Compliance in Command
Job Aid

KW CHICO AREA
KELLERWILLIAMS. REALTY

Step by Step

Compliance in Command

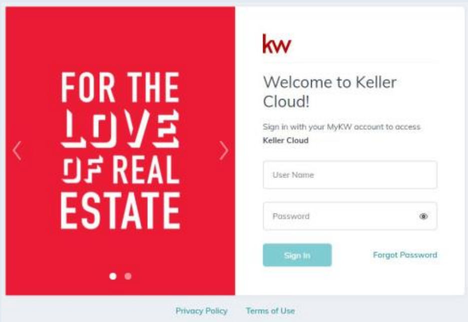
Logging In & Creating Contact

Log Into Command

Step 1: Navigate to www.agent.kw.com

Step 2: Log in using your MyKw credentials

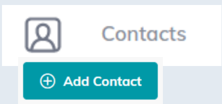
Note: If you need your login information, see the MCA.



Create Contact(s)

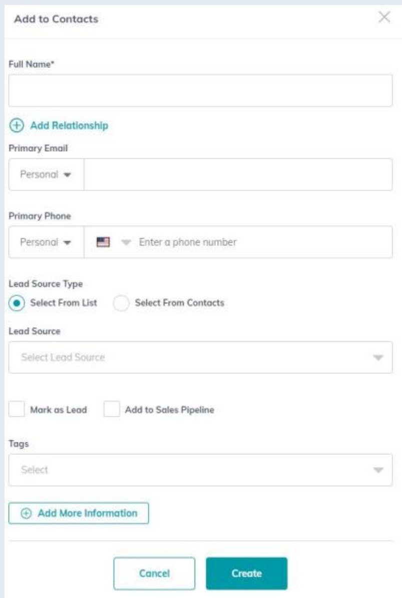
Step 1: Click on the Contacts icon

Step 2: Click on Add Contact icon



Step 3: Add all available information for Contact and click Create

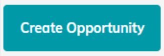
Note: You can skip this step if you already have your contacts entered or synced into Command



Create Opportunity

Create a New Opportunity

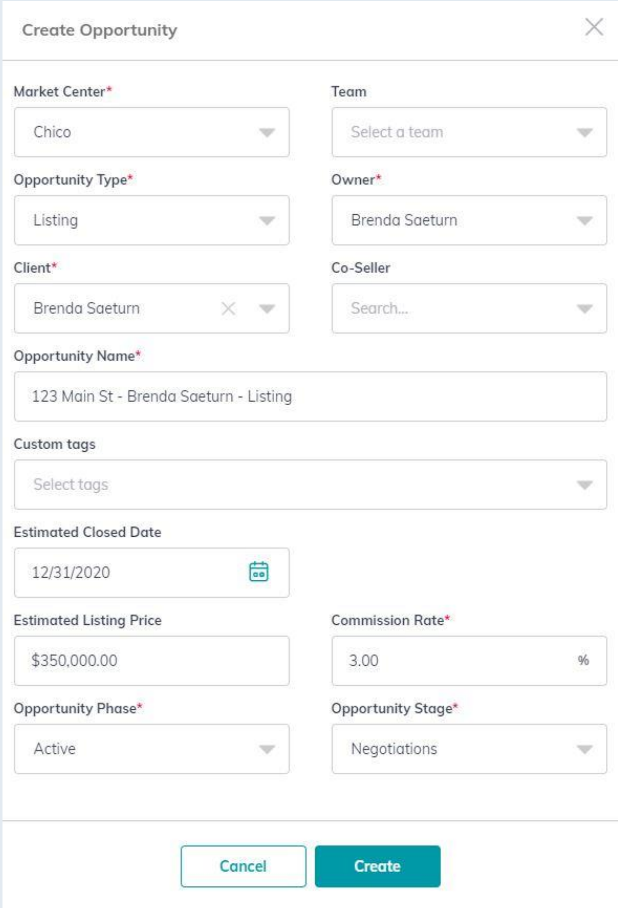
Step 1: Click Opportunities icon 

Step 2: Click on Create Opportunity 

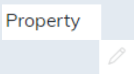
Step 3: Update the following fields

- Market Center = Chico
- Opportunity Type = The side you represent
- Client = Start typing client name & select from list
- Co-Seller/Co-Buyer = Start typing client name and select from list
- Opportunity Name = Address – Client Name – Side
- Estimated Closed Date = Listing (Expiration Date); Buyer (Estimated COE date)
- Estimated List Price/Budget = List Price/Purchase Price
- Commission Rate = ONLY your side of the commission
- Opportunity Phase = Active
- Opportunity Stage = Negotiations

Note: If you are on a team, the team name will be in your drop-down menu and the Owner will be the Rainmaker/Team Lead



