Master the Paperless Real Estate Transaction (3CE)

A Form Simplicity QuickStart Guide

Contact Information for Form Simplicity Technical Issues:
Call Tech Helpline – (888) 804-8223
Email Tech Helpline – support@TechHelpline.com
Monday through Friday – 7:00 AM to 6:00 PM MT;
Saturday & Sunday - 7:00 AM to 3:00 PM MT

Revised 1/4/2021

Antitrust Reminder

- Realtors are competitors, and healthy competition is what allows the market to survive. This classroom should be a forum for the sharing of ideas, fostering open discussion among participants. Florida Realtors and this board/association do not in any way encourage or sanction any particular business practice.

- Because of the nature of classroom discussions, all participants are asked to be mindful of antitrust laws. Florida Realtors (along with this local association) does not tolerate any discussion or activities of an anti-trust nature. Florida Realtors and this local association support the policy of competition outlined in antitrust laws. Because of the severity of the penalties involved, Florida Realtors will take all precautions necessary to ensure that violations of antitrust laws do not occur.

WHAT IS A REALTOR®?

"A REALTOR® is a member of the National Association of REALTORS®. The term REALTOR® is a trademarked term and lets people know that you are more than just a real estate practitioner: you adhere to a strict Code of Ethics that protects clients, the public, and other real estate agents. The term REALTOR® is not only a trademark owned by NAR and protected by federal law, it's a valuable membership benefit that distinguishes members from other real estate licensees. Non-members are never allowed to use the REALTOR® trademarks in reference to or in connection with their businesses or themselves. For more than 100 years, REALTORS® have subscribed to the NAR's strict Code of Ethics as a condition of membership. REALTORS® have the expertise and experience to help sellers protect their investment and help buyers build theirs. Research has determined that three out of four consumers would choose a REALTOR® to buy or sell a home rather than a real estate professional who is not a REALTOR®."

Florida Realtors® Student Code of Conduct

All students enrolled in Florida Realtors sponsored courses, including but not limited to, Graduate REALTOR® Institute (GRI) modules, Continuing Education (CE) courses, post licensing education programs, webinars, online courses and convention programs will adhere to and follow the REALTOR® Code of Ethics and the professional standards outlined in Florida State laws and rules.

Responsibilities of Students

- All students will exemplify the REALTOR® reputation through their conduct at all times.
- All students will document their participation appropriately, providing their full legal name, license number, and time in and out times on the sign-in sheet in order to receive credit.
- All students will comply with local sponsor policies and procedures.
- All students will refrain from any discussion that is or may be construed as being anti-trust in nature.
- All students must be honest and forthright in their participation in any course. Students will be receptive to the material and participate in all course activities, including but not limited to, discussions, case studies, quizzes, tests or other evaluations for the duration of the course.
- A student shall not impair, interfere with, or obstruct the orderly conduct and learning environment provided by Florida Realtors, local board sponsor, the students, faculty members, or invited guests. This includes, but is not limited to:
    1. Committing or threatening to commit any act of violence
    2. Threatening the health, safety or welfare of another
    3. Acting recklessly
    4. Invading the privacy of others
    5. Interfering with a faculty or staff member in the performance of his or her duty
    6. Making, exhibiting or producing any inappropriate, loud or disruptive behavior
    7. The use of portable computers, cellular telephones, portable personal music devices if such use disrupts others in the course
    8. The use of portable computers, cellular telephone, portable personal music devices is prohibited during end of course examinations. These devices must be turned off and placed inside a purse, briefcase or backpack during the duration of the examination.
- No student shall provide false or misleading information to the instructor, local board staff, or on official course documents.
- No student shall misuse any Florida Realtors or local board materials, service, property or resource.

What is Form Simplicity?

Form Simplicity is a paperless real estate forms management program to help you manage and send contracts as well as collaborate with all parties involved in the transaction. Form Simplicity gives you the tools to have your office "in the cloud."

Form Simplicity Professional Edition is available for you to use right now, at no additional cost. It is a member benefit available to all Florida Realtors® members. Log in at forms.floridarealtors.org.

Who owns Form Simplicity?

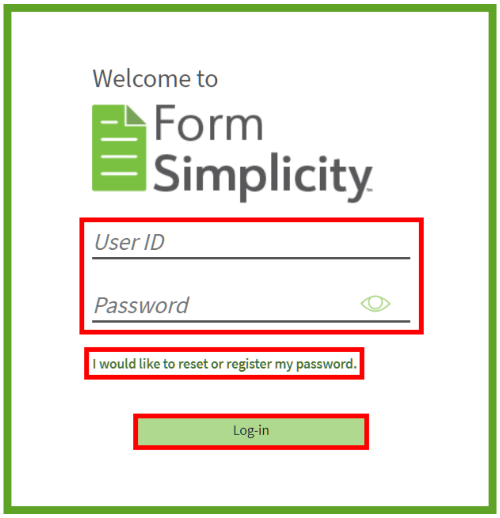
Form Simplicity is created and owned by Florida Realtors®. The Florida Realtors® Technology Tools Workgroup provides recommendations for Form Simplicity.

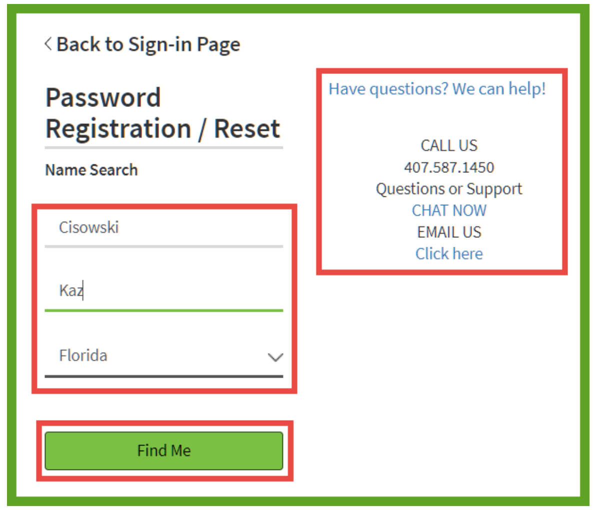
How will Form Simplicity help you work smarter in your real estate business?

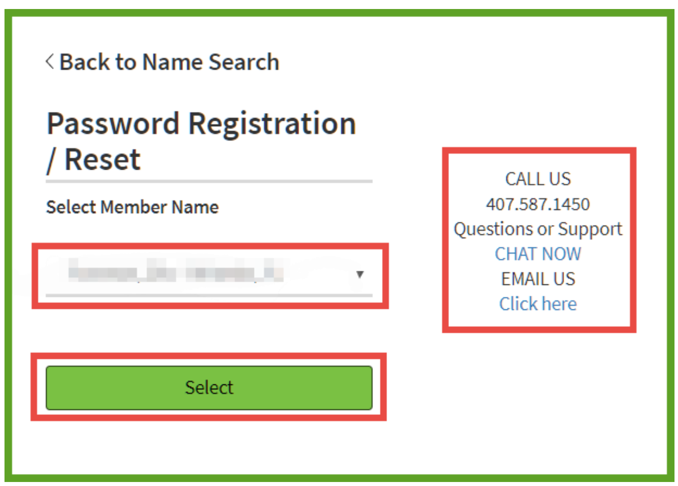
- Works on all mobile devices, access anytime, anywhere via the internet.
- Gives you quick access to the Form Library which is always current.
- Easy auto-fill tools reduce time spent typing data into the forms.
- Improve efficiency by creating form packages of your most frequently used forms.
- Store active and completed contracts and files online per state requirements (Up to 50MB of additional storage for additional documents is included. Transaction storage is limited.
- Share transactions online and collaborate with third parties in real time.
  Tech Helpline (another included Florida Realtors® member benefit) gives you complimentary training and support – Monday through Friday, 9:00 AM to 8:00 PM and Saturday and Sunday, 9:00 AM to 5:00 PM Eastern Time.

Registering for a Form Simplicity login

Registering for Form Simplicity varies among Form Simplicity's association, MLS and brokerage clients. The registration process should have been communicated upon the start date.







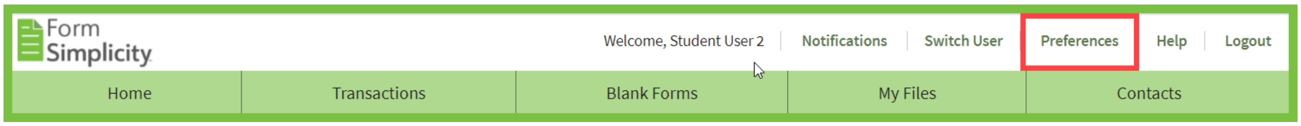
If you are having problems registering for Form Simplicity or have issues with your log in or logging in, please contact the Florida Realtors® Tech Helpline for assistance.

My Preferences: General Settings

Create a custom text email signature that will be automatically included in your outgoing Form Simplicity emails, collaboration invitations and for each eSign session that is created.

1. Log in to Form Simplicity.

2. On the upper right side of the page, locate and click on the "**Preferences**" link.



3. Set the ***Time Zone*** in your Form Simplicity account so that all times displayed within the application will match the user's selected time zone. Type your ***Email Signature*** in the field provided.

4. Once complete, click the **"Save Changes**" button.

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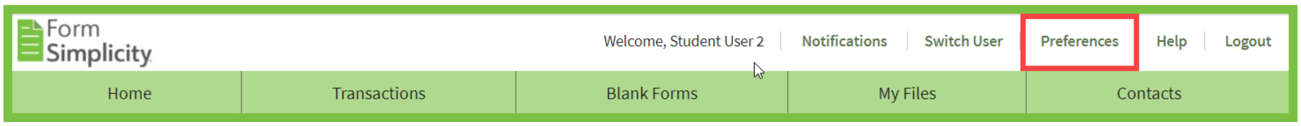
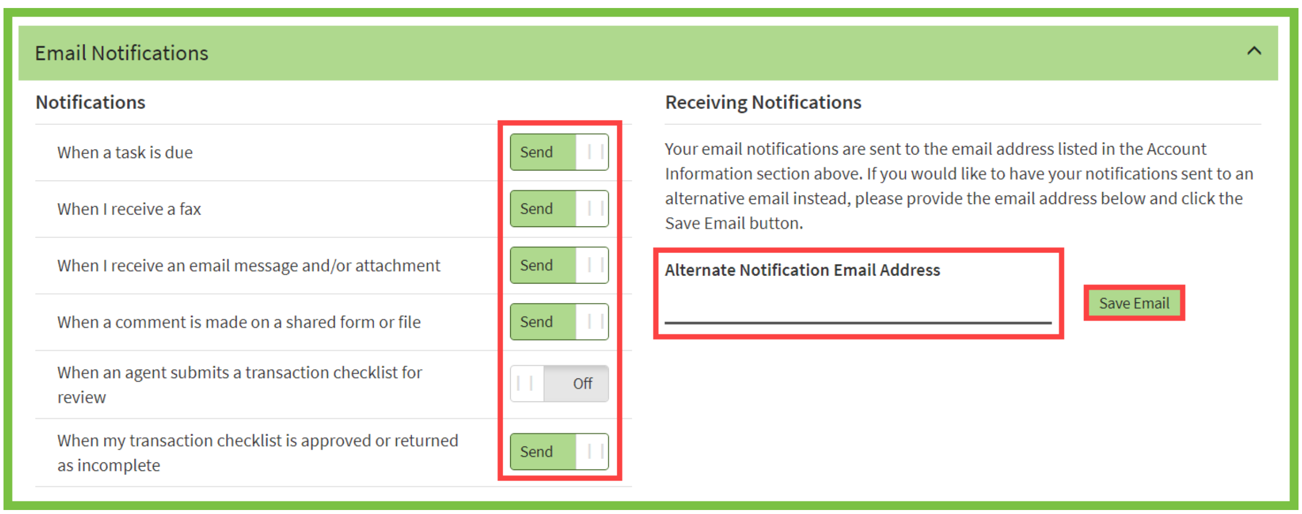
My Preferences: Email Notifications

You can make Form Simplicity work for you by having email notifications sent to the email address listed in the ***Account Information*** section. You can activate push notifications to your email address when using Form Simplicity's Email Notifications. Push notifications are email reminders for events such as task reminders, collaboration comments or broker file review notifications that arrive in your inbox. The notifications help to keep you on top of the paperwork and tasks related to your deals, leaving you free to conduct business.

1. Once you log into Form Simplicity, go to the upper right side of the Form Simplicity home page, locate, and click on the **"Preferences"** link.



2. Select the email notifications that you would like to receive by using the slider next to the various **Notifications** options in the ***Email Notifications*** section.



*Note: Email notifications are sent to the email address that is on file with your association. If you would like to have your notifications sent to a different email address, type it in the Email Address field and click the **"Save Email"** button.*

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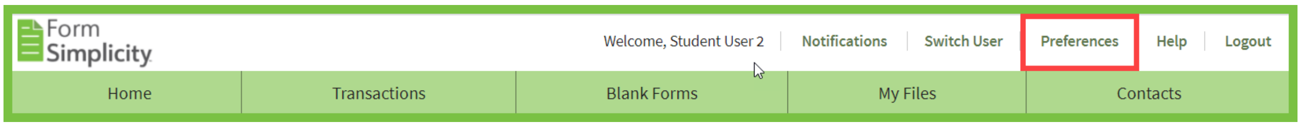
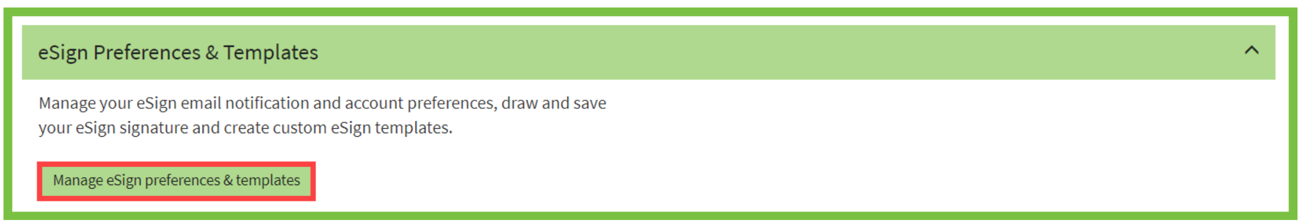
eSign Preferences & Templates: Personal Preferences

You can make eSign work for you by having email notifications sent to the email address listed in the ***Account Information*** section. You can activate push notifications to your email address when using eSign's ***Personal Preferences*** that will arrive in your inbox. The notifications will show you the progress of an eSign session.

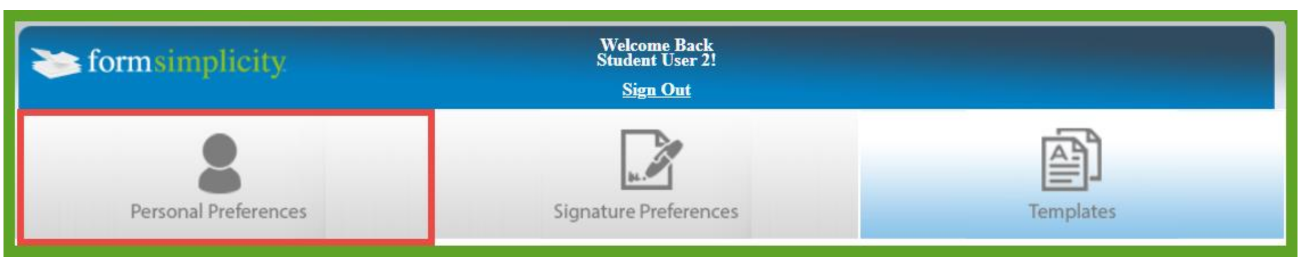
1. To manage your eSign email notification and account preferences, log in to Form Simplicity and click on the **"Preferences"** link in the upper right side of the Form Simplicity home page.



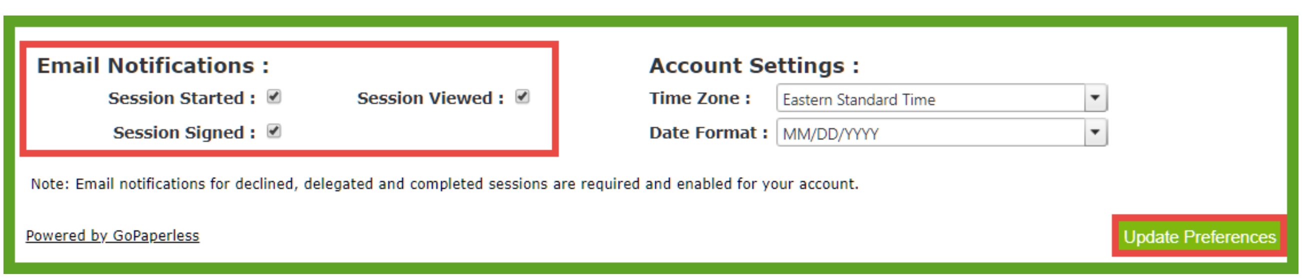
2. Scroll down to the ***eSign Preferences & Templates*** section and click on the "**Manage eSign preferences & templates"** button.



3. In the ***Personal Preferences*** section, you can select which emails are sent to you during the eSign session process.



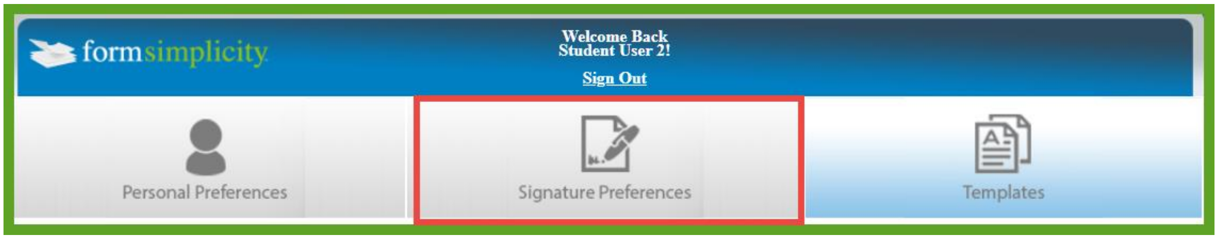
4. By checking/unchecking the ***Session Started*** and ***Session Viewed*** boxes, you can select which email notifications that you would like to receive during the eSign session process. *Note: The default Email Notification that is checked is* ***Session Signed****.* After you check the appropriate boxes, click on the **"Update Preferences"** button when done.



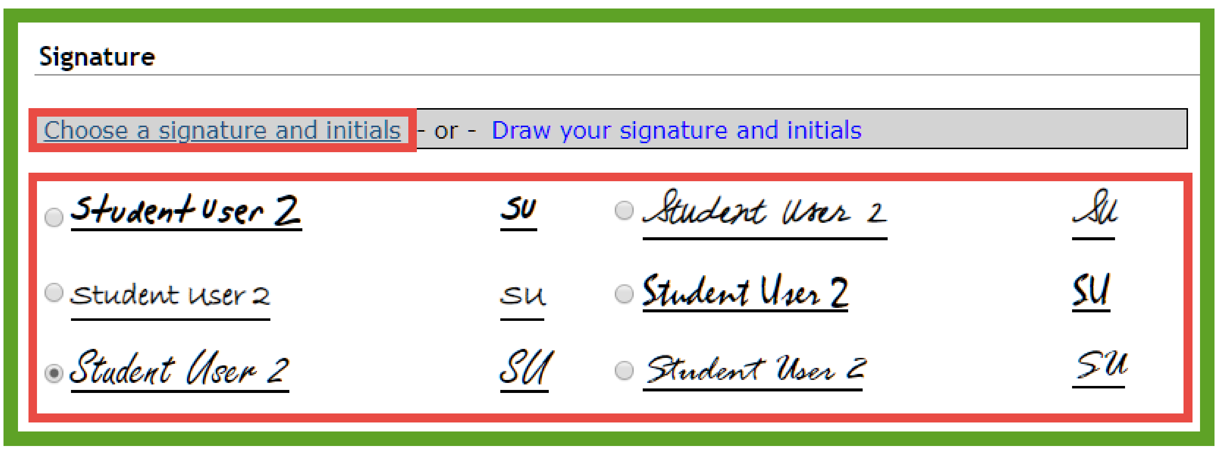
eSign Preferences & Templates: Signature Preferences

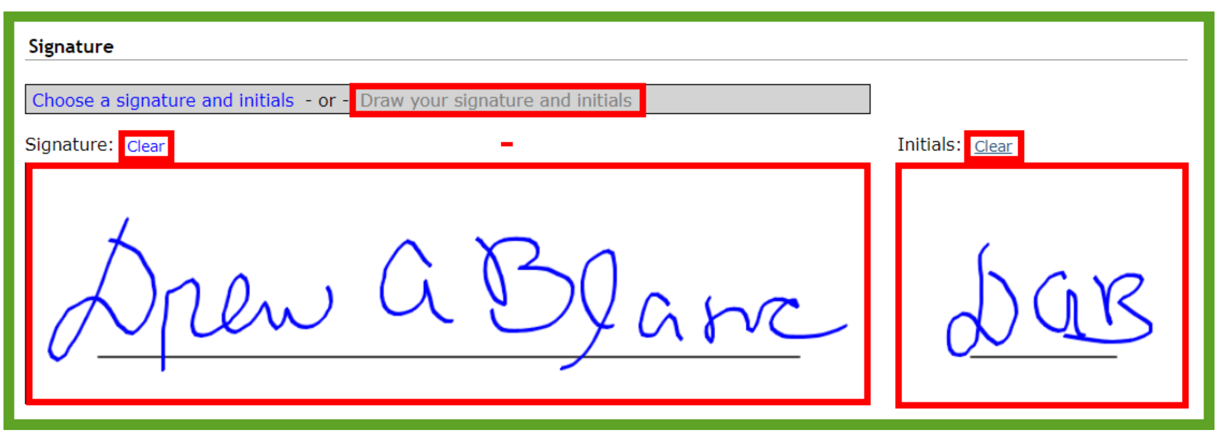
The Default Signature Font or Draw Your Signature can be set up and saved in ***Signature Preferences***. Just click and sign!

1. In the ***Signature Preference*** section, you will be able to select your default signature font when eSigning.



2. Below shows that you can either select **"Choose a signature font and initials"** or **"Draw your signature and initials"** when eSigning. You can also set up your email signature you send during the signing process. Then click the **"Update Preferences"** button when done.

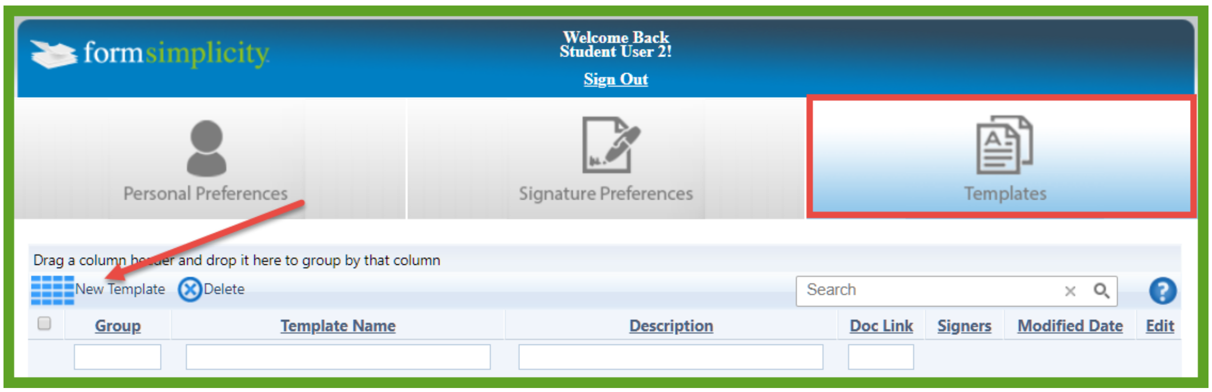




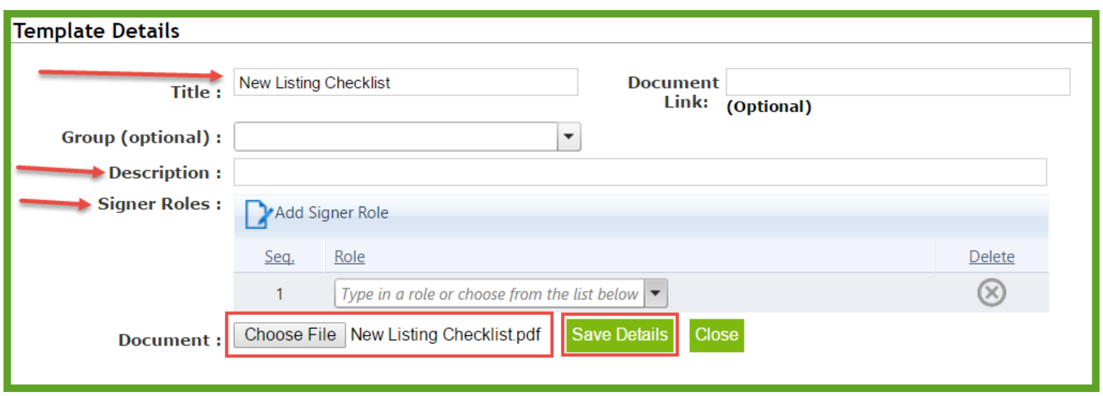
eSign Preferences & Templates: Templates

To create an eSign Template for each file you upload, make a list of how many initials, signatures, and date locations each signing role need to complete. *Note: The files must be PDF files and saved on your computer.*

1. Under the **"Templates"** section (3rd Box), click on the "**New Template**" icon.

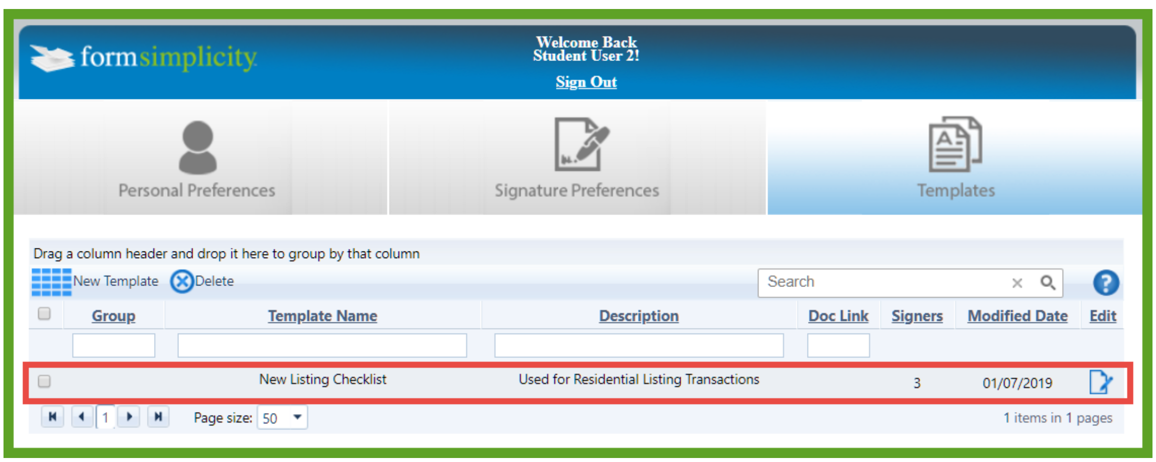


2. On the Template Details page: name the template, **Add Signer Roles** you will need for each signer for this particular file, upload the file by clicking the "**Choose File**" button, then click the "**Save Details**" button.



3. You will then be able to assign the fields on your file. Select the first person, then click and drag the appropriate block to the correct location on the form. Repeat the process for each person. To change persons, click on the drop-down menu on the top left corner. After you have assigned all the fields to your template, click "**Save**."

4. Form Simplicity will now know where to apply fields for that file.



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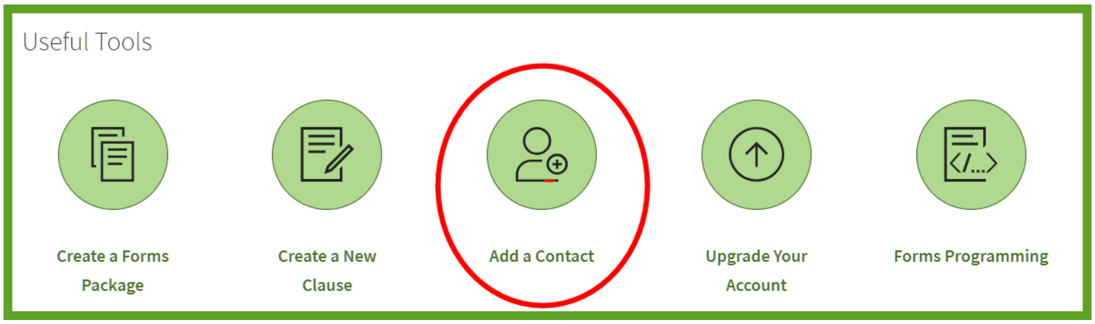
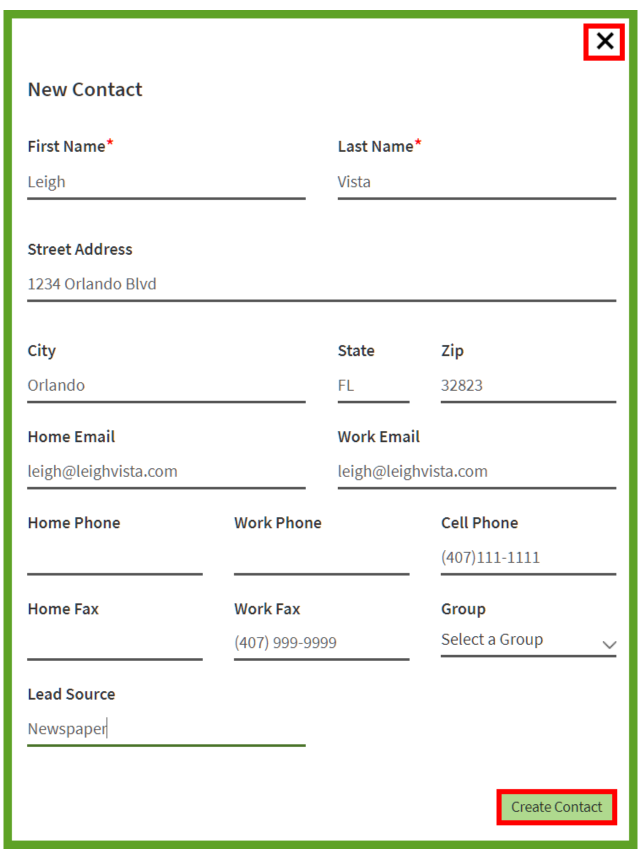
Contacts: Add a Contact

Add contacts in Form Simplicity so that you have a reference as to who is involved in a particular transaction, and to quickly populate your transaction forms, avoiding repeat data entry. Anyone can be a contact: a buyer, seller, an agent, or even you can be a contact. You can add contacts as needed to Form Simplicity for use on any transaction.

1. Click on the **"Add a Contact"** icon in the ***Useful Tools*** section on the bottom of the Form Simplicity home page.



2. Enter your contact's information in the ***New Contact*** screen, then click the **"Create Contact"** button in the lower right corner of the contact information record. If you wish to cancel, click on the **"X"** symbol in the upper right corner.



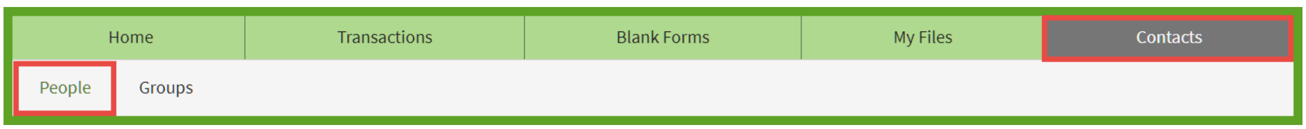
3. After your contacts have been created, click on **"Contacts"** from the main navigation menu at the top of the Form Simplicity home page. This will automatically open the **"People"** section.

