

# REAL/Easy Version 17

BOS Online – Inbound Module

Overview of Key Features and Benefits

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Pull Listing and Sales Data into BOS from  
your online/internet applications.

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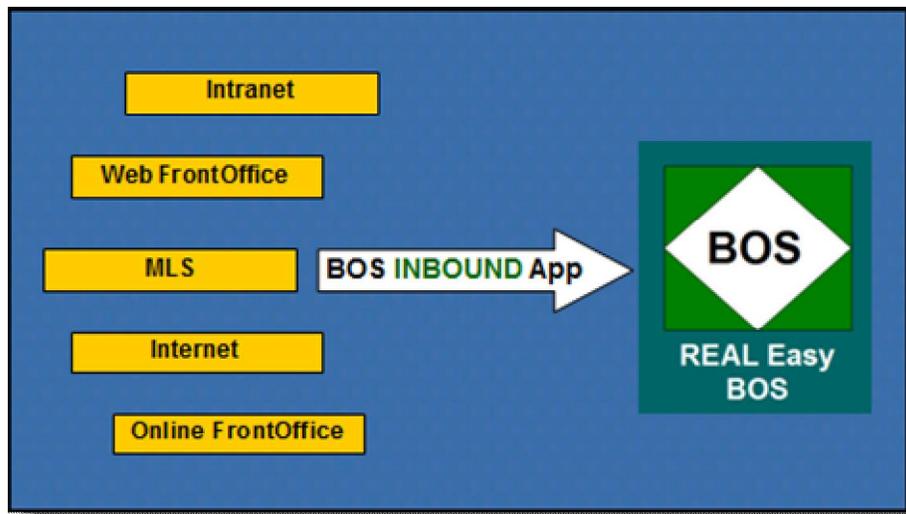
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## Welcome to the REAL/Easy Inbound App



Welcome to REAL/Easy management software and the Back Office System – BOS – special INBOUND app. INBOUND is designed to help the efficiency and accuracy of company staff by pulling key listing and/or sales data from your favorite web and front office systems.

Using the INBOUND app offers three key benefits:

1. It eliminates staff time to double enter listing and/or sales data into BOS that has already been entered in a 3<sup>rd</sup> party or company built front office system.
2. It enables your company to switch and utilize the best web based web application of your choice since INBOUND can adjust to pull from any front office application.
3. Key information from one or more online applications can be combined with all of the important BackOffice commission, production, and financial data enabling one central database for your company.

## **What Information can be Imported?**

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In general, you can represent information that can be pulled into BOS in two categories: Front Office / Listing data, and Back Office / Sales Transaction information.

Front Office/Listing data is found in brokerage public facing websites, in 3<sup>rd</sup> party or custom built listing coordination intranet applications, and in MLS systems. Front Office information that can be pulled into BOS with INBOUND can include:

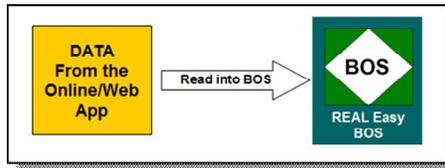
- Front Office Data—In/House and Market
- Listings—In/House and Other Companies
- MLS details
- Sales—In/House and Other Companies
- Leads and Agent Contacts
- Referrals
- Showings
- Listing Coordination Tasks
- Agent Activity and Information Reporting

Back Office / Sales Accepted Offer InHouse data is found in 3<sup>rd</sup> party online/web based transaction coordination/compliance systems and/or company build coordination and intranet/extranet systems. Back Office information that can be pulled into BOS with INBOUND can include:

- Accepted offer, pending, closed Sales transactions
- Transaction Coordination Tasks
- Escrow Trust Deposits/Activity
- Agent Production / Participation
- Buyer, Seller, and other “player” (mortgage, title, closing co) demographic information.

## How does the INBOUND App work?

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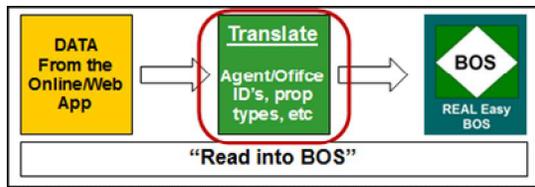
BOS's INBOUND app is part of the overall "Online" app/module in BOS. The application includes a number of separate programs which are used to pull data contained in from the online application into BOS.

Each web/online application has it's own proprietary data storage structure and methods to identify each data record using ID's such as Listing numbers, MLS numbers, transaction ID's, sales agent ID's.

