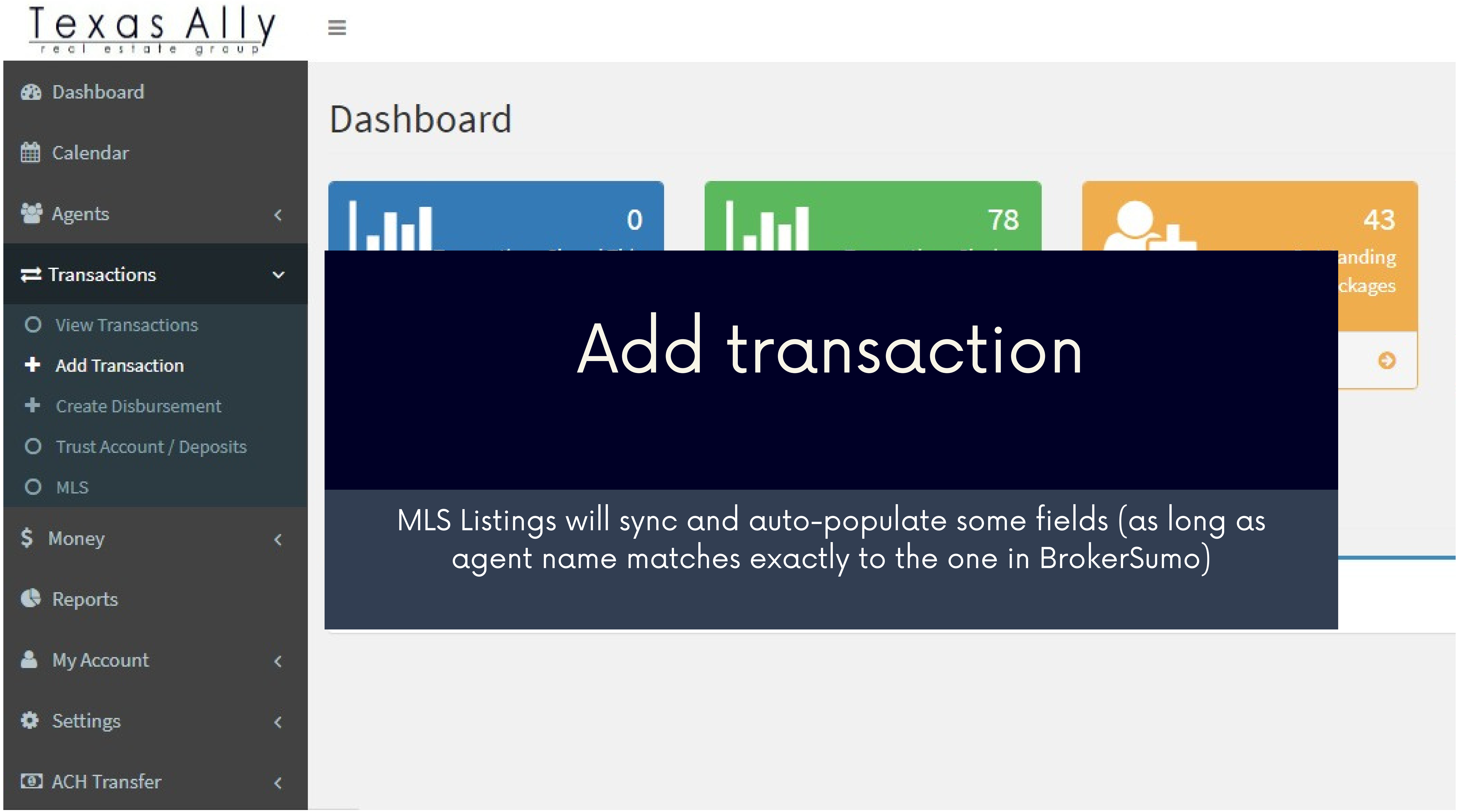
TRANSACTION MANAGEMENT

Instructions on how to enter your transactions

Texas Ally
real estate group



Add transaction

MLS Listings will sync and auto-populate some fields (as long as agent name matches exactly to the one in BrokerSumo)

Fill in remaining needed fields

TIPS:
- Co-Broke Company/Co-Broke Agent is the representation for the other side
- If you are representing the buyer, transaction type is "**selling**"
- If representing the seller, transaction type is "**listing**"

