

Working with Listings and Sales in Command

Revised 08/25/23

Path to Get Paid

1



Enter a Lead or Client as a Contact in Command.

2



Create an Opportunity for a Contact that decides to List or Purchase a home.

3



Create a Listing or Buyer Opportunity. Enter details of an Offer. Review, accept and submit the Offer.

4



Complete your Commission request and submit to the Market Center within 1 business day.

5



Upload individual documents into the respective Document Slots in Checklist and submit for review.

6

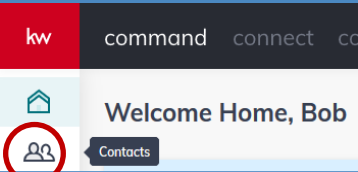


Submit additional transaction & Closing documents for Review to complete your file and get paid.

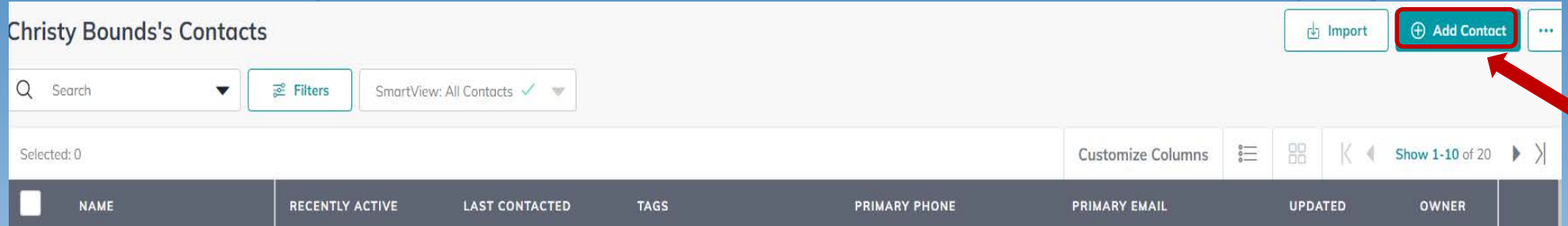
NOTE: Submit commission request as soon as you have an accepted Offer.

Remember, a TC will do all of this for you.

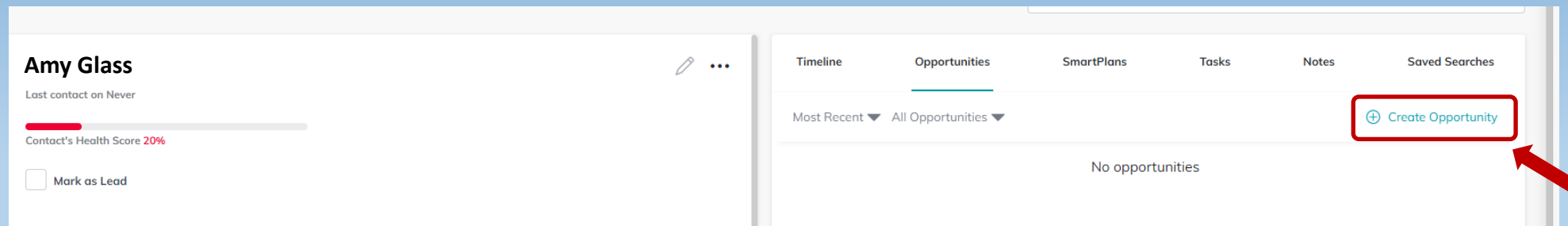
Create Contact, then click “Create Opportunity” for KW Listing [Seller-side only].



1. Click on “Contacts” icon [Must be added as Contact first].
2. This Screen is your list of contacts. Click on “Add Contact” [top right]



3. This Screen shows your client as a Contact in your Command database.



4. Click on “Create Opportunity” at right hand side of screen.

Create Opportunity Screen - Listing

1. Each field with a **red *** must be filled out.
2. "Opportunity Type" - Select "Listing" from drop down list.
3. "Client" – Start typing Client Name in "Client" box.
4. "Owner" means the Agent who "owns" the Contact.
5. "Opportunity Name" – "Listing" will pop up. **VERY IMPORTANT!**

Change to Property Address + Client + Listing.

6. Enter each field with a **red ***
 - Commission Rate – only put listing-side commission.
 - Opportunity Phase [Change to Under Contract]
 - Opportunity Stage [Change to Active]
7. Click on "Create" button at bottom.

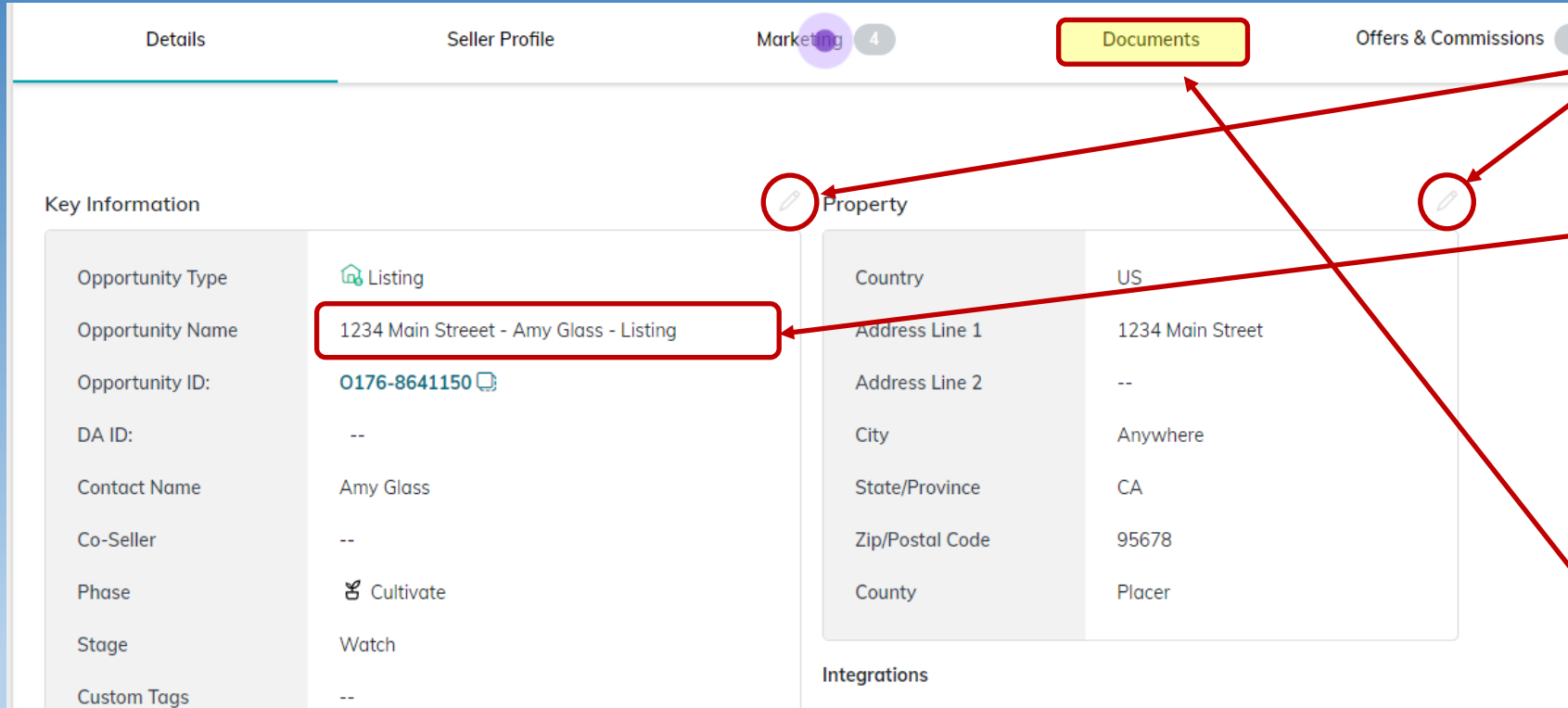
The screenshot shows the 'Create Opportunity' form with the following fields and values:

- Market Center***: Walnut Creek
- Team**: Select a team
- Opportunity Type***: Listing
- Owner***: Christy Bounds
- Client***: Amy Glass
- Co-Seller**: Search...
- Opportunity Name***: 1234 Main Street - Amy Glass - Listing
- Custom tags**: Select tags
- Estimated Closed Date**: [Calendar icon]
- Time Frame**: Select...
- Estimated Listing Price**: \$0.00
- Commission Rate***: 2.5 %
- Opportunity Phase***: Cultivate
- Opportunity Stage***: Watch

At the bottom, there are two buttons: 'Cancel' and 'Create'.

Remember, a TC will do all of this for you.

Opportunity Information Page for Listing Opportunity:



Click Pencil icon in each section to edit.

1. Key Information.

Ensure Opportunity Name is correct.
[Address + Client Name + Listing]

2. Property Information.

Enter Property Information

3. Once Key Information & Property

Information is complete, Click the documents tab to begin uploading documents.

Once an Offer has been accepted, edit General Information.

Edit General Information

Market Center: Walnut Creek

Opportunity Name*: 1234 Main Street - Amy Glass - Listing

Team: [Empty]

Custom tags: Select

Deal Owner: Christy Bounds

Contact name*: Amy Glass

Co-Seller: Search...

Opportunity Phase*: Under Contract

Stage*: Escrow

Time Frame Months: Select

Estimated Closed Date: [Empty]

Appointment Scheduled: [Empty]

Appointment Date: [Empty]

Agreement Won: [Empty]

Contract Date: 8/15/2023

Closed Date: [Empty]

Estimated Listing Price: \$0.00

Buttons: Cancel, Preview, Save

1. Please ensure Opportunity Name is correct. [Address + Client Name + Listing].
2. Click "Save" if all information is correct.

Remember, a TC will do all of this for you.

Start working with Listing “Opportunity” by first selecting Checklist Type

Pick checklist type ▼

- Residential
- Commercial List 0
- Vacant Land L 0
- San Francisco 0

To start work with opportunity please select checklist type first

Note checklist options for Commercial Listing, Vacant Land Listing and San Francisco Listing.

Select Checklist “Event” in Left Column – Listed / Under Contract / Closed

Status: Select...

Residential ▼

Listed

Under Contract

Closed

Listed ▼ 0 of 11 documents uploaded

Add item | Add Comment | Attach multiple files

Submit to MC

STATUS ▼	DOCUMENT ▼	TYPE ▼	FILE ▼
Not uploaded	Exclusive Right to Sell Required	Contract	+ Add a file

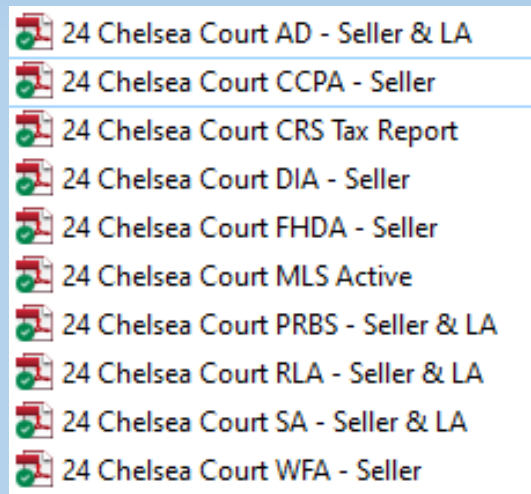
Sync Transaction | Go To Transaction

Remember, a TC will do all of this for you.

Separate PDF documents and label each document.

Separating PDF documents on your Desktop

1. ***The easiest way to do this is to have a “PDF Splitter.”***
 - a. ***You can use Adobe Acrobat Professional – a program which can be purchased.***
 - b. ***You may be able to download a FREE PDF Splitter like “Easy PDF” or similar program.***
2. ***When you label your documents, it is best to name them with the property Address followed by the form Abbreviation and who has signed.***
 - a. ***[123 Main Street AD – Buyer & BA or 123 Main Street RPA – all . . . for example.]***
3. ***Once you have named a document, you then can start to save the next document the same as the previous document, but then just change the “form” part.***
 - a. ***[Start saving as 123 Main Street AD – then change “form” from AD to CCPA.]***
4. ***You will then have file folder on your desktop that looks like this.***



Remember, a TC will do all of this for you.

Upload listing documents to Listed “event.”

Use your Desktop folder with Listing documents, drag and drop documents to Command “Drop your file here.” Once uploaded, they will appear at the right of the document slot.

1345 Singingwood Ct #1 AD - Seller & LA	<input type="checkbox"/>	Uploaded	Required	RLA Residential Listing Agreement – Exclusive / CLA Commercial Listing Agreement	Agreement	rla-fe.pdf
1345 Singingwood Ct #1 AS - Seller	<input type="checkbox"/>	Uploaded	Required	SA Seller Advisory	Disclosure	sa-fe.pdf
1345 Singingwood Ct #1 CCDDA - Seller	<input type="checkbox"/>	Uploaded	Required	WFA Wire Fraud Advisory	Disclosure	wfa-fe.pdf
1345 Singingwood Ct #1 CCPA - Seller	<input type="checkbox"/>	Uploaded	Required	CCPA California Consumer Privacy Act Advisory	Disclosure	ccpa-fe.pdf
1345 Singingwood Ct #1 CRS Tax Report	<input type="checkbox"/>	Uploaded	Required	DIA Disclosure Information Advisory	Disclosure	<input type="text" value="Drop your file here. Browse"/>
1345 Singingwood Ct #1 DIA - Seller	<input type="checkbox"/>	Uploaded	Required	SELM Seller Instruction To Exclude Listing From The MLS / Send to Board	Agreement	<input type="text" value="Drop your file here. Browse"/>
1345 Singingwood Ct #1 EQ Bk Rcpt - Sel...	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 ESD - Seller	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 FHDA - Seller	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 FLD - Seller & LA	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 Home Inspectio...	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 MCA - Seller	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 MLS Active 448K	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 MT Ext and 428K	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 NHD Report	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 PRBS - Seller & ...	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 RCSD-S - Seller ...	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 RLA - Seller & LA	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 Rossmoor Alter...	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 SA - Seller & LA	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 SBSA- Seller & LA	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 TA - Seller & LA	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 WCMD - Seller	<input type="checkbox"/>	Not uploaded	Required			
1345 Singingwood Ct #1 WFA - Seller	<input type="checkbox"/>	Not uploaded	Required			

If already uploaded – shows name.

NOTE: Each “Document slot” should only have the document with that name. Otherwise you may have to generate new “Document slot” that is not on the Checklist – see Exhibit A.

Remember, a TC will do all of this for you.

