

SIRVA Relocation Preferred Broker Network

SIRVA-Team Agent Training



Modules



Module 1 – The SIRVA Partnership & SIRVA-Team Agent Role

Module 2 – Departure Services (APEX 2.0)

Module 3 – Destination Services

Module 4 – SIRVA-Sister Company Support

Module 5 – Performance and Quality Expectations

SIRVA Team-Agent Test

Destination Services

Module 3



APEX – Home Finding



Apex Benefits

- Beginning to end Home Finding process in APEX
- Improved efficiency; automation of paperwork
- Ability for broker/agent to enter updates at any time
- Increased ability for agent to interact with APEX system
- Alerts and reminders for incomplete tasks
- Increased conversion for Home Finding, SIRVA Mortgage and SIRVA Settlement

Assisting a SIRVA Transferee in their destination



SERVICE,

SERVICE,

SERVICE...

Destination Services – Home Finding



At the Time of the Referral...

- Your relocation department receives and accepts all home finding referral opportunities
- Assigns an Agent within (4) hours
- Relocation Department will be “updated” at certain points in Home Finding process through “APEX” system

Buyer Agency/Exclusive Right to Represent

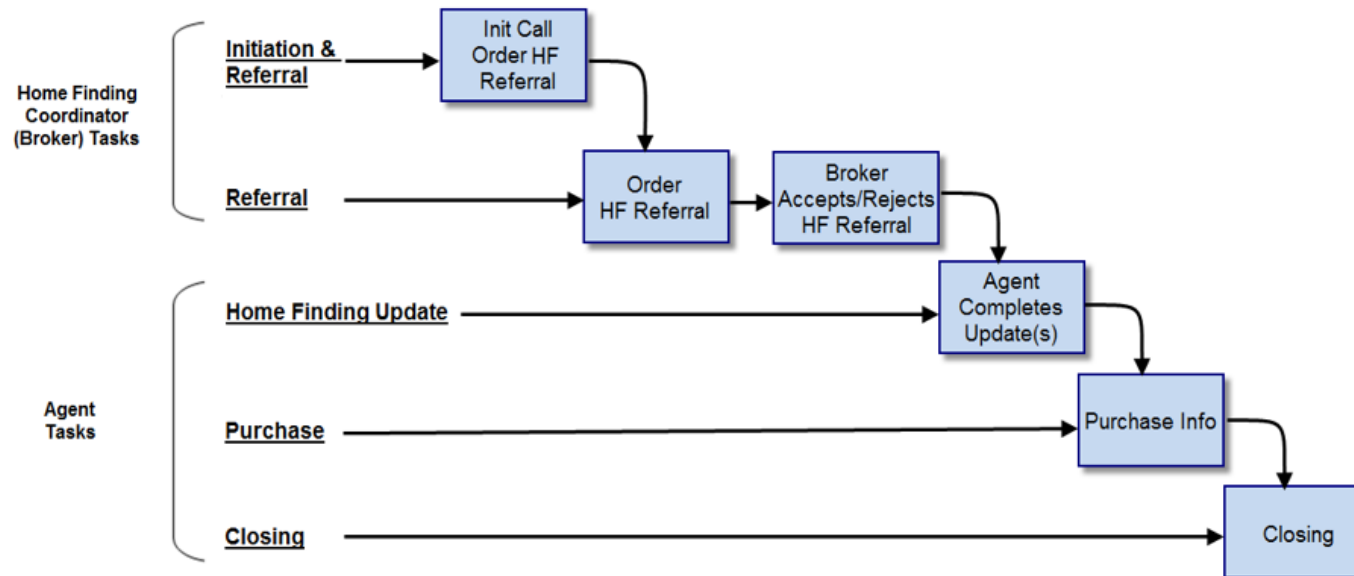


SIRVA supports Buyer Agency **ONLY** at the time of execution of a Purchase Agreement and **ONLY** for the duration of that offer.

SIRVA advises its Transferees on the following:

- **Not to sign an Exclusive Buyer Agency Agreement at the first home finding trip**
- **Not to sign an Agreement that links to agent's compensation, commission, costs or expenses**
- **If there is an Agreement signed, ensure there is the ability to cancel the Agreement at any time for any reason**

APEX Process



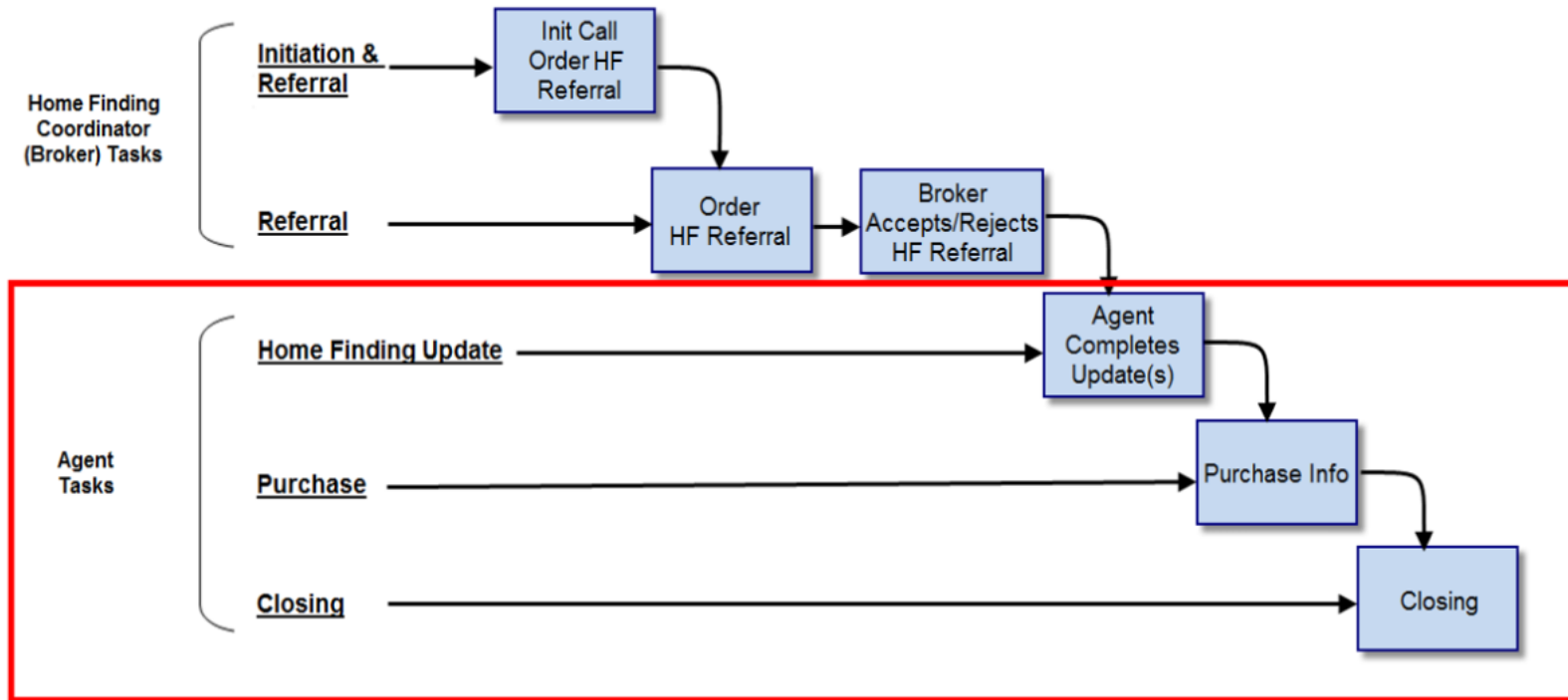
All referrals are placed through your Brokerage's Relocation Department or Broker

