Introductions & Agenda

Today's Agenda

Topic = Agent Organization

- **Cloud Storage Solutions**
- **File Naming Conventions**
- **Organization**
- **Processing**
- **Tech Tips**
- **Q & A**

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BUCKS COUNTY ASSOCIATION of REALTORS®

Cloud Storage Options

A. Dropbox

    i.   **Accessible from all devices**

    ii. **Ability to scan documents into PDF files remotely (mobile devices and tablets) [detailed later]**
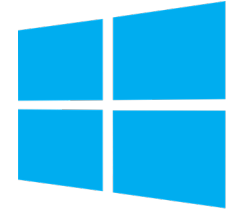
    iii. **Share files via link [detailed later]**

B. iCloud Drive

    i.   **Best for Mac Users**

    ii. **Accessible from Apple Devices**

    iii. **Ability to scan documents into PDF files remotely (iPhone and iPad)**

C. OneDrive

    i.   **Best for Windows Users**

    ii. **Compatible with Office Suite**

D. Best of the Rest

    i.   **iDrive**

    ii. **Box**

    iii. **Google Drive**

Now that you have a place to put it, how best to name it?

First off, you need a naming convention...

A File Naming Convention (FNC) is a framework for naming your files in a way that <u>describes what they contain and how they relate to other files</u>.

Developing an FNC is done through identifying the key elements of the project, the important differences in files, or commonalities between your files.

What's the Best?

Simply put... The one that **YOU** remember!

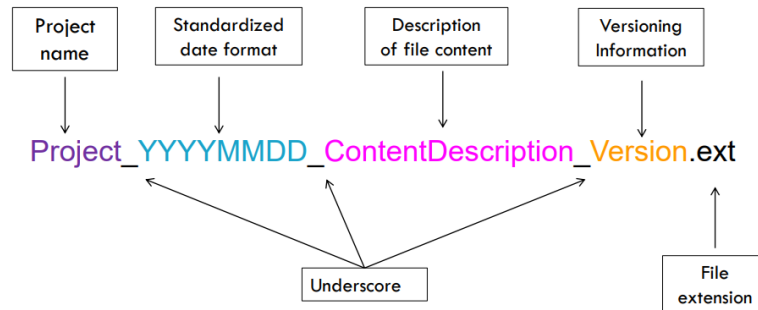...or better yet, the one you can search for 2 years from now.
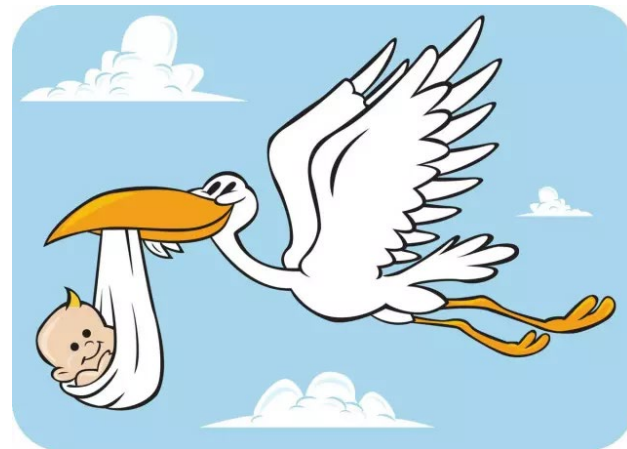
The Key: Consistency & Discipline (...even in a hurry)

The diagram on the right represents a "classic" naming structure. It likely would be used with projects that require multiple iterations or have a variety of content related to the same "Project". This makes it easy to "see" at a glance or find this file in a search.

In addition, some companies require specific naming conventions because files are "**shared**" internally (giving others a way to find or search for a file), or downstream applications require it (i.e. databases).

NOTE: FNC's are very subjective. It doesn't really matter how you name it (...barring some illegal characters) as long as you consistency do it every time, otherwise, your "system" will break down.

The reason we called this session "BOOT CAMP" is to, err.., instill a little discipline in order to avoid this... (next slide...)

Project name | Standardized date format | Description of file content | Versioning Information

Project_YYYYMMDD_ContentDescription_Version.ext

Underscore

File extension

File Naming Conventions

A HOT MESS!

Look, I get it… Your busy. "I just need to get this out. I'll just put it on the desktop for NOW". However, when you do this, remember:

- It's on your desktop and not "in the cloud". Therefore, you can't access this file if you're on the road. You'll physically need your computer again to see it, edit it, resend it, or print it.
- An AOS (Agreement of Sale) from Zipforms saves as: *standard_agreement_for_the_sale_of_real_estate__720_ts73798.* … so, if you can find this file on your desktop, then well, you're just a better person.
- Maybe you backup your computer or maybe you don't… but if your laptop melts before your eyes, said file may melt with it.
- If you don't name it properly, it's extremely EASY to send someone the wrong file, or… you likely have to "open it" first to check.

Ok, give me a practical solution…

File Naming Conventions

Breaking it down

Good FNC's use a hierarchy or organizing principle based on 3 parts.
The first part of a file name is the <u>most significant</u> because it's what you see first.

