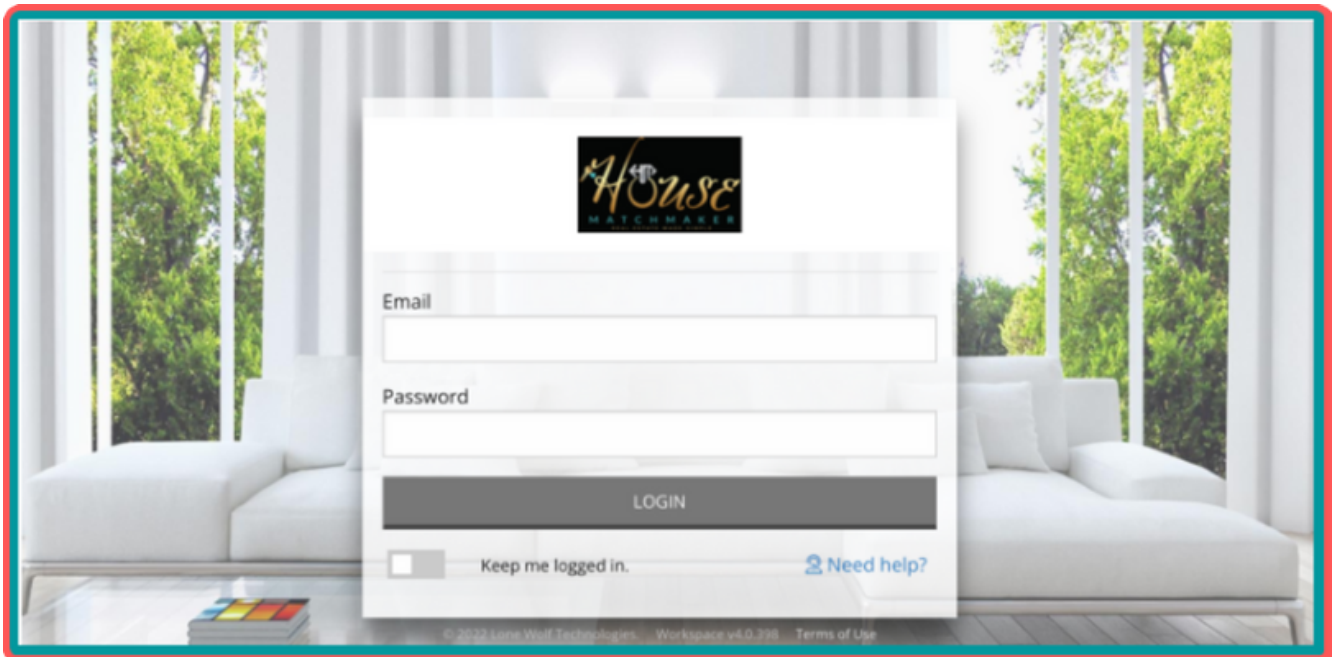
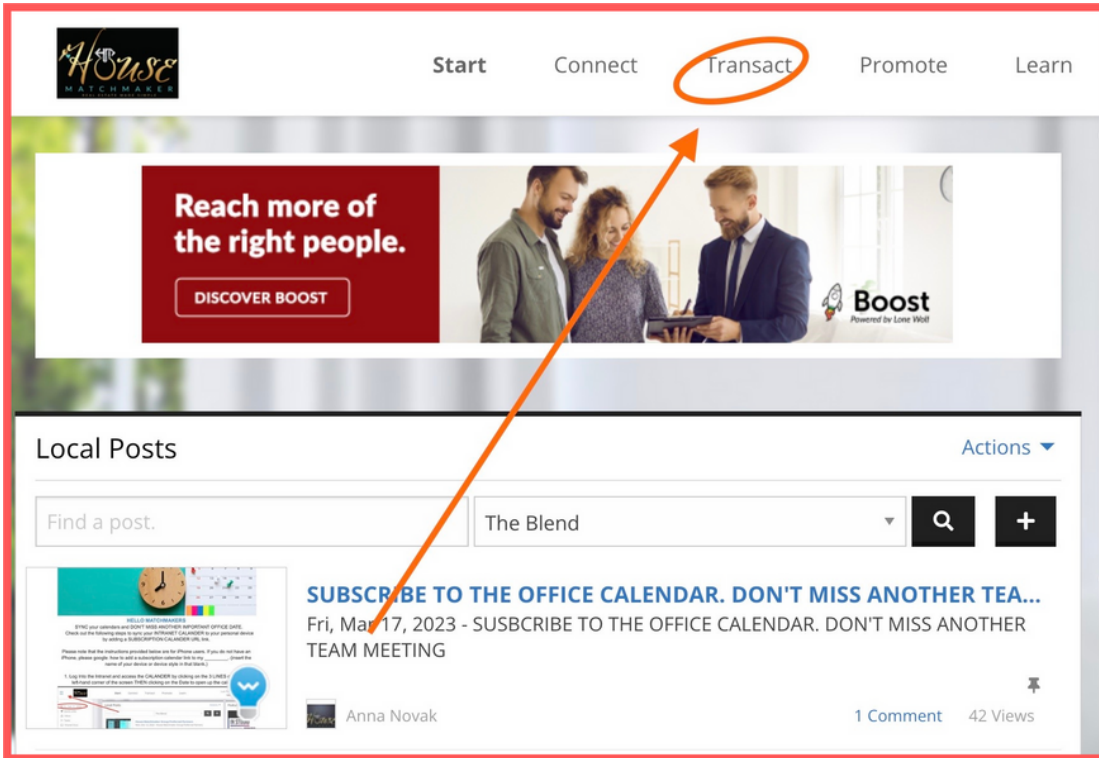


