# Listing Process

Prepare the Listing

- Note that this tutorial does not include information on how to select the appropriate comps, how to create a CMA, how to perform a listing consultation, or how to determine price. Please rely on your broker for those items. This tutorial will only cover how to prepare the paperwork for your listing. As each transaction is different, this tutorial cannot possibly include each potential variable, and is only meant to act as a general guideline.

- You will begin the listing paperwork process by verifying the correct address and owner names by pulling the tax records. Login to FMLS, hover over Products, then click on Matrix.
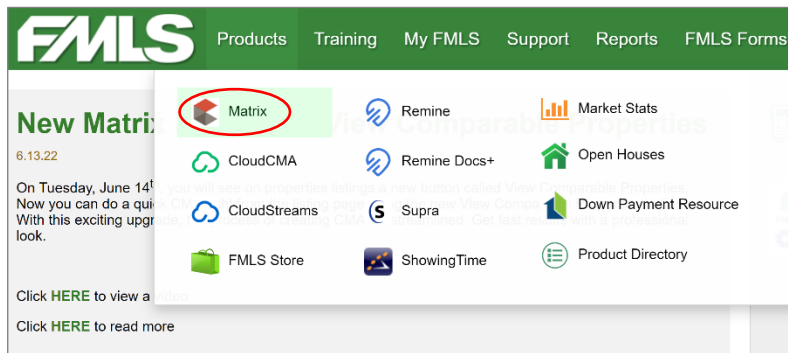
- Click on Public Records. This will open the Realist Dashboard in a new tab.

- Enter the property address in the Address field, then click Search.
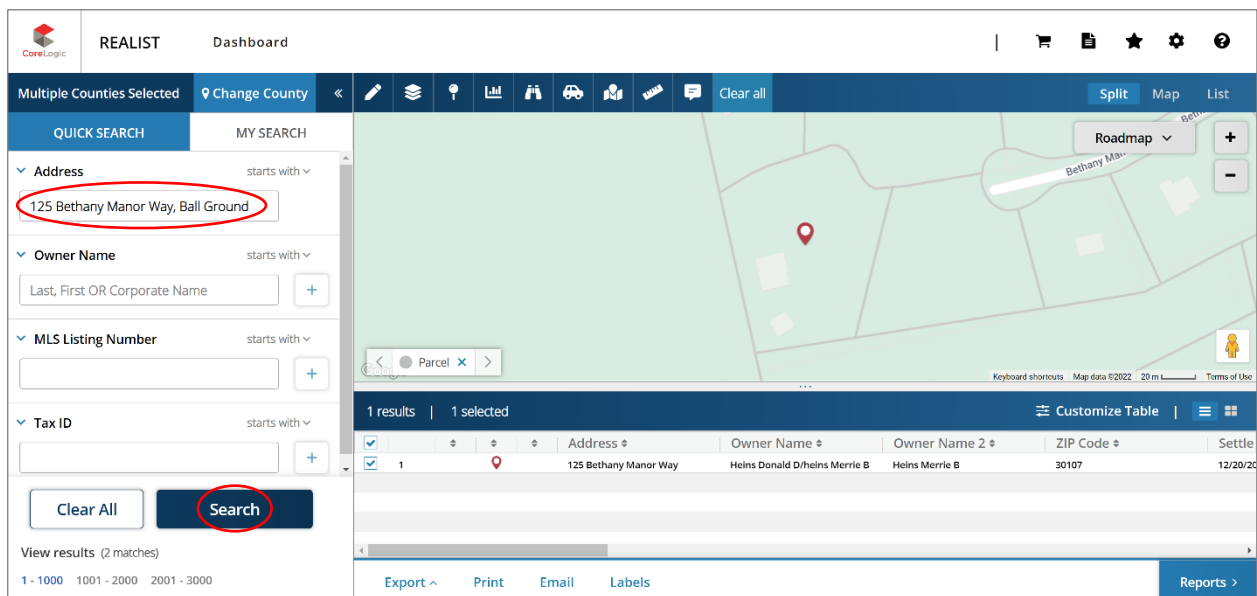
▪ This will display the property details, including the correct address and owner names as shown on the deed, along with other key details, such as subdivision, year built, square footage, lot size, and tax ID number. You will use this info to complete the Listing Agreement and to later enter the listing into the MLS. You will want to create a folder on your computer to begin saving documents. Click on Print in the upper right-hand corner, then Quick Print. You will print to PDF. You may close the Realist tab, but do not exit FMLS yet.

▪ Back in FMLS Matrix, you will gather a few more details that you'll need later on in the listing process. First, you may wish to look for any previous listings for this property for research purposes. Returning to Matrix, you'll enter the property address, minus the street type, in the speedbar (for example, "125 Bethany Manor" rather than "125 Bethany Manor Way"), then hit Enter. This will display any time the subject property has been listed, including all statuses.

▪ Review any applicable previous listings (sometimes there are none). If you wish to save them, select them by placing a check to the left of the listing, then click Print at the bottom. Select the Agent Full report, then click Print. Then save it on your computer.

▪ Now you will want to see if the property is in an HOA. Open a previous listing, or open recent listings within the same subdivision. Scroll down to the Legal / Financial / Tax Information section and look to see if there is any HOA info available. If there are blanks or zeroes, the property is likely not in an HOA. If you see figures in the Association Fee field (for example, $250/month), the property is likely in an HOA. Always verify with your seller, however, as some HOAs are not mandatory, but they will still need to be disclosed.

▪ You will also want to make a note on which school districts the property is in. You can get this from a previous listing or recent listings within the same subdivision or neighborhood. You may also be able to find the school districts in Realist, by using its map layers, or you may be able to find it on the school district's website. Again, be sure to verify with your seller, as school districts can change.

▪ Next, you need to pull the Deed, Legal Description, and Plat. Login to GSCCCA. Click on Search, then Real Estate Index, then Book Page Search.

▪ Select the County that the property is in. Then the Deed Book and Page can be found on the Realist report that you saved earlier. It will be the most recent sale, typically shown at the top of the Last Market Sale & Sales History section. Enter that info, then click Search.

- GSCCCA will display the search results. Verify that it is the correct record, then click View Image.

- The warranty deed will appear in a new window. Click the Print icon in the upper right-hand corner and save it to your computer.

