



Fundamentals of Real Estate Working with Today's Technology

Joel Kahn, CCIM

Calkain Institutional Advisors

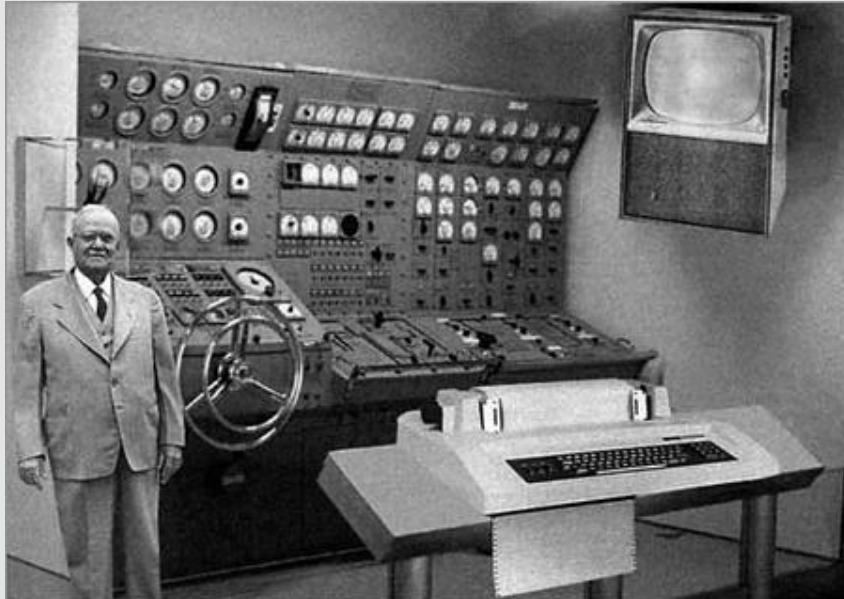


Topics

- › Mobility of Data
- › Synchronization vs. Backup
- › Virtual Private Network vs. Remote Desktop
- › Working with Electronic Files
- › Customer Relations Management Programs
- › Analytical Programs



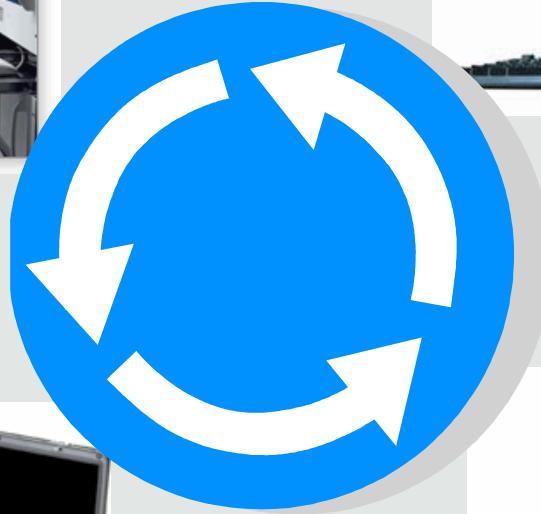
It's only been a few years since...



Mobility of Data



Mobility of Data



Mobility of Data

The screenshot illustrates the mobility of data across different Microsoft Office applications:

- Microsoft Word:** A document window titled "Untitled - Message (Plain Text)" is open. It contains the text "This is an Example" repeated multiple times. The "To:" field is set to "john.citizen@qed.qld.gov.au".
- Microsoft Excel:** An Excel spreadsheet titled "Book1" is displayed. It shows a "Quarterly Statistics" table with various financial figures for Product Cost, Sales Revenue, Costs, and Profit. The table includes columns for Q1, Q2, Q3, Q4, and Total.
- Microsoft Outlook:** An email message window is shown. The subject is "Feedback from Moreton Bay Wetlands page". The body of the email also contains the text "This is an Example" repeated multiple times.



So where is the data located...

- › My Documents = C:\Documents and Settings\Joel Kahn\My Documents
- › Outlook = C:\Documents and Settings\Joel Kahn\Local Settings\Application Data\Microsoft\Outlook
- › Programs = C:\Program Files



How can it be different?

