zipTMS®

User’s Guide

Listing Under Contract

Real Estate One®

FAMILY of COMPANIES

REAL ESTATE / MORTGAGE / INSURANCE / TITLE
RELOCATION / RENTAL MGMT

LISTING UNDER CONTRACT

Agent Steps

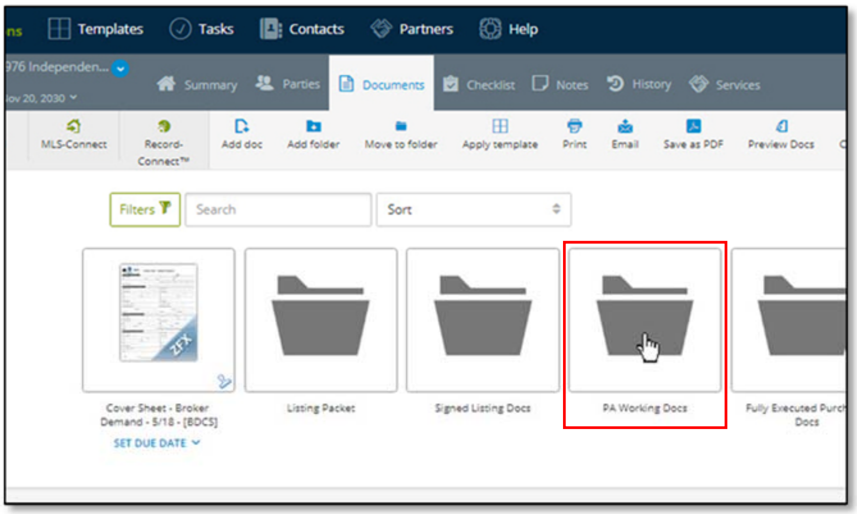
- Present and negotiate offers.
- In the case of multiple offers, create a folder named the buyer's name and Buyers' agent's name to contain each offer (both names are necessary for future reference).
- *All documents, for accepted and rejected offers, must be retained*
- Place fully executed documents for the accepted offer in the **Fully Executed Purchase Docs** folder.
- Complete the **Cover Sheet – Broker Demand form**.
- Submit the file to your office administrator by selecting the **Approved** button from the **Summary page**.
- Add a comment telling your office administrator what is being submitted (**i.e. Listing under contract, please process**)
- Manage all contingencies and due dates.
- Coordinate with Title Company, Seller and other Broker to proceed to closing.

Present and negotiate offers.

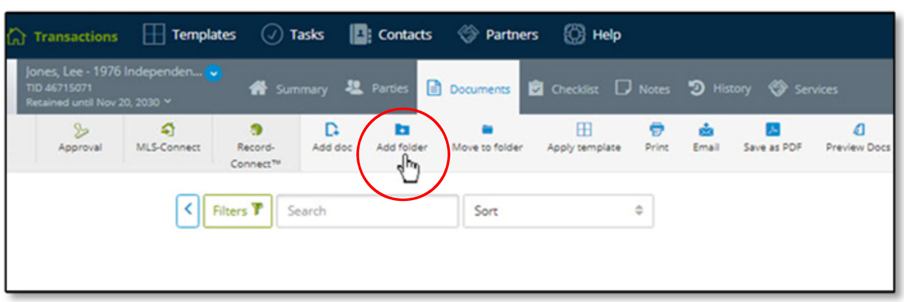
In the case of multiple offers, create a folder named the buyer's name and buyers' agent's name to contain each offer (both names are necessary for future reference). You can create these folders inside of the **PA Working Docs folder** or you can create them in the main **Documents folder** and move them to the **PA Working Docs folder** by dragging and dropping them or by using the **Move to Folder** option.

All documents, for accepted and rejected offers, must be retained.

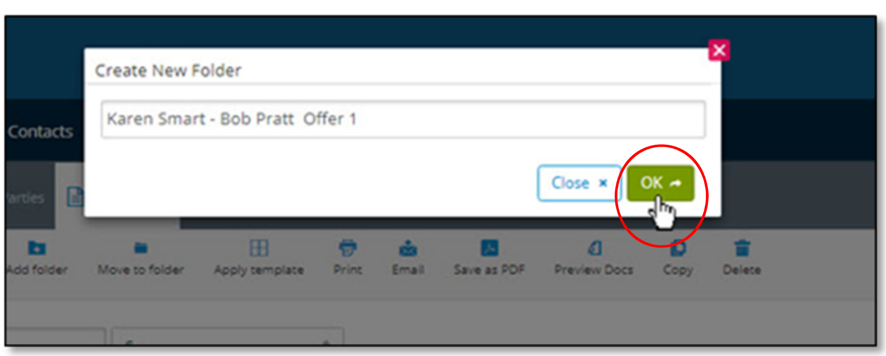
To create a folder inside of your **PA Working Docs folder** for each of your offers, open your **PA Working Docs folder**.



