

Creating a Status Update - ABC Team

ABC Team uses **Google Calendar** to provide quick and easy file updates for the **XYZ Team**.

Naming the Calendar Item

Funder Initials - XYZ Initials - File # - Lender Name - (Add cash or refinance when applicable) - Status

Status Guide

B-Docs Sent: Buyer docs sent to lender; waiting on Seller docs

Need B-Docs: Seller docs in; waiting on Buyer docs or funds

Docs Needed: Waiting on Buyer and Seller docs

No B-Signing: Seller has been scheduled, waiting on Buyer signing to be completed

Need Auth: Pending Lender funding review

Need S-Docs: Buyer Docs sent, still need Seller docs

Conds Needed: Waiting on Lender Conditions

Conds Sent: Conditions sent to Lender, waiting on funding authorization

Released: File has been released

Calendar Color Guide



Default - No updates



1 Item Pending



File Released



New File



Closing Date Delayed/
Extended



File Cancelled