APEX Agent Tasks

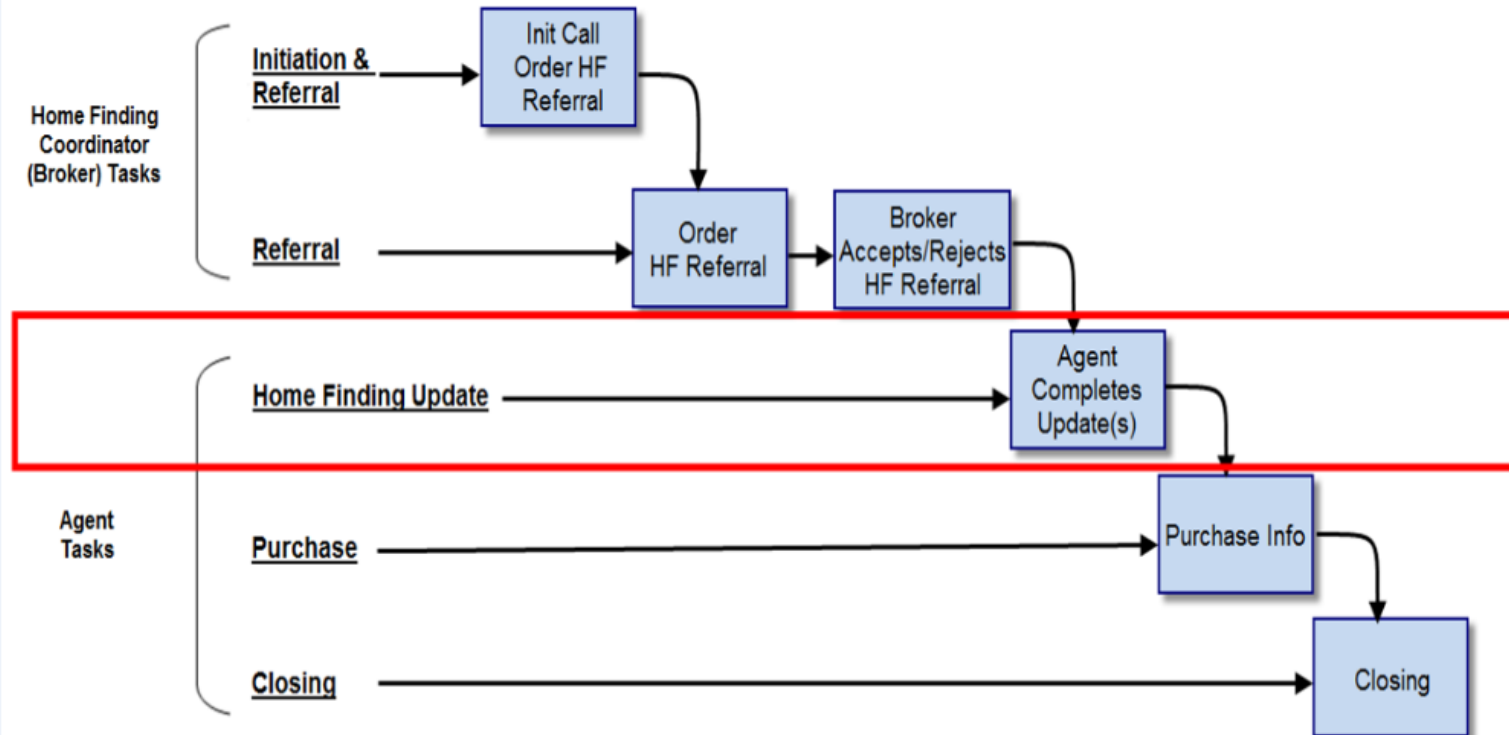


APEX Process – ‘Agent Tasks’

Agent tasks are broken down into three sections



APEX Process – ‘Home Finding Update’



Summary of Agent Tasks



Agent receives Home Finding referral task

Agent reads and acknowledges Agent instructions

Agent contacts Transferee

Agent acknowledges SIRVA Mortgage notification

Agent acknowledges Pre-Assigned Closing Office notification

Agent Notification of Referral

- All referrals are placed through your Brokerage's Relocation Department or Broker.
- You will receive this email after the referral has been assigned to you.
- Contact the Transferee per the instructions (in the red box).
- Note your contact at SIRVA for this assignment (as circled in red).
- **Click the link to access the APEX system.**



Dear Carol Abbott,

Congratulations - you have been selected for a Home Finding referral! Here is the referral information:

Transferee name: Sally Sample

Spouse / partner name: N/A

Location(s) of interest: Cleveland (44105), OH | Cleveland (44125), OH | Cleveland (44129), OH | Independence (44131), OH | Cleveland (44134), OH | Broadview Heights (44147), OH

Contact information: 763-525-3700

Home Finding order comments: No Data Available

Please click on the link below to log into the relocation portal - SIRVA's online system - and view SIRVA's instructions regarding this referral. Once you have done so, please contact the transferee or spouse / partner at your earliest opportunity to review their needs analysis. **Please note that all Home Finding data will need to be entered online into the relocation portal via the internet.**

Please contact Tester at or [undefined](#) if you have further questions.

If you encounter any technical difficulties, please email SIRVACSC@SIRVA.com or call 866-562-4594 & reference relocation ID # 96016.

We look forward to working with you!

Courtesy of SIRVA Relocation Notifications.

[Click to access Home Finding appt data entry / SIRVA Instructions](#)

Expectations when Contacting with Transferee

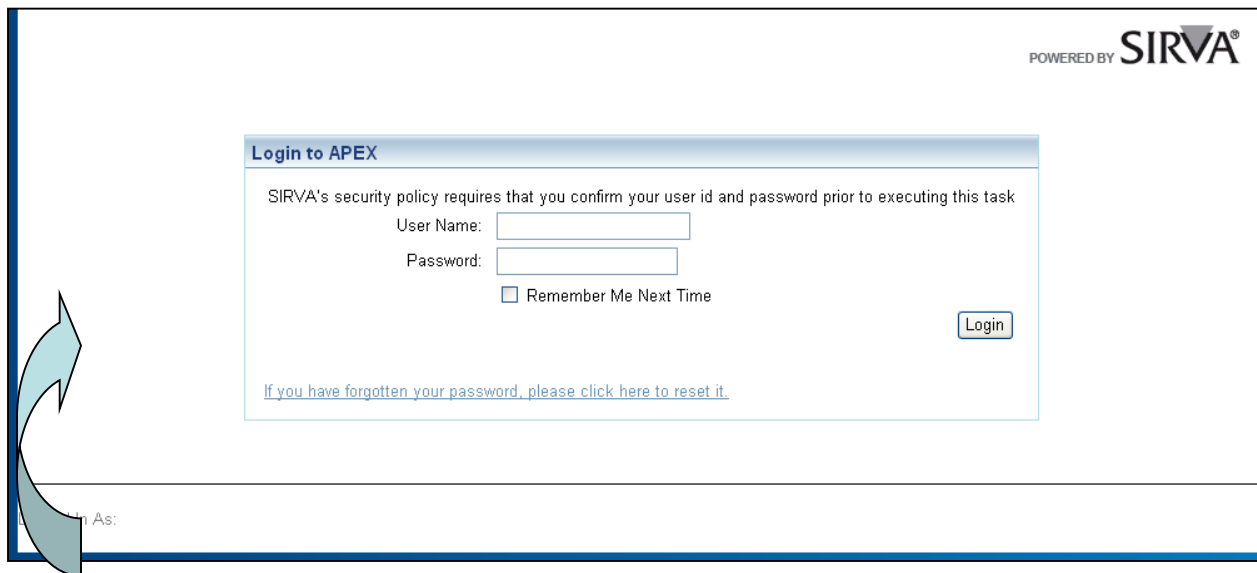


- Contact within 24 hours
- Confirm information received from SIRVA and, if necessary, conduct a preliminary needs assessment
- Please avoid being redundant regarding your assessment questions if you have been provided the information previously by either SIRVA or your Brokerage contact.
- Confirm timeframe for visit
- Establish expectations for visit
- Send listings or links ahead of time
- Follow up
- At all times be attentive and sensitive to the Transferees needs and inform SIRVA of any extenuating concerns

Log In Screen

The link will bring you to this log-in screen.