Select an Option

%

0

State/Province: Texas

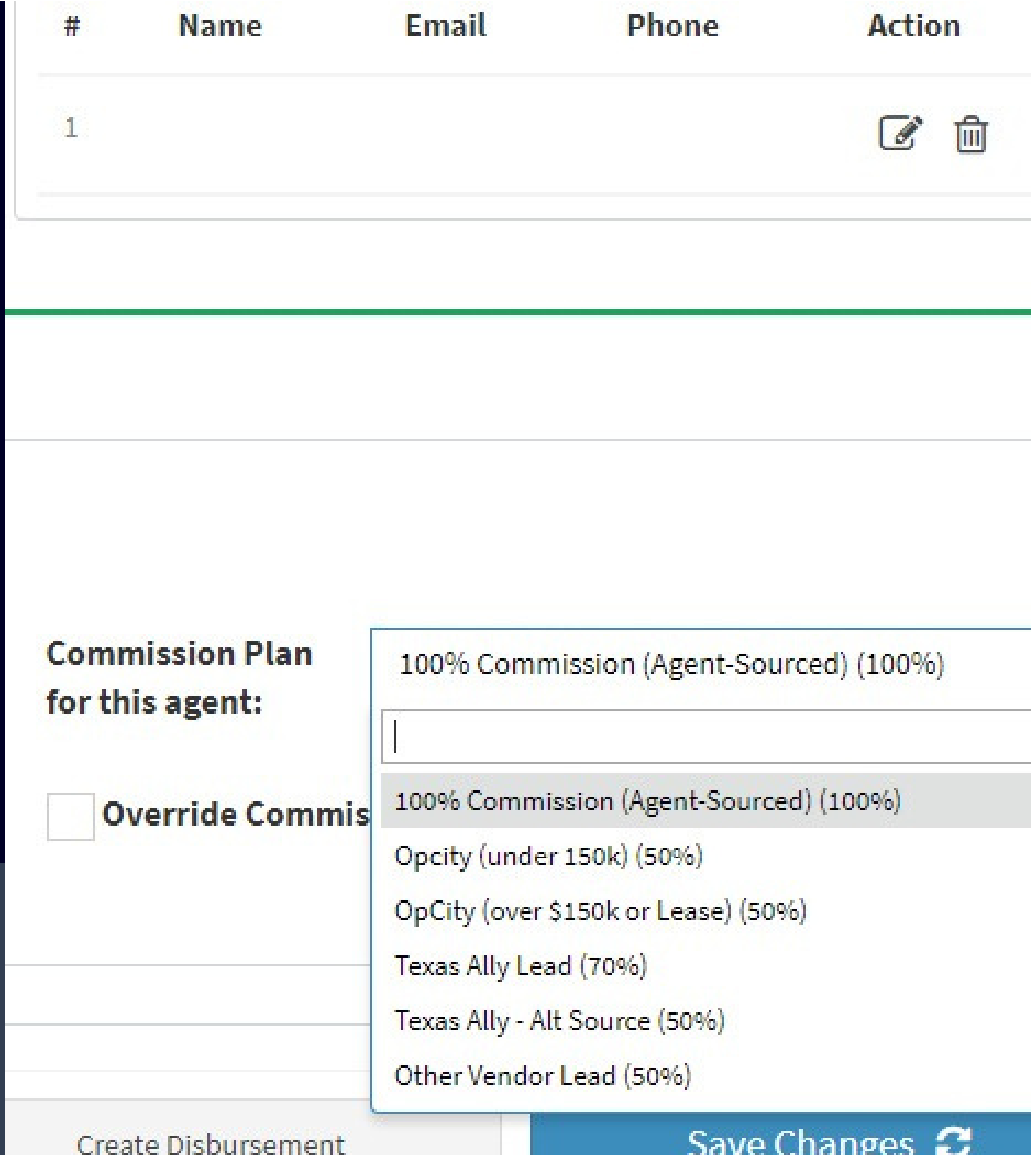
Co-Broke Company: (Optional)

Co-Broke Agent: (Optional)

