CENTURY 21 Affiliated

Darwin Manual
Revised 11.19.2019

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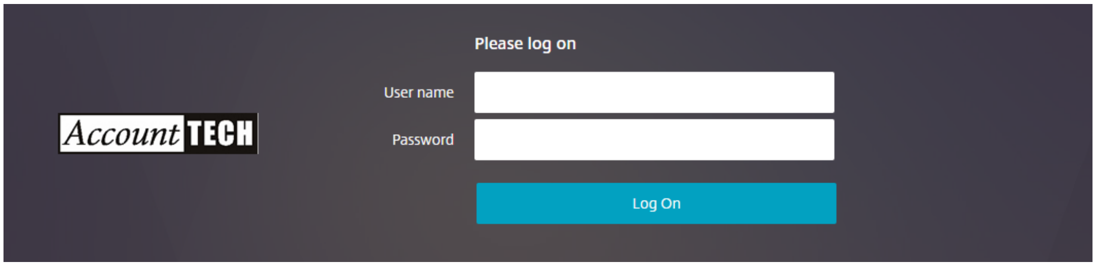
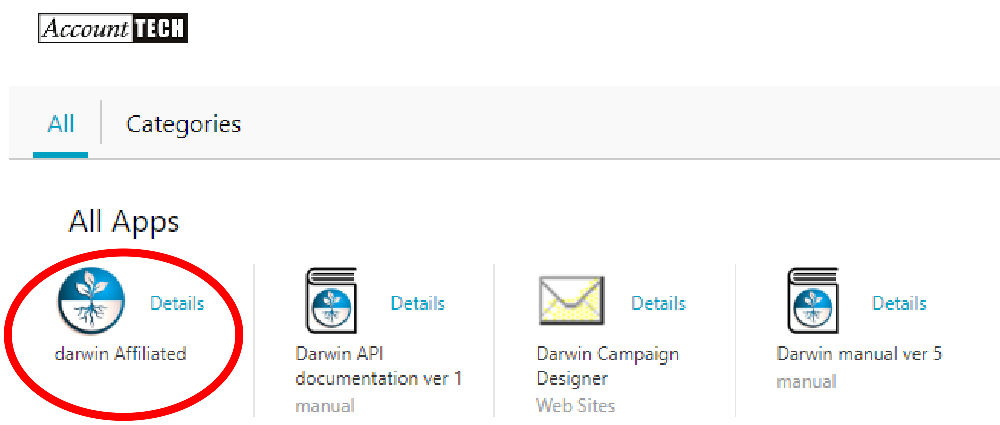
Accessing Darwin

First Login: Office Admins will log into the Citrix login from www.AccountTECH.com select Login, Darwin.
Password Reset Citrix: The Citrix password will be provided every 41 days from the IT Department.



Second Login**:** The Darwin login will be firstlast **one word*
Password: The Darwin password must include a ***Capital letter***, a ***Number*** & ***Symbol***. Office admin will be prompted every 41 days to reset the password.



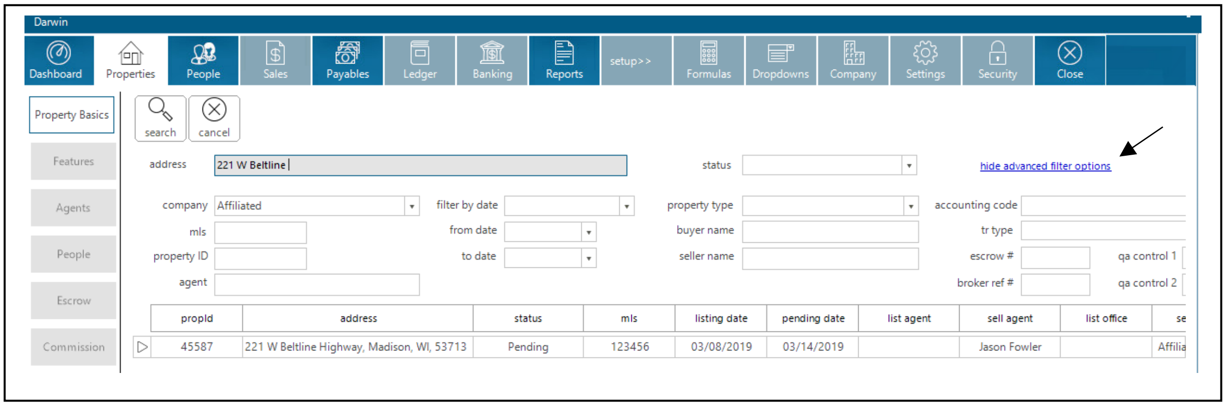
Issues Logging In? Contact helpdesk@c21affiliated.com to request access.

Listings

Affiliated agent active listings will pull from the MLS into Darwin.

Search Listing/Existing Property

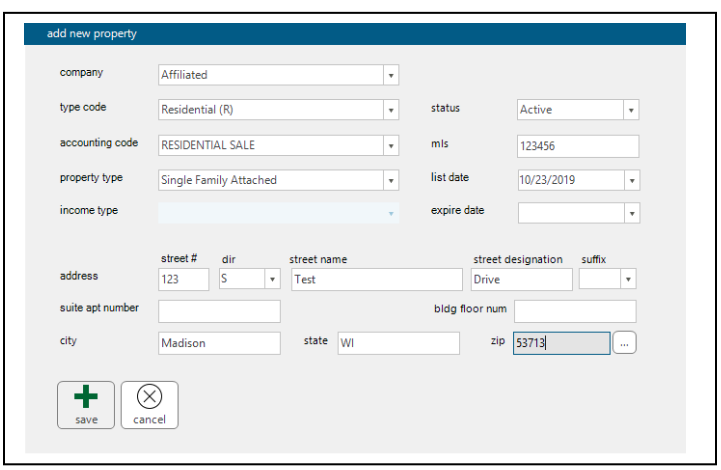
To search for listings, from the top corner of the page, select Search. First, search by MLS or agent. Use the Advanced filter option to filter your search.



Manual Entry (Buy Side)

Manual entry is required when Affiliated is representing the buyer. Rentals that do not have an MLS Number. When a listing is entered in the MLS and goes Pending immediately. If a property is active and is not showing in Darwin after several hours on the MLS, contact helpdesk@c21affiliated.com to resolve the issue.

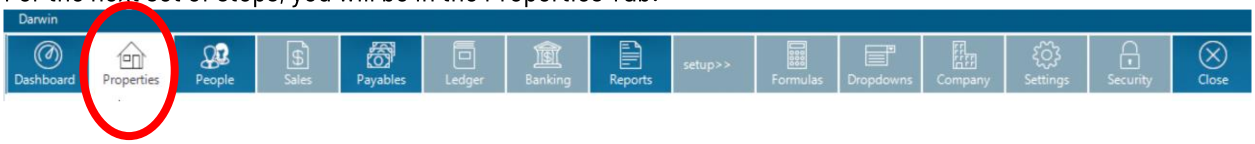
From the top left-hand corner of the page, select **PROPERTIES**. From the Property Basics tab, select **NEW**.



Add the new property by completing the **Company** Affiliated (default), **Type Code**, **Accounting Code**, **Property Type**, *Status*, Active (default) **MLS Number**, **List Date**, **Street Number**, **Street Name**, **Street Designation**, **Suffix**, **Suite/Apt Number**, **City**, **State**, **Zip Code**. Save.

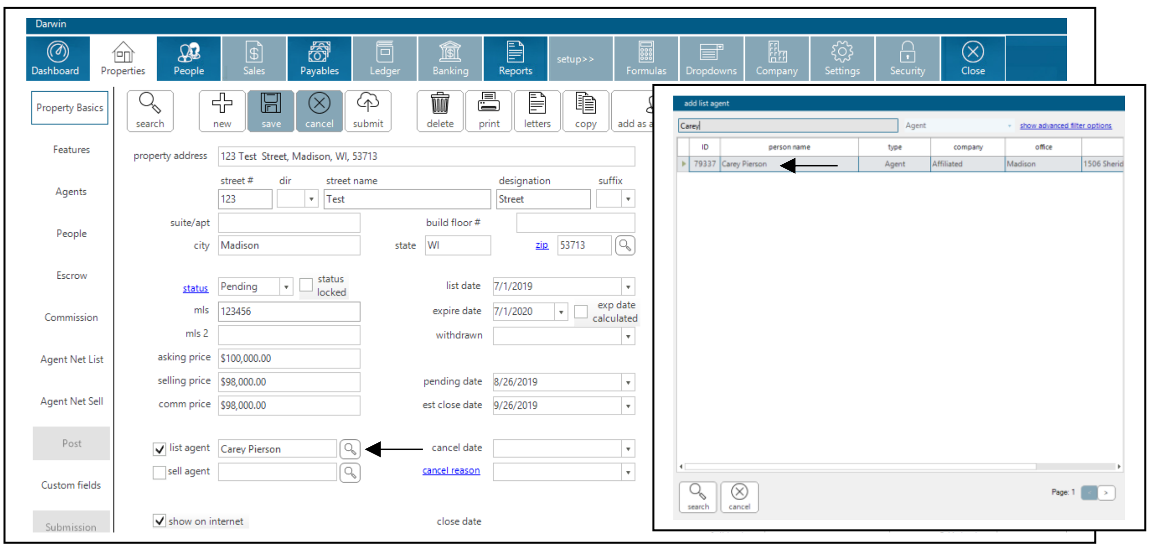
The Expire Date is not a Dash requirement. Enter if available on MLS print out or use the first of the current year.

For the next set of steps, you will be in the Properties Tab:



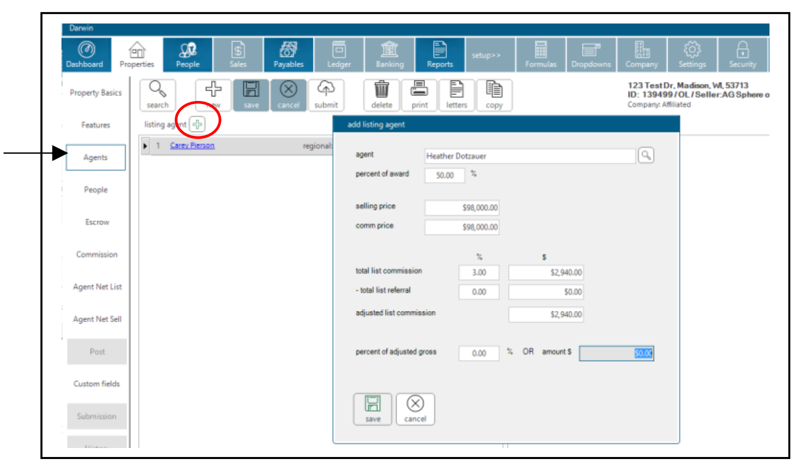
Adding List Agent

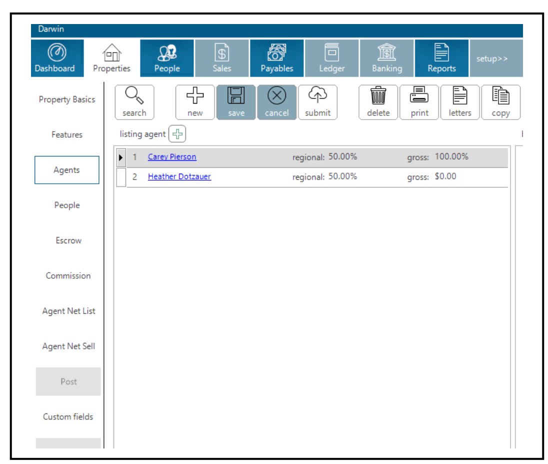
Under PROPERTIES. Select Property Basics. Select the magnifying glass icon to search for the **List Agent** *Double click to select the name. Save.



Adding Additional Agents

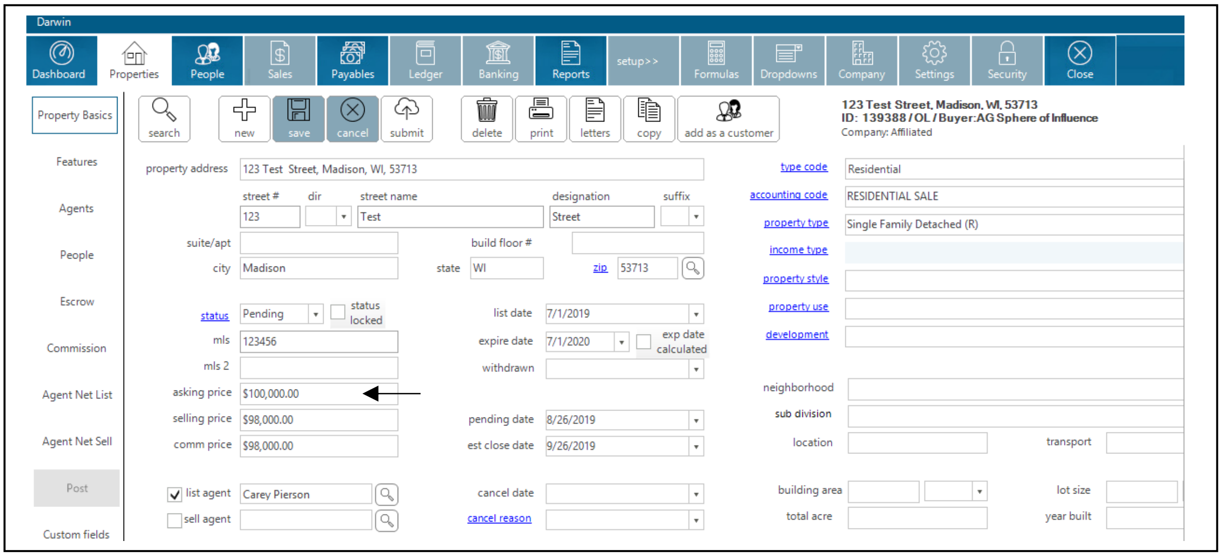
Under PROPERTIES. Select Agents. Select the green plus icon next to listing agent. Search for your additional agent. Enter the percent of award. Save.





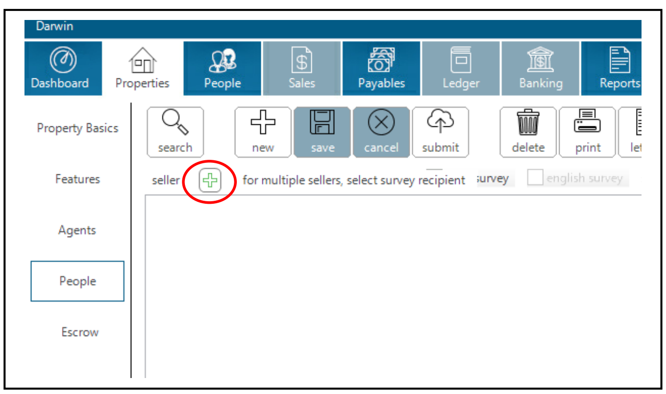
Adding List Price

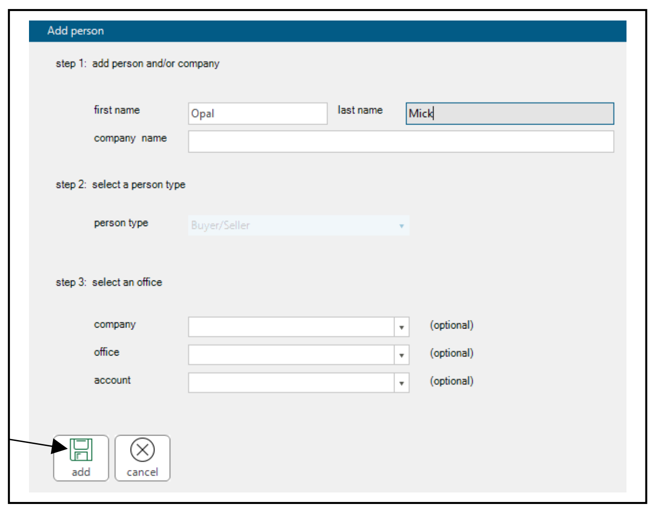
Under PROPERTIES. Select Property Basics. Enter the Asking Price. Save.



Adding a Seller

Under PROPERTIES. Select People. Select the green plus icon next to Seller. Enter the First Name, Last Name. Select Add.

