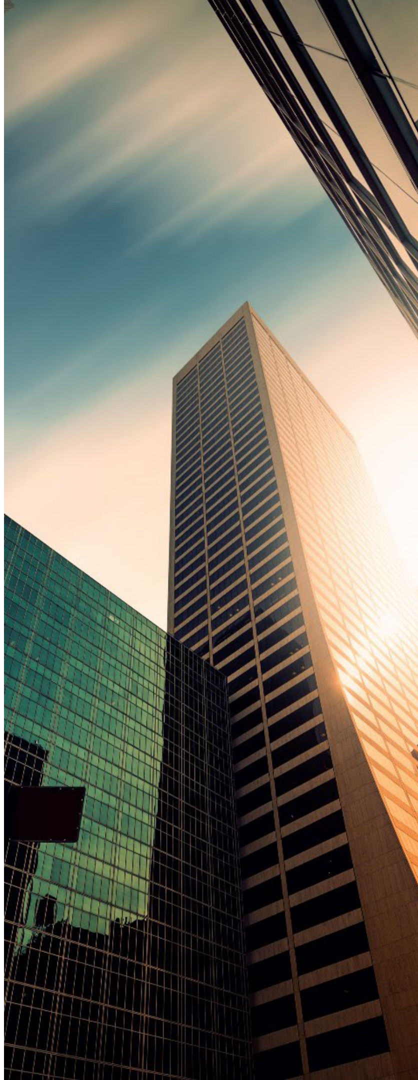
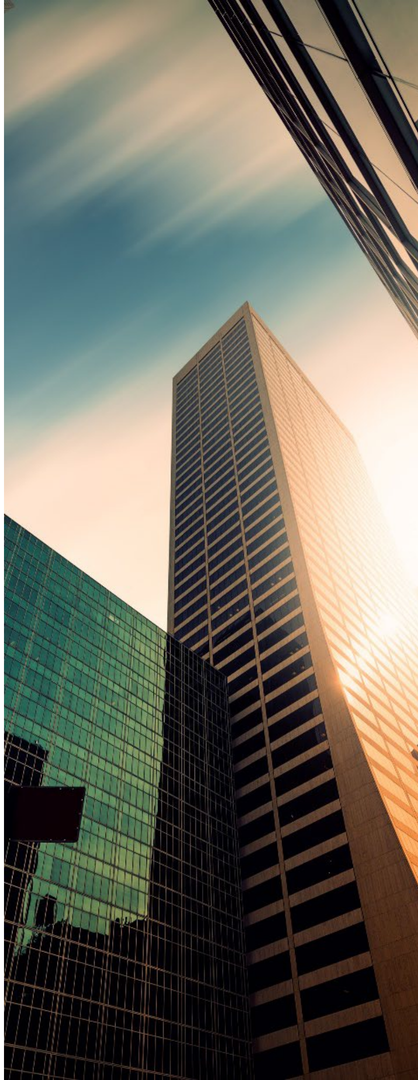
The Pipeline Process: From Beginning to End

For Agents



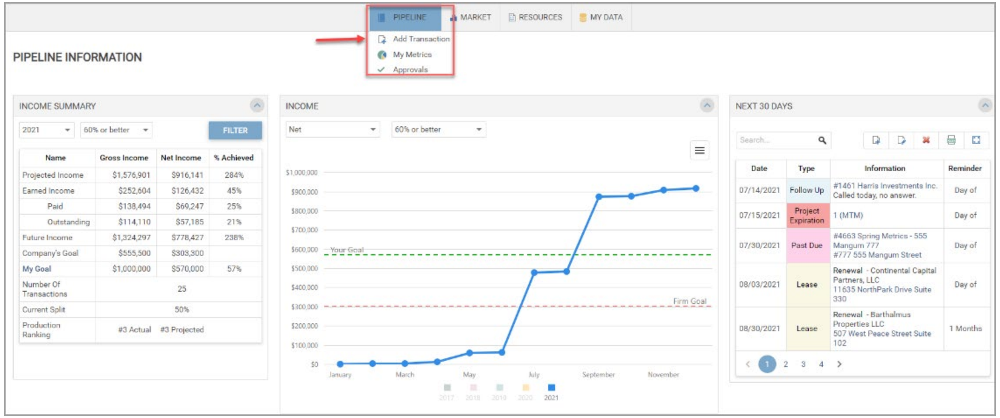
LEASES



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.



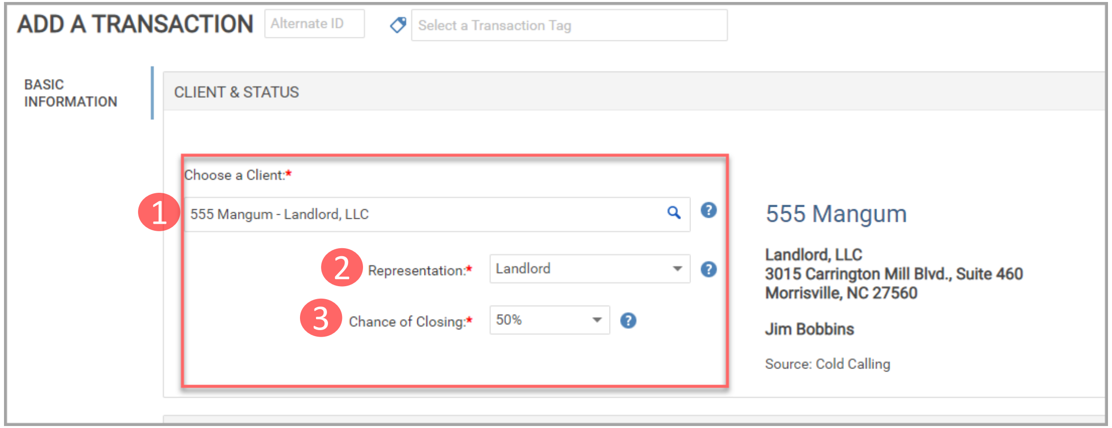
- Client and Status
- Property or Location
- Parties
- Brokerage Firms
- Team
- Commissions
- Payments

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.

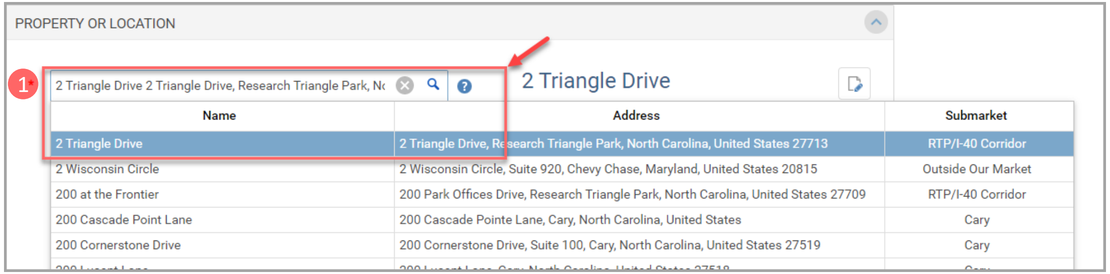
2. Using the dropdown, choose your representation. You can choose from Landlord, Tenant, Buyer, Seller, or Consulting. For this lease example we will choose “Landlord”

3. Use the dropdown to choose your Chance of Closing. You can always change this later on.

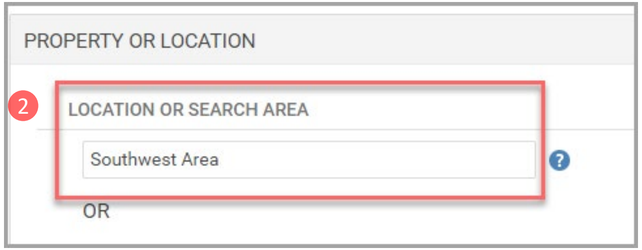


Property or Location

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.



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



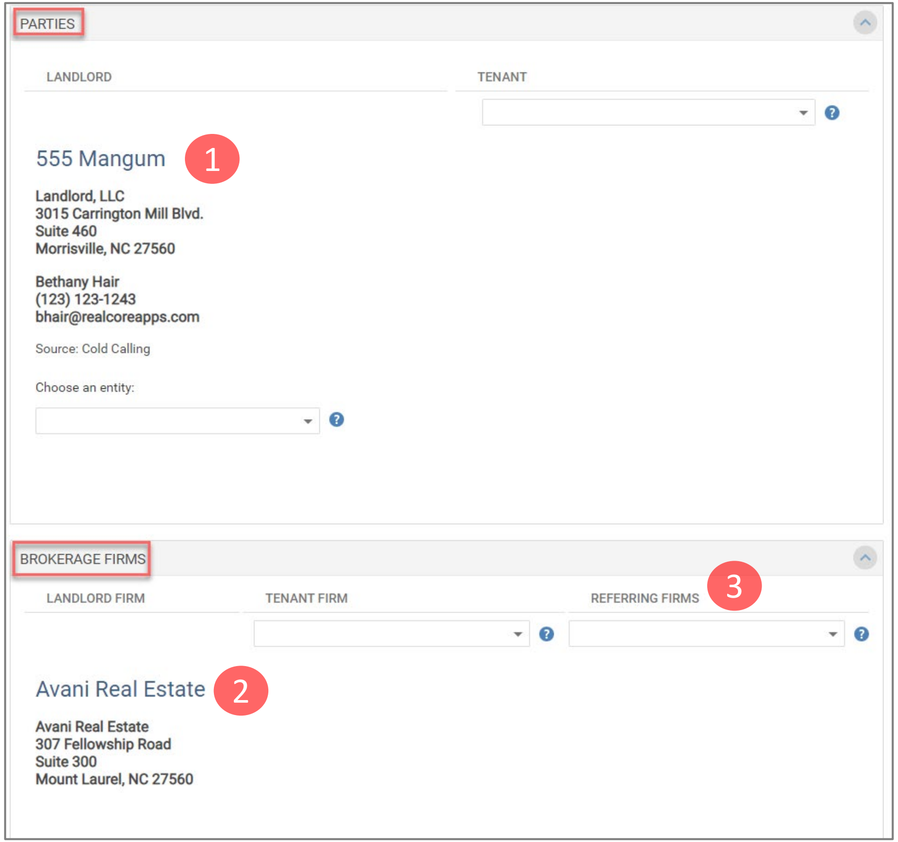
Parties & Brokerage Firms

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.

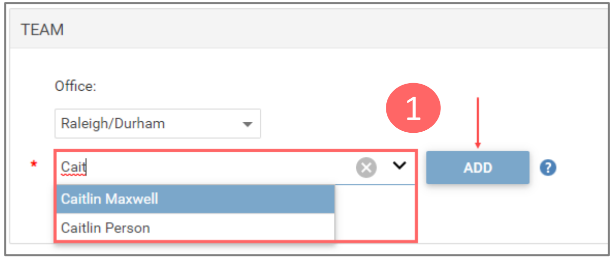


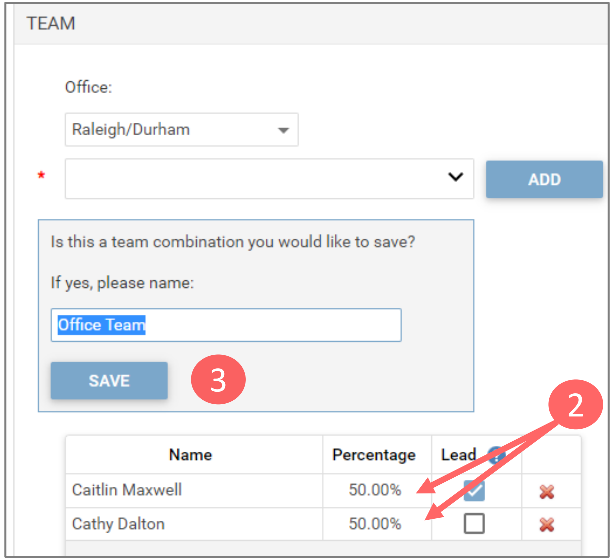
Team

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.)





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

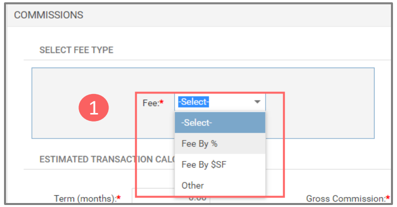
4 Total SF

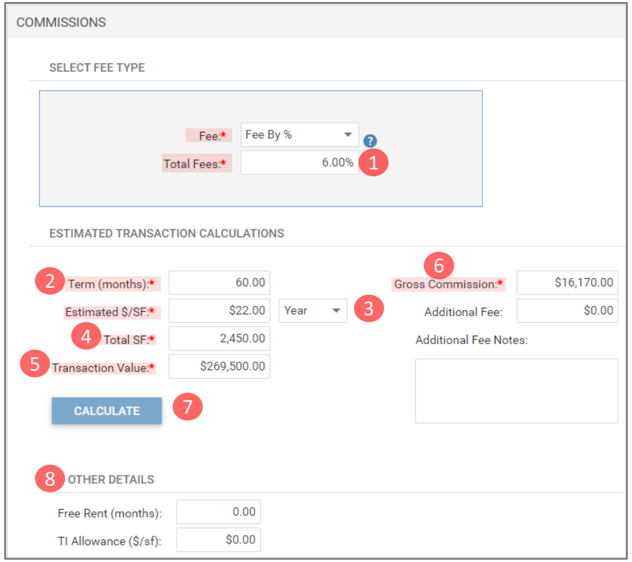
5 Transaction Value

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.

