

Darwin Manual Revised 11.19.2019

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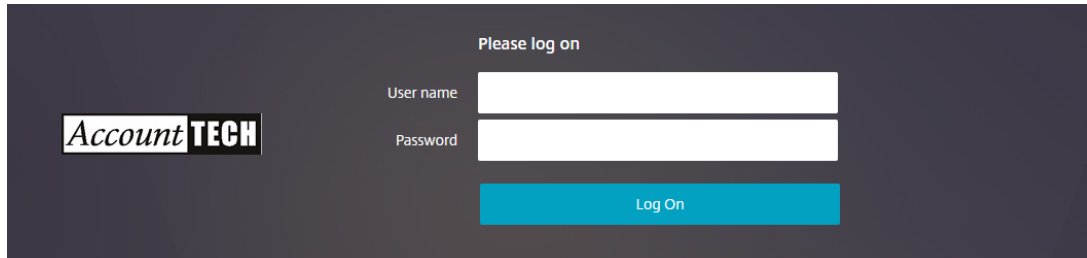
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Accessing Darwin

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.



The image shows a Citrix login interface with a dark background. On the left is the AccountTECH logo. On the right, under the heading "Please log on", there are two white input fields labeled "User name" and "Password". Below these fields is a blue button labeled "Log On".

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.



Below the logo is a navigation bar with "All" (highlighted with a blue underline) and "Categories".

Under the "All" tab, the section is titled "All Apps". It contains four app tiles, each with an icon, a title, a "Details" link, and a description:

- darwin Affiliated**: The icon is a blue circle with a white plant-like symbol. The title "darwin Affiliated" is circled in red.
- Darwin API documentation ver 1 manual**: The icon is a blue book with a white plant-like symbol.
- Darwin Campaign Designer Web Sites**: The icon is a yellow envelope with a white plant-like symbol.
- Darwin manual ver 5 manual**: The icon is a blue book with a white plant-like symbol.

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.

The screenshot shows the Darwin application interface. The top navigation bar includes Dashboard, Properties, People, Sales, Payables, Ledger, Banking, Reports, setup >>, Formulas, Dropdowns, Company, Settings, Security, and Close. The left sidebar has Property Basics, Features, Agents, People, Escrow, and Commission. The main area is the Property Basics search form. It includes fields for address (221 W Beltline), status (dropdown), company (Affiliated), filter by date (dropdown), property type (dropdown), accounting code, mls, from date, to date, buyer name, seller name, escrow #, qa control 1, broker ref #, and qa control 2. A table at the bottom shows search results with columns: propld, address, status, mls, listing date, pending date, list agent, sell agent, list office, and se. The first row shows propld 45587, address 221 W Beltline Highway, Madison, WI, 53713, status Pending, mls 123456, listing date 03/08/2019, pending date 03/14/2019, list agent Jason Fowler, and se Affilia.

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**.

The screenshot shows the Darwin application interface. The top navigation bar is the same as the previous screenshot. The left sidebar has Property Basics, Features, Agents, People, Escrow, and Commission. The main area is the Property Basics search form. The 'new' button is highlighted in the top left corner of the search form.

The screenshot shows the 'add new property' form in the Darwin application. The form includes fields for company (Affiliated), type code (Residential (R)), status (Active), accounting code (RESIDENTIAL SALE), mls (123456), property type (Single Family Attached), list date (10/23/2019), income type, expire date, street # (123), dir (S), street name (Test), street designation (Drive), suffix, suite apt number, bldg floor num, city (Madison), state (WI), and zip (53713). There are 'save' and 'cancel' buttons at the bottom.

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.

Property Basics

property address 123 Test Street, Madison, WI, 53713

Agents

People

Escrow

Commission

Agent Net List

Agent Net Sell

Post

Custom fields

Submission

list agent Carey Pierson

search

cancel

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.

Agents

add listing agent

agent Heather Dottauer

percent of award 50.00 %

selling price \$98,000.00

comm price \$98,000.00

total list commission 3.00 \$2,940.00

total list referral 0.00 \$0.00

adjusted list commission \$2,940.00

percent of adjusted gross 0.00 % OR amount \$ 0.00

save

cancel

listing agent

listing agent	regional	gross
1 Carey Pierson	regional: 50.00%	gross: 100.00%
2 Heather Dottauer	regional: 50.00%	gross: \$0.00

Adding List Price

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

The screenshot shows the 'Property Basics' form in the Darwin software. The 'asking price' field is highlighted with a black arrow. The form includes the following fields and values:

- property address: 123 Test Street, Madison, WI, 53713
- street #: 123, dir: Test, street name: Street, designation: Street, suffix:
- suite/apt: , build floor #:
- city: Madison, state: WI, zip: 53713
- status: Pending, status locked: ☐
- list date: 7/1/2019, expire date: 7/1/2020, exp date calculated: ☐
- withdrawn:
- asking price: \$100,000.00 (highlighted with a black arrow)
- selling price: \$98,000.00
- comm price: \$98,000.00
- pending date: 8/26/2019, est close date: 9/26/2019
- cancel date: , cancel reason:
- neighborhood: , sub division: , location: , transport:
- building area: , lot size: , total acre: , year built:

Adding a Seller

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

The screenshot shows the 'People' section in the Darwin software. The 'seller' field is highlighted with a red circle, and a green plus icon is visible next to it. The form includes the following fields and values:

- seller: (highlighted with a red circle)
- for multiple sellers, select survey recipient: survey, english survey:

The screenshot shows the 'Add person' form in the Darwin software. The form is divided into three steps:

- step 1: add person and/or company
 - first name: Opal, last name: Mick
 - company name:
- step 2: select a person type
 - person type: Buyer/Seller
- step 3: select an office
 - company: (optional)
 - office: (optional)
 - account: (optional)

The 'add' button is highlighted with a black arrow.

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

Edit Seller Information

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

The screenshot shows the Darwin software interface. The top navigation bar includes 'Dashboard', 'Properties', 'People', 'Sales', 'Payables', 'Ledger', 'Banking', 'Reports', 'setup >>', 'Formulas', and 'Dropdowns'. The 'People' tab is selected. Below the navigation bar, there are icons for search, new, save, cancel, submit, delete, print, letters, and copy. The 'Agents' section shows a list with 'Opal Mick' highlighted by a red circle. Below this, there is a 'no referral' entry.

