

Broker Contract

Overview

The **Broker Contract** feature allows you to create contract templates that can be auto-filled with broker company data and downloaded as a Word document.

How It Works

Contracts are built using **Document Words** — placeholder codes that the system replaces automatically with real data from the broker's profile when the contract is generated.

For example, the code `-broker-name-` in the contract template will be replaced with the actual broker company name when downloaded.

Document Words

Available placeholder codes include:

Broker Information Codes:

Field	Code
Broker Type	<code>-Broker_type-</code>
Broker Company Name	<code>-Broker_company_name-</code>
Broker Authorized Name	<code>-Broker_authorized_name-</code>
Broker Authorized ID Number	<code>-Broker_authorized_id_number-</code>
Broker CRN	<code>-Broker_CRN-</code>
Broker Tax Card	<code>-Broker_tax_card-</code>
Broker Mobile	<code>-Broker_mobile-</code>
Broker Email	<code>-Broker_email-</code>

Field	Code
Broker Address	-Broker_address-
Broker Description	-Broker_description-
Broker Indirect Sale	-Broker_indirect_sale-
Broker Land Line	-Broker_land_line-
Broker Tag	-Broker_tag-
Broker Co. History	-Broker_co_history-
Broker Website / Social Media	-Broker_website-
Broker Branches	-Broker_branches-
Broker Owners	-Broker_owners-
Broker Sales Team	-Broker_sales_team-
Broker Administrative Contact Person	-Broker_administrative-
Broker Finance Team	-Broker_finance_team-

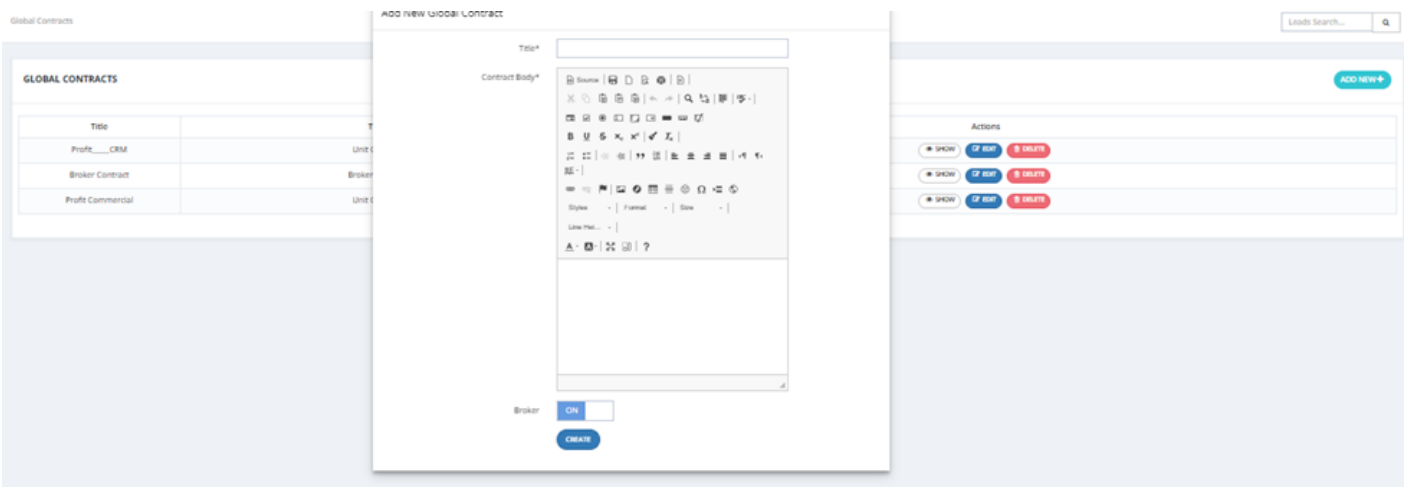
Code	Description
-broker-name-	Broker company name.
-payments-	Payment methods.
-payments_list-	List of payments.
-reservation_fees-	Reservation fees amount.
-total_paid-	Total amount paid.
-total_remaining-	Total remaining amount.
-total_amount-	Total contract amount.
-maintenance-	Maintenance fees.

And many more — view the full list in **Setup → Global Contracts → Document Words**.

