Master the Paperless Real Estate Transaction (3CE)

A Form Simplicity QuickStart Guide

Contact Information for Form Simplicity Technical Issues:
Call Tech Helpline – (407) 587-1450
Email Tech Helpline – support@TechHelpline.com
Monday through Friday – 9:00 AM to 8:00 PM;
Saturday & Sunday - 9:00 AM to 5:00 PM ET

Download the Tech Helpline App

Revised 1/1/2024

Antitrust Reminder

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

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

WHAT IS A REALTOR®?

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

Florida Realtors® Student Code of Conduct

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

Responsibilities of Students

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

What is Form Simplicity?

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

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

Who owns Form Simplicity?

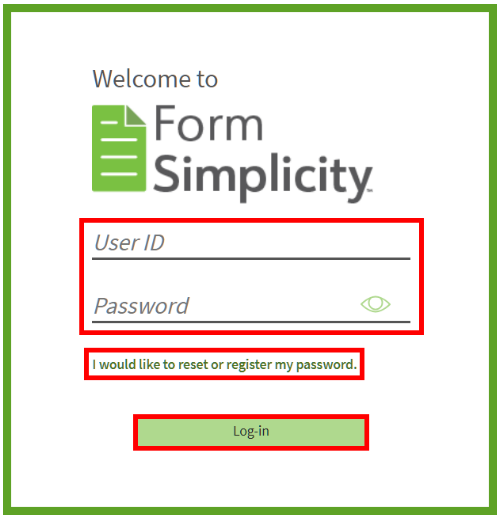
Form Simplicity is created and owned by Florida Realtors®. The Florida Realtors® Emerging Technology Committee provides recommendations for Form Simplicity.

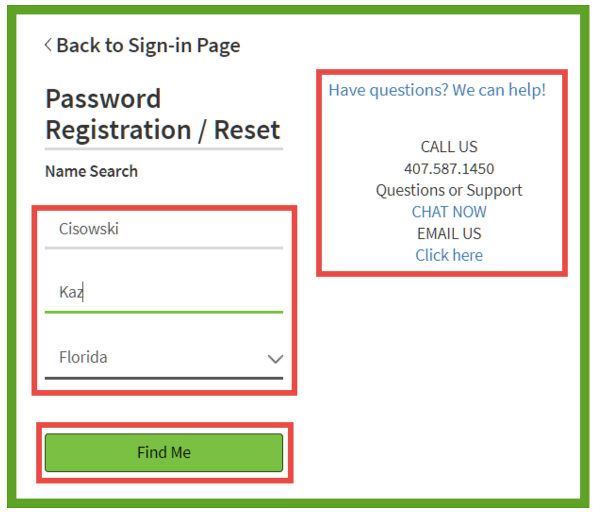
How will Form Simplicity help you work smarter in your real estate business?

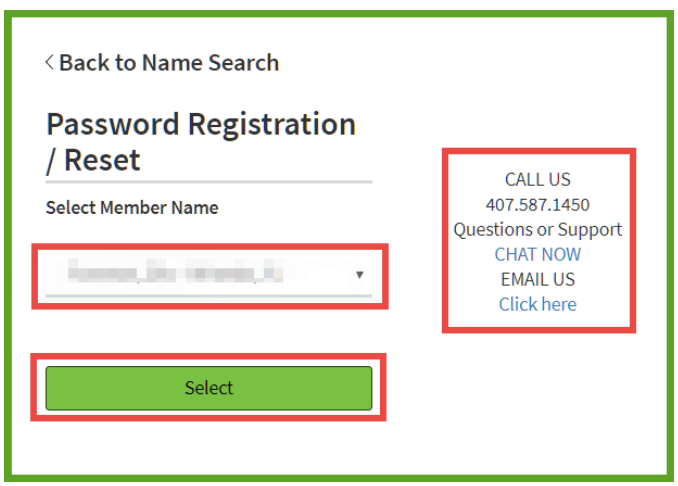
- Works on all mobile devices, access anytime, anywhere via the internet.
- Gives you quick access to the Form Library which is always current.
- Easy auto-fill tools reduce time spent typing data into the forms.
- Improve efficiency by creating form packages of your most frequently used forms.
- Store 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.





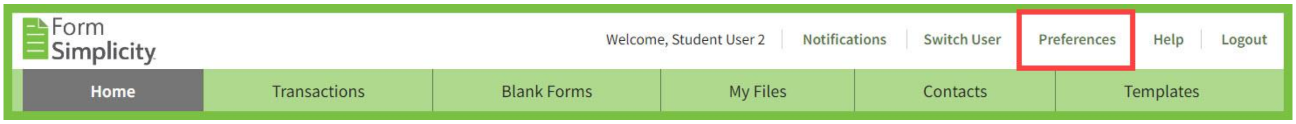


If you are having problems registering for Form Simplicity or have issues with your log in or logging in, please contact the Florida Realtors® Tech Helpline for assistance.

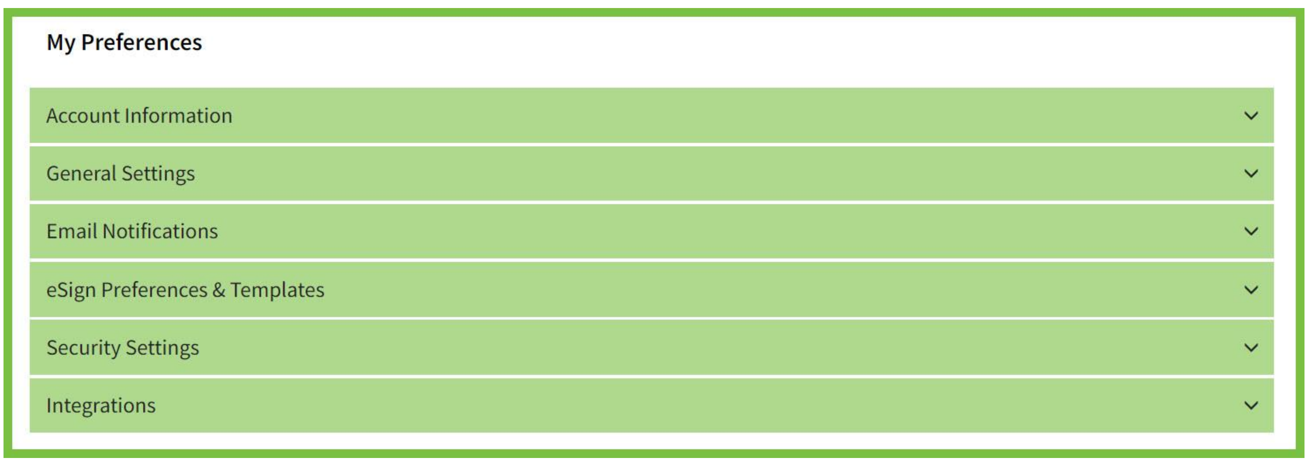
My Preferences: Introduction

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.



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



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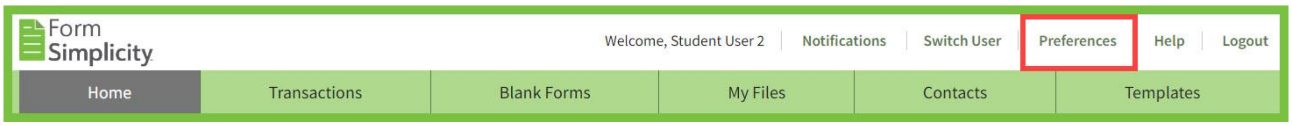
My Preferences: General Settings

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.

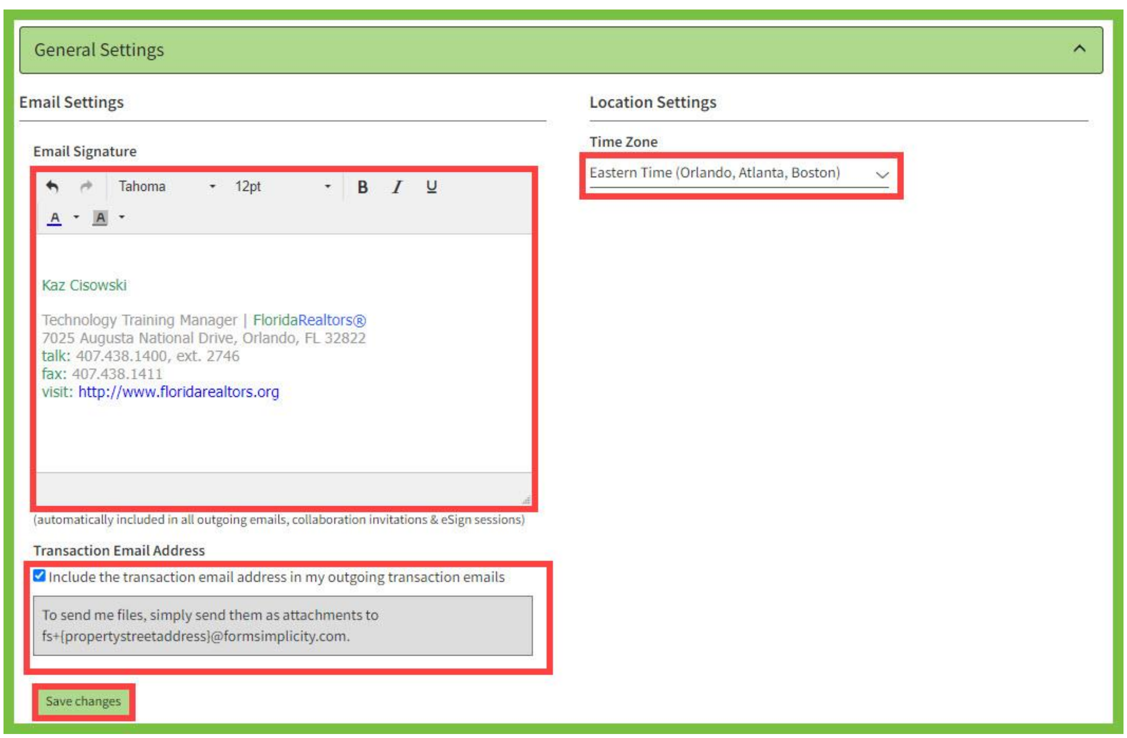
1. Log in to Form Simplicity.

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



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.

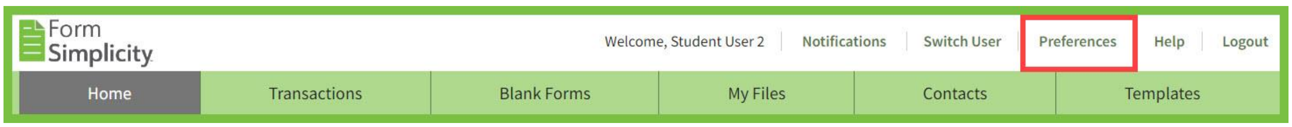


5. Once complete, click the **"Save Changes**" button. Then the Form Simplicity confirmation message "***We have successfully saved your settings***." will appear below the main navigation menu.

My Preferences: Email Notifications

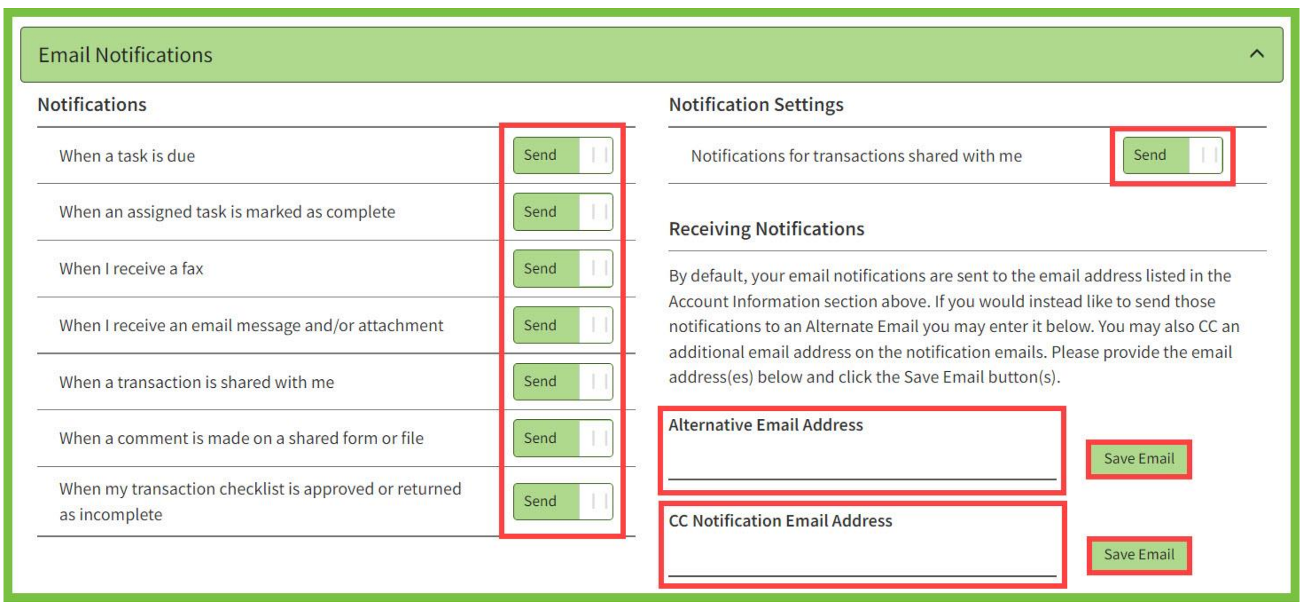
You can make Form Simplicity work for you by activating push notifications to your email address listed in the ***Account Information*** section when using Form Simplicity's Email Notifications. Push notifications are email reminders for events such as task reminders, collaboration comments or broker 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.



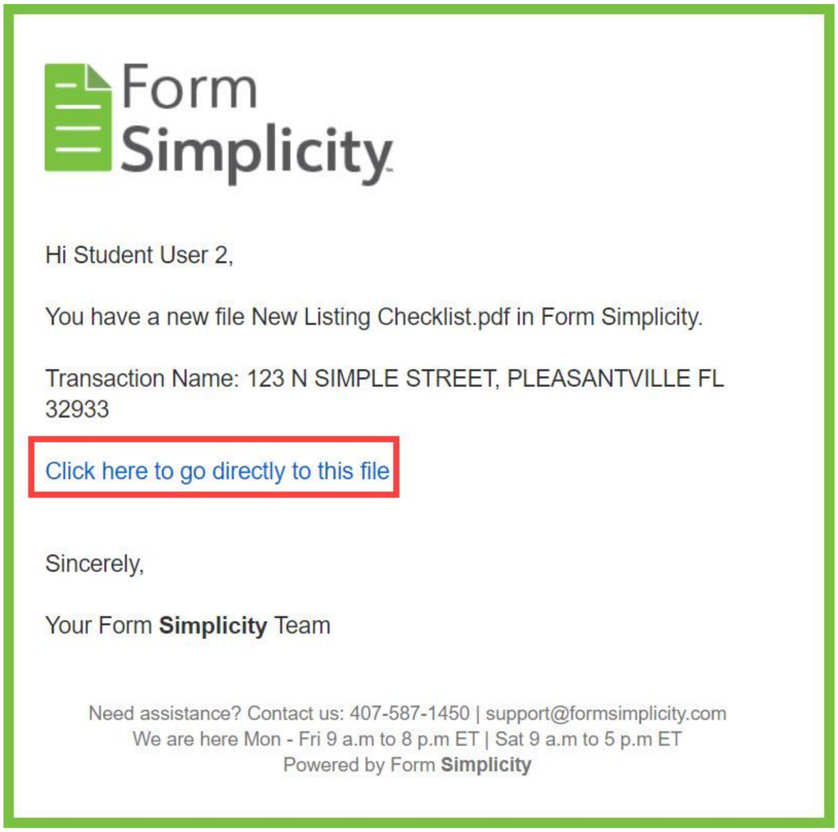
2. In the ***My Preferences*** screen, click on the ***Email Notifications*** section header to expand it.

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.



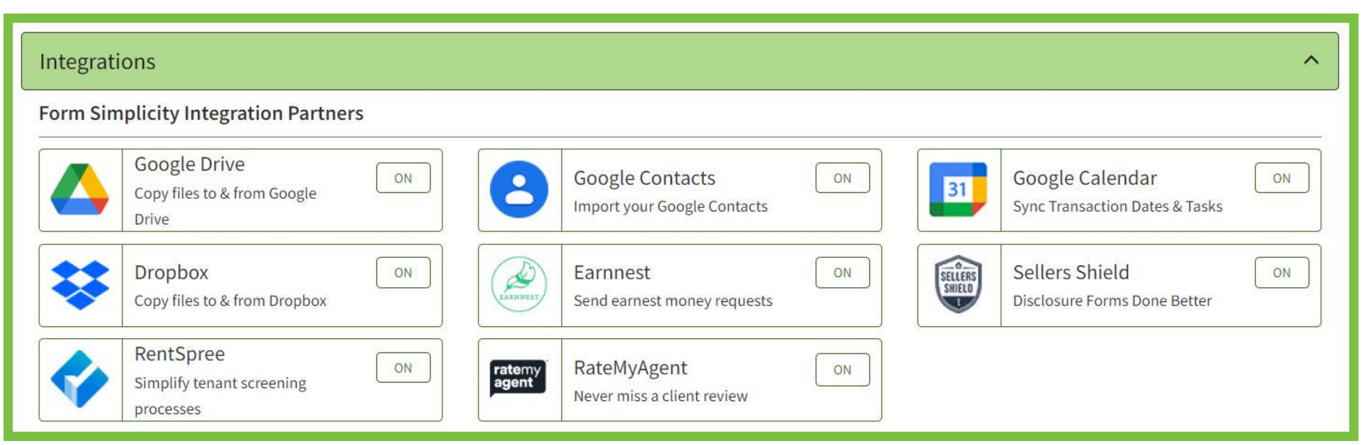
*Note: Email notifications are sent to the email address that is listed in the **Account Information** section. If you would like to have your notifications sent to a different email address, type it in the **Alternate Notification Email Address** field and click the **"Save Email"** button. Also, if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



My Preferences: Integrations

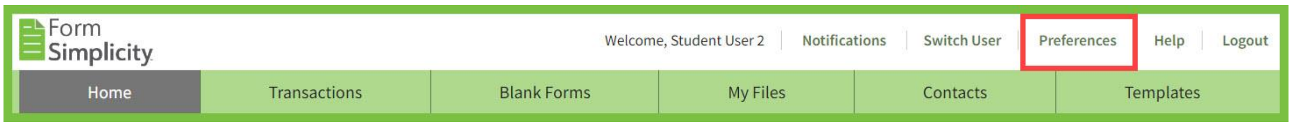
Form Simplicity will continue to partner with other technology companies to integrate with to develop deep integrations through integration apps. The apps will provide users with exceptional network context within the tools, and in the format, you're already using.



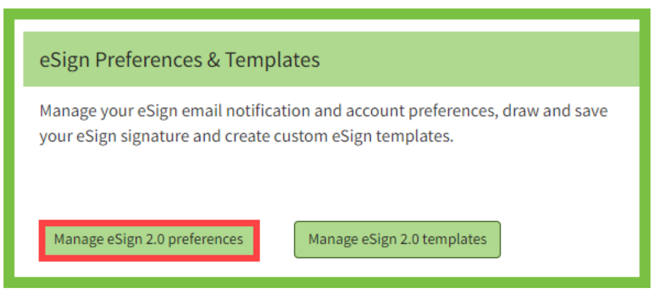
eSign Preferences: Email Notifications (Ultimate Edition)

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.

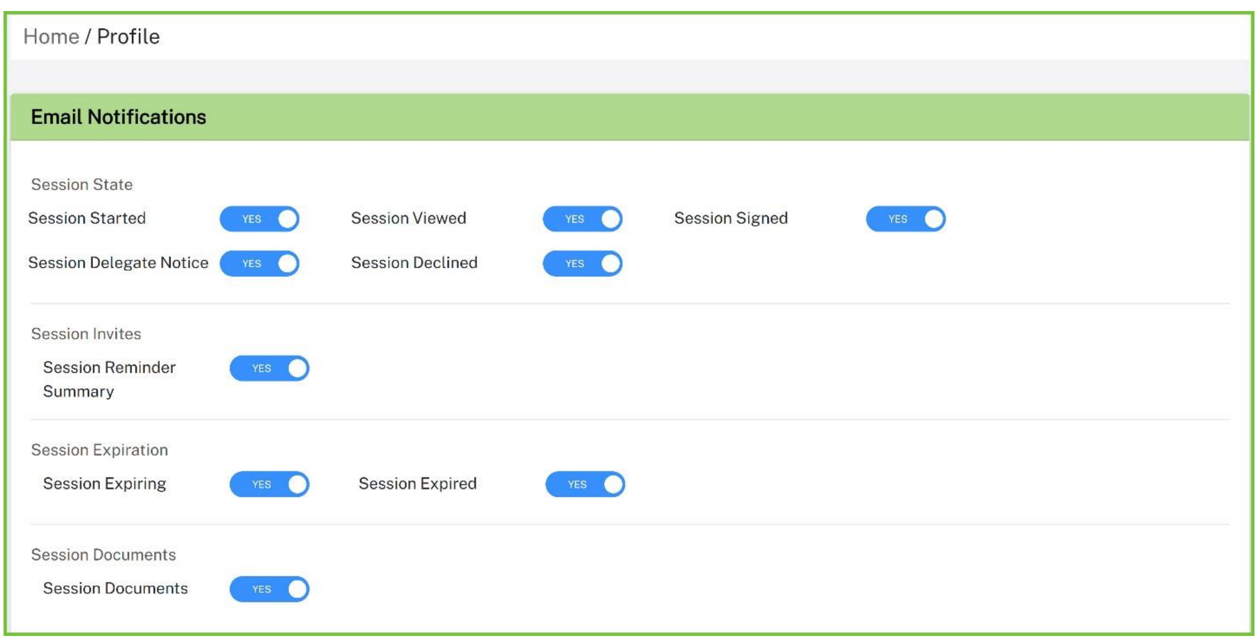
1. To manage your eSign email notification and account preferences, log in to Form Simplicity and click on the **"Preferences"** link in the upper right side of the Form Simplicity home page.



2. 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.

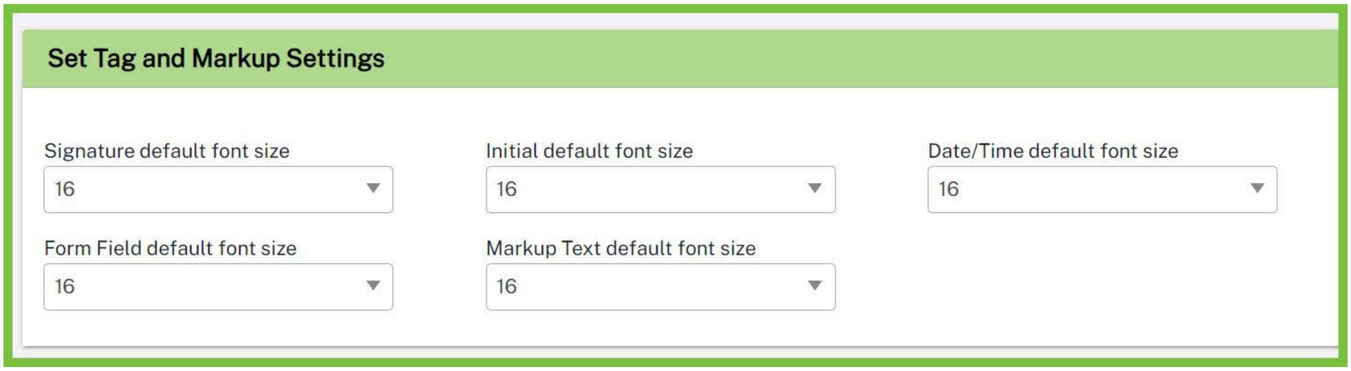


eSign Preferences: Attachments (Ultimate Edition)

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

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.*



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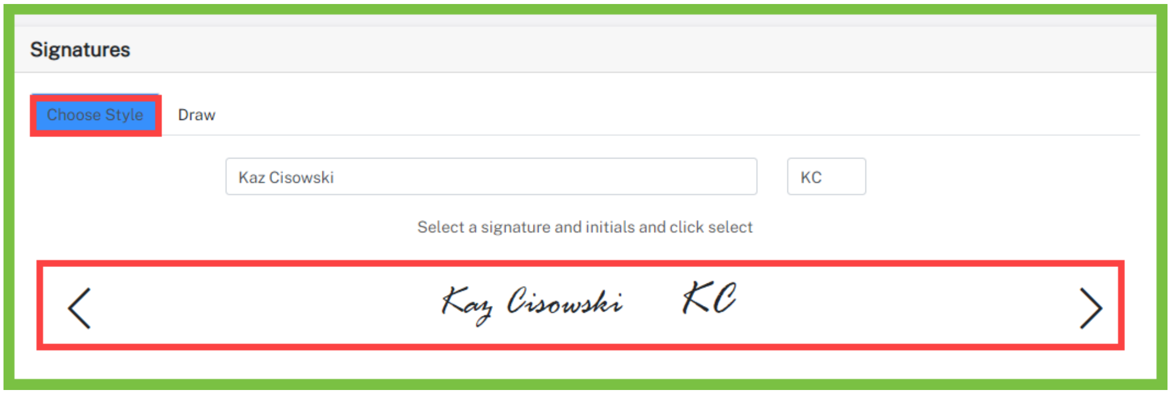
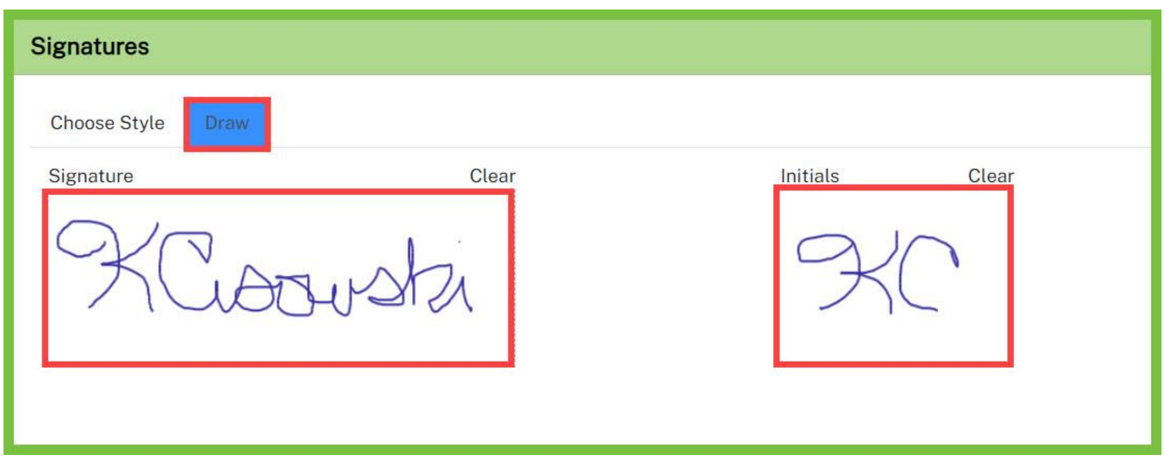
eSign Preferences: Signatures (Ultimate Edition)

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.



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



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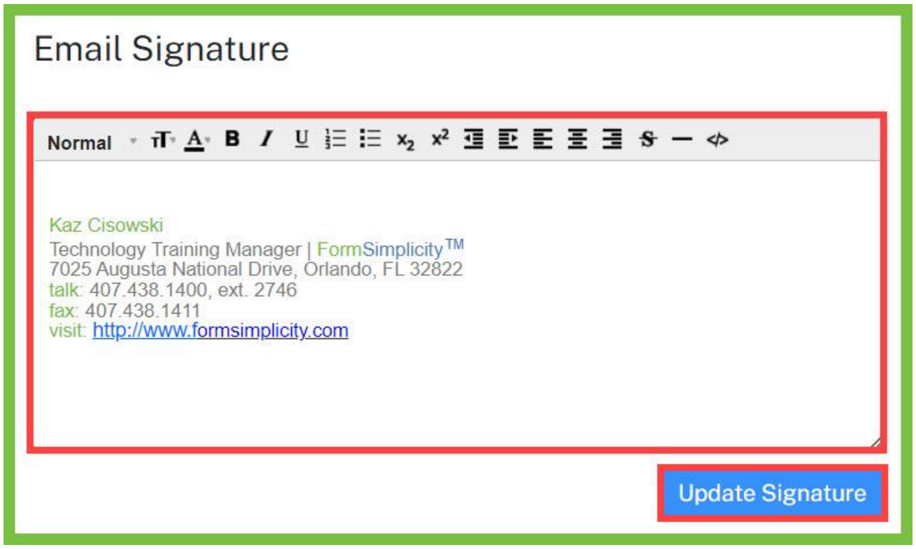
3. If you did not set up your email signature in the ***General Settings*** section of ***My Preferences***, you can also set up and save your email signature that you will send during the signing process.



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

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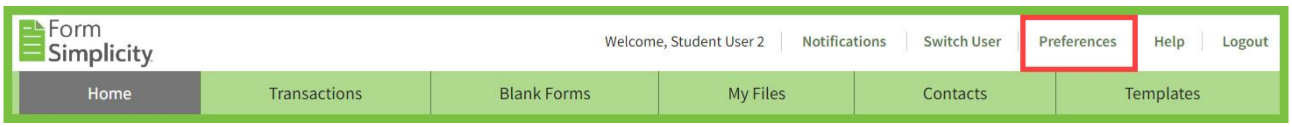
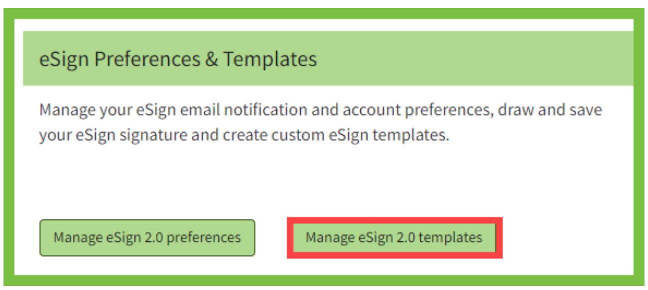
eSign Preferences & Templates: Templates (Ultimate Edition)

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.

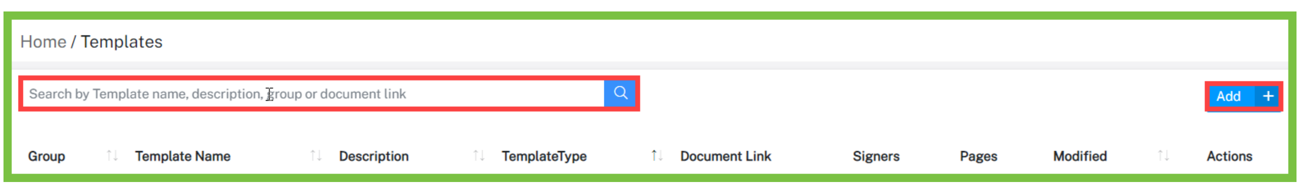
1. To manage your eSign email notification and account preferences, log in to Form Simplicity and click on the **"Preferences"** link in the upper right side of the Form Simplicity home page.



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.

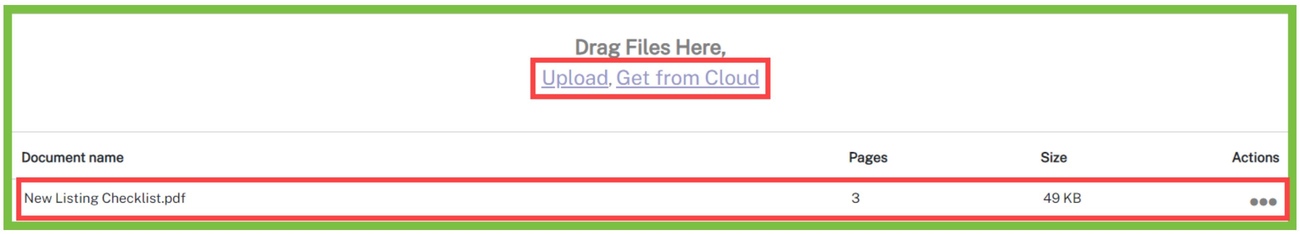


4. Under the ***Documents*** section on the top of the ***Home/Template/Template Draft*** page, enter the eSign template in the Template draft field and enter the Description as needed.

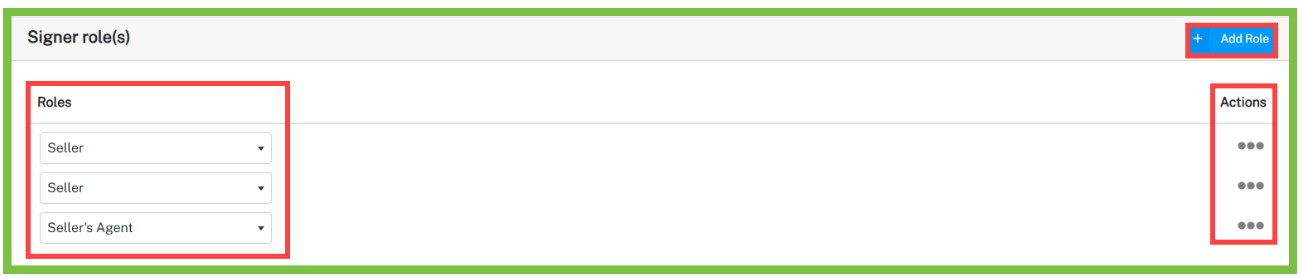
5. Upload your document. There are three options when adding a document to a template. The available options are:
   - **Drag Files Here** - Drag and drop your documents to your documents section.
   - **Upload** from your computer or local drive, navigate to the document then select it.
   - **Get from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



6. 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.



