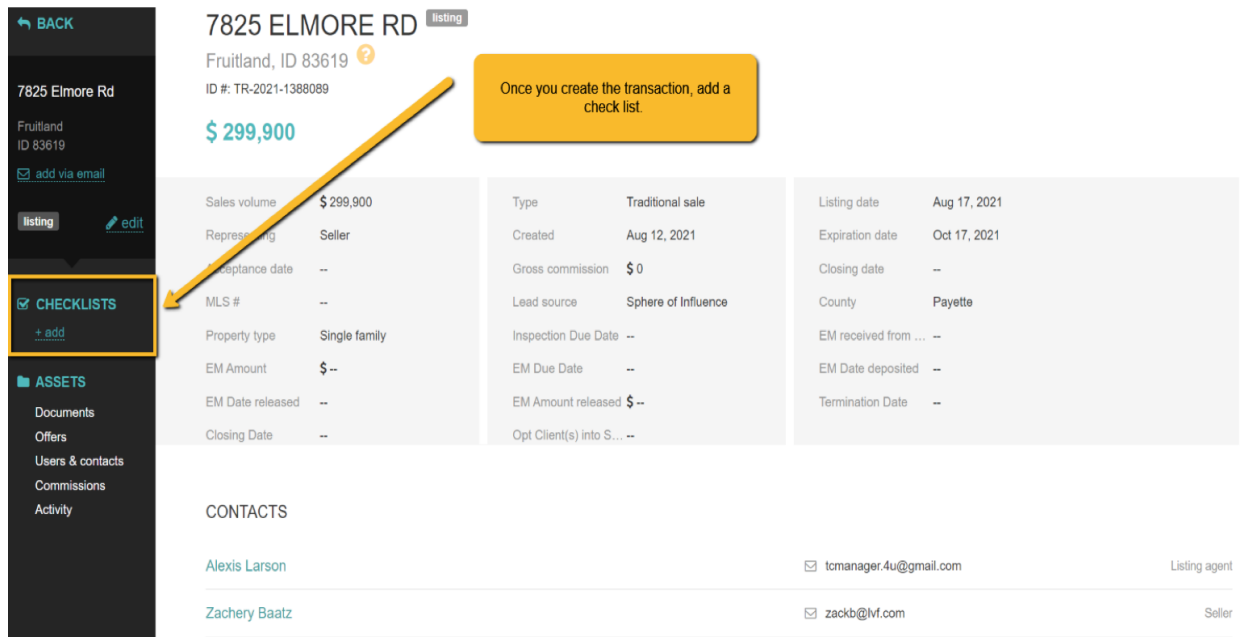


## Most missed steps in Brokermint:

1. Adding a Checklist. (This must take place in order to assign documents) If you are not able to assign from the unsorted, this is probably why)
2. Assigning Documents.
3. Submitting for review.

Here are some step by step instructions on what order to accomplish these missed steps.



**7825 ELMORE RD** listing  
Fruitland, ID 83619 ?  
ID #: TR-2021-1388089  
**\$ 299,900**

BACK

7825 Elmore Rd  
Fruitland  
ID 83619  
add via email  
listing edit

CHECKLISTS  
+ add

ASSETS  
Documents  
Offers  
Users & contacts  
Commissions  
Activity

Sales volume	\$ 299,900	Type	Traditional sale	Listing date	Aug 17, 2021
Representing	Seller	Created	Aug 12, 2021	Expiration date	Oct 17, 2021
Acceptance date	--	Gross commission	\$ 0	Closing date	--
MLS #	--	Lead source	Sphere of Influence	County	Payette
Property type	Single family	Inspection Due Date	--	EM received from ...	--
EM Amount	\$--	EM Due Date	--	EM Date deposited	--
EM Date released	--	EM Amount released	\$--	Termination Date	--
Closing Date	--	Opt Client(s) into S...	--		

CONTACTS

Alexis Larson	✉ tcmanager.4u@gmail.com	Listing agent
Zachery Baatz	✉ zackb@lvf.com	Seller

Once you create the transaction, add a check list.

