



2017 Fall Conference

**GETTING DOWN TO BUSINESS
UTILIZING DATA STANDARDS**

Transaction Data

The Next Frontier for Data Management in the Real Estate Industry.



SPEAKER

BIO PAGE

Aida Bryce

Sr. Director Product Management

Aida Bryce is the Senior Director of Product Management at DocuSign, where she leads the company's Global Real Estate product team. In this role, she's responsible for defining the Company's product strategy for the Real Estate industry and setting its product roadmap.

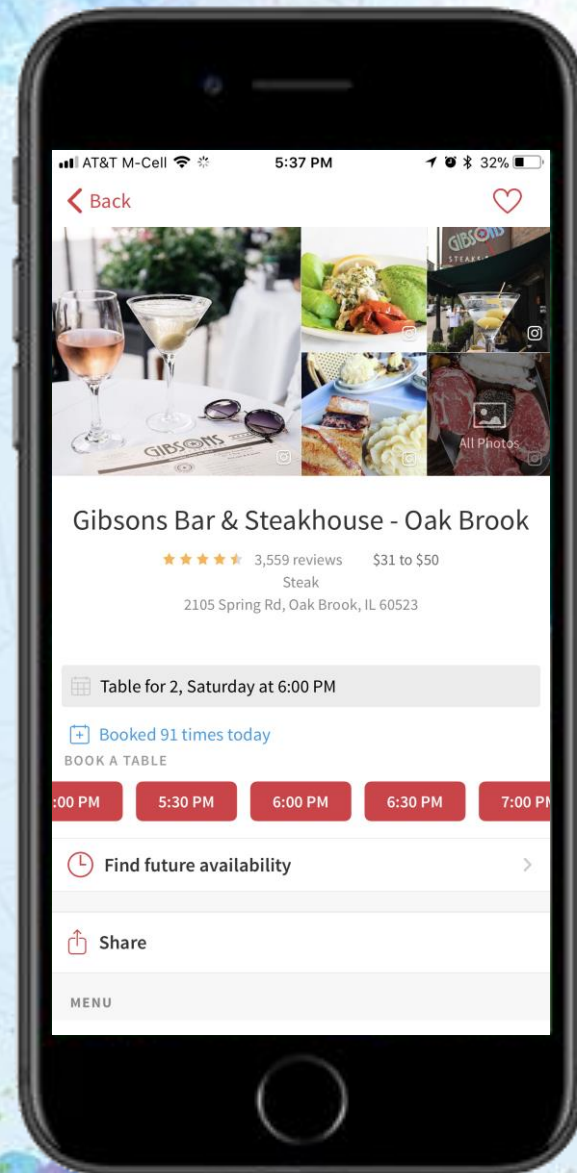
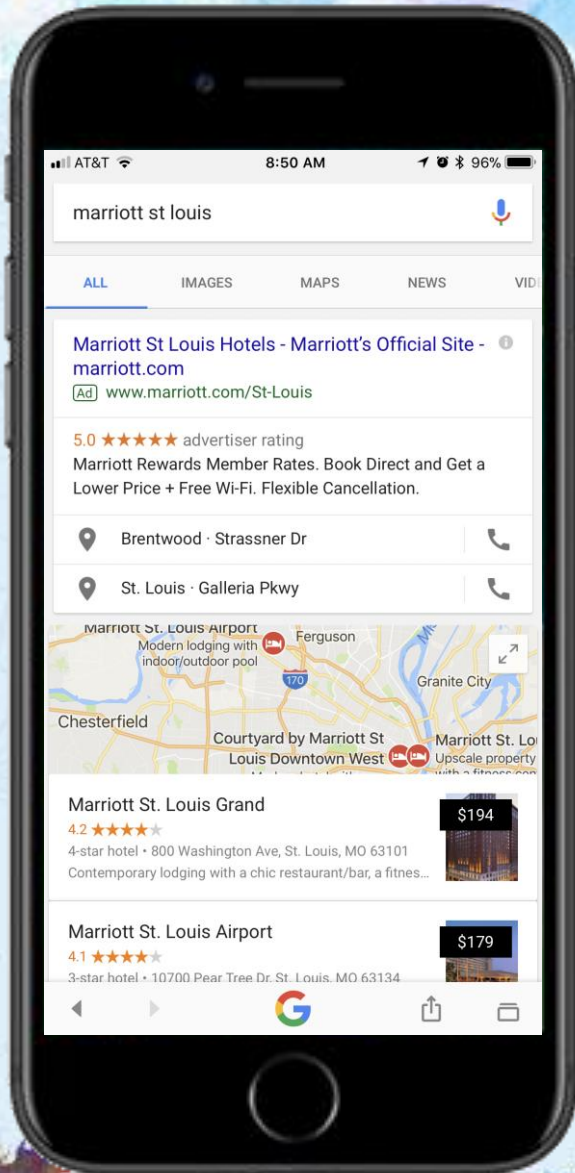