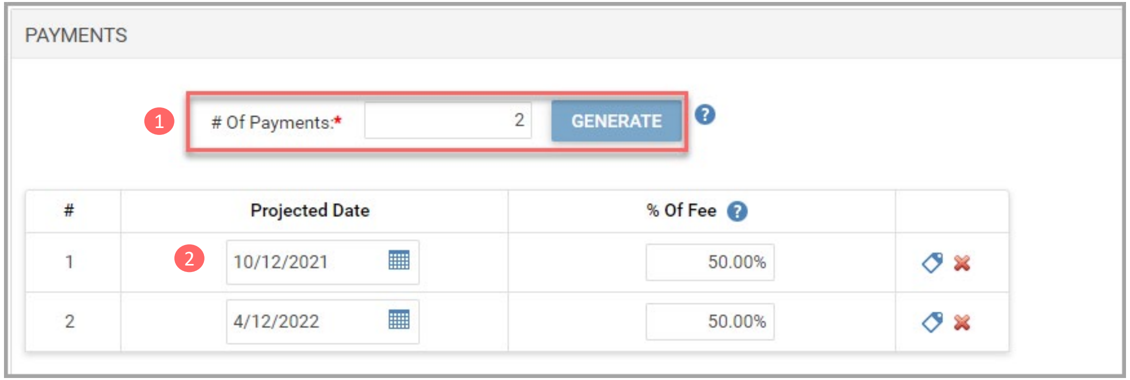




Payments

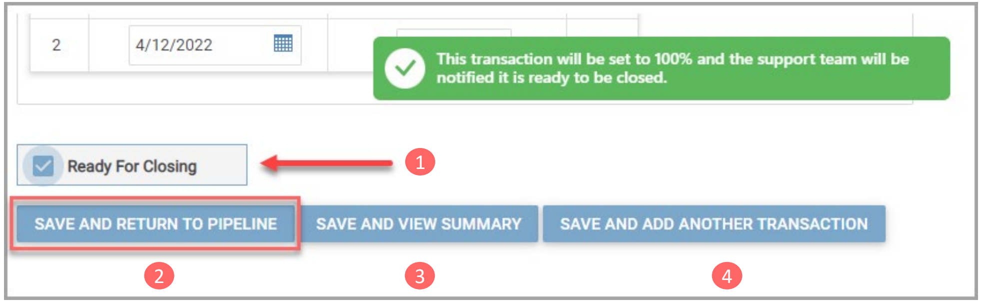
1 Add the number of payments expected in the box and then click "Generate".

2 A row will populate for each estimated pay date. You can always change these dates later.



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.

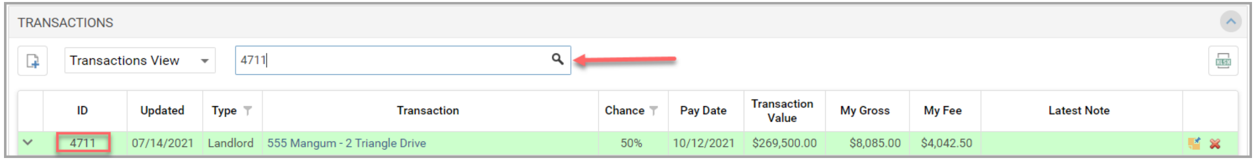
You can also choose to:

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.

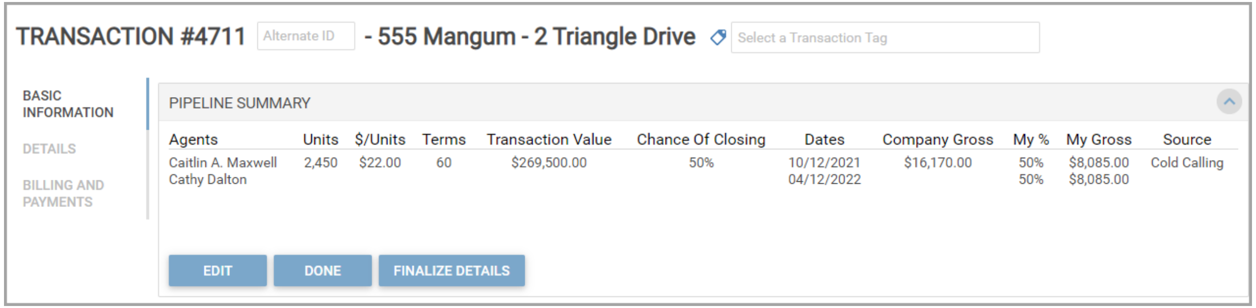
Editing a Transaction

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.



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.)



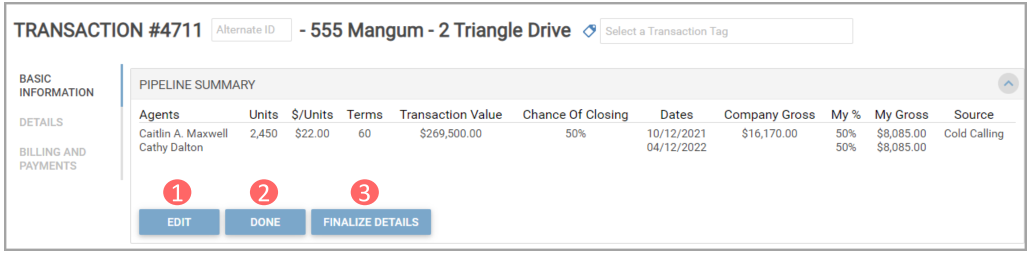
Editing a Transaction

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.

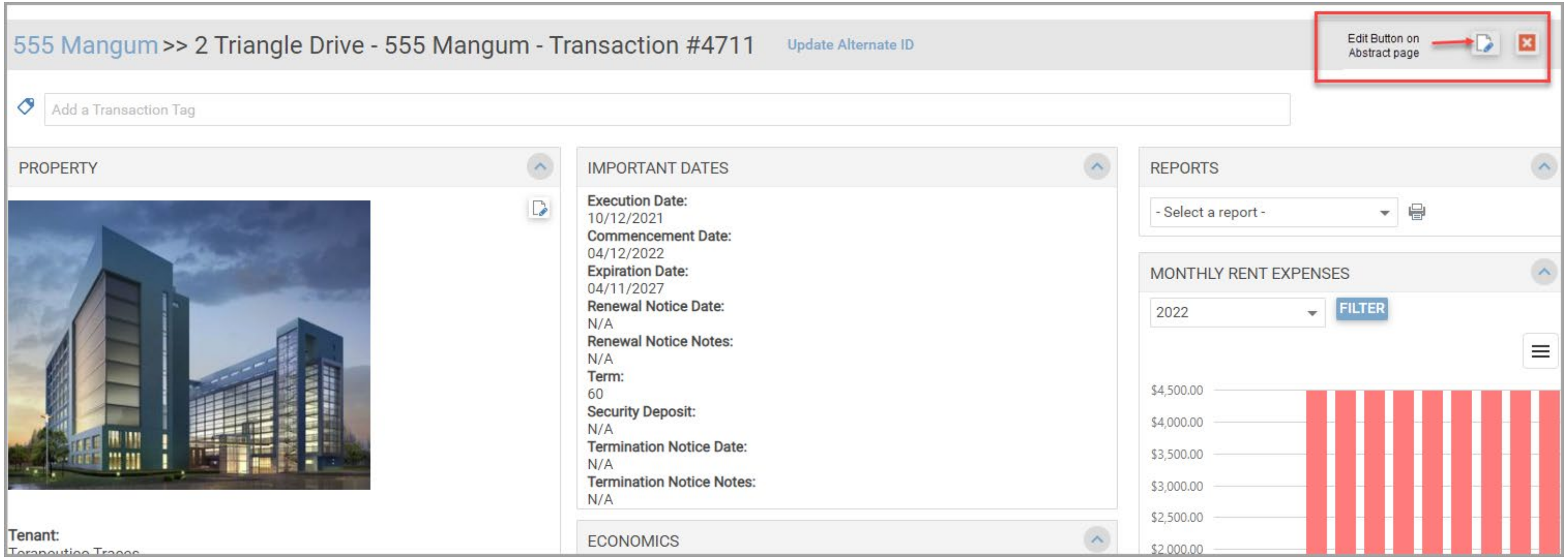
3. Finalize Details - The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For leases this includes things like official parties, the rent schedule, estimates, or other specific pertinent details. For sales this would include an executed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



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.

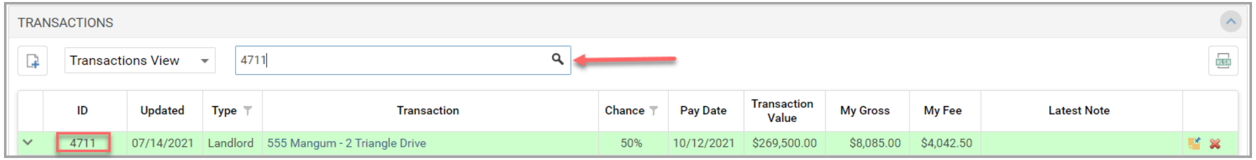
Editing a Transaction

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.

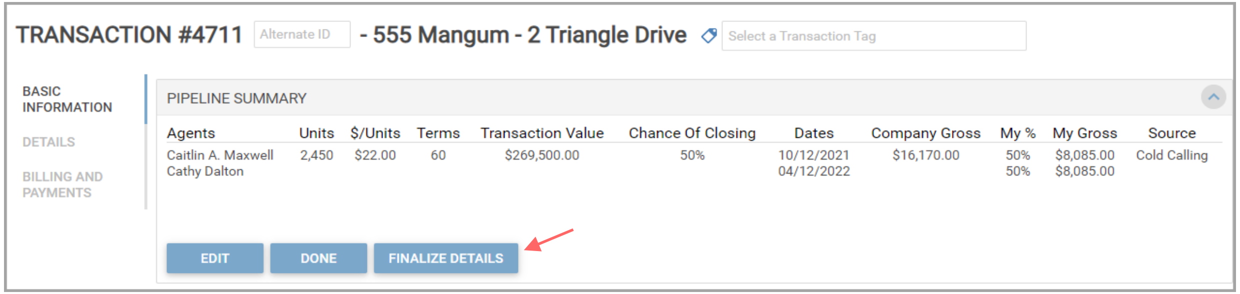


Finalizing the Details

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

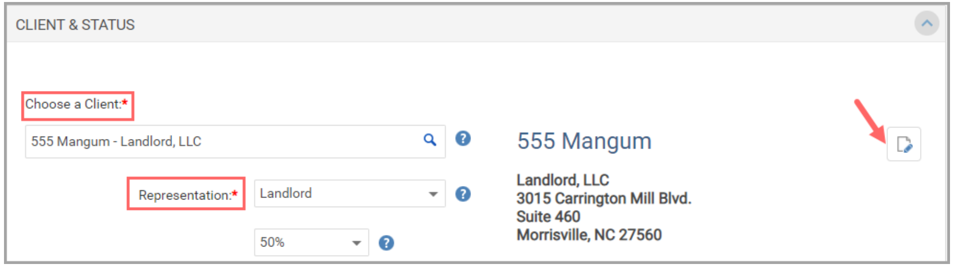


2 The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For leases this includes things like official parties, the rent schedule, estimates, or other specific pertinent details. For sales this would include an executed contract, or if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

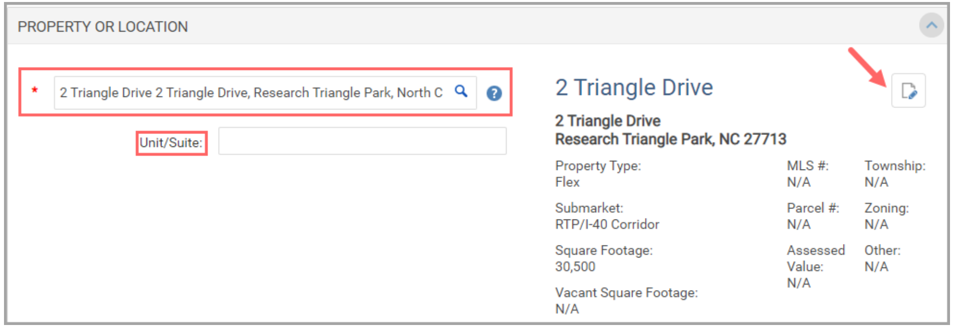


Finalizing the Details

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.

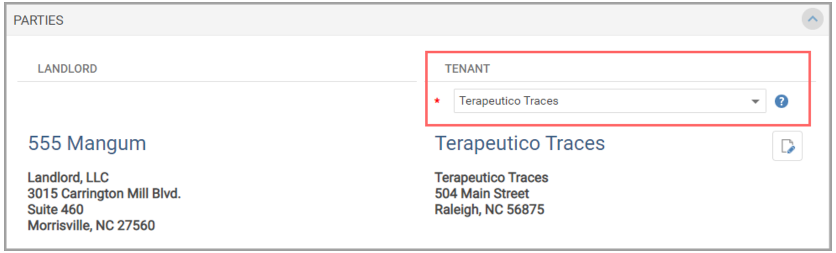


4 Add or confirm the property. You can also add a Unit/Suite, or edit the property's details by clicking on the edit icon to the right.

