

\$\$ Get Paid ON TIME! \$\$


After you go under contract, make sure these items are complete in your Command!

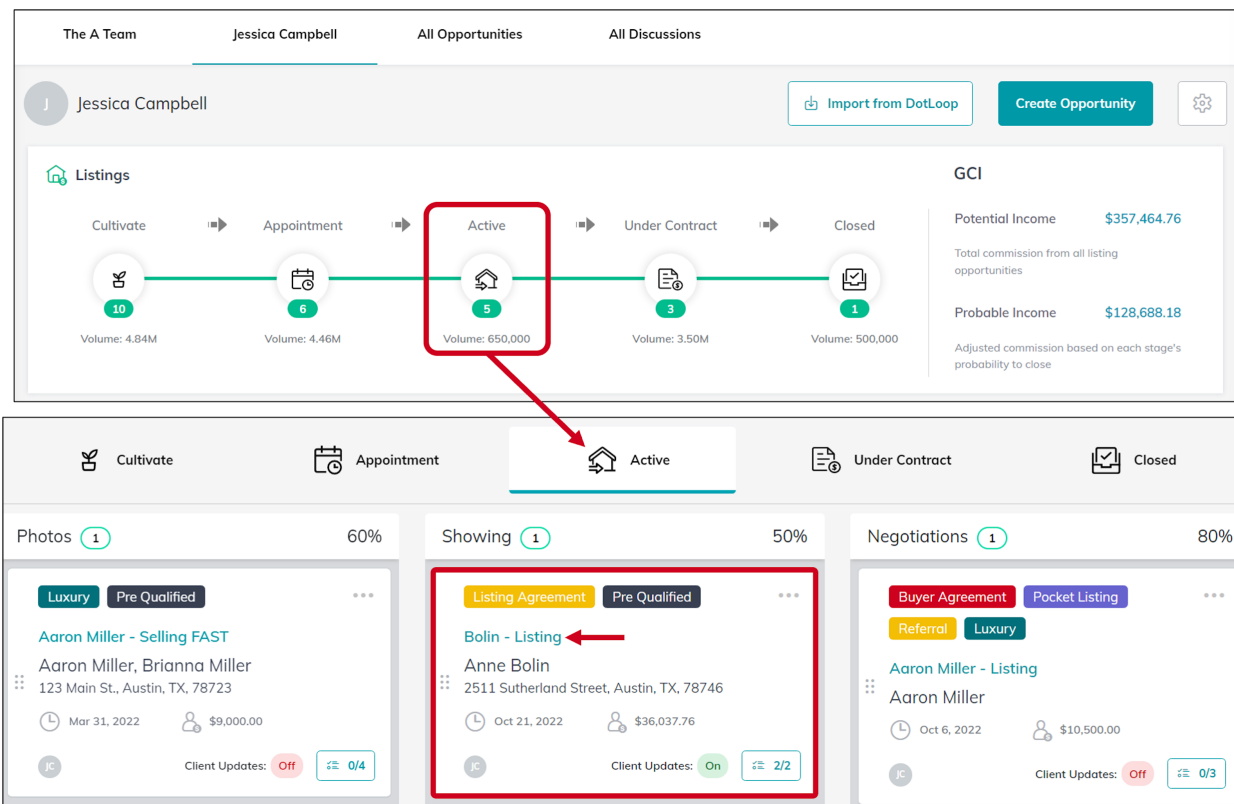
1. Change the OPPORTUNITY NAME to the address where the transaction is taking place in DETAILS under KEY INFORMATION. (i.e. the Listing Address or the address your buyers are purchasing)
2. Add the property address under the PROPERTY section in DETAILS.
3. Go to DOCUMENTS and make sure all your signed documents are up-to-date and uploaded. Make sure to hit SUBMIT TO MC on each checklist (For Listings - Listed, Under Contract and Closed - on the left hand side of the screen. For Buyers - Consultation, Under Contract and Closed - on the left hand side of the screen.) Reference "Attached Compliance Documents to an Opportunity" guide for step-by-step instructions.
4. Go to OFFERS & COMMISSIONS. Click ADD NEW OFFER - reference "Create An Offer in an Opportunity" guide for step-by-step instructions.
5. Click ACCEPT on your accepted offer.
6. Click MANAGE COMMISSION on your accepted offer. Reference "Submit a Commission Request for an Opportunity" guide for step-by-step instructions.

KEY THINGS TO NOTE:

- If you are working with a referral, please upload your Referral Agreement and W9 in the Closed checklist. Your commission split for your referral can be added under ADD ITEM and OUTSIDE REFERRAL in the Commission tab.
- Make sure you are including any splits with your team, Productivity Coaching, or with a referral partner in your Commission tab so we are properly allocating your commission. This can be added with ADD ANOTHER AGENT
- If you have any changes to your commission after you've submitted your commission tab - please type up the changes in a Word document, save as a PDF and upload in the Closed folder. Sharyn will be able to review this before she processes your commission.