After uploading Listing documents, click “Submit to MC” for Broker Review.

Click every time you upload documents for review.

The screenshot shows a software interface with tabs for Details, Seller Profile, Documents, Offers & Commissions (1), Notes (0), and Timeline. A red box highlights the 'Resubmit to MC' button, with an arrow pointing to it from the top text. Below the tabs, there's a status dropdown set to 'Select...' and a 'Status: Changed' indicator. A red box highlights the 'Listed' status option in a dropdown menu, with a red arrow pointing to it from the text 'Status' above it. To the right, there's an 'Attach Files From:' dropdown set to 'My Computer (Manual)'. Below this is a table of documents with columns for STATUS, REQUIREMENT, DOCUMENT, TYPE, and FILE. A red arrow points to the 'FILE' column header with the text 'Already uploaded – shows name.'.

STATUS	REQUIREMENT	DOCUMENT	TYPE	FILE
<input type="checkbox"/> Uploaded	Required	AD Agency Disclosure - Buyer & BA	Disclosure	180-corwin-street-5-ad-buyer-and-ba.pdf
<input type="checkbox"/> Uploaded	Required	RLA Residential Listing Agreement – Exclusive / CLA Commercial Listing Agreement	Agreement	rla-fe.pdf
<input type="checkbox"/> Uploaded	Required	SA Seller Advisory	Disclosure	sa-fe.pdf
<input type="checkbox"/> Uploaded	Required	WFA Wire Fraud Advisory	Disclosure	wfa-fe.pdf
<input type="checkbox"/> Uploaded	Required	CCPA California Consumer Privacy Act Advisory	Disclosure	ccpa-fe.pdf

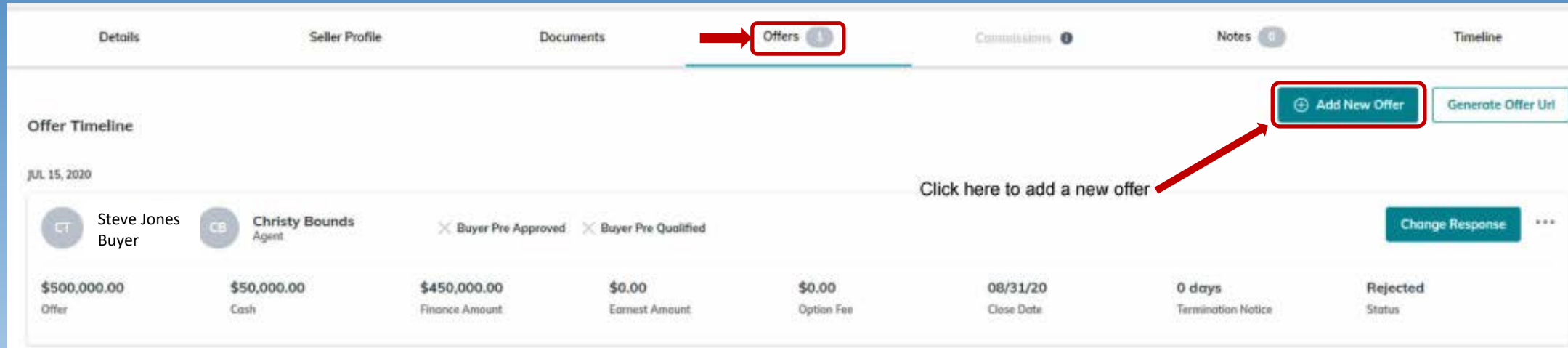
Upload documents to respective “event.”

- Listed
- Under Contract
- Closed

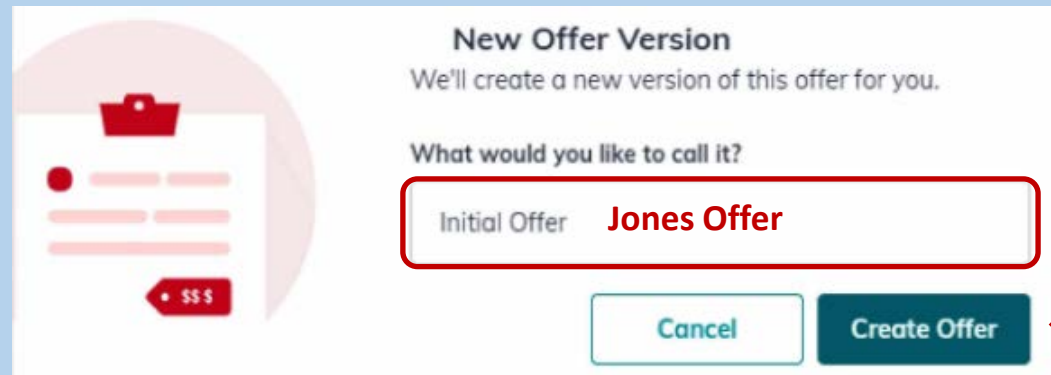
Remember, a TC will do all of this for you.

Steps to accept an Offer on a Listing:

There may be one Offer or several Offers to consider. Click on “Offers” to open “Offer Timeline” page & Click on “Add New Offer” for each Offer being considered.



Create Offers: Change the name of the Offer to “Buyer Last Name” Offer. and Click on “Create Offer” to go to the page to enter details.



Put “Buyer Last Name” Offer
Click “Create Offer” each time.

Remember, a TC will do all of this for you.

Enter Offer Information for each Offer – Details / Parties, etc.

Details Seller Profile Documents Offers 1 Commissions 0 Notes 0 Timeline

Initial Offer

Offer Details Parties Terms Agent Analysis

Offer Details

Version Name

Initial Offer Jones Offer

Offer Date 2/27/2020

Close Date 3/1/2020

Back Parties

Click on “Parties” which opens “Parties” page. Enter Buyer & Buyer Agent Information.

Initial Offer

Offer Details Parties Terms Agent Analysis

Parties

Buyer

Name* Steve Jones

Email

Phone

Seller

Name* Amy Glass

Email JonJovi@gmail.com

Phone

Remember, a TC will do all of this for you.

Agent Analysis:

- Agent can add comments to each Offer. [Pros / Cons / Summary]
- Command enables the Listing Agent to do a side-by-side comparison sheet to send to Seller to help in deciding which Offer to accept.
- For Accepted Offer, just say “Good Offer.”

Details Seller Profile Documents Offers (1) Commissions (0)

Initial Offer

Offer Details Parties Terms Agent Analysis

Pros

Cons

Good **Good Offer**

Summary

Back Save

Compare offers ←

Drag and arrange offers to compare and send

	Steve Jones	Paul
Sales Price	\$252,132.00	\$202,000.00
Cash	\$10.00	\$20,000.00
Finance Amount	\$252,122.00	\$182,000.00
Earnest Money	\$0.00	\$2,020.00
Option Fee	\$0.00	\$200.00
Termination Notice	0 days	0 days
Offer Date	02/04/20	02/27/20
Closing Date	02/07/20	03/01/20
Summary +		Summary
Pros +		Good
Cons +		Bad
Pre-approved		
Pre-qualified		

Remember, a TC will do all of this for you.

Steps to accept an Offer on a Listing continued:

Click on the Offer you are accepting.

Details Seller Profile Documents **Offers 2** Commissions 1 Notes 0 Timeline

Offer Timeline

Select All

JUL 16, 2020

TE Test Buyer **TE** Test Agent Buyer Pre Approved Buyer Pre Qualified **Accept** **Reject** ...

\$460,000.00 Offer **\$20,000.00** Cash **\$440,000.00** Finance Amount **\$0.00** Earnest Amount **\$0.00** Option Fee **08/31/20** Close Date **0 days** Termination Notice **Reviewing** Status

JUL 15, 2020

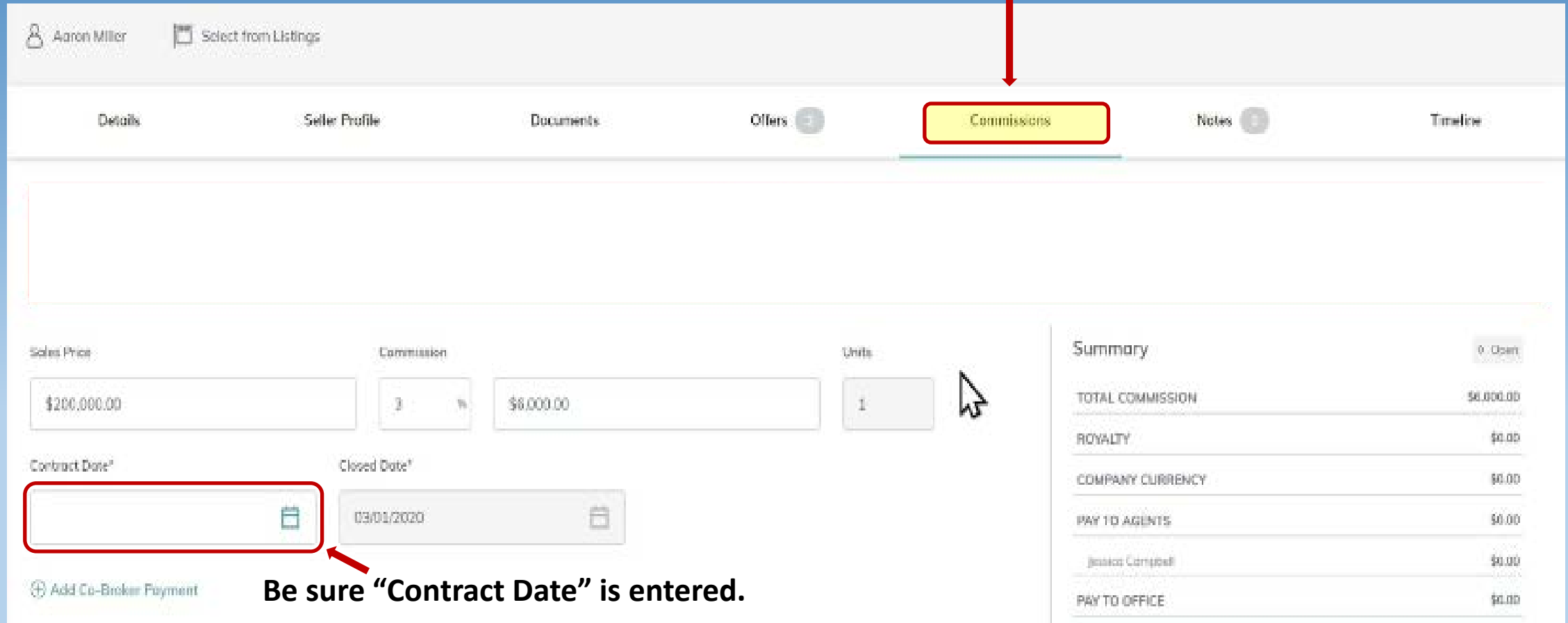
CT Steve Jones Buyer **CB** Christy Bounds Agent Buyer Pre Approved Buyer Pre Qualified **Accept** **Reject** ...

\$500,000.00 Offer **\$50,000.00** Cash **\$450,000.00** Finance Amount **\$0.00** Earnest Amount **\$0.00** Option Fee **08/31/20** Close Date **0 days** Termination Notice **Reviewing** Status

This is the Offer being accepted. →

Once an Offer has been accepted, the Commission function will be enabled.

Click on the Commission tab in top banner.



The screenshot shows a software interface for managing real estate transactions. At the top, there is a user profile for 'Aaron Miller' and a 'Select from Listings' button. Below this is a navigation banner with several tabs: 'Details', 'Seller Profile', 'Documents', 'Offers' (with a dropdown arrow), 'Commissions' (highlighted with a red box and an arrow pointing to it from the text above), 'Notes' (with a dropdown arrow), and 'Timeline'. The main content area is divided into two sections. The left section contains input fields for 'Sales Price' (set to \$200,000.00), 'Commission' (set to 3%), and 'Units' (set to 1). Below these are 'Contract Date' and 'Closed Date' fields. The 'Contract Date' field is highlighted with a red box and an arrow pointing to it from the text 'Be sure "Contract Date" is entered.' The 'Closed Date' field is set to 03/01/2020. The right section is titled 'Summary' and shows a table of financial details:

Summary		0 Open
TOTAL COMMISSION	\$0,000.00	
ROYALTY	\$0.00	
COMPANY CURRENCY	\$0.00	
PAY TO AGENTS	\$0.00	
(Jessica Campbell)	\$0.00	
PAY TO OFFICE	\$0.00	

Be sure "Contract Date" is entered.

Remember, a TC will do all of this for you.

Working with Commissions continued:

Edit Lead Agent Payment Screen

1. “Agent Units” - Each transaction equals 1 unit.

- If there is a co-agent, then it would be .50 unit.

2. “Calculate Commissions” – Click so MCA sees figures.

3. “Additional Deductions” – MCA does these. Don’t enter anything.

4. “Add Item” – Click on “Edit Agent Payment”, then “Add Item” to add TC Fee or Referral Fee.

PLEASE NOTE – You also use the “Add Item” button to enter a Referral that the Agent may be paying which is an additional deduction form Agent’s Commission.

5. “Save Changes” – Always click at bottom right of screen.

