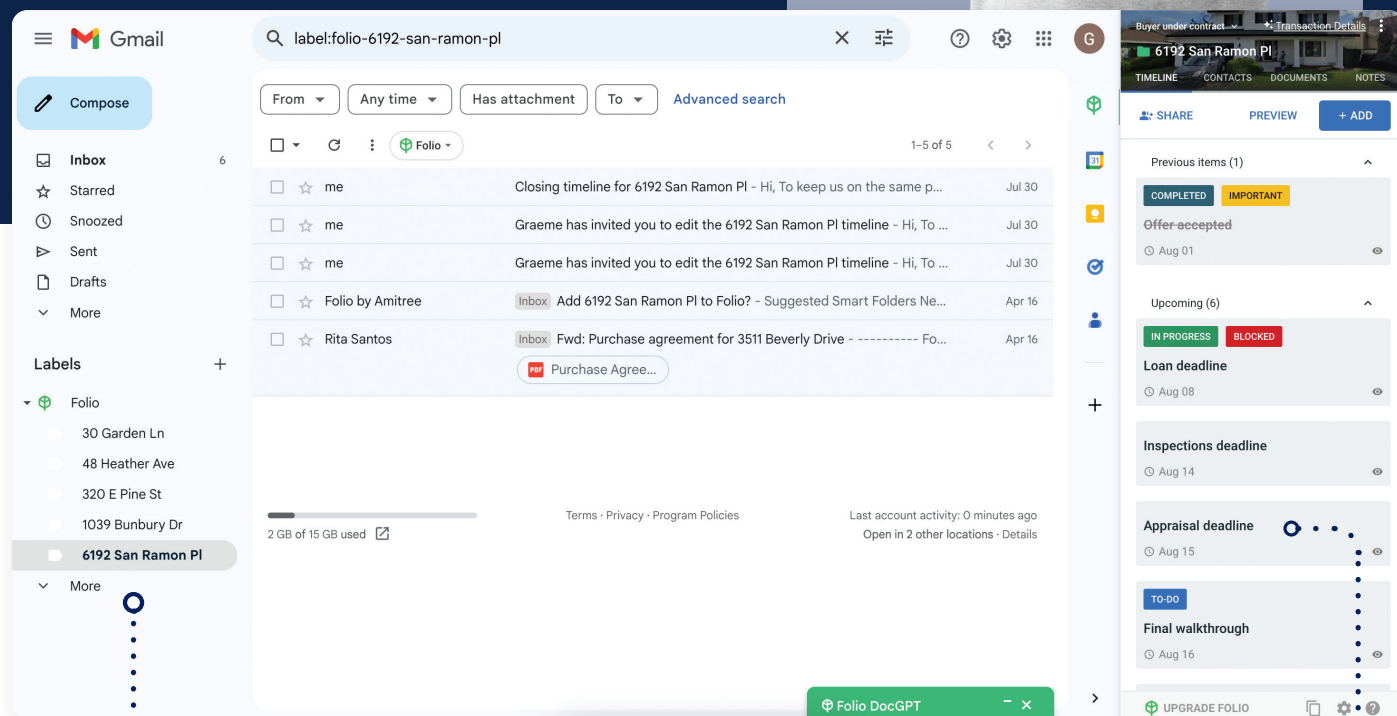


MAXTECHSM
powered by **BoldTrail**



Your email, organized by transaction

The first email assistant for busy agents.



Transactions get automatically sorted into Smart Folders.

