

InterAcct for Real Estate

InterAcct Software Pty Ltd

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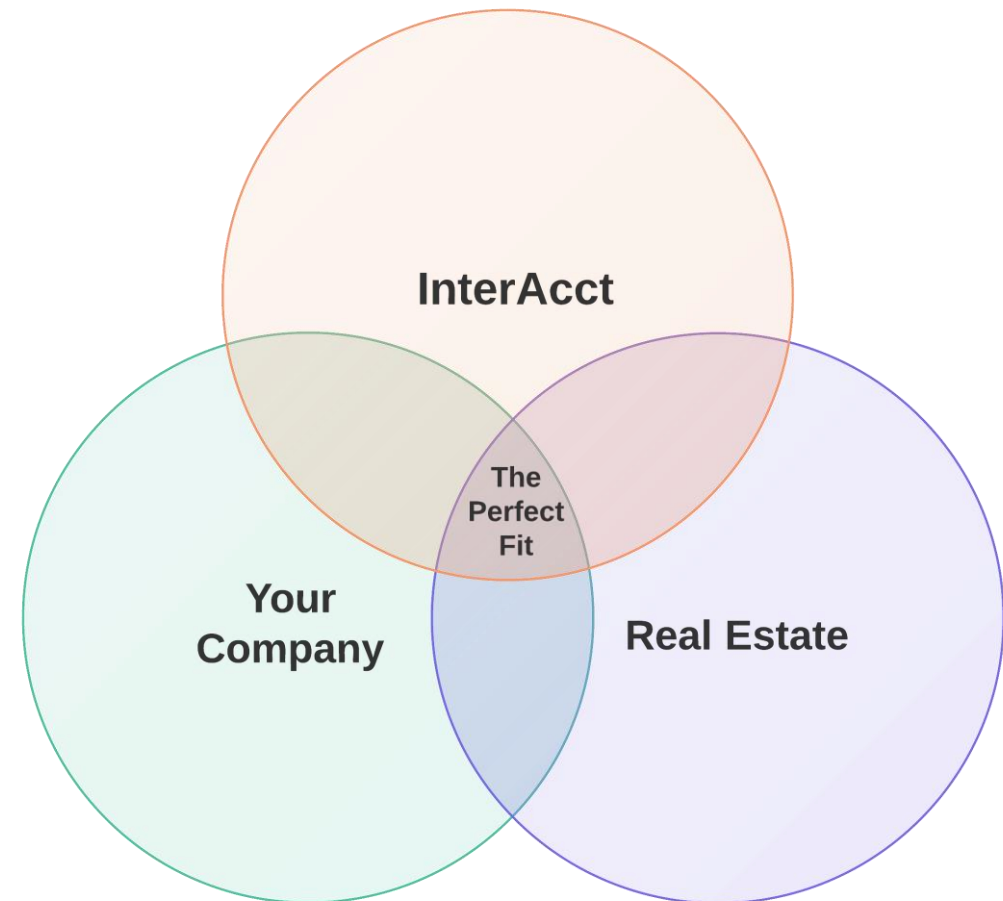




InterAcct for Real Estate

Why InterAcct?

- ✓ **Vendors** Allows you to manage your Vendors and potential Vendors and match them to buyers
- ✓ **Buyers** Allows you to track buyers and suggest properties to them.
- ✓ **Manages Websites** Including uploading listings, open times and sold properties.
- ✓ **Document Register** Link to drawings, specifications, and photos
- ✓ **Integrated** All of the above features are connected to the standard InterAcct accounting, payroll and other modules.
- ✓ **Flexible** Is this not an ideal fit to how you operate? Then InterAcct can personalize the software to make it a better fit to your way of thinking.





Real Estate Management

This is an example of a main menu for an agent, with just what is needed and nothing more.

Other Users / Managers might have more or less options depending on what they need to do.





Real Estate Flow Chart

'InterAcct allows you to manage your sales leads as well link this information through to your Accounts department'

Listings/Appraisals/Proposals:

Can be raised, tracked and followed up with this system. As well as updated online.

