

Transaction Management Agent Tutorial



Weekly training for Agents:

20 minute webinar. Every Friday at 11am PST

Please use the following link to join the session: <https://join.me/bmsupport>

Streaming audio available through your computer.
Or you can call in to listen to the audio via your phone

Dial this number: +1.415.655.0381
Conference ID: 688-960-196

Overview

Brokermint system is a cloud based solution that helps to streamline the transaction management process. Once you received an invitation from your company you need to follow the link in the invitation email, setup your own profile and bookmark the login page:

<https://my.brokermint.com>

Please read the following information, it will give you a high-level overview of the transaction management system.

Transaction LifeCycle

Every transaction is a like a structured box that allows you to add multiple components to it: assign checklists, contacts, users, upload documents and submit them for review. The system automatically logs all actions and allows you to download a copy of your transaction archive at any time.

Let us walk you through all the steps:

1. Create a Transaction

Step 1: To create a new transaction, please click on the transactions link on the navigation panel and then press the Create Transaction button. In the popup window, select the transaction type, current status. Fill out all required fields and click on Next.

Step 2: While you are on Contacts page, you can assign existing contacts to your transaction or create new contacts. Simply start typing and the system will show all possible options.

If you don't see the contact you want to assign, enter first name, last name and role then click on Add. The system will give you a prompt to populate an email address and a phone number. Please click on the create button to add this contact to your database.

Hint: Contacts don't have access and don't receive any notifications. You can edit contact information, including address, mobile phone number, fax, etc. on the Contacts page (main menu).

Step 3: The final step allows you to enter commission information.

If you represent Listing side

The screenshot shows a form titled "AGENTS & COMMISSIONS" with a close button (X) in the top right corner. The form is divided into sections for "LISTING SIDE" and "BUYING SIDE".

- LISTING SIDE:** The current listing is "My Real Estate". There are four red boxes with arrows pointing to specific elements:
 - Box 1:** Points to the input field containing "6" for "OF PRICE SOLD".
 - Box 2:** Points to the input field containing "3" for "OF PRICE SOLD" under the "Award distribution" section.
 - Box 3:** Points to the link "My Real Estate" for the listing side.
 - Box 4:** Points to the link "Add agent / commission" for adding a new agent.
- BUYING SIDE:** The current buying side is "select". There is one red box with an arrow pointing to the input field containing "3" for "OF PRICE SOLD" under the "Award distribution" section.

At the bottom of the form, there is a "step 3 of 3" indicator, a "Back" button, and a "Create" button.

1. Enter Gross commission,
2. Enter split between Listing and Buying side
3. Assign your company to the Listing side
4. Add yourself to the Listing side.

Hint: If there are multiple agents on the same side click on the "Add agent / commission" link (#4 on the picture) and select the "Add agent" option. Split award allocation and make sure

that the total across all Listing side agents is equal to 100%.

If you represent Buying side

The screenshot shows a form titled "AGENTS & COMMISSIONS" with a close button (X) in the top right. The form is divided into sections for Listing Side and Buying Side. At the top, there is a "Total gross commission" field with a value of 3 and a percentage dropdown set to % OF PRICE SOLD. Below this is the "LISTING SIDE" section with a "select" dropdown and an "Award distribution" field set to 0 % OF PRICE SOLD. The "BUYING SIDE" section is set to "My Real Estate" and includes an "Add agent / commission" link. Below this, there are two more fields: "Award distribution" set to 3 % OF PRICE SOLD and "Award allocation to Andrew McDemo" set to 100 % OF SHARED GROSS INCOME. At the bottom, there is a "step 3 of 3" indicator, a "Back" button, and a "Create" button. Red arrows and boxes highlight three key steps: 1. A red arrow points from the "3" in the "Total gross commission" field to the "3" in the "Award distribution" field. 2. A red box labeled "1" is around the "3" in the "Award distribution" field. 3. A red box labeled "2" is around the "My Real Estate" text. 4. A red box labeled "3" is around the "Add agent / commission" link.

1. Enter Gross commission and Buying side commission. In this case they are the same. Keep listing side commission equal to 0.
2. Assign your company to the Buying side
3. Add yourself to the Buying side. Repeat the same step to add multiple agents to the same side. Adjust award allocation split between agents to be 100% total.