Section 7: GET PAID USING HMMK INTRANET FOR COMPLIANCE

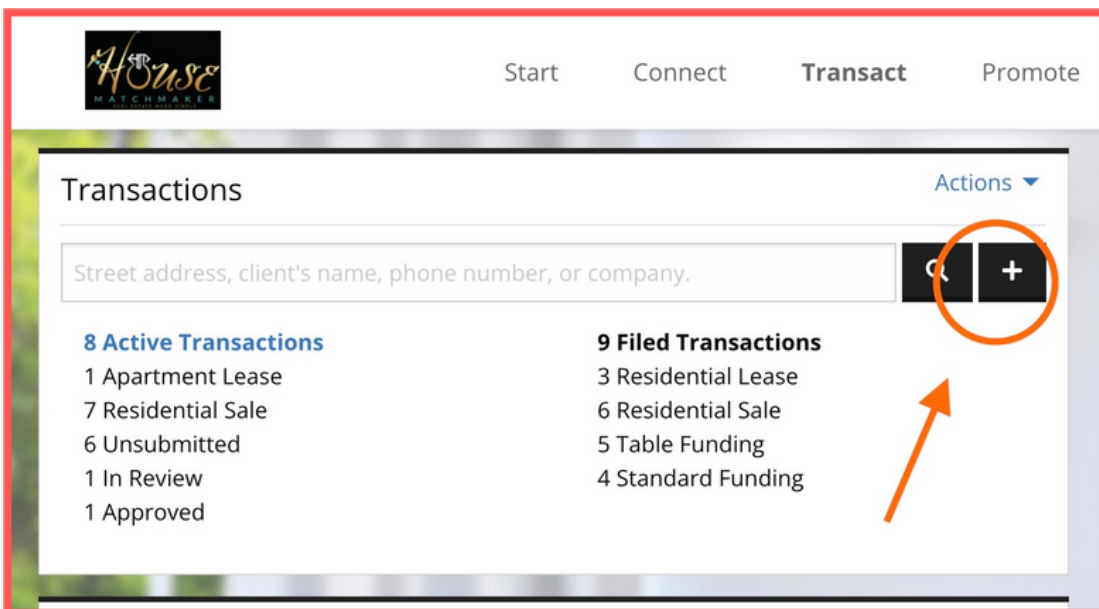
Log in to Intranet:



STEP 1: Click 'Transact' on the Navigation bar



STEP 2: Click the plus (+) icon to Begin a NEW Transaction



Step 3: Choose the type of transaction you are working with.

*We usually use Residential

Add Transaction

What category of transaction are you creating?

Residential As defined by your brokerage and REALTOR® association.	Select
Apartment (Managed Building) Only used for standard property management controlled leasing.	Select
Commercial As defined by your brokerage and REALTOR® association.	Select
Referral Only You referred a buyer or seller to another agent, for a fee.	Select

Step 4: Select if its a Sale or a Lease

TRANSACT / ADD TRANSACTION

Add Transaction

✓ You selected the 'Residential' category. [Change](#)

What type of transaction is it?

Sale or Sale Listing The property owner will change upon completion.	Select
Lease or Lease Listing Tenant is changing, title remains the same.	Select

5. Then Click Start

Add Transaction

- ✓ You selected the 'Residential' category. [Change](#)
- ✓ You selected the 'Sale' type. [Change](#)

Where would you like to start the transaction?

Start You are in the early stages of representing your client. (Recommended)	Select
Showing Client is actively searching for, or marketing, a property.	Select
Contract Your client's contract is written. You may still be negotiating final terms and due diligence.	Select

6. Choose which party do you represent Buyer or Seller

Which party do you represent?

Seller The current title holder of a property.	Select
Buyer The purchaser of a property.	Select

7. Start adding people. Fill in the "WHO IS THE BUYER" section by clicking on "+ Select Client".

Add Transaction

- ✓ You selected the 'Residential' category. [Change](#)
- ✓ You selected the 'Sale' type. [Change](#)
- ✓ You selected the 'Start' phase. [Change](#)
- ✓ You represent the 'Buyer'. [Change](#)

Who is the Buyer?

Not selected.

[+ Select Client](#)

Confirm & Save

If everything looks good, you are ready to create the new transaction.

[Create New Transaction](#)

8. Fill in the Client information.

Shared contacts save everyone time.

Creating duplicate contacts slows everyone down, be sure to re-use the same contacts.

First Name

Last Name

Company

Email Address

Phone Number

No email address available.

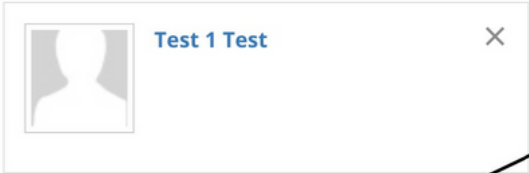
[Add New Contact](#)

9. Once we have added their information, we can now start the transaction. Click "Create New Transaction"

Add Transaction

- ✓ You selected the 'Residential' category. [Change](#)
- ✓ You selected the 'Sale' type. [Change](#)
- ✓ You selected the 'Start' phase. [Change](#)
- ✓ You represent the 'Buyer'. [Change](#)

Who is the Buyer?



+ Select Client

Confirm & Save

If everything looks good, you are ready to create the new transaction.

[Create New Transaction](#)

10. Now let's start adding the rest of the parties to the transaction by moving on to the "People" Tab

Start Connect **Transact** Promote Learn

TRANSACTION / SEARCH / SUMMARY

Test 1 Test

Ref# A2-23-0032

BUYER

Test 1 Test
Start

Summary **People** Details ³ Documents ⁶ Checklist ⁵ Expenses

Ref# **A2-23-0032** [edit](#)

Last Updated: Tue, Mar 7, 2023 7:51 PM CST by Luis Flores

History

Timeline

Started
Tue, Mar 7, 2023
moments ago

[Cancel Transaction](#)

Start Showing Contract Pre-Closing Post-Closing

11. Now we need to add the:

- **Title Company**
- The **Seller(s) | Buyer(s)**
- The Seller(s) | Buyer(s) **AGENT**
- The Seller(s) | Buyer(s) **AGENT'S BROKER**

The screenshot shows a software interface for a real estate transaction. At the top, the title is "Test 1 Test" with a reference number "Ref# A2-23-0032". The user "Luis Flores" and "Katy" are logged in. The interface has a navigation bar with tabs: "BUYER", "Test 1 Test Start", "Summary", "People", "Details" (with 3 notifications), "Documents" (with 6 notifications), "Checklist" (with 5 notifications), "Expenses", and "History". A "Submit" button is on the right. The main area is divided into two columns: "Buyer" and "Seller".