This step will move you to the People Tab

The screenshot shows the Darwin software interface with the 'People' tab selected in the top navigation bar. The 'People' tab is circled in red.

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.

The screenshot shows the Darwin software interface with the 'People Basics' form for 'Opal Mick' (Person ID: 438631). The form includes fields for first, middle, and last names, company name, familiar name, corporate name, email address, and addresses. The 'phone numbers' section is highlighted with a red circle, and a 'phone number' dialog box is open, showing fields for phone type, phone number, and phone extension. The 'phone number' field contains '(555) 555-5555'.

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.

Property Basics

property address: 123 Test Street, Madison, WI, 53713

street #: 123 dir: Test street name: Test designation: Street suffix:

suite/apt: build floor #: city: Madison state: WI zip: 53713

status: Active ☐ status locked

list date: 7/1/2019

expire date: 7/1/2020 ☐ exp date calculated

withdrawn:

asking price: \$100,000.00

selling price: \$98,000.00

comm price: \$98,000.00

list agent: Carey Pierson

sell agent:

cancel date:

cancel reason:

type code: Residential

accounting code: RESIDENTIAL SALE

property type: Single Family Detached (R)

income type:

property style:

property use:

development:

neighborhood:

sub division:

location:

transport:

building area:

lot size:

total acre:

year built:

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

Property Basics

property address: 123 Test Street, Madison, WI, 53713

street #: 123 dir: Test street name: Test designation: Street suffix:

suite/apt: build floor #: city: Madison state: WI zip: 53713

status: Pending ☐ status locked

list date: 7/1/2019

expire date: 7/1/2020 ☐ exp date calculated

withdrawn:

asking price:

selling price:

comm price: \$98,000.00

list agent:

sell agent:

cancel date:

cancel reason:

type code: Residential

accounting code: RESIDENTIAL

property type: Single Family

income type:

property style:

property use:

development:

neighborhood:

sub division:

location:

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.

link Vendors to this transaction

ID	person name	type	company	office
146117	SECURITY FIRST TITLE	Title Company		
181468	FIRST SECURITY MORTGAGE SERVICES	Lender		
232260	National Security Mfg/Venue	Lender		
382103	National Security Mfg/Venue	Lender		
174764	RODGE SECURITY TITLE	Title Company		
56571	SECURITY BANK	Lender		
42733	Security Financial	Lender		
158821	Security First	Title Company		
412687	Security First Title	Title Company		
4788	SECURITY FIRST TITLE CO	Title Company	205 W S	
288436	SECURITY FIRST TITLE CO	Title Company		
188234	Security First Title Co	Title Company	11400 H	
131237	Security First Title Co	Title Company		
315875	Security First Title Company	Title Company	185 Bu	
182097	SECURITY MORTGAGE CORP	Lender		
244246	SECURITY NATIONAL	Lender		

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.

link Vendors to this transaction

ID	person name	type	company	off
99538	CROSSCOUNTRY MORTGAGE	Lender		
127320	Crosscountry Mortgage	Lender		
246611	CROSSCOUNTRY MORTGAGE, Inc.	Lender		

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**

The screenshot shows the Darwin software interface. The top navigation bar includes tabs like Dashboard, Properties, People, Sales, Payables, Ledger, Banking, Reports, setup>>, Formulas, Dropdowns, Company, Settings, Security, and Close. The left sidebar has a 'Commission' tab selected. The main area shows 'commission settings' with fields for selling price, comm price, listing commission, less referral, adjusted list commission, and trans fee. There are also sections for 'adjusted list commission' and 'cobroke commission'. The 'cobroke commission' section has a green plus icon circled in red, indicating where to click to add a co-broke office.

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.**

The screenshot shows the 'add sell cobroke' form. It has two input fields: 'cobroke office' and 'cobroke agent'. Both fields have a magnifying glass icon to the right. The 'cobroke office' magnifying glass icon is circled in red.

Search for a CoBroke office

Keller Williams CoBroke Office [show advanced filter options](#)

ID	person name	type	company	office
393084	Keller Williams Premiere Properties	CoBroke Office		
173324	Keller Williams New Tampa	CoBroke Office		
188101	Beth An Schulz-Keller Williams	CoBroke Office		
188747	Jenny Swain-Keller Williams	CoBroke Office		
188750	Jim Lampe-Keller Williams	CoBroke Office		
188761	Kara Thomas-Keller Williams	CoBroke Office		
173326	Keller Williams	CoBroke Office		
162108	Keller Williams	CoBroke Office		
163912	KELLER WILLIAMS	CoBroke Office		70005 N
140288	Keller Williams	CoBroke Office		

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.

The screenshot shows the Darwin software interface. The top navigation bar includes icons for Dashboard, Properties, People, Sales, Payables, Ledger, Banking, Reports, setup >>, Formulas, Dropdowns, Company, Settings, Security, and Close. The 'Property Basics' section is active, showing a search bar, a toolbar with icons for new, save, cancel, submit, delete, print, letters, copy, and add as a customer. The 'property address' field contains '123 N Test Street, Madison, WI, 53713'. The 'type code' dropdown is set to 'Residential'. The right side of the interface displays the property details: '123 N Test Street, Madison, WI, 53713', 'ID: 213120 / OL', and 'Company: Affiliated'.

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**.

The screenshot shows the Darwin software interface with the 'Property Basics' section active. The 'status' dropdown is set to 'Ready to Close'. The 'property address' field contains '123 N Test Street, Madison, WI, 53713'. The 'type code' dropdown is set to 'Residential'. The right side of the interface displays the property details: '123 N Test Street, Madison, WI, 53713', 'ID: 141951 / OL / Seller: AG Spher', and 'Company: Affiliated'. The 'status' dropdown is set to 'Ready to Close'. The 'list date' is '7/1/2019'. The 'expire date' is '7/1/2020'. The 'exp date calculated' is '7/1/2020'. The 'withdrawn' checkbox is checked. The 'pending date' is '8/26/2019'. The 'est close date' is '9/26/2019'. The 'cancel date' is empty. The 'building area' is empty.

