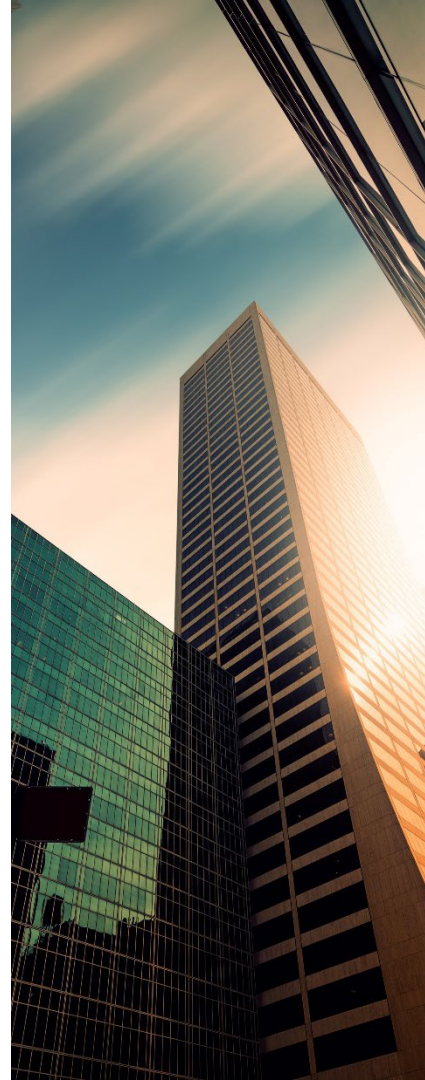


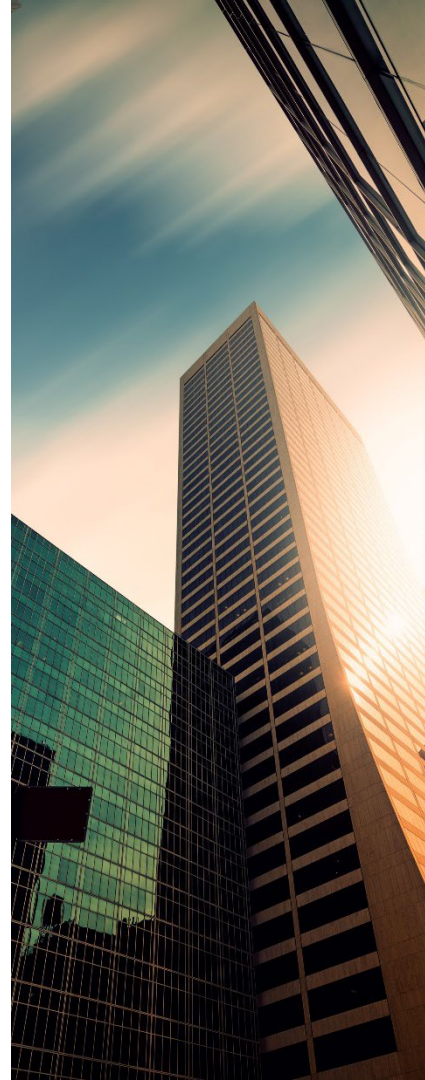


The Pipeline Process: From Beginning to End

For Agents



LEASES

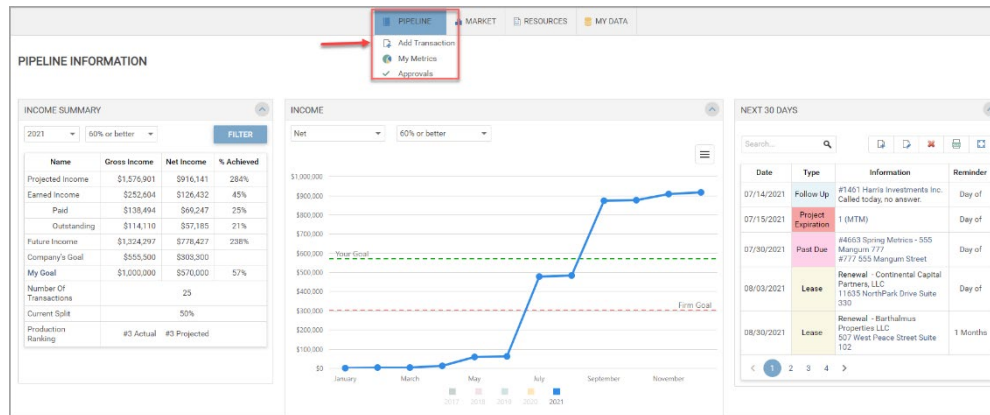


Starting a New Pipeline Transaction

A Pipeline Transaction can be created by selecting “Add Transaction” from the Main Menu drop down.

Add basic information for your deal. Put the basic details in for the transaction on the Basic Information page. The sections below are available when beginning a pipeline transaction.

- Client and Status
- Property or Location
- Parties
- Brokerage Firms
- Team
- Commissions
- Payments



Client & Status

- 1 Enter the name of your Client in the search bar. The clients you have already input will populate for you to choose from. Click on the client you want, or you can add it.
- 2 Using the dropdown, choose your representation. You can choose from Landlord, Tenant, Buyer, Seller, or Consulting. For this lease example we will choose "Landlord"
- 3 Use the dropdown to choose your Chance of Closing. You can always change this later on.

ADD A TRANSACTION

BASIC INFORMATION

CLIENT & STATUS

Choose a Client.*

1 555 Mangum - Landlord, LLC

2 Representation.* Landlord

3 Chance of Closing.* 50%

555 Mangum

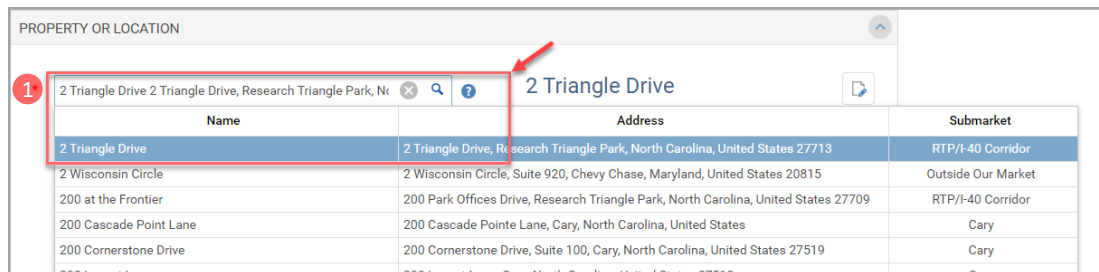
Landlord, LLC
3015 Carrington Mill Blvd., Suite 460
Morrisville, NC 27560

Jim Bobbins

Source: Cold Calling

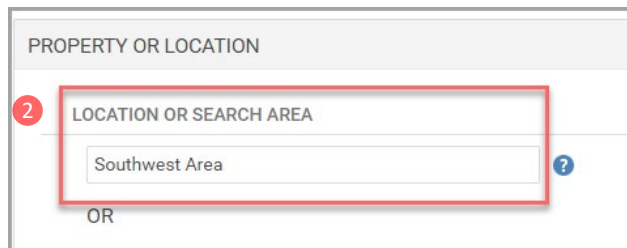
Property or Location

1 Choose your property by entering the name in the search bar. The properties that you have already input will populate for you to choose from. If your property is not in the list, you can add it.



Name	Address	Submarket
2 Triangle Drive	2 Triangle Drive, Research Triangle Park, North Carolina, United States 27713	RTP/I-40 Corridor
2 Wisconsin Circle	2 Wisconsin Circle, Suite 920, Chevy Chase, Maryland, United States 20815	Outside Our Market
200 at the Frontier	200 Park Offices Drive, Research Triangle Park, North Carolina, United States 27709	RTP/I-40 Corridor
200 Cascade Point Lane	200 Cascade Pointe Lane, Cary, North Carolina, United States	Cary
200 Cornerstone Drive	200 Cornerstone Drive, Suite 100, Cary, North Carolina, United States 27519	Cary

2 If you are doing a Tenant/Buyer representation and do not know the property yet, you can add a location instead.



PROPERTY OR LOCATION

2 LOCATION OR SEARCH AREA

Southwest Area

OR

Parties & Brokerage Firms

Parties

- 1 The appropriate parties will auto-fill from the information you input for the Client. You will be able to add the other party later when you have more details about the transaction.

Brokerage Firms

- 2 Your firm will show up automatically as Landlord Firm or Tenant Firm, depending on the representation type of the transaction. Outside firms can be added later when you have more details about the transaction.
- 3 You can also add Referring Firms in this section by selecting them in the search bar, but you will also have the opportunity to do this later when you have more details about the transaction.

PARTIES

LANDLORD TENANT

555 Mangum 1

Landlord, LLC
3015 Carrington Mill Blvd.
Suite 460
Morrisville, NC 27560

Bethany Hair
(123) 123-1243
bhair@realcoreapps.com

Source: Cold Calling

Choose an entity:

BROKERAGE FIRMS

LANDLORD FIRM TENANT FIRM REFERRING FIRMS 3

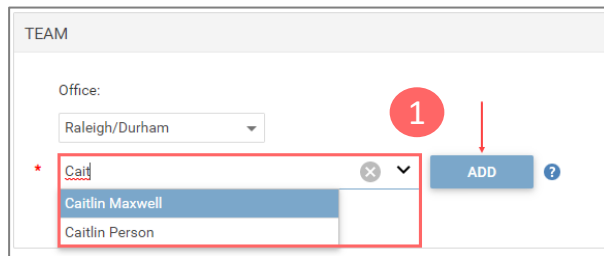
Avani Real Estate 2

Avani Real Estate
307 Fellowship Road
Suite 300
Mount Laurel, NC 27560

Team

- 1 The Team is referencing any Agents “in house” (within your company office or another branch location) that are on this deal. Search for the agent’s name in the bar and click "Add".
- 2 Update each agent’s share by double clicking in the percentage cell.
(TIP: This percentage is not your individual split with the company. This is the “off the top” split agreement.)
- 3 If the combination of agents and percentage splits are a common selection for you, you can save this as a Team. A pop-up will appear asking if you want to create a "team combination". Enter a team name and Save to add this Team to your list. Your team will populate in the chart below with each agent's commission percentage and their fee.

(TIP: Each Team created is specific to the user that creates it - meaning, no one else sees these Teams.)

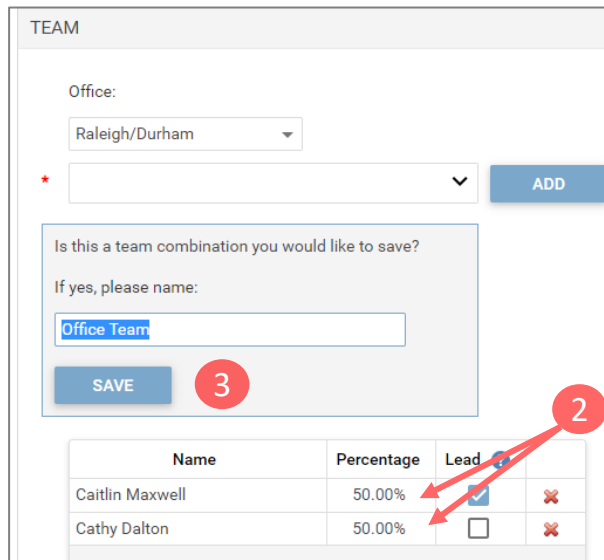


TEAM

Office:
Raleigh/Durham

* Caitl
Caitlin Maxwell
Caitlin Person

ADD ?



TEAM

Office:
Raleigh/Durham

*

ADD

Is this a team combination you would like to save?

If yes, please name:

Office Team

SAVE

Name	Percentage	Lead
Caitlin Maxwell	50.00%	☒
Cathy Dalton	50.00%	☐

Commissions

- 1 Select the Fee Type from the dropdown menu and enter the appropriate amount or percentage.