View/Add Co-Broke

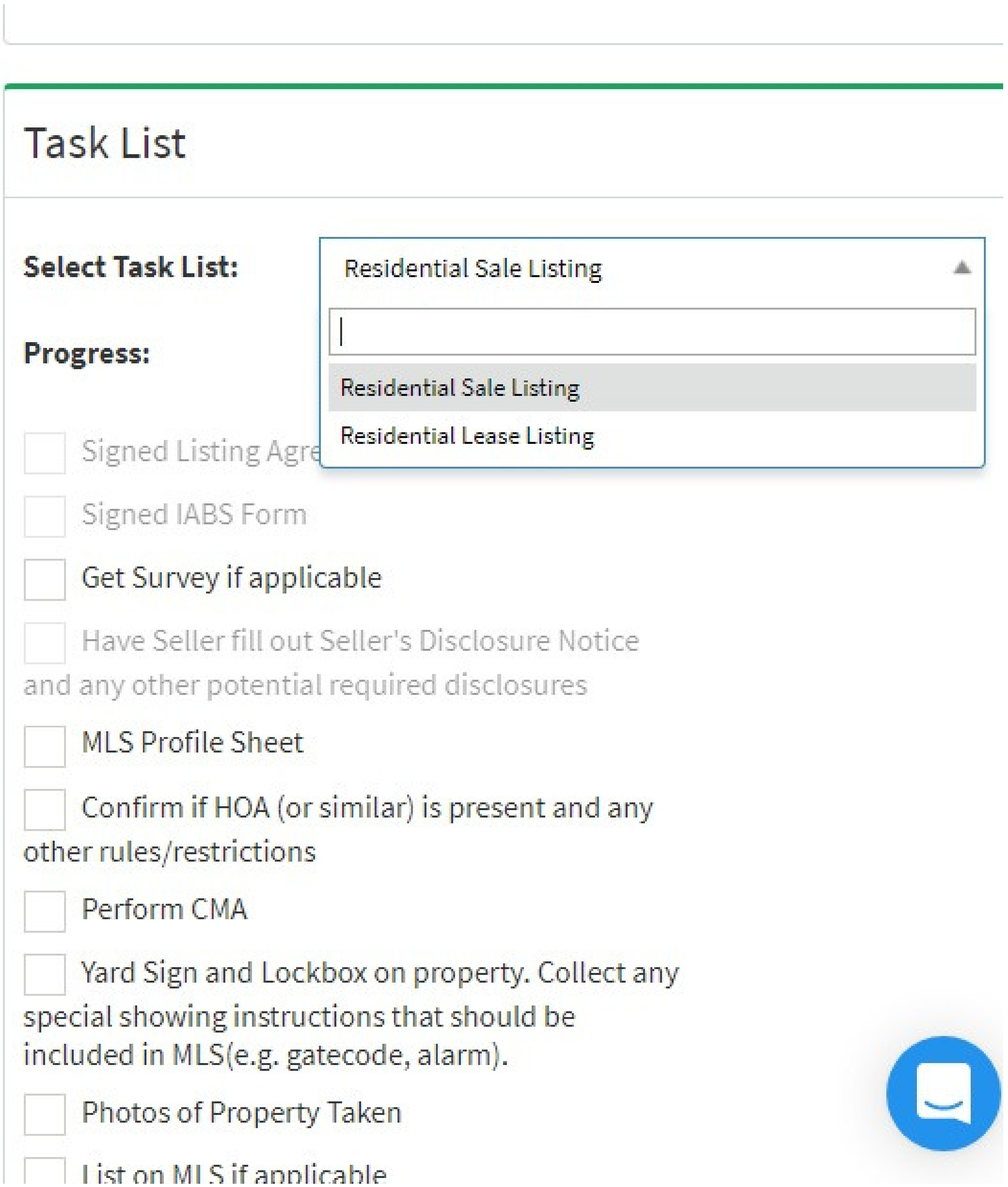
Update Commission Plan if needed based on Lead Origination