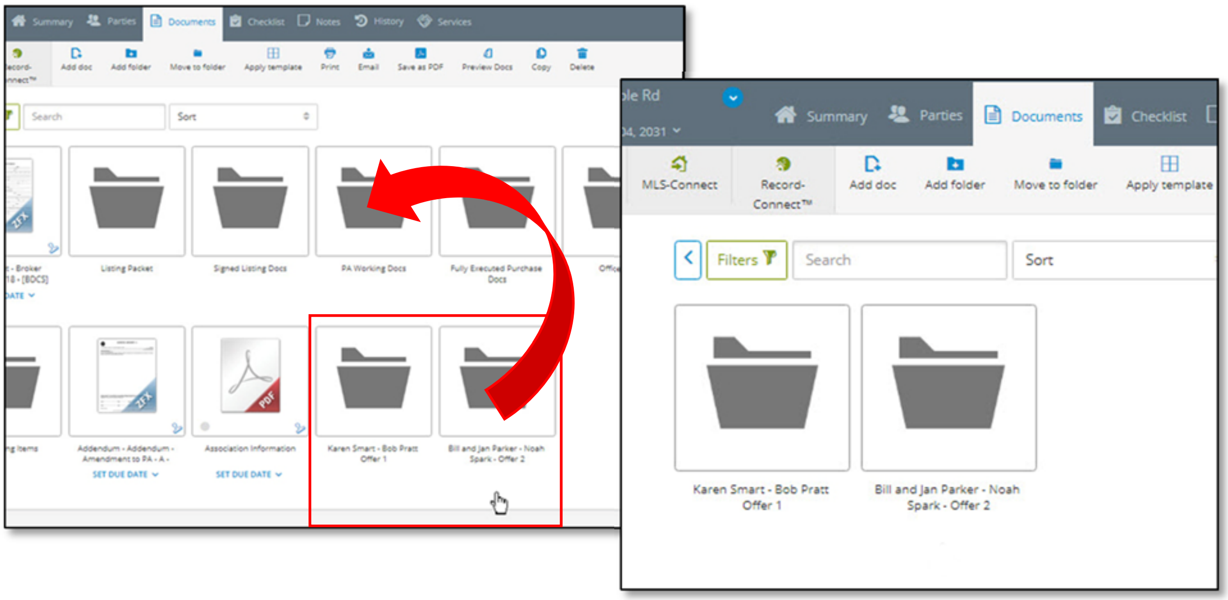
Choose **Add Folder**.



Enter a name for the folder. Use the buyer's name and buyers' agent's name.
Choose **Ok**.



If you create your individual offer folders in your **Documents folder**, move them to the **PA Working Docs folder** by dragging and dropping them or by using the **Move to Folder** option.



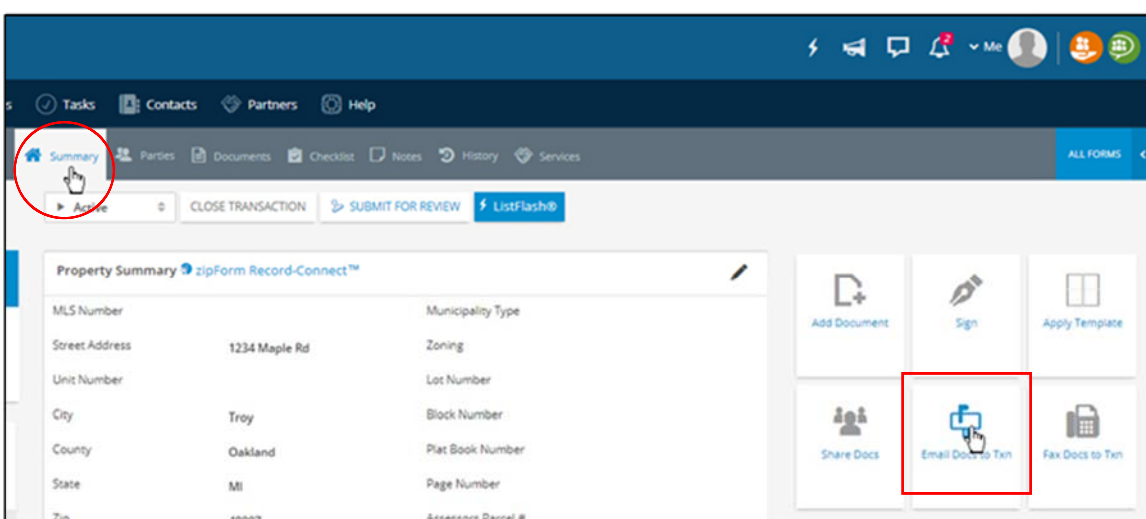
Add all of the documentation for each offer directly into the offer folder by using the **Add doc** option within the folder or by **emailing the documents to the transaction** and then moving them to the appropriate folder. You can also **drag and drop the documents** from your computer right into the open folder.

For the accepted offer, place all of the fully executed documents in the **Fully Executed Purchase Docs folder**.