4. You will see a list of your contacts that you have created.

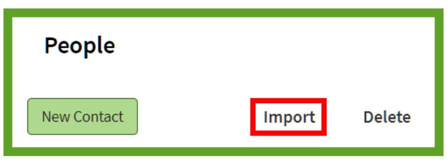
Contacts: Import Contacts

Import contacts into Form Simplicity so that you have a reference as to who is involved in a particular transaction and to quickly populate your transaction forms.

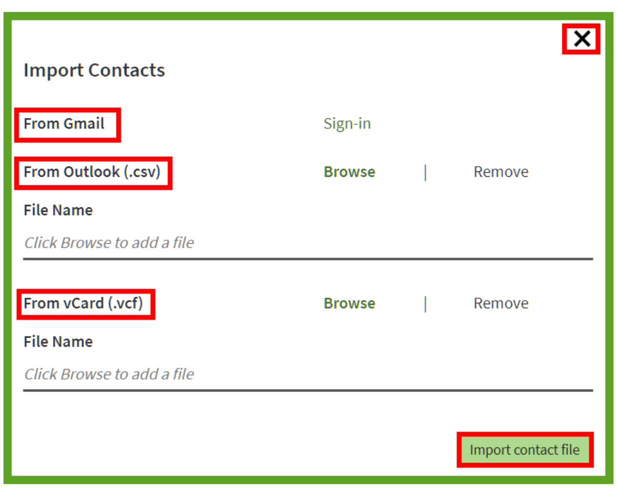
1. Log in and select **"Contacts"** from the main navigation menu at the top of the Form Simplicity home page. This will automatically open the **"People"** section.



2. You can import your contacts from different email programs by clicking on the "**Import"** link.



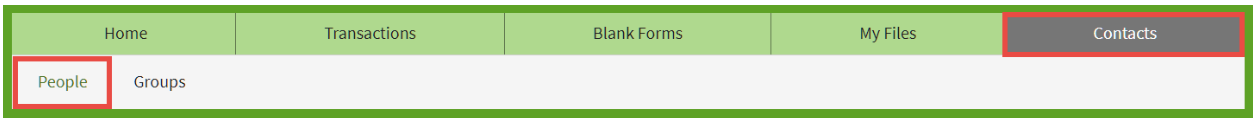
3. The three sources are:
   - Your Gmail Account
   - Your Outlook Contacts
   - Your vCard Contacts



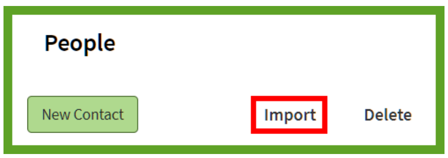
4. After importing from any of the above sources, click on the **"Import contact file"** button in the lower right corner of the ***Import Contacts*** screen. If you wish to cancel, click on the **"X"** symbol in the upper right corner.

Contacts: Import Contacts - Gmail

1. Log in and select **“Contacts”** from the main navigation menu at the top of the Form Simplicity home page. This will automatically open the **“People”** section.

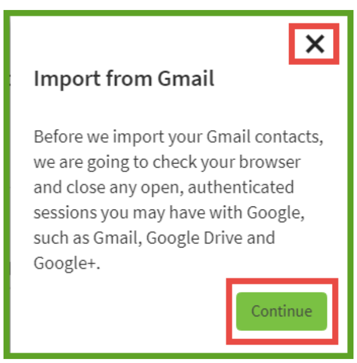


2. Click on the **“Import”** link.

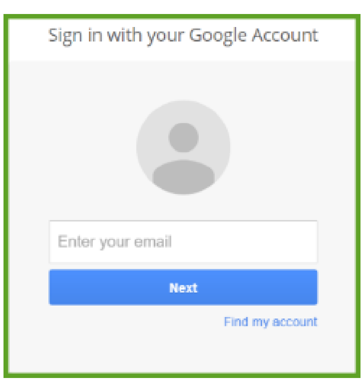


3. Click on the **“Sign-in”** link to the right of ***From Gmail***.

4. The following window will close any associated Google sessions that are opened. Click **“Continue”** or **“X”** to cancel.



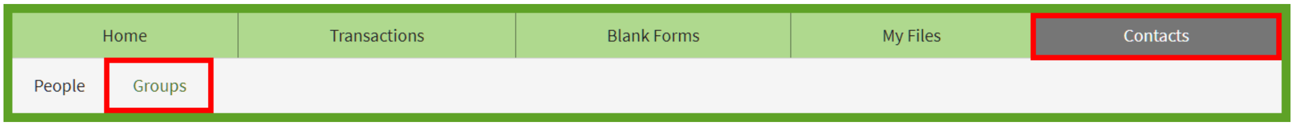
5. Enter your Gmail address and password, then click the **“Next”** button to import all your Gmail contacts into Form Simplicity.



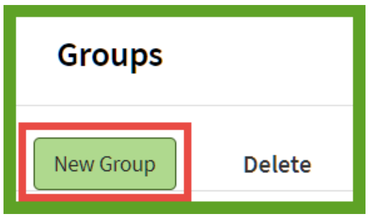
Note: <u>This is not a Data Sync.</u> This is a one-way import of the Google contacts. If a change is made in one location in the future, it will not automatically sync to the other.

Groups: New Group

1. To create a group name, log in and select **“Contacts”** from the main navigation menu at the top of the page. Then click on **“Groups”** in the ***Contacts*** secondary navigation menu.



2. Click on the **“New Group”** button in the **“Groups”** window.



3. Assign a name to your group and click the **“Add Group”** button.

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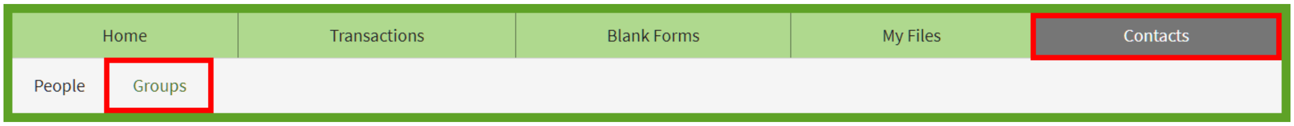
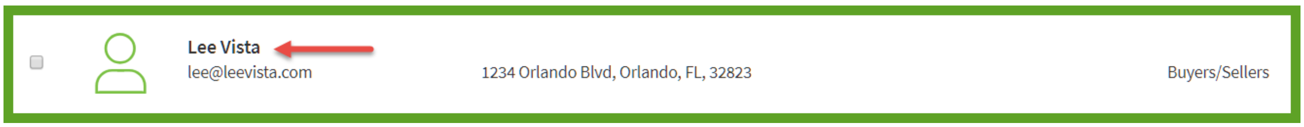
Groups: Add Contacts to Your Group

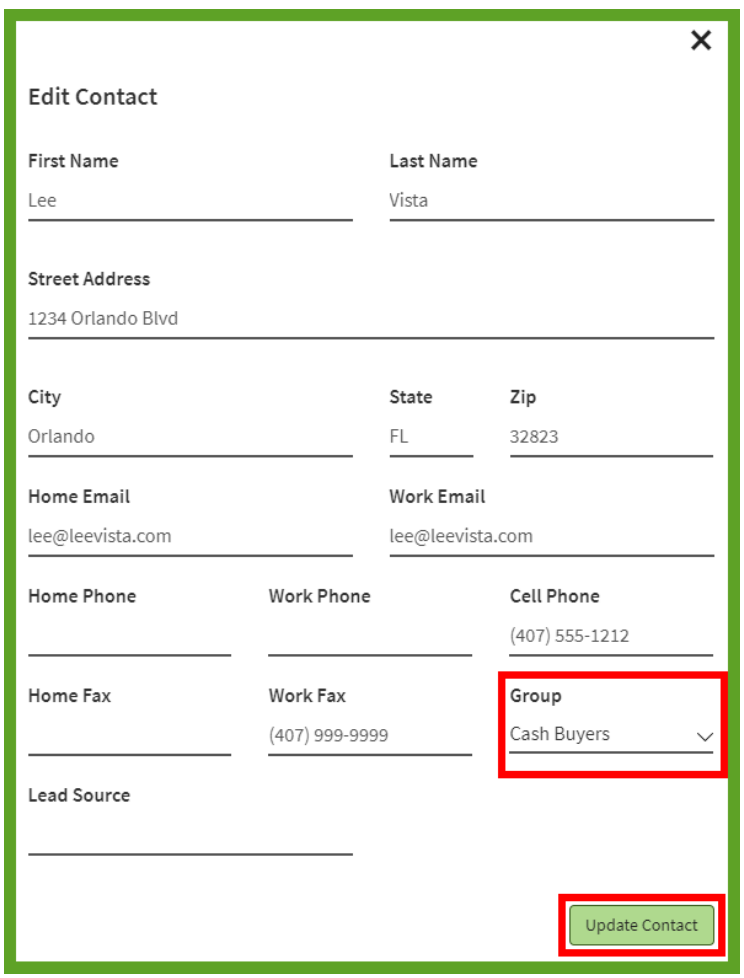
1. Switch from **“Groups”** to **“People”** in the ***Contacts*** secondary navigation menu.



2. Locate the contact you wish to assign to a group and click on their name.



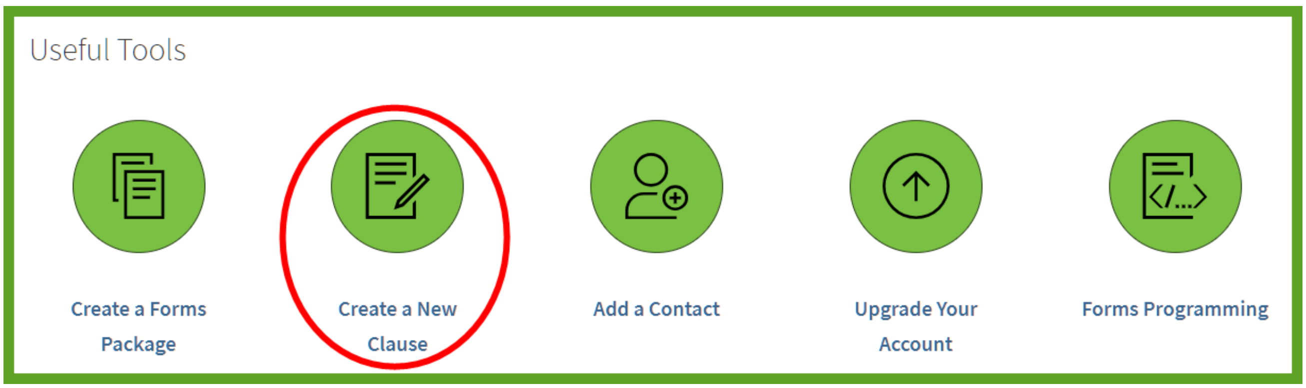
3. Once you locate the contact, click on their name to open their contact information. Go towards the bottom right of the contact record and click on the **“Group”** drop-down and select a group. After you selected a group for your contact, click on the **“Update Contact”** button on the lower right corner of the contact information window.



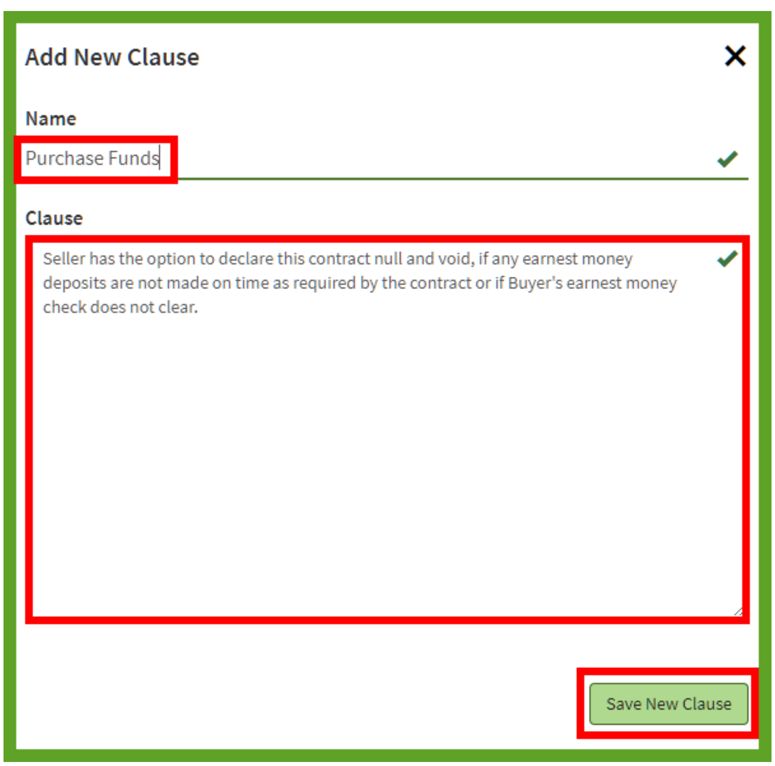
Clauses: Create a New Clause

Creating clauses will save you time by saving the phrases or wording you use for Form Simplicity transactions. You can create standard clauses in Form Simplicity that can be reused in multiple forms. Clauses can be created by the agent for their own personal use or by the broker for the other agents in the office to use. Apply the clause when opening your form and adding it to a field with just a couple of clicks.

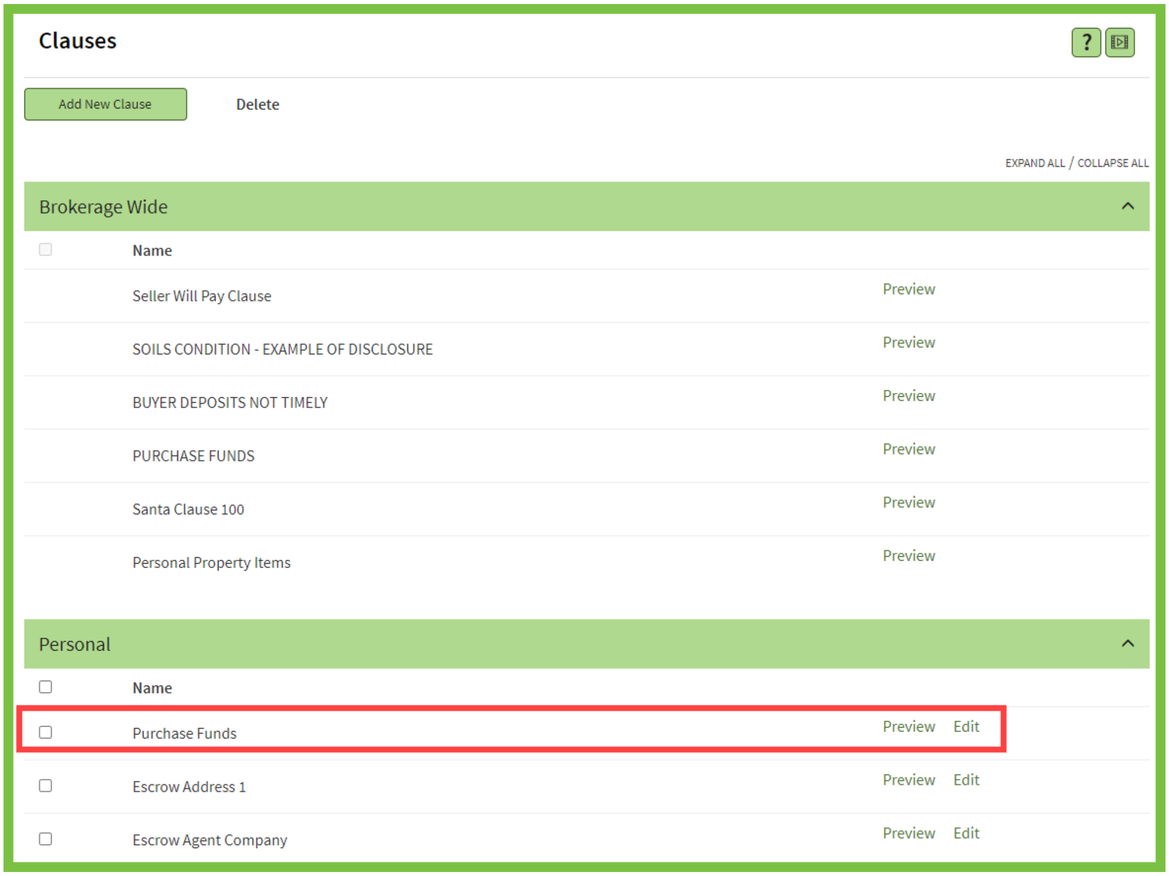
1. The quickest way to create a clause is to click on the **"Create a New Clause"** icon under the ***Useful Tools*** section on the bottom of the Form Simplicity home page.



2. This method will take you directly to the **"Add New Clause"** screen. Enter the name, the text of the clause, and click **"Save New Clause."** *Note: You may repeat the process and create as many clauses as you need.*



3. After creating a clause, you will find them stored under the ***Personal*** section for you to preview, edit, or delete by clicking on **“Clauses”** from the ***Blank Forms*** secondary navigation menu at the top of the page.

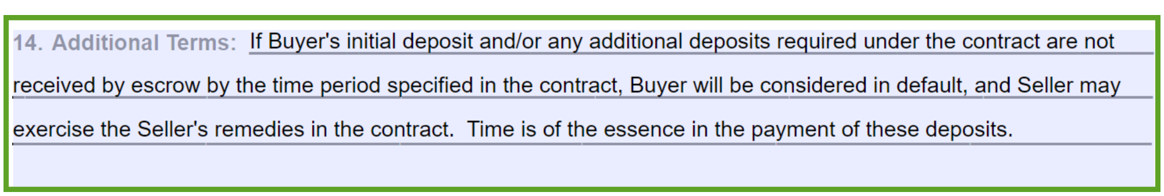


Clauses: Insert Clause

1. Log in and open the form in your active transaction that you wish to insert the clause on.

2. Click on the drop-drop on the top left corner and select the name of the clause you would like to insert. Locate the section on the form where the clause will be inserted. Look for the drop-down arrow and the **“Insert Clause”** button above the form.

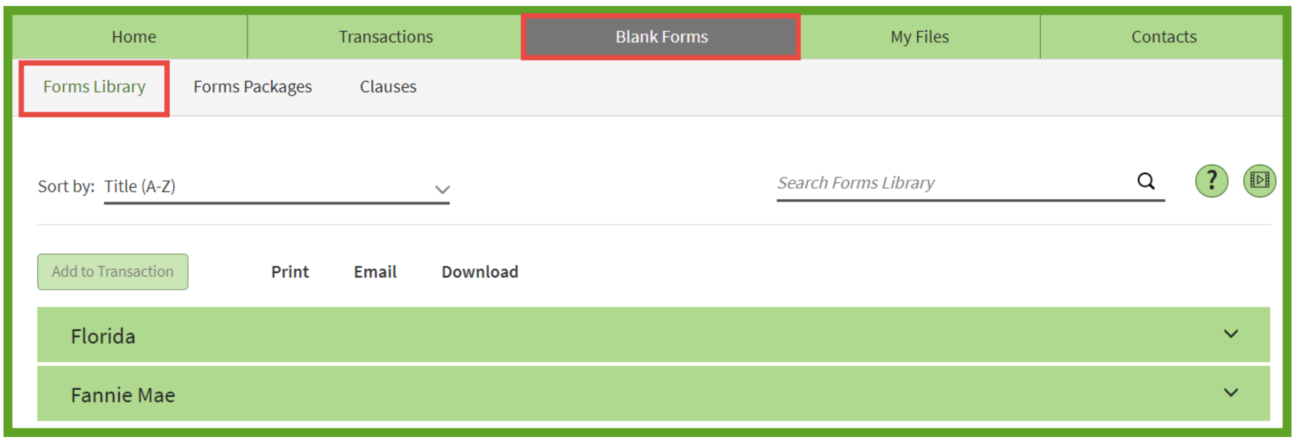
3. Select a clause for the list of clauses in the drop-down menu. Then click on the line where you would like to insert your clause. Click on the **“Insert Clause”** button and that clause has been inserted into the form.



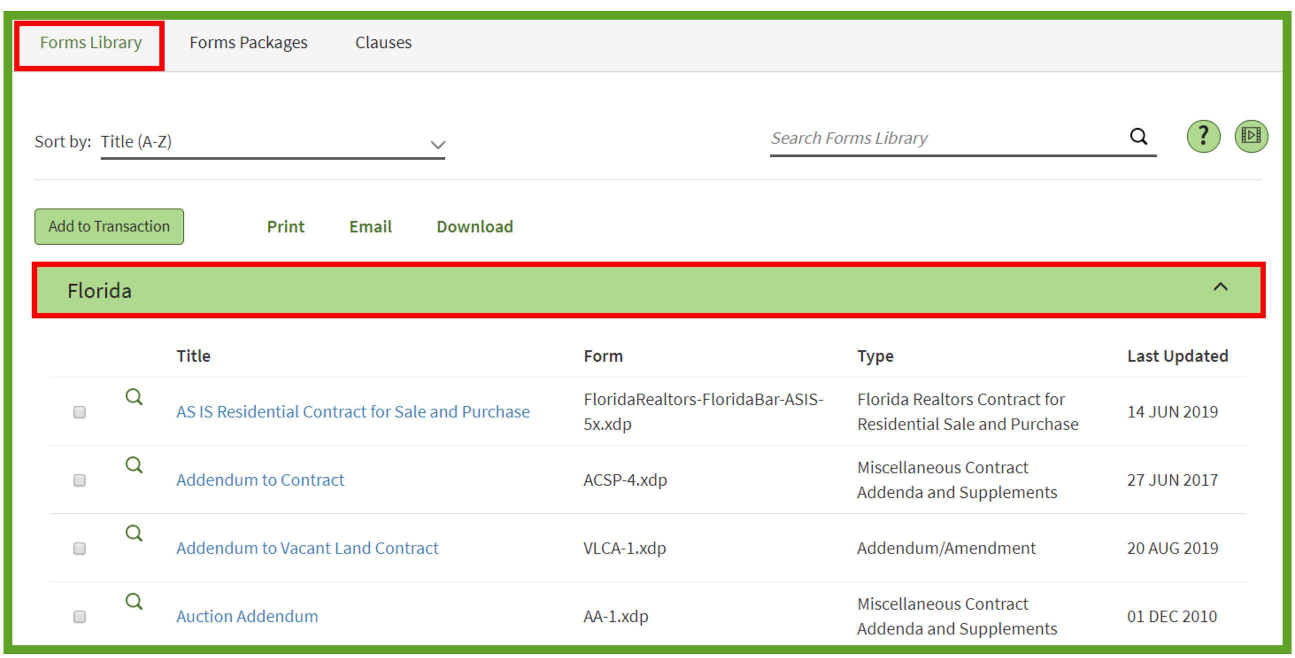
Forms Library: Retrieving Forms

Forms represent legal contracts that are filled out interactively online. They are usually provided by your board, association, or broker, which has been programmed by Form Simplicity to ensure compliance. Learn how to navigate your Library of blank forms. Take a closer look at the unique features of Form Simplicity's smart forms.

1. Start by clicking on **"Blank Forms"** from the navigation menu bar at the top of the Form Simplicity home page. This will automatically open the ***Forms Library*** section and take you to the ***Blank Forms*** library.



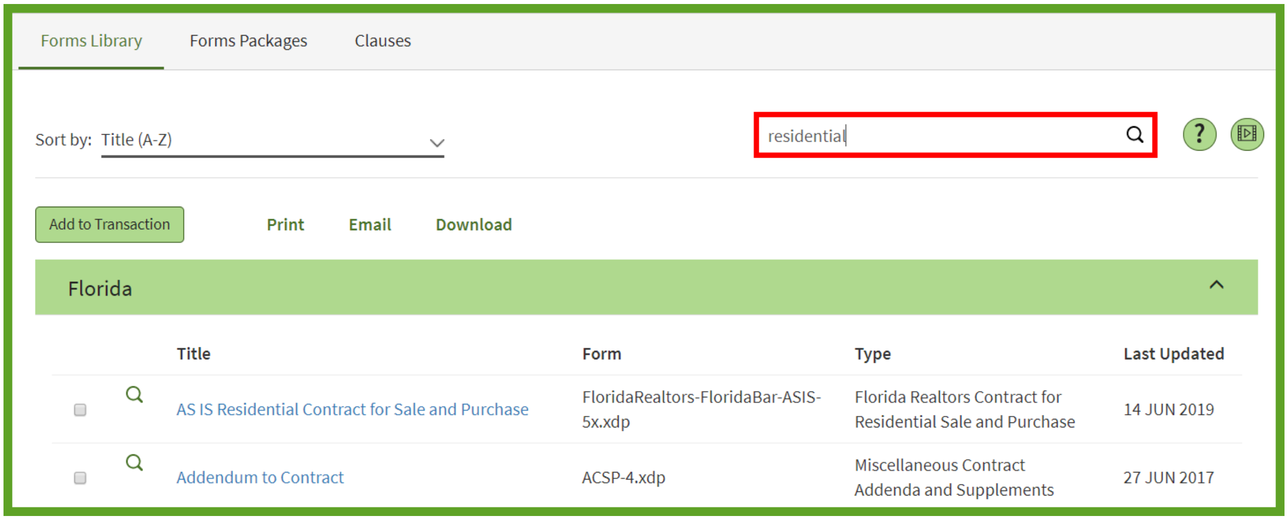
2. In the ***Forms Library*** screen, click on the section header on the forms library you would like to open. You can scroll up and down the screen and try to locate the form(s) that you are looking for in a specific library.



Forms Library: Search Forms

1. Type the keyword in the **"Search Forms"** search bar, then click the **magnifying glass**.

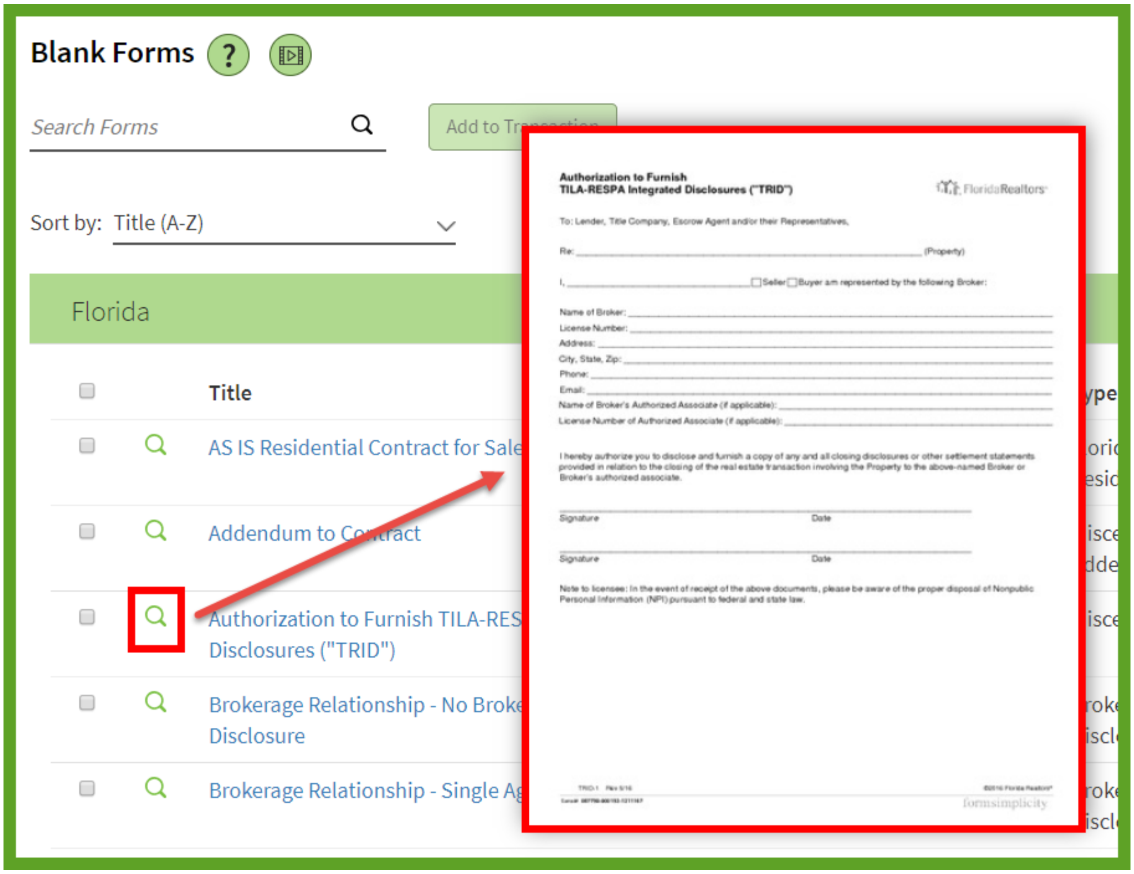
   Note: Limit your search to one keyword (e.g. residential) for best results.



2. Your search results will appear with all the forms that have the keyword you typed. Just click on the name of the form to open it.

Forms Library: Preview a Form

Find the form you would like to preview and click the "**magnifying glass**" icon to the left of it. An image of the form will open for you to preview it. Click on anywhere on the screen to close it.



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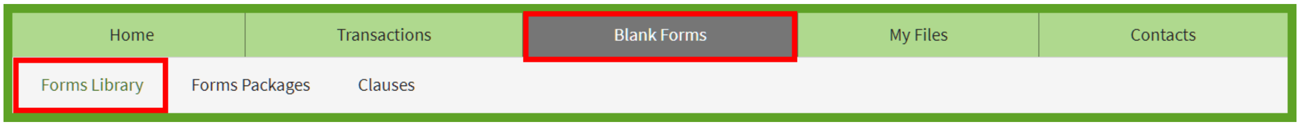
Forms Library: Print

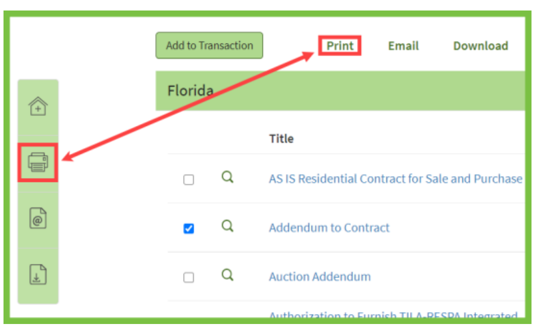
Print a form when you need to work with a hard copy of the form. If you are working with another broker that is not working in a paperless office or a client who does not want to use an electronic signature program, you can print the required forms for them to sign and send back.

1. Start by clicking on **"Blank Forms"** from the navigation menu bar at the top of the Form Simplicity home page. This will automatically open the ***Forms Library*** section and take you to the ***Blank Forms*** library.

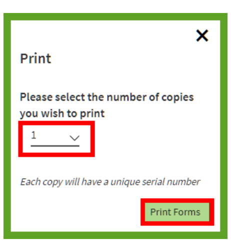


2. Your **Blank Forms** library will open. Select the form(s) you need by placing a check mark in the box to the left of the form's name.