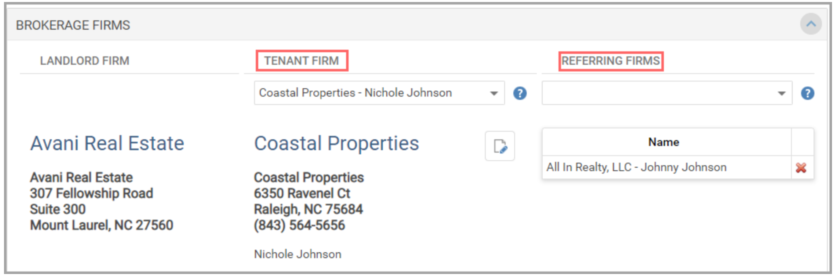


Finalizing the Details

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



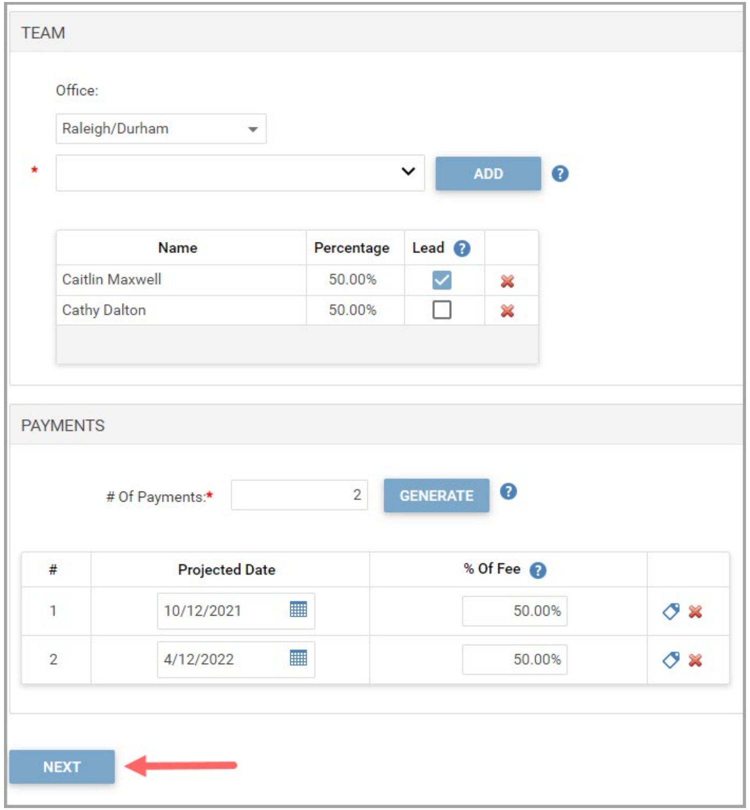
6 Your firm is automatically listed for the appropriate representation in the Brokerage Firms section. Here you can add an outside firm and/or referring firm if applicable.



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.

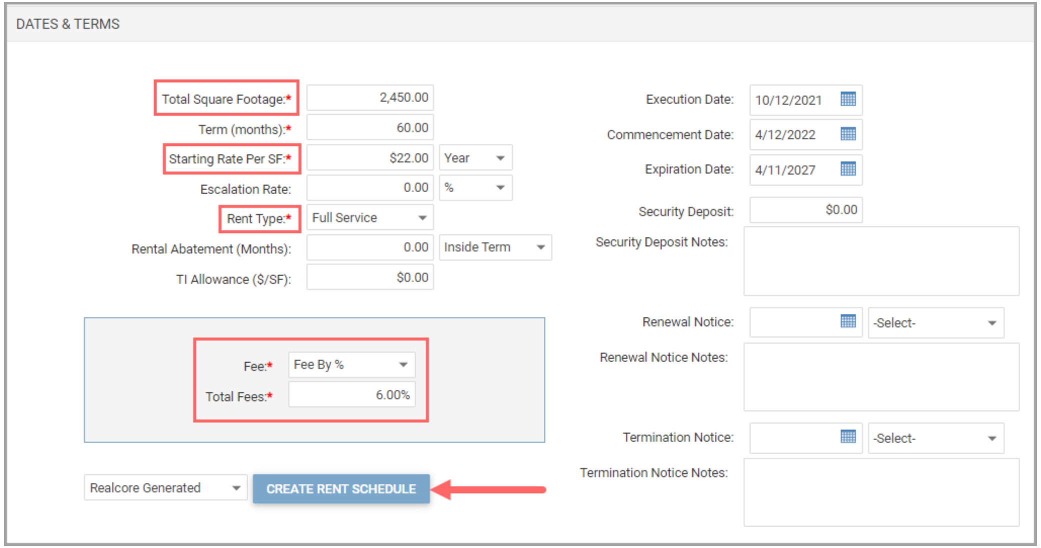
When everything looks correct on the Basic Information page, click the Next button to proceed to the Details page.



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.



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.

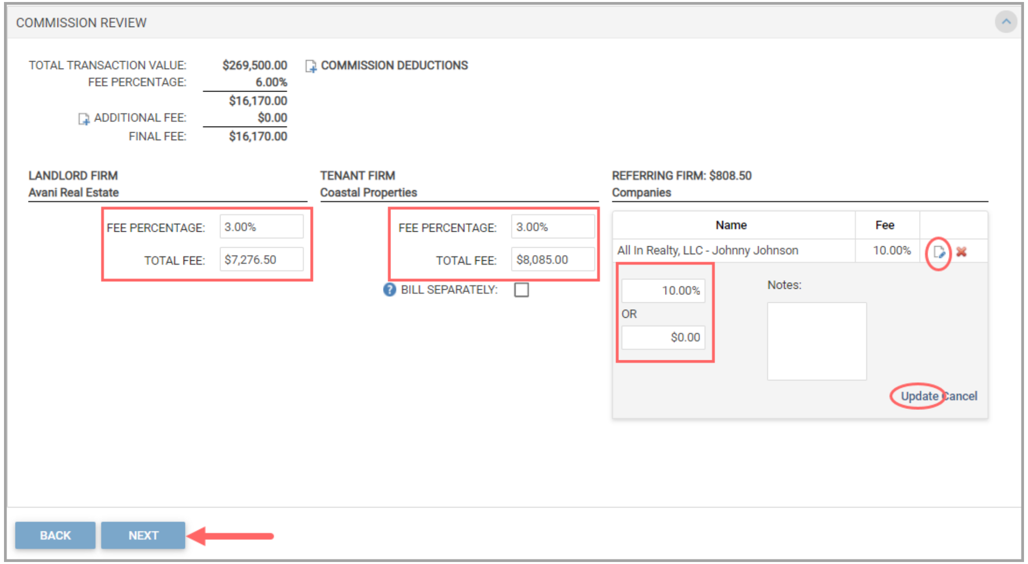
RENT DETAILS

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.

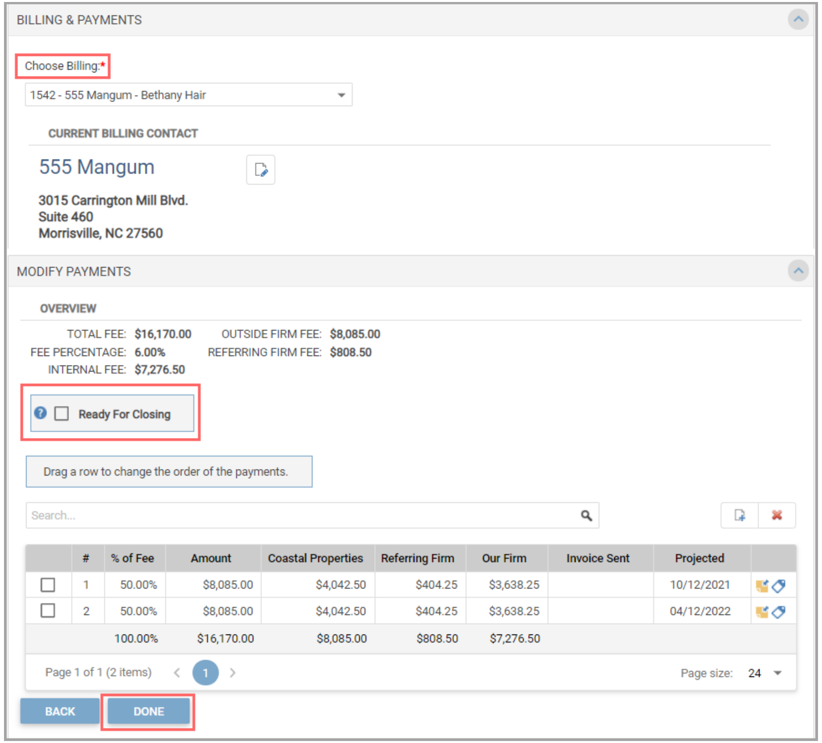


Finalizing the Details

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](#).



Dual Agency Deals

Starting the Transaction in Your Pipeline

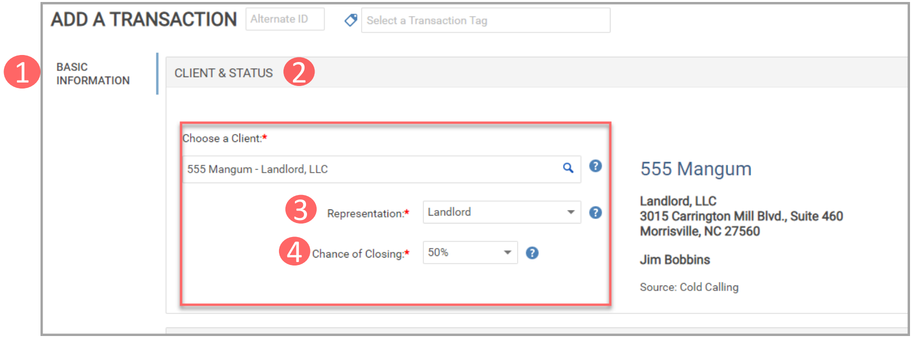
When you are participating in a dual agency deal with different agents from the same firm on both sides, you will enter in your side of the deal into your pipeline by completing the Basic Information page only.

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.

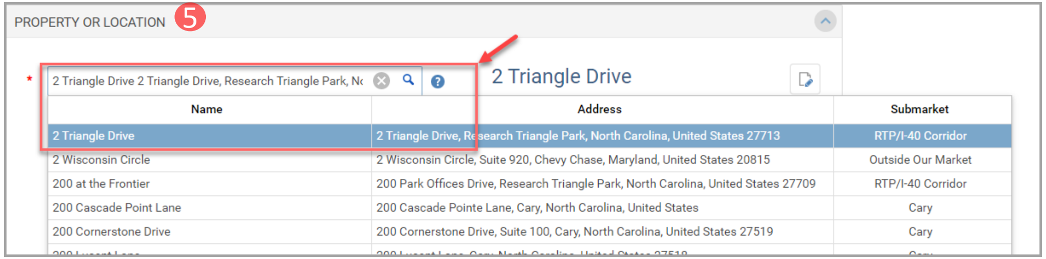
4. Use the dropdown to choose your Chance of Closing. You can always change this later.

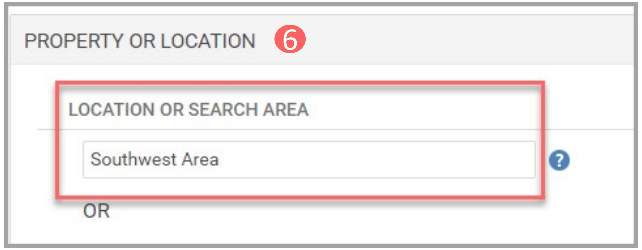


Dual Agency Deals

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.





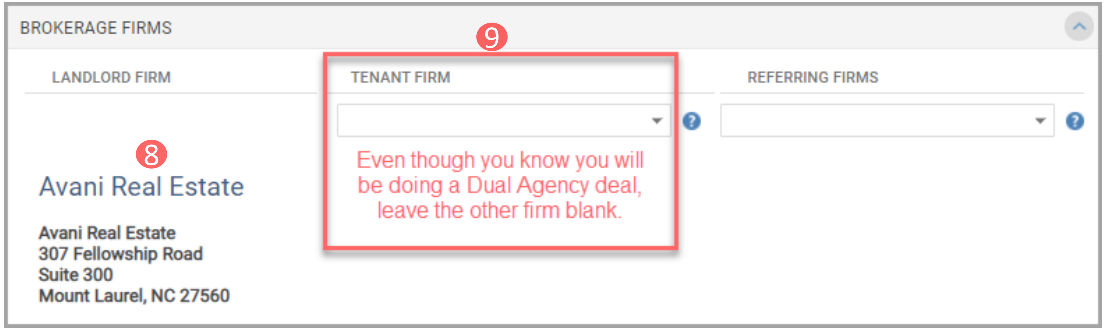
Dual Agency Deals

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.

Dual Agency Deals

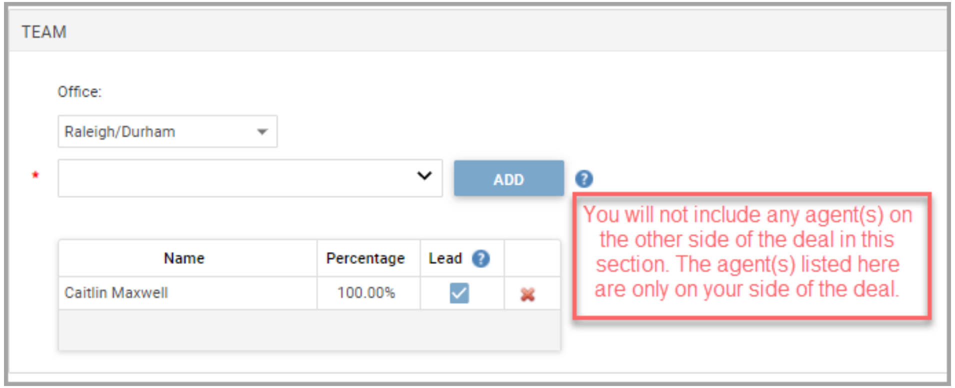
8 **Brokerage Firms -** Your firm will show up automatically as Landlord/Seller Firm or Tenant/Buyer Firm, depending on what side of the deal you are on for this type of the transaction. For the beginning stages of the transaction, you will not add your firm to the other side of the deal. Leave this 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.



