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

🖌 Cultivate 🔂 Appointment		\$	Active	Under Contract		
g/Home Prep 🕕	50%	Listing Prep/Photography/MLS Prep	60%	MLS Launch 0	90%	Actively Showing 0

3. Click on CREATE OPPORTUNITY in Upper right corner

🖉 Edit S	itages	Cre	ate Opportunity		
	List vi	ew	Board view		
Closed					

- 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 he 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

省 Cultivate		Appointment	\$	Active	Under Contract
Processing New Sale 2	90%	Inspections/HOA/U&O/Mortgage Contingency/Scheduling Settlement (0)	90%	Clear to Close 1	100%
Mouse - Listing - 575 Taylor Rd Mickey Mouse	≡ 0/11			Danning Song - List Danning Song, Sung C Sep 27, 2019	ing - 202 Snowberry Way - J Oh & \$15,450.00
Dog - Listing - 575 Taylor Rd Goofy Dog ^{III} ③ Dec 31,2019 ♀ \$12,000.00 III ■ ■	 ≡ 0/11				

Click on the Opportunity Name to enter details

	Dog - Listing - 57	5 Taylor Rd
	Goofy Dog	
•••	() Dec 31, 2019	₽ _{\$} \$12,000.00
		≣ 0/11

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

Sales	Pipeline / Listing (Under Contract)					
Dog	- Listing - 575 Taylor F	Rd 🏠 LISTING OPPORTUNITY				
	Details	Documents		Offers 0	Commissions	Notes
С	pportunity ID: 0331-479280	0			Checklist: 🗮 0/11	
	General Information	l_	Property		l_	
	Market Center	Exton	Country			
	Opportunity Name	Dog - Listing - 575 Taylor Rd	Address			
	Team	The Dickerman Team	City			
	Custom Tags		State/Province			

Click on ADD NEW OFFER in the upper right corner

Details	Documents	Offers 0	Commissions	Notes	Timeline
Offer Timeline				•	Add New Offer Generor Offer Url
There are no offers for this deal					

Title the offer – "Final Offer – Street address"

	×
	New Offer Version We'll create a new version of this offer for you. What would you like to call it? Final Offer - 575 Taylor Rd
• 55.5	Cancel Create Offer

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 Final Offer - 575 Taylor Rd Offer Date 10/10/2019 Back

Enter the details of the parties

Buyer Name

Seller Info (should pre-populate)

Co-Op Agent Name, Phone, Email

Click on Terms

т	e	r	m	าร	
	~		•••		

Cash	Finance Amount	Sales Price
+		=
Earnest Amount		
Percentage Earnest Amount		
0 %		
Option Fee		
Option Fee		
Termination Option		
Buyer will give notice of termination within	n 0 days after contract.	
Seller Costs		
Seller will contribute	to a residential service	contract.
Seller will contribute	to settlement costs.	
Back		

On this screen you need to work a little backwards. If there is a mortgage, you will need to refer to the AOS to find the financed amount and enter that in manually. In this example, we will say that the total sale price is 450,000 and they are financing 50,000. **Unfortunately at this time, we have to do the manual calculation.

gent Analysis >

Terms Cash		Finance Amount		Sales Price	
\$400,000	+	\$50,000	=	\$450,000	
Earnest Amount					
Percentage Ear	nest Amount				
0 %					
Option Fee					
Option Fee					
\$295.00					

You only need to complete the Terms and the Option Fee (Typically or \$195, \$295, \$695 fee)

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 - L	isting - 575 Taylor Rd 🛉	LISTING OPPORTUNITY						 Section 4.1 Section	-444-4444 og@dog.com
	Details	Doct	uments	Offers 1	Commi	ssions 🕐	Notes	Timeline	
Offe OCT 1	r Timeline 0, 2019							Add New Offer Generate Of	fer Url
	MM Minnie Mouse Buyer	JB Joe Blow Agent	🔀 Buyer Pre Ap	oproved 🛛 🔀 Buyer Pre Qualified				Accept Reject]
	\$450,000.00 Offer	\$400,000.00 Cash	\$50,000.00 Finance Amount	\$0.00 Earnest Amount	\$295.00 Option Fee	10/13/19 Close Date	0 days Termination Notice	Reviewing Status	

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

Details	Documents	Offers 1		Commissions	Notes	Timeline
Offer Timeline 0CT 10, 2019						Add New Offer Generate Offer Url
Minnie Mouse Buyer	Joe Blow Agent	$ imes$ Buyer Pre Approved $\ imes$ Buyer Pre Qualified				Change Response
\$450,000.00 \$ Offer 0	\$400,000.00 \$50 Cash Finar	000.00 \$0.00 Earnest Amount	\$295.00 Option Fee	10/13 Close D	/19 0 days ate Termination Noti	Accepted ce 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
\$450,000	3 % \$13,500	1
Payment		
Note:		
Add Note		
Amount	Date	
\$13,500	10/13/2019	Ë
Add Co-Broker Payment		
Agent Breakdown		
Agent	Unit Total Commission	
Lauren Dickerman	- 1 + \$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
Lauren Dickerman	_ 0.75 +	\$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
Lauren Dickerman	_ 0.75 +	\$10,125
YMENT DATE		
- 10/13/19 \$10,125.00		
GROSS COMMISSION	\$10,125.00	
ROYALTY	-\$0.00	
Associate Royalty	\$0.00	Cap: \$2,000,00
Rate	6 %	(100%) Actual: \$2,999.99 Ralance: \$0.00
Split	100 %	
COMPANY COMMISSION	-\$0.00	
Company Commission	\$0.00	Car: \$21,000,00
Split	30 %	100% Actual: \$20,999.99 Balance: \$0.00
DEDUCTIONS	¢0.00	
Exilo	00.00	
VW Vide Can	40	
NV Nds Can	0	
BOLD Scholarship	\$0	
CHECK AMOUNT	\$10,125.00	
⊕ Add Item		
) 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	
Tricia Kiddie	_ 0.25 + \$3,375	Ū
PAYMENT DATE		
10/13/19 \$3,375.00		
GROSS COMMISSION	\$3,375.00	

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!