FORM SIMPLICITY QUICK REFERENCE GUIDE – PROFESSIONAL/ULTIMATE EDITION

Library - Getting a Form

1. Click on "Start a Form." (Alternatively, you can click on "Library" in the menu bar at the top)
2. This will open up the 'Blank Form Library'.
3. You can search for forms by clicking on the "TITLE" column to sort alphabetically, or by typing in a keyword in the 'FIND FORM' field and clicking "FIND".
   HINT: You can preview a form by clicking on the magnifying glass icon next to the form title
   HINT: If you are a BROKER, you can disable access to specific forms by clicking the "DISABLE" button next to a form. This will remove the form from the library of every agent in your firm.
4. Once you have found the form(s), check the box to the left of the form(s) and select Print, Email or Download from the 'Select Command' dropdown menu above the form list.
5. If you want to fill it in before you print or email it, click on the form name itself to open it.
6. If you want to add a selected form to an existing transaction, click on the bar that says "Add to Transaction."

Creating a Forms Package

1. Click on "Forms Package" (or "Packages" from the top menu bar)
2. Click on the bar at the top right of the page that says "CREATE NEW FORM PACKAGE"
3. Name your new package and click 'SAVE'
4. Click on the name of your package to open it
5. To add forms to your package, click the 'ADD FORMS TO FORM PACKAGE' button at the bottom. This will open up the 'Blank Form Library'. Check the box next to the form(s) you would like to add and click "ADD TO TRANSACTION."
   Hint: Minimize typing time by pre-filling in information on the forms, like the Brokerage name, that doesn't change from transaction to transaction. Just click on form, type in the information, then click 'SAVE'
6. You can also upload a photo, brochure or other file to your package. Click on the bar "UPLOAD FILE" and find the file with your browser.

Transactions

<u>Creating a new transaction from a Package:</u>

1. Click on "Forms Package" (or "Packages" from the top menu bar)
2. You should see a list of Packages that either you or your Broker has already created.
3. Select the form Package you need by clicking the radio button next to the Package name.
4. Click on the bar at the top of the form list "CREATE TRANSACTION FROM SELECTED PACKAGE."
5. Name your new transaction and click 'SAVE'
6. Once the transaction is created, you can fill out the information two ways:
   a. Click on a form name to open it and type the information directly onto the form
   b. Click on the 'CONTENT' tab and fill out all relevant fields
      HINT: If you have an active MLS#, you can import the MLS data by typing the MLS# in the box in the upper right corner of the page and clicking on 'IMPORT MLS' (if activated by your MLS)
      HINT: Be sure to click "SAVE INFORMATION TO TRANSACTION" at the bottom of the content page!
7. If you want to 'ADD' an additional form to the transaction, click on the "ADD FORMS TO TRANSACTIONS" button at the bottom. This will open up the 'Blank Form Library'. Check the box next to the form(s) you would like to add and click "ADD TO TRANSACTION."
   HINT: If you want to DELETE a form from a transaction, check the box next to the form and under 'Select Command' choose 'DELETE'
8. You can also upload a photo, brochure or other file to your transaction. Click on the bar "UPLOAD FILE" and find the file with your browser.
   Hint: with the PROFESSIONAL EDITION you receive 50MB of storage space to upload files

See next page for instructions on emailing, printing, faxing, downloading and copying forms.

