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Buyer FLEX Task UC 1



shared by **Mike Schneider**

Use Automation

Start automation when any of these events occur



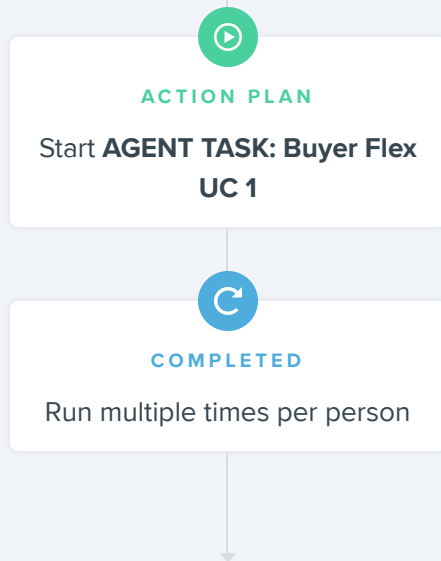
STAGE CHANGED

Under contract











CONDITIONS

- Client Type
- Buyer Attorney is not empty
- Buyer Close Date is not em...
- Buyer Attorney Phone is no...
- Buyer Contract Address is ...
- Buyer Binding Date is not e...
- Buyer Appraisal Cont Ends ...
- Buyer Finance Cont Ends is...
- Buyer D D Ends is not empty
- Buyer E M Amount is not e...
- Buyer Client Type



AGENT TASK: Buyer Flex UC 1 Action Plan

-  Add tag(s): **In due diligence**
-  Assign task **Deal Added to FUB Sync to Zillow** to the agent assigned to the contact
-  Assign task **Send executed PSA to Buyer/Seller Co-Opt Agent, Attorney, Lender** to the agent assigned to the contact
-  Assign task **Send Contract Docs and Flex Payment Form to office** to the agent assigned to the contact
-  Delay **1 day**
-  Assign task **EM Received** to the agent assigned to the contact
-  Delay **1 day**
-  Assign task **Proof of EM Deposit Sent to Co-op Agent** to the agent assigned to the contact

Use Automation

"Follow Up Boss is a big reason why we have been able to double our sales every year since 2015."



Preston Guyton

Broker/Owner, CRG Companies



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Buyer Flex Task UC 2 - 7 Days Before Close



shared by **Mike Schneider**

Use Automation

Start automation when any of these events occur



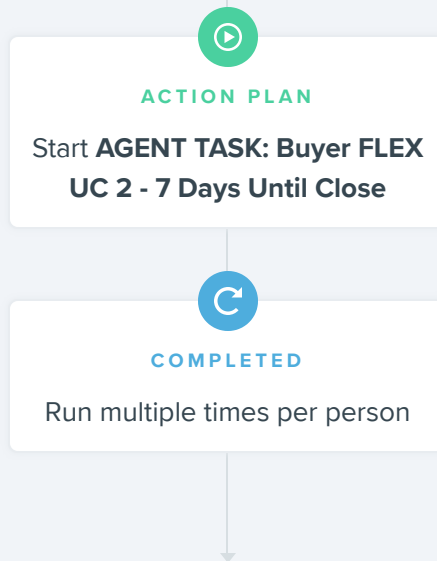
CALENDAR DATE

Buyer Close Date is in 7 da...



CONDITIONS

- Client Type
- Buyer Client Type
- Buyer Attorney is not empty
- Buyer Attorney Phone is no...
- Buyer Contract Address is ...
- Buyer Binding Date is not e...
- Buyer D D Ends is not empty
- Buyer E M Amount is not e...
- Buyer E M Due is not empty
- Buyer Finance Cont Ends is...
- Buyer Appraisal Cont Ends ...



AGENT TASK: Buyer FLEX UC 2 - 7 Days Until Close Action Plan



- Zillow: Atlanta Communities does not allow DAs at closing for Zillow Flex transactions. Agents only need to pick up earnest money if it exceeds the commission earned. If the agent attends the closing, take the Atlanta Communities check to the office, and they'll issue the agent's check immediately.