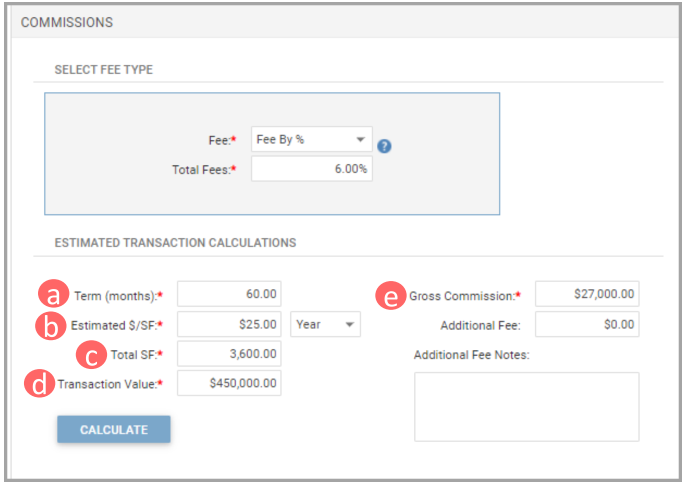
Dual Agency Deals

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.*



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

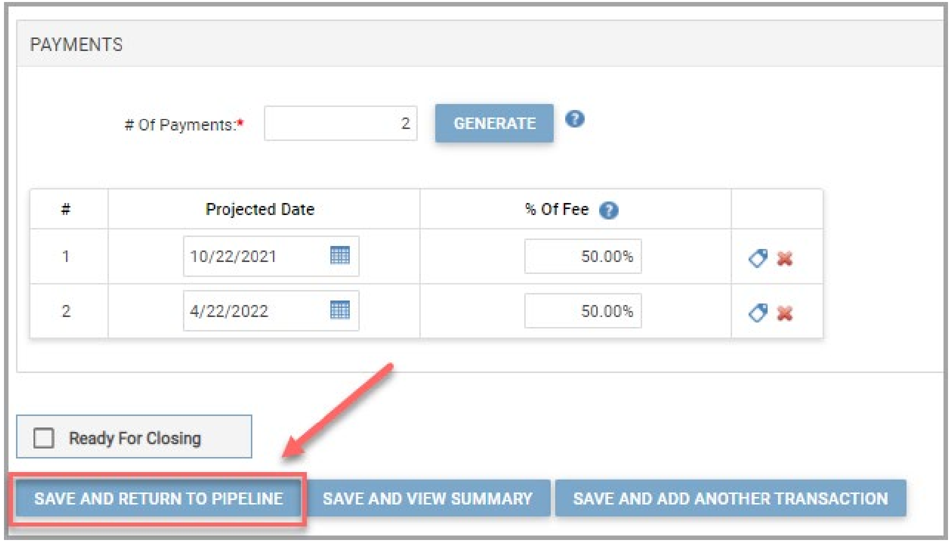


This information does not have to be exact. These are estimated numbers that you will be able to change later in the deal. These numbers do not have to match the other side of the deal, either.

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.



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.

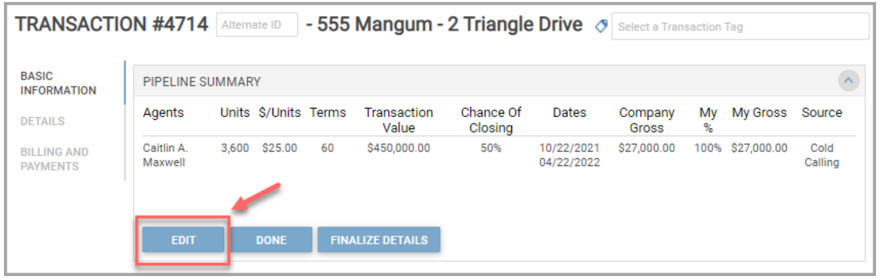
Dual Agency Deals

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.



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).

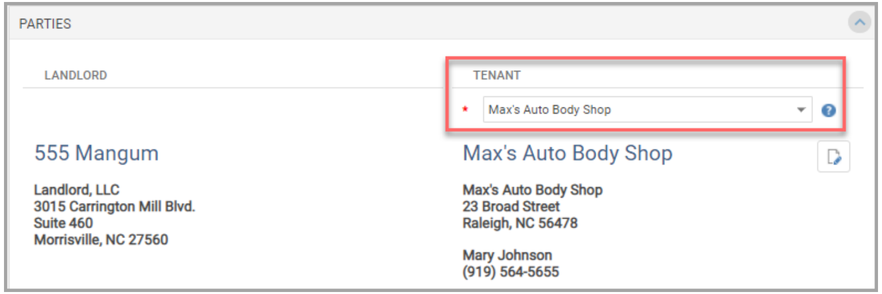
- If you are the agent on the Tenant/Buyer side of the deal, you will not need to finalize details of the deal, as the agent on the Landlord/Seller side will do this. You will be able to see the final details once the two sides have been linked.

- 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.

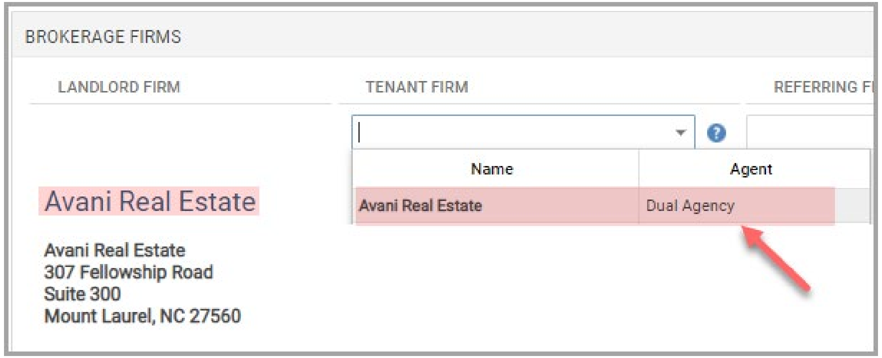
Dual Agency Deals

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.



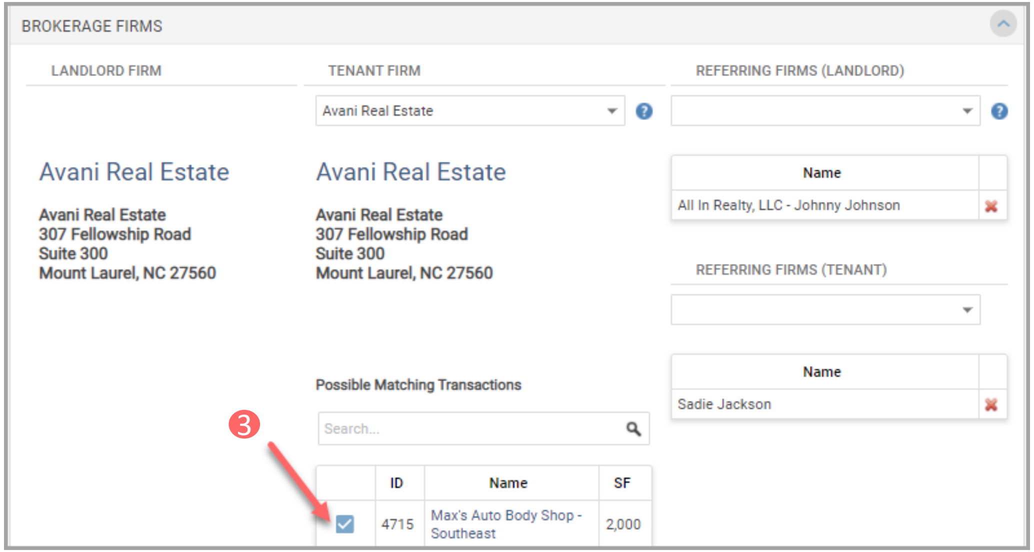
2. In the Brokerage Firms section, the Landlord/Seller party has been auto filled with your firm. To make this a dual agency deal, you will click on the dropdown button, and select “Dual Agency” next to your firm’s name. This will be the first option on the dropdown menu.



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.



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.

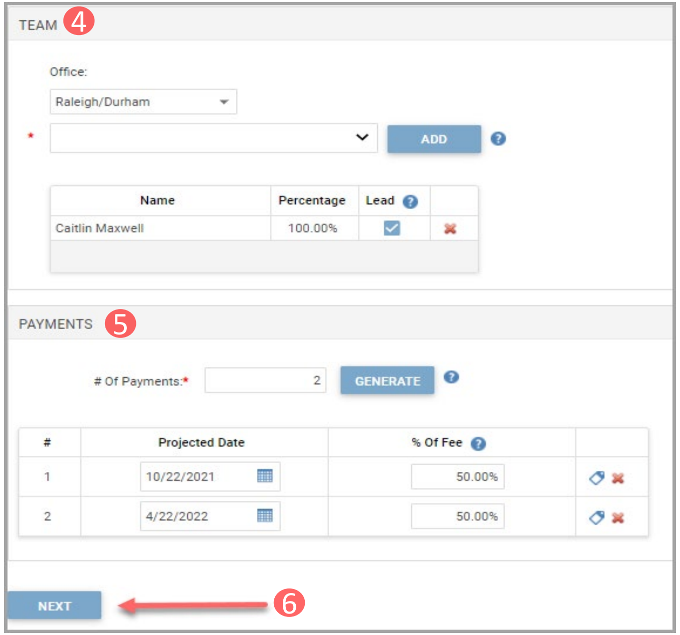
Dual Agency Deals

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.

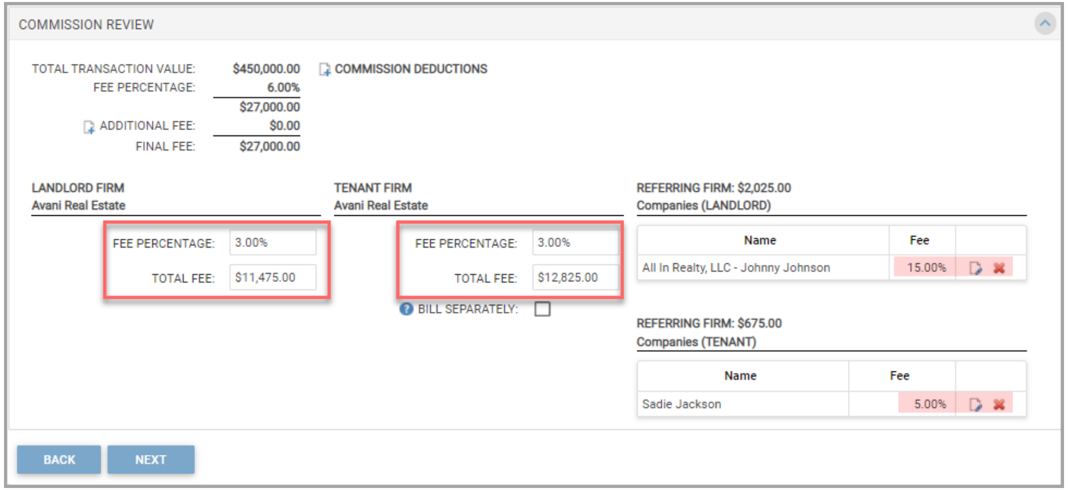


Dual Agency Deals

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”.



Dual Agency Deals

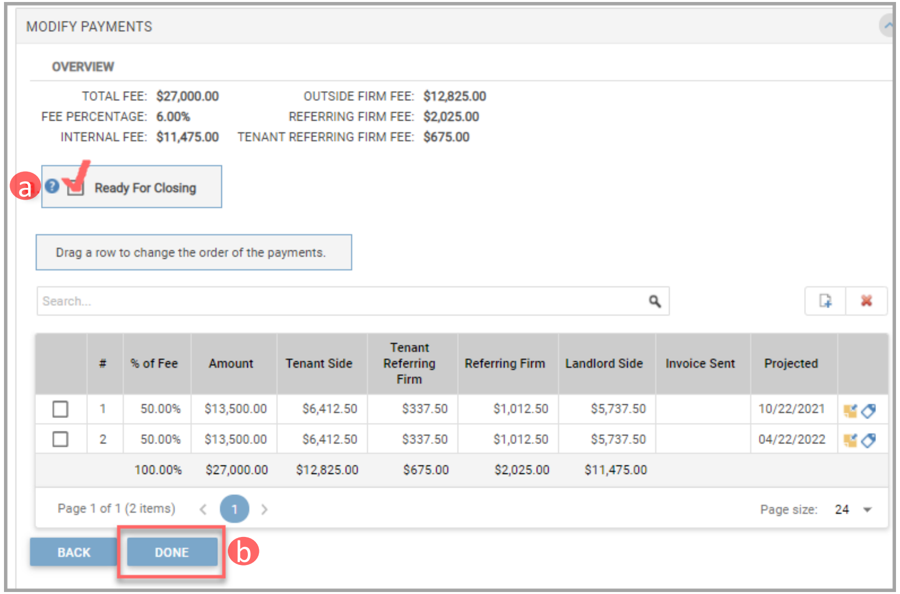
Preparing the Transaction to be Closed

8 The final page is the Billing and Payments page. Review the information and do one of the following:

a) 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.

b) Just click “Done” to return to your pipeline page.

c) If you can close your own deals, you will also be able to see the Internal Review page before clicking “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

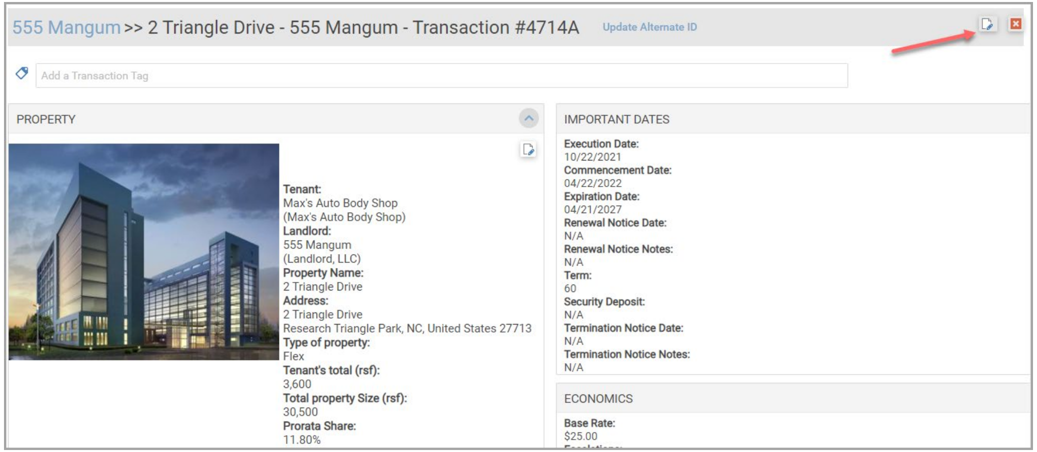
4714B	07/22/2021	Tenant	Max's Auto Body Shop - Southeast	40%	10/22/2021	$450,000.00	$15,900.00	$3,847.50

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.



