

Docem – Guide to Create Files for Purchase Brokerage Contract

Given that since June 10, 2022, a buyer client will have to sign a purchase brokerage contract with a broker, because a verbal agreement will be prohibited, we have prepared a guide to help you correctly create your purchase brokerage contract files in Docem.

FIRST STEP: Before the client finds the property he is looking for.

1- Go to Workspace and click on + Create File

File

MLS/Register # Broker filter

Listing status Client filter

Transaction status Closed filter

+ Create file Save Cancel Merge

Create a file for your listing or/and transaction.

Num	Street	Unit	City	Options
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2- Enter the BUYER'S HOME ADDRESS, under **Type** choose OTHER and click on SAVE

Workspace > File

File

Number **ADD**

Street **BUYER'S**

Unit

Postal code **HOME**

Country **ADDRESS**

Province

City **HERE**

Number end

Type

Complete

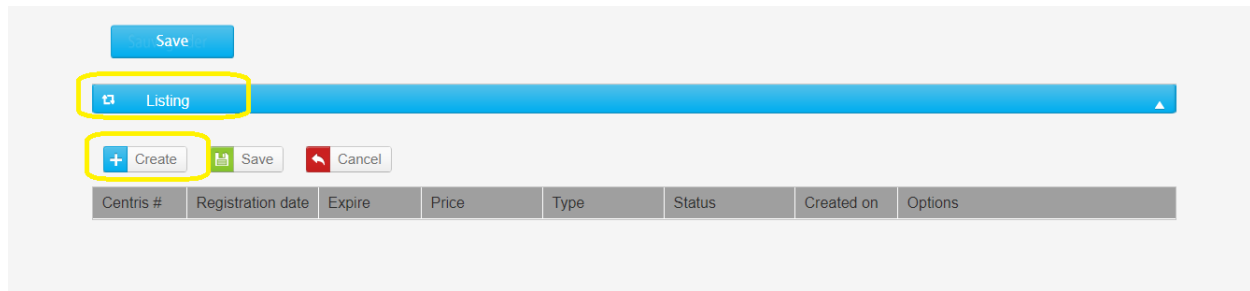
Closed

Id

Created on

Save

3- Under LISTING click on the button + Create



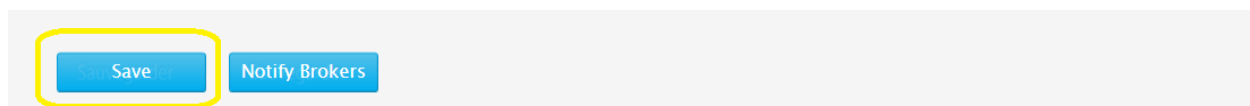
4- You will be taken to the DETAIL page. Fill out the following fields:

- **Type** choose PURCHASE
- **Status** choose IN PROGRESS
- Enter **Registration date & Expiration Date**
- **Contract #** enter the Brokerage Contract Purchase number

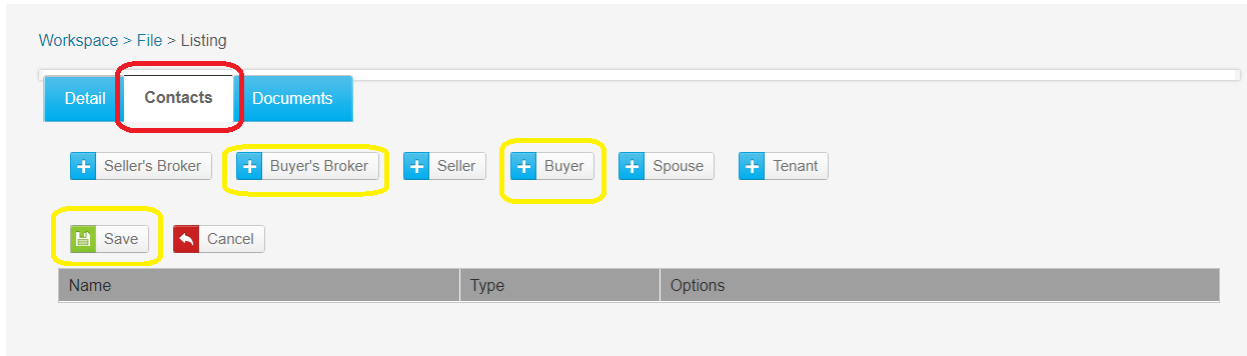
The screenshot shows the 'Detail' page for a listing. The breadcrumb is 'Workspace > File > Listing'. A 'Detail' tab is highlighted. The form contains the following fields:

- Centris # (text input)
- Type (dropdown menu, set to 'Purchase')
- Status (dropdown menu, set to 'In progress')
- Registration date (text input, with annotation 'Date of Contract signature')
- Expiration date (text input, with annotation 'Date of Contract expiration')
- Price (text input)
- Tot. retribution (text input)
- Contract # (text input, with annotation 'Brokerage contract #')
- Cadastre (text input)
- Built Year (text input)
- School Tax (text input)
- Municipality Tax (text input)
- Water Tax (text input)
- Federal Tax (text input)

