MyDeal Tracker & Reminder (MDTR) is a web and mobile app developed for the Real Estate industry to manage the purchase and sale transactions. It is a handy tool for the Real Estate Agents, Mortgage Brokers and Lawyers to manage the transaction's tasks including task reminder and alert notifications for tasks that are incomplete.

MDTR app will enable users/subscribers to setup all various steps involved in a typical real estate deal and set the program's notification/alert feature to notify the subscriber about the status of the task that is yet to be completed, e.g. home inspection, repairs that need to be carried out as part of condition of sale, closing date, etc. These features are useful to all professional parties to a real estate purchase and sale transaction because it will enable them to keep tabs on all the tasks through deal/appointment setup, reminders and alert notification setup.
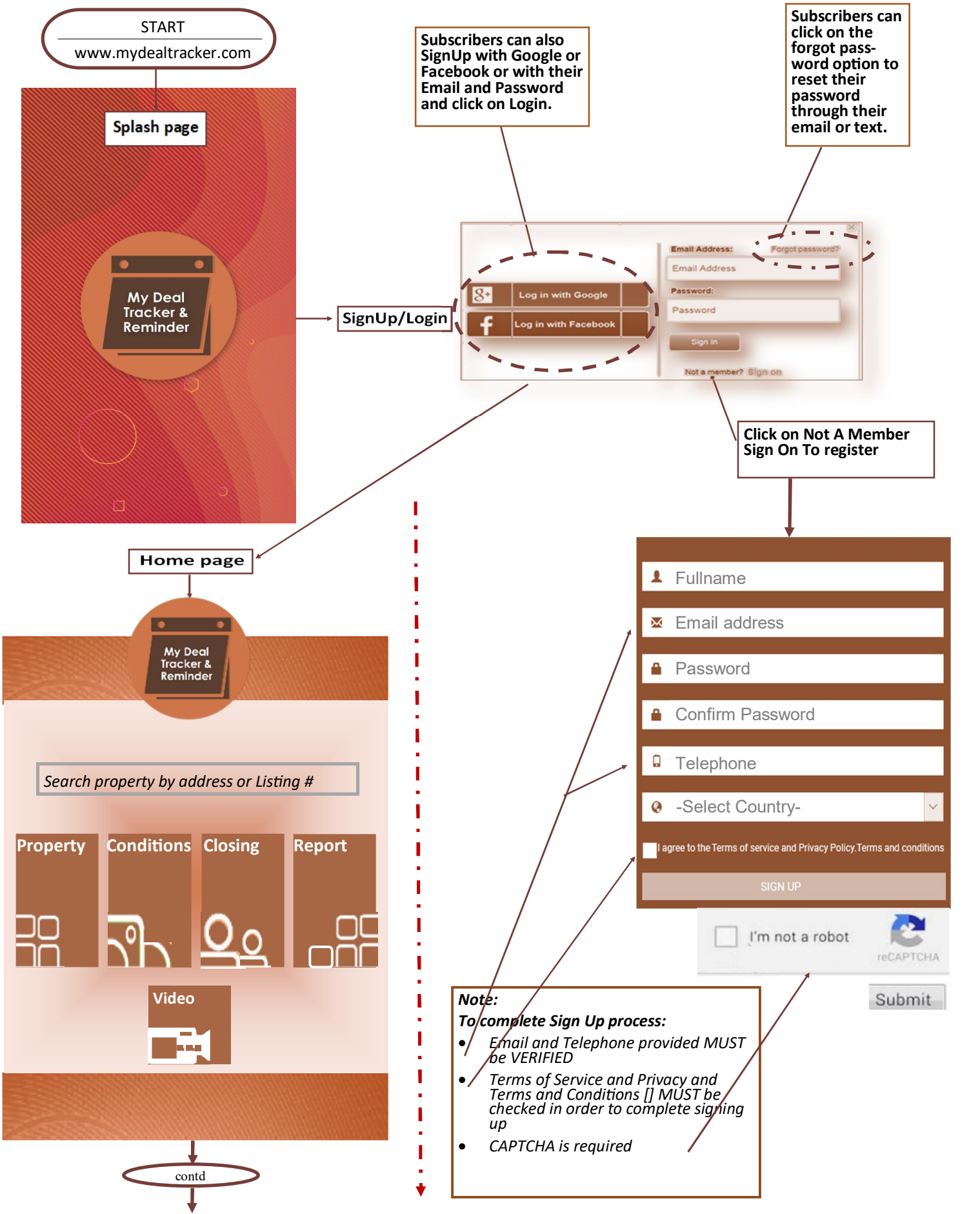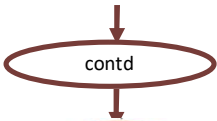
By Rotimi Osuntola

Every Subscriber is expected to register by entering his/her information, Name, email, phone number, broker of record, etc.

For the use of the App subscriber enters the information about: the property leasing/buying agent, seller/buyer, MLS or listing number, property address, image, closing date, date property is shown, offer, final offer acceptance date, inspection, required repairs, etc and set the due dates for various tasks with deadlines so alert notifcations can be sent as reminders.

There are two sets of alert notifications. While the first can be set for 1 month, or two weeks or one week, the second alert is designed to be lower than the first alert. This information is useful and will help in preventing the subscriber from missing the deadline for the tasks with deadlines thereby ensuring the successful closing of the deal.

The software will have features to upload the property image, MLS; and any other important document for electronic storage and future online reference.

The "alert" feature will send notifications to the subscriber through email and or phone number provided during the registration data setup.

For a consolidated report in PDF/hard copy of a subscriber's all clients buyers and sellers, report can be generated listing all clients/deals with deadline status, due dates, etc. The report can be saved on subscribers' personal computers and remotely in the iCloud.

START
www.mydealtracker.com

Splash page

Subscribers can also SignUp with Google or Facebook or with their Email and Password and click on Login.

Subscribers can click on the forgot password option to reset their password through their email or text.