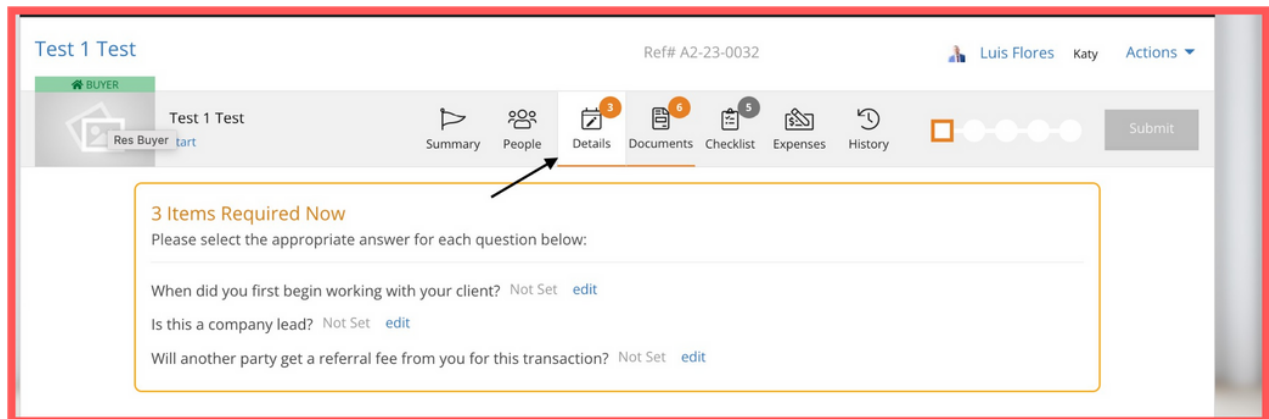
Buyer Column:

- Buyer:** A card for "Test 1 Test" with a "Send Message" button and a close icon.
- + Add Buyer**
- Buyer's Agent:** A card for "Luis Flores" (House Matchmaker, Katy) with a "Send Message" button.
- + Add Partner**
- Buyer's Agent's Coordinator:** A box labeled "Not selected."
- + Add Coordinator**
- Title Agent:** A box labeled "Not selected."
- + Add Title Agent**

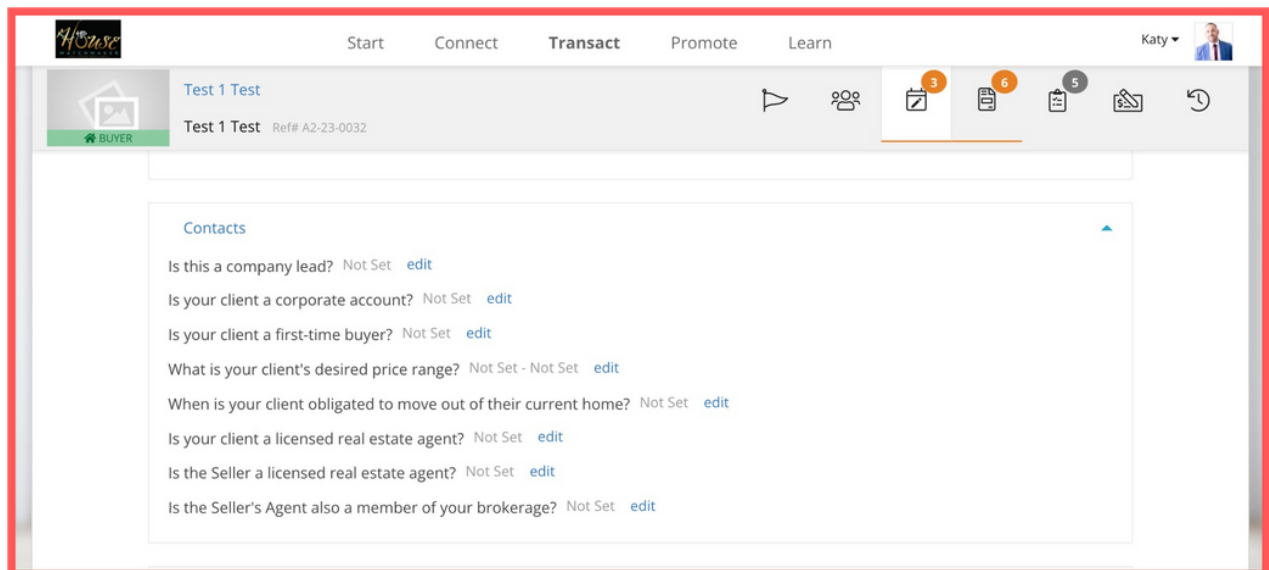
Seller Column:

- Seller:** A box labeled "Not selected."
- + Add Seller**
- Seller's Agent:** A box labeled "Not selected. Not Represented?"
- + Add Seller's Agent**
- Vendor:** A box labeled "Not selected."
- + Add Vendor**

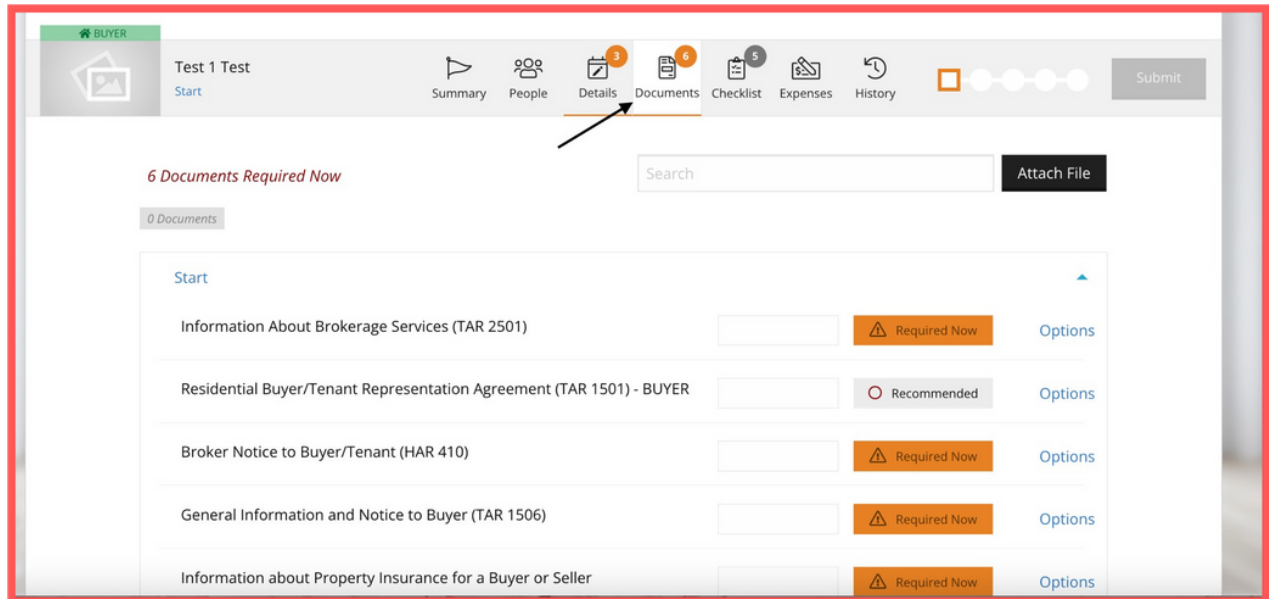
12. After Adding the people, let's add the information of the transaction by proceeding to the "Details" tab. This next section is VERY IMPORTANT