- Enter your user name and password (should have received this with first email welcoming you to the system)
- Your user name is your email address



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Login to APEX

SIRVA's security policy requires that you confirm your user id and password prior to executing this task

User Name:

Password:

☐ Remember Me Next Time

Login

[If you have forgotten your password, please click here to reset it.](#)

Note: If at any time you forget your password, click on this link to have it reset

Agent Portal – Any Task You Receive In Apex Starts Here

Welcome, abbott-mckown@howardhanna.com!

BMA Actions:
[Update BMA Appointment Date](#)
[Download BMA Forms](#)

Home Finding Actions:
[Enter Comments](#)
[Enter Purchase Information](#)
[The Home Finding Referral Fee Remittance Instructions](#)

Broker Guides:
[Completing the Broker Profile / Managing Agent Profiles](#)
[The BMA Referral Process](#)
[The Home Finding Referral Process](#)

Agent Guides:
[Completing a BMA Assignment](#)
[The Home Finding Process in APEX](#)

Administration:
[Change Password](#)
[Logout](#)

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Should you encounter a technical problem please call the SIRVA CSC at 866-562-4594 or send an email to: sirvacsc@sirva.com

Tasks (unassigned)	
Task Name ↑	Run Task

Inbox (your tasks)	
Task Name ↑	Run Task
Contact Sally Sample regarding Home Finding Referral / Relocation ID # 96016	Start Task ▶
Notification & Acknowledgement of SIRVA Mortgage for Sally Sample / Relocation ID # 96016	Start Task ▶

Last Update: 11/7/2013 4:36:33 PM

Home Finding Referral Task

Two Sections

Needs Analysis

Agent Instructions

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SIRVA®

Contact Sally Sample regarding Home Finding Referral / Relocation ID#96016

Transferee name: Sally Sample

Spouse/partner name: N/A

Origin property address: 123 Main Street, Plymouth, Minnesota 55447

APEX Relocation ID: 96016

APEX instance ID: 353976

Should you encounter a technical problem please call the SIRVA CSC at 866-562-4594 or send an email to: sirvacsc@sirva.com

Needs Analysis

Transferee Phone Number: 763-525-3700

Location(s) of Interest:

- CLEVELAND, OH 44125
- CLEVELAND, OH 44105
- INDEPENDENCE, OH 44131
- CLEVELAND, OH 44129
- BROADVIEW HEIGHTS, OH 44147
- CLEVELAND, OH 44134

Type of Home:

Type of Home: Single Family

Desired Age Range: 1 - 10 years

Minimum Price: \$175,000

Maximum Price: \$325,000

Community/Location:

Type of Location: Suburban

Orientation: Family

Desired Commute Time: 5

Are there any cultural needs: No

Other: Subdiv w/ Amenities

School/Education:

Information is needed on the following types of education: None

Special circumstances: None

Additional Comments:

None

Agent Instructions

In order to complete this task, first click the button below to read and acknowledge the agent instructions.

[Read and Acknowledge Agent Instructions](#)

Please note: At the completion of this task you will receive an e-mail that includes a copy of these instructions and the addendums referenced within. If for any reason you don't receive this e-mail, please immediately contact your SIRVA counselor.

If you have any questions or concerns, please contact Tester at ReloSysEmailTrackerDev@sirva.com.

[Logout](#) Logged In As: [abbott-mckown@howardhanna.com](#)

Needs Analysis

“Needs Analysis” section has been completed by transferee

Provides information regarding:

- Locations of interest
- Types of home desired (age, price)
- Community desired
- Schools/Education Information
- Additional comments

Needs Analysis

Transferee Phone Number: 763-525-3700

Location(s) of Interest:

- CLEVELAND, OH 44125
- CLEVELAND, OH 44105
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- CLEVELAND, OH 44129
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Information is needed on the following types of education: None

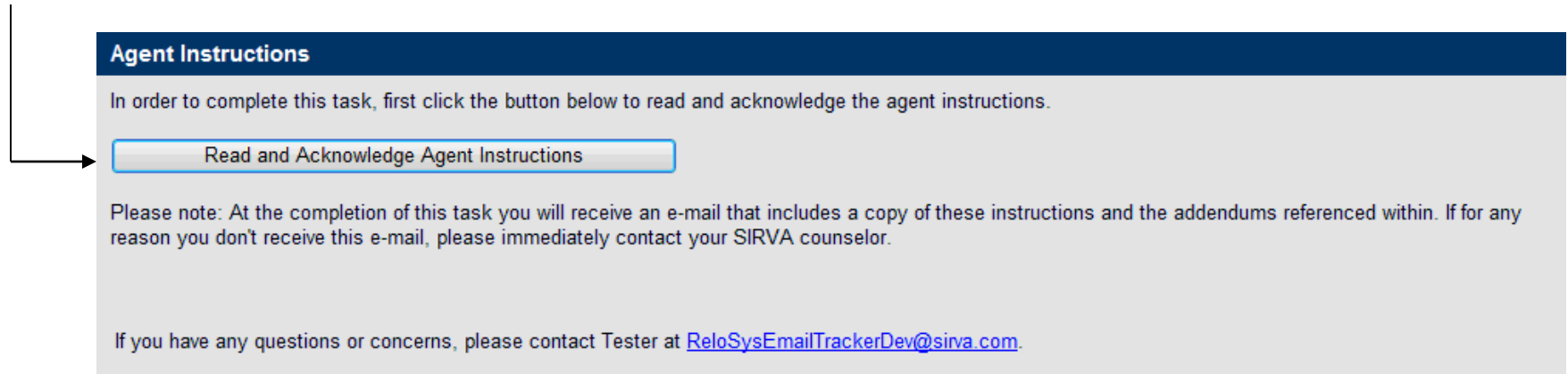
Special circumstances: None

Additional Comments:

None

Agent Instructions

After reviewing the Needs Analysis, click the 'Read and Acknowledge Agent Instructions' button



Agent Instructions

In order to complete this task, first click the button below to read and acknowledge the agent instructions.

[Read and Acknowledge Agent Instructions](#)

Please note: At the completion of this task you will receive an e-mail that includes a copy of these instructions and the addendums referenced within. If for any reason you don't receive this e-mail, please immediately contact your SIRVA counselor.

If you have any questions or concerns, please contact Tester at ReloSysEmailTrackerDev@sirva.com.