Internal team will override this if labeled incorrectly



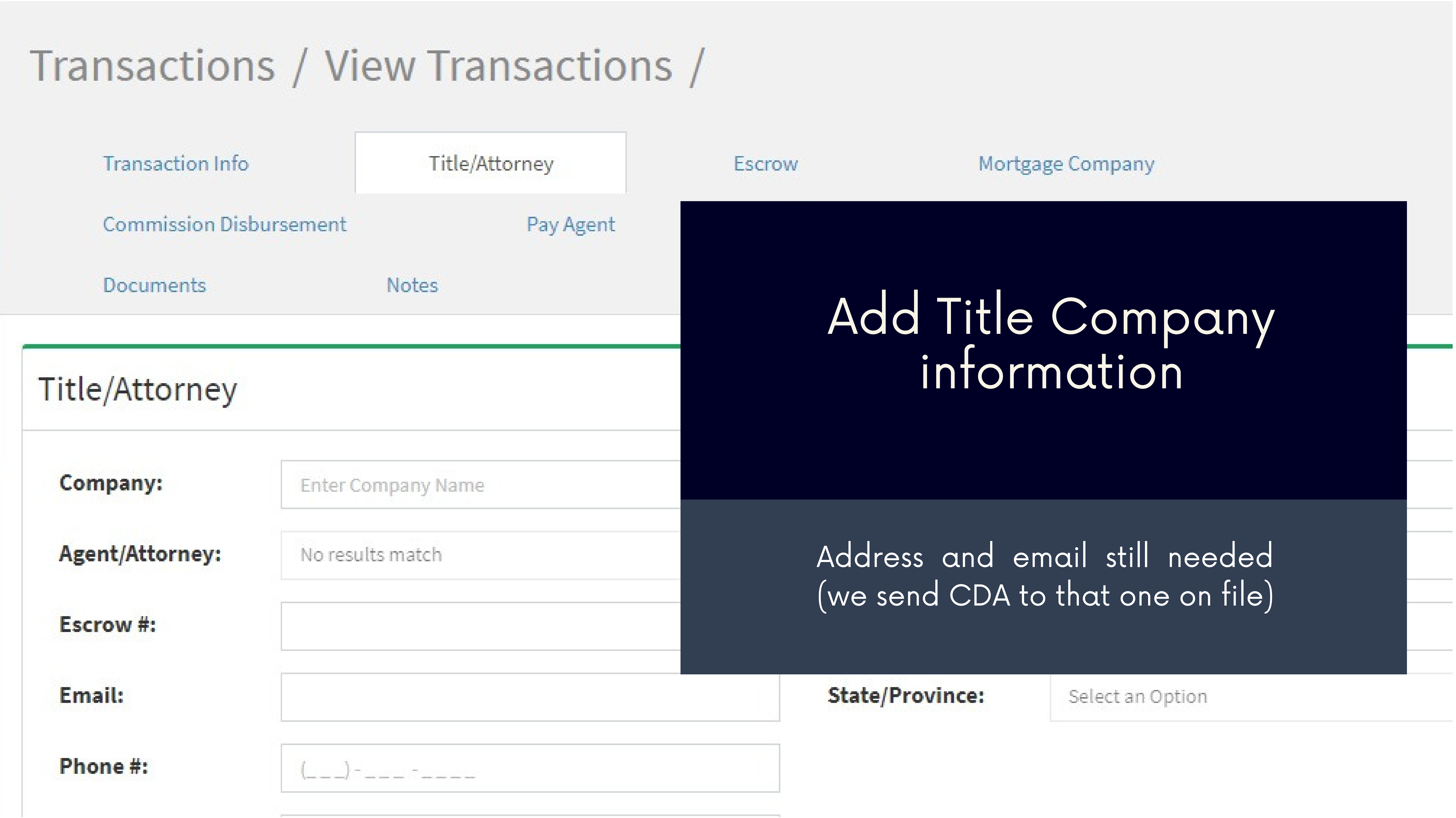
Add applicable task list

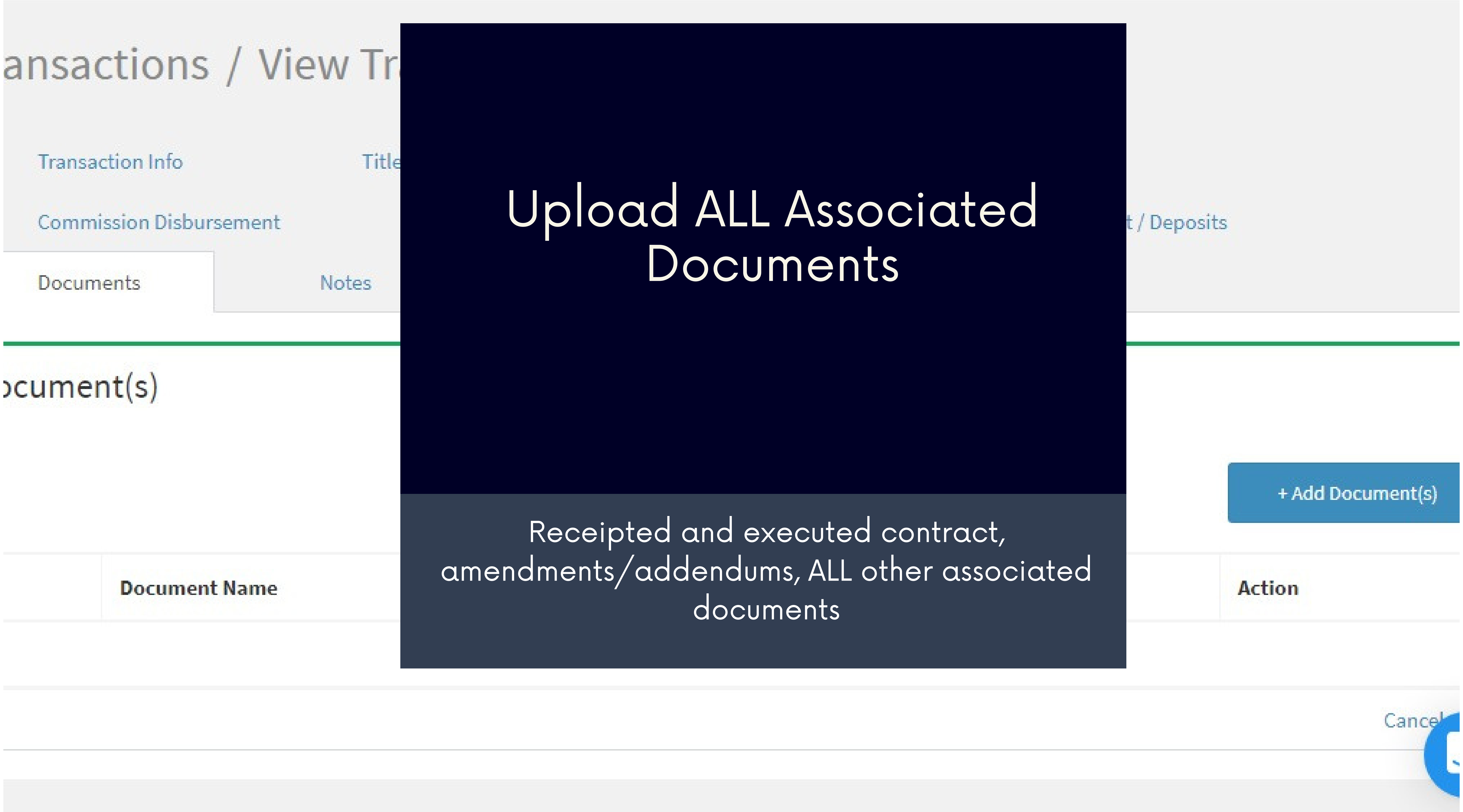
The greyed out tasks require a document to be uploaded to transaction before checking off



