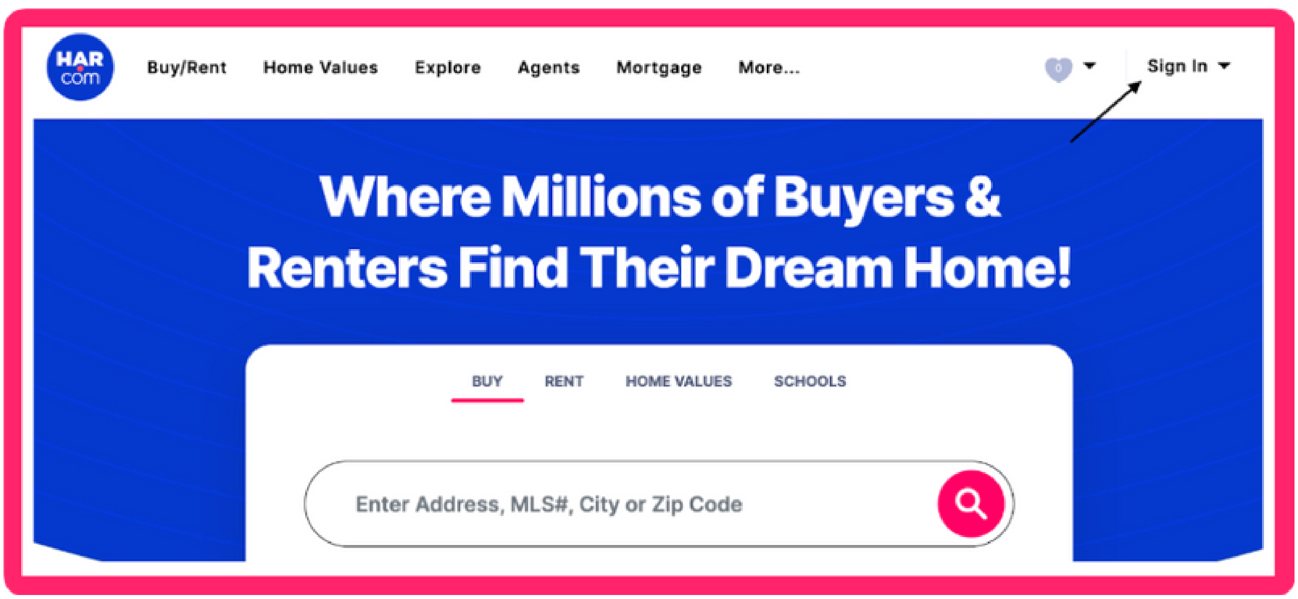




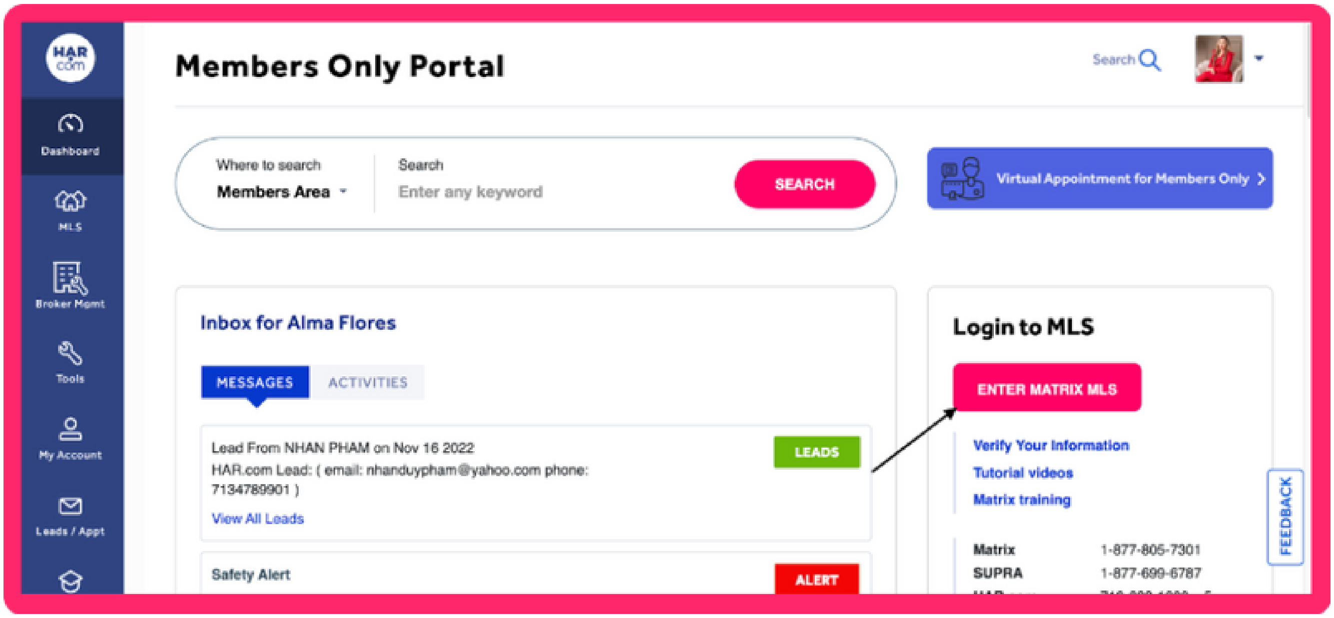
MLS & Finding the Perfect Home

How to access HAR and Search Homes

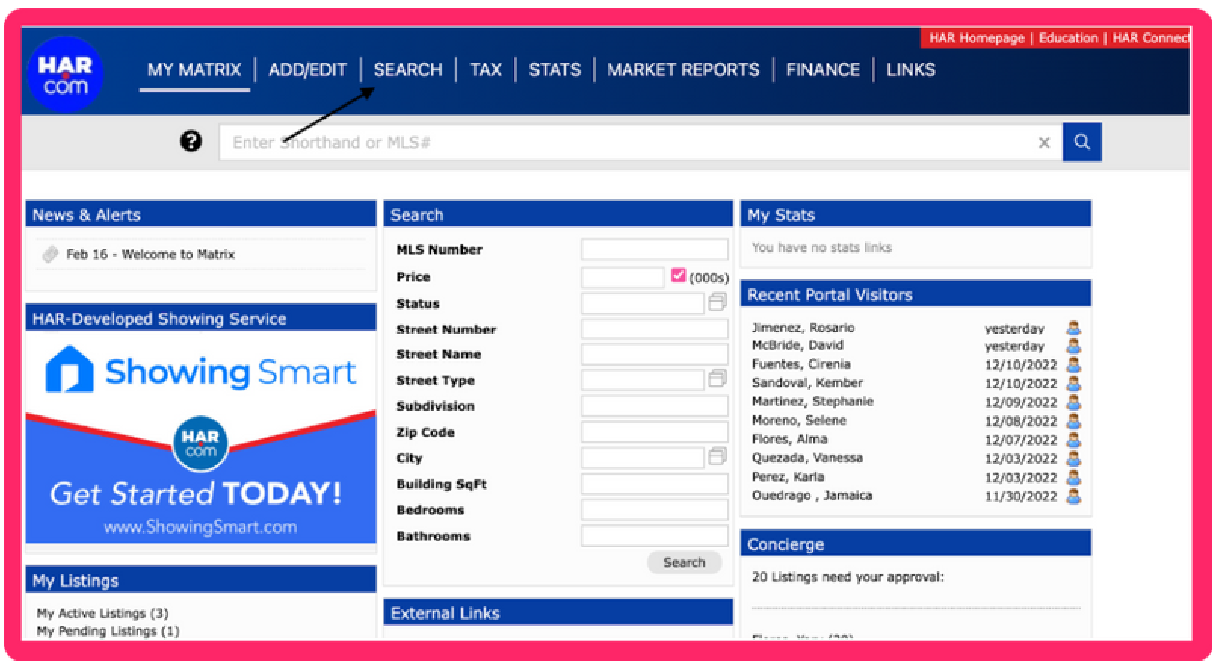
1. Log in to the website:



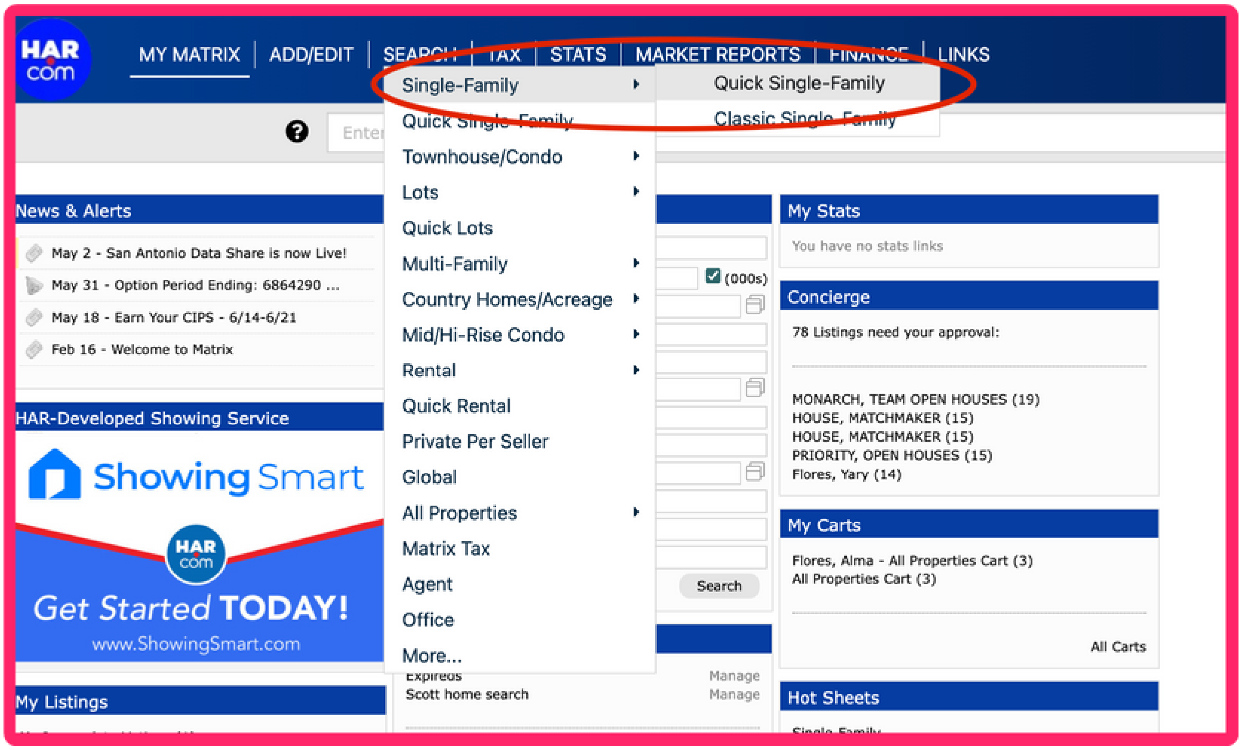
2. Enter Matrix



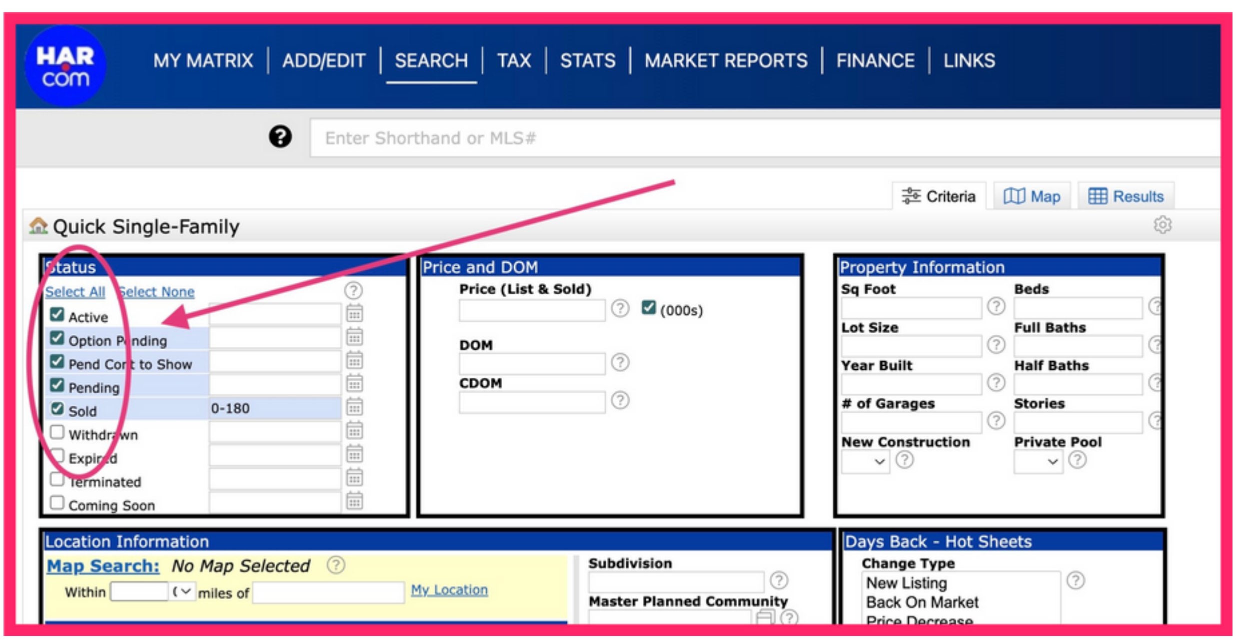
3. Click Search Tab



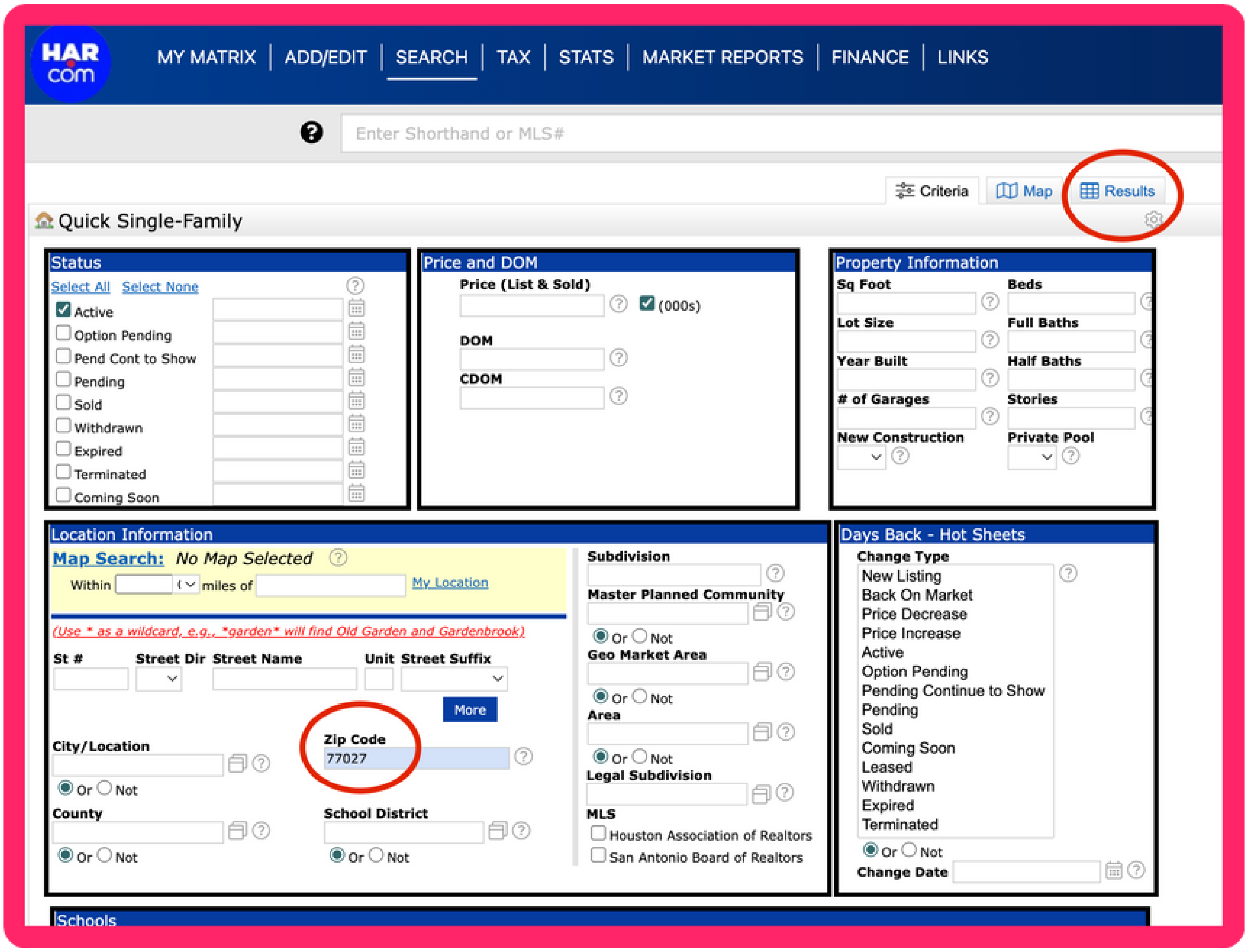
4. Hover over the SEARCH tab and select Quick-Single-family



