Folio FAQ

(Last Updated 6/24/26)

What is Folio?

Folio is an AI-powered email productivity tool that turns the unstructured firehose of emails into a powerful and secure business organizer. Folio layers on top of Gmail or Microsoft365 inboxes, automatically detects real estate transactions, helps create beautiful timelines for consumers, and seamlessly pushes key transaction details directly into BoldTrail BackOffice for compliance. Folio achieves greater agent productivity and delivers an elevated consumer experience, while gaining faster access to transaction details for brokerage review and compliance.

How did this come about?

Inside Real Estate – the strategic partner of REMAX – announced the acquisition of Folio by Amitree in February 2024. Today Folio helps compress the email workflow for more than 100,000 real estate agents, enabling them to streamline their processes and close more deals. To date, the company has organized over 2.5 billion emails and saved professionals over 3 million hours.

People can read more about the acquisition here.

How can someone sign up for Folio?

REMAX affiliates will receive an email from Inside Real Estate with a unique link to sign up for Folio. The email will come from folio@amitree.com. The reply-to address will go to customersupport@remax.com.

The subject line will be "Exclusive Access to Folio Pro: Your New Transaction Assistant."

Note: This email should not be forwarded. The invite link is unique to each user.

What happens if someone can't find the email to sign up for Folio?

Users can reach out to REMAX Customer Support.

To reach Customer Support:
- Access the blue chat bubble within a MAXTech powered by BoldTrail account.
- **Online:** MAX/Center > Customer Support (link in left column) > "Chat with an Expert" or "Submit a Case"
- **Text/Call:** (888) 398-7171

Once someone gets the email, then what happens?

Affiliates can click the unique link to sign up for Folio. They will be taken to a page where they can connect their Gmail or Microsoft 365 email. Once there, they will need to agree to the terms and conditions and allow Folio access to their email. These terms and conditions are prompted by Google and Microsoft and must be accepted to use Folio.

What is onboarding like?

Folio will send a series of helpful emails once someone signs up. These will come from customersupport@remax.com . The emails include:
- Helpful tips, training and how to get started information
- Additional emails helping you setup a transaction and share timelines

Does Folio store the emails?
No. The emails are not stored. Folio organizes and labels an inbox.

Is there any additional investment associated with Folio?
No. This solution is available to REMAX affiliates at no additional investment.

How does Folio work?
More than 95% of transactions are conducted over email. Folio's patented technology helps brokers, agents and teams:
- Automatically organize unstructured transaction emails into patented Smart Folders
- Generate branded timelines that will impress buyers or sellers
- Customize their service providers to assist clients throughout their closing journey
- Set the tone for the transaction by sharing the timeline with everyone involved, keeping everyone on the same page.
- Easily access the contact information of everyone associated with the transaction

- Save time by summarizing and extracting critical dates and milestones from real estate contracts

How are the folders created?
Folio's AI system analyzes and extracts critical data from emails such as addresses and organizes emails into Smart Folders.

How long does it take to organize?
Once installed, Folio will begin scanning emails up to 30 days prior looking for transactions to start helping you get your real estate communications organized. As new emails are received, the Folio solution will analyze and organize them in real time.

Can someone manually make a folder to have Folio organize it?
Yes. Once a folder is manually created, Folio will scan incoming emails to organize them into the appropriate transaction folder.

Does Folio work on mobile devices?
Yes.

Does Folio work with any email providers besides Gmail and Microsoft 365?
Folio only works with Gmail and Outlook. Other email providers like Hotmail, AOL and Yahoo are not designed in a way that is advanced enough to handle Folio's level of technological organization.

What browsers should people use with Folio?
All modern supported browsers work for the web and mobile app. If a user is connecting through Gmail, however, they should use Chrome, which will provide the best user experience with the Folio Chrome Extension.

What is an example of Folio's workflow?
Folio sits on an agent's inbox and easily identifies transactions within the inbox. When an agent writes an offer, for example, Folio will identify it and begin putting all communications and documents into a Smart Folder.

From there, Folio helps extract essential dates and transaction related milestones from communications and contracts and sets up a timeline. This timeline can then be shared with buyers or sellers and other key stakeholders to make sure nothing is missed.

What are the timelines?
Folio automatically creates a timeline that mirrors the essential dates. Affiliates will have a landing page that shows the timeline for the transaction. The affiliate can add other dates to this timeline that will be helpful for the life of the transaction. They can also add local resources like preferred vendors that can help throughout the transaction, and local services, like quick links to utilities and address change information.

The timeline can be shared with buyers or sellers to help them stay on track. It can also be shared with teammates or others critical to the process like lenders.

The timeline will sync to the affiliates calendar as well and has the capability to sync to any other stakeholders calendars.

Affiliates can also add their own service providers to the timeline, to ensure buyers and sellers are working with trusted advisers.

Users can also brand their timelines with a headshot and company logo that will show up on the timeline when it is shared with stakeholders. By default, they will be initially imported from MAXTech.

What templates are available for the timelines?
Users can create templated timelines that include any events specific to their business. This will make creating a tailored experience for their buyers and sellers truly effortless.

Templates can include staggered and dependent dates that are important in every transaction but be personalized as needed to meet the needs of every client.

For example, if an agent has a pet owner, a timeline task may be added to remind the client to set up pet-sitting services the day of the move.

What is Folio DocGPT & AutoGPT?
This is Folio's built in ChatGPT system. Users can have it scan a document to ask a question or extract critical details. Users can ask up to 5 questions per month. Data is only used in a private AI model, meaning it is never shared publicly or used any public AI models.

What happens if someone already had a Folio account?
Upon activation the user will be upgraded to the REMAX account and will no longer have to

pay. If someone signed up in the past 60 days, they may request a refund by contacting REMAX Customer Support.

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Does Folio connect to MAXTech powered by BoldTrail

Folio does not connect directly to MAXTech powered by BoldTrail. The Folio solution sits on a user's email and is agnostic to which CRM or other solutions a user may use.

Will it connect to BoldTrail BackOffice, the next generation of BrokerMint?

Yes, once a Broker/Owner has launched BoldTrail BackOffice, Folio will connect and make it so documents can seamlessly be sent to the back office solution.

The launch of BoldTrail BackOffice will begin in Q4, 2024.

Is there a version of Folio for teams?

There is, but not currently for REMAX accounts.

Those with existing team accounts will be left on their accounts so they don't get downgraded to an individual account through the normal onboarding path. Should an existing team user receive an invite email, once they try to connect an email that is associated to an existing team account, they will be told to stop onboarding and go through Customer Support.

Will office managers be able to create timelines and share them with the office?

While timelines can be shared with anyone involved with a transaction to create transparency and get everyone in sync, timeline templates are unique to each account. They cannot be shared with other users.

What eSign partners does Folio connect with?

Folio will organize email into smart folders. This will work regardless of what eSign solution an affiliate chooses to use. All emails will be scanned for details relating to the transaction, then be organized into smart folders based on those key details. Folio also integrates with DocuSign and BoldTrail BackOffice for executing contracts.