BOS works the same way with its own database having different ID's that can be automatically assigned or assigned by the brokerage data entry personnel.

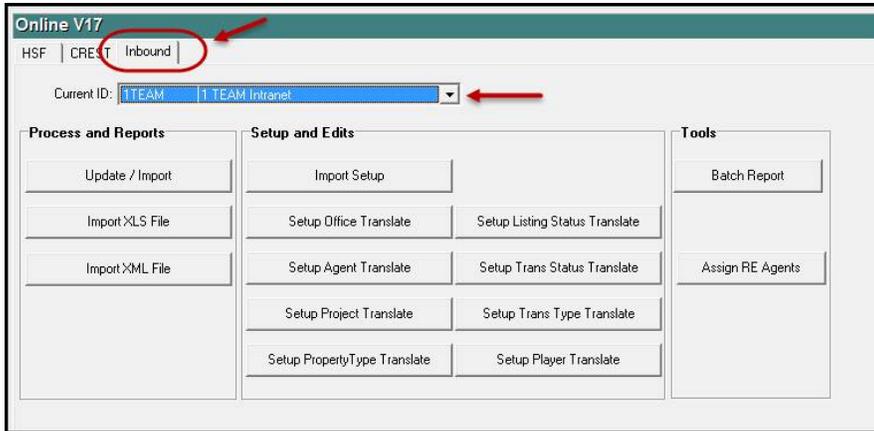
Most Online applications offer a method of sharing data with other systems either by creating "data feeds" or allowing the brokerage subscriber to run a "data extraction" program. If your Online application offers this capability then BOS's INBOUND app will be able to obtain data from it.

So the way the BOS INBOUND application works, i.e., imports and updates data from the online application, is to read the data supplied from time to time (e.g. daily or weekly) from that application and add or update the BOS database assigning the correct sales agents and branch offices and other items.



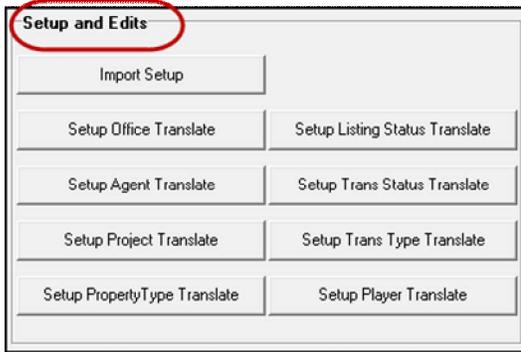
A key step that BOS INBOUND app has to do is to "Translate" the various ID's from the Online App's data into the correct ID's in BOS. For example within the Online's data may be list and sell side agent's participation records that are identified by the app's own agent ID's. In BOS, each agent has a different ID assigned to the same agent so BOS INBOUND app must "Translate" the Online agent ID into the BOS agent ID.

## Key BOS INBOUND Application Features



This section includes a brief description of the BOS INBOUND app features.

As shown above, the Online module of BOS includes the “InBound” application. The InBound app is designed to be able to pull data from one or more web/online programs. Each of these applications is assigned a “Current ID”, for example “1TEAM” as shown above.



A number of steps are needed to enable INBOUND to pull the desired data into BOS.

Within “**Setup and Edits**” the “**Import Setup**” is the first to be completed. This command will include settings such as:

- What is to be imported: Listings, Transactions, or both.
- Which listings and/or transactions are to be imported by starting listing/accepted offer date.
- Name and Location of the Web/Online application data format definitions (these are built by REAL/Easy).

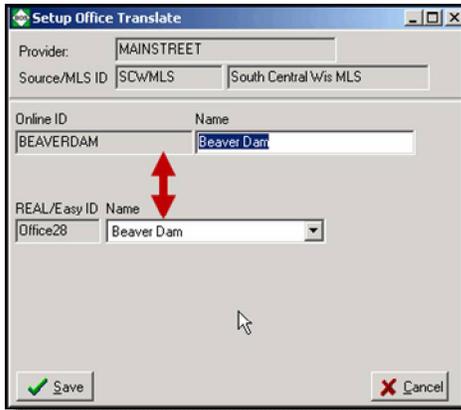
Next, depending upon what is being imported and the data content, the various translate tables must be setup.



The office translate “table” is entered that connects the branch office ID in the web program to the office ID in BOS.



Above is an example of a completed office translate table.



