Form Simplicity Real Estate Transaction (3CE)

A Form Simplicity QuickStart Guide



Download the Tech Helpline App



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 <u>forms.floridarealtors.org</u>.

Who owns Form Simplicity?

Form Simplicity is created and owned by Florida Realtors[®]. The Florida Realtors[®] Emerging Technology Committee 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.

Welcome to Description User ID Password I would like to reset or register my password. Log-in	Sack to Sign-in Page Password Registration / Reset Have questions? We can help! Name Search CALL US 407.587.1450 Cisowski CHAT NOW EMAIL US Click here Kaa Florida Click here
 Back to Name Search Password Regist / Reset Select Member Name 	ch tration CALL US 407.587.1450 Questions or Support CHAT NOW EMAIL US Click here

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: Introduction

My Preferences allows you to setup email notifications, build your email signature, set your time zone, create a new login ID, enable 2-Factor Authentication, and manage your email address in Form Simplicity.

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.

Form Simplicity	_	Welcome	e, Student User 2	Notificati	ions Switch User	Preferences	Help	Logout
Home	Transactions	Blank Forms	My Files		Contacts		remplates	

- 2. There are six sections in the *My Preferences* section:
 - a. Account Information
 - b. General Settings
 - c. Email Notifications
 - d. eSign Preferences & Templates (Appears only for Ultimate Edition Users)
 - e. Security Settings
 - f. Integrations

My Preferences	
Account Information	~
General Settings	~
Email Notifications	~
eSign Preferences & Templates	~
Security Settings	~
Integrations	~

My Preferences: General Settings

In the *General Settings* section, select the proper time zone so that all times displayed in Form Simplicity will match your respective time zone. Create a custom HTML 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.

Form Simplicity		Welcome	e, Student User 2 Notifica	tions Switch User	Preferences	Help Logout
Home	Transactions	Blank Forms	My Files	Contacts	Т	emplates

- 3. In the *My Preferences* screen, click on the *General Settings* section to expand it.
- 4. Under *Email Settings*, enter your *Email Signature* in the field provided. Under *Transaction Email Address*, you may elect to remove the Transaction Email Address footer from your outgoing email messages from a transaction. *Note: When this option is turned off, you will see an option to add it on the fly in any email draft from a transaction.* Under *Location Settings*, click on the *Time Zone* drop-down menu and select the proper time zone in your Form Simplicity account so that all times displayed within the application will match your selected time zone.

General Settings	^
Email Settings	Location Settings
Email Signature	Time Zone
•	Eastern Time (Orlando, Atlanta, Boston)
Kaz Cisowski Technology Training Manager FloridaRealtors® 7025 Augusta National Drive, Orlando, FL 32822 talk: 407.438.1410, ext. 2746 fax: 407.438.1411 visit: http://www.floridarealtors.org	
(automatically included in all outgoing emails, collaboration invitations & eSign sessions) Transaction Email Address Include the transaction email address in my outgoing transaction emails	
To send me files, simply send them as attachments to fs+[propertystreetaddress]@formsimplicity.com.	
Save changes	

5. Once complete, click the **"Save Changes**" button. Then the Form Simplicity confirmation message "*We have successfully saved your settings*." will appear below the main navigation menu.

My Preferences: Email Notifications

You can make Form Simplicity work for you by activating push notifications to your email address listed in the *Account Information* section 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.

Form Simplicity		Welcom	e, Student User 2 Notifica	tions Switch User	Preferences	Help Logout
Home	Transactions	Blank Forms	My Files	Contacts	Т	emplates

- 2. In the *My Preferences* screen, click on the *Email Notifications* section header to expand it.
- 3. 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. For each slider set, Form Simplicity confirmation message "*We have successfully saved your settings*." will appear below the main navigation menu.

Email Notifications		^
Notifications		Notification Settings
When a task is due	Send	Notifications for transactions shared with me
When an assigned task is marked as complete	Send	Receiving Notifications
When I receive a fax	Send	By default, your email notifications are sent to the email address listed in the
When I receive an email message and/or attachment	Send	Account Information section above. If you would instead like to send those notifications to an Alternate Email you may enter it below. You may also CC an additional email address on the potification emails. Please provide the email
When a transaction is shared with me	Send	address(es) below and click the Save Email button(s).
When a comment is made on a shared form or file	Send	Alternative Email Address
When my transaction checklist is approved or returned as incomplete	Send	CC Notification Email Address
		Save Email

Note: Email notifications are sent to the email address that is listed in the Account Information section. If you would like to have your notifications sent to a different email address, type it in the Alternate Notification Email Address field and click the "Save Email" button. Also, if you would like to CC an additional email address on the notification emails, type it in the CC Notification Email Address field and click the "Save Email" button.

4. You will receive in your inbox, the professional looking HTML format email notifications that get sent out when tasks are due, a fax is received, a file is emailed into the transaction, comments are left on shared documents, and transactions are submitted for review and approved or returned. Just click on the **"Click here to go directly to this file"** link to see what file was received in the transaction.

Form Simplicity
Hi Student User 2,
You have a new file New Listing Checklist.pdf in Form Simplicity.
Transaction Name: 123 N SIMPLE STREET, PLEASANTVILLE FL 32933
Click here to go directly to this file
Sincerely,
Your Form Simplicity Team
Need assistance? Contact us: 407-587-1450 support@formsimplicity.com We are here Mon - Fri 9 a.m to 8 p.m ET Sat 9 a.m to 5 p.m ET Powered by Form Simplicity

My Preferences: Integrations

Form Simplicity will continue to partner with other technology companies to integrate with to develop deep integrations through integration apps. The apps will provide users with exceptional network context within the tools, and in the format, you're already using.

Integrati	ons							^
Form Sim	plicity Integration Partner	s						
	Google Drive Copy files to & from Google Drive	ON	8	Google Contacts Import your Google Contacts	ON	31	Google Calendar Sync Transaction Dates & Tasks	ON
*	Dropbox Copy files to & from Dropbox	ON	LARNHEST	Earnnest Send earnest money requests	ON	SELLERS SHIELD	Sellers Shield Disclosure Forms Done Better	ON
\$	RentSpree Simplify tenant screening processes	ON	ratemy agent	RateMyAgent Never miss a client review	ON			

eSign Preferences: Email Notifications (Ultimate Edition)

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.

Form Simplicity		Welcom	e, Student User 2 Notifica	tions Switch User	Preferences	Help	Logout
Home	Transactions	Blank Forms	My Files	Contacts	Т	emplates	

Scroll down to the *eSign Preferences & Templates* section and click on the "Manage eSign 2.0 preferences" button.



3. In the *Home/Profile* screen, you can select which emails are sent to you during the eSign session process. By clicking the buttons listed below, you can select/unselect which email notifications that you would like to receive during the eSign session process.

Home / Profile				
Email Notifications				
Session State Session Started YES Session Delegate Notice YES	Session Viewed Session Declined	YES Session Sign	ed TES	
Session Invites Session Reminder Summary	D			
Session Expiration Session Expiring YES	Session Expired	УЕБ		
Session Documents Session Documents YES	D			

eSign Preferences: Attachments (Ultimate Edition)

Include Attachments - When a signing session is complete, the signed documents will automatically be sent as an attachment to the sender.

tachments	
nclude Attachments	YES

eSign Preferences: Set Tag and Markup Settings

Default font sizes can be set up for the Signature, Initial, Date/Time, Form Field (Text), and the Markup Text (Add Text) tags. The font size ranges from 6 to 28. *Note: The larger the font, the more likely the tag will be cut off.*

Set Tag and Markup Setti	ngs				
Signature default font size 16 Form Field default font size	V	Initial default font size 16 Markup Text default font s	v	Date/Time default font size	▼
16	•	16	•		
Notes:					

eSign Preferences: Signatures (Ultimate Edition)

The Default Signature Style (Choose Style tab) or Draw Your Signature (Draw tab) can be set up and saved in the *Signatures* section of the *Home / Profile* screen. Just click and sign!

1. In the *Signatures* section, you will be able to select your default signature style when eSigning. Click on the **"Choose Style"** tab.

Signatures		
Choose Style	Draw	
	Kaz Cisowski KC	
	Select a signature and initials and click select	
<	Kay Cisowski KC	>

2. In the *Signatures* section, you will be able to draw your signature when eSigning. Click on the **"Draw"** tab.

Signatures		
Choose Style Draw		
Signature	Clear	Initials Clear
KCiði	Justi	KC

3. If you did not set up your email signature in the *General Settings* section of *My Preferences*, you can also set up and save your email signature that you will send during the signing process.

Email Signature
Normal ፣ īT፣ <u>A</u> ፣ B / U ≟ ≔ ¤ x₂ x² ⊡ 판 판 판 판 표 표 · ↔
Kaz Cisowski Technology Training Manager FormSimplicity TM 7025 Augusta National Drive, Orlando, FL 32822 talk: 407.438.1400, ext. 2746 fax: 407.438.1411 visit: http://www.formsimplicity.com
Update Signature

4. Then click the **"Update Preferences"** button when done.

Notes:		 	

eSign Preferences & Templates: Templates (Ultimate Edition)

Create Templates for commonly used documents sent using eSign. Signer Tags and markups will be saved on the document as a template. 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.

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.

Form Simplicity		Welcom	e, Student User 2 Notifica	itions Switch User	Preferences	Help Logout
Home	Transactions	Blank Forms	My Files	Contacts	Т	emplates

2. Scroll down to the *eSign Preferences & Templates* section and click on the "Manage eSign 2.0 templates" button.



3. At the top of the *Home/Templates* screen, click on the "Add+" button to create a new eSign template. After creating eSign templates, you can search by Template name, description, group or document link.

	Home / T	emplates								
ľ	Search by	7 Template name, description	n, group or document link	Q						Add +
	Group	11 Template Name	1↓ Description	1↓ TemplateType	1↓ Document Link	Signers	Pages	Modified	î↓	Actions

4. Under the *Documents* section on the top of the *Home/Template/Template Draft* page, enter the eSign template in the Template draft field and enter the Description as needed.

Documents	
Template draft	Description
Document Link	

- 5. Upload your document. There are three options when adding a document to a template. The available options are:
 - Drag Files Here Drag and drop your documents to your documents section.
 - **Upload** from your computer or local drive, navigate to the document then select it.
 - **Get from Cloud** to retrieve the files from *OneDrive, Dropbox,* or *Box.com*, navigate to the documents and select them.

Note: The files must be PDF files and saved on your computer.

To **delete** the file, click on the **ellipsis (...)** button under the *Actions* column.

D Uploa	rag Files Here, ad, <u>Get from Cloud</u>		
Document name	Pages	Size	Actions
New Listing Checklist.pdf	3	49 KB	

Under the *Signer role(s)* section in the *Home/Template/Template draft* screen, click on the "+Add Role" button for each signer you will need for this particular file. To delete the signer role, click on the ellipsis (...) button under the *Actions* column.

1	Signer role(s)	+ Add Role
	Roles	Actions
	Seller	•••
	Seller •	•••
	Seller's Agent 🔹	•••

7. The *Signer Roles* pop-up window appears allowing you to choose one or more signer roles as well as the number of a specific signer role. You can add a signer role not on the list by entering it in the "Type a custom role name" field and clicking on the plus (+) sign. That custom signer role will appear at the top of the *Signer Role* list. To delete the custom signer role, click on the "Remove" button. Once the signer role(s) have been chosen, click on the "Select" button. To cancel the action, click on the "Cancel" button or click on the "X".

Signe	er Roles	3	×			
Type a custom role name						
	1	Witness	Remove			
	1	Agent				
	1	Borrower				
	1	Broker				
\odot	2:	Buyer				
3	1	Buyer's Agent				
	1	Buyer's Broker				
_	1	Client				
	1	Cosigner				
	1	Employee				
	1	Employer				
	1	Landlord				
	1	Lender				
			Cancel Select			

8. When the signer roles have been added, the document will show in the section below. You will then be able to assign the fields on your file. Select the first signer role, then click and drag the appropriate *Signer Tag* to the correct location on the form. Repeat the process for each signer role. To change signer roles, click on the drop-down menu on the top left. Be sure to add a signer tag for every role included in the template. Once you have assigned all the fields to your template, click on the **"Save"** button in the top right corner.

		Cancel Save
	Seller 1 ▼ ① 1/3 ④ Q 100% €	
Signer Tags: -	• NEW LISTING CHECKLIST	New Listing > Pages: undefined
∑ initiais	SELLER Soler 1 VILS #	Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannessen Mannes
Form Field	MAILING ADDRESS:	Management Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran Maran M
Check	TELEPHONE #: WORK: HOME: CELL: FAX:	Barran Barra Bar

9. eSign will now know where to apply fields for that file in the eSign session.

Form Simplicit	y 🔳		Þ						
Home / Temp	lates								
Search by Temp	late name, description, group o	r document link		Q					Add +
Group î↓	Template Name	Description 1	TemplateType	10 Document Link	Signers	Pages	Modified	†↓	Actions
	New Listing Checklist	Used for Reside	User Template		3	3	01/10/2022		•••
	Template draft		User Template		0	0	01/08/2022		•••

eSign Preferences & Templates: Default Recipient Ordering

- 1. You can set a default for the *Recipient Ordering* when you create eSign sessions. When *Recipient Ordering* is enabled (Yes), the recipients will receive their signing session invite emails in sequential order. If *Recipient Ordering* is disabled (No), all the recipients will receive their session invite emails simultaneously.
- 2. Users can save a *CC-Recipient* that will always be added to their eSign sessions.