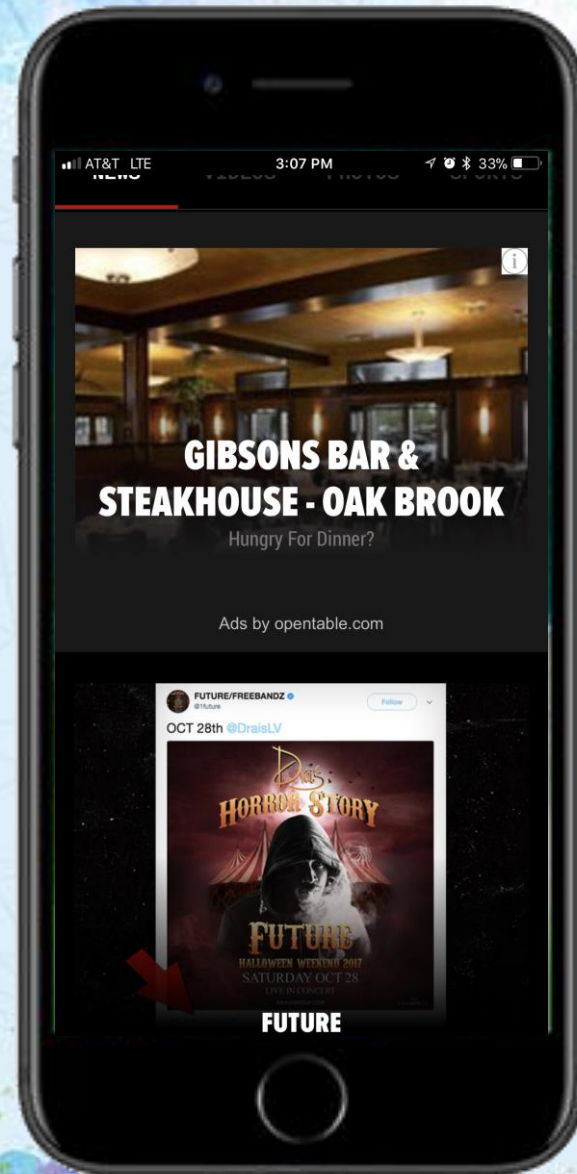
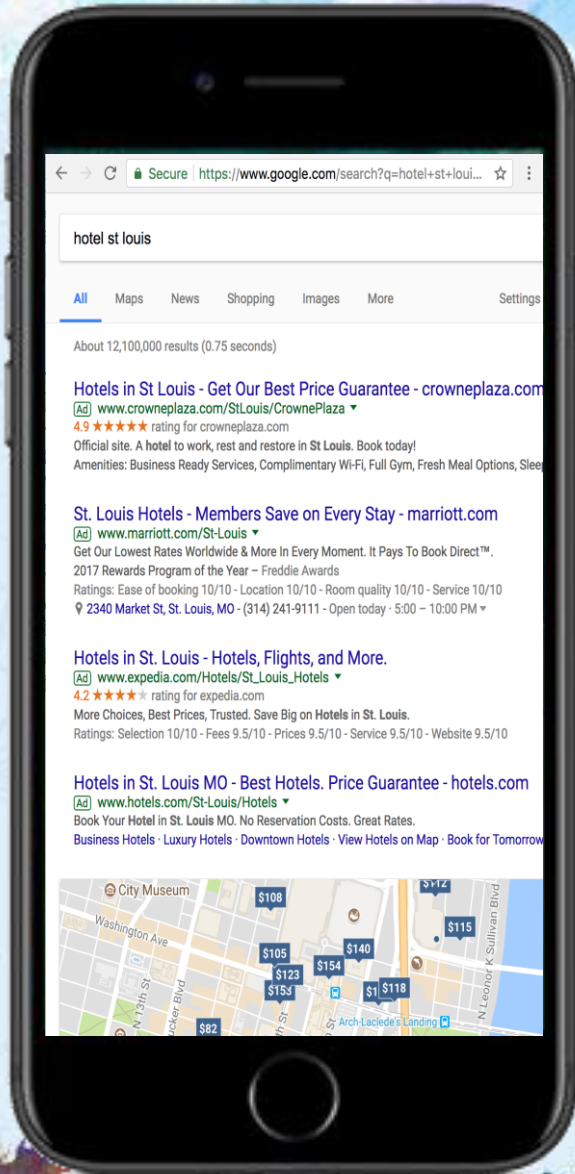
Email: aida.bryce@docusign.com

Website: www.DocuSign.com

Twitter: [@DocuSign](https://twitter.com/DocuSign)









DATA MAKES THE
WORLD GO ROUND

CAPTURE



MANAGE



GAIN
VALUE



**FOR
SALE**

SO WHAT'S
THE CONNECTION?



**REAL ESTATE
REVOLVES AROUND
VAST AMOUNTS OF
DATA**

FIND the BUSINESS



CLOSE the BUSINESS



PROPERTY



SELLERS



MLS



LISTING PORTALS

3448 Down Hill Ct, Saint Charles - \$1,299,900
5 beds - 6 full, 1 half bath - 8,385 sq ft - 2.5 acres lot

Property Details

Open House
Thursday
January 14, 1:00 PM to 3:00 PM

Overview
THE OPPORTUNITY HAS NEVER BEEN BETTER THAN NOW TO OWN AN ESTATE HOME IN WOODS OF GRADE ROAD THIS EXCLUSIVE BRICK-IRA BEAUTY IS MORE THAN BOOBY OF LIVING ENJOYMENT ABOVE GRADE AND ANOTHER ABOVE* TO ROAM IN YOUR PRIVATE WOODS OF BASKING* YOU WILL FALL IN LOVE AS SOON AS YOU WALK INTO THE FRONT AND SEE THE CHANGELING AND CURVED-UP FRONT STAIRCASE, WALNUT CUSTOM-PANELED LIBRARY, SCREENED PORCH, SUNROOM, SAUNA, FIRE PLACE, YOUR OWN GARAGE, ALL ON 2.5 ACRES OF LAND. WOODS CANNOT HOMESTAY. DESCRIBE HOW GREAT THIS HOME IS, IT IS BETTER THAT YOU SCHEDULE AN APPOINTMENT TO SEE IT YOURSELF! MAKE SURE YOU HAVE YOUR PRE-APPROVAL OR YOUR PROOF OF FUNDS LETTER READY, BECAUSE THIS WON'T TAKE MUCH THOUGHT TO REALIZE THAT THIS HOME IS THE ONE FOR YOU!

