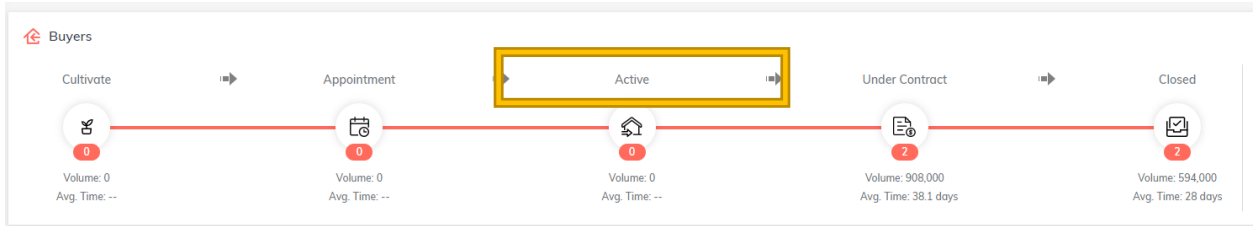


## BUYER SALES - OPPORTUNITIES

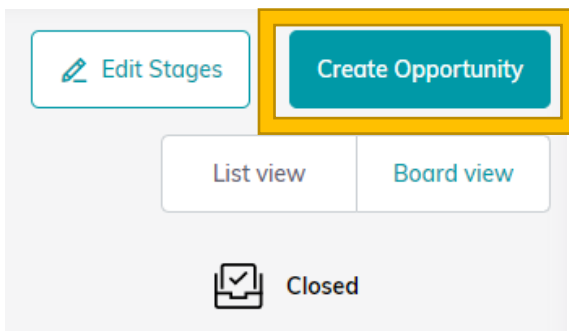
**\*\*Contact must be added first\*\***

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

1. Click on Opportunities
2. Click on the ACTIVE PHASE – n the BUYERS pipeline



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 – BUER (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 the settlement date from the AOS
- Estimated List Price – Enter the sale amount on the AOS
- Commission Rate – enter the amount per the MLS

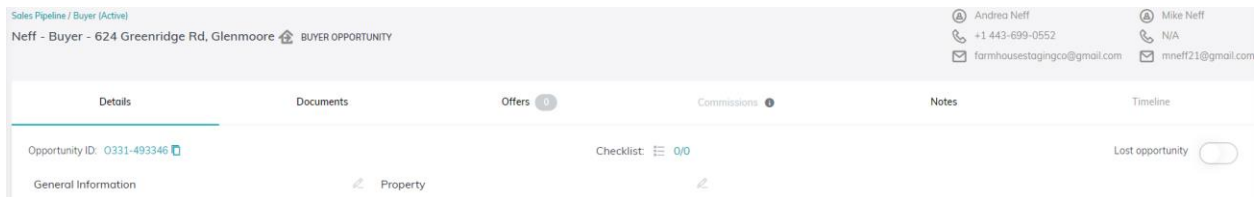
- Opportunity Phase – Active
- Opportunity Stage – Buyer Agency signed – A buyer
- Assignee(s) – Lauren Dickerman and the Buyer Agent

5. Click on Create Opportunity

On the buyer side, we will enter the client when they go under contract at this time. Because the client is officially under contract we will create the OFFER within OPPORTUNITIES and add DOCUMENT. **\*\*The OFFER is the new GreenSheet!\*\*** This is where we are entering commission details and Sale Price.

Adding Documents:

Click on DOCUMENTS at top of Opportunity record



At this stage, we can add the Consult Docs and the AOS Docs.

Make sure the Consultation folder is open (Has a green/blue marking by it and should be asking for Buyer Agency, Consumer Notice, etc)

Sales Pipeline / Buyer (Active)  
 Neff - Buyer - 624 Greenridge Rd, Glenmoore BUYER OPPORTUNITY

Details Documents Offers 0

Select:

**Residential** ⓘ

- Consultation
- Under Contract
- Closed
- Custom Folders
- [+ Add new Custom Folder](#)

**Consultation** ▼

✔ 0 of 5 documents uploaded | [+ Add Item](#)

STATUS <span>▼</span>	DOCUMENT <span>▼</span>
<span>✘</span> Not uploaded	Buyer Agency Contract Required
<span>✘</span> Not uploaded	Consumer Notice Required
<span>✘</span> Not uploaded	Social Security Authorization Required

