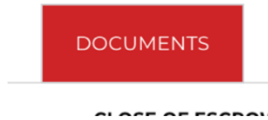
TRANSACTION INSTRUCTIONS

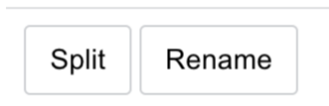
Listing:

1. Split Documents:

*Go to the Documents tab, and you will see pdf of all documents.



*On the right side of the screen, there will be a split button.

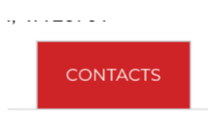


*Once you have clicked on that, type the name of the document, and enter what page number it starts and stops. Then click Split. Make sure all signatures are there, and all information is filled out.

Below is the number of pages each document is for the state of Virginia.

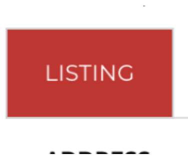
Listing Agreement: 6 pages
Brokerage Fee Notice: 1 page
COA Addendum: 3 pages
POA Addendum: 3 pages
Seller CDIF: 7 pages
Lead: 2 pages
DPOR: 1 page
AICUZ: 1 page
Data Input Sheet: 5 pages
CR Disclosure: 3 pages
SAER: 2 pages
New Business Report: 1 page

2. Verify that the seller’s contact information (phone number and email) is in, the agent should have filled this out when he/she entered the transaction.



3. Change the expiration date to 7 days prior:

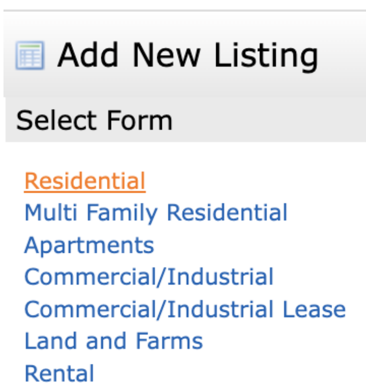
*First, verify that the correct expiration date is in SkySlope by checking the first page of the Listing Agreement. Once you have that verified, go to the Transaction tab, and look for the field labeled “Expiration Date”. Change that to 7 days prior to the actual. We do this so that we can notify/remind the agent that the listing will be expiring soon and how they would want to proceed.



4. Enter New Listing in REIN:

*Download the Data Input Sheet and open REIN MLS in another tab. Click on Matrix and in the blue handlebar at the top of the screen, click on Input.

Then click on Add New. Most listings that are inputted are Residential, but to verify what type of listing this is, be sure to look at the top of the Data Input Sheet. Click on Start with a blank listing and begin entering the information.



5. Were the photos emailed in?

*The agent should have emailed the photos for the listing the same day you received notification that the listing needed to go live. Once you have filled in the listing, click on submit listing and Add/Manage photos. Input the pictures here.

6. Email listing to seller and CC agent and yourself!

*From the listing, on the bottom of the screen click on email. Copy and paste the template below:

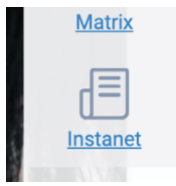
SUBJECT: (address)

BODY:

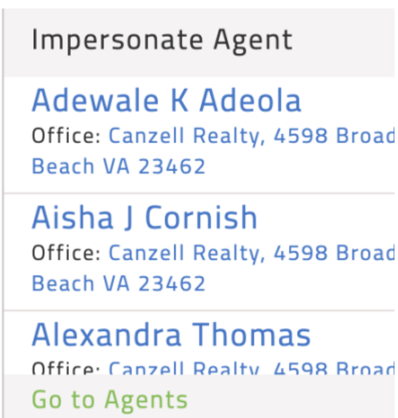
With your permission, we have listed your home. As always, if there are any questions or concerns regarding your listing, please contact us immediately and it will be our pleasure to assist! Please click on the link below to review your MLS listing.

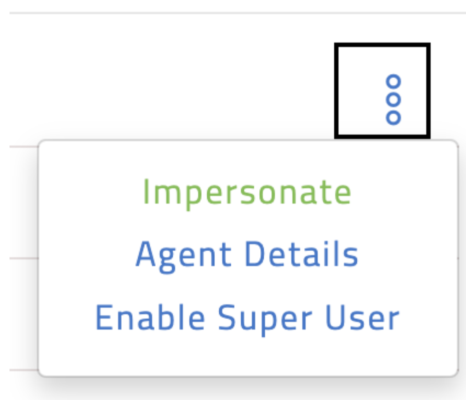
7. Upload DPOR into REIN

*Go back to REIN first page and click on InstaNet.