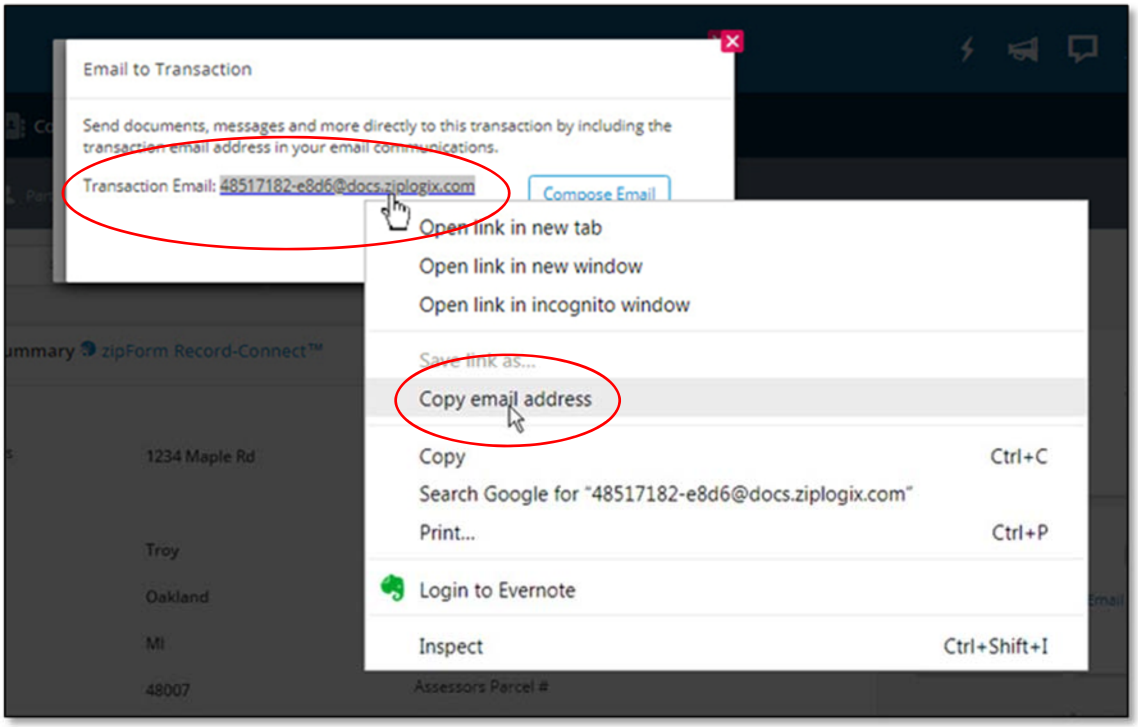
If you received the offer via email, from another agent or from your scanner, you can forward the email on to your transaction's email address.

To forward an email directly to your transaction, you will need your transaction's email address.

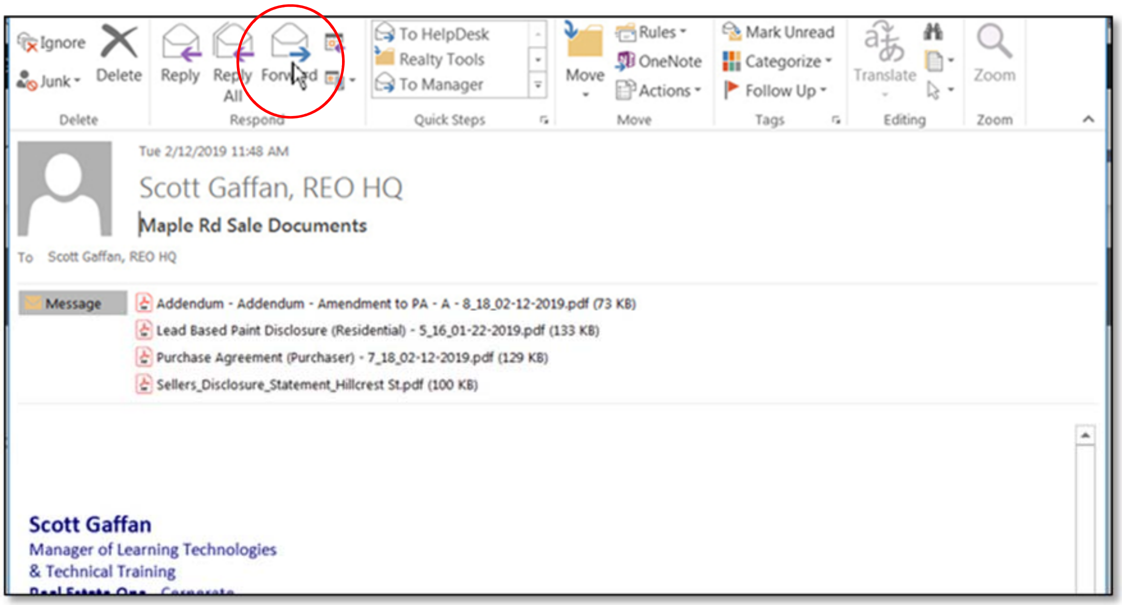
Select the **Summary** tab then choose **Email Docs to Txn**.



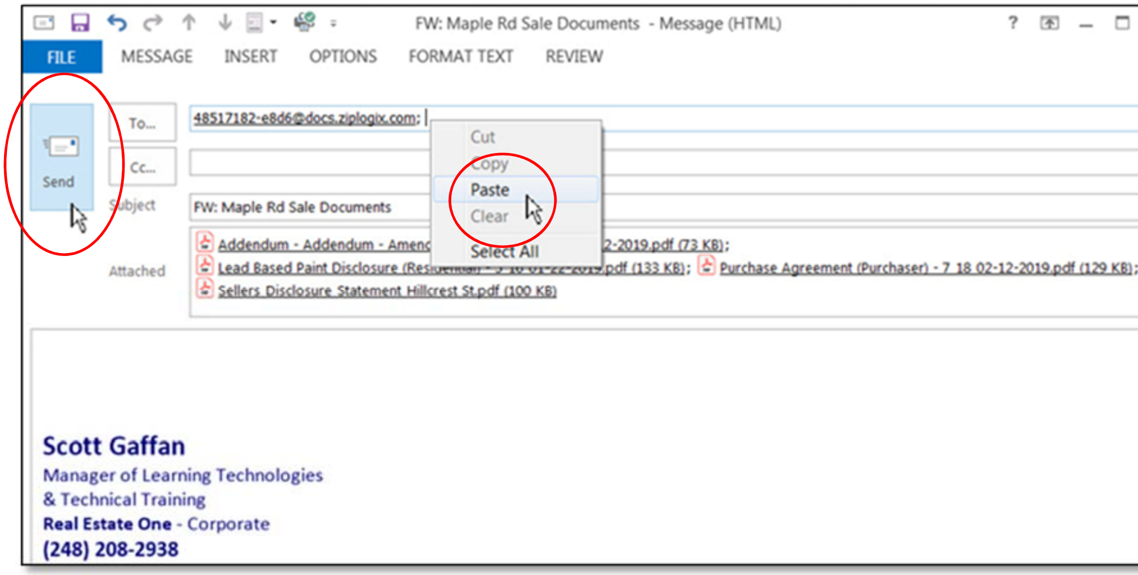
Select the transaction's email address. Right click on the selected address and choose **Copy** or **Copy email address**.