Click on Add File on the Right side and add the corresponding document from dropbox

Consultation ▼

✔ 0 of 5 documents uploaded | [+ Add Item](#)

Status: Open Submit to MC  
 Submit within 72 hours of Execution of Listing Agreement

STATUS <span>▼</span>	DOCUMENT <span>▼</span>	TYPE <span>▼</span>	FILE
<span>✘</span> Not uploaded	Buyer Agency Contract Required	Contract	<a href="#">+ Add a file</a>
<span>✘</span> Not uploaded	Consumer Notice Required	Disclosure	<a href="#">+ Add a file</a>

Then click assign.

Add all the documents for the consult, then add all the Under contract documents, by clicking on the Under Contract Folder

When are the Documents are uploaded, you can submit to the MCA by clicking the SUBMIT TO MCA button in Upper Right

Consultation ▼

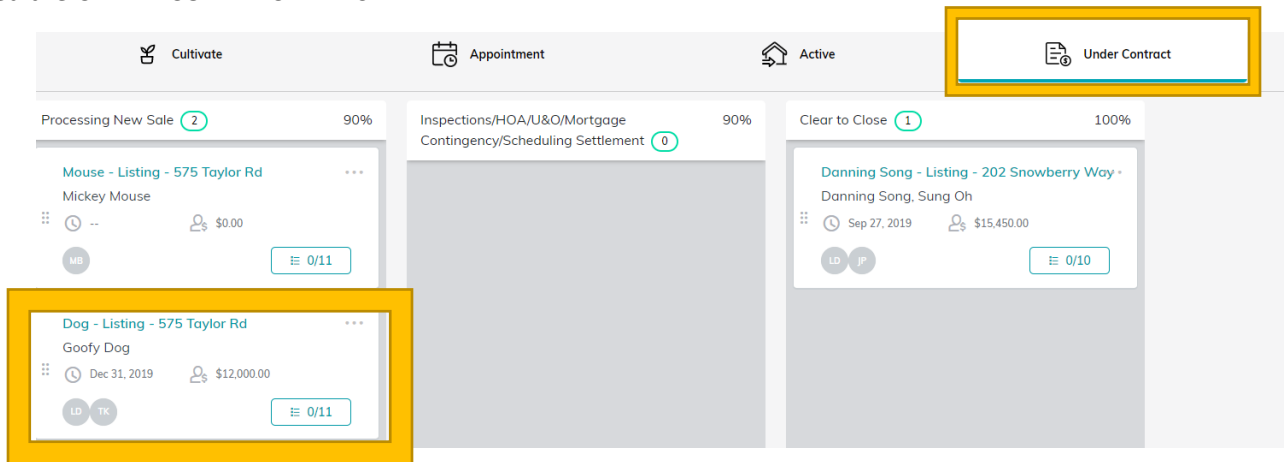
✔ 2 of 5 documents uploaded | [+ Add Item](#)

Status: Submitted Submitted  
 Submitted 10/14/19 at 10:26am

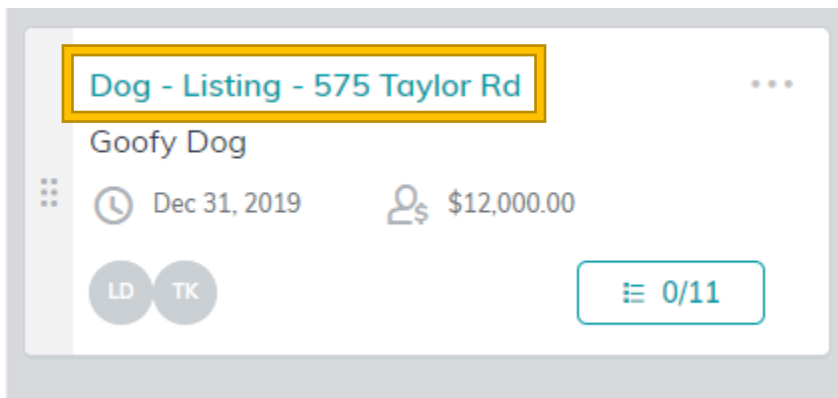
When the file closes (settlement) you will add the closing docs to the CLOSED folder and submit as well.