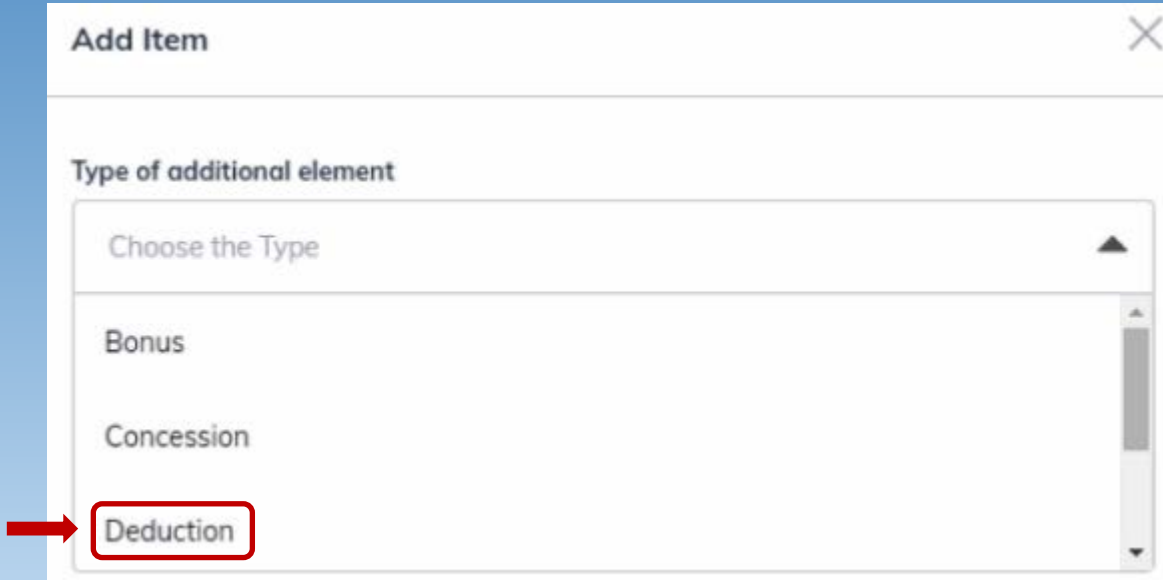
The screenshot shows the 'Edit Agent Payment' interface. At the top, there are two input fields: 'Agent Units*' with the value '1' and 'Agent Gross Commission*' with the value '\$11,500.00'. Below these is a 'Calculate Commission' button. The main section contains a list of deductions: 'Associate Royalty' (-\$690.00), 'Company Commission' (-\$2,300.00), and 'Additional Deductions' (-\$0.00). Under 'Additional Deductions', there are four rows: 'E&O' (\$0.00), 'KW Cares' (\$0.00), 'KW Kids Can' (\$0.00), and 'BOLD Scholarship' (\$0.00). Below this is the 'Net to Agent' amount of \$8,510.00. At the bottom, there is an 'Extra Payment Options' section with a sub-label 'Referrals, Bonuses, Deductions, Concessions' and an 'Add Item' button. At the very bottom are 'Cancel' and 'Save Changes' buttons.

Item	Amount
Agent Units*	1
Agent Gross Commission*	\$11,500.00
Associate Royalty	-\$690.00
Rate	6.0%
Split	100.0%
Company Commission	-\$2,300.00
Split	20.0%
Additional Deductions	-\$0.00
E&O	\$0.00
KW Cares	\$0.00
KW Kids Can	\$0.00
BOLD Scholarship	\$0.00
Net to Agent	\$8,510.00

Working with Commissions continued [Submit TC Fee]:

1. "Add Item" Screen

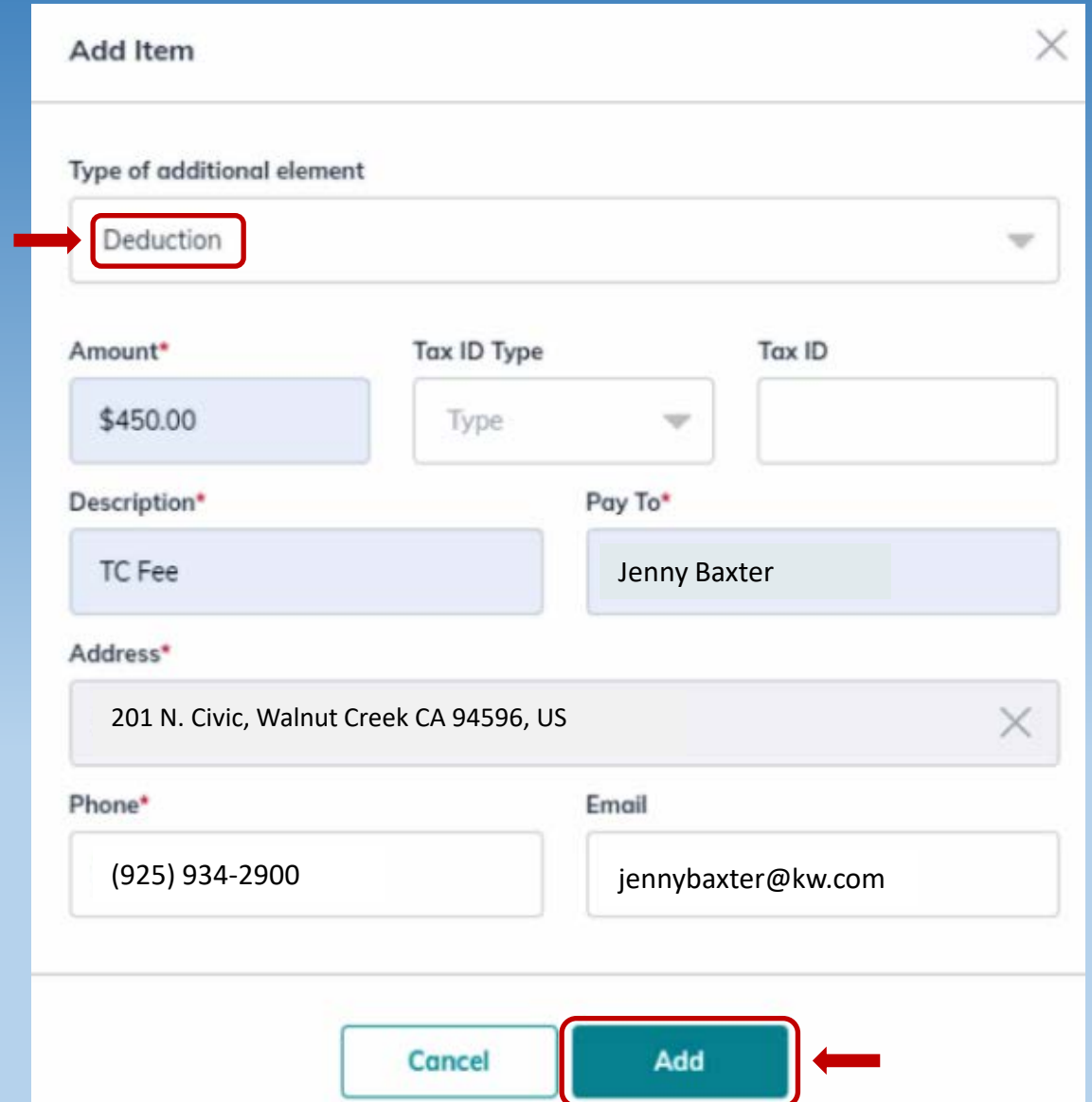
- Click "Deduction" to enter TC Fee.



The screenshot shows the 'Add Item' dialog box. The 'Type of additional element' dropdown menu is open, displaying a list of options: 'Choose the Type', 'Bonus', 'Concession', and 'Deduction'. A red arrow points to the 'Deduction' option, which is highlighted with a red box.

2. "Add Item" Screen.

- Select "Deduction"
- Enter TC details
- Click "Add" button to Save



The screenshot shows the 'Add Item' dialog box with the following details filled in:

- Type of additional element:** Deduction (highlighted with a red box and arrow)
- Amount*:** \$450.00
- Tax ID Type:** Type
- Tax ID:** (empty)
- Description*:** TC Fee
- Pay To*:** Jenny Baxter
- Address*:** 201 N. Civic, Walnut Creek CA 94596, US
- Phone*:** (925) 934-2900
- Email:** jennybaxter@kw.com

At the bottom, the 'Add' button is highlighted with a red box and arrow, and the 'Cancel' button is visible to its left.

Remember, a TC will do all of this for you.

Working with Commissions continued [Submit Referral Fee]

1.

Adding an Outside Referral Fee to Commissions

Edit Agent Payment

Agent Units* 1 Agent Gross Commission* \$21,625.00

Calculate Commission

Associate Royalty -\$0.00

Rate 6.0%

Split 100.0%

Company Commission -\$4,325.00

Split 20.0%

Additional Deductions -\$0.00

E&O \$0.00

BOLD Scholarship \$0.00

Nonprofit Deductions -\$0.00

KW Cares \$0.00

KW Kids Can \$0.00

Net to Agent \$17,300.00

Extra Payment Options Referrals, Bonuses, Deductions, Concessions

+ Add item

1. Click on “Edit Agent Payment” & “Add Item.”
2. Select “Outside Referral.”
3. Enter Referral Information.
4. Click “Save.”

Add Item

Type of additional element

Choose the Type

Deduction

Inside Referral

Outside Referral

Add Item

Type of additional element

Outside Referral

Referral Percentage* 0% Amount* \$0.00

BROKERAGE DETAILS

Representative Name* Select...

Phone* Ext. Type* Select...

Email

Company Name/DBA* Select...

Tax ID Type* Tax ID Number* EIN SSN

Office/Branch Nickname*

Legal Name*

Cancel **Save**

1.

2.

3.

4.

Remember, a TC will do all of this for you.

Working with Commissions – Add Another Agent [Co-Agent]:

- To add Co-Agent, 1st change “Agent Units” to .5 [50%/50% split] > Click on “Add Another Agent”
- Once everything is correct, click on **Submit**. NOTE: “Alerts” display under “Submit” button if not done correctly.

Offers & Commissions / Manage Commission

General Information

Sales Price	Commission Rate	Total Commission	Total Units	Contract Date*
\$500,000.00	2.5%	\$12,500.00	1.0	08/15/23

Payment [+ Add Another Agent](#) [+ Add Co-Broker Payment](#)

Christy Bounds

Agent Units	Agent Gross Commission	Net Pay to Agent	Payment date
0.5	\$6,250.00	\$4,075.00	09/29/23

Summary

Total Commission	\$12,500.00
Pay to Office	\$1,625.00
Associate Royalty	\$375.00
Company Commission	\$1,250.00
Additional Deductions	\$0.00
Nonprofit Deductions	\$0.00
Pay to Agents	\$4,075.00
Christy Bounds	\$4,075.00
Other Deductions	\$550.00

Alerts

- ⚠ Remaining Agent Commission Balance: \$6,250.00
- Total agent commissions do not equal the total commission for the opportunity.
- ⚠ Remaining Unit Balance: 0.500 Unit
- Agent unit values must total to 1.0

Submit

Alerts will disappear once you have added the co-agent information.

Remember, a TC will do all of this for you.

On “Add Another Agent” page:

1. Enter Co-Agent name
2. Change “Agent Units” to .5 [Units to total 1]
3. Click “Calculate Commission” for automatic adjustment.
4. Add any Additional Deductions for Co-Agent
 - Use dollar figures
5. Click “Save Changes”

The screenshot shows the 'Add Another Agent' form with the following fields and values:

- Agent Name***: Margot Poss
- Agent Units***: 0.5
- Agent Gross Commission***: \$5,750.00
- Calculate Commission**: A button with a refresh icon, highlighted with a red box and arrow.
- Associate Royalty**: -\$0.00
 - Rate: 0%
 - Split: 0%
- Company Commission**: -\$0.00
 - Split: 0%
- Additional Deductions**: -\$0.00
 - E&O: \$0.00
 - KW Cares: \$0.00
 - KW Kids Can: \$0.00
 - BOLD Scholarship: \$0.00
- Net to Agent**: \$0.00

At the bottom, there are two buttons: **Cancel** and **Save Changes**. The **Save Changes** button is highlighted with a red box and arrow.

Remember, a TC will do all of this for you.

Review “Commission” page

1. Click “Add Note” to add any note you would like the MCA to see.
 - Title Company, Escrow Officer, Escrow # and Officer email address
 - Perhaps mention that there is a Referral at ___% so MCA can change figures.
2. If numbers are correct, click “Submit.”

General Information [Edit General Information](#)

Sales Price	Commission Rate	Total Commission	Total Units
\$460,000.00	2.5%	\$11,500.00	1.0
Contract Date*	Closed Date*		
07/15/20	08/31/20		

Payment [Add Another Agent](#) [Add Co-Broker Payment](#)

Christy Bounds [Edit Agent Payment](#)

Agent Units	Agent Gross Commission	Net Pay to Agent	Payment date
0.5	\$5,750.00	\$3,805.00	08/31/20

PAYMENT BREAKDOWN

Agent Gross Commission	\$5,750.00
Associate Royalty	-\$345.00
Company Commission	-\$1,150.00
Additional Deductions	-\$450.00

Summary [Open](#)

Total Commission	\$11,500.00
Pay to Office	\$1,494.99
Associate Royalty	\$345.00
Company Commission	\$1,150.00
Additional Deductions	\$0.00
Pay to Agents	\$9,555.01
Christy Bounds	\$3,805.00
Margot Poss	\$5,750.01
Other Deductions	\$450.00

Note to include: Title Company, Escrow Officer, Escrow # and Officer email address and any referral information.

Be sure to click to Add Note to MCA.

Submit Commission
If numbers are correct and you have added Note to MCA, click “Submit.”

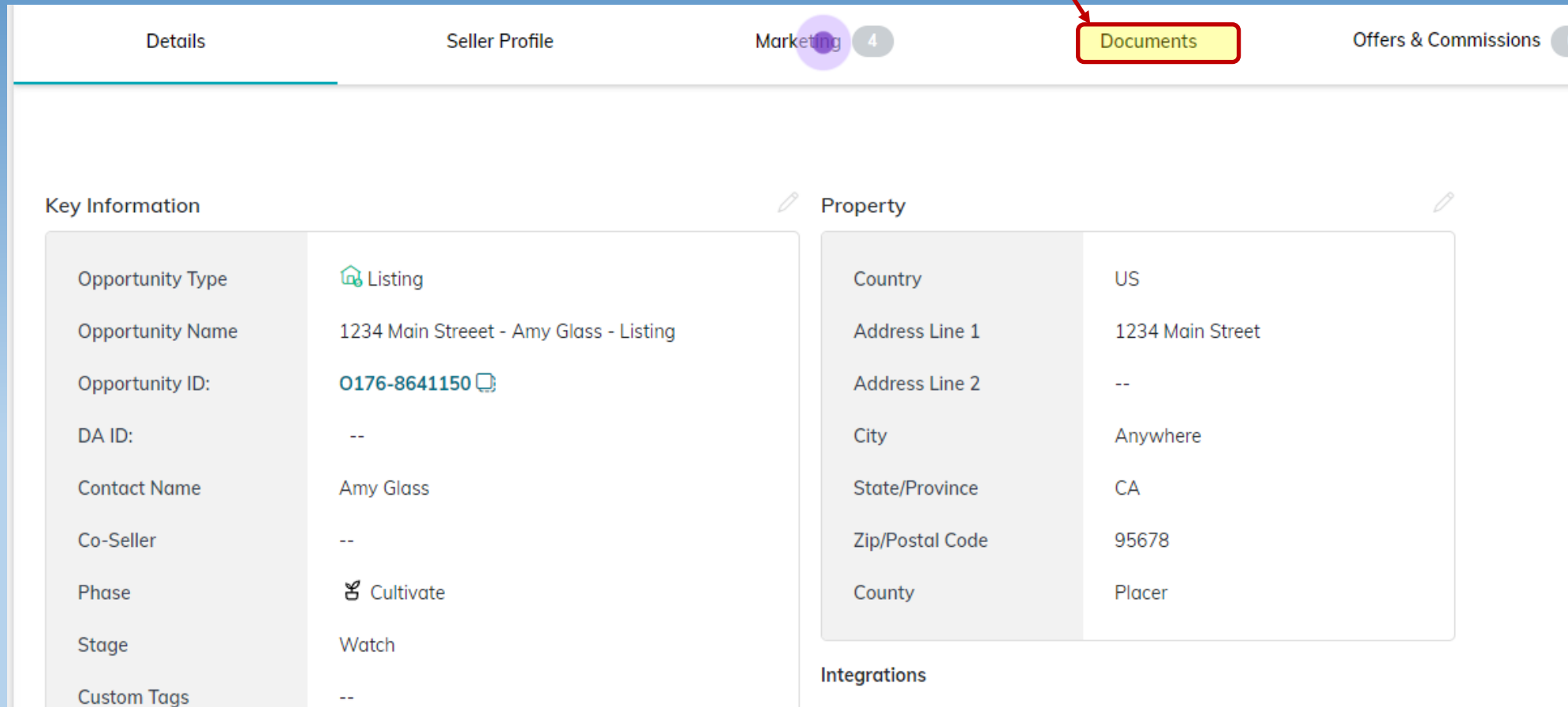
Remember, a TC will do all of this for you.

