



# Listing Transaction Checklist

Property Address:  
 Client:  
 Listing Date: 5/1/19  
 Listing Price:

Sale Price:  
 Pending Date: 5/15/19  
 Closing Date: 6/30/19  
 Buyers Agent:  
 Buyers Title / Attorney:  
 Sellers Title / Attorney:

- Corresponds with the LISTING DATE: Enter the number of days from the Listing Date this activity is due.
- Corresponds with the PENDING DATE: According to the Contract, enter the number of days from the contract pending/effective date the activity is due.
- Corresponds with the CLOSING DATE: Enter the number of days from the Closing Date this activity is due.

Phase	Day	Issue	Activity Description	Progress	Due	Completed	Notes
Pre-Listing	-5		Send Intro email to client (pref vendors), and Transactly invite		4/26/19		
Pre-Listing	-5		Verify client info, and check tax records		4/26/19		
Pre-Listing	-5		Finalize listing agreement		4/26/19		
Pre-Listing	-5		Obtain MLS Data Input Information		4/26/19		
Pre-Listing	-5		Obtain Sellers', Lead-based paint, and other disclosures		4/26/19		
Pre-Listing	-5		Send estimated net to seller w/ cost explanations		4/26/19		
Pre-Listing	-5		Add sellers to loop and any information you already know		4/26/19		
Pre-Listing	-5		Submit documents to brokerage compliance		4/26/19		
Pre-Listing	-5		Share docs with sellers in Transactly		4/26/19		
Pre-Listing	-5		Setup pre-listing tasks in Transactly		4/26/19		
Pre-Listing	-5		Send listing expectations email		4/26/19		
Pre-Listing	-5		Schedule Photos, and any pre-isting inspections or repairs		4/26/19		
Pre-Listing	-5		Notify sellers of date and time of photos		4/26/19		
Pre-Listing	-5		Add all items to calendar		4/26/19		
Live Listing	-	None	Mondays -Weekly update emails		WEEKLY		
Live Listing	0		List property in MLS		5/1/19		
Live Listing	0		Assign keybox		5/1/19		
Live Listing	0		Update showing instructions		5/1/19		
Live Listing	0		Upload Property disclosures		5/1/19		
Live Listing	0		Enter Transactly 'Make an Offer' URL		5/1/19		
Live Listing	0		Send Live Listing email to seller		5/1/19		
Live Listing	0		Submit any additional advertisements		5/1/19		
Live Listing	0		Submit any necessary MLS listing confirm files to brokerage		5/1/19		
Live Listing	0		Schedule any open houses		5/1/19		
Live Listing	1		Review Zillow and Realtor.com listings		5/2/19		
Live Listing	-		Execute listing agreement amendment as instructed		AS NEEDED		
Live Listing	-		Make changes to the MLS listing as instructed		AS NEEDED		
Under Contract	-	None	Mondays -Weekly update emails		WEEKLY		
Under Contract	0		Send SELLER congrats email with team intro		5/15/19		
Under Contract	0		Send AGENT congrats email with team intro (offer to dual)		5/15/19		
Under Contract	0		Change MLS to pending		5/15/19		
Under Contract	0		Review all documents for accuracy		5/15/19		
Under Contract	0		Retrieve missing docs/signatures as required		5/15/19		
Under Contract	0		Complete closing transmittal		5/15/19		
Under Contract	0		Order title and deliver closing transmittal		5/15/19		
Under Contract	0		Update closing timeline in Transactly		5/15/19		
Under Contract	1		Send closing timeline email to seller		5/16/19		
Under Contract	2		Order any required documents, warranties, inspections, etc.		5/17/19		
Under Contract	3		Confirm receipt of earnest money		5/18/19		
Under Contract	3		Submit all files to brokerage compliance		5/18/19		
Under Contract	10		Verify Appraisal has been ordered		5/25/19		
Under Contract	20		Verify appraisal has passed		6/4/19		
Under Contract	20		Verify all title work is complete		6/4/19		
Under Contract	30		Confirm buyer's lender clear to close		6/14/19		
Inspections	-	None	Mondays -Weekly update emails		WEEKLY		
Inspections	5		Confirm dates/times of inspection(s) with buyes agent		5/20/19		
Inspections	5		Send sellers inspection time email		5/20/19		
Inspections	10		Receive inspection reports and notice		5/25/19		
Inspections	10		Coordinate documents and signatures as required		5/25/19		
Inspections	12		Coordinate repair quotes and service		5/27/19		
Inspections	15		Update all parties on repairs		5/30/19		
Inspections	17		Receive repair receipts and documentation		6/1/19		
Inspections	17		Distribute repair receipts and documentation to all parties		6/1/19		
Pre Closing	-	None	Mondays -Weekly update emails		WEEKLY		
Pre Closing	-20		Confirm sellers' new address		6/10/19		
Pre Closing	-20		Coordinate quotes, and moving service		6/10/19		
Pre Closing	-20		Coordinate utility transfers, internet/cable/satellite		6/10/19		
Pre Closing	-7		Confirm closing times with agents and title		6/23/19		
Pre Closing	-7		Send final walkthrough & closing email to seller		6/23/19		
Pre Closing	-7		Order agent's thank you closing gift		6/23/19		
Pre Closing	-4		Receive / Distribute closing discosure and settlement statement		6/26/19		
Pre Closing	-4		Send Agent's CDA to title/attorney		6/26/19		
Pre Closing	-3		Ensure no addtl amendments are required with agents		6/27/19		
Post Closing	0		Confirm closing and funding		6/30/19		
Post Closing	0		Final milestone email to seller (feedback request)		6/30/19		
Post Closing	0		Congrats & thank you email to buyers agent (feedback request)		6/30/19		
Post Closing	0		Prepare tax letter and any closing requirements		6/30/19		
Post Closing	3		Submit final documents to brokerage compliance		7/3/19		
Post Closing	3		Close out file		7/3/19		

This Transaction Coordinator Checklist is a sample of the many items managed during a home sale transaction. Checklists like this example, can more efficiently be managed online, by using Transactly's application.

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