- While you're in this view, zoom in on the legal description and do a screen capture. The legal description will be its own paragraph and will begin with "All that tract or parcel of land lying and being in…"
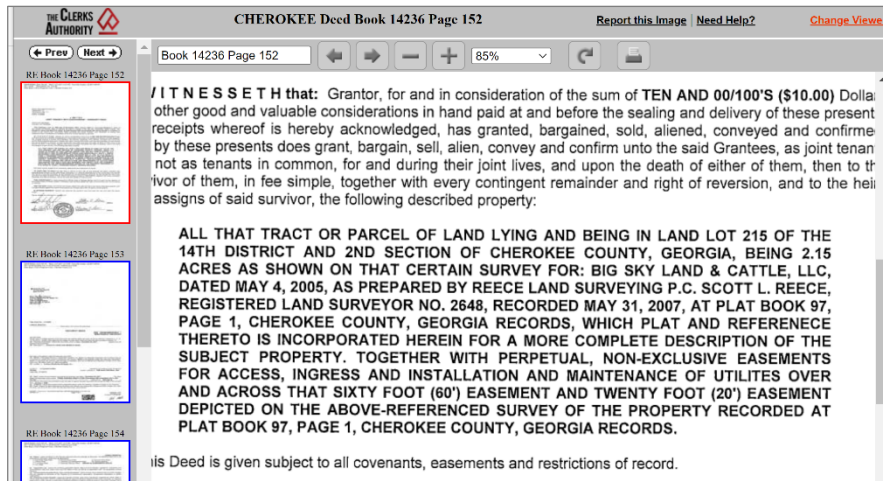
- Open a blank Word document, type the property address at the top, then Legal Description, then paste the screen capture. Crop the image down so that the final product is a clean document, like this:
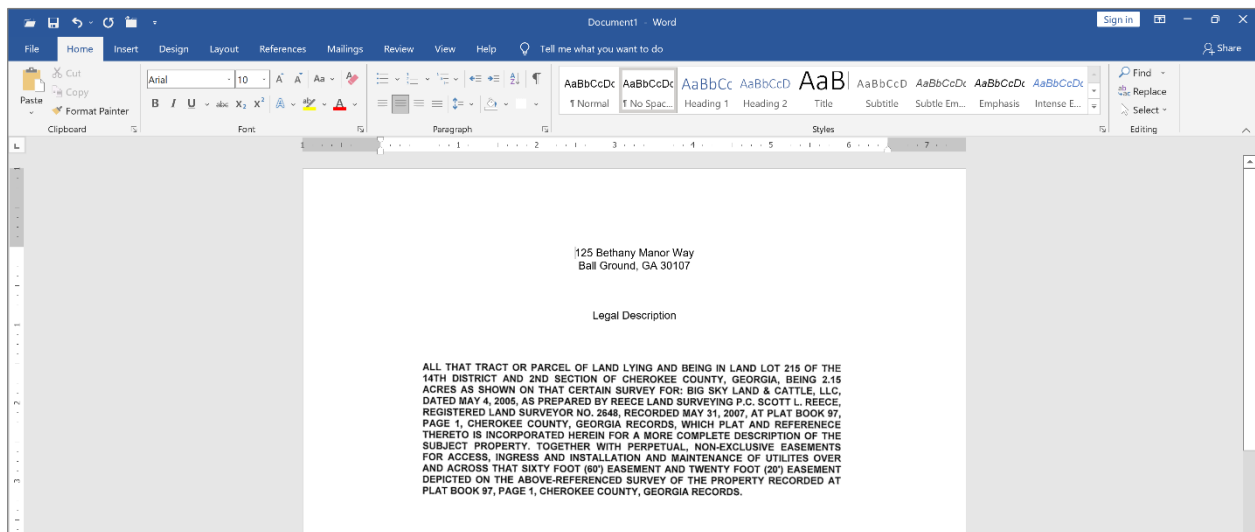
- Save the file as a PDF on your computer.
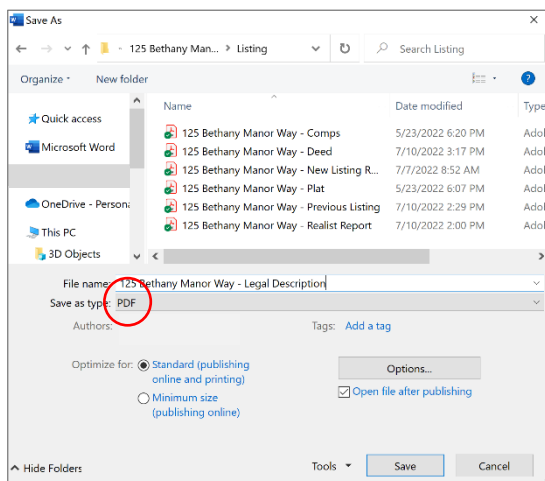
- Returning to GSCCCA, you will exit the pop-up window that displayed the deed, returning to the search results. From here, you will click on the link to the Plat (if available).
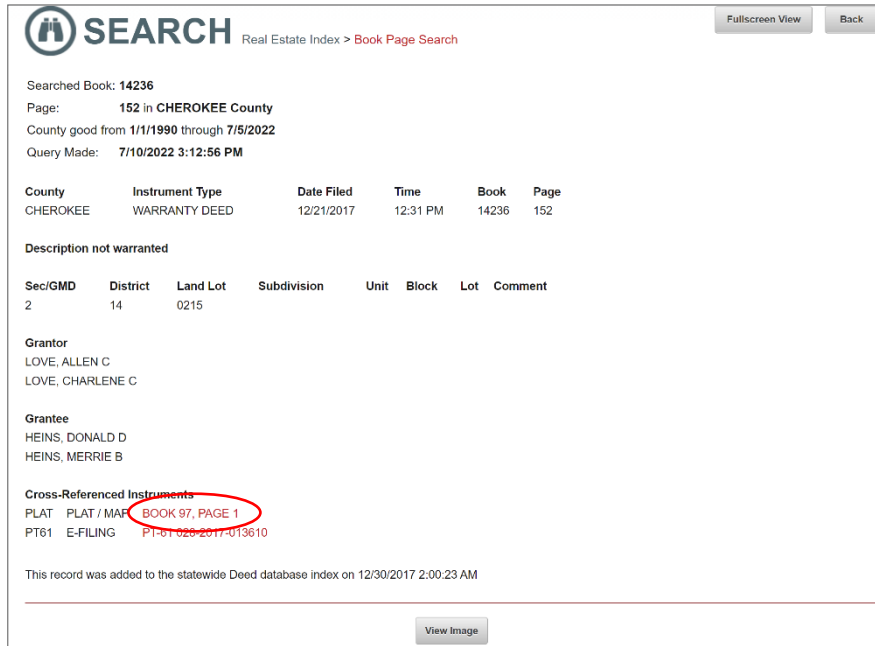
- A new search window will display, then click View Image. The plat will appear in a new window. Click the Print icon in the upper right-hand corner and save it to your computer. You can exit GSCCCA when you are done.
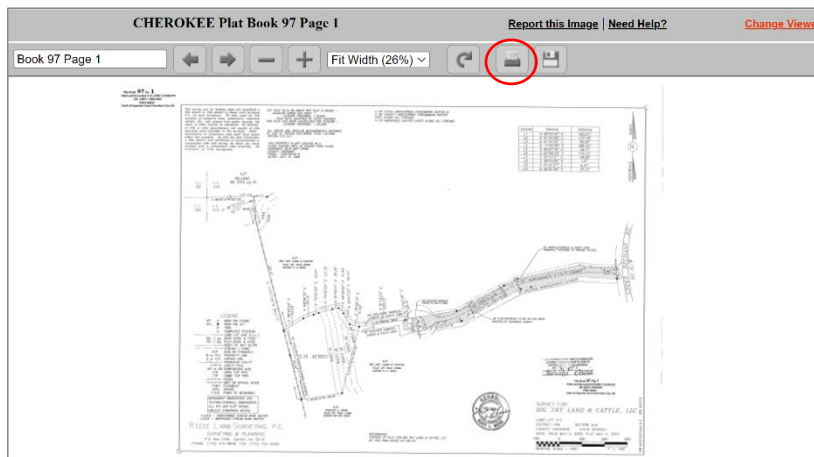
- If you do not have access to GSCCCA, you can ask a closing attorney partner to help you pull the deed and legal description for your listing. In addition, certain counties offer their deeds online for free. Here are a few:

  - Cherokee County: https://deeds.cherokeega.com/
  - Cobb County: https://research.cobbsuperiorcourtclerk.com/
  - Douglas County: http://deeds.co.douglas.ga.us/External/LandRecords/protected/v4/SrchName.aspx
  - Forsyth County: https://resolution.forsythco.com/External/LandRecords/protected/SrchQuickName.aspx

- Next, you will need to set up the client in DocuSign to sign the listing agreement and complete the property disclosures. Login to DocuSign. Click on your profile picture (it will display your initials if you haven't loaded a profile picture) in the upper right-hand corner and Switch To Rooms.
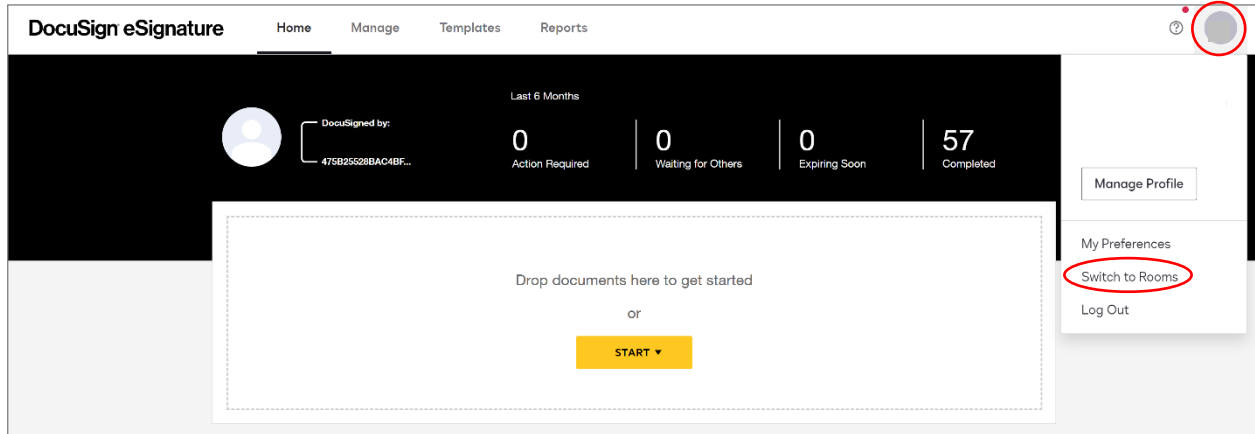
- From the Dashboard, click on Rooms.
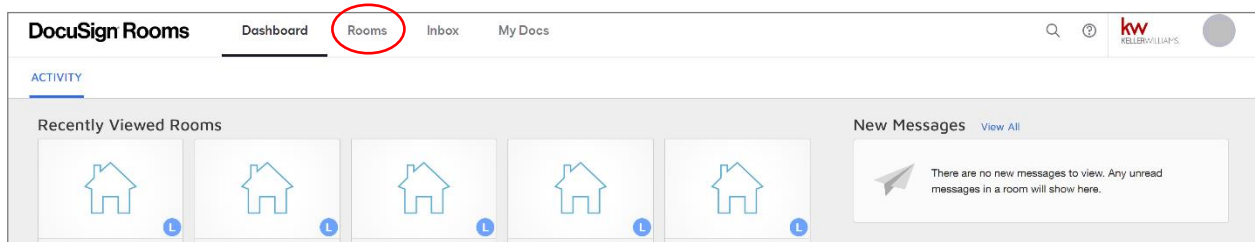
- Select New.
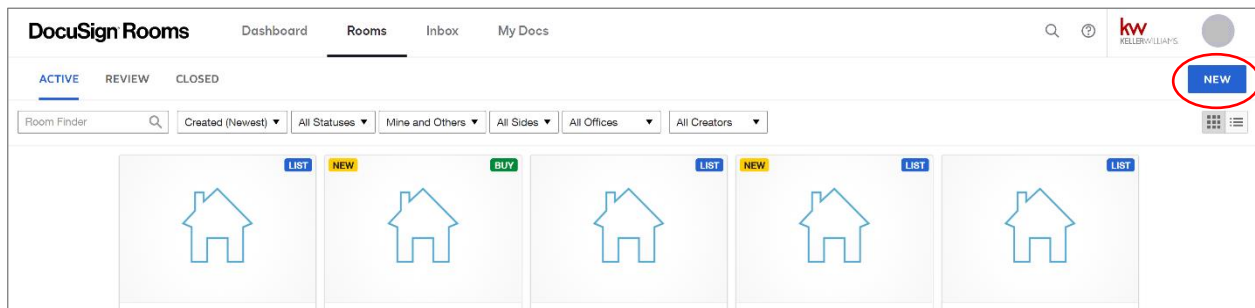
- Name the room, then select Agent Owner as the role, select List Side, then click Save.
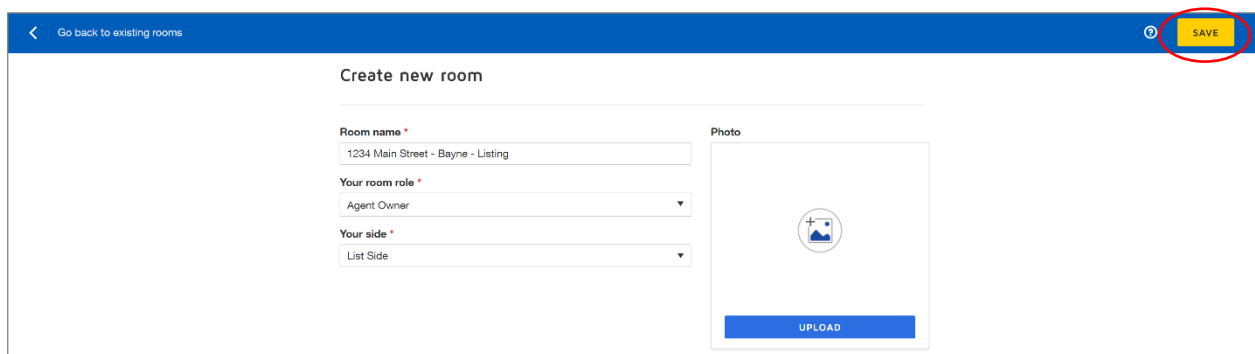
▪ On the Details tab, click Edit and fill in the address, seller name and contact info, and your name and contact info as the listing agent. This will help you auto-fill forms as you go along. Save when you are done.
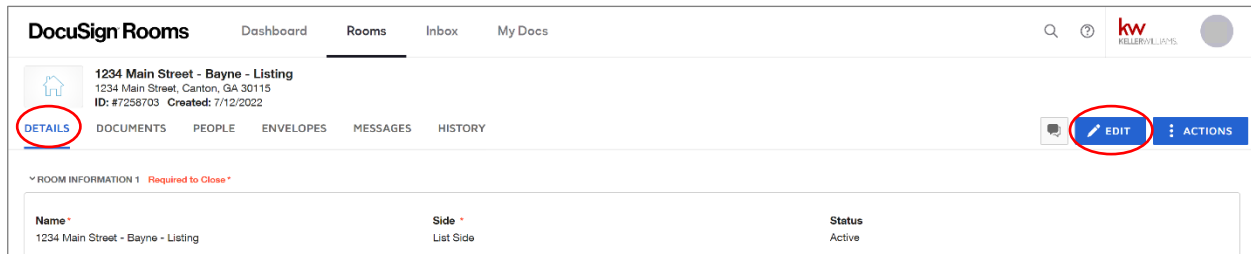
▪ Click on Documents to begin adding forms to your Room. Click Add in the upper right corner. Then select DocuSign Forms.
