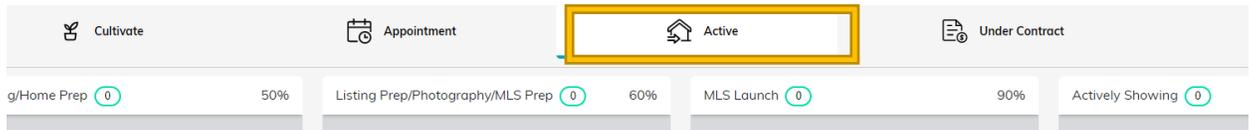


## LISTINGS - OPPORTUNITIES

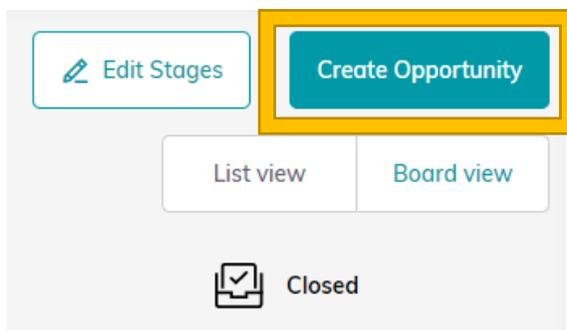
**\*\*Contact must be added first\*\***

Once the contact is added, the listing file can be added in opportunities

1. Click on Opportunities
2. Click on the ACTIVE PHASE



3. Click on CREATE OPPORTUNITY in Upper right corner



4. Create the Opportunity by completing the following:
  - Market Center – Exton (Auto-Populated)
  - Team – The Dickerman Team (Auto-Populated)
  - Opportunity Type – LISTING (Auto-Populated)
  - Client – Select the Client by typing in the name and selecting from the dropdown
  - Select a Co-Seller if necessary

### **\*\*\*\*OPPORTUNITY NAME\*\*\*\* - SUPER IMPORTANT!!!**

- Enter the client **LAST NAME – Listing – Street number and Name**
  - **Ex: Dickerman – Listing – 527 Ferncastle Dr**
  - **Pallini – Listing – 575 Taylor Rd**
  - **Smith – Listing - 123 Main St**

#### **DO NOT ENTER A First Name or city or zip!!!**

- No Custom Tags at this time
- Estimated Close Date - Enter a date approximately 3 months after the estimated list date
- Estimated List Price – Enter an approximate amount (if agent has given a range of \$400-450k, then put 425k)
- Commission Rate – enter the amount per the listing agreement

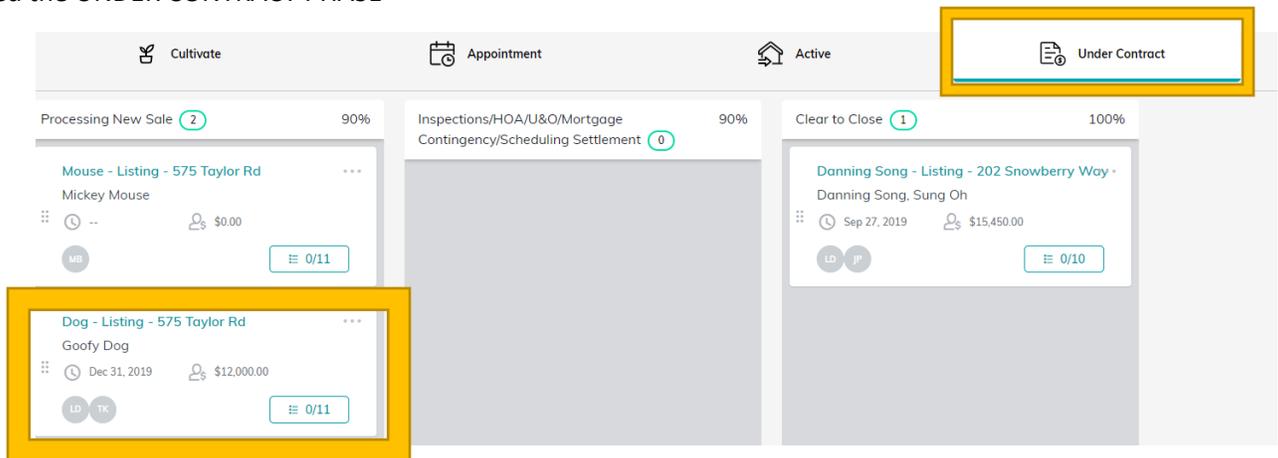
- Opportunity Phase – Active
- Opportunity Stage – Staging and Home Prep
- Assignee(s) – Lauren Dickerman and the Listing Agent