Review Commission Details

GROSS COMMISSION	\$10,000.00
<hr/>	
ROYALTY	-\$600.00
<hr/>	
Associate Royalty	\$600.00
Rate	6%
Split	100%
<hr/>	
COMPANY COMMISSION	-\$2,000.00
<hr/>	
Company Commission	\$2,000.00
Split	20%
<hr/>	
DEDUCTIONS	-\$500.00
<hr/>	
E&O	\$0.00
KW Cares	\$0.00
KW Kids Can	\$0.00
BOLD Scholarship	\$0.00
▶ Keller Williams Realty - Office fee	\$50.00
▶ Transaction co-ordinator	\$375.00
▶ Keller Williams Realty - TC	\$75.00
<hr/>	
CHECK AMOUNT	\$6,900.00




Remember, a TC will do all of this for you.

Review Offer Details, then Click the “Documents” tab:



The screenshot shows a web application interface with a navigation bar at the top. The navigation bar contains five tabs: "Details", "Seller Profile", "Marketing" (with a purple circle and a grey badge containing the number "4"), "Documents" (highlighted with a red box and a red arrow pointing to it from the text above), and "Offers & Commissions" (with a grey badge containing the number "0").

Below the navigation bar, the main content area is divided into two columns. The left column is titled "Key Information" and contains a table with the following data:

Field	Value
Opportunity Type	 Listing
Opportunity Name	1234 Main Street - Amy Glass - Listing
Opportunity ID:	0176-8641150 
DA ID:	--
Contact Name	Amy Glass
Co-Seller	--
Phase	 Cultivate
Stage	Watch
Custom Tags	--

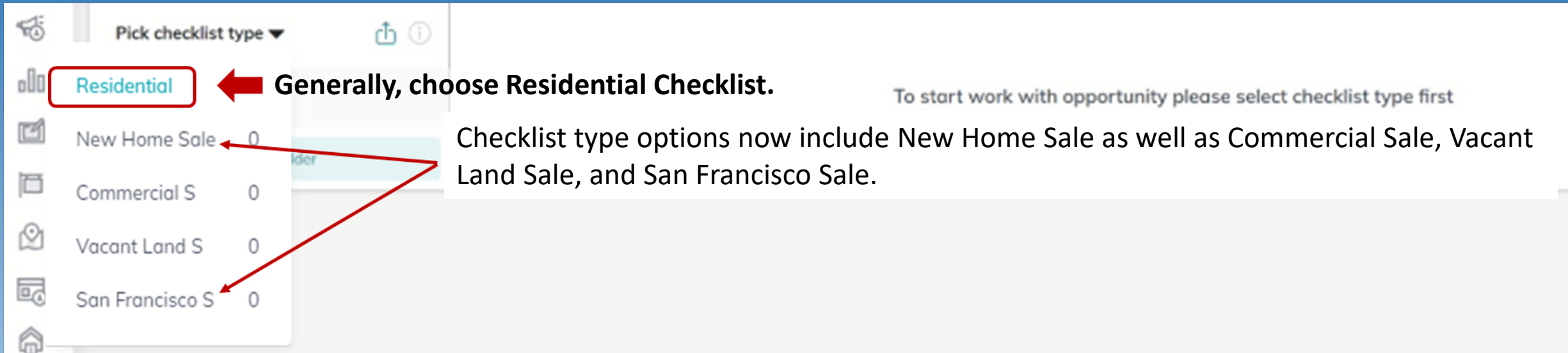
The right column is titled "Property" and contains a table with the following data:

Field	Value
Country	US
Address Line 1	1234 Main Street
Address Line 2	--
City	Anywhere
State/Province	CA
Zip/Postal Code	95678
County	Placer

Below the "Property" table, there is a section titled "Integrations" which is currently empty.

Remember, a TC will do all of this for you.

Start working with Buyer “Opportunity” by first selecting Checklist Type

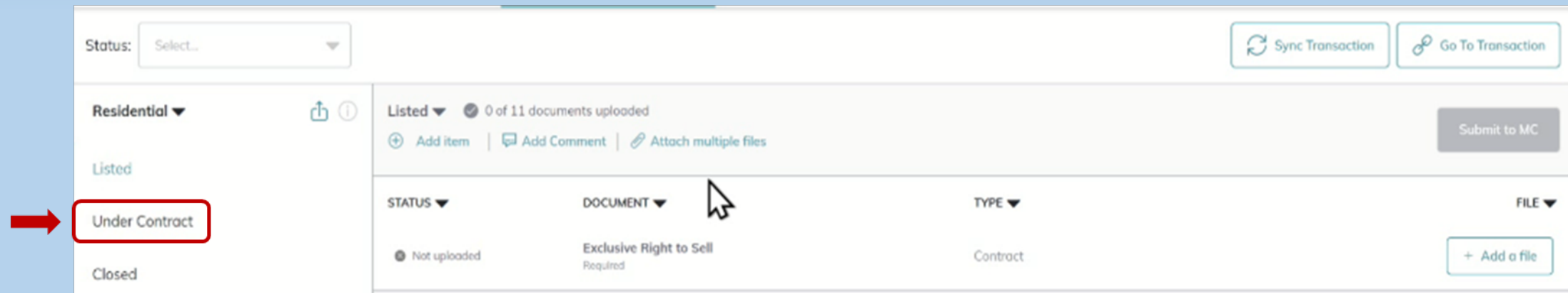


Residential ← **Generally, choose Residential Checklist.**

To start work with opportunity please select checklist type first

Checklist type options now include New Home Sale as well as Commercial Sale, Vacant Land Sale, and San Francisco Sale.

Select Checklist “Event” in Left Column – Listed / Under Contract / Closed



Status: Select... Sync Transaction Go To Transaction

Residential Listed Under Contract Closed

Listed 0 of 11 documents uploaded Submit to MC

Add item Add Comment Attach multiple files

STATUS	DOCUMENT	TYPE	FILE
Not uploaded	Exclusive Right to Sell Required	Contract	+ Add a file

Remember, a TC will do all of this for you.

Upload purchase documents to Under contract “event.”

Use your Desktop folder with Purchase documents, drag and drop documents to Command “Drop your file here.” Once uploaded, they will appear at the right of the document slot. Click Submit to MC.

The screenshot shows a software interface for document management. On the left is a list of document categories for '180 Corwin Street #5'. The main area is divided into sections for 'San Francisco' and 'Under Contract'. The 'Under Contract' section is highlighted with a red box. Below it, a table lists various requirements and their corresponding documents. A red arrow points from the 'Resubmit to MC' button to the 'Drop your file here' area. Another red arrow points from the 'AD Agency Disclosure - Buyer & BA Disclosure' row to the table.

STATUS	REQUIREMENT	DOCUMENT	TYPE	FILE
Uploaded	Required	AD Agency Disclosure - Buyer & BA	Disclosure	Drop your file here. Browse
Approved	Required	FHDA Fair Housing & Discrimination Advisory	Disclosure	180-corwin-street-5-fhda-all.pdf
Approved	Required	PRBS Possible Representation of More Than One Buyer or Seller - Disclosure & Consent	Disclosure	180-corwin-street-5-prbs-buyer-and-ba.pdf
Approved	Required	RPA [16 pages] or SF RPA / RIPA / CPA / NCPA	Agreement	180-corwin-street-5-sf-rpa-all.pdf
Approved	Required	BIA Buyer Investigation Advisory	Disclosure	180-corwin-street-5-bia-buyer.pdf
Approved	Required	WFA Wire Fraud Advisory	Disclosure	180-corwin-street-5-wfa-buyer.pdf
Approved	Required	CCPA California Consumer Privacy Act Advisory	Disclosure	180-corwin-street-5-ccpa-buyer.pdf

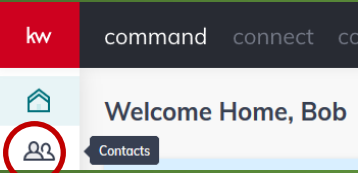
NOTE: Each “Document slot” should only have the document with that name. Otherwise you may have to generate new “Document slot” that is not on the Checklist – see Exhibit A.

Remember, a TC will do all of this for you.

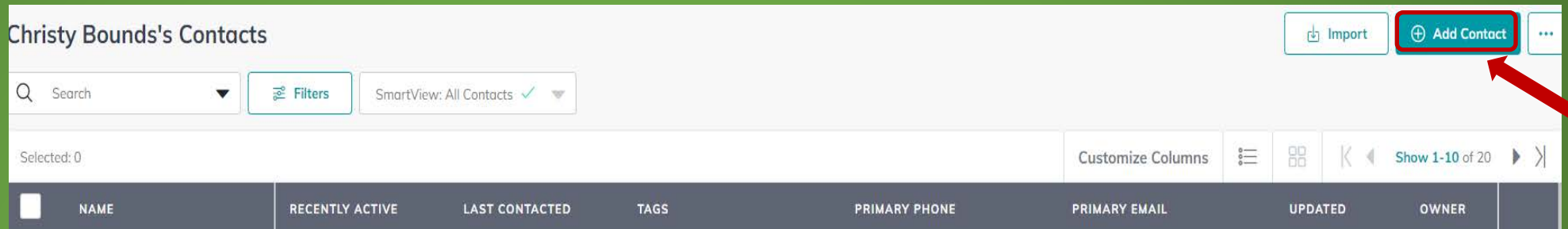
If a dual-agency Offer, there needs to be 2 separate Opportunities.

1. Same Agent represents both Seller & Buyer
 - a. Listing-side Opportunity – upload all documents to this Opportunity
 - b. Buyer-side Opportunity – Agent uploads only the dual-agency placeholder [FAQ Site]
2. Two separate Agents from same Market Center represent both Seller & Buyer
 - a. Listing-side Opportunity – Listing Agent uploads all documents to Listing Opportunity
 - b. Buyer-side Opportunity – Buyer's Agent upload all documents separately.

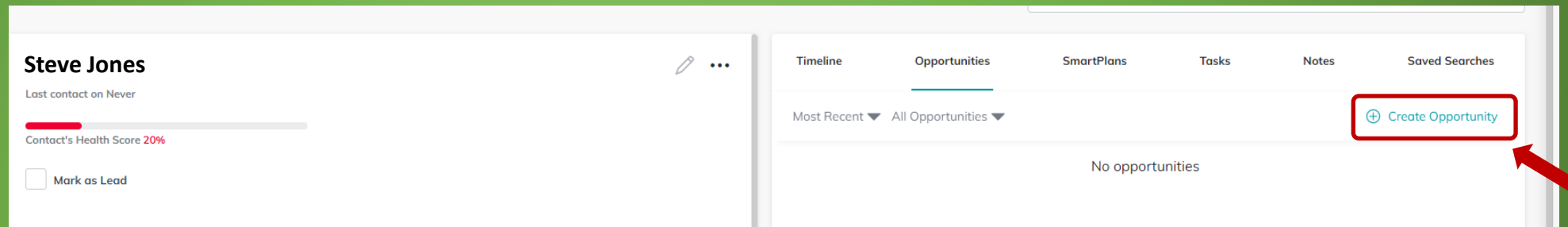
Create Opportunity for KW Buyer Sale [Buyer-side only]



1. Click on “Contacts” icon [Must be added as Contact first].
2. This Screen is your list of contacts. Click on “Add Contact” [top right]



3. This Screen shows your client as a Contact in your Command database.



4. Click on “Create Opportunity” at right hand side of screen.

Create Opportunity Screen - Buyer

1. Each field with a **red *** must be filled out.
2. "Opportunity Type" - Select "Buyer" from drop down list.
3. "Client" – Start typing Client Name in "Client" box.
4. "Owner" means the Agent who "owns" the Contact.
5. "Opportunity Name" – "Buyer" will pop up. **VERY IMPORTANT!**
 - Change to Property Address + Client + Buyer.
6. Enter each field with a **red ***
 - Commission Rate – only put Buyer-side commission.
 - Opportunity Phase [Change to Under Contract]
 - Opportunity Stage [Change to Active]
7. Click on "Create" button at bottom.

The screenshot shows the 'Create Opportunity' form with the following fields and values:

- Market Center***: Walnut Creek
- Team**: Select a team
- Opportunity Type***: Buyer
- Owner***: Christy Bounds
- Client***: Steve Jones
- Co-Buyer**: Search...
- Opportunity Name***: 4321 Front Street - Steve Jones - Buyer
- Custom tags**: Select tags
- Estimated Closed Date**: [Calendar icon]
- Time Frame**: Select...
- Budget**: \$0.00
- Commission Rate***: 2.5%
- Opportunity Phase***: Cultivate
- Opportunity Stage***: Watch

At the bottom, there are two buttons: 'Cancel' and 'Create'.

Red boxes and arrows highlight the following fields: Opportunity Type, Client, Co-Buyer, Opportunity Name, Commission Rate, Opportunity Phase, Opportunity Stage, and the Create button.

Remember, a TC will do all of this for you.

Opportunity Information Page for Buyer:

Details Seller Profile Marketing 4 Documents Offers & Commissions 0

Key Information

Opportunity Type	Listing
Opportunity Name	4321 Front Street – Buyer – Steve Jones
Opportunity ID:	0176-8641150
DA ID:	--
Contact Name	Steve Jones
Co-Seller	--
Phase	Cultivate
Stage	Watch
Custom Tags	--

Property

Country	US
Address Line 1	1234 Main Street
Address Line 2	--
City	Anywhere
State/Province	CA
Zip/Postal Code	95678
County	Placer

Integrations

Click Pencil icon in each section to edit.