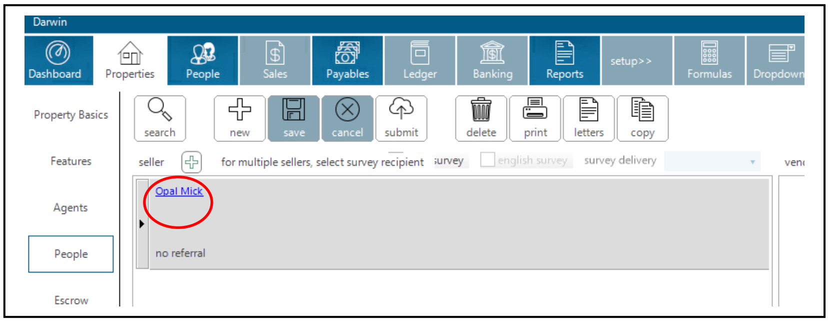




<u>Note: ALWAYS ADD NEW BUYER/SELLERS TO DARWIN. If you search to add an existing buyer/seller this will affect reporting.</u>

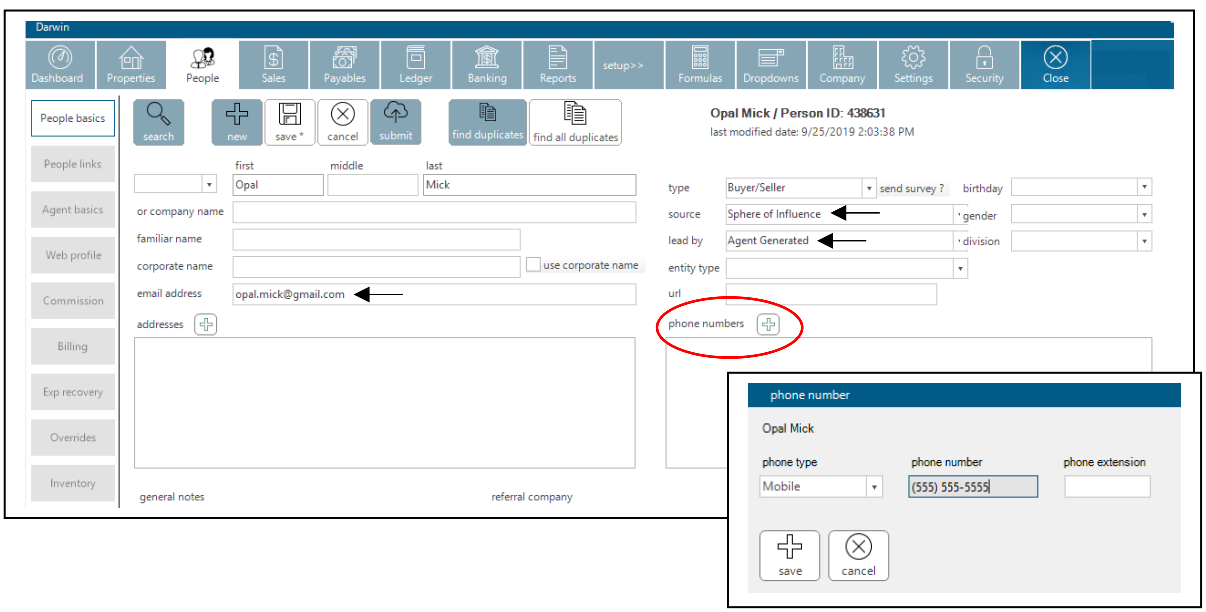
Edit Seller Information

Under PROPERTIES. Select People. Select the Seller's Name to open the profile.



This step will move you to the People Tab

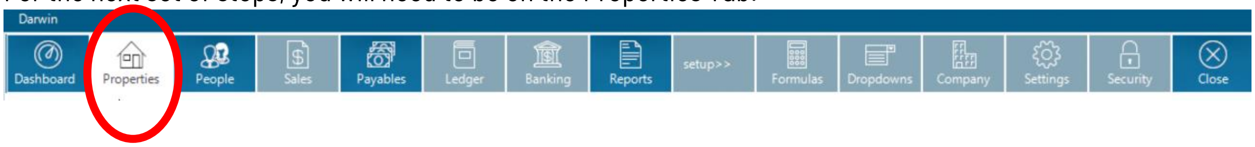
Under PEOPLE. Select People Basics. Enter the Seller/Buyer **email**. Once you enter an email address it will feed to Dash in real time for the survey to be send once the transaction is closed. Prior to closing, if the survey should not be sent, a helpdesk@c21affiliated.com ticket must be submitted. Select the **source**. If your agent's seller type came from a bank or business, you can change the type to *Financial Institution* or *Corporation* or what best applies. **Lead By** will always be *Agent Generated* unless it came from the Emily Matthews's team or Relocation. If the lead was provided by the Emily Matthews's team or Relocation you will select "*Office Generated.* Select the plus icon next to phone numbers to enter the Seller/Buyer **phone number** if provided in SkySlope. Repeat steps to add multiple sellers.



Pending

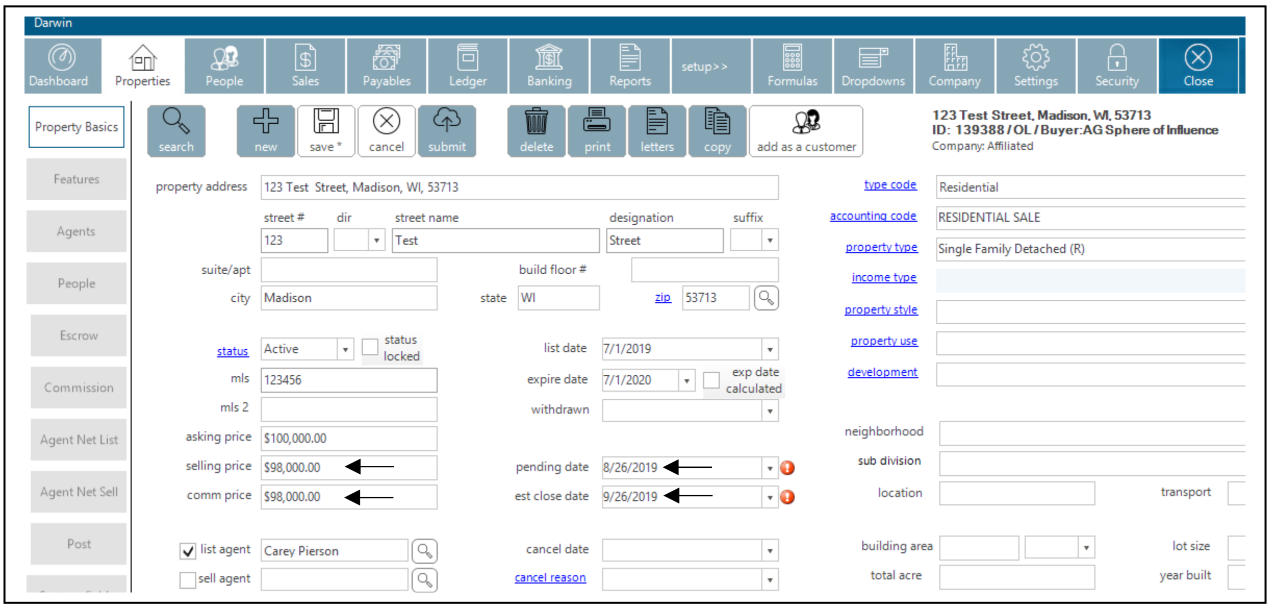
When your agent has an accepted offer, the information will need to be updated in Darwin.

For the next set of steps, you will need to be on the Properties Tab:

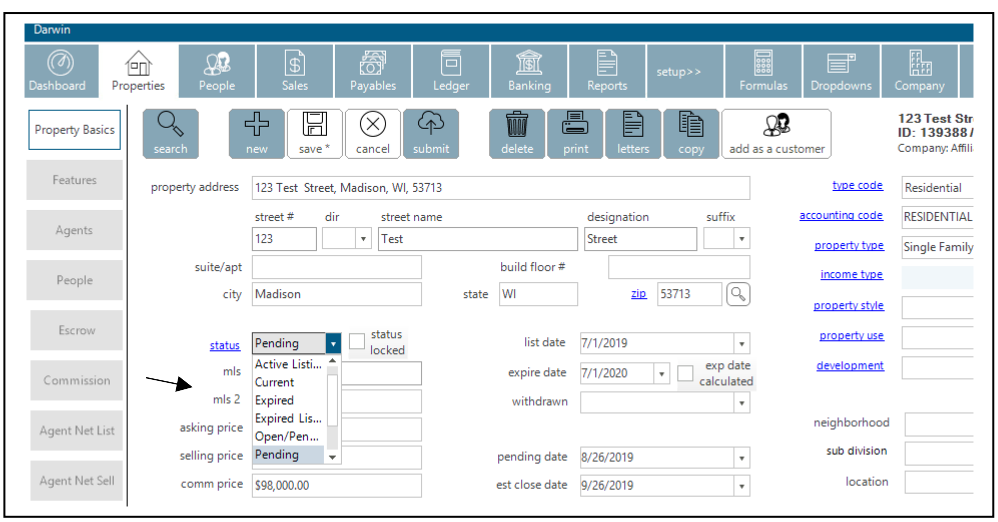


Updating Property Status

Under PROPERTIES. Select Property Basics. Add **Selling Price**, add **Commission Price** (auto default from selling price) Add **Pending Date (Accepted Offer)** Add **Estimated Close Date**. Save.

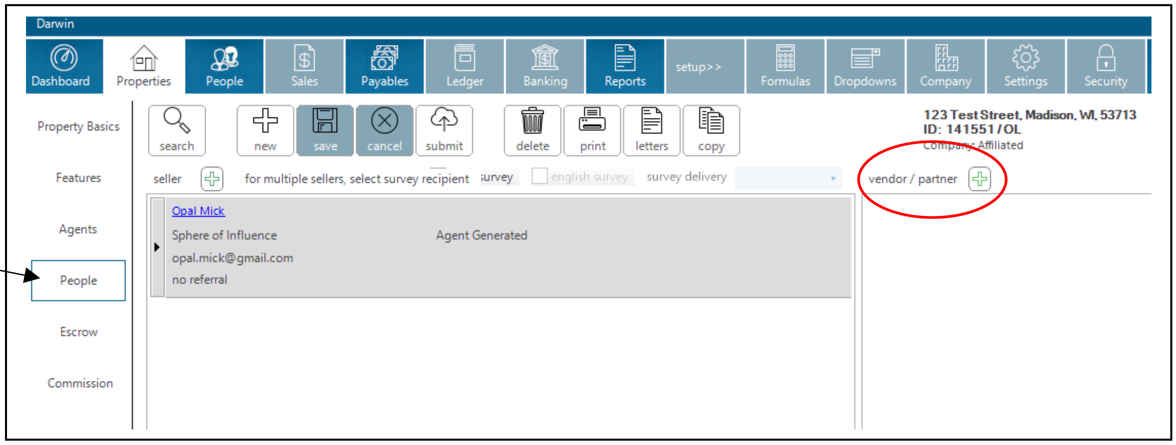


IMPORTANT: Verify the **Status** changed to Pending.

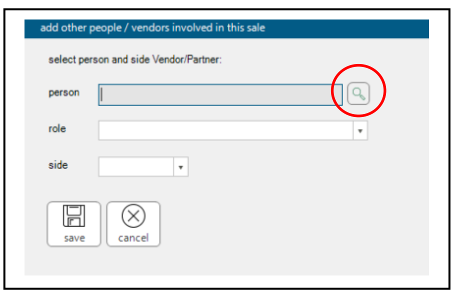


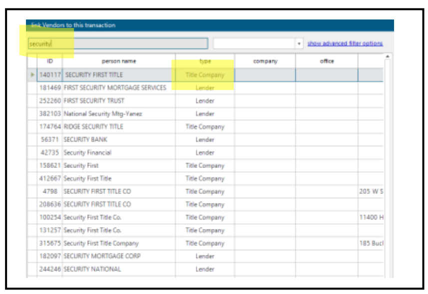
Adding Financing

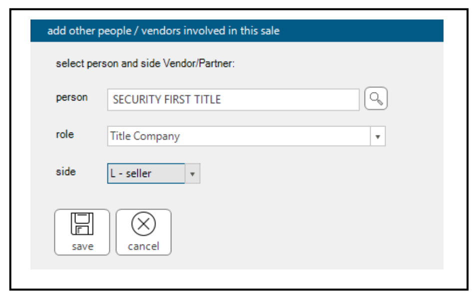
Under PROPERTIES. Select People. Select the plus icon next to **Vendor/Partner**.



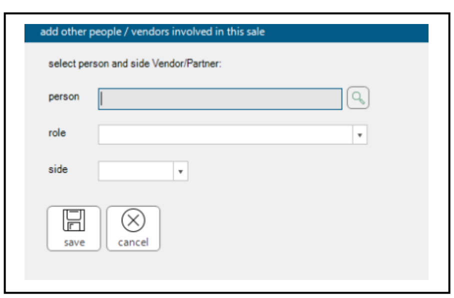
Adding Title Company**:** Select the magnifying glass icon to search for **Person.** Search for the company; verify type is Title Company, double click to select. The **Role** will default to Title Company. Select the side your agent is representing. Save.

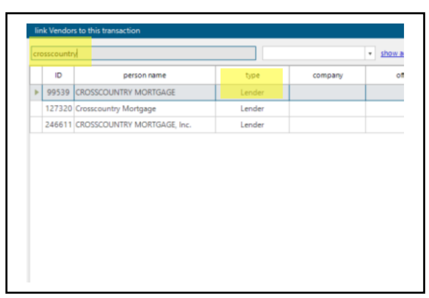


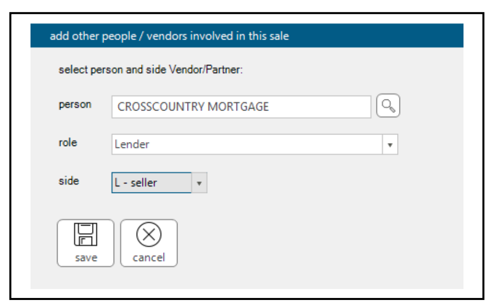




Adding Lender: Select the magnifying glass icon to search for **Person.** Search for the company; verify type is Lender, double click to select. The **Role** will default to Lender. Select Buyer. Save.





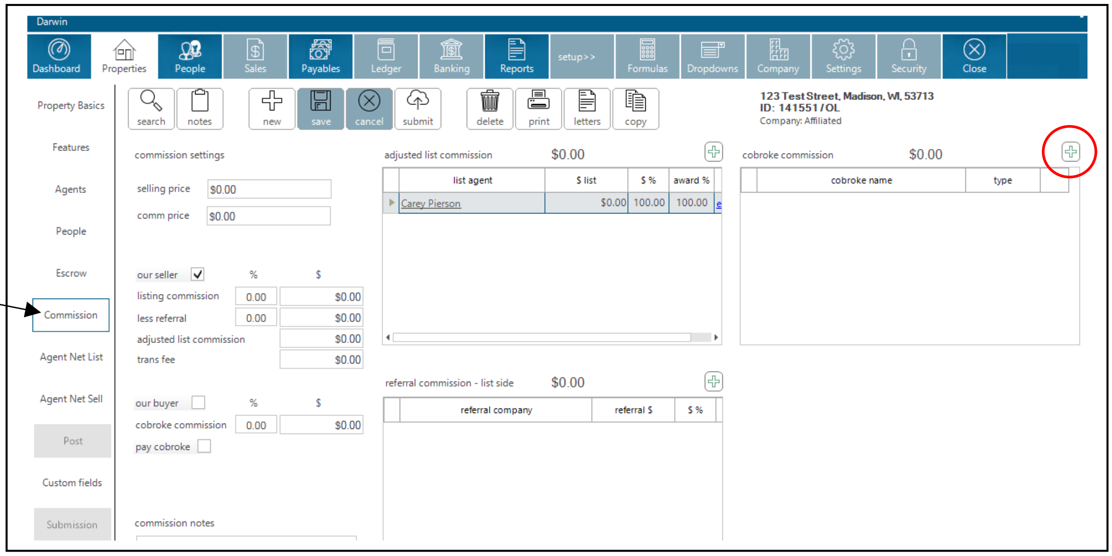


HINT: If you have a Cash deal, you will enter this as a Lender.

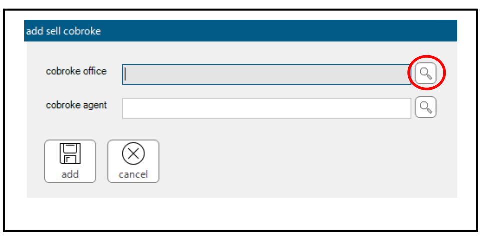
If you do not see Title or Lender please submit a Request Form to have added to Darwin. CLICK HERE.

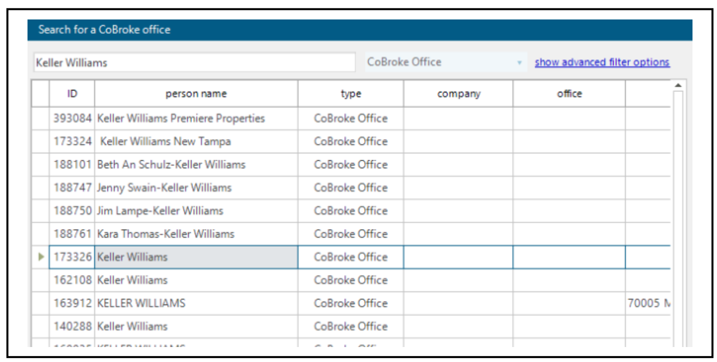
Adding Co-Broke

Under PROPERTIES. Select Commission. Select the green plus icon to enter the **Co-Broke**



Select the magnifying glass icon in co-broke office to search for the co-broke office. Select the co-broke by office address. If you do not have the address submit a request form. **Do not enter the Co-broke Agent name.**





If you do not see Co-Broke office with address, please submit a Request Form to have added to Darwin. [CLICK HERE](#).