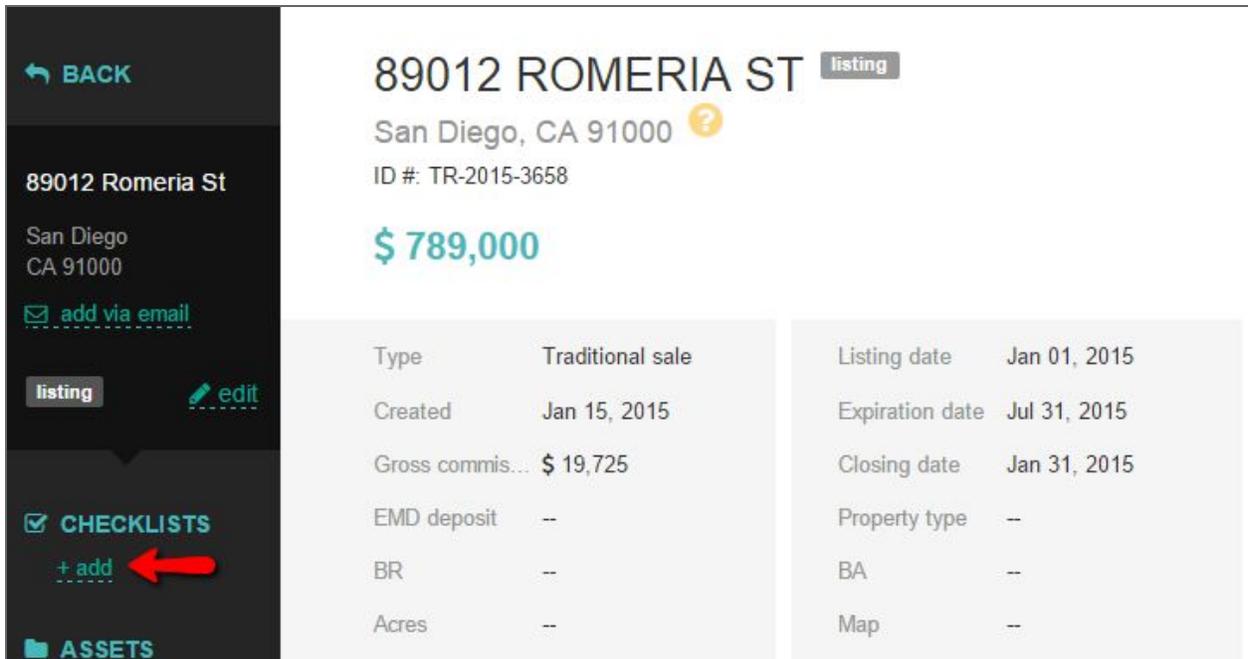
Hint: If there are multiple agents on the same side click on the “Add agent / commission” link (#3 on the picture) and select the “Add agent” option. Split award allocation and make sure that the total across all Buying side agents is equal to 100%.

Click on create once ready.

Let's move on and show you how you can add checklists and upload documents.

2. Assign a Checklist

To assign a checklist, you need to click on the add button and select a checklist template. Once assigned, you will see a list of tasks and documents you need to complete. If there are multiple checklists you want to assign, you can add additional checklists by repeating the process and clicking on the add button.



The screenshot shows a mobile application interface for a real estate listing. The listing is for 89012 Romeria St in San Diego, CA 91000, with an ID of TR-2015-3658 and a price of \$789,000. The listing is categorized as a 'Traditional sale' and was created on Jan 15, 2015. The gross commission is \$19,725. The listing date is Jan 01, 2015, and the expiration date is Jul 31, 2015. The closing date is Jan 31, 2015. The property type is not specified. The listing also includes a BR (Broker's Report) and a Map. The checklist section is highlighted with a red arrow pointing to the '+ add' button.

Type	Traditional sale	Listing date	Jan 01, 2015
Created	Jan 15, 2015	Expiration date	Jul 31, 2015
Gross commis...	\$ 19,725	Closing date	Jan 31, 2015
EMD deposit	--	Property type	--
BR	--	BA	--
Acres	--	Map	--

