

**REAL ESTATE LAW
PRACTICE AREA TEMPLATE**
for Time Matters[®]/Total Practice Advantage[®]

By
IP ASSOCIATES, LLC

Why do *you* need a Practice Template?

- *Tired of using the one size fits all setup that shipped with Time Matters?*
- *Frustrated that Time Matters isn't as easy to use as you expected?*
- *Concerned that a custom-tailored Time Matters configuration is too expensive and/or time consuming?*
- *Too busy practicing law to worry about designing and customizing software?*

REAL ESTATE FORM

Primary Tab

The Primary tab contains most of the key information about the matter. Easily keep track of the current stage of the matter, key contacts related to the matter via single-click lookups, key dates, referral source, and property information.

The screenshot shows the 'Matter Form - Change' application window. The 'Primary' tab is selected, displaying a form with the following data:

MatterRef	Abrams, Saul RE Buy from Lee, Jay			Code	/RE.BUY/
MatterNo		County		Staff	
Stage	Negotiations			Update Dt	4/15/2008
Client	Saul Abrams			Notify	<input type="checkbox"/>
Client Contact	Molly Sue Sims			Trigger	<input type="checkbox"/>
Pri Contact	Buyer			Review	<input type="checkbox"/>
Buy / Sell	4666 Raleigh Road			Billable	<input type="checkbox"/>
Address	Atlanta, GA 30041			Private	<input type="checkbox"/>
Address 2	770.555.6412			Status	Open
City	GA	30041			
Tel/Fax					
QuickFlow System	Common				
Docs Prep					
Cast					
Events, TDs					
Checklists					
Key Dates Info	Offer	2/25/2008	Acceptance	2/26/2008	
	Mort Conting		Atty Approvl		
	Inspection		CI Dat Loc		
Key Contacts	Oth Party	Stacey Miller	Oth Atty	Debra Mackenzie	
	Our Agent	Brian Williams	Their Agent	Theodore Boland	
	List Agent		Lndr TitCo	Samuel P. Branch	
	Area 5				
	Docs Folder	Abrams, Saul RE Buy Oct 07			
	Ref Src	Word of Mouth	Ref By	Alex Hemmingway	
	Other Details	PIN #	5542		
		PIN #2			
	Price/Escrov		Earnest		

REAL ESTATE FORM

Secondary Tab

The screenshot shows a software window titled "Matter Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar. The "Secondary" tab is selected, showing a form with the following fields:

- MatterRef: **Abrams, Saul RE Buy from Lee, Jay**
- Code: **/RE.BUY/**
- MatterNo: [Empty]
- County: [Empty]
- Staff: [Empty]
- Stage: **Negotiations**
- Update Dt: **4/15/2008**
- Client: **Saul Abrams**
- Notify:
- Trigger:
- Review:
- Billable:
- Private:
- Status: **Open**

Other Contacts section:

- Curr Lndr 1: **Barry Able**
- Curr Lndr 2: [Empty]
- Surveyor: **Michael Williams**
- Own Assoc: [Empty]
- Mgmt Co: **Moore & Moore**

Property Description:

4 bedrooms and 2-1/2 baths, formal living and dining room that could be an optional study area, powder room, gourmet kitchen and breakfast nook, family room and stairs leading to the 2 car garage. The second floor has the master bedroom with private master bath and large walk-in closet. There are three more bedrooms upstairs, along with a sizable loft area that could become a 5th bedroom along with an upstairs utility/laundry area. Bedroom #2 has enough room for and optional third bathroom.

The Secondary tab contains links to several contacts that appear on some but not all real estate files. This tab also leaves you plenty of room to add your own fields and includes a large free form Memo field to store the property description or take extensive notes about the file.

REAL ESTATE FORM

Additional Tab

The Additional tab leaves you plenty room to expand with your own unique fields.

The matter closure area provides key reporting data and storage info for easy retrieval of paper files in the future.