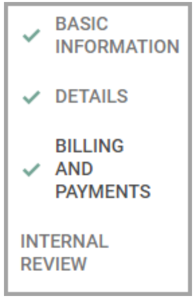
Dual Agency Deals

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	

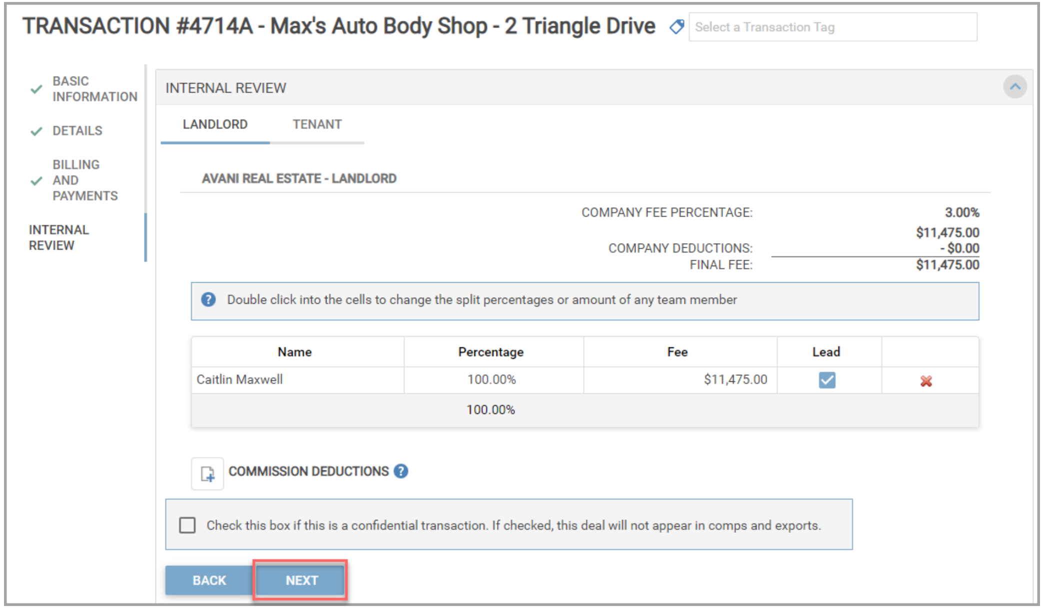
2. Review all the information on the Basic Information, Details, and Billing and Payments pages. You will still be able to make any necessary changes. However, keep in mind these will also reflect on the Tenant/Buyer side (B Side) of the transaction.



Dual Agency Deals

Closing a Dual Agency Transaction (for Agents)

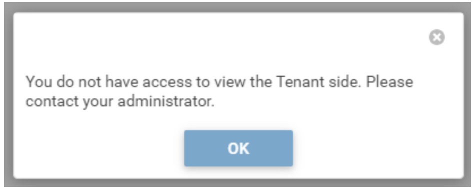
3 The Internal Review page is the last page when closing a transaction. You will only be able to see your side of the transaction on the Internal Review page. (If you need assistance regarding splits, please see your Realcore administrator.) Confirm all the information is correct and click “Next”.



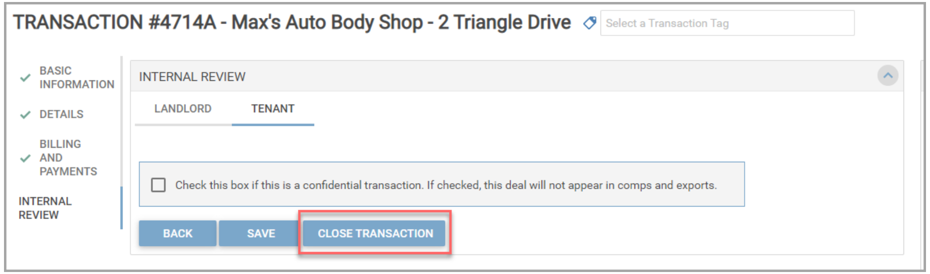
Dual Agency Deals

Closing a Dual Agency Transaction (for Agents)

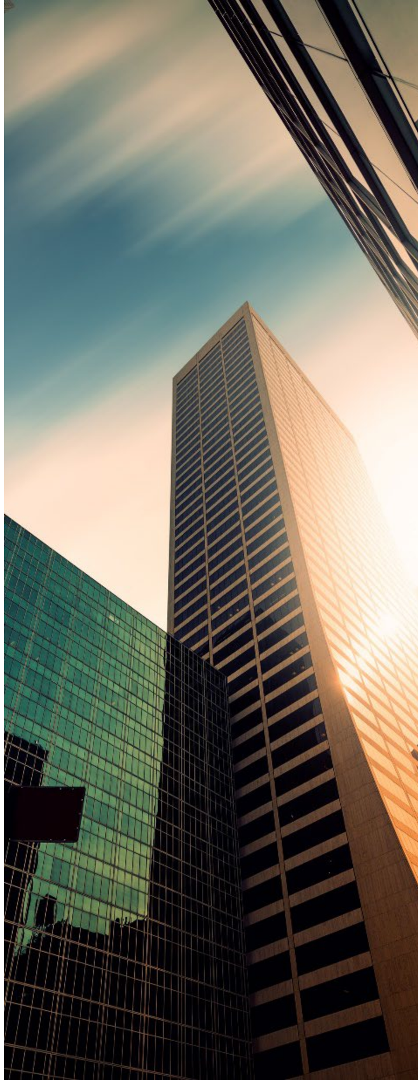
4 After clicking “Next”, you may get a message that says “You do not have access to view the Tenant/Buyer side. Please contact your administrator”. This message shows to agents who do not have the permissions to see the other side’s commission splits. Click “OK”.



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.

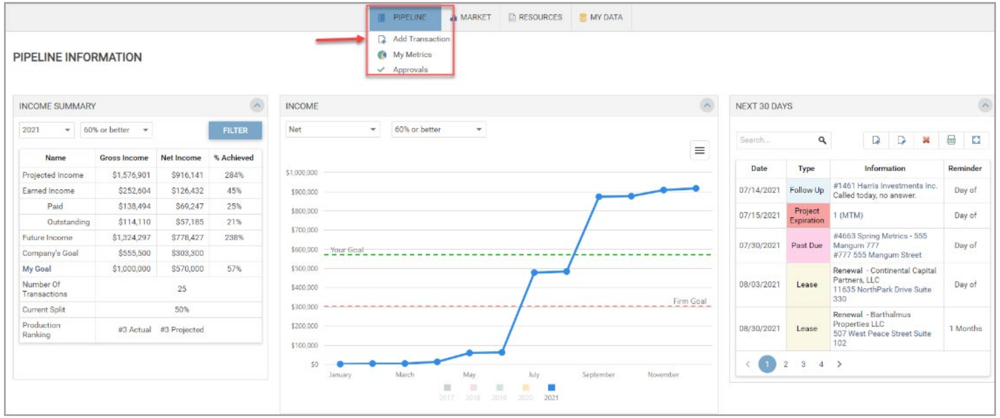


SALES



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.

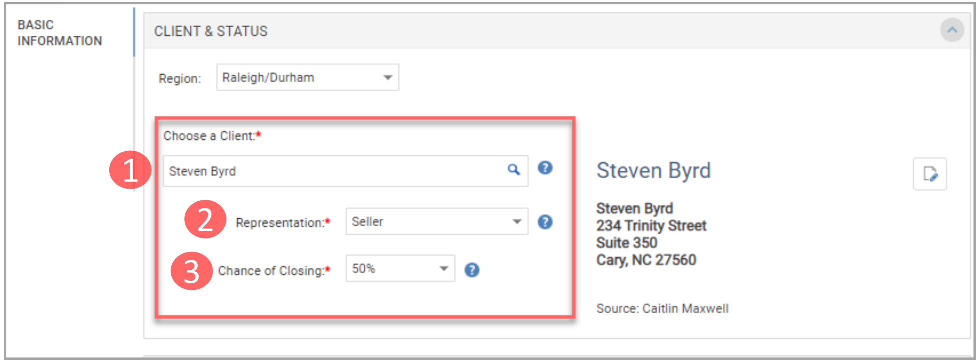
- Client and Status
- Property or Location
- Parties
- Brokerage Firms
- Team
- Commissions
- Payments

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.

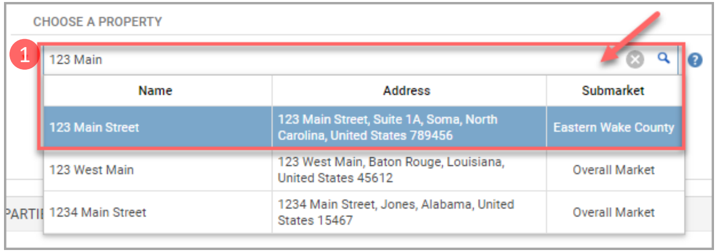
2 Using the dropdown, choose your representation. You can choose from Landlord, Tenant, Buyer, Seller, or Consulting. For this sale example we will choose "Seller".

3 Use the dropdown to choose your Chance of Closing. You can always change this later on.

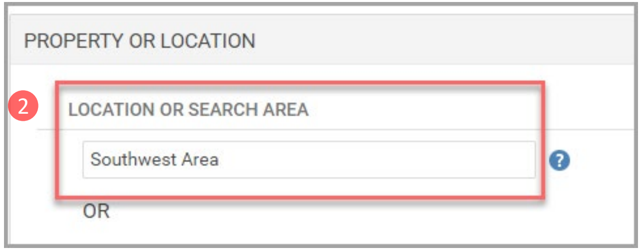


Property or Location

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.



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



Parties & Brokerage Firms

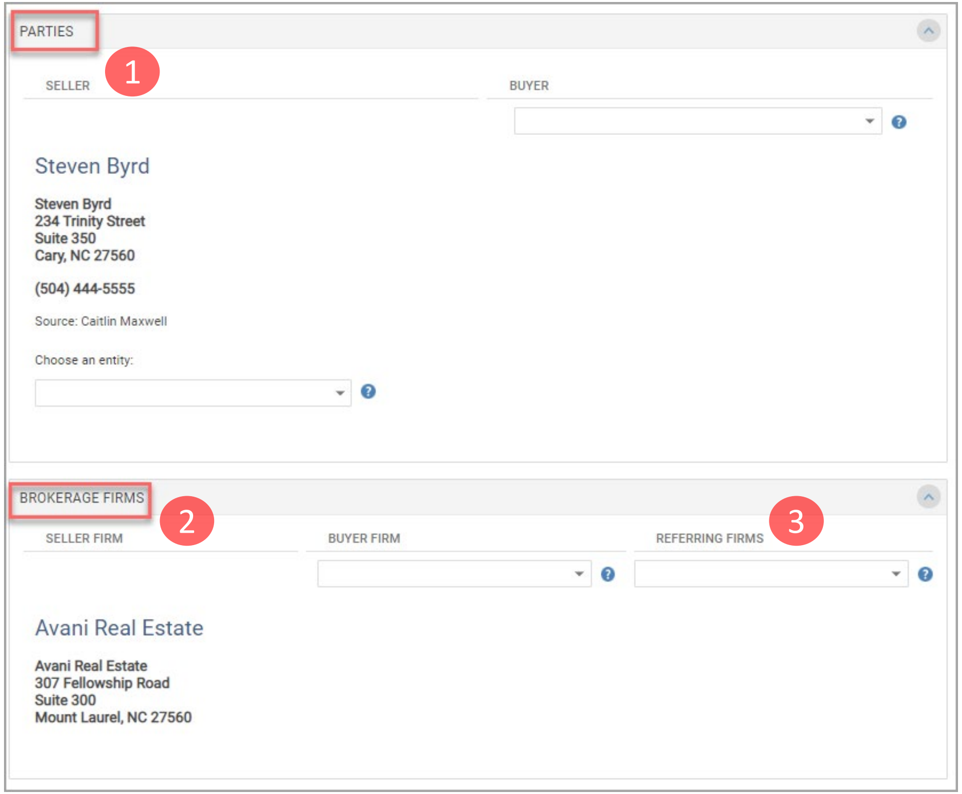
Parties

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.

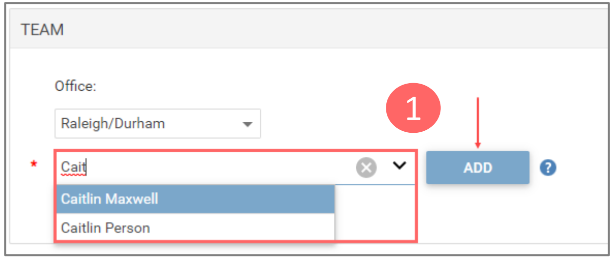


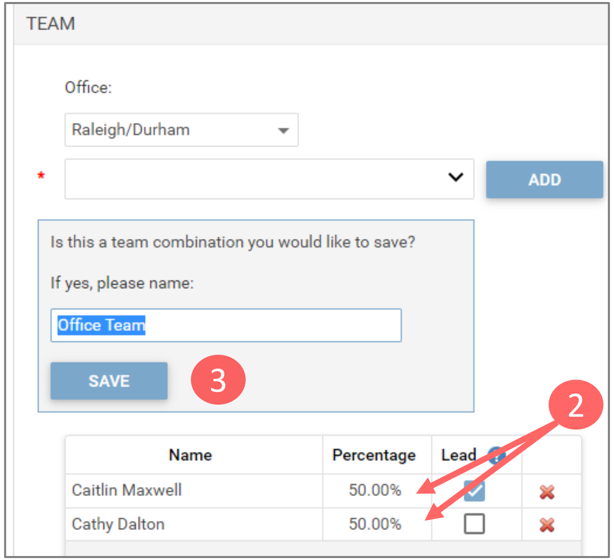
Team

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.)