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.

The screenshot shows the Darwin software dashboard. The 'Property Basics' section is selected in the left sidebar. The main area displays various icons for property management, including 'new', 'save', 'cancel', 'submit', 'delete', 'print', 'letters', 'copy', and 'add as a customer'. The 'new' icon is highlighted.

The screenshot shows the 'add new property' form. The fields are filled as follows:

- company: Affiliated
- type code: Residential (R)
- accounting code: RESIDENTIAL REFERRAL
- property type: Single Family Detached
- income type: Referral Income
- status: Open/Pending
- address: 9769 Wedgewood Circle, Woodbury, MN, 56125

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.

The screenshot shows the property details form. The fields are filled as follows:

- property address: 9769 Wedgewood Circle, Woodbury, MN, 56125
- type code: Residential
- accounting code: RESIDENTIAL REFERRAL
- property type: Single Family Detached (R)
- income type: Referral Income
- status: Open/Pending
- selling price: \$480,000.00
- pending date: 10/21/2019
- close date: 10/21/2019
- misc agent: Penny Olson (circled in red)

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.

The screenshot shows the Darwin software interface with the 'People' tab selected. A red circle highlights the green plus icon next to the 'seller' field, indicating where to click to add a new seller.

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.

The screenshot shows the profile for 'Opal Mick / Person ID: 438631'. The 'first', 'middle', and 'last' name fields are populated with 'Opal' and 'Mick'. The 'source' field is set to 'Sphere of Influence' and the 'lead by' field is set to 'Agent Generated'.

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

The screenshot shows the Darwin software interface with the 'People' tab selected. A red circle highlights the green plus icon next to the 'vendor / partner' field, indicating where to click to add a new vendor or partner.

CENTURY 21 Affiliated

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 screenshot shows the 'Commission' tab in the Darwin software. The 'cobroke commission' section is highlighted with a red circle, indicating where to click the green plus icon to add a new entry. The 'adjusted list commission' section shows a table with columns for 'list agent', '\$ list', '\$ %', and 'award %'. The 'cobroke commission' table has columns for 'cobroke name' and 'type'.

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

The screenshot shows the 'Commission' tab in the Darwin software. The 'Listing Commission' is set to 100.00, and the 'Payout' is set to \$4,560.00. The 'adjusted list commission' section shows a table with columns for 'list agent', '\$ list', '\$ %', and 'award %'. The 'cobroke commission' section is also visible.

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

The screenshot shows the 'Property Basics' tab in the Darwin software. The status is set to 'Ready to Close'. The 'property address' section shows the address '123 Test Street, Madison, WI, 53713'. The 'status' dropdown is set to 'Ready to Close'. The 'list date' is set to 7/1/2019, and the 'expire date' is set to 7/1/2020.

Rental Commission

Under PROPERTIES. Select New. Enter

The screenshot shows the Darwin software interface. The top navigation bar includes icons for Dashboard, Properties, People, Sales, Payables, Ledger, Banking, Reports, setup>>, Formulas, Dropdowns, Company, Settings, Security, and Close. Below the navigation bar is a toolbar with icons for search, new, save, cancel, submit, delete, print, letters, copy, and add as a customer. The 'add new property' form is visible, with fields for company (Affiliated), type code (Residential (R)), status (Active), accounting code (RESIDENTIAL RENTAL), mls (123456), property type (Single Family Detached), list date (10/23/2019), income type, address (123 NE Test Rental Street, Madison, WI 53713), and zip (53713).

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:

The screenshot shows the Darwin software interface with the Properties tab selected. The Properties tab is highlighted with a red circle. The Properties tab includes a search icon and a list of properties.

Adding List Agent

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

The screenshot shows the Darwin software interface with the 'add new property' form. The form includes fields for company (Affiliated), type code (Residential (R)), status (Active), accounting code (RESIDENTIAL RENTAL), mls (123456), property type (Single Family Detached), list date (10/23/2019), income type, address (123 NE Test Rental Street, Madison, WI 53713), and zip (53713). The 'List Agent' field is highlighted with a red circle, and the 'Add as a customer' button is visible.

Adding Rental Asking Price

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

The screenshot shows the 'Property Basics' form in the Darwin software. The form is divided into several sections: 'property address', 'street #', 'suite/apt', 'city', 'state', 'zip', 'status', 'list date', 'asking price', 'selling price', 'comm price', 'type code', 'accounting code', 'property type', 'income type', 'property style', 'property use', 'development', 'neighborhood', 'sub division', and 'location'. The 'Asking Price' field is highlighted in blue.

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.

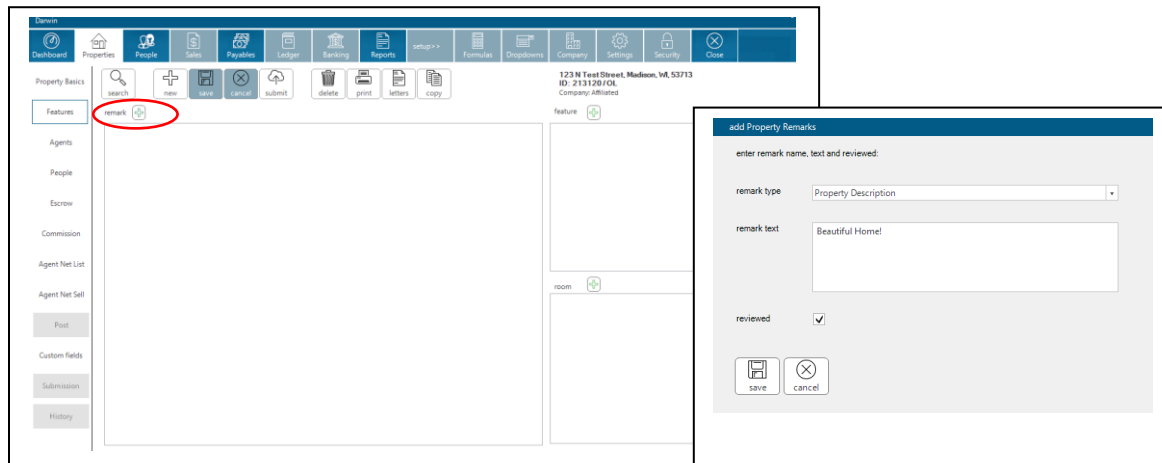
Adding Bed, Bath & Square Footage (Building Area) Details