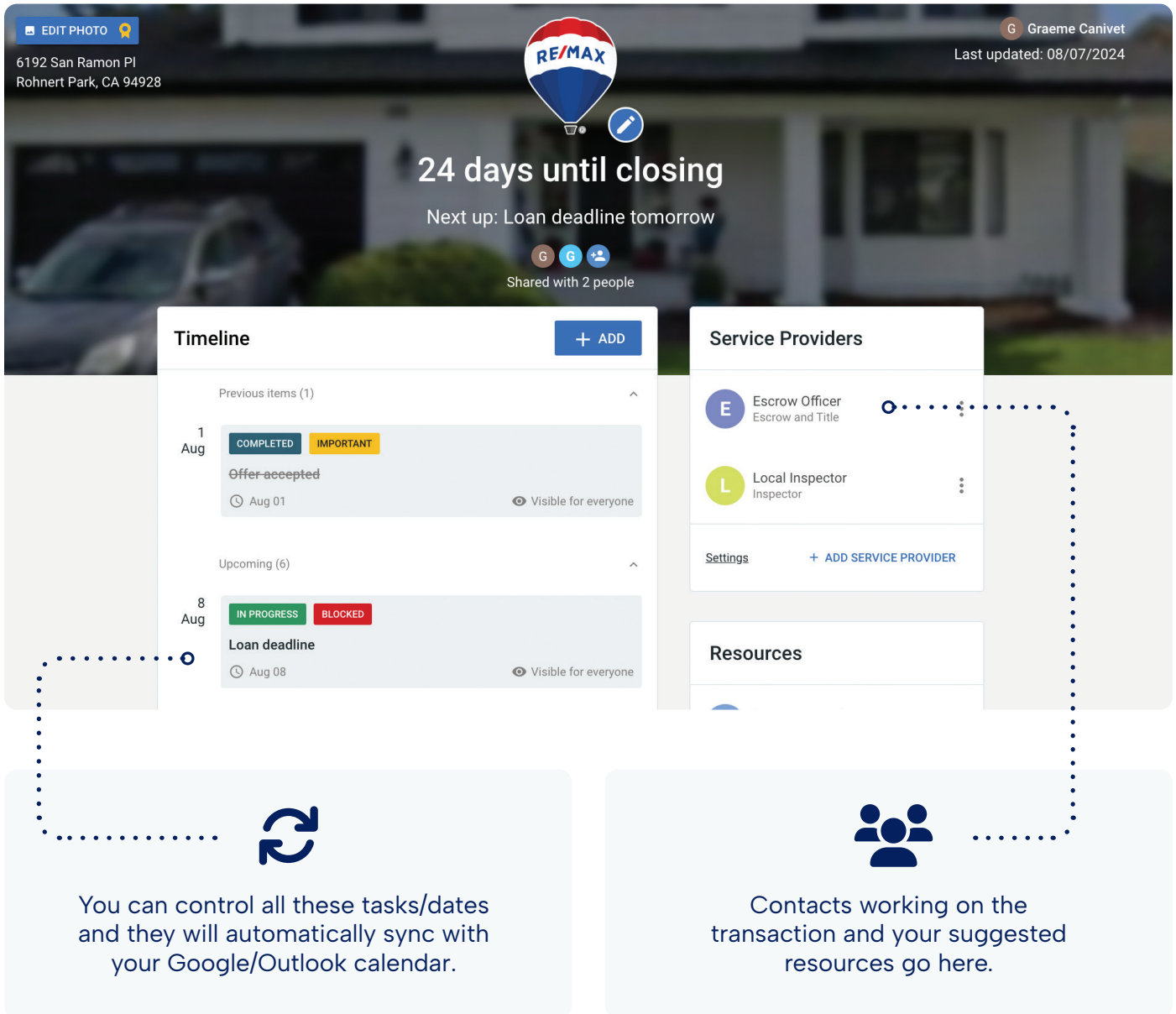


All the files, contacts, timelines, and notes organized in a handy sidebar.

Folio plugs in to your Gmail (or Outlook.com) and automatically gets to work sorting emails by transaction. All your documents, files and contacts also get organized right there in the email so you never have to search again.



Automatic Timelines



The screenshot displays the Folio app interface for a real estate transaction. At the top, it shows the property address: 6192 San Ramon Pl, Rohnert Park, CA 94928. The RE/MAX logo is prominently displayed. A central banner indicates "24 days until closing" with a sub-note "Next up: Loan deadline tomorrow". Below this, it states "Shared with 2 people". The interface is divided into two main sections: "Timeline" and "Service Providers".

Timeline Section:

- Previous items (1):** A task titled "Offer accepted" is marked as "COMPLETED" and "IMPORTANT", dated Aug 01, and is visible for everyone.
- Upcoming (6):** A task titled "Loan deadline" is marked as "IN PROGRESS" and "BLOCKED", dated Aug 08, and is visible for everyone.

Service Providers Section:

- E** Escrow Officer (Escrow and Title)
- L** Local Inspector (Inspector)
- Buttons for "Settings" and "+ ADD SERVICE PROVIDER".

Resources Section:

Below the app screenshot, two callout boxes provide additional information:

- Calendar Sync:** A circular arrow icon indicates that tasks and dates can be controlled and will automatically sync with Google/Outlook calendars.
- Contacts and Resources:** A group of people icon indicates that contacts working on the transaction and suggested resources go into the "Service Providers" section.

Automatic timelines keep your clients informed with all the stuff you're doing behind the scenes to keep things on track, so your phone isn't ringing with frantic questions. Folio is powered by AI that can detect transactions right in a busy real estate agent's email, but it also is able to detect things like the contract sign date to kick off an automatic timeline that can be shared in seconds.



MAXTECHSM + folio
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