Adding Commission Percent

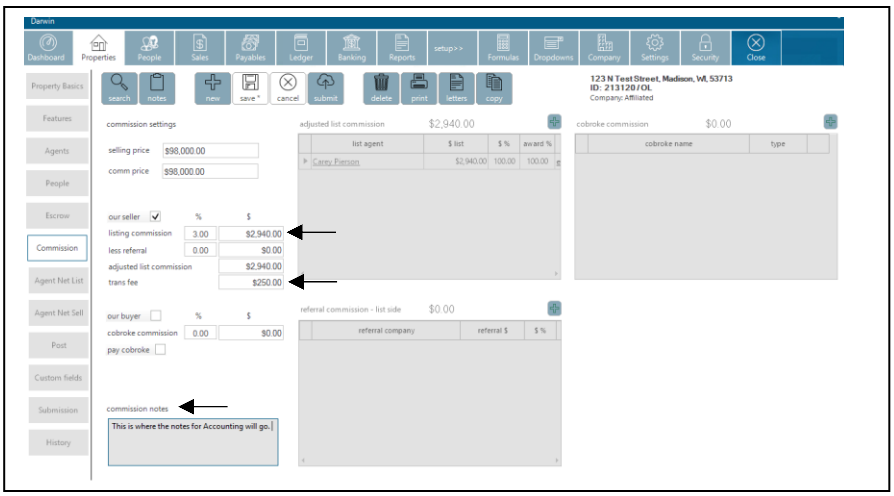
Under PROPERTIES. Select Commission. Under Listing Commission enter the percent of sale the agent is expected to receive. **If you have exhausted all options and your balance due does not match the commission check you can Flat Rate the transaction. When this option is used, detailed notes need to commission notes **

Adding Transaction Fee

Under PROPERTIES. Select Commission. Enter amount of transaction fee. If you have multiple fees, add them together for the total. Leave detailed notes under commission notes.

Adding Commission Notes

Notes for the Accounting Team would go in this section. Notes created in this section need to be specific to whatever side of the deal your agent is representing. Save.



Verify Listing Deposit Total

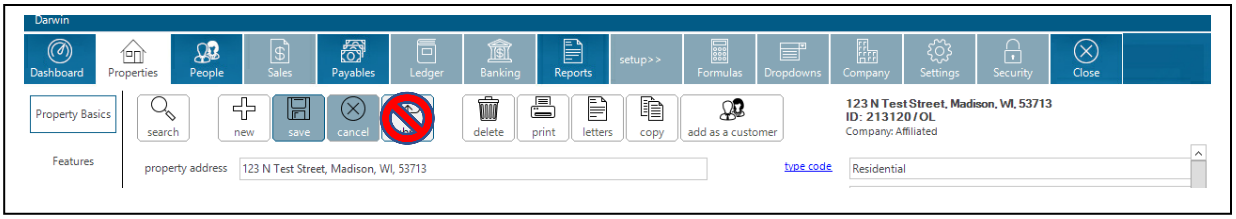
To do the math manually, take the Listing Commission Price, add the Transaction Fee (if applicable) subtract the escrow deposit. This should match the commission check. *you must move from commission to escrow to view the escrow deposit.

Verify Buyer Deposit Total

To do the math manually, take the Listing Commission Price, add the Transaction Fee (if applicable). This should match the commission check.

Submit in Darwin

Do not use. This is for Accounting purposes only.

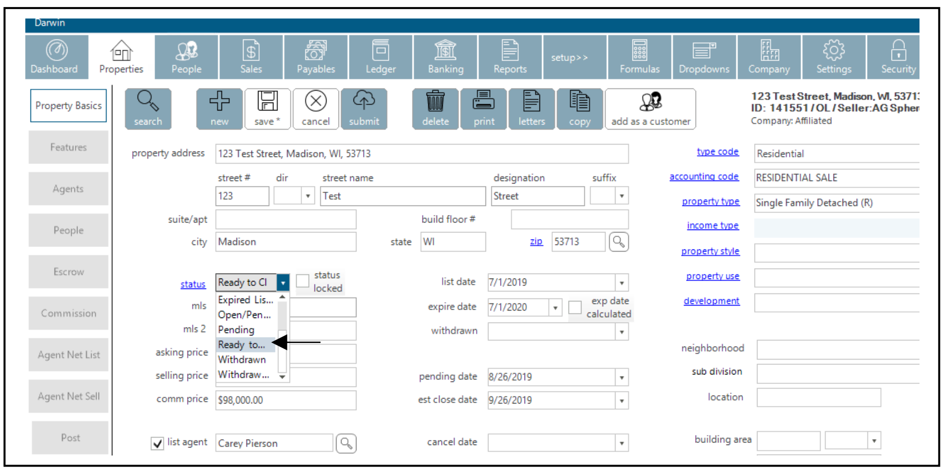


Closing

Once you've receive the commission check & closing disclosure, review/update all required fields in Darwin from the closing disclosure. Transaction status must mirror the status in SkySlope.

Ready to Close

Under PROPERTIES. Select Property Basics. Change the Status to **Ready to Close**.



Closing Schedule

Transactions that are in Ready to Close status in both Darwin & SkySlope before noon on Mondays & Wednesdays will be processed by Affiliated Accounting. Commissions are paid to agents on Wednesday & Friday.

Ready to Close Monday = Agent paid on Wednesday
Ready to Close Wednesday = Agent paid on Friday

Questions

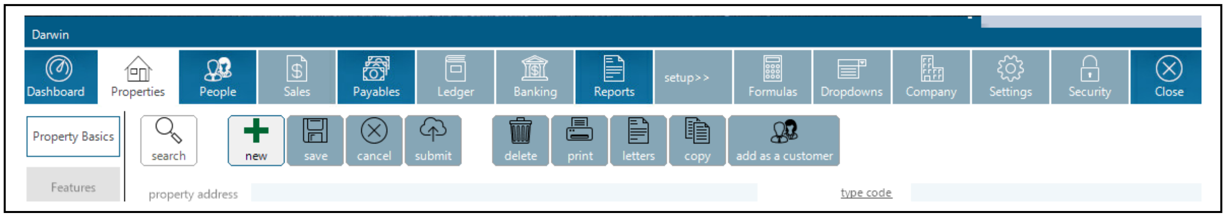
Accounting questions and concerns regarding specific transactions can be communicated to designated Accounting Point Person.

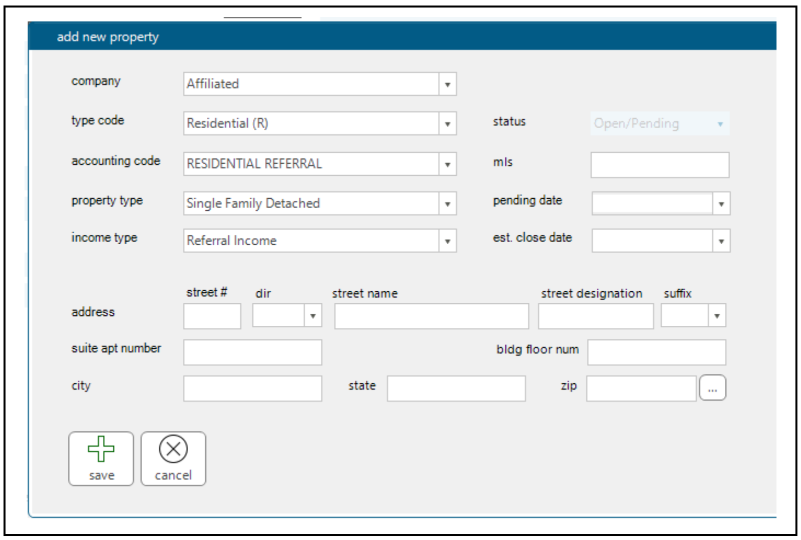
Referral From Co-Broke Commission

The referral is being paid to an Affiliated agent. General questions and concerns can be communicated to helpdesk@c21affiliated.com

Add Referral Listing

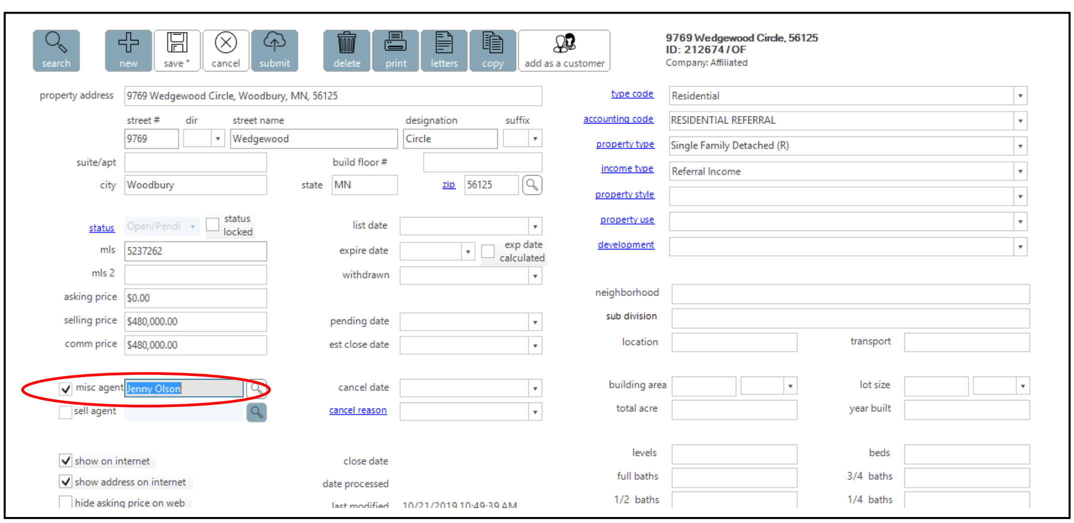
Under PROPERTIES. Select Property Basics. Select New.



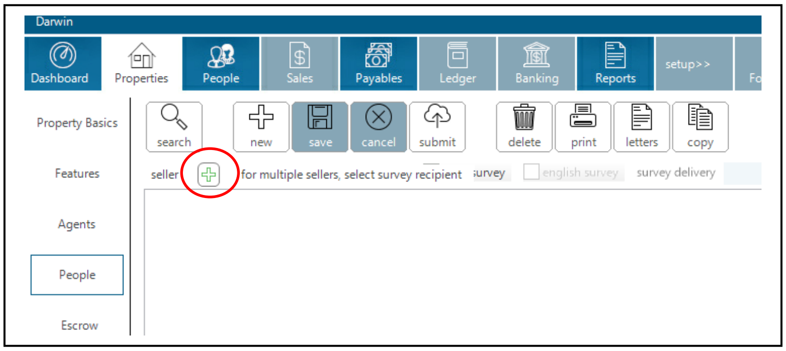


Select the **Type Code** as Residential (R). Select the **Accounting Code** as *Residential Referral*. Select the **Property Type** accordingly. Select the **Income Type** as *Referral Income*. You might not always have the MLS number. If not, enter the property address. Enter the **address, city, state & Zip. Save.**

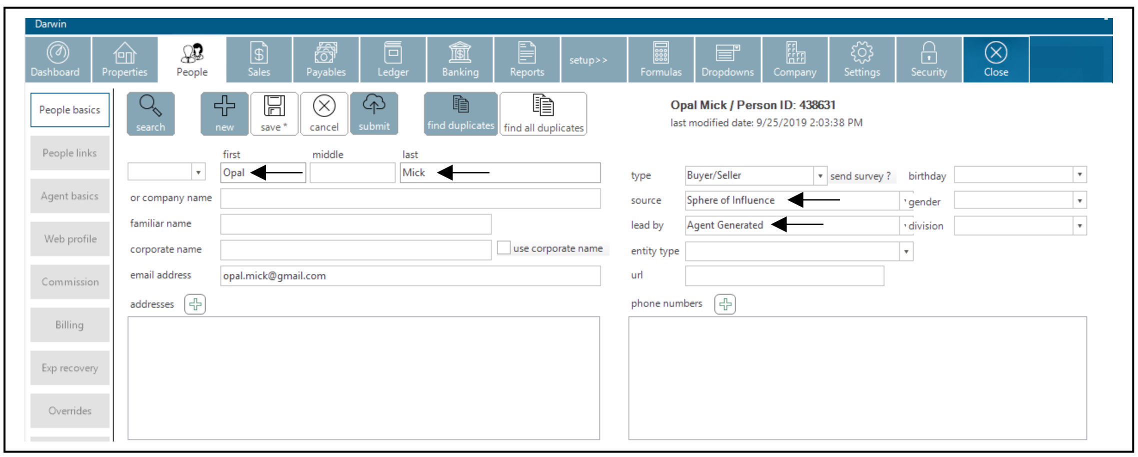
Under PROPERTIES. Select Property Basics. Select your agent under Misc Agent. Enter the Selling Price. Enter the Pending Date. Enter the Close Date.



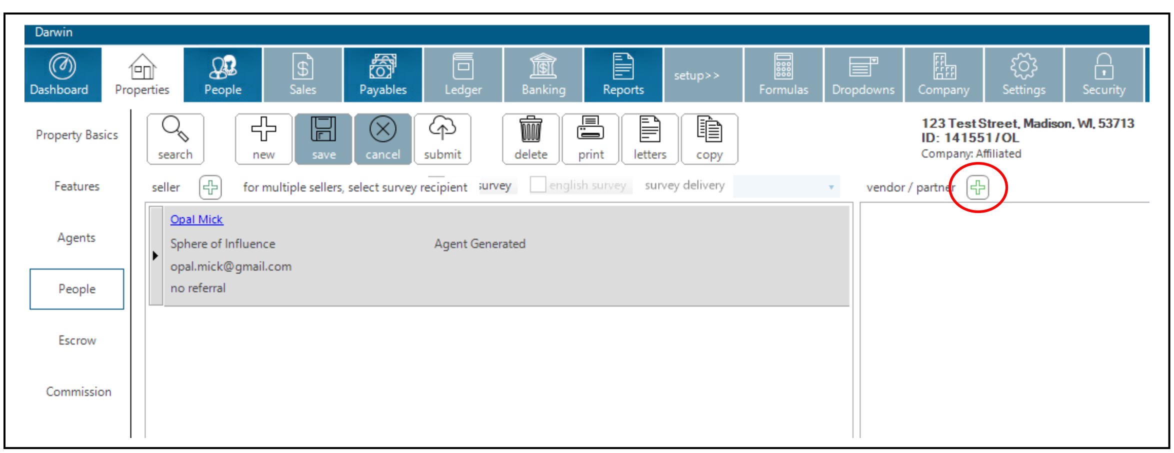
Under PROPERTIES. Select People. Select the green plus icon next to Seller. Enter the name of the client who your agent gave/sent as the Referral.



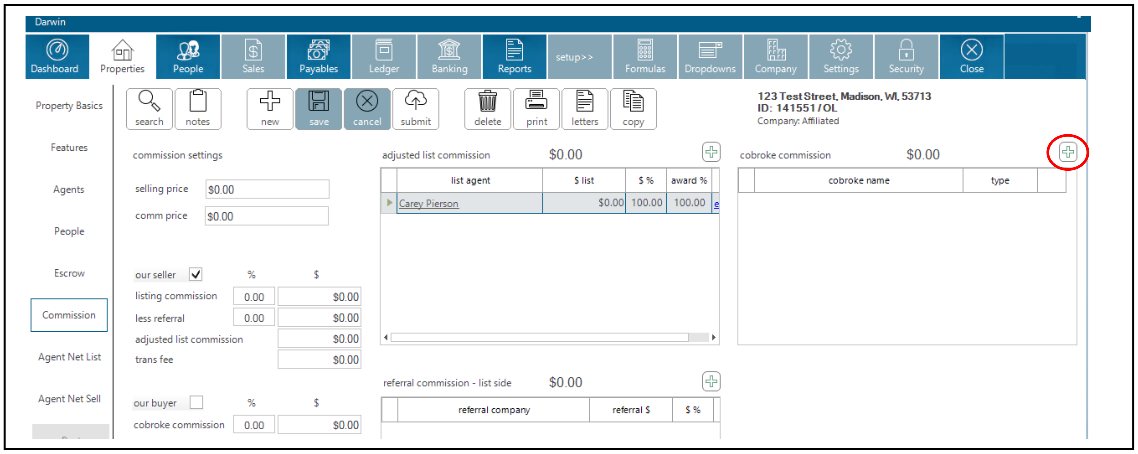
Enter the name of the client who your agent gave/sent as the Referral Select the Seller Name to open the profile. Enter the Source & Lead By.



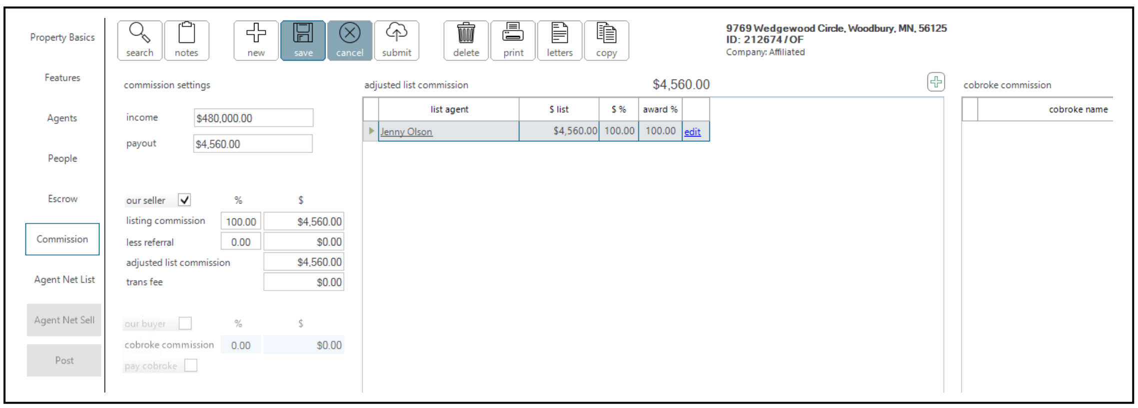
Under PROPERTIES. Select People. Select the green plus icon next to Vendor/Parner to enter the Title Company & Lender. If unknown, do not enter.



