

Transaction coordination and document management

Automates transaction coordination from contract acceptance through closing by managing documents, tracking milestones, and updating all stakeholders. Reduces transaction processing time by 40% while ensuring compliance and transparency.

Download PDF

Get Your Blueprint

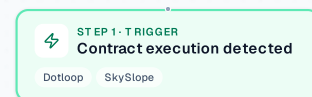


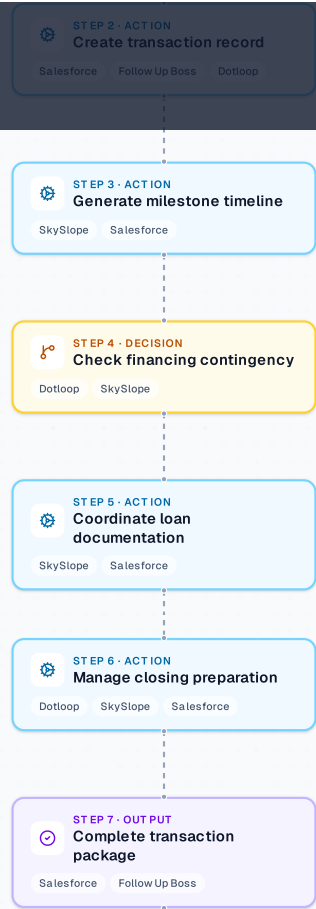
WORKFLOW TRIGGER

Purchase agreement is executed and uploaded to transaction management system

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





+
-
☰

Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Contract execution detected

System detects a new executed purchase agreement uploaded to the transaction management platform. Contract details and key dates are automatically extracted.

2

 ACTION

Create transaction record

Automatically creates comprehensive transaction record in CRM with property details, buyer/seller information, and critical milestone dates. Assigns transaction coordinator and sets up document repository.

Salesforce

Follow Up Boss

Dotloop

3

 ACTION

Generate milestone timeline

Creates automated task sequences for inspection periods, loan approval deadlines, appraisal scheduling, and closing preparation. Sends initial notifications to all parties with timeline overview.

SkySlope

Salesforce

4

 DECISION

Check financing contingency

Evaluates if transaction includes financing contingency to determine loan coordination workflow branch. Routes cash transactions to expedited processing track.

Dotloop

SkySlope

5

 ACTION

Coordinate loan documentation

Automatically requests and tracks loan application status, appraisal scheduling, and lender communication. Sends reminders for missing documents and updates timeline based on lender feedback.

SkySlope

Salesforce

6

 ACTION

Manage closing preparation

Coordinates title company communication, schedules final walkthrough, and ensures all required documents are collected and reviewed. Generates pre-closing checklist for all parties.

Dotloop

SkySlope

Salesforce

7

 OUTPUT

Complete transaction package

Delivers fully organized digital transaction file with all executed documents, compliance records, and commission tracking. Updates CRM with closed status and triggers post-closing follow-up sequences.

Salesforce

Follow Up Boss



Outputs

- Organized digital transaction file

- Updated CRM with closed deal status

AI Business OS



Key Metrics

- Average days to closing
- Document completion rate
- Client satisfaction score



Tools & Integrations

- Salesforce
- Follow Up Boss
- Dotloop
- SkySlope

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

COMPANY

[About](#)

[Industries](#)

CONNECT

[MVP.dev](#)

[LinkedIn](#)

RESOURCES

[Articles](#)