Add Title Company information

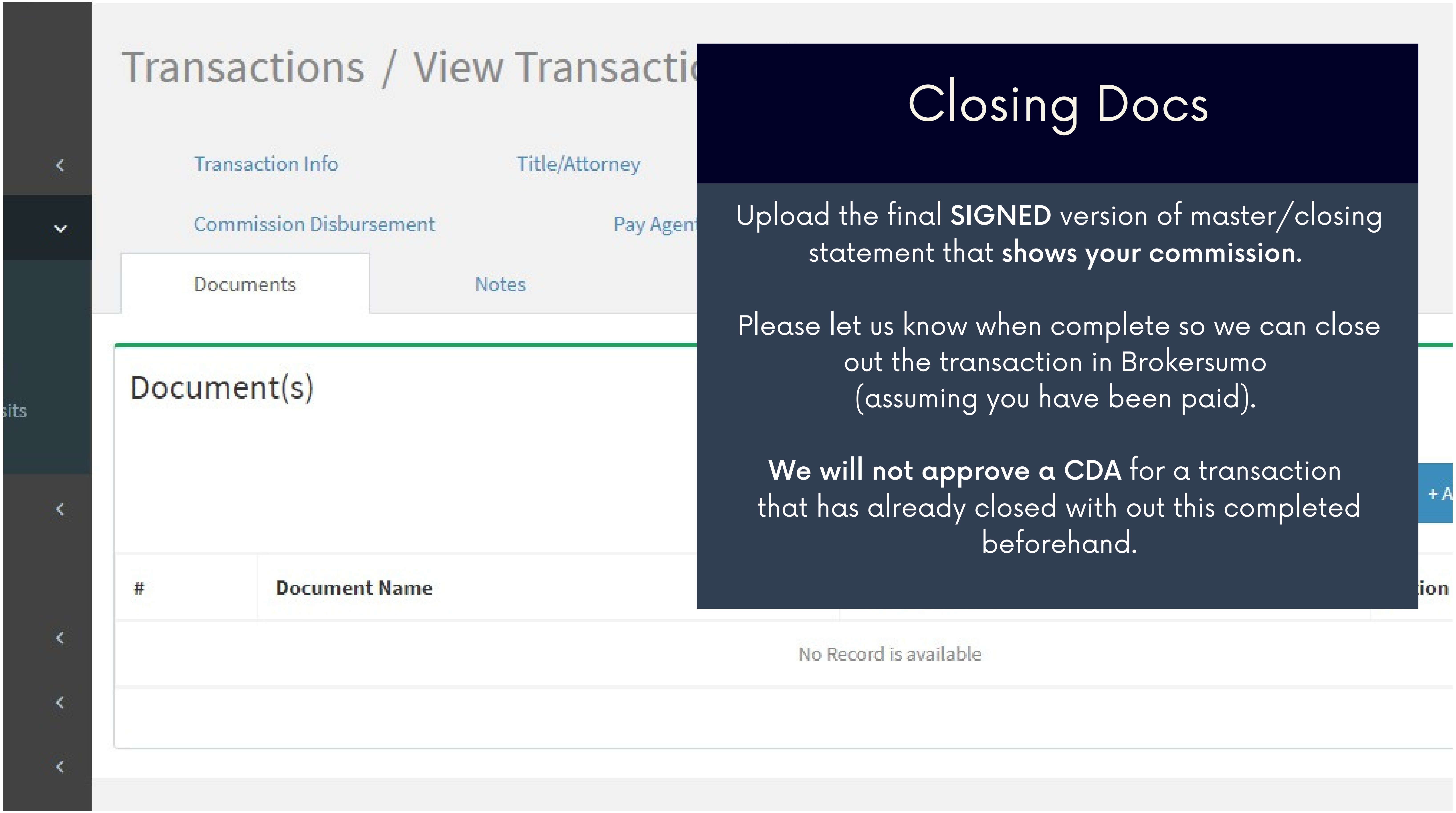
Address and email still needed (we send CDA to that one on file)