If you create, save or track files that are date sensitive, you may want to lead off with a date. Use this format: YYYY-MM-DD, as it helps with sorting later, **2022-07-19**_xxx_xxx.pdf

The 2nd part of the file name is a "subject" or "descriptor" that tells you what the file is. It can be a name, location, or type. 2022-07-19_**331_W_Bridge**_xxx.pdf...tells me at a glance that this file is related to 331 W Bridge, created July 19, 2022

The last part is a "code", file status, or version. Realtors use codes all the time, related to the forms we use. So, 2022-07-19_HSimpson_331_W_Bridge_**AOS**.pdf. makes sense to us. It's an Agreement of Sale for Homer, 331 W Bridge created July 19th, 2022. You could even add status, xxx_AOS_DRAFT.pdf, or AOS_v2.pdf

Finally, <u>no one said</u> these "parts" have to be in a specific order, so my brain likes this: **FE_AOS_HSimpson_331_W_Bridge.pdf** - we tells me this is a "fully executed" Agreement of Sale for Homer, concerning 331 W Bridge.
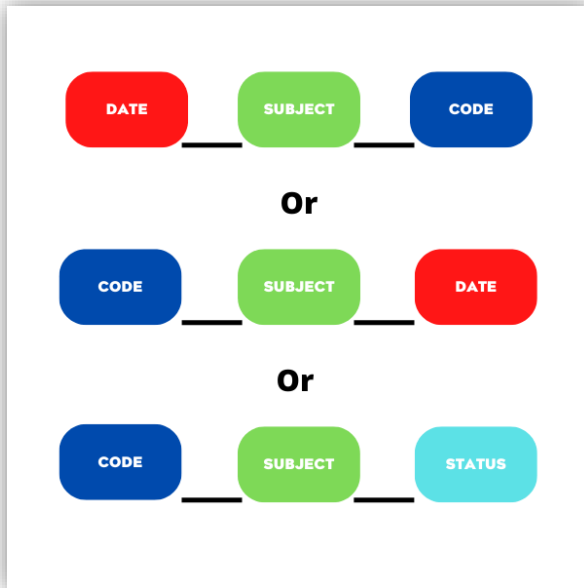
File Naming Conventions

Give me a hack for this… OK, how about MLS?

Realtors have ~3 types of property sheets we <u>routinely</u> save or email to clients. Just copy the property address (Ctrl-C), hit SAVE, select a folder, and do this:

1. **CV**_331_W_Bridge_St_Morrisville.pdf - for Client View
2. **AV**_331_W_Bridge_St_Morrisville.pdf - for Agent View
3. **SD**_331_W_Bridge_St_Morrisville.pdf - for Seller Disclosures

Q: Is it a pain to copy, paste and take out the spaces and zip code?

A: Yes, but it's accurate every time! Plus, once the first one is saved, you can save the next two by clicking on the previous file name (that copies it…) and then just change CV to AV, or CV to SD. Subsequently, if you search for this file six months from now, just put in "331" and you'll likely get 3 files to choose from.

Finally, you don't have to stop there:
- ❑ **AOS**_331_W_Bridge_St_Morrisville.pdf
- ❑ **PARA**_331_W_Bridge_St_Morrisville.pdf
- ❑ **BFI**_331_W_Bridge_St_Morrisville.pdf
- ❑ **LPD**_331_W_Bridge_St_Morrisville.pdf

Side Hacks:
Get a program or mouse that saves your "clipboard", (copy and pastes'). Subsequently, if you copy an address, you can use it over and over again without returning to the source.

If you're going out to show a property, print the AV and SD in B&W and the CV in color, double sided. This saves paper, ink, and helps with distribution. Just give the client the one in COLOR. Nice…

File Naming Conventions

Characters to Avoid in Filenames

Your files may be viewed by numerous users who use a wide variety of operating systems (Mac, PC, Chromebooks) and devices (Desktops, Tablets, and Smartphones). It's good practice to play it safe.

While not an full comprehensive list, avoid these:

#, %, &, { , }, \, $, !, ', ", ;, :, @, < , >, *, ?, /, |, +, `, =

In addition, some characters may work on "your machine", but not the person or system you're trying to communicate with. A good example is "blank spaces", as in… AOS Simpson 331 W Bridge St Morrisville.pdf - It may work, but there's nothing worse than having to resend because they can't open it. Best to avoid in general, Use a hyphen - , or _ to separate characters and make them easy to read.

Tips:
- Don't start or end your filename with a space, period, hyphen, or underline.
- Keep your filenames to a reasonable length, less than 31 characters.
- Use different formats at different stages. Drafts should have version numbers (_v3.pdf), while fully executed agreements should have a date.