Key Facts

- Stable Customization
- Single Family Home
- Year Built 2002
- Prospect 5167
- Status New

Additional Listings
by STAN WRIGHT, REALTOR®

Bedrooms

- 2nd Bedroom Level: 2nd Level
- Bedrooms Above Ground: 5
- Master Bedroom: 2A16
- Master Bedroom Bath Full
- 3rd Bedroom Level: 2nd Level
- 4th Bedroom Level: 2nd Level
- Master Bedroom Flooring Carpet

CONTRACTS

6 Personal Property included therein. Seller agrees to convey to Buyer or to Buyer's designated grantee, the 7 Real Estate with the approximate lot size or acreage of 0.75 commonly known as:

8 2133 Pueblo Court Naperville Illinois 60563
9 Address City State ZIP

10 Will Unit # (if applicable) 3848598
11 County Permanent Index Number(s) of Real Estate

12 **If Condo/Coop/Townhome Parking is Included:** # of space(s) identified as Space(s) #
13 **(check type)** deeded space limited common space assigned space.

14 **3. FIXTURES AND PERSONAL PROPERTY:** All of the fixtures and included Personal Property are owned by 15 Seller and to Seller's knowledge are in operating condition on the Date of Acceptance, unless otherwise stated herein. Seller agrees to transfer to Buyer all fixtures, all heating, electrical, plumbing and well systems 16 together with the following items of Personal Property by Bill of Sale at Closing:

17 **[Check or enumerate applicable items]**

2 Refrigerator	1 Central Air Conditioning	1 Water Softener (owned)	X Light Fixtures, as they exist
1 Oven/Range/Stove	1 Window Air Conditioner	2 Sump Pumps	Built-in or Attached Shelving
1 Microwave	5 Ceiling Fans	1 Electronic or Media Air Filter	X All Window Treatments & Hardware
1 Dishwasher	1 Intercom System	1 Central Vac & Equipment	Existing Storms & Screens
1 Garbage Disposal	1 TV Antenna System	1 Security Systems (owned)	Fireplace Screens/Doors/Grates
24 Trash Compactor	1 Satellite Dish	3 Garage Door Openers	Fireplace Gas Logs
25 1 Washer	1 Outdoor Shed	3 Garage Door Openers with all Transmitters	Invisible Fence System, Collars & Box
1 Dryer	1 Planted Vegetation	X All Tacked Down Carpeting	Smoke Detectors
27 Attached Gas Grill	1 Outdoor Playsets		Carbon Monoxide Detectors

28 **Other items included:**
29 **Items NOT included:** Hot tub
30 Seller warrants to Buyer that all fixtures, systems and Personal Property included in this Contract shall be in

TRANSACTION MGMT

DocuSign

123 Franklin Drive
Naperville, IL 60563
City Street: #142015
#1 #1201197

Sally Stevens
Real Estate Agent
312-588-8005
sallystevens@courtesy.com

DETAILS **TASKS** **DOCUMENTS** **PEOPLE** **ENVELOPES**

TRANSACTION INFORMATION

Status	Under Contract	Under Contract	12/16/2015
Side	Broker	Role	7:22 AM
MLS ID	6786786	Origin of Lead	12/16/2015
Buyer		Buyer	7:22 AM

TRANSACTION ROOM ACTIVITY

WSA - Rules and Regulations	Assigned to Task List by Sally Stevens	12/16/2015
DOCK	Assigned to Task List by Sally Stevens	12/16/2015
Engagement Letter	Delivered by Stan Thomas	11/30/2015
Plot of Survey	Assigned to Task List by Sally Stevens	11/30/2015
Buy - Sell Agreements (7 Page 1)	Assigned to Task List by Stan Thomas	10/20/2015
Disclosures Packet	Applied to Room by Stan Thomas	10/20/2015
Loan Application	Applied to Room by Stan Thomas	9/28/2015
AD AM overview		9/28/2015

BUYERS



CRM

realvolve

KATHY YATES
Owner

Notes & Correspondence

Activities

Tags

1. I have just got the property delivery address and I will be...
2. This agreement is a good contract on all levels and...
3. I would like to thank you for the information you provided...
4. I am looking for a property to purchase in the area...
5. I am looking for a property to purchase in the area...
6. I am looking for a property to purchase in the area...

ACCOUNTING SYSTEM

CanAmra Realty

General Ledger Accounts [P: 2/2]

Account: 12100

Classification: OFFICE EXPENSES & SUPPLIES

Normal Balance: Debit

Transaction Date: 12/16/2015

Amount: 100.00

Track By Project: [X]

Enter DR, Description

**WHO
OWNS** **it?**



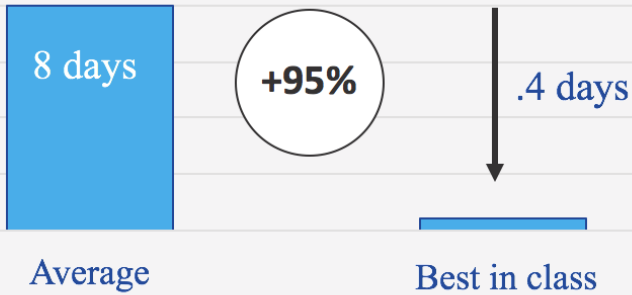
Why should I care?