Upload ALL Associated Documents

Receipted and executed contract, amendments/addendums, ALL other associated documents



Closing Docs

Upload the final **SIGNED** version of master/closing statement that **shows your commission.**

Please let us know when complete so we can close out the transaction in Brokersumo (assuming you have been paid).

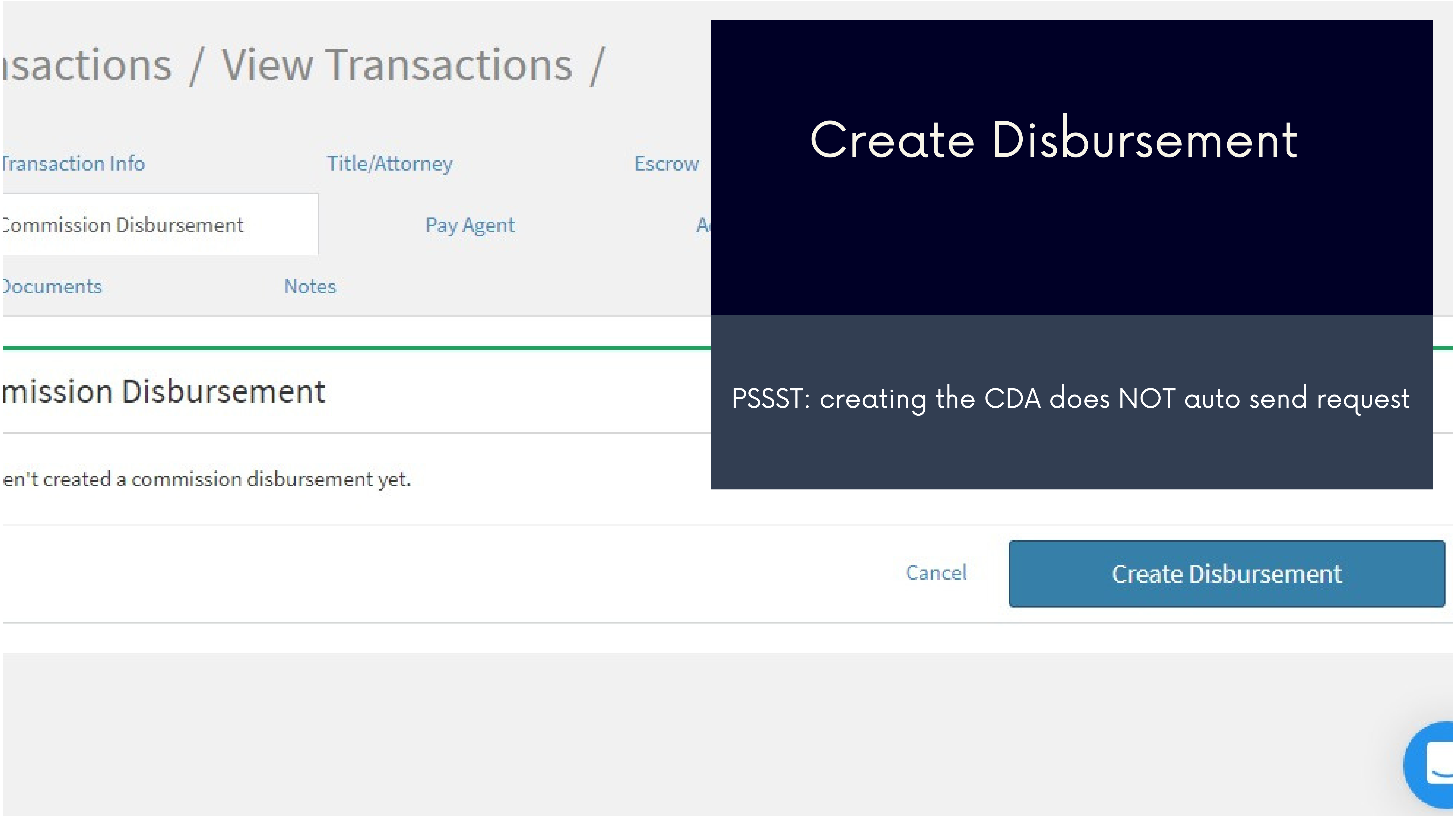
We will not approve a CDA for a transaction that has already closed with out this completed beforehand.