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)

The screenshot shows the 'Property Basics' form in the Darwin software. The form is divided into several sections: 'property address', 'street #', 'suite/apt', 'city', 'state', 'zip', 'status', 'list date', 'asking price', 'selling price', 'comm price', 'type code', 'accounting code', 'property type', 'income type', 'property style', 'property use', 'development', 'neighborhood', 'sub division', 'location', 'transport', 'building area', 'total acre', 'lot size', 'year built', 'levels', 'full baths', '1/2 baths', 'beds', '3/4 baths', '1/4 baths', 'last sold', 'tax year', 'annual tax', 'tax roll #', 'exclude from', 'basis list', 'basis sell', 'submission', 'duplicate record', 'internet', 'less on internet', 'g price on web', 'e', 'Submission', and 'History'. The 'Building Area' field is highlighted in blue.

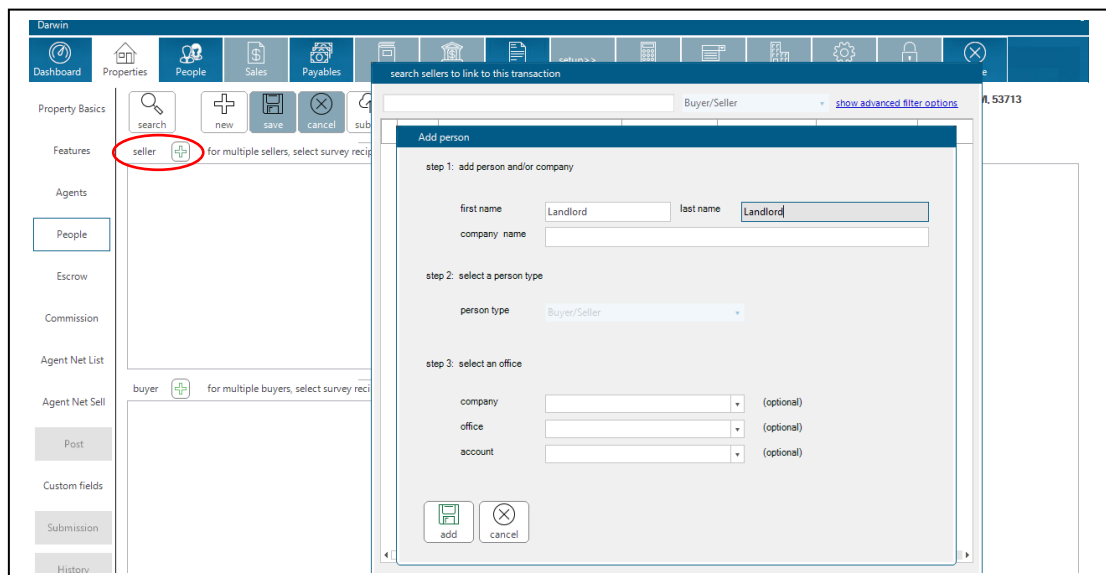
Adding Comments/Remarks

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.

The screenshot shows the Darwin software interface. On the left, the 'People' tab is selected. In the 'Agent Net List', the 'buyer' button is circled in red. A dialog box titled 'Add person' is open, showing the following steps:

- step 1: add person and/or company
 - first name: Tenant
 - last name: Tenant
 - company name:
- step 2: select a person type
 - person type: Buyer/Seller
- step 3: select an office
 - company: (optional)
 - office: (optional)
 - account: (optional)

At the bottom of the dialog box are 'add' and 'cancel' buttons.

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.

The screenshot shows the Darwin software interface. On the left, the 'People' tab is selected. In the 'Agent Net List', the 'vendor / partner' button is circled in red. A dialog box titled 'add other people / vendors involved in this sale' is open, showing the following fields:

- select person and side Vendor/Partner:
 - person:
 - role:
 - side:

At the bottom of the dialog box are 'save' and 'cancel' buttons. A search results table is also visible, showing the following data:

ID	person name	type	company	office
180831	NONE-RENTAL	Title Company		
385094	NONRENTAL	Lender		
393442	RENTAL	Lender		
441312	RENTAL	Title Company		
450236	RENTAL	Lender		
456471	RENTAL	Lender		
321571	RENTAL	Title Company		
204297	RENTAL	Loan Officer		

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.

The screenshot shows the Darwin software interface. The top navigation bar includes tabs for Dashboard, Properties, People, Sales, Payables, Ledger, Banking, Reports, and more. The 'Properties' tab is active, and the 'People' section is selected in the left sidebar. A red circle highlights the 'vendor / partner' button with a green plus icon. A modal window titled 'add other people / vendors involved in this sale' is open, showing fields for 'person', 'role', and 'side'.

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%.

The screenshot shows the Darwin software interface. The 'Properties' tab is active, and the 'Commission' section is selected in the left sidebar. The 'commission settings' table shows income of \$480,000.00 and payout of \$4,560.00. The 'adjusted list commission' table shows a list agent 'Jenny Olson' with a list price of \$4,560.00, a 100% award, and a 100% commission.

list agent	\$ list	\$ %	award %
Jenny Olson	\$4,560.00	100.00	100.00

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 accidentally, you must withdraw it.

The screenshot shows the Darwin software interface. The top navigation bar includes tabs for Dashboard, Properties, People, Sales, Payables, Ledger, Banking, Reports, setup >>, Formulas, Dropdowns, Company, Settings, Security, and Close. The left sidebar has a search icon and buttons for new, save, cancel, submit, delete, print, letters, and copy. The main form is titled 'Property Basics' and contains fields for property address, street #, dir, street name, designation, suffix, suite/apt, city, state, zip, build floor #, status (Cancelled), mls (123456-CA), asking price (\$100,000.00), selling price (\$98,000.00), comm price (\$98,000.00), list agent (Carey Pierson), and cancel date (9/16/2019). The cancel reason is 'Mutual Agreement'. A modal window titled 'Property info' is open, asking 'Reactivate listing?' with 'yes' and 'no' buttons.

