

tcDocs

Transaction Coordination Software

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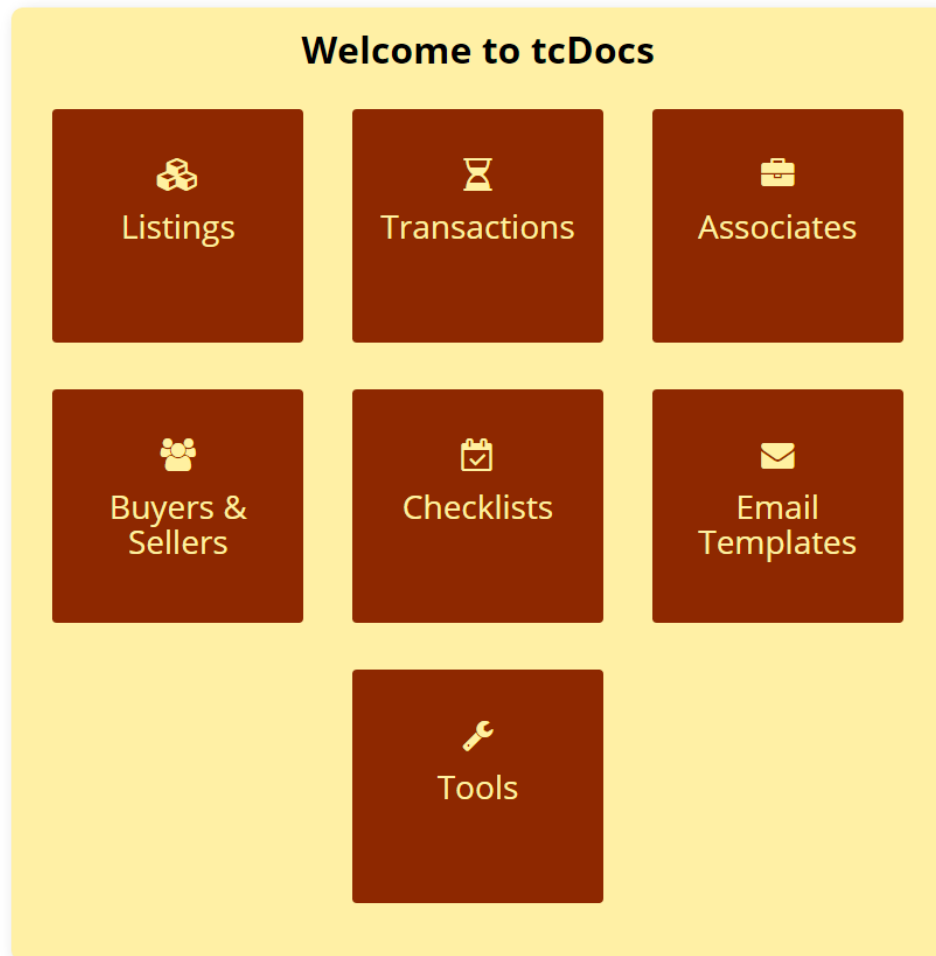


tcDocs | Introduction

tcDocs is built on the idea that an application should not be everything to everyone. In this respect tcDocs does only one thing – Real Estate Transaction Coordination! It is an application conceived by a Professional Transaction Coordinator who was formerly a Real Estate Broker with nearly two decades of experience. Her expert methodology for monitoring transactions is brought to life digitally by way of this application and as you will see will help ensure a deadline or milestone will never go unchecked!



tcDocs | Home Page



- **Listings**
Property purchases prior to agreed contracts
- **Transactions**
Property purchases in contract
- **Associates**
Professional participants in transactions (e.g. Agents, Escrow, Lenders, etc.)
- **Buyers & Sellers**
People (individuals or companies) participating as buyers and/or sellers within a transaction
- **Checklists**
Sets of tasks which may be custom tailored to transaction type and contingencies
- **Email Templates**
Emails personalized for every transaction need, auto-populated with transaction details
- **Tools**
Featured is a powerful State-rules-based date calculator

tcDocs | Transactions

Find Transactions Quickly by Entering Just about Anything, Including Names, Phone Numbers, Dates, Email Addresses, etc.

Actions

- « Back
- Add New!
- Today's Tasks
- Queue All Status Emails!
- Email Status Per Agent

⌚ Transactions 3

Search Transactions...

