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Introduction

CREA has partnered with Lone Wolf Technologies to launch a new version of WEBForms®, which will be powered by TransactionDesk®. The solution will be rebranded as CREA WEBForms® and will be integrated with board / association MLS® Systems. It will maintain its current connections to the 3rd party applications, continuing to provide choice to members.

It is available to all members of the Canadian Real Estate Association (CREA) and provides access to a library of up-to-date real estate forms, contracts, and clauses, made available by the Canadian Real Estate Association, Provincial Associations, and local Boards and Associations. In addition, WEBForms® is integrated with third party Esignature and Transaction Management platforms. Members using those tools can link their accounts to send forms to be digitally signed directly from WEBForms®. WEBForms® is still integrated with board / association MLS® systems in order to pre-fill forms with MLS® System information.

This Help Guide is divided into the following sections:

Section A: Getting Started

Section B: Navigating and Understanding CREA WEBForms®

Section C: Working with WEBForms®

Section D: Setting up your Profile and System

Section E: Customizing your Dashboards using Widgets

Section F: Broker Tools

Appendix A: Glossary

Appendix B: FAQs

Appendix C: Videos

This Introduction includes the following topics:

Top Priority – Transfer of clauses, templates, forms, and transactions

What's New in CREA WEBForms®

Best Practices for CREA WEBForms®

About this Guide

Using this Guide

Icons & Conventions

Top Priority – Transfer of clauses, templates, forms, and transactions

Clauses and templates will automatically be migrated over on behalf of the user so that the user will not have to do anything themselves. The grouping of forms will be retained.

Caution: Any prefilled data within forms that are attached to a template will NOT migrate over and will need to be re-entered.

Caution: Users will need to refresh any clauses that had been included within their templates.

If users wish to retain any of their existing transaction kits within the new version:

You can upload individual existing transaction kits from CREA WEBForms® Legacy to CREA WEBForms® 2019 as non-editable PDFs only.

Caution: We recommend that before December 31, 2019, you upload any existing Transaction kits that you wish to retain from CREA WEBForms® Legacy.

What's New in CREA WEBForms®

- **Transaction Wizard**
  The Transaction Wizard is a five-step process in CREA WEBForms® by which a signing is created and sent to participants for completion. Users adjust the signing settings, choose participants, choose documents and forms, set up their documents and forms, and then send the signing to all participants.
- Transaction Kits are now referred to as **Transactions**.
- Template Kits are now referred to as **Transaction Templates**.
- Your Home Page is now called the **Member Dashboard** and indicated with a Dashboard icon
- Your **Transactions** page is indicated with a House icon
- The previous version of WEBForms® is now referred to as **CREA WEBForms® Legacy.**
- **Success**, **Error**, and **Information** messages will briefly display in the top right corner of the screen, lasting for a few seconds only.
- Once forms have been filled out and sent back to you, they go to the **Documents** folder.

CREA WEBForms® is being rolled out across the country, with the first release in March 2019. It offers the following features:

CREA WEBForms® custom version of the Instanet TransactionDesk® Agent Edition

- Availability of all existing forms, clauses, and templates
- DocBox (Document Management) Instanet TransactionDesk® Agent edition
- Client Management Dashboard
- Team Sharing

3rd Party Application Integrations

- Integrations with Authentisign, Docusign®, NexOne, E-z-max, Velocity and SecureShare will continue to be part of the application
- Integrations with other e-Signature platforms will be coming
- CREA WEBForms® will continue to be available through the single-sign-on functionality of the National Authentication Facility (NAF)

MLS® System Integrations

- All the existing integrations with board / association MLS® Systems will continue to provide data for auto-population
- ADT (Listing Upload) integrations will continue to be developed

CREA will continue to direct ongoing CREA WEBForms® product development

Best Practices for CREA WEBForms®

In CREA WEBForms®, the transaction is the basis of the entire workflow. Think of a transaction as a file, just like the files you have in your office – it contains information on a client, on a listing, on a sale, a lease or whatever you are

working on and organizing. Creating a transaction is the foundation for introducing efficiencies, reducing redundant data entry, sharing, and allowing clients and vendors to participate in using the system.

Transaction creation (or addition to an existing transaction) is the first step anytime you:

- Make initial contact with a new prospect,
- Schedule a listing appointment and presentation,
- Create a listing agreement,
- Create an offer to purchase or sell,
- Write a lease listing or offer to lease, and
- Start a project of any kind.

Creating a transaction allows you to do several things:

- Import listing data from your MLS® System,
- Import tax or public record data,
- Use all the data imported into or manually entered into a transaction to auto-fill every form added to the transaction;
- Create a place in your WEBForms® account to store all the contacts, forms, documents and service orders associated with that transaction or event, and
- Start a brokerage file for a newly listed or sold transaction upon notice from the listing or selling agent.

Implementation / Workflow

When your brokerage is implementing CREA WEBForms®, first decide who is responsible for creating the transaction. Where does the transaction start?

Transaction creation can be assigned to one person/role, or there may be multiple people who can create transactions. Ideally, one person in the brokerage has the responsibility for ensuring a new transaction is created when a new brokerage file is opened.

Train Your Agents to Create Transactions!

Training agents to create and populate transactions and transactional data will:

- Help agents save time, be more efficient and more effective.
- Help your staff save time as they won't have to create each transaction or enter all the property, personal, and transactional information.

About this Guide

Set up as both a reference document and a procedural document, this guide provides information for users of CREA WEBForms®. It provides both information on the application, and steps to follow to accomplish common tasks.

This guide is divided into sections.

> Section A deals with getting started. Topics include systems requirements, logging in, and a quick-start guide.
>
> Section B deals with navigating through the application, with a brief explanation of the dashboards and toolbars. It also provides an explanation of WEBForms® components including clauses, forms, Transactions (used to be called Transaction Kits), and Transaction Templates (used to be called Template Kits).

Section C deals with performing tasks in WEBForms®.

Section D deals with setting up your profile and system

Section E deals with customizing your dashboards using widgets

Section F deals with Broker Tools, which are only available to Brokerage Owners

Using this Guide

If you are new to CREA WEBForms®, you should go through the entire help guide. It will help you to log in and navigate through the various pages, and understand clauses, forms, transactions, and transaction templates. You can then use the **Quick Start** guide to begin building your own Transactions and use the various Tutorials for more advanced tasks.

If you are an experienced WEBForms® user, you can view the changes in What's New in CREA WEBForms® and then go directly to Tutorials for specific tasks.

Working with Forms

Working with Transactions

Working with Transaction Templates

Working with Documents

Working with Clauses

Working with Contacts

Working with Checklists and Tasks

Working in Teams

Icons & Conventions

CREA WEBForms® has a standard icon set.

Icon	Function	
	Add	Adds a clause, document, file, form, task, transaction, etc.
	Apps Store	Displays apps such as Esignatures for purchase
	Basket	Allows you to perform an action on multiple selected items
	Clause	Allows you to add a clause in Forms
	Contacts	Displays your contacts
	Create Transaction	Adds a new Transaction
	Dashboard	Brings you to your Member Dashboard (home page)
	Documents	Store, organize, manage, access, and work with your documents
	Download	Allows you to download forms in the Preview window
	Download PDF	Download a PDF
	Ellipses Menu	Click to view an expanded menu of available actions

	Email Document	Email a document
	Expand Menu/Sidebar Toggle	Expand menus to view more options
	Faxing	Fax documents and forms
	Feedback	Provide feedback to the platform developers
	Filter	Filter your results
	File	Provides a list of actions in Forms
	Folder	Contains documents, forms, etc.
	Font	Allows you to change font properties in Forms
	Forms	Store, organize, manage, access, and work with your Forms
	Help-Member Support	Contact CREA Member Support
	Help-Video Tutorials	View a context-specific Help Tutorial
	Help Dropdown	View a Help dropdown (list of Tutorial Videos)
	Help-Video Tutorials	View a list of Help Tutorials
	Help-Bottom of Screen	View a context-specific Help Tutorial/document
	Legacy Version	Return to previous version of CREA WEBForms®
	Lock	Lock/Unlock your Member Dashboard for customization
	Logout	Logout of CREA WEBForms®
	Mandatory	Mandatory tasks in the Tasks Widget
	Markups	Allows Strike-out, Line, Highlight, Redact & Annotate in Forms
	Document Markup	Allows you to markup forms in the Preview window
	Merge	Connect two or more documents into one
	Print	Allows to you to print forms from the Preview window
	Quick Start	Links to a Quick Start Guide
	Save	Save your changes to Details in a transaction
	Select	Click to select an item
	Setup	Manage transaction templates, notification options, and more
	Shortcut button	Displays shortcuts to Transactions, Feedback, & Member Support
	Slicer Tool	Allows you to split forms into pages in the Preview window
	Sort	Change order of listed item

	Tasks	Create, view, and edit list of tasks
	Transactions	Create, view, and edit your transactions
	Upload Document	Upload a document to CREA WEBForms®
	View Calendar	Change to a calendar view format
	View Grid	Change to a grid view format
	View List	Change to a list view format
	Zoom	Allow you to zoom in Forms

Helpful notes are indicated by blue italicized text.

Cautions are indicated by red italicized text.

Note: Because CREA WEBForms® is responsive, the appearance of some fields and toolbars may change, depending on the device being used.

Section A: Getting Started

CREA WEBForms® is an internet application. All you need to get started are

- A computer/device with an HTML5 compliant browser, and
- High-speed Internet access.

This section includes

System Requirements

Logging In

Quick Start Guide

System Requirements

What you need:

- Internet Explorer or Firefox if you use a PC
- Safari if you use a Mac
- IOS7 or higher and mobile Safari for iPhone and iPad
- The latest version of the Android OS for Android devices

TECHNICAL SUPPORT AND INQUIRIES REGARDING INSTANET SOLUTIONS SERVICES IS AVAILABLE 24/7/365 TOLL FREE at 800-668-8768 and VIA EMAIL TO tech@instanetsolutions.com

Supported Browsers

The forms editor uses HTML5 coding, the most modern version of HTML. Older computers that run Windows XP often still use older versions of the Internet Explorer (IE) browser, such as IE 8 and IE 9. These older browsers don't support HTML5.

To resolve this, you will need to download either the Chrome or Firefox browser. Both browsers are free.

Chrome is available at www.google.com/chrome.

Firefox is available at https://www.mozilla.org/en-US/firefox/desktop/.

Logging in

You can log in to WEBForms® through

webforms.ca

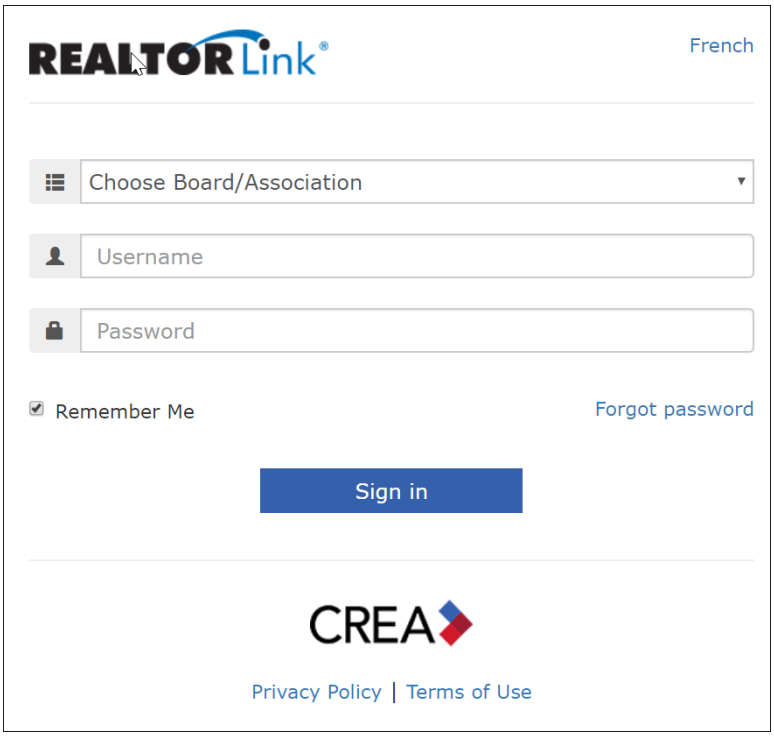
realtorlink.ca

Logging in to webforms.ca

To login directly to CREA WEBForms®:

1. Go to CREA WEBForms® (www.webforms.ca)

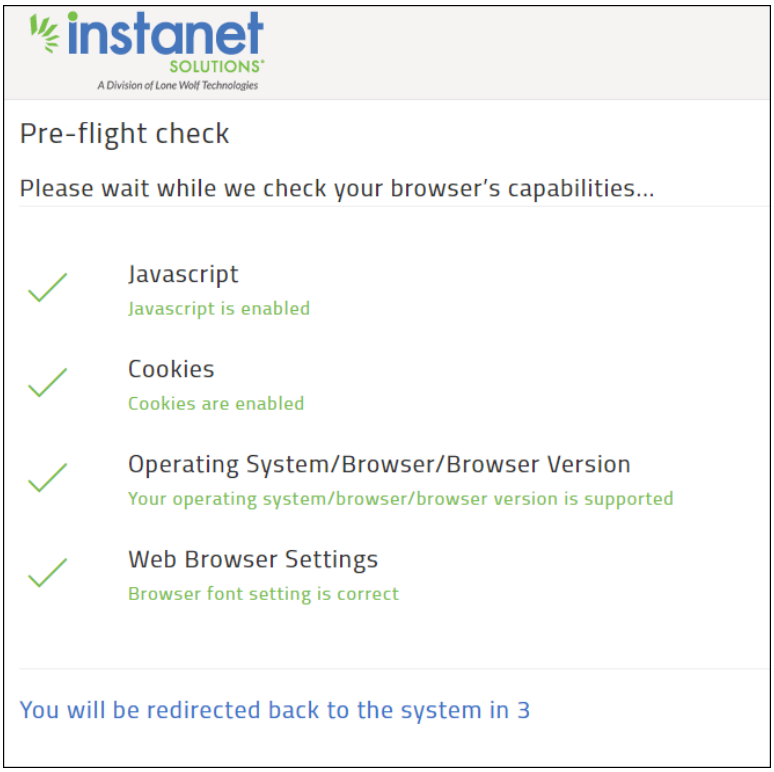
The REALTOR Link® NAF login window displays.



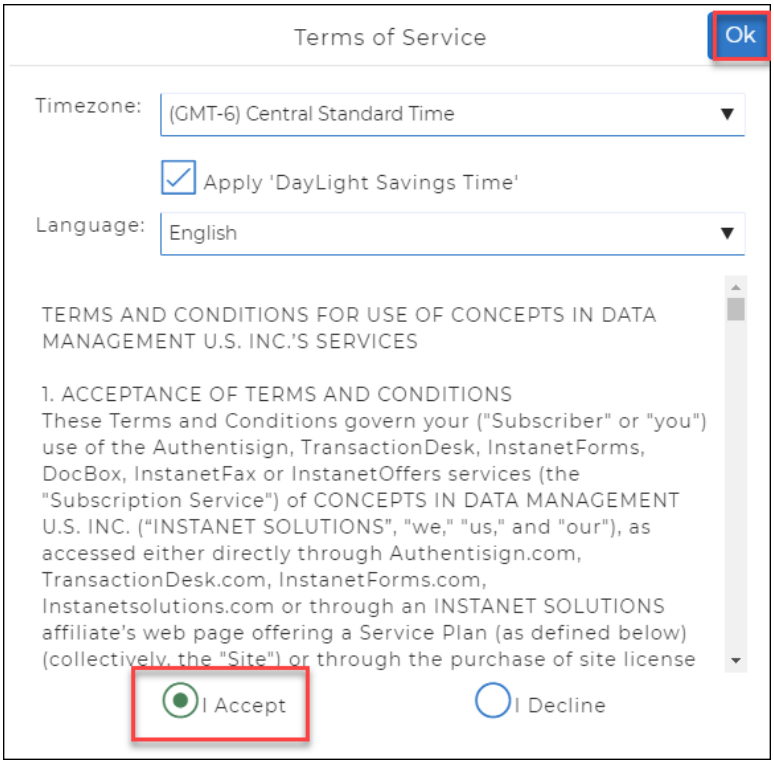
2. Enter your **Board/Association**, **User Id** and **Password**, and click **Sign in**.

   *Note: Select **Remember Me** when accessing WEBForms® on a personal computer to have REALTOR Link® remember your User Id and Board. This option is not recommended on a shared or public computer.*

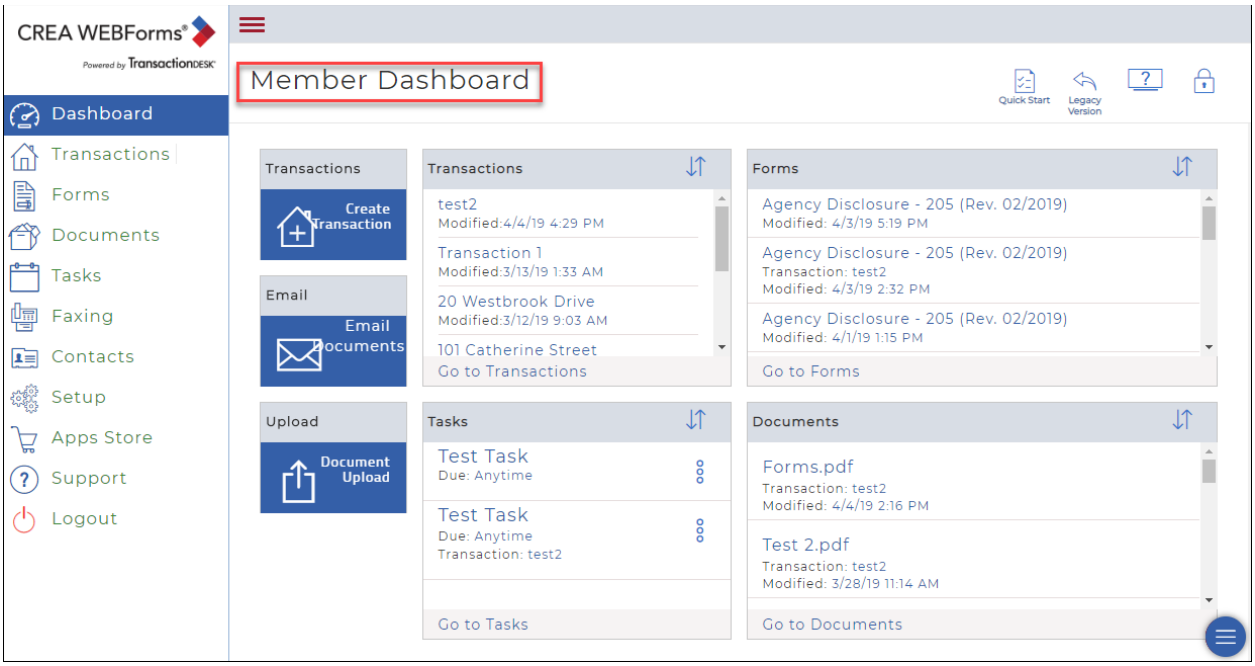
For first-time users: Your **Pre-Flight Check** displays, where the system checks your browser.



For first-time users: Your **Terms of Service** displays. Click **I Accept** to accept the **Terms of Service** (Note: Default is **I Decline**).



Your **CREA WEBForms® Home Page**, which is the **Member Dashboard** page, displays.

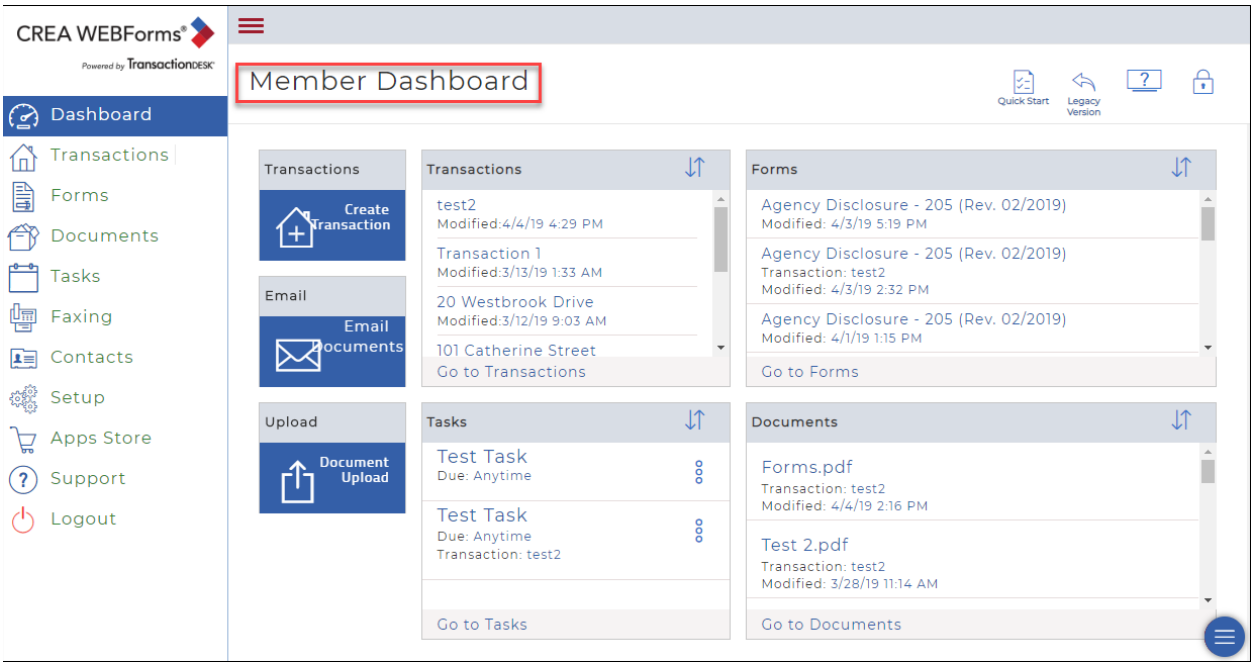


Logging in through realtorlink.ca

If you are already logged in to REALTOR Link®, you can go directly to WEBForms®.

On REALTOR Link®, in the top Banner, click **WEBForms®.**

Your **CREA WEBForms® Home Page**, which is the **Member Dashboard** page, displays.



QuickStart

CREA WEBForms® has made it easier than ever to get started working with your Transactions, with the Transaction Wizard.

The QuickStart videos will guide you through creating a new Transaction (Transaction Kit).

Watch the Quick Start Transaction Wizard Intro Video

Watch the Quick Start Transaction Wizard Step 1 Video

Watch the Quick Start Transaction Wizard Step 2 Video

Watch the Quick Start Transaction Wizard Step 3 Video

Watch the Quick Start Transaction Wizard Step 4 Video

Watch the Quick Start Transaction Wizard Step 5 Video

Navigate to the following sections in the Help Guide.

Creating a new Transaction (Transaction Kit)

Using the 5-step Transaction Wizard to edit a transaction

Inserting a clause into a form

Adding a form to a Transaction (Transaction Kit)

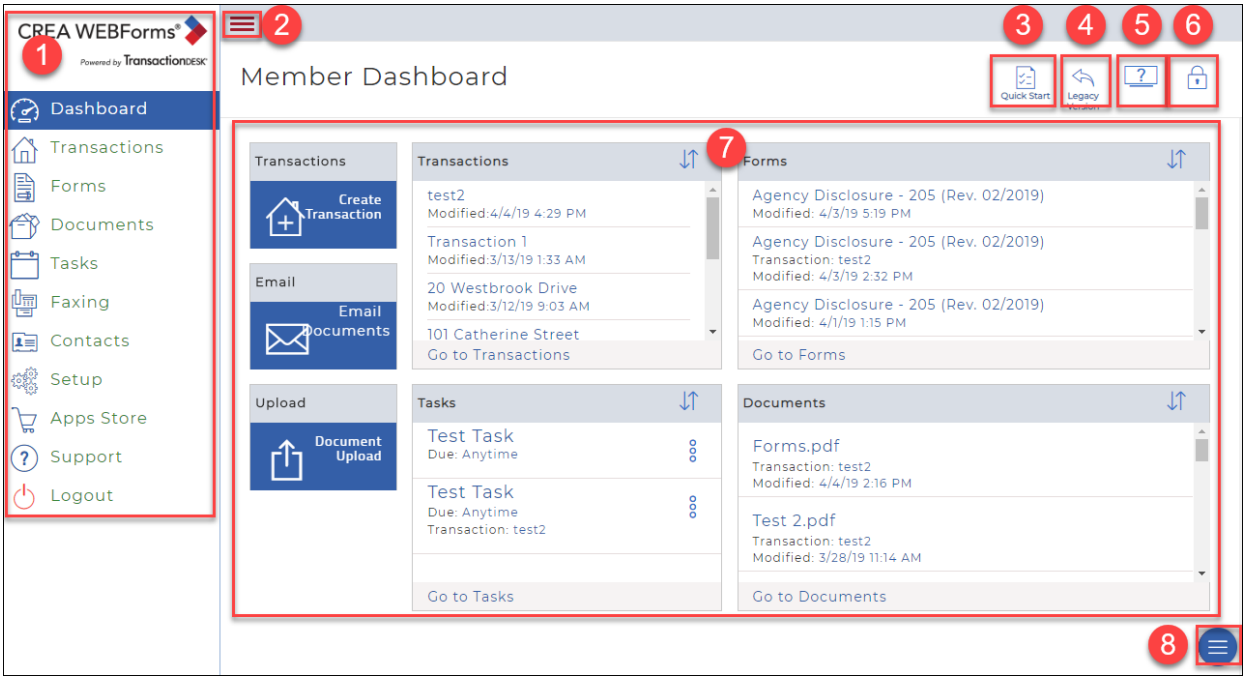
Section B: Navigating & Understanding CREA WEBForms®

In this section, you will learn to navigate the different areas of CREA WEBForms®. A brief explanation of some of the important components is included.

Member Dashboard

Use the dashboard to quickly see the status of your transactions and transaction-related information. Click the **Dashboard** icon to see your own personal dashboard.

The dashboard is completely customizable. You can choose the widgets to include in your dashboard, so that you can include the information that is most important to you.

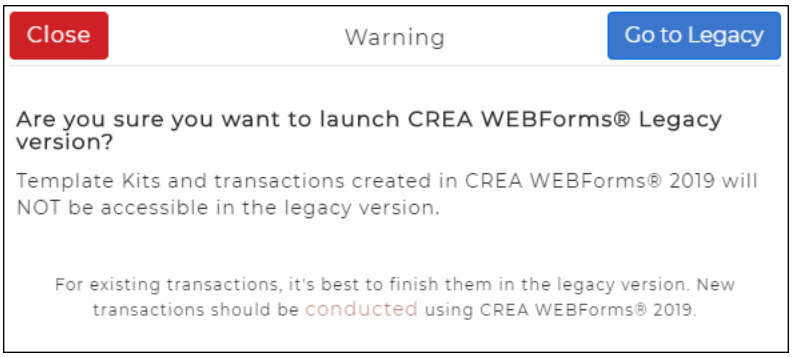


The CREA WEBForms® **Member Dashboard** has a few key areas and icons.

1. Sidebar
2. Sidebar toggle
3. Link to Quick Start
4. Link to CREA WEBForms® Legacy
5. Link to Help Videos
6. Dashboard Lock
7. Dashboard Widgets
8. Short-Cut Button

*Note: There will be a temporary icon on the top right to allow access to the **CREA WEBForms® Legacy** interface. This will be disabled at end of year 2019.*

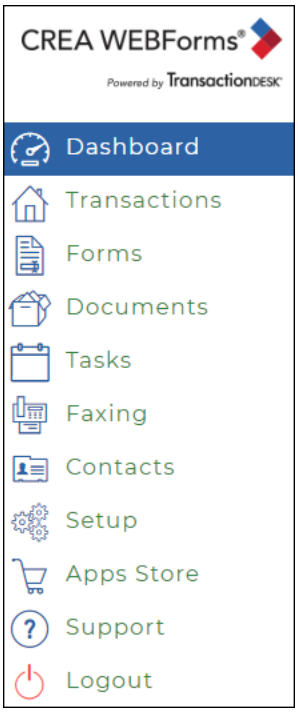
*In **CREA WEBForms®**, click **Legacy** Legacy Version on the top right to open the **CREA WEBForms® Legacy** interface.*



*A warning window will display, cautioning you that Transaction Templates and Transactions created in **CREA WEBForms® 2019** will not be accessible in the Legacy version. Click **"Go to Legacy"** if you still wish to switch back.*

*In the **CREA WEBForms® Legacy** interface, click **CREA WEBForms® 2019.***

Sidebar



The **Sidebar** lists icons linking to different tasks and workspaces, including:

Dashboard

The Dashboard is your main workspace (your home page). The initial one you see on login is the default workspace. This area is fully customizable, using widgets. Once you are familiar with the platform, you can arrange the dashboard to suit your needs.

Transactions

Transactions is the list of your transactions, or the transactions that are shared with you.

Forms

Forms represent legal contracts that are filled out interactively online.

Documents

Use Documents to store, organize, manage, access, and work with your documents.

Note: Once a form is filled out and sent back to you, you will find it in Documents.

Tasks

The Task Manager lets you create lists of standalone tasks that can be assigned to you, or to another member of your team, or to someone in your office.

Faxing

This lets you create fax cover sheets ready to send with documents or forms.

Contacts

Contacts lets you build your list of contacts online.

Setup

Use the Setup options to manage system defaults, such as default dashboards that salespersons see, standard checklists for the various types of transactions, transaction templates, notification options, and more.

Apps Store

Purchase third party apps, such as Esignature apps, here.

Support

Access CREA's Member Support here.

Logout

Click this link to log out of CREA WEBForms®.

Note: You should log out every time you are done working with WEBForms® to ensure your private and secure access.

Expand Menu / Sidebar toggle

Click this icon to expand a menu. This icon will display in different parts of the platform.

Link to Help Videos

Click this link to view the list of Tutorial Videos.

Dashboard Lock

The Dashboard lock allows you to unlock the dashboard so that you can customize your workspace with widgets. Once you are done customizing your workspace, you can then lock your dashboard.

Dashboard Widgets

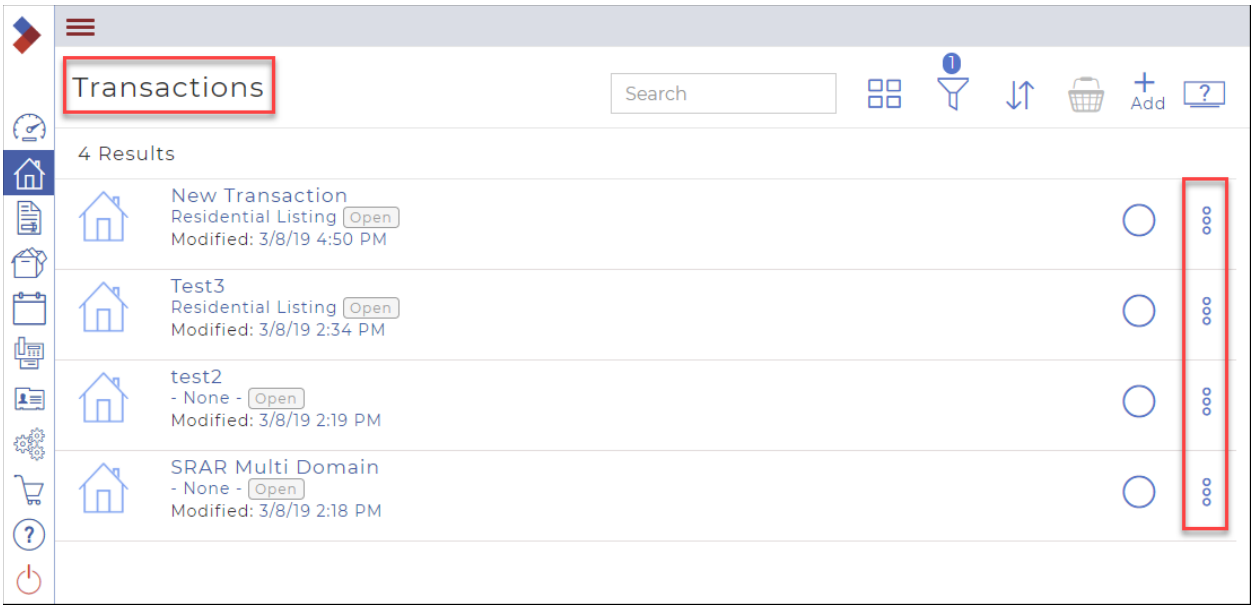
Your fully customizable dashboard workspace consists of several widgets. You can add, move, resize, and delete widgets.

Short-Cut Button

Click this to display shortcuts to **Transactions**, **Feedback**, & **Member Support.**

Transactions

Transactions (formerly referred to as Transaction Kits) is the list of your transactions, or the transactions that are shared with you. Transactions are a way for you to group and manage all the forms you need for a specific transaction.

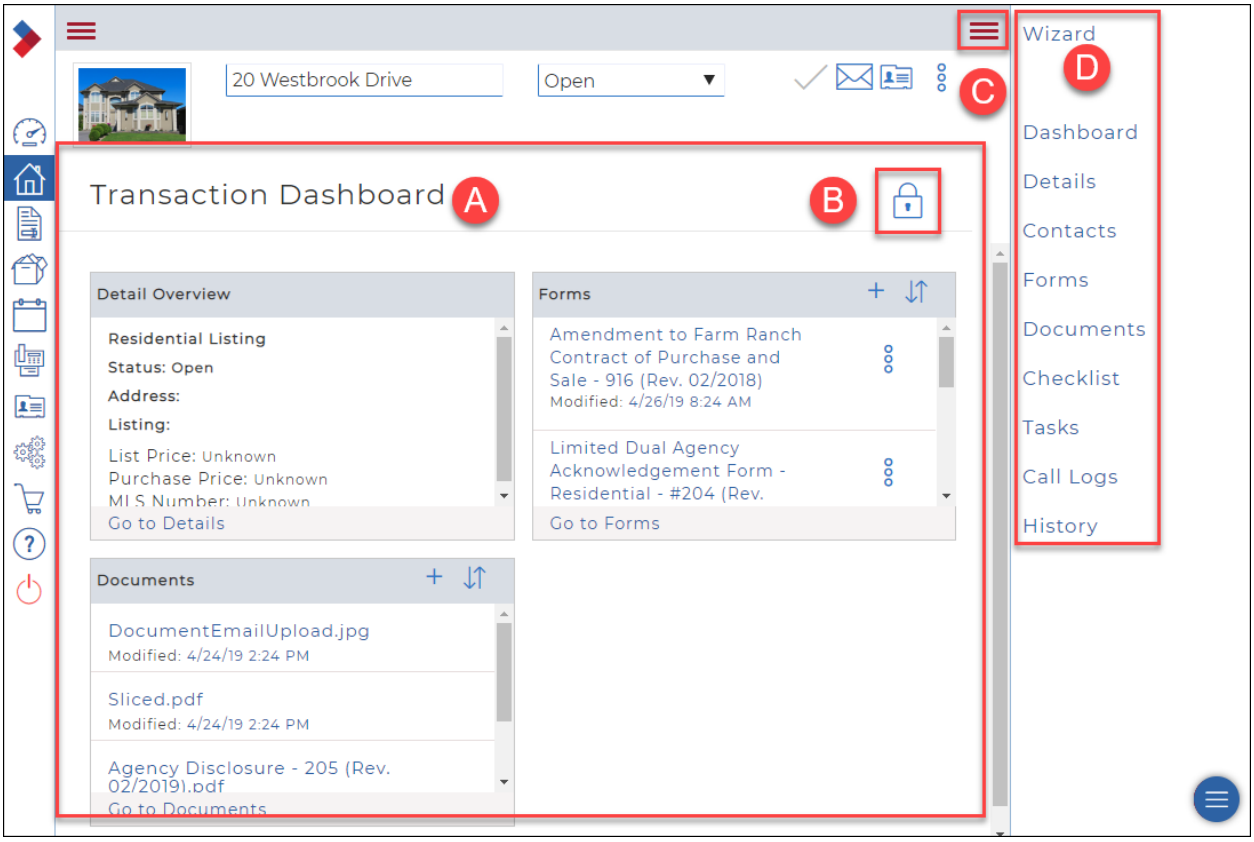


Here, you can view transactions and their status, or you can create new transactions by clicking **Add +.**

When you see a transaction in the list, you see the photo thumbnail, the name of the transaction and its status, and the last modified date.

You can also view the details of a transaction, such as the contacts, forms, documents, checklist, tasks, or signings, and you can also see the history of a transaction, all from the **More Options** menu ⋮ to the right of the transaction names.

When you click the name of a transaction, the **Transaction Dashboard** displays.



A. Transaction Dashboard

The Transaction Dashboard displays the details for a specific Transaction. It is fully customizable by using widgets.

B. Dashboard Lock

To customize your dashboard, click the **Lock** icon to unlock it. You can then drag and drop, resize, or delete widgets from your dashboard. Click the **Lock** icon again to relock your dashboard.

Right Menu Toggle

You can open and close the right menu using this toggle.

C. Right Menu

This menu displays links to different steps of the Transaction Wizard and other actions.

Forms

Forms represent legal contracts that are filled out interactively online. They are usually provided by your board, association, or broker, and are reviewed to ensure compliance and protect all involved parties legally.

Use Forms to store, organize, manage, access, and work with your forms.

Forms provides a form library for your MLS® System board and brokerage forms.

When you attach a form to a transaction, the system can automatically fill in many of the form fields for you, saving you time and preventing errors in form filling.

In the system, a form is distinct from a document. Documents are any type of information other than a form that you collect regarding the deal from your client or other third party. Documents are not interactive, and where applicable, are filled in outside of the system. Listing photos, scanned pen-and-paper contracts, scanned receipts

of deposit checks, commission disbursements, lawyer letters, commission statements, and client profiles are common examples of documents.

Use Documents to store, organize, manage, access, and work with your documents. Consider Documents as your system inbox, where you receive and store documents until you need them for a transaction.

You can store documents in Documents in the following file formats:

- .pdf
- .doc
- .docx
- .xls
- .xlsx
- .jpg/.jpeg
- .gif
- .bmp
- .tif
- .png

Documents organizes documents in four main folders, each with its own unique purpose:

- The **Inbox folder** contains documents that are mailed to one of your transactions.
- The **My folder** contains any documents you manually upload.
- The **Shared folder** contains any documents that other users share with you.
- The **Transaction folder** contains documents that are attached to your transactions.

Tasks

Tasks lets you create lists of standalone tasks that can be assigned to you, or to another member of your team, or to someone in your office. If applicable, you can assign a specific due date for a task.

Tasks can also be created as part of a checklist. When the checklist is attached to a transaction that you own or that is shared with you, those tasks are also displayed here.

The tasks displayed include the standalone tasks that are assigned to you, or shared with you, plus the list of tasks that are associated with any transactions you own or that are shared with you.

Tasks that are part of a transaction display with the transaction name in the list of tasks. Tasks without a transaction name displayed are standalone tasks. If a task has a due date, the due date also displays with the task name in the list of tasks.

You can filter the list of tasks to display only those open tasks, only those tasks that are assigned to you, etc.

Faxing

This lets you create fax cover sheets ready to send with documents or forms. Simply select the contact to send the fax to, add a message, and create and download the cover sheet.

Contacts

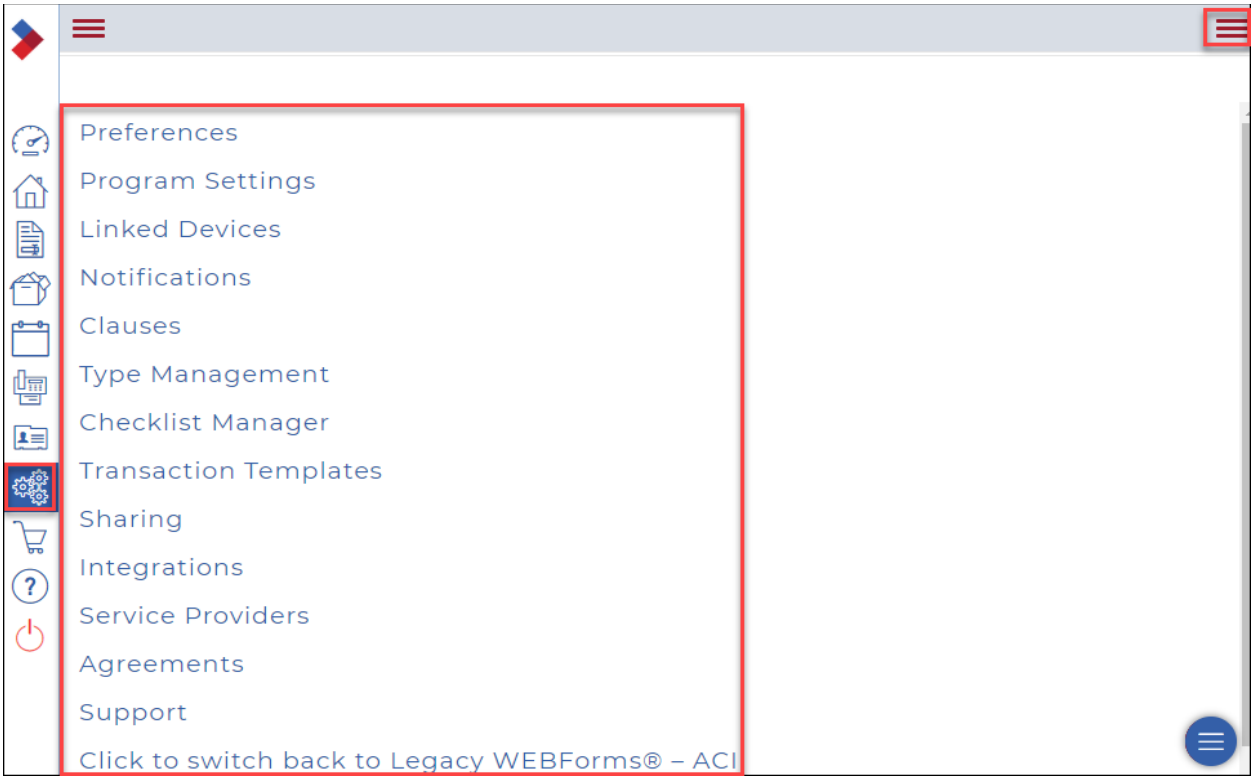
Contacts lets you build your list of contacts online. Then, whenever you need to include a contact in a deal, or email or fax a contact, the information is at your fingertips.

Setup

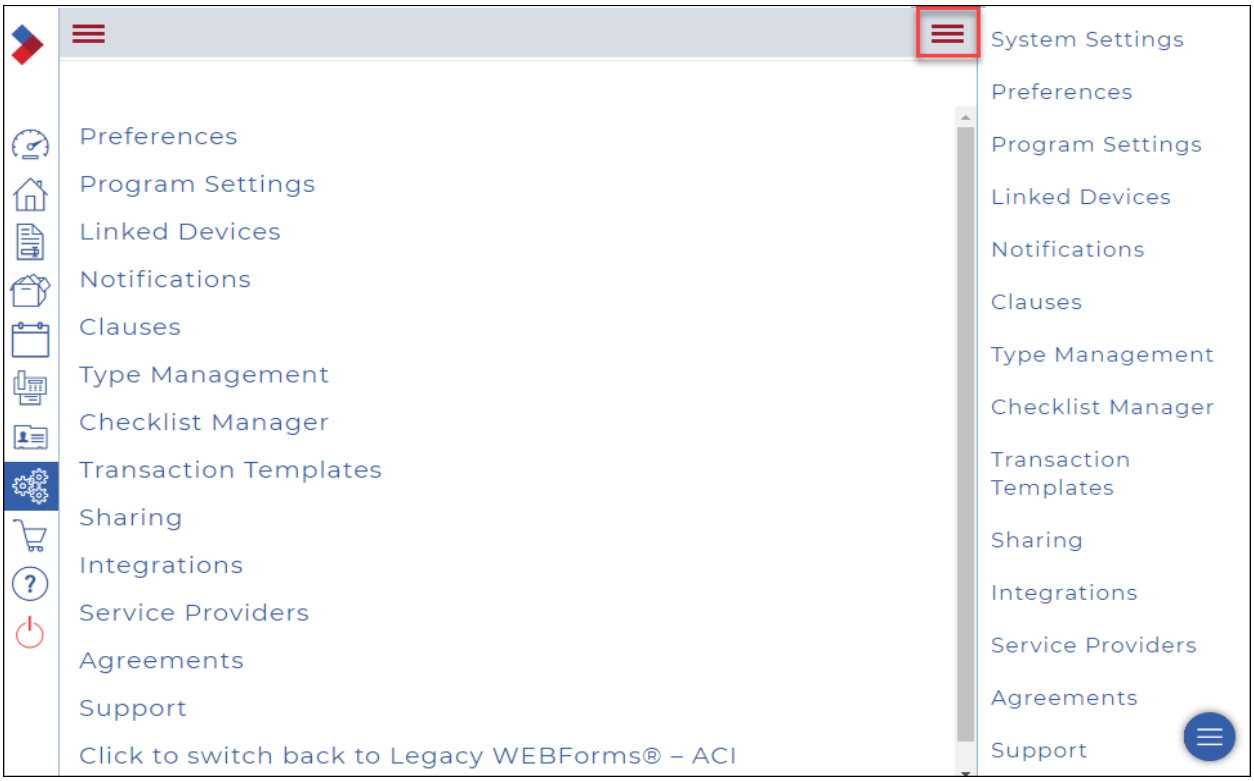
Use the Setup options to manage system defaults, such as default dashboards that salespersons see, standard checklists for the various types of transactions, transaction templates, notification options, and more.

To view **Setup** options:

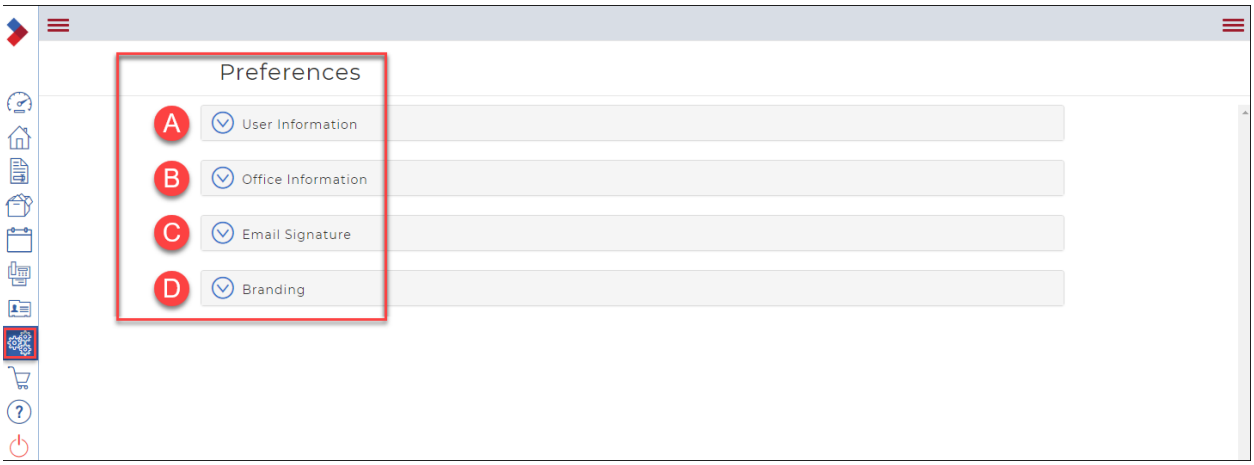
1. In the left Sidebar, click **Setup** .
   The **Setup** menu displays.



2. Click **Expand Menu** to expand the right menu.
   The S**etup** menu now displays on the right, to help you navigate through the options.

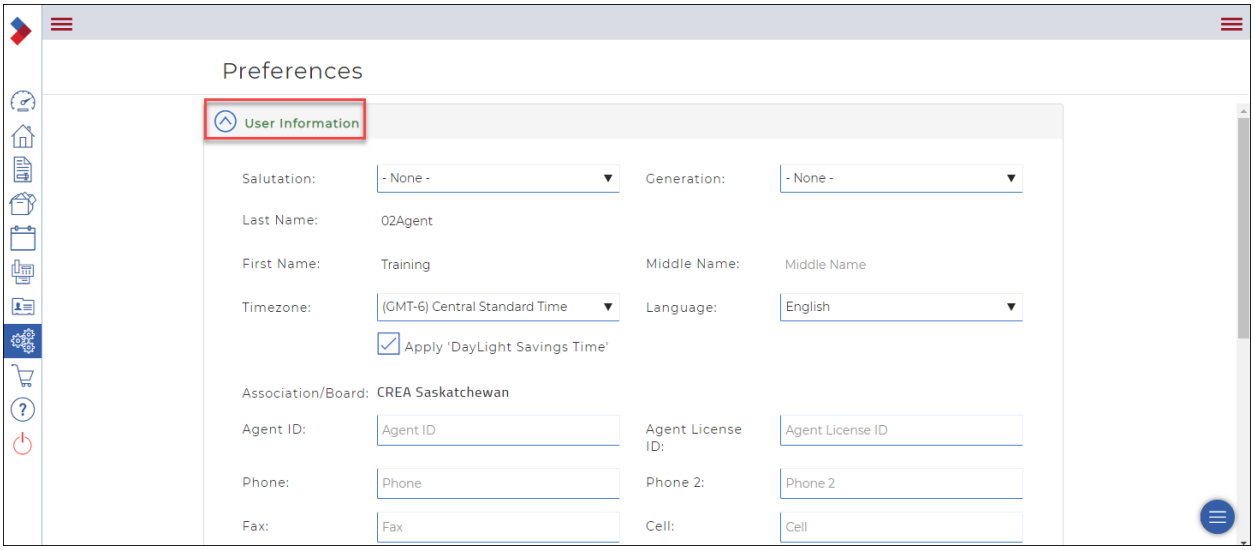


Preferences



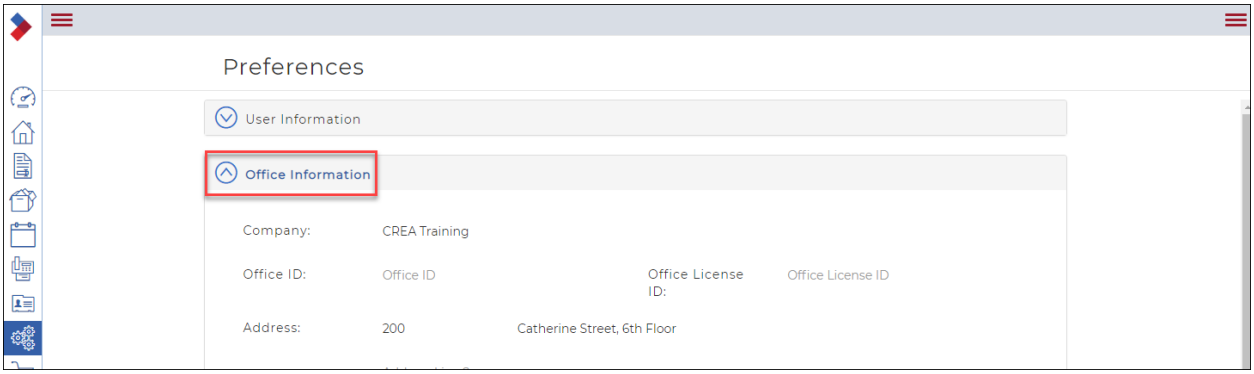
A. Click **User Information** to view and edit your personal user profile.
Here you can edit several fields.

Note: Some of the fields are automatically populated with information from your Board's MLS® System, and are therefore not editable.



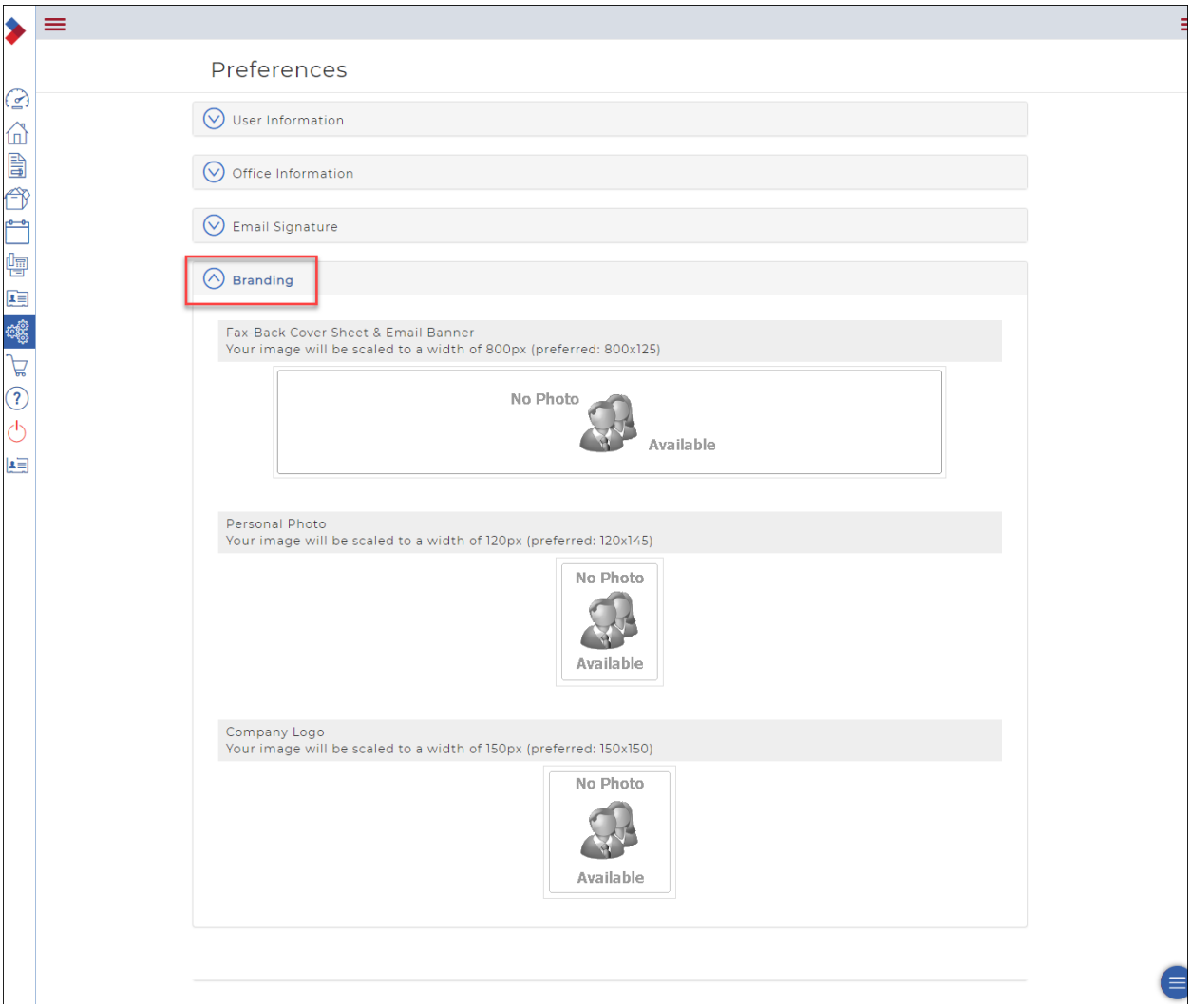
B. Click **Office Information** to view and edit your office information.

Note: Some of the fields are automatically populated with information from your Board's MLS® System, and are therefore not editable.

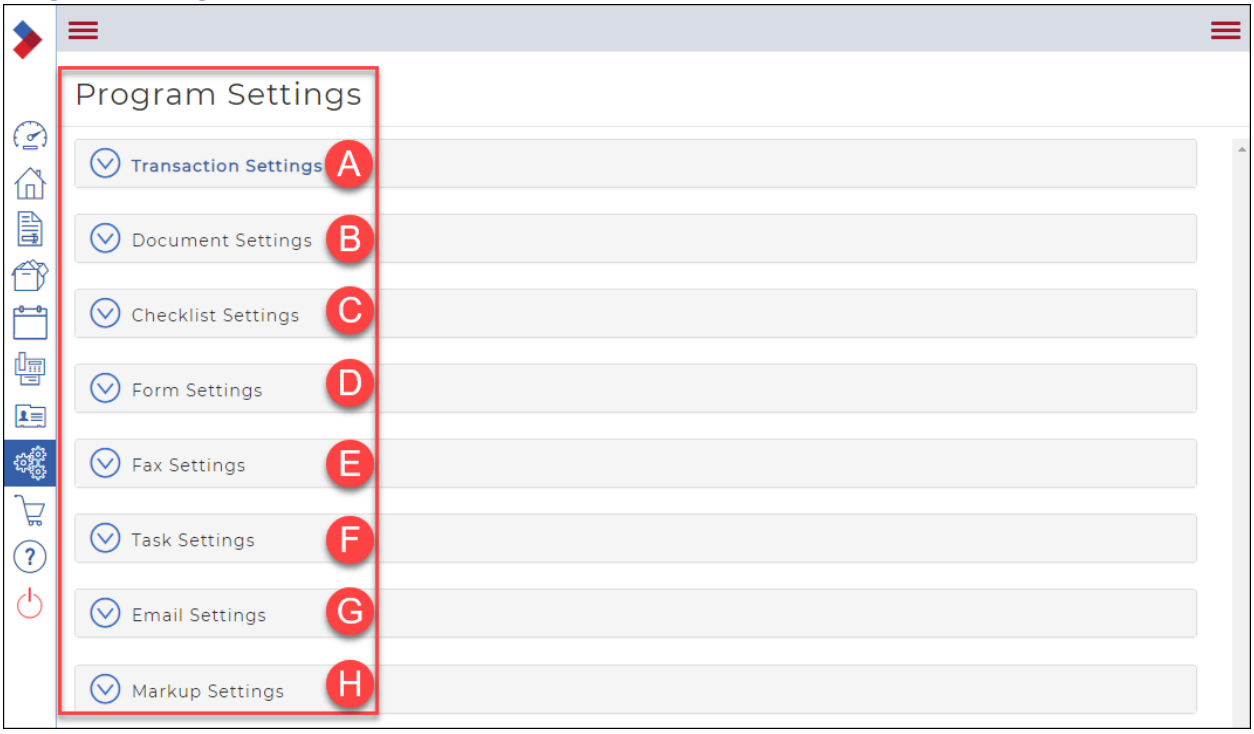


C. Click **Email Signature** to add or update your email signature. This contact information is automatically included in your email message box for all emails sent through CREA WEBForms®

D. Click **Branding** to add images for your Fax-back Cover Sheet, Email Banner, Personal Photo, and Company Logo.


Preferences
User Information
Office Information
Email Signature
Branding
Fax-Back Cover Sheet & Email Banner
Your image will be scaled to a width of 800px (preferred: 800x125)
No Photo
Available
Personal Photo
Your image will be scaled to a width of 120px (preferred: 120x145)
No Photo
Available
Company Logo
Your image will be scaled to a width of 150px (preferred: 150x150)
No Photo
Available

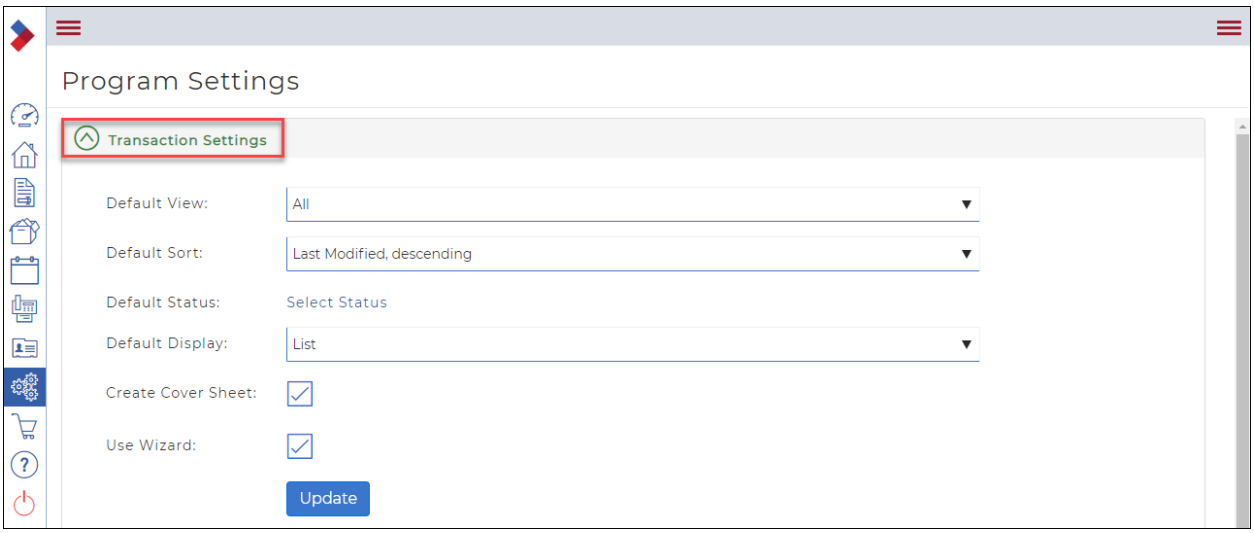
Program Settings



The system provides several general program settings that affect all users. These settings define how users see and interact with transactions, documents, checklists, forms, faxes, tasks, and emails.

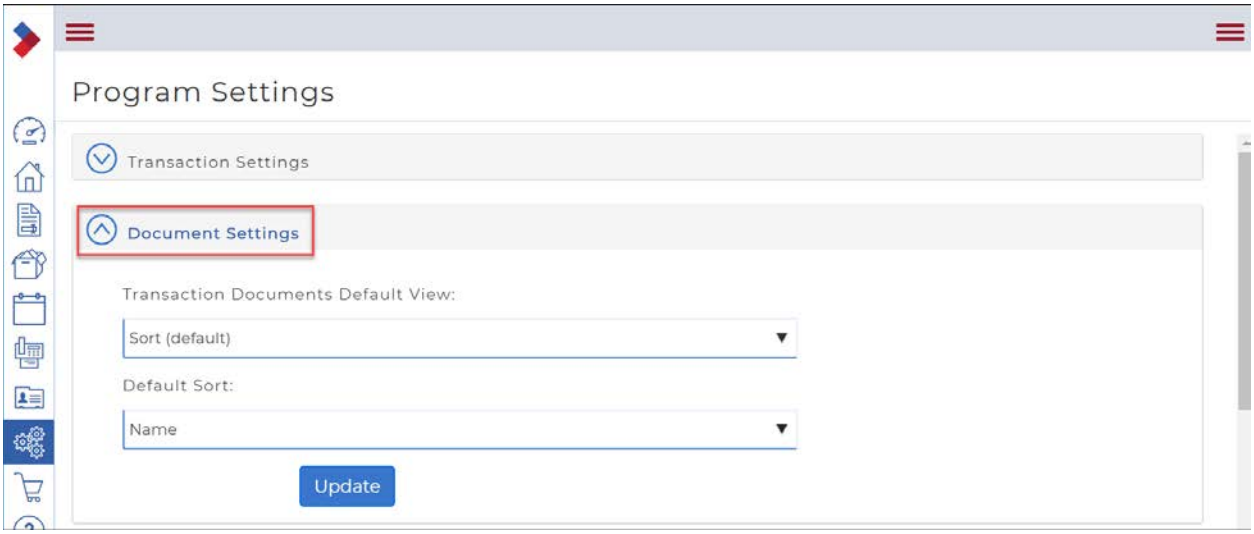
A. Click **Transaction Settings** to configure transaction settings, such as the default views, sorting, and display formats, and other transaction-specific settings for the entire office. When you have finished making changes to the transaction settings, click **Update**.

CLICK TO VIEW VIDEO

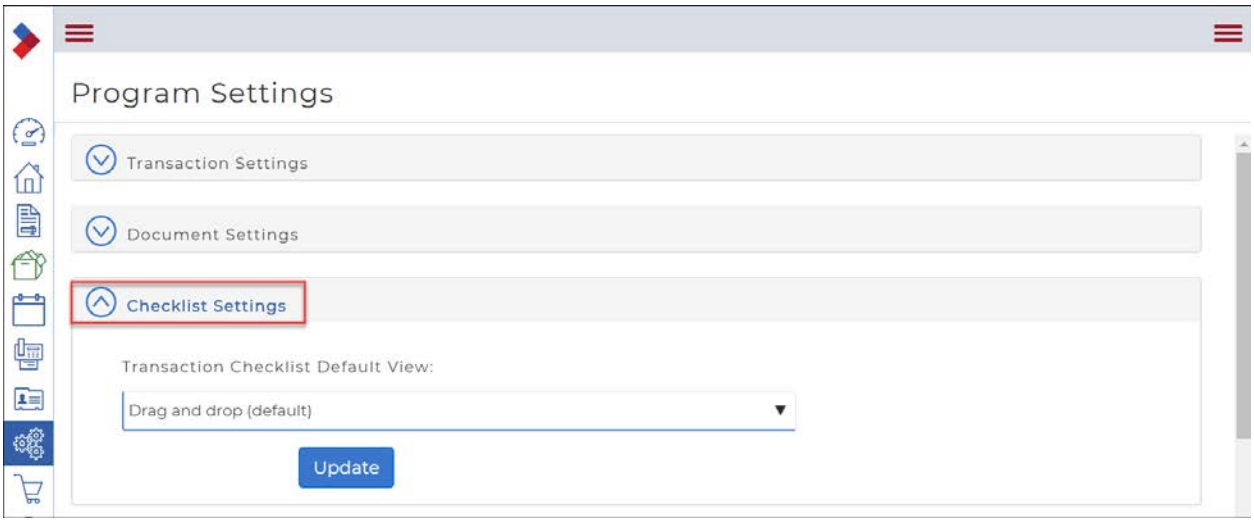


B. Click **Document Settings** to configure the default transaction document settings, such as whether to sort them alphabetically. When you have finished making changes to the document settings, click **Update**.

CLICK TO VIEW VIDEO



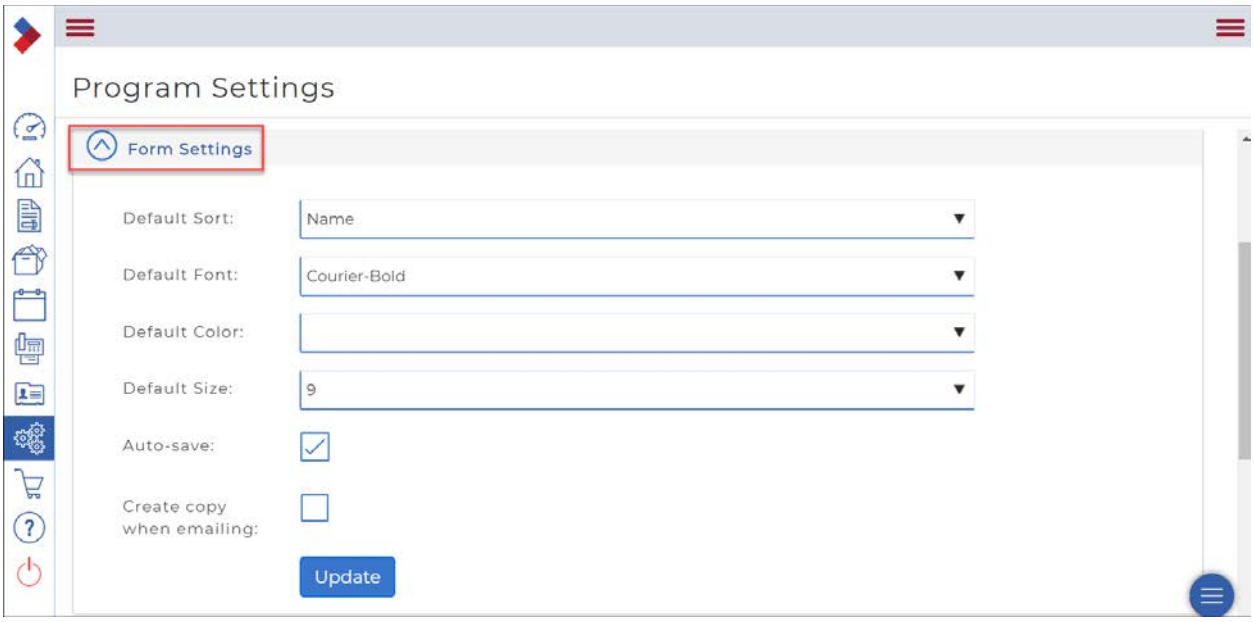
C. Click **Checklist Settings** to configure the default checklist view, such as whether to sort checklist items in a transaction alphabetically. When you have finished making changes to the checklist settings, click **Update**.



D. Click **Form Settings** to configure the default form settings, such as what field to sort on, fonts and colors to use, and whether to automatically save a copy. When you have finished making changes to the form settings, click **Update**.

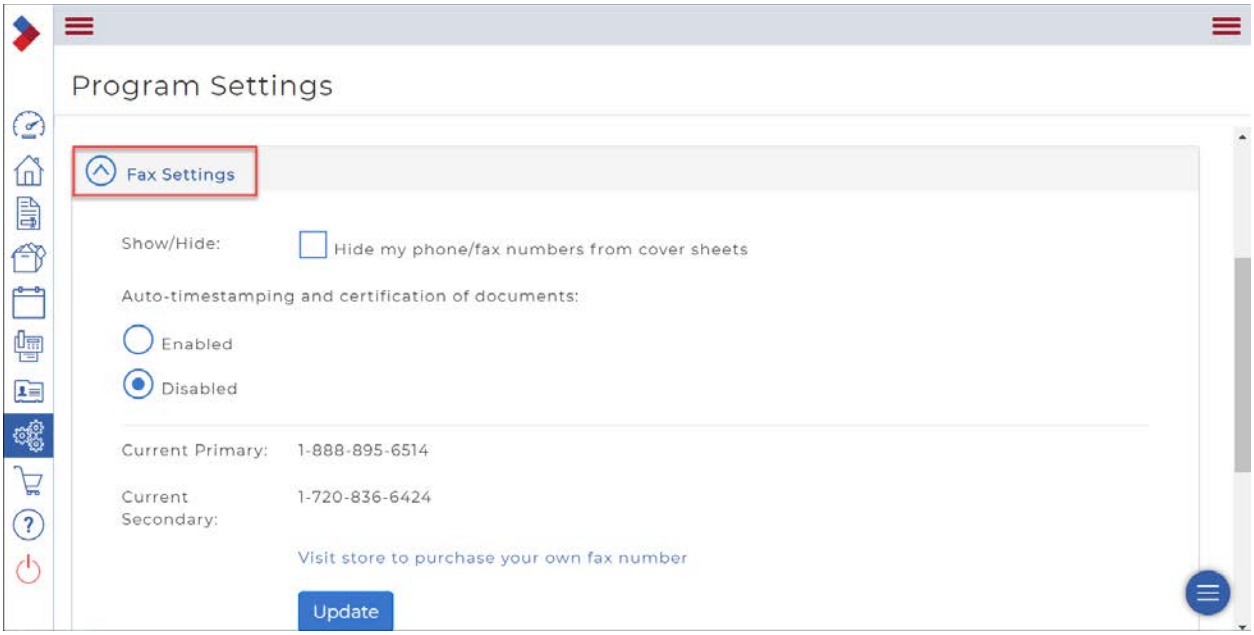
Note: You can also change the font on a specific form by using the fonts icon in the text editor while editing that form.

CLICK TO VIEW VIDEO

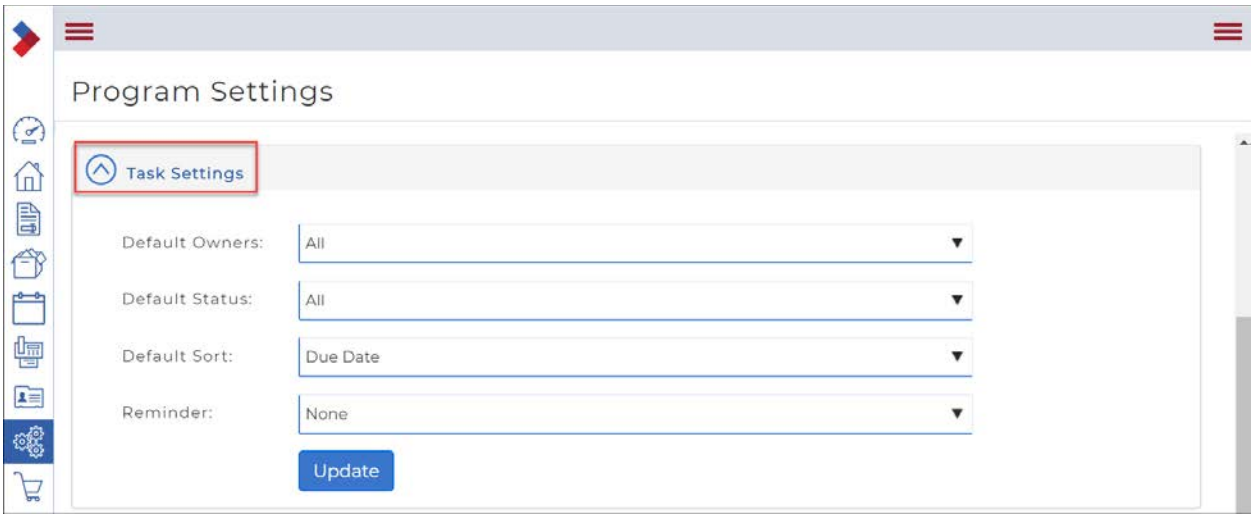


E. Click **Fax Settings** to configure the default fax settings, such as whether to include phone and fax numbers on cover sheets, and whether to time stamp and certify documents. When you have finished making changes to the fax settings, click **Update**.

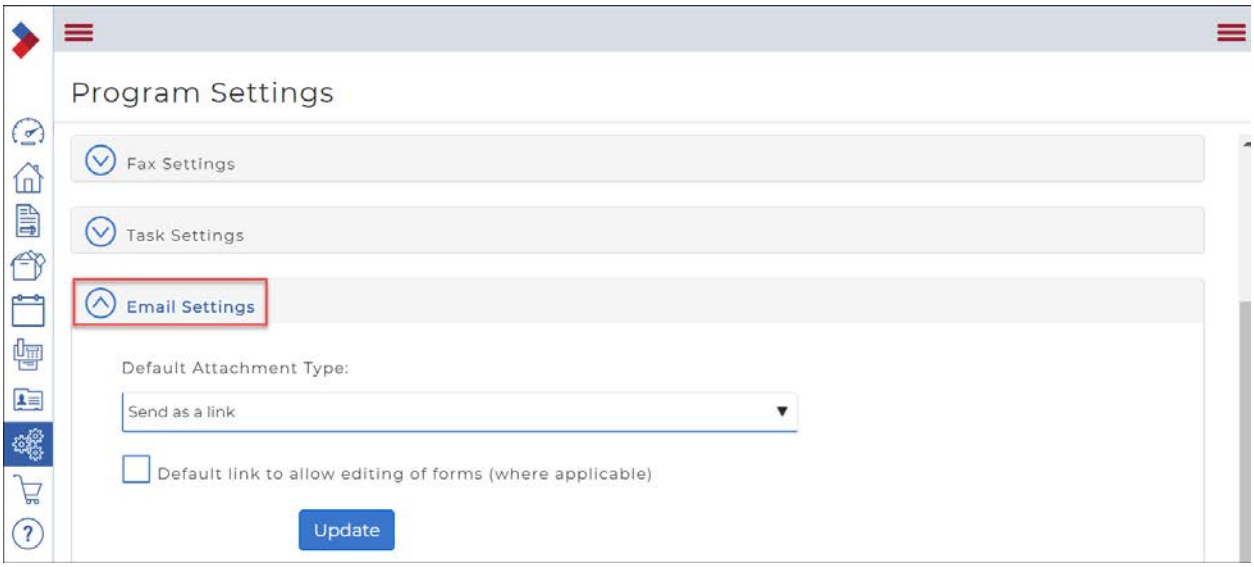
CLICK TO VIEW VIDEO



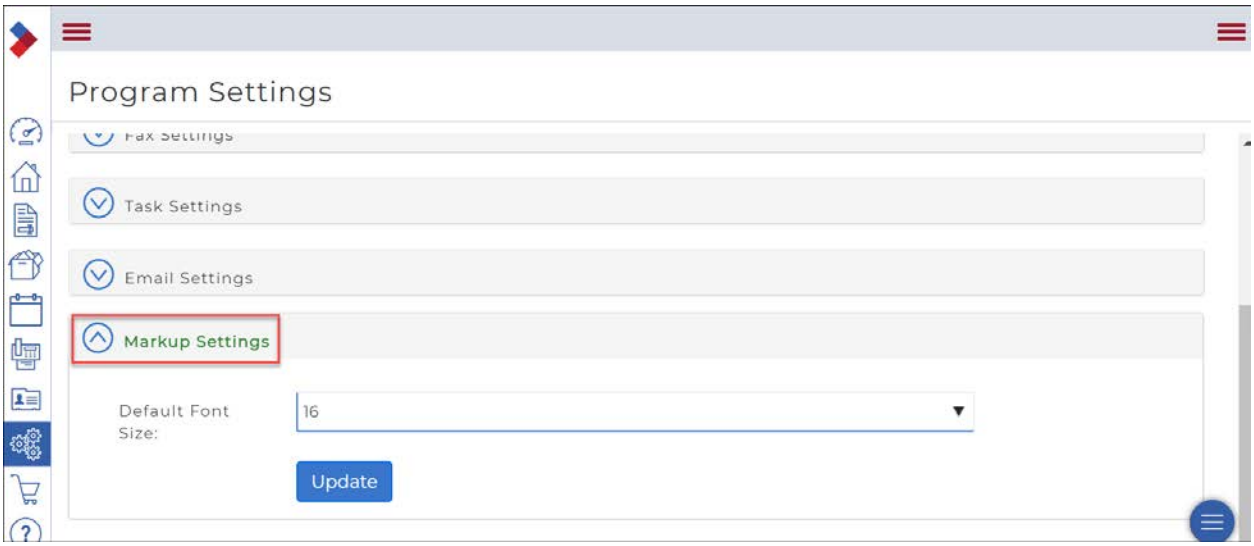
F. Click **Task Settings** to configure the default task settings, such as the default owner, default status, sort order, and whether to send a reminder. When you have finished making changes to the task settings, click **Update**.



G. Click **Email Settings** to configure the default email settings, such as how to send attachments, and whether to allow editing of attachments. When you have finished making changes to the email settings, click **Update**.



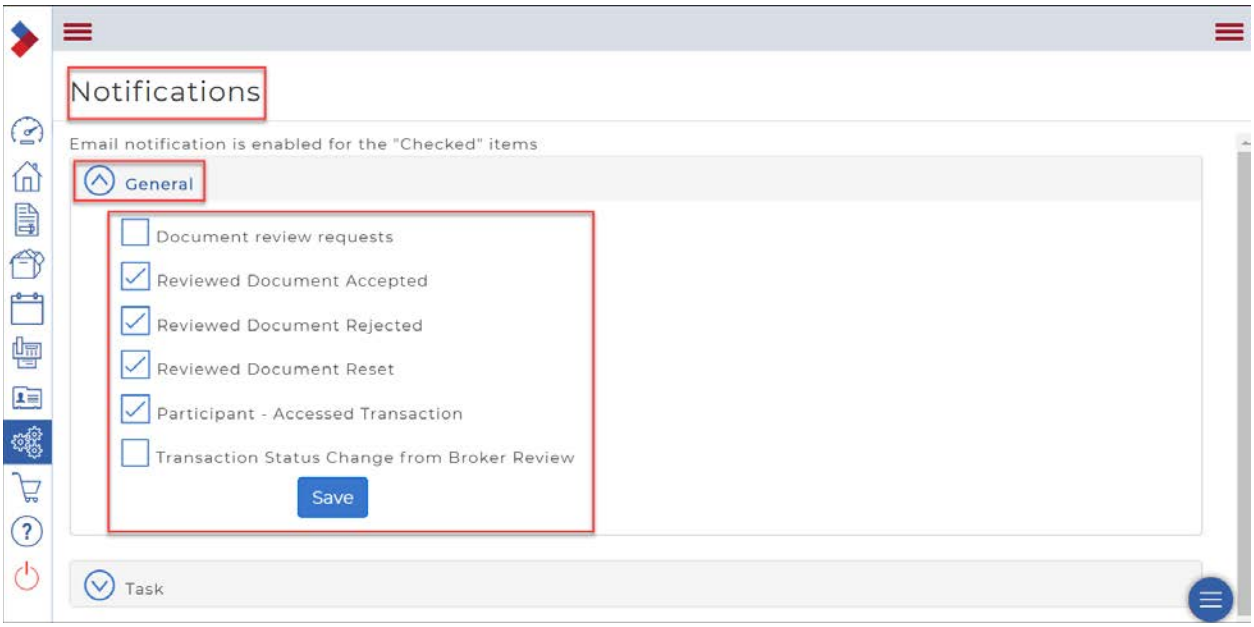
H. Click **Markup Settings** to configure the default markup settings, such as the default font size. When you have finished making changes to the markup settings, click **Update**.



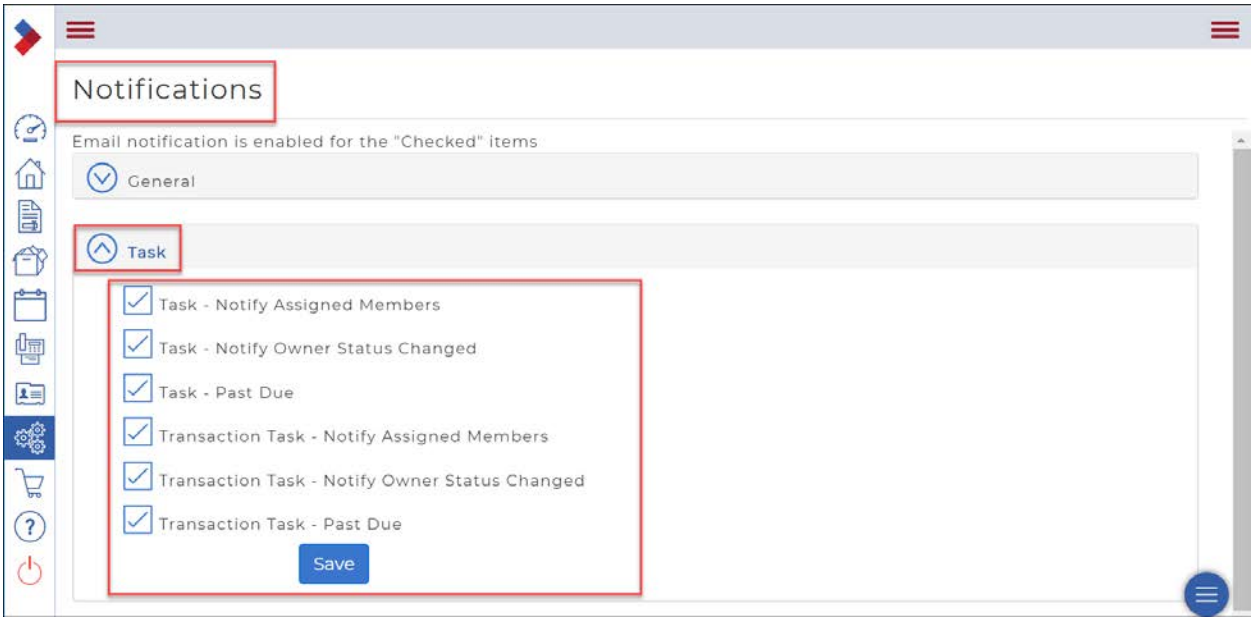
Notifications

You can have the system notify users automatically by email when certain events take place. There are two options under which you can selection items:

General Notifications



Task Notifications



Clauses

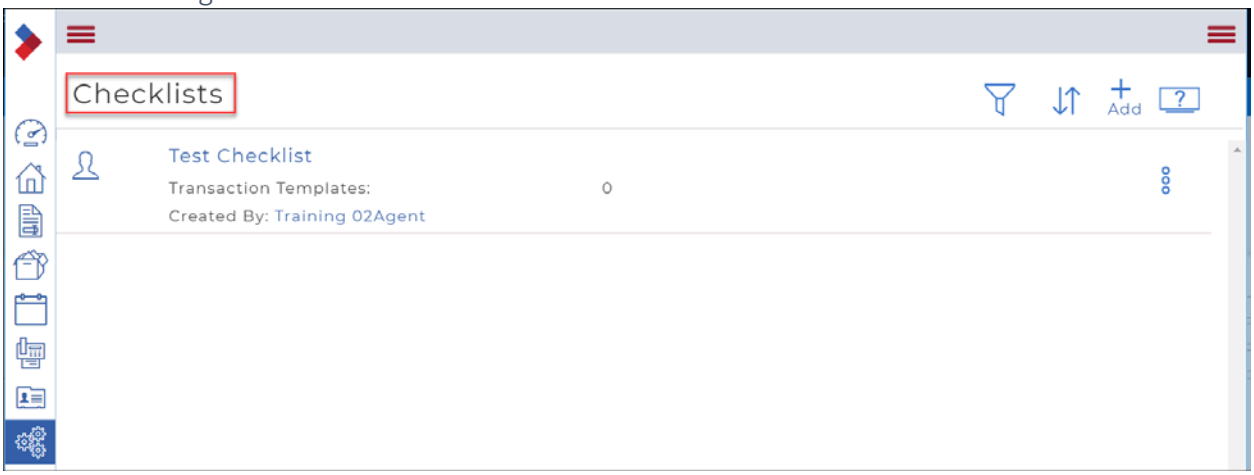
You can create standard clauses that can be reused in multiple documents. You can create clauses for your own personal use, or for the other salespersons in the office to use. You can also view system clauses that are available to all members of your board or association.

You can organize the clauses you create into folders, so they are easy to locate.

Type Management

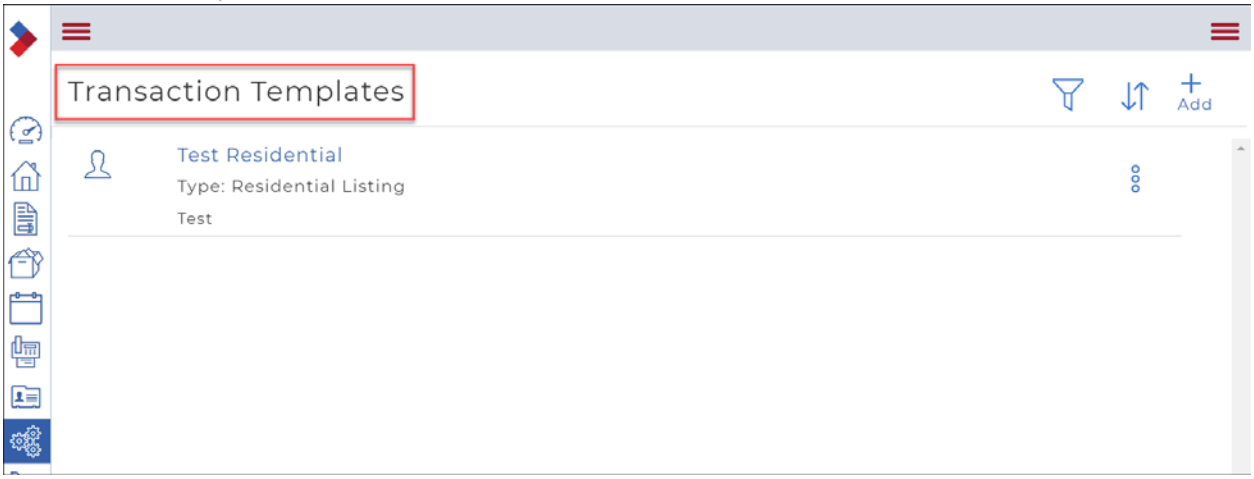
The system provides out-of-the-box types for the various kinds of data in the system, such as contact types, document types, transaction types, and so on. These are referred to as System Types. You can add your own types to the list.

Checklist Manager



Having checklists for each of the key types of transactions you create can save you a lot of time. The checklist provides a list of things you need to do, or documents you need to gather to complete a deal, and any tasks that need to be completed for the deal. Checklist items can be mandatory or optional.

Transaction Templates



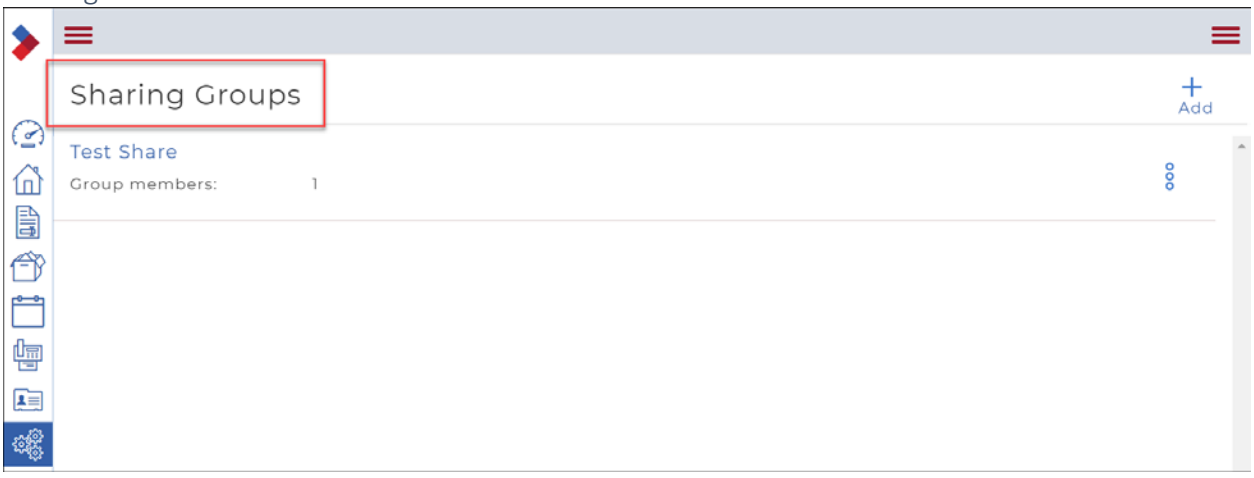
A transaction template defines a standard set of forms, documents, and checklist items that simplify the process of creating a transaction.

For example, you have certain forms and documents required for a residential listing. You also have a list of tasks that apply to most residential listings. You can create a template called “Residential Listings” and attach the forms and documents, and a checklist to it. Then, each time you create a transaction for a residential listing, you only need to apply the Residential Listings template: All the forms, documents, and checklist items required are automatically added to the transaction.

As a salesperson, you can share a transaction template with your team members using the Sharing option, if the team has already been defined.

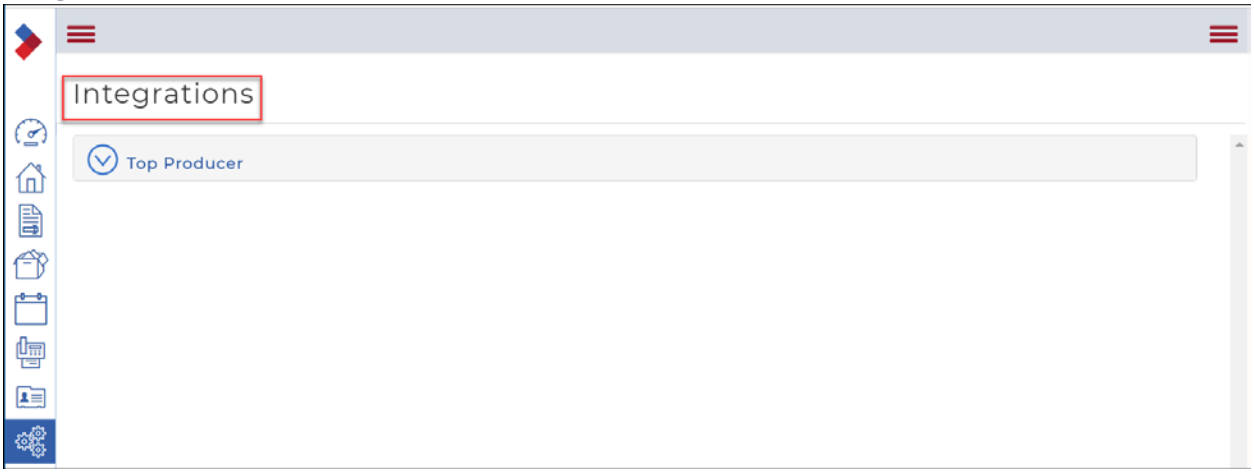
Note: You require the full Broker Edition to create transaction templates for an office.

Sharing

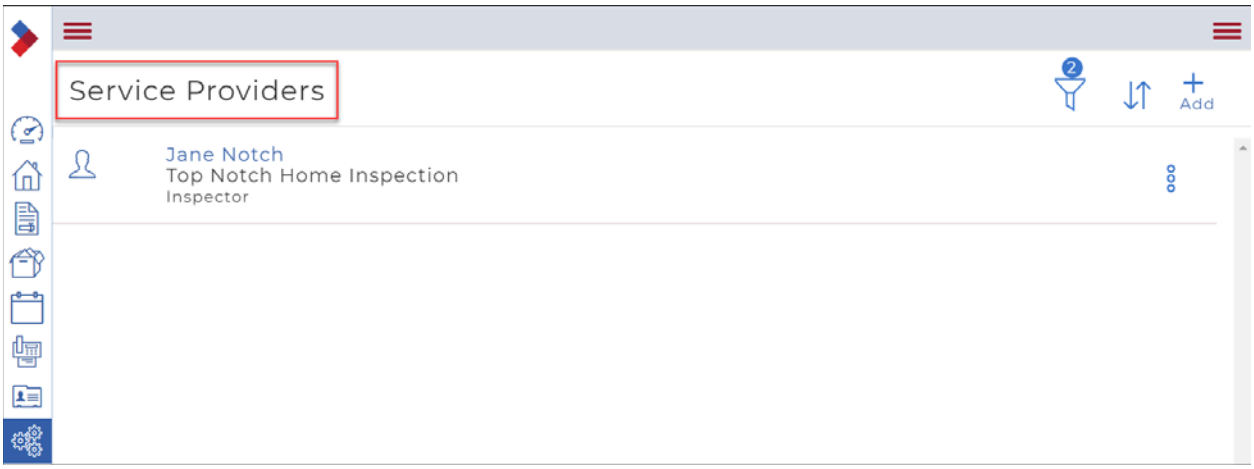


Many brokerages have teams of salespeople that work together on some or all deals. Before salespeople can share transactions in the system, the salespeople must be added to the same “sharing group / team”. Every salesperson can create a sharing group or team and add or remove salespeople as needed.

Integrations

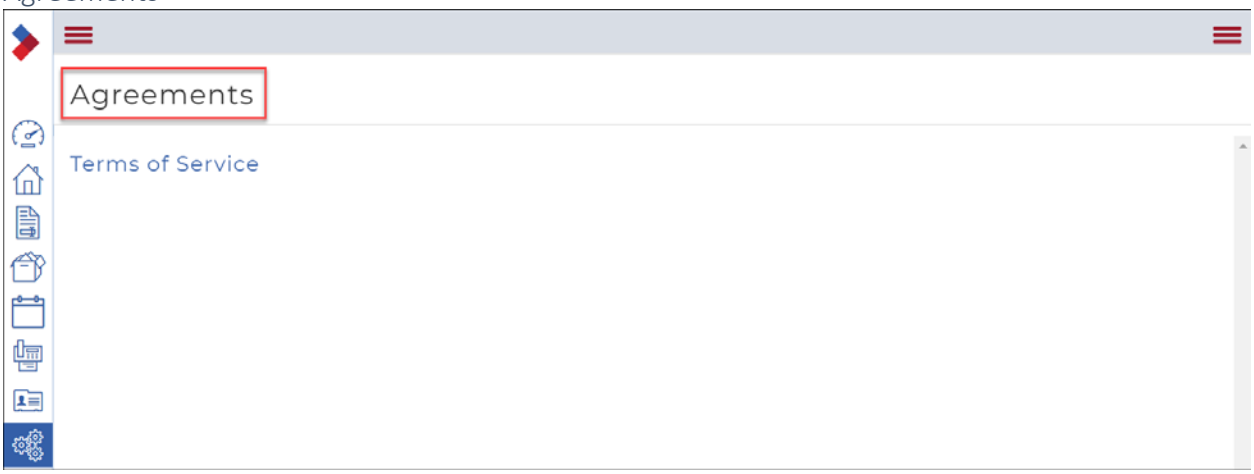


Service Providers



Save time by adding the service providers, such as appraisers and mortgage brokers, in the system, rather than adding them into individual transactions as required.

Agreements

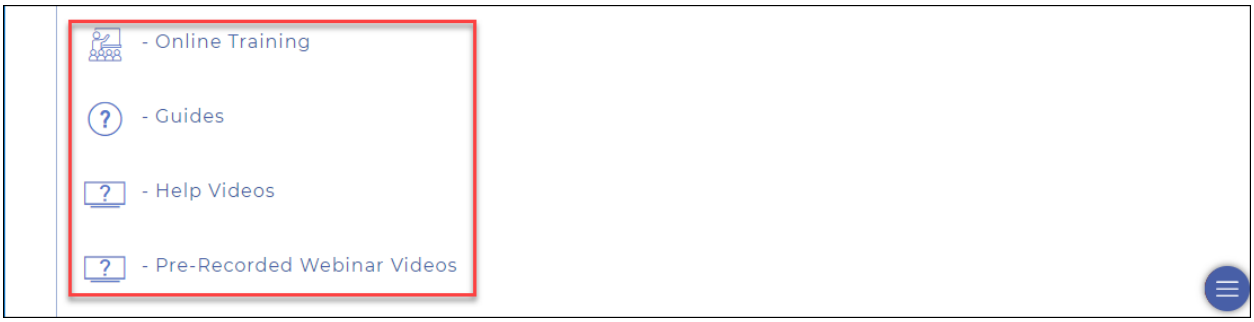


The Authentisign, TransactionDesk®, InstanetForms, DocBox, InstanetFax or InstanetOffers Terms of Service can be viewed here.

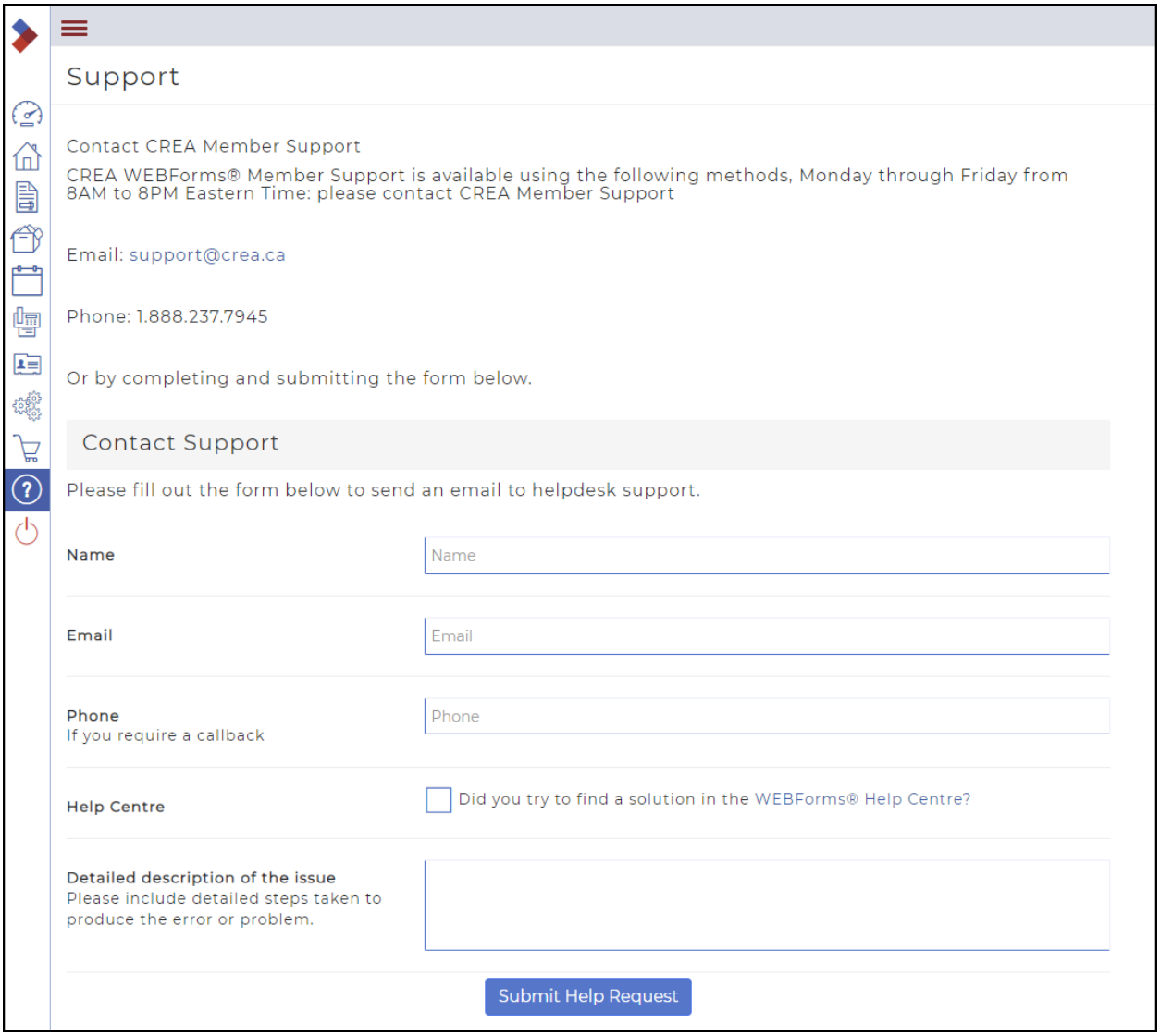
Support

CREA provides several levels of support, including:

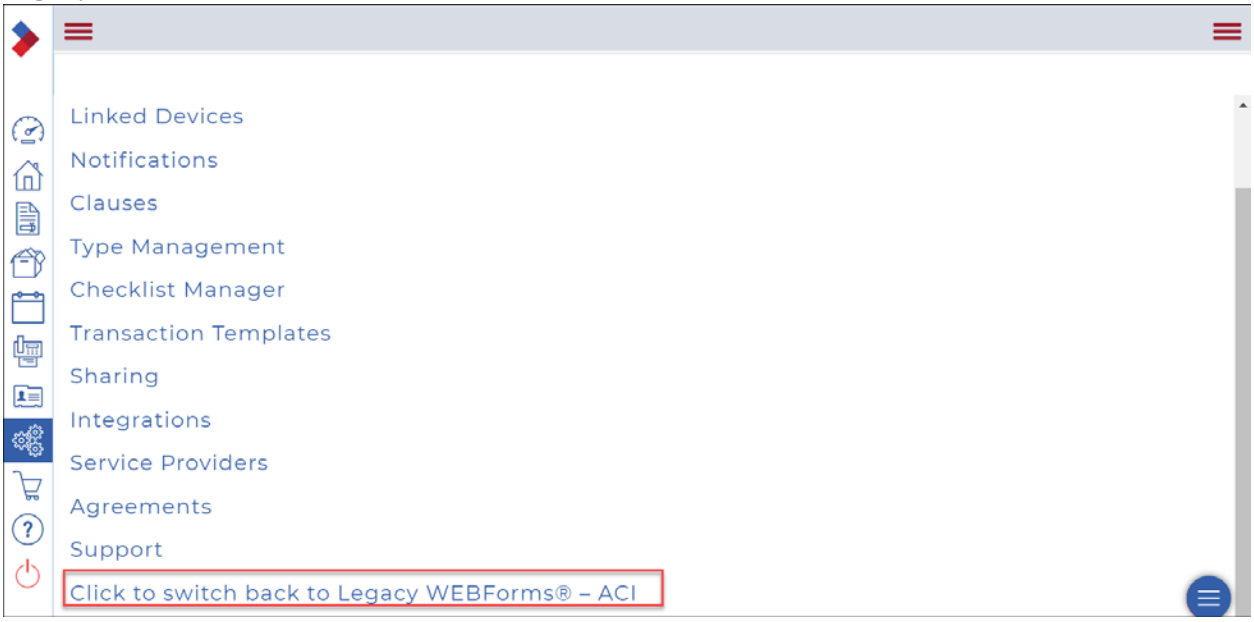
- Online Searchable Help
- Video Tutorials
- Recorded Webinars
- Live Webinars



In addition, our friendly Member Support team is available to help you with your questions.

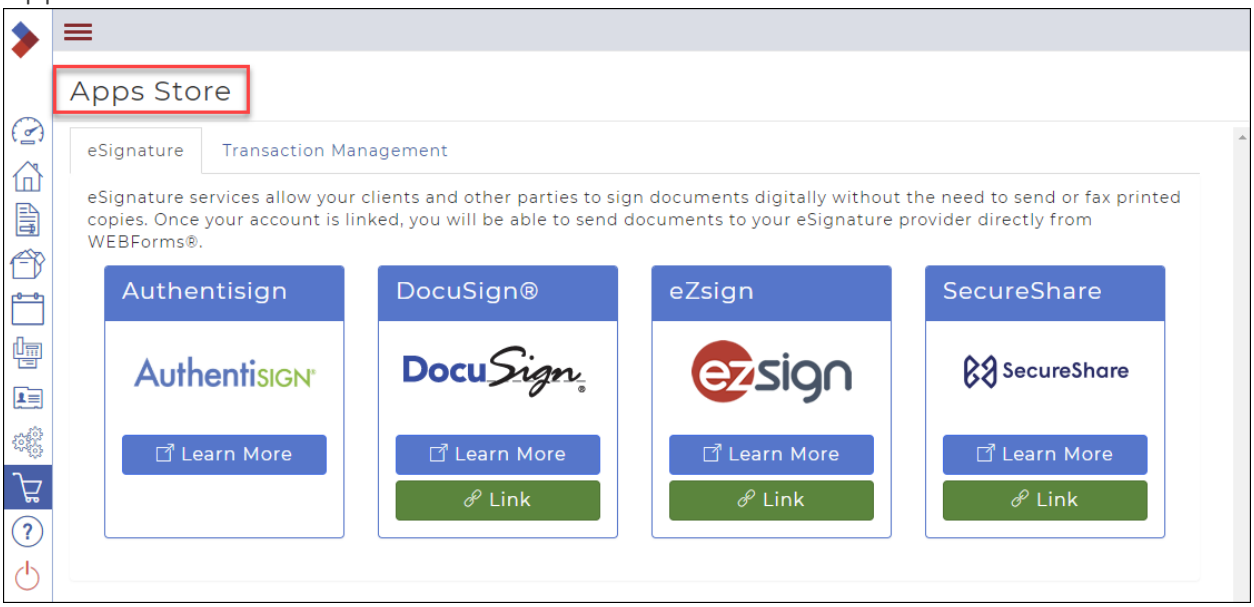

Support
Contact CREA Member Support
CREA WEBForms® Member Support is available using the following methods, Monday through Friday from 8AM to 8PM Eastern Time: please contact CREA Member Support
Email: support@crea.ca
Phone: 1.888.237.7945
Or by completing and submitting the form below.
Contact Support
Please fill out the form below to send an email to helpdesk support.
Name
Name
Email
Email
Phone
If you require a callback
Phone
Help Centre
Did you try to find a solution in the WEBForms® Help Centre?
Detailed description of the issue
Please include detailed steps taken to produce the error or problem.
Submit Help Request

Legacy



Until December 2019, you can click here to return to the Legacy interface. However, Transaction Templates and Transactions created in **CREA WEBForms® 2019** will not be accessible in the Legacy version.

Apps Store



You can purchase eSignature and Transaction Management software through the Apps Store.

Help

Access Support when you are looking for the following:

- Online Help Guide
- Tutorial Videos
- Recorded Webinars

- Live Webinars
- Member Support

Forms Editor

When working within a form, the Forms Editor displays at the top of the form. It provides several options, and several of the options have a dropdown menu.

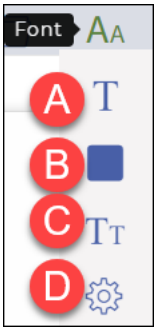
File

Under File, you can select:

A. Add
B. Save (Save / Save as PDF)
C. Copy
D. Erase (All Pages / Current Page)
E. Watermark (Confidential / Draft / Remove)
F. Remove
G. Print
H. Send (Email / Fax / Documents / Markup in Documents)
I. Exit

Font

Under Font, you can select:

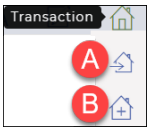


A. Style
B. Color
C. Size
D. Text Functions

Clause

Transaction

Under Transaction, you can select:



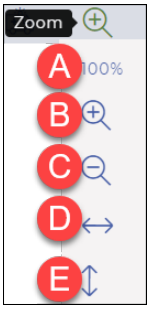
A. Add to
B. Start new

Pages

Help

Zoom

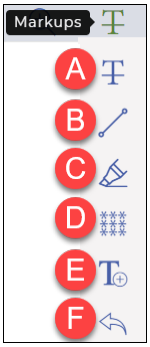
Under **Zoom**, you can select:



A. Reset Zoom
B. Zoom in
C. Zoom out
D. Fit width
E. Fit height

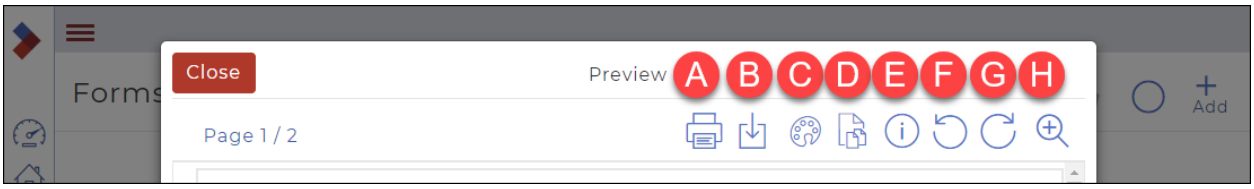
Markups

Under **Markup**s, you can select:



A. Strike-through
B. Line
C. Highlight
D. Redact
E. Annotate
F. Clear All

Forms Preview Window Toolbar



A. **Print**

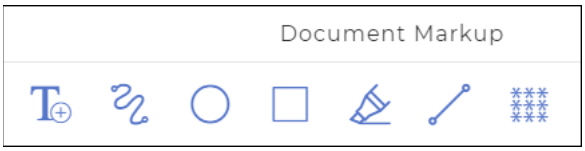
- Allows you to print the form

B. **Download**

- Allows you to download the form as a pdf

C. **Document Markup**

- Allows you to use Text, Freedraw, Ellipse, Rectangle, Highlight, Line and Redact.

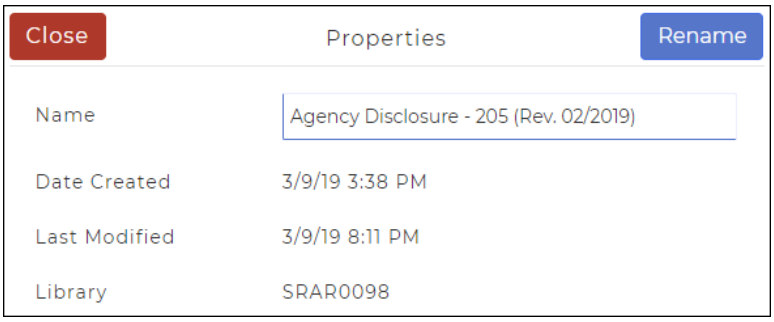


D. **Document Slicer Tool**

- Allows you to separate the form into separate pages.

E. **Properties/Rename**

- Opens a dialog box that displays the Name, Date Created, Last Modified, and Library number, as well as an option to rename the form by editing the name and then clicking Rename



F. **Rotate**

- Allows you to rotate the form left or right

G. **Zoom in/Zoom out**

- Allows you to zoom in or zoom out while viewing the form.

Section C: Working with WEBForms®

This section deals with the most common tasks in WEBForms®:

Working with Forms

Working with Transactions (Transaction Kits)

Working with Transaction Templates (Template Kits)

Working with Documents

Working with Clauses

Working with Contacts

Working with Checklists and Tasks

Working in Teams

Working with Forms

As a REALTOR®, forms are a big part of the job. WEBForms® allows you to streamline your workflow, to make your job easier and your forms more accurate.

Caution: Once a form is signed and returned to you, it goes to the Documents folder.

Caution: We highly recommend always creating a transaction when working with Forms. Because you can group multiple forms together in one file, you can take advantage of the auto population feature from the details section to the forms. You can also upload relevant docs into your transactions. You can also name the transaction whatever you like.

The Individual forms folder is only recommended for printing blank versions of forms.

Note: Your Forms Library can be branded with a logo. You won't see the logo while working on it in the online editable form, but you will see it when it is sent as an outbound fillable PDF (You can do a print preview to view it before sending).
Contact forms@instanetsolutions.com.

This section includes

Understanding forms and fields
Creating a form and adding it to a new transaction
Creating a form and adding it to an existing transaction
Creating a standalone form
Attaching a form to a transaction
Editing a form in a transaction
Editing a standalone form
Renaming a form
Deleting a form from a transaction
Deleting multiple forms from a transaction
Deleting multiple standalone forms
Filling and editing fields in a form manually
Copying an individual form
Copying a transaction form
Copying a form to documents
Emailing a form from the forms folder
Emailing multiple forms from the forms folder
Emailing a form from a transaction
Emailing multiple forms from a transaction
Faxing a form from the forms folder
Faxing multiple forms from the forms folder
Faxing a form from a transaction
Printing a form from the forms folder
Printing multiple forms from the forms folder
Printing a form from a transaction

[Printing multiple forms from a transaction]
[Downloading a form]
[Inserting a clause into a form]

Understanding forms and fields

Forms represent legal contracts that are filled out interactively online. They are usually provided by your board, association, or broker, and are reviewed to ensure compliance and protect all involved parties legally.

Use Forms to store, organize, manage, access, and work with your forms.

Forms provides a form library for your MLS® System board and brokerage forms.

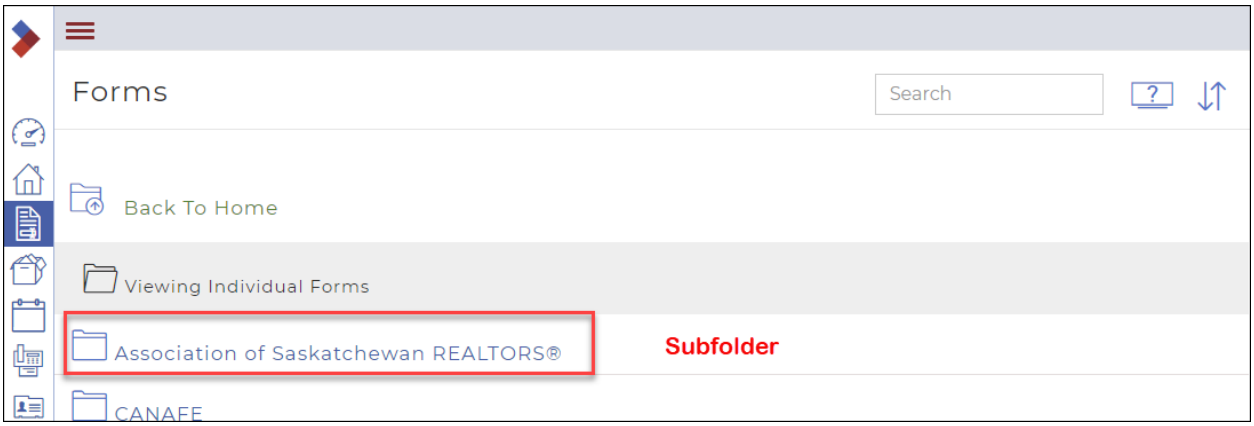
When you attach a form to a transaction, the system can automatically fill in many of the form fields for you, saving you time and preventing errors in form filling.

Forms folders level 1

The **Individual Forms** folder contains both standalone forms and form templates.

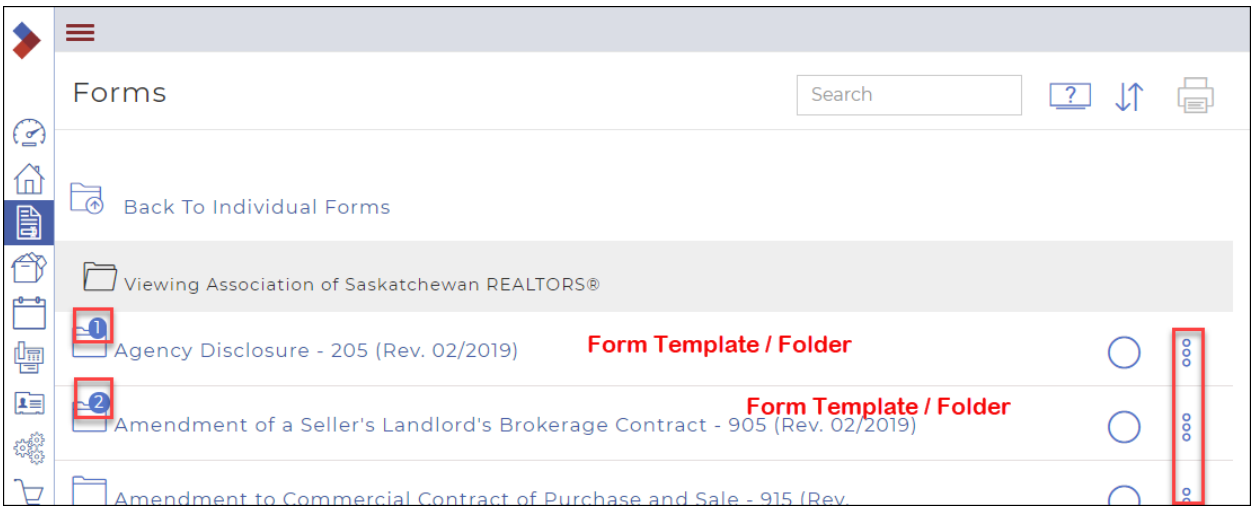
The **Transaction Forms** folder contains forms that have been added to specific transactions.

Forms folders level 2



Within the **Individual Forms** folder are subfolders containing form templates and standalone forms.

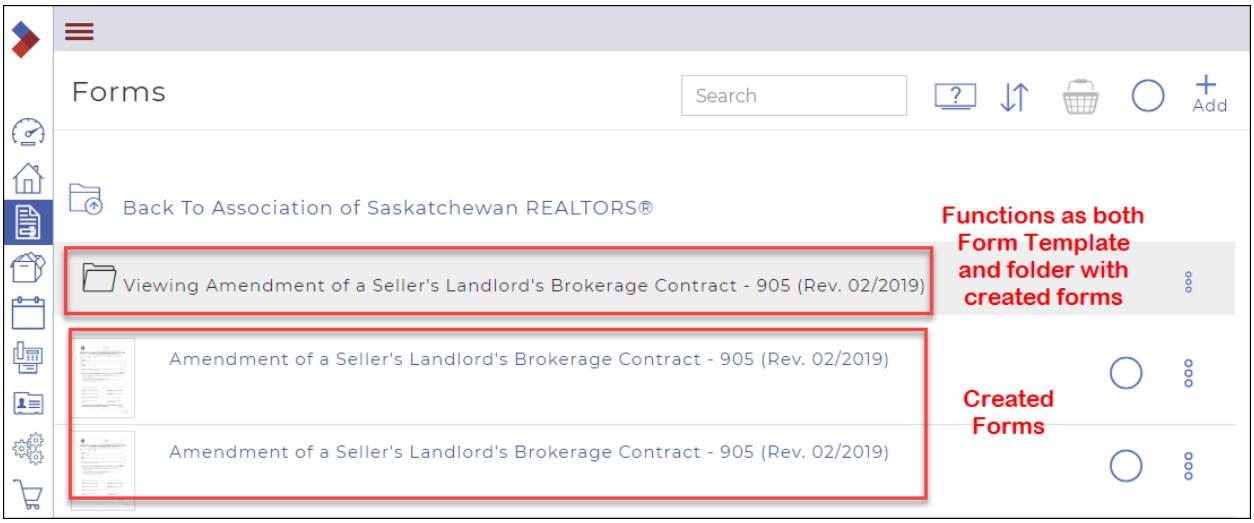
Forms folders level 3



There is a subfolder for each specific form template, that indicates how many standalone forms have been created based on that template.

Click the **Ellipses Menu** ⋮ to create a new form from that form template.

Forms folder level 4



When you click a specific form template, you will see that template as both

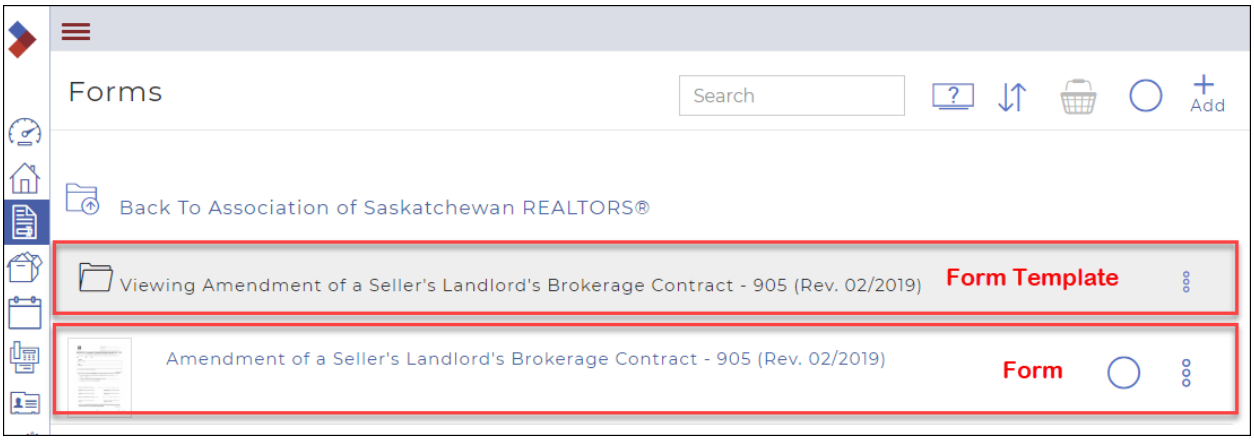
A. the Form Template itself
B. the folder that contains the standalone forms you have created from the Form Template

Creating a form and adding it to a new transaction

Create a form when you need an interactive, digital, legal document provided by your board to conduct your business.

You can create forms out of the existing form templates downloaded from your board and add them to transactions. For example, you can create an agreement of purchase and sale form out of your agreement of purchase and sale form template and add it to your transaction.

Note: You can only create a "New" form from the template forms in the Individual Forms folder, not the Transaction Forms folder.
Note: In the Individual Forms folder, be sure to click a Form Template, not an actual form, to display the New form dialog.

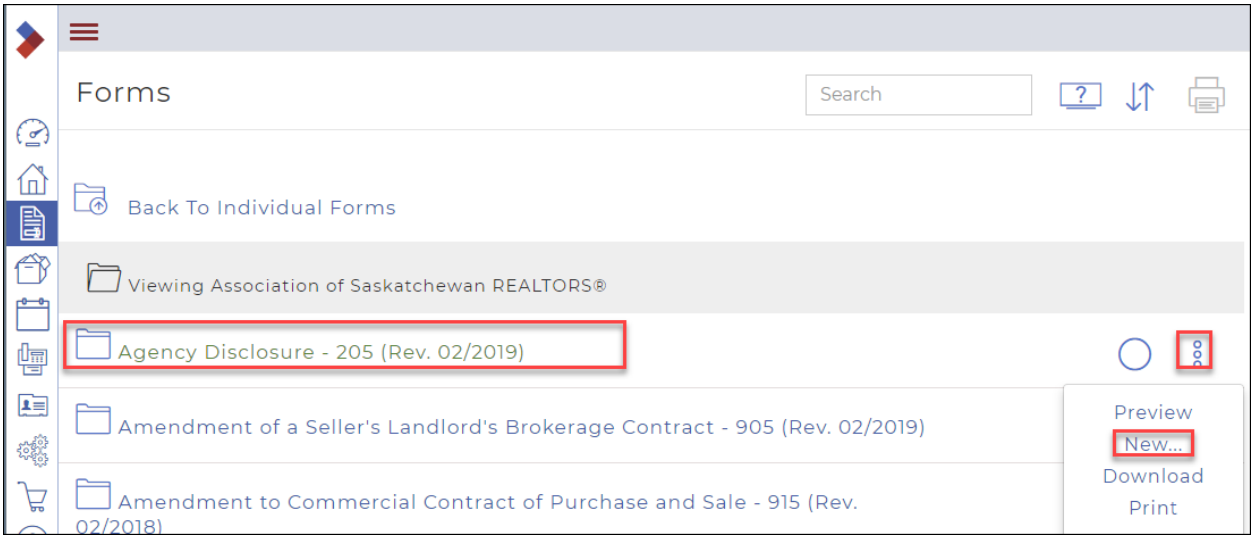


CLICK TO VIEW VIDEO

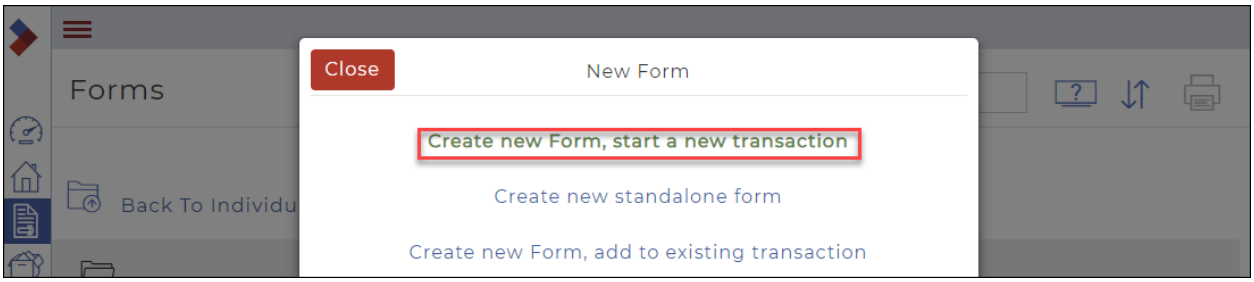
To create a form and add it to a new transaction:

1. Click **Forms** and locate the form template you need in the **Individual Forms** folder.

2. Click the **Ellipses Menu** ⋮ beside the form you want to use.
   A dialog box displays the possible actions.

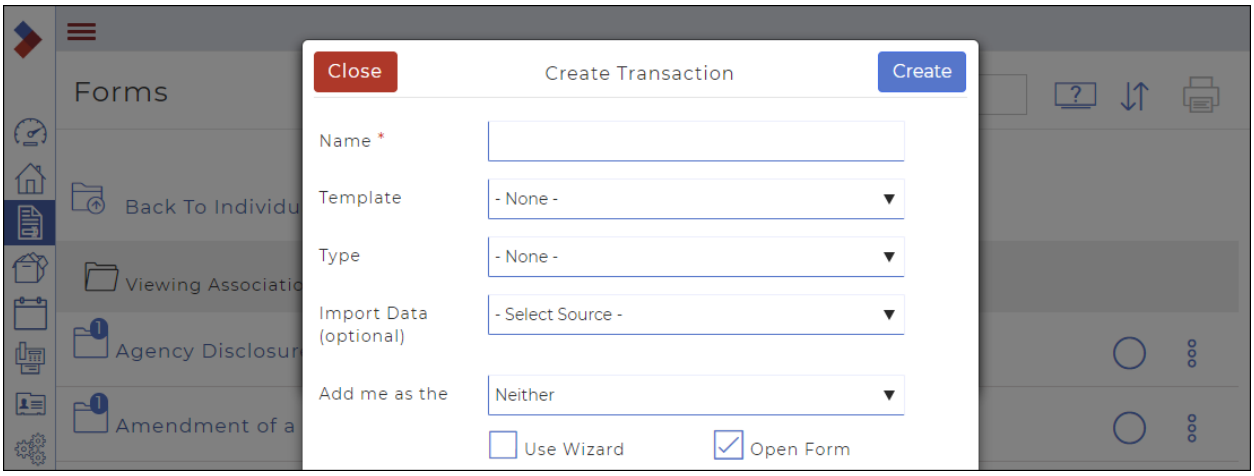


3. Click **New**.
   The **New Form** dialog box displays.



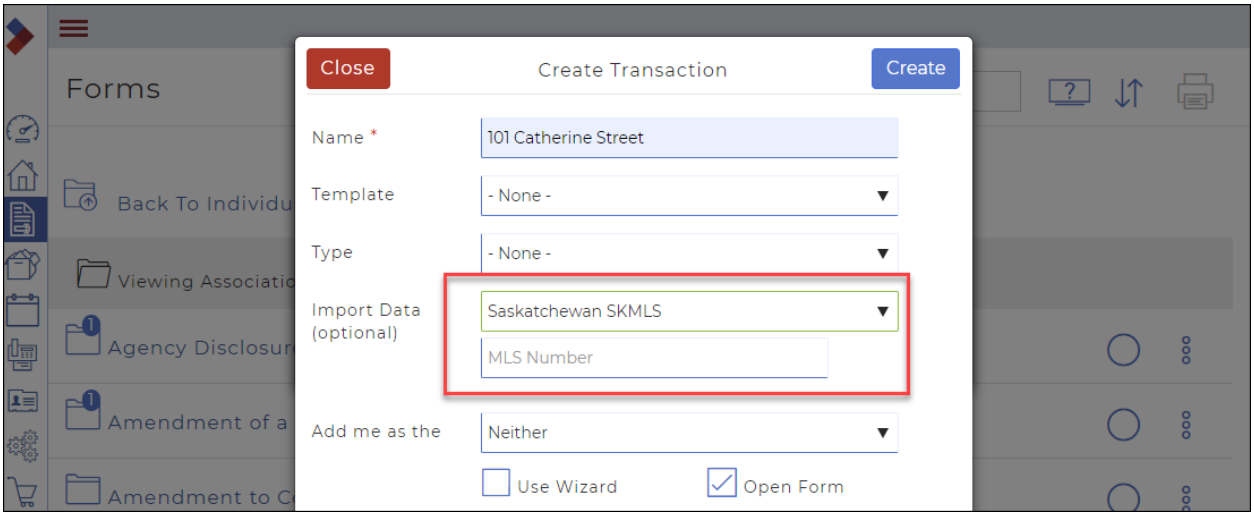
4. **Click Create new Form, start a new transaction**.

   The **Create Transaction** dialog box opens.



5. Follow the instructions under *Creating a Transaction* to complete the steps.
6. In the **Name** field, enter a name for the transaction. Typically, this is the street address of the property.
   - Optional: Use the **Template** dropdown to select the appropriate template to automatically add a checklist, forms, and documents. If you have not yet created any templates, the option is not available. Consider creating a template first.