Commissions

1 Enter your Total Fee percentage. This information can be changed later. The, enter the following information:

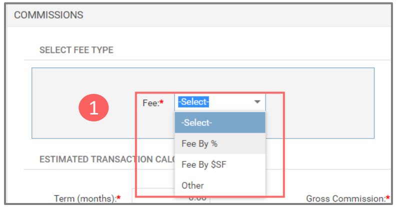
2 Estimated $/SF

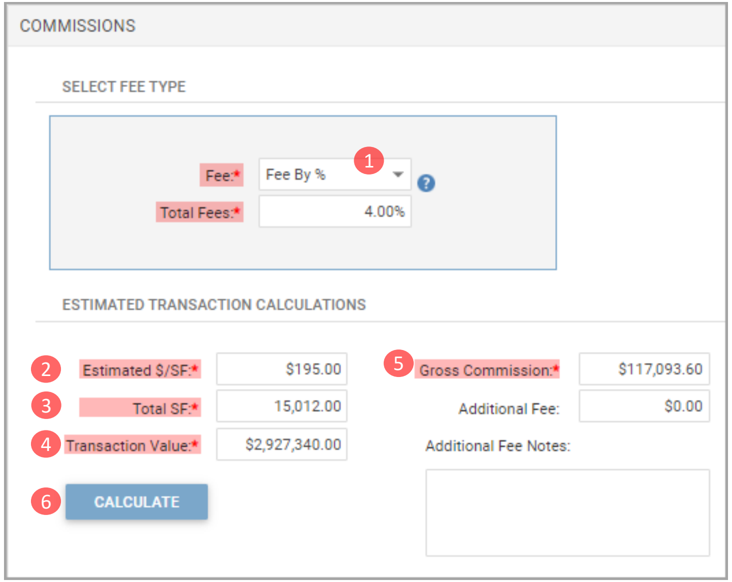
3 Total SF

4 Transaction Value

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".

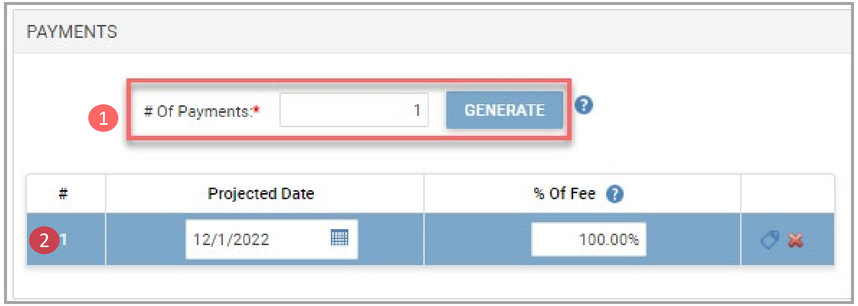




Payments

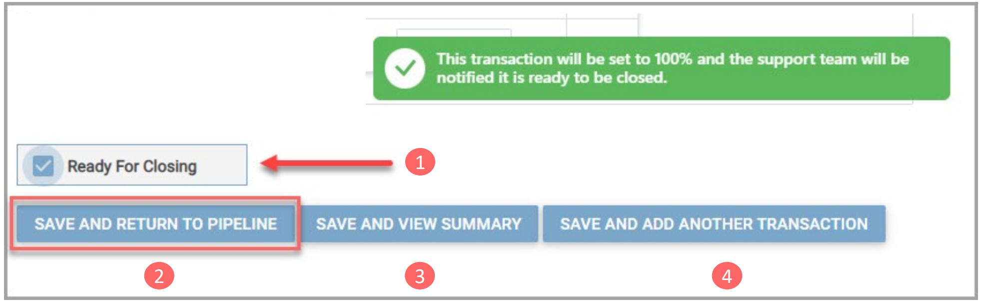
1 Add the number of payments expected in the box and then click "Generate".

2 A row will populate for each estimated pay date. You can always change these dates later.



Saving the Basic Information of a Deal

1 If you <u>do not</u> 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.

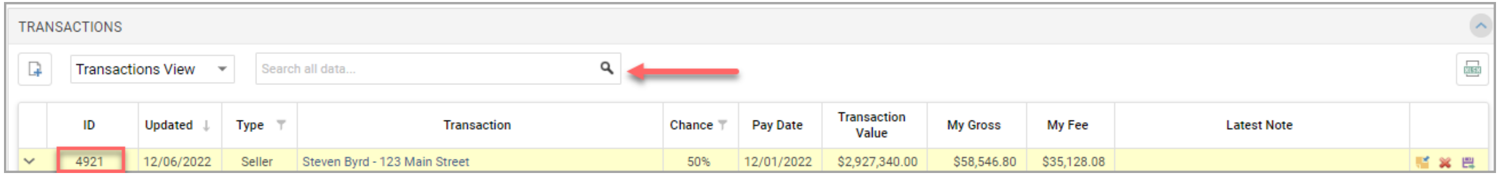
You can also choose to:

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.

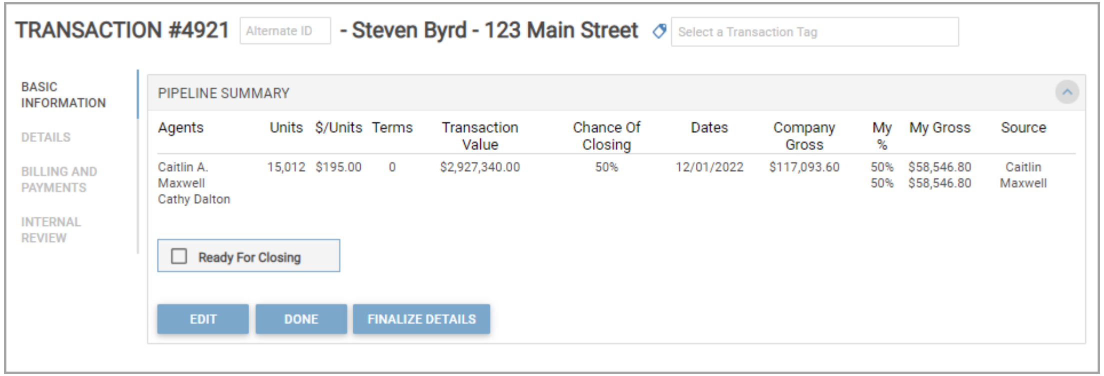
Editing a Transaction

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.



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

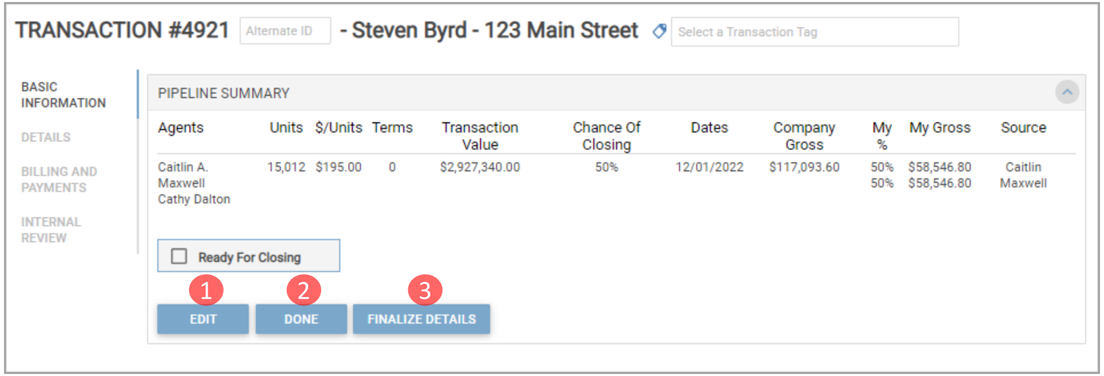
(If your screen does not look like the image below, please go to Page 12.)



Editing a Transaction

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

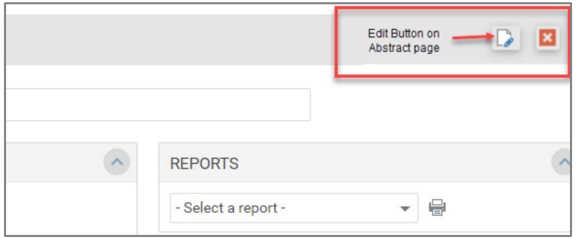
1. Edit - The Edit button allows you to edit the Basic Information of the deal. This is only the information that you entered when first adding the transaction to your pipeline.
2. Done – The Done button simply returns you to your Pipeline page.
3. Finalize Details - The Finalize Details button allows 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.



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.

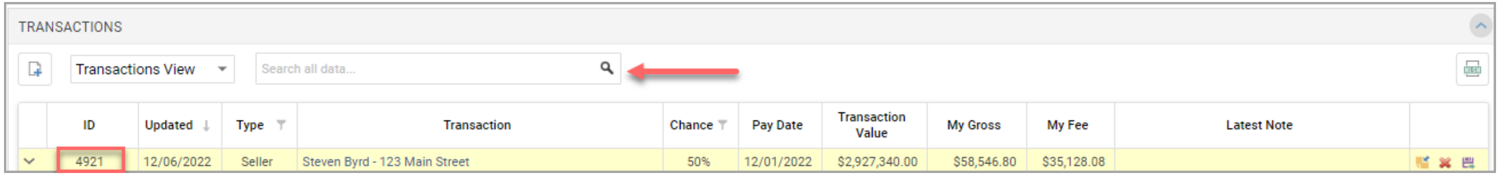
Editing a Transaction

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.

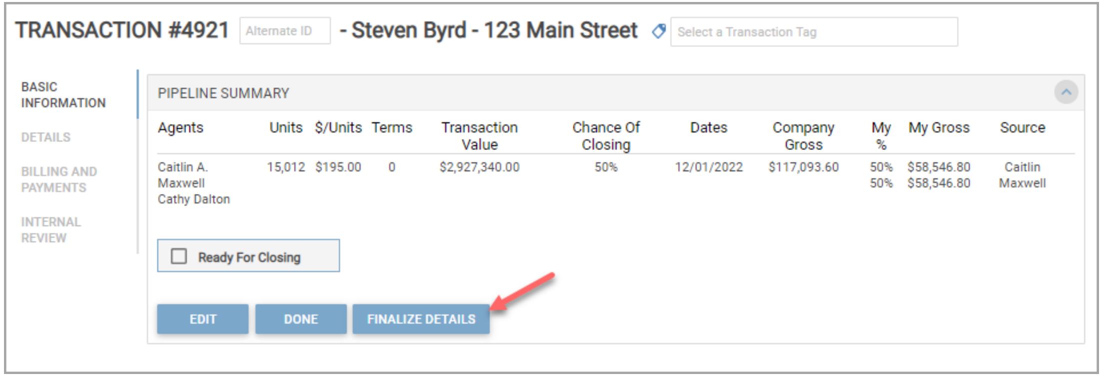


Finalizing the Details

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

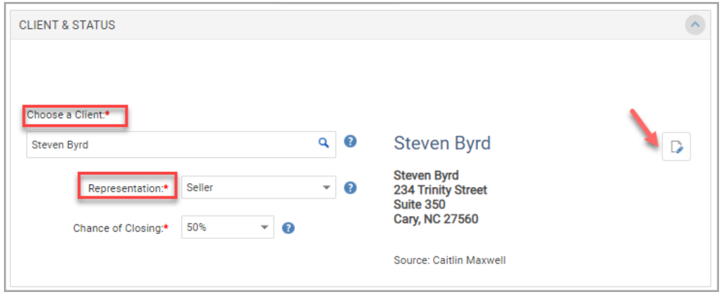


2 The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For sales this would include an executed contract, or if you want to add escrow or critical date information. Click the Finalize Details button when you have this information.

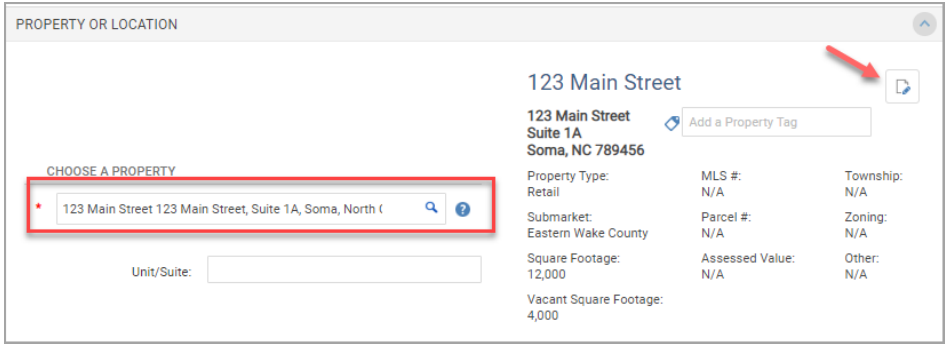


Finalizing the Details

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.

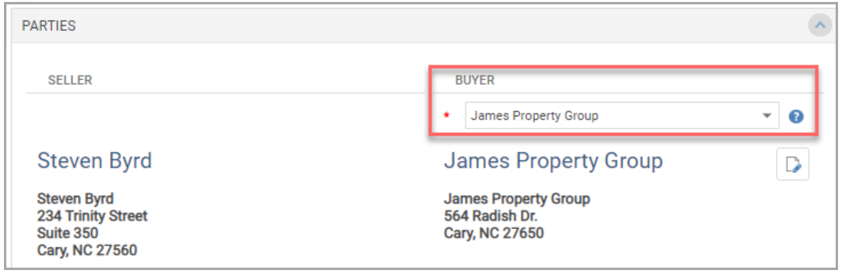


4 Add or confirm the property. You can also edit the property's details by clicking on the edit icon to the right.

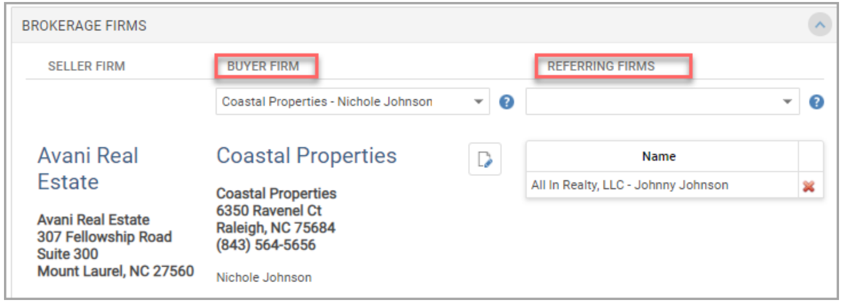


Finalizing the Details

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.