- ✘ JA(S) ANDREWS TO SMITH
12305 46TH AVE NE REDMOND WA 98053
CLOSING 9/9/2016
- ✘ BB(B) ANDREWS TO BUYER
435 5TH AVENUE SEATTLE WA 99999
CLOSING (DP) 9/16/2016
- ✘ JA(S) SMITH TO ANDREWS
333 MEDINA WAY BELLEVUE WA 99999
CLOSING 9/30/2016

Filter Transactions

Status

- Open
- Closed
- Canceled
- Archived

Sale Type

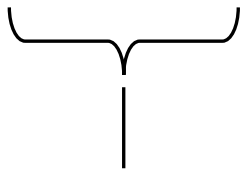
- Normal
- Short Sale

Order By

- Entry Date
- Contract Date
- Mutual Accept.
- Closing Date

Order Direction

- Descending
- Ascending



Transaction Actions



All Transactions Listed in One Place



Transaction Filter & Sorting Options

tcDocs | Transaction (1 of 3)

Transaction Summary Tasks Status Emails Text Agent

Transaction

JA(S) ANDREWS TO SMITH CLOSING 9/9/2016
12305 46TH AVE NE REDMOND WA 98053

Status*	Representation*	Short Sale?*
Open	Seller	No
MLS Number*	Title Number	Escrow Number
123456	22222222	22222222
Street Address		Add. 2nd Line
12305 46th Ave NE		
City	State	Zip
Redmond	WA	98053
Contract Date	Mutual Acceptance	Day Zero
07/31/2016	08/01/2016	if different than mutual
Closing Date	Closing Additional Info	Possession Date
09/09/2016	e.g. 'or sooner'	09/09/2016
Purchase Price \$	Buyer Credit	
1267000	\$5,000.00	
Earnest Money Deposit \$	Earnest Money Held By	
50000	Closing Agent	
Financing Type	Home Warranty Provider	
Conventional	Buyer's Agent	

“Green Menu Bar” – Allows Quick Navigation to Various Pages of the Transaction

Quick Transaction Creation via Copy

Transaction Attributes

tcDocs | Transaction (2 of 3)

Seller John Andrews Search... + x	Buyer Joe Smith Search... + x
Seller's Agent Johnny Agent Search... + x	Buyer's Agent Barbara Broker Search... + x
Seller's Co-Agent Search... +	Buyer's Co-Agent Search... +
Title Officer Mia Title Search... + x	Escrow Officer Ima Escrow Search... + x
Lender Cash Lender Search... + x	Appraiser Search... +
HOA Contact Search... +	Attorney Search... +

Transaction Participants –
Add as New or Search
for Existing

tcDocs | Transaction (3 of 3)

Notes for this Transaction

- 25% Referral Fee

Agent's General Notes/Preferences

These are Johnny Agent's transactions preferences and notes.

** Indicates required field*

Associate(s) Following Transaction Status

Search...




Additional
Transaction
Attributes

Add associates who wish
to Follow Transaction
Status (Will be emailed
along with Primary Agent)

tcDocs | Transaction | Summary

Transaction Summary Tasks Status Emails Text Agent



Transaction Summary

12305 46th Ave NE
Redmond, WA 98053
MLS #123456

CONTRACT INFORMATION		
Purchase Price: \$1,267,000.00	Contract Date: 7/31/2016	
Deposit: \$50,000.00 (Held by Closing Agent)	Mutual Acceptance: 8/1/2016	
Buyer Credit: \$5,000.00	Closing Date: 9/9/2016	
Financing Type: Conventional	Possession Date: On Closing	
Home Owner's Warranty Provider: Buyer's Agent		
SELLER(S): John Andrews	BUYER(S): Joe Smith	
Email: john.andrews@example.com	Email: jsmith@anything.com	
SELLER'S AGENT: Johnny Agent	BUYER'S AGENT: Barbara Broker	
Keller Williams Eastside 11109 Slater Ave NE, Ste 200A, Kirkland, WA 98033	Keller Williams Eastside 11109 Slater Ave NE, Ste 200A, Kirkland, WA 98033	
Direct: (111) 222-3333	Direct: (111) 222-3333	
Office: (999) 222-3333	Office: (999) 222-3333	
Fax: (111) 555-3333	Fax: (111) 555-3333	
Email: johnny@example.com	Email: barbara@example.com	
Notices: notices@kellerwilliamseastside.com	Notices: notices@kellerwilliamseastside.com	
TITLE		
Title #: 22222222	Title Company: Mia Title	Direct: 111-222-3333
	34 Title Place	Office: 999-222-3333
	Title, TC 99999	Fax: 777-222-3333
		Email: mia@example.com
ESCROW		
Escrow #: 22222222	Escrow Company: Ima Escrow	Direct: 111-222-3333
	555 Escrow Lane	Office: 999-222-3333
	Escrow, EC 99999	Fax: 777-222-3333
		Email: ima@example.com
LENDER		
Cash Lender:	Big Bank: 444 Financial Lane	Direct: 111-222-3333
	New York, NY 77777	Office: 999-222-3333
		Fax: 777-222-3333
		Email: cash@example.com
TRANSACTION COORDINATOR		
T.C. User for Johnny Agent:		Direct: 344-444-4444
		Fax: 444-444-4444
		Email: demo@tcdocs.com
KEY DATES		
Earnest Money to be Deposited		08/03/16
Neighborhood Review Notice Due		08/04/16
Seller to Deliver Seller Disclosure to Buyer		08/08/16
Seller to Deliver Utility Information to Buyer		08/08/16
Seller to Deliver HOA Documents to Buyer		08/11/16
Inspection Notice Due from Buyer		08/11/16
Finance Contingency Seller Right to Terminate		08/31/16