Enter the following information:

- 2 Term (Months)
- 3 Estimated \$/SF
- 4 Total SF
- 5 Transaction Value
- 6 Gross Commission
- 7 If some of the required information is unknown, you can use the Calculate button to fill in the missing information. However, you must have the minimum required pieces of information. Once you have entered the known information, click "Calculate".
- 8 Other details, such as Free Rent and TI Allowance may be stored in this section. In a pipeline transaction, these fields are not part of your commission calculation. You can add or edit this later when you have additional details.

COMMISSIONS

SELECT FEE TYPE

Fee* [Select] [Fee By %] [Fee By \$/SF] [Other]

ESTIMATED TRANSACTION CALC

Term (months)* [] Gross Commission*

COMMISSIONS

SELECT FEE TYPE

Fee* [Fee By %] [Total Fees* 6.00%]

ESTIMATED TRANSACTION CALCULATIONS

Term (months)* [60.00] Estimated \$/SF* [22.00] Year [] Total SF* [2,450.00] Transaction Value* [269,500.00] Gross Commission* [16,170.00] Additional Fee: [0.00]

CALCULATE

OTHER DETAILS

Free Rent (months): [0.00] TI Allowance (\$/sf): [0.00]

Payments

- 1 Add the number of payments expected in the box and then click "Generate".
- 2 A row will populate for each estimated pay date. You can always change these dates later.

PAYMENTS

1

Of Payments:*

2

GENERATE

?

#	Projected Date	% Of Fee	?
1	210/12/2021	50.00%	 
2	24/12/2022	50.00%	 

Saving the Basic Information of a Deal

- 1 If you do not close your own deals but have completed your portion of information for the deal, you can now check the "Ready For Closing" box. This box will notify your administrator that the deal is ready to have additional details added for closing. You do not need to check this box if you close your own transactions.

The screenshot shows a user interface for managing a deal. At the top, there is a header bar with a date field set to '4/12/2022' and a green notification banner that reads: 'This transaction will be set to 100% and the support team will be notified it is ready to be closed.' Below the header, there is a checkbox labeled 'Ready For Closing' which is checked. A red arrow points to this checkbox with a red circle containing the number '1'. Below the checkbox are three blue buttons: 'SAVE AND RETURN TO PIPELINE' (highlighted with a red box and labeled with a red circle '2'), 'SAVE AND VIEW SUMMARY' (labeled with a red circle '3'), and 'SAVE AND ADD ANOTHER TRANSACTION' (labeled with a red circle '4').

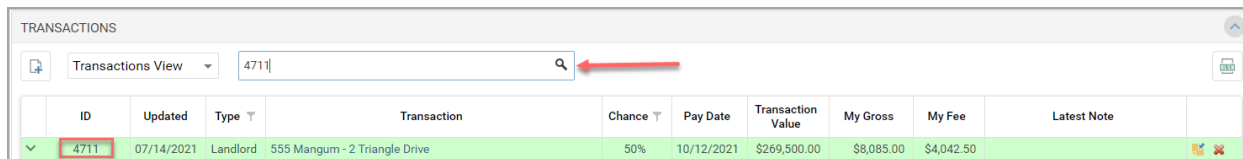
- 2 After you check the box, click the "Save and Return to Pipeline" button, which will take you back to Pipeline page.

You can also choose to:

- 3 Save and View Summary - Save your transaction and view the deal summary.
- 4 Save and Add Another Transaction - Save your current transaction and open a new screen to add another transaction.

Editing a Transaction

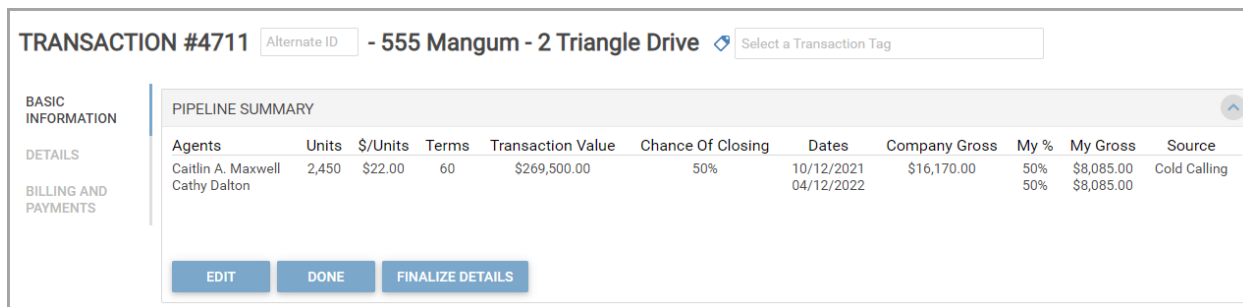
After adding a transaction to your pipeline, you will be able to see it on your Pipeline page. In the Transactions View, you can use the search box to search by deal number or other related information to the deal.



ID	Updated	Type	Transaction	Chance	Pay Date	Transaction Value	My Gross	My Fee	Latest Note
4711	07/14/2021	Landlord	555 Mangum - 2 Triangle Drive	50%	10/12/2021	\$269,500.00	\$8,085.00	\$4,042.50	

Click on the deal in the pipeline that you want to edit. This will bring you to the Pipeline Summary page.

(If your screen does not look like the image below, please go to Page 12.)



TRANSACTION #4711 - 555 Mangum - 2 Triangle Drive

BASIC INFORMATION

DETAILS

BILLING AND PAYMENTS

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Caitlin A. Maxwell	2,450	\$22.00	60	\$269,500.00	50%	10/12/2021	\$16,170.00	50%	\$8,085.00	Cold Calling
Cathy Dalton						04/12/2022		50%	\$8,085.00	

EDIT DONE FINALIZE DETAILS

Editing a Transaction

At the bottom of the Pipeline Summary, you will see three buttons.

- 1 Edit - The Edit button allows you to edit the Basic Information of the deal. This is only the information that you entered when first adding the transaction to your pipeline.
- 2 Done – The Done button simply returns you to your Pipeline page.
- 3 Finalize Details - The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For leases this includes things like official parties, the rent schedule, estimates, or other specific pertinent details. For sales this would include an executed contract, or if you want to add escrow or critical date information.

TRANSACTION #4711 Alternate ID - 555 Mangum - 2 Triangle Drive Select a Transaction Tag

BASIC INFORMATION

DETAILS

BILLING AND PAYMENTS

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Caitlin A. Maxwell Cathy Dalton	2,450	\$22.00	60	\$269,500.00	50%	10/12/2021 04/12/2022	\$16,170.00	50%	\$8,085.00 \$8,085.00	Cold Calling

1

2

3

EDIT

DONE

FINALIZE DETAILS

Note that not all firms require that agents Finalize Details. When adding these details, Realcore requires detailed information that can be changed later. Some firms only require agents to enter Basic Information. Check with your administration team if you are unsure.

Editing a Transaction

If you have already clicked the Finalize Details button before, you will be taken to the abstract page after clicking on your deal in the Pipeline. You can edit your transaction from the abstract page by clicking on the Edit icon in the upper right corner of the screen.

555 Mangum >> 2 Triangle Drive - 555 Mangum - Transaction #4711

Update Alternate ID

Edit Button on Abstract page

Add a Transaction Tag

PROPERTY



Tenant:
Transaction Trace

IMPORTANT DATES

Execution Date:
10/12/2021
Commencement Date:
04/12/2022
Expiration Date:
04/11/2027
Renewal Notice Date:
N/A
Renewal Notice Notes:
N/A
Term:
60
Security Deposit:
N/A
Termination Notice Date:
N/A
Termination Notice Notes:
N/A

ECONOMICS

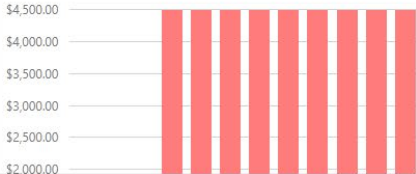
REPORTS

- Select a report -

MONTHLY RENT EXPENSES

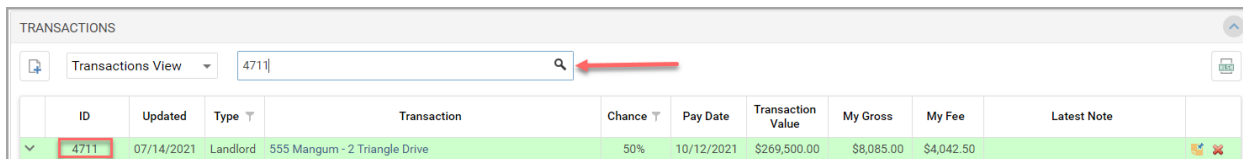
2022

FILTER



Finalizing the Details

- 1 Click on the deal in the pipeline that you want to add details. This will bring you to the Pipeline Summary page.

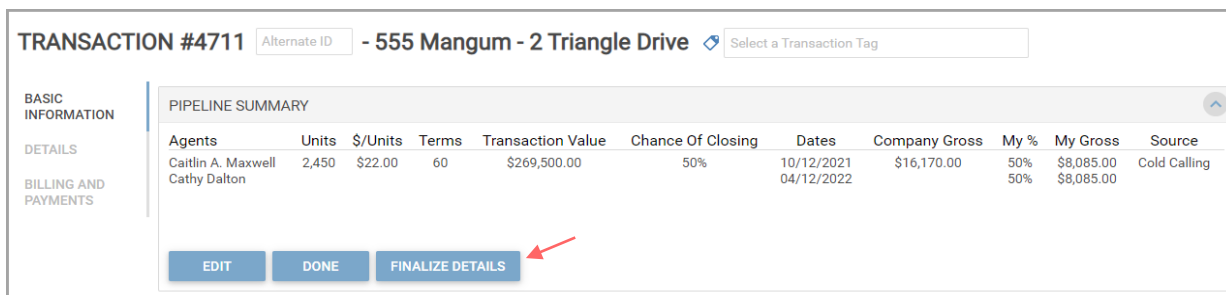


TRANSACTIONS

Transactions View 4711

ID	Updated	Type	Transaction	Chance	Pay Date	Transaction Value	My Gross	My Fee	Latest Note
4711	07/14/2021	Landlord	555 Mangum - 2 Triangle Drive	50%	10/12/2021	\$269,500.00	\$8,085.00	\$4,042.50	

- 2 The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For leases this includes things like official parties, the rent schedule, estimates, or other specific pertinent details. For sales this would include an executed contract, or if you want to add escrow or critical date information. Click the Finalize Details button when you have this information.



TRANSACTION #4711 Alternate ID - 555 Mangum - 2 Triangle Drive Select a Transaction Tag

BASIC INFORMATION

DETAILS

BILLING AND PAYMENTS

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Caitlin A. Maxwell	2,450	\$22.00	60	\$269,500.00	50%	10/12/2021	\$16,170.00	50%	\$8,085.00	Cold Calling
Cathy Dalton						04/12/2022		50%	\$8,085.00	

EDIT DONE FINALIZE DETAILS

Finalizing the Details

- 3 Confirm your Client, Representation type, and Chance of Closing are still accurate. You can edit the Client information by clicking on the edit icon to the right.

CLIENT & STATUS

Choose a Client.*

555 Mangum - Landlord, LLC

Representation.* Landlord

50%

555 Mangum

Landlord, LLC
3015 Carrington Mill Blvd.
Suite 460
Morrisville, NC 27560



- 4 Add or confirm the property. You can also add a Unit/Suite, or edit the property's details by clicking on the edit icon to the right.