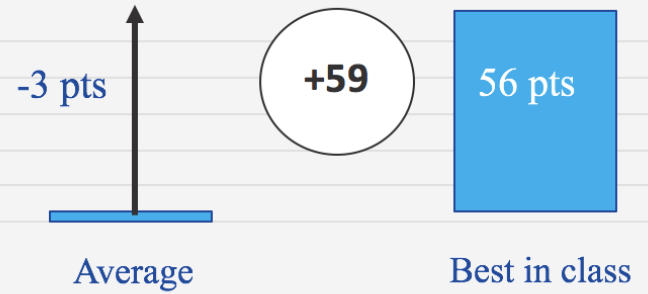
OVERALL RATING



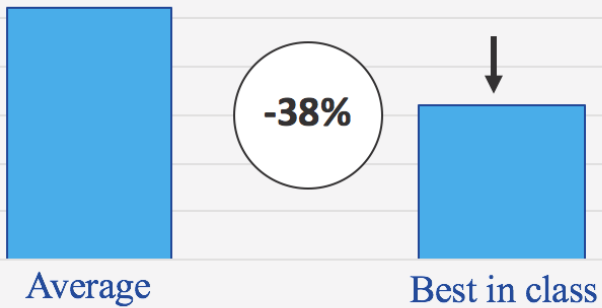
Speed



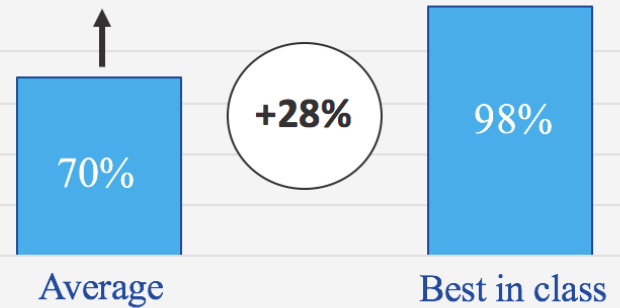
Net Promoter



Cost/Transaction