THIS REPORT IS PROVIDED FOR INFORMATIONAL PURPOSES ONLY. PLEASE REFER TO THE PURCHASE & SALE CONTRACT WHICH PROVIDES THE MOST ACCURATE & DETAILED EXPLANATION OF THE TERMS & DATES CONTAINED WITHIN.
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Your Logo Here

Summary Features:

- Provides a PDF to distribute to all necessary transaction parties
- Instantly updated once any item within the transaction changes
- Contains editable links to buyers, sellers, associates and key dates

tcDocs | Transaction | Tasks

Transaction Summary **Tasks** Status Emails Text Agent

Transaction Tasks

JA(S) PETERS TO JAMES
123 MAIN STREET CITY ST 99999

CLOSING
12/22/2016

Search Tasks...

<input checked="" type="checkbox"/>	Type	Key	P/C	#	Description	Lvl	Driver	Days	Compl/Due	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			P	52	Inspection Notice Due from Buyer	+	MA	10	11/20/16
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			P&C	54	Confirm Appraisal has been Ordered	2	# 52	0	11/20/16
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			C	56	Change Listing Status to Pending	2	# 52	0	11/20/16
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			C	122	Confirm CO Detectors are Installed	2	# 52	0	11/20/16
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			C	57	Confirm Appraised at Value	3	# 54	4	11/28/16

Task Features:

- Tasks are imported into Transaction from Checklists
- Due dates are automatically calculated based on Mutual Acceptance and Closing dates
- Should Mutual or Closing dates change, dates automatically respond and update
- Tasks may be related to/driven by other tasks (via parent-children links) – see P/C column to the left
- Completion date of a parent task starts the clock ticking on its child tasks (for example a buyer inspection notice kicks-off the seller inspection response task)
- Tasks are completely sortable and searchable

tcDocs | Transaction | Status

Transaction Summary Tasks **Status** Emails Text Agent

Transaction Status

JA(S) PETERS TO JAMES
123 MAIN STREET CITY ST 99999

CLOSING
12/22/2016

< >>

From: T.C. User <sender@tcdocs.com>
To: Johnny Agent <johnny@example.com>
Cc: T.C. User <demo@tcdocs.com>
Reply To: T.C. User <demo@tcdocs.com>
Subject: Transaction Update: JA PETERS to James 123 Main Street City ST 99999 File #123456 MA 11/14/2016 Closing 12/22/2016

OUTSTANDING

- Obtain Updated Title (Verify PSA Legal & Property Address Matches)
- Order Home Warranty
- Earnest Money to be Deposited

TODAY

- Confirm Appraisal has been Ordered
- Change Listing Status to Pending
- Confirm CO Detectors are Installed

LOOK AHEAD

Form 22K Utility Information to Buyer	MON, 11/21
Form 17 Seller to Deliver to Buyer	MON, 11/21
Finance Contingency Loan Application	MON, 11/21
HOA Documents to be Delivered to Buyer	MON, 11/28
Form 22J - Lead Based Paint Notice Due	MON, 11/28
Seller's Request for Loan Information Begins	MON, 11/28
Form 21 Paragraph X Verification Deadline	MON, 11/28
Repair Follow Up & Obtain Receipts	MON, 12/12

Status Features:

- Provides a summary view of the Transaction's Tasks
- Children of incomplete tasks are not shown
- Status can be emailed to the representing agent from tcDocs to provide the current state of the Transaction
- Tasks listed are interactive - they are links and may be selected to modify or delete
- Jump to the previous or next transaction status quickly by using the arrow keys

tcDocs | Transaction | Emails

Transaction Summary Tasks Status **Emails** Text Agent

Transaction Email

LOAN APPLICATION (BUYER)

JA(S) ANDREWS TO SMITH
12305 46TH AVE NE REDMOND WA 98053

CLOSING
9/9/2016

Email Name*

LOAN APPLICATION (BUYER)

Code Lookup

Search...