Review of Home Finding Purchase

Recommendations include information regarding:

- Buyer Agency
- Suggested contingencies for purchase contract (addendum will be received with confirmation email)
- Suggested inspections

NOTE: You will receive a copy of suggested informational guidelines referring to certain Relocation provisions that may become applicable.

Home Finding Agent Instructions

Home Finding Agent Instructions

Buyer Agency:

SIRVA supports Buyer Agency. Transferees are advised, however, to only enter into buyer agency agreements which are limited to the length of their house hunting trip, are not linked to a specific compensation, do not obligate the transferring employee to pay any commission, fees or other costs or expenses to the broker, and can be cancelled. If there are any questions, please provide a copy of the agreement to the SIRVA counselor for review.

Time of an Offer:

Once the transferee has decided on a specific property, provide the transferee with active and sold comps to help establish an offer amount. Once you have prepared the offer, if desired by the transferee and if time permits, please fax the proposed offer, the MLS fact sheet for the subject property, and all property disclosures to the SIRVA counselor.

The following contingencies are strongly recommended or required and should be included at the time of an offer.

- The property must appraise at or above agreed upon purchase price or buyer has the right to re-negotiate or cancel this purchase agreement and earnest money will be returned to the buyer.
- The offer is subject to a final "walk-through" inspection by buyer at least 24 hours before closing. Buyer to submit to Seller in writing any items not acceptable prior to closing (this protects both buyer & seller).
- New construction: In the event construction is not completed by contract closing date, builder/seller shall be liable for all expenses incurred by buyer and family from contract closing date until day of actual closing and possession. (At least try to obtain a per diem guarantee from the builder).

Note: SIRVA will provide an addendum that includes the above contingencies and can be used at the time of an offer.

Inspections: Certain inspections may be required. SIRVA recommends the following:

- **Whole House (General Home) Inspection:** Both new and existing homes.
- **Termites or Wood Boring Insects**
- **Radon Gas:** Must be below 4.0 pCi/L.
- **Septic, Well, and Water Tests (if applicable):** Septic, well and water potability test should be conducted by experts in these fields (General Home Inspectors may NOT be trained to conduct these tests). Potability tests should include nitrates, coliform, and any other contaminants. Note: FHA loans will require a lead test. A mechanical test is also recommended to ensure that the well is producing a proper flow rate.
- **Synthetic Stucco (EFIS):** Please be advised that several of our clients will/may not purchase a home from a transferee if it contains synthetic stucco (EFIS). **If the transferee is considering purchasing a home with synthetic stucco (EFIS), contact SIRVA immediately!** It is mandatory that we discuss the situation and possible consequences with the transferee prior to an offer being presented.

We also strongly suggest the following:

- Many contracts include a clause that binds the buyer's heirs and executors to the agreement. We recommend that this clause be deleted.
- Possession immediately upon closing.
- In the event of dispute of contract terms between Buyer and Seller, it is highly advisable that Buyer retain proper legal Counsel to review the contract prior to any closing in order to protect Buyer's best interests.
- To ensure that our transferee is getting the best service possible and the best pricing available, we would recommend the use of a SIRVA Settlement assigned closing office. (The contact information for this office will be sent to separately once it is assigned.) SIRVA has leverage its buyer volume to provide your buyer with competitive pricing for closing fees (i.e. escrow and attorney fees, does not include taxes or title insurance premiums) and we work with these offices on a regular basis to ensure that you and your buyer receive the highest quality service. To assist with the seller agreeing to the use of this closing office an addendum, Closing Agent Selection Agreement, will be provided to you. If signed and made a part of the purchase agreement it will confirm the use, by both buyer and seller, of our recommended closing office.
- Owner's Title Insurance Policy – **standard exceptions such as defects, liens, encumbrances, etc. need to be resolved.**

Accepted Offer:

Once an offer has been accepted you may enter purchase information through your portal by clicking the 'Enter Purchase Information' link on the left side, or contact your SIRVA counselor and they can initiate a task for you to enter the purchase information.

I acknowledge these instructions

**You must acknowledge
to move forward**

Review of Home Finding Purchase

Submit button appears after recommendations have been acknowledged

Agent Instructions

In order to complete this task, first click the button below to read and acknowledge the agent instructions.

Read and Acknowledge Agent Instructions

Please note: At the completion of this task you will receive an e-mail that includes a copy of these instructions and the addendums referenced within. If for any reason you don't receive this e-mail, please immediately contact your SIRVA counselor.

Submit

If you have any questions or concerns, please contact Tester at ReloSysEmailTrackerDev@sirva.com.

**CLICK HERE
to complete
task**



Reminder email will be sent at 24 and 48 hours if task is not completed. Broker will be contacted at 48 hours.

Agent Task Complete

This screen should then appear so that you know the task is completed



SIRVA Mortgage Acknowledgement

Welcome, abbott-mckown@howardhanna.com!

BMA Actions:
[Update BMA Appointment Date](#)
[Download BMA Forms](#)

Home Finding Actions:
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[Logout](#)

POWERED BY **SIRVA®**

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Tasks (unassigned)	
Task Name ↑	Run Task
Inbox (your tasks)	
Task Name ↑	Run Task
Contact Sally Sample regarding Home Finding Referral / Relocation ID # 96016	Start Task ▶
Notification & Acknowledgement of SIRVA Mortgage for Sally Sample / Relocation ID # 96016	Start Task ▶

Last Update: 11/7/2013 4:36:33 PM

SIRVA Mortgage Acknowledgement

Agent should support but not require the use of SIRVA Mortgage for this transaction

Acknowledge your understanding that SIRVA Mortgage should be supported by typing name and submitting



POWERED BY SIRVA®

Notification & Acknowledgement of SIRVA Mortgage for Jane Anderson / Relocation ID 37100

Transferee name: Jane Anderson Spouse/partner name: N/A Origin property address: 145 2nd Street, Plymouth, Minnesota 55447	APEX Relocation ID: 37100 APEX instance ID: 175605	Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com
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Notification

SIRVA Mortgage

- Special financing incentives
- Multi-lender products and pricing
- Relocation lending experts

For a no cost, no obligation mortgage pre-approval call 866-898-1213

Please note and acknowledge that SIRVA expects you to support the use of SIRVA Mortgage for this transaction. SIRVA Mortgage is familiar with relocation transactions and we appreciate your support of a seamless transaction for all parties. Although recommended and supported, RESPA prohibits the requirements of a particular lender as a condition of the transaction.

Acknowledgement

By typing in my name below, I acknowledge that I received and reviewed the above notification regarding SIRVA Mortgage.

Name:

If you have any questions or concerns, please contact Tester at ReloSysEmailTrackerDev@sirva.com.



If task is not completed within 24 hours of receipt, you will receive a reminder

Agent HF Referral Email – Recommendations

This email will be sent to you to complete the Home Finding Referral task. It will include a copy of the recommendations you acknowledged as well as the SIRVA Addenda that should be included when the Transferee completes a purchase contract.



Dear Carol Abbott,

Regarding Transferee: Sally Sample

Attached please find a copy of the Agent Instructions for your review. Addendums referenced in the instructions are also attached for your convenience.

If you have any questions or concerns, please contact Tester at or

Courtesy of SIRVA Relocation Notifications.

Pre-Assigned Closing Office Task

Within two days of referral, you will receive this email notifying you of the pre-assigned closing company for this transaction



Dear Carol Abbott,

A task has been sent to your portal to notify you of the Pre-Assigned Closing Office and have you acknowledge.