Notifications: **Assigned Agent**



Assign task **Closing Scheduled** to the agent assigned to the contact



Assign task **Convey Utilities information to client** to the agent assigned to the contact



Assign task **Walkthrough Scheduled** to the agent assigned to the contact



Assign task **Calendar Invite for Closing** to the agent assigned to the contact



Delay **2 days**



Assign task **Confirm Buyer Signed Lender CD** to the agent assigned to the contact



Delay **1 day**



- Remind %contact_name% to bring a photo ID and a blank check to closing in case there's a small balance to settle.
- Confirm %contact_name% attendance at close or arrange alternatives with closing attorney
- Send %contact_name% address for closing attorney

Notifications: **Assigned Agent**



Delay **1 day**



Assign task **Clear to Close Received?** to the agent assigned to the contact

Use Automation

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Buyer FLEX Task UC 3 - 3 Days Before Close



shared by **Mike Schneider**

Use Automation

Start automation when any of these events occur



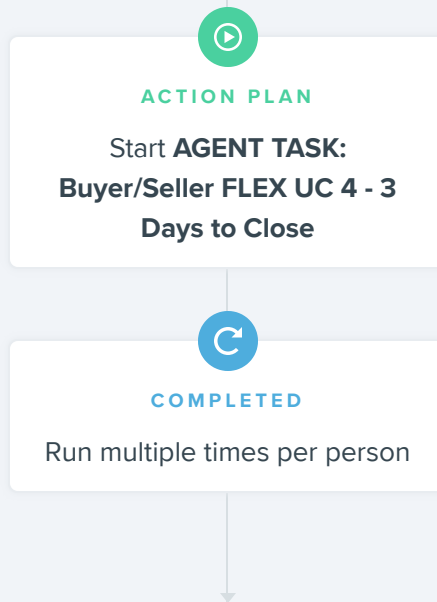
CALENDAR DATE

Buyer Close Date is in 3 da...



CONDITIONS

- Client Type
- Buyer Client Type
- Buyer Attorney is not empty
- Buyer Attorney Phone is no...
- Buyer Contract Address is ...
- Buyer Binding Date is not e...
- Buyer D D Ends is not empty
- Buyer E M Amount is not e...
- Buyer E M Due is not empty
- Buyer Finance Cont Ends is...
- Buyer Appraisal Cont Ends ...



AGENT TASK: Buyer/Seller FLEX UC 4 - 3 Days to Close Action Plan



Confirm the sales price, commission rate, and closing date. Ensure the Zillow Pay Form is accurate and reflects any updates. If the Pay Form is revised, please send the updated version to the office for proper processing.

Notifications: **Assigned Agent**



Delay 1 day



Assign task **Flex Transactions Details Correct** to the agent assigned to the contact

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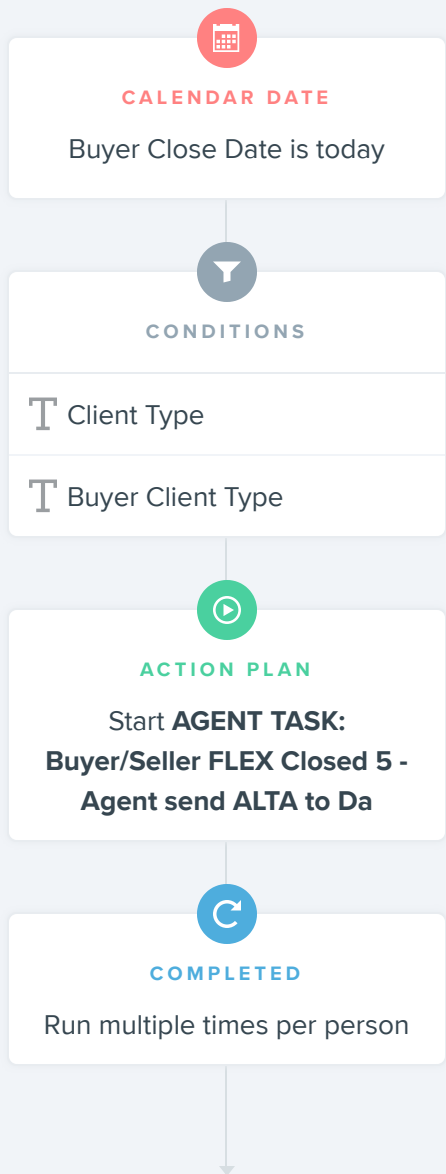
Buyer Flex Task UC 4 - Day of Closing



shared by **Mike Schneider**

Use Automation

Start automation when any of these events occur



AGENT TASK: Buyer/Seller FLEX Closed 5 - Agent send ALTA to Da Action Plan



Assign task **Send ALTA to Daniel** to the agent assigned to the contact



%agent_first_name%, Congratulations on closing %custom_contract_address%! Please update %contact_name%'s stage to "Closed" and send me a copy of the ALTA as soon as you can so I can finalize the transaction and ensure Zillow gets paid promptly. Don't forget to request a client review!

Thanks again, and let's get started on the next one! Thanks, Daniel
daniel@TopGaHomes.com

Notifications: **Assigned Agent**



Assign task **CONTACT STAGE Changed to Closed** to the agent assigned to the contact



Assign task **DEAL STAGE Changed to Closed** to the agent assigned to the contact

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