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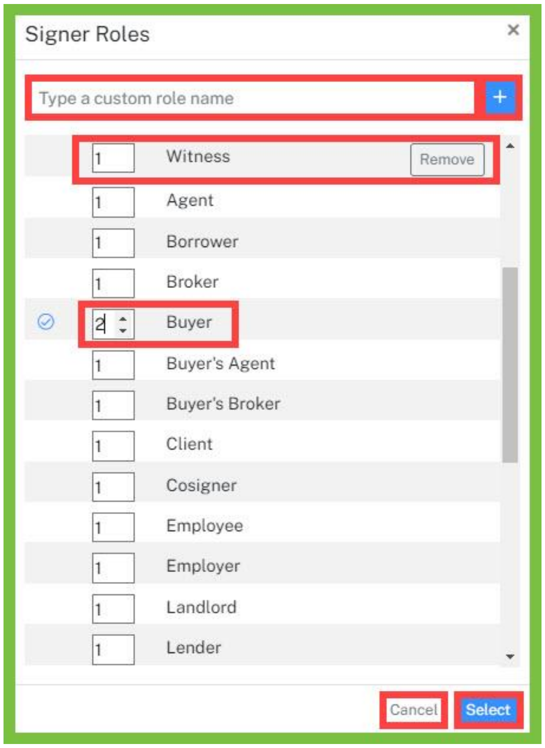
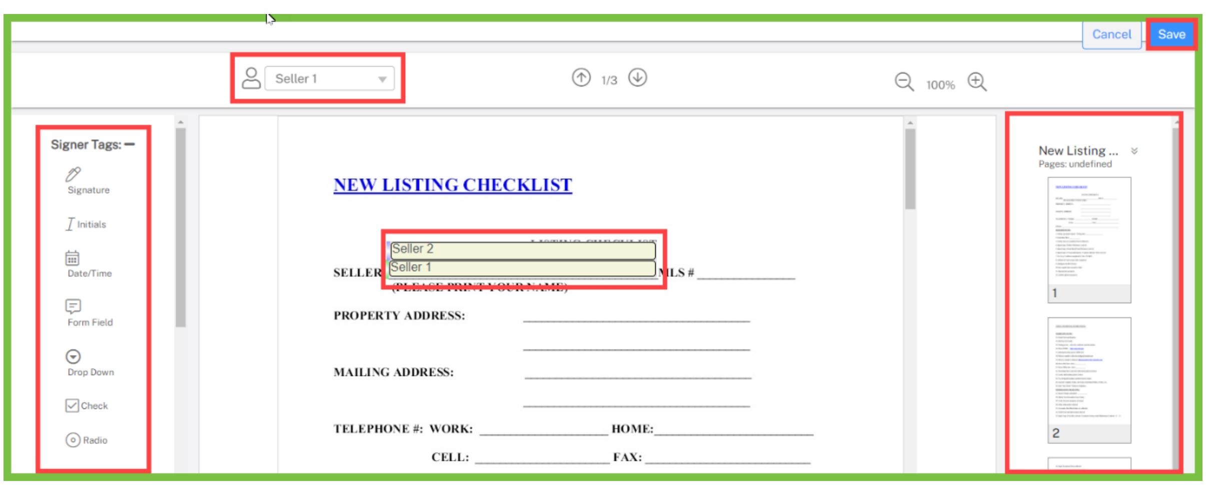
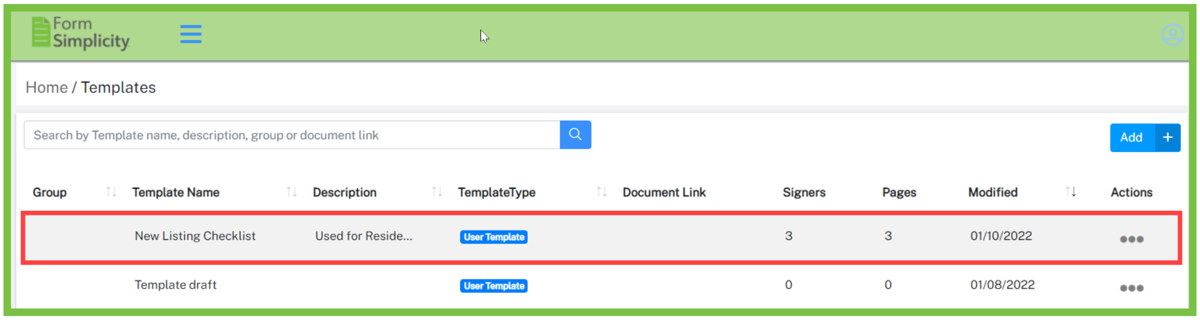
7. The ***Signer Roles*** pop-up window appears allowing you to choose one or more signer roles as well as the number of a specific signer role. You can add a signer role not on the list by entering it in the **"Type a custom role name"** field and clicking on the **plus (+) sign**. That custom signer 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"**.



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.



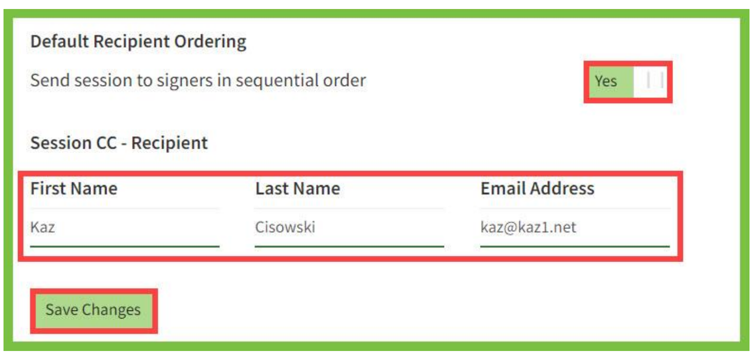
9. eSign will now know where to apply fields for that file in the eSign session.



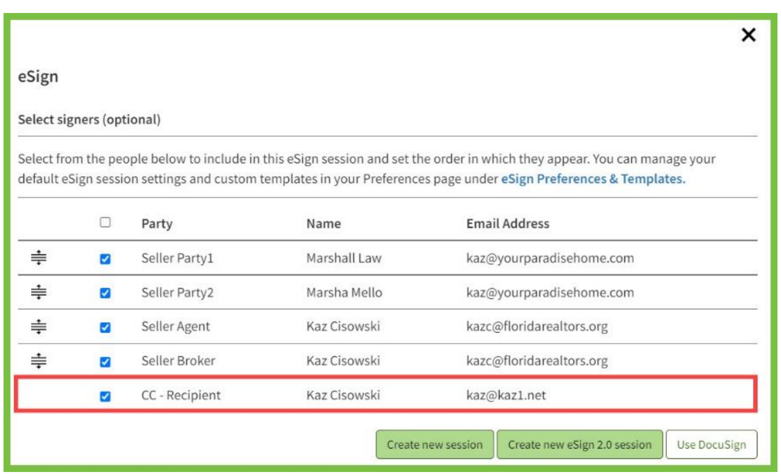
eSign Preferences & Templates: Default Recipient Ordering

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.



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.

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.

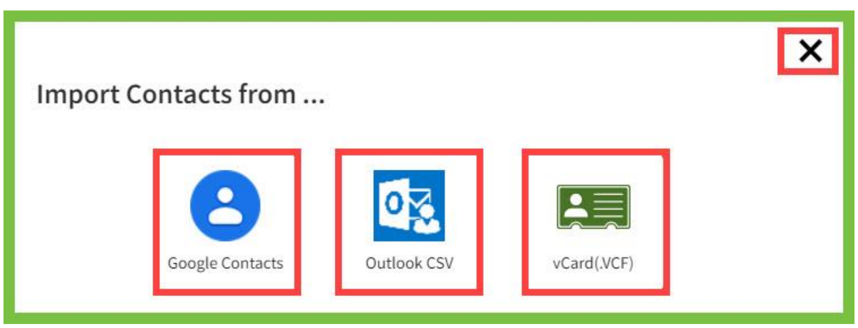
Contacts: Import Contacts

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.

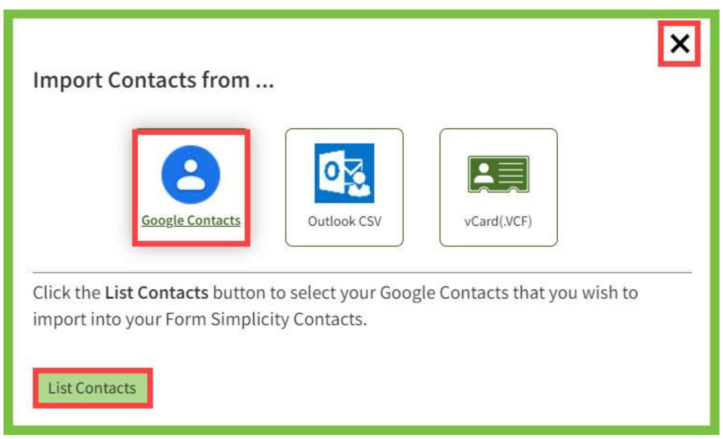
Contacts: Import Contacts - Gmail

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

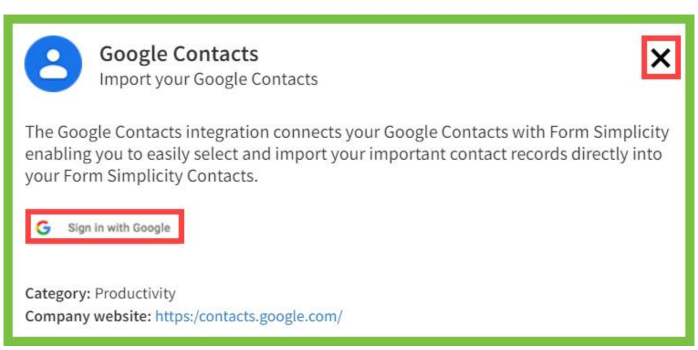
1. Log in and select **"Contacts"** from the main navigation menu at the top of the Form Simplicity home page. This will automatically open the ***People*** section.

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.



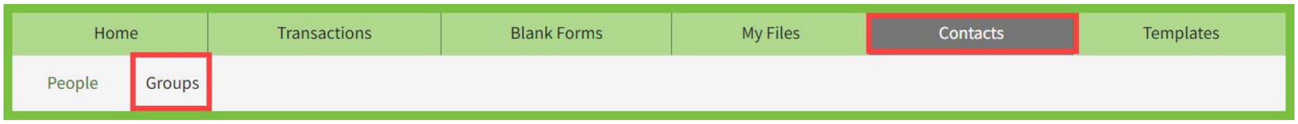
4. If the user did not enable the ***Google Contacts*** integration in ***Preferences***, they will need to authenticate each time they wanted to import contacts. In the Google Contacts pop-up window, click on the **"Sign in with Google"** button.



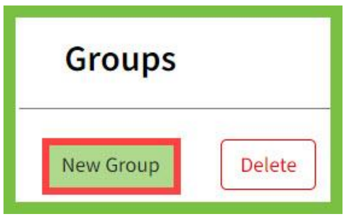
Note: This is not a Data Sync. This is a one-way import of the Gmail contacts. If a change is made in one location in the future, it will not automatically sync to the other.

Groups: New Group

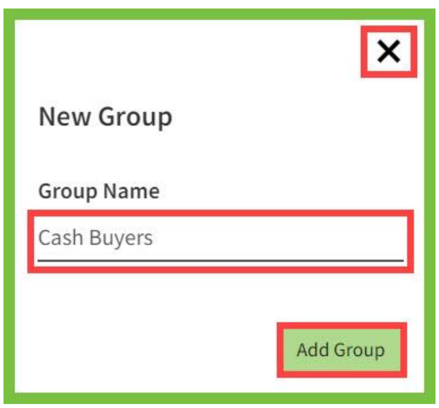
1. To create a **New Group** name, log in and select **"Contacts"** from the main navigation menu at the top of the Form Simplicity home page. Then click on **"Groups"** in the ***Contacts*** sub-menu.



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.



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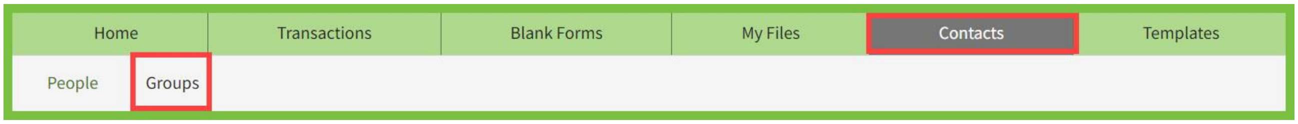
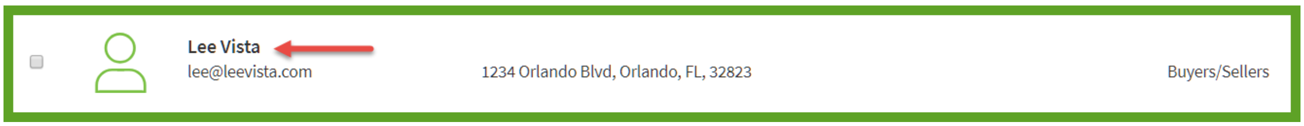
Groups: Add Contacts to Your Group

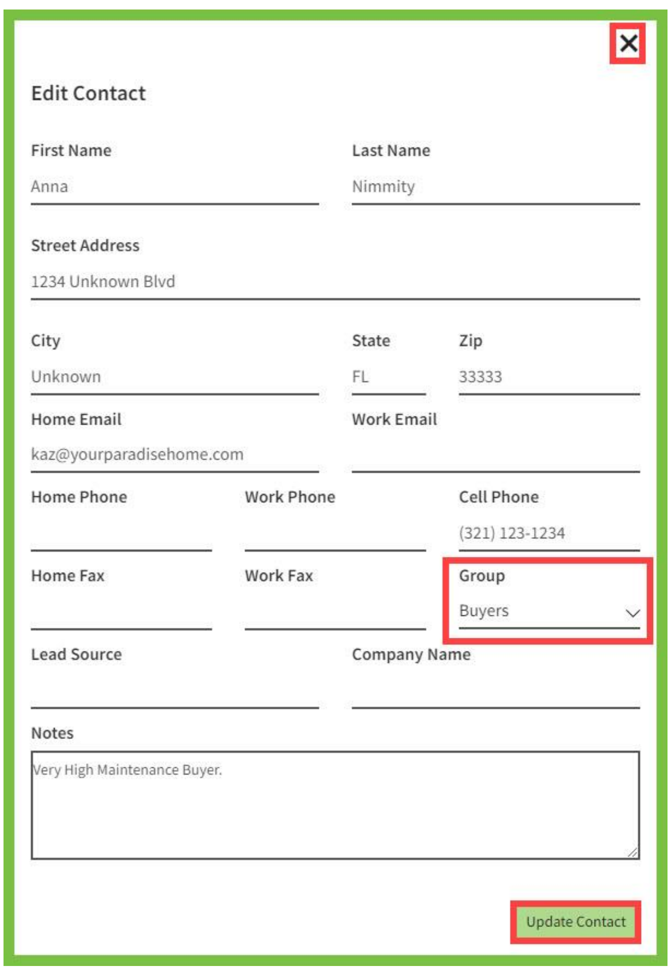
1. Switch from **“Groups”** to **“People”** in the ***Contacts*** sub-menu.



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



3. Once you locate the contact, click on their name to open their contact information. 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.

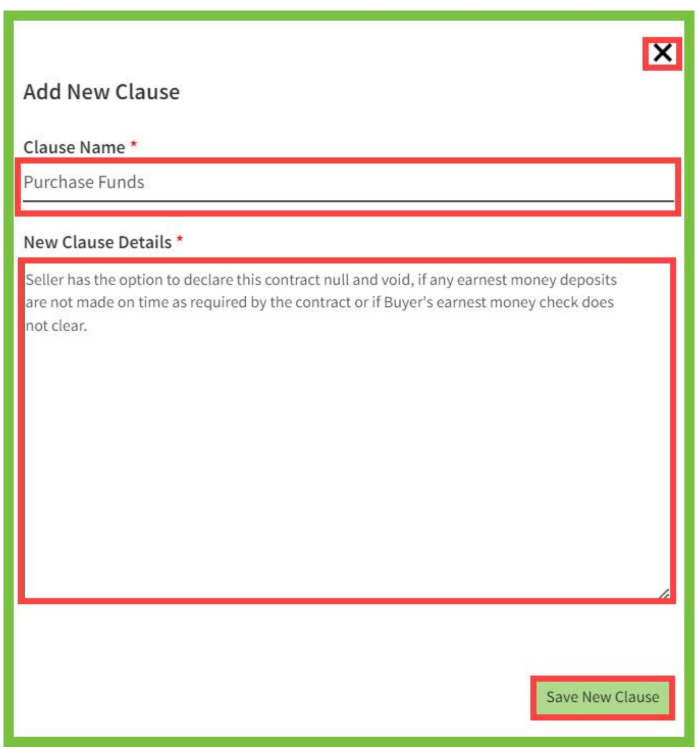


Clauses: Create a New Clause

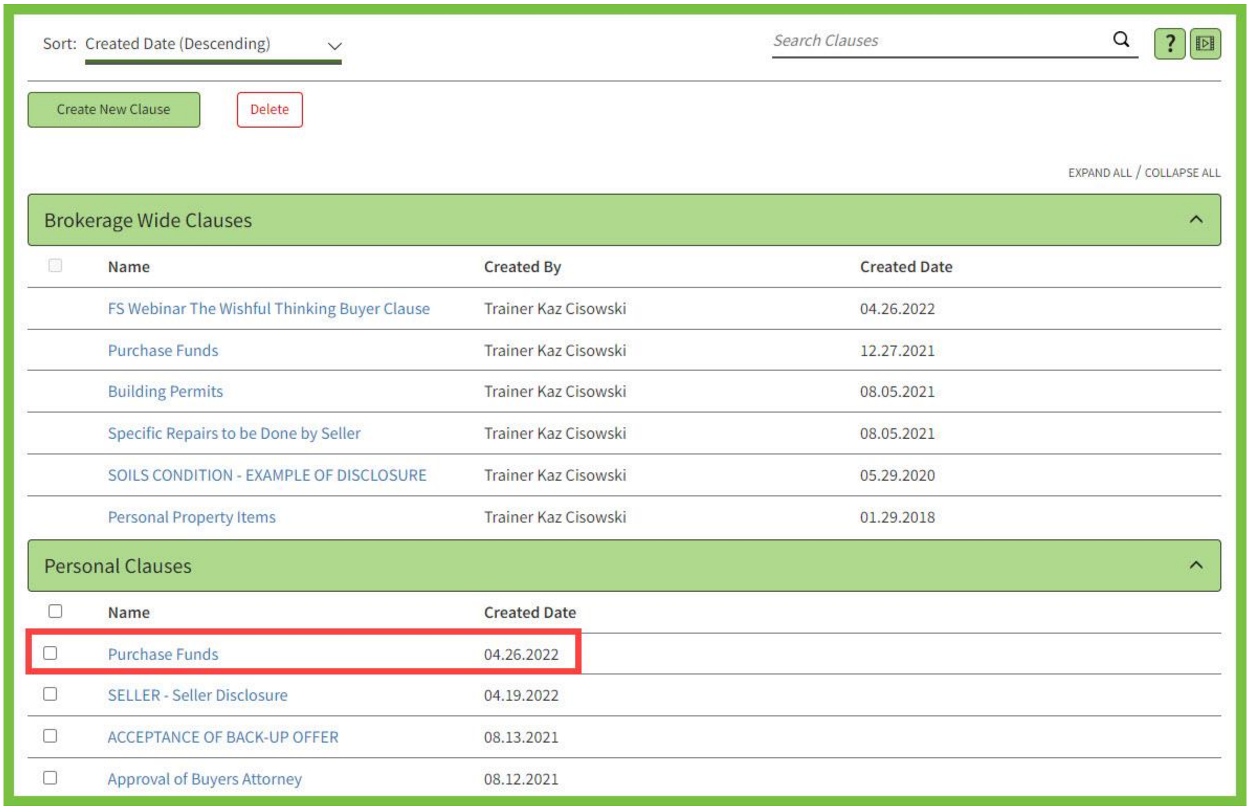
Creating clauses will allow you to save the phrases or wording you use for Form Simplicity transactions. Standard clauses can be created in Form Simplicity to be use again in multiple forms. Clauses can be created by the agent for their own personal use or by the broker for the other agents in the office 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.*



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.



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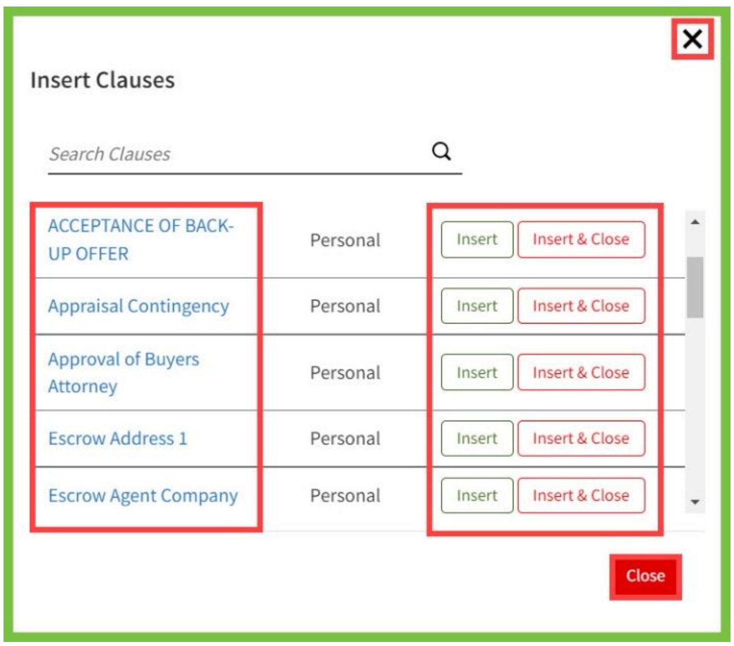
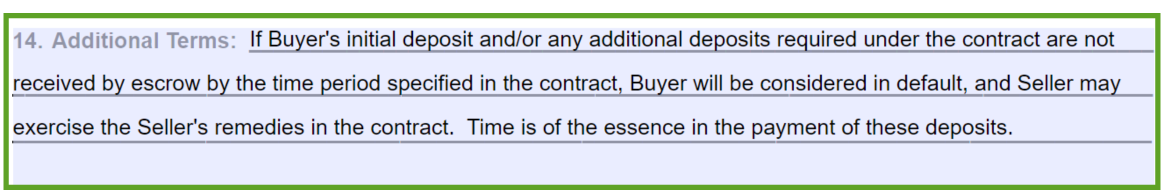
Clauses: Insert Clauses

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.



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



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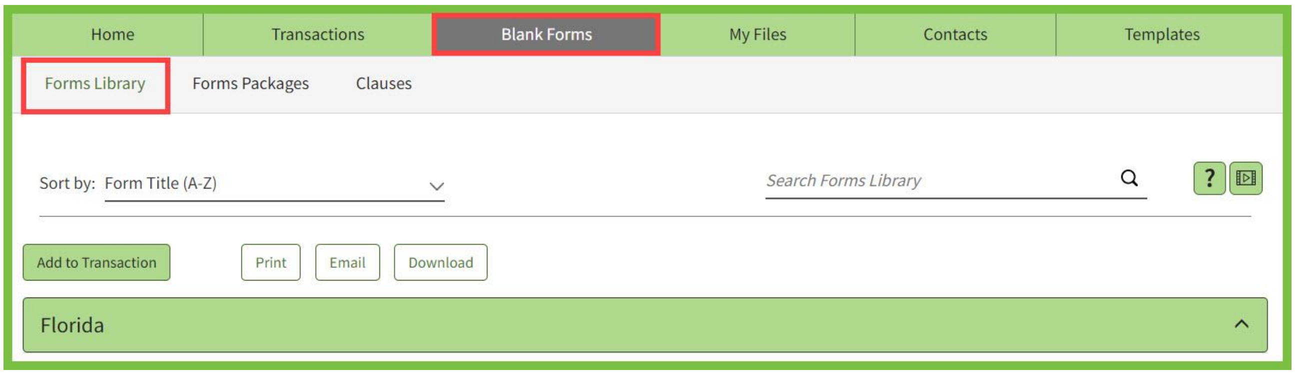
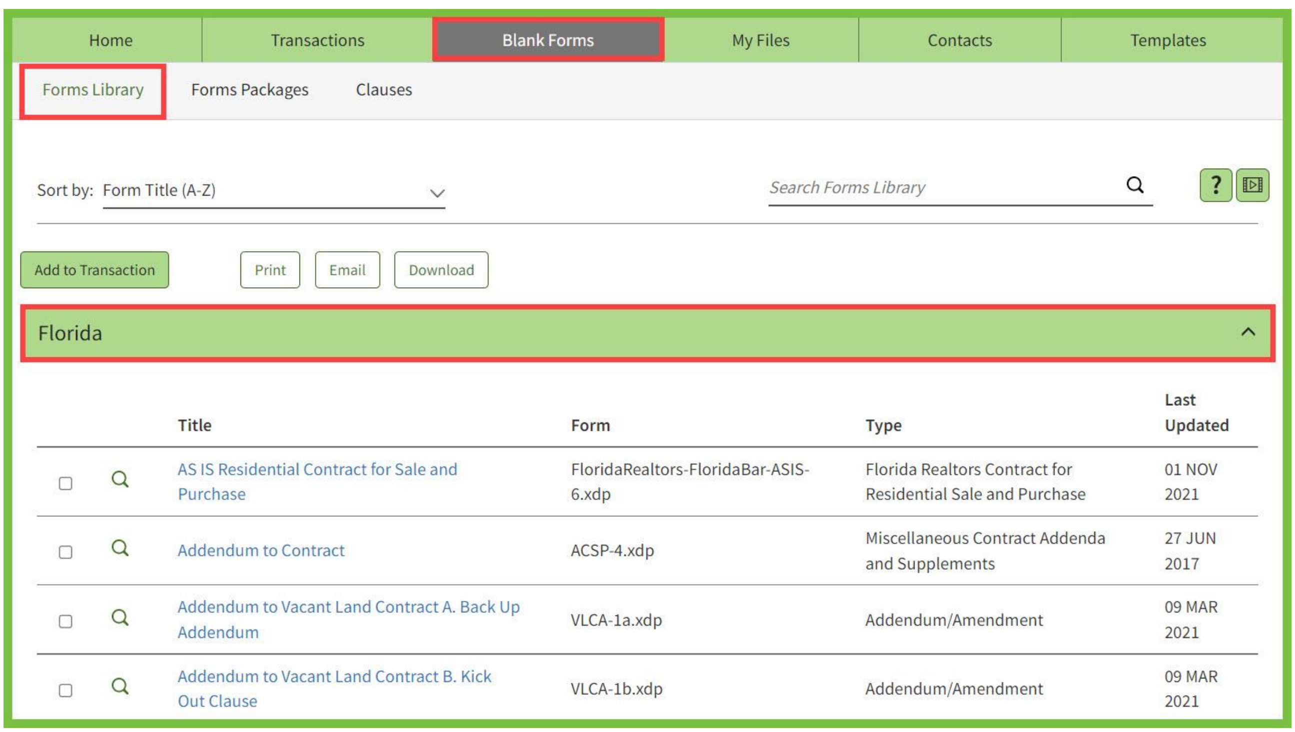
Forms Library: Introduction

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***.



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.



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.

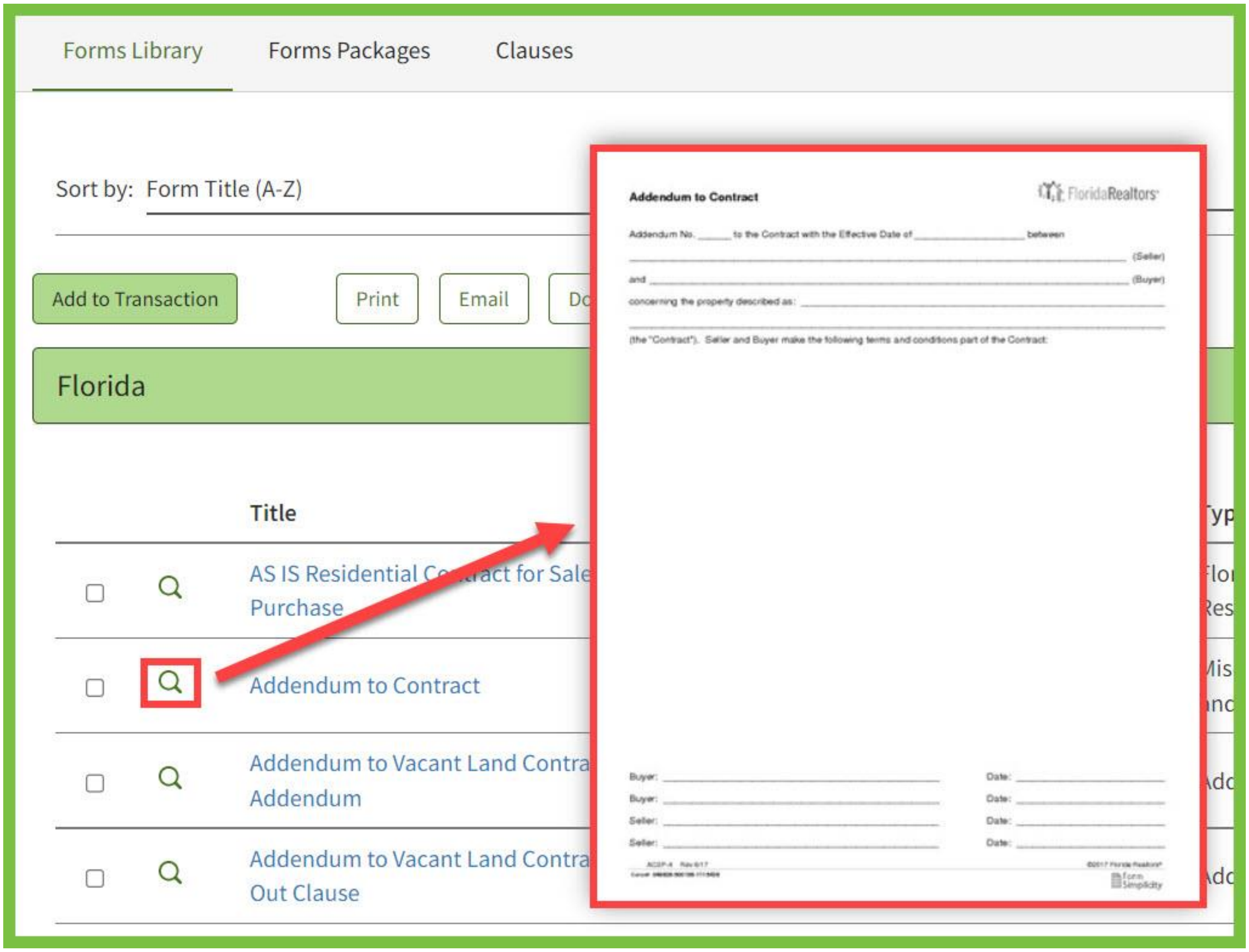
   Note: Limit your search to one keyword (e.g. residential) for best results.

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.

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.



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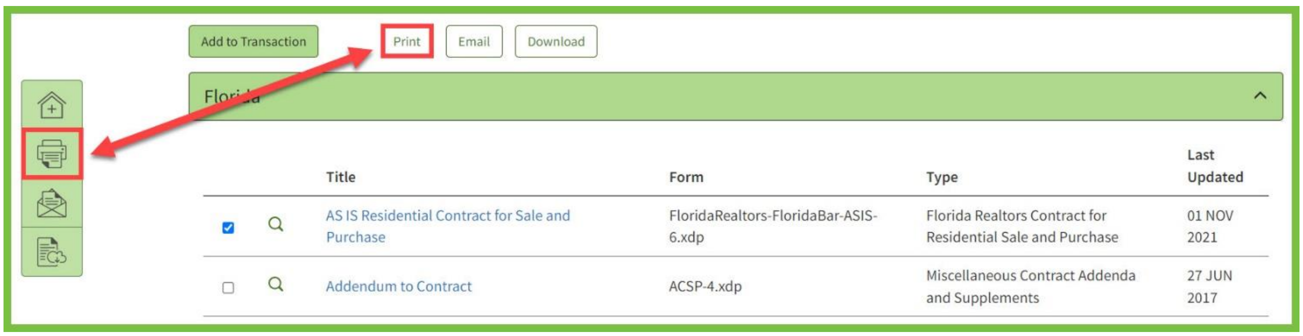
Forms Library: Print

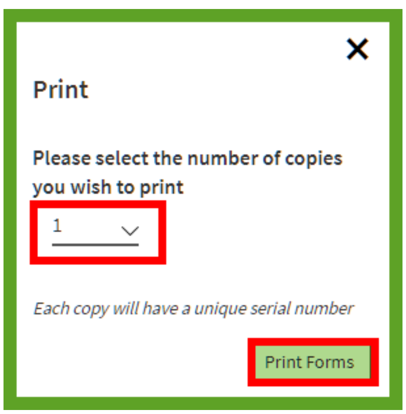
Print a blank form from the Forms Library when you need to work with a hard copy of the form. If you are working with another broker that is not working in a paperless office, you can print the required forms for them to sign and send back.

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***.

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.*



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.

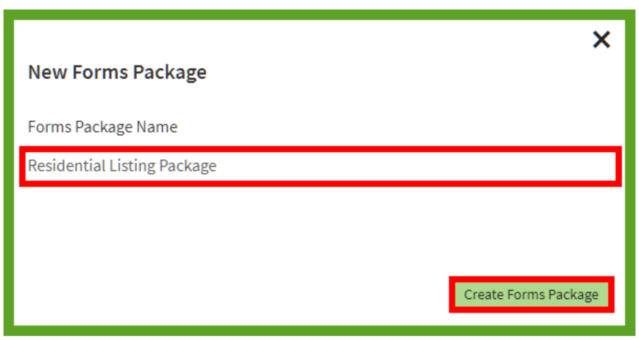


Forms Packages: Create a Forms Package

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.