Please click on the link below to log into the relocation portal - SIRVA's online system - and complete the task to acknowledge the Pre-Assigned Closing Office.

Please contact Tester at or [undefined](#) if you have further questions.

If you encounter any technical difficulties, please email ITHelpDesk@sirva.com or call 1-800-999-5917, Option 1 & reference relocation ID # 37100.

Courtesy of SIRVA Relocation Notifications.

[Click here to log on to the relocation portal](#)

**Click the link
to access the
APEX system**



Pre-Assigned Closing Office Acknowledgement

Agent should support but not require the use of the pre-assigned closing office for this transaction

POWERED BY **SIRVA**

Notification & Acknowledgement of Pre-Assigned Closing Office for Jane Anderson / Relocation ID# 37100

Company name, address
and contact information
provided



Transferee name: Jane Anderson
Spouse/partner name: N/A
Origin property address: 145 2nd Street, Plymouth, Minnesota 55447

APEX Relocation ID: 37100
APEX instance ID: 175605

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

Notification

Company Name: ALPHA LAND TITLE AGENCY
Address: 4791 MUNSON ST. NW
City, State, Zip: CANTON, OH 44735
Phone: 330-490-2910
Fax: 330-490-2914
Contact Person: FRED J. HAUPT
Email: LAURA@ALPHALANDTITLE.COM

Please note and acknowledge that SIRVA Settlement has identified a pre-assigned closing company for this transaction. It is our expectation that you will support the use of this closing company for this transaction. At the time of the purchase, if the pre-assigned closing office is not utilized you will be required to provide a reason why the pre-assigned closing office was not utilized. The pre-assigned closing company is familiar with relocation transactions and we appreciate your support of a seamless transaction for all parties. Although recommended and supported, RESPA prohibits the requirement of a particular closing company as a condition of the transaction.

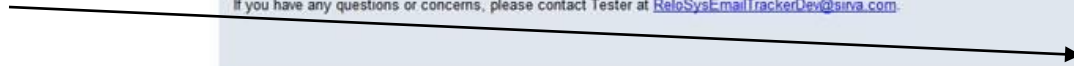
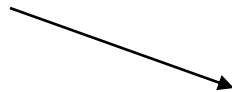
Acknowledgement

By typing in my name below, I acknowledge that I received and reviewed the above notification regarding the pre-assigned closing office.

Name:

If you have any questions or concerns, please contact Tester at ReloSysEmailTrackerDev@sirva.com.

Acknowledge your
understanding that pre-
assigned closing office
should be supported by
typing name and submitting



If task is not completed within
24 hours of receipt, you will
receive a reminder

SIRVA

Relocate Your Thinking

HF Update Email

You will receive the email below asking for an update on the Transferee's Home Finding process.



Dear Carol Abbott,

Please complete the task that has been sent to your portal to provide SIRVA with an update on the home finding referral for Sally Sample.

SIRVA requests that this task be completed in the next **48 calendar hours**.

If you have any questions or concerns, please contact Tester at or [undefined](#).

If you encounter any technical difficulties, please e-mail ITHelpDesk@sirva.com or call 1-800-999-5917, Option 1 & reference relocation ID # 96016.

[Click here to access Home Finding Update task](#)

Courtesy of SIRVA Relocation Notifications.

HF Update – 3 Questions to Complete

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SIRVA®

Complete Home Finding Update for Sally Sample / Relocation ID 96016

Transferee name: Sally Sample

Spouse/partner name: N/A

Origin property address: 123 Main Street, Plymouth, Minnesota 55447

APEX Relocation ID: 96016

APEX instance ID: 353976

Should you encounter a technical problem please call the SIRVA CSC at 866-562-4594 or send an email to: sirvacsc@sirva.com

Home Finding Update

When was the last time you were in touch with the transferee?

Is there a trip date scheduled? If so, when? ☐ Yes ☐ No

Has the transferee purchased? If not, what is the transferee's timeline for purchasing? ☐ Yes ☐ No

Additional Comments/Information/Details:

Cancel

Submit

[Logout](#) Logged In As: [abbott-mckown@howardhanna.com](#)

Please provide any available info in the 4 fields on the HF Update Task and click “Submit” when completed

HF Update OVERDUE

- You will receive the email task below if you do not complete the original HF Update task within 48 hours.
- Please complete the HF Update task ASAP if you receive this message



Dear Carol Abbott,

The task to provide SIRVA with a Home Finding update for Sally Sample has not yet been submitted and is now overdue. Please complete this task at your earliest convenience.

NOTE: Failure to complete your update **within 48 hours** could result in the cancellation of the referral opportunity.

If you have any questions or concerns, please contact Tester at or [undefined](#).

If you encounter any technical difficulties, please e-mail ITHelpDesk@sirva.com or call 1-800-999-5917, Option 1 & reference relocation ID # 96016.

Courtesy of SIRVA Relocation Notifications.

Destination Services – Home Finding

Reminders regarding initial meeting with Transferee...

- Agent provides written agenda to Transferee.
- Map of properties/MLS printouts.
- General Area Overview Information.
- Agent listens and should be a resource.
- “Meet and Exceed Expectations.”
- Follows up with Transferee and SIRVA.