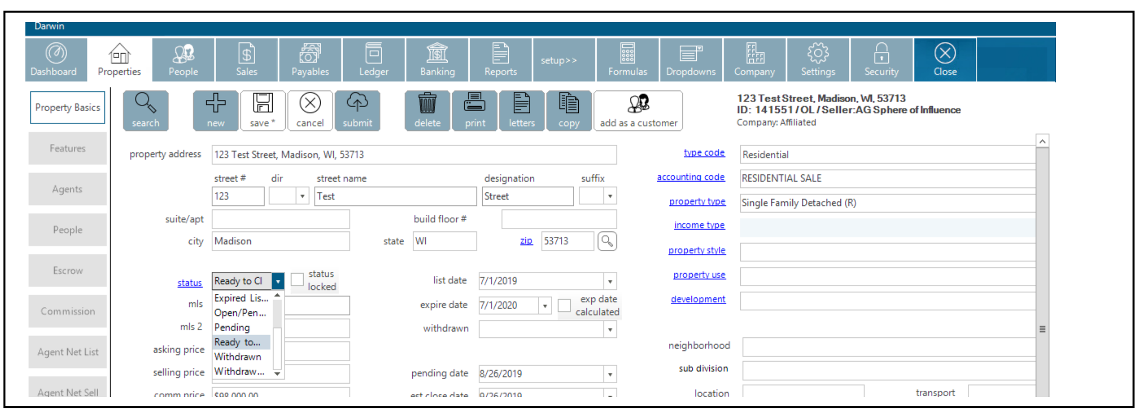
Under PROPERTIES. Select Commission. Select the green plus icon next to cobroke commission. Enter the firm the referral is from along with the agent's name.



The Income will be the Sale Price. The **Payout** will be the referral check amount. Under Listing Commission enter 100%.

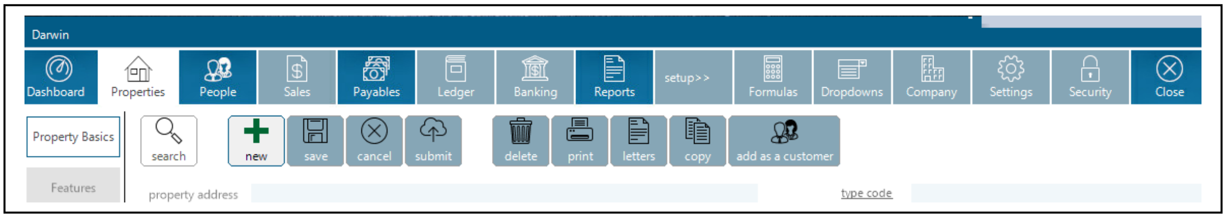


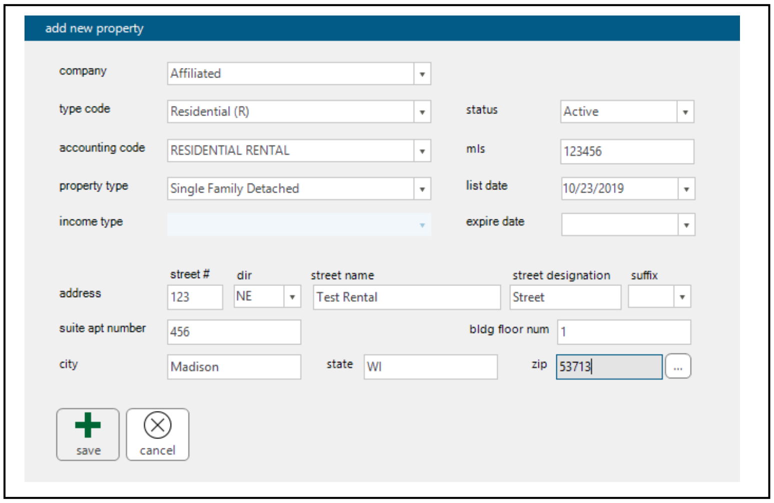
Under PROPERTIES. Select Property Basics. Change the status to Ready to Close.



Rental Commission

Under PROPERTIES. Select New. Enter



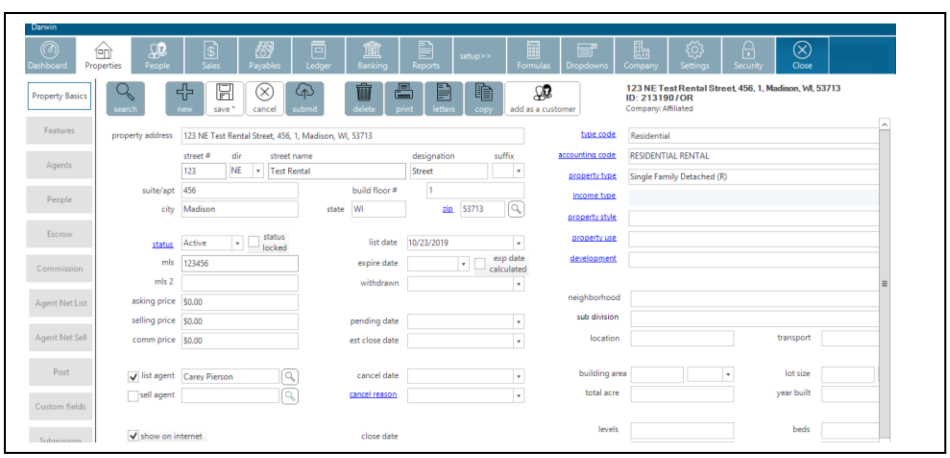


Select the **Type Code** as Residential (R). Select the **Accounting Code** as *Residential Rental*. Select the **Property Type** accordingly. You might not always have the MLS number. If not, enter the property address. Enter the **address**, **suite apt number, bldg floor num, city, state & Zip. Save**.

For the next set of steps, you will be in the Properties Tab:

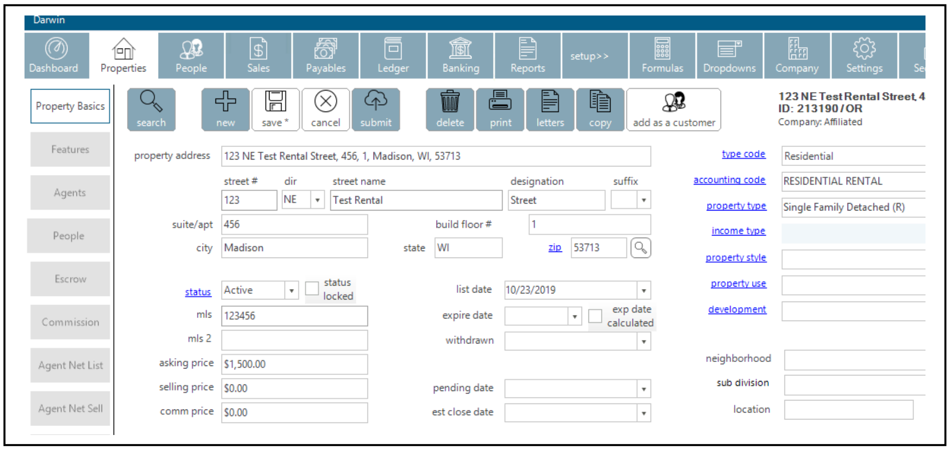
Adding List Agent

Under PROPERTIES BASIC. Select the magnifying glass icon to search for the **List Agent** *Double click to select the name. **Save**.



Adding Rental Asking Price

Under PROPERTIES. Select Property Basics. Enter the monthly rent amount under **Asking Price**. Save.

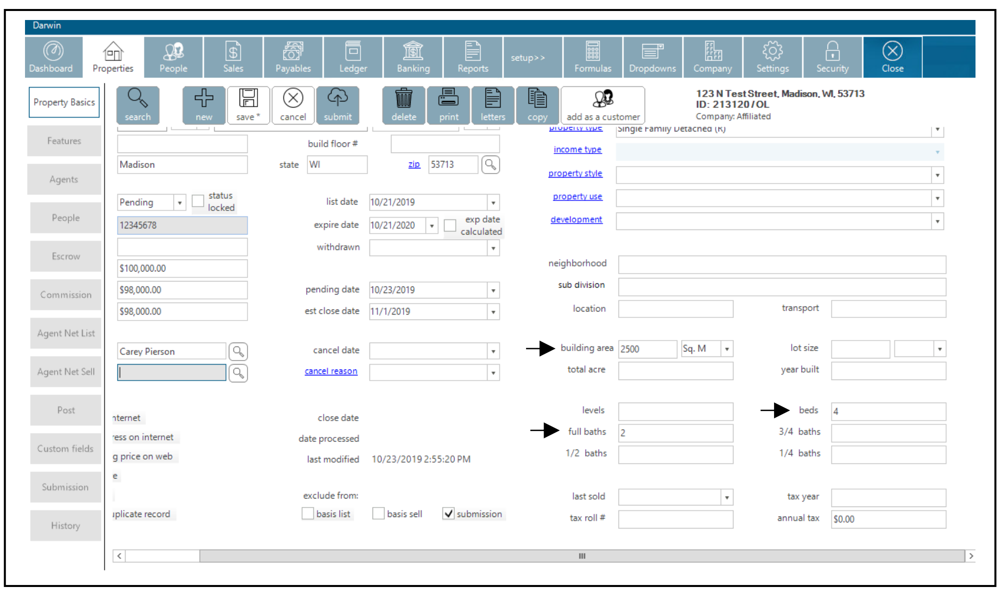


Manual Rental Entry Dash Requirements

For a rental transaction to feed to dash properly the Bed, Baths, Square Footage & Comments must be entered. Property photos must be uploaded to Transaction Plan.

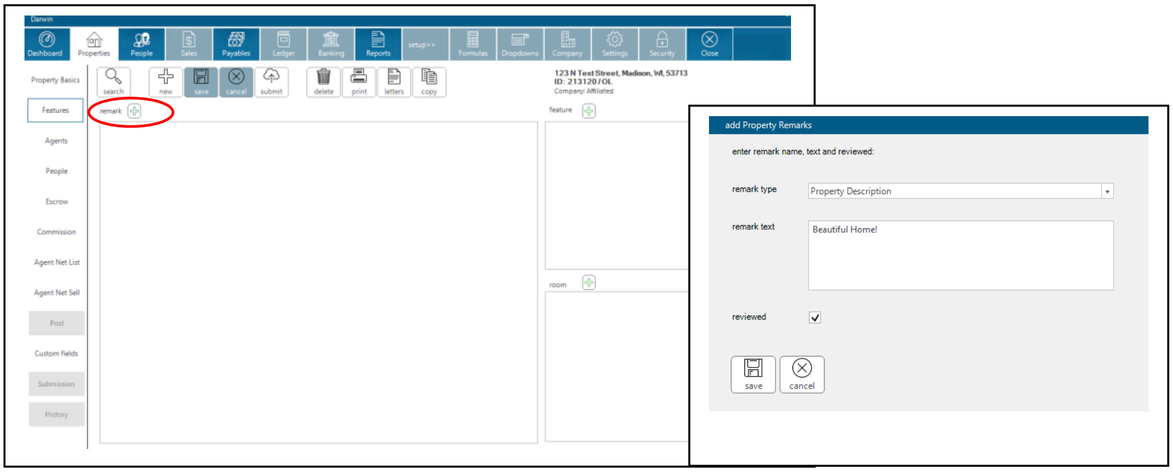
Adding Bed, Bath & Square Footage (Building Area) Details

Under PROPERTIES. Select Property Basics. Enter the square footage under Building Area. Enter the full baths. Enter the number of bedrooms. IMPORTANT: You cannot use a decimal in Darwin. (Example: 2 not 2.0)



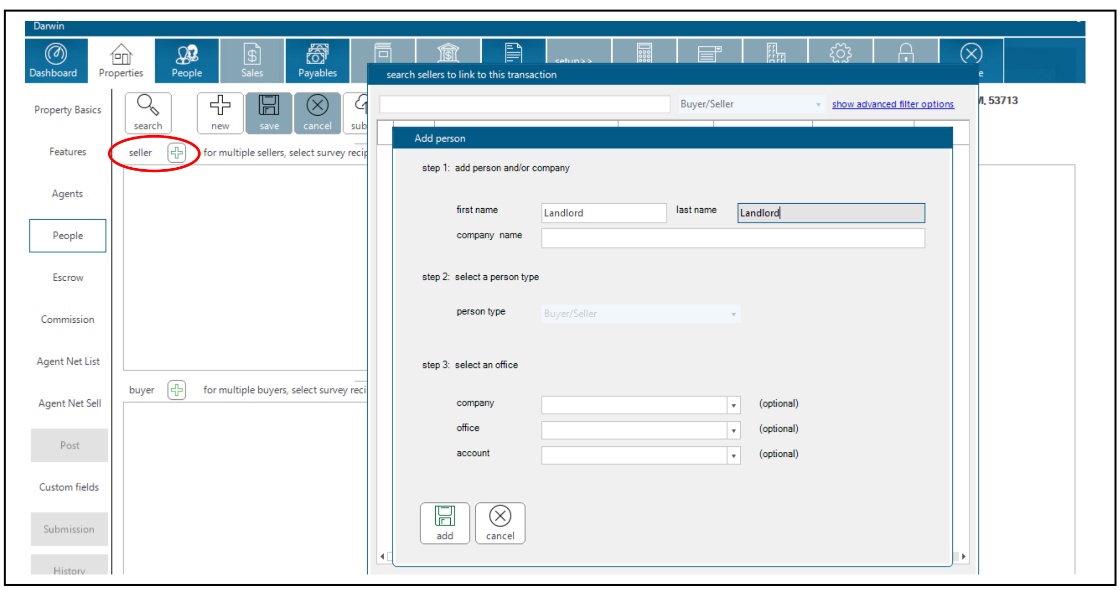
Adding Comments/Remarks

Under PROPERTIES. Select Features. Select the green plus icon next to Remark to open the add property remarks. Select **Property Description** under **Remark Type.** Enter the Comments under **Remark Text.** Select the reviewed box & Save.



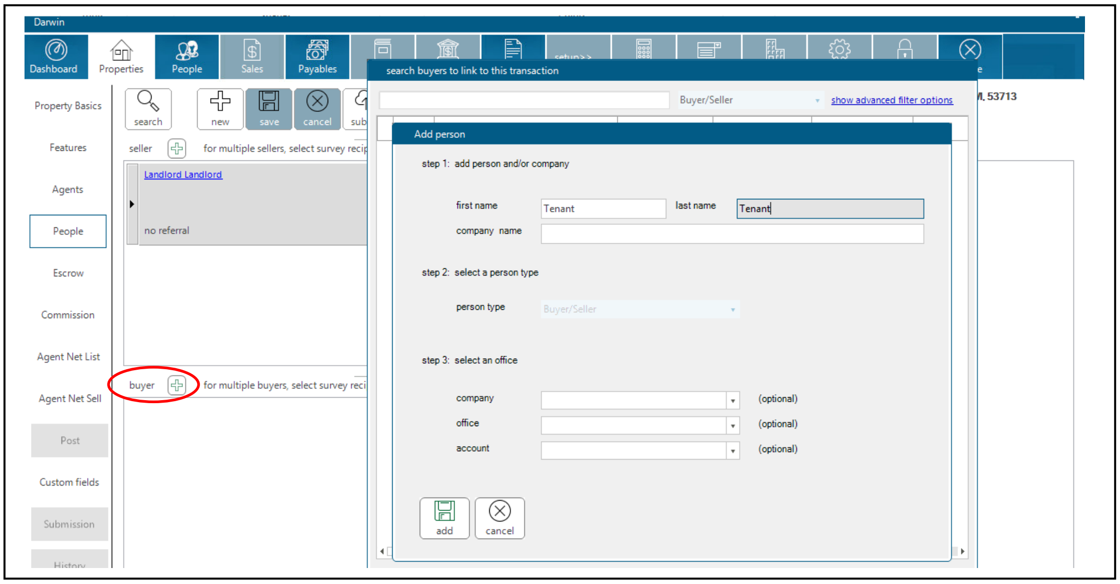
Adding Seller (Landlord)

Under PROPERTIES. Select People. Select the green plus icon next to seller to add person. Select Add Person. The Seller will be the Landlord.