5. Click on Create Opportunity

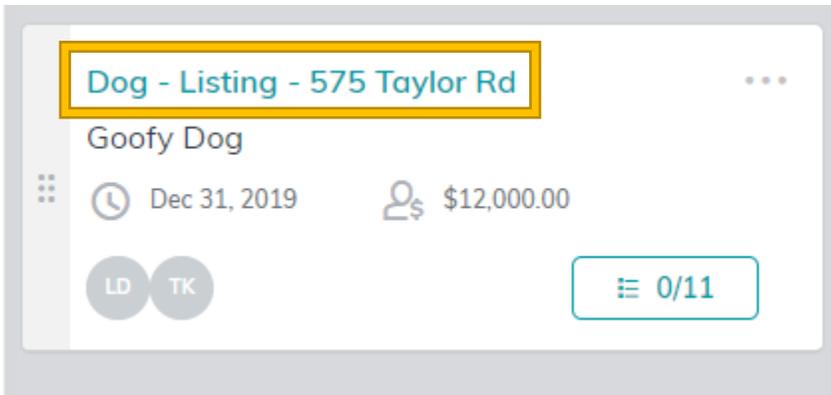
On the listing side, we can move through the phases until the offer comes in. Once the offer comes in, and the listing is officially under contract we will create the OFFER within OPPORTUNITIES. **\*\*The OFFER is the new GreenSheet!\*\*** This is where we are entering commission details and Sale Price.

For now, we are only creating ONE offer. We are NOT using OFFERS at this time to present multiple offers to the client. Again, this is essentially the greensheet.

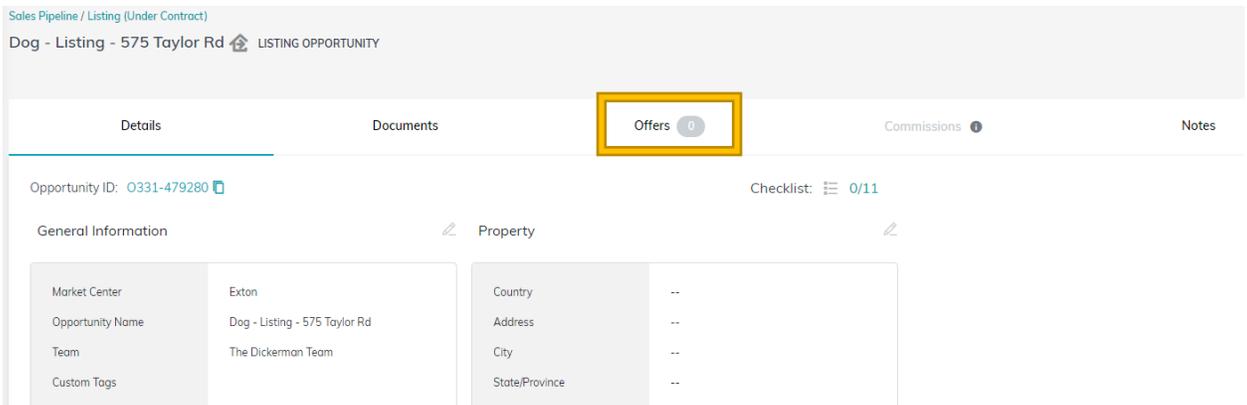
When the Listing agent submits that the property has gone under contract, the opportunity card will get moved the UNDER CONTRACT PHASE



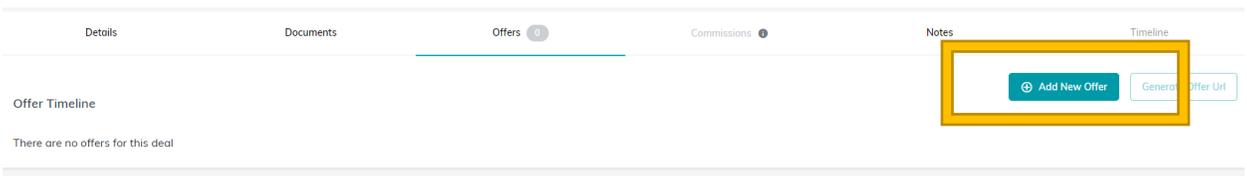
Click on the Opportunity Name to enter details



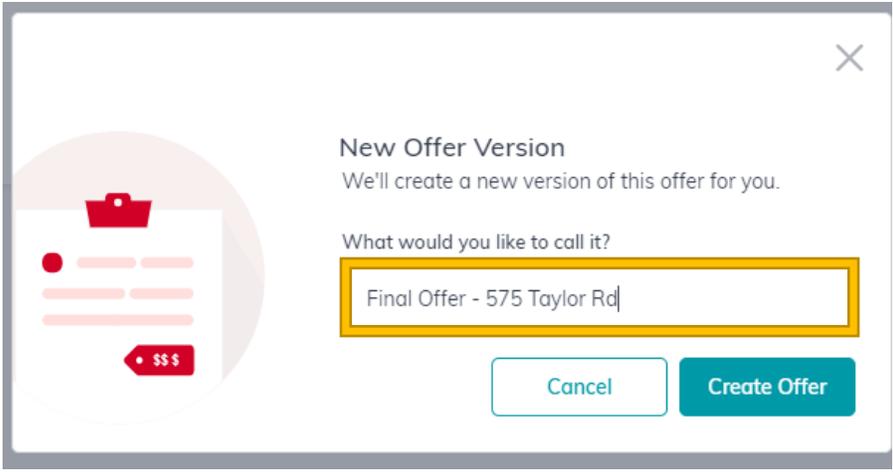
Once in the details section you can create the offer by clicking on offers



Click on ADD NEW OFFER in the upper right corner



Title the offer – “Final Offer – Street address”



Click on Create Offer

Enter the details of the offer and click PARTIES

Version Name – should remain the same

Offer Date – Executed AOS date

Close Date – Found in the AOS

Offer Details

Version Name

Offer Date

Close Date

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

Enter the details of the parties

Buyer Name

Seller Info (should pre-populate)

Co-Op Agent Name, Phone, Email

Click on Terms



Click on Agent Analysis.

