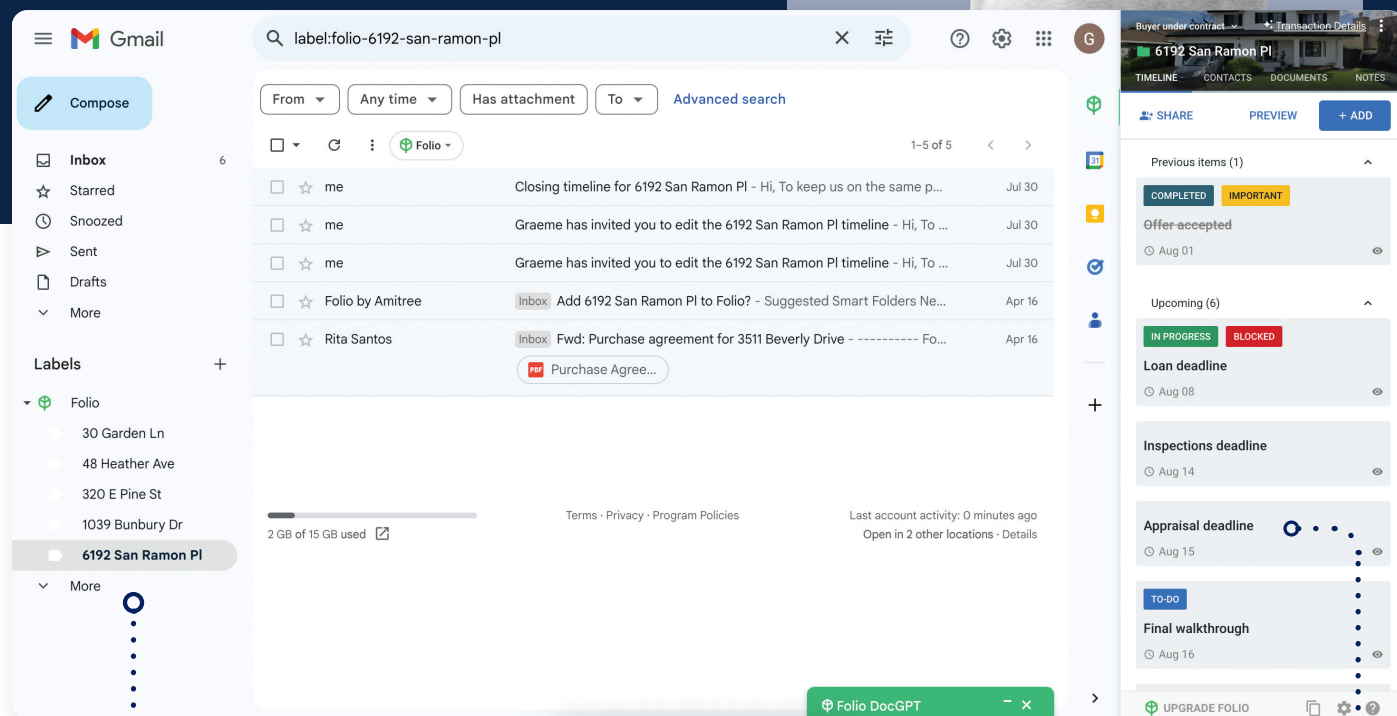


MAXTECHSM
powered by **BoldTrail**



Your email, organized by transaction

The first email assistant for busy agents.



Transactions get automatically sorted into Smart Folders.