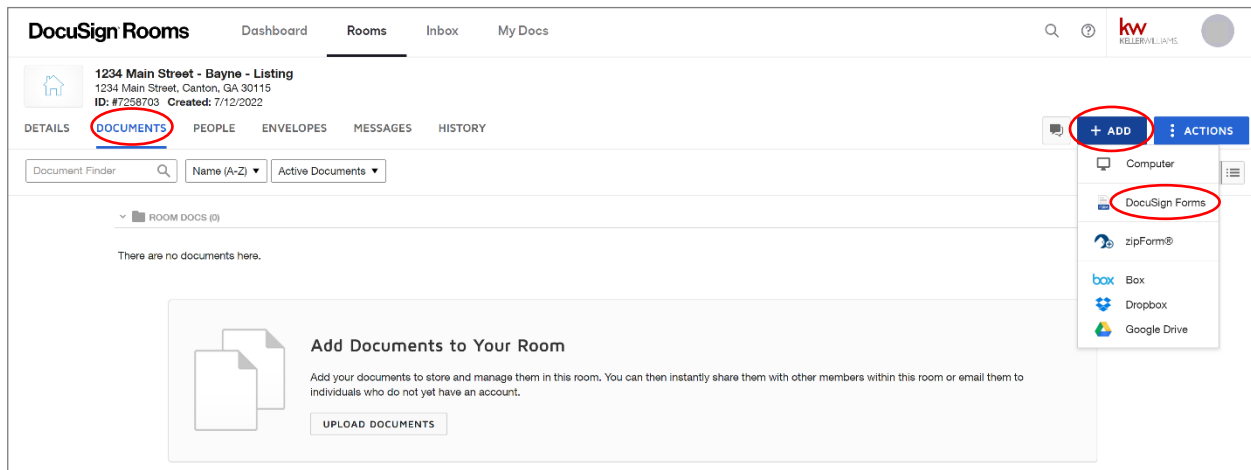
▪ When the dialogue box pops up, choose GAR Forms on the left, then search for the Exclusive Seller Listing Agreement in the search bar. Once the results pop up, place a check next to the form and click Add Selected.
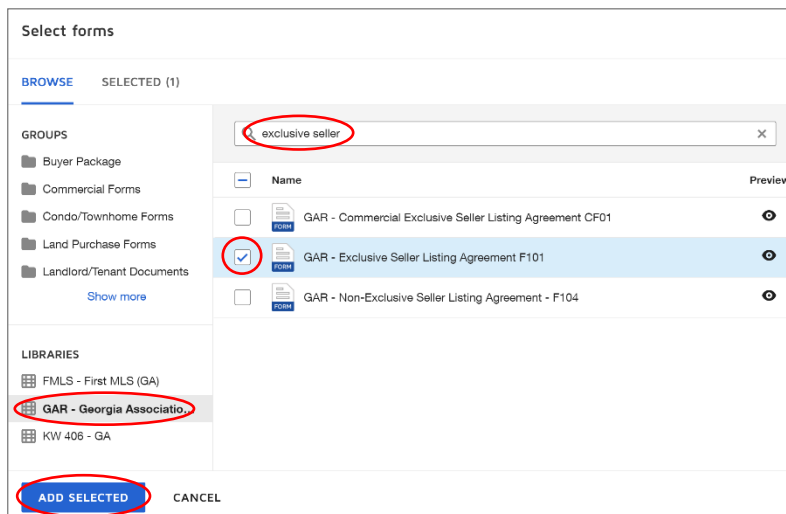
- Click on the image of the form to begin filling it out. The information you entered in the Details tab should auto-fill. Click Save & Close when you're done filling out the form. This will return you to the Documents tab.
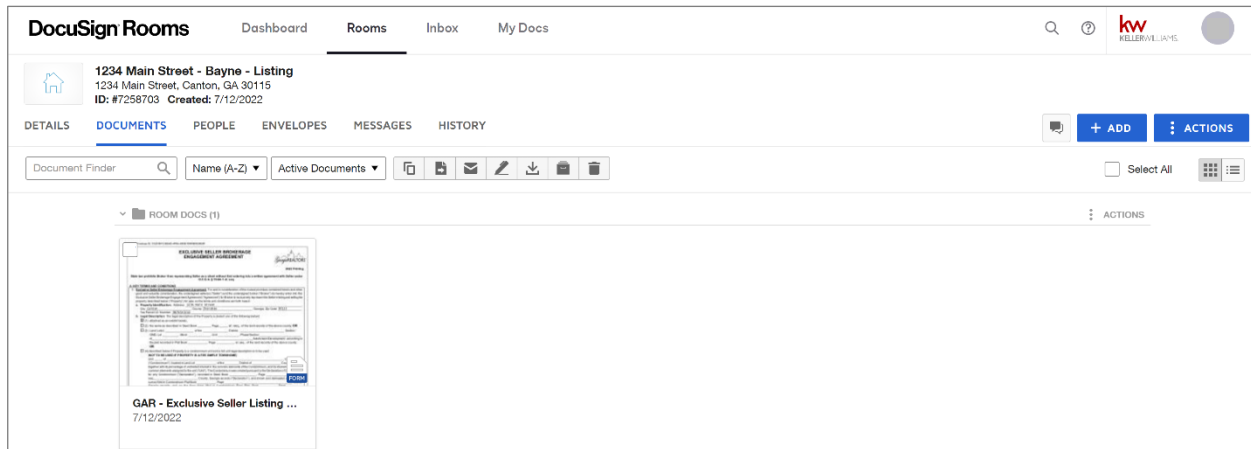
- You will need to follow the same process to add the Seller's Property Disclosure, Community Association Disclosure, and Lead-Based Paint Exhibit, as applicable. You may fill in the address at the top of these forms, but you must have your seller complete the remainder of each form. Be sure to also include any additional disclosures that your broker may require your seller to sign (for example, Marketing Service Agreements, Affiliated Business Disclosures, or Wire Fraud Disclosures), and any GAR pamphlets that you wish to share with the seller, such as "Protect Yourself When Selling Real Property" or the Lead-Based Paint Pamphlet.