# ADD CHECKLIST

Template: Buyer Terminated Offer Tasks ▾

- Buyer Terminated Offer Tasks
- Buying
- Listing
- Seller Terminated Offer Tasks

Select the type of transaction.

This template confirms or

transaction milestones. Please

Termination Date

Transaction coordinator

Type name...

Add

Cancel

Opt Client(s) into S... --

**BACK**

7825 Elmore Rd  
Fruitland  
ID 83619  
[add via email](#)

**listing** [edit](#)

**CHECKLISTS**  
Listing  
[+ add](#)

**ASSETS**

- Documents**
  - Unsorted
- Offers
- Users & contacts
- Commissions
- Activity

**ALL DOCUMENTS**

Date	User	Document Name	Action
AUG 12	AL	Agency Relationship Disclosure (Blue Brochure)	Upload
AUG 12	AL	Seller Representation (RE16)	Upload
AUG 12	AL	Due Diligence Disclosure	Upload
AUG 12	AL	IMLS Data Form	Upload
AUG 12	AL	Property Disclosure (seller signed)	Upload
	AL	Purchase Agreement	Upload
	AL	Lead Based Paint	Upload
	AL	Earnest Money	Upload
	AL	Earnest Money Receipt	Upload
	AL	Property Disclosure (All Signed)	Upload
	AL	Counter Offer #1	Upload
	AL	Counter Offer #2	Upload

**Agency Relationship Disc**  
Assigned to: Alexis Larson

[Upload](#) [Use forms](#)

**COMMENTS & ACTIVITY (0)**  
Type comment here

**Next, add your documents by clicking documents then unsorted.**

**BACK**

7825 Elmore Rd  
Fruitland  
ID 83619  
[add via email](#)

**listing** [edit](#)

**CHECKLISTS**  
Listing  
[+ add](#)

**ASSETS**

- Documents
- Unsorted**
- Offers
- Users & contacts
- Commissions
- Activity

**UNSORTED DOCUMENTS** ?  
a11637tr1388089@trfit.com

**Add document**

- Upload file
- Pull from DocuSign

**This transaction doesn't have any unsorted documents**

Upload documents here by clicking "Add document" below, or simply grab one or more documents and drag them here.  
You can also upload documents from your **DocuSign** account.

**Add document**

**Click Add Document, and upload file or drag and drop.**

## 6 UNSORTED DOCUMENTS ?

a11637tr1388089@trfit.com

Add document -

Step 1

re 16 seller rep.pdf	5 pages
lead based paint disclosure se.pdf	1 page
imls data sheet.pdf	4 pages
imls data sheet.pdf	4 pages
due diligence disclosure.pdf	2 pages
agency disclosure brochure.pdf	2 pages

re 16 seller rep.pdf

Assign to...

Edit

Email

Downl

- Addendum #1
- Addendum #2
- Addendum #3
- Agency Relationship Disclosure (Blue Brochure)
- Counter Offer #1
- Counter Offer #2
- Counter Offer #3
- Due Diligence Disclosure
- Earnest Money
- Earnest Money Receipt
- IMLS Data Form
- Lead Based Paint
- Obtain/Review Settlement Statement
- Property Disclosure (All Signed)
- Property Disclosure (seller signed)
- Purchase Agreement
- Seller Representation (RE16)

Create new...

Step 2

Once documents are uploaded, go to Assign to then select the name of the document. Do this with each document in the unsorted documents.