You do not need to enter anything in this section!!

Click on Save.

On the next screen you will see the terms of the offer. If the numbers are correct, you can click on ACCEPT

Dog - Listing - 575 Taylor Rd LISTING OPPORTUNITY +1 610-444-4444 goofydog@dog.com

Details Documents Offers 1 Commissions 1 Notes Timeline

Offer Timeline Add New Offer Generate Offer Url

OCT 10, 2019

MM Minnie Mouse Buyer JB Joe Blow Agent X Buyer Pre Approved X Buyer Pre Qualified Accept Reject ...

\$450,000.00	\$400,000.00	\$50,000.00	\$0.00	\$295.00	10/13/19	0 days	Reviewing
Offer	Cash	Finance Amount	Earnest Amount	Option Fee	Close Date	Termination Notice	Status

Once you click on Accept, you will notice that the COMMISSIONS tab becomes available to click on.

Details Documents Offers 1 Commissions 1 Notes Timeline

Offer Timeline Add New Offer Generate Offer Url

OCT 10, 2019

MM Minnie Mouse Buyer JB Joe Blow Agent X Buyer Pre Approved X Buyer Pre Qualified Change Response ...

\$450,000.00	\$400,000.00	\$50,000.00	\$0.00	\$295.00	10/13/19	0 days	Accepted
Offer	Cash	Finance Amount	Earnest Amount	Option Fee	Close Date	Termination Notice	Status

You will see the commission breakdown on the new screen.

This part can be tricky, however once you understand the steps, it should become easy!

To add another agent the very first step is to MANULLY change the total Commission in the Agent line for Lauren Dickerman

**Pricing Details**

Sales Price	Commission		Units
<input type="text" value="\$450,000"/>	<input type="text" value="3"/> %	<input type="text" value="\$13,500"/>	<input type="text" value="1"/>

**Payment**

Note:  
[+ Add Note](#)

Amount:  Date:

[+ Add Co-Broker Payment](#)

**Agent Breakdown**

Agent	Unit	Total Commission
<input type="text" value="Lauren Dickerman"/>	<input type="text" value="1"/>	<input type="text" value="\$13,500"/>

PAYMENT DATE: 10/13/19 \$13,500.00

Here you have to manually figure out what 75% of \$13,500 is, and then enter it in that box.

**Agent Breakdown**

Agent	Unit	Total Commission
<input type="text" value="Lauren Dickerman"/>	<input type="text" value="0.75"/>	<input type="text" value="\$10,125"/>

Once that step is done, you can scroll down and you will see an ADD AGENT button

## Agent Breakdown

Agent:  Unit:  Total Commission:

PAYMENT DATE  
▼ 10/13/19 \$10,125.00

<b>GROSS COMMISSION</b>	<b>\$10,125.00</b>	
-----		
<b>ROYALTY</b>	<b>-\$0.00</b>	
Associate Royalty	\$0.00	
Rate	<input type="text" value="6 %"/>	 Cap: \$3,000.00 Actual: \$2,999.99 Balance: \$0.00
Split	<input type="text" value="100 %"/>	
<b>COMPANY COMMISSION</b>	<b>-\$0.00</b>	
-----		
Company Commission	\$0.00	
Split	<input type="text" value="30 %"/>	 Cap: \$21,000.00 Actual: \$20,999.99 Balance: \$0.00
<b>DEDUCTIONS</b>	<b>-\$0.00</b>	
-----		
E&O	\$0.00	
KW Cares	<input type="text"/>	
KW Kids Can	<input type="text" value="\$0"/>	
BOLD Scholarship	<input type="text" value="\$0"/>	
-----		
<b>CHECK AMOUNT</b>	<b>\$10,125.00</b>	
-----		
<a href="#">+ Add Item</a>		

[+ Add Agent](#)

When you click on ADD AGENT, you will search by first or last name for our team member, find them, and click ADD.

You will manually figure out their commission split and enter the .25 Split and the dollar amount

Agent:  Unit:  Total Commission:

PAYMENT DATE  
▼ 10/13/19 \$3,375.00

<b>GROSS COMMISSION</b>	<b>\$3,375.00</b>
-----	

For now, that's it!

You do not need to worry about the cap and royalty. Just make sure the commission amounts are correct.

We will be able to submit to the MCA office soon!