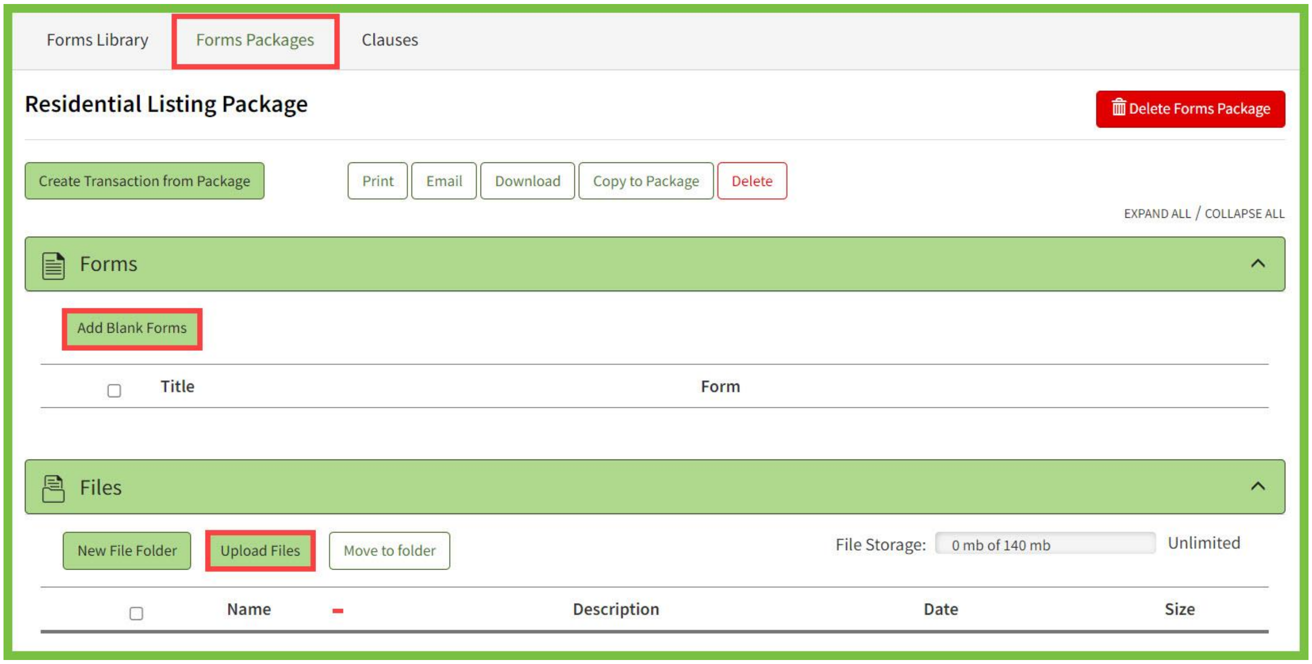
1. Create a forms package by clicking on the **"Create a Forms Package"** button on the bottom of the Form Simplicity home page.

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.



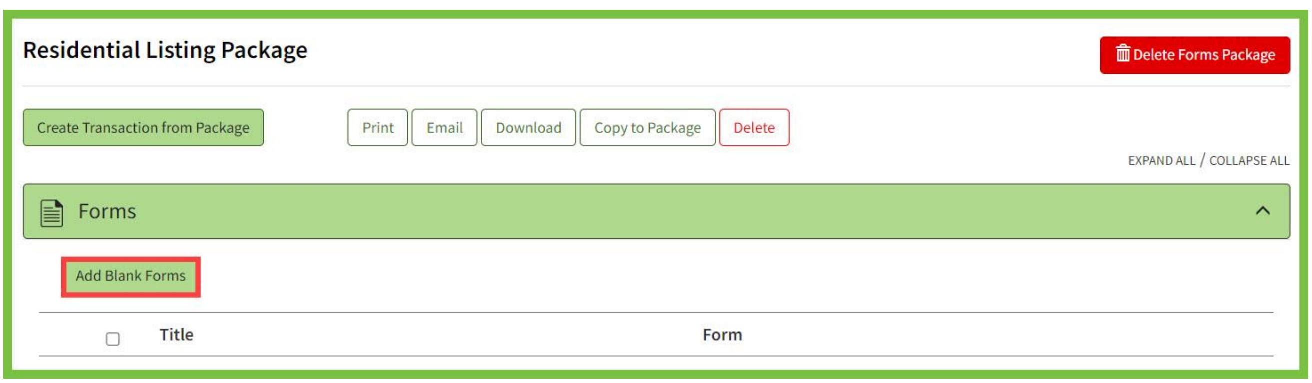
Note: At this point, your folder will be empty. Add forms to your package next.

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



Forms Packages: Add Blank Forms to the Package

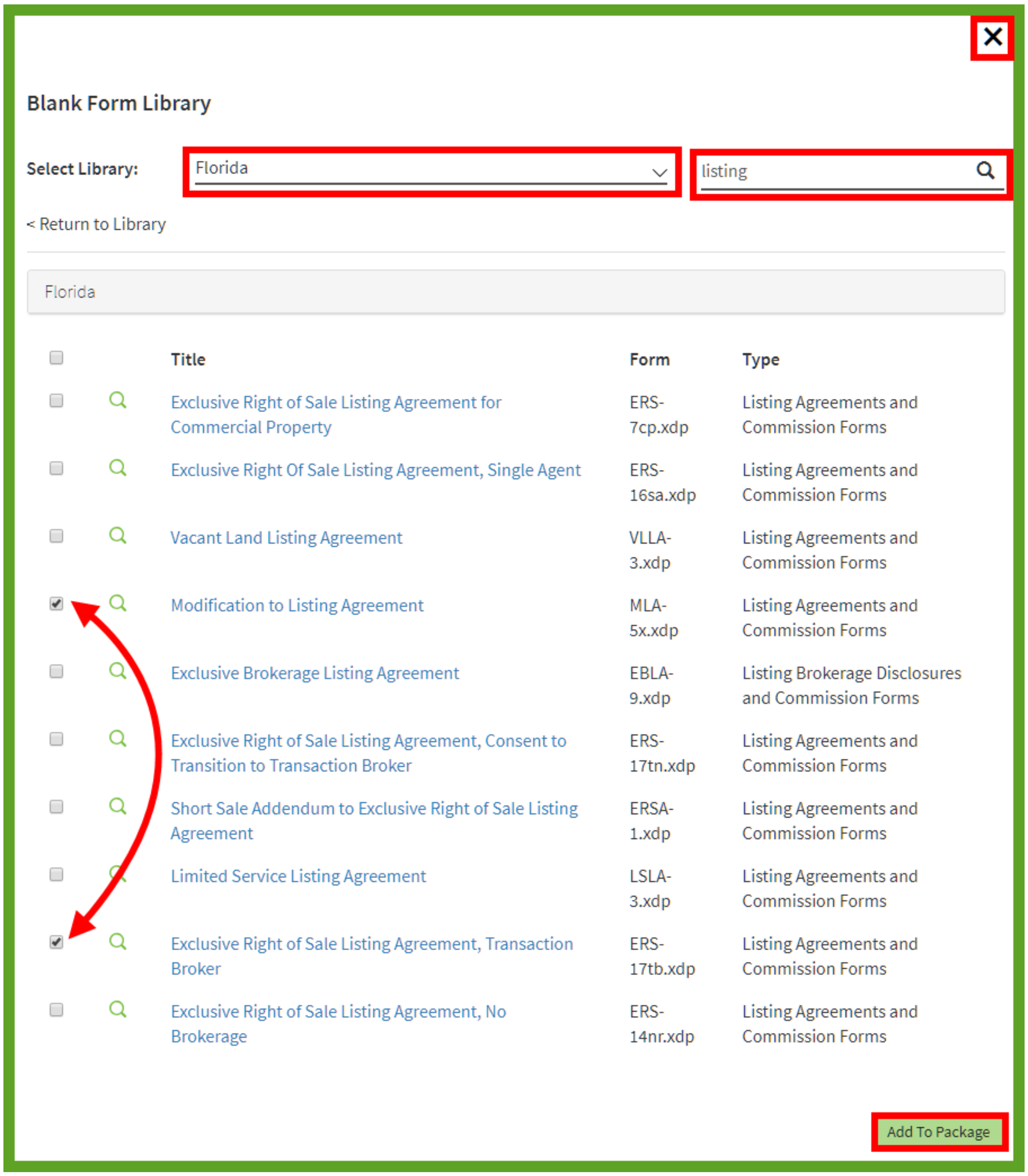
4. Click on the **"Add Blank Forms"** button located below the ***Forms*** section.



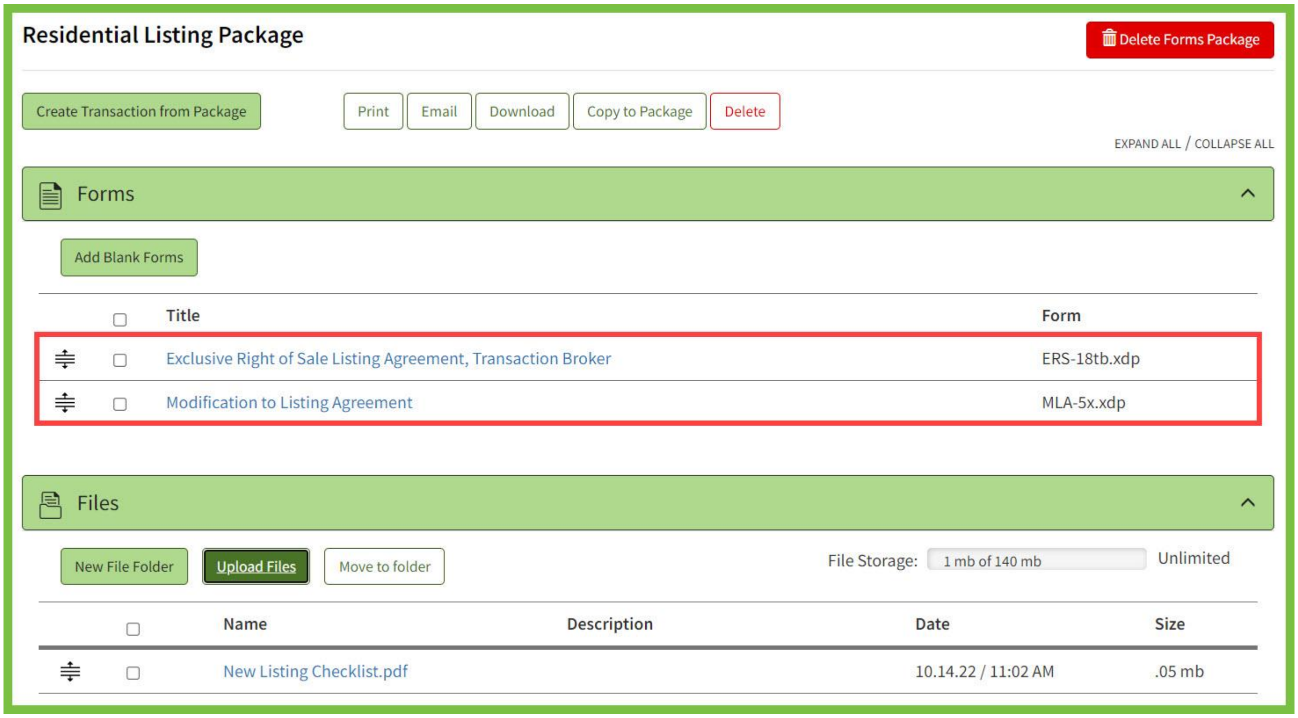
5. When the ***Blank Form Library*** pop-up window opens, click on the **"Select a Library"** drop-down arrow to select a library of forms; e.g., Brokerage, State Association, or Local Association form libraries. Place a check mark next to the form(s) that you want to add to your package, then click 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)****.*

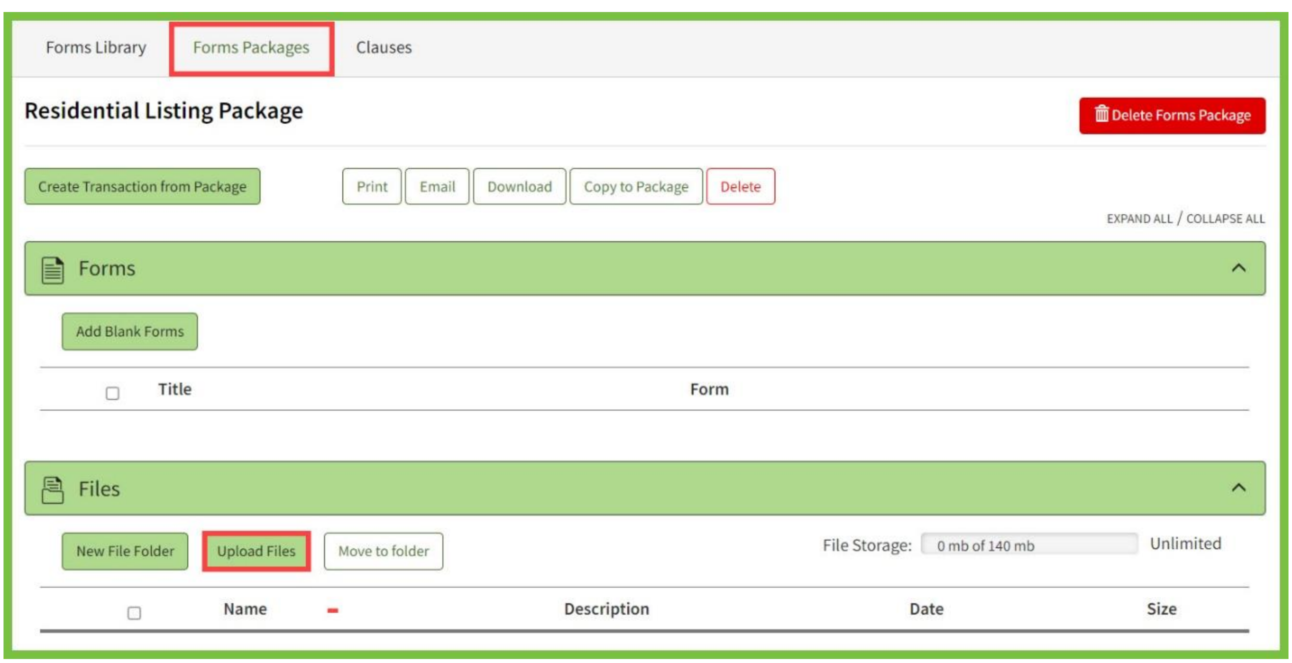


7. The form(s) you uploaded will now be listed under the ***Forms*** section of your package.

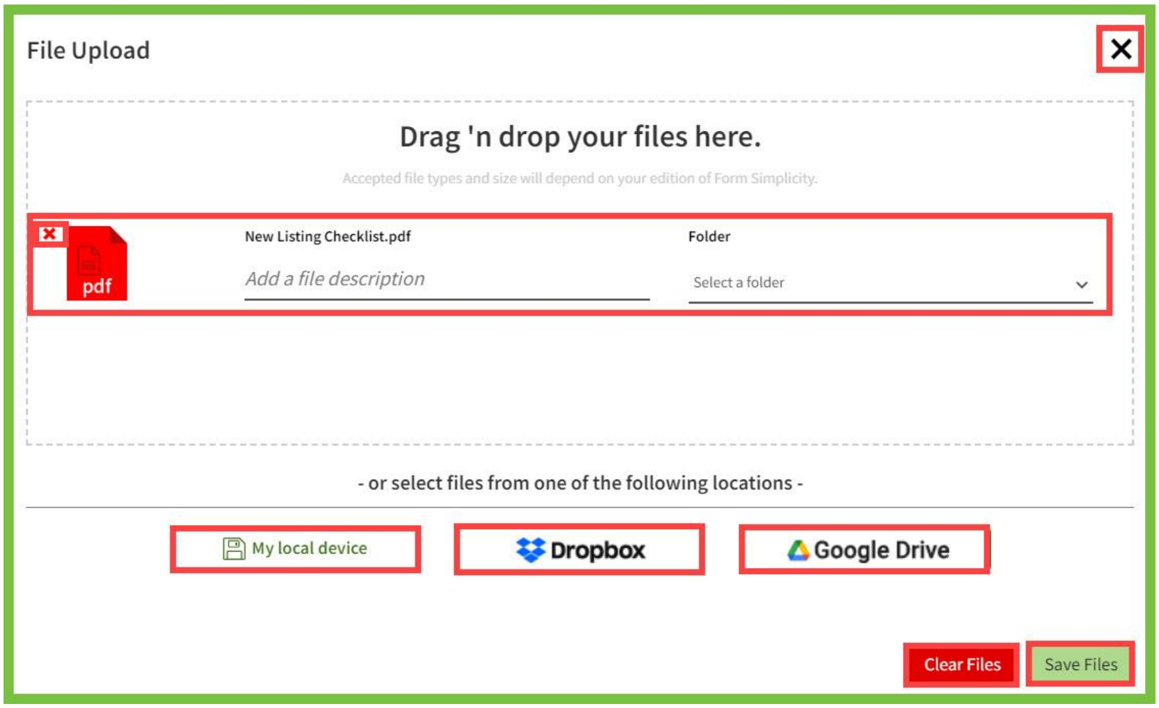


Forms Packages: Upload Files to the Forms Package

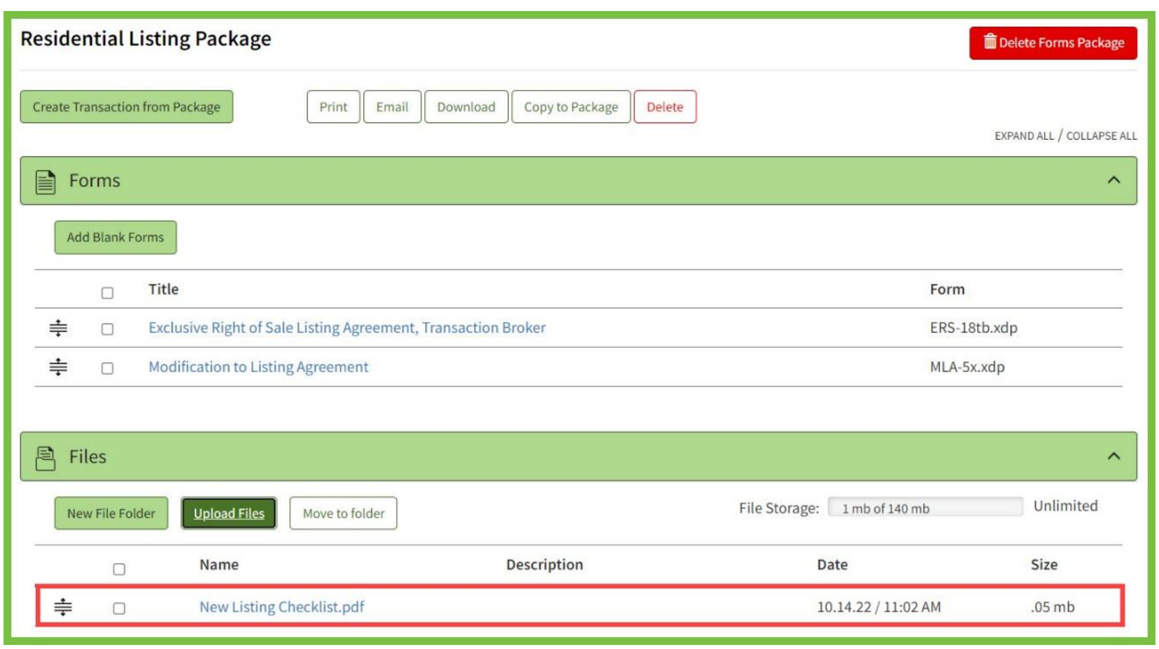
8. After adding your forms to the ***Forms*** section of the package, then go to the ***Files*** section, click **"Upload Files."**



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.



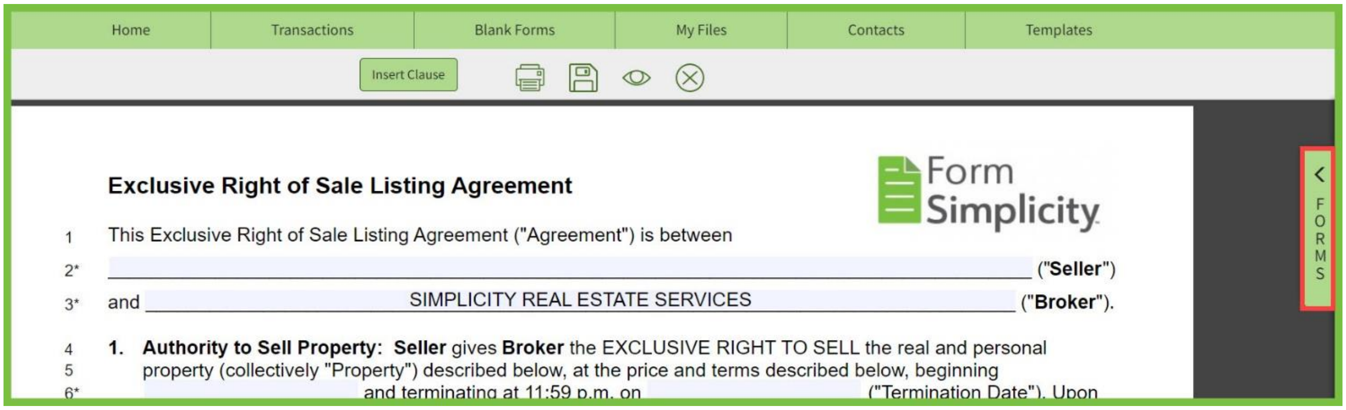
10. The file(s) you uploaded will now be listed under the ***Files*** section of your package.



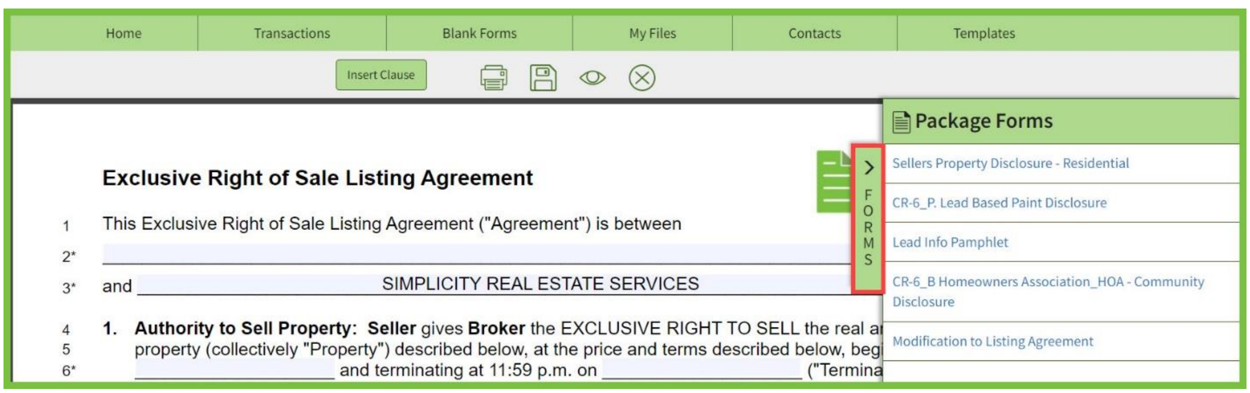
Note: Files that are uploaded are static: not editable and will not auto-populate data.

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.



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.



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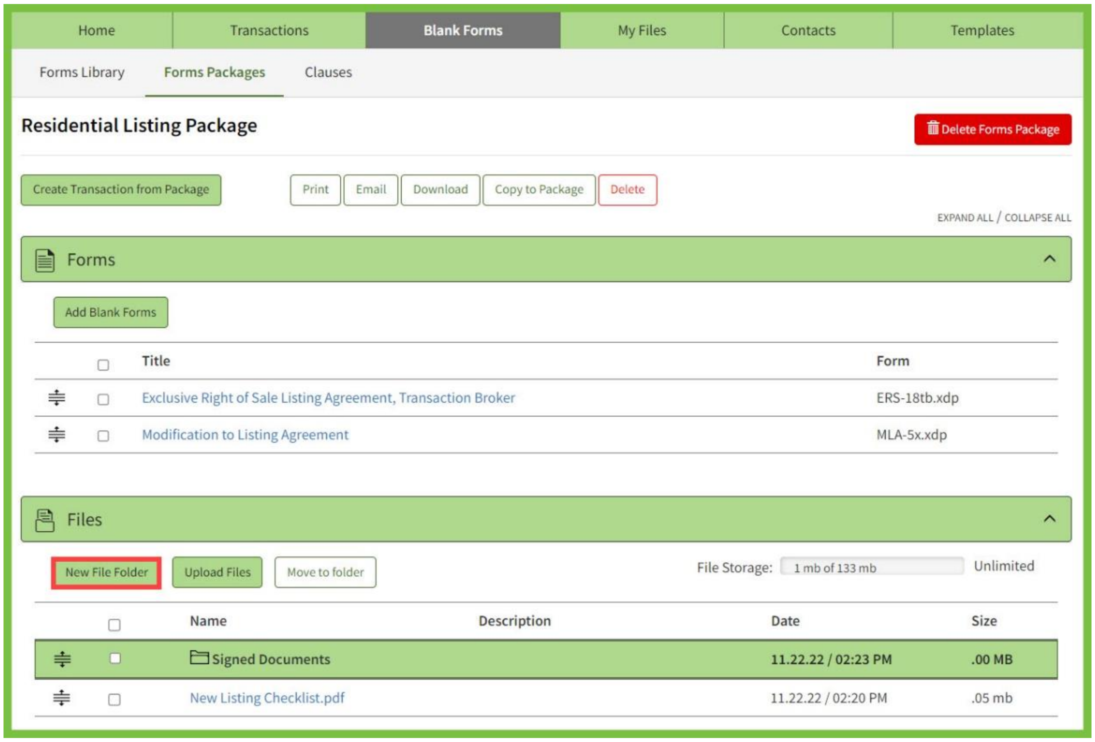
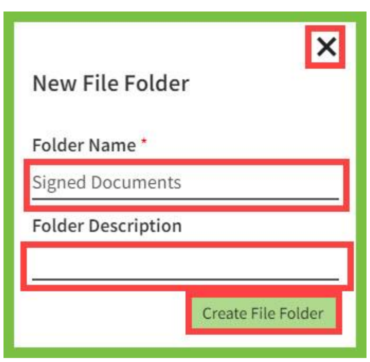
Forms Packages: Create a Package File Folder

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



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.

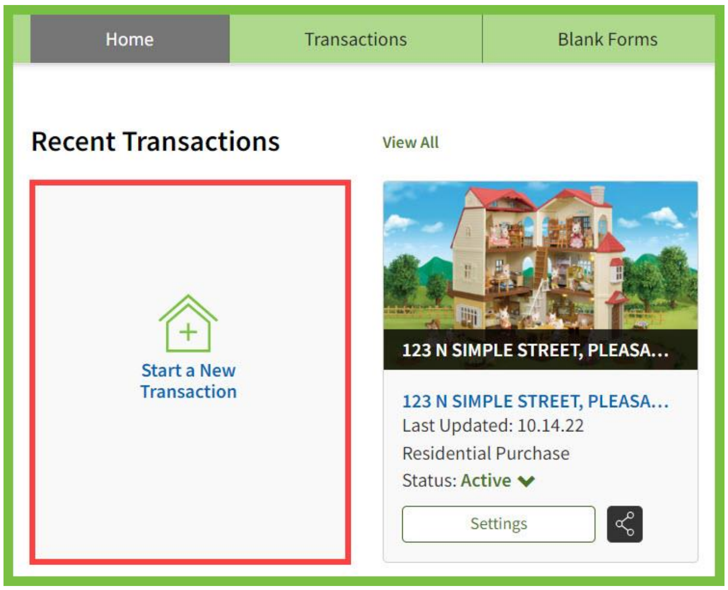


3. The new file folder will appear at the top of the ***Files*** section.

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



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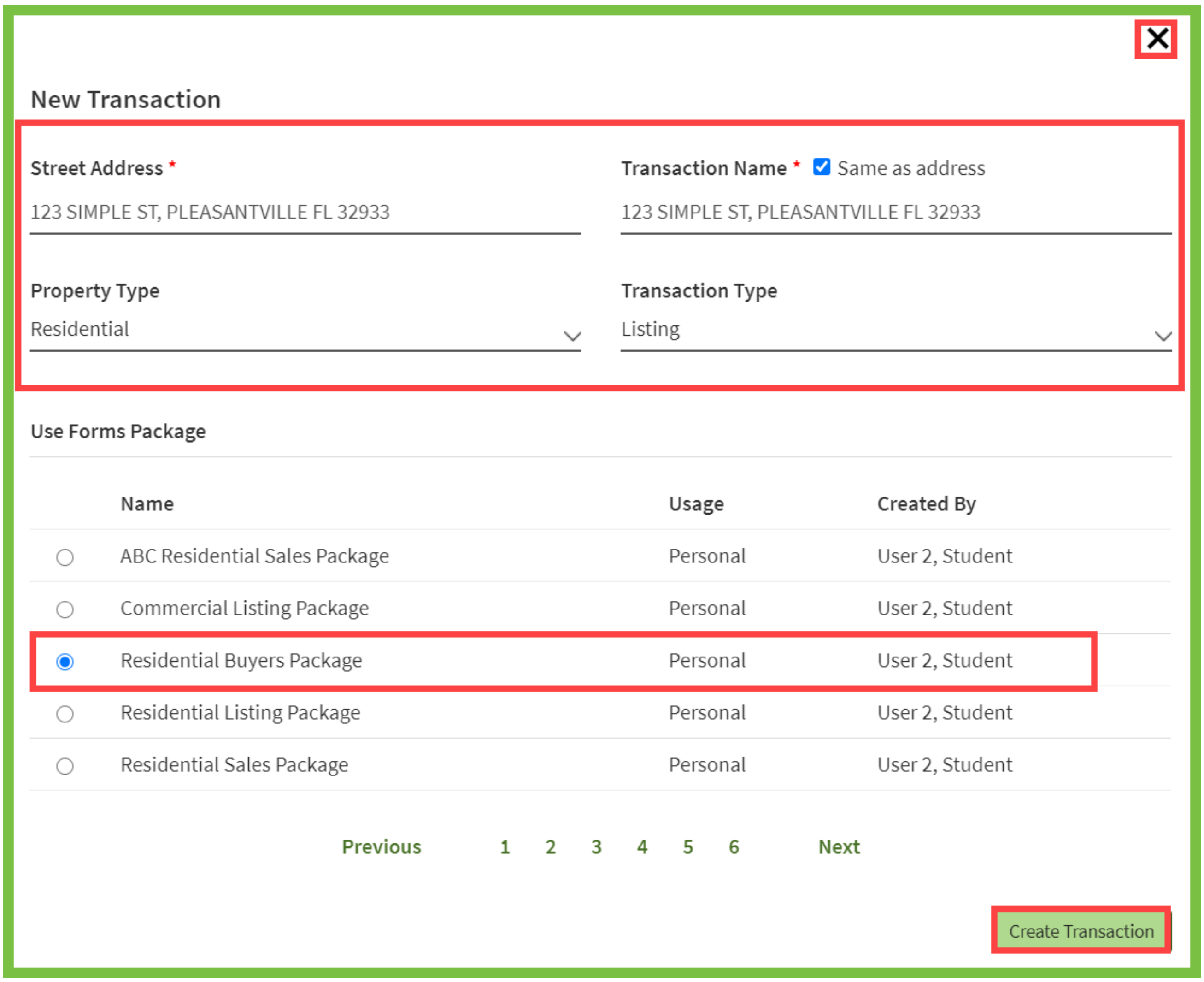
2. In the first part of the ***New Transaction*** pop-up window, enter the **Street Address** (required) and assign a **Transaction Name** (required). *Note: The check box will allow you to quickly name the transaction to be the same as the street (property) address.* Then, select a **"Property Type"** (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.*

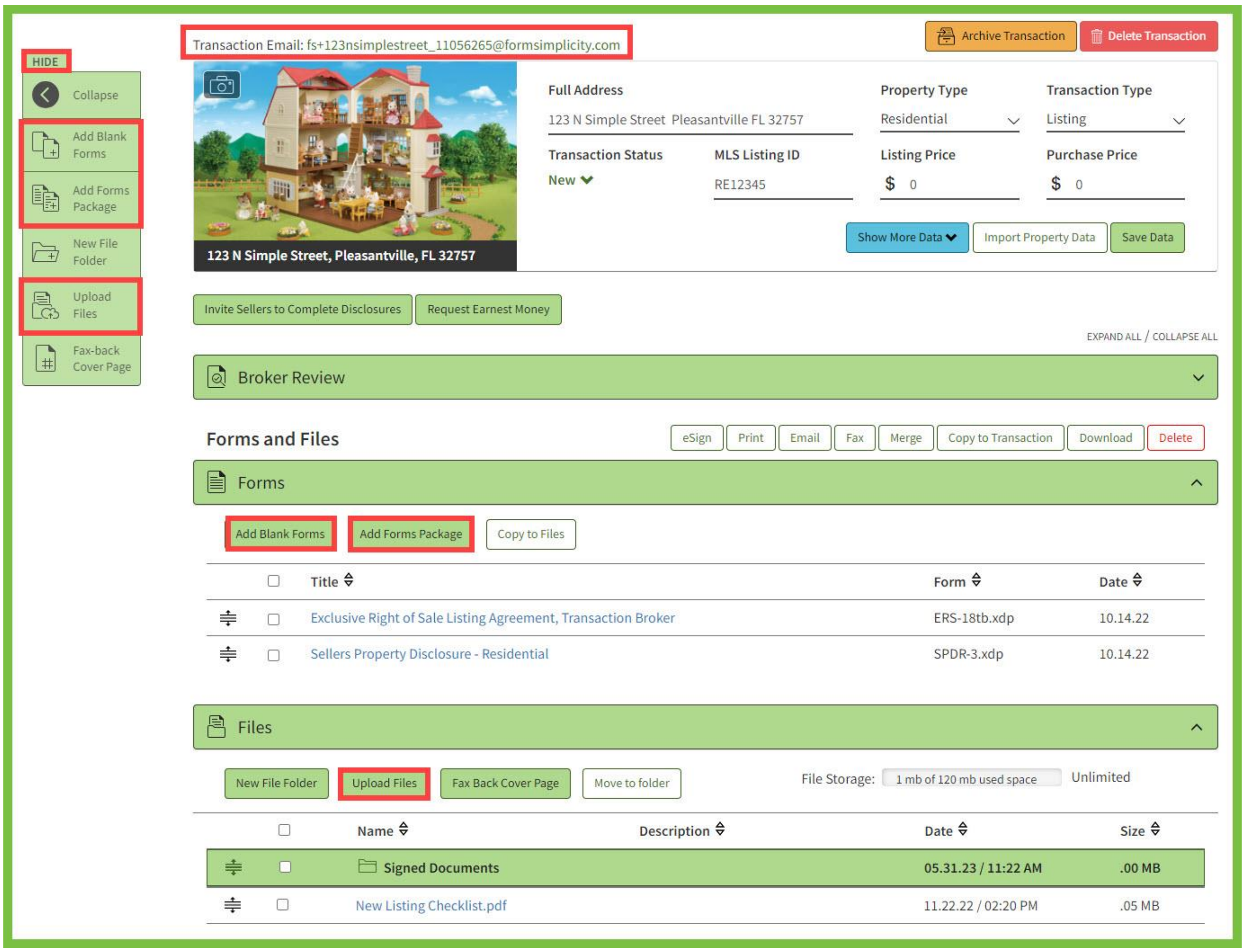
4. Then, click the **"Create Transaction"** button. If you wish to cancel, click on the **"X"** button in the upper right corner.



