we have a new front end team member in our MBC project. We have to deliver on the business insight and system relationship with the business to him so that he can contribute as early as possible. At fast we will share why we are going to develop this system. Previously our client had to use around 10 different systems to perform different tasks, here we will find everything under one platform. Let me share a video transcription where our client shared an end to end scenario of a real estate transaction journey and the business flow.

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Okay, here's the real estate transaction journey.

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Just an end-to-end overview.

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So the first thing that happens is we get a lead.

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Somebody who might buy, sell, rent, or lease a property.

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So we do that through marketing.

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And we use FollowUpBoss to capture that.

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And FollowUpBoss is our CRM.

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So it allows us to organize all of our different contacts.

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And keep track of our communication with them with some other information, tracking deals, little reminders, tasks, where they came from, that kind of information.

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So we really just use follow a bus to manage all of our contacts.

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So then we schedule an appointment with that person.

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And then we go see that person at their house We go meet with them And we going to walk through the listing side So we show up to their house We done a bunch of research We think we know how much of the house can sell for

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We walk through and look at it.

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And while we're there, either on our computer or on our phone, we will add a new seller info sheet in our system.

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It's an intake form.

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And we'll go through and fill this whole thing out.

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This is our way of taking notes on everything we need to have to get the property listed for sale and write a contract to work with this seller.

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Our specific team, AZ Flat Fee, has a few other things that we include, like how much we're going to charge them as far as a package.

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Other companies don't have that. They agree on just a commission percentage or an amount.

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So there are some subtle differences but then we take notes on everything else A traditional agent would just be working by themselves They would take all this information and then move forward For us we take this information and pass it off to someone else

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It's not uncommon to have assistants.

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It just depends on how big of a team you have, that sort of a thing.

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So once we've done that, what happens in our system is

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it gets submitted, an email notification goes out,

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And you'll see a new cell intake form.

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We've got one under review because Calamity said, ooh, I'll look at this one and take it.

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It's not done yet.

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You can see these two have paperwork sent.

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But we can watch and make sure that somebody's taking care of it.

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Again, very different if you're just a solo agent, which is more common than not.

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But now that we have the information, we jump into paperless pipeline.

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Our competitors are Brokermint or SkySlope There a few other ones out there but those are the big ones And then we create a new transaction So what it called in here we fill out all this information property data so on so forth So now we created a transaction we actually leave and go to another platform called transaction desk There are also different versions of this zip forms and we can also create a new transaction So we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk And then we going to go to the transaction desk

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Brokermint has it internally, my broker cloud, we are going to develop this internally.

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But you create a transaction in here now. Once you're in here, and you've created a transaction,

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you can add forms. So I've already added a couple just to make it go faster.

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And these forms are the contracts that we use to legally represent someone. So we fill all of this

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Once it's done, we send it for signature.

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And you'll add a participant, whoever, whoever's gonna be signing so myself, you're gonna

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have other agents, or the sellers. And then we essentially are going to drag and drop

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whoops, drag and drop different fields on here to be able to say I want them to sign

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Sign right here, this would be the seller.

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So we'll put initials wherever they're required.

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We've got different fields to fill out.

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At the very end, we're going to add some signatures.

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So we'd add a signature for the owner who's signing it, I'd switch the other person to

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say, Oh, this person is now signing here, so on and so forth.

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We send it it's just like DocuSign.

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They receive it they can read it electronically click it fills it out as a signature and sends it back to me Once I have all of these signed we now have a legal contract

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We can represent them and sell their home.

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This is unique to my company.

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My company, maybe a few others, but not the norm.

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We then come create an invoice because we charge an upfront fee.

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So we'll create an invoice in QuickBooks.

[05:28](https://share.zight.com/o0u1eBlb)

You could do it in a different program.

[05:30](https://share.zight.com/o0u1eBlb)

And then we send this invoice out.

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Once they pay it, then we order photos.

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So we schedule with our photographer to go take pictures of the home.

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They also install a for sale sign.

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And then they install what's called a Supra lockbox.

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And that's just a fancy lockbox that we can put keys in.