- › Centralize Outlook by Moving Outlook to the My Document folder for easy Backup and Synchronization
- › For Mobile Users who also use a Desktop - map the Outlook file in the Desktop to the Outlook folder in the Laptop



Backup vs. Synchronization

- › A "Synchronization" will potentially copy files in either direction, while a "Backup" always copies files in one direction.
- › In a synchronization, the file modification times of files in each folder are compared and the newer file is copied to replace the older file, regardless of the location of the older file.
- › In a backup, files are always copied in the direction of the arrow.



Backup vs. Synchronization

Backup Options

› Online Services

- SOS
- Mozy
- @ Backup
- IBackup

› Desktop Solutions

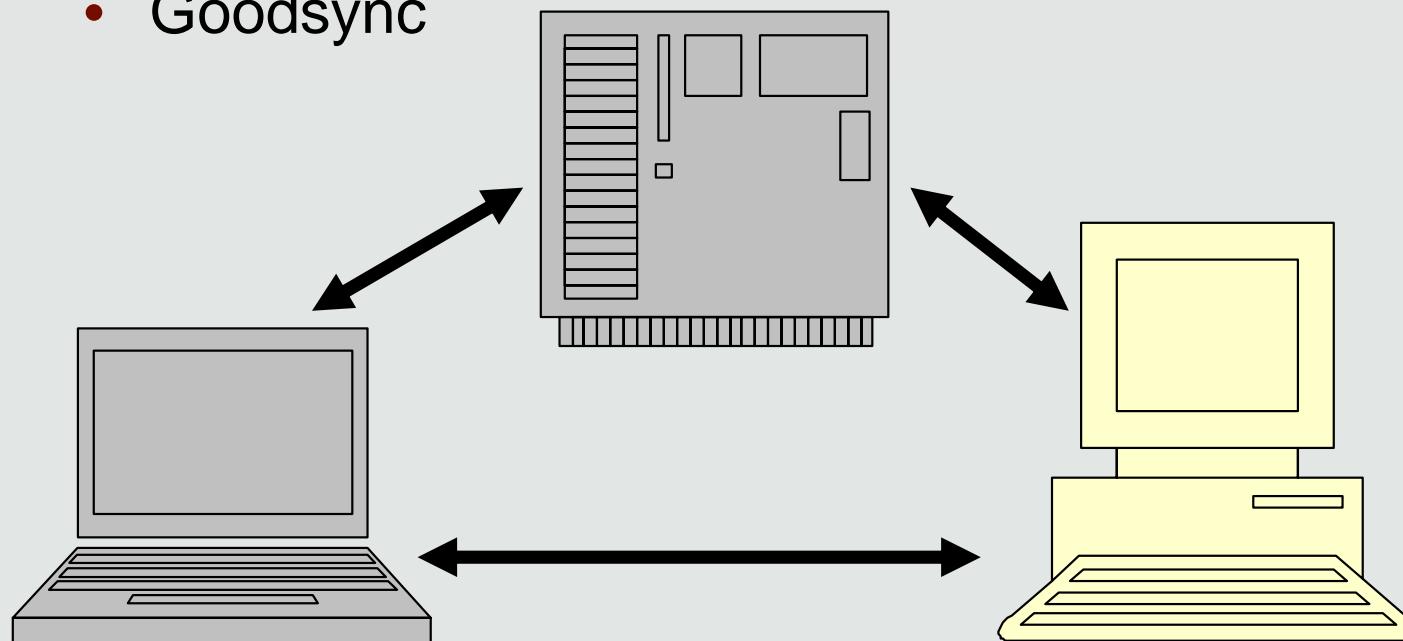
- Genie Software
- Acronis True Image
- Symantec
- NTI Backup



Backup vs. Synchronization

➤ Sychronization

- Powersync by Linkpro
- Microsoft Active Sync 4.2
- Goodsync



Virtual Private Network vs. Remote Desktop

Why is some form of remote access important?