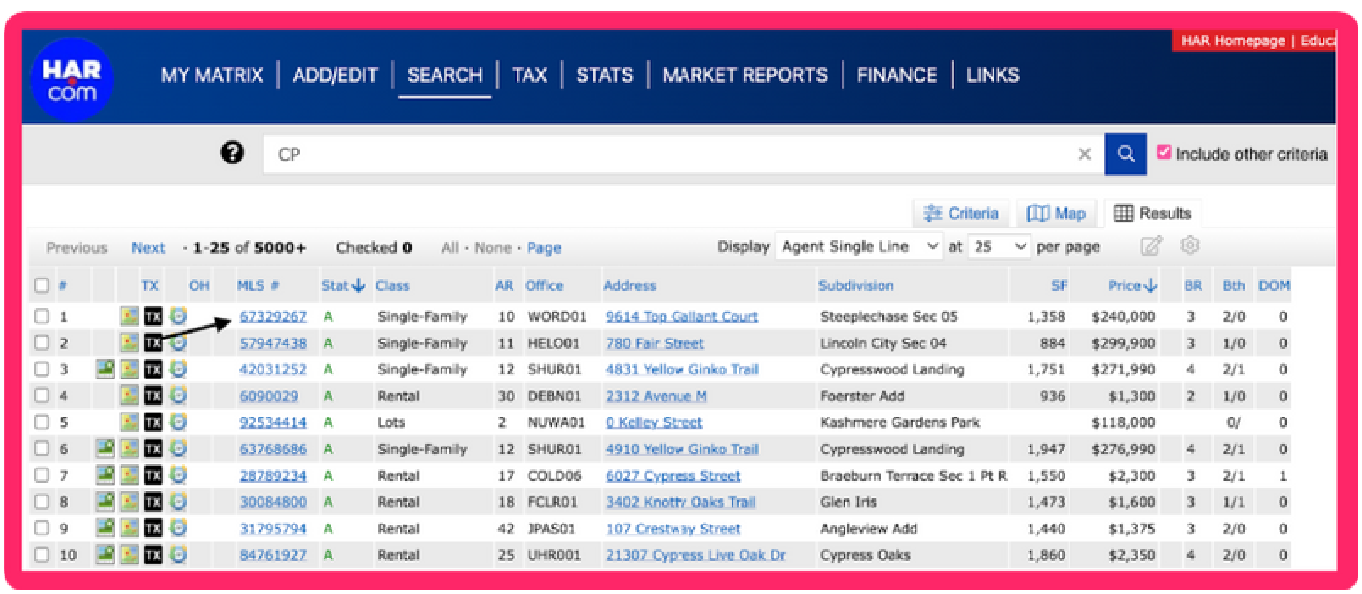
5 . Select the Status of the Listing you want to check :



