
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

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.

The image displays three screenshots of the Form Simplicity user interface, illustrating the login and registration process. Each screenshot is enclosed in a green border, and key elements are highlighted with red boxes.

Top Left Screenshot: The 'Welcome to Form Simplicity' login page. It features a 'User ID' input field, a 'Password' input field with a visibility toggle (eye icon), a link 'I would like to reset or register my password.', and a 'Log-in' button.

Top Right Screenshot: The 'Password Registration / Reset' page. It includes a '< Back to Sign-in Page' link, a 'Name Search' section with input fields for 'Cisowski', 'Kaz', and 'Florida' (with a dropdown arrow), and a 'Find Me' button. A red box highlights a support section on the right with the text 'Have questions? We can help!' and contact information: 'CALL US 407.587.1450', 'Questions or Support', 'CHAT NOW', 'EMAIL US', and 'Click here'.

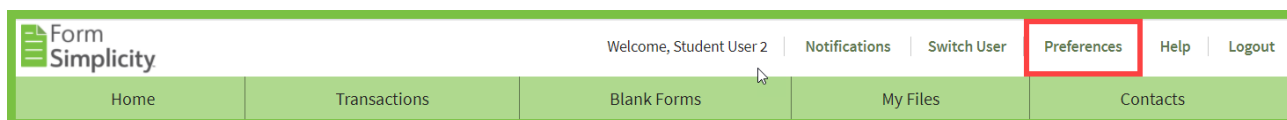
Bottom Screenshot: A continuation of the 'Password Registration / Reset' process. It shows a '< Back to Name Search' link, the title 'Password Registration / Reset', and a 'Select Member Name' dropdown menu. A 'Select' button is at the bottom. The same support section with contact information is visible on the right.

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.

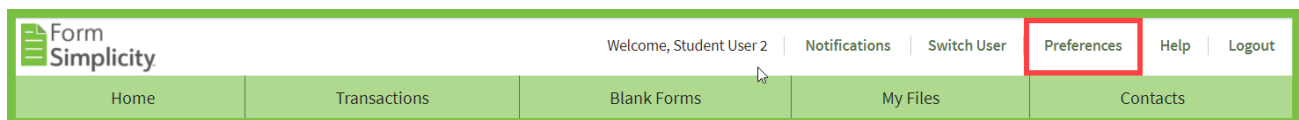
A screenshot of the 'General Settings' form in the Form Simplicity application. The form has a green header with the title 'General Settings' and an upward arrow. Below the header, there are two main sections. The first section is 'Time Zone', which has a dropdown menu currently showing 'Eastern Time (Orlando, Atlanta, Boston)'. The second section is 'Email Signature', which has a text area containing a sample signature: 'Kaz Cisowski, Technology Training Manager | FormSimplicity, 7025 Augusta National Drive, Orlando, FL 32822, talk: 407.438.1400, ext. 2746, fax: 407.438.1411, visit: http://www.formsimplicity.com'. Below the text area is a note: '(automatically included in all outgoing emails, collaboration invitations and eSign sessions)'. At the bottom of the form is a green button with white text that says 'Save changes'.

Notes: _____

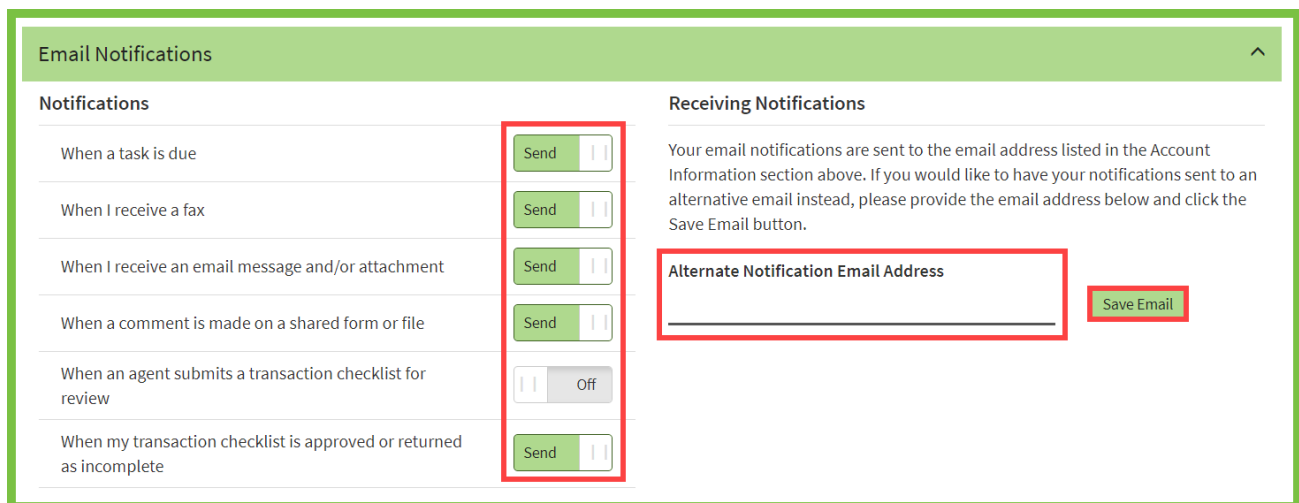
My Preferences: Email Notifications

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.



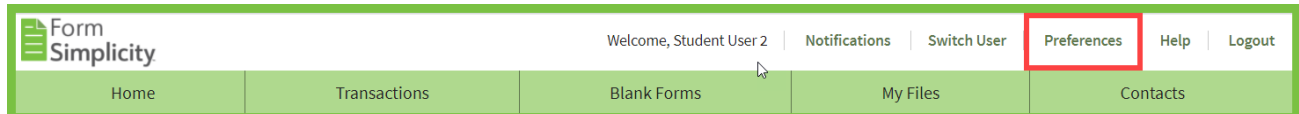
*Note: Email notifications are sent to the email address that is on file with your association. If you would like to have your notifications sent to a different email address, type it in the Email Address field and click the **"Save Email"** button.*

Notes: _____

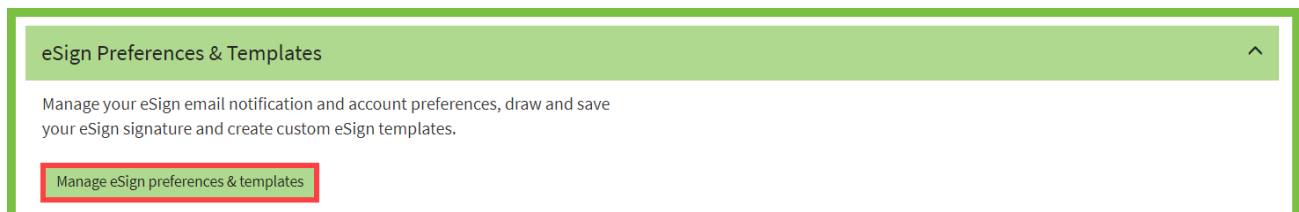
eSign Preferences & Templates: Personal Preferences

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.

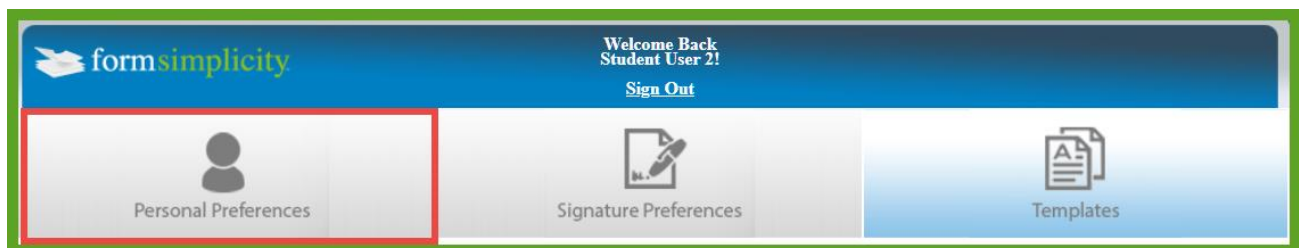
1. To manage your eSign email notification and account preferences, log in to Form Simplicity and click on the **"Preferences"** link in the upper right side of the Form Simplicity home page.



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.



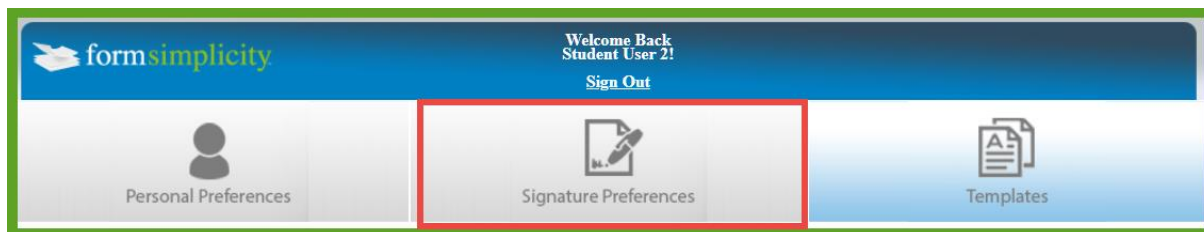
4. By checking/unchecking the **Session Started** and **Session Viewed** boxes, you can select which email notifications that you would like to receive during the eSign session process. *Note: The default Email Notification that is checked is **Session Signed**.* After you check the appropriate boxes,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

The screenshot shows the 'Email Notifications' and 'Account Settings' section. The 'Email Notifications' section is highlighted with a red box and contains three checkboxes: 'Session Started' (checked), 'Session Viewed' (checked), and 'Session Signed' (checked). The 'Account Settings' section contains two dropdown menus: 'Time Zone' (set to 'Eastern Standard Time') and 'Date Format' (set to 'MM/DD/YYYY'). Below these sections is a note: 'Note: Email notifications for declined, delegated and completed sessions are required and enabled for your account.' At the bottom left is the text 'Powered by GoPaperless' and at the bottom right is a red button labeled 'Update Preferences'.

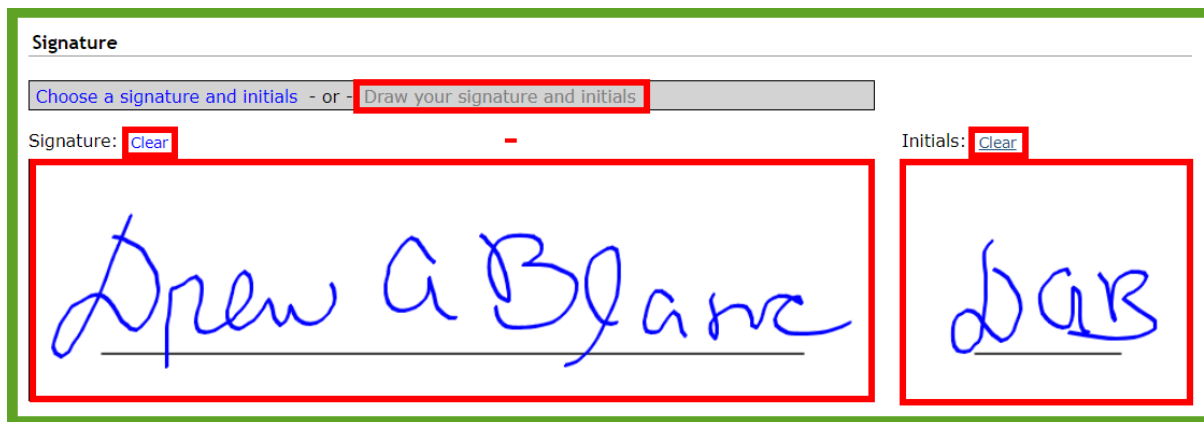
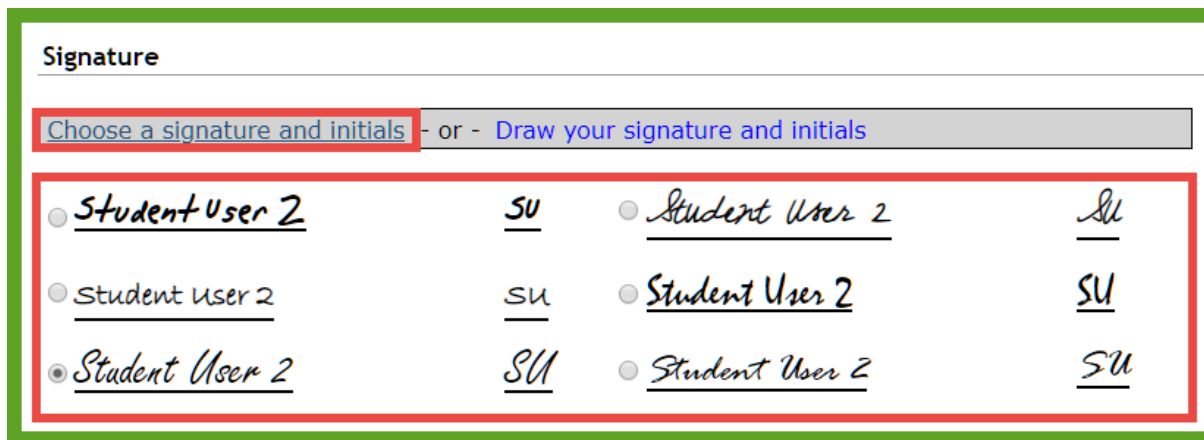
eSign Preferences & Templates: Signature Preferences

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.



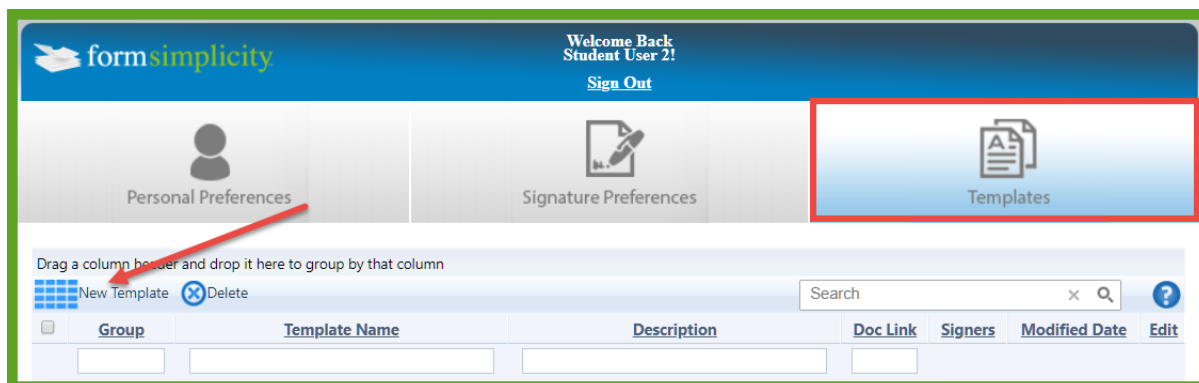
2. Below shows that you can either select “Choose a signature font and initials” or “Draw your signature and initials” when eSigning. You can also set up your email signature you send during the signing process. Then click the “Update Preferences” button when done.



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.

The screenshot shows the 'Template Details' form. It has fields for 'Title' (with a red arrow pointing to it), 'Group (optional)', 'Description' (with a red arrow pointing to it), and 'Signer Roles' (with a red arrow pointing to it). The 'Signer Roles' section has a table with columns 'Seq.', 'Role', and 'Delete'. Below this is a 'Document' section with a 'Choose File' button (highlighted with a red box), the filename 'New Listing Checklist.pdf', and 'Save Details' and 'Close' buttons.

The screenshot shows a dropdown menu titled 'Type in a role or choose from the list below'. It lists the following roles: Agent, Borrower, Broker, Buyer, Buyer's Agent, Buyer's Broker, Client, Cosigner, and Employee.

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.

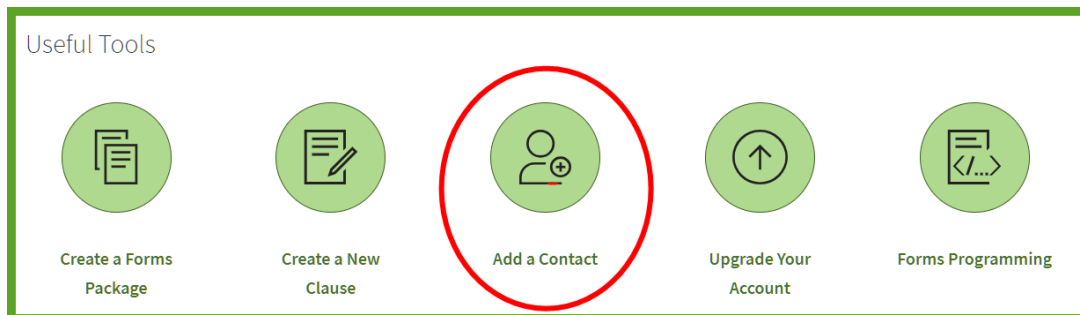
Group	Template Name	Description	Doc Link	Signers	Modified Date	Edit
	New Listing Checklist	Used for Residential Listing Transactions		3	01/07/2019	

Notes: _____

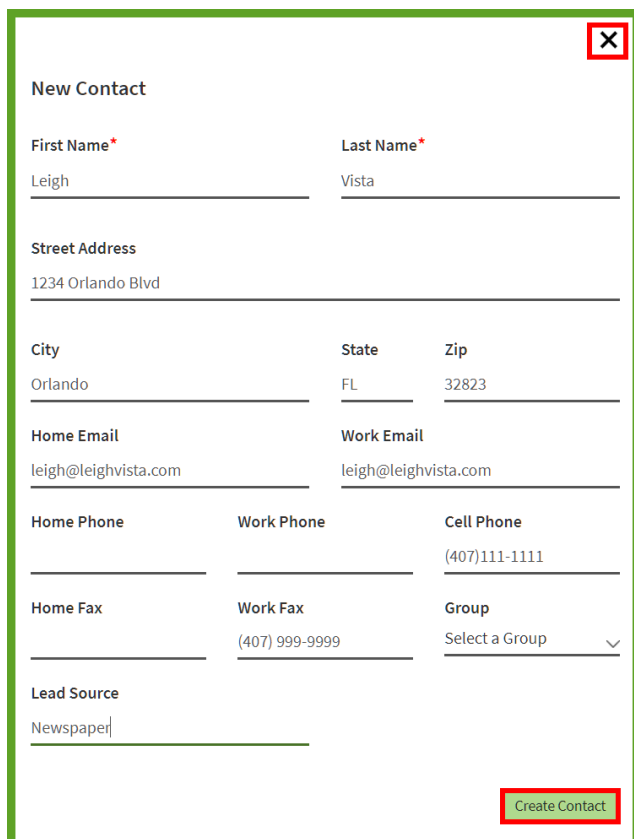
Contacts: Add a Contact

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.