How to Create a Broker Contract Template

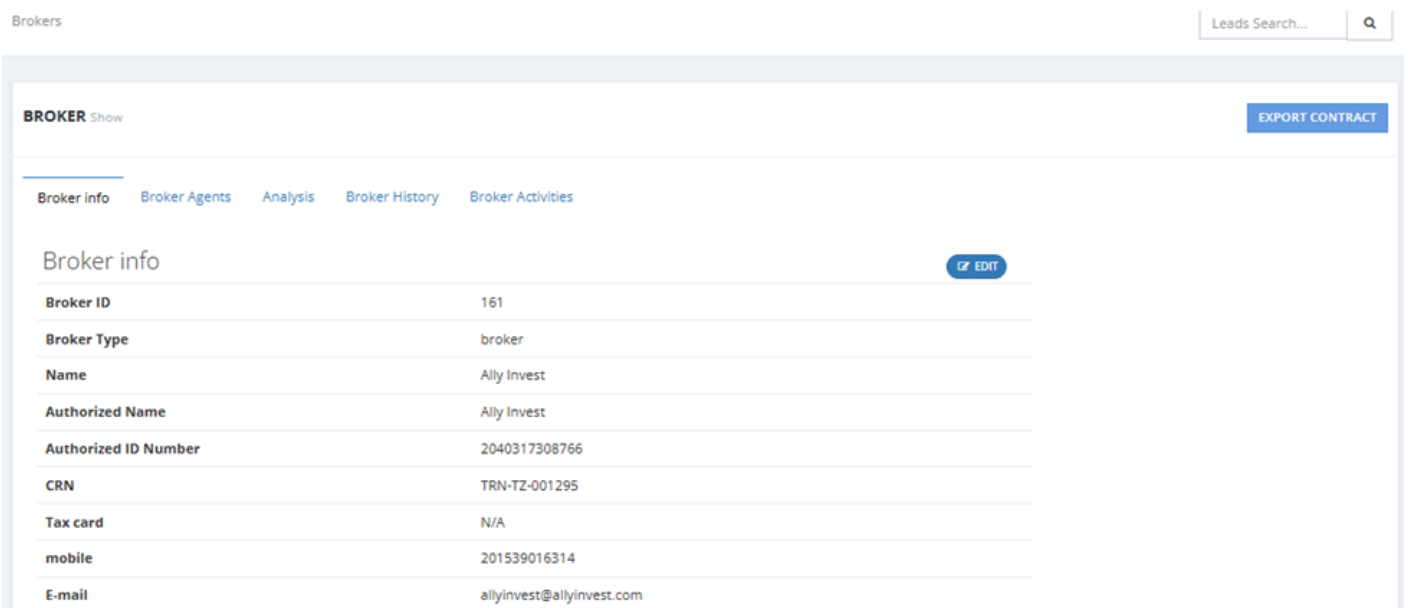
1. Go to **Setup → Global Contracts**.
2. Click **Add New**.
3. Fill in:

- **Title** — Contract name (e.g., "Broker Contract 2025").
 - **Contract Body** — Write the contract text and insert placeholder codes where dynamic data should appear.
 - **Broker** — Toggle ON to mark this as a broker contract.
4. Click **Create**.



How to Download a Broker Contract

1. Go to **Active Brokers** → open the broker's profile.
2. Click **Download Broker Contract** (or **Export Contract**).
3. Select which contract template to use.
4. The system generates a Word document with the broker's data filled in automatically.



Broker Settings

Access via **Settings** → **Broker Settings**:

Setting	Description
Broker Contract	Upload the default contract file template.
Can't Add Duplicated CIL	When ON, prevents duplicate CILs from being added.
Can't Add Duplicated CIL to the Same Broker CILs	When ON, prevents the same broker from submitting a duplicate CIL.
CIL Duplication Rejection Message	Message shown when a CIL is rejected as duplicate (e.g., "This CIL is Rejected").
CIL Duplication Acceptance Message	Message shown when a CIL is accepted (e.g., "CIL Added Successfully").
CIL Expiration Days	Number of days before a CIL expires.
Leads ID	Default Lead ID assigned to broker leads.
Block New Brokers By Default	When ON, all new brokers go to Pending/Blocked tab automatically.
Activity Todo Date (accept old date)	When ON, allows setting past dates for activity todo dates.
Start Contract Serial From	The starting number for contract serial numbering.

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