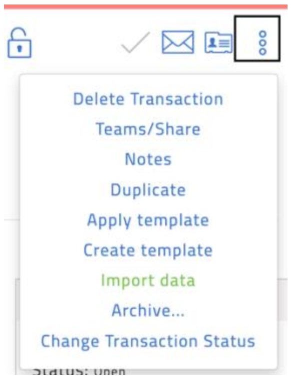


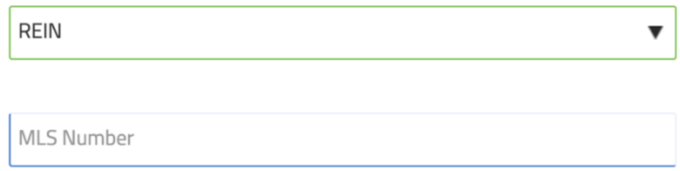
*On the top right of the screen, click on Impersonate Agent, search the agent. Click on 3 little dots and click impersonate. Search for the agent's transaction.





*Click the 3 dots and Import Data. From the drop down, click REIN and input the MLS number.





Go to Documents, add the DPOR document, and fill the star in for Agent MLS View. Title it as Residential Property Disclosure.

8. Upload AICUZ into REIN

*Go back to REIN first page and click on InstaNet. On the top right of the screen, click on Impersonate Agent, search the agent. Click on 3 little dots and click impersonate. Search for the agent's transaction. Click the 3 dots and Import Data. From the drop down, click REIN and input the MLS number. Go to Documents, add the AICUZ document, and fill the star in for Agent MLS View. Title it as Military Air Installation Disclosure Form.

9. Upload LEAD into REIN

*Go back to REIN first page and click on InstaNet. On the top right of the screen, click on Impersonate Agent, search the agent. Click on 3 little dots and click impersonate. Search for the agent's transaction. Click the 3 dots and Import Data. From the drop down, click REIN and input the MLS number. Go to Documents, add the LEAD document, and fill the star in for Agent MLS View. Title it as Lead Paint Disclosure.

10. Upload Brokerage Fee Notice into REIN

*Go back to REIN first page and click on InstaNet. On the top right of the screen, click on Impersonate Agent, search the agent. Click on 3 little dots and click impersonate. Search for the agent's transaction. Click the 3 dots and Import Data. From the drop down, click REIN and input the MLS number. Go to Documents, add the Brokerage Fee Notice document, and fill the star in for Agent MLS View. Title it as Brokerage Fee Notice.

11. Upload POA Addendum into REIN

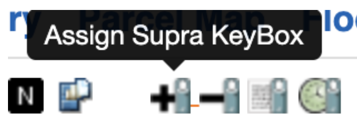
*Go back to REIN first page and click on InstaNet. On the top right of the screen, click on Impersonate Agent, search the agent. Click on 3 little dots and click impersonate. Search for the agent's transaction. Click the 3 dots and Import Data. From the drop down, click REIN and input the MLS number. Go to Documents, add the POA Addendum, and fill the star in for Agent MLS View. Title it as Property Owners Association Addendum.

12. Upload COA Addendum into REIN

*Go back to REIN first page and click on InstaNet. On the top right of the screen, click on Impersonate Agent, search the agent. Click on 3 little dots and click impersonate. Search for the agent's transaction. Click the 3 dots and Import Data. From the drop down, click REIN and input the MLS number. Go to Documents, add the COA Addendum, and fill the star in for Agent MLS View. Title it as Condominium Addendum.

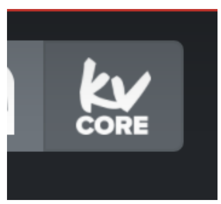
13. Assign Lockbox

*The agent should have provided you the serial number and shackle code for the lockbox, if one is needed. From the listing click on the little lockbox icon under the address. Fill in whatever information they gave you.

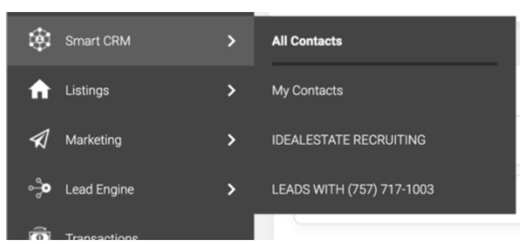


14. Is lead updated in KVCORE?

*From the CanZell Portal, you need to go to KVCORE.