## ALL DOCUMENTS ?

Action -

Submit for review (6)

Download all

AUG 12	AL	Agency Relationship Disclosure (Blue Brochure)	
AUG 12	AL	Seller Representation (RE16)	uploaded
AUG 12	AL	Due Diligence Disclosure	uploaded
AUG 12	AL	IMLS Data Form	uploaded
AUG 12	AL	Property Disclosure (seller signed)	Upload
	AL	IMLS	uploaded
	AL	Purchase Agreement	Upload
	AL	Lead Based Paint	uploaded
	AL	Earnest Money	Upload
	AL	Earnest Money Receipt	Upload
	AL	Property Disclosure (All Signed)	Upload
	AL	Counter Offer #1	Upload
	AL	Counter Offer #2	Upload
	AL	Counter Offer #3	Upload

Final step: Go to Action then Submit for Review. TC and Broker are then notified that you submitted documents and can check for compliance issues and notify you.

### Agency Relationship Disclosure (Blue Brochure)

Assigned to: Alexis Larson

Download

Email

Submit

De

Unassign

eSign

COMMENTS & ACTIVITY (0)

Agency ID: 1870308-0001-001-001-001-001

### Agency Disclosure Brochure

A Consumer Guide to Understanding Agency Relationships in Real Estate Transactions

Duties owed to Idaho consumers by a real estate licensee and as defined in the Idaho Real Estate Brokerage Representation Act, Title 54-2097.

This informational brochure is published by the Idaho Real Estate Commission. Effective July 1, 2020.

"Agency" is a term used in Idaho law that describes the relationship between some parties to a real estate transaction.

**Right Now You Are a Customer** Idaho law says a real estate licensee must follow "Customer" duties to all customers.

- Perform necessary and customary acts to assist you in the purchase or sale.
- Perform these acts with honesty, good faith, reasonable skill and care.
- Properly account for money or property you place in the care and responsibility of the licensee.
- Disclose "adverse material facts" which the licensee knows or reasonably believes that would significantly affect the desirability or value of the property to a reasonable person.

If you are a Customer, a real estate licensee is not required to promote your best interests. If you use the services of a licensee and broker, you will remain a Customer throughout the transaction.















A Compensation Agreement is a written contract that requires you to pay a fee for a specific service and it is not the same as a Representation Agreement. If you sign a Compensation Agreement, you will remain a Customer.

- Be available to receive and present written offers and counter-offers to you.

**You May Become a Client** If you want a licensee and broker to represent you in a real estate transaction, you can become a Client by signing a Representation (Agency) Agreement. This agreement will set out the following Client duties owed to a Customer:

- Perform the terms of the written agreement.
- Exercise reasonable skill and care.
- Promote your best interests in good faith, honesty, and fair dealing.
- Maintain the confidentiality of your information, including bargaining information.
- Properly account for money or property you place in the care and responsibility of the licensee.
- Find a property for you or a buyer for your property, and assist you in negotiating the purchase or sale.

## ALL ▾ DOCUMENTS ?

AUG 12	AL	 Agency Relationship Disclosure (Blue Brochure)	
AUG 12	AL	 Seller Representation (RE16)	uploaded
AUG 12	AL	 Due Dilligence Disclosure	uploaded
AUG 12	AL	 IMLS Data Form	uploaded
AUG 12	AL	 Property Disclosure (seller signed)	<input type="button" value="Upload"/>
	AL	 IMLS	uploaded
	AL	 Purchase Agreement	<input type="button" value="Upload"/>
	AL	 Lead Based Paint	uploaded
	AL	 Earnest Money	<input type="button" value="Upload"/>
	AL	 Earnest Money Receipt	<input type="button" value="Upload"/>
	AL	 Property Disclosure (All Signed)	<input type="button" value="Upload"/>
	AL	 Counter Offer #1	<input type="button" value="Upload"/>
	AL	 Counter Offer #2	<input type="button" value="Upload"/>
	AL	 Counter Offer #3	<input type="button" value="Upload"/>

Action ▾

Submit for review (6)

Download all

Final step: Go to Action>then Submit for Review. TC and Broker are then notified that you submitted documents and can check for compliance issues and notify you.