Transaction Coordinator

OCTOBER 15, 2026

☐ Portal ☑ Advanced

Transaction Coordinator

Turns an accepted contract into a coordination packet: deadline calendar with calendar links, owner-based task checklist, missing-document review, risk and compliance flags, escrow/lender/title coordination, and ready client email and SMS updates.

REAL ESTATE · TRANSACTION MANAGEMENT

#AI DEALS · #BROKER READY · #COMPLIANCE · #DEADLINES · #ESCROW · #REAL ESTATE · #REALTOR · #SBK FLOW · #TRANSACTION COORDINATION · #UNDER CONTRACT

GOOGLE CALENDAR · NBN · OPENAI

What this agent does

Replace the manual under-contract checklist with a contract-first packet that never guesses a legal deadline.

Turns an accepted contract into a coordination packet: deadline calendar with calendar links, owner-based task checklist, missing-document review, risk and compliance flags, escrow/lender/title coordination, and ready client email and SMS updates.

Who it is for

Transaction coordinators, listing and buyer agents managing files under contract, and brokerages that need a consistent compliance trail.

What it needs from you (inputs)

Contract terms and optional contract files, the property and its state and county, the parties and transaction lane, every contract-controlled date, plus contingencies, special terms, known missing items, and compliance notes.

What it gives back (outputs)

A transaction command center, deadline calendar, task checklist, missing items, risk flags, document review summary, escrow/lender/title coordination plan, client update messages, and compliance source notes.

- Transaction Command Center
- Deadline Calendar
- Task Checklist
- Missing Items
- Risk Flags
- Document Review Summary
- Client Update
- Compliance Source Notes
- Escrow / Lender / Title Coordination

Highlights

- Contract-first deadline calendar with add-to-calendar links and reminders
- Owner-based task checklist — agent, client, lender, title, escrow
- Missing document and information review
- Risk flags routed to broker, title, lender, or attorney review
- Escrow, lender, and title coordination plan
- Client-ready email, SMS, and internal agent note
- Official public source notes for state and county context
- Contract file upload — up to 8 PDF, DOC, DOCX, or TXT files

Time saved per run: about 2.5 hours.

This agent drafts work for a licensed professional to review. It is not legal, tax, or financial advice, and it does not replace broker, title, lender, or attorney review.

EDIT DESCRIPTION

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REAL ESTATE AI AGENT

Transaction Coordinator

Build a contract-first coordination packet: a deadline calendar with calendar links, an owner-based task list, missing documents, risk and compliance flags, and client-ready updates.

Readiness **25** · Deadlines **0** · Review **0**

1 Choose Entities

Org
-- Select Org --

Operator
Sharon BK

Contact
-- Select Contact --

Project
-- Select Project --

Item
-- Select Item --

Context artifacts (facts)
Property Address 702-555-1326 Fact General

2 Choose Artifacts

Artifacts selected for this run
☑ **Select all**
Enable this artifact to map it

	Artifact	Type	Source	Map to field
☑	contract_terms Not selected	text	Context	No field
☑	Inspection Findings (paste key items) Not selected	text	Context	No field
☑	new test lable Not selected	text	Context	No field
☑	Operator ID 56	text	Context	compliance_review_score
☑	Operator Name Sharon BK	text	Context	City
☑	Operator Phone 702-555-1326	text	Context	transaction_readiness_score
☑	Operator Phone Not selected	text	Context	No field
☑	Operator Test Key lable Operator Test Key VALUE after save from operator page	text	Context	deadline_quality_score
☑	Property Address 702-555-1326	text	Context	Property address
☑	User Email sharonbk6@gmail.com	text	Context	State
☑	User ID 1	text	Context	Contract terms
☑	User Name Sharon BK	text	Context	Contract type / form
☑	User Username ai-agent-plugin-dev	text	Context	County

Auto-map again

Choose from the Artifacts Library

Contract intake

Paste the contract summary, title and lender notes, the email thread, or your TC notes. Deadlines should come from the contract wherever possible.