3. The name and email address saved above will appear in the eSign pop-up window when the user creates an eSign session.

				×
eSign				
Select sig	ners (opt	ional)		
Select from default eS	n the peo ign sessio	ople below to include in on settings and custom t	this eSign session and set the emplates in your Preference	e order in which they appear. You can manage your s page under eSign Preferences & Templates.
		Party	Name	Email Address
ŧ		Seller Party1	Marshall Law	kaz@yourparadisehome.com
ŧ		Seller Party2	Marsha Mello	kaz@yourparadisehome.com
ŧ		Seller Agent	Kaz Cisowski	kazc@floridarealtors.org
‡		Seller Broker	Kaz Cisowski	kazc@floridarealtors.org
		CC - Recipient	Kaz Cisowski	kaz@kaz1.net
			Creater	ew session Create new eSign 2.0 session Use DocuSign

Contacts: Add a Contact

By **adding contacts** in Form Simplicity, you will 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, a service provider, a cooperating agent, or even you can be a contact. You can add contacts as needed to your address book for use on any transaction.

1. To add a contact in Form Simplicity, click on the **"Add a Contact"** button in the *Useful Tools* section on the bottom of the Form Simplicity home page.



2. Enter your contact's information in the *New Contact* pop-up window. Add notes on a contact for future reference in the *Notes* section. Click the "Create Contact" button in the lower right corner of the contact information record. Then the Form Simplicity confirmation message "Contact added!" will appear below the main navigation menu. *Note: First Name and Last Name are required entries.* If you wish to cancel, click on the "X" button in the upper right corner.

			×
New Contact			
First Name *		Last Name *	a l
Anna		Nimmity	
Street Address			
1234 Unknown Blvd			
City		State	Zip
Unknown		FL	33333
Home Email		Work Email	
kaz@yourparadisehome.co	m	23	
Home Phone	Work Phone		Cell Phone
	-		(321) 123-1234
Home Fax	Work Fax		Group
-	-		<u> </u>
Lead Source		Company Na	ime
Notes	0	13 	
Very High Maintenance Buyer.			
			Create Contact

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

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* screen.



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



- 3. The *Import Contacts from ...* pop-up window appears showing the three sources are:
 - Your Google Contacts (to import Google Contacts, see page 19)
 - Your Outlook Contacts
 - Your vCard Contacts



- 4. After importing the contacts from Outlook, select the **Outlook CSV** button, click on the **"Browse"** button to locate the saved .csv file, then click on the **"Import CSV file"** button in the lower left corner of the *Import Contact from...* pop-up window.
- 5. After importing the contacts from your portable devices, click on the **"Browse"** button to locate the saved .vcf file, then click on the **"Import vCard file"** button in the lower left corner of the *Import Contact from...* pop-up window.
- 6. If you wish to cancel, click on the **"X"** symbol in the upper right corner.

Contacts: Import Contacts - Gmail

Import your Gmail account contacts into Form Simplicity that you intend to use on a transaction.

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.

	Home	Transactions	Blank Forms	My Files	Contacts	Templates
Pe	eople Groups					

2. Click on the **"Import Contacts"** button.



3. In the *Import Contacts from...* pop-up window, select the **"Google Contacts"** button. If you enabled the *Google Contacts* integration in *Preferences*, the **"List Contacts"** button will appear. Click on the **"List Contacts"** button.

Import Contacts from	٢
Google Contacts Outlook CSV vCard(VCF) Click the List Contacts button to select your Google Contacts that you wish to	-
List Contacts	

4. If the user did not enable the *Google Contacts* integration in *Preferences*, they will need to authenticate each time they wanted to import contacts. In the Google Contacts pop-up window, click on the "Sign in with Google" button.

Google Contacts Import your Google Contacts
The Google Contacts integration connects your Google Contacts with Form Simplicity enabling you to easily select and import your important contact records directly into your Form Simplicity Contacts.
G Sign in with Google
Category: Productivity Company website: https:/contacts.google.com/

Note: <u>This is not a Data Sync.</u> This is a one-way import of the Gmail 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 **New Group** name, log in and select **"Contacts"** from the main navigation menu at the top of the Form Simplicity home page. Then click on **"Groups"** in the *Contacts* sub-menu.



2. Click on the **"New Group"** button in the *Groups* pop-up window.



3. Assign a name to your group and click the **"Add Group"** button or click on the **"X"** button to cancel the action.

×
Add Group

Groups: Add Contacts to Your Group

1. Switch from **"Groups"** to **"People"** in the *Contacts* sub-menu.

Home	Transactions	Blank Forms	My Files	Contacts	Templates
People Group:					

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. In the *Edit Contact* pop-up window, go to the bottom right corner of the contact record and click on the *Group* drop-down arrow and select a group. After you selected a group for your contact, click on the "Update Contact" button on the lower right hand of the contact information window. Then the Form Simplicity confirmation message "*Contact updated*!" will appear below the main navigation menu.

				×
Edit Contact				
First Name		Last Name		
Anna		Nimmity		
Street Address				
1234 Unknown Blvd				
City		State	Zip	
Unknown		FL	33333	
Home Email		Work Email	8	
kaz@yourparadisehome.c	om			
Home Phone	Work Phone		Cell Phone	
	1 <u></u>		(321) 123-1234	
Home Fax	Work Fax		Group	
<u></u>	. <u></u>		Buyers	~
Lead Source		Company Na	me	
		<i>8</i>		
Notes				
Very High Maintenance Buyer				
				li
			Update Co	ontact

Clauses: Create a New Clause

Creating clauses will allow you to save the phrases or wording you use for Form Simplicity transactions. Standard clauses can be created in Form Simplicity to be use again 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. To create a clause, click on the **"Create a New Clause"** button under the *Useful Tools* section on the bottom of the Form Simplicity home page.



2. In the *Add New Clause* pop-up window, enter the name of the clause, the details of the clause, and click the "Save New Clause" button. Then the Form Simplicity confirmation message "*Clause added!*" will appear below the main navigation menu. Click on the "X" button to cancel. *Note: You may repeat the process and create as many clauses as you need.*

	X
Add New Clause	
Clause Name *	
Purchase Funds	
New Clause Details *	
Seller has the option to declare this contract null and void, if any earnest money deposits are not made on time as required by the contract or if Buyer's earnest money check does not clear.	æ
Save New Cla	ause

3. After creating a clause, agents will find them stored under the *Personal Clauses* section and brokers will find them under *Brokerage Wide Clauses* section to preview, edit, or delete by clicking on "Clauses" from the *Blank Forms* sub-menu at the top of the page.

Sort:	Created Date (Descending) 🗸 🗸		Search Clauses	Q ? 🗈
Crea	te New Clause Delete			50
				EXPAND ALL / COLLAPSE ALL
Brok	erage Wide Clauses			^
	Name	Created By	Created Date	
	FS Webinar The Wishful Thinking Buyer Clause	Trainer Kaz Cisowski	04.26.2022	22
	Purchase Funds	Trainer Kaz Cisowski	12.27.2021	
	Building Permits	Trainer Kaz Cisowski	08.05.2021	
	Specific Repairs to be Done by Seller	Trainer Kaz Cisowski	08.05.2021	
	SOILS CONDITION - EXAMPLE OF DISCLOSURE	Trainer Kaz Cisowski	05.29.2020	
	Personal Property Items	Trainer Kaz Cisowski	01.29.2018	
Pers	onal Clauses			^
	Name	Created Date		
	Purchase Funds	04.26.2022		50 201
	SELLER - Seller Disclosure	04.19.2022		201
	ACCEPTANCE OF BACK-UP OFFER	08.13.2021		Sec
	Approval of Buyers Attorney	08.12.2021		

Clauses: Insert Clauses

1. Log in and open the form in your transaction that you wish to insert the clause. Then click on the line where you would like to insert your clause. Click on the **"Insert Clause"** button.



2. From the *Insert Clauses* pop-up window, click on the either the "Insert" button to select multiple clauses or the "Insert & Close" button to select a single clause. You may click on the Clause Name to name of the clause you would like to insert.

Insert Clauses			×
Search Clauses		٩	
ACCEPTANCE OF BACK- UP OFFER	Personal	Insert Insert & Close	•
Appraisal Contingency	Personal	Insert Insert & Close	
Approval of Buyers Attorney	Personal	Insert Insert & Close	
Escrow Address 1	Personal	Insert Insert & Close	
Escrow Agent Company	Personal	Insert Insert & Close	-
		Clos	e

3. As you click on the **"Insert"** or **"Insert & Close"** buttons, the clause(s) will be quickly inserted into the form.

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

Forms Library: Introduction

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 main navigation menu bar at the top of the Form Simplicity home page. This will automatically direct you to the *Forms Library*.

Home	Transactions	Blank Forms	My Files	Contacts	Templa	ates	
Forms Library Forms Packages Clauses							
Sort by: Form Title (A	-Z)	wnload	Search Form	ns Library	<u>a</u>	? 🖻	
Florida							

2. In the *Forms Library* screen, click on the section header of 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.

	F	lome	Transactions Bla	ank Forms	My Files	Contacts	Templa	ates		
	Forms I	Library	Forms Packages Clauses							
S - A	Sort by: Form Title (A-Z) Search Forms Library Q ? Add to Transaction Print Email Download									
F	lorida	а						^		
			Title	Form		Туре	La Ul	ast pdated		
		Q	AS IS Residential Contract for Sale and Purchase	FloridaRealt 6.xdp	ors-FloridaBar-ASIS-	Florida Realtors Contract for Residential Sale and Purcha	r 01 ise 20	NOV 021		
		Q	Addendum to Contract	ACSP-4.xdp		Miscellaneous Contract Add and Supplements	enda 27 20	7 JUN 017		
		Q	Addendum to Vacant Land Contract A. Back Up Addendum	d Contract A. Back Up VLCA-1a.xdp Addendum/Amendment				9 MAR 021		
		Q	Addendum to Vacant Land Contract B. Kick Out Clause	3. Kick VLCA-1b.xdp Addendum/Amendment) MAR)21		

Forms Library: Search Forms

1. To locate a form in a library, type the keyword in the **"Search Forms Library"** search bar, then click the **"magnifying glass**" to begin the search.

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

Forms Library	Forms Packages Clauses			
Sort by: Form Title (A-Z) V Print Email Download	residential	Q	? 🖻

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. Also, you can press the **"CTRL"** key + **"F"** key on your keyboard and type the keyboard. This will highlight all the forms that use the keyboard you typed.

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

3. Or, scroll down the Forms Library until you find the form you are looking for.

Forms Library: Preview a Form

Find the form you would like to preview before you open the form by clicking the **"Preview"** button **(magnifying glass symbol)** 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 the form preview.

Forms Library	Forms Packages Clauses		
Sort by: Form Title	e (A-Z)	Addendum to Contract	1
Add to Transaction	Print Email Dc	Addendum Net	
Florida			
	Title		Гур
	AS IS Residential Contract for Sale Purchase		Flor Res
	Addendum to Contract		/lis inc
	Addendum to Vacant Land Contra Addendum	Buyer: Date: Buyer: Date: Seter: Date:	٨dc
Q	Addendum to Vacant Land Contra Out Clause	Seler: Outo: ACDA: No.617 Control	۸dc

Forms Library: Print

Print a blank form from the Forms Library 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, you can print the required forms for them to sign and send back.

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

Home	Transactions	Blank Forms	My Files	Contacts	Templates	
Forms Library	Forms Packages Clauses					

2. In the *Forms Library* screen, click on the section header on the forms library you would like to open. Select the form(s) you need by placing a check mark in the box to the left of the form's name. Then click on "Print", which is located at the top of your first *Forms Library* section. *Note: You can also click on the "Printer" icon on the Floating Sidebar on the left side.*

	(Add to Tr	ransaction	Print Email Download			
(+)		Flori	a				^
F				Title	Form	Туре	Last Updated
			Q	AS IS Residential Contract for Sale and Purchase	FloridaRealtors-FloridaBar-ASIS- 6.xdp	Florida Realtors Contract for Residential Sale and Purchase	01 NOV 2021
			Q	Addendum to Contract	ACSP-4.xdp	Miscellaneous Contract Addenda and Supplements	27 JUN 2017

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

× Print
Please select the number of copies you wish to print $ \underbrace{1 \qquad \checkmark} $
Each copy will have a unique serial number Print Forms

Forms Packages: Create a Forms Package

A **Forms 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 the forms and files will be automatically added to the transaction.

1. Create a forms package by clicking on the **"Create a Forms Package"** button on the bottom of the Form Simplicity home page.



2. In the *New Forms Package* pop-up window, name the package (i.e. *Residential Listing Package*), and click on the **"Create Forms Package"** button.