3. Then click on **"Print"**, which is located at the top right corner of the **Blank Forms** page. *Note: You can also click on the **"Printer"** icon on the Floating Toolbar on the left side.*



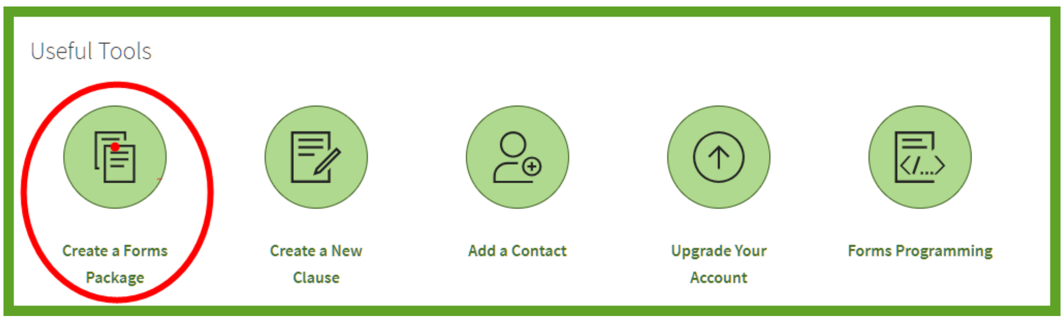
4. In the ***Print*** window, you have the option of selecting how many copies you wish to print. Then click the **"Print Forms"** button to confirm or click the **"X"** to cancel the action.



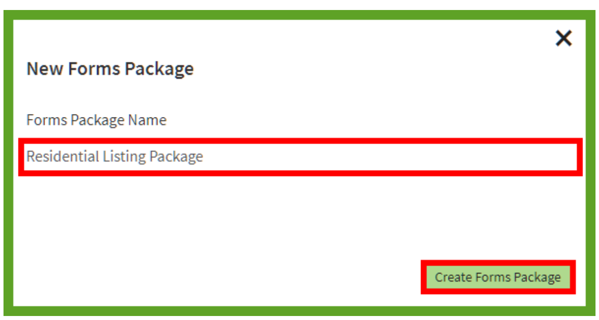
Forms Packages: Create a Forms Package

A form package defines a standard set of forms and files that simplify the process of creating a transaction, e.g., you have certain forms and files required for a Residential Listing. You can create the forms package called "Residential Listings" and attach the forms and files to it. Then, each time you create a transaction for a residential listing, you only need to apply the Residential Listings Forms Package: All of the forms and files will be automatically added to the transaction.

1. The quickest way to create a form package is to log in and click on the **"Create a Forms Package"** icon on the bottom of the Form Simplicity home page.

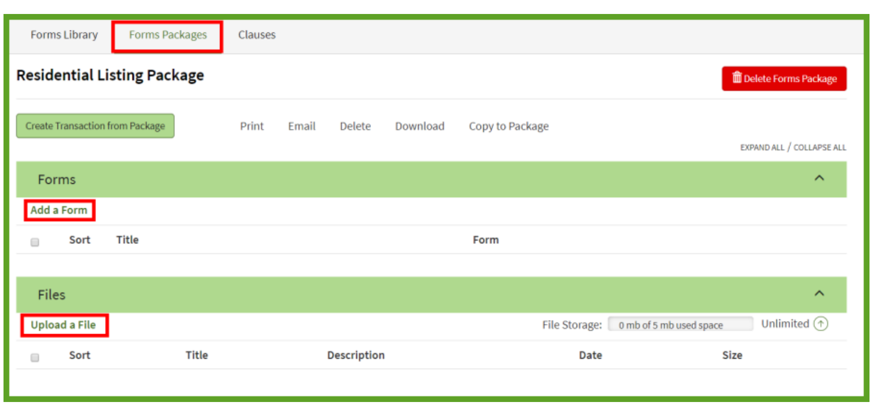


2. Name the package (i.e. *Residential Listing Package*), and click **"Create Forms Package."**



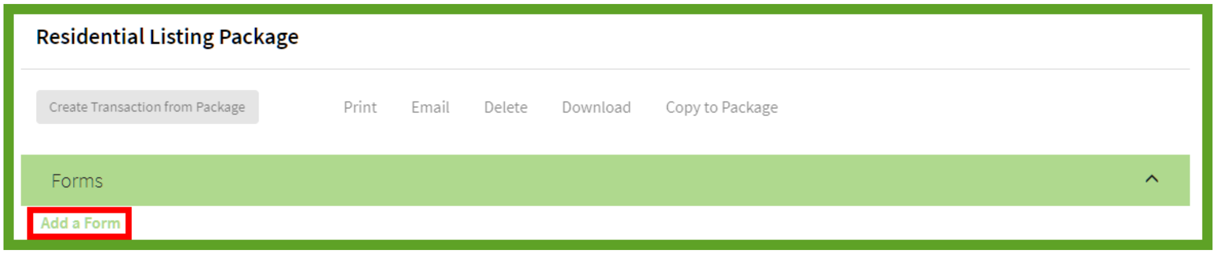
Note: At this point, your folder will be empty. Add forms to your package next.

3. In the ***Forms Package*** section, you will need to **"Add a Form"** and **"Upload a File."**

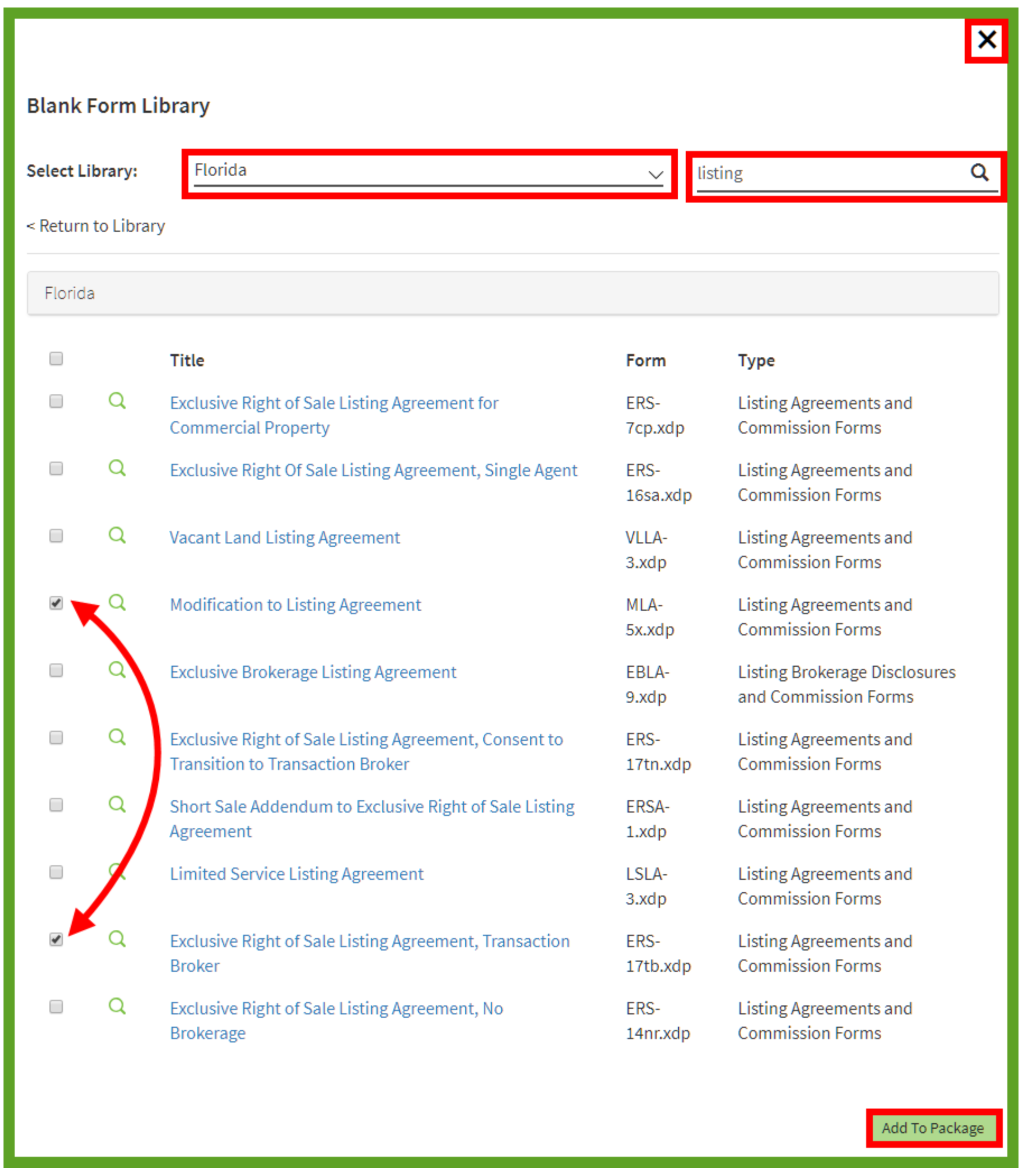


Add Blank Forms to the Package

4. Click on **“Add a Form”** located below the ***Forms*** section.

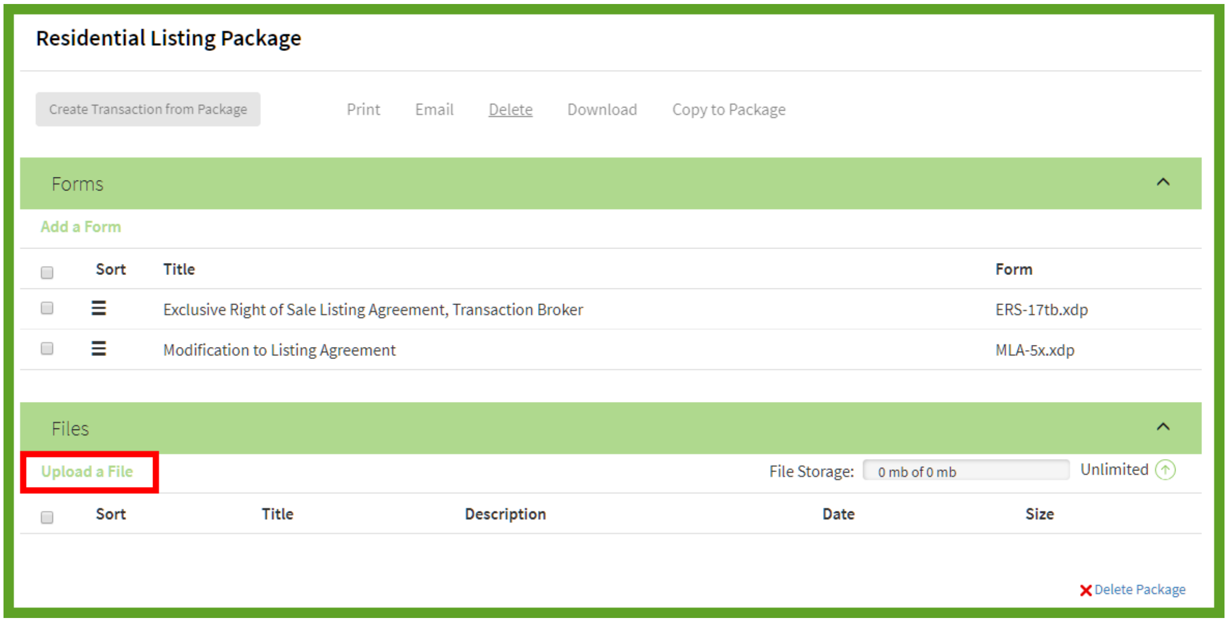


5. When the ***Blank Form Library*** window opens, click on the **“Select a Library”** drop-down arrow to select a library of forms; e.g., Office, State Association, Local Association form libraries. **Place a check mark** next to the forms that you want to add to your package, click the **“Add To Package”** button. The forms you selected will now be available in your package.

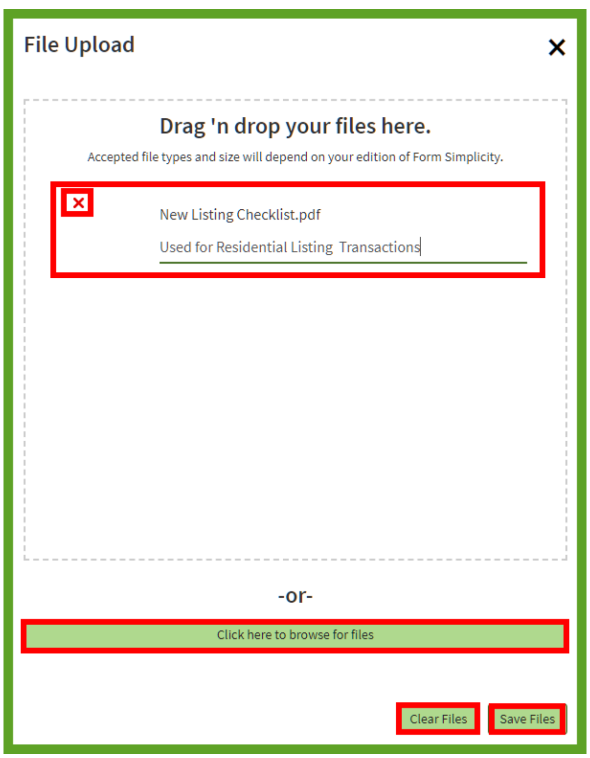


Upload Files to the Forms Package

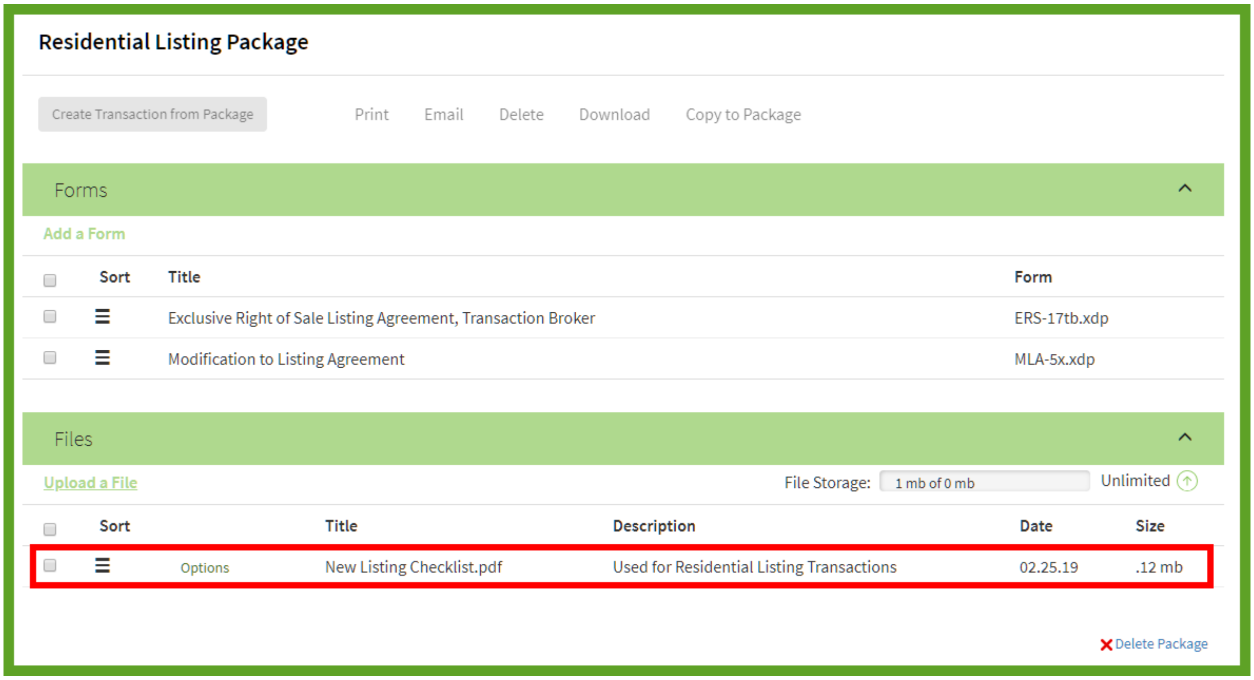
6. After adding your forms to the ***Forms*** section of the package, then under the ***Files*** section, click **"Upload a File."**



7. You can access your files from your computer by using the **"Click here to browse for files"** button to **"Drag 'n drop your files"** in the ***File Upload*** window. Locate the file, give it a description if you wish and click the **"Save Files"** button. Click on the **"X"** to remove a specific file. If you want to remove all the files, then click on the **"Clear Files"** button.



8. The file you uploaded will now be listed under the **"FILES"** section of your package.



Note: Files that are uploaded are static: not editable and will not auto-populate data.

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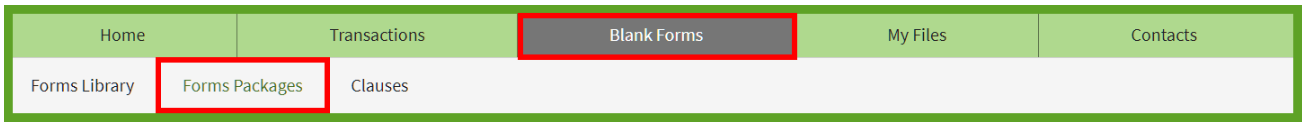
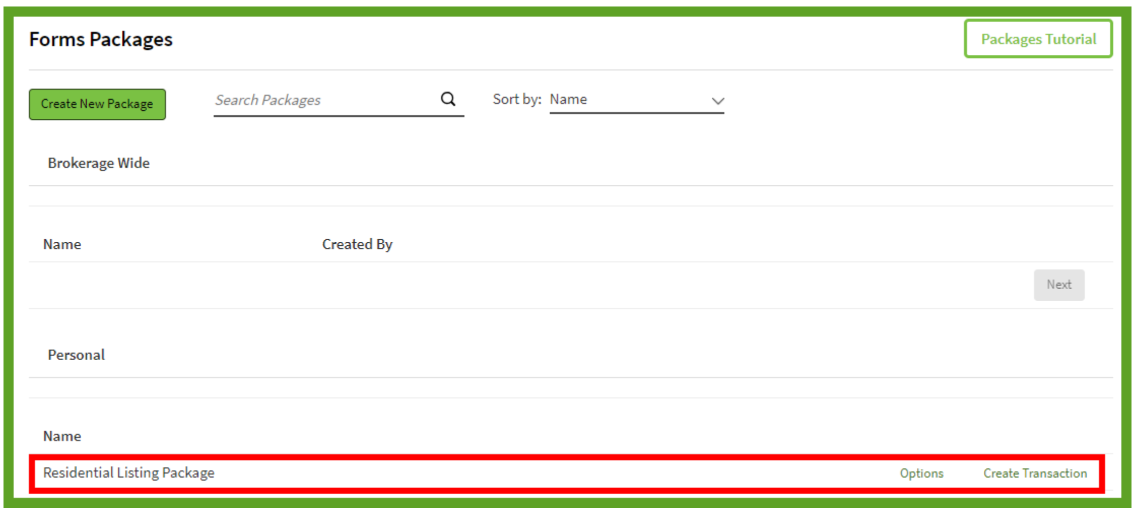
Forms Packages: Copy to Package

This time-saving feature allows you to copy Form(s) and/or Files from one existing package to another existing package.

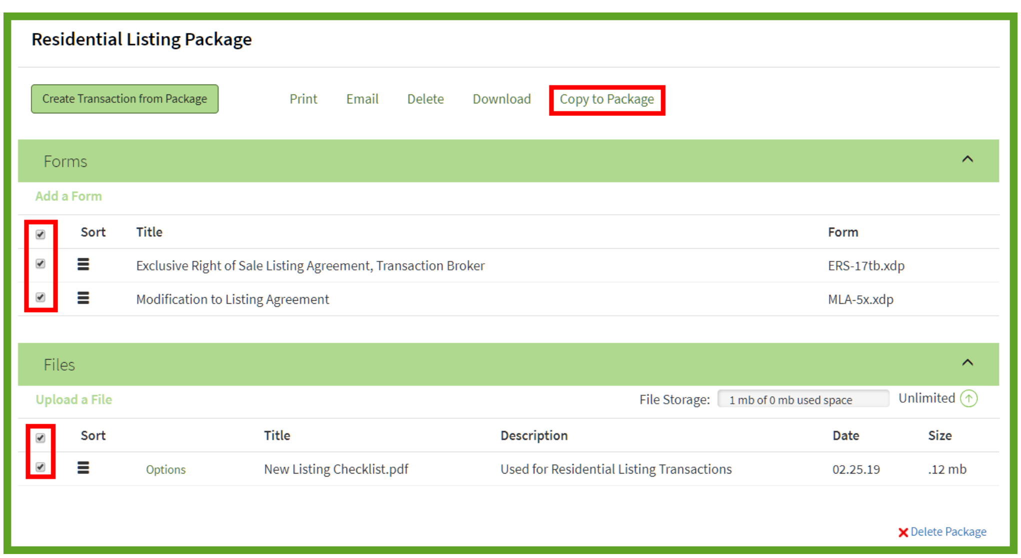
1. Log in and click on **"Blank Forms"** from the main navigation menu at the top of the page. Then select **"Forms Packages"** from the **Blank Forms** secondary navigation menu.



2. Click on the package name to open the package that contains the Forms and Files you wish to copy.

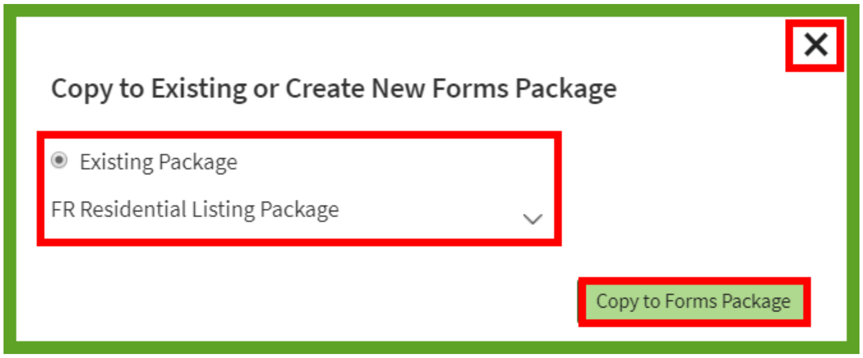


3. Click on the check box(es) to select the Forms and Files you wish to copy to another existing package. Click on "**Copy to Package**".

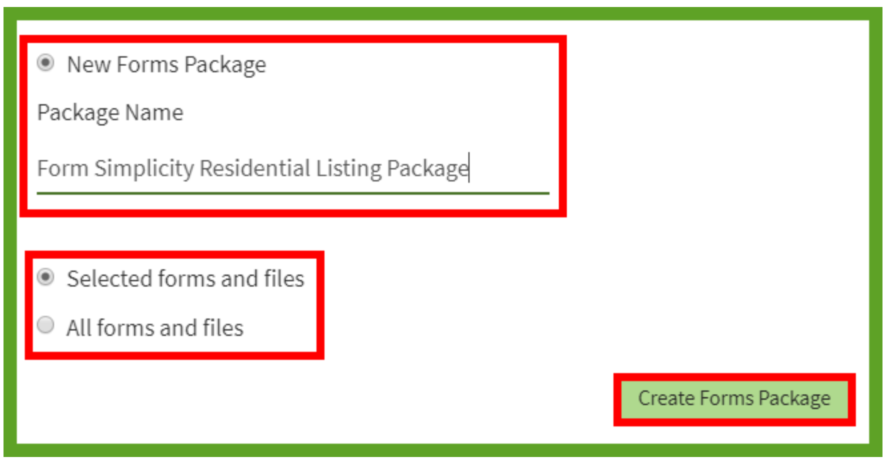


4. In the ***Copy to Existing or Create New Forms Package*** window, you have two options:

   a. Under **Existing Package** (which is the default option), click on the "**Select a Package**" drop-down arrow to select the Existing Package to where you wish to move the forms and files. Then click on the **"Copy to Forms Package"** button.



   b. Under **New Forms Package**, click on **"Provide Forms Package Name"** to create a New Forms Package where you wish to move the forms and files. Then click on the **"Create Forms Package"** button.



Note: Whether you select the Existing Package or create a New Forms Package, click on the radio button to select whether you wish to move only specific forms and files or all the forms and files.

The forms and files in the package you selected will be copied to the existing package you selected.

Please note:

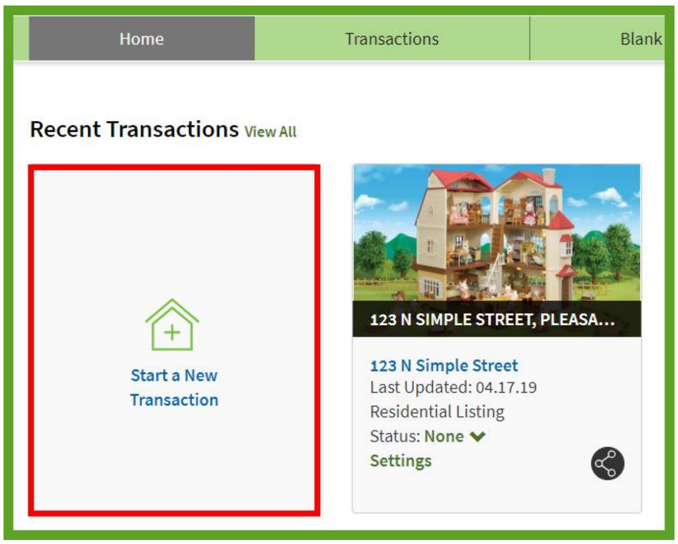
Global data contained within the forms being copied over will only be saved into the destination package (the existing package where the forms are being copied ***into****) if there is no current information in that field of the destination package, e.g. Brokerage name.*

Otherwise, global data located in the destination package will override global data contained within the forms being copied over.

Transactions: Start a New Transaction

You can start a new transaction manually, where you manually provide all the transaction information. You can also use an MLS listing or the tax data record to automatically populate many of the fields in the transaction, decreasing the time it takes to add a transaction manually. This will be shown under **Import Property Data** feature.

1. Log in and click on the **"Start A New Transaction"** icon from the Form Simplicity home screen. It will automatically take you directly to the ***New Transaction*** screen as seen in Step 2.



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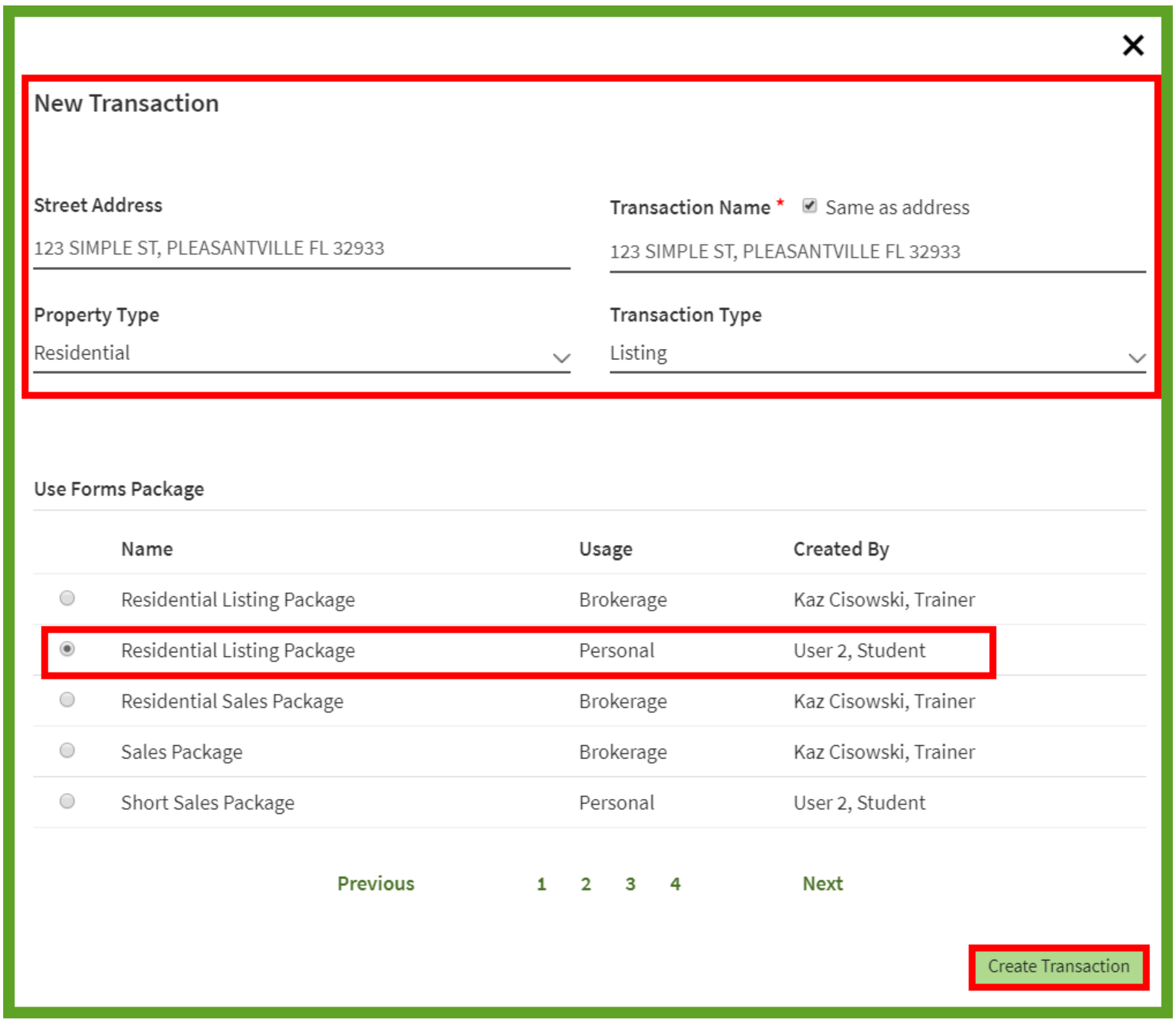
2. In the first part of the ***New Transaction*** window, enter the **Street Address** and assign a **Transaction Name** both are required to activate the **"Create Transaction"** button. Then, select a **"Transaction Type"** (Listing, Purchase, Listing & Purchase, Lease/Rental) and a **"Property Type"** (Residential, Commercial, Farm and Ranch, and Vacant Land). *Note: The check box will allow you to quickly name the transaction to be the same as the street (property) address.*

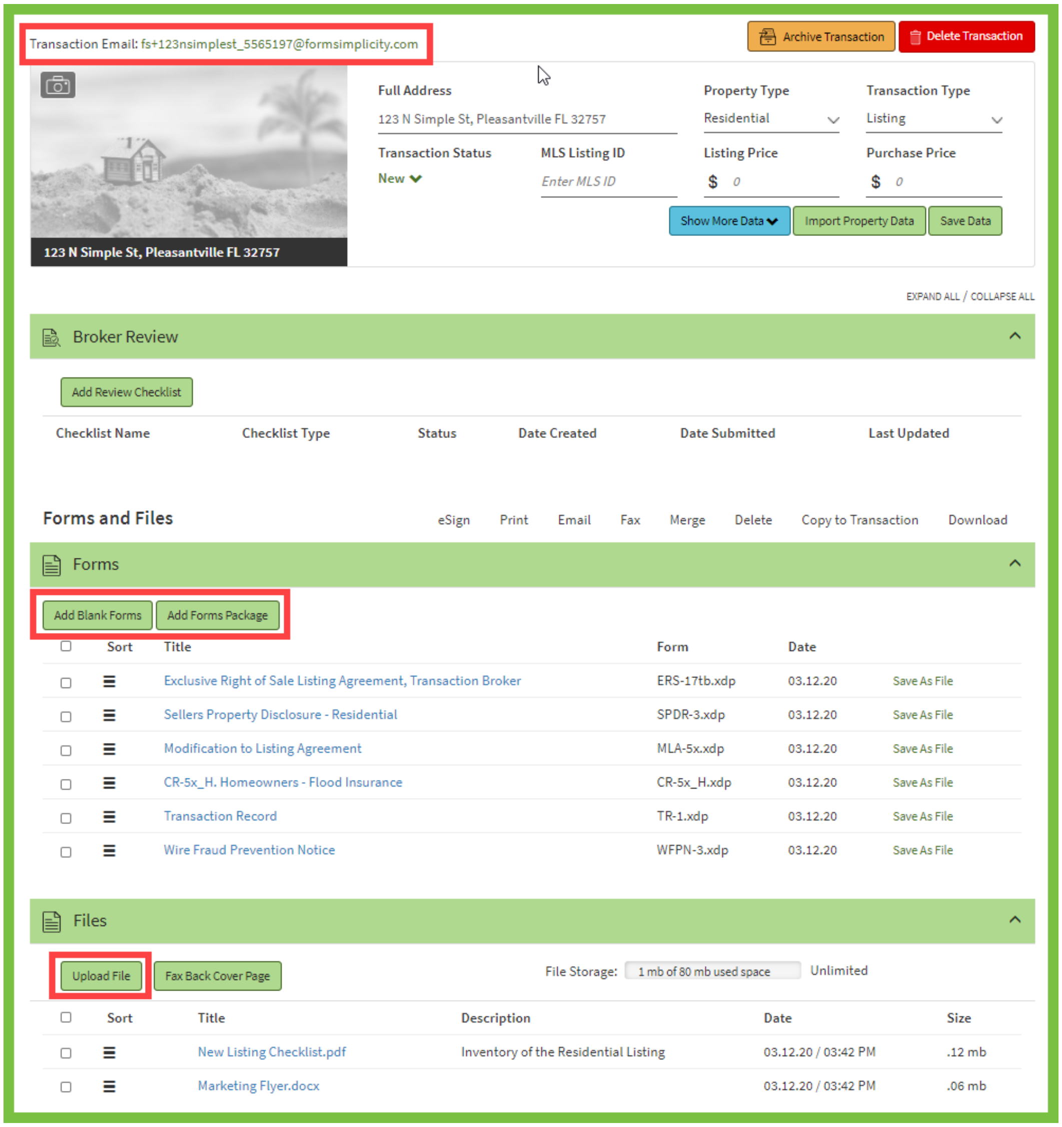
3. Under the ***Use Forms Package*** section of the ***New Transaction*** window, click on the corresponding radio button of the forms package that you will be using to create your transaction. *Note: If there are no form packages created, you will have to manually add forms from the Blank Forms Library once the transaction folder has been created.*