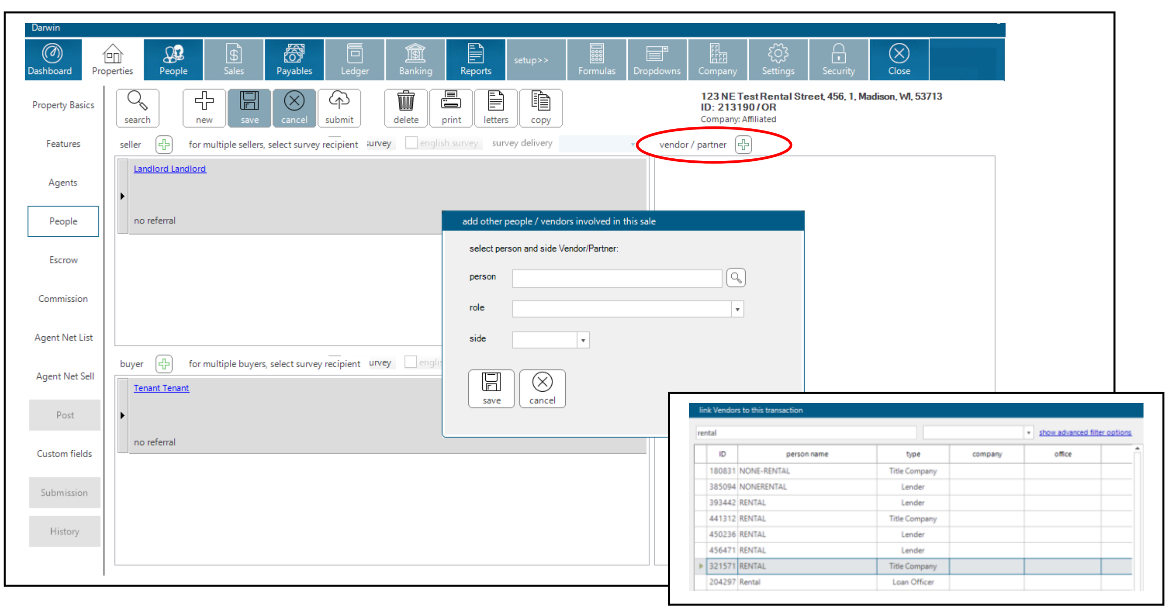
Adding Buyer (Tenant)

Under PROPERTIES. Select People. Select the green plus icon next to buyer to add person. Select Add Person. The Buyer will be the Tenant.



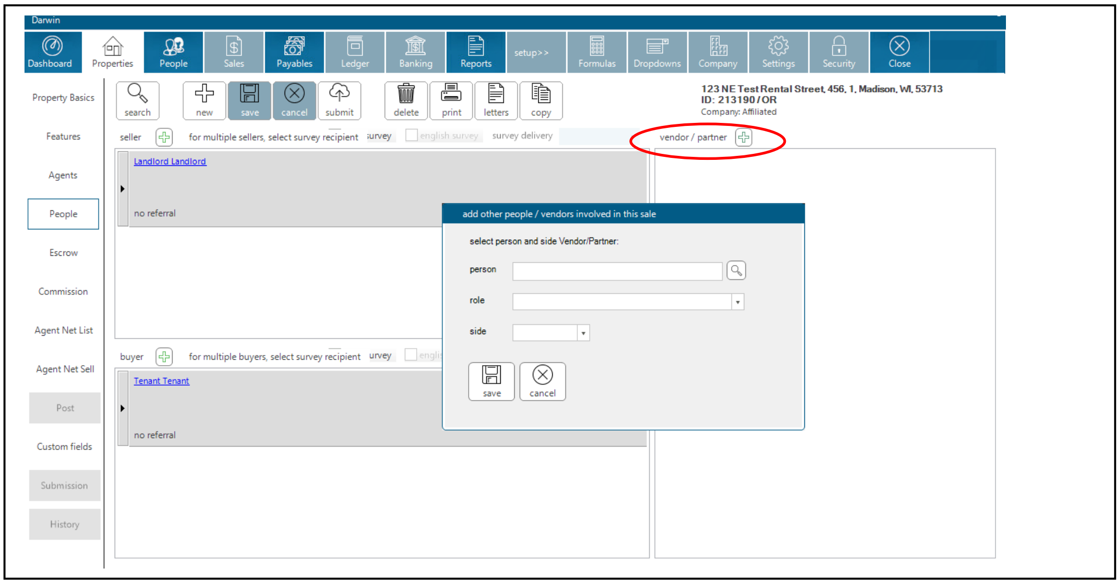
Adding Rental Vendor/Partner Title Company

Under PROPERTIES. Select People. Select the green plus icon next to vendor partner.
To add the Title Company, select the magnifying glass icon to search for Rental. Be sure to select Rental with the Type as Title Company.

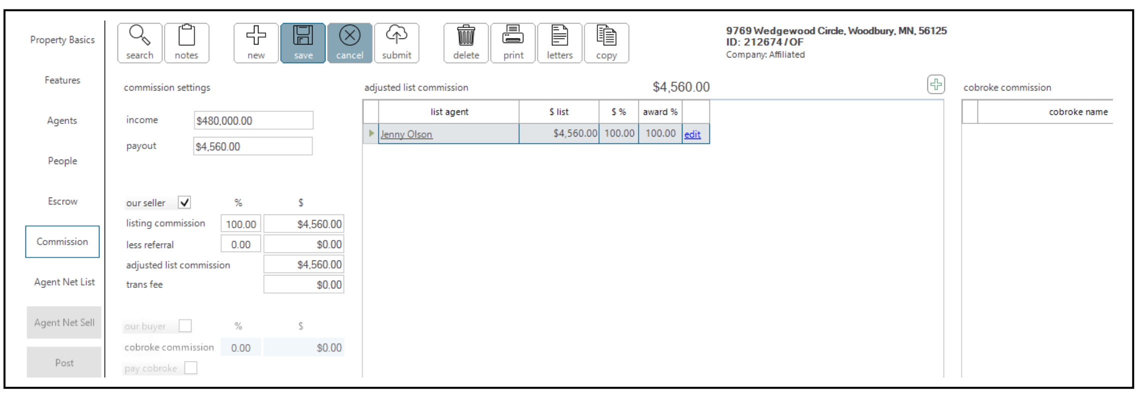


Adding Rental Vendor/Partner Lender

Under PROPERTIES. Select People. Select the green plus icon next to vendor partner. To add the Lender, select the magnifying glass icon to search for Cash. Be sure to select Cash with the type as Lender.



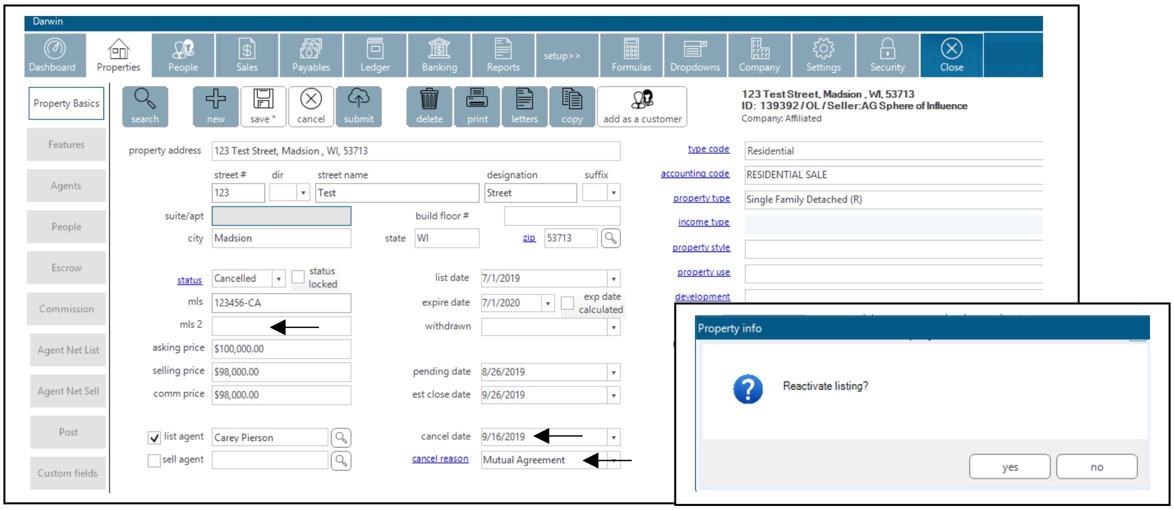
Under PROPERTIES. Select Commission. The Income will be the Sale Price. The **Payout** will be the months rent check amount. Under Listing Commission enter 100%.



Under PROPERTIES. Select Property Basics. Change the status to **Ready To Close**.

Cancelling a Transaction in Pending Status

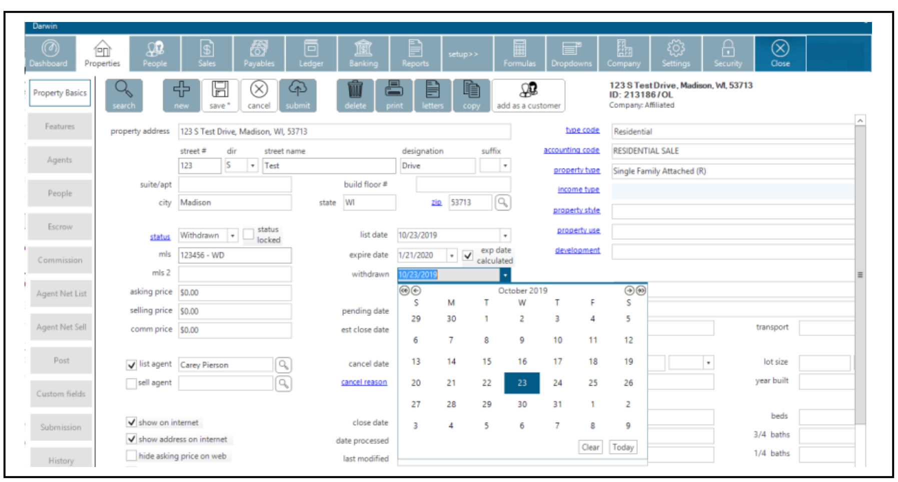
Under PROPERTIES. Select Property Basics. Change the status to Cancelled. Verify "CA" is listed after the MLS#. Enter the Cancel Date, enter the Cancel Reason. Save. If the listing will become active on the MLS with the same MLS#, you can reactivate the listing in Darwin and remove the CA after the MLS#. If a new MLS# will be issued, do not reactive. If a property is reactivated accidently, you must withdraw it.



If you have Earnest Money that needs to be released, verify the deposit has been made under the Escrow tab, as well as verify amount matches the cancellation form. Upload a copy of the cancellation form & earnest money receipt to Cancellations in Dropbox – Example: [Madison 123 Main St 6.5.19]

Withdraw a Transaction

Under PROPERTIES. Select Property Basics. Select the Withdrawn Date. Change the Status to Withdrawn. Enter WD after the MLS number. HINT: You can only withdraw a transaction under Active status.

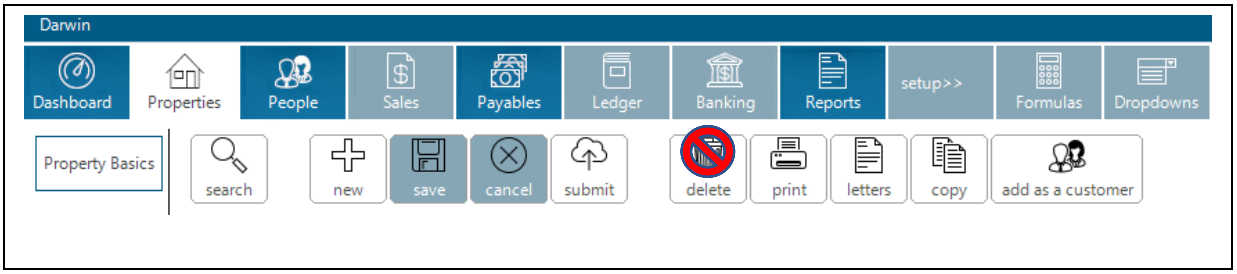


Expire a Transaction

Listings will expire in Darwin from the expiration date entered in the MLS. Use the Dashboard Listing Expiring in 30 days or less to track upcoming expirations.

Delete Transaction in Darwin

Do not delete transactions in Darwin. If a transaction is deleted in Darwin, this will cause an orphan record in Dash. Transactions should always be Cancelled or Withdraw depending on the status.



Orphan Record in Dash

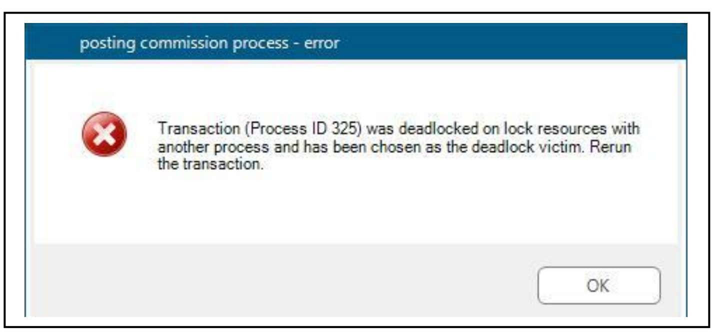
An orphan record in Dash creates a duplicate in Dash. Once you delete in Darwin the link between Dash and Darwin is broke. It leaves a listing without a home. This will cause issues with reporting and agent recognition.

History Log

Darwin has a History log that will show who did what at what time. This is accessible by the IT Department only. Keep in mind when making changes in the system that it is tracked and viewed for troubleshooting.

Lock Notice Error

If you've received the below error message, this is indicating someone else is in the property.

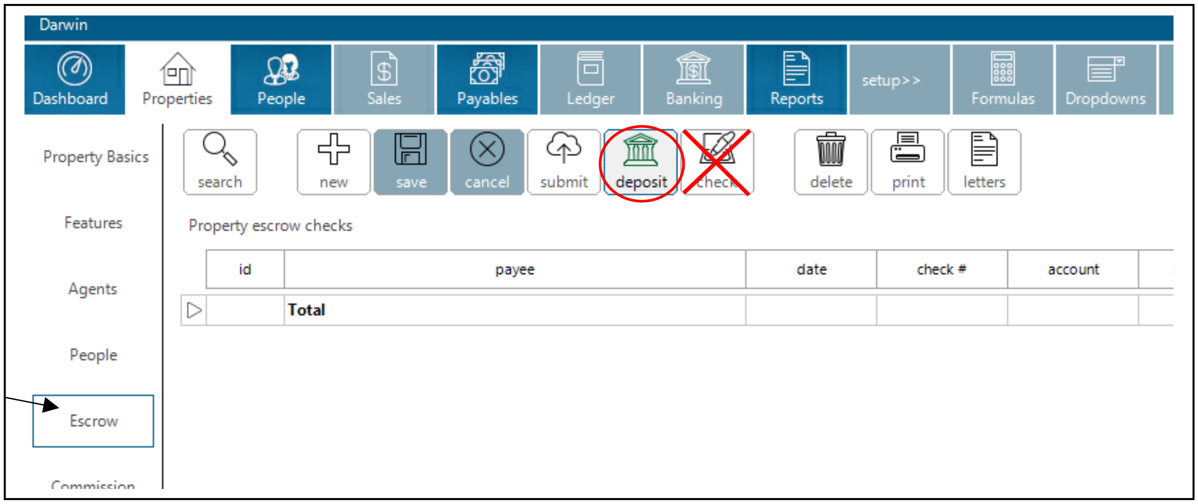


Before Entering Escrow

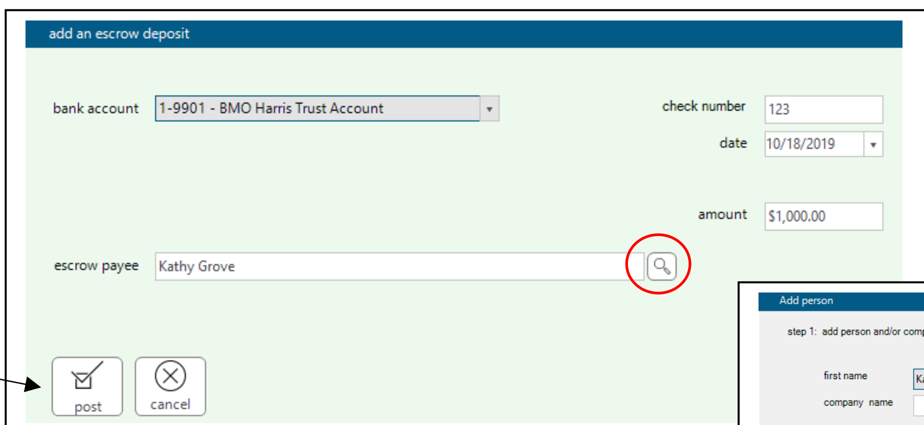
Before entering earnest money, make sure the check is made out to **Century 21 Affiliated**.

