

# Norris & Stevens

INVESTMENT REAL ESTATE SERVICES

## MANAGED PROPERTY ROUTING SLIP

LANDLORD/SELLER \_\_\_\_\_

TENANT/BUYER \_\_\_\_\_

TRANSACTION NO. \_\_\_\_\_

AGENT(S) \_\_\_\_\_

| RECEIVED BY             | RESPONSIBILITIES                                                                                                                                                                                                                                                                                                                                                                                                                                                 | DATE | INITIALS |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|----------|
| TRANSACTION COORDINATOR | <input type="checkbox"/> Enter lease into Deals Database & assign deal number<br><input type="checkbox"/> Assign a transaction number<br><input type="checkbox"/> Review the commission calculations<br><input type="checkbox"/> Assemble the complete deal file (routing slip, deal form, lease abstract, invoice, executed lease, credit app, credit report). Confirm receipt of the deposit check.<br><input type="checkbox"/> Forward to Lease Administrator |      |          |
| LEASE ADMINISTRATOR     | <input type="checkbox"/> Input lease data into Skyline<br><input type="checkbox"/> Upload Lease into Skyline Images<br><input type="checkbox"/> Forward deal file and ledger for review/approval<br><input type="checkbox"/> For new tenants, issue Welcome Packet with COI, HVAC maintenance contract and utilities requests, if required                                                                                                                       |      |          |
| PROPERTY MANAGER        | Review the complete deal file (including fees)                                                                                                                                                                                                                                                                                                                                                                                                                   |      |          |
|                         | Review the occupant ledger                                                                                                                                                                                                                                                                                                                                                                                                                                       |      |          |
| DIR OF SALES & LEASING  | Review                                                                                                                                                                                                                                                                                                                                                                                                                                                           |      |          |
| PRINCIPAL BROKER        | Review                                                                                                                                                                                                                                                                                                                                                                                                                                                           |      |          |
| VP PROP MANAGEMENT      | Review                                                                                                                                                                                                                                                                                                                                                                                                                                                           |      |          |
| TRANSACTION COORDINATOR | <input type="checkbox"/> Save approved deal file to the server<br><input type="checkbox"/> Print and create physical file<br><input type="checkbox"/> Send final deal form and invoice to Corporate Accounting and broker(s)<br><input type="checkbox"/> Send final pdf to Lease Administrator                                                                                                                                                                   |      |          |
| LEASE ADMINISTRATOR     | <input type="checkbox"/> Print PDF of Approved Occupant Ledger<br><input type="checkbox"/> File Occupant Ledger with PM approval into Skyline<br><input type="checkbox"/> Create paper tenant file for new tenants or file paperwork for amendments into existing paper file                                                                                                                                                                                     |      |          |

**FILES EXPECTED TO BE COMPLETED THROUGH THE PROCESS WITHIN 3 BUSINESS DAYS**

**Notes:**

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## TRANSACTION FILE CHECKLIST

DATE SET UP \_\_\_\_\_

LEASE \_\_\_\_\_ SALE \_\_\_\_\_ OTHER \_\_\_\_\_

AGENT(S) \_\_\_\_\_

TRANSACTION NO. \_\_\_\_\_

|   | REQUIRED ITEMS                                                  | COMMENTS | PRINCIPAL<br>BROKER | DIR SALES +<br>LEASING |
|---|-----------------------------------------------------------------|----------|---------------------|------------------------|
| 1 | Legible copies of lease or earnest money offer (fully executed) |          |                     |                        |
| 2 | Closing Statement                                               |          |                     |                        |
| 3 | Agency Disclosure                                               |          |                     |                        |
| 4 | Listing Agreement/Fee Agreement                                 |          |                     |                        |
| 5 | Financials                                                      |          |                     |                        |
| 6 | Credit Report                                                   |          |                     |                        |
| 7 | Lease Abstract                                                  |          |                     |                        |
| 8 | Client Trust Funds                                              |          |                     |                        |
| 9 | Billing Instructions                                            |          |                     |                        |