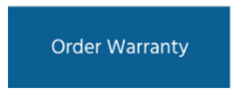
*Click on Smart CRM and go to all contacts.



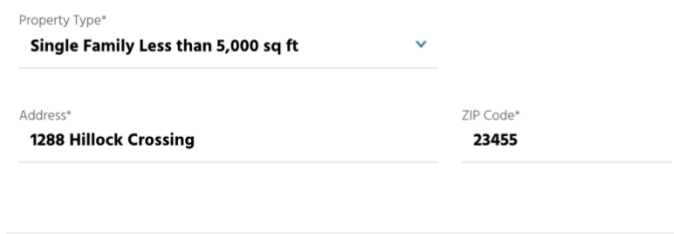
Type in the client's phone number and email address. If the client shows up, that means it is a Company Lead. If the client does not show up, it will be a Personal Lead.

15. Order Home Warranty:

*On the first page of the CR Disclosure, it will tell you if the client would like to add the $70 HVAC upgrade or not, make note of this. Log into First American Home Warranty and click on Order Warranty.



Select the property type, usually Single Family Less than 5,000 sq ft. Copy and Paste the home address and click next.



If the client chose to add the HVAC upgrade, click on Seller's Heating, A/C & Ductwork. If the client did not choose to add this, click on Seller's basic; click next. Type in the Seller's First and Last name, email address, and phone number. Select the agent represents the seller and find that agent in the drop down. Click next, and the warranty was ordered!

16. Add Sign:

*Email the agents requesting if they wanted a yard sign ordered or not. Email htom2770@gmail.com to put the yard sign up. Copy and paste the below template.

SUBJECT: UP – (address)

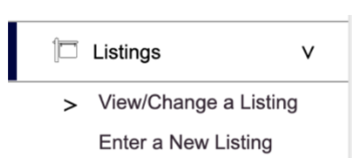
BODY: Hey Tom!

Please put a sign UP – (address)

Thanks! ☺

17. Add to Showing Time

*Sign into Showing Time. From the left-hand menu, click View/Change a Listing. Search for the address.



*If the address is there, click the listing. Make any changed the agent requested, refer to the first page of the Data Input Sheet. Click Save Changes. If the address is not there, click Enter a New Listing. Fill out all required fields, then make any changes the agent requested. Click Save Changes.

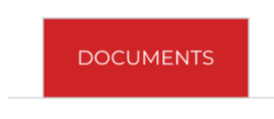
18. Email agent about expiration date coming soon.

*You will receive notification about the listing getting ready to expire. Email the agent requesting what needs to be done.

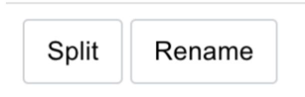
Seller Under Contract:

1. Split Documents:

*Go to the Documents tab, and you will see pdf of all documents.



*On the right side of the screen, there will be a split button.



*Once you have clicked on that, type the name of the document, and enter what page number it starts and stops. Then click Split. Make sure all signatures are there, and all information is filled out.

Below is the number of pages each document is for the state of Virginia.

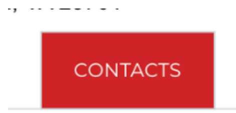
Purchase Agreement: 15 pages
Brokerage Fee Notice: 1 page
Copy of EMD: 1-2 pages
Pre-Approval Letter/Proof of Funds: 1-3 pages
DPOR: 1 page (if applicable)
AICUZ: 1 page (if applicable)
PICA: 3 pages (if applicable)
LEAD: 2 pages (if applicable)
POA Addendum: 3 pages (if applicable)
COA Addendum: 3 pages (if applicable)
Contact Sheet: 1-2 pages (to get this, on the top right of the screen, click on the drop-down arrow and Download Summary. Drag and drop)
Copy of Termite Letter: 1-5 pages
Order COA/POA Docs: 1 page (ONLY USED FOR SELLER SIDE)
Resale Certificate: 4-5 pages (may vary)
POA Receipt: 2 pages (if applicable)
COA Receipt: 2 pages (if applicable)
Final ALTA: 1-8 pages (may vary)
Final Commission Scan: 3-4 pages (Allison uploads)
PICRA: 2 pages (if applicable)
CDIF: 7 pages
CR Disclosure: 3 pages
Buyer Broker: 2 pages (ONLY USED FOR BUYER SIDE)
Client Infor Form: 1 page

2. Verify correct ratified and closing date:

*Look on page 1 for the ratified date and page 4 for the closing date on the Purchase Agreement. Verify it matches what the agent inputted.