My Deal Tracker & Reminder

SignUp/Login

Email Address: Forgot password?
Email Address
Password:
Password
Sign In
Not a member? Sign on

Log in with Google
Log in with Facebook

Click on Not A Member Sign On To register

Home page

My Deal Tracker & Reminder

Search property by address or Listing #

Property   Conditions   Closing   Report

Video

Fullname
Email address
Password
Confirm Password
Telephone
-Select Country-
I agree to the Terms of service and Privacy Policy.Terms and conditions
SIGN UP

I'm not a robot   reCAPTCHA

Submit

Note:
To complete Sign Up process:
- *Email and Telephone provided MUST be VERIFIED*
- *Terms of Service and Privacy and Terms and Conditions [] MUST be checked in order to complete signing up*
- *CAPTCHA is required*

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My Deal Tracker & Reminder

Search property by address or Listing #

Property   **Conditions**   **Closing**   **Report**

Video

Property address that has been entered using the **Listing Module** can be pulled up for the purposes of: **Make Offer** such as; **BuyerRep**, and **SellerRep**, Update **Conditions of Financing** such as: **Mortgage Status, Inspection, Appraisal, Repairs Status** and for **Closing Module** by the **Seller's Lawyer, Purchaser's Lawyer,** and **Closing Date**.

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***When the property is found, the sys will display: Item Nos. 3, 4, 4b,

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Property
- **Listing**
- **Interested Purchaser**
- **Showing**
- **Make Offer**
- **Update**

Property Module/Listing

1. **TransID: 00,000,000** (*auto gen* for Listing)   **1b. Today's Date:** mm/dd/yyyy
2. **PropertyDetails:**
3. **Listing #:** (15chars AN- **mls no. goes here)**   **4b. Listing Date:** mm/dd/yyyy
4. **Property Type:** 0 Commercial   0 Residential
5. **Prop Address: City/Town:** (15A chars)   **State:** (10 A char)   **Postal/Zip Code:** (6 chars AN)
6. -Top part (1-4) remains after Save & Continue button to the next Section -
7. **Status:** 0 Active 0 Offer-in place 0 Suspended 0 Sold
8. **Listing Type:** 0 Sale 0 Lease   **Listing Price:** (000,000,000)
9. **Major Intersection:** (25 An char)
10. **Major Nearest Town:** (25 An char)
11. **Occupancy:** 0 Owner-Occupied 0 Tenant-Occupied o Vacant
12. **Possession:** 0 Immediate 0 Other: _____ [Day(s)/Week(s)/Month(s)] (use dropdown)
13. ——————————-   **Exit**   **Next**
14. **Listing Source:**
15. **Seller(s):** Names (30 chars AN)
16. **Seller(s) Cellphone(s):** (VISIBLE ONLY TO THE LISTING AGENT - Nos to be made dialable from within the app) *FIELD CAN BE BLANK IF ENTRY IS BEING MADE BY A NON-LISTING AGENT WHO JUST WANT TO SET UP THE PROPERTY FOR THE PURPOSE OF TRACKING HIS/HER DEAL. A BUYER'S AGENT CAN ALSO COMPLETE LISTING IF THE LISTING AGENT IS NOT A SUBSCRIBER TO THE APP, BUT WON'T BE ABLE TO ENTER PHONE # HERE.*
17. **Update Notifications:** 0 Yes (**0** Text **0** Email) **0** No (*if they wish to receive notifications on their cell phone(s) for updates on the transactions*)
18. **Realtor**: (50chars (AN))
19. **List Branch:** (50 Chars (AN))
20. **Address:** (25, AN char)
21. **City/Town:** (15A chars)   **State:** (10 A char)   **Postal/Zip Code:** (6 chars AN)
22. **Listing Agent(s):** (*Auto pull name* associated with Signin (field to be editable so the Subscriber-agent interested in the property can complete the module just to be able to Track the Deal)(25 ANchars)   **Tel (W):** (11 N)   **Tel (C):** (*Auto pull cellphone* number associated with Signin(11 N)) (Nos to be made dialable from within the app)
23. **email:** (*Auto pull email* associated with Signin (35AN))
24. —end of property Listing action—>   **Save**   **Exit**

Alert Notifications upon completion to be sent to:
a. **Listing Agent**—Listing Confirmation of Listing by Text/Email
b. **Seller(s)** - Listing Confirmation of Listing by Text/Email (based on choice in (16)

Property Search by address or Listing #:

1. **TransID: 00,000,000** (*auto generated for freq of searches*)
2. **Listing #:** (15chars AN- **mls no. goes here)**   **Listing Date:** mm/dd/yyyy
3. **Property Type:** 0 Commercial   0 Residential
4. **Prop Address:**
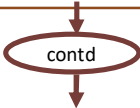5. **Status:** 0 Active 0 Offer-in place 0 Suspended   0 Sold

Click desired option   **Property**   **Conditions**   **Closing**   **Report** *> to go into the Module*

Property Module/Interested Purchaser *(MODULE VISIBLE ONLY TO BUYER'S AGENT)*

1. **TransID: 00,000,000** (*auto gen for IntBuyer*)   **1b. Today's Date:** mm/dd/yyyy
2. **PropertyDetails:**
3. **Listing #:** (15chars AN- **mls no. goes here)**   **4b. Listing Date:** mm/dd/yyyy
4. **Property Type:** 0 Commercial   0 Residential
5. **Prop Address: City/Town:** (15A chars)   **State:** (10 A char)   **Postal/Zip Code:** (6 chars AN)
6. **Status:** 0 Active 0 Offer-in place 0 Suspended   0 Sold
7. **Listing Type:** 0 Sale 0 Lease   **Listing Price:** (000,000,000)
8. **Major Intersection:** (25 An char)
9. **Major Nearest Town:** (25 An char)
10. **Possession:** 0 Immediate 0 Other: _____ [Day(s)/Week(s)/Month(s)] (use dropdown)
11. ——————————-   **Exit**   **Next**
12. **Int. Purchaser's Source:** 0 Existing Client 0 Walk-in/Ad   0 Referral *(indicate name, Tel: (for Thank you Notification purpose)*
13. **Int. Purchaser(s):** Names (30 chars AN)
14. **Cellphone(s):** (VISIBLE ONLY TO THE INT BUYER"S AGENT -Nos to be made dialable from within the app)
15. **Update Notifications:** 0 Yes (**0** Text **0** Email) **0** No (*if they wish to receive notifications on their cell phone(s) for updates on the transactions*)
16. **intPurchaser's Agent(s):** (*Auto pull name* associated with Signin (field to be editable so the Agent can complete the module manually (25 ANchars)) **Tel (W):** (11 N)   **Tel (C):** (*Auto pull cellphone* number associated with Signin(11 N))
17. **email:** (*Auto pull email* associated with Signin (35AN))
18. —end of property Listing action—>   **Save**   **Exit**