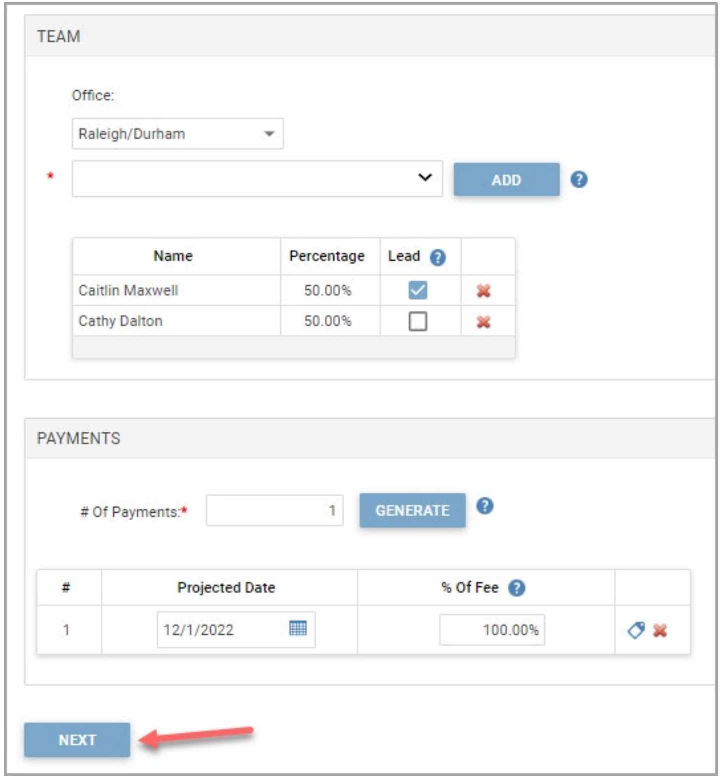
6 Your firm is automatically listed for the appropriate representation in the Brokerage Firms section. Here you can add an outside firm and/or referring firm if applicable.



Finalizing the Details

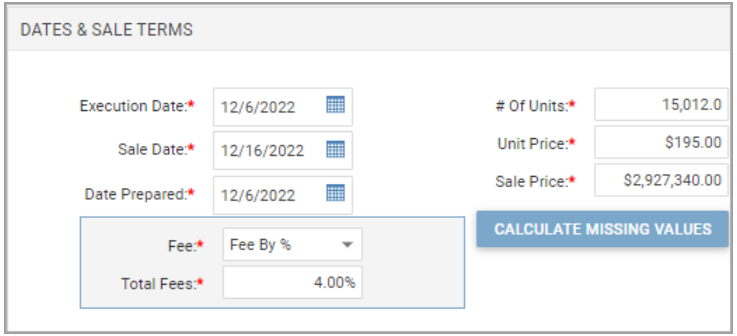
7 The information in the Team and the Payments section is the same as it was when you initially entered the deal. You can change this information at any point before closing out the transaction.

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



Finalizing the Details

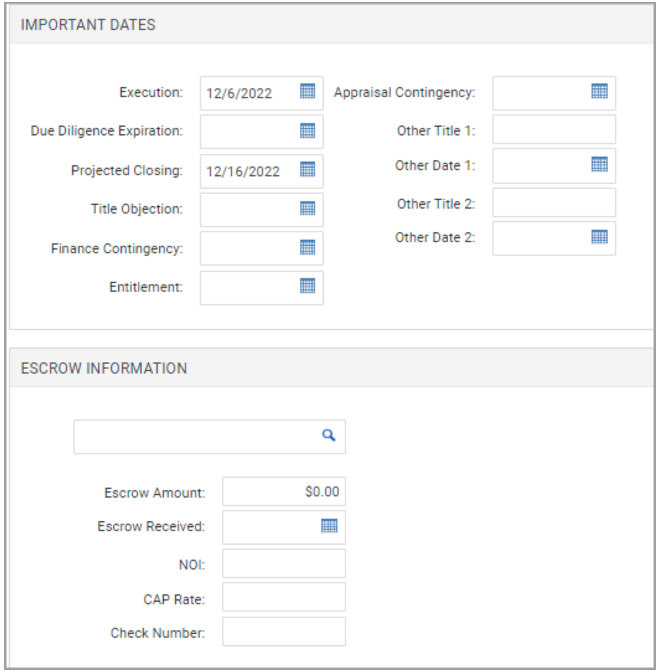
8 The Dates and Sale Terms section of the Details page is where you will input specific details of the sale. The Execution Date, Sale Date, Date Prepared, # of Units, Unit Price, Sale Price, Fee, and Total Fees are all required information.



Finalizing the Details

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

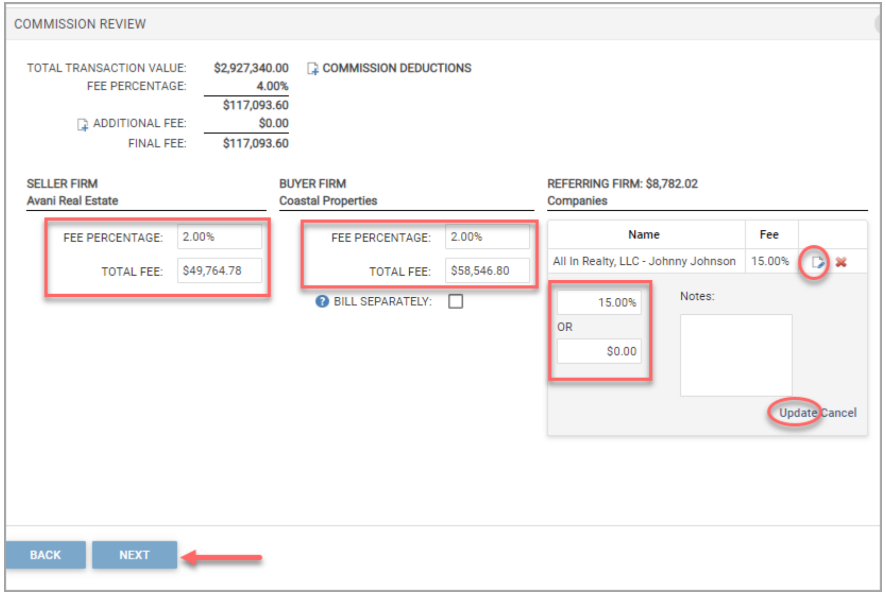
In the Important Dates section, the Execution date and Projected Closing will automatically populate based on the information entered in the Dates & Sale Terms section.



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.



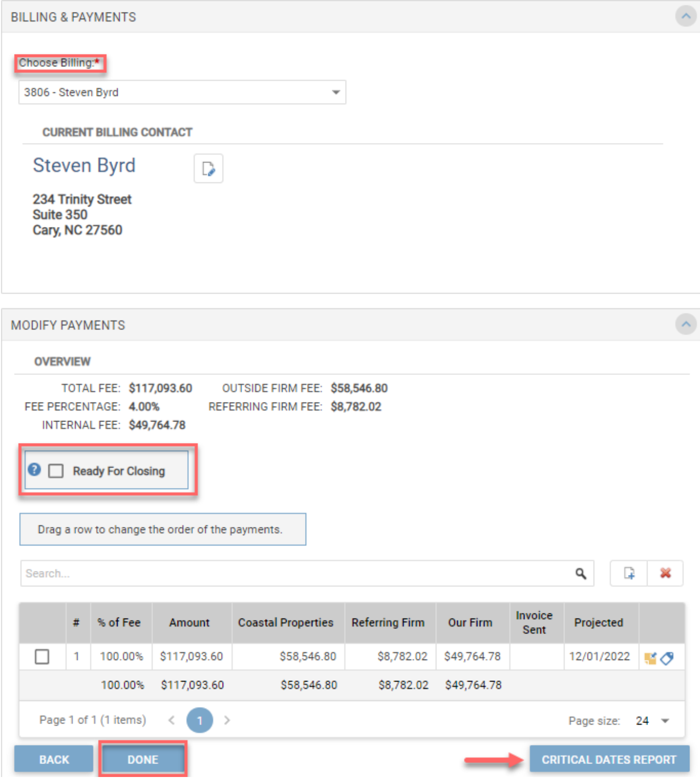
Finalizing the Details

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.

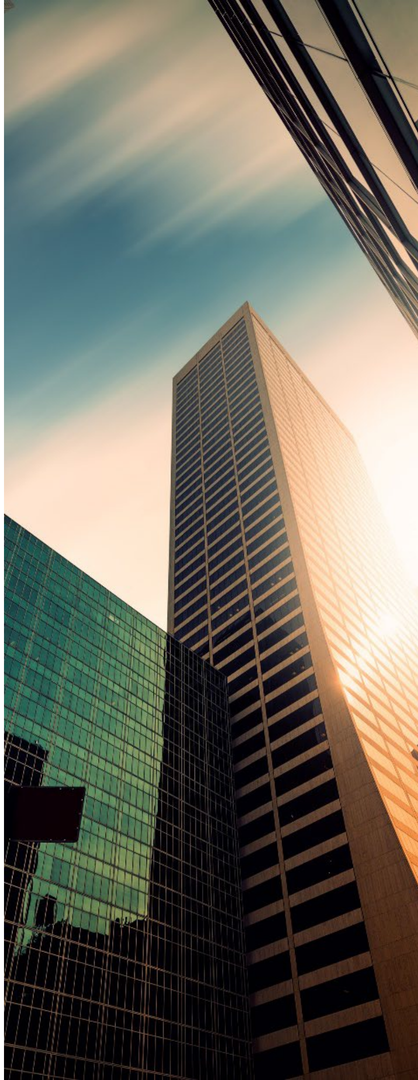
If you are ready to close the transaction, click the box next to "Ready For Closing". This will notify your administration team that the transaction is ready to be processed.

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.

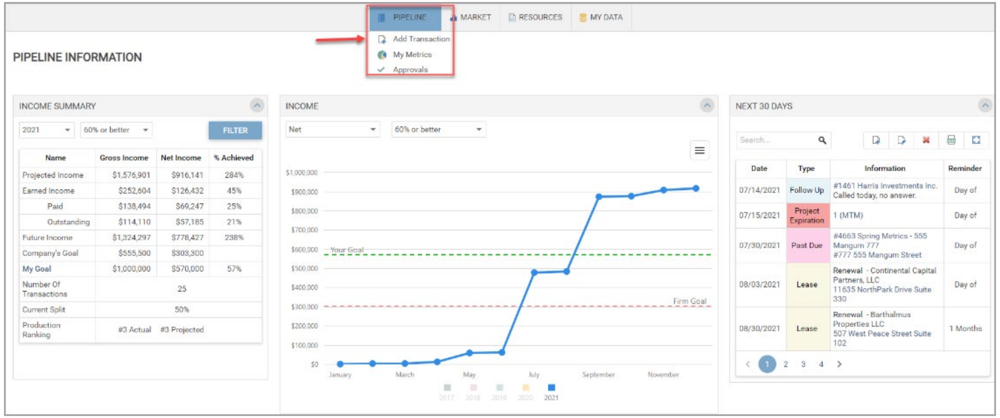


CONSULTING



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.

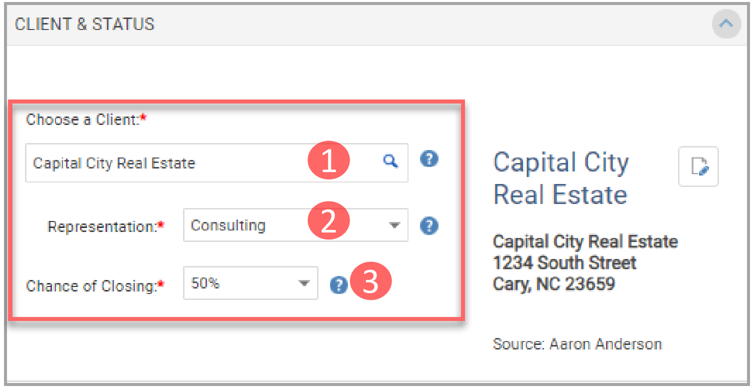
- Client and Status
- Property or Location
- Brokerage Firms
- Team
- Commissions
- Payments

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”.

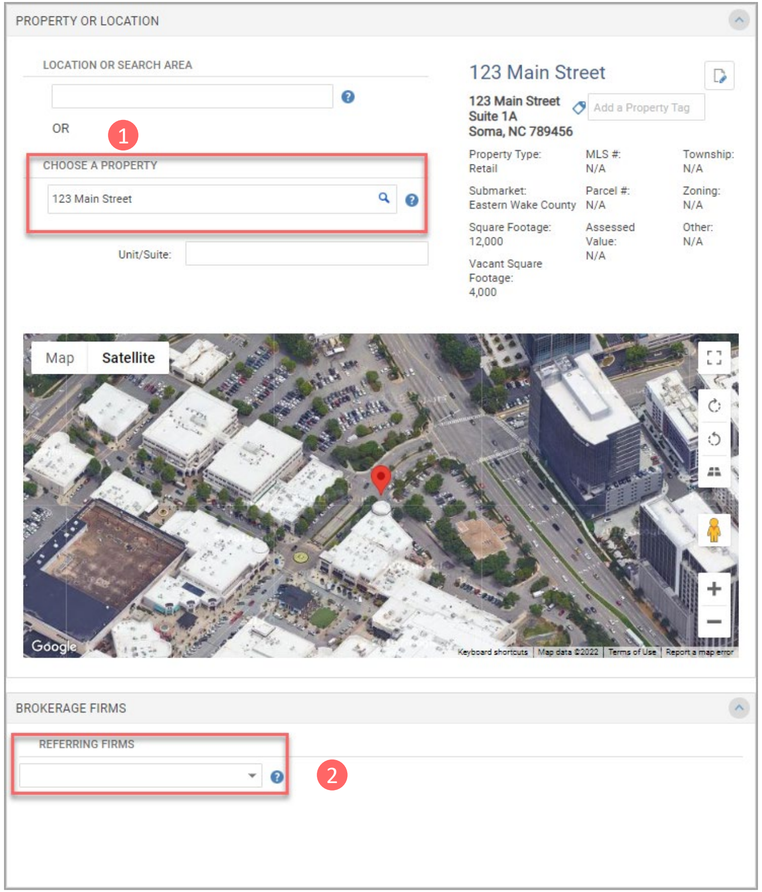
3 Use the dropdown to choose your Chance of Closing. You can always change this later on.