1. Key Information.

Ensure Opportunity Name is correct.
[Address + Client Name + Listing]

2. Property Information.

Enter Property Information

3. Once Key Information & Property

Information is complete, Click the documents tab to begin uploading documents.

Edit General Information ✕

Market Center: Walnut Creek

Opportunity Name*: 4321 Front Street – Buyer – Steve Jones

Team: [Empty]

Custom tags: Select

Deal Owner: Christy Bounds

Contact name*: Amy Glass

Co-Seller: Search...

Opportunity Phase*: Under Contract

Stage*: Escrow

Time Frame Months: Select

Estimated Closed Date: [Empty]

Appointment Scheduled: [Empty]

Appointment Date: [Empty]

Agreement Won: [Empty]

Contract Date: 8/15/2023

Closed Date: [Empty]

Estimated Listing Price: \$0.00

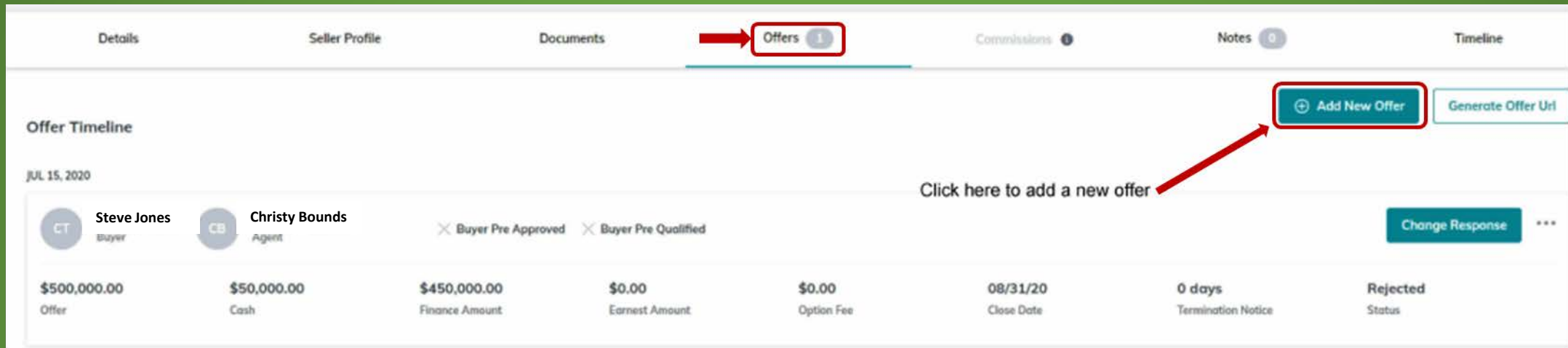
Buttons: Cancel, Preview, Save

1. Please ensure Opportunity Name is correct. [Address + Client Name + Listing].
2. Click “Save” if all information is correct.

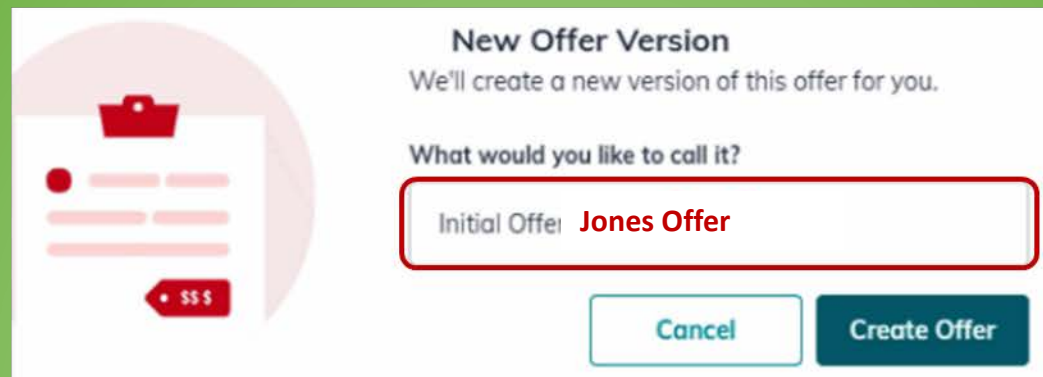
Remember, a TC will do all of this for you.

Steps to accept an Offer [Buyer-side only]:

Click on “Offers” to open “Offer Timeline” page & Click on “Add New Offer.”



Create Offers: Change the name of the Offer to “Buyer Last Name” Offer. and Click on “Create Offer” to go to the page to enter details.



Put “Buyer Last Name” Offer

Click “Create Offer” each time.

Remember, a TC will do all of this for you.

Enter Offer Information for Buyer Offer – Details / Parties, etc.

Offer Jones

Offer Details Parties Terms Agent Analysis

Offer Details

Version Name
Offer Jones

Offer Date: 8/15/2023 Closed Date: 9/29/2023

Property [Select from KWLS](#)

Address: 4321 Front Street, Rocklin, CA, 95677, US

[Back](#) [Parties >](#)

Click on “Parties” which opens “Parties” page.

Enter Buyer & Buyer Agent Information.

Offer Jones

Offer Details Parties Terms Agent Analysis

Parties

Buyer	Seller
Name* Steve Jones	Name* Matt Smith
Email [Empty]	Email [Empty]
Phone [Empty]	Phone [Empty]
Fax [Empty]	Fax [Empty]
Address [Empty]	Address [Empty]

Remember, a TC will do all of this for you.

Agent Analysis:

- Agent can add comments for the Offer [Pros, Cons, Summary].
- You can just say “Good Offer.”

The screenshot shows a web interface for an 'Initial Offer'. At the top, there are navigation tabs: 'Details', 'Seller Profile', 'Documents', 'Offers' (with a '1' notification), and 'Commissions' (with a '1' notification). Below the tabs is a progress bar with four steps: 'Offer Details', 'Parties', 'Terms', and 'Agent Analysis'. The 'Agent Analysis' section is active and contains three text input fields: 'Pros', 'Cons', and 'Summary'. The 'Pros' field contains the text 'Good Offer', which is highlighted with a red rectangular box. A red arrow points from the top-left corner of the slide towards this box. At the bottom left of the form is a 'Back' button, and at the bottom right is a 'Save' button.

Remember, a TC will do all of this for you.

Steps to accept an Offer [Buyer-side only]:

Click on the Offer to accept it.

Offer Timeline

Select All

JUL 16, 2020

TE Steve Jones Buyer TE Christy Bounds Agent X Buyer Pre Approved X Buyer Pre Qualified

This is the Offer being accepted. → **Accept** Reject ...

\$460,000.00	\$20,000.00	\$440,000.00	\$0.00	\$0.00	08/31/20	0 days	Reviewing
Offer	Cash	Finance Amount	Earnest Amount	Option Fee	Close Date	Termination Notice	Status

Remember, a TC will do all of this for you.

Once an Offer has been accepted, the Commission function will be enabled.

Click on the Commission tab in top banner.

The screenshot shows a software interface for managing real estate transactions. At the top, there is a user profile for 'Aaron Miller' and a 'Select from Listings' button. Below this is a navigation banner with tabs: 'Details', 'Seller Profile', 'Documents', 'Offers', 'Commissions', 'Notes', and 'Timeline'. The 'Commissions' tab is highlighted in yellow, and a red arrow points to it from the text above. Below the banner, there are several input fields: 'Sales Price' (set to \$200,000.00), 'Commission' (set to 2%), 'Units' (set to 1), 'Contract Date' (empty, highlighted with a red box), and 'Closed Date' (set to 09/01/2020). A red arrow points from the text 'Be sure "Contract Date" is entered.' to the 'Contract Date' field. On the right side, there is a 'Summary' table with the following data:

Summary		0 Open
TOTAL COMMISSION	\$0,000.00	
ROYALTY	\$0.00	
COMPANY CURRENCY	\$0.00	
PAY TO AGENTS	\$0.00	
Jessica Campbell	\$0.00	
PAY TO OFFICE	\$0.00	

Be sure "Contract Date" is entered.

Remember, a TC will do all of this for you.

Working with Commissions continued:

Edit Lead Agent Payment Screen

1. "Agent Units" - Each transaction equals 1 unit.
 - If there is a co-agent, then it would be .50 unit.
2. "Calculate Commissions" – Click so MCA sees figures.
3. "Additional Deductions" – MCA does these. Don't enter anything.
4. "Add Item" – Click on "Edit Agent Payment", then "Add Item" to add TC Fee or Referral Fee.

PLEASE NOTE – You also use the "Add Item" button to enter a Referral that the Agent may be paying which is an additional deduction form Agent's Commission.

5. "Save Changes" – Always click at bottom right of screen.

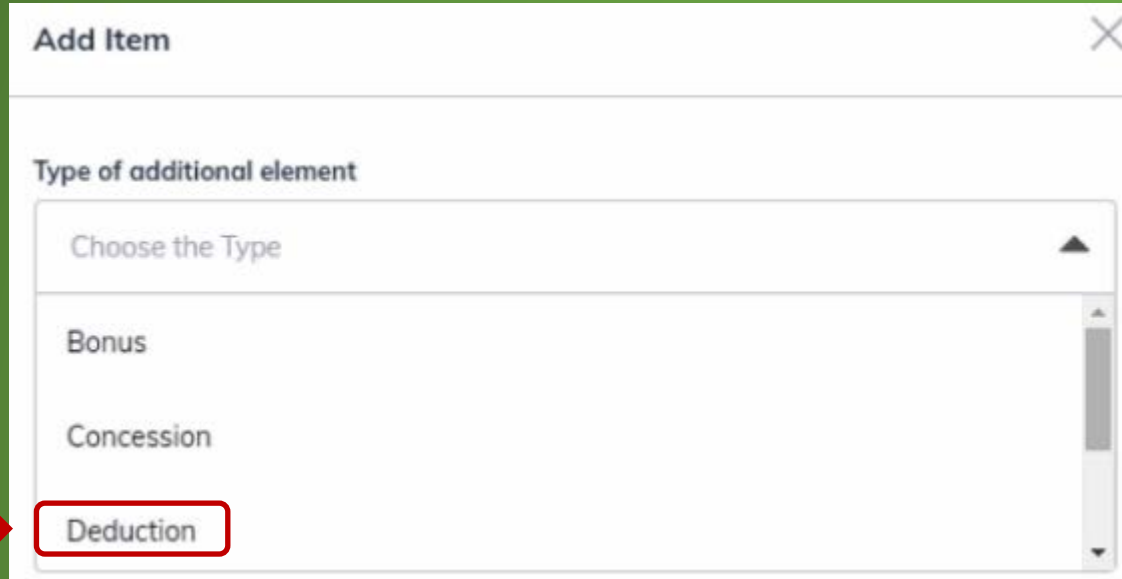
The screenshot shows the 'Edit Agent Payment' interface. At the top, there are two input fields: 'Agent Units*' with the value '1' and 'Agent Gross Commission*' with the value '\$11,500.00'. Below these is a 'Calculate Commission' button. The main section contains a list of deductions: 'Associate Royalty' (-\$690.00), 'Company Commission' (-\$2,300.00), and 'Additional Deductions' (-\$0.00). Under 'Additional Deductions', there are four items: 'E&O' (\$0.00), 'KW Cares' (\$0.00), 'KW Kids Can' (\$0.00), and 'BOLD Scholarship' (\$0.00). Below this is the 'Net to Agent' amount of \$8,510.00. At the bottom, there are 'Extra Payment Options' (Referrals, Bonuses, Deductions, Concessions) and an 'Add Item' button. At the very bottom are 'Cancel' and 'Save Changes' buttons.

Item	Amount
Agent Units*	1
Agent Gross Commission*	\$11,500.00
Associate Royalty	-\$690.00
Rate	6.0%
Split	100.0%
Company Commission	-\$2,300.00
Split	20.0%
Additional Deductions	-\$0.00
E&O	\$0.00
KW Cares	\$0.00
KW Kids Can	\$0.00
BOLD Scholarship	\$0.00
Net to Agent	\$8,510.00

Working with Commissions continued [Submit TC Fee]:

1. "Add Item" Screen

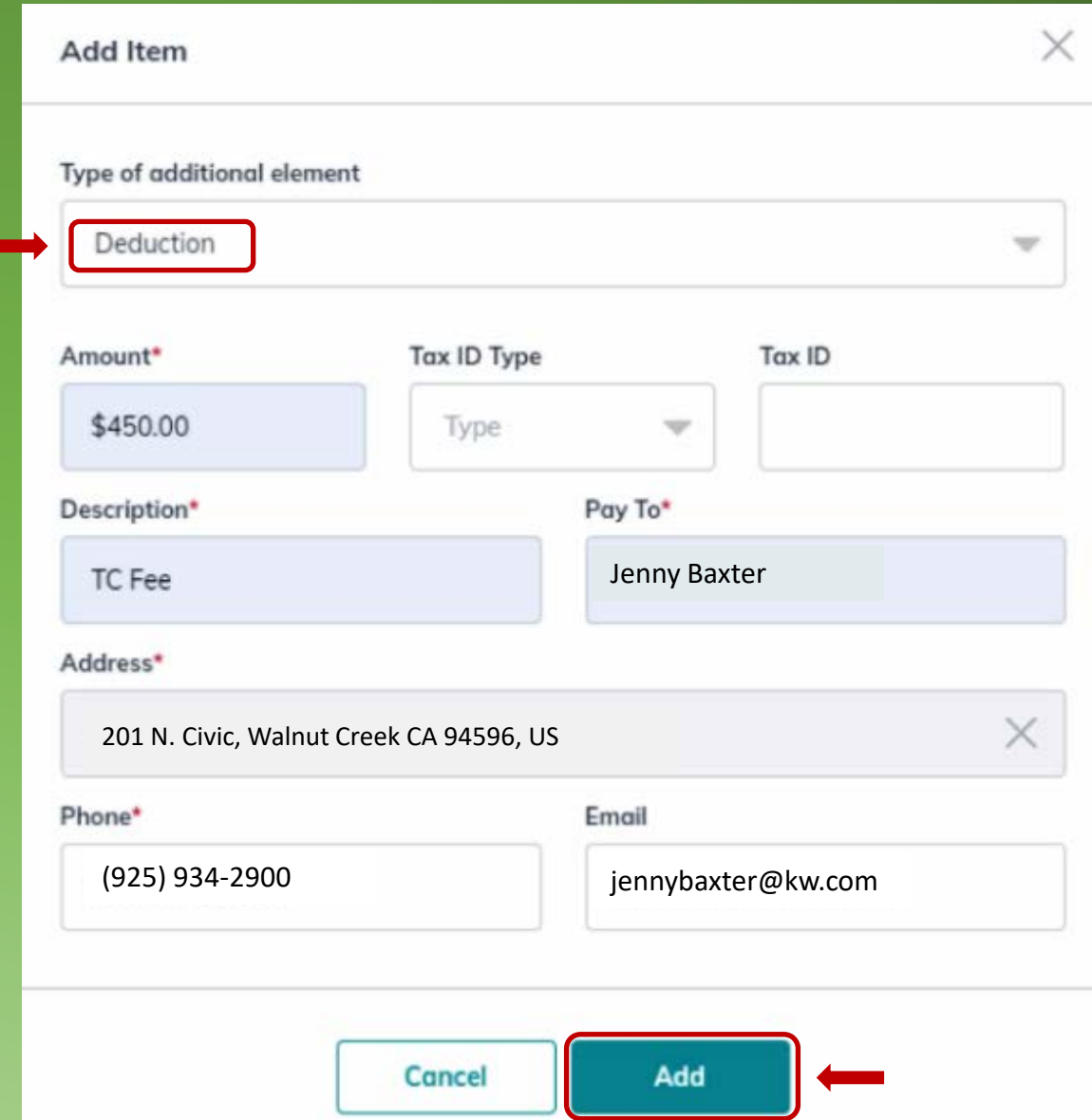
- Click "Deduction" to enter TC Fee.