4. Then, click the **"Create Transaction"** button.



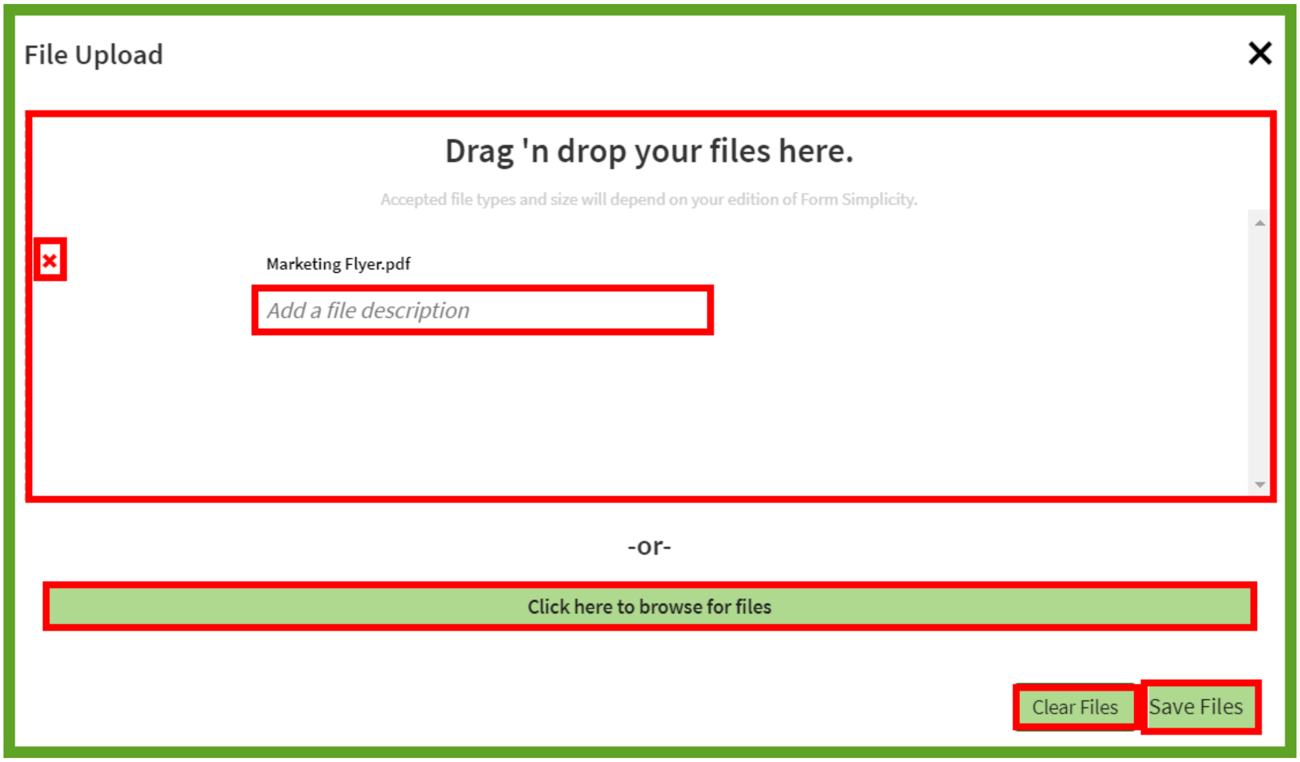
5. Your new transaction record will be created with a copy of the forms and files from the package you selected. *Note. You are not restricted to using only the forms and files that came with the package. You may continue to add forms or files as needed.*

6. To add more forms to your transaction, click on **"Add Form"** in the ***Forms*** section. In the ***Add Form*** window, select either "**From the Blank Forms Library"** or **"From a Form Package."**



7. To upload additional files, click the **"Upload File"** button. In the ***File Upload*** window, click on the "**Click here to browse for files"** button. Then use the **"Drag 'n drop your files here"** feature. *Note: You can add a file description below the file name. To delete the uploaded file, click on the* **"X"**.

   To upload the additional files to the transaction, click on the **"Save Files"** button. *Note: To clear all the files in the* ***File Upload*** *screen, click on the* ***"Clear Files"*** *button.*



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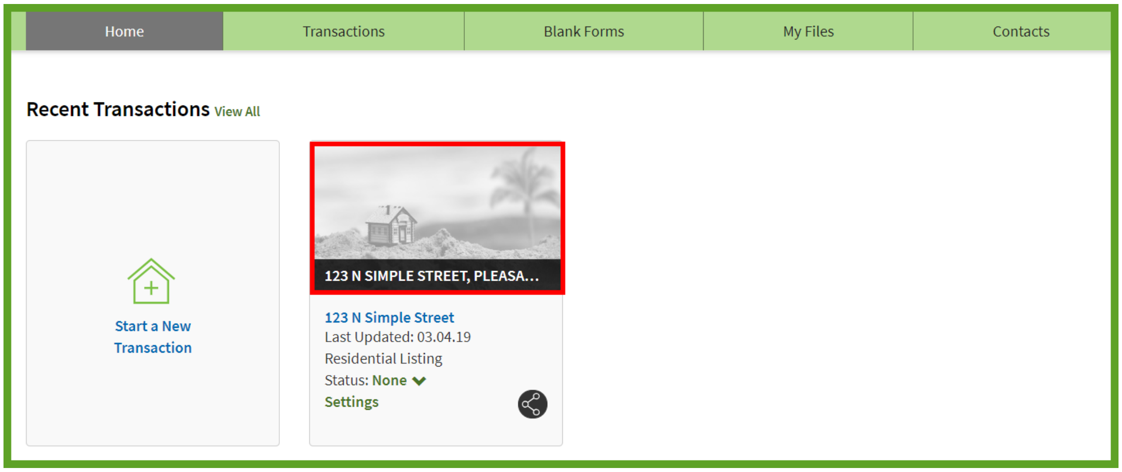
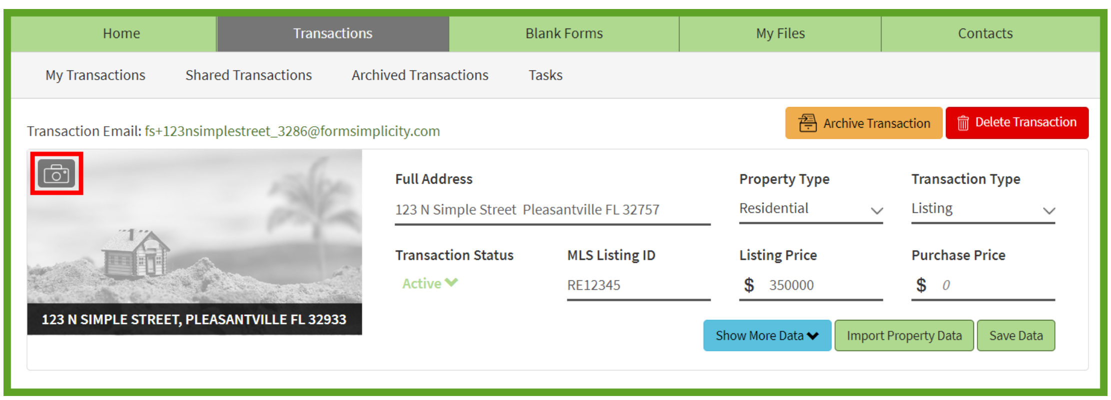
Transactions: To Add a Property Photo

1. Log in and select a transaction either from the home screen or by clicking on the **"Transactions"** button on the main navigation menu and selecting from **"My Transactions"** secondary navigation menu, click on the transaction you wish to add a property photo.



2. Click on the camera button in the left corner of the generic photo to update the property photo.



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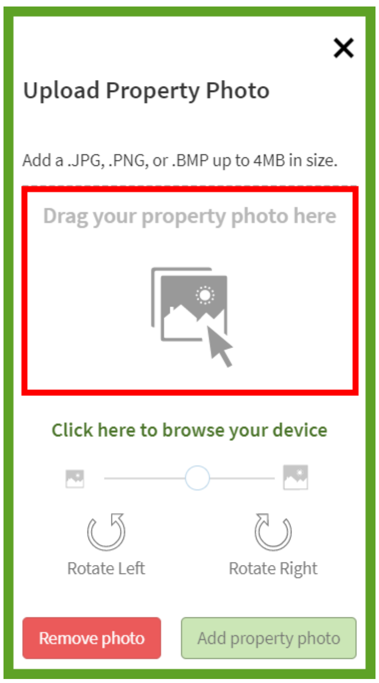
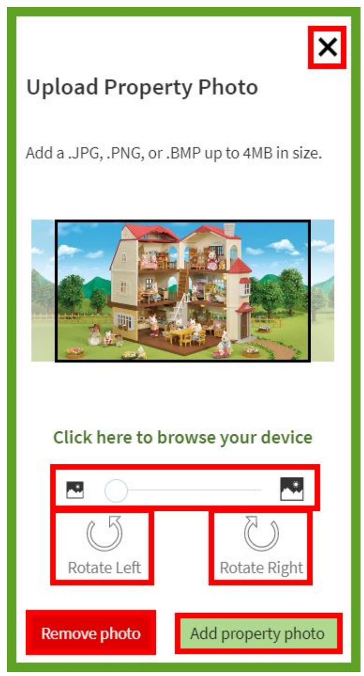
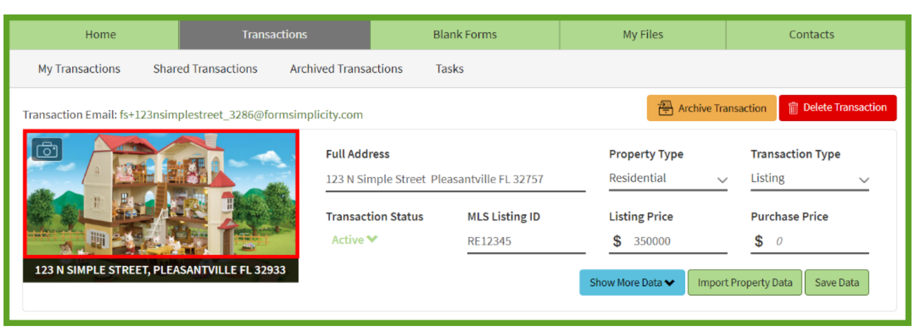
3. In the ***Upload Property Photo*** window
   a. Click on the **"Click here to browse your device"** link to locate your property photo on your device. Select the photo and click on the **"Open"** button on the browser's ***Open*** window. *Note: You can also Drag and Drop your photo into the photo frame.*
   b. Click on the **"Zoom In/Zoom Out"** slider to adjust your photo to fit within the confines of the photo frame.
   c. Click on either the **Rotate Left** or **Rotate Right** buttons until the photo is rotated to your preference.
   d. Click on the **"Remove photo"** button to either remove the photo from this window or remove the wrong photo that was uploaded. A window will appear with a question **"Are you sure you want to remove this image?"** Click on either the **"OK"** button to accept or the **"Cancel"** button to cancel the action.
   e. Click on the **"Add property photo"** button to upload it to the transaction record.





4. Once you click on the **"Add property photo"** button, you will receive the Form Simplicity confirmation message ***Your property photo has been saved***.

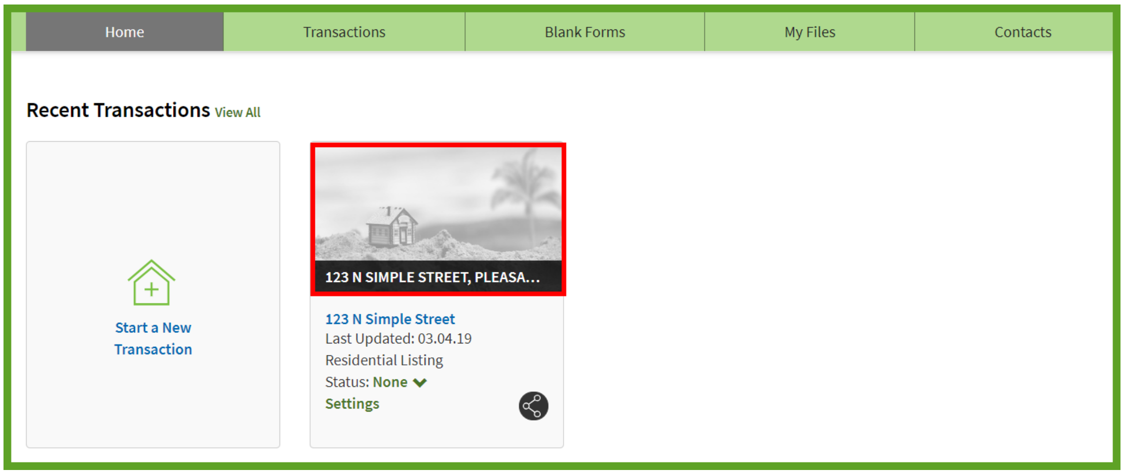
5. The property photo appears in the transaction record.



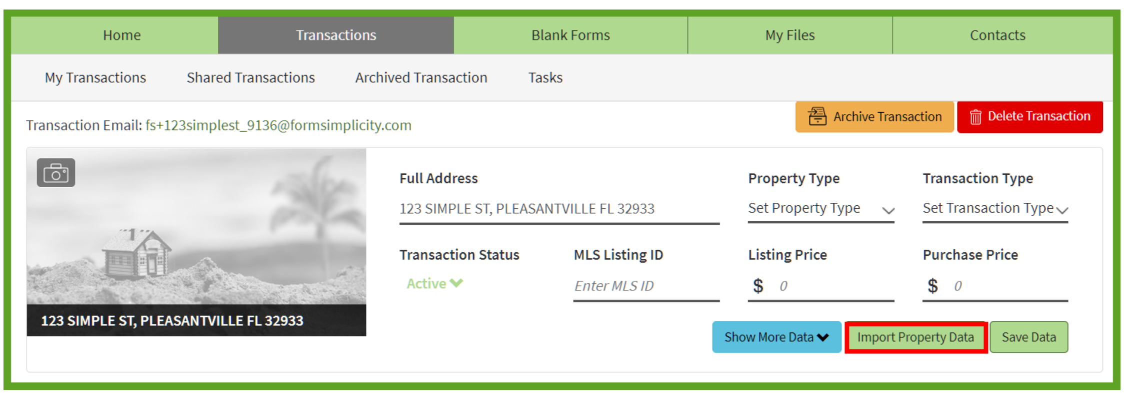
Transactions: Import Property Data – MLS Information

By using the **Import Property Data** feature, existing property data can be imported into a transaction from the MLS. Doing so saves you time by filling in fields with data that is already captured in the MLS listing, decreasing the time it takes to add a transaction manually.

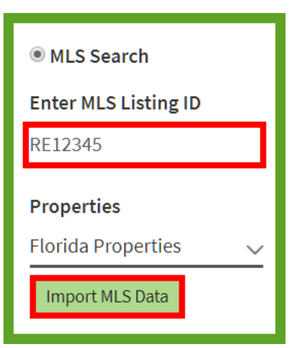
1. Log in and either from the home screen or from **"My Transactions"** from the **"Transactions"** main navigation menu, click on the transaction you wish to import MLS data.



2. At the transaction screen, click on the **"Import Property Data"** button.



3. Enter the **"MLS Listing ID"** into the field and click the **"Import MLS Data"** button.



4. Your search results will list. Click on **"Select"** to import the MLS data into your active transaction.

MLS Search results for RE12345

Action	Listing ID	Address	City	Price	Beds	Bath
Select	RE12345	123 N Simple Street	Pleasantville	350000	4	3

5. The preview of the MLS Listing information will appear. Scroll to the bottom of the transaction section and click the **"Save information to transaction"** button.

MLS Listing ID RE12345

Property Information

Address: 123 N Simple Street Pleasantville FL 32757
County Parcel: 111-123-321654 **County Name:** Lake
Year Built: 2009 **Beds:** 4 **Baths:** 3 **Association Fees:** $125.00
Legal Description: TRANQUIL TERRACE N 132 FT OF LOT 8 BLK 1 PB 11 PG 42

Listing Information

Listing Price: $350,000.00 **Listing Start Date:** 2010-04-01

Seller/Landlord Information

Seller/Landlord Name: Sam and Sally, a married couple
Full Address:
Brokerage Name:
Brokerage Address:
Brokerage Phone: **Brokerage Fax:**
Broker Name: **Broker Email:**
Agent Name: **Agent ID:** **Agent Email:**

Buyer/Tenant Information

Buyer/Tenant Name: &
Full Address:
Brokerage Name: Training Office
Brokerage Address: 7025 Augusta National Dr., Orlando, FL 32822
Brokerage Phone: (407) 438-1400 **Brokerage Fax:** (407) 438-1411
Broker Name: Trainer Kaz Cisowski **Broker Email:**
Agent Name: Student User 2 **Agent ID:** 23761 **Agent Email:** kaz@yourparadisehome.com

☑ Include main listing photo
**This will replace your current photo*

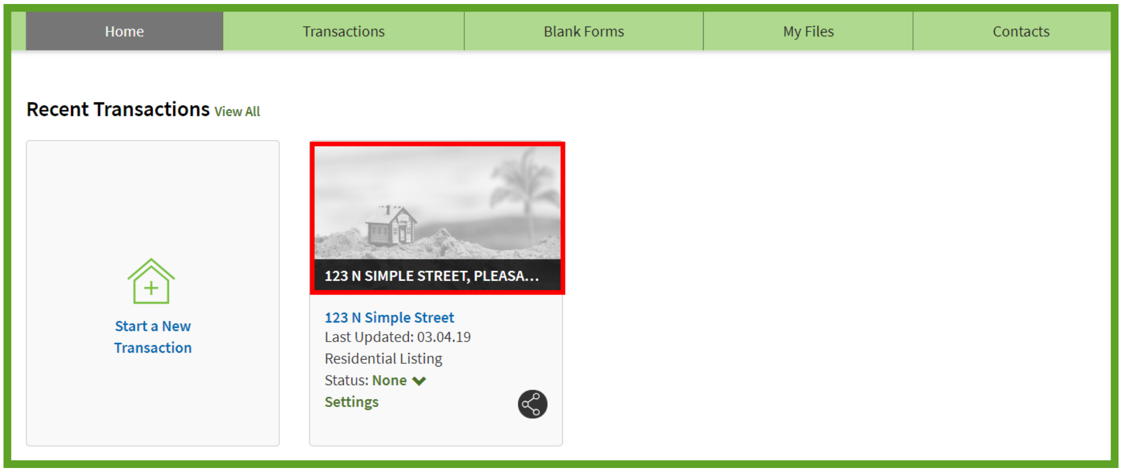
Save information to transaction

6. This will save the listing data and the listing photo you imported from the MLS to your transaction and will auto-populate all the forms in your transaction as applicable.

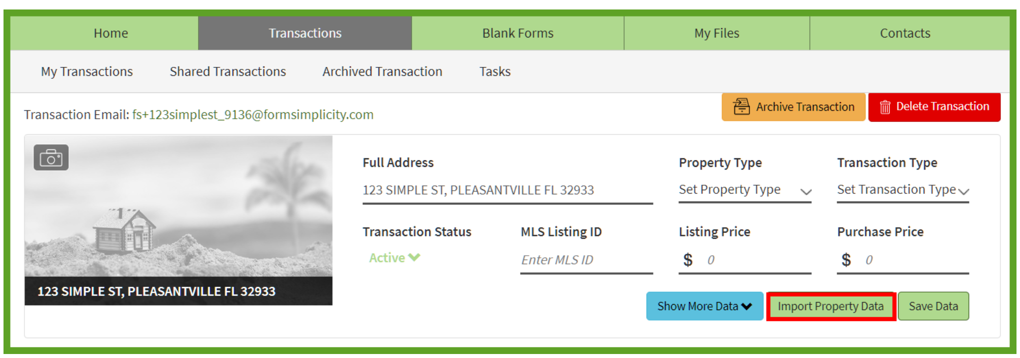
Transactions: Import Property Data – Tax Information

Existing property data can be imported into a transaction from the property tax data record. Doing so saves you time by filling in fields with data that is already captured in the tax record.

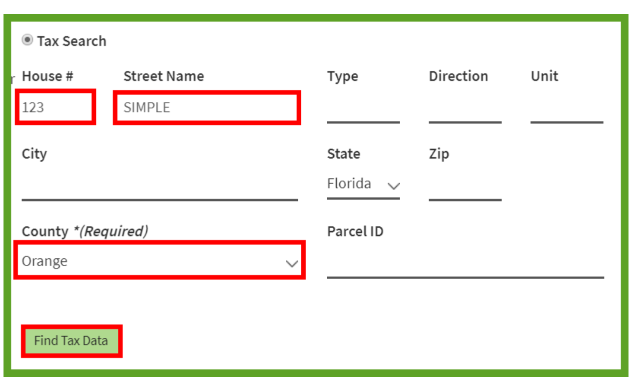
1. Log in and either from the home screen or click on **"My Transactions"** from the **"Transactions"** main navigation menu, click on the transaction you wish to import MLS data.



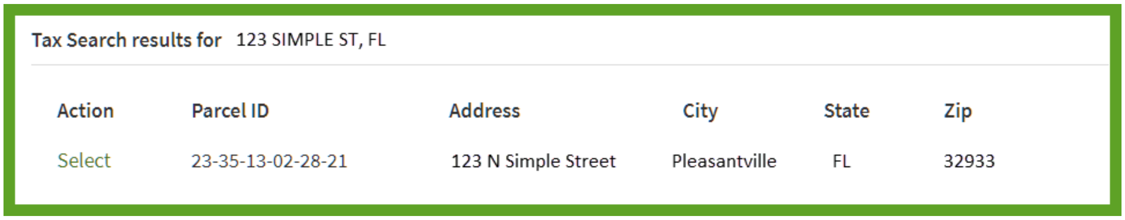
2. At the transaction screen, click on the **"Import Property Data"** button.



3. Add your criteria in the tax fields, and then click the **"Find Tax Data"** button.
   Hint: Enter only the House# and Street Name information for best results.
   *Hint: Remember to select the **county** where the property is located.*



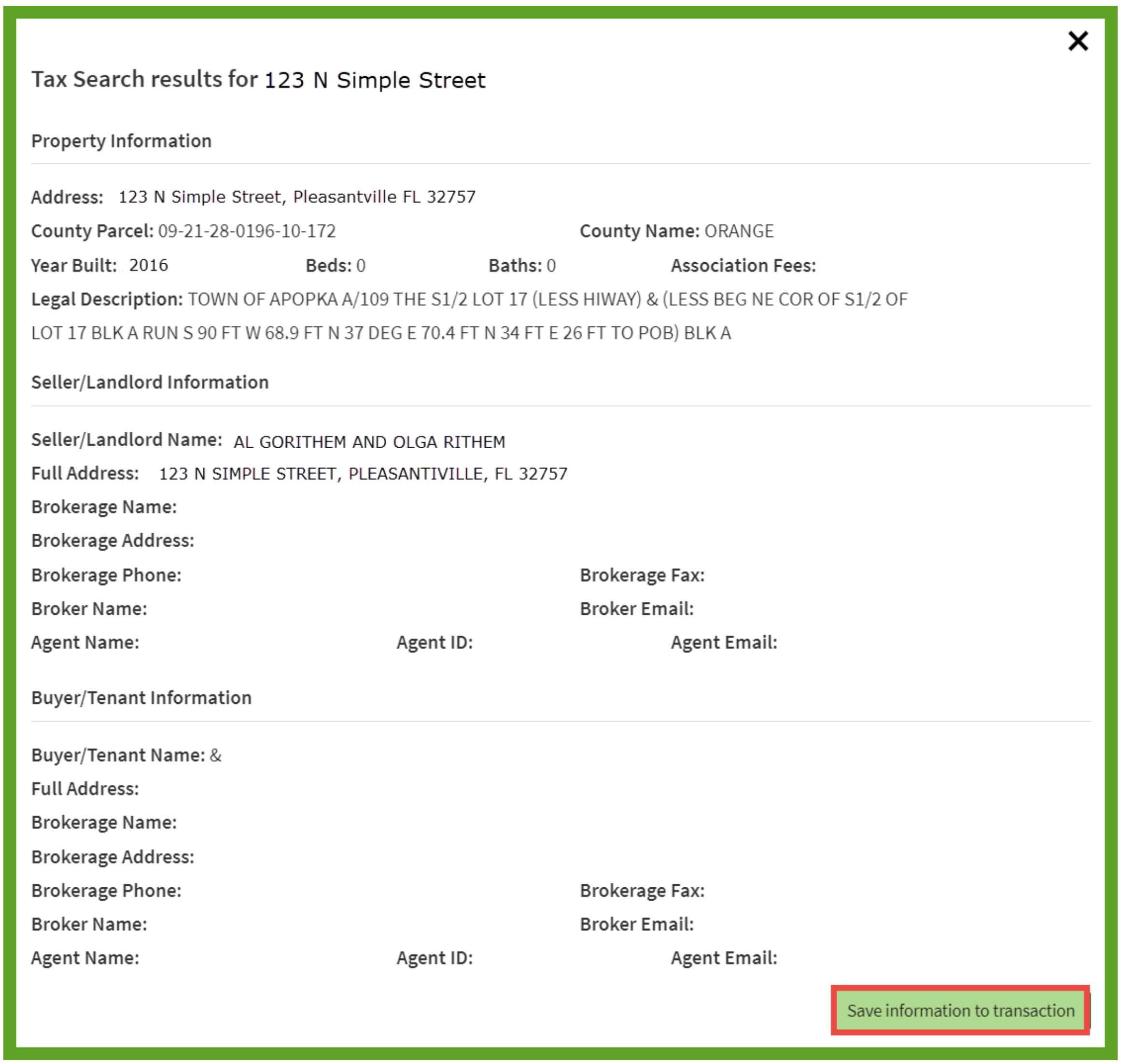
4. If the property has tax data available, it will return a result. Click on **"Select"** to import the data to your transaction.



Tax Search results for 123 SIMPLE ST, FL

Action	Parcel ID	Address	City	State	Zip
Select	23-35-13-02-28-21	123 N Simple Street	Pleasantville	FL	32933

5. The preview of the Tax Record property information will appear. Scroll to the bottom of the transaction section and click the **"Save information to transaction"** button.



Tax Search results for 123 N Simple Street

Property Information

Address: 123 N Simple Street, Pleasantville FL 32757

County Parcel: 09-21-28-0196-10-172 County Name: ORANGE

Year Built: 2016 Beds: 0 Baths: 0 Association Fees:

Legal Description: TOWN OF APOPKA A/109 THE S1/2 LOT 17 (LESS HIWAY) & (LESS BEG NE COR OF S1/2 OF LOT 17 BLK A RUN S 90 FT W 68.9 FT N 37 DEG E 70.4 FT N 34 FT E 26 FT TO POB) BLK A

Seller/Landlord Information

Seller/Landlord Name: AL GORITHEM AND OLGA RITHEM

Full Address: 123 N SIMPLE STREET, PLEASANTIVILLE, FL 32757

Brokerage Name:

Brokerage Address:

Brokerage Phone: Brokerage Fax:

Broker Name: Broker Email:

Agent Name: Agent ID: Agent Email:

Buyer/Tenant Information

Buyer/Tenant Name: &

Full Address:

Brokerage Name:

Brokerage Address:

Brokerage Phone: Brokerage Fax:

Broker Name: Broker Email:

Agent Name: Agent ID: Agent Email:

Save information to transaction

6. This will save the data you imported from the tax records to your transaction and will auto-populate all the forms in your transaction as applicable.

Transactions: Transaction Participants

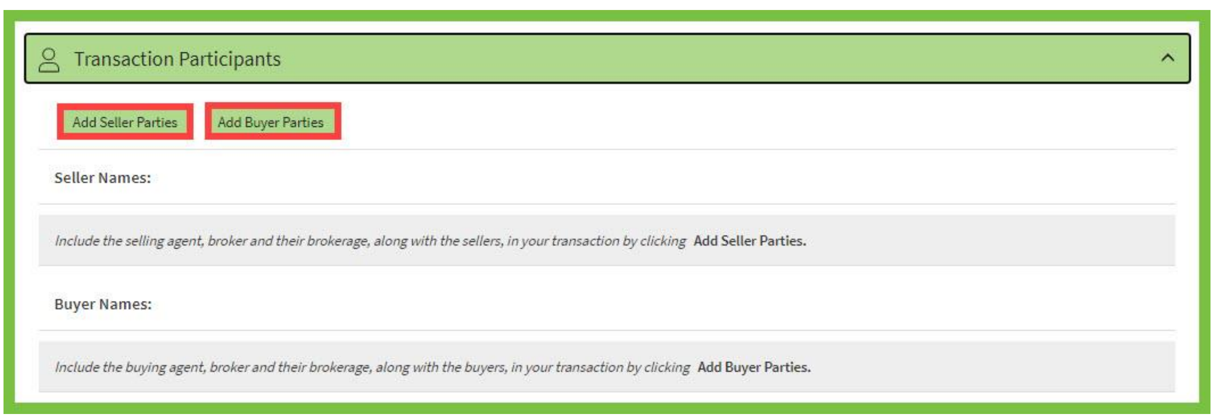
In this section, if you are working with the Seller in the transaction, include the Seller(s) along with Seller's Agent, the Seller's Broker and their Brokerage in your transaction by clicking on the **"Add Seller Parties"** button. If you are working with the buyer in the transaction, include the Buyer(s), the Buyer's Agent, Buyer's Broker, and their Brokerage in the transaction by clicking on the **"Add Buyer Parties"** button.

1. Add a New Form Simplicity Contact by either clicking on the **"Add a Contact"** icon in the ***Useful Tools*** section or by clicking on **"Contacts"** on the main navigation menu which will automatically go to the ***People*** section, then click on the **New Contact** button.