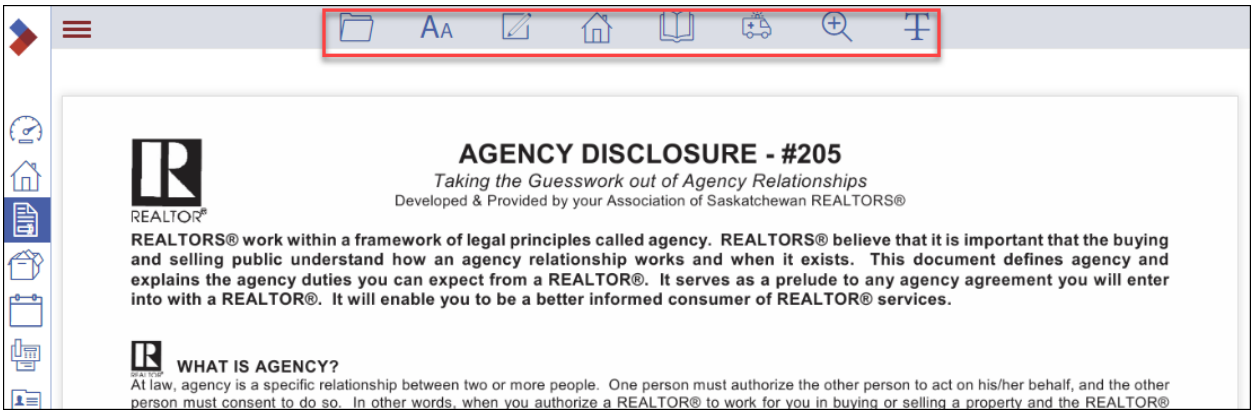
- Optional: Use the **Type** dropdown to select the type of Transaction.
- Optional: Use the **Import Data** dropdown to select the MLS® System listing as a source of information for the transaction. First click the Select Source dropdown to select a source. Additional fields display.



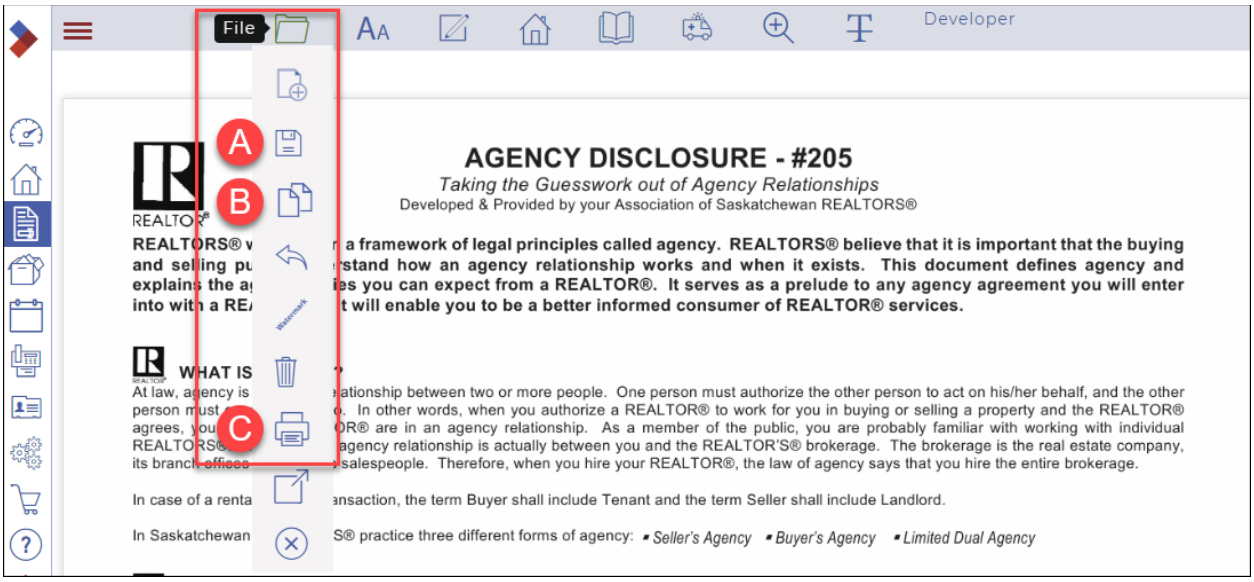
7. In the MLS Number field, specify the MLS® System number of the listing.
   - Optional: Use the Add me as the dropdown to select your role in the transaction. Choose from Listing Agent, Selling Agent, Neither, or Both.

   Caution: You and other contacts may already be automatically added. Check your Contacts.

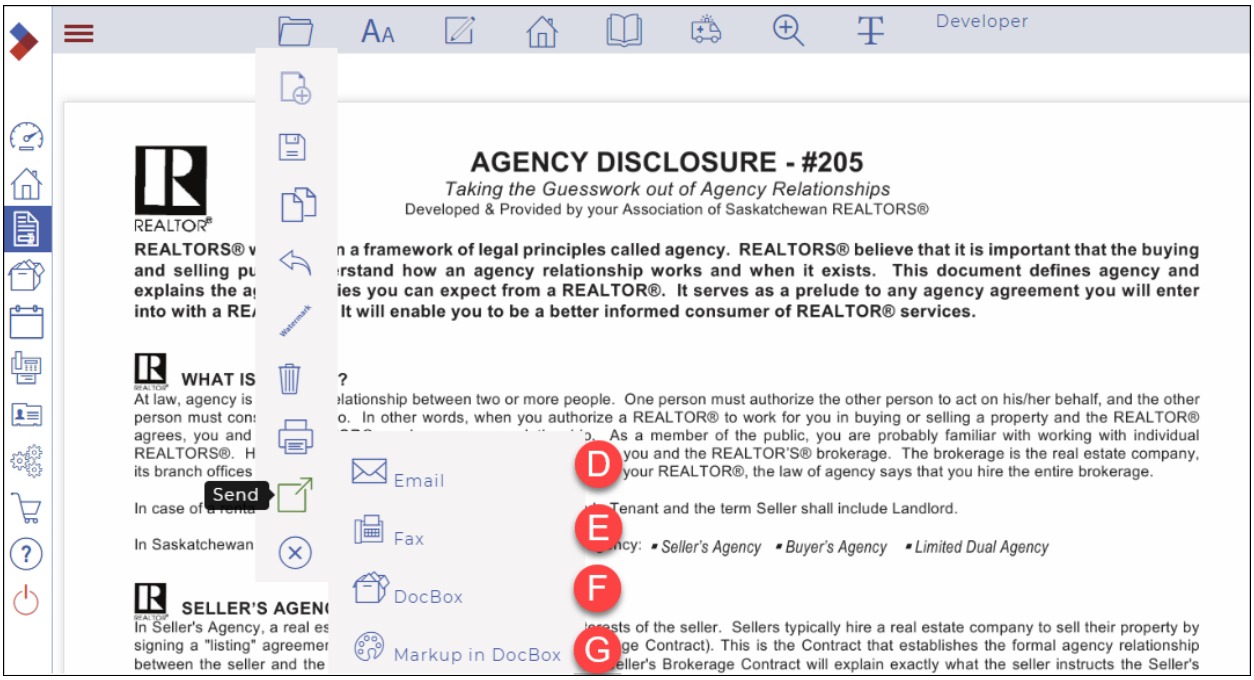
8. Click **Create**.
9. The selected form opens in the form editor.



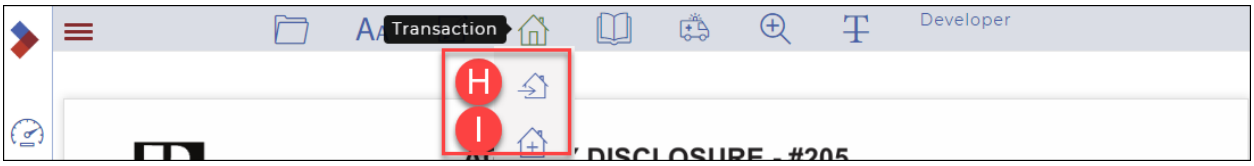
10. Use the available form editor options to pre-populate your form's fields with information. See "*Editing a Form*" for more information on each form editor option.
11. When you are finished setting up your form, in the form editor options, do one of the following:



A. Click **File > Save** if you need to save the form to the list of forms.
B. Click **File > Copy** if you need to copy the form.
C. Click **File > Print** if you need to print the form.



D. Click **File > Send > Email** if you need to send the form as part of an email. See "*Emailing a Form*" for more information.
E. Click **File > Send > Fax** if you need to send the form as part of a fax. See "*Faxing a Form*" for more information.
F. Click **File > Send > Document** if you need to save the form to a Document folder.
G. Click **File > Send > Markup in Documents** if you need to mark up the form. See "*Marking Up a Document*" for more information.



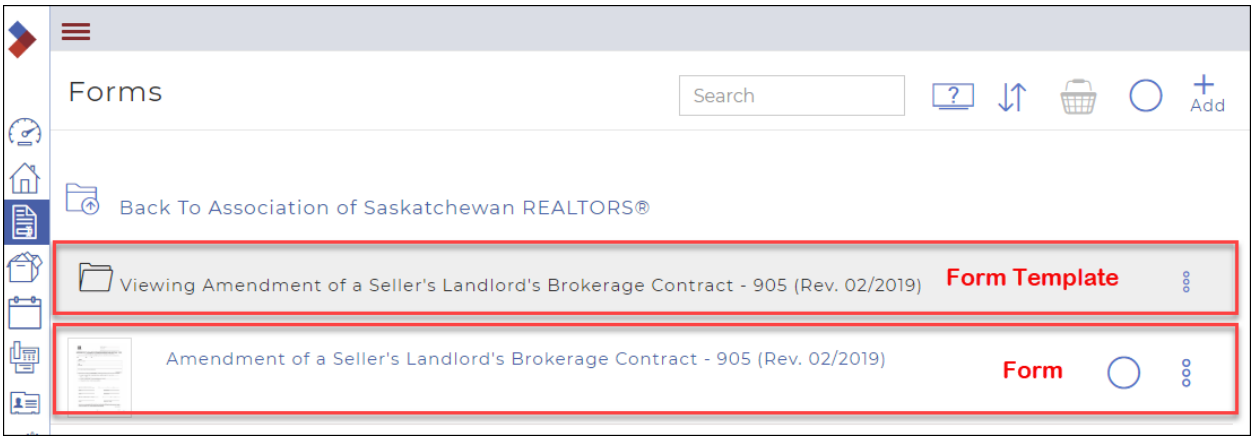
H. Click **Transaction > Add to** to add the form to an existing transaction.
I. Click **Transaction > Start New** to add the form to a new transaction.

Creating a form and adding it to an existing transaction

Create a form when you need an interactive, digital, legal document provided by your board to conduct your business.

You can create forms out of the existing form templates downloaded from your board and add them to transactions. For example, you can create an agreement of purchase and sale form out of your agreement of purchase and sale form template and add it to your transaction.

Note: You can only create a "New" form from the template forms in the Individual Forms folder, not the Transaction Forms folder.
Note: In the Individual Forms folder, be sure to click a Form Template, not an actual form, to display the New form dialog.

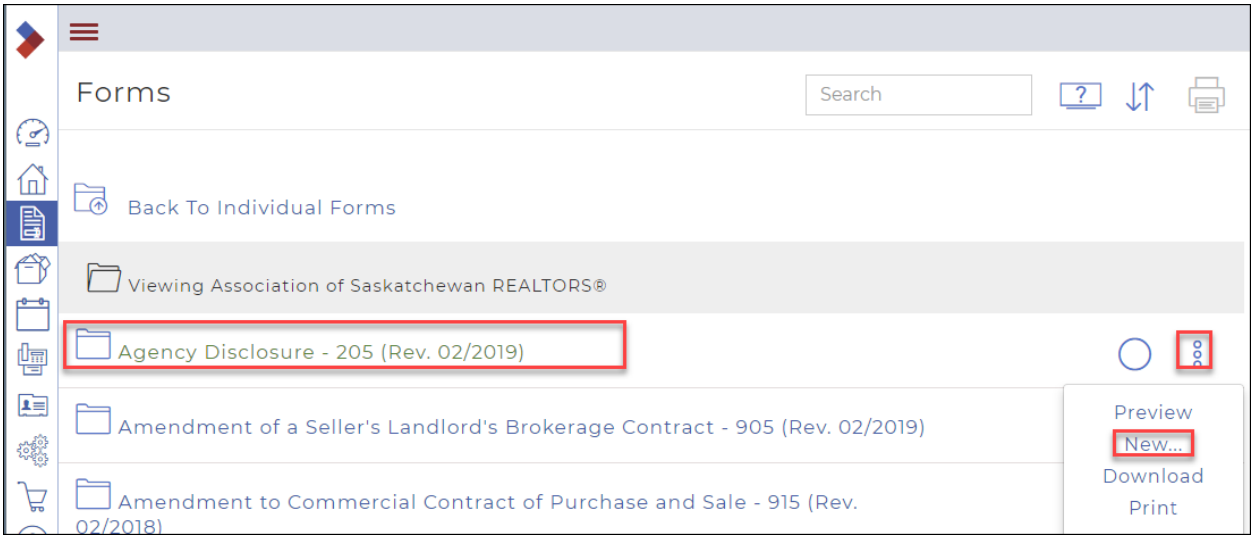


CLICK TO VIEW VIDEO

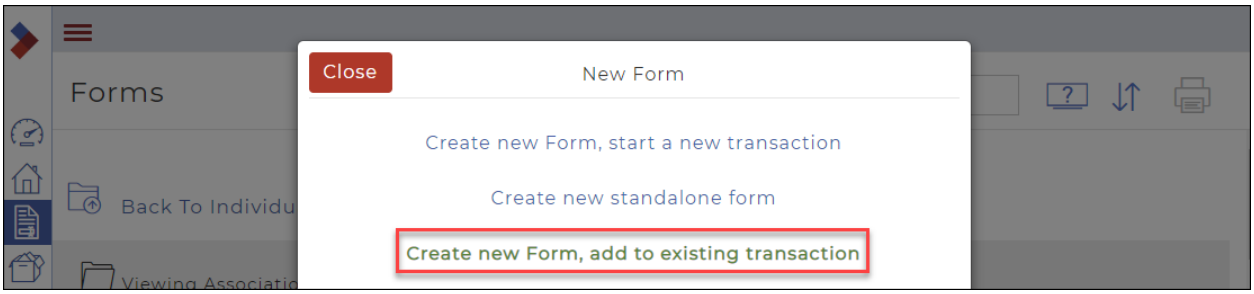
To create a form and add it to an existing transaction:

1. Click **Forms** and locate the form template you need in the **Individual Forms** folder.

2. Click the **Ellipses Menu** beside the form you want to use.
   A dialog box displays the possible actions.

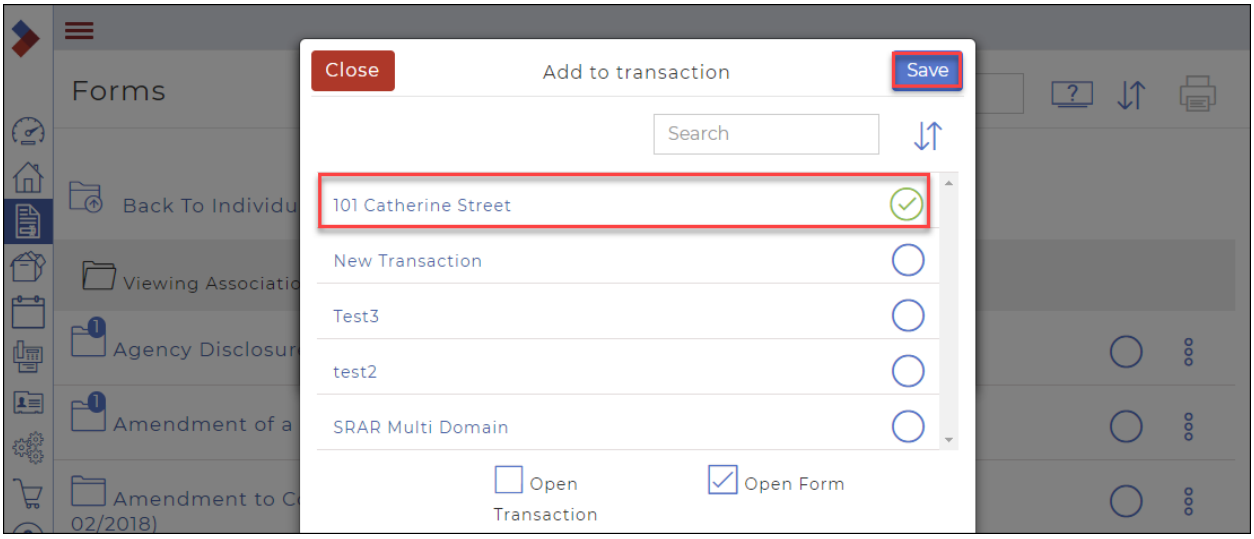


3. Click **New**.
   The **New Form** dialog box displays.

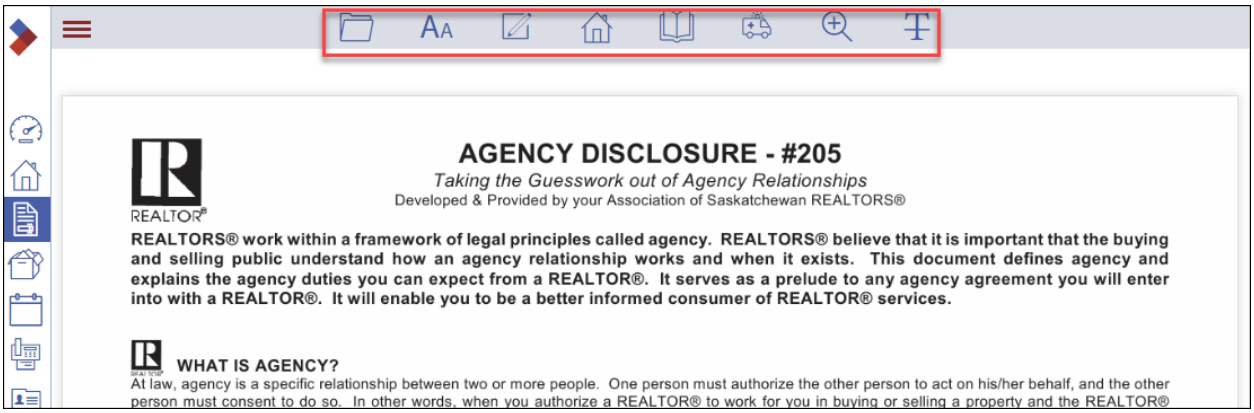


4. Click **Create new Form, add to existing new transaction**.

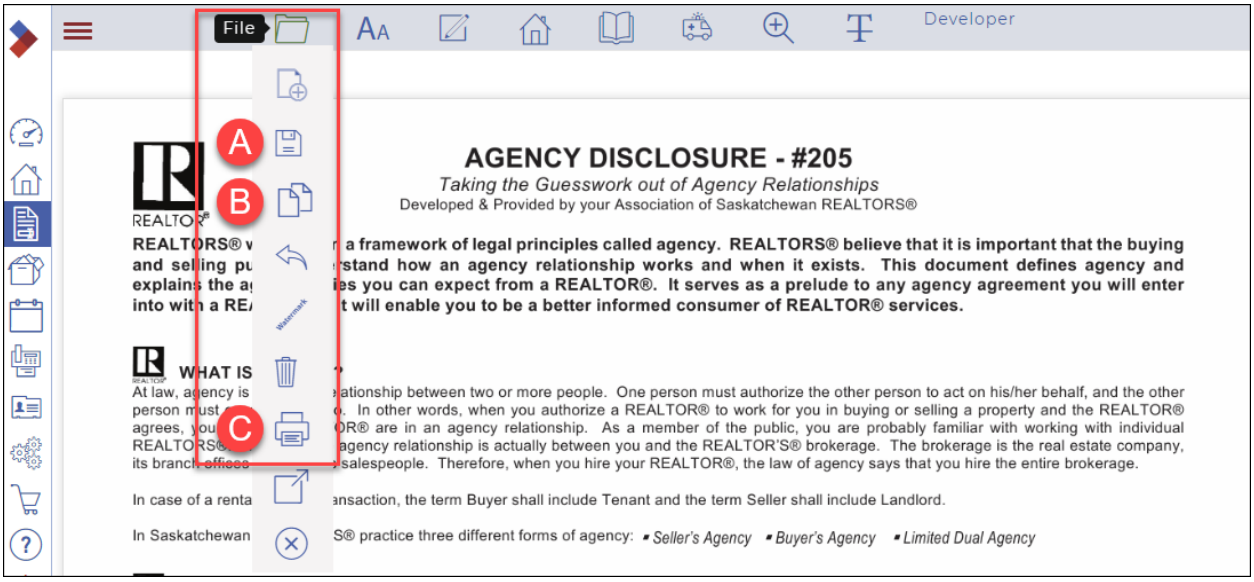
   The **Add to Transaction** dialog box opens.



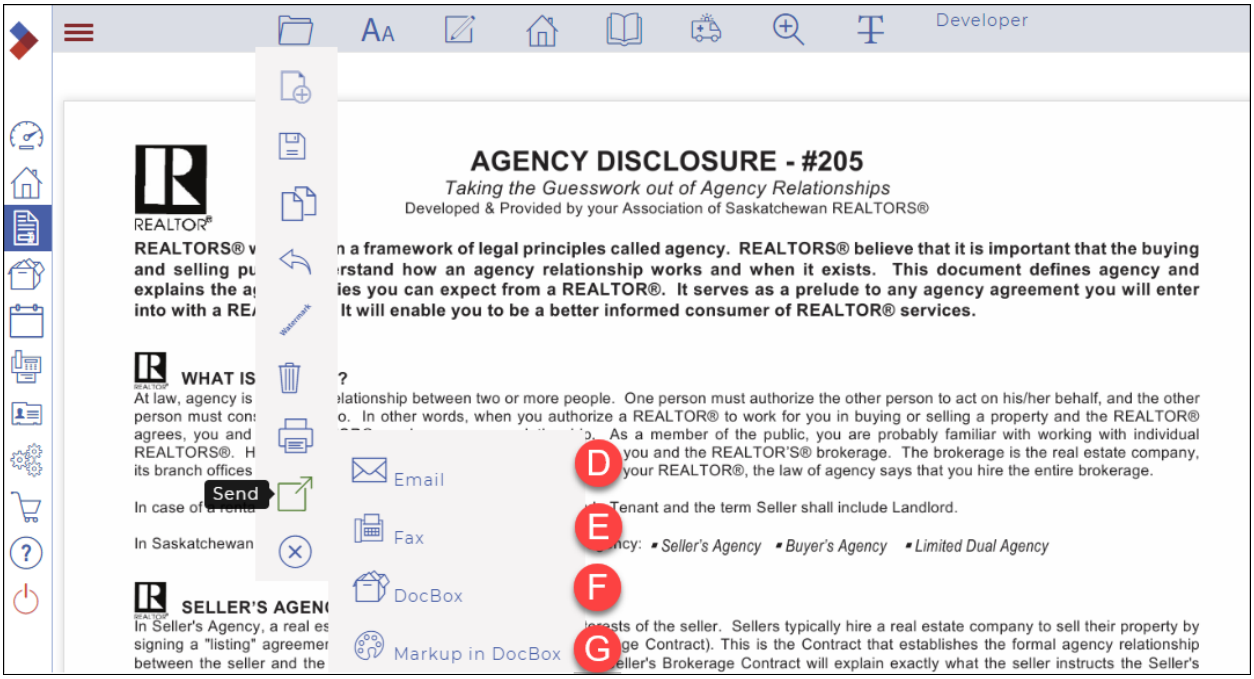
5. Check the transaction you need to add the form to and click **Save**.
   The selected form opens in the form editor.



6. Use the available form editor options to pre-populate your form's fields with information. See "*Editing a Form*" for more information on each form editor option.
7. When you are finished setting up your form, in the form editor options, do one of the following:



A. Click **File > Save** if you need to save the form to the list of forms.
B. Click **File > Copy** if you need to copy the form.
C. Click **File > Print** if you need to print the form.

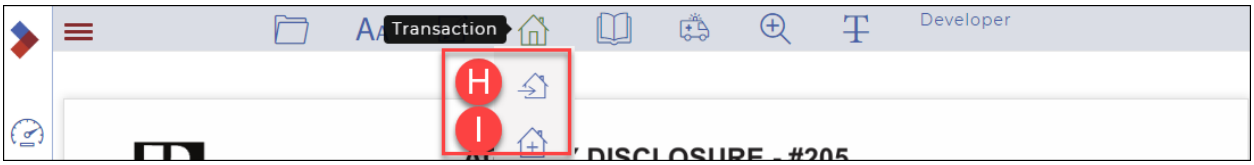


D. Click **File > Send > Email** if you need to send the form as part of an email. See "*Emailing a Form*" for more information.

E. Click **File > Send > Fax** if you need to send the form as part of a fax. See "*Faxing a Form*" for more information.

F. Click **File > Send > Document** if you need to save the form to a Document folder.

G. Click **File > Send > Markup in Documents** if you need to mark up the form. See "*Marking Up a Document*" for more information.



H. Click **Transaction > Add to** to add the form to an existing transaction.

I. Click **Transaction > Start New** to add the form to a new transaction.

Creating an individual (standalone) form

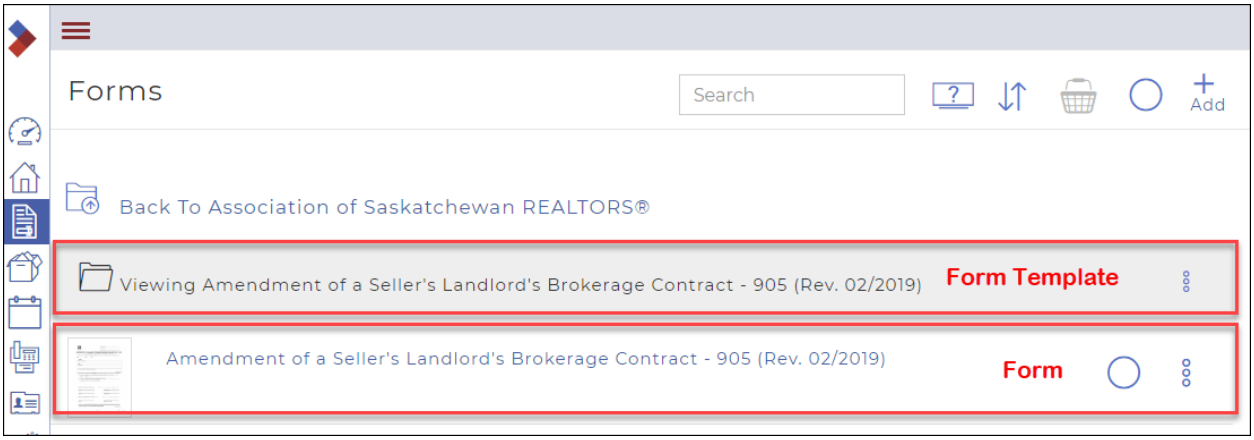
Caution: We highly recommend always creating a transaction when working with Forms. Because you can group multiple forms together in one file, you can take advantage of the auto population feature from the details section to the forms. You can also upload relevant docs into your transactions. You can also name the transaction whatever you like.

Create a form when you need an interactive, digital, legal document provided by your board to conduct your business.

You can create forms out of the existing form templates downloaded from your board and add them to transactions. For example, you can create an agreement of purchase and sale form out of your agreement of purchase and sale form template and add it to your transaction.

You can also create individual (standalone) forms out of a form template if you have a form that is not immediately associated with a deal, such as a buyer representation agreement form. You can then associate the created buyer representation agreement form with a transaction later, if the situation arises.

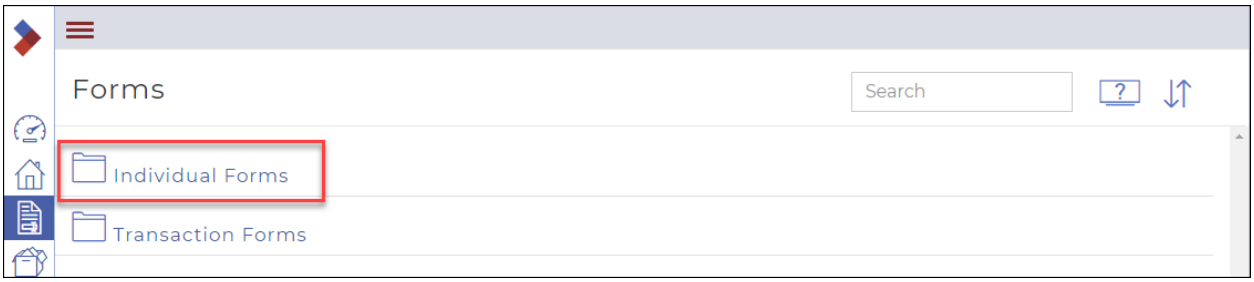
Note: You can only create a "New" form from the template forms in the Individual Forms folder, not the Transaction Forms folder.
*Note: In the Individual Forms folder, be sure to click a Form Template, not an actual form, to display the **New** form dialog.*



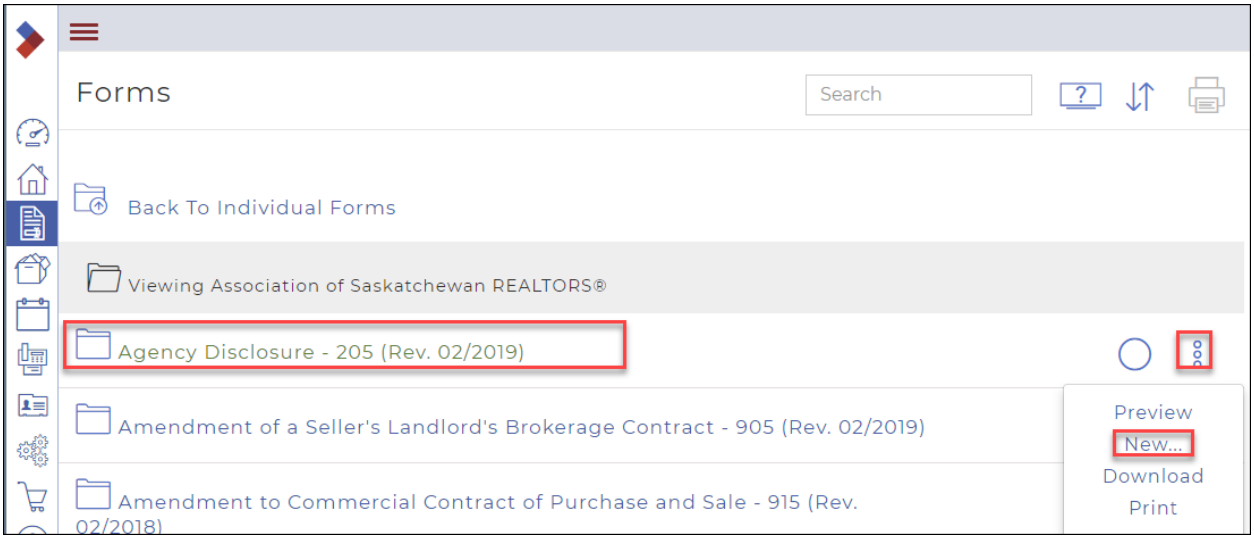
CLICK TO VIEW VIDEO

To create a standalone form**:**

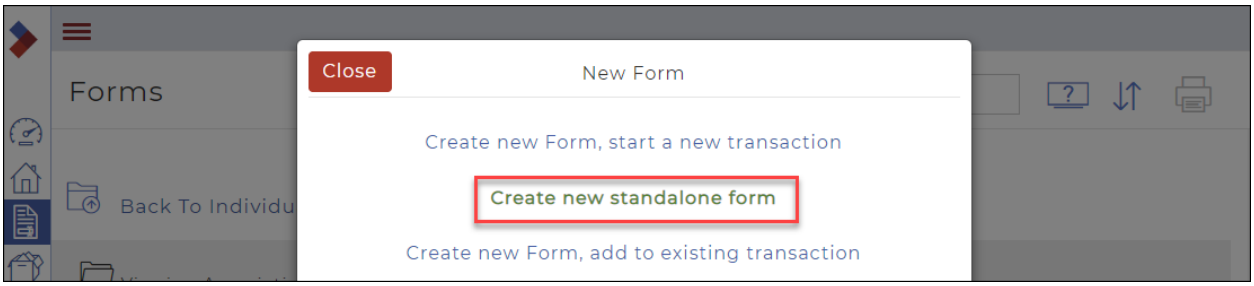
1. Click **Forms** and locate the form template you need in the **Individual Forms** folder.



2. Click the **Ellipses Menu** beside the form template you want to use.
   A dialog box displays the possible actions.

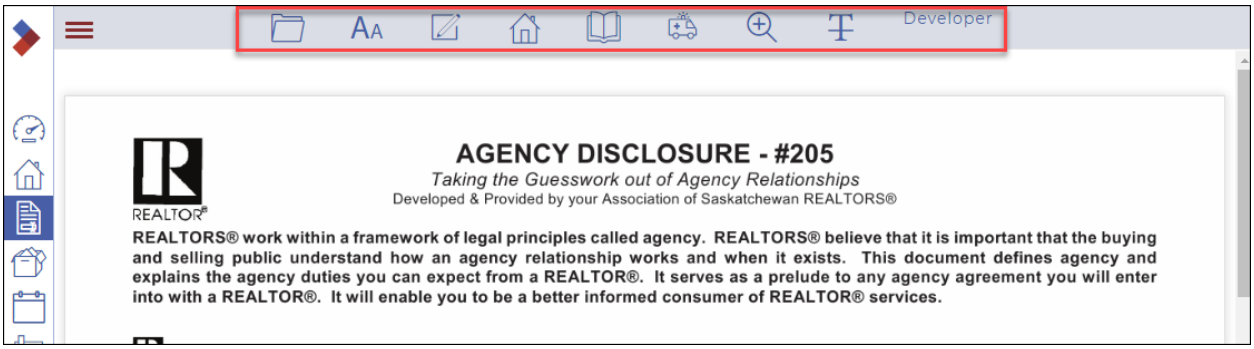


3. Click **New**.
   The **New Form** dialog box displays.

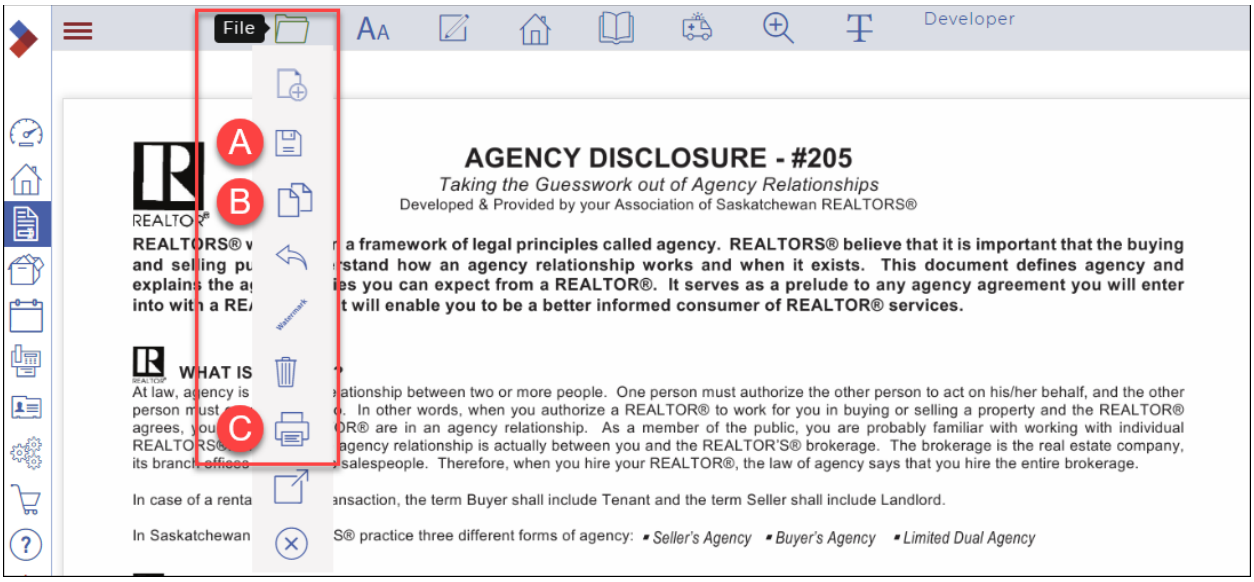


4. Click **Create new standalone form**.

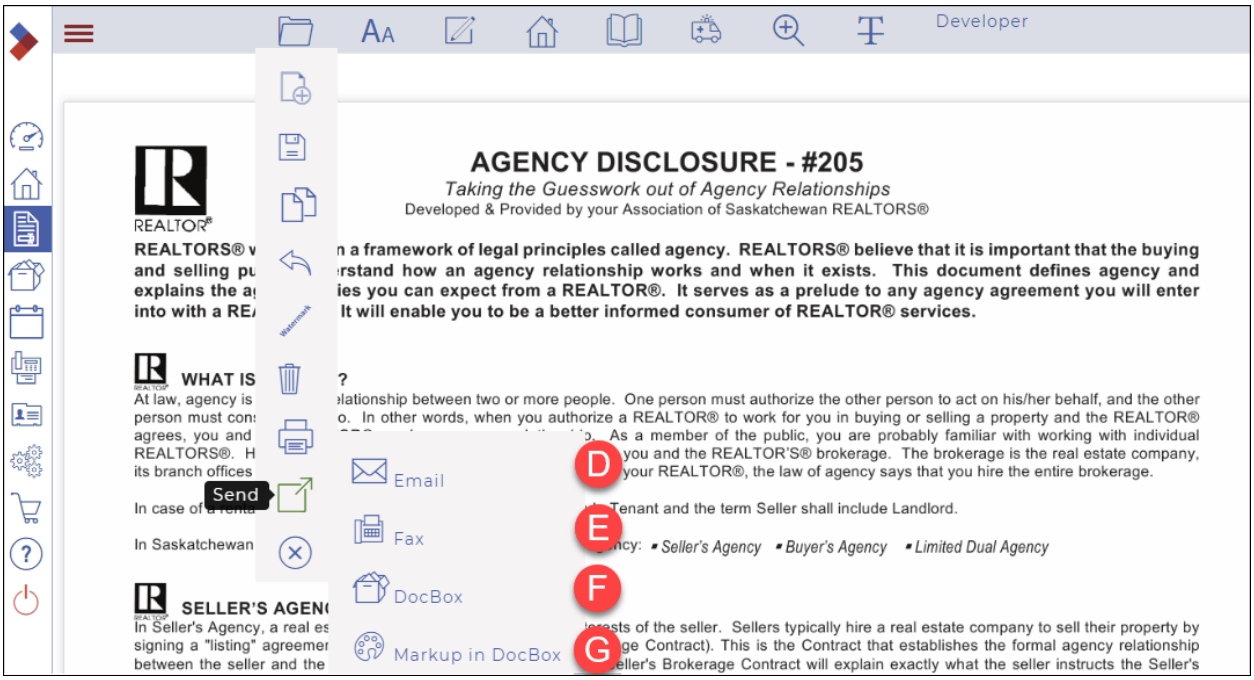
   The selected form opens in the form editor.



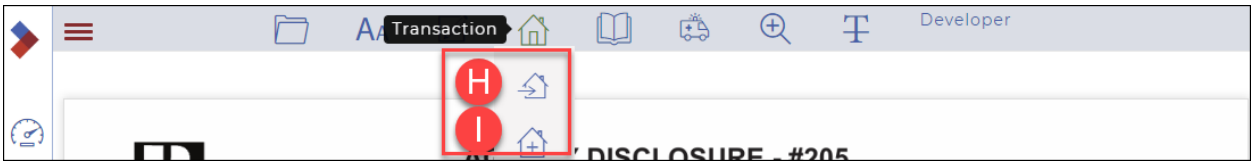
5. Use the available form editor options to pre-populate your form's fields with information. See "*Editing a Form*" for more information on each form editor option.
6. When you are finished setting up your form, in the form editor options, do one of the following:



A. Click **File > Save** if you need to save the form to the list of forms.
B. Click **File > Copy** if you need to copy the form.
C. Click **File > Print** if you need to print the form.



D. Click **File > Send > Email** if you need to send the form as part of an email. See "*Emailing a Form*" for more information.
E. Click **File > Send > Fax** if you need to send the form as part of a fax. See "*Faxing a Form*" for more information.
F. Click **File > Send > Document** if you need to save the form to a Document folder.
G. Click **File > Send > Markup in Documents** if you need to mark up the form. See "*Marking Up a Document*" for more information.



H. Click **Transaction > Add to** to add the form to an existing transaction.
I. Click **Transaction > Start New** to add the form to a new transaction.

Attaching a form(s) to an existing transaction

See *Attaching a form(s) to an existing transaction*

CLICK TO VIEW VIDEO

Editing a form in a transaction

Edit a form when you need to update a form's content. For example: You can add the brokerage name to all your form templates so that you do not have to add it later, when you create a form from the template and add it to a deal.

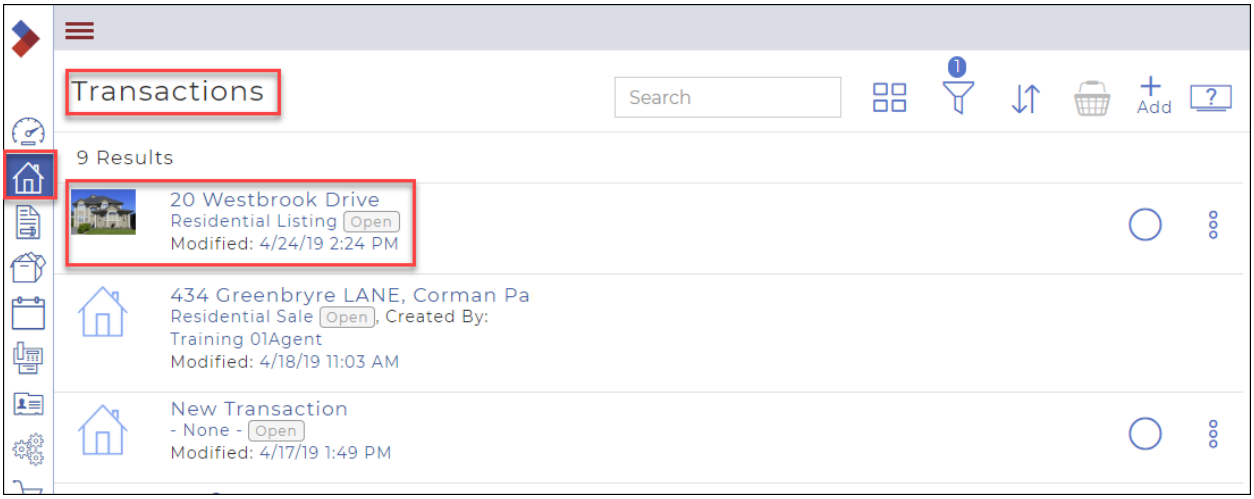
You can also use the forms editor options to:

- Edit the appearance, including the font style and size for that specific form only,
- Set the output of your forms (to a certain extent),
- Prepopulate your form fields with text,
- Add watermarks if your form is confidential or in draft form,
- Save the form with a new name or make a prepopulated copy of form for your own use,
- Specify the form's output, such as email, fax, printing, or saving to a transaction folder, and
- Add a form to a new or existing transaction directly from the editor.

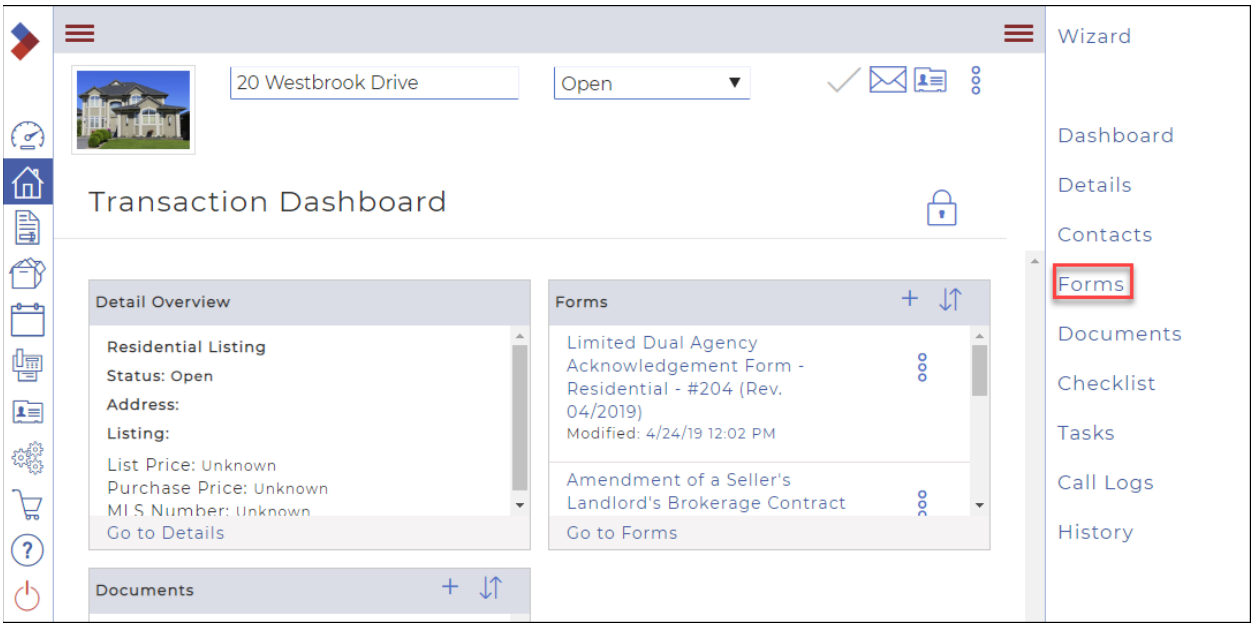
CLICK TO VIEW VIDEO

To edit a form in a transaction:

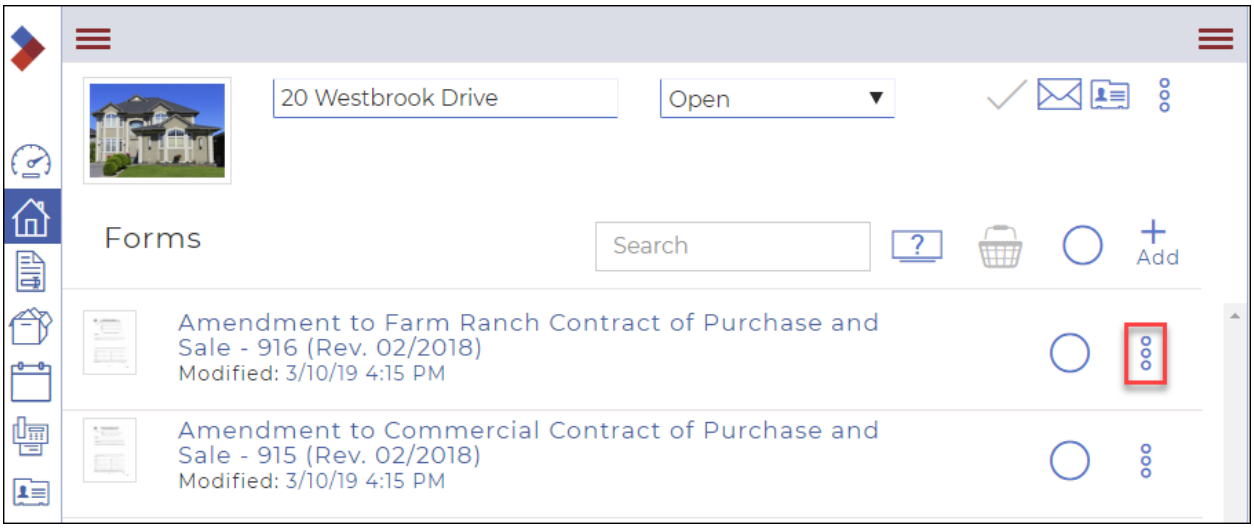
1. Click **Transactions** in the left sidebar.
   The **Transactions** list displays.



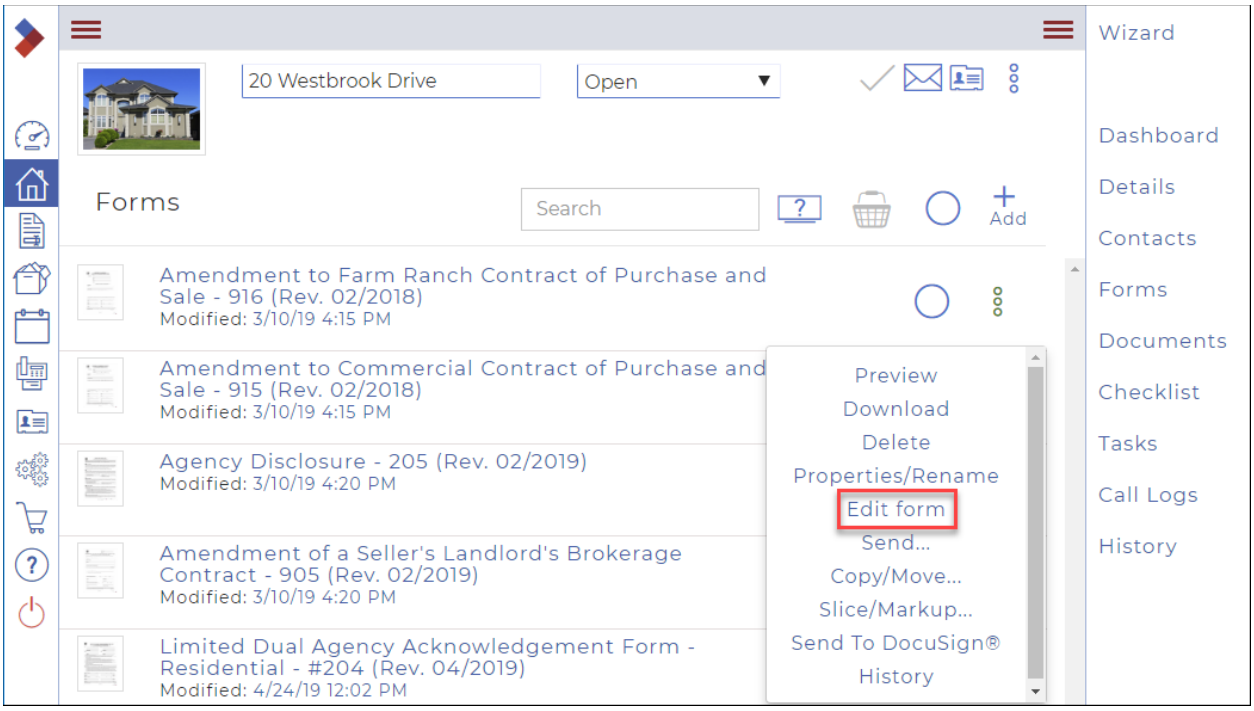
2. Click the name of the transaction with the form you wish to edit.
   The **Transaction Dashboard** displays.



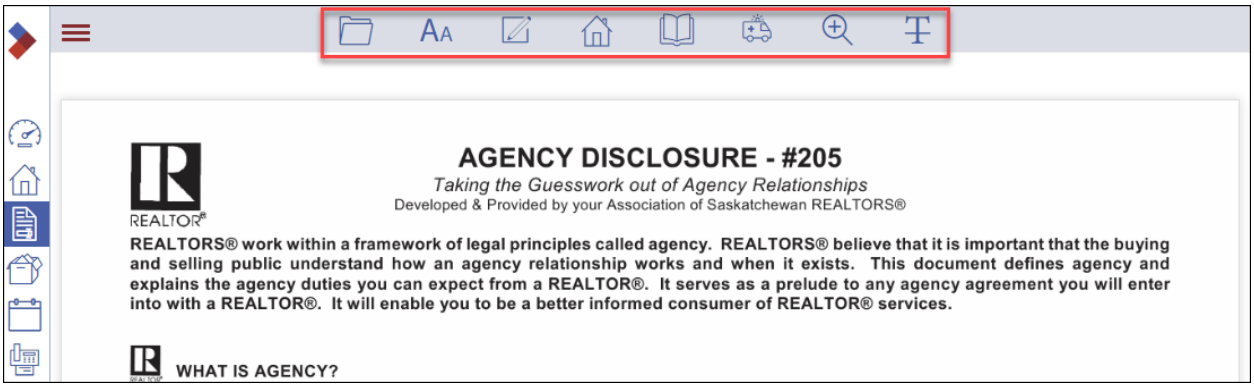
3. Click **Forms** in the right sidebar.
   The **Forms** window displays the list of forms.



4. Click the **Ellipses menu** ⋮ beside the form you wish to edit.
   The dropdown menu displays.

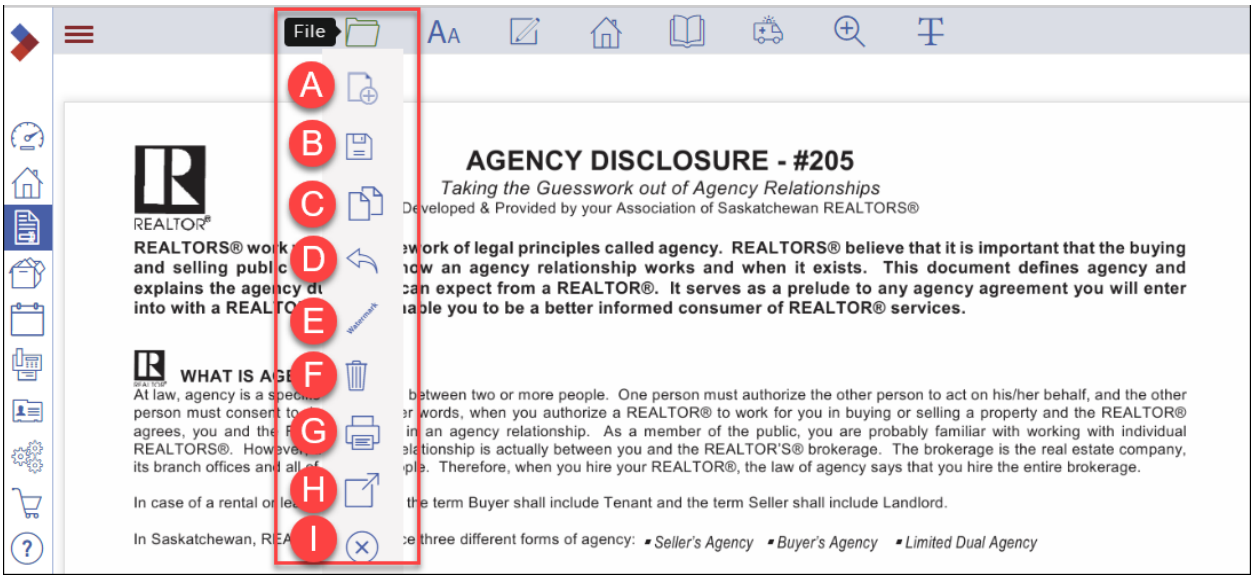


5. Click **Edit form**.
   The selected form opens in the form editor.



1. Use the available form editor options to edit the form's content. The available options are as follows:

File



A. **New Form**
- Use to create a new form using a different form from the current one.

B. **Save**

- Use **Save** Save to save the form to its current folder location

- Use **Save As PDF** Save as PDF to save the form to its current folder location as a pdf file.

C. **Copy**
- Use to create a copy of the current form in the current folder location.

D. **Erase**

- Use **All Pages** All pages to erase any changes made to all pages of the form.

- Use **Current Page** Current page to erase any changes made to the current page of the form.

E. **Watermark**

- Use **Confidential** Confidential to add a confidential watermark across all pages of the form.

- Use **Draft** Draft to add a draft watermark across all pages of the form.

- Use **Remove** Remove to remove any watermarks from all pages of the form.

F. Remove
- Use to delete the current form and return to the list of forms.

G. Print
- Use to print the current form.

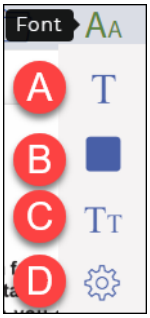
H. **Send**

- Use **Email** Email to email the form from the system. See “Email a Form” for more information.
- Use **Fax** Fax to fax the form from the system. See “Fax a Form” for more information.
- Use **DocBox** DocBox to send the form to a selected DocBox folder.
- Use **Markup in DocBox** Markup in DocBox to open the form in the document editor. See “*Mark Up a Document*” for more information.

I. **Exit**

- Use to exit the form editor and return to the list of forms.

Font



A. **Style**

- Use to select the font style, such as Times-Roman, for all editable fields for the entire form.

B. **Color**

- Use to select the font color, for all editable fields for the entire form.

C. **Size**

- Use to select the font size, for all editable fields for the entire form.

D. **Text Functions**

- Use **UPPER CASE** to set the currently selected field as all upper-case text.

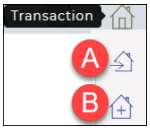
- Use **lower case** to set the currently selected field as all lower-case text.

- Use **Title** to set the first character of each sentence in the currently selected field as upper case, and all proceeding characters as lower case.

Clause

Use to select a pre-made clause to add to the selected field.

Transaction



- Use **Add to** to add the form to an existing transaction. See "*Creating a Form*" for more information.
- Use **Start new** to add the form to a new transaction. See "*Create a Form*" for more information.

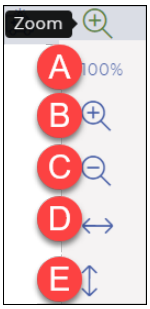
Pages

- Use to move between the form pages.

Help

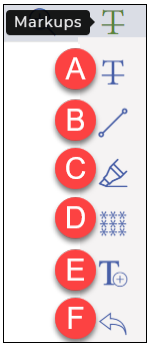
- Use **Help** to view the list of Tutorial Videos

Zoom



A. **Reset Zoom**
   - Use to reset the zoom level to the default (100%).
B. **Zoom in**
   - Use **Zoom In** to increase the magnification of the form.
C. **Zoom out**
   - Use **Zoom Out** to decrease the magnification of the form.
D. **Fit width**
   - Use **Fit Width** to fit the form editor window to the width of the web browser.
E. **Fit height**
   - Use **Fit Height** to fit the form editor window to the height of the web browser

Markups



A. **Strike-out**
   - Use to place a horizontal line on the form.

B. **Line**
- Use to place a line on the form.

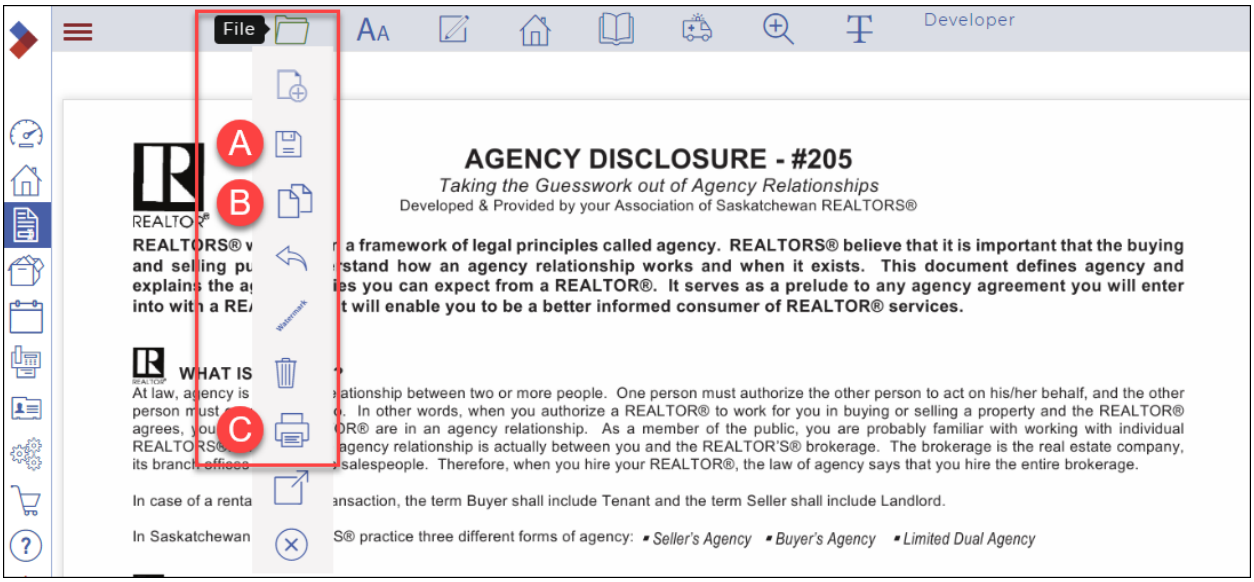
C. **Highlight**
- Use to place a colored rectangle on the form.

D. **Redact**
- Use to hide a rectangular area of the form.

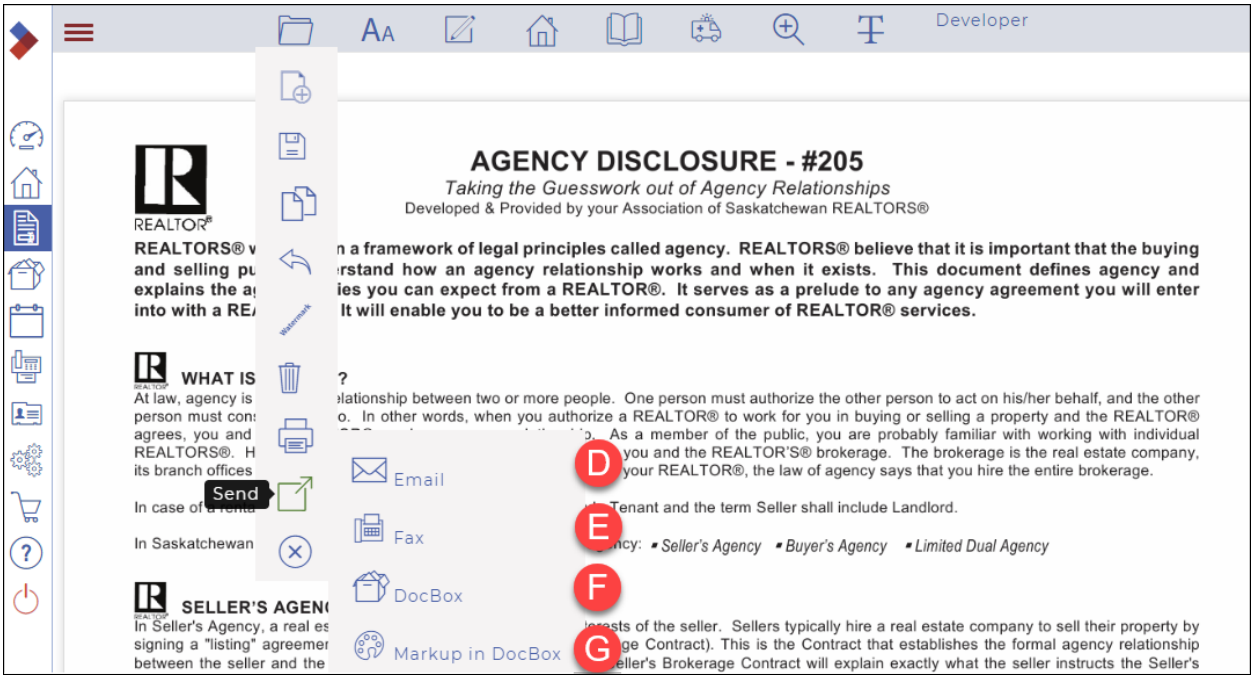
E. **Annotate**
- Use to add a text box to the form. Type any needed information in the text box.

F. **Clear All**
- Removes any markups added to the form.

2. When you are finished editing your form, in the form editor options, do one of the following:



A. Click **File > Save** if you need to save the form to the list of forms.
B. Click **File > Copy** if you need to copy the form.
C. Click **File > Print** if you need to print the form.

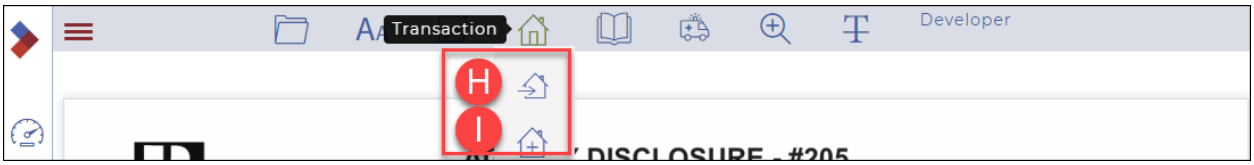


D. Click **File > Send > Email** if you need to send the form as part of an email. See "Email a Form" for more information.

E. Click **File > Send > Fax** if you need to send the form as part of a fax. See "Fax a Form" for more information.

F. Click **File > Send > DocBox** if you need to save the form to a Document folder.

G. Click **File > Send > Markup in Documents** if you need to mark up the form. See "Mark Up a Document" for more information.



H. Click **Transaction > Add to** to add the form to an existing transaction.

I. Click **Transaction > Start New** to add the form to a new transaction.

Remember to save your changes.

Editing a standalone form

Edit a form when you need to update a form's content. For example: You can add the brokerage name to all your form templates so that you do not have to add it later, when you create a form from the template and add it to a deal.

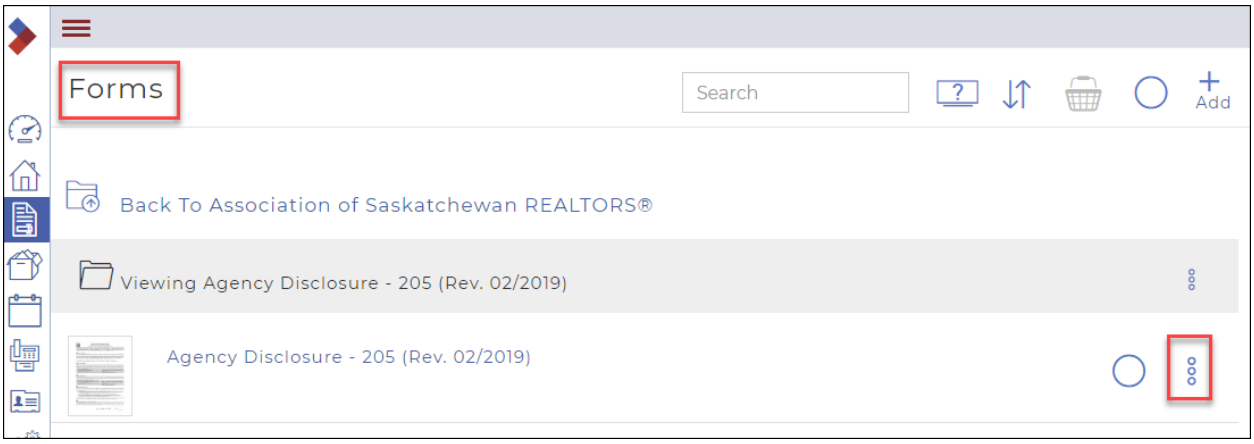
You can also use the forms editor options to:

- Edit the appearance, including the font style and size for that specific form only,
- Set the output of your forms (to a certain extent),
- Prepopulate your form fields with text,
- Add watermarks if your form is confidential or in draft form,
- Save the form with a new name or make a prepopulated copy of form for your own use,
- Specify the form's output, such as email, fax, printing, or saving to a transaction folder, and
- Add a form to a new or existing transaction directly from the editor.

CLICK TO VIEW VIDEO

To edit a form:

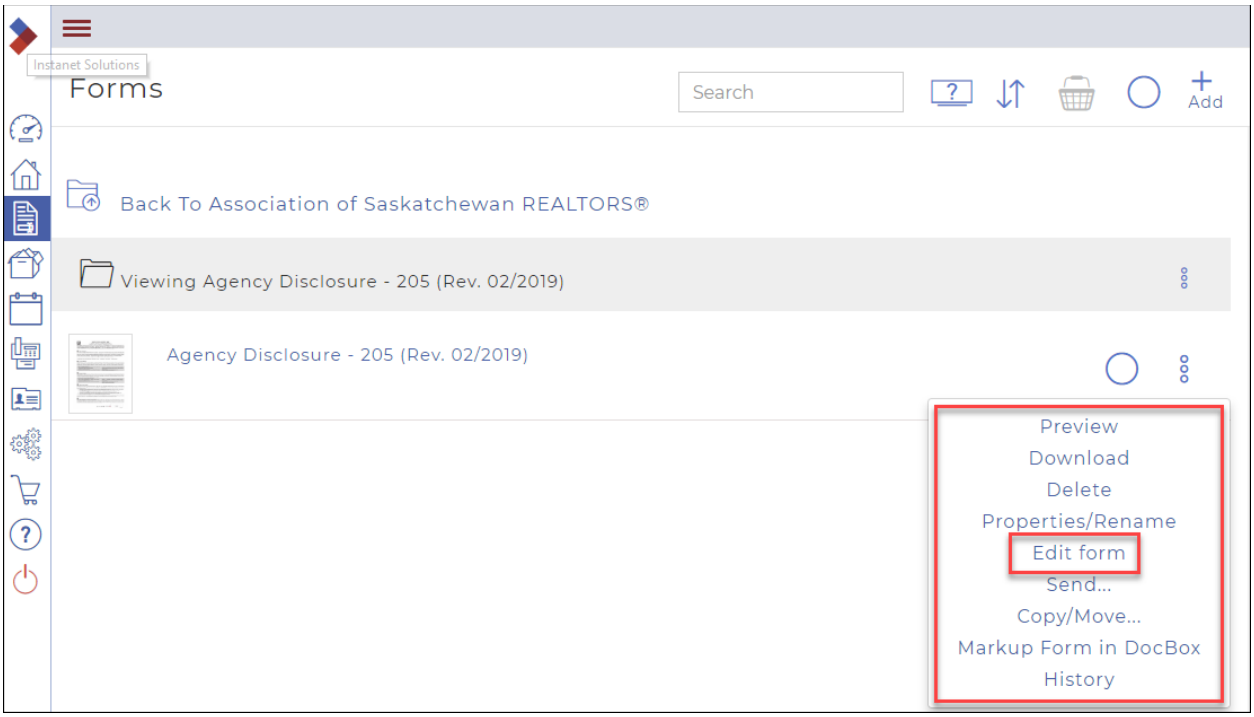
3. Click **Forms** and locate the form you want to edit in a **Forms** folder.



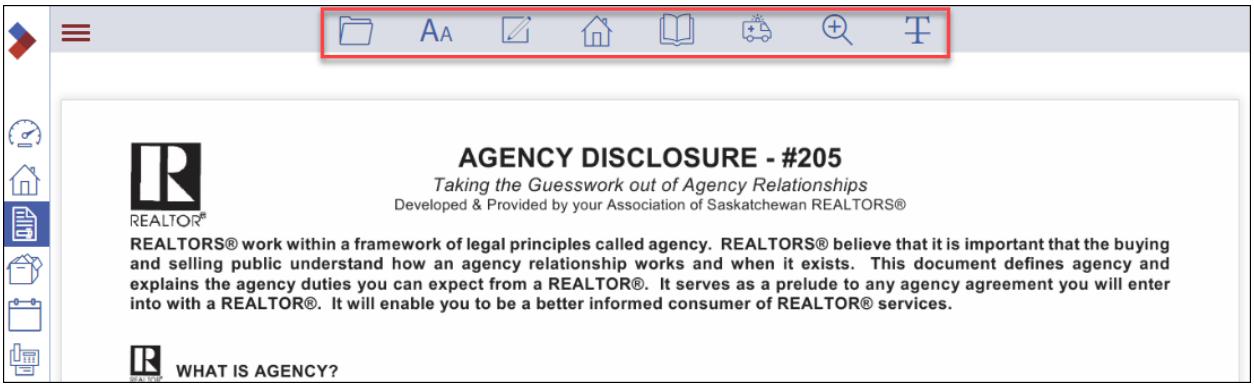
4. Click the **Ellipses Menu** ⋮ beside the form you want to edit.

   Caution: Ensure you select a form, not a form template.

   A dialog box displays the possible actions.

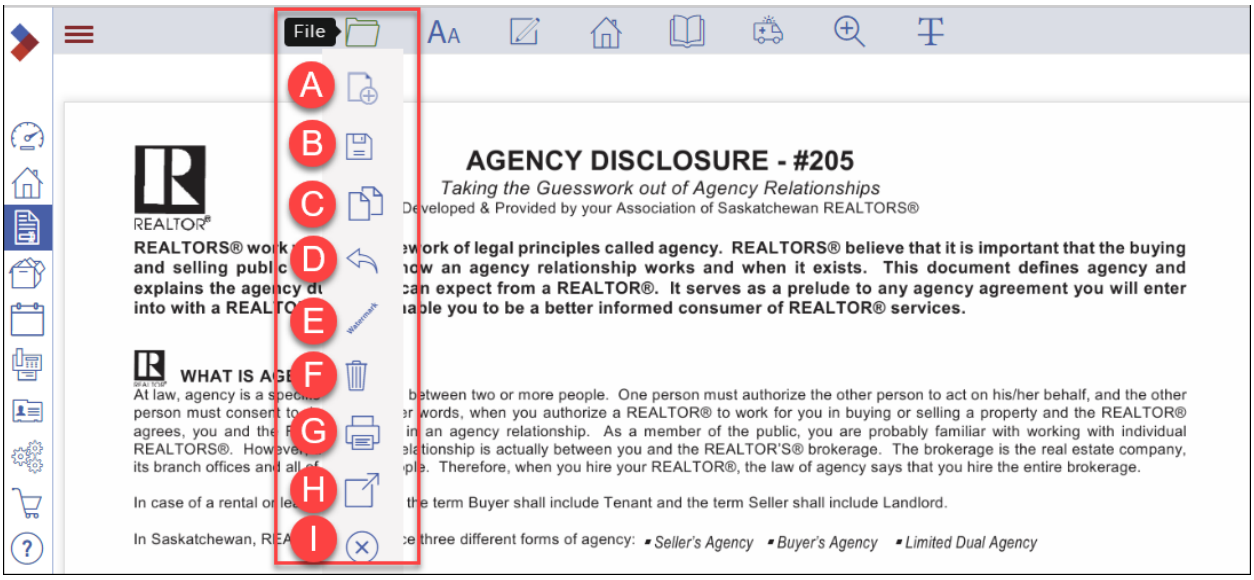


5. Click **Edit form**.
   The selected form opens in the form editor.



6. Use the available form editor options to edit the form's content. The available options are as follows:

File



J. **New Form**

- Use to create a new form using a different form from the current one.

K. **Save**

- Use **Save** Save to save the form to its current folder location

- Use **Save As PDF** Save as PDF to save the form to its current folder location as a pdf file.

L. **Copy**

- Use to create a copy of the current form in the current folder location.

M. **Erase**

- Use **All Pages** All pages to erase any changes made to all pages of the form.

- Use **Current Page** Current page to erase any changes made to the current page of the form.

N. **Watermark**

- Use **Confidential** Confidential to add a confidential watermark across all pages of the form.

- Use **Draft** Draft to add a draft watermark across all pages of the form.

- Use **Remove** Remove to remove any watermarks from all pages of the form.

O. Remove

- Use to delete the current form and return to the list of forms.

P. Print

- Use to print the current form.

Q. **Send**

- Use **Email** Email to email the form from the system. See “Email a Form” for more information.

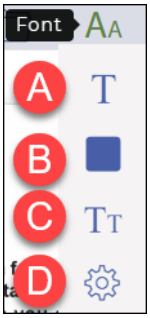
- Use **Fax** Fax to fax the form from the system. See “Fax a Form” for more information.

- Use **DocBox** DocBox to send the form to a selected DocBox folder.

- Use **Markup in DocBox** Markup in DocBox to open the form in the document editor. See “*Mark Up a Document*” for more information.

R. **Exit**
- Use to exit the form editor and return to the list of forms.

Font



E. **Style**
- Use to select the font style, such as Times-Roman, for all editable fields for the entire form.

F. **Color**
- Use to select the font color, for all editable fields for the entire form.

G. **Size**
- Use to select the font size, for all editable fields for the entire form.

H. **Text Functions**

- Use **UPPER CASE** UPPER CASE to set the currently selected field as all upper-case text.

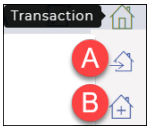
- Use **lower case** lower case to set the currently selected field as all lower-case text.

- Use **Title** Title to set the first character of each sentence in the currently selected field as upper case, and all proceeding characters as lower case.

Clause

Use to select a pre-made clause to add to the selected field.

Transaction



- Use **Add to** to add the form to an existing transaction. See "*Creating a Form*" for more information.
- Use **Start new** to add the form to a new transaction. See "*Create a Form*" for more information.

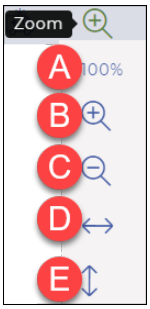
Pages

- Use to move between the form pages.

Help

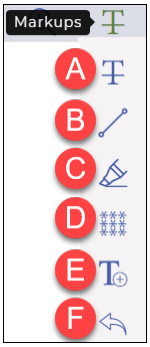
- Use **Help** to view the list of Tutorial Videos

Zoom



F. **Reset Zoom**
   - Use to reset the zoom level to the default (100%).
G. **Zoom in**
   - Use **Zoom In** to increase the magnification of the form.
H. **Zoom out**
   - Use **Zoom Out** to decrease the magnification of the form.
I. **Fit width**
   - Use **Fit Width** to fit the form editor window to the width of the web browser.
J. **Fit height**
   - Use **Fit Height** to fit the form editor window to the height of the web browser

Markups



G. **Strike-out**
   - Use to place a horizontal line on the form.

H. **Line**
- Use to place a line on the form.

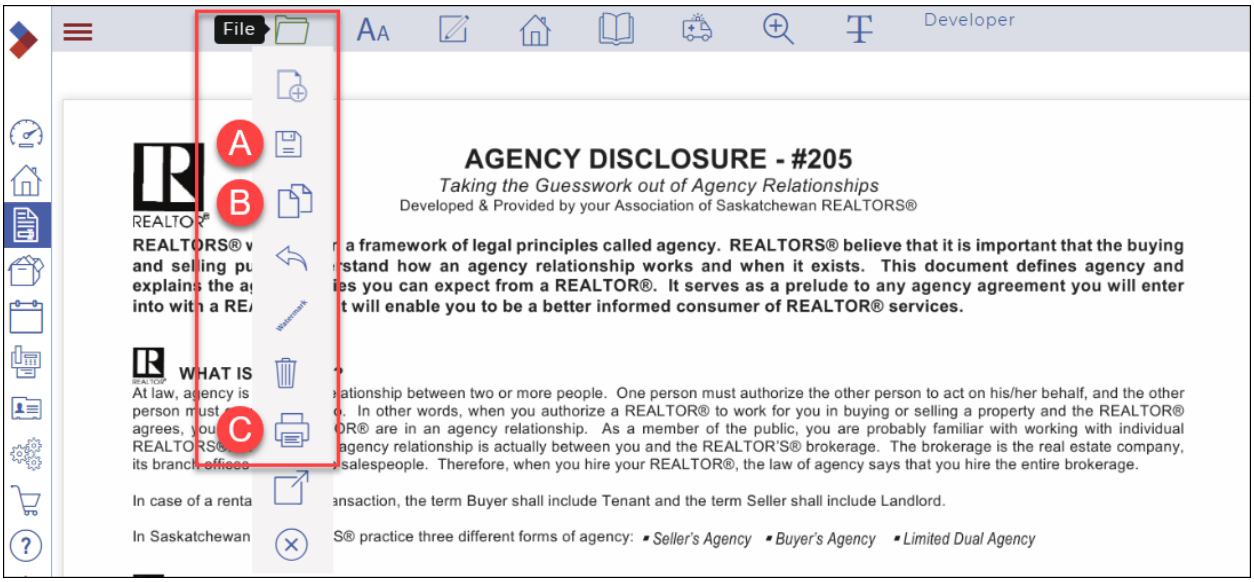
I. **Highlight**
- Use to place a colored rectangle on the form.

J. **Redact**
- Use to hide a rectangular area of the form.

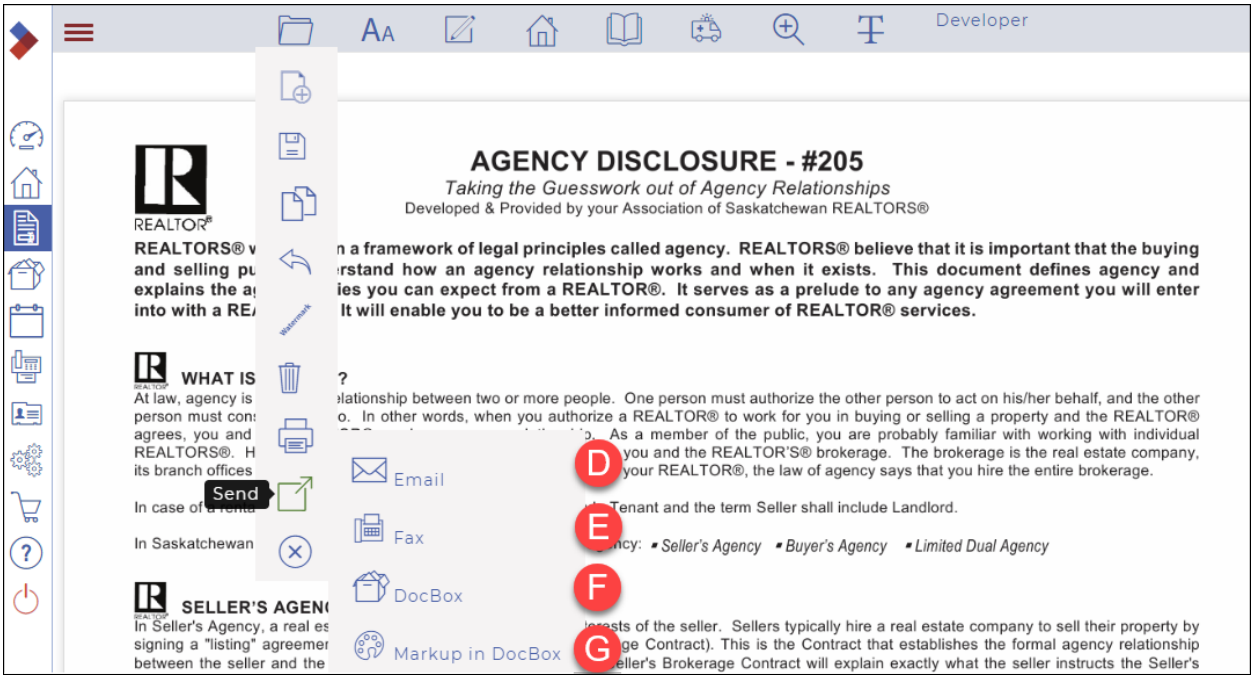
K. **Annotate**
- Use to add a text box to the form. Type any needed information in the text box.

L. **Clear All**
- Removes any markups added to the form.

7. When you are finished editing your form, in the form editor options, do one of the following:



J. Click **File > Save** if you need to save the form to the list of forms.
K. Click **File > Copy** if you need to copy the form.
L. Click **File > Print** if you need to print the form.

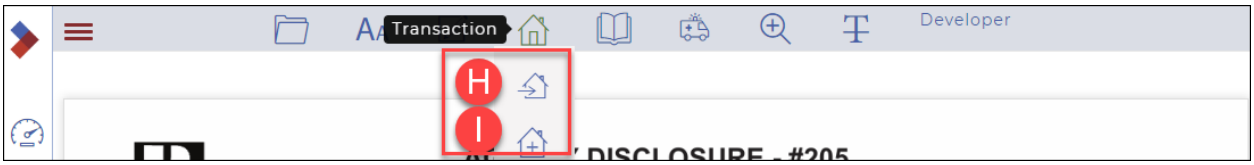


M. Click **File > Send > Email** if you need to send the form as part of an email. See "Email a Form" for more information.

N. Click **File > Send > Fax** if you need to send the form as part of a fax. See "Fax a Form" for more information.

O. Click **File > Send > DocBox** if you need to save the form to a Document folder.

P. Click **File > Send > Markup in Documents** if you need to mark up the form. See "Mark Up a Document" for more information.



Q. Click **Transaction > Add to** to add the form to an existing transaction.

R. Click **Transaction > Start New** to add the form to a new transaction.

Renaming a form

You can rename any forms in your Forms folders at any time to keep your forms organized and easy to locate.

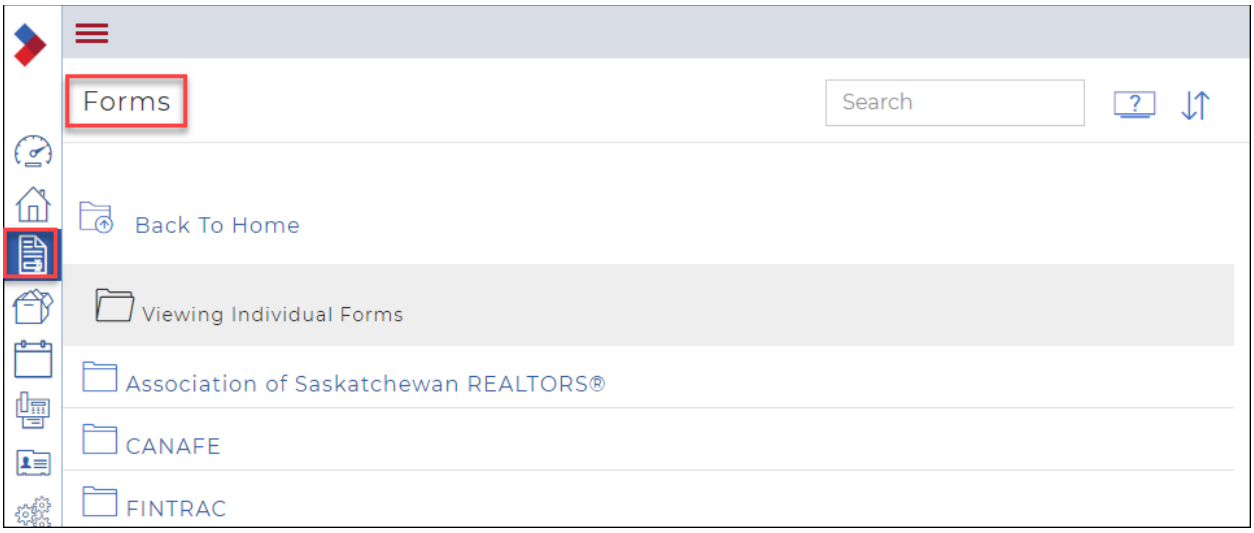
You can rename forms

- contained in the Inbox, My, Shared, and Transaction folders in Forms, and
- from a transaction.

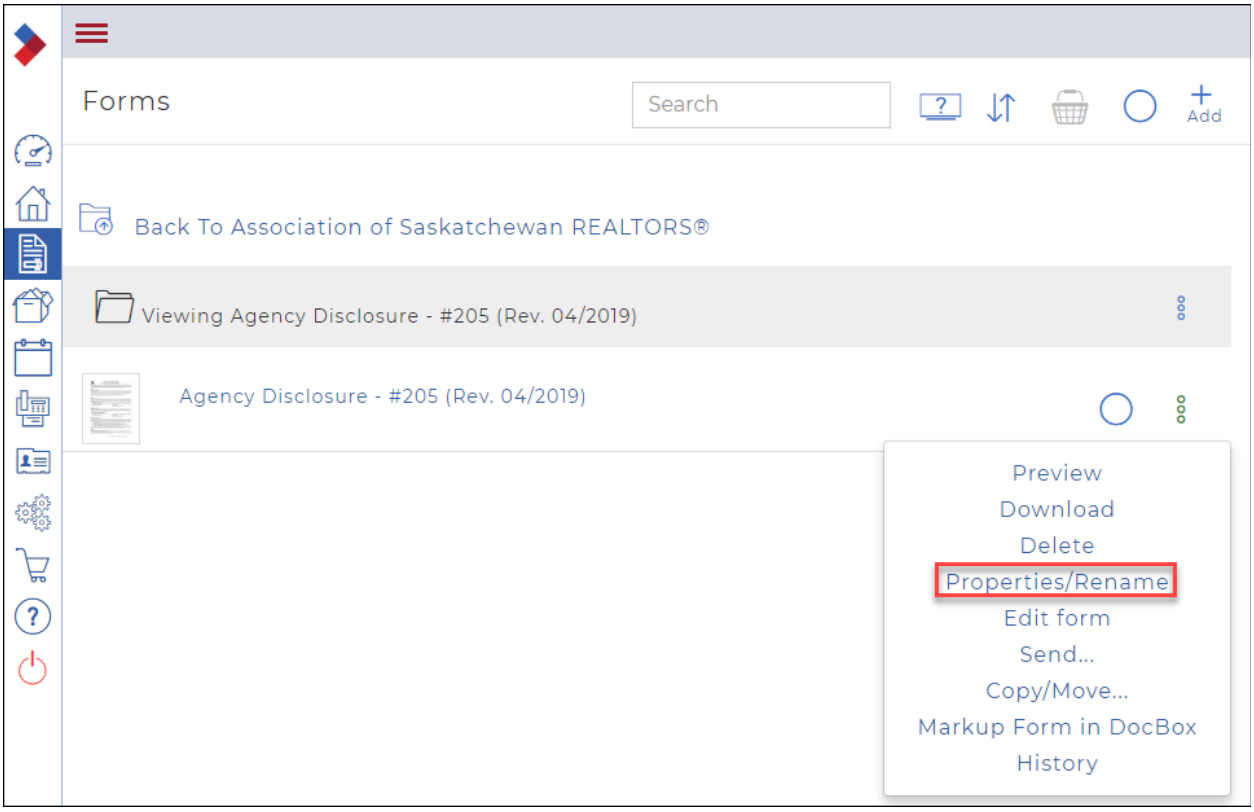
CLICK TO VIEW VIDEO

To rename a form:

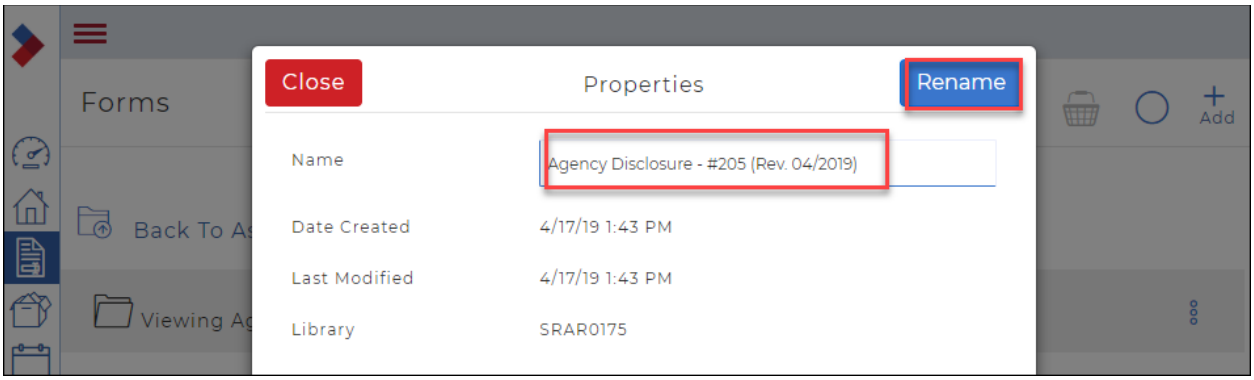
1. In the Sidebar, click **Forms** .
   The **Forms** window displays.



2. Locate the form you want to rename and click the **Ellipses Menu** beside the form.
   The dropdown menu displays several actions.



3. Select **Properties/Rename**.
   The **Properties** dialog box displays.



4. Enter a new name for the form in the **Name** field.
5. Click **Rename**.

   A confirmation message briefly displays in the top right, and the form name is updated in the list of forms.

   Note: If your form name is not immediately updated in your web browser, it is recommended that you reload the web page.

Deleting a form from a transaction

You can delete any unneeded forms. For example, if you uploaded the wrong form to a transaction, you can delete it, ensuring that only the forms that belong with the transaction are attached to it.

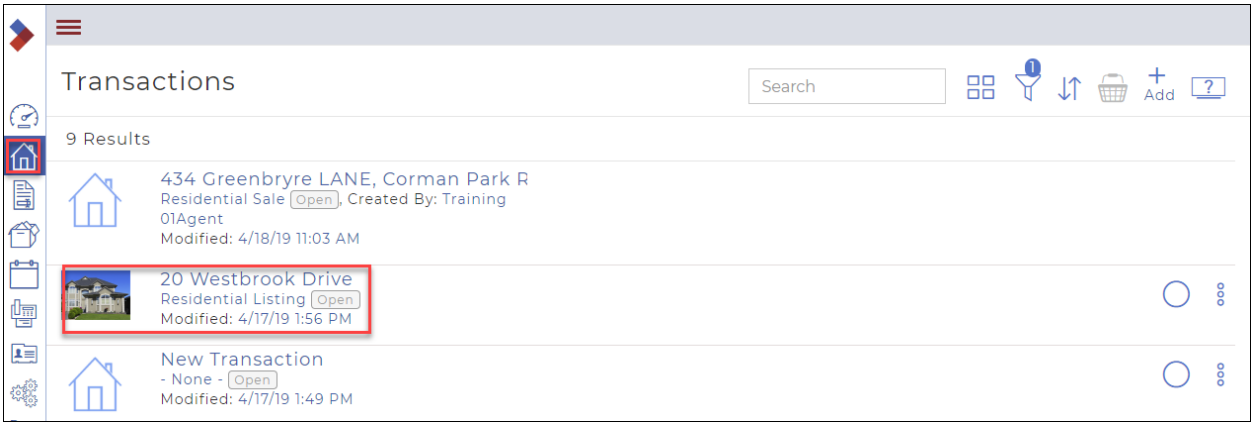
You can delete forms

- in a transaction, and
- contained in the Forms folders.

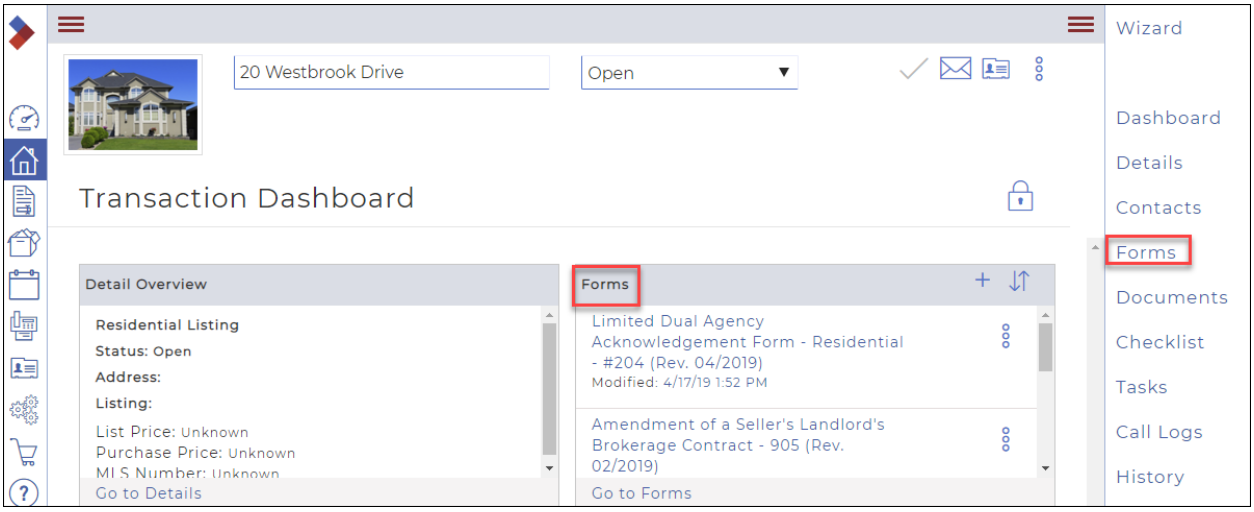
CLICK TO VIEW VIDEO

To delete a form from a transaction:

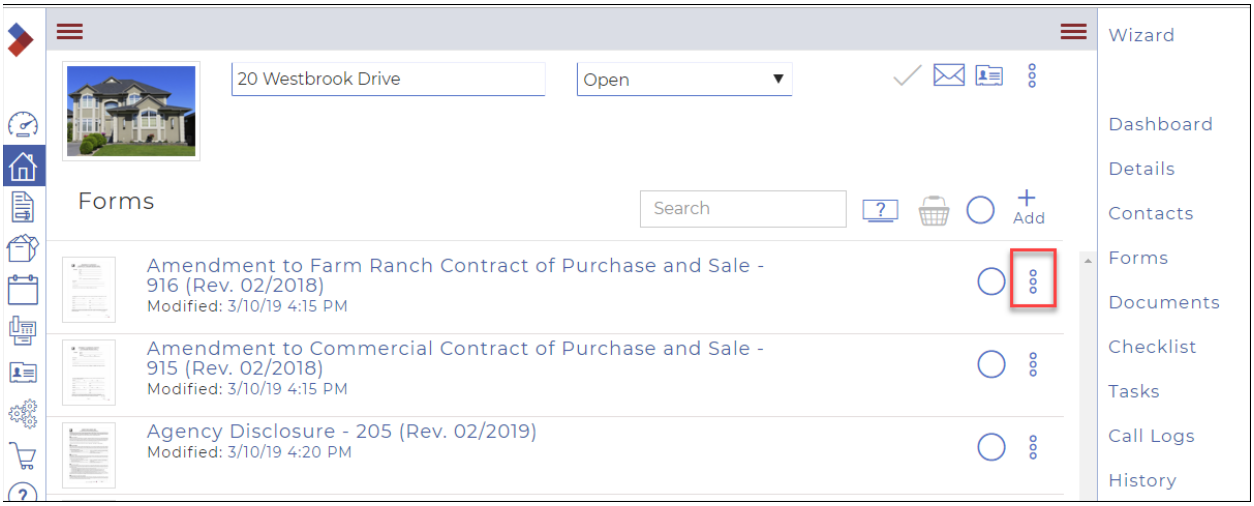
1. Click **Transaction**s in the Sidebar.
   Your **Transactions** display.



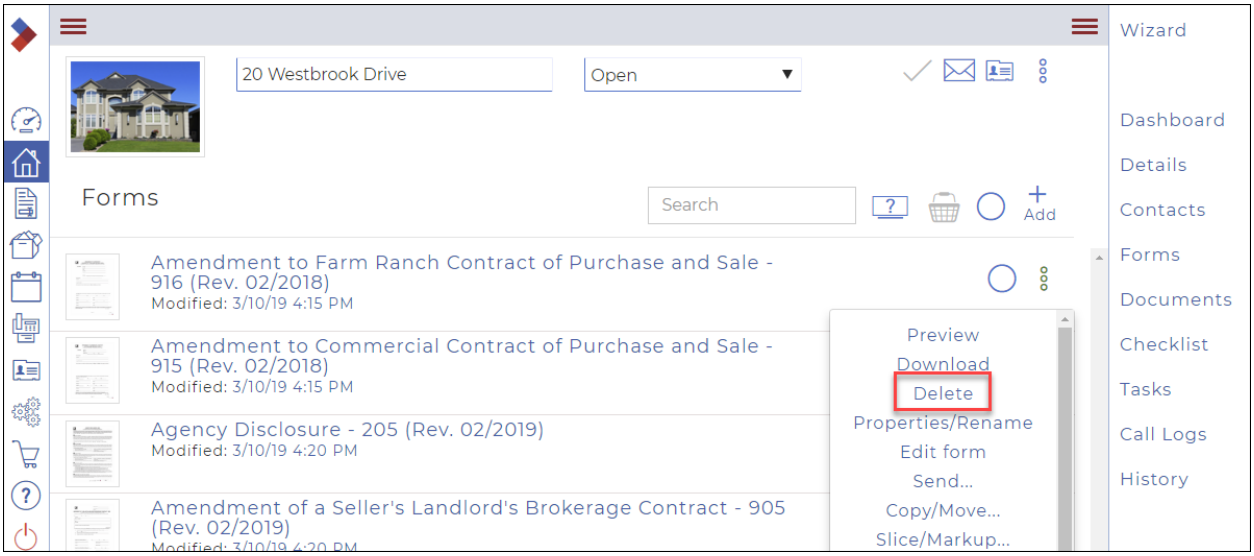
2. Click the name of the transaction from which you want to delete a form.
   The **Transaction Dashboard** displays.



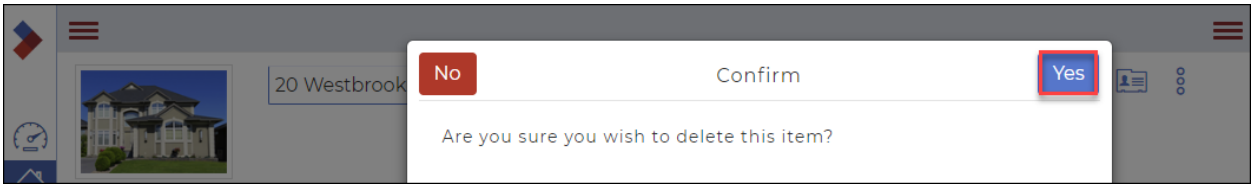
3. In the right sidebar, click **Forms**.
   The list of forms displays.



4. Click the **Ellipses Menu** ⋮ beside the form you want to delete to display a dropdown menu of available actions.



5. Click **Delete**.
   A confirmation dialog box displays, asking you to confirm the deletion.



6. Click **Yes**.

You have now deleted a form from a transaction.

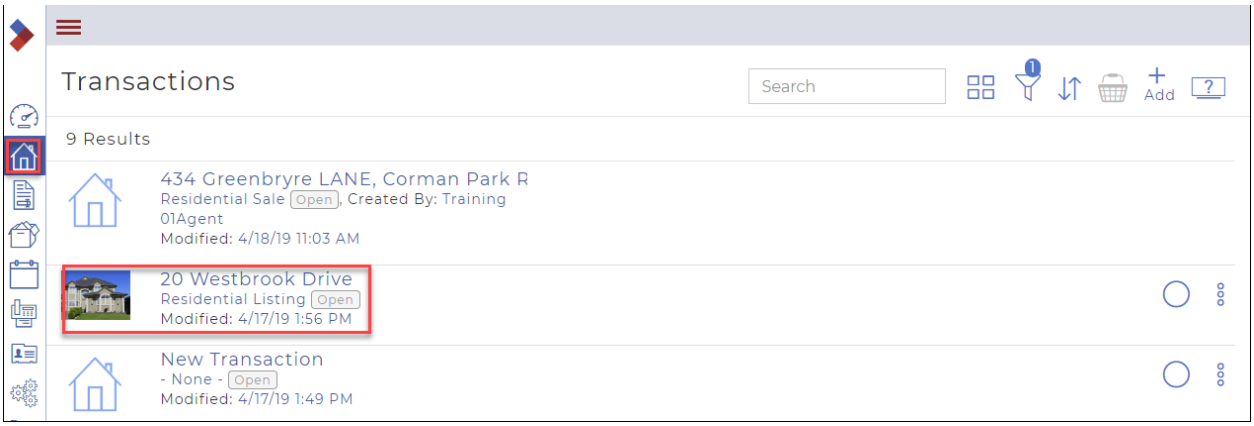
Deleting multiple forms from a transaction

You can delete multiple forms from a transaction all at once.

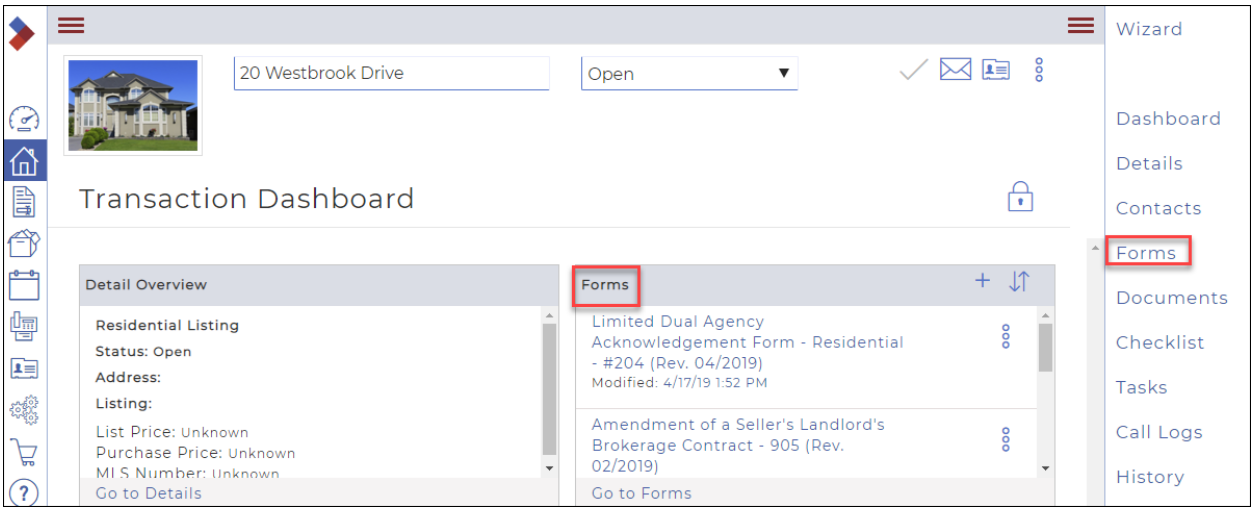
CLICK TO VIEW VIDEO

To delete multiple forms from a transaction:

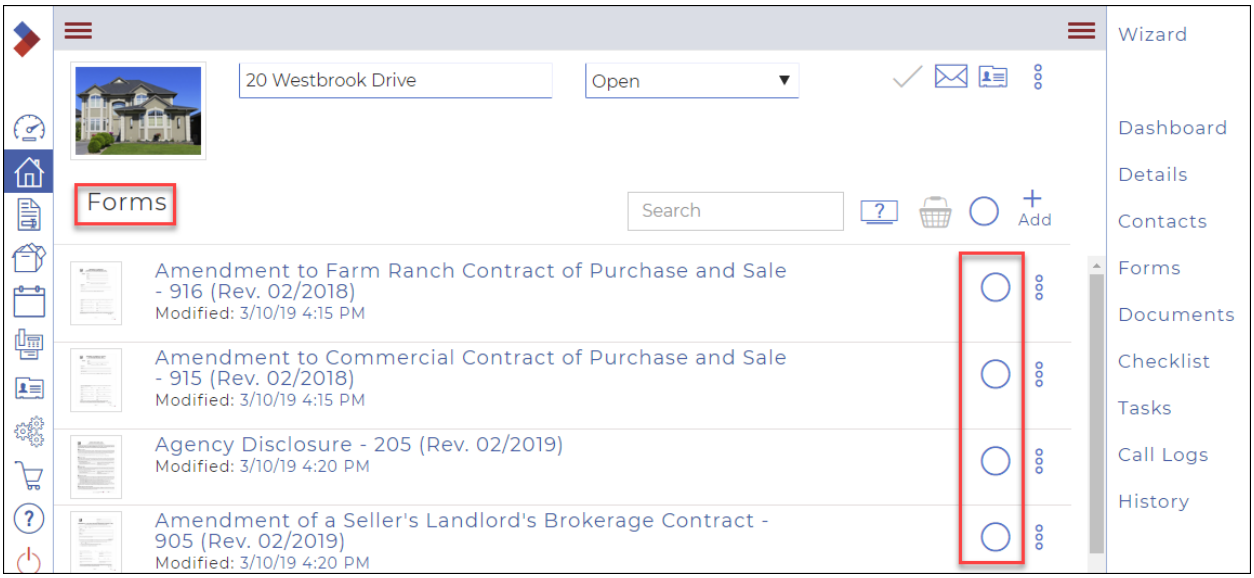
1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



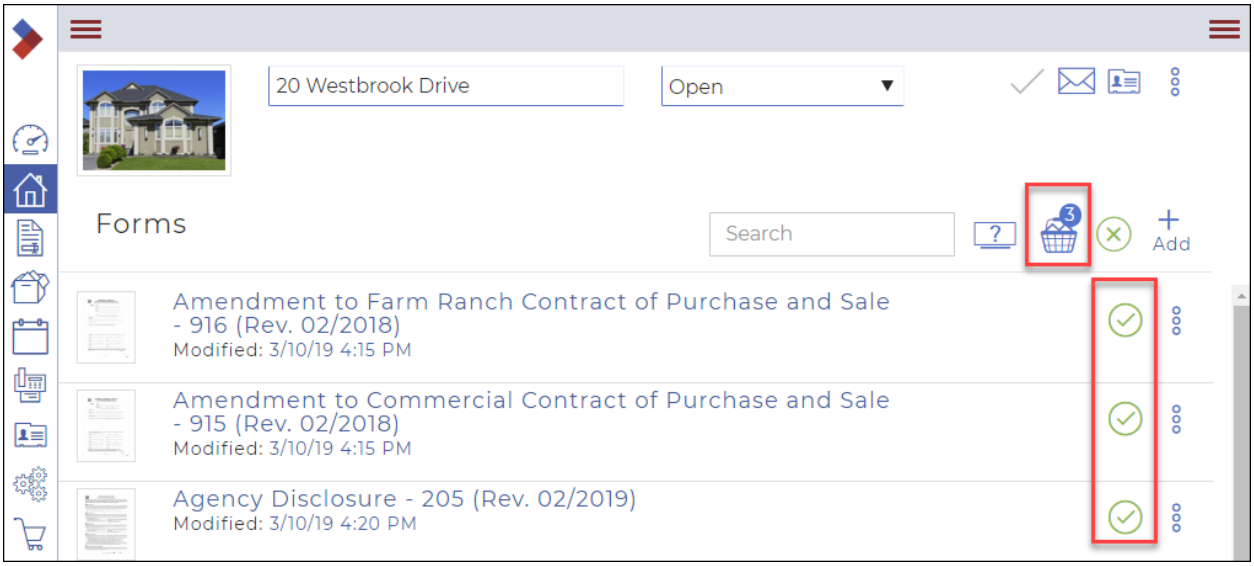
2. Click the name of the transaction from which you want to delete multiple forms.
   The **Transaction Dashboard** displays.



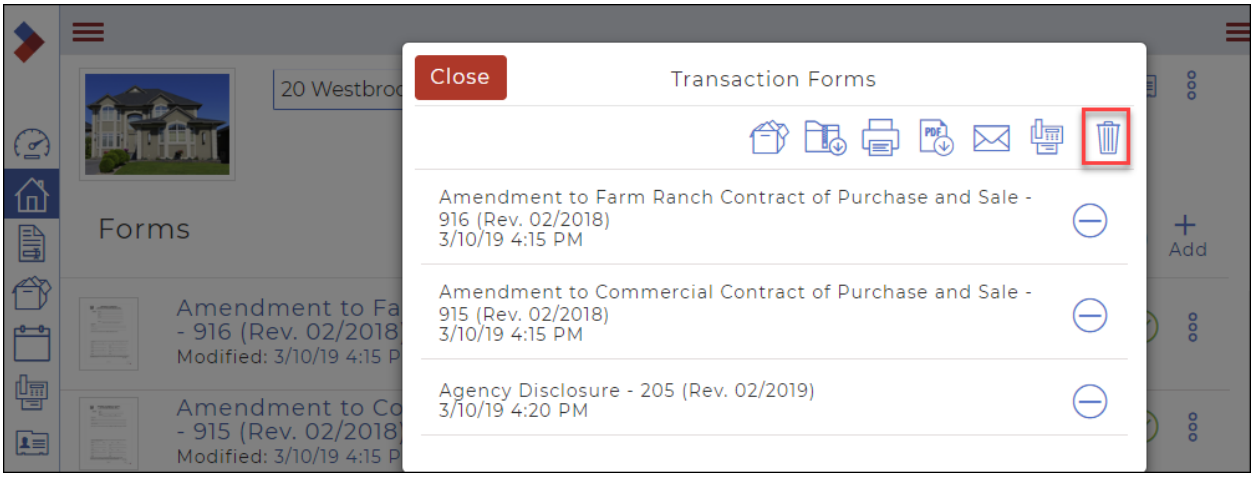
3. In the right sidebar, click **Forms**.
   The list of forms displays.



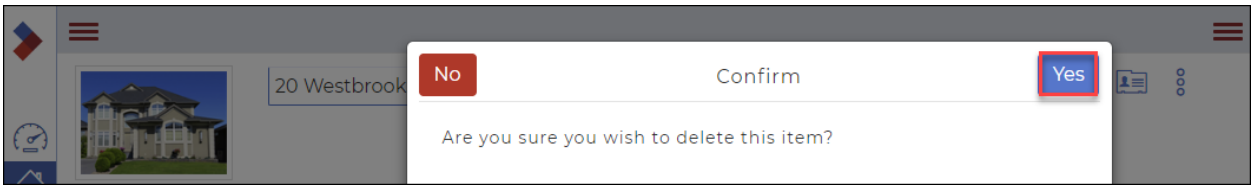
4. Click the circles beside the forms you want to delete.
   The forms will be added to the basket.



5. Click the **Basket** .
   The **Transaction Forms** dialog box displays.



6. Click **Delete** .
   A **Confirm** dialog box displays, asking you to confirm the deletion.



7. Click **Yes**.

You have now deleted multiple forms from a transaction.

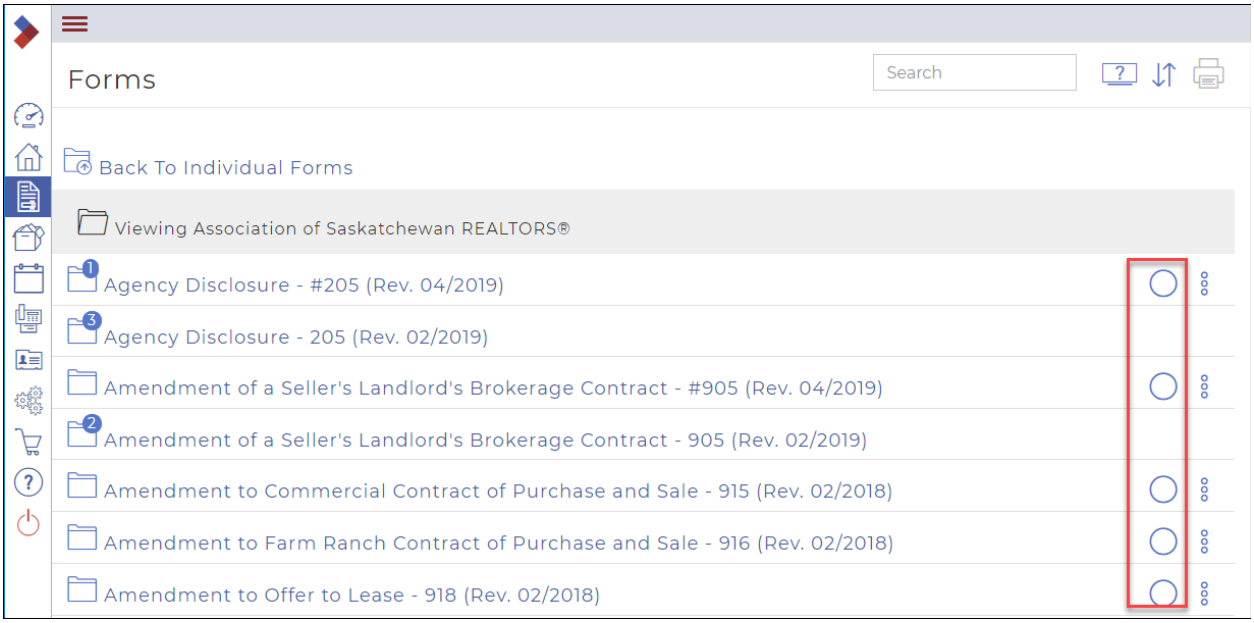
Deleting multiple standalone forms

You can delete multiple forms from the forms folder.

CLICK TO VIEW VIDEO

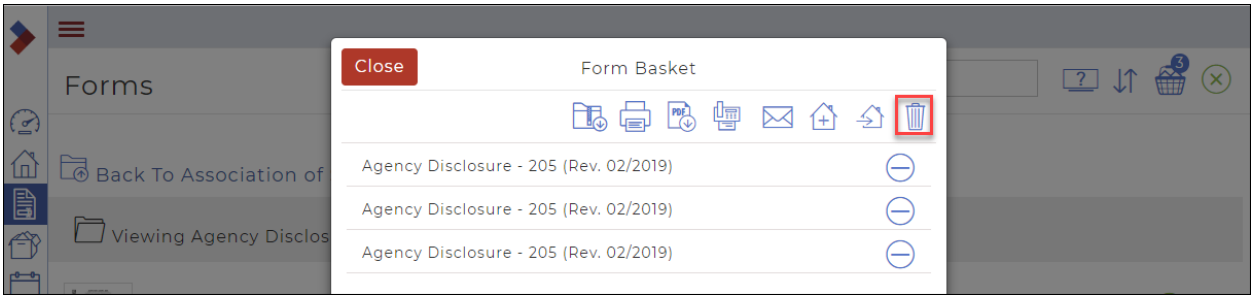
To delete multiple standalone (individual) forms:

1. Click **Forms** in the Sidebar to display the **Forms** window. then locate the forms you want to delete in the **Individual Forms** folder.

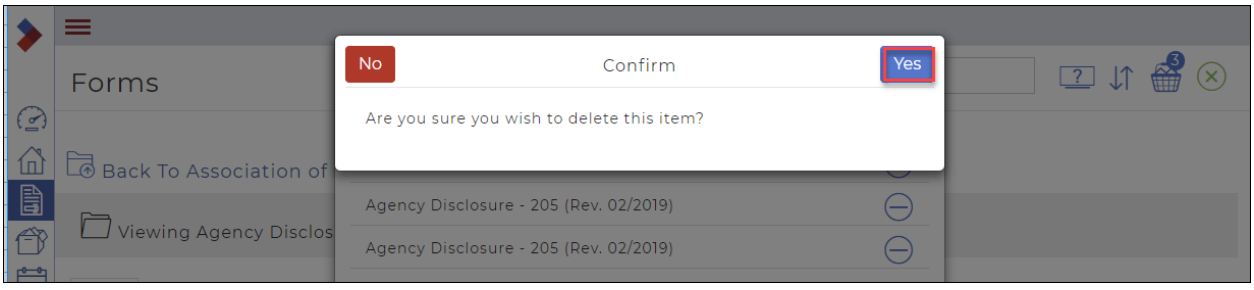


2. Click the selection circle beside the forms you wish to delete.
   The forms are added to the basket.

3. Click the **Basket** .
   The **Form Basket** dialog box displays.



4. Click **Delete** .
   A **Confirm** dialog box displays, asking if you want to delete the item(s).



5. Click **Yes**.

You have deleted multiple standalone (individual) forms.

Filling and editing fields in a form manually

You can fill in the available fields in a form to complete the document, either manually or automatically. The fields are filled in automatically with your MLS® System data if you choose.,

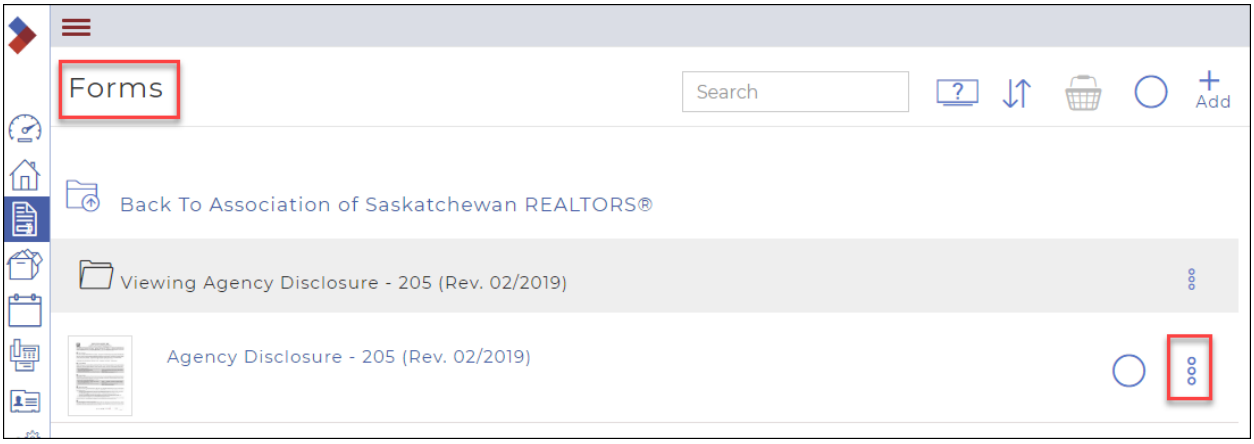
Manually fill in a form when you have not yet entered the deal details in the system. For example: Fill in the form manually when you receive an email with attached PDFs of the deal documentation from an outside broker.

Notes:

- *You can manually edit fields in the Forms folders or in a Transaction.*
- *The available fields vary by form.*
- *Certain fields, such as date fields, display as selectable dropdown menus.*
- *Certain fields, such as date/time fields, or monetary fields are populated with specific information, such as numerical values, like dates, times or money amounts.*
- *Optional: Use the form edit menu options to update the form. See: Editing a Form for more information.*

To fill in fields manually:

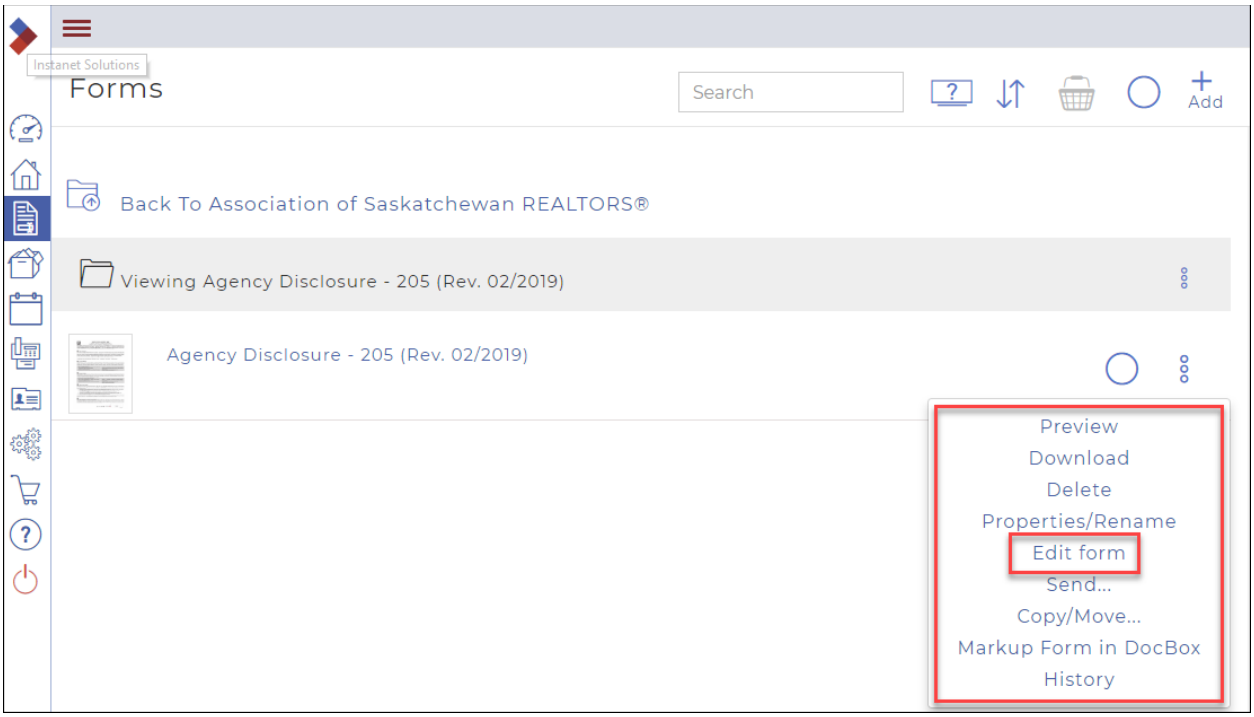
1. Click **Forms** and locate the form you want to edit in a **Forms** folder.



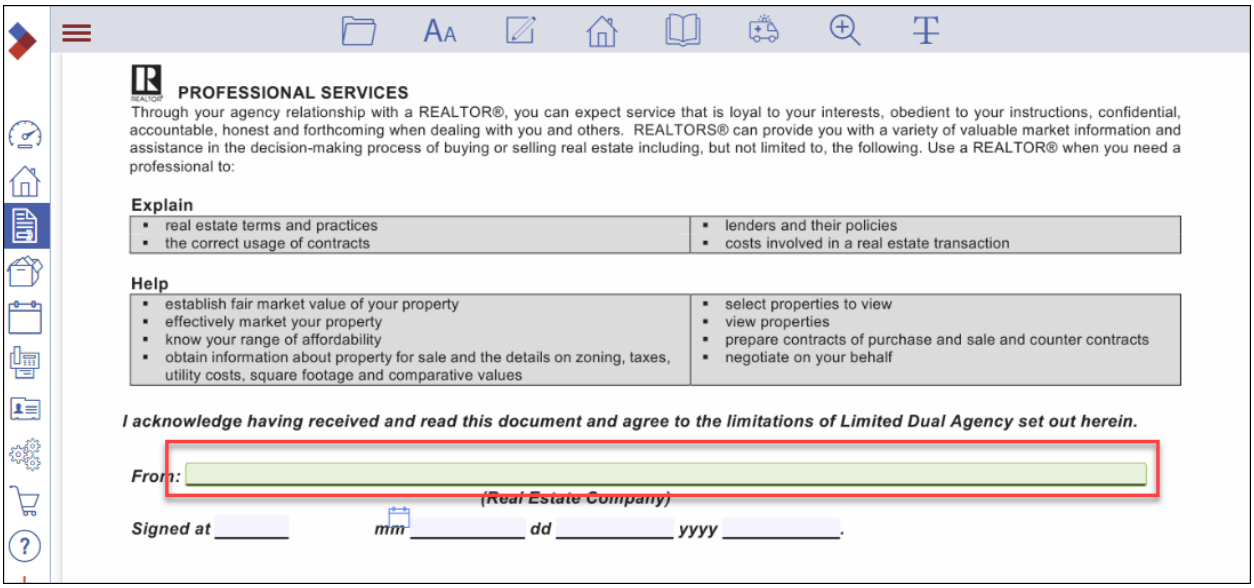
2. Click the **Ellipses Menu** ⋮ beside the form you want to edit.

   Caution: Ensure you select a form, not a form template.

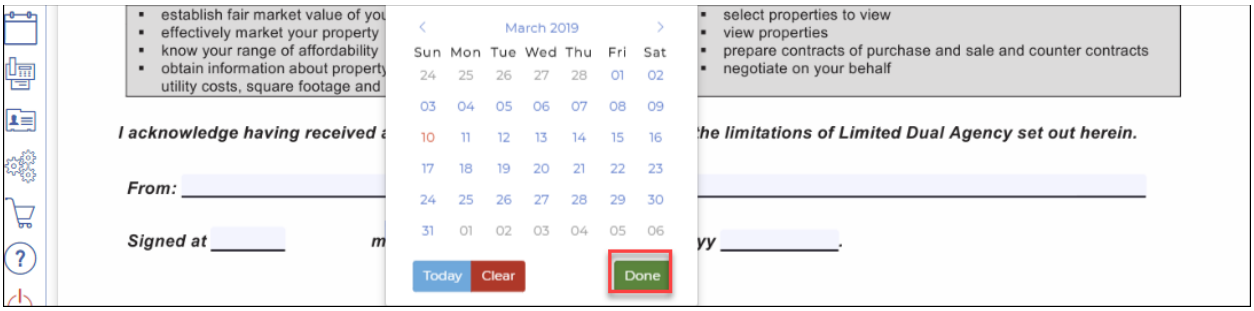
   A dialog box displays the possible actions.



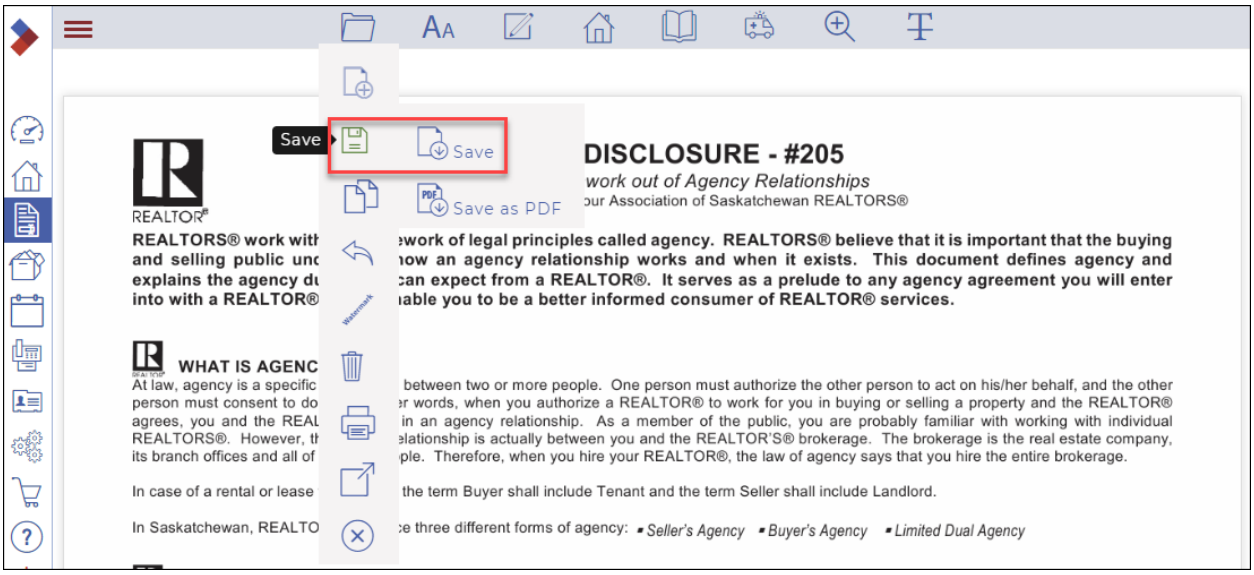
3. Click **Edit form**.
   The selected form opens in the form editor.



4. Scroll to view the editable fields. Click in a field to edit it.
5. To add a date to the document, click the **Calendar** to open the calendar.



6. Select your date and click **Done**.
   The date you selected will populate your form.
7. Click **Save** to save your edits in the Forms Editor.



Copying an individual form

Copy a transaction form to save valuable time and effort when you have a form that already contains most of the information you need within it and needs a few small adjustments before it is used on another deal. For example: Copy a form if you have a buyer representation agreement form on a deal that is mostly filled out, and only the buyer name and date need to be updated on your new deal.