To: Sam Seller <sam@example.com>, Sally Seller <sally@example.com>

Cc: Johnny Agent <johnny@example.com>

Bcc: T.C. User <demo@tcdocs.com>

Subject: Loan Application: Seller to Buyer 333 For Sale Lane Seattle WA 99999 #22222222

Ref Attach: File attachment reminder(s)...

Attached: Drop File(s) Here, or Click to Browse

[View Message](#)

Message: Hi Sam & Sally,
We know that you have already met with Cash Lender of Big Bank and have started the loan process. This is a courtesv reminder that after todav if you wish to change Lenders or

Email Features:

- Emails are imported into the Transaction from the Email Templates section of tcDocs
- Codes are automatically converted into values pertaining to current Transaction
- Application provides hundreds of codes quickly searchable and insert-able, ranging from email addresses to property address
- Fully supports attachments via drag-and-drop
- Message editor allows for plain text as well as HTML



BUYER	
[BUYER_FIRST_NAME]	'Joe'
[BUYER_FIRST_NAMES]	'Joe & Jane' or 'Joe' for single person
[BUYER_LAST_NAME]	'Smith' or 'ABC Company'
[BUYER_LAST_NAMES]	'Smith & Doe' or 'Smith' or 'ABC Company'
[BUYER_FULL_NAME]	'Joe & Jane Smith' or 'Joe Smith & Jane Doe'
[BUYER_FULL_NAME_REV]	'Smith, Joe & Jane' or 'Smith, Joe & Doe, Jane'
[BUYER_SALUTATION]	'Joe', 'Joe & Jane' or 'Sir or Madam' (for company)
[BUYER_FULL_ADDRESS]	'123 Anyroad Rd E, #111, Anycity, AS 99999'
[BUYER_FULL_ADDRESS_NC]	'123 Anyroad Rd E #111 Anycity AS 99999'
[BUYER_EMAIL]	'joe@domain.com'
[BUYER_EMAIL_NAME]	'Joe Smith <joe@domain.com>'
[BUYER_PHONE]	'111-222-3333'

tcDocs | Transaction | Texting

The screenshot displays the tcDocs interface for a transaction. The top navigation bar includes tabs for 'Transaction', 'Summary', 'Tasks', 'Status', 'Emails', and 'Text Agent'. The main content area shows a transaction record for 'JA(S) ANDREWS TO SMITH' at '12305 46TH AVE NE REDMOND WA 98053'. The status is 'Open' and the representation is 'Seller'. The MLS No. is '123456'. A 'Johnny Agent' popup window is overlaid on the transaction record, asking 'Do you want me to send the addendum out for signature?'. The popup has 'Close' and 'Clear' buttons, and a 'Send Text!' button with a mouse cursor hovering over it.

Texting Features:

- Need to ask your agent a quick question? You can do that right in tcDocs by sending them a text message!

tcDocs | Transactions | To Do List

TRANSACTIONS TASK LIST - 11/20/2016

Bob Agent

BA(S) JONES TO JOSEPH
999 1ST STREET CITY ST 99999

CLOSING (DP)
12/26/2016

OUTSTANDING

TASK A
TASK E

BA(B) SMITH TO JONES
234 8TH STREET CITY ST 99999

CLOSING
12/29/2016

OUTSTANDING

TASK D

TODAY

TASK E

Johnny Agent

JA(S) PETERS TO JAMES
123 MAIN STREET CITY ST 99999

CLOSING
12/22/2016

OUTSTANDING

Obtain Updated Title (Verify PSA Legal & Property Address Matches)
Order Home Warranty
Earnest Money to be Deposited

TODAY

Confirm Appraisal has been Ordered
Change Listing Status to Pending
Confirm CO Detectors are Installed

Daily To Do List:

- Ever wonder what you need to be doing today? Well tcDocs provides a summary sheet of all the tasks due today as well as those outstanding, for every transaction you are working!
- Like Tasks and Status, tasks here are interactive and changeable from this page
- List is printable and save-able as a PDF

tcDocs | Tools > Date Calculator

Date Calculator

Select Your State

California

Start Day (Day Zero)

02/08/2017

Duration (# of Days)

10

More Options ^

Count Weekends? <input checked="" type="radio"/> Yes <input type="radio"/> No	Count Holidays? <input checked="" type="radio"/> Yes <input type="radio"/> No	Allow Weekend Last Day? <input type="radio"/> Yes <input checked="" type="radio"/> No	Allow Holiday Last Day? <input type="radio"/> Yes <input checked="" type="radio"/> No
--------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------

Restore Options to State Defaults!

2/21/2017

Tools Features:

- Dates for Listing and Transaction tasks are calculated automatically using State specific rules, however for the occasional need of quick calcs a date calculator is provided