BoatDox Is Yacht Sales Management Simplified

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Managing your listings and deals may conjure up excitement – the thrill of the chase, getting a client, negotiating a deal, making the sale happen, and of course the money at the end. BoatDox supports you in this quest. Its real-time Dashboard shows the appropriate information for each person on the team, enabling them to quickly get an overview of where everyone is in the process. The Listing and Deals lists use built-in color coding to let you see at a glance what stage a listing or deal is in. No more confusion or the boss thinking a transaction isn't moving forward; right away he or she will be able to see the stage and broker. With the custom BoatDox eSign capabilities, everyone associated with the transaction within the brokerage also will be able to see when the contract has been sent, viewed and signed. Knowing the status of transactions enables you to make good decisions about the next step.

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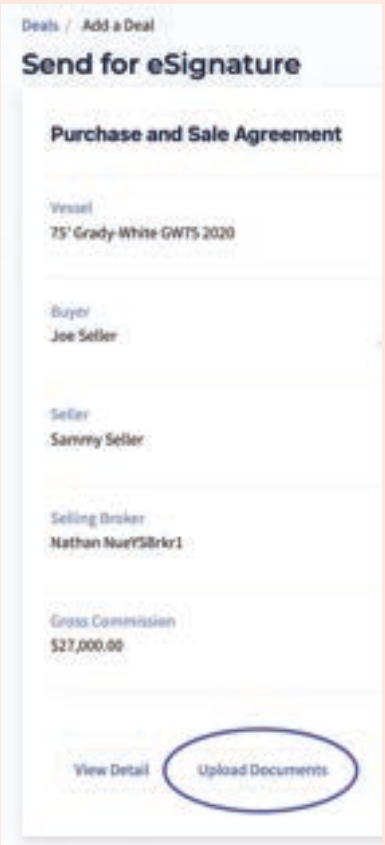
This is managing yacht sales at its best.

But then, there's the other side of yacht sales management – the paperwork side. Now, before you stop reading, this is where the "Simplified" in "Yacht Sales Management Simplified" comes in. Keeping everyone, from the broker and owner to closing agents and admins, on the same page (pardon the pun) is key to a smooth transaction and happy closings. Adding vessel listing and deal information is simple and straightforward utilizing step-by-step navigation that allows you to jump in and out of transactions adding information as soon as you receive it and easily add the accompanying documents.

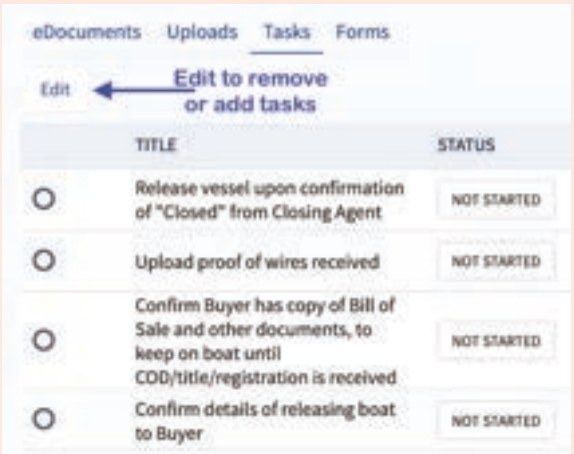
As we develop BoatDox, we're keeping in mind our tag line, "Secure. Intuitive. Trusted." along with our mission of Yacht Sales Management Simplified. We can't wait for you to use this tool and see for yourself.



← **Tip 1:** Each time you add information, go to the eSign page, click on the "Upload Documents" button to add the documents needed for the transaction. You'll also see the full list of documents needed and thereby be reminded of additional ones you'll need for a smooth closing.

Speaking of closings, your in-house closing agent also will be able to see all the documents and information the broker and admin have added and know immediately what additional information, if any, is still needed. As the broker and admin input information into the system, it automatically gets added to the closing documents.

Tip 2: Adding tasks that are unique to the deal or listing to the Task List, in addition to the usual default items, serves as a helpful reminder to you and your team. It supports communication throughout the transaction, especially during closing. The Task List can be updated at any time, including during closing when the seller notifies you that although they thought all personal items were off the vessel, the cat bed in the guest berth wasn't taken off. You can add a reminder to have it removed from the vessel to the Task List so the buyer who is of course allergic to cats won't be affected.



Tip 3: When you receive a deposit on a vessel, use the search function on the Deals List to quickly find the buyer or vessel that the deposit belongs to. This is Yacht Sales Management Simplified.

↑ **Tip 4:** In keeping everyone on the same page, when a listing or deal has sold, there's a handy "Action" button you can click to mark it "Sold". It's a great last step to let everyone know the transaction is complete. You can still access it and see the documents, but the transaction will now show up in the Sold/Closed list on the Listings and Deals pages, on the Dashboard and in Reports. Plus, the color changes so it's easy to see.

Visit www.boatdox.org to sign up for more information and get on the waitlist.