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.*

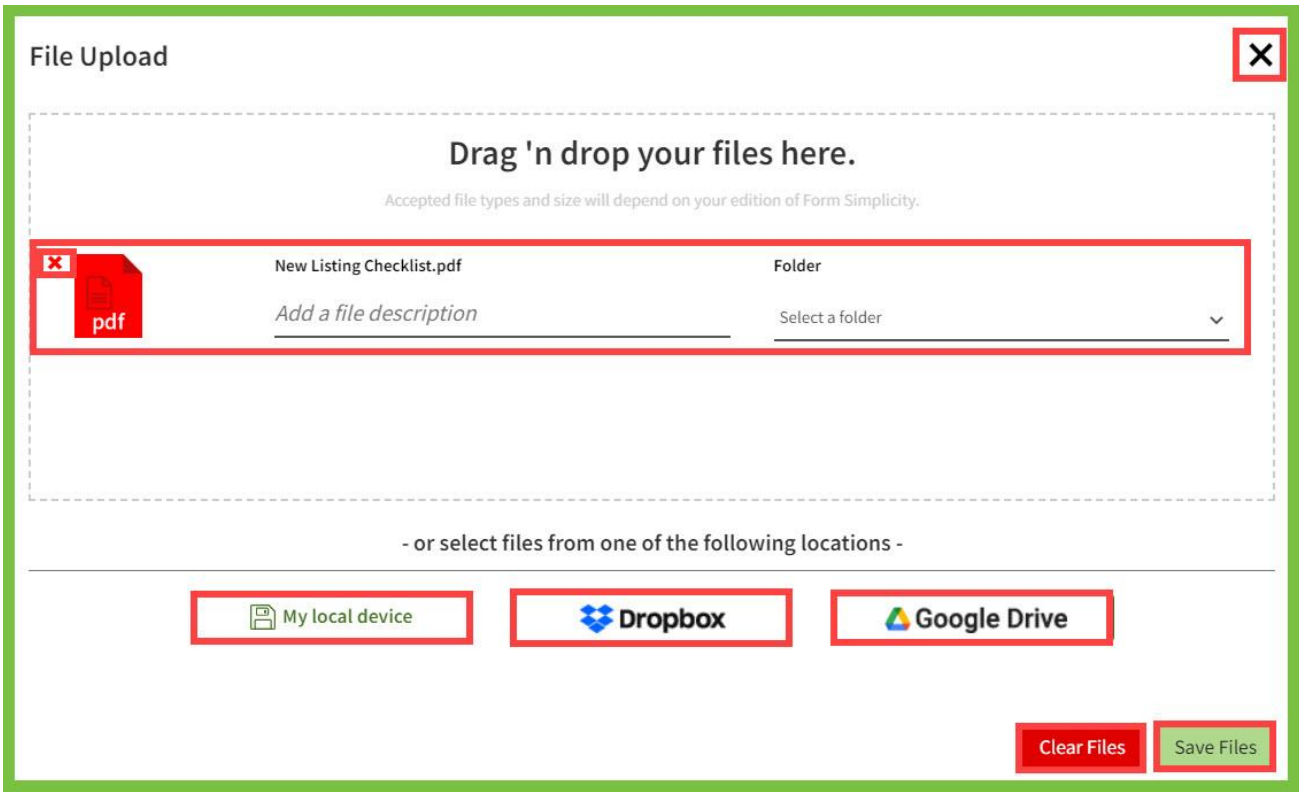
6. To add more forms to your transaction, click on either the **"Add Blank Forms"** button to select forms from the ***Forms Library*** or **"Add Forms Package"** button to select forms from the ***Brokerage-wide*** or ***Personal Forms Packages***. You can also click on the **"Add Blank Forms"** or 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.*



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.*



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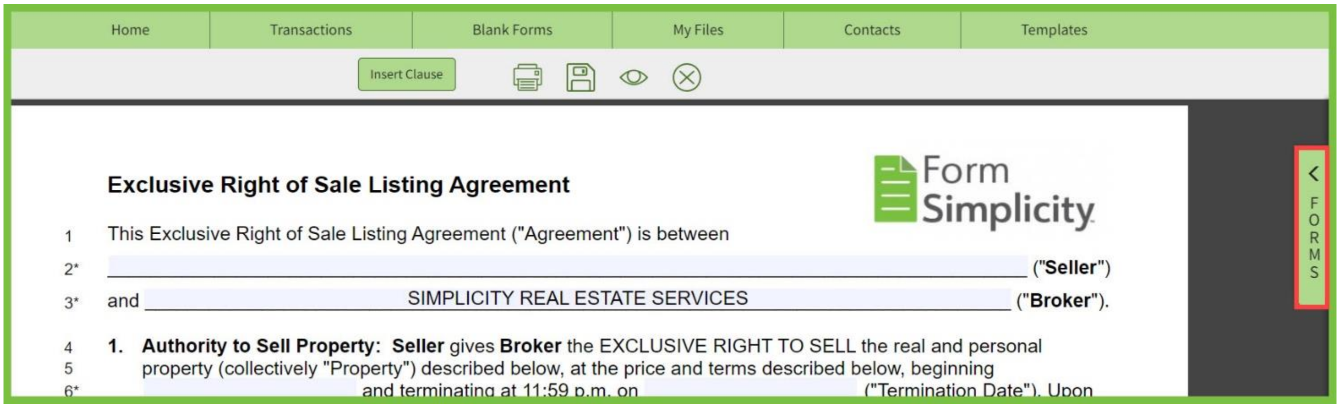
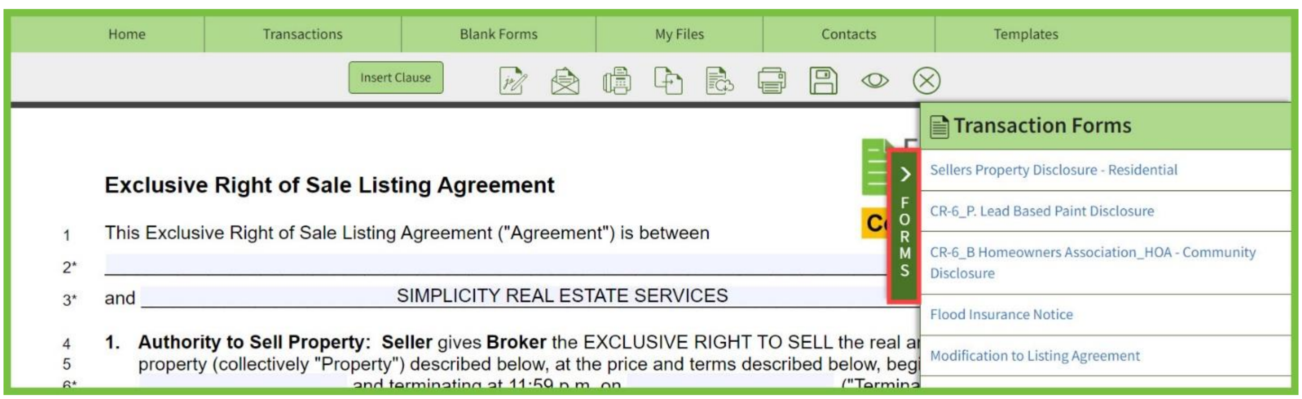
Transactions: Form Display Side-Menu Panel

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.

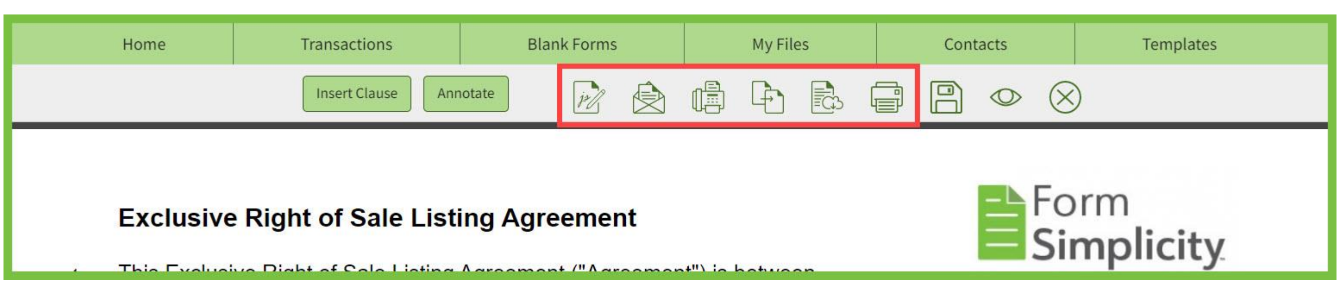


1. Click on the ***FORMS*** tab to expand or collapse the Transaction Forms selection menu.
2. Clicking on any form within the Forms menu will close the currently opened form and open the selected form.
3. If any changes were made to the currently opened form, users will be prompted to save those changes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



Transactions: Form Display Command Toolbar

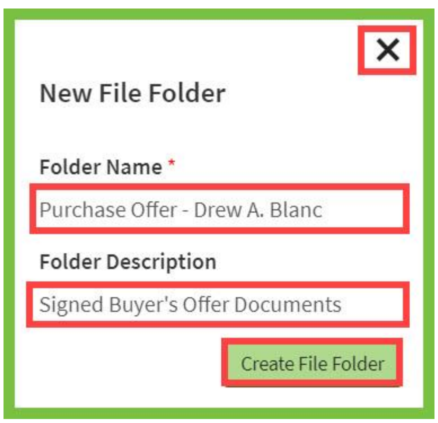
The Transaction Details Forms Display Toolbar contains commands to reduce steps and make it easier to work with forms. The select command options allow the user to execute these commands from within an open form.



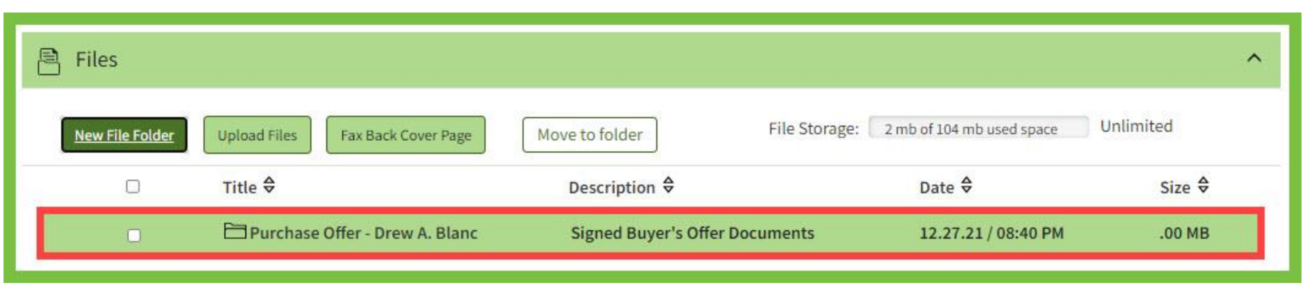
Transactions: Create a Transaction File Folder

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***.

2. 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.



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

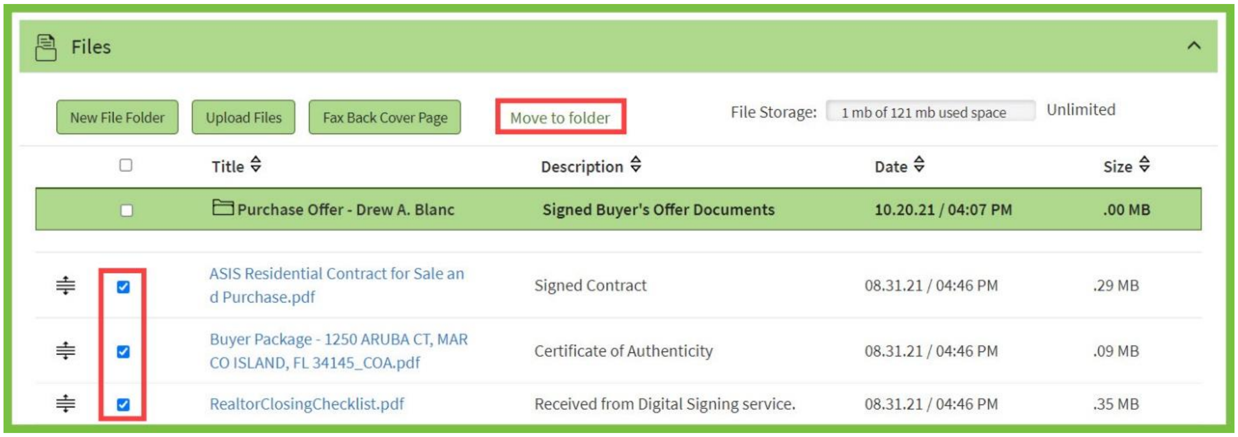


4. To edit a ***File Folder*** title, an **edit icon** when the mouse is hovered over the table data cell element that contains the folder icon and name, after and in line with the folder name. Clicking on the icon will open the ***Edit Folder*** pop-up window.

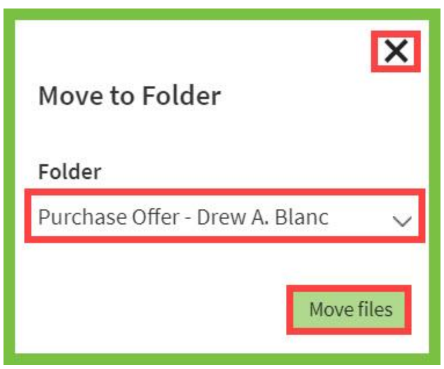
Transactions: Add Files to a Transaction Folder

I. Move to folder Button

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



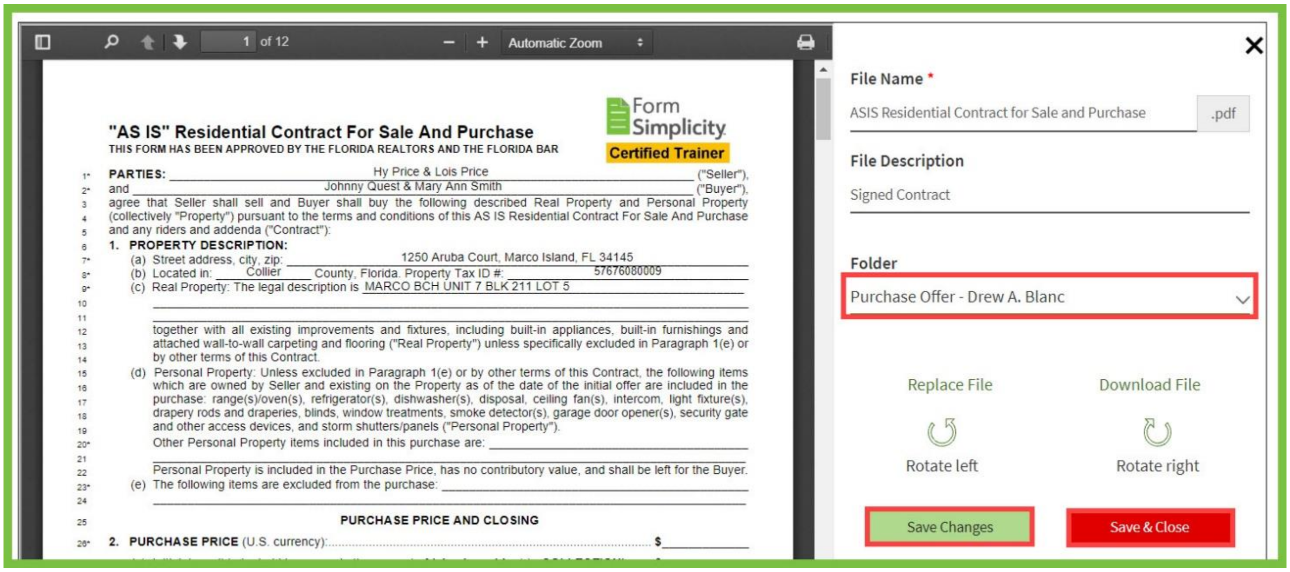
2. When the ***Move to folder*** pop-up window appears, select the folder to move the files into. Click the **"Move to folder**" button.



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.

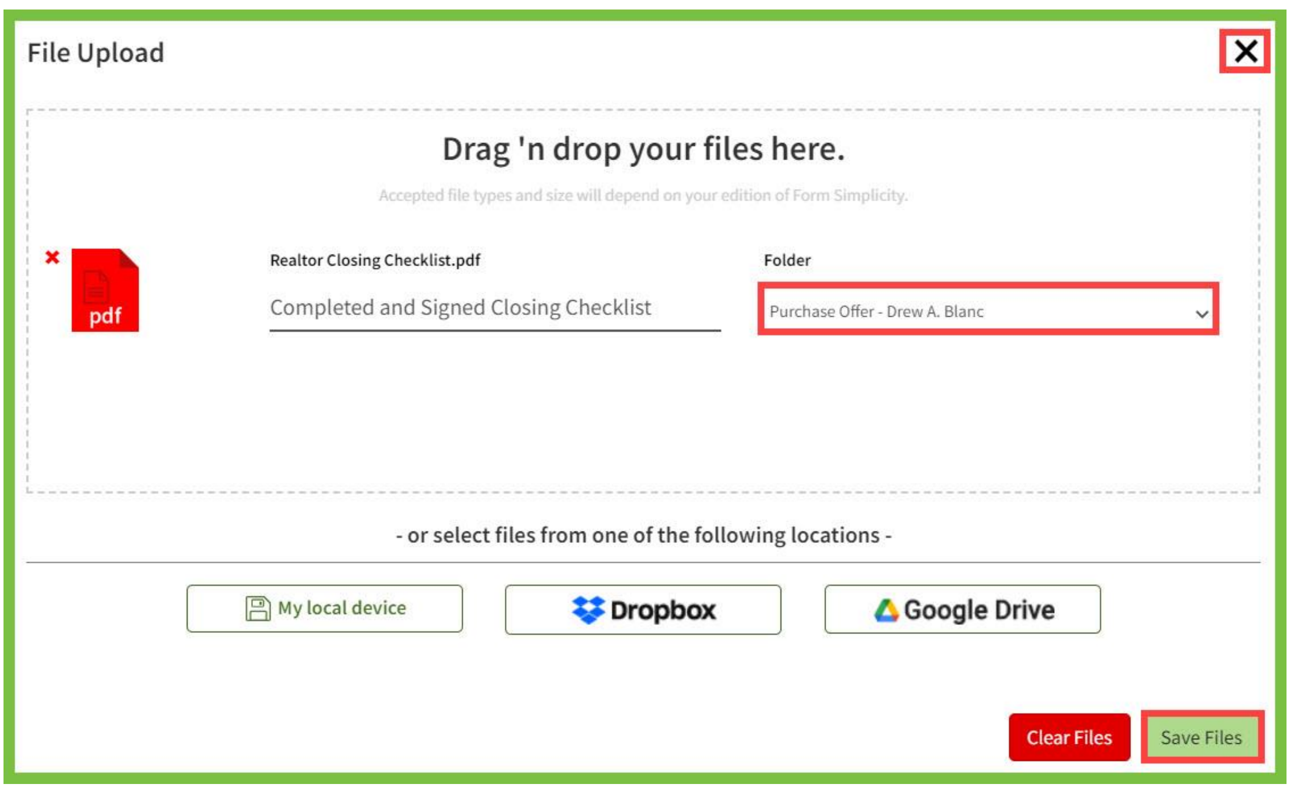
II. PDF File Viewer

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.



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.



IV. Drag and Drop Function

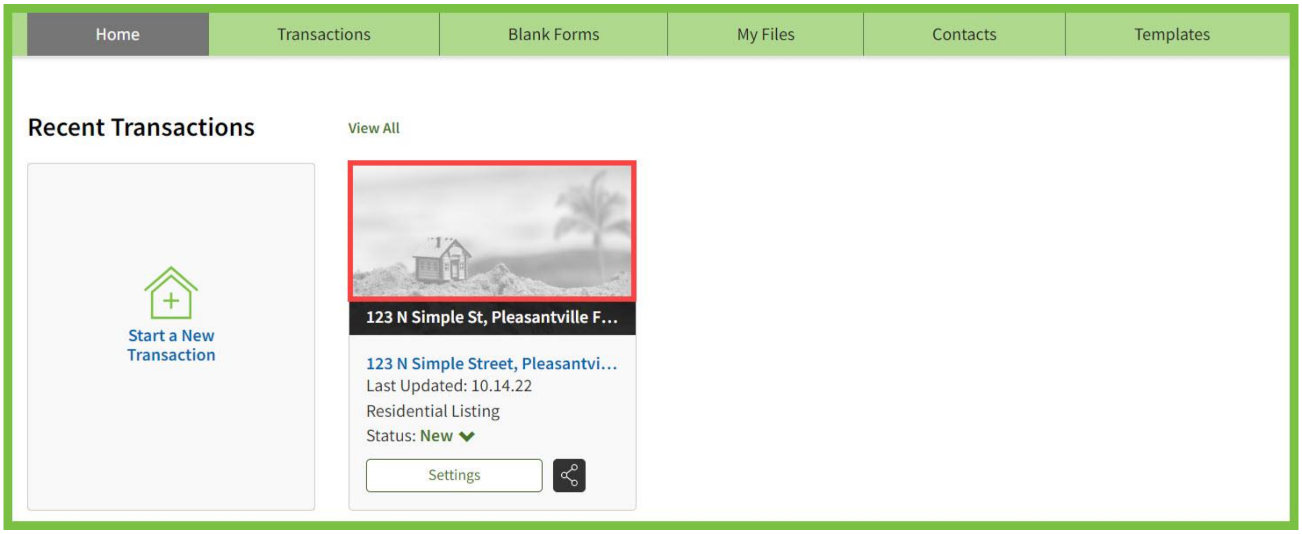
This allows the agent to sort folders, and to drag files into, out of, and within folders.

- 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**.

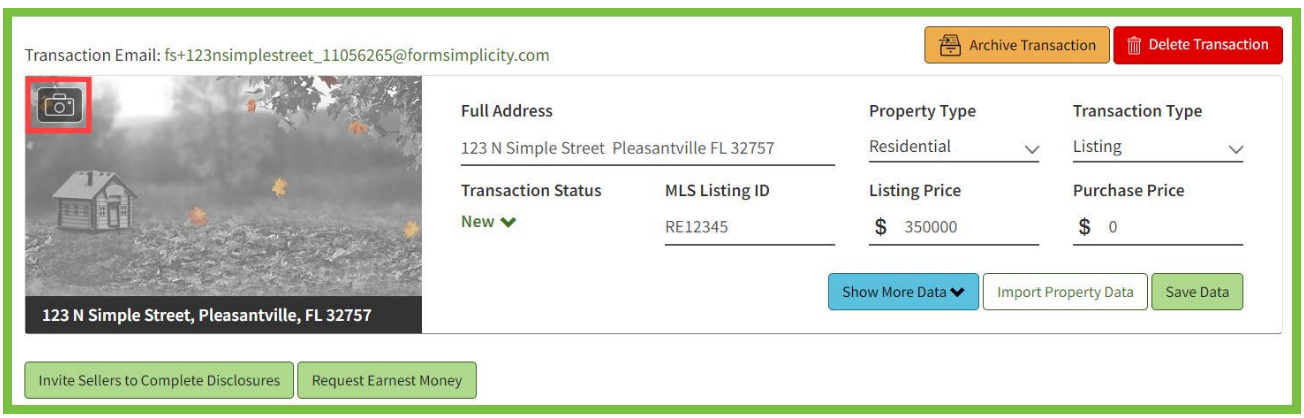
Notes:

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.



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



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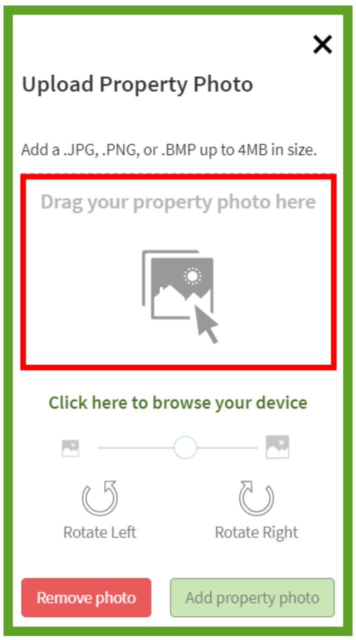
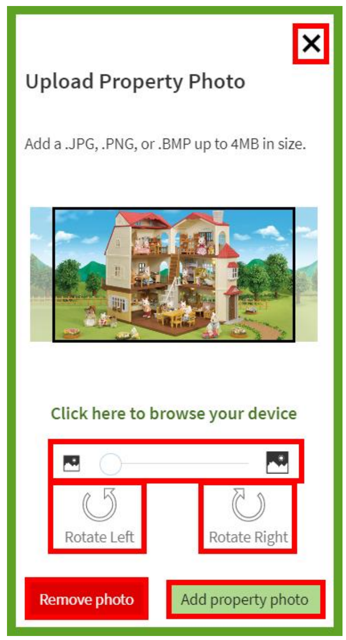
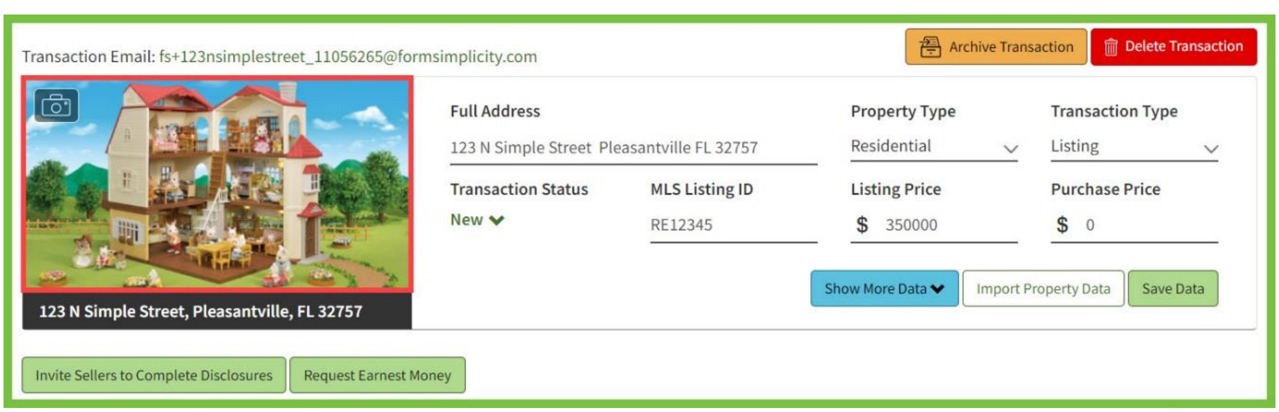
3. In the ***Upload Property Photo*** pop-up window:
   a. Click on the **"Click here to browse your device"** link to locate your property photo on your device. Select the photo and click on the **"Open"** button on the browser's ***Open*** window. *Note: You can also Drag and Drop your photo into the 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.

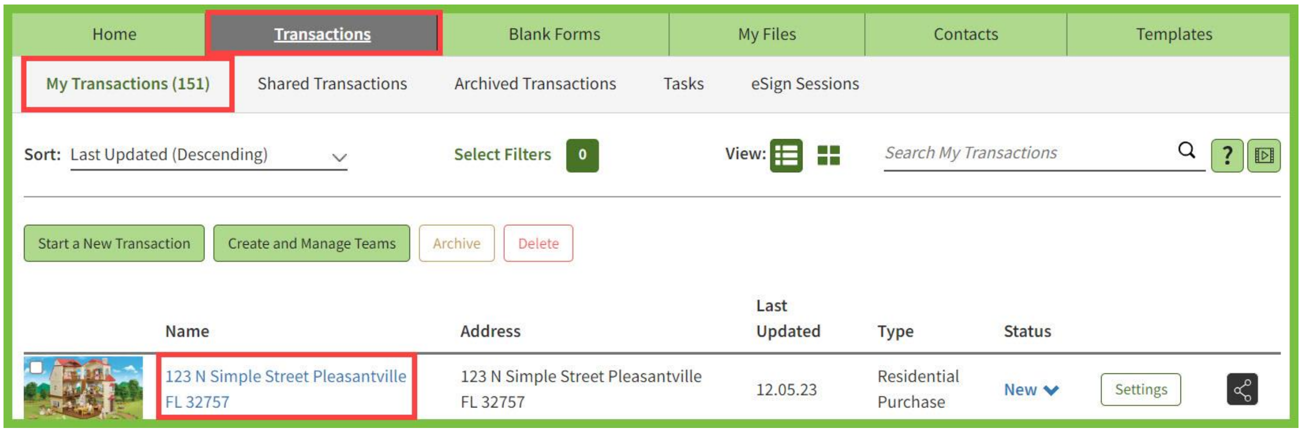
5. The property photo appears in the transaction.



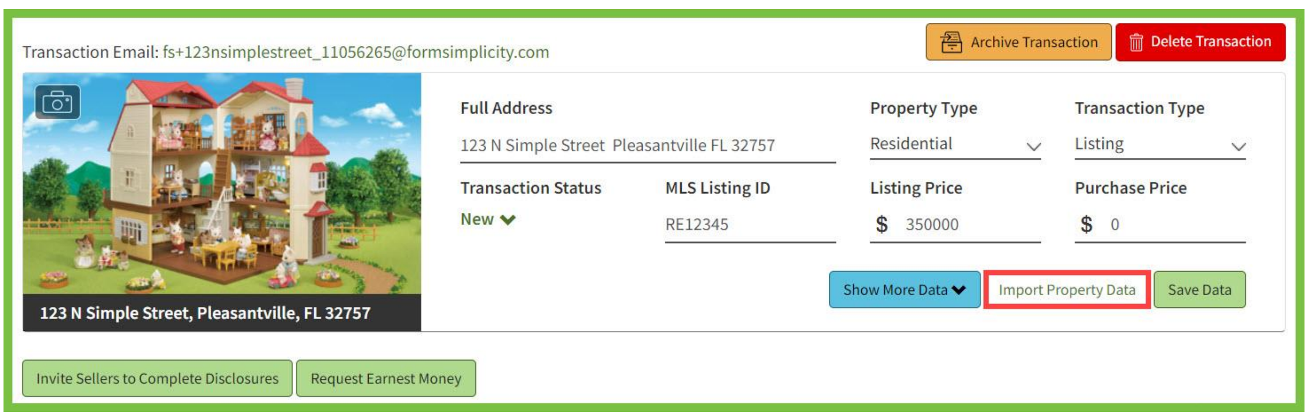
Transactions: Import Property Data – MLS Information

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

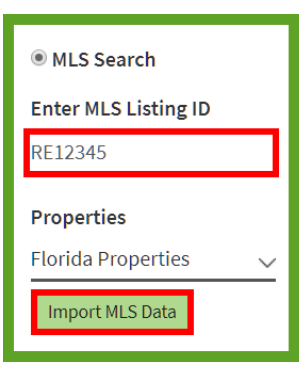
1. Log in and either from the home screen or from **"My Transactions"** from the ***Transactions*** main navigation menu, click on the transaction you wish to import MLS data.



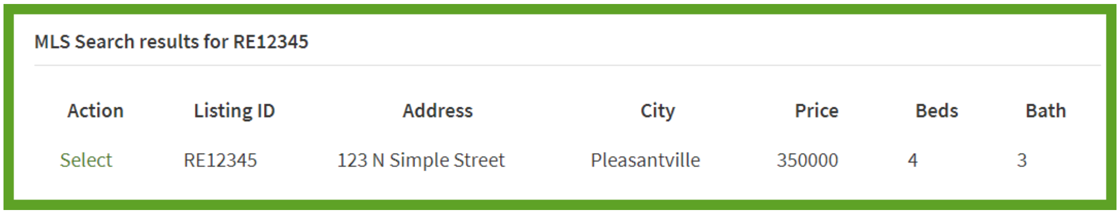
2. At the transaction screen, click on the **"Import Property Data"** button.



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



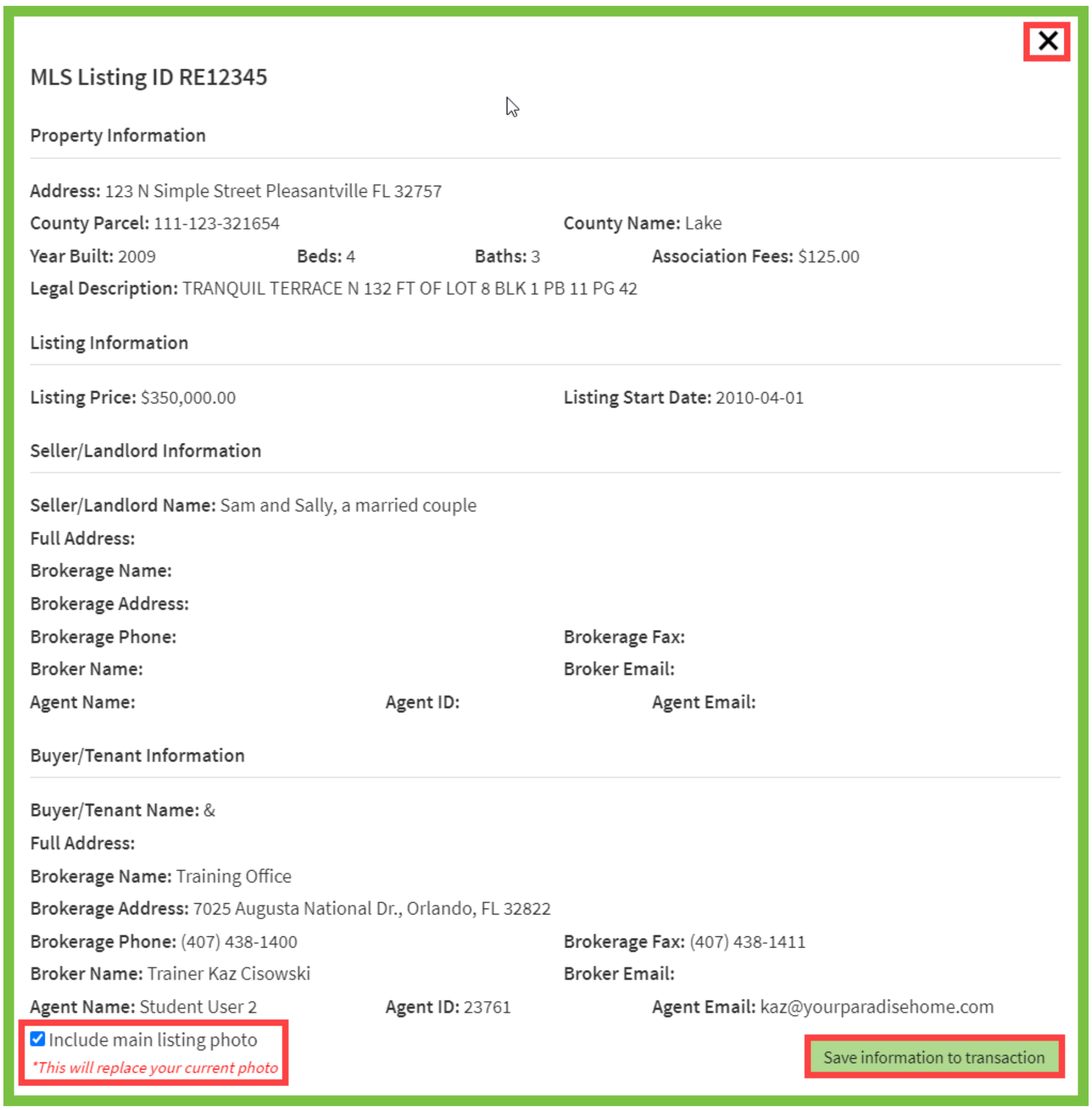
4. If it has been listed in MLS, your search results will appear. Click on **“Select”** to display the MLS information.