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And you have to have a special app on your phone that only real estate agents can have to open that lockbox and it tracks who opens it Those lockboxes are pretty expensive So we track them So then we have to

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It's super, super helpful.

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This is also something that we will ultimately build into my broker cloud as a field.

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So that way you can enter some basic information and run a quick inventory report and see where all of your inventory is.

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So now that we've got the marketing done, we list the home active on the NLS.

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So I don have a tab for that open because it doesn really tie into my broker clock But that is what pushes all the photos and information out to every website like Zillow realtor homes They all connected to the MLS So that goes out People become interested They reach out to us to

[07:16](https://share.zight.com/o0u1eBlb)

schedule a time to go look at the house. So a buyer's agent will reach out to us, the listing

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agent, to schedule time to go see the property. When they go see the property, they may like it.

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They want to now submit a purchase offer.

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So before I go to purchase offer,

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I'm just going to say while the home is being marketed before sale,

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one of the things we do is we go capture the information that we have for each property

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and we put it into a report for our sellers.

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So you can see we started with the oldest ones.

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But we go look at how many marketing views they have, and I think separately, I'm going

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Our marketing team is trying to replicate this process so we can pull it in.

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That'd be phenomenal to tie in as an additional module from my broker cloud.

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So the client can log in and just see this automatically.

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We don't have to manually tabulate it every, every week.

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Okay. So now we get purchase offers there.

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And so that's why we built the portal.

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And so outside agents can go submit a purchase offer.

[08:42](https://share.zight.com/o0u1eBlb)

And so they'll find a property, right?

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They want to submit on this property and then they fill out all this information.

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They upload their documents.

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They add their contact information.

[09:00](https://share.zight.com/o0u1eBlb)

They submit it.

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The reason we do that is because sometimes it can be quite a bit So there not a ton of purchase offers for this property but there quite a few

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There's 11.

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Some properties have 20, 30, 50, 80 or more.

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And so being able to see these side by side is so helpful.

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And it's really helpful for the client because the client has the same view.

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So they can log in and we can talk through it on the phone.

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And they're looking at the same thing, more or less.

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We have a couple sections that are hidden.

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We have private notes for admin.

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But then the customer can make a note on a specific purchase offer.

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You can see there's back and forth where the client made a note.

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We make a note.

[09:54](https://share.zight.com/o0u1eBlb)

We make a note.

[09:55](https://share.zight.com/o0u1eBlb)

Kind of back and forth.

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The client can also click and open all the documents that are attached.

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So it really really convenient for the client and for us We can also filter by different things So I can easily view or hide details

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And then we say, hey, really what I want is to make the most money.

[10:16](https://share.zight.com/o0u1eBlb)

So I'm going to sort by final net offer.

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And now change the order.

[10:22](https://share.zight.com/o0u1eBlb)

This is ascending, so we're going to change it to descending.

[10:27](https://share.zight.com/o0u1eBlb)

And now I see this is the offer that's going to make me the most money.

[10:33](https://share.zight.com/o0u1eBlb)

Followed by this one and this one. So let's look real close at these. And that's how we start to

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work through multiple multiple offers, we can mark a couple of them as favorites. So we can

[10:47](https://share.zight.com/o0u1eBlb)

ultimately just view favorites. So when we're sorting through lots of them, we say no, no, no,

[10:53](https://share.zight.com/o0u1eBlb)

oh, I like this one. I like that one. So it's not really a big deal when we're only managing a

[11:02](https://share.zight.com/o0u1eBlb)

A couple of offers but sometimes we get so many that this is the only way to really effectively share the information with our clients Okay now we like this offer and we going to negotiate with the buyer So

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the listing agent will negotiate with a buyer's agent.

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Buyer's agent will talk to the buyer client, listing agent will talk to the selling client.

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But only the two agents talk to each other to negotiate.

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What ends up happening is we go back to Transaction Desk, which is where we fill out forms.

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And we add a new form.

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We're going to add a counter offer.

[11:48](https://share.zight.com/o0u1eBlb)

And then we're going to fill this out and say, hey, we liked your purchase offer, but we want to change these things about it.