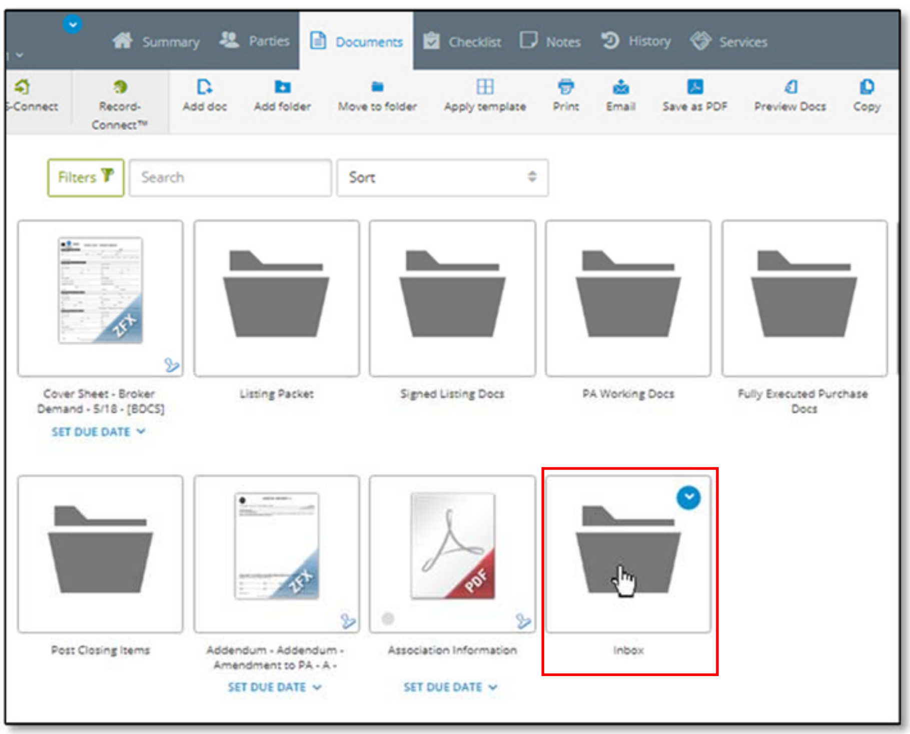
Open the email that you received containing all of the sale documents and choose **Forward**.



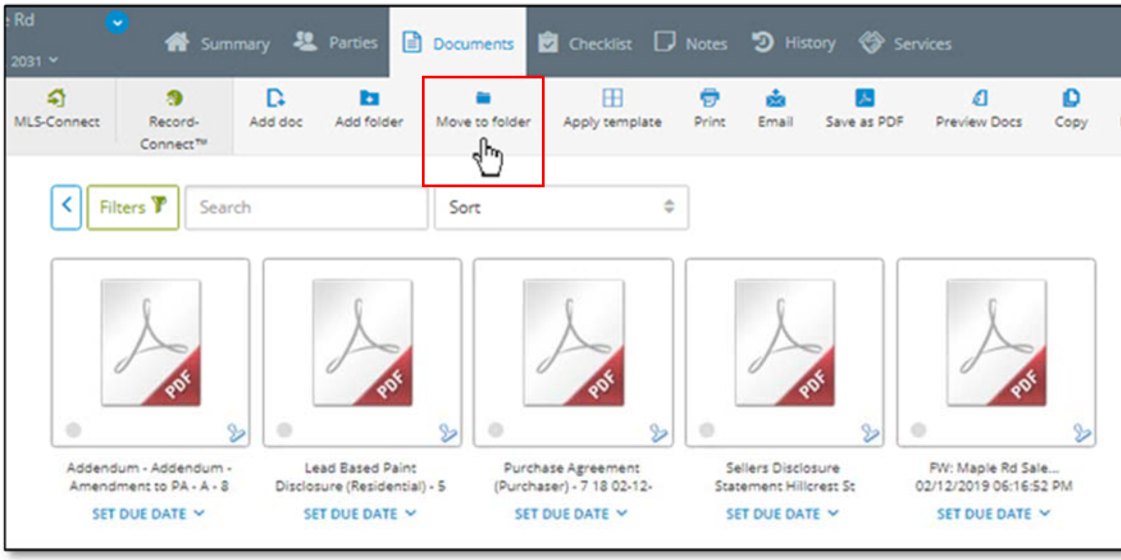
Paste your transaction's email address into the **To** field and choose **Send**.