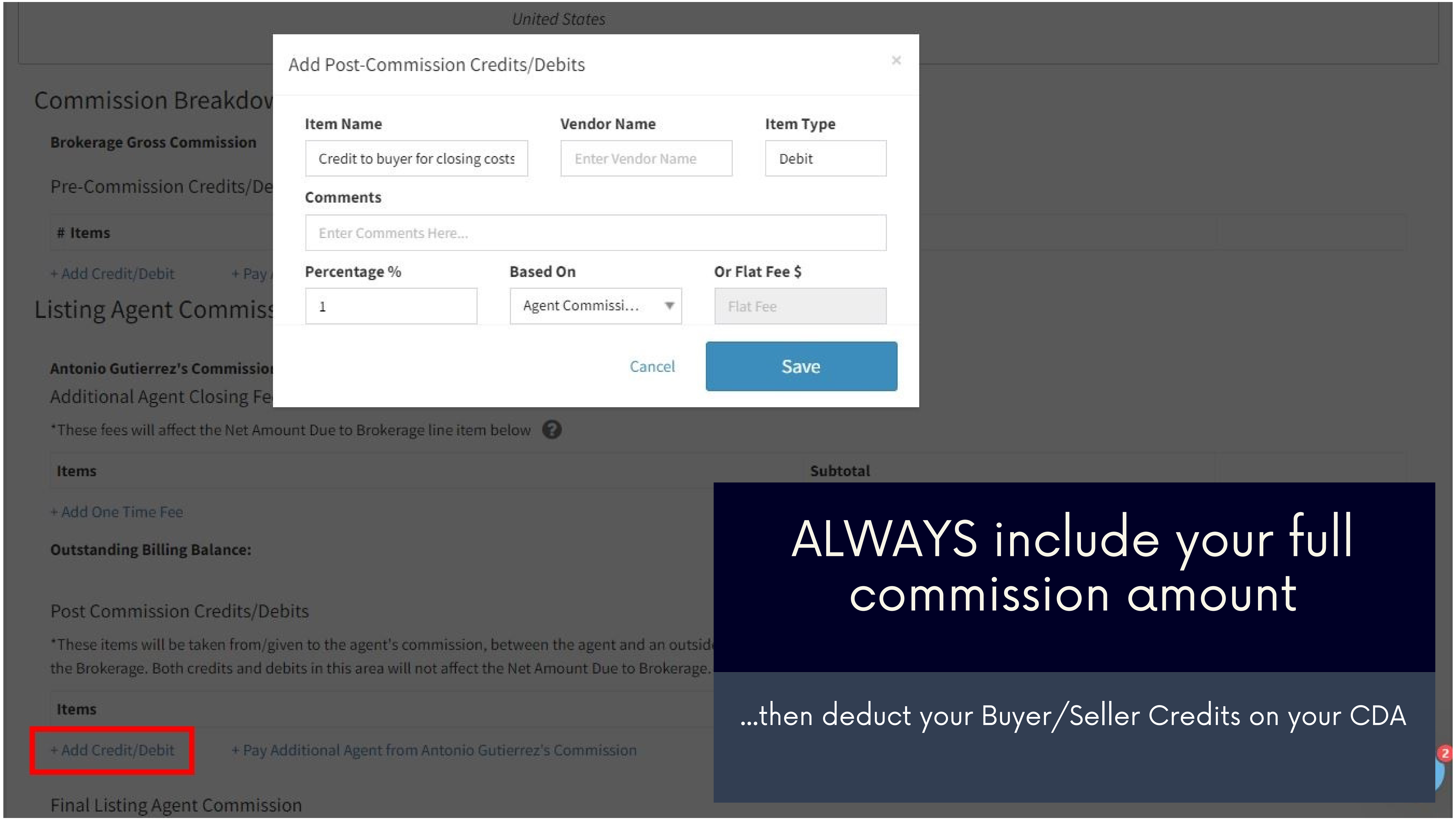
FINAL STEPS

Creating and sending your CDA for approval

Create Disbursement

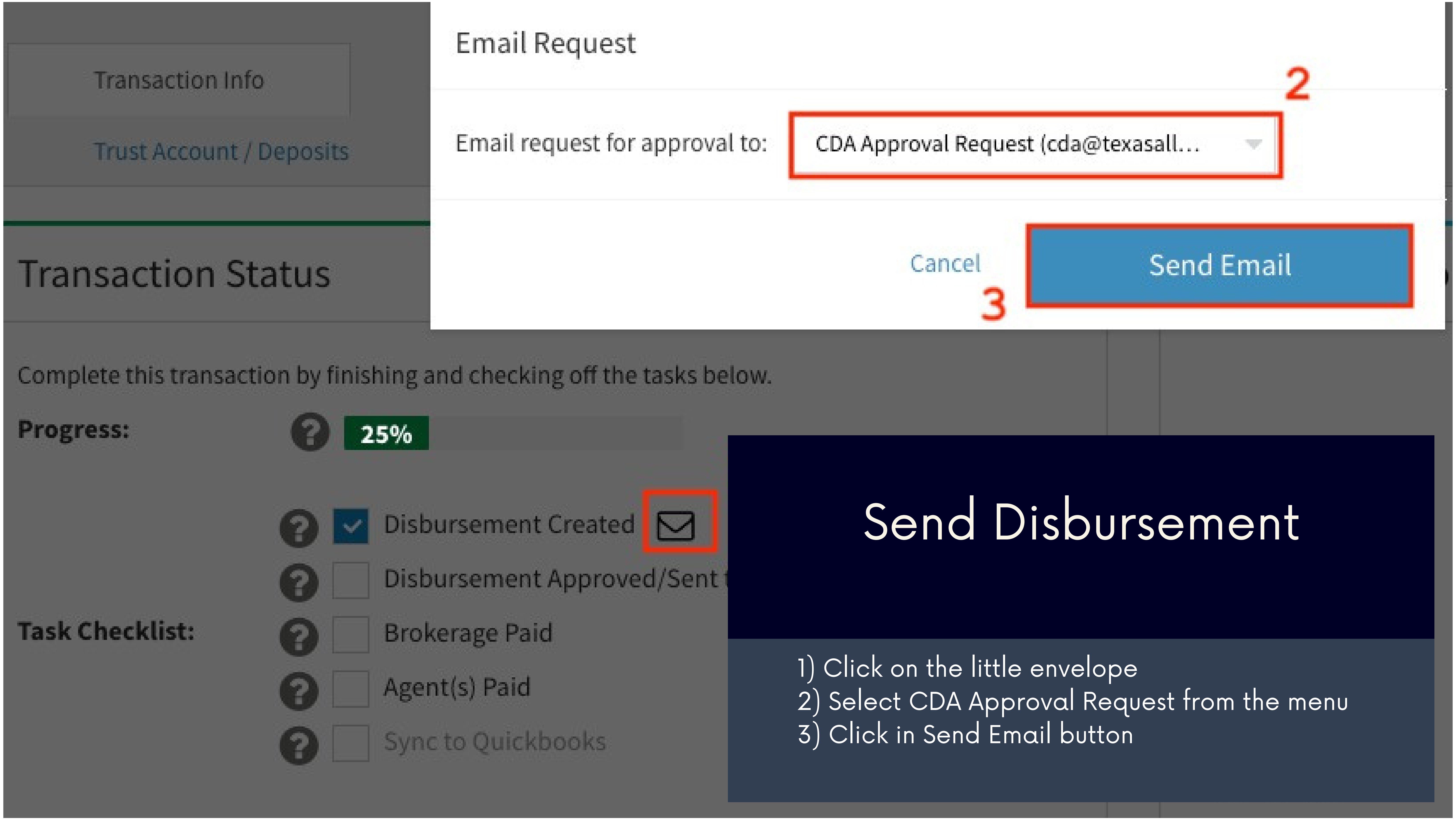
PSSST: creating the CDA does NOT auto send request





ALWAYS include your full commission amount

...then deduct your Buyer/Seller Credits on your CDA



Send Disbursement

1) Click on the little envelope
2) Select CDA Approval Request from the menu
3) Click in Send Email button

You are done!

We need this complete **AT LEAST 5** full business days (M-F) before close to ensure we can review and approve in a timely manner. There is a queue and we must adhere to processes.

You can send the request earlier, but we will not sign and send CDA more than 2 weeks before scheduled close date.

If corrections are emailed to you, please complete, then send another Brokersumo CDA approval request so we know that your transaction is ready to review again.

Transaction Status

Complete this transaction by finishing and checking off the tasks below.

Progress: 50%

Task Checklist:

- [x] Disbursement
- [x] Disbursement
- [ ] Brokerage Paid
- [ ] Agent(s) Paid
- [ ] Sync to Quickb

Approved CDA

You will receive an email letting you know the CDA has been approved (2nd checkbox completed) and an email of the signed approved CDA PDF.

For SALES: title will also be sent a copy.

For LEASES: send the approved CDA PDF to the appropriate parties and follow-up to ensure your commission check is mailed to the office in a timely manner ;)