# Opt IN Transaction Coordination Duties

## New Listings

**Broker Mint automatically uploads new Active listings from the MLS every 2 hours**

- Assign the new Listing to the correct agent.
- Update the file completely
  - Fix any formatting issues from MLS feed
  - Add applicable checklists & contacts
  - Apply correct commission plan
  - Upload the MLS Listing to file

## Phase I – 24 hours

- Intro call/email to Agent to discuss the new transaction and to find out any pertaining info:
  - Escrow Contact
  - Title Contact
  - Lender Contact
  - If Home Warranty, HW Contact
  - Commission Split, Buyer/Seller Gift, Referral
  - HOA Contact (if applicable)
  - Does this deal have a co-agent split?
  - Does this deal have any concessions?
  - What is your source?
  - Is this a Lead Generation?
  - Is this an Agent Machine lead?
- Welcome Email to all contacts on transaction.
  - Introduction and information included.
- Upload all documents into Broker Mint and update file.
- Approve/Reject all documents uploaded & notify Agents.

## Phase II – 48 hours

- Verify Earnest Money has been deposited and receipt is uploaded into Broker Mint.
- Notify Agent of any outstanding documents or issues to work on.
- Home Warranty order if agent has requested Transaction Coordinator to do so.

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### Phase III – 2 weeks after acceptance

- Send a status update email making sure we're on track and if there's anything needed from us.
    - Make sure that 35R & Commission Disbursement are in the file.

### Phase IIV - 1 week before closing

- Verify that Septic is taken care of (22S).
- Verify items that were agreed upon on 35R were completed.
- If we are the Listing Agent and there is a Propane/Oil tank heat involved, email Agent to confirm this is taken care of.
- Send status update email to make sure we're on track to close and if there's anything needed from us.

### Phase V – Post Closing

- Verify that the Final Settlement Statement is in the file.
- Send client Thank You Letter if requested by Agent.