



Agent Training – March 6th, 2022

7:00pm via ZOOM

<https://sanjac.zoom.us/j/5974192401>

7:00pm

Introduction of New Agents



Yesenia Iniesta

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hablo español!



Liliana Garcia

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lilianag1024@gmail.com

hablo español!

Using Dotloop



- **Dotloop is FREE to you as a member of HAR, but when you set up your FREE account you have to go through the HAR website first, otherwise if you go directly to Dotloop.com it will think you are just an agent wanting to open a new subscription (pay) account. If you registered correctly there is no limit to how many loops/folders you can have**
- **You must create a new Loop/Folder for each transaction/property. If you have 2 separate transactions with the same address (purchase/sale or purchase/lease) you must create 2 separate Loops/Folders**
- **You must add me to each Loop/Folder and then you have to SHARE each file with me. If you don't do that, I won't be able to see the files**
- **Your Loop/Folder should have all of the contracts/forms/addenda and checklists uploaded into it. If we ever get audited or someone tries to sue us, your files are our proof of what we did (or did not do). Be thorough and upload and complete every file. Don't leave out documents and make sure they are completely filled out**

7:06pm

After logging in to MATRIX click on TRANSACTIONS and choose Dotloop in the dropdown menu

The screenshot shows the HAR.com Matrix dashboard. The top navigation bar includes the HAR.com logo, a search bar with the placeholder text "Enter shorthand or MLS#", and a user profile "Hello, David". The "Transactions" menu item is circled in red. Below the navigation bar, the dashboard is divided into several sections:

- News & Alerts:** A list of recent news items, including "Mar 3 - #MemberFocusMonday- Winter ...", "Feb 24 - New ShowingSmart Features", and "Feb 16 - Welcome to Matrix".
- My Favorite Searches:** A list of saved searches, including "LP-DP-PAS under \$200k", "Rental Homes within 15 minutes of St.And...", and "Susan Geary".
- Hot Sheets:** A list of property types, including "Single-Family", "Townhouse/Condo", "Lots", and "Multi-Family".
- HAR-Developed Showing Service:** A promotional banner for "Showing Smart" with the text "Get Started TODAY!" and the website "www.ShowingSmart.com".
- Market Watch:** A bar chart showing market statistics: New Listing (57), Back On Market (24), Price Decrease (23), Price Increase (22), Option Pending (80), Pending Continue to Show (13), Pending (231), Sold (81), and Coming Soon (18).
- Search:** A search form with fields for MLS Number, Price, Status, Street Number, Street Name, Street Type, Subdivision, Zip Code, City, Building SqFt, Bedrooms, and Bathrooms. A "Search" button is located at the bottom right of the form.
- Recent Portal Visitors:** A section indicating "You have no recent portal visitors."

7:07pm

dotloop

Welcome to Dotloop, Your HAR Member Benefit

Dotloop replaces your document management, eSignature, storage and compliance management systems with a single platform, while helping you streamline your business with real-time visibility into your transactions.

BROKERS **AGENTS**

Make sure your Dotloop looks like this

The screenshot displays the Dotloop interface. At the top left is the 'dot loop Premium' logo. Navigation icons for 'Loops', 'Tasks', 'People', and 'Templates' are in the top right. A dropdown menu shows the 'Default Profile' for 'HOUSTON ASSOCIATION OF REALTORS'. Below this, the 'Default Profile' header is circled in red. A search bar and filters are present. The main area shows a grid of real estate listings, each with an icon, address, type, creation date, and an 'Enter Closing' button.

dot loop Premium

Loops Tasks People Templates

Default Profile
HOUSTON ASSOCI...
▼

Default Profile
HOUSTON ASSOCIATION OF REALTORS®

Activity Log Notifications 75 + Add Loop

Search by address, title, MLS#, etc. Filters (off) Sort: Creation date ▼

New

- 7341 Hinsdale Drive, Pasadena, TX, USA**
Type: None ▼
Created: 03/05/2022, 8:57 PM
Archive Enter Closing
- 3507 Cave Springs Drive, Houston, TX 77339**
Type: None ▼
Created: 03/05/2022, 12:45 PM
Archive Enter Closing
- 15318 Torry Pines Road, Houston TX 77062**
Type: None ▼
Created: 03/03/2022, 10:06 AM
Archive Enter Closing
- 2706 Cayden Creek Way, Conroe, TX 77304**
- 320 S 7th Street, La Porte, TX 77571**
- 2110 Wilcrest Dr, Houston, TX, USA**

Sample Contracts/Leases/Forms

If you need help filling in a contract, form, addenda or lease please use the SAMPLES provided on the AGENTS ONLY page on our website. If you have questions, ask me before you send it out to a client for signatures. Leases are particularly an issue and need to have specific terms, dates, \$ amounts and boxes checked

San Jacinto Properties

Agents Only Page

Agents, here you can find the company logos, policies and procedures, website links, forms & checklists, sample contracts and agent training links.

