TransactionDESK®

FIVE EASY STEPS TO SEND YOUR COMPLETED TRANSACTION TO OUR ACCOUNTING DEPARTMENT.

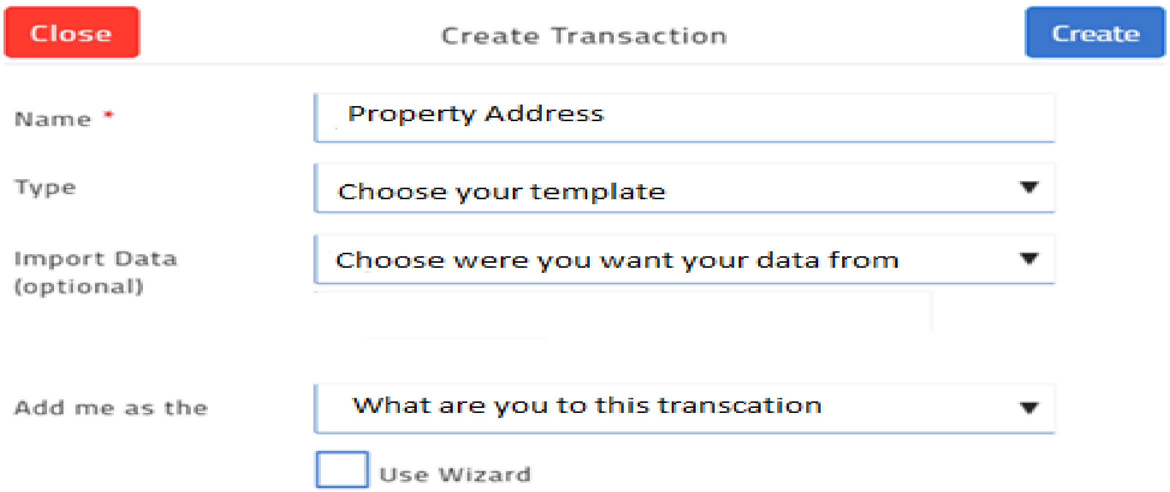
On the Details Tab, make sure to fill out these five blue fields once your transaction is complete and ready to be sent to accounting. These are the following:

PROPERTY TYPE ✦ PURCHASE PRICE ✦ OFFER DATE

CLOSING DATE ✦ CLASSIFICATION

Under your Checklist Tab, you should have all of the mandatory forms for accounting department including your Disbursement Authorization form (DA). Refer to www.URGFL.com for a complete list of mandatory forms.

HOW TO SEND YOUR FILES TO ACCOUNTING FROM TRANSACTION DESK.



*Remember to *Uncheck the Wizard**
You'll be directed to the Details Tab. All other tabs are on the right side of your screen.

DETAILS -Five Blue Fields are found here. **Property Type, Purchase Price, Offer Date, Closing Date and Classification**

CONTACT- Add all contacts to the transaction.

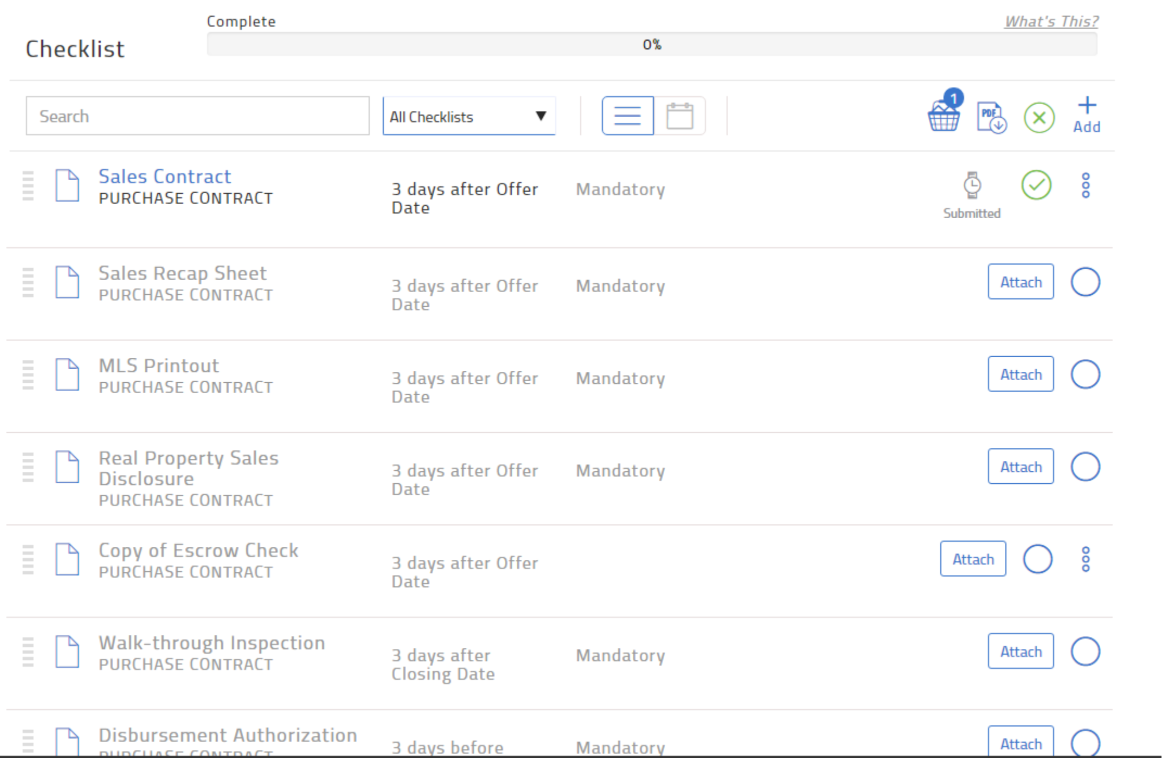
FORMS - All forms from the template are here