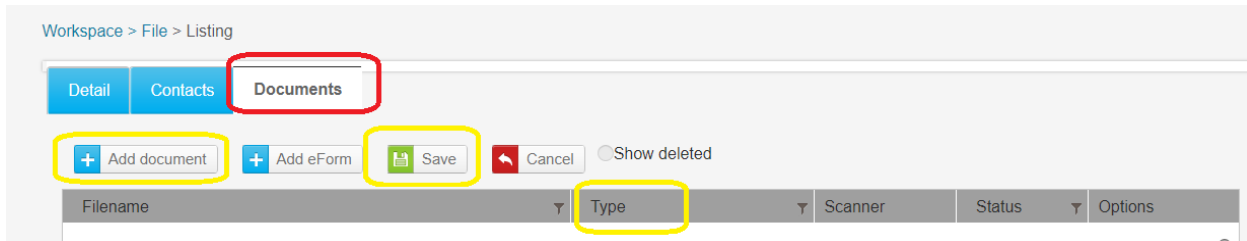
5- Click on the SAVE button at the bottom of the page.



6- Go to the CONTACTS page and add: Buyer's Broker (yourself) and the Buyer(s). Click on the SAVE button.

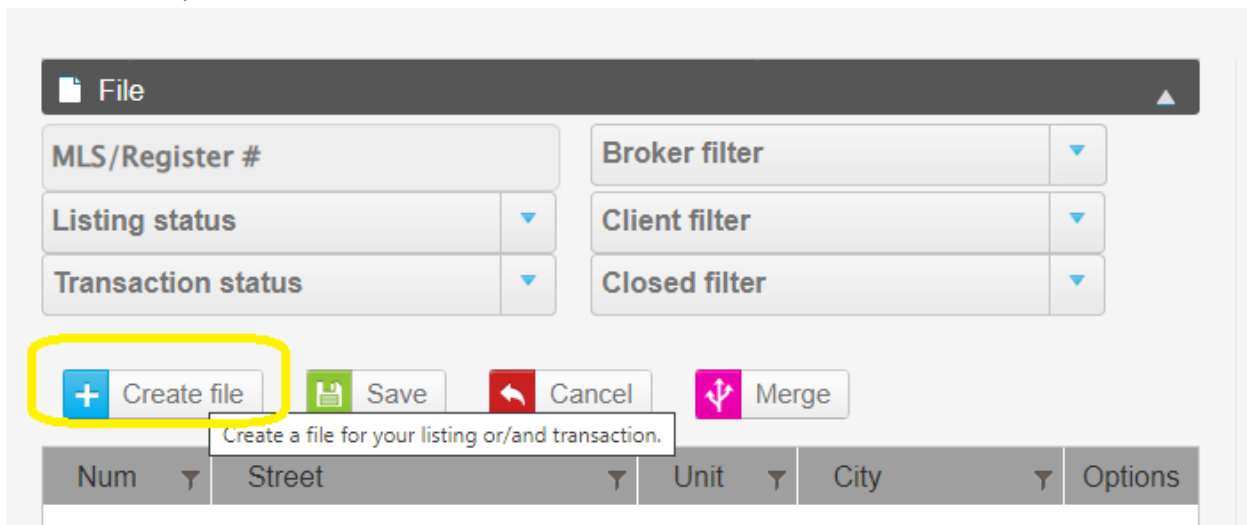


7- Go to the DOCUMENTS page: add the Purchase Brokerage Contract and identify the document under the Type column. Click on the SAVE button.



SECOND STEP: After the client finds the property he is looking for.

1- Go to Workspace and click on + Create File to create a **whole new file**



2- Enter the **ADDRESS OF THE PROPERTY** appearing on the **Promise to Purchase** add it's Type and click on **SAVE**.

The screenshot shows a form with two columns of input fields. The left column contains: Number, Street, Unit, Postal code, Country (Canada), Province (Quebec), City (Select city), and City name. The right column contains: Number end, Type, Complete, Closed, Id (0), and Created on (2022/09/02 10:24 AM). A blue Save button is located at the bottom left of the form.

3- Under **TRANSACTION** click on the button + Create

The screenshot displays two table headers. The top table, 'Listing', has columns: Centris #, Registration date, Expire, Price, Type, Status, Created on, and Options. The bottom table, 'Transactions', has columns: Type, Status, Offer date, Acceptance date, Cond. raised date, Notarize, Created on, and Options. In the Transactions section, the '+ Create' button is highlighted with a red box, and the 'Save' button is highlighted with a yellow box.

4- You will be taken to the **DETAIL** page. Fill out all the fields on the left side of the page.

5- Click on the **SAVE** button at the bottom of the page.

6- Go to the CONTACTS page and add: Seller's Broker, Seller(s), Buyer's Broker, Buyer(s), Notary. Click on the SAVE button.



7- Go to the DOCUMENTS page: add the Promise to Purchase and all the documents related to the purchase. Identify each document under the Type column. Click on the SAVE button.

