



AGENT TRAINING

Office Policies and Procedures



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Introduction to San Jac Real Estate and the Broker

San Jac Real Estate was started in December 2007 as an innovative alternative to the "traditional" real estate agency. Our focus is on providing clients with an easy way to list, buy, sell, search and learn about real estate. Through our web site our clients and agents can access the tools they need to successfully complete any residential transaction in the Greater Houston Area.

Broker, Dave Turnquist, received his real estate license in 1999 and later his broker's license in 2005. Dave has previously worked with ERA Silver Star Realty and BayStar Real Estate as an agent, Broker Associate and as a Broker. A 1985 graduate of the University of Houston, Dave teaches real estate classes at San Jacinto College and is a former Director of the La Porte-Bayshore Chamber of Commerce, former President of the La Porte Main Street Association and currently serves on the City of La Porte TIRZ Board and La Porte Redevelopment Board.

For our clients the mission is simple: Provide fast, economical, convenient and consistent real estate services that focus on educating the client about the real estate process and getting them involved so that they can help us to do our jobs more efficiently.

For you as an agent there are simple guidelines and templates to follow that will help make your job much easier, more organized and more professional than ever before. By using the tools and procedures we have provided for you on our "Agent's Only" web page located at SanJacRealEstate.com/agentonly.htm, you will be able to conduct your real estate business from your house, your car, a Starbucks or anywhere you can receive an internet signal.



Required Contracts, Forms and Documentation

Whether you are joining us as a new agent or transferring from another agency, there are a few TREC and HAR transfer forms that must be completed and signed by Dave Turnquist and you. Click on the link on the AGENTS ONLY web page that says "Agent Transfer Forms" to download the forms you will need

When writing contracts, listing agreements, disclosures, amendments and addenda you must go to www.TexasRealtors.com and log in with your license # and password. From there you can access ZipForms Online. You are **REQUIRED** to use ZipForms Online to complete all of your docs. The reason for this is that the docs are saved on the server so that they can be accessed by you from any computer, anywhere in the world. The other reason is that ZipForms allows you to e-mail the docs directly to yourself, your client or anyone else, thus avoiding the need to fax the docs the first time.

Also located on the AGENTS ONLY web page are samples of many of the contracts and forms that you will use on a regular basis. Use the sample contracts as a guideline when writing contracts of your own. On the right hand side of the AGENTS ONLY page are all of the company forms that we require you to use for listings, at closings, sending faxes, etc. Click on each form and familiarize yourself with what is on it. It's a good idea to download these forms onto your computer's hard drive for future use (in case there is no internet access). Using these forms in this manner will show professionalism and consistency in service as well as help keep you organized and avoid mistakes in the process.



Required Use Of Services

As an agent with San Jac Real Estate you are required to provide certain services and to use specific companies for some of your activities.

SHOWING SERVICE: If you have a listing, you **MUST** use Centralized Showing Service Inc. (Showings.com) to schedule all of the appointments for showings. Agents are **NOT PERMITTED** to use their own phone number as the appointment number and to schedule their own appointments for showings on their listings. CSS charges \$30-\$40 per listing to provide this service, but it is worth every penny to ensure all calls are answered and no appointments are missed, plus they provide e-mail and online feedback for you and your clients to see what other agents had to say.

VIRTUAL TOUR: You **MUST** use a Virtual Tour on any listings that are not discounted listings (6%) and encourages you to use them on all listings. There are many companies that provide this service. Some of them will take the photos for you and do the virtual tour, while others allow you to upload your own photos and set up the virtual tour yourself. I use VisualTour.com and they charge a flat fee of \$29.95 per month for unlimited virtual tours. All you need is a good digital camera and a some patience when learning how to use the software program (they have online tutorials).

RECORDED MESSAGES: You **MUST** use a Talking House (TalkingHouse.com) radio transmitter or a 1-800 recorded voice mail number on all non discounted listings (6%) so that buyers can listen to a pre-recorded message about the house when they are sitting in their car out in front of the house. This is a great tool for when the flyer box is empty and will also make your phone ring with new buyers or provide you with call capture.



Required Skills

COMPUTER SKILLS: You **must** be able to use a computer and have advanced skills in Microsoft WORD, internet browsing and searching, hooking up printers, installing software, using external hard drives or stick drives, burning CD's, setting up folders, etc.