Buyers:

By source and open house history, buyers can be tracked in the software as well as matched to new listings.

Commissions:

There are many options here for how to split up the commissions based on who listed the property, closed the sale or managed the vendor.





Key Features & Advantages

	Feature :	Advantage :	Base ?
Multiple locations	Run multiple locations / branches from within the one system	Allows for better searching matching and data sharing within your group	Option
Security / Access Levels	Some data is available to all staff, other data only to the staff that has entered that information.	Security can be flexible to meet how your office wants to share information	Option
Own Main Menu	Each type of staff has their own main menu that gives them just what they want to see	Removes temptation to look for restricted data and has less clutter while using the software	Option
XML Web uploader	Upload your listings directly to a number of websites (RealEstate.com.au / Domain.com.au format)	Quicker than manually setting them up and more accurate.	Option
Update Open houses times	Open houses can be managed and scheduled in the system, then when confirmed, updated through to the web listings.	Quicker than manually setting them up and more accurate. Also gives you the option to be able to see who will be where, when.	Option
Listing Reports	Match Buyers to properties with simple easy reports.	When adding buyers you can find properties for them quickly. When adding vendors you can find buyers that might be interested.	Option
Integrated	One system for sales management, listings, accounting, CRM.	Less duplicated data, more features/functions.	Option

Appraisal Database:

- A Vendors can be grouped by location, type, region
- B We can have multiple agents involved in the sale.
- C We can track where this Vendor first found the vendor. (Open house, referrals, Online)

InterAcct TRAINING - [BUSINESS NAMES DATABASE - display]

File Record Edit View Go Advanced Menu Graph Design Help

1st Name: Joe

Surname: Jackson

Email: Shoeless@gmail.com

Mail Flags: 0488 556 613

2nd Contact Name: Jill

2nd Contact Name: Y

Mail Flags: 0488 556 614

Email: Uphill@gmail.com

Record Id: JACKJOHO

1st Added: 13-Aug-2015

Last Date:

Next Date:

Last Inv:

Listed:

Branch: HO

Agent: SVR

2nd Branch:

2nd Agent:

Type: F

Head Office

Individual

Ph Area: 02

Home Ph: 9788 4577

Fax No:

Bus Hrs:

Postal Address: 17 Anderson Ave

Suburb: HORNSBY

Country: NSW

P/C: 2077

Type: CLIENT

Category: 1.APPRAISE

Origin: 15.REFER

Location: 1.LOCAL

Cust Type: 2.RES-COUPLE

Region: NSW-SY-NTH

Budget \$K: 0

Exp Fees \$: 0

Job Status:

Comment:

WebCode:

Form help

Field help

Jobs

Accounting

Search

Tables

Messages

Suburbs

Reports

Tasks

This file contains details on your Clients, Prospects, Suppliers, and all other Business Contacts. Select record to view next menu options.

There is a separate file on Creditors.

Prospective Appraisal? Y

Buyer? N

Already Exists? N



Screen 2: Setup Property Appraisal

Basic details of the appraisal are entered in at the time we are first discussing the property with the potential vendor.

This is done before attending the site to complete a more complete appraisal.

Once the appraisal is done, then select Complete Appraisal to get to the next step.

InterAcct TRAINING - [CLIENT PROPERTY APPRAISALS - display , Jackson, Joe, 17 Anderson St]

File Record Edit View Go Advanced Menu Graph Design Help

Type: RESIDENT
 Follow Up: Mon 17-Aug-2015
 Category: SALES
 Classification: Residential Home
 Occupy?: OCCUPY
 Bedrooms: 3
 Bathrooms: 2
 Garages: 2
 Floor Area: 185 per squareMeter
 Land Area: 540.00 per squareMeter

Appraisal Id: 100878
 Date: 13-Aug-2015
 Agent: SVR
 Branch: HO
 Status: 0.PROSPECT
 Property Id: 903530

Last Sale \$: 650,000
 Last Date: 13-Apr-2005

List When?: 1-3 Months
 Prospect Status?: 1.HOT Hot Prospect

2nd Branch:
 2nd Agent:

Form help | Field help | Contact History

Edit Property Details
 Appraisal Name
 Message / Appointment
 Client Notes
 Record Contact
 Contact History
 Seller Check Report
 Complete Appraisal



Screen 3: Marketing Proposal

After the property has been inspected the details of what the vendor is expected are entered and we are able to create a marketing proposal.