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.



MLS Listing ID RE12345

Property Information

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

Listing Information

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

Seller/Landlord Information

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

Buyer/Tenant Information

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

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

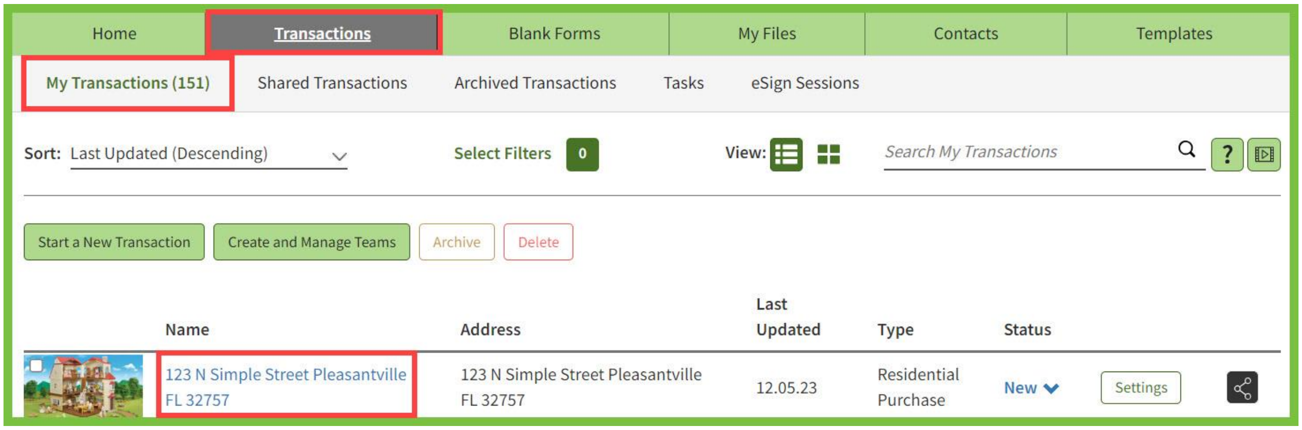
Save information to transaction

6. This will save the listing data and the listing photo (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.

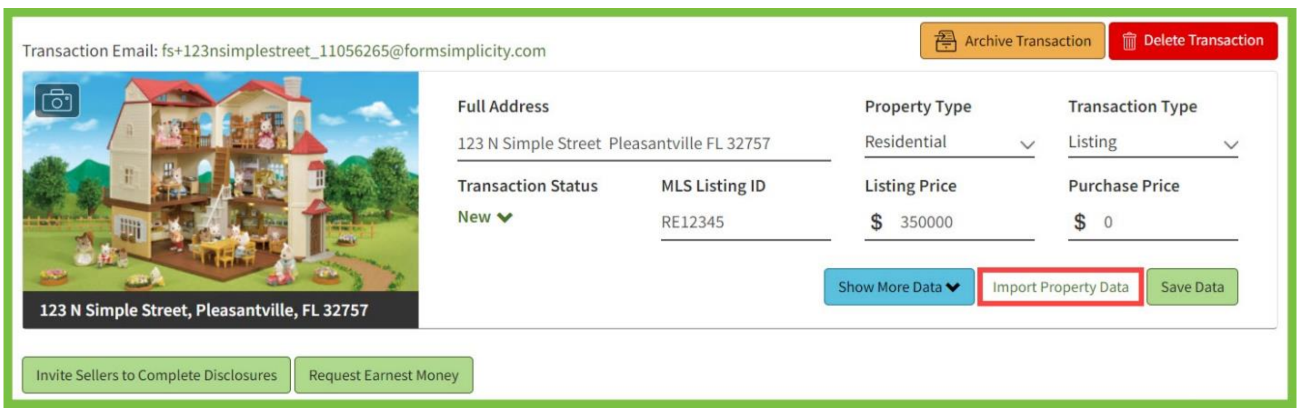
Transactions: Import Property Data – Tax Information

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.

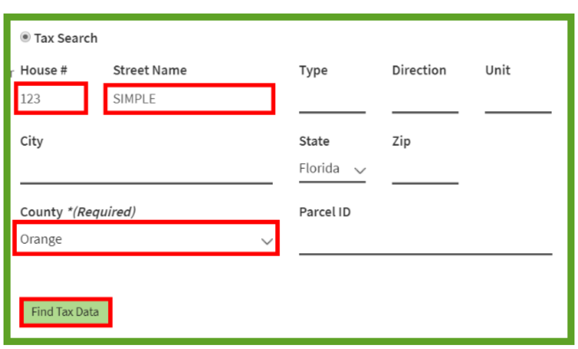
1. Log in and either from the Form Simplicity home screen or click on **"My Transactions"** from the ***Transactions*** main navigation menu, click on the transaction you wish to import tax data.



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



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



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

Tax Search results for 123 SIMPLE ST, FL

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

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

Tax Search results for 123 N Simple Street

Property Information

Address: 123 N Simple Street, Pleasantville FL 32757
County Parcel: 09-21-28-0196-10-172 **County Name:** ORANGE
Year Built: 2016 **Beds:** 0 **Baths:** 0 **Association Fees:**
Legal Description: TOWN OF APOPKA A/109 THE S1/2 LOT 17 (LESS HIWAY) & (LESS BEG NE COR OF S1/2 OF LOT 17 BLK A RUN S 90 FT W 68.9 FT N 37 DEG E 70.4 FT N 34 FT E 26 FT TO POB) BLK A

Seller/Landlord Information

Seller/Landlord Name: AL GORITHEM AND OLGA RITHEM
Full Address: 123 N SIMPLE STREET, PLEASANTIVILLE, FL 32757
Brokerage Name:
Brokerage Address:
Brokerage Phone: **Brokerage Fax:**
Broker Name: **Broker Email:**
Agent Name: **Agent ID:** **Agent Email:**

Buyer/Tenant Information

Buyer/Tenant Name: &
Full Address:
Brokerage Name:
Brokerage Address:
Brokerage Phone: **Brokerage Fax:**
Broker Name: **Broker Email:**
Agent Name: **Agent ID:** **Agent Email:**

Save information to transaction

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

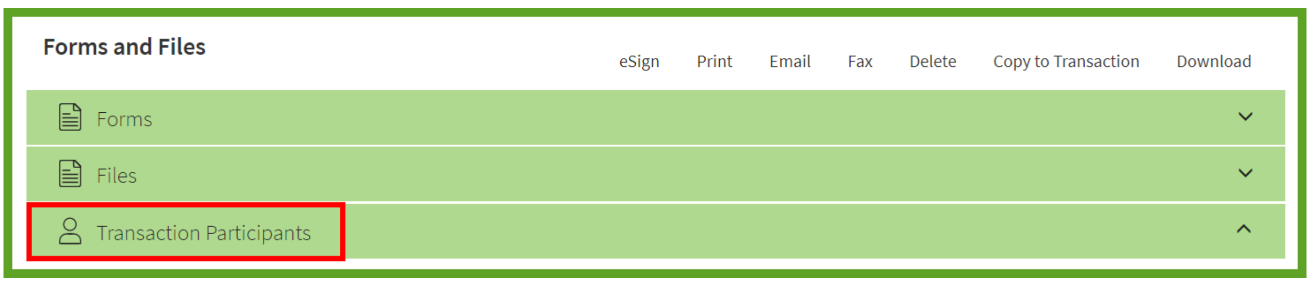
Transactions: Transaction Participants

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

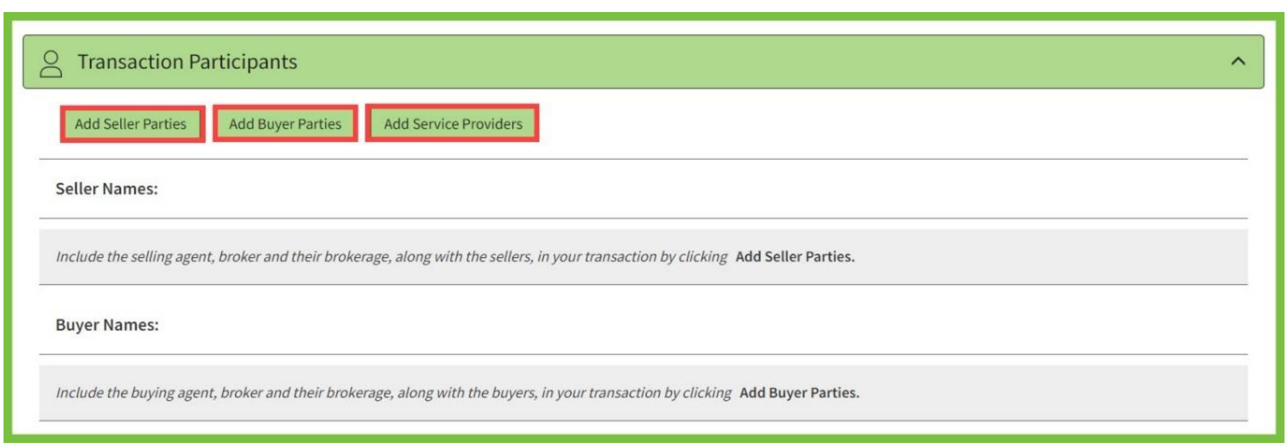
1. Add a New Form Simplicity Contact by either clicking on the **"Add a Contact"** button in the ***Useful Tools*** section or by clicking on **"Contacts"** on the main navigation menu which will automatically go to the ***People*** section, then click on the **"New Contact"** button.

2. Click on the transaction to open it.

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

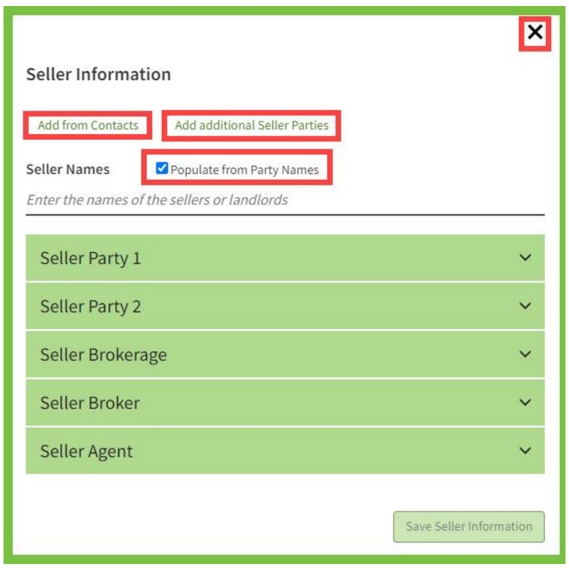


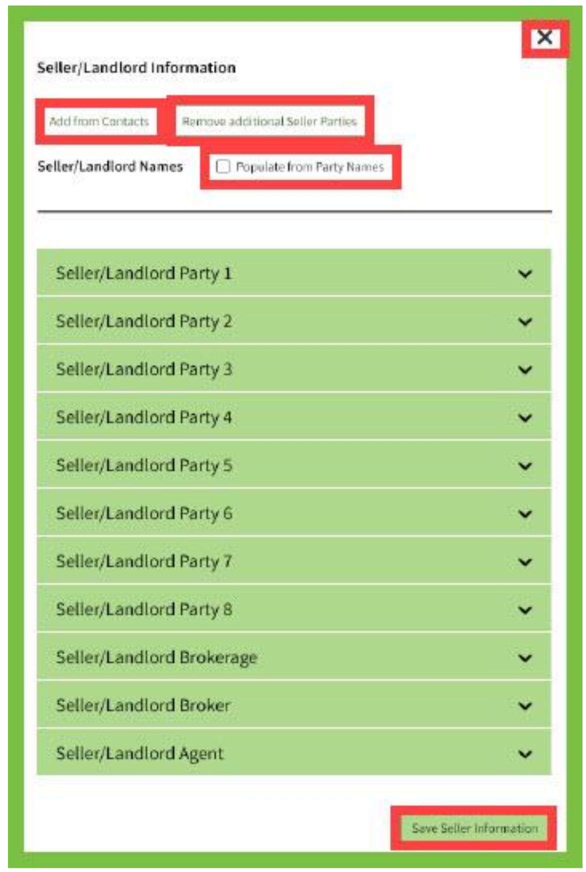
4. Once the ***Transaction Participants*** section is expanded, click on either "**Add Seller Parties**", "**Add Buyer Parties", or "Add Service Providers."**

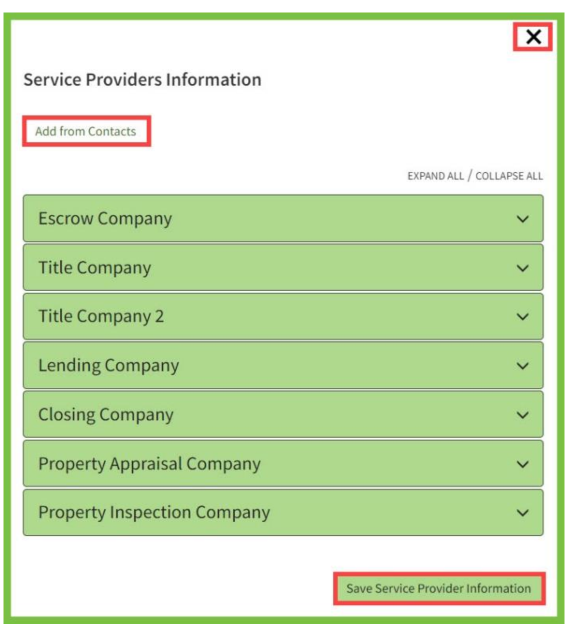


5. The ***Seller Information/Buyer Information*** pop-up window will appear. By clicking on the **"Add additional Seller Parties/Add additional Buyer Parties"** button, you will add an additional 6 parties for each side. Removing the additional signer fields when they contain information will not clear 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.**"

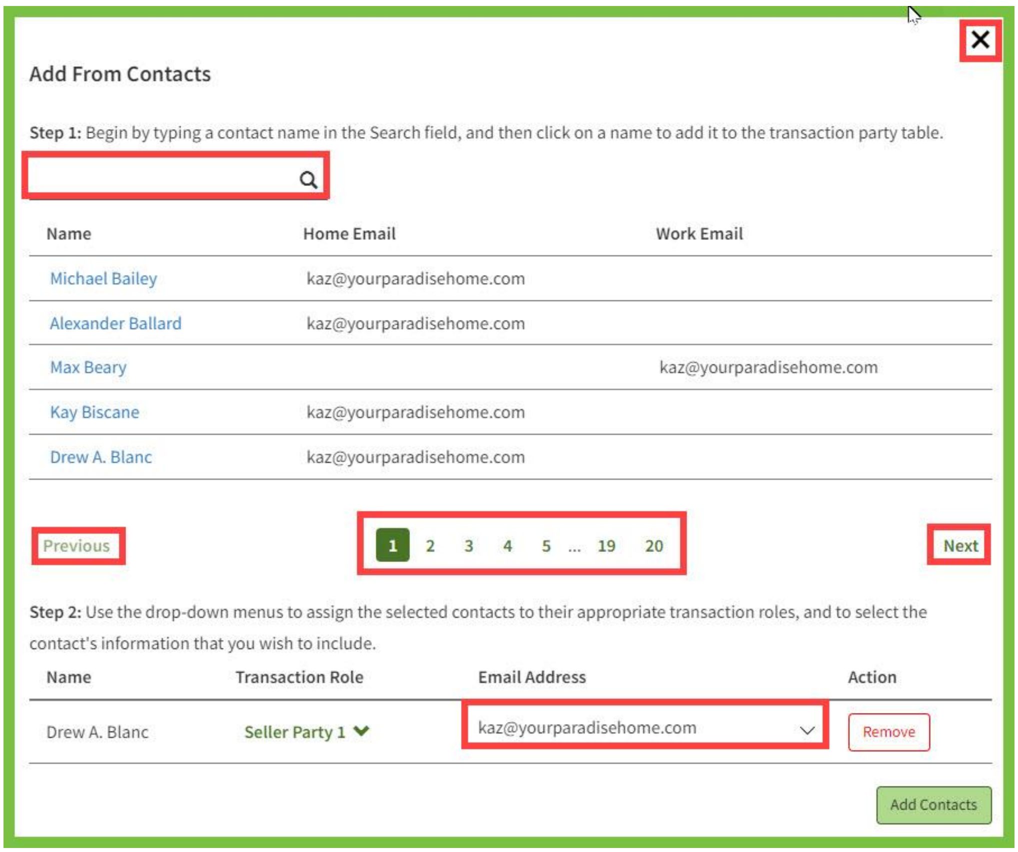
   The users have the ability to add Service Providers to the ***Transaction Participants*** section of the transaction details page, e.g. Escrow Company, Title Company, Lending Company, Closing Company, Property Appraisal Company, Property Inspection Company.





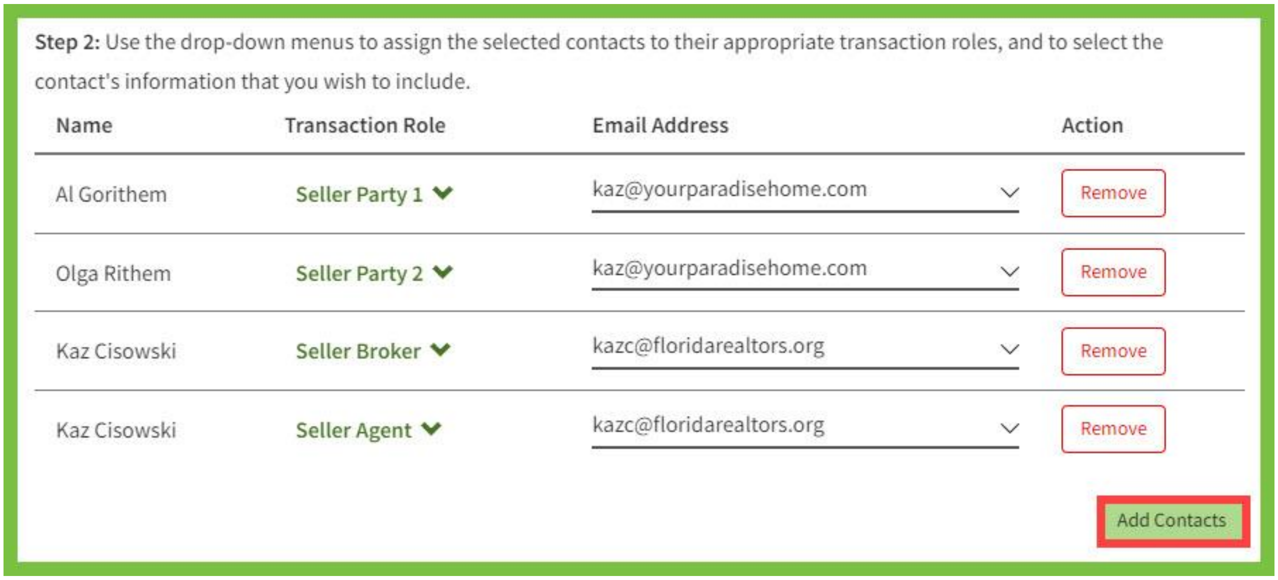


6. After clicking on the **"Add from Contacts"** button, you will be directed to the ***Add From Contacts*** pop-up window. In the ***Add From Contacts*** pop-up window under Step 1, search for the contact(s) you would like to add. You can type in the name of the contact in the search area, select the 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.

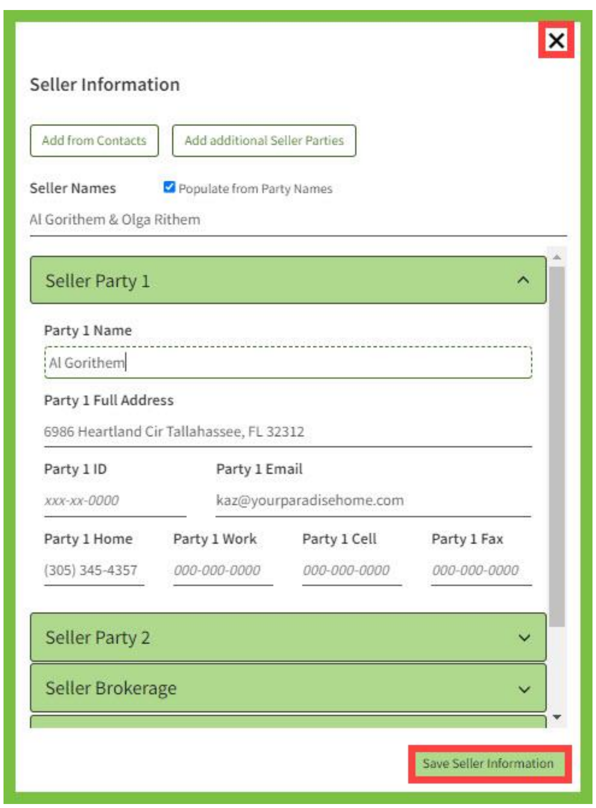


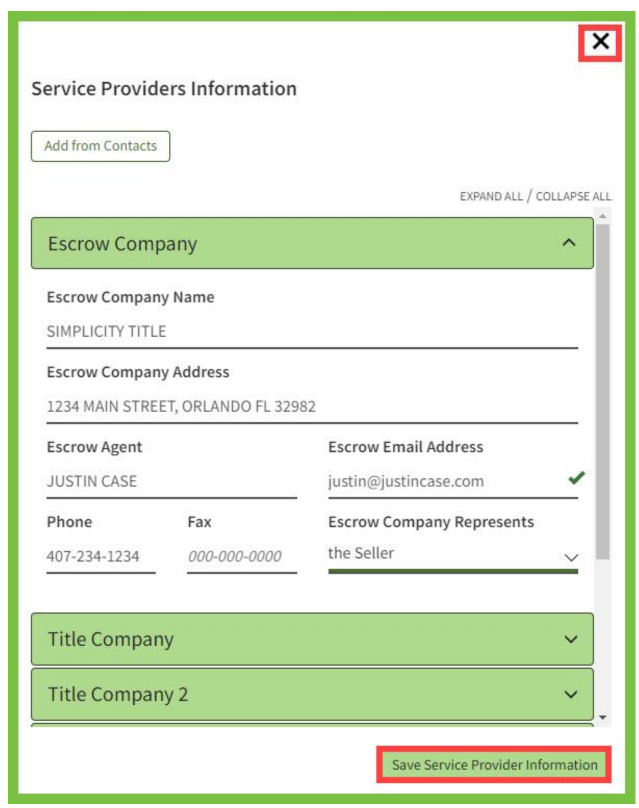
7. Select the **Transaction Role** from the ***Transaction Role*** drop-down menu to specify what transaction role should be assigned to the selected contact. Select the **Service Provider Type** from the ***Service Provider Type*** drop-down menu to specify what service provider type should be assigned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

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.



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.



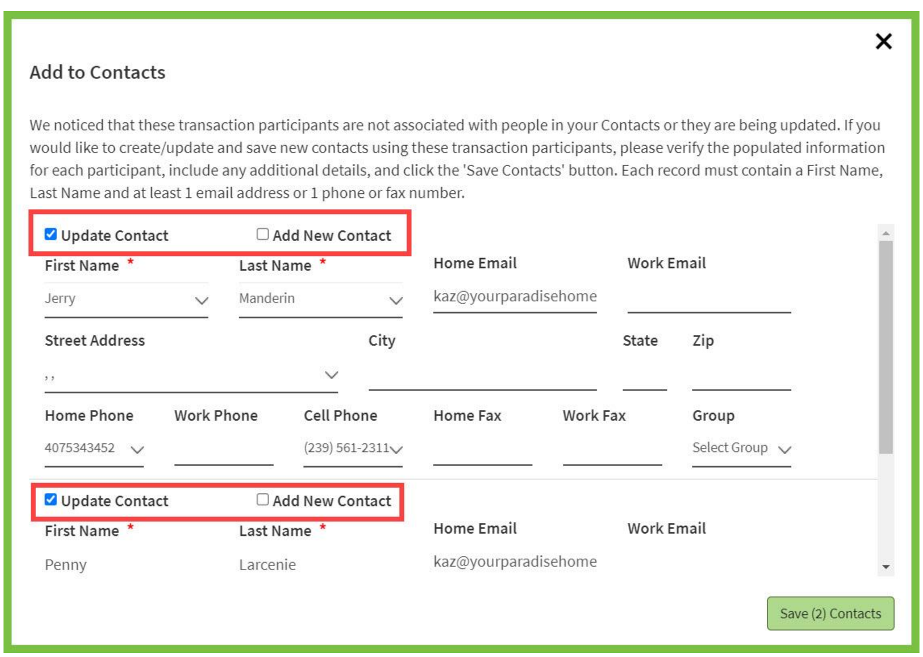


10. After clicking on the "**Save Seller (or Buyer) Information**" button on the bottom right, the ***Add to Contacts*** pop-up window will appear with the option to save new transaction participants to their Form Simplicity Contacts page, AND the option to update Contact records if the contact information was updated in the transaction.

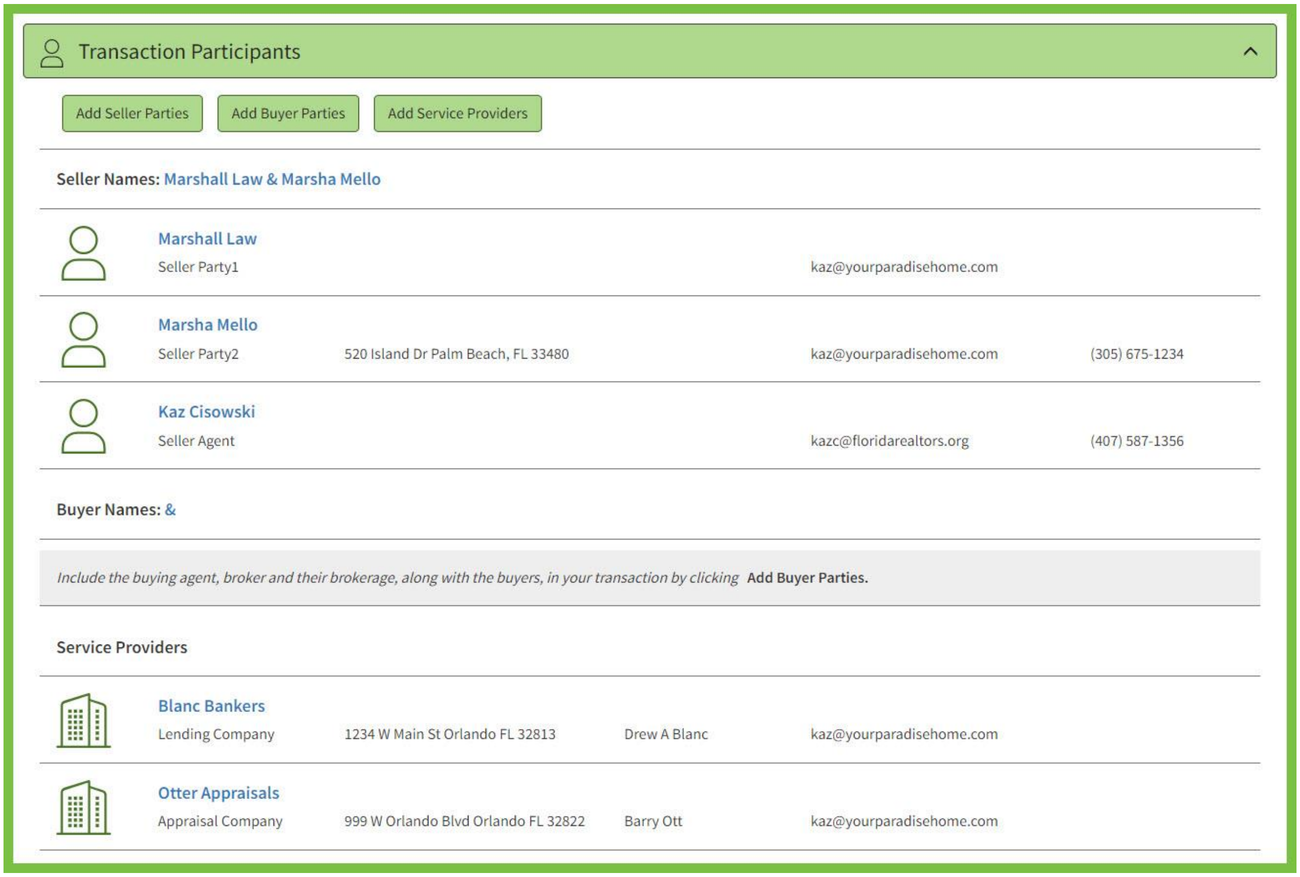
- **Update Contact:** If the participant already exists in the Contact record and a change or update to the information is detected, the user will have the option to Update Contact (default) or Add New Contact.
    - Any field where a change has been detected will be displayed as a select drop-down that 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.



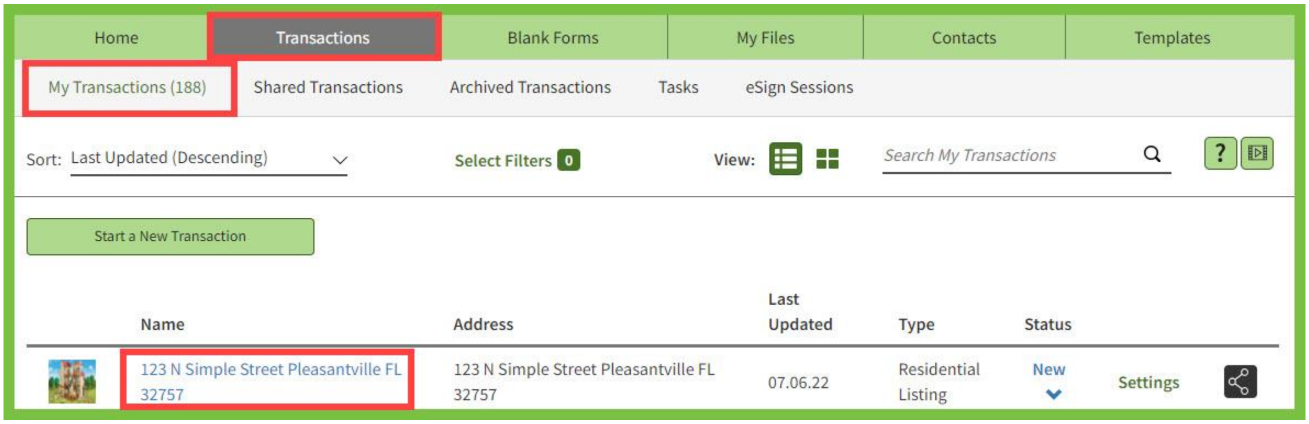
11. All the **Seller Parties** or **Buyer Parties** as well as the **Service Providers i**nformation will appear in the ***Transaction Participants*** section of the Transaction Details Page.



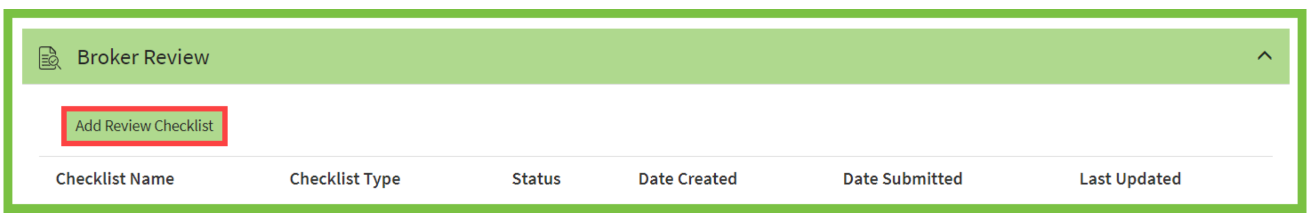
Notes:

Transactions: Broker Review

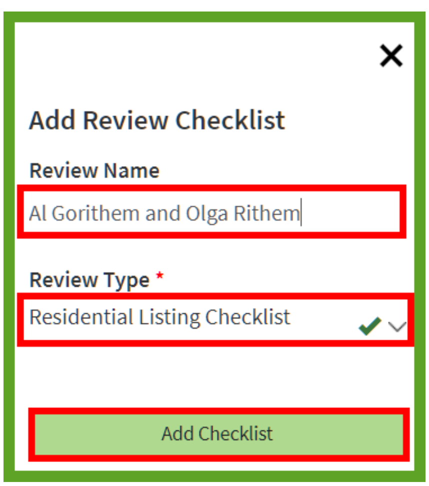
1. Log in and click on **"Transactions"** on the main navigation menu at the top of the Form Simplicity home page. This will automatically open the **"My Transactions"** screen. Click on the transaction to open.