Transactions (continued)

Creating a new transaction without a Package:

1. Click on “Active Transactions” (or “ACTIVE” from the top menu bar)
2. Click on “CREATE NEW TRANSACTION”
3. Name your new transaction and click ‘SAVE’
4. Click on the name of the transaction to open it
5. To add forms to your transaction, click on “ADD FORMS TO TRANSACTIONS”
6. Check the box next to the form(s) you would like to add and click “ADD TO TRANSACTION”
   HINT: If you want to DELETE a form from a transaction, check the box next to the form and under ‘Select Command’ choose ‘DELETE’
7. Once you have added your forms, you can fill out the information two ways:
   a. Click on a form name to open it and type the information directly onto the form
   b. Click on the ‘CONTENT’ tab and fill out all relevant fields
   HINT: Be sure to click “SAVE INFORMATION TO TRANSACTION” at the bottom of the content page!
8. To PRINT forms:
   a. Check the box next to the form(s) you would like to print
   b. From the ‘SELECT COMMAND’ dropdown menu, choose “PRINT”
9. To EMAIL forms:
   a. Pick the forms and files you would like to send to your client by checking the boxes next to the form name
   b. On the “SELECT COMMAND” drop-down menu, click “EMAIL”
   c. Type in their e-mail address in the “To” field
   HINT: To send to multiple recipients, separate email addresses with a comma.
   d. Type in your subject line in the “Subject” field and type in any message you would like to send in the body of the email in the “Message” field
   e. Choose whether or not you would like to send a copy of the email to yourself by checking or un-checking the box.
   f. Choose whether to send the forms as locked (not editable by the recipient) or unlocked (editable by the recipient)by checking or un-checking the box
   g. Click ‘EMAIL’
10. To FAX forms (available with **Ultimate Edition** or may be provided by your Association):
   a. Pick the forms and files you would like to send to your client by checking the boxes next to the form name
   b. Enter in their name, phone number, fax number, and any message you would like to send
   Hint: Fax numbers must be entered as a long distance number (i.e. 14075555555)
   c. Click ‘FAX’
11. To DOWNLOAD forms:
   a. Check the box next to the form(s) you would like to download
   b. From the ‘SELECT COMMAND’ dropdown menu, choose “DOWNLOAD”
12. To COPY forms to a new transaction:
   a. Check the box next to the form(s) you would like to copy
   b. From the ‘SELECT COMMAND’ dropdown menu, choose “COPY TO A TRANSACTION”
14. To ESIGN forms (requires Ultimate Edition or separate DocuSign subscription):
   Using ESIGN (included in Ultimate Edition)
   a. Choose the forms/files you would like electronically signed
   b. Under the “SELECT COMMAND” drop-down menu, click ‘ESIGN’, then “SEND”
   c. Enter the Session Title, Email message, CC email addresses, and a session password, and choose your session options, then click ‘NEXT’
   Hint: session password is not required
   d. Add signers by clicking on “Add New”, entering their information, and clicking the symbol
   Hint: Change the signing order by checking the box next to a signer’s name and clicking “Move Up” or “Move Down”
   e. After you have entered all signers, click ‘NEXT’
   f. Check the box next to all forms to include in esign session
   Hint: You can also upload files from your computer by clicking “Upload From Computer”

g. Check the box next to all forms to include in esign session and click 'NEXT'
Hint: If available, you can apply a template to the form by clicking on the symbol
h. 'TAG' your document for initials/signatures by dragging and dropping the 'sticky notes' from the toolbar at the top, and click 'NEXT'
i. Review the document. If correct, click 'NEXT'
j. Enter the email message that will be received by all signers and click 'FINISH'
k. Your document(s) will be sent to all signers.
Hint: You can check the status of your signing session by clicking on the 'History' tab of your transaction
l. Once signed by all parties, you will receive an email with your completed document as an attachment. Also, within 1 hour the signed document will be automatically uploaded as a file in your transaction.

Using DOCUSIGN:

a. Choose the forms/files you would like electronically signed
b. Under the "SELECT COMMAND" drop-down menu, click 'DOCUSIGN'
c. Sign-in to your DocuSign account (if you do not have one, click on 'SIGNUP NOW' to purchase one)
d. Choose your recipients, the order in which the document should be sent out, your additional security settings (if applicable), click NEXT
e. Enter in a subject line for your e-mail and any message you would like to send, click NEXT
f. 'TAG' your document for initials/signatures by dragging and dropping the 'sticky notes' from the toolbar on the right side of the screen, click SEND
g. Once signed by all parties, you will receive an email with your completed document as an attachment. Also, within 1 hour the signed document will be automatically uploaded as a file in your transaction.

