

From Contract to Close,
lots to get done!
And it must go smoothly!

Closing Plans

Plans setup

Action plans > Listing plans > Closing plans > Marketing report plans > Closing report plans

Closing plan name: Create new Copy Rename Delete

Closing services checklist: Sort chronologically

This is a default plan

Activity	Description	Days	From	Remin...	Drop off	Assigned to
To-do	Deposit/Put in trust account	1	After acceptance date	0		Current user
To-do	Appraisal/Order	2	After acceptance date	0		Current user
To-do	Notify MLS/Send in form	2	After acceptance date	0		Current user
To-do	Prelim. report/Call and order	2	After acceptance date	0		Current user
To-do	Credit report/Order	2	After acceptance date	0		Current user
To-do	Loan application/Delivered to lender	2	After acceptance date	0		Current user
To-do	Inspections/Order septic, pest, etc.	2	After acceptance date	0		Current user
To-do	Confirm zoning/Check utilities etc.	2	After acceptance date	0		Current user
To-do	Buyer/Lender/Appointment set	3	After acceptance date	0		Current user
To-do	Disclosure/Have form signed by buyer	3	After acceptance date	0		Current user
To-do	Employ confirm/Delivered to lender	3	After acceptance date	0		Current user
To-do	Credit report/Received	4	After acceptance date	0		Current user
To-do	Prelim. report/Check ownership/legal description	5	After acceptance date	0		Current user
To-do	Appraisal/Received	5	After acceptance date	0		Current user
To-do	Credit report/Sent to seller	5	After acceptance date	0		Current user
To-do	Prelim. report/Due on sale clauses	5	After acceptance date	0		Current user
To-do	Inspections/Completed	7	After acceptance date	0		Current user
To-do	Progress report/Check progress	7	After acceptance date	0		Current user
To-do	Loan commitment/inform buyer and seller	7	After acceptance date	0		Current user
To-do	Covenants/Copies to buyers	7	After acceptance date	0		Current user
To-do	Closing started/Closing instructions sent	10	After acceptance date	0		Current user
To-do	Progress report/Check progress	14	After acceptance date	0		Current user
To-do	Progress report/Check progress	21	After acceptance date	0		Current user
To-do	Progress report/Check progress	28	After acceptance date	0		Current user
To-do	Fire insurance/Order	28	After acceptance date	0		Current user
To-do	Closing funds/inform buyer of amounts	30	After acceptance date	0		Current user
To-do	Fire insurance/Deliver binder to lender	31	After acceptance date	0		Current user
To-do	Progress report/Check progress	35	After acceptance date	0		Current user
To-do	Progress report/Check progress	42	After acceptance date	0		Current user
To-do	Repairs/After loan approval	46	After acceptance date	0		Current user
To-do	Termite letter/Order if required	53	After acceptance date	0		Current user
To-do	Warranty/Order if required	53	After acceptance date	0		Current user

Close

Agents can save a custom-created Closing plan and build a library of different plans for use in a variety of transactions.

Add the names, addresses, numbers and roles of all other parties in the transaction to the Closing parties section of a closing record.

When followed, these plans guarantee that you as sellers will be provided with first class closing service!