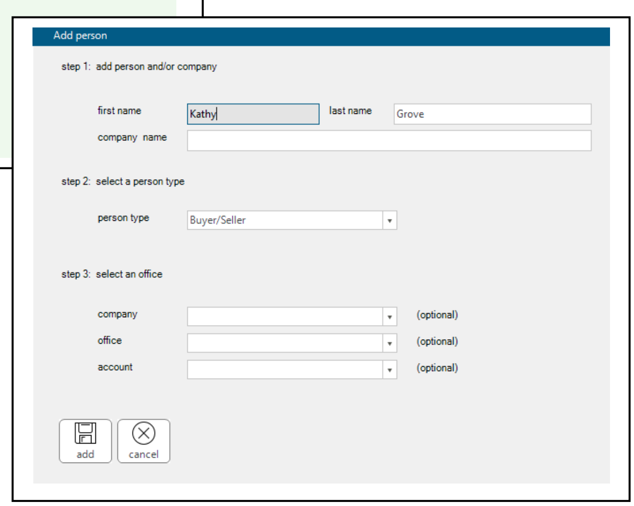
Recording Escrow

Under PROPERTIES. Select Escrow. Select deposit. DO NOT SELECT CHECK. Check = Withdraw



Select the **Bank Account** from drop-down. Enter the **<u>Check Number Rec'd</u>** followed by: PC (personal check), MO (Money Order), BC (Business Check), or CC (Cashier's Check). Enter the **Date** the check was deposited to the Affiliated Trust account. Enter the **Amount.**



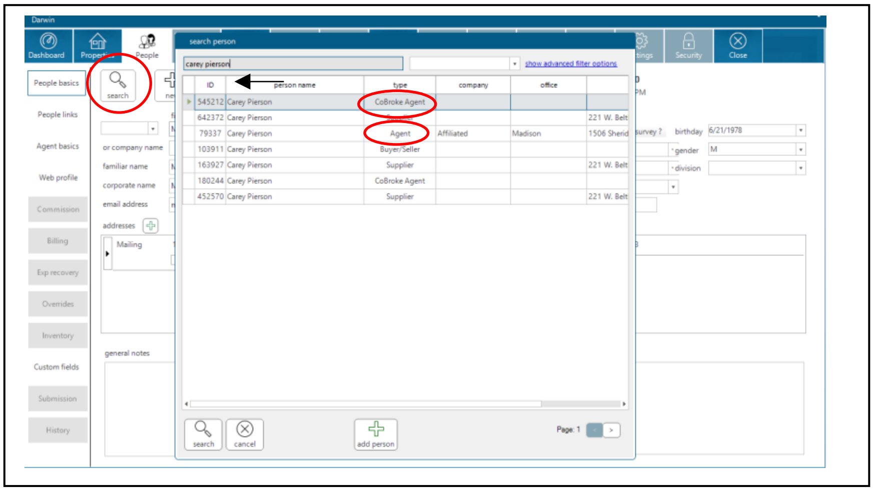


To add an **Escrow Payee** use the magnifying glass icon to Add Person. Enter the **First Name**, **Last Name** written on the check. Select the **Person Type** as Buyer Seller. **Add.**

Select **Post** after reviewing escrow deposit.

Search Existing Agent in Darwin

Under PEOPLE. Select Search. Search for the agent, select the magnifying glass icon or hit enter on your keyboard. To open the agent profile, you must select the Type as Agent under Person Name.



Edit Existing Agent

Under PEOPLE. Search and select agent to open the profile. Navigate throughout People Basics, People Links, Agent Basics & Web Profile to adjust information as needed.

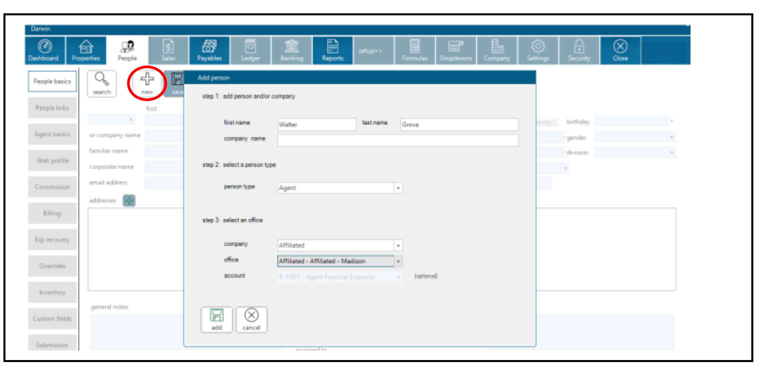
Before Adding New Agent

Agents can be added to Darwin after the Affiliated email confirmation from the IT Department has been received.

Adding a New Agent

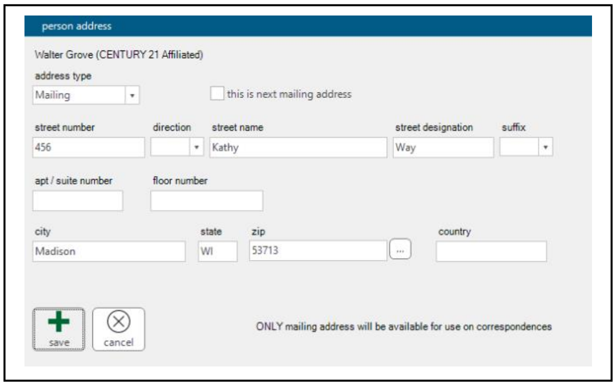
These steps you will be in the People Tab

Under PEOPLE. Select People Basics. Select **New**. Enter **First** Name, **Last** Name, select the **person type** to be agent, select the **company** as Affiliated. Select the agent's main **office** location. **Add**. HINT: Company = Entity.



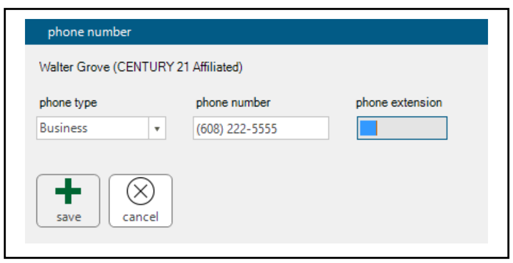
Adding Agent Mailing Address

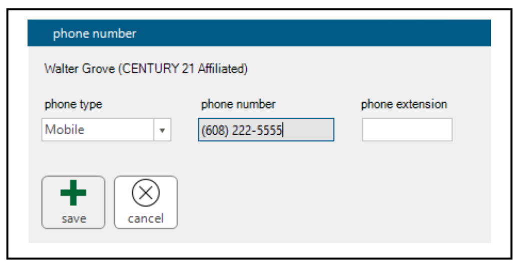
Under PEOPLE. Select PEOPLE BASICS. Select the plus icon next to Addresses. The **Address Type** will default to mailing. Enter the **street number**, **designation**, **city**, **state** & **zip**. Save.



Adding Agent Phone Numbers

User PEOPLE. Select PEOPLE BASICS. Select the plus icon next to Phone Number. Enter the **Business** (main office location) and **Mobile** number. Save.



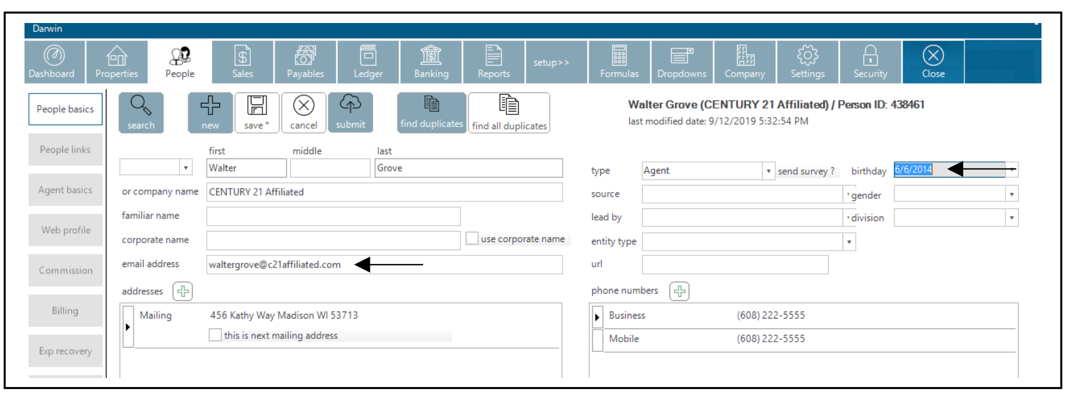


Adding Agent Email

Under PEOPLE. Select PEOPLE BASICS. Enter the new agent Affiliated **email** address. Save.

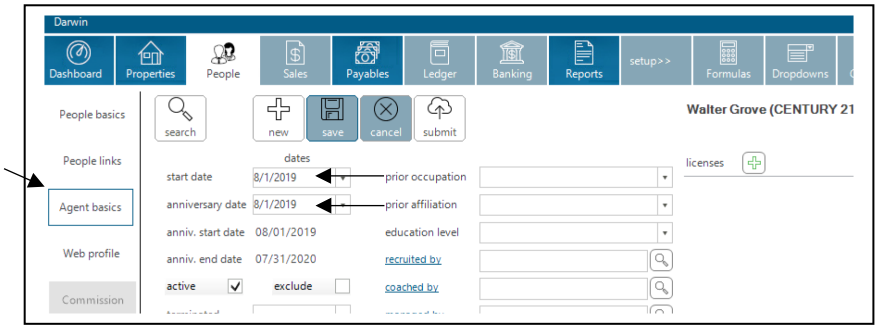
Adding Agent Birthday

Under PEOPLE. Select People Basics. Enter the agent **birth date**. Save.



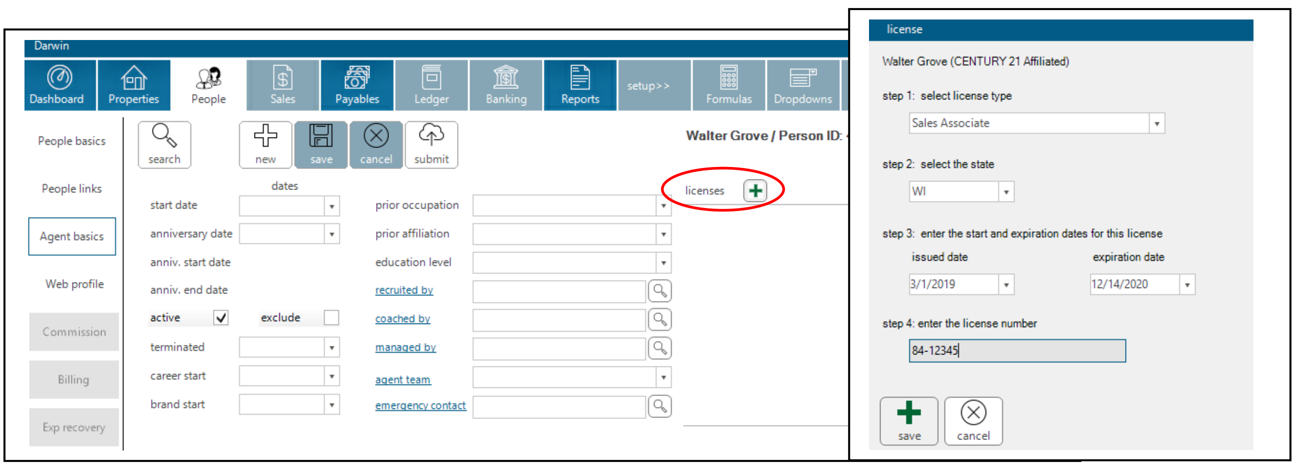
Adding Agent Start Date & Anniversary Date

Under PEOPLE. Select AGENT BASICS. Enter the Start date (date ICA was signed). Enter Anniversary date (same as start date).



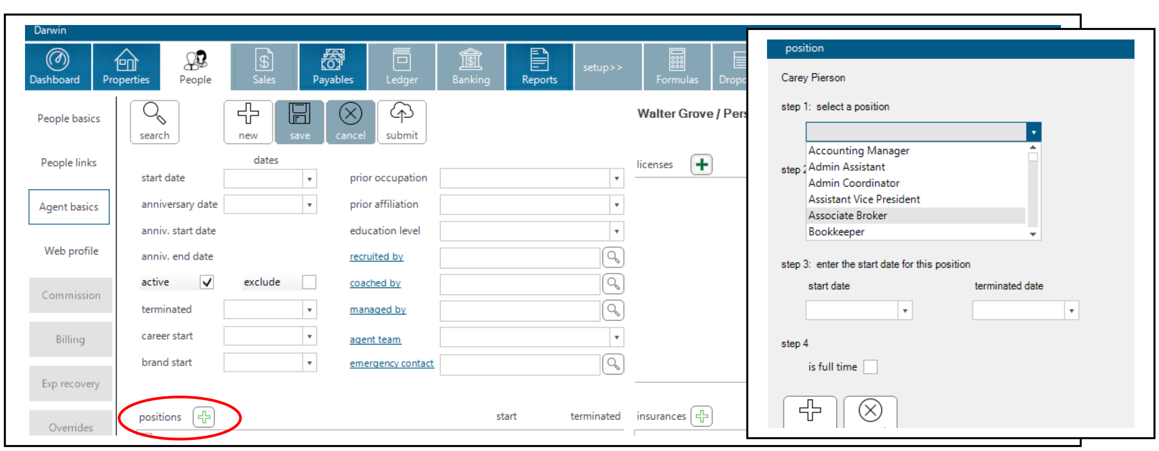
Adding Agent License / Sales Associate

Under AGENT BASICS. Select Agent Basics. Select the plus icon next to License. Select License Type as Sales Associate. Select the state. Enter the issue date, expiration date & license number. Save.



Adding Agent Position / Associate Broker

Under AGENT BASICS. Select Agent Basics. Select the plus icon next to Positions. Select Position as Associate Broker. Enter the Start date (date ICA was signed) Select full time. Save.



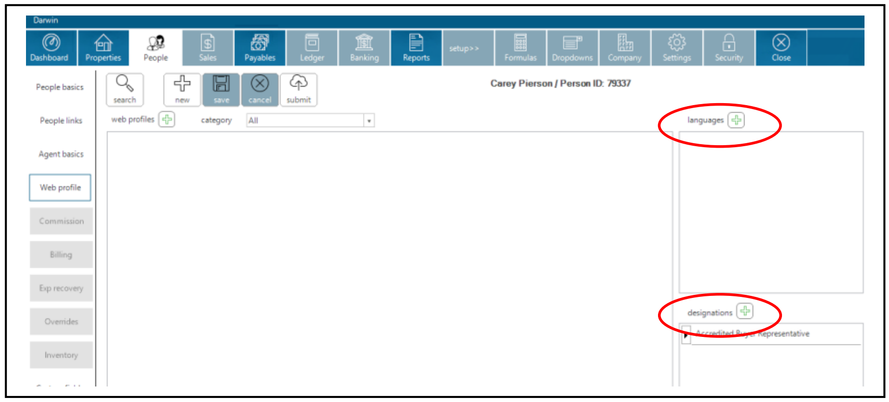
Adding Agent Languages

If your agent is bilingual, additional languages can be added to their profile.
Under WEB PROFILE. Select the plus icon next to Languages. Select Language. Save.

Adding Agent Designations

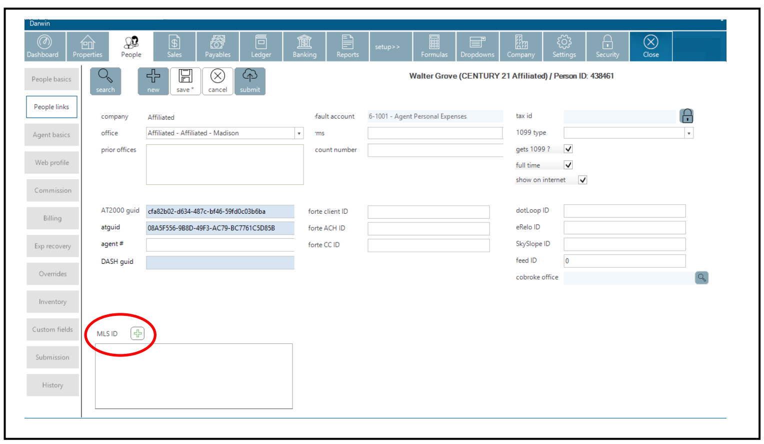
Under WEB PROFILE. Select the plus icon next to Designations. Select Designation. Save.

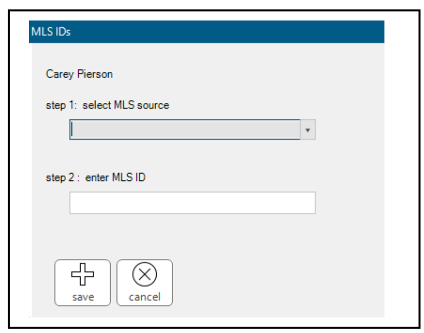
Example: Fine Homes & Estates.



Enter Agent MLS ID Number

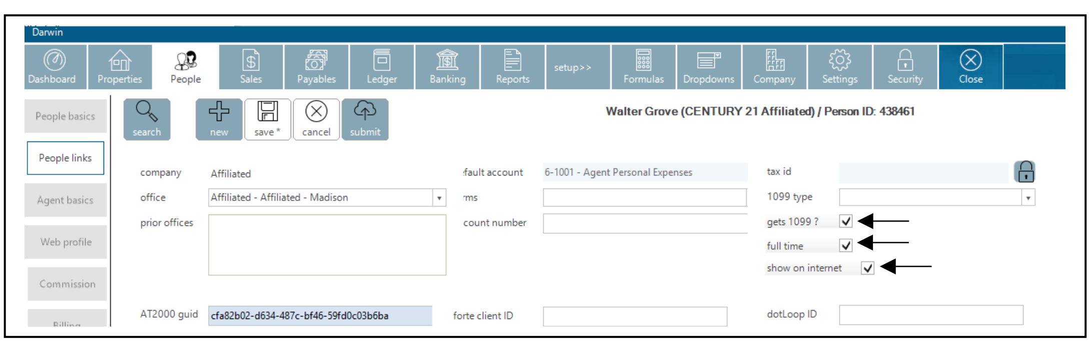
Under PEOPLE. Select People Links. Select the green plus icon next to MLS. Enter the MLS Number, select the MLS designation. Repeat steps for multiple MLS ID's.