Including :

- ✓ Photography
- ✓ Online Listings
- ✓ Print Media
- ✓ Auctioneers
- ✓ Stationary
- ✓ Signage
- ✓ Whatever else you wish to add

We can create any number of proposals that you need to for the one Vendor, then approve them when ready.

InterAcct TRAINING - [PROPERTY LISTING PROPOSAL - display, Jackson, Joe, 17 Anderson St, Joe Jackson, 17 Anderson St, HORNSBY]

File Record Edit View Go Advanced Menu Graph Design Help

Listing: 100509
 Quote Date: Mon 17-Aug-2015
 Exp Close: 23-Aug-2015
 Follow Up: Thu 20-Aug-2015
 Signed: [icon]

Quote No: 100014
 Branch: HO
 S/Person: SVR
 Status: 2.PROPOSAL

Menu:
 1. Proposal Lines
 2. Quote Clauses
 3. Print : Proposal

Listing Name: Joe Jackson, 17 Anderson St, HORNSBY

Cost Group - COST GROUPS

Group Id	Description	Role	Area	SubContract
1	AUCTION.AA	ADMIN	AUCTIONEER	JASANDTB
2	AUCTION.JJ	ADMIN	AUCTIONEER	JVAUCTMB
3	BRANDING	MKG	MEDIA	NEXPROMB
4	COLLATERAL	MKG	MEDIA	EXPPRJMB
5	COPYWRITER	MKG	COPYWRITE	JEMPEAMB
6	MISC	MKG	ZOTHER	NEXPROMB
7	ONLINE	MKG	MEDIA	
8	PHOTO.BRAD	MKG	PHOTO	PHOTOGMB
9	PHOTO.KEL	MKG	PHOTO	RAYWHIBU
10	PRINT.MWP	MKG	PRINT	MIYWEKMB
11	PRINT.OTH	MKG	PRINT	APNNAPBA
12	REA	MKG	MEDIA	REAGROVGB
13	SIGNAGE	MKG	SIGNAGE	ABCPHOMO

PROPOSAL LINES list, Jackson, Joe, 17 Anderson St, Joe Jackson, 17 Anderson St, HORNSBY

Cost Group	Cost Item	Description	Value -Inc \$
1	AUCTION.AA	Auction with Adam Anthony	475.00
2	COPYWRITER	Medium Property Copywriting	150.00
3	ONLINE	Premier Feature Upgrade 45 Day	4,083.00
4	PHOTO.KEL	Digitally Enhanced Photos	475.00
+	PRINT.MWP		

Cost Item - COST ITEMS

Cost Item Description	Phone	Mobile	Email	Notes	Rate \$
1	Eighth Page				300.00
2	Quarter Page				600.00
3	Half Page				1,200.00
4	Full Page				1,995.00
5	Double Page Spread				3,300.00
6	Package - Bronze				1,050.00
7	Package - Silver				2,100.00
8	Package - Gold				4,200.00
9	Package - Platinum				6,982.50
10	Package - Prestige Platinum				13,200.00
11	Agent Profile Eighth Page				150.00
12	Agent Profile Quarter Page				300.00
13	Agent Profile Half Page				600.00
14	Agent Profile Full Page				997.50
15	Agent Profile DPS Page				3,300.00



Screen 4: Marketing Proposal Printout

InterAcct Real Estate System
 PO Box 786
 Manly NSW
 Ph : (02) 9975 4653 Fax : (02) 9975 7269
 www.interacct.com.au