- To send the form off for completion and signatures, place a check in the upper left-hand corner of the form. Then click on the pen icon (Create Envelope) to send the form to the eSignature portion of DocuSign. You can select multiple forms to send at once, if so desired.
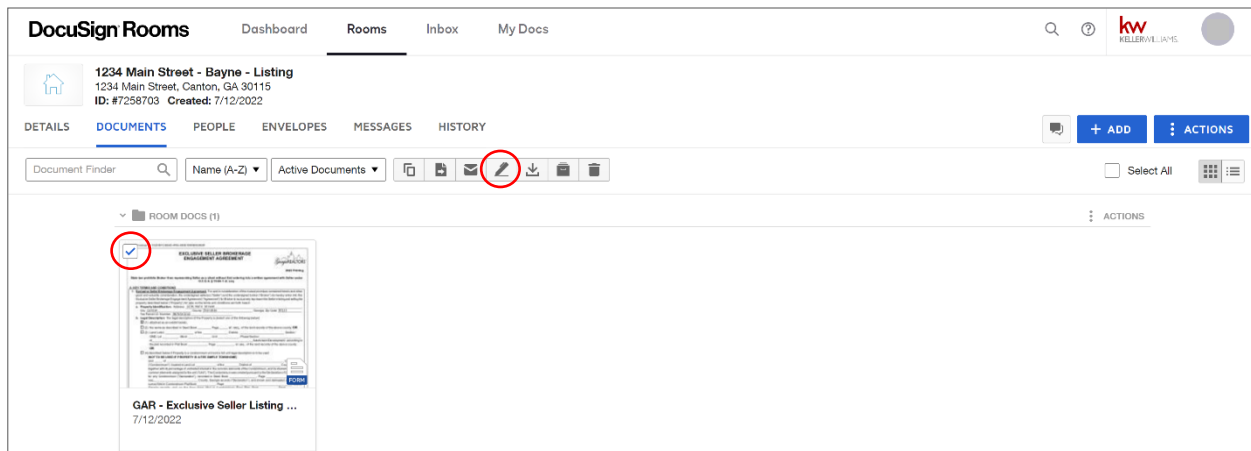
- DocuSign will ask you who you wish to send the form to. Check all the recipients that need to sign. If there are some recipients missing, you can add them on the next screen.
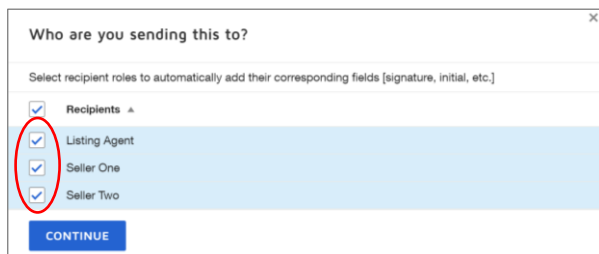
▪ At the top of the page, you should see all the forms that you selected to send off for signature. You can add additional documents using the Upload button. You may wish to get your seller's initials on a separate document that was not created in DocuSign, like a deed or legal description, for example. You may also drag and drop the forms to reorder them, if so desired.
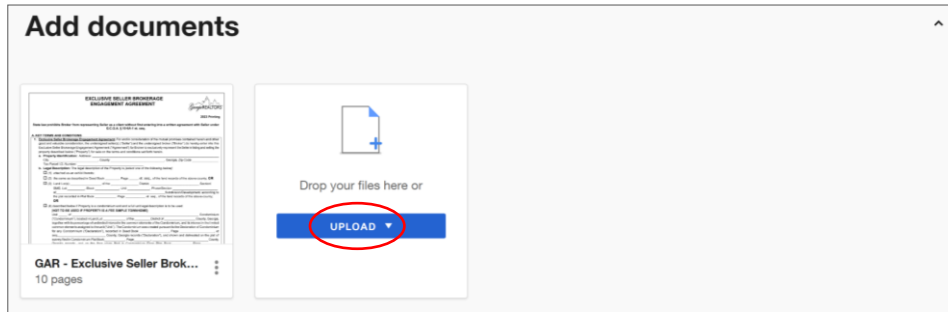
▪ You can click the three dots at the lower right corner of each form to view other options for each document. "Set as Supplement" is a good option to use for GAR pamphlets that do not require signature, but are being shared as additional information.

- Next, you will add recipients and choose the order in which each recipient will sign. The names and email addresses for the recipients you chose a moment ago should already be in place. If not, you may add them now. Be sure the "Set Signing Order" box is checked. Place a 1 next to your name so you sign first. Be sure that the email address it shows for you is the one you logged in with. (Doing this makes it easier for you to sign the document while you are still logged in to DocuSign.) Place a 2 next to each seller client so they sign second. (If there is more than one seller, they will each be assigned a 2 so that they receive the documents at the same time.) You can click the Add Recipient button to add any additional signers, then assign them a signing order. If you have an admin that needs a copy of the completed documents, enter their name and email address, then assign them a number so that they receive the documents last. Change the drop-down menu next to their name from "Needs to Sign" to "Receives a Copy." Note that DocuSign automatically emails a final signed copy of each document to each of the actual signers, so you will not need to send a copy to the seller, because DocuSign will have already done so.