Verify Agent Defaults

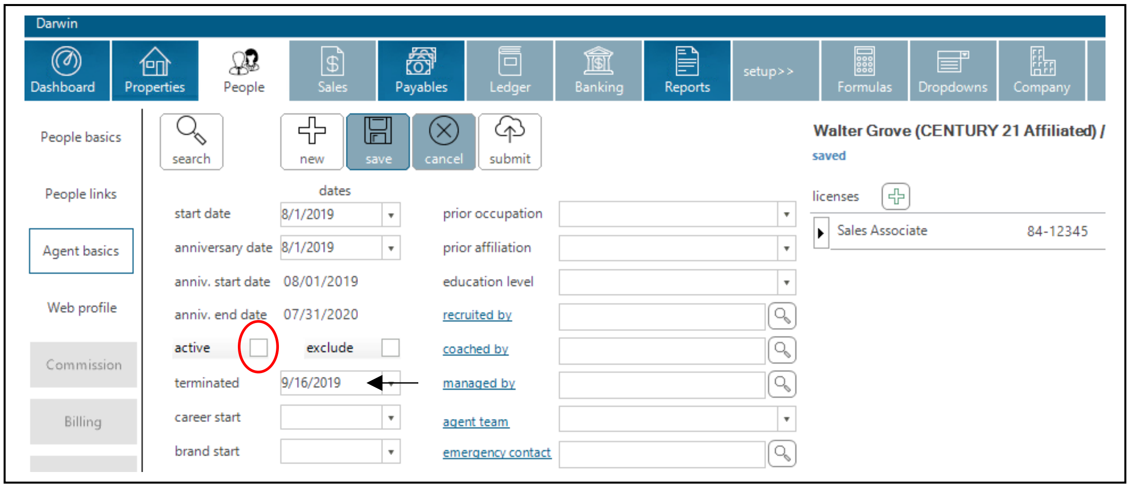
Under PEOPLE. Select People Links. Select **1099** box. Select **Full Time** box. Select **Show on Internet** box.



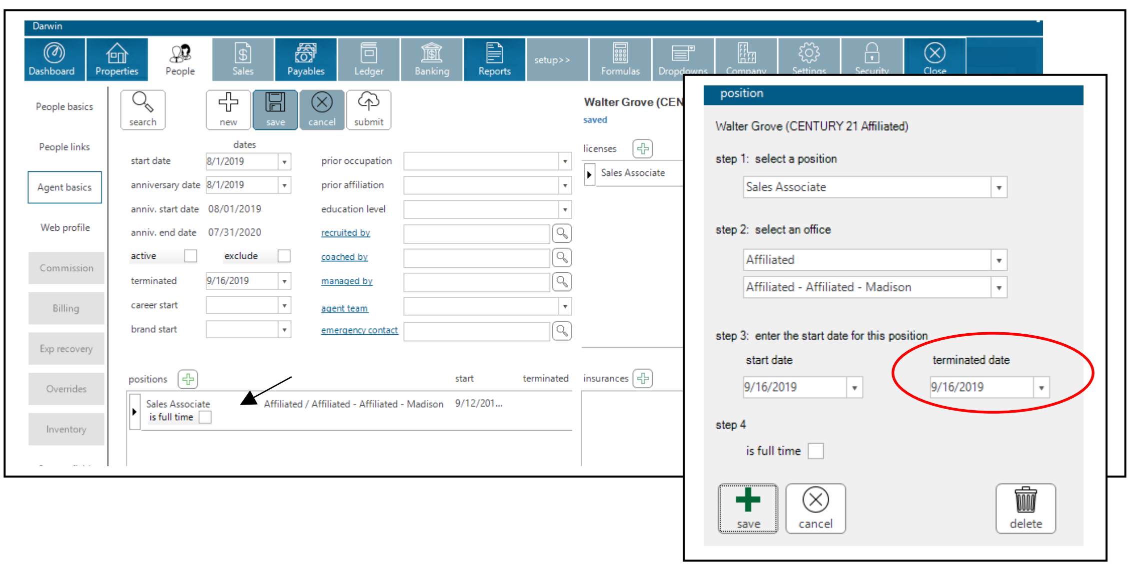
Terminating an Agent

Under PEOPLE. Select Agent Basics. Search for the agent.

Step One: Enter Terminated Date. Uncheck the active box.

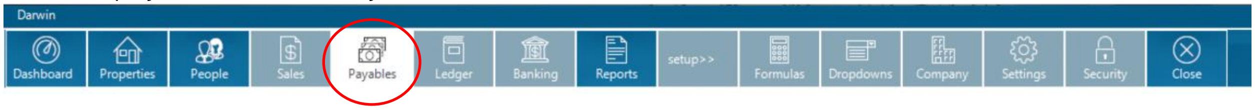


Step Two: Under Positions, select inside the box to open. Enter Terminated date. Save.



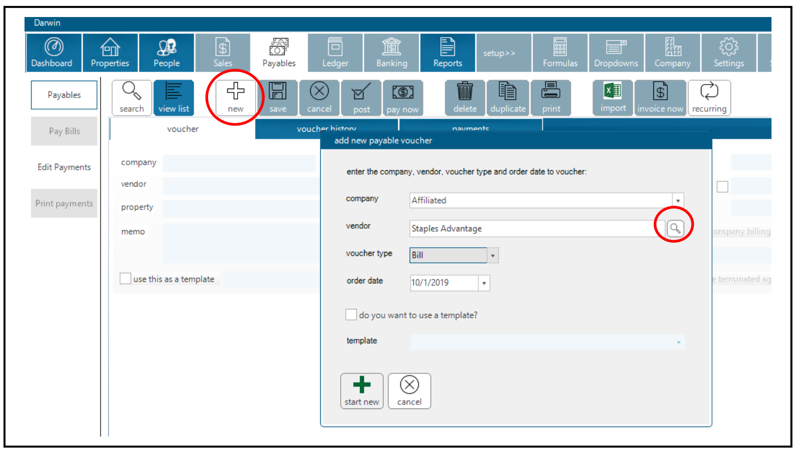
Payables

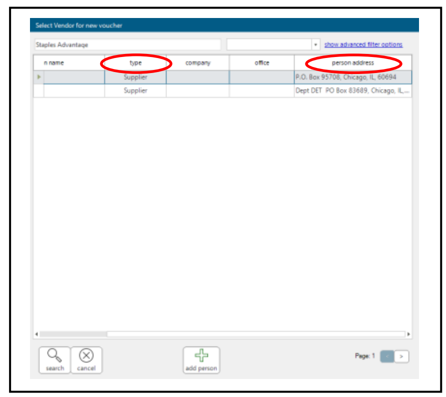
These steps you will be in the Payable tab



Adding a Payable

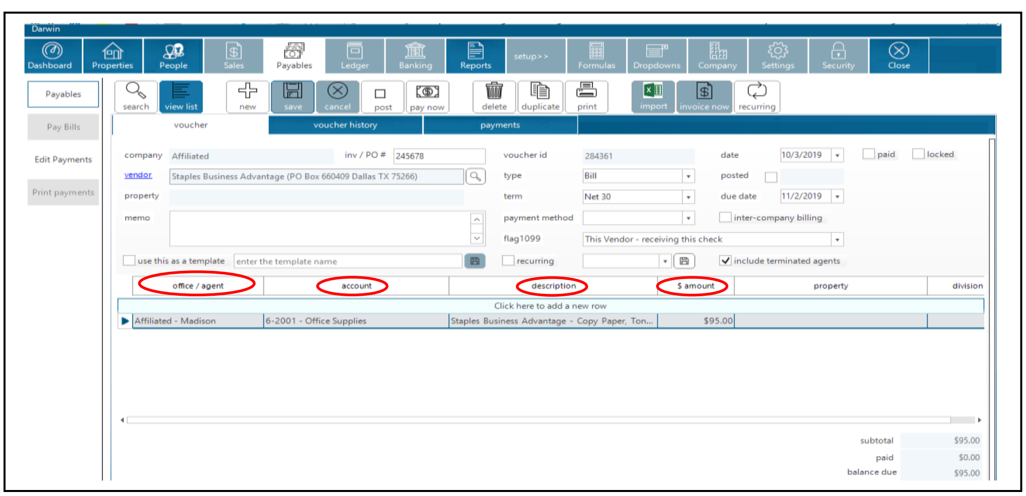
Under Payable. Select New. **Company** Affiliated (Default) select the magnifying glass icon to Search for the **Vendor.** Confirm the Type is Supplier. *Before Selecting the Vendor* Confirm the address under Person Address is the same address listed on the invoice. Select *Bill* for the **Voucher Type**. Enter the **Order Date**. Select Start New.





Adding Invoice Details

Enter the **Invoice/Account Number** (do not add dashes or space due to the limited space on the check when printing)**,** Select the **Term** or enter the **Due Date**. Select the **Office or Agent** under, the **Account** will default from the vendor that is selected, enter a **Description** of the invoice, enter the **Amount**. Select Save. Select Post. HINT: Make sure to tab out of the description before selecting Save & Post.



Dashboard Property Information

Each category will have a "# to fix" that will show by entity the number of transactions that need attention.
Select the refresh icon to refresh the data. Each category will update to the current # to fix.
Double click on the category that needs attention.

property information

property issues	# to fix
Active listings with no Expire dates	158
City, State, Zip Incomplete	121
Duplicate MLS #	85
Listing Guestimated Expired Date	0
Listing with List Agent Missing	319
Listings missing Seller source	0
Listings with Seller email missing	482
missing Closing dates	40
MLS # blank	106

Active Listings with no Expire date
Verify the MLS or MLS Print-Out for the expiration date, update Darwin

City, State, Zip Incomplete
Verify these fields are completed, if blank, use the MLS to complete

Duplicate MLS#
Search the MLS, one of the transactions may be cancelled. If the property is a duplicate or entered into Darwin twice, Withdraw (Listings/Active) or Cancel (Pending) the duplicate transaction. If Cancelling the property, verify the "CA" after the MLS ID to make it unique .

Listing Guestimated Expired Date
Verify the expiration date field is completed

Listing with List Agent Missing
Listings with no Listing Agent selected will not send to Dash. Verify the Listing Agents name is selected. Verify the transactions is not mistakenly entered as a Sale Transaction. Verify the agents MLS ID# is listed within the agent's profile.

Active Listings with no Expire date
Verify the MLS or MLS Print-Out for the expiration date, update Darwin

City, State, Zip Incomplete
Verify these fields are completed, if blank, use the MLS to complete

Duplicate MLS#
Search the MLS, one of the transactions may be cancelled. If the property is a duplicate or entered into Darwin twice, Withdraw (Listings/Active) or Cancel (Pending) the duplicate transaction. If Cancelling the property, verify the "CA" after the MLS ID to make it unique.

Listing Guestimated Expired Date
Verify the expiration date field is completed

Listing with List Agent Missing
Listings with no Listing Agent selected will not send to Dash. Verify the Listing Agents name is selected. Verify the transactions is not mistakenly entered as a Sale Transaction

Listing missing Seller Source
Verify from Transaction Management the Source of where the agent received their business, update Darwin. If not noted, follow up with agent for source information, update Darwin.

Listings with Seller email missing
Verify from Transaction Management for seller email, update Darwin. If no email is provided, or the seller would not like to receive an email, leave blank. This will continue to reflect on your board until the property closes or expires.

Missing Closing Dates
Verify the Closing Date field is entered. If the date has changed update Darwin to the newest closing date

MLS# Blank
Verify the MLS ID field is entered. FSBO or Listings not in the MLS still need an ID within the field. If NO MLS, use the street address.

Dashboard Pending Issues

pending last update: 10/9/2018 2:32:34 PM

pending issues	# to fix
Pendings missing Buyer source	622
Pendings missing closing date	0
Pendings past Closing date	817
Pendings with Buyer email missing	482
Pendings with no Company $	93

Pendings missing Buyer Source
Verify from Transaction Management the *Source* of where the agent received their business, update Darwin. If not noted, follow up with agent for source information, update Darwin.

Pendings missing closing date
This field should be "0" Verify from Transaction Management for the closing date, update Darwin. If no date is provided, follow up with the agent to collect the closing date

Pendings past Closing date
This field should be "0" Verify from Transaction Management if the date has changed, if changed, update Darwin. If the property was cancelled, follow the cancellation process.

Pendings with Buyer email missing
Verify from Transaction Management for seller email, update Darwin. If no email is provided, or the seller would not like to receive an email, leave blank. This will continue to reflect on your board until the property closes or expires.

Pendings with no Company $
Verify the Sale Price & Commission are entered. Verify if there are 2 agents listed on the transaction. The second agent's percentage needs to be manually added in the commission tab.

Dashboard Person Information

person information last update: 10/9/2018 2:32:17 PM

people issues	# to fix
Agent MLS ID not filled in	0
Buyer or seller is blank	0
Duplicate Agent MLS ID	0
Mortgage Co is Blank	0
Title Co Seller is blank	0

Agent MLS ID not filled in
Search your MLS or reach out to the agent to receive their MLS ID, update the agent's profile within Darwin. Do not enter a fake MLS ID#, if you do not have, leave blank

Buyer or seller is blank
Verify Transaction Management for the buyer or seller information. Verify all information including name(s), address, email & phone number. If unknown, contact the agent for the client's information

Duplicate Agent MLS ID
Verify in MLS or with agent the MLS ID#. Verify there is only 1 agent profile within Darwin

Mortgage Co is blank
Verify from Transaction Management for the Lender, update Darwin. NOTE: This may update by the time of receiving the closing check and disclosure, always verify and update at closings.

Title Co Seller is blank
Verify from Transaction Management for the Title Company, update Darwin. NOTE: This may update by the time of receiving the closing check and disclosure, always verify and update at closings.

Transaction Plan Tools

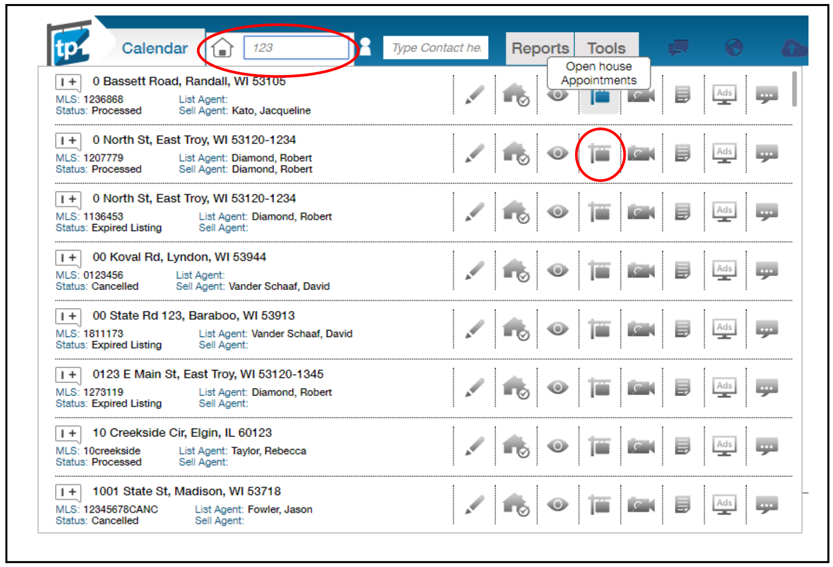
To accesses Transaction Plan log into https://darwin.transactionplan.com/TP/1-all.shtml

Open Houses in Transaction Plan

Scheduling an Open House in Transaction Plan.

Next to the house icon, enter the address or MLS# of the property.

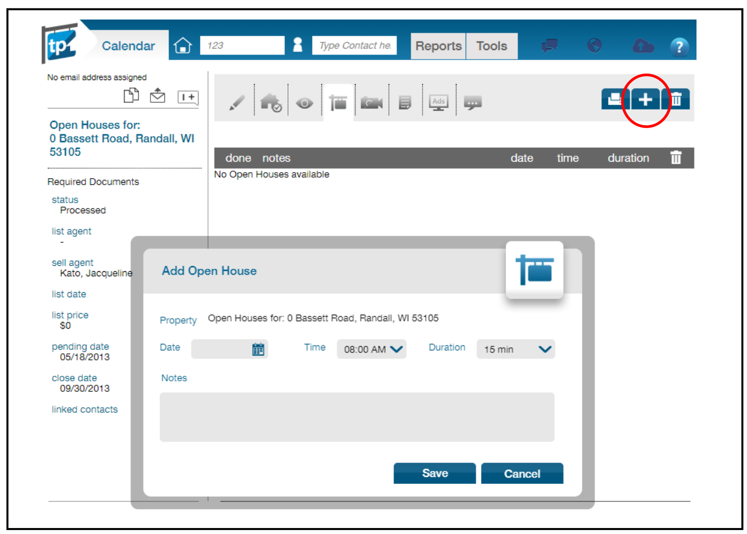
Select the yard sign logo to open Appointment Details.