3. Verify all contact:

*Be sure to verify all contact information was added by the agent. You can verify this by going to the contacts tab.



4. Is the lead updated in KVCORE?

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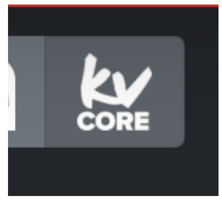
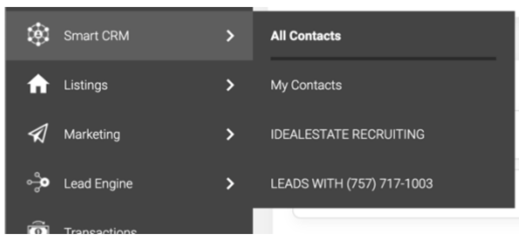


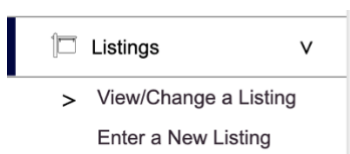
Click on Smart CRM and go to all contacts.



Type in the client's phone number and email address. If the client shows up, that means it is a Company Lead. If the client does not show up, it will be a Personal Lead.

5. Update Showing Time

*Log into Showing Time. From the left-hand menu, select View/Change a Listing.

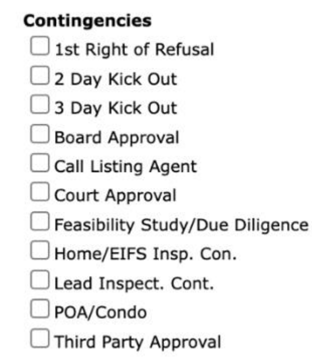


Search and select the listing. In the comments section, enter ACTIVE CONTINGENT or UNDER CONTRACT, whichever is applicable. Active Contingent means that we have accepted a ratified offer on the property, but the transaction is contingent upon items being completed. Once all contingencies have been removed, it will be moved to pending, which also means under contract. This means the deal is on and good to go! It is rare for someone to back out of a deal after is have been moved to pending, but it can happen!

6. Add contingencies to REIN

*Locate the contingencies on page 8-9 of the Purchase Agreement. Open REIN MLS in a separate tab. Click on Matrix and Input.

Select the office the agent is in, select the agent, and select the listing. Click on residential (it may say something else, depends on what the Data Input Sheets states). Open the Property tab, scroll to the bottom, and check the applicable contingencies. Submit the listing.



7. Send congrats letter to seller and CC agent:

*You MUST attach the ratified contract to the email. Copy and paste the template below:
Hello!

I wanted to congratulate you on receiving a ratified contract on your property. I am the Branch Office Administrator for CanZell Realty and will be working on your contract as we prepare for closing. Included is a copy of the contract for your records.

You can also go to www.canzell.com/vendors for full list of utility providers in the Hampton Roads Area for you to use to turn your utilities off after closing.

There are many things that require a team effort on both our parts to successfully close on your property. Go to https://canzell.com/seller-closing-plan/ and it will provide what you should expect between now and when we close the transaction. It is very important, so please review the list carefully.

Your agent and I will be in contact with you throughout the process and will make every effort to make this a smooth transaction.

Please feel free to contact me with any questions you have as the process moves forward. It will be my pleasure to assist at any time.

I look forward to working with you.

Sincerely,

8. Send welcome email to attorney, lender, and CC agent:

*Attach the Purchase Agreement, EMD, Brokerage Fee Notice, Contact Sheet, CanZell Wiring Instructions, and CR Disclosure. Copy and paste the template below:

Hello,

I will be assisting AGENT on the closing of ADDRESS. Attached to this email, you will find a copy of the ratified contract and contact sheet with all parties' information.

The expected settlement date is DATE (can be retrieved from page 4 of Purchase Agreement)

The transaction fee is: $395.00. Please make sure this is included on the settlement statement.

The home inspection is due: DATE (Page 2 of PICA; if applicable)

The termite inspection is due: DATE and is to be ordered by WHO (Page 7 of Purchase Agreement; if applicable)

Please reply all when responding to any further emails on this property to help improve communication between all parties.

