Administrative Settings

Workflow   >
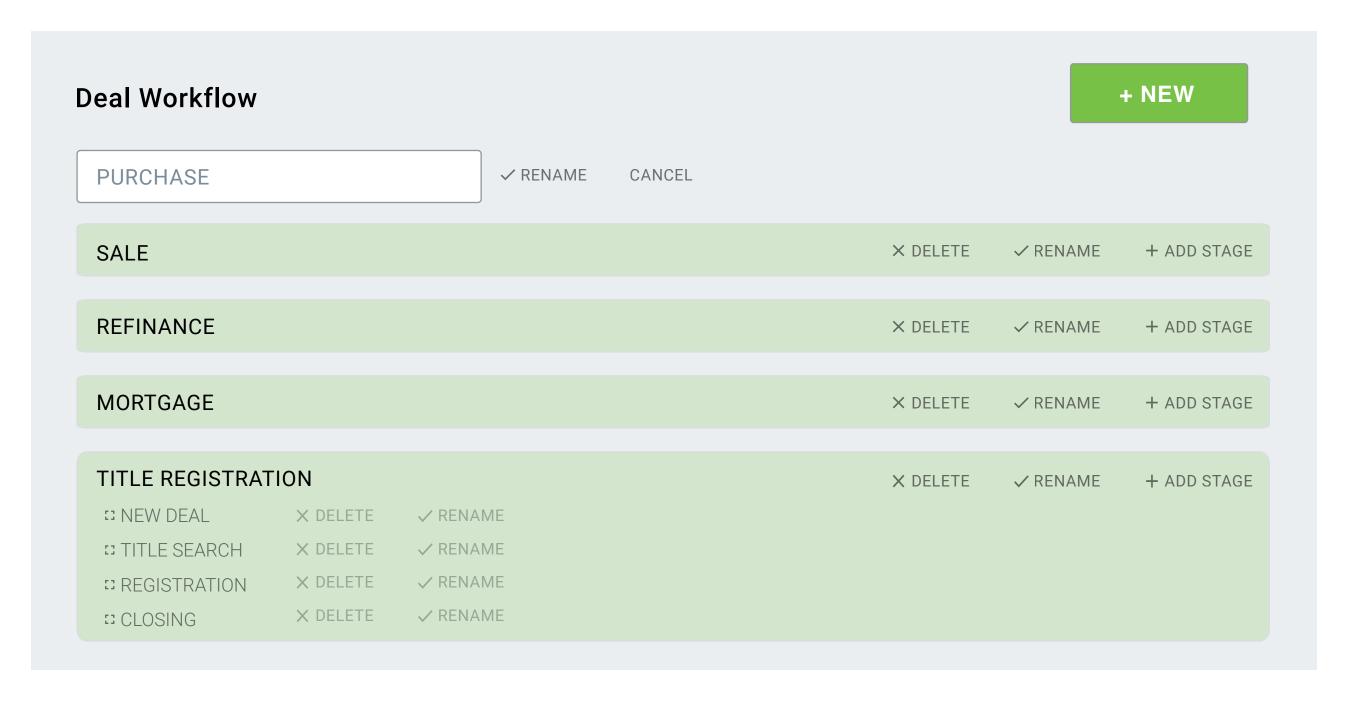
Checklist Items   >

Roles   >

Documents   >

Email Settings   >

Email Templates   >

Deal Workflow

+ NEW

PURCHASE	✓ RENAME CANCEL

SALE	✕ DELETE	✓ RENAME	+ ADD STAGE

REFINANCE	✕ DELETE	✓ RENAME	+ ADD STAGE

MORTGAGE	✕ DELETE	✓ RENAME	+ ADD STAGE

TITLE REGISTRATION   ✕ DELETE   ✓ RENAME   + ADD STAGE

⸬ NEW DEAL   ✕ DELETE   ✓ RENAME

⸬ TITLE SEARCH   ✕ DELETE   ✓ RENAME

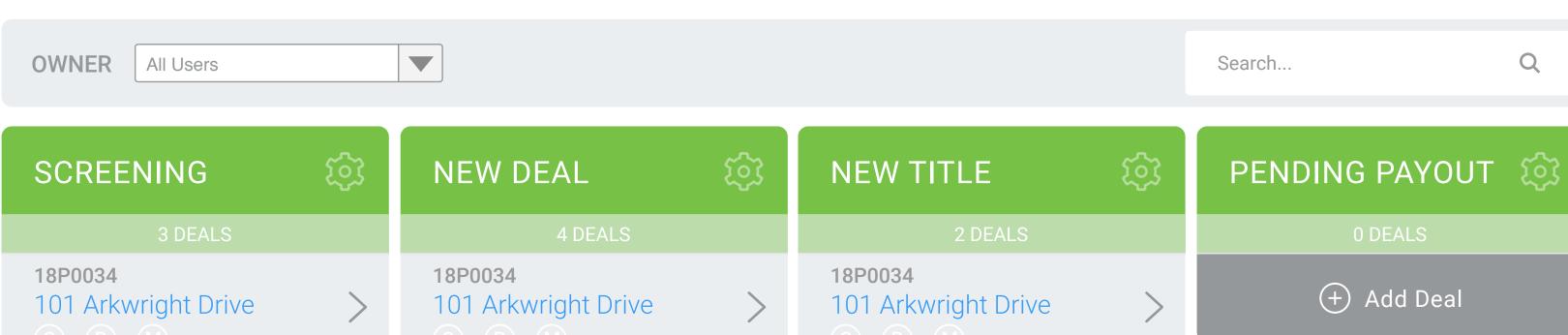⸬ REGISTRATION   ✕ DELETE   ✓ RENAME

⸬ CLOSING   ✕ DELETE   ✓ RENAME

PURCHASE   SALE   MORTGAGE   TITLE TRANSFER   **+ NEW**

OWNER   All Users ▼   Search... 🔍

SCREENING ⚙	NEW DEAL ⚙	NEW TITLE ⚙	PENDING PAYOUT ⚙
3 DEALS	4 DEALS	2 DEALS	0 DEALS

SCREENING

18P0034
101 Arkwright Drive ›
Ⓒ Ⓡ Ⓜ

18P0037
15 Commuter Drive ›
Ⓒ Ⓡ Ⓜ

18P0043
45 Locomotive Crescent ›
Ⓒ Ⓡ Ⓜ

⊕ Add Deal

NEW DEAL

18P0034
101 Arkwright Drive ›
Ⓒ Ⓡ Ⓜ

18P0037
15 Commuter Drive ›
Ⓒ Ⓡ Ⓜ

18P0043
45 Locomotive Crescent ›
Ⓒ Ⓡ Ⓜ

18P0043
45 Locomotive Crescent ›
Ⓒ Ⓡ Ⓜ

NEW TITLE

18P0034
101 Arkwright Drive ›
Ⓒ Ⓡ Ⓜ

18P0037
15 Commuter Drive ›
Ⓒ Ⓡ Ⓜ

⊕ Add Deal

PENDING PAYOUT

⊕ Add Deal

BACK

15 Commuter Drive
18P0047

+ NEW

OWNER | All Users ▼ |

Search... 🔍

stage
SCREENING ⚙

3 DEALS

18P0034 - screening 2/6
101 Arkwright Drive ›
Ⓒ Ⓡ Ⓜ

18P0037
15 Commuter Drive ›
Ⓒ Ⓡ Ⓜ

18P0043
45 Locomotive Crescent ›
Ⓒ Ⓡ Ⓜ

⊕ Add Deal

18P0034 - 101 Arkwright Drive
Closing Date: September 29, 2016

Client(s)   Realtor   Mortgage Agent   Cooperating Law Firm   ⌄

📋 Checklist   📄 Documents   ▥ ≣

☐ Checkbox Off

☑ Checkbox On

☐ Checkbox Disabled

☐ Checkbox Off

☑ Checkbox On

☐ Checkbox Disabled

☐ Checkbox Off

Recent Activities

| All Activities ▼ |

Deal Updated
APS document added
Ⓡ Sri Lankes
Sep 14, 2016 at 12:30

Deal Updated
Changed Stage to *Title Search*
Ⓡ Abi Singam
Sep 13, 2016 at 15:25

Note Added
"Client is annoyed that Mortgage
agent is unreachable"
Ⓡ Abi Singam