San Jacinto Properties Logos and Information	Real Estate Web Site Links	Forms/Checklists We Use
Company Logo BIG.jpg Company Logo MEDIUM.jpg Company Logo SMALL.jpg San Jacinto Properties Onboarding Information For New Agents POLICIES & PROCEDURES MANUAL  SanJacintoProperties.com	www.trec.texas.gov (TREC) www.texasrealestate.com (TAR) www.har.com (HAR) www.hcad.org (HCAD) ShowingTime.com https://ento.hud.gov/idapp/html/condlook.cfm FHA Condo Verification Site IRS Tax Website LoopNet Commercial MLS Mortgage 101 Website Zip Code Finder Map Area Code Finder 	ZipForms Most Used Forms Commission Disbursement Authorization Lead Based Paint Disclosure Booklet Buyer's Agency Form Buying a Home - What You Can Expect Buyer's Checklist Open House Manual Open House Sign In Open House Feedback  Listing Checklist MLS Listing Data Sheet Preparing Your Home To Sell Market Value Pyramid Seller Information for Title Company Seller's Additional Info to Buyer Selling Your Home - What You Can Expect Seller's Checklist Do I Have The Forms I Need - Checklist Lease Application Instructions Referral Form for Seller Referral Form for Buyer
SAMPLE CONTRACTS Information About Brokerage Services 1-4 Family Residential Contract Third Party Financing Addendum Amendment To Contract Residential Listing Agreement Seller's Disclosure Notice Termination of Contract Release of Earnest Money Seller's Invitation to Submit New Offer Seller's Temporary Lease Lead Based Paint Addendum HOA Addendum	Agent Training Videos Agent Training Slideshows Links to Helpful Articles https://www.har.com/education 10 Things You Should Do Every Week	

7:14pm

Property Management

We do offer Property Management Services for clients, however, at this time only Sylvia and myself are permitted to do Property Management.

If you have a client with a lease home that wants us to manage it, you must have them contact us directly to discuss the process, costs and requirements. DO NOT tell a client that we will manage their property without notifying us first and having the client talk to us in advance. Some landlords are not willing to follow our rules and/or the Texas Property Code and we therefore will not take on their property to manage. Some homes are in such bad shape that we cannot manage them unless the landlord makes numerous improvements to the home. If the landlord is not willing to make repairs and comply with the Texas Property Code, then we cannot accept them as a client

Keep in mind that all LEASE homes must meet certain safety criteria in order to be compliant with the Texas Property Code. If you are representing a client on a lease, make sure they understand what these safety features are. Every home that has tenants in it MUST MEET THIS CRITERIA (No Exceptions)

<https://youtu.be/MWGQTcB7SAQ> WATCH THIS 10 MINUTE VIDEO

7:18pm

Lease Listings and Commissions

Be sure you use TXR 1102 Residential Real Estate Listing Agreement – Exclusive Right to Lease

Remember to include any required disclosures and be sure the 1st month's rent is a FULL month's rent

Be sure that the home is in compliance with the Texas Property Code and has the required safety features (again, watch this <https://youtu.be/MWGQTcB7SAQ>)

Use [MySmartMove.com](https://www.mysmartmove.com) and [PetScreening.com](https://www.petscreening.com) to screen tenants and pets

Be careful not to discriminate against SERVICE ANIMALS but let PetScreening.com determine if they are legitimate service animals or not. Also, be sure to follow all Fair Housing Guidelines

We require the AGREEMENT BETWEEN BROKERS (TXR 2402) and a W-9 (IRS form) in order to pay agents from other brokerages their commission. Although the form is not required by TREC it is our way to ensure if the agent is legally sponsored by a broker and a member of the MLS or not. If you represent a tenant on a lease, you will be asked for the same documents in order to be paid a commission.

Remember that all commissions on leases must be paid by a Broker and to a Broker. It is not legal for any agent to be paid directly from another agent or another broker or by a landlord.

Yard Signs and Riders

If you don't have your own listing signs yet, here are some examples from your peers at San Jacinto Properties. If you are going to use the company signs, be sure you have riders attached to the sign with your name and phone number



Lockboxes

If you have “Borrowed” any of my lockboxes, please return them ASAP. My lockboxes are for temporary use only until you can purchase your own. The Supra iBox can be purchased at the HAR store in Clear Lake or at the main office on Hwy 59 across from Lakewood Church.

