



PROCEDURE FOR EM & CLOSING CHECKS

When a contract states the EM is to be held by our company, CBBullard, here is what everyone must do:

Agents

- Bring check to office, and scan a copy for yourself to add to Dotloop.
- Place check inside a certain envelope.
- If you're at Pike County / Zebulon, on the envelope, sign your name & info.
- Do this by 3:00PM, and Julia from accounting will issue payment on the same day. That's an advantage of our company – same day payment.

Admins

- An admin uses the information on the envelope to see if new checks are added.
- If they see an EM check, they will record a new contract on the daily accounting sheet. *(Remember that EM must be copied to Dotloop before its contract may be recorded on the daily sheet. Learn more in the manual about the daily sheet.)*
- If they see a closing check, they will record a closing check on the daily accounting sheet.

Office Managers / Managing Brokers

- Mail the envelope once a week, or have the admin mail it. Use pre-paid UPS packages from the accounting office.



COLDWELL BANKER

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