PROPERTY OR LOCATION

* 2 Triangle Drive 2 Triangle Drive, Research Triangle Park, North C

Unit/Suite:

2 Triangle Drive

2 Triangle Drive
Research Triangle Park, NC 27713

Property Type:	MLS #:	Township:
Flex	N/A	N/A
Submarket:	Parcel #:	Zoning:
RTP/I-40 Corridor	N/A	N/A
Square Footage:	Assessed Value:	Other:
30,500	N/A	N/A
Vacant Square Footage:		
N/A		



Finalizing the Details

- 5 In the Parties section, your client is automatically listed for the appropriate party. Here you will need to add a tenant for a landlord transaction, or the landlord for a tenant transaction. In this example we have added a tenant

PARTIES

LANDLORD

555 Mangum

Landlord, LLC
3015 Carrington Mill Blvd.
Suite 460
Morrisville, NC 27560

TENANT

Terapeutico Traces

Terapeutico Traces
504 Main Street
Raleigh, NC 56875

- 6 Your firm is automatically listed for the appropriate representation in the Brokerage Firms section. Here you can add an outside firm and/or referring firm if applicable.

BROKERAGE FIRMS

LANDLORD FIRM

Avani Real Estate

Avani Real Estate
307 Fellowship Road
Suite 300
Mount Laurel, NC 27560

TENANT FIRM

Coastal Properties

Coastal Properties
6350 Ravenel Ct
Raleigh, NC 75684
(843) 564-5656

Nichole Johnson

REFERRING FIRMS

Name

All In Realty, LLC - Johnny Johnson

Finalizing the Details

- 7 The information in the Team and the Payments section is the same as it was when you initially entered the deal. You can change this information at any point before closing out the transaction.

When everything looks correct on the Basic Information page, click the Next button to proceed to the Details page.

TEAM

Office:
Raleigh/Durham

* ?

Name	Percentage	Lead ?	
Caitlin Maxwell	50.00%	☒	✕
Cathy Dalton	50.00%	☐	✕

PAYMENTS

Of Payments:* ?

#	Projected Date	% Of Fee ?	
1	10/12/2021 📅	50.00%	🔗 ✕
2	4/12/2022 📅	50.00%	🔗 ✕



Finalizing the Details

- 8 The Dates and Terms section of the Details page is where you will input specific details of the lease. The total square footage, term (in months), starting rate per SF, rent type, fee type, and total fees are all required information. Other information is optional and can be added and edited later.

When all the required information has been filled, you can click the “Create Rent Schedule” to generate a rent schedule based on the information in the Dates and Terms section.

DATES & TERMS

Total Square Footage*	2,450.00	
Term (months)*	60.00	
Starting Rate Per SF*	\$22.00	Year ▾
Escalation Rate:	0.00	% ▾
Rent Type*	Full Service	
Rental Abatement (Months):	0.00	Inside Term ▾
TI Allowance (\$/SF):	\$0.00	

Fee* Fee By % ▾

Total Fees* 6.00%

Execution Date: 10/12/2021

Commencement Date: 4/12/2022

Expiration Date: 4/11/2027

Security Deposit: \$0.00

Security Deposit Notes:

Renewal Notice: -Select- ▾

Renewal Notice Notes:

Termination Notice: -Select- ▾

Termination Notice Notes:

Realcore Generated ▾ [CREATE RENT SCHEDULE](#)

Finalizing the Details

- 9 The Realcore generated rent schedule will appear in the Rent Details section. This rent schedule was created using the information provided in the Dates and Terms section. You can edit each cell of the table by clicking directly in the cell to make your changes, and then clicking outside of the table when you're done. You can also add rows by using the Add icon in the upper right corner.

RENT DETAILS										
From Date	To Date	Term (Months)	Rate PSF (Annual)	Total Sq. Ft.	Rent Abatement	Rent/Mo	Rent/Period	Commission	Fee	
04/12/2022	04/11/2023	12	\$22.00	2,450	0	\$4,491.67	\$53,900.00	6.00%	\$3,234.00	✕
04/12/2023	04/11/2024	12	\$22.00	2,450	0	\$4,491.67	\$53,900.00	6.00%	\$3,234.00	✕
04/12/2024	04/11/2025	12	\$22.00	2,450	0	\$4,491.67	\$53,900.00	6.00%	\$3,234.00	✕
04/12/2025	04/11/2026	12	\$22.00	2,450	0	\$4,491.67	\$53,900.00	6.00%	\$3,234.00	✕
04/12/2026	04/11/2027	12	\$22.00	2,450	0	\$4,491.67	\$53,900.00	6.00%	\$3,234.00	✕
		60			0		\$269,500.00		\$16,170.00	

Finalizing the Details

- 10 The last section of the Details page is the Commission Review. This section will give you a breakdown of the transaction's fees. Be sure to change the percentages for each firm (if applicable). You can edit the Referring Firm's fees by clicking the edit icon and adding or changing the percentage or dollar amount. Click "Update" at the bottom of the Referring Firm box after making any changes.

When you have completed the Details page, click the Next button to go to the Billing and Payments page.

COMMISSION REVIEW

TOTAL TRANSACTION VALUE: \$269,500.00
FEE PERCENTAGE: 6.00%
COMMISSION DEDUCTIONS
ADDITIONAL FEE: \$0.00
FINAL FEE: \$16,170.00

LANDLORD FIRM
Avani Real Estate
FEE PERCENTAGE: 3.00%
TOTAL FEE: \$7,276.50

TENANT FIRM
Coastal Properties
FEE PERCENTAGE: 3.00%
TOTAL FEE: \$8,085.00
BILL SEPARATELY: ☐

REFERRING FIRM: \$808.50
Companies

Name	Fee	
All in Realty, LLC - Johnny Johnson	10.00%	 

10.00%
OR
\$0.00

Notes:

Update Cancel

BACK NEXT

Finalizing the Details

- 11 The Billing and Payments page is the last step for completing your transaction. Confirm that the billing contact is correct, as well as projected dates for payment. If everything looks good, then your transaction is complete.

If you are ready to close the transaction, click the box next to "Ready For Closing". This will notify your administration team that the transaction is ready to be processed.

If you are not ready to close, simply click the "Done" button at the bottom of the page to return to your pipeline. Want to make edits later? Review the steps for [Editing a Transaction](#).

BILLING & PAYMENTS

Choose Billing*

1542 - 555 Mangum - Bethany Hair

CURRENT BILLING CONTACT

555 Mangum

3015 Carrington Mill Blvd.
Suite 460
Morrisville, NC 27560

MODIFY PAYMENTS

OVERVIEW

TOTAL FEE: \$16,170.00

OUTSIDE FIRM FEE: \$8,085.00

FEE PERCENTAGE: 6.00%

REFERRING FIRM FEE: \$808.50

INTERNAL FEE: \$7,276.50

☐ Ready For Closing

Drag a row to change the order of the payments.

Search...

	#	% of Fee	Amount	Coastal Properties	Referring Firm	Our Firm	Invoice Sent	Projected	
☐	1	50.00%	\$8,085.00	\$4,042.50	\$404.25	\$3,638.25		10/12/2021	
☐	2	50.00%	\$8,085.00	\$4,042.50	\$404.25	\$3,638.25		04/12/2022	
		100.00%	\$16,170.00	\$8,085.00	\$808.50	\$7,276.50			

Page 1 of 1 (2 items) < 1 > Page size: 24

BACK

DONE

Dual Agency Deals

Starting the Transaction in Your Pipeline

When you are participating in a dual agency deal with different agents from the same firm on both sides, you will enter in your side of the deal into your pipeline by completing the Basic Information page only.

- 1 Add basic information for your side of deal. Put the basic details in for the transaction on the Basic Information page.
- 2 **Client and Status** - Choose your Client by entering the name in the search bar and selecting the appropriate client.
- 3 Using the dropdown, choose your Representation.
- 4 Use the dropdown to choose your Chance of Closing. You can always change this later.

The screenshot shows the 'ADD A TRANSACTION' form. At the top, there are fields for 'Alternate ID' and 'Select a Transaction Tag'. Below this, the form is divided into two main sections: 'BASIC INFORMATION' (indicated by a red callout 1) and 'CLIENT & STATUS' (indicated by a red callout 2). The 'CLIENT & STATUS' section contains a search bar labeled 'Choose a Client.*' with the text '555 Mangum - Landlord, LLC' entered. To the right of the search bar is a magnifying glass icon and a help icon. Below the search bar, there are two dropdown menus: 'Representation.*' with 'Landlord' selected (indicated by a red callout 3) and 'Chance of Closing.*' with '50%' selected (indicated by a red callout 4). To the right of these dropdowns is a help icon. Further to the right, the client details are displayed: '555 Mangum', 'Landlord, LLC', '3015 Carrington Mill Blvd., Suite 460', 'Morrisville, NC 27560', 'Jim Bobbins', and 'Source: Cold Calling'.

Dual Agency Deals

- 5 **Property or Location** - Choose your property by entering the name in the search bar. The properties that you have inputted will populate to choose from.
- 6 If you are doing a Tenant/Buyer representation and do not know the property yet, you can add a Location instead.

PROPERTY OR LOCATION 5

2 Triangle Drive 2 Triangle Drive, Research Triangle Park, Nc

2 Triangle Drive

Name	Address	Submarket
2 Triangle Drive	2 Triangle Drive, Research Triangle Park, North Carolina, United States 27713	RTP/I-40 Corridor
2 Wisconsin Circle	2 Wisconsin Circle, Suite 920, Chevy Chase, Maryland, United States 20815	Outside Our Market
200 at the Frontier	200 Park Offices Drive, Research Triangle Park, North Carolina, United States 27709	RTP/I-40 Corridor
200 Cascade Point Lane	200 Cascade Pointe Lane, Cary, North Carolina, United States	Cary
200 Cornerstone Drive	200 Cornerstone Drive, Suite 100, Cary, North Carolina, United States 27519	Cary

PROPERTY OR LOCATION 6

LOCATION OR SEARCH AREA

Southwest Area

OR

Dual Agency Deals

- 7 **Parties** - The appropriate parties will auto-fill from the information you input for the Client. You will be able to add the other party later when you have more details about the transaction.

PARTIES

LANDLORD

555 Mangum 7
Landlord, LLC
3015 Carrington Mill Blvd.
Suite 460
Morrisville, NC 27560

TENANT

Dual Agency Deals

- 8 **Brokerage Firms** - Your firm will show up automatically as Landlord/Seller Firm or Tenant/Buyer Firm, depending on what side of the deal you are on for this type of the transaction. For the beginning stages of the transaction, you will not add your firm to the other side of the deal. Leave this blank.
- 9 You can add Referring Firms in this section by selecting them in the search bar, but you can also do this later on.

BROKERAGE FIRMS

LANDLORD FIRM	TENANT FIRM	REFERRING FIRMS
8 Avani Real Estate Avani Real Estate 307 Fellowship Road Suite 300 Mount Laurel, NC 27560	9 Even though you know you will be doing a Dual Agency deal, leave the other firm blank.	

Dual Agency Deals

- 10 Team** - Enter your team in the Team section. The Team is referencing any agents “in house” (within your company office, or even another branch location) that are participating on this side of deal. *You will not include any agent(s) on the other side of the deal in this section. The agent(s) listed here are only on your side of the deal.*

TEAM

Office:

Raleigh/Durham

*

ADD

?

Name	Percentage	Lead ?	
Caitlin Maxwell	100.00%	☒	☐

You will not include any agent(s) on the other side of the deal in this section. The agent(s) listed here are only on your side of the deal.

Dual Agency Deals

11 Commissions - This section allows you to select the Fee Type from the dropdown menu, and to input numbers for the Estimated Transaction Calculations. Here you will enter:

- a) Term (months)
- b) Estimated \$/SF
- c) Total SF
- d) Transaction Value
- e) Gross Commission

COMMISSIONS

SELECT FEE TYPE

Fee.* Fee By %
Total Fees.* 6.00%

ESTIMATED TRANSACTION CALCULATIONS

a Term (months).* 60.00
b Estimated \$/SF.* \$25.00 Year
c Total SF.* 3,600.00
d Transaction Value.* \$450,000.00

e Gross Commission.* \$27,000.00
Additional Fee: \$0.00
Additional Fee Notes:

CALCULATE

This information does not have to be exact. These are estimated numbers that you will be able to change later in the deal. These numbers do not have to match the other side of the deal, either.