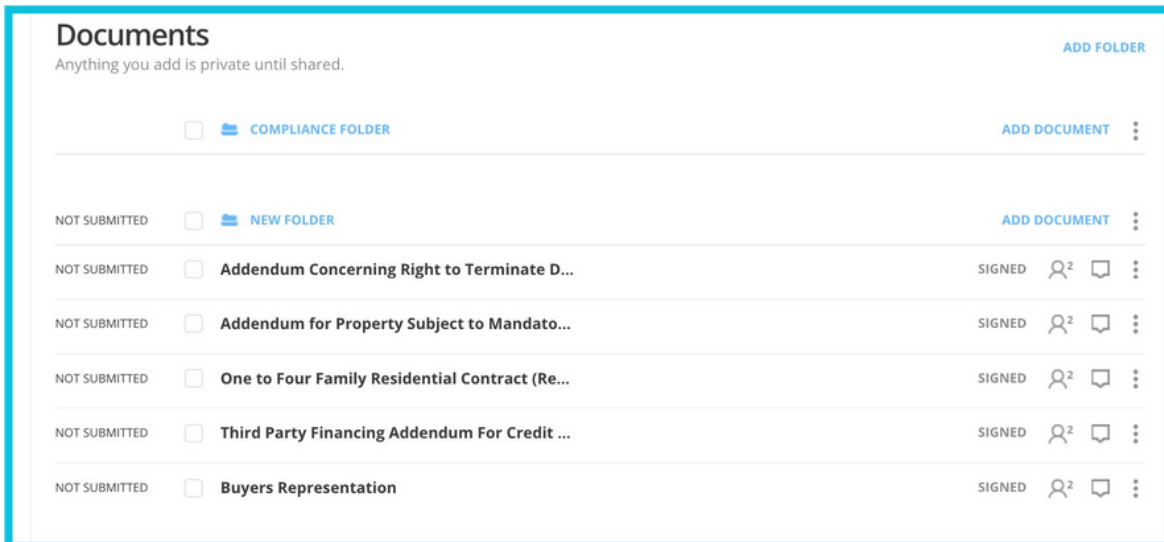
13. The System will show you step by step on what needs to be done. It will help you keep your timeline.



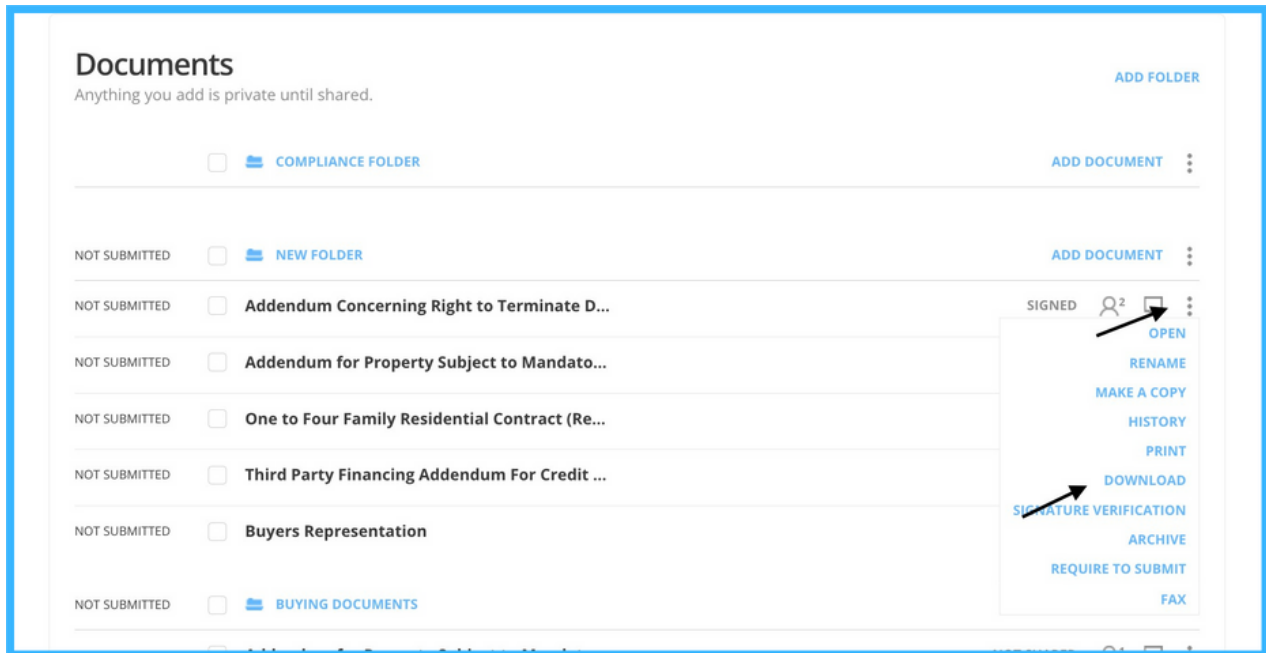
14. Once all of the information is filled, let's start uploading the Documents from DOTLOOP