New Forms Package	×
Forms Package Name	
Residential Listing Package	
	Create Forms Package

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

3. In the *Forms Package* screen, you will need to click on the **"Add Blank Forms"** and **"Upload Files"** buttons.

Forms Library	Forms Packages	Clauses						
Residential Lis	ting Package							Delete Forms Package
Create Transaction fr	om Package	Print Emai	Download	Copy to Package	Delete			EXPAND ALL / COLLAPSE ALL
Forms								^
Add Blank Forr	ns							
Ti	itle				Form			
Files								^
New File Folde	r Upload Files	Move to folder				File Storage:	0 mb of 140 mb	Unlimited
	Name	-		Description		Da	ate	Size

Forms Packages: Add Blank Forms to the Package

4. Click on the **"Add Blank Forms"** button located below the *Forms* section.

Residential Listing Package		Delete Forms Package
Create Transaction from Package	Print Email Download Copy to Package Delete	
		EXPAND ALL / COLLAPSE ALL
Forms		^
Add Blank Forms		
Title	Form	

5. When the *Blank Form Library* pop-up window opens, click on the "Select a Library" dropdown arrow to select a library of forms; e.g., Brokerage, State Association, or Local Association form libraries. Place a check mark next to the form(s) that you want to add to your package, then click the "Add To Package" button. If you wish to cancel, click on the "X" button in the upper right corner. 6. Then the Form Simplicity confirmation message "*Forms added to the package.*" will appear below the main navigation menu. The forms you selected will now be available in your package for use in a future transaction.

Note: You can search for forms in the **Blank Form Library** by entering one keyword of the form, then clicking on the **Search button (magnifying glass symbol)**. To preview the form(s) before selecting them, click on the **Preview button (magnifying glass symbol)**.

				×			
Blank Form Library							
Select L	listing Q						
< Return	n to Librar	y					
Florid	а						
		Title	Form	Туре			
	Q	Exclusive Right of Sale Listing Agreement for Commercial Property	ERS- 7cp.xdp	Listing Agreements and Commission Forms			
	Q	Exclusive Right Of Sale Listing Agreement, Single Agent	ERS- 16sa.xdp	Listing Agreements and Commission Forms			
	Q	Vacant Land Listing Agreement	VLLA- 3.xdp	Listing Agreements and Commission Forms			
	Q	Modification to Listing Agreement	MLA- 5x.xdp	Listing Agreements and Commission Forms			
	٩	Exclusive Brokerage Listing Agreement	EBLA- 9.xdp	Listing Brokerage Disclosures and Commission Forms			
	٩	Exclusive Right of Sale Listing Agreement, Consent to Transition to Transaction Broker	ERS- 17tn.xdp	Listing Agreements and Commission Forms			
	٩	Short Sale Addendum to Exclusive Right of Sale Listing Agreement	ERSA- 1.xdp	Listing Agreements and Commission Forms			
		Limited Service Listing Agreement	LSLA- 3.xdp	Listing Agreements and Commission Forms			
	Q	Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS- 17tb.xdp	Listing Agreements and Commission Forms			
	Q	Exclusive Right of Sale Listing Agreement, No Brokerage	ERS- 14nr.xdp	Listing Agreements and Commission Forms			
				Add To Package			

7. The form(s) you uploaded will now be listed under the *Forms* section of your package.

Residential Listing Package	Delete Forms Package
Create Transaction from Package Print Email Download Copy to Package Delete	EXPAND ALL / COLLAPSE ALL
Forms	^
Add Blank Forms	
	Form
➡ □ Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-18tb.xdp
➡ ☐ Modification to Listing Agreement	MLA-5x.xdp
Files	^
New File Folder Upload Files Move to folder	File Storage: 1 mb of 140 mb Unlimited
□ Name Description	Date Size
🚔 🗆 New Listing Checklist.pdf	10.14.22 / 11:02 AM .05 mb

Forms Packages: Upload Files to the Forms Package

8. After adding your forms to the *Forms* section of the package, then go to the *Files* section, click **"Upload Files."**

Forms Library	Forms Packages	Clauses			
Residential Lis	Delete Forms Package				
Create Transaction fr	om Package	Print Email	Download Copy to Package Delete	e	EXPAND ALL / COLLAPSE ALL
Forms					^
Add Blank Form	ns				
Ti	itle		Form		
Files					^
New File Folde	r Upload Files	Move to folder		File Storage: 0 mb of 140 mb	Unlimited
	Name	-	Description	Date	Size

9. You can access your files from one of the locations (*My local device, Dropbox* or *Google Drive*) to "Drag 'n drop your files" in the *File Upload* pop-up window. Click on the "X" to remove a specific file. If you want to remove all the files, then click on the "Clear Files" button. You can give it a description if you wish and click the "Save Files" button. Then the Form Simplicity confirmation message "Your file has been successfully uploaded." will appear below the main navigation menu.

File Upload			×
	Drag 'n drop y Accepted file types and size will deper	our files here. Id on your edition of Form Simplicity.	
X	New Listing Checklist.pdf	Folder	
pdf	Add a file description	Select a folder	
	- or select files from one o	f the following locations -	
	P My local device	opbox 🛆 Google Drive	
		Clear Files Save F	iles

10. The file(s) you uploaded will now be listed under the *Files* section of your package.

Residential Listing Package			💼 Delete Forms Package
Create Transaction from Package	rint Email Download Copy to Package Delete	2	EXPAND ALL / COLLAPSE ALL
Forms			^
Add Blank Forms			
Title		Form	
	g Agreement, Transaction Broker	ERS-18t	b.xdp
Sector Modification to Listing Agree	ement	MLA-5x.	kdp
Files			^
New File Folder Upload Files Move	e to folder	File Storage: 1 mb of 140 mb	Unlimited
□ Name	Description	Date	Size
🚔 🗆 New Listing Checklis	st.pdf	10.14.22 / 11:02 AM	.05 mb

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

Forms Packages: Form Display Side-Menu Panel

A collapsible side-menu panel on the forms display allows users to easily switch to another form in their forms package or in their transaction from within an already opened forms.

	Home	Transactions	Blank Forms	My Files	Contacts	Templates	
		Insert C	ilause	\odot \otimes		Υ	
1	Exclusive This Exclus	e Right of Sale List	ing Agreement Agreement ("Agreemer	nt") is between	Fo	orm mplicity	<pre></pre>
2* 3*	and		SIMPLICITY REAL EST	ATE SERVICES		("Seller") ("Broker").	S
4 5 6*	1. Author property	ity to Sell Property: Se y (collectively "Property" and te	eller gives Broker the E) described below, at th erminating at 11:59 p.m.	EXCLUSIVE RIGHT e price and terms de , on	TO SELL the real and escribed below, begin ("Termination	d personal ning on Date"). Upon	

- 1. Click on the *FORMS* tab to expand or collapse the Package Forms selection menu.
- 2. Clicking on any form within the Forms menu will close the currently opened form and open the selected form.
- 3. If any changes were made to the currently opened form, users will be prompted to save those changes before opening the selected form.

	Home	Transactions	Blank Forms	My Files	Contacts	Templates		
Insert Clause								
					_	Package Forms		
	Exclusive Pight of Sale Listing Agreement							
		Bight of Cole Listing	CR-6_P. Lead Based Paint Disclosure Lead Info Pamphlet					
1 2*	I NIS EXCIUS	ve Right of Sale Listing						
3*	3* andSIMPLICITY REAL ESTATE SERVICES					CR-6_B Homeowners Association_HOA - Community Disclosure		
4 5	 Authori property 	ty to Sell Property: Se (collectively "Property"	eller gives Broker the E) described below, at the	EXCLUSIVE RIGHT T e price and terms de	FO SELL the real a scribed below, beg	Modification to Listing Agreement		
6*		and te	erminating at 11:59 p.m.	. on	("Termina			
Forms Packages: Create a Package File Folder

1. Navigate to the *Files* section within a package and click the "New File Folder" button.

Home	Transactions	Blank Forms	My Files	Contacts	Templates					
Forms Library	Forms Packages Clauses									
Residential Li	Residential Listing Package									
Create Transaction	from Package Print E	mail Download Copy to Pac	Delete		EXPAND ALL / COLLAPSE ALL					
Forms					^					
Add Blank For	ms									
	Title			Fo	orm					
≢ □	Exclusive Right of Sale Listing Agreer	ment, Transaction Broker		ER	RS-18tb.xdp					
≑ □	Modification to Listing Agreement			MLA-5x.xdp						
-										
Files					^					
New File Fold	Upload Files Move to folder		File	Storage: 1 mb of 133 mb	Unlimited					
	Name	Description		Date	Size					
≑ □	Signed Documents			11.22.22 / 02:23 PM	I .00 MB					
≑ □	New Listing Checklist.pdf			11.22.22 / 02:20 PM	.05 mb					

2. When the *New File Folder* pop-up window appears, enter a name for the folder (required) and provide a description for the folder (optional). Click the "**Create File Folder**" button. Then the Form Simplicity confirmation message *"Folder successfully created!"* will appear below the main navigation menu.

New File Folder
Folder Name *
Signed Documents
Folder Description
Create File Folder
Folder Description Create File Folder

3. The new file folder will appear at the top of the *Files* section.

🖹 File	es				^
New	r File Folder	Upload Files Move to folder		File Storage: 1 mb of 133 mb	Unlimited
		Name	Description	Date	Size
÷		Signed Documents		11.22.22 / 02:38 PM	.00 MB
ŧ		New Listing Checklist.pdf		11.22.22 / 02:20 PM	.05 mb

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"** tile from the Form Simplicity home screen. It will automatically take you directly to the *New Transaction* pop-up window as seen in Step 2



Notes: ___

- 2. In the first part of the *New Transaction* pop-up window, enter the **Street Address** (required) and assign a **Transaction Name** (required). *Note: The check box will allow you to quickly name the transaction to be the same as the street (property) address.* Then, select a **"Property Type"** (Residential, Commercial, Farm and Ranch, and Vacant Land) and **"Transaction Type"** (Listing, Purchase, Listing & Purchase, Lease/Rental). *Note: When users create a new transaction and set the 'Property Type' to "Residential" and the 'Transaction Type' to "Lease/Rental", the "Tenant Application & Screening Options" button will appear below the photo in the transaction detail page.*
- 3. Under the *Use Forms Package* section of the *New Transaction* pop-up 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 has been created.*
- 4. Then, click the **"Create Transaction"** button. If you wish to cancel, click on the **"X"** button in the upper right corner.

		×							
New T	ransaction								
Street A	\ddress *	Transaction Name * 🗹 Same as address							
123 SIM	PLE ST, PLEASANTVILLE FL 32933	123 SIMPLE ST, PLEASANTVILLE FL 32933							
Propert	ty Type	Transaction Type							
Residen	itial 🗸 🗸	Listing							
Use For	Use Forms Package								
	Name	Usage Created By							
0	ABC Residential Sales Package	Personal User 2, Student							
0	Commercial Listing Package	Personal User 2, Student							
۲	Residential Buyers Package	Personal User 2, Student							
0	Residential Listing Package	Personal User 2, Student							
0	Residential Sales Package	Personal User 2, Student							
	Previous 1 2	3 4 5 6 Next							
		Create Transaction							

- 5. Your new transaction 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 either the "Add Blank Forms" button to select forms from the *Forms Library* or "Add Forms Package" button to select forms from the *Brokerage-wide* or *Personal Forms Packages*. You can also click on the "Add Blank Forms" or the "Add Forms Package" buttons from the *Primary Action Sidebar Menu* on the left side of the transaction details page. *Note: If you do not wish to see the Primary Action Sidebar Menu, click on the "Hide" button. If you wish to unhide the Primary Action Sidebar Menu, click on the "Show" button.*

Note: After clicking on the **"Add Blank Forms"** button, the Form Simplicity confirmation message **"Forms added"** will appear below the main navigation menu. After clicking on the "Add Forms Package" button, the Form Simplicity confirmation message **"NN Package Form(s) successfully added to the transaction"** will appear below the main navigation menu.

upr	Transaction Email: fs+123nsimplestreet_11056265@form	nsimplicity.com	Archive Transaction	Delete Transaction
Collapse		Full Address 123 N Simple Street Pleasantville FL 32757	Property Type Tran Residential → Listi	nsaction Type
Add Blank Forms		Transaction Status MLS Listing ID New ♥ RE12345	Listing Price Pur \$ 0 \$	chase Price
Package	123 N Simple Street, Pleasantville, FL 32757		Show More Data Import Property	Data Save Data
Upload CS Files	Invite Sellers to Complete Disclosures Request Earnest Mo	oney		
Fax-back Cover Page	Broker Review			
	Forms and Files	eSign Print Email	Fax Merge Copy to Transaction	Download Delete
	Forms			^
	Add Blank Forms Add Forms Package Copy	to Files		
	□ Title 🗢		Form 🗢	Date 🗢
	Exclusive Right of Sale Listing Agreer	nent, Transaction Broker	ERS-18tb.xdp	10.14.22
	Sellers Property Disclosure - Residen	tial	SPDR-3.xdp	10.14.22
	Files			^
	New File Folder Upload Files Fax Back Cove	r Page Move to folder File S	Storage: 1 mb of 120 mb used space	Unlimited
	□ Name 🗢	Description 🗢	Date 🗢	Size ⇔
	🔹 🗆 🗁 Signed Documents		05.31.23 / 11:22 AM	.00 MB
	New Listing Checklist.pdf		11.22.22 / 02:20 PM	.05 MB

7. To upload additional files, click the "Upload File" button in the Files section or click on the "Upload Files" button from the Primary action sidebar menu on the left side of the transaction details page. In the File Upload pop-up window, click from the following locations - the "My local device" button to upload files from any of your devices, the "Dropbox" button to upload files from your Dropbox account or the "Google Drive" button upload files from your Google Drive. Then use the "Drag 'n drop your files here" feature. Note: You can add a file description below the file name and place the file in a folder. To delete the uploaded file, click on the "X".