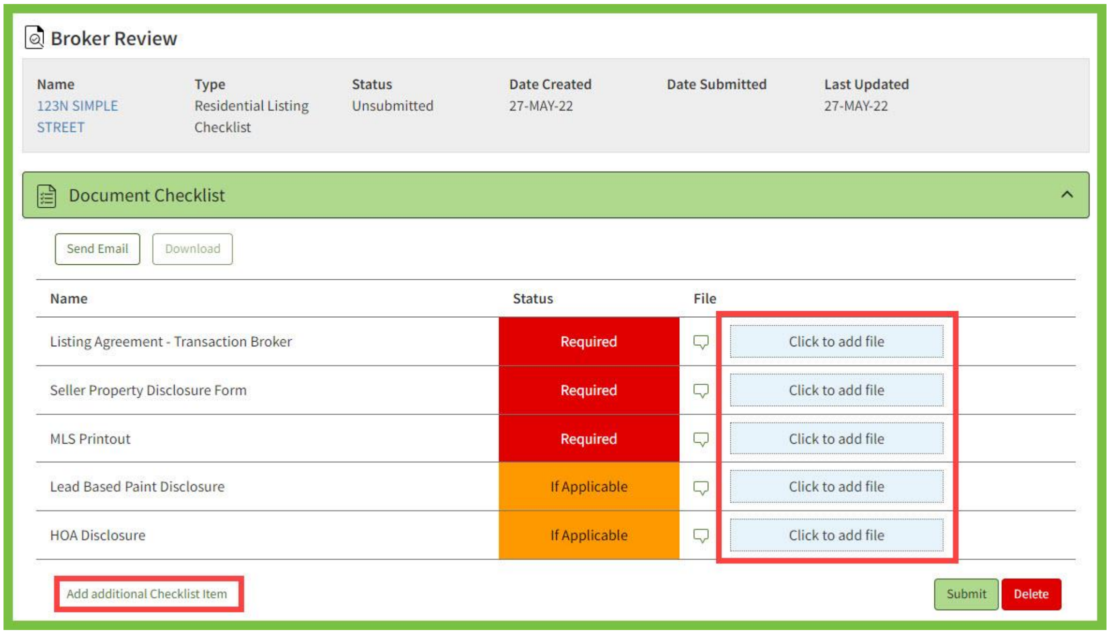
2. Then, click on the **"Add Review Checklist"** button in the ***Broker Review*** section. *Note: If there is no Broker Review section, then the broker has not created a transaction checklist.*



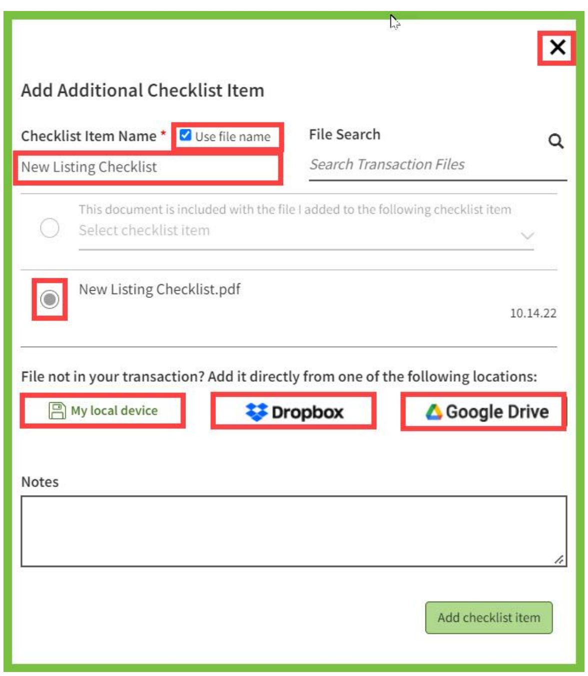
3. In the ***Add Review Checklist*** pop-up window, assign a **"Review Name"** for this review, select a **"Review Type"** from the drop-down menu and click on the **"Add Checklist"** button.



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.



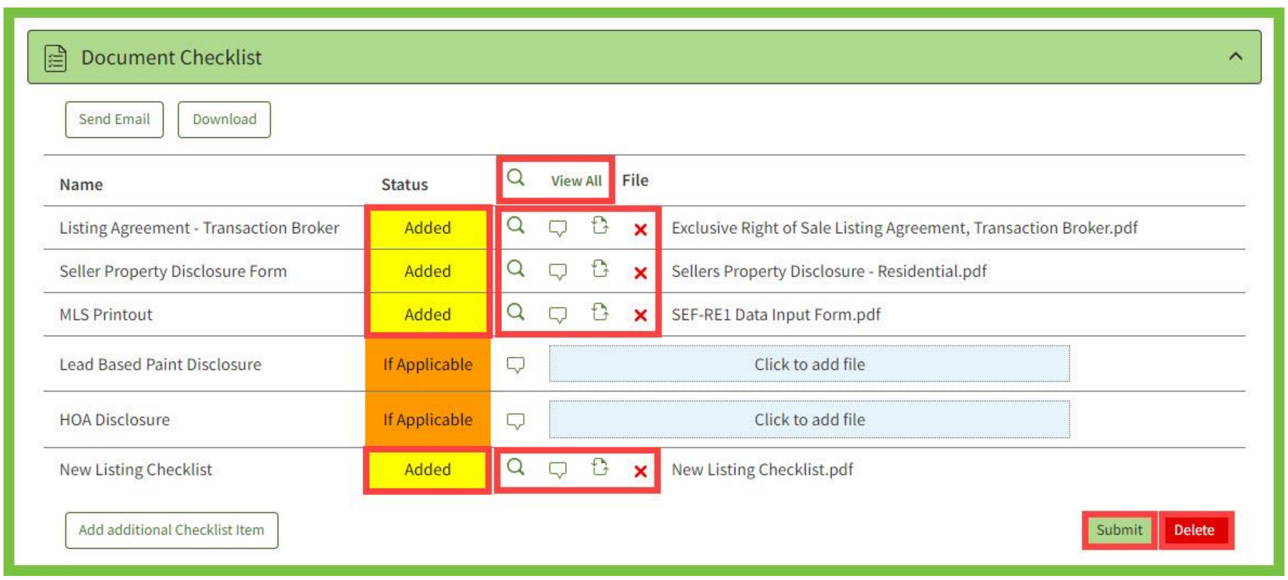
5. The **"Add additional Checklist Item"** button below the list of checklist items allows multiple files to be uploaded. This is for any additional transaction files that are not listed in the checklist. Enter the **"Checklist Item Name"** in the space below. If you want to have the Checklist item name 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.*



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.*



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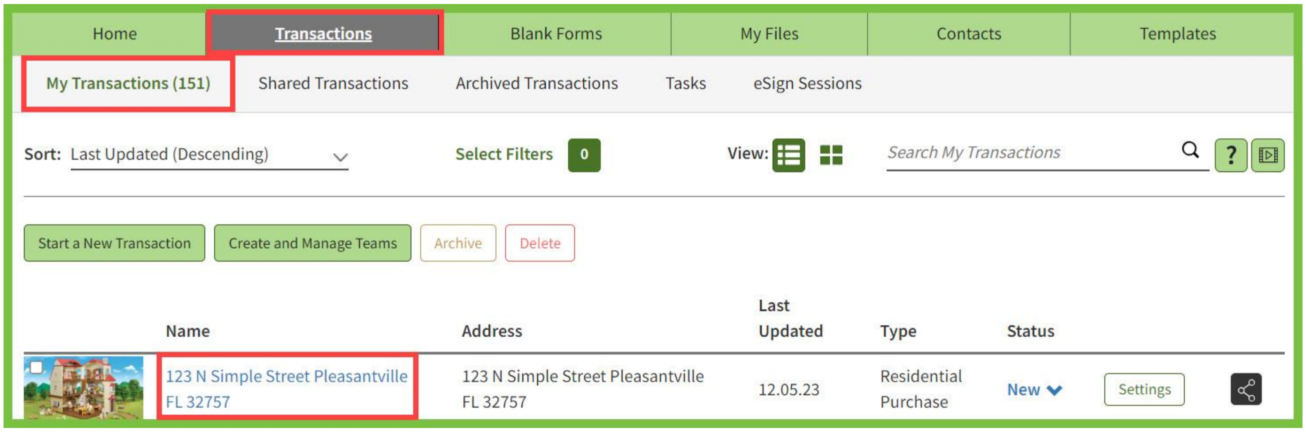
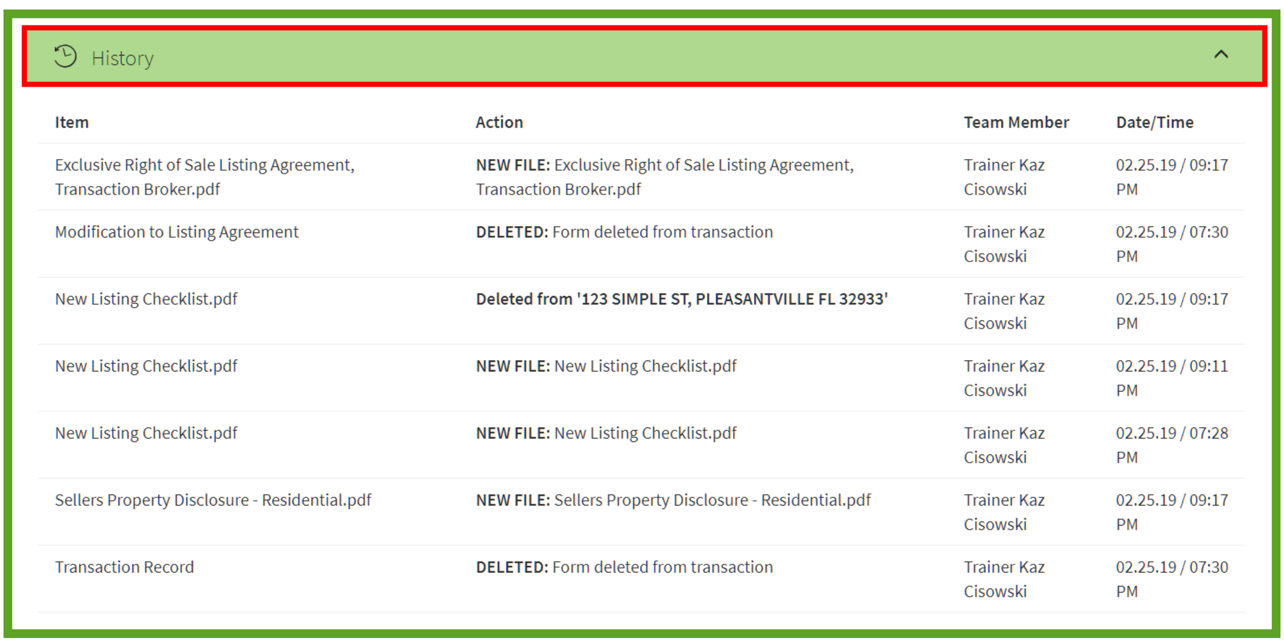
Transactions: History

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.



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.

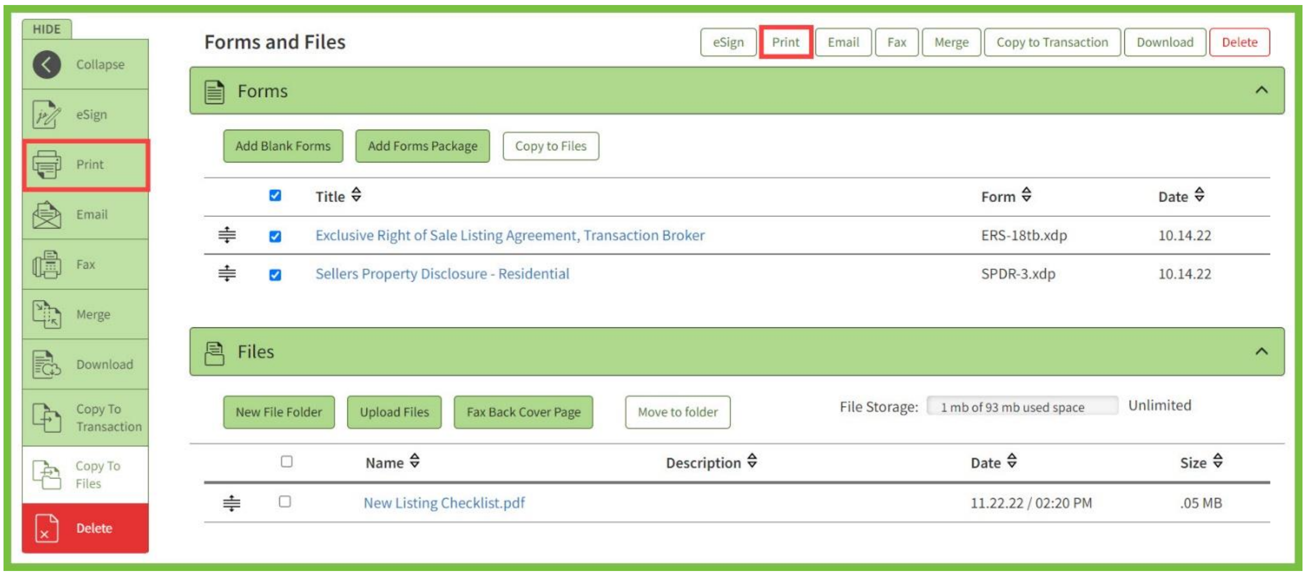


Transactions: Print Form(s) and/or File(s)

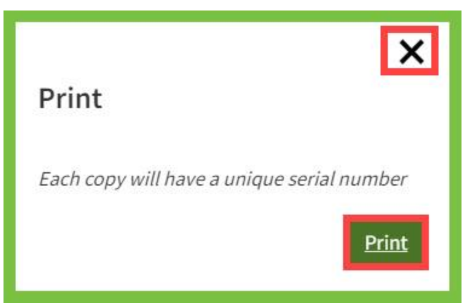
Print a form(s) and/or file(s) from a transaction when you need to work with a hard copy of the form(s) and/or file(s). For example: If you are working with a client who does not want to use eSign, you can print the required form(s) and/or file(s)for them to sign.

1. Log in and open the transaction.

2. Select the form(s) and file(s) that you would like to print by placing a check mark on the boxes next to them. Click on "**Print**" located to the right of the ***Forms and Files*** header or click on the **"Print"** button on the ***Primary Action Sidebar*** located on the left margin in the transaction details page.



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



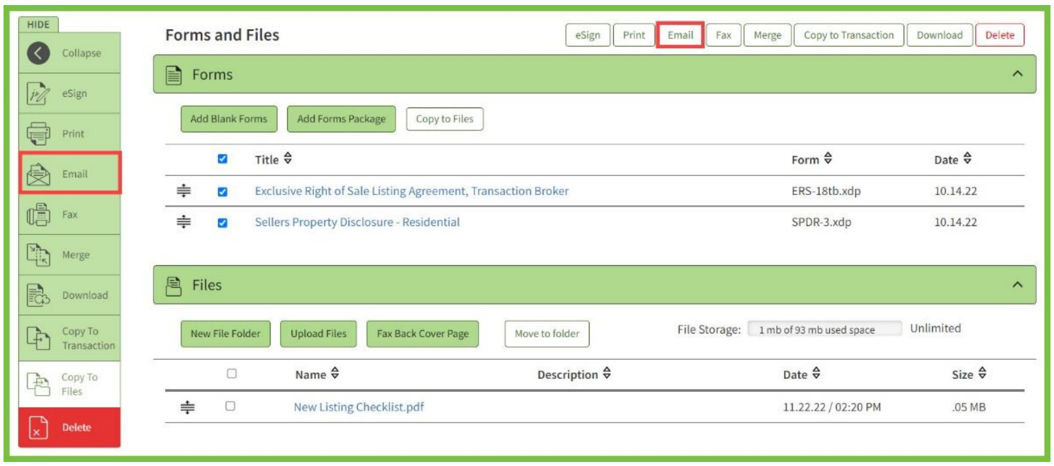
4. A PDF viewer will open showing the form(s) and/or file(s) to print. The ***Print*** dialog pop-up window automatically appear. Choose the ***Printer Destination***, ***Pages to print***, ***how many Copies***, and any additional settings. Click on the **"Print"** button to proceed. Click on the **"Cancel"**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

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

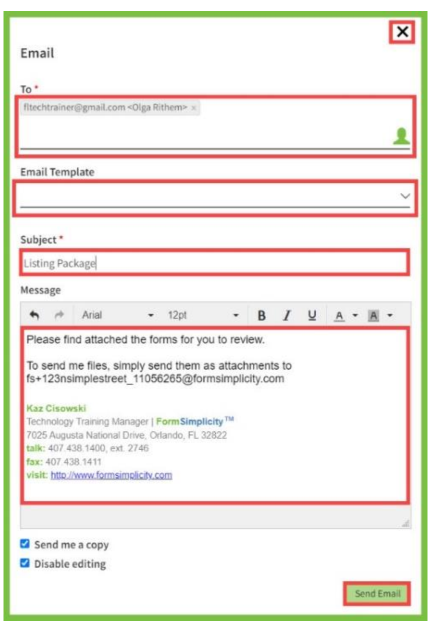
Email form(s) and/or file(s) from a transaction when you need to work with a hard copy of the form(s) and/or file(s). For example: If you are working with an out-of-town client who does not want to use eSign, you can email the required form(s) and/or file(s) for them to sign by hand.

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.



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.

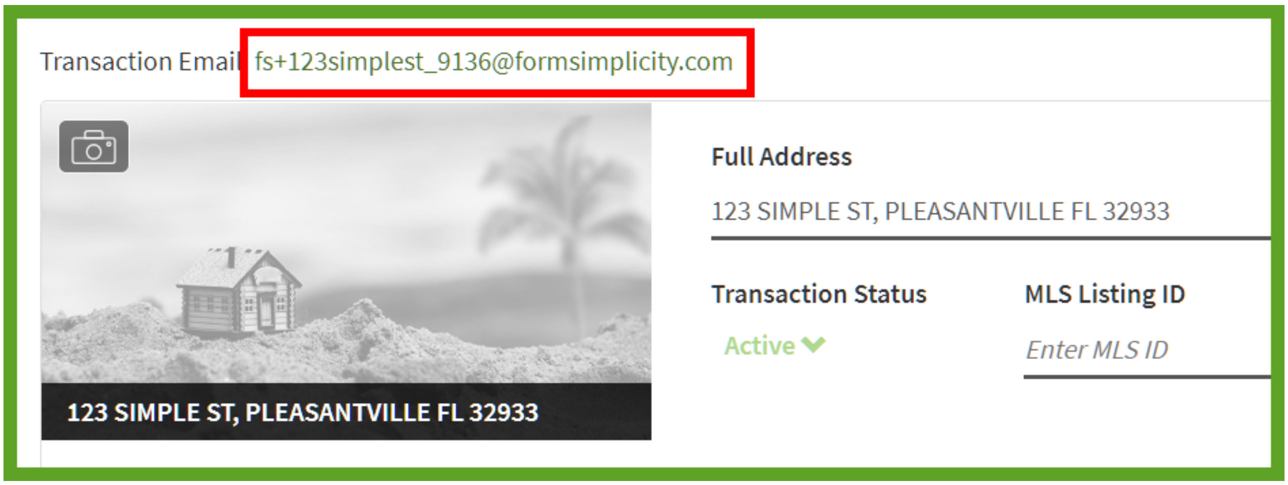


Email to Your Transaction

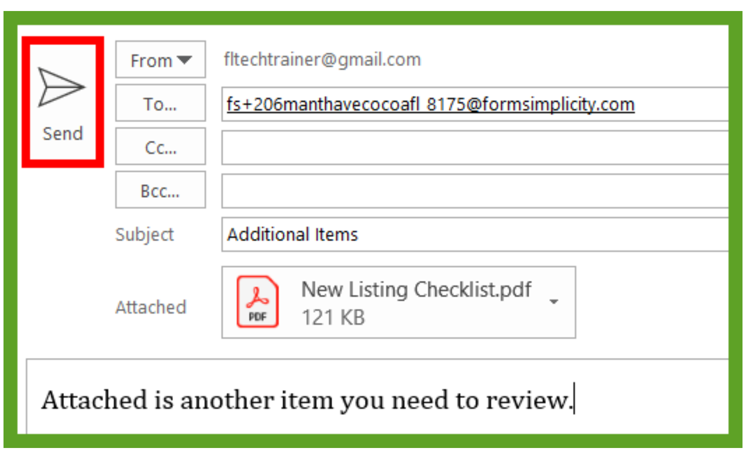
1. Open the transaction.

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

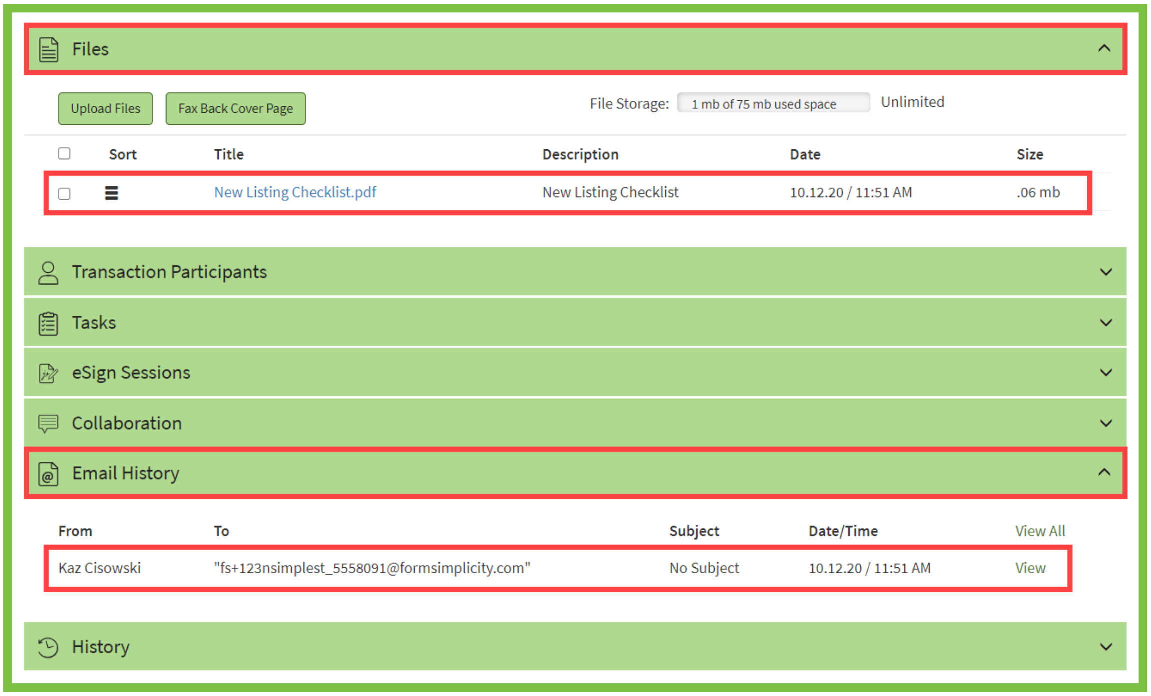
   Note: You may also give your clients this Email address for them to send emails directly to the transaction, or you may use it in the cc field if you are emailing your clients directly from your own Email application.



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

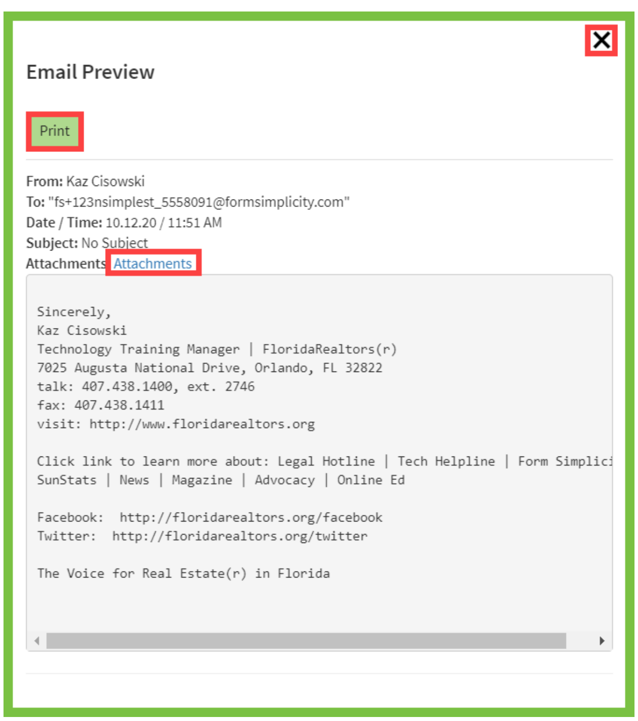


4. The attached file that was emailed will appear under the ***Files*** section of the transaction. The complete Email with attached file will appear in the Email History section of the transaction.



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.

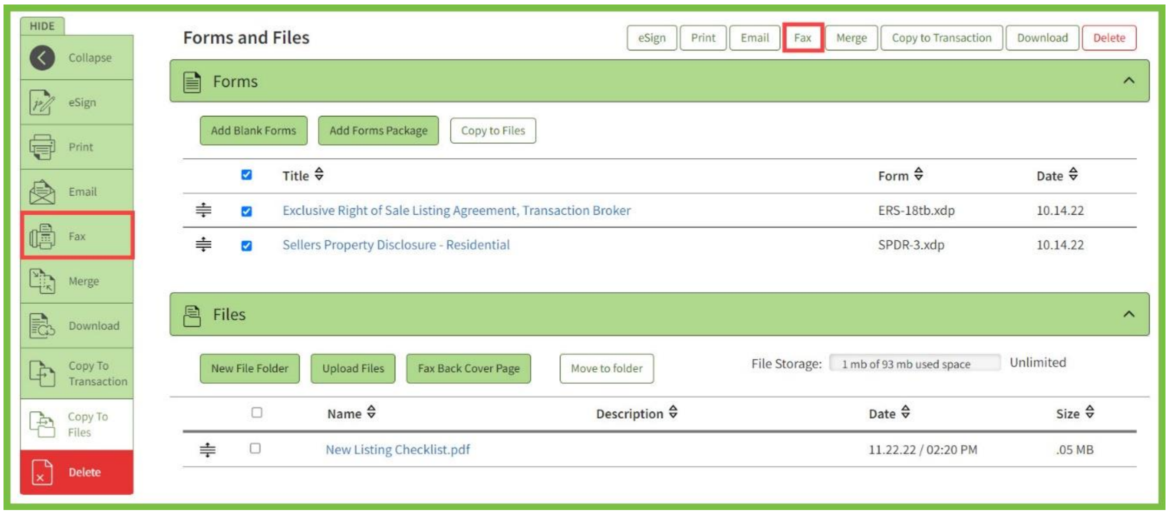


Transactions: Fax Form(s) and/or File(s)

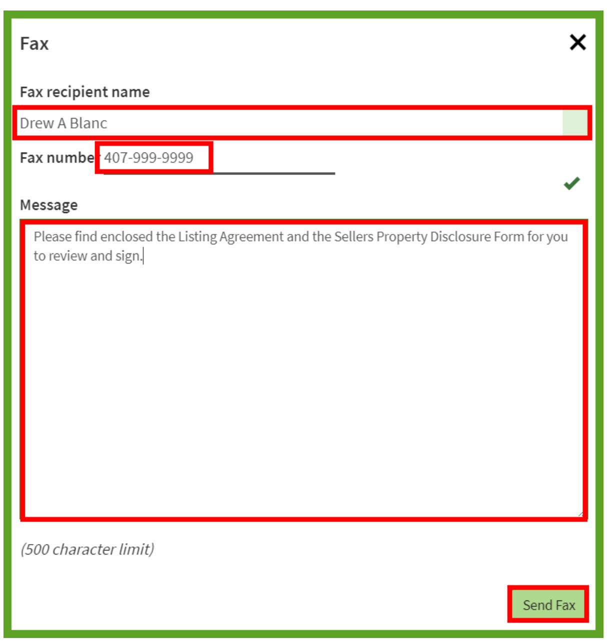
Use Form Simplicity to **fax form(s) and/or file(s)** from a transaction to a specific recipient. For example: If you are working with a client who only receives paperwork via fax, you can fax them the required form(s) and/or file(s) for them to sign and fax back.

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.



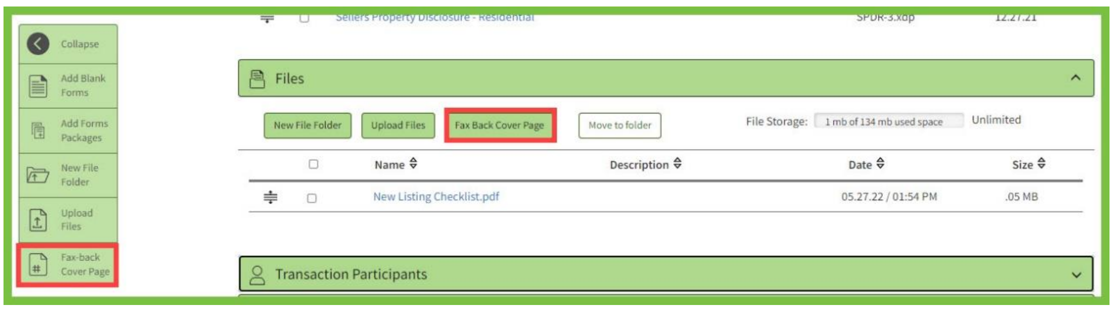
Faxing to a Transaction

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.

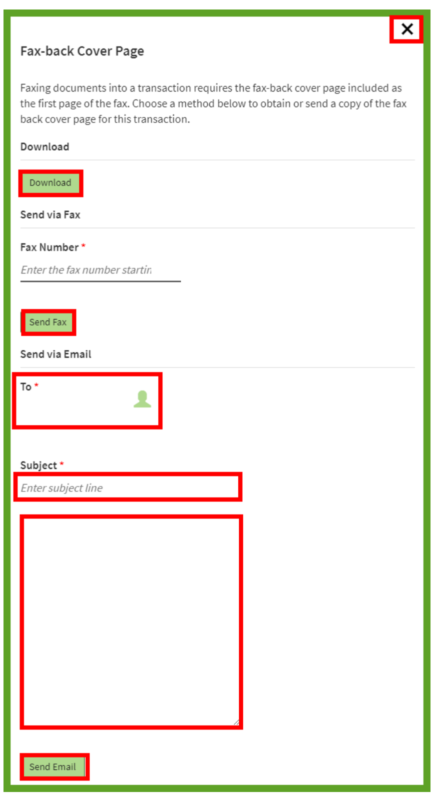
Follow these steps to obtain the ***Transaction-specific Cover Page****:*

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.



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



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

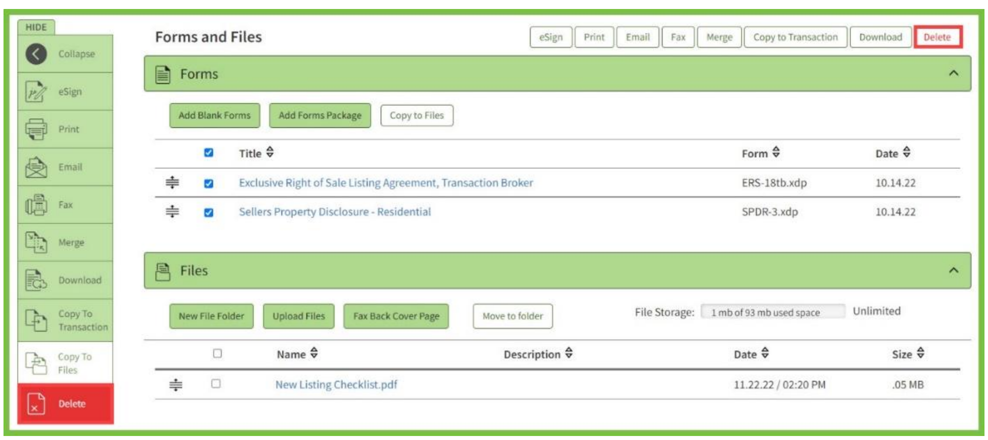
5. After the documents have been faxed to the transaction along with the Cover Page, the faxed documents will be stored in the ***Files*** section of the transaction.

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

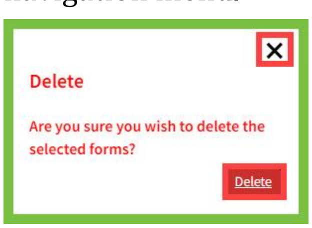
Delete form(s) and/or file(s) from a transaction when you no longer need the form(s) and/or file(s) in the transaction.

1. Log in and open the transaction.

2. 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.



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.

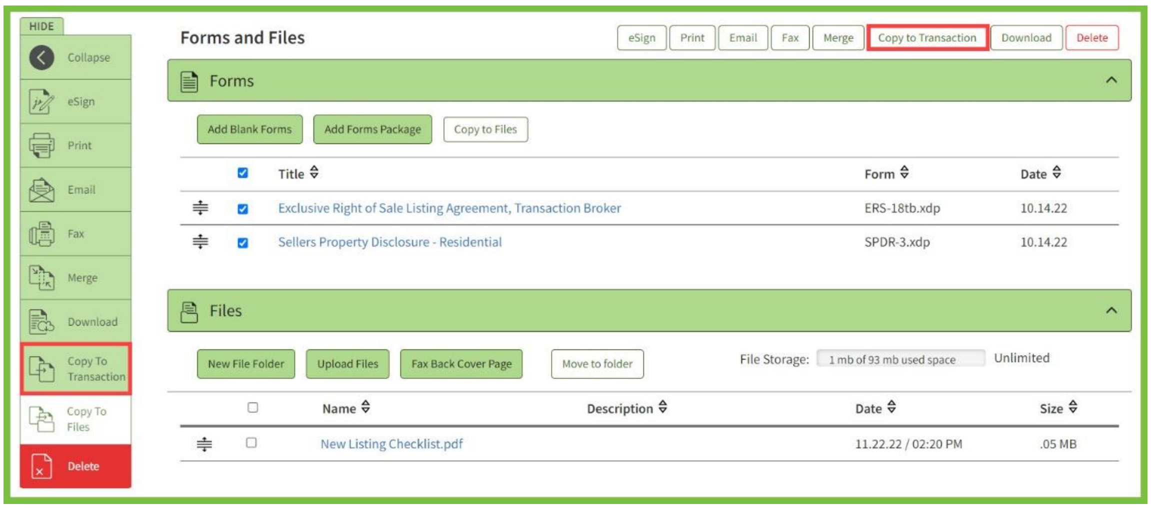


Transactions: Copy to Transaction

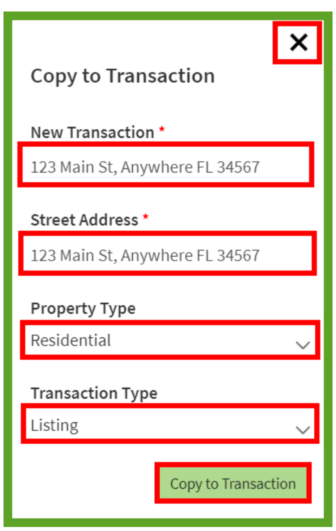
The **Copy to Transaction** command allows the user to copy the form(s) and/or file(s) to a new transaction instead of creating a transaction from scratch.