Above: is an Example of how the office Online ID from the web application is assigned to the correct BOS office ID. All of the required translate tables are setup in the same way. Often, an online app web vendor can supply a file of all office, agent and other IDs and names. If so, BOS can load them up into the translate table to save setup time.

How the translate tables are setup for other items is identical to the examples above. To save time, the online vendor is asked to provide if possible a list of the appropriate ID’s from their program.



The “Setup Agent Translate” table is required to identify listing and/or transaction agents from the web program to the same agent in BOS.

Setup Project Translate

BOS has the ability to tie listings and transactions to certain “projects” or developments. If the online/web program can do this as well then the “Setup Project Translate” table can be used to make sure these are assigned correctly in BOS.

(Note that in the case of projects there is the option to automatically create and assign BOS projects from new projects coming in from the web program in the project translate table making eliminating the need for manual maintenance).

Setup PropertyType Translate

If the web/mls program captures listing and/or transaction property types, these can also be setup to translate into the corresponding property types that you use in BOS.

Setup Listing Status Translate

If you are importing listings and the web/mls/online program provides the status of the listing records, the “Setup Listing Status Translate” table is built. Note that within this table the setup can include the option of ignoring certain listing status’ that you may not wish to import.

Setup Trans Status Translate

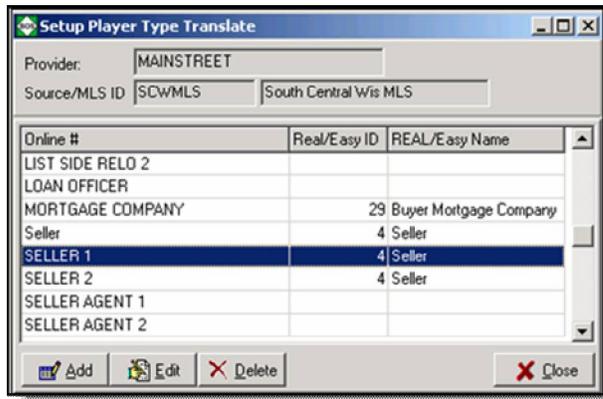
If you are importing sales transactions and the web program supplies the transaction status in its data, the “Setup Trans Status Translate” command is used to assign to the corresponding “BOS” status. Note also within this table setup there is the option to exclude importing certain transaction status’.

Setup Trans Type Translate

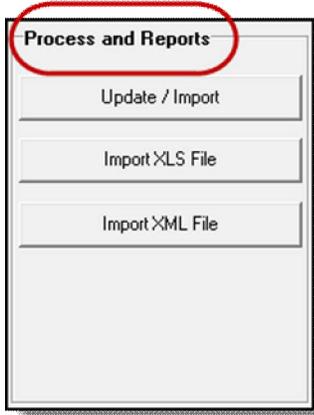
In BOS each transaction is assigned a “transaction type”. Examples can be an in-house sale “FL-FS” (our Firm list and Firm Sale) or “Lease”. If the web/transaction coordination program contains transaction type in its data then use the “Setup Trans Type Translate” to assign the corresponding BOS transaction type during Import.

Setup Player Translate

Some web/online programs enable you to keep track of all key what might be called “players”, buyers – sellers – title companies, within each listing and/or transaction record. If so, these can be setup to be imported into the correct BOS “Contact Type”.



Above is an example of how one may setup a player type to both assign the correct BOS contact type and exclude web player types you may not want to import.



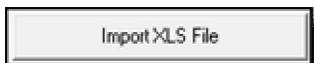
The BOS INBOUND app processes the data importing within the **“Process and Reports”** section. After all “Setup and Edits” steps are completed, and REAL/Easy personnel have completed the needed database structure definitions, INBOUND app is ready to import web/online app data as frequently as desired.



This command is used to manually import data from the web/online program into BOS. Each time the import is processed, BOS INBOUND creates a “log” that provides summary and other information of the process. Items like “number of listings / transactions added” are included in the log.

Note that the Update/Import command is used by a staff person in your company whenever needed. Often they wish to run “real time” just to be sure a day’s import was processed.

There is also an “automatic run” option to “Update/Import” that can be setup to run at certain times during the week or day that does not need an operator. This is setup for you by REAL/Easy support.



The “Import XLS File” command is a special import that is run interactively by administrative staff for brokerages who collect accepted offer transaction and/or listing information in MS Excel worksheets.

REAL/Easy staff and brokerage staff work together to define the cell locations in the worksheet (e.g. C25 is the list side agent #1 ID ) that correspond to the BOS needed demographic, agent, and contact information to be imported.