To upload the additional files to the transaction, click on the **"Save Files"** button. Then the Form Simplicity confirmation message **"NN file(s) uploaded"** will appear below the main navigation menu. *Note: To clear all the files in the File Upload screen, click on the "Clear Files" button.*

File Upload		×
	Drag 'n drop Accepted file types and size will de	your files here.
×	New Listing Checklist.pdf	Folder
pdf	Add a file description	Select a folder 🗸 🗸
	- or select files from on	e of the following locations -
	P My local device	Dropbox 🛆 Google Drive
		Clear Files Save Files

Notes: ____

Transactions: Form Display Side-Menu Panel

A collapsible side-menu panel on the forms display allows users to easily switch to another form in their forms package or in their transaction from within an already opened forms.

	Home	Transactions	Blank Forms	My Files	Contacts	Templates		
		Insert C	lause	\odot \otimes		х.		
1	Exclusive Right of Sale Listing Agreement 1 This Exclusive Right of Sale Listing Agreement ("Agreement") is between							
2* 3*	2*							
4 5 6*	1. Authori property	ity to Sell Property: Se (collectively "Property" and te	eller gives Broker the E described below, at the erminating at 11:59 p.m.	EXCLUSIVE RIGHT e price and terms de on	TO SELL the real and scribed below, begin ("Termination	d personal ning on Date"). Upon		

- 1. Click on the *FORMS* tab to expand or collapse the Transaction Forms selection menu.
- 2. Clicking on any form within the Forms menu will close the currently opened form and open the selected form.
- 3. If any changes were made to the currently opened form, users will be prompted to save those changes before opening the selected form.

	Home	Transactions	Blank Forms		My	Files		Conta	acts	Templates
										Transaction Forms
	Exclusive	Right of Sale List	ina Aareeme	nt					->	Sellers Property Disclosure - Residential
									C O	CR-6_P. Lead Based Paint Disclosure
1 2*	This Exclusive Right of Sale Listing Agreement ("Agreement") is between							R M S	CR-6_B Homeowners Association_HOA - Community Disclosure	
3*	and		SIMPLICITY REA	AL ESTA	ATE SERV	/ICES				
								Flood Insurance Notice		
4 5 6*	1. Authori property	ty to Sell Property: Se (collectively "Property"	eller gives Broke) described below arminating at 11.1	er the EX w, at the	Price and	E RIGH	T TO S descri	SELL the	e real ar ow, begi Termina	Modification to Listing Agreement

Transactions: Form Display Command Toolbar

The Transaction Details Forms Display Toolbar contains commands to reduce steps and make it easier to work with forms. The select command options allow the user to execute these commands from within an open form.



Transactions: Create a Transaction File Folder

1. Navigate to the *Files* section within a transaction and click the **"New File Folder"** button. You can also click on the **"New File Folder"** button on the *Primary Action Sidebar Menu*.

HIDE	E Collapse	🖹 Fi	les				^
Ľ,	Add Blank Forms	Ne	w File Folder	Upload Files Fax Back Cover Page	Move to folder File Storage:	1 mb of 93 mb used space	Unlimited
	Add Forms			Name 🗢	Description 🗢	Date 🗢	Size 🗢
	New File Folder	‡		456 S Formality Lane, Pleasantville FL 32757_COA.pdf	Certificate of Authenticity	09.30.22 / 11:40 AM	.12 MB
	Upload 5 Files	≑		ExclusiveRightofSaleListingAgreemen tTransactionBroker.pdf	Received from Digital Signing service.	09.30.22 / 11:40 AM	.21 MB
	Fax-back	‡		New Listing Checklist.pdf	Received from Digital Signing service.	09.30.22 / 11:40 AM	.15 MB
#	# Cover Page	+		New Listing Checklist.pdf		05.27.22 / 01:54 PM	.05 MB

In the *New File Folder* pop-up window, enter a name for the folder (required) and provide a description for the folder (optional). Click the "Create File Folder" button. Then the Form Simplicity confirmation message "Folder successfully created!" will appear below the main navigation menu.

New File Folder
Folder Name *
Purchase Offer - Drew A. Blanc
Folder Description
Signed Buyer's Offer Documents
Create File Folder

3. The new file folder will appear at the top of the *Files* section.

🖹 Files				^
New File Folder	Upload Files Fax Back Cover Page	Move to folder File Storage	2 mb of 104 mb used space	Unlimited
0	Title ⇔	Description ♦	Date 🗢	Size ♦
	🛱 Purchase Offer - Drew A. Blanc	Signed Buyer's Offer Documents	12.27.21 / 08:40 PM	.00 MB

Transactions: Add Files to a Transaction Folder

I. Move to folder Button

1. Select the file(s) to be moved into the file folder. Click the **"Move to folder"** button.

File	s				^
New	File Folder	Upload Files Fax Back Cover Page	Move to folder File S	Storage: 1 mb of 121 mb used space	Unlimited
		Title 🗢	Description 🗢	Date 🗢	Size 🗢
		🗎 Purchase Offer - Drew A. Blanc	Signed Buyer's Offer Document	ts 10.20.21 / 04:07 PM	.00 MB
≑		ASIS Residential Contract for Sale an d Purchase.pdf	Signed Contract	08.31.21 / 04:46 PM	.29 MB
≑		Buyer Package - 1250 ARUBA CT, MAR CO ISLAND, FL 34145_COA.pdf	Certificate of Authenticity	08.31.21 / 04:46 PM	.09 MB
≑		RealtorClosingChecklist.pdf	Received from Digital Signing ser	vice. 08.31.21 / 04:46 PM	.35 MB

2. When the *Move to folder* pop-up window appears, select the folder to move the files into. Click the **"Move to folder**" button.

Move to Folder Folder	X
Purchase Offer - Drew A. Blanc	\sim
Move	files

3. Then the Form Simplicity confirmation message *"The selected files have been moved into your Purchase Offer – Drew A. Blanc folder"* will appear below the main navigation menu. The selected file(s) will appear within the selected folder.

II. PDF File Viewer

With a file opened in the PDF viewer, choose the folder from the Folder drop-down. Click either the **"Save Changes"** or **"Save & Close"** buttons.

			🔒 File Name *	
"AS IS" Resident	ial Contract For Sale And Purchase	Form	ASIS Residential Contract for Sa	ale and Purchase
THIS FORM HAS BEEN APP	ROVED BY THE FLORIDA REALTORS AND THE FLORIDA BAR	Certified Trainer	File Description	
PARTIES:	Hy Price & Lois Price	("Seller"),		
and acree that Seller shall	sell and Buver shall huv the following described Real	("Buyer"), Property and Personal Property	Signed Contract	
(collectively "Property") p	ursuant to the terms and conditions of this AS IS Residentia	al Contract For Sale And Purchase		
and any riders and adder	ida ("Contract"):			
1. PROPERTY DESCR	PTION: 1250 Aruba Court, Marco Isla	nd El 34145		
 (a) Street address, c (b) Located in: 	Collier County Florida Property Tax ID #	57676080009	Folder	
 (c) Real Property: Th 	e legal description is MARCO BCH UNIT 7 BLK 211 LOT	5		
			Purchase Offer - Drew A. Bla	anc
together with all	existing improvements and fixtures including built-in an	poliances built-in furnishings and		
attached wall-to- by other terms of	vall carpeting and flooring ("Real Property") unless specific this Contract.	cally excluded in Paragraph 1(e) or		
(d) Personal Proper	y: Unless excluded in Paragraph 1(e) or by other terms of	f this Contract, the following items	D 1 51	0 1 1 51
which are owned	by Seller and existing on the Property as of the date of (s)(oven(s), refrigerator(s), disby asher(s), disposal, ceiling	the initial offer are included in the	Replace File	Download Fil
drapery rods and	draperies, blinds, window treatments, smoke detector(s), ga	arage door opener(s), security gate		
and other access	devices, and storm shutters/panels ("Personal Property").		(5)	65
 Other Personal F 	Property items included in this purchase are:			
Personal Propert	v is included in the Purchase Price, has no contributory val	lue, and shall be left for the Buver.	Rotate left	Rotate righ
(e) The following iter	ns are excluded from the purchase:			

III. Upload Files

Once the files have been selected to be uploaded in the *File Upload* pop-up window, select the folder to upload the files into. Click the **"Save Files"** button.

File Upload		×
	Drag 'n drop your f	iles here.
× pdf	Realtor Closing Checklist.pdf Completed and Signed Closing Checklist	Folder Purchase Offer - Drew A. Blanc 🗸
	- or select files from one of the fo	Illowing locations -
	A My local device Stoppoor	Clear Files Save Files

IV. Drag and Drop Function

This allows the agent to sort folders, and to drag files into, out of, and within folders.

÷	0	D Folder Name 2	Folder Description	07.26.22 / 04:21 PM	.00 MB
÷	D	Notice Of Intention To Impose Claim On Security Deposit.pdf	Notice Of Intention To Impose Claim On Security Deposit.pdf	04.27.21 / 04:07 AM	.06 MB
÷	0	TrustFunds.pdf		05.22.20 / 01:12 pm	.07 mb
÷		Folder Name 1	Folder Description	07.26.22 / 04:21 PM	.00 MB
ŧ	0	Merge test.pdf	Merged file from Merge service	04.27.21 / 04:07 AM	.07 MB
÷		TrustFunds2.pdf		05.22.20 / 01:12 PM	.19 MB

- Folders can only be sorted amongst themselves and will always appear on top.
- Dragging a file over a folder will add the file to the folder using the **sort handler**.

Notes:	 	

Transactions: 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"** sub-menu, click on the transaction you wish to add a property photo.

Home	Transactions	Blank Forms	My Files	Contacts	Templates
Home Recent Transaction	Transactions ONS View All IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Blank Forms	My Files	Contacts	Templates
	S	ettings			

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

Transaction Email: fs+123nsimplestreet_11056265@forr	rmsimplicity.com Full Address 123 N Simple Street Pleasantville FL 32757		Property Type Residential	Transaction Type
	Transaction Status New ❤	MLS Listing ID RE12345	Listing Price \$ 350000	Purchase Price \$ 0
123 N Simple Street, Pleasantville, FL 32757 Invite Sellers to Complete Disclosures Request Earnest M	oney		Show More Data	Property Data Save Data

Notes: _____

- 3. In the *Upload Property Photo* pop-up 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 *Remove Property Photo* window will appear with a question "Are you sure you want to remove this photo?" Click on either the "Remove photo" button to accept or the "X" 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, a Form Simplicity confirmation message **"Your property photo has been saved"** will appear below the main navigation menu.
- 5. The property photo appears in the transaction.

Transaction Email: fs+123nsimplestreet_11056265@form	Archive Trans	action Delete Transaction		
	Full Address 123 N Simple Street Pleasantville FL 32757		Property Type Residential 🗸	Transaction Type
	Transaction Status	MLS Listing ID RE12345	Listing Price \$ 350000	Purchase Price
123 N Simple Street, Pleasantville, FL 32757			Show More Data 🗸 Import Pr	operty Data Save Data
Invite Sellers to Complete Disclosures Request Earnest Mo	ney			

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.

Home	<u>Transactions</u>	Blank Forms	My Files	Conta	cts	Template	es
My Transactions (151)	Shared Transactions	Archived Transactions	Tasks eSign S	Sessions			
Sort: Last Updated (Descen	nding) 🗸	Select Filters 0	View:	Search My Tr	ansactions	۵	? 🖻
Start a New Transaction	Create and Manage Teams	Archive Delete					
Name		Address	Last Updat	ed Type	Status		
123 N Sir FL 32757	mple Street Pleasantville ,	123 N Simple Street Pleasan FL 32757	tville 12.05.	23 Residential Purchase	New 😽	Settings	с¢)

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

Transaction Email: fs+123nsimplestreet_11056265@form	nsimplicity.com		Archive Trans	action 🗍 Delete Transaction
	Full Address 123 N Simple Street Ple	easantville FL 32757	Property Type Residential V	Transaction Type
	Transaction Status	MLS Listing ID RE12345	Listing Price \$ 350000	Purchase Price \$ 0
123 N Simple Street, Pleasantville, FL 32757			Show More Data	roperty Data Save Data
Invite Sellers to Complete Disclosures Request Earnest Mo	ney			

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

MLS Search	
Enter MLS Listing ID	
RE12345	
Properties Florida Properties ∨	
Import MLS Data	

4. If it has been listed in MLS, your search results will appear. Click on **"Select"** to display the MLS information.

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.

