

PROPOSED SELLER WORKFLOW

From the first meeting to a signed listing

Follow one property through the handoff. Each stage shows what the seller receives, what Synergy creates, and what Sid confirms.

Walk through the handoff 02
Possible Listing, signing and portal access

Follow a seller response 03
From a submitted form to Drive, a contract draft and Compass

Look up a folder or form 04+
Detailed workflow, 15-folder map and five seller forms

When does the seller get access?

Operations starts the record. Signing and Sid’s confirmation unlock the full seller workspace.

POSSIBLE LISTING

Sid opens the property in Operations.

Synergy creates the address folder and 15 subfolders in Daniel’s Drive. It creates the starter files and adds the main checklist inside the property. Sid resolves missing facts and the agent approves the packet.

Seller sees the listing packet, presentation and seller guide.

AGREEMENT RECEIVED

Sid checks the signed listing agreement.

Confirm the property and unit, signers, assigned agent, Drive folder and marketing instructions. When the checks pass, Sid moves the listing to Upcoming. An outstanding signature keeps the task open.

A dropped prospect stays in Synergy as a Past Possible Seller.

UPCOMING LISTING

The seller returns to the same private link.

Synergy moves the existing folder and activates the Agent and Marketing tasks. Sid checks the recipient and sends the prepared invitation in Compass.

Seller sees the five forms, the next action and the original meeting materials.

What happens after Submit?

Example from a seller questionnaire

> *“We replaced the roof in 2023. We’re taking the dining-room chandelier. Please call after five.”*

Synergy files the complete response

The dated Seller Questionnaire Responses.pdf goes in 03 Listing Presentation Documents. Sid can open it from the property checklist. Each answer also has a destination.

Roof replacement	Property facts and the marketing brief for agent review.
Chandelier	Proposed exclusion in the applicable contract draft for the agent to verify.
Call after five	Contact preference for the agent and Operations.

Compass contact export

When the property is Upcoming and the required contact fields are ready, Synergy creates Compass Contact Export.csv and files it in 07 Seller Week of Tasks/Email. Each co-owner has a separate row.

Sid opens the property, clicks Download for Compass, imports the file in Compass and marks it imported.

START HERE · HANDOFF FOR SID

From possible listing to seller

This is the workflow to build. Sid works from one property in Synergy. Daniel’s Compass Drive holds its files. The seller receives access in two steps.

1 Open a Possible Listing

Sid enters the address and unit, seller contact, assigned agent and appointment details. Synergy opens the Operations intake and provisions one address folder in Seller Division / 1. Possible Listings, with the 15 subfolders on S2–S3. Its main checklist opens in Synergy.

2 Prepare the meeting

Synergy prepares the listing packet, presentation and seller guide for review. Sid resolves missing items. The agent approves the material the prospect may see. The prospect receives the meeting materials before signing.

3 Confirm the listing and unlock the portal

Once the listing agreement is fully signed and the readiness checks on S4 pass, Sid confirms the move to Upcoming. The same address folder moves with the listing. Synergy creates or links the live property to the intake and makes the seller forms available at the same private link.

4 Use each answer where it belongs

The seller submits a form. Synergy saves the dated PDF, stores individual answers, links the file to the checklist and shows the responsible person what needs review. Agent-approved information can populate contract drafts and marketing work.

5 Import the contact into Compass

At Upcoming, Synergy files the contact export automatically as soon as the required contact fields are ready. Sid clicks Download for Compass in the property and confirms the manual import.

DRIVE MAP · 1 OF 2

What goes in each folder?

Use the existing folder names below. “Starter” means the file is in the documented starter routine. “Later” gives the proposed filing destination when real material is ready. Empty folders are expected.

01 Original Property Photos	Later • Verified original property image, sourced by the system and matched to the address and unit. Record source and permitted use. Flag a missing photo for review.
02 Seller Checklist	Starter • Seller Checklist.pdf, a reference copy. The live checklist, completion evidence and task owners stay inside the Synergy property.
03 Listing Presentation Documents	Starter • Listing appointment packet.txt, Property research worksheet.txt, Seller questionnaire.txt. Later • Listing Appointment Packet.pdf, Listing Presentation.pdf, Property Research and Sources.pdf and dated Seller Questionnaire Responses.pdf. Keep internal research private.
04 Seller guide	Starter • The Synergy Group Seller Guide.txt contains the guide URL. Later • Approved Seller Guide.pdf or a link to the approved master, available from the first meeting.
05 Listing Agreement	Starter • Agreement preparation worksheet.txt. Later • Agent-reviewed listing agreement draft, executed listing agreement, signing certificate when available and signed extensions.
06.Home Improvement	Later • Home Prep and Timeline.pdf, approved scope, vendor estimates and work confirmations as received.
07 Seller Week of Tasks/Email	Starter • Seller Property Information - Fillable Form.pdf, Showing preparation worksheet.txt, First seller email - review draft.txt. Later • Property Information and Showing Preferences.pdf, Compass Contact Export.csv and seller communication records. The contact export is team-only.

DRIVE MAP · 2 OF 2

Where later files belong

Synergy should keep the Drive file ID on its matching property task. An empty folder, an email draft or an unsigned worksheet cannot close a task that requires a completed document.

