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Are You Ready for High-Tech Document Management?

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By *Susan Springer*

Realtors are finding that the right document management system improves the efficiency of their business, paves the way for a virtual office and allows them to complete deals faster. Such a system adds up to being more productive. And profitable!

Once upon a time—back in the 1990s—there were paper file folders. Then came electronic documents and now you can access those files and documents in the “cloud” whenever and wherever your business happens to take you. (“Cloud” computing refers to the delivery of computing and storage capacity as a service to a heterogeneous and diverse community of end-recipients.)

The Advantage of the “Cloud”

Lih Pearl knows the advantages of easy access to the *most recent* version of an agreement the moment you need it. Pearl, co-owner of Canada’s L&L Real Estate Investments, runs a successful and mostly mobile office which specializes in buying and selling apartment buildings and investment properties.

“We have an office where we can meet clients but most clients we meet on site like it if we go to an apartment building. We’re very mobile. If you have an iPad or an iPhone, you can log in and save a document and everyone else involved can immediately see it which is very good—an invaluable asset” said Pearl.

Time Saved—Money Earned

Pearl’s team expands to fit any particular deal. Depending on the transaction, Pearl may bring in her trusted experts including lawyers, engineers, MBA’s, and mortgage agents. All need immediate access to current documents. If Pearl had to return to her office to sort through emails to find the most recent attachment, valuable time would be wasted. Instead, Pearl and her colleagues use DocPoint Document Management to tame their volume of transaction related files.

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“It makes the retrieving process much, much easier when I’m traveling and I need something really, really fast,” said Pearl.

Versatility

“You can retrieve files from a laptop when you are in an airport or sitting in a McDonald’s or anywhere you’ve got free Wi-Fi,” said DocPoint software developer Dr. Jacob Kirshenboim.

DocPoint began as a software program to help Kirshenboim’s secretary be more efficient and has grown into an international company with clients around the globe, from lawyers, educators, Realtors® and countless others. The software is integrated with Microsoft Office.

“Start working with it and you feel at home because many of the features you are *already* using these days,” said Kirshenboim, who adds that DocPoint is as familiar as everyday tools such as Google searches.

Kirshenboim created DocPoint to help small-to-medium-sized businesses track their documents, store them safely and retrieve them in seconds.

“DocPoint manages files and it doesn’t matter if they are in Word, Excel, PowerPoint, music files, video files, or whatever. It keeps track of where they are in your server and saves them in original format,” said Kirshenboim, adding that files are not converted to other formats but simply saved “as is” in DocPoint.

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Pearl said the key to her real estate business success with document management was a little training to organize files by address and type so all of her colleagues can easily find the right document. Simply put, her company has a virtual database system.

“I think the main thing is to index the right way so that when someone else is looking for something particular, they will know quite readily—and easily—how to find it,” said Pearl.



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Susan Thomas Springer is a writer and journalist who has published hundreds of articles in magazines, newspapers, and online. Her writing services include ghostwriting, copy writing, marketing materials, messaging, white papers and video scripting. Topics she frequently writes about are real estate and construction, business, and the arts. In her corporate career, she has led communications for a bank, coordinated international high-tech product launches, and managed a newsroom for a CBS affiliate. You can reach her at her website: www.susantspringer.com or telephone: 541-719-0139. Her e-mail address is: susan@susantspringer.com

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Support

In addition to a DocPoint manual, help is available online and by phone but Pearl and her team didn't need it. Most real estate offices new to document management begin by setting a date and inputting active client files. While most files these days are electronic, DocPoint also offers ScanPoint to transform paper documents into electronic documents, creating a truly paperless solution.

"It's very easy to use. Your employees can start working on it after a very short training period," stressed Kirshenboim.

Earlier this year, Pearl tried the free DocPoint trial and liked it—quickly realizing her higher productivity. She appreciated that it took no "IT" help or major training time to implement. Before document management, she and her team spent considerable time at the end of each month e-mailing pertinent documents to each other. Now, there's no need to take those hours to share documents.

Global Convenience

It's been a long journey since Kirshenboim's secretary used a ledger to track all the paper documents which came in and out of the office—or wasted hours asking who had what missing file. Now business people in many countries and languages simply "click" and find what they need.

"You can do it from anywhere in the world—it's very easy," said Kirshenboim, adding that people can easily share their repository of documents with selected colleagues anywhere by simply giving them a user name and password.

"We were looking for something to help us manage our business more efficiently so we'd be able to search or retrieve documents easily. DocPoint helps us do all that in a most professional way," said Pearl.

(Learn more about the "Cloud" and DocPoint at www.docpoint.biz.)



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