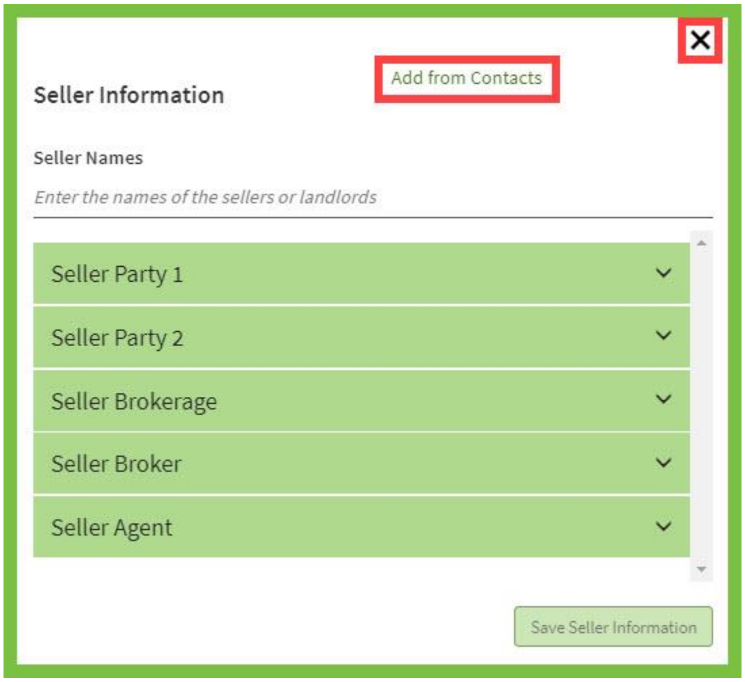
2. Click on the transaction to open it.

3. Scroll down and click on ***Transaction Participants*** section in your transaction.

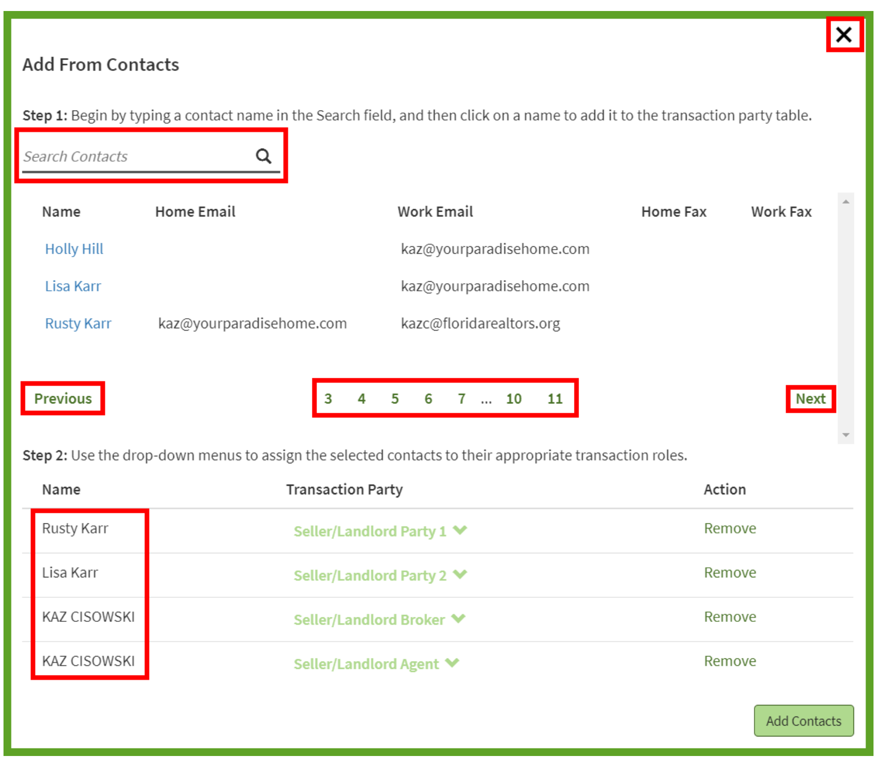
4. Once the ***Transaction Participants*** section is expanded, click on "**Add Seller Parties**" or "**Add Buyer Parties.**"



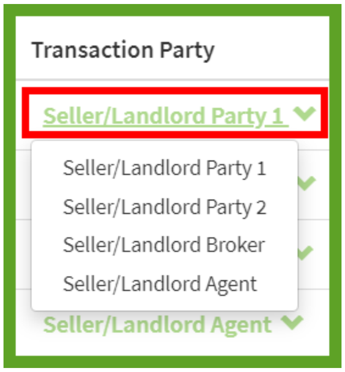
5. A pop-up window will appear. Click on “**Add from Contacts.”**



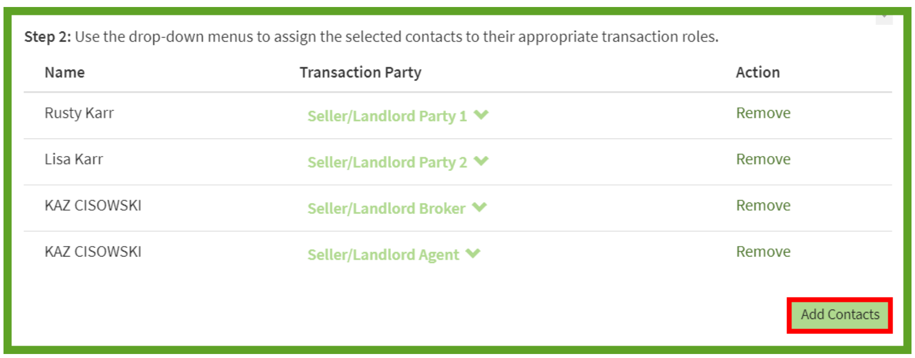
6. In the ***Add From Contacts*** window under Step 1, search for the contact(s) you would like to add. You can type in the name of the contact in the search area, select the page number on the bottom, or click on “Next”. *(Note: It will only display three contacts at a time).* Select the name of the contact you would like to add to the transaction. Once you’ve clicked on the name, it will appear in Step 2.



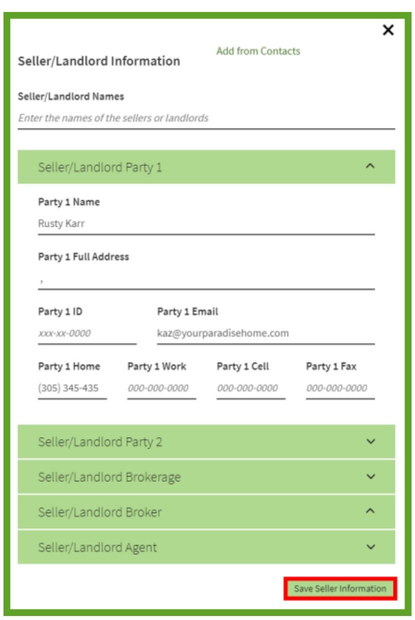
7. Select the **Transaction Party**. A Drop-down will appear which allows you to specify what type of contact it is in your transaction.



8. After selecting your contact(s) and assigning the correct party next to their names, click on the "**Add Contacts**" button on the bottom right.

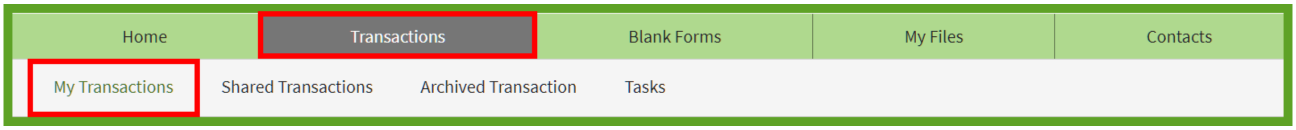


9. You will then see a popup with your contacts information. You can add additional information here if needed. Once finished, click on the "**Save Seller (or Buyer) Information**" button on the bottom right.

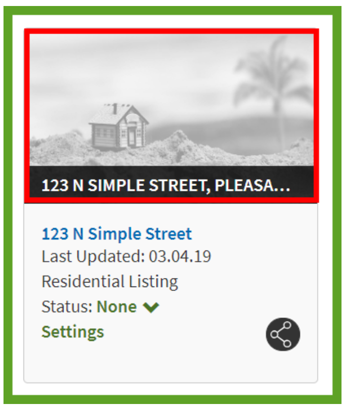


Transactions: Broker Review

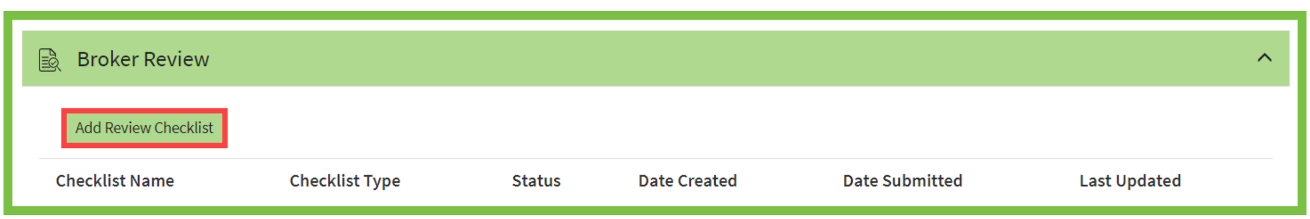
1. Log in and click on **"Transactions**" on the main navigation menu at the top of the Form Simplicity home page. This will automatically open the **"My Transactions"** screen.



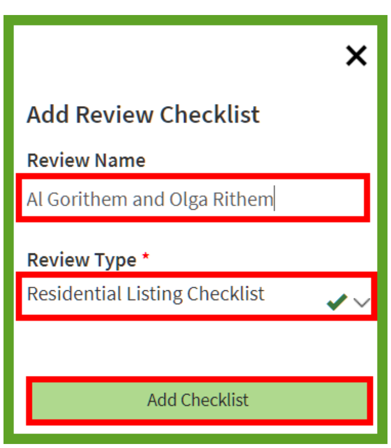
2. Click on the transaction folder to open.



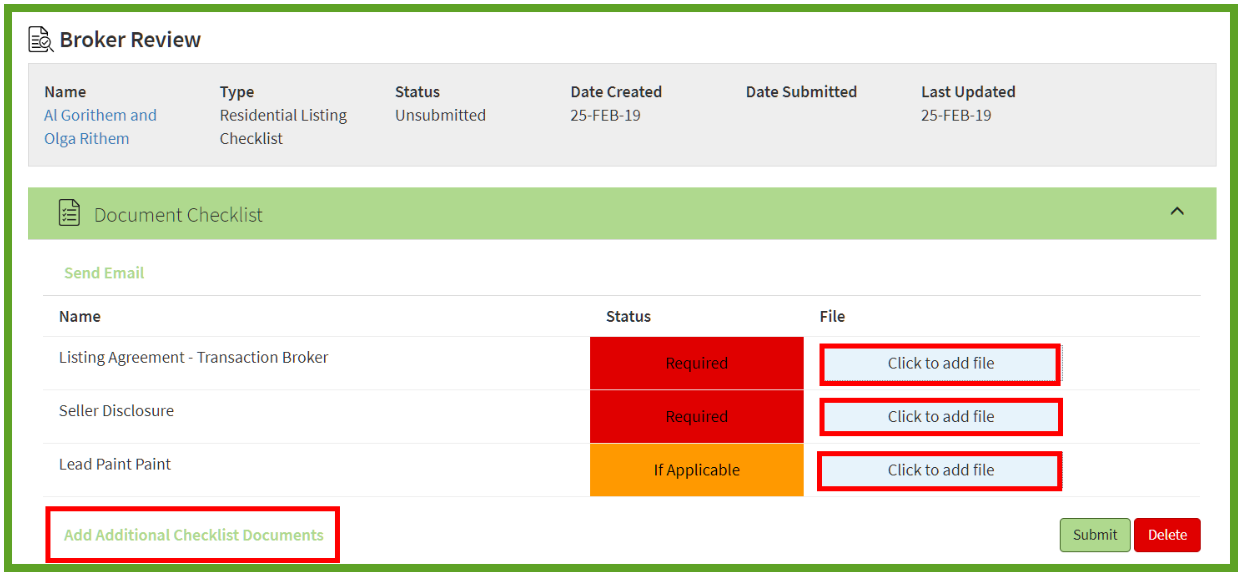
3. Then, click on the **"Add Review Checklist"** button in the ***Broker Review*** section. *Note: If there is no Broker Review section, then the broker has not created a transaction checklist.*



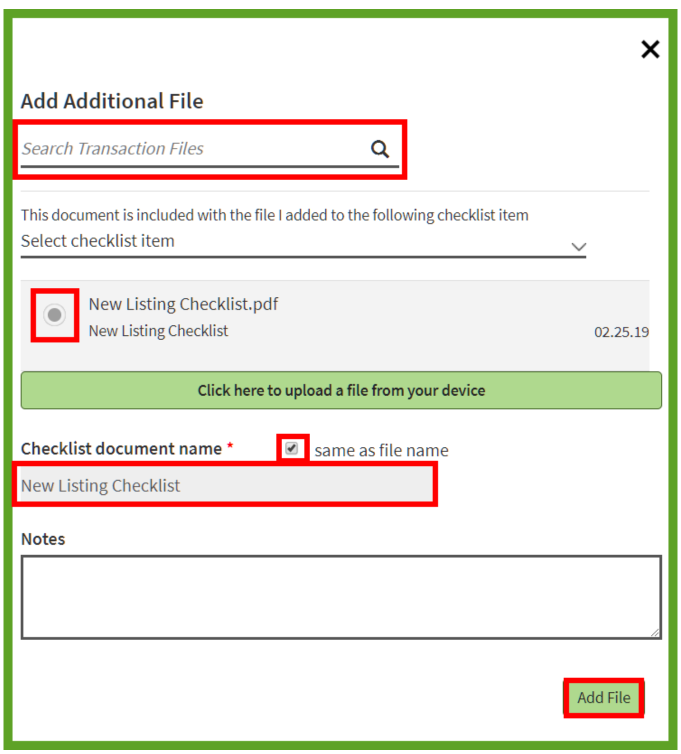
4. In the ***Add Review Checklist*** window, assign a **"Review Name"** for this review, select a **"Review Type"** from the drop-down menu and click on the **"Add Checklist"** button.



5. Click on the **"Click to add file"** button to the right of each ***Required*** or ***If Applicable*** item listed in the Document Checklist section. Select the appropriate checklist item below. You may only select one file per checklist item.



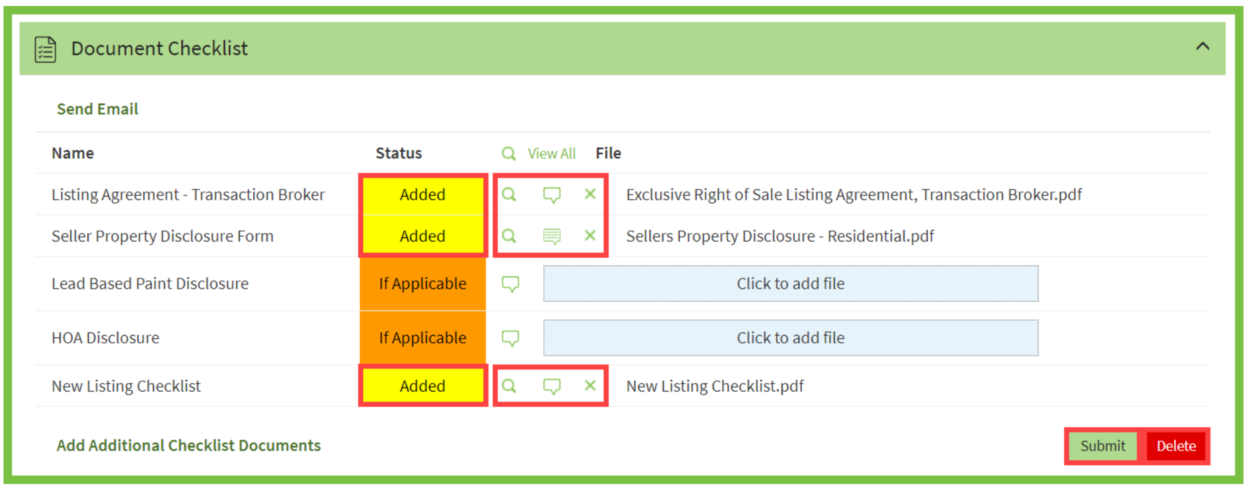
6. The **"Add Additional Checklist Documents"** above the list of checklist items allows multiple files to be uploaded. This is for any additional transaction files that are not listed in the checklist. Enter the **"Checklist item name"** in the space below. If you want to have the Checklist item name to be the same as the file name, click on the check box to the left of **"same as file name."** You can leave a note regarding this checklist item for your broker. After selecting the file(s), click the **"Add File"** button.



7. After the files have been attached to the items in the ***Document Checklist*** section, those items will show an **"Added"** status.

   a. Each item will contain a list of options:
      i. The **"magnifying glass"** opens the ***File Preview*** window allowing you to review a file.
      ii. The **"comment bubble"** opens the **Checklist Item Notes** window allowing you to write a note to your broker.
      iii. The **"x"** opens the ***Delete File*** window allowing you to remove a file from the ***Document Checklist***. *You can only remove a file if the status is ADDED or INCOMPLETE.*

   When you are satisfied that your checklist is complete, simply click on the **"Submit"** button. *Once you submit a checklist, you can no longer remove the files or delete the checklist. You can, however, add any additional files to the checklist.*



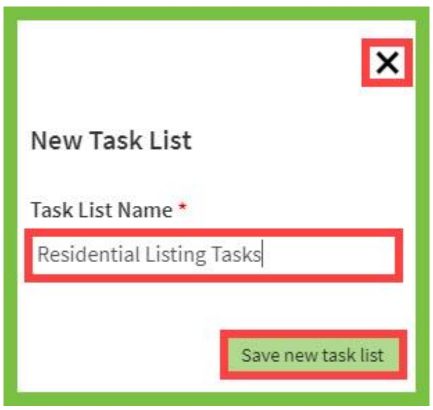
Notes: ______________________________

Tasks: Create New Task List

If you have tasks that must be completed on a regular basis for certain types of transactions, you should create those tasks as part of a task list template and include it in a template for that transaction type. However, if you occasionally need a task, a standalone task will suffice. Transaction tasks are now grouped and displayed within their assigned task lists that are now designated by headers.

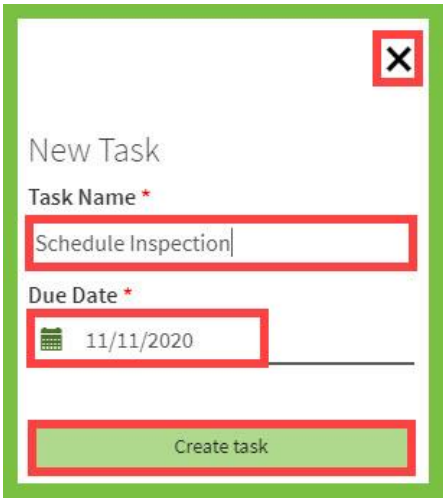
1. Open your transaction and click on the ***Tasks*** section. Then click on the **"Create New Task List"** button.

2. In the ***New Task List*** screen, enter the **"Task List Name"** and click on the **"Save new task list"** button. If you wish to cancel the action, click on the **"X"**. You will get the Form Simplicity confirmation message ***(The New Task List Name) task list is added to the Tasks section.***



3. The assigned task list header appears. Click on the **Add New Task** link to manually a new task.

4. In the ***New Task*** window, enter the name of the task and either enter date on the mm/dd/yyyy format or click on the calendar to select the date.



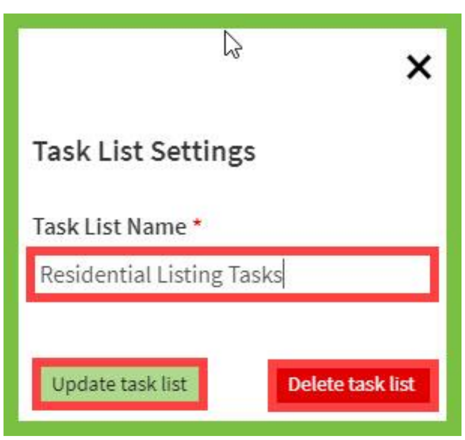
5. On the day, the task is due, you will receive an email reminding you of the task if you set up the task notification in the ***Email Notifications*** section of ***My Preferences***.

Tasks: Task List Headers

1. The ***Number*** to the right of the Task List Header is the number of how many tasks have been created.

2. The ***Up and Down Arrow Icons*** located on the right side of the Task List Header adjusts the order that each task list appears.

3. The ***Task List Settings Icon (shown by the Gear)*** is used to rename or delete the task list. Click on the **"Update task list"** button after renaming the Task List Name. To delete the task list, click on the **"Delete task list"** button.

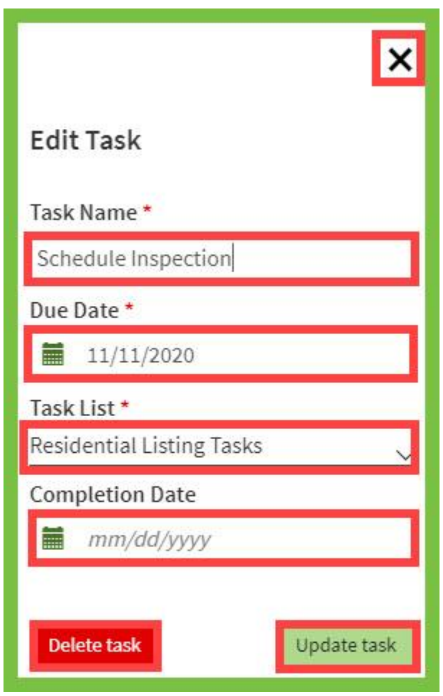


Tasks: Update Task

Tasks can be changed which includes changing the due date on the task or changing the name of the task.

1. Open your active transaction and click on the ***Tasks*** section. Locate the task you wish to edit and click on its link.

2. In the ***Edit Task*** window, edit the **Task Name, Due Date** or **Task List** or if you completed the task, enter the **Completion Date** and click the "**Update Task**" button. Click on the **"X"** to cancel the action.

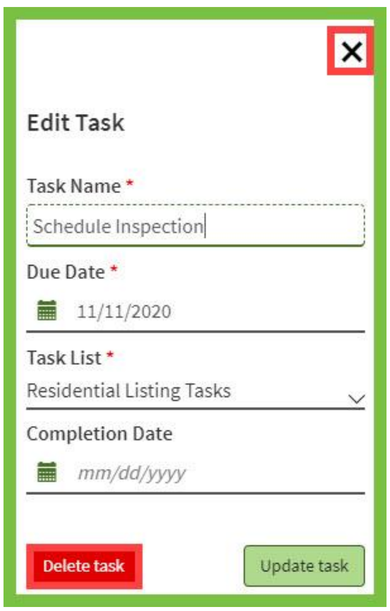


Tasks: Delete Task

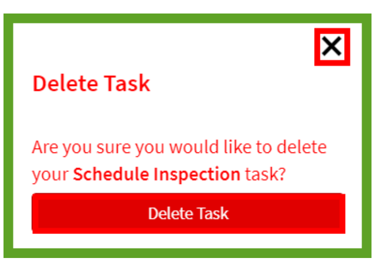
You may discover that you no longer need to complete a task that is part of a transaction.

1. Open your transaction and click on the ***Tasks*** section. Locate the task you wish to edit and click on its link.

2. At the ***Edit Task*** screen, click on the **"Delete task**" button or click on the **"X"** to cancel the action.

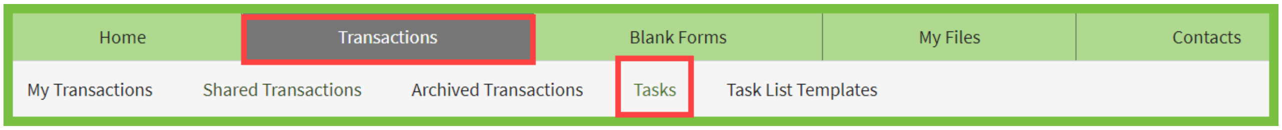


3. A ***Delete Task*** box will pop up requesting confirmation. Click the **"Delete Task"** button to delete or click on **"X"** to cancel the action.

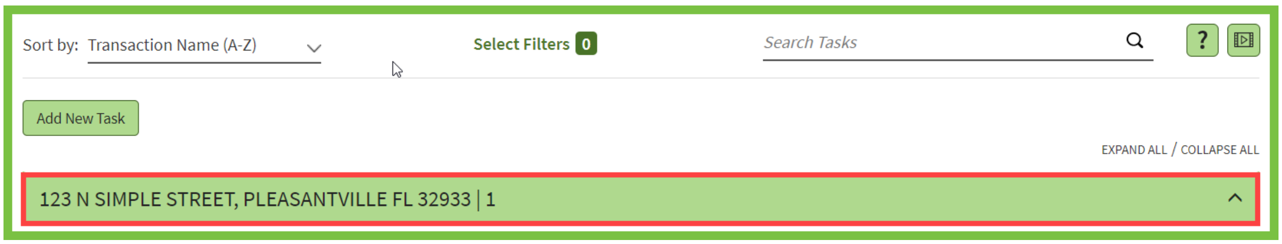


Tasks: Accessing Transaction Tasks

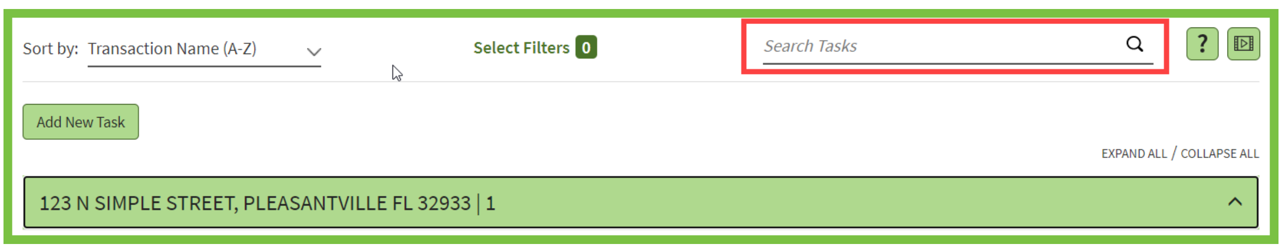
1. Log in and click on **"Transactions**" on the main navigation menu at the top of the Form Simplicity home page. Then select **"Tasks"** from the secondary navigation menu.



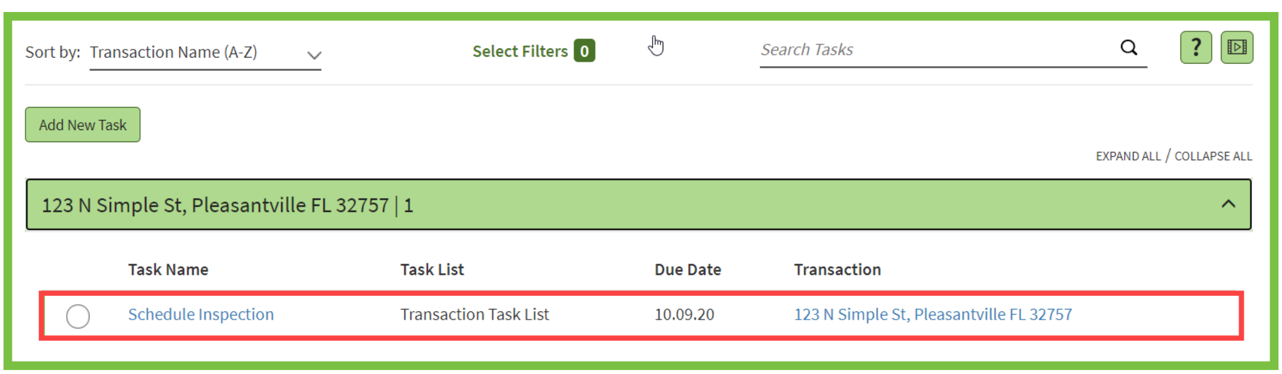
2. All the tasks for all your transactions will be listed.



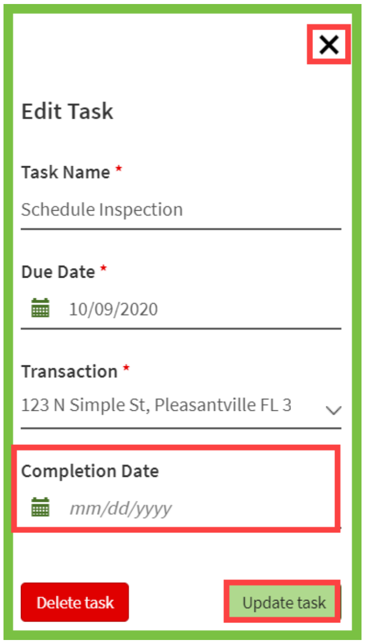
3. You may use the ***Search Tasks*** search bar clicking on the magnifying glass to locate the task you need.



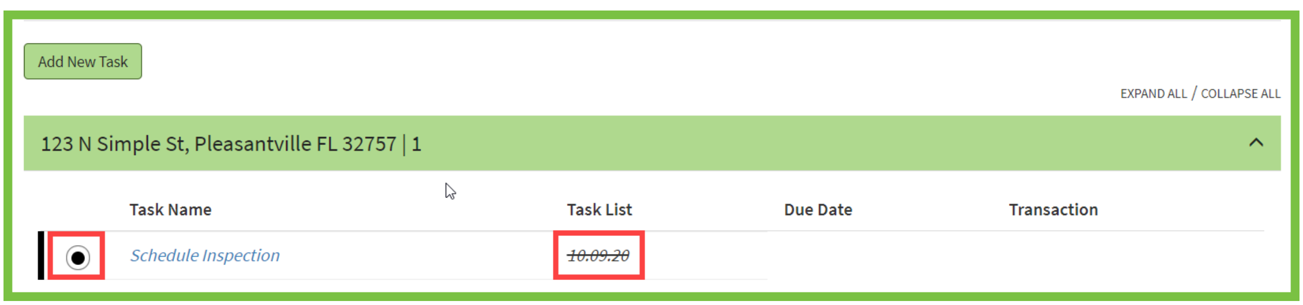
4. You may edit or delete the tasks, by clicking on the "**Task Name"** link.



5. For completed tasks, under the ***Edit Task*** screen, click on the task ***Completion Date*** field and **select the date** from the calendar and click **"Update task".**



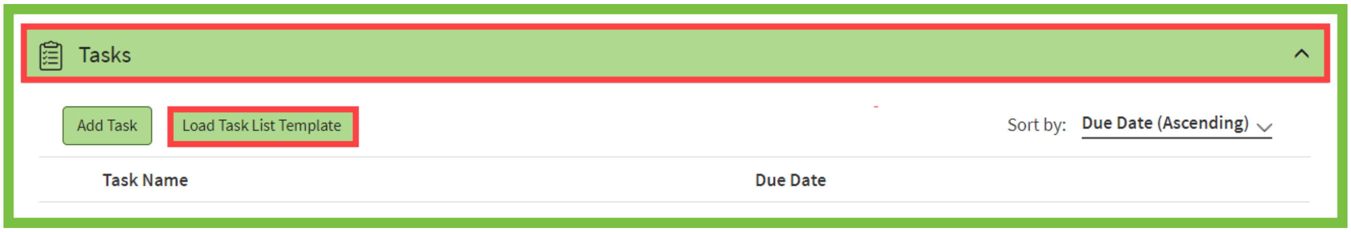
6. For completed tasks, you can also click on the radio button to the left of the task name. It produces a strike-through to the task list to show this task is completed.