Compliance

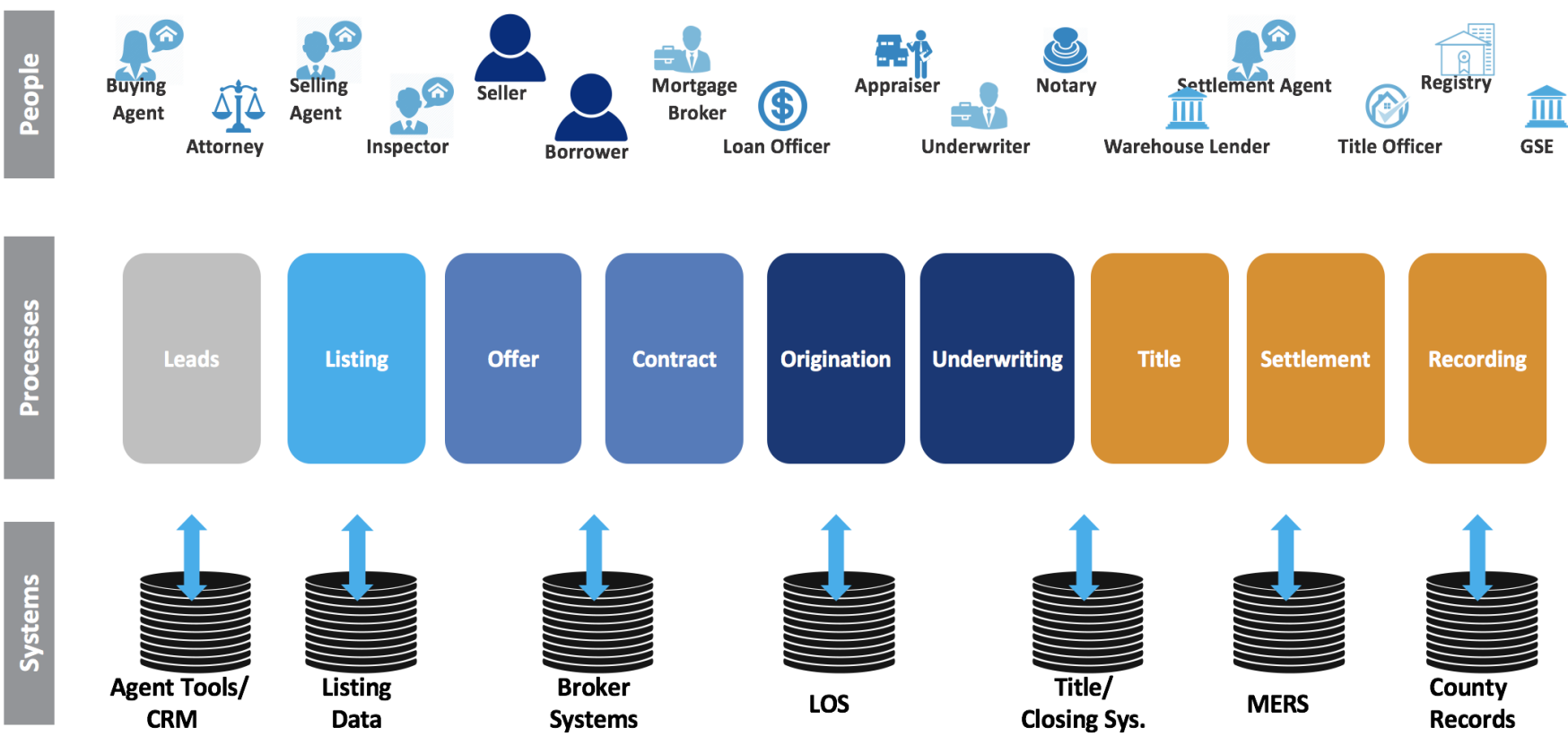


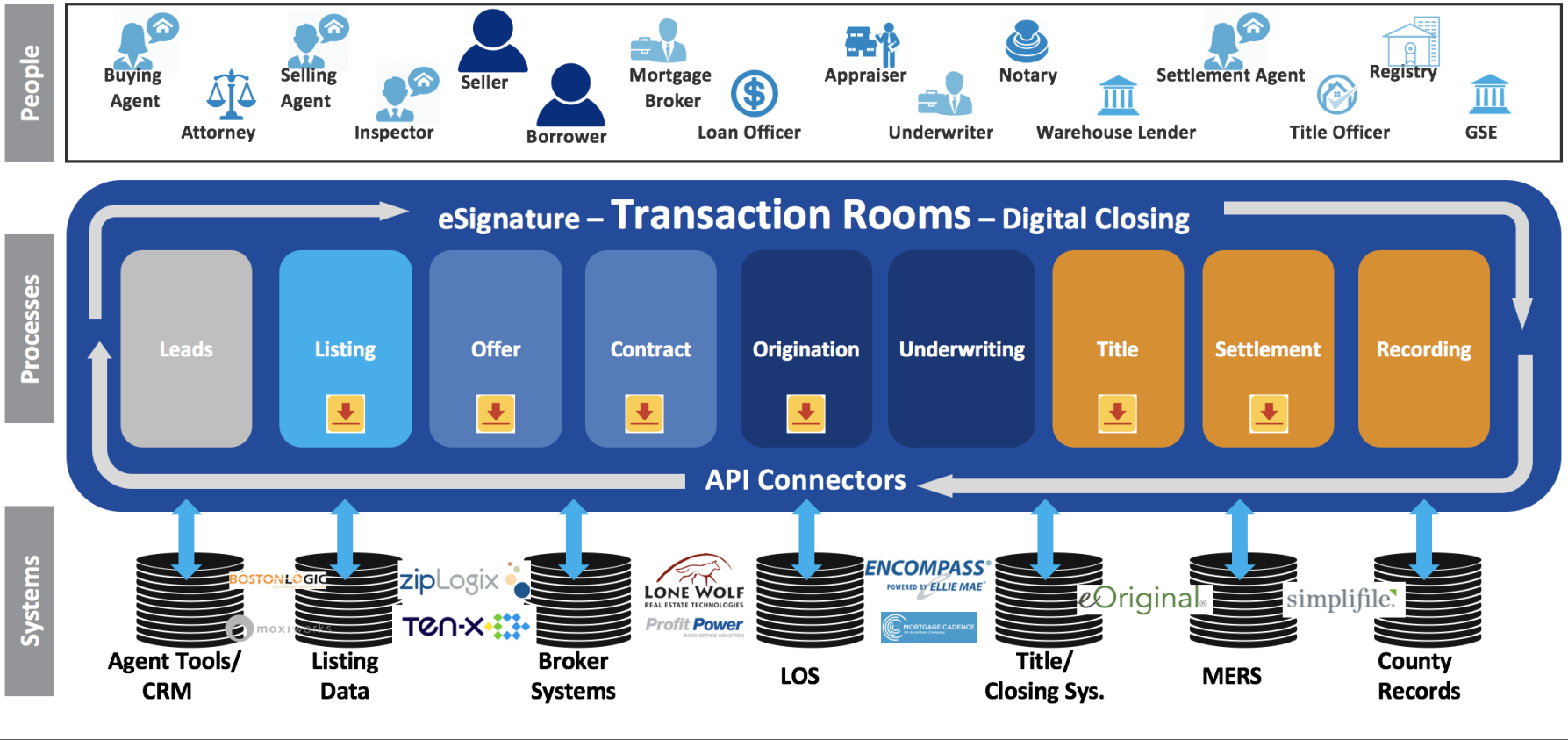
eClosing

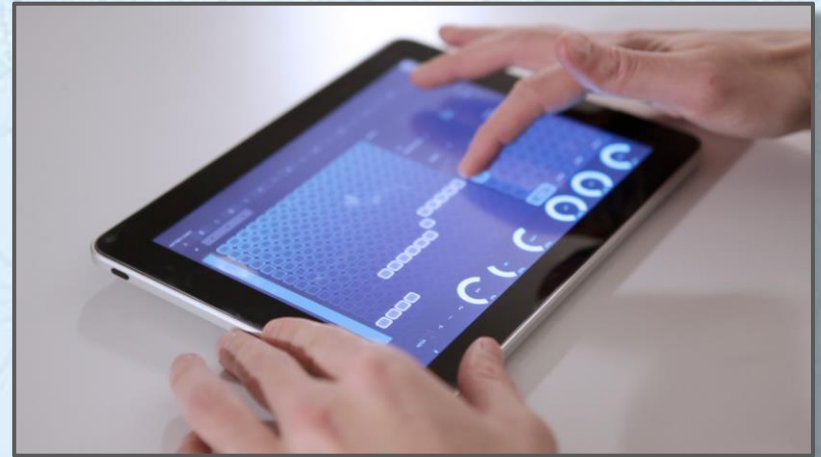


Why is this
so hard?