The screenshot displays the 'Matter Form - Change' application window. The 'Additional' tab is selected, showing a form with the following fields and values:

- MatterRef: Abrams, Saul RE Buy from Lee, Jay
- Code: /RE.BUY/
- MatterNo: [Empty]
- County: [Empty]
- Staff: [Empty]
- Stage: Negotiations
- Update Dt: 4/15/2008
- Client: Saul Abrams
- Notify: [Unchecked]
- Trigger: [Unchecked]
- Review: [Unchecked]
- Billable: [Unchecked]
- Private: [Unchecked]
- Status: Open

The 'Closing Info' section includes:

- Close Date: 6/07/2008
- Imaged?: Yes

The 'Destroy' section includes:

- Destroy: [Empty]
- Loc | Bin: [Empty]

A vertical label 'Matters - Additional' is visible on the right side of the window.

CRITICAL INFORMATION AT A GLANCE

- Tired of looking in too many places for your critical matter information?
 - IP Associates unique Power Views look inside the Matter for you and pull out the most critical information in one easy to understand view
 - Get quick access to all matter documents, tasks that are yet to be completed, negotiations with the other side, and more – it's easy to stay on top of each matter as it progresses!
 - Nearly two dozen custom Power Views are included with the Domestic Practice Area Template

REAL ESTATE MATTER SYNOPSIS

The Real Estate Matter Synopsis Power View displays the most critical information in one easy to read screen. All of the key contacts as well as others who play a role in the matter are displayed along with easy links back to the full Contact record. Key matter data is only a click away!

Looking for a phone number?
It's here.

Need to send an email? Just click on the email link on the Power View.

The screenshot shows a software interface for a real estate matter synopsis. At the top, there is a header bar with a small icon on the left and text on the right: "Abrams, Saul RE Buy from Lee, Jay ()", "Client: Saul Abrams", "Code: /RE,BUY/", "Source:", and "Staff:". Below this is a section titled "Key Contacts" with a blue header. It lists various roles and names: "Other Party: Stacey Miller" (Main Ph: 123.123.1234, jeff@ipassoc.com), "Their Atty: Debra Mackenzie" (Main Ph: 789.456.1230, jeff@ipassoc.com), "Our Agent:", "Their Agent: Theodore Boland" (Main Ph: 212-555-6734), "Listing Agent:", "New Lender: Samuel P. Branch" (Main Ph: 954-555-0231), "Title Co:", "Surveyor:", "Owners Assoc:", "Mgmt Co:", "Existing Lender 1:", and "Existing Lender 2:". Below this is a section titled "Cast Members" with a green header, listing "Expert Walter Sufouri Environmental" (Main Ph: 212-555-6548) and "Benny Siegel" (Main Ph: 770.555.2121). The bottom section is titled "Case Info" with a grey header and lists "Offer" (2/25/2008, PIN #), "Acceptance" (2/26/2008, PIN #2), "Mort Conting", "Atty Approvl", "Inspection", and "Cl Dat | Loc" (Price/Escrow, Earnest).

ADDITIONAL POWER VIEWS

Other Power Views that greatly increase productivity for a Real Estate practice are:

- Docs – All: Shows all documents linked to the matter, with one click access to the actual file. “Documents” can include copies of PIN records, scanned copies of executed documents, property photos – anything that can be saved as a file!
- Docs Due Back: View a list of any documents for which you expect a response but have not been returned
- Events-ToDos: Easily see all of calendar and task records, with highlighting for ToDos not yet done!

CAST MEMBERS

- Having trouble keeping track of everyone involved in the matter?
 - Cast Member records provide a place to record each person's role in a matter
 - Easily track persons that play a role on a matter but aren't always used, such as soil or environmental experts, additional buyers and sellers, etc.

“EXPERT” CAST MEMBER

This Environmental Expert record is an example of Cast Member. It tracks this person’s unique relationship to this matter. Have they issued a report? Who’s side are they on? What was their analysis?

The screenshot shows a software window titled "Cast Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar (Save & Close, Save, navigation icons, Cancel). The main area has tabs for "Primary", "Related", and "Notes".