New Contact

First Name* Last Name*

Leigh Vista

Street Address

1234 Orlando Blvd

City State Zip

Orlando FL 32823

Home Email Work Email

leigh@leighvista.com leigh@leighvista.com

Home Phone Work Phone Cell Phone

(407) 111-1111

Home Fax Work Fax Group

(407) 999-9999 Select a Group

Lead Source

Newspaper

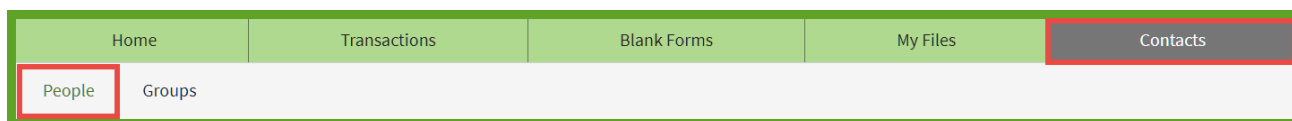
Create Contact

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.

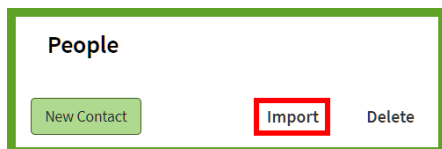
Contacts: Import Contacts

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.

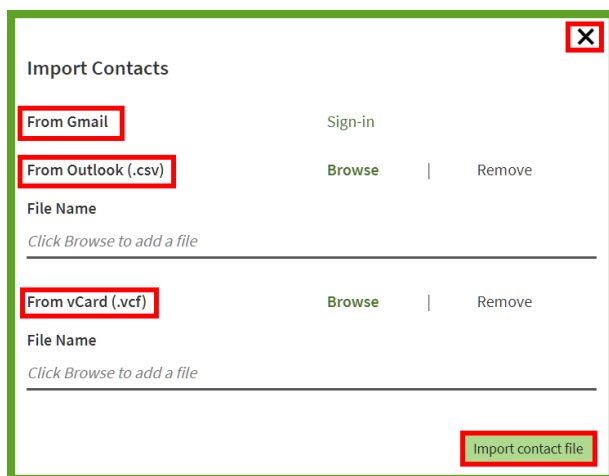
1. Log in and select **“Contacts”** from the main navigation menu at the top of the Form Simplicity home page. This will automatically open the **“People”** section.



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



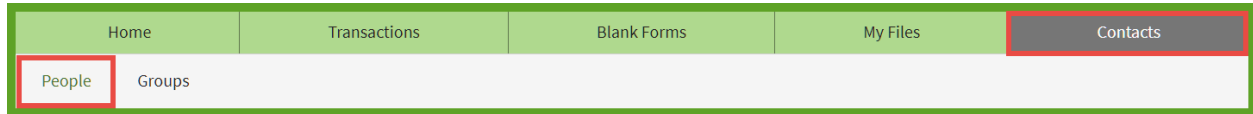
3. The three sources are:
 - Your Gmail Account
 - Your Outlook Contacts
 - Your vCard Contacts



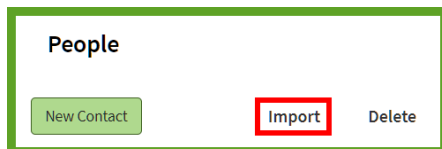
4. After importing from any of the above sources, click on the **“Import contact file”** button in the lower right corner of the **Import Contacts** screen. If you wish to cancel, click on the **“X”** symbol in the upper right corner.

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.



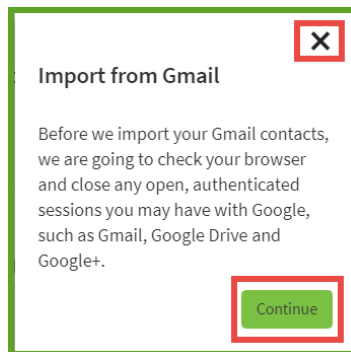
2. Click on the “**Import**” link.



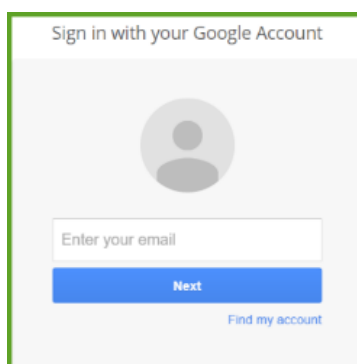
3. Click on the “**Sign-in**” link to the right of *From Gmail*.



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



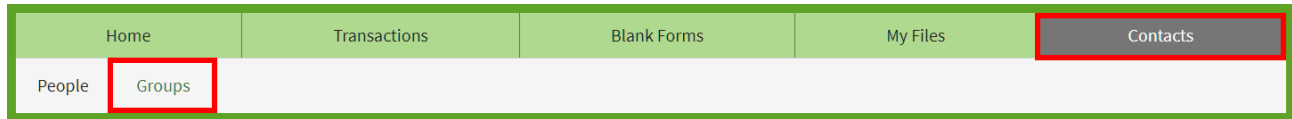
5. Enter your Gmail address and password, then click the “**Next**” button to import all your Gmail contacts into Form Simplicity.



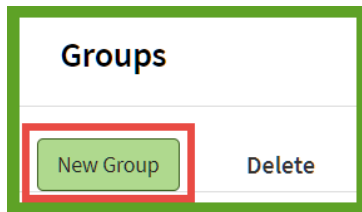
Note: This is not a Data Sync. This is a one-way import of the Google contacts. If a change is made in one location in the future, it will not automatically sync to the other.

Groups: New Group

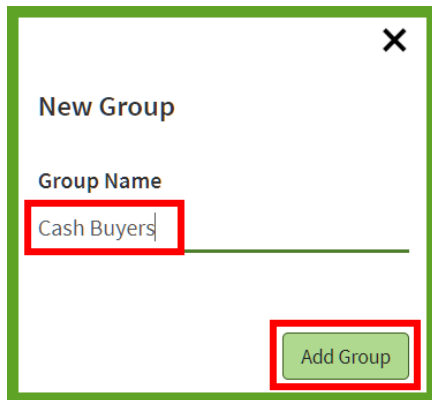
1. To create a group name, log in and select **“Contacts”** from the main navigation menu at the top of the page. Then click on **“Groups”** in the **Contacts** secondary navigation menu.



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



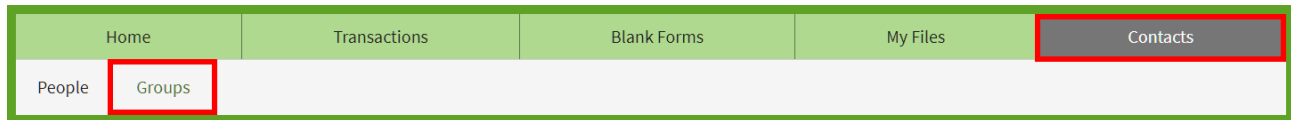
3. Assign a name to your group and click the **“Add Group”** button.



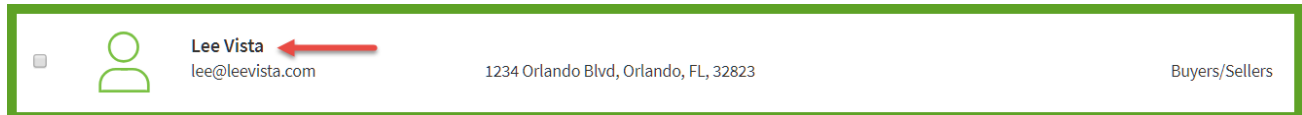
Notes: _____

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.



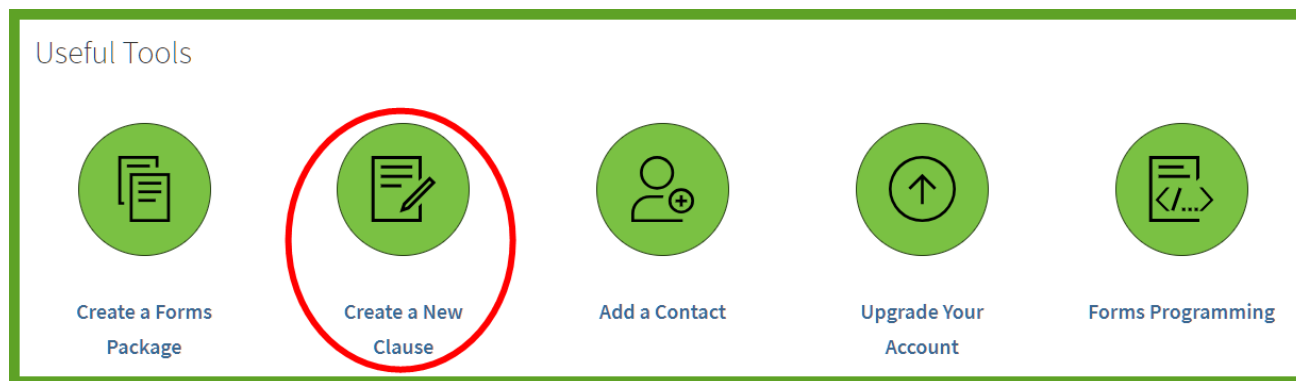
3. Once you locate the contact, click on their name to open their contact information. Go towards the bottom right of the contact record and click on the “**Group**” drop-down and select a group. After you selected a group for your contact, click on the “**Update Contact**” button on the lower right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

A screenshot of the 'Edit Contact' form. The form contains fields for 'First Name' (Lee), 'Last Name' (Vista), 'Street Address' (1234 Orlando Blvd), 'City' (Orlando), 'State' (FL), 'Zip' (32823), 'Home Email' (lee@leevista.com), 'Work Email' (lee@leevista.com), 'Home Phone', 'Work Phone', 'Cell Phone' ((407) 555-1212), 'Home Fax', 'Work Fax' ((407) 999-9999), and 'Lead Source'. A red box highlights the 'Group' dropdown menu, which currently shows 'Cash Buyers'. Another red box highlights the 'Update Contact' button at the bottom right of the form.

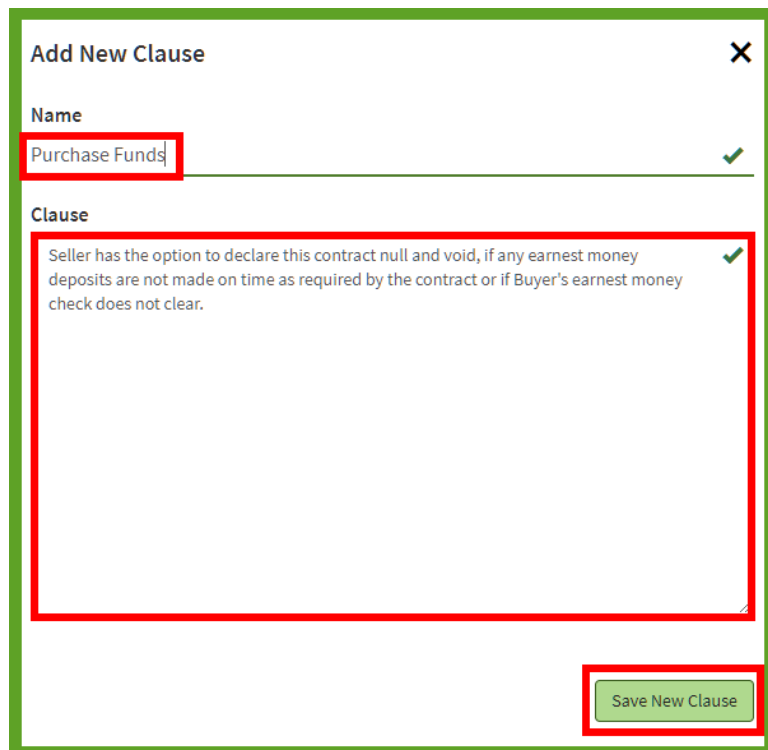
Clauses: Create a New Clause

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.*



- 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

Add New Clause Delete

EXPAND ALL / COLLAPSE ALL

Brokerage Wide

<input type="checkbox"/> Name	
Seller Will Pay Clause	Preview
SOILS CONDITION - EXAMPLE OF DISCLOSURE	Preview
BUYER DEPOSITS NOT TIMELY	Preview
PURCHASE FUNDS	Preview
Santa Clause 100	Preview
Personal Property Items	Preview

Personal

<input type="checkbox"/> Name	
<input type="checkbox"/> Purchase Funds	Preview Edit
<input type="checkbox"/> Escrow Address 1	Preview Edit
<input type="checkbox"/> Escrow Agent Company	Preview Edit

Clauses: Insert Clause

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

PURCHASE FUNDS

Insert Clause

- 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.

14. Additional Terms: If Buyer's initial deposit and/or any additional deposits required under the contract are not received by escrow by the time period specified in the contract, Buyer will be considered in default, and Seller may exercise the Seller's remedies in the contract. Time is of the essence in the payment of these deposits.

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.

Home Transactions **Blank Forms** My Files Contacts

Forms Library Forms Packages Clauses

Sort by: Title (A-Z) Search Forms Library

Add to Transaction Print Email Download

Florida

Fannie Mae

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 Forms Packages Clauses

Sort by: Title (A-Z) Search Forms Library

Add to Transaction Print Email Download

Florida

	Title	Form	Type	Last Updated
<input type="checkbox"/>	AS IS Residential Contract for Sale and Purchase	FloridaRealtors-FloridaBar-ASIS-5x.xdp	Florida Realtors Contract for Residential Sale and Purchase	14 JUN 2019
<input type="checkbox"/>	Addendum to Contract	ACSP-4.xdp	Miscellaneous Contract Addenda and Supplements	27 JUN 2017
<input type="checkbox"/>	Addendum to Vacant Land Contract	VLCA-1.xdp	Addendum/Amendment	20 AUG 2019
<input type="checkbox"/>	Auction Addendum	AA-1.xdp	Miscellaneous Contract Addenda and Supplements	01 DEC 2010

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.

Title	Form	Type	Last Updated
AS IS Residential Contract for Sale and Purchase	FloridaRealtors-FloridaBar-ASIS-5x.xdp	Florida Realtors Contract for Residential Sale and Purchase	14 JUN 2019
Addendum to Contract	ACSP-4.xdp	Miscellaneous Contract Addenda and Supplements	27 JUN 2017

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.

Title	Form	Type
Sellers Property Disclosure - Residential	SPDR-2.xdp	Real Property Disclosure Forms
Residential Lease for Apt. or Unit in Multi-Family Rental Housing other than a Duplex	RLAUCC-1x.xdp	Leases and Contracts to Lease
Residential Lease for Single Family Home and Duplex	RLHD-3x.xdp	Leases and Contracts to Lease
Residential Contract for Sale and Purchase	FloridaRealtors-FloridaBar-5.xdp	Florida Realtors Contract for Residential Sale and Purchase
CRSP15 Contract for Residential Sale and Purchase	CRSP15 Contract for Residential Sale and Purchase.xdp	Florida Realtors Contract for Residential Sale and Purchase
AS IS Residential Contract for Sale and Purchase	FloridaRealtors-FloridaBar-ASIS-5.xdp	Florida Realtors Contract for Residential Sale and Purchase

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.

The screenshot displays the 'Blank Forms' section of the Forms Library. At the top, there is a search bar labeled 'Search Forms' and a green 'Add to Transactions' button. Below the search bar, the forms are sorted by 'Title (A-Z)'. A green bar indicates the state is 'Florida'. The list of forms includes:

- ☐ Title
- ☐ AS IS Residential Contract for Sale
- ☐ Addendum to Contract
- ☐ Authorization to Furnish TILA-RESPA Integrated Disclosures ("TRID")
- ☐ Brokerage Relationship - No Brokerage Disclosure
- ☐ Brokerage Relationship - Single Agent

A red box highlights the magnifying glass icon next to the 'Authorization to Furnish TILA-RESPA Integrated Disclosures ("TRID")' form. A red arrow points from this icon to the preview window. The preview window shows the form titled 'Authorization to Furnish TILA-RESPA Integrated Disclosures ("TRID")' with the Florida Realtors logo. The form includes fields for:

- To: Lender, Title Company, Escrow Agent and/or their Representatives.
- Re: _____ (Property)
- I, _____ ☐ Seller ☐ Buyer am represented by the following Broker:
- Name of Broker: _____
- License Number: _____
- Address: _____
- City, State, Zip: _____
- Phone: _____
- Email: _____
- Name of Broker's Authorized Associate (if applicable): _____
- License Number of Authorized Associate (if applicable): _____

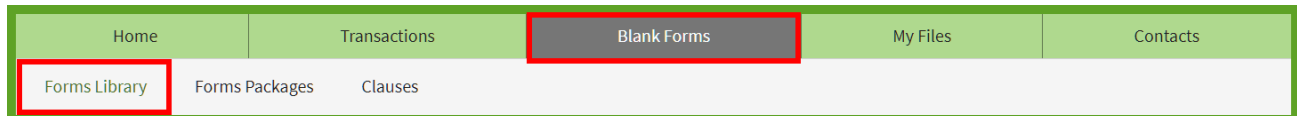
The form also includes a section for the user to authorize the disclosure of documents and a signature line with a date field. At the bottom, there is a note to licensees and the Form Simplicity logo.