Task List Templates: Add a Task List Template to Your Transaction from the Transactions Page

1. Open the transaction. Scroll down and click on the ***Tasks*** section.

2. Click on **Load Task List Template**.



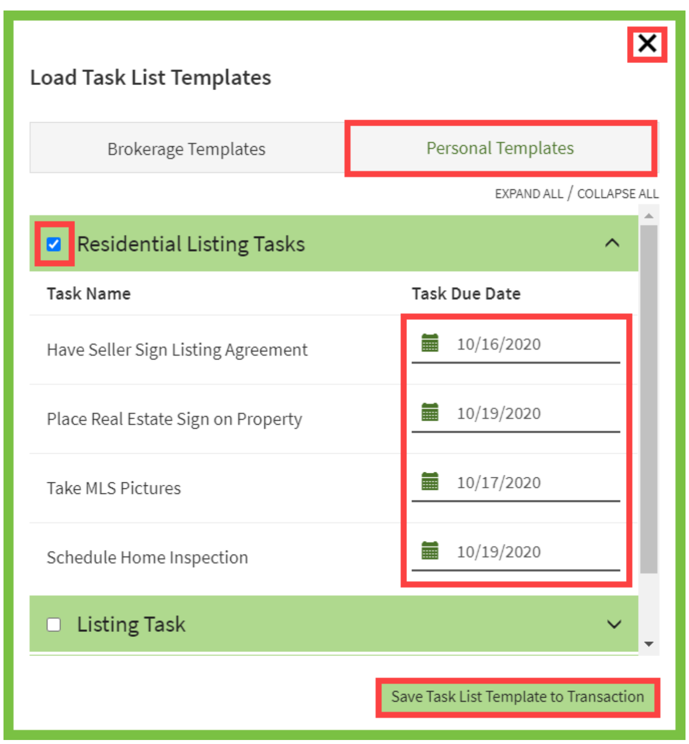
3. Select either **"Broker Templates"** or **"Personal Templates**."

4. Select the name of the template by placing a check mark in the box next to the ***Template Name***.

5. Under the ***Task Due Date*** column, add the due dates to the tasks you want to add to your transaction. If you don't add a date, it will default to TODAY's date.

   Note: you can only add all the Task, you don't have the option to select only some of the tasks.

6. Then click on the **"Save Task List Template to Transaction"** button.

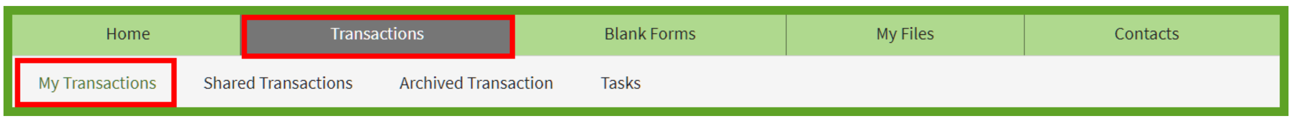


Transactions: Collaboration

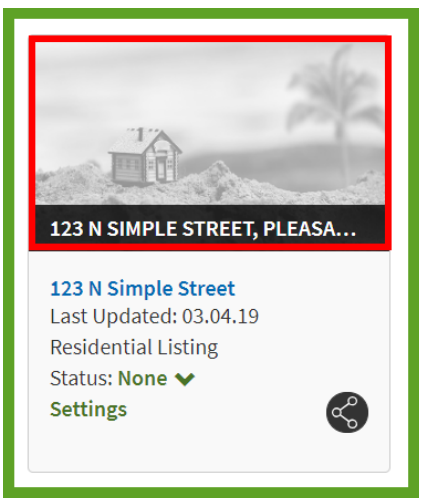
Collaboration is a paperless feature which allows outside parties and clients to add negotiation comments to forms and files that the agent has shared with them since those outside parties and clients are unable to edit any transaction details. It is the easiest way to track negotiation comments from all parties and keep all the information together in your transaction in real time.

Initiate the Collaboration

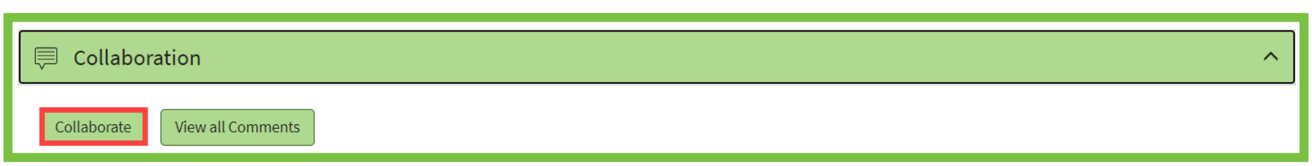
1. Log in and click on **"Transactions"** on the main navigation menu at the top of the page. Then select **"My Transactions"** from the secondary navigation menu.



2. Click on the transaction folder to open.

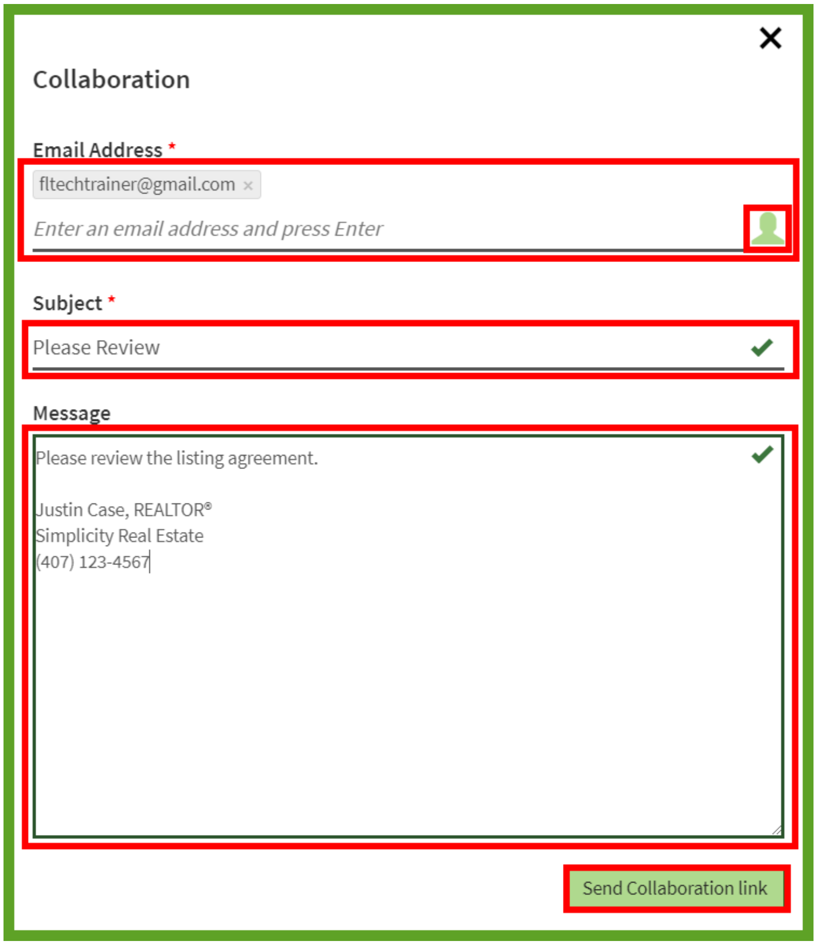


3. Go to the ***Collaboration*** section of the transaction and click on the **"Collaborate"** button.

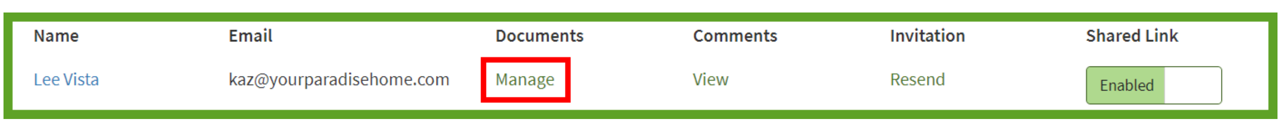


4. In the ***Collaboration*** window, enter the email address of the person with whom you wish to share the files and forms. Add a subject and a message, then click on **"Send Collaboration link"** button.

   Note: Repeat this step with each person who should be able to view the forms & files.

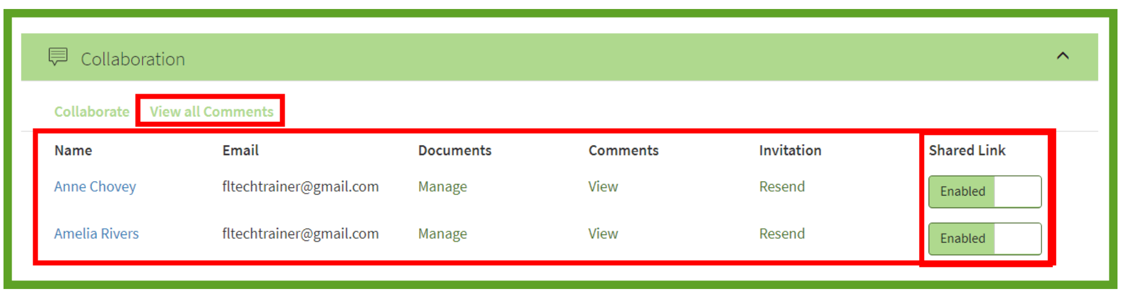


5. Once the link is sent, you can then click **"Manage"** to choose the forms and files from that transaction to allow the collaborator to view.



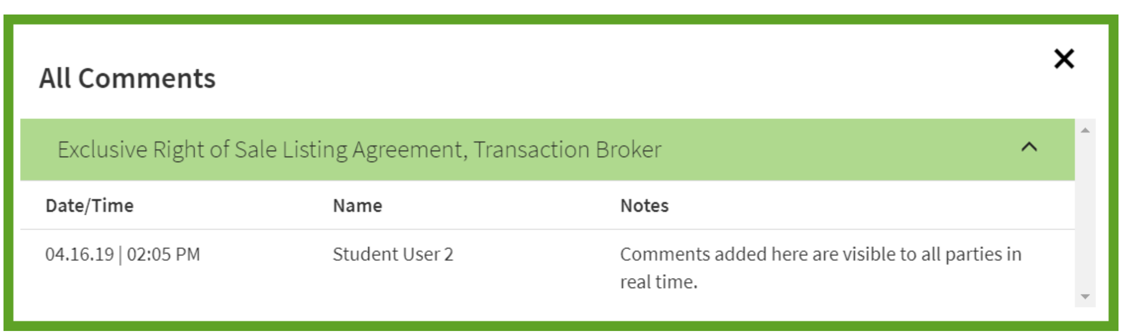
6. Use the checkboxes to select the forms and/or files for the collaborator to view, then click on the **"X"** to close the ***Collaboration Documents*** window. There is no save confirmation in this box. The selections update in real time.

7. As long as the **Shared Link** is **"Enabled"**, the recipients may continue to add comments.



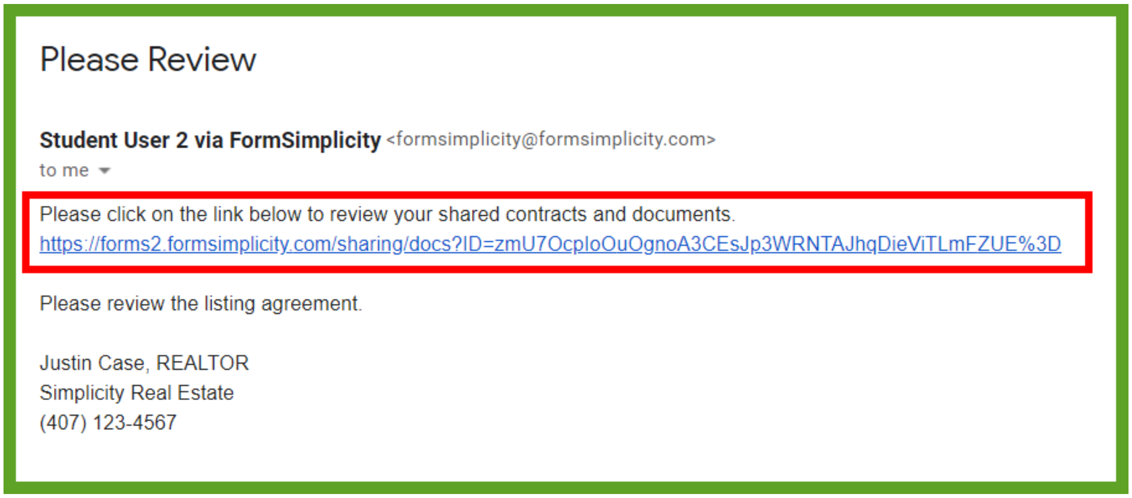
Note: You can make changes to the documents and your client can see those changes through the share link in real time. You do not need to send them another link. Just make sure they know you made the change. They may continue to access the updated forms and files with the original link that you sent them.

8. As the recipients continue to add comments, the agent can view the comments by clicking on **"View all Comments"** link or the **"View"** link under the ***Comments*** column.

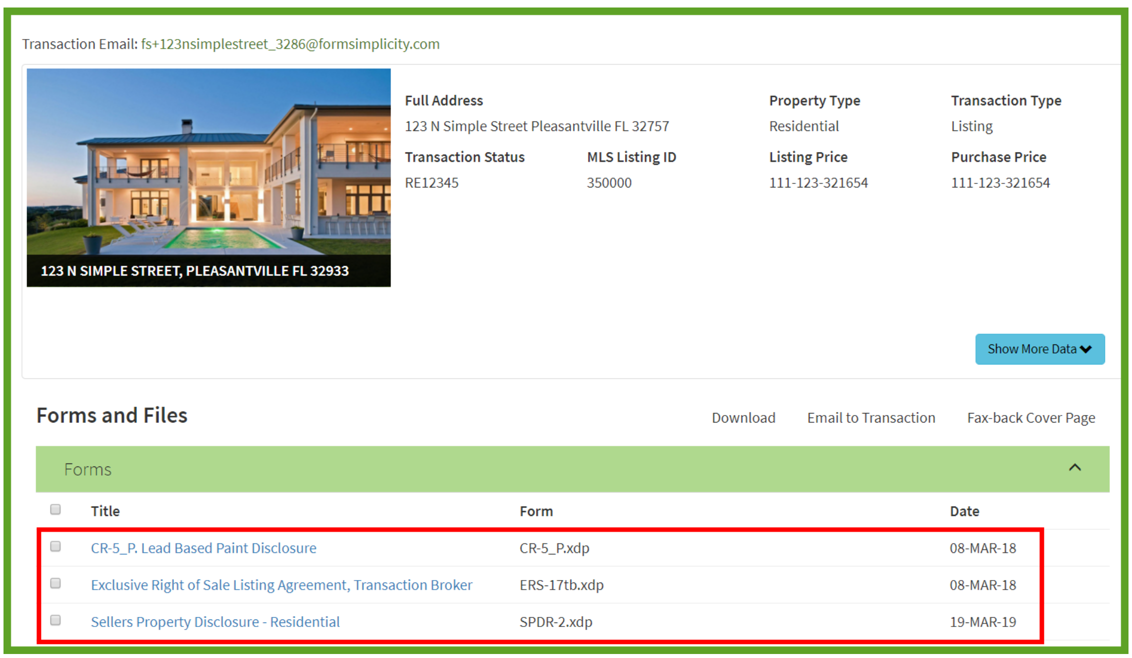


The Recipient's Perspective

1. After you have created and initiated the collaboration process, the recipient will receive an email with the **SHARE LINK** in it. Clicking on the link will allow them to view the documents you shared with him/her. This will begin the collaboration process.

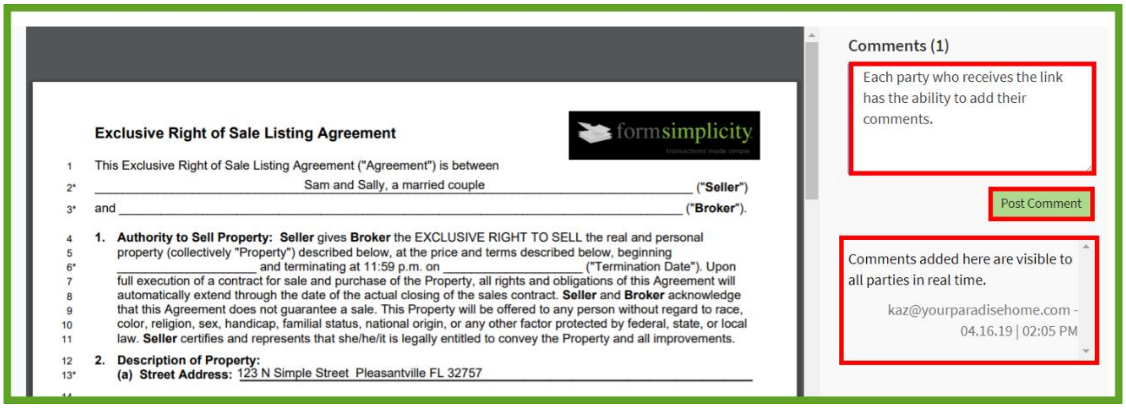


2. The recipient will be able to see the list of form(s) and/or file(s) included in the transaction for them to review.



3. Once the recipient opens the form(s) and/or file(s), they will see all the data on them. On the right side of the page, they add their comments.

   Note: They will not be able to make changes to the form itself. They can leave comments as long as the ***SHARE LINK*** *is active.*

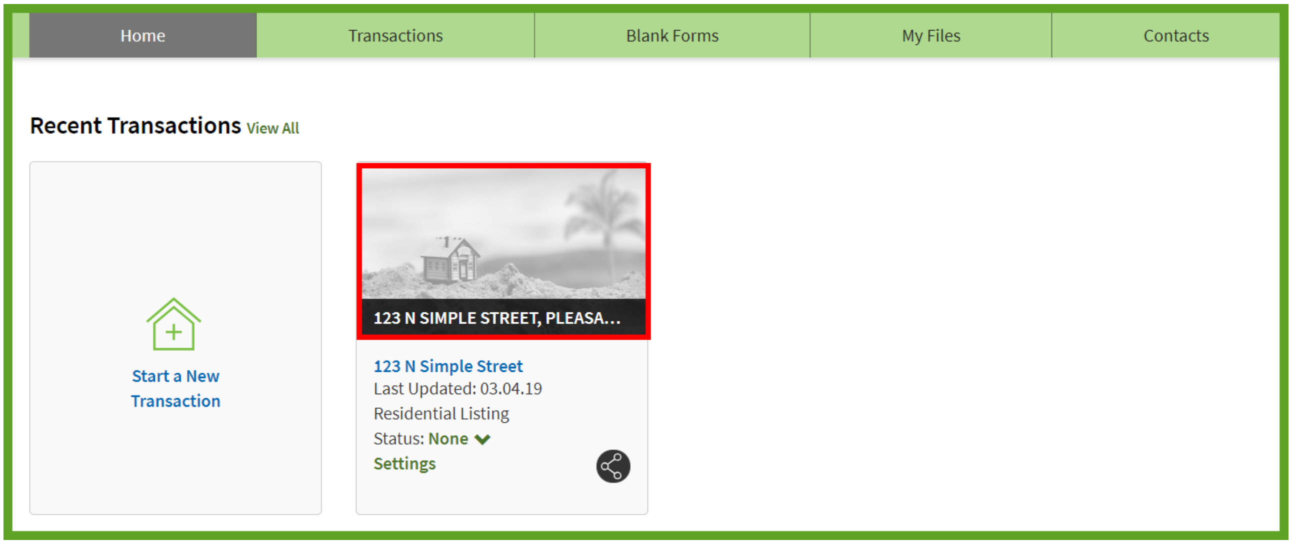


Notes:

Transactions: History

Tracking the History of your Transaction

1. Log in and from the home screen, click on the transaction folder you wish to see the history on.



2. Click the "**History**" title bar at the bottom of the transaction record. This will open and show you all the actions done within an active transaction.

Item	Action	Team Member	Date/Time
Exclusive Right of Sale Listing Agreement, Transaction Broker.pdf	**NEW FILE:** Exclusive Right of Sale Listing Agreement, Transaction Broker.pdf	Trainer Kaz Cisowski	02.25.19 / 09:17 PM
Modification to Listing Agreement	**DELETED:** Form deleted from transaction	Trainer Kaz Cisowski	02.25.19 / 07:30 PM
New Listing Checklist.pdf	**Deleted from '123 SIMPLE ST, PLEASANTVILLE FL 32933'**	Trainer Kaz Cisowski	02.25.19 / 09:17 PM
New Listing Checklist.pdf	**NEW FILE:** New Listing Checklist.pdf	Trainer Kaz Cisowski	02.25.19 / 09:11 PM
New Listing Checklist.pdf	**NEW FILE:** New Listing Checklist.pdf	Trainer Kaz Cisowski	02.25.19 / 07:28 PM
Sellers Property Disclosure - Residential.pdf	**NEW FILE:** Sellers Property Disclosure - Residential.pdf	Trainer Kaz Cisowski	02.25.19 / 09:17 PM
Transaction Record	**DELETED:** Form deleted from transaction	Trainer Kaz Cisowski	02.25.19 / 07:30 PM

Notes: ____

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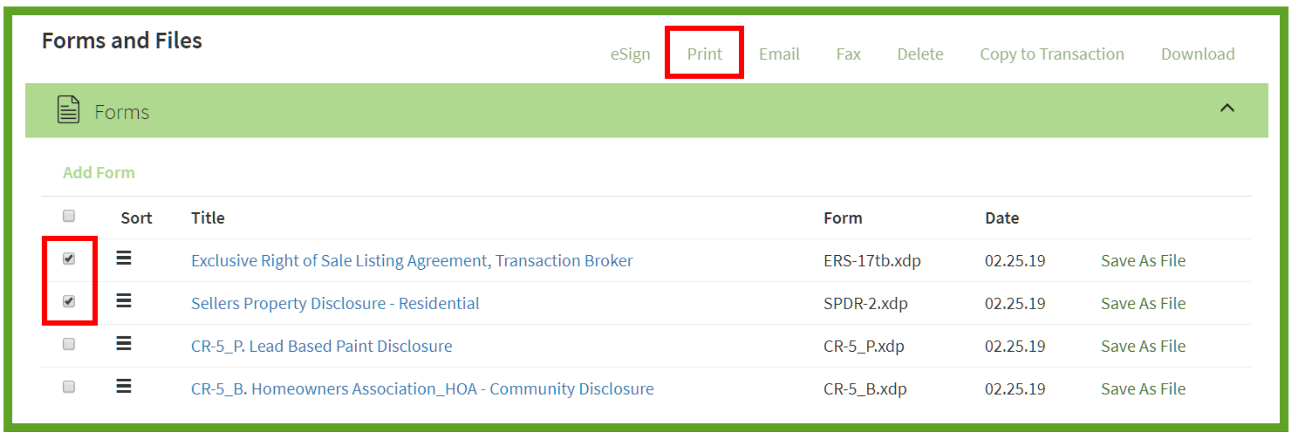
Transactions: Print Form(s) and/or File(s)

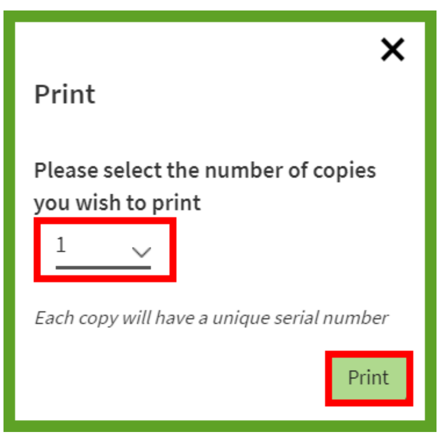
Print a form(s) and/or file(s) from a transaction when you need to work with a hard copy of the form(s) and/or file(s). For example: If you are working with a client who does not want to use eSign, you can print the required form(s) and/or file(s)for them to sign.

1. Log in and open the transaction.

2. Select the form(s) and file(s) that you would like to print by placing a check mark on the boxes next to them. Click on "**Print**" located to the right of the ***Forms and Files*** section.



3. Click "**PRINT**" to confirm the action, or **"X"** to cancel it.



Notes: ____

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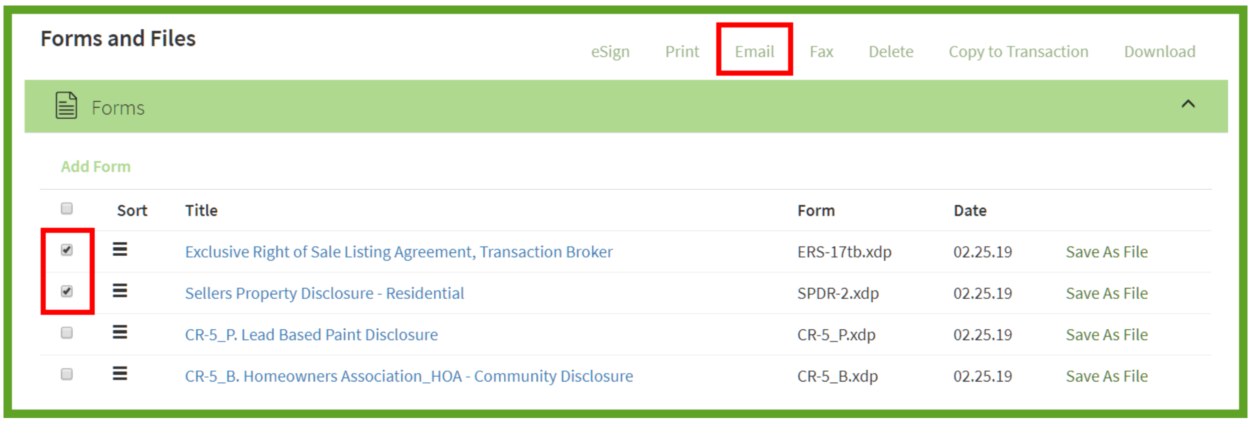
Transactions: Email Form(s) and/or File(s)

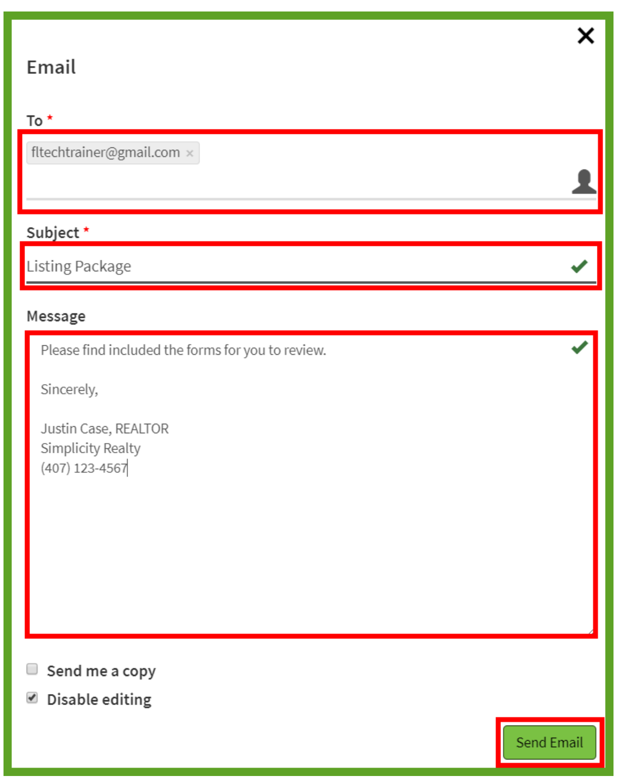
Email form(s) and/or file(s) from a transaction when you need to work with a hard copy of the form(s) and/or file(s). For example: If you are working with an out-of-town client who does not want to use eSign, you can email the required form(s) and/or file(s) for them to sign.

1. Log in and open the transaction.

2. Select the form(s) that you would like to print by placing a check mark on the boxes next to them. Click on **"Email"** located to the right of the ***Forms and Files*** section.



3. Enter the recipient's email address is the "**To**" box, type your "**Subject**" and "**Message**", then click "**EMAIL**" to confirm the action or **"X"** to cancel it.

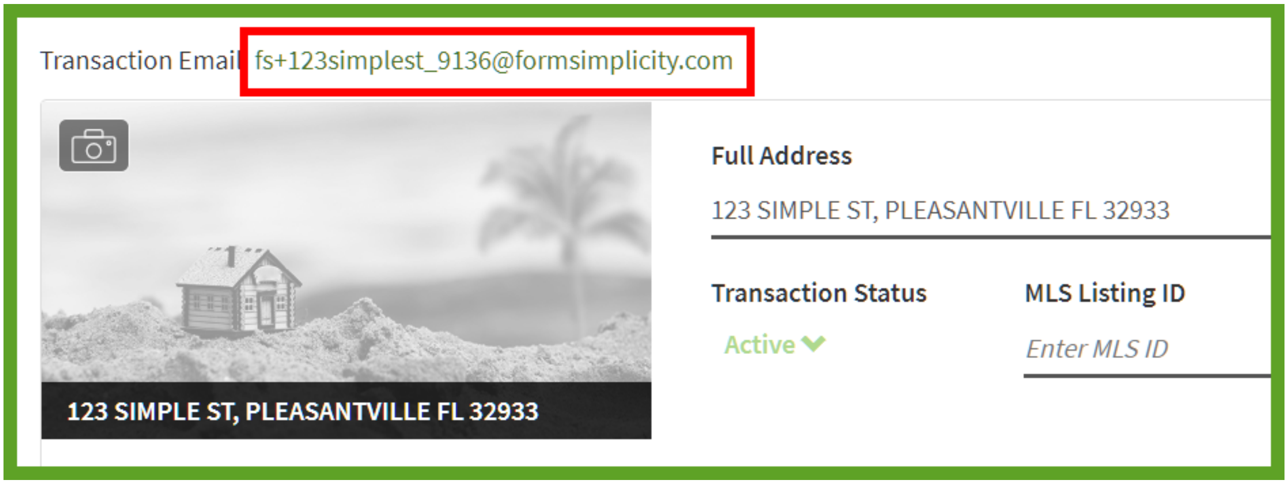


Email to Your Transaction

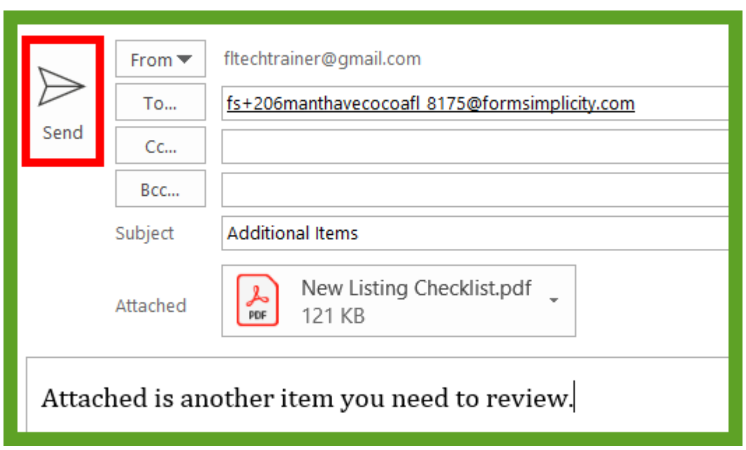
1. Open the transaction.

2. Above the transaction photo in the upper left-hand corner, you will see the Email address that is unique to the transaction. Click on the **Transaction Email address** to compose a new email message.