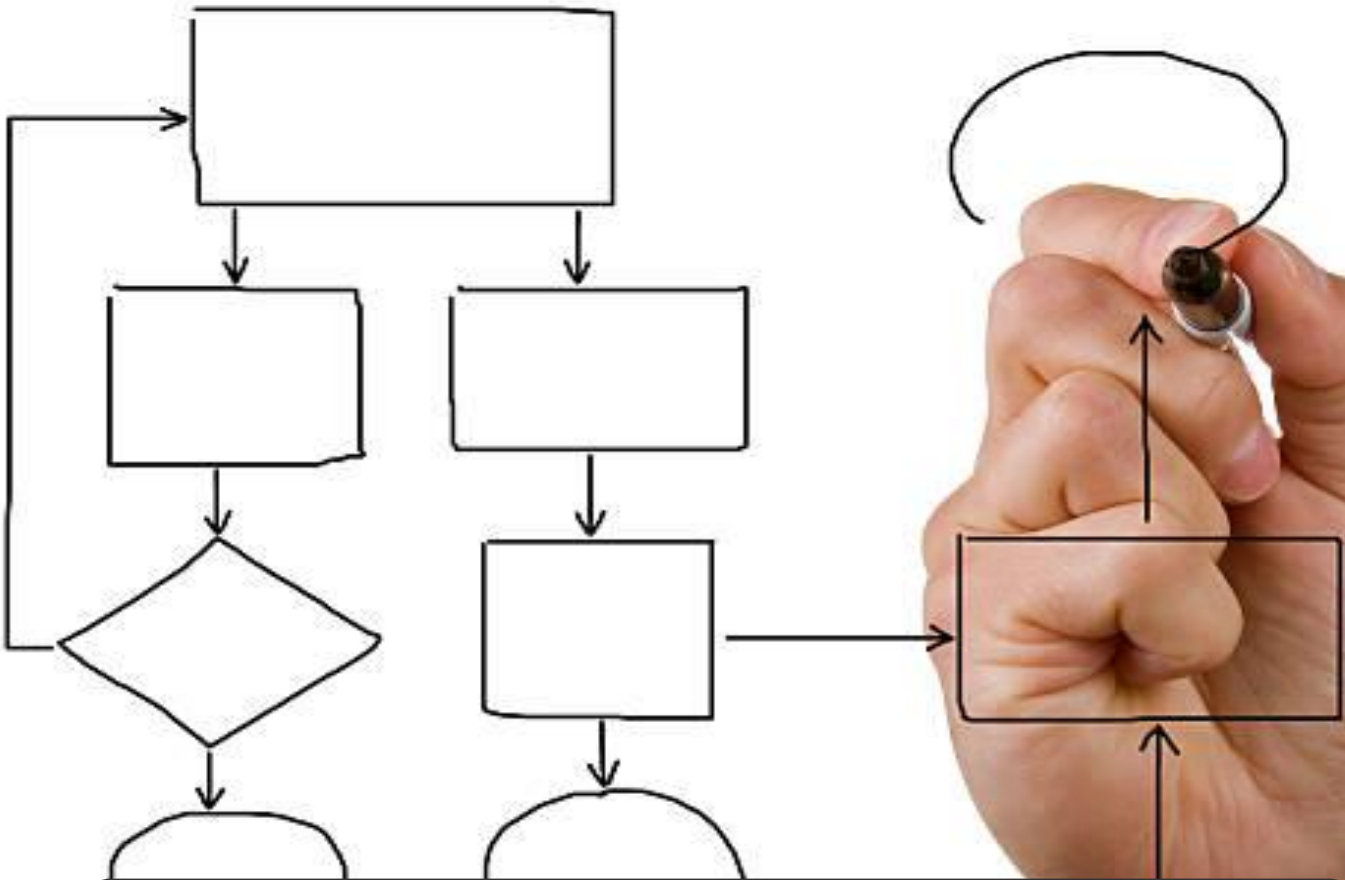








WHAT now?

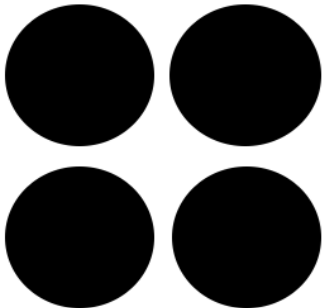


Map your experience

“Find the Business”

Connecting buyers and sellers through agents
[Marketing & Sales]

Portals



Broker / Agent Websites



MLS's



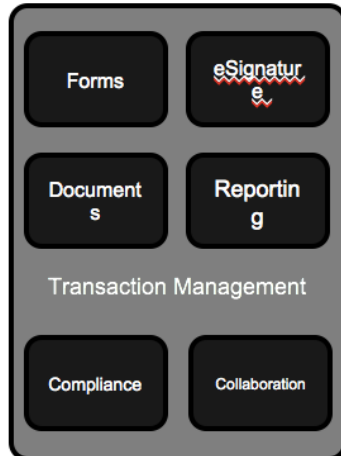
Broker / Agent tools



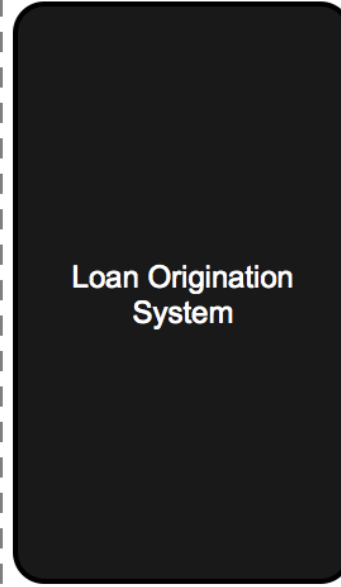
“Close the Business”

Contract to Closing
[Operational]

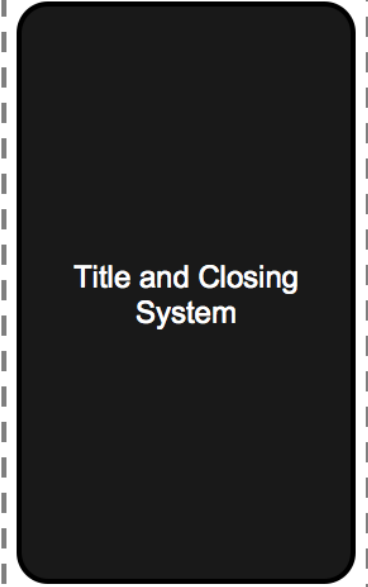
Brokerage



Mortgage



Title



Inventory your data

Privacy Policy



Last updated on October 4th, 2015.

