Business Support Services

BETTER SERVICES. BETTER OPTIONS.

Discover the value of more support.

Managing the paperwork and details of every transaction plus staying connected to your sphere, can make it tough to focus on clients and your production goals—much less take a day off. That's why we offer in-house transaction coordination (TC) services with the option for premium TC services. Or opt into our Business Assistant (BA) Program and/or our Database Services for an even greater level of support.

BASE TC SERVICES

Every agent has the essentials covered, from full-service listing processing to communication and status checks, signature reminders, plus closing file prep and delivery.

PREMIUM TC SERVICES

Free up more time with further assistance from a PorchLight TC, including under contract processing, title management and more. Available per transaction for a nominal fee.

BA PROGRAM

Want more comprehensive support? With this program, an experienced and licensed assistant will provide elevated, more proactive transaction services that are catered to your preferences.

DATABASE SERVICES

Any PorchLight agent can opt into our Database Services, where a dedicated staff member will help you manage your database, automate and streamline your marketing efforts, and grow your business.

Sell Side Business Support Services

TRIGGER EVENT / TASK	BASE TC	PREMIUM TC	BA	ESTIMATED RESPONSE TIMES* TC	BA
1. AFTER LISTING IS SUBMITTED					
Check listing agreement fully executed and enter expiration date in Connect2	✓	✓	✓		
Order O&E, Buildfax & moving box kit if applicable			✓		
Email seller intro email	✓ only if using listing services	✓	✓	2 – 6 hours	1 – 4 hours
Email seller to start gathering due diligence information			✓		
Email seller “Getting to Know You” and “Top 10 Things About Your Home” questionnaires as requested			✓		
Save PDC in Connect2	✓	✓	✓		
Check in CTM for disclosures; add wire fraud in docs management; send list to agent of items needed	✓				
Check in CTM for disclosures; prep any missing disclosures; upload to Connect2; add wire fraud in docs management		✓	✓		
Send disclosures to seller through CTM—SPD, SOW, WF, CI and LBP (based on agent preference)		✓	✓		
If agent prefers to handle disclosures themselves, email agent that docs and disclosures are prepped for review		✓	✓		
Check if there is a referral agreement—if so, upload doc	✓	✓	✓		
Request front photo from agent OR order photography for marketing and coming soon as needed			✓		
Order coming soon social media graphic (and 100 coming soon postcards if required) as requested			✓		
2. LISTING SERVICES CALENDAR					
Confirm dates with agent before emailing client LS calendar			✓		
Email seller LS calendar	✓	✓	✓		
Set up coming soon MLS based on agent preferences			✓		
3. FLOORPLAN FOLLOW-UP					
Receive floorplans, calculate square footage, send to ASC and agent and confirm square footage to use	✓ only forward	✓	✓		
Prep square footage disclosure with calculated measurements and SOW if applicable—send for seller signatures in CTM		✓	✓		
4. UPDATED LS CALENDAR					
Email seller updated LS calendar	✓	✓	✓		

These response times can only be met once we have all needed pertinent information to proceed.

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TRIGGER EVENT / TASK	BASE TC	PREMIUM TC	BA	ESTIMATED RESPONSE TIMES* TC	ESTIMATED RESPONSE TIMES* BA
5. MARKET DATE					
Begin MLS input, add MLS # to Connect2, email agent the MLS is started and to confirm list price		✓	✓		
Upload floorplan to MLS photos OR supplements		✓	✓		
Upload virtual tour and photos in MLS		✓	✓		
Update ShowingTime with showing instructions with property photo		✓	✓		
Check CTM for signed disclosures; upload to MLS supplements; request signatures		✓	✓		
Email active MLS report to agent	✓	✓	✓		
Make sure all listing documents are signed and uploaded into Connect2	✓	✓	✓		
AS NECESSARY					
Request for amend/extend		✓	✓	2 – 6 hours (done same day if received by 3pm)	1 – 4 hours (done same day if received by 4pm)
Listing price drop—update MLS, send out notice to trigger all marketing tasks		✓	✓	2 – 6 hours	2 – 4 hours
Upload documents to file	✓	✓	✓	Within 3 business days	Within 3 business days
Non CREC documents sent out for signatures		✓	✓	Within 2 business days (unless property is closing—agent should communicate urgency to TC)	Within 2 business days (unless property is closing—agent should communicate urgency to BA)
6. ACCEPTANCE					
Receive and approve UC submission	✓	✓	✓		
Check CTM for contract, counter, amendments—download all documents	✓	✓	✓		
Check deadline dates; update CTM status to under contract		✓	✓		
Create buyer folder in CTM; add names; share disclosures with buyer agent		✓	✓		
Update contacts in closing MLS information tab and eContact sheet and save PDF		✓	✓		
Update MLS status to under contract, upload to C2	✓ upload only	✓	✓		
Add dates to deadline tracker; upload contract, counter, amendments, disclosures; make notes in Connect2 for incomplete items, items sent for signatures, MB notes, etc.	✓	✓	✓		
If MEC dates, email agent calendar link from CTM with confirmation of converted deadlines		✓	✓		