Notes: _____

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.

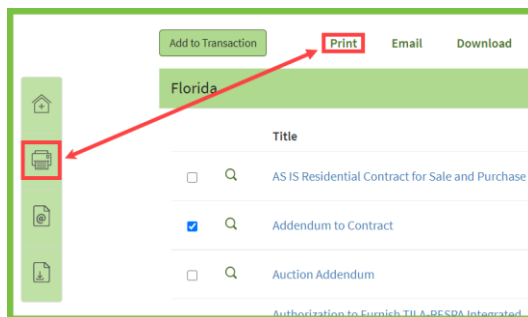
1. Start by clicking on “**Blank Forms**” from the navigation menu bar at the top of the Form Simplicity home page. This will automatically open the **Forms Library** section and take you to the **Blank Forms** library.



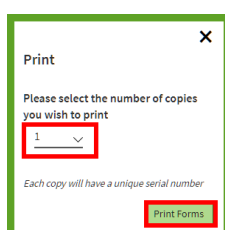
2. Your **Blank Forms** library will open. Select the form(s) you need by placing a check mark in the box to the left of the form's name.

<input type="checkbox"/>	Title	Form	Type	Last Updated
<input type="checkbox"/>	Sinkhole Disclosure	SD-1.xdp	Real Property Disclosure Forms	01 OCT 2005
<input type="checkbox"/>	2017 Honor Society Application	2017 Honor Society Application.xdp		
<input checked="" type="checkbox"/>	AS IS Residential Contract for Sale and Purchase	FloridaRealtors-FloridaBar-ASIS-5.xdp	Florida Realtors Contract for Residential Sale and Purchase	04 APR 2017
<input checked="" type="checkbox"/>	Addendum to Contract	ACSP-4.xdp	Miscellaneous Contract Addenda and Supplements	27 JUN 2017
<input type="checkbox"/>	Auction Addendum	AA-1.xdp	Miscellaneous Contract Addenda and Supplements	01 DEC 2010

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.*



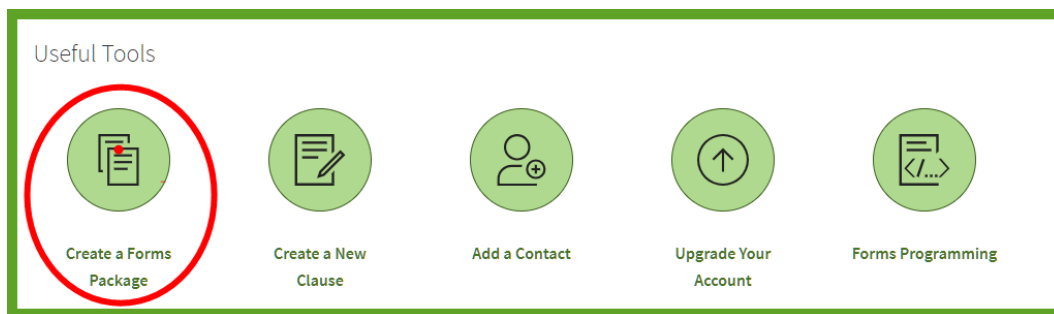
4. In the **Print** window, you have the option of selecting how many copies you wish to print. Then click the “**Print Forms**” button to confirm or click the “**X**” to cancel the action.



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.

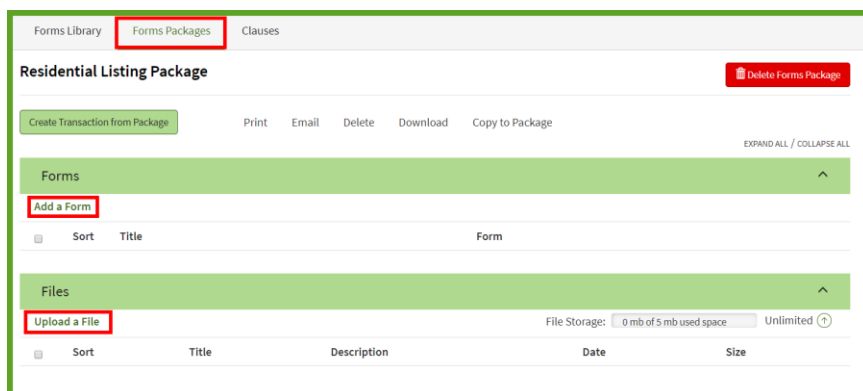
1. The quickest way to create a form package is to log in and click on the **“Create a Forms Package”** icon on the bottom of the Form Simplicity home page.



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

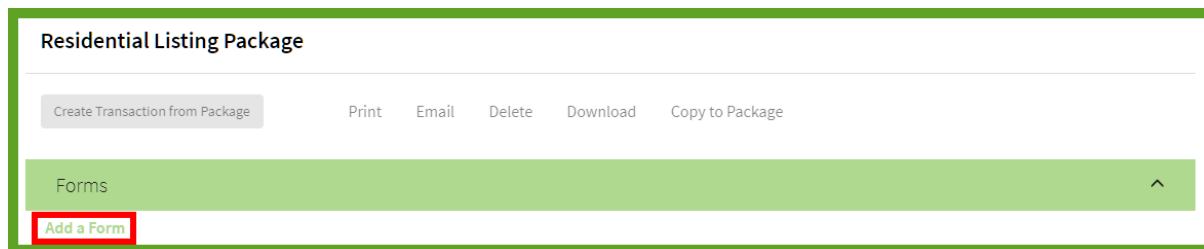
Note: At this point, your folder will be empty. Add forms to your package next.

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.



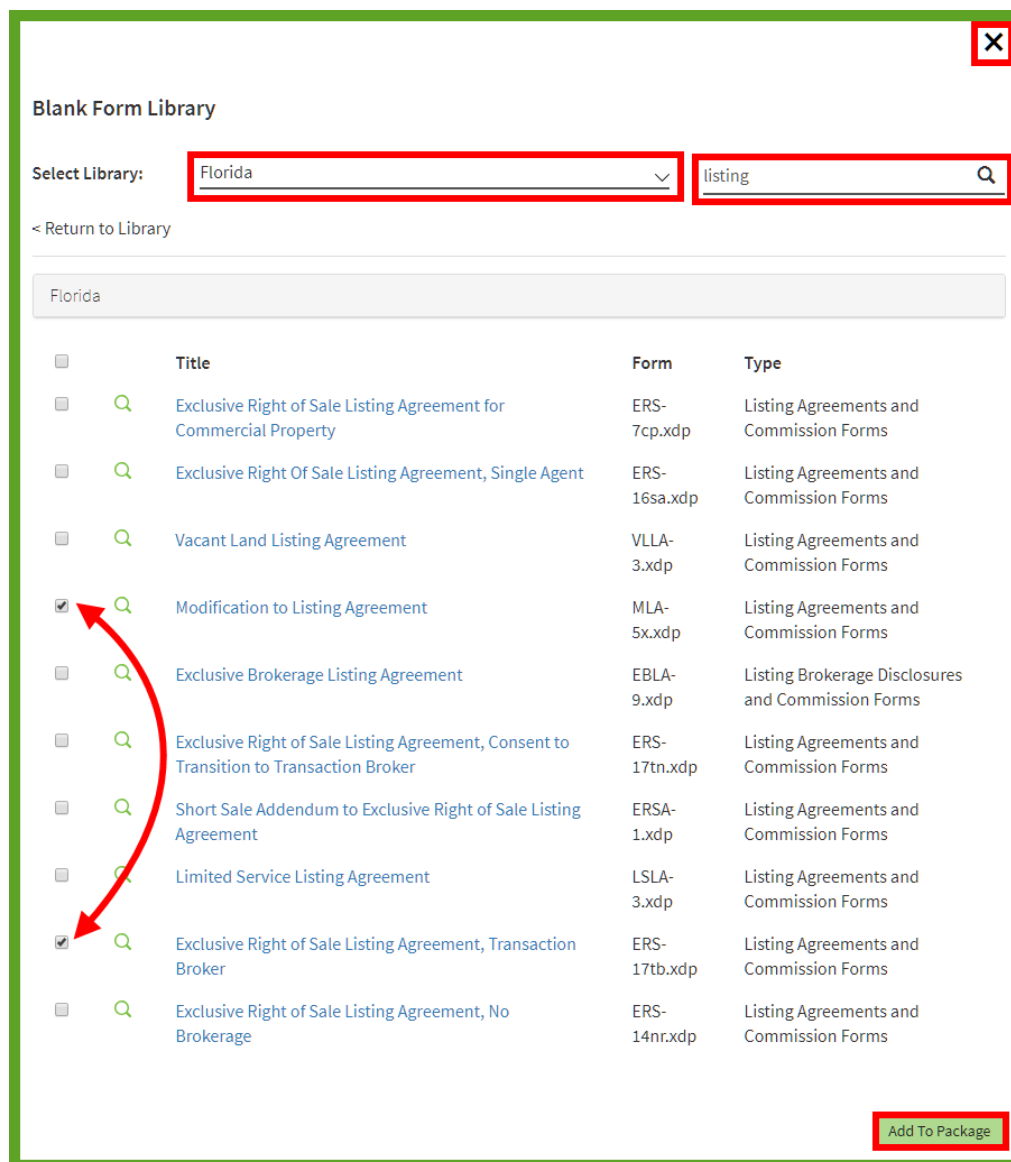
Residential Listing Package

Create Transaction from Package Print Email Delete Download Copy to Package

Forms

Add a Form

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.



Blank Form Library

Select Library: Florida listing

< Return to Library

Florida

<input type="checkbox"/>	Title	Form	Type
<input type="checkbox"/>	Exclusive Right of Sale Listing Agreement for Commercial Property	ERS-7cp.xdp	Listing Agreements and Commission Forms
<input type="checkbox"/>	Exclusive Right Of Sale Listing Agreement, Single Agent	ERS-16sa.xdp	Listing Agreements and Commission Forms
<input type="checkbox"/>	Vacant Land Listing Agreement	VLLA-3.xdp	Listing Agreements and Commission Forms
<input checked="" type="checkbox"/>	Modification to Listing Agreement	MLA-5x.xdp	Listing Agreements and Commission Forms
<input type="checkbox"/>	Exclusive Brokerage Listing Agreement	EBLA-9.xdp	Listing Brokerage Disclosures and Commission Forms
<input type="checkbox"/>	Exclusive Right of Sale Listing Agreement, Consent to Transition to Transaction Broker	ERS-17tn.xdp	Listing Agreements and Commission Forms
<input type="checkbox"/>	Short Sale Addendum to Exclusive Right of Sale Listing Agreement	ERSA-1.xdp	Listing Agreements and Commission Forms
<input type="checkbox"/>	Limited Service Listing Agreement	LSLA-3.xdp	Listing Agreements and Commission Forms
<input checked="" type="checkbox"/>	Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-17tb.xdp	Listing Agreements and Commission Forms
<input type="checkbox"/>	Exclusive Right of Sale Listing Agreement, No Brokerage	ERS-14nr.xdp	Listing Agreements and Commission Forms

Add To 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.”**

The screenshot shows the 'Residential Listing Package' interface. At the top, there are buttons: 'Create Transaction from Package', 'Print', 'Email', 'Delete', 'Download', and 'Copy to Package'. Below these is a green header for the 'Forms' section, which includes an 'Add a Form' link and a table with columns 'Sort', 'Title', and 'Form'. The table lists two forms: 'Exclusive Right of Sale Listing Agreement, Transaction Broker' (ERS-17tb.xdp) and 'Modification to Listing Agreement' (MLA-5x.xdp). Below the Forms section is a green header for the 'Files' section, which includes an 'Upload a File' button (highlighted with a red box), a 'File Storage' indicator showing '0 mb of 0 mb' and 'Unlimited' with an up arrow, and a table with columns 'Sort', 'Title', 'Description', 'Date', and 'Size'. A 'Delete Package' button with a red 'X' icon is at the bottom right.

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.

The screenshot shows the 'File Upload' window. It has a title bar with a close button (X). The main area is a dashed box with the text 'Drag 'n drop your files here.' and a note: 'Accepted file types and size will depend on your edition of Form Simplicity.' Below this, a file is being added: 'New Listing Checklist.pdf' with a description 'Used for Residential Listing Transactions'. A red box highlights the file name and description. Below the dashed box is a green button labeled 'Click here to browse for files' (highlighted with a red box). At the bottom, there are two buttons: 'Clear Files' and 'Save Files' (both highlighted with red boxes).

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

The screenshot shows the 'Residential Listing Package' interface. At the top, there are buttons for 'Create Transaction from Package', 'Print', 'Email', 'Delete', 'Download', and 'Copy to Package'. Below these are two main sections: 'Forms' and 'Files'. The 'Forms' section has a table with columns 'Sort', 'Title', and 'Form', listing 'Exclusive Right of Sale Listing Agreement, Transaction Broker' and 'Modification to Listing Agreement'. The 'Files' section has a table with columns 'Sort', 'Title', 'Description', 'Date', and 'Size'. A file named 'New Listing Checklist.pdf' is highlighted with a red box. The file's description is 'Used for Residential Listing Transactions', its date is '02.25.19', and its size is '.12 mb'. A 'Delete Package' link is visible at the bottom right.

Sort	Title	Description	Date	Size
	Options	New Listing Checklist.pdf	02.25.19	.12 mb

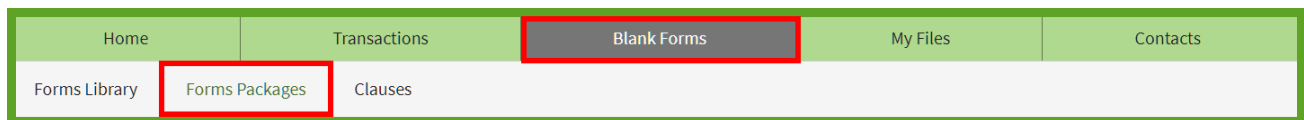
Note: Files that are uploaded are static: not editable and will not auto-populate data.

Notes: _____

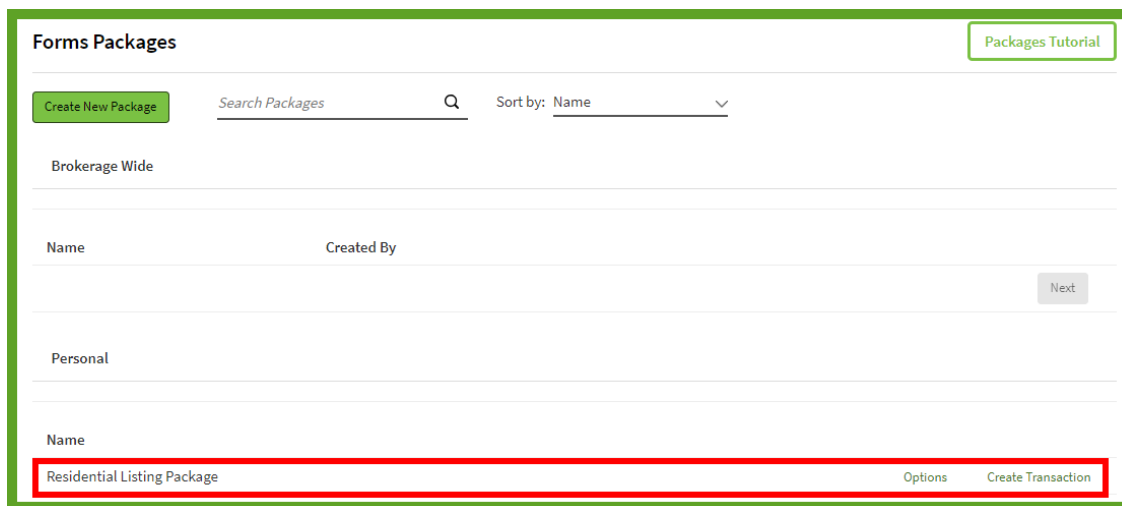
Forms Packages: Copy to Package

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

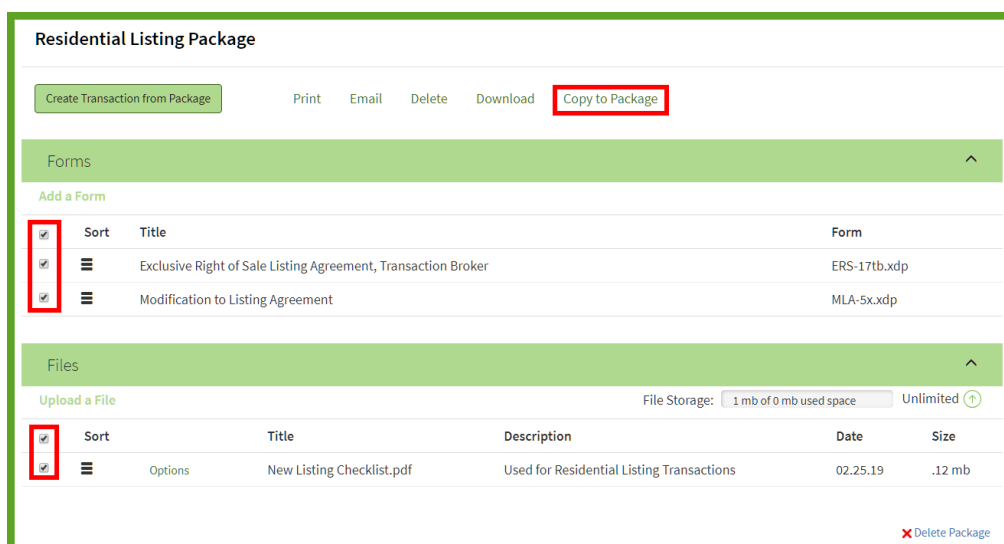
1. Log in and click on **“Blank Forms”** from the main navigation menu at the top of the page. Then select **“Forms Packages”** from the **Blank Forms** secondary navigation menu.