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DocuSign, Inc. has been awarded TRUSTe's Privacy Seal signifying that this Privacy Policy and our practices have been reviewed by TRUSTe for compliance with [TRUSTe's program requirements](#) including transparency, accountability, and choice regarding the collection and use of your personal information. TRUSTe's mission, as an independent third party, is to accelerate online trust among consumers and organizations globally through its leading privacy trustmark and innovative trust solutions.

This Privacy Policy explains:

Know your rights

Data Dictionary

What is the Data Dictionary? It's Real Estate's "Rosetta Stone"

The Data Dictionary serves as the real estate industry's "Rosetta Stone" for real estate data. Hundreds of MLS, and other source providers, gather data. *But what good is it if the data cannot be shared or understood?* The Data Dictionary ensures that each system "speaks" the same language. It is the common standard that defines real estate data in consistent terms and data structures; a template data providers may follow to format its most common fields.

The RESO Dictionary has two purposes.

1. Serve as a non-RETS guideline for a national standard for the fields and look-ups (enumerations) in the MLS.
2. Common center for all expressions of fields and enumerations.

As an MLS reviews change, it is advised to consider the benefits of growing closer to the national standard. Not only will it make the effort of ensuring RESO compliance easier, it will also ensure that as listings progress through IDX and other aggregation points, the meaning of your data is not diluted or misinterpreted.

The Data Dictionary is broken down into the following tabs. Please review the following details and information on use of the dictionary.

Meta-Definitions: This page should be reviewed first. It contains the definitions about the fields used in the RESO Dictionary to define the fields and look-ups.

Recommendations: List of suggested Data Dictionary changes including discussion notes.

RESO Dictionary: Each Data Dictionary resource will have its own tab containing fields and their defining details. Dictionary tabs include: Property, Member, Office, Media and History.

Enumerations: This tab has the list of enumerations, or pick lists, that have been defined thus far. Keep in mind, that unless "locked" all lists are extensible.

Deleted Elements: These are fields or enumerations that have been deleted from the dictionary.

An MLS will probably use a subset of the Data Dictionary, as not all Data Dictionary fields apply to every MLS.

Data Dictionary Certification

RESO Data Dictionary Certification is awarded to data providers that conform to current RESO Data Dictionary Standards.

The RESO Data Dictionary Certification page includes a [Glossary](#) (PDF) of common terms is also available.

The "RESO Data Dictionary Certification" documents should be read by any

These documents should be read by any

Data Dictionary Certification

Click [here](#) to apply for a Data Dictionary Certificate.

Data Dictionary Downloads

[Version 1.4](#)
(2015-07-21)

[Version 1.3](#)
(2014-07-03)

[Data Dictionary 1.3 Core Fields](#)
(2014-10-29)

[Version 1.2](#)
(2013-11-21)

[Version 1.1](#)
(2013-05-21)

[Version 1.0](#)
(2012-04-24)

Click [here](#) to access additional information on the Data Dictionary Workgroup.

The xDTM Standard

The Standard for Managing Digital Transactions

To support the shift to Digital Transaction Management, experts from diverse industries came together to develop a foundational set of criteria that is becoming the standard for managing digital transactions.

The xDTM Advantage



Security

Features best-in-class technical protection, highly secure access, and proactive protection policies.



Privacy

Allows a person or company to reveal information selectively, at their discretion.



Availability

Offers continuous availability to systems and data.



Compliance

Conforms to industry policies, standards, and laws. Engages recurring third-party auditing and self-assessment to verify compliance.



Universality

Functions across heterogeneous environments/devices and is accessible worldwide.



Scalability

Accepts increased volume without impacting performance due to ongoing capacity modeling and proactive lifecycle management.

Accountability to standards

PROPERTY



SELLERS



MLS



LISTING PORTALS

Property Details

Open House Thursday, January 14, 1:00 PM to 3:00 PM

Overview

Key Facts

- Stable Customization
- Single Family Home
- Year Built 2002
- Prospect 51517
- Status New

Additional Listings

Features

Bedrooms

- Bedrooms (All Levels) 5
- Bedrooms (Below Grade) 5
- Master Bedroom 2A16
- Master Bedroom Bath Full
- 2nd Bedroom Level 2nd Level
- 3rd Bedroom Level 2nd Level
- 4th Bedroom Level 2nd Level
- Master Bedroom Floating Carpet

CONTRACTS

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9 Address City State ZIP

10 Will Unit 7 (if applicable) 3848598
11 County Unit # (if applicable) Permanent Index Number(s) of Real Estate

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8 Microwave	9 Ceiling Fans	10 Sump Pumps
11 Dishwasher	12 Intercom System	13 Electronic or Media Air Filter
14 Garbage Disposal	15 TV Antenna System	16 Central Vac & Equipment
17 Trash Compactor	18 Satellite Dish	19 Security Systems (owned)
20 Washer	21 Outdoor Shed	22 Garage Door Openers
23 Dryer	24 Planted Vegetation	25 all Transmitters
26 Attached Gas Grill	27 Outdoor Playsets	28 All Tacked Down Carpeting
		29 Carbon Monoxide Detectors

29 **Other items included:** Hot tub
30 **Items NOT included:** Hot tub
31 Seller warrants to Buyer that all fixtures, systems and Personal Property included in this Contract shall be in