Dual Agency Deals

- 12 **Payments** -Your last section is the Payments section. Add the number of payments expected in the box and then click "Generate". A row will populate for each estimated pay date. You can always change these dates later.

Click "Save and Return to Pipeline" to save the Basic Information page for your side of the deal.

PAYMENTS

Of Payments:* GENERATE ?

#	Projected Date	% Of Fee ?	
1	10/22/2021	50.00%	
2	4/22/2022	50.00%	

☐ Ready For Closing

SAVE AND RETURN TO PIPELINE SAVE AND VIEW SUMMARY SAVE AND ADD ANOTHER TRANSACTION

Dual Agency Deals

Updating the Transaction in Your Pipeline

All agents on either side of the deal will be able to update/edit their transaction in their pipeline. If two agents are on the Landlord/Seller side, and one on the Tenant/Buyer side, all three agents will be able to make edits, but the changes will only affect their side.

In the images below you can see how the Landlord and Tenant sides of the transaction are entered into the Pipeline. (This will also be the case for Seller/Buyer transactions.)

Agent #1 has the Landlord/ side:

▼	4714	07/22/2021	Landlord	555 Mangum - 2 Triangle Drive	50%	10/22/2021	\$450,000.00	\$27,000.00	\$15,525.00
---	------	------------	----------	---	-----	------------	--------------	-------------	-------------

Agent #2 has the Tenant side:

▼	4715	CD	07/22/2021	Tenant	Max's Auto Body Shop - Southeast	2,000	\$26.50	60	40%	10/22/2021	\$15,900.00
---	------	----	------------	--------	----------------------------------	-------	---------	----	-----	------------	-------------

Note that both the deal numbers and the figures for these transactions are different. This is okay during the initial process, and agents can edit their individual transactions as they progress with the deal.

Dual Agency Deals

Updating the Transaction in Your Pipeline

Click on the deal in your pipeline to edit the Basic Information. This will bring you to the Pipeline Summary page. Click on the “Edit” button.

You will now be able to edit all the information you previously input. These changes will not reflect on the other side of the deal.

When you have finished your edits, make sure to click any of the buttons at the bottom to save your changes.

TRANSACTION #4714 Alternate ID - 555 Mangum - 2 Triangle Drive Select a Transaction Tag

BASIC INFORMATION

DETAILS

BILLING AND PAYMENTS

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Caitlin A. Maxwell	3,600	\$25.00	60	\$450,000.00	50%	10/22/2021 04/22/2022	\$27,000.00	100%	\$27,000.00	Cold Calling

EDIT **DONE** **FINALIZE DETAILS**

SAVE AND RETURN TO PIPELINE **SAVE AND VIEW SUMMARY** **SAVE AND ADD ANOTHER TRANSACTION**

Save and Return to Pipeline –

Save and return to your Pipeline page.

Save and View Summary –

Save your transaction and view the deal summary.

Save and Add Another Transaction -

Save your current transaction, and open a new screen to add another transaction

Dual Agency Deals

Preparing the Transaction to be Closed

Finalizing a dual agency deal is like closing a normal transaction, but there are some things to keep in mind:

- Once both sides of the deal are ready to finalize the details and close the deal, everything must be done on the Landlord/Seller side of the deal (Side A).
- If you are the agent on the Tenant/Buyer side of the deal, you will not need to finalize details of the deal, as the agent on the Landlord/Seller side will do this. You will be able to see the final details once the two sides have been linked.
- When closing the deal, the agent on the Landlord/Seller side will not be able to see the Internal Review with the other agent's commission split.

Dual Agency Deals

Preparing the Transaction to be Closed

- 1 The agent on the Landlord/Seller side will confirm that the Client and Property sections are correct, and then will add the appropriate Tenant/Buyer to the Parties section.
- 2 In the Brokerage Firms section, the Landlord/Seller party has been auto filled with your firm. To make this a dual agency deal, you will click on the dropdown button, and select “Dual Agency” next to your firm’s name. This will be the first option on the dropdown menu.

PARTIES

LANDLORD

555 Mangum

Landlord, LLC
3015 Carrington Mill Blvd.
Suite 460
Morrisville, NC 27560

TENANT

Max's Auto Body Shop

Max's Auto Body Shop
23 Broad Street
Raleigh, NC 56478
Mary Johnson
(919) 564-5655

BROKERAGE FIRMS

LANDLORD FIRM

Avani Real Estate

Avani Real Estate
307 Fellowship Road
Suite 300
Mount Laurel, NC 27560

TENANT FIRM

Avani Real Estate

Agent

Dual Agency

Dual Agency Deals

Preparing the Transaction to be Closed

- 3 After you add your firm with dual agency, possible matching transactions will populate below. The deal that populates should be the transaction added by the agent representing the tenant. Check the box with the matching transaction.

BROKERAGE FIRMS

LANDLORD FIRM

Avani Real Estate

Avani Real Estate
307 Fellowship Road
Suite 300
Mount Laurel, NC 27560

TENANT FIRM

Avani Real Estate

Avani Real Estate
307 Fellowship Road
Suite 300
Mount Laurel, NC 27560

REFERRING FIRMS (LANDLORD)

Name

All In Realty, LLC - Johnny Johnson

REFERRING FIRMS (TENANT)

Name

Sadie Jackson

Possible Matching Transactions

Search...

	ID	Name	SF
☒	4715	Max's Auto Body Shop - Southeast	2,000

Note that the referring firms added by both the Landlord/Seller agent and the Tenant/Buyer agent will appear once the box has been checked to link the two deals.

Dual Agency Deals

Preparing the Transaction to be Closed

- 4 The Team section should remain unchanged, unless you are adding an agent to the Landlord/Seller side of the deal. No changes should be made here for the Tenant/Buyer side of the deal.
- 5 You can change the payments in the Payments section if necessary.
- 6 Click Next to save all your changes to the Basic Information page.

TEAM 4

Office:
Raleigh/Durham

* **ADD** ?

Name	Percentage	Lead ?	
Caitlin Maxwell	100.00%	☒	

PAYMENTS 5

Of Payments* **GENERATE** ?

#	Projected Date	% Of Fee ?	
1	10/22/2021	50.00%	
2	4/22/2022	50.00%	

NEXT ← 6

Dual Agency Deals

Preparing the Transaction to be Closed

- 7 Continue to complete the Details page like you would with any other deal in Realcore. You will see both sides of the transaction in the Commission Review. You will be able to change the fee percentages for each side, as well as the amounts for the referring firms, if necessary. When all the information is correct, click “Next”.

COMMISSION REVIEW

TOTAL TRANSACTION VALUE: \$450,000.00
FEE PERCENTAGE: 6.00%
ADDITIONAL FEE: \$0.00
FINAL FEE: \$27,000.00

COMMISSION DEDUCTIONS

LANDLORD FIRM
Avani Real Estate

TENANT FIRM
Avani Real Estate

REFERRING FIRM: \$2,025.00
Companies (LANDLORD)

FEE PERCENTAGE: 3.00%
TOTAL FEE: \$11,475.00

FEE PERCENTAGE: 3.00%
TOTAL FEE: \$12,825.00

BILL SEPARATELY: ☐

Name	Fee	
All In Realty, LLC - Johnny Johnson	15.00%	 

REFERRING FIRM: \$675.00
Companies (TENANT)

Name	Fee	
Sadie Jackson	5.00%	 

BACK

NEXT

Dual Agency Deals

Preparing the Transaction to be Closed

- 8 The final page is the Billing and Payments page. Review the information and do one of the following:
- Check the box next to “Ready For Closing” if the transaction is ready to be closed by administrators, and then click “Done” to return to your pipeline page.
 - Just click “Done” to return to your pipeline page.
 - If you can close your own deals, you will also be able to see the Internal Review page before clicking “Done”.

MODIFY PAYMENTS

OVERVIEW

TOTAL FEE: \$27,000.00

OUTSIDE FIRM FEE: \$12,825.00

FEE PERCENTAGE: 6.00%

REFERRING FIRM FEE: \$2,025.00

INTERNAL FEE: \$11,475.00

TENANT REFERRING FIRM FEE: \$675.00

a

☒ Ready For Closing

Drag a row to change the order of the payments.

Search...

	#	% of Fee	Amount	Tenant Side	Tenant Referring Firm	Referring Firm	Landlord Side	Invoice Sent	Projected	
☐	1	50.00%	\$13,500.00	\$6,412.50	\$337.50	\$1,012.50	\$5,737.50		10/22/2021	
☐	2	50.00%	\$13,500.00	\$6,412.50	\$337.50	\$1,012.50	\$5,737.50		04/22/2022	
		100.00%	\$27,000.00	\$12,825.00	\$675.00	\$2,025.00	\$11,475.00			

Page 1 of 1 (2 items) < 1 > Page size: 24

BACK

b

DONE

Dual Agency Deals

About Linked Transactions for Dual Agency

When you prepared the transaction to be closed, you linked the two sides of the deal together. Each agent will still be able to see their side of the deal in their Pipeline. The Landlord/Seller will be side “A”, and the Tenant/Buyer side “B”.

Keep in mind that now the deals are linked, so all edits to the transaction should be done on the Landlord/Seller side, or “Side A”.

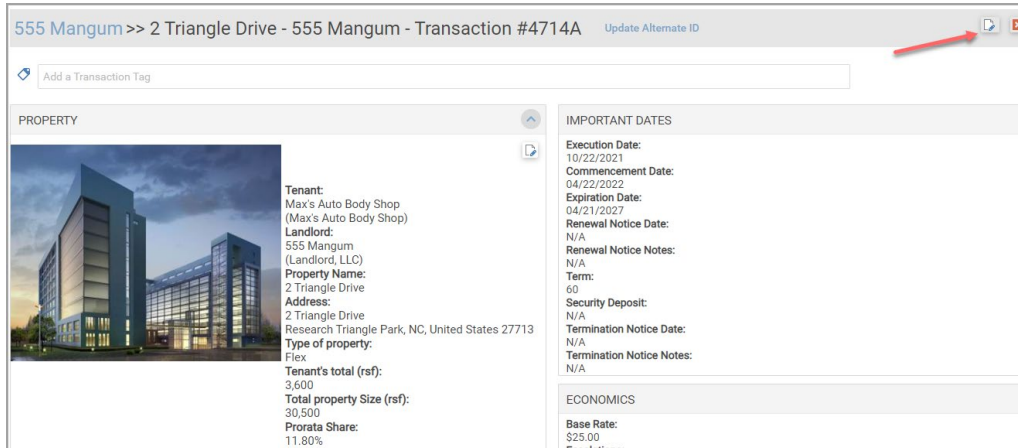
How the transaction appears for the Landlord agent									
✓	4714A	07/26/2021	Landlord	Max's Auto Body Shop - 2 Triangle Drive	50%	10/22/2021	\$450,000.00	\$27,000.00	\$6,598.13
How the transaction appears for the Tenant agent									
	4714B	07/22/2021	Tenant	Max's Auto Body Shop - Southeast	40%	10/22/2021	\$450,000.00	\$15,900.00	\$3,847.50

Dual Agency Deals

Editing Linked Transactions for Dual Agency

You can still edit a transaction once both sides are linked in Realcore, but all edits should be done on the Landlord/Seller side, or “Side A.”

After clicking the Side A transaction in the pipeline, click on the “Edit” icon in the upper right corner. Any changes made to the transaction will automatically change the Tenant/Buyer (or B side) of the transaction.