Let us show you how to complete tasks and upload documents

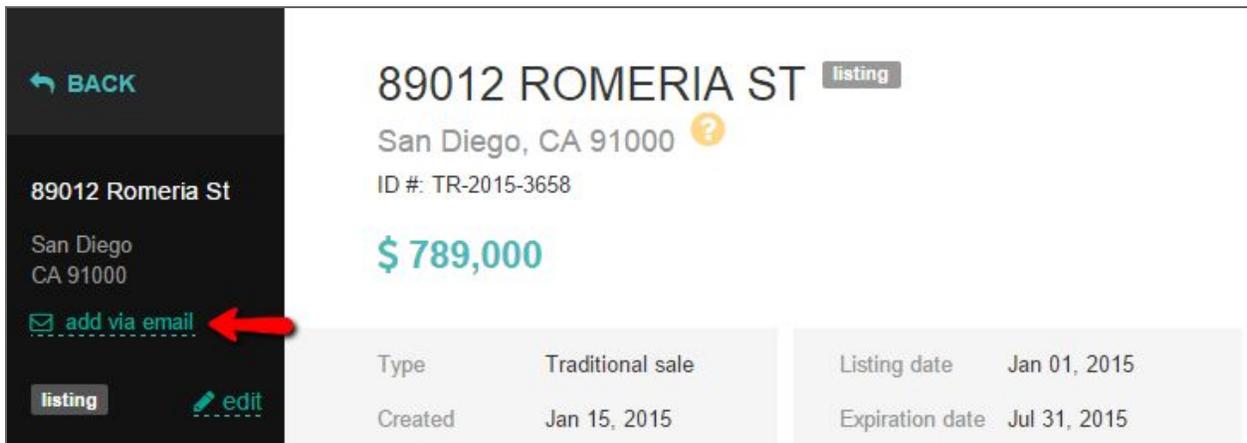
3. Upload Documents to Your Transaction

Your checklist may contain a few different items, there may be tasks and documents. Tasks guide you through the process and help to complete all needed steps. You can mark tasks as complete as soon as you took care of it.

On top of tasks, you need to upload documents to your transaction. Here are a few options of how you can add documents:

- **Option 1.** You can click on the Upload button, then select a document and add it to your task. Once uploaded, you will see the document preview.
- **Option 2.** Email documents to your transaction. Click on the “add via email” button to see the unique email address automatically generated by the system. Email your files to

this address and the system will save them to the unsorted folder for further processing. In few seconds, we will explain how you can manage them there.



The screenshot shows a real estate listing interface. On the left is a dark sidebar with a 'BACK' button, the address '89012 Romeria St', 'San Diego CA 91000', and a link 'add via email' with an envelope icon. A red arrow points to this link. Below the address are 'listing' and 'edit' buttons. The main content area displays '89012 ROMERIA ST' with a 'listing' tag, 'San Diego, CA 91000' with a question mark icon, and 'ID #: TR-2015-3658'. The price '\$ 789,000' is prominently displayed. Below this is a table with listing details:

Type	Traditional sale	Listing date	Jan 01, 2015
Created	Jan 15, 2015	Expiration date	Jul 31, 2015

- **Option 3.** Drag-n-drop documents to the system. Select multiple files and drag-n-drop them to any page within needed transaction. Once uploaded, you will be redirected to the unsorted folder for further processing.

4. Email Documents from the System

All the documents you uploaded to the system can be emailed out of it. Navigate to the documents list, select a document you want to email, add any additional documents you want to send, enter recipient(s), add a message, and hit send.

Hint: If the document you want to share remains in the unsorted folder, open the folder and follow the same steps.

You recipients will get an email with your message and a link to the documents. All outgoing emails are automatically logged in the Activity tab.

5. “Unsorted Documents” Folder

Let us explain how the unsorted folder works.

When you navigate to Documents > Unsorted, you can see all the documents you uploaded via the drag n drop option or emailed to your transaction.

Once uploaded, you can manage your files; for example, splitting or merging pdf documents, and then assigning them to your tasks.

Hint: The unsorted documents folder is your unlimited bucket that allows you to attach files to your transaction. If you have a pdf file, a set of pictures, a voice message, or any other piece of information you need to attach to your transaction, just upload it to this folder.

6. Split and Merge PDF files

To complete the transaction, you need to assign individual documents to your checklist items. If you have a PDF file with multiple documents in it, you need to split it up first and then assign. To split or merge files, navigate to the unsorted folder and select the file you want to manage, click on edit, and select either split or merge.

The split option gives you a preview of your document along with a set of fields to enter the series of pages that you want to be assigned to your checklist or saved as separate documents to Unsorted. Click on split once ready, and the system will generate new files.

The merge option allows you to select multiple files from your unsorted documents and combine them in one file; you can change the order and ultimately enter a name for your new document, which will be saved to the unsorted folder.