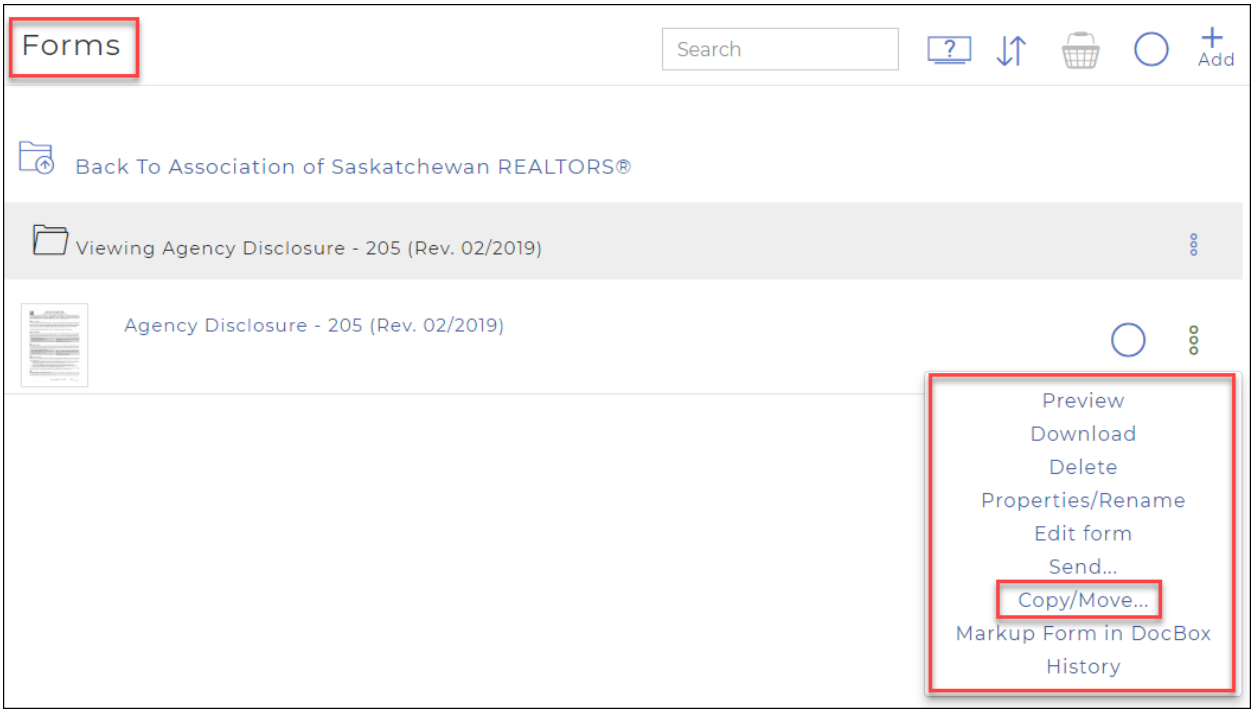
*Note: Only forms that are already attached to deals in the **Transaction Forms** folder can be copied.*

CLICK TO VIEW VIDEO

To copy an individual form:

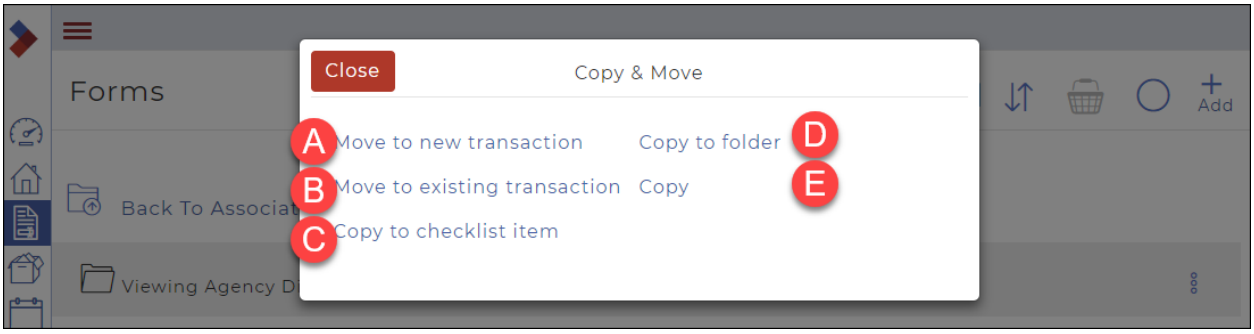
1. Click **Forms** in the Sidebar to display the Forms window. then locate the form you want to copy in the **Individual Forms** folder.

2. Click the **Ellipses Menu** beside the form you want to copy.
   A dialog box displays the possible actions.



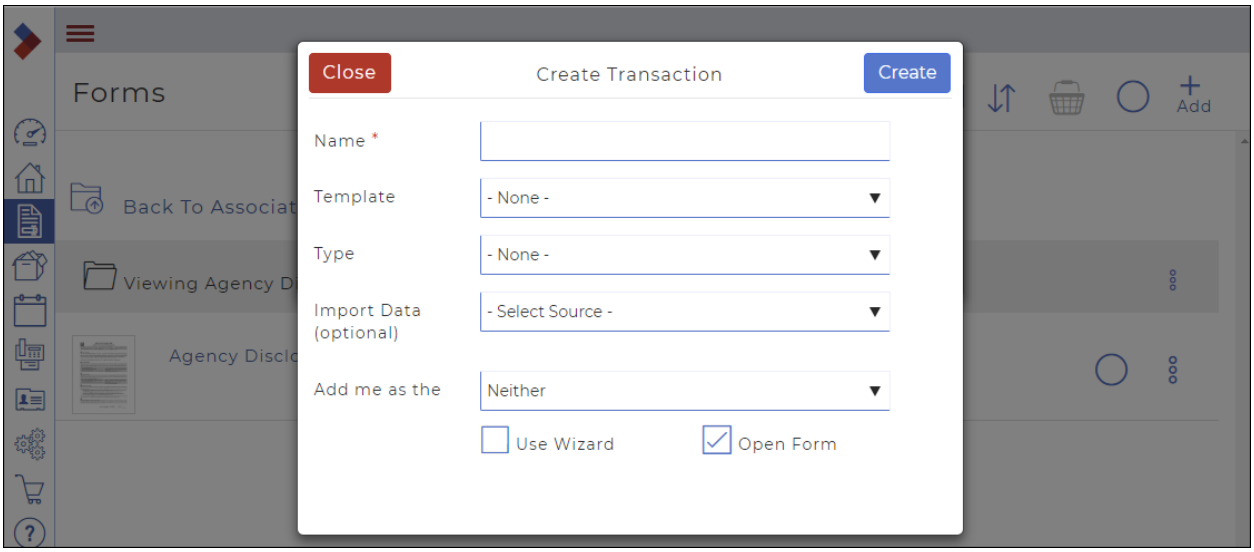
3. Click **Copy/Move**.
   The **Copy & Move** dialog box displays the possible actions.

   Note: The available options vary depending on the type of form, your board or association's rules, and from where in the system you access the form.

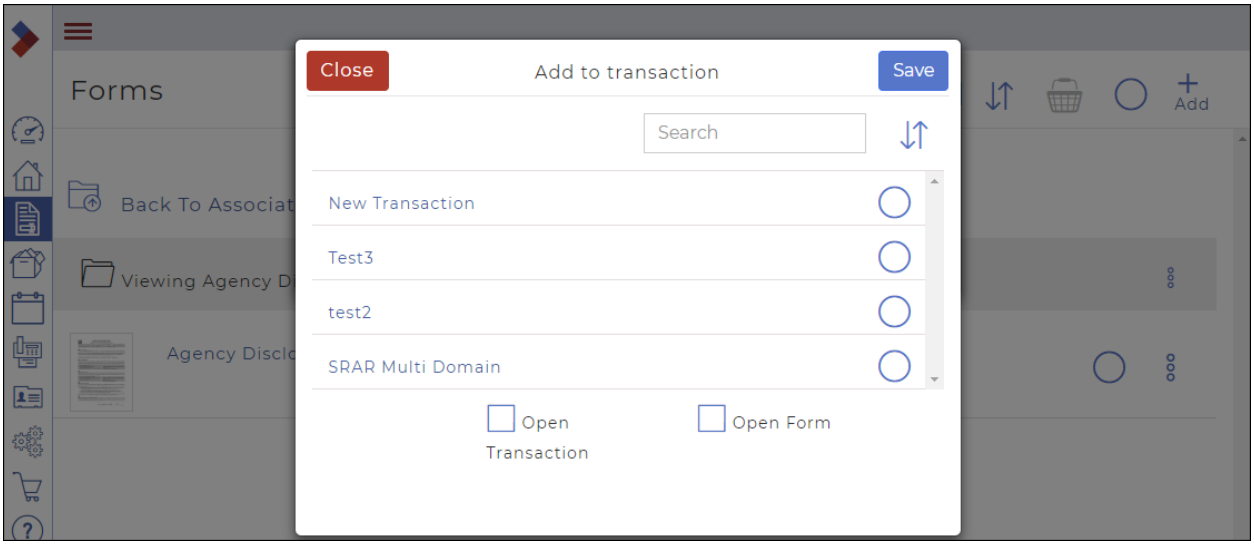


4. Perform the desired action:

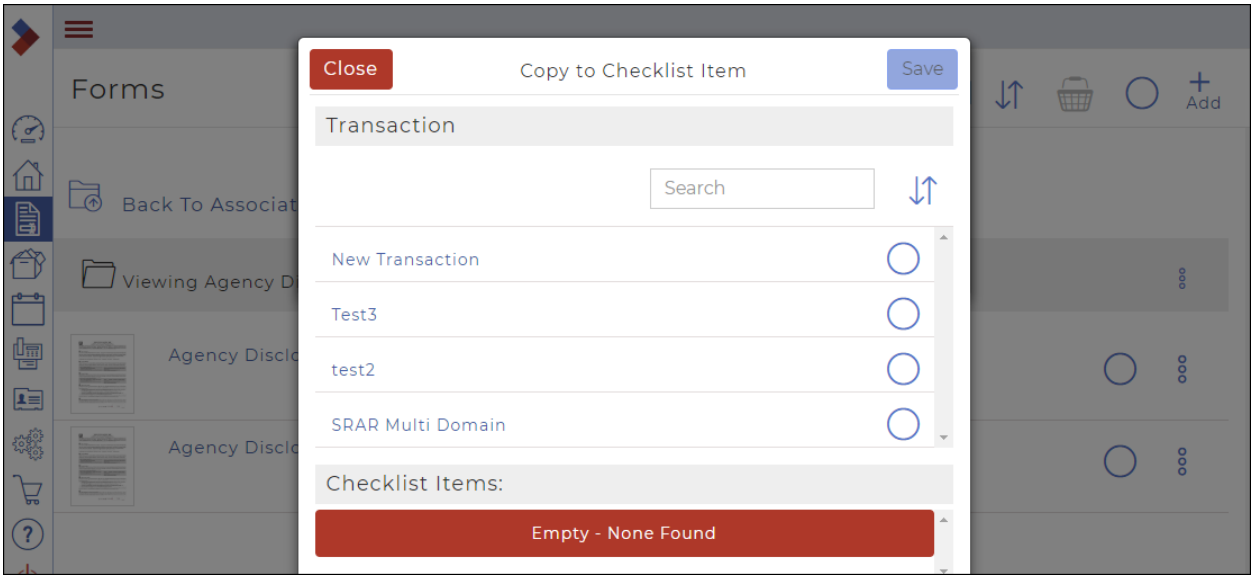
A. Click **Move to new transaction** if you need to move the form out of the current transaction folder into a new Transaction. The **Create Transaction** dialog box displays. Follow the instructions under *Creating a Transaction* to complete the steps.



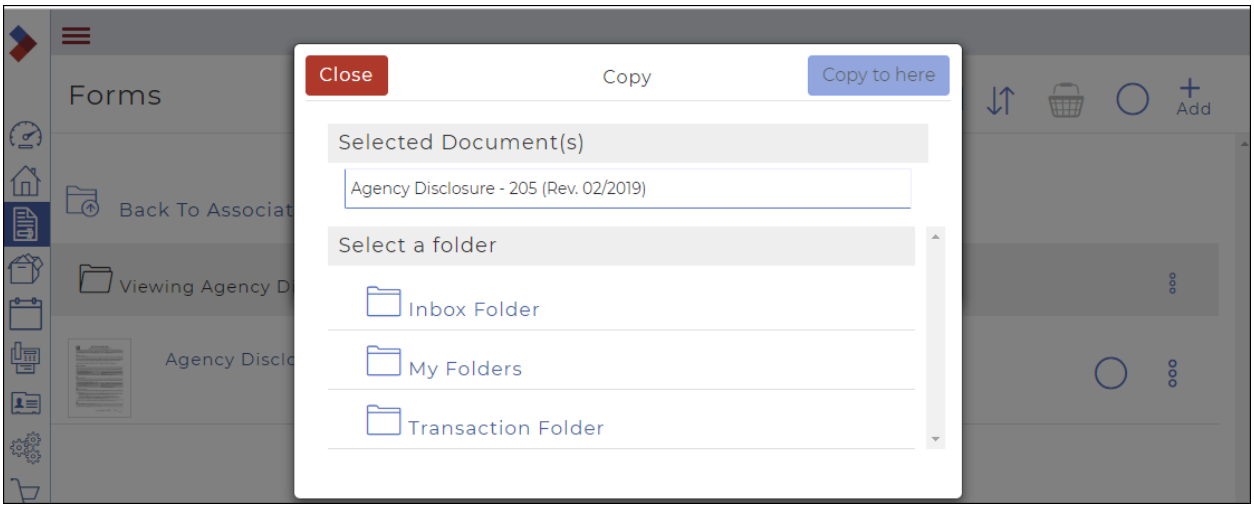
B. Click **Move to existing transaction** if you need to move the form out of the current transaction folder into another transaction folder. Click to select the Transaction from the list and click **Save**.



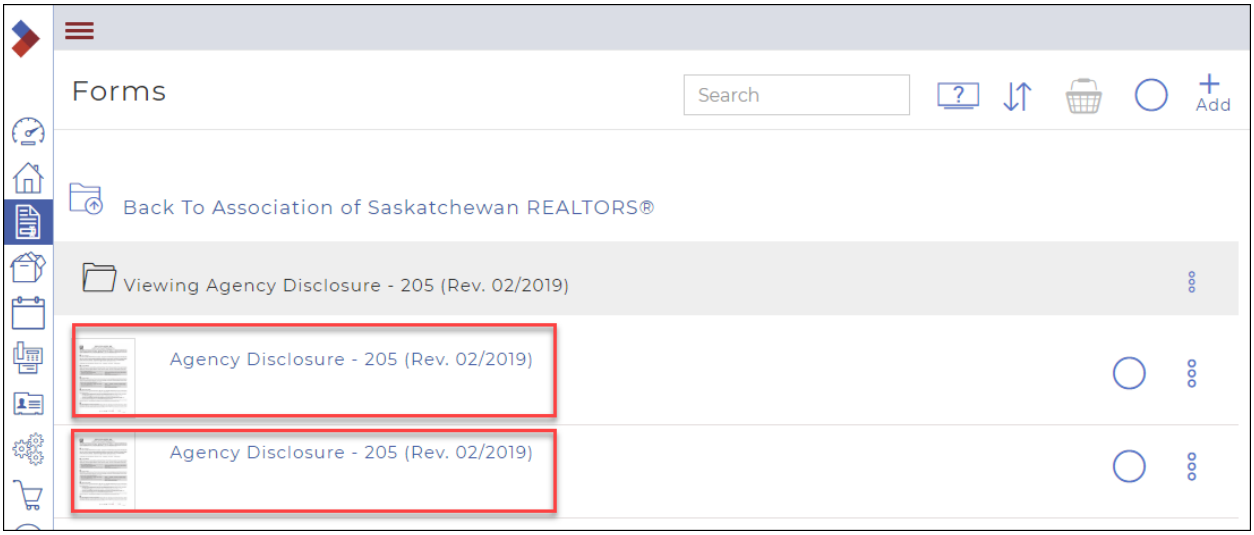
C. Click **Copy to checklist item** if you need to copy the form and attach it directly to a checklist item on a Transaction. Select the Transaction, then select the checklist item and click **Save**.



D. Click **Copy to folder** if you need to save the form as a document. Select the Document folder you need to save the form to and click **Copy to here**.



E. Click **Copy** if you need to copy the form to the current folder. It will automatically add a copy to the folder.



Copying a transaction form

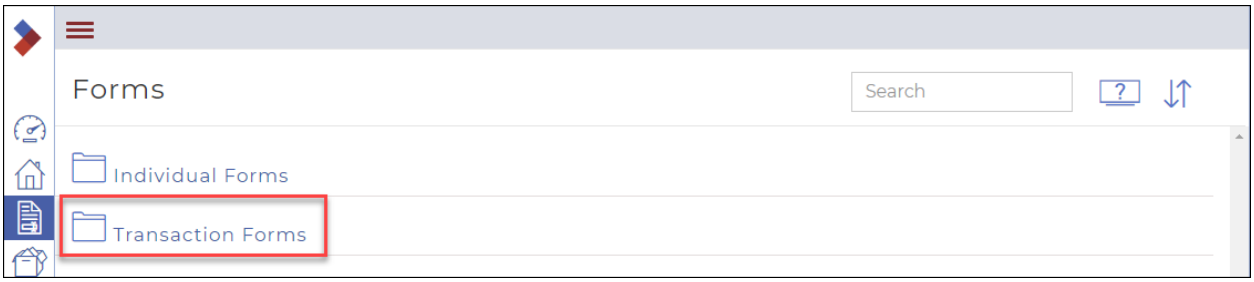
Copy a transaction form to save valuable time and effort when you have a form that already contains most of the information you need within it and needs a few small adjustments before it is used on another deal. For example: Copy a form if you have a buyer representation agreement form on a deal that is mostly filled out, and only the buyer name and date need to be updated on your new deal.

*Note: Only forms that are already attached to deals in the **Transaction Forms** folder can be copied.*

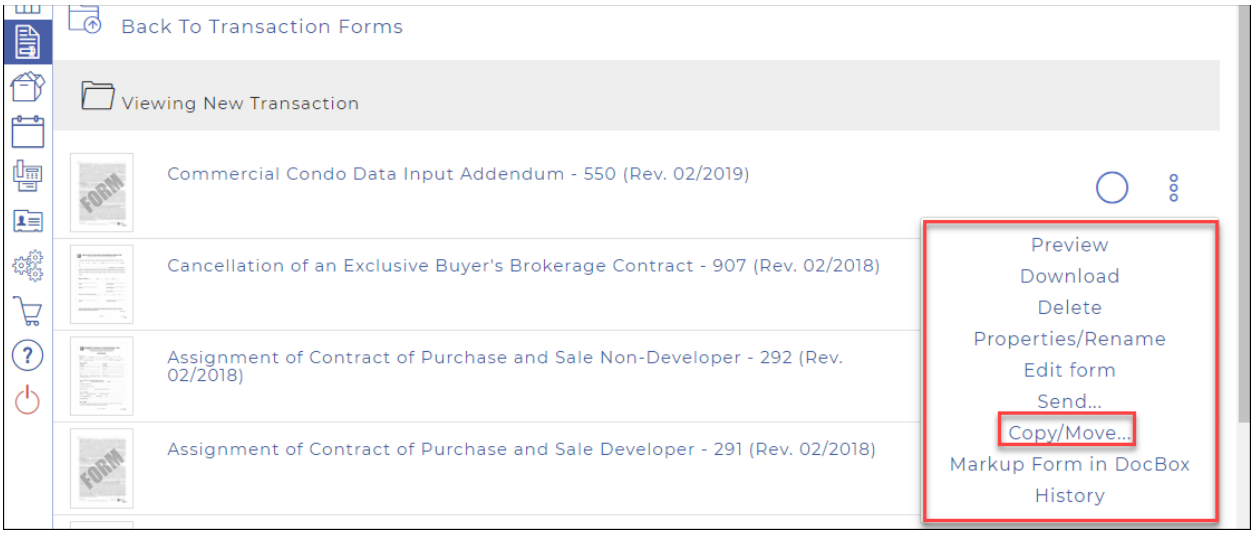
CLICK TO VIEW VIDEO

To copy a transaction form:

1. Click **Forms** and locate the form you need to copy in the **Transaction Forms** folder.

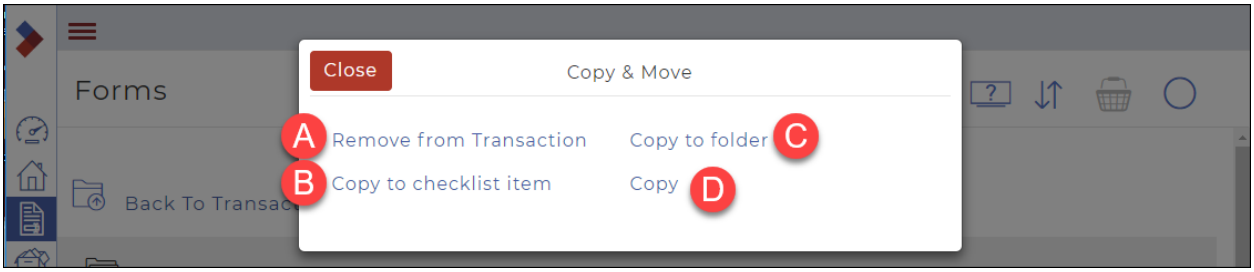


2. Click the **Ellipses Menu** ⋮ beside the form you want to copy.
   A dialog box displays the possible actions.

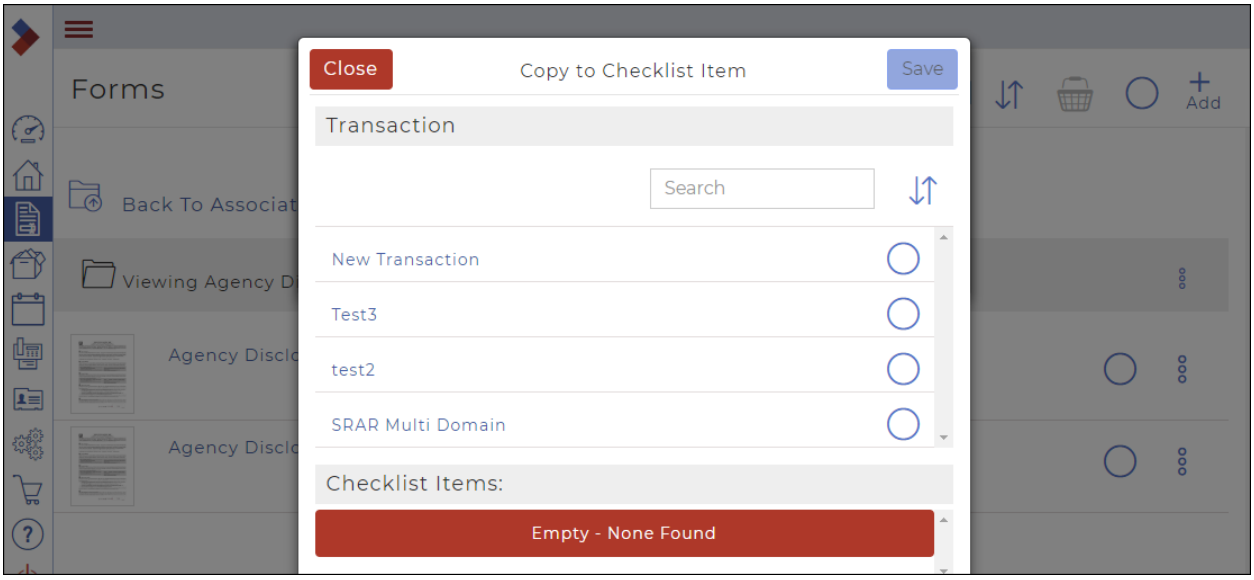


3. Click **Copy/Move**.
   The **Copy & Move** dialog box displays the possible actions.

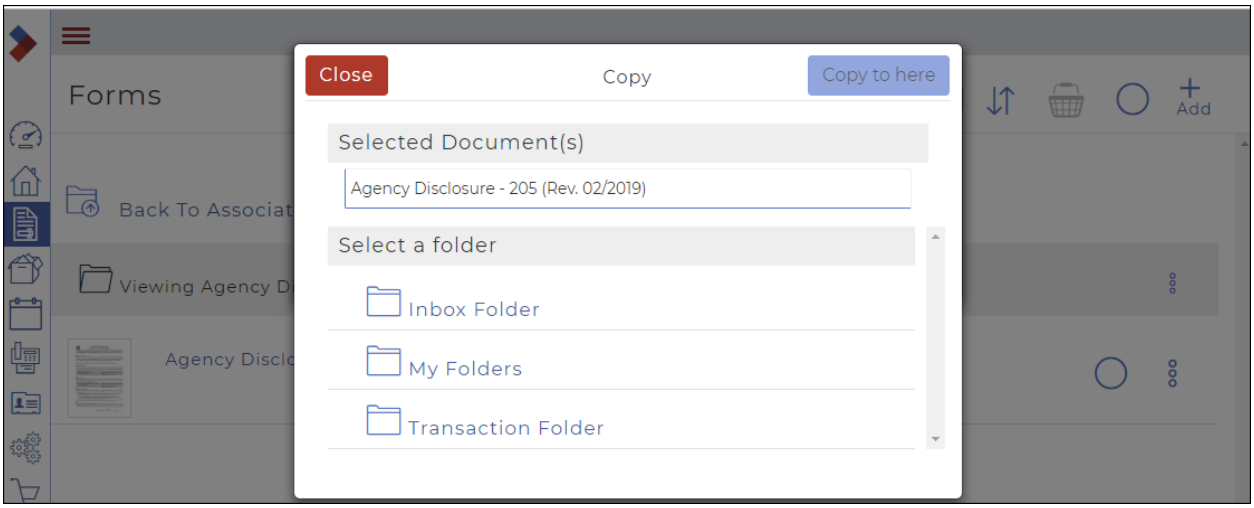
   Note: The available options vary depending on the type of form, your board or association's rules, and from where in the system you access the form.



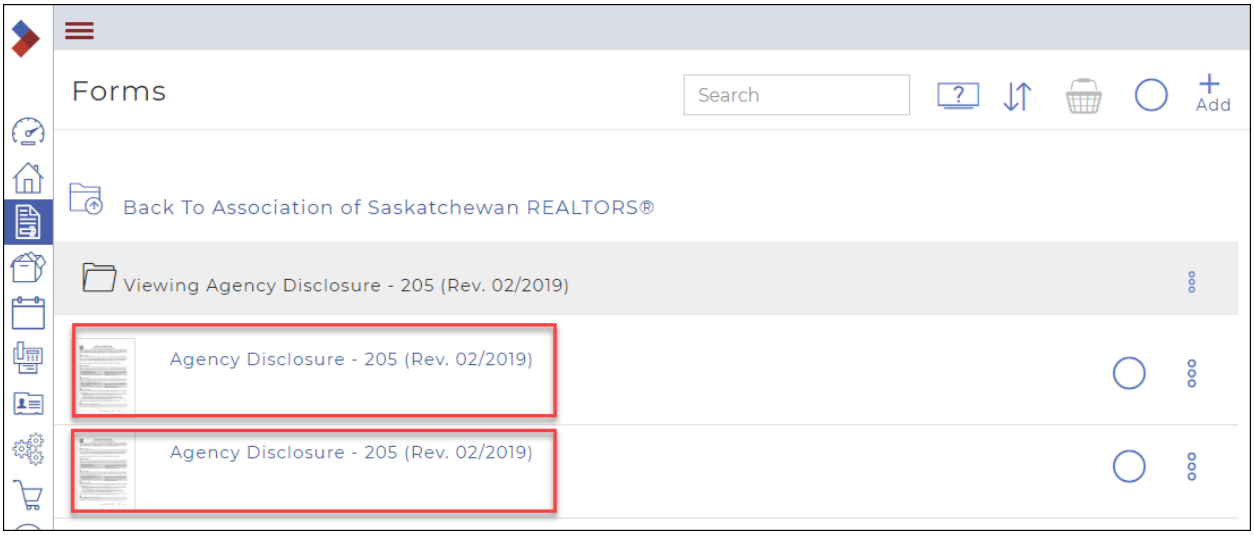
4. Perform the desired action:
   A. Click **Remove from Transaction** if you need to remove the form from the current transaction. The form is automatically removed from the list.
      Caution: This can't be undone, if you remove it and want it back in you will have to add it again.
   B. Click **Copy to checklist item** if you need to copy the form and attach it directly to a checklist item on a Transaction. Select the Transaction, then select the checklist item and click **Save**.



C. Click **Copy to folder** if you need to save the form as a document. Select the Document folder you need to save the form to and click **Copy to here**.



D. Click **Copy** if you need to copy the form to the current folder. It will automatically add a copy to the folder.



Copying a form to documents

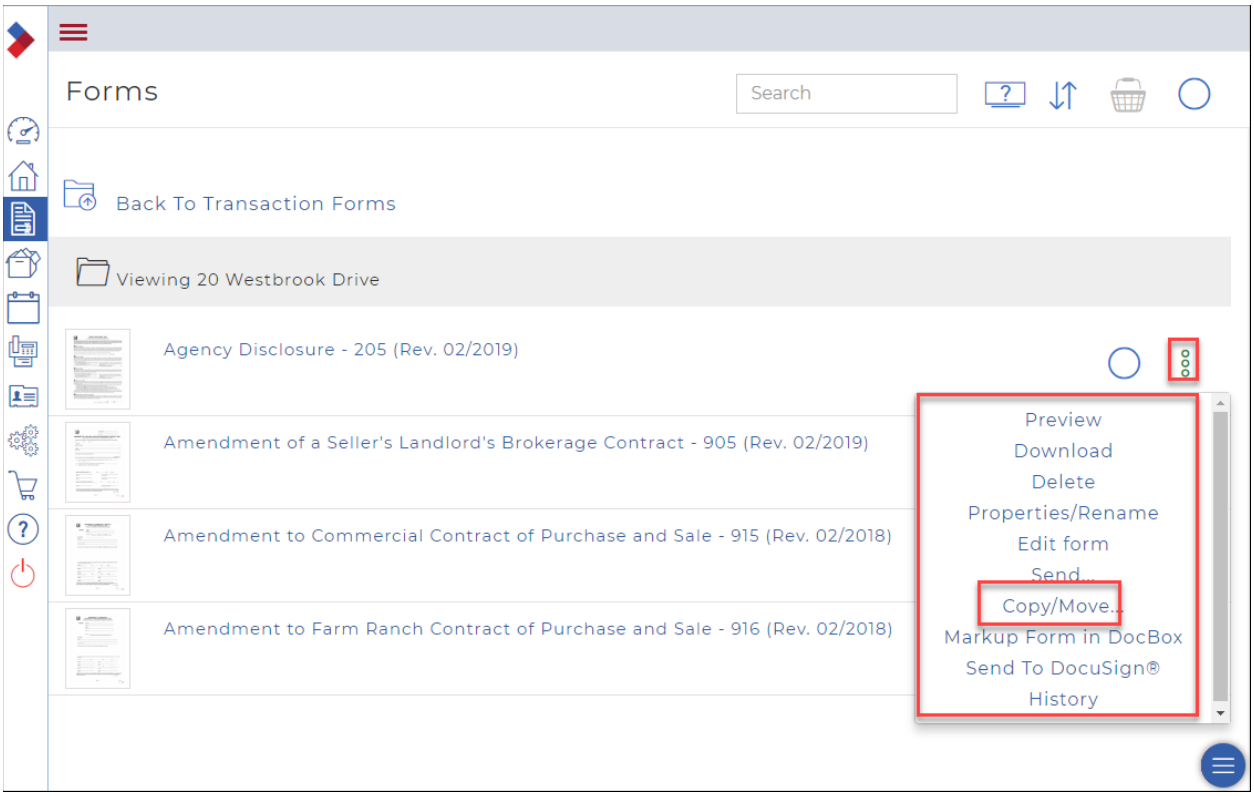
You can copy a form to the Inbox folder that contains your documents.

CLICK TO VIEW VIDEO

To copy a form to documents:

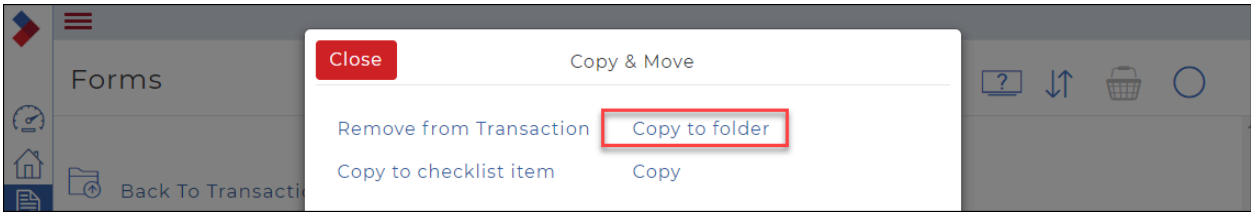
1. Click **Forms** and locate the form you want to copy in the **Forms** folder.

2. Click the **Ellipses Menu** beside the form you want to copy.
   A dialog box displays the possible actions.

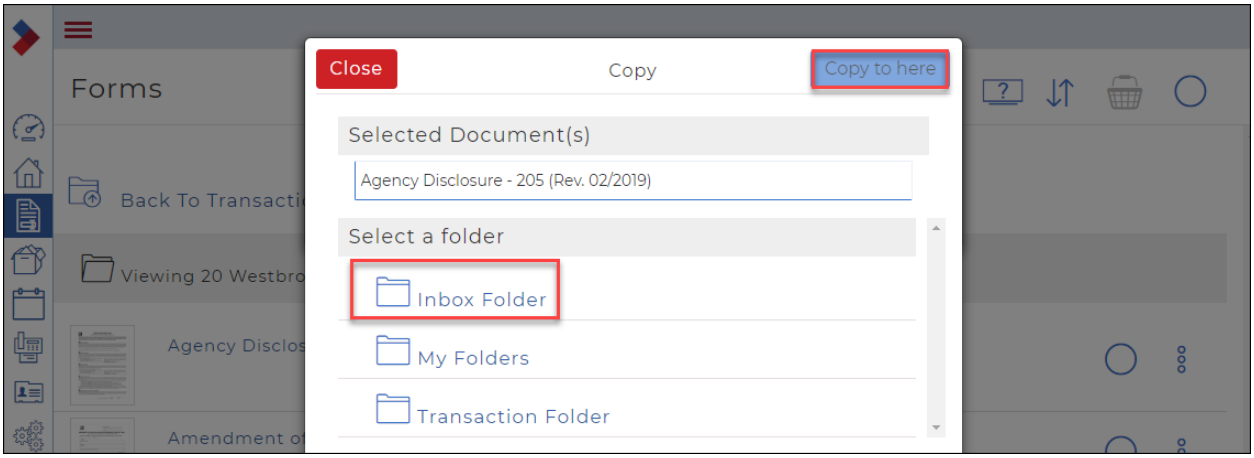


3. Click **Copy/Move**.
   The **Copy & Move** dialog box displays the possible actions.

   Note: The available options vary depending on the type of form, your board or association's rules, and from where in the system you access the form.



4. Click **Copy to folder**.
   The **Copy** dialog box displays.



5. Select the folder you want to copy the form to, then click **Copy to here**.
   A confirmation message briefly displays in the top right.

6. Click **Close**.

Emailing a form from the forms folders

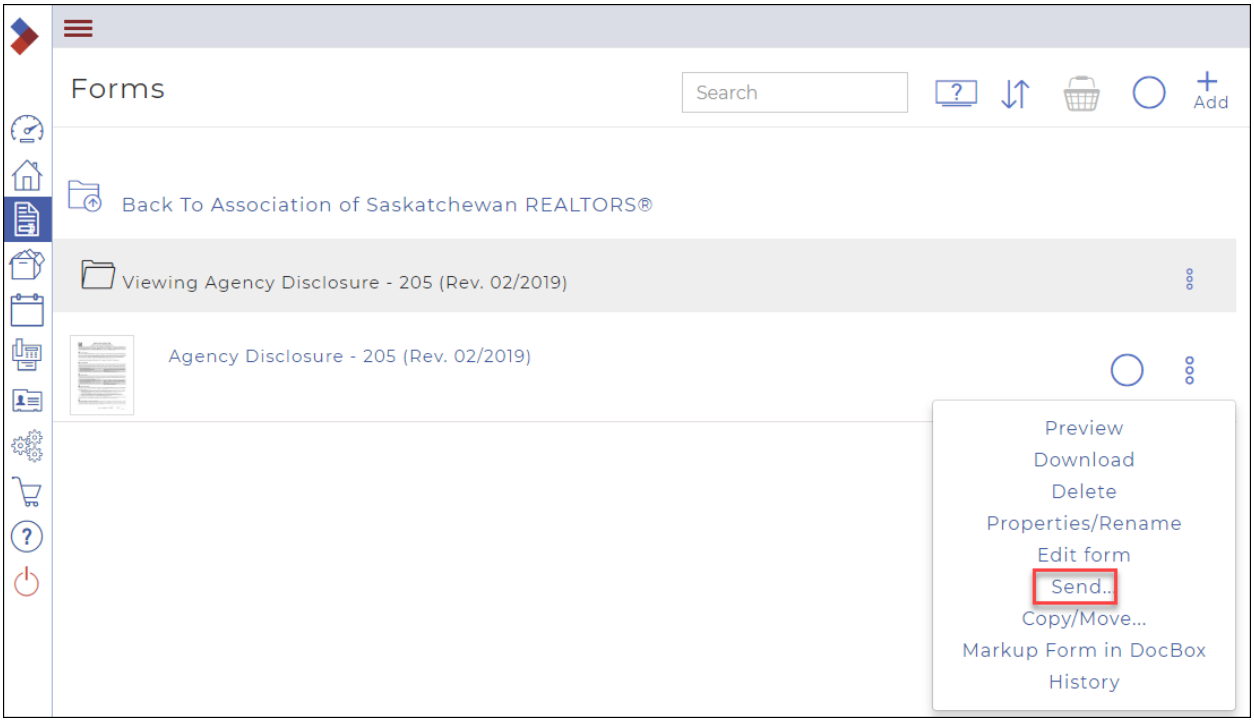
You can use the system to email a form to a specific recipient from within the application. This functionality is convenient because it means that you do not have to download the form from the system, and then attach it to an email in your email client, and then send it to the recipient.

CLICK TO VIEW VIDEO

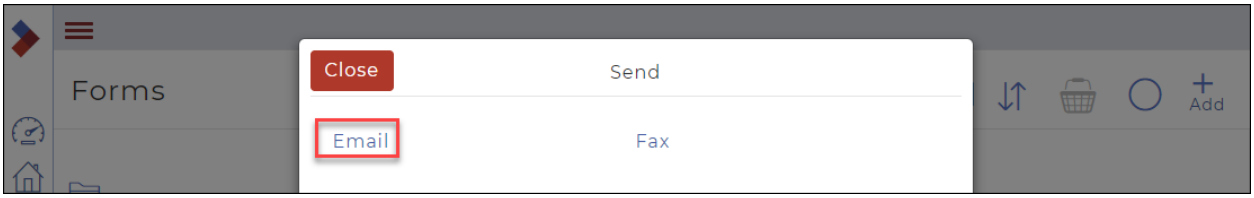
To email a single form from the forms folder:

1. Click **Forms** and locate the form you want to email in the **Forms** folder.

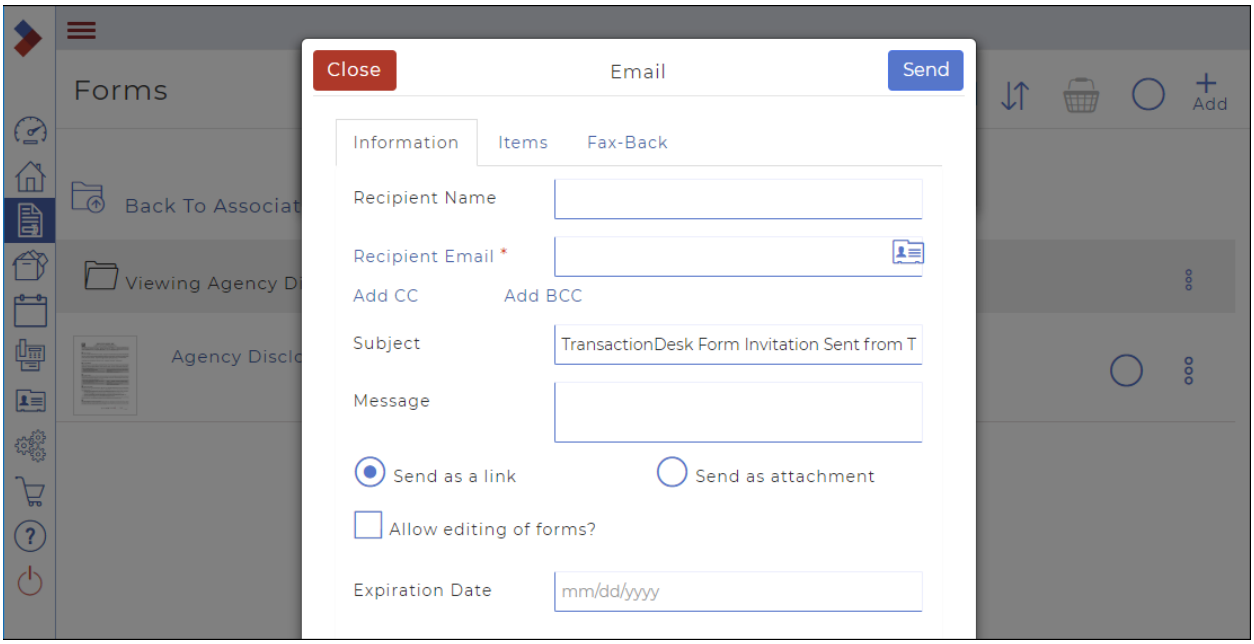
2. Click the **Ellipses Menu** ⋮ beside the form you want to email.
   A dialog box displays the possible actions.



3. Click **Send**.
   The **Send** dialog box displays.



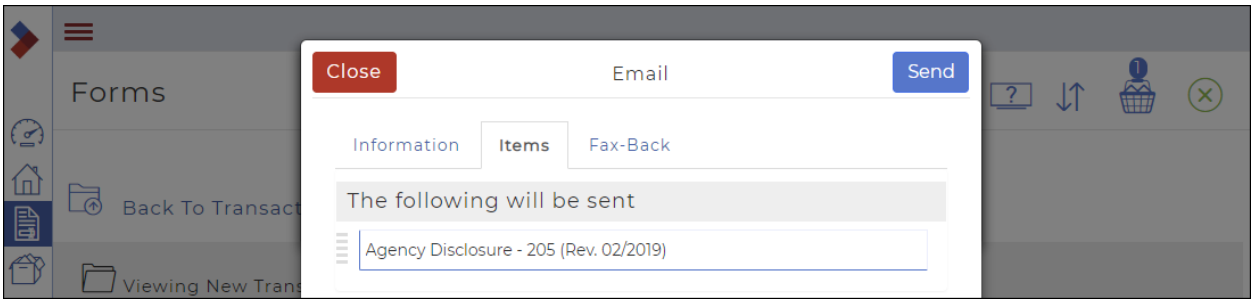
4. Click **Email**.
   The **Email** dialog box displays.



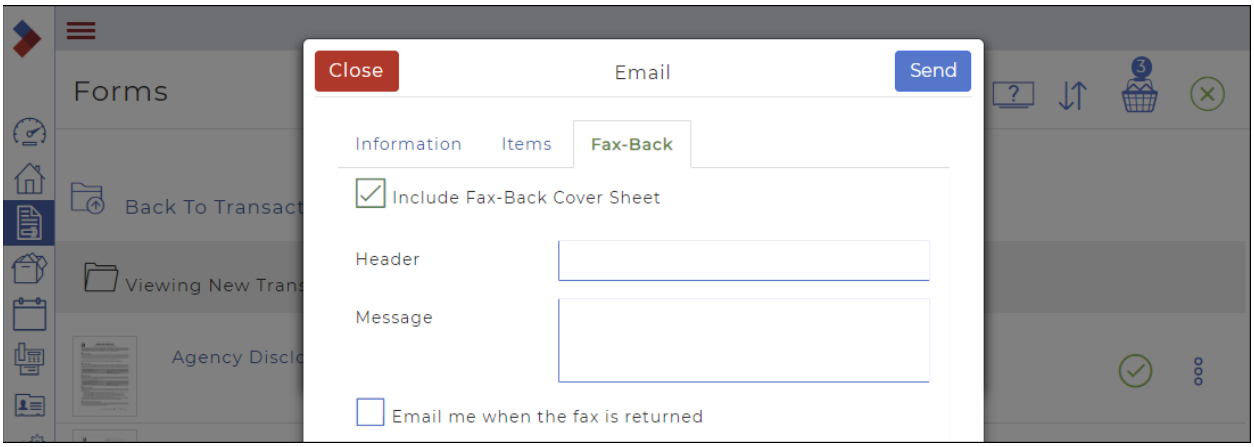
5. Use the Information tab fields to add information about the recipients, and the email subject line and message.

   Note: Required fields are indicated with an asterisk: in this dialog box, the only required field is **Recipient Email**.*

   - Optional: Add the **Recipient Name**
   - Required: Add the **Recipient Email**
   - Optional: Click **Add CC** to add a CC recipient to the email.
   - Optional: Click **Add BCC** to add a BCC recipient to the email.
   - Do one of the following:
     - Click **Send as a link** to include a hyperlink to the form in the body of the email.
     - Click **Send as attachment** to include the form as a .pdf file email attachment.
   - Optional: Check **Allow editing of forms** to allow the recipient to edit the form.
   - Optional: In the **Expiration Date** field, select a due date for the link to the form to expire. For example: If you have an addendum to a purchase agreement that must be signed within 6 days, you set the expiry date for six days in the future. After six days, the link to the form expires and no longer functions.
   - Optional: Use the **Items** tab to view the attached form.



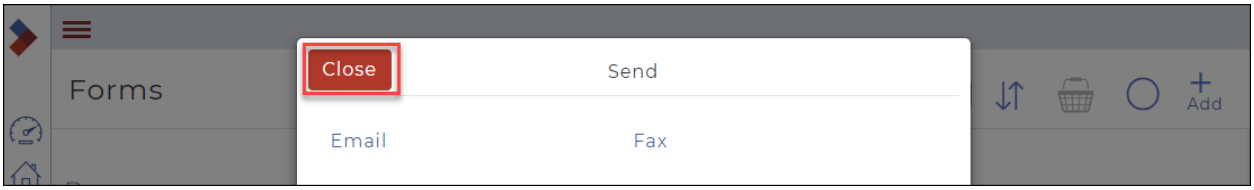
- Optional: If you need to include a fax back cover sheet with your email, use the **Fax-Back** tab and check **Include Fax-Back Cover Sheet**, and type a fax header and body message in the Header and Message fields.
- Optional: If you require a notification when the fax is completed, check **Email me when the fax is returned**.



6. When you are finished setting up your email, click **Send**.

   The email is sent to the intended recipient with the attached form.

7. Click **Close** to close the **Send** dialog box.



Emailing multiple forms from the forms folders

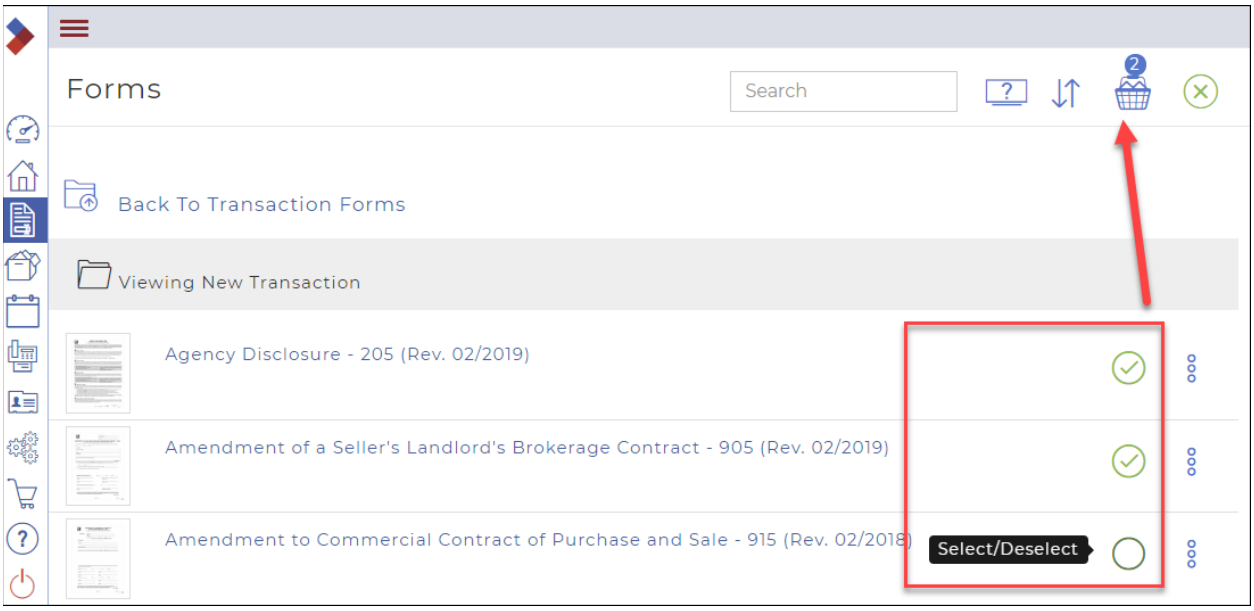
You can use the system to email multiple forms to a specific recipient from within the application. This functionality is convenient because it means that you do not have to download the form from the system, and then attach it to an email in your email client, and then send it to the recipient.

To email multiple forms from the forms folder:

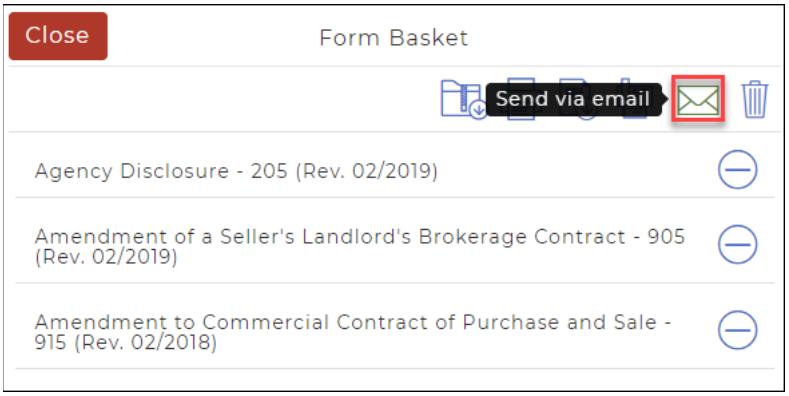
1. Click **Forms** and locate the forms you want to email in the **Forms** folder.

2. Click the **Select Circle** ○ beside the forms you want to email.

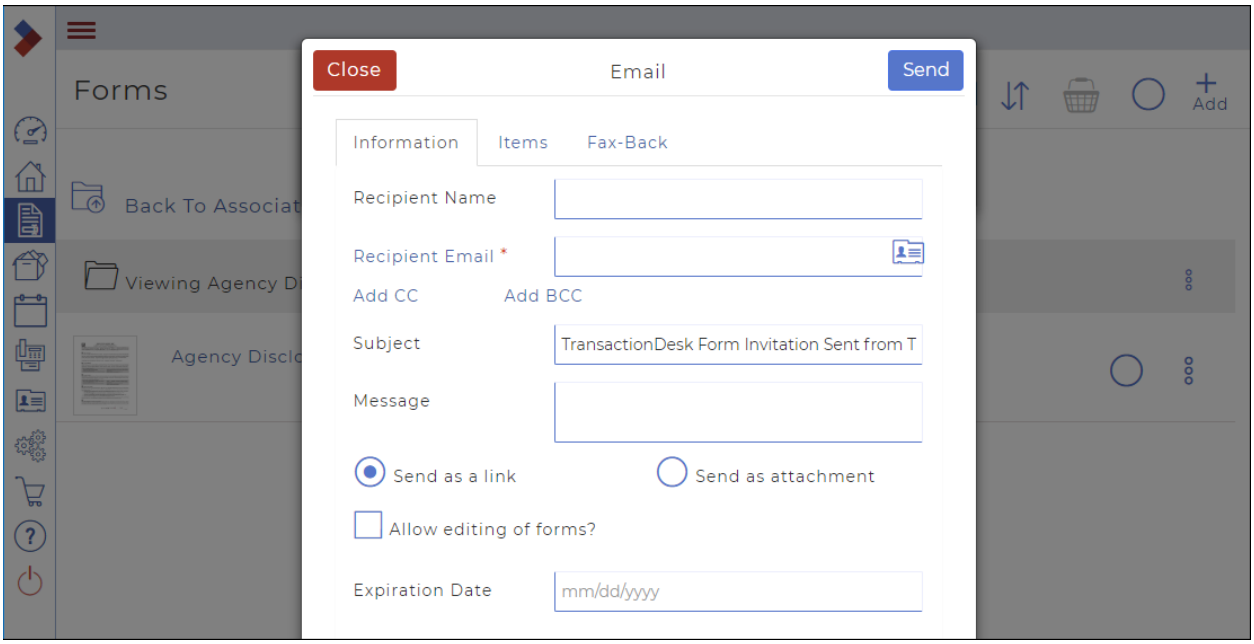
The forms are added to the **Basket** .



3. Click the **Basket** .
   The **Form Basket** dialog box displays.



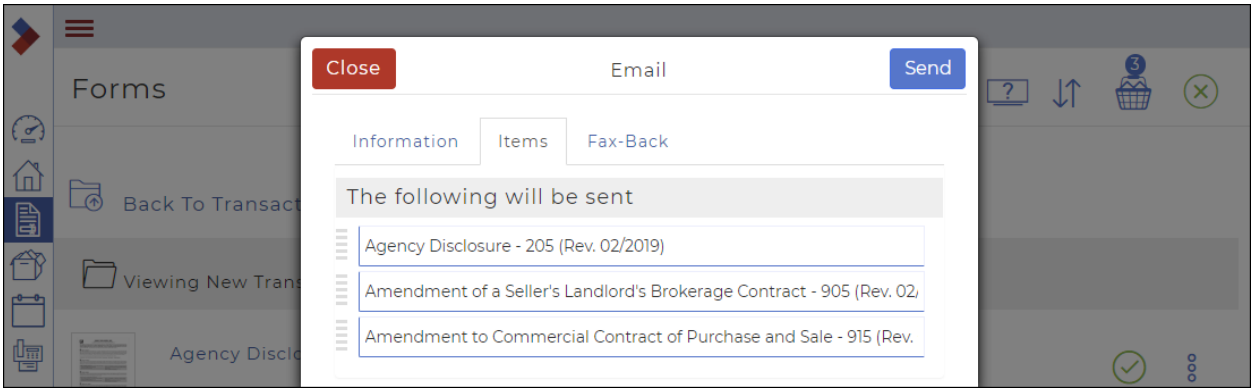
4. Click **Send via email** .
   The **Email** dialog box displays.



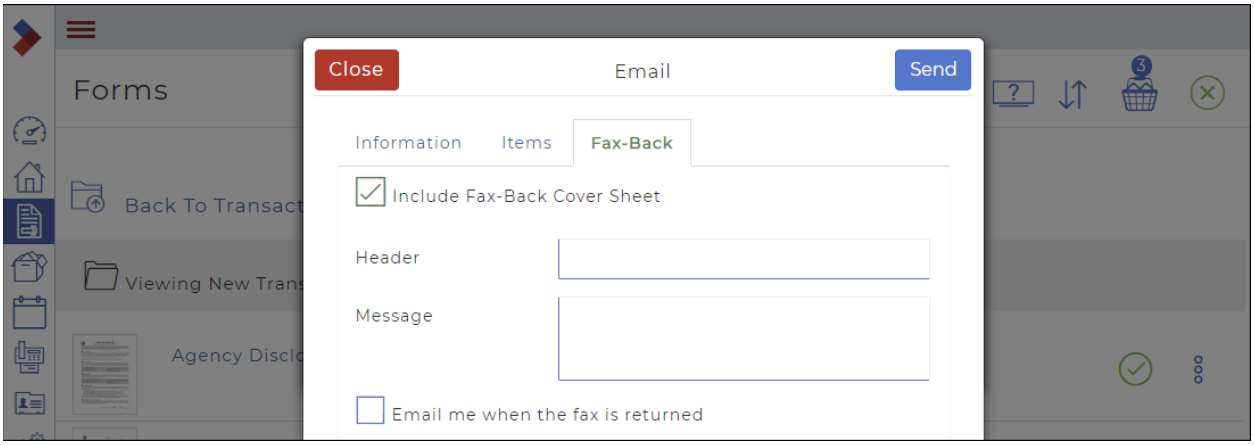
5. Use the Information tab fields to add information about the recipients, and the email subject line and message.

   Note: Note: Required fields are indicated with an asterisk: in this dialog box, the only required field is **Recipient Email**.*

   - Optional: Add the **Recipient Name**
   - Required: Add the **Recipient Email**
   - Optional: Click **Add CC** to add a CC recipient to the email.
   - Optional: Click **Add BCC** to add a BCC recipient to the email.
   - Do one of the following:
     - Click **Send as a link** to include a hyperlink to the form in the body of the email.
     - Click **Send as attachment** to include the form as a .pdf file email attachment.
   - Optional: Check **Allow editing of forms** to allow the recipient to edit the form.
   - Optional: In the **Expiration Date** field, select a due date for the link to the form to expire. For example: If you have an addendum to a purchase agreement that must be signed within 6 days, you set the expiry date for six days in the future. After six days, the link to the form expires and no longer functions.
   - Optional: Use the **Items** tab to view and arrange the order of the email attachments by dragging and dropping the forms.



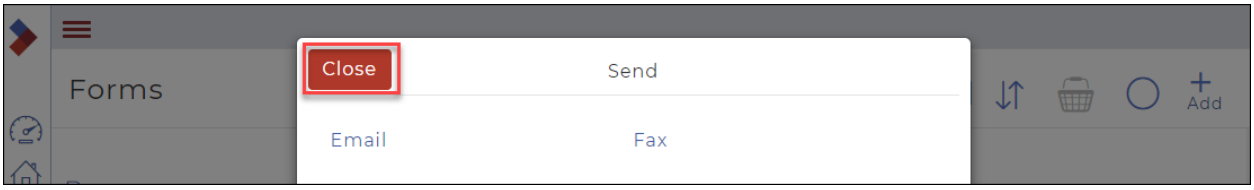
- Optional: If you need to include a fax back cover sheet with your email, use the **Fax-Back** tab and check **Include Fax-Back Cover Sheet**, and type a fax header and body message in the Header and Message fields.
- Optional: If you require a notification when the fax is completed, check **Email me when the fax is returned**.



6. When you are finished setting up your email, click **Send**.

   The email is sent to the intended recipient with all of the attached forms.

7. Click **Close** to close the **Send** dialog box.



Emailing a form from a transaction

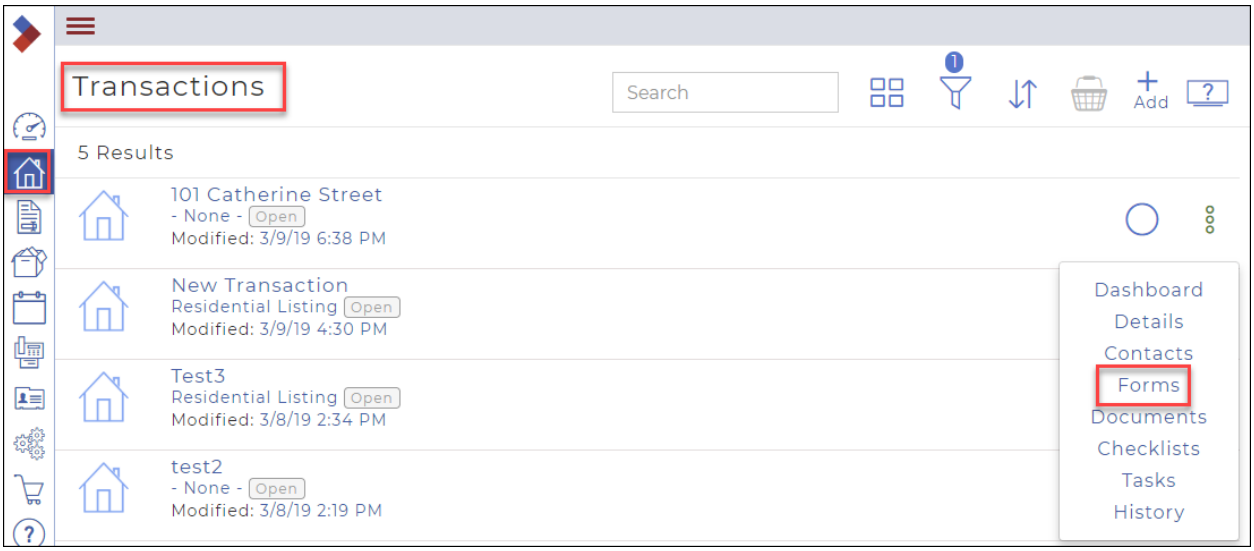
You can send a form that is attached to a transaction via email.

CLICK TO VIEW VIDEO

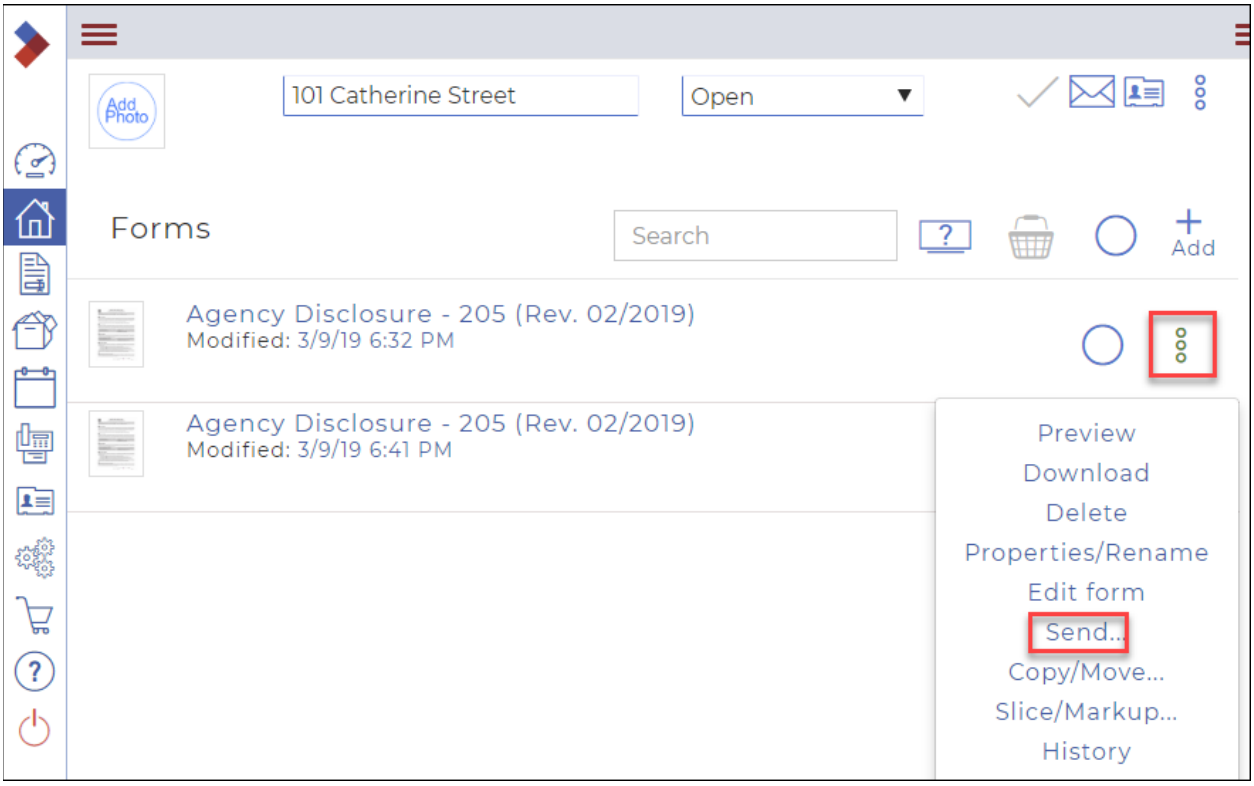
To email a form from a transaction:

1. Click **Transactions.** and locate the transaction that includes the form you want to email.

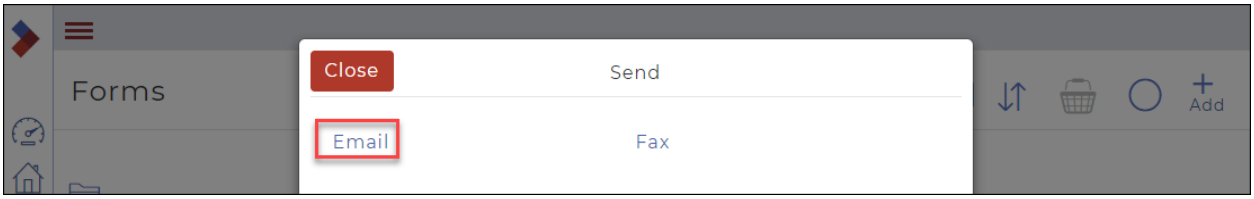
2. Click the **Ellipses Menu** beside the transaction.
   A dialog box displays the possible actions.



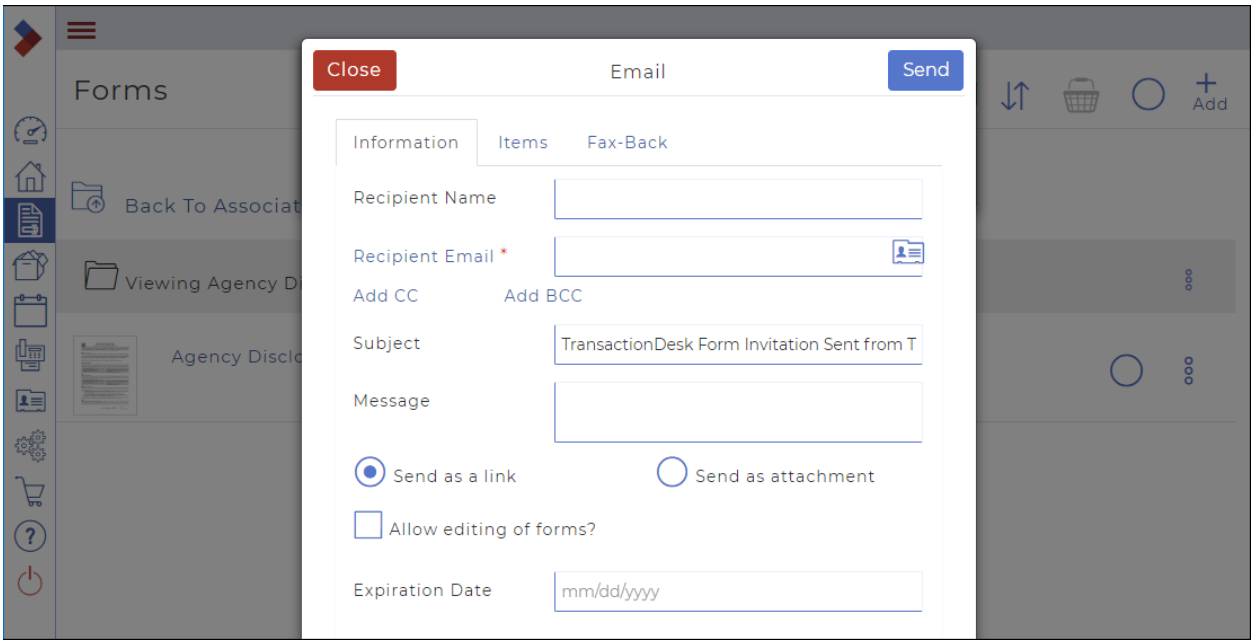
3. Click **Forms.**
   A list of forms attached to the transaction displays.



4. Click the **Ellipses Menu** and select **Send**.
   The **Send** dialog box displays.



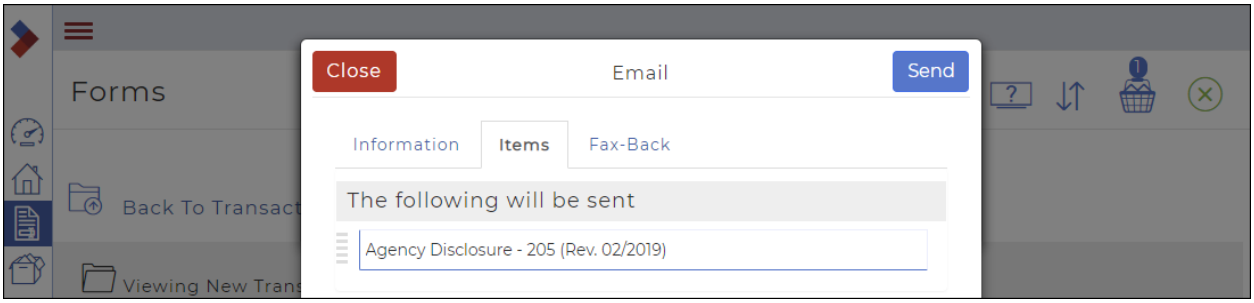
5. Click **Email**.
   The **Email** dialog box displays.



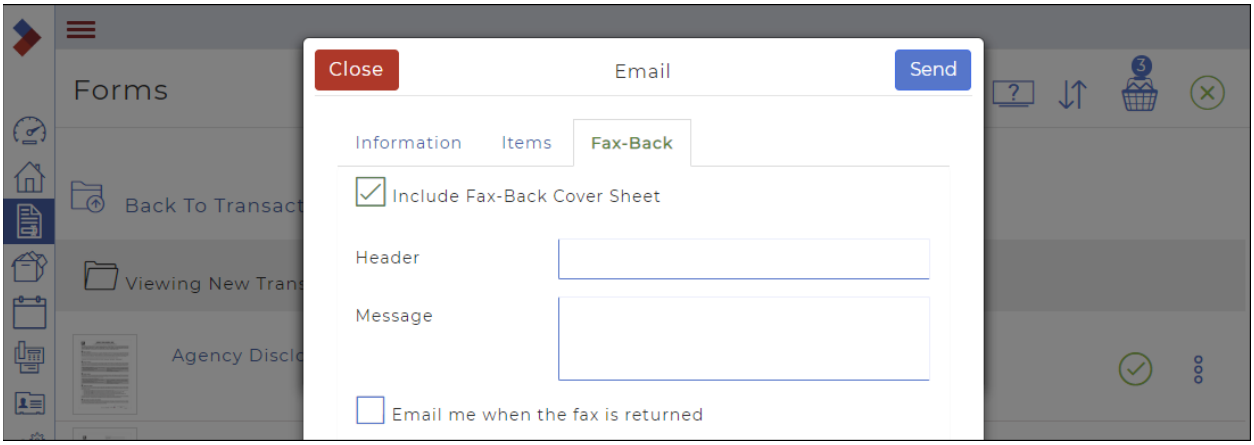
6. Use the Information tab fields to add information about the recipients, and the email subject line and message.

   Note: Required fields are indicated with an asterisk: in this dialog box, the only required field is **Recipient Email**.*

   - Optional: Add the **Recipient Name**
   - Required: Add the **Recipient Email**
   - Optional: Click **Add CC** to add a CC recipient to the email.
   - Optional: Click **Add BCC** to add a BCC recipient to the email.
   - Do one of the following:
     - Click **Send as a link** to include a hyperlink to the form in the body of the email.
     - Click **Send as attachment** to include the form as a .pdf file email attachment.
   - Optional: Check **Allow editing of forms** to allow the recipient to edit the form.
   - Optional: In the **Expiration Date** field, select a due date for the link to the form to expire. For example: If you have an addendum to a purchase agreement that must be signed within 6 days, you set the expiry date for six days in the future. After six days, the link to the form expires and no longer functions.
   - Optional: Use the **Items** tab to view the attached form.



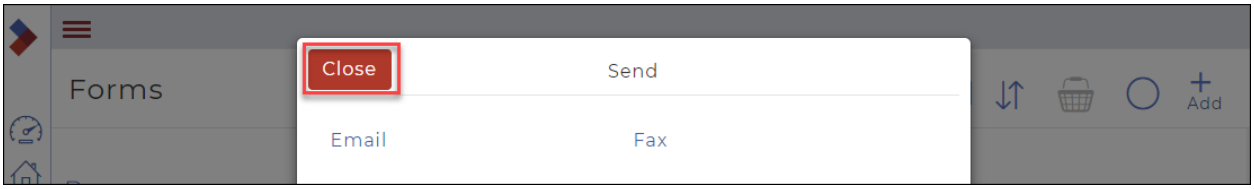
- Optional: If you need to include a fax back cover sheet with your email, use the **Fax-Back** tab and check **Include Fax-Back Cover Sheet**, and type a fax header and body message in the Header and Message fields.
- Optional: If you require a notification when the fax is completed, check **Email me when the fax is returned**.



7. When you are finished setting up your email, click **Send**.

   The email is sent to the intended recipient with the attached form.

8. Click **Close** to close the **Send** dialog box.



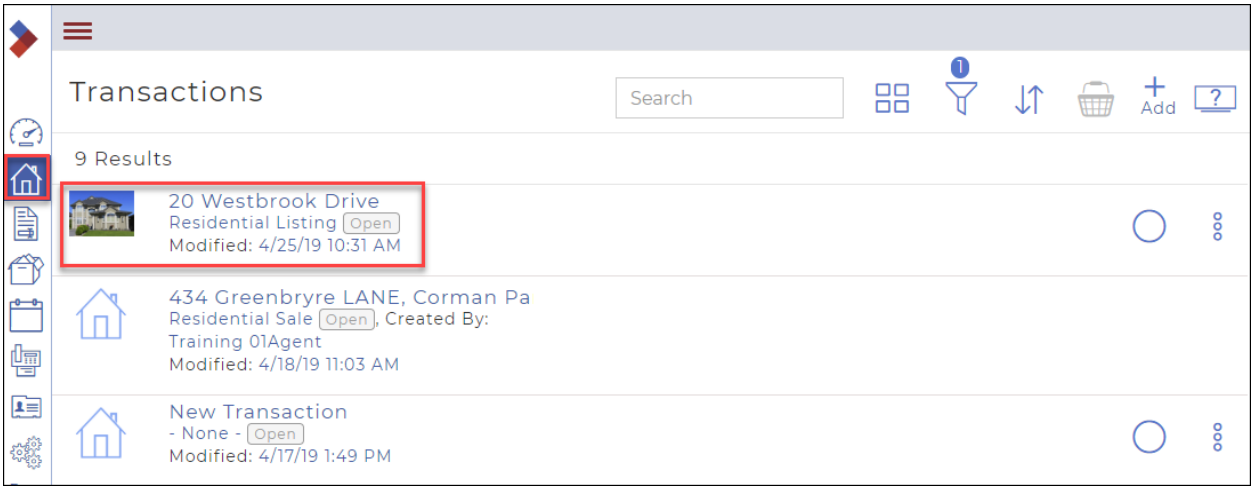
Emailing multiple forms from a transaction

You can send forms that are attached to a transaction via email.

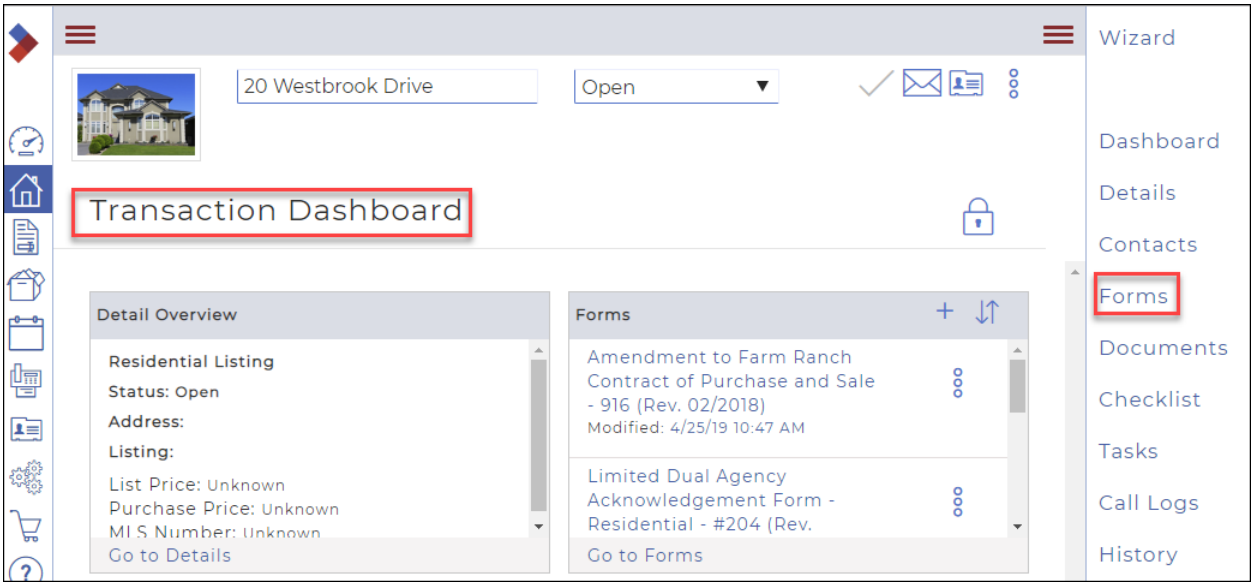
CLICK TO VIEW VIDEO

To email multiple forms from a transaction:

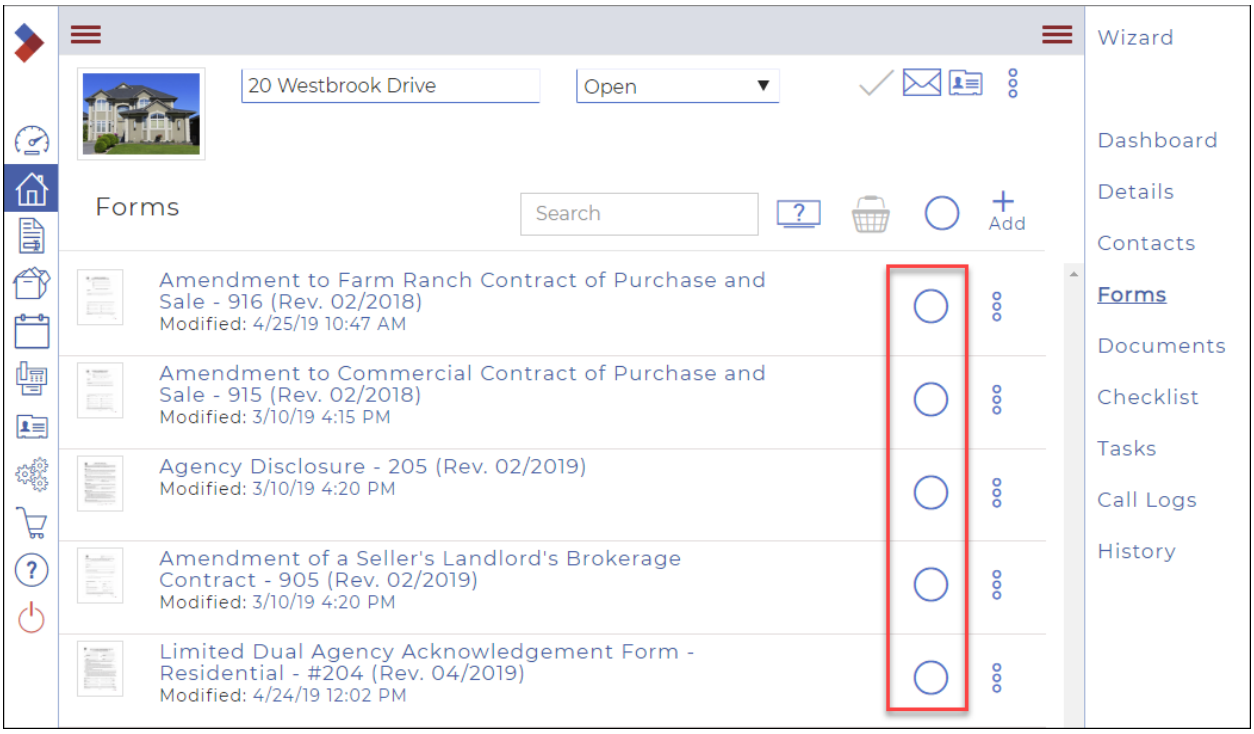
1. In the left sidebar, click **Transactions** .
   The **Transactions** list displays.



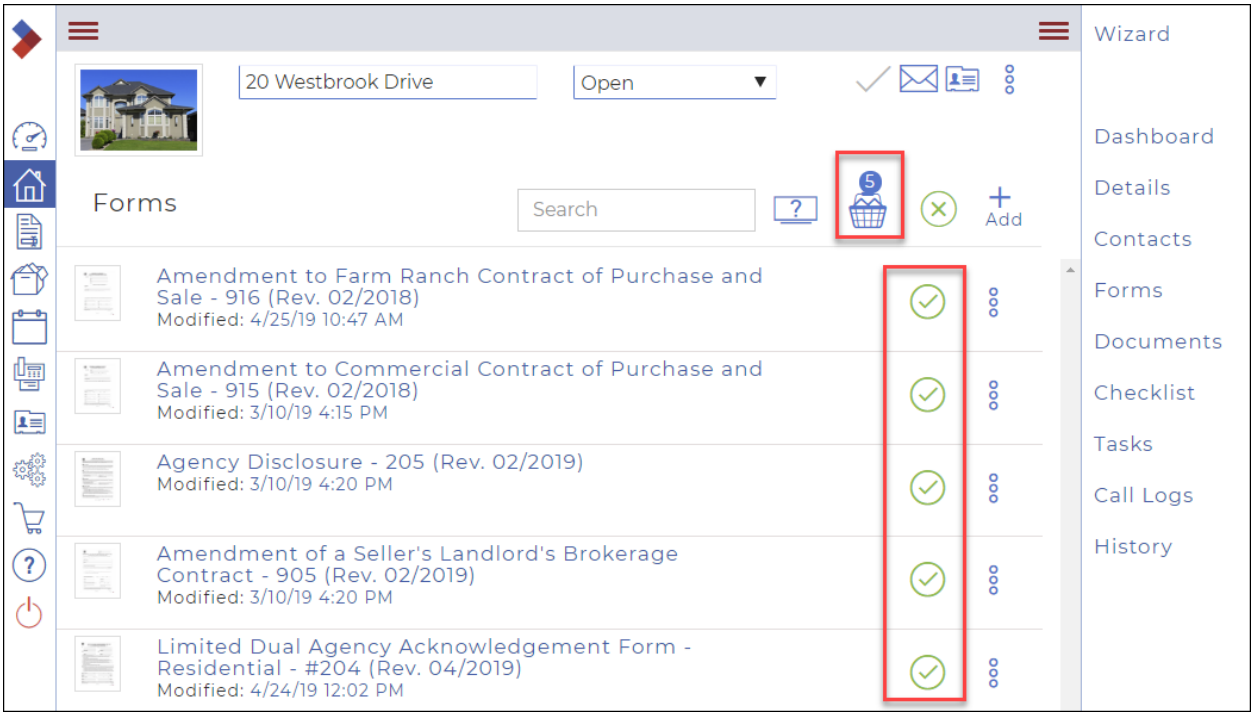
2. Click the name of the transaction that includes the forms you want to email.
   The **Transaction Dashboard** displays.



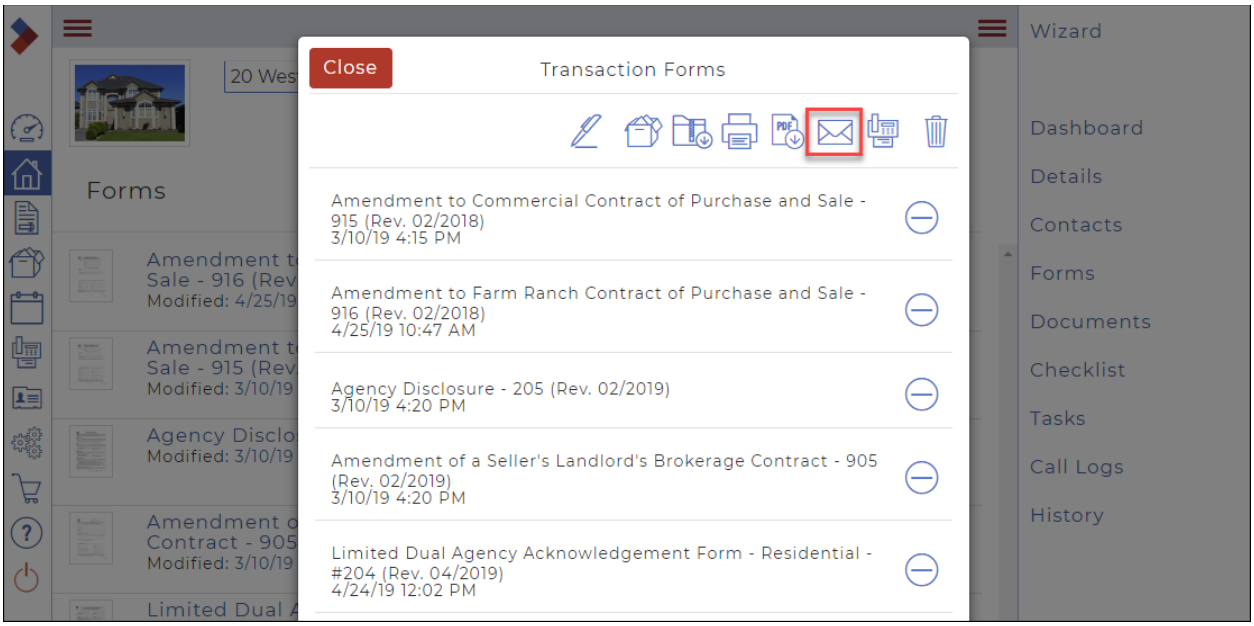
3. In the right sidebar, click **Forms**.
   The **Forms** window for that transaction displays.



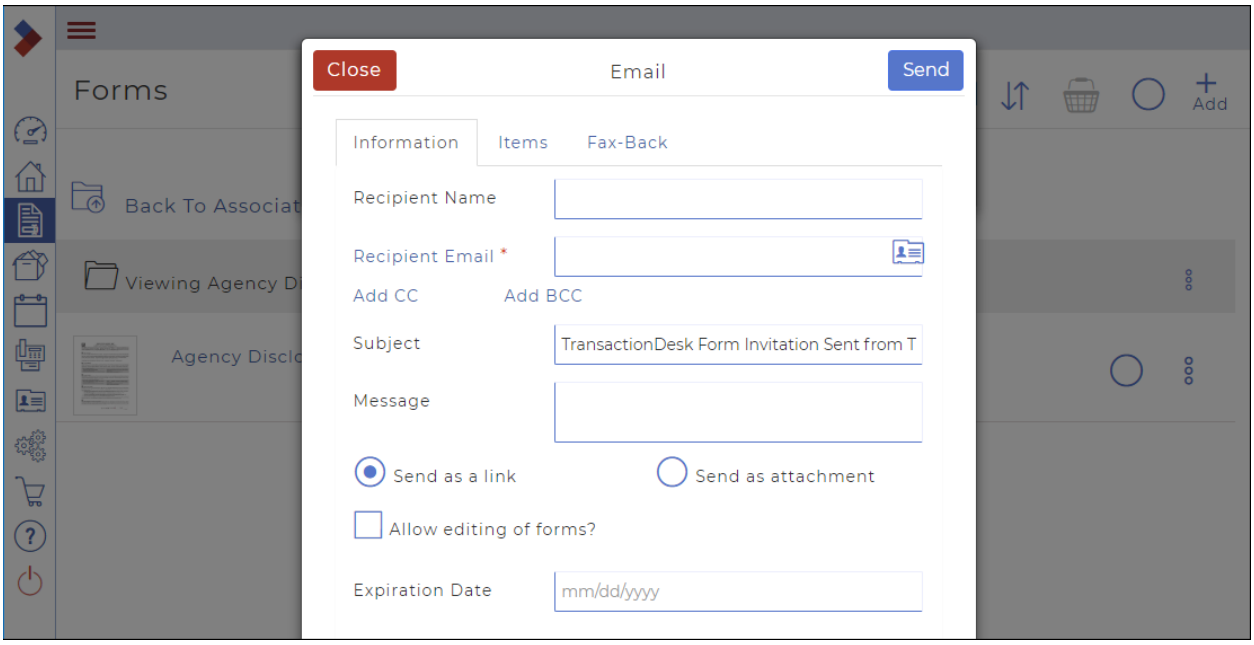
4. Click in the select circle ○ to select the forms you wish to email.
   The forms are added to the basket.



5. Click the **Basket** .
   The **Transaction Forms** dialog box displays the forms you selected.



6. Click **Send via email** ✉.
   The **Email** dialog box displays.

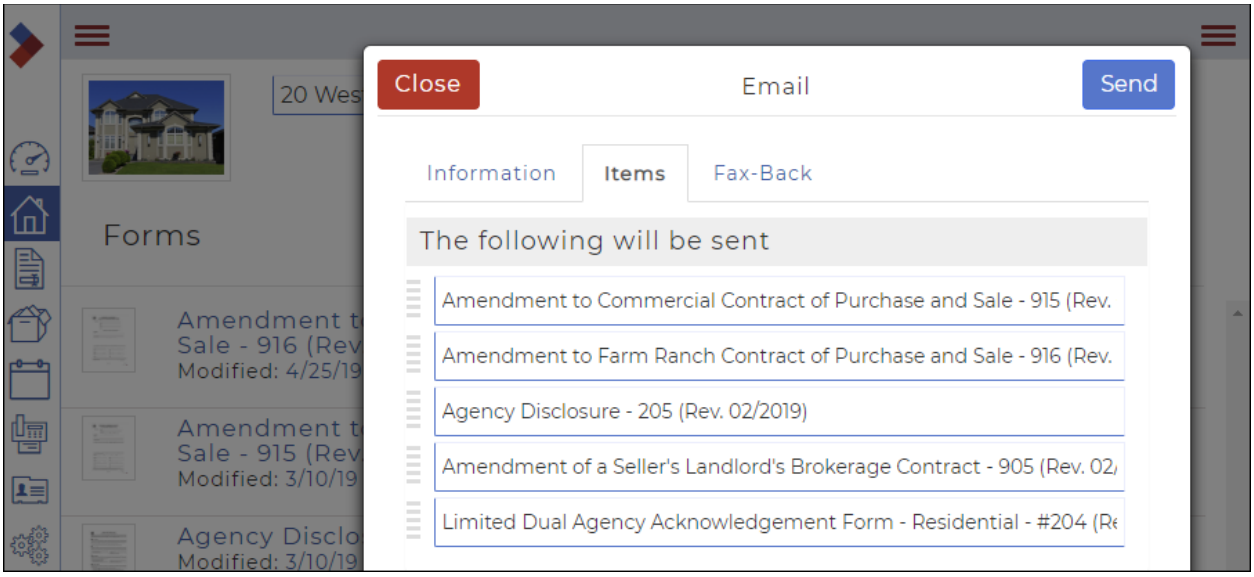


7. Use the Information tab fields to add information about the recipients, and the email subject line and message.

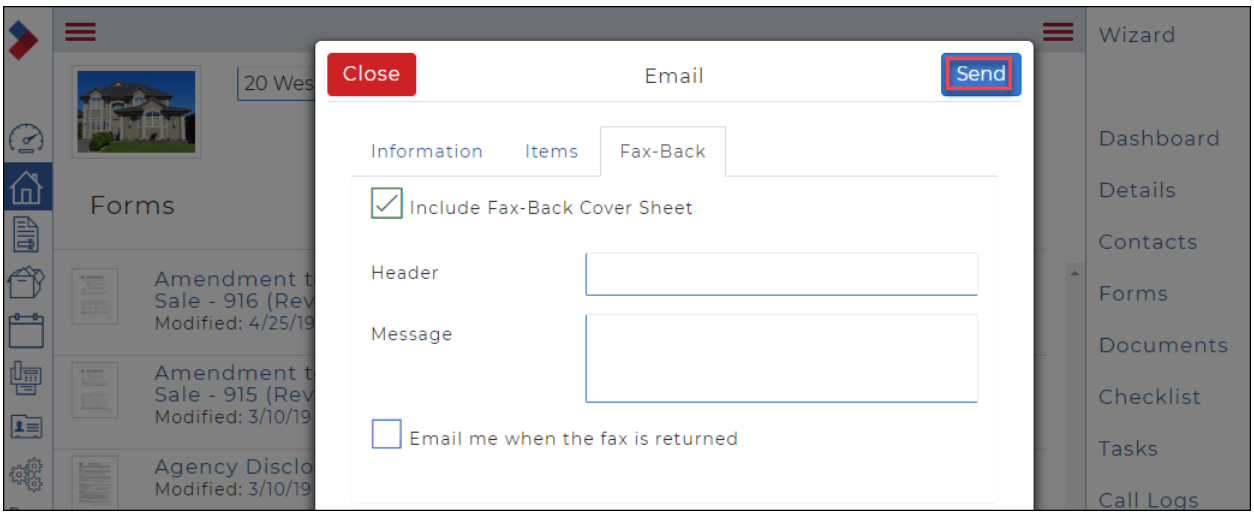
   Note: Required fields are indicated with an asterisk: in this dialog box, the only required field is **Recipient Email**.*

   - Optional: Add the **Recipient Name**
   - Required: Add the **Recipient Email**
   - Optional: Click **Add CC** to add a CC recipient to the email.
   - Optional: Click **Add BCC** to add a BCC recipient to the email.

- Do one of the following:
    - Click **Send as a link** to include a hyperlink to the form in the body of the email.
    - Click **Send as attachment** to include the form as a .pdf file email attachment.
- Optional: Check **Allow editing of forms** to allow the recipient to edit the form.
- Optional: In the **Expiration Date** field, select a due date for the link to the form to expire. For example: If you have an addendum to a purchase agreement that must be signed within 6 days, you set the expiry date for six days in the future. After six days, the link to the form expires and no longer functions.
- Optional: Use the **Items** tab to view the attached form.



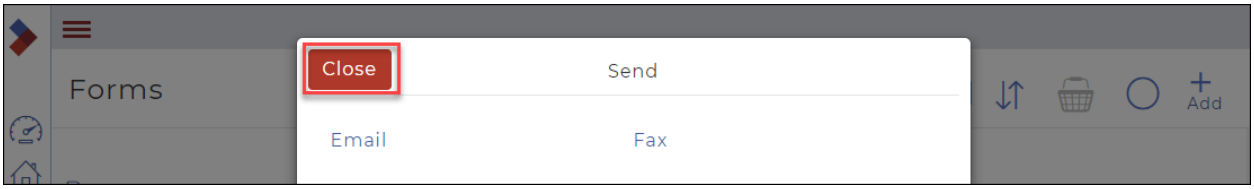
- Optional: If you need to include a fax back cover sheet with your email, use the **Fax-Back** tab and check **Include Fax-Back Cover Sheet**, and type a fax header and body message in the Header and Message fields.
- Optional: If you require a notification when the fax is completed, check **Email me when the fax is returned**.



8. When you are finished setting up your email, click **Send**.

The email is sent to the intended recipient with the attached forms.

9. Click **Close** to close the **Send** dialog box.



Faxing a form from the forms folders

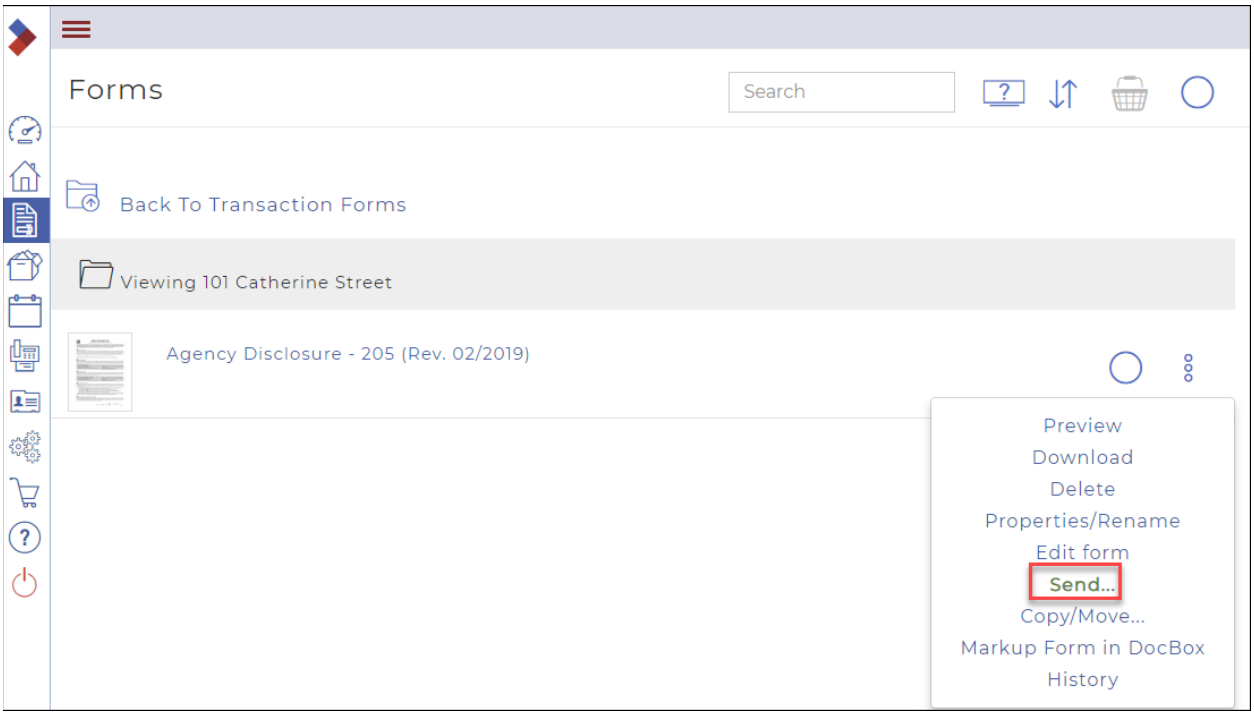
You can use the system to fax a form to a specific recipient. For example, if you are working with an outside broker on the other side of town that only receives deal forms via fax, you can fax them the required forms for them to sign and send back.

CLICK TO VIEW VIDEO

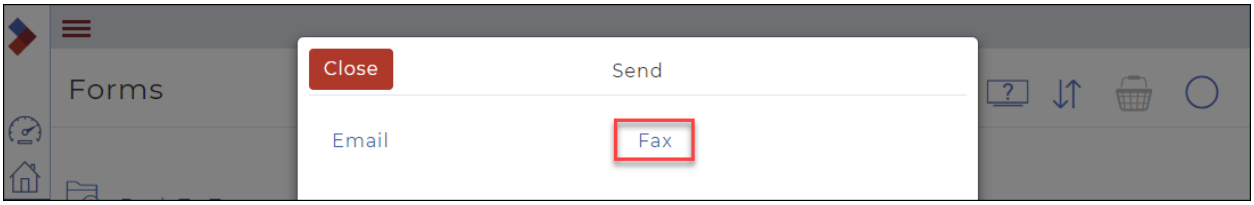
To fax a form from the forms folder:

1. Click **Forms** and locate the form you want to email in the **Transaction Forms** folder.

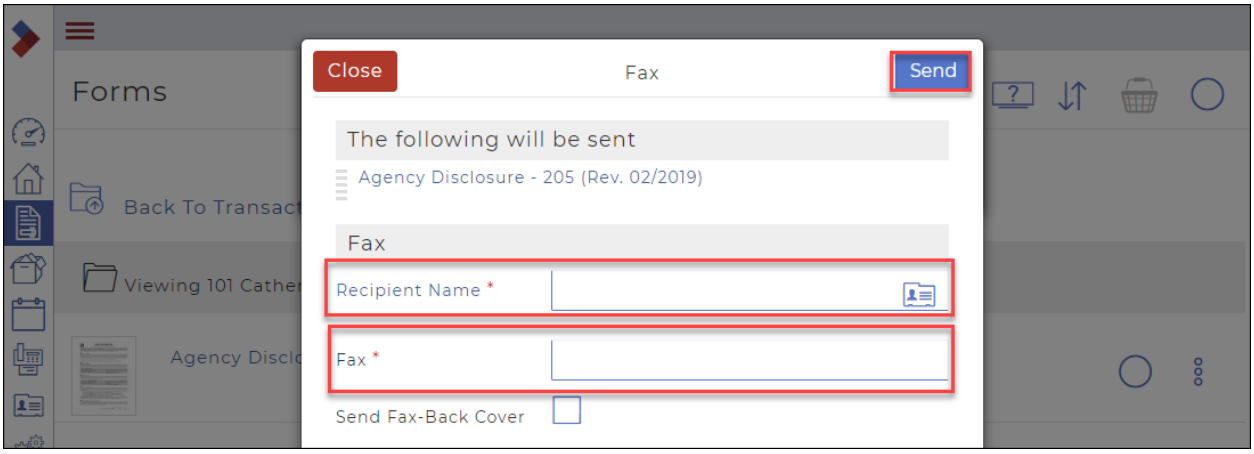
2. Click the **Ellipses Menu** beside the form you want to fax.
   A dialog box displays the possible actions.



3. Click **Send**.
   The **Send** dialog box displays.



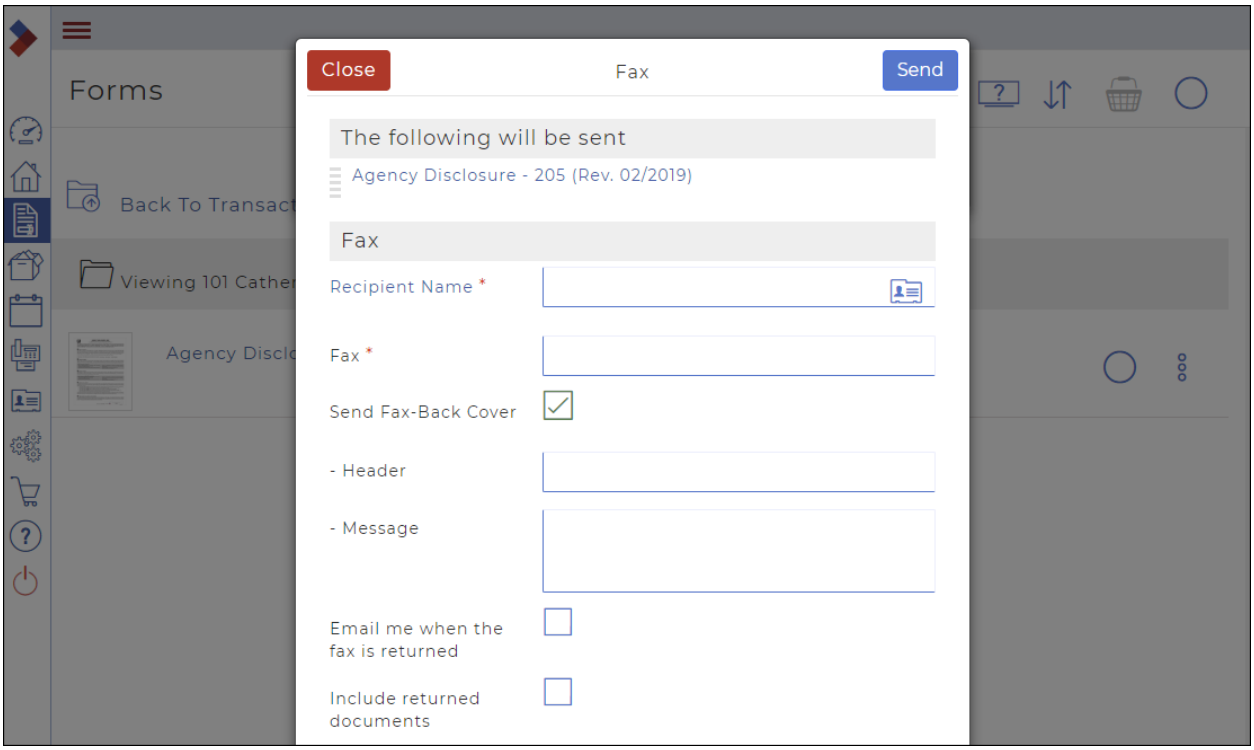
4. Click **Fax**.
   The **Fax** dialog box displays.



5. Add the required information.

   Note: Required fields are indicated with an asterisk.*

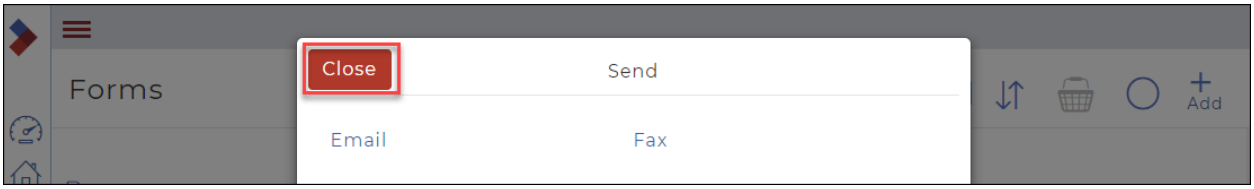
- Required: Enter the name of the fax recipient in the **Recipient Name** field
- Required: Enter the fax number in the **Fax** field.
- Optional: If you need to include a fax back cover sheet, check **Include Fax-Back Cover Sheet**, and enter a fax header and body message in the Header and Message fields.
- Optional: Check **Email me** when the fax is returned if you require a notification when the fax is completed.
- Optional: Check **Include returned documents** if you need to include copies of any returned forms in the returned fax notification email.



6. When you are finished adding your fax information, click **Send**.

   The fax is sent to the intended recipient with the attached form.

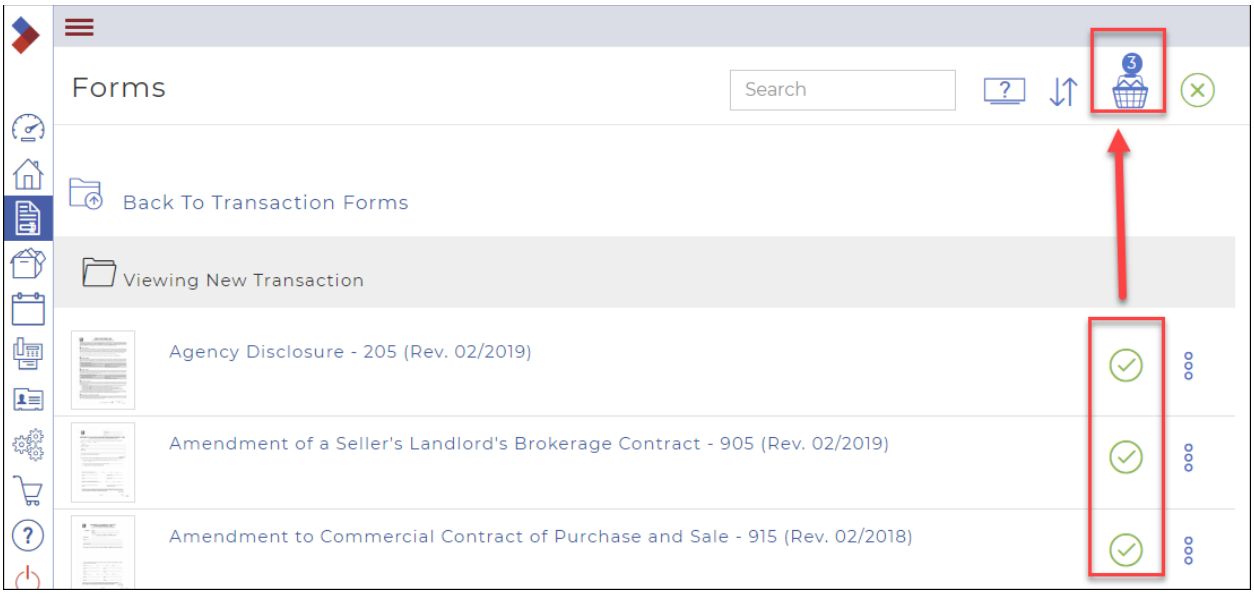
7. Click **Close** to close the **Send** dialog box.



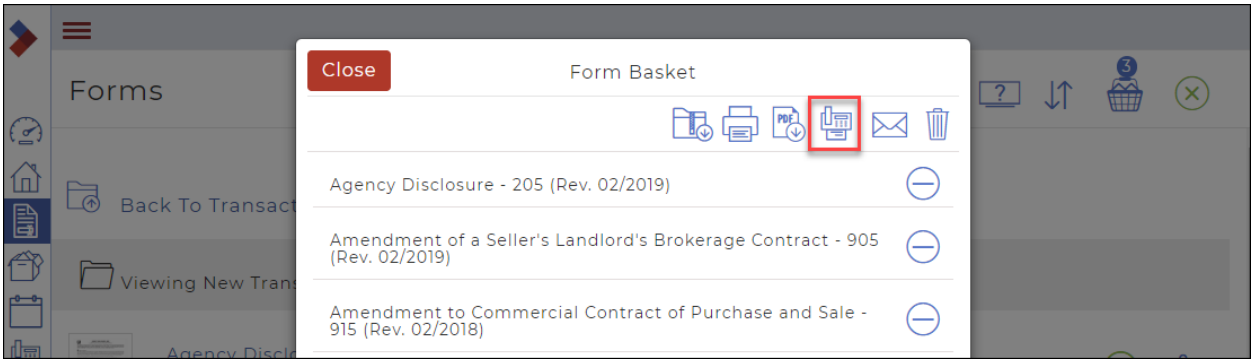
Faxing multiple forms from the forms folder

To fax multiple forms from the forms folder:

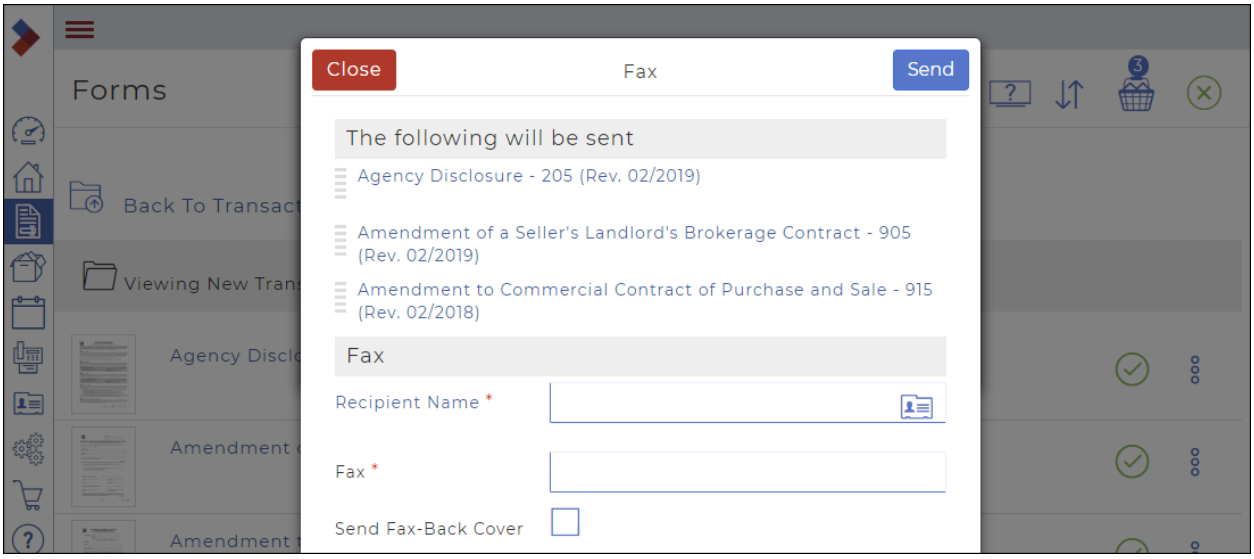
1. Click **Forms** and locate the forms you want to email in the **Transaction Forms** folder.



2. Select the forms you want to fax.
   They will be added to the basket.
3. Click the **Basket** .
   The **Form Basket** dialog box will display.



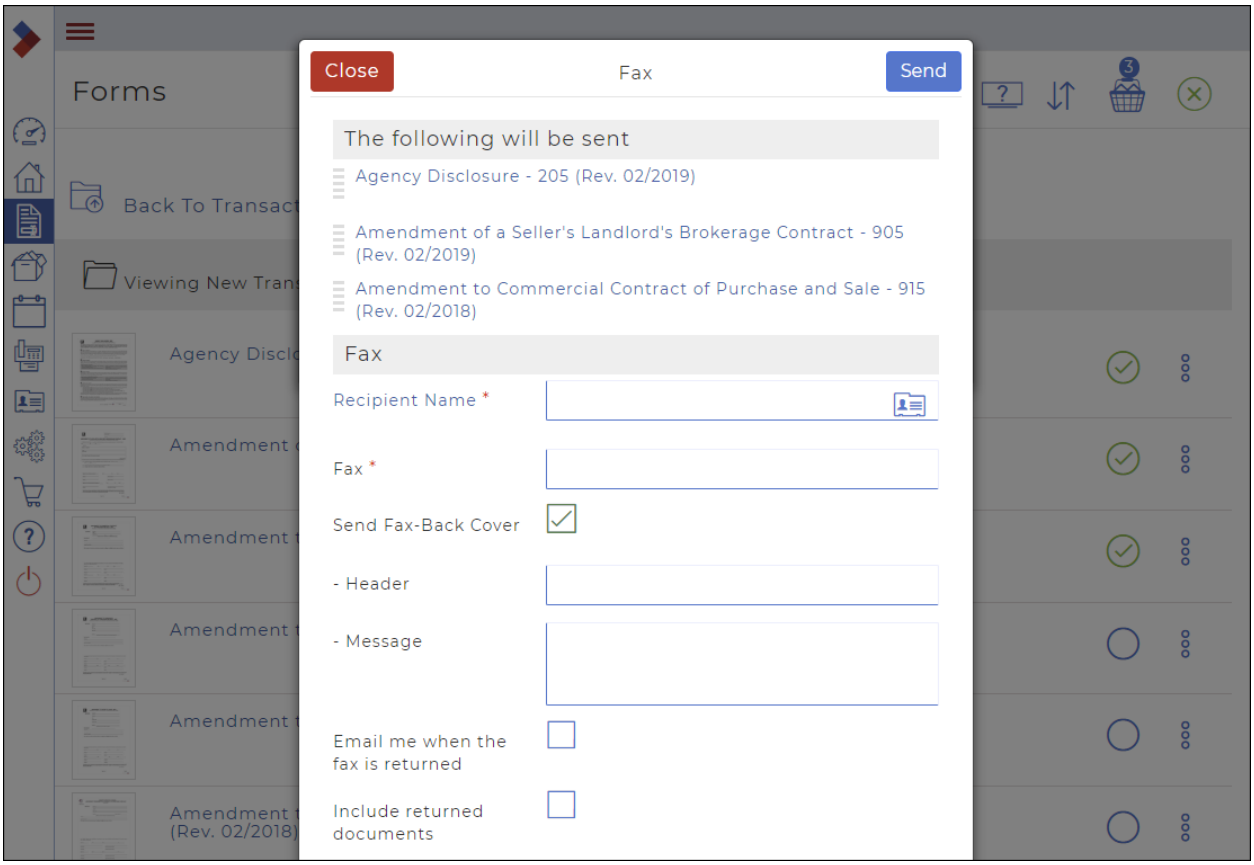
4. Click **Fax** .
   The **Fax** dialog box displays.



5. Add the required information.

   Note: Required fields are indicated by an asterisk.*

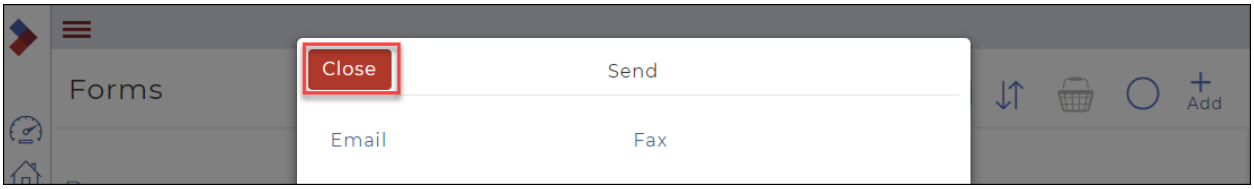
   - Required: Enter the name of the fax recipient in the **Recipient Name** field
   - Required: Enter the fax number in the **Fax** field.
   - Optional: If you need to include a fax back cover sheet, check **Include Fax-Back Cover Sheet**, and enter a fax header and body message in the Header and Message fields.
   - Optional: Check **Email me** when the fax is returned if you require a notification when the fax is completed.
   - Optional: Check **Include returned documents** if you need to include copies of any returned forms in the returned fax notification email.



6. When you are finished adding your fax information, click **Send**.

   The fax is sent to the intended recipient with the attached forms.

7. Click **Close** to close the **Send** dialog box.



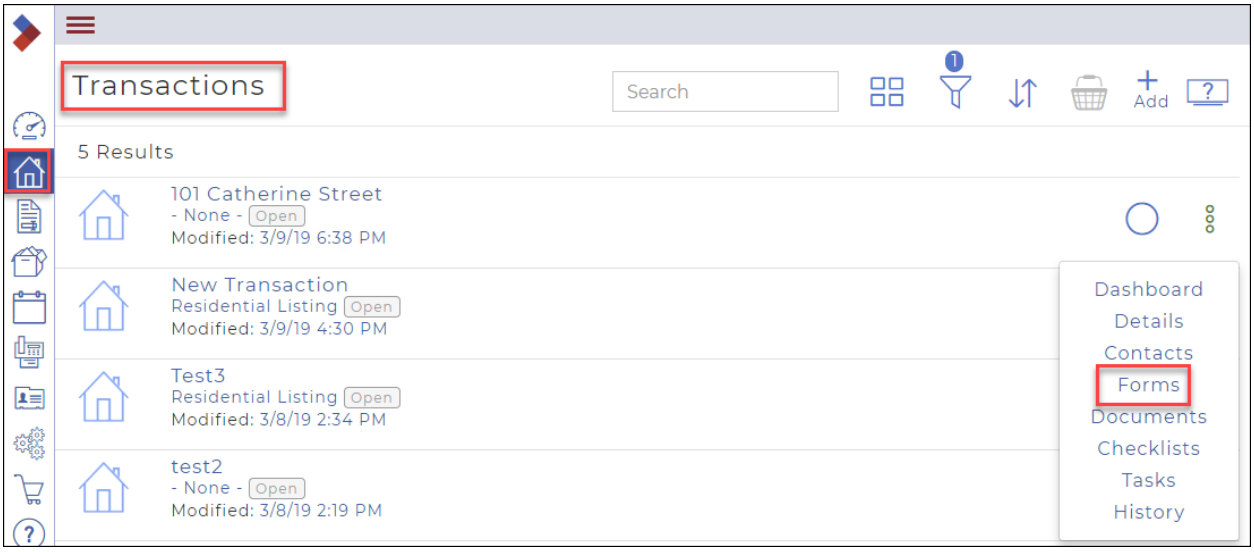
Faxing a form from a transaction

You can send a form that is attached to a transaction via fax.

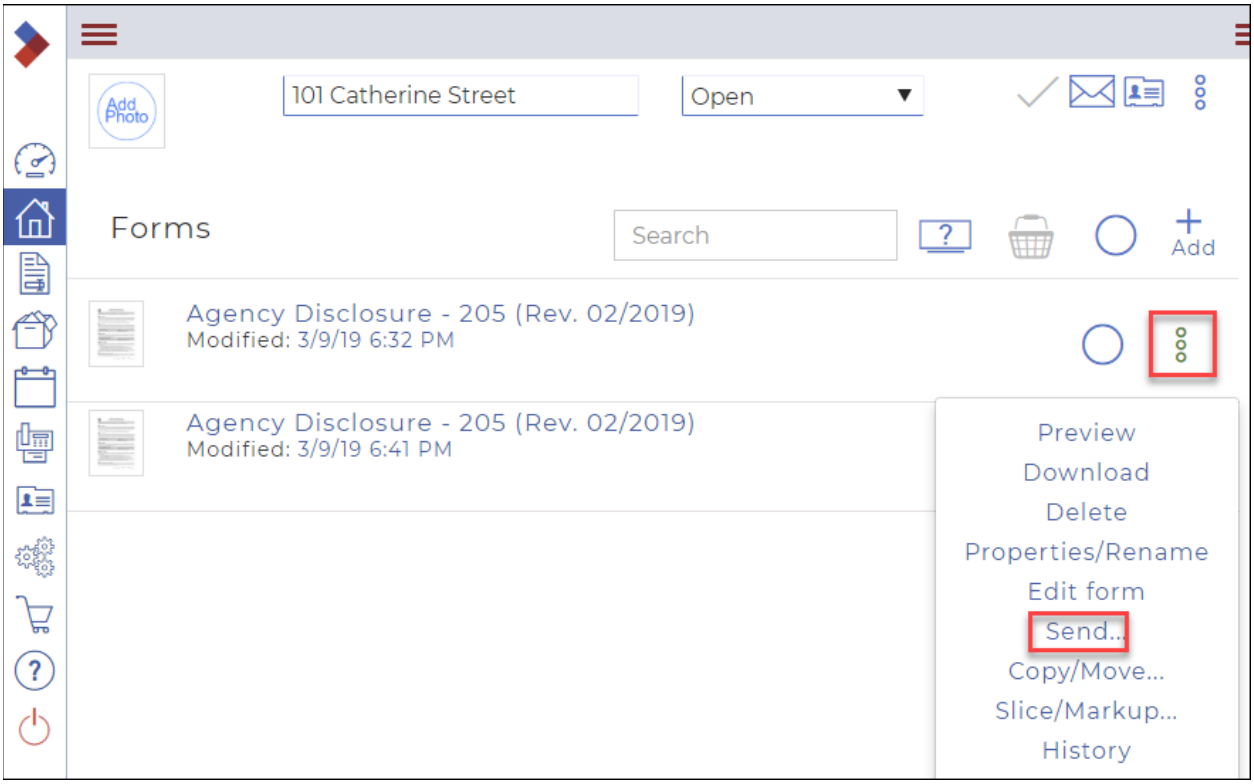
CLICK TO VIEW VIDEO

To fax a form from a transaction:

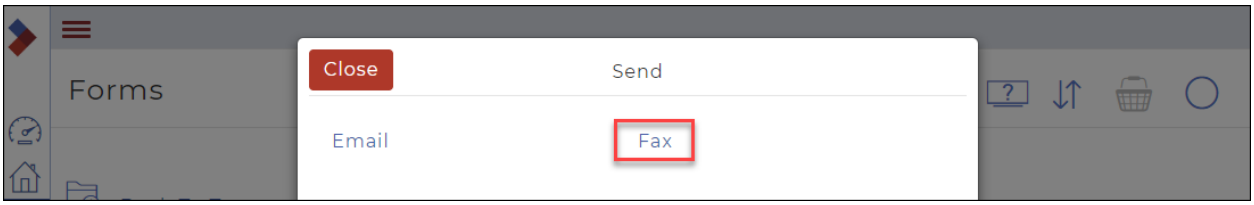
1. Click **Transactions.** and locate the transaction that includes the form you want to email.
2. Click the **Ellipses Menu** beside the transaction.
   A dialog box displays the possible actions.



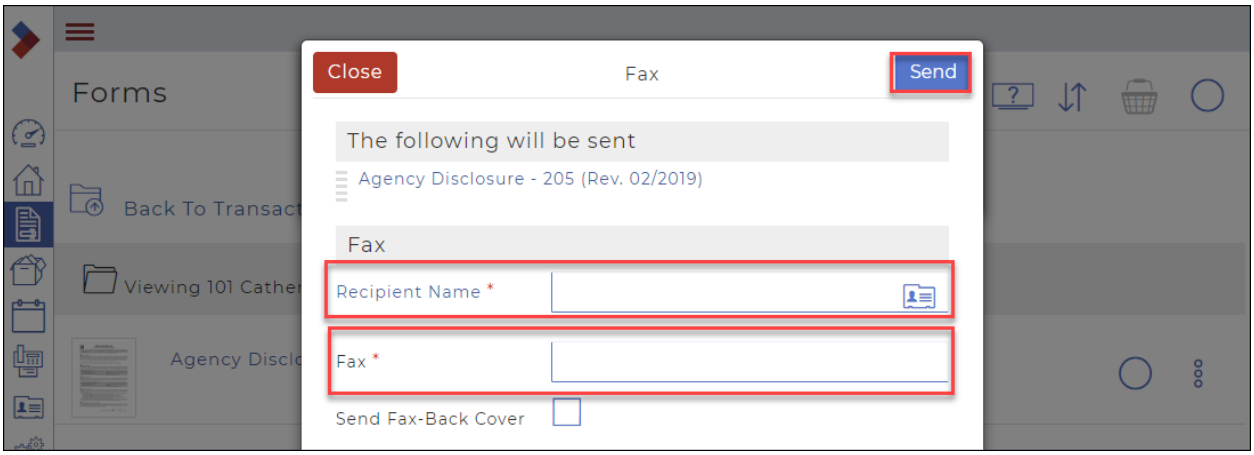
3. Click **Forms.**
   A list of forms attached to the transaction displays.



4. Click the **Ellipses Menu** ⋮ and select **Send**.
   The **Send** dialog box displays.



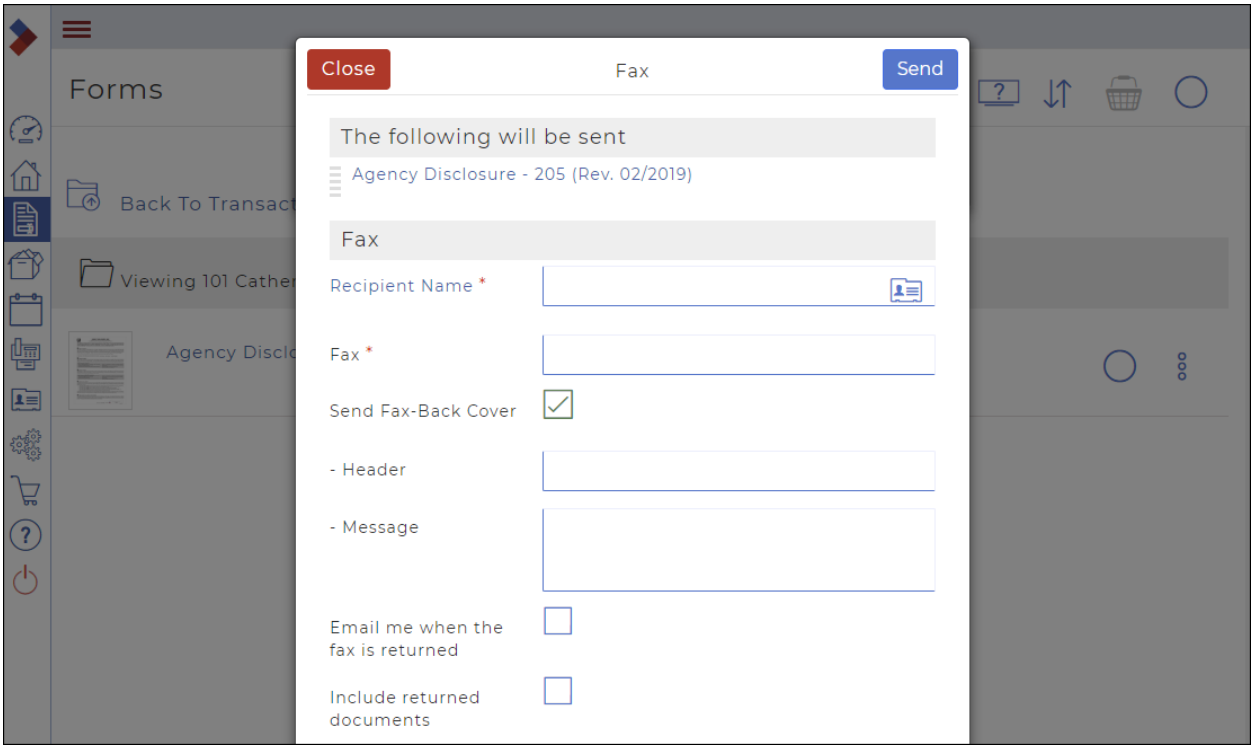
5. Click **Fax**.
   The **Fax** dialog box displays.



6. Add the required information.

   Note: Required fields are indicated with an asterisk.*

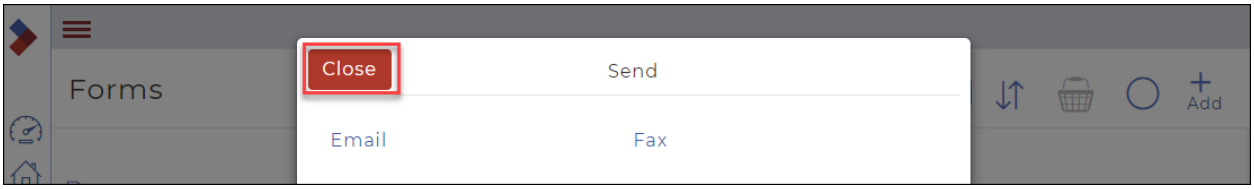
   - Required: Enter the name of the fax recipient in the **Recipient Name** field
   - Required: Enter the fax number in the **Fax** field.
   - Optional: If you need to include a fax back cover sheet, check Include **Fax-Back Cover Sheet**, and enter a fax header and body message in the Header and Message fields.
   - Optional: Check **Email me** when the fax is returned if you require a notification when the fax is completed.
   - Optional: Check **Include returned documents** if you need to include copies of any returned forms in the returned fax notification email.



7. When you are finished adding your fax information, click **Send**.

   The fax is sent to the intended recipient with the attached form.

8. Click **Close** to close the **Send** dialog box.



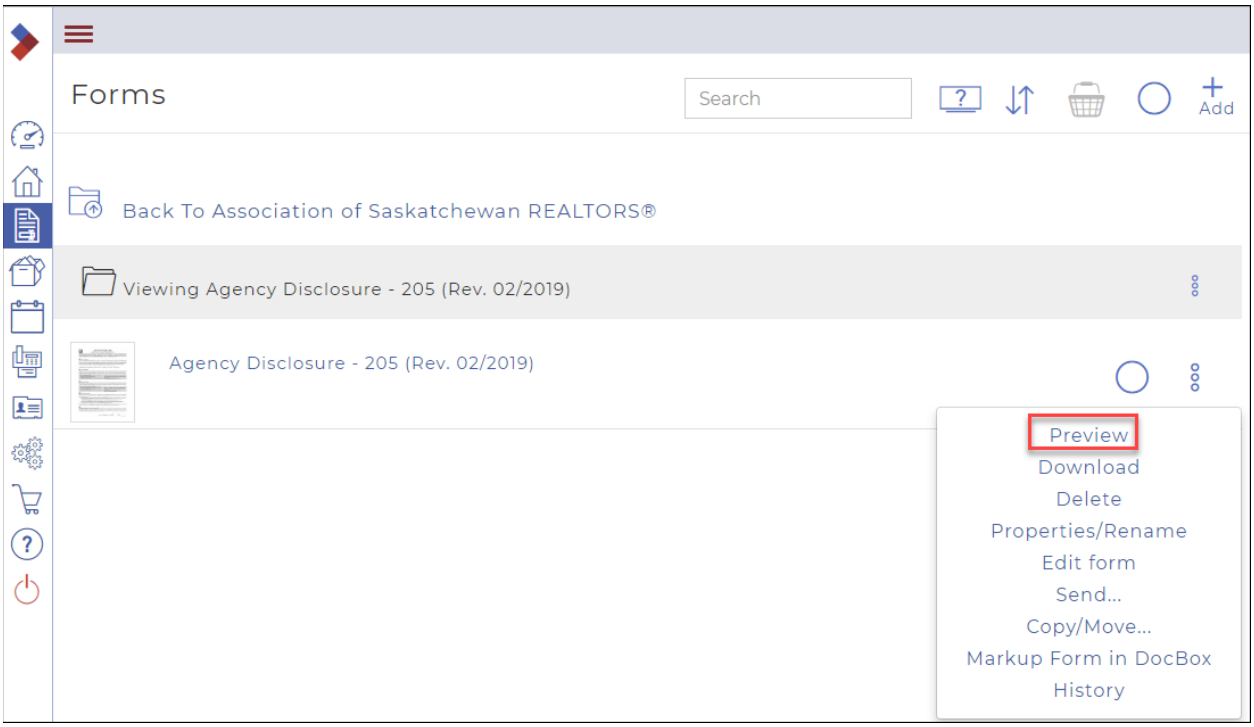
Printing a form from the forms folder

Print a form when you need to work with a hard copy of the form. For example: If you are working with an outside broker on the other side of town that is not working in a paperless office, you can print the required forms for them to sign and send back.