555 Mangum >> 2 Triangle Drive - 555 Mangum - Transaction #4714A [Update Alternate ID](#)

[Add a Transaction Tag](#)

PROPERTY



Tenant:
Max's Auto Body Shop
(Max's Auto Body Shop)
Landlord:
555 Mangum
(Landlord, LLC)
Property Name:
2 Triangle Drive
Address:
2 Triangle Drive
Research Triangle Park, NC, United States 27713
Type of property:
Flex
Tenant's total (rsf):
3,600
Total property Size (rsf):
30,500
Prorata Share:
11.80%

IMPORTANT DATES

Execution Date:
10/22/2021
Commencement Date:
04/22/2022
Expiration Date:
04/21/2027
Renewal Notice Date:
N/A
Renewal Notice Notes:
N/A
Term:
60
Security Deposit:
N/A
Termination Notice Date:
N/A
Termination Notice Notes:
N/A

ECONOMICS

Base Rate:
\$25.00

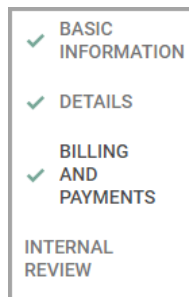
Dual Agency Deals

Closing a Dual Agency Transaction (for Agents)

- 1 If your firm has agents close their own deals, you can do so by clicking the “Close” icon at the far end of your transaction on the pipeline. *Remember that all deals must be closed from the Landlord/Seller side of the deal (Side A.)*

ID	Updated	Type ▾	Transaction	Chance ▾	Pay Date	Transaction Value	My Gross	My Fee	
4714A	07/26/2021	Landlord	Max's Auto Body Shop - 2 Triangle Drive	50%	10/22/2021	\$450,000.00	\$27,000.00	\$5,737.50	

- 2 Review all the information on the Basic Information, Details, and Billing and Payments pages. You will still be able to make any necessary changes. However, keep in mind these will also reflect on the Tenant/Buyer side (B Side) of the transaction.



Dual Agency Deals

Closing a Dual Agency Transaction (for Agents)

- 3 The Internal Review page is the last page when closing a transaction. You will only be able to see your side of the transaction on the Internal Review page. (If you need assistance regarding splits, please see your Realcore administrator.) Confirm all the information is correct and click “Next”.

TRANSACTION #4714A - Max's Auto Body Shop - 2 Triangle Drive Select a Transaction Tag

✓ BASIC INFORMATION

✓ DETAILS

✓ BILLING AND PAYMENTS

INTERNAL REVIEW

INTERNAL REVIEW

LANDLORD TENANT

AVANI REAL ESTATE - LANDLORD

COMPANY FEE PERCENTAGE: 3.00%

COMPANY DEDUCTIONS: \$11,475.00

FINAL FEE: - \$0.00

FINAL FEE: \$11,475.00

Double click into the cells to change the split percentages or amount of any team member

Name	Percentage	Fee	Lead	
Caitlin Maxwell	100.00%	\$11,475.00	☒	✗
	100.00%			

COMMISSION DEDUCTIONS

☐ Check this box if this is a confidential transaction. If checked, this deal will not appear in comps and exports.

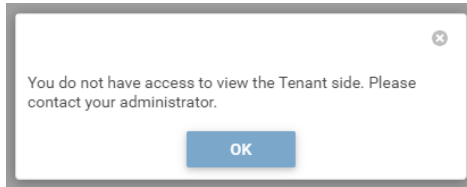
BACK

NEXT

Dual Agency Deals

Closing a Dual Agency Transaction (for Agents)

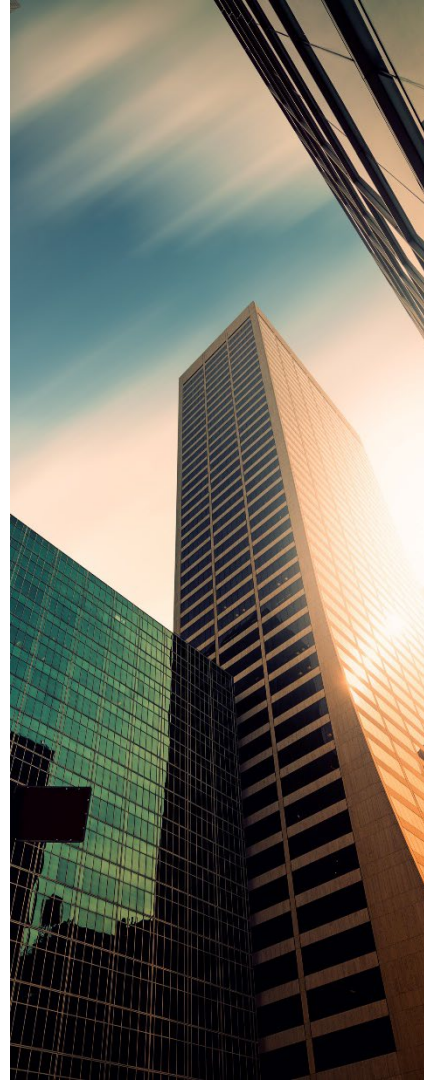
- 4 After clicking “Next”, you may get a message that says “You do not have access to view the Tenant/Buyer side. Please contact your administrator”. This message shows to agents who do not have the permissions to see the other side’s commission splits. Click “OK”.



- 5 You are now ready to close the transaction. Click “Close Transaction” to complete the process. You will be closing both Side A and Side B when you close the transaction.

A screenshot of a web form titled "TRANSACTION #4714A - Max's Auto Body Shop - 2 Triangle Drive". On the left is a sidebar with a list of sections: "BASIC INFORMATION", "DETAILS", "BILLING AND PAYMENTS", and "INTERNAL REVIEW". The "INTERNAL REVIEW" section is currently selected. The main content area has a tabbed interface with "LANDLORD" and "TENANT" tabs; the "TENANT" tab is active. Below the tabs is a checkbox with the text: "Check this box if this is a confidential transaction. If checked, this deal will not appear in comps and exports." At the bottom of the form are three buttons: "BACK", "SAVE", and "CLOSE TRANSACTION". The "CLOSE TRANSACTION" button is highlighted with a red rectangular border.

SALES

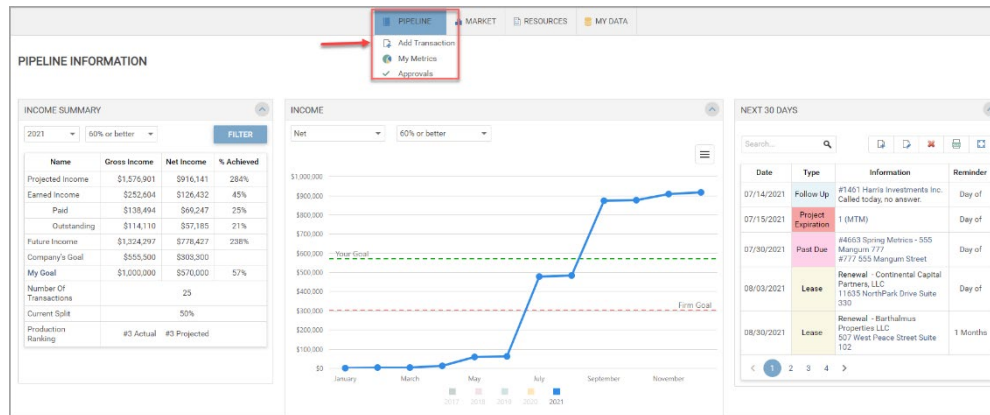


Sales Transactions

A new Pipeline Transaction can be created by selecting “Add Transaction” from the Main Menu drop down.

Add basic information for your deal. Put the basic details in for the transaction on the Basic Information page. The sections below are available when beginning a pipeline transaction.

- Client and Status
- Property or Location
- Parties
- Brokerage Firms
- Team
- Commissions
- Payments



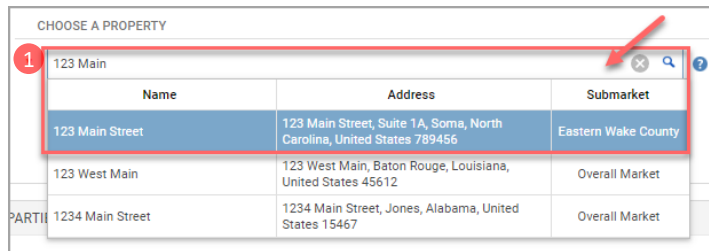
Client & Status

- 1 Enter the name of your Client in the search bar. The clients you have already input will populate for you to choose from. Click on the client you want, or you can add it.
- 2 Using the dropdown, choose your representation. You can choose from Landlord, Tenant, Buyer, Seller, or Consulting. For this sale example we will choose "Seller".
- 3 Use the dropdown to choose your Chance of Closing. You can always change this later on.

The screenshot shows a web form titled 'CLIENT & STATUS' under a 'BASIC INFORMATION' tab. At the top, there is a 'Region:' dropdown menu set to 'Raleigh/Durham'. Below this is a search section titled 'Choose a Client:'. It contains a search bar with 'Steven Byrd' entered, a magnifying glass icon, and a help icon. A red box highlights this search section, with a red circle '1' next to the search bar. Below the search bar are two dropdown menus: 'Representation:' set to 'Seller' and 'Chance of Closing:' set to '50%'. Red circles '2' and '3' are placed next to these dropdowns respectively. To the right of the search section, the client's details are displayed: 'Steven Byrd' in blue, followed by his address '234 Trinity Street, Suite 350, Cary, NC 27560' and a 'Source: Caitlin Maxwell' note. A document icon is also present.

Property or Location

1 Choose your property by entering the name in the search bar. The properties that you have already input will populate for you to choose from. If your property is not in the list, you can add it.

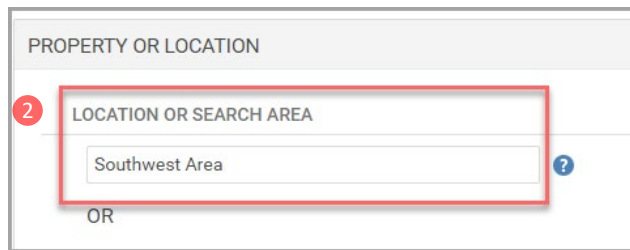


CHOOSE A PROPERTY

1 123 Main

Name	Address	Submarket
123 Main Street	123 Main Street, Suite 1A, Soma, North Carolina, United States 789456	Eastern Wake County
123 West Main	123 West Main, Baton Rouge, Louisiana, United States 45612	Overall Market
1234 Main Street	1234 Main Street, Jones, Alabama, United States 15467	Overall Market

2 If you are doing a Buyer representation and do not know the property yet, you can add a location instead.



PROPERTY OR LOCATION

2 LOCATION OR SEARCH AREA

Southwest Area

OR

Parties & Brokerage Firms

Parties

- 1 The appropriate parties will auto-fill from the information you input for the Client. You will be able to add the other party later when you have more details about the transaction.

Brokerage Firms

- 2 Your firm will show up automatically as Seller or Buyer firm, depending on the representation type of the transaction. Outside firms can be added later when you have more details about the transaction.
- 3 You can also add Referring Firms in this section by selecting them in the search bar, but you will also have the opportunity to do this later when you have more details about the transaction.

The screenshot displays two sections of a software interface. The top section, titled 'PARTIES' (highlighted with a red box and a red circle with the number 1), contains a 'SELLER' field (also highlighted with a red circle with the number 1) and a 'BUYER' field. The 'SELLER' field is populated with the name 'Steven Byrd' and his address: 'Steven Byrd, 234 Trinity Street, Suite 350, Cary, NC 27560', along with the phone number '(504) 444-5555' and the source 'Caitlin Maxwell'. Below this is a 'Choose an entity:' dropdown menu. The bottom section, titled 'BROKERAGE FIRMS' (highlighted with a red box and a red circle with the number 2), contains three fields: 'SELLER FIRM' (highlighted with a red circle with the number 2), 'BUYER FIRM', and 'REFERRING FIRMS' (highlighted with a red circle with the number 3). The 'SELLER FIRM' field is populated with the name 'Avani Real Estate' and its address: 'Avani Real Estate, 307 Fellowship Road, Suite 300, Mount Laurel, NC 27560'. The 'BUYER FIRM' and 'REFERRING FIRMS' fields are currently empty.