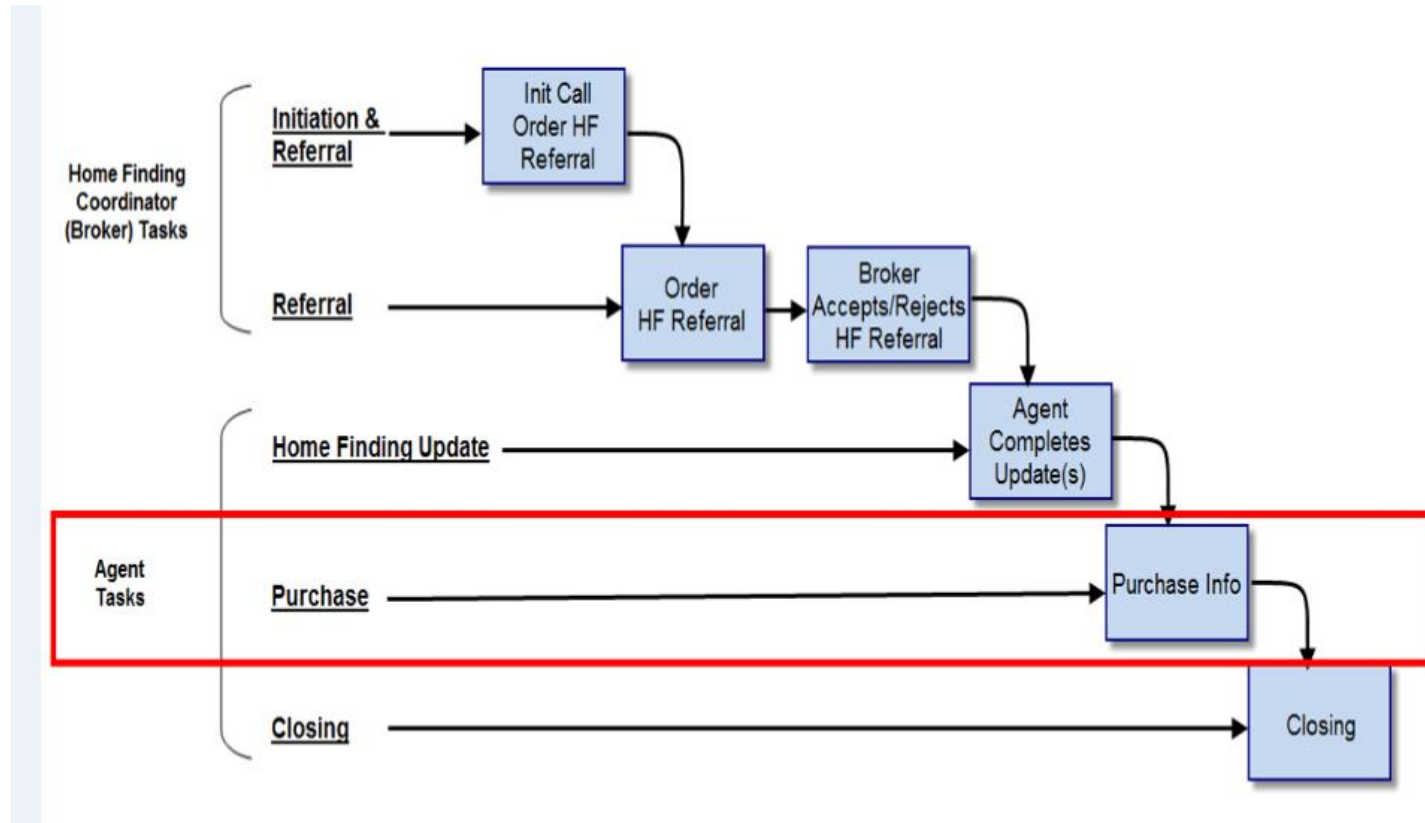
Destination Services – Home Finding



When the Transferee goes home without finding a suitable property:

- Debrief Transferee and solicit feedback.
- Update SIRVA with results of the trip (through APEX).
- Maintain contact with Transferee between trips.
- Inform Transferee of new listings that meet the Transferee's needs.
- Send articles, web links, or other market or area information to help the Transferee in their decision process.

APEX Process – ‘Purchase’



Destination Services – Home Finding

Once a home is identified, the Transferee should check their relocation policy for any eligibility requirements for future relocation resale.

Prior to the Transferee making an offer:

- Complete an analysis for the Transferee (HPE, CMA or BMA). Provide one copy to SIRVA and one copy to Transferee.
- SIRVA Addendum.
- Closing Agent Selection Addendum (CASA)-Refer to Module 2, Slide X.
- Home Finding Purchase Report (in APEX) / and notify SIRVA Counselor of completion.



After They Move In

- Be available as a resource to help Transferee orient to the area and help them get settled if requested.

Summary of Agent Tasks – Enter ‘Purchase’ Information in APEX



Enter Purchase Information

Agent enters information through APEX via the ‘Enter Purchase Information’ link under ‘Home Finding Actions’ noted on next slide.

OR

Agent receives task from Relocation Consultant (manually).

Enter Purchase Information

You can log into Apex and provide this info at any time – do not have to wait for a task to complete.

POWERED BY **SIRVA®**

Should you encounter a technical problem please call the SIRVA CSC at 866-562-4594 or send an email to: sirvacsc@sirva.com

Welcome, abbott-mckown@howardhanna.com!

BMA Actions:

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[Download BMA Forms](#)

Home Finding Actions:

[Enter Comments](#)
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[The Home Finding Referral Process](#)

Agent Guides:

[Completing a BMA Assignment](#)
[The Home Finding Process in APEX](#)

Administration:

[Change Password](#)
[Logout](#)

Tasks (unassigned)

Task Name ↑	Run Task
-------------	----------

Inbox (your tasks)

Task Name ↑	Run Task
-------------	----------

Notification & Acknowledgement of SIRVA Mortgage for Sally Sample / Relocation ID # 96016	Start Task ▶
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Complete Home Finding Update for Sally Sample Relocation # 96016	Start Task ▶
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Last Update: 11/7/2013 5:40:06 PM

Purchase Information Task

Whether you enter directly through APEX or receive a task from the Relocation Consultant, you will arrive at this screen.

Four sections to complete:

- Purchase Information
- Commission
- Referral Fees
- Purchase Agreement

Enter Purchase Information for Jane Anderson / Relocation ID#37100

Transferee name: Jane Anderson

APEX Relocation ID: 37100

Spouse/partner name: N/A

APEX instance ID: 175605

Origin property address: 145 2nd Street, Plymouth, Minnesota 55447

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

Once a purchase agreement has been finalized, please enter the purchase information below and provide a copy of the contract/addendums to SIRVA.

Purchase Information

Address 1: 963 Main Street

Address 2:

Address 3:

City: Independence

Country: United States of America

Zip Code: 44131

State: Ohio

Purchase Price: \$ 335,000

Purchase Date: 07/09/2010

List Price: \$ 350,000

Estimated Closing Date: 07/30/2010

Pre-Assigned Closing Office: ALPHA LAND TITLE AGENCY

Using Pre-Assigned Closing Office: ☒ Yes ☐ No

Commission

Rate: 6 %

Commission Split

List: 50 % Sell: 50 %

Referral Fee: 38%

Referral Fees

Calculated: \$3819.00

Actual: \$ 3819.00

Purchase Agreement

Uploading instructions:

- Make sure you have saved a fully executed copy of the full purchase agreement (addendums, etc.) to your computer in PDF, TIF, or JPG format. Click [Browse](#) below. You will see a window like [this](#) appear
- Locate the purchase agreement that you want to upload and click on it. The name that you give the purchase agreement should appear in the *File* name field.
- Click *Open*. The path and name of the file should appear in the box next to *Browse*.
- Click *Upload*. The purchase agreement will upload to SIRVA.
- Repeat these steps for each attachment you wish to send.
- Click *Save* once you have uploaded all of your attachments.

☐ I am not able to upload the contract.

Upload Purchase Agreement:

Browse...

Upload

Cancel

Submit

If you have any questions or concerns, please contact Tester at ReloSysEmailTrackerDev@sirva.com.

Enter Purchase Information

Enter Purchase Information for Jane Anderson / Relocation ID#37100

Transferee name: Jane Anderson
Spouse/partner name: N/A
Origin property address: 145 2nd Street, Plymouth, Minnesota 55447

APEX Relocation ID: 37100
APEX instance ID: 175605

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

Once a purchase agreement has been finalized, please enter the purchase information below and provide a copy of the contract/addendums to SIRVA.

Purchase Information

Address 1: 963 Main Street

Address 2:

Address 3:

City: Independence

Country: United States of America

Zip Code: 44131

State: Ohio

Purchase Price: \$ 335000

Purchase Date: 07/09/2010

List Price: \$ 350000

Estimated Closing Date: 07/30/2010

Pre-Assigned Closing Office: ALPHA LAND TITLE AGENCY

Using Pre-Assigned Closing Office: ☒ Yes ☐ No

Enter all address information, purchase price, list price, purchase date and estimated closing date

Pre-Assigned Closing Office information – You acknowledged previously, note if using pre-assigned office

Purchase Information

If not using pre-assigned Closing Office, please answer 'No'. If 'No', provide Closing Office that will be used, it's name and phone number. Select reason why pre-assigned Closing Office is not being used.