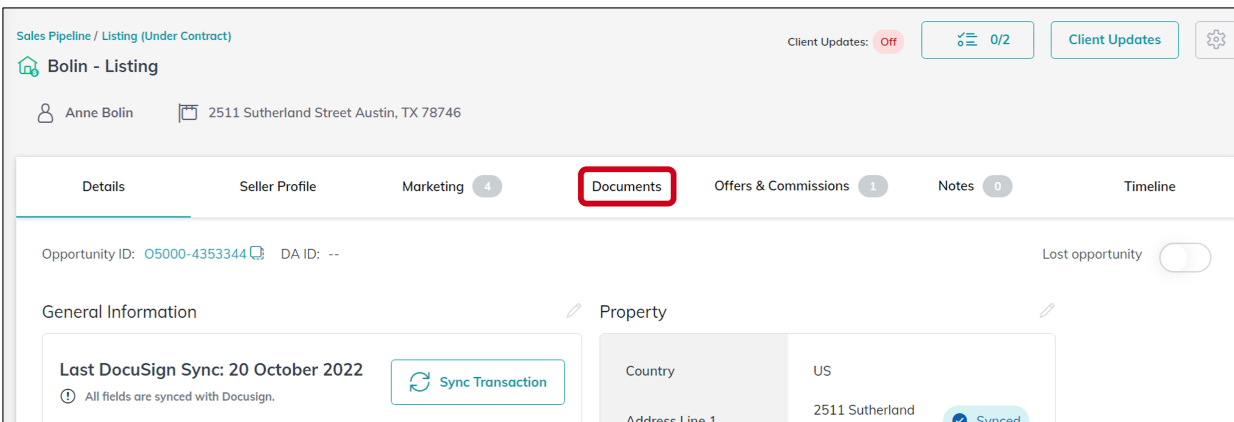
Attach Compliance Documents to an Opportunity

1. Log in to <https://agent.kw.com> with your Keller Williams login credentials.
2. Click the **Opportunities icon**, , on the left sidebar.
3. From the Opportunities Dashboard, click on the **phase**, where your Opportunity is located, then click on the **Opportunity Title**.

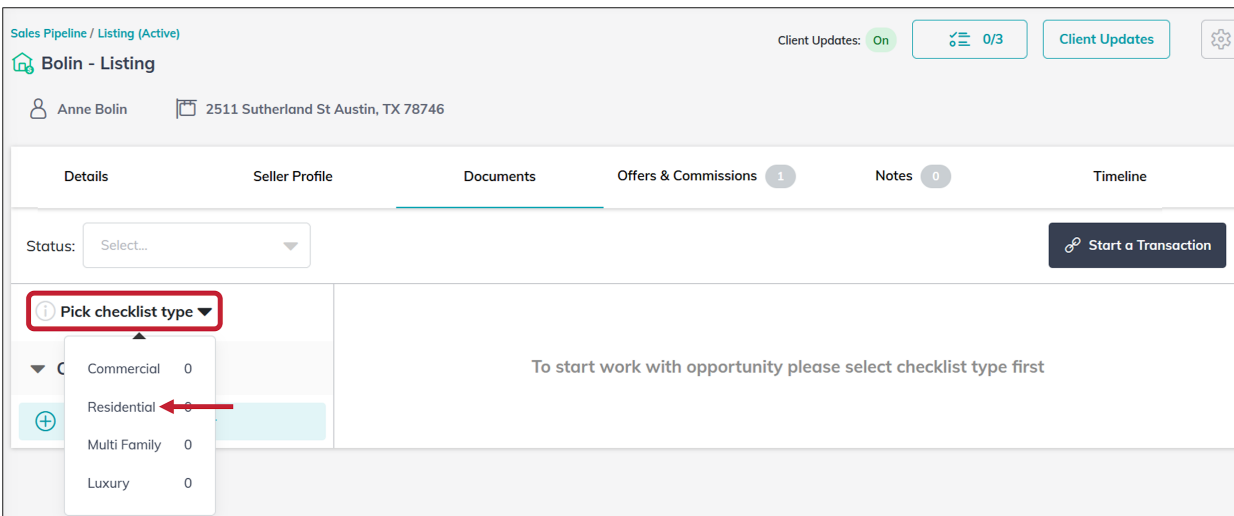


The screenshot displays the Keller Williams Opportunities Dashboard for Jessica Campbell. At the top, there are tabs for 'The A Team', 'Jessica Campbell', 'All Opportunities', and 'All Discussions'. Below this, the user's name 'Jessica Campbell' is shown along with buttons for 'Import from DotLoop', 'Create Opportunity', and a settings icon. The main section features a 'Listings' workflow diagram with five stages: Cultivate (10, Volume: 4.84M), Appointment (6, Volume: 4.46M), Active (5, Volume: 650,000), Under Contract (3, Volume: 3.50M), and Closed (1, Volume: 500,000). The 'Active' stage is highlighted with a red box, and a red arrow points from it to the 'Active' tab in the navigation bar below. To the right of the workflow is a 'GCI' summary with 'Potential Income' of \$357,464.76 and 'Probable Income' of \$128,688.18. The navigation bar includes tabs for 'Cultivate', 'Appointment', 'Active', 'Under Contract', and 'Closed'. Below the navigation bar, there are three columns of opportunity cards: 'Photos' (1, 60%), 'Showing' (1, 50%), and 'Negotiations' (1, 80%). The 'Showing' column contains a card for 'Bolin - Listing' (Anne Bolin, 2511 Sutherland Street, Austin, TX, 78746, Oct 21, 2022, \$36,037.76) which is highlighted with a red box and has a red arrow pointing to its title. Other cards include 'Aaron Miller - Selling FAST' and 'Aaron Miller - Listing'.