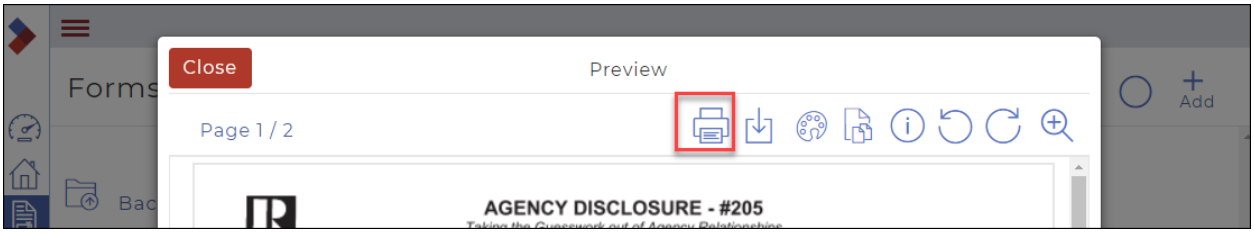
To print a form from the forms folder:

1. Click **Forms** and locate the form you need to print in the **Forms** folder.

   Caution: Ensure that you select a form, not a form template (unless you had wanted to print the template).

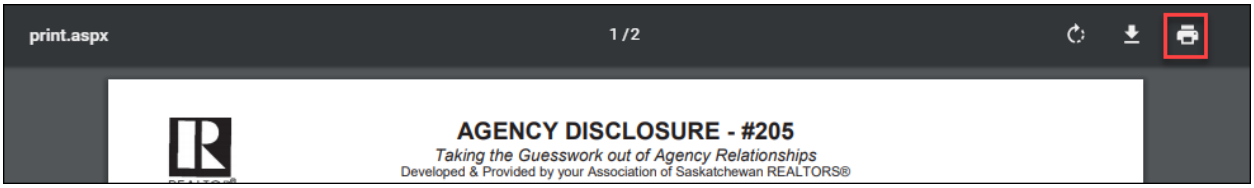


2. Click the **Ellipses Menu** beside the form you want to print.
   A dialog box displays the possible actions.
3. Click **Preview**.
   The **Preview** dialog box displays.



4. Click **Print** .

   The form displays in a new window with a **Print** icon on the top right



5. Click **Print** .
   A Print dialog window displays.

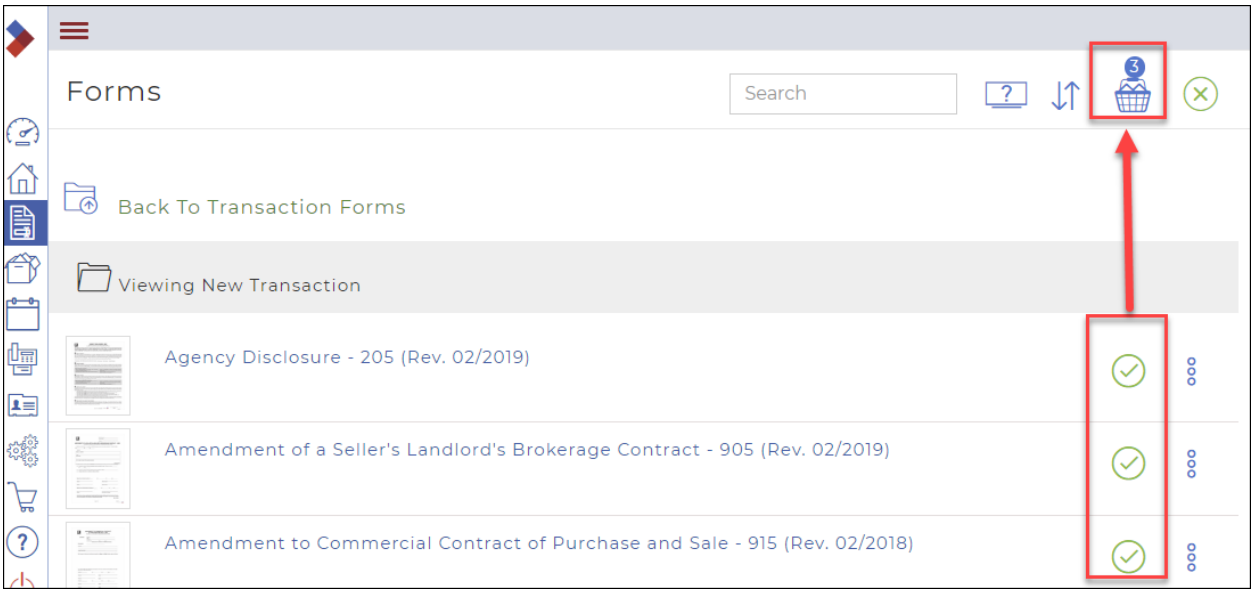
6. Select the correct **Destination** for the printer and click **Print**.

Your form will be printed.

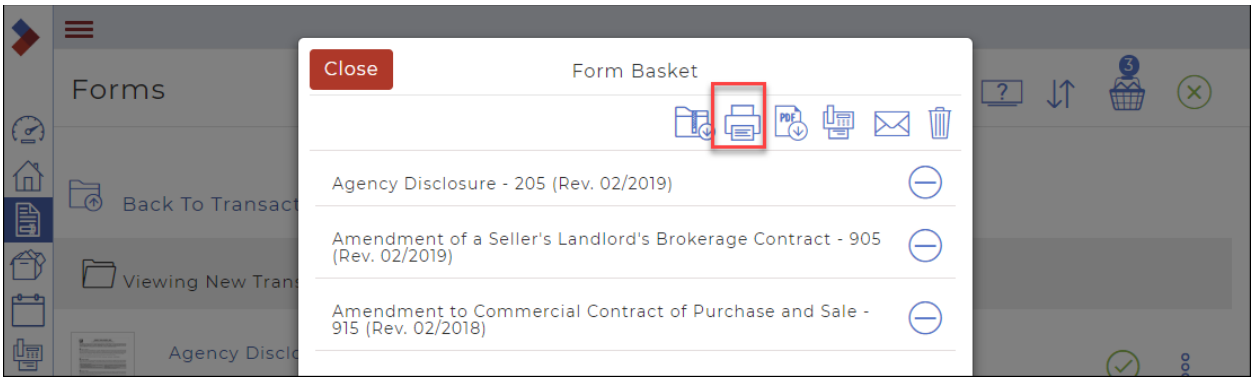
Printing multiple forms from the forms folder

To print multiple forms from the forms folder:

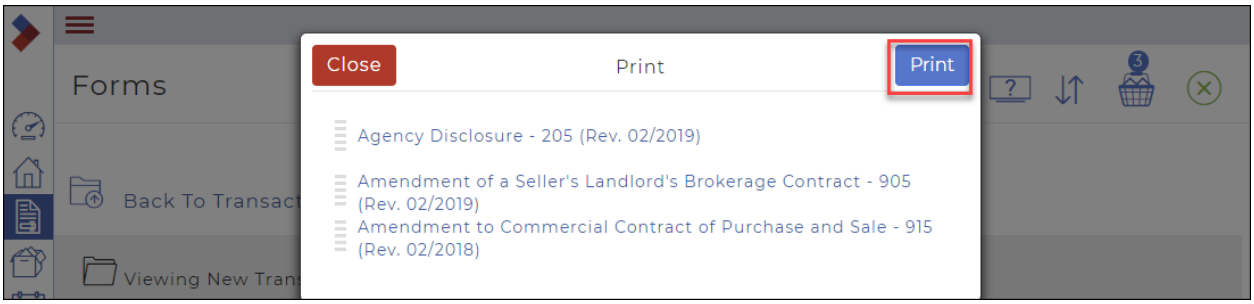
1. Click **Forms** and locate the form you need to print in the **Forms** folder.



2. Select the forms you want to print.
   The forms will be added to your basket, and the total number will be indicated on top of the basket.
3. Click the **Basket** .
   The **Form Basket** dialog box displays, allowing you to delete forms, and perform actions on the selected forms.

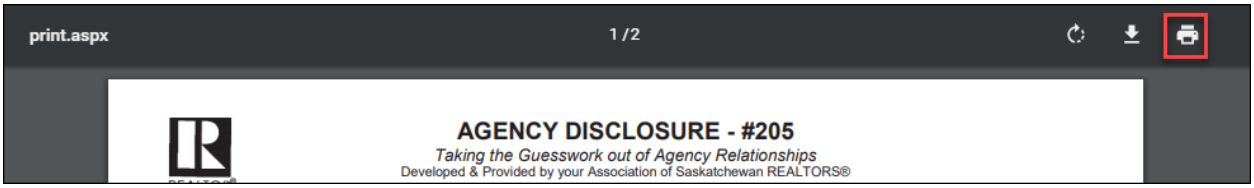


4. Click **Print** .
   The **Print** dialog box displays.



5. Click **Print**.

   The forms display in a new window with a **Print** icon on the top right



6. Click **Print** .
   A Print dialog window displays.

7. Select the correct **Destination** for the printer and click **Print**.

Your forms will be printed.

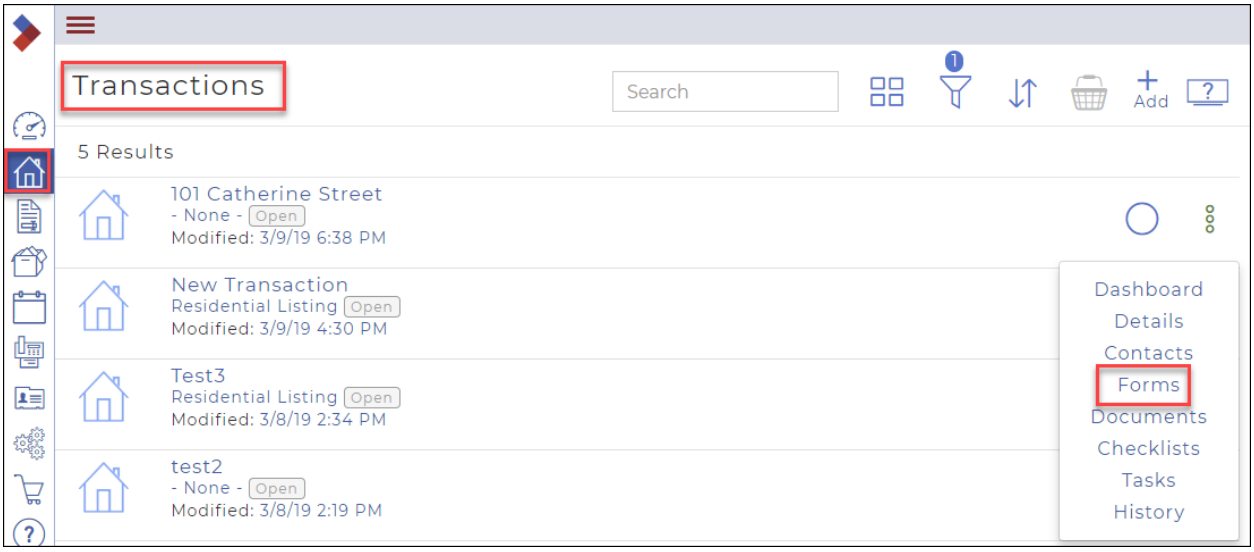
Printing a form from a transaction

You can print a form that is attached to a transaction.

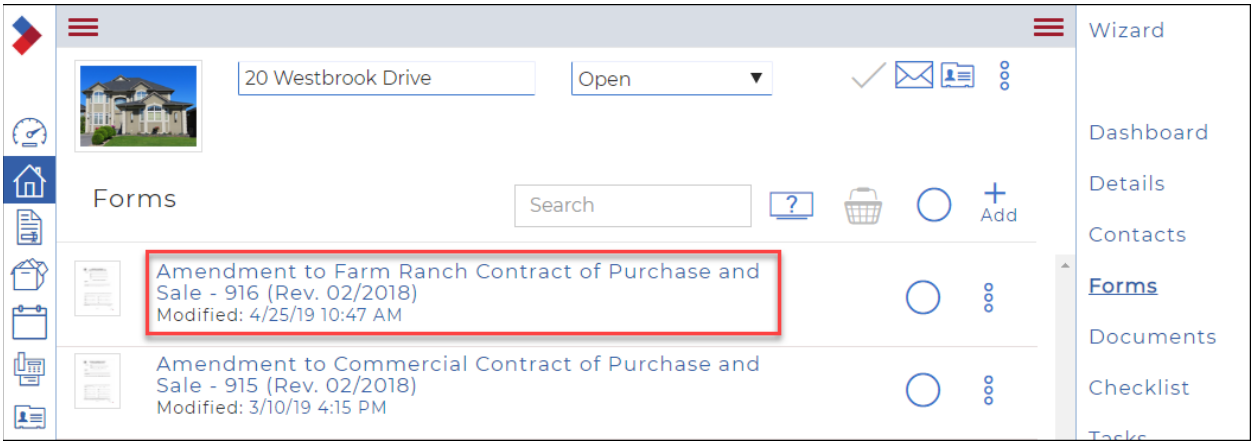
CLICK TO VIEW VIDEO

To print a form from a transaction:

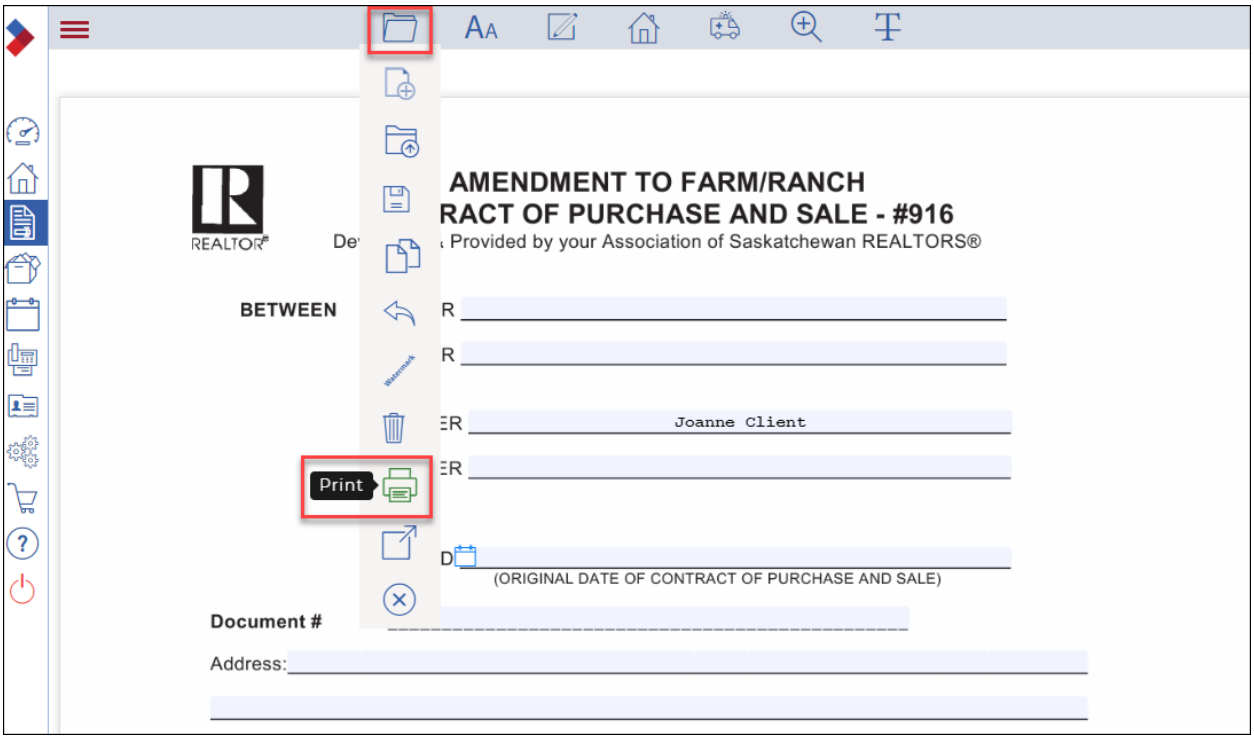
1. Click **Transactions.** and locate the transaction that includes the form you want to print.
2. Click the **Ellipses Menu** beside the transaction.
   A dialog box displays the possible actions.



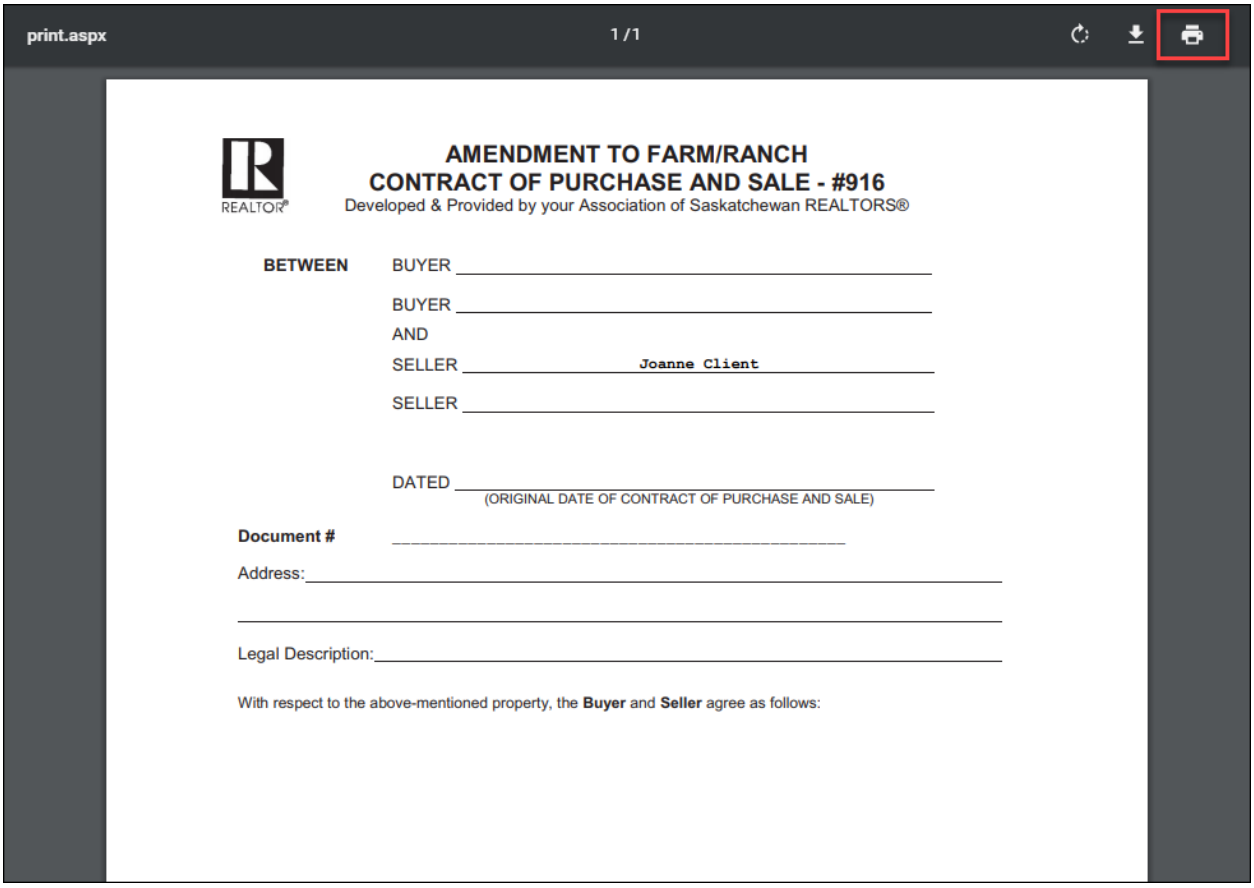
3. Click **Forms.**
   A list of forms attached to the transaction displays.



4. Click the name of the form you wish to print.
   The form opens in the forms editor.



5. Click **File** to display a dropdown menu, then click **Print** .
   A print window displays.



6. Click **Print** in the top right corner.

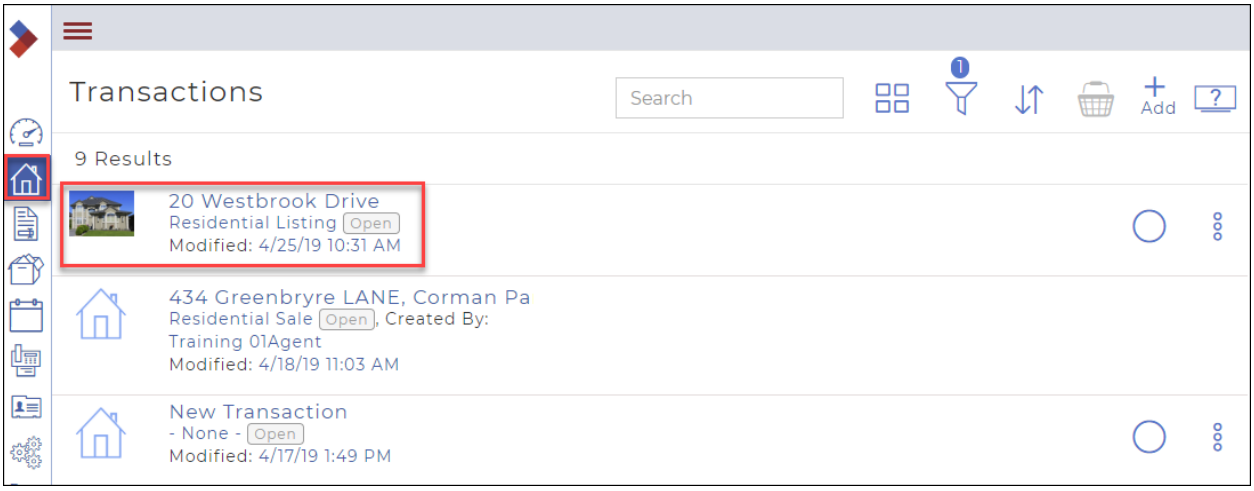
Printing multiple forms from a transaction

You can print multiple forms that are attached to a transaction.

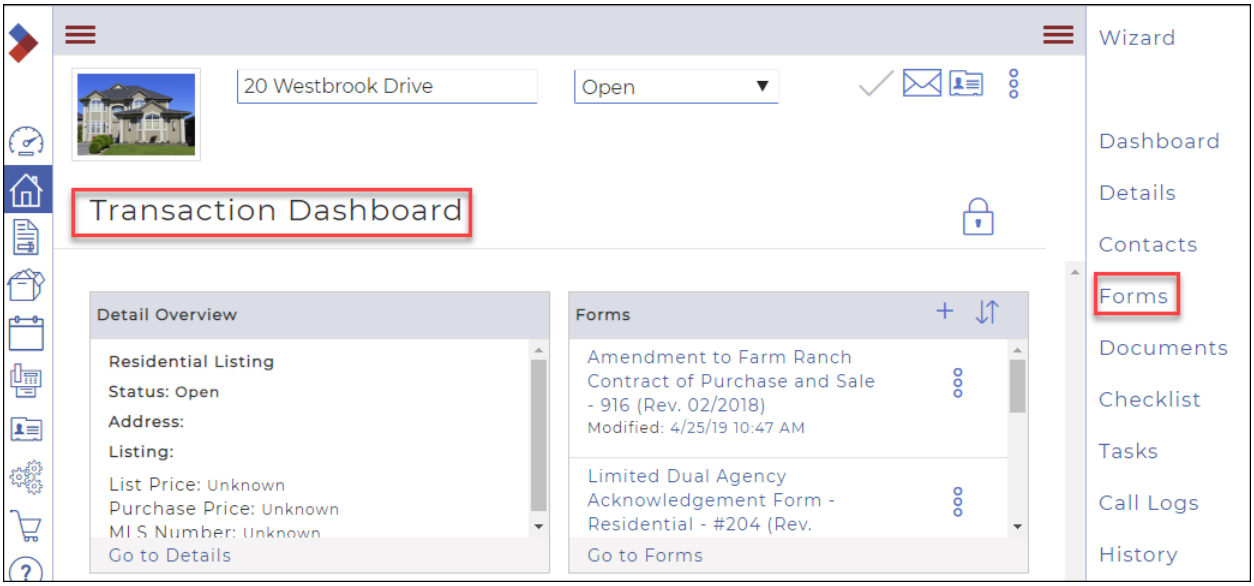
CLICK TO VIEW VIDEO

To print multiple forms from a transaction:

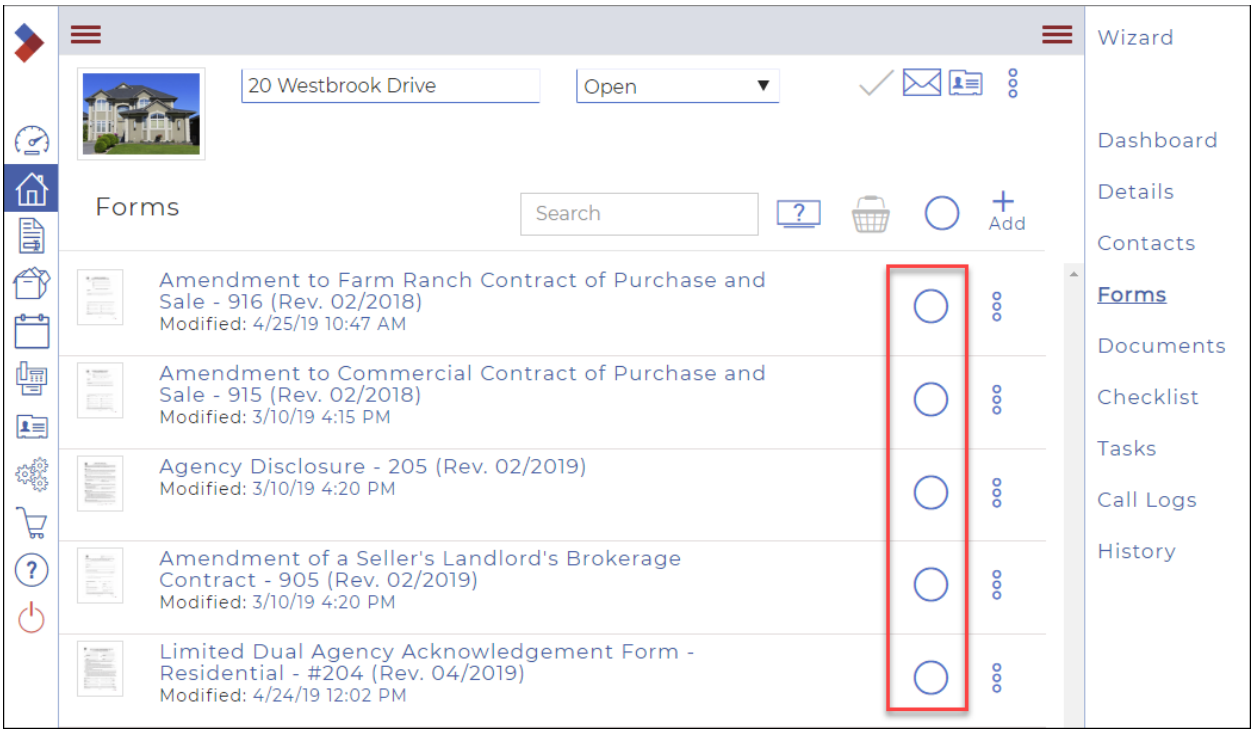
1. In the left sidebar, click **Transactions**.
   The **Transactions** list displays.



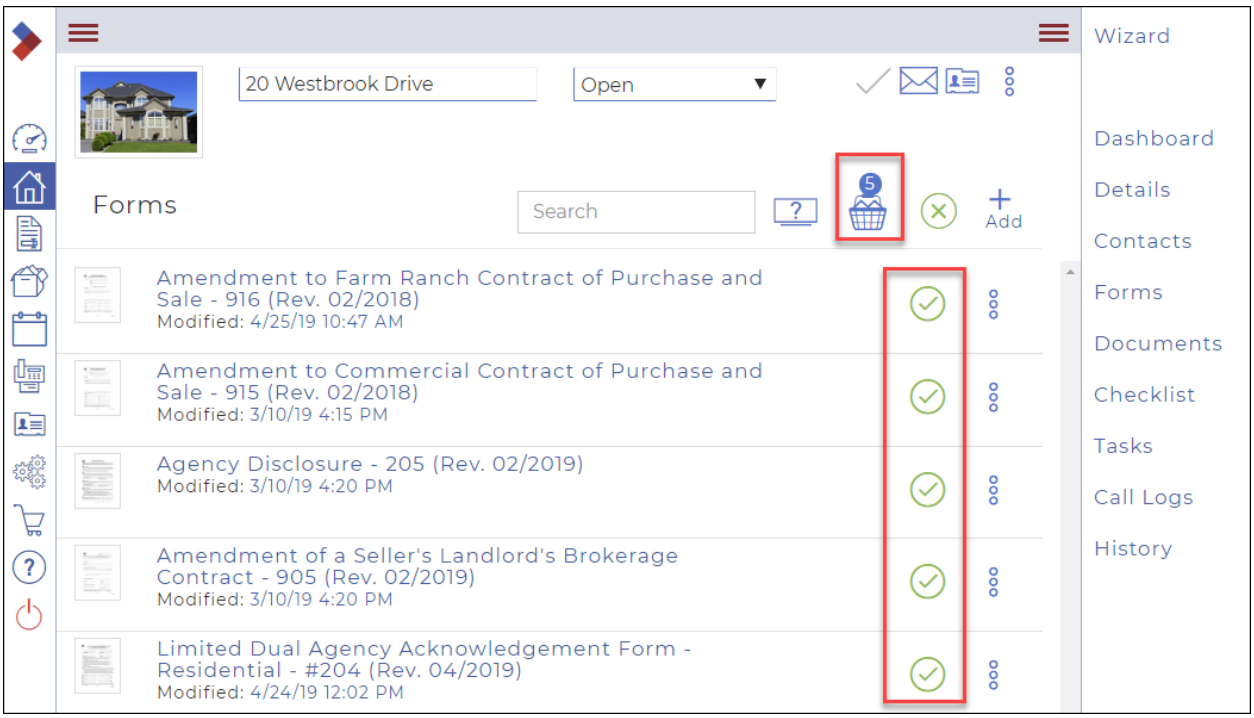
2. Click the name of the transaction that includes the forms you want to print.
   The **Transaction Dashboard** displays.



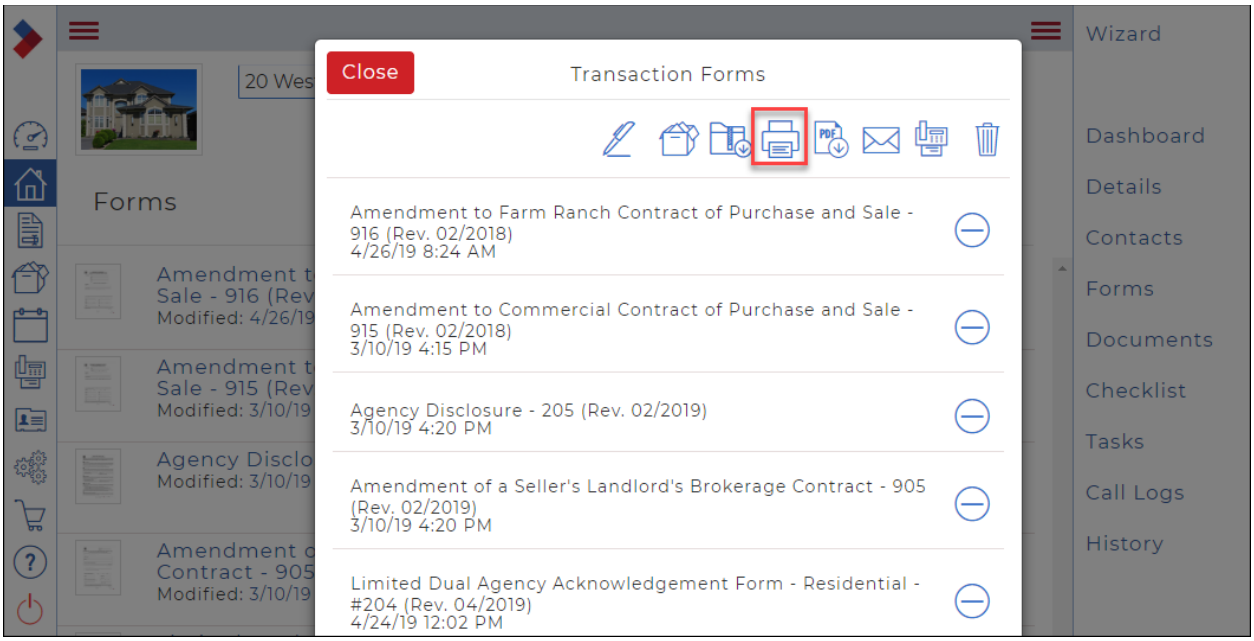
3. In the right sidebar, click **Forms**.
   The **Forms** window for that transaction displays.



4. Click in the select circle ○ to select the forms you wish to print.
   The forms are added to the basket.

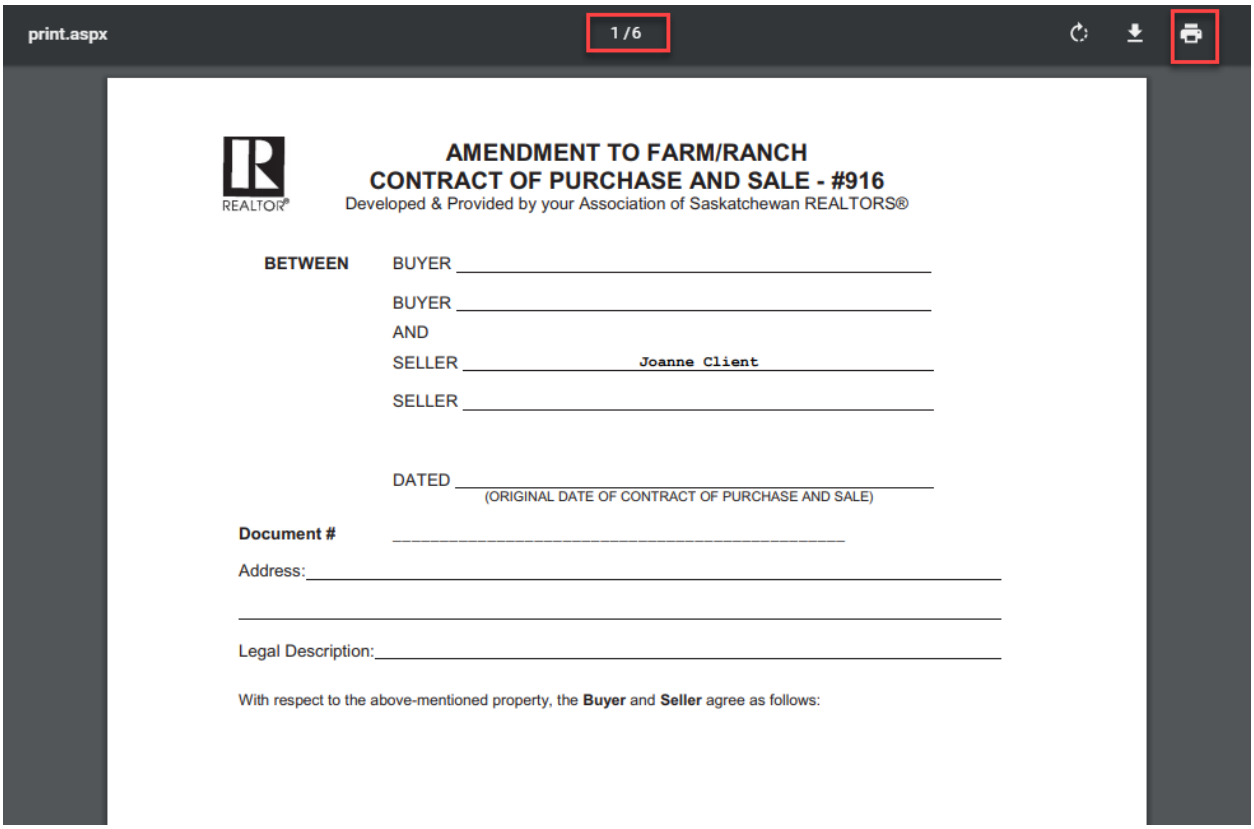


5. Click the **Basket** .
   The **Transaction Forms** dialog box displays the forms you selected.



6. Click **Print** .
   The **Print** dialog box displays.

7. Click **Print**.
   A print window displays.



8. Click **Print** in the top right corner.

Downloading a form

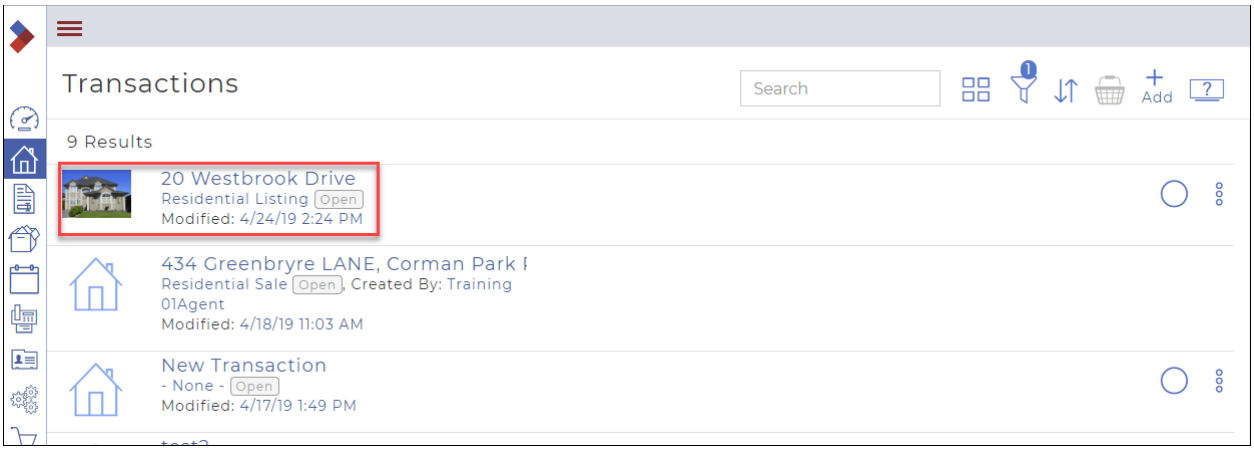
Download a pdf file of a form when you need to work with a hard copy version of it. For example, if an outside broker on your deal does not use paperless solutions, you can download the form and print it out in order to sign it.

You can download a form from a transaction, or from the Forms list.

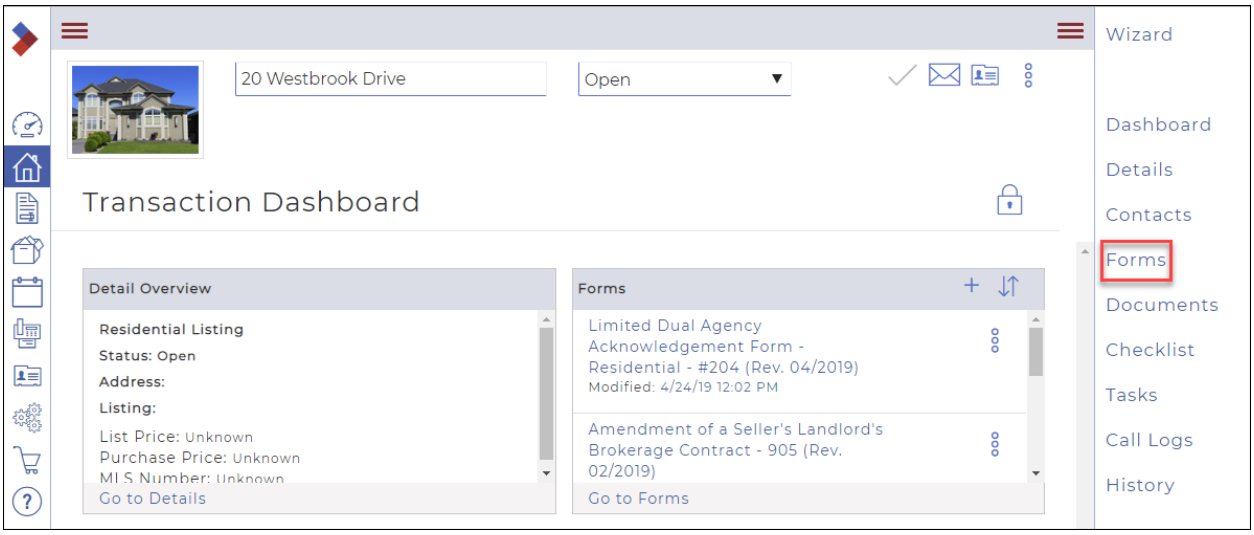
CLICK TO VIEW VIDEO

To download a form from a transaction:

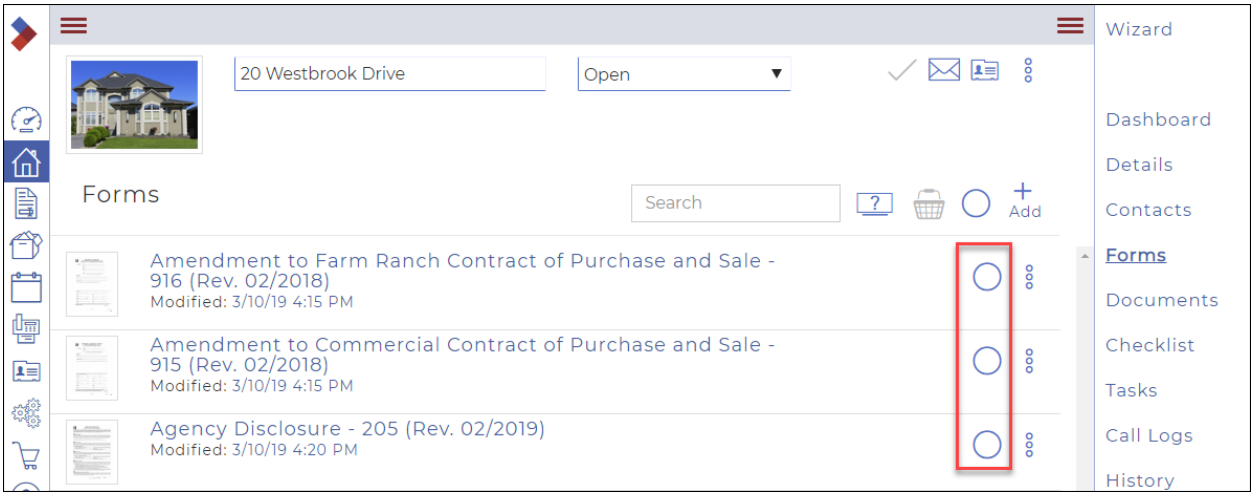
1. In the left Sidebar, click **Transactions** and locate the transaction that includes the form you want to download.



2. Click the transaction from which you wish to download forms.
   The **Transaction Dashboard** displays.

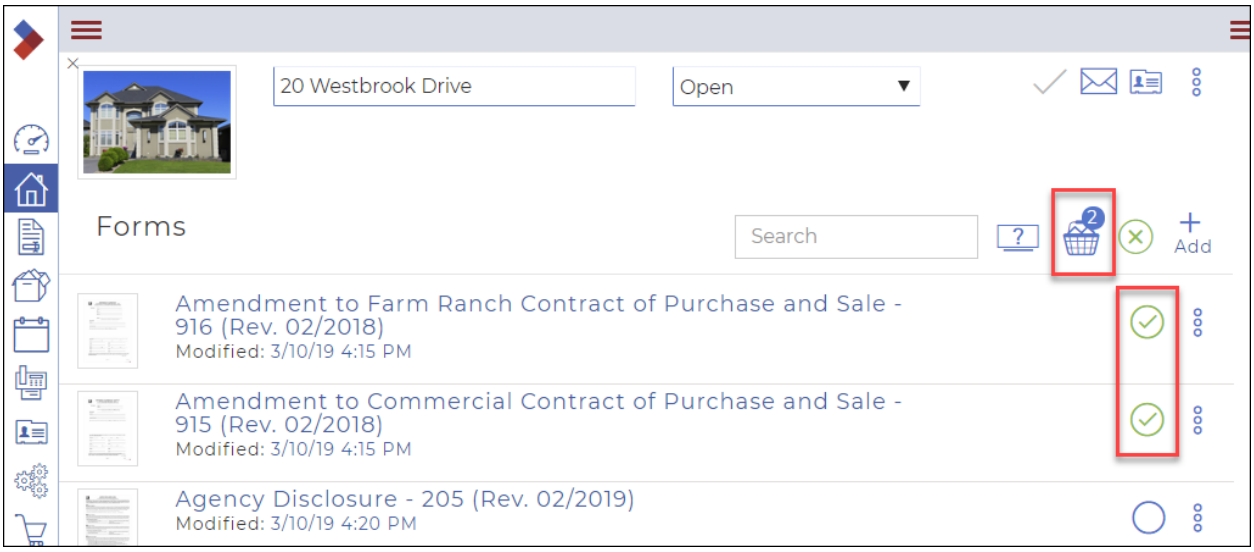


3. Click **Forms** in the right sidebar.
   A list of forms attached to the transaction displays.

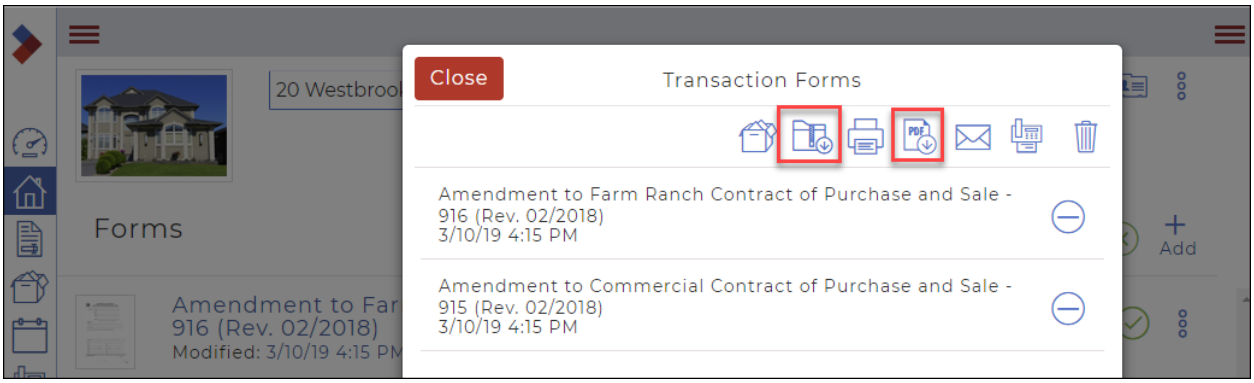


4. Click the select circle beside the form(s) you wish to download.

The forms are added to the basket.



5. Click the **Basket** .
   The **Transaction Forms** dialog box displays.



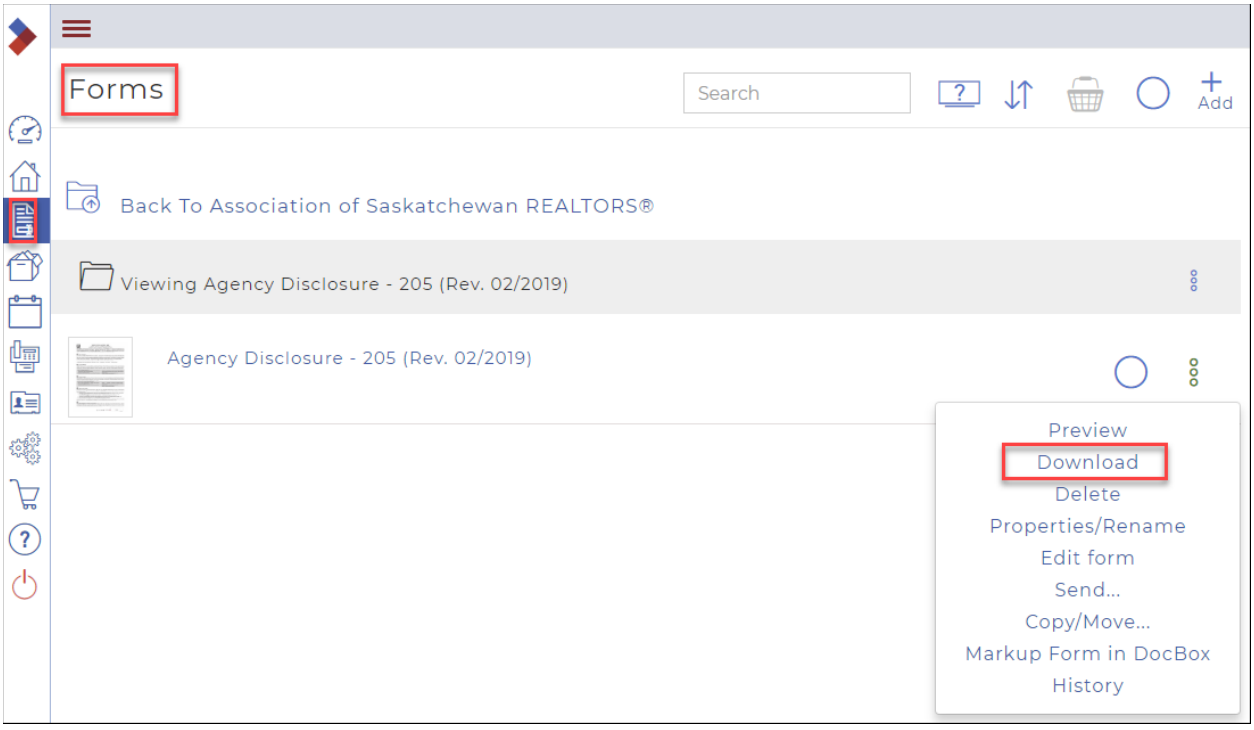
6. Click the appropriate icon to download as a ZIP file or as a PDF file .
   The ZIP file will display in your Downloads folder.
   For the PDF download, a **Save as PDF** dialog box displays.

7. Enter the name of the PDF and click **Save**.

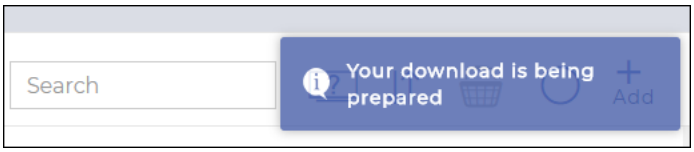
CLICK TO VIEW VIDEO

To download a form from the Forms list:

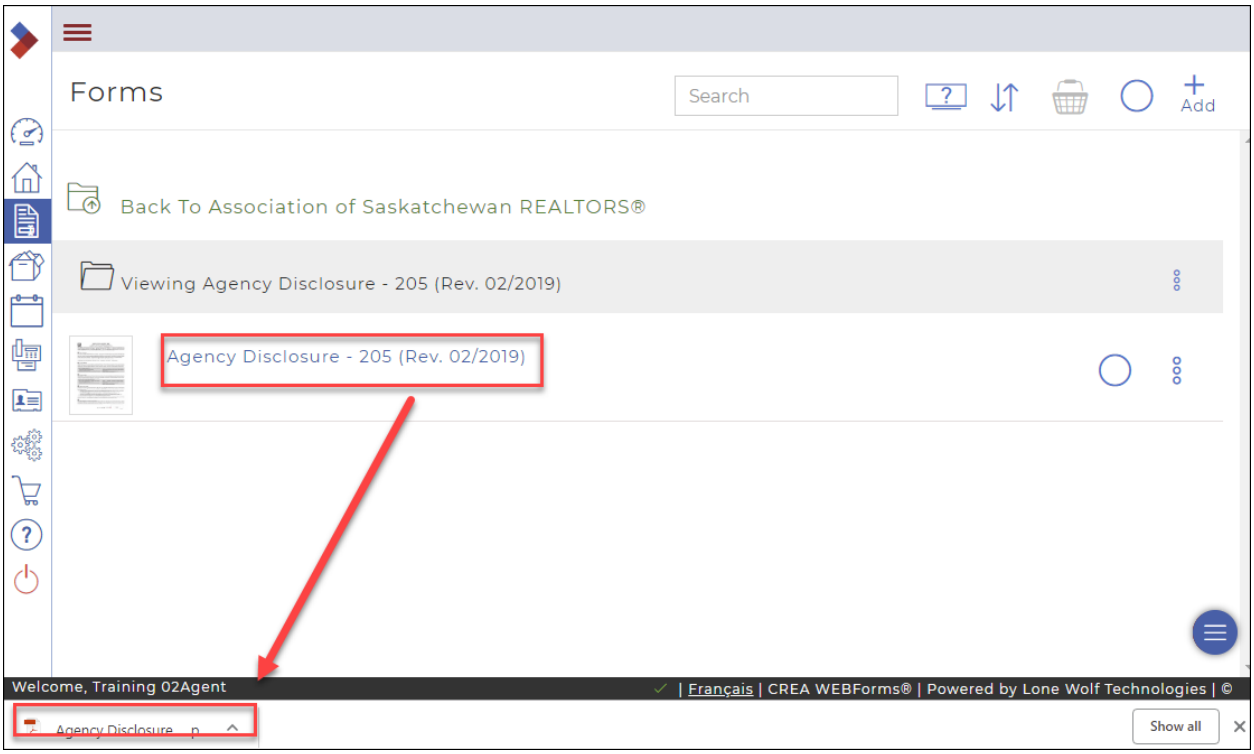
1. Click **Forms** and locate the form you need to download.



2. Click the **Ellipses Menu** ⋮ beside the form you want to download
   A dialog box displays the possible actions.
3. Click **Download**.
   A message briefly displays in the top right corner.



The form is downloaded to your computer as a pdf file.



Inserting a clause into a form

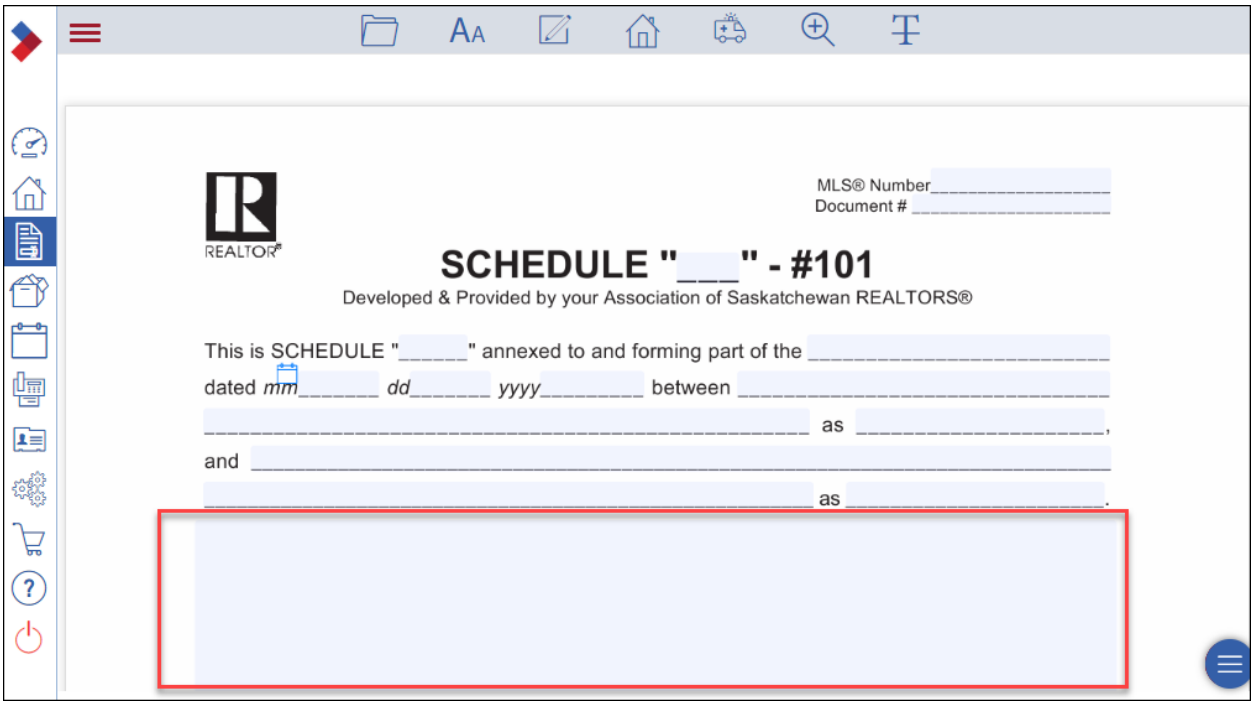
If a form has an **Insert Clauses** link, you can insert clauses into that form. On some forms such as Schedules and Addendums, you can insert clauses provided by your Provincial Association, Board Clauses, recommended clauses provided by your office or your own custom clauses.

CLICK TO VIEW VIDEO

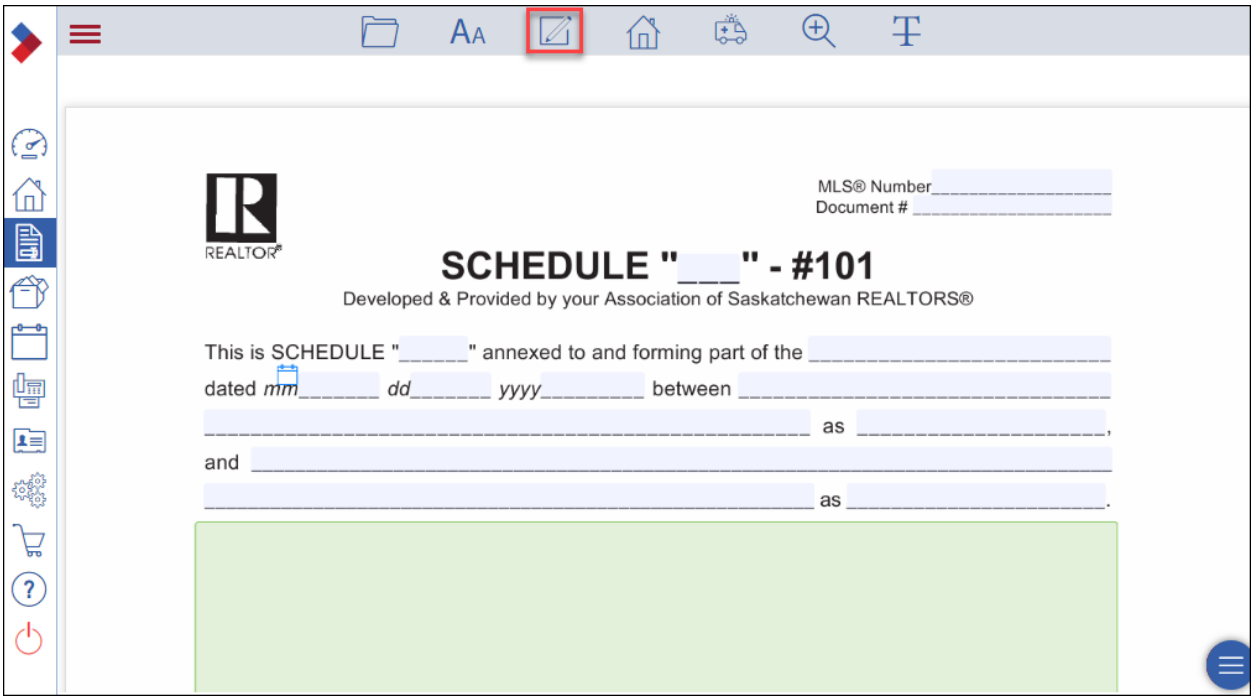
To insert a clause into a form:

1. Click **Forms** and locate the form in which you want to insert a clause.

2. Click the name of the form to open it in the forms editor.



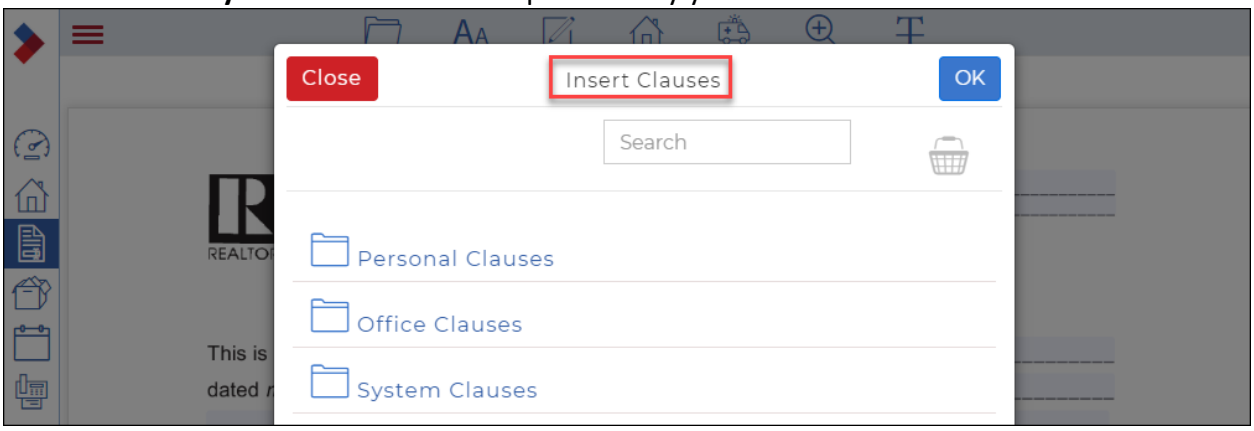
3. Click the text area where you want to insert a clause.
The grey area will change to green, indicating that it is selected.



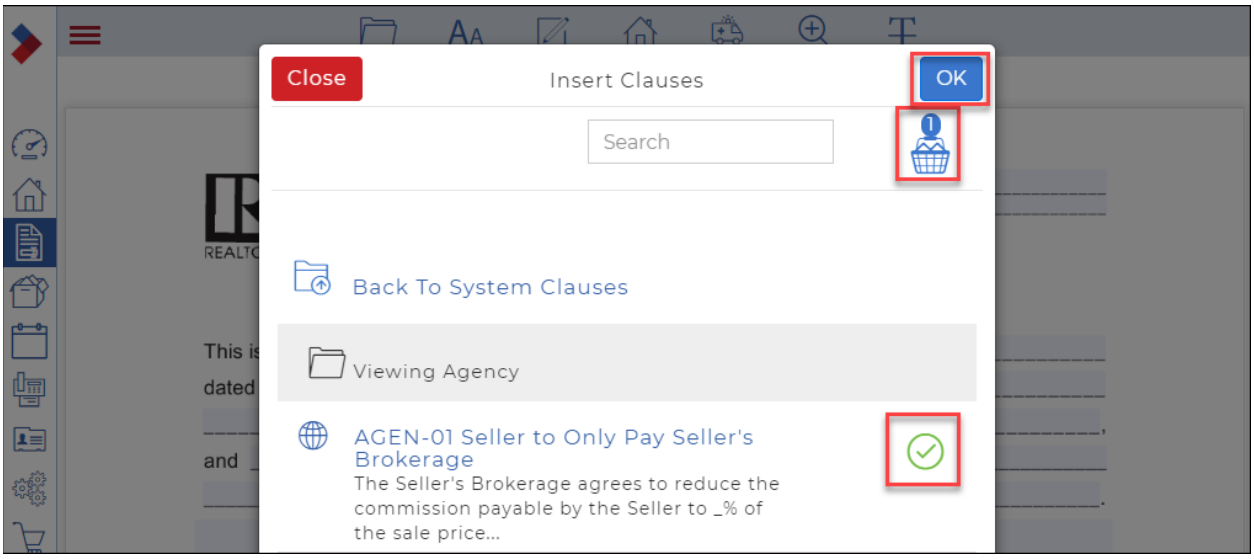
4. Click **Clause** to open the **Insert Clauses** dialog box.
You can select one or more clauses from the three categories of clauses:

- **Personal Clauses**: your own personal clauses, or

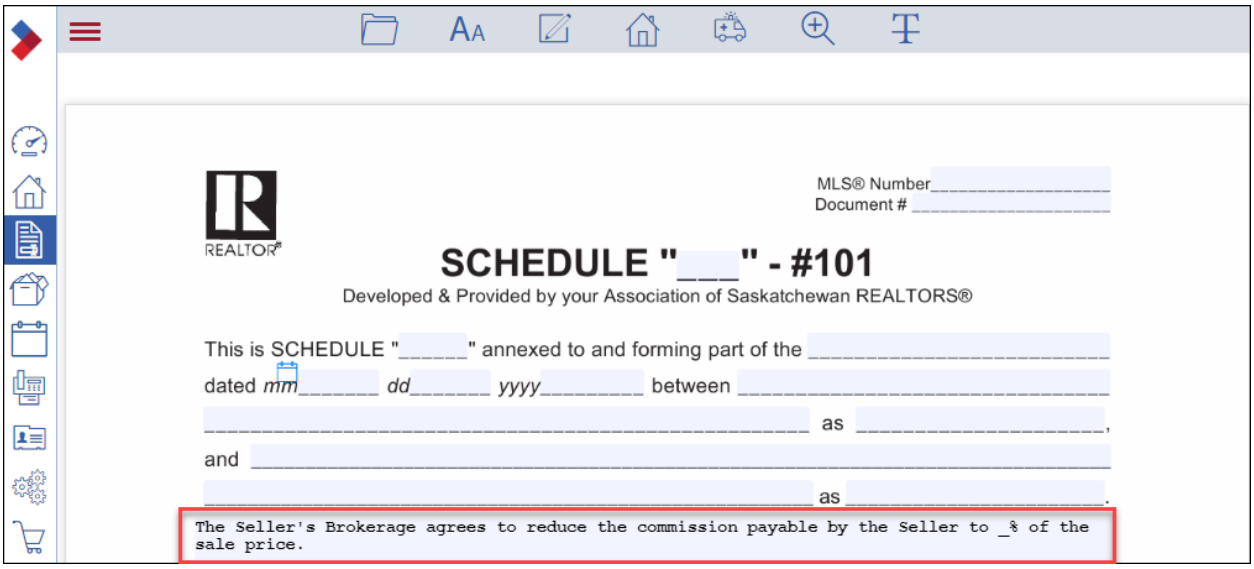
- **Office Clauses:** clauses provided by your brokerage, or
- **System Clauses**: clauses provided by your Board or Association.



5. Click the folder to open a list of clauses.



6. Click the circle beside the clause(s) you want to select.
   The clause(s) is/are added to the basket.
7. Click **OK**.
   The clause has now been inserted in the form.



Working with Transactions

A Transaction (Transaction Kit) is like a binder that holds all your saved forms, contracts, clauses and information that applies to a particular transaction or deal. A Transaction (Transaction Kit) can be saved to the WEBForms® server, emailed to clients, modified later, copied, downloaded, or printed. A Transaction (Transaction Kit) automatically shares data, such as MLS® data and other common information, between all the forms in your Transaction (Transaction Kit) – saving time and reducing errors.

This section includes:

Creating a transaction

Using the 5-step Transaction Wizard to edit your transaction

Creating a new transaction from a form

Creating a form and adding it to an existing transaction

Editing a transaction

Attaching a form(s) to an existing transaction

Applying a template to an existing transaction

Adding a photo to a transaction

Adding a checklist to a transaction

Archiving a transaction

Deleting a transaction

Viewing the progress of a transaction

Viewing the status of in-progress transactions

Sharing a transaction with a client

Linking to and sending Transaction forms to an esignature provider

[Saskatchewan REALTORS® Only – Sending CREA Legacy Transaction Kits to Authentisign]

Creating a transaction

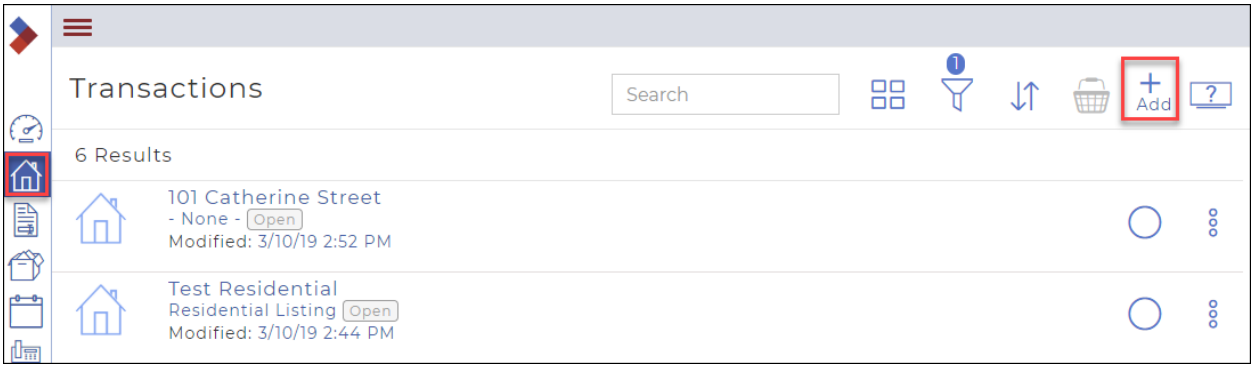
You can use a transaction to represent any interaction with a client, from a new listing to the completion of a sale.

You can add a transaction manually, where you manually provide all the transaction information. You can also use an MLS® System 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.

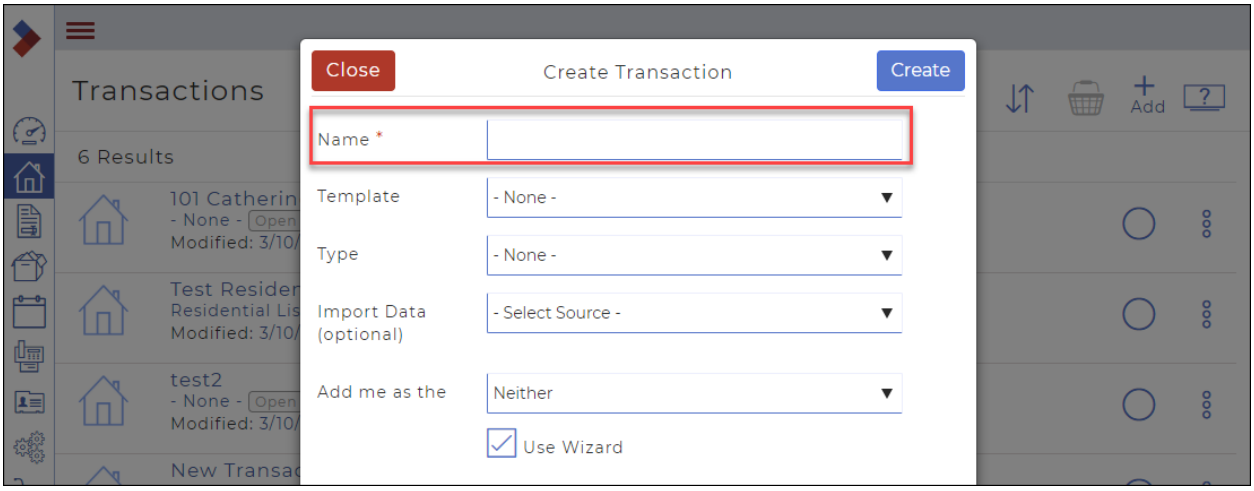
CLICK TO VIEW VIDEO

To create a transaction:

1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



2. Click **Add**.
   The **Create Transaction** dialog box displays.

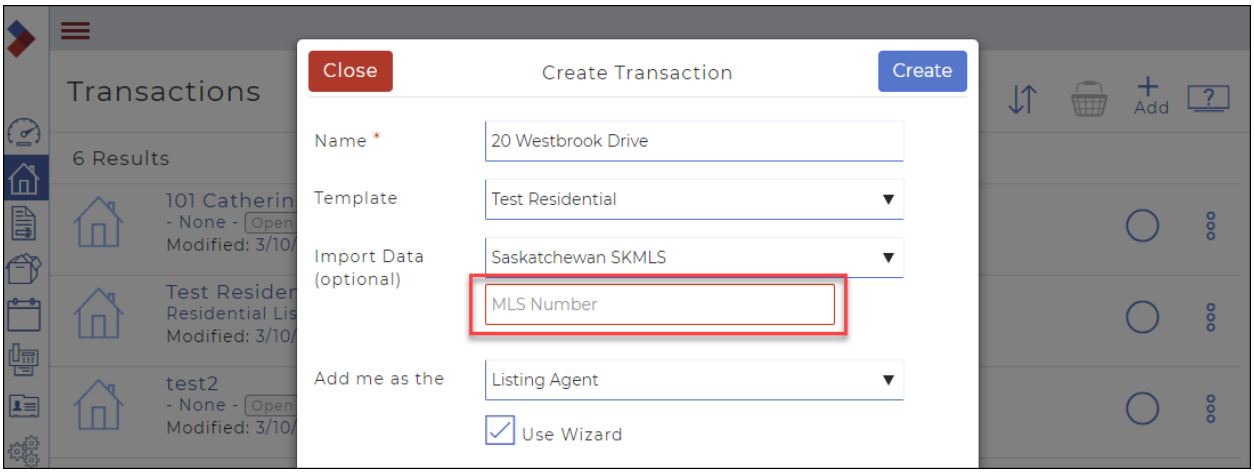


Note: Required fields are indicated with an asterisk.*

3. Enter a **Name** for the transaction. Typically, this is the street address of the property.
4. Use the **Template** dropdown to select the appropriate template to automatically add a checklist, forms, and documents. If you have not yet created any templates, the option is not available. In that case, select the **Type** from the dropdown menu.

Note: Consider creating a template first.

5. Use the **Import Data** dropdown to select the MLS® System listing as a source of information for the transaction. Additional fields display.



6. In the **MLS Number** field, enter the MLS® System number of the listing.
7. Use the **Add me as the** dropdown to select your role in the transaction. Choose from Listing Agent, Selling Agent, Neither, or Both.

   Caution: You may automatically be added, depending on your settings.

8. Click **Create**.
   The Wizard window displays **Details: Step 1 of 5.**
   You can now use the 5-step Transaction Wizard to edit your transaction. Much of the listing information is populated automatically from the MLS® System listing.

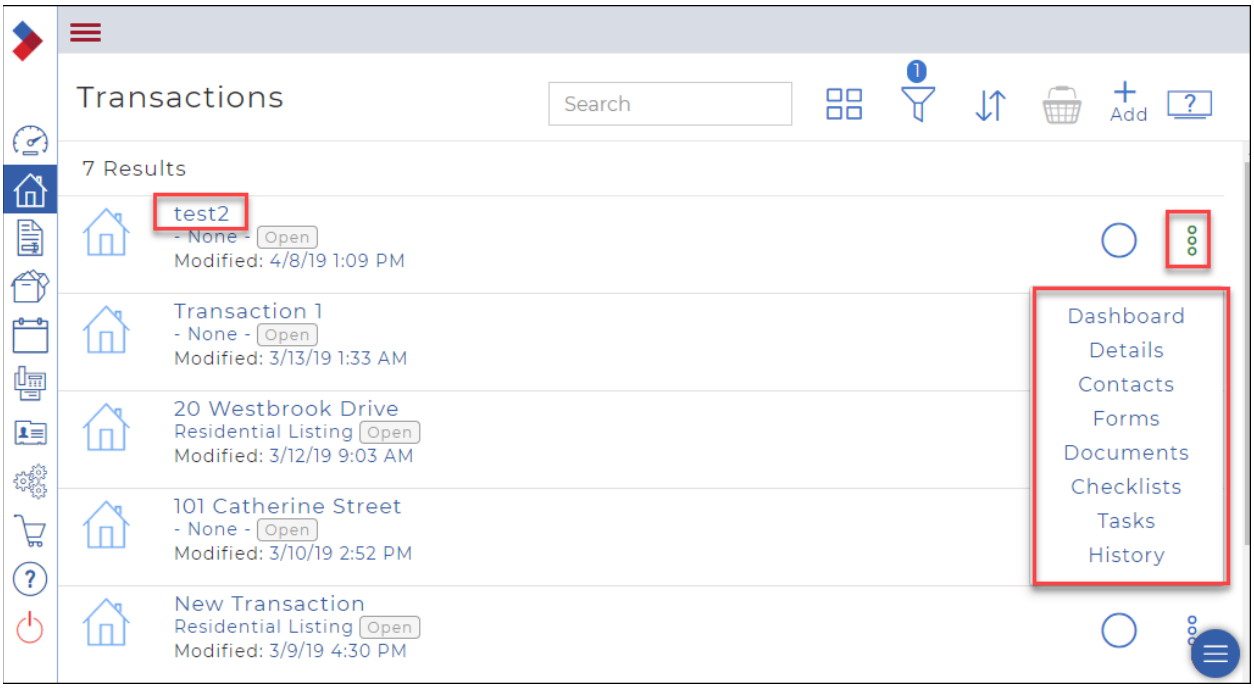
Using the 5-step Transaction Wizard to edit a transaction

Once a transaction is created, you can continue using the Transaction Wizard to edit your transaction.

To use the Transaction Wizard to edit a transaction:

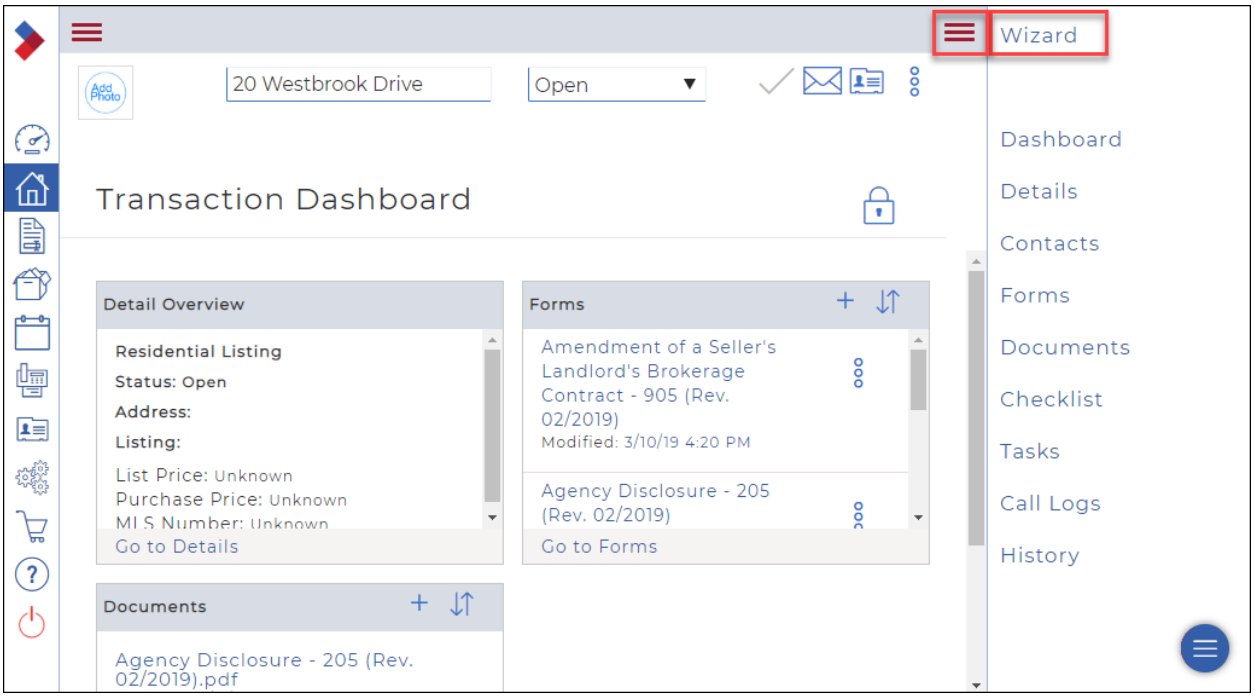
Note: If you create a transaction, the transaction wizard Step 1 will automatically display. Continue on to step below.

1. Access the Transaction Wizard by clicking **Transactions** in the Sidebar to display the list of **Transactions**.



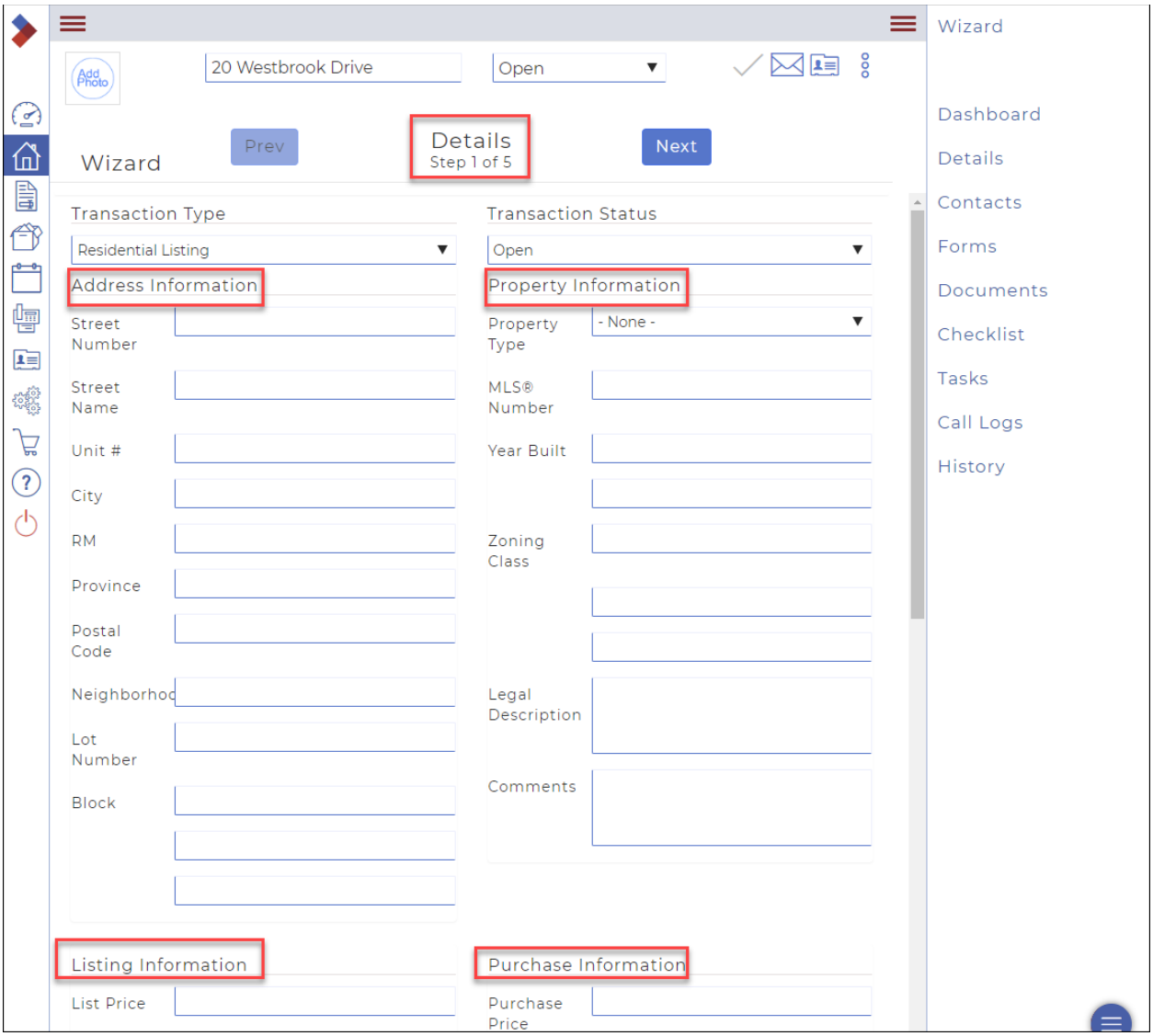
2. Click the transaction name, or anywhere in the ellipse menu.
   The right menu displays.

   Note: You can use the expand/collapse toggle *on the top right to expand and collapse the right menu.*



3. Click **Wizard**.

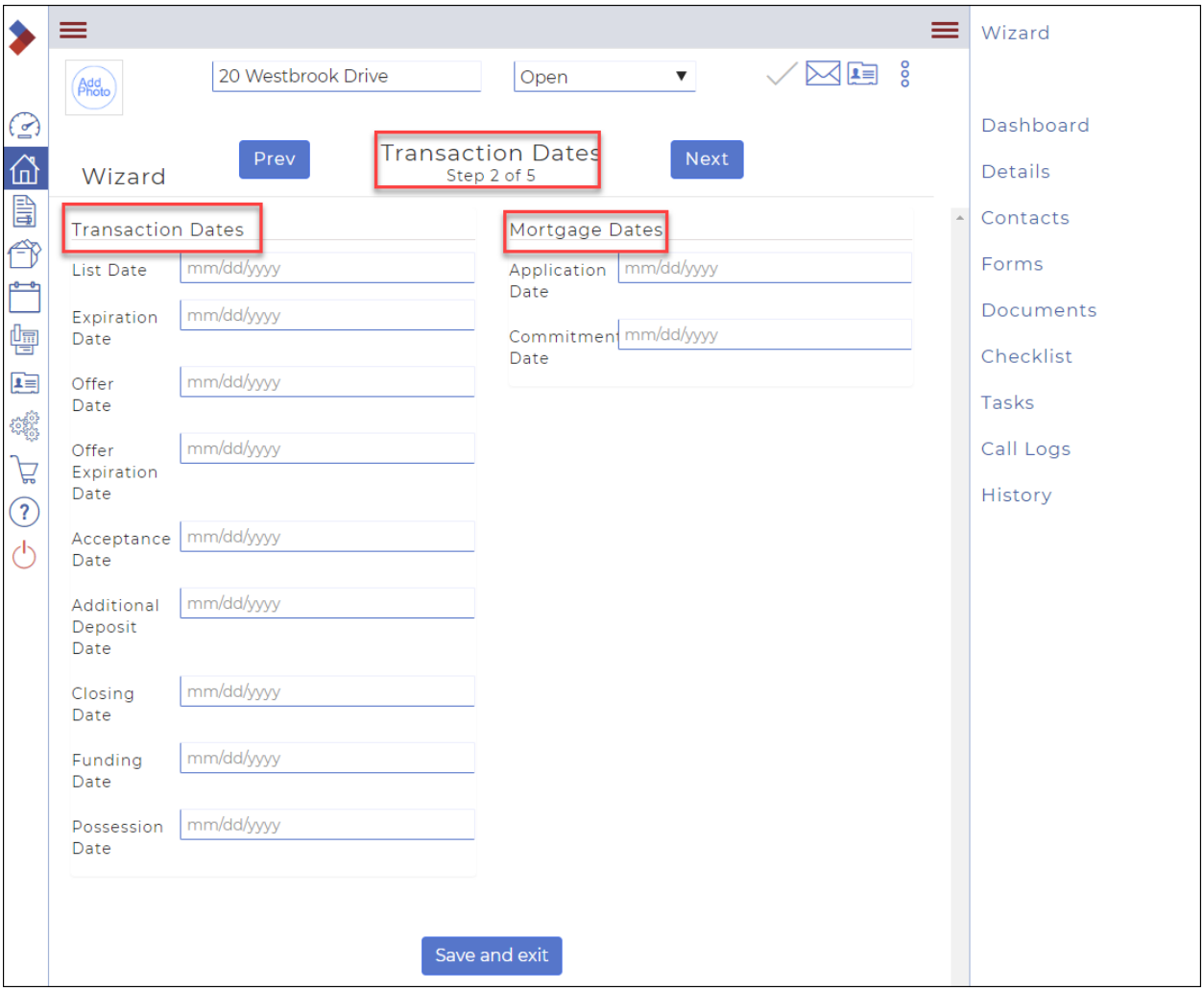
   The Wizard window displays **Details: Step 1 of 5.**



4. Add as much information as possible in the following areas:
   - **Address information**
   - **Property Information**
   - **Listing Information**
   - **Purchase Information** (if this transaction includes sale information)

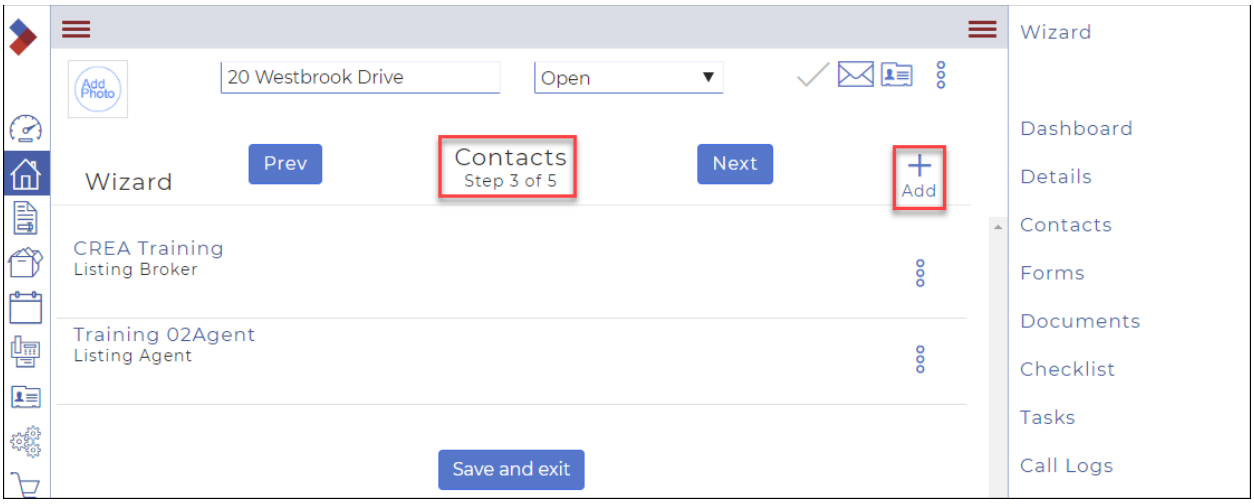
   *Note: At any time, you can scroll down and click **Save and exit**.*

5. Click **Next** to continue and add dates, contacts, documents, and forms to the transaction. The Wizard window displays **Transaction Dates: Step 2 of 5.**

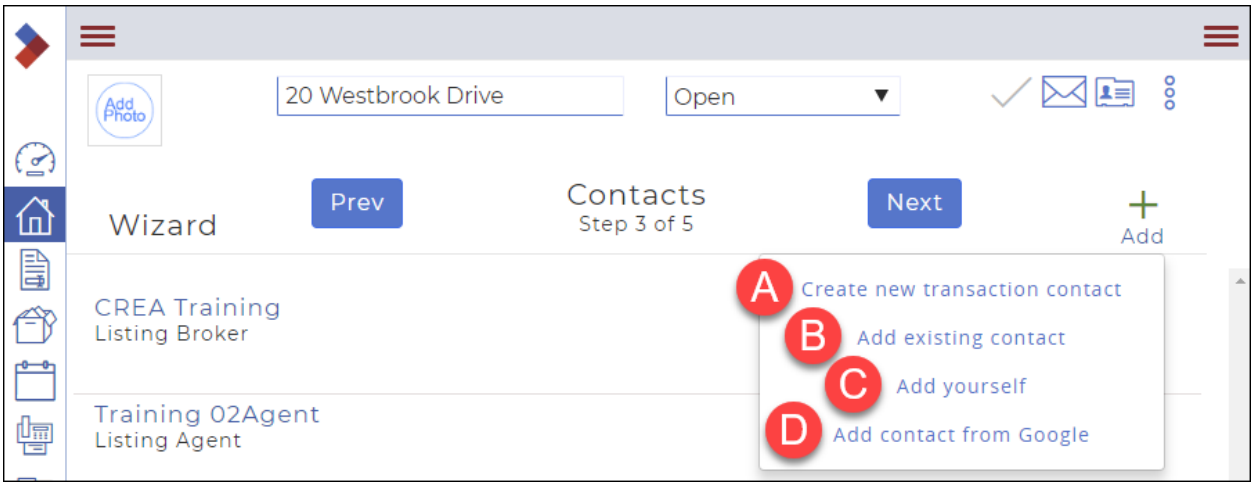


6. Add as much information as possible in the following areas:
   - **Transaction Dates**
   - **Mortgage Dates** (if applicable)
7. Click **Next**.
   The Wizard window displays **Contacts: Step 3 of 5.**
   This window lists all the contacts associated with the transaction.

   Note: If you added yourself to the transaction, your name *displays*. Other contacts are populated from the *MLS® System* listing.

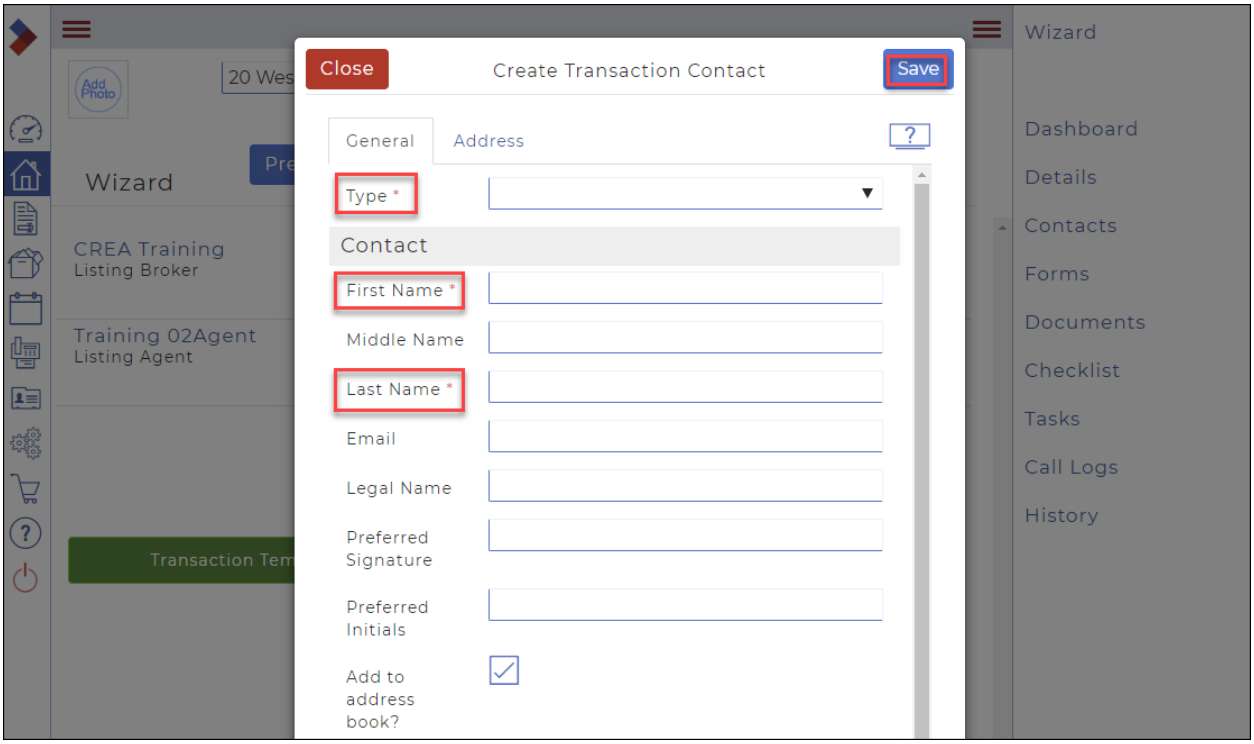


8. Click **Add** to add a contact to the transaction.
   A dialog box displays several options.



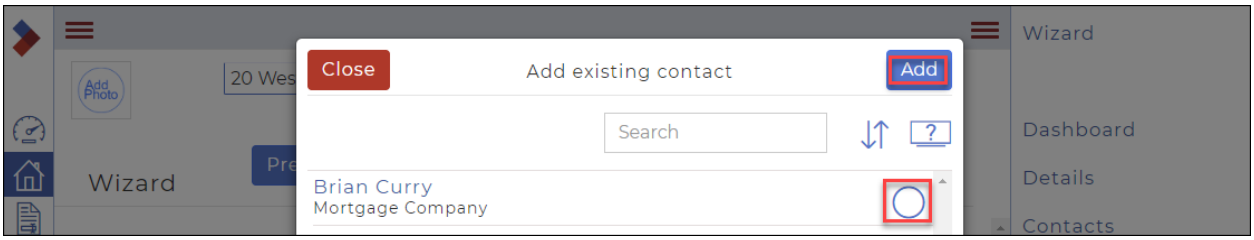
A. Create new transaction contact

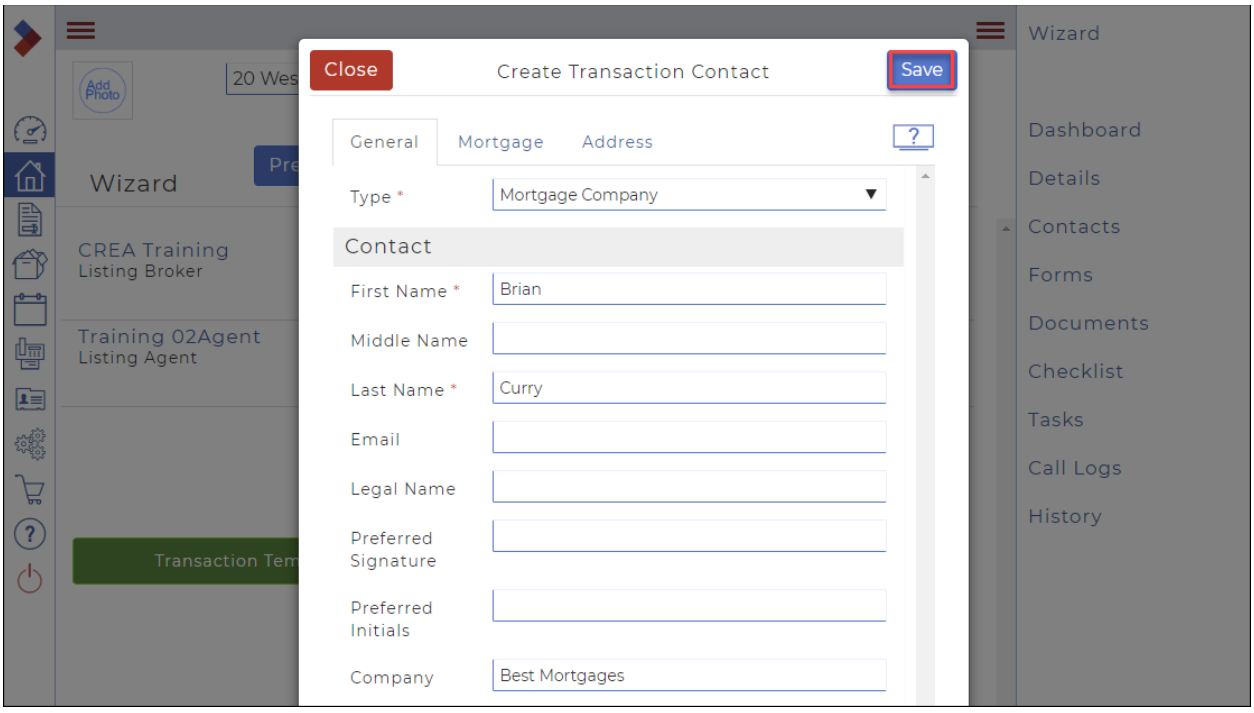
- Click to create a new contact in the transaction.
- Add the contact information, ensuring you provide the required information (**Type**, **First Name** and **Last Name**)
- To add the contact to your list of contacts, ensure **Add to address book** is checked.
- Click **Save**.



B. Add existing contact

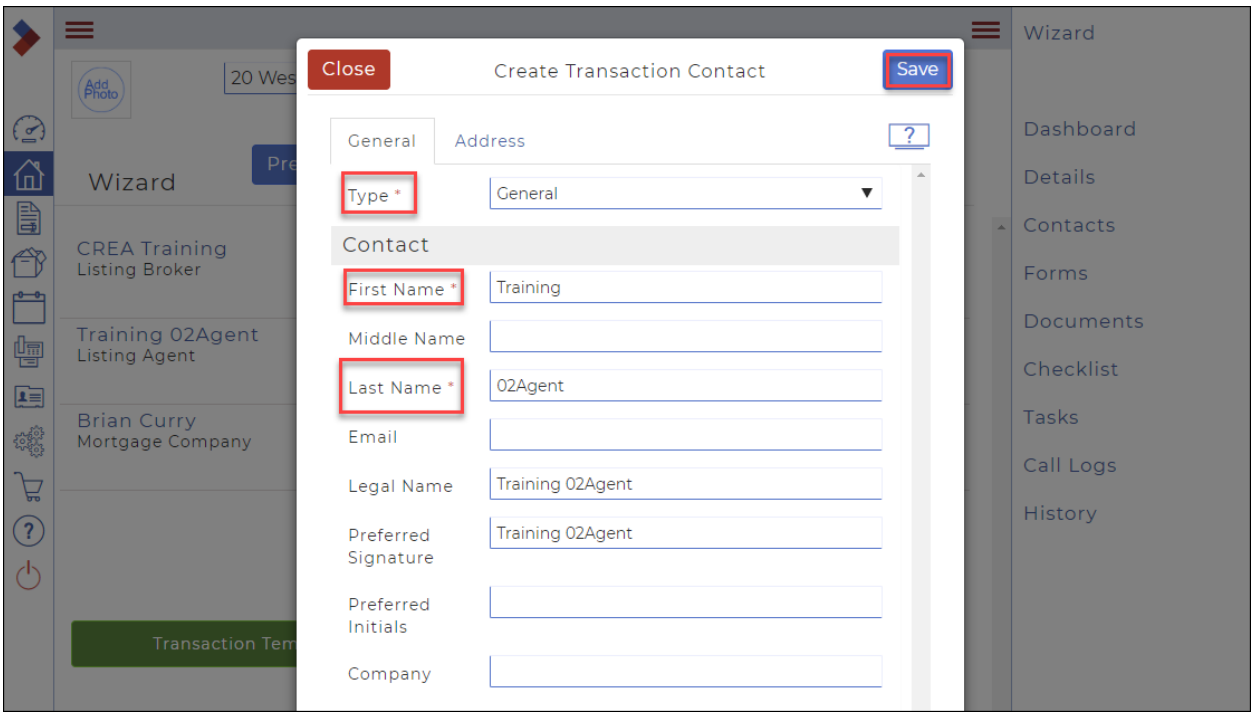
- Click to add a contact to the transaction from your existing list of contacts.
- Check one or more contacts from the list that displays and click **Add**.
- Add any additional information required.
- Click **Save**.





C. Add yourself

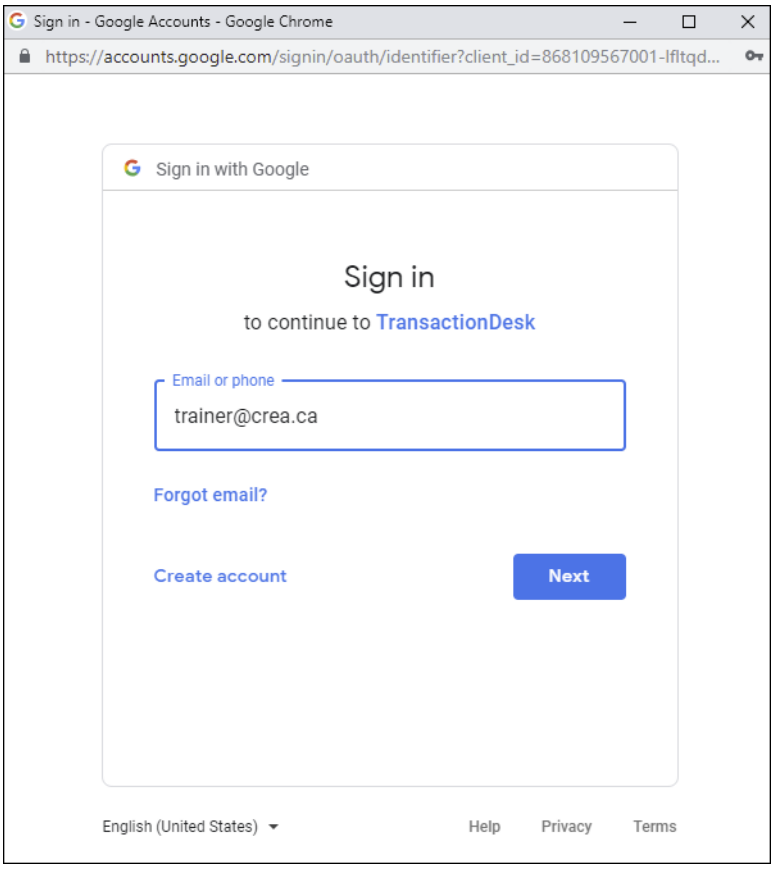
- Click to add yourself to the transaction.
- Add any additional information required.
- Click **Save**.



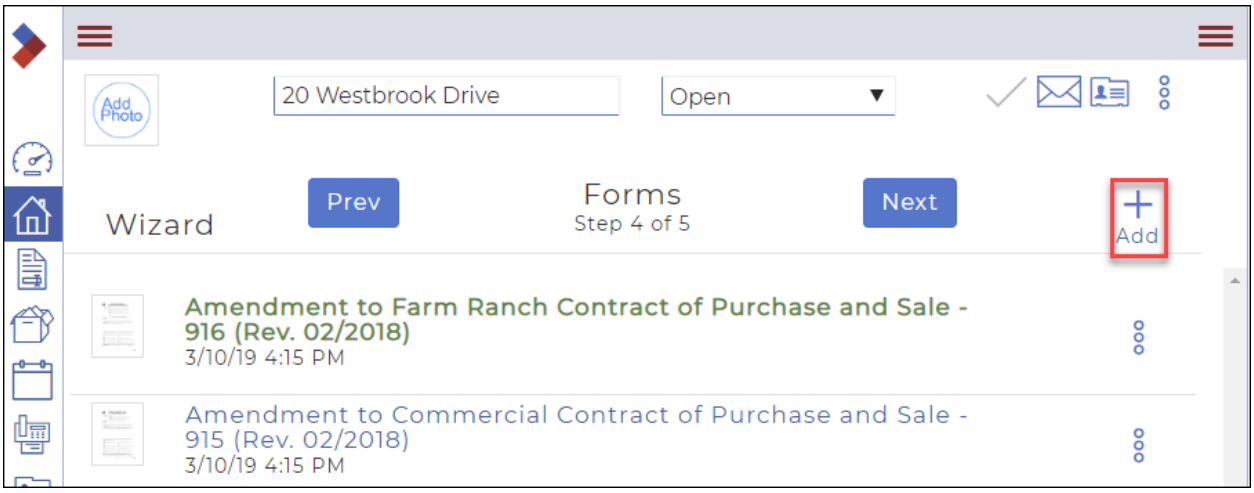
D. Add contact from Google

- Select to add one or more contacts from your Gmail list of contacts to the transaction and to the existing list of contacts in the system.

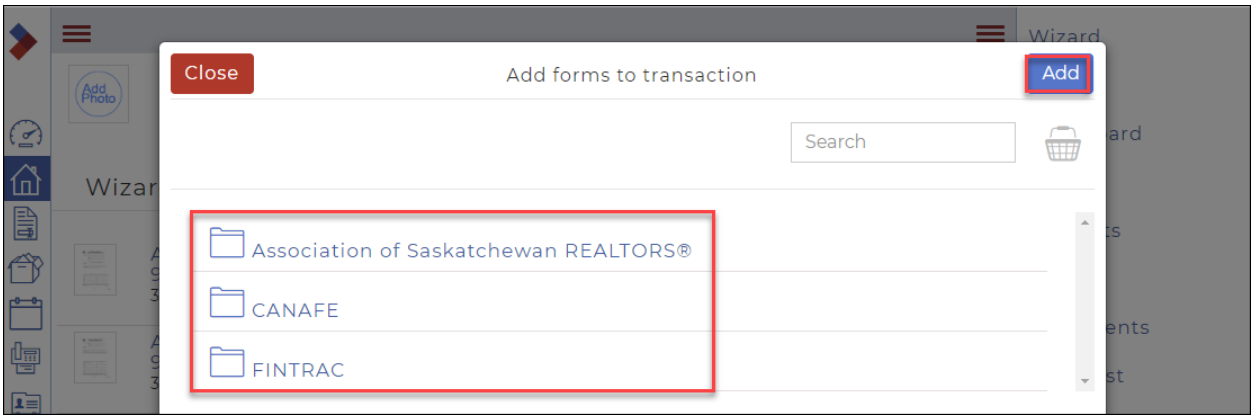
- Check the contact to add and click **Select**.
- Add any additional information required.
- Click **Save**.



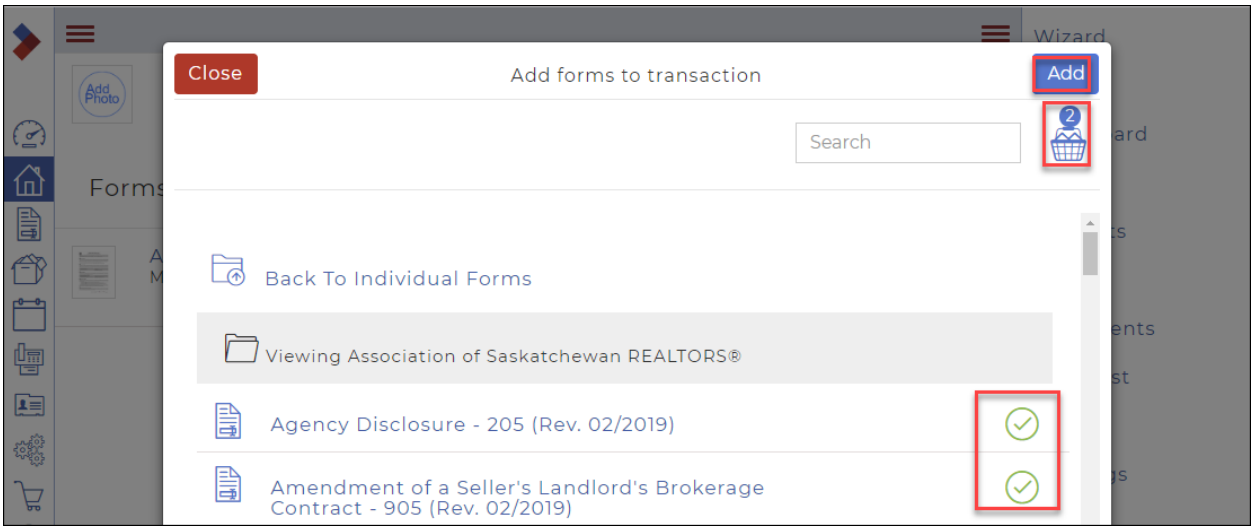
9. Click **Next**.
   The Wizard window displays **Forms: Step 4 of 5.**
   Any forms associated with the transaction through the template are listed here.



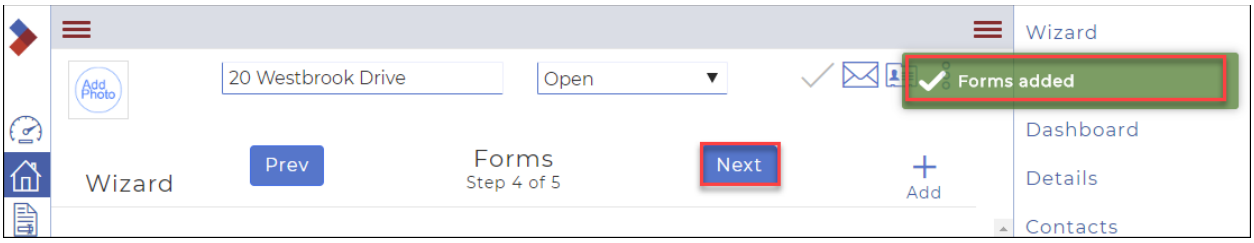
10. Click **Add** to add more forms to the transaction.
    The **Add forms to transaction** dialog box displays.



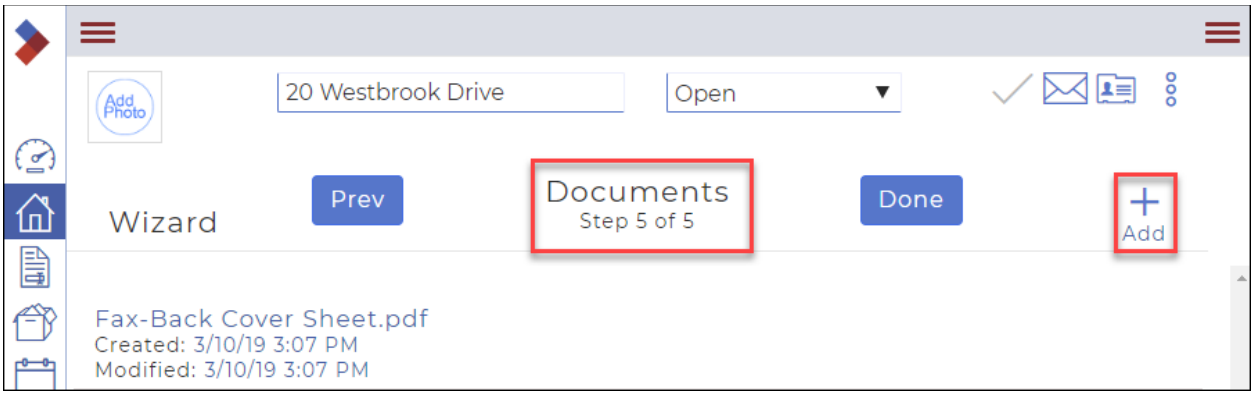
11. Navigate through the folders to the form(s) you want to attach, or search for the forms by name in the **Search** box. Click in the circle to select the form(s).
    The form(s) will be added to your basket. You can see how many forms are selected above the basket.



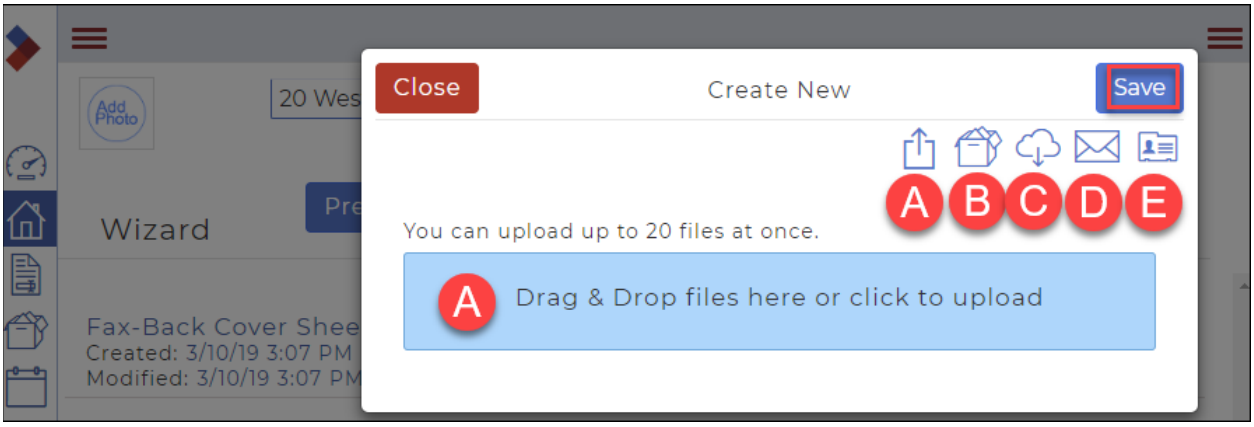
12. Click **Add**.
    A message briefly displays in the top right corner confirming that your forms have been added, and you are returned to the Forms window of the Wizard



13. Click **Next**.
    The Wizard window displays **Documents: Step 5 of 5.**
    This is the list of documents associated with the transaction. Any documents that you want to keep as part of the transaction file can be uploaded here, such as property disclosures, maps, or any other documents.

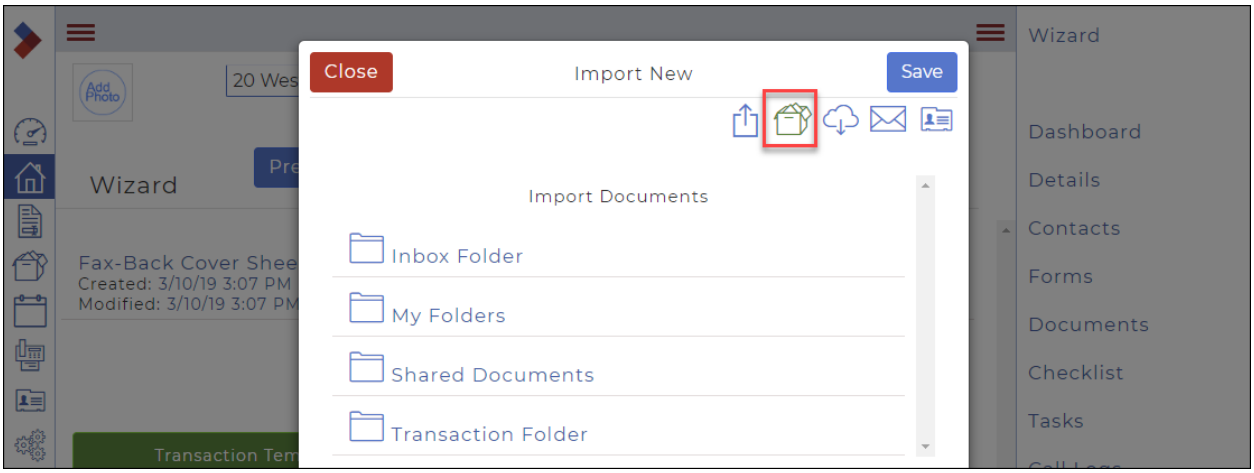


14. Click **Add** to attach a document to the transaction.
    The **Create New** dialog box displays.



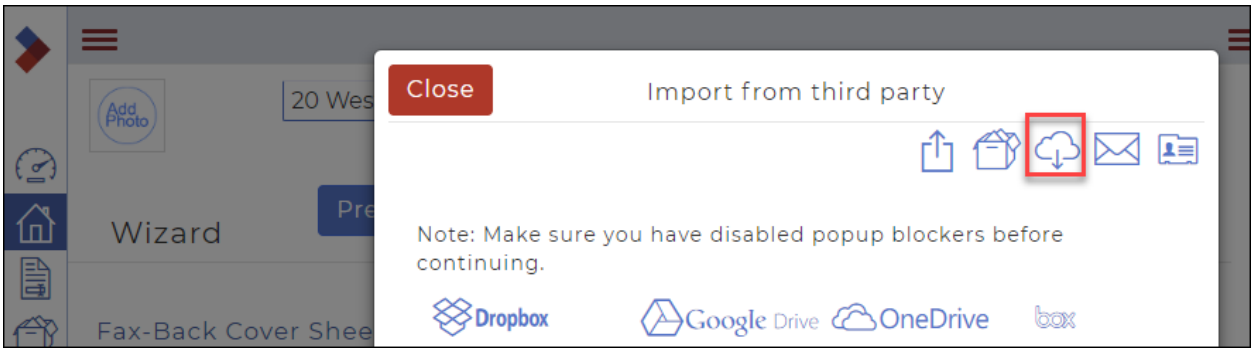
15. Do one or more of the following:
    A. Drag & Drop or Upload
    - Drag and drop files from your computer to the **Drag & Drop files here** area, or
    - Click the blue bar to browse for the document(s) you want to upload, or
    - Click **Upload Document** .

    B. Documents Folder
    - Click **Documents** to copy documents from your documents folder.
    - Navigate to and select the appropriate document(s).
    - Click **Save**.



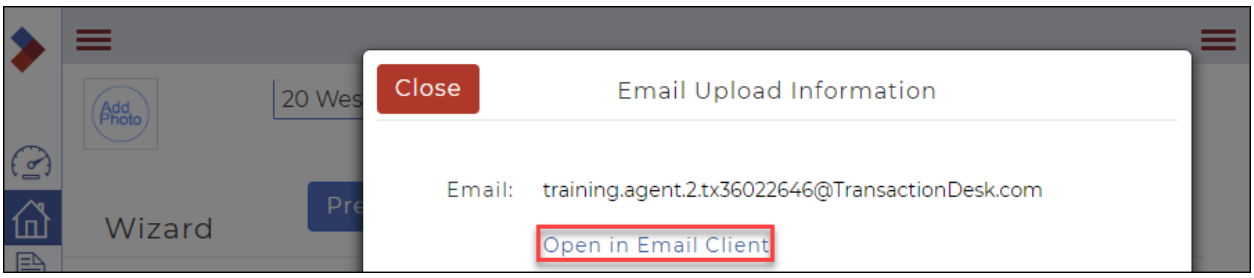
C. Import from third party

- Click **Import from third party** to import a document from Dropbox, Google Drive, or another third-party document storage system.
- Select the appropriate third-party document storage system and locate the document.
- Click **Add**.

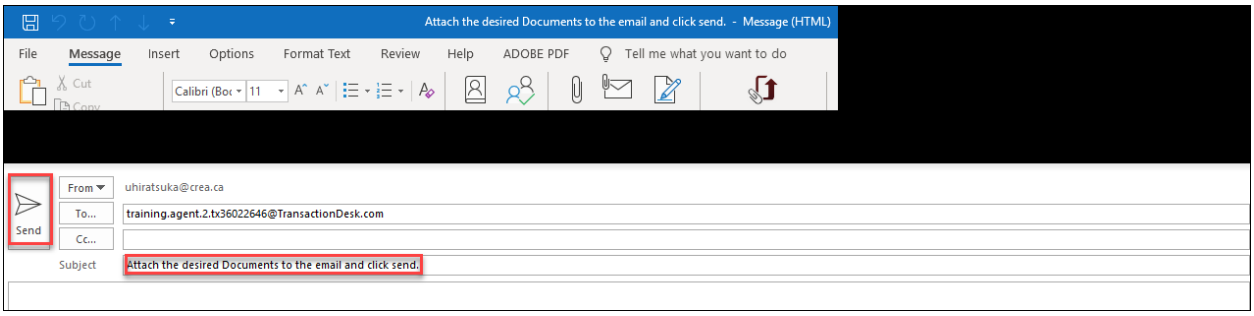


D. Email

- Click **Email upload** to upload a document from your email account
- The **Email Upload Information** dialog box displays.

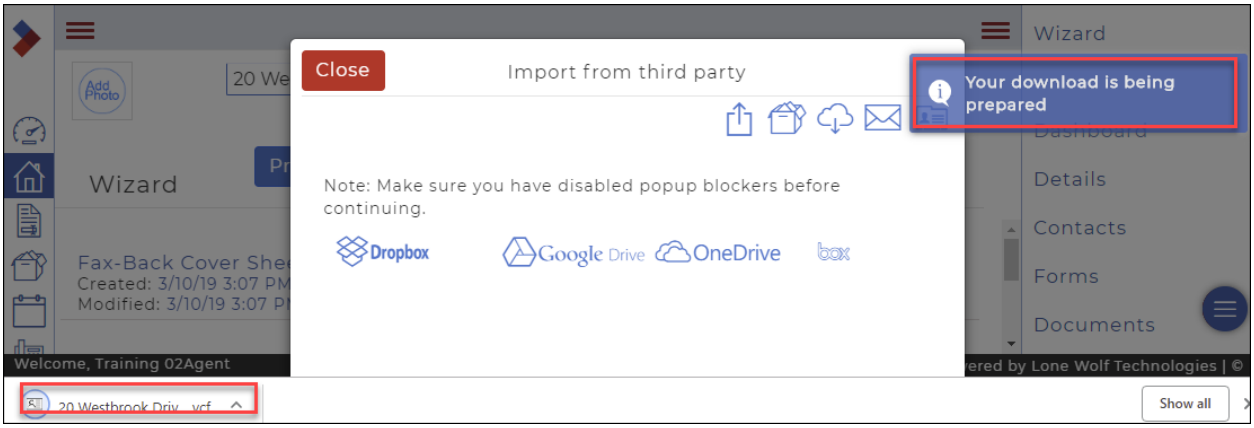


- Click **Open in Email Client**.
- Locate the document.
- Click **Send**.

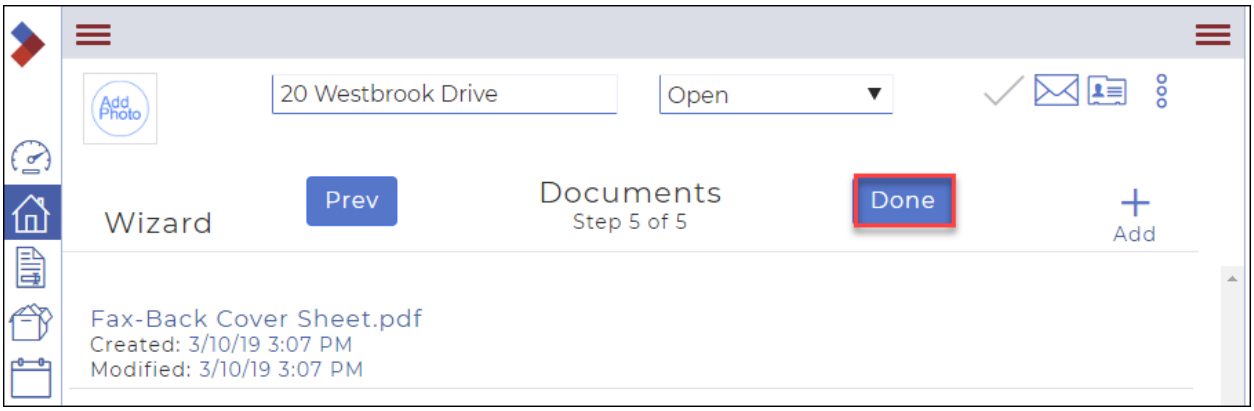


E. Download Contact Card

- Click **Contact Card** to download a contact card for the transaction, so that you can email documents directly to the transaction.
- This adds an email contact to your email. In future, you can email documents directly to this contact, and the documents are attached automatically to the transaction.



16. Click **Done**. (You may have to first click **Close** or **Save** to close the **Create New** dialog box.



The transaction is added to the list of transactions in the system.

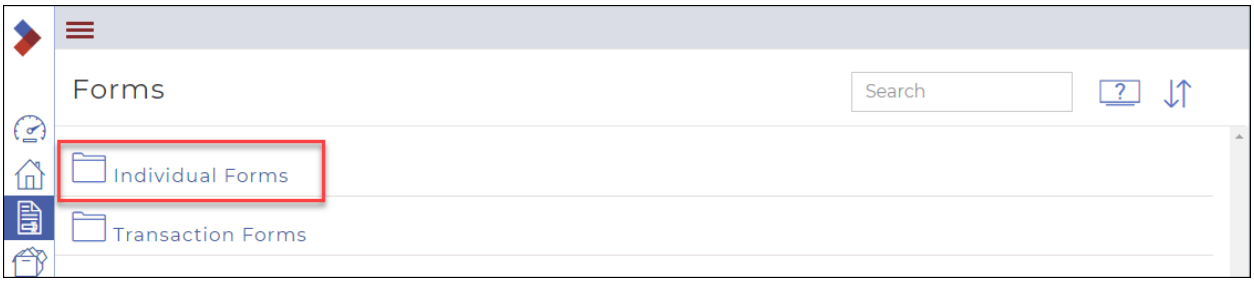
Creating a new transaction from a form

You can create a new transaction from an individual form.

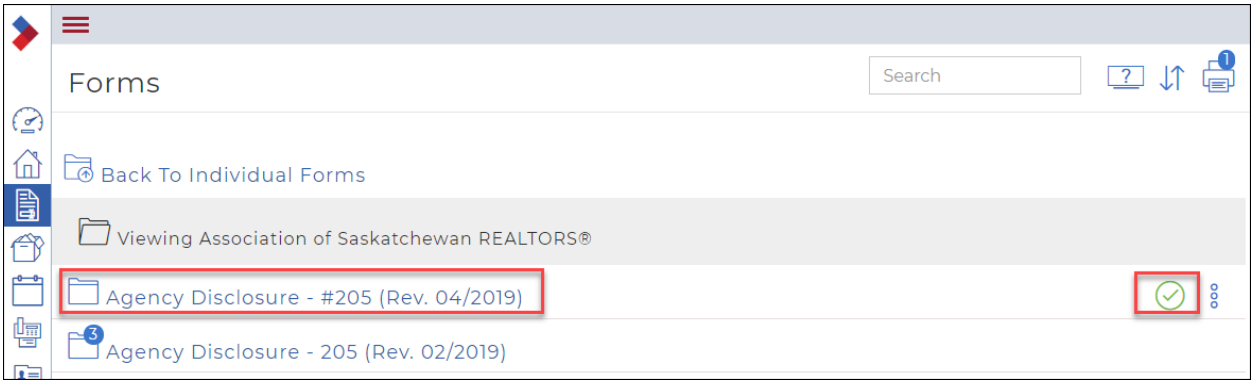
CLICK TO VIEW VIDEO

To create a new transaction from a form:

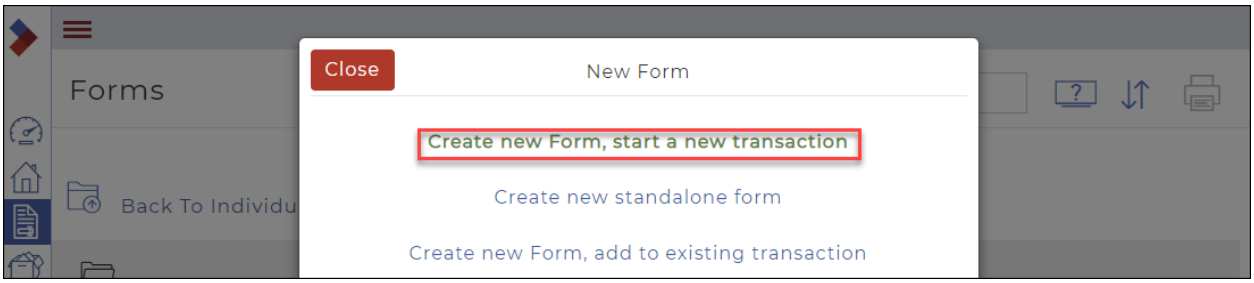
1. Click **Forms** and locate the form you need in the **Individual Forms** folder.