Submitting Transactions using 'Broker Submittals'

If your Broker has activated the 'Broker Submittals' tab, you can directly submit your transactions to your Broker for approval within Form Simplicity.

1. Click on 'Active Transactions'
2. Click on the name of the transaction you would like to submit
3. Click on the tab labeled 'Broker Submittals'
4. Click 'CREATE SUBMITTAL'
5. Name the submittal (if no name entered will default to the name of the transaction), and choose the appropriate submittal type from the drop-down list (i.e. Listing, Purchase, etc.)
6. Click on the name of the submittal you have just created
7. Review the checklist created by your Broker
8. Add the appropriate files from your transaction by clicking on the 'ADD FILE' button.
   Hint: the files you upload should correspond to the checklist items
9. Check off the items on the checklist that you are submitting
10. Enter the Due Date specified by your Broker (i.e. Listing Date, Closing Date, etc.)
11. You can send a message to your Broker by typing in the 'MOST RECENT MESSAGES' box and clicking 'ADD MESSAGE'
12. When your submittal is complete, click 'SUBMIT TO BROKER'
13. Your transaction has now been sent to your Broker for approval
    Hint: you can check the status of your submittal by clicking on the 'BROKER SUBMITTALS' tab within your transaction at any time
    Hint: you can re-submit your transaction if necessary by following the same procedure as listed above

Archiving

Archiving is a **paperless storage system**—save your important forms & files **electronically** on our **safe and secure servers** – for as long as you need.

1. To ARCHIVE a transaction
   a. Click on "Active Transactions" (or "ACTIVE" from the top menu bar)
   b. Find the transaction you would like to archive and click "EDIT"
   c. Click 'Archived'
   d. Click 'UPDATE'
   e. Your transaction has now been moved to the "ARCHIVED" section.

2. To VIEW your archived transactions:
    a. Click on “Archived Transactions” (or “ARCHIVED” from the top menu bar)
    b. Click name of Transaction to open it
    Hint: All the forms are locked / un-editable and no additional forms can be added
3. To return the transaction back to ACTIVE:
    a. Click on “Archived Transactions” (or “ARCHIVED” from the top menu bar)
    b. Click ‘EDIT’
    c. Click ‘Active’
    d. Click ‘UPDATE’

Clauses

1. To create CLAUSES:
    a. Click on “CLAUSES” from the top menu bar
    b. Click on “ADD NEW CLAUSE”
    c. Name your new clause in the “Name” field
    d. Type in the wording for your clause in the “Clause” field
    HINT: You can copy and paste a clause if you already have one saved in another document
    HINT: If you are a BROKER, you can make the clause available to all agents in your firm by checking the box next to “Brokerage Wide”
2. To add clauses to a form:
    a. Click on the title of the form to open it
    b. Click on the “INSERT CLAUSE” button within the form
    HINT: The “INSERT CLAUSE” button only appears in select areas and may not be available on all forms
    c. A pop-up will appear with a dropdown menu of the available clauses. Click on the clause and click “OK”
    HINT: You must have JavaScript enabled for the window to appear

Contacts

The CONTACTS section allows you to manage your contacts within Form Simplicity.

1. To ADD a contact
    a. Choose ‘ADD CONTACT’ from the “SELECT COMMAND” dropdown menu
    b. Enter their information
    c. Click ‘ADD’
2. To SYNC WITH GOOGLE CONTACTS
    a. Choose ‘SYNC WITH GOOGLE CONTACTS’ from the “SELECT COMMAND” dropdown menu
    b. Enter your Gmail address and password
    c. Click ‘SYNCHRONIZE CONTACTS’
3. To EDIT a contact
    a. Click ‘EDIT’
    b. Correct their information
    c. Click ‘UPDATE’
4. To DELETE a contact
    a. Click ‘DELETE’ next to the contact’s name

Preferences

The “Preferences” section allows you to update your account information (email address and/or login ID) and set up notifications.