1. Log in and open the transaction.

2. Select the form(s) and file(s) that you would like to copy to a new transaction by placing a check mark on the boxes next to them. Click on **"Copy to Transaction"** located to the right of the ***Forms and Files*** title or click on the **"Copy to Transaction"** button on the ***Primary Action Sidebar*** located on the left margin in the transaction details page.



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.



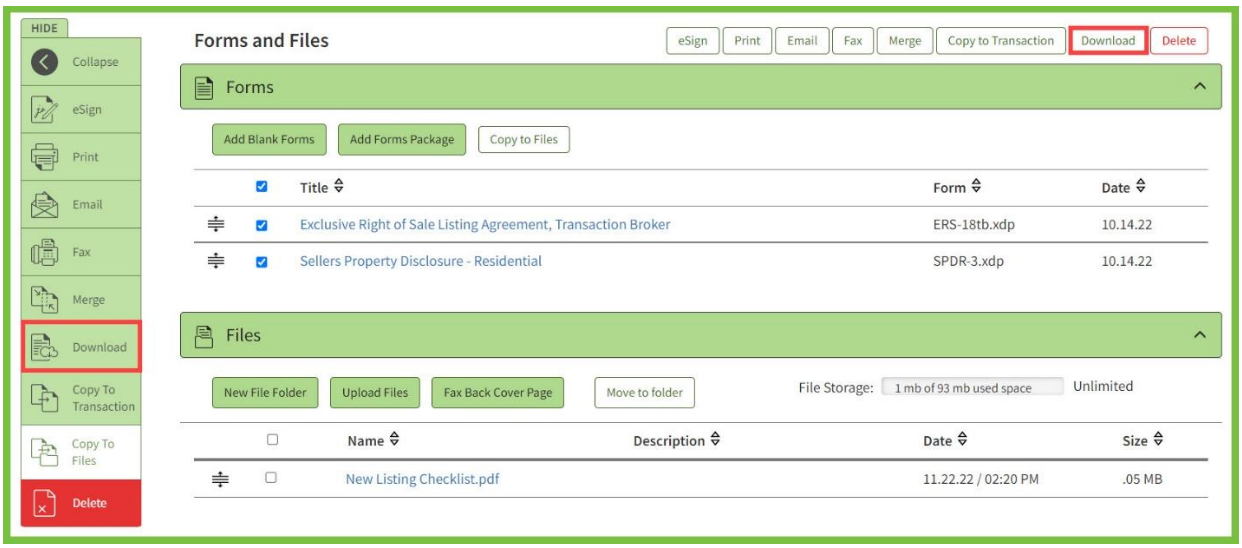
4. The new transaction contains the forms and files from the previous transaction.

Transactions: Download

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

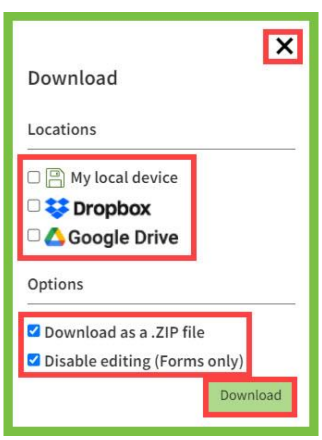
1. Log in and open the transaction.

2. 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.



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.

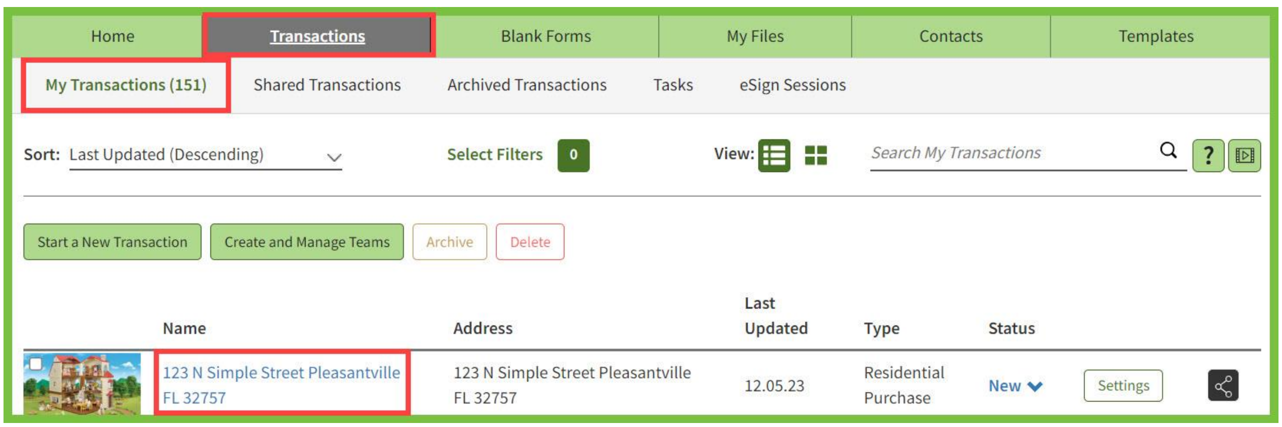


eSign – (*Ultimate Edition feature)*

Create an eSign session

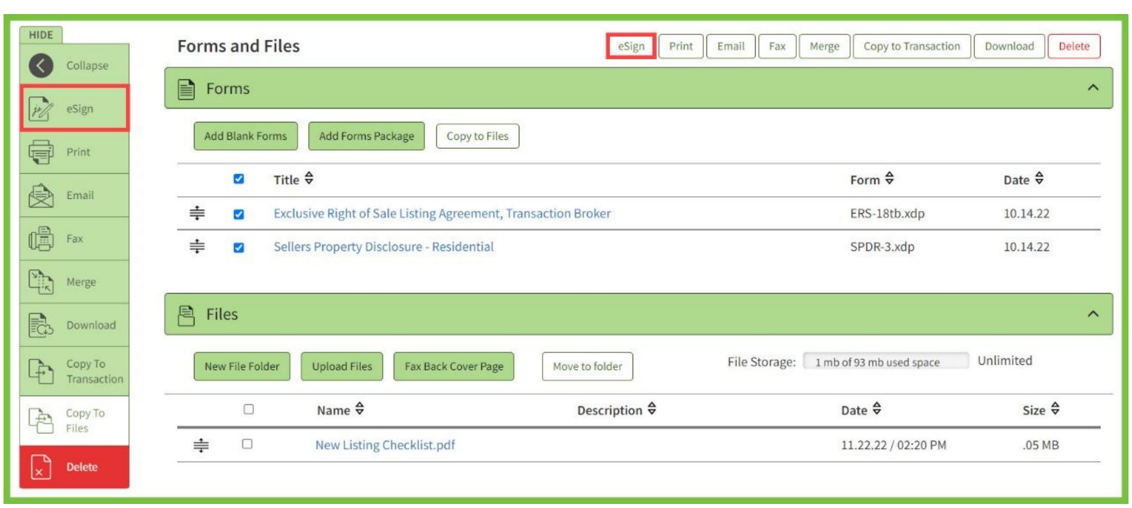
Note: Although digital signatures are as valid as "wet" signatures, not all financial institutions choose to accept them. You may wish to confirm that the parties involved in your transactions will accept digitally signed documents before proceeding.

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.

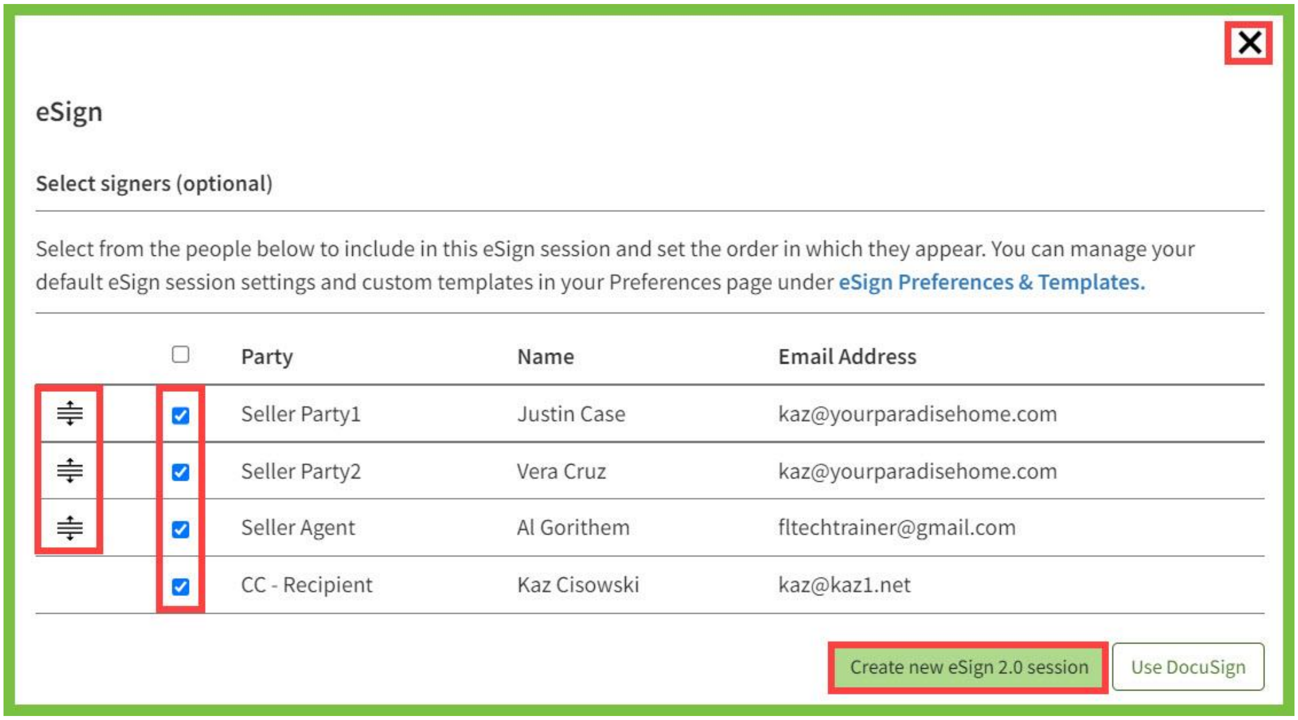


Note: eSign sessions may only be processed through an active transaction. If you have not created an active transaction yet, please follow the instructions in the "Create a new Active Transaction" article first.

2. 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.



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.



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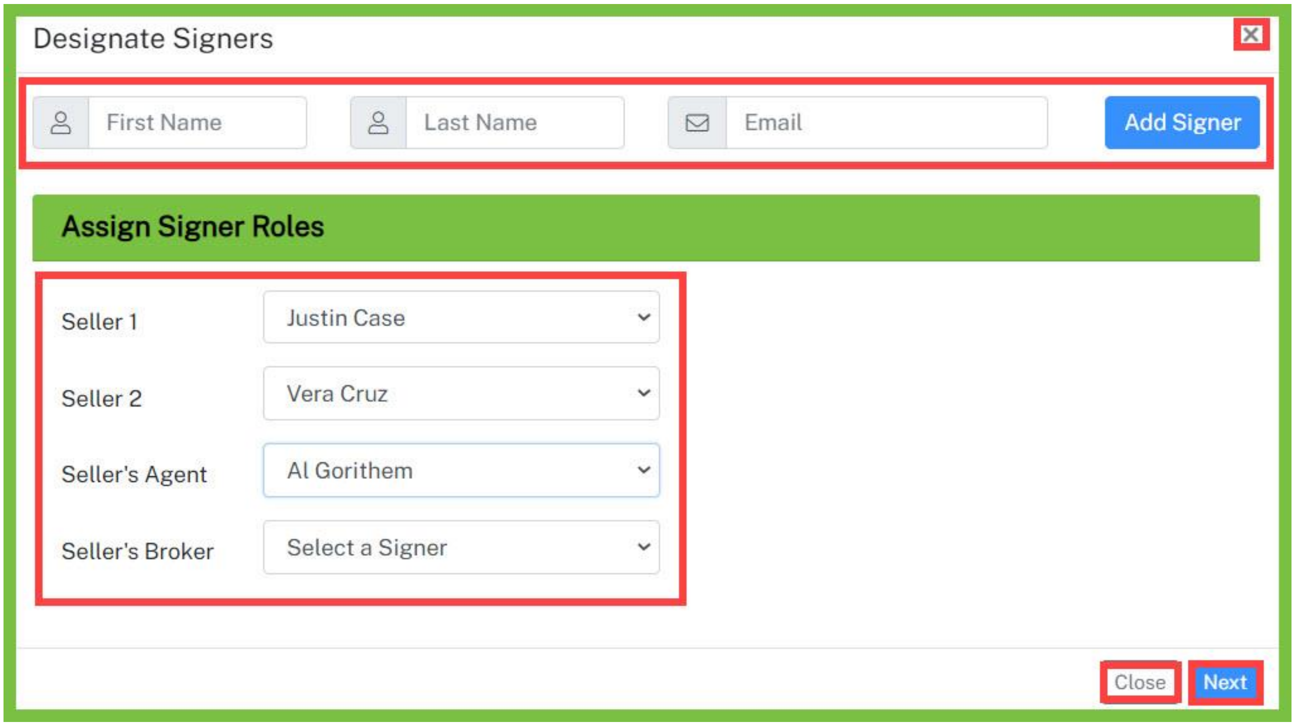
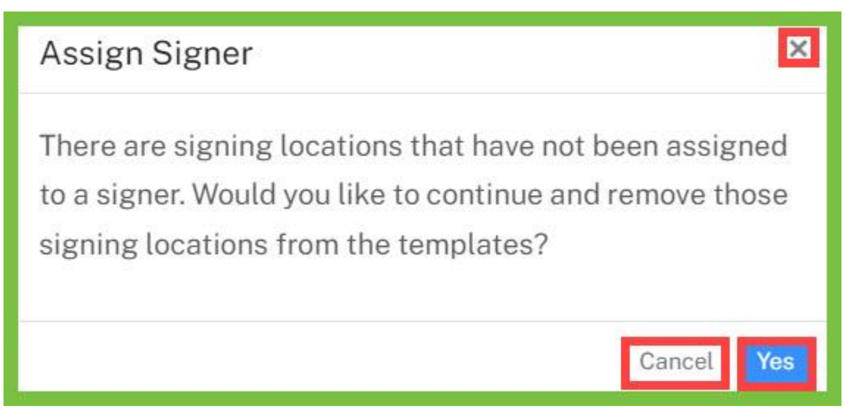
Step 1 – Signing Session Configuration

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.



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

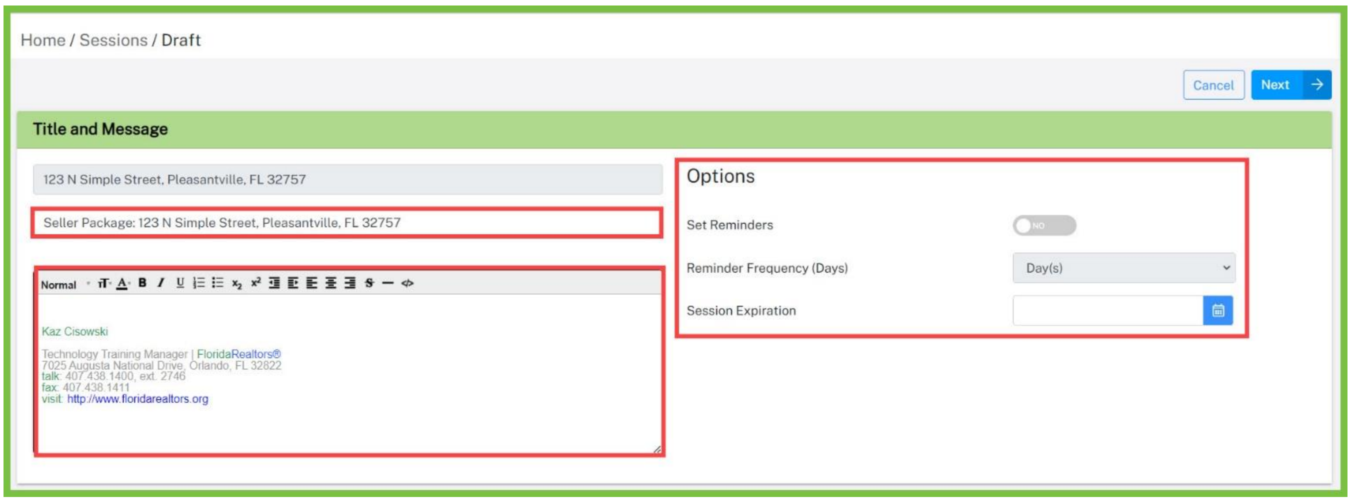
The eSign session automatically includes a **Transaction Name**.

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.



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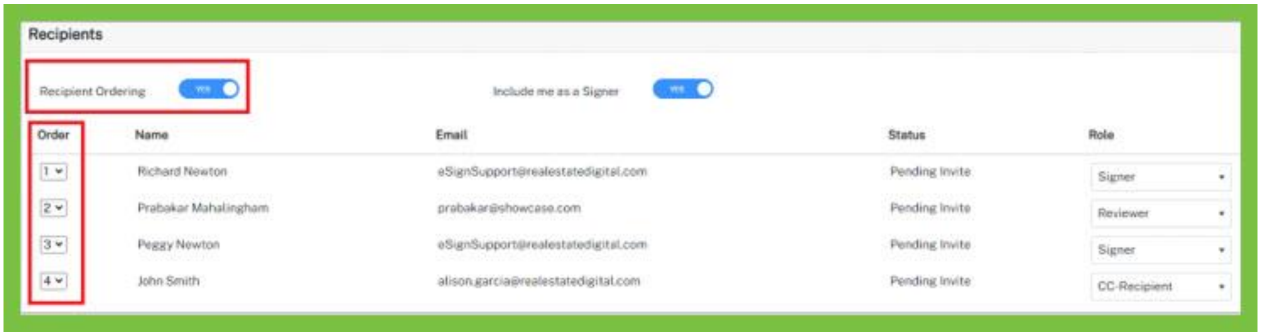
Recipients

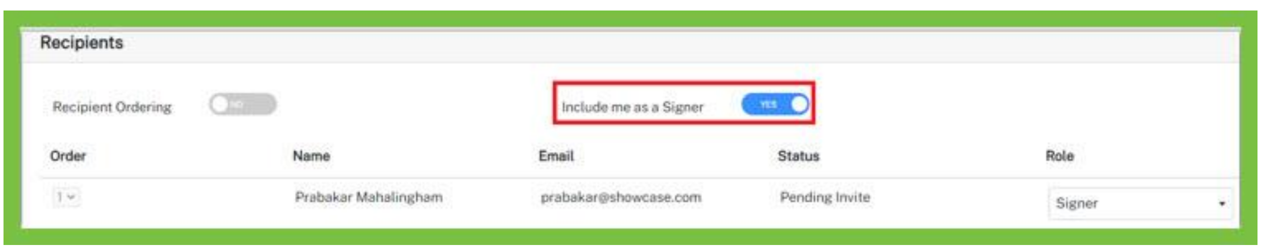
1. Senders have the option to set the order of who should sign first, second and so forth using the ***Recipient Ordering*** toggle function.

   - 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.



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.

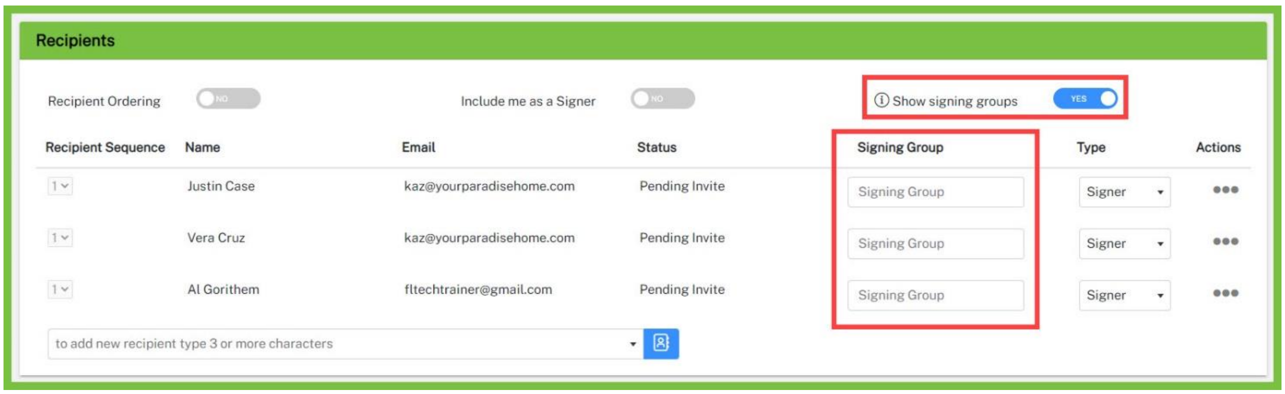
   When the signing session is sent and depending on the signing order, the sender may be asked if they would like to sign now or later.



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.

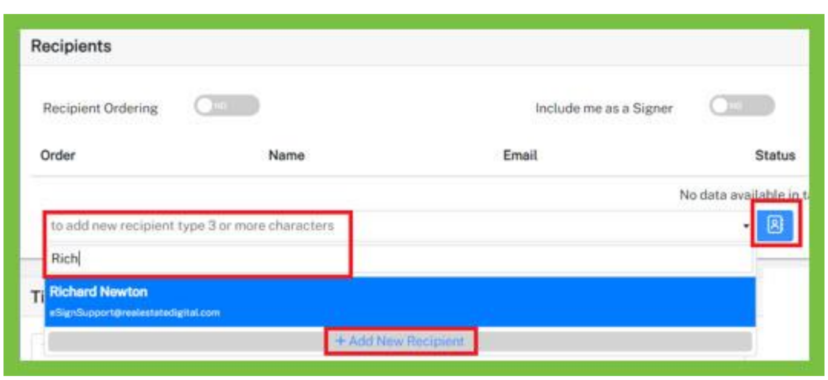
   In the signing groups column, enter the name of the group. The group name must be an exact match for the system to include everyone on the group.



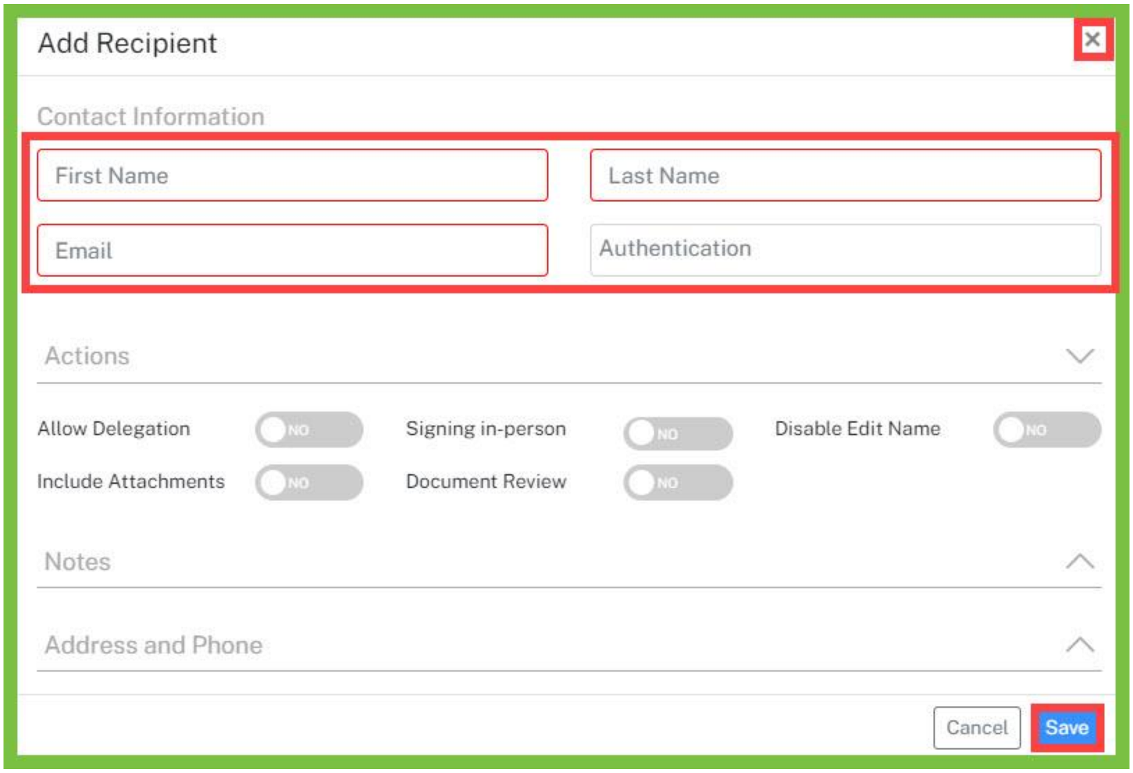
4. The sender can add multiple recipients to the session. There are three recipient roles and can be summarized as:

   - **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.

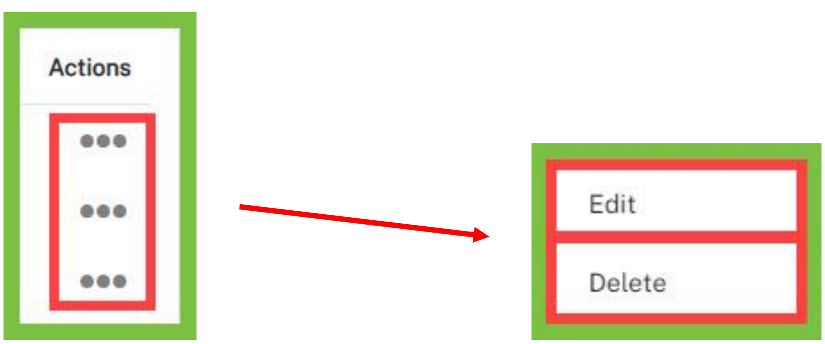


6. ***+Add New Recipient* –** New signers can be added when the signing session is created. Click the **"+Add New Recipient"** text in the recipient search box. A pop-up screen will open.



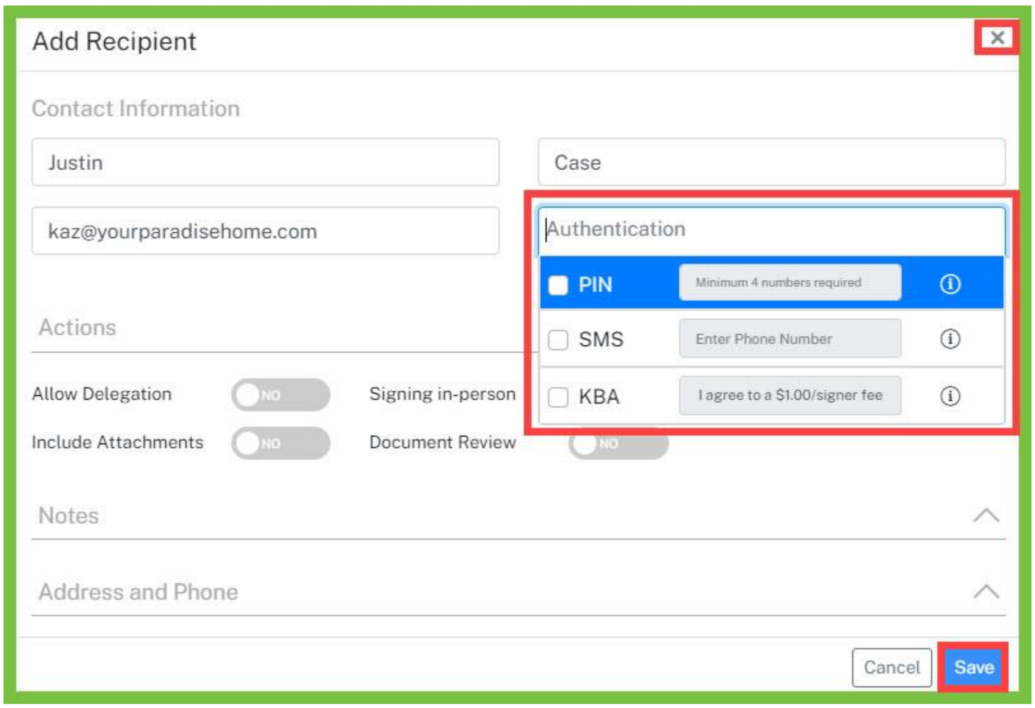
At a minimum, enter the recipient's First name, Last name, and Email address. Click the **"Save"** button to add them to the session. They will also be saved as a contact and available for future signing sessions.

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.



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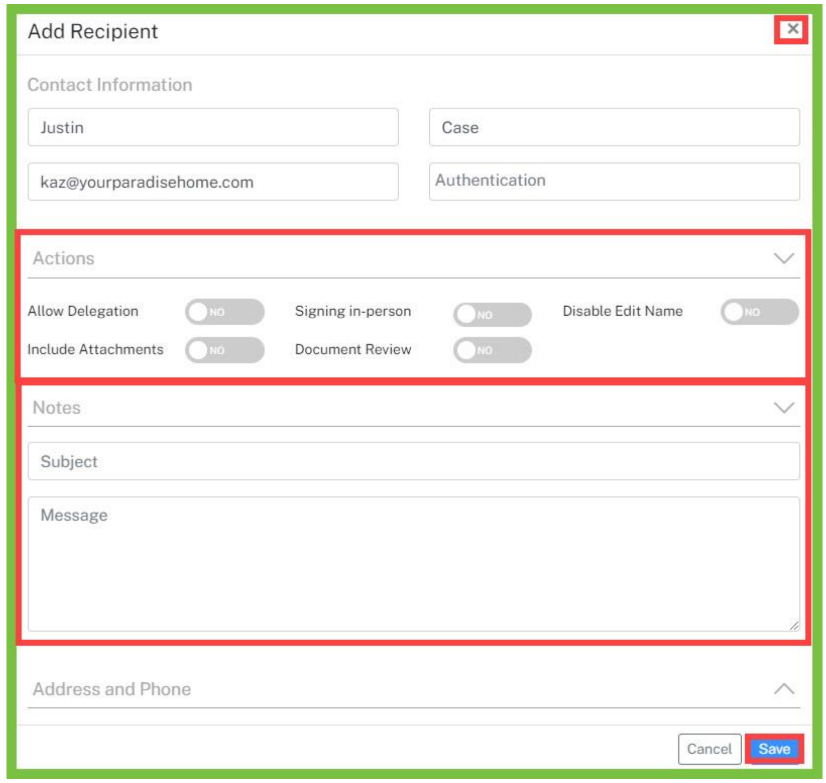
9. Each recipient can also have personalized signer options. Signer options can be summarized as:

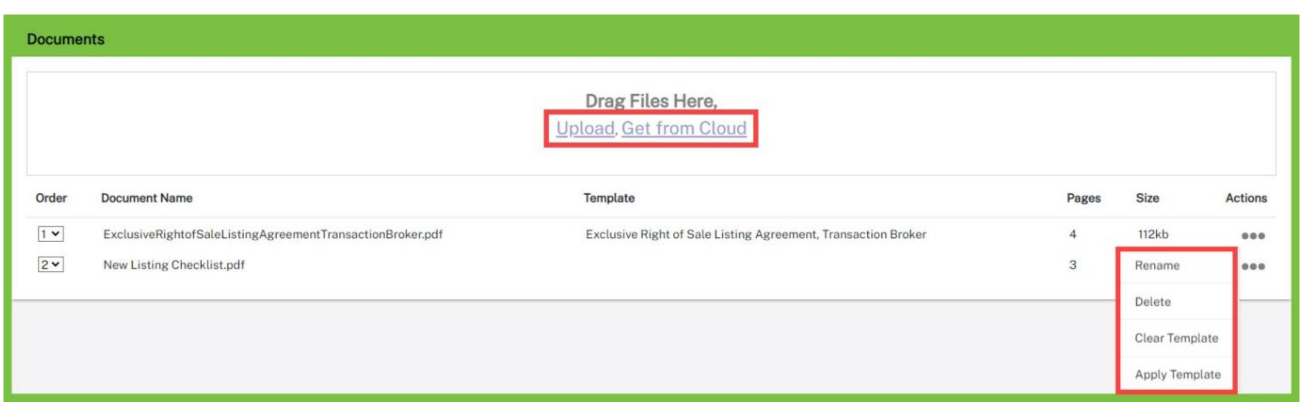


- **Allow Delegation –** Allows signers to delegate to another person
- **Signing in-person –** Allows signers to sign their session in person with the sender present
- **Disable Edit Name –** Doesn't allow the signer to edit their name during the signing ceremony
- **Include Attachments –** Sends completed 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

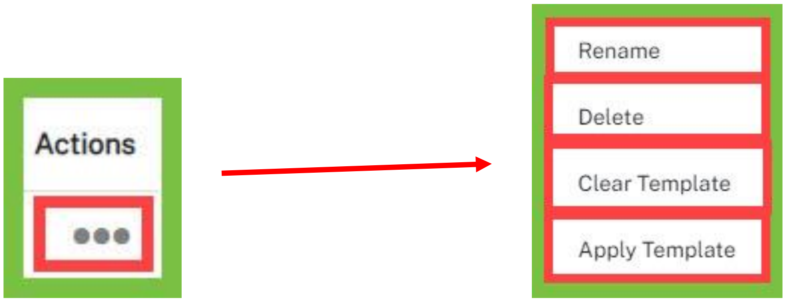
Documents

1. 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.