SIGNINGS -Where to send you documents to sign.

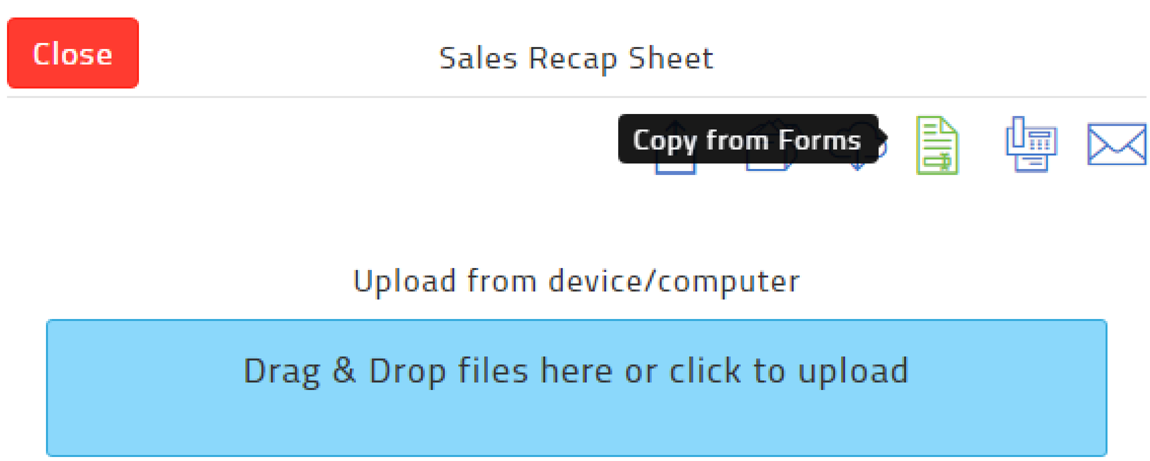
DOCUMENTS- Add any Uploads

CHECKLIST - *All documents, signed forms need to be inside the checklist. This is done by "attaching each individual form" to the related checklist. Once attached you'll see "Submitted" icon. Accounting has received this document. If you need to add* *any additional documents/forms to the checklist, simply click the plus sign.*