Pre-Assigned Closing Office:	ALPHA LAND TITLE AGENCY	
Using Pre-Assigned Closing Office:	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Closing Office Used:	First Title Company	
Closing Office Phone Number:	457-963-4563	
Why isn't the pre-assigned closing office being used?	<div>Please select...<ul style="list-style-type: none">Please select...Agent RefusalAttorney Review StateBuyer Select State - Seller RefusalNew ConstructionPricing Not CompetitiveSecondary Pre-Assigned Closing Office UtilizedSeller Select State - Seller RefusalShort Sale / Foreclosure / Bank Owned</div>	
Commission		
Rate: 6 %		Referral Fee: 38%

Commission/Referral Fee

- Enter Commission Rate and Split.
- Referral Fee % will be auto-calculated from the Referral Acknowledgement.
- If you enter a Referral Fee in the “Actual” field that is different than the calculated amount, you must provide a reason in the subsequent pop up box.

Commission				
Rate: <input type="text" value="6"/> %	Commission Split <table><tr><td>List: <input type="text" value="50"/> %</td><td>Sell: <input type="text" value="50"/> %</td></tr></table>	List: <input type="text" value="50"/> %	Sell: <input type="text" value="50"/> %	Referral Fee: 38%
List: <input type="text" value="50"/> %	Sell: <input type="text" value="50"/> %			

Referral Fees	
Calculated:	\$3819.00
Actual:	<input type="text" value="\$ 3819.00"/>

Purchase Agreement

Purchase Agreement

Uploading instructions:

- Make sure you have saved a fully executed copy of the full purchase agreement (addendums, etc.) to your computer in PDF, TIF, or JPG format. Click *Browse* below. You will see a window like [this](#) appear.
- Locate the purchase agreement that you want to upload and click on it. The name that you give the purchase agreement should appear in the *File* name field.
- Click *Open*. The path and name of the file should appear in the box next to *Browse*.
- Click *Upload*. The purchase agreement will upload to SIRVA.
- Repeat these steps for each attachment you wish to send.
- Click *Save* once you have uploaded all of your attachments.

☐ I am not able to upload the contract.

Upload Purchase Agreement:

If you have any questions or concerns, please contact Tester at ReloSysEmailTrackerDev@sirva.com.

**CLICK HERE to
complete task**

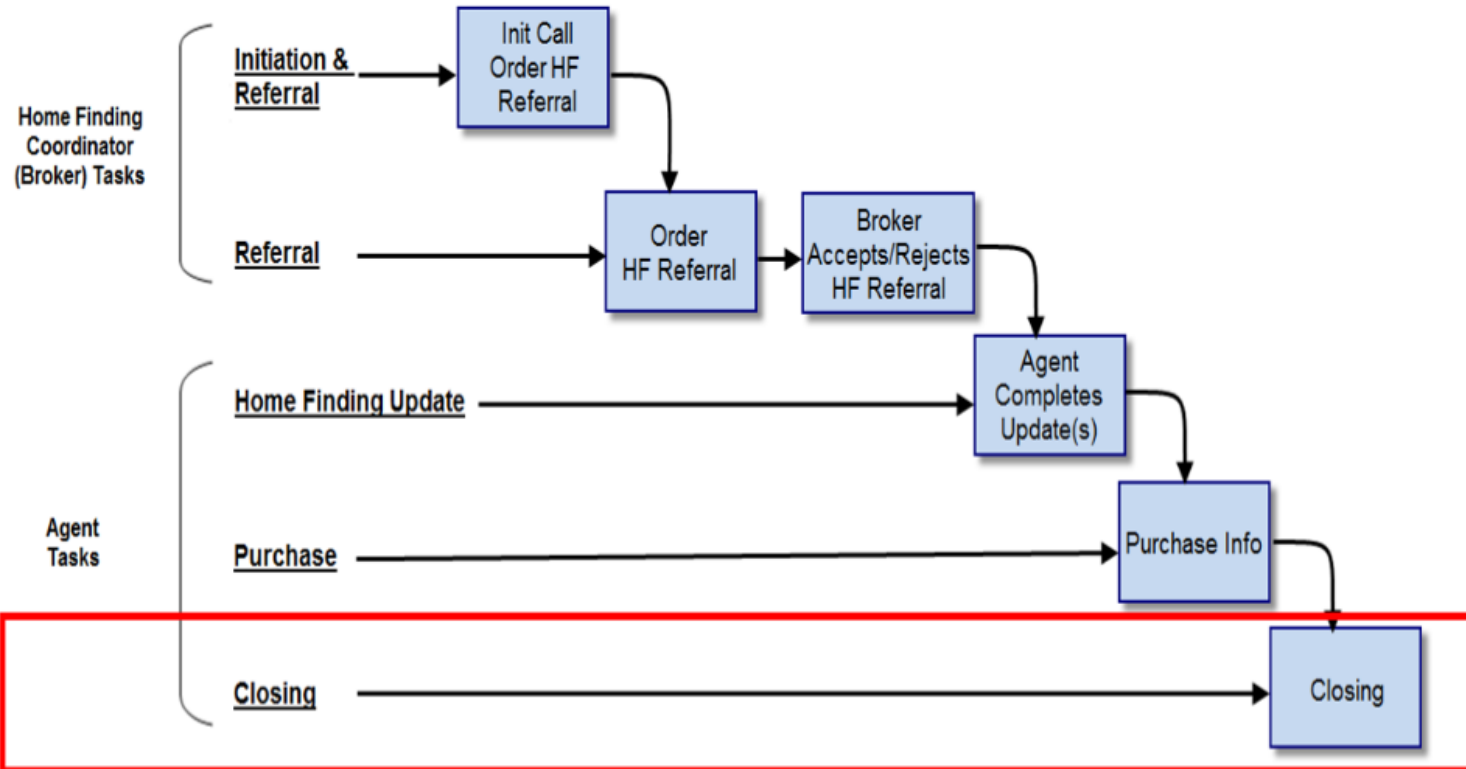
You must do one of two options:

- Upload Purchase Agreement.

OR

- Check the box next to 'I am not able to upload the contract'. You will need to enter a Reason why you're not able to upload in the subsequent pop-up box. Please e-mail the purchase agreement to the SIRVA Relocation Consultant if you are not able to upload.

APEX Process – ‘Closing’



Closing Confirmation Task Email to Agent

Nine days prior to the estimated close date, you will receive this email task to confirm or update the estimated closing date.



Dear Carol Abbott,

Jane Anderson's home purchase closing is approaching. A task has been sent to your portal to either confirm or update the estimated closing date and purchase price.

Please click on the link below to log into the relocation portal - SIRVA's online system - and complete the task to confirm the home purchase estimated closing date and purchase price.

Please contact Tester at or [undefined](#) if you have further questions.

If you encounter any technical difficulties, please email ITHelpDesk@sirva.com or call 1-800-999-5917, Option 1 & reference relocation ID # 37100.

Courtesy of SIRVA Relocation Notifications.

[Click here to log on to the relocation portal](#)

**Click the link to
access the
APEX system**



Confirm Estimated Closing Date/Purchase Price

You have two questions to answer and the ability to add any comments.

Estimated Close Date

Confirm Close Date has not changed

OR

If date has changed, enter new Close Date

Purchase Price

Confirm Purchase Price has not changed,

OR

If price has changed, enter new Purchase Price

POWERED BY **SIRVA**

Confirm Estimated Closing Date for Jane Anderson / Relocation ID#37100

Transferee name: Jane Anderson	APEX Relocation ID: 37100	Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com
Spouse/partner name: N/A	APEX instance ID: 175605	
Origin property address: 145 2nd Street, Plymouth, Minnesota 55447		

Confirm Estimated Closing Date & Purchase Price

Please confirm the accuracy of the estimated closing date and purchase price, or provide updates as appropriate.

