

SUCCESS WITH **BROKER REVIEW**

- When a contract is written or received, notify your broker via email with the date and property address
- Consistently upload all documents to Form Simplicity, submit for Broker Review as you receive fully signed documents
 - To start a Broker Review, click on the Broker Review tab inside of the transaction that you wish to have reviewed.
 - Apply the appropriate review checklist, depending on what type of transaction it is.
 - Click the pencil icon and choose the appropriate file to review. You will know it has been added when you see the yellow “Added” box pop up next to the document.
 - Leave any necessary notes for your broker, then click submit at the very bottom. The yellow boxes will change to “Submitted”.
- Your broker will receive an email letting them know that you have files waiting to be reviewed. If any items are incomplete, you will receive an email back notifying you that you have items that need your attention. If your items are complete, you’ll receive an email that your broker has marked all items complete and Locked your file. You are now ready to merge your final documents together.
- It is essential to only have one review checklist active for each transaction, to ensure that nothing gets missed or overlooked. Keep in mind that every listing requires a Listing Checklist Review as well as an Under Contract Checklist Review after it’s pending.