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Maybe I want you to pay a little bit more or I want to change the date of something.

[12:02](https://share.zight.com/o0u1eBlb)

And then I send this out for signature.

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We send it to the client and we go back and forth.

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Once

[12:10](https://share.zight.com/o0u1eBlb)

Once we've got all that done, and as we go along, we're adding all of our contacts to Paperless Pipeline.

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So that way we can keep things organized.

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So now I'm dealing with a client or a cross agent.

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I can log in to this specific property and I know what's going on.

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I know how much it's listed for.

[12:34](https://share.zight.com/o0u1eBlb)

I know all my important dates and key admin information, who else is working on the file,

[12:43](https://share.zight.com/o0u1eBlb)

all the other contacts, buyer's agent, the buyer's agent has an assistant, a transaction manager.

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They actually have a couple different agents working on this.

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We've got the buyer's names just for reference, our seller. And so then we upload all of our

[13:03](https://share.zight.com/o0u1eBlb)

So we can upload all of our documents we go under contract We upload those into a different section

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We make notes along the way.

[13:21](https://share.zight.com/o0u1eBlb)

Sometimes from here because we're already in the system and we bounce around so many times.

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It's really nice to be able to create an email and email the message to the client or whoever else.

[13:36](https://share.zight.com/o0u1eBlb)

So that's really, really nice.

[13:43](https://share.zight.com/o0u1eBlb)

Okay, once we've done all that, we've uploaded those things, we have negotiated the counteroffer,

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We work with a title company and an escrow company.

[13:58](https://share.zight.com/o0u1eBlb)

They manage a lot of legal paperwork with the local government for actually transferring ownership of the property and holding onto the money for the sale until everything complete We got some more inspections and back and forth and negotiations that occur

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In the meantime, we are making sure that all the tasks that we're supposed to do

[14:24](https://share.zight.com/o0u1eBlb)

are getting checked off and completed.

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So documents and tasks are obviously a big part of my broker cloud.

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We manage the commissions.

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Right.

[14:38](https://share.zight.com/o0u1eBlb)

So we've got that same commission module or a similar type of commission module that we're going to make even better.

[14:45](https://share.zight.com/o0u1eBlb)

Steal some ideas from my broker cloud.

[14:48](https://share.zight.com/o0u1eBlb)

And that way we've got a financial section.

[14:50](https://share.zight.com/o0u1eBlb)

So we know how much we are supposed to get paid.

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We have a CDA.

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That should be down here.

[14:58](https://share.zight.com/o0u1eBlb)

That we can send to the title and escrow company.

[15:02](https://share.zight.com/o0u1eBlb)

So they know how much to pay us.

[15:05](https://share.zight.com/o0u1eBlb)

And then they know how much to pay the other company right here Right And then we also know how much to pay our agents

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So once we've completed all of that,

[15:21](https://share.zight.com/o0u1eBlb)

the buyer and seller sign legal paperwork,

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typically at the title company,

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because they have to have a special person called a notary

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who verifies the identity of the people signing

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and then watches them sign.

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Once all that's done, our broker logs in to paperless pipeline, and we'll review every

[15:45](https://share.zight.com/o0u1eBlb)

document. So our broker actually does this along the way, it's not all at the end. But

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you can see, here's one, this purchase contract was uploaded. And our broker left a note that

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initials need to be taken off line 181. You can see here.

[16:07](https://share.zight.com/o0u1eBlb)

Clearly they should not have signed both because it's signed here if the house

[16:11](https://share.zight.com/o0u1eBlb)

So, this is where the AI assistant

[16:41](https://share.zight.com/o0u1eBlb)

Review assist will help.

[16:43](https://share.zight.com/o0u1eBlb)

So that way when an agent uploads this, the AI can scan these documents and say, hey, this doesn't make sense.

[16:50](https://share.zight.com/o0u1eBlb)

Are you sure this is correct?

[16:51](https://share.zight.com/o0u1eBlb)

And they can fix it, upload it.

[16:55](https://share.zight.com/o0u1eBlb)

And then when the broker reviews it, they should all be correct most of the time because the agents have already been prompted by the AI to go fix it.