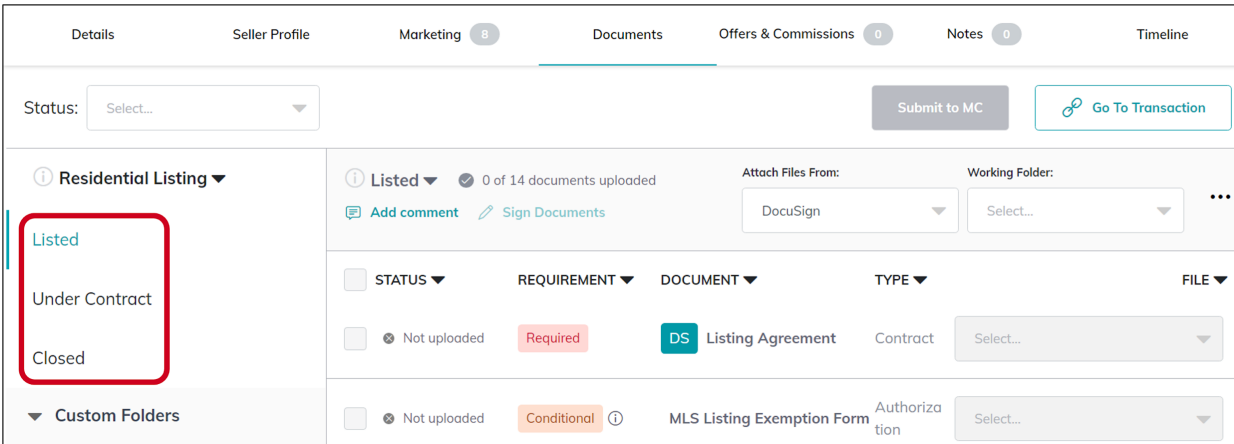
4. Click **Documents**, at the top of the page.



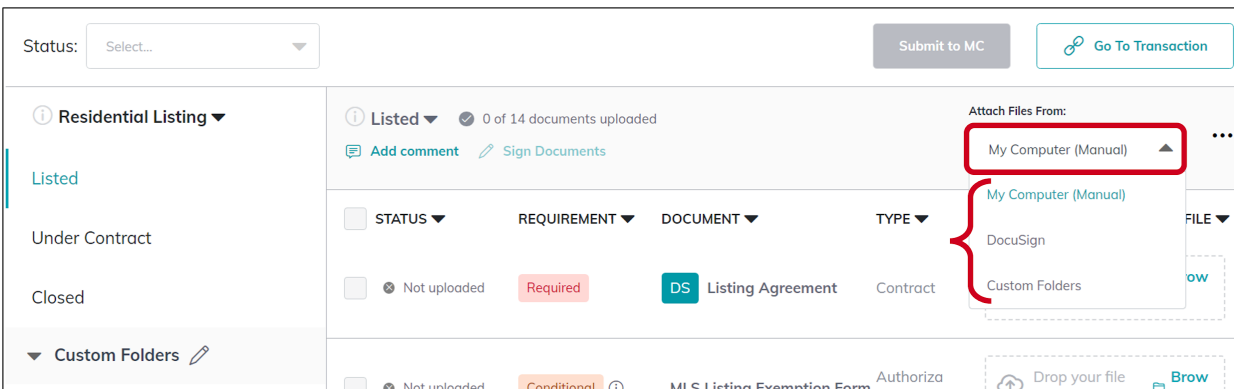
5. On the left side of the page, use the Checklist Type drop-down to select the **type of checklist** you will be adding documents for.



6. Next, choose the **compliance event** (Listed, Under Contract, Closed, etc.) where the document will be added.



7. At the top right of the checklist, use the drop-down to select where you want to pull the document(s) from.



Keep in mind, if you are going to pull documents from Dotloop or DocuSign that you must have that system connected in Command and connected to this Opportunity. Once you create a Dotloop Loop or a DocuSign Room from this Opportunity, you will be locked in to that platform and won't be able to switch where you are pulling documents from.

In addition to that there may be a situation where the document is from neither of those platforms and is too big to be uploaded all at once or has some pages that don't need to be included. If that is the case, [users can split a pdf into multiple documents](#) within Command and attach the split pages to a specific checklist item.

8. Attach the document to the corresponding checklist item. You can switch between different document sources as you complete each item, depending on where the document is located.

- If you choose to pull from [DocuSign](#), you will see two drop-downs appear at the top right of the checklist.
 1. In the "Working Folder" drop-down, if you have set up custom document folders in DocuSign, **choose the folder you want to pull documents from**, and if not, select Room Docs.
 2. In the "Attach Files From" drop-down, a list of documents you have in the corresponding DocuSign Room Folder will then be available to attach. **Select the corresponding file** in the checklist item.


In the "Working Folders" drop-down, you must select a folder to pull documents from to be able to pull in documents.

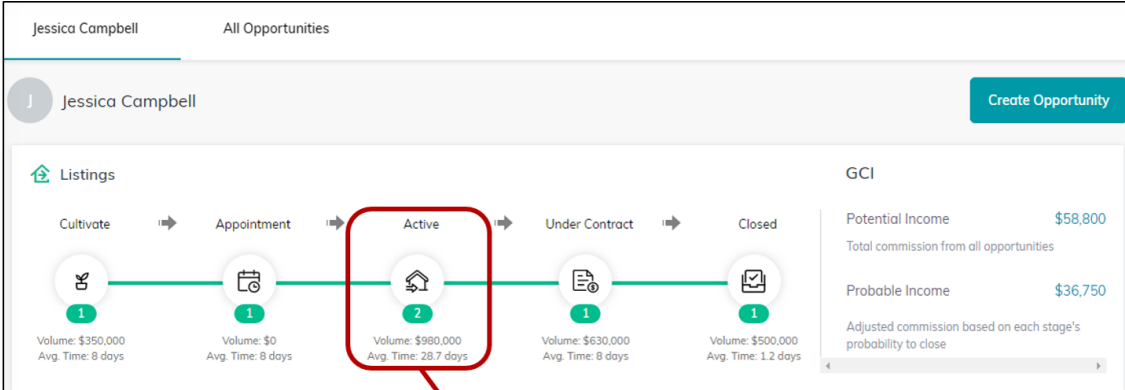
Even if you don't have custom folders set up in the Documents tab of your DocuSign Room, select "Room Docs" to pull from the default section of this tab.