- Next, enter the Email Subject line. Be sure to include the property address so you can easily find it later. Then enter an email message to the recipients describing what they are signing.

- Below the email message, you will see that you can send automatic reminders to the recipients. You can select the desired frequency from the drop-down menu. If it is grayed out, click the Advanced Options button at the top of the page. In the dialogue box that appears, put a checkmark in the "Send Automatic Reminders" box and enter how often you'd like to send reminders. Then click Save.

- When you have finished with this page, click Next.

- Next, you will add signature fields to the document. Select the appropriate signer from the drop-down menu in the upper left corner. You will drag and drop signature, initial, text, checkbox, and date fields into their appropriate spots on each form. Scroll down to keep adding fields until all forms are complete.

- The Seller's Property Disclosure, Community Association Disclosure, and Lead-Based Paint Exhibit will have all fields and checkboxes automatically added for you. One thing you will want to do, however, is to allow your sellers to collaborate and to make certain fields required so they cannot be left blank.

- With the text field selected, you can choose if it is a required field or not by checking the "Required Field" box. Required fields will be shaded, and optional fields will be outlined. If you have multiple sellers, you will also check the "Recipients Can Collaborate" box for each field. This will allow each seller to be able to edit the field, regardless of who it was originally assigned to. You can click and drag your mouse to select multiple fields at once, so that you can apply this option to all fields quickly.
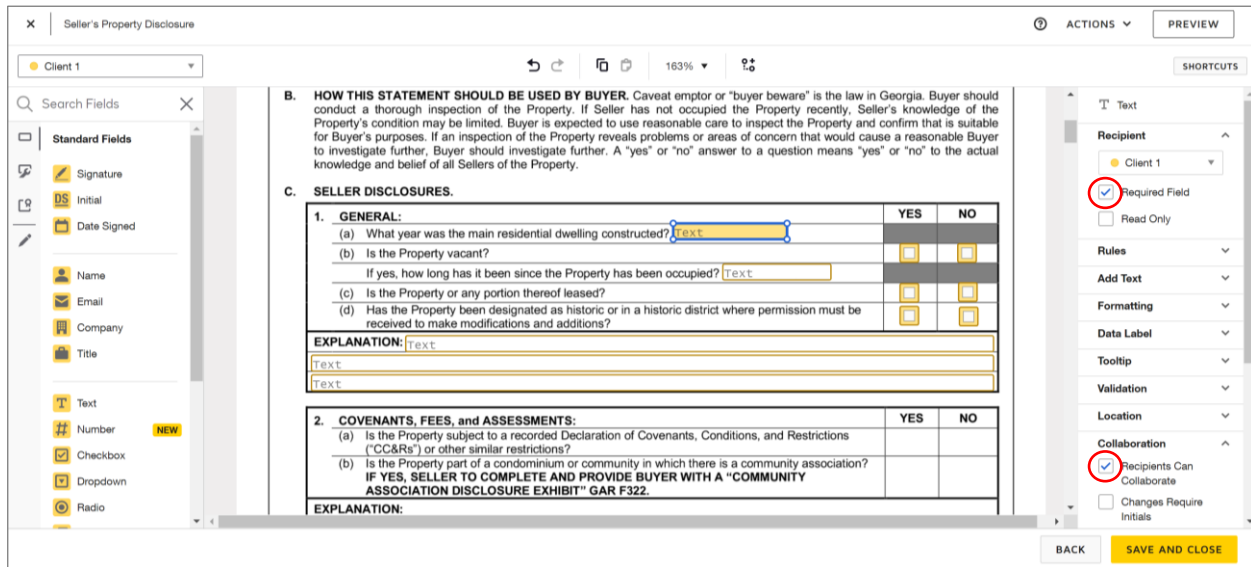
- All of the checkbox fields are optional, by default. If you wish to force your seller to answer yes or no, select the checkbox group by clicking and dragging your mouse to create a box around the group (or you may click, then Shift+click to select multiple checkboxes).
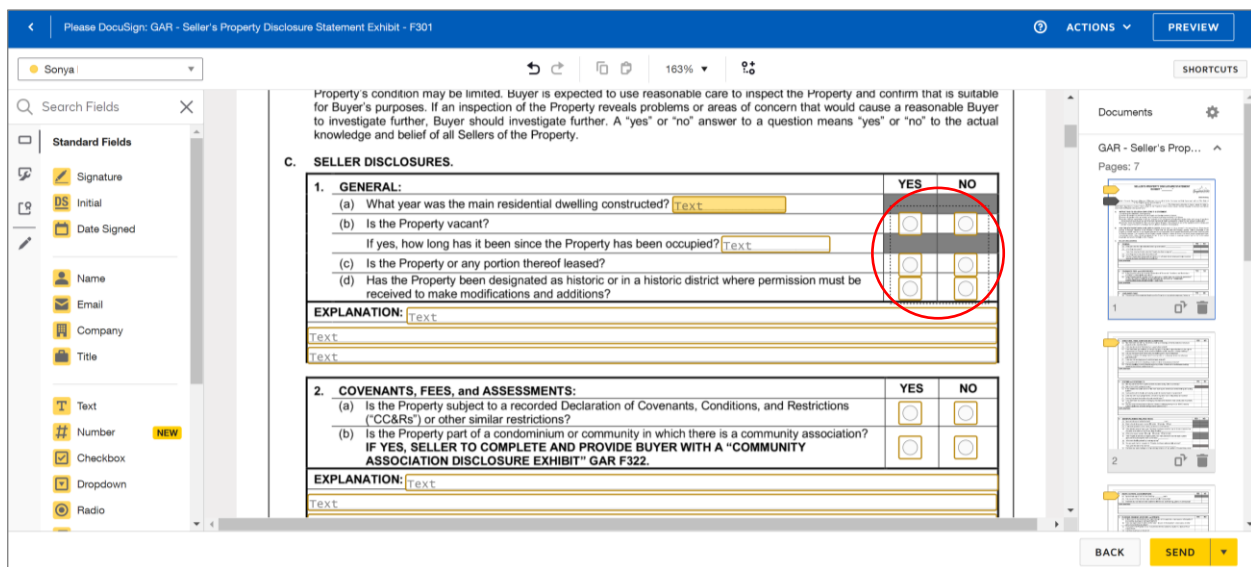
▪ Then select "Required Field." This will force the seller to enter an answer.
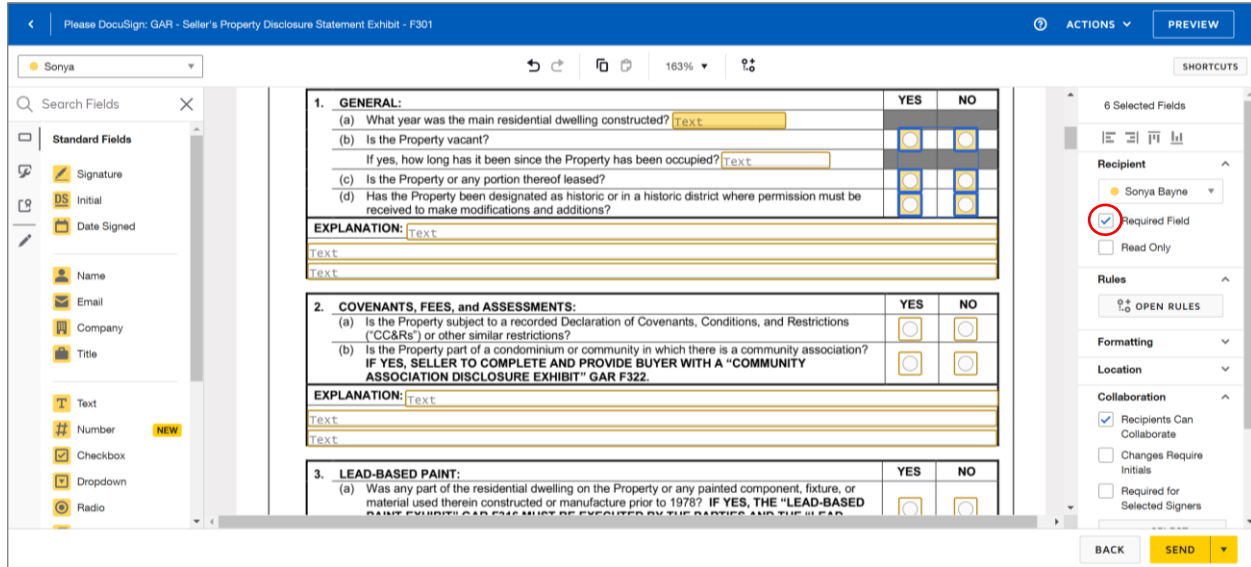
▪ For additional assistance with editing DocuSign fields, you may review these support articles:

https://support.docusign.com/s/document-item?language=en_US&bundleId=ulp1643236876813&topicId=ezn1578456259592.html&_LANG=enus

https://answers.kw.com/hc/en-us/articles/360035195694-Create-and-Send-an-Envelope-in-DocuSign-Send-Forms-for-Signatures-

▪ You may also choose to edit the placement of certain fields, if necessary. They are not always placed in the ideal location by default. When you are done assigning and arranging fields, click Send.
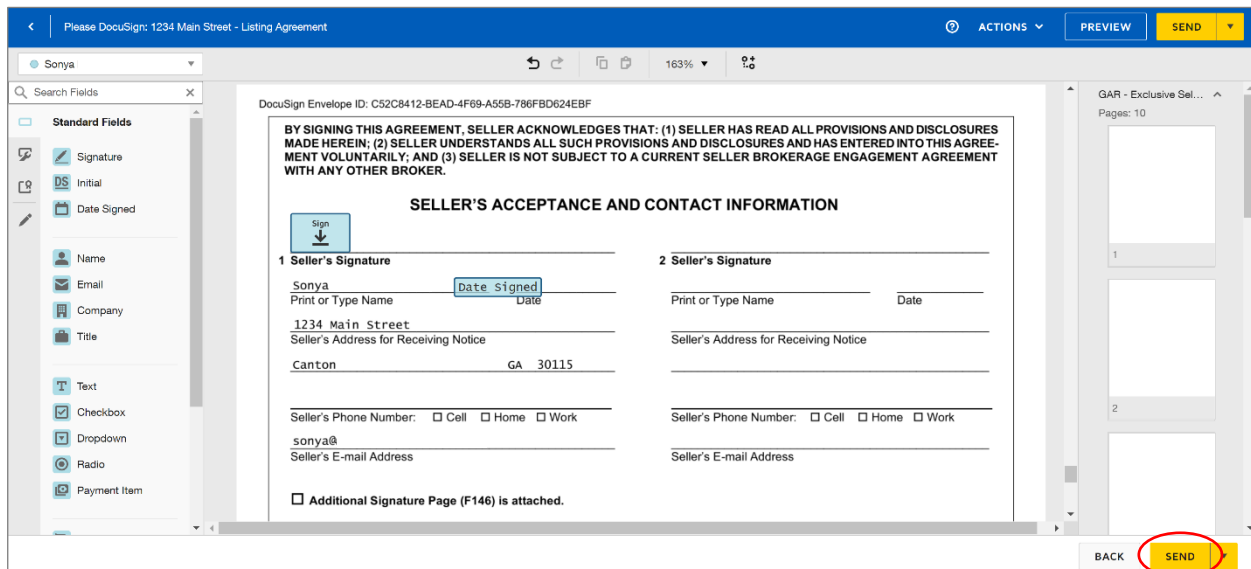
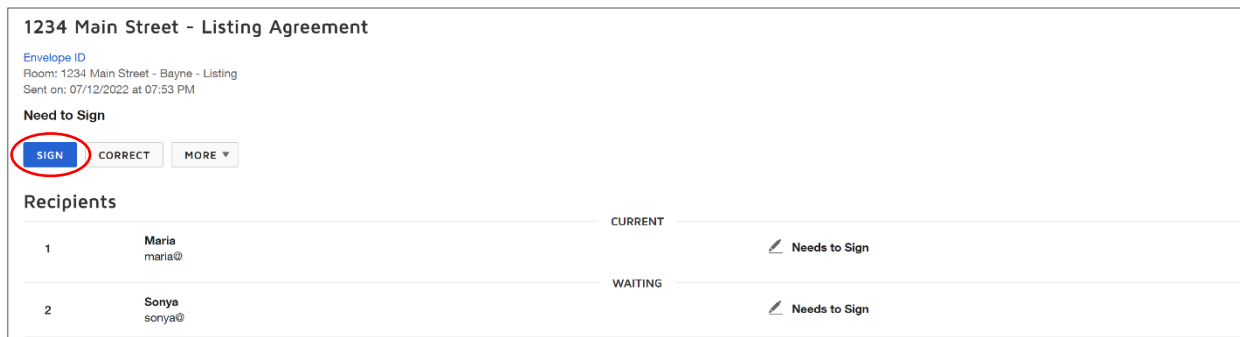- You will now be able to sign your portion of the Envelope. Go ahead and do so now or the next person in line will not receive it. The document will appear and say "Needs My Signature," so click there.
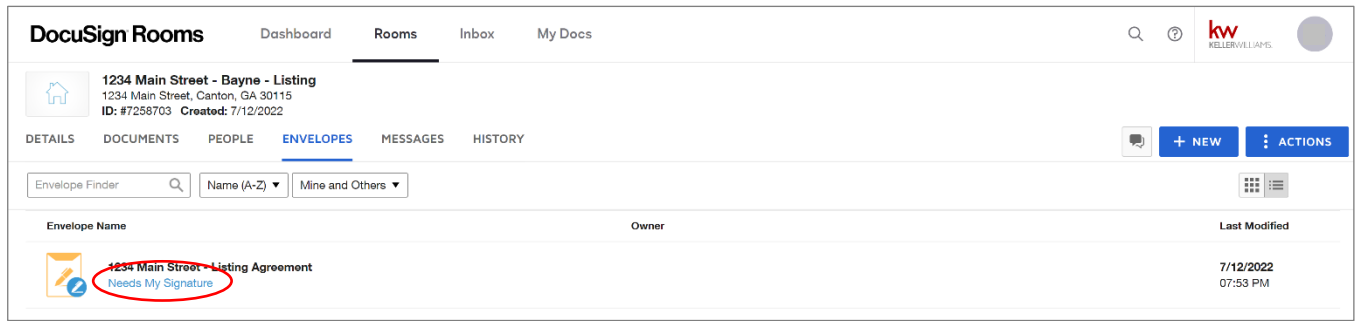
- On the next screen, click Sign.

