OFFER ACCEPTED

Contract Executed: In-House Steps

Once a contract is executed, this exact sequence runs every time — same order, same templates, no skipped steps.

- Update Statuses
- FUB Notes
- Slack Post
- 3 Dotloop Emails
- Meet Your TC
- Deadlines

Be on top of these the moment the contract is secured

Everything on this page happens right away — not next week. The next few pages walk each one through in detail.

IN-HOUSE — DO THIS FIRST

- Dotloop — change the status
- Follow Up Boss — change the stage
- Request your TC in Slack
- Add the details to FUB — two separate notes

WITH YOUR BUYER — SAME DAY

- Escrow deposit — remind them of the exact due date in their contract
- Association approval — they must apply within 5 days of contract acceptance
- Inspection — schedule it immediately if they have an inspection contingency

STAY AHEAD OF THE CLOCK

- Book the inspection early enough that the report is back days before the deadline — never on it
- Loan commitment is typically 30 days. If your buyer is paying cash with an appraisal contingency, have them order the appraisal right away
- If the appraisal contingency is tight, call the lender with a friendly reminder — don't wait and hope

Do your best never to negotiate on the day of a deadline. Have credits and repairs agreed with the seller before you get there.

STEP 1

Update every status first

PURCHASE OR SALE

- Follow Up Boss — change the stage to Under Contract
- Dotloop — change the status to Under Contract

IF IT IS A LEASE

- Dotloop — change the status to LEASED
- Follow Up Boss — change the stage to Under Contract

Do this before anything else. Every step after this depends on the file's status being accurate.

STEP 2 · TAG @JHES

FUB note: announce & tag the team

WITH ALL TRANSACTIONS YOU WILL MAKE 2 SEPARATE NOTES IN FOLLOW UP BOSS.

THIS IS NOTE #1

Open Follow Up Boss and make your first note on the file.

NOTE TEMPLATE (PURCHASE OR SALE)

Tag @Jhes Calvar and @Jill Watson

Under Contract — Closing Date (DATE OF CLOSING)

NOTE TEMPLATE (LEASE)

Tag @Jhes Calvar and @Jill Watson

LEASED: MOVE IN DATE

Then open a second note on the file — see the next slide for the detail template.

NOTE #2 on file — Under Contract

Tag @Jhes Calvar. Fill in every field that applies to your file. If your file is a LEASE, continue to page 106.

NOTE TEMPLATE — UNDER CONTRACT · FOR PURCHASE OR SALE

Under Contract:
Address:
Source:
Client's name and/or LLC: (purchaser name)
Effective Contract Date: (date)
Purchase Price: $ (amount)
Inspection deadline: (how many days and date from effective date)
Appraisal deadline: (how many days and date from effective date)
Escrow: (amount, due date, and how many days after effective date)
Second Escrow: (amount, due date, and how many days after effective date)
Commission: (amount and paid by seller or buyer)
Lender information: (lender information)
Title information: (title contact information)
Listing agent contact info — name, phone, and email: (listing agent information)
Transaction fee paid by buyer: (amount)

LEASED — Note #2 in FUB

Tag @Jhes Calvar. Use this version instead when the file is a lease.

NOTE TEMPLATE — LEASE

Address:
Source:
Client's name and/or LLC: (tenant name)
Effective Contract Date: (effective contract date)
Lease Term: (term of lease)
Monthly Lease Amount: (amount)
Deposit Amount before move in: (amount)
First month: (amount)
Last month: (amount)
Security Deposit: (amount)
Association Deposit: (amount)
Pet Deposit: (amount)
Commission amount: (amount and paid by tenant or owner)
Move-in date: (date)
Escrow is being held by: (name of company and info)
Title information: (if any)
Listing agent contact info — name, phone, and email: (contact info of leasing agent)

STEP 3

Post in Slack: New Pending

Go to the New Pending channel and post the version that matches your file.

SLACK POST TEMPLATE

PURCHASE OR SALE

NEW PENDING — PLEASE REQUEST TC
(Address of property)
All details are uploaded in FUB

[Paste the link to the client's Dotloop file]
[Paste the link to the client's Follow Up Boss file]

SLACK POST TEMPLATE

LEASE

NEW PENDING — LEASED — PLEASE REQUEST TC
(Address of property)
All details are uploaded in FUB

[Paste the link to the client's Dotloop file]
[Paste the link to the client's Follow Up Boss file]

Link to the client's specific file — never the link to one document, or your whole database.

STEP 4

Email #1: to the listing agent

In Dotloop: select all executed documents → Share → select the listing agent → View Only access → Attach as PDF → write this custom message:

CUSTOM MESSAGE

Congratulations!

We are officially under contract. Attached is the fully executed contract for your records.

I look forward to working with you throughout the transaction and coordinating together to ensure a smooth process and a successful closing for all parties involved. Please let me know if there is anything needed from our side as we move forward.

Thank you, and I look forward to working together.

Attach as PDF, then Share.

STEP 5

Email #2: to lender, title & attorney

Select all documents → Share → select lender, title, attorney (whoever is involved on the file) → View Only access → this custom message:

CUSTOM MESSAGE

Good evening,

(Introduce yourself — your name, the team and brokerage you're with, and which side of the transaction you represent.) Attached is the file. I look forward to working with you and your team during this transaction.

