

Typing Offers for Agents

Offer Details Intake: Choose One Clear System

Before an offer is prepared, the agent and team leader should decide **how all offer details will be communicated to admin**. The goal is simple: one complete source of information, fewer follow-ups, and a clear record of the agent's instructions.

A team may choose:

- **Verbal intake:** Fast, but easiest to miss details. Best only when followed immediately by a written confirmation.
- **Email template:** Good for detailed instructions and creates a searchable record, but agents may skip questions or answer inconsistently.
- **Google Form / online intake form:** Usually the strongest option because required fields prevent missing information and keep every offer request consistent.
- **Offer drafting platform:** A structured tool such as VirtualOffer.ca can collect the agent's answers and route the completed information to the front desk for drafting. Century 21 Heritage Group identifies VirtualOffer.ca as a tool that lets agents answer questions so offers can be prepared in SkySlope or WebForms for client signature.

Recommended Team Standard

Use a templated offer-intake process for every offer.

The agent completes the intake form before the admin team begins preparing the package. Admin reviews the submission for completeness, prepares the documents for the registrant's review, and flags anything unclear or missing.

This keeps the admin role clerical and operational. The registrant remains responsible for all advice, strategy, clauses, price, terms, explanations, and client signatures. Ontario's rules require registered agents and brokerages to meet TRESA obligations, while RECO specifically recognizes that non-registered brokerage staff play an important role in supporting compliant operations.

Suggested Slide Copy

A Consistent Offer Intake Process

A complete offer starts with complete instructions.

Create one standard process for agents to provide offer details to admin—whether by email template, Google Form, or VirtualOffer.ca.

Why it matters

- Reduces back-and-forth between agent and admin
- Prevents missed details and last-minute corrections
- Creates a clear written record of instructions
- Helps admin prepare a complete package efficiently
- Keeps the registrant focused on advice, strategy, and client communication

Best Practice

Use a required-question intake form. The offer is not drafted until the required information is complete.

Admin's Role

Review for completeness, prepare documents for registrant review, organize the file, and flag missing information.

Registrant's Role

Confirm all details, advise the client, explain documents and clauses, obtain signatures, and present or negotiate the offer.

Core Questions for an Offer Intake Form

1. Property address and MLS number
2. Buyer names exactly as they should appear on the APS
3. Buyer representation agreement status
4. Purchase price
5. Deposit amount, form, holder, and delivery timing
6. Irrevocable date and time
7. Closing date
8. Chattels included
9. Fixtures excluded
10. Conditions required and deadlines
11. Financing details, if applicable
12. Home inspection details, if applicable
13. Status certificate, lawyer review, insurance, sale-of-property, or other conditions
14. Schedule A / Schedule B instructions
15. Additional clauses requested by the registrant
16. Commission or remuneration instructions requiring registrant review
17. Any representation, disclosure, or multiple-representation considerations
18. Notes or special instructions for the admin team

Training reminder: Do not let the form turn into a substitute for agent judgment. It gathers instructions; it does not replace the registrant’s review or client advice. RECO’s materials emphasize that services and assistance to consumers are regulated under TRESA, including required consumer information and explanation obligationsCreating



Preparing Buyer Forms in Skyslope Forms



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