The screenshot shows the 'Add Item' dialog box. The 'Type of additional element' dropdown menu is open, displaying options: 'Choose the Type', 'Bonus', 'Concession', and 'Deduction'. The 'Deduction' option is highlighted with a red box and a red arrow pointing to it from the left.

2. "Add Item" Screen.

- Select "Deduction"
- Enter TC details
- Click "Add" button to Save



The screenshot shows the 'Add Item' dialog box with the following details filled in:

- Type of additional element:** Deduction (highlighted with a red box and a red arrow pointing to it from the left)
- Amount*:** \$450.00
- Tax ID Type:** Type
- Tax ID:** (empty)
- Description*:** TC Fee
- Pay To*:** Jenny Baxter
- Address*:** 201 N. Civic, Walnut Creek CA 94596, US
- Phone*:** (925) 934-2900
- Email:** jennybaxter@kw.com

At the bottom, the 'Add' button is highlighted with a red box and a red arrow pointing to it from the right.

Remember, a TC will do all of this for you.

Working with Commissions continued [Submit Referral Fee]

1.

Adding an Outside Referral Fee to Commissions

Edit Agent Payment

Agent Units* 1 Agent Gross Commission* \$21,625.00

Calculate Commission

Associate Royalty	-	\$0.00
Rate	6.0%	
Split	100.0%	
Company Commission	-	\$4,325.00
Split	20.0%	
Additional Deductions	-	\$0.00
E&O		\$0.00
BOLD Scholarship		\$0.00
Nonprofit Deductions	-	\$0.00
KW Cares		\$0.00
KW Kids Can		\$0.00
Net to Agent		\$17,300.00

Extra Payment Options
Referrals, Bonuses, Deductions, Concessions

+ Add item

1. Click on “Edit Agent Payment” & “Add Item.”
2. Select “Outside Referral.”
3. Enter Referral Information.
4. Click “Save.”

1.

2.

Add Item

Type of additional element

Choose the Type

Deduction

Inside Referral

Outside Referral

3.

4.

Add Item

Type of additional element
Outside Referral

Referral Percentage* 0% Amount* \$0.00

BROKERAGE DETAILS

Representative Name*
Select...

Phone* Ext. Type*
Select...

Email

Company Name/DBA*
Select...

Tax ID Type* Tax ID Number*
 EIN SSN

Office/Branch Nickname*

Legal Name*

Cancel **Save**

Remember, a TC will do all of this for you.

Working with Commissions – Add Another Agent [Co-Agent]:

- To add Co-Agent, 1st change “Agent Units” to .5 [50%/50% split] > Click on “Add Another Agent”
- Once everything is correct, click on **Submit**. NOTE: “Alerts” display under “Submit” button if not done correctly.

Offers & Commissions / Manage Commission

General Information

Sales Price	Commission Rate	Total Commission	Total Units	Contract Date*
\$500,000.00	2.5%	\$12,500.00	1.0	08/15/23

Closed Date* 09/29/23 DA ID --

Payment **+** Add Another Agent **+** Add Co-Broker Payment

Christy Bounds

Agent Units	Agent Gross Commission	Net Pay to Agent	Payment date
0.5	\$6,250.00	\$4,075.00	09/29/23

PAYMENT BREAKDOWN

Agent Gross Commission	\$6,250.00
Associate Royalty	-\$375.00
Company Commission	-\$1,250.00

Rate 6.0% Split 100.0%

0% Cap: \$3,000.00 Actual: \$0.00 Balance: \$3,000.00

Summary

Total Commission	\$12,500.00
Pay to Office	\$1,625.00
Associate Royalty	\$375.00
Company Commission	\$1,250.00
Additional Deductions	\$0.00
Nonprofit Deductions	\$0.00
Pay to Agents	\$4,075.00
Christy Bounds	\$4,075.00
Other Deductions	\$550.00

Alerts

- ⚠ Remaining Agent Commission Balance: \$6,250.00
- Total agent commissions do not equal the total commission for the opportunity.
- ⚠ Remaining Unit Balance: 0.500 Unit
- Agent unit values must total to 1.0

Submit

Alerts will disappear once you have added the co-agent information.

Remember, a TC will do all of this for you.

On “Add Another Agent” page:

1. Enter Co-Agent name
2. Change “Agent Units” to .5 [Units to total 1]
3. Click “Calculate Commission” for automatic adjustment.
4. Add any Additional Deductions for Co-Agent
 - Use dollar figures
5. Click “Save Changes”

The screenshot shows the 'Add Another Agent' form with the following fields and values:

- Agent Name***: Margot Poss
- Agent Units***: 0.5
- Agent Gross Commission***: \$5,750.00
- Calculate Commission**: A blue button with a refresh icon, highlighted with a red box and arrow.
- Associate Royalty**: -\$0.00
 - Rate: 0%
 - Split: 0%
- Company Commission**: -\$0.00
 - Split: 0%
- Additional Deductions**: -\$0.00
 - E&O: \$0.00
 - KW Cares: \$0.00
 - KW Kids Can: \$0.00
 - BOLD Scholarship: \$0.00
- Net to Agent**: \$0.00

At the bottom, there are two buttons: **Cancel** and **Save Changes**. The **Save Changes** button is highlighted with a red box and arrow.

Remember, a TC will do all of this for you.

Review “Commission” page

1. Click “Add Note” to add any note you would like the MCA to see.
 - Title Company, Escrow Officer, Escrow # and Officer email address
 - Perhaps mention that there is a Referral at ___% so MCA can change figures.
2. If numbers are correct, click “Submit.”

General Information [Edit General Information](#)

Sales Price	Commission Rate	Total Commission	Total Units
\$460,000.00	2.5%	\$11,500.00	1.0
Contract Date*	Closed Date*		
07/15/20	08/31/20		

Payment [Add Another Agent](#) [Add Co-Broker Payment](#)

Christy Bounds [Edit Agent Payment](#)

Agent Units	Agent Gross Commission	Net Pay to Agent	Payment date
0.5	\$5,750.00	\$3,805.00	08/31/20

PAYMENT BREAKDOWN

Agent Gross Commission	\$5,750.00
Associate Royalty	-\$345.00
Company Commission	-\$1,150.00
Additional Deductions	-\$450.00

Summary [Open](#)

Total Commission	\$11,500.00
Pay to Office	\$1,494.99
Associate Royalty	\$345.00
Company Commission	\$1,150.00
Additional Deductions	\$0.00
Pay to Agents	\$9,555.01
Christy Bounds	\$3,805.00
Margot Poss	\$5,750.01
Other Deductions	\$450.00

Add Note **Submit**

Note to include: Title Company, Escrow Officer, Escrow # and Officer email address and any referral information.

Submit Commission
If numbers are correct and you have added Note to MCA, click “Submit.”

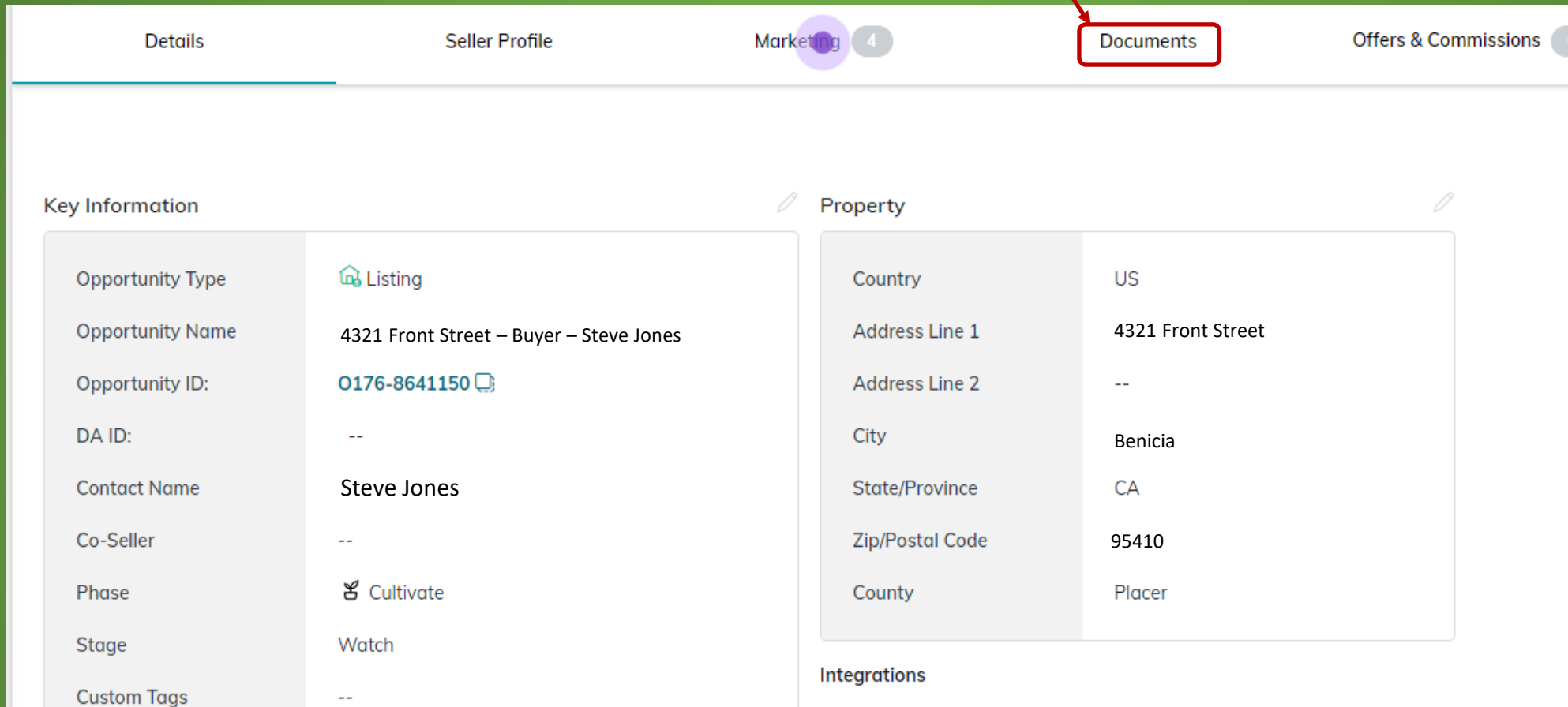
Remember, a TC will do all of this for you.

Review Commission Details

GROSS COMMISSION	\$10,000.00
<hr/>	
ROYALTY	-\$600.00
<hr/>	
Associate Royalty	\$600.00
Rate	6%
Split	100%
<hr/>	
COMPANY COMMISSION	-\$2,000.00
<hr/>	
Company Commission	\$2,000.00
Split	20%
<hr/>	
DEDUCTIONS	-\$500.00
<hr/>	
E&O	\$0.00
KW Cares	\$0.00
KW Kids Can	\$0.00
BOLD Scholarship	\$0.00
▶ Keller Williams Realty - Office fee	\$50.00
▶ Transaction co-ordinator	\$375.00
▶ Keller Williams Realty - TC	\$75.00
<hr/>	
CHECK AMOUNT	\$6,900.00

Remember, a TC will do all of this for you.

Click the “Documents” tab:



The screenshot shows a navigation bar with five tabs: 'Details', 'Seller Profile', 'Marketing' (with a '4' badge), 'Documents' (highlighted with a red box and a red arrow), and 'Offers & Commissions' (with a '0' badge). Below the navigation bar, the 'Key Information' section is on the left and the 'Property' section is on the right. The 'Key Information' section contains a table with the following data:

Key Information	
Opportunity Type	Listing
Opportunity Name	4321 Front Street – Buyer – Steve Jones
Opportunity ID:	0176-8641150
DA ID:	--
Contact Name	Steve Jones
Co-Seller	--
Phase	Cultivate
Stage	Watch
Custom Tags	--

The 'Property' section contains a table with the following data:

Property	
Country	US
Address Line 1	4321 Front Street
Address Line 2	--
City	Benicia
State/Province	CA
Zip/Postal Code	95410
County	Placer

Below the 'Property' section, there is an 'Integrations' section which is currently empty.

Remember, a TC will do all of this for you.

Select Checklist Type

Pick checklist type ▼

- Residential
- New Home Sale 0
- Commercial S 0
- Vacant Land S 0
- San Francisco S 0

Generally, choose Residential Checklist.

To start work with opportunity please select checklist type first

Checklist type options now include New Home Sale as well as Commercial Sale, Vacant Land Sale, and San Francisco Sale.

Select Checklist “Event” in Left Column – Consultation / Under Contract / Closed

NOTE: “Consultation” event is only for Outgoing Referral or BRE [Buyer Representation] Agreement.

Residential Sale ▼

Under Contract ▼ 45 of 117 documents uploaded

Attach Files From: My Computer (Manual) ...

