FILE COMPLIANCE AND COMMISSION REQUEST IN COMMAND

1. **FILE COMPLIANCE**
2. Before you start a file in Command, you MUST have your client as a contact in Command. If your client is already a contact in Command, skip to the next step. If your client is NOT a contact: click to enter Contacts, then Add Contact. Enter their first and last name, email address, and phone number.
3. To start a new file in Command, click to enter Opportunities, then Create Opportunity.
4. Any field where you see * is required. Opportunity Type is important to keep in mind because this will change the file checklist options you have access to for that Opportunity type. For example, if you have a:
    a. Residential Listing – you would choose the Listing type
    b. Residential Purchase – you would choose the Buyer type
    c. REO Listing – you would choose the Listing type
    d. REO Purchase – you would choose the Buyer type
    e. Vacant Land Listing – you would choose the Listing type
    f. Vacant Land Purchase – you would choose the Buyer type
    g. Commercial – you would choose the Listing type
    h. Rental listing – you would choose the Landlord type
    i. Rental tenant – you would choose the Tenant type
    j. Seller Referral – you would choose the Listing type
    k. Buyer Referral – you would choose the Buyer type
    l. New Home Build – you would choose the Buyer type
5. Under Client, search for the contact you have in Command for this file
6. For the Opportunity Name, type in the full address of the listing
7. Fill in your Commission rate
8. For Opportunity Phase and Opportunity Stage, you can leave those default for now as there are now Phases or Types for Under Contract or In Escrow at this point. We will change them in a few steps
9. Click Create
10. You must have an address tied to each Opportunity. If you're doing a listing click Select from Listings at the top, search for your listing, and click Select. If you're not doing a listing, click the pencil next to Property and fill in the address information
11. Next click the pencil next to Key Information
12. You now have more Opportunity Phases, and Stages, to choose from. Choose the appropriate one, make any other changes (such as Contract date so you don't need to worry about this later in the Commission request stage) you may need, and click Save
13. Now we can start the file compliance phase. Click the Documents tab
14. Click Pick checklist type and click on the appropriate checklist that you need for this file
15. Each checklist in our Market Center is broken up into 2 or 3 sections in Command (depending on file type) and are listed to the left as Listed, Under Contract, and Closed
16. If you have each document in its own PDF on your computer, click Drop your file here for each corresponding document. If you have all documents in a single PDF, you can click the 3 dots ••• next to Attach Files From and click Split & Attach PDF. You'll do this step for Listed, Under Contract, and Closed
17. If you had additional documents that don't have a placeholder in the checklist, such as a second addendum, click the 3 dots next to Attach Files From and click Add Document.

18. Once you upload all of the appropriate documents, click Submit to MC. When you submit a file for review you will see the status change to Submitted to the left
19. Once you have submitted all of the appropriate documents to the MC, click the Add comment button, type @ and you'll see a list appear. Click Gary Longobardo, then type in a message to notify Gary that you have submitted a file to him for review, then click Add Reply. THIS IS VERY IMPORTANT! IF YOU DO NOT DO THIS GARY WILL NOT BE NOTIFIED TO CHECK YOUR FILE! Also, please try and keep ALL correspondence to Gary in the Listed section Add Comment button. This way all correspondence is in 1 area, rather than 3.
20. When Gary reviews your documents, he will either approve them or reject them. If approved, you will see the file status change to Approved and no further action is required. If rejected, you will see the file status change to Returned and see next to the file name. When you hover your mouse over that icon you will see the reason why the document was rejected. You will need to click the ... next to the document and choose Update. This will allow you to upload a new document in place of the original.
21. If you have a listing, and the buyer falls out of escrow, rather than starting a whole new Opportunity you can simply create a new version of the Under Contract documents checklist. To start a new version of the Under Contract documents, click the drop-down arrow next to Under Contract Under Contract ▼ 0 of 59 documents uploaded, click Add version, name it whatever you would like, then click Create New Version. Doing this WILL NOT delete any of the documents you previously uploaded for the buyer that fell out of escrow. Those will simply stay under the original version.
22. **COMMISSION REQUEST**
23. Click the Offers & Commissions tab
24. Before you can submit a Commission request you must have an approved offer in the file first. Click Add New Offer
25. Fill out all required fields, then click Create & Accept Offer
26. If you need to make any changes to any field, click Edit General Information
27. For any donations/deductions click Edit Agent Payment. If you are:
    a. Making a donation to KW Corona Cares, scroll down and click Add Deduction under Extra Payment Options, type in "KWC" and click on KWC Cares, enter the donation amount and click Add Deduction
    b. Paying a TC Fee, scroll down and click Add Deduction under Extra Payment Options, type in "KWTC" and click on KWTC, enter the TC amount and click Add Deduction
    c. Paying an Outside Referral, click Add Outside Referral under Commission Information, fill out all required fields (the address would be their office address), then click Add Outside Referral. Make sure the outside referral amount auto-populates under the Agent Payment section as well
    d. Making a donation to KW Cares, KW Next Gen scroll down and enter the donation amount under KW Cares or KW Next Gen and click Save
28. If you need to leave any special notes for Brian, such as the seller paying the TC fee, click Add Note under Summary, fill in the note, then click Save Changes
29. Once everything is added and looks correct, click Submit to submit your commission request to the MCA.
30. You and your TC (if you are using one) should receive an email from Brian with an Initial DA attached. PLEASE open this email and review the attached DA. If all of the numbers are correct, please reply to the email with "approved" in it. If any changes need to be made, please let your TC know.