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

Sales Pipeline / Listing (Under Contract)  
Dog - Listing - 575 Taylor Rd LISTING OPPORTUNITY

Details Documents **Offers 0** Commissions 1 Notes

Opportunity ID: 0331-479280 Checklist: 0/11

General Information		Property	
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 1 Notes Timeline

Offer Timeline

There are no offers for this deal

**Add New Offer** Generate Offer Unit

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

Cancel Create Offer

Click on Create Offer

You can select the property from the KWLS as well. Click on Select from KWLS.

### Offer Details

Version Name

Final Offer - 624 Greenridge Rd

Offer Date

10/11/2019



Close Date

10/11/2019



Property

Select from KWLS

Address\*

624 Greenridge Rd, Glenmoore, PA, 19343, US



Back

Parties >


Enter the property address

Make sure to SHOW: ALL LISTINGS

Then Select the property by clicking on the select button

Street Address ▾ 624 greenridge rd, glenmoore, pa Search

Search Results: 638195 Status: All Statuses ▾ Show: All Listings ▾

 <p>624 Greenridge Rd Glenmoore, PA 19343 \$485,000.00</p> <p>Select</p>	<p>579 Glenmoore Dr Ann Arbor, MI 48103 \$649,900.00</p> <p>Select</p>
---	--

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



Close Date

10/13/2019



Back

Parties >

Enter the details of the parties

Buyer Name

Seller Info (should pre-populate)

Co-Op Agent Name, Phone, Email

Click on Terms

Terms

Cash		+	Finance Amount	=	Sales Price
	<input type="text"/>		<input type="text"/>		<input type="text"/>

Earnest Amount

Percentage	Earnest Amount
<input type="text" value="0"/> %	<input type="text"/>

Option Fee

Option Fee

Termination Option

Buyer will give notice of termination within  days after contract.

Seller Costs

Seller will contribute  to a residential service contract.

Seller will contribute  to settlement costs.

[Back](#)

[Agent Analysis >](#)

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.

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

### Terms

Cash  + Finance Amount  = Sales Price

### Earnest Amount

Percentage  % Earnest Amount

### Option Fee

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

Details Documents Offers 1 Commissions 0 Notes Timeline

Offer Timeline [Add New Offer](#) [Generate Offer Url](#)

OCT 10, 2019

<input type="checkbox"/>	<b>MM</b> Minnie Mouse Buyer	<b>JB</b> Joe Blow Agent	<input type="checkbox"/> Buyer Pre Approved	<input type="checkbox"/> Buyer Pre Qualified	<input type="button" value="Accept"/>	<input type="button" value="Reject"/>	<input type="button" value="..."/>
\$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** Notes Timeline

Offer Timeline [Add New Offer](#) [Generate Offer Url](#)

OCT 10, 2019

<input type="checkbox"/>	<b>MM</b> Minnie Mouse Buyer	<b>JB</b> Joe Blow Agent	<input type="checkbox"/> Buyer Pre Approved	<input type="checkbox"/> Buyer Pre Qualified	<input type="button" value="Change Response"/>	<input type="button" value="..."/>	
\$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
<input type="text" value="\$13,500"/>	<input type="text" value="10/13/2019"/>

[+ 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
Lauren Dickerman	- 0.75 +	\$10,125

PAYMENT DATE  
10/13/19 \$10,125.00

<b>GROSS COMMISSION</b>	<b>\$10,125.00</b>	
<hr/>		
<b>ROYALTY</b>	<b>-\$0.00</b>	
Associate Royalty	\$0.00	
Rate	6 %	
Split	100 %	
<b>COMPANY COMMISSION</b>	<b>-\$0.00</b>	
Company Commission	\$0.00	
Split	30 %	
<b>DEDUCTIONS</b>	<b>-\$0.00</b>	
E&O	\$0.00	
KW Cares		
KW Kids Can	\$0	
BOLD Scholarship	\$0	
<b>CHECK AMOUNT</b>	<b>\$10,125.00</b>	

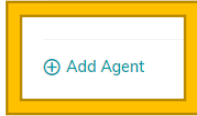
+ Add Item

Cap: \$3,000.00  
Actual: \$2,999.99  
Balance: \$0.00

100%

Cap: \$21,000.00  
Actual: \$20,999.99  
Balance: \$0.00

100%



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

PAYMENT DATE  
10/13/19 \$3,375.00

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