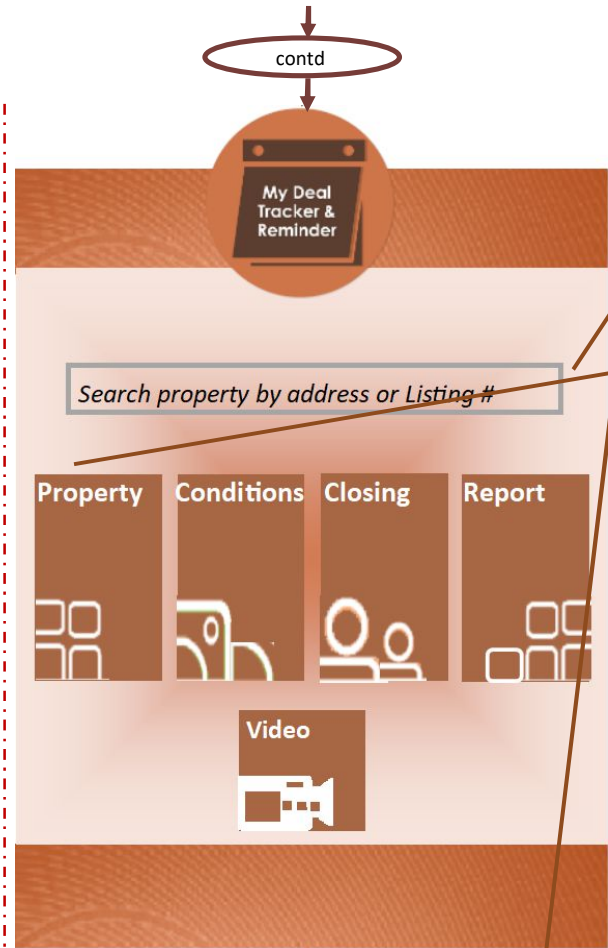**Alert Notifications upon completion to be sent to:**
a. **Referral**—Thank you Text to the person who referred the client by Text *(Insert Name of Agent and Cellphone - Line 18)*
b. **Int. Buyer(s)** - Text/Email (based on choice in (16) Thank you for choosing me as your Agent for your proposed property Puchase. A file has been created for this transaction and you will be regularly infomed as there are updates.

   (Insert Name of Agent and Cellphone - Line 16, and 17)

Property
- **Listing**
- **Intrested Purchaser**
- **Showing**
- **Make Offer**
- **Update**

My Deal Tracker & Reminder

Search property by address or Listing #

Property   **Conditions**   **Closing**   **Report**

Video

My Deal Tracker & Reminder

Search property by address or Listing #

Property **Conditions** **Closing** **Report**

Video

Search property by address or Listing #:

Property address that has been entered using the **Listing Module** can be pulled up for the purposes of: **Make Offer** such as; **BuyerRep**, and **SellerRep**, Update **Conditions of Financing** such as: **Mortgage Status, Inspection, Appraisal, Repairs Status** and for **Closing Module** by the **Seller's Lawyer**, **Purchaser's Lawyer,** and **Closing Date**.

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***When the property is found, the sys will display: Item Nos. 3, 4, 4b,

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Property
- Listing
- Intrested Purchaser
- *Showing*
- Make Offer
- Update

Property Module/Listing/Showing

1. **TransID: 00,000,000** (*auto gen for # of showings*)   **Today's Date:** mm/dd/yyyy
2. **PropertyDetails:**
3. **Listing #:** (15chars AN- **mls no. goes here**)   **Listing Date:** mm/dd/yyyy
4. **Listing Agent(s):** (*insert no. 22*)   **Tel (C):** (*insert no on line 22*)
5. **Prop Address: City/Town:** (15A chars)   **State:** (10 A char)   **Postal/Zip Code:** (6 chars AN)
6. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold
7. **Listing Type: 0** Sale **0** Lease   **Listing Price:** (000,000,000)
8. **Major Intersection:** (25 An char)
9. **Major Nearest Town:** (25 An char)
10. **Occupancy: 0** Owner-Occupied **0** Tenant-Occupied **o** Vacant
11. **Possession: 0** Immediate **0** Other: _____ [Day(s)/Week(s)/Month(s)] (use dropdown)
12. ————————-   [Exit] [Next]
13. **Showing Request:**
14. **Requesting Agent:** Names (30 chars AN)*Auto pull **name** associated with Signin*
15. **Tel (W):** (11 N)   **15b. Tel (C):** (*Auto pull **cellphone** number associated with Signin(11 N)*)
16. **email:** (*Auto pull **email** associated with Signin (*35AN))
17. **Requesting Agent Realtor:** (50chars (AN))
18. **Branch:** (50 Chars (AN))
19. **Message to Listing Agent:**

    Hello (insert Listing Agent's name),
    This is a Request to Show the Property below: *(pull info from 4 above)*
    Prop Address: City/Town: **State:**   **Postal/Zip Code:**
    Please confirm by Text or Email, the earliest time the Property can be shown.

    Thank you,
    (Insert no. 14)
    (Insert line no. 15b & 16)
    (insert line no. 17)

20. —end of property Listing action—>   [Save] [Exit]

Alert Notifications upon completion to be sent to:
a. **Listing Agent**—Requesing a Showing by Text/Email
b. **RequestingAgent** - Request to Show Property Confirmation by Text/Email (cc: email sent to Listing Agent, as notification to Requesting Agent)

Property Search by address or Listing #:

1. **TransID: 00,000,000** (*auto generated for freq of searches*)
2. **Listing #:** (15chars AN- **mls no. goes here**)   **Listing Date:** mm/dd/yyyy
3. **Property Type: 0** Commercial   **0** Residential
4. **Prop Address:** (*auto populate*)
5. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold

Click desired option > [Property] Conditions Closing Report *to go into the Module*

Property Module/Listing/Make Offer

1. **TransID: 00,000,000** (*auto gen for # of Make Offer*)   **Today's Date:** mm/dd/yyyy
2. **PropertyDetails:**
3. **Listing #:** (15chars AN- **mls no. goes here**)   **Listing Date:** mm/dd/yyyy
4. **Listing Agent(s):** (*insert no. 22 from Listing*)   **Tel (C):** (*insert no on line 22*)
5. **Prop Address: City/Town:** (15A chars)   **State:** (10 A char)   **Postal/Zip Code:** (6 chars AN)
6. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold
7. **Listing Type: 0** Sale **0** Lease   **Listing Price:** (000,000,000)
8. **Major Intersection:** (25 An char)
9. **Major Nearest Town:** (25 An char)
10. **Occupancy: 0** Owner-Occupied **0** Tenant-Occupied **o** Vacant
11. **Possession: 0** Immediate **0** Other: _____ [Day(s)/Week(s)/Month(s)] (use dropdown)
12. ————————-   [Exit] [Next]
13. **Offer Detail: 0** New Offer **0** Modified Offer **0** Manage Offers **0** Deposit with offer: 0,000,000
14. **Offer By: 0** Buyer's Agent **0** Listing Agent   **Amt. Offered:** 00,000,000
15. **Buyer's Name:** Names (30 chars AN)*Auto pull **name** from Int. Buyer dB as name being typed*
16. **Tel (C):** (*Auto pull **cellphone** number associated with name if it's already in db, else enter manually(11 N)*)
17. **email:** (*Auto pull **cellphone** number associated with name if it's already in db, else enter manually(35AN)*)

    Hello (insert Listing Agent's name),
    This is an advance Notification of an Offer due to be faxed/emailed soon, on the Property below: *(pull info from 4 above)*
    Prop Address: City/Town: **State:**   **Postal/Zip Code:**
    Please confirm by Text or Email, the receipt of Offer and when to expet a Siignback.