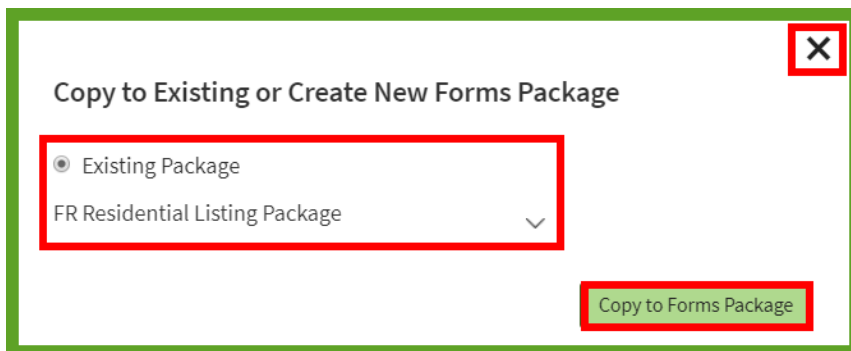
2. Click on the package name to open the package that contains the Forms and Files you wish to copy.



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:
- 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.



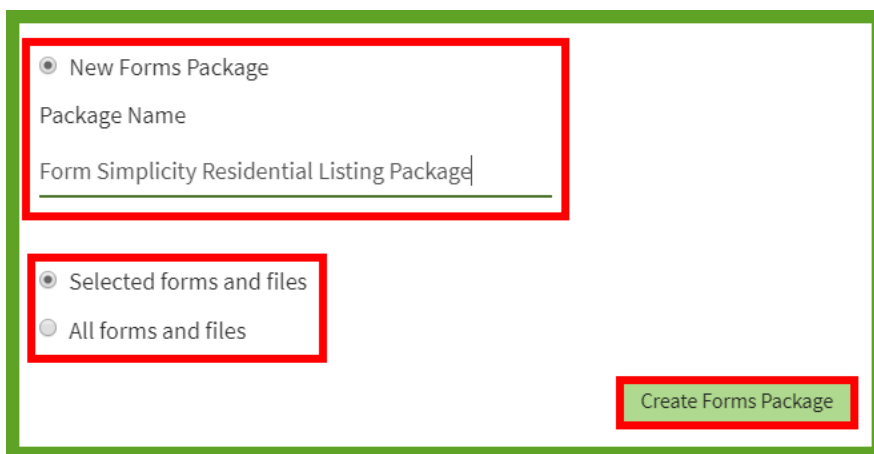
Copy to Existing or Create New Forms Package

☒ Existing Package

FR Residential Listing Package

Copy to Forms Package

- 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.



☒ New Forms Package

Package Name

Form Simplicity Residential Listing Package

☒ Selected forms and files

☐ All forms and files

Create Forms Package

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:

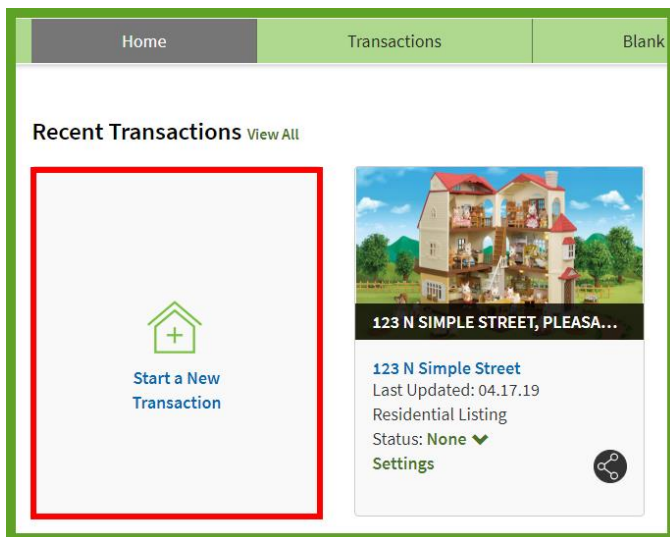
*Global data contained within the forms being copied over will only be saved into the destination package (the existing package where the forms are being copied **into**) if there is no current information in that field of the destination package, e.g. Brokerage name.*

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.



Notes: _____

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.

New Transaction

Street Address: 123 SIMPLE ST, PLEASANTVILLE FL 32933

Transaction Name: 123 SIMPLE ST, PLEASANTVILLE FL 32933 ☒ Same as address

Property Type: Residential

Transaction Type: Listing

Use Forms Package

Name	Usage	Created By
<input type="radio"/> Residential Listing Package	Brokerage	Kaz Cisowski, Trainer
<input checked="" type="radio"/> Residential Listing Package	Personal	User 2, Student
<input type="radio"/> Residential Sales Package	Brokerage	Kaz Cisowski, Trainer
<input type="radio"/> Sales Package	Brokerage	Kaz Cisowski, Trainer
<input type="radio"/> Short Sales Package	Personal	User 2, Student

Previous 1 2 3 4 Next

Create Transaction

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."**

Transaction Email: fs+123nsimplest_5565197@formsimplicity.com

Archive Transaction
Delete Transaction

Full Address
123 N Simple St, Pleasantville FL 32757

Property Type
Residential

Transaction Type
Listing

Transaction Status
New

MLS Listing ID
Enter MLS ID

Listing Price
\$ 0

Purchase Price
\$ 0

Show More Data
Import Property Data
Save Data

123 N Simple St, Pleasantville FL 32757

EXPAND ALL / COLLAPSE ALL

Broker Review

Add Review Checklist

Forms and Files

eSign
Print
Email
Fax
Merge
Delete
Copy to Transaction
Download

Forms

Add Blank Forms
Add Forms Package

Files

Upload File
Fax Back Cover Page

File Storage: 1 mb of 80 mb used space Unlimited

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.*

File Upload

Drag 'n drop your files here.

Accepted file types and size will depend on your edition of Form Simplicity.

Marketing Flyer.pdf

Add a file description

-or-

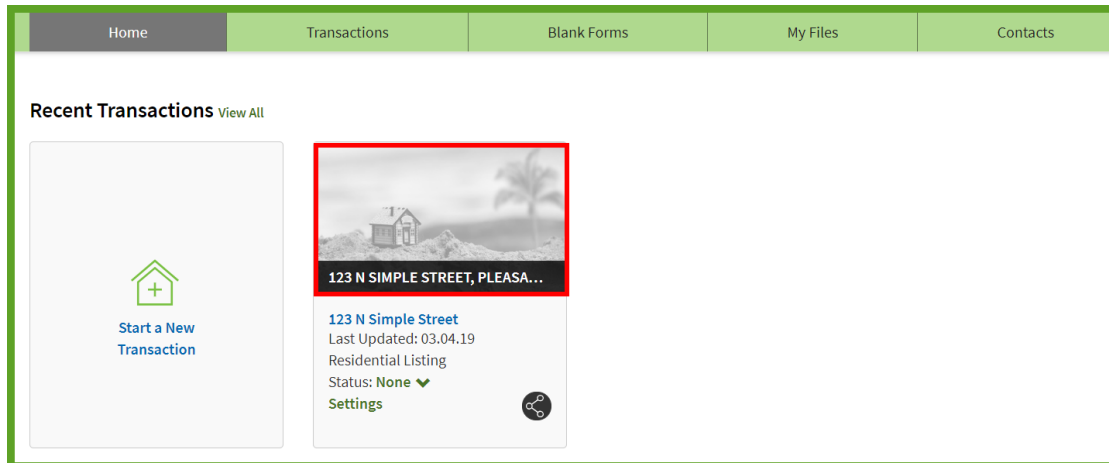
Click here to browse for files

Clear Files Save Files

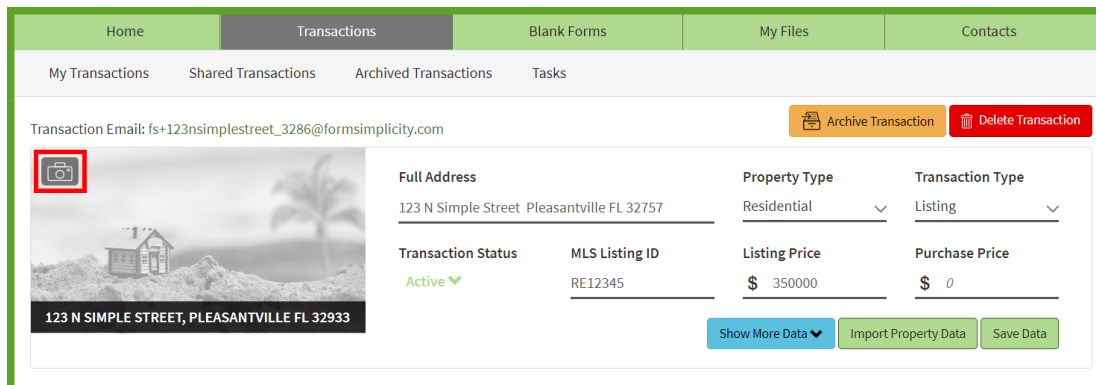
Notes: _____

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.

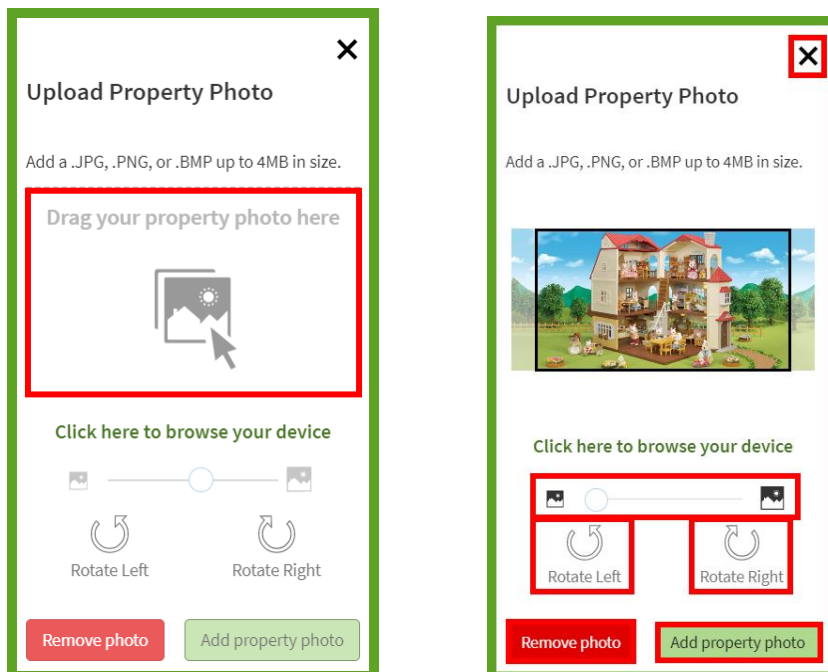


2. Click on the camera button in the left corner of the generic photo to update the property photo.

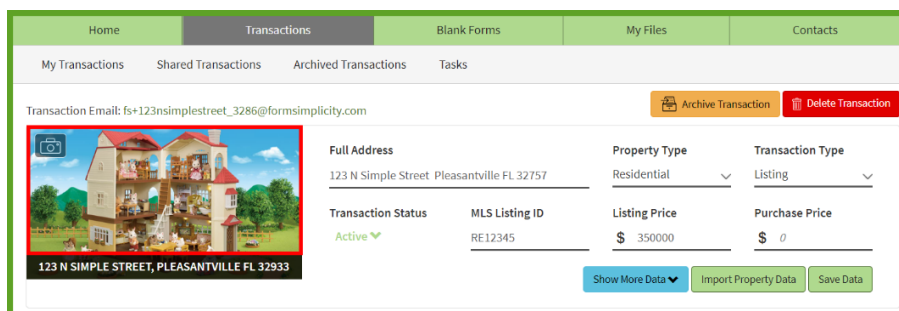


Notes: _____

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.



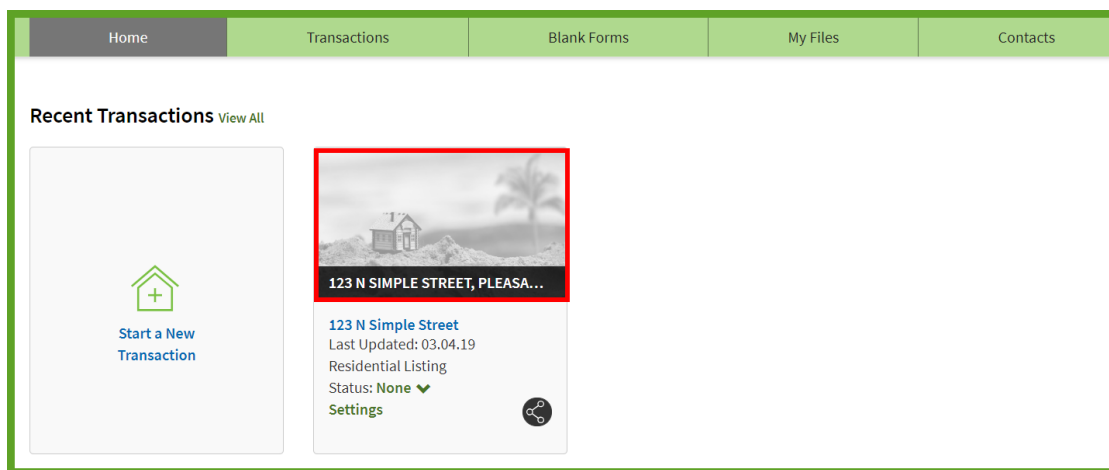
4. Once you click on the **“Add property photo”** button, you will receive the Form Simplicity confirmation message ***Your property photo has been saved.***
5. The property photo appears in the transaction record.



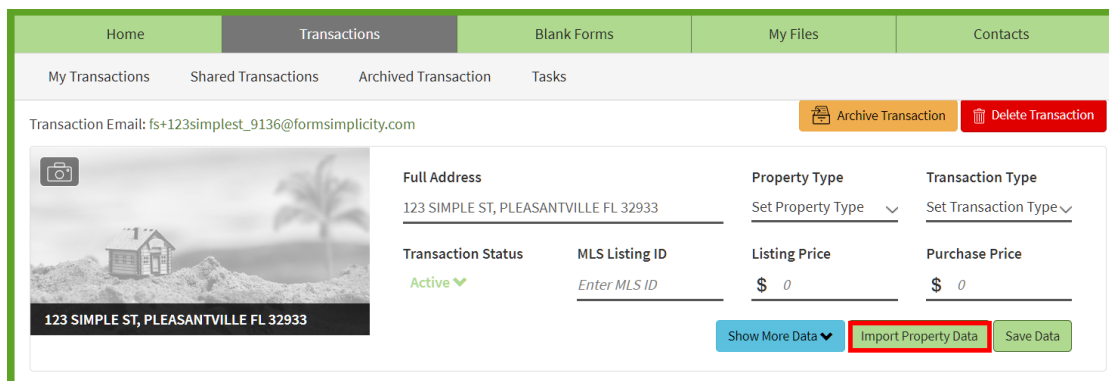
Transactions: Import Property Data – MLS Information

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.

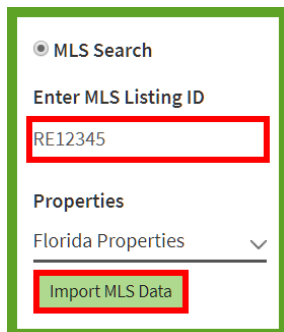
1. Log in and either from the home screen or from **“My Transactions”** from the **“Transactions”** main navigation menu, click on the transaction you wish to import MLS data.



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@yourparadiseshome.com

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

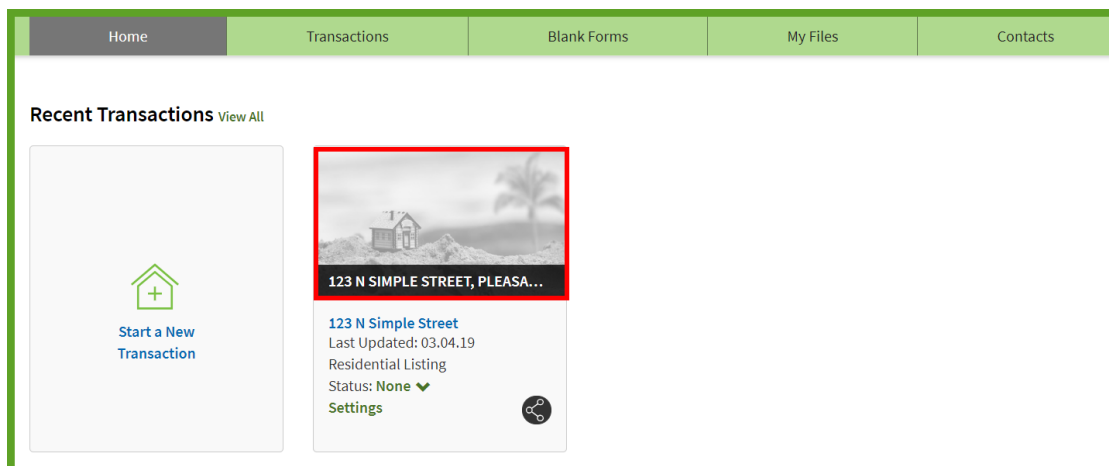
Save information to transaction

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.

