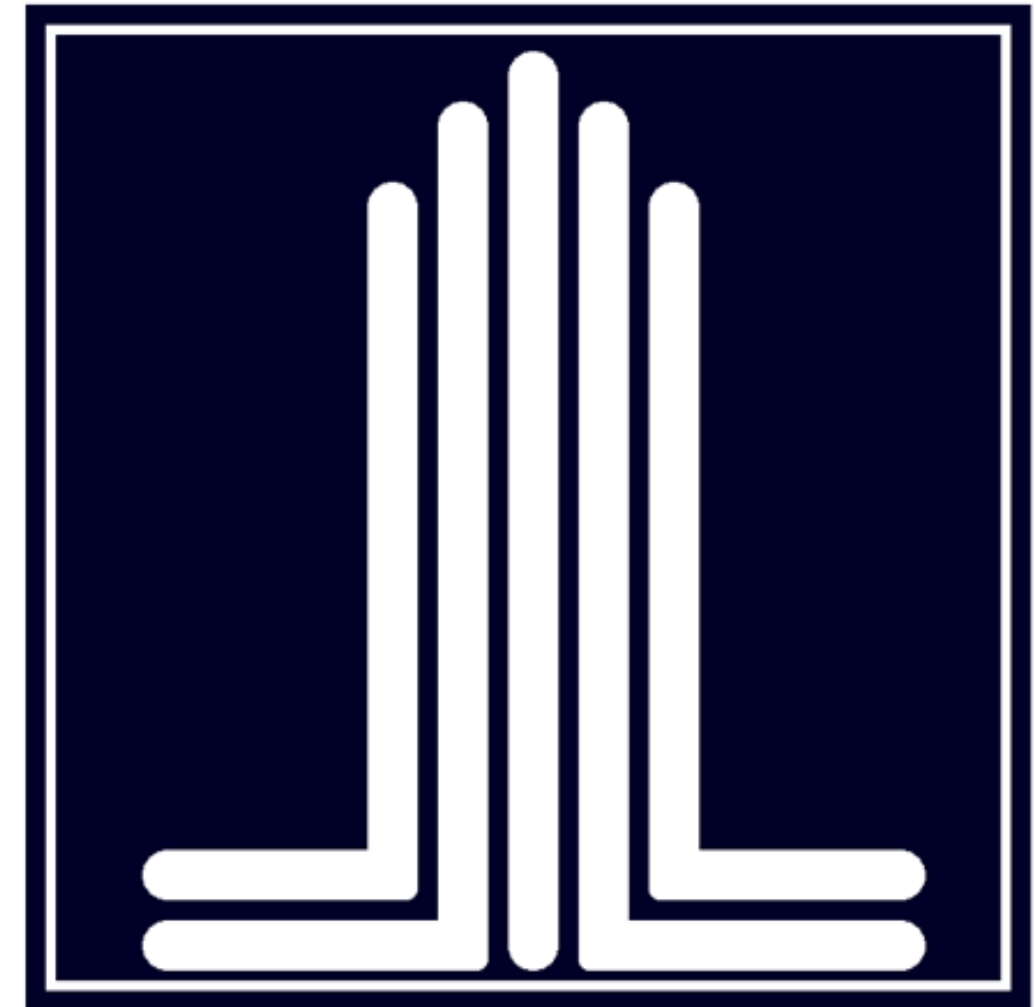


# TRANSACTION MANAGEMENT

Instructions on how to enter your transactions



Texas Ally  
real estate group



Dashboard

Calendar

Agents

Transactions

View Transactions

**Add Transaction**

Create Disbursement

Trust Account / Deposits

MLS

Money

Reports

My Account

Settings

ACH Transfer

## Dashboard



# 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"

<input type="text"/>	<input type="text" value="United States"/>
<input type="text"/>	<input type="text" value="Texas"/>
<input type="text" value="Select an Option"/>	<input type="text" value="(Optional)"/>
<input type="text" value="0"/>	<input type="text" value="(Optional)"/>
	<a href="#">View/Add Co-Broke</a>