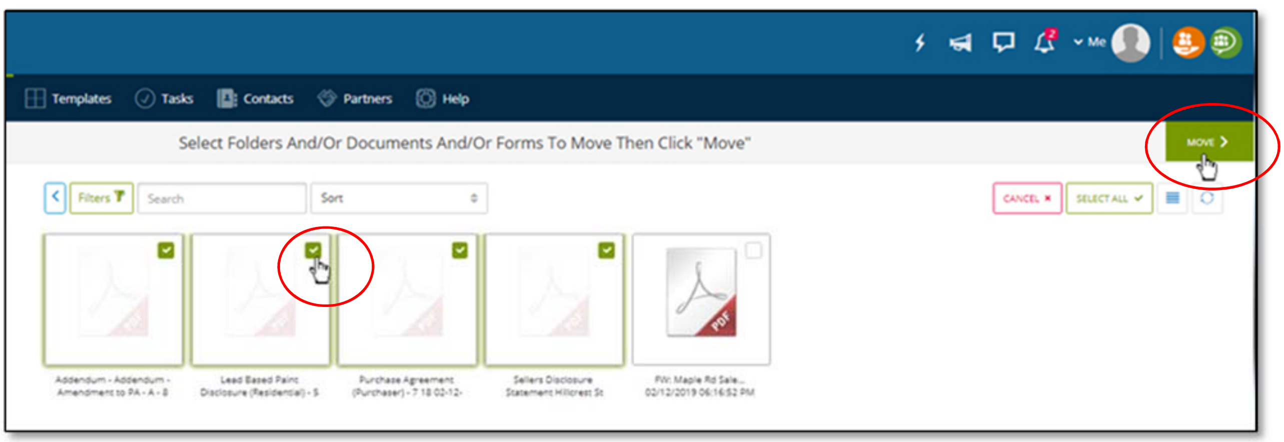
Go back into your transaction's **Document's folder** and a new folder called **Inbox** should be added to your list of folders. Select it to open it.



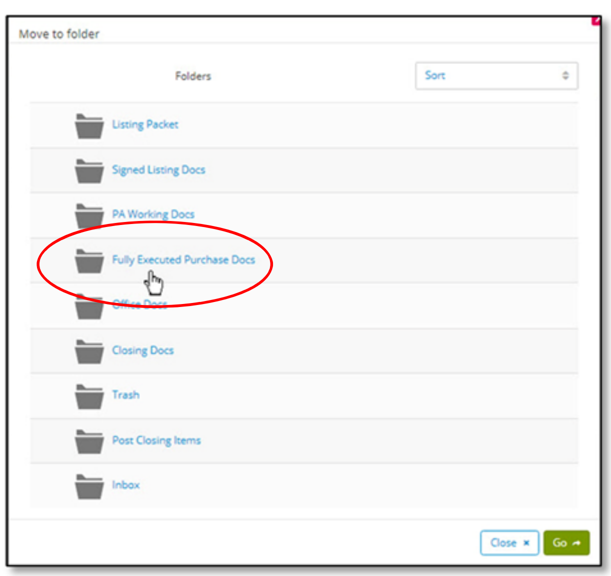
All of the documents that were attached to your email should be in your inbox folder as well as a PDF of the email message itself. Choose **Move to Folder** to move your documents to the **Fully Executed Purchase Docs folder**.



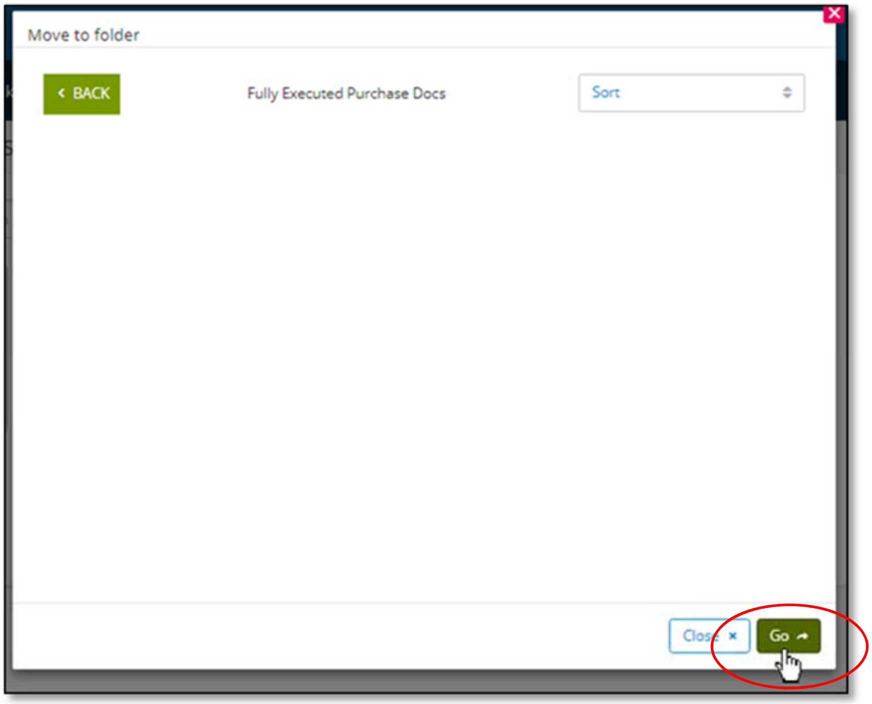
Select the documents that you would like to move and then choose **Next**.



