

Add a Transaction to an Active Listing

When a listing goes under contract, you will need to update that listing to an Open/Pending status by adding a transaction to it.

You can add the transaction from the listing in dash, or via the Transaction module.

Fields marked with an asterisk (*) are mandatory.

To Add a Transaction from the Listing:

- Go to the dash homepage, or the Listings module homepage.
- At the bottom of the screen, locate the listing in the Browse Listing Grid.
- Click on the listing.












On Market Listings Set as default Filter

Export to Excel Export to PDF

MLS ID	LISTING ID	PROPERTY ADDRESS	OFFICE
	SZ3Y3N4ZL	234 McCurdy Rd , Florence	0001 - 419 S C
	MBZN8NB5C	333 Chippenham Lane , Florence	0001 - 419 S C

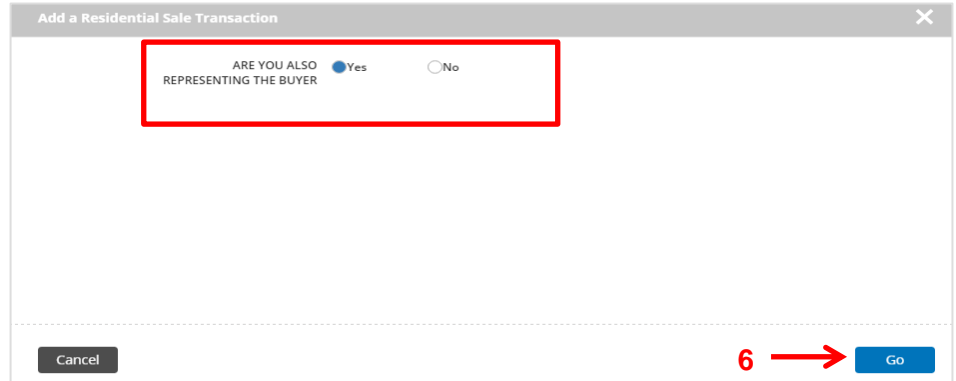
The Actions Overlay displays.

- Click **Add Transaction**.

 Quick Update	 Copy	 View Details	 Delete
 Update Details	 Media	 Open House	 Withdraw
 Print listing without Map & Media		 Print listing with Map & Media	
 Add Transaction		Created : Jan 24, 2018 by Angelia Stamatis	
		Last Update : Jan 24, 2018 by Angelia Stamatis	

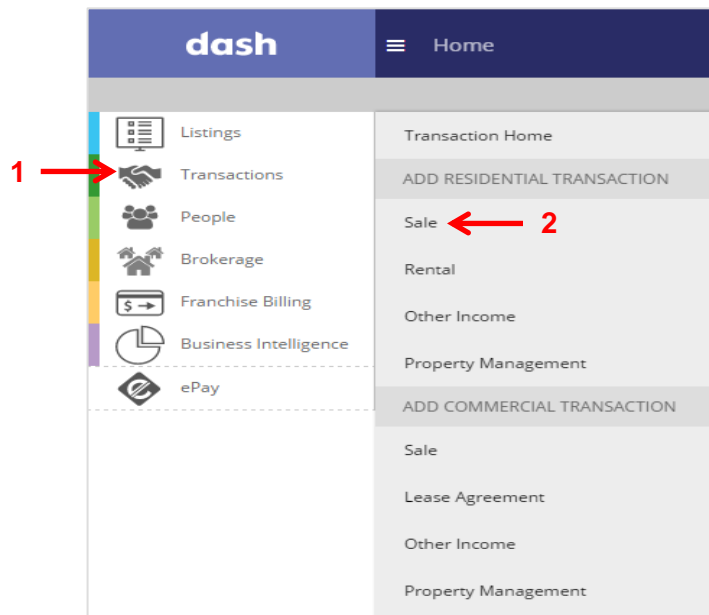
The **Add a Residential Sale Transaction** window displays.