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.

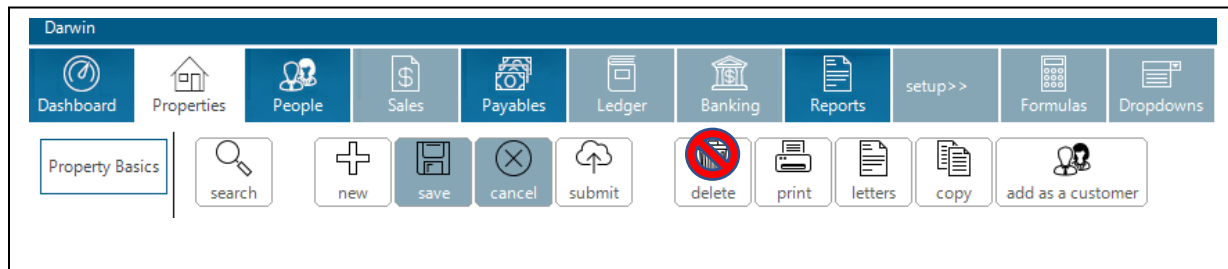
The screenshot shows the Darwin software interface. The top navigation bar includes tabs for Dashboard, Properties, People, Sales, Payables, Ledger, Banking, Reports, setup >>, Formulas, Dropdowns, Company, Settings, Security, and Close. The left sidebar has a search icon and buttons for new, save, cancel, submit, delete, print, letters, and copy. The main form is titled 'Property Basics' and contains fields for property address, street #, dir, street name, designation, suffix, suite/apt, city, state, zip, build floor #, status (Withdrawn), mls (123456-WD), asking price (\$0.00), selling price (\$0.00), comm price (\$0.00), list agent (Carey Pierson), and withdraw date (10/23/2019). A calendar is open showing the date selection.

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

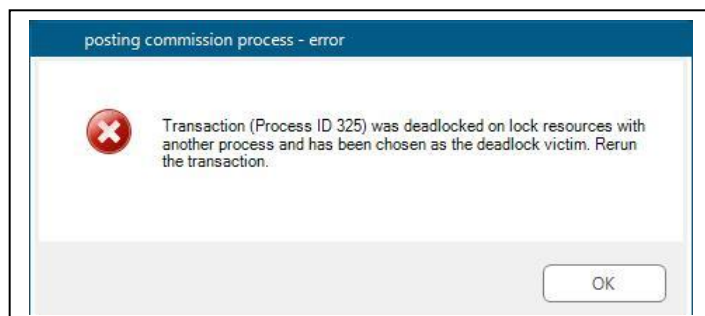
An orphan record in Dash creates a duplicate in Dash. Once you delete in Darwin the link between Dash and Darwin is broke. It leaves a listing without a home. This will cause issues with reporting and agent recognition.

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

The screenshot shows the Darwin software interface. In the left sidebar, the 'Escrow' option is selected. In the top toolbar, the 'deposit' button is highlighted with a red circle, and the 'check' button is crossed out with a red X. The main area displays a table for 'Property escrow checks' with columns for id, payee, date, check #, and account. A 'Total' row is visible.

Select the **Bank Account** from drop-down. Enter the **Check Number Rec'd** 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**.

The screenshot shows the 'add an escrow deposit' form. Fields include: bank account (1-9901 - BMO Harris Trust Account), check number (123), date (10/18/2019), amount (\$1,000.00), and escrow payee (Kathy Grove). A magnifying glass icon is next to the escrow payee field. At the bottom, there are 'post' and 'cancel' buttons.

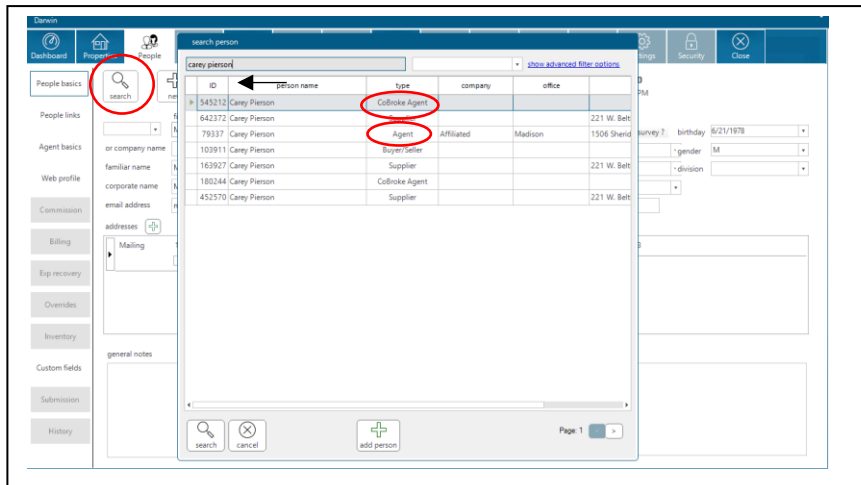
The screenshot shows the 'Add person' form. Step 1: add person and/or company. Fields include first name (Kathy), last name (Grove), and company name. Step 2: select a person type. Field includes person type (Buyer/Seller). Step 3: select an office. Fields include company, office, and account, each with an optional dropdown. At the bottom, there are 'add' and 'cancel' buttons.

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

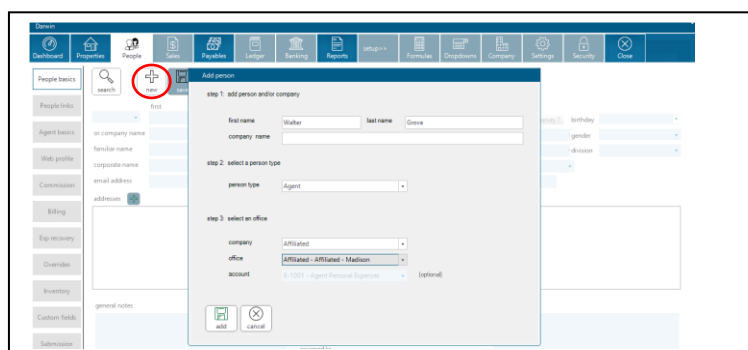
Agents can be added to Darwin after the Affiliated email confirmation from the IT Department has been received.