6. Click the Results

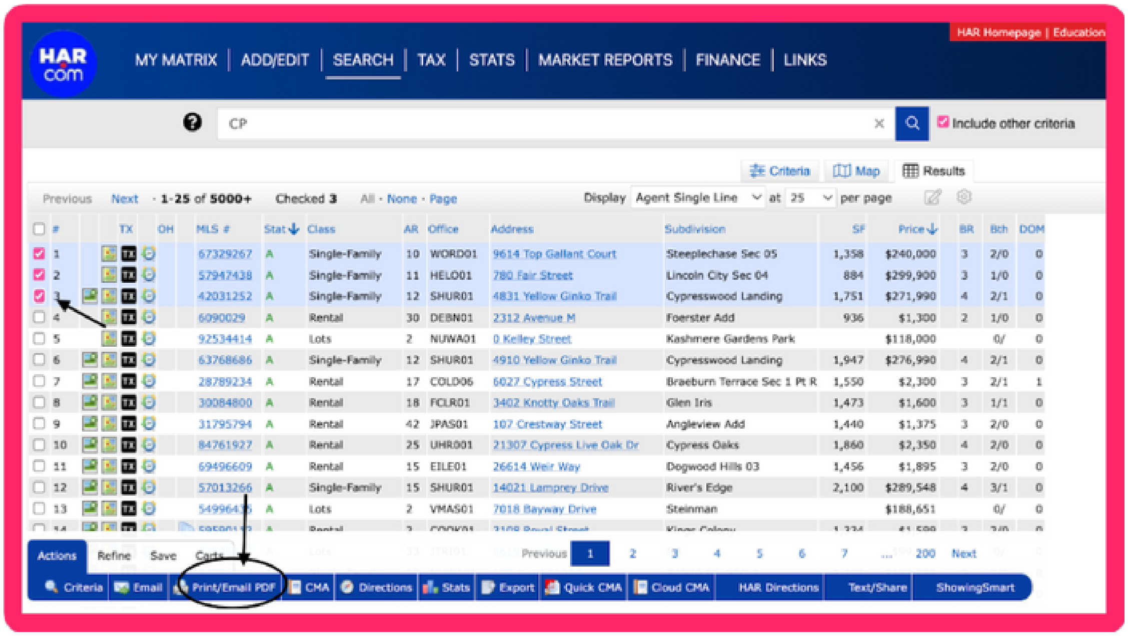


7. Click MLS number to view the property

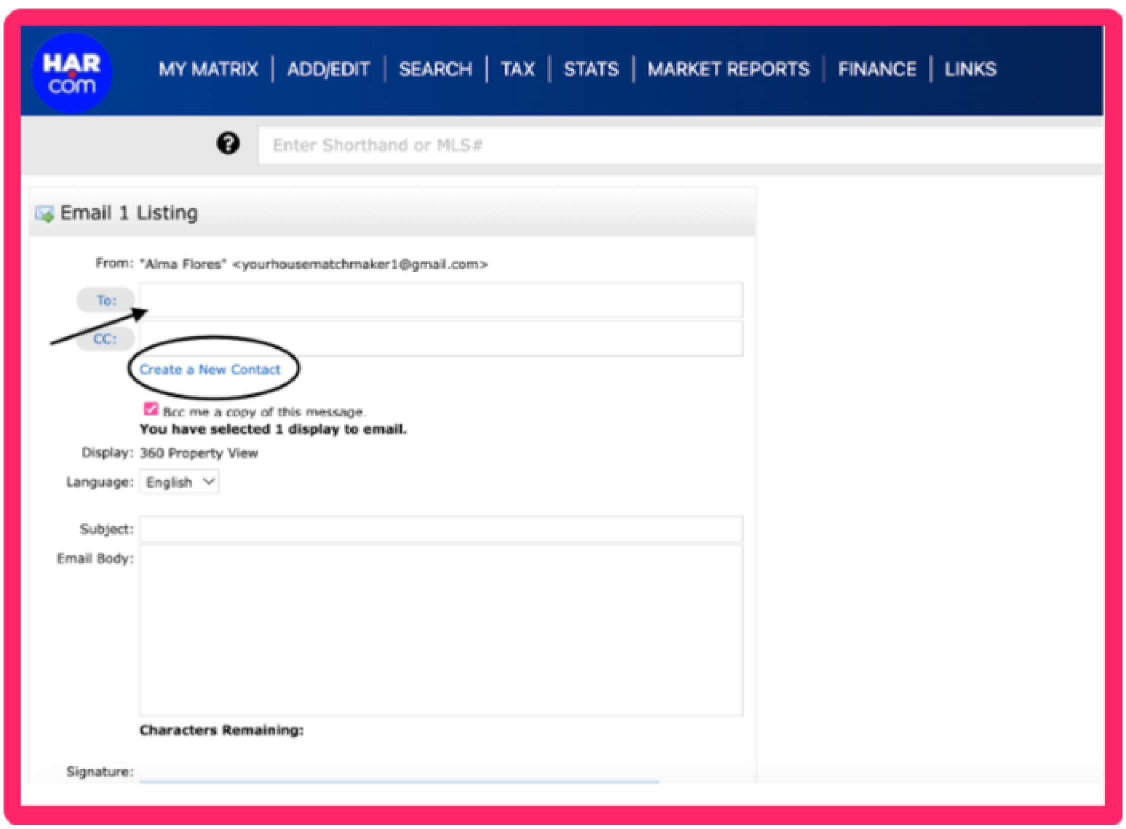


Sending Homes to Clients by Email

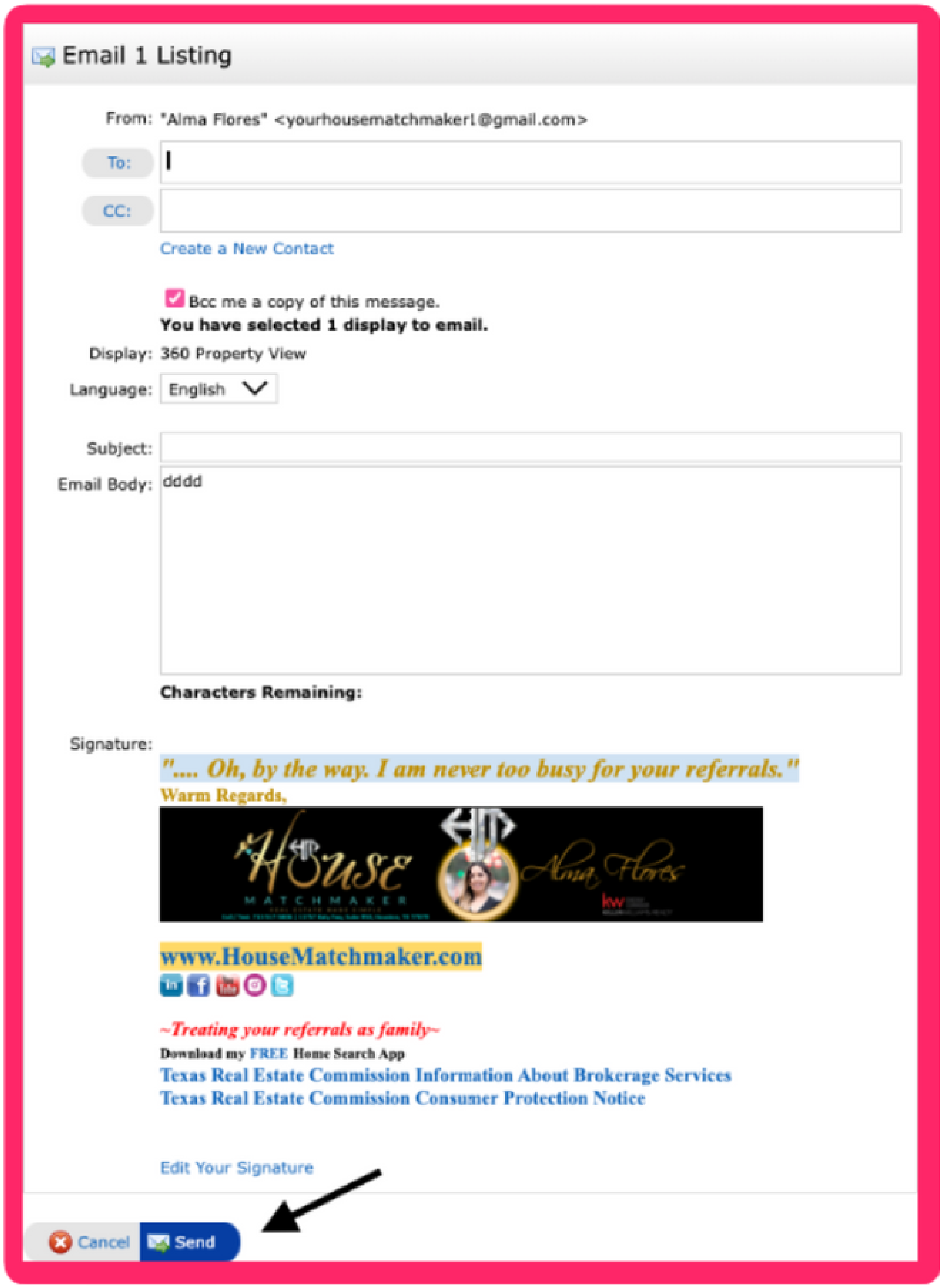
Step 1: Select the properties that you like to Email. Click the checkbox and on the lower part, On the actions Tab please select Email



Step 2: Select the recipient or you can create a new contact and make sure to include a personalized