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TRIGGER EVENT / TASK	BASE TC	PREMIUM TC	BA	ESTIMATED RESPONSE TIMES* TC	BA
Receive and review title commitment—note any mortgage payoff/liens/BK/ILC requirement; notify agent/client/title; request documentation needed and provide title info directly to client			✓		
Email client contract calendar, UC explanation/next steps docs & CTM calendar		✓	✓	2 – 6 hours	1 – 4 hours
Email title: order HOA docs and request special agency form for seller, send CDA, request commission to be wired	✓				
Email title: order title, HOA docs and request special agency form for seller, send CDA/Contact Sheet, contract docs, request commission to be wired		✓	✓		
Email buyer's agent: TC introduction, title info, and share disclosures		✓	✓		
Email client updated contract calendar & CTM calendar if necessary		✓	✓		
Review auto-populated dates in SSR (Sign & Staging Removal) order and email to PLS	✓	✓	✓		
Once SSR is scheduled, forward confirmation & schedule to agent	✓	✓	✓		
Receive showing notifications from ShowingTime for inspection and appraisal			✓		
Send agent Connect2 snapshot showing status of UC documents	✓	✓	✓		
7. UPDATED SSR (IF NECESSARY)					
Send updated SSR to PLS	✓	✓	✓		
8. EARNEST MONEY					
Upload earnest money receipt	✓	✓	✓		
Receive inspection schedule and add to calendar, send to client			✓		
Request due diligence (per the contract) from seller			✓		
Verify HOA docs ordered/received from title—upload and share in CTM (per agent preference)		✓	✓		
Send seller payoff request from title			✓		
9. INSPECTION OBJECTION					
Upload inspection objection and reports	✓	✓	✓		
Request ILC if required			✓		
10. INSPECTION RESOLUTION					
Upload inspection resolution or amend, check CTM for any other amends, signed disclosures and request missing signatures; if amends change dates, update both CTM and Connect2	✓ update C2 & request sigs only	✓	✓		
Email agent with Hub link to order post inspection gift (BA orders)		✓	✓		
If there is an amend offering credit, changing price, or concessions email to title		✓	✓		

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TRIGGER EVENT / TASK	BASE TC	PREMIUM TC	BA	ESTIMATED RESPONSE TIMES* TC	ESTIMATED RESPONSE TIMES* BA
Notify agent of appraisal date/time (scheduled through ShowingTime or email notification), request appraiser comp package from listing agent, forward to appraiser if requested			✓		
Request available closing times to schedule closing & confirm walkthrough; add to agent calendar as requested			✓		
If necessary, send U/C files to MB for review	✓	✓	✓		
Order just sold social media graphic			✓		
Order moving announcement social media graphic			✓		
Send agent Connect2 snapshot showing status of UC documents—include appraisal deadline reminder	✓ no reminder	✓	✓		
Get seller's forwarding address and order printed label sheet for buyer at closing as requested			✓		
11. 5 DAYS BEFORE CLOSING DATE					
Email agent confirming closing/date time and ask if client wants a reminder email; send link to order a closing gift, just sold graphic & moving announcements—OR BA orders all automatically (BA only)	✓ only confirm closing date	✓	✓		
Check CTM for missing documents/signatures, place CTM disclosures/docs in docs management from co-op agent via link in CTM, upload to Connect2	✓ only to confirm signatures	✓	✓		
Confirm Commission information in Connect2 is correct, send title updated CDA if necessary, email commission wire reminder & confirm wire instructions	✓	✓	✓		
Verify title has amends with credits, cash concessions or price changes		✓	✓		
If a referral, email W9 request to referring agent and forward to accounting, add referral agreement to file	✓ to PL agent only	✓	✓		
Request receipts for inspection items from seller—share with buyer agent and upload to file			✓		
Receive settlement statement—check commission amount matches CCF and CDA; verify title has amends with cash concessions, confirm commission concessions and credits are listed			✓		
Confirm receipts/home warranty or other payments are showing as applicable		by request only	✓		
Email client closing reminder, seller to-dos & important contacts		✓	✓		
Email social media review (check agent preferences for additional links and info)			✓		
Send agent Connect2 snapshot showing status of closing prep documents	✓	✓	✓		
Send closing form link—day before or morning of closing			✓		