5. Indicate if you are also representing the buyer.
6. Click **Go**.



To Add a Transaction from the Transactions Module:

1. Click **Transactions** on the left navigation menu.
2. Click **Sale** under Add Residential Transaction.

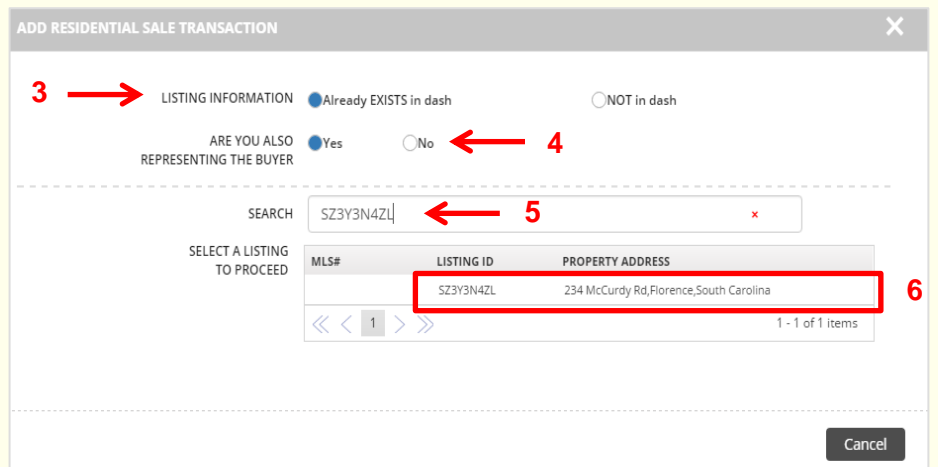


The **Add Residential Sale Transaction** window displays.

3. Check off **Already Exists in dash**.
4. Indicate **“Yes”** if you are also representing the buyer.

Note: If an outside company represents the buyer side, select **“No”** for Are You Also Representing the Buyer.

5. Search for the listing.
6. Click on the search result.



If You Represent Only the Seller:

The **Add a Residential Sale Transaction** screen displays.

Listing & Terms Tab

Listing Side

FORECLOSURE SHORT SALE NEW CONSTRUCTION

MARKET STATUS * **ON MARKET**

7 LISTING OFFICE * 0001 - 1 campus drive, Schenectady

LIST PRICE * 300,000 USD

LIST SIDE GROSS COMMISSION 4,800 USD

OR % OF SALE PRICE 1.60

LIST DATE * 01/31/2017

COUNTRY * United States

ADDRESS LINE 1 * 803 Country Club Drive

ADDRESS LINE 2

CITY * Teaneck

STATE/ PROVINCE * New Jersey

ZIP/POSTAL CODE * 07666

Buyer Side

BROKER REF#

OUTSIDE BROKER BRAND Other

OUTSIDE BROKER OFFICE * Legacy Properties

8 SALE PRICE * 300,000 USD

BUYER SIDE GROSS COMMISSION 4,800 USD

OR % OF SALE PRICE 1.60

TERMS

CONTRACT DATE * 06/22/2018

ESTIMATED CLOSE DATE * 08/22/2018

9 CLOSE DATE mm/dd/yyyy

10 Internal Notes

CONTINGENCIES

11 Appraisal Financing Inspection

Lead Paint Test Mold Inspection Other

Radon Test Sale of Current Home Sewer Inspection

TOTAL % ASSIGNED 100

SALES ASSOCIATES * **Note: 2 sales associates working together on listing side**

NAME	% OF SIDE	PRIMARY
10391 - Sundra Brooks	60	<input checked="" type="radio"/>
11008 - Angelia Stamatis	40	<input type="radio"/>

SALES AGENT - OUTSIDE BROKER OFFICE

FIRST NAME LAST NAME EMAIL

Cancel **12** → Commission & Deductions >>

The Listing Side information has been prefilled based on the listing information entered previously.

7. Enter the correct **List Side Gross Commission**. This is the amount of gross commission for the list side only.
8. Enter the information for the **Buyer Side**. Outside Broker Office and Sale Price are required.
9. Enter the **Contract Date** and **Estimated Close Date**. **Note: Do not enter the Close Date until after the transaction has closed.**
10. You can enter any **Internal Notes** or reminders about this transaction
11. Select any **Contingencies** for the transaction.