- If you choose [My Computer \(Manual\)](#), **click to browse** your computer for the file, or **drag the file into the space provided**. When using the manual option, the

only file type accepted is PDF. However, JPEGs and such can be uploaded in DocuSign Rooms, where you will be able to manage the document and pull it into the checklist. Utilize ilovepdf.com if you need to convert a JPEG to a PDF.

Create an Offer in an Opportunity

1. Log into <https://agent.kw.com> with your Keller Williams login credentials.
2. Click the **Opportunities icon**, , on the left sidebar.
3. From the Opportunity pipeline, click on the **phase**, where your Opportunity is located, then click on the **Opportunity card**.
4. Click on the **phase**, where your Opportunity is located, then click on the **Opportunity Title**.



Jessica Campbell All Opportunities

Jessica Campbell [Create Opportunity](#)

Listings

Cultivate → Appointment → **Active** → Under Contract → Closed

GCI

Potential Income	\$58,800
Total commission from all opportunities	
Probable Income	\$36,750
Adjusted commission based on each stage's probability to close	

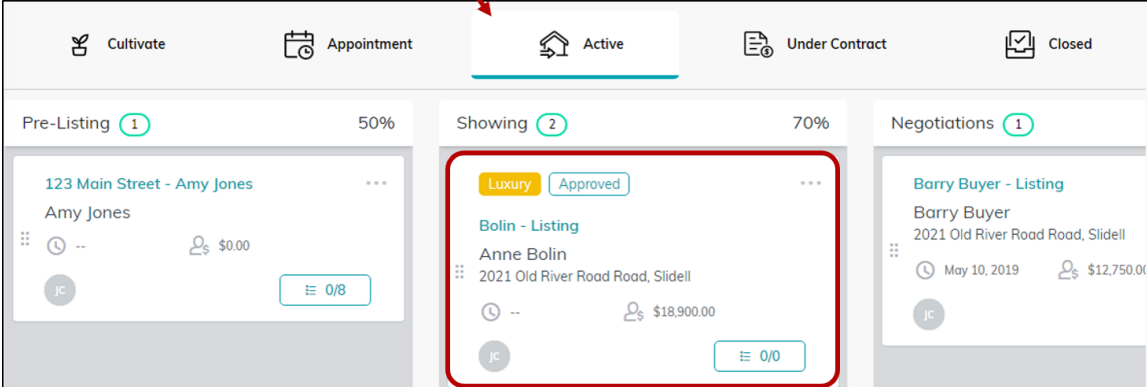
Volume: \$350,000 Avg. Time: 8 days

Volume: \$0 Avg. Time: 8 days

Volume: \$980,000 Avg. Time: 28.7 days

Volume: \$630,000 Avg. Time: 8 days

Volume: \$500,000 Avg. Time: 1.2 days



Cultivate Appointment **Active** Under Contract Closed

Pre-Listing 1 50%

Showing 2 70%

Negotiations 1

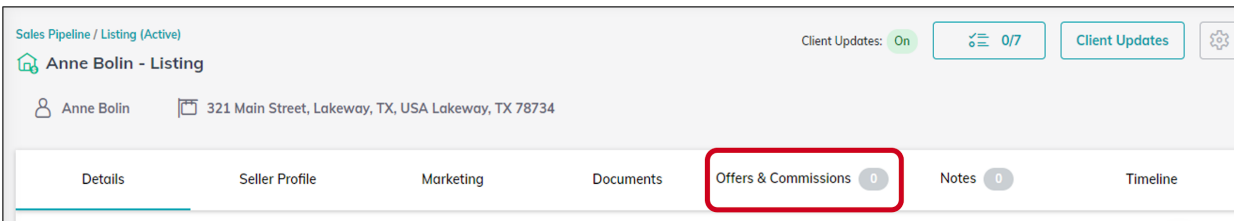
123 Main Street - Amy Jones
Amy Jones
\$0.00
0/8

Luxury Approved

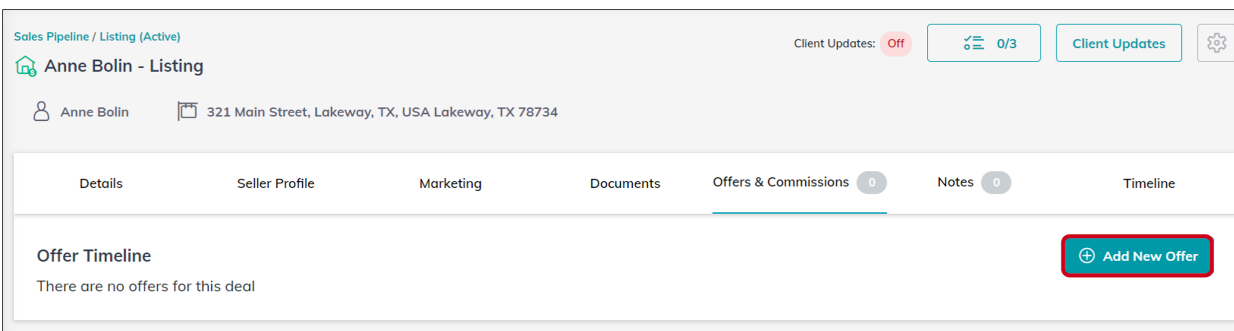
Bolin - Listing
Anne Bolin
2021 Old River Road Road, Slidell
\$18,900.00
0/0