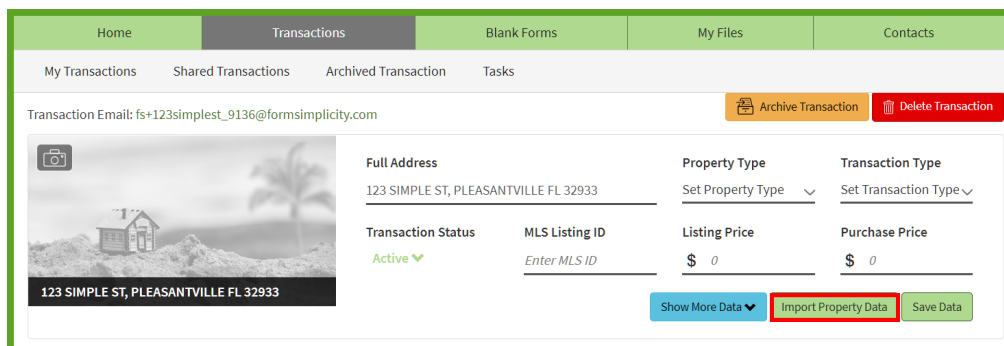
Transactions: Import Property Data – Tax Information

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.

House #

123

Street Name

SIMPLE

Type

Direction

Unit

City

State

Florida

Zip

County *(Required)

Orange

Parcel ID

Find Tax Data

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, PLEASANTVILLE, 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.

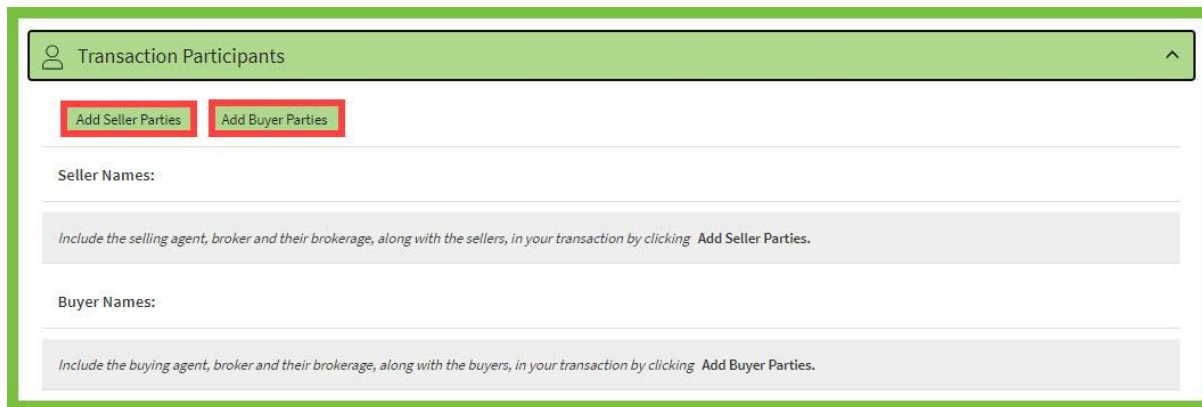
Transactions: Transaction Participants

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.

Name	Home Email	Work Email	Home Fax	Work Fax
Holly Hill		kaz@yourparadiseshome.com		
Lisa Karr		kaz@yourparadiseshome.com		
Rusty Karr	kaz@yourparadiseshome.com	kazc@floridarealtors.org		

Name	Transaction Party	Action
Rusty Karr	Seller/Landlord Party 1 ▼	Remove
Lisa Karr	Seller/Landlord Party 2 ▼	Remove
KAZ CISOWSKI	Seller/Landlord Broker ▼	Remove
KAZ CISOWSKI	Seller/Landlord Agent ▼	Remove

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

Transaction Party

Seller/Landlord Party 1 ✓

Seller/Landlord Party 2 ✓

Seller/Landlord Broker ✓

Seller/Landlord Agent ✓

Seller/Landlord Agent ✓

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.

Step 2: Use the drop-down menus to assign the selected contacts to their appropriate transaction roles.

Name	Transaction Party	Action
Rusty Karr	Seller/Landlord Party 1 ✓	Remove
Lisa Karr	Seller/Landlord Party 2 ✓	Remove
KAZ CISOWSKI	Seller/Landlord Broker ✓	Remove
KAZ CISOWSKI	Seller/Landlord Agent ✓	Remove

Add Contacts

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.

Seller/Landlord Information Add from Contacts X

Seller/Landlord Names
Enter the names of the sellers or landlords

Seller/Landlord Party 1 ^

Party 1 Name
Rusty Karr

Party 1 Full Address
^

Party 1 ID
xxx-xx-0000

Party 1 Email
kaz@yourparadisehome.com

Party 1 Home
(305) 345-435

Party 1 Work
000-000-0000

Party 1 Cell
000-000-0000

Party 1 Fax
000-000-0000

Seller/Landlord Party 2 v

Seller/Landlord Brokerage v

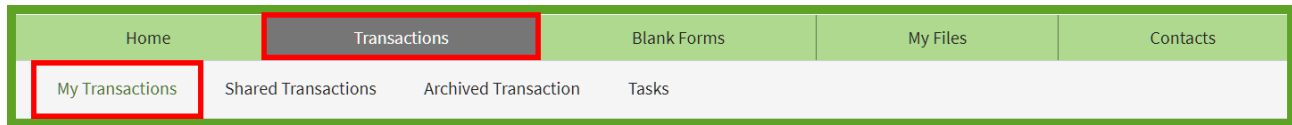
Seller/Landlord Broker ^

Seller/Landlord Agent v

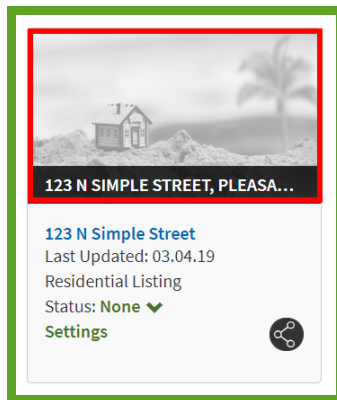
Save Seller Information

Transactions: Broker Review

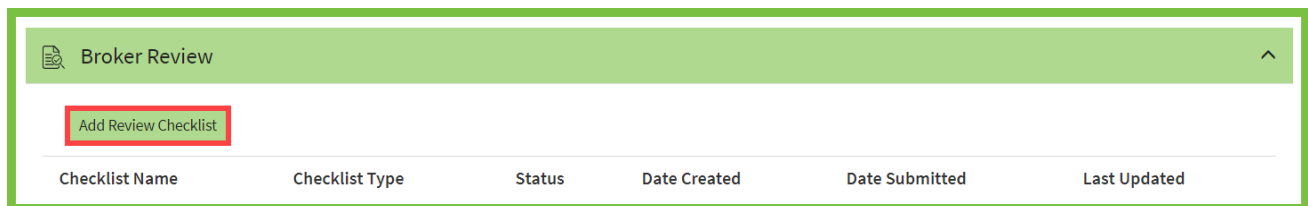
1. Log in and click on **“Transactions”** on the main navigation menu at the top of the Form Simplicity home page. This will automatically open the **“My Transactions”** screen.



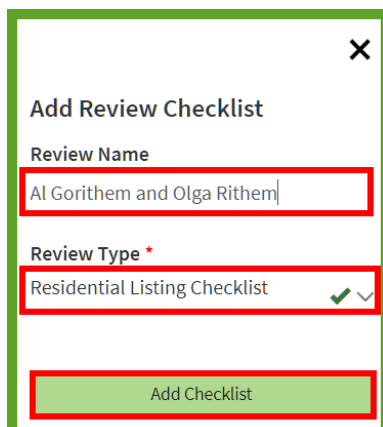
2. Click on the transaction folder to open.



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.

Broker Review

Name	Type	Status	Date Created	Date Submitted	Last Updated
Al Gorithem and Olga Rithem	Residential Listing Checklist	Unsubmitted	25-FEB-19		25-FEB-19

Document Checklist

Send Email

Name	Status	File
Listing Agreement - Transaction Broker	Required	Click to add file
Seller Disclosure	Required	Click to add file
Lead Paint Paint	If Applicable	Click to add file

[Add Additional Checklist Documents](#) [Submit](#) [Delete](#)

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.

Add Additional File

This document is included with the file I added to the following checklist item

Select checklist item

☒ New Listing Checklist.pdf
New Listing Checklist 02.25.19

[Click here to upload a file from your device](#)

Checklist document name * ☒ same as file name

Notes

[Add File](#)

7. After the files have been attached to the items in the **Document Checklist** section, those items will show an **“Added”** status.
- Each item will contain a list of options:
 - The **“magnifying glass”** opens the **File Preview** window allowing you to review a file.
 - The **“comment bubble”** opens the **Checklist Item Notes** window allowing you to write a note to your broker.
 - 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.*

Name	Status	View All	File	File
Listing Agreement - Transaction Broker	Added			
Seller Property Disclosure Form	Added			
Lead Based Paint Disclosure	If Applicable		Click to add file	
HOA Disclosure	If Applicable		Click to add file	
New Listing Checklist	Added			

Add Additional Checklist Documents

Submit Delete

Notes: _____

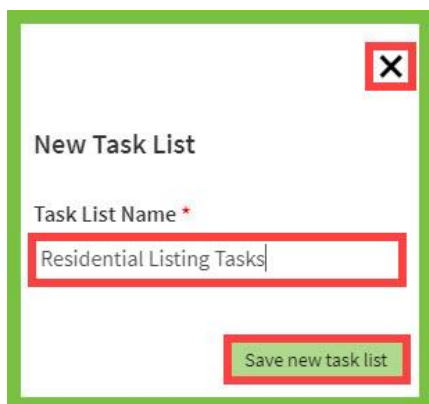
Tasks: Create New Task List

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.



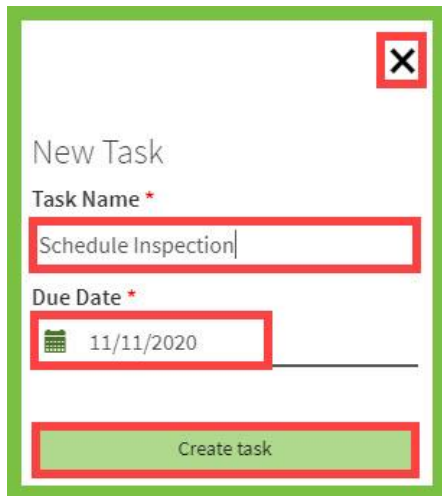
2. In the **New Task List** screen, enter the **“Task List Name”** and click on the **“Save new task list”** button. If you wish to cancel the action, click on the **“X”**. You will get the Form Simplicity confirmation message *(The New Task List Name) task list is added to the Tasks section.*



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.

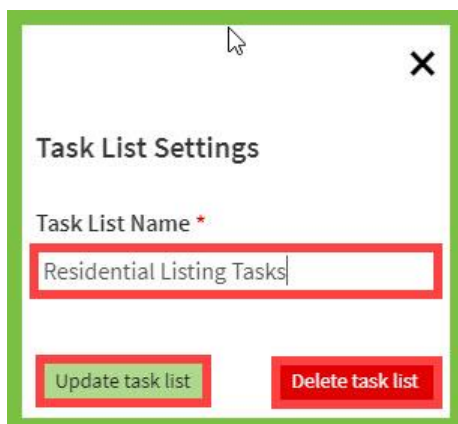


5. On the day, the task is due, you will receive an email reminding you of the task if you set up the task notification in the **Email Notifications** section of **My Preferences**.

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

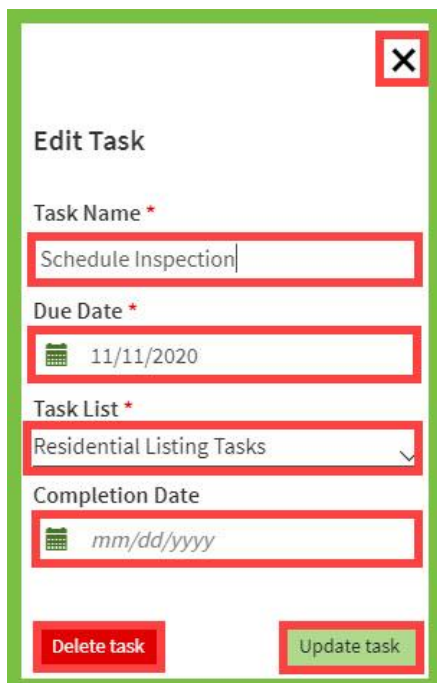
Tasks can be changed which includes changing the due date on the task or changing the name of the task.

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



The screenshot shows the 'Tasks' section of the software. At the top, there is a green header bar with a clipboard icon and the word 'Tasks'. Below this, there are two buttons: 'Create New Task List' and 'Load Task List Template'. To the right, there is a 'Sort by:' dropdown menu set to 'Due Date (Ascending)'. Below these, there is a search bar containing 'Residential Listing Tasks | 1'. To the right of the search bar are four icons: an up arrow, a down arrow, a gear, and a refresh icon. Below the search bar, there is a table with two columns: 'Task Name' and 'Due Date'. The table contains one row with a radio button, the text 'Schedule Inspection', and the text 'Tomorrow'. At the bottom left, there is a '+ Add New Task' 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.



The screenshot shows the 'Edit Task' window. It has a green border and a red 'X' button in the top right corner. The window contains the following fields and buttons:

- Task Name ***: A text input field containing 'Schedule Inspection'.
- Due Date ***: A date picker field showing '11/11/2020'.
- Task List ***: A dropdown menu showing 'Residential Listing Tasks'.
- Completion Date**: A date picker field showing 'mm/dd/yyyy'.
- Delete task**: A red button.
- Update task**: A green button.

Tasks: Delete Task

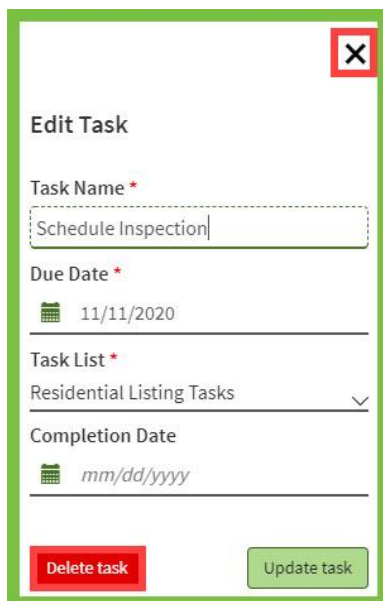
You may discover that you no longer need to complete a task that is part of a transaction.

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



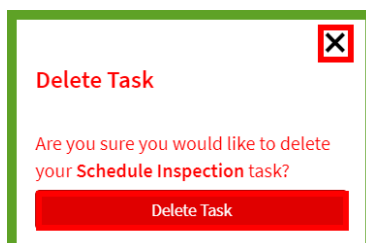
The screenshot shows the 'Tasks' section of the software. At the top, there are buttons for 'Create New Task List' and 'Load Task List Template'. Below these is a search bar containing 'Residential Listing Tasks | 1'. To the right of the search bar is a 'Sort by: Due Date (Ascending)' dropdown menu. Below the search bar is a table with two columns: 'Task Name' and 'Due Date'. The table contains one row with the task 'Schedule Inspection' and the due date 'Tomorrow'. A red box highlights the 'Schedule Inspection' task. At the bottom left of the table is a '+ Add New Task' button.

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



The screenshot shows the 'Edit Task' screen. At the top right is a red 'X' button. Below it is the title 'Edit Task'. The form has four fields: 'Task Name' with the value 'Schedule Inspection', 'Due Date' with the value '11/11/2020', 'Task List' with the value 'Residential Listing Tasks', and 'Completion Date' with the value 'mm/dd/yyyy'. At the bottom are two buttons: 'Delete task' (red) and 'Update task' (green).

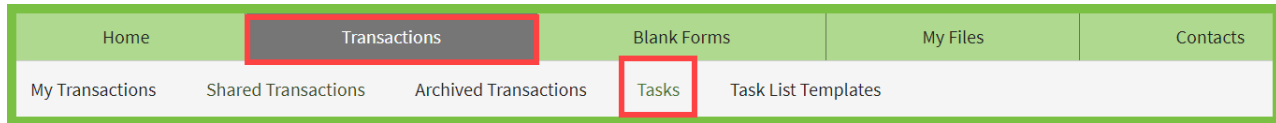
3. A **Delete Task** box will pop up requesting confirmation. Click the “Delete Task” button to delete or click on “X” to cancel the action.