MISLicting ID PE12345			×
MES LISTING ID RE12343			
Property Information			
Address: 122 N Simple Street Pleasantville	EL 22757		
County Parcel: 111-123-321654	FL 32131	County Name: Lake	
Vear Built: 2009 Beds: 4	Baths: 3	Association Fees: \$125.00	
Legal Description: TRANOUIL TERRACE N	132 FT OF LOT 8 BLK 1 F	PB 11 PG 42	
8			
Listing Information			_
Listing Price: \$350,000.00		Listing Start Date: 2010-04-01	
Seller/Landlord Information			
Seller/Landlord Name: Sam and Sally, a m	narried 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 Nationa	l Dr., Orlando, FL 32822		
Brokerage Phone: (407) 438-1400		Brokerage Fax: (407) 438-1411	
Broker Name: Trainer Kaz Cisowski		Broker Email:	
Agent Name: Student User 2	Agent ID: 23761	Agent Email: kaz@yourparadisehome.com	
Include main listing photo		Save information to transaction	
*This will replace your current photo			-

6. This will save the listing data and the listing photo (if the check box is checked) 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 Form Simplicity home screen or click on **"My Transactions"** from the *Transactions* main navigation menu, click on the transaction you wish to import tax data.

Home	<u>Transactions</u>	Blank Forms	My Files	Contacts	Templates
My Transactions (151)	Shared Transactions	Archived Transactions T	Tasks eSign Sessions		
Sort: Last Updated (Des	cending) 🗸	Select Filters 0	View: 📰 📲	Search My Transactions	Q ? D
Start a New Transaction	Create and Manage Teams	Archive Delete			
Name		Address	Last Updated	Type Status	
123 N FL 32	Simple Street Pleasantville 757	123 N Simple Street Pleasant FL 32757	tville 12.05.23	Residential Purchase New 💙	Settings 🎝

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

Transaction Email: fs+123nsimplestreet_11056265@forn	nsimplicity.com		Archive Trans	action 🗍 🗑 Delete Transaction
	Full Address 123 N Simple Street Ple	easantville FL 32757	Property Type Residential ✓	Transaction Type
	Transaction Status New 💙	MLS Listing ID RE12345	Listing Price \$ 350000	Purchase Price
123 N Simple Street, Pleasantville, FL 32757			Show More Data	roperty Data Save Data
Invite Sellers to Complete Disclosures Request Earnest Mo	oney			

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.*

Tax Search				
r House #	Street Name	Туре	Direction	Unit
123	SIMPLE			
City		State	Zip	
		Florida 🗸		
County *(Req	uired)	Parcel ID		
Orange	~			
Find Tax Data]			

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

Tax Search res	sults for 123 SIMPLE ST, FL				
Action Select	Parcel ID 23-35-13-02-28-21	Address 123 N Simple Street	City Pleasantville	State FL	Zip 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 Sim	ple Street		×
Property Information			
Address: 123 N Simple Street, Pleasantvi	le 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/10	9 THE S1/2 LOT 17 (LES	S HIWAY) & (LESS BEG NE COF	R OF S1/2 OF
LOT 17 BLK A RUN S 90 FT W 68.9 FT N 37 D	EG E 70.4 FT N 34 FT E 2	26 FT TO POB) BLK A	
Seller/Landlord Information			
Seller/Landlord Name: AL GORITHEM AND	O OLGA RITHEM		
Full Address: 123 N SIMPLE STREET, PLE	ASANTIVILLE, 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 autopopulate 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. If you have certain service providers involved in the transaction, click on the **"Add Service Providers"** button.

- 1. Add a New Form Simplicity Contact by either clicking on the **"Add a Contact"** button 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.

Forms and Files	eSign	Print	Email	Fax	Delete	Copy to Transaction	Download
Forms							~
Files							~
A Transaction Participants							^

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

C Transaction Participants	•
Add Seller Parties Add Buyer Parties Add Service Providers	
Seller Names:	
Include the selling agent, broker and their brokerage, along with the sellers, in your transaction by clicking Add Seller Parties.	
Buyer Names:	
Include the buying agent, broker and their brokerage, along with the buyers, in your transaction by clicking Add Buyer Parties.	

5. The Seller Information/Buyer Information pop-up window will appear. By clicking on the "Add additional Seller Parties/Add additional Buyer Parties" button, you will add an additional 6 parties for each side. Removing the additional signer fields when they contain information will not clear out the information. The Populate from Party Names checkbox has been added to the Seller and Buyer Full Names to allow better control over whether the field will auto-populate from the Seller/Buyer Party 1 – 8 fields or if they will be independent. To add Seller/Buyer Parties from Form Simplicity Contacts, click on "Add from Contacts."

The users have the ability to add Service Providers to the *Transaction Participants* section of the transaction details page, e.g. Escrow Company, Title Company, Lending Company, Closing Company, Property Appraisal Company, Property Inspection Company.

Seller Information		Seller/Landlord Information	
Add from Contacts Add additional Seller Parties		Add from Contacts Remove additional Soller Parties	
eller Names		Seller/Landlord Names Populate from Party Name	15
inter the names of the sellers or landlords			
Seller Party 1	~	Seller/Landlord Party 1	
Seller Party 2	~	Seller/Landlord Party 2	
Seller Brokerage	~	Seller/Landlord Party 3	
Seller Broker	~	Seller/Landlord Party 4	
Seller Agent	~	Seller/Landlord Party 5	
		Colley/Londland Darty C	
	Save Seller Information	Seller/Landiord Party 6	
	Save Seller Information	Seller/Landlord Party 7	
	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8	
	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage	
	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker	
ervice Providers Information	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker Seller/Landlord Broker	
ervice Providers Information	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker Seller/Landlord Agent	
ervice Providers Information	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker Seller/Landlord Agent	Save Seller Info
ervice Providers Information Add from Contacts Escrow Company	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker Seller/Landlord Agent	Seve Seller Info
ervice Providers Information Add from Contacts Escrow Company Title Company	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker Seller/Landlord Agent	Seve Seller Info
ervice Providers Information Add from Contacts Escrow Company Title Company 2	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker Seller/Landlord Agent	Seve Seller Info
ervice Providers Information Add from Contacts Escrow Company Title Company Title Company 2 Lending Company	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker Seller/Landlord Agent	Save Seller Info
ervice Providers Information Add from Contacts Escrow Company Title Company 2 Lending Company Closing Company	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker Seller/Landlord Agent	Save Seller Info
ervice Providers Information Add from Contacts Escrow Company Title Company 2 Lending Company Closing Company Property Appraisal Company	Save Seller Information	Seller/Landlord Party 8 Seller/Landlord Party 8 Seller/Landlord Brokerage Seller/Landlord Broker Seller/Landlord Agent	Save Seller Info

6. After clicking on the **"Add from Contacts**" button, you will be directed to the *Add From Contacts* pop-up window. In the *Add From Contacts* pop-up 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 five 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. The transaction party table will be built as contacts are added. The Email Address column allows the user to choose whether to use the contact's home or work email address. If additional seller and buyer parties 3 – 8 are enabled, they will appear in the Transaction Role selection.

Add From Contact Step 1: Begin by typing	ts g a contact name in the Search fi	eld, and then click on a name to add it to the tr	ansaction party table.
Name	Home Email	Work Email	
Michael Bailey	kaz@yourparadis	sehome.com	
Alexander Ballard	kaz@yourparadis	sehome.com	
Max Beary		kaz@yourparadi	sehome.com
Kay Biscane	kaz@yourparadis	sehome.com	
Drew A. Blanc	kaz@yourparadis	sehome.com	
Previous Step 2: Use the drop-de contact's information t	own menus to assign the selecter that you wish to include.	ed contacts to their appropriate transaction role	Next es, and to select the
Name	Transaction Role	Email Address	Action
Drew A. Blanc	Seller Party 1 💙	kaz@yourparadisehome.com	Remove
			Add Contacts

7. Select the **Transaction Role** from the *Transaction Role* drop-down menu to specify what transaction role should be assigned to the selected contact. Select the **Service Provider Type** from the *Service Provider Type* drop-down menu to specify what service provider type should be assigned to the selected contact.

Transaction Role	Service Provider Type
<u>Seller Party 1</u> ❤	Escrow Company 💙
Seller Party 1	Escrow Company
Seller Party 2	Title Commonly
Seller Party 3	Title Company
Seller Party 4	Title Company2
Seller Party 5	Lending Company
Seller Party 6	Lending company
Seller Party 7	Closing Company
Seller Party 8	Appraisal Company
_Seller Broker	
Seller Agent	Inspection Company

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

Step 2: Use the drop- contact's information	down menus to assign the sele 1 that you wish to include.	cted contacts to their appropriate transaction	n roles, and	to select the
Name	Transaction Role	Email Address		Action
Al Gorithem	Seller Party 1 🂙	kaz@yourparadisehome.com	~	Remove
Olga Rithem	Seller Party 2 🂙	kaz@yourparadisehome.com	\sim	Remove
Kaz Cisowski	Seller Broker 💙	kazc@floridarealtors.org	\sim	Remove
Kaz Cisowski	Seller Agent 🎔	kazc@floridarealtors.org	\sim	Remove
				Add Contacts

9. You will then see a pop-up window 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. Once you completed entering the required Service Providers, click on the "**Save Service Provider Information**" button on the bottom right.

Seller Information Add from Contacts Add additional Seller Parties	Service Providers Information Add from Contacts Add from Contacts
Seller Names Populate from Party Names Al Gorithem & Olga Rithem	Expand all/collapse all
Seller Party 1 ^	Escrow Company Name SIMPLICITY TITLE Escrow Company Address
Party 1 Puil Address 6986 Heartland Cir Tallahassee, FL 32312 Party 1 ID Party 1 Email xxx-xx-0000 kaz@vourparadisehome.com	1234 MAIN STREET, ORLANDO FL 32982 Escrow Agent Escrow Email Address JUSTIN CASE justin@justincase.com
Party 1 Home Party 1 Work Party 1 Cell Party 1 Fax (305) 345-4357 000-000-0000 000-0000 000-0000	Phone Fax Escrow Company Represents 407-234-1234 000-000-0000 the Seller
Seller Party 2 ~	Title Company ~
Seller Brokerage	Title Company 2

- 10. After clicking on the "**Save Seller (or Buyer) Information**" button on the bottom right, the *Add to Contacts* pop-up window will appear with the option to save new transaction participants to their Form Simplicity Contacts page, <u>AND</u> the option to update Contact records if the contact information was updated in the transaction.
 - **Update Contact:** If the participant already exists in the Contact record and a change or update to the information is detected, the user will have the option to Update Contact (default) or Add New Contact.
 - Any field where a change has been detected will be displayed as a select drop-down that displays the update from the transaction and the original information from the contact record. This will show users what is being changed and allow them the option if they want it updated or to remain the same.
 - **New Contact:** If the participant is not detected in the user's Contacts, then the user can choose to save that participant as a new contact.
 - Form Simplicity will check against the following Contact fields:
 - 1. Home Email
 - 2. Home Phone
 - 3. Work Phone
 - 4. Cell Phone
 - 5. Fax
 - Addresses: The Transaction Participants section stores addresses as a full address while the Contacts store addresses separated by each component (Street, City, State, Zip). To parse the addresses so it properly saves to the contact record, the address is sent to USPS webservice and parsed IF VALID. If it is not a valid address, the whole address will be place in the Street Address field and the user can edit it manually.

Add to Contacts			×
We noticed that these transa would like to create/update a for each participant, include .ast Name and at least 1 ema	ction participants are not as and save new contacts using any additional details, and c ail address or 1 phone or fax	sociated with people in your of these transaction participant lick the 'Save Contacts' butto number.	Contacts or they are being updated. If you s, please verify the populated information n. Each record must contain a First Name,
Update Contact First Name *	Add New Contact Last Name * Manderin	Home Email kaz@yourparadisehome	Work Email
Street Address	City		State Zip
Home Phone Work P 4075343452	hone Cell Phone (239) 561-2311	Home Fax Work I	Fax Group Select Group 🗸
☑ Update Contact First Name *	Add New Contact	Home Email	Work Email
Penny	Larcenie	kaz@yourparadisehome	Save (2) Contacts

11. All the **Seller Parties** or **Buyer Parties** as well as the **Service Providers i**nformation will appear in the *Transaction Participants* section of the Transaction Details Page.

C Transa	C Transaction Participants										
Add Selle	Add Seller Parties Add Service Providers										
Seller Nan	Seller Names: Marshall Law & Marsha Mello										
\bigcirc	Marshall Law Seller Party1 kaz@yourparadisehome.com										
\bigcirc	Marsha Mello Seller Party2	520 Island Dr Palm Beach, FL 33480	kaz@yourparadisehome.com	(305) 675-1234							
\bigcirc	Kaz Cisowski Seller Agent			kazc@floridarealtors.org	(407) 587-1356						
Buyer Nan	nes: &										
Include the	buying agent, broker and the	eir brokerage, along with the buyers, in your t	ransaction by clicking Add E	Buyer Parties.							
Service Pr	Service Providers										
	Blanc Bankers Lending Company	1234 W Main St Orlando FL 32813	Drew A Blanc	kaz@yourparadisehome.com							
	Otter Appraisals Appraisal Company	999 W Orlando Blvd Orlando FL 32822	Barry Ott	kaz@yourparadisehome.com							

Notes: _____

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. Click on the transaction to open.