TRANSACTION MGMT

DETAILS | **TASKS** | **DOCUMENTS** | **PEOPLE** | **ENVELOPES**

TRANSACTION INFORMATION

Status	Under Contract	Under Contract	12/16/2015
Side	Broker	Role	7:22 AM
MLS ID	86786786	Origin of Lead	12/16/2015
Buyer		Assigned to Room by Stan Thomas	7:22 AM
Engagement Letter		Assigned to Room by Stan Thomas	11/30/2015
Plan of Survey		Assigned to Room by Stan Thomas	11/30/2015
Buy - Sell Agreements (7 Page 1)		Applied to Room by Stan Thomas	10/20/2015
Disclosures Packet		Applied to Room by Stan Thomas	7:31 AM
Loan Application		Applied to Room by Stan Thomas	9/28/2015
Special Circumstances		AD AM overview	9/28/2015

BUYERS



CRM

realvolve

KATHY YATES

Notes & Correspondence

Activities

Tags

ACCOUNTING SYSTEM

CanAmery Realty

General Ledger Accounts [P: 2/2]

Last 10 Dates

Account	Trans	12/16/2015
Classification	Trans	12/16/2015
Normal Balance	Yes	12/16/2015
Track by Project	Yes	12/16/2015



DATA MAKES THE
WORLD GO ROUND

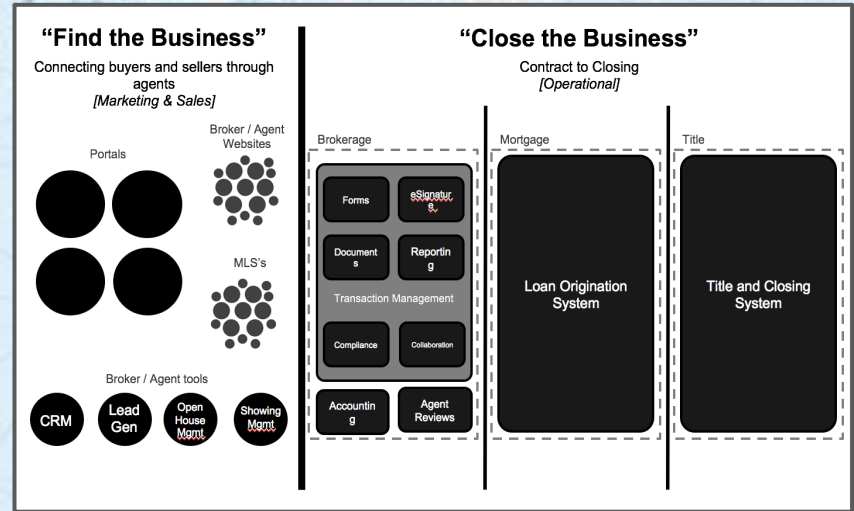
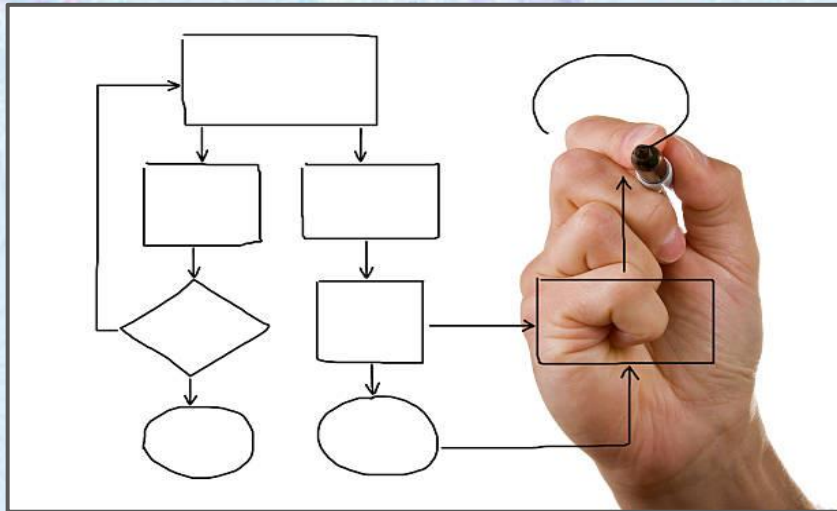
CAPTURE



MANAGE



GAIN
VALUE



DocuSign | Contact | Support & Training | Resources | Partners | Access Documents | LOG IN

How It Works | Features & Benefits | Solutions | Pricing | Customers | Company | FREE TRIAL | BUY NOW

Privacy Policy

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This Privacy Policy explains:

1. The Information We Collect
2. How We Use the Information We Collect and How We Collect it

RESO REAL ESTATE STANDARDS ORGANIZATION | MEMBER LOGIN | RESO COLLABORATOR

HOME | JOIN | ABOUT RESO | EVENTS | RESOURCES | CONTACT US | MEMBERS ONLY

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The "RESO Data Dictionary Certification Signing Rule v1.6.5" contains the RESO Data Dictionary Certification requirements. These documents should be read by any organization who wants:

xDTM | The xDTM Standard | About xDTM | Meet the Board | Get Involved

The xDTM Standard

The Standard for Managing Digital Transactions

To support the shift to Digital Transaction Management, experts from diverse industries came together to develop a foundational set of criteria that is becoming the standard for managing digital transactions.

The xDTM Advantage

- Security:** Reduce risk on data transfer of sensitive digital content, content, and production processes and data.
- Privacy:** Allow a person or company to control information availability, at the discretion.
- Availability:** Offer continuous availability for systems and data.
- Compliance:** Customers to reduce content, compliance, and legal. Ensuring that each country and well understood to each jurisdiction.
- Universality:** Provide access, interoperability, and performance due to the industry open to working and providing the best experience.
- Scalability:** Access increased volume without impacting performance due to the industry open to working and providing the best experience.

QUESTIONS?



**THANK YOU
EVERYONE**

 **RESO**[®]
2017 Fall Conference