08 Agent Week of	Later • Agent launch brief, approved listing remarks, launch instructions and copies of delivered seller reports. Link each report to Reporting in Synergy.
09 Agent Photos and Videos	Later • Agent-shot photos, walkthrough footage and agent video edits.
10 Disclosure Packets	Later • Applicable signed disclosures, Condo or HOA Resale Package request summary.pdf, association-issued resale packet and evidence of delivery.
11 Yards Signs and Lockboxes	Later • Sign installation order, installation confirmation and lockbox placement confirmation. Keep access details in restricted team records.
12 Professional Photos	Later • Vendor-delivered final gallery and the approved cover image. Retain the original image in folder 01.
13 Open House Materials	Later • Approved open-house flyer, handouts and event-specific materials.
14 Multiple offer Spreadsheet	Later • Offer comparison sheet, received offer versions and documented seller direction. Link the accepted offer to the executed contract.
Ratified Contract and Documents	Later • Executed purchase contract, signed amendments, Seller Closing Preferences.pdf, milestone evidence and closing packet received from title.

If the listing drops

Keep the intake under Past Possible Seller with its history. No Upcoming promotion or automatic Compass export. A separate voided-documents folder remains a proposal; preserve superseded versions and their status.

SELLER HANDOFF

What Sid confirms before sharing

A prospect can view the approved appointment materials before signing. The working seller portal opens only after the signed agreement and the promotion checks are confirmed.

Before the meeting • Assemble three client-facing items

Use approved team masters for the seller guide and presentation. Assemble the packet from the matched property and tax records, prior Bright listing when available, dated comparable sales, and a relevant marketing example. Synergy should pull from available authorized sources and flag exactly what is missing. The agent approves pricing and comparisons.

Before the invitation • Check the identity and evidence

Confirm the address and unit, intended sellers and their email addresses, assigned agent, working Drive folder, approved client-facing packet and executed listing agreement. Confirm the agreed marketing path, including Private Exclusive where applicable. Future-stage folders can still be empty.

At confirmation • Move the existing record

Sid confirms Upcoming in Synergy. The system moves the same Drive folder, retains its links and checklist history, activates Agent and Marketing tasks and prepares the invitation. Sid verifies the recipient and sends the approved Compass email. Each seller receives individual access to this property.

When something is missing • Keep the work visible

For an unsigned agreement show Awaiting signature. For a failed folder move show Drive move needs attention. Assign the issue to Sid and retry against the existing property and folder. Mark the portal shared only after the invitation is actually sent.

What the seller sees

The same listing packet, presentation and guide, plus the questionnaire, the remaining forms, the current stage and the next action. Later, display approved reports, signing requests, confirmed dates and final seller copies.

SELLER PORTAL · FIVE FORMS

Where each submission goes

Each submission should create a dated PDF in the address folder, save the answers as separate fields in Synergy and attach the file link to its checklist task. Sid can open it from the property.

Seller questionnaire → 03 Listing Presentation Documents

Seller Questionnaire Responses.pdf records goals, timing, likes and dislikes, home facts, improvements, exclusions and concerns. Marketing can draft from approved highlights. Operations receives timing and contact preferences. The agent reviews exclusions for the applicable contract draft.

Home prep and timeline → 06.Home Improvement

Home Prep and Timeline.pdf records repairs, staging preferences, available dates and work the seller wants to discuss. Sid uses it to schedule approved work. Marketing uses confirmed photography dates.

Property information and showing preferences → 07 Seller Week of Tasks/Email

Property Information and Showing Preferences.pdf records occupancy, property facts, notice requirements, contact method and access arrangements. Sid checks showing instructions. Differences from existing records go to review.

Condo or HOA resale package → 10 Disclosure Packets

Condo or HOA Resale Package request summary.pdf records the manager, ordering status, expected delivery date and restrictions. The association-issued packet and proof of delivery are separate files with separate checklist tasks.

Seller closing preferences → Ratified Contract and Documents

Seller Closing Preferences.pdf records signing availability, move-out timing and key handoff. Sid uses the answers to coordinate with title. The executed settlement documents arrive later from title.

DATA HANDOFF

From one answer to the next task

Example • The seller writes that the roof was replaced in 2023, the dining-room chandelier will move with them, and they prefer calls after 5 p.m.

What the system prepares

Roof → property improvements and marketing brief for agent review. Chandelier → proposed exclusion in the applicable agreement draft. Call after 5 → contact preference for Operations and the agent. All three stay in the dated questionnaire. A correction creates a new version and flags affected drafts for review.

What the agent confirms

The agent checks names, terms, jurisdiction, approved forms and any conflict before signature. Verified fields can prefill the approved signing template. Executed files return to folder 05, 10 or Ratified Contract and Documents according to document type.

What Synergy files for Compass

Once Upcoming and the team’s required contact fields are complete, generate Compass Contact Export.csv in folder 07. Include one row per seller. Map names, phone numbers, emails and other supported contact fields against the team’s actual import template before release.

What Sid clicks

The property shows Ready for Compass beside Download for Compass. Sid downloads there, checks for existing contacts, uploads in Compass and marks the task imported. Before import, corrections refresh the file. After import, Synergy flags the changed field for Sid.

What happens after launch

At Active, confirm the Bright listing date and expiration. Reporting starts its 14-day timer from the listing date. An agreed delay changes the due date. Completing a report restarts the cycle. At Under Contract, surface milestones. At Closed, link the seller’s final copies.