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Then once everything done the property closes Then we get paid based on the CDA that we sent to the title escrow company

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And we go back into QuickBooks, which is where we manage things.

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And most people manage their financial information.

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We deposit our checks to the bank.

[17:34](https://share.zight.com/o0u1eBlb)

We come in here.

[17:35](https://share.zight.com/o0u1eBlb)

We receive payment just to track that we receive payment. And then we'll come to the agent. And we pay that agent, our company pays with direct deposit. Other companies might pay with a physical check. But either way, it needs to get tracked. Obviously, something else that we want to be able to do through our system, so we don't have to leave.

[18:05](https://share.zight.com/o0u1eBlb)

And then there's other things along the way.

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Sometimes we need reference documents And so again in paperless pipeline we have a reference section with documents This is kind of like the drive that we building in My Broker Cloud

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So that's where they'll go for those.

[18:24](https://share.zight.com/o0u1eBlb)

And then we've got a bunch of different reports.

[18:28](https://share.zight.com/o0u1eBlb)

So we've got...

[18:32](https://share.zight.com/o0u1eBlb)

These are a challenge because every one of them you have to

[18:37](https://share.zight.com/o0u1eBlb)

So, same kind of thing.

[19:04](https://share.zight.com/o0u1eBlb)

I do look at a bunch of different reports to see how the company doing what projected how the agents are doing And that kind of start to finish Once it done we mark it as closed

[19:20](https://share.zight.com/o0u1eBlb)

Every month we will back up all of our, all of our properties.

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So we download a backup, a copy of everything.

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Um, the other thing is.

[19:38](https://share.zight.com/o0u1eBlb)

Agent onboarding and training.

[19:45](https://share.zight.com/o0u1eBlb)

There's no real clean system.

[19:47](https://share.zight.com/o0u1eBlb)

So we actually run them through something else that we've created

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to kind of teach them how to do the things we want them to do.

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A basic learning management system.

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And that's a 20-minute summer.

[20:04](https://share.zight.com/o0u1eBlb)

So I know that was not quick at all.

[20:08](https://share.zight.com/o0u1eBlb)

That is the highest level overview I could come up with though. There are

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There's so many more details along the way, but that's the flow.

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So we use so many different programs, platforms to do things.

[20:24](https://share.zight.com/o0u1eBlb)

And this is without looking at the emails, right?

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So our team uses a bunch of different shared emails.

[20:31](https://share.zight.com/o0u1eBlb)

It's just a lot of windows open at the same time

[20:34](https://share.zight.com/o0u1eBlb)

as you bounce back and forth between different things.

[20:38](https://share.zight.com/o0u1eBlb)

It makes it kind of hard to efficiently do your job.

[20:42](https://share.zight.com/o0u1eBlb)

And so that's the goal, right? That's the vision. Our vision for MyBrokerCloud is to make real estate sales easy from end to end for brokers, for agents, and for clients.

[21:00](https://share.zight.com/o0u1eBlb)

So really what I want I know I used the term common sense when we spoke last but I think what I really mean by common sense is intuitive All right So I found this the more intuitive everything is just the easier everything is This makes sense

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This feels intuitive.

[21:23](https://share.zight.com/o0u1eBlb)

Do I want to continue?

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Yes.

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Or no, I don't.

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This is obviously an example of quite a bit of confusion.

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Am I confirming a negative?

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No.

[21:36](https://share.zight.com/o0u1eBlb)

Yes.

[21:36](https://share.zight.com/o0u1eBlb)

So this is what we're going for.

[21:42](https://share.zight.com/o0u1eBlb)

Something so simple that we don't have to teach anyone how to use the system.

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They log in and it just works.

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So that's what we want all the way through.

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Nice, smooth, easy flow.

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With that in mind, you all have done a phenomenal job building things out.

[22:04](https://share.zight.com/o0u1eBlb)

But we going to go back through and we going to revise again and again and again And I don mean that in a bad way We going to make some little changes Some of them are going to be bigger changes over time especially as we get user feedback

[22:22](https://share.zight.com/o0u1eBlb)

But that's a good thing because we want it to just flow so smooth.