Marketing Proposal

Proposal For:
 Joe Jackson
 Jill Jackson
 17 Anderson Ave
 HORNSBY NSW 2077

Job No: 100509
Proposal Date: 17/08/2015
Customer Code: JACKJOHO
Your Contact: Simon Rainbow
Payment Terms:

Proposal Property Address:
 17 Anderson St

HORNSBY.NSW.2077

Description	Quantity	Rate \$	Total \$
Adam Anthony Auctioneers - Auction with Adam Anthony	1	475.00	475.00
Copywriting - Medium Property Copywriting	1	150.00	150.00
Online - Web Advertising - Premier Feature Upgrade 45 Day	1	4083.00	4083.00
Photo Kellyville Residential Photography - Digitally Enhanced Photos	1	475.00	475.00
Print Media - Metro Weekly Press - Half Page	1	1200.00	1200.00

Item Cost: \$	6,383.00
GST: \$	0.00
Total: \$	6,383.00

Follow up Diary.

These follow ups are listed in a diary and can be updated and checked off as they are completed.

InterAcct TRAINING - [CONTACT HISTORY - display , Joe Jackson, 17 Anderson St, HORNSBY]

File Record Edit View Go Advanced Menu Graph Design Help

+ - < > ↑ ↓ Home Print Mail Search Calendar Settings

This Activity - What Happened? Who was Contacted?

Date	Fri 14-Aug-2015	Action	CONTACT	1. Outgoing Phone Call
Employee	SVR	Simon Rainbow		
Contact	Joe Jackson			
This Action	Called to Confirm Joe Had Proposal, Left Message on Phone			

Next Activity - When/Who to Follow Up? Follow-Up Required? Y

Follow Up	Wed 19-Aug-2015	Next	CONTACT	1. Outgoing Phone Call
Employee	SVR			
Next Action	Call Again In A Few Days to Confirm Delivery			

Client Notes



Screen 6: Gatekeeping Form

Track Key Dates:

Once the proposal has been accepted by the client we are able to enter in the dates (when they are known) for this vendor sale.

InterAcct TRAINING - [GATEKEEPING FORM - display , Joe Jackson, 17 Anderson St, HORNSBY]

File Record Edit View Go Advanced Menu Graph Design Help

+ - < > ↑ ↓ Home Print Refresh Search Mail Calendar

Branch	HO	Head Office	Listing No	100509
Role/Task	GATEKEEP	GateKeeping	Client ID	JACKJOHO
Employee	KBALDWIN	Kate Baldwin	Property ID	903530

Listing Paperwork Approved	Wed 19-Aug-20
Pool Form Approval	Thu 13-Aug-20
VPA Proposal Signed	Wed 19-Aug-20
Have MWP Approved Payment Plan	Mon 17-Aug-20
Setup Listing Folders / Save Files	Wed 26-Aug-20
Are there Tenants in the Property?	☒ N
Tenant Paperwork Rec'd	
Send out Paperwork to Staff /Vendor	Wed 26-Aug-20
Blank Contact Prepared	Mon 31-Aug-20
Comments	

Gatekeeping Notes

Documents



Screen 7: Web Listing Setup

Type: RESIDENT
Category: SALES
Classification: AcreageSemi-Rural
Occupy?: OCCUPY
Commercial Listing Type:

Status: 0.PROSPECT
Updated Features?: Y
XML Status: current
Under Offer?: N
New Construction?: N
XML Authority: auction

Appraisal Id: 100878
Listing No: 100509
Original Upload:
Modified Upload:
Upload Revision: 0
Property Id: 903530
Agent Code: SVR
Department: HO
2nd Branch:
2nd Agent:
NonREA Branch A/c: FF
Domain A/c: FF
Unique REA ID:

Number of Images Posted: 3
Number of FloorPlans Posted: 0
Number of ExtLinks Posted: 0

