

EFFECTIVE SOLUTIONS FOR NOTE AND REAL ESTSTE INVESTORS

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- Due Diligence Automation
- Portfolio Management System
- Web Presence

We give answers to Business Owners and CEO's to questions they have been struggled for the last 10 years.

- 1. How can technology help me manage my company's operations?*
- 2. How can I be more competitive using technology tools in my industry?*
- 3. How can I be more agile to identify and capture opportunities faster than my competitors?*
- 4. How can transforming my business to digital make me and my company a winner in the next 5-10 years?*

Very few companies are using digital technology for new processes to radically improve their ability to function in a way that enables them to respond at rapid rate in order to compete in the high-speed business world of today.

In This document we will see how NOTEPROZ services will help you become a leader in your industry.

Speed with Due Diligence Automation

Project Details

1. Due Diligence in Seconds via automation.

A. With Noteproz Basic plan you will be able to:

a. Search through a data base of asset managers in the states that have most assets to sell.

b. **Copy and paste addresses into our property scraper and obtain:**

- Bed/Baths
- Finished sq/ft
- Estimated Low value
- Estimated High value
- Last Sold Year
- Price Sold Price
- Tax Assessment Year
- Tax Assessment Amount
- Type of House
- Year Built
- Lot sq/ft
- Crime Data of the Area
- Rental Rate Value
- Google Maps View
- Contact Realtors in the Area
- Export all this data into a CSV sheet
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Portfolio Management Like a Fortune 500

2. Portfolio Management Systems

B. With Noteproz Pro plan you will be able to:

a. Dashboard with overview of:

- Total Investor Investment
- Total Invested (Investor + Rolled Profits)
- Profit
- Avg Mths Invested
- ROI (Lender Investment)

- Total ROI (Lender + Rolled Profits)
- Annualized ROI
- Active Notes
- Closed Notes

b. Admin Functions:

- Managers for your team
- Create Investor user access
- Create JV's
- Create assets

c. Financial Functions:

- Create Investor Deposit/Withdraw
- Create New Asset Income and expense
- General Ledger

c. Reports:

- **Investors report**
 - Statements
 - JV Groups
 - Assets
 - Amount loaned
 - Profit
 - ROI
- **JV Reports**
 - Assets
 - JV ID
 - Date
 - Loaned Amt
 - % Owned
 - Revenue
 - Profit
 - ROI to Date
 - Annualized
 - Active Assets
 - Investors

- **Assets reports**
 - JV ID
 - Asset ID
 - Asset photo
 - Status
 - Address
 - Document
 - Loaned Amt
 - Owned
 - Revenue
 - Expenses
 - Profit

- **Cashflow Report**

Choose by: Asset, Investor, Date , Income / Expense / Asset / Reverse

- Overview : Currently Loaned - Cashflow to Date
- JV ID
- Asset ID
- Amt
- Date
- Transaction
- Memo

Web Presence is Utterly Important

All plans include our industry leading support, secure hosting service, and conversion tools.

Web Presence Package

- Premium Website Hosting
- Website Domain / Domain Transfer
- Basic Note Website
- Deal Portfolio
- (For Note Websites Only)
- 5 Deal Website Updates Per Month
- (For Note Websites Only)

- Business FB Page Creation
- (Includes pro custom cover image and profile picture)
- Corporate LinkedIn Page.
- (Includes pro custom cover image and profile picture)
- Twitter and Instagram Profile Creation
- 1 Animated Logo Intro for videos

Aggressive Presence Package

- All Web Presence Features +
- Full Custom Website
- Weekly Social Media Posts
- Investor Data Base Creation
- Biweekly Weekly Newsletter Set Up and Launch
- 1 Video Creation A Month (Includes Animated Logo Intro)
- Facebook Ad Campaigns
- YouTube Channel Creation
- Google Analytics and Webmaster Tools Integration
- All the digital support you need
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Links and resources

Product	Description	Price	Link
Noteproz Basic	Asset Manager DB + Property Data Scraper	\$27 mo	https://noteproz.com/register
Noteproz Pro	Asset Manager DB + Property Data Scraper + Portfolio	\$67 mo	http://www.crm.noteproz.com/register

	CRM manager		
Web Presence Package	Website + Custom Social media profile creation	\$99 mo	https://notepro.com/packages
Aggressive Presence Package	Custom website + social media profiles and postings + Video editing,	\$299 mo	https://notepro.com/packages

Asset manager CRM How To's

How to Manage Asset Income & Expenses

1) Enter Income and Expenses for Assets

- a. Click on **Financial, Asset-Inc/Exp, Create**
- b. In Create
 - i. Pick the Asset from the drop down list
 - ii. Choose the Transaction Type
 - iii. Date
 - iv. Name related to the transaction
 - v. Enter Amount
 - vi. Choose the GL code from the dropdown (Set these up in General Ledger under Financial tab)
 - vii. Memo - include notes if pertinent
 - viii. Enter Transaction to Save

2) Create General Ledger categories

- a. Click on **Financial, General Ledger, Create**
- b. In Create
 - i. Add the name of your G/L account

How to Create a JV and add Assets

- 1) Set up an Investor
 - a. If **new Investor** click on **Admin, Manage Investors, Create** and set up Investor
 - b. If **existing Investor** go to next step.

- 2) Deposit Investor Cash
 - a. Click **Financial, Investor Cash Account, Create**
 - b. In **Create**
 - i. enter Date, Select Investor, Amount, enter Transaction Type - Deposit (this adds the Investor cash to his account with you), Enter Transaction to save

- 3) Create a JV
 - a. Click **Admin, Manage JV's, Create**
 - b. In **Create**
 - i. give your JV a name, Start Date, Choose your Company, enter JV % your company gets in the deal, the Select Investor/s and amount invested for that JV.
 - ii. Click Save - will take you back to the JV list
 - iii. Click on your newly created JV name from the list to review

Notes -

 - iv. (can have multiple JV partners, the software automatically figures the percentage)
 - v. (don't have to use all Investor funds on one JV. Can be spread out over multiple JV's)

- 4) Create Assets (add to JV)
 - a. Click on **Admin, Mange Assets, Create**
 - b. In Create, enter all the pertinent info
 - i. Property Info
 - ii. Owner Info (if occupied by note maker)
 - iii. Purchase Info
 1. Assign to JV deal here
 - iv. Sales Info (when sold at later date)