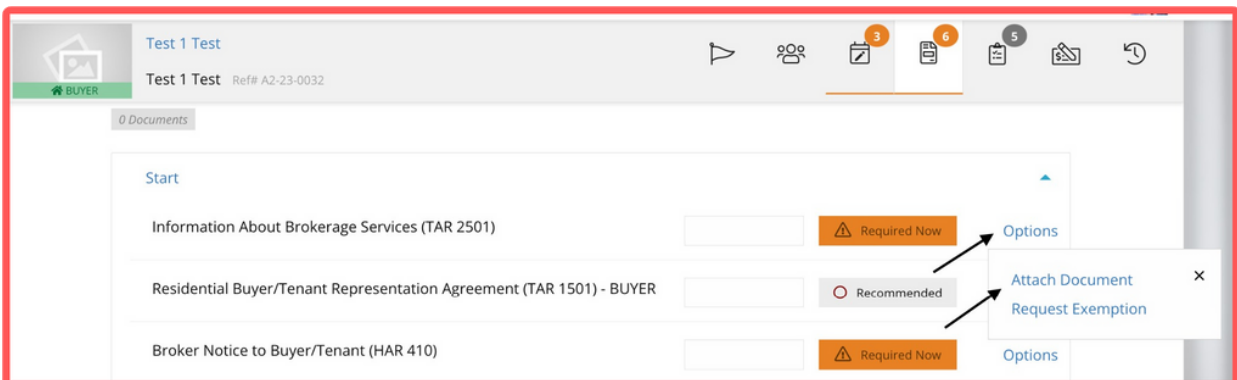
You can find these documents in your DOTLOOP transaction.



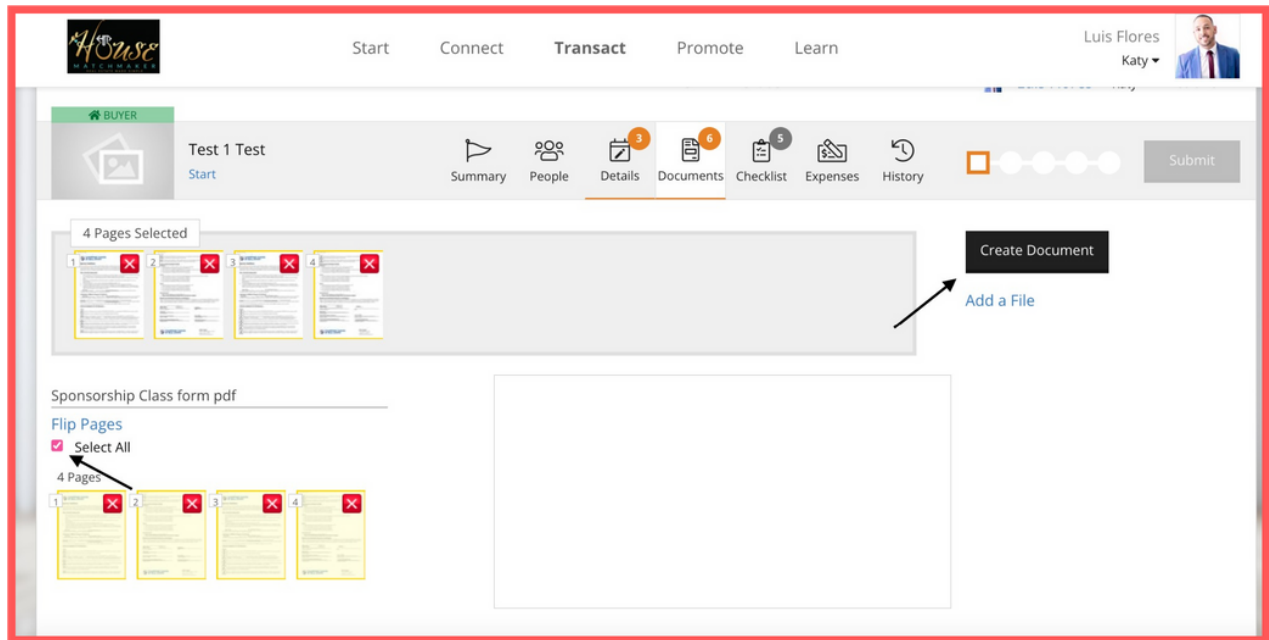
From Dotloop Download the Signed Document. Click the 3 dots and select Download



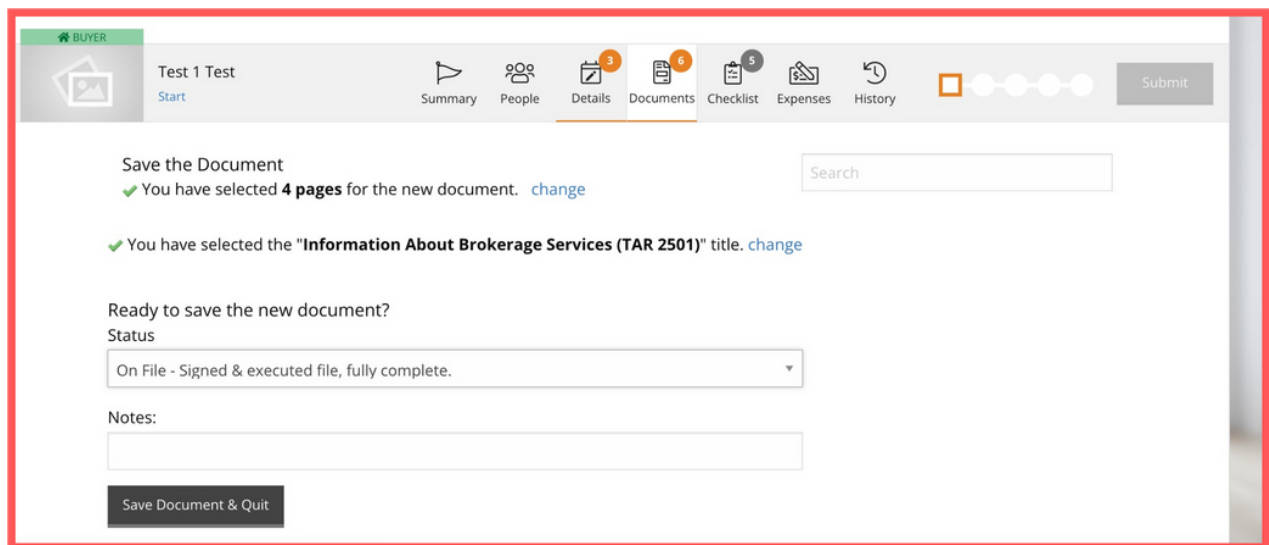
Now we are ready to upload it to the INTRANET. Click options and click attach documents.