Но	me	Transactions	Blank Forms	My Files	Contacts		Templat	es
My Transa	actions (188)	Shared Transactions	Archived Transactions Task	s eSign Sessions				
Sort: Last U	pdated (Descen	ding) 🗸	Select Filters 0	View: 📰 👭	Search My Trans	actions	Q	? 🗈
Sta	rt a New Transacti	on						
12	Name		Address	Last Updated	Туре	Status		
	123 N Simple 32757	e Street Pleasantville FL	123 N Simple Street Pleasantville 32757	2 FL 07.06.22	Residential Listing	New	Settings	Ľ

2. 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.*

🗟 Broker Review						^
Add Review Checklist						
Checklist Name	Checklist Type	Status	Date Created	Date Submitted	Last Updated	

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

×
Add Review Checklist
Review Name
Al Gorithem and Olga Rithem
Review Type *
Residential Listing Checklist 🛛 🗸 🗸
Add Checklist

4. In the *Broker Review* section, 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	1					
Name 123N SIMPLE STREET	Type Residential Listing Checklist	Status Unsubmitted	Date Created 27-MAY-22	Date Sub	Example 27-MAY-22	
Document Checklist						
Send Email D	ownload					
Name			Status	File		
Listing Agreement -	Transaction Broker		Required	\Box	Click to add file]
Seller Property Disc	osure Form		Required	∇	Click to add file	1
MLS Printout			Required	\Box	Click to add file	
Lead Based Paint Di	Lead Based Paint Disclosure		If Applicable	∇	Click to add file	
HOA Disclosure	HOA Disclosure		If Applicable	₽	Click to add file	
Add additional Cheo	klist Item				(Submit Delete

5. The **"Add additional Checklist Item"** button below 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 **"Use file name."** You can leave a note regarding this checklist item for your broker. After selecting the file(s), click the **"Add file to checklist item"** button. *Note: Additional checklist items can be retrieved from your devices, from Dropbox or Google Drive.*

Add Additional Checklist Item	
Checklist Item Name * 🗹 Use file name	File Search Q
New Listing Checklist	Search Transaction Files
This document is included with the file Select checklist item	e I added to the following checklist item \checkmark
New Listing Checklist.pdf	10.14.22
File not in your transaction? Add it direct	ly from one of the following locations:
🖹 My local device 🐺 Dr	opbox 🛆 Google Drive
Notes	
	ĥ
	Add checklist item

- 6. After the files have been attached to the items in the *Document Checklist* section, those items will show an **"Added"** status.
 - a. Each item will contain a list of options:
 - i. The **"magnifying glass"** opens the *File Preview* pop-up window allowing agents to review a file or view all files from a PDF File module that displays the submitted files and provides a space to leave notes. The review options will allow the broker to complete the process without having to close the file preview module once it opened.
 - ii. The **"note bubble**" opens the *Checklist Item Notes* pop-up window allowing agents to write a note to your broker.
 - iii. The **"replace document"** opens the *Replace File* pop-up window allowing agents to replace incomplete checklist documents.
 - iv. The **"x"** opens the *Delete File* pop-up window allowing agents 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.*

Send Email Download						
Name	Status	Q	Viev	v All	File	
Listing Agreement - Transaction Broker	Added	Q	∇	ß	×	Exclusive Right of Sale Listing Agreement, Transaction Broker.pdf
Seller Property Disclosure Form	Added	Q	\Box	ß	×	Sellers Property Disclosure - Residential.pdf
MLS Printout	Added	Q	∇	ß	×	SEF-RE1 Data Input Form.pdf
Lead Based Paint Disclosure	If Applicable	∇				Click to add file
HOA Disclosure	If Applicable	∇				Click to add file
New Listing Checklist	Added	Q	\Box	Ð	×	New Listing Checklist.pdf

Notes: ____

Transactions: History

Track the History of your Form Simplicity Transaction showing the date and time stamp of the activity taken by a team member in the brokerage.

1. Log in and either from the Form Simplicity home screen or click on **"My Transactions"** from the *Transactions* main navigation menu, click on the transaction you wish to see the history on.

Home	Transactions	Blank Forms		My Files	Contacts		Template	25
My Transactions (151)	Shared Transactions	Archived Transactions	Tasks	eSign Sessions				
Sort: Last Updated (Descer	nding) 🗸	Select Filters 0	v	iew: 📰 💵	Search My Transacti	ons	Q	? 🖻
Start a New Transaction Create and Manage Teams Archive Delete								
Name		Address		Last Updated	Type Stat	us		
123 N Sin FL 32757	mple Street Pleasantville 7	123 N Simple Street Pleasan FL 32757	itville	12.05.23	Residential Purchase Nev	v 🗸 (Settings	«С

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

D 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

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.
- 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* header or click on the "Print" button on the *Primary Action Sidebar* located on the left margin in the transaction details page.

HIDE Collapse	Forms and Files	eSign Print	Email Fax Merge Copy to Transaction	n Download Delete
eSign	Forms			^
Print	Add Blank Forms Add Forms Package Copy to Files			
Email	☑ Title 🗢		Form 🗢	Date 🗢
	🚔 🗹 Exclusive Right of Sale Listing Agreement, Transact	tion Broker	ERS-18tb.xdp	10.14.22
Fax	📫 🗹 Sellers Property Disclosure - Residential		SPDR-3.xdp	10.14.22
Merge				
Download	E Files			^
Copy To Transaction	New File Folder Upload Files Fax Back Cover Page	Move to folder	File Storage: 1 mb of 93 mb used space	Unlimited
Сору То	□ Name \$	Description 🗢	Date 🗢	Size 🗢
Delete	e New Listing Checklist.pdf		11.22.22 / 02:20 PM	.05 MB

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

Print
Each copy will have a unique serial number
Print

4. A PDF viewer will open showing the form(s) and/or file(s) to print. The *Print* dialog pop-up window automatically appear. Choose the *Printer Destination, Pages to print, how many Copies*, and any additional settings. Click on the "**Print**" button to proceed. Click on the "**Cancel**" button to discontinue.

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 by hand.

- 1. Log in and open the transaction.
- 2. Select the form(s) and/or file(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* header or click on the **"Email"** button on the *Primary Action Sidebar* located on the left margin in the transaction details page.

HIDE	Forms and Files	eSign Print Email Fax	Merge Copy to Transaction	Download Delete
eSign	Forms			^
Print	Add Blank Forms Add Forms Package Copy to Files			
Email	🖸 Title 🗢		Form 🗢	Date 🖨
	🚔 🗹 Exclusive Right of Sale Listing Agreement, Transaction	Broker	ERS-18tb.xdp	10.14.22
Fax	🚔 🗹 Sellers Property Disclosure - Residential		SPDR-3.xdp	10.14.22
Merge				
Download	🖹 Files			^
Copy To Transaction	New File Folder Upload Files Fax Back Cover Page Mo	ve to folder File Storage:	1 mb of 93 mb used space	Unlimited
Сору То	□ Name 🗢	Description	Date 🗢	Size 🗢
E Files	➡ □ New Listing Checklist.pdf		11.22.22 / 02:20 PM	.05 MB
× Delete				

3. Enter the recipient's email address is the "**To**" box, type your "**Subject**" and "**Message**", and attach an email template, if necessary, then click "**EMAIL**" to confirm the action or "**X**" to cancel it. A Form Simplicity confirmation message "*Email Sent*!" will appear below the main navigation menu.

Email	×
Io	
fitechtrainer@gmail.com <0lga Rithem> ×	
	1
Email Template	
	~
Subject*	
Listing Package	
Message	_
♠ Arial - 12pt - B I U A.	- <u>A</u> -
Please find attached the forms for you to review. To send me flies, simply send them as attachments to fs+123nsimplestreet_11056285@formsimplicity.com	
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	
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	
	Full Address 123 SIMPLE ST, PLEASA	NTVILLE FL 32933
	Transaction Status Active ❤	MLS Listing ID Enter MLS ID
123 SIMPLE ST, PLEASANTVILLE FL 32933		

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" button to email the file to the transaction.

	From 🔻	fltechtrainer@gmail.com		
\triangleright	То	fs+206manthavecocoafl 8175@formsimplicity.com		
Send	Cc			
	Bcc			
	Subject	Additional Items		
	Attached	New Listing Checklist.pdf 121 KB		
Attached is another item you need to review.				

4. The attached file that was emailed will appear under the *Files* section of the transaction. The complete Email with attached file will appear in the Email History section of the transaction.

Files						^
Upload Files Fi	ax Back Cover Page	File Stora	ge: 1 mb of 75 mb	used space Unlimited	d	
□ Sort	Title	Description		Date	Size	
	New Listing Checklist.pdf	New Listing Chec	klist	10.12.20 / 11:51 AM	.06 mb	
C Transaction Pa	articipants					~
🗎 Tasks						~
eSign Sessions	5					~
Collaboration						~
e Email History						^
From	То		Subject	Date/Time	View All	
Kaz Cisowski	"fs+123nsimplest_5558091@formsimplicity.com	ו"	No Subject	10.12.20 / 11:51 AM	View	
🕑 History						~

- 5. To view the email message(s) in the *Email History* section, click on "View" or "View All."
- 6. In the *Email Preview* window, click "**Print**" to print the email message. Click on "**Attachments**" to view, print, or download the attached file(s) or click on the "**X**" to cancel the action.

Email Preview
Print
From: Kaz Cisowski To: "fs+123nsimplest_5558091@formsimplicity.com" Date / Time: 10.12.20 / 11:51 AM Subject: No Subject Attachments <mark>Attachments</mark>
Sincerely, Kaz Cisowski Technology Training Manager FloridaRealtors(r) 7025 Augusta National Drive, Orlando, FL 32822 talk: 407.438.1400, ext. 2746 fax: 407.438.1411 visit: http://www.floridarealtors.org Click link to learn more about: Legal Hotline Tech Helpline Form Simplici SunStats News Magazine Advocacy Online Ed Facebook: http://floridarealtors.org/tacebook Twitter: http://floridarealtors.org/twitter The Voice for Real Estate(r) in Florida

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) and/or file(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 or click on the "Fax" button on the Primary Action Sidebar located on the left margin in the transaction details page. This will allow you to fax directly to a fax machine.



3. Enter the Fax recipient name, Fax number, and enter a message (500 character limit) and click on the **"Send Fax"** button to send or **"X"** to cancel.

Fax X
Fax recipient name
Drew A Blanc
Fax numbe 407-999-9999
Message
Please find enclosed the Listing Agreement and the Sellers Property Disclosure Form for you to review and sign.
(500 character limit) Send Fax

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 the "Fax Back Cover Page" button or click on the "Fax Back Cover Page" button on the *Primary Action Sidebar* located on the left margin in the transaction details page.

•	Collapse	ᆍ 🕕 Sem	ers Property Disclosure - Residential		SPUR-3.Xap	12.27.21	
	Add Blank Forms	Files					^
瞫	Add Forms Packages	New File Folder	Upload Files Fax Back Cover Page	Move to folder	File Storage: 1 mb of 134 mb used space	Unlimited	
Vt	New File	D	Name 🗢	Description 🗢	Date 🗢	Size €	
	Unload	≑ □	New Listing Checklist.pdf		05.27.22 / 01:54 PM	.05 MB	
Ĺ	Files						
#	Fax-back Cover Page	C Transaction	Participants				~

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.

Fax-back Cover Page
Faxing documents into a transaction requires the fax-back cover page included as the first page of the fax. Choose a method below to obtain or send a copy of the fax back cover page for this transaction.
Download
Download
Send via Fax
Fax Number * Enter the fax number startin
Send Fax
Send via Email
10 ⁻
Subject *
Enter subject line
4
Send Email

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



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

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

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

- 1. Log in and open the transaction.
- Select the form(s) and/or file(s) that you would like to delete by placing a check mark on the boxes next to them. Click on the red "Delete" located to the right of the *Forms and Files* title or click on the "Delete" button on the *Primary Action Sidebar* located on the left margin in the transaction details page.

	Forms and Files	Merge Copy to Transaction	i Download Delete
eSign	Forms		^
Print	Add Blank Forms Add Forms Package Copy to Files		
	☑ Title 🕏	Form 🖨	Date 🗢
Email	🚔 🛛 Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-18tb.xdp	10.14.22
Fax	🚔 🛛 Sellers Property Disclosure - Residential	SPDR-3.xdp	10.14.22
Merge			
Download	Piles		^
Copy To Transaction	New File Folder Upload Files Fax Back Cover Page Move to folder File Storage	1 mb of 93 mb used space	Unlimited
Сору То	□ Name ♦ Description ♦	Date 🗢	Size 🗢
Files	🚔 🗆 New Listing Checklist.pdf	11.22.22 / 02:20 PM	.05 MB

3. A *Delete* pop-up window 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. A Form Simplicity confirmation message **"(NN) record(s) deleted!"** will appear below the main navigation menu.



Transactions: Copy to Transaction

The **Copy to Transaction** command allows the user to copy the form(s) and/or file(s) to a new transaction instead of creating a transaction from scratch.

- 1. Log in and open the transaction.
- 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 or click on the "Copy to Transaction" button on the *Primary Action Sidebar* located on the left margin in the transaction details page.