Barry Buyer - Listing
Barry Buyer
2021 Old River Road Road, Slidell
May 10, 2019 \$12,750.00
0/0

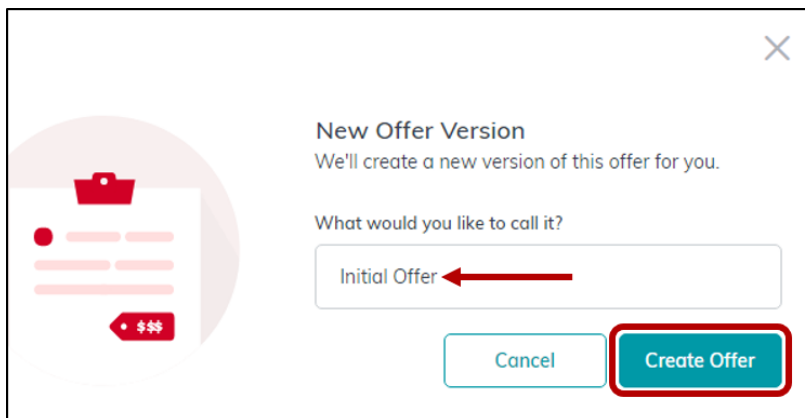
5. At the top of the Opportunity, click **Offers & Commissions**.



6. Click **Add New Offer**, on the right side of the page.



7. **Name your offer** (it is suggested you include "Initial Offer" in this title, as it will distinguish it from any counters/negotiations).



8. Complete the Offer Details section. Enter the Offer Version Name, and set the Offer Date and Close Date. Click **Parties**, at the bottom right of the page, when finished.

Initial Offer

Offer Details Parties Terms Agent Analysis

Offer Details

Version Name

Initial Offer

Offer Date Close Date

5/8/2020 5/11/2020

Back Parties >

On the Buyer side, you will also enter the listing details, either by clicking **Select from KWLS**, or by manually entering the details in the Address field.

- When manually adding an address that is not recognized by the autofill drop-down, enter the zip/postal code as 12345 or add on a long string of numbers and letters. This will trigger a Create Manually option, which will allow you to enter any address you need.

9. Enter either the Buyer or Seller information, along with their agent's information as well. The side you are representing should be auto-filled with any information you have already entered into Command. Click **Terms**, at the bottom right of the page, when ready.

Initial Offer

Offer Details Parties Terms Agent Analysis

Parties

<p>Buyer</p> <p>Name*</p> <input type="text" value="Brian Williams"/>	<p>Seller</p> <p>Name*</p> <input type="text" value="Anne Bolin"/>
<p>Email</p> <input type="text" value="brian.williams@myemail.com"/>	<p>Email</p> <input type="text" value="anne.bolin@myemail.com"/>
<p>Phone</p> <input type="text" value="(512) 555-9982"/>	<p>Phone</p> <input type="text" value="(512) 555-4431"/>
<p>Fax</p> <input type="text"/>	<p>Fax</p> <input type="text"/>
<p>Address</p> <input type="text" value="Search for location"/>	<p>Address</p> <input type="text" value="2541 Sutherland Stre"/>

Pre-Approved Pre-Qualified

Representation

<p>Associate's Name*</p> <input type="text" value="James Anderson"/>	<p>Associate's Name*</p> <input type="text" value="Jessica Campbell"/>
<p>Email</p> <input type="text" value="james.anderson@myemail.com"/>	<p>Email*</p> <input type="text" value="jessica.campbell@kw.com"/>
<p>Phone</p> <input type="text" value="(512) 555-7781"/>	<p>Phone</p> <input type="text" value="(512) 555-4431"/>

10. Enter the Terms of the offer. Click **Agent Analysis**, at the bottom right of the page, when finished.

Initial Offer

Offer Details Parties **Terms** Agent Analysis

Terms

Cash Finance Amount Sales Price

<input type="text" value="\$120,000.00"/>	+	<input type="text" value="\$480,000.00"/>	=	<input type="text" value="\$600,000.00"/>
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Earnest Amount

Percentage Earnest Amount

<input type="text" value="1"/> %	<input type="text" value="\$6,000.00"/>
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Option Fee

Option Fee

Termination Option

Buyer will give notice of termination within days after contract.

Seller Costs

Seller will contribute to a residential service contract.

Seller will contribute to settlement costs.

11. Now, **enter the Agent Analysis**. This is where you have the opportunity (pardon the pun) to show your expertise and give your opinion of the offer. List the pros, cons, and give a summary. This will be useful later, when you email the Offer Comparison to your client.

Initial Offer

Offer Details Parties Terms Agent Analysis

Agent Analysis

Pros

They're pre-approved and they offering exactly what our asking is

Cons

Summary

This is a great offer!

Back Save

12. Click **Save**, at the bottom right of the page, when finished.

13. On your offer, you have the option of clicking either **Accept** or **Reject**.

- Clicking Reject will mark the offer as rejected, but keep it on the list. You can change the response later, if the situation changes.
- Clicking Accept will unlock the Manage Commission button, allowing you to complete and submit a Commission Request to your Market Center. You have the ability to change the response (and terminate a Commission Request), if the situation changes.