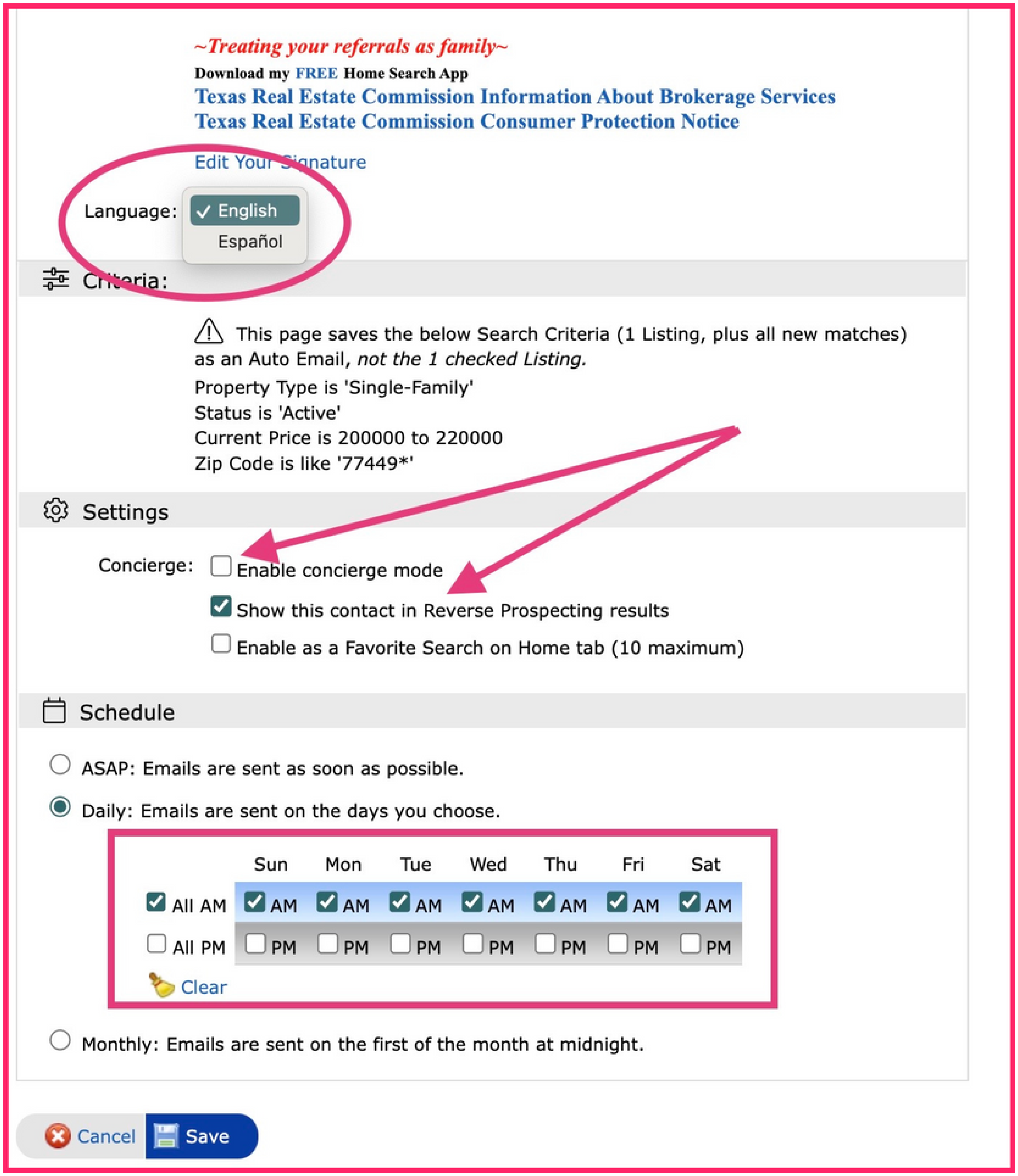


Sending Homes to Clients by Email

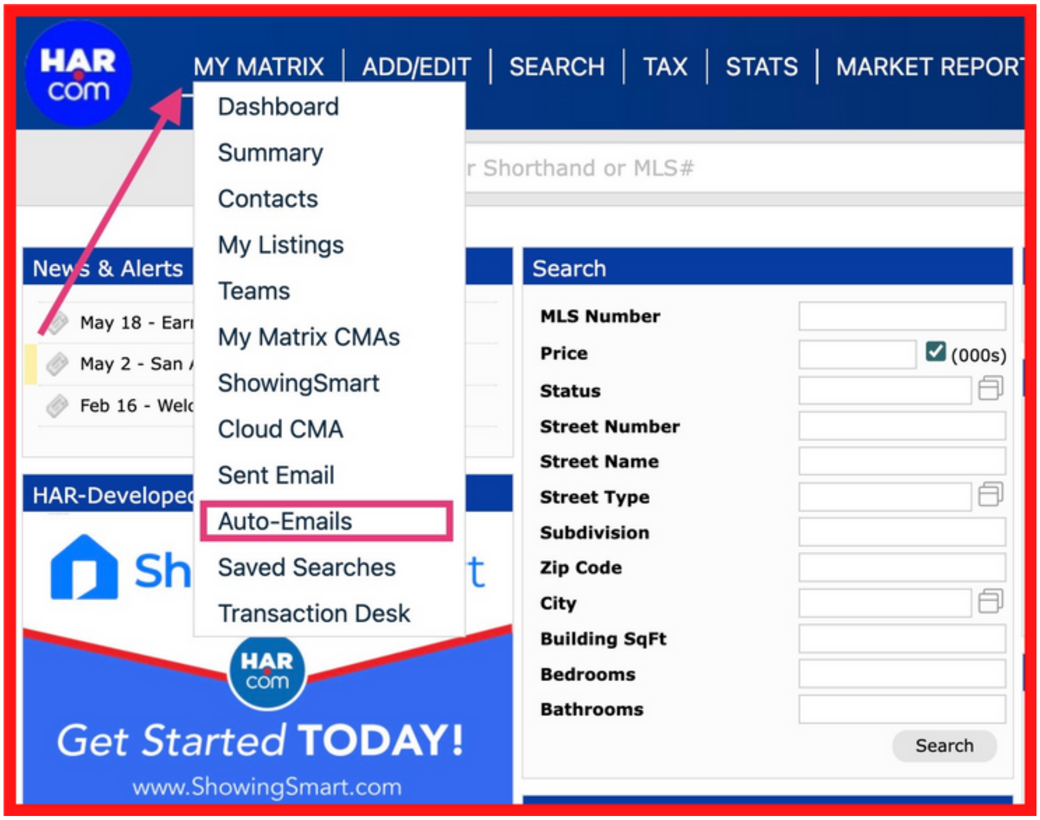


SCAN ME TO REDIRECT TO MATRIX YOUTUBE RESOURCES

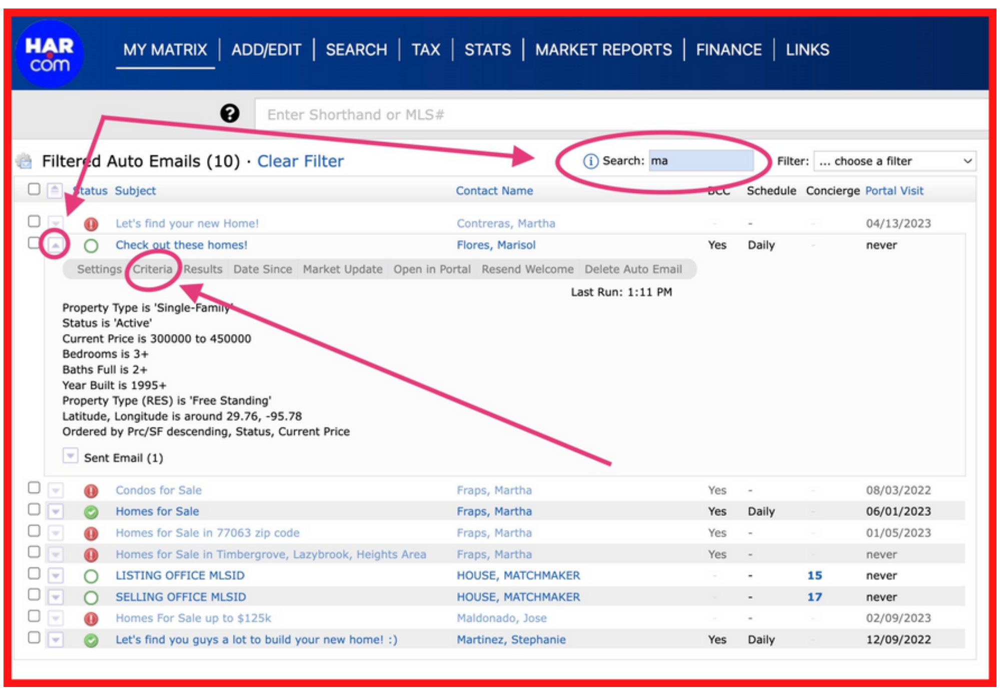
Understanding the Auto Email Plans.