2. Click the **Circle** beside the form you want to use.

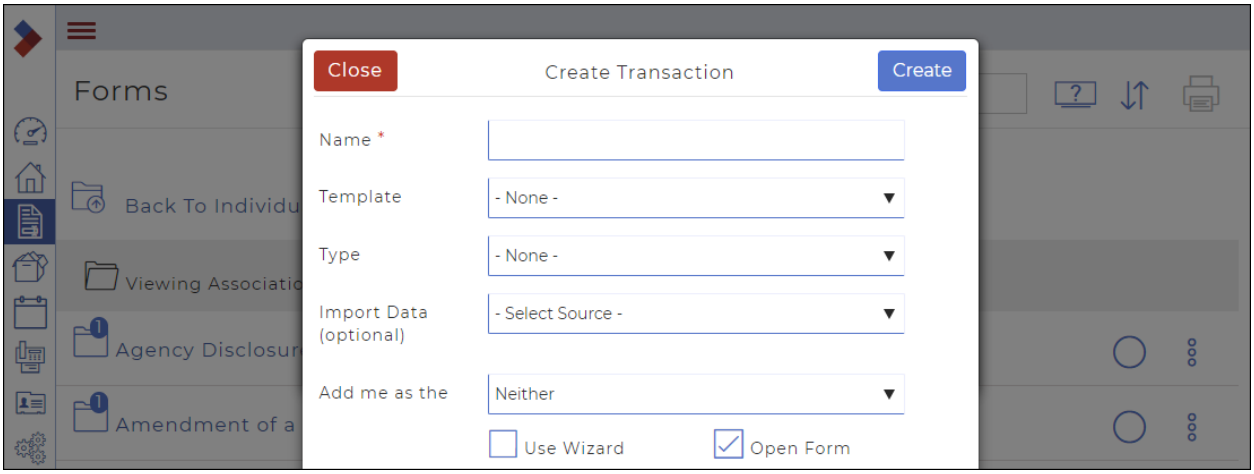


3. Click **New**.
   The **New Form** dialog box displays.

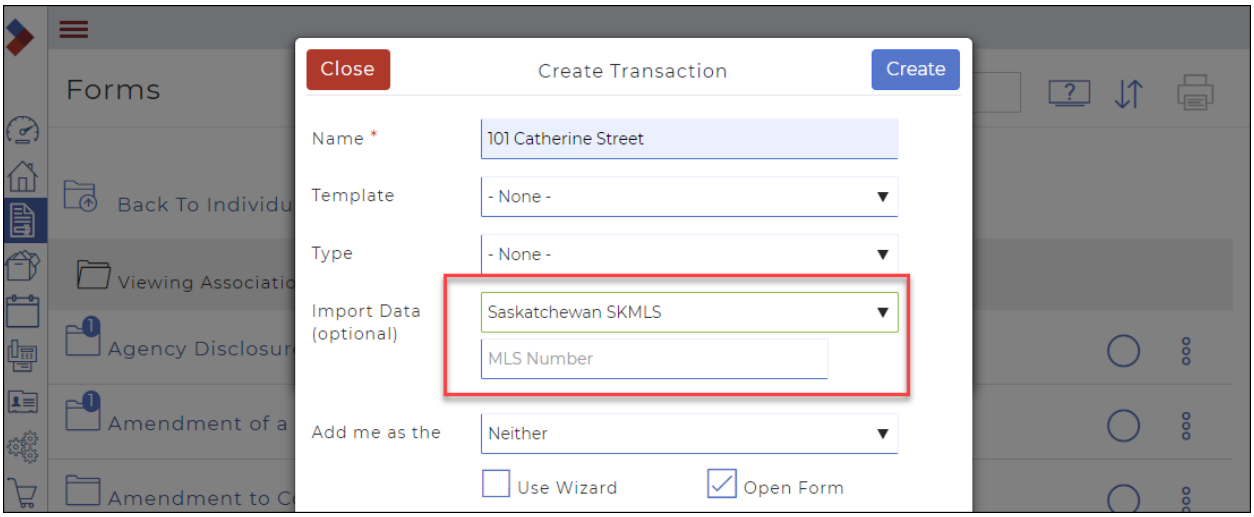


4. **Click Create new Form, start a new transaction**.

   The **Create Transaction** dialog box opens.



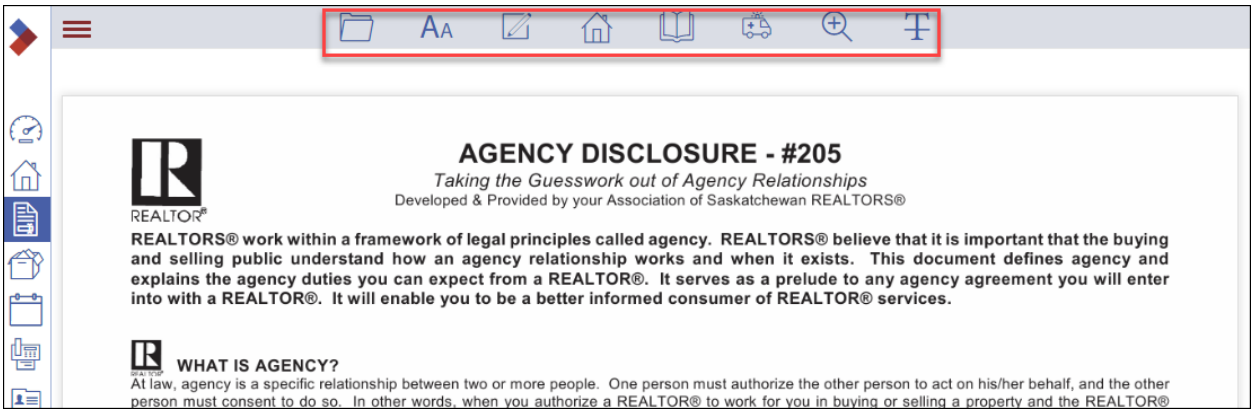
5. Follow the instructions under *Creating a Transaction* to complete the steps.
6. In the **Name** field, enter a name for the transaction. Typically, this is the street address of the property.
    - Optional: Use the **Template** dropdown to select the appropriate template to automatically add a checklist, forms, and documents. If you have not yet created any templates, the option is not available. Consider creating a template first.
    - Optional: Use the **Type** dropdown to select the type of Transaction.
    - Optional: Use the **Import Data** dropdown to select the MLS® System listing as a source of information for the transaction. First click the Select Source dropdown to select a source. Additional fields display.



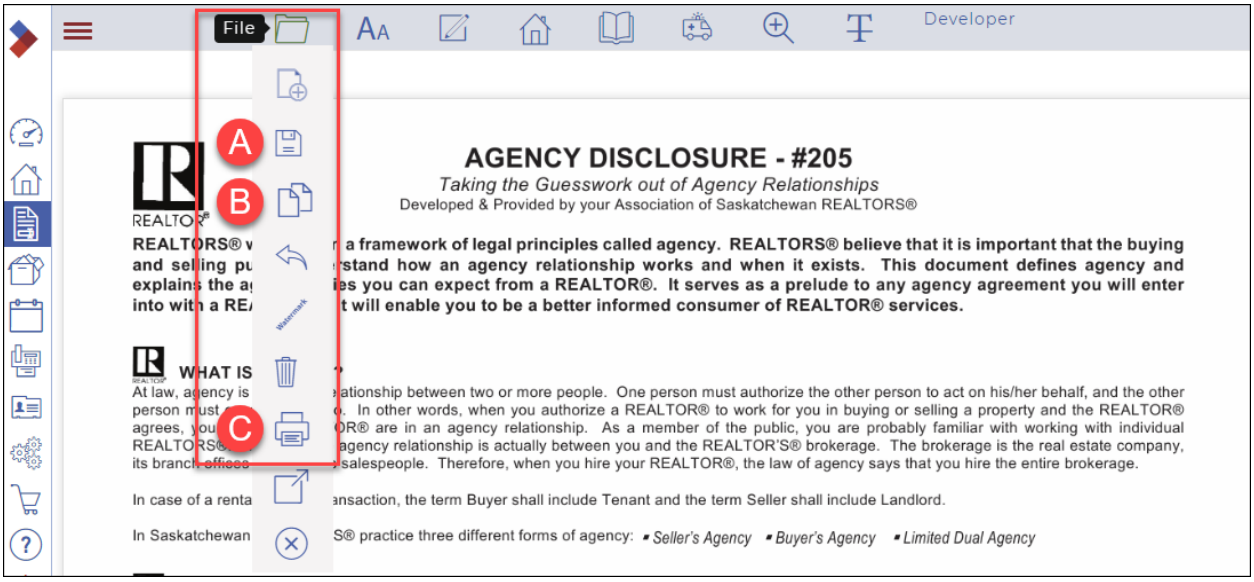
7. In the MLS Number field, specify the MLS® System number of the listing.
    - Optional: Use the Add me as the dropdown to select your role in the transaction. Choose from Listing Agent, Selling Agent, Neither, or Both.

    Caution: You and other contacts may already be automatically added. Check your Contacts.

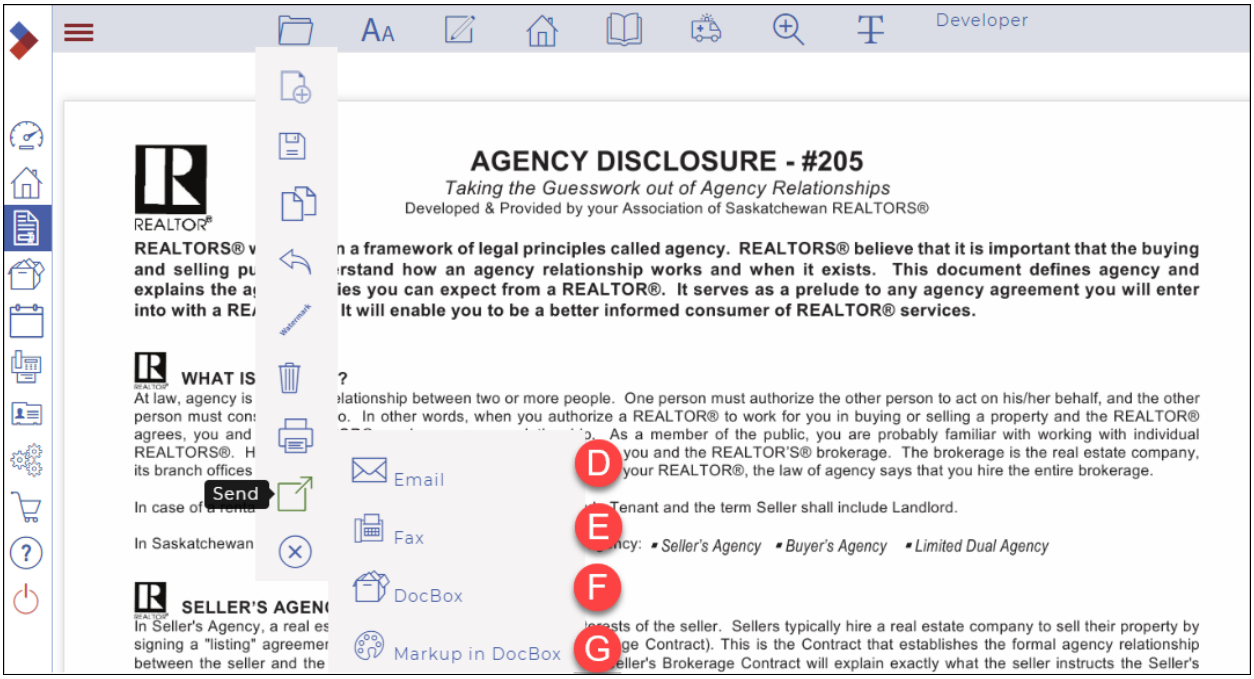
8. Click **Create**.
9. The selected form opens in the form editor.



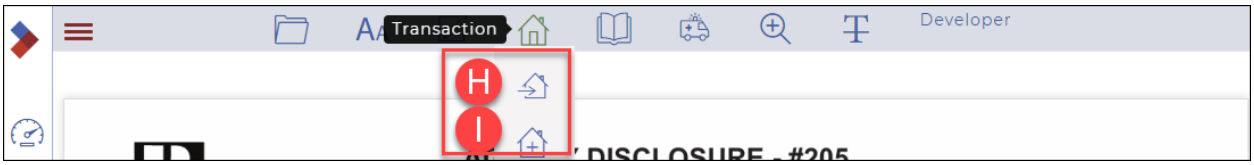
10. Use the available form editor options to pre-populate your form's fields with information. See "*Editing a Form*" for more information on each form editor option.
11. When you are finished setting up your form, in the form editor options, do one of the following:



J. Click **File > Save** if you need to save the form to the list of forms.
K. Click **File > Copy** if you need to copy the form.
L. Click **File > Print** if you need to print the form.



M. Click **File > Send > Email** if you need to send the form as part of an email. See "*Emailing a Form*" for more information.
N. Click **File > Send > Fax** if you need to send the form as part of a fax. See "*Faxing a Form*" for more information.
O. Click **File > Send > Document** if you need to save the form to a Document folder.
P. Click **File > Send > Markup in Documents** if you need to mark up the form. See "*Marking Up a Document*" for more information.



Q. Click **Transaction > Add to** to add the form to an existing transaction.
R. Click **Transaction > Start New** to add the form to a new transaction.

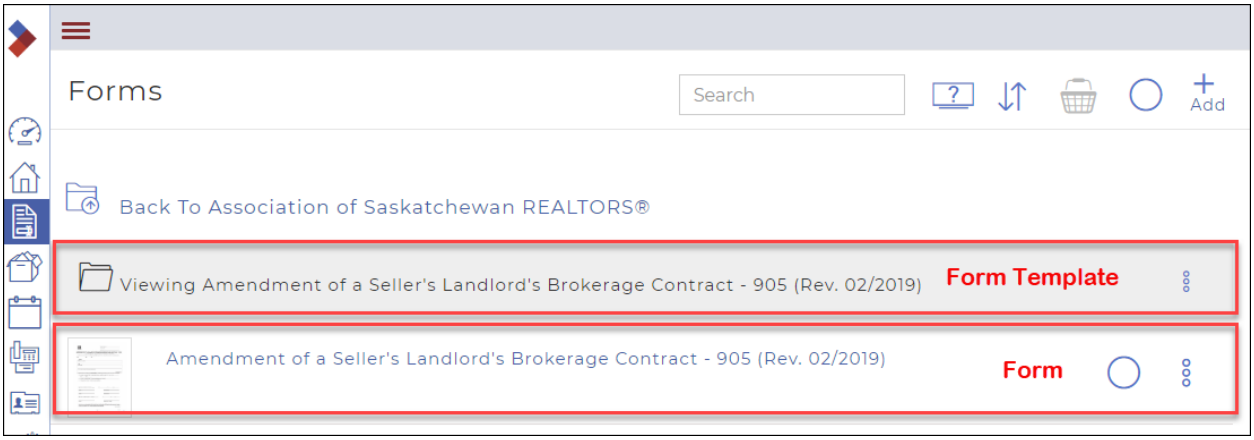
Creating a form and adding it to an existing transaction

Create a form when you need an interactive, digital, legal document provided by your board to conduct your business.

You can create forms out of the existing form templates downloaded from your board and add them to transactions. For example, you can create an agreement of purchase and sale form out of your agreement of purchase and sale form template and add it to your transaction.

Note: You can only create a "New" form from the template forms in the Individual Forms folder, not the Transaction Forms folder.
Note: In the Individual Forms folder, be sure to click a Form Template, not an actual form, to display the New form dialog.

See Creating a form and adding it to an existing transaction



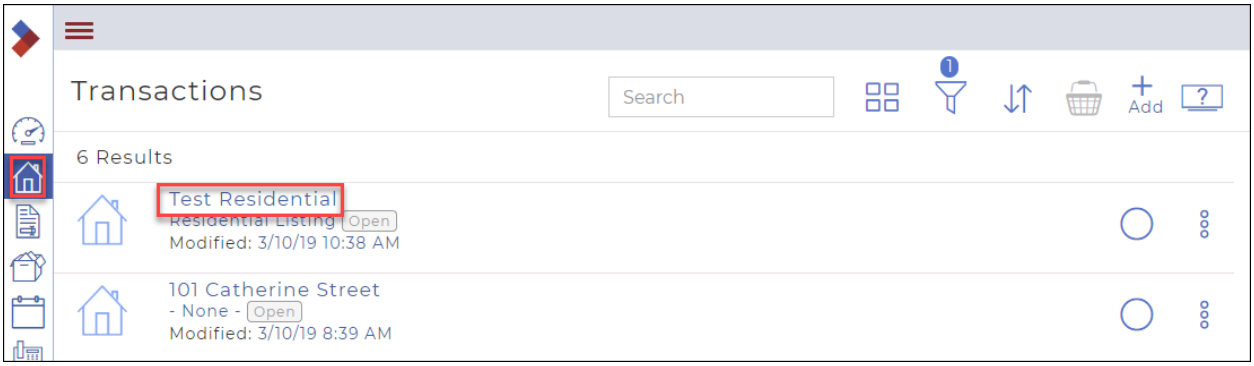
Editing a transaction

You can make changes to a transaction, including adding or updating a document, changing a contact, updating a photo, or updating transaction dates.

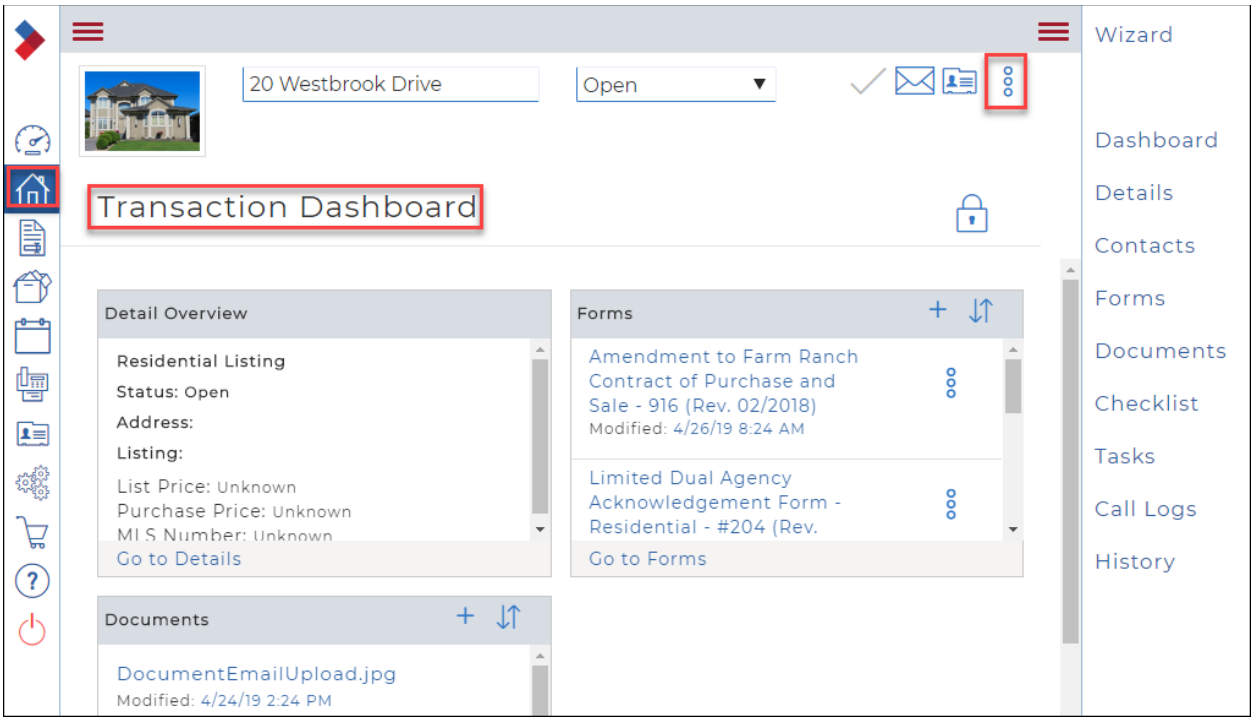
CLICK TO VIEW VIDEO

To edit a transaction:

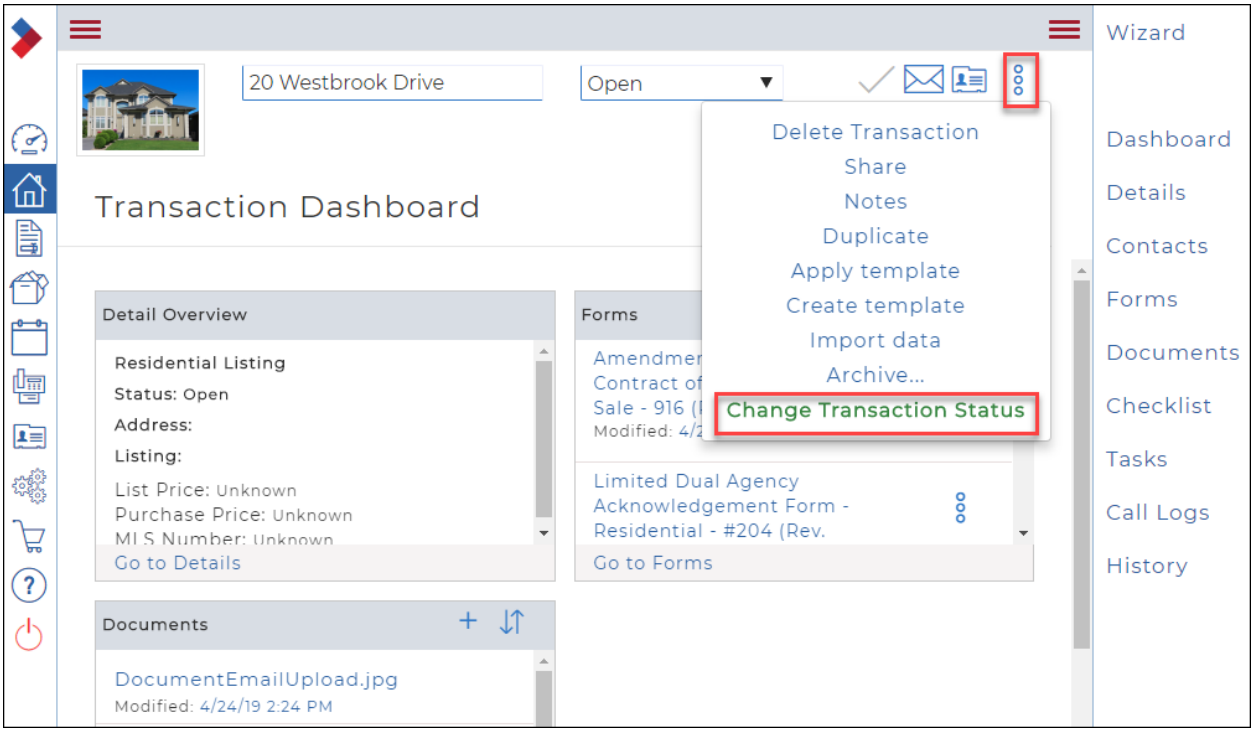
1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



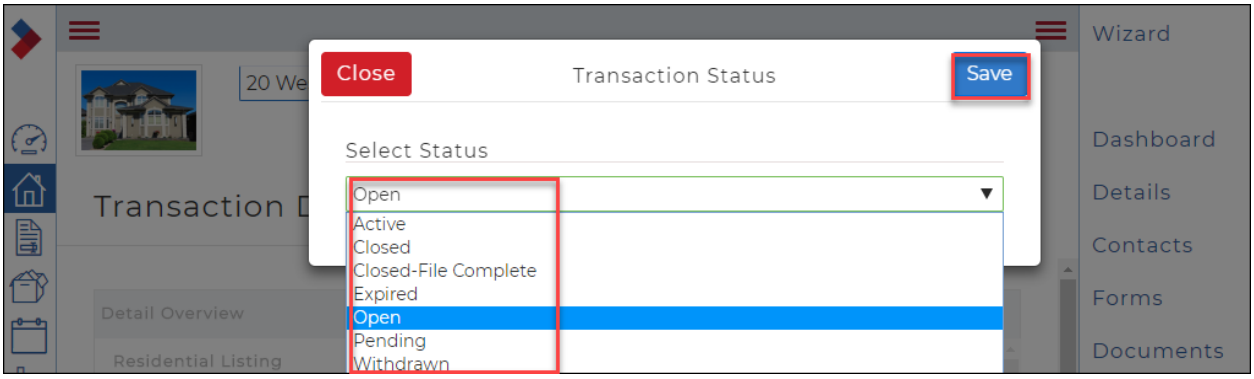
2. Click the transaction name to open the transaction.
   Your **Transaction Dashboard** displays.



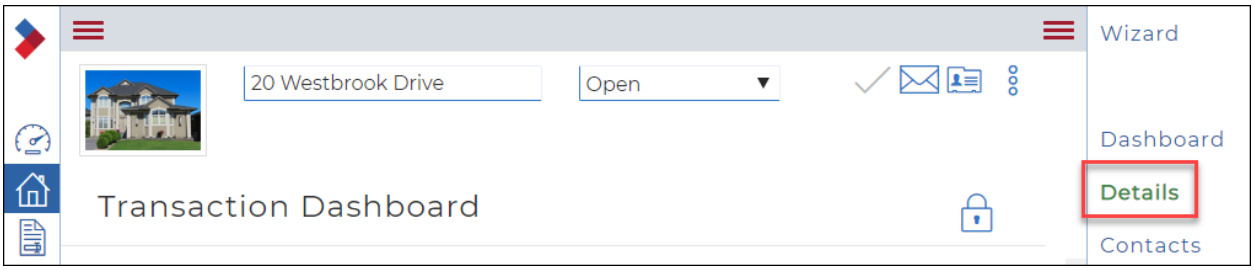
3. Click the **Ellipses Menu** ⋮ at the right top of the window.
   A dropdown menu displays several actions, along with the options on the right-hand menu.
4. Click **Change Transaction Status** in the dropdown menu to change the status of the transaction.



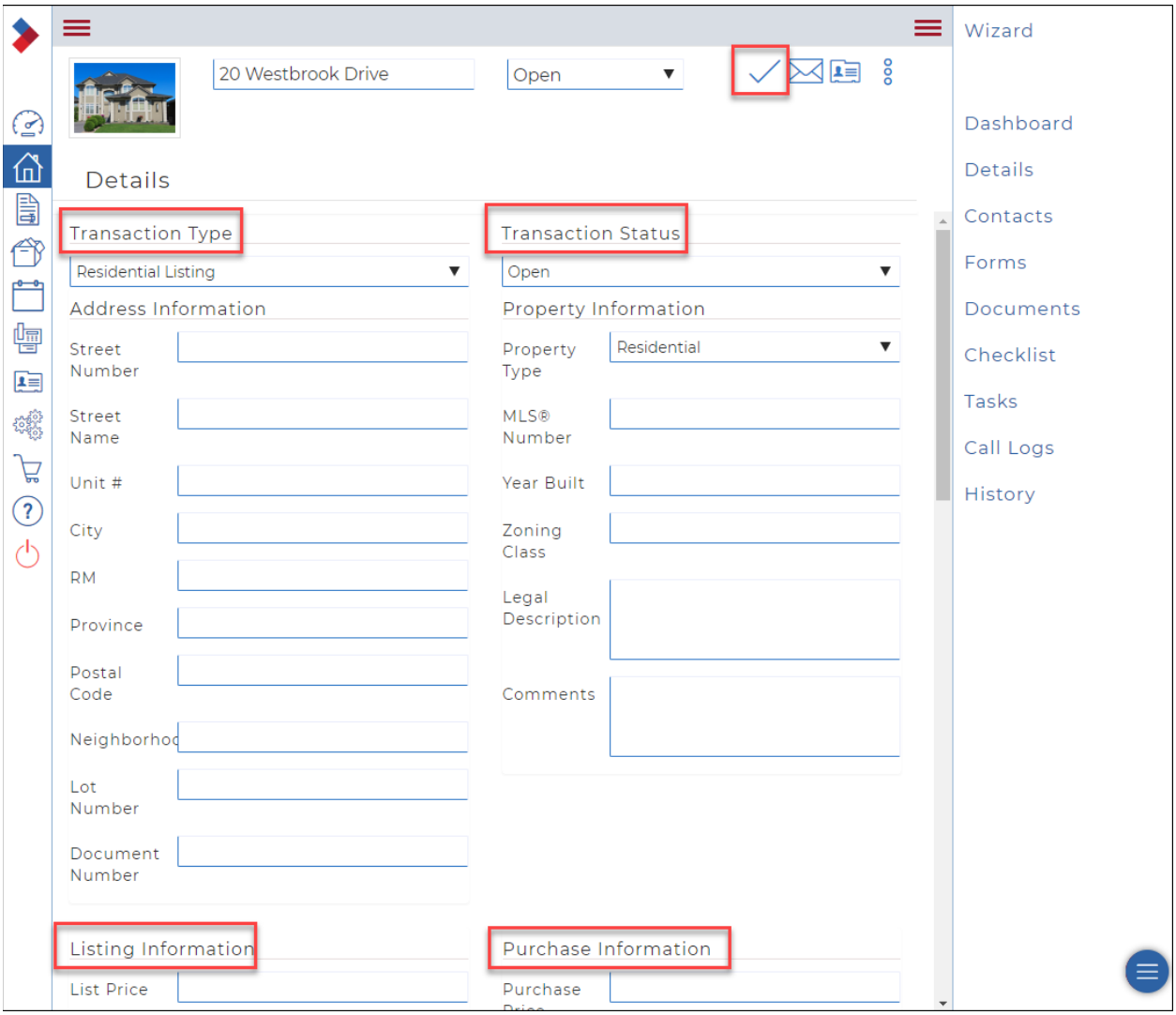
- Select the appropriate status.



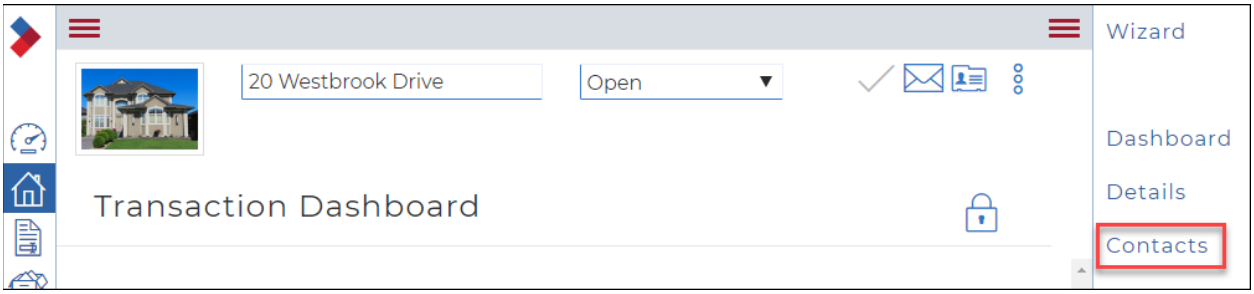
- Click **Save**.
  The **Transaction Dashboard** displays.



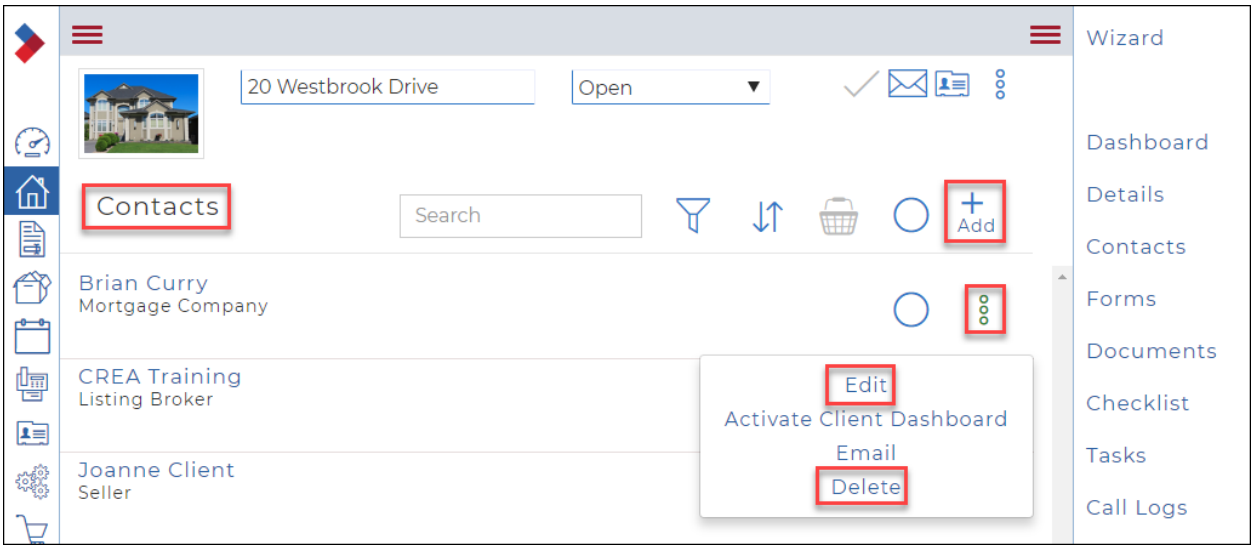
5. Click **Details** in the right-hand menu to edit the transaction details.
   The **Details** window displays.



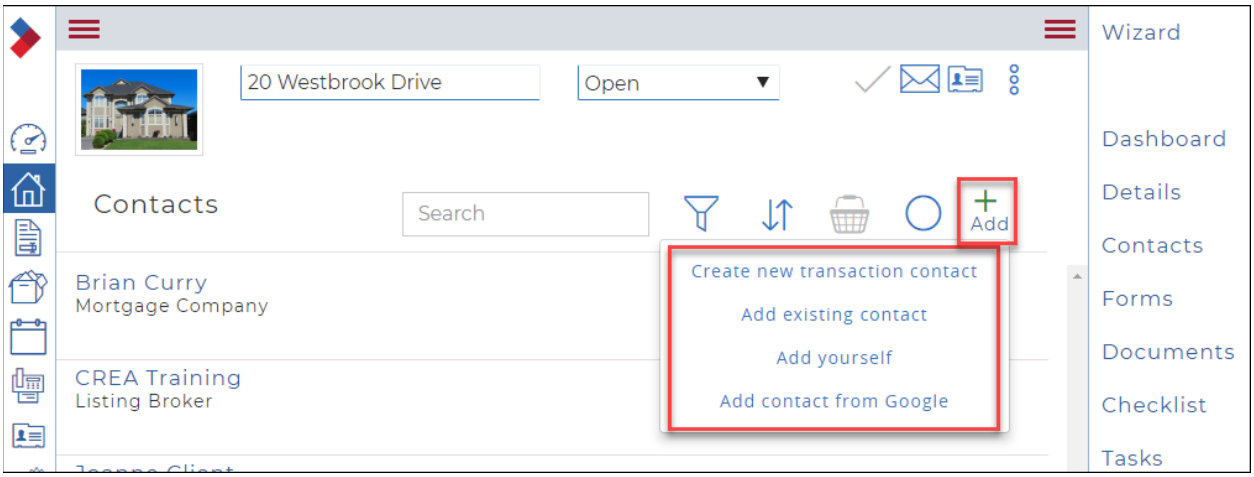
- You can edit details such as address, property information, listing information, purchase information, or dates
- Scroll down to see all the fields. Make your changes.
- Click **Save** ✓ at the top of the window.

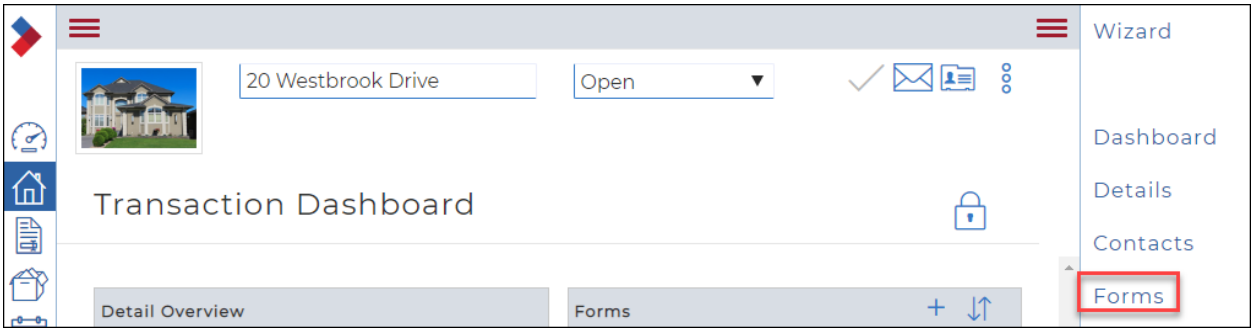


6. Click **Contacts** in the right-hand menu to edit, add, or delete a contact.
    - To edit or delete a contact, click the **Ellipses Menu** ⋮ .

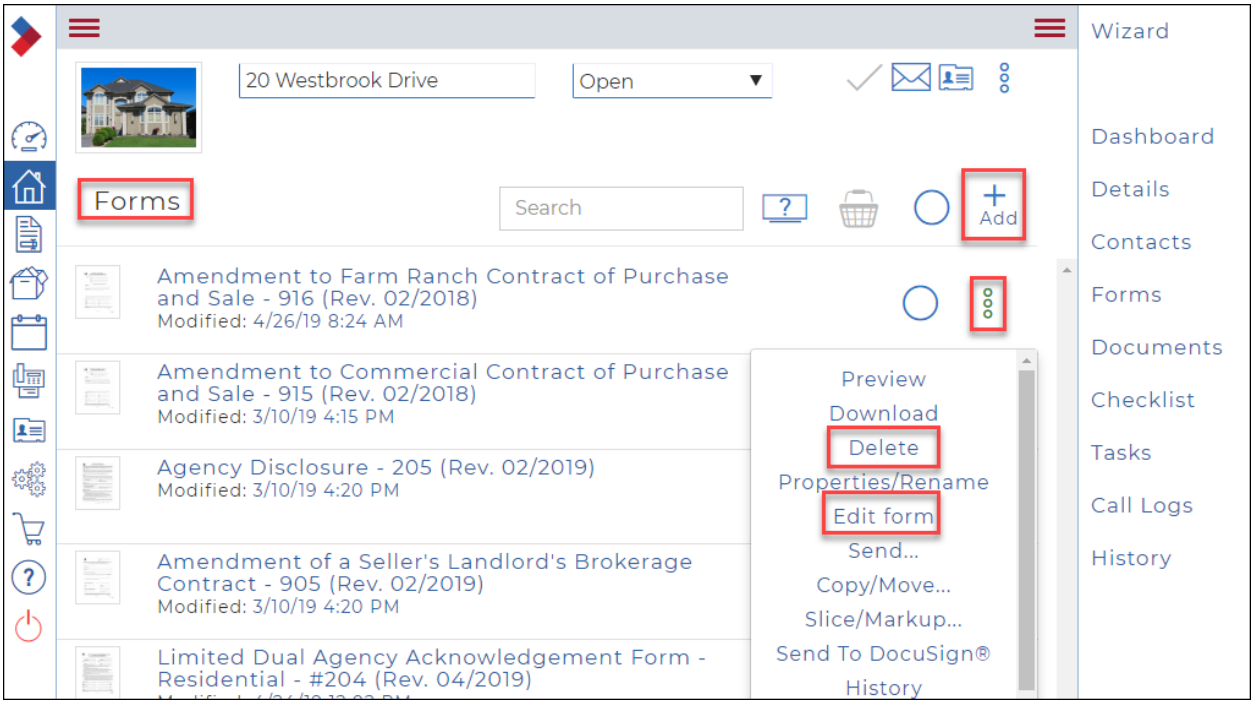


- from the dropdown, select **Edit** or **Delete** respectively.
- To add a contact, click **Add** and fill in the contact information.

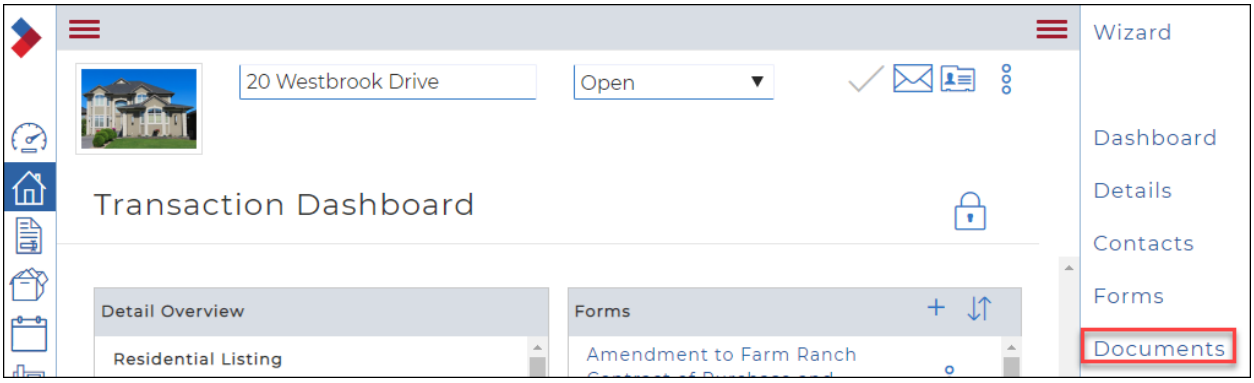




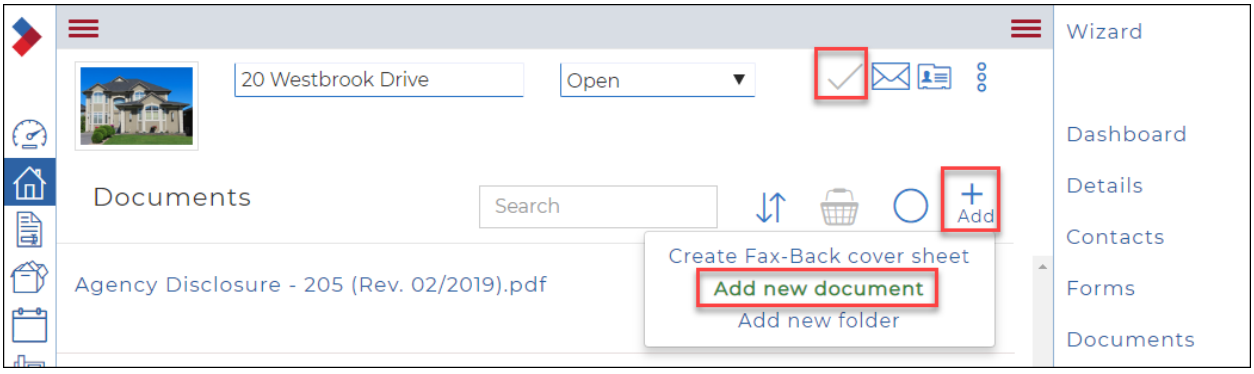
7. Click **Forms** in the right-hand menu to edit, add, or delete a form.
    - To edit or delete a form, click the **Ellipses Menu** ⋮ .



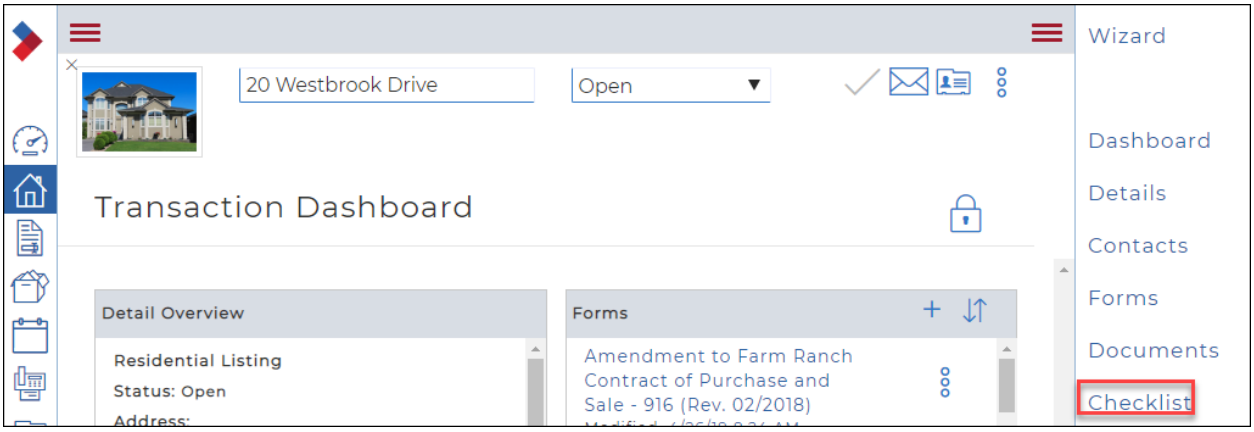
- from the dropdown, select **Edit** or **Delete** respectively.
- To add a form, click **Add**.
- Locate and select the form to add.
- Click **Add**.



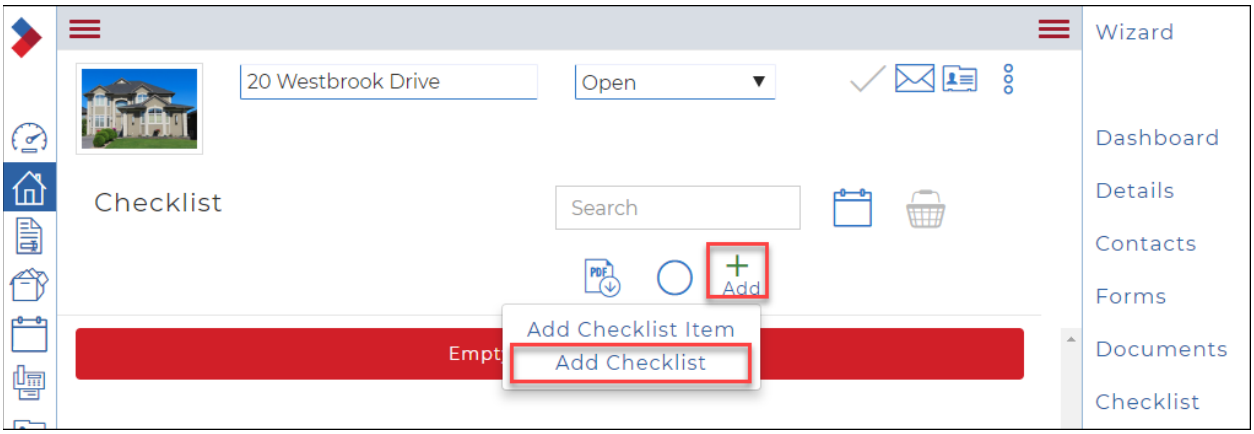
8. Click **Documents** in the right-hand menu to add a document.
    - To add a document, click **Add > Add new document**.



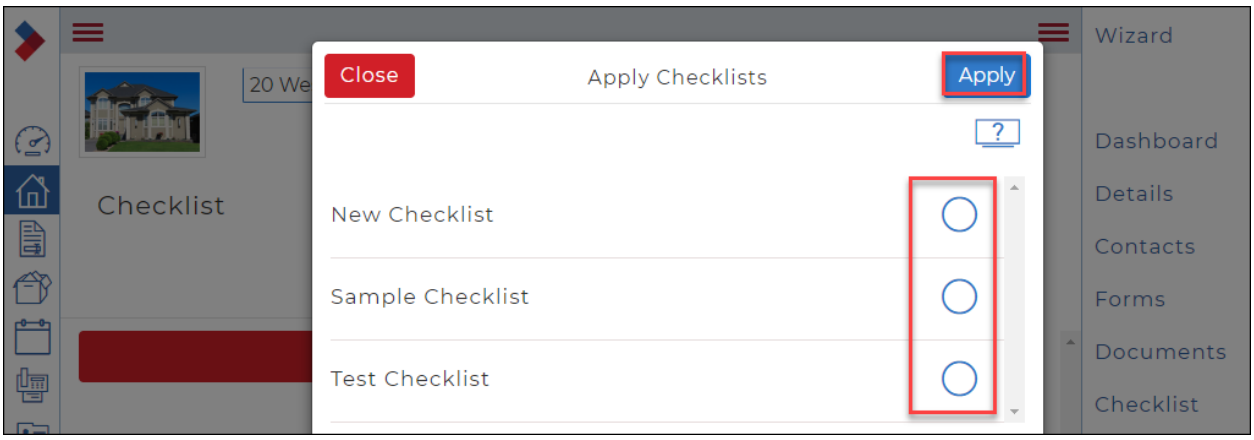
- Upload the document.
- Click **Save**.



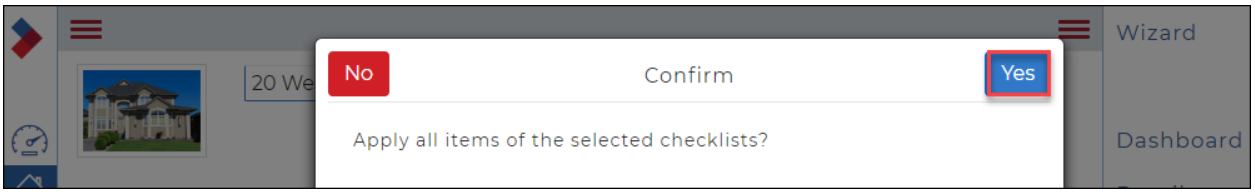
9. Click **Checklist** in the right-hand menu to apply a checklist to a transaction.



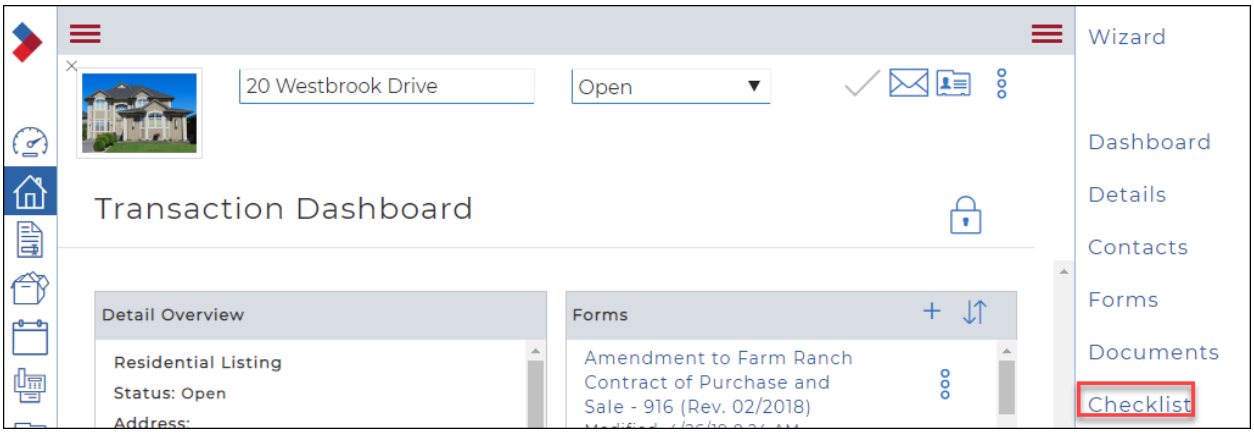
- Click **Add > Add Checklist**.
- Select the checklist from the list provided by checking to the right of the list.



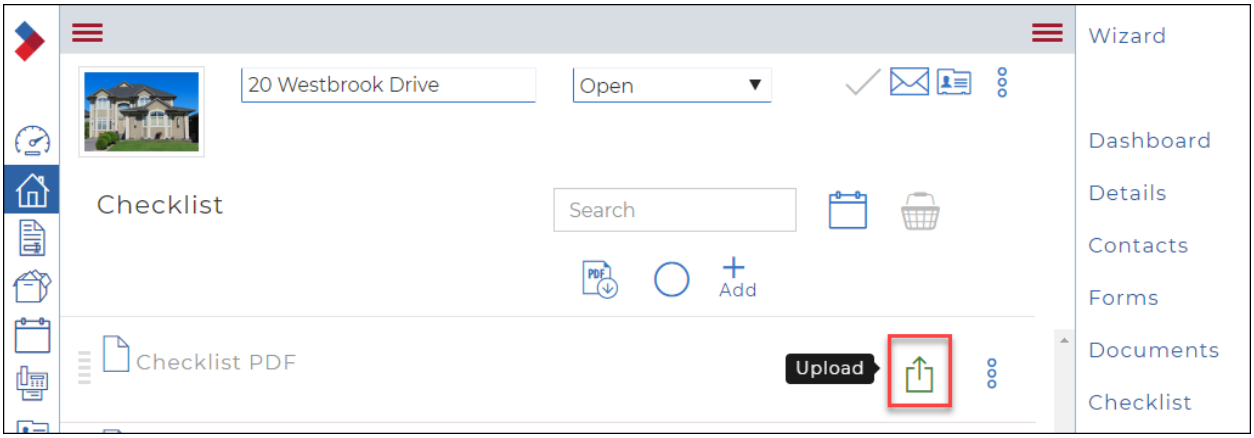
- Click **Apply**.



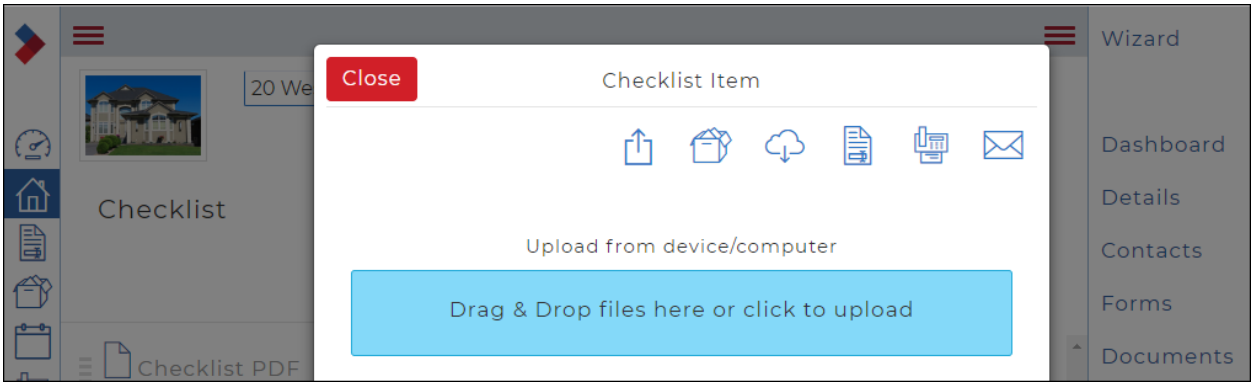
- Click **Yes** to apply all items in the selected checklist.



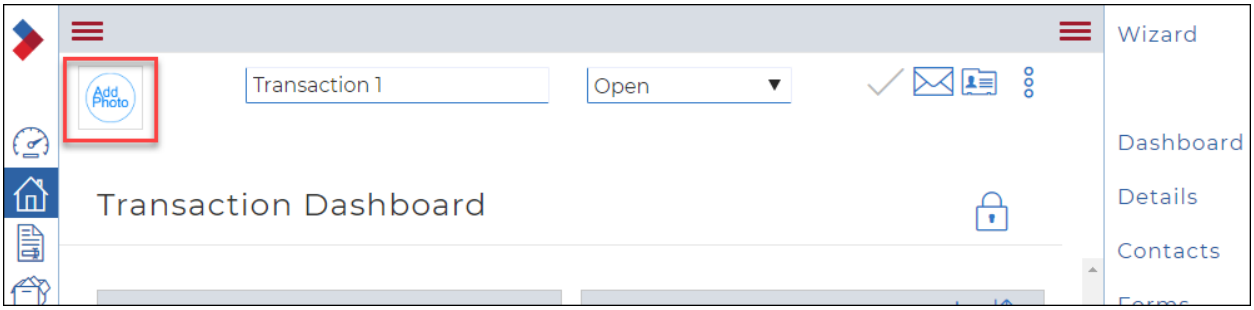
10. Click **Checklist** in the right-hand menu to upload a document to an item in the transaction checklist.



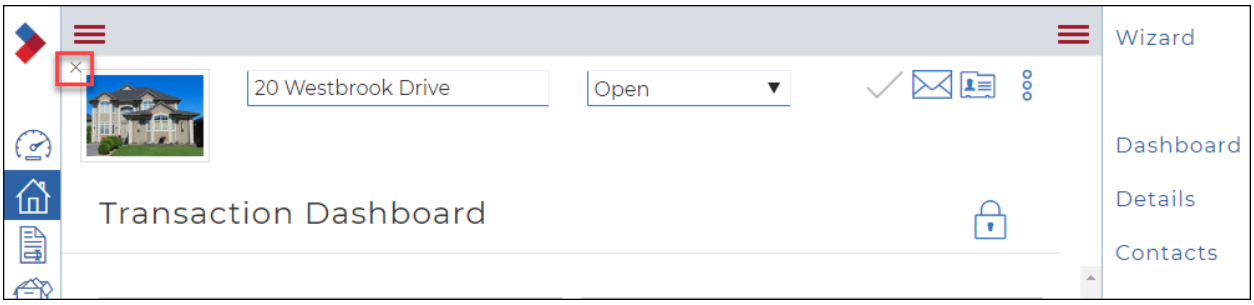
- Locate the checklist item that is waiting for the document and click **Upload** .



- Upload the document.



11. Click **Add Photo** on the top left to add a thumbnail photo.
    - Select the photo from your computer and double-click it.



12. To change the thumbnail photo, in the top left, hover over the photo, and click the X that displays next to the photo. This deletes the existing photo.
    - Click **Add Photo** .
    - Select the photo from your computer and double-click it.

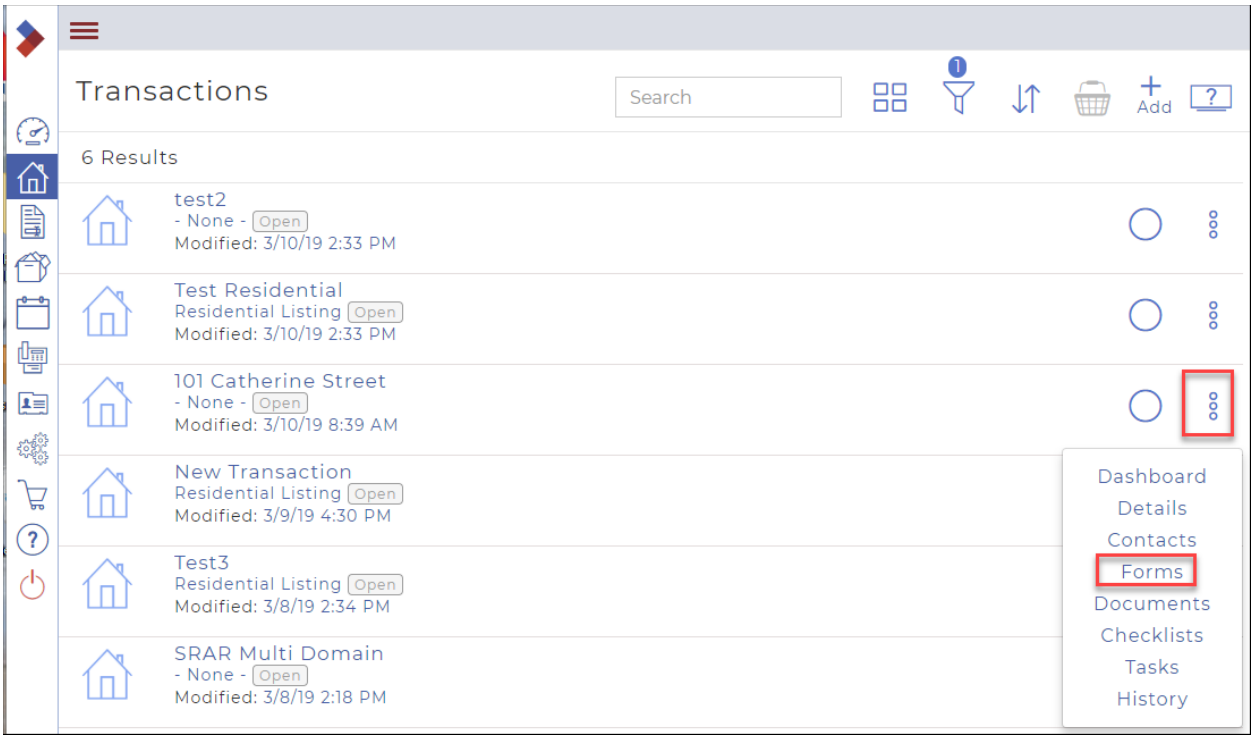
Attaching a form(s) to an existing transaction

You may have a form in your forms library that is not included automatically in transactions as part of a checklist. You can easily add this form to an existing transaction. You can also use this form to create a new transaction.

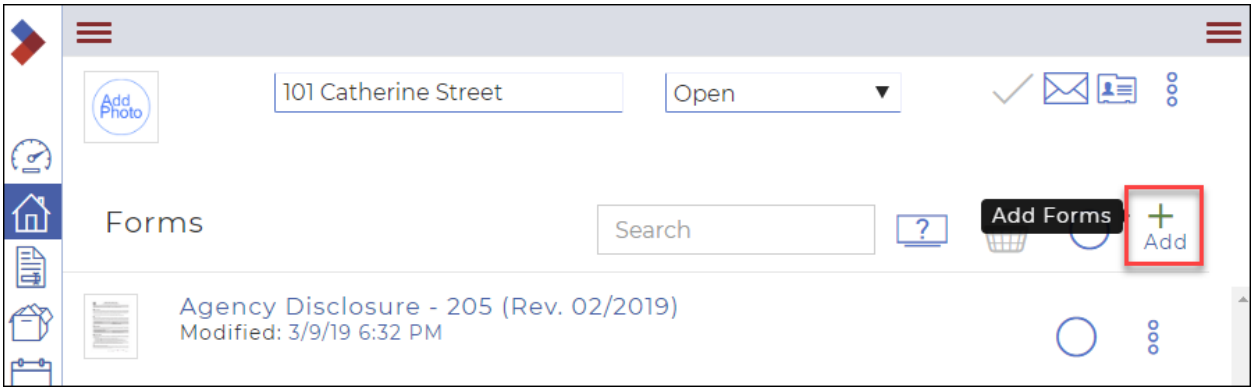
CLICK TO VIEW VIDEO

To attach a form(s) to an existing transaction:

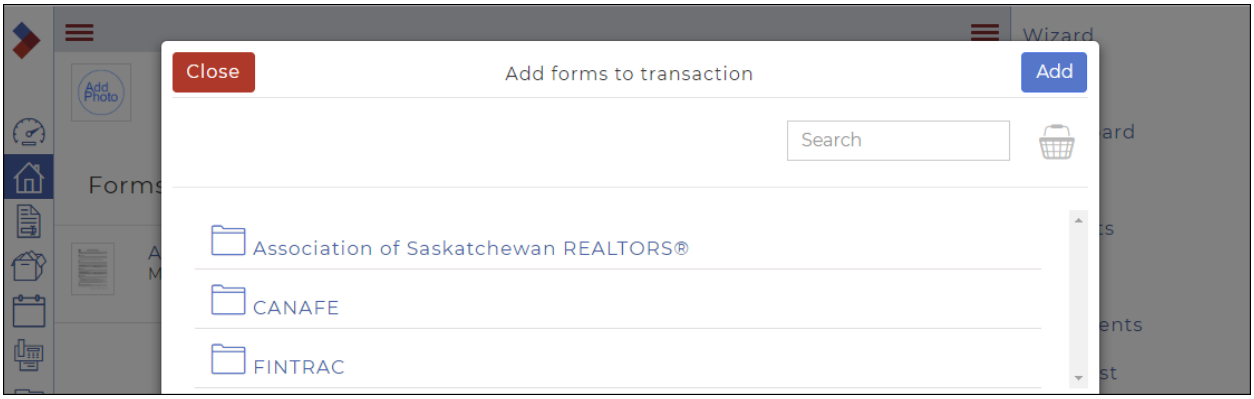
1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



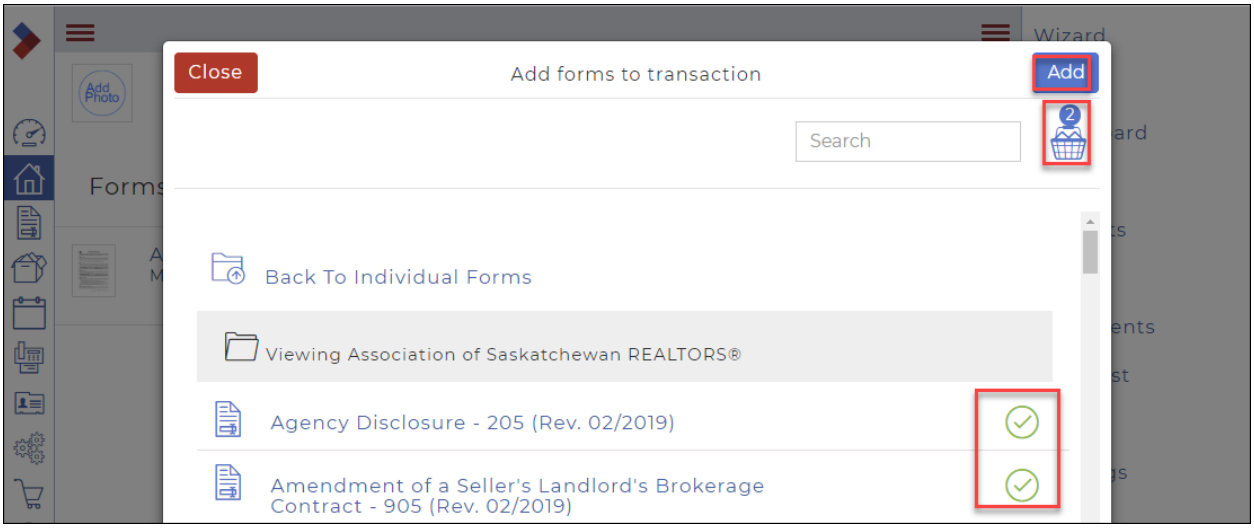
2. Click the **Ellipses Menu** ⋮ to the right of the transaction that you want to add the form to.
   A dropdown menu displays.
3. Click **Forms**.
   The list of Forms that are attached to the transaction displays.



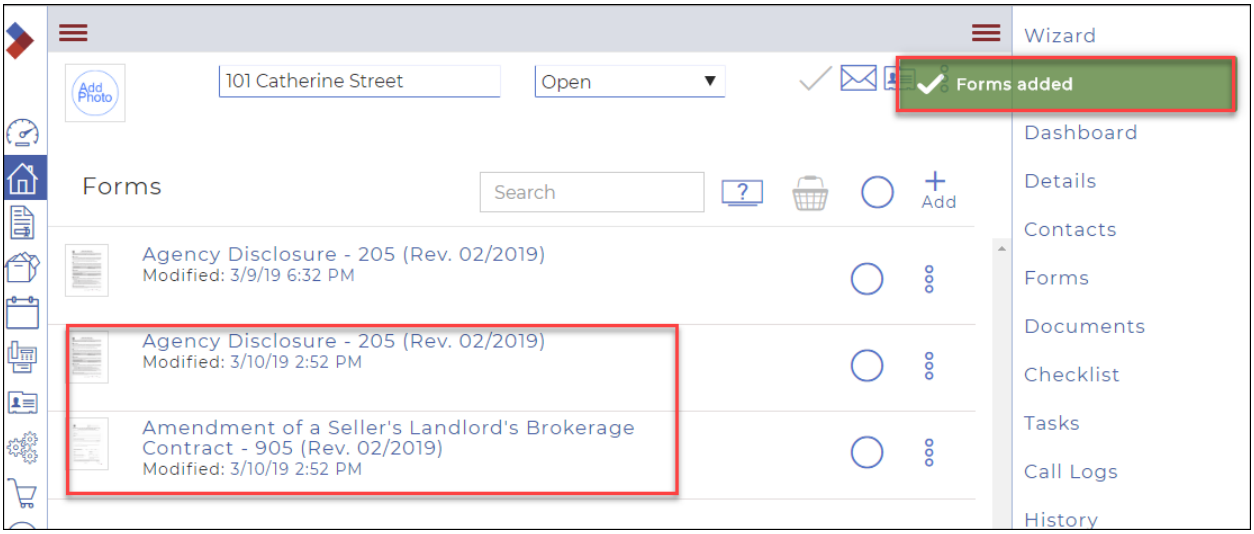
4. Click **Add**.
   The **Add forms to transaction dialog box** displays, showing the contents of the **Individual Forms** folder.



5. Navigate through the folders to the form(s) you want to attach. Click in the circle to select the form(s). The form(s) will be added to your basket.



6. Click **Add**.
   A message briefly displays in the top right corner confirming that your forms have been added, and you are returned to the forms for that transaction.



Applying a template to an existing transaction

See Applying a template to an existing transaction.

CLICK TO VIEW VIDEO

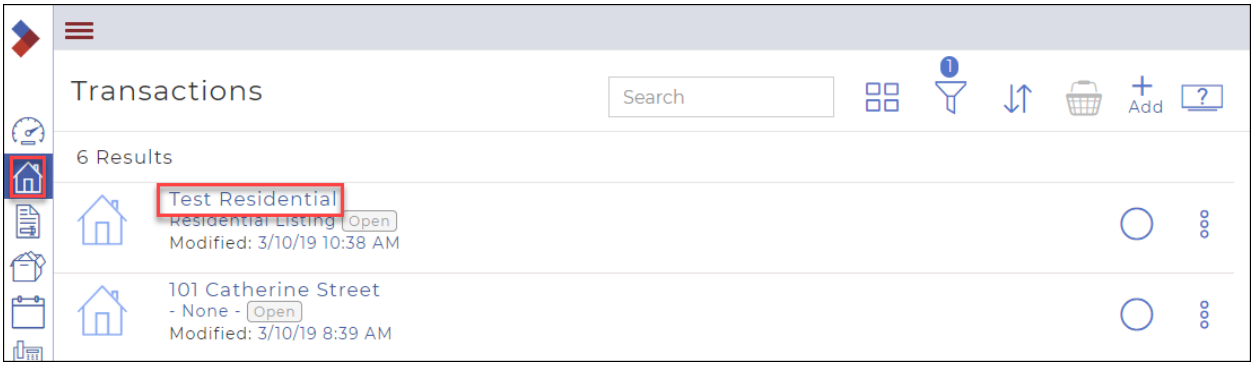
Adding a photo to a transaction

You can display a photo thumbnail for each transaction. Some photos will automatically be added when you autopopulate the transaction using the MLS® system number.

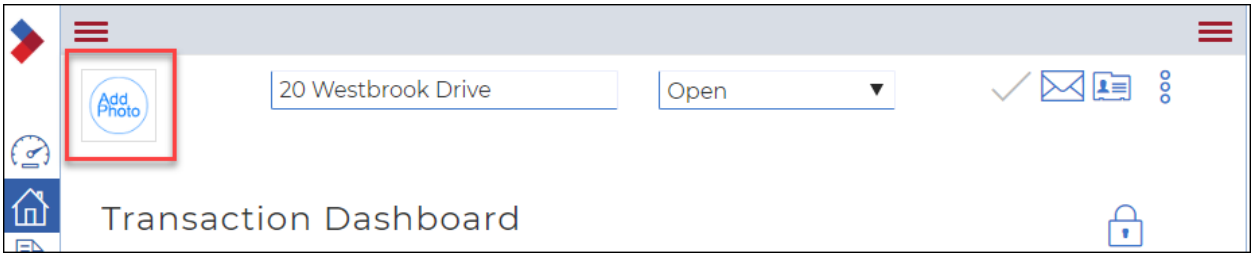
CLICK TO VIEW VIDEO

To manually add a photo to a transaction:

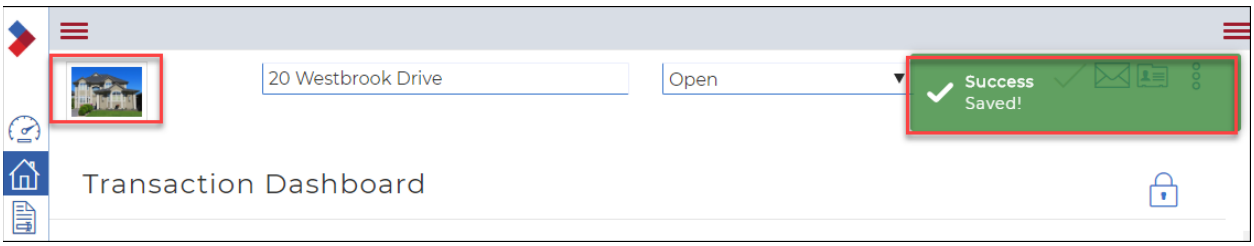
1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



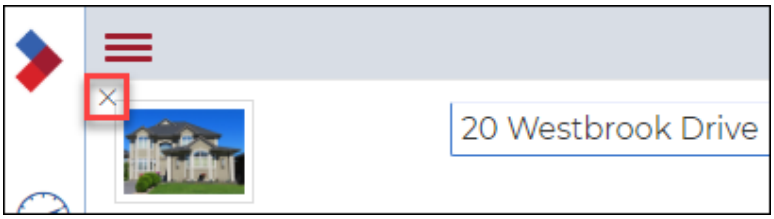
2. Click the transaction name to which you want to add a photo.
   Your **Transaction Dashboard** displays.



3. To add a thumbnail photo, in the top left, click **Add Photo** .
4. Select the photo from your computer and double-click to select it.
   The thumbnail displays.



5. To change the thumbnail photo, in the top left, hover over the photo, and click the X that appears next to the photo. This deletes the existing photo. Now repeat step 4 above to add a new photo.



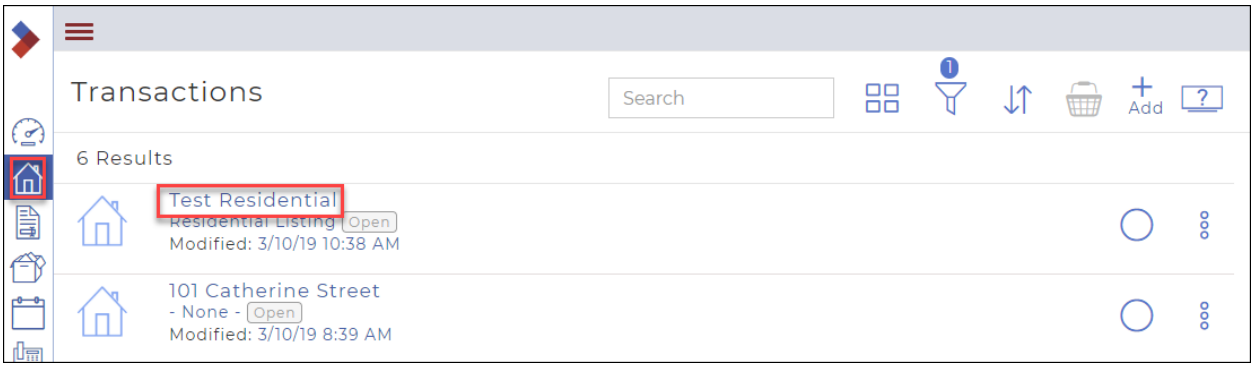
Adding a checklist to a transaction

The checklist provides a list of things you need to do, or documents you need to gather to complete a deal.

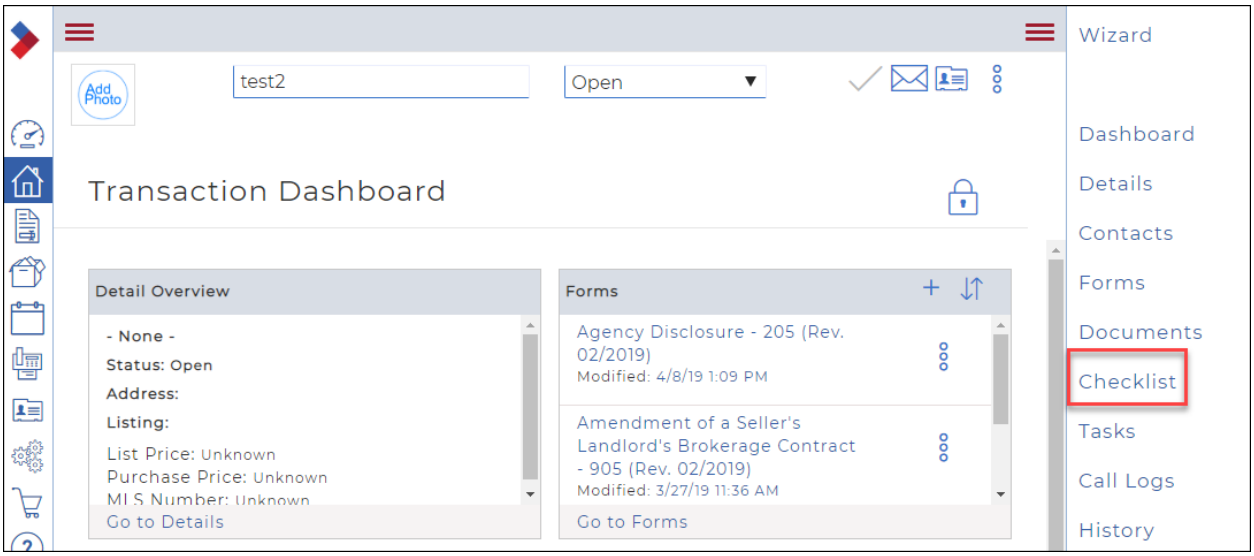
CLICK TO VIEW VIDEO

To add a checklist to a transaction:

6. Click **Transactions** in the Sidebar.
   Your **Transactions** display.

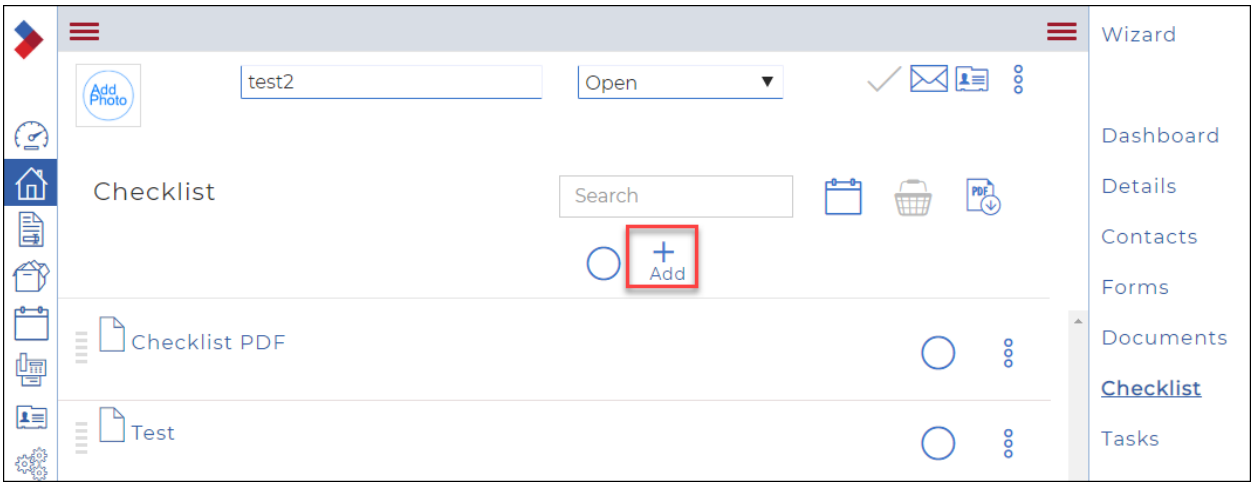


7. Click the transaction name to which you want to add a checklist.
   Your **Transaction Dashboard** displays.

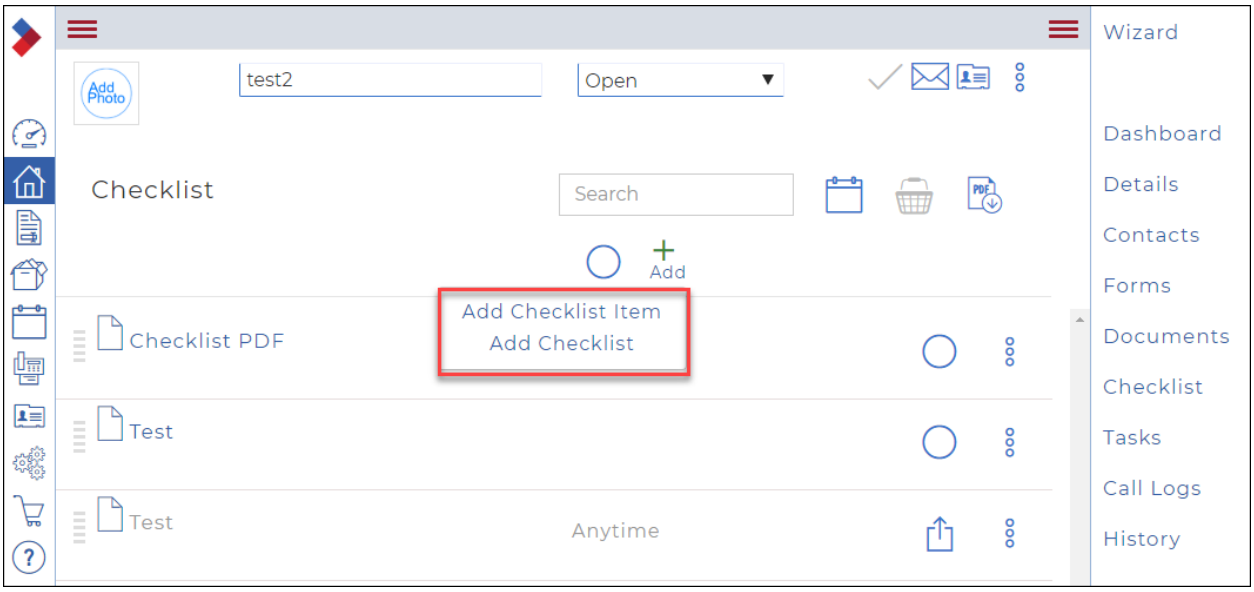


8. In the right menu, click **Checklist**.

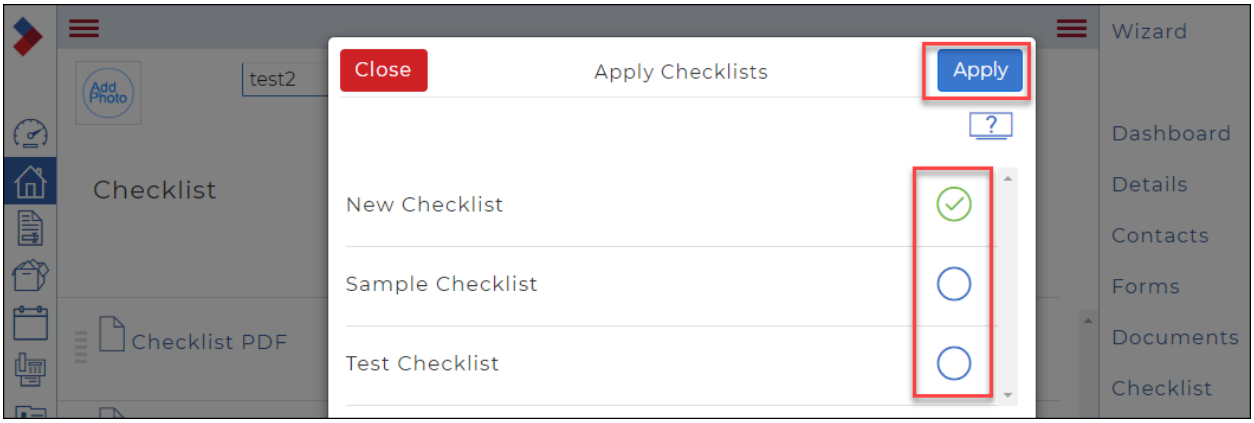
The **Checklist** window displays.



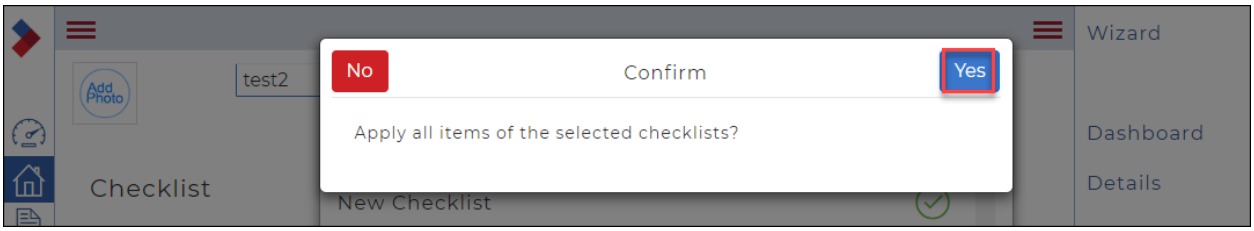
9. Click **Add**.



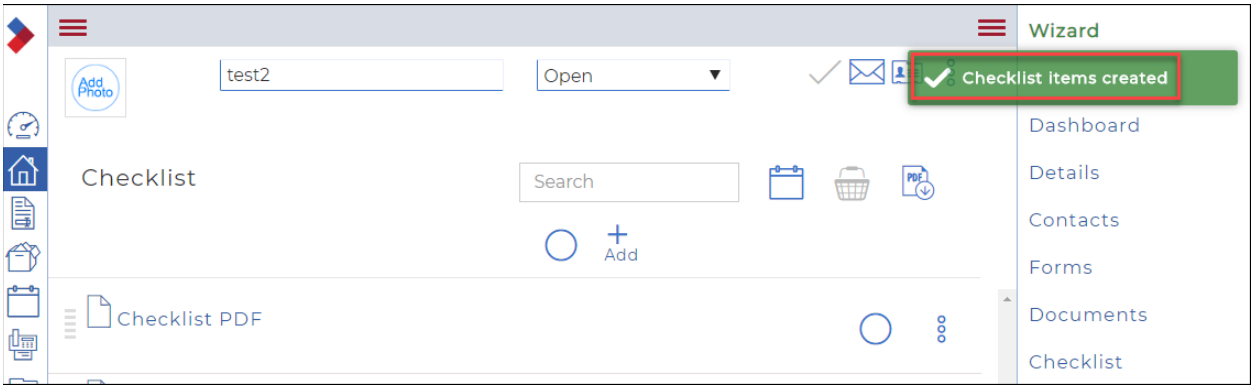
10. Click **Add Checklist**.
    The **Apply Checklists** dialog box displays.



11. Click to select the desired checklist, then click **Apply**.
    A confirmation dialog box displays.



12. Click Yes to confirm.
    A confirmation message briefly displays in the top right.



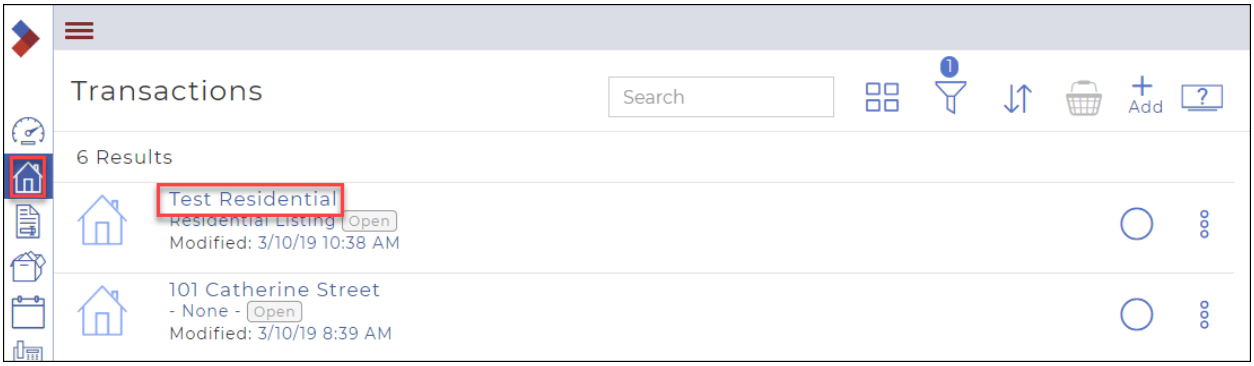
The checklist has been added to the transaction.

Archiving a transaction

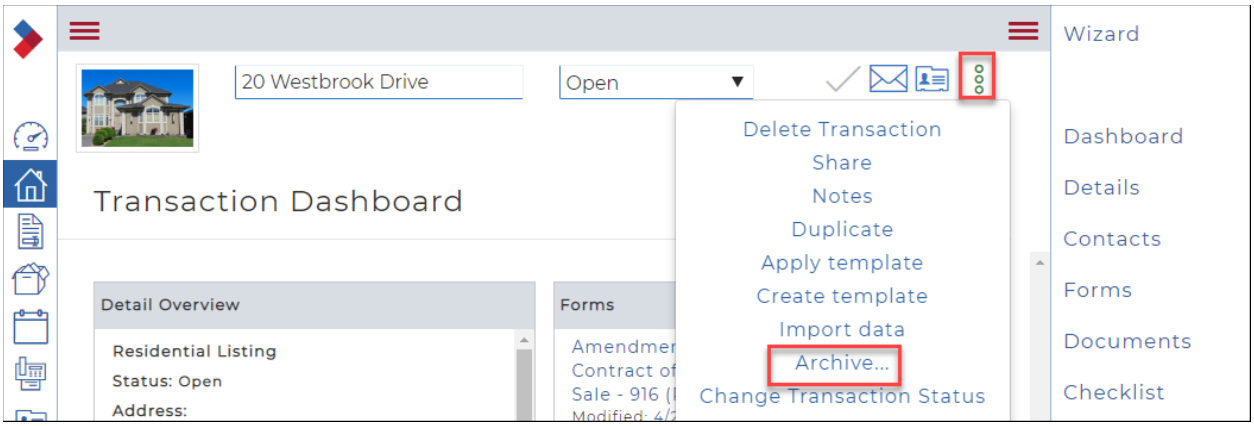
When a transaction is completed, and you no longer require access to it in the system, you can archive it to a long-term storage location. If you have a transaction that falls through before any of the paperwork is loaded into the system, you may want to simply delete the transaction.

To archive a transaction:

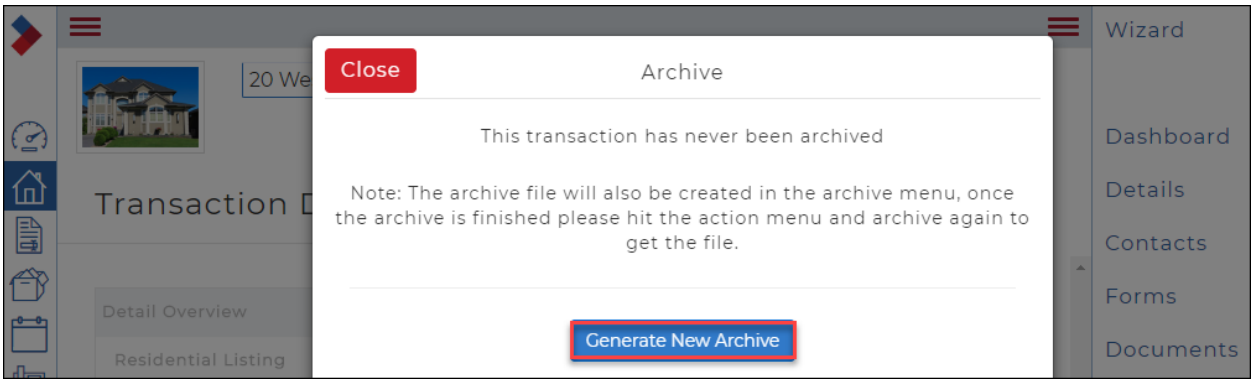
1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



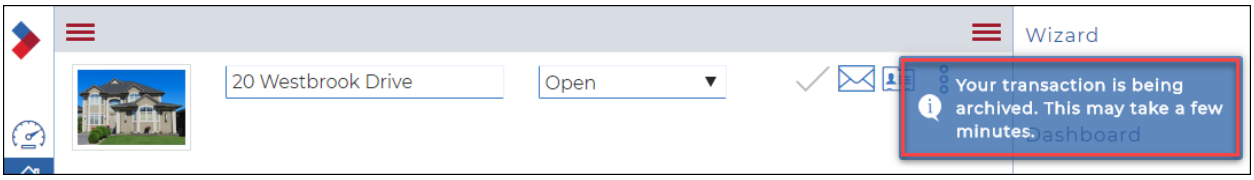
2. Click the transaction name to open the transaction.
   Your **Transaction Dashboard** displays.



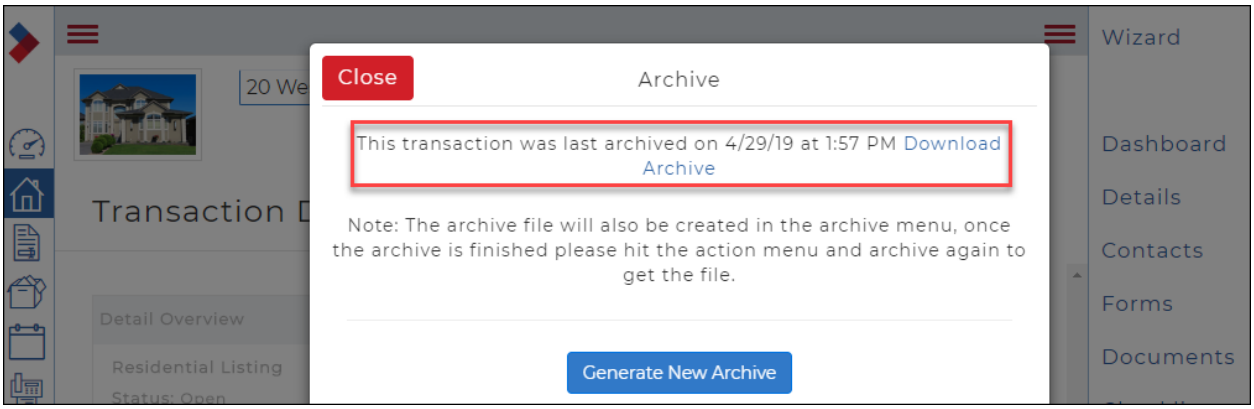
3. Click the **Ellipses Menu** ⋮ to display a dropdown menu.
4. Click **Archive.**
   The **Archive** dialog box displays.



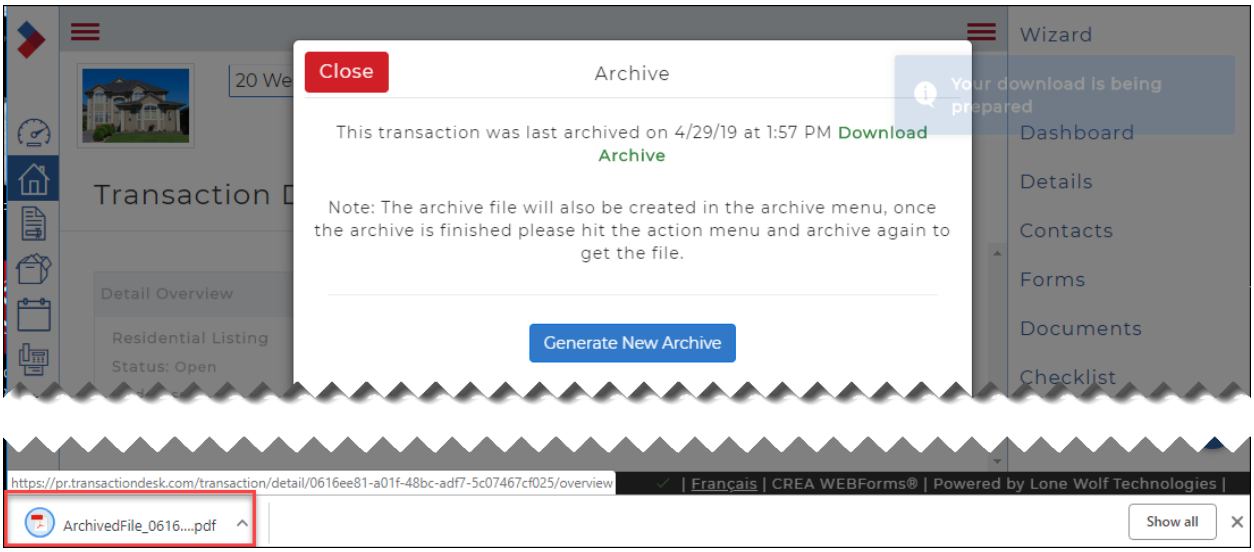
5. Click **Generate New Archive**.
   A message briefly displays in the top right that your transaction is being archived.



An archive file is created for the transaction in PDF format and is stored as part of the transaction. The transaction still displays in your list of transactions.



To access the archived PDF in future, locate the transaction again and click **Archive** again. You can then download a copy of the transaction to your desktop.



If you open the PDF, you see thumbtack icons for each of the documents. To open a document, double-click the thumbtack.

Deleting a transaction

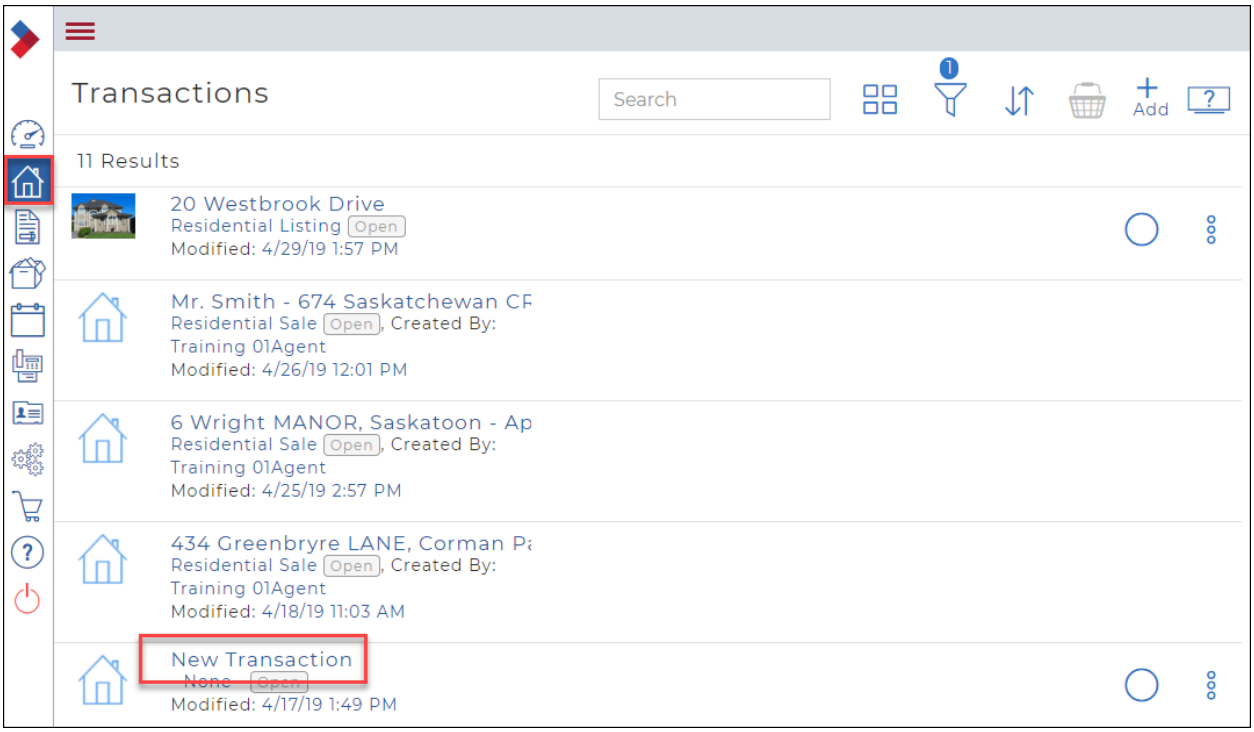
If you have a deal that falls through before any of the paperwork is loaded into CREA WEBForms®, you may want to simply delete the transaction.

Note: CREA WEBForms® never entirely deletes a transaction.

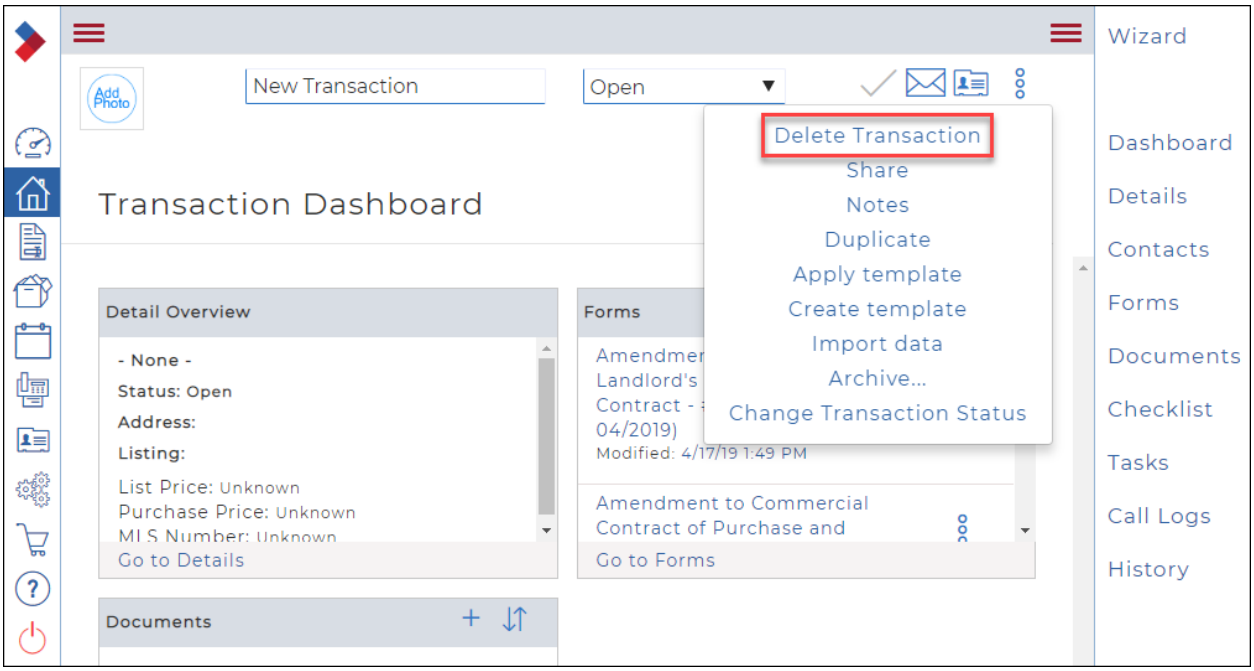
CLICK TO VIEW VIDEO

To delete a transaction:

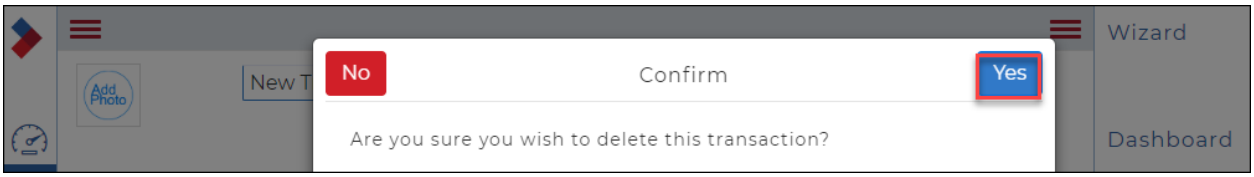
1. Click **Transaction**s in the Sidebar.
   Your **Transactions** display.



2. Click the name of the transaction that you want to delete.
   The **Transaction Dashboard** displays.

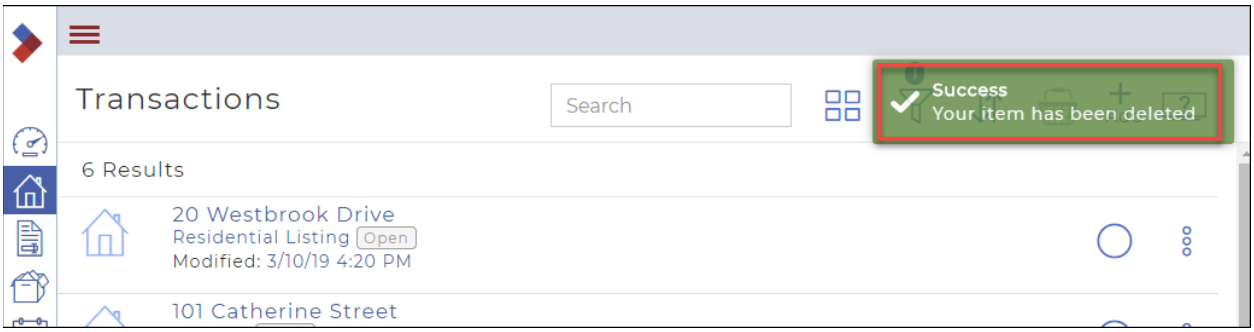


3. Click the **Ellipses Menu** ⋮ to display a dropdown menu.
4. Click **Delete Transaction**.
   A **Confirm** dialog box displays.



5. Click **Yes**.

A message briefly displays in the top right corner indicating that your item has been deleted, and you are returned to the **Transactions** list. The transaction is no longer visible to you. However, it still exists within the system.

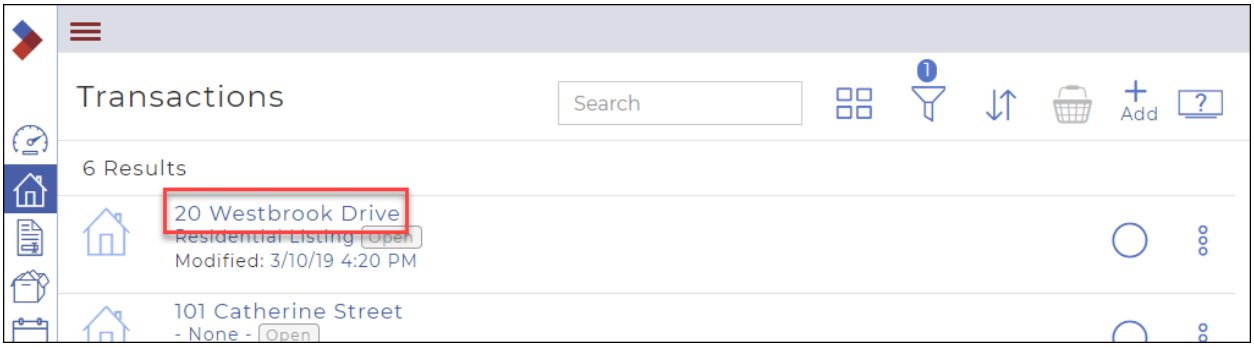


Viewing the progress of a transaction

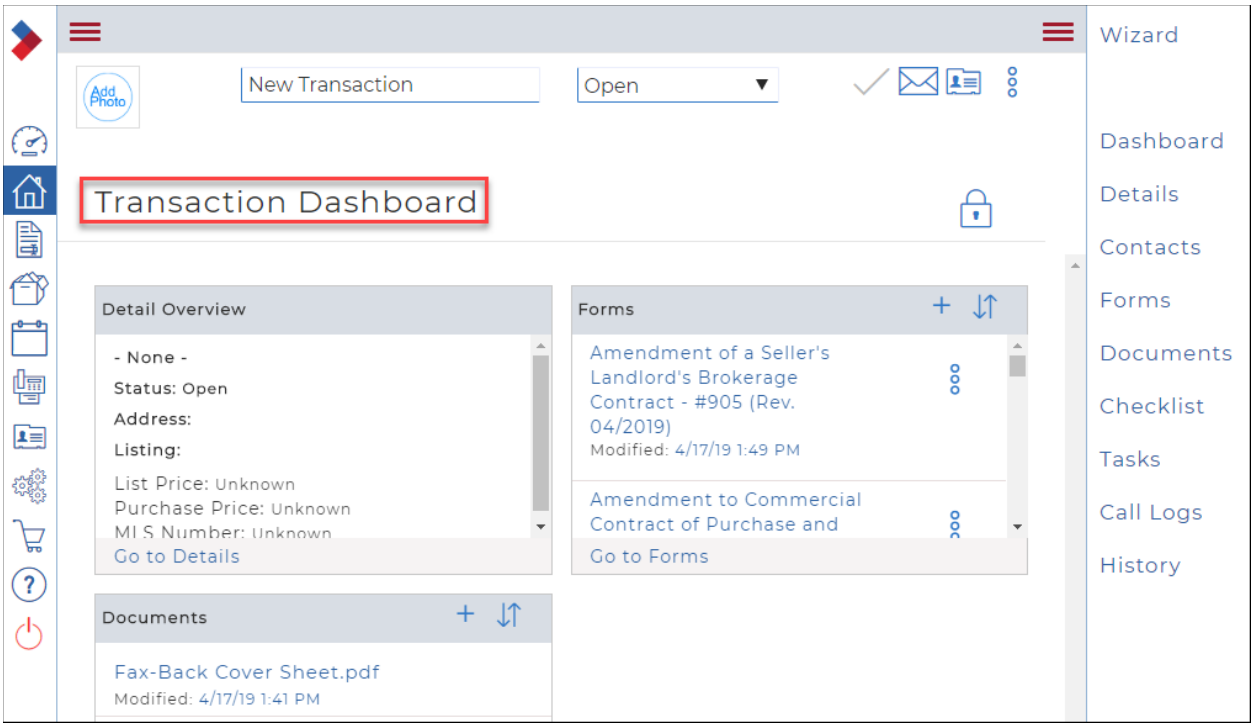
You can review an individual transaction to see its progress and determine what remains to be completed to close the transaction.

To view the progress of a transaction:

1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



2. Click the name of the transaction that you want to view.
   The **Transaction Dashboard** displays.



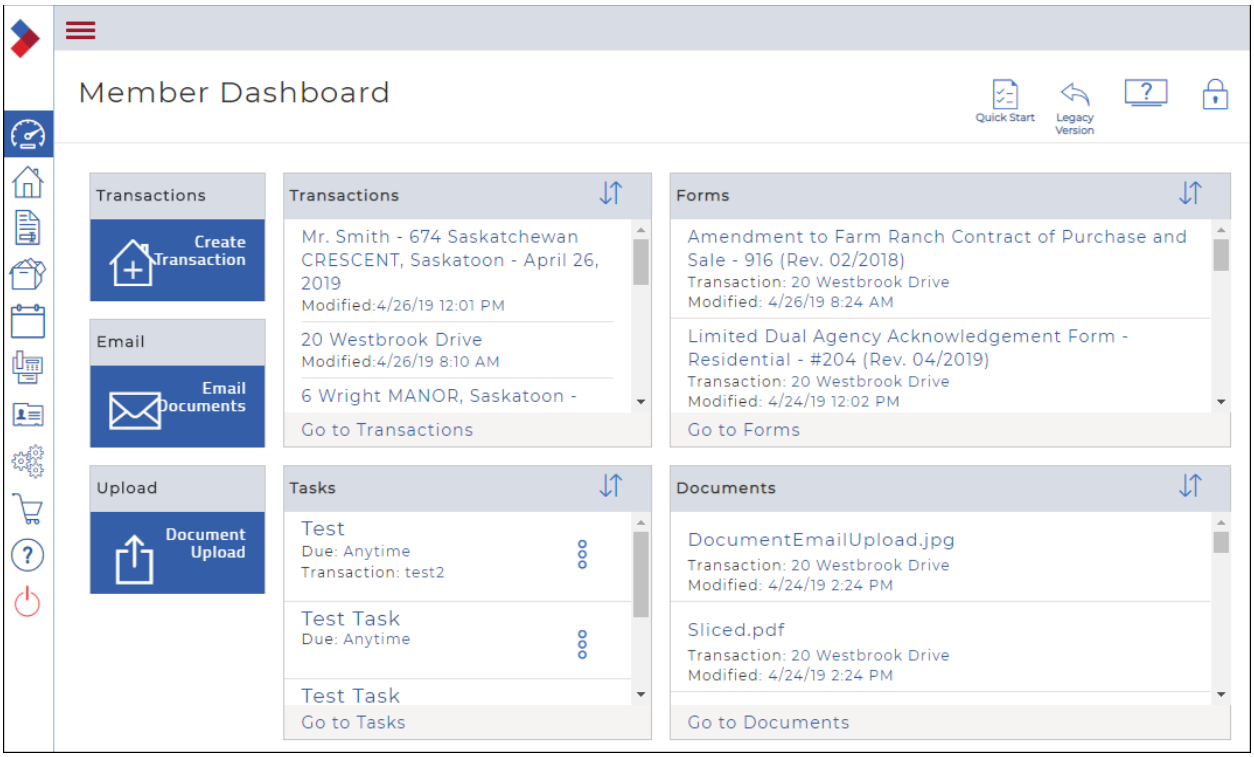
from the **transaction dashboard**, you can see key information about the transaction at a glance. The specific information you will see depends on the widgets that you add when you customize your dashboard.

Viewing the status of in-progress transactions

You can arrange your **Member Dashboard** to provide a quick view of your ongoing deals in the system.

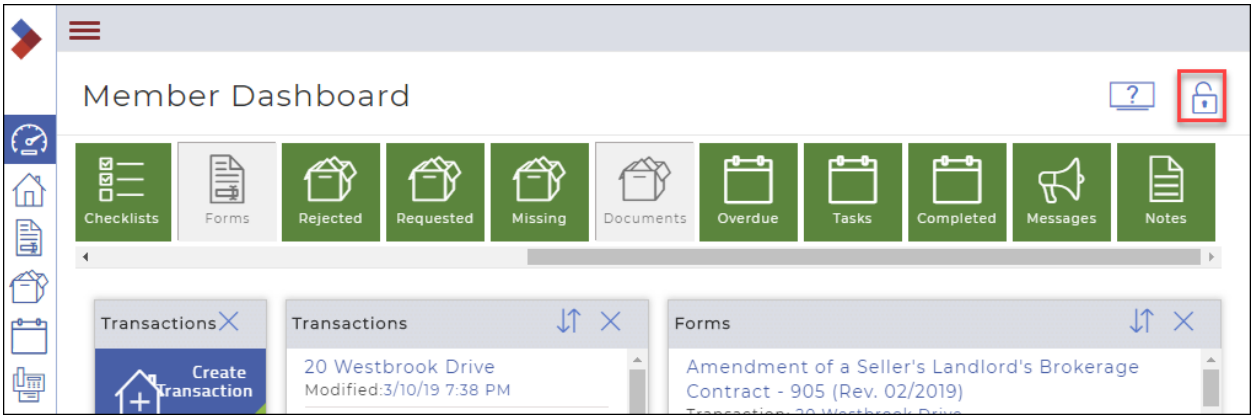
To view the status of in-progress transaction:

1. Click **Dashboard** in the Sidebar.
   Your **Member Dashboard** displays.



2. For best results, ensure you have the following widgets in your dashboard:
   a) Transactions
   b) Checklists
   c) Overdue Tasks
   d) Rejected Document Review
   e) Missing Document Review

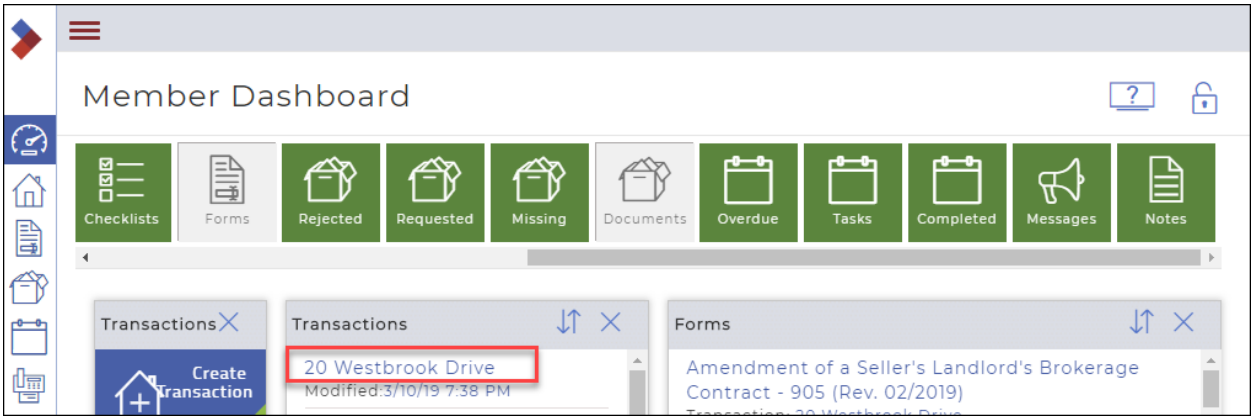
With these widgets, you can see a list of your transactions, the checklists that still have tasks outstanding, tasks that are overdue, and any transactions that are missing document reviews, or have documents that have been rejected.



3. To change the widgets in the dashboard, do the following:

a) Unlock the dashboard by clicking the **Lock** to open it and display the widgets.
b) Locate each missing widget in the widget tray and drag it to the dashboard.
c) Close any unwanted widgets by clicking the X in the upper right corner of the widget.
d) Lock the dashboard by clicking the **Lock** to close it.

4. To go to the transaction dashboard for an individual transaction, in the **Transactions** widget, click the transaction name.



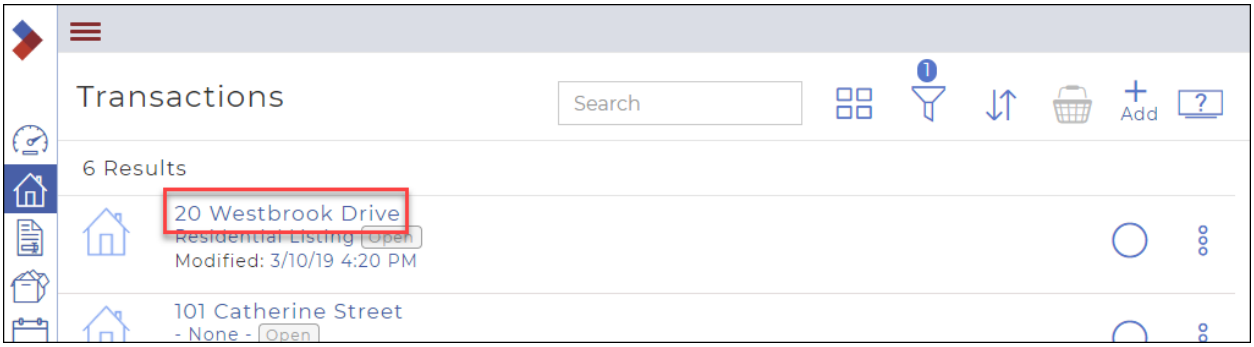
Sharing a transaction with a client

You can provide a client with an account to access a transaction they are involved in. You can create a client dashboard to allow a client to access a transaction directly in the system. They are unable to edit any transaction details but can view whatever data you want to allow them to view. You can also allow them to upload documents to the transaction.

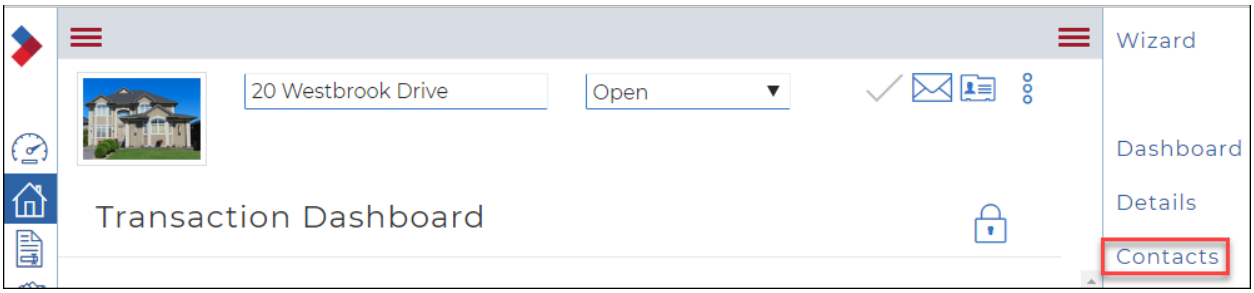
Note: You cannot share a transaction with a client unless you first have an email address for the client.

To share a transaction with a client:

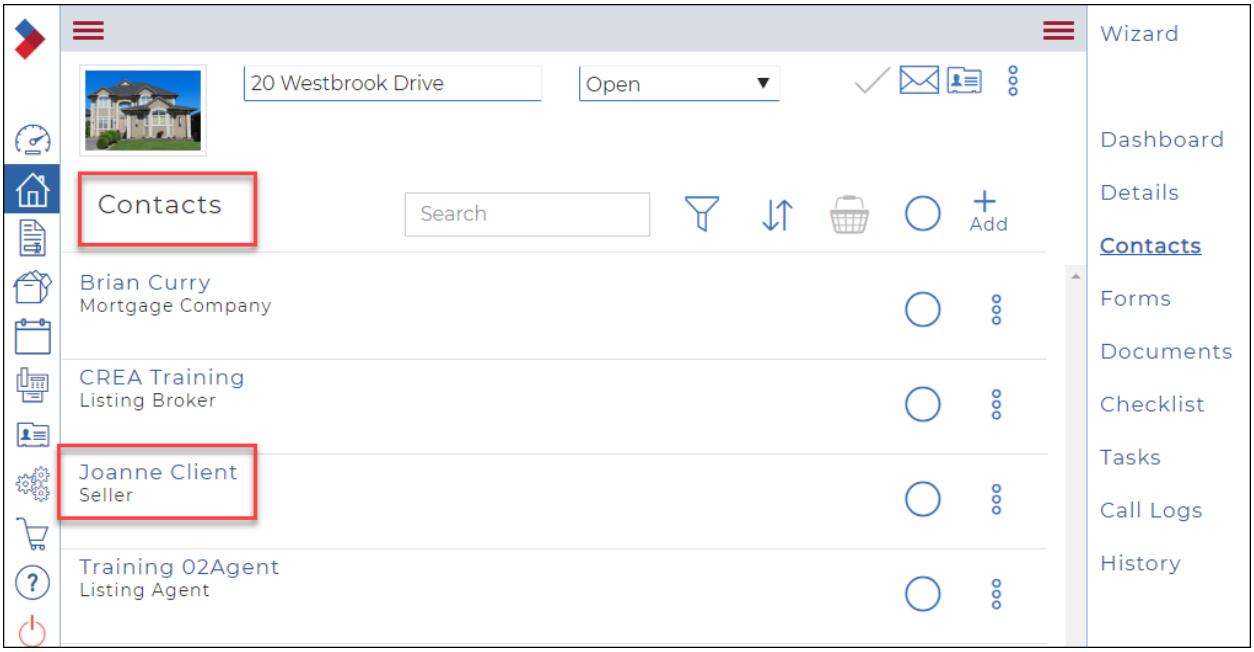
1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



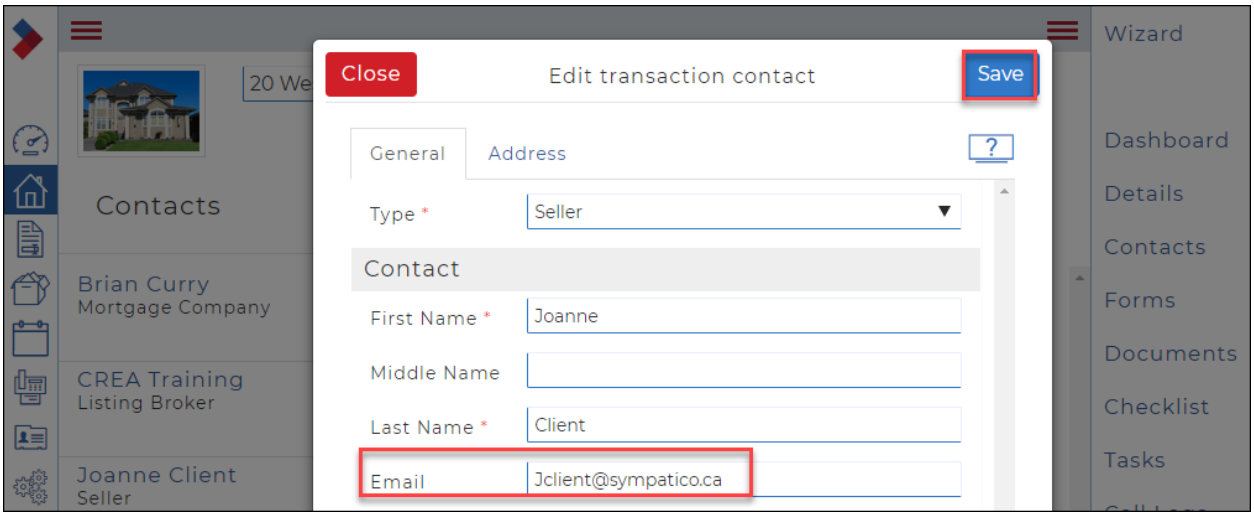
2. Click the name of the transaction that you want to share with the client.
   The **Transaction Dashboard** displays.



3. Click **Contacts**.
   The **Contacts** dialog box displays.



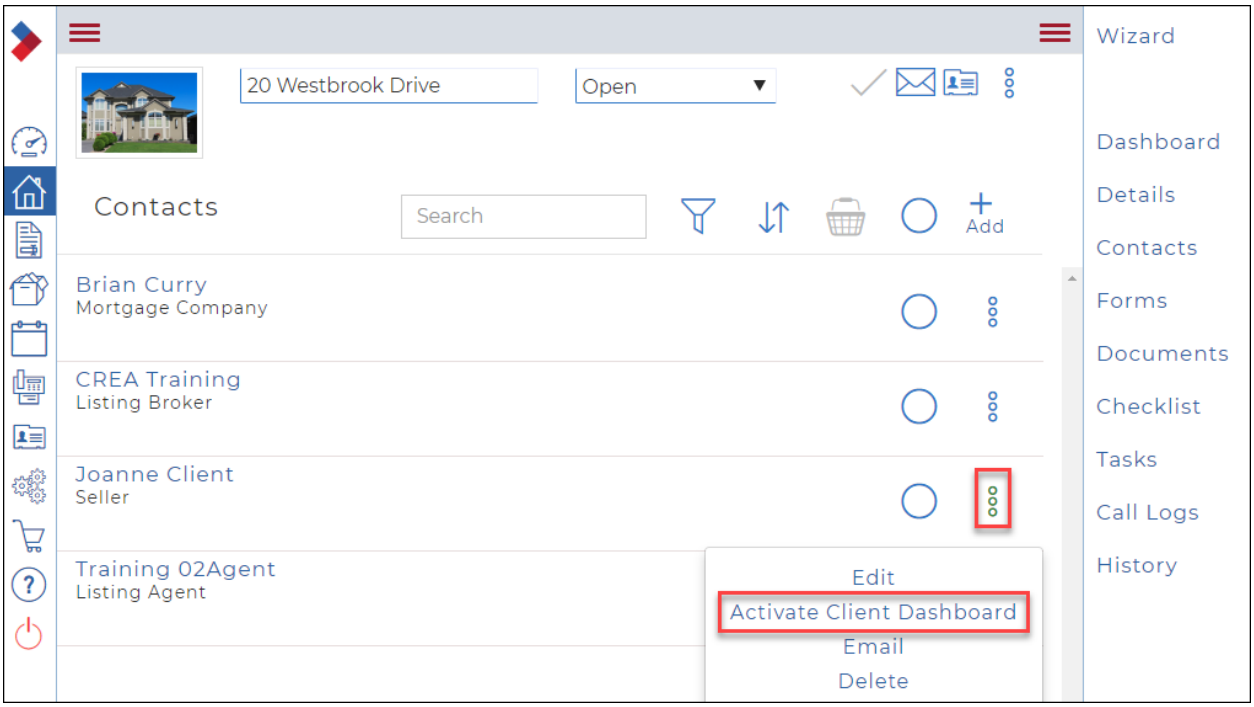
4. If you are unsure whether the client has an email address on file, click the client's name.
   The **Edit transaction contact** dialog box displays.



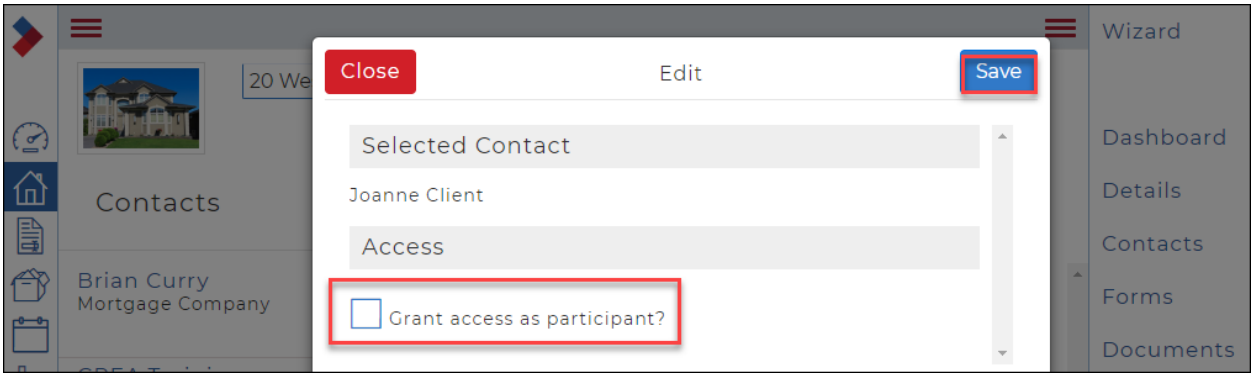
5. Ensure there is an email address in the **Email** field

- If you added an email address, click **Save**.
- If an email address already exists, click **Close** to exit the **Edit transaction contact** dialog box.

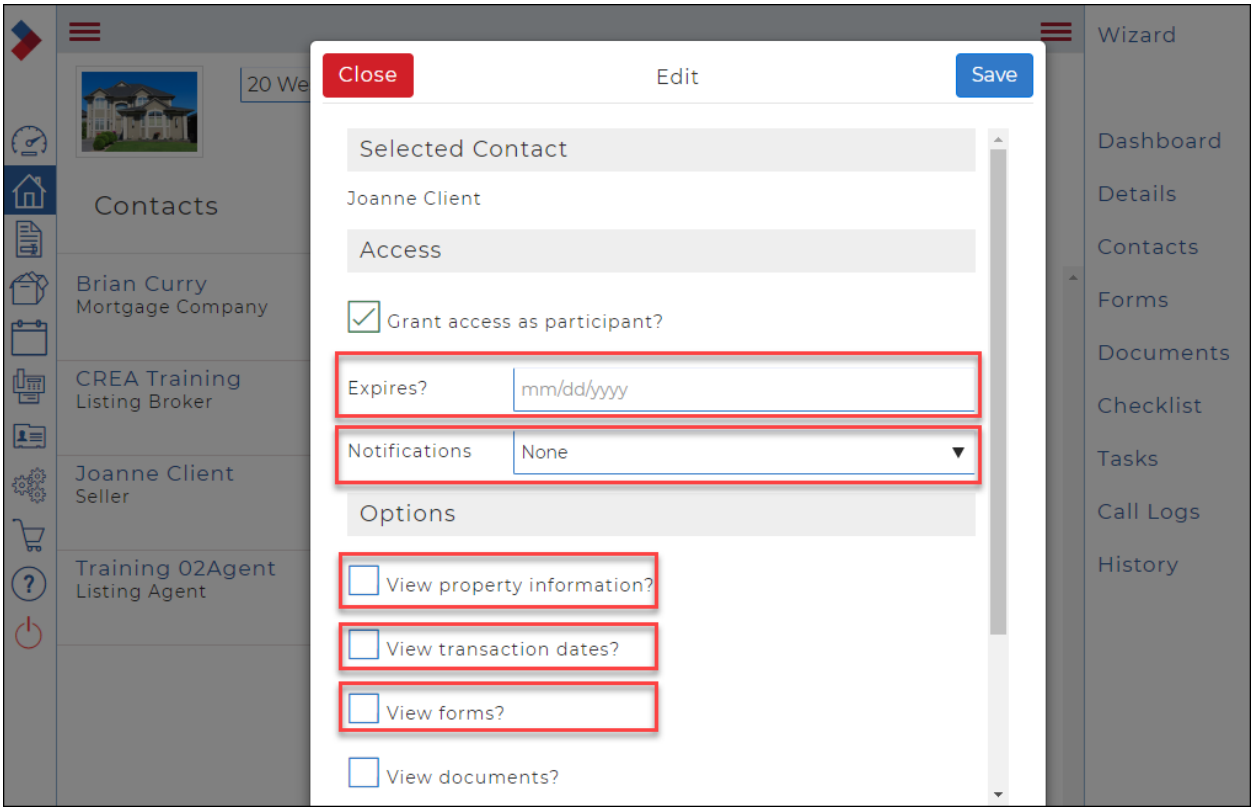
6. Click the **Ellipses Menu** to the right of the contact you want to share the transaction with.
   A dropdown menu displays several actions.