Headline 1: Lovely 3 bedroom home in leafy suburbs
Headline 2: Ideal for growing families
Display Price \$: Offers Over \$850,000
Min Price \$: 750,000 Max Price \$: 925,000 Specific Price: 900000
Photo Positions: CENTRE
Own Website: http://www.InterAcctPropertygroup.com.au/QuickLinks/100509
Property Folder: \\SBS\InterAcct\IA\PROPERTIES\HORNSBY\17 Anderson St - (903530)
RealEstate.com.au A/c: FFSALES Frenchs Forest Sales
Display Address?: Y Display Price?: Y Display Suburb?: Y

Website: Documents Photos Copy Price Change

PROPERTY XML FEATURES, Joe Jackson, 17 Anderson St, HORNSBY, CENTRE
New Update Lookup Page Up Page Down Delete Function Design Help

	Feature	Yes/No/Qty	Notes
1	Indoor Features		
2	Alarm System	Y	
3	Intercom		
4	Ensuite		
5	Study		
6	Dishwasher	Y	
7	Built-In Wardrobes		
8	Ducted Vacuum System		
9	Gym		
10	Workshop		
11	Indoor SPA		
12	Rumpus Room	Y	
13	Floorboards		
14	Broadband Internet Available		
15	Pay TV Access		
16	Open Fireplace	Y	
17	Ducted Heating		
18	Ducted Cooling		
19	Split-System Heating		
20	Hydronic Heating		
21	Split System Air Conditioning		
22	Air Conditioning		
23	Gas Heating		
24	Evaporative Cooling		
25	Reverse Cycle Air Con		

Form help Field help

Menu

1. Property Features
2. Tour/360 View Links
3. Photo Images
4. Auction Date
5. Input Web Description
6. Export Out XML Feed

PHOTO IMAGES list, Joe Jackson, 17 Anderson St, HORNSBY, CENTRE

File Record Edit View Go Advanced Graph New Design Help

Seq No	Lookup Image	Date	Floor Plan Image?	RealEstate.com.au Saved Location
1	C:\Users\Simon.INTERACCT\Pictures\house 201405.png	14-Aug-15	N	
2	C:\Users\Public\Pictures\Sample Pictures\Desert.jpg	14-Aug-15	N	
3	C:\Users\Public\Pictures\Sample Pictures\Koala.jpg	14-Aug-15	N	

Lookup Image



Screen 8: Invoicing and Scheduling

Billing, Scheduling and more:

The InterAcct Real Estate System is not just for managing listings it also is an accounting system:

- ✓ Create invoices for advertising, commissions, sundry expenses
- ✓ Receipt money
- ✓ Update financial reports, Profit and Loss Balance Sheet, Business Activity Statements, Payroll and more

InterAcct TRAINING - [VENDOR PAID ADVERTISING - display, Joe Jackson, 17 Anderson St, HORNSBY]

File Record Edit View Go Advanced Menu Graph Design Help

+ - < > ↑ ↓ Home Print Copy Paste Find List Settings Calendar Refresh

Listing 100509

Photographer Needed? ☐ Y

Signage Needed? ☒ N

Copywriter Needed? ☐ Y

Print Media Needed? ☐ Y

Menu

1. Raise Invoice

2. Schedule Photographer

3. Schedule Copywriter

4. Advertising Schedule

5. Cost Variations

Date Signed 17-Aug-2015

Prop No 100014

Branch HO

S/Person SVR

Completed Date

INVOICES list, Joe Jackson, 17 Anderson St, HORNSBY

File Record Edit View Go Advanced Graph New Design Help

	Invoice Date	Inv Type ?	Exp Payment	Sales \$	GST \$	Invoice \$	Balance \$
1	14-Aug-15	M	15-Aug-15	5,802.73	580.27	6,383.00	0.00
				5,802.73	580.27	6,383.00	0.00



Screen 8: Buyer Reporting

Buyers list:

It is possible for the system to create a listing of properties that a buyer might be interested in (or which buyers might want a particular property) from within the system.