To Update your Email Address or Login ID:

1. Click on “Preferences” from the top right corner of the page
2. Type in your updated email address
3. Type in your customized Login ID
4. Click “SAVE CHANGES”

To Update your Notification Preferences:

1. Click on “Preferences” from the top right corner of the page
2. Under “Email Notifications”, check the box next to “When I receive a fax”
3. Click “SAVE CHANGES”
4. You will now receive an email when you receive a new fax into a transaction

Additional notification options will be released soon!

Feedback

Your feedback is very valuable to us. The Feedback page allows you to contact us with any questions, comments, or requests.

1. Click on “FEEDBACK” from the top menu bar
2. Select a topic from the dropdown menu
3. Enter in your message
4. Click on “SUBMIT”

Your message will be sent to us and you will receive a response shortly

Help

Need further assistance? There are many help options available to you.

- Most pages contain “help bubbles” pertaining to specific tasks and functions. Just click on the bubble to receive hints and instructions for that section.
- The ‘HELP’ page contains an information-packed tutorial video
- The ‘HELP’ page also contains links to the Technology Helpline. You can contact them via phone, live chat, or e-mail
- There is also a listing of upcoming Form Simplicity training webinars. Just click on the link to register

BROKER FEATURES

If you are the Designated Broker in the office, when you login you will see an extra “Broker View” button on the top menu bar.

1. Click “Broker View”
2. Click on the “AGENTS” tab to see all the agents in your firm
3. Click on agents name to view how many “active” and “archived” transactions they have
4. Click on “view all active” or “view all archived” to see specific transactions
5. Click “EDIT” to rename the transaction, reassign the transaction to another agent, or change the status from “Active” to “Archived”
6. Click on a transaction name to open it. You can now view and edit all forms in the agent’s transaction.

You can also give another agent in each office “Broker Authority” so that they too can have access to the Broker tools.

1. Click “Broker View”
2. Click on the “SETUP” tab
3. Next to the office, click on “CHANGE”
   HINT: If you have multiple offices, you may need to change the dropdown at the top of the page to say “All Offices”
4. In the “Search” field, type in the last name of the person you would like to have Broker Authority
5. When their name appears in the list, click on their name.
6. To remove the Broker Authority, click on “CHANGE” and then “Remove Broker Authority”

From the “Broker View” you can also upload your **company logo** to appear on all State Association forms.

1. Click “Broker View”
2. Click on the “SETUP” tab
3. Under “Logo Upload”, click “Browse”
4. Find the logo where it is saved on your computer
5. Click “UPLOAD”

CLAUSES

Setting up clauses for all your agents to use is simple. It works the same as in the agent view except when you click 'Add New Clause' you will see two extra radio buttons.

1. Click Clauses on the toolbar
2. Setup your clause the same way as instructed above
3. 'Brokerage –wide' makes the clause available to all your agent's accounts
4. 'Personal' means the clause will only reside on your account

FORMS

You also have the ability to disable certain forms so your agents cannot access them:

1. Click on 'LIBRARY'
2. You will see an extra column at the far right labeled 'STATUS'
3. To disable a form, simply click 'DISABLE'. The form moves to the bottom of the list and your agents will no longer be able to access this form
4. To make the form accessible again, simply click 'ENABLE' and it moves back onto the list

Brokers can also UPGRADE to the "Broker Upgrade" package to have access to several more features:

- Create teams of agents that view & edit each other's transactions
- Create accounts for their non-licensed office assistants
- View all transactions in their firm on one page
- Control which files and transactions their agents can delete
- Create a paperless office with the "Broker Submittal" process

For more information, please contact us at 888-784-5404 or info@FormSimplicity.com