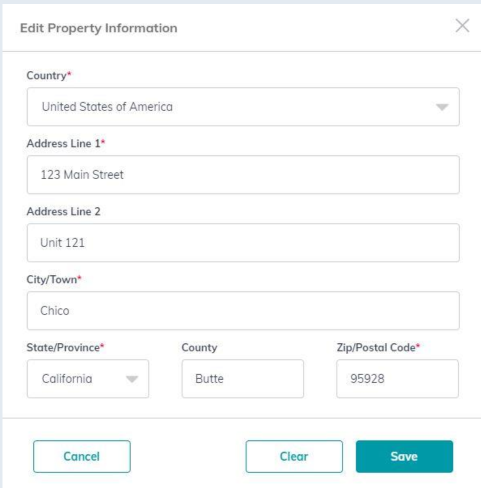
Add Address to Opportunity

Step 1: In the Details tab, click on the pencil for Property 

Step 2: Update the following fields and click Save:

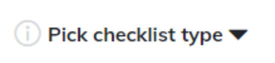
- Country = United States of America
- Address Line 1 = Start typing address and select correct property from list
- Address Line 2 = Apt/Unit/Spc #
- City/Town = Will Auto-fill based on your selection
- County = Will Auto-fill based on your selection
- Zip/Postal Code = Will Auto-fill based on your selection

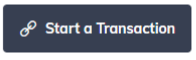
Note: You MUST enter a property in for the Opportunity to work properly.

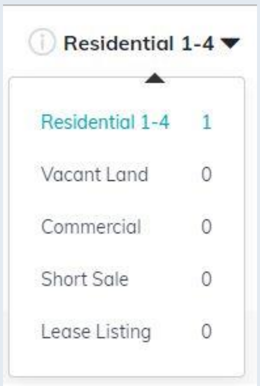


Add a Checklist to Opportunity & Create a Docusign Room

Step 1: Click Documents tab

Step 2: Click on Pick checklist type and select appropriate list 

Step 3: Click on the Start a Transaction button 



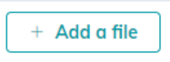
Note: There are 3 sections to each checklist. To get to a different section, click on the name on the left-hand side.

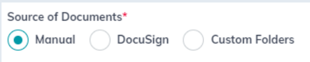
You MUST click the Start a Transaction to open the Docusign Room for the sync to work properly

You do not have to use Docusign Rooms to manage your documents. If you elect to use a different document management tool, you can skip Step 3

Manage Opportunity

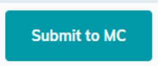
Adding Documents to Opportunity Checklists

Step 1: Click on +Add a file next to the document you are needing to upload 

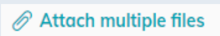
Step 2: Choose Manual or DocuSign 

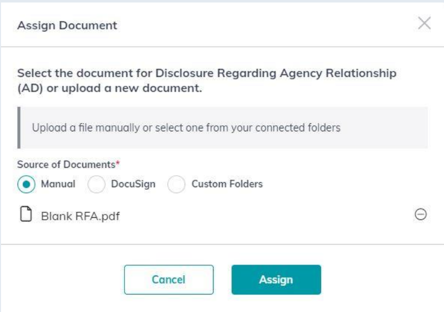
- If you choose manual, you will be uploading the document from your computer/Dropbox/Drive
- If you choose DocuSign, you will pull the document from the DocuSign Room connected to this Opportunity

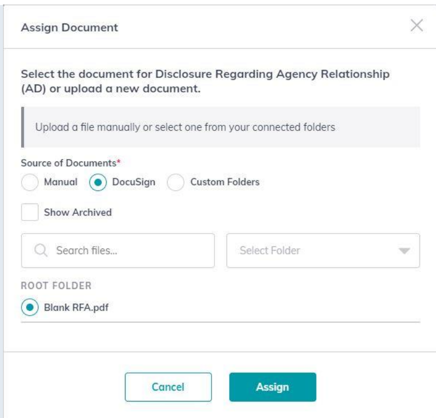
Step 3: Once the document is selected, click Assign

Step 4: Once all documents have been attached, click Submit to MC 

Note: You MUST click the Submit to MC button to initiate review; File Reviewer will not know to go into your checklist unless you click this button

You can attach multiple documents at the same time by clicking the Attach multiple files link 





Submitting Accepted Offer

Step 1: Open the Opportunity and click on Details tab

Step 2: Click on the pencil to edit the General Information

Step 3: Change the Opportunity Phase to Under Contract and Stage to Escrow

Step 4: Change the Estimated Closed Date to the COE date and Budget/Estimated List Price to the Sales Price

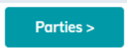
Step 5: Update the Commission Rate, if needed

Step 6: Click Save

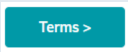
Step 7: Click on Offers & Commissions tab