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).

The screenshot shows the 'Agent basics' section in the Darwin software. The 'start date' and 'anniversary date' fields are both set to 8/1/2019. The 'active' checkbox is checked. The 'licenses' section has a plus icon next to it.

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.

The screenshot shows the 'Agent basics' section in the Darwin software. The 'licenses' section has a plus icon next to it, which is circled in red. A pop-up window titled 'license' is open, showing steps to add a license: step 1: select license type (Sales Associate), step 2: select the state (WI), step 3: enter the start and expiration dates (issued date 3/1/2019, expiration date 12/14/2020), step 4: enter the license number (84-12345).

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.

The screenshot shows the 'Agent basics' section in the Darwin software. The 'positions' section has a plus icon next to it, which is circled in red. A pop-up window titled 'position' is open, showing steps to add a position: step 1: select a position (Associate Broker), step 3: enter the start date for this position (start date field), step 4: is full time (checkbox).

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.

The screenshot shows the Darwin system interface for a user named Carey Pierson (Person ID: 79337). The 'Web profile' tab is selected. On the right side, there are two sections: 'languages' and 'designations'. Both sections have a plus icon next to them, which is circled in red. The 'languages' section is currently empty, and the 'designations' section shows a list of designations with a plus icon next to the first one.

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.

The screenshot shows the Darwin system interface for a user named Walter Grove (CENTURY 21 Affiliated) (Person ID: 438461). The 'People links' section is selected. In the 'Custom fields' section, there is a field labeled 'MLS ID' with a plus icon next to it, which is circled in red. The 'MLS ID' field is currently empty.

The screenshot shows the 'MLS IDs' dialog box. It has two steps: 'step 1: select MLS source' and 'step 2: enter MLS ID'. The 'step 1' dropdown menu is currently empty. The 'step 2' text input field is also empty. There are 'save' and 'cancel' buttons at the bottom.

Verify Agent Defaults

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

The screenshot shows the Darwin system interface for a user named Walter Grove (CENTURY 21 Affiliated) (Person ID: 438461). The 'People links' section is selected. In the 'Agent basics' section, there are three checkboxes: 'gets 1099?', 'full time', and 'show on internet'. Arrows point to each of these checkboxes, indicating they should be selected. The '1099 type' dropdown menu is also visible.

Terminating an Agent

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

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

The screenshot shows the 'Agent basics' form in the Darwin software. The 'active' checkbox is unchecked, and the 'terminated' date is set to 9/16/2019. The 'start date' is 8/1/2019, and the 'anniversary date' is 8/1/2019. The 'anniv. start date' is 08/01/2019, and the 'anniv. end date' is 07/31/2020. The 'prior occupation' is blank, and the 'prior affiliation' is blank. The 'education level' is blank. The 'recruited by' field is blank, and the 'coached by' field is blank. The 'managed by' field is blank. The 'agent team' field is blank. The 'emergency contact' field is blank. The 'licenses' section shows 'Sales Associate' with the number 84-12345.

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

The screenshot shows the 'position' form in the Darwin software. The 'terminated date' is set to 9/16/2019. The 'start date' is 9/16/2019. The 'is full time' checkbox is unchecked. The 'save' button is highlighted. The 'position' section shows 'Sales Associate' as the selected position. The 'step 1: select a position' dropdown is set to 'Sales Associate'. The 'step 2: select an office' dropdown is set to 'Affiliated - Affiliated - Madison'. The 'step 3: enter the start date for this position' dropdown is set to '9/16/2019'. The 'step 4' section is empty.