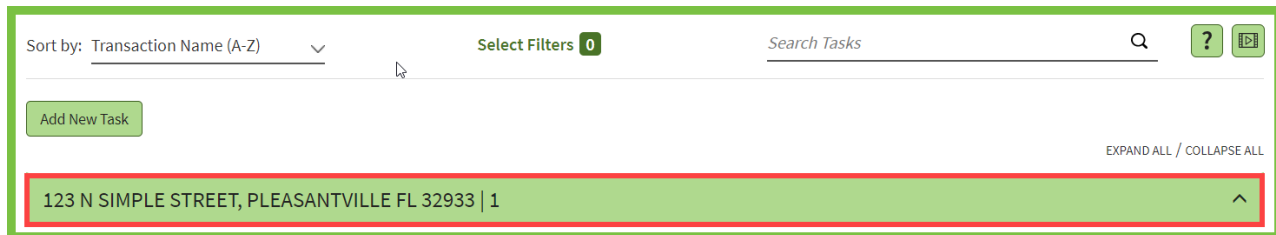
The screenshot shows a 'Delete Task' confirmation box. At the top right is a red 'X' button. Below it is the title 'Delete Task'. The text inside the box asks: 'Are you sure you would like to delete your Schedule Inspection task?'. At the bottom is a red button labeled 'Delete Task'.

Tasks: Accessing Transaction Tasks

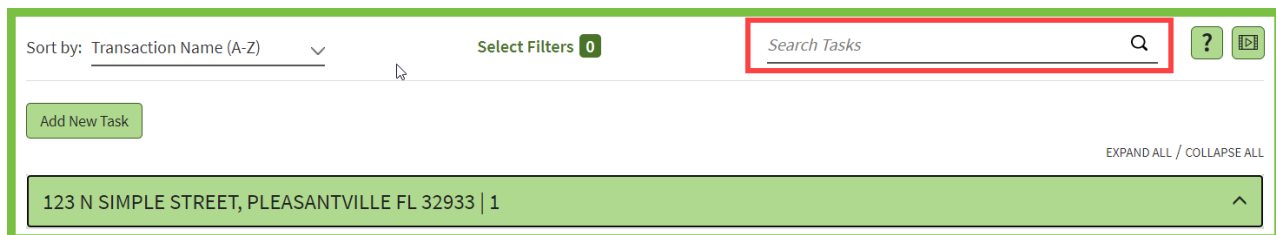
1. Log in and click on **“Transactions”** on the main navigation menu at the top of the Form Simplicity home page. Then select **“Tasks”** from the secondary navigation menu.



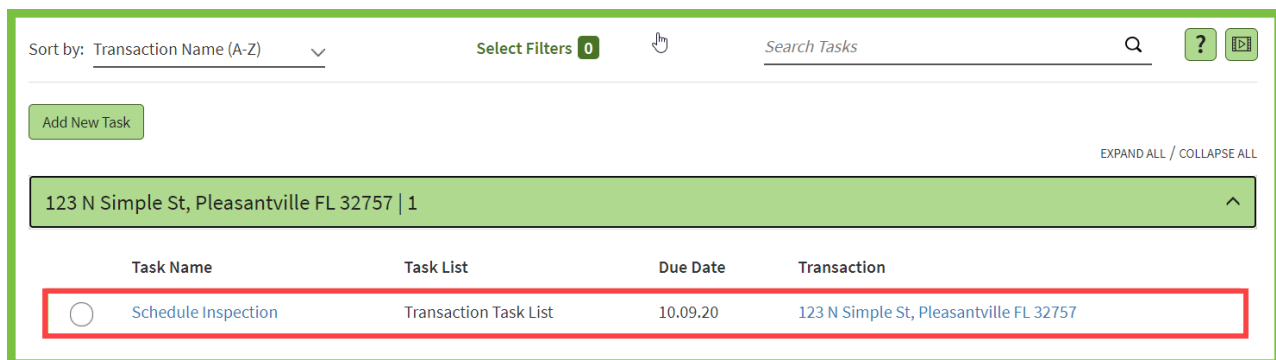
2. All the tasks for all your transactions will be listed.



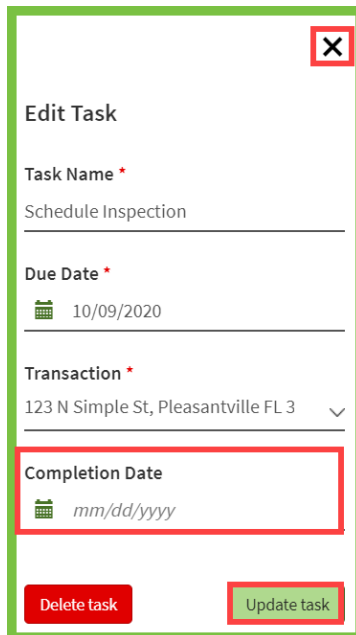
3. You may use the **Search Tasks** search bar clicking on the magnifying glass to locate the task you need.



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”**.



Edit Task

Task Name *
Schedule Inspection

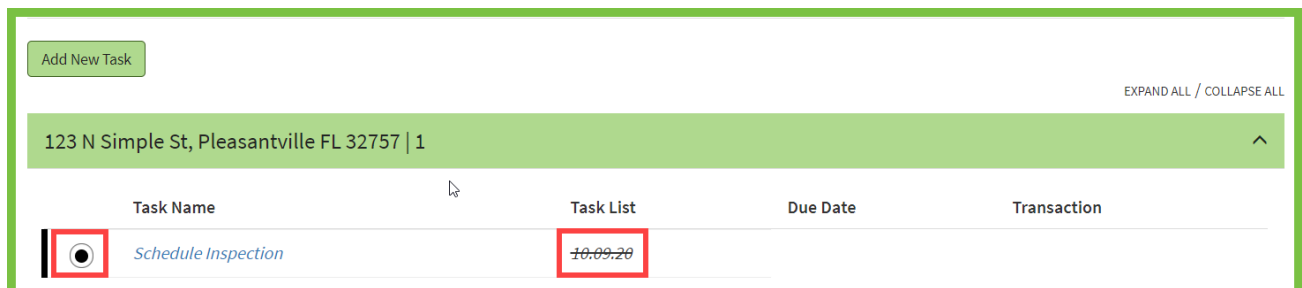
Due Date *
10/09/2020

Transaction *
123 N Simple St, Pleasantville FL 3

Completion Date
mm/dd/yyyy

Delete task 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.



Add New Task

EXPAND ALL / COLLAPSE ALL

123 N Simple St, Pleasantville FL 32757 | 1

Task Name	Task List	Due Date	Transaction
<input type="radio"/> Schedule Inspection	10-09-20		

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**.

Tasks

Add Task Load Task List Template

Sort by: Due Date (Ascending) ▾

Task Name	Due Date
-----------	----------

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.

Load Task List Templates

Brokerage Templates Personal Templates

EXPAND ALL / COLLAPSE ALL

☒ Residential Listing Tasks

Task Name	Task Due Date
Have Seller Sign Listing Agreement	10/16/2020
Place Real Estate Sign on Property	10/19/2020
Take MLS Pictures	10/17/2020
Schedule Home Inspection	10/19/2020

☐ Listing Task

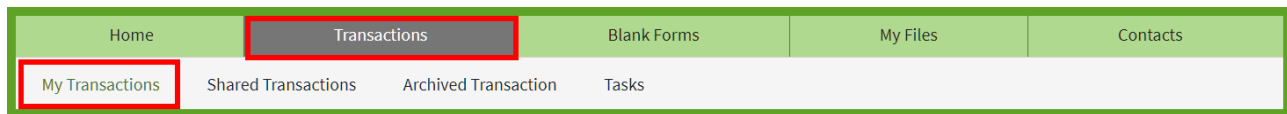
Save Task List Template to Transaction

Transactions: Collaboration

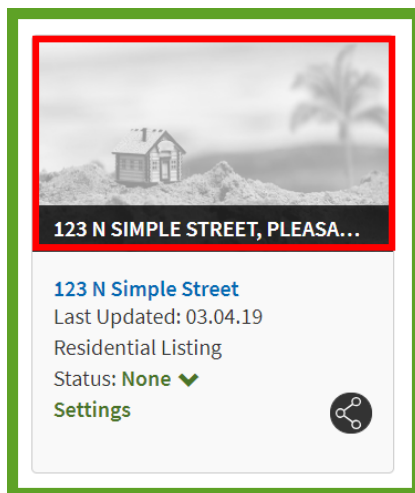
Collaboration is a paperless feature which allows outside parties and clients to add negotiation comments to forms and files that the agent has shared with them since those outside parties and clients are unable to edit any transaction details. It is the easiest way to track negotiation comments from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

The screenshot shows a 'Collaboration' window with a close button (X) in the top right corner. It contains three main input sections, each highlighted with a red border:

- Email Address ***: A text input field containing 'fltechtrainer@gmail.com' with a small 'x' icon to clear it. Below the field is a placeholder text 'Enter an email address and press Enter'. A small green person icon is visible to the right of the input field.
- Subject ***: A text input field containing 'Please Review' with a green checkmark icon to its right.
- Message**: A large text area containing the text 'Please review the listing agreement.' followed by a green checkmark icon. Below this, there is additional text: 'Justin Case, REALTOR®', 'Simplicity Real Estate', and '(407) 123-4567'.

At the bottom right of the window is a green button labeled 'Send Collaboration link'.

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.

Name	Email	Documents	Comments	Invitation	Shared Link
Lee Vista	kaz@yourparadiseshome.com	Manage	View	Resend	Enabled <input type="checkbox"/>

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.

Collaboration Documents:

Forms ^

<input type="checkbox"/>	Title	Form	Date
<input checked="" type="checkbox"/>	Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-17tb.xdp	03.04.19
<input checked="" type="checkbox"/>	Sellers Property Disclosure - Residential	SPDR-2.xdp	03.04.19
<input checked="" type="checkbox"/>	CR-5_P. Lead Based Paint Disclosure	CR-5_P.xdp	03.04.19
<input type="checkbox"/>	CR-5_B. Homeowners Association_HOA - Community Disclosure	CR-5_B.xdp	03.04.19
<input type="checkbox"/>	Modification to Listing Agreement	MLA-5x.xdp	03.04.19
<input type="checkbox"/>	Transaction Record	TR-1.xdp	03.04.19

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

Collaboration ^

Collaborate **View all Comments**

Name	Email	Documents	Comments	Invitation	Shared Link
Anne Chovey	fltechtrainer@gmail.com	Manage	View	Resend	Enabled <input type="checkbox"/>
Amelia Rivers	fltechtrainer@gmail.com	Manage	View	Resend	Enabled <input type="checkbox"/>

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.

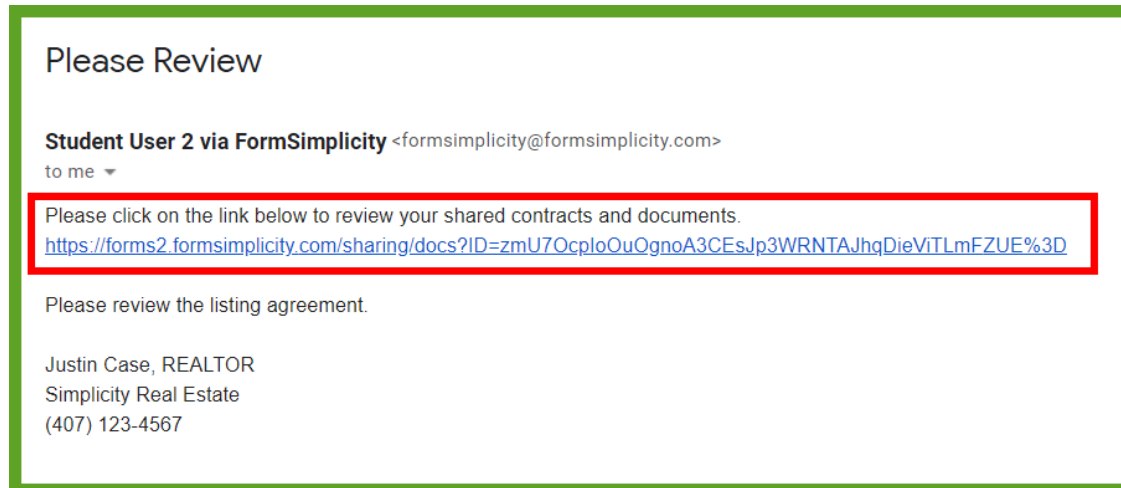
All Comments X

Exclusive Right of Sale Listing Agreement, Transaction Broker ^

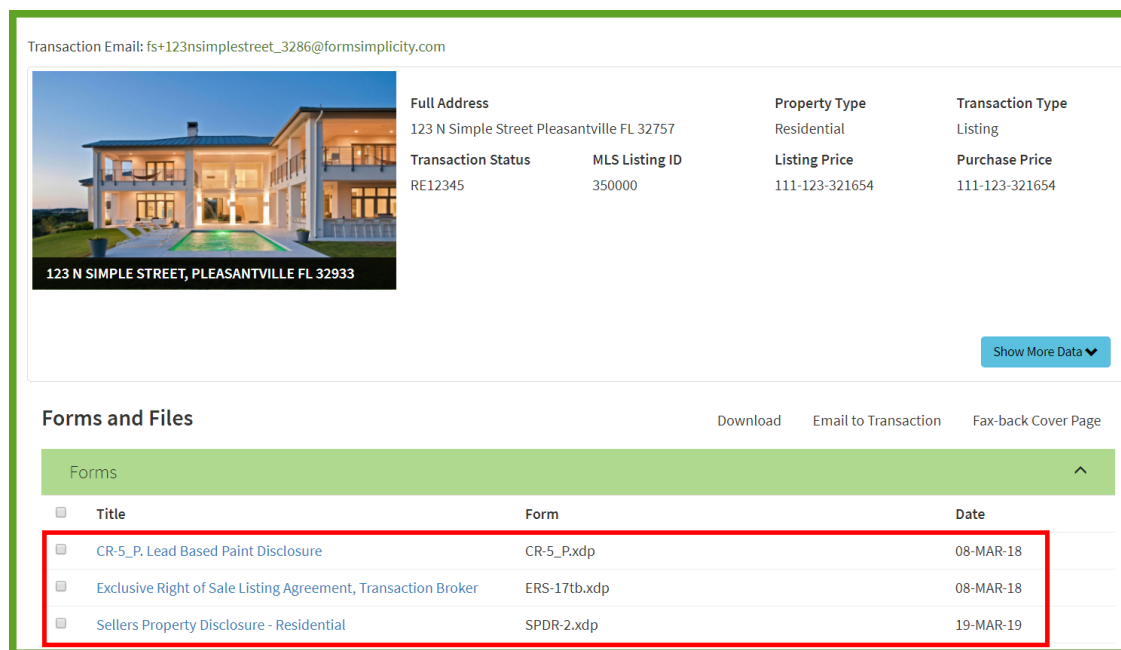
Date/Time	Name	Notes
04.16.19 02:05 PM	Student User 2	Comments added here are visible to all parties in real time.

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.*

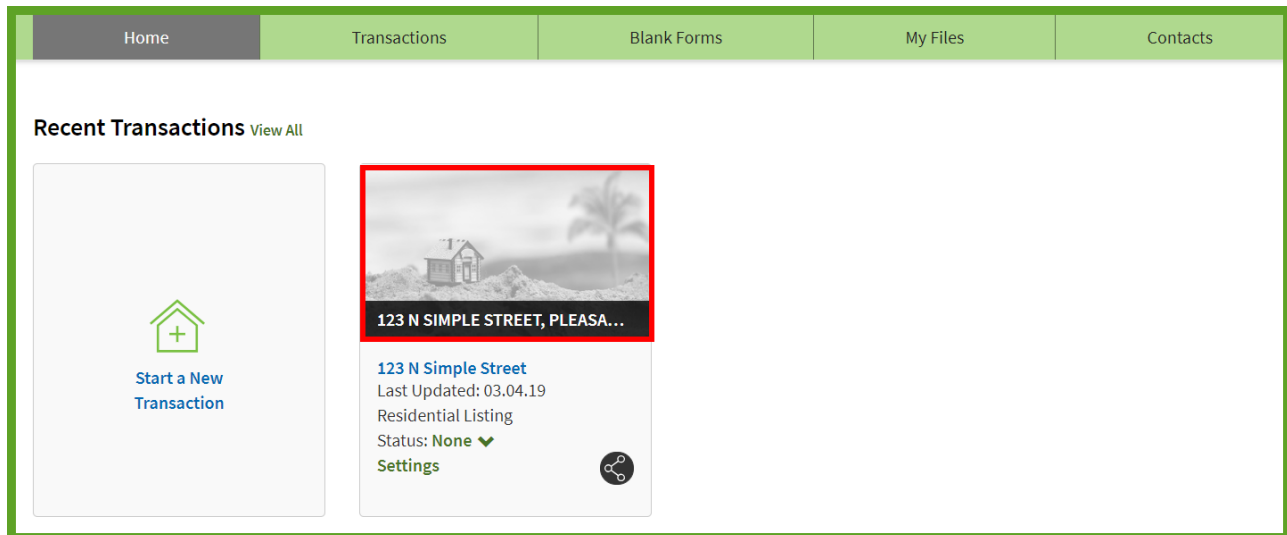
The screenshot shows a digital form titled "Exclusive Right of Sale Listing Agreement" with the Form Simplicity logo. The form contains fields for "Seller" (Sam and Sally, a married couple) and "Broker". It includes sections for "Authority to Sell Property" and "Description of Property" (123 N Simple Street, Pleasantville FL 32757). On the right, a "Comments (1)" sidebar is visible, containing a comment box with a "Post Comment" button. A red box highlights the comment text: "Each party who receives the link has the ability to add their comments." Another red box highlights the comment details: "Comments added here are visible to all parties in real time." and "kaz@yourparadisehome.com - 04.16.19 | 02:05 PM".

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.

History			
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: _____

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.