Step 8: Click Add New Offer 

Step 9: Click Create Offer 

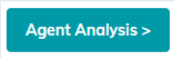
Step 10: Enter the following information and then click 

Parties button:

- Version Name = Enter identifying info for this offer 

- Offer Date = Acceptance Date
- Close Date = Close of Escrow Date

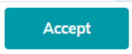
Step 11: Enter the following information and then click Terms button



- Buyer/Seller = Client on other side of transaction
- Associate's Name = Agent on other side of transaction

Step 12: Enter the Cash & Finance Amounts to get total Sales Price and click Agent Analysis

Step 13: Click Save button 

Step 14: Click Accept button 

Note: You MUST do this step to get to the Commissions (New Greensheet)

Submit Commissions (New Greensheet)

Step 1: Click on Manage Commissions

Step 2: Click on Edit General Information

Step 3: Update any fields that are incorrect and add the Contract Date then click Save Changes

Step 4: Click Edit Agent Payment

Step 5: Add KW Cares Amount

Step 6: Click Add item

Step 7: Click on drop-down menu and select Deduction and fill out the following fields then click Add:

- Amount = 100/75
- Pay To = KW
- Description = File Fee
- Address = Start typing the office address and it should come up for you to select
- Phone = Office number

Step 8: Click Add item

Step 9: Click on drop-down menu and select Deduction and fill out the following fields then click Add:

- Amount = Heart to Heart donation amount
- Pay To = KW
- Description = H2H
- Address = Start typing the office address and it should come up for you to select
- Phone = Office number

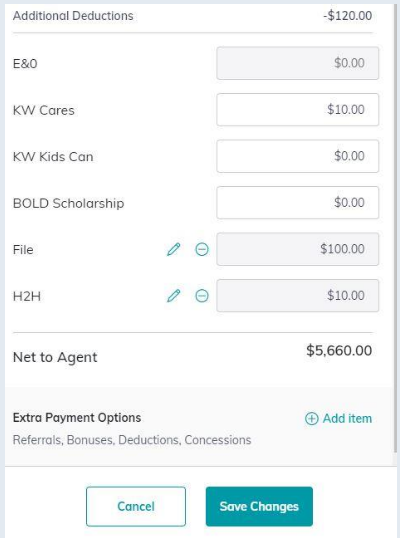
Step 10: Click Save Changes

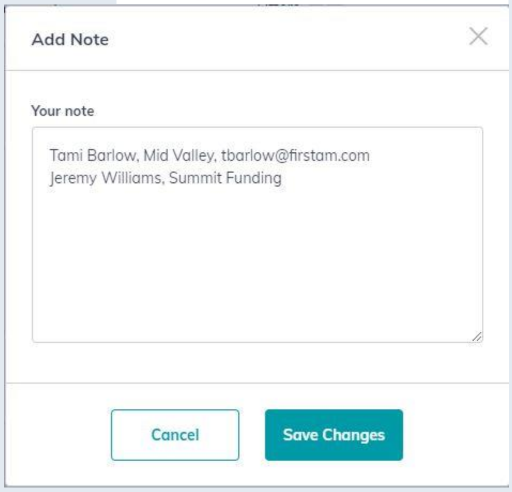
Step 11: Click Add Note

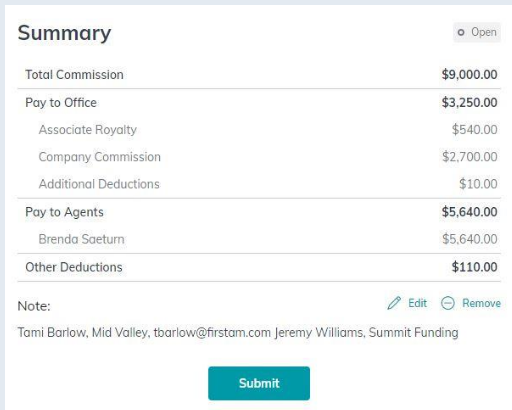
Step 12: Add Escrow Officer Name, Company & Email & Lender Name, Company then click Save Changes

Step 13: Verify Commissions Summary looks correct and click Submit

Note: You MUST click Submit for the Commissions to be sent to MCA/AMCA for a CDA.







