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
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 General Information
12. You now have more Opportunity Types, 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 under Start a Transaction 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 Gina Reyes, then type in a message to notify Gina that you have submitted a file to her for review, then click Add Reply. <u>THIS IS VERY IMPORTANT! IF YOU DO NOT DO THIS GINA WILL NOT BE NOTIFIED TO CHECK YOUR FILE!</u>
20. When Gina reviews your documents, she 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. **COMMISSION REQUEST**
22. Click the Offers & Commissions tab
23. Before you can submit a Commission request you must have an approved offer in the file first. Click Add New Offer
24. Name the offer then click Create Offer
25. Fill out all required fields under Offer Details, Parties, Terms, and Agent Analysis. On the Terms tab, even though the Cash and Finance Amounts fields don't have an *, you must fill one or both fields out to equal the Sales Price. Click Save.
26. Click Accept next to the offer you just added
27. Click Manage Commission
28. If you need to make any changes to any field under General Information, click Edit General Information
29. For any donations/deductions click Edit Agent Payment. If you are:
    a. Making a donation to KW Corona Cares, scroll down and click Add item under Extra Payment Options, choose Deduction, and fill out all required fields (the address would be the office address), click Add, then click Save Changes
    b. Paying a TC Fee, scroll down and click Add item under Extra Payment Options, choose Deduction, and fill out all required fields (the address would be the office address), click Add, then click Save Changes
    c. Paying an Outside Referral, scroll down and click Add item under Extra Payment Options, choose Outside Referral, and fill out all required fields (the address would be their office address), click Add, then click Save Changes
    d. Making a donation to KW Cares, KW Kids Can, or towards a BOLD Scholarship, type in the appropriate amount in the necessary field, then Save Changes
30. If you need to leave any special notes for Lauren, such as the seller paying the TC fee, click Add Note under Summary, fill in the note, then click Save Changes
31. Once everything is added and looks correct, click Submit to submit your commission request to the MCA.