    Thank you,
    (Insert no. 14 from Showing Module)
    (Insert line no. 15b & 16 from Showing Module)
    (insert line no. 17 from Showing Module)

18. **Buyer's Agent Offer Notification:** (50chars (AN))
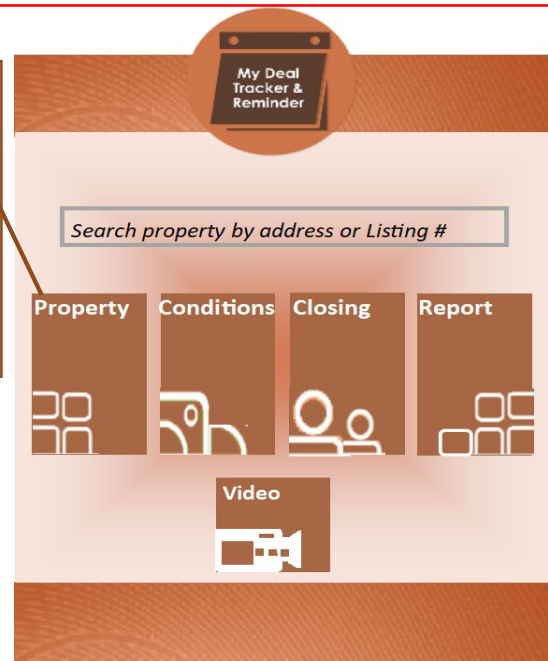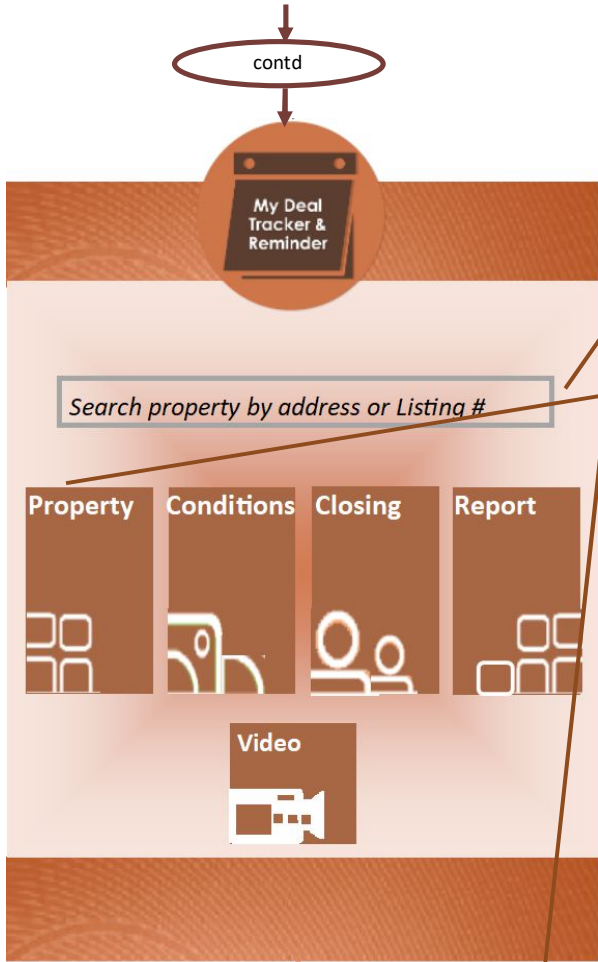19. —end of property Listing action—>   [Save] [Exit]

Alert Notifications upon completion to be sent to:
a. **Listing Agent**—Requesing a Showing by Text/Email **Buyer's Notification** - An Offer has been submitted as per your requested, and will be notified as soon as there is a response/update.

Manage Offers: (This is where all offers submitted are displayed for the Listing Agent).
Submitted by: Listing amount: 280,000   Closing Date: 3/20/2018

1. Name of Agent	Amount of offer	Diff (+/- LP)	Closing Date	
(autopull from Offer Module)	276,500	-3,500	4/20/18	+30days
(autopull from Offer Module)	280,000	0	4/10/18	+20days
(autopull from Offer Module)	282,500	+2,500	3/20/18	0

(if an offer with a higher than listing amount or another offer is received, Alert is generated and sent to all buyer's agents who have submitted lower offers, including proposed closing date for each offer.

Property
- Listing
- Intrested Purchaser
- Showing
- *Make Offer*
- **Update**

My Deal Tracker & Reminder

Search property by address or Listing #

Property **Conditions** **Closing** **Report**

Video

My Deal Tracker & Reminder

Search property by address or Listing #

Property | **Conditions** | **Closing** | **Report**

Video

Property address that has been entered using the **Listing Module** can be pulled up for the purposes of: **Make Offer** such as; **BuyerRep**, and **SellerRep**, Update **Conditions of Financing** such as: **Mortgage Status, Inspection, Appraisal, Repairs Status** and for **Closing Module** by the **Seller's Lawyer**, **Purchaser's Lawyer,** and **Closing Date**.