Cancelling an Escrow

Cancel Commissions/CDA

If a transaction cancels, you will need to cancel the Commissions

Step 1: Open the Opportunity and go to the Offers & Commissions tab

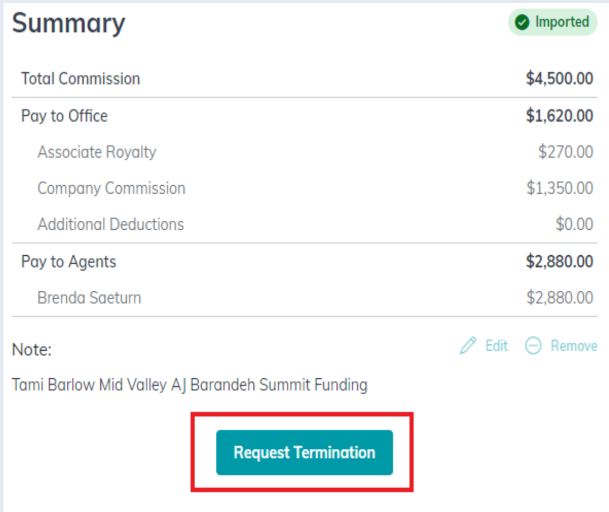
Step 2: Click on View Commission View Commission

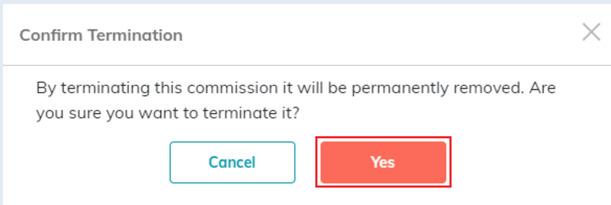
Step 3: Click Request Termination

Step 4: Click Yes

Note: The request will go to the MCA and trigger a cancellation of the CDA, if it has already been created. If you have not submitted the Commissions then you can skip this part

You may want to move the Opportunity out of the





Create New Compliance Checklist

When you have a new escrow for this client, you can create a new checklist without having to create a new Opportunity

Step 1: Open the Opportunity and click on the Documents tab

Step 2: Select the Under Contract section of the checklist

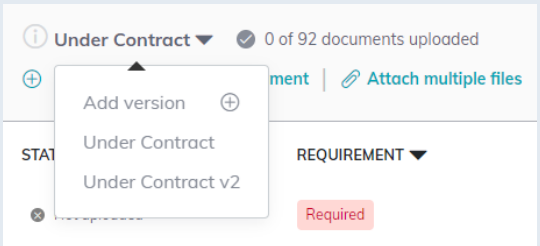
Step 3: Click on the drop-menu just above the checklist; it should say Under Contract

Step 4: Click Add version

Step 5: Name the new version and click Create New Version

Note: This will create a new version for just that section of the checklist. This means you no longer have to reupload your listing documents from the Listed section.

You will follow previous instructions for adding documents to your checklist and Adding an Offer/Creating a Commission



Miscellaneous

Send File Review/MCA/AMCA Message OR Make Note

In each checklist, there is a messaging feature. You can use this to communicate with File Review or MCA/AMCA easily. You can also make general notes that everyone can see.

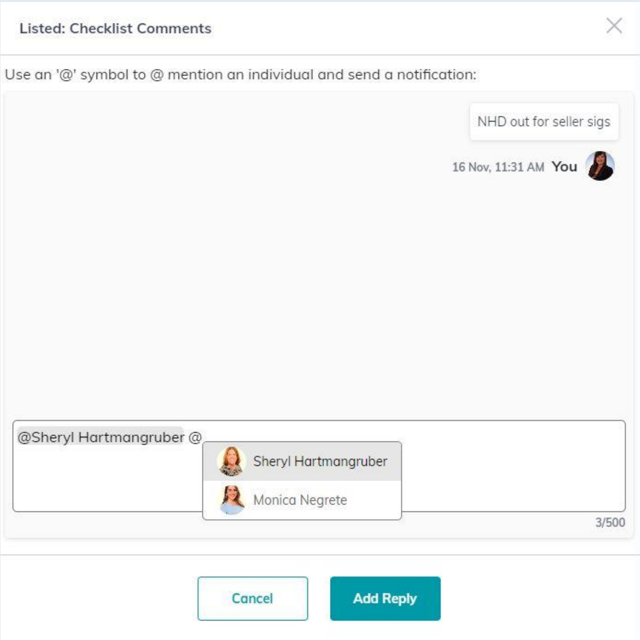
Step 1: Click on Add Comment Add Comment

Step 2: Type in your note and click Add Reply

Step 3: If you want to message someone directly, you need to type the @ symbol and select them from the list. Then type your message and click Add Reply

- Tagging someone will give them a notification that they have a message

Note: This will also be how File Review will communicate any notes to you. You will get a notification that you have message and you can also tell if you have a notification when logged into Command by checking your bell icon in the upper right-hand corner of the page.



Closed Opportunity

Once a transaction has closed, move the Opportunity to the Closed Phase & Stage

Step 1: Open the Opportunity and go to the Details tab
Step 2: Click on the pencil next to General Information
Step 3: Click on the drop-down menu for Opportunity Phase and select Closed; do the same for Opportunity Stage if not defaulted to Closed
Step 4: Click Save