SAMPLE OF CHECKLIST

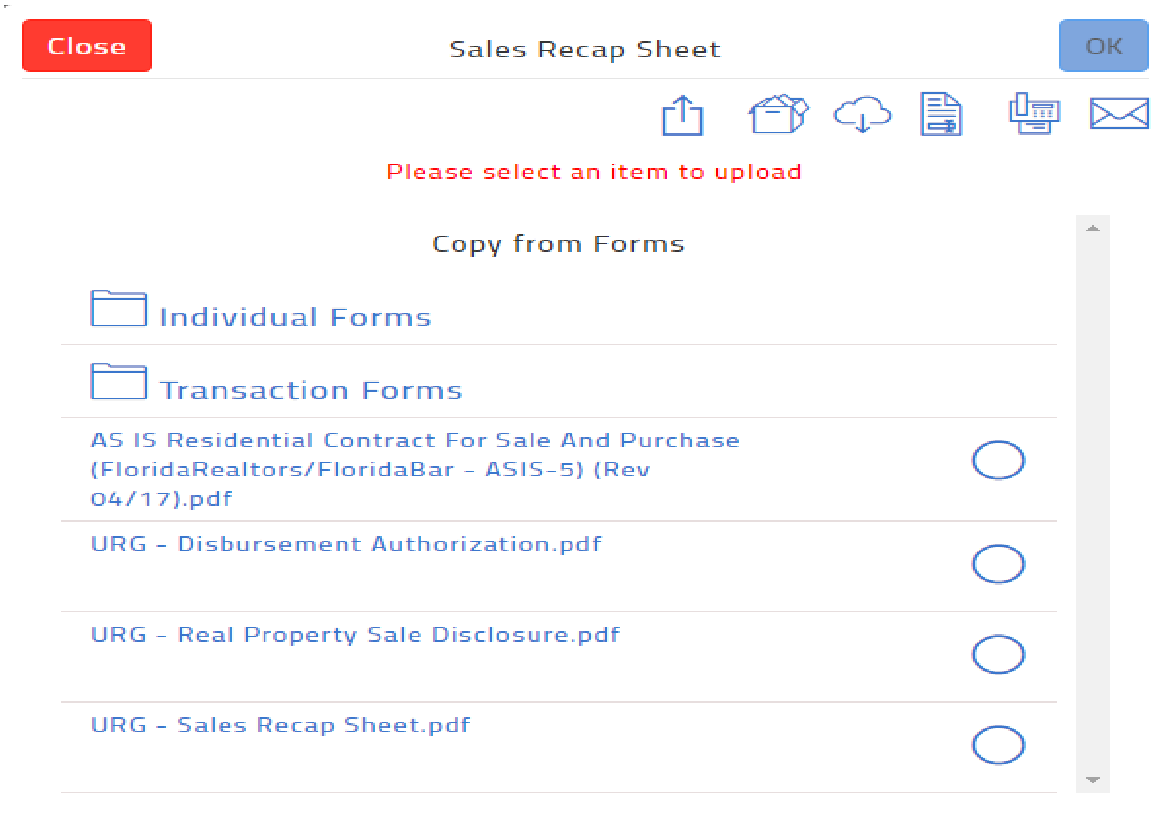


SAMPLE OF WHEN ATTACH IS SELECTED



- *Select Copy from forms*

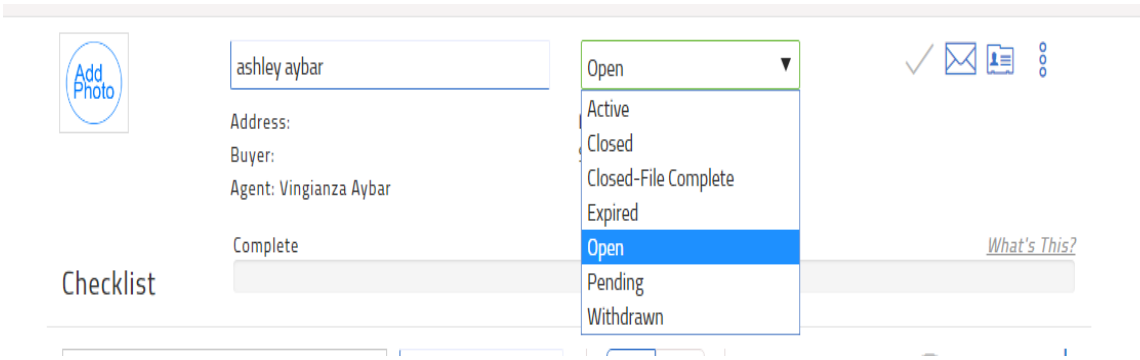
<u>SAMPLE OF WHEN COPY FROM FORMS IS SELECTED</u>



- *Select form that you wish to attach you will get a green check mark then press ok.*

*Once you have submitted all required documents under the Checklist Tab, mark your transaction **Pending** and accounting will review all documents for DA approval.*

SAMPLE OF WHERE TO CHANGE YOUR TRANSACTION TO PENDING AND CLOSED



- *On the top of your checklist you will see a tab that has the word Open on it select and a drop box will appear this is where you will change your transaction activate.*

*Once the transaction has closed, mark it **Closed.***

*Accounting will mark the transaction **Closed File-Complete** once file has funded.*

TRANSACTION DESK CHECK LIST ITEMS

RENTAL LISTING/LANDLORD

- RENTAL LEASE
- CONTRACT TO LEASE
- RENTAL RECAP SHEET
- TENANT APPLICATION
- ADDITIONAL ADDENDUM
- APPROVAL
- MLS PRINT OUT
- RENTAL DISBURSEMENT FORM
- WALK THROUGH INSPECTION
- OFFICE ONLY **

RENTAL LEASE/TENANT

- LISTING NOTICE
- LISTING AGREEMENT
- RENTAL RECAP SHEET
- CONTRACT TO LEASE
- TENANT APPLICATION
- RENTAL LEASE – TENANT
- MLS PRINT OUT
- APPROVAL
- RENTAL DISBURSEMENT FORM
- WALK THROUGH INSPECTION
- OFFICE ONLY**

PURCHASE CONTRACT/BUYER

- SALES CONTRACT
- SALES RECAP SHEET
- MLS PRINTOUT
- REAL PROPERTY SALES DISCLOSURE
- COPY OF ESCROW CHECK
- WALK-THROUGH INSPECTION
- DISBURSEMENT AUTHORIZATION
- AGENT COMMISSION- CHECK
- OFFICE ONLY**

LISTING SALE/ SELLER

- LISTING AGREEMENT
- LISTING NOTICE
- MLS PRINT OUT
- REAL PROPERTY SALES DISCLOSURE
- SALES RECAP SHEET
- SALES CONTRACT
- ADDITIONAL ADDENDUMS
- DISBURSEMENT AUTHORIZATRION
- AGENT COMMISSION CHECK- COPY
- OFFICE ONLY **

**** OFFICE ONLY – Accounting uploads the CD, copy of commission check. Agents do not need to add anything in this checklist.**