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So we're going to change the order of little things here and there.

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We're going to keep adding different components to make this stronger.

[22:36](https://share.zight.com/o0u1eBlb)

We're going to have this tie into follow-up boss.

[22:41](https://share.zight.com/o0u1eBlb)

So if we already have a client,

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I don't have to reenter their information.

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Communication is synced back and forth.

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We've got a whole bunch of other plans to go through.

[23:06](https://share.zight.com/o0u1eBlb)

I know these aren't crazy,

[23:08](https://share.zight.com/o0u1eBlb)

but mobile friendly.

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That something I didn talk about much but our agents often will have to jump into all of these different platforms on their phone to check on something

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We want people to be able to go to the website and just sign up, onboard seamlessly, and get started.

[23:30](https://share.zight.com/o0u1eBlb)

And not really need us to help coach them along the way.

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The broker review we talked about, commission plans,

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A whole separate SRS will build out for that, but it's going to make the life of people filling out those commission modules so much easier.

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References to the drive, reporting, a full accounting module.

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So the goal, right, is, like I said, to make real estate sales easy from end to end for brokers, agents and clients, which means you should be able to log into this platform and do everything you need to do really easily.

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It should.

[24:18](https://share.zight.com/o0u1eBlb)

It should be intuitive and just a simple process all the way through.

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So that's 25 minutes.

[24:29](https://share.zight.com/o0u1eBlb)

I hope it wasn't a waste of your time.

[24:32](https://share.zight.com/o0u1eBlb)

Let me know where you have questions, if this helps,

[24:36](https://share.zight.com/o0u1eBlb)

or if maybe we need more detail and break the videos up.

[24:41](https://share.zight.com/o0u1eBlb)

All right. I appreciate you all. Thank you.

After that we need to share how this MBC system works now including all the configurations and other things. and what is implemented so far. I’m sharing a high-level working process in our existing system now.

We’ve 4 major modules in system. Property, Seller intake, Buyer intake, purchase offer (public purchase offer, internal purchase offer)

* First super admin creates Tenant company
* Tenant owner enters into his domain from the email credentials
* After that he configures some data like location, CDA settings, creates users (Agent/Broker/Seller/Buyer/Vendors), assign roles, stage, type, company general info, logo, Template forms etc.
* When all the locations and other configurations are done, then specific users can perform their tasks
* Properties, Template forms, Listing and Buying side documents, and other things may vary to visible based on assigned location to user, role permission and other logics.
* Agent/admin can create/update/delete seller/buyer intake to property or directly can create property, based on role-permission
* Multiple users can enter into a property/seller-buyer intake/purchase offer form and can edit, where concurrency feature is implemented, user will be able to edit one by one from the queue
* Agents can be of listing/buying/listing and buying side of a property, they can be set as primary of any property
* Multiple tasks and document tasks are attached to a property. It also can be imported from Task template under settings
* Agents can partially complete/fully complete tasks
* There are documents are uploaded, document notes can be reviewed by broker/admin
* When a property is listed, there can be listing/active status
* Purchase offer in that property can be submitted from the landing page and from the logged in user accounts
* When purchase offer is submitted from either inside or outside, it can be shared to seller clients.
* Push and email notification, bell icon can be configured for different events in the system
* Email templates can also be created for reducing repeating tasks using dynamic variables
* From different purchase offers, employee notes, client notes can be passed simultaneously for a property
* When deal is finalized, under property > commission settings > filling up the commission form and calculations are done
* After that CDA document is generated which is found under the CDA document under a property
* After that, a property can be closed
* After closing property, we can find around 10 reports in the system that can be generated
* When different user logs in, there is configurable dashboard is found where different reports can be presented based on permission
* We can generate backups of the existing properties in the system
* If any issue occurs, there is support ticket feature is implemented and user can create and super admin responds to those tickets

This is how the system is currently implemented, in V2 some other features are coming.

Based on the above information, align everything properly and provide a solid document so that based on that I can share all the insight with clients pain point to our existing system for better understanding