Note: There are 2 sale associates representing on the listing side with 60/40 commission splits

12. Click **Commission & Deductions** to move on.

Commission & Deductions Tab

Listing & Terms	Commission & Deductions	Seller	Buyer
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ADJUSTED GROSS COMMISSION

TRANSACTION	
TOTAL GROSS COMMISSION	\$9,600.00
OUTSIDE BROKER COMMISSION	\$4,800.00
REFERRALS	<input type="button" value="Enter Info"/> 0 Referrals 13
REPORTED REFERRALS	\$0.00
ADJUSTED GROSS COMMISSION	\$4,800.00

Adjusted Gross Commission(AGC)= Gross Commission - Outside Broker Commission- Reported Referrals

SALES ASSOCIATE AGC

LISTING SIDE	SALES ASSOCIATE %	LISTING SIDE AGC
10391 - Sundra Brooks	60%	\$2,880.00
11008 - Angella Stamatis	40%	\$1,920.00

DEDUCTIONS

SA COMMISSION	TRANSACTION (\$)	LISTING SIDE (\$)
LISTING SIDE		
10391 - Sundra Brooks		<input type="text" value="1,800"/> 14
11008 - Angella Stamatis		<input type="text" value="1,200"/> 14
TOTAL SA COMMISSION	<input type="text" value="3,000.00"/>	<input type="text" value="3,000.00"/>

DEDUCTIONS	TYPE	DEDUCTION	SIDE	AMOUNT
15 →	-- SELECT --	<input type="text"/>	-- SELECT --	<input type="text"/>

16 →

The Total Gross Commission carries over from what has been entered on the Listing & Terms tab.

- 13. Add any referrals by clicking **Enter Info** and entering the information on the screen.
- 14. Enter the **Sales Associate Commission**.
(This is the amount that the sale associate receives, out of the total AGC). You can enter each sales associate commission per transaction side represented.
- 15. Enter any additional **Deductions** (off the bottom or off the top) that would affect company dollar but not the adjusted gross commission.
- 16. Click **Seller** to move on.

Seller Tab

Listing & Terms ✓ Commission & Deductions ✓ **Seller** Buyer Review

SELLER SOURCE* -- SELECT --

SELLER LEAD* Agent Office

SELLER DETAILS

TYPE* Developer

FIRST NAME -- SELECT -- Select from existing contacts ← 17

LAST NAME

ENTITY NAME* M & E Builders

CURRENT ADDRESS

Property Address ← 18

COUNTRY -- SELECT --

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE/ PROVINCE -- SELECT --

ZIP/POSTAL CODE

FUTURE ADDRESS

COUNTRY -- SELECT --

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE/ PROVINCE -- SELECT --

ZIP/POSTAL CODE

OTHER DETAILS

CURRENT PHONE NUMBER

FUTURE PHONE NUMBER

EMAIL

WEBSITE

Add Another Seller

Cancel 19 → Buyer >>

17. Enter the **Seller Details**. If the seller has been previously entered into dash, you can **Select from existing contacts**.

18. Enter the Seller's Current Address, Future Address and Other Details. You can check to use the **Property Address**.

19. Click **Buyer** to move on.

Buyer Tab

Listing & Terms ✓ | Commission & Deductions ✓ | Seller ✓ | **Buyer** | Review

BUYER SOURCE: -- SELECT --

BUYER LEAD: Agent Office

BUYER DETAILS

TYPE: -- SELECT --

FIRST NAME: -- SELECT -- Select from existing contacts

LAST NAME:

ENTITY NAME:

CURRENT ADDRESS

COUNTRY: -- SELECT --

ADDRESS LINE 1:

ADDRESS LINE 2:

CITY:

STATE/ PROVINCE: -- SELECT --

ZIP/POSTAL CODE:

FUTURE ADDRESS

Use property address

COUNTRY: -- SELECT --

ADDRESS LINE 1:

ADDRESS LINE 2:

CITY:

STATE/ PROVINCE: -- SELECT --

ZIP/POSTAL CODE:

OTHER DETAILS

CURRENT PHONE NUMBER:

FUTURE PHONE NUMBER:

EMAIL:

WEBSITE:

[Add Another Buyer](#)

[Cancel](#) 1 → [Review](#)

The Buyer tab is similar to the Seller tab.

- 20. Complete the information for the Buyer, if known.
- 21. Click **Review** to move on.

Review Tab

Listing & Terms ✓ | Commission & Deductions ✓ | Seller ✓ | Buyer ✓ | **Review ✓**

▶ Listing & Terms

▼ Commission & Deductions

COMMISSIONS		LISTING SIDE
GROSS COMMISSION		\$9,600.00
OUTSIDE BROKER COMMISSION		\$4,800.00
REPORTED REFERRALS		\$0.00
ADJUSTED GROSS COMMISSION		\$4,800.00

SALES ASSOCIATE AGC	SALES ASSOCIATE %	LISTING SIDE AGC
05060 - Mary Fuller	100%	\$4,800.00

DEDUCTIONS		LISTING SIDE
SA COMMISSION		\$0.00

▶ Seller

▶ Buyer

Cancel 3 → FINISH

The Review tab allows you to review the information entered prior to saving the transaction.