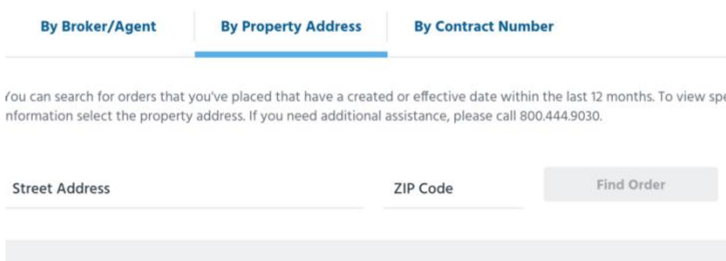
Please note: We require all commission checks to be wired. Please include our wiring instructions with the seller's package to the Buyer's attorney. The Password is Morgan2020.

Thank you and I look forward to working with all of you.

9. Send PICRA/Termite Letter/Addendums/etc to Attorney as they are received.

10. Does the buyer need to be added to the Home Warranty?

*Email the agent requesting the information. If yes, go to First American Home Warranty website, find the address, and click edit. Be sure to add the name of the buyer and email address. Click save. SEND THE INVOICE TO THE ATTORNEY!



11. Confirm wiring instructions with buyer's closing, is closing on schedule?

*Request the buyer's closing attorney email address from listing and selling agent. Attach the wiring instructions.

Hello!

Please see attached wiring instructions for CanZell Realty 🙂 The password is: Morgan2020. Please note that we require all commissions to be wired! In the event that you are unable to wire, please mail checks to 4598 Broad Street Virginia Beach Virginia 23462. Please email boaall@canzell.com once the wire has been sent or the check has been mailed 🙂

Thank you!

12. Verify pending status in REIN:

*Mark pending in REIN once ALL contingencies have been REMOVED!

*Log into REIN MLS, click Matrix and Input. Select the office, agent, and listing.

*Click Mark as Pending.

Change to Pending

*Enter required information, it can all be found within the Purchase Agreement.

Price Pending: page 1 of Purchase Agreement
Date Off Market: ratified date, page 1 of Purchase Agreement
Finance Code: page 1 of Purchase Agreement
Selling Agent: page 15 of Purchase Agreement

13. Did file close? Call sign down.

*If you have received the ALTA from the agent/attorney, email Tom and request the sign down. Copy and paste the template below:

SUBJECT: DOWN - ADDRESS

BODY:

Hey!

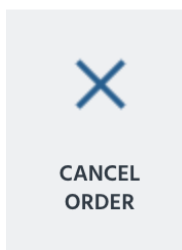
Please put the sign DOWN – ADDRESS

Thanks! ☺

14. Cancel Seller Home Warranty

*Open First American Home Warranty in another tab. Locate your order and select it. Do you see buyer information filled in?

If NO – click CANCEL WARRANTY on the top right of the screen. The reason will be No Longer Providing Warranty, and that is ALL!!



If YES and the status is awaiting funds – DO NOT CANCEL THE WARRANTY!!!

15. Verify marked SOLD in REIN:

*Open REIN MLS. Click Matrix and Input.

Select the office, agent, and listing. Click Mark as Sold. Enter required information, it can be found on the final ALTA. When completed, take a screenshot and save it as a pdf.

Change to Sold

Price Closed: page 1 of ALTA
Date Closed: page 1 of ALTA
Buyer Name: 'Borrower' page 1 of ALTA
Verify all other information from Purchase Agreement

Buyer Under Contract:

1. Split Documents:

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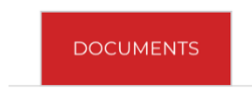

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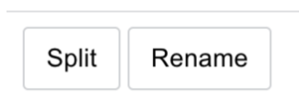

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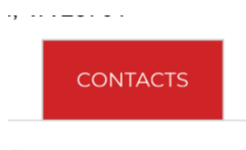

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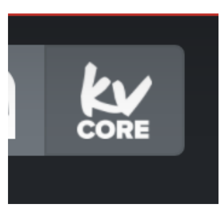
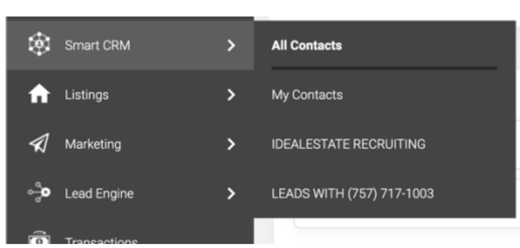


*Click on Smart CRM and go to all contacts.