Forms and Files

eSign **Print** Email Fax Delete Copy to Transaction Download

Forms

Add Form

<input type="checkbox"/>	Sort	Title	Form	Date	
<input checked="" type="checkbox"/>	≡	Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-17tb.xdp	02.25.19	Save As File
<input checked="" type="checkbox"/>	≡	Sellers Property Disclosure - Residential	SPDR-2.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_P, Lead Based Paint Disclosure	CR-5_P.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_B, Homeowners Association_HOA - Community Disclosure	CR-5_B.xdp	02.25.19	Save As File

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

Print

Please select the number of copies you wish to print

1

Each copy will have a unique serial number

Print

Notes: _____

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.

Forms and Files eSign Print **Email** Fax Delete Copy to Transaction Download

Forms

Add Form

<input type="checkbox"/>	Sort	Title	Form	Date	
<input checked="" type="checkbox"/>	≡	Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-17tb.xdp	02.25.19	Save As File
<input checked="" type="checkbox"/>	≡	Sellers Property Disclosure - Residential	SPDR-2.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_P. Lead Based Paint Disclosure	CR-5_P.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_B. Homeowners Association_HOA - Community Disclosure	CR-5_B.xdp	02.25.19	Save As File

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

Email

To *

fitechtrainer@gmail.com x

Subject *

Listing Package ✓

Message

Please find included the forms for you to review. ✓

Sincerely,

Justin Case, REALTOR
Simplicity Realty
(407) 123-4567

☐ Send me a copy
☒ Disable editing



Send Email

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.


Transaction Email **fs+123simplest_9136@formsimplicity.com**

 
123 SIMPLE ST, PLEASANTVILLE FL 32933

Full Address
123 SIMPLE ST, PLEASANTVILLE FL 32933

Transaction Status	MLS Listing ID
Active ✓	Enter MLS ID

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.

 **Send**


From ▼ fitechtrainer@gmail.com

To... fs+206manthavecocoaf1.8175@formsimplicity.com

Cc...

Bcc...

Subject Additional Items

Attached  New Listing Checklist.pdf
121 KB

Attached is another item you need to review.

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.

The screenshot shows the 'Files' section of a transaction interface. At the top, there's a green header with 'Files' and an expand/collapse arrow. Below it, there are links for 'Upload File' and 'Fax Back Cover Page', and a file storage status: 'File Storage: 1 mb of 0 mb used space Unlimited' with an upward arrow icon. A table lists files with columns: Sort, Title, Description, Date, and Size. The first file, 'New Listing Checklist.pdf', is highlighted with a red box. Below the table, there's a sidebar with icons and labels for 'Transaction Participants', 'Tasks', 'eSign', 'Collaboration', 'Email' (highlighted with a red box), and 'History'.

Sort	Title	Description	Date	Size
Options	New Listing Checklist.pdf	New Listing Checklist	02.25.19 / 07:28 PM	.12 mb

*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.*

The screenshot shows a 'File Options' dialog box with a close button (X) in the top right corner. It contains sections for 'Replace File' and 'Update File'. Under 'Update File', there are input fields for 'File Name' (containing 'New Listing Checklist.pdf') and 'File Description' (containing 'New Listing Checklist'). A 'Save Changes' button is at the bottom right.

File Options

Replace File

Browse

Click browse to select a file

Update File

File Name

New Listing Checklist.pdf

File Description

New Listing Checklist

Save Changes

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.

The screenshot shows the 'Forms and Files' section of the software. At the top, there are buttons for 'eSign', 'Print', 'Email', 'Fax' (highlighted with a red box), 'Delete', 'Copy to Transaction', and 'Download'. Below these is a green header bar with a document icon and the word 'Forms'. Underneath is a section titled 'Add Form' followed by a table of forms. The first two rows have checkboxes checked (highlighted with red boxes).

	Sort	Title	Form	Date	
<input checked="" type="checkbox"/>	≡	Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-17tb.xdp	02.25.19	Save As File
<input checked="" type="checkbox"/>	≡	Sellers Property Disclosure - Residential	SPDR-2.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_P. Lead Based Paint Disclosure	CR-5_P.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_B. Homeowners Association_HOA - Community Disclosure	CR-5_B.xdp	02.25.19	Save As File

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

The screenshot shows a 'Fax' dialog box with a close button (X) in the top right. It contains the following fields:

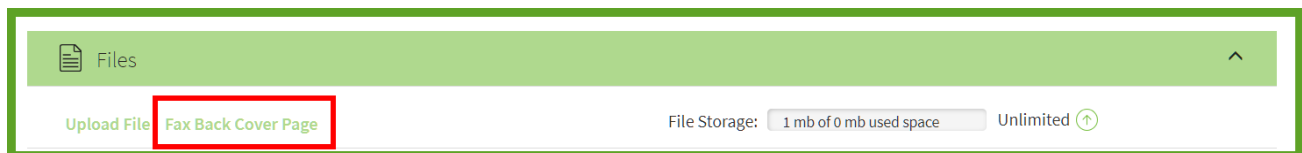
- Fax recipient name:** A text box containing 'Drew A Blanc'.
- Fax number:** A text box containing '407-999-9999'.
- Message:** A large text area containing the message: 'Please find enclosed the Listing Agreement and the Sellers Property Disclosure Form for you to review and sign.' Below this is a note '(500 character limit)'.
- Buttons:** A green 'Send Fax' button at the bottom right and a green checkmark icon to the right of the message field.

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.

A screenshot of a form titled 'Fax-back Cover Page' with a close button (X) in the top right corner. The form contains the following sections:

- Download**: A 'Download' button (highlighted with a red box).
- Send via Fax**: A 'Fax Number *' field with a red asterisk, a placeholder 'Enter the fax number startin...', and a 'Send Fax' button (highlighted with a red box).
- Send via Email**: A 'To *' field with a red asterisk, a placeholder 'Enter subject line', a person icon, and a 'Send Email' button (highlighted with a red box).

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

Training Office
Use this sheet as a fax cover page
Send the fax to: (866) 811-8940
International use: (407) 358-5362

RECIPIENT NAME
RECIPIENT PHONE
RECIPIENT FAX

MESSAGE FROM THE SENDER

- 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.

- Log in and open the transaction.
- 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.

Forms and Files

eSign Print Email Fax **Delete** Copy to Transaction Download

Forms

Add Form

	Sort	Title	Form	Date	
<input type="checkbox"/>	≡	Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-17tb.xdp	02.28.19	Save As File
<input type="checkbox"/>	≡	Sellers Property Disclosure - Residential	SPDR-2.xdp	02.28.19	Save As File
<input checked="" type="checkbox"/>	≡	CR-5_P. Lead Based Paint Disclosure	CR-5_P.xdp	02.28.19	Save As File
<input checked="" type="checkbox"/>	≡	CR-5_B. Homeowners Association_HOA - Community Disclosure	CR-5_B.xdp	02.28.19	Save As File
<input type="checkbox"/>	≡	Modification to Listing Agreement	MLA-5x.xdp	02.28.19	Save As File
<input type="checkbox"/>	≡	Transaction Record	TR-1.xdp	02.28.19	Save As File

- 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.

Delete

Delete Forms

Are you sure you wish to delete the selected forms?

Delete Forms

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.

The screenshot shows the 'Forms and Files' section of a software interface. At the top, there are buttons for 'eSign', 'Print', 'Email', 'Fax', 'Delete', 'Copy to Transaction' (highlighted with a red box), and 'Download'. Below these is a green header bar with a document icon and the word 'Forms'. Underneath is an 'Add Form' section. A table lists several forms with checkboxes in the first column. The first two forms, 'Exclusive Right of Sale Listing Agreement, Transaction Broker' and 'Sellers Property Disclosure - Residential', have their checkboxes checked and are also highlighted with red boxes. The table has columns for 'Sort', 'Title', 'Form', 'Date', and 'Save As File'.

	Sort	Title	Form	Date	Save As File
<input checked="" type="checkbox"/>	≡	Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-17tb.xdp	02.25.19	Save As File
<input checked="" type="checkbox"/>	≡	Sellers Property Disclosure - Residential	SPDR-2.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_P. Lead Based Paint Disclosure	CR-5_P.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_B. Homeowners Association_HOA - Community Disclosure	CR-5_B.xdp	02.25.19	Save As File

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.

The screenshot shows the 'Copy to Transaction' form. It has a title bar with a close button (X). The form contains four input fields: 'New Transaction *' with the value '123 Main St, Anywhere FL 34567', 'Street Address *' with the value '123 Main St, Anywhere FL 34567', 'Property Type' with a dropdown menu showing 'Residential', and 'Transaction Type' with a dropdown menu showing 'Listing'. All four input fields are highlighted with red boxes. At the bottom right, there is a green button labeled 'Copy to Transaction' which is also highlighted with a red box.

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.

Forms and Files

eSign Print Email Fax Delete Copy to Transaction **Download**

Forms

Add Form

<input type="checkbox"/>	Sort	Title	Form	Date	
<input checked="" type="checkbox"/>	≡	Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-17tb.xdp	02.25.19	Save As File
<input checked="" type="checkbox"/>	≡	Sellers Property Disclosure - Residential	SPDR-2.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_P, Lead Based Paint Disclosure	CR-5_P.xdp	02.25.19	Save As File
<input type="checkbox"/>	≡	CR-5_B, Homeowners Association_HOA - Community Disclosure	CR-5_B.xdp	02.25.19	Save As File

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.

Download

☒ Download as a .ZIP file

☒ Lock Forms

Download form

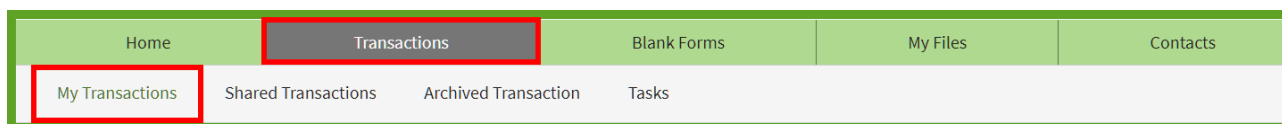
Notes: _____

eSign – (Ultimate Edition feature)

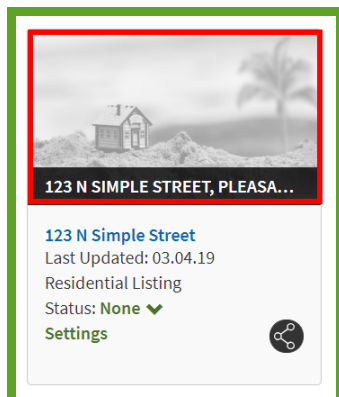
Create an eSign session

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.

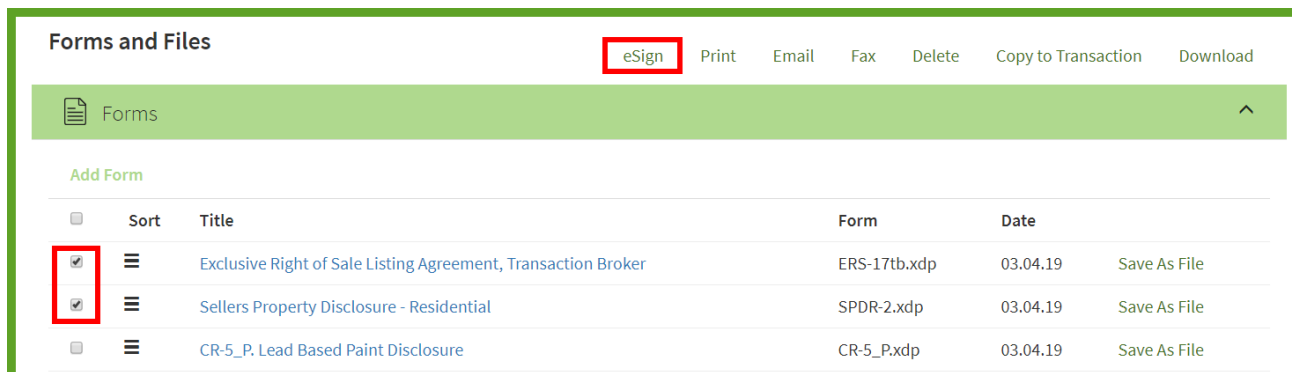


2. Click on the transaction folder that contains the forms or files you need signed.

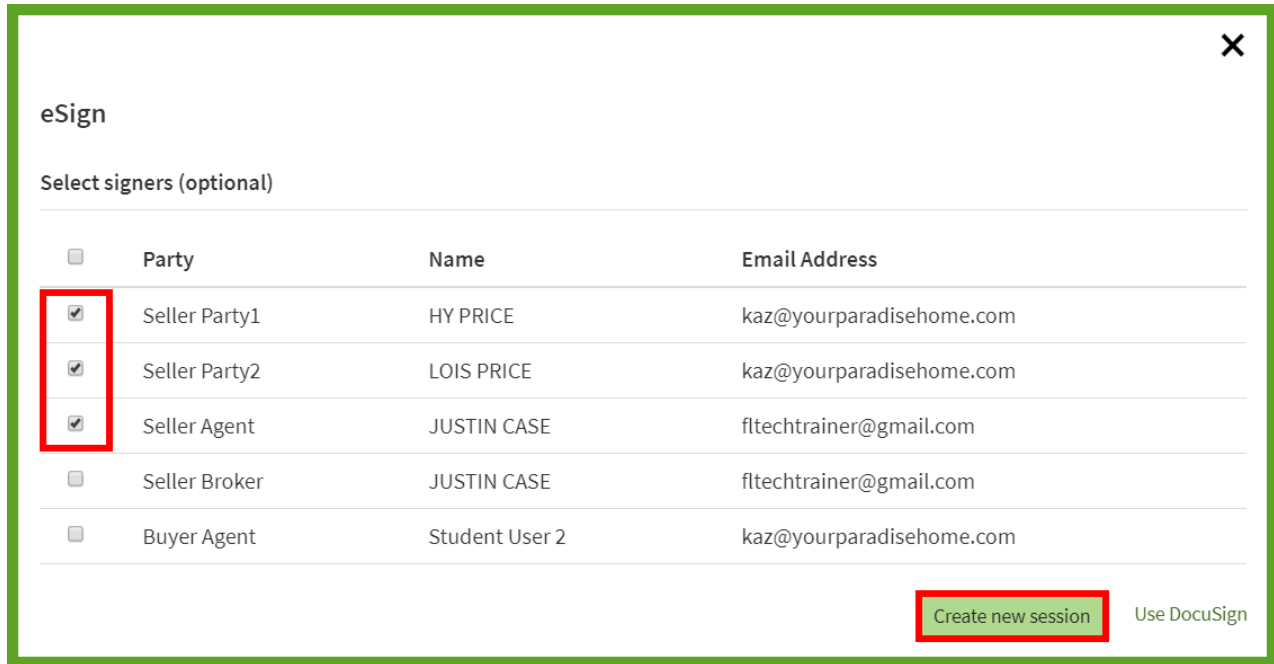


Note: eSign sessions may only be processed through an active transaction. If you have not created an active transaction yet, please follow the instructions in the “Create a new Active Transaction” article first.

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.



eSign

Select signers (optional)

<input type="checkbox"/>	Party	Name	Email Address
<input checked="" type="checkbox"/>	Seller Party1	HY PRICE	kaz@yourparadiseshome.com
<input checked="" type="checkbox"/>	Seller Party2	LOIS PRICE	kaz@yourparadiseshome.com
<input checked="" type="checkbox"/>	Seller Agent	JUSTIN CASE	fltechtrainer@gmail.com
<input type="checkbox"/>	Seller Broker	JUSTIN CASE	fltechtrainer@gmail.com
<input type="checkbox"/>	Buyer Agent	Student User 2	kaz@yourparadiseshome.com

[Create new session](#) [Use DocuSign](#)

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.

The screenshot shows the top toolbar of the Form Simplicity interface. The 'Add Signer' button, represented by a blue icon with a plus sign, is highlighted with a red rectangular box. Other buttons in the toolbar include 'Address Book', 'Move Up', 'Move Down', 'Delete', 'Previous', 'Next', 'Cancel', and a help icon.

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

The screenshot shows the 'Signer Information' form. It has fields for 'First Name' (Richard), 'Last Name' (Barnett), and 'Email Address' (awesomerealtor@hotmail.com). There is a dropdown menu for 'Authentication' currently set to 'None', and a checkbox for 'Signing in-person'. Red arrows point to the 'Authentication' dropdown and the 'Signing in-person' checkbox.

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.

The screenshot shows a table of signers. The table has columns: Seq., First Name, Last Name, Email Address, Authentication, and Action. There are two signers: Jonathan Smith (jon@me.com) and Jane Smith (jane@me.com), both with 'None' as the authentication method. Red arrows point to the 'Edit' icons (pencil icons) in the 'Action' column for both signers.

Seq.	First Name	Last Name	Email Address	Authentication	Action
1	Jonathan	Smith	jon@me.com	None	[Edit]
2	Jane	Smith	jane@me.com	None	[Edit]

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.

The screenshot shows the same table of signers. In this view, the 'Seq.' column has checkboxes. The checkbox for '2' (Jane Smith) is checked. Red boxes highlight the 'Move Up', 'Move Down', and 'Delete' icons in the top toolbar, and the 'Next' icon in the bottom right corner of the toolbar.

Seq.	First Name	Last Name	Email Address	Authentication	Action
<input type="checkbox"/> 1	Jonathan	Smith	jon@me.com	None	[Edit]
<input checked="" type="checkbox"/> 2	Jane	Smith	jane@me.com	None	[Edit]

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.

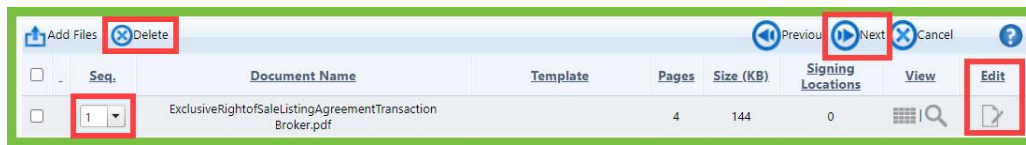
Step 3 – Upload Session Documents

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.