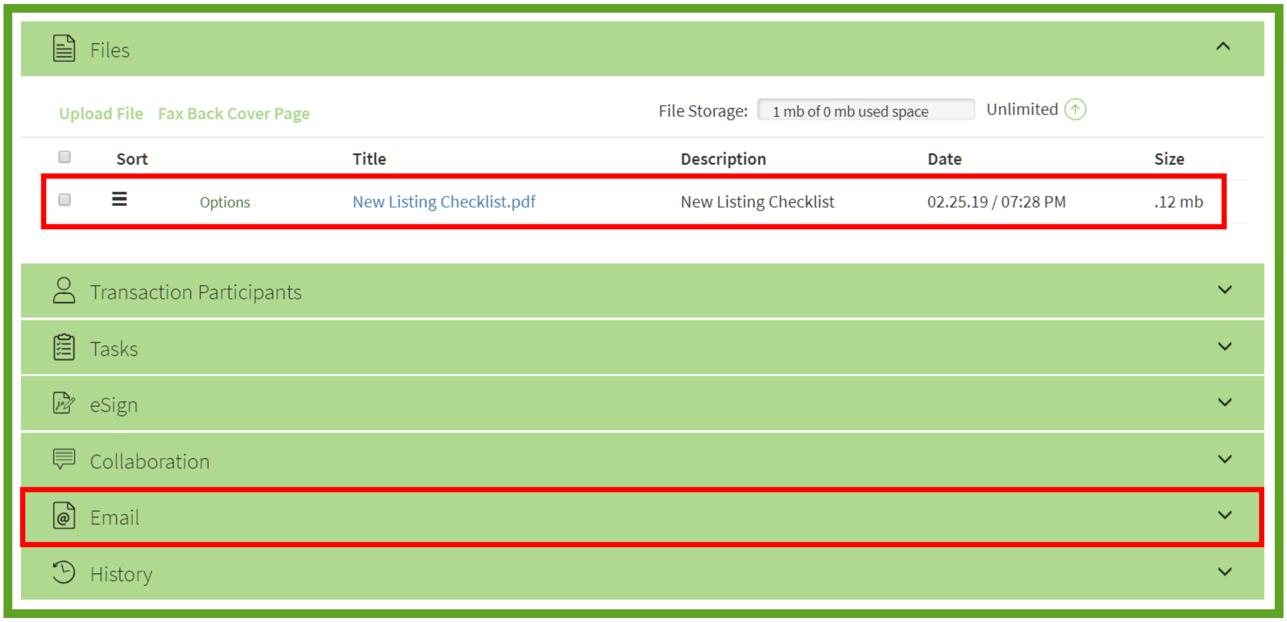
   Note: You may also give your clients this Email address for them to send emails directly to the transaction, or you may use it in the cc field if you are emailing your clients directly from your own Email application.



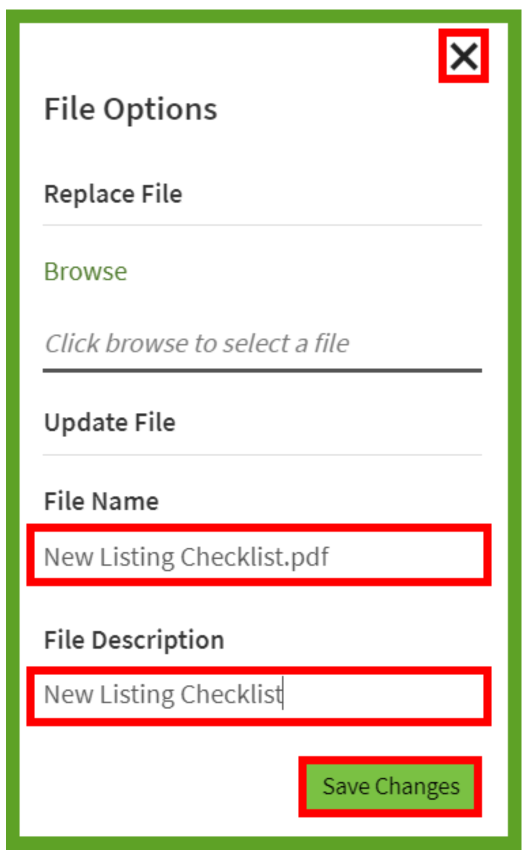
3. Attach the file (located in your computer) that you want to email to the transaction. ***Note: File must be 5MB or smaller.*** Continue composing your message and when ready, click "**Send**" to email the file to the transaction.



4. The file you Emailed to the transaction will appear under the ***Files*** section of the transaction. The completed Email will appear in the "**Email**" section of the transaction.



Note: You may change the name or description of the file by clicking on the **"OPTIONS"** *button. Click "**Save Changes**" to confirm or **"X"** to cancel the action.*

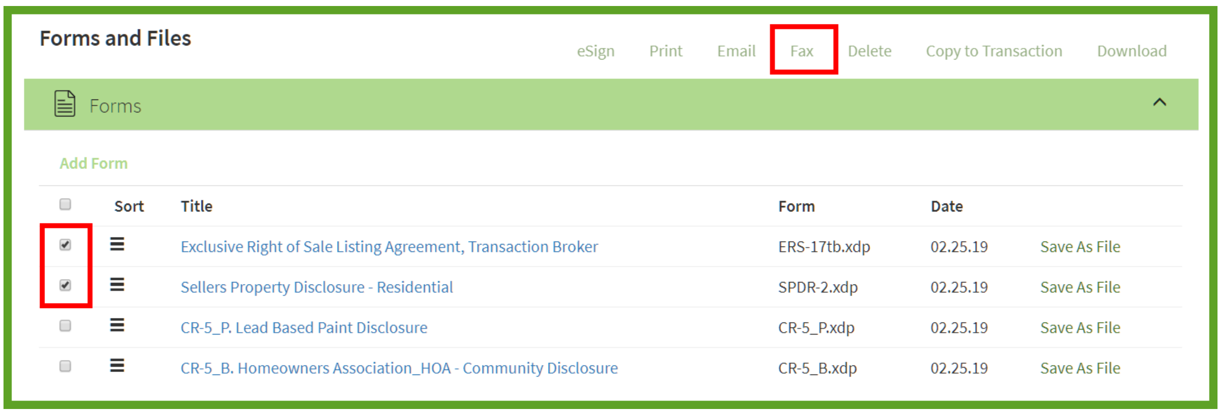


Transactions: Fax Form(s) and/or File(s)

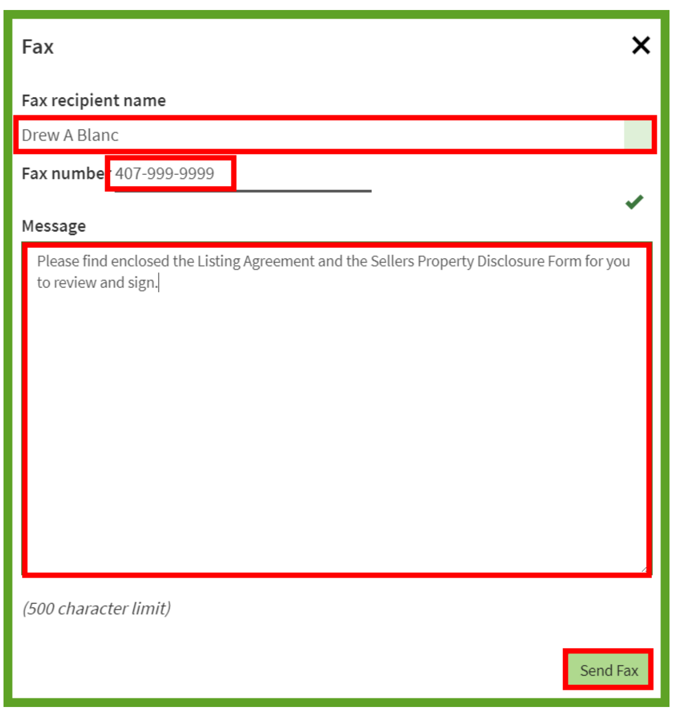
Use Form Simplicity to fax form(s) and/or file(s) from a transaction to a specific recipient. For example: If you are working with a client who only receives paperwork via fax, you can fax them the required form(s) and/or file(s) for them to sign and fax back.

1. Log in and open the transaction.

2. Select the form(s) that you would like to print by placing a check mark on the boxes next to them. Click on **"Fax"** located to the right of the ***Forms and Files*** header. This will allow you to fax directly to a fax machine.



3. Enter the Fax recipient name, Fax number, and enter a message and click **"Send Fax"** to send or **"X"** to cancel.



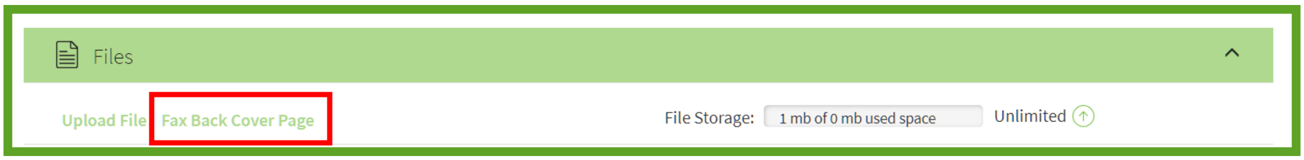
Faxing to a Transaction

Note: In order for you or your client to fax documents directly to the transaction, you (they) will need a transaction-specific Cover Page. This cover page contains a bar code, which is what Form Simplicity uses to recognize to which transaction the document files should be routed when the fax is received.

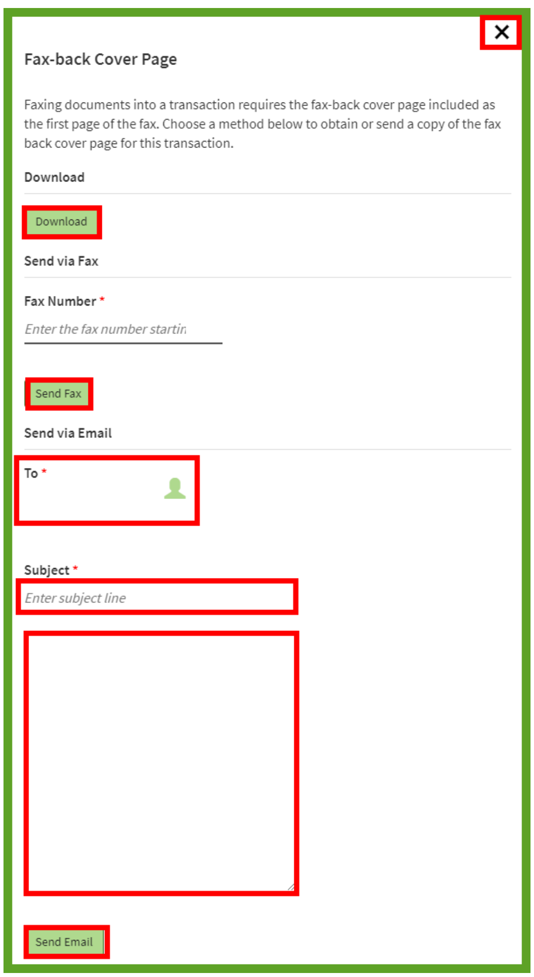
Follow these steps to obtain the ***Transaction-specific Cover Page****:*

1. Open the transaction.

2. Under the ***Files*** section of the transaction record, click on "**Fax Back Cover Page.**"



3. This will give you three options for obtaining the **Fax-back Cover Page: Download, Send Fax, Send Email**. Select your preferred method and fill out the necessary information.



4. The Cover Page should be the first page of the documents being faxed to the transaction.

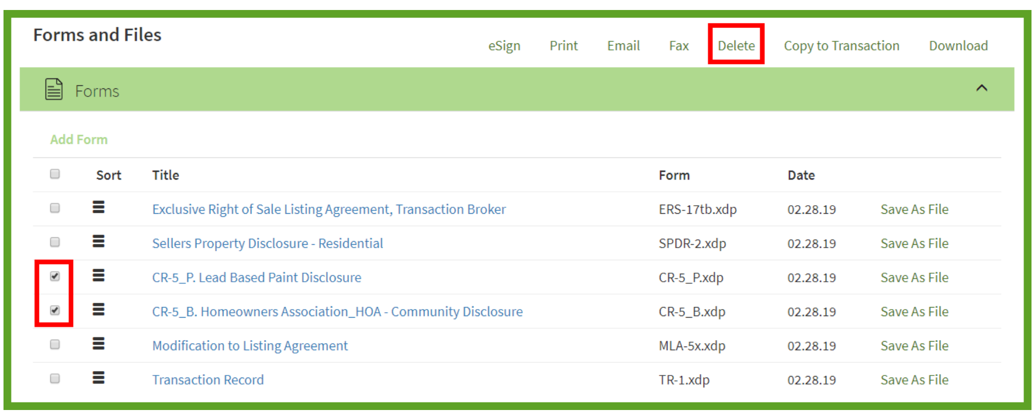
5. After the documents have been faxed to the transaction along with the Cover Page, the faxed documents will be stored in the ***Files*** section of the transaction.

Transactions: Delete Form(s) and/or File(s)

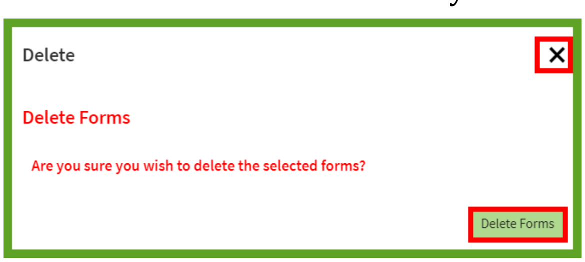
Delete form(s) and file(s) from a transaction when you no longer need the form(s) and/or file(s) in the transaction.

1. Log in and open the transaction.

2. Select the form(s) and file(s) that you would like to delete by placing a check mark on the boxes next to them. Click on **"Delete"** located to the right of the ***Forms and Files*** title.



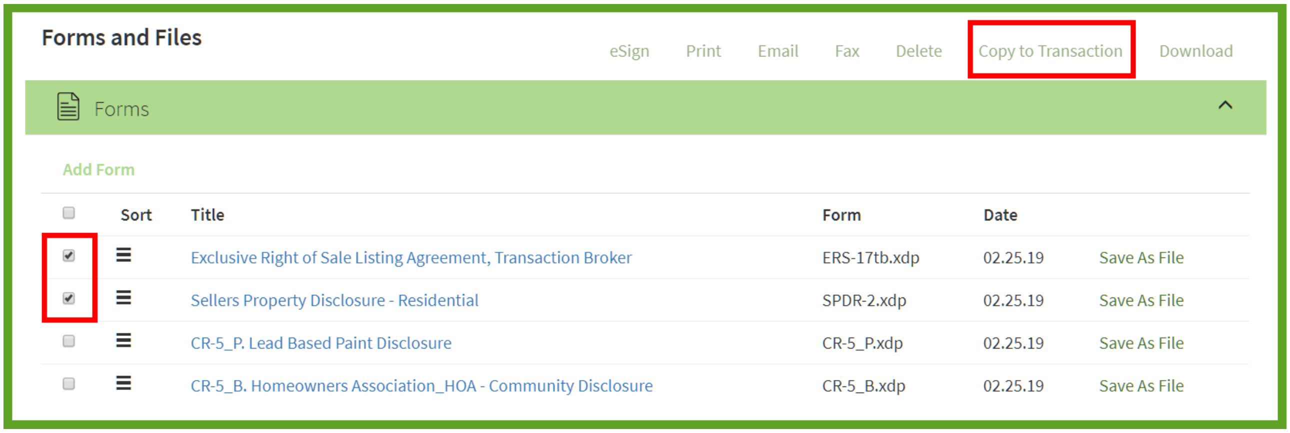
3. A ***Delete*** screen will appear with **Are you sure you wish to delete the selected forms?"** Click on the **"Delete Forms"** button if you want to continue or click on the **"X"** to cancel.



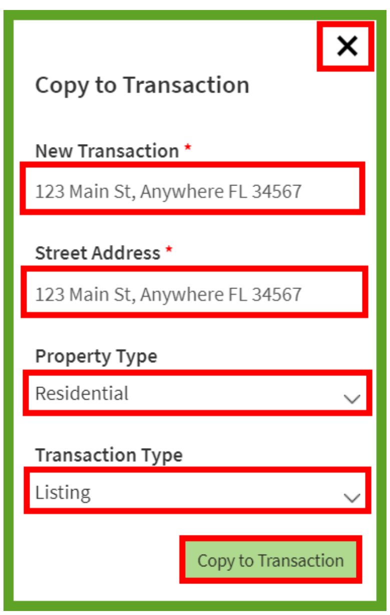
Transactions: Copy to Transaction

1. Log in and open the transaction.

2. Select the form(s) and file(s) that you would like to copy to a new transaction by placing a check mark on the boxes next to them. Click on **"Copy to Transaction"** located to the right of the ***Forms and Files*** title.



3. In the ***Copy to Transaction*** screen, enter the **"New Transaction"**, **"Street Address"**, select the **"Property Type"** and select the **"Transaction Type."** Then click on the **"Copy to Transaction"** button.



4. The new transaction contains the forms and files from the previous transaction.

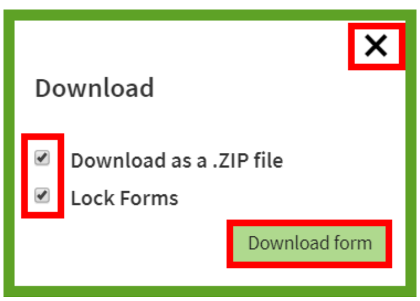
Transactions - Download

1. Log in and open the transaction.

2. Select the form(s) and file(s) that you would like to download by placing a check mark on the boxes next to them. Click on **"Download"** located to the right of the ***Forms and Files*** title.

3. Click on "**DOWNLOAD**" to confirm or **"X"** to cancel the action.

   Hint: By default, the forms are downloaded and saved as a .ZIP file and are locked and cannot be edited.



Notes: ____

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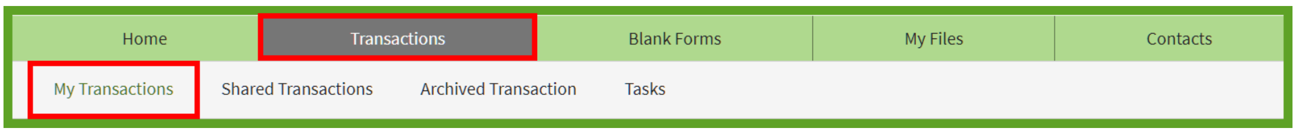
eSign – (*Ultimate Edition feature)*

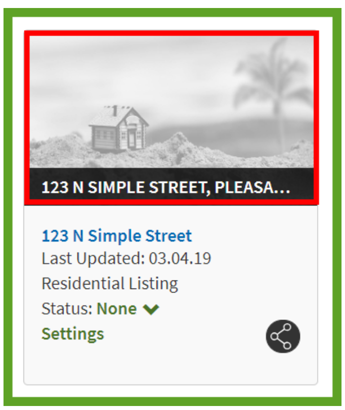
Create an eSign session

Note: Although digital signatures are as valid as "wet" signatures, not all financial institutions choose to accept them. You may wish to confirm that the parties involved in your transactions will accept digitally signed documents before proceeding.

1. Log in and click on **"Transactions**" on the main navigation menu at the top of the Form Simplicity home page. It will automatically take you directly to the ***New Transaction*** screen.

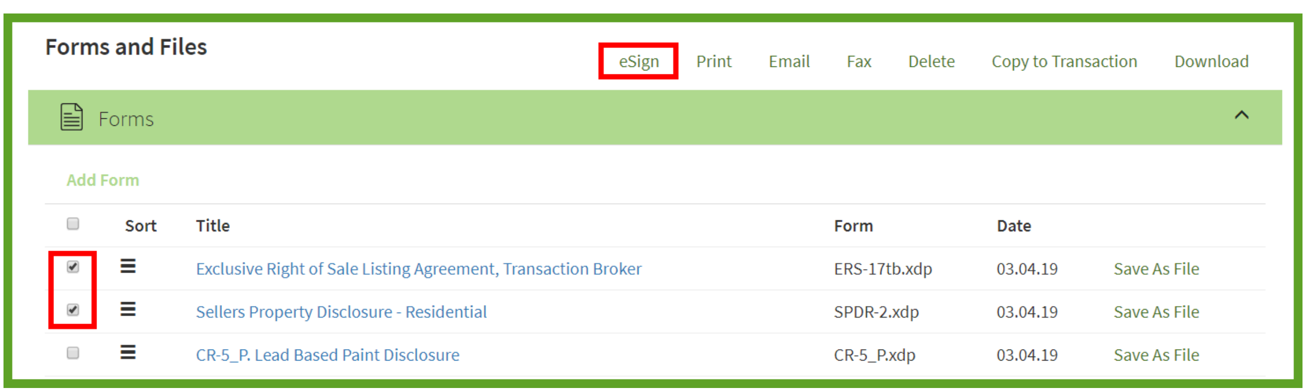


2. Click on the transaction folder that contains the forms or files you need signed.

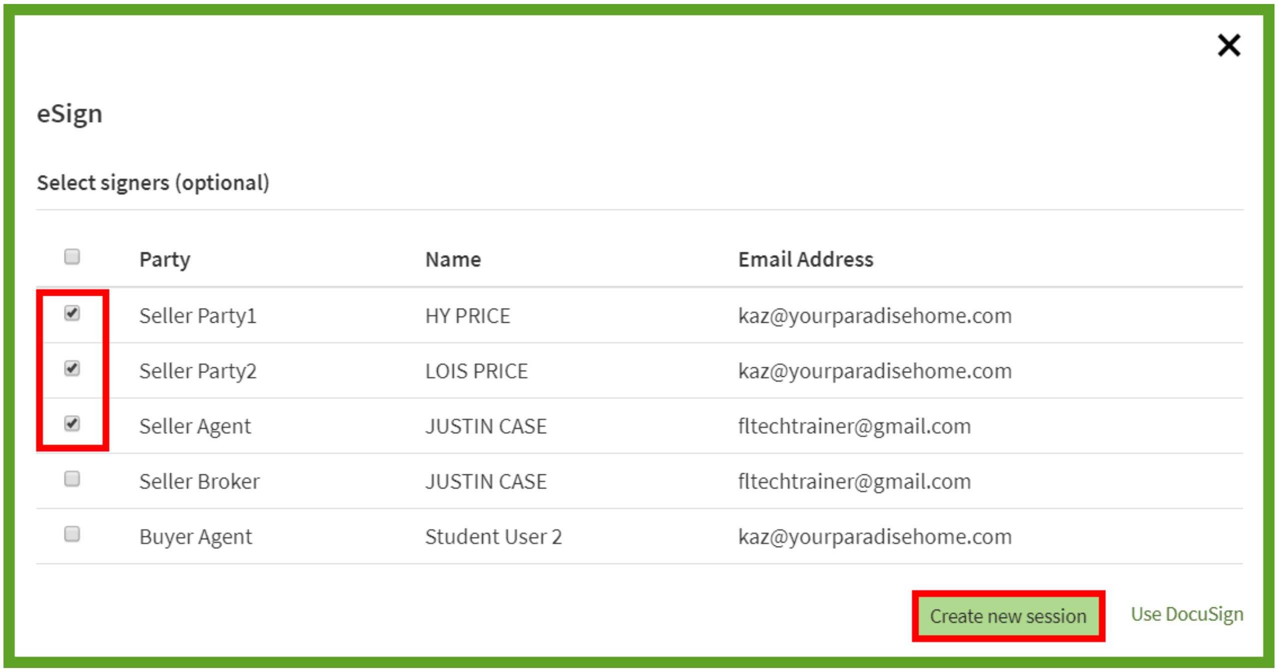


Note: eSign sessions may only be processed through an active transaction. If you have not created an active transaction yet, please follow the instructions in the "Create a new Active Transaction" article first.

3. Select the form(s) and/or files that you wish to have electronically signed by placing a check mark in the box next to their names. Then click on the **"eSign"** link.



4. In the ***eSign*** window, select signers who will be participating in the eSign session by placing a check mark in the box next to their names. Then, click on the **“Create new session”** button.

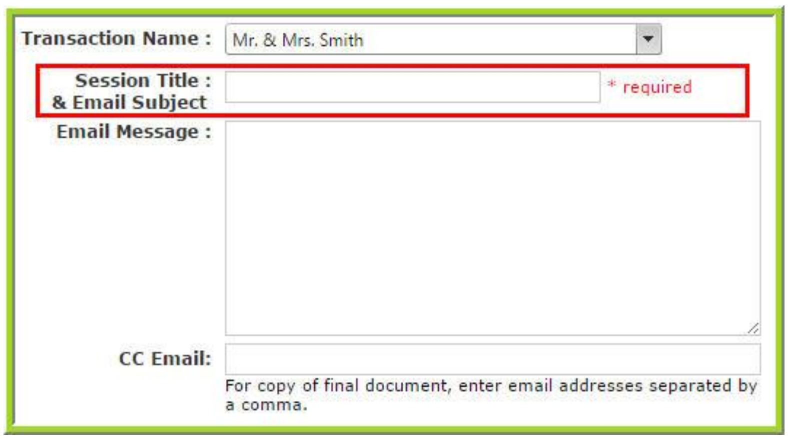


Notes: ____

Six Steps Process for eSign

Step 1 – Signing Session Configuration

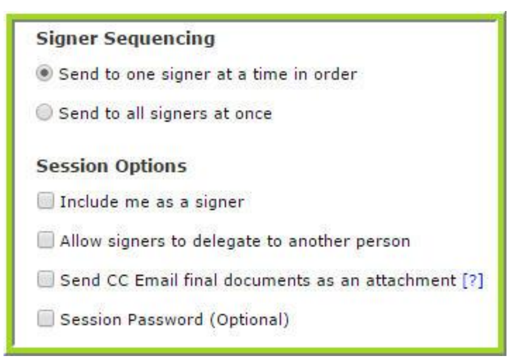
1. Give the session a name or title. *Note: This is the only required field and the following characters may not be used:* ***\ / ? < > : * ” |***



2. Optional: Compose a message for the recipient.

3. Optional: Add the email of a person who should receive a copy of all the signed documents but is not a signer him/herself.

4. Other Options: Signer Sequencing and Session Options.



5. Once you have selected your desired options, click the **“Next”** button in the top right corner.

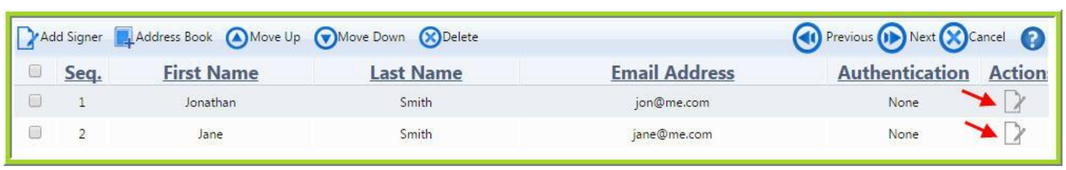
Step 2 – Invite Signers

1. Add the information of all your signers in this step. You may add them one-by-one by clicking **“Add Signer”** or select them from your **“Address Book”** if you added them to your Form Simplicity Contacts previously.

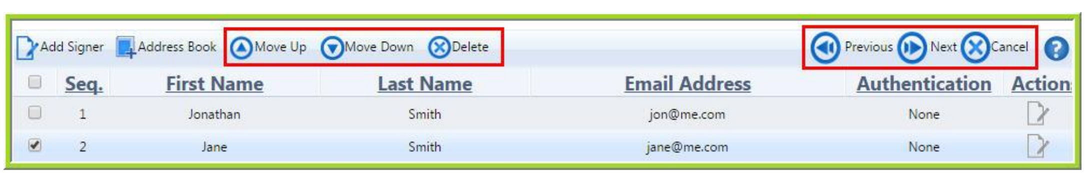
2. If you add the signers one by one, you may select the authentication method as you are entering their contact information.

Note: If you are emailing them the eSign session, the Authentication options are None, KBA (Knowledge Based Authentication), Password, KBA +Password, or SMS text. If you select the “Signing in-person” option, the authentication methods are KBA, KBA +Password or SMS text.

3. To change the authentication method, click on the **“Edit”** icon of your chosen signer located under the **Action** column.



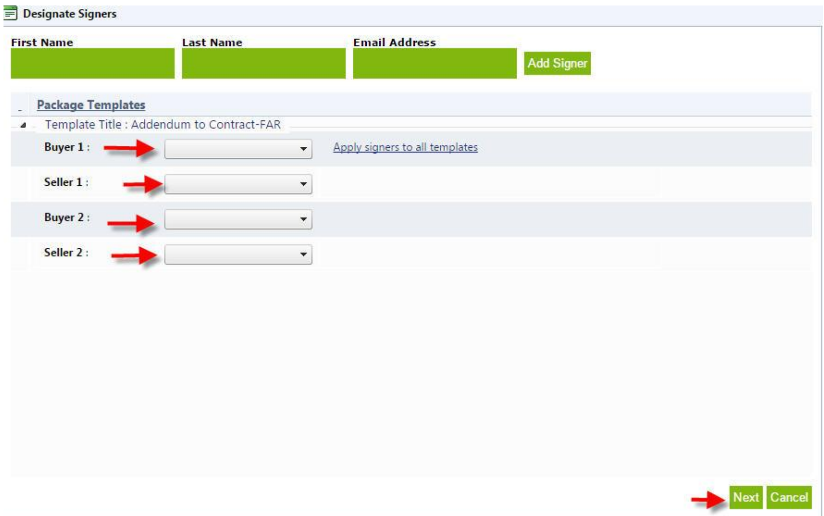
4. Each signer will be assigned their number in the signing sequence. You may change the order of your signers by placing a check mark next to the signer’s sequence # and selecting the “**Move Up**” or “**Move Down**” icons. You may also delete the signer.



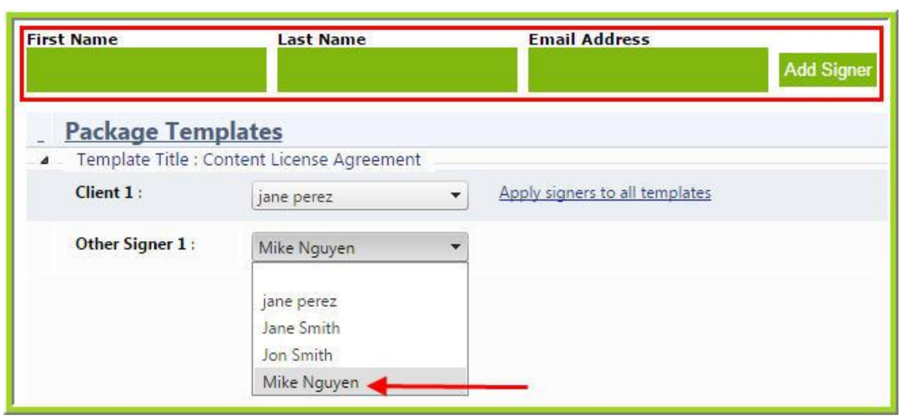
5. Once you have established the signers and their authentication method, click the **“Next”** icon on the top right-hand corner to move to the next step.

Step 3 – Upload Session Documents

1. Because the forms from the Form Simplicity Library are programmed to preassign signers, the **"Designate Signers"** box will pop up. Here you will choose the correct person for the correct title. (i.e. Apply the Buyer's name in the Buyer field, apply the Seller's name in the Seller's field.)

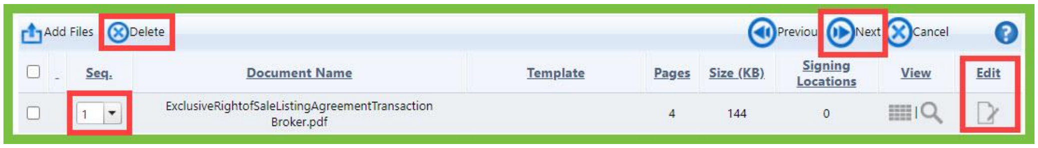


2. You also have one last option to add a signer here. Click **"Next"** when all the fields have been assigned.



3. All the forms that you have in your active transaction will be listed. Place a check mark next to the form(s) you need signed. **(You may also upload a file from your computer, OneDrive, box, or Dropbox by clicking on the "Add Files" icon.)**

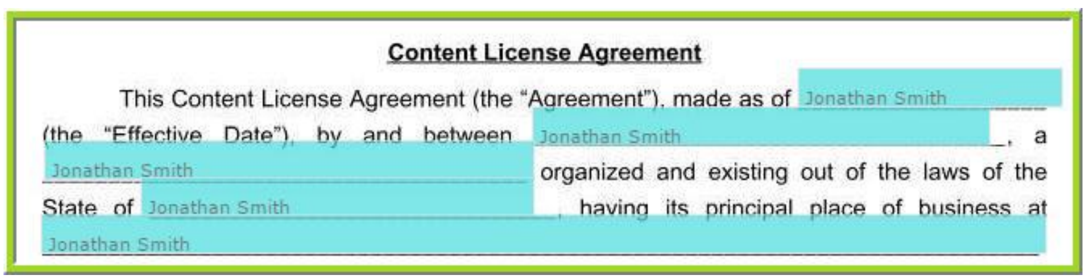
4. You may change the signing sequence of the forms and files by clicking on the sequence drop down arrow to the left of the form or file. You may also **“Delete”** the form or file or click the **“Edit”** icon and rename the form or file.



