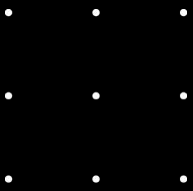
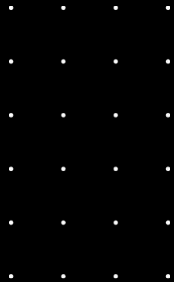


COMPASS



Manage Your Deals With Business Tracker

Our presentation will begin shortly.



What we'll Cover

- What is Business Tracker?
- Connect your NRDS ID for access to forms and e-signature
- Working with a Seller
- Working with a Buyer
- Special Situations
- Q&A

What is Business Tracker?

Business Tracker is a tool that helps you:

- Organize, manage and visualize your sales pipeline
- Prepare contracts and collect e-signatures from clients
- Connect to resources such as marketing materials, Collections, CMAs, and listing insights
- Submit final documents for Compliance review
- Request Commission payments

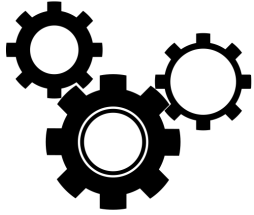
Connect your NRDS ID & Forms Library

Connecting your NRDS ID gets you access to forms/contracts to prepare your documents and collect eSignatures.

Follow these steps:

- Open the “Files” tab
- Click the three-dot menu next to Add Documents, select “Membership & Integrations”
- Enter your NRDS ID and Last Name
 - Not sure what your NRDS ID is? Click “How do I find my member ID?”
- Click **Add Form Provider** and search for the appropriate library by name, State, or MLS board

Working with a Seller



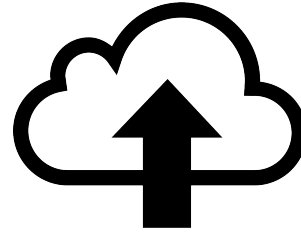
Set up your
transaction



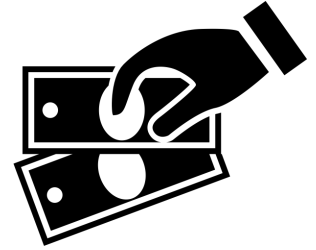
Add Listing
details



Add & accept
Offers



Upload docs
for Compliance



Request
Commission



Screenshot

Working with a Seller

Set up your transaction by following these steps:

- Create your transaction - click the **BLUE** Create button to get started and follow the prompts
- Complete the Overview tab
- Add Transaction Parties
 - Create a contact in your CRM for each transaction party ahead of time
- Follow Transaction Checklist
- Complete required details in the “Listing” tab

Working with a Seller (continued)

Prepare your documents via the Files tab:

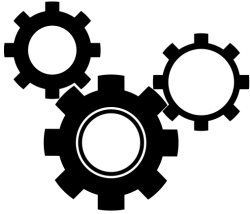
- Add forms to your transaction by clicking “Add Documents”
 - All documents are available via the Forms Library, but you can upload ad-hoc documents from your computer when needed
 - When uploading documents, the system may not automatically detect signature tabs and other fields
- Prepare each transaction document in the Files tab
- Send for signature.
 - Once prepared, select all appropriate documents and click “eSign”

Working with a Seller (continued)

Submit your documents for Compliance review:

- Complete the Offers tab
 - Add received Offers by either uploading completed offer docs or by inputting details manually. Follow this step if you need your Seller's signature, **otherwise**
 - Add an accepted the Offer
- Review the Compliance tab
 - Based on the listing details and accepted offer, you may need to provide Listing Documents, Transactions Documents and/or Closing Documents
 - Your listing agreement should have all signatures except our Broker's. The Compliance team will obtain that for you
 - Next to each required document, click **Upload** to provide your docs for review
 - Select **Transaction Forms** for documents completed via the Files tab
 - Select **Computer** if you need to upload a completed document you prepared outside of Business Tracker

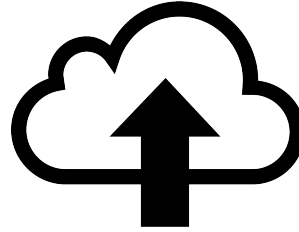
Working with a Buyer



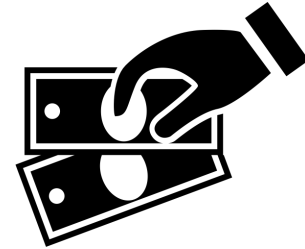
Set up your
transaction



Add & accept
Offers



Upload docs
for Compliance



Request
Commission



Screenshot

Working with a Buyer

Prepare your Offer packets and send them out for signature by following these steps:

- Set up your Buyer transaction the same as you would a Seller transaction and complete the Overview tab and the Transaction Parties
- Add your Offers
 - Most of your work will take place in the Offers tab vs the Files tab
 - Add a property by follow the prompts
 - Add transaction details by following the prompts
 - Add Documents as needed by your transaction
 - Prepare each document
 - Select documents and click **eSign** and complete signature request

Working with a Buyer (continued)

Prepare an Offer Packet (continued):

- Once Buyers signature request is complete, select **Prepare Offer/Continue Preparing**
 - Your documents will seem to have disappeared from the Property Documents, don't worry, you'll see them when you complete this step
- Add documents from Transaction (after a completed signature request), Form Library , or Upload documents
- Submit your offer
 - Follow the prompts and provide all necessary information to send to the Seller's agent.

Provide Documents for Compliance Review

Once you've completed all necessary documents for your transaction, you will need to upload/provide those documents to our Compliance team. Follow these steps:

- Access the **Compliance** tab
- Note there may be several types of documents required (e.g. Listing Documents, Transaction Documents, Closing Documents). Check each type to view all required documents of that type
- Click Upload
 - Select **Transaction Documents** if you used Files/Offers to prepare documents & collect signatures
 - Select **Your Computer** to upload documents completed outside of Business Tracker

Review Compliance Status

Once uploaded, check the Compliance tab to review status updates for each document you've provided. These are some best practices to follow:

- Statuses include: Under Review, Accepted, Rejected
- Click the **Comment** icon for any new comments or to leave a comment
 - Do not add comments if you have not uploaded a document to that item. Your comment will not be seen
- Access historical records of your deal's documents via the Documents section of the Compliance tab

Submit your Commission Request

Once your transaction has closed and you've uploaded all required Closing Documents, follow these steps:

- Access the **Commission** tab
- Complete the commission request form
 - Add fees, credits, reductions, and/or referrals as applicable
- Submit your form
 - Team Members have no access to view or change split details (Principals only)
 - Team Member submissions **must be approved by their principal agent**
 - Double-sided deals require a commission request on **both** sides

Special Situations

Certain transactions will require specific steps. Below is a list of the most common situations you may encounter:

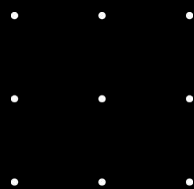
- Representing Both Sides
 - Always start by creating a Seller folder. You will only upload documents in the Seller folder
 - When adding the offer in the Seller folder, be sure to indicate that you (or a member of your team) also represents the buyer, and check the box to link a buy-side folder
 - Once your deal closes, you will need to request commission on each side
 - Only the Primary Buyer Agent will have automatic access to the buy-side transaction. If other team members need access, they need to be invited to it.

Special Situations (continued)

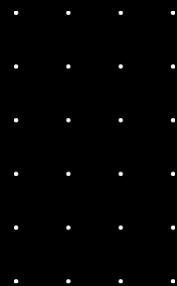
Certain transactions will require specific steps. Below is a list of the most common situations you may encounter:

- Referral Deals
 - When creating a **“Referred Out”** folder, you won’t have access to Forms and e-signature. Create a *miscellaneous* Seller folder that you can use to leverage e-signature
 - When creating a transaction that was referred to you, select **“Referred to me”** when creating the transaction in Business Tracker
 - You are required to upload required documents to the Compliance tab
 - You must request Commission in order to be paid
 - Internal referrals (with Compass agents) require Sales Managers approval
 - External referrals (with other brokerages) require Broker signature (use your Miscellaneous seller folder and send your request to **brokerfl@compass.com**)

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Q&A



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Next Steps:
Transaction Operations New
Agent Onboarding

Thursday (Biweekly) @ 10:30 a.m.
Find it on **Agent Calendar Florida**

COMPASS

agentexperience@compass.com

transactionsFL@compass.com

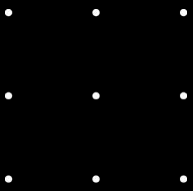
compass.com/feedback

compass-fla.com/businesstracker

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Thank you!