Consultation

Under Contract Resubmitted

Closed

STATUS	REQUIREMENT	DOCUMENT	TYPE	FILE
<input type="checkbox"/>	Required ⓘ	AD Agency Disclosure - Buyer & BA	Disclosure	buck-ad-buyer-ba.pdf

Remember, a TC will do all of this for you.

Upload purchase documents to Under contract “event.”

Use your Desktop folder with Purchase documents, drag and drop documents to Command “Drop your file here.” Once uploaded, they will appear at the right of the document slot. Click Submit to MC.

The screenshot displays a document management system interface. On the left, a list of documents is shown, with the top item '180 Corwin Street #5 AD - Buyer & BA' highlighted. On the right, the 'Under Contract' event details are visible, including a table of requirements and documents. A red arrow points from the 'Resubmit to MC' button to the 'Under Contract' status. Another red arrow points from the 'Drop your file here' area to the 'AD Agency Disclosure - Buyer & BA' document in the table. A third red arrow points from the 'Drop your file here' area to the '180-corwin-street-5-ad-buyer-and-ba.pdf' file name.

STATUS	REQUIREMENT	DOCUMENT	TYPE
Uploaded	Required	AD Agency Disclosure - Buyer & BA	Disclosure
Approved	Required	FHDA Fair Housing & Discrimination Advisory	Disclosure
Approved	Required	PRBS Possible Representation of More Than One Buyer or Seller - Disclosure & Consent	Disclosure
Approved	Required	RPA [16 pages] or SF RPA / RIPA / CPA / NCPA	Agreement
Approved	Required	BIA Buyer Investigation Advisory	Disclosure
Approved	Required	WFA Wire Fraud Advisory	Disclosure
Approved	Required	CCPA California Consumer Privacy Act Advisory	Disclosure

NOTE: Each “Document slot” should only have the document with that name. Otherwise you may have to generate new “Document slot” that is not on the Checklist – see Exhibit A.

Remember, a TC will do all of this for you.

Submitting initial & additional documents for Broker Review.

1. After you have uploaded your documents - **Click SUBMIT TO MC button** at top right. Otherwise, no one will be notified to check your file.
2. Once Broker Review is done in an “event,” you will receive an email from Command. If using a TC, always forward that email to your TC.
 - **REJECTED Document** – There will be an explanation of what is incorrect or missing. [Agent to replace incorrect document with corrected document and re-submit for Broker Review.]
 - **RETURNED Status** – For the entire “event.” This status will be used after each Broker Review to indicate that there are still missing documents.
 - **APPROVED Status** – This status will be used after final Broker Review to indicate that file is complete.
3. When Broker Review is done for an “event,” **you will receive an email from Command. If using a TC, always forward that email to your TC.**
4. Please note that each “event” may have over 100 document possibilities, so you may see that only 39 of 119 documents are completed. That is OK - 39 may be all that is needed for a complete file.
 - **The key is to see what is REQUIRED and what may be MISSING.**

Remember, a TC will do all of this for you.

Submitting documents for Broker Review.

The key is to see what is REQUIRED and what may be MISSING.

<input type="checkbox"/>	Approved	Required ⓘ	CCPA California Consumer Privacy Act Advisory	Disclosure	ccpa.416corcoran.pdf	⋮
<input type="checkbox"/>	Missing	Required ⓘ	DIA Disclosure Information Advisory	Disclosure	Drop your file here. Browse	🗨️
<input type="checkbox"/>	Approved	Required ⓘ	SELM Seller Instruction To Exclude Listing From The MLS / Send to Board	Authorization	selm.416corcoran.pdf	⋮
<input type="checkbox"/>	Not uploaded	Conditional ⓘ	Commission Adjustment Approval (if under 5% total)	Authorization	Drop your file here. Browse	🗨️
<input type="checkbox"/>	Not uploaded	Conditional ⓘ	SFLS Square Foot / Lot Size Disclosure	Disclosure	Drop your file here. Browse	🗨️
<input type="checkbox"/>	Missing	Required ⓘ	MLS Active Printout	Disclosure	Drop your file here. Browse	🗨️

Once the CLOSING Event is complete and status is APPROVED, Broker Reviewer will send a “Comment” to the Agent and the MCA that file is “Cleared to Close.” Agent [or TC] will then open Command and change the “Opportunity” from Under Contract” to “Closed” in the Command Timeline.

Remember, a TC will do all of this for you.

1. Once CLOSED Event is complete and status is APPROVED, Broker Reviewer will send a “Comment” to the Agent and the MCA that file is “Clear to Close.”
2. Agent [or TC] will then open Command and change the “Opportunity” from Under Contract” to “Closed” in the Command timeline.

Each “event” status needs to state “APPROVED.”

LISTING Transaction

- Listed
- Under Contract
- Closed

BUYER Transaction

- Consultation
- Under Contract
- Closed

The screenshot displays the 'Opportunities' interface for a property at '100 52nd Street - Matt Nedresky - Buyer'. The user 'Matt Nedresky' is logged in. The 'Opportunity Details' section shows a 'Status' dropdown set to 'Select...'. Below this, a timeline of events is visible: 'Residential', 'Consultation', 'Under Contract', and 'Closed'. The 'Under Contract' and 'Closed' events are marked with a green checkmark and the word 'Approved'. A red arrow points from the 'Approved' label for the 'Closed' event to a comment box in a 'Closed: Checklist Comments' dialog. The comment box contains the text '@Christy Bounds @Jen Hecht Clear to Close' and is dated '3 Jan, 04:13 PM' by 'You'. Another red arrow points from the 'Buyer' label in the top header to the same comment box. A third red arrow points from the 'Approved' label for the 'Under Contract' event to the comment box.

Remember, a TC will do all of this for you.

Change Opportunity from “Under Contract” to “Closed.”

1. Open “Opportunity” Page.
2. Go to Opportunity Timeline.
3. Click on “Under Contract.”
4. At “Under Contract” Page. Drag the Listing (or Buyer) box from the “Clear to Close” stage to the “Closed” stage box.
5. Make sure Closing date is accurate.

Shemida Arteta All Opportunities All Discussions

Ready to bring your dotloop loops into Command? Click the import from dotloop button to get started. Import from dotloop

Shemida Arteta Show Comparison Create Opportunity

Listings

Cultivate Appointment Active Under Contract Closed

Volume: 680,000 Avg. Time: 12.1 days Volume: 0 Avg. Time: -- Volume: 0 Avg. Time: -- Volume: 1.53M Avg. Time: 126.6 days Volume: 1.33M Avg. Time: --

GCI

Potential Income \$66,300.00

Total commission from all listing opportunities

Probable Income \$42,330.00

Adjusted commission based on each stage's probability to close

Back Listings: Under Contract SHEMIDA ARTETA

Sort by: Select...

Cultivate Appointment Active Under Contract Closed

praisal 0 90% Financing 0 90%

Glass - Listing
1234 Main Street - Listing -
Amy Glass

SA 0/0

Remember, a TC will do all of this for you.

Opportunity & Commission Submissions to be completed within 1 business day of ratified agreement.

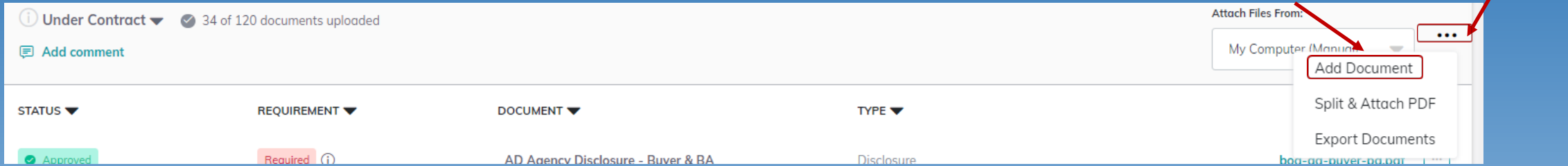
1. Set up Listing Opportunity, upload initial documents & submit to MC within 1 business day.
2. Set up Buyer Opportunity, upload initial documents & submit to MC within 1 business day.
 - a. This includes a New Home Construction Buyer.
3. Submit Commission Request for each Sale [Buyer Opportunity] within 1 business day.
 1. Enter all Commission Details [Deductions & Referrals] & submit Commission Request.
 2. Processing of Commission Demand may take 48 -72 hours.
4. If a Listing Opportunity is now in contract, then the Listing Agent uses the Under Contract event on the original Listing Opportunity to submit the Sale.
5. In dual-agency [LA & BA are the same agent] there needs to be 2 Opportunities [Listing-side & Buyer-side] with two separate Commission Submissions.

Exhibits – Command Tips

- A. How to Add a new “Document slot” that is not on the Checklist.
- B. How to Replace an existing document in a “Document slot.”
- C. How to enter a Command Opportunity for a Buyer New Home Sale
- D. How to use “Consultation” event for Outgoing Referral or Buyer-Broker Agreement.
- E. How to process a Buyer cancellation.
- F. How to Add a New Buyer to an existing Listing after original Buyer cancellation.

A. How to Add a new “Document slot” that is not on the Checklist.

Click on the 3 dots to the right on the “under contract” task bar. Click the “Add Document” tab



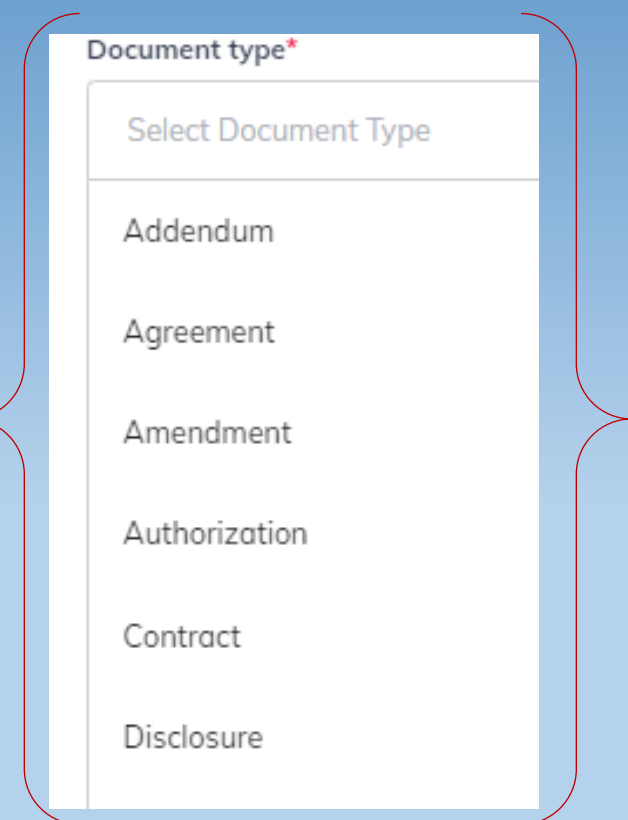
Enter Document name, document type (Addendum, Agreement, Disclosure, etc.), drag and drop your document and click “Save.”

Document Name

Document Type

Drag and drop document here.

Click Save

A screenshot of a form titled 'Add item'. The form contains the following fields: 'Document name*' with a text input field containing 'Enter document name here'; 'Document type*' with a dropdown menu showing 'Select Document Type'; 'Additional note' with a text input field; 'Source of Documents*' with a dropdown menu showing 'My Computer (Manual)'; a file upload area with a dashed border and a warning icon, containing the text 'Drag and drop or browse your files' and 'Only .pdf files are supported'; and a yellow warning box with a warning icon and the text 'Please, select or upload a document'. At the bottom of the form are two buttons: 'Cancel' and 'Save'. Red arrows point from the text labels on the left to the corresponding fields in the form.

B. How to Replace an existing document in a “Document slot.”

To replace a document, click on the 3 dots to the right of the document you want to replace and then click “update”. The “update document” box will pop up and you can drag the new document here and then click “Update”. This will replace the document previously uploaded so be sure to upload ALL pages of the new document not just the portion that needed correction or revision.



At the “Update Document” screen, enter a reason for updating the document: “Correct the document.” Then drag and drop the updated documents and click update.

Enter a reason for updating the document: “Correct the document.”

Drag and drop the document here.

Click Update

Update Document

Select the updated document for Pre-Approval Letter or upload a new document

You can still access previous file in document's version history.

Comment

Why are you re-uploading this document?

Source of Documents*

My Computer (Manual)

Drag and drop or browse your files
Only .pdf files are supported

Cancel Update

Remember, a TC will do all of this for you.

C. How to enter a Command Opportunity for a New Home Buyer Sale.

NEW HOME BUYER SALE

Select "New Home Sale" Checklist from list.

NEW HOME BUYER SALE

Under the New Home Sale list of "events," upload documents to the "Under Contract" Event. There are only 4 document slots.

1. New Home Referral Agreement [Client Registration]
2. New Home Purchase Contract
3. New Home Disclosures
4. New Home Addenda

STATUS	REQUIREMENT	DOCUMENT	TYPE	FILE
<input type="checkbox"/> Approved	Required	New Home Referral Agreement	Agreement	615-broker-registration.pdf
<input type="checkbox"/> Approved	Required	New Home Purchase Contract	Agreement	616-pa.pdf
<input type="checkbox"/> Not uploaded	Conditional	New Home Disclosures	Disclosure	Drop your file here. Browse
<input type="checkbox"/> Not uploaded	Conditional	New Home Addenda	Agreement	Drop your file here. Browse

Remember, a TC will do all of this for you.

D. Use “Consultation” event to enter Outgoing Referral.

Select “Residential Sale” Checklist and go to “Consultation” Event. Only use the top “document slot.”

Residential

- New Home Sale
- Commercial S
- Vacant Land S
- Residential Sale
 - Consultation
 - Under Contract
 - Closed

Consultation 0 of 6 documents uploaded

Attach Files From: My Computer (Manual)

STATUS	REQUIREMENT	DOCUMENT	TYPE	FILE
<input type="checkbox"/> Not uploaded	Conditional	Outgoing Referral Agreement [Other Broker pays KW]	Contract	Drop your file here. Browse

Upload the Referral Agreement document & submit for Review.