Buyers

More

Stress

Closing Plan for House Seller and Buyer Side

Activity	Description	Day	From	Reminder	Drop off	Assigned to
To-do	Obtain copy of completed contract	0	After acceptan...	0		Team Mike
To-do	Create Closing in Top Producer	0	After acceptan...	0		Team Mike
To-do	Make copy of earnest money/Place mo...	0	After acceptan...	0		Team Mike
To-do	Prepare Closing folder w names and a...	0	After acceptan...	0		Team Mike
To-do	Run/copy Property card and plat for fol...	0	After acceptan...	0		Team Mike
To-do	Is Dual Agency needed? #28 on Contr...	0	After acceptan...	0		Team Mike
To-do	Fill out sales checklist completely	0	After acceptan...	0		Team Mike
To-do	File Contract of Sale (310) in folder	0	After acceptan...	0		Team Mike
To-do	Update Contact Types in Top Producer	0	After acceptan...	0		Team Mike
To-do	Change to Pending in Upstate MLS	1	After acceptan...	0		Team Mike
To-do	Prepare Buyer's Estimate (optional)	1	After acceptan...	0		Team Mike
To-do	Add/Edit info on Mike's Phone List	1	After acceptan...	0		Team Mike
To-do	Change to Pending in Greenville MLS	1	After acceptan...	0		Team Mike
To-do	Change to Pending on ERATopGunsR...	1	After acceptan...	0		Team Mike
To-do	File Pending Upstate MLS in folder	1	After acceptan...	0		Team Mike
To-do	Is Referral due to another agent?	1	After acceptan...	0		Team Mike
To-do	File Pending G'ville MLS in folder	1	After acceptan...	0		Team Mike
To-do	Update Lead Router w Sales Contract ...	1	After acceptan...	0		Team Mike
To-do	Change to Pending on MikeRoachOnli...	1	After acceptan...	0		Team Mike
To-do	File Buyer Agency in closing folder if pr...	1	After acceptan...	0		Team Mike
To-do	File Pending WNC MLS in folder	1	After acceptan...	0		Team Mike
To-do	Change to Pending in WNC MLS	1	After acceptan...	0		Team Mike
To-do	Copy of completed contract to all parties	2	After acceptan...	0		Team Mike
To-do	Confirm Zoning	2	After acceptan...	0		Team Mike
To-do	Get Lead Based Paint Disclosure signe...	2	After acceptan...	0		Team Mike
To-do	Sellers Disclosure signed by both parti...	2	After acceptan...	0		Team Mike
To-do	File Dual Agency in closing folder if pre...	4	After acceptan...	0		Team Mike
To-do	Covenants & Restrictions to buyers (if ...	4	After acceptan...	0		Team Mike
To-do	Order Home Inspection if necessary	5	After acceptan...	0		Team Mike
To-do	Get copies of completed contracts to b...	5	After acceptan...	0		Team Mike
To-do	Ask Buyer for closing attorney	5	After acceptan...	0		Team Mike
To-do	Has purchaser ordered Termite Letter?	6	After acceptan...	0		Team Mike
To-do	Closing Attorney/Paralegal on Sales C...	6	After acceptan...	0		Team Mike
To-do	Prepare Attorney Info Sheet	6	After acceptan...	0		Team Mike
To-do	Remind Buyer/Seller of closing times	7	After acceptan...	0		Team Mike
To-do	Copy of Home Inspection Report to seller	7	After acceptan...	0		Team Mike
To-do	Call lender for loan status	7	After acceptan...	0		Team Mike
To-do	Does attorney have copy of home warr...	7	After acceptan...	0		Team Mike
To-do	Contact DHEC @ Septic letter if neces...	8	After acceptan...	0		Current user
To-do	Obtain name/phone number of lender	8	After acceptan...	0		Team Mike
To-do	Submit Folder to be Scanned	8	After acceptan...	0		Team Mike
To-do	Order termite letter if required	8	After acceptan...	0		Team Mike
To-do	Order any other necessary inspections	8	After acceptan...	0		Team Mike

Closing Plan for House Seller and Buyer Side

Activity	Description	Day	From	Reminder	Drop off	Assigned to
To-do	Fax Attorney's info sheet to attorney	8	After acceptan...	0		Team Mike
To-do	Obtain Survey if required	10	After acceptan...	0		Team Mike
To-do	List of required repairs to seller	10	After acceptan...	0		Team Mike
To-do	Get copy of CL100 in closing folder	11	After acceptan...	0		Team Mike
To-do	Send copy of Home Warranty and cont...	12	After acceptan...	0		Team Mike
To-do	Notify all parties about date and time of...	15	After acceptan...	0		Team Mike
To-do	Are Addendum requirements being met?	20	After acceptan...	0		Team Mike
To-do	Are contingencies being met?	20	After acceptan...	0		Team Mike
To-do	Obtain contract extension if necessary	25	After acceptan...	0		Team Mike
To-do	Send list of property utilities to buyer	25	After acceptan...	0		Team Mike
To-do	Inspections/Repairs complete?	27	After acceptan...	0		Team Mike
To-do	Preliminary HUD statement to buyer	2	Before closing ...	0		Team Mike
To-do	Buyer check w closing attorney for amo...	2	Before closing ...	0		Team Mike
To-do	Schedule final walk-through with buyer	7	Before closing ...	0		Team Mike