Offer Timeline

⊕ Add New Offer Compare Offers Generate Offer Url

Select All

SEP 05, 2019

BS Bob Stephens Buyer	RW Ricky Wright Agent	✓ Buyer Pre Approved	✗ Buyer Pre Qualified					Accept	Reject	...
\$620,000.00	\$50,000.00	\$570,000.00	\$6,820.00	\$500.00	09/08/19	0 days	Reviewing			
Offer	Cash	Finance Amount	Earnest Amount	Option Fee	Close Date	Termination Notice	Status			

▾ Previous Negotiations

Submit a Commission Request for an Opportunity

Important Notes:

1. This process does require agents to [create an offer](#) and [accept an offer](#) before being able to submit a Commission request.
2. Once you submit a Commission Request for an Opportunity, you will no longer be able to make certain edits:


- Listing Info
- Contract Date
- Closed Date
- Commission Rate

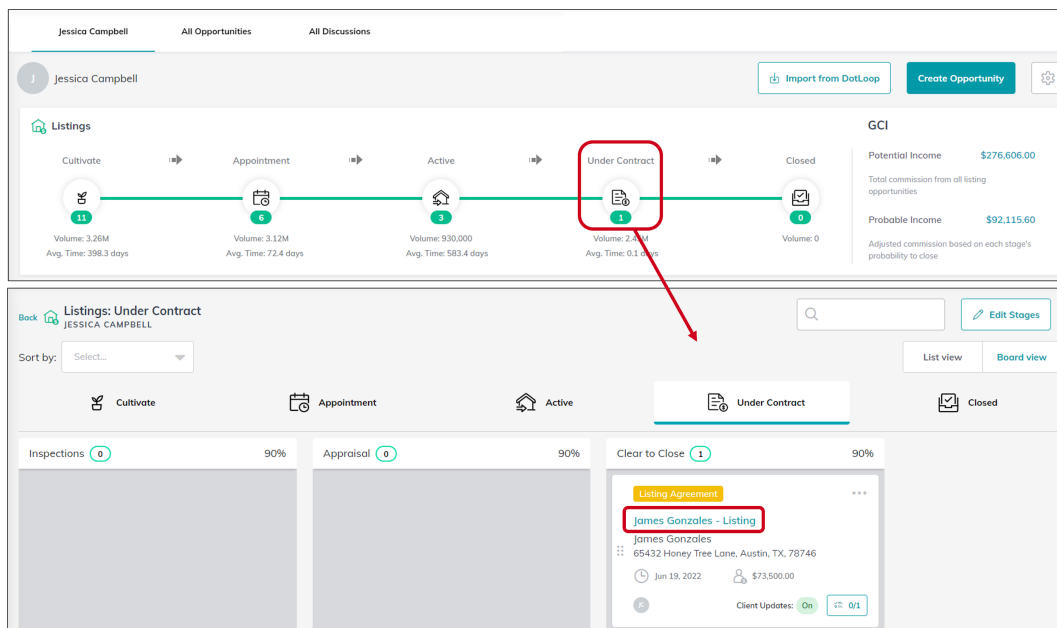
If you needed to make any of these changes after the Commission Request has been submitted, reach out to your MCA and have them return the request, which allow you to make full edits.

3. When you submit a Commission Request for an Opportunity that is in either the Cultivate or Appointment phase, the system will automatically move it to the first stage of the Active phase.

To submit a Commission Request for an Opportunity:

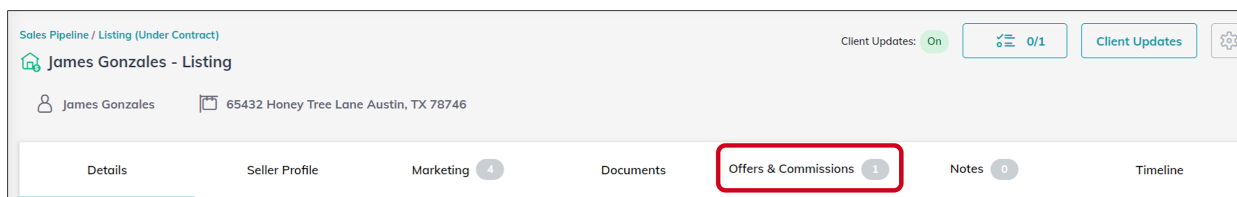
Access

1. Log in to <https://agent.kw.com> with your Keller Williams login credentials.
2. Click the **Opportunities** icon, , on the left sidebar.
3. From the Opportunities Dashboard, click on the **phase**, where your Opportunity is located, then click on the **Opportunity Title**.



The screenshot displays the Opportunities Dashboard for Jessica Campbell. At the top, there are navigation tabs for 'All Opportunities' and 'All Discussions'. Below this is a 'Listings' section with a progress bar showing stages: Cultivate (11), Appointment (6), Active (1), Under Contract (1), and Closed (0). A red box highlights the 'Under Contract' stage, with a red arrow pointing to a list of opportunities below. The list shows 'James Gonzales - Listing' under a 'Listing Agreement' tab, with details including the address '65432 Honey Tree Lane, Austin, TX, 78746', date 'Jun 19, 2022', and price '\$73,500.00'. To the right, a 'GCI' summary shows 'Potential Income \$276,606.00' and 'Probable Income \$92,115.60'.