Editing a Previously Made Auto Email Plan

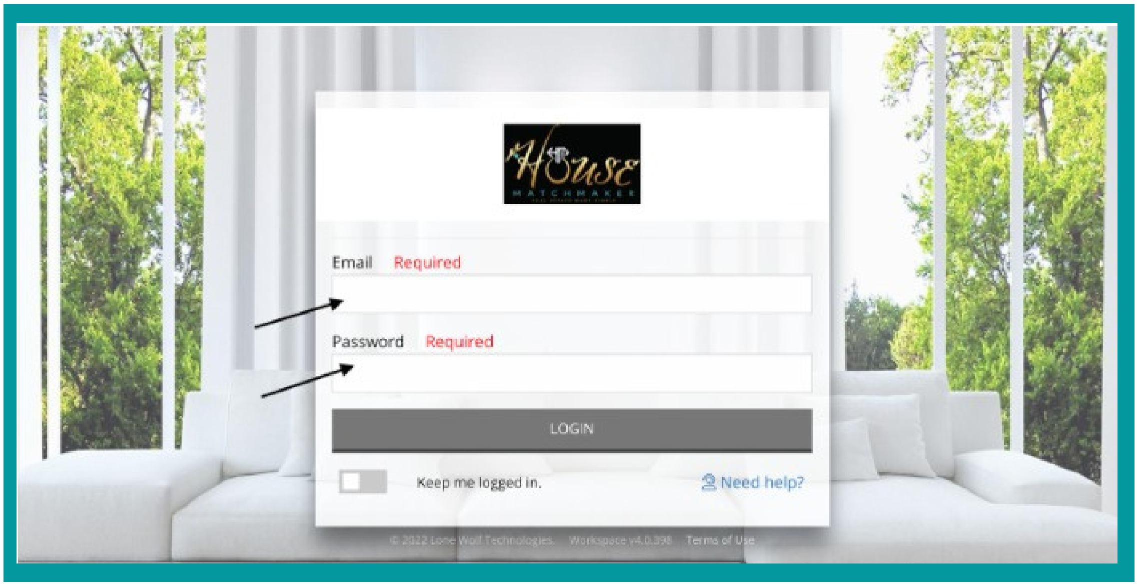


1. Search for the Client's name in the search bar.
2. Click on the drop down menu to the LEFT of the Status Icon
3. Click on the "Criteria" tab to EDIT | UPDATE | CHANGE a set search criteria.



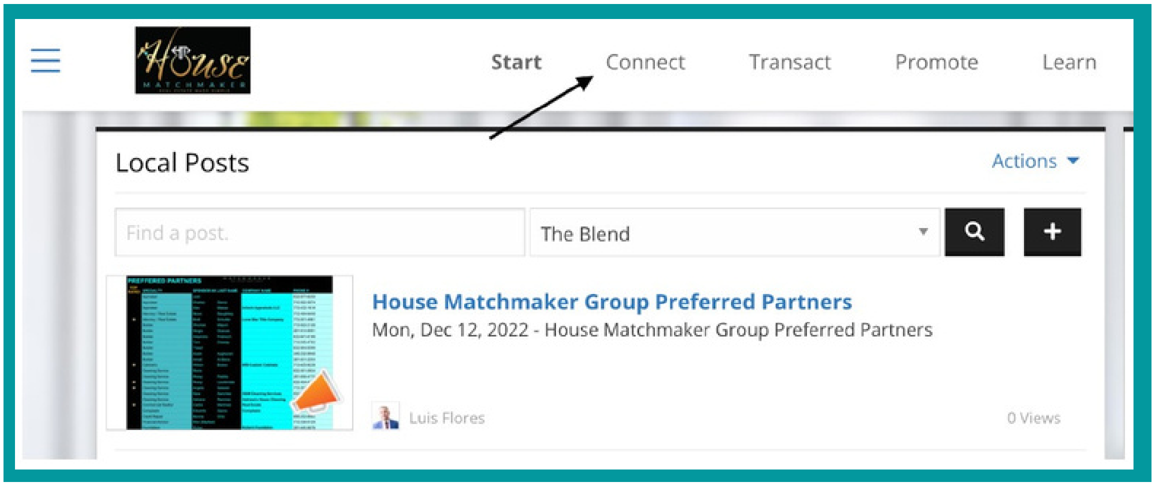
Managing your account in House Matchmaker Intranet

Log in to the Website:

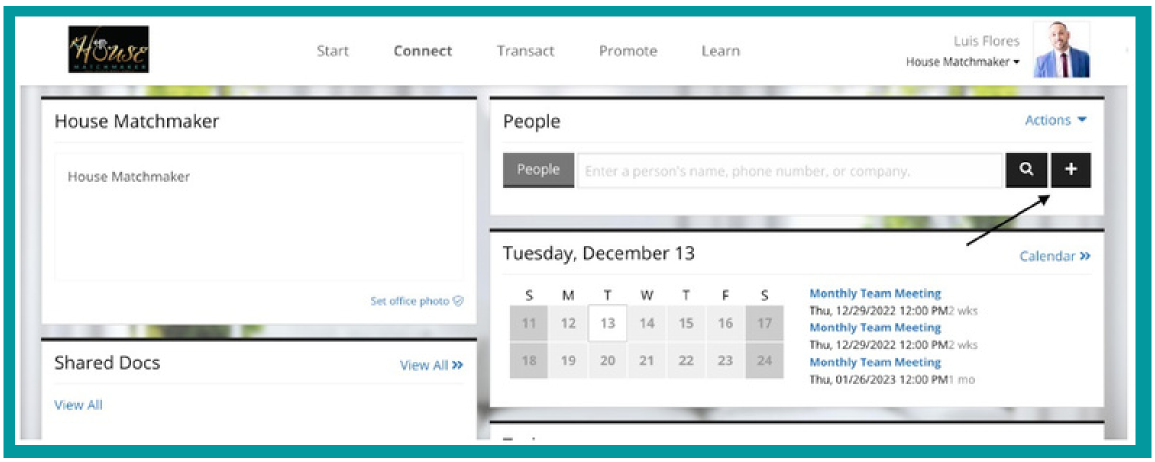


ADDING NEW CONTACT

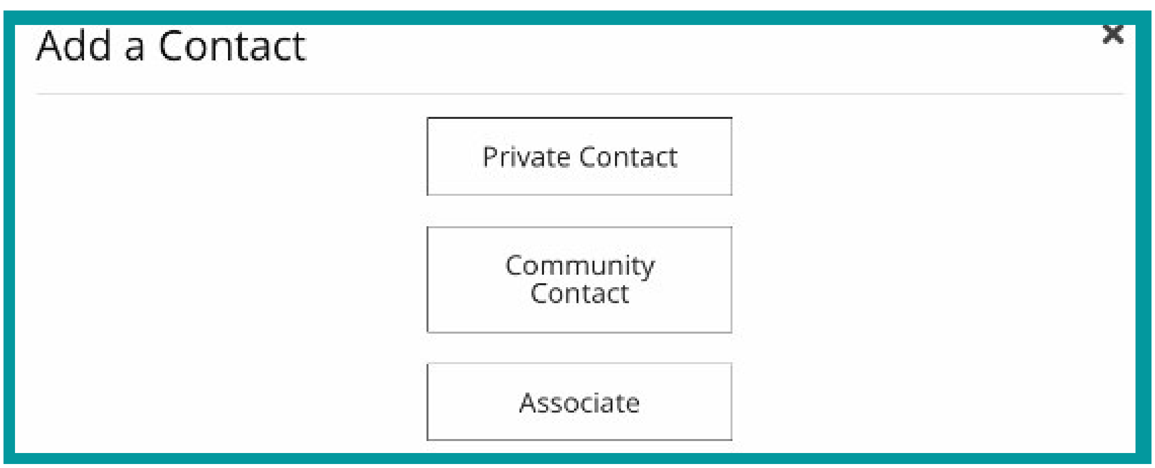
1. Click Connect



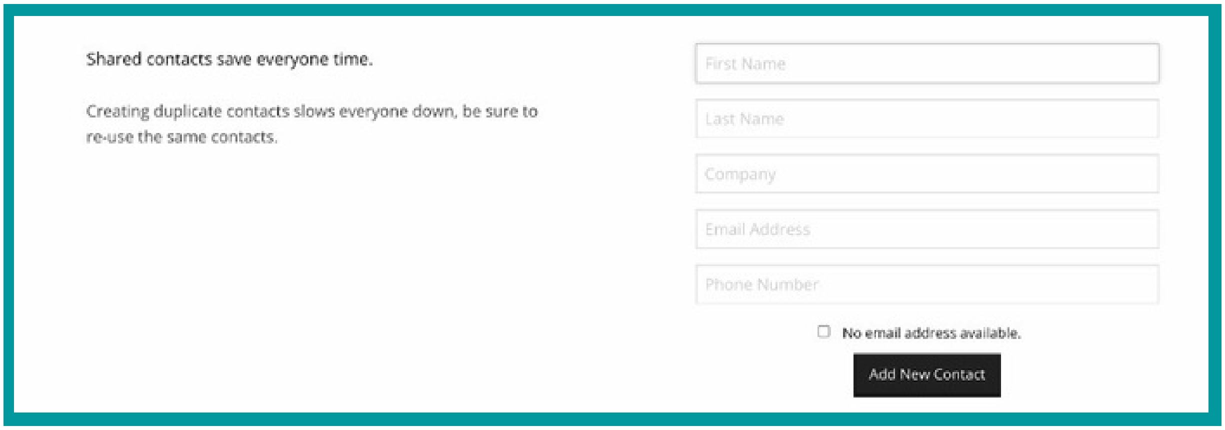
2. Click the Add Button



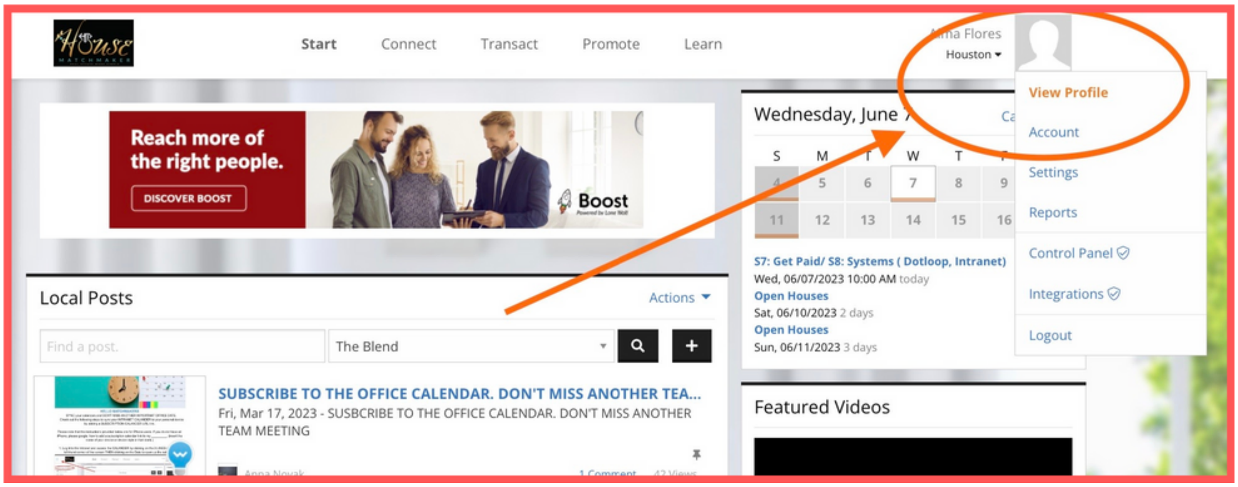
3. Choose the role



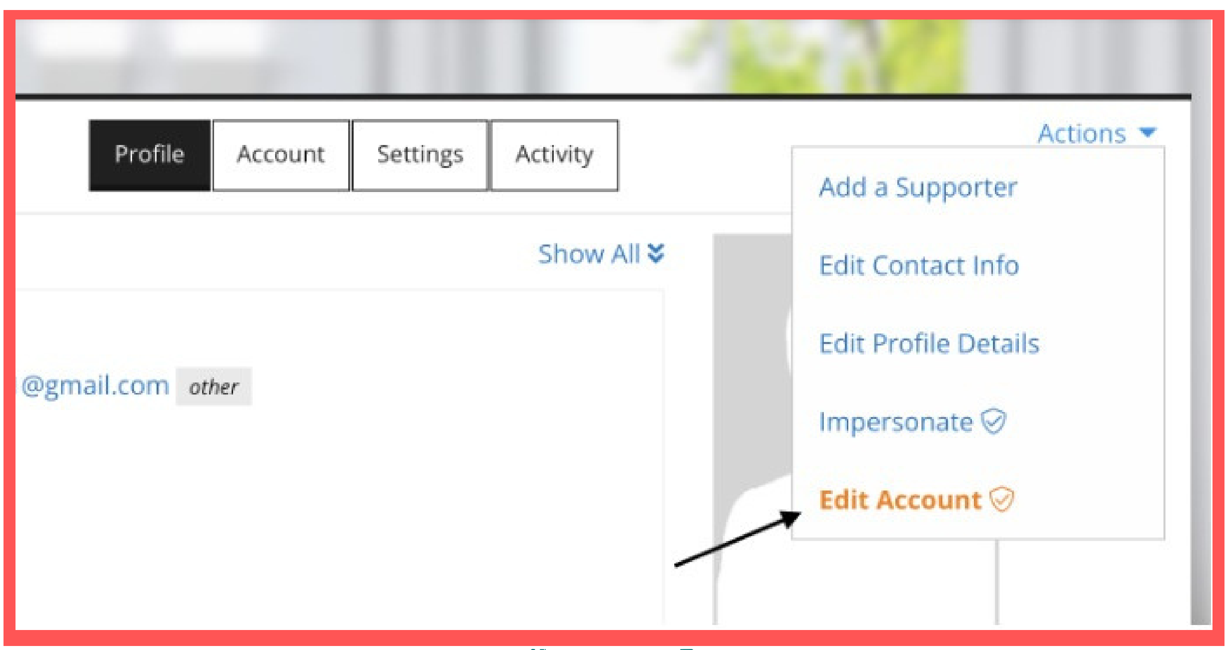
4. Fill out the information



NOTE: FOR ASSOCIATES

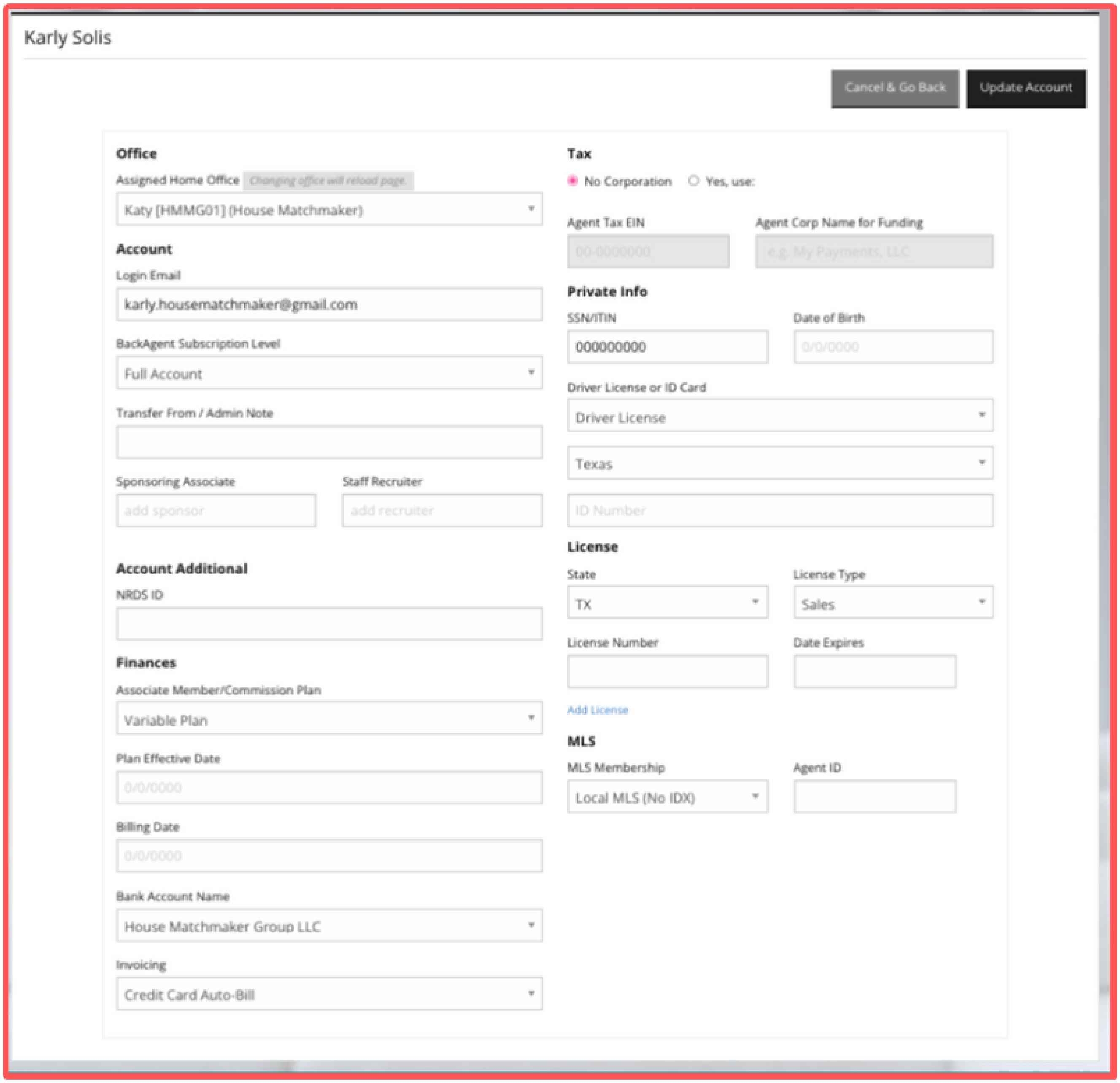


Click your name and click Edit Contact Info



All the information should be filled out and updated

Filling in your info for tax end-of-year 1099 forms is essential for accurate reporting, compliance, and minimizing risks. It ensures proper tax assessment, transparency, documentation, and financial integrity within the industry.


Karly Solis

Cancel & Go Back | Update Account

Office

Assigned Home Office — *Changing office will reload page.*

Katy [HMMG01] (House Matchmaker)

Account

Login Email: karly.housematchmaker@gmail.com

BackAgent Subscription Level: Full Account