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TRIGGER EVENT / TASK	BASE TC	PREMIUM TC	BA	ESTIMATED RESPONSE TIMES* TC	ESTIMATED RESPONSE TIMES* BA
12. CLOSING DATE					
Confirm receipt of wire; email accounting commission info	✓	✓	✓	2 – 6 hours†	1 – 4 hours†
Forward wire confirmation email to agent	✓	✓	✓		
Receive closing docs packet: check for signatures, request missing signatures	✓	✓	✓		
Transaction “Thank You” to all parties		✓	✓		
Change MLS to sold—upload to Connect2	✓ upload only	✓	✓		
Email Visutour—deactivate property tour & attach MLS sold sheet	✓	✓	✓		
Change CTM to sold, upload all documents to docs management per agent preference	✓ upload only	✓	✓		
Send closed files to MB for final review	✓	✓	✓		
Send agent final document status—confirmation file is processed, closed and complete	✓	✓	✓		
13. 7 DAYS AFTER CLOSING					
Email client copy of all documents	✓	✓	✓	within 5 – 7 business days of MB approval	
Update CRM, add marketing/follow-up plan reminders, remove housiversary for property if applicable			✓		
TERMINATED					
Receive notice to terminate and earnest release—send to seller for signatures; upload docs & terminate deal in Connect2	✓ update C2 only	✓	✓	3 – 6 hours	2 – 4 hours
Email title of status change		✓	✓		
Update MLS status after receiving approval from agent—upload to Connect2	✓ upload only	✓	✓		
Email notification of SSR withdrawal to PLS	✓	✓	✓		
Change status in CTM, remove calendar deadline (agent calendar/CTM); upload all docs from terminated file in CTM folder for terminated buyer		✓	✓		
Send MLS sheet, back on market info to ASC/agent	✓	✓	✓		
WITHDRAWN					
Email SSR to PLS	✓	✓	✓		
Change MLS status to withdrawn—upload to Connect2	✓ upload only	✓	✓		
Deactivate Visutour	✓	✓	✓		
EXPIRED					
Alert agent 7 days prior to expiration date to get extension or withdraw listing	✓	✓	✓		
Email SSR to PLS	✓	✓	✓		
Change MLS status—upload to Connect2	✓ upload only	✓	✓		
Deactivate Visutour	✓	✓	✓		

† If wire is different than CDA, additional time & research is required.

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Buy Side Business Support Services

TRIGGER EVENT	BASE TC	PREMIUM TC*	BA	ESTIMATED RESPONSE TIMES*	
TASK				TC	BA
1. NEW BUYER					
Verify buyer is in CRM or add to CRM			✓		
Prep or verify buyer agency is signed—if not, request signature			✓		
Create lead-based paint forms & packet in CTM		✓	✓		
Email buyer “Getting to Know You” questionnaire as requested			✓		
Assist in setting buyer showings as requested			✓		
2. AFTER CONTRACT IS SUBMITTED					
Check CTM for BA, contract, counter, amendments, disclosures; add wire fraud disclosure if not already uploaded; download all completed documents and upload to Connect2	✓	✓	✓		
Check deadline dates; update CTM status to under contract		✓	✓		
Update closing & MLS information, eContact sheet and save		✓	✓		
Pull U/C MLS report & PDC from MLS—upload to Connect2	✓	✓	✓		
Add dates to deadline tracker; make notes in Connect2 for incomplete items, items sent for signatures, MB notes, etc.	✓	✓	✓		
If MEC dates, email agent calendar link from CTM with confirmation of converted deadlines		✓	✓		
Email client contract calendar, UC explanation & CTM calendar		✓	✓	2 – 24 hours (contract will be processed within 1 business day, except new builds)	1 – 24 hours (contract will be processed within 1 business day, except new builds)
Email listing agent TC Introduction		✓	✓		
Email lender TC introduction and title info		✓	✓		
Email title CDA form and ask for EM receipt; request commission to be wired	✓	✓	✓		
Email client updated contract calendar & CTM calendar if necessary		✓	✓		
Send agent Connect2 snapshot showing status of UC documents	✓	✓	✓		
AS NECESSARY					
Request for amend/extend		✓	✓	2 – 6 hours (done same day if received by 3pm)	1 – 4 hours (done same day if received by 4pm)
Upload documents to file	✓	✓	✓	within 3 business days	within 3 business days
Non CREC documents sent out for signatures		✓	✓	within 2 business days (unless property is closing—agent should communicate urgency to TC)	within 2 business days (unless property is closing—agent should communicate urgency to TC)

