

## **Cleveland P/S User Documentation**

### **Process overview:**

The goal of this process is to generate the purchase and sale agreement, the mortgage, and the promissory note for a seller financed transaction in Cleveland, OH. The process has two component parts:

- (1) Google form to collect the necessary information for those three documents
- (2) Community lawyer based automation to generate the purchase and sale agreement for signatures

### **User persona:**

This system is built for the buyer to more easily facilitate the transaction with the seller. The buyer would work with the seller to fill out the required fields in the Google Form that will populate the community lawyer generated purchase and sale agreement for digital signature to be sent to the title company.

#### (1) [Google Form](#)

- (a) Buyer
- (b) Seller
- (c) Address
- (d) Parcel
- (e) Purchase Price
- (f) Earnest money
- (g) Remaining (calculated attribute in google sheet)

#### (2) [Generate Purchase and Sale Agreement](#)

- (a) The key is the property address which will populate the Purchase and Sale Agreement

### Considerations for future use:

1. The calculated field in the Google Doc only goes to row 100. This will need to be automated or expanded when those rows are used.
2. Decided not to automatically email to the seller to ensure time to review
3. Can look to build customer portal for buyer access
4. Expand to include mortgage deed, promissory note (for seller financing transactions).

### Simple Flow Chart of Current Process