Team

- 1 The Team is referencing any Agents “in house” (within your company office or another branch location) that are on this deal. Search for the agent’s name in the bar and click "Add".
- 2 Update each agent’s share by double clicking in the percentage cell.
(TIP: This percentage is not your individual split with the company. This is the “off the top” split agreement.)
- 3 If the combination of agents and percentage splits are a common selection for you, you can save this as a Team. A pop-up will appear asking if you want to create a "team combination". Enter a team name and Save to add this Team to your list. Your team will populate in the chart below with each agent's commission percentage and their fee.

(TIP: Each Team created is specific to the user that creates it - meaning, no one else sees these Teams.)

TEAM

Office:
Raleigh/Durham

* Caitl
Caitlin Maxwell
Caitlin Person

ADD ?

TEAM

Office:
Raleigh/Durham

*

ADD

Is this a team combination you would like to save?
If yes, please name:
Office Team

SAVE

Name	Percentage	Lead	
Caitlin Maxwell	50.00%	☒	✕
Cathy Dalton	50.00%	☐	✕

Commissions

- 1 Enter your Total Fee percentage. This information can be changed later. The, enter the following information:
 - 2 Estimated \$/SF
 - 4 Transaction Value
 - 3 Total SF
 - 5 Gross Commission
- 6 If some of the required information is unknown, you can use the Calculate button to fill in the missing information. However, you must have the minimum required pieces of information. Once you have entered the known information, click "Calculate".

The screenshot shows the 'COMMISSIONS' form with the 'SELECT FEE TYPE' dropdown menu open. A red box highlights the dropdown menu, and a red circle with the number 1 is placed next to it. The dropdown menu options are: Fee*, -Select-, Fee By %, Fee By \$SF, and Other. The form also includes fields for 'Term (months)*', 'Gross Commission*', and 'ESTIMATED TRANSACTION CALC'.

The screenshot shows the 'COMMISSIONS' form with the 'ESTIMATED TRANSACTION CALCULATIONS' section. The 'Fee*' dropdown menu is set to 'Fee By %' with a red circle and number 1 next to it. The 'Total Fees*' field shows '4.00%'. Below this, the 'ESTIMATED TRANSACTION CALCULATIONS' section displays the following values:

Field	Value
2 Estimated \$/SF*	\$195.00
3 Total SF*	15,012.00
4 Transaction Value*	\$2,927,340.00
5 Gross Commission*	\$117,093.60
Additional Fee:	\$0.00

At the bottom, there is a 'CALCULATE' button and an 'Additional Fee Notes' text area.

Payments

- 1 Add the number of payments expected in the box and then click "Generate".
- 2 A row will populate for each estimated pay date. You can always change these dates later.

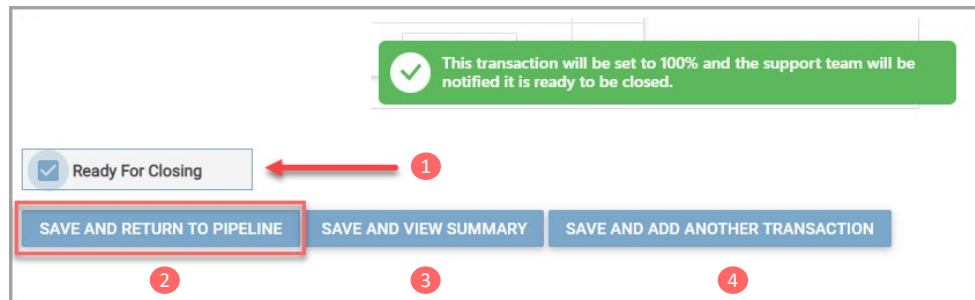
PAYMENTS

1 # Of Payments: GENERATE ?

#	Projected Date	% Of Fee ?	
2 1	12/1/2022 	100.00%	 

Saving the Basic Information of a Deal

- 1 If you do not close your own deals but have completed your portion of information for the deal, you can now check the "Ready For Closing" box. This box will notify your administrator that the deal is ready to have additional details added for closing. You do not need to check this box if you close your own transactions.



- 2 After you check the box, click the "Save and Return to Pipeline" button, which will take you back to Pipeline page.

You can also choose to:

- 3 Save and View Summary - Save your transaction and view the deal summary.
- 4 Save and Add Another Transaction - Save your current transaction and open a new screen to add another transaction.

Editing a Transaction

After adding a transaction to your pipeline, you will be able to see it on your Pipeline page. In the Transactions View, you can use the search box to search by deal number or other related information to the deal.

TRANSACTIONS											
Transactions View		Search all data...									
ID	Updated	Type	Transaction	Chance	Pay Date	Transaction Value	My Gross	My Fee	Latest Note		
4921	12/06/2022	Seller	Steven Byrd - 123 Main Street	50%	12/01/2022	\$2,927,340.00	\$58,546.80	\$35,128.08			

Click on the deal in the pipeline that you want to edit. This will bring you to the Pipeline Summary page.

(If your screen does not look like the image below, please go to Page 12.)

TRANSACTION #4921 Alternate ID - Steven Byrd - 123 Main Street

BASIC INFORMATION
DETAILS
BILLING AND PAYMENTS
INTERNAL REVIEW

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Caitlin A. Maxwell Cathy Dalton	15,012	\$195.00	0	\$2,927,340.00	50%	12/01/2022	\$117,093.60	50% 50%	\$58,546.80 \$58,546.80	Caitlin Maxwell

☐ Ready For Closing

EDIT

DONE

FINALIZE DETAILS

Editing a Transaction

At the bottom of the Pipeline Summary, you will see three buttons.

- 1 Edit - The Edit button allows you to edit the Basic Information of the deal. This is only the information that you entered when first adding the transaction to your pipeline.
- 2 Done – The Done button simply returns you to your Pipeline page.
- 3 Finalize Details - The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For sales this would include an executed contract, or if you want to add escrow or critical date information.

TRANSACTION #4921 - **Steven Byrd - 123 Main Street**

BASIC INFORMATION
DETAILS
BILLING AND PAYMENTS
INTERNAL REVIEW

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Caitlin A. Maxwell Cathy Dalton	15,012	\$195.00	0	\$2,927,340.00	50%	12/01/2022	\$117,093.60	50% 50%	\$58,546.80 \$58,546.80	Caitlin Maxwell

☐ Ready For Closing

1

EDIT

2

DONE

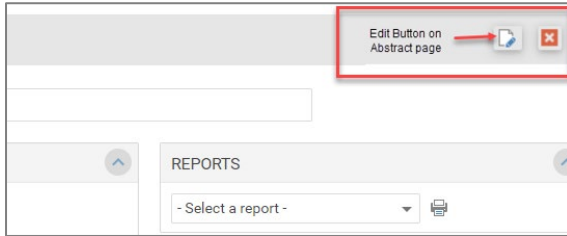
3

FINALIZE DETAILS

Note that not all firms require that agents Finalize Details. When adding these details, Realcore requires detailed information that can be changed later. Some firms only require agents to enter Basic Information. Check with your administration team if you are unsure.

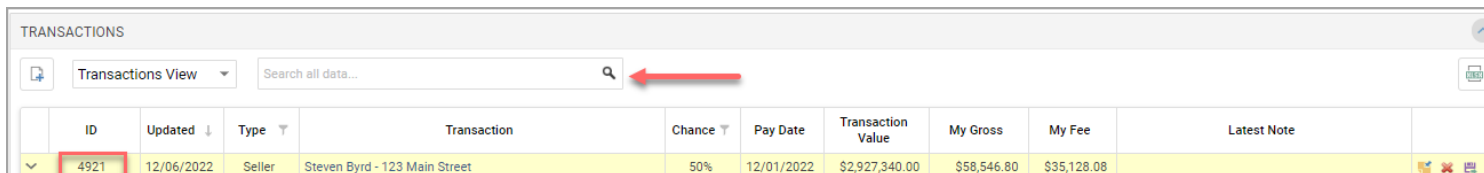
Editing a Transaction

If you have already clicked the Finalize Details button before, you will be taken to the abstract page after clicking on your deal in the Pipeline. You can edit your transaction from the abstract page by clicking on the Edit icon in the upper right corner of the screen.



Finalizing the Details

- 1 Click on the deal in the pipeline that you want to add details. This will bring you to the Pipeline Summary page.

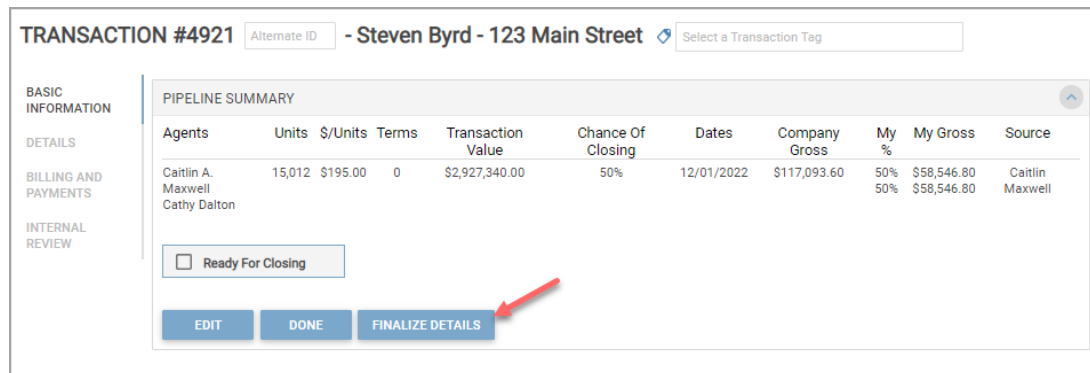


TRANSACTIONS

Transactions View Search all data...

ID	Updated	Type	Transaction	Chance	Pay Date	Transaction Value	My Gross	My Fee	Latest Note
4921	12/06/2022	Seller	Steven Byrd - 123 Main Street	50%	12/01/2022	\$2,927,340.00	\$58,546.80	\$35,128.08	

- 2 The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For sales this would include an executed contract, or if you want to add escrow or critical date information. Click the Finalize Details button when you have this information.



TRANSACTION #4921 Alternate ID - Steven Byrd - 123 Main Street Select a Transaction Tag

BASIC INFORMATION

DETAILS

BILLING AND PAYMENTS

INTERNAL REVIEW

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Caitlin A. Maxwell Cathy Dalton	15,012	\$195.00	0	\$2,927,340.00	50%	12/01/2022	\$117,093.60	50% 50%	\$58,546.80 \$58,546.80	Caitlin Maxwell

☐ Ready For Closing

EDIT DONE FINALIZE DETAILS

Finalizing the Details

- 3 Confirm your Client, Representation type, and Chance of Closing are still accurate. You can edit the Client information by clicking on the edit icon to the right.

CLIENT & STATUS

Choose a Client*
Steven Byrd

Representation* Seller

Chance of Closing* 50%

Steven Byrd
234 Trinity Street
Suite 350
Cary, NC 27560

Source: Caitlin Maxwell

- 4 Add or confirm the property. You can also edit the property's details by clicking on the edit icon to the right.

PROPERTY OR LOCATION

123 Main Street

123 Main Street
Suite 1A
Soma, NC 789456

CHOOSE A PROPERTY
123 Main Street 123 Main Street, Suite 1A, Soma, North (

Unit/Suite:

Property Type: Retail
Submarket: Eastern Wake County
Square Footage: 12,000
Vacant Square Footage: 4,000

MLS #: N/A
Parcel #: N/A
Assessed Value: N/A

Township: N/A
Zoning: N/A
Other: N/A

Finalizing the Details

- 5 In the Parties section, your client is automatically listed as the appropriate party. Here you will need to add a Buyer for a Seller representation or a Seller for a Buyer representation.

PARTIES

SELLER

Steven Byrd
Steven Byrd
234 Trinity Street
Suite 350
Cary, NC 27560

BUYER

James Property Group

James Property Group
564 Radish Dr.
Cary, NC 27650

- 6 Your firm is automatically listed for the appropriate representation in the Brokerage Firms section. Here you can add an outside firm and/or referring firm if applicable.