DIGITAL CAMERA SKILLS: You **must** own and know how to use a decent digital camera and be able to adjust the settings for photo size, light, etc. You **must** also be able to upload the photos to your computer and be able to edit, crop and resize them using photo editing software such as Adobe Photoshop or a comparable software program. You must know how to upload the photos to specific folders and how to add new folders and transfer files.

SCANNING DOCUMENTS: You **must** have a multi page capable scanner and know how to scan contracts and addenda and be able to convert them to .PDF format so they can be emailed and stored electronically. If you do not have software that can convert TIFF scans into .PDF documents, you will need to purchase one. It is not necessary to purchase the expensive Adobe software for this. There are cheap versions available at Best Buy and Office Depot as well as online. I use deskPDF Professional from docudesk.com and it is \$29.95 and can be downloaded online. It allows me to scan multiple pages and then choose PRINT, but instead of actually printing the docs I choose deskPDF as the printer and it then converts them all into one .pdf file.

WEB SITES: You **must** publish your free HAR.com agent website by logging into HAR.com with your Public ID and password. If you know a little about web building and want to have other websites, that is great too



Required Equipment

You **MUST** have the following equipment as an agent with San Jac Real Estate

- 1) A SUPRA Key or SUPRA e-key
- 2) A Cell Phone with plenty of airtime
- 3) Your own fax machine or fax to email number
- 4) A Talking House radio transmitter or a 1-800 recorded voice mail number
- 5) Membership with Centralized Showing Service
- 6) Membership with a Virtual Tour service
- 7) A decent digital camera that you know how to use
- 8) A computer (preferably a laptop) with high speed internet connection
- 9) A Multi-Page Scanner (you can combine the multi-page scanner and the fax)
- 10) A working email address



Required Procedures

LISTINGS: When taking a listing you must use the following forms (located on the AGENTS ONLY web page) in addition to the necessary TAR contracts. 1) Listing Checklist 2) Listing Data Sheet 3) Market Value Pyramid and 4) Closing Checklist. After all contracts, addenda and forms have been completed and executed, you must scan all of them, save them as .pdf files, and email them to Dave Turnquist (Broker) so that he can have them on file in case there is a problem or we are audited. Dave will not sign the commission disbursement form for you until he has received the docs listed above as .pdf files. The title company will not release the commission to you without the commission disbursement form signed by the broker.

BUYERS: When working with buyers the same procedure as above holds true for all TAR contracts and addenda in addition to the "Closing Checklist" and any "Rebate Disclosure"

Be sure to provide a "Closing Cost Estimate" for your buyer or seller client using the one provided for you on ZipForms # 1935 and #1936

COMPANY SIGNS/CARDS/ADVERTISING: You must use the approved company logo on all business cards, yard signs, door magnets, and advertising. I will provide you with your first 1000 business cards. I will also provide yard signs, however if they are damaged or stolen, you will have to pay the \$50 replacement fee. If you want to have your own signs made, the broker must approve the design first. You will also need some riders with your name and phone number and some car door magnets (CouplandSigns.com)



TEST (100% Correct Required to Pass)

Office Policies and Procedures

NAME _____ DATE _____

- 1) When taking a listing, our agents should always use their cell number, home phone number or our main office number as the appointment number for other agents to call and set up showings. TRUE FALSE
- 2) When preparing contracts and addenda, our policy is that it is always best to handwrite the contract instead of using ZipForms online. TRUE FALSE
- 3) San Jac Real Estate requires our agents to use a Visual Tour on all non discounted (6%) listings and encourages them to be used on all listings. TRUE FALSE
- 4) All San Jac Real Estate company forms and logos that are required for use can be found at the AGENT FORMS and LOGOS web page located at SanJacRealEstate.com/agentformsandlogos.htm TRUE FALSE
- 5) Listing Checklist, Listing Data Sheet, Market Value Pyramid and Closing Checklist are 4 of the company forms you are required to use on every residential listing. TRUE FALSE
- 6) A multi-page scanner, cell phone with plenty of minutes, digital camera and a Supra Key are 4 of the items that all San Jac Real Estate agents are required to have. TRUE FALSE
- 7) San Jac Real Estate requires all of its agents to be able scan and send all of their docs via email as .TIFF or .JPG files. TRUE FALSE