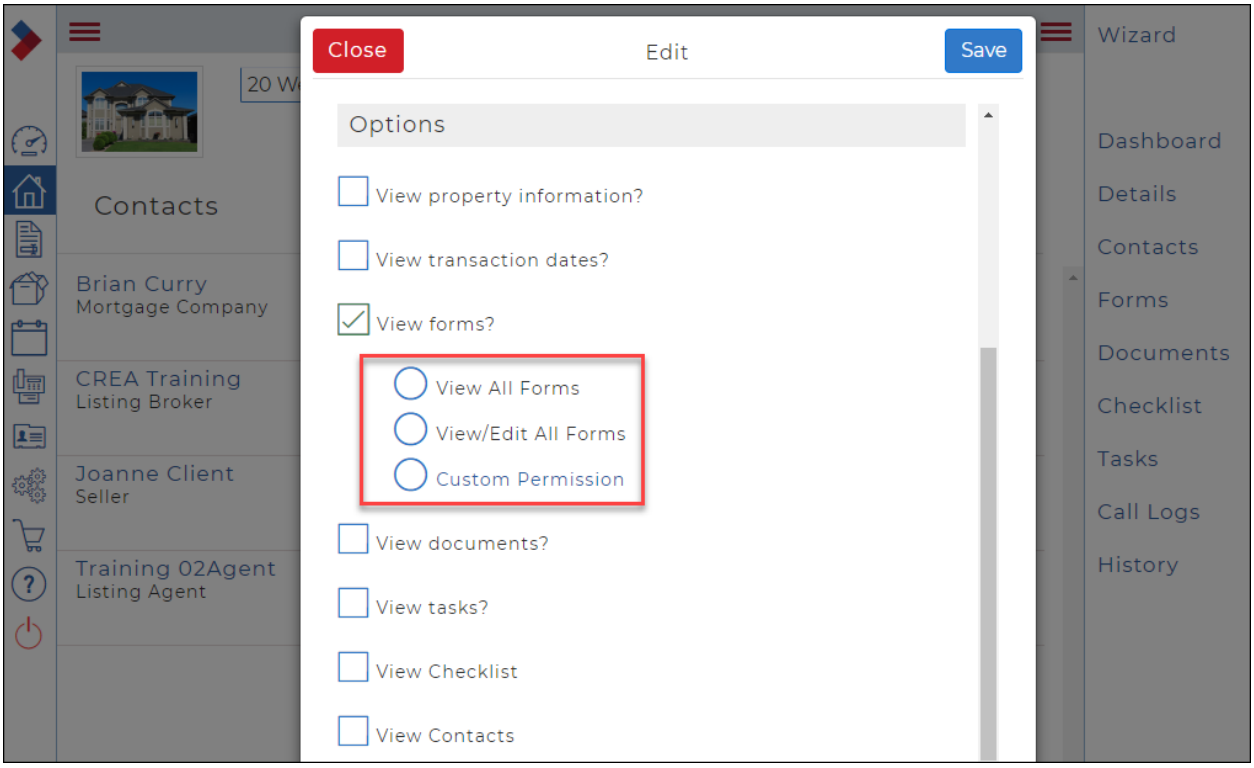
7. Select **Activate Client Dashboard**.
   An **Edit** dialog box displays.



8. Check **Grant access as participant**.
   Additional fields display.



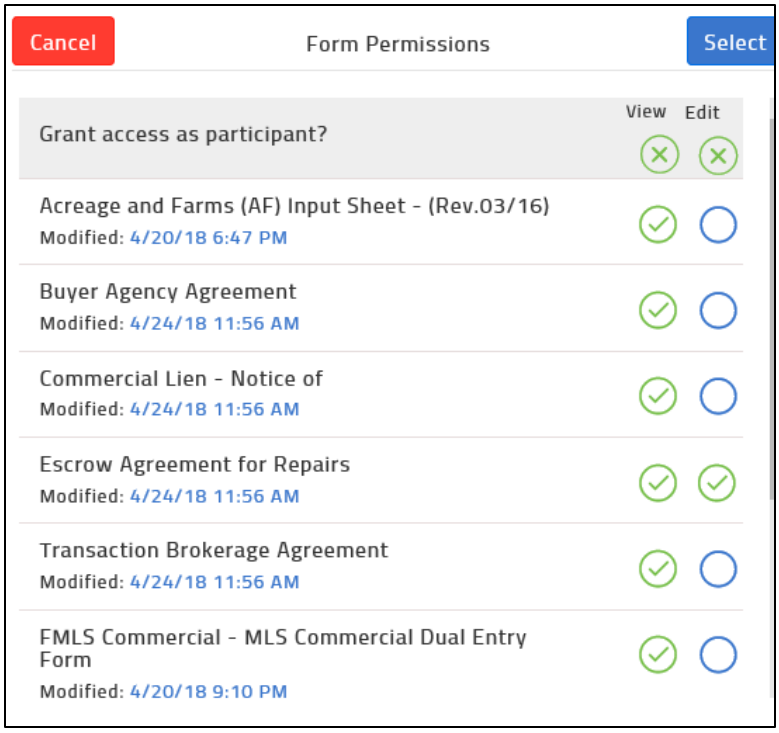
9. If you want this person's access to expire (recommended), in the **Expires** field, enter an appropriate expiry date.
10. If you want to receive notifications from the system when this person accesses the system or for all their actions, use the **Notifications** dropdown to select when you want to be notified.
11. If you want this person to be able to view property information, check **View property information**. They cannot change any of the property information.
12. If you want this person to be able to view transaction dates, check **View transaction dates**. They cannot change any of the transaction dates.
13. If you want this person to be able to view forms, check **View forms**.
    Additional options display.



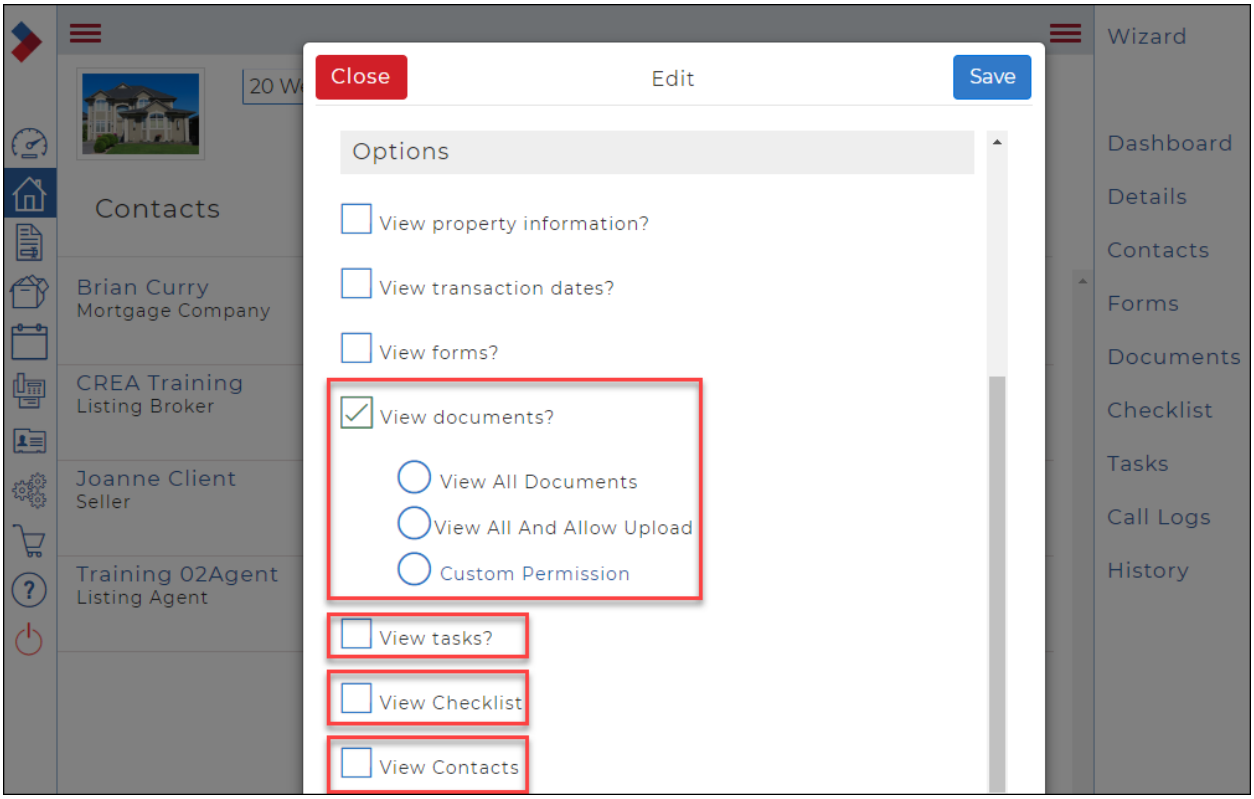
Do one of the following:

- If you want this person to be able to view all forms, but make no changes, select **View All Forms**.
- If you want this person to be able to view and edit all forms, select **View/Edit All Forms**.
- If you want this person to be able to view or view and edit specific forms, select **Custom Permission**. The **Form Permissions** dialog box displays.

This dialog box lists all the forms attached to the transaction. You can select **View** or **Edit** for individual forms, or you can use the **Grant access as participant option** to select View or Edit for all the forms. In the following example, the user has **View** access to all forms, and **Edit** access to the Escrow Agreement for Repairs.

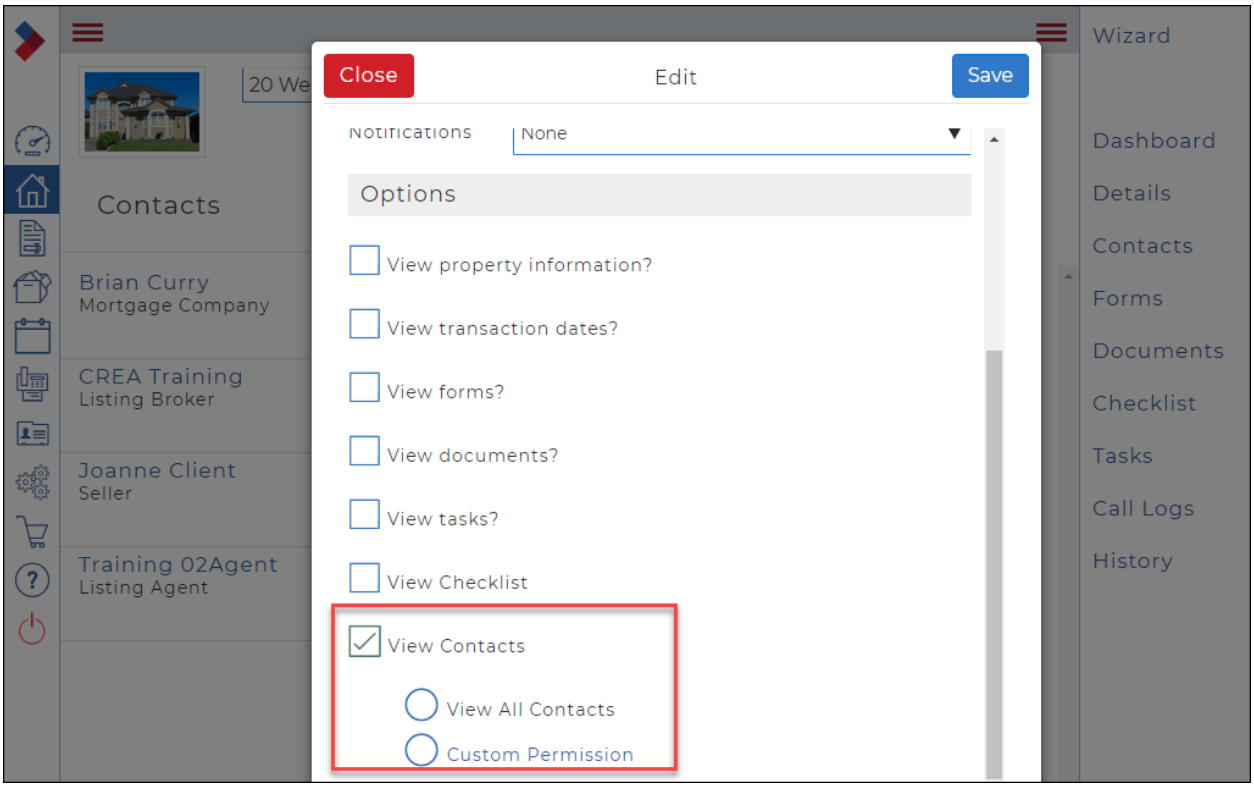


14. Click **Select.**
15. If you want to allow this person to view or upload documents, repeat steps 13 and 14 for **View documents**.



16. If you want this person to be able to view transaction tasks, check **View tasks**.

17. If you want this person to be able to view the transaction checklist, check **View Checklist**.
18. If you want this person to be able to view the transaction contacts, check **View Contacts**. Additional options display.



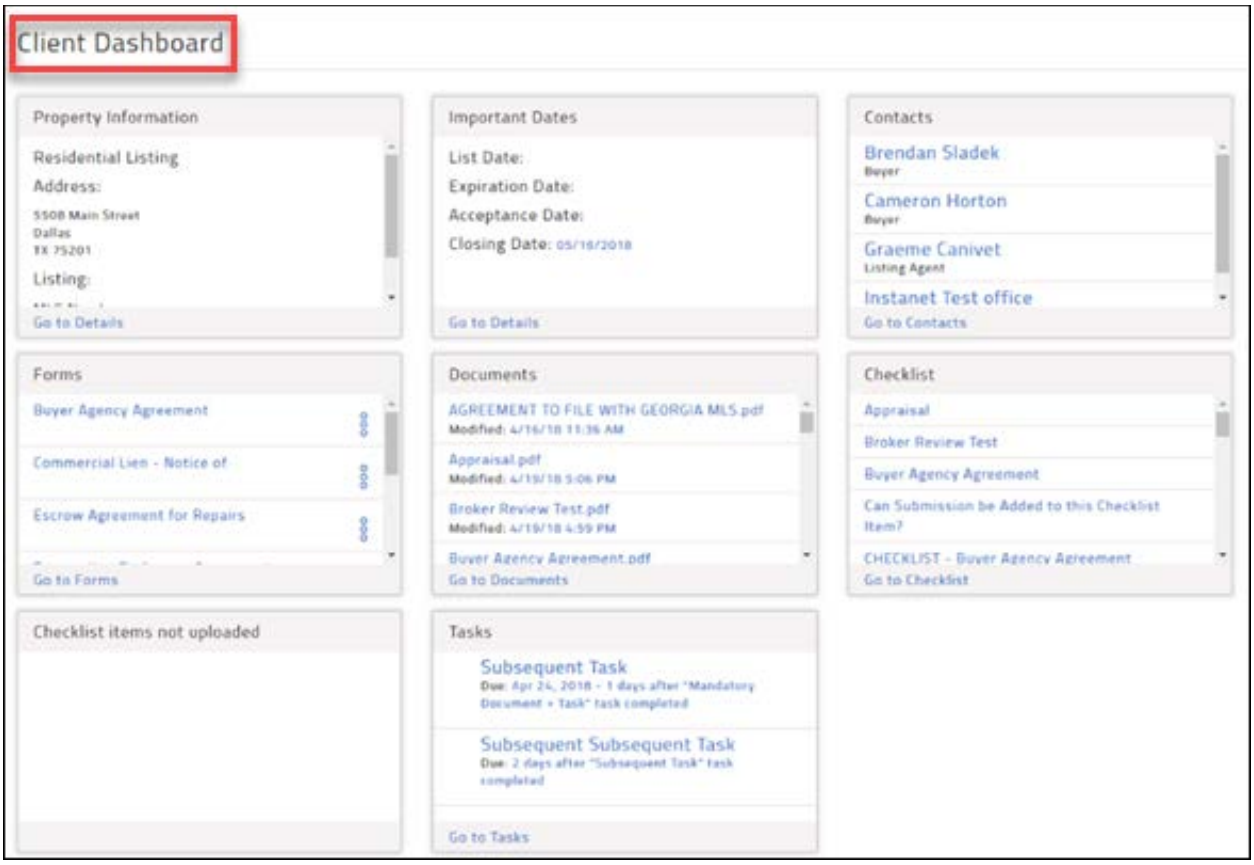
Do one of the following:

- If you want this person to be able to view all contacts, select **View All Contacts.**
- If you want this person to only be able to view some of the contacts, select **Custom Permission**, and check the contacts you want to allow this person to see. **Click Select**.

19. Click **Save**.

The client receives an email invitation to access the transaction. When they click the link in the email, they see the client dashboard.

What the client sees depends on the options you selected. The following is an example of a client dashboard:



Sending a transaction form to an esignature provider

Note: To send a transaction form to an esignature provider, you must first have an account with an esignature provider, and then you must link your CREA WEBForms® to that account.
See Linking to an esignature provider for details.

Signings have four components:

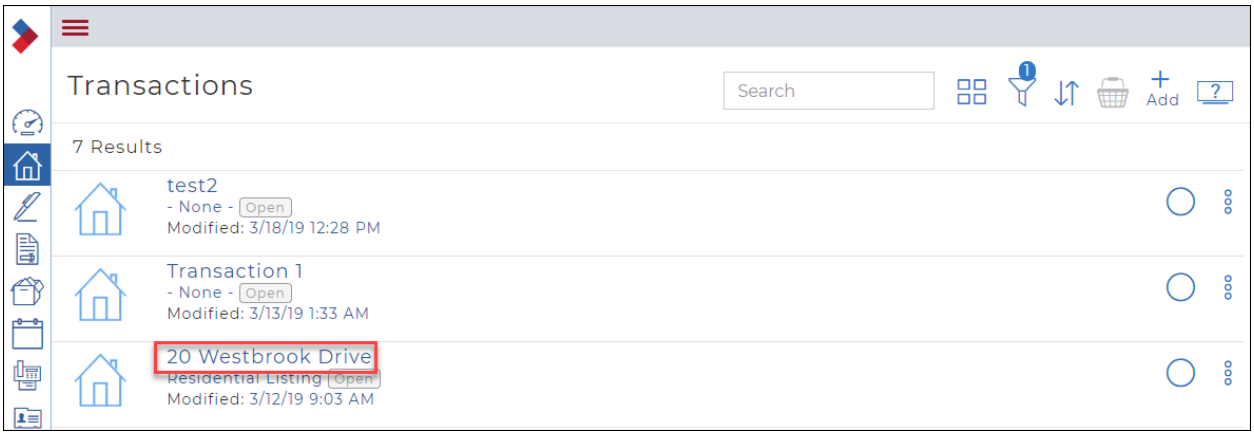
- Forms and/or documents
- Participants
- Digital signatures and initials
- Transactions

Forms/documents, participants, and digital signatures/initials are mandatory for all signings. Transactions are only required for transaction signings.

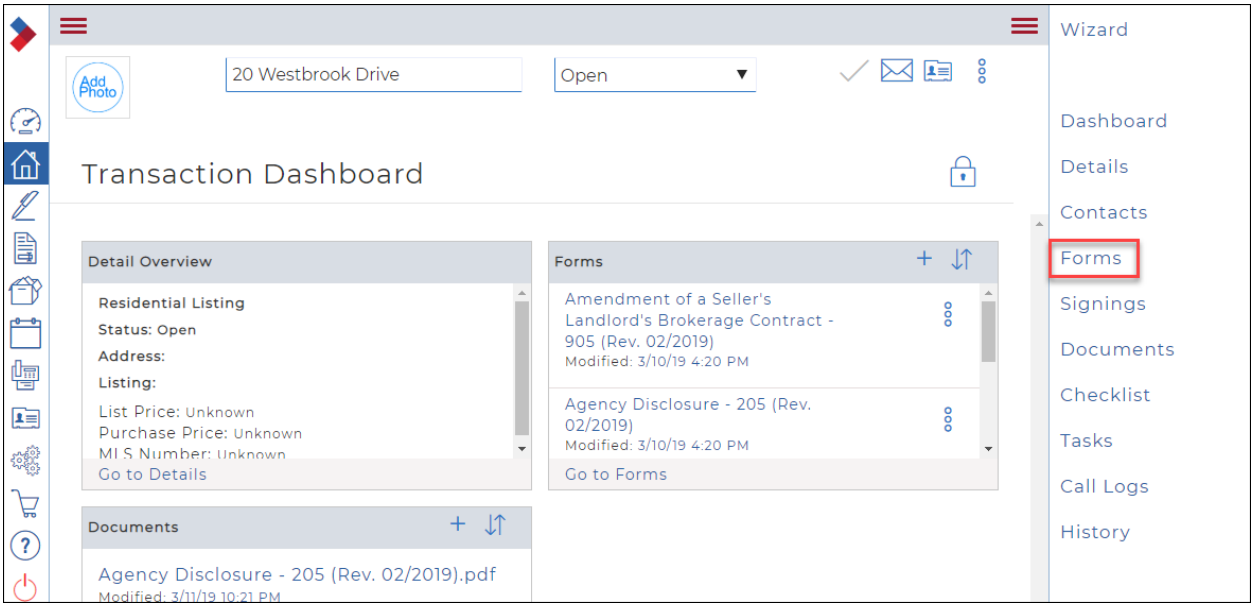
To send transaction forms to an esignature provider:

Note: Ensure that you have linked your esignature account to your CREA WEBForms® account.
See Linking to an esignature provider for details.

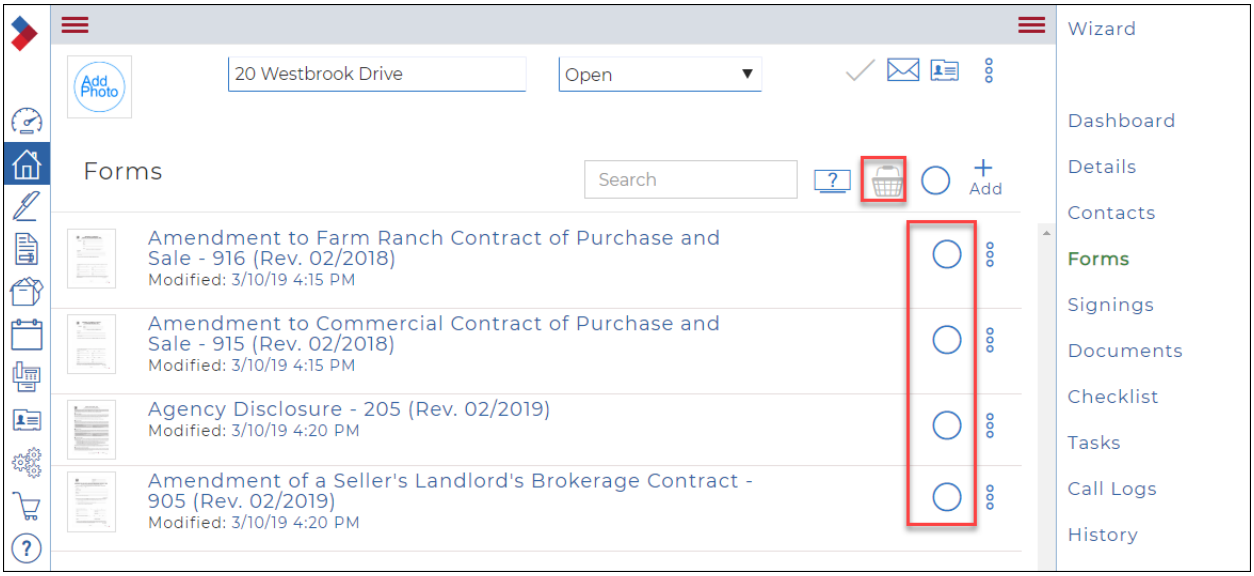
1. In the Sidebar, click **Transactions** .
   Your Transactions window displays a list of transactions.



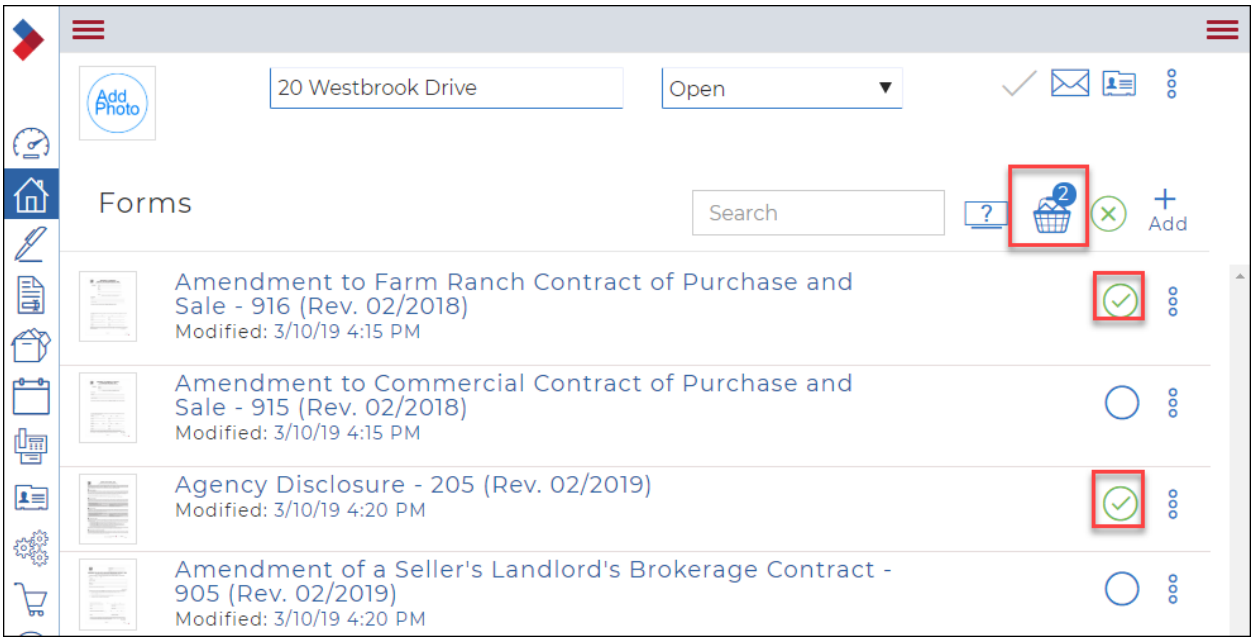
2. Click the name of the transaction you want to send.
   The **Transaction Dashboard** displays.



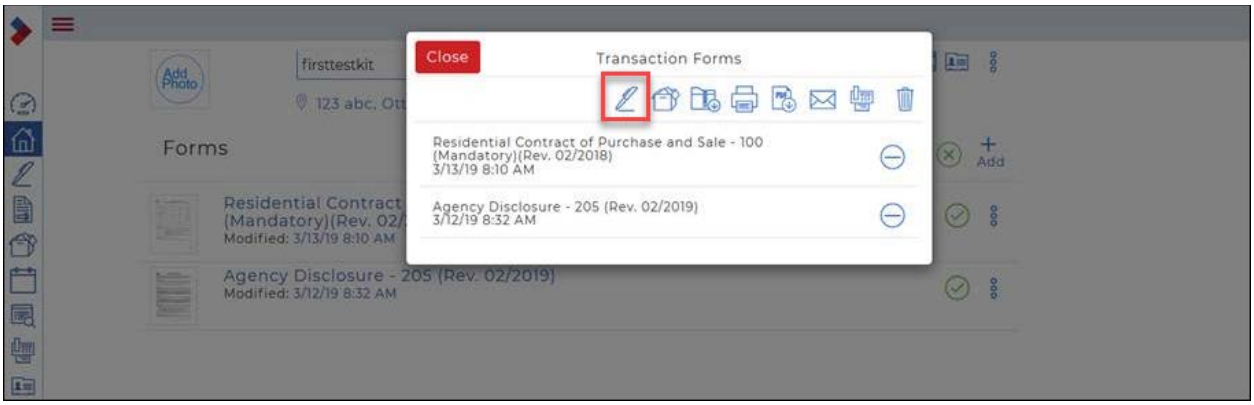
3. In the right menu, click **Forms**.
   The Forms window displays all the forms for this transaction.



4. Click the circle ○ beside the form or forms you want to select.
   Once you click, the selected form will be added to your basket.

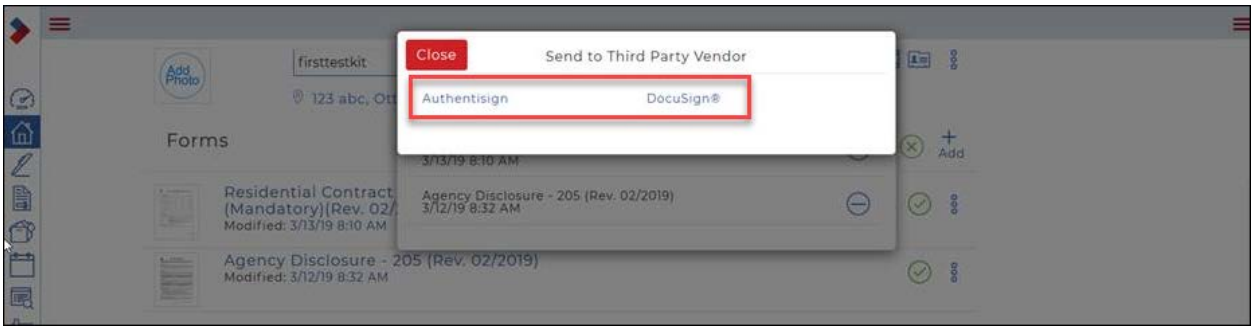


5. When you are done selecting forms, click the **Basket** .
   The **Transaction Forms** dialog box displays.



6. Click **Signing** .
   The **Send to Third Party Vendor** dialog box displays any vendors that you have linked.

See Linking to an esignature provider for details.



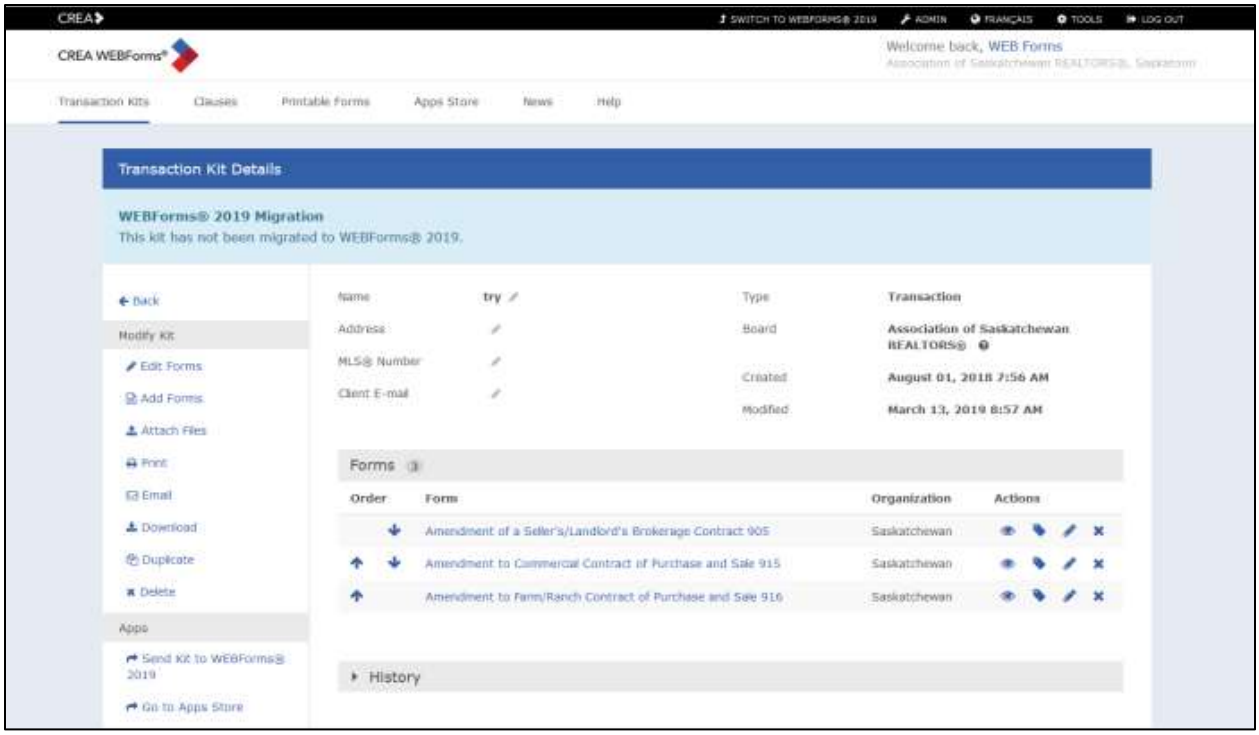
7. Click your desired **Third Party Vendor**.
   This will take you to the esignature dashboard for that vendor.
   Follow the instructions for your vendor.

Saskatchewan REALTORS® Only - Sending CREA Legacy Transaction Kits to Authentisign

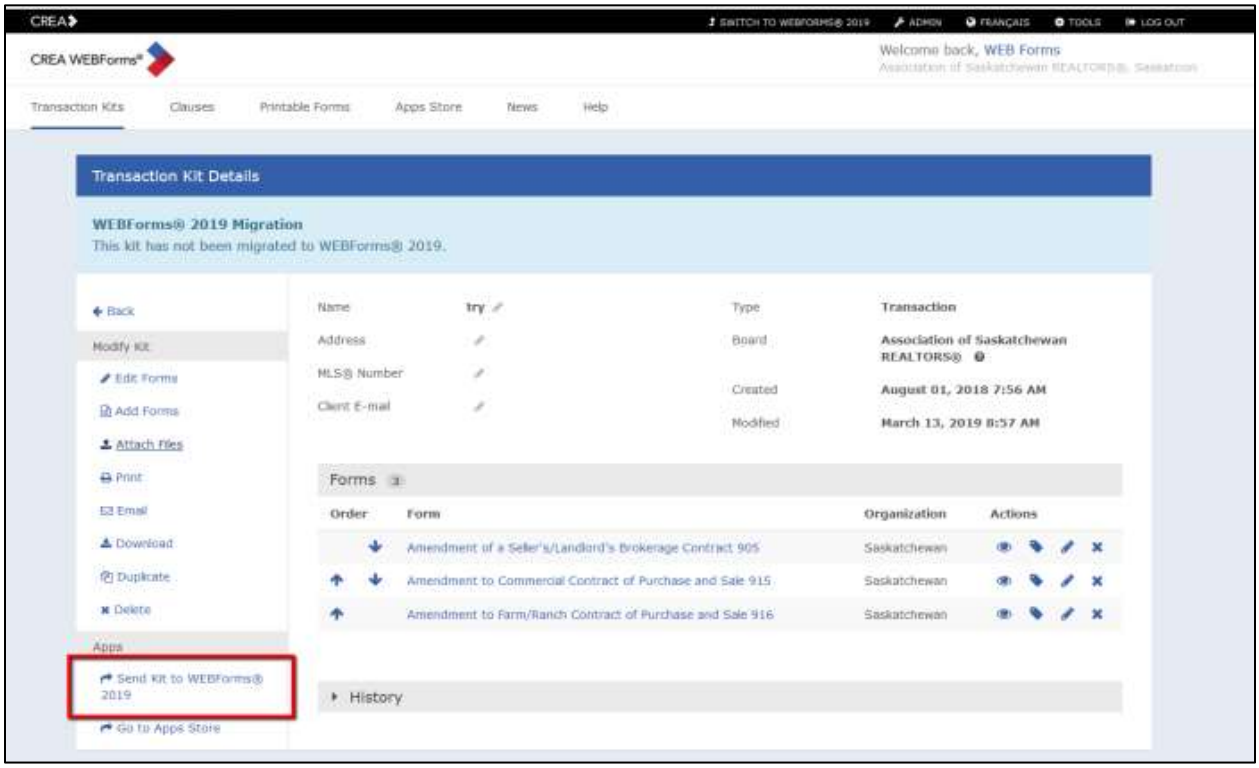
With the rollout of CREA WEBForms® 2019, the legacy version of WEBForms® is being retired. If you still want to use WEBForms® Legacy to send transaction kits to Authentisign, you must follow the steps below to keep your Authentisign linked.

To send a transaction kit to Authentisign using WEBForms® Legacy:

1. Open the transaction kit that contains the documents/forms that you wish to send to Authentisign.



2. When you are ready to send forms/documents to Authentisign, select **Send to WEBForms® 2019**.

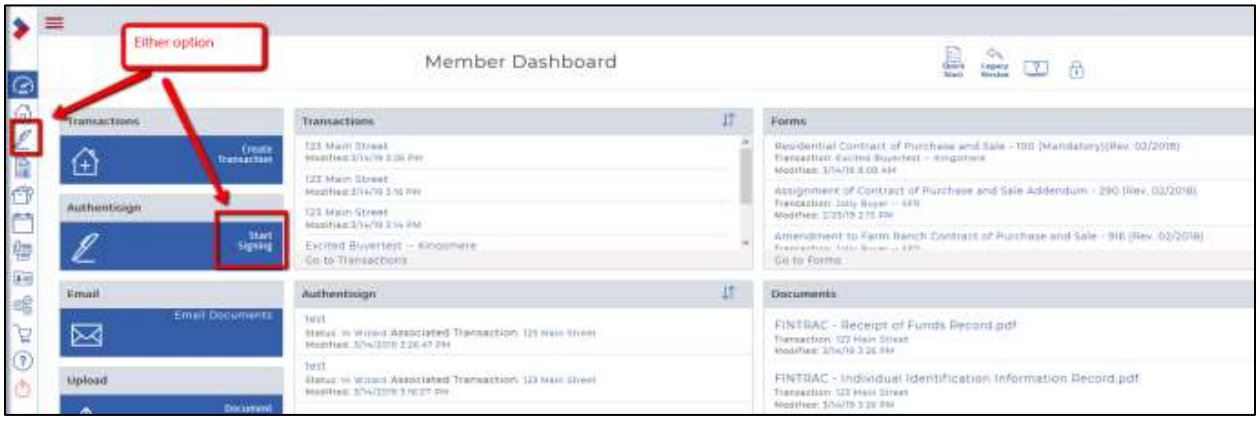


This will send the transaction kit over to CREA WEBForms® 2019, where it automatically creates a new transaction.

3. Next, select Switch to WEBForms® 2019 in the top black banner.

This will take you to the new CREA WEBForms® 2019. Authentisign users have their Authentisign accounts directly integrated into the new CREA WEBForms® 2019 platform.

4. Once you've been redirected, the CREA WEBForms® 2019 Member Dashboard displays.
   Here you can start the signing process by selecting Start Signing on the Authentisign widget or by clicking **Signing** on the Sidebar.



Your documents are now available to add when you progress through the signing. Since your signing is now linked to the transaction, it will copy the final documents into the documents section of that transaction. When you fully switch over to WEBForms® 2019, those transaction files will have your executed contracts stored and waiting for you.

Working with Transaction Templates

A transaction template defines a standard set of forms, documents, and checklist items that simplify the process of creating a transaction.

This section includes:

Creating a transaction template

Creating a transaction template from an existing transaction

Editing a transaction template

Applying a template to an existing transaction

Creating a transaction template

A transaction template defines a standard set of forms, documents, and checklist items that simplify the process of creating a transaction.

For example, you have certain forms and documents required for a residential listing. You also have a list of tasks that apply to most residential listings. You can create a template called "Residential Listings" and attach the forms

and documents, and a checklist to it. Then, each time you create a transaction for a residential listing, you only need to apply the Residential Listings template: All the forms, documents, and checklist items required are automatically added to the transaction.

Note: You require CREA WEBForms® Broker Edition to access to create transaction templates for an office. You can, however, share a transaction template with your team members using the Sharing option.
Note: Before you can share a transaction template with a group or team, the group must first be defined.

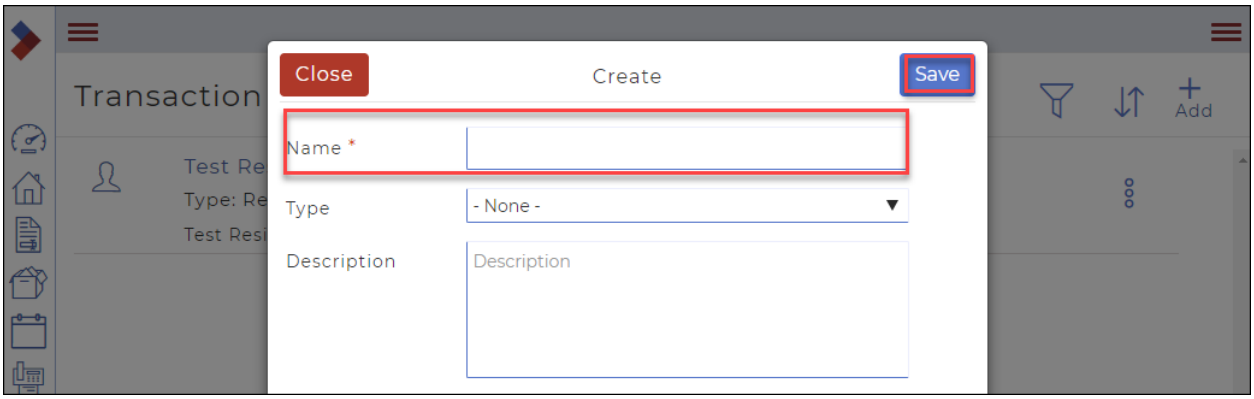
CLICK TO VIEW VIDEO

To create a transaction template:

1. In the Sidebar, click **Setup** .
   The Setup options display.

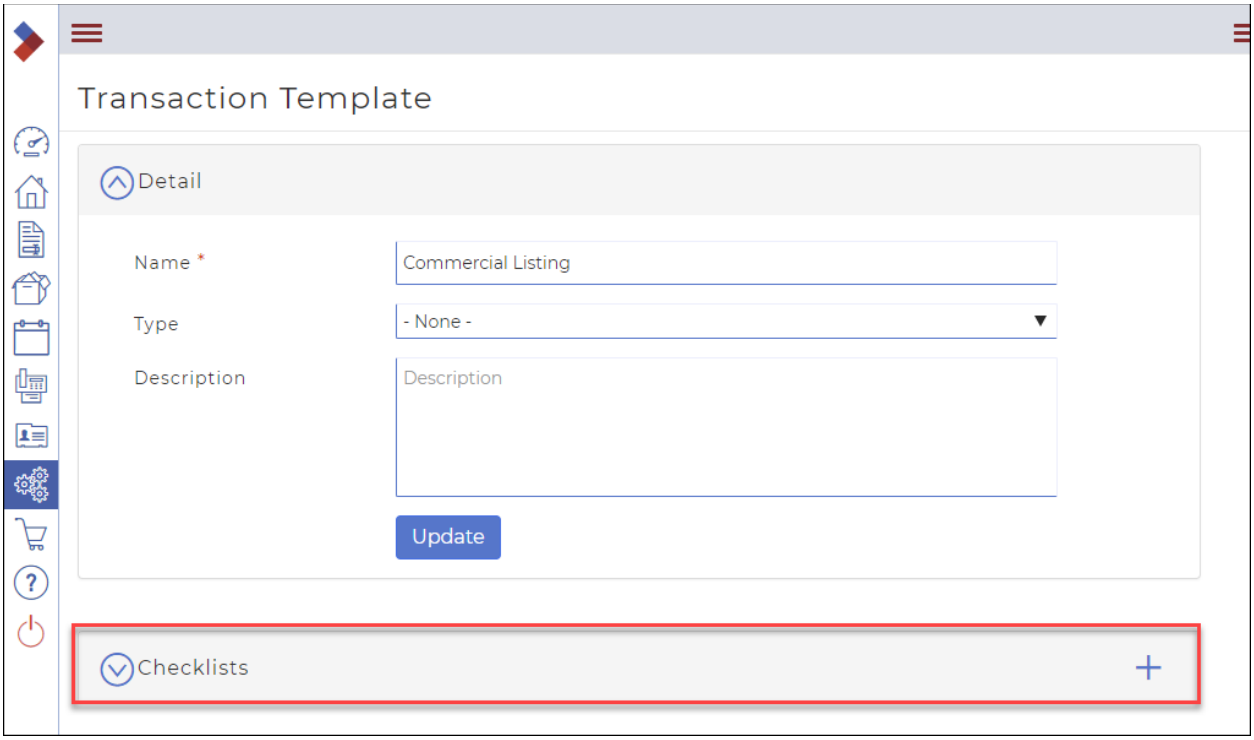
2. Select **Transaction Templates**.
   The list of existing templates is displayed.

3. Click **Add**.
   The **Create Transaction Template** dialog box displays.

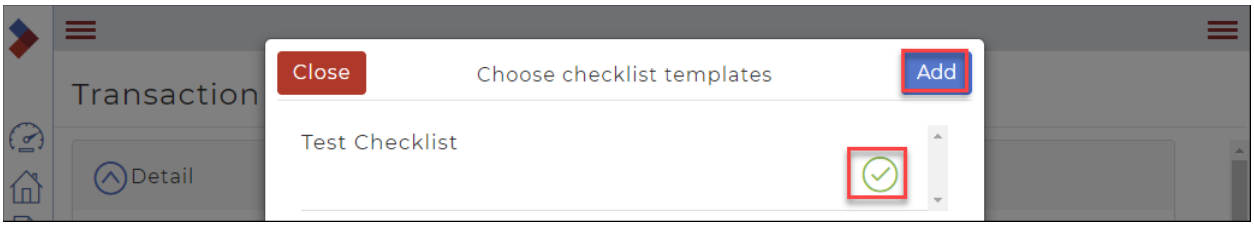


Note: Required fields are indicated by an asterisk.*

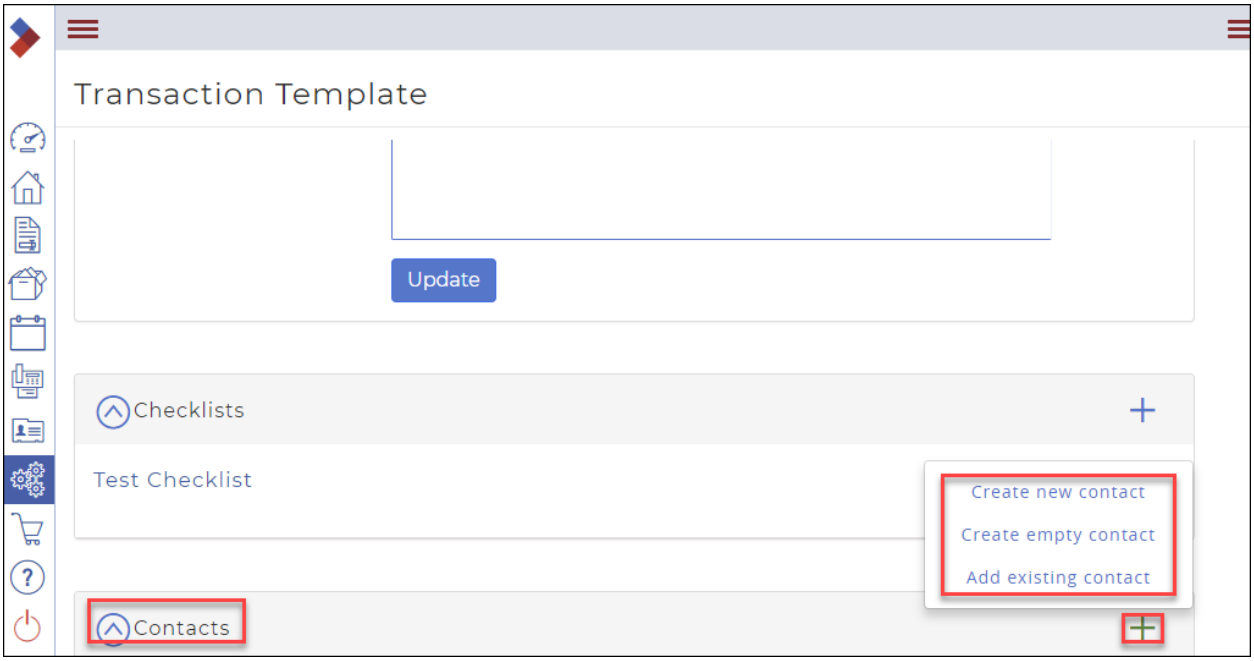
4. In the **Name** field, give the template a meaningful name, such as Residential Listings.
   Optional: Use the **Type** dropdown to select the type of transactions this template should be used for.
   Optional: In the Description field, enter a description for the template.
5. Click **Save**.
   The **Transaction Template** window displays.



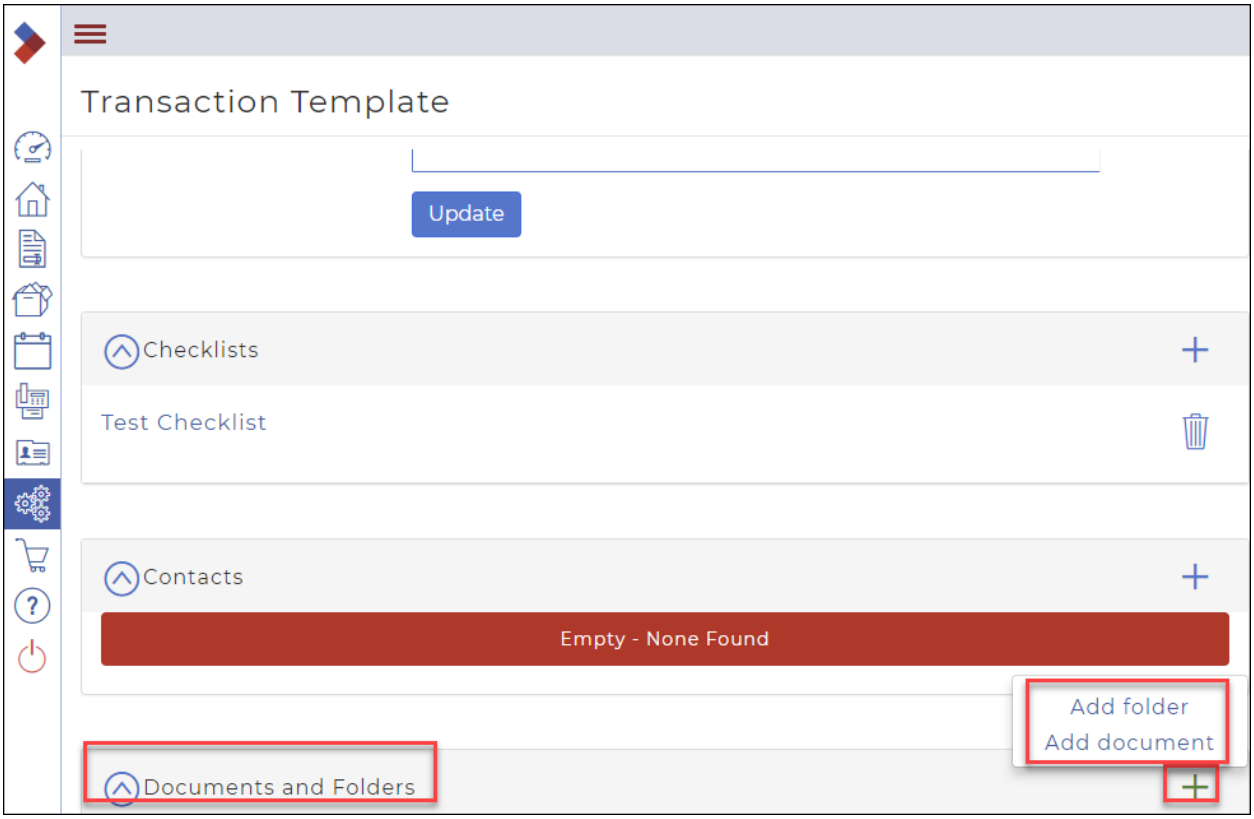
6. To add a checklist to the template that would be common to all transactions of that type, in the **Checklists** section, click **+.**
   The **Choose checklist templates** dialog box displays.



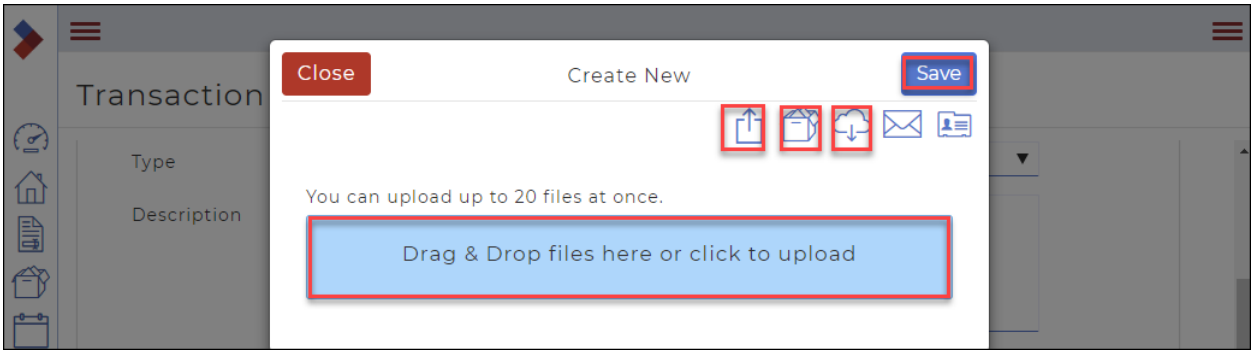
7. Select one or more checklists, then click **Add**.
   Any transactions created from this template have the checklists attached automatically.
8. To add a contact to the template that would be common to all transactions of that type, such as escrow company, in the **Contacts** section, click **+** .



9. Create or select the contact. Any transactions created from this template have the contacts added automatically.
10. To add the documents that are typically required for this type of transaction, in the **Documents and Folders** section, click +.



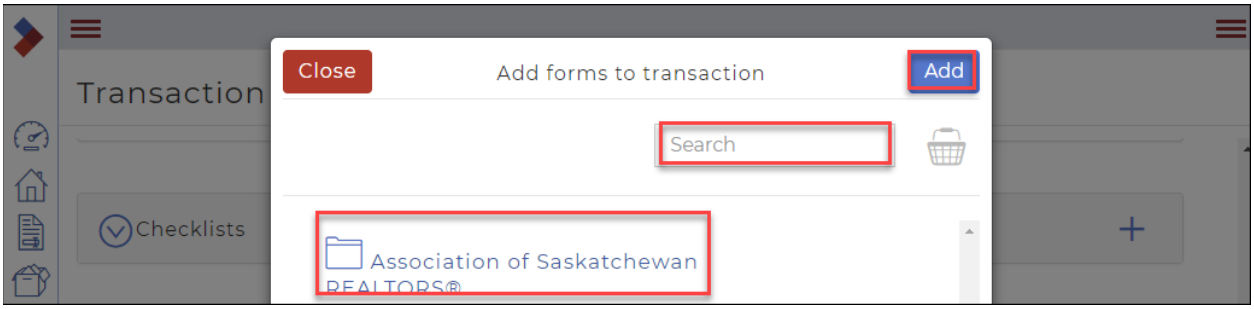
1. If you want to add individual documents, select **Add document**, add the documents, and click **Save**.



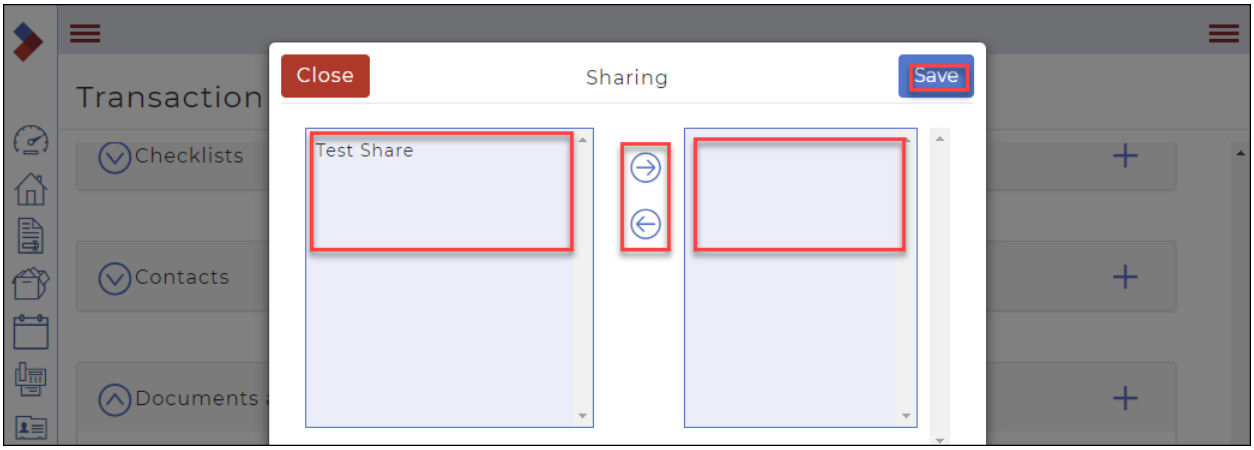
2. If you want to add a folder to organize the documents, select **Add folder,** give the folder a name, and click **Save**.

c. If you want to add a document to a folder you created here, click the folder name to open the folder. Then click **+**, select **Add document**, add the documents that you want in that folder, and click **Save**.

11. To add the forms that are typically required for this type of transaction, in the **Forms** section, click +.
    The **Add forms to transaction** dialog box displays.



12. Locate and select (check) the forms, then click **Add**.
    Any transactions created from this template have the forms attached automatically.
13. To share this template with your team, in the **Sharing** section, click +.
    The **Sharing** dialog box displays.



    a. In the left column, select the name of the group to share with.

    b. Click the right arrow to add the group to the list to share with.

    c. Click **Save**.

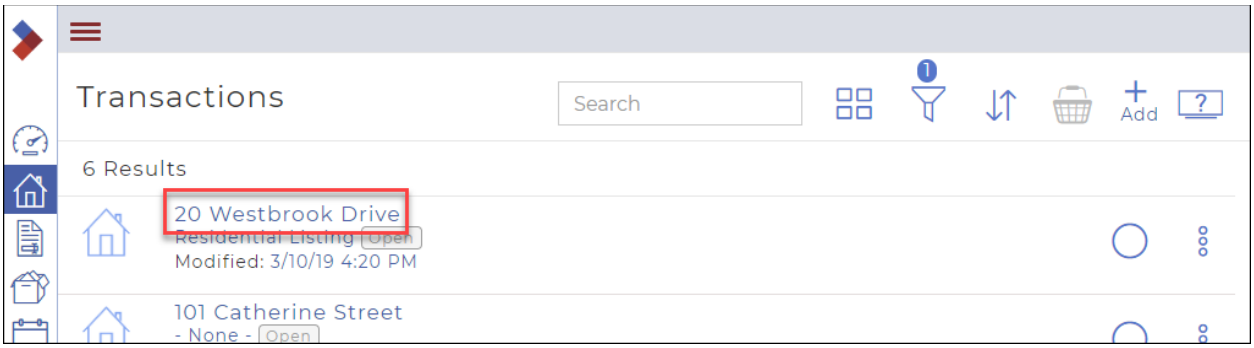
14. Click **Update**.

Creating a transaction template from an existing transaction

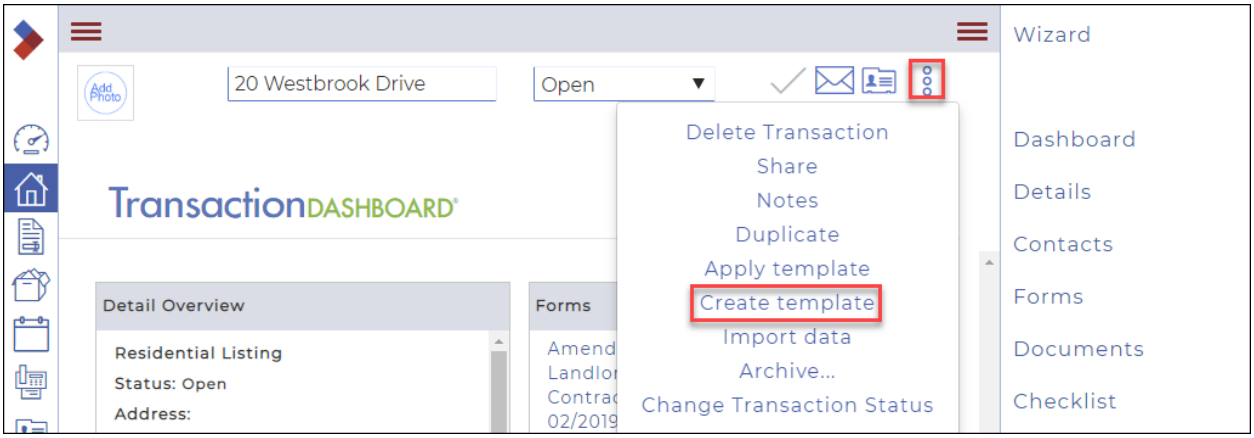
If you have an existing transaction that contains all the forms, documents, and checklists that it requires, you can create a transaction template from that transaction, to save time in template creation.

To create a transaction template from an existing transaction:

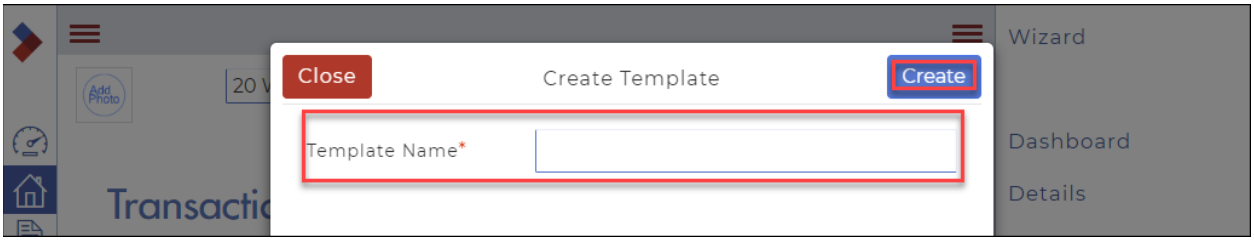
1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



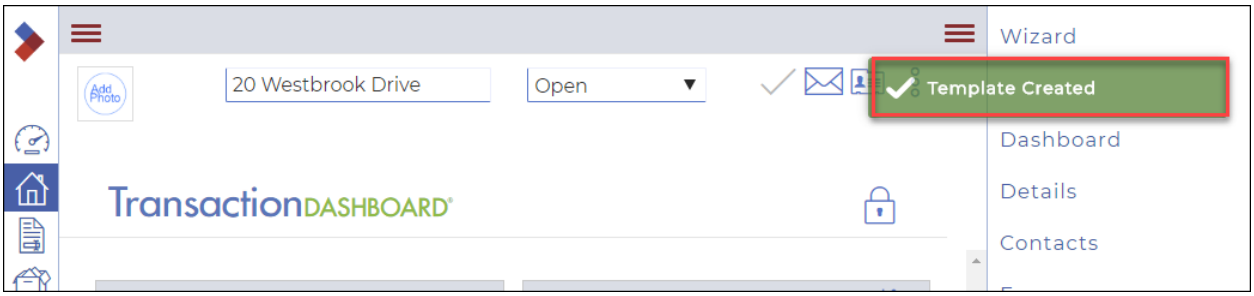
2. Click the name of the transaction that you want to use as a base for the template.
3. Click the **Ellipses Menu** ⋮ to display a dropdown menu.



4. Click **Create Template.**
   The **Create Template** dialog box displays.



5. Enter a **Template Name,** then click **Create**.
   A message briefly displays in the top right corner confirming that the template was created.



The template is created with all the same contacts, forms, documents, and checklists as were in the original transaction. You can edit the template to add or remove items. Signed forms remain filled and signed when a new transaction is created from the template.

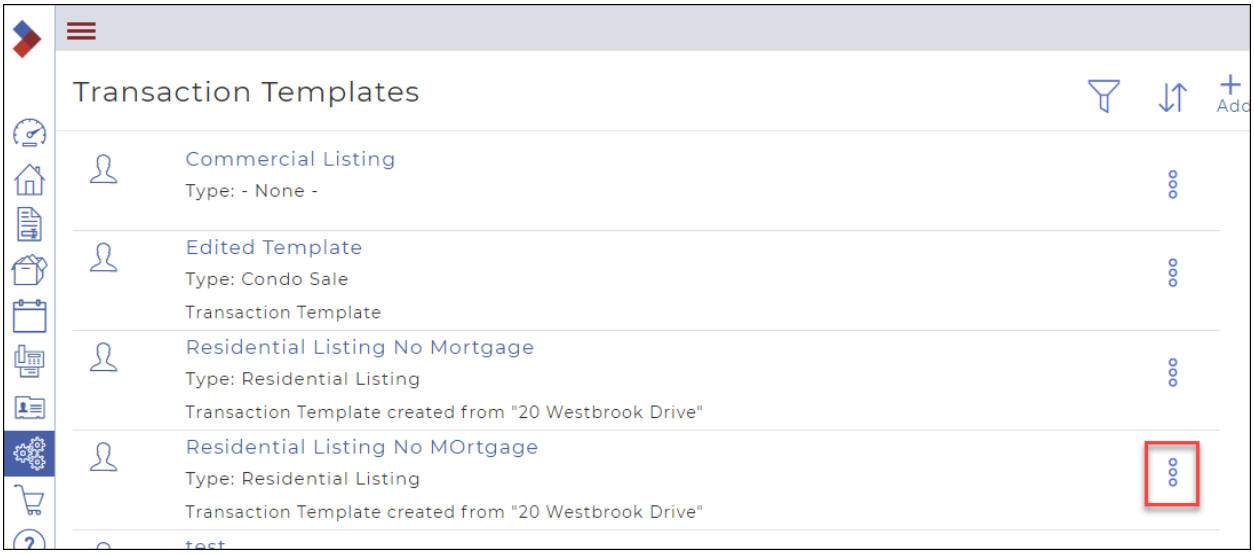
Editing a transaction template

CLICK TO VIEW VIDEO

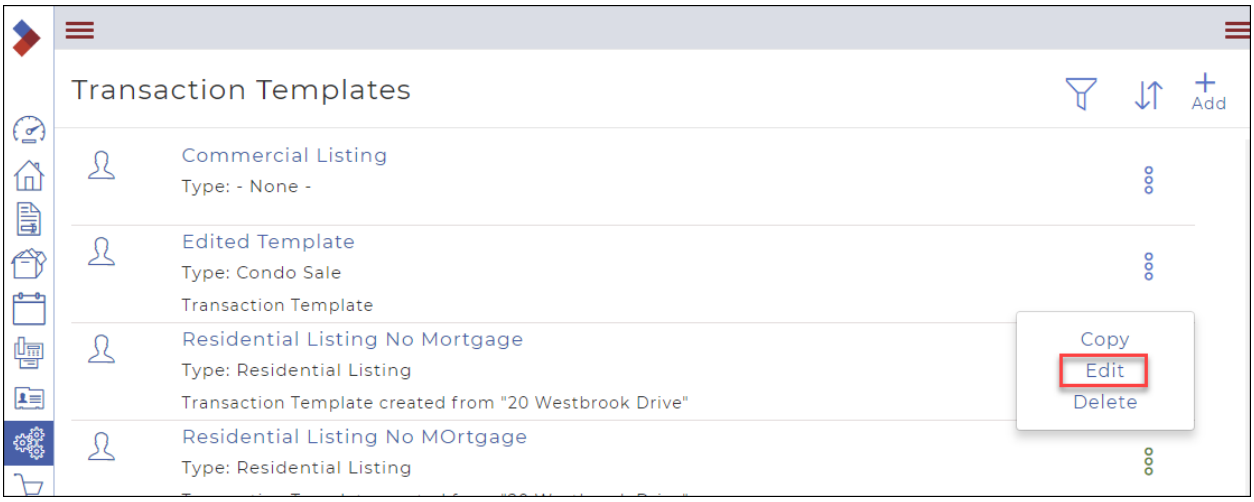
To edit a transaction template:

1. In the left sidebar, click **Setup** .
   The **Setup Window** displays.

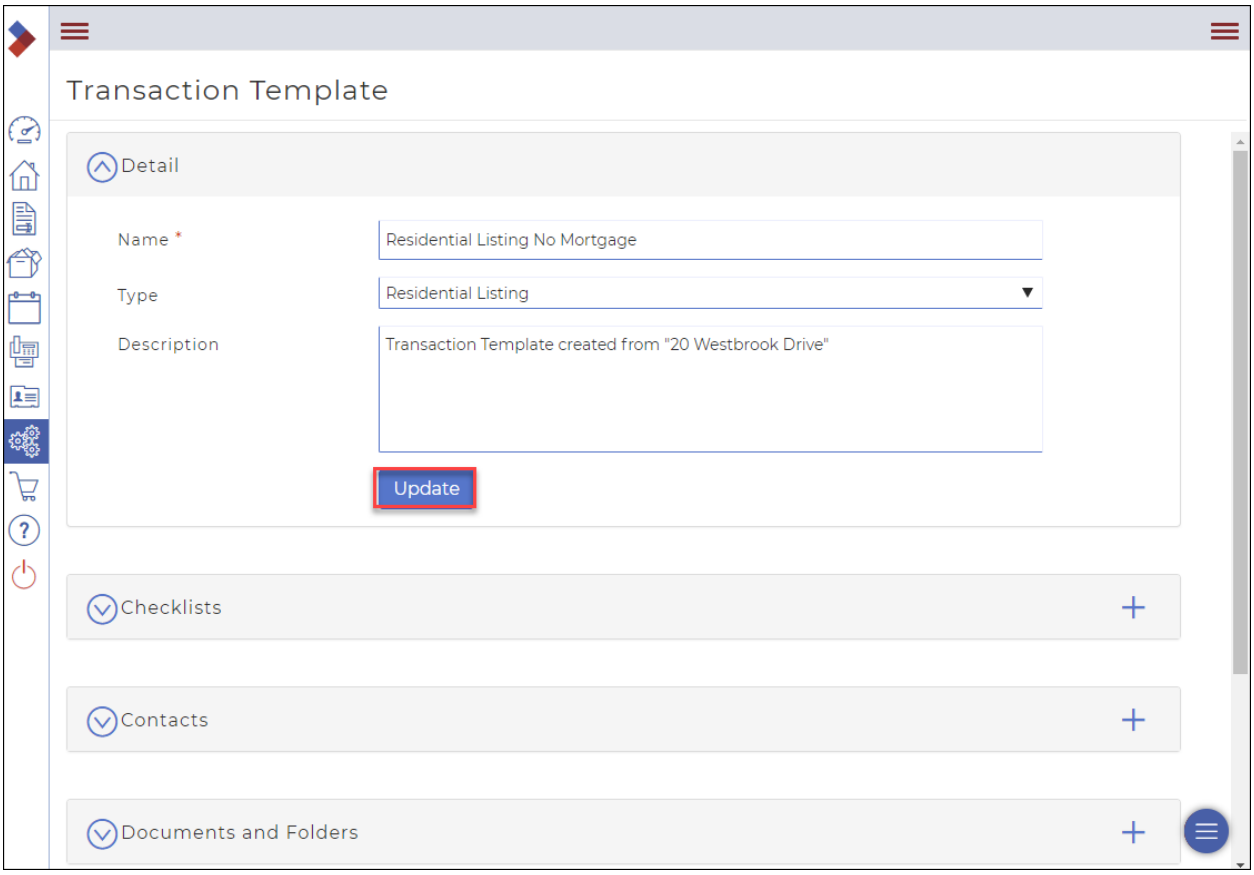
2. Click **Transaction Templates**.
   The **Transaction Templates** window displays.



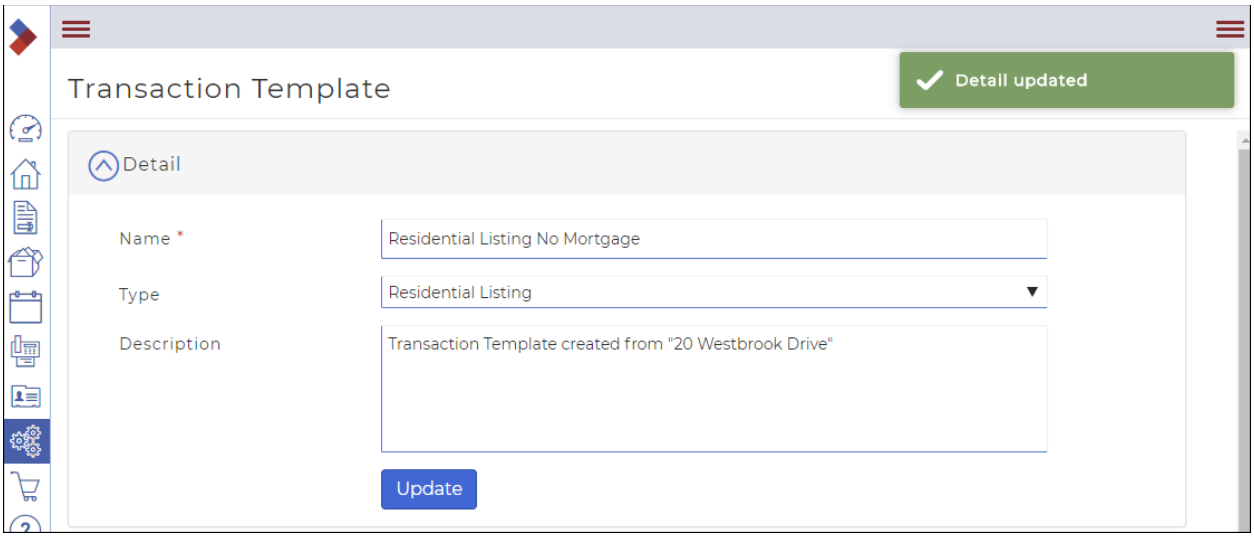
3. Click the **Ellipses Menu** .
   The dropdown displays a list of actions.



4. Click **Edit**.
   The **Transaction Template** window displays.



5. Make any necessary edits to the transaction template, then click **Update**.
   A confirmation message briefly displays in the top right.



Applying a template to an existing transaction

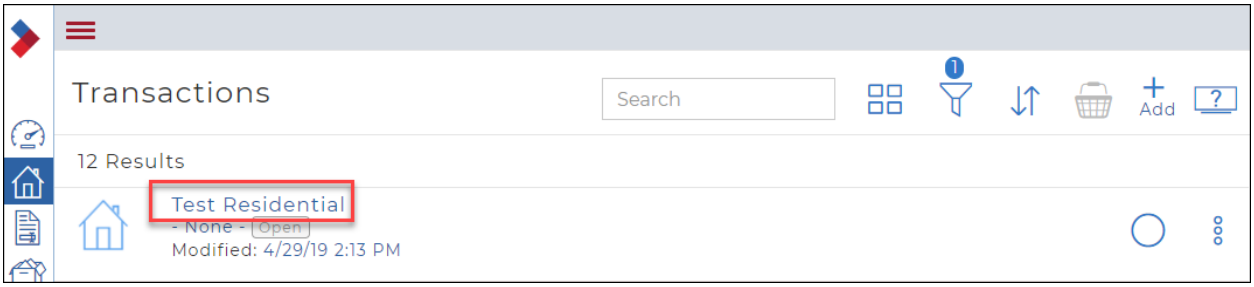
You may encounter a situation where a transaction was created without using a template. You can apply a template to the transaction even after it is created, which then attaches any requisite forms, documents, or checklists to the transaction.

Note: The transaction template must exist before you can apply it to a transaction.

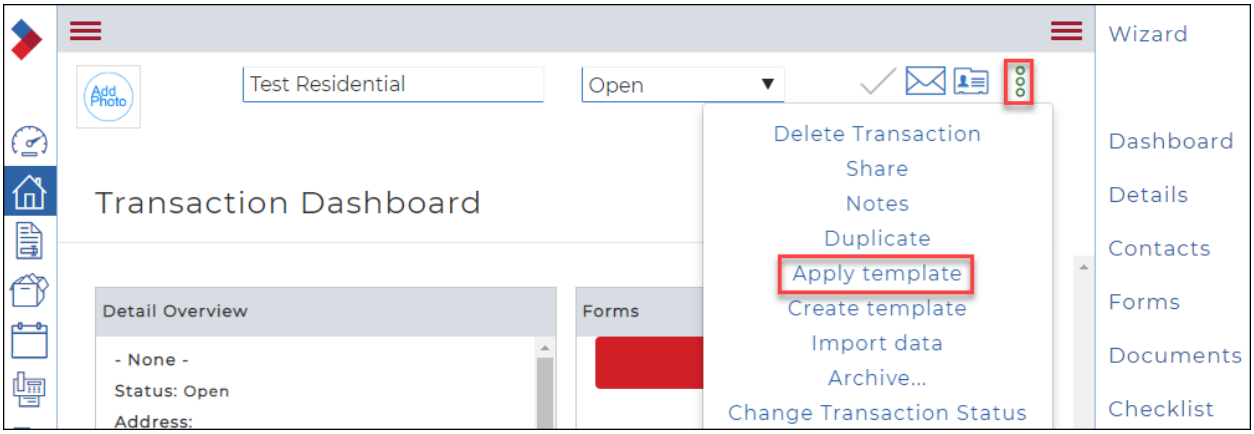
CLICK TO VIEW VIDEO

To apply a template to an existing transaction:

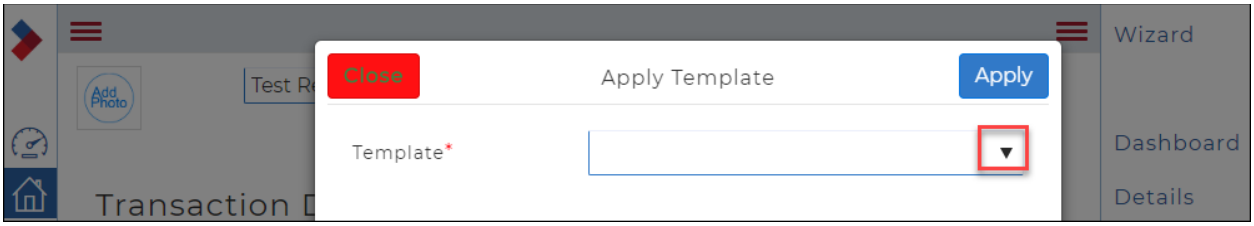
1. Click **Transaction**s in the Sidebar.
   Your **Transactions** display.



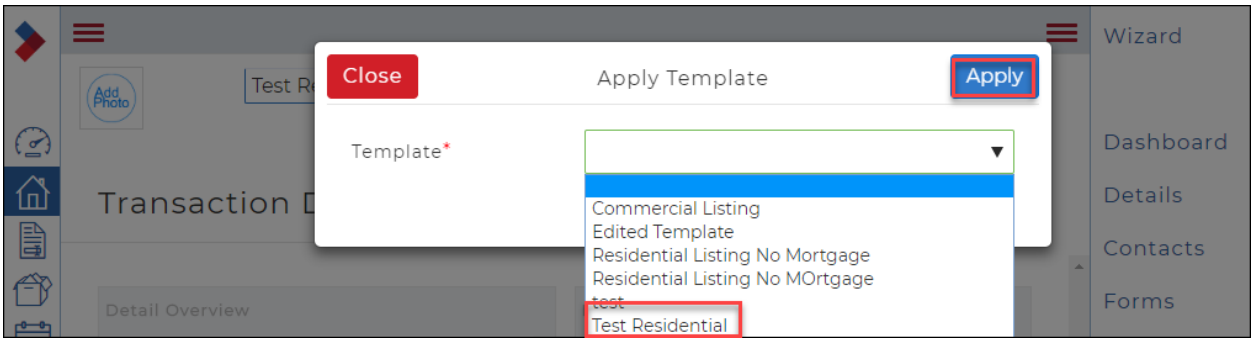
2. Click the transaction name to open the transaction.
   Your **Transaction Dashboard** displays.



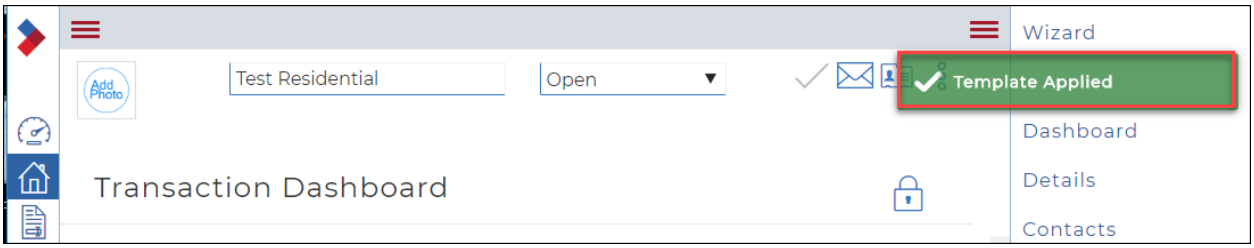
3. Click the **Ellipses Menu** ⋮ to display a dropdown menu.
4. Click **Apply Template**.
   The **Apply Template** dialog box displays.



5. Click the dropdown arrow to display a list of available templates.



6. Select the template you want to apply.
7. Click **Apply**.
   A brief message will display in the upper right corner that the template was applied.



The transaction is updated with all the same contacts, forms, documents, and checklists as were in the template. You can edit the transaction to add or remove items.

Working with Documents

Use Documents to store, organize, manage, access, and work with your documents.

This section includes:

Understanding documents

Uploading a document to a transaction

Uploading a revised document to a transaction

Uploading a document to a folder

Uploading a document using the document upload widget

Downloading a document

Downloading a document as a .zip file

Renaming a document

Merging and slicing a document

Marking up a document

Printing a document

Deleting a document

Emailing a single document

Emailing multiple documents

Emailing a document from a transaction

Emailing multiple documents from a transaction

Emailing a document to a fax machine

Faxing a single document

Faxing a document from a transaction

Faxing multiple documents

Organizing the document folders

Understanding documents

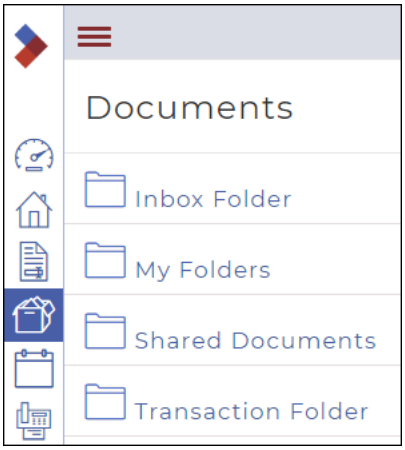
In the system, a document is distinct from a form. Forms represent legal contracts that are filled out interactively online. They are usually provided by your board, association, or broker, and are reviewed to ensure compliance and protect all involved parties legally.

Documents are any other type of information that you collect regarding the deal from your client or other third party. They are not interactive, and where applicable, are filled in outside of the system. Listing photos, scanned pen-and-paper contracts, scanned receipts of deposit checks, commission disbursements, lawyer letters, commission statements, and client profiles are common examples of documents. You can store documents in the following file formats:

- .pdf
- .doc

- .docx
- .xls
- .xlsx
- .jpg/.jpeg
- .gif
- .bmp
- .tif
- .png

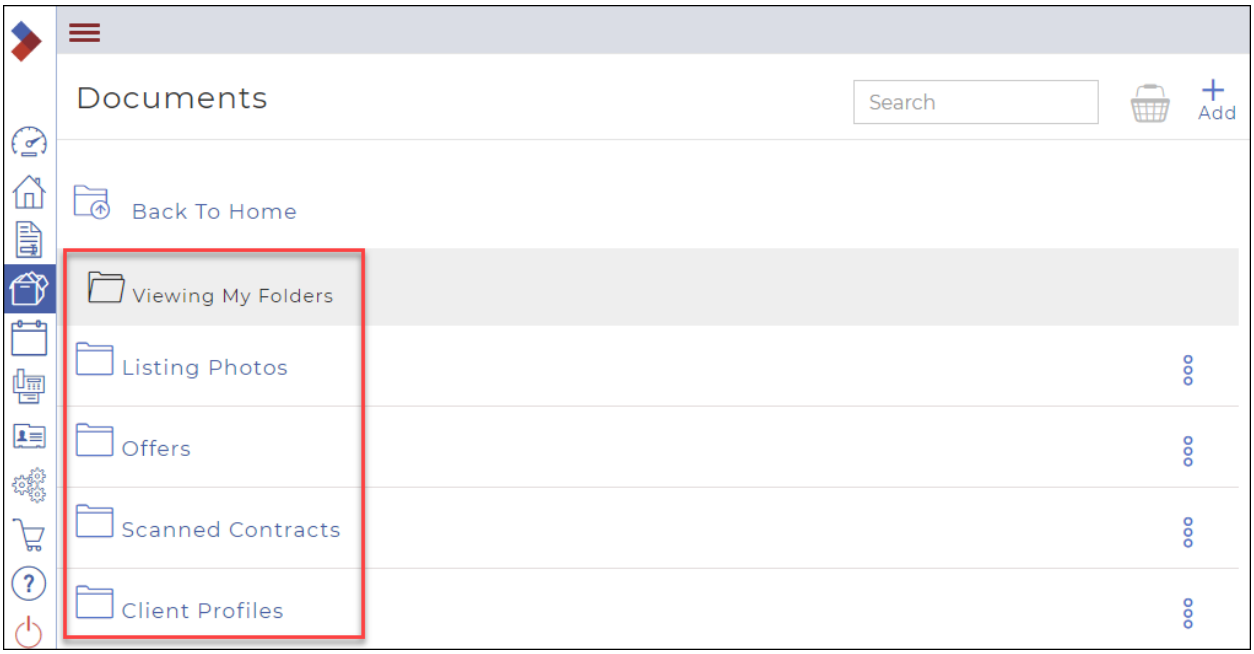
Documents uses a file manager-style system to organize, access, and manage your documents in folders and sub-folders.



By default, the system includes four main folders with their own unique purposes:

Folder Name	Purpose	Able to Add Documents Directly to Folder?	Able to Create Sub-Folders?
Inbox Folder	Any documents that are emailed to your account are stored in this folder automatically	Yes, automatically, when you email a document to the system	No
My Folders	Any documents you manually upload to dicuments are stored in sub-folders that you create, organize and manage	No	Yes
Shared Documents	Documents that other users share with you are stored in this folder automatically	Yes, automatically, when a user shares a document with you	No
Transaction Folder	Every time you create a transaction, a new transaction folder for that deal is created in documents	No	No. Subfolders are created automatically when you create a transaction

***Note**: The My Folders folder is unique in that you have full control over the sub-folder structure within it and the documents that are added to those sub-folders. For example, you can create different sub-folder for different types of documents, to better keep them organized, such as a photos folder, a contracts folder, or a client profiles folder.*



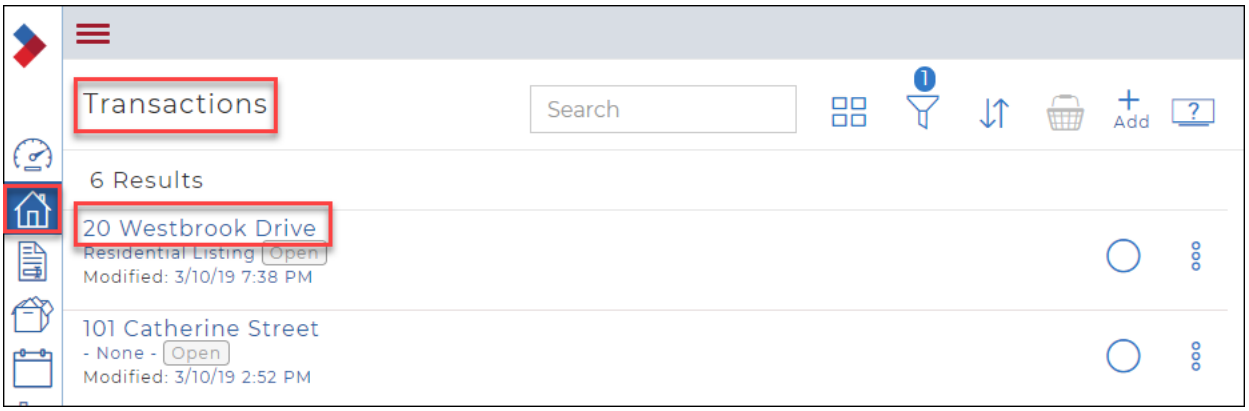
Uploading a document to a transaction

You can upload a document and attach it directly to a transaction.

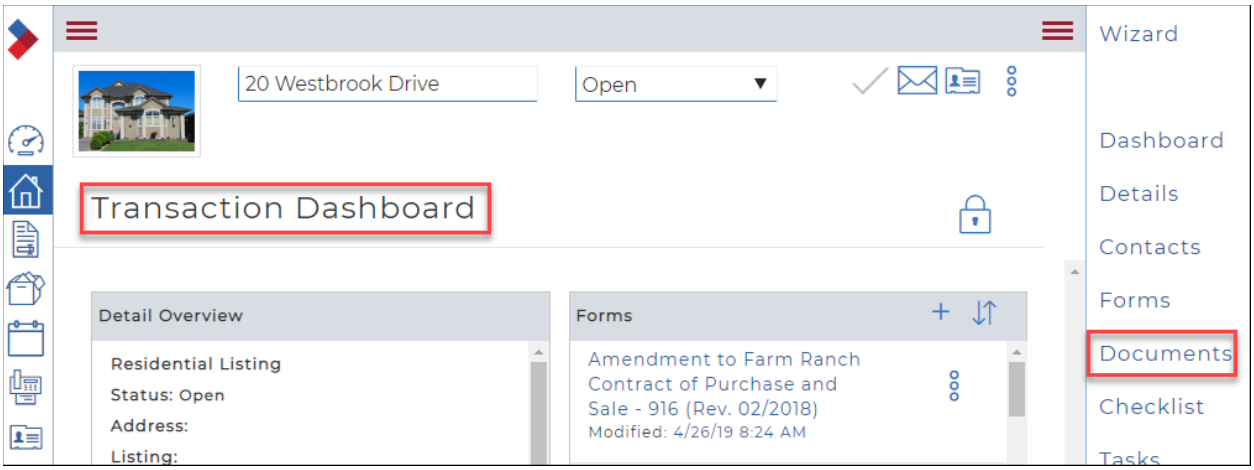
CLICK TO VIEW VIDEO

To upload a document to a transaction:

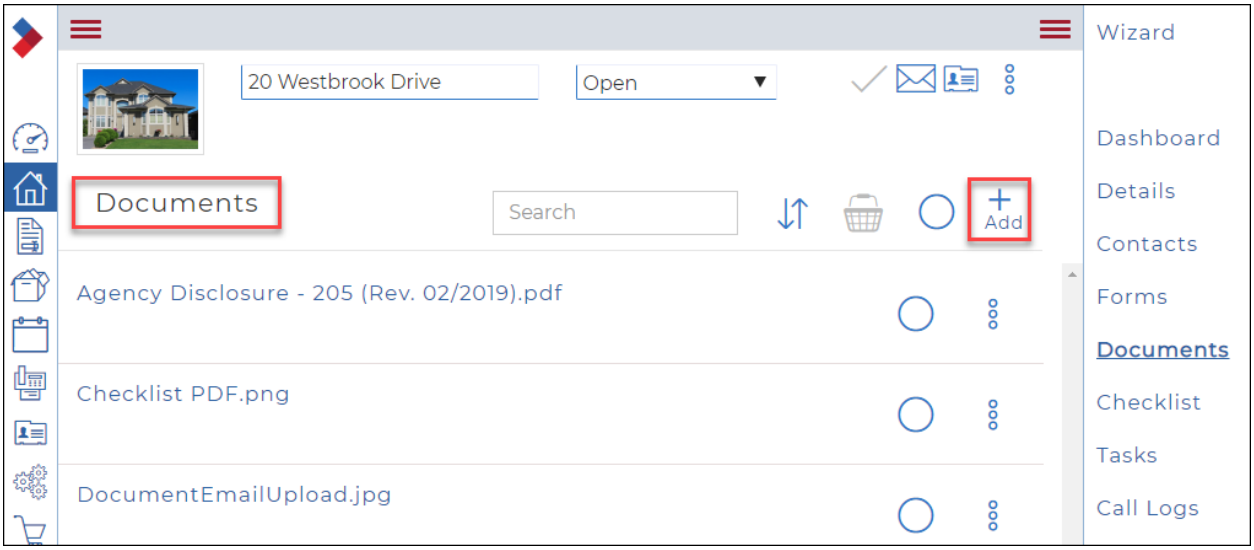
1. In the **Sidebar**, click **Transactions** .
   Your list of transactions displays.



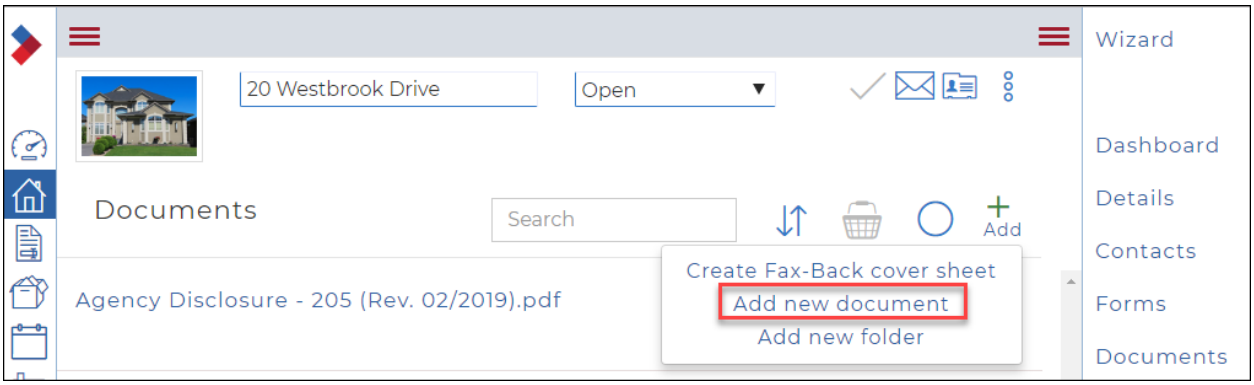
2. Click the transaction you want to upload the document to.
   The **Transaction Dashboard** displays.



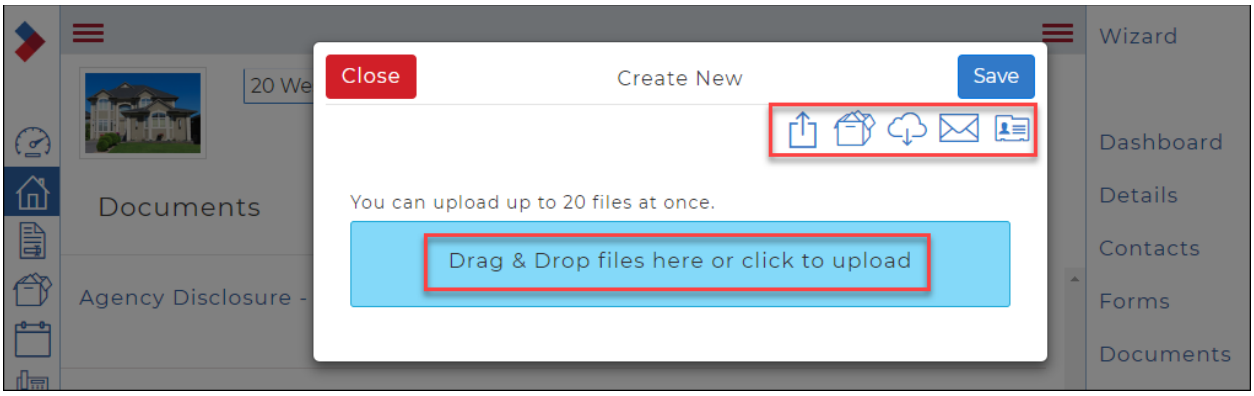
3. On the right-hand menu, click **Documents**.
   The list of documents attached to the transaction displays.



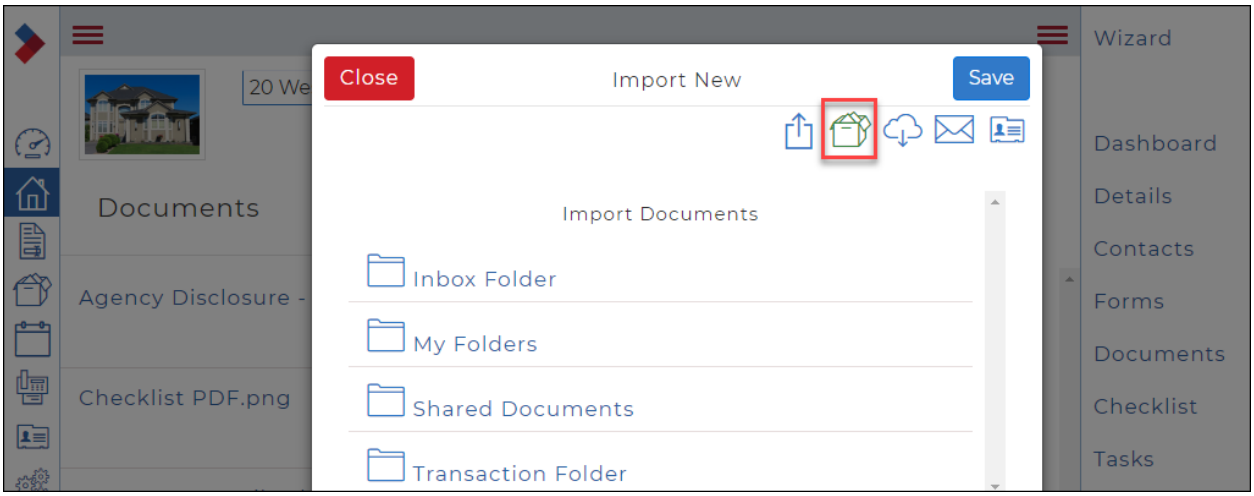
4. Click **Add**.
   A dropdown menu displays several actions.



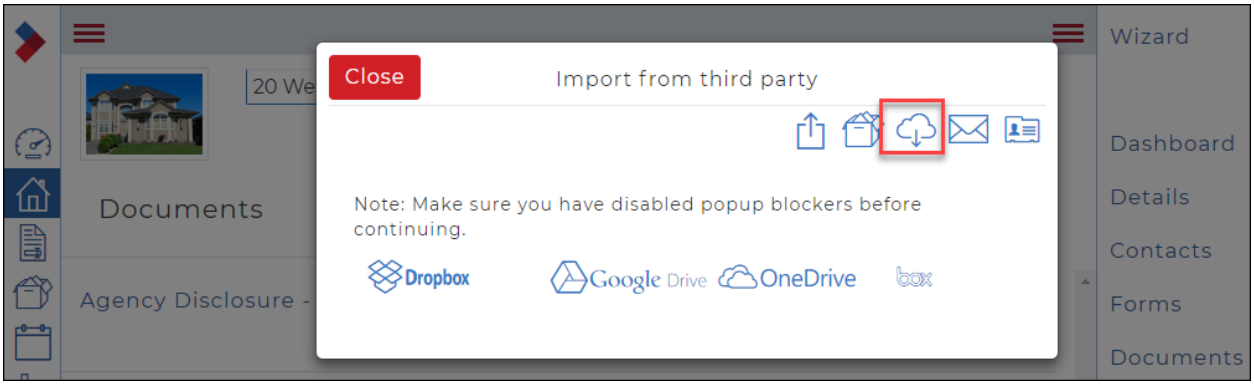
5. Click **Add new document**.
   The **Create New document** dialog box displays.



6. Do one or more of the following:
   A. **Drag & Drop or Upload**
      - Drag and drop files from your computer to the **Drag & Drop files here** area, or
      - Click the blue bar to browse for the document(s) you want to upload, or
      - Click **Upload Document** .
   B. **Documents Folder**
      - Click **Documents** to copy documents from your documents folder.
      - Navigate to and select the appropriate document(s).
      - Click **Save**.

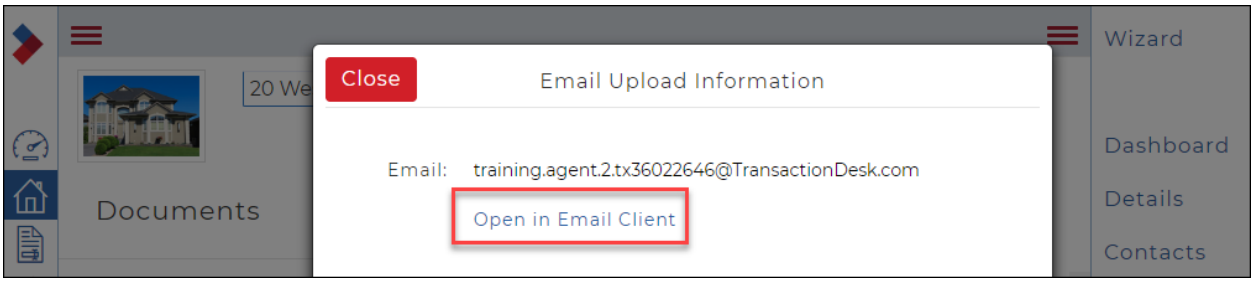


   C. **Import from third party**
      - Click the **Import from third party** to import a document from Dropbox, Google Drive, or another third-party document storage system.
      - Select the appropriate third-party document storage system and locate the document.
      - Click **Add**.

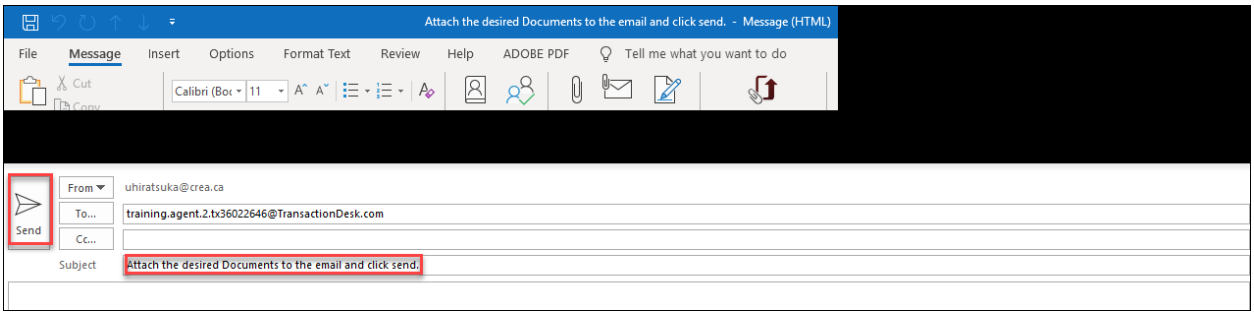


D. **Email**

- Click **Email upload** to upload a document from your email account
- The **Email Upload Information** dialog box displays.

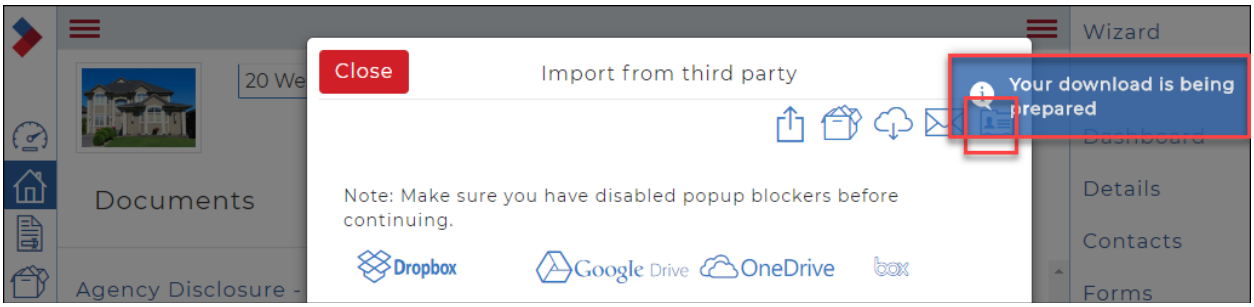


- Click **Open in Email Client**.
- Locate the document.
- Click **Send**.



E. **Download Contact Card**

- Click **Contact Card** to download a contact card for the transaction, so that you can email documents directly to the transaction.
- This adds an email contact to your email. In future, you can email documents directly to this contact, and the documents are attached automatically to the transaction.



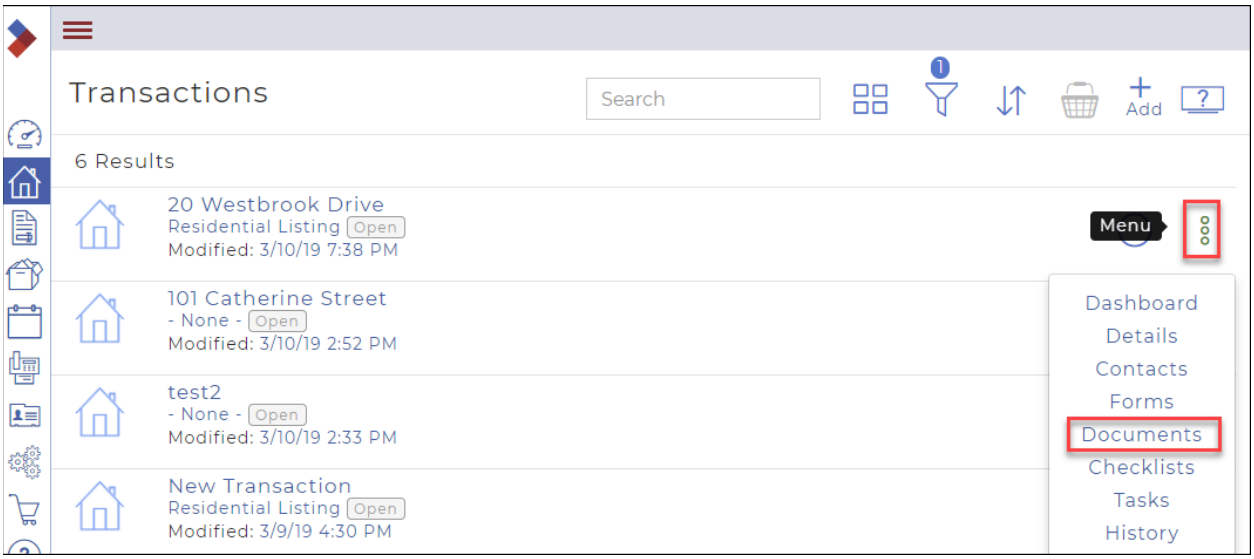
Uploading a revised document to a transaction

A real estate transaction is constantly changing and evolving. The documents associated with a deal are also constantly evolving, requiring revisions. You can use the upload revised documents functionality in the system to upload a revised document to a transaction as a new version. For example, if you had a scanned agreement of purchase and sale from a third party that was missing a signature, and therefore required a revision, you can add the appropriate signature to the agreement, and then re-upload it to the transaction as a revision. Your admin reviews the revised document and can compare it to the previous version if needed.

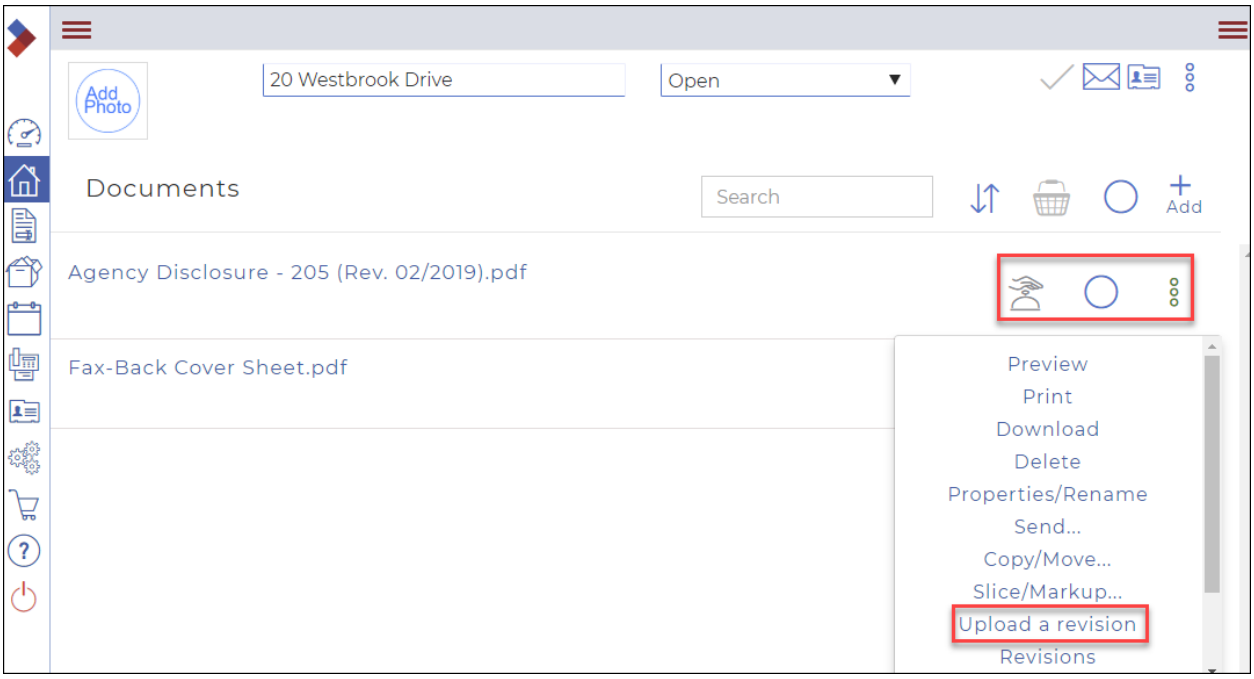
> *Note: You can only upload a document revision for documents that are either requesting review or have been rejected.*

To upload a revised document to a transaction:

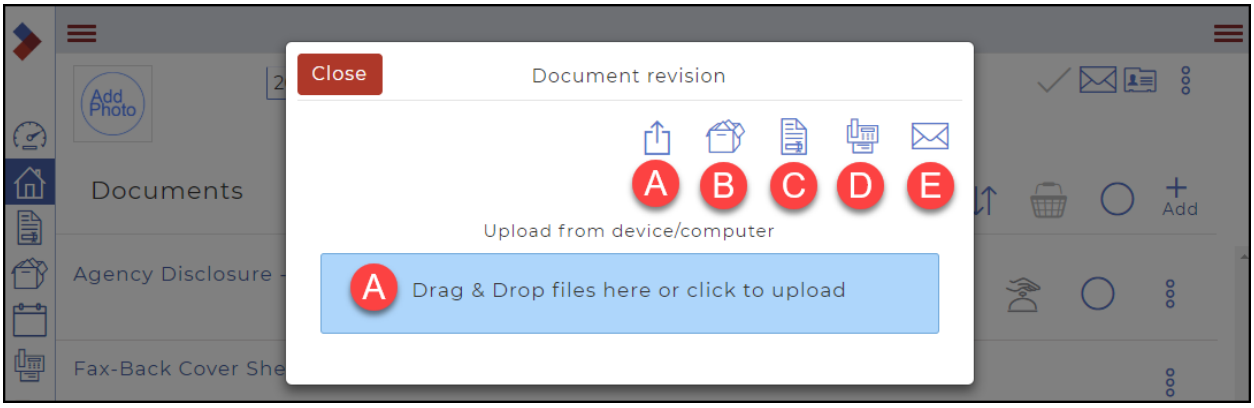
1. In the Sidebar, click **Transactions** .
   The **Transactions Dashboard** displays.
2. Click the **Ellipses Menu** to display the dropdown menu.



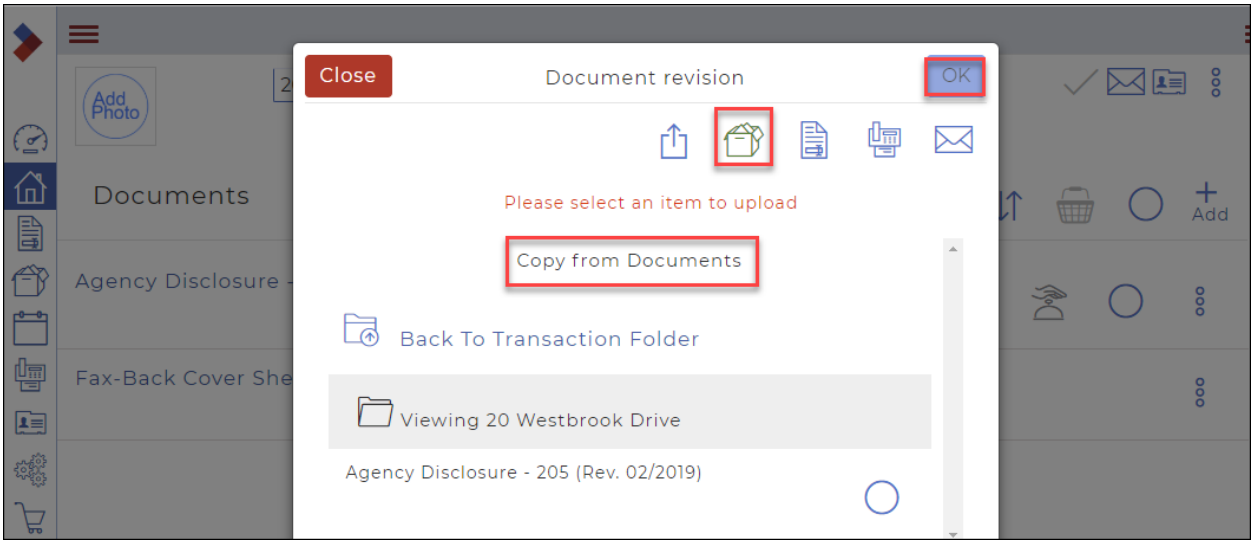
3. Click **Documents**.
   The **Documents** window displays.



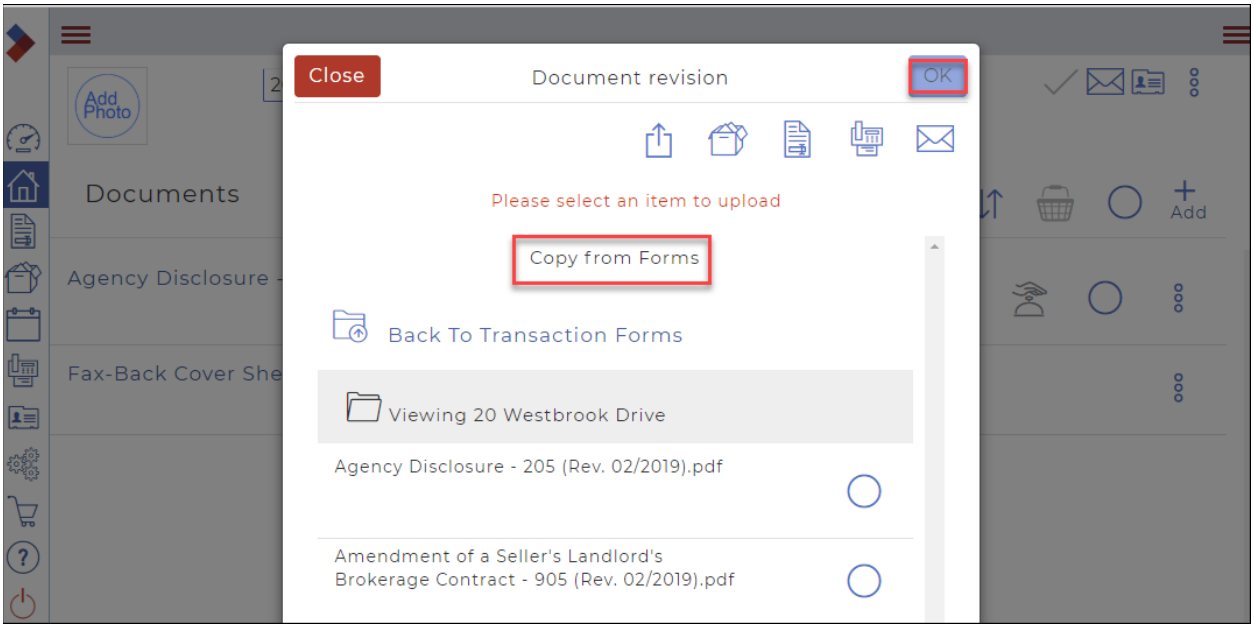
4. Locate the document you need to upload a revised version of and click the **Ellipses Menu** . The dropdown menu displays several actions.
5. Click **Upload a Revision**.
   The **Document Revision** dialog box displays.



6. Do one or more of the following:
   A. To upload a revised document from your computer, click **Upload** . Then drag and drop files from your computer to **the Drag & Drop files here or click to upload** area or click the blue bar to browse for the document(s) you want to upload.
   B. To copy a revised document from your documents folder, click **Documents** . Navigate to and select the appropriate document and click **Save.**



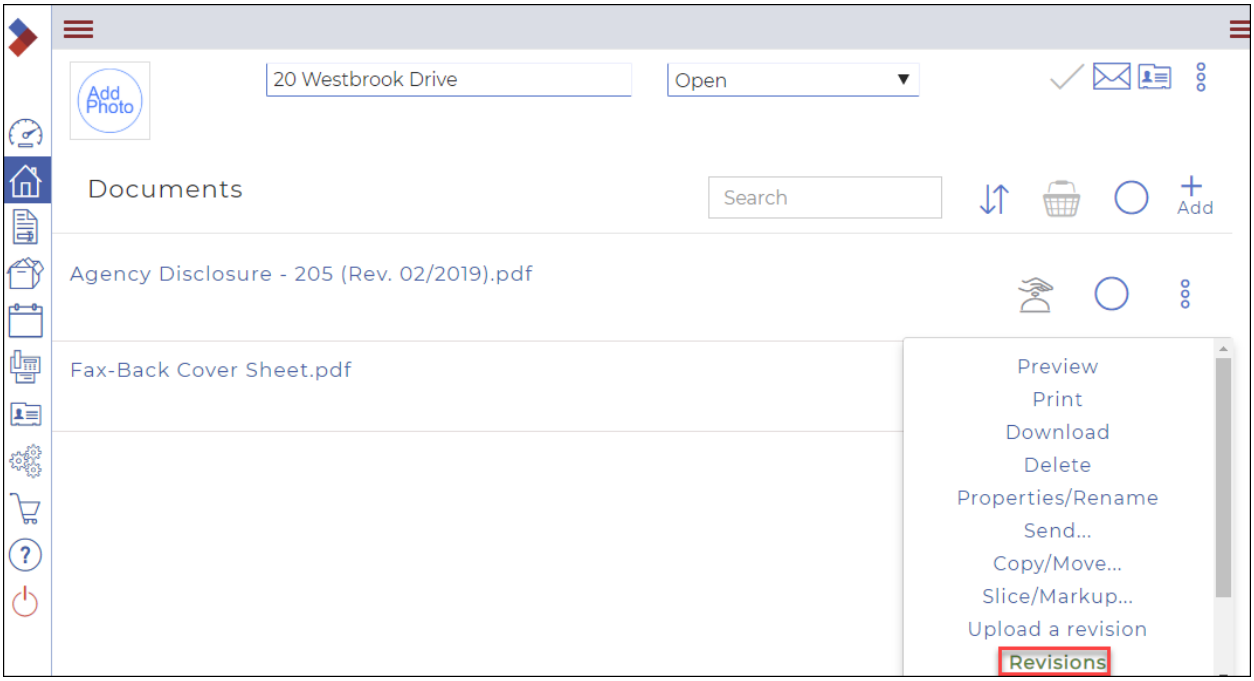
C. To copy a revised document from a form, click **Forms** . Select the appropriate form and click **OK**.



D. To upload a document from your email account, click **Email** .

The revised document is uploaded to the Transaction.

7. Optional: To view any previously revised documents, do the following:
   - Locate the document you need to view your revisions for.
   - Use the **Ellipses Menu** to select **Revisions**.



The **Previous versions** dialog box opens and displays the list of all versions of this document that were uploaded but required revisions on this deal.

Uploading a document to a folder

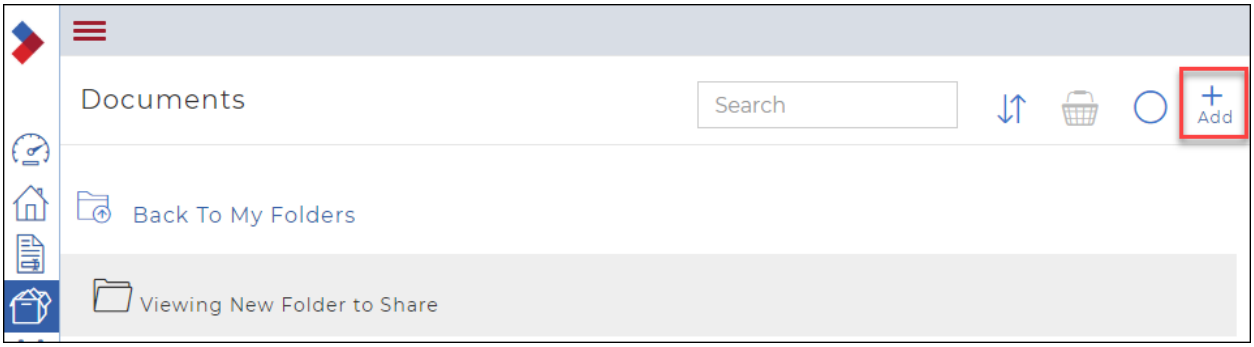
Note: To upload a document into a folder in Documents, the folder must first exist.

CLICK TO VIEW VIDEO

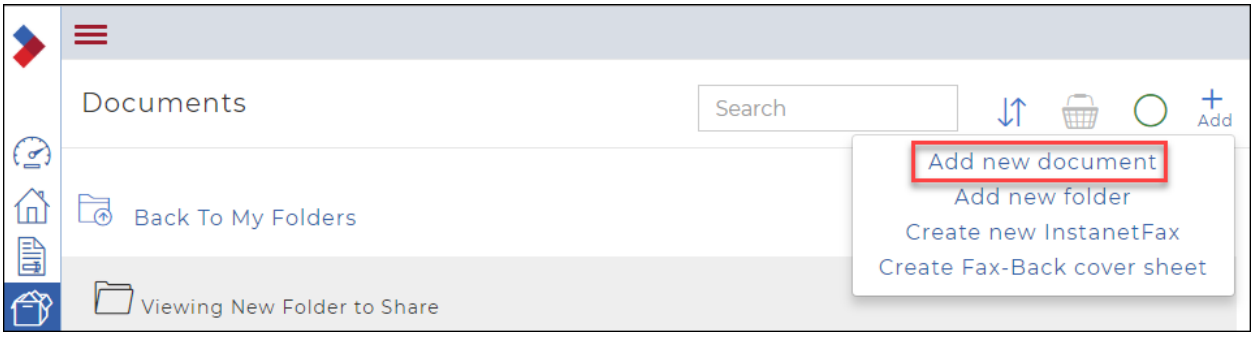
To upload a document to a folder:

1. In the left Sidebar, click Documents .
   The **Documents** window displays.

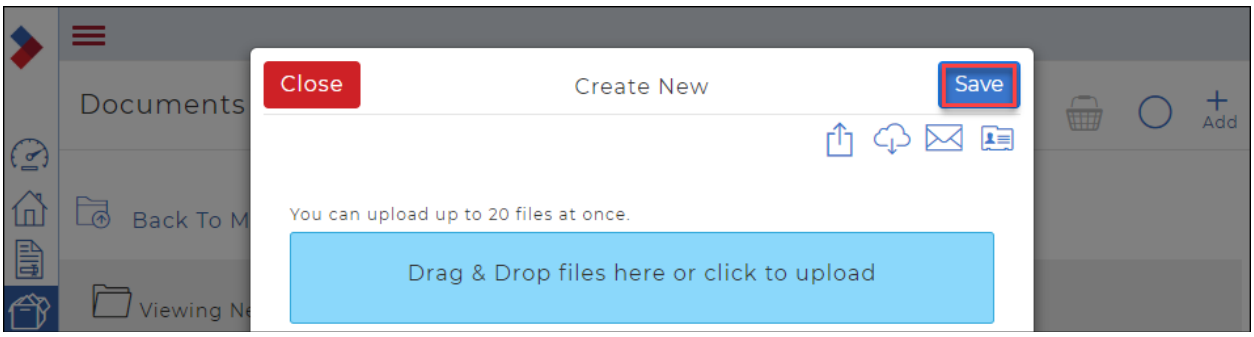
2. Click **My Folders**, then navigate to the folder into which you want to upload a document.



3. Click **Add**.
   A dropdown menu displays.



4. Click **Add new document**.
   The **Create New** dialog box displays.



5. Do one of the following:

- Drag and drop the file from your computer to the **Drag & Drop** files here area.
- Click the blue bar to browse for the document you want to upload, select the document, and click **Open**.
- Click **Upload from device/computer**
- Click **Import from third party**
- Click **Email Upload** CLICK TO VIEW VIDEO

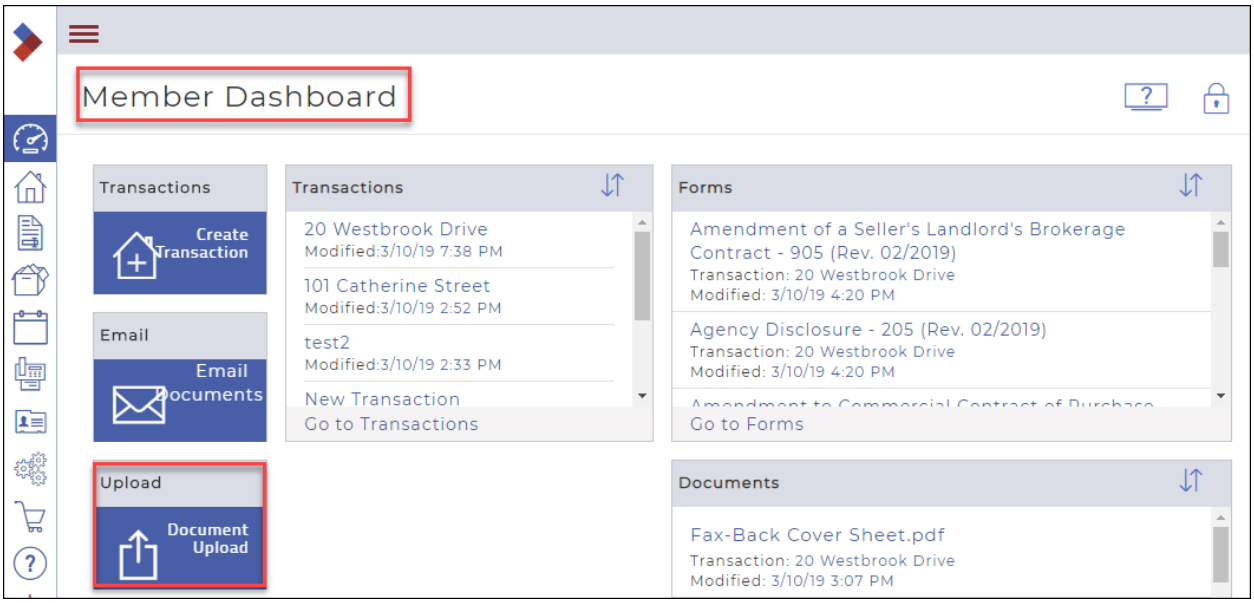
6. Click **Save.**

Uploading a document using the upload widget

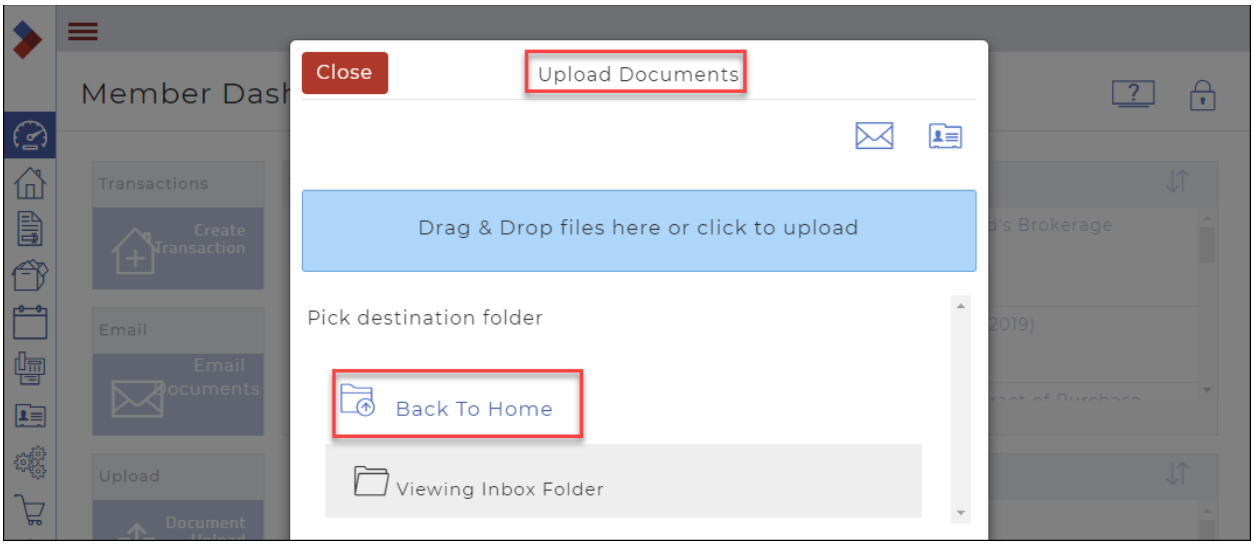
Note: To upload a document into a folder in Documents, the folder must first exist.

To upload a document to a folder using the Document upload widget :

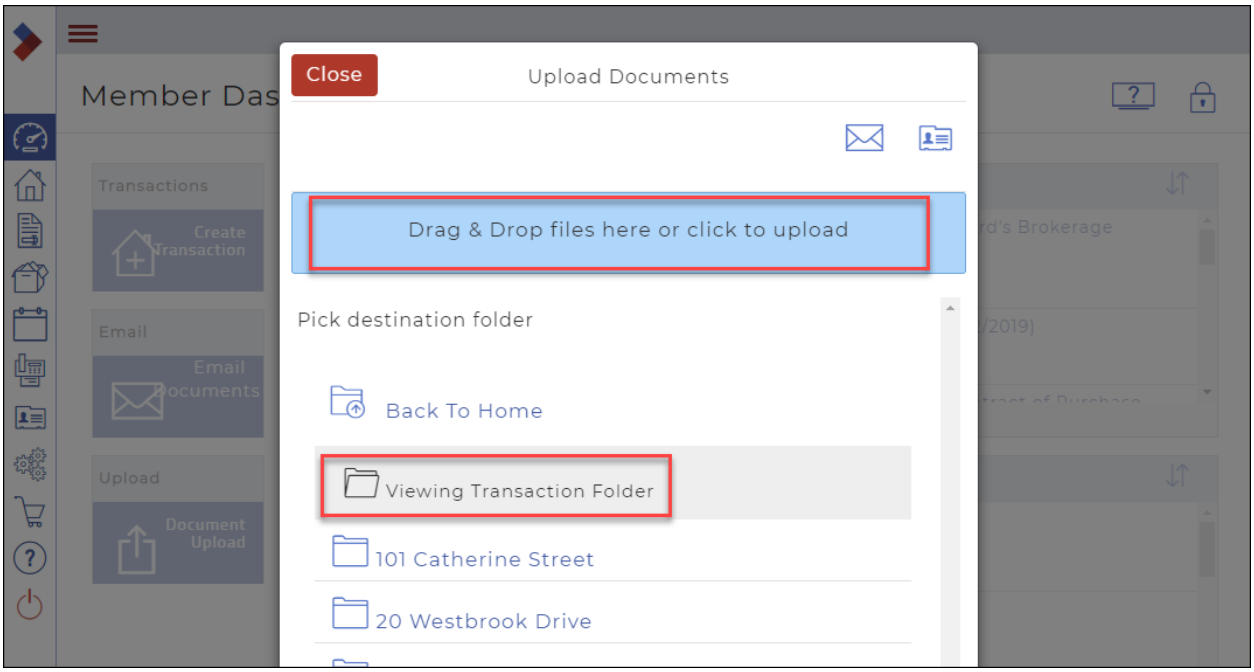
1. In the Sidebar, click **Dashboard**.
   Your **Member Dashboard** displays.