BROKERAGE FIRMS

SELLER FIRM

Avani Real Estate
Avani Real Estate
307 Fellowship Road
Suite 300
Mount Laurel, NC 27560

BUYER FIRM

Coastal Properties - Nichole Johnson

REFERRING FIRMS

All In Realty, LLC - Johnny Johnson

Coastal Properties
Coastal Properties
6350 Ravenel Ct
Raleigh, NC 75684
(843) 564-5656
Nichole Johnson

Finalizing the Details

- 7 The information in the Team and the Payments section is the same as it was when you initially entered the deal. You can change this information at any point before closing out the transaction.

When everything looks correct on the Basic Information page, click the Next button to proceed to the Details page.

TEAM

Office:

Raleigh/Durham

*

ADD

?

Name	Percentage	Lead	
Caitlin Maxwell	50.00%	☒	☒
Cathy Dalton	50.00%	☐	☒

PAYMENTS

Of Payments:*

1

GENERATE

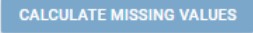
?

#	Projected Date	% Of Fee	
1	12/1/2022	100.00%	☒

NEXT

Finalizing the Details

- 8 The Dates and Sale Terms section of the Details page is where you will input specific details of the sale. The Execution Date, Sale Date, Date Prepared, # of Units, Unit Price, Sale Price, Fee, and Total Fees are all required information.

DATES & SALE TERMS	
Execution Date:*	12/6/2022 
Sale Date:*	12/16/2022 
Date Prepared:*	12/6/2022 
# Of Units:*	15,012.0
Unit Price:*	\$195.00
Sale Price:*	\$2,927,340.00
Fee:*	Fee By % 
Total Fees:*	4.00%
	

Finalizing the Details

- 9 The Important Dates and Escrow Information sections are completely optional.

In the Important Dates section, the Execution date and Projected Closing will automatically populate based on the information entered in the Dates & Sale Terms section.

IMPORTANT DATES

Execution: 12/6/2022

Due Diligence Expiration:

Projected Closing: 12/16/2022

Title Objection:

Finance Contingency:

Entitlement:

Appraisal Contingency:

Other Title 1:

Other Date 1:

Other Title 2:

Other Date 2:

ESCROW INFORMATION

Escrow Amount: \$0.00

Escrow Received:

NOI:

CAP Rate:

Check Number:

Finalizing the Details

- 10 The last section of the Details page is the Commission Review. This section will give you a breakdown of the transaction's fees. Be sure to change the percentages for each firm (if applicable). You can edit the Referring Firm's fees by clicking the edit icon and adding or changing the percentage or dollar amount. Click "Update" at the bottom of the Referring Firm box after making any changes.

When you have completed the Details page, click the Next button to go to the Billing and Payments page.

COMMISSION REVIEW

TOTAL TRANSACTION VALUE: \$2,927,340.00 COMMISSION DEDUCTIONS

FEE PERCENTAGE: 4.00%

\$117,093.60

ADDITIONAL FEE: \$0.00

FINAL FEE: \$117,093.60

SELLER FIRM: Avani Real Estate

BUYER FIRM: Coastal Properties

REFERRING FIRM: \$8,782.02 Companies

Name	Fee	
All in Realty, LLC - Johnny Johnson	15.00%	

Notes:

15.00%

OR

\$0.00

Update Cancel

BILL SEPARATELY: ☐

BACK NEXT

Finalizing the Details

- 11 The Billing and Payments page is the last step for completing your transaction. Confirm that the billing contact is correct, as well as the projected dates for payment. If everything looks good, then your transaction is complete.

If you are ready to close the transaction, click the box next to "Ready For Closing". This will notify your administration team that the transaction is ready to be processed.

If you are not ready to close, simply click the "Done" button at the bottom of the page to return to your pipeline.

Note: The Critical Dates report will generate a report based on the dates entered in the Important Dates section on the Details page.

The screenshot displays the 'BILLING & PAYMENTS' section of a software interface. At the top, there is a 'Choose Billing' dropdown menu currently set to '3806 - Steven Byrd'. Below this, the 'CURRENT BILLING CONTACT' is listed as Steven Byrd, with an address: 234 Trinity Street, Suite 350, Cary, NC 27560. A section titled 'MODIFY PAYMENTS' contains an 'OVERVIEW' of fees: TOTAL FEE: \$117,093.60, FEE PERCENTAGE: 4.00%, INTERNAL FEE: \$49,764.78, OUTSIDE FIRM FEE: \$58,546.80, and REFERRING FIRM FEE: \$8,782.02. A checkbox labeled 'Ready For Closing' is highlighted with a red box. Below the fees, there is a search bar and a table with columns: #, % of Fee, Amount, Coastal Properties, Referring Firm, Our Firm, Invoice Sent, and Projected. The table contains one row with the following data: #1, 100.00%, \$117,093.60, \$58,546.80, \$8,782.02, \$49,764.78, and a projected date of 12/01/2022. At the bottom, there are 'BACK' and 'DONE' buttons, with the 'DONE' button highlighted by a red box. To the right of the 'DONE' button is a red arrow pointing to a 'CRITICAL DATES REPORT' button.

BILLING & PAYMENTS

Choose Billing*

3806 - Steven Byrd

CURRENT BILLING CONTACT

Steven Byrd

234 Trinity Street
Suite 350
Cary, NC 27560

MODIFY PAYMENTS

OVERVIEW

TOTAL FEE: \$117,093.60 OUTSIDE FIRM FEE: \$58,546.80
FEE PERCENTAGE: 4.00% REFERRING FIRM FEE: \$8,782.02
INTERNAL FEE: \$49,764.78

☐ Ready For Closing

Drag a row to change the order of the payments.

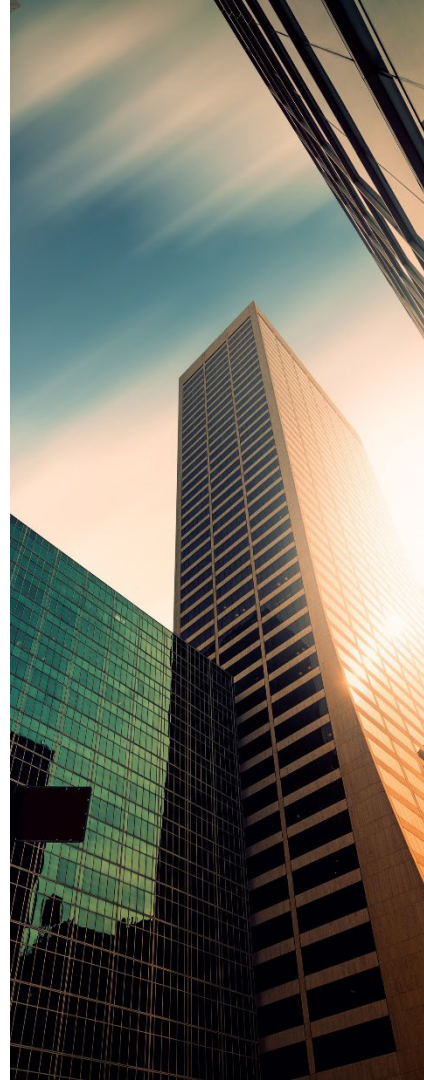
Search...

#	% of Fee	Amount	Coastal Properties	Referring Firm	Our Firm	Invoice Sent	Projected
☐ 1	100.00%	\$117,093.60	\$58,546.80	\$8,782.02	\$49,764.78		12/01/2022
	100.00%	\$117,093.60	\$58,546.80	\$8,782.02	\$49,764.78		

Page 1 of 1 (1 items) 1 Page size: 24

BACK DONE CRITICAL DATES REPORT

CONSULTING

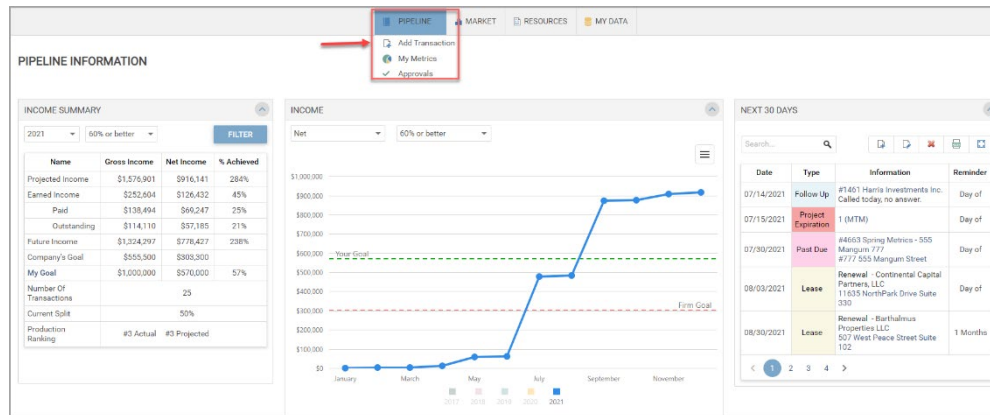


Consulting Transactions

A new Pipeline Transaction can be created by selecting “Add Transaction” from the Main Menu drop down.

Add basic information for your deal. Put the basic details in for the transaction on the Basic Information page. The sections below are available when beginning a pipeline transaction.

- Client and Status
- Property or Location
- Brokerage Firms
- Team
- Commissions
- Payments



Client & Status

- 1 Enter the name of your Client in the search bar. The clients you have already input will populate for you to choose from. Click on the client you want, or you can add it.
- 2 Using the dropdown, choose your representation. You can choose from Landlord, Tenant, Buyer, Seller, or Consulting. For this sale example we will choose “Consulting”.
- 3 Use the dropdown to choose your Chance of Closing. You can always change this later on.

The screenshot shows a web form titled "CLIENT & STATUS". A red box highlights the "Choose a Client:" section, which contains three numbered callouts: 1 points to the search input field containing "Capital City Real Estate"; 2 points to the "Representation:" dropdown menu set to "Consulting"; and 3 points to the "Chance of Closing:" dropdown menu set to "50%". To the right of the highlighted section, the form displays the client details: "Capital City Real Estate" (in blue), "1234 South Street", "Cary, NC 23659", and "Source: Aaron Anderson".

Property

1 Choose your property by entering the name in the search bar. The properties that you have already input will populate for you to choose from. If your property is not on the list, you can add it.

2 If you have a referring firm for this consulting deal, you can add them in the “Brokerage Firms section.

PROPERTY OR LOCATION

LOCATION OR SEARCH AREA

OR

1

CHOOSE A PROPERTY

123 Main Street

Unit/Suite:

123 Main Street

123 Main Street Suite 1A Soma, NC 789456

Property Type: Retail

MLS #: N/A

Township: N/A

Submarket: Eastern Wake County

Parcel #: N/A

Zoning: N/A

Square Footage: 12,000

Assessed Value: N/A

Other: N/A

Vacant Square Footage: 4,000

Map

Satellite



BROKERAGE FIRMS

REFERRING FIRMS

61

Team

- 1 The Team is referencing any Agents “in house” (within your company office or another branch location) that are on this deal. Search for the agent’s name in the bar and click "Add".
- 2 Update each agent’s share by double clicking in the percentage cell.
(TIP: This percentage is not your individual split with the company. This is the “off the top” split agreement.)
- 3 If the combination of agents and percentage splits are a common selection for you, you can save this as a Team. A pop-up will appear asking if you want to create a "team combination". Enter a team name and Save to add this Team to your list. Your team will populate in the chart below with each agent's commission percentage and their fee.

(TIP: Each Team created is specific to the user that creates it - meaning, no one else sees these Teams.)

TEAM

Office:
Raleigh/Durham

* Caitl
Caitlin Maxwell
Caitlin Person

ADD ?