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***When the property is found, the sys will display: Item Nos. 3, 4, 4b,

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Property
- Listing
- Interested Buyer
- Showing
- Make Offer
- Update

Property Module/Listing/Update

1. **TransID: 00,000,000** (*auto gen for # of update*)   **Today's Date:** mm/dd/yyyy
2. **PropertyDetails:**
3. **Listing #:** (15chars AN- **mls no. goes here**)   **Listing Date:** mm/dd/yyyy
4. **Listing Agent(s):** (*insert no. 22*)   **Tel (C):** (*insert no on line 22*)
5. **Prop Address: City/Town:** (15A chars)   **State:** (10 A char)   **Postal/Zip Code:** (6 chars AN)
6. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold
7. **Listing Type: 0** Sale **0** Lease   **Listing Price:** (000,000,000)
8. **Major Intersection:** (25 An char)
9. **Major Nearest Town:** (25 An char)
10. **Occupancy: 0** Owner-Occupied **0** Tenant-Occupied **o** Vacant
11. **Possession: 0** Immediate **0** Other: _____ [Day(s)/Week(s)/Month(s)] (*use dropdown*)
12. ————————-   [Exit] [Next]
13. **Update Detail: 0** Price Drop   **0** Offer Modification (*if selected, substitute for Price Drop label*)
14. **New Amount: 00,000,000**
15. **Any other info: (100 AN Chars)**
16. **Message to All Agents who have shown the Property/submitted Offers:**

> ****ALERT NOTIFICATION ON PRICE CHANGE ON PROPERTY AT****
>
> **Prop Address: City/Town: State: Postal/Zip Code:**
>
> Please check the respective property MLS for the current price.
>
> Thank you,
> (Insert no. 4 as shown above)
> (Insert line no. 4 Tel(c))

17.   —end of property **Update** action—>   [Save] [Exit]

Alert Notifications upon completion to be sent to:

a. **Seller by Listing Agent** —As per your approval, your property's price has been changed to reflect new price.

b. **Buyer's Agent to Int. Buyers** - This is an Alert Notification of a Price Change on the property you have viewed at: **Prop Address: City/Town: State: Postal/Zip Code:**

Please contact me immediately if you are interested in submitting a new offer.

Thank you,
(Buyer's Agent name)
(IBuyer's Agent Tel/email)

Property Search by address or Listing

1. **TransID: 00,000,000** (*auto generated for freq of searches*)
2. **Listing #:** (15chars AN- **mls no. goes here**)   **Listing Date:** mm/dd/yyyy
3. **Property Type: 0** Commercial   **0** Residential
4. **Prop Address:**
5. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold

Click desired option > [Property] [Conditions] [Closing] [Report] *to go into the Module*

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1. **Listing #:** (15chars AN- **mls no. goes here**)   **Listing Date:** mm/dd/yyyy
2. **Property Type: 0** Commercial   **0** Residential
3. **Prop Address:**
4. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold

Click on any of these for desired action   [Financing] [Inspection] [Appraisal] [Repairs] [Exit]

————————**Conditions/**   **Financing** ————————

Status for:

a. **Mortgage Obtained: 0** Yes **([ ]** Pre-Approval [ ] Approval) **0** No
b. **Waive Financing: 0** Yes - mm/dd/yyy **0** No [**0** House to Sell **0** Other]
c. (Explain: 100 words Memo Field)
d. (*If Yes, 1. Buyer's Agent sends Notification of CoF Waiver to Listing Agent, indicating option selected under Yes. 2. Buyer's agent sends Ntification to Buyer advising ot the Waiver sent to the Seller's Agent. 3. In order for the Listing/Seller's Agent to notify Seller, he/she must sign into this same module after receiving Notification Text/Email, to complete f,g, h, below.*)
e. **Memo** (100 words AN)
f. ————-**Waiver Notification Acknowledgement** ———(*d and f are greyed out if module is opened by Buyer's agent, and the top part is greyed out if module is opened by the Listing/Seller's agent*)
g. CoF Hardcopy Received: **0** Yes (*send notification to Seller and acknowledgement to Buyer's Agent*)   **0** No (*send notification to Buyer's Agent of non-receipt of CoF hardcopy*)
h. **Memo** (100 words AN)
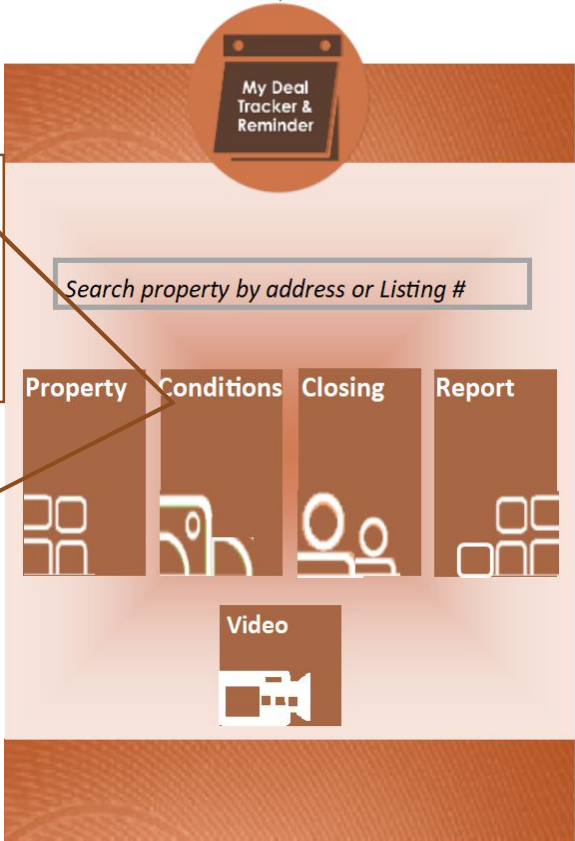i. *Common Options >> Click on any of these for desired action >>*   [Save] [Exit]

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1. **Listing #:** (15chars AN- **mls no. goes here**)   **Listing Date:** mm/dd/yyyy
2. **Property Type: 0** Commercial   **0** Residential
3. **Prop Address:**
4. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold

Click on any of these for desired action >>   [Financing] [Inspection] [Appraisal] [Repairs] [Exit]

————————**Conditions/Inspection** ————————

Status for:

a. **Inspection:**
b. **0** Required - **Date Ordered:** mm/dd//yyyy **Expected Delivery Date:** mm/dd/yyyy **0** Declined/Waived
c. **Date Received:** mm/dd/yyyy **c2: Repair(s) Needed: 0** No (Buyer's Agent notifies Listing Agent of Inspection Acceptance, and Listing Agent signs into account **0** Yes (provide list using add button) *The list will autopost to Repairs Module for compltn status, e.g*

Item	Condition	Rpair recommendation
Foundation	Cracks noted	N/A
Sewer Cap	Missing	To be replaced

g. NB: In most cases, it's the Buyer or Buyer's Agent who requests for Inspection (*Send Notifications to Listing Agent and Buyer(s)*)
h. **Walk-throughs**: **0** 1st Visit (mm/dd/yyyy) **0** 2nd Visit (mm/dd/yyy)
i. **Memo** (100 words AN)
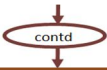
Click on any of these for desired action >>   [Save] [Exit]