# Update Commission Plan if needed based on Lead Origination

Internal team will override this  
if labeled incorrectly

#	Name	Email	Phone	Action
1				 

**Commission Plan  
for this agent:**

**Override Commis**

100% Commission (Agent-Sourced) (100%)

100% Commission (Agent-Sourced) (100%)

OpCity (under 150k) (50%)

OpCity (over \$150k or Lease) (50%)

Texas Ally Lead (70%)

Texas Ally - Alt Source (50%)

Other Vendor Lead (50%)

Create Disbursement

Save Changes 

# Add applicable task list

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

## Task List

Select Task List:

Residential Sale Listing ▲

Progress:

Residential Sale Listing

Residential Lease Listing

- Signed Listing Agreement
- Signed IABS Form
- Get Survey if applicable
- Have Seller fill out Seller's Disclosure Notice and any other potential required disclosures
- MLS Profile Sheet
- Confirm if HOA (or similar) is present and any other rules/restrictions
- Perform CMA
- Yard Sign and Lockbox on property. Collect any special showing instructions that should be included in MLS(e.g. gatecode, alarm).
- Photos of Property Taken
- List on MLS if applicable



# Transactions / View Transactions /

Transaction Info

Title/Attorney

Escrow

Mortgage Company

Commission Disbursement

Pay Agent

Documents

Notes

Add Title Company  
information

## Title/Attorney

**Company:**

Enter Company Name

**Agent/Attorney:**

No results match

**Escrow #:**

**Email:**

**State/Province:**

Select an Option

**Phone #:**

(\_\_\_\_) - \_\_\_\_ - \_\_\_\_

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

Transaction Info

Title

Commission Disbursement

t / Deposits

Documents

Notes

# Upload ALL Associated Documents

Document(s)

+ Add Document(s)

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

Document Name

Action

Cancel

## Transactions / View Transaction

Transaction Info

Title/Attorney

Commission Disbursement

Pay Agent

Documents

Notes

### Document(s)

#	Document Name
No Record is available	

## 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

Transactions / View Transactions /

Transaction Info

Title/Attorney

Escrow

Commission Disbursement

Pay Agent

A

Documents

Notes

## Commission Disbursement

Don't created a commission disbursement yet.

# Create Disbursement

PSSST: creating the CDA does NOT auto send request

Cancel

Create Disbursement



Add Post-Commission Credits/Debits

<b>Item Name</b> Credit to buyer for closing costs	<b>Vendor Name</b> Enter Vendor Name	<b>Item Type</b> Debit
<b>Comments</b> Enter Comments Here...		
<b>Percentage %</b> 1	<b>Based On</b> Agent Commisi...	<b>Or Flat Fee \$</b> Flat Fee

Cancel

Save

**ALWAYS** include your full commission amount

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

## Email Request

Email request for approval to:

CDA Approval Request (cda@texasall... 

Cancel

Send Email

## Transaction Status

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

Progress:



25%



Disbursement Created



Disbursement Approved/Sent



Brokerage Paid



Agent(s) Paid



Sync to Quickbooks

Task Checklist:

## 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.



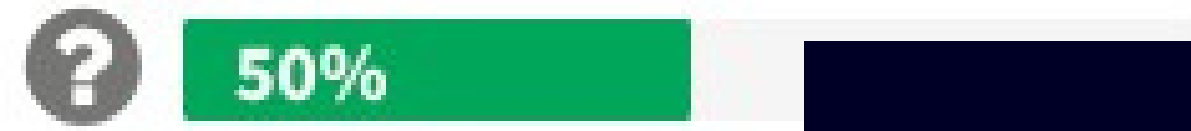
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# Transaction Status

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

**Progress:**



**Task Checklist:**

- Disbursement
- 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 ;)