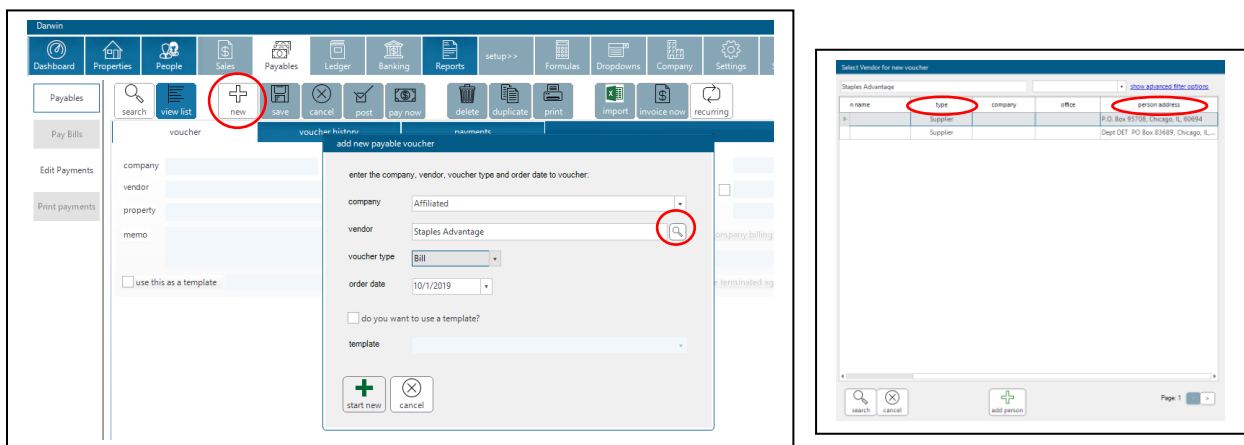
Payables

These steps you will be in the Payable tab



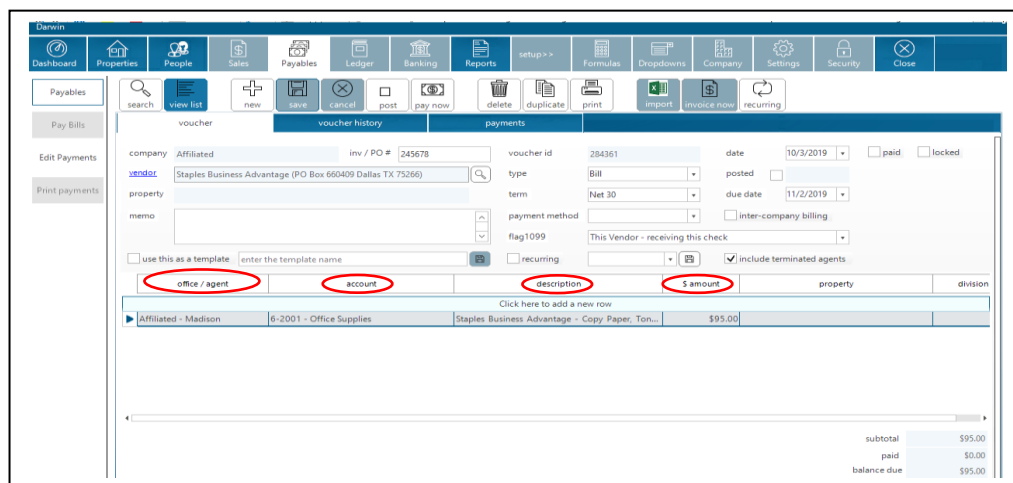
Adding a Payable

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

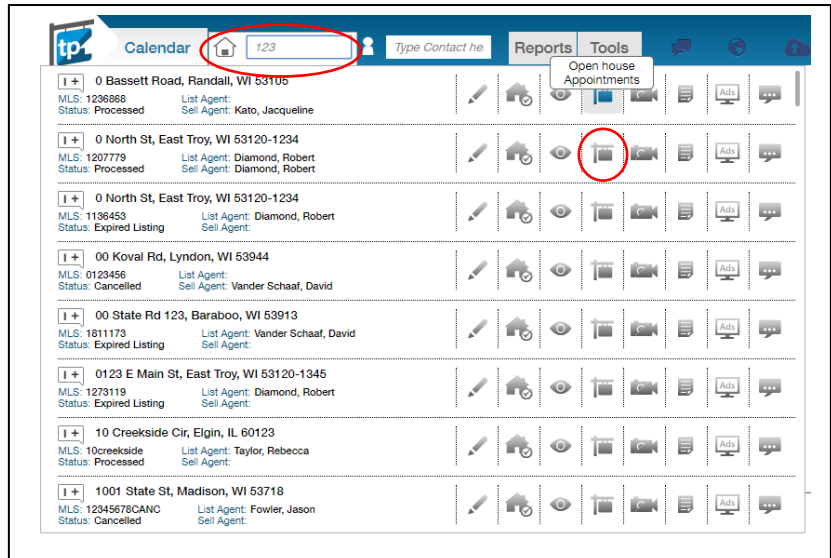
To access Transaction Plan log into <https://darwin.transactionplan.com/TP/1-all.shtml>