My Deal Tracker & Reminder

Conditions
- Financing
- Inspection
- Appraisal
- Repairs

Search property by address or Listing #

Property | **Conditions** | **Closing** | **Report**

Video

(contd)

Conditions Module/<mark>MortgageBroker</mark> *(MODULE VISIBLE ONLY TO Purchaser's Mortgage Broker)*

1. **TransID: 00,000,000** (*auto gen for IntBuyer*)   **1b. Today's Date:** mm/dd/yyyy

2. **PropertyDetails:**

3. **Listing #:** (15chars AN- **mls no. goes here**)   **4b. Listing Date:** mm/dd/yyyy

4. **Property Type:**   **0** Commercial   **0** Residential

5. **Prop Address: City/Town:** (15A chars)   **State:** (10 A char)   **Postal/Zip Code:** (6 chars AN)

6. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold

7. **Listing Type:**   **0** Sale **0** Lease   **Listing Price:** (000,000,000)

8. **Major Intersection:** (25 An char)

9. **Major Nearest Town:** (25 An char)

10. **Possession: 0** Immediate **0** Other: _____ [Day(s)/Week(s)/Month(s)] (use dropdown)

11. ———————————————————->

12. **Conditions Module/**<mark>MortgageBroker</mark>

13. **Referral Source: 0 Existing Client   0 Bank   0 Agent** *(indicate name, Tel: (for Thank you Notification purpose)*

14. **Purchaser(s):** Names (30 chars AN) (auto pull from OfferModule)

15. **Current Address: City/Town:** (15A chars)   **State:** (10 A char)   **Postal/Zip Code:** (6 chars AN)

16. **New Address:** (auto pull from 5 above)

18. **Cellphone(s)**: (VISIBLE ONLY TO THE SELLER'S AGENT & Mortgage Broker -Nos to be made dialable from within the app)

19. **Update Notifications: 0** Yes (**0** Text   **0** Email)   **0** No (*if they wish to receive notifications on their cell phone(s) for updates on the transactions*)

20. **Purhcaser's Agent(s):** (*Auto pull **name** associated with Signin* (field to be editable so the Agent can complete the module manually (25 ANchars))   **Tel (W):** (11 N)   **Tel (C):** (*Auto pull **cellphone** number associated with Signin*(11 N))

21. **email:** (*Auto pull **email** associated with Signin (*35AN))

22. ————————————————————>

Alert Notifications upon completion to be sent to:

Referral—Thank you Text to the person who referred the client by Text *(Insert Name of Agent and Cellphone - Line 18)*

a. **Client(s)** - Text/Email (based on choice in (17) Thank you for choosing me as your Mortgage Broker for your property purchase. A file has been created for this transaction and you will be regularly infomed as there are updates. *(Insert Name of Agent and Cellphone - Line 16, and 17)*

Mortgage Task Document Checklist: | create ToDo List Pop-out for Comment

Tasks	Status	Comment	Notify
23. Mortgage App	In/complete	*(List omitted items)*	*none*
24. Credit Bureau	In/complete	*(List defaults if any*	*none*
		& pymt to imprv rating)	*none*
25. Purch/Sale Agr	recvd/awaitd	(list anyomitted items)	Agent/Client
26. Loan app submsn	yes/no	(list comment)	Client
27. Apprvl Doc List	in/complete	(list of docs for the bank)	Client
28. Docs signing	in/complete	list all/ommited /awaited task	

   a. Mortgage Approval
   b. Statement of Mortgage
   c. Letter of Direction
   d. Other docs (client risk profile)
   e. Waivers (if any)
   f. Closing Lawyer information/
   g. Financing Conditions debts reduction required payment receipts
   h. etc

29. Docs submsn   in/complete   (list o/stndg or secndry
   to the bank   doc req from d bank)

30. Docs fax to the
   lawyer   in/complete   (list o/standing)

30. Instrctn recvd by lawyr **0 yes 0 No** (deal set to close) notify cx deal set to close

31. Closing process completed: **0 Yes   0n No** (list o/standing tasks)

32. Closing date extension Requested by: **0 Seller (why?)   0 Buyer (why?)**

33. Amendment required? **0 Yes   0 No**

Conditions

- **Financing**

  - <mark>Mortgage Brokaer</mark>

- **Inspection**

- **Appraisal**

- **Repairs**

My Deal Tracker & Reminder

Search property by address or Listing #

Property   **Conditions**   **Closing**   **Report**

Video

1. **Listing #:** (15chars AN- *mls no. goes here*)   **Listing Date:** mm/dd/yyyy

2. **Property Type:** **0** Commercial   **0** Residential

3. **Prop Address:**

4. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold

Click desired option > to go into the Module ————————

Conditions/Appraisal —————

| Financing | Inspection | Appraisal | Repairs | Exit |

Status for:

a. **Appraisal:**

b. **0 Required - Date Ordered:** mm/dd//yyyy **Expected Delivery Date:** mm/dd/yyyy **0 Declined/Waived**

c. **Date Received:** mm/dd/yyyy **c2: Repair(s) Needed: 0** No (Buyer's Agent notifies Listing Agent of Appraisal Report either as okay or containing defects noticed and the repairs required, and Listing Agent signs into account **0** Yes (provide list using add button) >> The list will autopost to Repairs Module for compltn status

d. NB: In most cases, it's the Buyer or Buyer's Agent who requests for IAppraisal (Send Notifications to Listing Agent and Buyer(s))

e. **Memo** (100 words AN)

Common Options >> Click on any of these for desired action >> | Save | Exit |

Conditions
- **Financing**
- **Inspection**
- **Appraisal**
- **Repairs**

My Deal Tracker & Reminder

Search property by address or Listing #

| Property | Conditions | Closing | Report |

Video

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1. **Listing #:** (15chars AN- *mls no. goes here*)   **Listing Date:** mm/dd/yyyy

2. **Property Type:** **0** Commercial   **0** Residential

3. **Prop Address:**

4. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold

Click on any of these for desired action >> | Financing | Inspection | Appraisal | Repairs | Exit |

————————Conditions/Repairs—————————

Status for:

a. **Repairs:**

b. **0 Required - Date Ordered:** mm/dd//yyyy **Expected Delivery Date:** mm/dd/yyyy **0 Declined/Waived**

c. **Date Received:** mm/dd/yyyy **c2: Repair(s) Needed: 0** No (Buyer's Agent notifies Listing Agent of Inspection Acceptance, and Listing Agent signs into account **0** Yes (provide list using add button) The list will autopost to Repairs Module for compltn status, e. g.