The report looks to see location, size, and price and compares those with what is desired. Larger properties are considered a better match than smaller, cheaper properties and better match than more expensive. These properties then display in the order of best match but will also show other close matches, with a percentage match.

InterAcct Real Estate System

PO Box 786

Manly NSW

Ph : (02) 9975 4653 Fax : (02) 9975 7269

www.interacct.com.au



Suggested Property Listings

Proposal For:

Jeff Richards

Jane Richards

12 Gray St

PARRAMATTA NSW 2123

Wanted ID:

100535

Proposal Date:

14/08/2015

Customer Code:

RICHJEP

Your Contact:

Simon Rainbow

Looking for						
Bedrooms	Bathrooms	Garages	Min Price \$	Max Price \$	Desired Suburb	Region
3	2	2	750,000	925,000	HORNSBY.NSW.2077	NSWSY-NTH

Close Matches :								
Match%	Suburb	Street Address	Bed	Bath	Cars	Price \$	Open Date/Time	
100.00	HORNSBY	17 Anderson St	3	2	2	Auction	By Appointment	
86.49	SHORTLAND	12 Shortland St	3	2	2	Listing Soon	By Appointment	



Screen 9: Buyer reporting direct HTML email.

Send

From ▾

simon@interacct.com.au

To...

☐ 'Jeffster@Jeffco.com.au'

Cc...

Bcc...

Subject

InterAcct Property Group Buyer Match Report

Hi Jeff & Jane,

Based on the information you have given us below, please find the current list of properties which match your criteria the closest.

Click on more details for more information/pictures about these properties.

Kind Regards,
Simon Rainbow

Your Search Criteria

Bedrooms	Bathrooms	Garages	Price \$	Desired Suburb	Region
3	2	2	925,000	HORNSBY NSW 2077	NSWSY-NTH

Top 20 Properties based on your Criteria





InterAcct Pricing (Per User)

Users	Base InterAcct	Job Costing, Estimating, Quoting (A)	Costing by Phase (B)	Building Repairs, Insurance Claims (C)
1	\$1,650 (15-25)	+ \$550 (10)	+ \$385 (5)	+ \$275 (2-3)
2-3	\$1,100 (20-30)	+ \$550 (10)	+ \$385 (5)	+ \$275 (2-3)
4	\$825 (20-30)	+ \$413 (10)	+ \$275 (5-8)	+ \$207 (2-3)
5-9	\$660 (25-35)	+ \$330 (10-15)	+ \$220 (5-8)	+ \$165 (3-5)
10-19	\$550 (30-40)	+ \$303 (10-15)	+ \$193 (5-8)	+ \$138 (3-5)
20-49	\$440 (40-60)	+ \$275 (10-15)	+ \$165 (10-15)	+ \$110 (3-5)
50+	\$385 (50-75)	+ \$253 (15-25)	+ \$143 (10-20)	+ \$99 (5-10)

Software Pricing

Software Pricing is per Computer Network "User" as defined in the above table. The optional software modules (e.g. Job Cost Estimating) require the Base InterAcct as well, and are purchased based on the number of base Network Users. Prices are all ex GST.

+ Annual Support Pricing

Yearly support is calculated at 20% of purchase price, with no CPI annual increases. Support is reduced by 30% after 3 years. For example a single User (with just the base InterAcct) would be $(\$1,650 \times 20\%) = \$330$

+ Implementation & Training Budget

The (Number) denotes the estimated min/max hours of Implementation & Training required in the budget per installation / module (not per User). Implementation / training "Advanced" is currently charged at the average rate of \$180 per hour.

Modules

There is a wide variety of software modules available for purchase, talk to InterAcct staff about your specific software needs.

Request a Cost Estimate:

InterAcct Software Pty Ltd

Toll Free: 1300 66 26 26

Email: sales@interacct.com.au

Web: <http://www.interacct.com.au>