TEAM

Office:
Raleigh/Durham

*

ADD

Is this a team combination you would like to save?

If yes, please name:

Office Team

SAVE

Name	Percentage	Lead
Caitlin Maxwell	50.00%	☒
Cathy Dalton	50.00%	☐

Commissions & Payments

- 1 Enter the Gross Commission for the Consulting deal. You can also add an amount to the Additional Fee box with an explanation in the Additional Fee Notes box.
- 2 Add the number of payments expected in the box and then click "Generate".
- 3 A row will populate for each estimated pay date. You can always change these dates later.

COMMISSIONS

ESTIMATED TRANSACTION CALCULATIONS

1 Gross Commission:* \$5,000.00

Additional Fee: \$0.00

Additional Fee Notes:

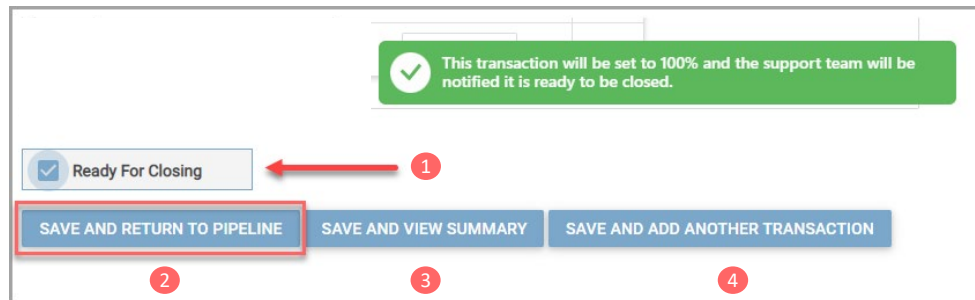
PAYMENTS

2 # Of Payments:* 1 GENERATE ?

#	3 Projected Date	% Of Fee ?	
1	12/1/2022	100.00%	

Saving the Basic Information of a Deal

- 1 If you do not close your own deals but have completed your portion of information for the deal, you can now check the "Ready For Closing" box. This box will notify your administrator that the deal is ready to have additional details added for closing. You do not need to check this box if you close your own transactions.



- 2 After you check the box, click the "Save and Return to Pipeline" button, which will take you back to Pipeline page.

You can also choose to:

- 3 Save and View Summary - Save your transaction and view the deal summary.
- 4 Save and Add Another Transaction - Save your current transaction and open a new screen to add another transaction.

Editing a Transaction

After adding a transaction to your pipeline, you will be able to see it on your Pipeline page. In the Transactions View, you can use the search box to search by deal number or other related information to the deal.



ID	Updated	Type	Transaction	Chance	Pay Date	Transaction Value	My Gross	My Fee	Latest Note
4923	12/07/2022	Consulting	Capital City Real Estate - 123 Main Street	50%	12/01/2022	\$5,000.00	\$5,000.00	\$3,000.00	

Click on the deal in the pipeline that you want to edit. This will bring you to the Pipeline Summary page.

(If your screen does not look like the image below, please go to Page 12.)



TRANSACTION #4923 Alternate ID - Capital City Real Estate - 123 Main Street Select a Transaction Tag

BASIC INFORMATION

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Aaron Anderson	0	\$0.00	0	\$5,000.00	50%	12/01/2022	\$5,000.00	100%	\$5,000.00	Aaron Anderson

☐ Ready For Closing

EDIT **DONE** **FINALIZE DETAILS**

Editing a Transaction

At the bottom of the Pipeline Summary, you will see three buttons.

- 1 Edit - The Edit button allows you to edit the Basic Information of the deal. This is only the information that you entered when first adding the transaction to your pipeline.
- 2 Done – The Done button simply returns you to your Pipeline page.
- 3 Finalize Details - The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For sales this would include an executed contract, or if you want to add escrow or critical date information.



TRANSACTION #4923 - Capital City Real Estate - 123 Main Street

BASIC INFORMATION

BILLING AND PAYMENTS

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Aaron Anderson	0	\$0.00	0	\$5,000.00	50%	12/01/2022	\$5,000.00	100%	\$5,000.00	Aaron Anderson

☐ Ready For Closing

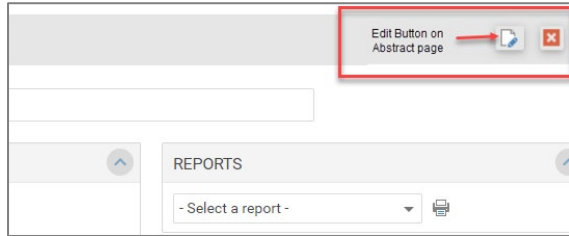
EDIT DONE FINALIZE DETAILS

1 2 3

Note that not all firms require that agents Finalize Details. When adding these details, Realcore requires detailed information that can be changed later. Some firms only require agents to enter Basic Information. Check with your administration team if you are unsure.

Editing a Transaction

If you have already clicked the Finalize Details button before, you will be taken to the abstract page after clicking on your deal in the Pipeline. You can edit your transaction from the abstract page by clicking on the Edit icon in the upper right corner of the screen.



Finalizing the Details

- 1 Click on the deal in the pipeline that you want to add details. This will bring you to the Pipeline Summary page.

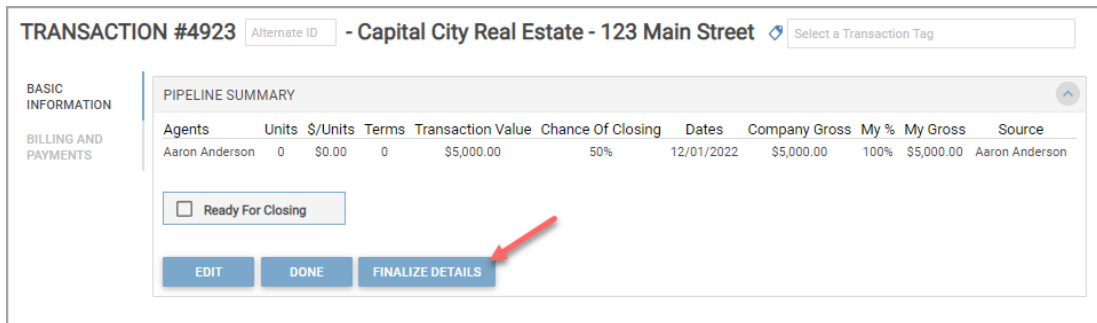


TRANSACTIONS

Transactions View 4923

ID	Updated	Type	Transaction	Chance	Pay Date	Transaction Value	My Gross	My Fee	Latest Note
4923	12/07/2022	Consulting	Capital City Real Estate - 123 Main Street	50%	12/01/2022	\$5,000.00	\$5,000.00	\$3,000.00	

- 2 The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For sales this would include an executed contract, or if you want to add escrow or critical date information. Click the Finalize Details button when you have this information.



TRANSACTION #4923 Alternate ID - Capital City Real Estate - 123 Main Street Select a Transaction Tag

BASIC INFORMATION

BILLING AND PAYMENTS

PIPELINE SUMMARY

Agents	Units	\$/Units	Terms	Transaction Value	Chance Of Closing	Dates	Company Gross	My %	My Gross	Source
Aaron Anderson	0	\$0.00	0	\$5,000.00	50%	12/01/2022	\$5,000.00	100%	\$5,000.00	Aaron Anderson

☐ Ready For Closing

EDIT DONE FINALIZE DETAILS

Finalizing the Details

- 3 Confirm your Client, Representation type, and Chance of Closing are still accurate. You can edit the Client information by clicking on the edit icon to the right.

CLIENT & STATUS

Choose a Client: *
Capital City Real Estate

Representation: * Consulting

Chance of Closing: * 50%

Capital City Real Estate
1234 South Street
Cary, NC 23659

Source: Aaron Anderson

- 4 Add or confirm the property. You can also edit the property's details by clicking on the edit icon to the right.

PROPERTY OR LOCATION

123 Main Street

123 Main Street
Suite 1A
Soma, NC 789456

CHOOSE A PROPERTY
* 123 Main Street 123 Main Street, Suite 1A, Soma, North (

Unit/Suite:

Property Type: Retail
MLS #: N/A
Township: N/A
Submarket: Eastern Wake County
Parcel #: N/A
Zoning: N/A
Square Footage: 12,000
Assessed Value: N/A
Other: N/A
Vacant Square Footage: 4,000

Finalizing the Details

- 5 In the Dates & Terms section, you can add a Project Name for the transaction, as well as notes to describe the purpose or details of the deal.
- 6 If there is a referring firm on the deal, you can add them to the Brokerage Firms section. Otherwise, leave this area blank.

DATES & TERMS

Project Name:

Notes:

Completion Date*:

Consulting Fee*:

BROKERAGE FIRMS

REFERRING FIRMS

Finalizing the Details

- 7 The information in the Team and the Payments section is the same as it was when you initially entered the deal. You can change this information at any point before closing out the transaction.

TEAM

Office:
Raleigh/Durham

*

▼

ADD

?

Name	Percentage	Lead ?	
Caitlin Maxwell	50.00%	☒	✖
Cathy Dalton	50.00%	☐	✖

PAYMENTS

Of Payments: * 1

GENERATE ?

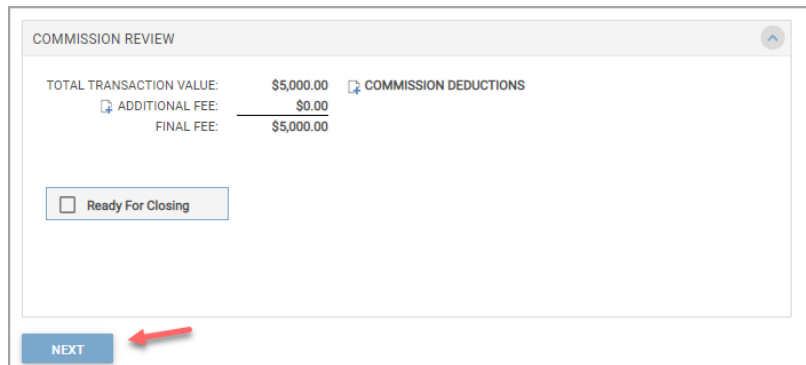
#	Projected Date	% Of Fee ?	
1	12/1/2022	100.00%	✖

NEXT

Finalizing the Details

- 8 The last section of the Details page is the Commission Review. This section will give you a breakdown of the transaction's fees.

When you have completed everything on the Details page, click the Next button to go to the Billing and Payments page.



COMMISSION REVIEW

TOTAL TRANSACTION VALUE:	\$5,000.00	COMMISSION DEDUCTIONS
ADDITIONAL FEE:	\$0.00	
FINAL FEE:	\$5,000.00	

☐ Ready For Closing

NEXT

Finalizing the Details

- 9 The Billing and Payments page is the last step for completing your transaction. Confirm that the billing contact is correct, as well as the projected dates for payment. If everything looks good, then your transaction is complete.

If you are ready to close the transaction, click the box next to "Ready For Closing". This will notify your administration team that the transaction is ready to be processed.

If you are not ready to close, simply click the "Done" button at the bottom of the page to return to your pipeline.

BILLING & PAYMENTS

Choose Billing*

3807 - Capital City Real Estate

CURRENT BILLING CONTACT

Capital City Real Estate

1234 South Street
Cary, NC 23659

MODIFY PAYMENTS

OVERVIEW

TOTAL FEE: \$5,000.00 REFERRING FIRM FEE: N/A

☐ Ready For Closing

Drag a row to change the order of the payments.

Search...

	#	% of Fee	Amount	Our Firm	Invoice Sent	Projected	
☐	1	100.00%	\$5,000.00	\$5,000.00		12/01/2022	
		100.00%	\$5,000.00	\$5,000.00			

Page 1 of 1 (1 items) < 1 > Page size: 24

BACK

DONE

**Please contact us
with any questions**

Support Team

919-568-1800

support@realcoreapps.com

www.realcoreapps.com