Sep 13, 2016 at 15:25

Note Added
"Need to update client by tomorrow

BACK

15 Commuter Drive
18P0047

+ NEW

OWNER   All Users ▼

Client(s)   Realtor   Mortgage Agent   Cooperating Law Firm   Search... 🔍

stage
SCREENING ⚙

3 DEALS

18P0034 - screening 2/6
101 Arkwright Drive ›
Ⓒ Ⓡ Ⓜ

18P0037
15 Commuter Drive ›
Ⓒ Ⓡ Ⓜ

18P0043
45 Locomotive Crescent ›
Ⓒ Ⓡ Ⓜ

⊕ Add Deal

18P0034 - 101 Arkwright Drive
Closing Date: September 29, 2016   ✉ 💬

People   📋   📄 Documents

Checklist   ▥ ☰

☐ Checkbox Off

☑ Checkbox On

☐ Checkbox Disabled

☐ Checkbox Off

☑ Checkbox On

☐ Checkbox Disabled

☐ Checkbox Off

Recent Activities

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+ NEW

OWNER   All Users ▼

Search... 🔍

stage
SCREENING ⚙

3 DEALS

18P0034 - screening 2/6
101 Arkwright Drive ⟩
Ⓒ Ⓡ Ⓜ

18P0037
15 Commuter Drive ⟩
Ⓒ Ⓡ Ⓜ

18P0043
45 Locomotive Crescent ⟩
Ⓒ Ⓡ Ⓜ

18P0034 - 101 Arkwright Drive
Closing Date: September 29, 2016   ✉ 💬

👥 People   📋 Checklist   📄 Documents

Client(s)   Realtor   Mortgage Agent   Cooperating Law Firm

SELLER 1/2

FIRST NAME | MIDDLE NAME | LAST NAME
Singaravelan | Naduperyar | Lankeswaranaar

PHONE | | PHONE
41612345678 | mobile ⌄ | 41612345678 | work ⌄
+ add one more

EMAIL | DATE OF BIRTH | MARITAL STATUS
sing@gmail.com | 1979-04-12 | Married ⌄

SPOUSE INFORMATION

FIRST NAME | MIDDLE NAME | LAST NAME
Nalini | Naduperyar | Singaravelan

PHONE | | DATE OF BIRTH
41612345678 | mobile | 1979-04-12
+ add one more

SELLER 2/2

FIRST NAME | MIDDLE NAME | LAST NAME
Singaravelan | Naduperyar | Lankeswaranaar

PHONE | | PHONE

Recent Activities

All Activities ▼

Deal Updated
APS document added
Ⓡ Sri Lankes
Sep 14, 2016 at 12:30

Deal Updated
Changed Stage to *Title Search*
Ⓛ Abi Singam
Sep 13, 2016 at 15:25

Note Added
"Client is annoyed that Mortgage agent is unreachable"
Ⓛ Abi Singam
Sep 13, 2016 at 15:25

Note Added
"Need to update client by tomorrow about funds"
Ⓛ Abi Singam
Sep 13, 2016 at 15:25