

## JOB DESCRIPTION

<b>Position Title:</b>	Transaction Management Processor		
<b>Status:</b>	Non-exempt		
<b>Reports to:</b>	Director of Transaction Management		
<b>Written By:</b>	Michele An	<b>Date Written:</b>	January 24, 2018

### JOB SUMMARY

Performs a variety of moderate to difficult routine administrative tasks which require application of judgment and initiative. Responsible for assisting the Transaction Managers and Department with administrative support in the opening process of new contracts and assists with departmental projects and initiatives.

### PRIMARY FUNCTIONS

- **Open new escrows**
  1. Change status in the TSD system
  2. Create a Transaction Point ("TP") file
  3. Input dates and information in TP
  4. Set up alerts in TP for Transaction Manager
  5. Upload documents, reports and correspondence
  6. Send out opening letters to client, outside broker and vendors
  7. Complete CFA
  8. Change MLS status as noted on TSD
  9. (if applicable) Obtain M-1 authorization form from agent/client
    - Process M-1 request (place order, process payment and update worksheet)
    - Upload documents/reports to the individual TP file
    - Create receipts and approvals
  
- **Projects**  
**(Kamehameha Schools)**
  1. Review and research incoming requests for offer
  2. Process request
    - Generate new offers
    - Coordinate approvals
    - Collaborate the delivery of offers with team agent
  3. Maintain KS report and upload new inventory report on Locations' portal page
  4. Assist with mail outs (letters, notice of intents and seller disclosures)
  5. Open new escrows

### Duties may extend to other real estate projects

- **DPN**
  1. Input sales into DPN system
  2. Add sale to sales report
  
- **Other duties based on office need**
  1. Initiate the delivery of TM surveys to Transaction Management and TM Agents
  2. Assist with adding new agents/vendors into TP

**Branch:** Main office (Diamond Head).  
*Offsite arrangement policy is required if working at another location*

**Working Conditions:** Office environment

**Work Hours:** Monday – Friday, 8:00 a.m. – 5:00 p.m.

**Equipment Use:** Computer, printer, typewriter, fax, copy machine, scanner.

**Mental, Physical, and Communication Demands:**

Requires working under minimal supervision to meet daily deadlines; must be able to solve moderately complex issues and exercise discretion in dealing with confidential and sensitive issues. Requires attention to detail and accuracy. Requires prolonged sitting and computer work with occasional lifting and moving boxes. Requires effective communication with people at all levels of the organization and outside vendors. Ability to maintain a positive and professional attitude. Requires the ability to deal with constant requests for assistance with patience and tolerance. May require travel to vendors.

**Education/Experience required:**

- At least 2 years hands on administrative/secretarial, escrow or real estate experience.
- Excellent organizational, written and verbal communication skills.
- Ability to work on multiple projects and tasks simultaneously in a fast paced environment and able to effectively prioritize.
- Aptitude to learn new technologies
- Proficiency in Microsoft Word, Excel, Outlook.

**Personal Qualifications**

- Follows and demonstrates company values
- Knows how and when to appropriately escalate matters needing management attention
- Abide by departmental and personnel rules, guidelines and policies

The above information on this description has been designed to indicate the general nature and level of work performed by an employee in this classification. It is not to be interpreted as a comprehensive inventory, or all duties, responsibilities, and qualifications of employees assigned to this job. Management has the right to add to, revise, or delete information in this description. Reasonable accommodations will be made to enable qualified individuals with disabilities to perform the essential functions of this position.