Bad filenames:
- ❏   F&A Costs.html
- ❏   my PDF file#name.pdf
- ❏   Falls Down"4/22/2014.mov

Good filenames:
- ❏   AOS_Simpson_2022-07-19.pdf
- ❏   071922_Simpson_PARA.pdf
- ❏   RL_SimpsonBurns_DRAFT.pdf
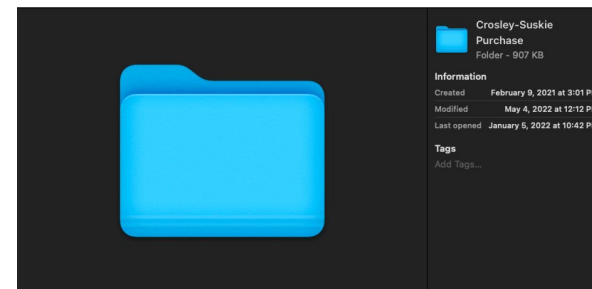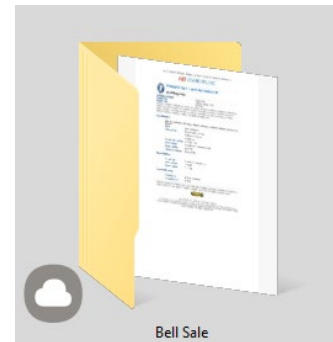
Organization

A. **Client Folder**

   i. **Overarching folder with everything client related contained here**

B. **Agency Folder (Listing/Buyer Agency)**

   i. **This folder should contain all the relevant listing/buyer agency documents**

C. **Property/Offer Folder**

   i. **This folder should contain all the relevant offer documents whether buying or selling.**

      1. *Selling*

      2. *Buying*

Bell Sale

Crosley-Suskie Purchase
Folder - 907 KB

Information
Created   February 9, 2021 at 3:01 PM
Modified   May 4, 2022 at 12:12 PM
Last opened   January 5, 2022 at 10:42 PM

Tags
Add Tags...

Organization – Agency Folder

A. Listing

    i. **Consumer Notice (CN)**

    ii. **Listing Contract**

    iii. **Any Relevant Addendums**

    iv. **Seller Property Disclosure (SPD) [if applicable]**

    v. **Lead Paint Disclosure (LPD) [if applicable]**

    vi. **Initial Seller Net Sheet (SNS)**

    vii. **Photos**

B. Buyer/Tenant Agency

    i. **Consumer Notice**

    ii. **Buyer Agency Contract**

    iii. **Any Relevant Addendums**

    iv. **BFI**

    v. **PreApproval**

    vi. **Proof of Funds**

Organization – Sell Side

a. *Offer Stage*
    i. **MLS Listing**
    ii. **BFI**
    iii. **Buyers Estimated Closing Costs (BCC)**
    iv. **Deposit Money Notice (DMN)**
    v. **SPD**
    vi. **LPD**
    vii. **PreApproval/Proof of Funds**
    viii. **Agreement of Sale (AOS)**
    ix. **Agreement of Sale Addendums**
        1. Price Escalation Addendum
        2. Appraisal Contingency Addendum
    x. **Cooperating Broker Compensation (CBC)**
    xi. **Deposit Check**

b. *Processing Stage*
    i. **Title Report**
    ii. **Inspection Documents**
        1. Reply to Inspections
        2. Change in Terms Addendum
    iii. **Mortgage Commitment**
    iv. **Settlement Notice**

c. *Conveyancing*
    i. **Tax Certs**
    ii. **Municipal Certs (U&O)**
    iii. **Water/Sewer Cert**
    iv. **Mortgage Payoff**
    v. **HOA/COA Resale Documents**

d. *Closing Stage*
    i. **ALTA**
    ii. **CD**
    iii. **Marked Up Title Report**

Organization – Buy Side

a. *Offer Stage*
   i. **MLS Listing**
   ii. **BFI**
   iii. **Buyers Estimated Closing Costs (BCC)**
   iv. **Deposit Money Notice (DMN)**
   v. **SPD**
   vi. **LPD**
   vii. **PreApproval/Proof of Funds**
   viii. **Agreement of Sale (AOS)**
   ix. **Agreement of Sale Addendums**
       1. Price Escalation Addendum
       2. Appraisal Contingency Addendum
   x. **Cooperating Broker Compensation (CBC)**
   xi. **Deposit Check**

b. *Processing Stage*
   i. **Title Report**
   ii. **Inspection Documents**
       1. Reply to Inspections
       2. Change in Terms Addendum
   iii. **HOA/COA Documents**
   iv. **Mortgage Commitment**
   v. **Settlement Notice**

c. *Closing Stage*
   i. **ALTA**
   ii. **CD**
   iii. **Marked Up Title Report**

General Processing

A. **Checklists**

    i. **Buying**

    ii. **Selling**

B. **Presentation of Offers Document**

C. **Technology Tips**

    i. **Password Manager**

        1. *Dashlane*

        2. *iCloud Keychain*

        3. *Dropbox Passwords*

        4. *LastPass*

        5. *1Password*

D. **Mobile Scanning**

E. **Attaching Files**

    i. **Adobe App**

F. **Sharing File Folders (Dropbox)**

G. **Print – Save as PDF (Bright MLS Example)**

H. **Security Issues**

Questions?

Housekeeping:
In case you arrived at half-time, a link to this presentation will be sent to all participants.

If you'd like to reach us?

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