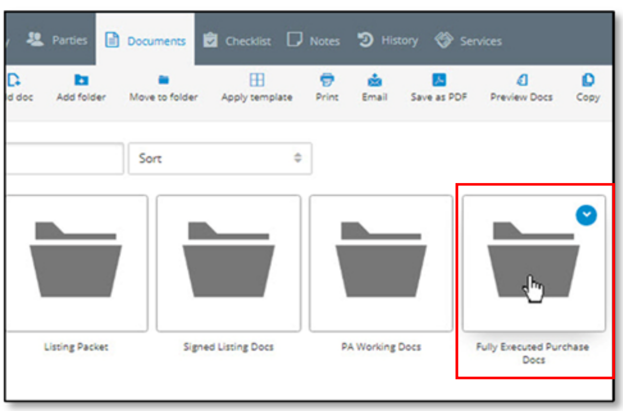
Select the folder that you would like to move the documents to, the **Fully Executed Purchase Docs folder**.

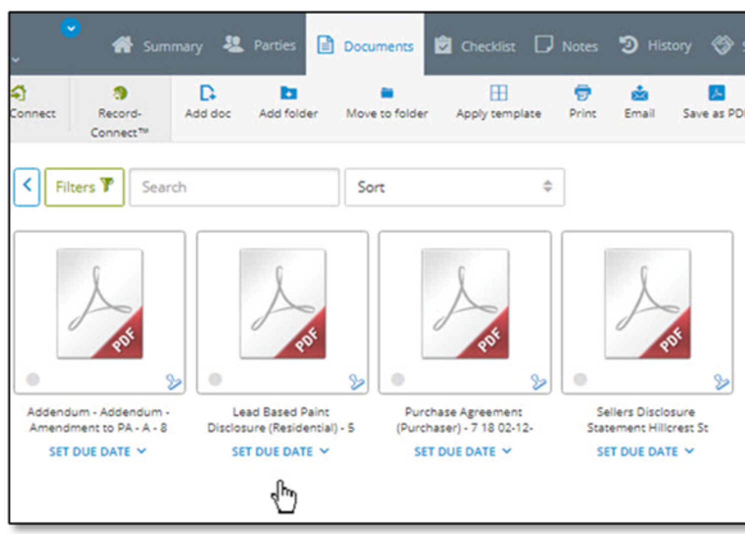


Choose **Go**.

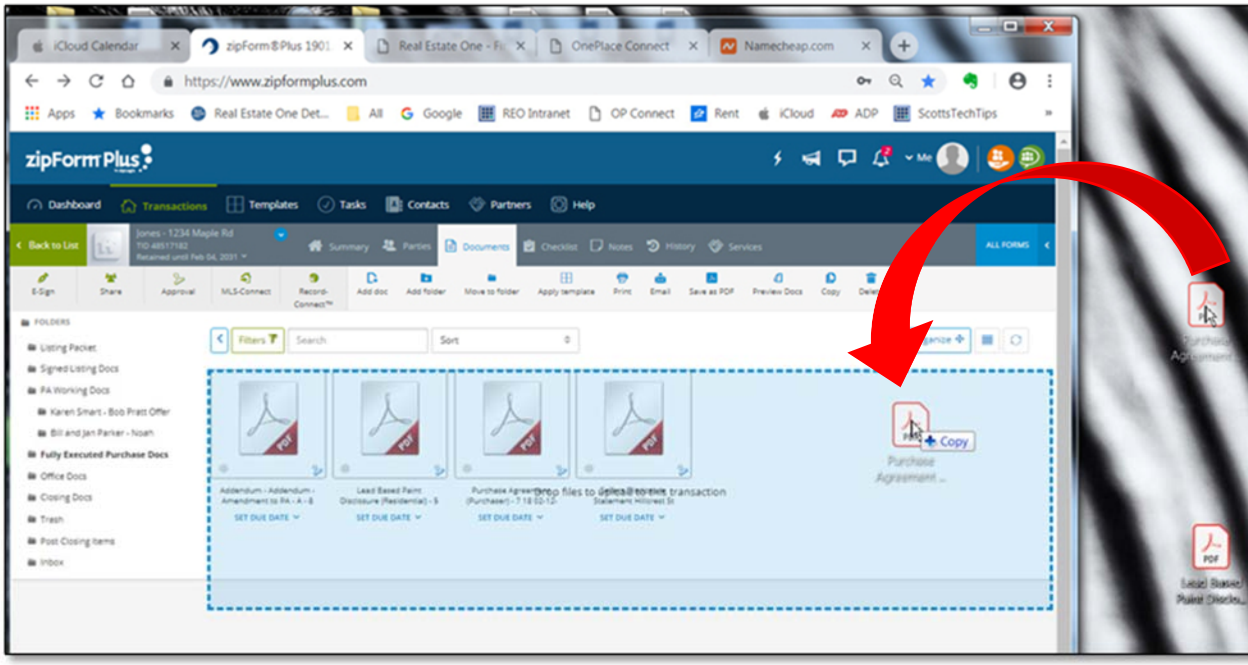


Open your **Fully Executed Purchase Docs folder** and check to make sure that the files all transferred successfully.