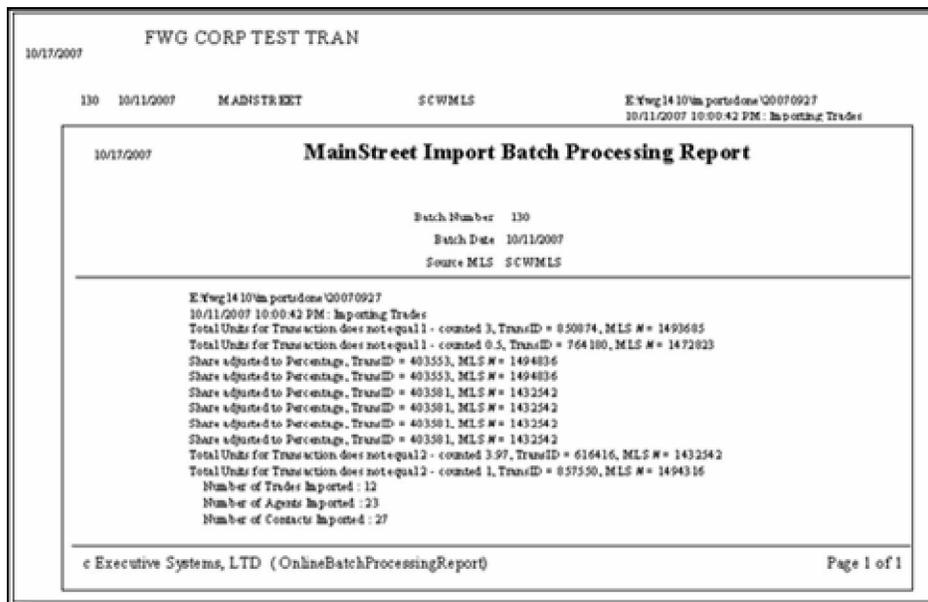


Some web/mls programs provide data in XML format. If so, this command is used to interactively import listing and or transaction data from these systems into BOS.

This import method can also be automated to run unattended at night or early mornings.



The Tools area command “Batch Report” enables staff to view and print a processing log from a selected date range of imports. The log provides counts of listing and/or transactions added or updated as well as other details regarding the import. Each import “run” is assigned a unique batch number that is also placed in the “Journal” tab of each listing and transaction record.



Above: sample log report for a Transaction import run.

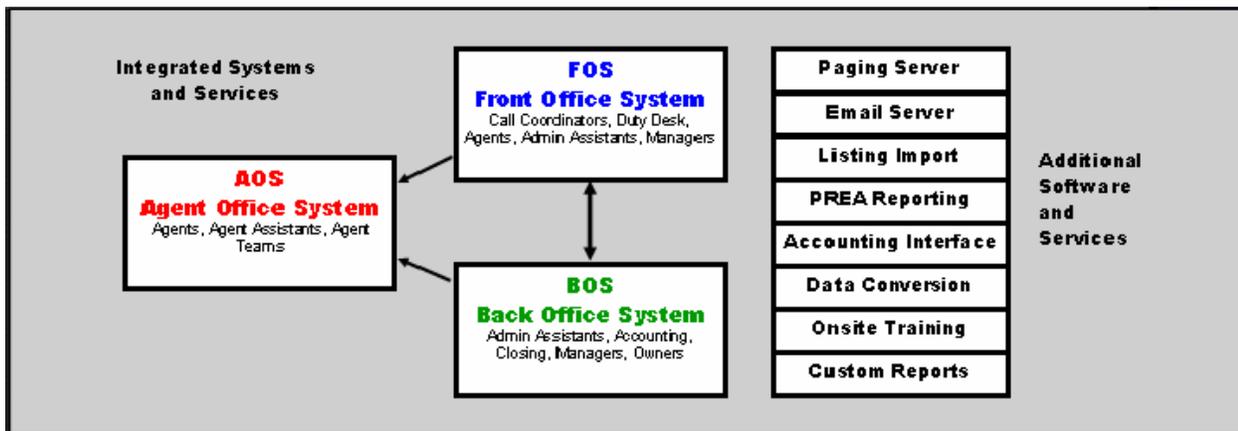
The “Assign RE Agents” is a tool that helps REAL/Easy and your admin staff setup the agent translate table.

Special Note: The INBOUND program is able to translate web/online agent ID’s into the BOS id’s during import, or optionally, add agents into BOS from the web/online agent records assigning the web app’s same agent ID’s.





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