- › Telecommuting Work on your PC remotely
- › Mobile Work Access and use your PC from hotels, airports, satellite offices, Internet cafés or from anywhere in the world with Web access.
- › Collaboration
- › Remote Administration Reboot or fix your server after hours or while traveling or even fix your PC by IT Staff remotely



Virtual Private Network vs. Remote Desktop

- › Remote Desktop Protocol (RDP) is a multi-channel protocol that allows a user to connect to a computer running Microsoft Terminal Services.
 - RDP allows you to connect to your work computer (with or without programs running, from home and have access to all of your applications, files, and network resources as though you were in front of your computer at work.
 - RDP allows many IT departments worldwide to bring their applications to a single server.



Virtual Private Network vs. Remote Desktop

- › Virtual private network (VPN) is a private communications network often used within a company, or by several different companies or organizations, to communicate confidentially over a publicly accessible network.
 - Sensitive data is hidden from Internet users, but made securely accessible to appropriate users through a VPN.
 - Many VPN client programs can be configured to require that all IP traffic must pass through the tunnel while the VPN is active, for better security.



Virtual Private Network vs. Remote Desktop

Is there an Advantage?

- › Security is generally equivalent for both methods
- › The Remote Desktop can utilize a significant greater amount of bandwidth
- › Thick client software, where the software was built to be on a LAN with high-speed connections, operates better over a Remote Desktop Connection, which only has to transfer the screen updates to the remote user -- not large file transfers.



Working with Electronic Files

Tips for Managing Your Files

- › Use My Documents
- › Adopt consistent methods for file and folder naming
- › Keep names short
- › Separate ongoing and finished work
- › Avoid big folder structure
- › Use shortcut links for multiple copies
- › Organize files by date



Working with Electronic Files

Emailing Adobe vs. Word/Excel

Adobe utilizes Portable Document Format (PDF) which is a universal file format that preserves the fonts, images, and layout of source documents created on a wide range of applications and platforms. Adobe PDF files are compact and complete, and can be shared, viewed, and printed by anyone with the Acrobat or free Adobe Reader software.



Working with Electronic Files

Here are a few advantages of Adobe PDF:

- › Anyone, anywhere can open a PDF file including on a mobile device. All that is needed is the free Adobe Reader software.
- › PDF files are compact and searchable.
- › Interactive hyperlinks make PDF files easy to navigate.
- › PDF documents may have special access rights applied, allowing you to fill in forms, sign documents, participate in online document reviews, and attach PDF and non-PDF files to a PDF document.



Working with Electronic Files

Zip Files

- › The advantages of using the zip file format is to archive several files into a single compressed file and to minimize its size for faster download times. It also helps to ensure files do not get separated. Once a zip file is downloaded, the file or files within it can be extracted and used normally.
- › Zip vs. RAR – Minimum difference



Customer Relations Management Programs

“Customer relationship management (CRM) encompasses the capabilities, methodologies, and technologies that support an enterprise in managing customer relationships. The general purpose of CRM is to enable organizations to better manage their customers through the introduction of reliable systems, processes and procedures.”



Customer Relations Management Programs

Application architecture of CRM:

- › Operational - automation to the basic business processes (marketing, sales, service)
- › Analytical - support to analyze customer behavior, implements business intelligence alike technology
- › Collaborative - ensures the contact with customers (phone, email, fax, web, sms, post, in person)



Customer Relations Management Programs

Most Popular Programs

- › Outlook
- › Act
- › Goldmine
- › Salesforce.com



Customer Relations Management Programs

Key Steps in Implementing a Successful Solution

- › Make sure that every User finds an advantage to using the system.
- › Organize your existing data.
- › Install your CRM software and customize it with regard to any additional fields and Reports you need.
- › Set up your organizational structure with Business Units, Roles, and Teams.
- › Import all the data and train your Users almost simultaneously.
- › Don't take your eye off your data.
- › Plan to continually improve the system.



Customer Relations Management Programs

Buying Tips...

- › Application integration
- › Import and export features
- › Mobile connectivity
- › Robust reporting
- › User interface
- › Remotely vs. locally hosted software
- › Technical support costs



Analytical Programs

Should you use:

- › PlanEase
- › Argus Software
- › REIWise
- › On Target
- › Real Estate Investment Analysis

Or is it better to rely upon:

- › Excel





Thank you!