- Click Continue.
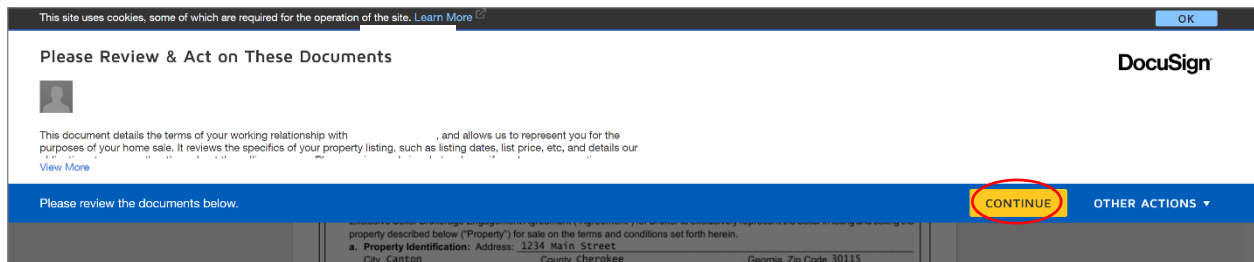
- Click Start, then DocuSign will automatically jump to each signing location. Click on each location and your signature or initials will appear. When you're done, click Finish. DocuSign will now route the envelope to the next Recipient.

▪ If you wish to check on the status of a document, from the DocuSign eSignature page, you can click on Manage, then Sent to see all Envelopes that you have sent out. 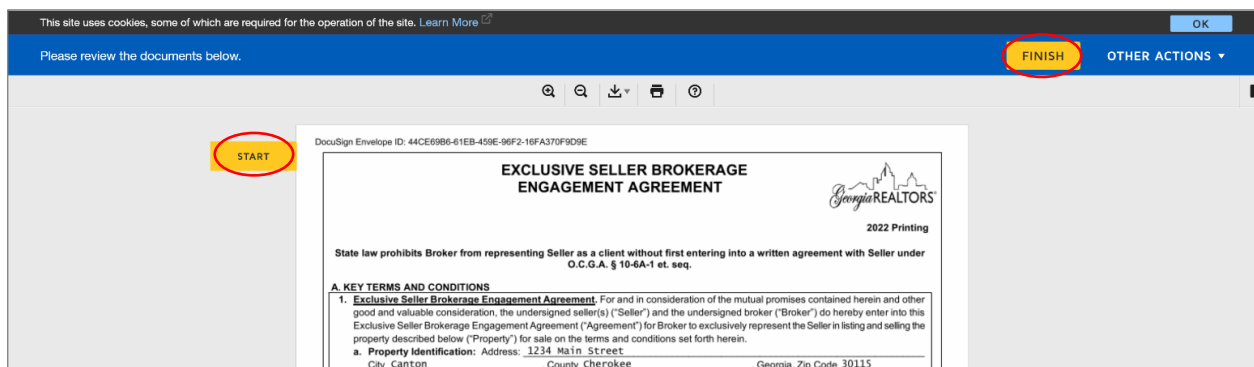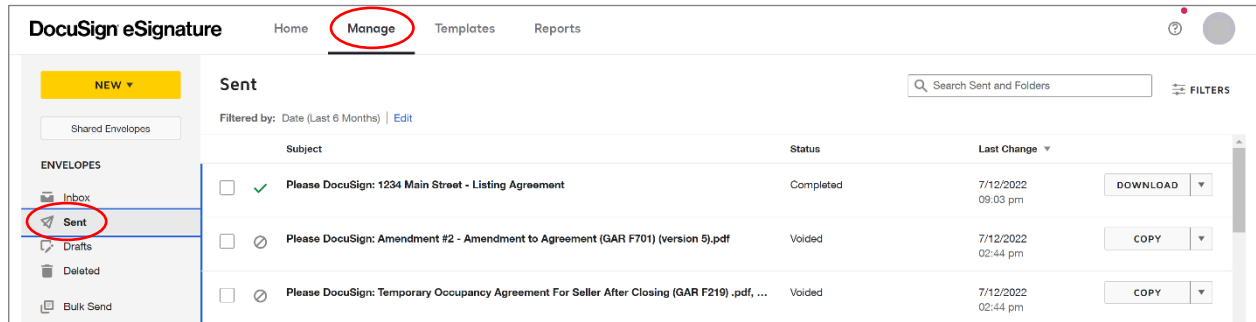From there, click on the Envelope you wish to view. You will see a summary of who has viewed or signed their documents and who is still waiting. You can also click on the document to view it in process.

▪ Once the documents are completed and signed, you will receive a copy in your email and so will each person that signed. Save each one on your computer. Be sure to bind the listing agreement after it has been signed.

▪ Next, schedule a stager, if necessary, then order the photos for the property. Work with these vendors and your seller to determine appointment times that work for all parties.

▪ Install a yard sign and a Supra lockbox at the property. Make a note of the lockbox's serial number and CBS code. Also verify the showing hours while you have the lockbox in your hand and reprogram them, if necessary. You cannot update these hours through the website later; it must be done in person.

▪ After the photographer has taken the photos, they will typically email you a link to download them. Save them to your computer. Rename them to rearrange them, if necessary. Ideally, the photos should be in a logical order, as though you were walking through the home. Front of the house, first level from the front door onward, then second level, then basement, then back of the home. Drone photos and amenity photos are typically shown last.