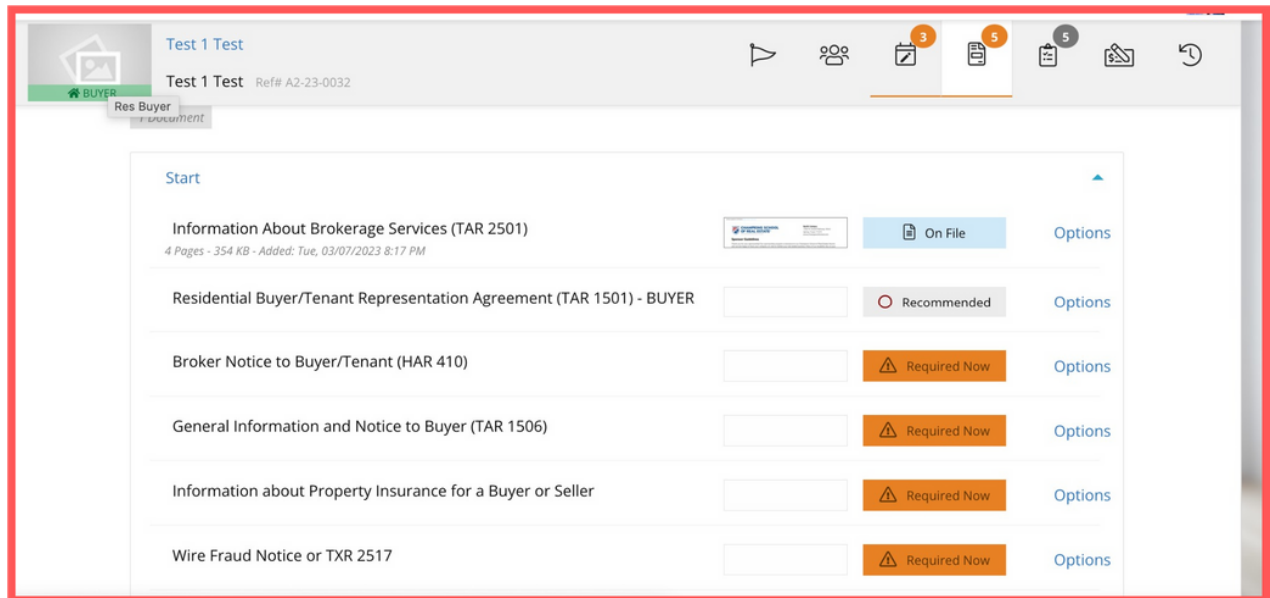
Select all pages to make sure all the pages will be uploaded and then click create document.



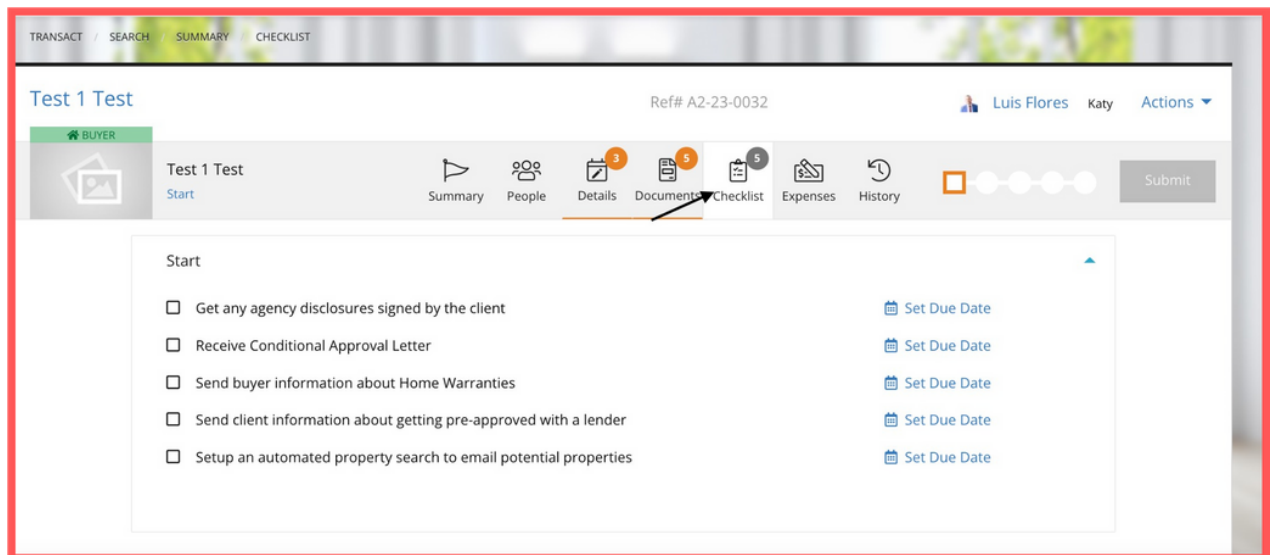
Submit the document. Click save Document and Quit