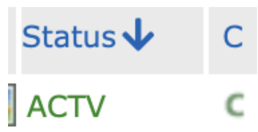


*Type in the client's phone number and email address. If the client shows up, that means it is a Company Lead. If the client does not show up, it will be a Personal Lead.

5. Verify Active Contingent in REIN MLS:

*Go to REIN MLS and Matrix.

*Search the property number and FIRST NAME OF STREET. Verify that the property is in the Active Contingent status.



If not, send Data Error Report.

6. Send welcome letter to client and CC agent:

*Attach Ratified Contract! Before sending the email, go to the CR Disclosure document and look on page 2 for the checkbox. If it is NOT marked send the first email below. If it IS MARKED OFF, send the second email below.

Hello,

I wanted to congratulate you on receiving a ratified contract for the property you are purchasing. As you may already know, I am the Branch Office Administrator for the Canzell Realty Team and will be working on your contract to get it ready for closing. Included is a copy of the contract for your records.

You can also go to canzell.com/vendors for a full list of utility and frequently used telephone numbers in the Hampton Roads Area for you to use to turn your utilities on after closing.

Canzell Realty is partners with GEICO, Nationwide, and State Farm to help you with your homeowners insurance needs. One of them will be in contact with you to provide a free insurance quote for your new home.

GEICO

GEICO has been serving our clients for years. Their offices have created an individualized and personal relationship with our clients. They go through each client separately to create and make sure they are getting the best out of their homeowners insurance. They are located locally in the area and know what coverage is necessary in making sure you are covered for any natural disasters, flood zones, and frequent home repairs.

Greg Holestin
757.838.5050
gholestin@geico.com

Nationwide Insurance

With over 30 years of experience and a stellar team, my agency is ready to help you choose the best and most affordable insurance options that are personalized to your individual needs. Call or stop by so we can start working for you right away. We can't wait to meet you!

John C Clyburn Insurance Agency - Nationwide Insurance
Website: nationwide.com/john-clyburn
Phone: 757-490-2346
email: tom@clyburnins.com

ADT
As the second largest ADT Authorized Dealer in the U.S. and one of the fastest-growing segments of the ADT business family, we've developed an understanding of the needs of our clients, partners and employees you'll find nowhere else.

When you work with Safe Haven, you can depend on our team of high-level, forward-thinking men and women committed to creating a home security system tailored to your needs. We look forward to forming real relationships with our clients, our partners and each other and serving as a solid resource for home security. Most importantly, we're motivated by keeping you safe.

Jason Casebolt
jcasebolt@mysafehaven.com
757-947-2043

State Farm

We are a local office that offers personalized quotes, not only for your Home, but also as Mortgage Protection Life Insurance.

We understand the needs of our homeowners, businesses, and investors, and can tailor a complimentary quote for your current situation.

We take great pride in meeting the needs of our Valued Customers, in fact, our team gives you our personal cell phone numbers so you can reach us, as Your Agents, directly, any time (day or night) with questions or concerns you may have.

Contact us today and allow us to provide you with the peace of mind knowing you are getting the Best Protection for You and Your Family, at the Best Rates!

Joe Sictor
joe.sictor.w8ln@statefarm.com
757.650.9394

Your agent and I will be in contact throughout the process and will make every effort to make this a smooth transaction.

Please feel free to contact me with any questions you have as the process moves forward. It will be my pleasure to assist at any time!

I look forward to working with you.

Hello,

I wanted to congratulate you on receiving a ratified contract for the property you are purchasing. As you may already know, I am the Branch Office Administrator for the Canzell Realty Team and will be working on your contract to get it ready for closing. Included is a copy of the contract for your records.

You can also go to www.canzell.com/vendors for a full list of utility and frequently used telephone numbers in the Hampton Roads Area for you to use to turn your utilities on after closing.

Canzell Realty is partners with GEICO, Nationwide & Safe Haven Security to help you with your homeowners insurance & home security needs. Please see the contact info below with our preferred insurance providers that you can contact to provide you a free insurance quote for your new home.