d.	*Item*	*Recommended Repair*	*Status*
e.	Foundation	No repair recommended	N/A.
f.	Sewer Cap	to be replaced	Item Replaced.

g. NB: In most cases, it's the Buyer or Buyer's Agent who requests for Inspection (Send Notifications to Listing Agent and Buyer(s))

h. **Memo** (100 words AN)

Click on any of these for desired action >> | Save | Exit |

Conditions
- **Financing**
- **Inspection**
- **Appraisal**
- **Repairs**

My Deal Tracker & Reminder

Search property by address or Listing #

| Property | Conditions | Closing | Report |

Video

Closing Module/Lawyer/Purchaser's *(MODULE VISIBLE ONLY TO Purchaser's Lawyer)*

1. **TransID: 00,000,000** (*auto gen for IntBuyer*) **1b. Today's Date:** mm/dd/yyyy

2. **PropertyDetails:**

3. **Listing #:** (15chars AN- **mls no. goes here**) **4b. Listing Date:** mm/dd/yyyy

4. **Property Type:** **0** Commercial   **0** Residential

5. **Prop Address: City/Town:** (15A chars) **State:** (10 A char) **Postal/Zip Code:** (6 chars AN)

6. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold

7. **Listing Type: 0** Sale **0** Lease **Listing Price:** (000,000,000)

8. **Major Intersection:** (25 An char)

9. **Major Nearest Town:** (25 An char)

10. **Possession: 0** Immediate **0** Other: _____ [Day(s)/Week(s)/Month(s)] (use dropdown)

11. ————————————————-> | Exit | Next |

12. **Closing Module/Lawyer/Purchaser's**

13. **Referral Source: 0 Existing Client 0 Bank 0 Agent** *(indicate name, Tel: (for Thank you Notification purpose)*

14. **Purchaser(s):** Names (30 chars AN) (auto pull from OfferModule)

15. **Current Address: City/Town:** (15A chars) **State:** (10 A char) **Postal/Zip Code:** (6 chars AN)

16. **New Address:** (auto pull from 5 above)

17. **Cellphone(s):** (VISIBLE ONLY TO THE PURCHASER'S AGENT & LWAYER -Nos to be made dialable from within the app)

18. **Update Notifications: 0** Yes (**0** Text **0** Email) **0** No (*if they wish to receive notifications on their cell phone(s) for updates on the transactions*)

19. **Purchaser's Agent(s):** (*Auto pull name associated with Signin* (field to be editable so the Agent can complete the module manually (25 ANchars)) **Tel (W):** (11 N) **Tel (C):** (*Auto pull cellphone number associated with Signin*(11 N))

20. **email:** (*Auto pull email associated with Signin (*35AN))

21. ————————————————> | Save | Exit |

Alert Notifications upon completion to be sent to:

Referral—Thank you Text to the person who referred the client by Text *(Insert Name of Agent and Cellphone - Line 18)*

a. **Purchaser(s)** - Text/Email (based on choice in (17) Thank you for choosing me as your Lawyer for your property purchase closing. A file has been created for this transaction and you will be regularly infomed as there are updates. *(Insert Name of Agent and Cellphone - Line 16, and 17)*

Closing
- **Lawyer**
- **Purchaser's**
- **Seller's Mortgage Broker**
- **Purcharser's**

Pre-Closing Document Checklist:

	Tasks	Status	Comment	Notify
22.	Title Search	In/complete	*(List encumberances if any) (easement etc)*	Purchaser/ Purchaser's Agent
23.	Status Cert (if condo)	-ditto-	(list finc'l condtions)	purchasr
24.	Requisition ltr	in/complete	send to the other lawyer	none
25.	Stat of Adj.	in/complete	notify cx about funds to bring	purchser
26.	Stat prprty tax-city	in/complete	(disclose o/standing)	Agent/Purch
27.	Confirm closing	in/complete	awaiting funding/cx's chk	purchasr/agnt
28.	Doc signing	in/complete	appt set for x.xxvam/pm	purchasr
29.	Pymt dispatched	in/complete	to tax offc/sellr bank etc	agent
30.	Discharge Cert exis mtg	-ditto-	confirm prev mtg is dischrgd	Seller's lawyr
31.	PrprtySearch // Disbursement			

ADD BUTTON for more Tasks if needed

———————— | Save | Exit |

32. Closing process completed: **0** Yes **0**n No (list o/standing tasks)

33. Closing date extension Requested by: **0** Seller (why?)   **0** Buyer (why?)

34. Amendment required? **0 Yes 0 No**

35. Mortg Doc Registered: **0 Completed** *(notify purchaser the Mortgage doc has been registered and in the mail, and thank the client for the business)* **0 Incomplete**

36. ————————————————-> | Save | Exit |

Closing Module/Lawyer/Seller's *(MODULE VISIBLE ONLY TO Seller's Lawyer)*

1. **TransID: 00,000,000** *(auto gen for IntBuyer)* **1b. Today's Date:** mm/dd/yyyy
2. **PropertyDetails:**
3. **Listing #:** (15chars AN- **mls no. goes here**) **4b. Listing Date:** mm/dd/yyyy
4. **Property Type: 0** Commercial **0** Residential
5. **Prop Address: City/Town:** (15A chars) **State:** (10 A char) **Postal/Zip Code:** (6 chars AN)
6. **Status: 0** Active **0** Offer-in place **0** Suspended **0** Sold
7. **Listing Type: 0** Sale **0** Lease **Listing Price:** (000,000,000)
8. **Major Intersection:** (25 An char)
9. **Major Nearest Town:** (25 An char)
10. **Possession: 0** Immediate **0** Other: _____ [Day(s)/Week(s)/Month(s)] (use dropdown)
11. —————————————————-> [Exit] [Next]
12. ## Closing Module/Lawyer/Seller's
13. **Referral Source: 0 Existing Client 0 Bank 0 Agent** *(indicate name, Tel: (for Thank you Notification purpose)*
14. **Seller(s):** Names (30 chars AN) (auto pull from OfferModule)
15. **Current Address: City/Town:** (15A chars) **State:** (10 A char) **Postal/Zip Code:** (6 chars AN)
16. **New Address:** (auto pull from 5 above)
17. **Cellphone(s):** (VISIBLE ONLY TO THE SELLER'S AGENT & LWAYER -Nos to be made dialable from within the app)
18. **Update Notifications: 0** Yes (**0** Text **0** Email) **0** No (*if they wish to receive notifications on their cell phone(s) for updates on the transactions*)
19. **Seller's Agent(s):** (*Auto pull **name** associated with Signin* (field to be editable so the Agent can complete the module manually (25 ANchars)) **Tel (W):** (11 N) **Tel (C):** (*Auto pull **cellphone** number associated with Signin*(11 N))
20. **email:** (*Auto pull **email** associated with Signin* (35AN))
21. —————————————————> [Save] [Exit]