Primary Tab Data:

- Date: 2/26/2008 (Tue) Time: 9:56am Code: EXPExpert
- Description: Expert Walter Sufouri Environmental Staff: JSKJeffrey S Krause
- Regarding: Abrams, Saul RE Buy from Lee, Jay (Saul Abrams)
- Reminders: Follow Done Notify Trigger Review Private Status: []

Physical Address Section:

- Name: Walter Sufouri (highlighted in yellow)
- Contact: Atland Consulting, Inc
- Address: 489 53rd Ave.
- City: NewYork NY 10054
- Tel/Fax: 212-555-6548 212-555-6578

Additional Info Section:

- Email: []

Treatment/Testimony Section:

- Who's Side: []
- Specialty: []
- Report: []
- Depo: []

Records Info Section:

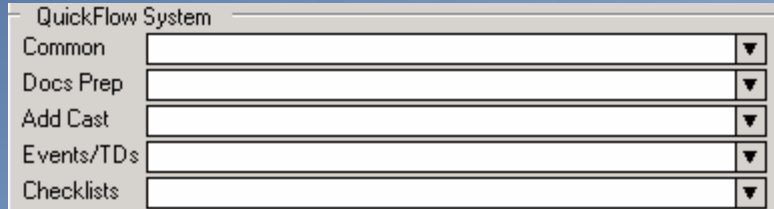
- []

A vertical "Cast" label is visible on the right side of the window.

WORKFLOW & AUTOMATION

- Too many clicks and too much typing to perform one simple task?
 - Our QuickFlow System provides quick and easy access to commonly performed tasks, like creation of letters, delegating ToDos, adding Cast Members, and creating checklists – all in one easy-to-access place!
 - QuickFlow creates records in seconds, not minutes.
 - Less typing = More production
 - Automation = Consistency & speed

QUICKFLOW SYSTEM



QuickFlow System	
Common	▼
Docs Prep	▼
Add Cast	▼
Events/TDs	▼
Checklists	▼

The QuickFlow System Area provides access to commonly performed, often repetitious, functions. With QuickFlow, they are performed faster, with fewer clicks and with less typing.

The Real Estate QuickFlow does all of the following, and more:

Common – Performs common functions like delegating a ToDo, adding a negotiation phone call, and creating standard letters and faxes.

Docs Prep – Draft a variety of useful documents, always pulling the most current information on the linked contacts. Your own templates are easily added to the list.

Cast – Add Cast Members records to the matter such as Experts, Attorneys, etc.

Checklists – Buyer and seller checklists allow you to easily track all the tasks and documents necessary to complete a real estate transaction.

COMMON FEATURES OF IP ASSOCIATES TEMPLATES

Every Practice Template includes a number of standard features, including:

- Document management, tracking and auto-naming system
- ToDo Delegation system
- Over two dozen custom Power Views
- Quick Tabs that aid in filtering and tracking of records
- A common look and feel to the matter/case forms
- The QuickFlow System for automation of common tasks

To see a discussion of all the common features to our templates, please browse to the “Common Features to Our Templates” PDF on our site, or visit www.ipassoc.com/commonfeatures.htm. These features are key components and significantly enhance the usefulness of our templates.

PRICING

- Pricing is based on the number of TM/PA user licenses
- Licensing one-to-one with TM/PA users
- \$400 for the 1st TM user license
- \$75 for each additional user license
- Multiple template purchases provide discounts on each additional template; *Example, if 5 Practice Areas with 10 TM licenses \$2,000 for 1st user (5 x \$400) + \$75 x 9 additional users = \$2,675.00*

HOW TO ORDER

- Through your local Certified Independent Consultant (CIC)
- Online at www.ipassoc.com/realestateorder.htm
- If ordering more than one template, go to www.ipassoc.com/practicetemplatesorder.htm
- Call 888-732-9071
- Download order form and fax to 866-258-9062

FOR MORE INFORMATION

IP Associates, LLC

5002 Mesa Court

Waterford, WI 53185

888-732-9071 Tel.

866-258-9062 Fax

<http://www.ipassoc.com>

info@ipassoc.com