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TRIGGER EVENT / TASK	BASE TC	PREMIUM TC*	BA	ESTIMATED RESPONSE TIMES* TC	ESTIMATED RESPONSE TIMES* BA
3. EARNEST MONEY					
Upload earnest money receipt	✓	✓	✓		
Send disclosures to buyer with explanation and request signatures in CTM		✓	✓		
Receive inspection schedule and add to agent calendar			✓		
Request HOA and due diligence docs from listing agent		✓	✓		
Receive and share HOA docs (or verify buyer has received)			✓		
4. INSPECTION OBJECTION					
Upload inspection objection and reports	✓	✓	✓		
Receive and review title commitment—note any mortgage payoff/liens/BK/ILC requirements; notify agent/client/title; request documentation needed and provide title info directly to client			✓		
Request ILC if required			✓		
5. INSPECTION RESOLUTION					
Upload inspection resolution or amend, check CTM for any other amends, signed disclosures and request missing signatures; if amends change dates, update both CTM and Connect2	✓ update C2 only	✓	✓		
Upload any amends or new disclosures	✓	✓	✓		
Email agent asking if they want a post inspection gift with Hub link (BA orders when requested)		✓	✓		
Email lender appraisal status update		✓	✓		
Get title availability for closing, email closing times and walkthrough reminder to schedule to agent and buyer			✓		
If necessary, send U/C files to MB for review	✓	✓	✓		
Send agent Connect2 snapshot showing status of UC documents—include appraisal deadline reminder	✓ no reminder	✓	✓		
6. APPRAISAL OBJECTION					
Confirm appraisal complete and copy received by buyer		✓	✓		
7. 5 DAYS BEFORE CLOSING					
Email agent confirming closing/date time and ask if client wants a reminder email; send link to order a closing gift, happy buyer graphic & moving announcements OR order standing closing gift per agent preferences (BA only)	✓ confirm closing date only	✓	✓		
Check CTM for missing documents/signatures, place CTM disclosures/docs in docs management from co-op agent via link in CTM, upload to Connect2	✓ only to confirm signatures	✓	✓		
Email agent to confirm scheduled walkthrough; add to calendar as needed			✓		
Confirm commission tab is correct, send title updated CDA if needed, email commission wire reminder & confirm wire instructions	✓	✓	✓		

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TRIGGER EVENT / TASK	BASE TC	PREMIUM TC*	BA	ESTIMATED RESPONSE TIMES* TC	BA
Verify title has amends with credits, cash concessions or price changes		✓	✓		
If a referral, email W9 request to referring agent and forward to accounting, add referral agreement to file	✓ to PL agent only	✓	✓		
Check CTM for inspection items receipts—if none, email request to listing agent; upload to file if received		✓	✓		
Collect inspection receipts and home warranty info; send copies to buyer & agent			✓		
Email client closing reminder & important contacts (if they don't want closing reminder, just email important contacts)		✓	✓		
Order happy buyer social media graphic			✓		
Order moving announcement social media graphic			✓		
Verify title has amends or resolution with cash concessions only			✓		
Receive settlement statement, confirm commission, concessions and credits			✓		
Email social media review (check agent preferences for additional links and info)		✓	✓		
Send agent Connect2 snapshot showing status of closing prep documents	✓	✓	✓		
Send closing form link—day before or morning of closing			✓		
8. CLOSING DATE					
Confirm receipt of wire, email accounting commission info	✓	✓	✓	2 – 6 hours†	1 – 4 hours†
Forward wire confirmation email to agent—ask for any remaining closing docs	✓	✓	✓		
Receive closing docs packet: check for signatures, request missing signatures	✓	✓	✓		
Upload MLS sold sheet to Connect2	✓	✓	✓		
Change CTM to sold, upload all documents to docs management per agent preference	✓ upload only	✓	✓		
Email transaction "Thank You" to all parties		✓	✓		
Send closed files to MB for final review	✓	✓	✓		
Add housiversary to Google calendar per agent preference			✓		
Send agent final document status—confirmation file is processed, closed and complete	✓	✓	✓		