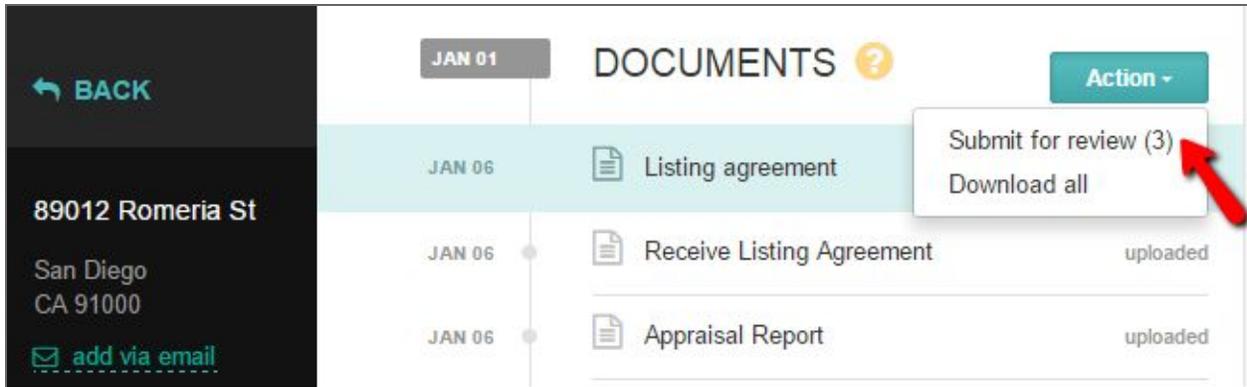
7. Assign a Document to a Task

Once you have all needed files in the unsorted folder, you can assign them to your checklist. Select a document you want to assign, and click on the “Assign to ..” button; you will see a list of documents from your checklist. Select a task and your document will be assigned to it. Once the document has been assigned, it will disappear from the unsorted documents list.

8. Submit Documents for Review

Once you uploaded a document and assigned it to your checklist, navigate to the Documents section. All documents will remain in the “uploaded” status until you submit them for approval. To submit all documents at once, you can click on the Action button and then select Submit Batch, which will submit all documents for approval.

To submit an individual document, select the document you want to send for review and click Submit. The system will send an email notification to the admin, asking to review the documents.



Hint: If there are documents on the list that are either optional or can't be provided, you can add your comments and mark them as exemption requests. Once you enter a comment, click on the Exempt button to mark the file as an exemption request.

9. Receive Offers

Navigate to Offers to start using this function and receive a unique URL to enter in your MLS data with instructions to "Submit all offers to this link."

Once connected to the site, the buyer's agent will submit the pertinent details and attach documents you've specified as necessary to the offer. When a new entry is complete, you and the buyer's agent will each receive an email verifying that the offer has been entered.

You, as the listing agent, will be able to see all offers together on one screen, sorted by offer price. This is a list you can share with your clients as you review each offer and compare it to the others.

You can add comments and assign different labels to your offers. This will help you to stay organized and store all information in one place.

Next, you'll be able to email the buyers' agents from within the system. Should you wish to ask some or all for a "highest and best" submission, you'll have convenience of writing one message, then choosing multiple recipients before you hit "send".

For your safety and for compliance, everything that's entered into the site will be stored, including submitted offers, attached documents, and the emails you send and receive.

Once an offer is accepted, you can move the property from listed to pending. From there, you can assign it a new checklist so you won't miss a detail or a deadline as you begin working on the tasks leading to closing.

10. Review Transaction Activity

The activity feed is a detailed time-stamped log of your transaction. No matter what you or your team members do, the system logs all actions. If someone deletes a document, you will be able to find a copy of it in the Activity log.

Hint: You can sort this list by event type and see all comments or all email messages.

11. Download Transaction Archive

To download your transaction archive, navigate to documents section, click on Action, and select Download All. The system will email you a link to download transaction archive.

Hint: The system will also save a copy of the Activity feed to the transaction archive. This guarantees that you can find any document you uploaded as well as a chronological list of actions completed within a given transaction.

12. Calendar

To see all tasks, documents, and milestones across all active transactions, navigate to the Calendar view (To-Do > Calendar).

By default, you will see the items across all transactions where you are set up as a transaction owner. You can toggle the view by applying different filters to it; you can see all milestones, all tasks and documents, or both

Hint: If you have access to transactions assigned to other users, you can see what they need to do or if you have access to all transactions, you can see what all of your users have to do by selecting the option "consolidated calendar".

Support

The Brokermint team is always available to assist with your questions. You can reach out to us 24/7 via online chat or email support@brokermint.com as well as you can give a call during business hours 8-6 PST Monday thru Friday at (619) 798-6369 x2

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