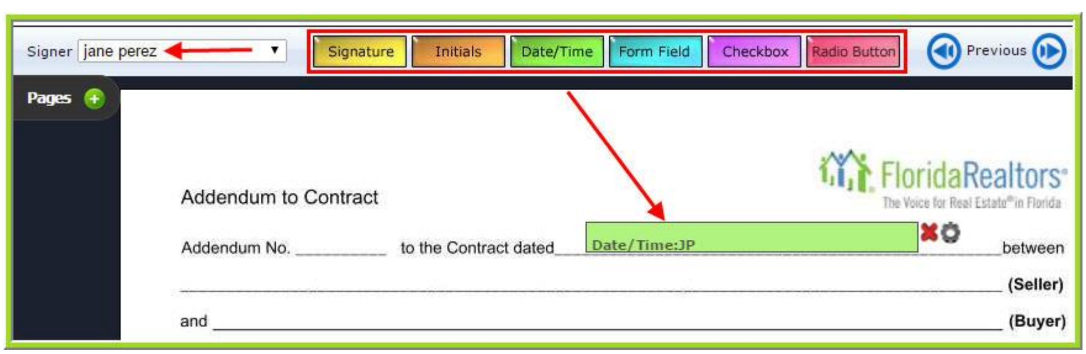
5. Click the **“Next”** icon once you are ready to move to the next step.

Step 4 – Add Signing Location

Forms that received the pre-assign option in step 3 will auto-populate the name of the person responsible for filling out the fields right away.



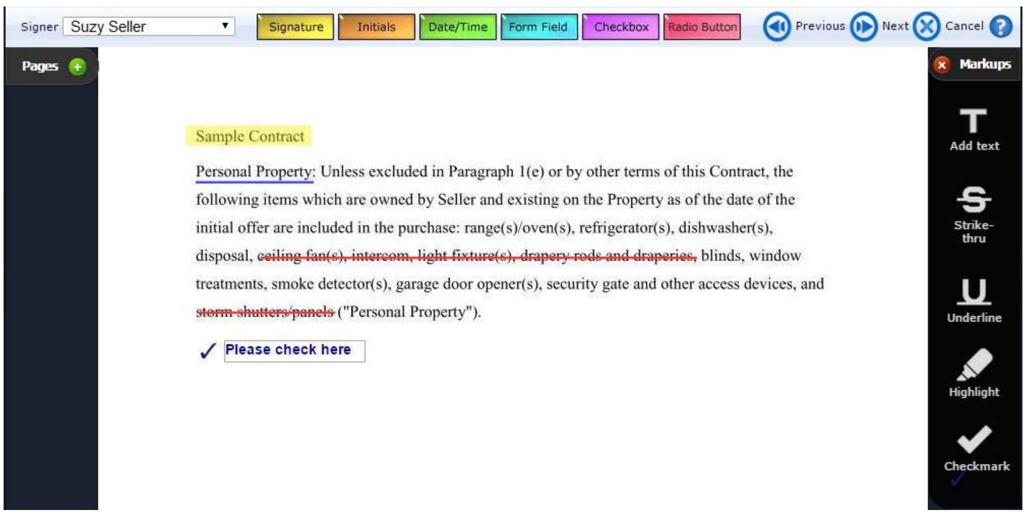
1. Files that did not have the preassigned option in step 3 (e.g. files you uploaded) will give you the opportunity to manually assign the fields. Simply select the name of the person who should fill out the field from the drop down menu on the right hand corner, then click the action they should take and drag & drop it to the necessary location.



Continue assigning all the actions needed. *Note: You may re-size the boxes by clicking and dragging the edges, the red “x” will allow you to delete that action, and the gray ring will allow you to determine whether it is a required, optional, or conditional field.*

2. You also have the ability to Markup your documents using the same drag & drop function. Click **"Markups"** on the right side of the page.

3. Select the **Markup** tool from the menu bar on the right side of the page and apply it to the document.



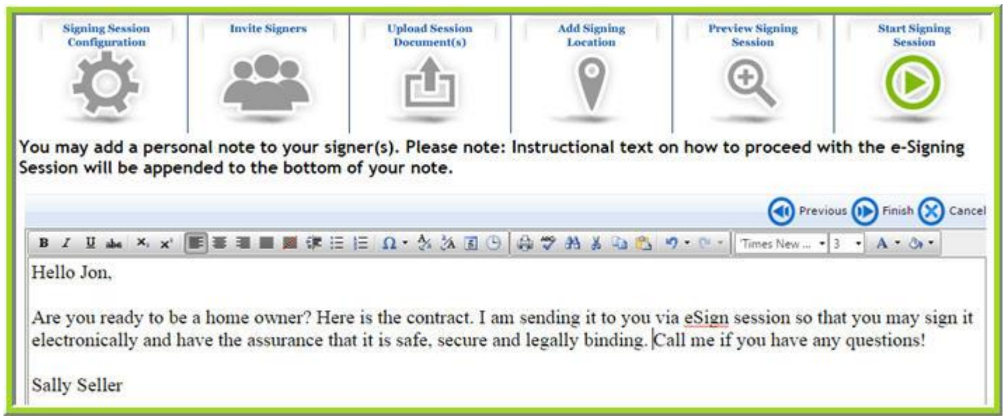
4. When all the pages of your forms and files are ready, click **"Next"** to move to the next step.

Step 5 – Preview Signing Session

This gives you the opportunity to review your forms as the recipients see it and go back to the previous step if needed or click **"Next"** to move on to the last step.

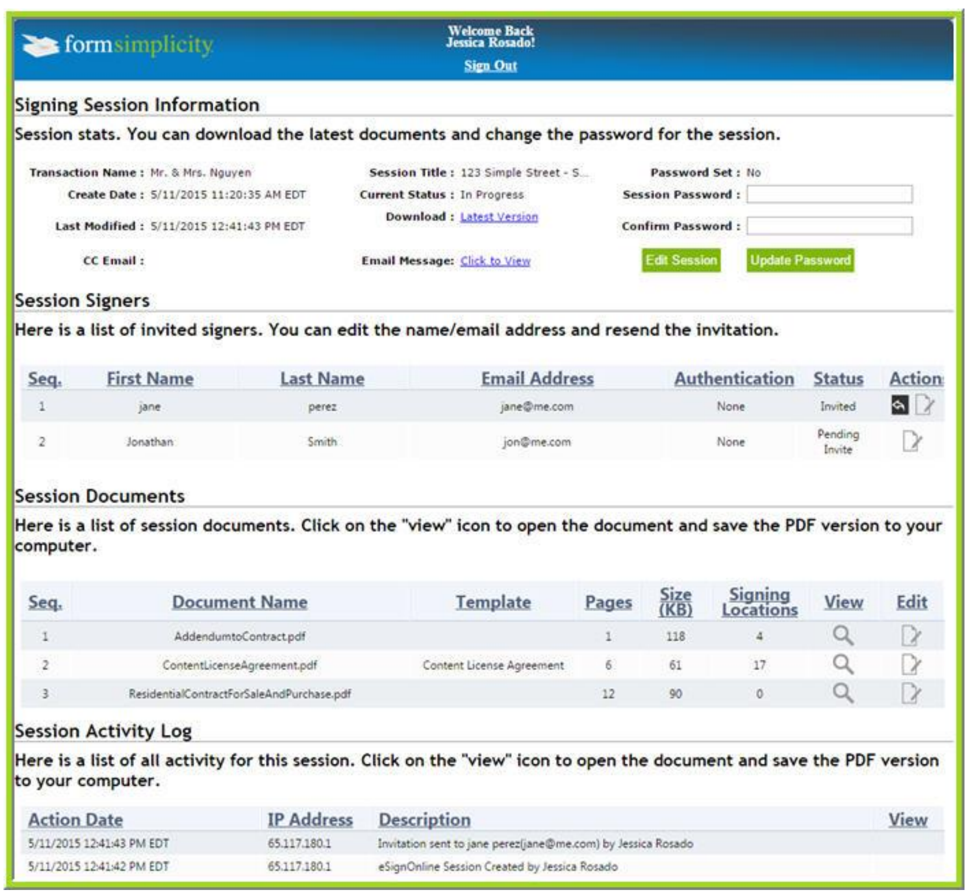
Step 6 – Start Signing Session

1. This step will bring you back to the email message you composed on Step 1 in case you want to add any additional instructions.



2. Click **"Finish"** to send the eSign session to your clients.

   The Activity Log will populate to show you the current status of your eSign session. Click **"Sign Out"** at the top of the page to exit.

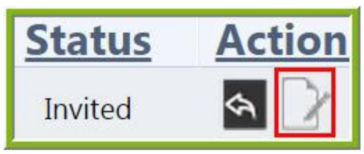


3. To access the Activity Log again, please read the **"Track the Progress of Your eSign Session with the Activity Log"** article.

4. When all the signers have eSigned the documents, you will receive an email notification that the eSign session has been completed.

5. In a signer has not received an invitation, locate your signer and its corresponding Action icons on the right side of the page.

6. Optional: If you would like to fix the email address or use a different email address before resending the eSign session, click on the Edit icon and make the necessary changes.

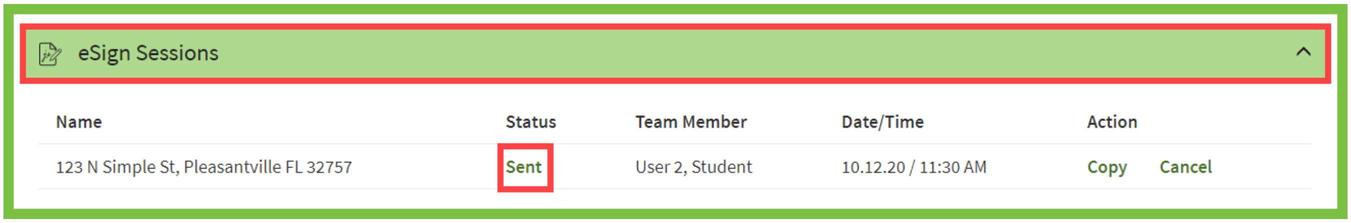


7. Click on the **"Resend"** icon and a new invitation will be sent to your signer.

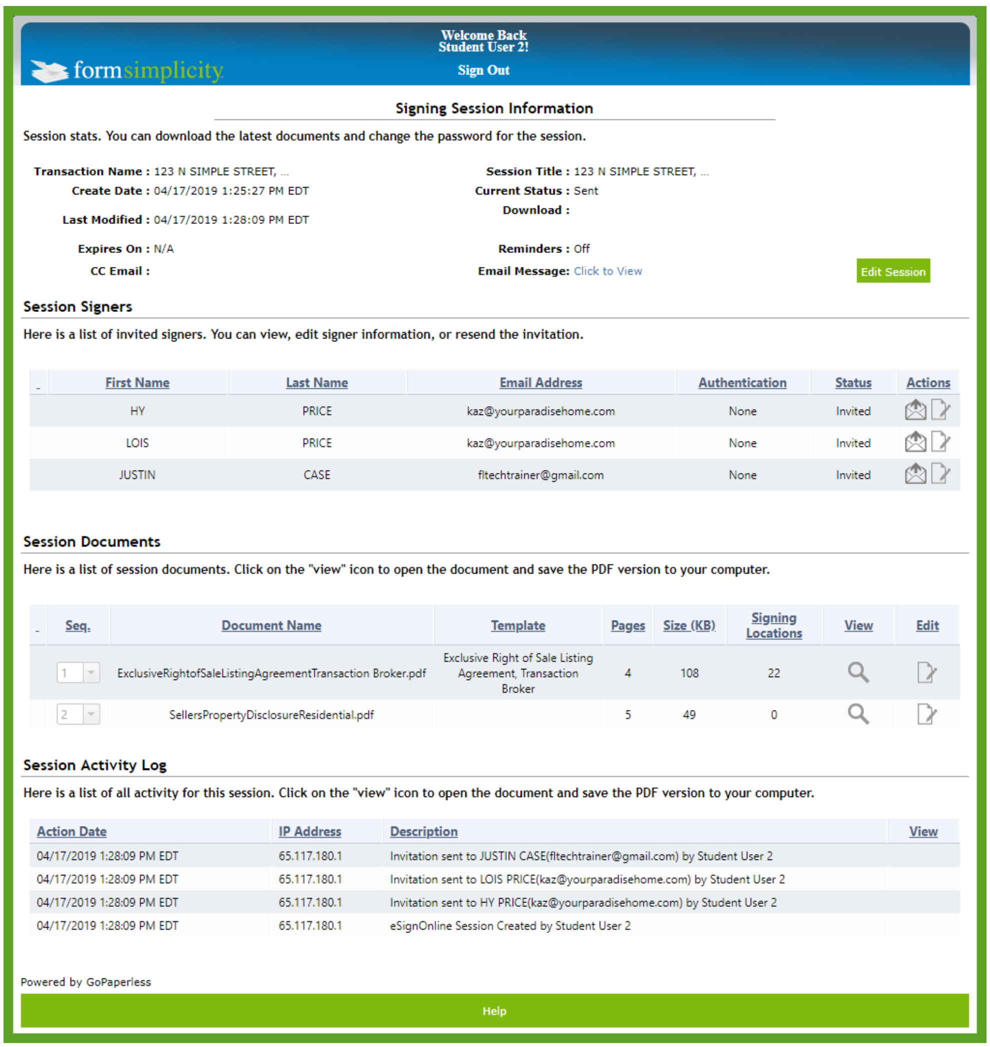
Notes:

eSign - Checking the Status of Your eSign Session

1. Click on the ***eSign Sessions*** section to expand and view your eSign sessions. Click on **"Sent"** in the ***Status*** column to track the status of the eSign session.



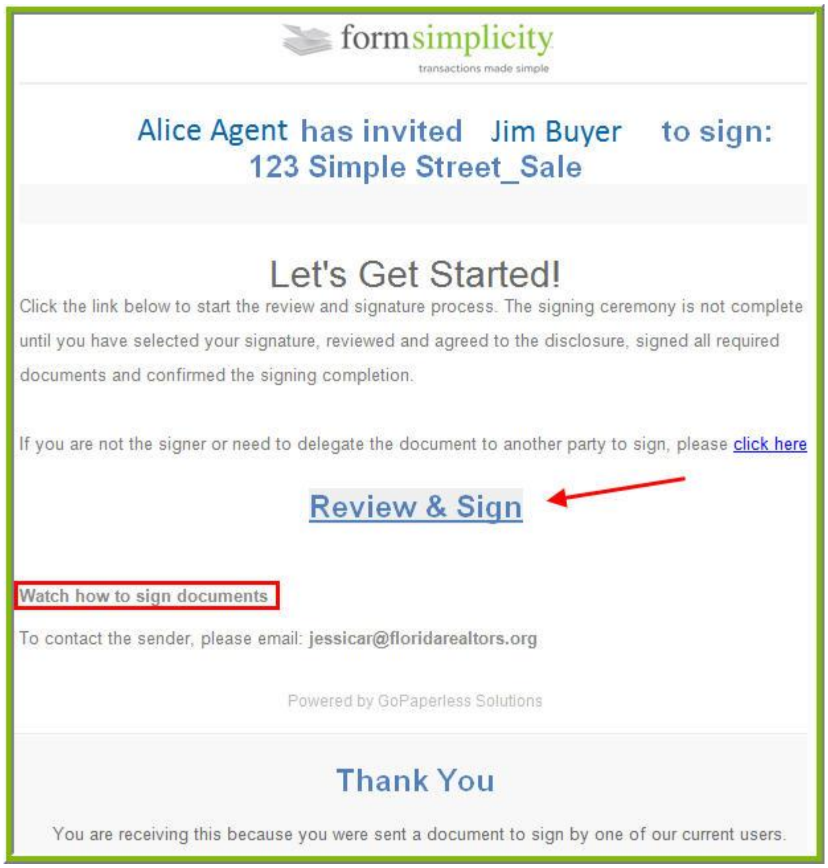
2. The eSign session's activity page will populate and at the bottom of the page you will find the **"Session Activity Log"**.



This log will allow you to see where in the process your eSign session is.

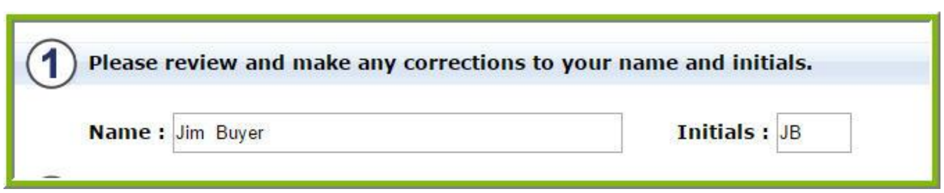
eSign – Client's Perspective

1. After you prepare and send your eSign session, your client will receive an email invitation similar to the example below. They will click on the **"Review & Sign"** link.



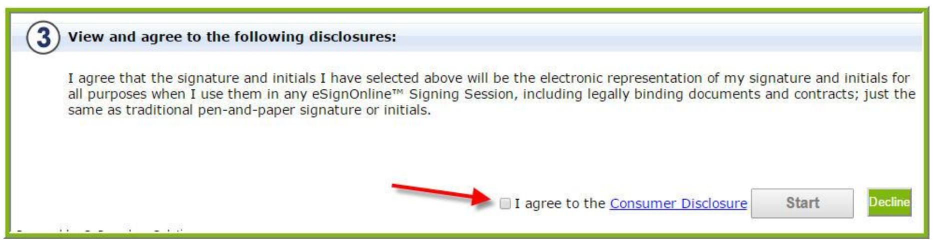
Note: Your client can watch a 5 min. instructional video that will walk then step by step on and eSign signing.

2. Then, they confirm name is spelled correctly.



3. Create a signature by either choosing a predefined signature or drawing their own.

4. Agree to the Consumer Disclosure and click the **"Start"** button.



5. The forms you sent them to sign will populate. They will click on all the required locations assigned to them.

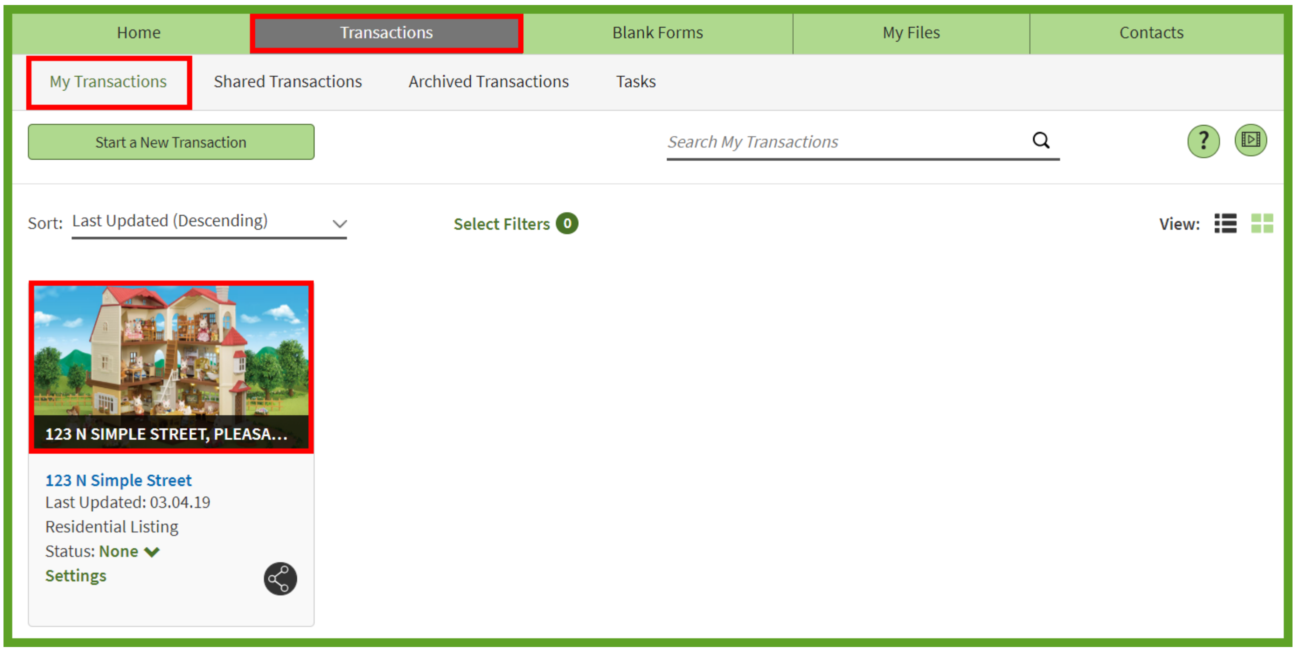
6. Once all locations have been clicked, they will be prompted to finish the session. Click the **"Yes"** button.

7. Once the e-sign session is completed by all parties, and an email with the completed files will be sent to all. Additionally, the signed documents will be stored in the Files section of the corresponding active transaction.

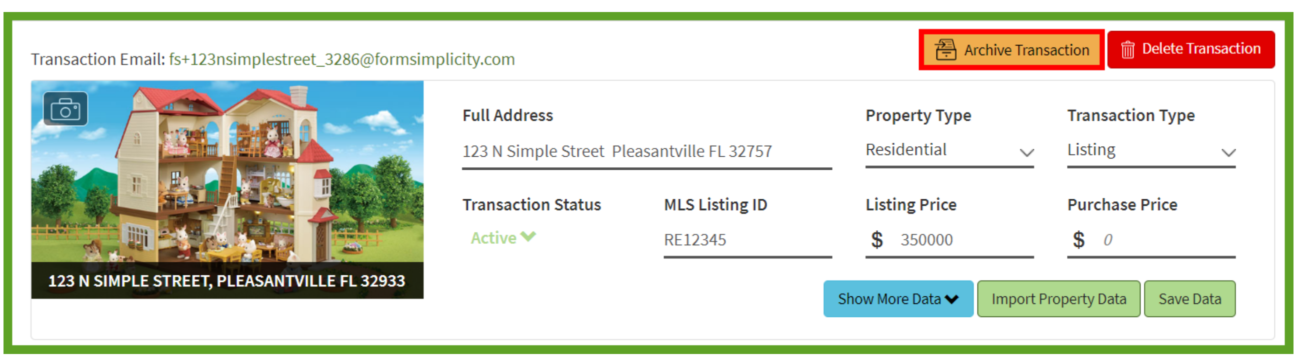
Transactions - Archive Transaction

When a transaction is completed and you no longer require access to it in Form Simplicity, you can archive it to a long-term storage location

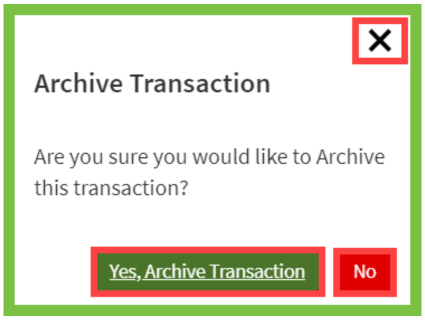
1. Log in and click on **"Transactions"** from the main navigation menu at the top of the Form Simplicity home page which will automatically take you directly to the ***My Transactions*** screen. Then locate the transaction that you wish to archive and open it.



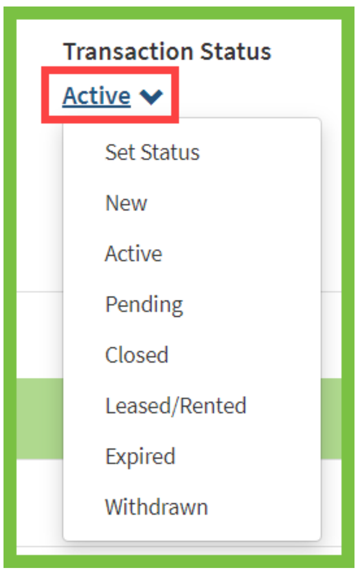
2. In the upper right-hand corner of the transaction record, click on the **"Archive Transaction"** button.



3. A new box will open asking **"Are you sure you want to Archive this transaction?"**. Click on the **"Yes, Archive Transaction"** button to archive the transaction, click on the **"No"** to not archive the transaction or click on the **"X"** to cancel the action.



4. Click on the ***Transaction Status*** drop down menu to ***Set Status*** to **"Closed."**

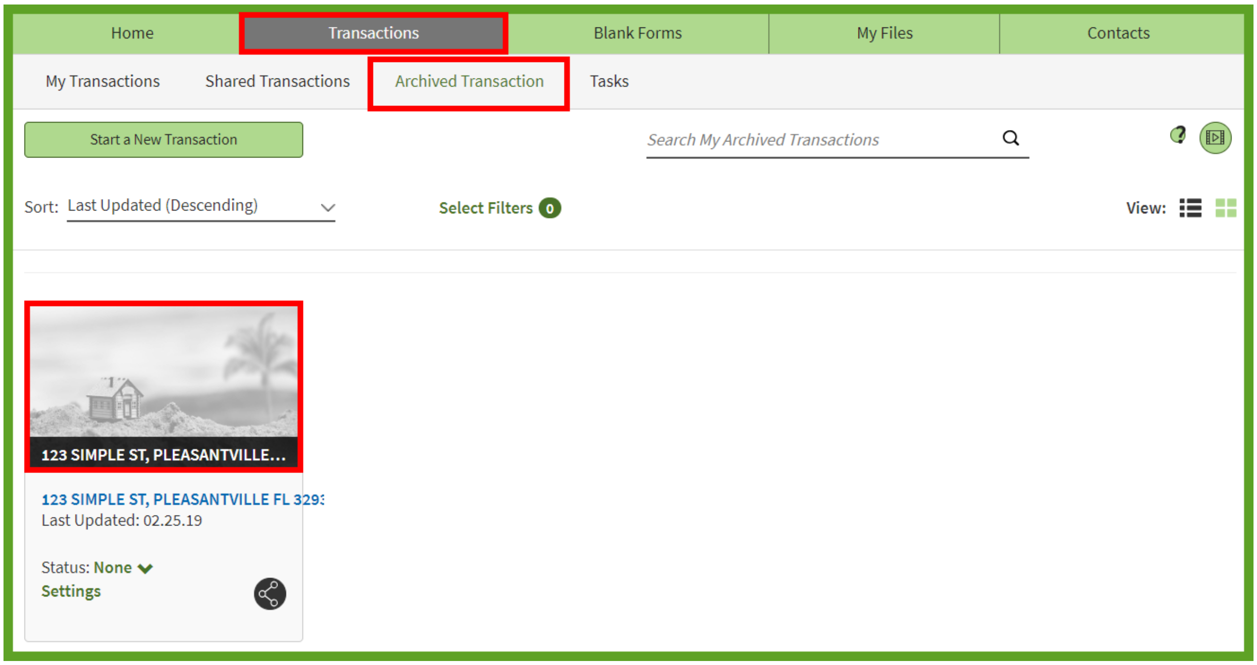


5. This will move the transaction and all its contents to the Archived Transactions for long-term storage.

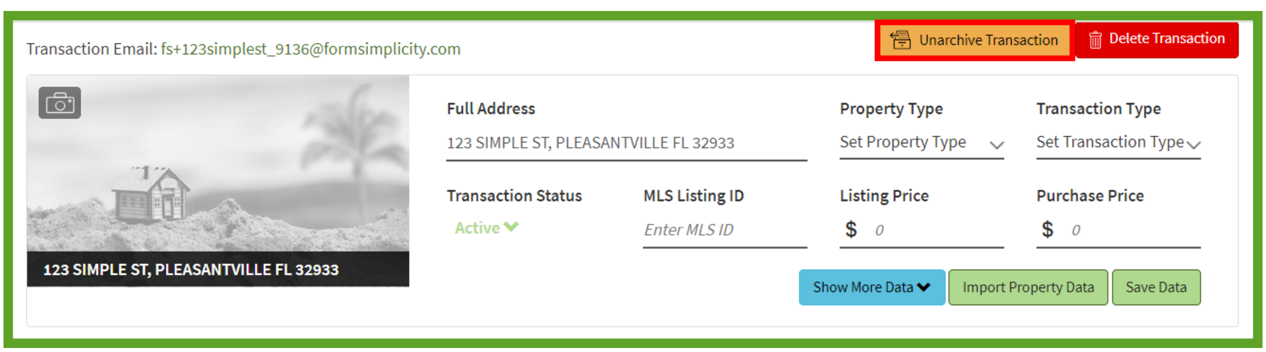
Transactions – Unarchived Transaction

If additional files must be added to an archived transaction, that transaction needs to be restored by unarchiving it.

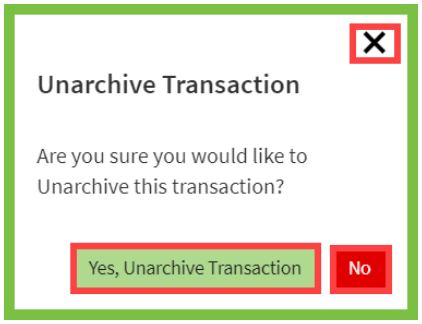
1. Log in and click **"Archived Transactions"** from the ***Transactions*** secondary navigation menu at the top of the Form Simplicity home page. Then locate the transaction that you want to make Active again.



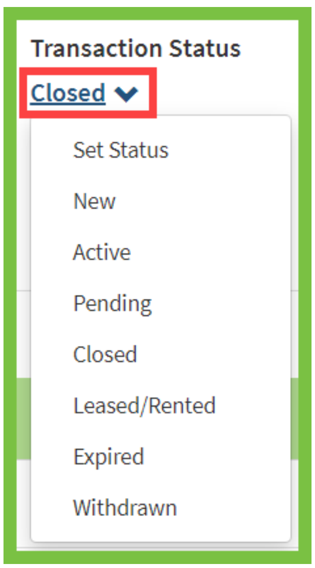
2. In the top right corner of the transaction record, click on the **"Unarchive Transaction"** button.



3. A new window will open asking **"Are you sure you want to Unarchive this transaction?"**. Click on the **"Yes, Unarchive Transaction"** button to archive the transaction, click on the **"No"** to not archive the transaction or click on the **"X"** to cancel the action.



4. Click on the ***Transaction Status*** drop down menu to ***Set Status*** to **"Active."**



5. This will move the transaction and all its contents back to **"ACTIVE."**

Order Forms Programming

Brokerages, Associations/Boards, and MLSs who would like to add their own forms to their Form Simplicity Library, may order forms programming.

This is particularly beneficial when you

- have proprietary forms that your agents or members need to access and use regularly
- want to ensure the most up-to-date versions of your forms are accessible
- have forms that require accurate calculations and want to eliminate possible human error
- want to reduce paper and printing costs
- want to reduce the need for paper file storage space

To place an order for Forms Programming, click on this URL: **http://www.formsimplicity.com/forms-ordering/**. There is no limit (Maximum or Minimum) to the number of forms we can program for you, and you can request revisions to your forms at any time. Additionally, you will always have the opportunity to review and approve your finished forms before they are available to your members or agents in your Library. Price for programming varies according to the number of pages, fill-able fields, calculations, and customization that the form requires.

Your online-accessible forms will reduce printing and storage costs and help your agents or members manage real estate transactions electronically from start to finish.