Contract terms

A buyer offer has been accepted and the agent needs a clean transaction coordination packet.

Demo Input

Accepted offer — 1124 Desert Ridge Ave, Las Vegas, NV 89135 (Clark County).
GLVAR Residential Purchase Agreement, fully executed 9/4/2026.

Save field value to -- None --

Contract files
Up to 8 files. PDF, DOC, DOCX, or TXT. 10 MB per file, 40 MB total.
Choose Files No file chosen

Property address
123 Sunset Ridge Dr, Las Vegas, NV 89148
Save field value to -- None --

State
Nevada
Save field value to -- None --

County
Clark County
Save field value to -- None --

City
Las Vegas
Save field value to -- None --

Contract type / form
Residential purchase agreement
Save field value to -- None --

Parties and lane

This controls task owners, client language, and routing.

Client name
Save field value to -- None --

Client email
Save field value to -- None --

Mobile phone
Save field value to -- None --

Client type
buyer
Save field value to -- None --

Side represented
buyer
Save field value to -- None --

Transaction stage
under_contract
Save field value to -- None --

Accepted price
682000
Save field value to -- None --

Loan type
conventional
Save field value to -- None --

Contract dates

Accurate output depends on these. Leave a date blank if it is unknown — the workflow flags it rather than inventing it.

Contract date
mm/dd/yyyy
Save field value to -- None --

Closing date
mm/dd/yyyy
Save field value to -- None --

Escrow open date
mm/dd/yyyy
Save field value to -- None --

Inspection deadline
mm/dd/yyyy
Save field value to -- None --

Appraisal deadline
mm/dd/yyyy
Save field value to -- None --

Loan contingency deadline
mm/dd/yyyy
Save field value to -- None --

Terms and review

The output stays conservative and marks anything that needs broker, title, lender, or attorney verification.

Contingencies / special deadlines
Inspection, appraisal, loan, sale of buyer property, HOA review, repairs, rent-back, seller credits.
Save field value to -- None --

Known missing items
Executed contract, preapproval, earnest money receipt, seller disclosures, HOA docs, repair addendum.
Save field value to -- None --

Compliance / broker notes
Anything that must be reviewed by broker, title, lender, attorney, or the compliance team.
Save field value to -- None --

Agent notes
Client tone, known risks, lender and title status, communication preference, what is urgent today.
Save field value to -- None --

+ **Advanced options** — partners, earnest money, the remaining deadlines, time zone, and special terms

Add state and county for official-source research. Without them, verification will be weaker.

Estimated credits: 0 (Balance: 200)

Building the transaction plan...

GENERATED AI AGENT

Transaction Command Center

Draft Ready
Draft is ready. Check, save, or continue with an AI agent.

Sort: Newest first

Run ID: 796 | **Artifacts:** 8 | **Auto-mapped fields:** 6 | **Credits Reserved:** 0 | **Credits Charged:** 0 | **Credits Breakdown:** Base 0

☑ **Deadline Calendar** html Draft
Key: deadline_calendar Label: Deadline Calendar
Attached entity: Sharon BK (Operator)

Deadline Calendar

Contract-entered deadlines with reminder and calendar links.

Reminder message: All deadlines are based on the fully executed contract date (9/4/2026). Title review deadline is 10 days after receipt of prelim. Possession at recording.

Milestone	Date	Owner	Risk	Basis	Calendar
Earnest Money Deposit Due	2026-09-09	Buyer/Agent	high	contract	Add
Seller Real Property Disclosure Due	2026-09-09	Seller/Listing Agent	medium	contract	Add
HOA Documents Due	2026-09-14	Seller/Listing Agent	medium	contract	Add
Inspection/Due Diligence Deadline	2026-09-14	Buyer/Agent	high	contract	Add
Appraisal Deadline	2026-09-25	Buyer/Lender	high	contract	Add
Loan Contingency / Final Approval	2026-10-04	Buyer/Lender	high	contract	Add
Title Review Deadline		Buyer/Agent	high	contract	
Final Walkthrough	2026-10-16	Buyer/Agent	medium	contract	Add
Close of Escrow	2026-10-18	Escrow/All Parties	high	contract	Add

Copy HTML · Copy Text
Attach to entity Sharon BK (Operator)
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☐ **Task Checklist** html Draft
Key: task_checklist Label: Task Checklist
Attached entity: Sharon BK (Operator)

Task Checklist

Owner-based transaction tasks.