Estimated Closing Date: 7/11/2010

☐ Confirm

☒ Make a change to the estimated closing date

Purchase Price: \$309,000.00

☐ Confirm

☒ Make a change to the purchase price

\$

Comments:

If you have any questions or concerns, please contact Tester at ReloSysEmailTrackerDev@sirva.com



If task is not completed within 8 hours of task receipt date, you will receive a reminder

Post-Closing: Actual Close Date and Purchase Price

Based on the estimated Close Date you provided, you will receive this email task to confirm or update the actual Closing Date.



Dear Carol Abbott,

A task has been sent to your portal for you to complete once the actual purchase closing occurs for Jane Anderson.

Please click on the link below to log into the relocation portal - SIRVA's online system - and complete the task to provide the actual home purchase closing date and confirm the purchase price.

Please contact Tester at or if you have further questions.

If you encounter any technical difficulties, please email ITHelpDesk@sirva.com or call 1-800-999-5917, Option 1 & reference relocation ID # 37100.

Courtesy of SIRVA Relocation Notifications.

[Click here to log on to the relocation portal](#)

**Click the link
to access the
APEX system**



Confirm Actual Closing Date/Purchase Price

You have two questions to answer and the ability to add any comments.

Actual Close Date

Confirm closing is complete and enter actual Close Date

(If closing did not occur, contact SIRVA Relocation Consultant)

Purchase Price

Confirm Purchase Price has not changed,

OR

If price has changed, enter new Purchase Price

Enter Actual Closing Date for Jane Anderson / Relocation ID# 37100

POWERED BY **SIRVA®**

Transferee name: Jane Anderson	APEX Relocation ID: 37100	Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com
Spouse/partner name: N/A	APEX instance ID: 175605	
Origin property address: 145 2nd Street, Plymouth, Minnesota 55447		

Confirm Closing Date and Purchase Price

After the actual closing has taken place, please complete this task by providing the actual closing date and confirming (or updating) the actual purchase price. If the actual closing is still pending please contact your SIRVA Associate to notify them of the delay. This task will remain in your portal until you are able to provide the actual closing date.

Estimated Closing Date: 7/8/2010

☒ Closing is complete

Actual Closing Date:

Purchase Price: \$309,000.00

☒ Confirm

☐ Update the purchase price

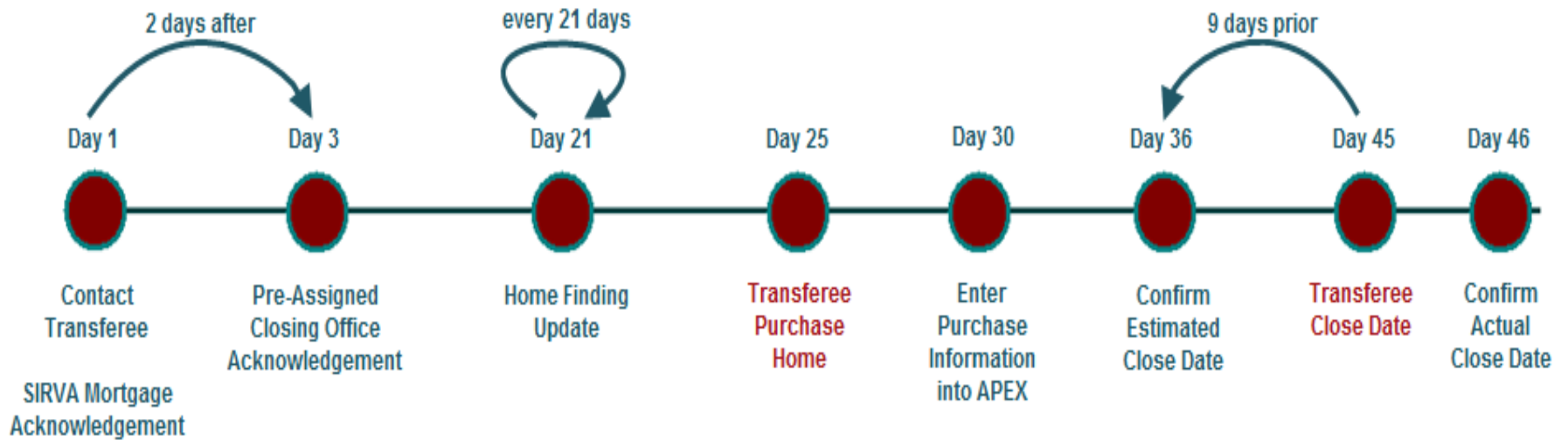
Comments:

If you have any questions or concerns, please contact Tester at ReloSysEmailTrackerDev@sirva.com



If task is not completed within 24 hours of task receipt date, you will receive a reminder

Sample Time Line



Notifications from SIRVA Relocation Consultant



You may receive an email with information regarding any of the following below notifications from a SIRVA Relocation Consultant: HF Update

- Referral is cancelled via an automated email
 - If Referral is cancelled, all tasks and reminders will also be cancelled

Enter Comments for Home Finding Update

Enter Comments

You will see all of your open transferee files – click the 'Enter Comments' button

Enter Comments		
Relocation ID	Transferee Name	Action
37101	Ken Larson	<input type="button" value="Enter Comments"/>
37100	Jane Anderson	<input type="button" value="Enter Comments"/>

Enter Comments for Ken Larson / Relocation ID#37101

Transferee name: Ken Larson	APEX Relocation ID: 37101	Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com
Spouse/partner name: N/A	APEX instance ID: 175612	
Origin property address: 789 7th Ave N, Plymouth, Minnesota 55447		
Enter Comments		
Any comments that you enter will be posted in SIRVA's Status Log. NOTE: Your comments will not be auto-sent to any recipients. If you need to speak with someone or if your comments require action please contact your SIRVA Relocation Associate directly.		
Service: <input type="button" value="Home Finding"/>		
Enter Comments: <div>Ken called and he is thinking that may have to change the dates of his HF trip to the following weekend and was just checking my availability; I told him that would still work for me.</div>		
<input type="button" value="Cancel"/> <input type="button" value="Submit"/>		

Enter Purchase Information

Enter Purchase Information

Enter Purchase Information		
Relocation ID	Transferee Name	Action
37101	Ken Larson	<input type="button" value="Enter Purchase Info"/>
37100	Jane Anderson	The HF service status is 'Purchased'.

You will then be brought to the 'Enter Purchase Info' screen

Agent Ratings – Completed by SIRVA Consultant

- Relocation Consultant will complete a “Home Finding Agent Rating” on every agent.
- The Agent will also be rated by every Transferee.
- The Agent will be assessed upon their responsiveness and professionalism.
- Rating Scale for each Section is (1 – 5), with 1 being the lowest possible score (5 = Excellent; 4 = Very Good; 3 = Good; 2 = Fair; 1 = Poor)
- Refer to the “Home Finding Agent Ratings – Reference Guide” for more information on what is considered for each section.

Important Notes



- If there is a Sale Fall-Thru, Agent does not have the ability to put into APEX – must contact SIRVA Relocation Consultant to process.
- Please notify the SIRVA Relocation Consultant of any issues that are resulting from a Sale Fall-Thru such as:
 - a) The Transferee has decided to opt out of the Relocation program
 - b) The Transferee cannot obtain earnest money deposit back
 - c) The Transferee is being threatened by Seller with legal action
 - d) The Transferee has successfully terminated the contract
 - e) The Transferee wishes to look for another property immediately

Please continue with Module 4 – SIRVA Sister-Company Support