22. Edit any section by clicking the pencil.

23. Click **Finish** to save the transaction. The transaction will not be saved until you click on **Finish**.

ADD A RESIDENTIAL SALE TRANSACTION



Transaction has been saved

803 Coutry Club Drive, Teaneck, New Jersey, 07666, United States (TRANSACTION ID: Q33F5N-T5765)

MORE ACTIONS



Print this transaction record



Add Another Residential Sale Transaction



Go to Transactions Home Page



View this Transaction

A confirmation displays, letting you know that the transaction was saved successfully and assigned a Transaction ID

Also, you will see multiple options to select any action for your next step, as needed.

If You Represent Both the Seller and Buyer:

You would complete the information required for each tab, just as you would if you represent only the Seller.

Here are the key differences in the **Listing & Terms** and **Commission & Deductions** tabs if you represent both the seller and buyer.

Listing & Terms tab

You will be asked to enter additional information for the Buyer Side:

- Your company's Buying Office
- Sales Price
- Gross Commission
- Sales Associate name

Seller	Buyer	Review
BUYER SIDE		
BROKER REF# <input type="text"/>		
BUYING OFFICE * <input type="text" value="0001 - 1 campus drive, Schenectady"/>		
SALE PRICE * <input type="text"/> USD		
BUY SIDE GROSS COMMISSION <input type="text"/> USD		
OR % OF SALE PRICE <input type="text" value="3"/>		
TERMS		
CONTRACT DATE * <input type="text" value="mm/dd/yyyy"/> Internal Notes		
ESTIMATED CLOSE DATE * <input type="text" value="mm/dd/yyyy"/>		
CLOSE DATE <input type="text" value="mm/dd/yyyy"/>		
CONTINGENCIES <input type="checkbox"/> Appraisal <input type="checkbox"/> Financing <input type="checkbox"/> Inspection <input type="checkbox"/> Lead Paint Test <input type="checkbox"/> Mold Inspection <input type="checkbox"/> Other <input type="checkbox"/> Radon Test <input type="checkbox"/> Sale of Current Home <input type="checkbox"/> Sewer Inspection		
TOTAL % ASSIGNED 0		
SALES ASSOCIATES *		
NAME <input type="text"/>	% OF SIDE <input type="text"/>	PRIMARY <input checked="" type="radio"/>
Commission & Deductions >>		

Commission & Deductions

This tab will now show commission information for the Buyer Side as well as the Listing Side.

You can also enter the following on the Buyer Side.

- Referrals (paid out)
- Sales Associate(s) Commissions
- Deductions (off the bottom or off the top)

ADJUSTED GROSS COMMISSION

	TRANSACTION	LISTING SIDE	BUYER SIDE
TOTAL GROSS COMMISSION	\$51,600.00	\$25,800.00	\$25,800.00
REFERRALS	<input type="button" value="Enter Info"/>	0 Referrals	
REPORTED REFERRALS	\$0.00	\$0.00	\$0.00
ADJUSTED GROSS COMMISSION	\$51,600.00	\$25,800.00	\$25,800.00

① Adjusted Gross Commission(AGC)= Gross Commission - Reported Referrals

SALES ASSOCIATE AGC

	SALES ASSOCIATE %	LISTING SIDE AGC	BUYING SIDE AGC
LISTING SIDE			
10537 - Bethany Auclair	100%	\$25,800.00	
BUYER SIDE			
10597 - James Cadillo	50%		\$12,900.00
10127 - Joe Bradley	50%		\$12,900.00

DEDUCTIONS

SA COMMISSION	TRANSACTION (\$)	LISTING SIDE (\$)	BUYER SIDE (\$)
LISTING SIDE			
10537 - Bethany Auclair		<input type="text" value="0"/>	
BUYER SIDE			
10597 - James Cadillo			<input type="text" value="0"/>
10127 - Joe Bradley			<input type="text" value="0"/>
TOTAL SA COMMISSION	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

DEDUCTIONS	TYPE	DEDUCTION	SIDE	AMOUNT
<input type="button" value="ADD"/>	--SELECT--	<input type="text"/>	--SELECT--	<input type="text"/>