Task	Owner	Due	Priority	Status	Notes
Confirm EMD receipt by escrow	TC/Buyer Agent	2026-09-09	high	pending	Wire confirmation required from Nevada Title Company.
Obtain seller's Real Property Disclosure	TC/Buyer Agent	2026-09-09	high	pending	Follow up with listing agent if not received by due date.
Request HOA documents (Summerlin North CA)	TC/Buyer Agent	2026-09-14	medium	pending	Confirm delivery and review for fees/capital contribution.
Schedule and complete inspections	Buyer/Agent	2026-09-14	high	pending	Coordinate with buyer and inspectors.
Order appraisal	Lender	2026-09-25	high	pending	Confirm with Silver State Mortgage.
Track loan contingency/final approval	Lender/TC	2026-10-04	high	pending	Coordinate with Danielle Pruitt at Silver State Mortgage.
Track title review deadline	TC/Buyer Agent		high	pending	Deadline is 10 days after receipt of prelim title report. Date to be confirmed.
Schedule final walkthrough	Buyer/Agent	2026-10-16	medium	pending	Coordinate with buyer and listing agent.
Confirm close of escrow and possession	Escrow/TC	2026-10-18	high	pending	Confirm recording and possession transfer.
Confirm 1031 exchange accommodator details	Listing Agent/Seller		high	pending	Required for simultaneous close.
Obtain pool resurfacing permit	Listing Agent/Seller		medium	pending	Permit for 2024 resurfacing not located.
Confirm home warranty acceptance	Listing Agent/Seller		medium	pending	Buyer requested; seller has not responded in writing.
Initiate solar lease assumption with Sunrun	Buyer/Agent		high	pending	Assumption packet not started.
Confirm HOA transfer fee and capital contribution	Listing Agent/HOA		medium	pending	Fees unconfirmed.

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☐ **Missing Items** html Draft
Key: missing_items Label: Missing Items
Attached entity: Sharon BK (Operator)

Missing Items

Documents and information needed to keep the file complete.

Document	Why Needed	Owner	Due	Status
1031 exchange accommodator details	Required for simultaneous close per seller's 1031 exchange.	Listing Agent/Seller		missing
Pool resurfacing permit (2024)	Permit not located; needed for buyer due diligence.	Listing Agent/Seller		missing
Home warranty confirmation	Buyer requested; seller has not responded in writing.	Listing Agent/Seller		missing
Solar lease assumption packet (Sunrun)	Buyer must assume solar lease; process not started.	Buyer/Agent		missing
HOA transfer fee and capital contribution confirmation	Required for buyer's financial review.	Listing Agent/HOA		missing

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☐ **Risk Flags** html Draft
Key: risk_flags Label: Risk Flags
Attached entity: Sharon BK (Operator)

Risk Flags

Broker/title/lender/attorney review flags. Not legal advice.

Risk summary

Several items require urgent follow-up: seller's 1031 accommodator not named, pool resurfacing permit missing, home warranty not confirmed, solar lease assumption not started, HOA transfer/capital contribution fees unconfirmed. Title review deadline is contract-dependent (10 days after prelim). Broker, title, and lender review required.

Compliance flags

- 1031 exchange accommodator not named
- Pool resurfacing permit missing
- Home warranty not confirmed
- Solar lease assumption not started
- HOA transfer fee/capital contribution unconfirmed
- Title review deadline date not yet set (dependent on prelim receipt)

Broker review notes

Review required for 1031 exchange coordination, solar lease assumption, pool permit, and HOA fee confirmation. Title review deadline is contract-dependent. Ensure all compliance items are addressed.