2. In the **Upload** widget, click **Document Upload**.
   The **Upload Documents** dialog box displays.

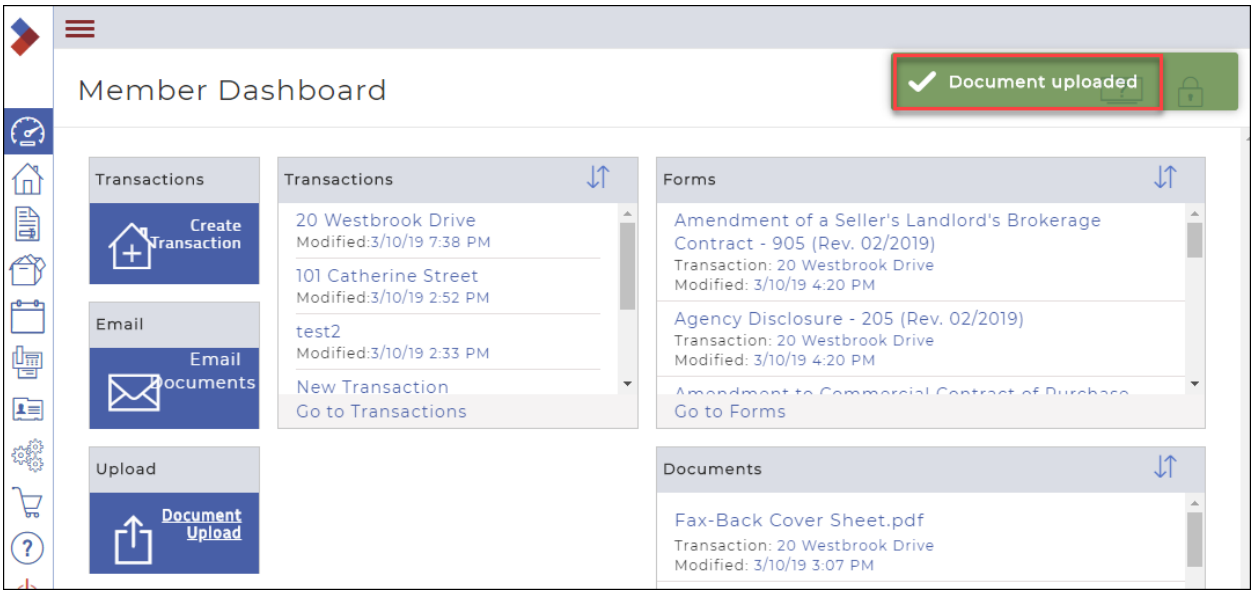


3. Click **Back to Home** and navigate to the folder where you want to upload the document.



4. Do one of the following:
   - Drag and drop the file from your computer to the **Drag & Drop** files here area.
   - Click the blue bar to browse for the document you want to upload, select the document, and click **Open**.

   A confirmation message briefly displays in the top right, and you are returned to the Member Dashboard.



Downloading a document

You can download any documents that are added to the Inbox, My Folders, Shared, and Transaction folders in Documents. The ability to download documents allows you to conduct business without having to carry around folders full of blank documents of all types. Instead, you can download your documents as needed, and distribute or fill them out from anywhere with internet access. For example, if you are out of the office, and have a listing presentation that you need to attach to a deal, you can download a blank listing template document from Documents, complete the presentation on your computer, and then re-upload the presentation to a specific deal folder.

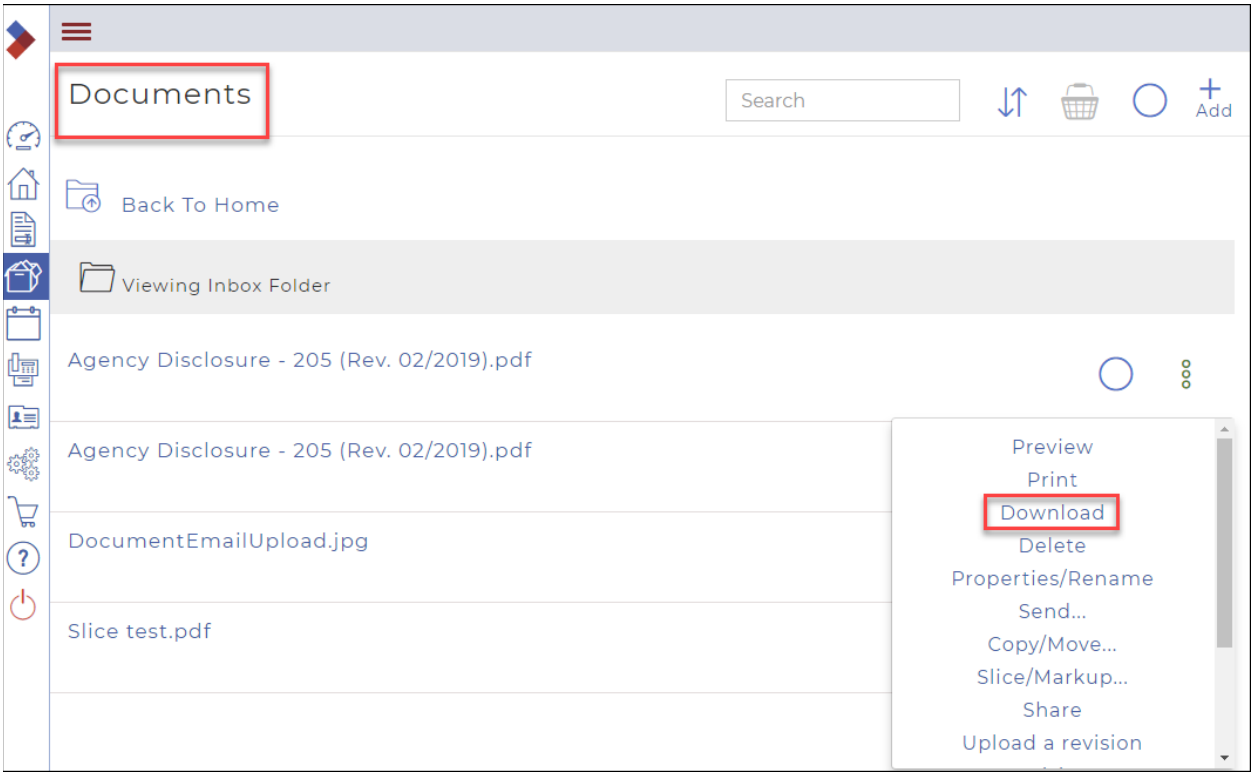
You can download documents

- contained in the Inbox, My, Shared, and Transaction folders in Documents, and
- from a transaction.

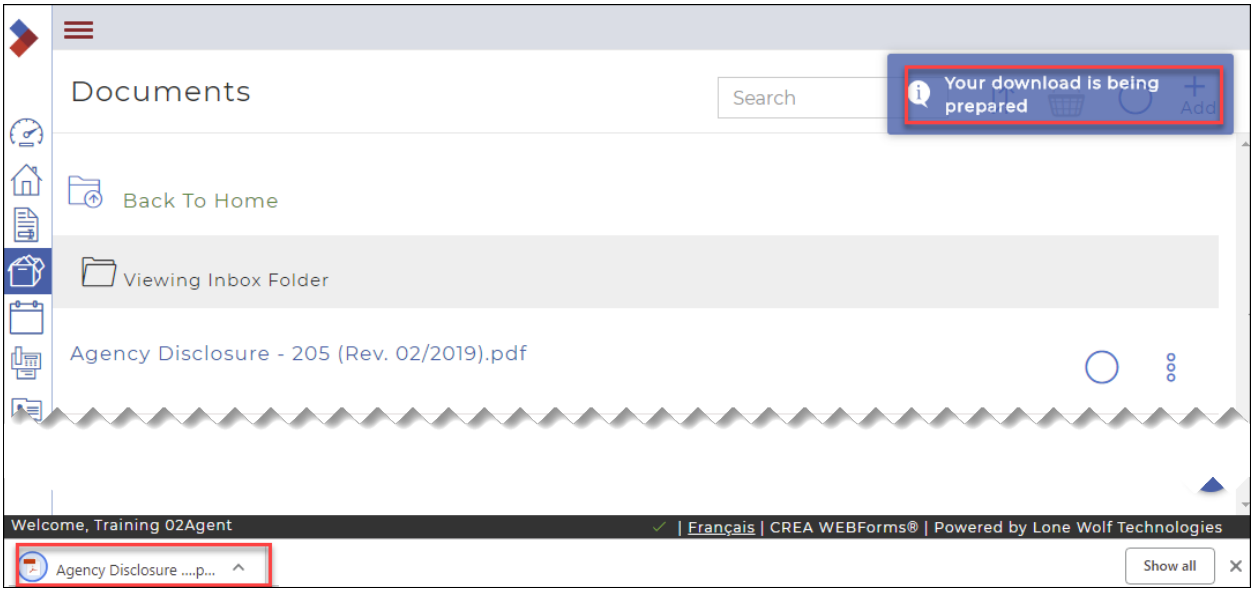
To download a document:

1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Locate the document you want to download and click the **Ellipses Menu** beside the document.
   The dropdown menu displays several actions.

3.



3. Click **Download.**
   A confirmation message briefly displays in the top right, and the selected document is downloaded to your device.



Downloading a document as a .zip file

You can download any documents that are added to the Inbox, My Folders, Shared, and Transaction folders in Documents. The ability to download documents allows you to conduct business without having to carry around folders full of blank documents of all types. Instead, you can download your documents as needed, and distribute

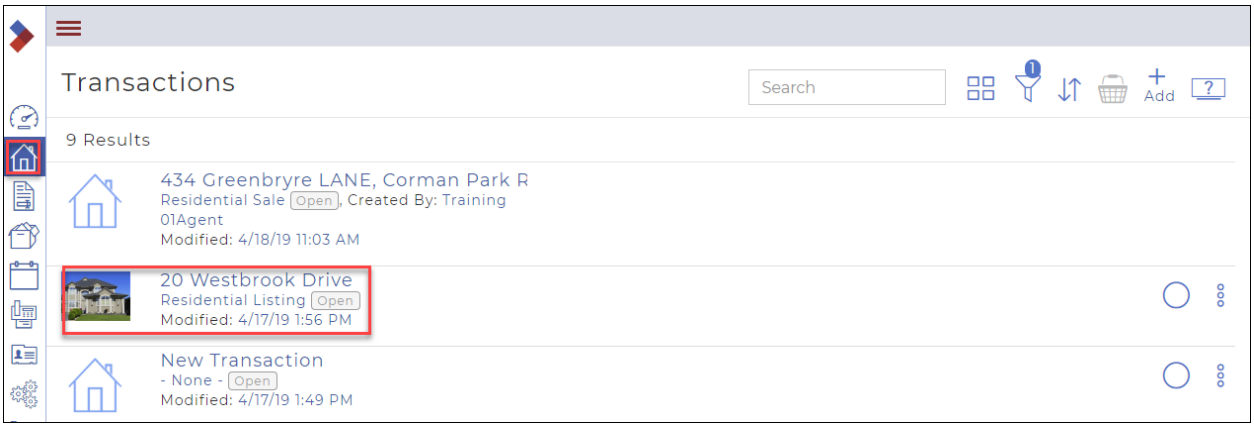
or fill them out from anywhere with internet access. For example, if you are out of the office, and have a listing presentation that you need to attach to a deal, you can download a blank listing template document from Documents, complete the presentation on your computer, and then re-upload the presentation to a specific deal folder.

You can download documents

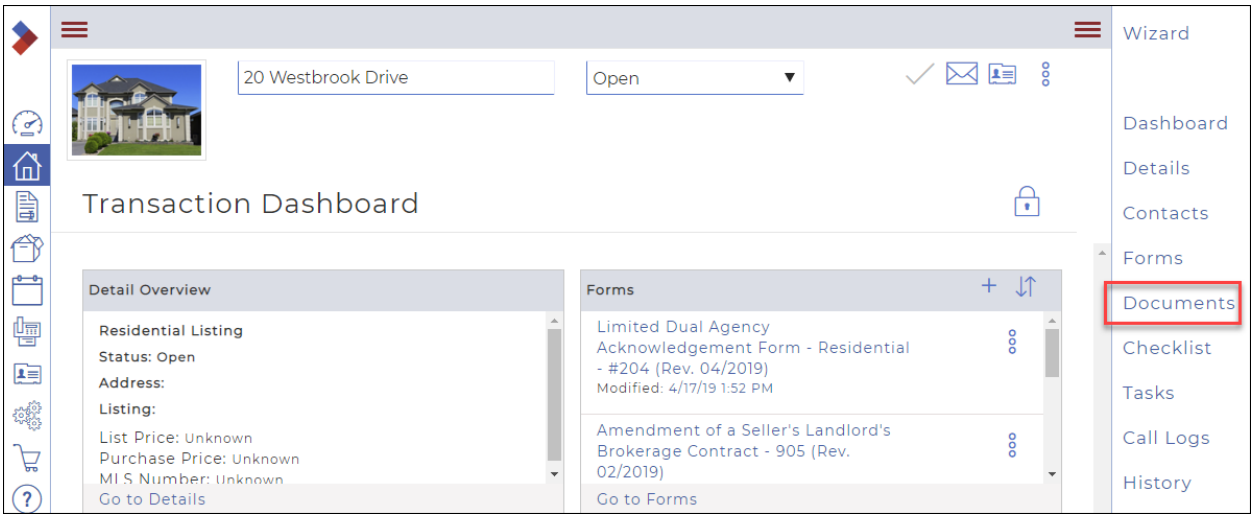
- from a transaction, and
- contained in the Inbox, My, Shared, and Transaction folders in Documents.

To download a document from a transaction:

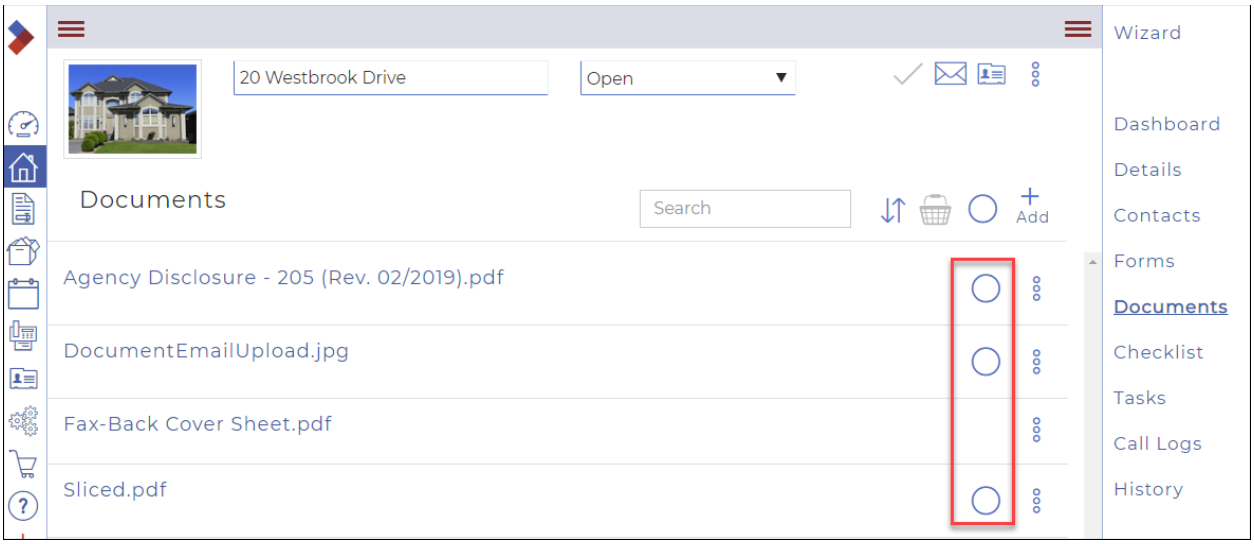
1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



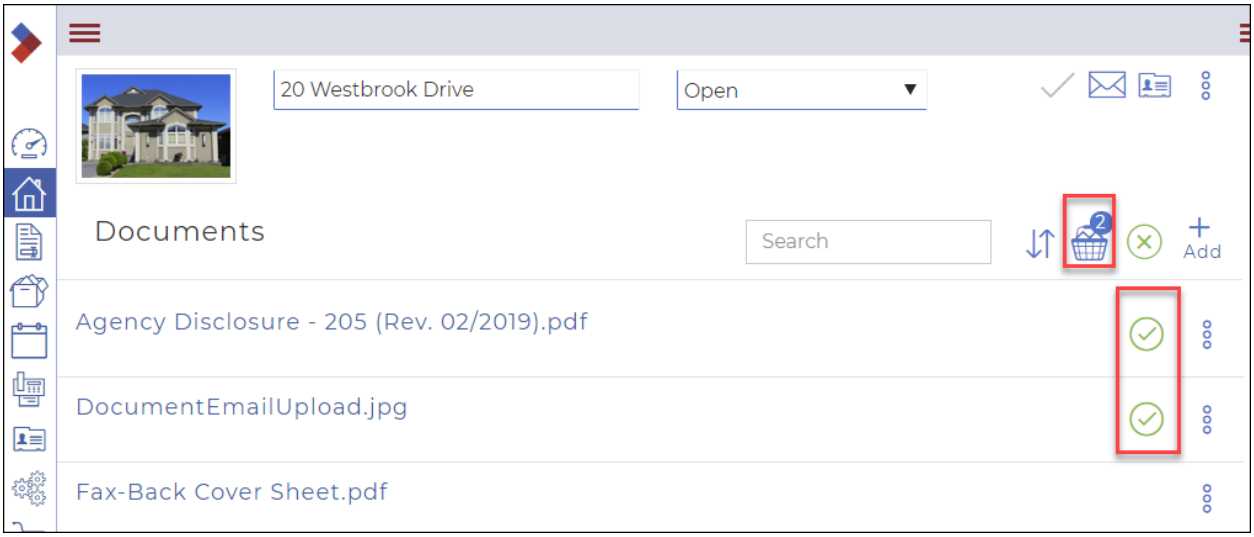
2. Click the name of the transaction from which you want to delete a document.
   The **Transaction Dashboard** displays.



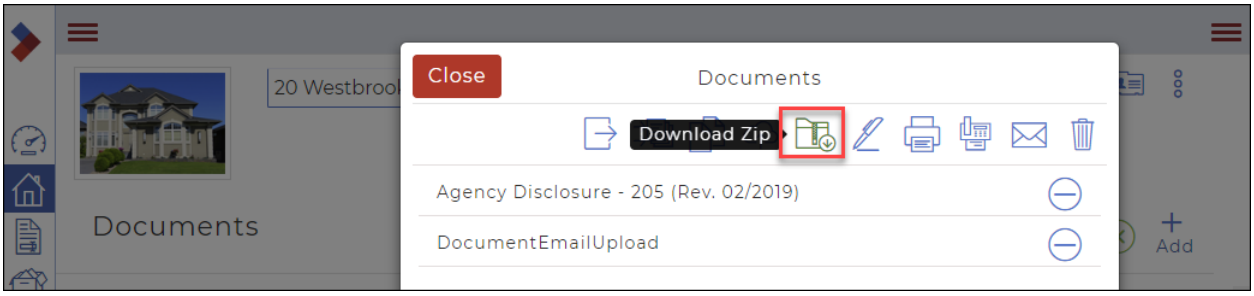
3. In the right sidebar, click **Documents**.
   The list of documents displays.



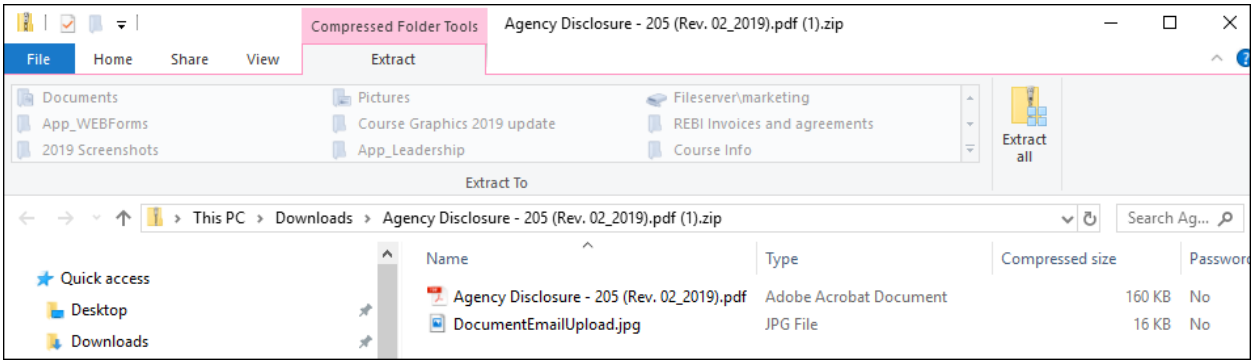
4. Click the selection circle beside the documents you want to download.
   They are added to the basket.



5. Click the **Basket** .
   The **Documents** dialog box displays.



6. Click **Download Zip** .
   The downloaded files will display in your Downloads folder.



7. Click **Close**.

You have now downloaded documents from a transaction.

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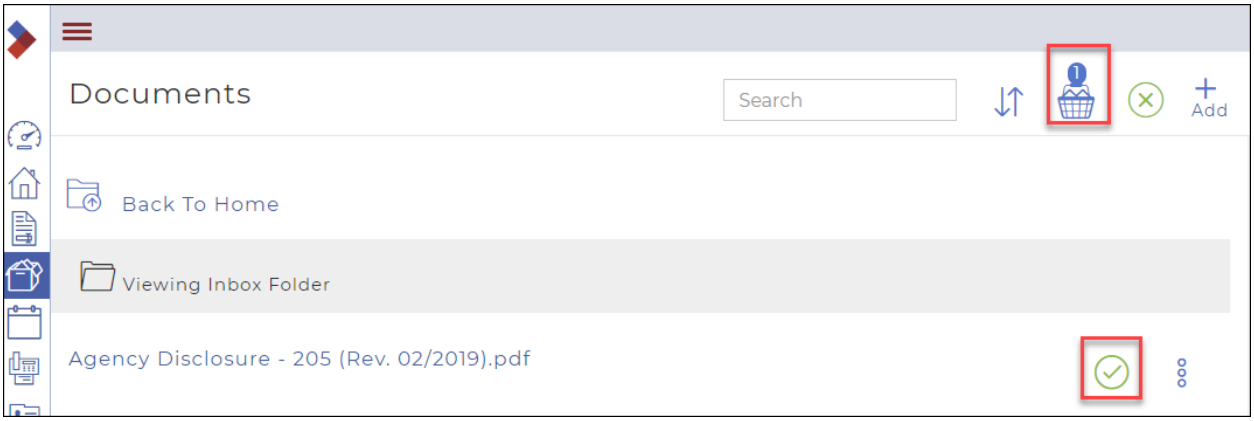
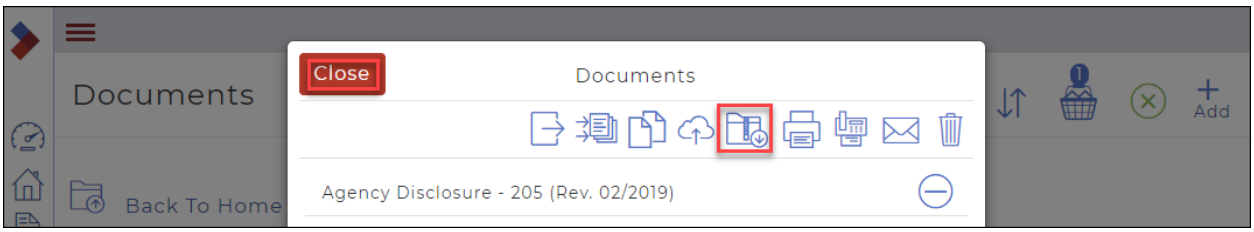
To download a document contained in the Documents folders:

1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Locate the document you want to download and click the **Select** circle .
   The document will be added to the basket and the total number of selected documents will display.

   Note: You can check multiple documents.

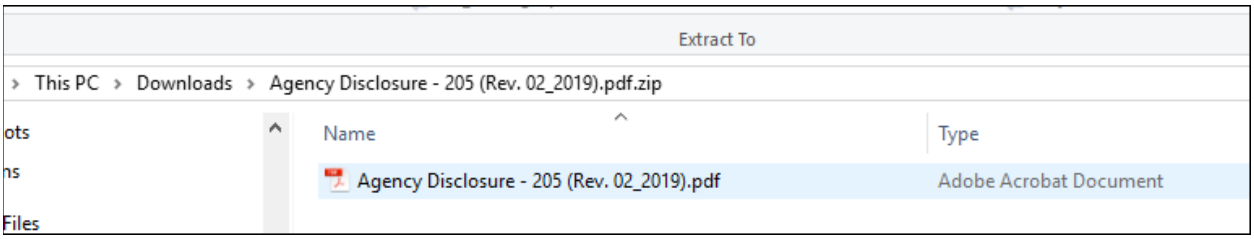


3. Click the **Basket** .
   The **Documents** dialog box displays.



4. Click **Download Zip** .

5. The selected document is downloaded to your device as a .zip file.



6. Click **Close**.

Renaming a document

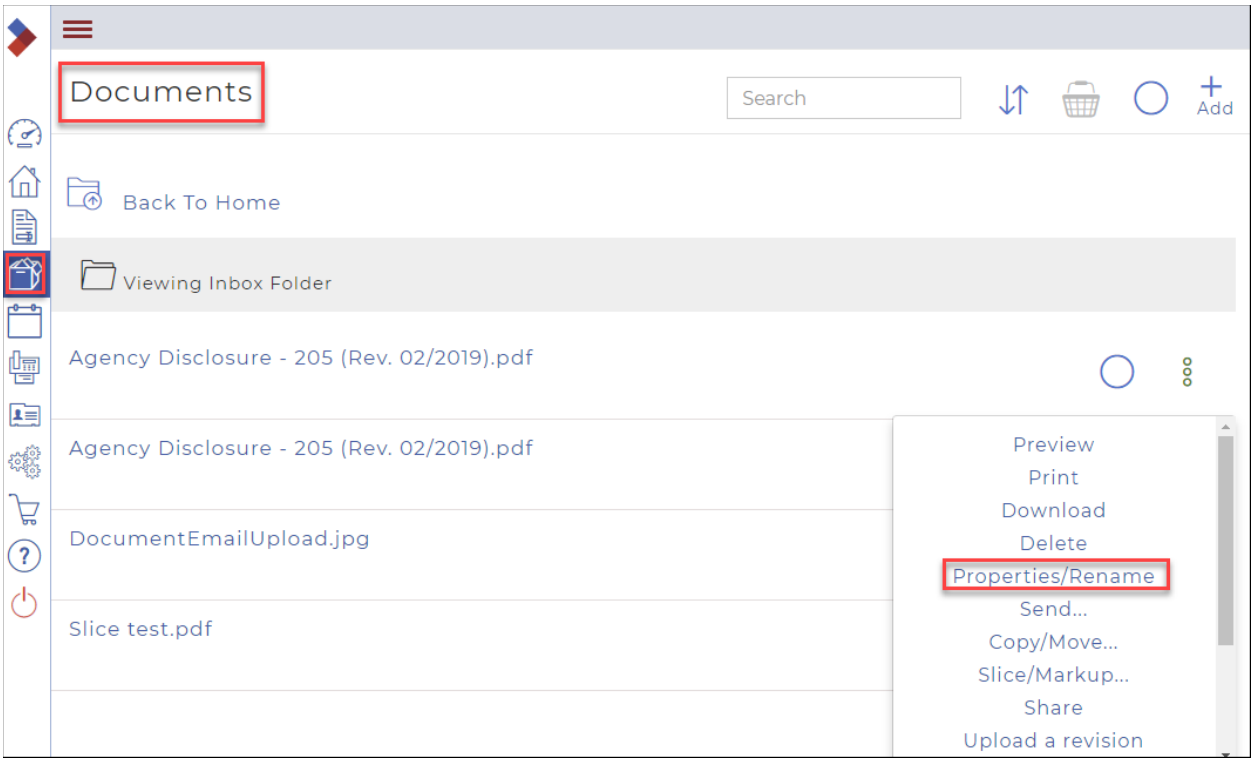
You can rename any documents in your Document folders at any time to keep your documents organized and easy to locate. For example: When a document is scanned and emailed to the system, the scanner typically automatically names the emailed file with an alphanumeric name, such as X3948230-A. An alphanumeric name does not typically give a good indication as to what the document is, so it is useful to rename such documents with more user-friendly names, such as Listing Photos 429 CanAmera Parkway, in order to make them easier to identify in the system.

You can rename documents

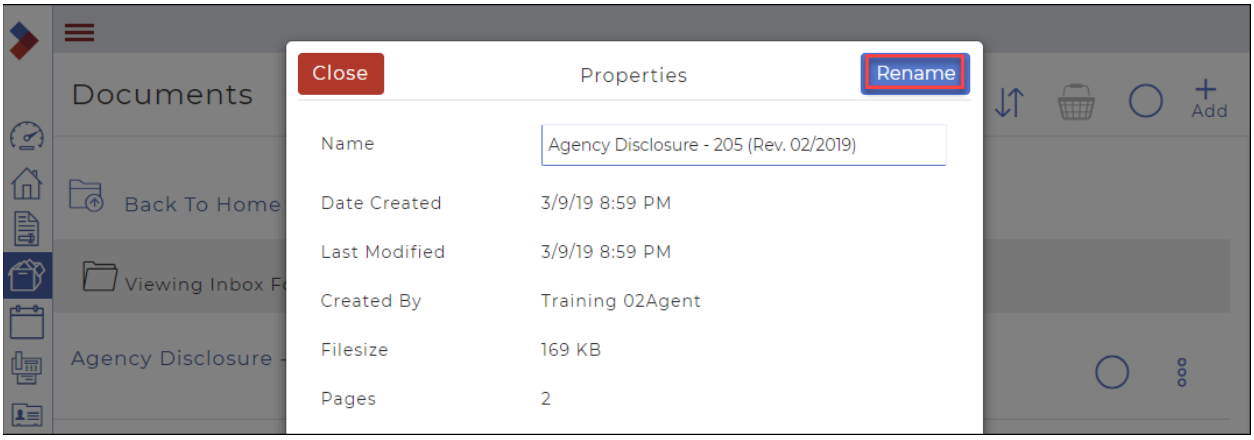
- contained in the Inbox, My, Shared, and Transaction folders in Documents, and
- from a transaction.

To rename a document:

6. In the Sidebar, click **Documents** .
   The **Documents** window displays.
7. Locate the document you want to rename and click the **Ellipses Menu** beside the document.
   The dropdown menu displays several actions.



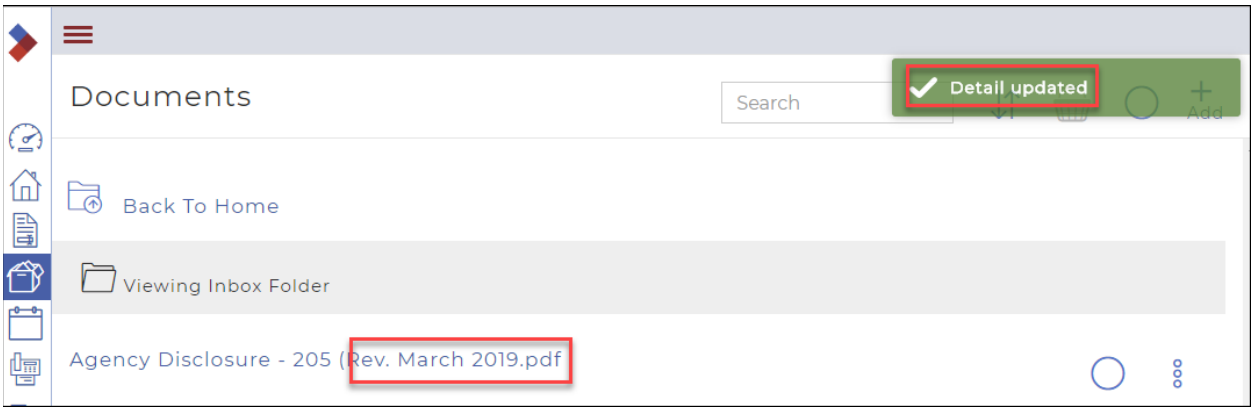
8. Select **Properties/Rename**.
   The **Properties** dialog box displays.



9. Enter a new name for the document in the **Name** field.
10. Click **Rename**.

    A confirmation message briefly displays in the top right, and the document name is updated in the list of documents.

    Note: If your document name is not immediately updated in your web browser, it is recommended that you reload the web page.



Merging and slicing a document

You can use the document merge and slice functionality to split and connect your documents in order to keep your documents orderly and easy to find.

Merging two or more documents

If a salesperson uploaded two separate documents that belong together, you can use the merge functionality to connect them back together.

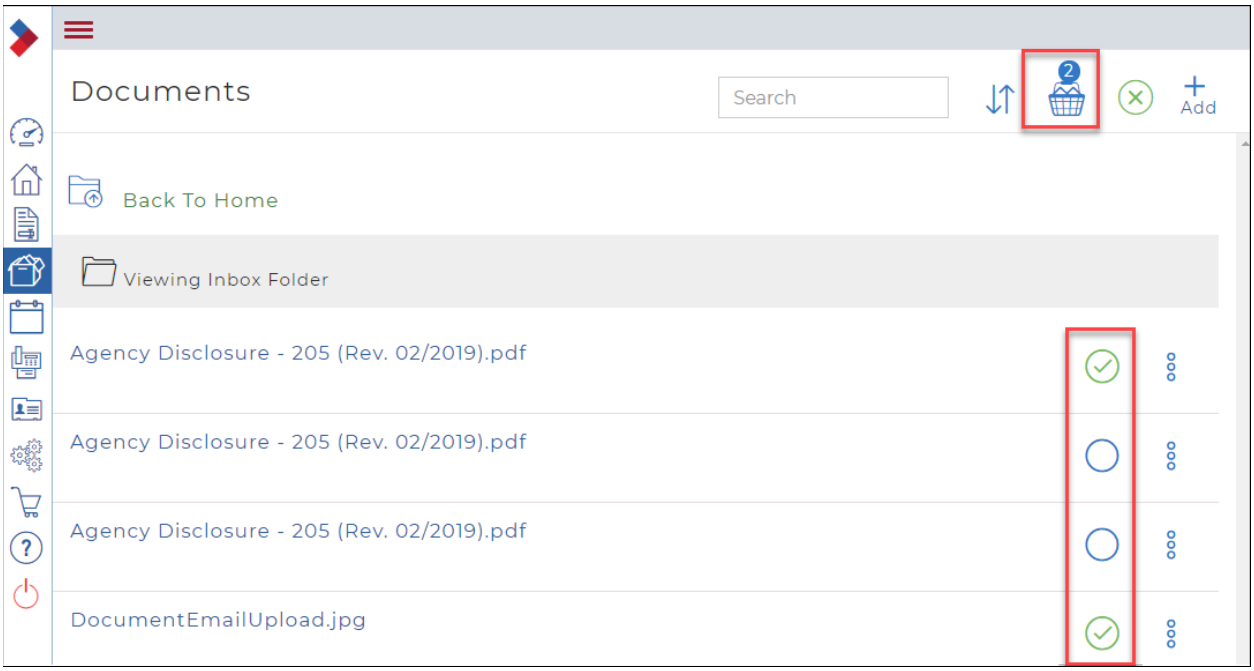
You can merge documents

- contained in the Inbox, My, Shared, and Transaction folders in Documents,
- in a transaction, and
- in different document folders or transactions.

CLICK TO VIEW VIDEO

To merge two or more documents:

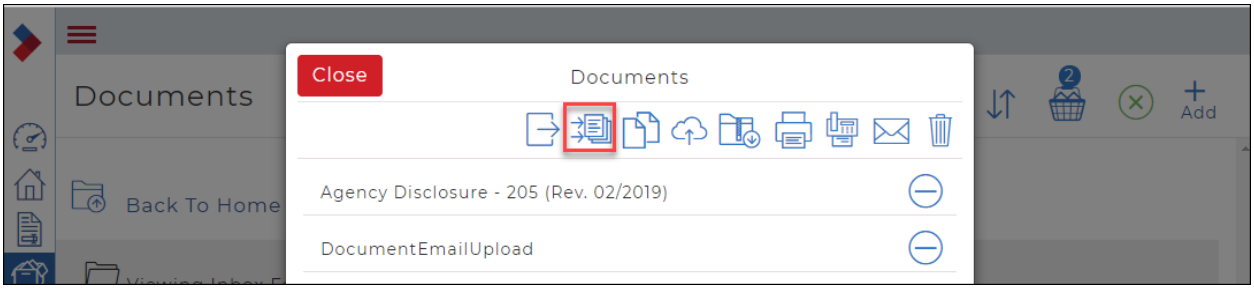
1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Click the selection box for the documents you need to merge.
   The documents are added to your basket.



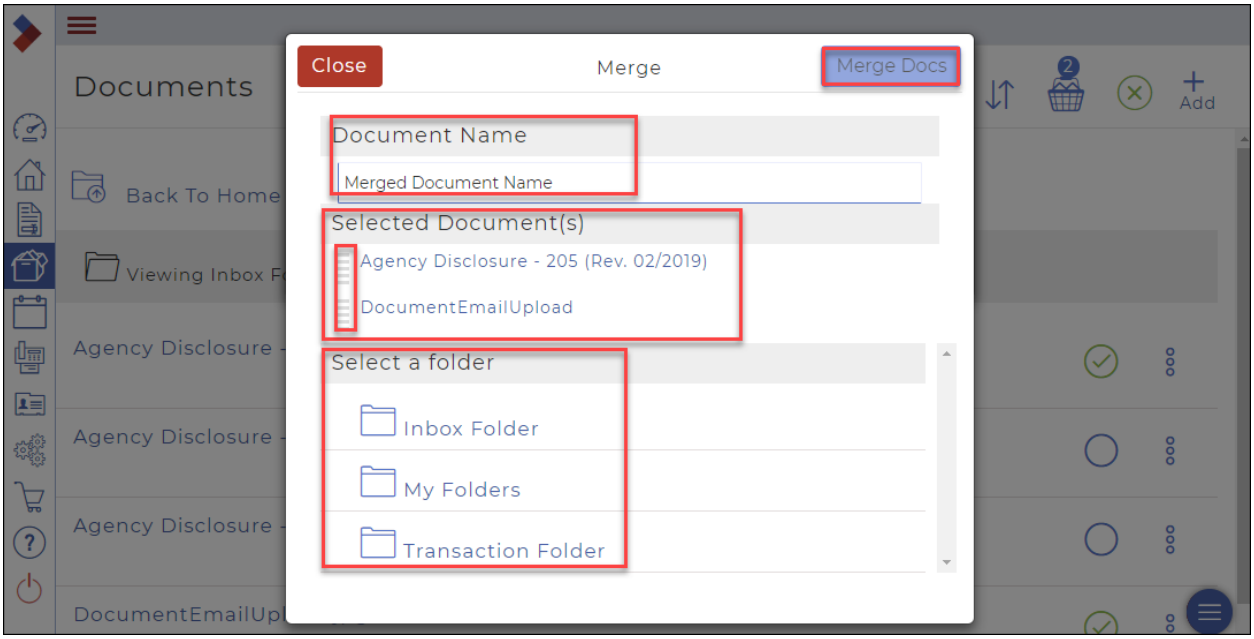
3. Click the **Basket** .

   Note: The number beside the basket indicates how many documents you checked.

   The Documents menu opens.



4. Click **Merge** .
   The **Merge** dialog box displays.



5. Enter a name for the merged document in the **Document Name** field.
6. Optional: Use the **Selected Document(s)** area to drag and drop the documents into the order you need them to display in the merged document. Documents at the top of the list display first in the merged document.
7. Use the **Select a folder** area to select the folder that the merged document is saved to.
8. When you are finished setting up the merged document, click **Merge Docs**.
   The merged document is saved to the specified folder location.

Slicing a document

If a salesperson uploads a group of documents to Documents as a single .pdf file, you can use the slice functionality to split the individual documents out into separate ones.

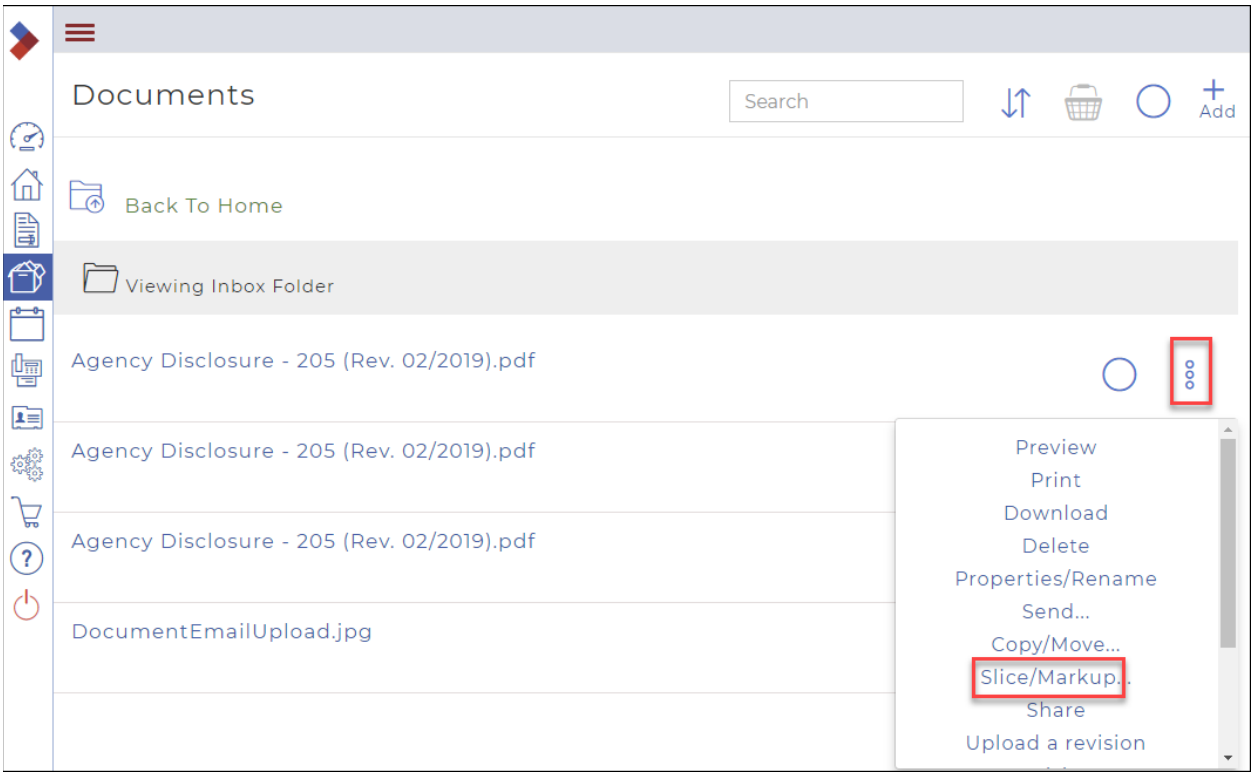
You can slice documents

- contained in the Inbox, My, Shared, and Transaction folders in Documents, and
- in a transaction.

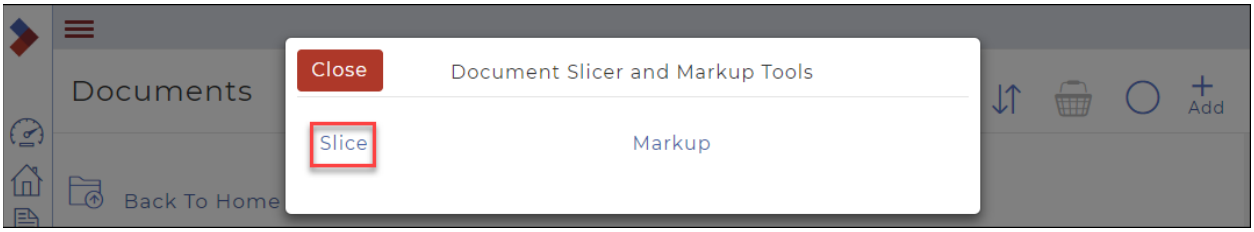
CLICK TO VIEW VIDEO

To slice a document:

1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Locate the document you want to slice and click the **Ellipses Menu** beside the document.
   The dropdown menu displays several actions.

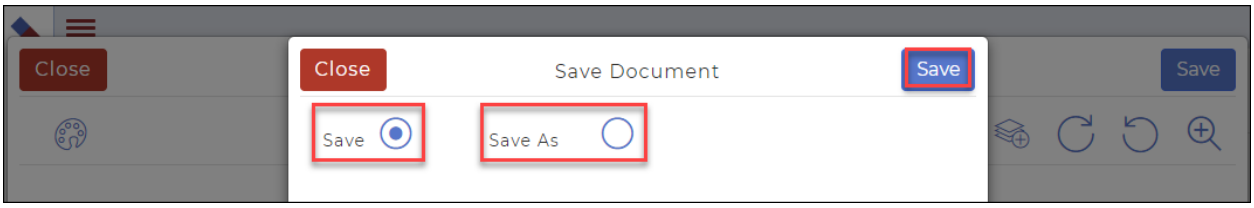


3. Click **Slice/Markup**.
   The Document Slicer and Markup Tools dialog box displays.



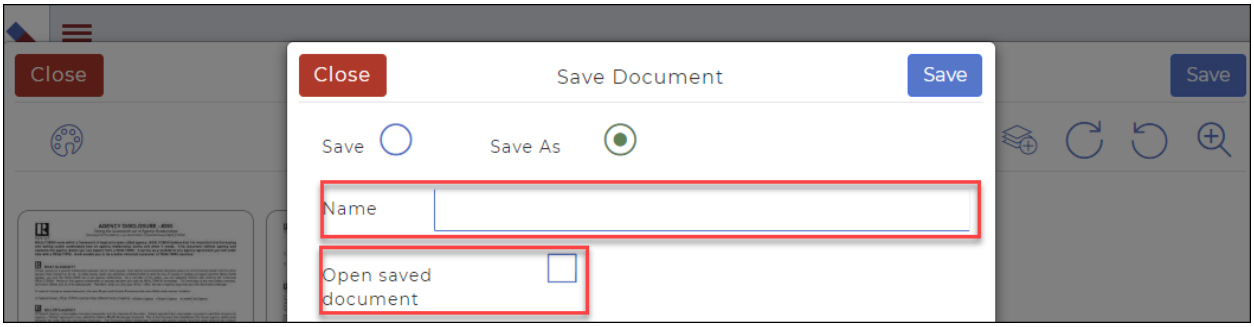
4. Click **Slice**.
   The **Document Slicer** dialog box displays.

5. Click the document pages that you need to make changes to.
    A. Optional: Click the **Remove Pages** icon to remove the selected pages from the document.
    B. Optional: Click the **Deselect** icon if you need to deselect the selected document pages.
    C. Optional: Click the **Select All** icon to select all available document pages.
    D. Optional: Click the **Rotate Right** or **Rotate Left** icons to rotate the selected document pages.
6. When you are finished making changes to the document, click **Save**.
   The **Save Document** dialog box displays.



7. Do one of the following:
    - Click **Save** to save the sliced document over the current version of the document.
    - Click **Save As** to save the sliced document as a new version of the document.

    *Note: If you click **Save As**, the **Name** field and **Open saved document** checkbox display.*



8. Click **Replace Document** to save the document as a new version and use it to replace a checklist document on a transaction. Use the available Document dropdown to select the checklist item to replace.

    Note: This option is only available when slicing a document attached to a transaction that has an associated checklist.

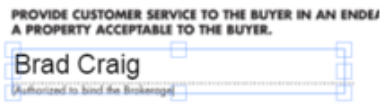
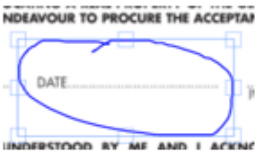
9. Do one of the following:
    - Check **All pages** to save all pages of the document.
    - Check **Selected pages** to save only the pages you selected in Step 5.
    - If applicable: Type a name for the sliced document in the **Name** field.
    - If applicable: Check **Open saved document** if you need to view the sliced document after you save it.
10. When you are finished setting up your saved document, click **Save**.

    The sliced document is saved to the same folder you accessed it from.

Marking up a document

CLICK TO VIEW VIDEO

Use the markup tools to add or remove text or indicate important parts of a document without having to print out the document, mark it up, and then re-scan and upload it. The system has several markup tools available:

Tool	Description	When to Use
Text	Adds a text box to the document 	When you need to add or update the text in a document, such as prepopulating a name or date field.
Freedraw	Draw freely on the document 	When you need to indicate an irregularly shaped area of a document that requires attention, or cross out an irregularly shaped section of the document
Ellipse	Draw a circular shaded area on the document	When you need to indicate a round area of a document that requires attention
Rectangle	Draw a rectangular shaded area on the document	When you need to indicate a rectangular area of a document that requires attention, such as a signature area
Highlight	Draw a rectangular shaded area on the document	When you need to indicate existing document text that requires attention
Line	Draw a straight line on the document	When you need to draw attention to a particular area of a document, such as an important clause, or cross out a single line of text
Redact	Redact an area on the document	When you need to hide an area of a document, such as a paragraph that no longer applies due to a recent legislation change

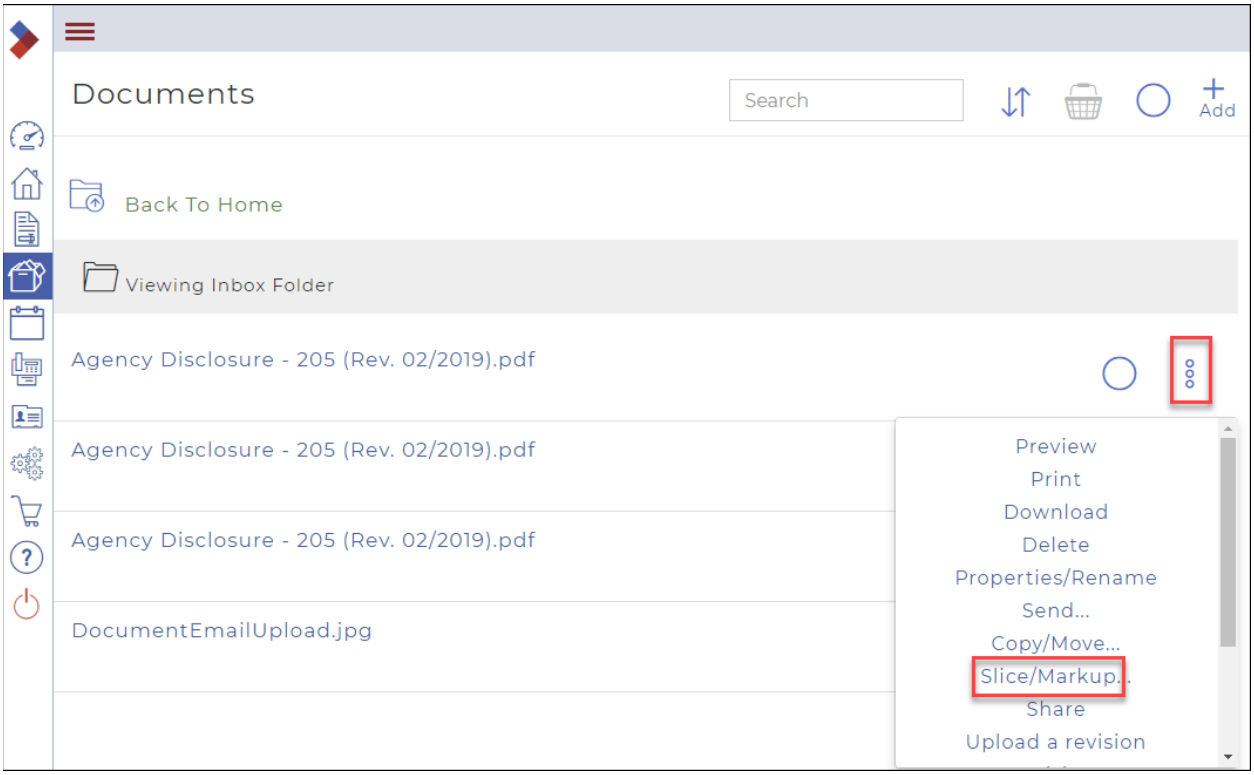
Note: To use markup tools, click the icon once, then go to the place in the form, click and hold and drag. Right-click provides format options, left-click activates the box.

You can markup documents

- contained in the Inbox, My, Shared, and Transaction folders in Documents, and
- in a transaction.

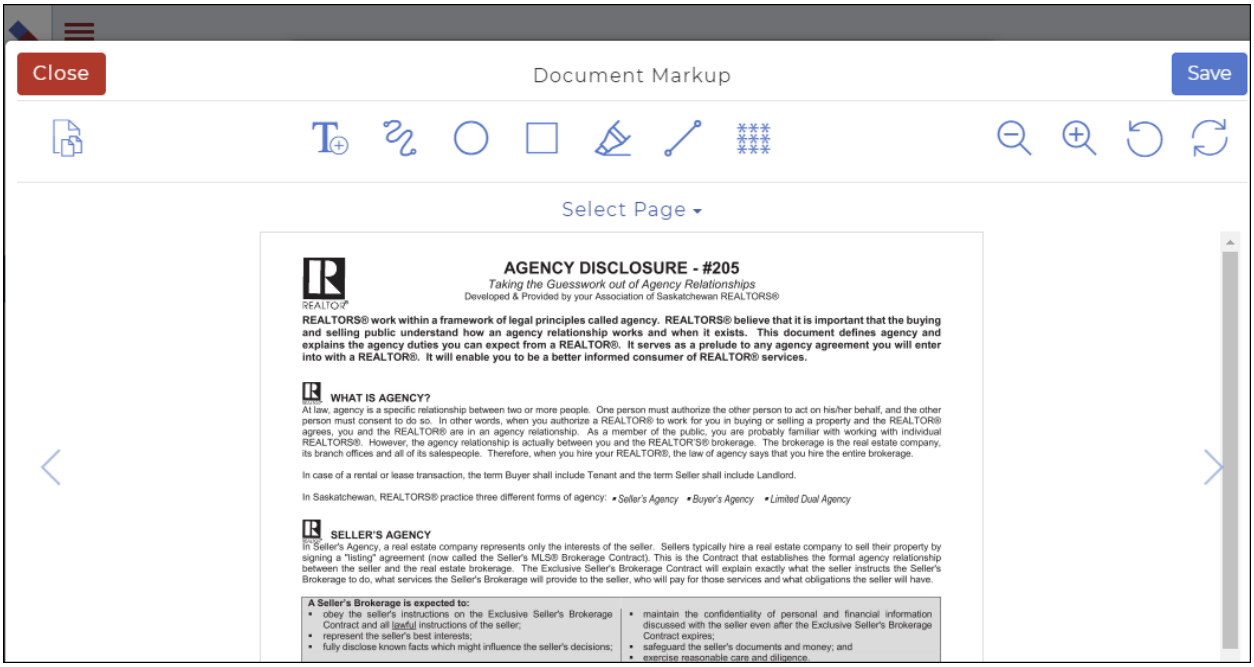
To markup a document:

1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Locate the document you want to markup and click the **Ellipses Menu** beside the document.
   The dropdown menu displays several actions.



3. Click **Slice/Markup**.
   The **Document Slicer and Markup Tools** dialog box displays.

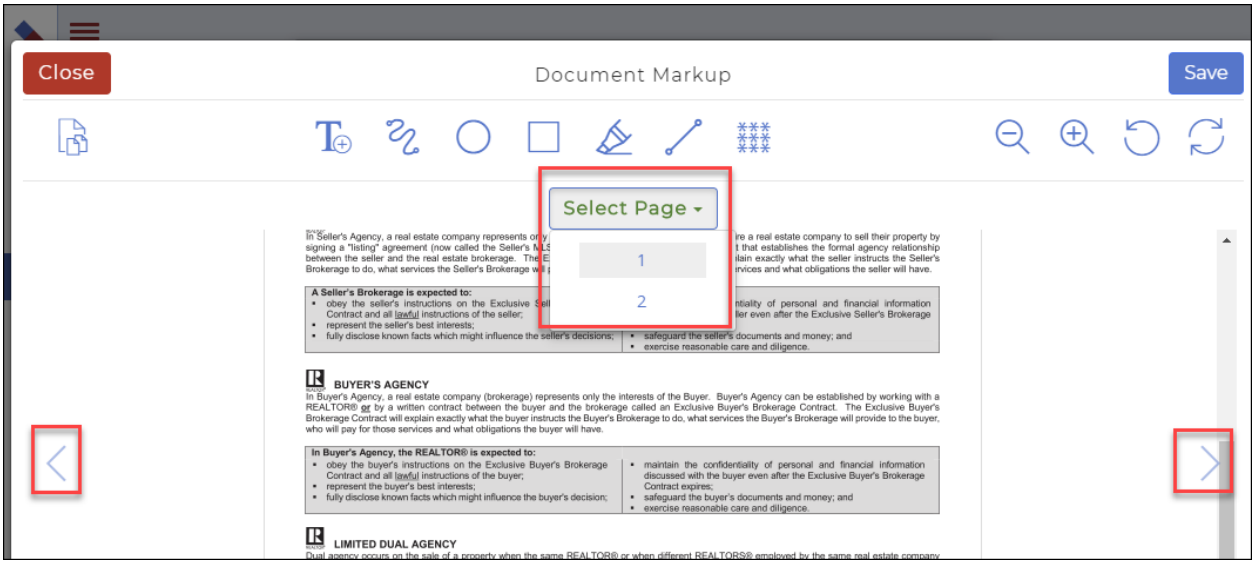
4. Click **Markup**.
   The Document Markup page displays.



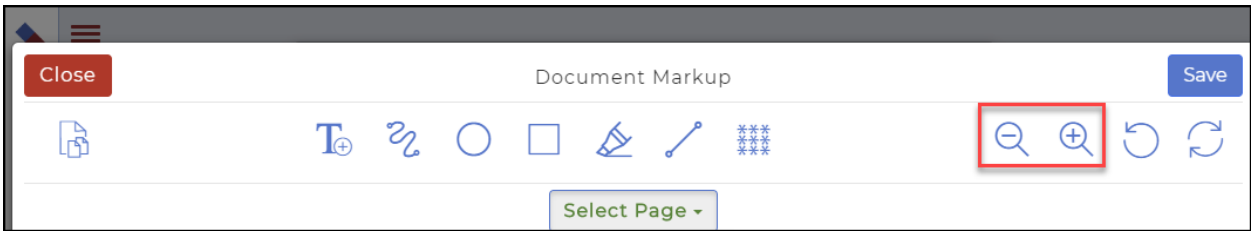
5. Use the available tools to make any necessary markups on the document pages.
6. Optional: Right-click a markup you create to access additional options for each markup. The available options are as follows:

Tool	Available Right Click Options
Text	• Background color • Font • Font size • Font color • Bold • Italic
Freedraw	• Line width (size) • Line color
Ellipse	• Ellipse color • Ellipse opacity
Rectangle	• Rectangle color • Rectangle opacity
Highlight	• Highlight color • Highlight opacity
Line	• Line width (size) • Line color
Redact	• None

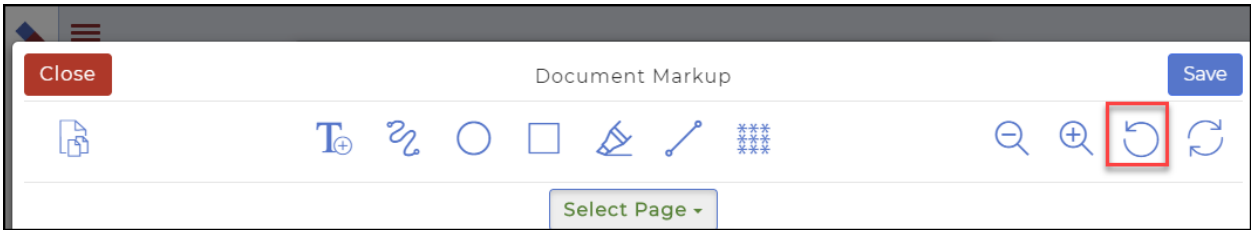
7. To navigate the document's individual pages, do one of the following:
   - Use the dropdown to select the page you need to mark up.
   - Use the page selection arrows to move to the next or previous pages in the document.



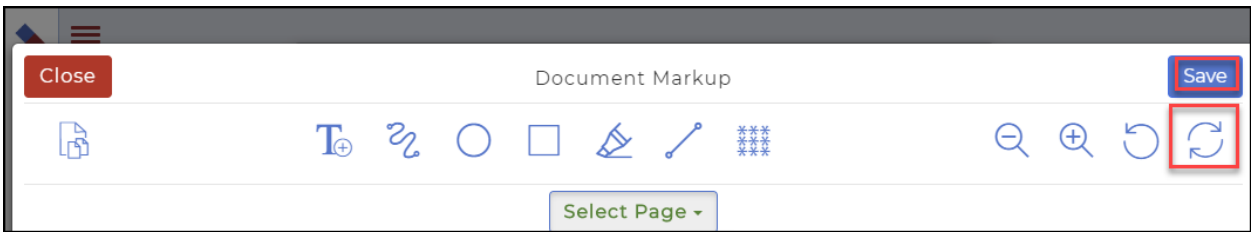
8. Click **Zoom In** or **Zoom Out** to increase or reduce the document magnification.



9. Click **Undo All** to undo all markups on the document.

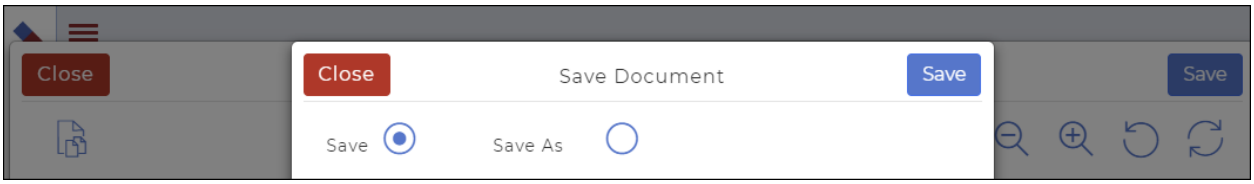


10. Click **Undo Last** to undo only the last markup on the document.

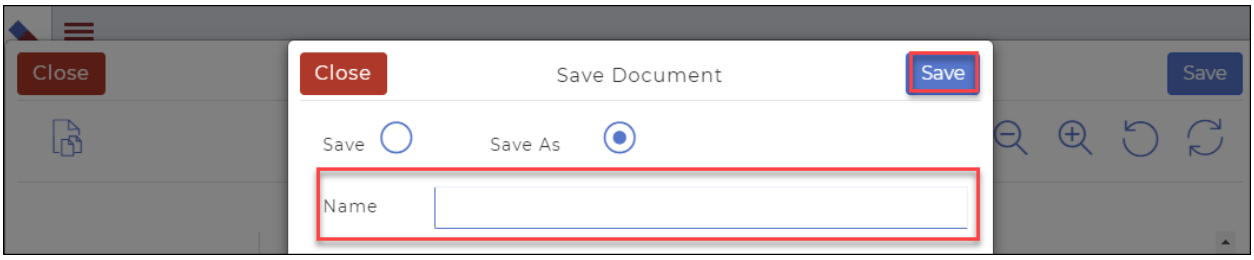


11. When you are finished marking up the document, click **Save**.
    The **Save Document** dialog box opens.

12. Do one of the following:
    - Click the **Save** circle to save the document with all markups.



13. Click the **Save As** circle to save the document with all markups as a new document. An additional field displays. Enter the name of the new document in the **Name** field.



14. Click **Save**.
    The document is saved in the folder you originally accessed it from.

Printing a document

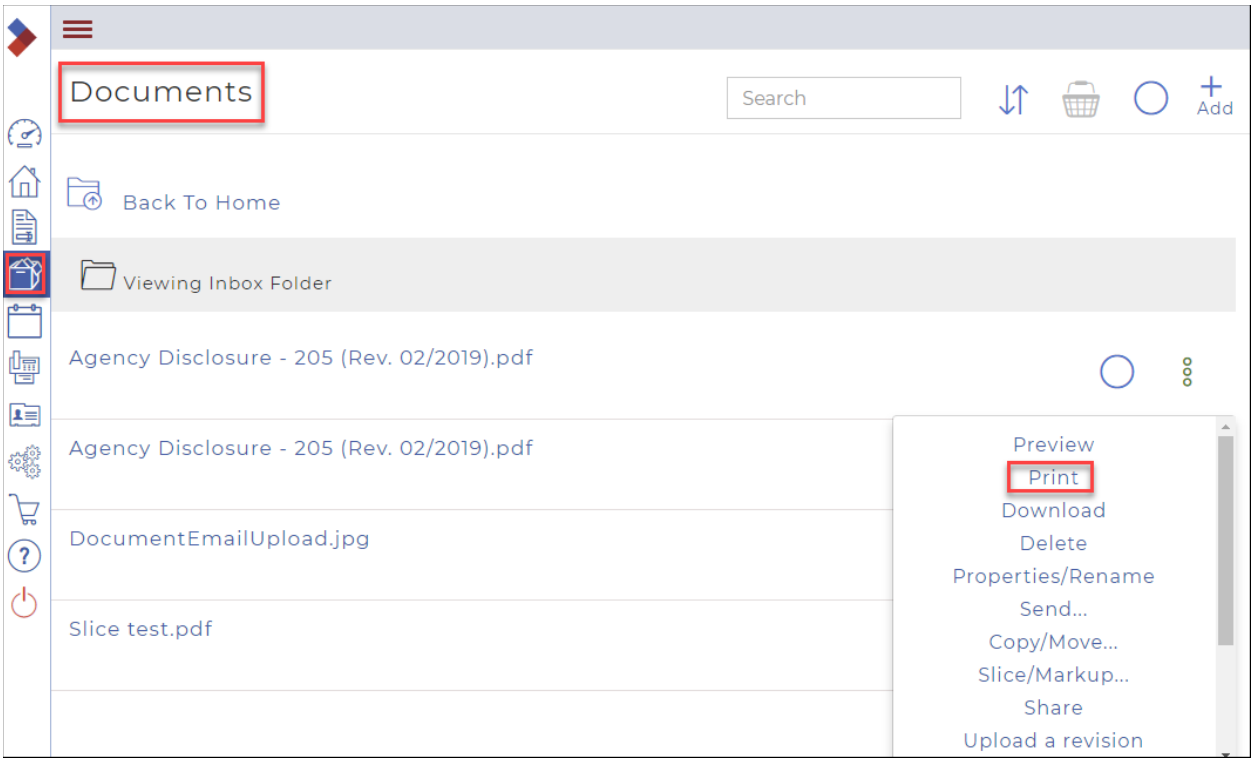
You can print documents you have uploaded to the system. Use this functionality when you need to work with a hard copy of a document. For example: If you receive an agreement of purchase and sale from a third party, such as an outside broker and need to sign and return the document to them, you can print out the document, sign it, and then return it to the outside broker.

You can print documents

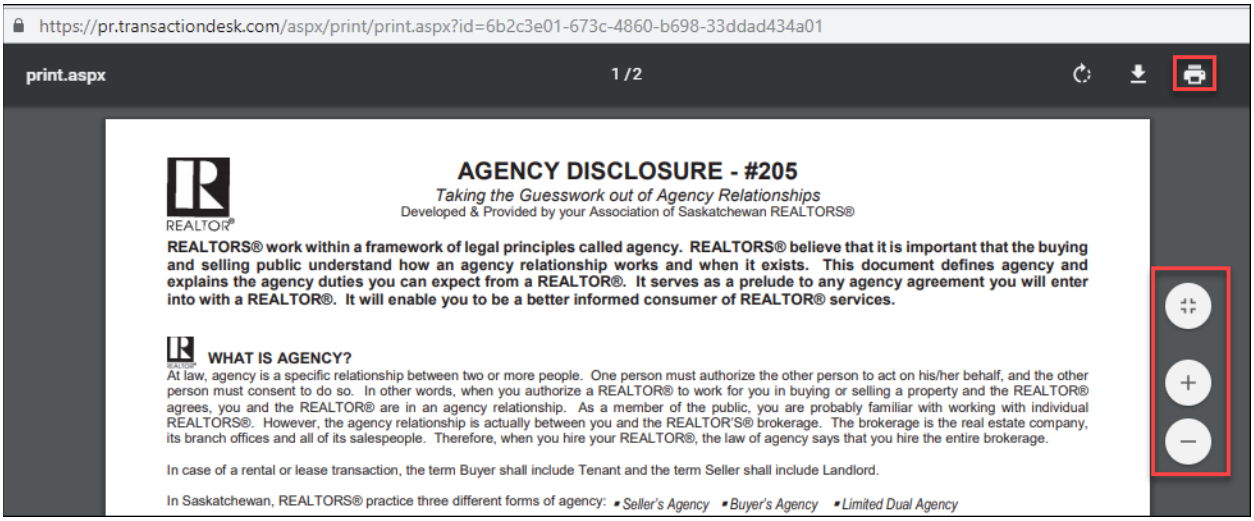
- contained in the Inbox, My, Shared, and Transaction folders in Documents, and
- from a transaction.

To print a document:

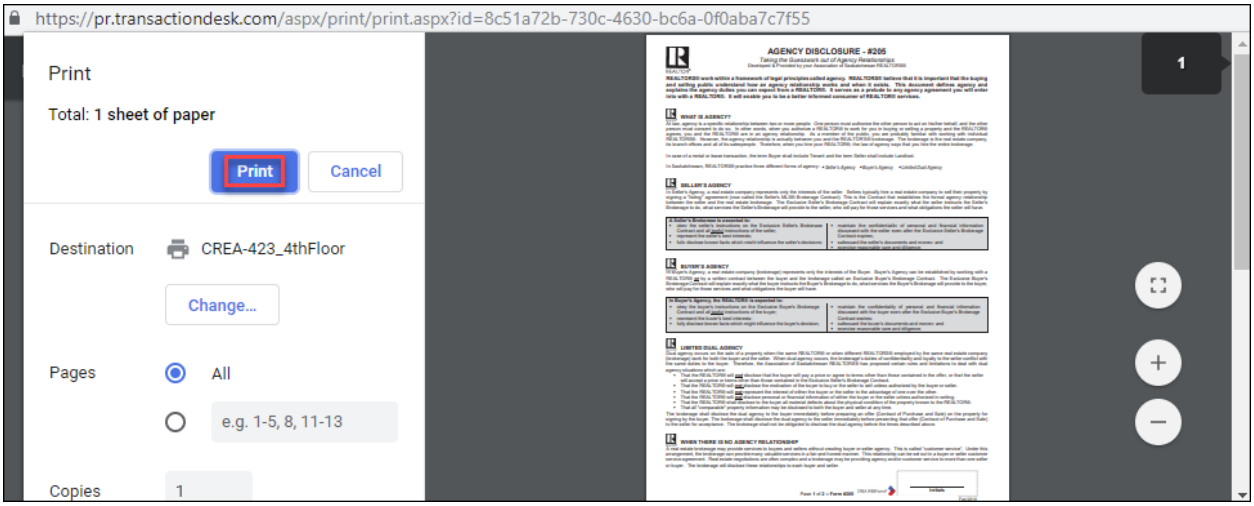
1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Locate the document you want to print and click the **Ellipses Menu** beside the document.
   The dropdown menu displays several actions.



3. Select **Print**.
   A separate print window displays.



4. Optional: Use the available options, such as **Zoom**, to review the document.
5. When you are ready to print the document, click **Print**.
   The printer settings window opens.



6. Optional: Use the available print settings to customize the appearance of your printout.
7. When you are ready to print, click **Print**.
   The document is printed.

Deleting a document

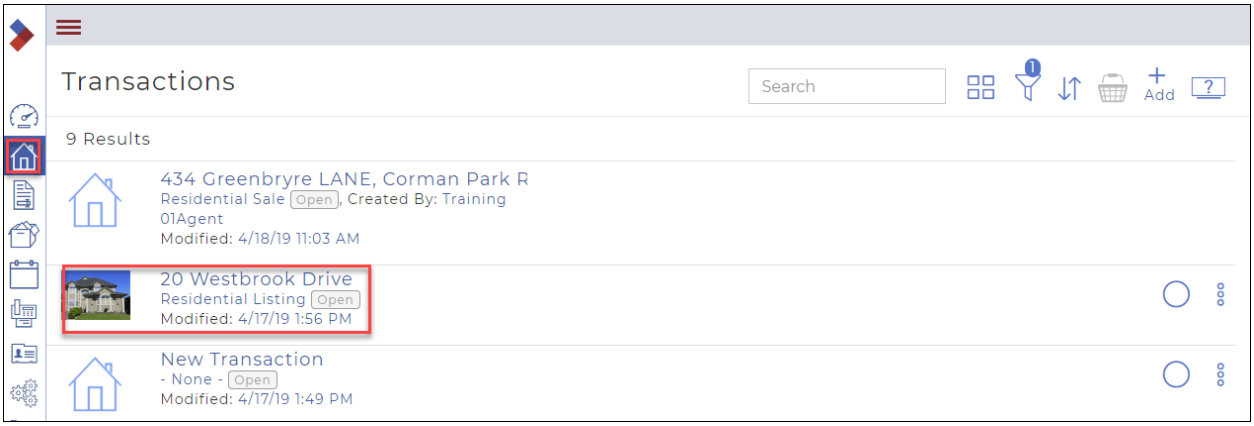
You can delete any unneeded documents in the system. For example, if you uploaded the wrong document to a transaction, you can delete it, ensuring that only the documents that belong with the transaction are attached to it.

You can delete documents

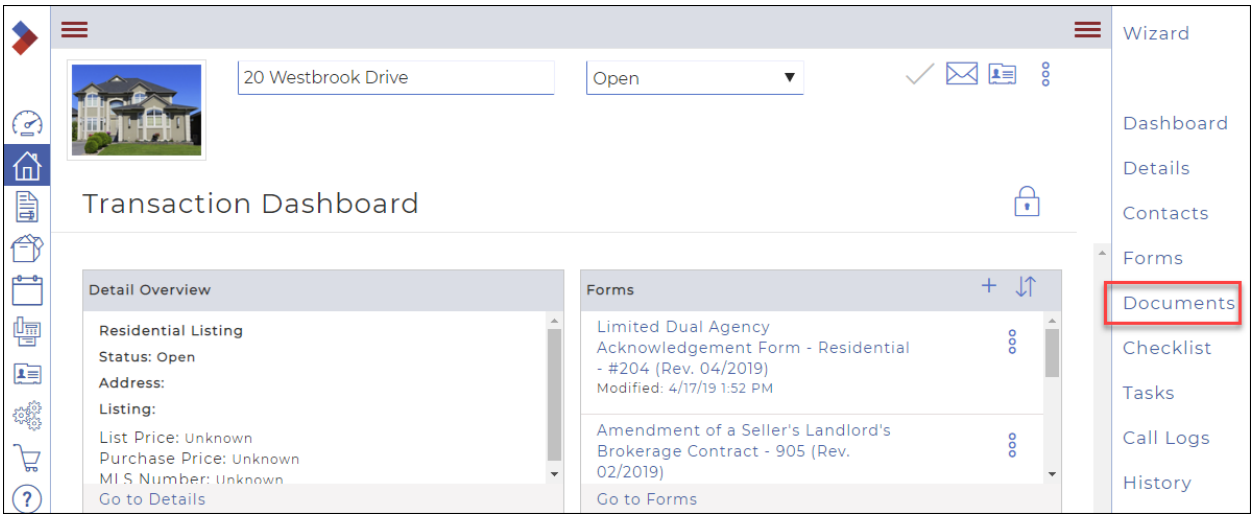
- in a transaction, and
- contained in the Inbox, My, Shared, and Transaction folders in Documents.

To delete a document from a transaction:

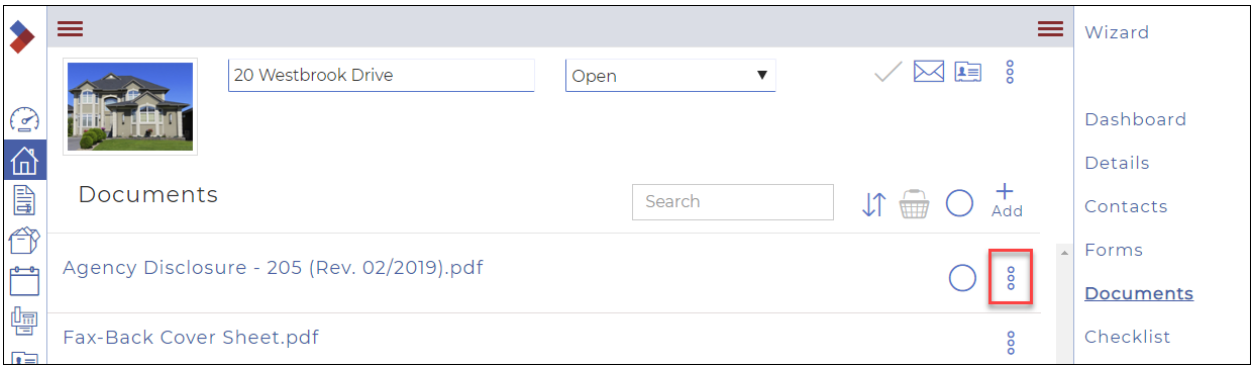
8. Click **Transaction** in the Sidebar.
   Your **Transactions** display.



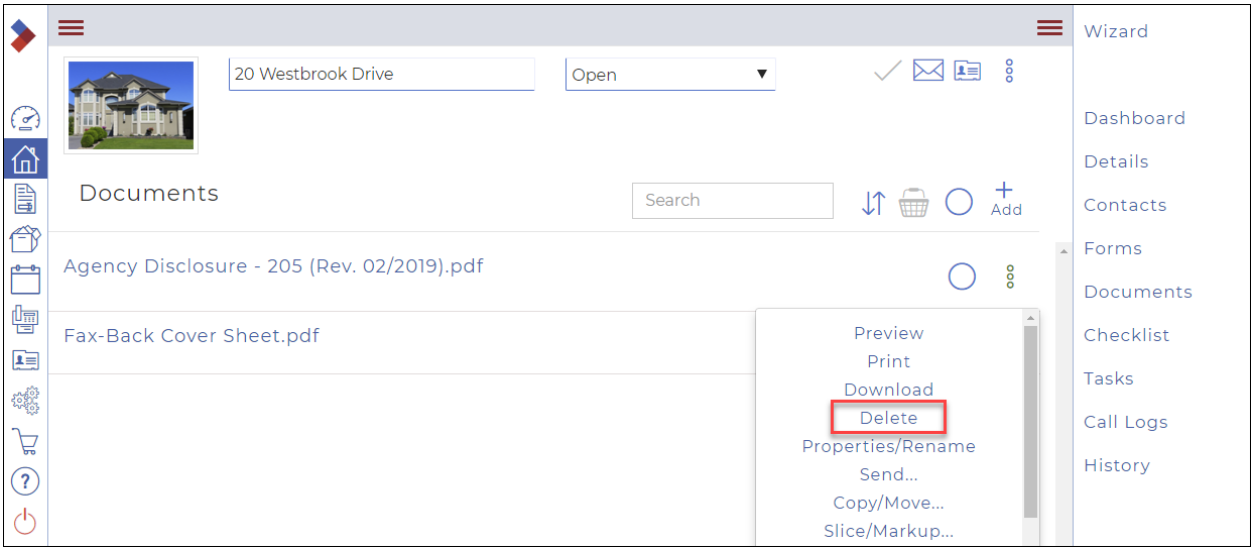
9. Click the name of the transaction from which you want to delete a document.
   The **Transaction Dashboard** displays.



10. In the right sidebar, click **Documents**.
    The list of documents displays.

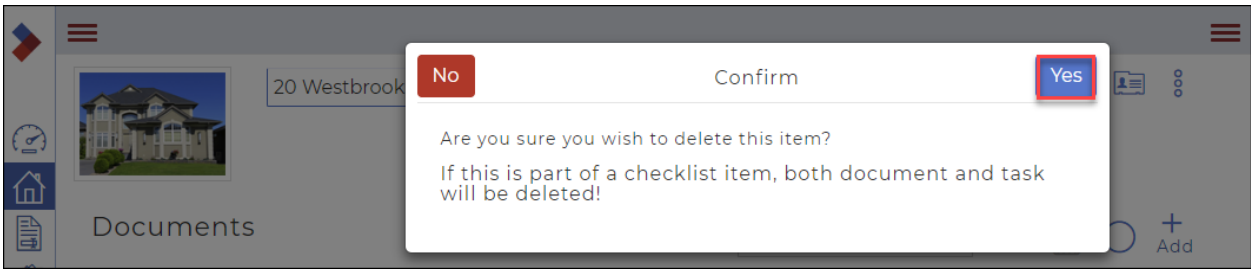


11. Click the **Ellipses Menu** beside the document you want to delete to display a dropdown menu of available actions.



12. Click **Delete**.

A confirmation dialog box displays, asking you to confirm the deletion.



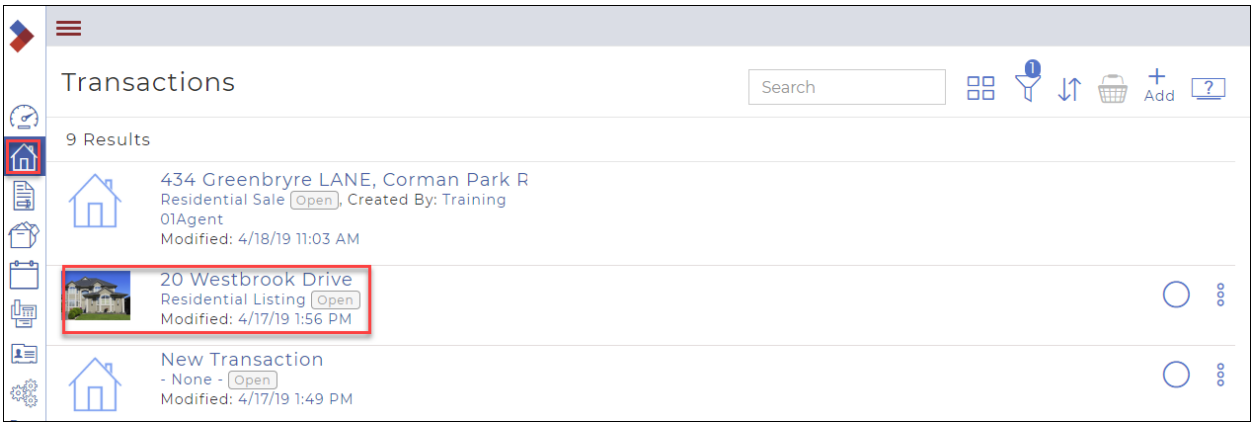
13. Click **Yes**.

You have now deleted a document from a transaction.

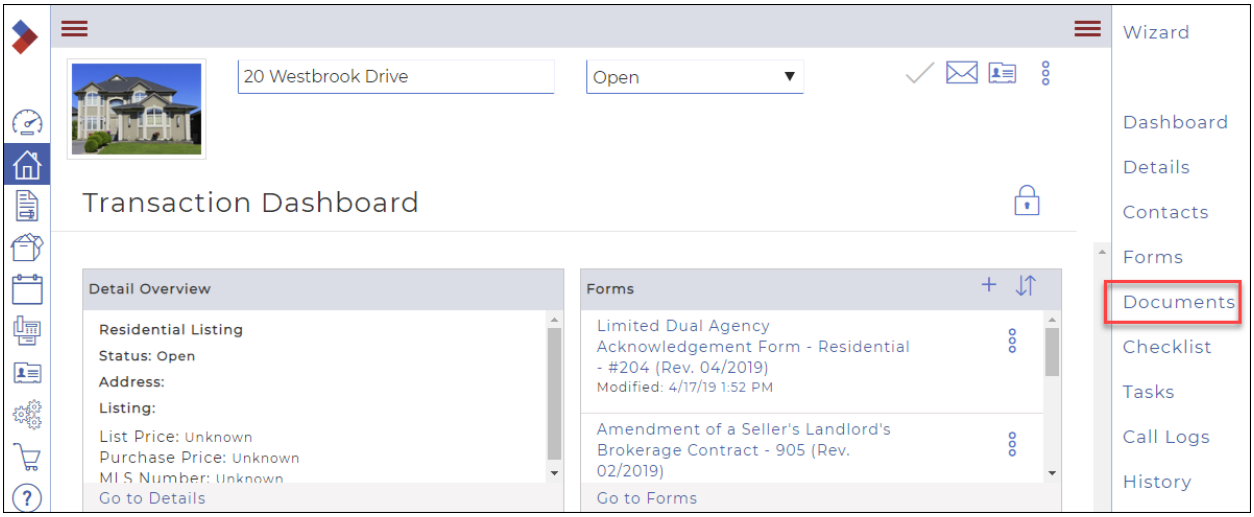
CLICK TO VIEW VIDEO

To delete multiple documents from a transaction:

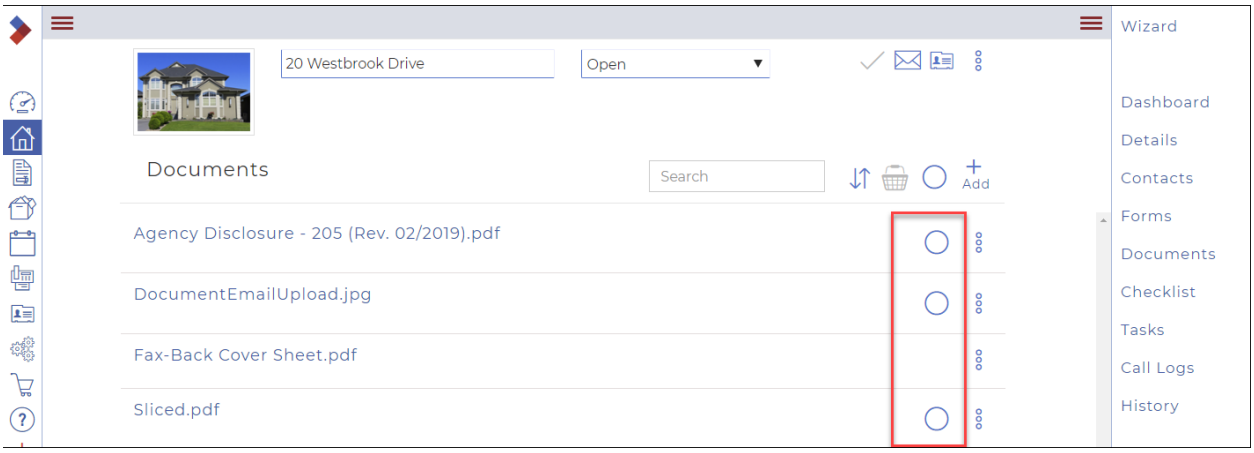
1. Click **Transactions** in the Sidebar.
   Your **Transactions** display.



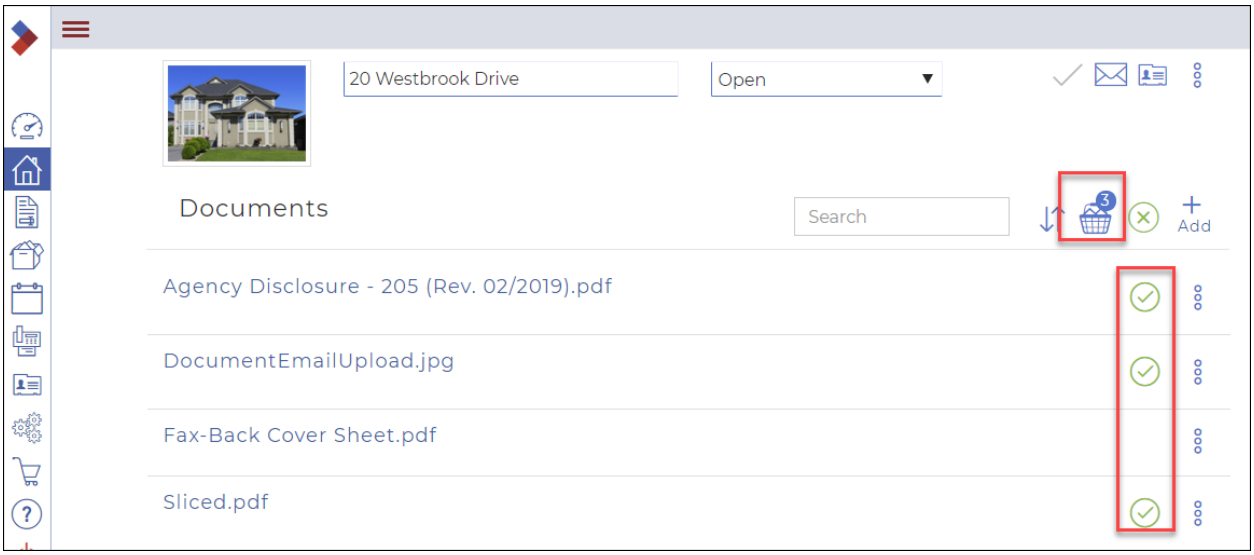
2. Click the name of the transaction from which you want to delete a document.
   The **Transaction Dashboard** displays.



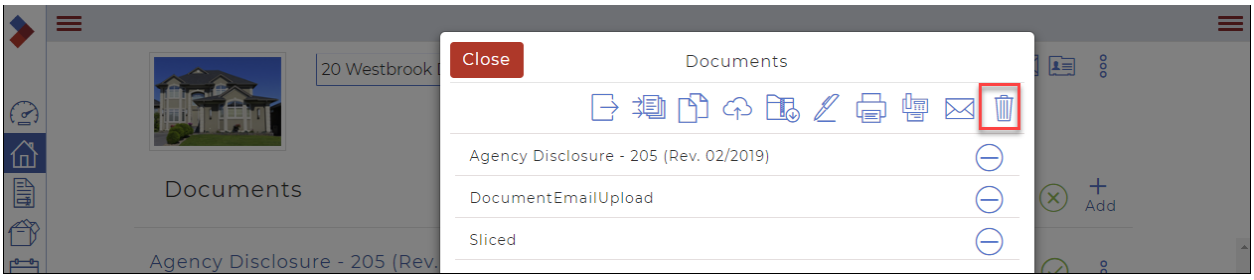
3. In the right sidebar, click **Documents**.
   The list of documents displays.



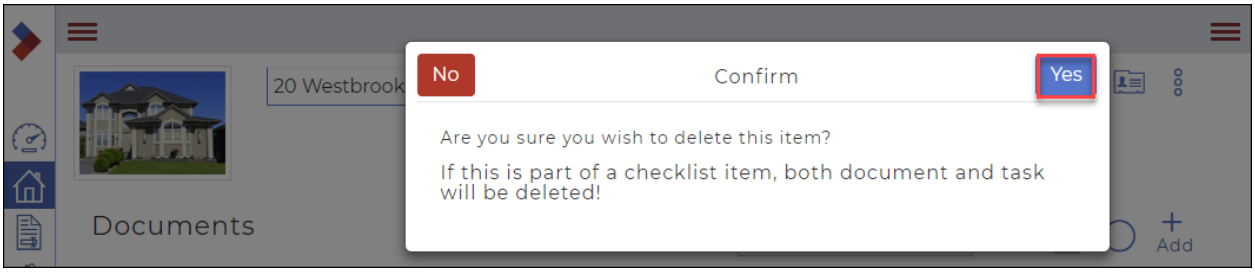
4. Click the circle beside the documents you want to delete. The documents will be added to your basket.



5. Click the **Basket** .
   A **Documents** dialog box displays.



6. Click **Delete** .
   A **Confirm** dialog box displays, asking you to confirm the deletion.



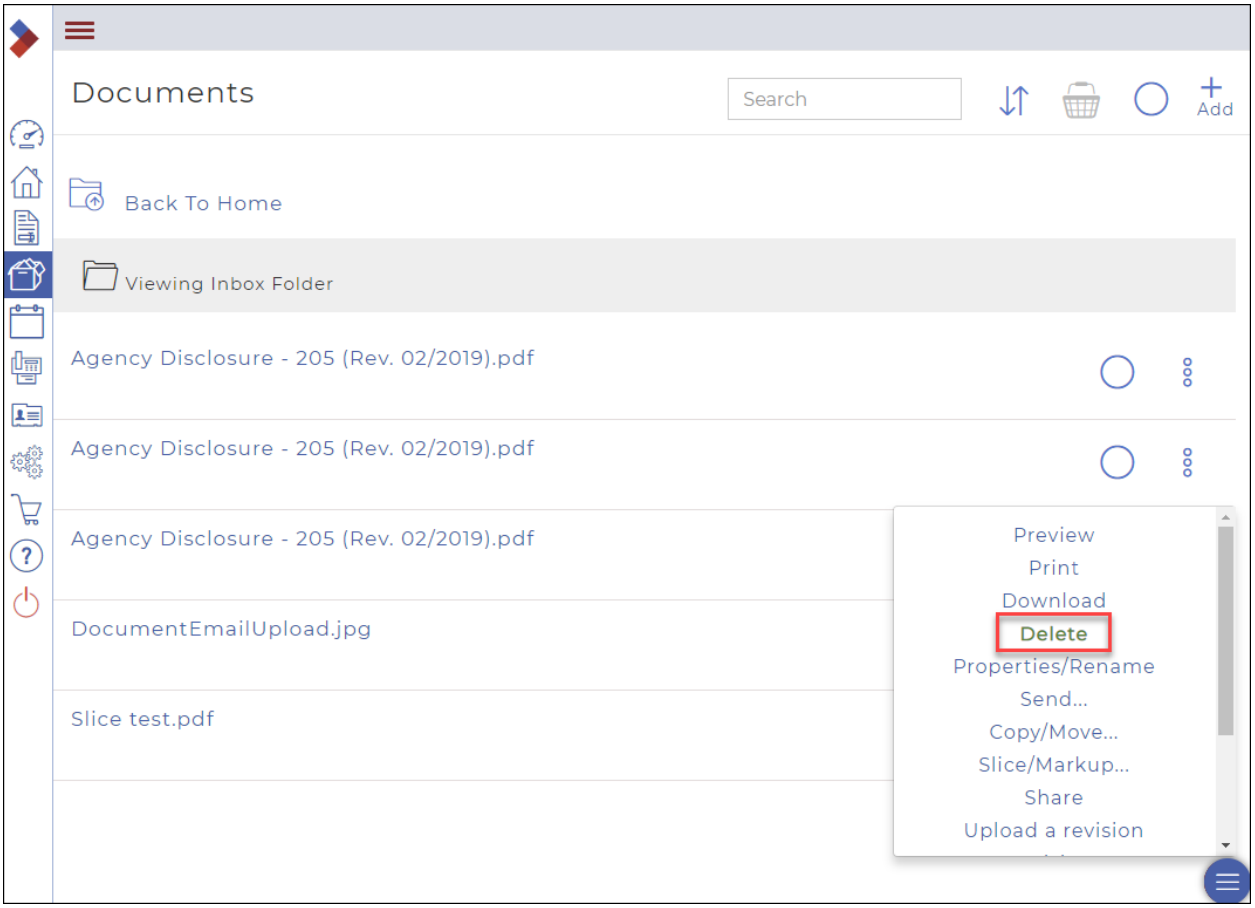
7. Click **Yes**.

You have now deleted multiple documents from a transaction.

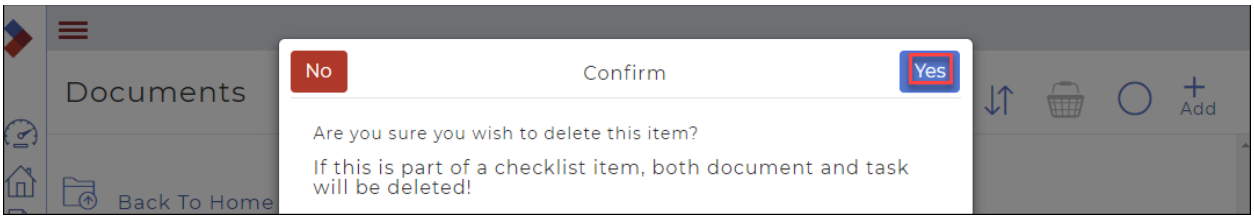
CLICK TO VIEW VIDEO

To delete a document from a documents folder:

1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Locate the document you want to download and click the **Ellipses Menu** beside the document.
   The dropdown menu displays several actions.



3. Select **Delete**.
   The **Confirm** dialog box displays.



4. Click **Yes**.

   The document is deleted from the list of documents.

   Note: If your document is part of a checklist item, both the document and the task are deleted.

Emailing a single document

You can use the system to email a document to a specific recipient from within the application. This functionality is convenient because it means that you do not have to download the document from the system, and then attach it to an email in your email client, and then send it to the recipient.

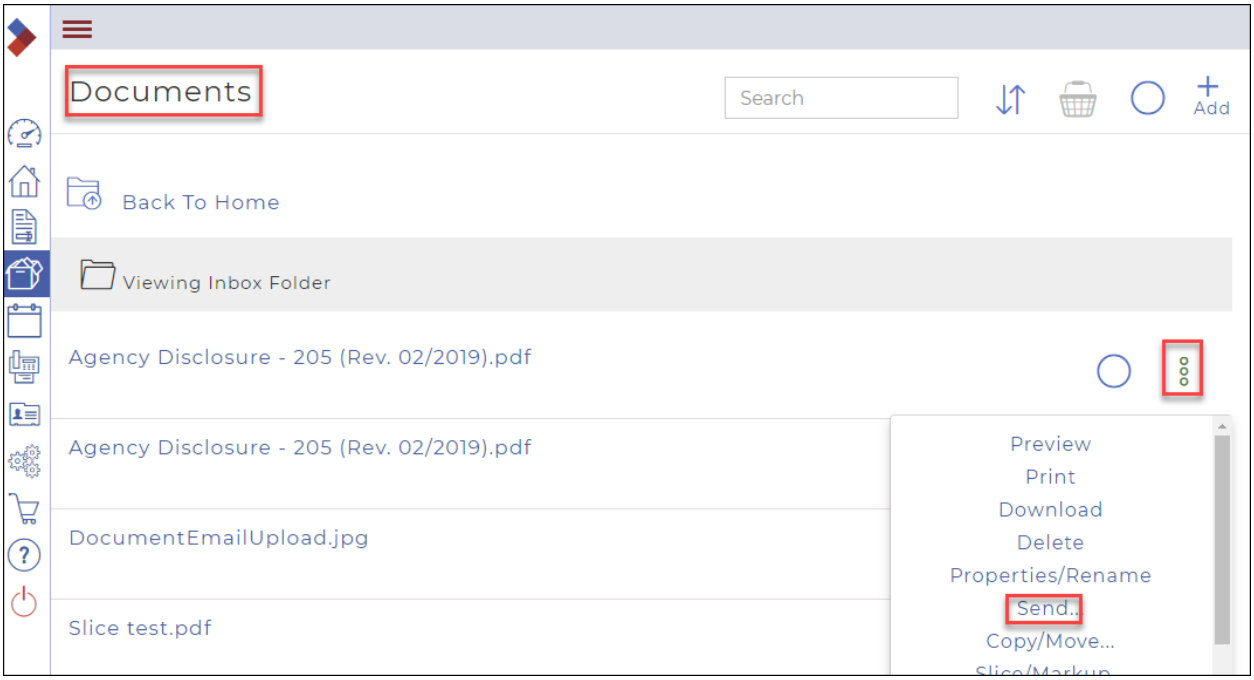
You can email documents

- contained in the Inbox, My, Shared, and Transaction folders in Documents, and
- from a transaction.

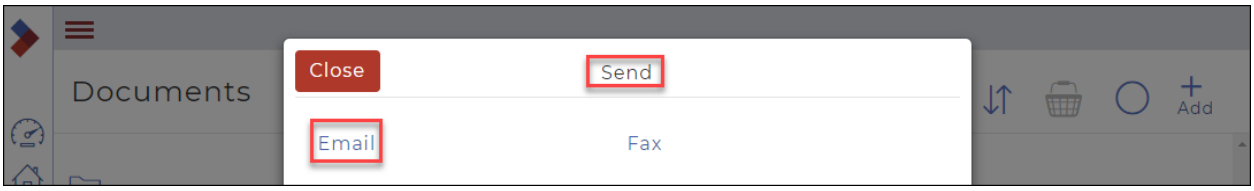
CLICK TO VIEW VIDEO

To email a single document:

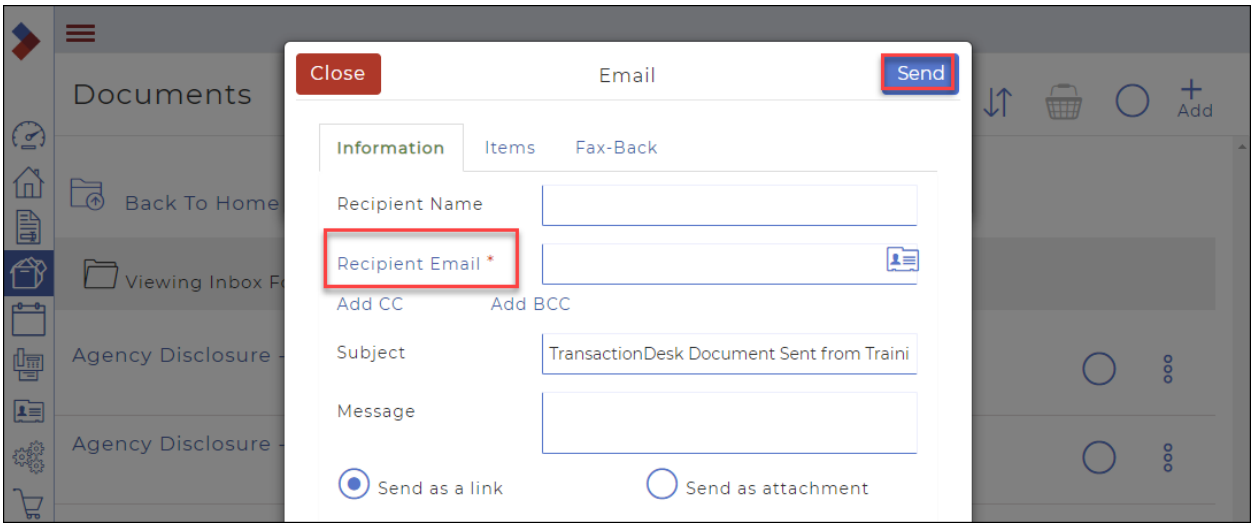
1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Locate the document you want to email and click the **Ellipses Menu** beside the document.
   The dropdown menu displays several actions.



3. Click **Send**.
   The **Send** dialog box displays.

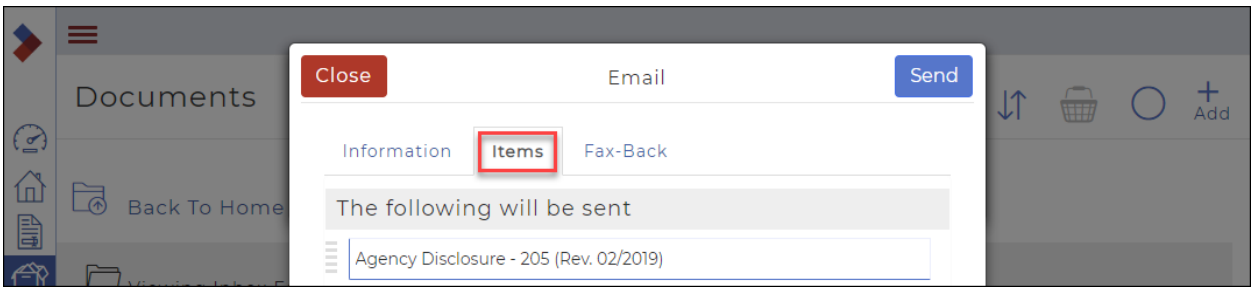


4. Click **Email**.
   The **Email** dialog box displays.

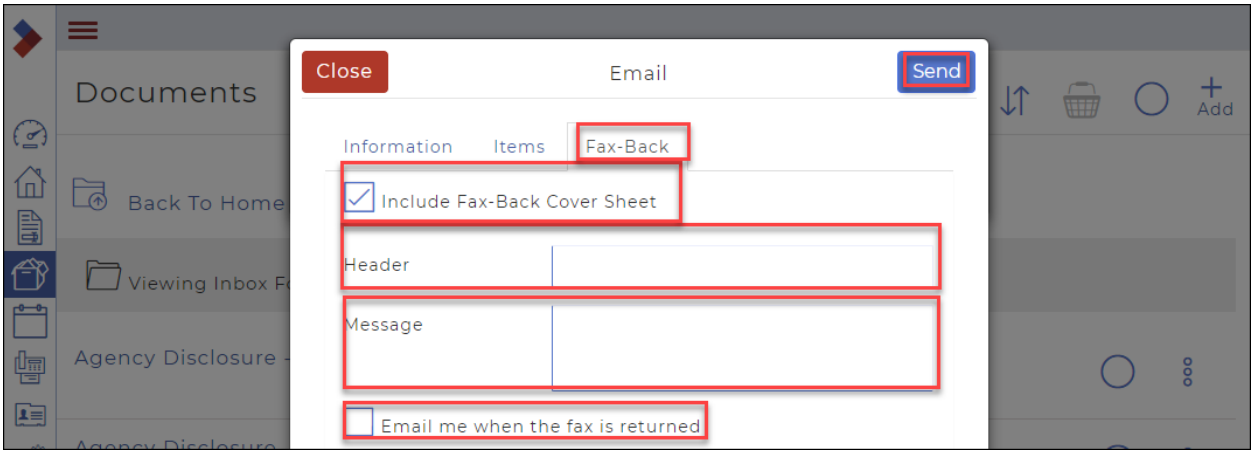


Note: Required fields are indicated by an asterisk.*

5. Use the **Information** tab fields to add information.
   - Optional: **Recipient Name**
   - Required fields: **Recipient Email**
   - Optional: Click **Add CC** to add a CC recipient to the email.
   - Optional: Click **Add BCC** to add a BCC recipient to the email.
   - Optional: **Subject**
   - Optional: **Message**
6. Do one of the following:
   - Click **Send as a link** to include a hyperlink to the document in the body of the email.
   - Click **Send as attachment** to include the document as an email attachment.
7. If you have additional email attachments, use the **Items** tab to arrange the order of the links or email attachments by dragging and dropping the documents.



8. If you need to include a fax back cover sheet with your email, navigate to the **Fax-Back** tab and check **Include Fax-Back Cover Sheet** to display more options.
    - Enter a fax header and body message in the **Header** and **Message** fields.
    - If you require a notification when the fax is completed, check Email me when the fax is returned.



9. When you are finished setting up your email, click **Send**.

   The email is sent to the intended recipient.

Emailing multiple documents

You can use the system to email documents to a specific recipient from within the application. This functionality is convenient because it means that you do not have to download the documents from the system, and then attach them to an email in your email client, and then send it to the recipient.

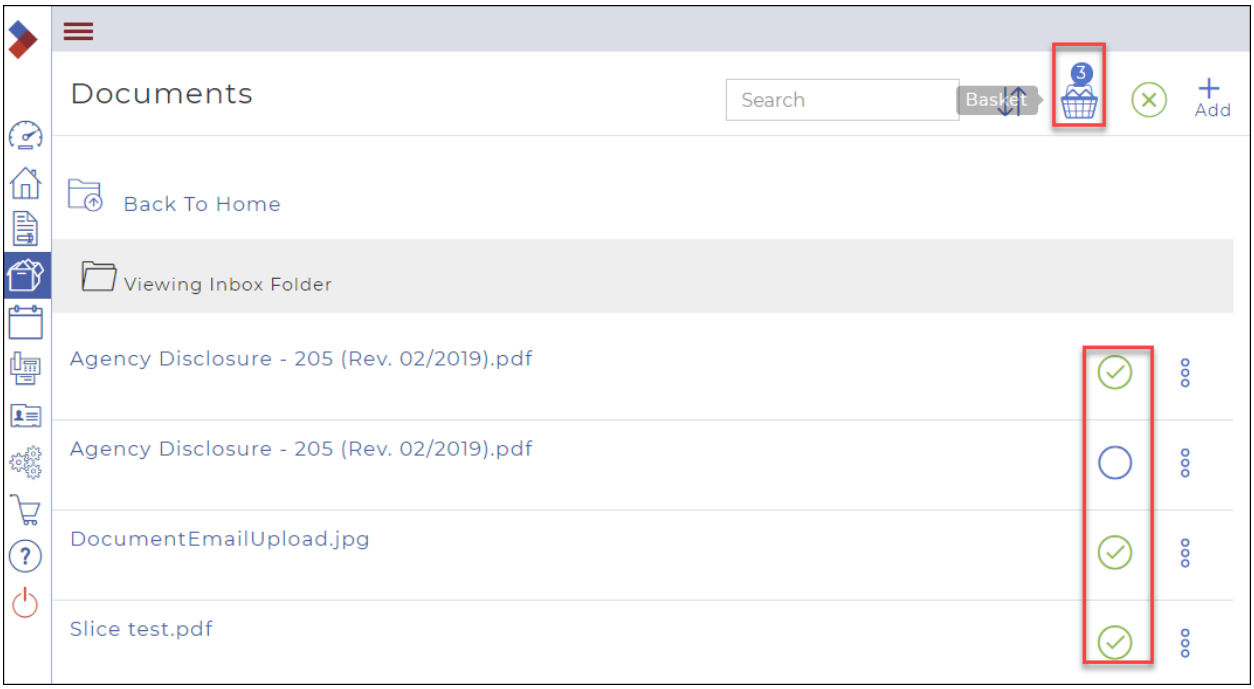
You can email documents

- contained in the Inbox, My, Shared, and Transaction folders in Documents, and
- from a transaction.

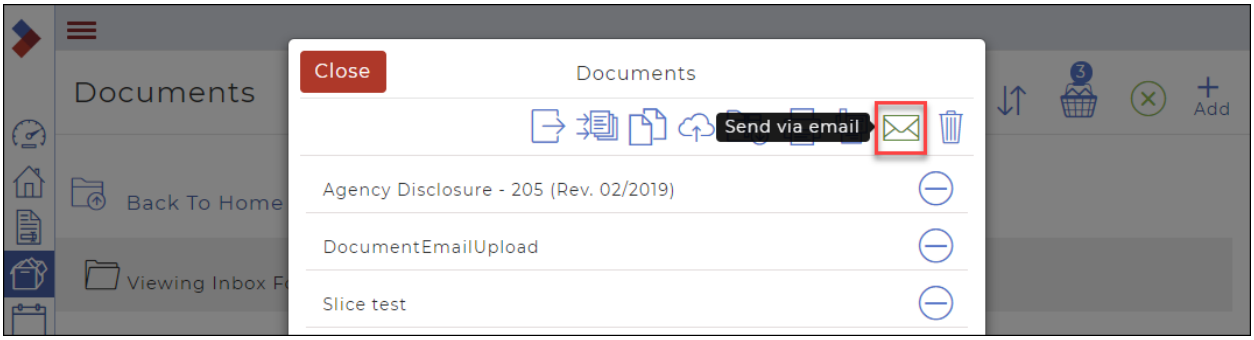
CLICK TO VIEW VIDEO

To email multiple documents:

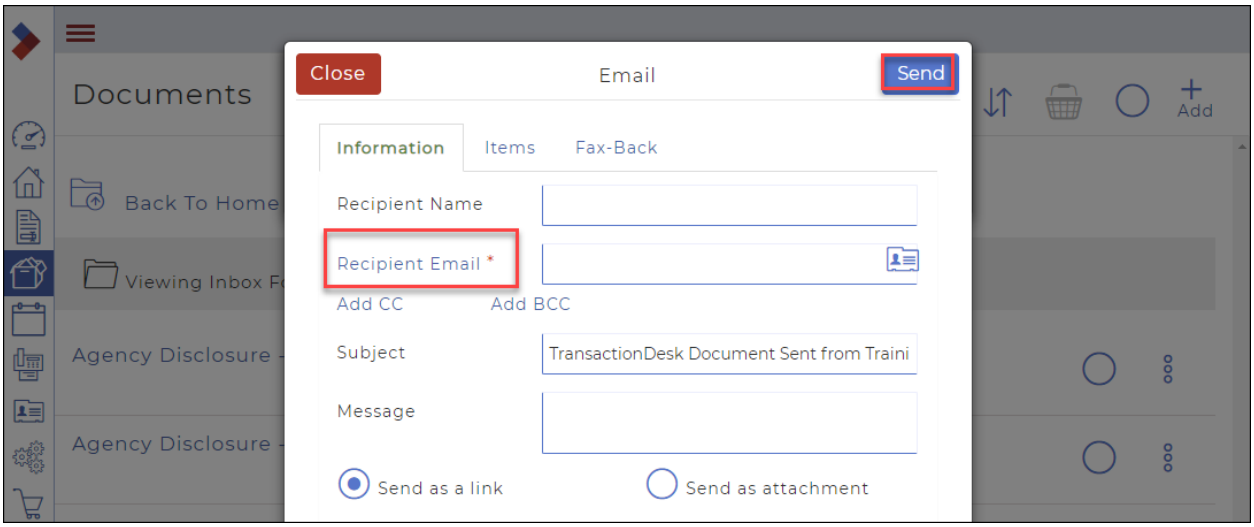
1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Select the documents you want to email by clicking in the Select circle .
   The documents are added to the basket, and the number of documents is indicated above the basket.



3. Click the **Basket** .
   The **Documents** dialog box displays.

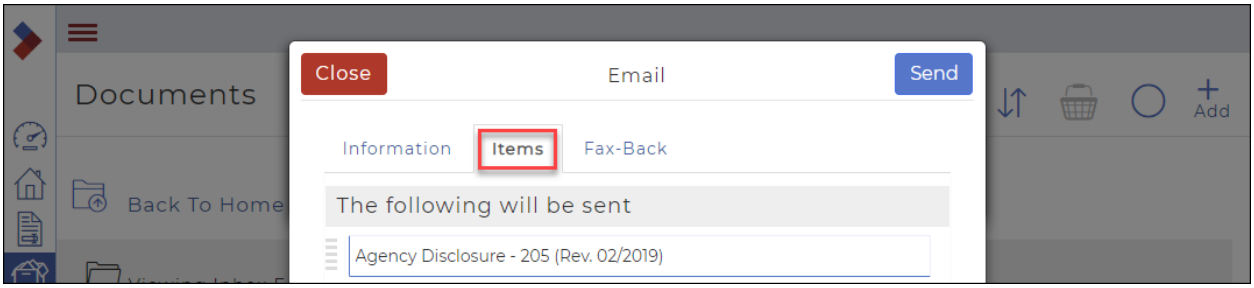


4. Click **Send via email** .
   The **Email** dialog box displays.

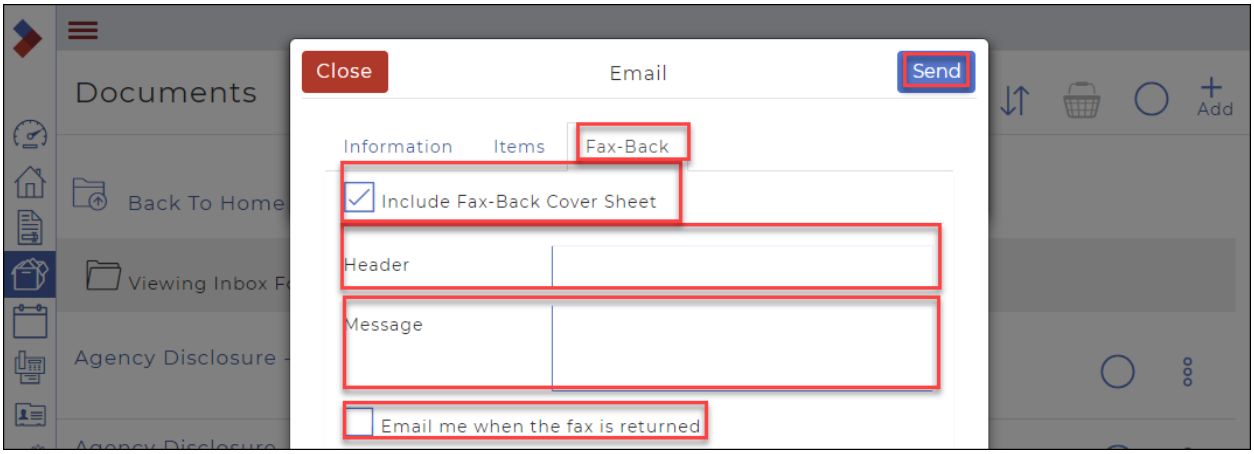


Note: Required fields are indicated by an asterisk.*

5. Use the **Information** tab fields to add information.
   - Optional: **Recipient Name**
   - Required fields: **Recipient Email**
   - Optional: Click **Add CC** to add a CC recipient to the email.
   - Optional: Click **Add BCC** to add a BCC recipient to the email.
   - Optional: **Subject**
   - Optional: **Message**
6. Do one of the following:
   - Click **Send as a link** to include a hyperlink to the document in the body of the email.
   - Click **Send as attachment** to include the document as an email attachment.
7. If you have additional email attachments, use the **Items** tab to arrange the order of the links or email attachments by dragging and dropping the documents.



8. If you need to include a fax back cover sheet with your email, navigate to the **Fax-Back** tab and check **Include Fax-Back Cover Sheet** to display more options.
   - Enter a fax header and body message in the **Header** and **Message** fields.
   - If you require a notification when the fax is completed, check Email me when the fax is returned.



9. When you are finished setting up your email, click **Send**.

   The email is sent to the intended recipient.

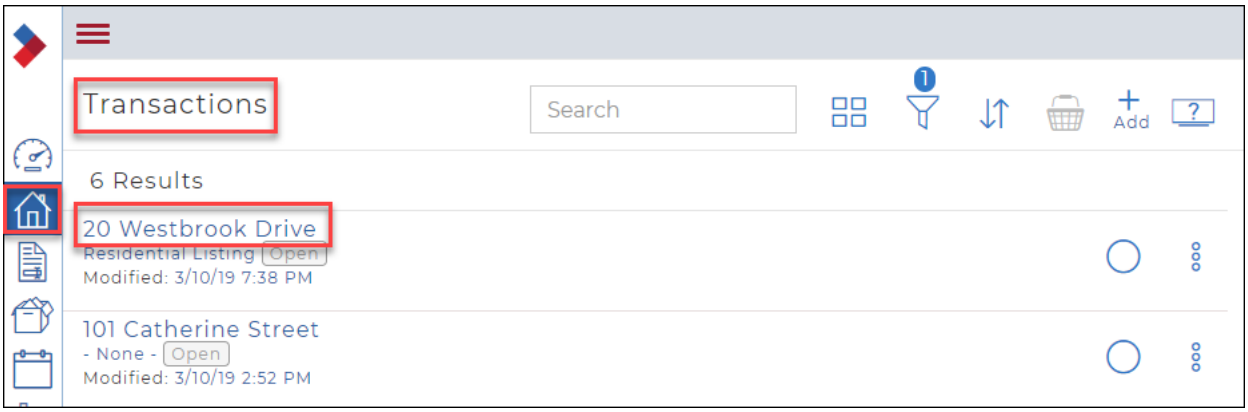
Emailing a document from a transaction

You can send a document or form that is attached to a transaction via email.

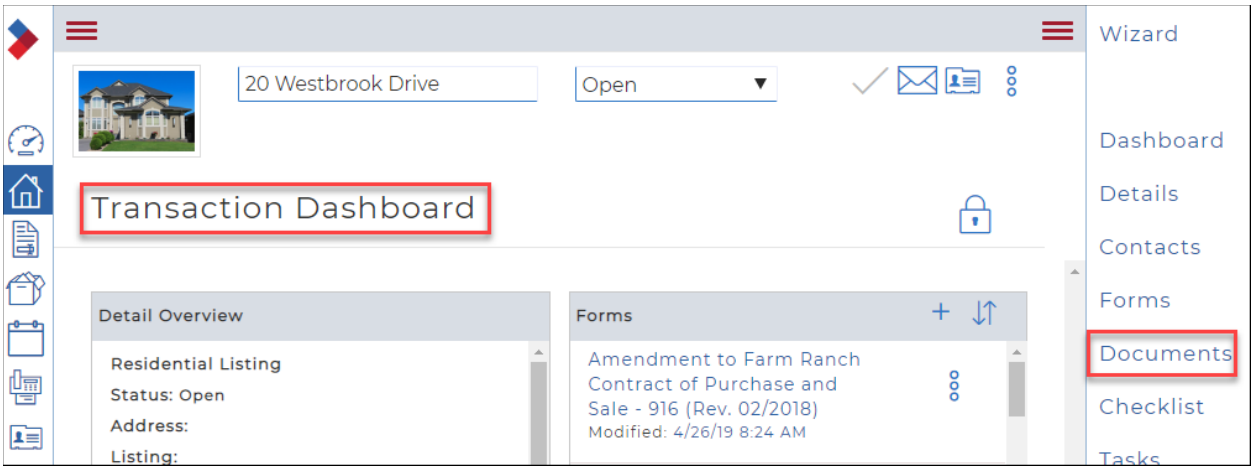
CLICK TO VIEW VIDEO

To email a document from a transaction:

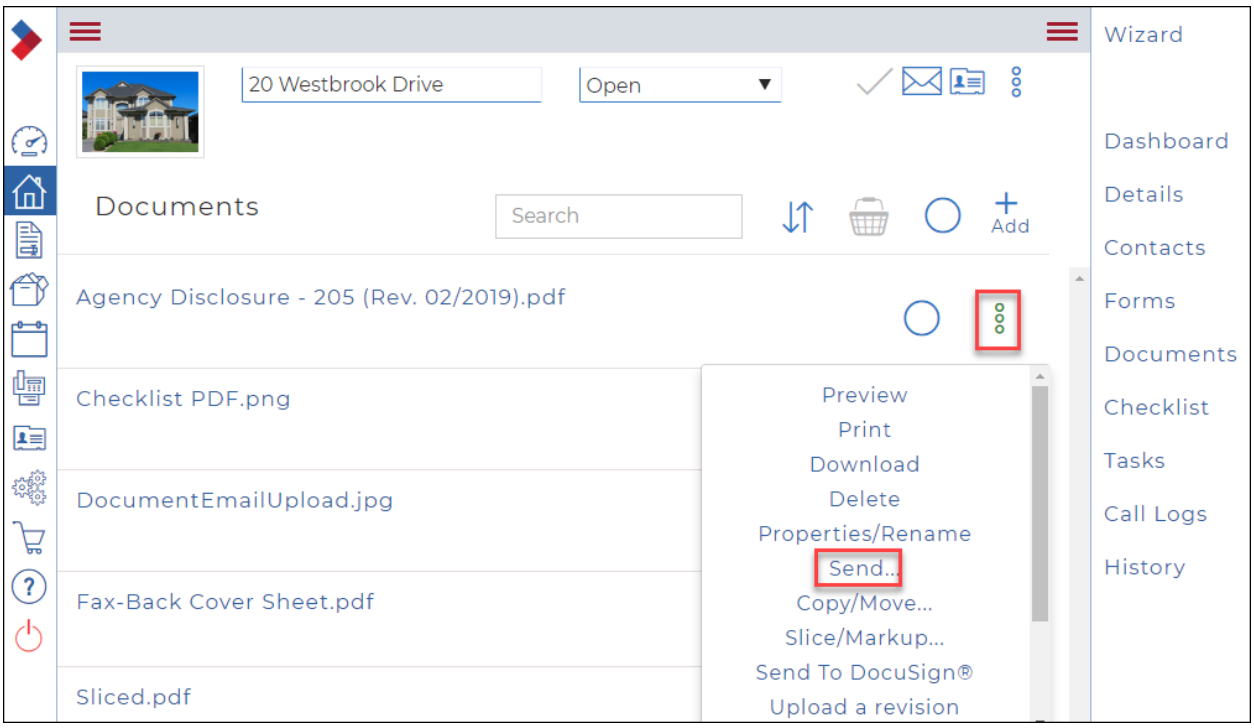
1. In the Sidebar, click **Transaction** .
   Your list of transactions displays.



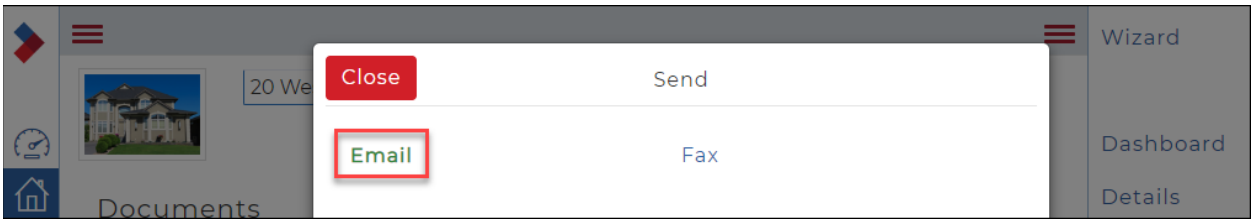
2. Click the transaction you want to email the document from.
   The **Transaction Dashboard** displays.



3. On the right-hand menu, click **Documents**.
   The list of documents attached to the transaction displays.

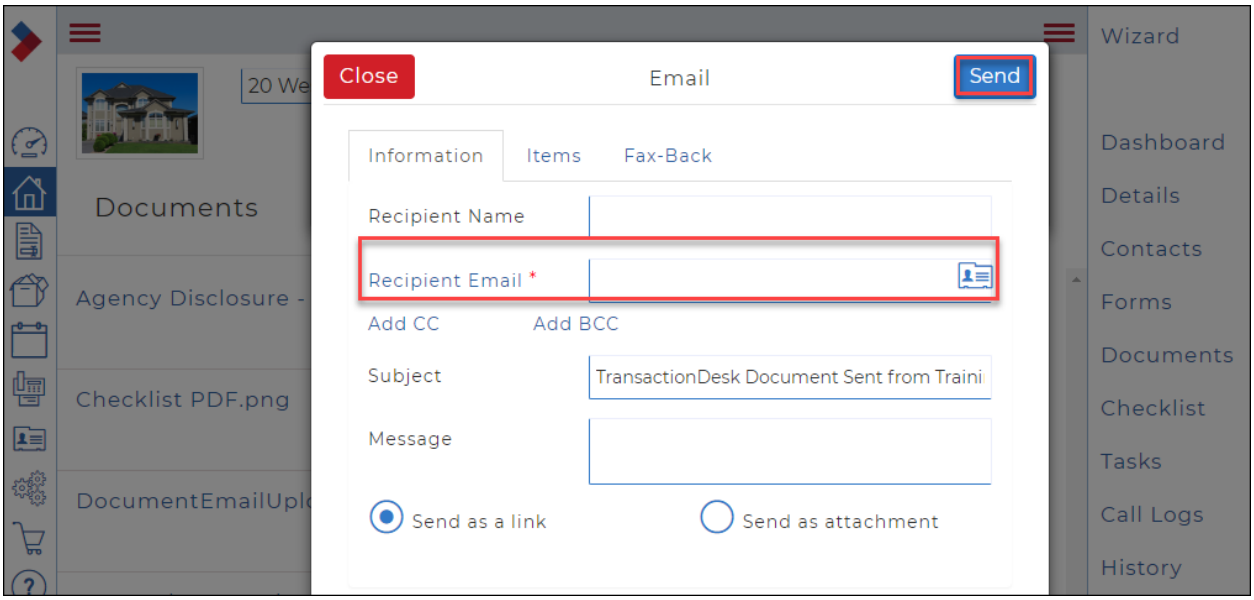


4. Click the **Ellipses Menu** ⋮ to display a dropdown menu.
5. Click **Send**.
   The **Send** dialog box displays.



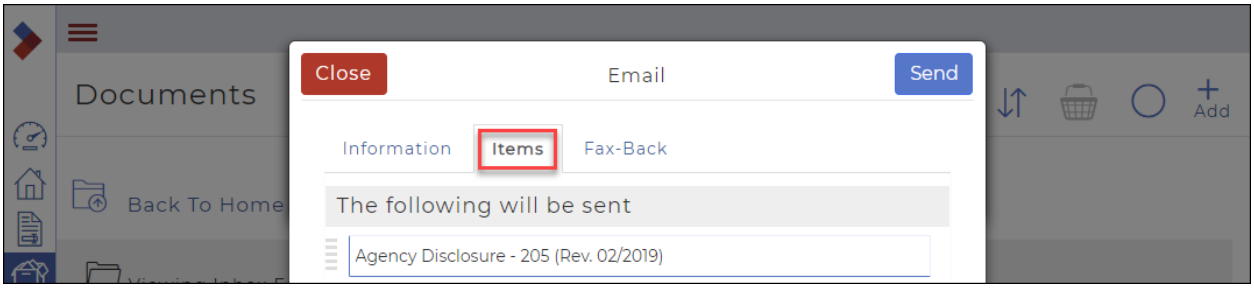
6. Click **Email**.

The **Email** dialog box displays.

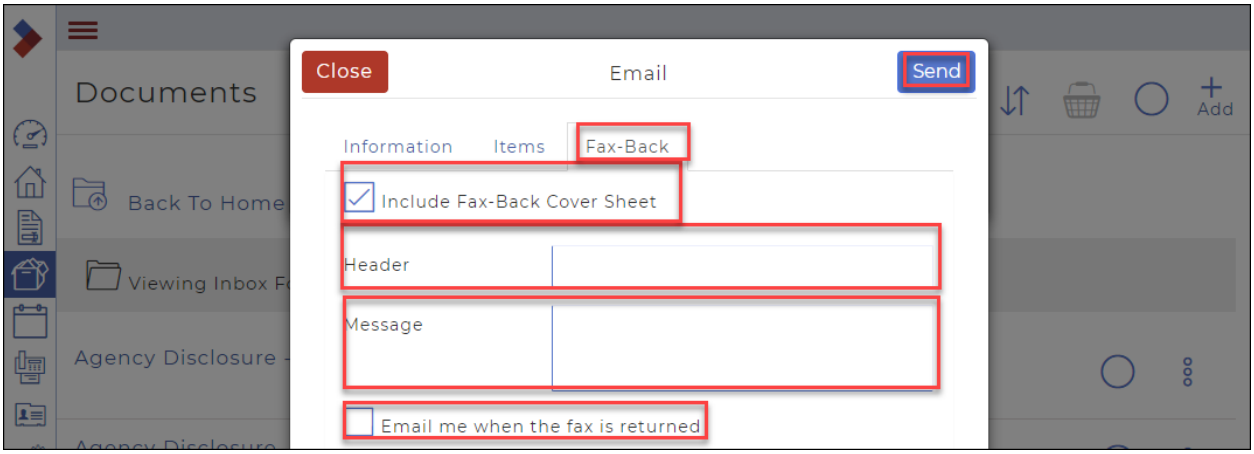


Note: Required fields are indicated by an asterisk.*

7. Use the **Information** tab fields to add information.
   - Optional: **Recipient Name**
   - Required fields: **Recipient Email**
   - Optional: Click **Add CC** to add a CC recipient to the email.
   - Optional: Click **Add BCC** to add a BCC recipient to the email.
   - Optional: **Subject**
   - Optional: **Message**
8. Do one of the following:
   - Click **Send as a link** to include a hyperlink to the document in the body of the email.
   - Click **Send as attachment** to include the document as an email attachment.
9. If you have additional email attachments, use the **Items** tab to arrange the order of the links or email attachments by dragging and dropping the documents.