Alert Notifications upon completion to be sent to:

Referral—Thank you Text to the person who referred the client by Text *(Insert Name of Agent and Cellphone - Line 18)*

a. **Seller(s)** - Text/Email (based on choice in (17) Thank you for choosing me as your Lawyer for your property Sale closing. A file has been created for this transaction and you will be regularly infomed as there are updates. *(Insert Name of Agent and Cellphone - Line 16, and 17)*

Pre-Closing Document Checklist:

	Tasks	Status	Comment	Notify
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23.	Status Cert (if condo)	-ditto-	(list finc'l condtions)	purchasr
24.	Requisition ltr	in/complete	send to the other lawyer	none
25.	Stat of Adj.	in/complete	notify cx about funds to bring	purchser
26.	Stat prprty tax-city	in/complete	(disclose o/standing)	Agent/Purch
27.	Confirm closing	in/complete	awaiting funding/cx's chk	purchasr/agnt
28.	Doc signing	in/complete	appt set for x.xxvam/pm	purchasr
29.	Pymt dispatched	in/complete	to tax offc/sellr bank etc	agent
30.	Discharge Cert exis mtg	-ditto-	confirm prev mtg is dischrgd	Seller's lawyr

ADD BUTTON for more Tasks if needed

————————————————————>> [Save] [Exit]

31. Closing process completed: **0** Yes **0n** No (list o/standing tasks)
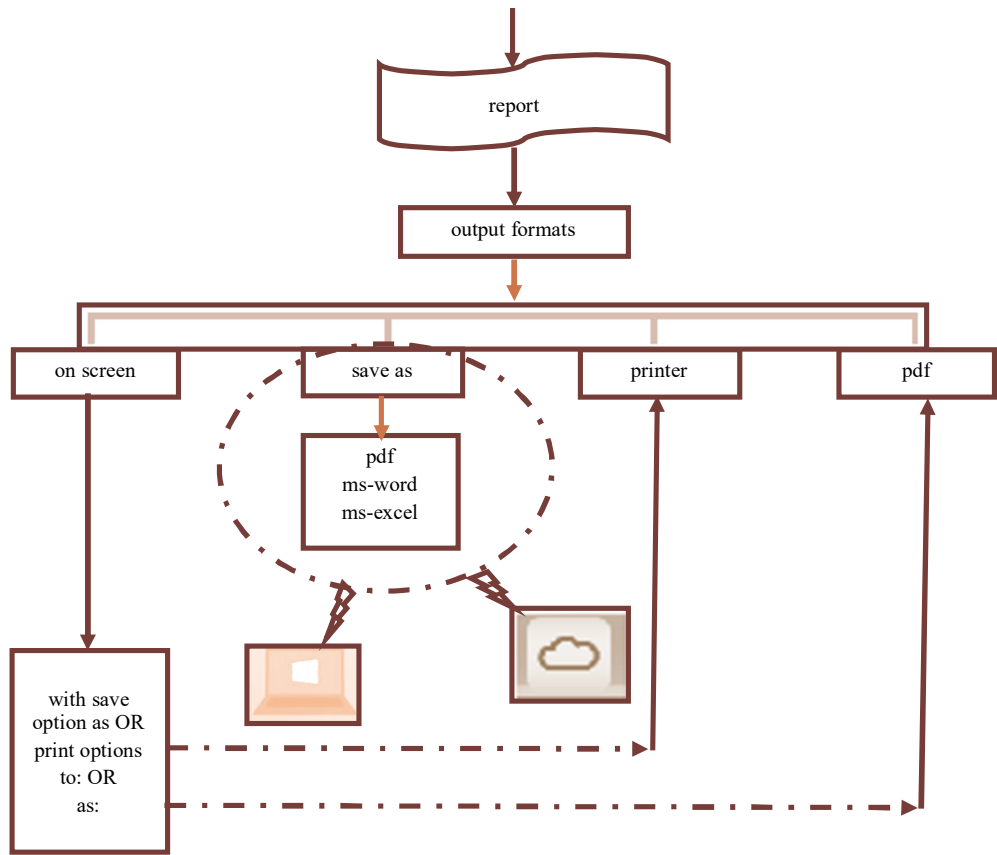32. Closing date extension Requested by: **0** Seller (why?) **0** Buyer (why?)
33. Amendment required? **0 Yes 0 No**
34. ——-—————————————————>> [Save] [Exit]

Property **Conditions** **Closing** **Report**

Video

[update]

[edit (add/update)] [delete]

Flowchart

report

↓

output formats

↓

| on screen | save as | printer | pdf |

save as → pdf / ms-word / ms-excel

on screen → with save option as OR print options to: OR as:

Required Reports/Analysis

i/n	report types	for company	listing agent	Buyer'sagent	lawyer	mtg broker
1	Subscribers	global total				
2	Subscribers per type	breakdown	total #	total #	total #	total #
3	Properties	global total				
4	Properties per type per	breakdown	listed	purchased	closed	financed
5	Properties values	global total				
6	Properties values type per	breakdown	listed	purchased	closed	financed
7	Subscribers per country per	breakdown/country	total #	total #	total #	total #
8	Properties per country per	breakdown/country	listed	purchased	closed	financed
9	Properties values per country	breakdown/country	listed	purchased	closed	financed
10	Properties-total residential	global total	listed	purchased	closed	financed
11	Properties-residential values per	global n /country brkdn	listed	purchased	closed	financed
12	Properties-total commercial	global total	listed	purchased	closed	financed
13	Properties-commercvial valus per	global n /country brkdn	listed	purchased	closed	financed
14	Property listing-seller referrals	global total	total #		total #	
15	Property purchase-buyer referrals	global total		total #	total #	total #
16	Property listing-seller referrals	breakdown/country	listed		closed	
17	Property purchase-buyer referrals	breakdown/country		purchased	closed	financed
18	Properties Showing	breakdown/country	total #	total #		
19	Property sold by Listing agents	breakdown/country	total #		total #	
20	Property value sold by Listing agent	breakdown/country	total #		total #	