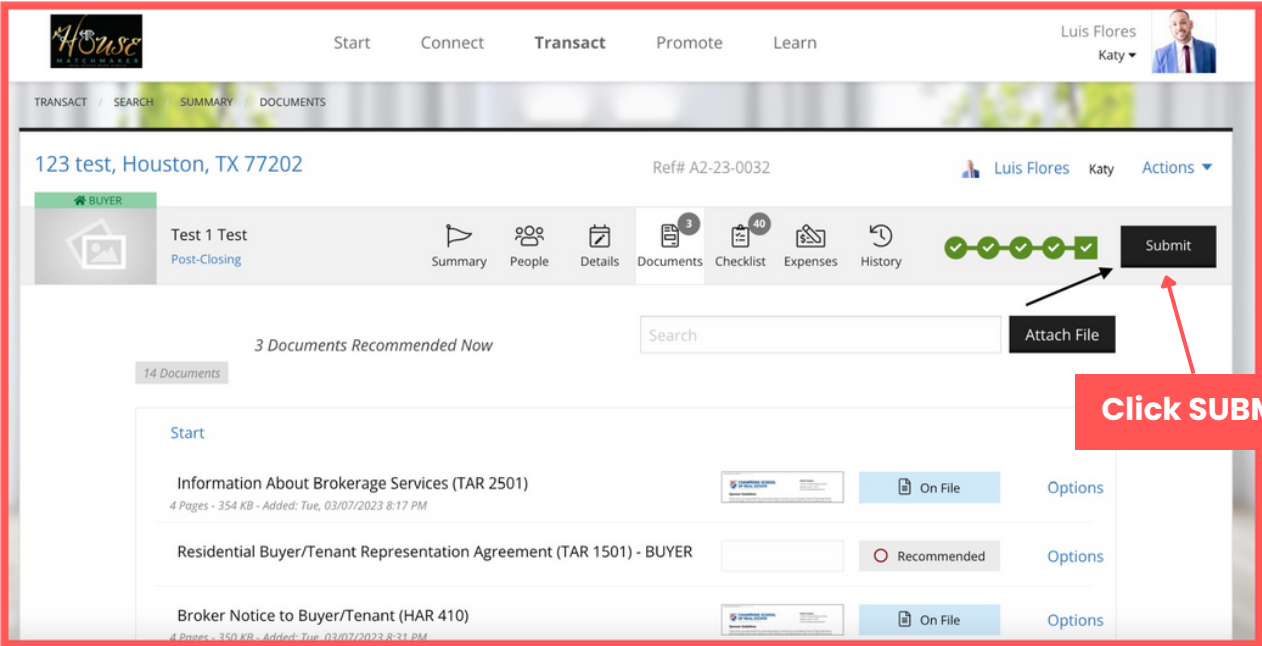
As the transaction Process it will open new tasks, new documents that need to be done.



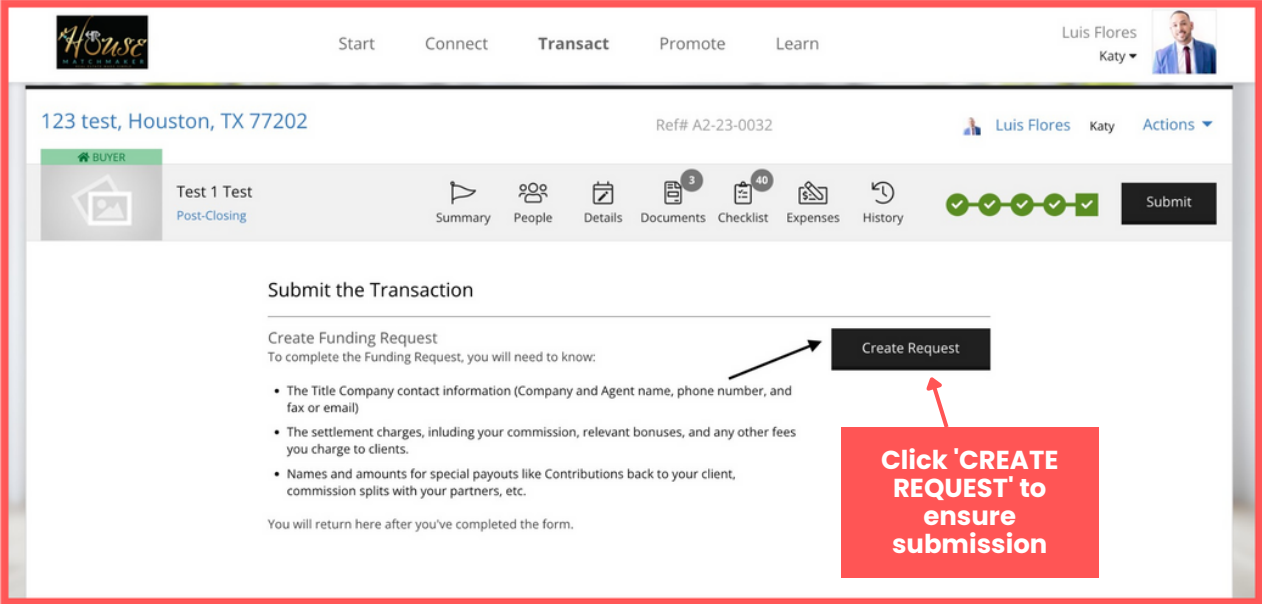
15. Now we will see the Checklist so that we can Set up the Date and we can keep track of the Transaction Timeline.



16. Once we've completed the Details, Documents and Checklist we can now submit it for review.



17. Now we have to Create the funding request. Click Create Request



18. Confirm all of the totals before the "Create Funding Request" process is completed.

13301 Lago Acero Ln, Texas City, TX 77568 Ref# A2-23-0083 Alma Flores Houston Actions

BUYER Guillermo Villarreal Post-Closing

Summary People Details Documents Checklist Expenses History

Funding Confirmation

TITLE COMPANY - Verify title company contact info.

Company Name Phone File Number (GF#)
 Platinum Title Partners L 832.203.6666 GF#23-71711-50

Contact Name Fax Email
 Sharla Jacobs sharla@platinumtitlepartner

Transaction Details
 Funding: **Table Funding**
 Buyers (Client): **Guillermo Villarreal**
 Sellers: Adams Homes Lone Star LLC
 MLS #: Not Set
 Sale Price: **\$297,400**

SETTLEMENT CHARGES - Itemize commissions and fees due for **your side** of this transaction.

Income Item	Amount	Charged To
Sale Commission (3%)	\$8,922.00	Seller
-- add an income --		
Total: \$8,922.00		

PAYOUTS - Itemize all payouts from the total settlement charges.

Payout Item	Hide	Amount	Pay To
Net Pay Due to Agent		\$4,383.00	Alma Flores
Broker's Commission Split - OVERRIDDEN		\$1,784.40	House Matchmaker Group LLC
Outstanding Office Dues		\$0.00	House Matchmaker Group LLC
E&O Insurance		\$75.00	House Matchmaker Group LLC
Match Fund Contribution		\$3.00	House Matchmaker Group LLC
External Referral [REF]	<input type="checkbox"/>	\$2,676.60	Norma Salazar
-- add a payout --			
Total: \$8,922.00			

Adding a BTSA to the commission.