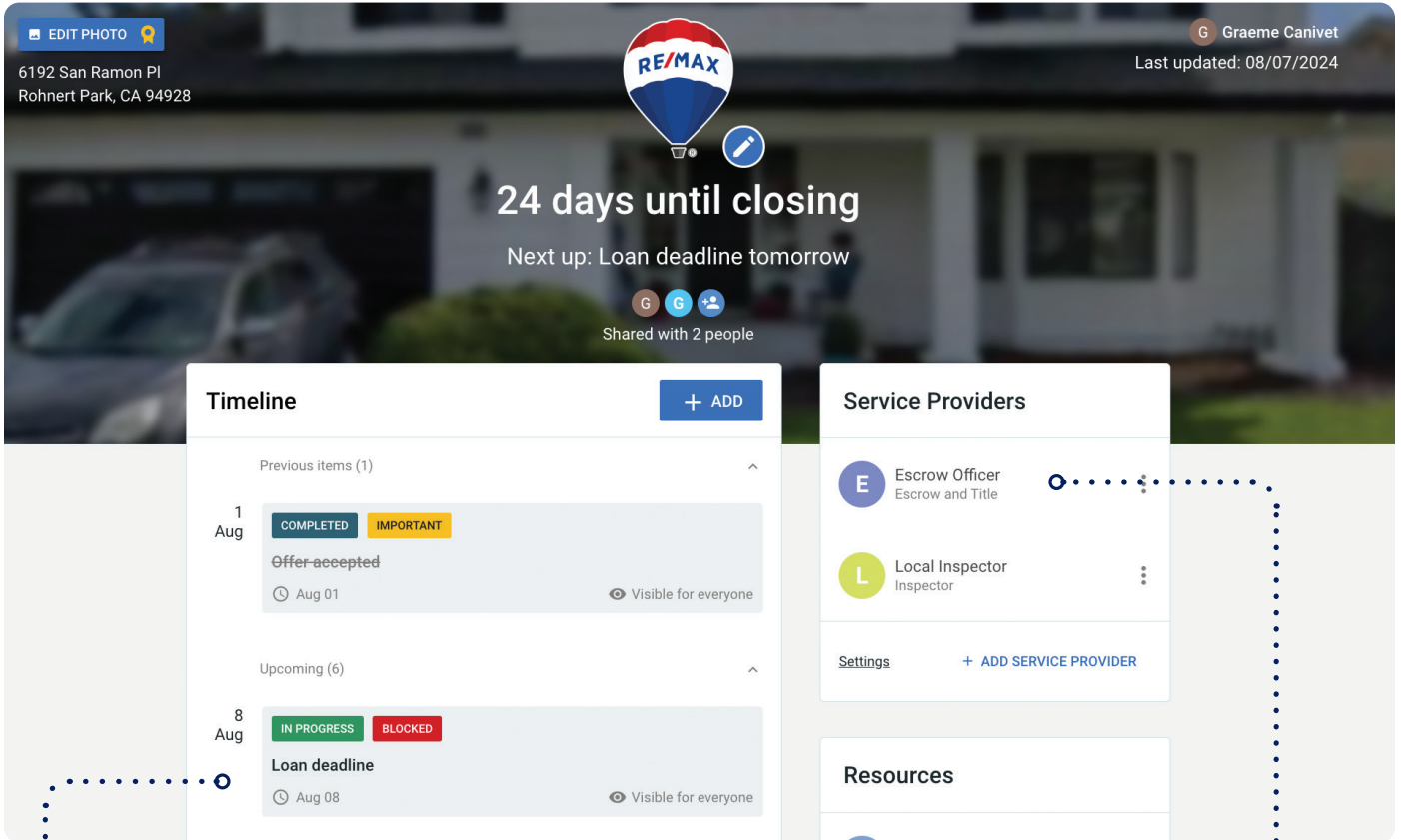


All the files, contacts, timelines, and notes organized in a handy sidebar.

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 shows the Folio app interface for a real estate transaction. At the top, it displays the address "6192 San Ramon Pl, Rohnert Park, CA 94928" and the agent's name "Graeme Canivet" with the last update date "08/07/2024". A large RE/MAX logo is centered above the main heading "24 days until closing". Below this, it says "Next up: Loan deadline tomorrow" and "Shared with 2 people". The interface is divided into two main sections: "Timeline" and "Service Providers". The "Timeline" section shows a list of events: "Offer accepted" on Aug 01 (Completed, Important) and "Loan deadline" on Aug 08 (In Progress, Blocked). The "Service Providers" section lists "Escrow Officer" and "Local Inspector". A dotted line connects the "Loan deadline" event in the timeline to a callout box below. Another dotted line connects the "Service Providers" section to a callout box below.



You can control all these tasks/dates and they will automatically sync with your Google/Outlook calendar.



Contacts working on the transaction and your suggested resources go here.

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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