† If wire is different than CDA, additional time & research is required.

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TRIGGER EVENT / TASK	BASE TC	PREMIUM TC*	BA	ESTIMATED RESPONSE TIMES* TC	BA
9. 7 DAYS AFTER CLOSING					
Email client copy of all documents	✓	✓	✓	within 5 – 7 business days of approval by MB	within 5 – 7 business days of approval by MB
Check that buyer info is updated in CRM after closing—check birthday and housiversary are entered and "remind me" is checked for housiversary & follow-up automatic reminders (2 months, 6 months, 1 year & repeat annually for 5 years)			✓		
Set referral type if not set in CRM; start marketing plan as requested			✓		
Mail thank you/congrats card with personal note to client and listing agent, per agent preferences			✓		
Gathering & posting of client testimonials			✓		
TERMINATED					
Upload EM release and notice to terminate to Connect2	✓	✓	✓		
Email all parties the fully executed EM release and notice to terminate		✓	✓	within 1 business day	within 1 business day
Change status in CTM—per agent preference		✓	✓		

Database Business Support Services

TASK (ALL BASED ON AGENT PREFERENCE)	BASE DATABASE SERVICES	PREMIUM DATABASE SERVICES
Monthly customized lifestyle PCPs automatically emailed	✓	✓
Monthly market-related PCPs automatically sent	✓	✓
Monthly Denver/Boulder macro market stats PCPs automatically emailed	✓	✓
Monthly PL Newsletter automatically emailed (if agent has subscribed to service—creation of newsletter additional $75/month)	✓	✓
Quarterly personal notes** (digitally reproduced)—up to 75 per quarter	✓	✓
Quarterly ordering of Generator gifts & creation of routing map	✓	✓
Neighborhood statistics set-up as needed	✓	✓
RealScout property searches & market activity reports: set-up coaching	✓	✓
Automatic Housiversary gifts: set-up & maintenance	✓	✓
Birthday cards sent** (digitally reproduced)	✓	✓
Preparing PL semi-custom social graphics: Just Listed, Just Sold, Happy Buyer, etc.	✓	✓
Monthly reporting: digest of all database services	✓	✓
Quarterly handwritten personal notes**—up to 75 per quarter (1 week turnaround)		✓
Annual preparing, printing & mailing of settlement statements**		✓

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Business Support Services Pricing*

TRANSACTION SERVICES	COMMISSION PLAN		
	BASECAMP	PARTNER/RELATED TEAM/ EXECUTIVE	UMBRELLA
BASE TC SERVICES	–	INCLUDED	–
PREMIUM TC SERVICES	INCLUDED**	$350/transaction	INCLUDED
BA SERVICES	not available to Basecamp agents	$500/transaction***	$300/transaction

DATABASE SERVICES	
DATABASE ON-BOARDING	*one-on-one assistance with sorting & qualifying; set up preferences* 0 – 2 hours: included for agents enrolled in Database Services additional hours: $50/hour
BASE DATABASE SERVICES	database under 250: $200/month database 250 – 400: $250/month database 401 – 550: $300/month
PREMIUM DATABASE SERVICES	database under 250: $250/month database 250 – 400: $300/month database 401 – 550: $350/month

** All services require a one-year commitment (agents can level up to a higher level of service at any time, but cannot decrease transaction service level or opt out of database services until their next commission anniversary date).*

*** Premium TC services are included for all agents on the Basecamp Plan as long as they are paying the .36% Agent Resource Fee. Once they graduate to the .18% ARF, Premium TC Services will be billed at the rate of $300/transaction.*

**** Must have LTM production of at least $5M to qualify for BA Services.*

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