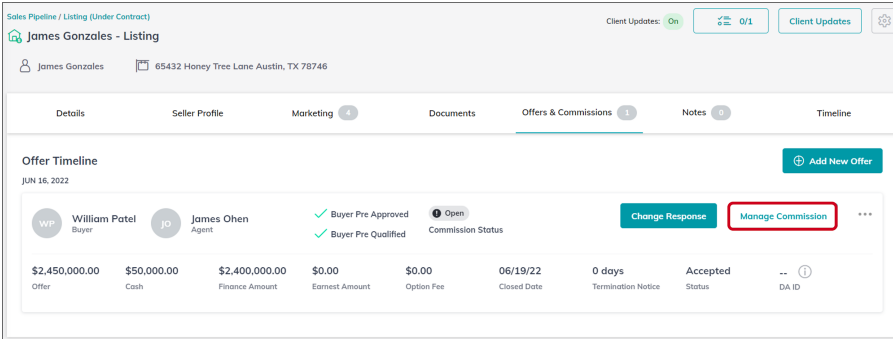
4. Once in the Opportunity, click the **Offers & Commissions** tab, at the top of the page.



The screenshot shows the details page for 'James Gonzales - Listing'. At the top, there are tabs for 'Details', 'Seller Profile', 'Marketing' (4), 'Documents', 'Offers & Commissions' (1), 'Notes' (0), and 'Timeline'. The 'Offers & Commissions' tab is highlighted with a red box. Above the tabs, there is a 'Client Updates' section with a status of 'On' and a '0/1' indicator.

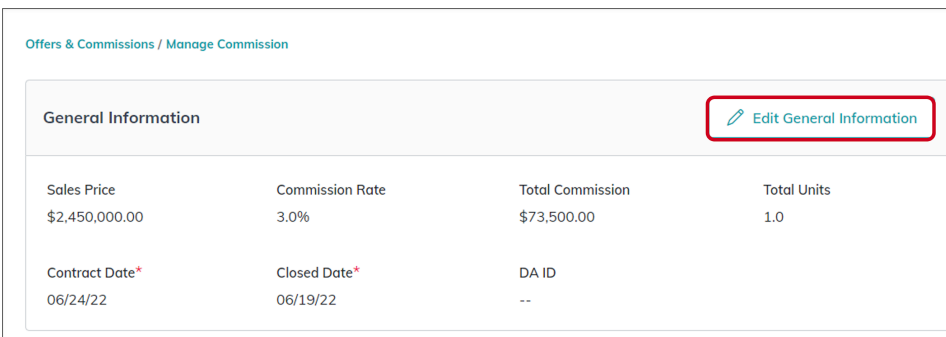
5. Find your accepted offer and click **Manage Commission**.

You must [create an offer](#) and [accept an offer](#) to see this option.



General Information

1. The Commissions page will auto-fill with the data you entered into the accepted offer. In the General Information section, you can make any last minute adjustments by clicking **Edit General Information**.



2. A window will appear where you can edit the Sales Price, Commission Rate, Contract Date, and Closed Date. Click **Save Changes** once you're done.

Edit General Information ✕



Sales Price*

Imported from the accepted offer.

Commission Rate* % **Total Commission***

Total Units

All transactions count as 1 Total Unit. This can be divided amongst Agents in the Payments section.

Contract Date*  **Closed Date*** 

Payment

Agent Payment

1. If you need to make any adjustments to your deductions, click **Edit Agent Payment**. If you have split a unit with another agent, make sure you've distributed the other half of the unit properly.

Payment [+ Add Another Agent](#) [+ Add Co-Broker Payment](#)

Jessica Campbell [Edit Agent Payment](#)

Agent Units	Agent Gross Commission	Net Pay to Agent	Payment date
1.0	\$73,500.00	\$49,493.00	06/19/22

▼ PAYMENT BREAKDOWN

Agent Gross Commission	\$73,500.00
------------------------	-------------

2. When you make the adjustment to the unit, click **Calculate Commission** and the Agent Gross Commission will update.

Edit Agent Payment ✕

Agent Name*

Jessica Campbell✕ ▼

Agent Units* **Agent Gross Commission***

1


\$73,500.00

[Calculate Commission](#)

Deductions, Concessions, Bonuses, and Referrals

1. Each agent will have a financial breakdown details section. In the Deductions section, there are spaces provided where each agent can donate to KW Cares, KW Kids Can, and the BOLD Scholarship fund.

If there is anything else that needs to be deducted from the total, click **Add Item**, below the Net to Agent amount.

Additional Deductions		-\$20.00
E&O	<input type="text" value="\$0.00"/>	\$0.00
BOLD Scholarship	<input type="text" value="\$20.00"/>	\$20.00
Nonprofit Deductions		-\$100.00
KW Cares	<input type="text" value="\$50.00"/>	\$50.00
KW Kids Can	<input type="text" value="\$50.00"/>	\$50.00
Net to Agent		\$49,493.00
Extra Payment Options	 ⊕ Add item	
Referrals, Bonuses, Deductions, Concessions		

2. In the Add Item form, first select the type of deduction:

Outside Referral - referral fee that is sent to another broker. It is leaving my brokerage and paying for a lead.

Use Case: When an agent needs to pay out a referral fee to another brokerage.

Inside Referral - a portion of the commission that is sent to an agent inside your MC

Use Case: As an agent, I would like to send a referral fee to an agent inside my Market Center.

Deduction (debit) - payment for an expense incurred by the agent, paid from the agent's net commission by the MC

Use case: \$175 transaction fee that is automatically paid to the MC

Bonus (credit) - an additional fixed amount added to the standard commission amount normally to incentivize offers in a specified time frame.

Use case: Your Broker's fee.