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

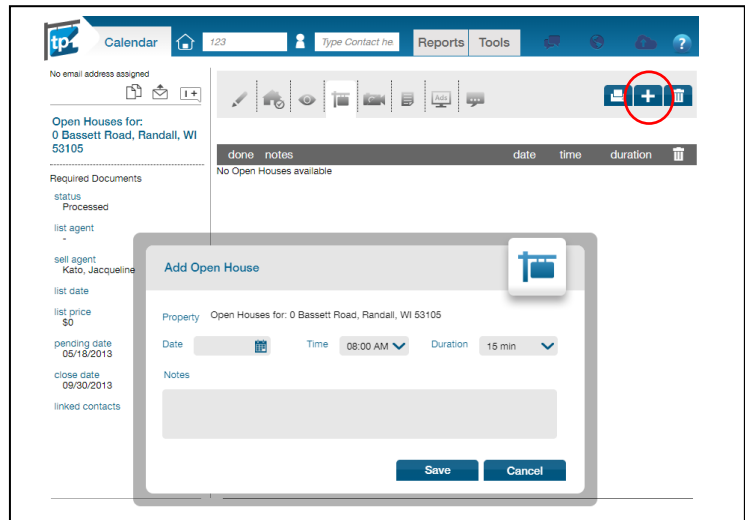
Enter the **Date** of the Open House

Enter the **Start Time**

Enter the **Duration**

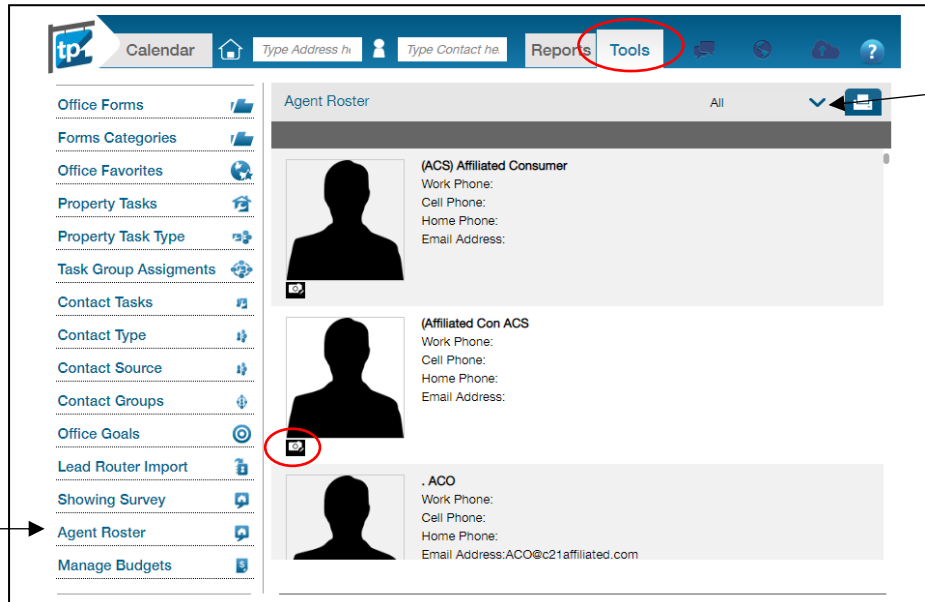
Add additional **notes** if applicable

Save



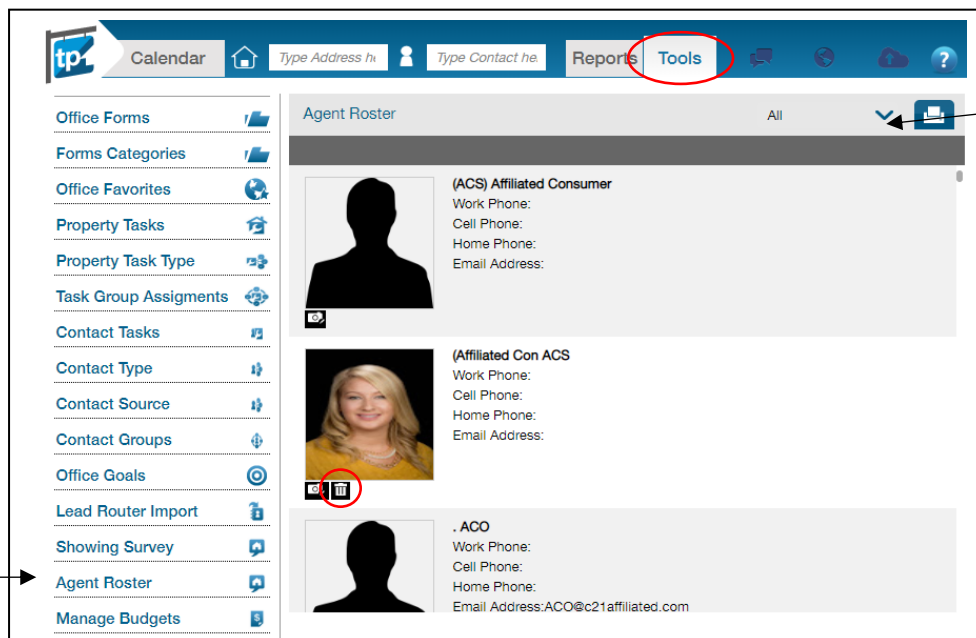
Agent Photo in Transaction Plan

To add an agent's 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

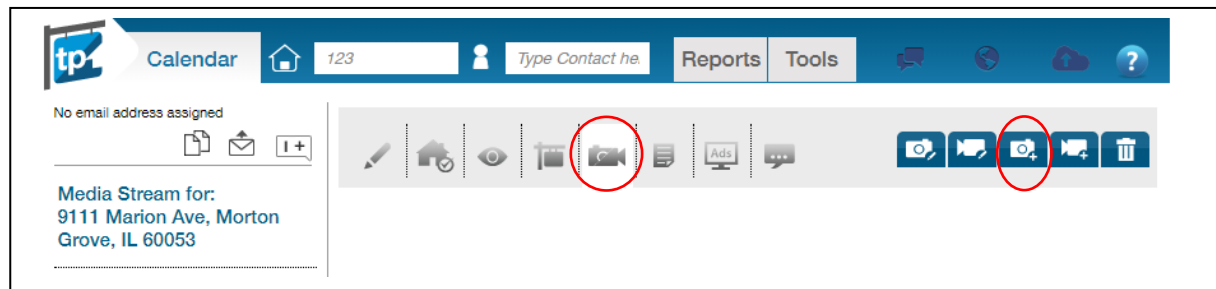
To remove an agent's photo in Transaction Plan, select **Tools**, then select **Agent Roster**. Scroll to find your agent. If you are in multiple office locations in Darwin, use the down arrow to filter your office selection. Select the trash can icon to delete the photo. Notify HelpDesk@c21affiliated.com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

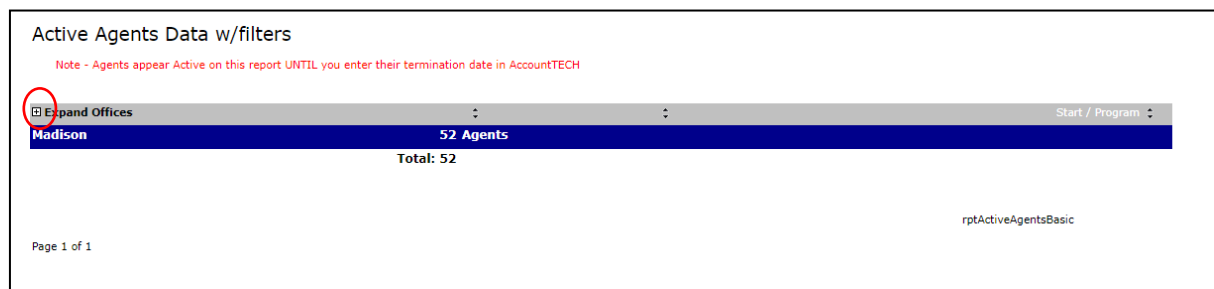


Transaction Plan Reporting

Reports: Agents

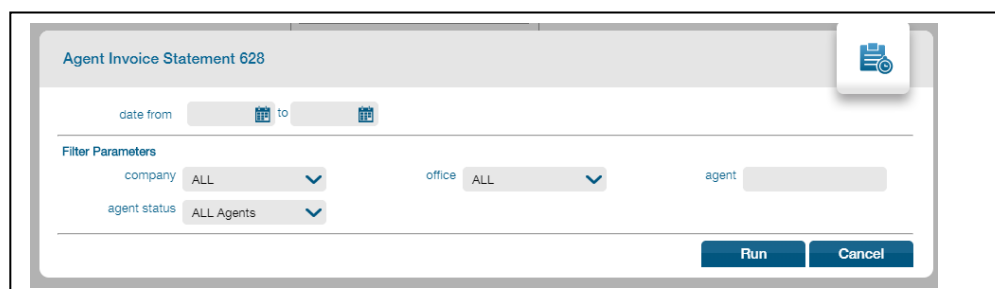
Active Agent data w/ filters (259)

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

Lender/Attorney/Title Request Form
Darwin Request form

* Required

1. Please Enter your Name *

Enter your answer

2. Please enter your office Name *

Enter your answer

3. Please select what you are requesting *

☐ Attorney

☐ Lender

☐ Title

Submit

Never give out your password. Report abuse

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