BUYER
Guillermo Villarreal
Post-Closing

Start Connect **Transact** Promote Learn

Anna Novak Houston

Summary People Details Documents Checklist Expenses History

Funding Confirmation

TITLE COMPANY - Verify title company contact info.

Company Name	Phone	File Number (GF#)
Platinum Title Partners L	832.203.6666	GF#23-71711-50

Contact Name	Fax	Email
Sharla Jacobs		sharla@platinumtitlepartner

SETTLEMENT CHARGES - Itemize commissions and fees due for **your side** of this transaction.

Income Item	Amount	Charged To
Sale Commission (3%)	\$8,922.00	Seller
BTSA	\$2,000.00	Seller
Total: \$10,922.00		

PAYOUTS - Itemize all payouts from the total settlement charges.

Payout Item	Hide	Amount	Pay To
Net Pay Due to Agent		\$5,963.00	Alma Flores
Broker's Commission Split - OVERRIDDEN		\$2,184.40	House Matchmaker Group LLC
Outstanding Office Dues		\$0.00	House Matchmaker Group LLC
E&O Insurance		\$75.00	House Matchmaker Group LLC
Match Fund Contribution		\$3.00	House Matchmaker Group LLC
External Referral [REF]	<input type="checkbox"/>	\$2,676.60	Norma Salazar

Transaction Details

Funding: **Table Funding**

Buyers (Client): **Guillermo Villarreal**

Sellers: Adams Homes Lone Star LLC

MLS #: Not Set

Sale Price: **\$297,400**

Commission:

Making contributions from your commission.

Income Item	Amount	Charged To
Sale Commission (3%)	\$8,922.00	Seller
BTSA	\$2,000.00	Seller
-- add an income --		
Total: \$10,922.00		

PAYOUTS - Itemize all payouts from the total settlement charges.

Payout Item	Hide	Amount	Pay To
Net Pay Due to Agent		\$5,983.00	Alma Flores
Broker's Commission Split - OVERRIDDEN		\$2,184.40	House Matchmaker Group LLC
Outstanding Office Dues		\$0.00	House Matchmaker Group LLC
<ul style="list-style-type: none"> ✓ -- add a payout -- Additional Brokerage Split or Fee Contribution to Buyer Contribution to Seller External Referral Other... -- add a payout -- 		\$75.00	House Matchmaker Group LLC
		\$3.00	House Matchmaker Group LLC
		\$2,676.60	Norma Salazar
Total: \$10,922.00			

The title company will need a letter from YOU, for the Commission Contribution you have done. The Intranet System will automatically generate this Contribution Letter. The letter will be sent to you when your file meets compliance along with your CDA.



1333 West Loop South, Suite 880
Houston, TX 77027
Phone: 832.352.6437

June 7, 2023

To: Platinum Title Partners LLC
Attn: Sharla Jacobs

From: Anna Novak / House Matchmaker Group LLC
Re: Sale of property
@ 13301 Lago Acero Ln, Texas City, TX 77568
Buyer's Name: Guillermo Villarreal
Agent's Name: Alma Flores

Please use this letter as your authority to reduce the commission to House Matchmaker Group LLC in the amount up to \$3,000.00.

Money thus deducted (\$3,000.00) is to be applied towards buyer's closing costs or prepaid items. **All funds deducted must be shown as a credit to the buyer on the closing statement.**

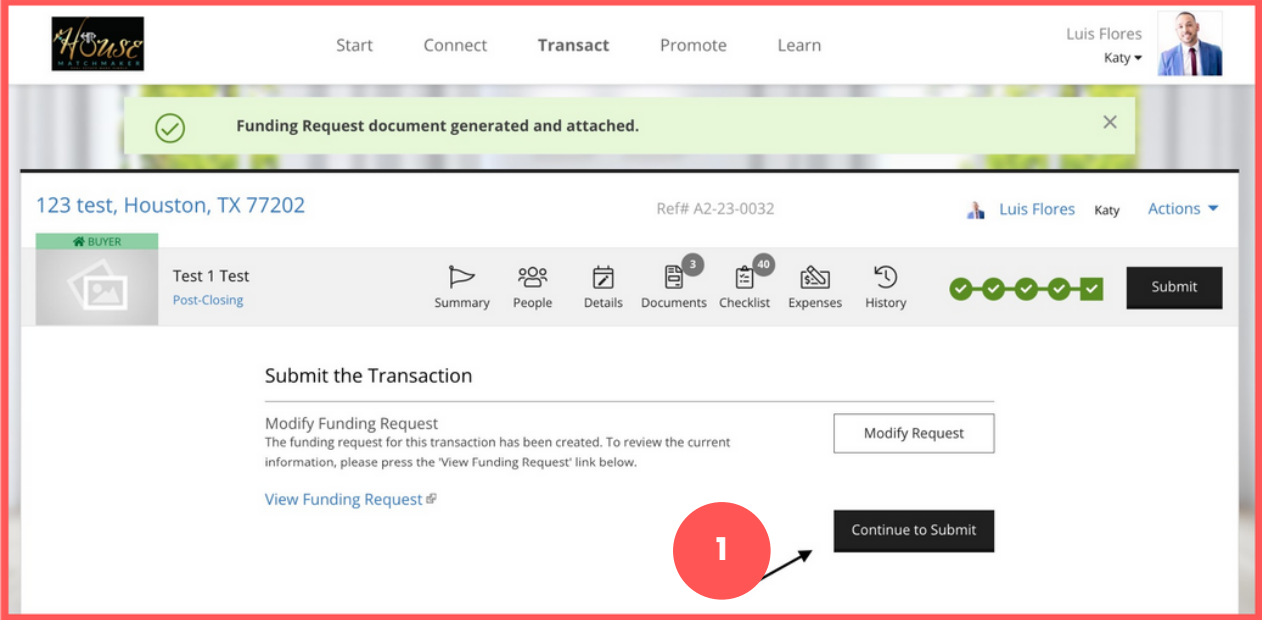
This letter should be accompanied with a CDA at closing.

Thank you,

A handwritten signature in blue ink, appearing to read "Anna Novak".

Anna Novak
Funding Coordinator
House Matchmaker Group LLC
832.352.6437

19. Then continue to submit



20. Submit the transaction (Hit 'SUBMIT' twice)