Concession - an amount of the commission generally owed to the agent but waived in order to get the deal to close.

Use case: An agent could waive a portion of the commission to cover a home warranty to alleviate buyer fears from the results of an inspection. It's a tracking mechanism, not everyone uses it.

3. Once you select the type, complete the corresponding form, keeping an eye on the required fields (these will be different for each type). Click **Add** when finished.

4. Click **Save Changes** when you're finished.

Nonprofit Deductions		-\$100.00
<hr/>		
KW Cares	<input type="text" value="\$50.00"/>	\$50.00
KW Kids Can	<input type="text" value="\$50.00"/>	\$50.00
<hr/>		
Net to Agent		\$49,493.00
Extra Payment Options		⊕ Add item
Referrals, Bonuses, Deductions, Concessions		
<input type="button" value="Cancel"/>		<input type="button" value="Save Changes"/>

Add Another Agent

1. If you need to add an agent split, you will enable this functionality, by clicking **Add Another Agent**. (I.E. Team splits or Productivity Coaching splits)

Payment [+ Add Another Agent](#) [+ Add Co-Broker Payment](#)

Jessica Campbell [Edit Agent Payment](#)

Agent Units	Agent Gross Commission	Net Pay to Agent	Payment date
1.0	\$73,500.00	\$49,493.00	06/19/22
▼ PAYMENT BREAKDOWN			
Agent Gross Commission		\$73,500.00	

2. In the Add Agent form, *start typing the agent's name* and **select the name from the drop-down list**. You will only see a list of agents from your Market Center. If you are adding someone outside your Market Center, see the **Agent Payment** section to learn how to add that.

Payment [+ Add Another Agent](#) [+ Add Co-Broker Payment](#)

Jessica Campbell [Edit Agent Payment](#)

Agent Units	Agent Gross Commission	Net Pay to Agent	Payment date
1.0	\$73,500.00	\$49,493.00	06/19/22
▼ PAYMENT BREAKDOWN			
Agent Gross Commission		\$73,500.00	


3. Now you can distribute units and commission totals to the secondary agent. When you make the adjustment to the unit, click **Calculate Commission** and the Agent Gross Commission will update.

Add Another Agent ✕

Agent Name*

Agent Units*

Agent Gross Commission*

 [Calculate Commission](#)

Repeat this process to distribute the unit and commission totals to as many agents as you need. As you add secondary agents, the *unit totals must equal 1* and *commission totals must add up to what is shown in the the Pricing Details section at the top of the page*.

4. Enter the additional deductions as needed, then click **Save Changes**.

Add Notes and Submit Commissions

1. Before you submit, you can click + Add Note, on the right side of the page, to leave a note for your MCA or Compliance Coordinator. They will see this note as they are reviewing the Commission request for this Opportunity.

Summary ! Open


Total Commission	\$73,500.00
<hr/>	
Pay to Office	\$26,600.00
Associate Royalty	\$4,410.00
Company Commission	\$22,050.00
Additional Deductions	\$20.00
Nonprofit Deductions	\$120.00
<hr/>	
Pay to Agents	\$46,900.00
Jessica Campbell	\$23,400.00
Nicole Burton	\$23,500.00
<hr/>	

+ Add Note

Submit

2. Once your unit and commission totals are balanced and each agent's deductions have been entered, click **Submit**, on the right side of the page.

Summary

 Open


Total Commission	\$73,500.00
<hr/>	
Pay to Office	\$26,600.00
Associate Royalty	\$4,410.00
Company Commission	\$22,050.00
Additional Deductions	\$20.00
Nonprofit Deductions	\$120.00
<hr/>	
Pay to Agents	\$46,900.00
Jessica Campbell	\$23,400.00
Nicole Burton	\$23,500.00


 Add Note

Submit

3. After you click Submit, [some error banners may appear beneath the summary](#) if there is information that is incomplete or missing from the commission request. If that happens, make the necessary changes then resubmit.

Submit

 Missing information: Contract Date

 Remaining Unit Balance: 0.500 Unit

Agent unit values must total to 1.0

4. If you have not already opted in to donating to either KW Cares or KW Kids Can, a pop-up will appear giving you the option of doing so. Either click **Skip Donation and Update**, or select a donation amount for either organization, and click **Donate and Submit**.


- You can also check the box labeled "Apply this same donation to all of my future commissions" if you want to set these as your default charitable donations.

If you haven't set up Recurring Charitable Donations or entered a donation into the Commission Request, this pop-up defaults the KW Cares and KWKC donations to \$10.


If you don't want to donate, ensure you click **Skip Donation and Update**.

Charitable Donations

Thousands of associates have contributed to support the missions of KW Cares and KW Kids Can. Join them by sharing a portion of your commission as a one-time tax-deductible donation



KW Cares provides emergency financial assistance to qualified members of the KW family in need. [Learn more.](#)



KWKC empowers the next generation of leaders and entrepreneurs with the tools to remove limiting beliefs, take action and live a big life. [Learn more.](#)

Nicole Burton
Combined Donation: \$20

KW Cares:

KW Kids Can:

Apply this same donation to all of my future commissions. ⓘ

- Once your MCA or Compliance Coordinator reviews this, they will either accept or return the Compliance Request. You should receive a Command notification, which will let you know either way.
- If your request is returned, they will leave a reason for the rejection. Follow the steps above to correct any errors and resubmit.
- If the deal falls through after your submitted Commission has been approved, you can [send a termination request](#) to your compliance team, which will allow you to then accept a new offer and submit a new Commission request.