	Forms and Files	Merge Copy to Transaction Dow	nload Delete
esian	Forms		^
P/ esign	Add Blank Forms Add Forms Package Copy to Files		
	☑ Title 🗢	Form 🗢 🛛	Date 🗢
Email	🚔 🛛 Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-18tb.xdp 1	0.14.22
Fax	🚔 🛛 Sellers Property Disclosure - Residential	SPDR-3.xdp 1	0.14.22
Merge			
Download	Files		^
Copy To Transaction	New File Folder Upload Files Fax Back Cover Page Move to folder File Storage	e: 1 mb of 93 mb used space Unlin	iited
Сору То	□ Name ♦ Description ♦	Date 🗢	Size ♦
Delete	Listing Checklist.pdf	11.22.22 / 02:20 PM	.05 MB
X			

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. A Form Simplicity confirmation message *"Forms and Files successfully copied to the transaction.*" will appear below the main navigation menu.

X Copy to Transaction	
New Transaction *	
123 Main St, Anywhere FL 34567	
Street Address *	
123 Main St, Anywhere FL 34567	
Property Type	
Residential \checkmark	
Transaction Type	
Listing 🗸 🗸	
Copy to Transaction	

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

Transactions: Download

The **Download** command allows you to download certain form(s) and/or files. The entire transaction can be exported to your computer.

- 1. Log in and open the transaction.
- Select the form(s) and/or 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 or click on the "Download" button on the *Primary Action Sidebar* located on the left margin in the transaction details page.

HIC	Collapse	Forms and Files	eSign Print	Email Fax Merge Copy to Transaction	Download Delete		
	a Sian	Forms		^			
	Print	Add Blank Forms Add Forms Package Copy to Files					
E	J Empil	☑ Title 🗢		Form 🖨	Date 🗢		
		➡ Exclusive Right of Sale Listing Agreement, Transact	ion Broker	ERS-18tb.xdp	10.14.22		
	Fax	🔹 🛛 Sellers Property Disclosure - Residential		SPDR-3.xdp	10.14.22		
	Merge						
E	Download	Files			^		
Ę	Copy To Transaction	New File Folder Upload Files Fax Back Cover Page	Move to folder	File Storage: 1 mb of 93 mb used space	Unlimited		
(Copy To	□ Name 🗢	Description \Leftrightarrow	Date 🗢	Size ⇔		
		♣ □ New Listing Checklist.pdf		11.22.22 / 02:20 PM	.05 MB		
×	Delete						

3. By clicking the **"Download"** button, Forms are downloaded (as a PDF) and Files will be added to either their local device and/or to a custom Form Simplicity folder that is generated in the user's Dropbox account or Google Drive and further organized within sub-folders depending on where the files were downloaded from. Click on **"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	×
Locations	
 My local device Dropbox Google Drive 	
Options	
✓ Download as a .ZIP file ✓ Disable editing (Forms on	ly)
D	ownload

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

Home	<u>Transactions</u>	Blank Forms	My Files	Contacts	Templates
My Transactions (151)	Shared Transactions	Archived Transactions	Fasks eSign Sessions		
Sort: Last Updated (Desc	Sort: Last Updated (Descending) View: E H Search My Transactions Q				Q ? D
Start a New Transaction Create and Manage Teams Archive Delete					
Name		Address	Last Updated	Type Status	
123 N S FL 327	Simple Street Pleasantville 57	123 N Simple Street Pleasant FL 32757	tville 12.05.23	Residential Purchase New 💙	Settings

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.

 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. Click on "eSign" located to the right of the *Forms and Files* title or click on the "eSign" button on the *Select-command action sidebar* located on the left margin in the transaction details page.

	Forms and Files	Merge Copy to Transaction	Download Delete
eSign	Forms		^
Print	Add Blank Forms Add Forms Package Copy to Files		
Email	✓ Title ⇒	Form €	Date 🗢
	🚔 🛛 Exclusive Right of Sale Listing Agreement, Transaction Broker	ERS-18tb.xdp	10.14.22
Fax	🚔 🛛 Sellers Property Disclosure - Residential	SPDR-3.xdp	10.14.22
Merge			
Download	🖹 Files		^
Copy To Transaction	New File Folder Upload Files Fax Back Cover Page Move to folder File Storage:	1 mb of 93 mb used space	Unlimited
Сору То	□ Name ♦ Description ♦	Date 🗢	Size €
Files	➡ □ New Listing Checklist.pdf	11.22.22 / 02:20 PM	.05 MB
3. In the *eSign* pop-up window, select signers who will be participating in the eSign session by placing a check mark in the box next to their names. Click and drag the sort handlers next to the signers to sort the signers. Then, click on the "**Create new eSign 2.0 session**" button.

				X
eSign				
Select s	igners (optional)		
Select fr default	rom the eSign se	people below to include in ssion settings and custom	this eSign session and set th templates in your Preference	ne order in which they appear. You can manage your es page under eSign Preferences & Templates.
		Party	Name	Email Address
≑		Seller Party1	Justin Case	kaz@yourparadisehome.com
ŧ		Seller Party2	Vera Cruz	kaz@yourparadisehome.com
≑		Seller Agent	Al Gorithem	fltechtrainer@gmail.com
1.5		CC - Recipient	Kaz Cisowski	kaz@kaz1.net
				Create new eSign 2.0 session Use DocuSign

Notes: _____

Step 1 – Signing Session Configuration

Designate Signers

1. Because the forms from the Form Simplicity Library are programmed to preassign signers, the *Designate Signers* window will appear. Here you will choose the correct signer participant for the correct signer role. (i.e. Apply the Buyer's name in the Buyer field, apply the Seller's name in the Seller's field). You can also add a signer here. The click on the **"Add Signer"** button. Click on the **"Next"** button when all the fields have been assigned.

Designate Signe	rs		×
음 First Name	음 Last Name	🖾 Email	Add Signer
Assign Signer	Roles		
Seller 1	Justin Case	~	
Seller 2	Vera Cruz	~	
Seller's Agent	Al Gorithem	~	
Seller's Broker	Select a Signer	~	
			Close

2. If a signer role has not been assigned, then the *Assign Signer* pop-up window will appear. By clicking on the **"Yes"** button, all the signing locations where the unassigned signer role(s) should sign will be removed.



Title & Message

The eSign session automatically includes a **Transaction Name**.

A **Session Title** is required. This can be the name of the documents you are signing or anything specific that can help you organize your workflow.

Senders can include a personalized email message which will be included in the email invite.

Enable Reminders as needed. Email reminders can be sent to signers on a regular basis from once a day to once every 30 days, until they complete their signing session.

Set an expiration date if needed. When a signing session expires the session will not be available to signers. The session will show as cancelled.

Home / Sessions / Draft			
		Cancel	Next →
Title and Message			
123 N Simple Street, Pleasantville, FL 32757	Options		1
Seller Package: 123 N Simple Street, Pleasantville, FL 32757	Set Reminders		
Normal · if· <u>A</u> · B / 以注 III ね パ 通 E E E E E チー や	Reminder Frequency (Days)	Day(s) 🗸	
Kaz Cisowski	Session Expiration	Ē	
Technology Training Manager FloridaRealtors® 7025 Augusta National Drive, Orlando, FL 32822 talk. 407 #33 1400, ext. 2746			
fax: 407.438.1411 visit: http://www.floridarealtors.org			
L			
Notes			

Recipients

- 1. Senders have the option to set the order of who should sign first, second and so forth using the *Recipient Ordering* toggle function.
 - When *Recipient Ordering* is enabled, recipients will receive their signing session invite emails in sequential order, only after the previous person has completed their signing session. Use the numbers dropdown to the left of the recipient's name to set the signing order.

Note: Another method of setting the signing order is to take your mouse and hover over a signer participant. The mouse pointer changes to a Four Headed Arrow Mouse Pointer allowing you to change the signing order.

• If *Recipient Ordering* is disabled, all recipients will receive their session invite emails simultaneously.

Recipient O	Indering	Include me as a Signer		
Order	Name	Email	Status	Role
1 -	Richard Newton	eSignSupport@realestatedigital.com	Pending Invite	Signer
2~	Prabakar Mahalingham	prabakar@showcase.com	Pending Invite	Reviewer
3.4	Peggy Newton	eSignSupport@realestatedigital.com	Pending Invite	Signer
4 4	John Smith	alison.garcia@realestatedigital.com	Pending Invite	CC-Recipient

2. *Include Me as a Signer* – The sender can also add themselves as a signer to the signing session. When enabled, the sender will automatically be added as a signer to the session.

When the signing session is sent and depending on the signing order, the sender may be asked if they would like to sign now or later.

ecipients					
Recipient Ordering	67)	Include me as a Signer	(115 O)		
Drder	Name	Email	Status	Role	
1.	Prabakar Mahalingham	prabakar@showcase.com	Pending Invite	Signer	

3. *Show Signing Groups* – A Signing group consists of multiple individual signers. Once the first person within signing group has signed, it eliminates the need for the other individuals within that signing group to sign as well. The session will complete if they were the last in the sequence, or it may progress to the next signer (or signing group) in the order.

Signing groups allow any one person who is part of a group to sign on behalf of the group. Enable this option to show the Signing Groups column.

In the signing groups column, enter the name of the group. The group name must be an exact match for the system to include everyone on the group.

Recipient Ordering	NO	Include me as a Signer	NO	(1) Show signing groups	S YES	
ecipient Sequence	Name	Email	Status	Signing Group	Туре	Actions
1 ~	Justin Case	kaz@yourparadisehome.com	Pending Invite	Signing Group	Signer +	
1 ~	Vera Cruz	kaz@yourparadisehome.com	Pending Invite	Signing Group	Signer •	•••
1 ~	Al Gorithem	fltechtrainer@gmail.com	Pending Invite	Signing Group	Signer +	

- 4. The sender can add multiple recipients to the session. There are three recipient roles and can be summarized as:
 - **Signer** A signer must sign, initial, date or add additional information to the document as needed to complete their signing session
 - **Reviewer** A reviewer can view the session documents but does not have any signer tags.
 - **CC Recipient** A CC Recipient receives a copy of the completed documents once the session has completed.
- 5. Add the information of all your signers To add recipients, the sender can search for contacts that have previously been added to the system. Entering a portion of the recipient's name or email address will display filtered results in the auto suggest box. Click on the person(s) who should be included in the signing session. Senders can also use the *Address Book* button or click on the "+Add New Recipient" text.

Recipients			
Recipient Ordering	() HED	Include me as a Signer	
Order	Name	Email	Status
		No da	ata ava <mark>ilable ir</mark>
to add new recipient typ	e 3 or more characters		- 🗵
Rich			-
Richard Newton #SignSupport@reelectatedigita	i.com		
	+ Add New Re	reichent	

 +Add New Recipient – New signers can be added when the signing session is created. Click the "+Add New Recipient" text in the recipient search box. A pop-up screen will open.

Add Recipient	×
Contact Information	
First Name	Last Name
Email	Authentication
Actions	~
Allow Delegation No Signing in-person Include Attachments No Document Review	NO Disable Edit Name NO NO NO NO NO
Notes	~
Address and Phone	^
	Cancel Save

At a minimum, enter the recipient's First name, Last name, and Email address. Click the **"Save"** button to add them to the session. They will also be saved as a contact and available for future signing sessions.

7. Under the *Actions* column, click on the ellipsis to either **"Edit"** the recipient's record while in the eSign session or to **"Delete"** the recipient from the eSign session.



- 8. **Authentication** The sender can add additional authentication methods per signer. The available authentication methods include:
 - **PIN** Assign a unique pin to access the signing ceremony.
 - **SMS** Sends signers a one-time unique password codes via text message. Standard text message rates apply.
 - **KBA (Knowledge Base Authentication)** This type of authentication is an identity validation method to authenticate a signer by asking random questions selected from public and commercial information related exclusively to the signer. KBA is \$1/signer.

Add Recipient			×
Contact Information			
Justin	Case		
kaz@yourparadisehome.com	Authenticat	ion	
	PIN	Minimum 4 numbers required	1
Actions		Enter Phone Number	í
Allow Delegation Signing in-person	🗌 КВА	I agree to a \$1.00/signer fee	í
Include Attachments Document Review	OND	,	
Notes			~
Address and Phone			^
		Cance	Save

Notes: _____

- 9. Each recipient can also have personalized signer options. Signer options can be summarized as:
- Allow Delegation Allows signers to delegate to another person
- **Signing in-person** Allows signers to sign their session in person with the sender present
- **Disable Edit Name** Doesn't allow the signer to edit their name during the signing ceremony
- Include Attachments Sends completed documents as an email attachment
- Document Review Requires the signer to scroll through all documents before prompted to sign
- **Signer Notes** Personalize the session subject and/or email message which will be added to the default subject and email message

Add Recipient	E
Contact Information	
Justin	Case
kaz@yourparadisehome.com	Authentication
Actions	\sim
Allow Delegation No Signing in-person Include Attachments No Document Review	Disable Edit Name
Notes	\sim
Subject	
Message	
Address and Phone	~
	Cancel

Documents

 To upload documents from your device, click on the "Upload" link. To upload documents from your cloud storage such as OneDrive, Dropbox, or Box.com, click on the "Get from Cloud" link. You can also Drag and Drop your files. The supported file types include PDF, Word, Excel, PNG and HTML. Note: Once the Word, Excel, PNG and HTML file types are uploaded, the documents will be immediately converted to PDF files. The uploaded documents must not exceed 25MB and total session documents must not exceed the limit of 50MB.