Address:
Please find the client information below:
Client Name:
Client Phone Number:
Client Email:

My contact information:
Name:
Phone:
Email:

Please confirm receipt of this file and let me know if any additional information or documentation is needed at this time.

I look forward to working with you and your team throughout the process of this transaction and ensuring a smooth closing.

Thank you,

Attach as PDF, then Share. Then call title and lender to introduce yourself: "Hi, my client's file is with you — please reach out if you need anything." A 2-minute call keeps the file moving.

STEP 6

Email #3: to your client

Send all documents as View Only access, with this custom message:

CUSTOM MESSAGE

Congratulations! You are officially under contract! We are excited to move forward and begin the next steps toward a successful closing.

Shortly, you will hear from our Transaction Coordinator, who will assist in managing the transaction timeline and making sure we stay on track with all important contract deadlines and requirements.

Important Next Steps:

Escrow Deposit: Your escrow deposit is due within 3 days of the effective date of the contract. Please connect with the title company as soon as possible to obtain the official wiring instructions and complete the deposit.

Important Wire Reminder: Please be aware of your bank's wire transfer cutoff times, as processing times can vary. We recommend initiating the wire early to ensure the funds are received within the required timeframe. Always verify wiring instructions directly with the title company before sending any funds.

Association Approval (If Applicable): If the property is located within an association, please contact the association immediately to begin the approval process. Approvals can sometimes take 30 days or longer, and starting right away helps avoid delays, extensions, or issues with the scheduled closing date.

We are excited to guide you through the rest of this process and look forward to a smooth, successful closing. Please don't hesitate to reach out with any questions along the way. Congratulations again!

STEP 7

Meet your Transaction Coordinator

Your TC will reach out to you first, then your clients and all parties on the file. From there, they own the file from contract to close alongside you.

- Every deadline gets tracked — inspection, appraisal, escrow, closing — so nothing quietly slips
- They're your go-to if any part of the file needs help, from a missing document to a stuck party
- They keep communication moving between you, the client, lender, and title so you're not chasing every update yourself
- They free up your time to focus on the relationship and the next deal, instead of babysitting deadlines

A great TC is one of the biggest reasons a file closes on time and stress-free — lean on them.

What to expect once your TC is assigned

Here's the order it usually happens in — so you know what's coming and what's needed from you.

- Your TC reaches out to you first, by email and/or text, to introduce themselves
- They'll send you a document asking how you want them to communicate with your client — text, email, or phone. Keep an eye out for it and send it back quickly, because everything after this depends on it
- They go into your file, reorganize every document properly, and review all of it along with every deadline on the contract
- Once that review is done, they send a welcome email introducing themselves as your transaction coordinator to the buyer, title, the other agent, the attorneys if there are any, and the lender
- From there they stay on top of the file — for example, following up with the lender to ask how the loan commitment period is progressing and whether there are updates
- If your file is missing any document they need, your TC will let you know
- They stay in communication with you through the entire process. If you need help with anything, reach out to them

READ EVERY EMAIL AND STAY FULLY PRESENT IN THE TRANSACTION. Strong communication with your TC is what gets you to a successful closing.
They will help you remember deadlines — but never forget that the deadline is your responsibility, always.

KNOW YOUR DATES

Every important deadline in a transaction

Put all of these on your calendar the day the contract is executed — not the week they're due.

- Escrow deposit — typically due within 3 days of the effective date. A second escrow, if the contract calls for one, has its own amount and its own date
- Inspection period — varies by contract. Schedule it immediately so there's time left for a specialist if the report calls for one
- Appraisal — ordered by the lender, with the contingency date set by your contract
- Loan commitment — typically 30 days. The date the buyer must have the lender's formal commitment letter in hand, a step beyond a pre-approval or DU. Missing it without an extension can put your buyer in default
- Association approval — start the application the day the offer is accepted. Approvals routinely take 30 days or longer and some boards meet only once a month. This is the deadline that delays closings most often
- Title commitment — review it as soon as it arrives, not the week of closing
- Final walk-through — before closing, coordinated with the other agent
- Closing date — plus any extension, confirmed in writing with every party

All of these are counted in calendar days — weekends and holidays included. If a deadline lands on a weekend or holiday it moves to the next business day. Your TC helps you track them; knowing them is still your job.

STEP 8

DA & Compliance: the final checks before you're clear to close

Two more reviews happen behind the scenes before your file gets the green light.

Once your file is far enough along, it goes through Disbursement Authorization (DA) and Compliance — two internal reviews that happen before you're told you're clear to close.

- DA confirms every payout on the file — who's getting paid, how much, and from where — then sends a detailed breakdown to title to be added to the final ALTA settlement statement
- Your TC will also request that Compliance review your file — they'll reach out directly if anything is missing or if signatures are still needed
- Get ahead of it: make sure your file is complete well in advance so a missing document or signature doesn't cause a last-minute closing delay
- Once DA and Compliance are both complete, your TC will let you know you're clear to close

The earlier your file is clean, the earlier DA and Compliance can clear it — don't wait until the week of closing to find out something's missing.