Transfer From / Admin Note

Sponsoring Associate: add sponsor

Staff Recruiter: add recruiter

Account Additional

NRDS ID

Finances

Associate Member/Commission Plan: Variable Plan

Plan Effective Date: 0/0/0000

Billing Date: 0/0/0000

Bank Account Name: House Matchmaker Group LLC

Invoicing: Credit Card Auto-Bill

Tax

No Corporation | Yes, use:

Agent Tax EIN: 00-0000000

Agent Corp Name for Funding: e.g. My Payments, LLC

Private Info

SSN/ITIN: 000000000

Date of Birth: 0/0/0000

Driver License or ID Card: Driver License

Texas

ID Number

License

State: TX

License Type: Sales

License Number

Date Expires

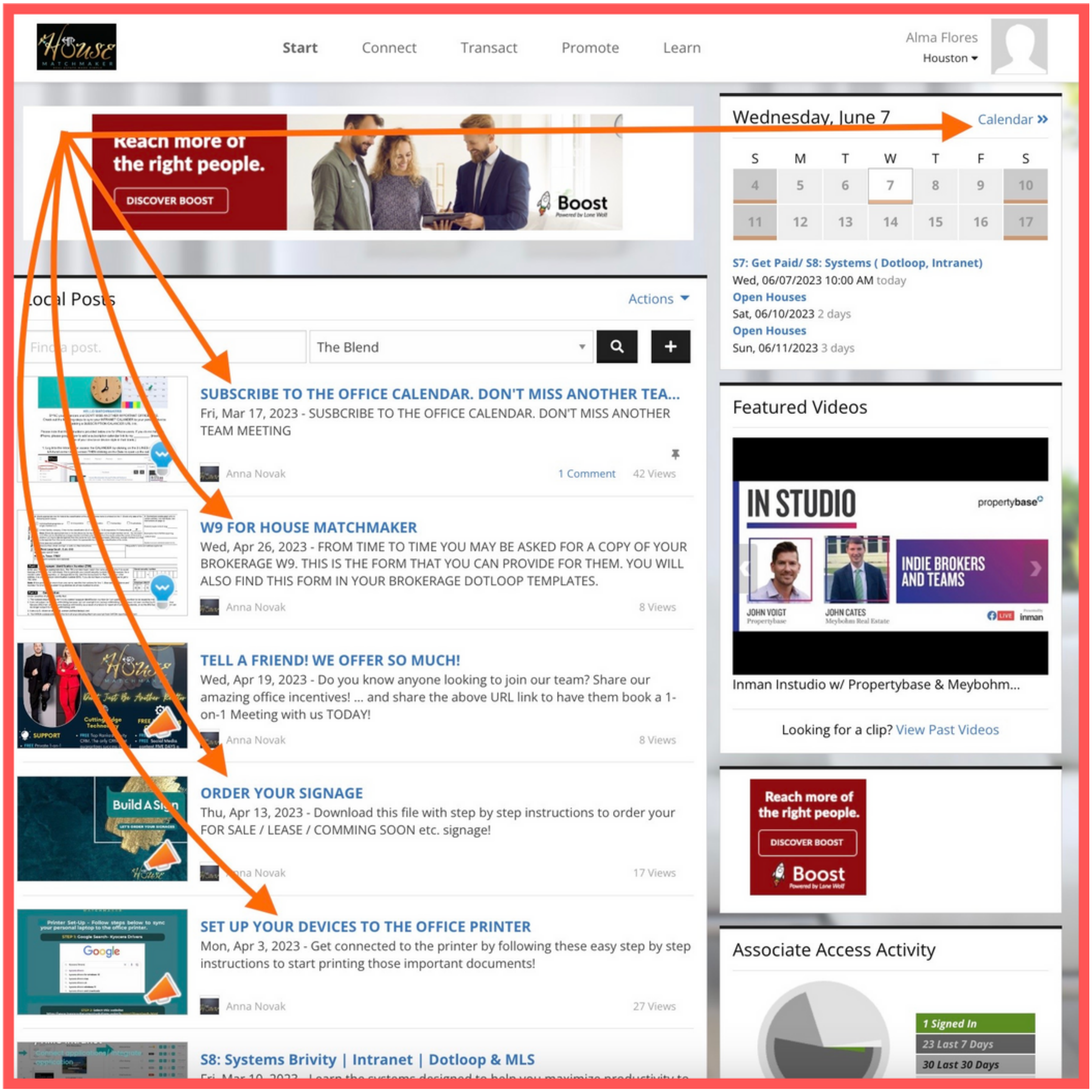
Add License

MLS

MLS Membership: Local MLS (No IDX)

Agent ID

Take advantage of all the amazing tools and resources provided for you.



The Calendar: Don't miss out on the Office Activity. Access your Open Houses, plan to attend any missed or new training sessions and join us at our next Monthly Team Meeting.