In the *Actions* menu next to each document is an ellipsis.

Docume	nts				
		Drag Files Here, Upload, Get from Cloud			
Order	Document Name	Template	Pages	Size	Actions
1 🕶	${\sf ExclusiveRightofSaleListingAgreementTransactionBroker.pdf}$	Exclusive Right of Sale Listing Agreement, Transaction Broker	4	112kb	
2 -	New Listing Checklist.pdf		3	Rename	
				Delete	
				Clear Template	
				Apply Template	

2. Click on the ellipsis on the *Actions* column, to open the eSign template menu.



• The *Rename* button give the document a different name.

Rename Docum	ent		×
New Name			
		Cancel	onfirm

• The *Delete* button removes the document from the signing session.



• The *Clear Template* removes any template that may exist on the document.

Notes: ______

3. Templates can be assigned manually on this step by selecting the "**Apply Template**" option under the *Actions* menu. *Note: An eSign template needs to be created first in Templates <i>located in the eSign Preferences and Templates section under My Preferences.* Select the appropriate template to apply and on the "**Next**" button.

Apply Template			×
User Templates	Search by Title or Description	n	Q
System Templates	Title	Description	Signers
	 Form Simplicity New Listing Checklist 	Used for Residential Listing Transactions	
			Close Next

4. Then assign the signer's role on the *Apply Template* pop-up window. Click on the **"Next"** button.

Apply Template			×
8 First Name	😤 Last Name	🖾 Email	Add Signer
Assign Signer	Roles		
Seller 1	Justin Case	~	
Seller 2	Vera Cruz		
Seller's Agent	Al Gorithem		
-			Close Next

5. Once Step 1 is complete, the sender can click the **"Next"** button to proceed to the Step 2.

Home / Sessions / Draft	4	Cancel Next >
Title and Message		

Step 2 – Add Signer Locations

Forms that have received the pre-assigned template in the *Documents* section, those forms will auto-populate the name of the person responsible for filling out the fields right away. This step allows the sender to tag the uploaded documents for signer tags and markup the document if necessary.

Signer Tags

Signer tags are items where the signer may need to add their signature, initials or supply additional information.

From the left rail, senders can select *Signature, Initials, Date/Time, Form Field, Dropdowns, Checkbox* and *Radio Buttons* from the list of options to be added to the document. Select the appropriate option and <u>drag and drop</u> to the areas on the document that need to be addressed by the signer. The sender can toggle between signers by selecting the signer dropdown menu. All signers must have at least one signer tag assigned to them.

Home / Sessions / Draft		
← Back	Justin Case	Q
Signer Tags: -	Vera Cruz Outrin Case Date: Immv/dd/yyyyy Work Telephone: Facsimile:	•
Signature <u>[</u> Initials	Al Gorithem	
Date/Time	185* Home Telephone:	
Form Field	187* Email Address: kaz@yourparadisehome.com 188* Authorized Sales Associate or Broker: Date: Date: 188* Berlessee Simplicity Real Estate Services Talephanese	
© Drop Down	190* Address:	
Check	191* Copy returned to Seller on by email facsimile mail personal delivery. Forda REALTORS' makes no representation as to the legal validly or adequacy of any provision of this form in any specific transaction. This standardized form should not be used in compare transactions or with edensive rides or additors. This form is available for use by the enter real estate industry and is not infranded to identify the users REALTOR's REALTOR's and who subscribe to its Code of this. The copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yair mains including factomile cardinal factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yair mains including factomile cardinal factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yairs including factomile cardinal factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yairs including factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yairs including factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yairs including factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yairs including factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yairs including factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yairs including factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized reproduction of this form yairs including factomile copyright laws of United States (17 U.S. Code) forbid the unauthorized form yairs including factomile copyright laws of United States (17 U.S. Code) forbi	
	Seller IVC /Sales Associate () IAG ge receipt of a copy of this page, which is Page 4 of 4.	

Files that did not have the preassigned option, (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 signer drop-down menu, then click the action they should take and drag and 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.*

Markups

Senders can use markups to modify the document using the same drag & drop function. Click on **"Markups"** below the *Signer Tags* section in the left rail.

Markup fields can be summarized as:

Add Text: A text box can be placed were needed for the sender to add text to the document. **Strike thru:** A red line can be placed over the document.

Underline: A blue line can be placed under the desired text.

Highlight: Yellow overlay can be placed over the selected text.

Checkmark: A blue checkmark allows the sender to select an item on the document.

Some markups are adjustable or editable.

Home / Sessions / Draft	Ç≱	
← Back	O Justin Case ▼	Q
Signer Tags: + Markups: - T Add Text Strikethru Underline Highlight	162 Agreement is the entire agreement between Seller and Broker. No prior or present agreements or representation 163 will be binding on Seller or Broker unless included in this Agreement. Electronic signatures are acceptable and 164 will be binding. Signatures, initials, and modifications communicated by facsimile will be considered as originals. 165 The term "buyer" as used in this Agreement includes buyers, tenants, exchangors, optionees, and other categorie 166 of potential or actual transferees. 167 14. Additional Terms: 168 Enter text 169	
Checkmark	177178179179179179179170170170170170170170170170170170170170170170170170170170170170170170170170170170	

When the documents have all the necessary signer tags and markups, the sender can either **"Preview" (eye)** the session and the documents or **"Send" (paper airplane)** the session to the recipients.

Step 3 – Preview and Start Signing Session

Clicking on the **"Preview"** button is optional, allowing the sender to preview their session under one view. This gives you the opportunity to review your forms as the recipients see it and to click on the **"Back"** button to go back to the previous step to make changes to the session if needed. Otherwise, click on the **"Send"** button to send the eSign session to your clients.

This page is divided into four sections: *Signing Session Information, Documents, Recipients, and a preview of the Signer Tags and Markups*. Once the session preview is completed for accuracy, the sender can select to send the session.

Home / Sessions	/ Draft					
← Back	<u>Justin Case</u>	•	1/5		Q 100% €	
Signing Session	n Information					
Transation	122 N Circula Charact Discount illing Fi	Created Data	2/20/2022 0.57.00 AM EDT	Otation	5.0	
Name:	32757	Created Date:	3/28/2022 8:57:06 AM EDT	Status:	Draft	
Session Title:	123 N Simple Street, Pleasantville, FL 32757	Expiration Date:	3/28/2022 9:27:41 PM EDT	Reminders: Certificate:	Off	
Email Message:	Click to view					

Docume	onts			
Order	Document Name	Template	Pages	Size
1 ~ 2 ~	ExclusiveRightofSaleListingAgreementTransactionBroker.pdf New Listing Checklist.pdf	Exclusive Right of Sale Listing Agreement, Transaction Broker New Listing Checklist	4 3	112kb 15kb

Recipients	3	ĥ			
Order	First Name	Last Name	Email Address	Authentication	Status
1 ~	Justin	Case	kaz@yourparadisehome.com		Pending Invite
2 ~	Vera	Cruz	kaz@yourparadisehome.com		Pending Invite
3 ~	AL	Gorithem	fltechtrainer@gmail.com		Pending Invite

eSign From Your Client's Perspective

1. When a signing session is sent, the recipients will receive an email inviting them to sign. The email will contain a link to **"Review & Sign"**. By clicking on the **"Review & Sign"** button, it will grant them access to their signing session.



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

 In the signing session, the signer will have the following options: Decline and Contact Sender. Signers will be prompted to accept the Consumer Disclosure by clicking the *I Agree* check box, then click on the "Start Signing" button to enter the signing session.

Welcome to your eSign Ceremony
Student User 2 has sent you documents to review and sign in the session called <i>Seller Package: 123 N Simple Street, Pleasantville, FL 32757.</i>
After reviewing the pages, click 'Start' to begin signing. Select each of the required fields to apply your signature, initials and/or the date.
Select 'Next' to navigate each location and 'Done' once complete.
Decline agree to the Consumer Disclosure Start Signing

3. The document will include all Signed tags added by the session owner. To begin the signing process, click on the **"Start"** button. In the signing session, the signer has the options to **Upload Documents, Edit their Signature, Decline Singing** or **Contact the Sender**.

Form Simplicity	2	å Upload Document 🛛 🖉 Edit S	Signature 🚫 Decline Signing	c ⊡ Contact Sender
Start →	① 1/4	•		윤 Download
ExclusiveRighto × Pages 4	Exclusive Right of Sale Listing Agreement	Fo	orm	

4. Then use the **"Next"** button to navigate through the tags within the document. Select **"Done"** when all tags have been completed. An email will be sent to the session owner notifying them that the signature session has been completed. The signer can download a copy of their signed document once they have completed their session.

Done 🥝	⑦ 3/4 ④
Sector Sect	195 0 potential of actual statisterees. 197 14. Additional Terms: If Buyer's initial deposit and/or any additional deposits required under the contract are not received by secrow by the time pariod specified in the contract, Buyer will be considered in default, and Seller may exarcise the Seller's remedies in the contract. 198 exarcise the Seller's remedies in the contract. 199 exarcise the Seller's remedies in the contract. 191 Time is of the essence in the payment of these deposits. 192 Time is of the essence in the payment of these deposits. 193 Seller has the option to declare this contract null and void, if any earnest money deposits are not made on time as 194 required by the contract or if Buyer's earnest money check does not clear. 195 Seller's Signature: Marshall Law 196 Seller's Signature: Marshall Law 197 Date: 05/11/2023 198 Home Telephone:

5. When all tags have been completed, click on the **"Done"** button in the top left corner to complete the signing session. The following message will appear confirming that all the required fields have been completed. Click on the **"Yes"** button to complete the signing ceremony.

All required fields have been completed
Would you like to complete your signing ceremony?
Cancel Yes
Congratulations
Your signing session is complete

Note: You will be notified when the session has been completed by all parties.

You will be emailed a signed copy of the document(s).

6. An email will be sent to the agent notifying them that the signature session has been completed. The signer can then download a copy of their signed document.

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.

Home	Transactions	Blank Forms	My Files	Contacts		Templates	
My Transactions (188)	Shared Transactions	Archived Transactions Ta	asks eSign Sessions				
Sort: Last Updated (Descen	ding) 🗸	Select Filters 0	View: 📰 🖶	Search My Transa	ctions	Q	? 🗈
Start a New Transacti	on						
Name		Address	Last Updated	Туре	Status		
123 N Simple Street Pleasantville FL 32757		123 N Simple Street Pleasantv 32757	ille FL 07.06.22	Residential Listing	New	Settings	Ľ

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

Transaction Email: fs+123nsimplestreet_3286@formsim	Archive Transaction			
	Full Address 123 N Simple Street Ple	easantville FL 32757	Property Type Residential V	Transaction Type
	Transaction Status	MLS Listing ID RE12345	Listing Price \$ 350000	Purchase Price \$ 0
123 N SIMPLE STREET, PLEASANTVILLE FL 32933			Show More Data 🗸 Import F	Property Data Save Data

3. The **Archive Transaction** pop-up window will open asking *"Are you sure you want to Archive this transaction?"*. Click on the **"Yes, Archive Transaction"** button to archive the transaction or click on the **"X"** button to cancel the action.

Archive Transaction
Are you sure you would like to Archive this transaction?
Yes, Archive Transaction No

- 4. This will move the transaction to the Archived Transactions for long-term storage.
- 5. Also, depending on what type of transaction is being archived, change the status in the *Transaction Status* drop-down menu to the appropriate status for the transaction being archived.

Transaction Status <u>Active</u> ×				
	Set Status			
	New			
	Active			
	Pending			
	Closed			
	Leased/Rented			
	Expired			
	Withdrawn			

Notes: _____

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* sub-menu at the top of the Form Simplicity home page. Then locate the transaction that you want to make Active again.

н	Home Transactions		E	Blank Forms		My Files			Contacts		
My Transad	ctions	Shared Transactions	Archived Trans	actions (1)	Tasks	Task List	Template	s			
Start	a New Trans	action			Searc	h My Archiv	ed Transa	ctions	Q		? 🖻
Sort: Last Up	dated (Des	cending) 🗸 🗸	Select F	ilters 3						View	
	Name		Addre	SS		Last Upda	ted	Туре	Status		
	123 N SI PLEASAI	MPLE STREET, NTVILLE FL 32933	123 N FL 327	Simple Street F 57	Pleasantville	12.17	.21	Residential Listing	Active	Settings	ଝ
Display 1 Tr	ransaction	8 24 48 per pa	ge								

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

Transaction Email: fs+123simplest_9136@formsimplicity	🖶 Unarchive Transaction 🗎 Delete Transaction			
	Full Address 123 SIMPLE ST, PLEASA	NTVILLE FL 32933	Property Type Set Property Type →	Transaction Type Set Transaction Type ~
123 SIMPLE ST, PLEASANTVILLE FL 32933	Transaction Status Active ❤	MLS Listing ID Enter MLS ID	Listing Price \$ 0	Purchase Price
			Show More Data Y Import Pr	roperty Data Save Data

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.

X Unarchive Transaction	
Are you sure you would like to Unarchive this transaction?	
Yes, Unarchive Transaction No	

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."

Notes: _____

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.