Select the **+** icon to Add Open House

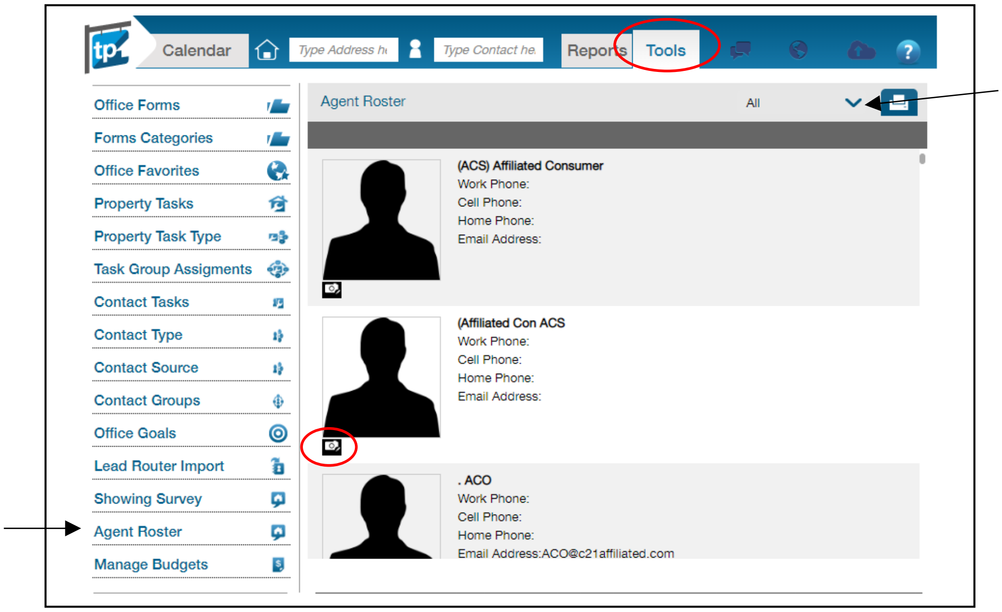
Enter the **Date** of the Open House
Enter the **Start Time**
Enter the **Duration**
Add additional **notes** if applicable

Save



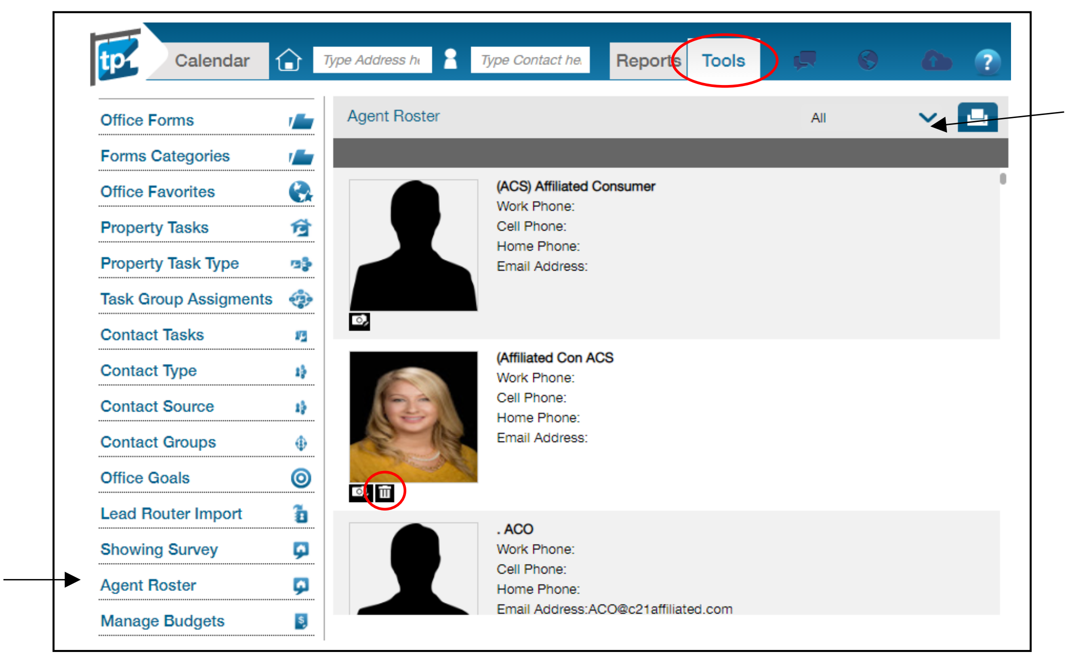
Agent Photo in Transaction Plan

To add an agents photo to Transaction Plan, select **Tools**, then select **Agent Roster**. Scroll to find your agent. If you are in multiple office locations in Darwin, use the down arrow to filter your office selection. Select the camera icon to upload the photo from your computer.



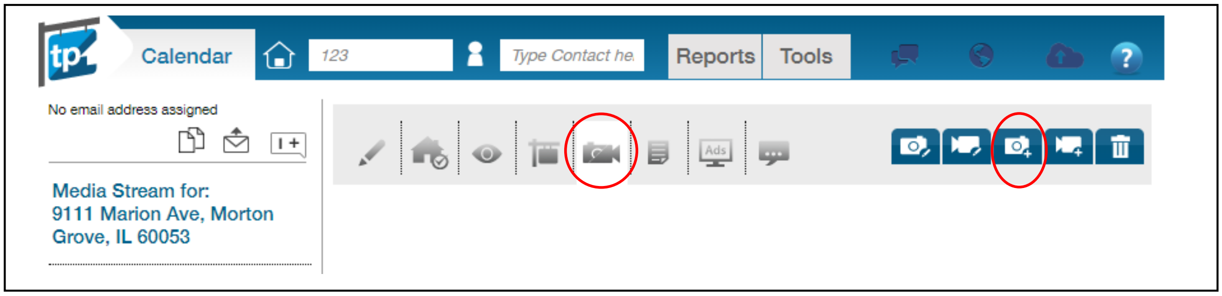
Removing Agent Photo in Transaction Plan

To remove an agent's photo in Transaction Plan, select Tools, then select Agent Roster. Scroll to find your agent. If you are in multiple office locations in Darwin, use the down arrow to filter your office selection. Select the trash can icon to delete the photo. Notify HelpDesk@c21affiliated.com of the change to be updated in Dash.



Transaction Plan Property Photos

Listings that do not have photos can be downloaded from the MLS or Realtor.com and uploaded to the Property in Transaction Plan. When you search for the address, select the video camera icon to manage media, then select the camera with the plus icon to add multiple photos.
HINT: When downloading photos from the MLS or Realtor.com, remember to label the photos 1,2,3 to make uploading them to Transaction Plan in order easier.

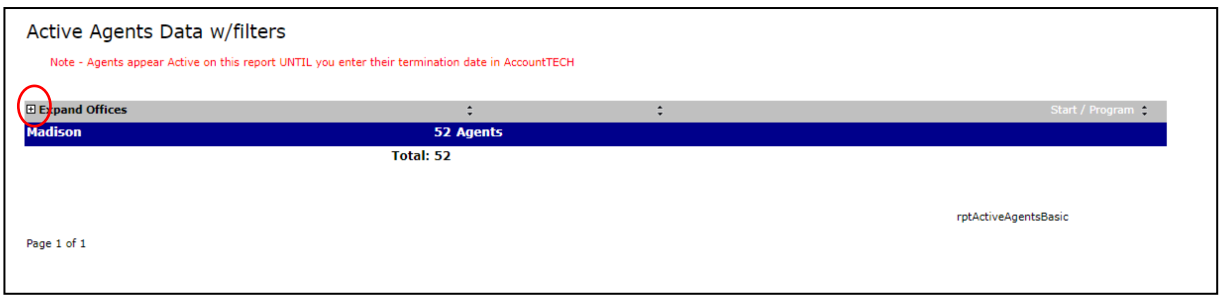


Transaction Plan Reporting

Reports: Agents

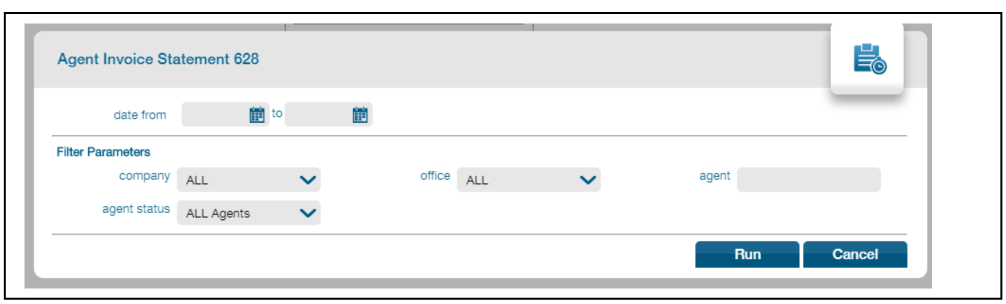
Active Agent data w/ filters (259)

Pull this report to view agent credentials from agent profile in Darwin. HINT: Expand to view report.



Agent Invoice Statement (628)

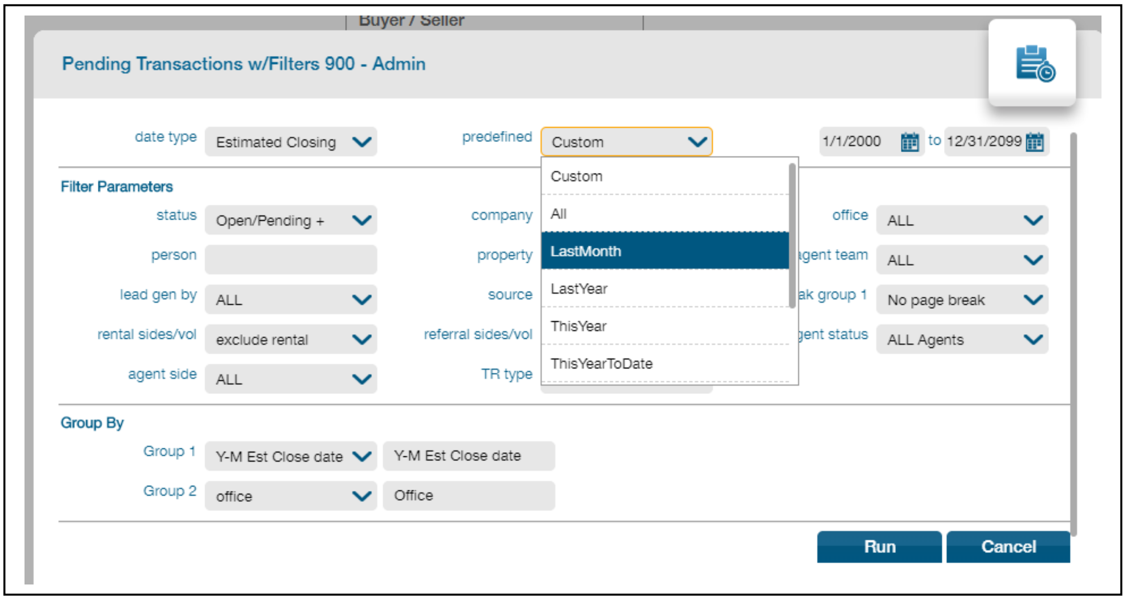
Pull this report to view outstanding agent invoice. Select the date range, status, office (if applicable) or agent name, select Run. Affiliated agents also have access to this report through Transaction Plan.



Reports: Pending

Pending Transactions w/ filters (900)

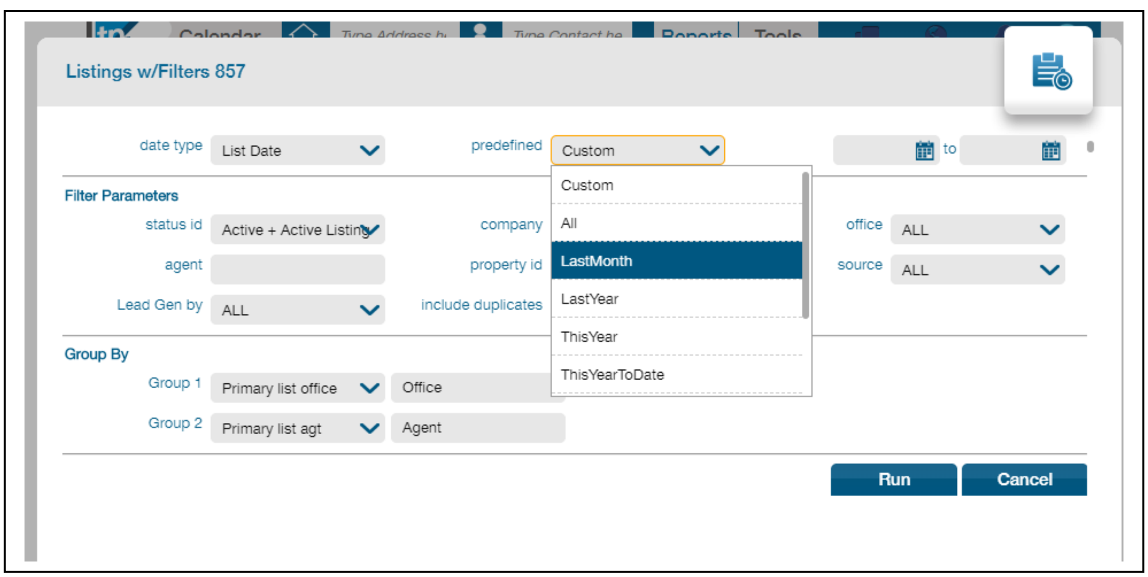
Select the predefined category (last month, last year) range **DO NOT SELECT CUSTOM**. Then select the date range. Next select the desired filtered parameters for your report. Select Run.
HINT: You must select the + icon to expand additional information in the report.



Reports: Property

Listings w/ filters (857)

Select the predefined category (last month, last year) range **DO NOT SELECT CUSTOM**. Then select the date range. Next select the desired filtered parameters for your report. Select Run.
HINT: You must select the + icon to expand additional information in the report.



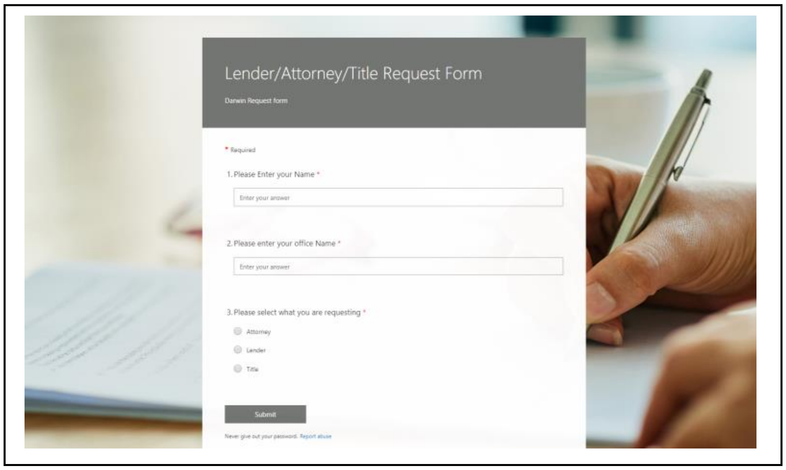
Request Form

How To Submit Request Form

When a Lender, Title Company, Co-Broke, Co-Broke Office Address, or Attorney needs to be added to the system, the request form must be completed.

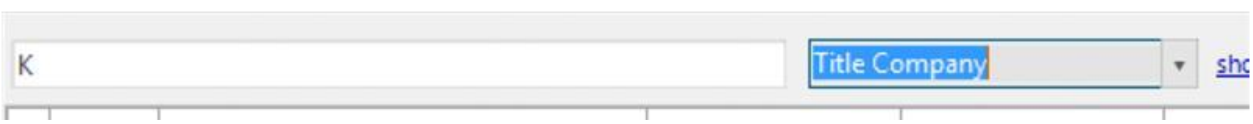
CLICK HERE TO OPEN THE REQUEST FORM

Go to AffiliatedAdmin.com > All Things Admin > System Library



Before submitting the request: Search for the lender, attorney, title company, co-borke & co-broke agent. When you're searching you cannot use symbols.

Example: K&M Title
Search under Title, "K" then scroll through to find.



K | Title Company | show advanced filter options

ID	person name	type	company	office	
117321	JANGMAN PARK	Title Company			2150 E
474475	JAY K FILLER	Title Company			
117351	Jay K Filler, Jr. P. C.	Title Company			3901 N.
497216	Jay K. Filler, Jr. P.C.	Title Company			3901 No
474480	JENNIFER KIRBY FINCHER PLLC	Title Company			
377034	JOHN F KLUnk	Title Company			
389850	Judith Graff (KNIGHT BARRY TITLE)	Title Company			
653415	K & M Title	Title Company			
250821	K&J	Title Company			
287320	K&J TITLE	Title Company			142 W 1
653463	K&M Title, LLC	Title Company	Affiliated	Kenosha	11300 7