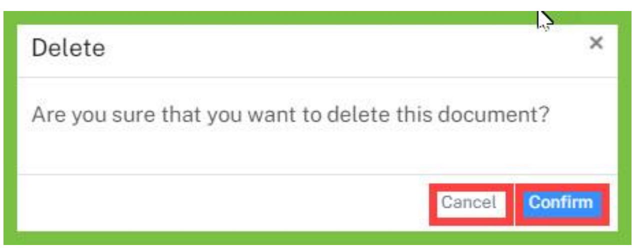


2. Click on the ellipsis on the ***Actions*** column, to open the eSign template menu.



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

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



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

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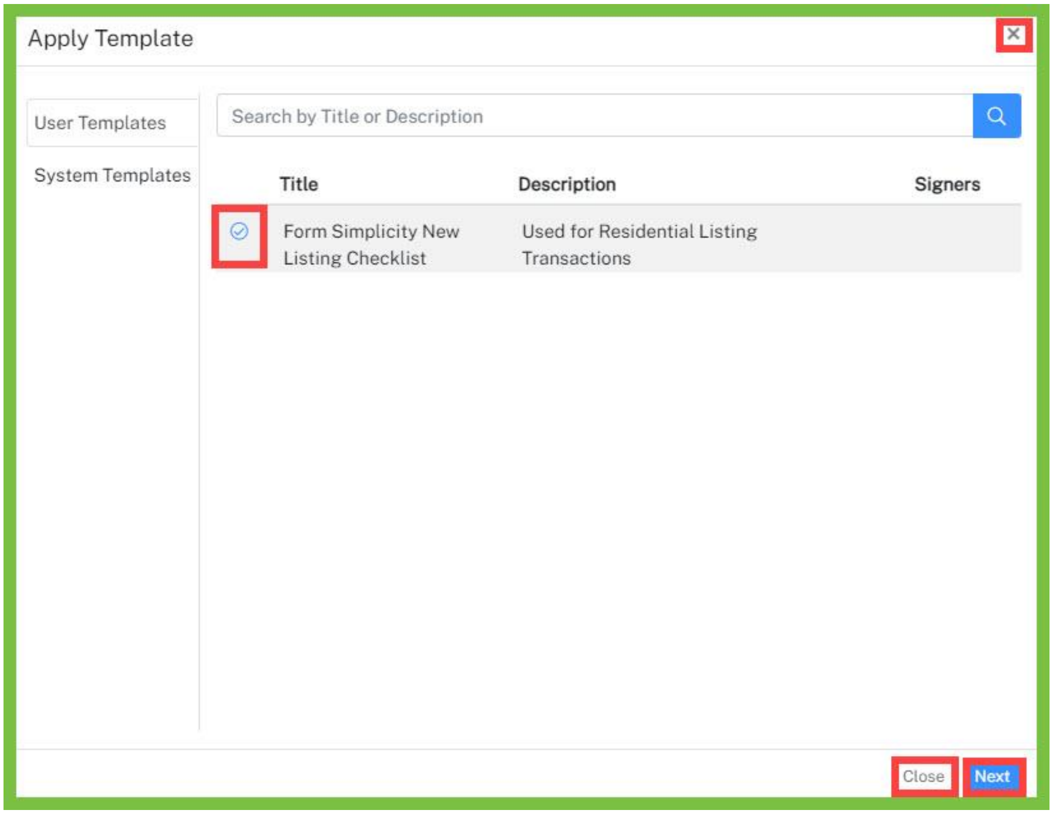
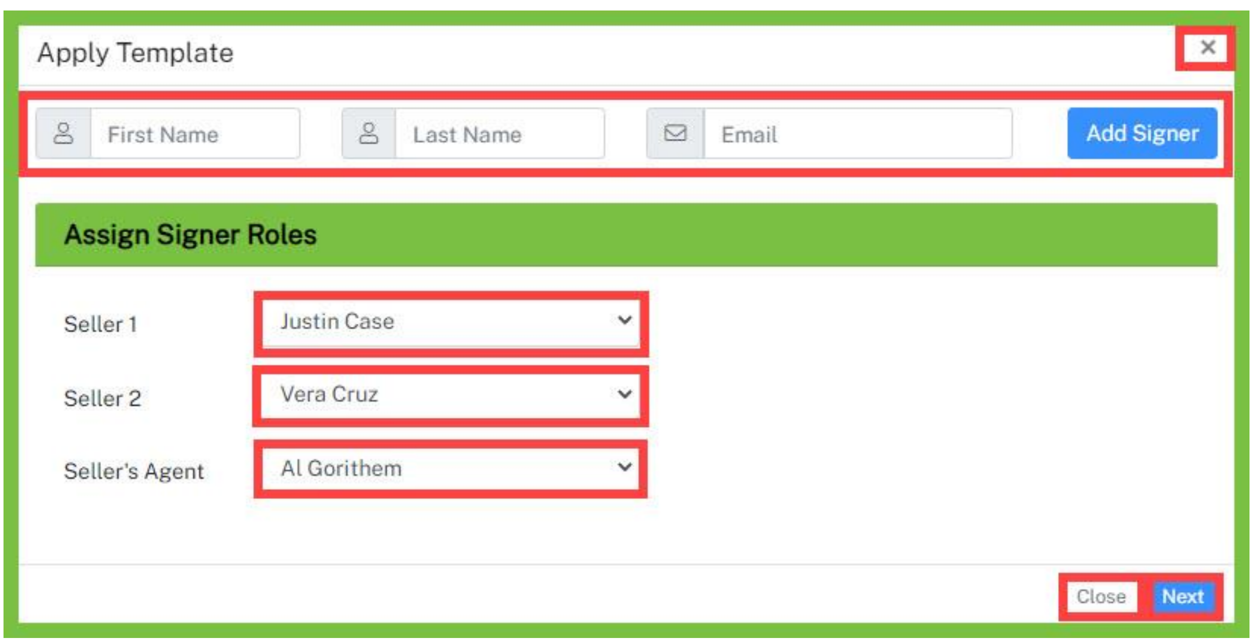
3. Templates can be assigned manually on this step by selecting the **"Apply Template"** option under the ***Actions*** menu. *Note: An eSign template needs to be created first in **Templates** located in the eSign Preferences and Templates section under **My Preferences**.* Select the appropriate template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



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



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

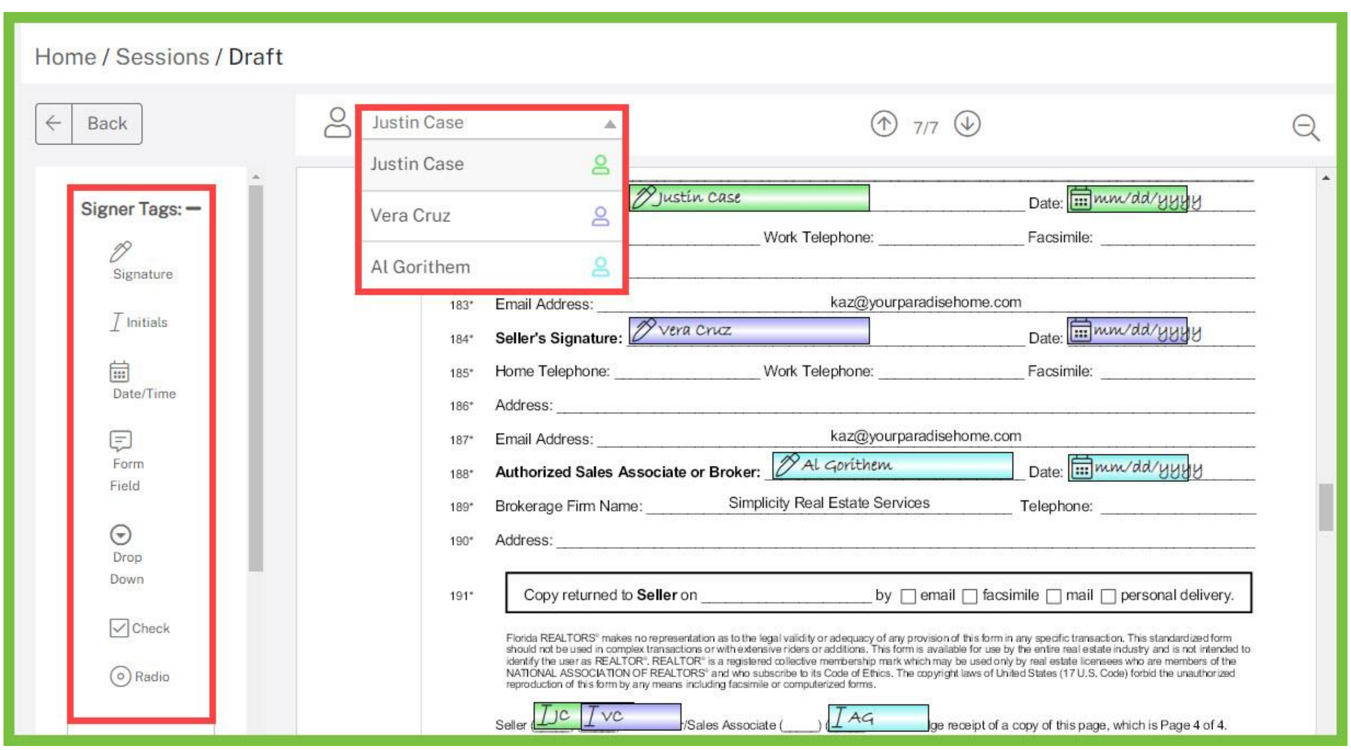
Step 2 – Add Signer Locations

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 drag and drop 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.



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.*

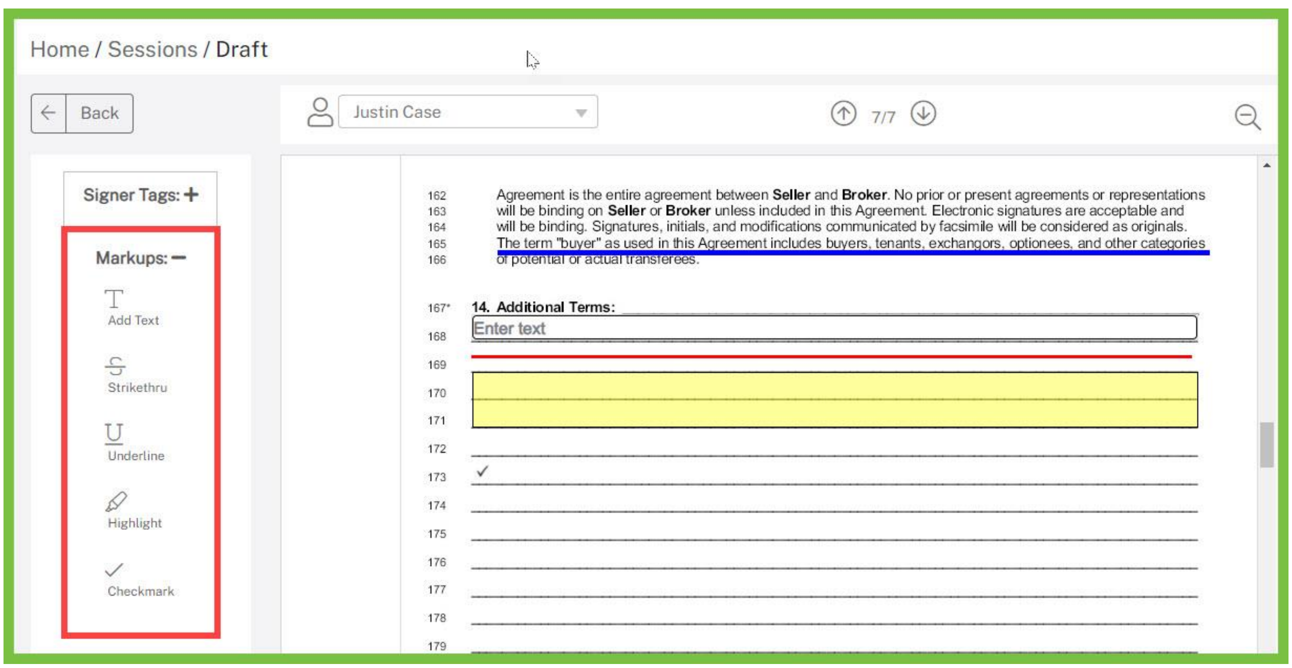
Markups

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.

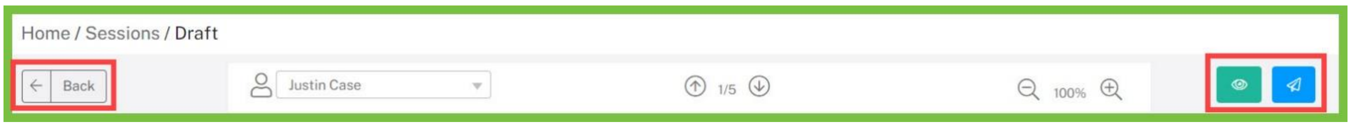


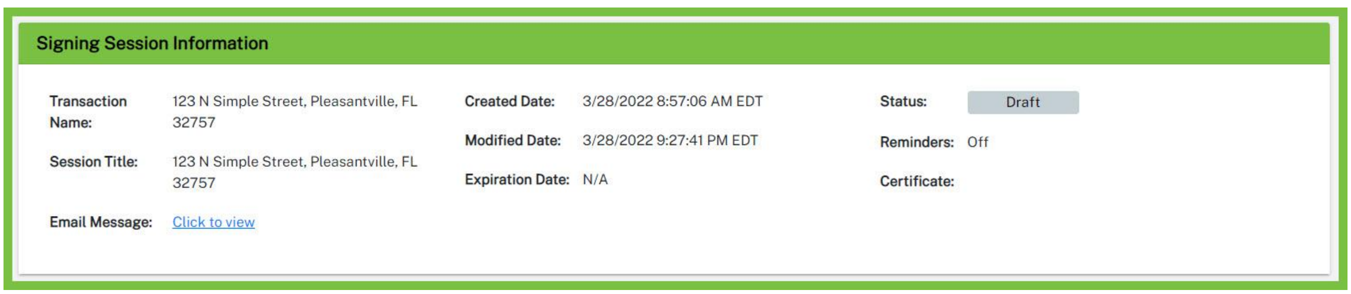
When the documents have all the necessary signer tags and markups, the sender can either **"Preview" (eye)** the session and the documents or **"Send" (paper airplane)** the session to the recipients.

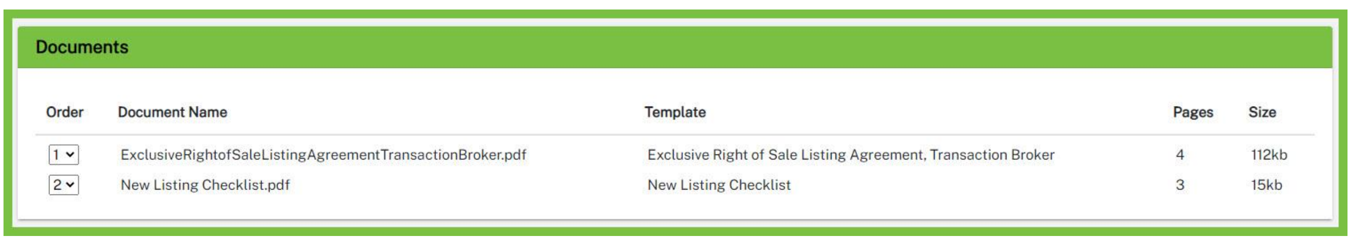
Step 3 – Preview and Start Signing Session

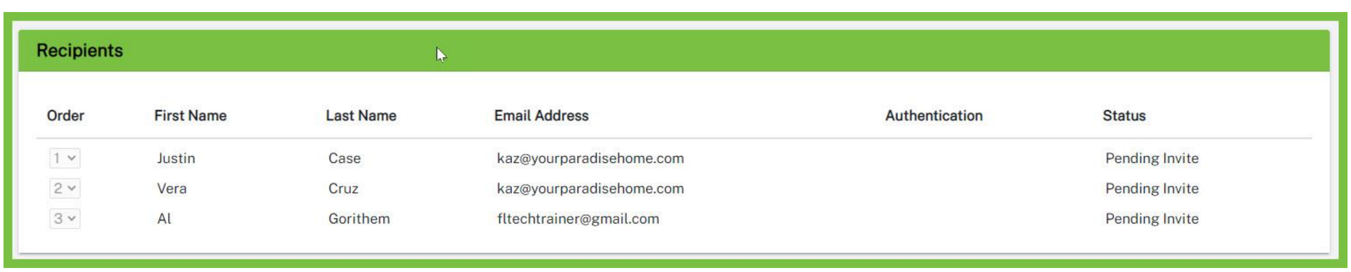
Clicking on the **"Preview"** button is optional, allowing the sender to preview their session under one view. This gives you the opportunity to review your forms as the recipients see it and to click on the **"Back"** button to go back to the previous step to make changes to the session if needed. Otherwise,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



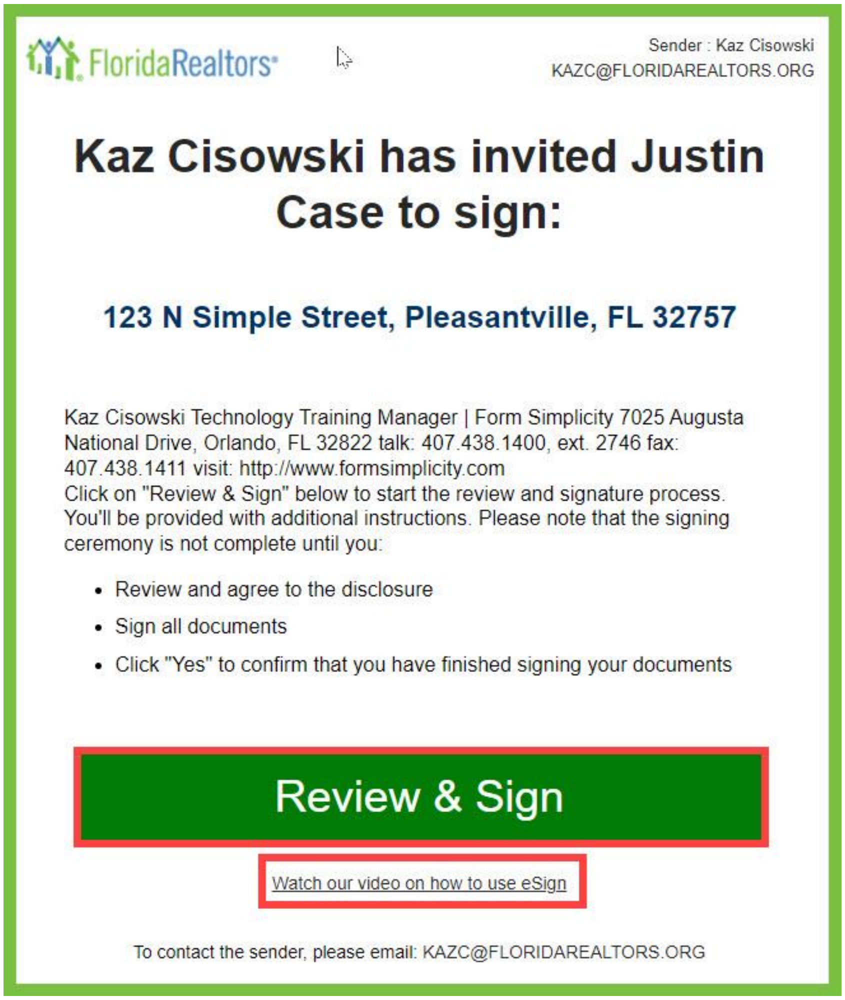






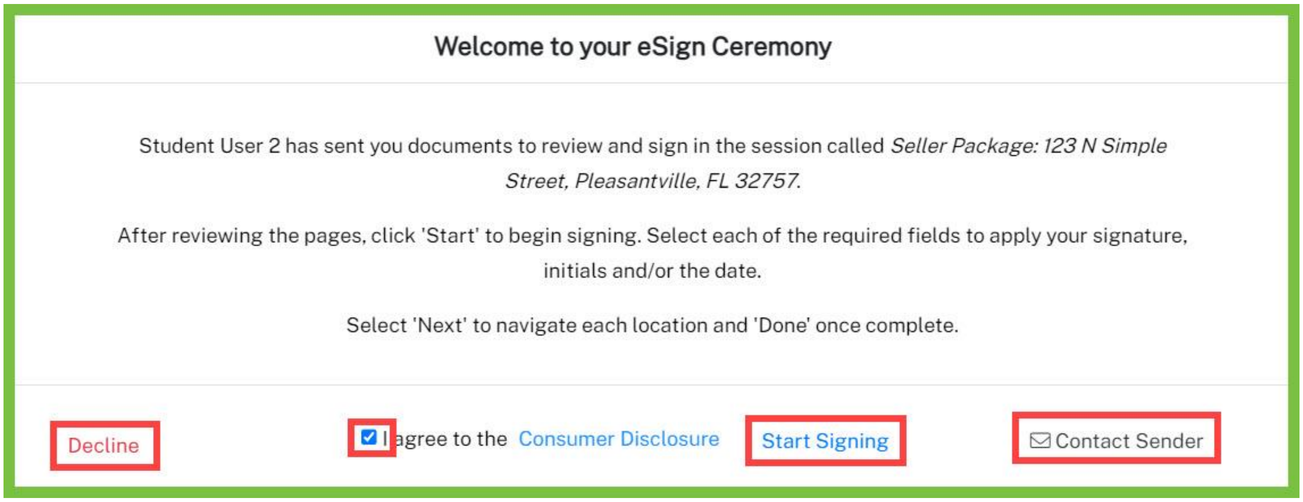
eSign From Your Client's Perspective

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.

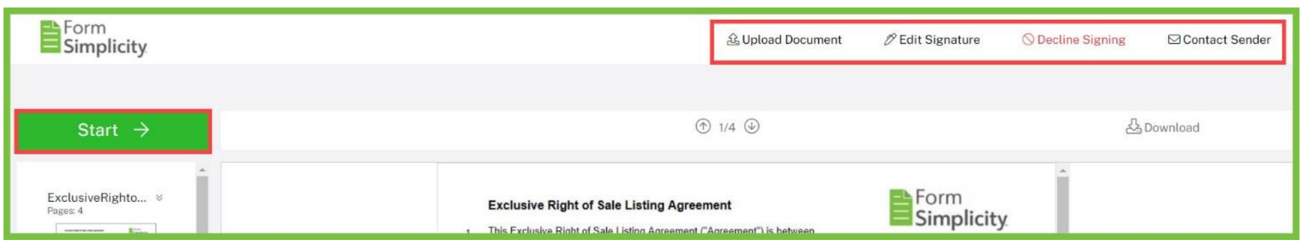


Note: Your client can watch a 5 min. instructional video that will walk then step by step on and eSign signing.

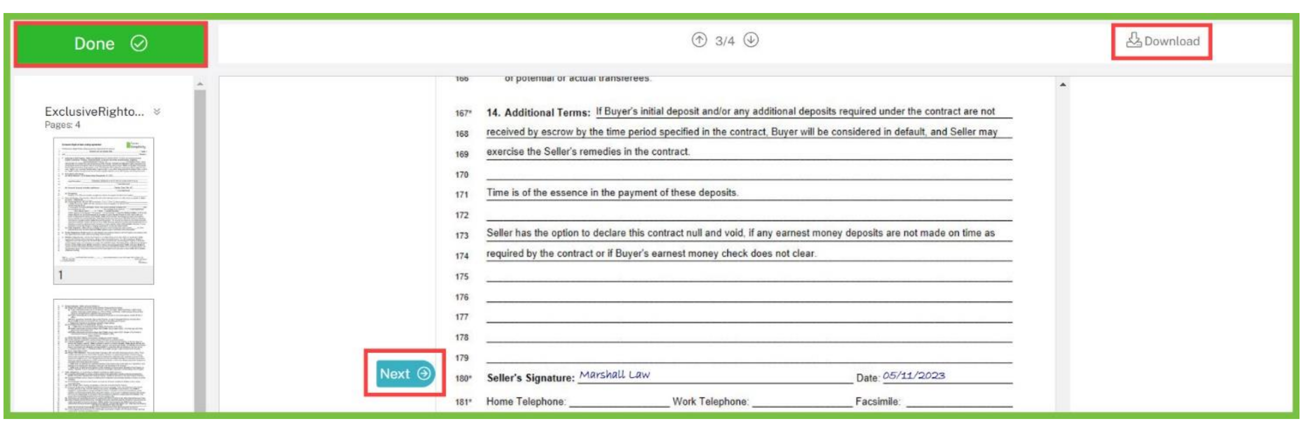
2. In the signing session, the signer will have the following options: **Decline** and Contact Sender. Signers will be prompted to accept the Consumer Disclosure by clicking the ***I Agree*** check box, then click on the **"Start Signing"** button to enter the signing session.



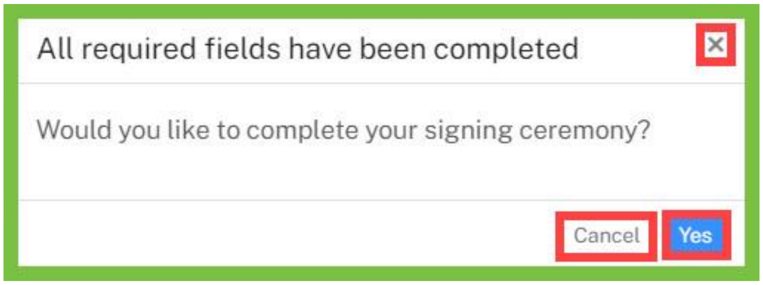
3. The document will include all Signed tags added by the session owner. To begin the signing process, click on the **"Start"** button. In the signing session, the signer has the options to **Upload Documents, Edit their Signature, Decline Singing** or **Contact the Sender**.



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.



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.

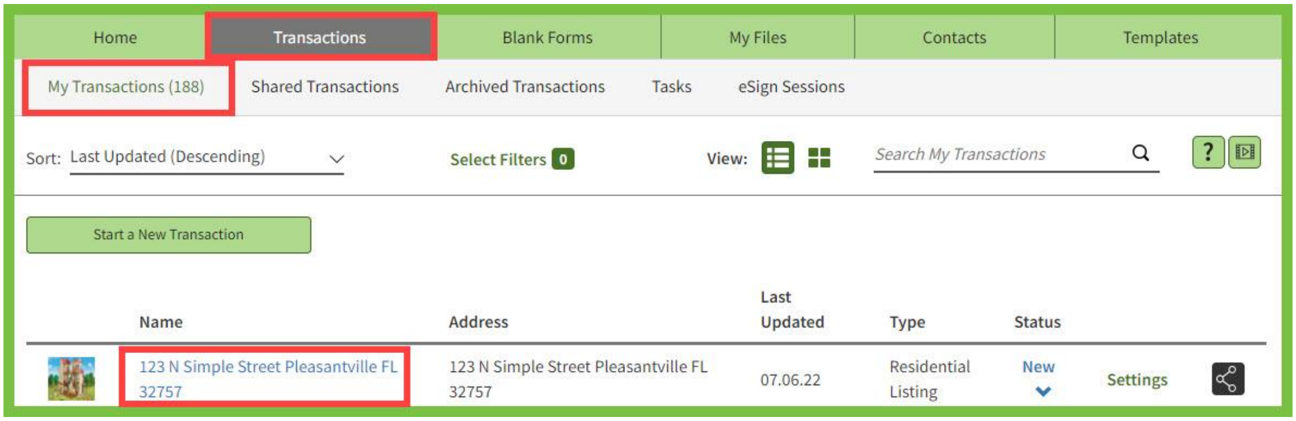


6. An email will be sent to the agent notifying them that the signature session has been completed. The signer can then download a copy of their signed document.

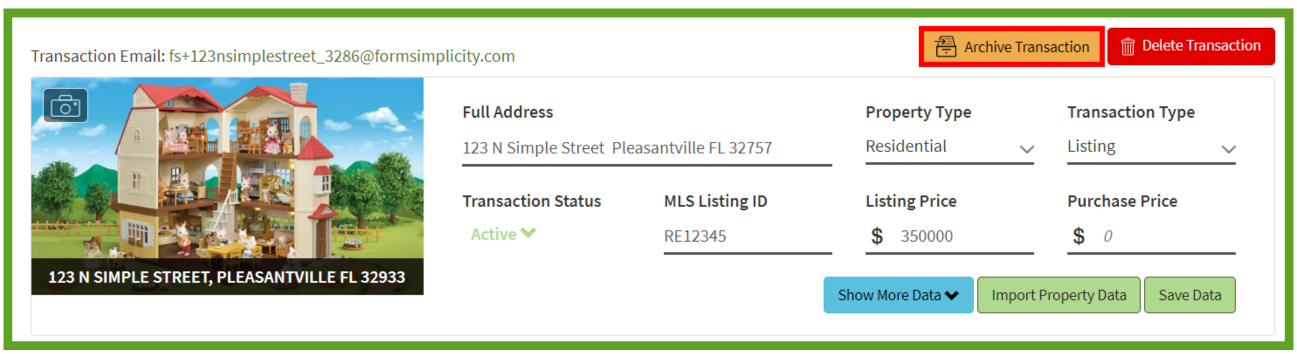
Transactions – Archive Transaction

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.

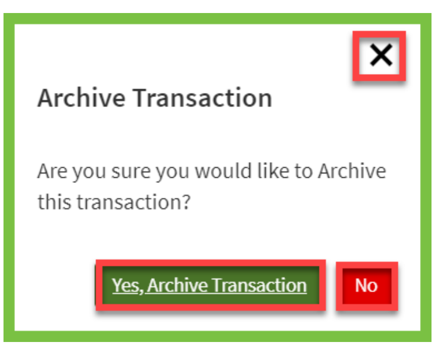
1. Log in and click on **"Transactions"** from the main navigation menu at the top of the Form Simplicity home page which will automatically take you directly to the ***My Transactions*** screen. Then locate the transaction that you wish to archive and open it.



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

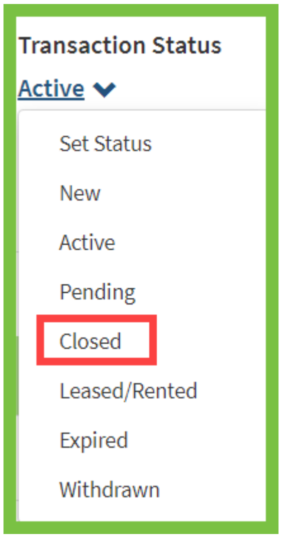


3. The **Archive Transaction** pop-up window will open asking ***"Are you sure you want to Archive this transaction?"***. Click on the **"Yes, Archive Transaction"** button to archive the transaction or click on the **"X"** button to cancel the action.



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.

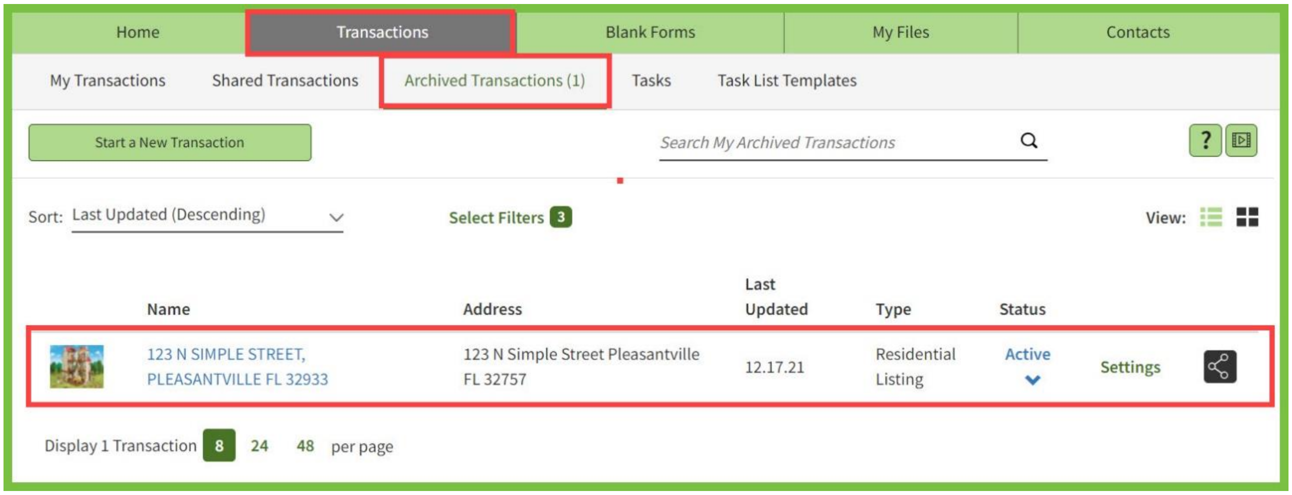


Notes: ____

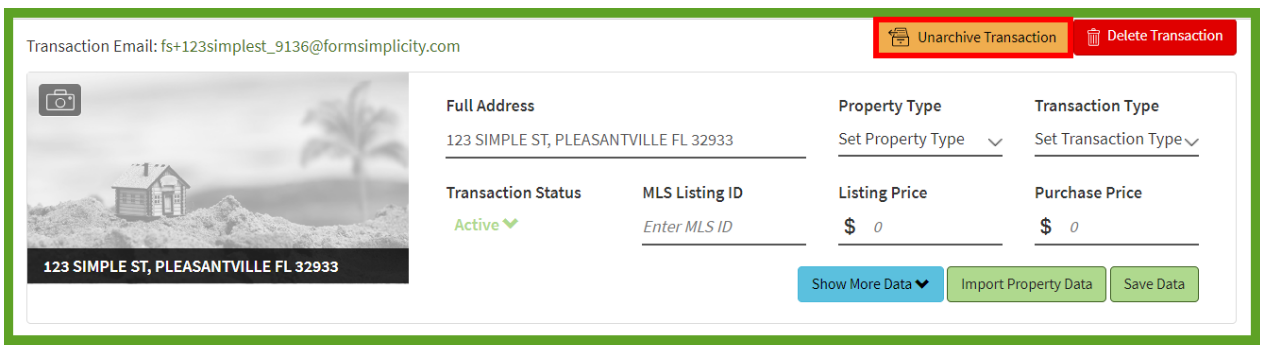
Transactions - Unarchived Transaction

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

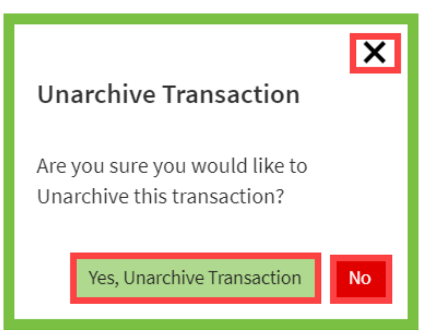
1. Log in and click **"Archived Transactions"** from the ***Transactions*** sub-menu at the top of the Form Simplicity home page. Then locate the transaction that you want to make Active again.



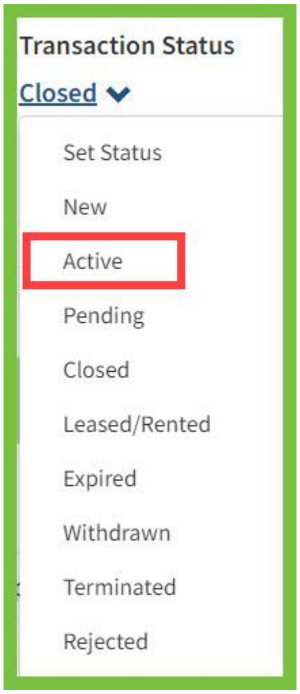
2. In the top right corner of the transaction record, click on the **"Unarchive Transaction"** button.



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



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



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

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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.