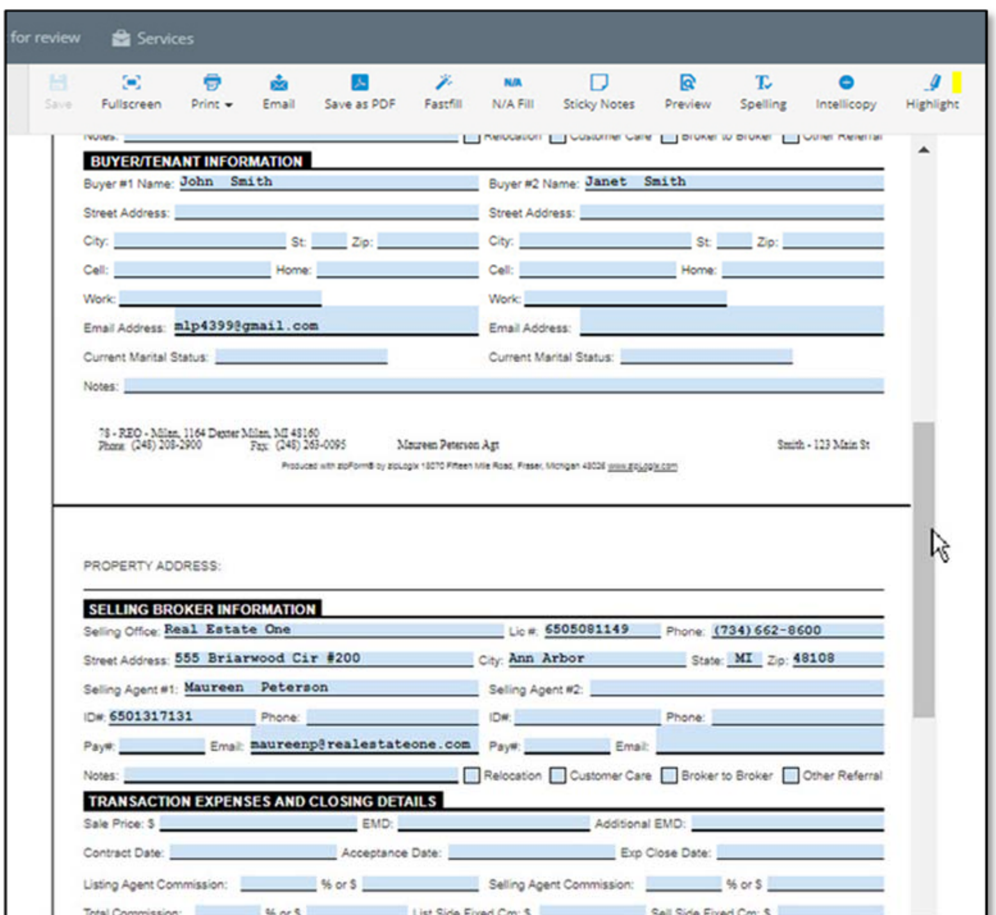




If your documents are on your computer, you can also drag and drop them into your **Documents folder** or directly into your **Fully Executed Purchase Docs folder** directly from your computer.



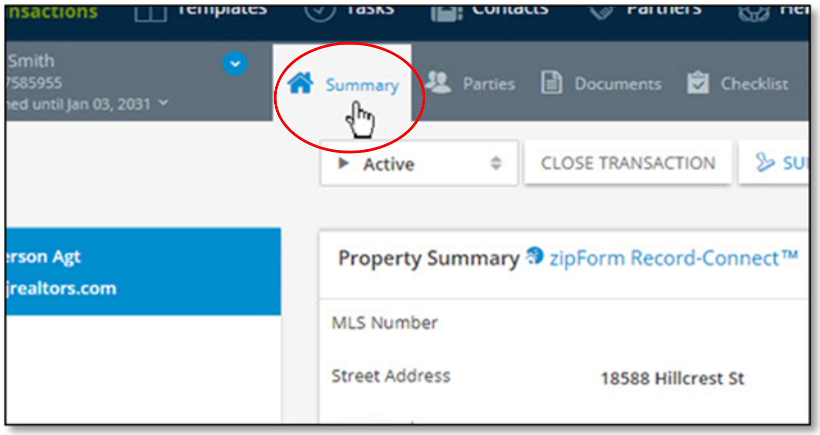
Update the **Cover Sheet – Broker Demand form** with the information from your accepted offer.



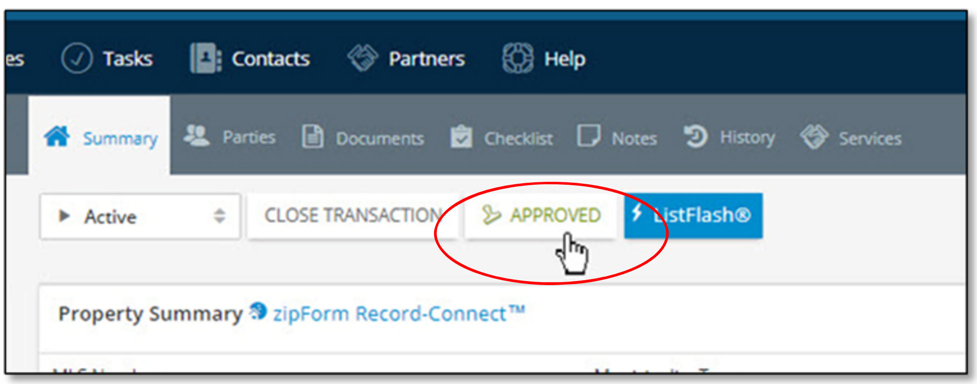
Submit for Review

Complete a final review of all documents to make sure that everything is where it needs to be. When you've completed your final documents review, you're ready to send your transaction on to be reviewed by your office administrator.