You may add a personal note to your signer(s). Please note: Instructional text on how to proceed with the e-Signing Session will be appended to the bottom of your note.

Previous Finish Cancel

B I U A x' x' [Rich Text Editor Icons] Times New ... 3 [Font Settings]

Hello Jon,

Are you ready to be a home owner? Here is the contract. I am sending it to you via eSign session so that you may sign it electronically and have the assurance that it is safe, secure and legally binding. Call me if you have any questions!

Sally Seller

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.

Welcome Back Jessica Rosado! Sign Out

Signing Session Information

Session stats. You can download the latest documents and change the password for the session.

Transaction Name : Mr. & Mrs. Nguyen	Session Title : 123 Simple Street - S...	Password Set : No
Create Date : 5/11/2015 11:20:35 AM EDT	Current Status : In Progress	Session Password : <input type="password"/>
Last Modified : 5/11/2015 12:41:43 PM EDT	Download : Latest Version	Confirm Password : <input type="password"/>
CC Email :	Email Message : Click to View	Edit Session Update Password

Session Signers

Here is a list of invited signers. You can edit the name/email address and resend the invitation.

Seq.	First Name	Last Name	Email Address	Authentication	Status	Action
1	jane	perez	jane@me.com	None	Invited	
2	Jonathan	Smith	jon@me.com	None	Pending Invite	

Session Documents

Here is a list of session documents. Click on the "view" icon to open the document and save the PDF version to your computer.



Seq.	Document Name	Template	Pages	Size (KB)	Signing Locations	View	Edit
1	AddendumtoContract.pdf		1	118	4		
2	ContentLicenseAgreement.pdf	Content License Agreement	6	61	17		
3	ResidentialContractForSaleAndPurchase.pdf		12	90	0		

Session Activity Log

Here is a list of all activity for this session. Click on the "view" icon to open the document and save the PDF version to your computer.

Action Date	IP Address	Description	View
5/11/2015 12:41:43 PM EDT	65.117.180.1	Invitation sent to jane.perez(jane@me.com) by Jessica Rosado	
5/11/2015 12:41:42 PM EDT	65.117.180.1	eSignOnline Session Created by Jessica Rosado	

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.

Seq.	First Name	Last Name	Email Address	Authentication	Status	Action
1	David	Jones	DavidJ@email.com	None	Invited	 

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.

Status	Action
Invited	 

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

Status	Action
Invited	 

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.

eSign Sessions				
Name	Status	Team Member	Date/Time	Action
123 N Simple St, Pleasantville FL 32757	Sent	User 2, Student	10.12.20 / 11:30 AM	Copy Cancel

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

Welcome Back
Student User 2!
Sign Out

Signing Session Information

Session stats. You can download the latest documents and change the password for the session.

Transaction Name : 123 N SIMPLE STREET, ...
Create Date : 04/17/2019 1:25:27 PM EDT
Last Modified : 04/17/2019 1:28:09 PM EDT
Expires On : N/A
CC Email :

Session Title : 123 N SIMPLE STREET, ...
Current Status : Sent
Download :
Reminders : Off
Email Message: [Click to View](#)

Edit Session

Session Signers

Here is a list of invited signers. You can view, edit signer information, or resend the invitation.

	First Name	Last Name	Email Address	Authentication	Status	Actions
	HY	PRICE	kaz@yourparadisehome.com	None	Invited	
	LOIS	PRICE	kaz@yourparadisehome.com	None	Invited	
	JUSTIN	CASE	fitechtrainer@gmail.com	None	Invited	

Session Documents

Here is a list of session documents. Click on the "view" icon to open the document and save the PDF version to your computer.

	Seq.	Document Name	Template	Pages	Size (KB)	Signing Locations	View	Edit
	1	ExclusiveRightofSaleListingAgreementTransaction Broker.pdf	Exclusive Right of Sale Listing Agreement, Transaction Broker	4	108	22		
	2	SellersPropertyDisclosureResidential.pdf		5	49	0		

Session Activity Log

Here is a list of all activity for this session. Click on the "view" icon to open the document and save the PDF version to your computer.

Action Date	IP Address	Description	View
04/17/2019 1:28:09 PM EDT	65.117.180.1	Invitation sent to JUSTIN CASE(fitechtrainer@gmail.com) by Student User 2	
04/17/2019 1:28:09 PM EDT	65.117.180.1	Invitation sent to LOIS PRICE(kaz@yourparadisehome.com) by Student User 2	
04/17/2019 1:28:09 PM EDT	65.117.180.1	Invitation sent to HY PRICE(kaz@yourparadisehome.com) by Student User 2	
04/17/2019 1:28:09 PM EDT	65.117.180.1	eSignOnline Session Created by Student User 2	

Powered by GoPaperless

Help

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.

form simplicity
transactions made simple

Alice Agent has invited Jim Buyer to sign:
123 Simple Street_Sale

Let's Get Started!

Click the link below to start the review and signature process. The signing ceremony is not complete until you have selected your signature, reviewed and agreed to the disclosure, signed all required documents and confirmed the signing completion.

If you are not the signer or need to delegate the document to another party to sign, please [click here](#)

[Review & Sign](#)

Watch how to sign documents

To contact the sender, please email: jessicar@floridarealtors.org

Powered by GoPaperless Solutions

Thank You

You are receiving this because you were sent a document to sign by one of our current users.

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

2. Then, they confirm name is spelled correctly.

1 Please review and make any corrections to your name and initials.

Name : Jim Buyer Initials : JB

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

2 Create your signature: [Choose a signature and initials](#) - or - [Draw your signature and initials](#)

☐ Jim Buyer JB ☐ Jim Buyer JB

☐ Jim Buyer JB ☐ Jim Buyer JB

☐ Jim Buyer JB ☐ Jim Buyer JB

4. Agree to the Consumer Disclosure and click the “Start” button.

3 View and agree to the following disclosures:

I agree that the signature and initials I have selected above will be the electronic representation of my signature and initials for all purposes when I use them in any eSignOnline™ Signing Session, including legally binding documents and contracts; just the same as traditional pen-and-paper signature or initials.

☐ I agree to the [Consumer Disclosure](#)

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

Date: Buyer:

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

Signing Ceremony Completion

All required fields have been completed.
Would you like to complete your signing session?

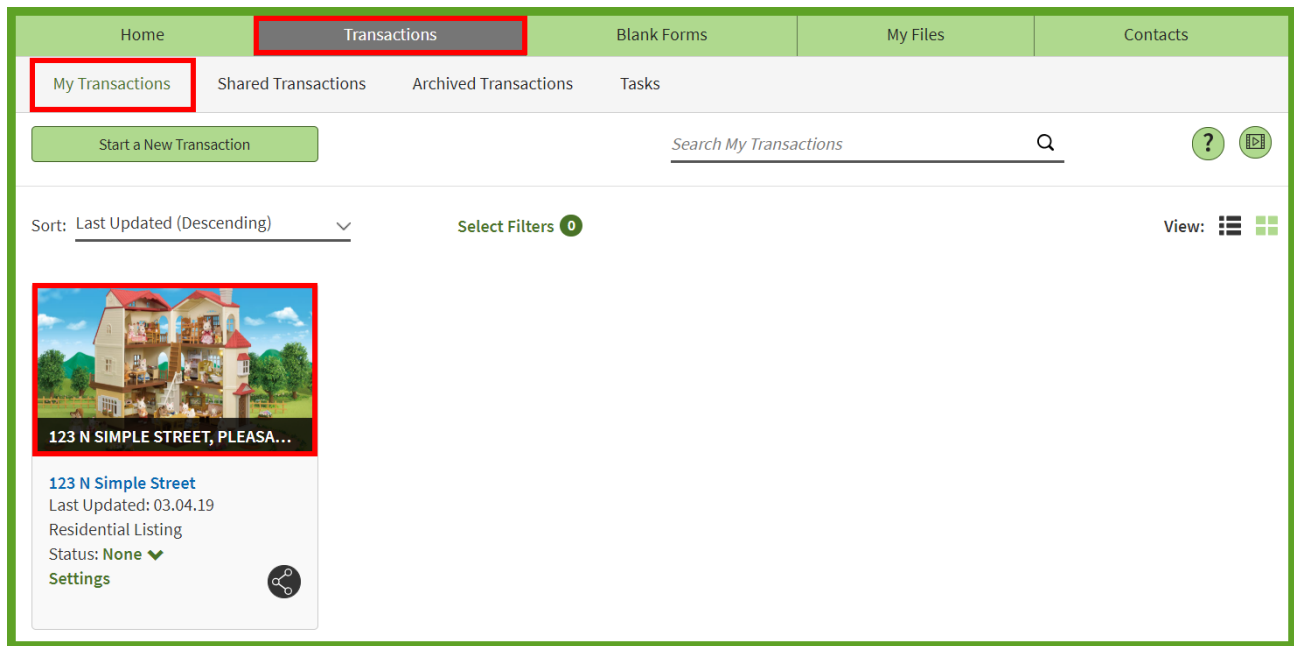
Please note, if you have signed multiple documents this process could take a few minutes. The browser window will refresh and allow you to download your copy of the signed document(s).

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.

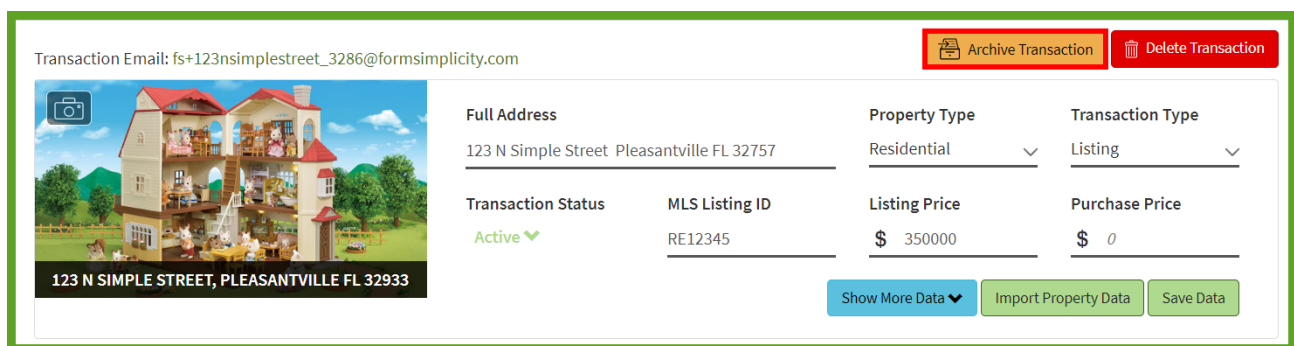
Transactions - Archive Transaction

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

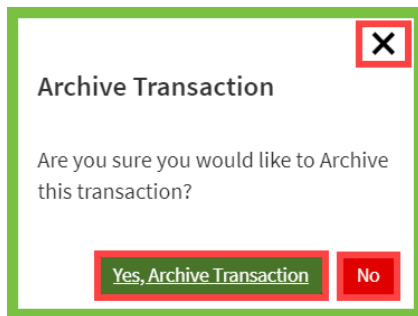
1. Log in and click on **“Transactions”** from the main navigation menu at the top of the Form Simplicity home page which will automatically take you directly to the **My Transactions** screen. Then locate the transaction that you wish to archive and open it.



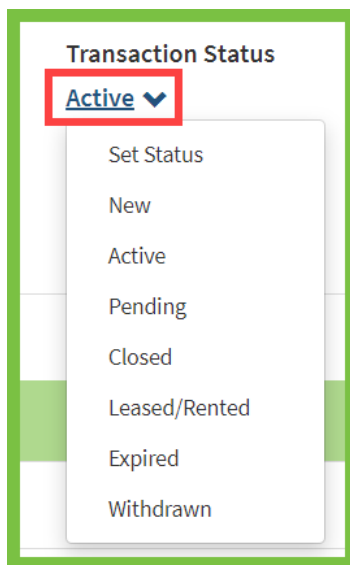
2. In the upper right-hand corner of the transaction record, click on the **“Archive Transaction”** button.



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.**”

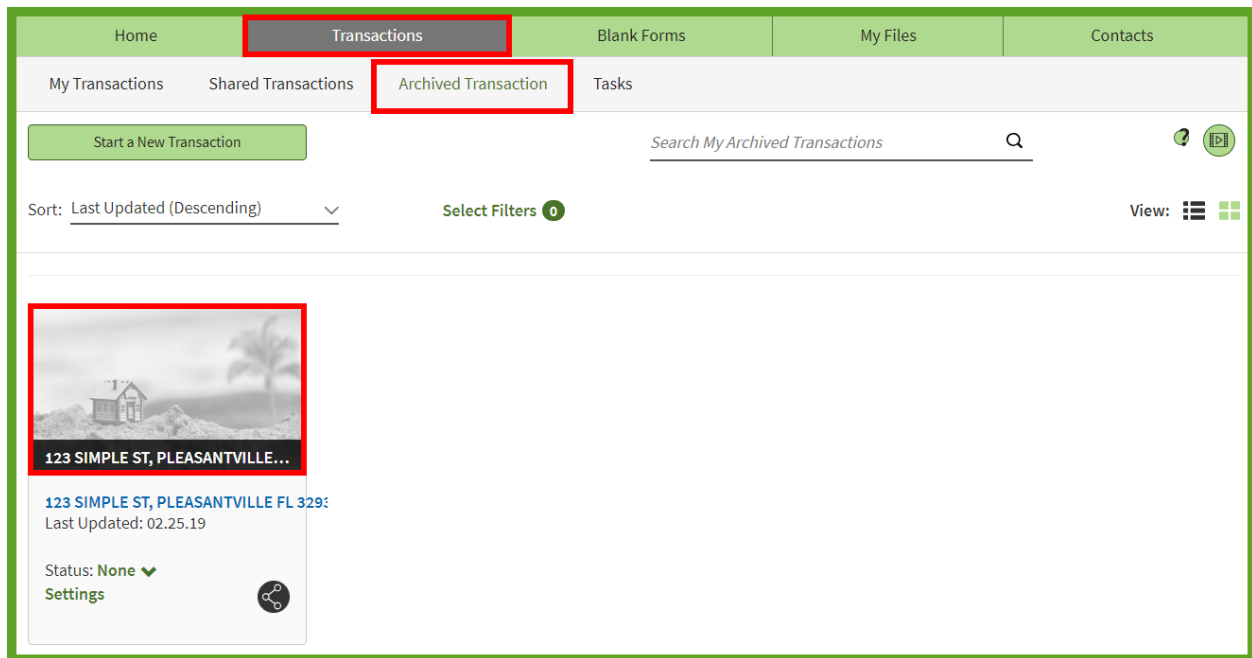


5. This will move the transaction and all its contents to the Archived Transactions for long-term storage.

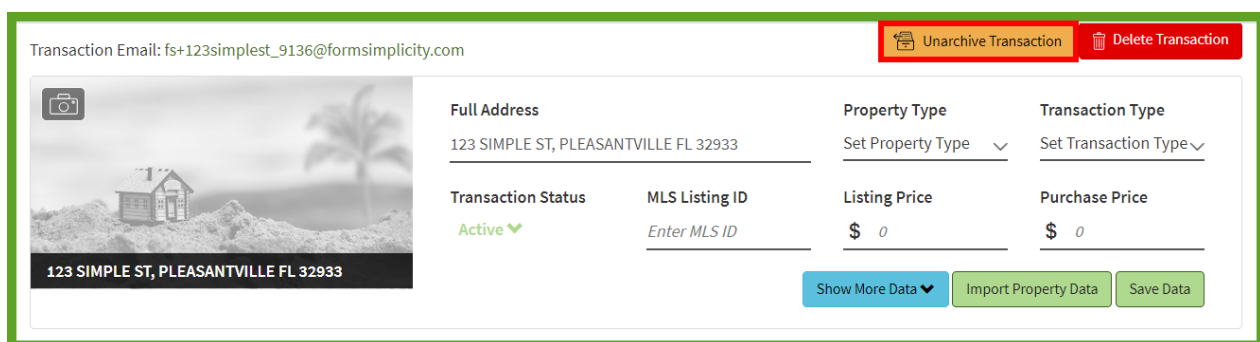
Transactions – Unarchived Transaction

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

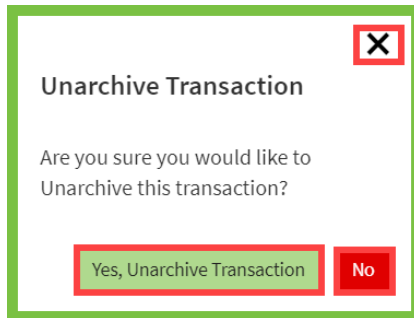
1. Log in and click “**Archived Transactions**” from the **Transactions** secondary navigation menu at the top of the Form Simplicity home page. Then locate the transaction that you want to make Active again.



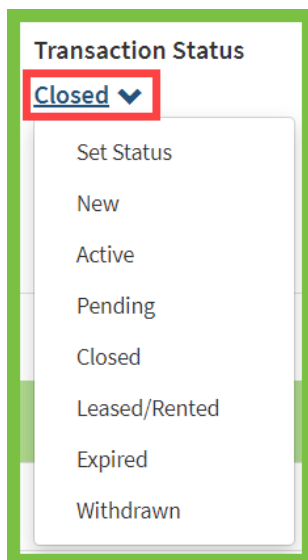
2. In the top right corner of the transaction record, click on the “**Unarchive Transaction**” button.



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.