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.

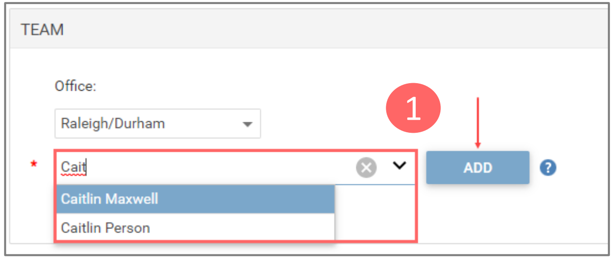


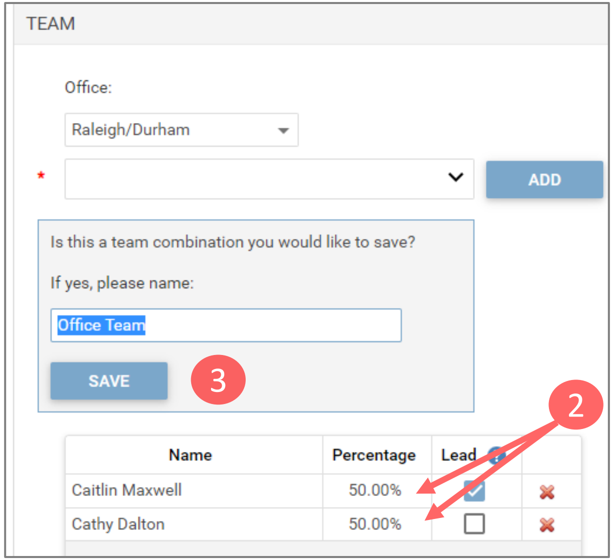
Team

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.)



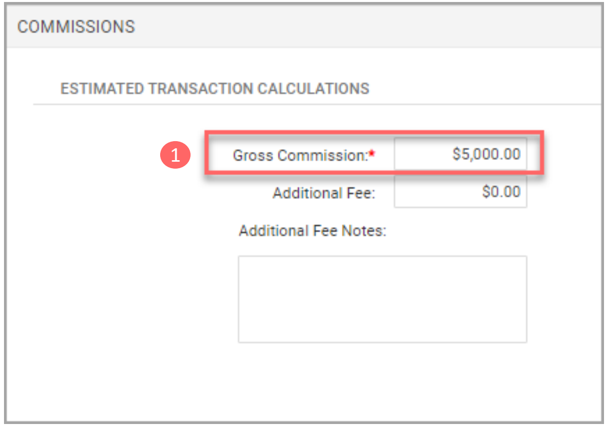


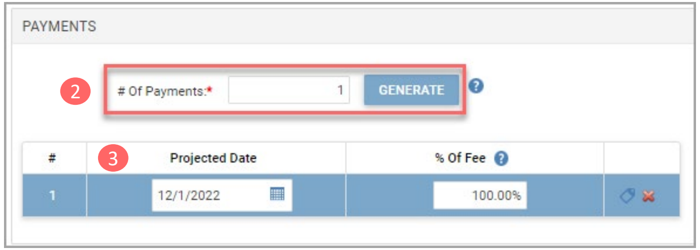
Commissions & Payments

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".

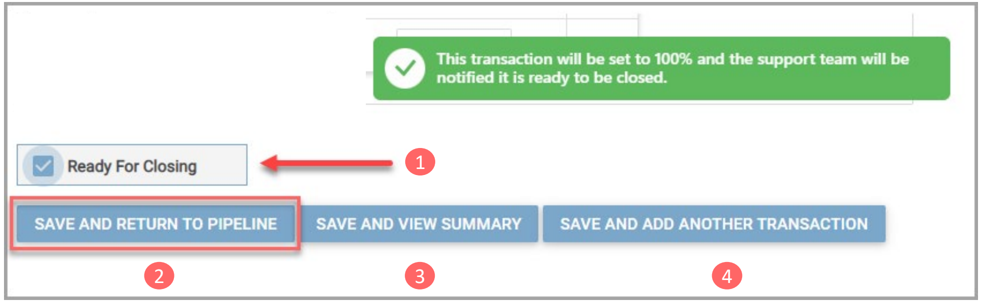
3 A row will populate for each estimated pay date. You can always change these dates later.





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.

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.)

Editing a Transaction

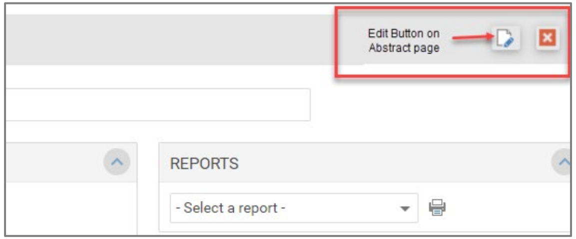
At the bottom of the Pipeline Summary, you will see three buttons.

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.

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.



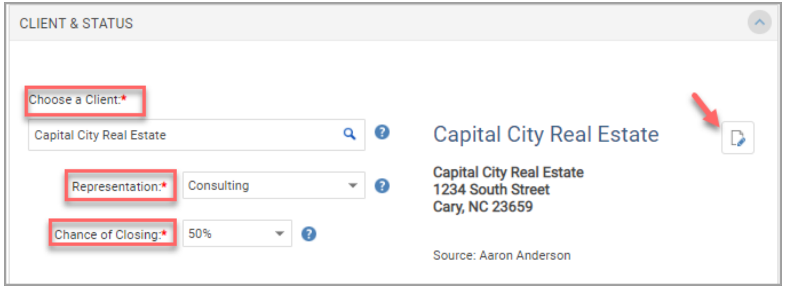
Finalizing the Details

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

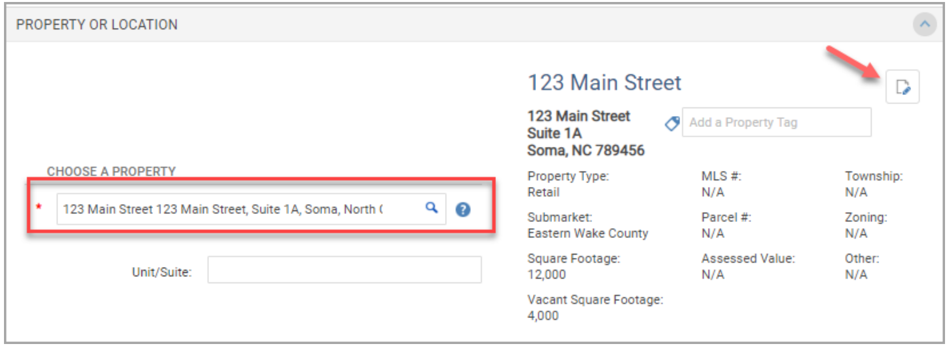
2 The Finalize Details button allows you to add more information to the transaction that you may have not previously had. For sales this would include an executed contract, or if you want to add escrow or critical date information. Click the Finalize Details button when you have this information.

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.



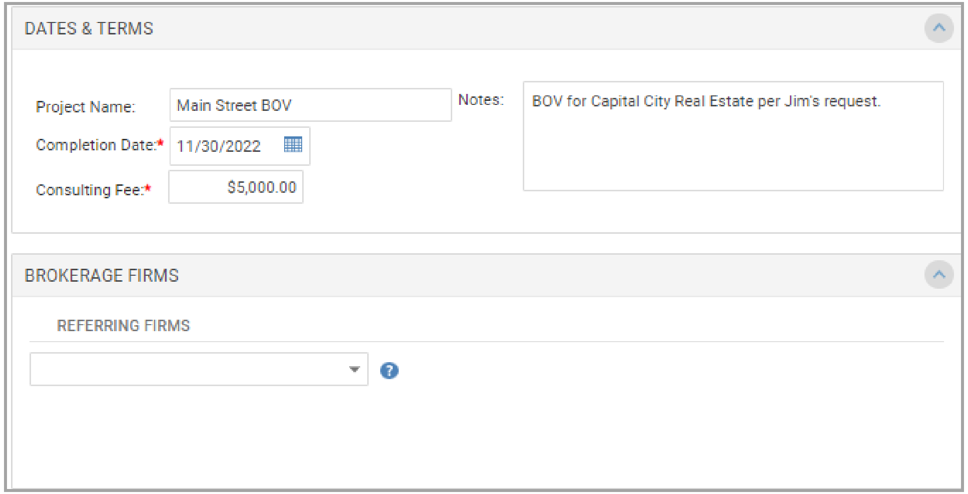
4 Add or confirm the property. You can also edit the property's details by clicking on the edit icon to the right.



Finalizing the Details

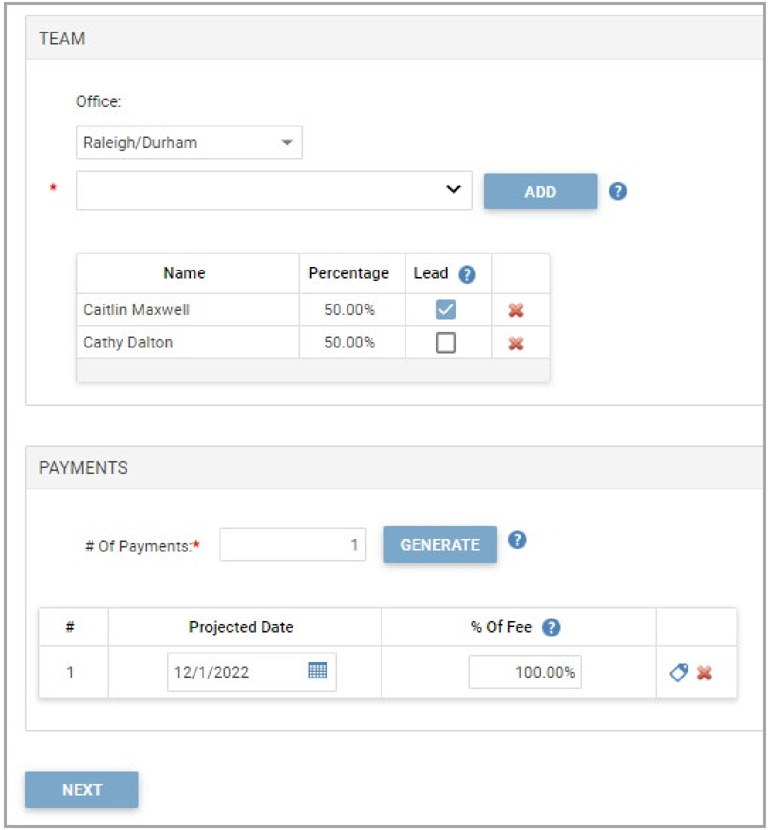
5 In the Dates & Terms section, you can add a Project Name for the transaction, as well as notes to describe the purpose or details of the deal.

6 If there is a referring firm on the deal, you can add them to the Brokerage Firms section. Otherwise, leave this area blank.



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.



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.

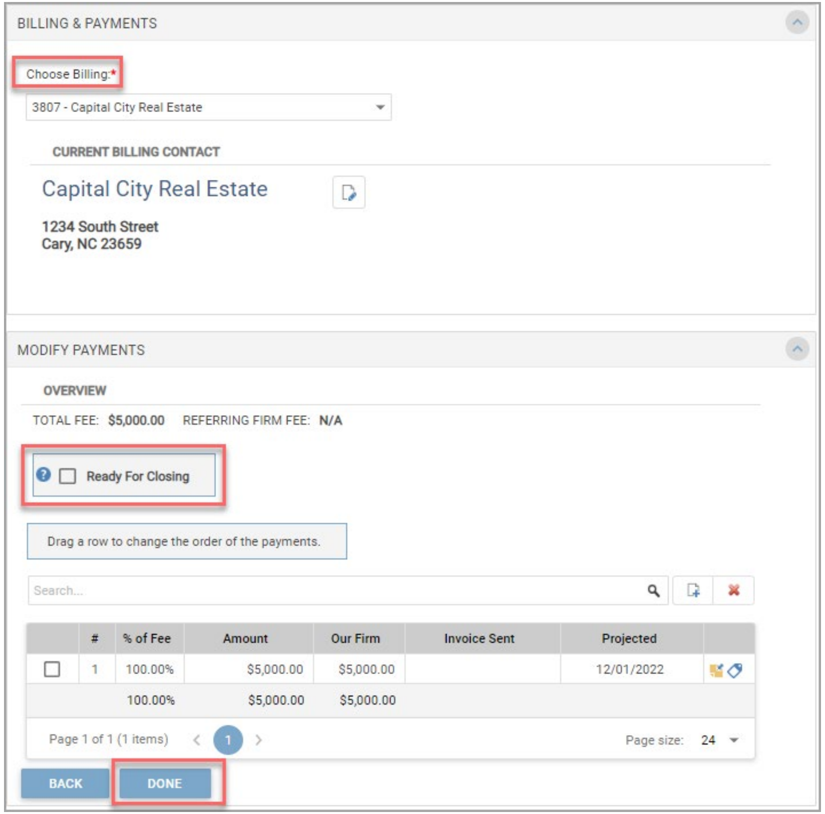
When you have completed everything on the Details page, click the Next button to go to the Billing and Payments page.

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.



Please contact us with any questions

Support Team

919-568-1800

support@realcoreapps.com

www.realcoreapps.com