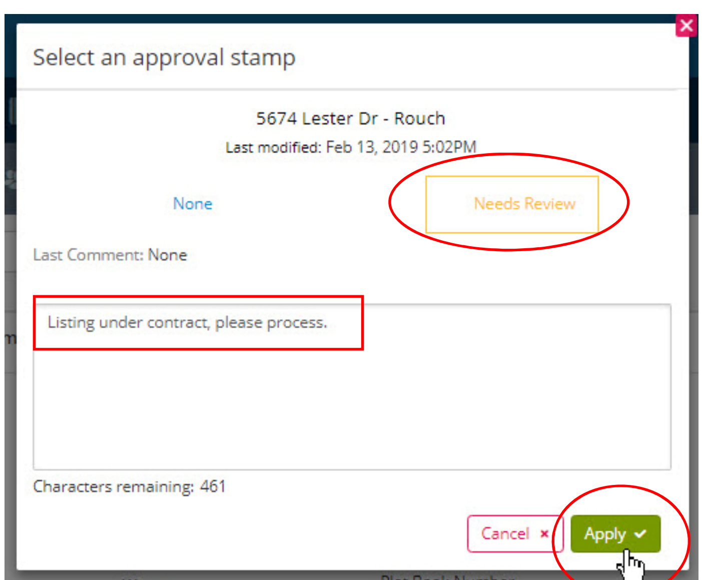
Return to the **Summary** page of your transaction by selecting **Summary**.



Since this transaction was already approved as a new listing, the **Submit For Review** button now says **Approved**. Choose **Approved.**



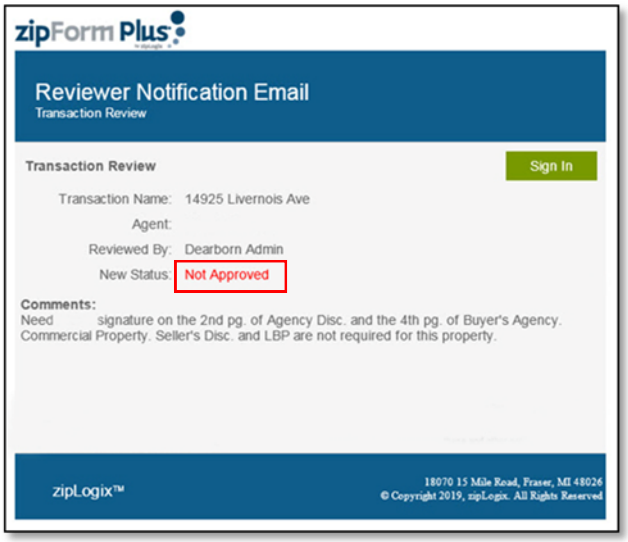
Add a comment to notify your office administrator what is being submitted - **Listing under contract, please process**. Choose **Needs Review** and then **Apply** to submit your transaction for review.

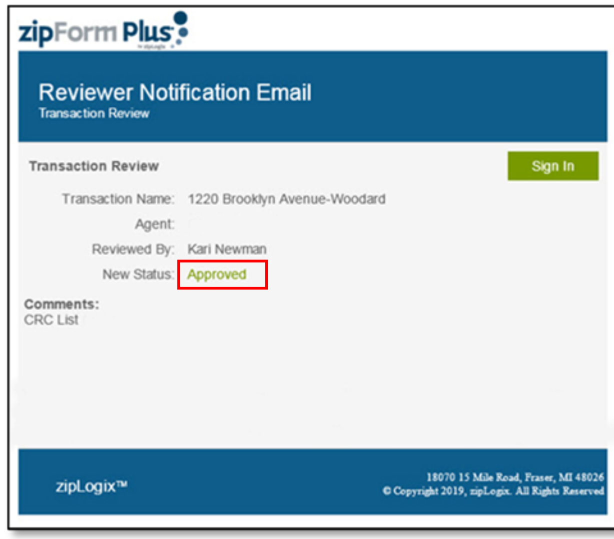


Your office administrator will review your transaction. You will receive a notification when the review has been completed.

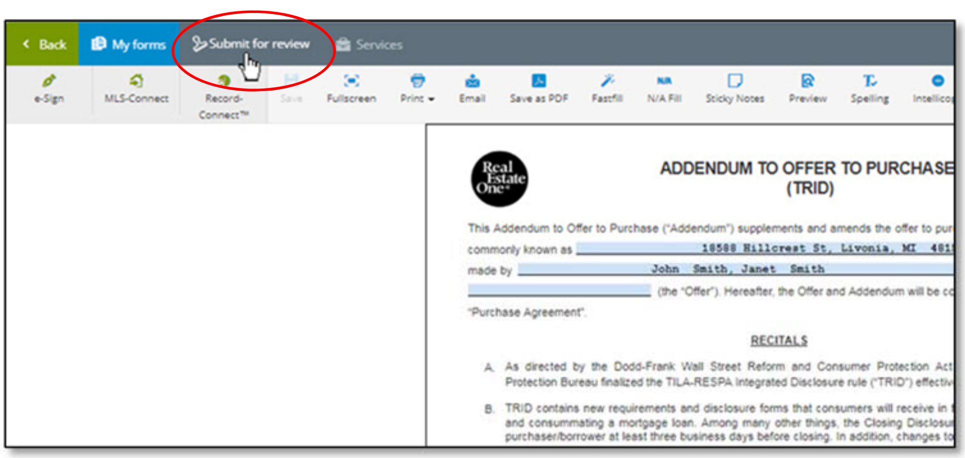
If it is determined that your transaction is missing something, you will receive a notification with the status of **Not Approved** with comments from your office administrator regarding what remains to be done to get the transaction approved.

If it is determined that your transaction has all of the required, fully executed documents, you will receive a notification that your transaction has been **Approved**.





If your transaction was not approved, fix the issue and submit the transaction or the individual document back through for review again.



Manage all contingencies and due dates.

Coordinate with Title Company, Seller and other Broker to proceed to closing.