SkySlope Step by Step Process Guide

Compass
Agents

Pennsylvania
Workflow

SkySlope
2019

Contents

Create Listing File

1. Click **Create Listing**

2. The first few times you create a listing, you'll be introduced to Skye > click **Enter the Listing**

3. Enter the **property address** > select the best match from the Google map search results > click **Let's Go**

   Note: If the correct address does not populate, or if your file doesn't have an address > click **Switch to Manual Entry** > enter the address

4. Select the correct **type of listing** > click **Next Question**

   Note: The type of listing chosen will dictate the list of documents you're required to upload for that file type.

5. Enter the **list price** > click **Next Question**

6. Enter the **listing commission** and **sales commission**

   Note: The system will default to entering commission as a percentage, click **Switch to Flat Rate** to enter a dollar amount (if applicable).

7. If co-listing the file with another Compass agent > click **Add Co-Listing Agent** to share the file with the co-listing agent > click **Next Question**

8. Enter the **listing date** and the **expiration date** by using the calendar picker or follow the MM/DD/YYYY format > click **Next Question**

9. Enter the **year built** > click **Next Question**

10. Enter the **name(s)** for your **seller(s)** > click **Next Question**

    Note: if selling the property for a company > click **Switch to Company Seller**

11. Verify the summary of the information you've entered > click **Create my Listing**

Submit Listing Documentation

How to Upload Document(s)

1. Use the **magnifying glass** in the top right to locate the correct file
2. Use one of the following methods to upload the correct document(s)

Method 1: Property Email Address

1. **Copy** the property email address at the top of the file
2. Go to your personal email > locate the correct email with document(s) attached > select **forward**
3. **Paste** the property email address in the TO field
4. **Send**
5. The document(s) attached will upload to the **Documents** tab of the file

Method 2: Bulk Upload in Documents Tab

1. Click the **Documents** tab
2. Click **Upload Document**
3. **Select document(s)** from your computer that you need to upload
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Submit Listing Documentation

How to Attach Document(s) to Checklist

1. Use the **magnifying glass** in the top right to locate the correct file
2. Use one of the following methods to attach document(s) to the Checklist

Method 1: Attach from Checklist Tab

1. Click the **Checklist** tab
2. Click **Attach** to the right of the Checklist item you wish to attach
3. Click **Assign** to the right of the correct document

Method 3: Drag and drop in Documents Tab

1. Click the **Documents** tab
2. **Drag desired document(s)** and drop in document list
3. The document(s) will upload to the **Documents** tab of the file

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Method 2: Assign from Documents Tab

1. Click the **Documents** tab
2. **Check the box** to the left of the document you wish to assign
3. Click **Assign** at the top of the document list
4. **Select** the correct Checklist item you wish to assign to from the drop-down menu
5. Click **Assign**

Method 3: Split and Assign

1. Click the **Documents** tab
2. Click **Split** to the right of the correct document
3. Reference the **document preview** to the right
4. Enter the **document name** and the correct **page range**
5. Repeat steps above for all necessary documents
6. Click **Split and Assign** in the top right

Submit Corrected Documentation

1. After your Transactions Team has reviewed your file, they'll send a **SkySlope Checklist Reviewed** email including a status of each submitted Checklist item
2. Any checklist item with a status **Incomplete** needs to be corrected, and re-submitted

   Note: Incomplete Checklist items will have comment(s) to the right explaining why they have not been accepted.

How to Remove Incorrect Documents

1. Use the **magnifying glass** in the top right to locate the correct file
2. To the right of **Incomplete Checklist** item(s) > click the **X** to remove the incorrect document(s)

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Withdraw Listing

1. Use the **magnifying glass** in the top right to locate the correct file

2. Open the file > click **Withdraw Listing** at the top right

3. In the pop-up window, enter **reasons for withdrawal** > click **Withdraw Listing**

4. The file will now live in **Canceled Listings Pending Approval** until your Transactions Team reviews the file

5. Once reviewed, the file will live in **Canceled Contracts**

Convert Listing Status

1. When an offer is accepted on your listing > use the **magnifying glass** in the top right to locate the correct file

2. Click **Accepted Contract** at the top right of the Checklist tab

   Note: After clicking Accepted Contract, the file will convert from a listing file to a transaction file.

3. Complete the required **Transaction** information > click **Next** on the lower right

4. Complete the required **Contact** information > click **Submit** at the top right

5. Complete the required **Commission** information > click **Submit** at the top right

Create Transaction File

1. When an offer is accepted for your buyer > click **Create Transaction**
2. In the pop-up window, enter the **property address** > select the best match from the Google map search results
3. Complete the required **Transaction** information > click **Next** on the lower right
4. Complete the required **Contact** information > click **Submit** at the top right
5. Complete the required **Commission** information > click **Submit** at the top right

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