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☐ **Document Review Summary** html Draft
Key: document_review_summary Label: Document Review Summary
Attached entity: Sharon BK (Operator)

Document Review Summary

Contract/file review notes and missing items.

Document	Why Needed	Owner	Due	Status
1031 exchange accommodator details	Required for simultaneous close per seller's 1031 exchange.	Listing Agent/Seller		missing
Pool resurfacing permit (2024)	Permit not located; needed for buyer due diligence.	Listing Agent/Seller		missing
Home warranty confirmation	Buyer requested; seller has not responded in writing.	Listing Agent/Seller		missing
Solar lease assumption packet (Sunrun)	Buyer must assume solar lease; process not started.	Buyer/Agent		missing
HOA transfer fee and capital contribution confirmation	Required for buyer's financial review.	Listing Agent/HOA		missing

Document review summary

Contract, buyer pre-approval, and escrow/title contact info confirmed. Missing: 1031 accommodator details, pool resurfacing permit, home warranty confirmation, solar lease assumption packet, HOA fee breakdown.

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Attach to entity Sharon BK (Operator)
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Save · Delete

☐ **Client Update** html Draft
Key: client_update Label: Client Update
Attached entity: Sharon BK (Operator)

Client Update

Ready email, SMS, and agent note.

Actions: Open Gmail Text Client

Email subject

Transaction Coordination Packet: 1124 Desert Ridge Ave – Under Contract Copy

Email body

Dear Jordan Nguyen,

Congratulations on your accepted offer for 1124 Desert Ridge Ave! We have initiated your transaction coordination. Key contract deadlines and next steps are outlined below. Please review the attached summary and let us know if you have any questions. We will keep you updated as we move through each milestone.

Best regards,
Your Transaction Coordination Team Copy

SMS

Congrats Jordan! Your offer for 1124 Desert Ridge Ave is under contract. We're coordinating all deadlines and will update you at each step. Copy

Agent note

Packet created for buyer-side transaction at 1124 Desert Ridge Ave. All contract deadlines entered. Several items flagged for urgent follow-up: 1031 accommodator, pool permit, home warranty, solar lease, HOA fees. Broker/title/lender review required. Copy

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Save · Delete

☐ **Compliance Source Notes** html Draft
Key: compliance_source_notes Label: Compliance Source Notes
Attached entity: Sharon BK (Operator)

Compliance Source Notes

Official or authoritative public context and verification notes.

Official-source confidence

contract-entered dates only; no statutory deadlines invented

Verification notes

Official research not requested. All deadlines are from the executed contract and should be verified with the parties and official documents.

Compliance source notes

No official statutory deadlines used. All dates are from the contract. Broker/title/lender review required for compliance.

- GLVAR Residential Purchase Agreement
  All contract deadlines and terms
- Nevada Title Company
  Escrow/title contact and file number
- Silver State Mortgage
  Lender contact and loan pre-approval

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☐ **Escrow / Lender / Title Coordination** html Draft
Key: escrow_lender_title_coordination Label: Escrow / Lender / Title Coordination
Attached entity: Sharon BK (Operator)

Escrow / Lender / Title Coordination

Escrow, lender, title, and closing partner coordination.

Task	Owner	Due	Priority	Status	Notes
Confirm EMD receipt by escrow	TC/Buyer Agent	2026-09-09	high	pending	Wire confirmation required from Nevada Title Company.
Obtain seller's Real Property Disclosure	TC/Buyer Agent	2026-09-09	high	pending	Follow up with listing agent if not received by due date.
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Copy HTML · Copy Text
Attach to entity Sharon BK (Operator)
Append # ☐ **Fact** Edit
Save · Delete

☐ **Select all**
Save Selected · Retry · Start fresh

Continue with agent Continue
Continue in new tab