GEICO
GEICO has been serving our clients for years. Their offices have created an individualized and personal relationship with our clients. They go through each client separately to create and make sure they are getting the best out of their homeowners insurance. They are located locally in the area and know what coverage is necessary in making sure you are covered for any natural disasters, flood zones, and frequent home repairs.

Greg Holestin
757.838.5050
gholestin@geico.com

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Phone: 757-490-2346
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Safe Haven Security
Not all ADT Authorized Dealers are alike. Don’t settle for anything but the best for your security.

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Sam Downs
(201) 373-2842
sdowns@mysafehaven.com

Your agent and I will be in contact throughout the process and will make every effort to make this a smooth transaction.

Please feel free to contact me with any questions you have as the process moves forward. It will be my pleasure to assist at any time!

I look forward to working with you!

7. Send insurance email and CC agent:

*Check page 2 of the CR Disclosure. If the box is NOT checked off, send the clients information (name, email, and phone number). If the box IS CHECKED, DO NOT send the clients information. Copy and paste the template below.

SUBJECT: Here is a new buyer transaction for [AGENT'S NAME]
BODY:
BUYER NAME

Purchase of: ADDRESS

This transaction is due to close on: DATE

Please see the attached client information form.

Sincerely,

8. Send welcome letter to attorney & CC agent:

Attach Purcahse Agreement, EMD, Brokerage Fee Notice, CR Disclosure, Contact Sheet. Copy and Paste the template below.

Hello,

I will be assisting AGENT on the closing of ADDRESS. Attached to this email, you will find a copy of the ratified contract and contact sheet with all parties' information.

The expected settlement date is DATE (page 4 of Purchase Agreement)

The transaction fee is $395.00. Please make sure this is included on the settlement statement.

The home inspection is due DATE (page 2 of PICA, if applicable)

The termite inspection is due DATE and is to be ordered by WHO (page 7 of Purchase Agreement)

Please reply all when responding to further emails on this property to help improve communication between all parties.

Please note: We require all commission checks to be wired. Please let me know if you need wiring instructions.

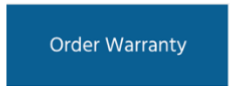
If you have any questions, do not hesitate to call or email me.

Thank you and I look forward to working with all of you.

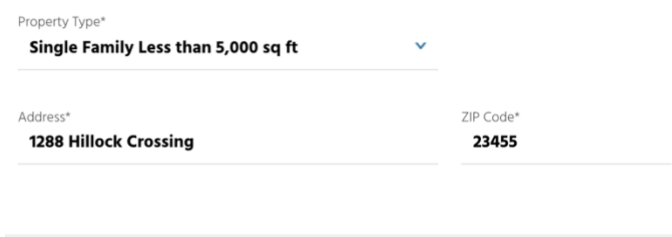
9. Send PICRA/Termite Letter/Addendums/etc to Attorney as they are received.

10. Does the buyer need to be added to the Home Warranty?

*Email the agent requesting the information, and if they would like the $70 HVAC Upgrade. If yes, go to First American Home Warranty website, click on Order Warranty.



Select the property type, usually Single Family Less than 5,000 sq ft. Copy and Paste the home address and click next.



If the client chose to add the HVAC upgrade, click on Seller's Heating, A/C & Ductwork. If the client did not choose to add this, click on Seller's basic; click next. Type in the buyer's first and last name, email address, and phone number. Select the agent represents the BUYER and find that agent in the drop down. Click next, and the warranty was ordered! SEND THE INVOICE TO THE ATTORNEY!

11. Confirm wiring instructions with buyer's closing.

Attached wiring instructions

Hello!

Please see attached wiring instructions for CanZell Realty 🙂 The password is: Morgan2020. Please note that we require all commissions to be wired! In the event that you are unable to wire, please mail checks to 4598 Broad Street Virginia Beach Virginia 23462. Please email boaall@canzell.com once the wire has been sent or the check has been mailed 🙂

Thank you!

12. Verify pending status in REIN

*Check once you have noticed that all contingencies have been removed! Go to REIN MLS and Matrix. Search the property number and FIRST NAME OF STREET. Verify that the property is in the Active Contingent status. If not, send Data Error Report.

13. Verify marked SOLD

*Check once you received the final ALTA! Go to REIN MLS and Matrix. Search the property number and FIRST NAME OF STREET. Verify that the property is in the Active Contingent status. If not, send Data Error Report.

SOLD