Remember that you **MUST** use Supra iBoxes on all occupied properties. Combination boxes can only be used for vacant homes that need to allow contractors in the house. Vacant homes that don't need repairs should use a Supra iBox



IBOX BT LE - SUPRA - ELECTRONIC LOCK BOX

ARTICLE CODE 800

\$129.00

HAR & HAR MLS MEMBERS ONLY-PICK UP ONLY 10-4 MON-FRI We'll call for Member Info & Locations. ID & Signature w/pick up. Electronic Box, Use w/Supra Phone App. Can change shackle code w/info in bag. NOTE: Box complete w/key container/shackle.

in stock Delivery time **Pick up only**

NEVER give out the combination to a lockbox to a buyer. This is a violation of the Code of Ethics and could cost you your license



LOCKBOX - PUSHBUTTON

ARTICLE CODE 64018

~~\$27.49~~ \$21.99

"Kikndle AccessPoint" (Formally Supra Brand) Heavy Duty. Holds up to 3 keys. There is no combination set on these when they leave the factory. Set 3 or more (non repeat) numbers. Instructions are included. Rubber protective jacket.

in stock

7:27pm

Commission Disbursement Authorization (CDA)

I have updated our CDA's as of March 4th, 2022 with new instructions to the Title Company concerning checks to the agents. **COMMUNICATE** with the Title Company. I do not want your checks sent to me.

_____ Broker Signature (TREC #469898)

Broker Check should be mailed to: 3222 Somerton Dr., La Porte, TX 77571

If not picked up at closing by the agent, the Agent Check should be mailed to:

When you are about 7 - 10 days away from closing you should go ahead and prepare the CDA and send it to the Title Company. There is no reason to wait any longer than that. Delaying the CDA can cause problems with the final calculations on the Closing Disclosure and could actually delay the closing itself. Fill out your CDA and get it to me well in advance of the closing date (at least 5 days)

If you are giving a REBATE to a client, it must be shown on the CDA and the Title Company and the lender both need a copy of the CDA at least 7-10 days in advance. The lender has to approve and rebate to a buyer and if they were not aware of it until the last minute, it could delay the closing or cause you not to be paid at closing.

7:28pm



San Jacinto Properties
(713) 894-9436
3222 Somerton Dr,
La Porte, TX. 77571
SanJacintoProperties.com

Name of closer at Title Co. & email

TO: →

email:

Your name and email

FROM: →

email:

PROPERTY ADDRESS:

BUYER:

SELLER:

Check the box for which client you represent

COMMISSION DISBURSEMENT AUTHORIZATION FORM

San Jacinto Properties represents the BUYER SELLER
In this transaction. Per the terms of the contract, MLS or Listing Agreement
our brokerage has earned a commission as indicated below

What is the Dollar Amount of the total commission

TOTAL COMMISSION: _____ . Please disburse the funds as follows

1. _____ to _____ (an agent with San Jacinto Properties)

Dollar Amount (5% of total) to Broker

2. _____ to David Turnquist (Broker)

If you are giving a REBATE to your client it must be disclosed here (\$ Amount and their name) and the lender must approve it at least 3 days before closing

3. _____ to the buyer _____ and shown on the Closing Disclosure as a disclosed "Realtor Contribution" credit towards closing costs
** Any amount not approved by the lender will be retained by the agent **

Broker Signature (TREC #469898)

Broker Check should be mailed to: 3222 Somerton Dr., La Porte, TX 77571

If not picked up at closing by the agent, the Agent Check should be mailed to:

You should be attending every closing and picking up your checks from the title company. If you cannot attend or pick up your check be sure you have communicated this to the title company in advance, I do not want your checks mailed to me.

David Turnquist
Broker



Dave@SanJacintoProperties.com

SanJacintoProperties.com

Modified March 2022

2022 Transactions

These are the CLOSED transactions I have posted for 2022 so far. If you have a closed transaction and it is not here, let me know tonight

Closing Date	Address	Agent Name	Sales Price
1/7/2022	1605 Bel Riposo Ln. (SALE)	Dave T.	\$327,000
1/14/2022	3627 Garrettsville Dr. (LEASE)	Sylvia S.	\$2,050
1/21/2022	3114 Chappelwood Dr. (SALE)	Kelly Y.	\$400,000
1/23/2022	3406 Glenhill Dr. (LEASE)	Sylvia S.	\$1,950
1/23/2022	23306 Briarstone Harbor Tr. (LEASE)	Weiye S.	\$2,300
1/25/2022	4622 Sunshine Dr. (SALE)	Weiye S.	\$308,000
1/26/2022	1105 Jackson Ave (SALE)	Alma H.	\$142,000
1/29/2022	16207 Brookvilla Dr. (LEASE)	Kelly Y.	\$2,300
1/30/2022	4622 Sunshine Dr. (LEASE)	Weiye S.	\$2,100
2/4/2022	1309 Cordell St. (SALE)	Dave T.	\$545,000
2/8/2022	10934 Rosewood Ct. (SALE)	Jerrice B.	\$254,000
2/16/2022	316 Clifton Crane (SALE)	Kelly Y.	\$445,000
2/25/2022	8243 Mandalay Bay Dr. (SALE)	Weiye S.	\$300,000
2/25/2022	15503 Sailpoint Ln. (SALE)	Jeremy E.	\$355,173



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Thanks for attending tonight's meeting. This slideshow and all the other Agent Training Slideshows we have done over the past 2 years are posted on the AGENTS ONLY webpage for you to review whenever you need to.