E. Use “Consultation” event to enter BRBC [Buyer Representation and Broker Compensation] forms.

1. Create a Buyer Opportunity [Buyer needs to already be a Contact].
2. Name the Opportunity as the Buyer Name.
3. Choose the “Residential” Checklist and go to “Consultation” event.
4. Using the last 5 document slot to submit the ratified AD, BIA, BRBC and BTA. [ABCD would be submitted later.]
5. **SUBMIT TO MC for Broker Review.**

<input type="checkbox"/> Not uploaded	Conditional	AD Agency Disclosure - Buyer & BA	Disclosure	Drop your file here. Browse
<input type="checkbox"/> Not uploaded	Conditional	BIA Buyer Investigation Advisory	Agreement	Drop your file here. Browse
<input type="checkbox"/> Not uploaded	Conditional	BRBC – Buyer Representation and Broker Compensation Agreement	Agreement	Drop your file here. Browse
<input type="checkbox"/> Not uploaded	Conditional	ABCD – Anticipated Broker Compensation Disclosure – Recommended for KW Buyer.	Disclosure	Drop your file here. Browse
<input type="checkbox"/> Not uploaded	Conditional	BTA – Buyer Transactional Advisory	Disclosure	Drop your file here. Browse

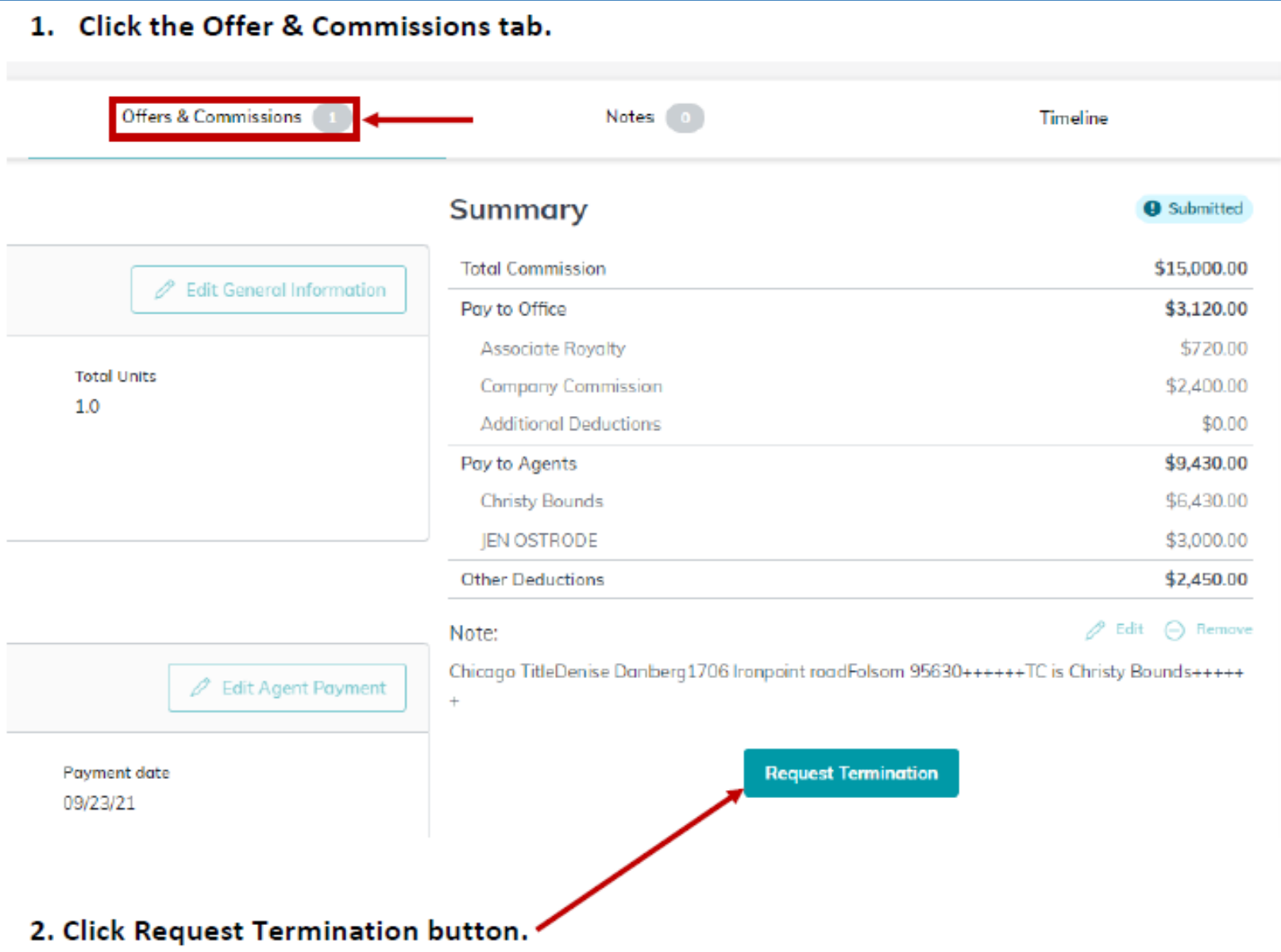
Once Buyer is in contract

Change the Opportunity name to “Property Address – Buyer name – Buyer.” Enter Purchase as usual, submit your commission request and submit contract documents in the “Under Contract” event. Click SUBMIT TO MC when finished.

Remember, a TC will do all of this for you.

E. How to process a Buyer cancellation.

1. Click the Offer & Commissions tab.



The screenshot shows a web interface for managing offers and commissions. At the top, there are three tabs: 'Offers & Commissions' (highlighted with a red box and a red arrow), 'Notes' (with a '0' indicator), and 'Timeline'. Below the tabs is a 'Summary' section with a 'Submitted' status indicator. The summary includes a table of financial details and a note section.

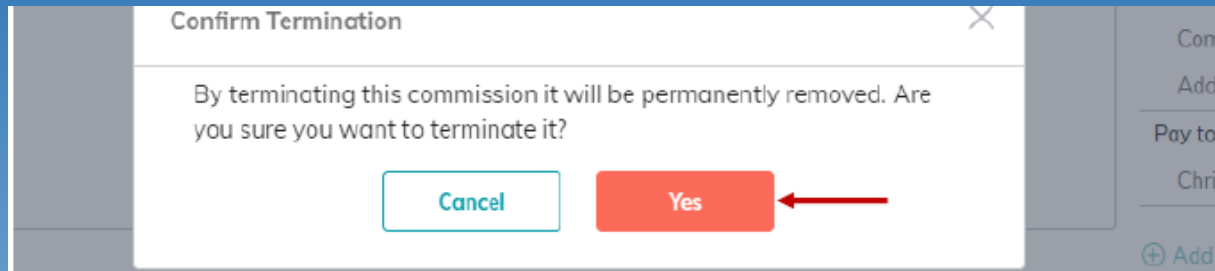
Summary		Submitted
Total Commission	\$15,000.00	
Pay to Office	\$3,120.00	
Associate Royalty	\$720.00	
Company Commission	\$2,400.00	
Additional Deductions	\$0.00	
Pay to Agents	\$9,430.00	
Christy Bounds	\$6,430.00	
JEN OSTRODE	\$3,000.00	
Other Deductions	\$2,450.00	

Note: Chicago TitleDenise Danberg1706 Ironpoint roadFolsom 95630+++++TC is Christy Bounds+++++
+

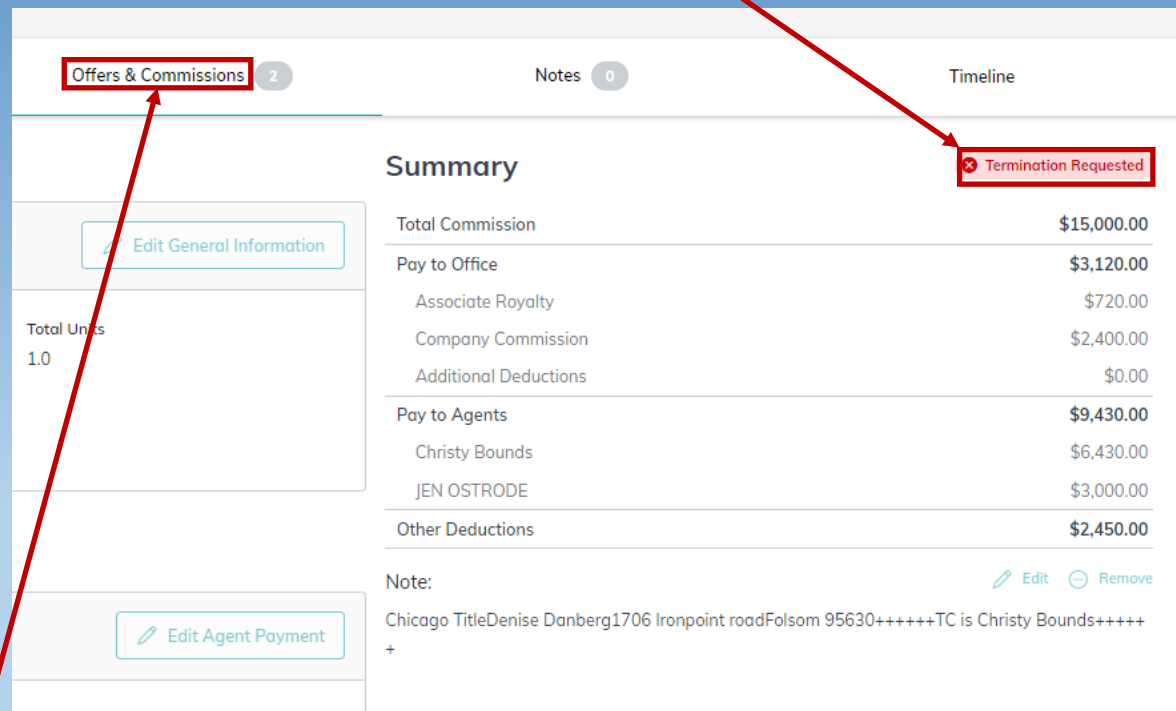
2. Click Request Termination button.

Remember, a TC will do all of this for you.

3. After clicking “Request Information,” Click “Yes” on pop-up box to terminate the current Commission Demand.



4. The Broker Demand page will now have “Termination Requested” highlighted.



5. Click on “Offers & Commissions” tab to enter the details of the new Offer.

F. How to Add a New Buyer to an existing Listing after original Buyer cancellation.

Offer Timeline		Add New Offer		Compare Offers	
JUL 15, 2020		CT Christy Test Buyer		Christy Bounds Agent	
Buyer Pre Approved		Buyer Pre Qualified			
\$500,000.00 Offer	\$50,000.00 Cash	\$450,000.00 Finance Amount	\$0.00 Earnest Amount	\$0.00 Option Fee	08/31/20 Closed Date
0 days Termination Notice		Resolving Status		-- (i) DA ID	
JUL 16, 2020		TL Test Buyer		Test Agent	
Buyer Pre Approved		Termination Requested		Commission Status	
Buyer Pre Qualified				View Commission	
\$460,000.00 Offer	\$20,000.00 Cash	\$440,000.00 Finance Amount	\$0.00 Earnest Amount	\$0.00 Option Fee	08/31/20 Closed Date
0 days Termination Notice		Accepted Status		-- (i) DA ID	

1. Enter the details of the new Offer and click "Accept" button. Enter Commission information details including any TC Fees and click Submit. Remember to put Title company information in the "Note" just above the Submit button.

2. Click "Under Contract" event and then "Under Contract" drop-down menu. Then, select Add Version to open "Add New Version" pop-up box.

Details	Seller Profile	Documents	Offers & Commissions
Status: Select...			
Residential			
Listed	Approved		
Under Contract	Approved	Under Contract	
Closed	Approved		

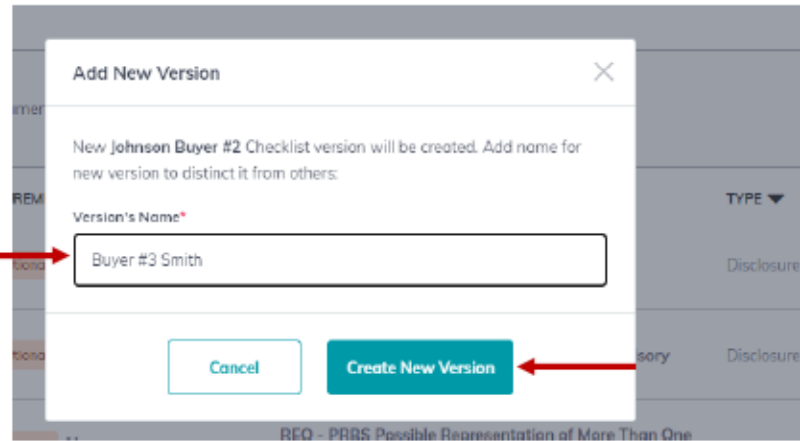
Under Contract 37 of 114 documents uploaded

REQUIREMENT Conditional

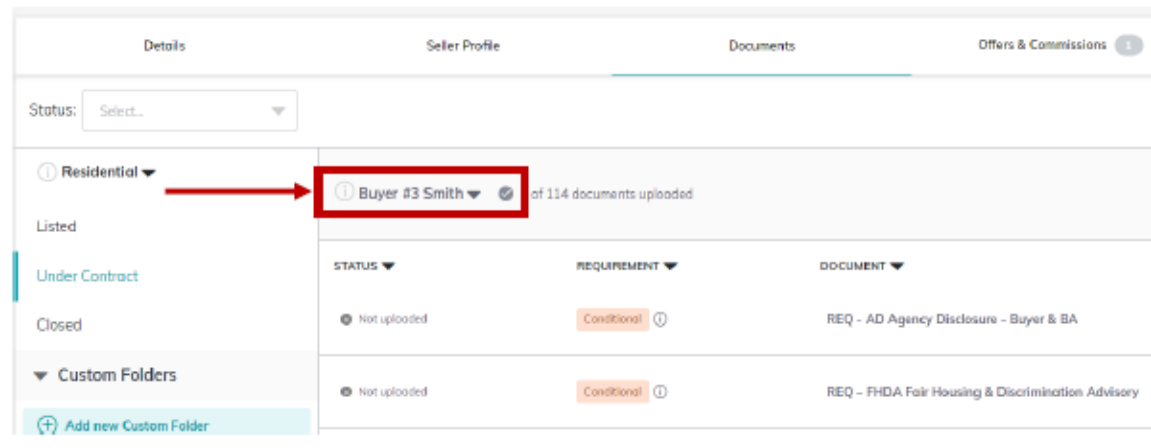
DOCUMENT REQ - AD Agency Disclosure - Buyer & BA

Remember, a TC will do all of this for you.

3. In “Add New Version” pop-up box, change the Version’s Name to “Version #2” – new Buyer Name. This example shows “Buyer #3 – Smith.” Then click “Create New Version” button.



4. The new version will now be the default where you can begin uploading documents specific to this new Buyer.



5. Repeat steps 1-4 for the “Closed” event [Add a New Version] so it matches the New Buyer name and differentiates it from the previous “Closed” event.

Remember, a TC will do all of this for you.