10. If you need to include a fax back cover sheet with your email, navigate to the **Fax-Back** tab and check **Include Fax-Back Cover Sheet** to display more options.
    - Enter a fax header and body message in the **Header** and **Message** fields.
    - If you require a notification when the fax is completed, check Email me when the fax is returned.



11. When you are finished setting up your email, click **Send**.

    The email is sent to the intended recipient.

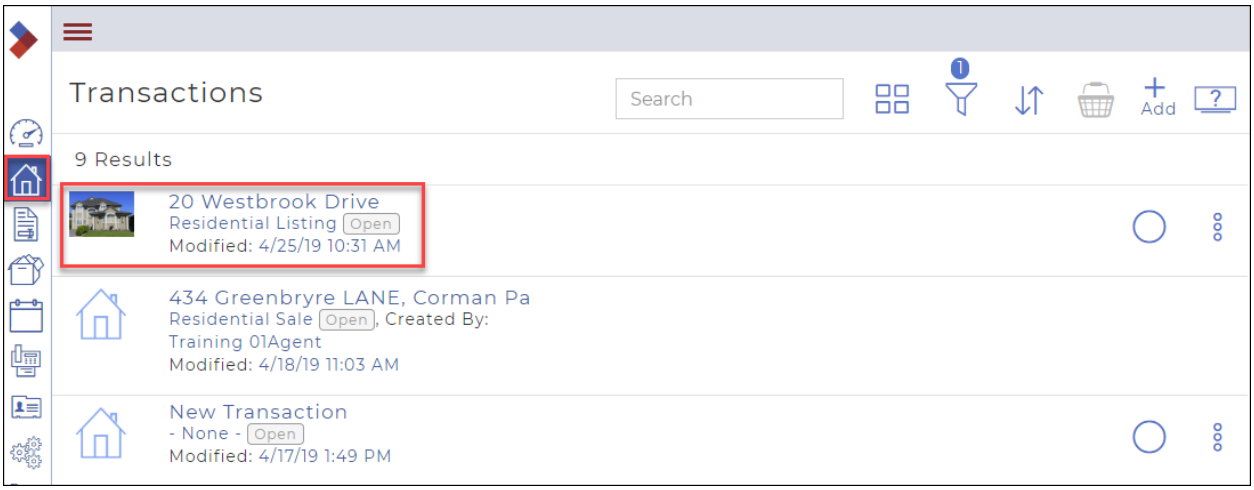
Emailing multiple documents from a transaction

You can use the system to email documents to a specific recipient from within the application. This functionality is convenient because it means that you do not have to download the documents from the system, and then attach them to an email in your email client, and then send it to the recipient.

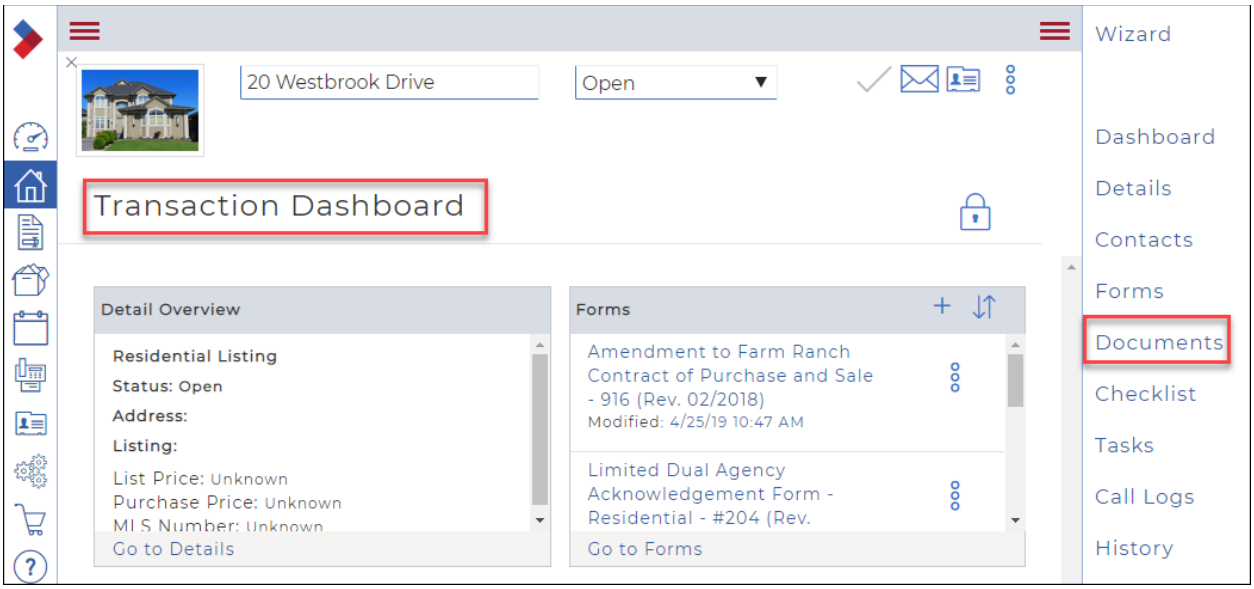
CLICK TO VIEW VIDEO

To email multiple documents from a transaction:

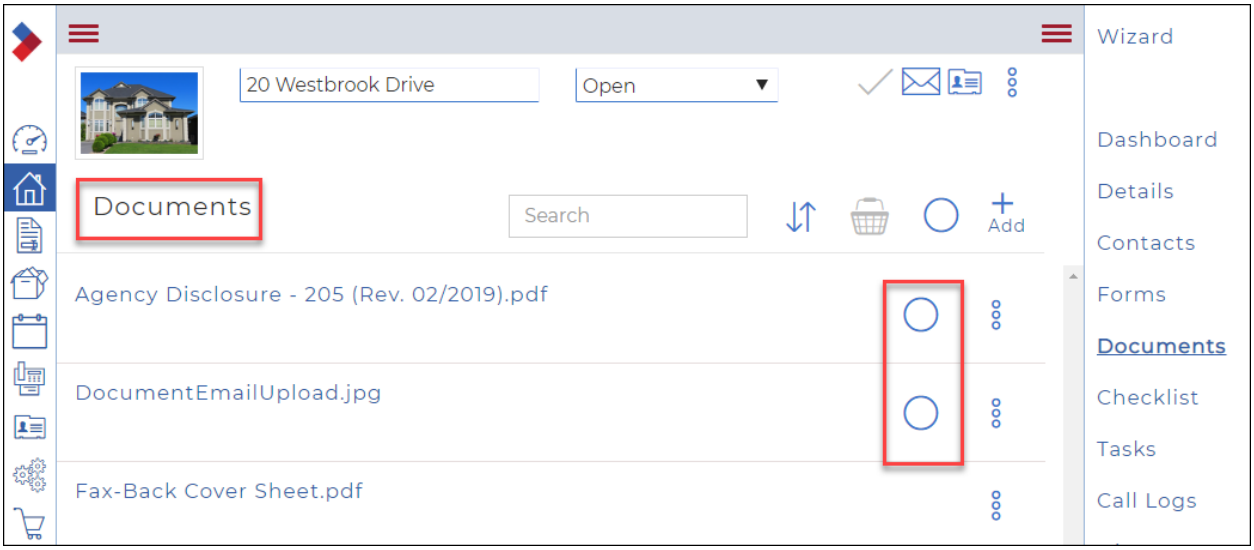
1. In the left sidebar, click **Transactions** .
   The **Transactions** list displays.



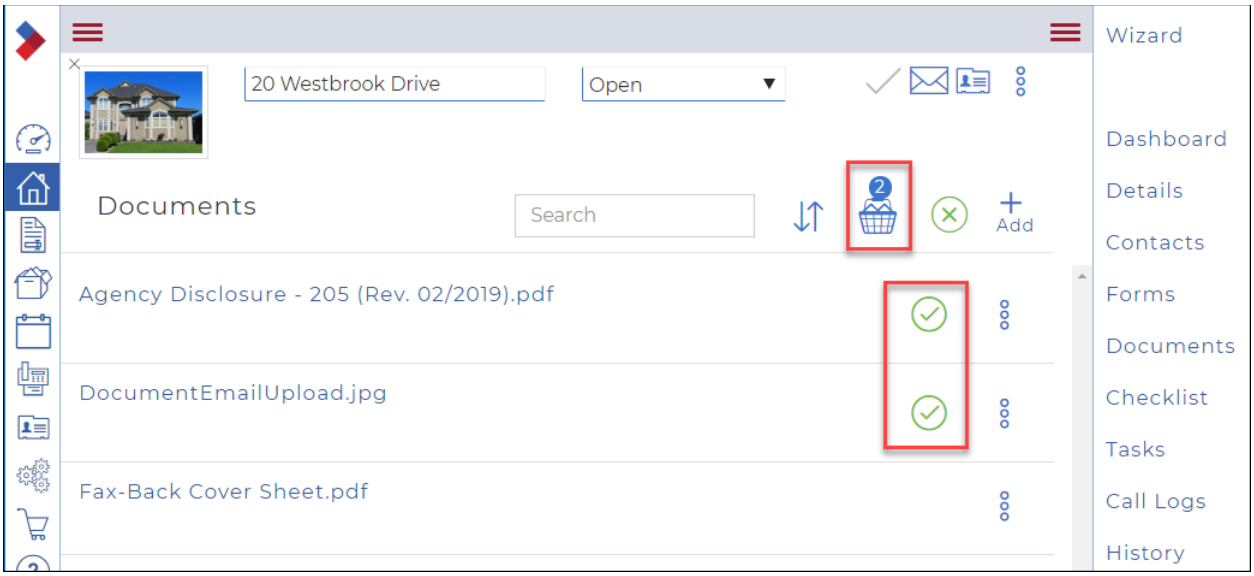
2. Click the name of the transaction that includes the documents you want to email.
   The **Transaction Dashboard** displays.



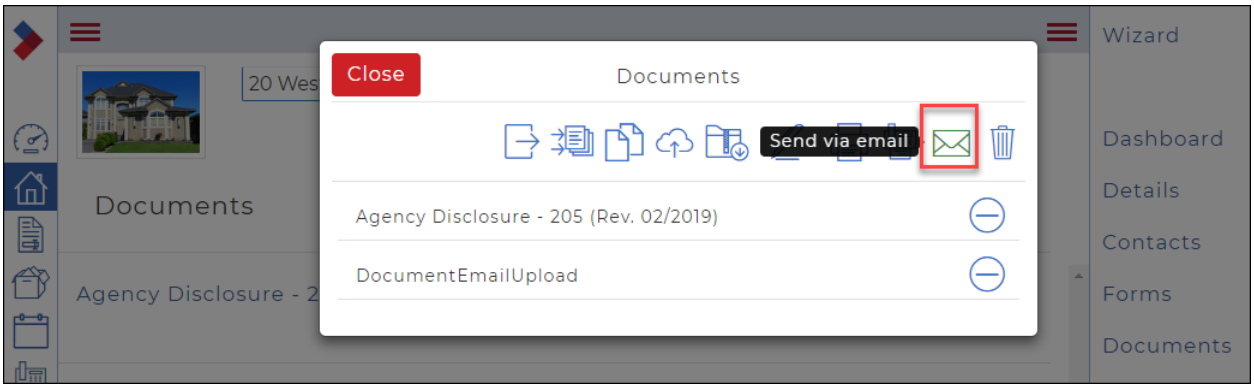
3. In the right sidebar, click **Documents**.
   The **Documents** window for that transaction displays.



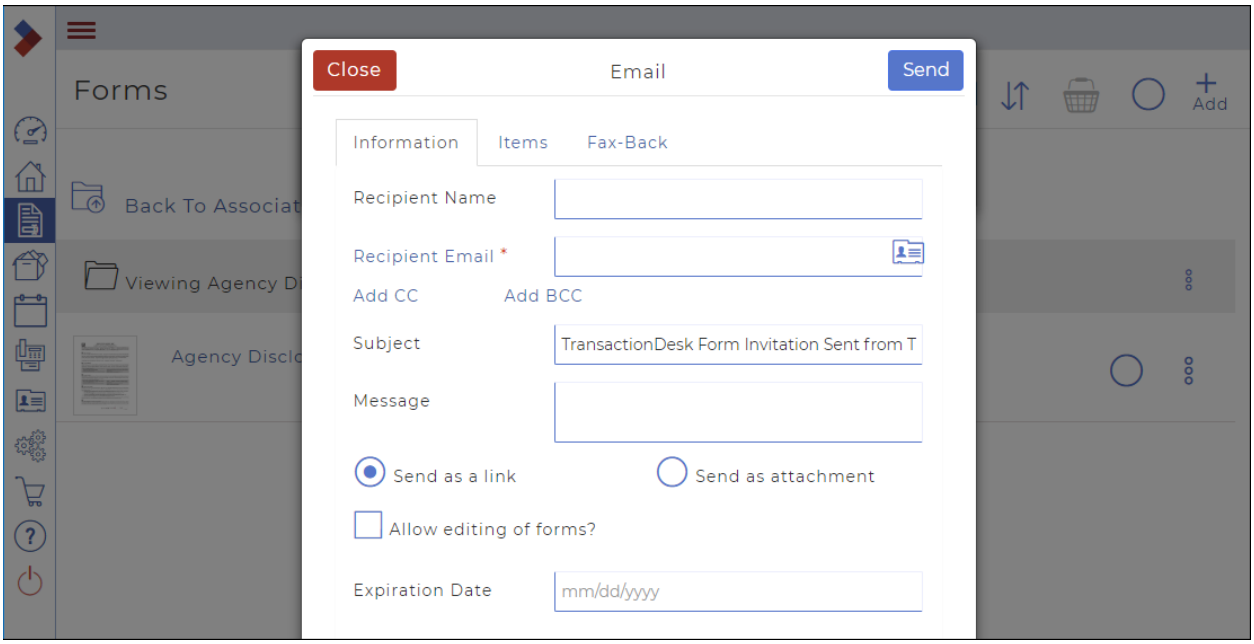
4. Click in the select circle ○ to select the documents you wish to email.
   The documents are added to the basket.



5. Click the **Basket** .
   The **Documents** dialog box displays the documents you selected.



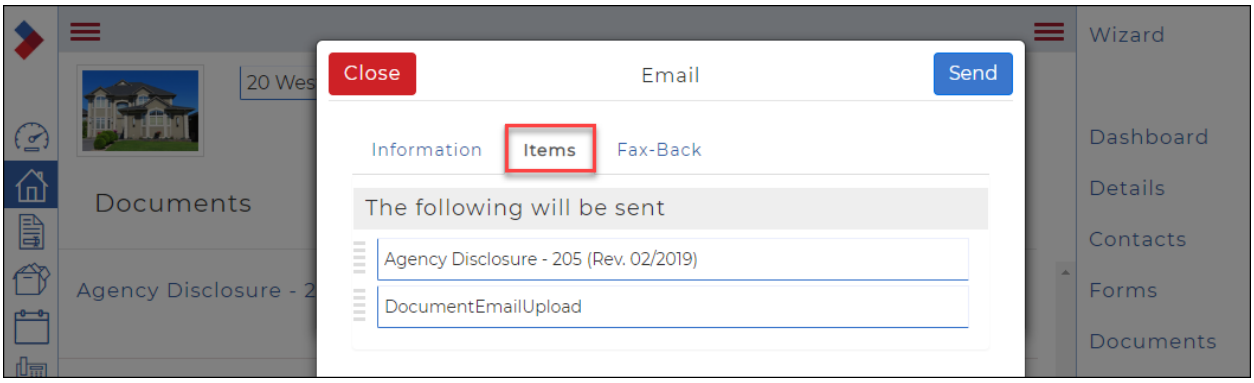
6. Click **Send via email** .
   The **Email** dialog box displays.



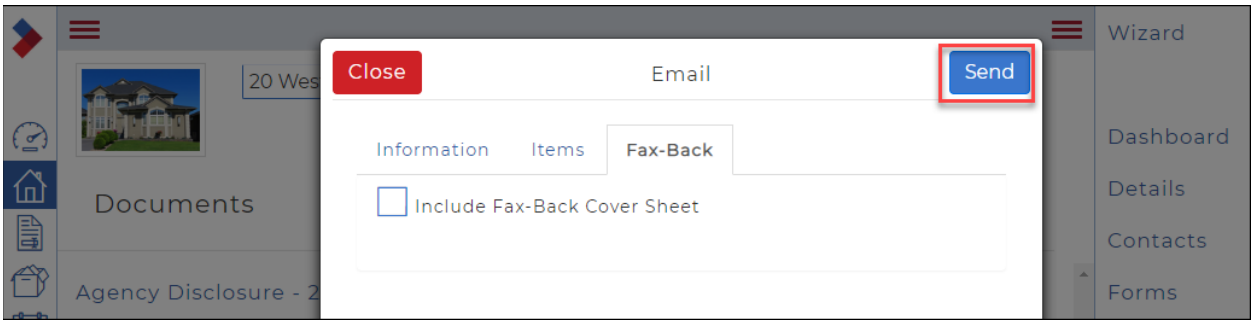
7. Use the Information tab fields to add information about the recipients, and the email subject line and message.

   Note: Required fields are indicated with an asterisk: in this dialog box, the only required field is **Recipient Email**.*

   - Optional: Add the **Recipient Name**
   - Required: Add the **Recipient Email**
   - Optional: Click **Add CC** to add a CC recipient to the email.
   - Optional: Click **Add BCC** to add a BCC recipient to the email.
   - Do one of the following:
     - Click **Send as a link** to include a hyperlink to the document in the body of the email.
     - Click **Send as attachment** to include the document as a .pdf file email attachment.
   - Optional: Use the **Items** tab to view the attached form.

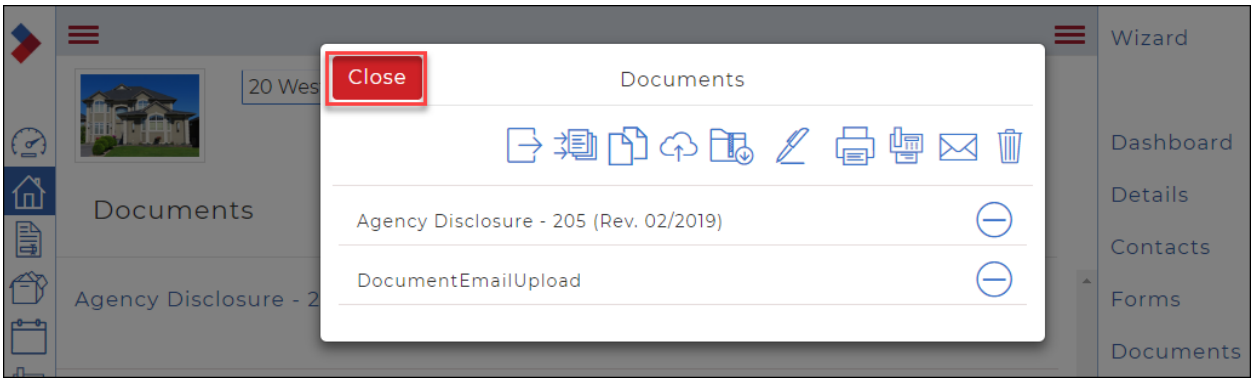


   - Optional: If you need to include a fax back cover sheet with your email, use the **Fax-Back** tab and check **Include Fax-Back Cover Sheet**, and type a fax header and body message in the Header and Message fields.
   - Optional: If you require a notification when the fax is completed, check **Email me when the fax is returned**.



8. When you are finished setting up your email, click **Send**.

   The email is sent to the intended recipient with the attached forms.



9. Click **Close** to close the **Send** dialog box.

Emailing a document to a fax machine

You can email a document direction from your system account email address to a fax number. For example: If you are away from the office and have a completed form that you need to send to a lawyer that uses fax, you can email the document directly to the fax machine. This is a convenient function that enables you to continue to work in the field, rather than having to make frequent trips back to the office to use the fax machine.

> *Note: This requires an available email client (such as MS Outlook), available DocBox on your account, vanity fax upgrade on your account, and available personal fax number.*

To email a document to a fax machine:

1. Open your email client, such as MS Outlook.
2. Create a new email message.
3. Attach any documents you need to fax to the email.
4. Enter the number of the fax machine you need to send the document to in the Subject line using the following format: ###-###-####.
5. Enter the following address in the recipient field: email2fax@transactiondesk.com.
6. Send your email.

   The documents are sent to the fax number specified in the email subject line.

   An email is automatically sent to your email address, informing you that your fax was received is in the send queue.

   An email is automatically sent to your email address informing you whether the fax succeeded or failed.

   Note: The size of the fax determines the wait time for the success/failure email.

Faxing a single document

You can use the system to fax a document to a specific recipient. For example, if you are working with an outside broker on the other side of town that only receives deal documents via fax, you can fax them the required documents for them to sign and send back.

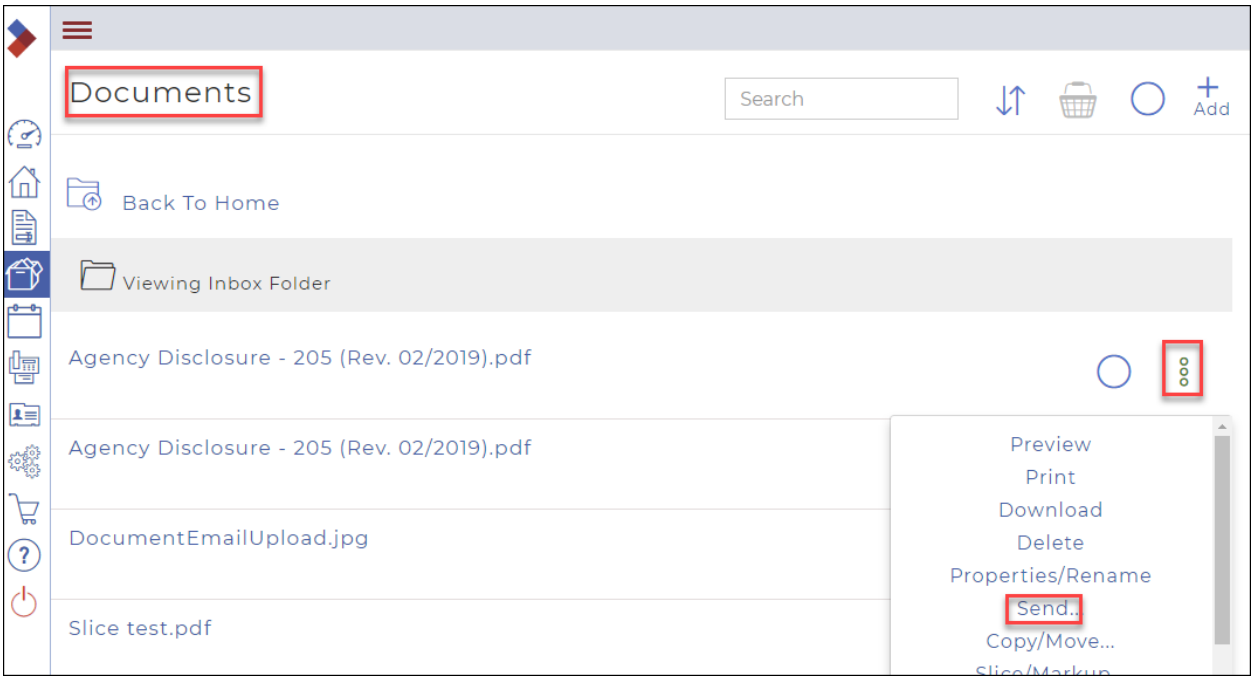
You can fax documents

- contained in the Inbox, My, Shared, and Transaction folders in Documents, and
- from a transaction.

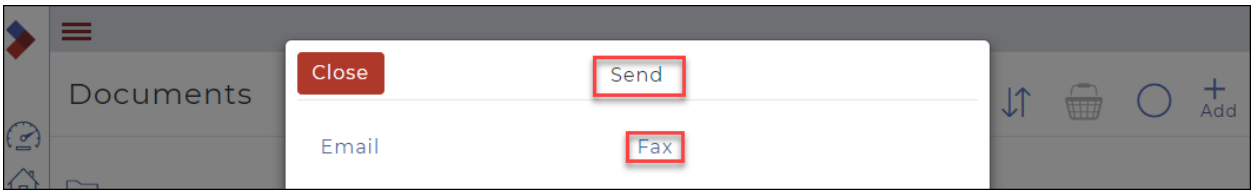
CLICK TO VIEW VIDEO

To fax a single document:

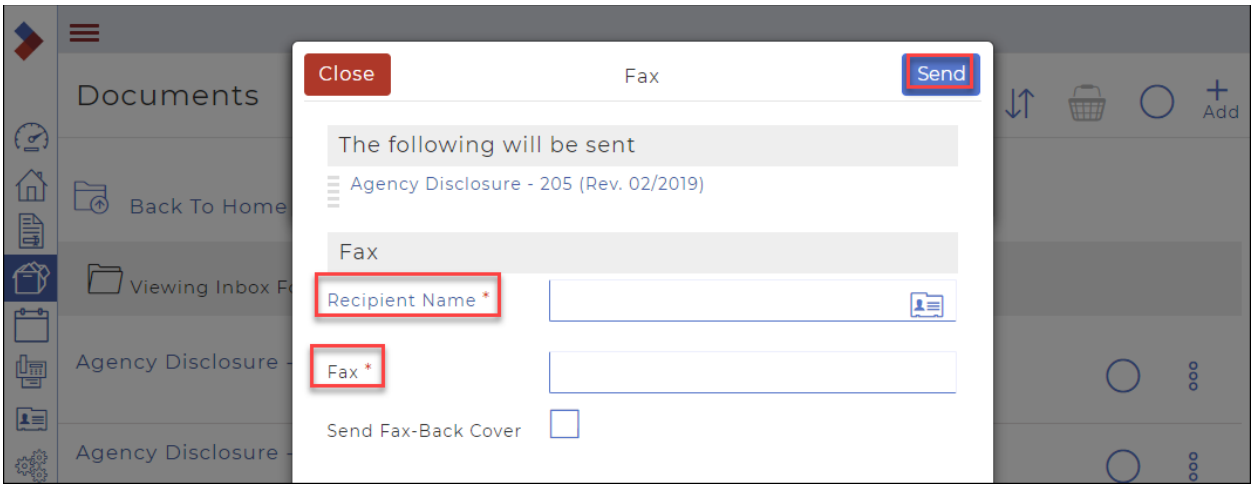
1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Locate the document you want to fax and click the **Ellipses Menu** beside the document.
   The dropdown menu displays several actions.



3. Click **Send**.
   The **Send** dialog box displays.

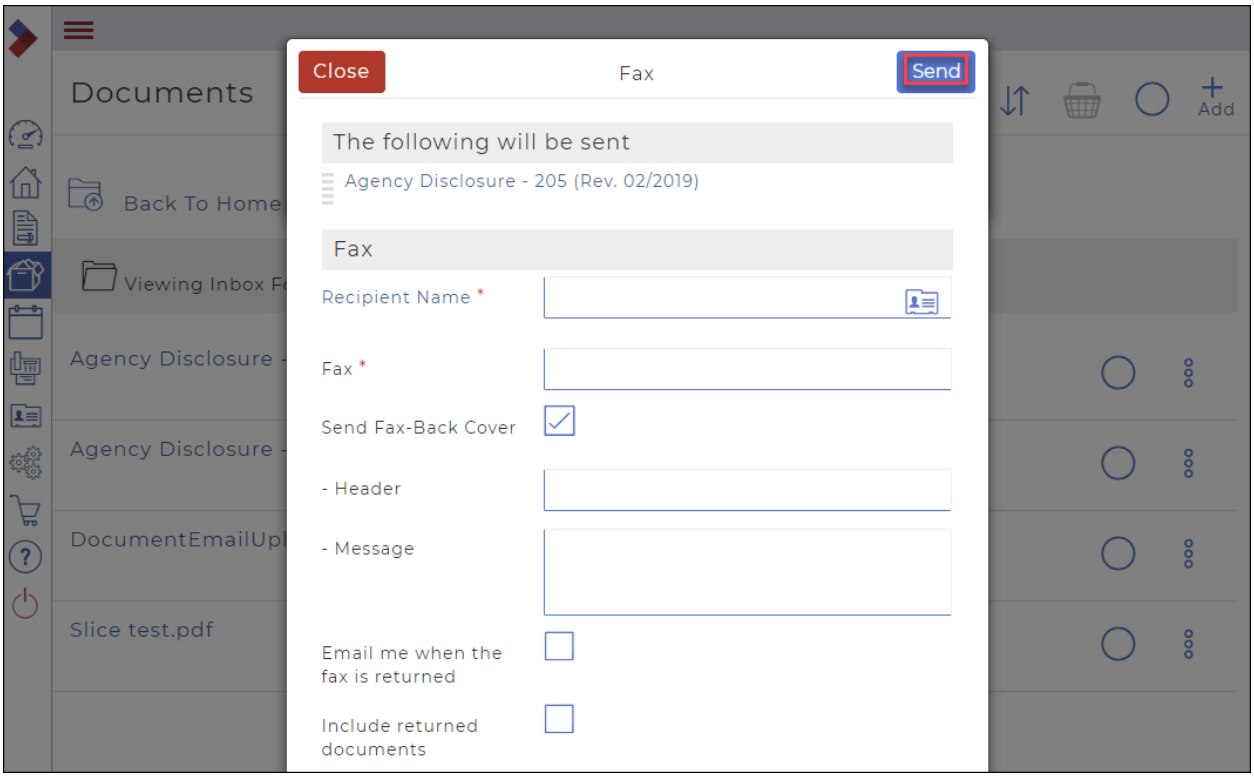


4. Click **Fax**.
   The **Fax** dialog box displays.



Note: Required fields are indicated by an asterisk.*

5. Use the **Recipient Name** field to enter the name of the fax recipient.
6. Enter the fax number in the **Fax** field.
7. If you need to include a fax back cover sheet, check **Include Fax-Back Cover Sheet**.
   Additional fields display.



8. Enter a fax header and body message in the **Header** and **Message** fields.
9. If you require a notification when the fax is completed, check **Email me when the fax is returned**.
10. If you need to include copies of any returned documents in the returned fax notification email, check **Include returned documents**.
11. When you are finished adding your fax information, click **Send**.
    Your fax is sent to the specified number.

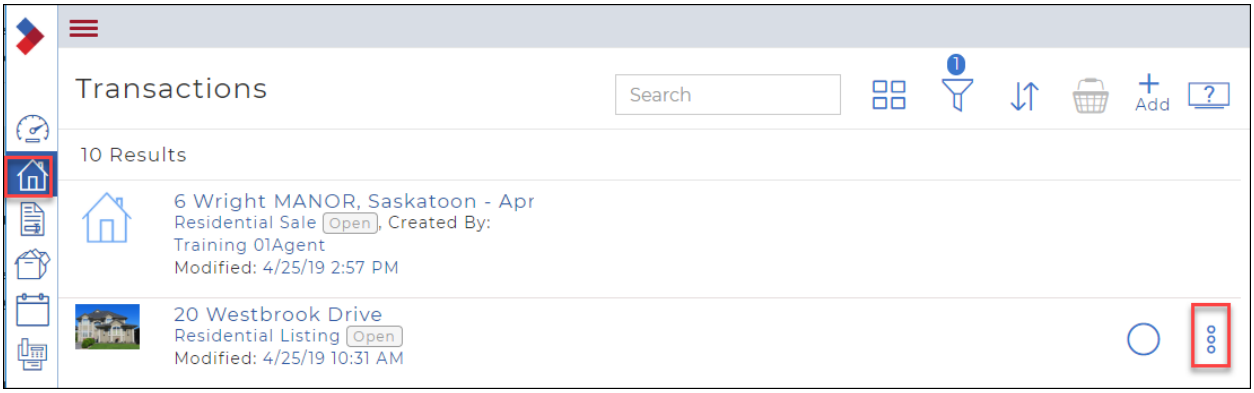
Faxing a document from a transaction

You can send a form that is attached to a transaction via fax.

CLICK TO VIEW VIDEO

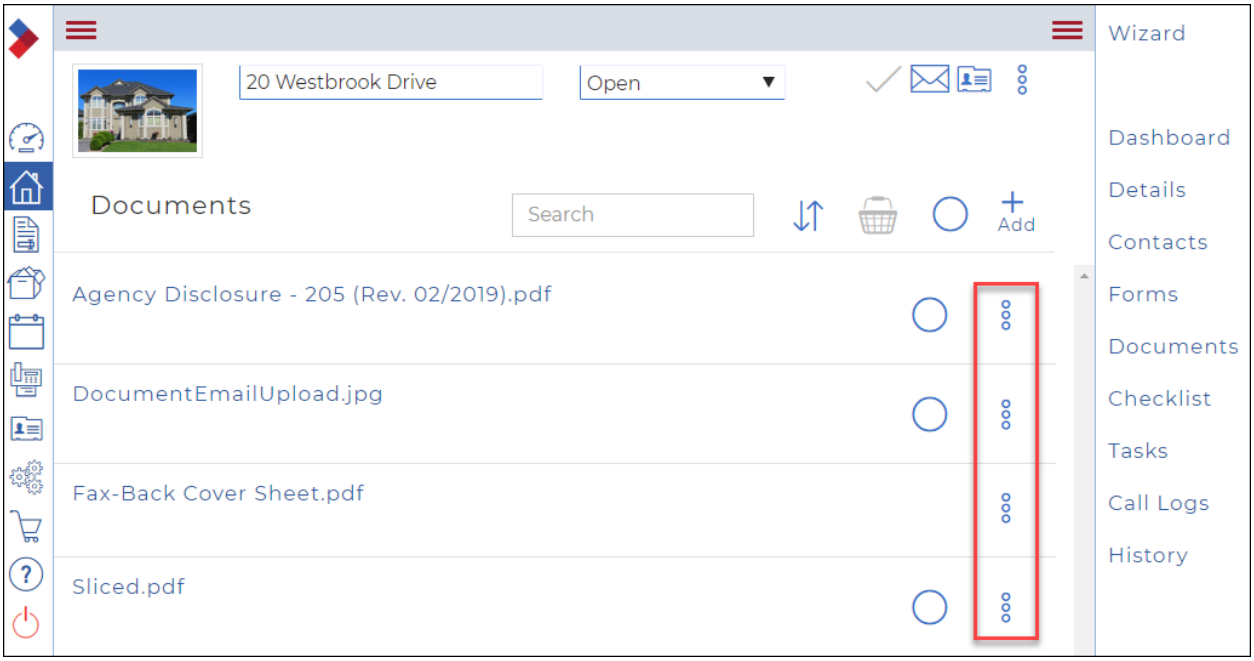
To fax a document from a transaction:

1. Click **Transactions.**
   The **Transactions** list displays.

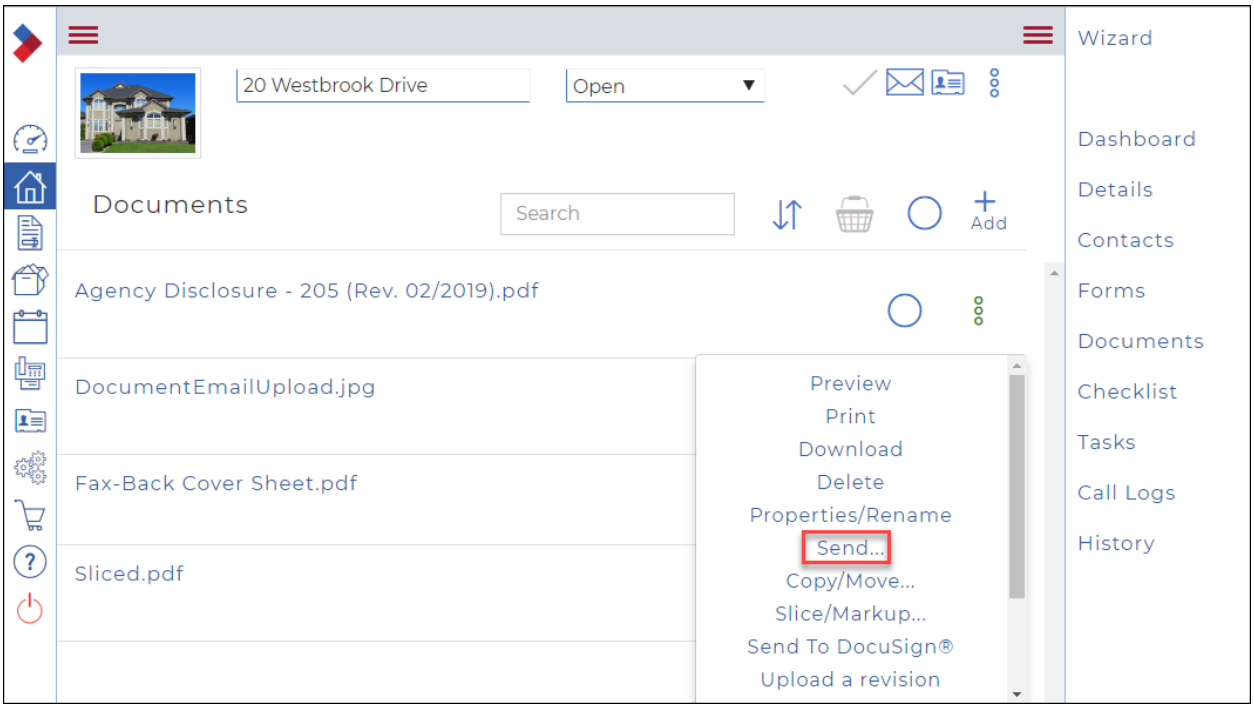


2. Click the **Ellipses Menu** beside the transaction that includes the document you want to fax.
   A dialog box displays the possible actions.

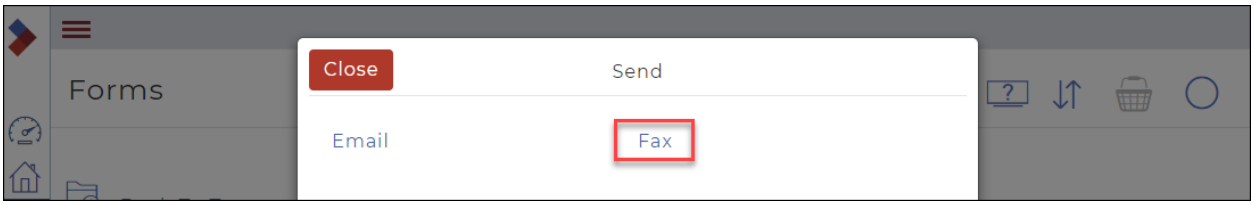
3. Click **Documents.**
   A list of documents attached to the transaction displays.



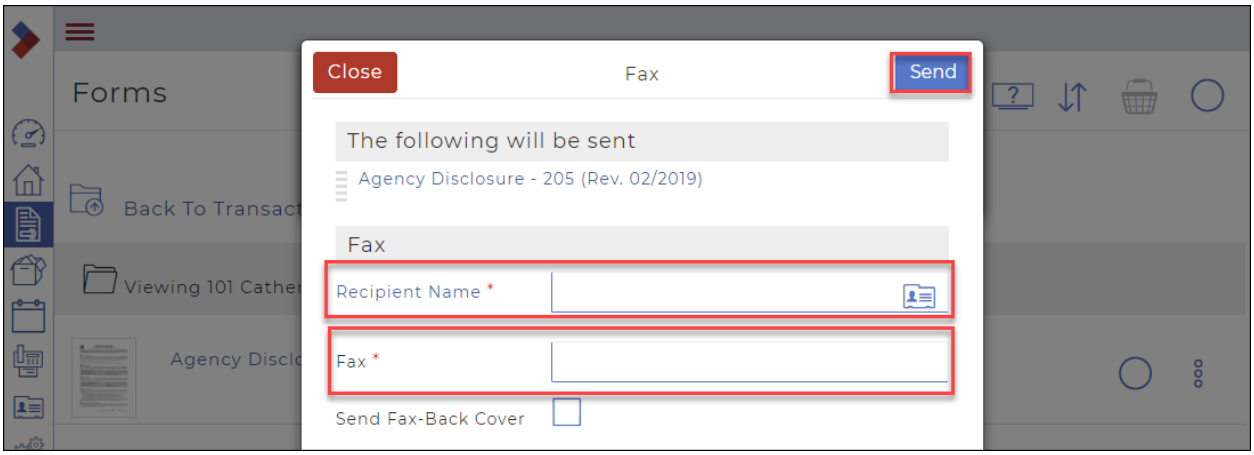
4. Click the **Ellipses Menu** ⋮.
   A dropdown menu displays a list of actions.



5. Click **Send**.
   The **Send** dialog box displays.



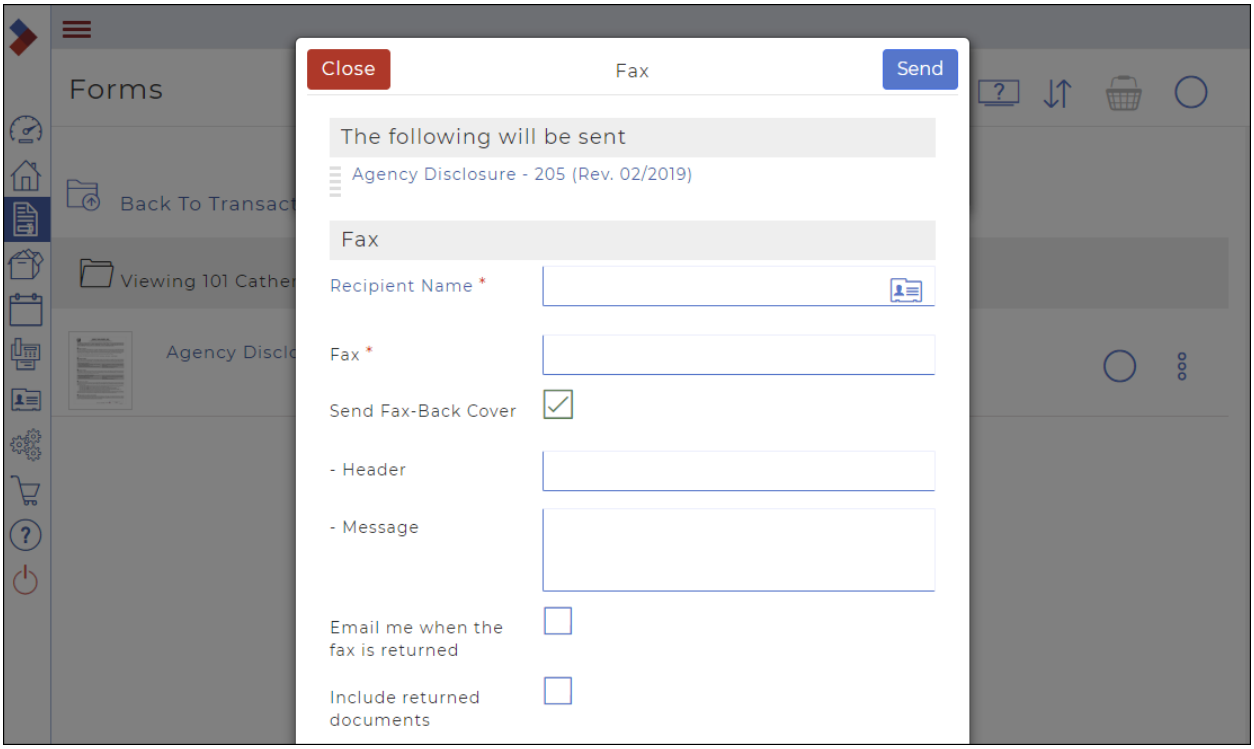
6. Click **Fax**.
   The **Fax** dialog box displays.



7. Add the required information.

   Note: Required fields are indicated with an asterisk.*

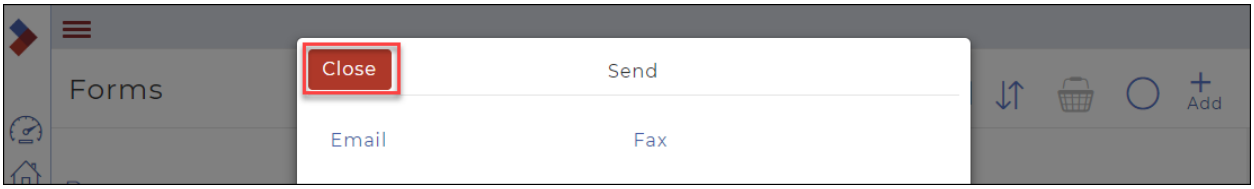
   - Required: Enter the name of the fax recipient in the **Recipient Name** field
   - Required: Enter the fax number in the **Fax** field.
   - Optional: If you need to include a fax back cover sheet, check Include **Fax-Back Cover Sheet**, and enter a fax header and body message in the Header and Message fields.
   - Optional: Check **Email me** when the fax is returned if you require a notification when the fax is completed.
   - Optional: Check **Include returned documents** if you need to include copies of any returned documents in the returned fax notification email.



8. When you are finished adding your fax information, click **Send**.

   The fax is sent to the intended recipient with the attached document.

9. Click **Close** to close the **Send** dialog box.



Faxing multiple documents

You can use the system to fax documents to a specific recipient. For example, if you are working with an outside broker on the other side of town that only receives deal documents via fax, you can fax them the required documents for them to sign and send back.

You can fax documents

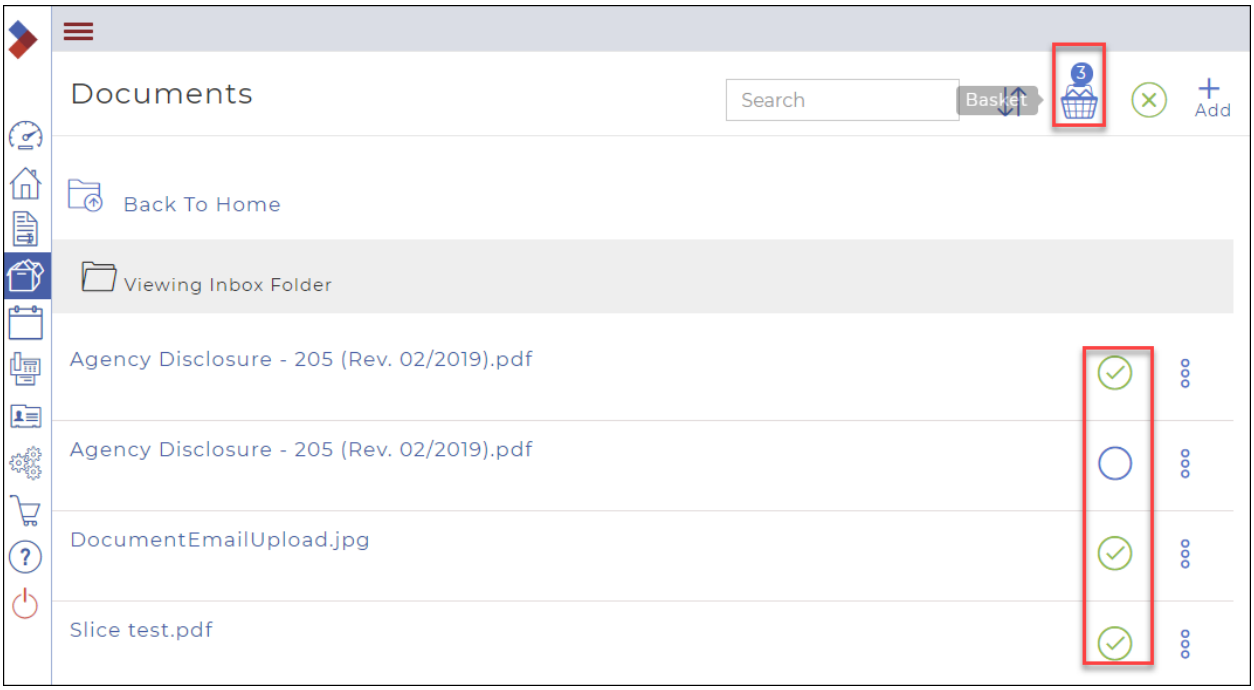
- contained in the Inbox, My, Shared, and Transaction folders in Documents, and
- from a transaction.

CLICK TO VIEW VIDEO

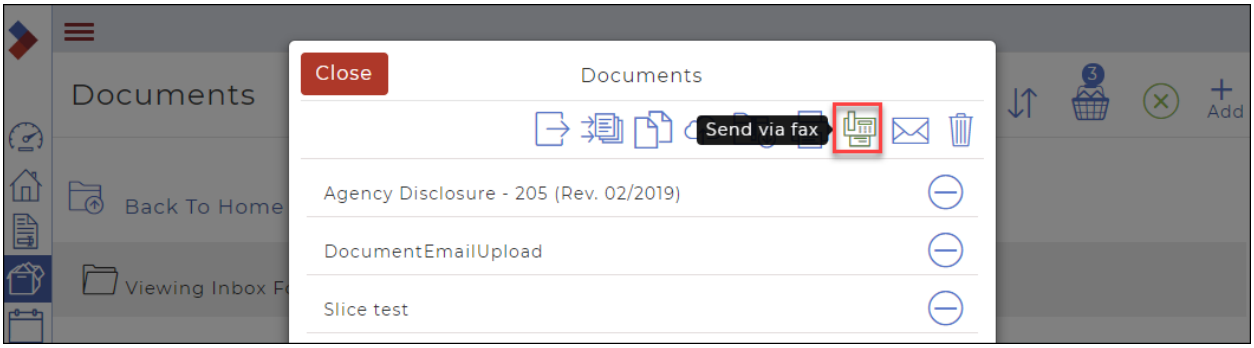
To fax multiple documents:

1. In the Sidebar, click **Documents** .
   The **Documents** window displays.
2. Select the documents you want to email by clicking in the Select circle .

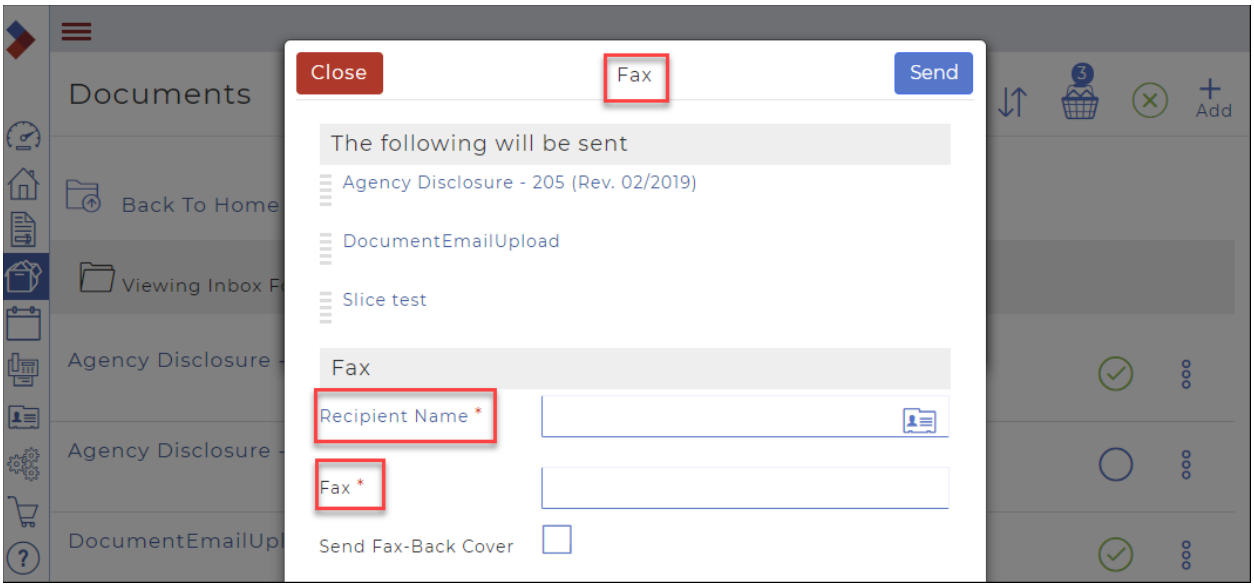
The documents are added to the basket, and the number of documents is indicated above the basket.



3. Click the Basket .
   The **Documents** dialog box displays.

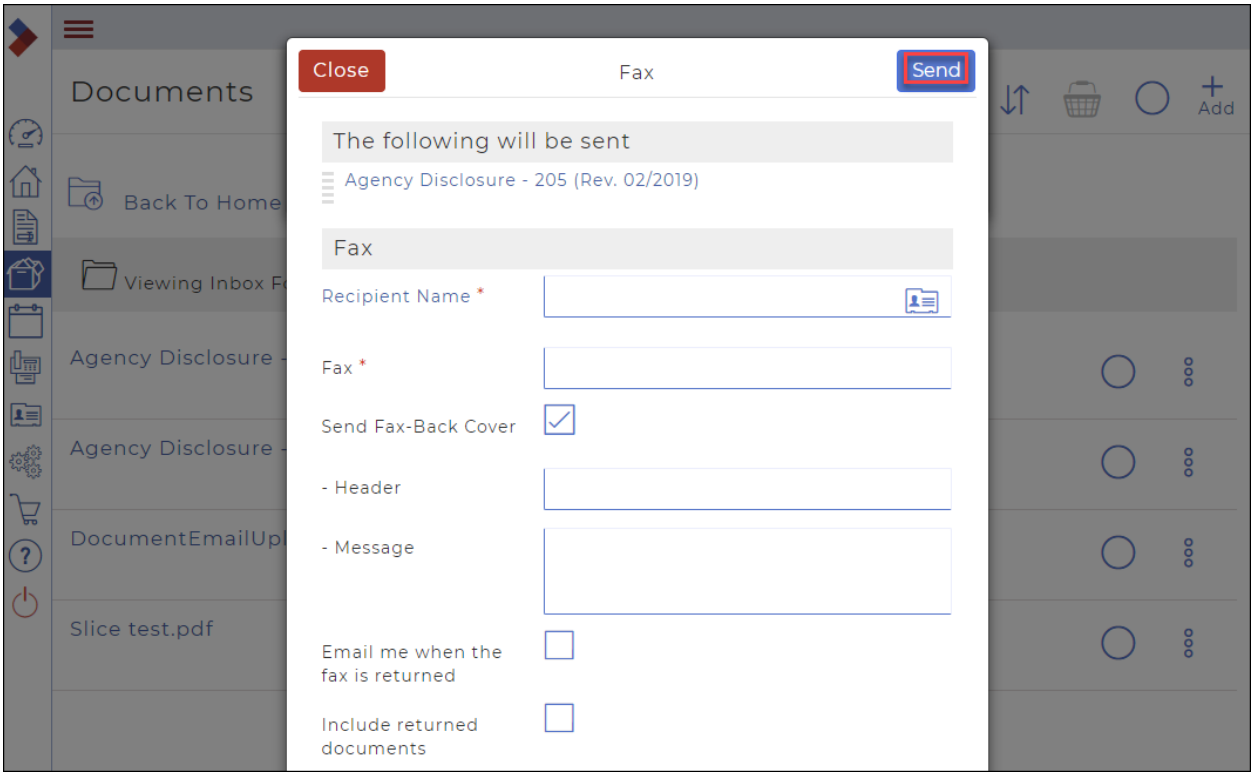


4. Click **Send via fax** .
   The **Fax** dialog box displays.



Note: Required fields are indicated by an asterisk.*

5. Use the **Recipient Name** field to enter the name of the fax recipient.
6. Enter the fax number in the **Fax** field.
7. If you need to include a fax back cover sheet, check **Include Fax-Back Cover Sheet**. Additional fields display.



8. Enter a fax header and body message in the **Header** and **Message** fields.
9. If you require a notification when the fax is completed, check **Email me when the fax is returned**.

10. If you need to include copies of any returned documents in the returned fax notification email, check **Include returned documents**.
11. When you are finished adding your fax information, click **Send**.
    Your fax is sent to the specified number.

Organizing the document folders

You can organize the folders containing your documents, enabling you to maximize your productivity by easily locating the documents you need, when you need them. Depending on which default folder you view, you can create, rename, and delete your folders until they are arranged in a way that makes the most sense for your business.

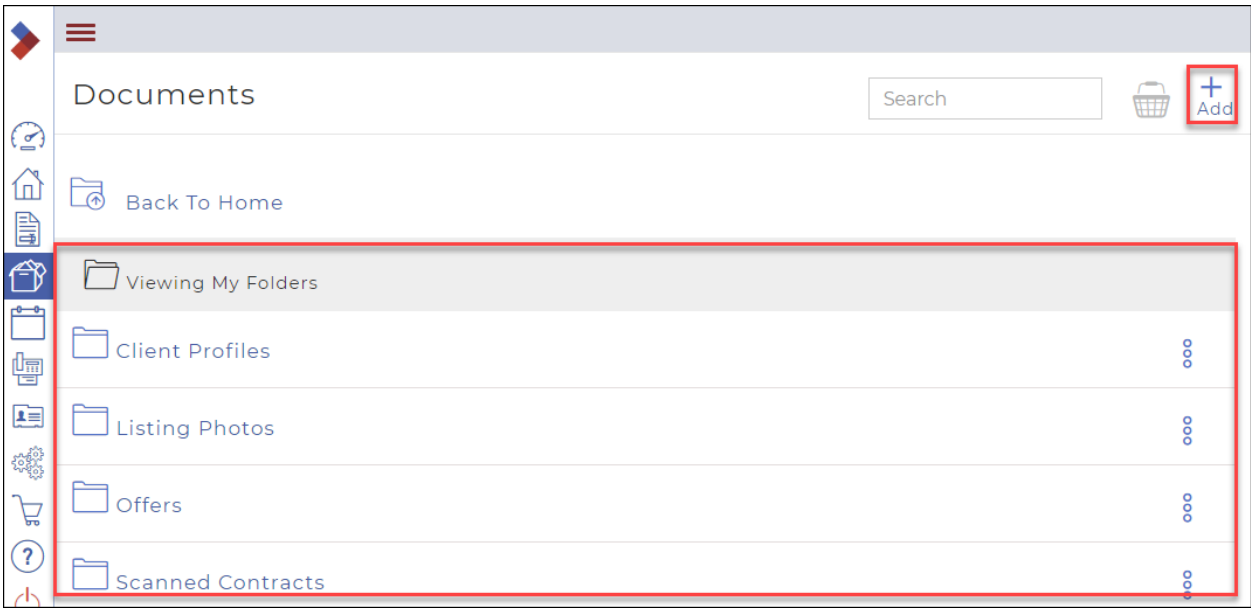
Creating a custom folder

You can create custom folders in the My Folders default folder in order to keep your documents organized and easy to locate. For example, you can create a folder named Email Uploads, and store all your documents that are uploaded via email in this folder until you need them.

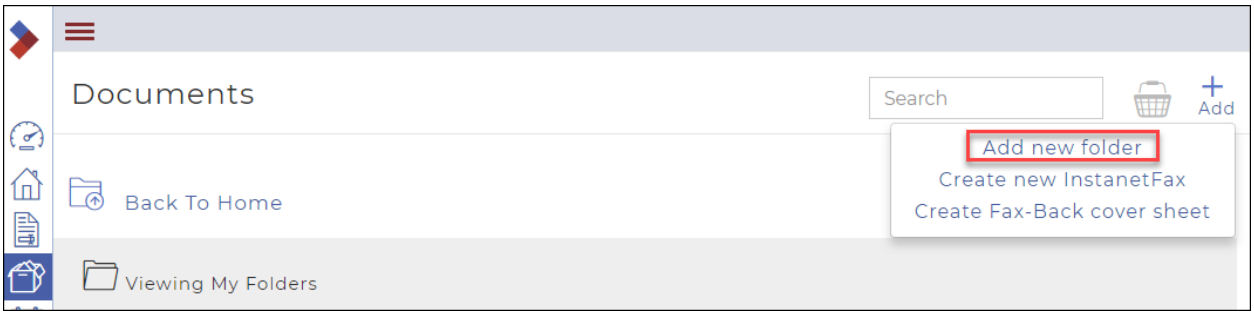
To create a custom folder:

1. On the Sidebar, click **Documents**.
   The **Documents** window displays.

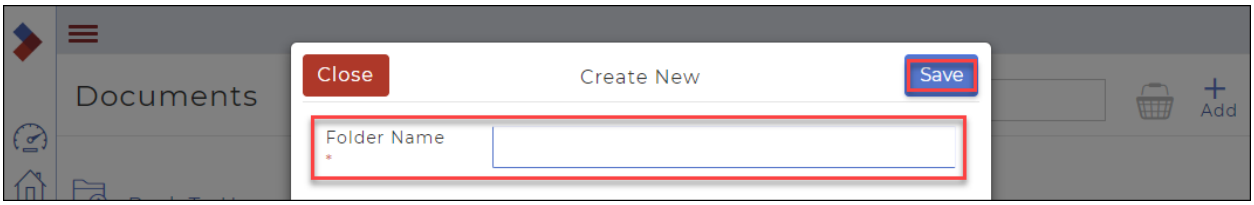
2. Click **My Folders**.
   The subfolders in **My Folders** display.



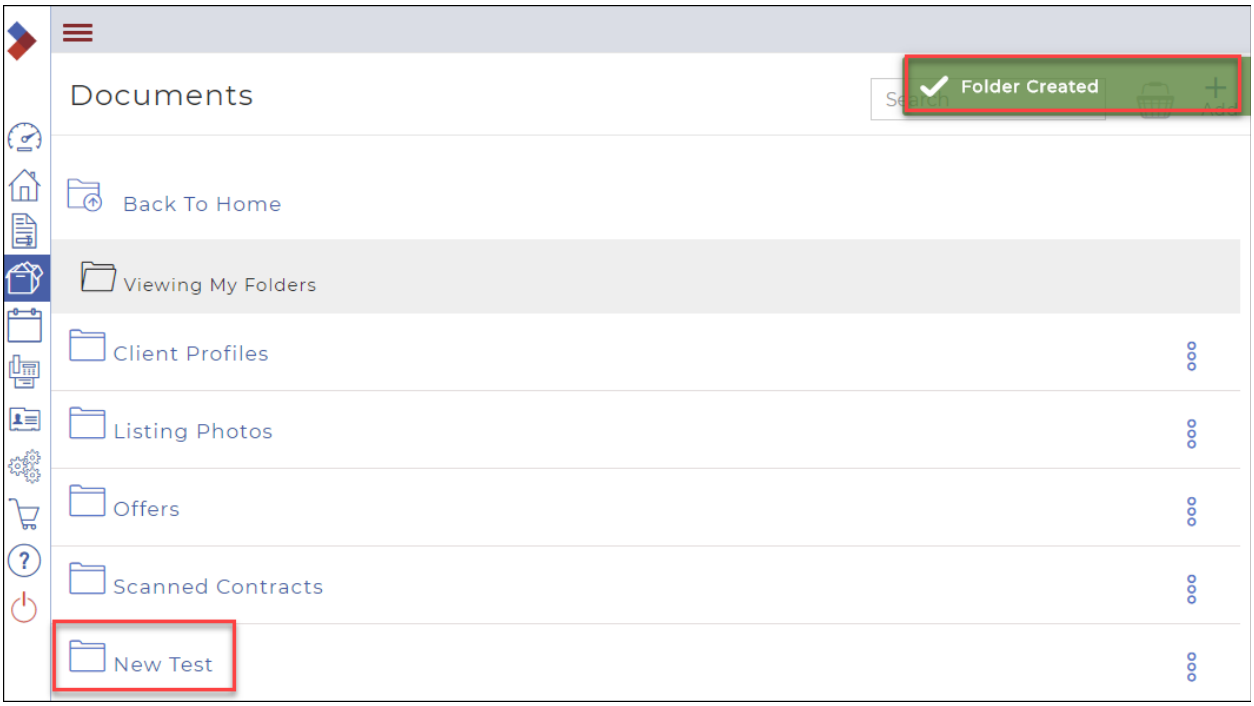
3. Click **Add**.
   A dropdown menu displays several actions.



4. Click **Add new folder**.
   The **Create New** dialog box displays.



5. Enter a name for the folder in the **Folder Name** field.
6. Click **Save**.
   A confirmation message briefly displays in the top right, and your new folder is created.



Renaming a custom folder

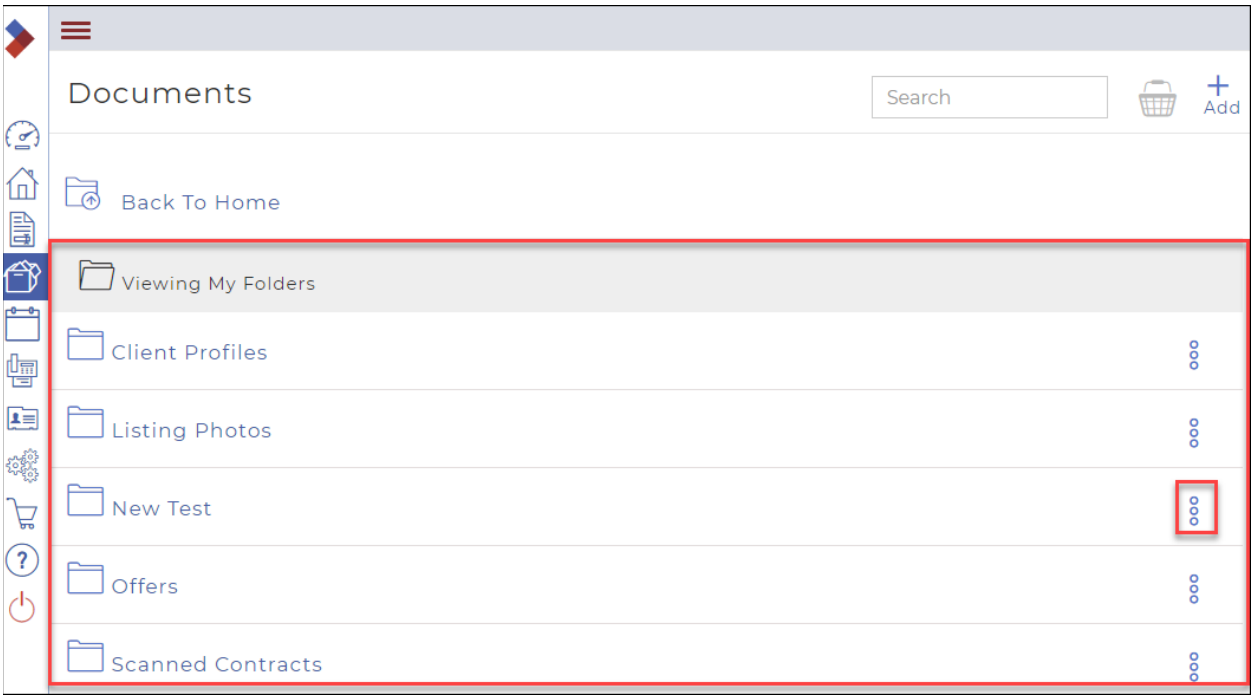
You can rename the custom folders you create in the My Folders default folder at any time.

CLICK TO VIEW VIDEO

To rename a custom folder:

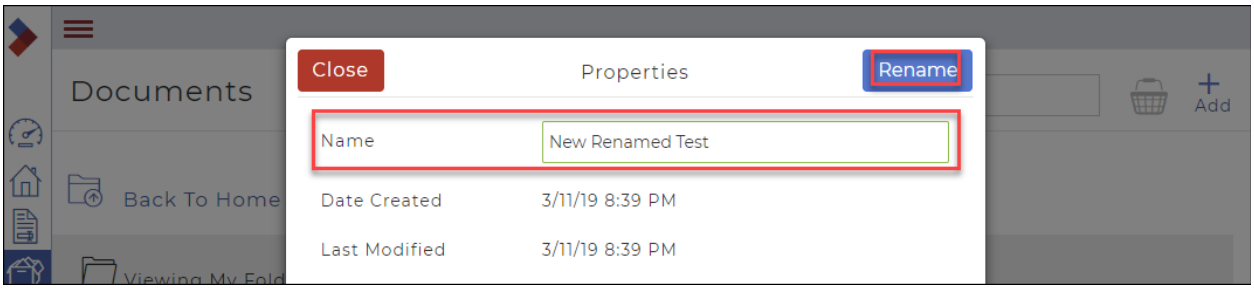
1. On the Sidebar, click **Documents**.
   The **Documents** window displays.

2. Click **My Folders**.
   The subfolders in **My Folders** display.



3. Click the **Ellipses Menu** ⋮.
   A dropdown menu displays.

4. Click **Properties/Rename**.
   The **Properties** dialog box displays.



5. Enter the new name of the folder in the **Name** field.
6. Click **Rename**.
   A confirmation message briefly display in the top right corner, and the folder name is updated in the list of folders.

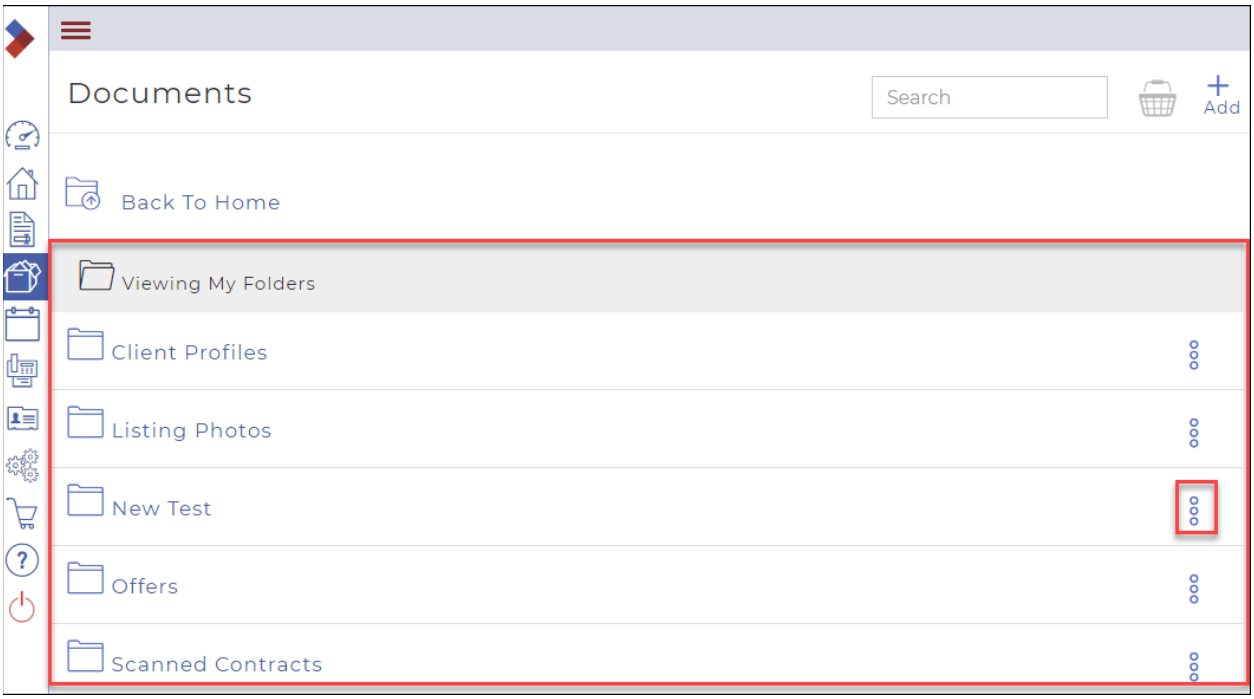
Deleting a custom folder

You can delete a custom folder in the My Folders default folder at any time.

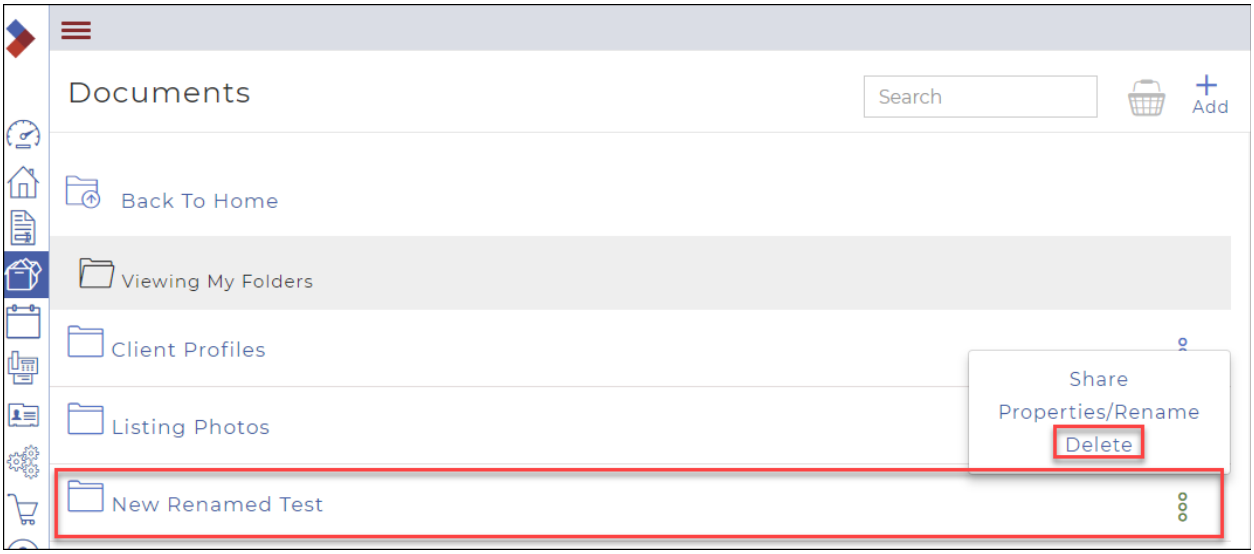
To delete a custom folder:

1. On the Sidebar, click **Documents**.
   The **Documents** window displays.

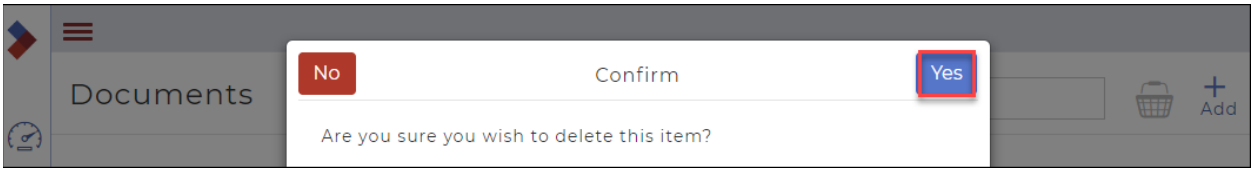
2. Click **My Folders**.
   The subfolders in **My Folders** display.



3. Click the **Ellipses Menu** ⋮.
   A dropdown menu displays.

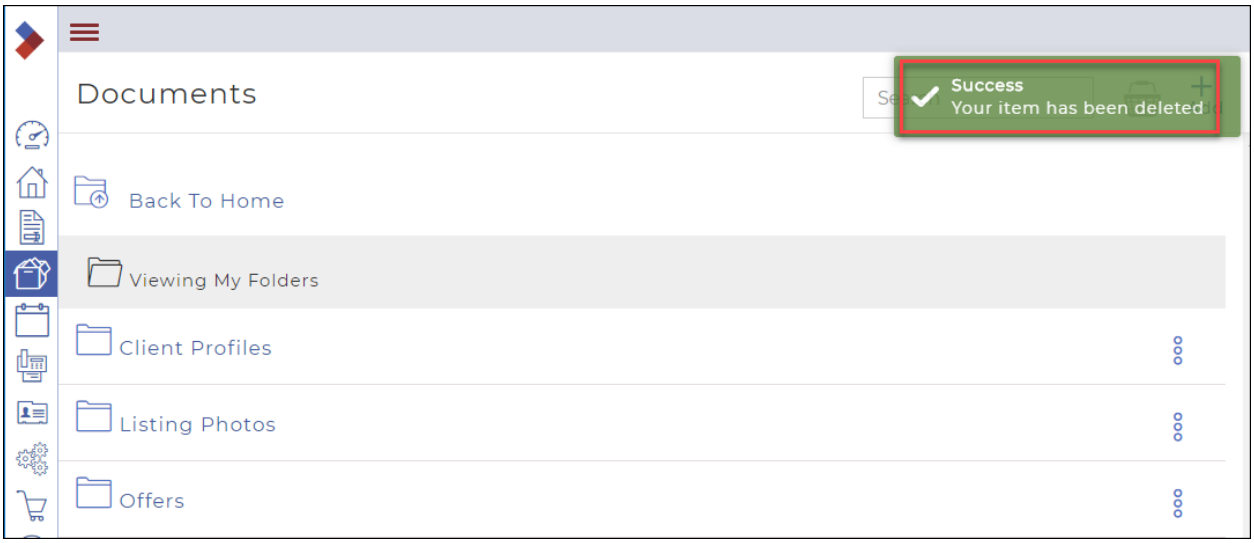


4. Click **Delete**.
   A **Confirm** dialog box displays.



5. Click **Yes**.

A confirmation message briefly displays in the top right corner, and the folder is removed from the list of folders in My Folders.



Working with Clauses

A Clause is a specific provision or section in a form or document. On some forms (such as Schedules and Addendums), you can insert a wide variety of clauses. These include clauses provided by your Provincial Association, Board Clauses, recommended clauses provided by your office, or your own custom clauses.

You can create standard clauses that can be reused in multiple documents. You can create clauses for your own personal use, or for the other salespeople in the office to use. You can also view system clauses that are available to all members of your board.

You can organize the clauses you create into folders, so they are easy to locate.

This section includes

Understanding clauses

Creating a personal clause

Creating a clause folder

Previewing and editing a clause

Moving a clause

Deleting a personal clause

Inserting a clause into a form

Understanding clauses

Clauses are in the Setup menu and can be accessed by clicking **Setup** in the Sidebar.

There are three categories of clauses:

1. Each user can create their own personal clauses, which they can view in their **Personal Clauses** folder.

2. Each user can view the system clauses provided by their Provincial Association and Board/Association; these can be viewed in the **System Clauses** folder.
3. Brokerage owners can create custom office clauses that can be viewed by all their Office; these will display in the **Office Clauses** folder, but only for REALTORS® in that office.

While you may use the Provincial/Board/Association/Office clauses, you may also want to have a list of clauses used only by you. WEBForms® allows each user to create custom-built clauses. Personal clauses are stored on the WEBForms® server, so that you may access them at any time, and are password protected so that only you may use your personal clauses.

Creating a personal clause

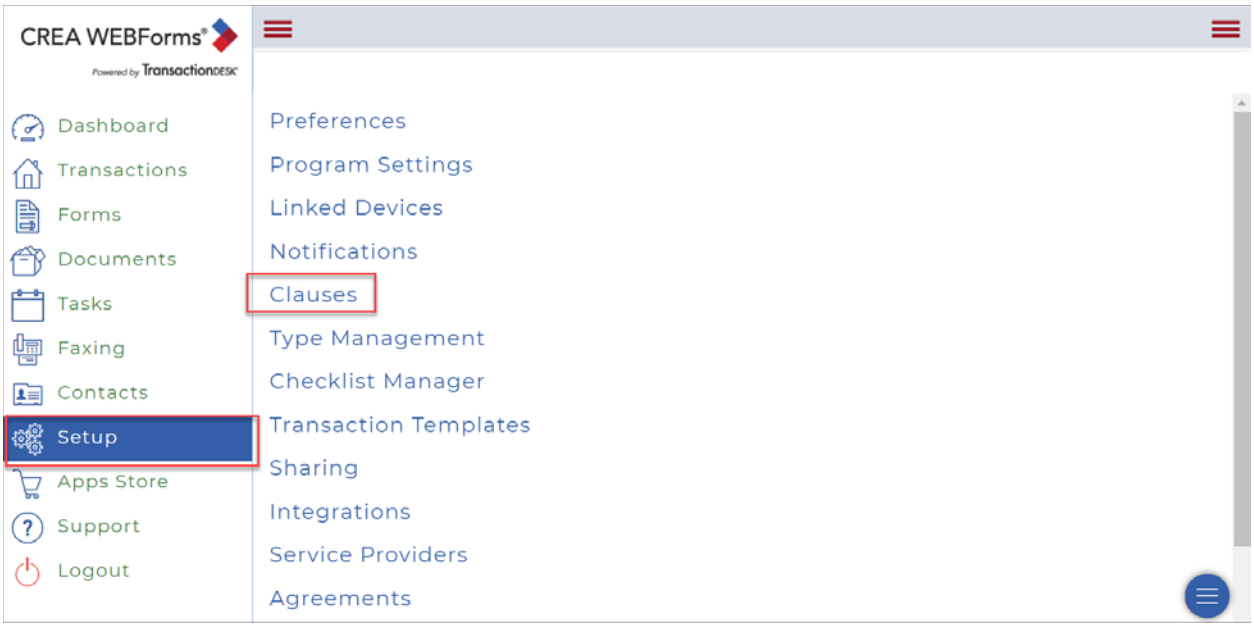
You can create standard personal clauses, specific to your needs, which can be reused in multiple documents. You can create clauses for your own personal use, or for the other salespeople in the office to use. You can enter in your own original text, or cut-and-paste text from your documents.

You can organize the clauses you create into folders, so they are easy to locate.

To create a personal clause:

1. Click **Setup** in the **Sidebar.**

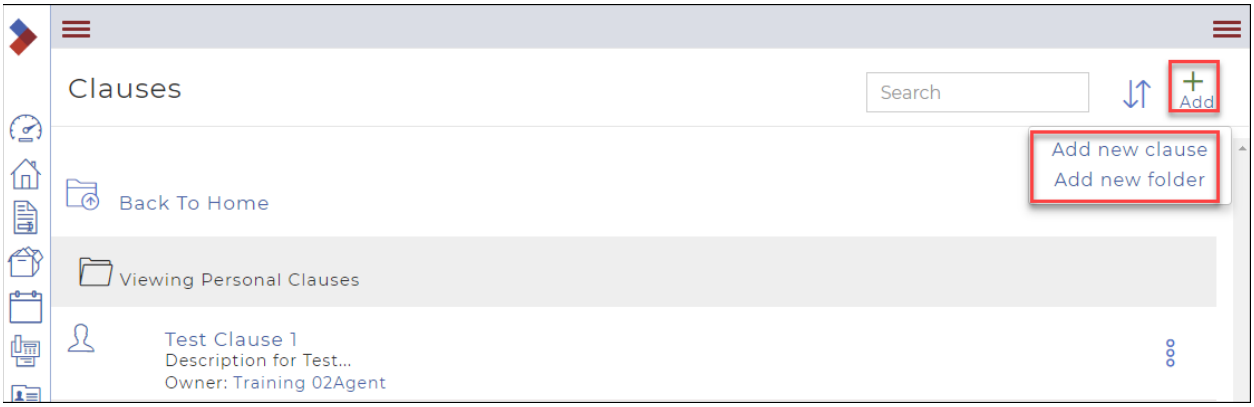
The **Setup** window displays.



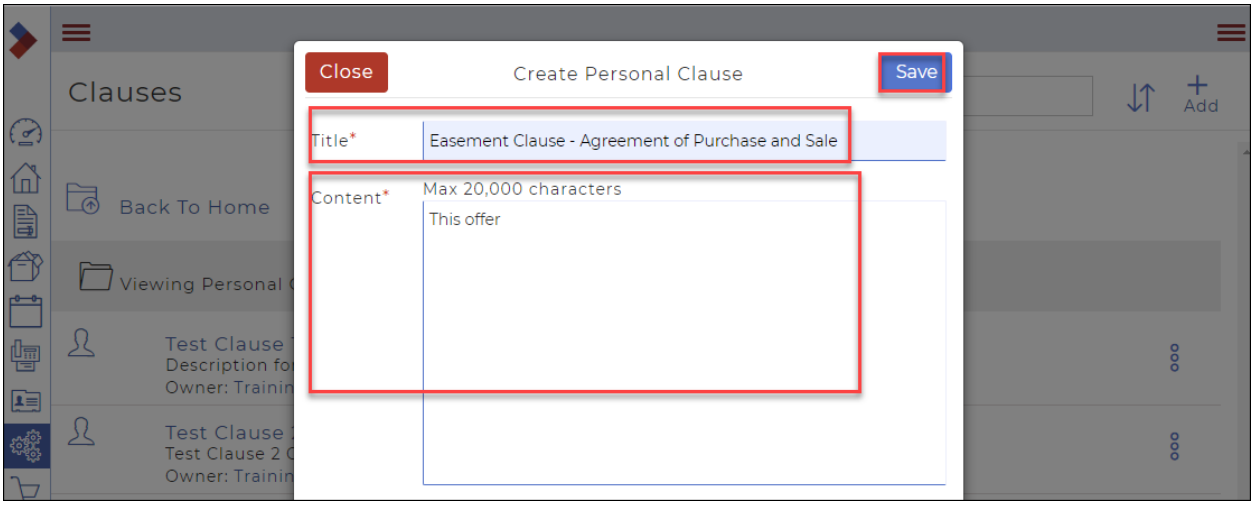
2. Click **Clauses**.
   The **Clauses** window displays three categories of clauses.

3. Click **Personal Clauses** to view your personal clauses. You can also create an **Office Clause** in the same way.
   The **Personal Clauses** folder displays.

4. Click **Add**.
   You are given the choice of adding a new clause or adding a new folder.



5. Click **Add new clause**.
   The **Create Personal Clause** dialog box displays.



6. Add a unique, meaningful **Title** (required field).
7. In the **Content** field (required field) enter your data, by typing or pasting from another document.
8. When you are satisfied that your clause is complete, click **Save**.

Your clause has been added.
See **Previewing and editing a clause** for information on how to edit the clause.

Creating a clause folder

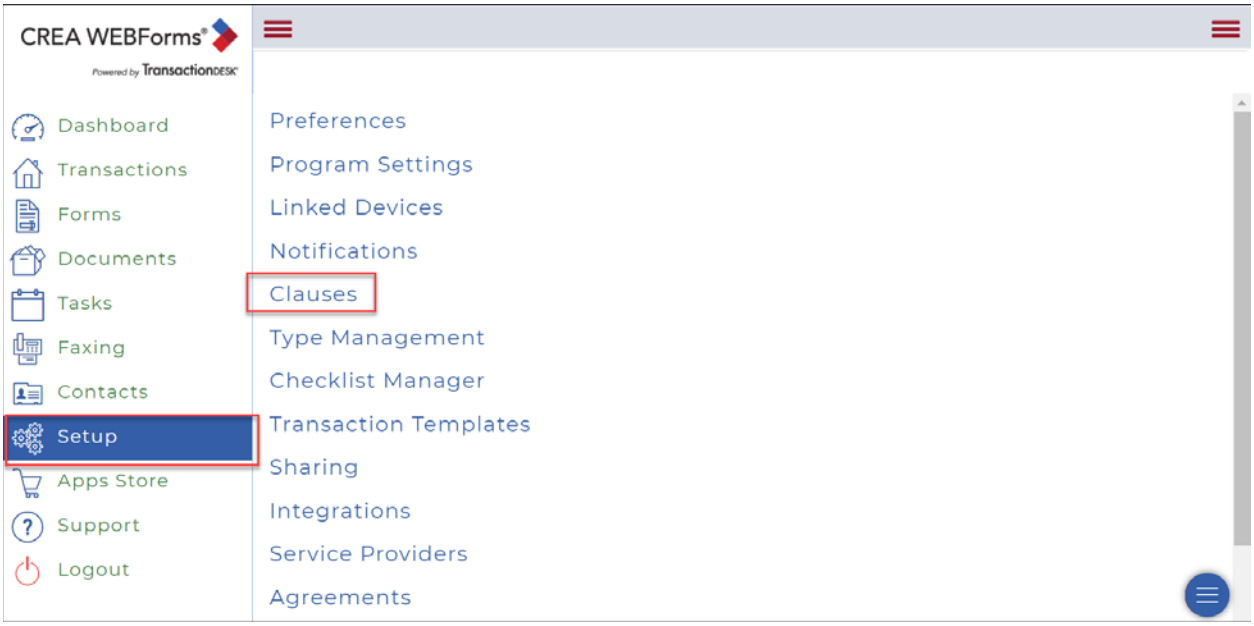
You can organize the clauses you create into folders, so they are easy to locate.

CLICK TO VIEW VIDEO

To create a clause folder:

1. Click **Setup** in the **Sidebar.**

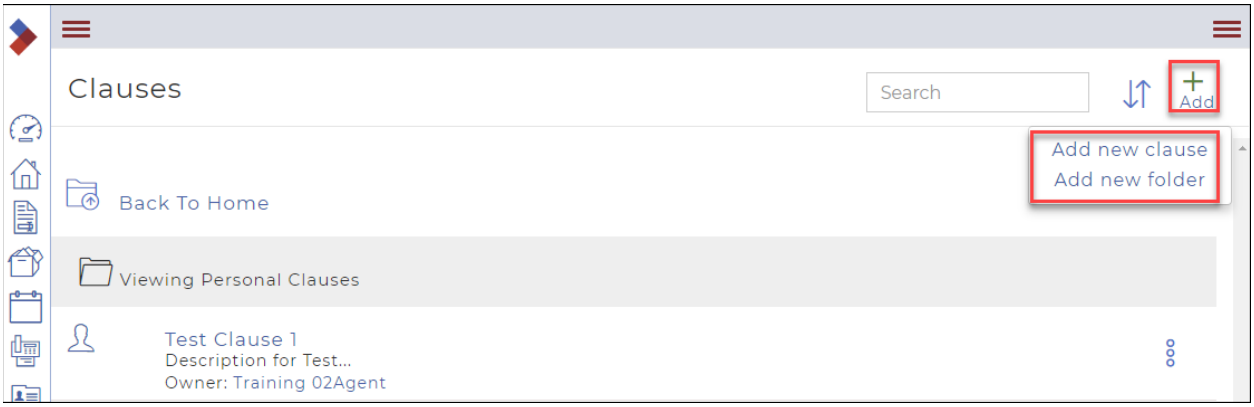
The **Setup** window displays.



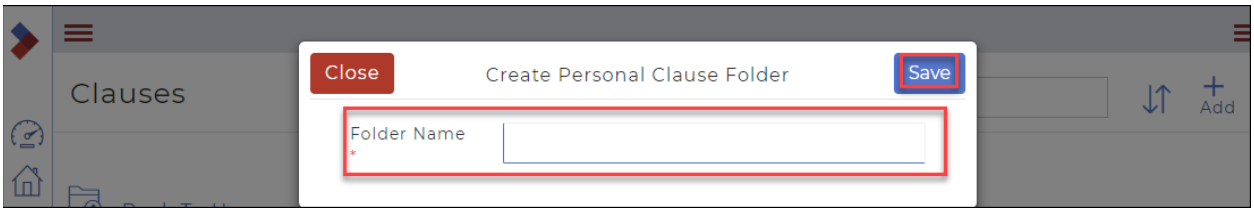
2. Click **Clauses**.
   The **Clauses** window displays three categories of clauses.

3. Click **Personal Clauses** to view your personal clauses.
   The **Personal Clauses** folder displays.

4. Click **Add**.
   You are given the choice of adding a new clause or adding a new folder.



5. Click **Add new folder**.
   The **Create Personal Clause Folder** dialog box displays.



6. Add a meaningful **Folder Name** (required field).
7. Click **Save**.
   Your clause folder has been added.

Previewing and editing a clause

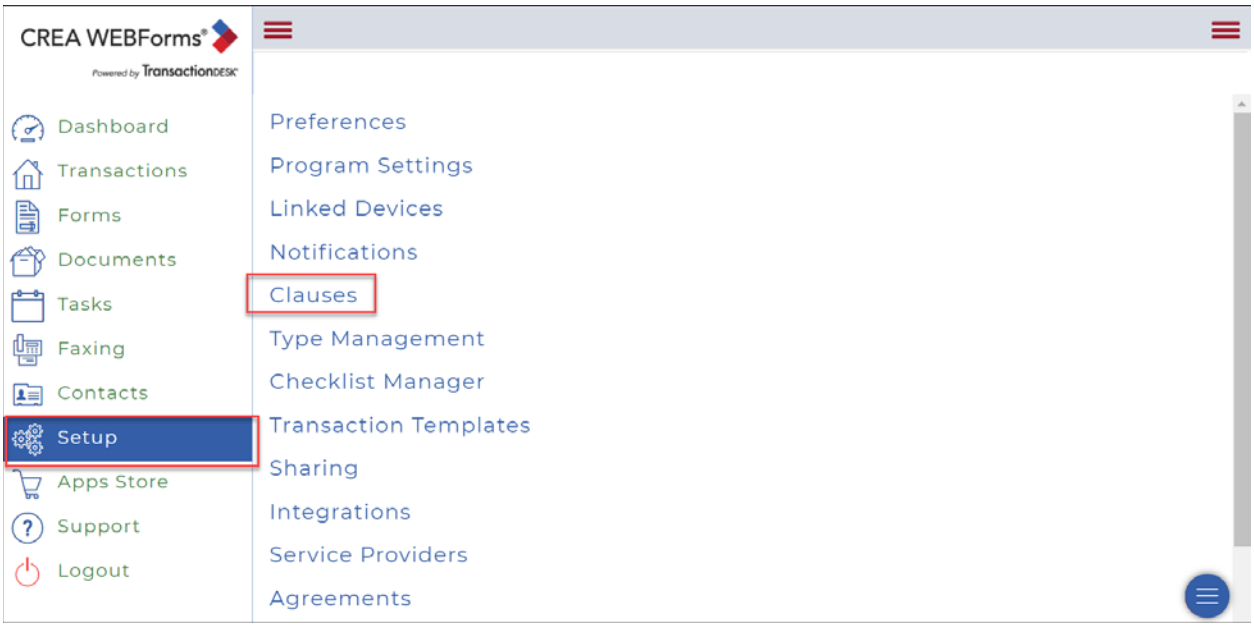
CLICK TO VIEW VIDEO

CLICK TO VIEW VIDEO

To preview or edit a clause:

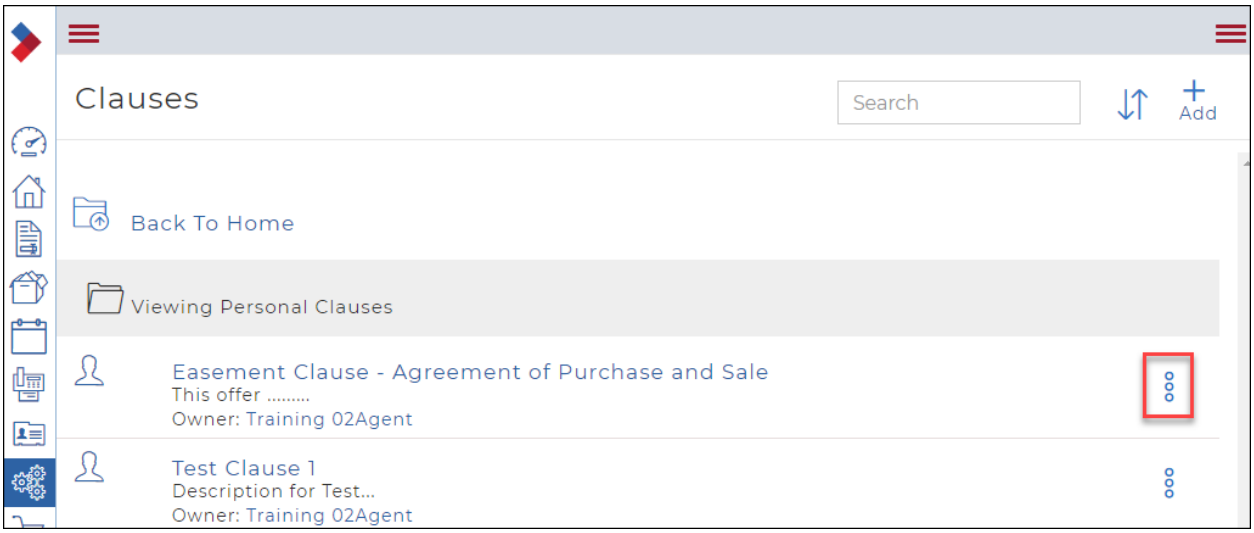
1. Click **Setup** in the **Sidebar.**

The **Setup** window displays.

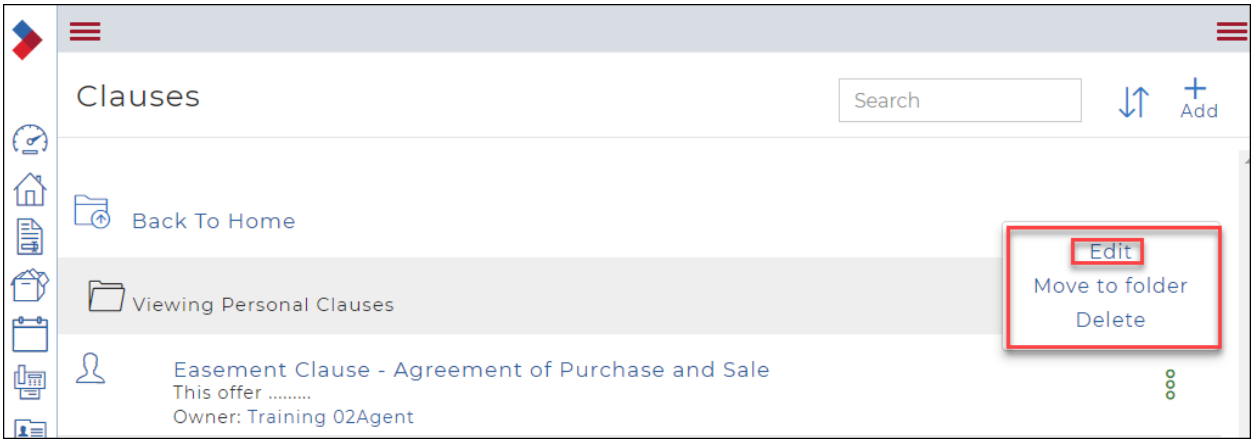


2. Click **Clauses**.
   The **Clauses** window displays three categories of clauses.

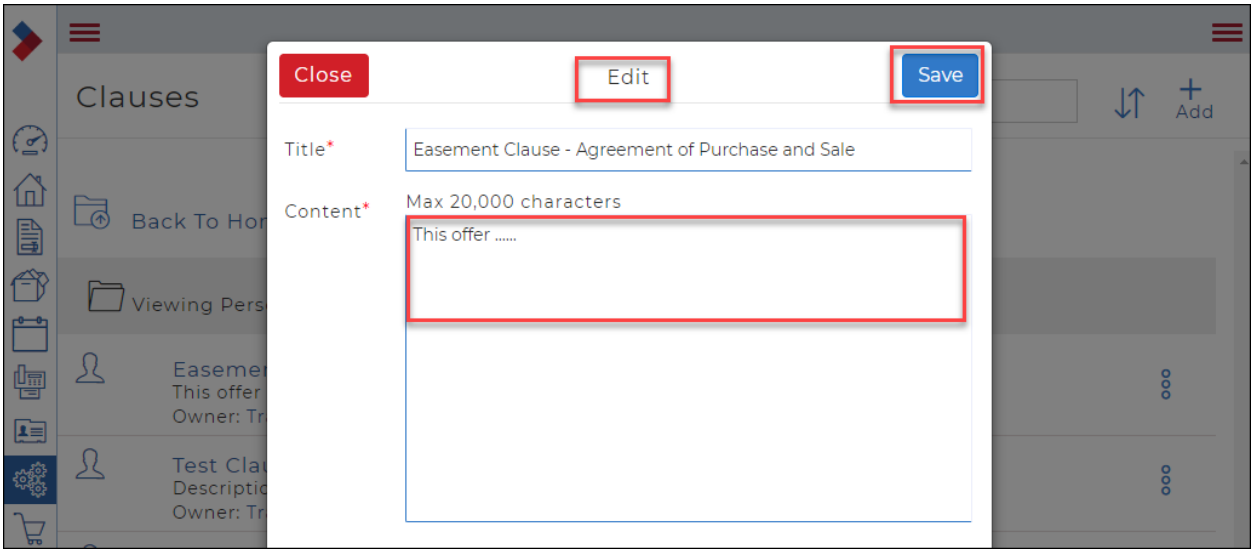
3. Click **Personal Clauses** to view your personal clauses.
   The **Personal Clauses** folder displays.



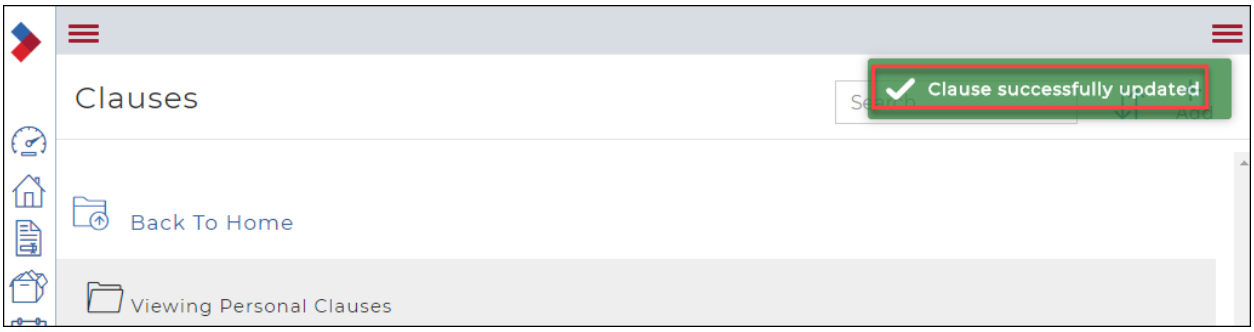
4. Click the **Ellipses Menu** ⋮.
   A dropdown menu displays options.



5. Click **Edit**.
   The **Edit** dialog box displays.



6. Make your edits.
7. Click **Save**.
   A confirmation message that your clause was successfully updated will display in the top right corner.



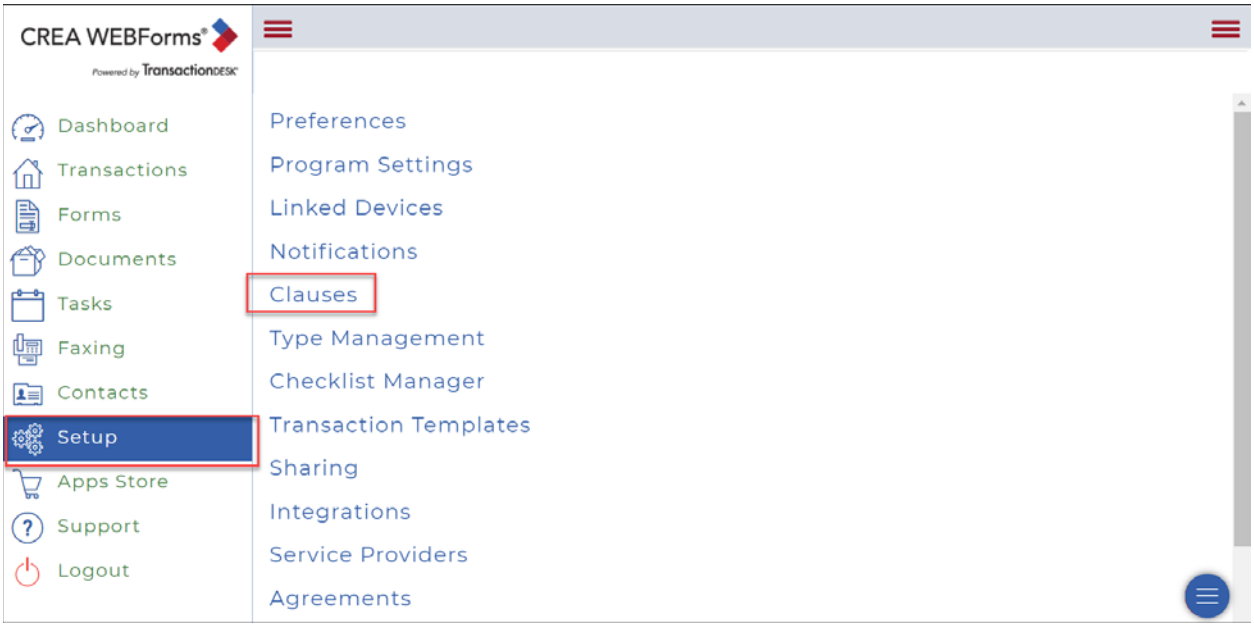
Moving a clause

CLICK TO VIEW VIDEO

To move a clause:

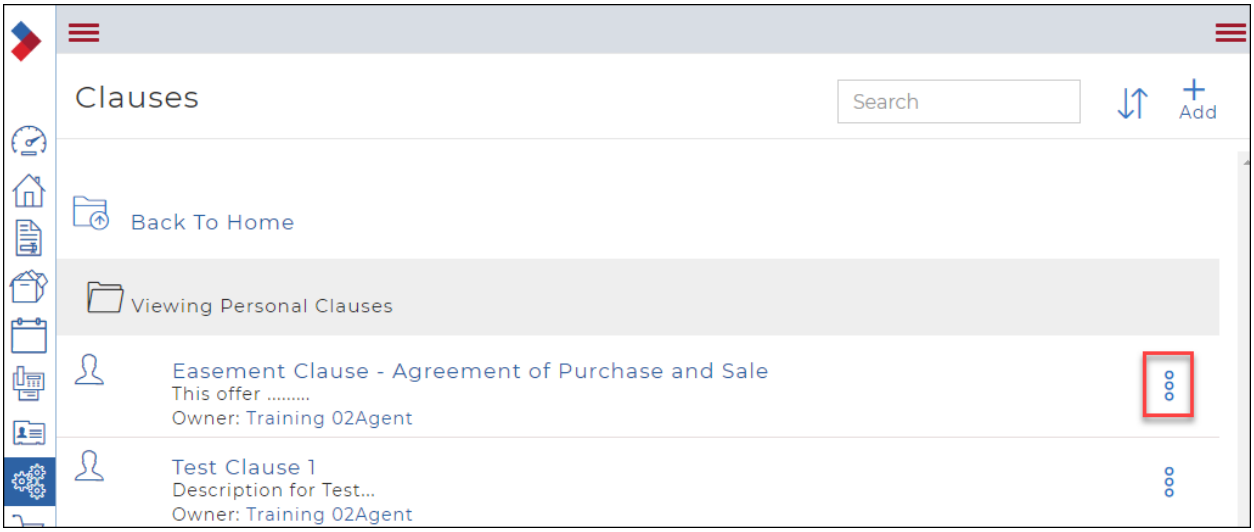
1. Click **Setup** in the **Sidebar.**

The **Setup** window displays.

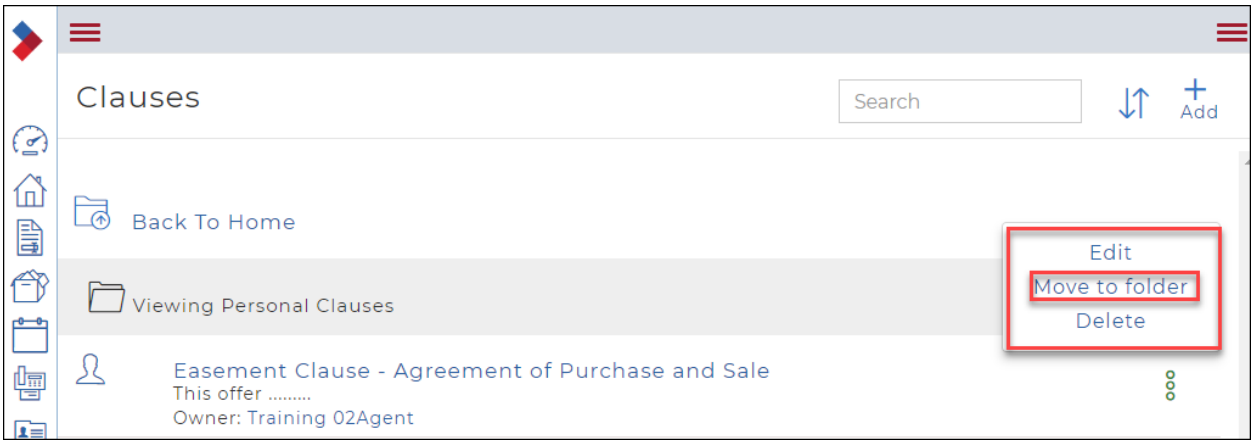


2. Click **Clauses**.
   The **Clauses** window displays three categories of clauses.

3. Click **Personal Clauses** to view your personal clauses.
   The **Personal Clauses** folder displays.

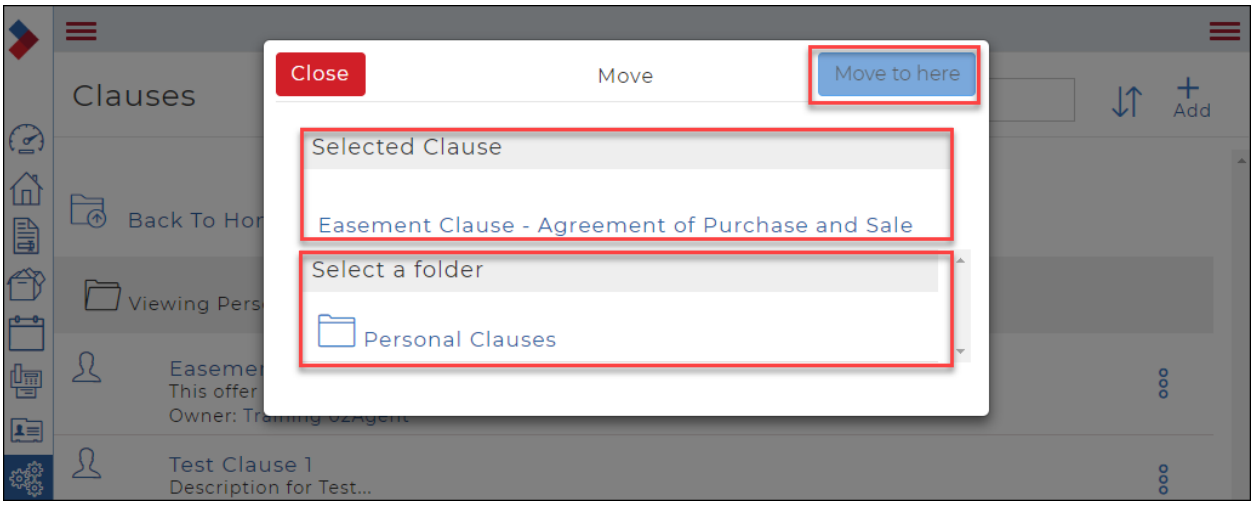


4. Click the **Ellipses Menu** ⋮ **.**
   A dropdown menu displays options.

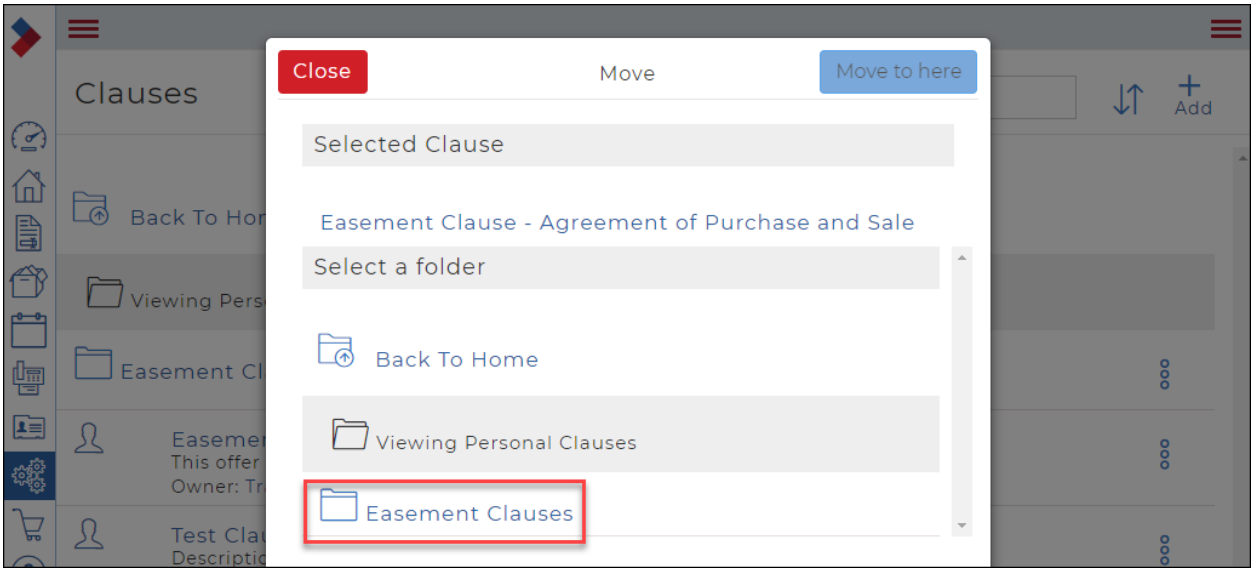


5. Click **Move to folder**.

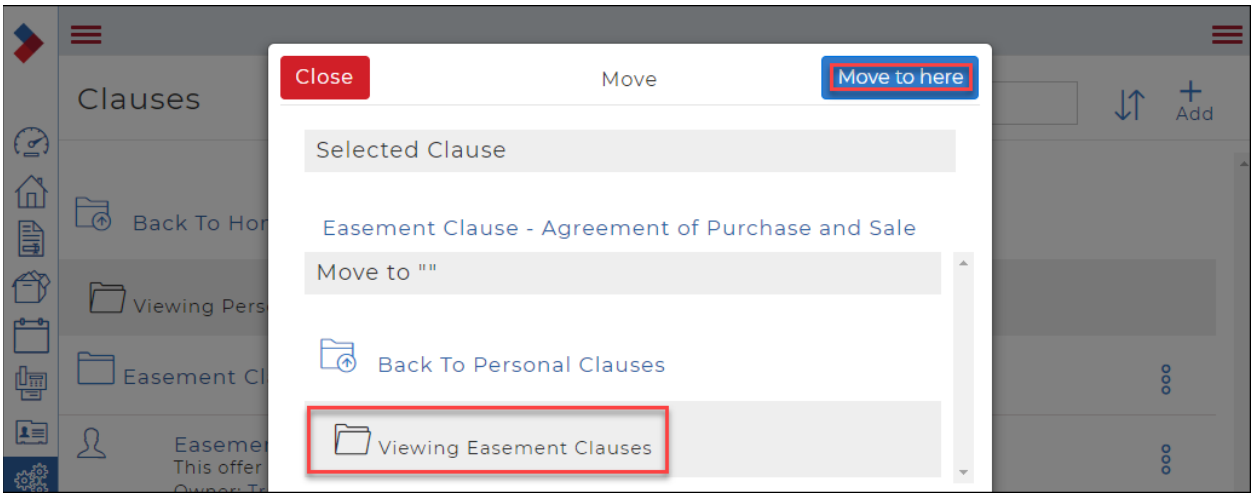
The **Move** dialog box displays the Selected Clause. You can edit the clause at this point by clicking the clause name.



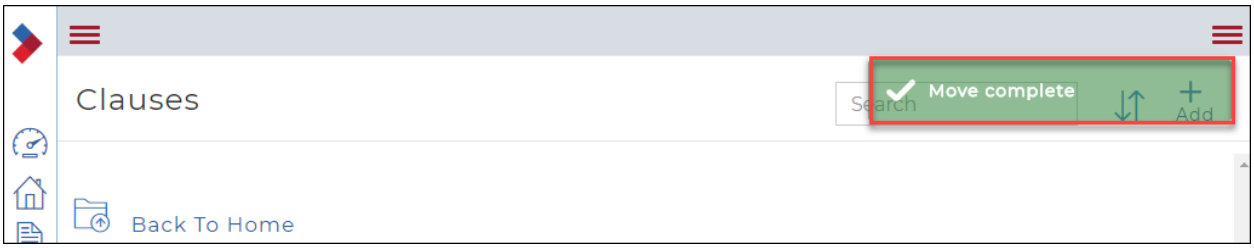
6. Click the name of the top-level folder that contains the folder to which you want to move the clause. The subfolders will display.



7. Click the name of the folder to which you want to move the clause.
The selected folder will display in the dialog box.



8. Click **Move to here** once you have selected the folder.
   A confirmation message that your move is complete will display in the top right corner.



Deleting a personal clause

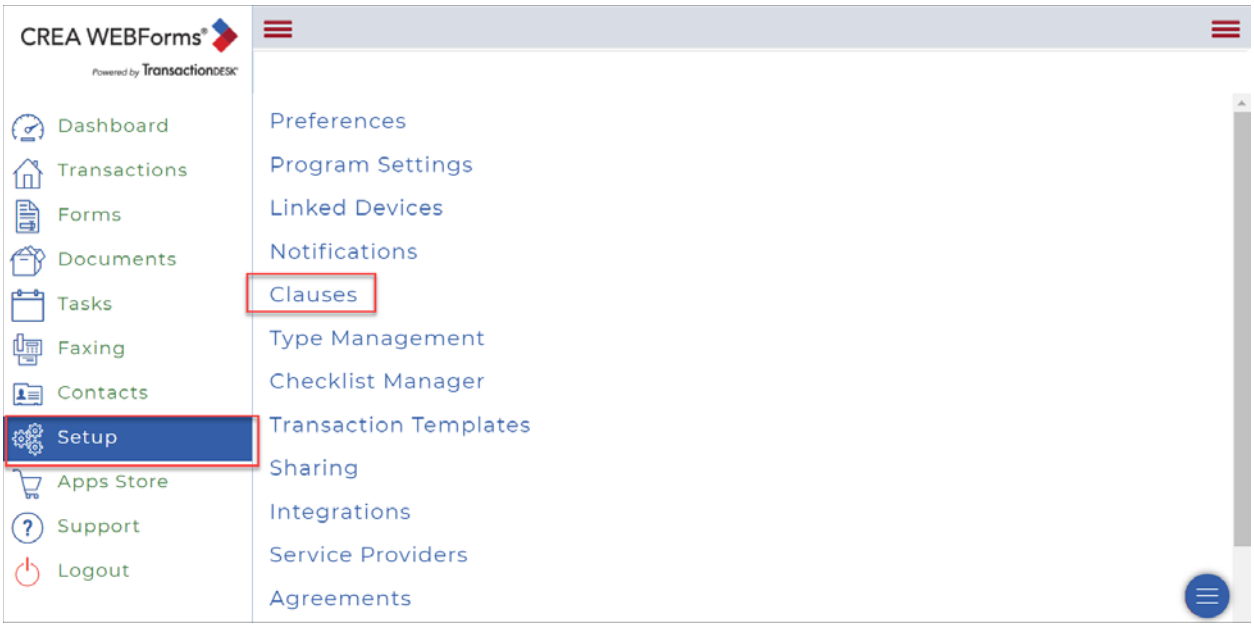
CLICK TO VIEW VIDEO

CLICK TO VIEW VIDEO

To delete a personal clause:

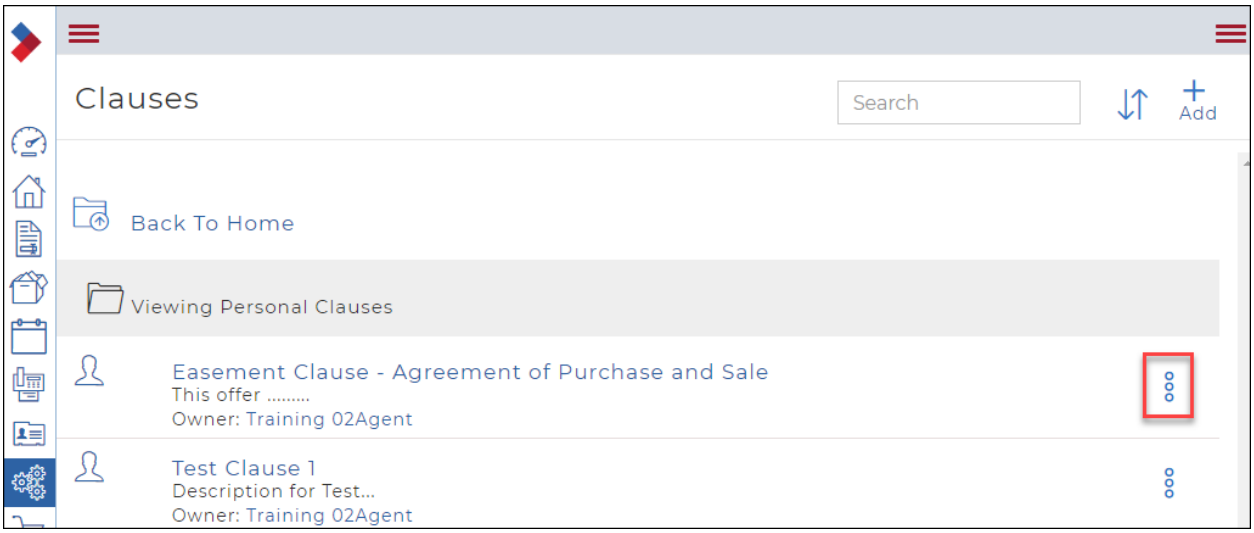
1. Click **Setup** in the **Sidebar.**

The **Setup** window displays.

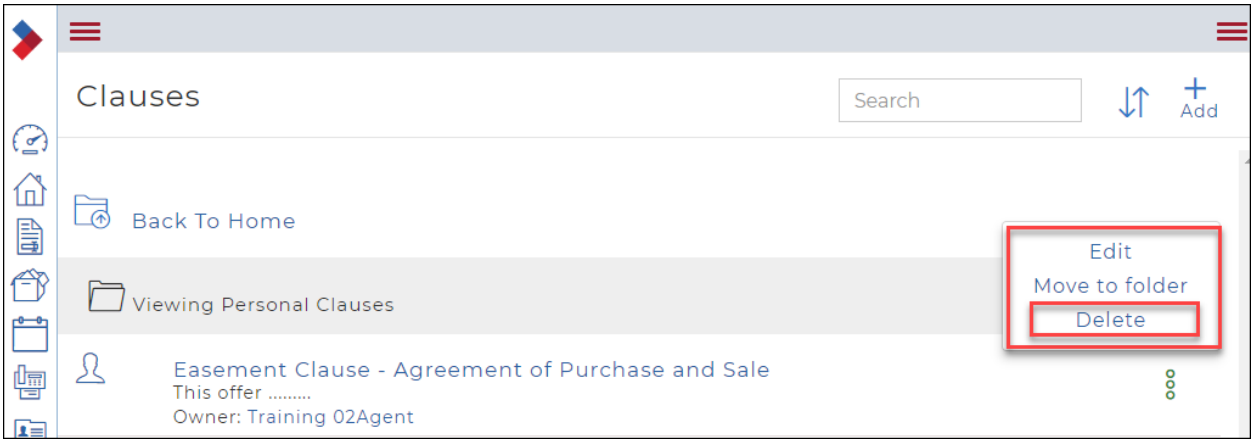


2. Click **Clauses**.
   The **Clauses** window displays three categories of clauses.

3. Click **Personal Clauses** to view your personal clauses.
   The **Personal Clauses** folder displays.

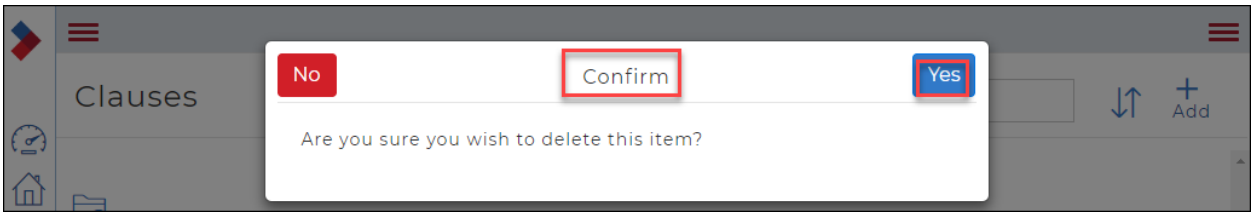


4. Click the **Ellipses Menu** ⋮ **.**
   A dropdown menu displays options.

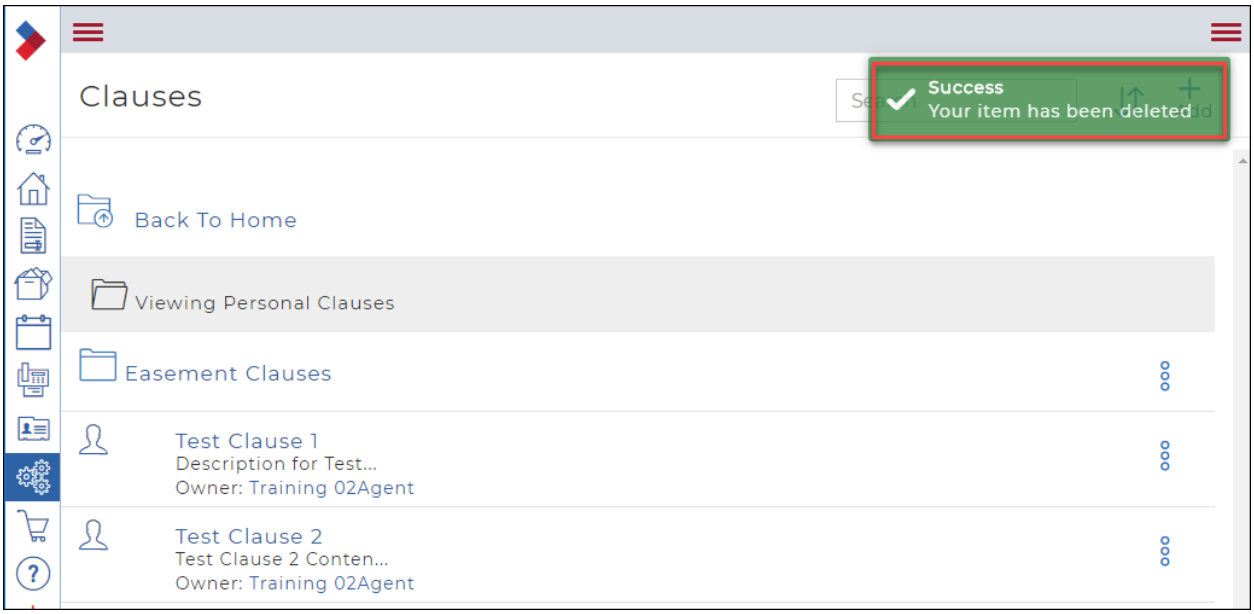


5. Click **Delete**.
   A **Confirm** dialog box displays, asking if you are sure you wish to delete this item.

   Caution: Deleting a clause is permanent; the clause cannot be restored once deleted.



6. Click **Yes**.
   A confirmation message that your move is complete will display in the top right corner.



Inserting a clause into a form

See Inserting a clause into a form in the Forms section.

Working with Contacts

A contact can be any company or individual other than a user of the system, whose information is stored and accessed in the system. Examples of contacts include buyers, sellers, outside brokers and referrals, mortgage companies, trust/escrow companies, and lawyers.

Types of contacts

There are two main types of contacts in the system: general and transaction contacts.

General contacts profiles are stored in **Contacts** and are not typically associated with a particular transaction. For example, an agent might store the contact information for a staging company that they frequently use in the system, ensuring that their contact information is always at hand when they need it.

Transaction contacts are associated with a particular transaction in the system. A transaction contact can begin as a general contact, but the reverse is not necessarily true, unless the user specifies that the transaction contact should be added to the address book when a profile is created or updated.

Sources of Contacts

Contacts have three points of origin in the system:

1. They are manually created in Contacts as a general contact.

2. They are manually created in a transaction as a transaction contact.

3. They are imported as either a general or transaction contact from your Google account contacts.

Purpose of Contacts

Use contacts to quickly populate information related to your transactions, such as buyer and seller names, addresses, phone numbers, and email addresses. You enter the information about a contact once in the system, and then reuse the contact profile as you add the contact to transactions and signings. Creating contact profiles helps to save time and effort.

You can also use contacts to create an address book of frequently needed contacts in the system. The advantage of having an online address book is that your contacts are always at hand, if you possess a mobile device and a viable internet connection. In addition, you can email any of your contacts from within the system without having to navigate externally to your email client and look them up again.

This section includes:

Creating a contact

Creating a contact in a transaction

Editing a contact

Editing a contact in a transaction

Deleting a contact

Emailing a contact

Emailing a contact from a transaction

Importing contacts from a Gmail accounts

Importing a contact to a transaction from a Gmail account

Exporting contacts to a spreadsheet

Searching for a contact

Creating a contact

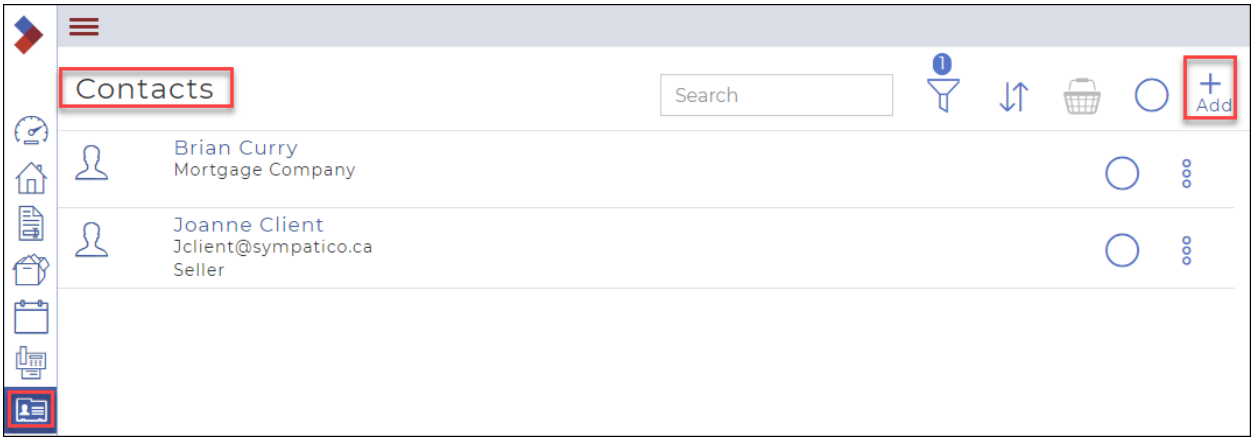
Add contacts in the system so that you have a reference as to who is involved in a particular transaction, and to quickly populate your transaction forms, avoiding repeat data entry.

Anyone can be a contact. For example: a buyer, seller, trust company, salesperson, or even you can be a contact.

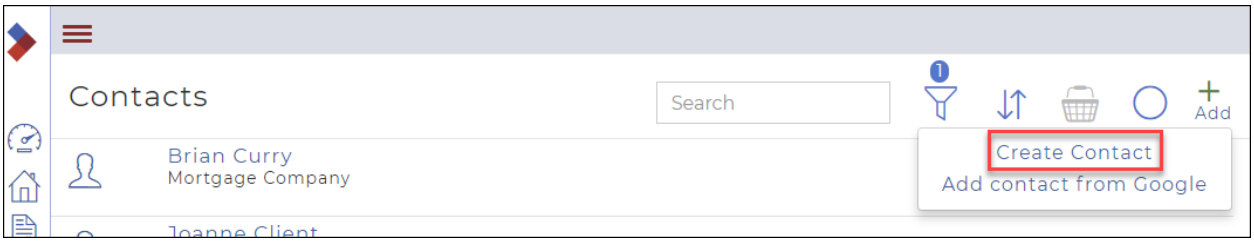
You can add contacts as needed to your address book for use on any transaction, or directly into the list of contacts associated with a particular transaction.

To create a contact:

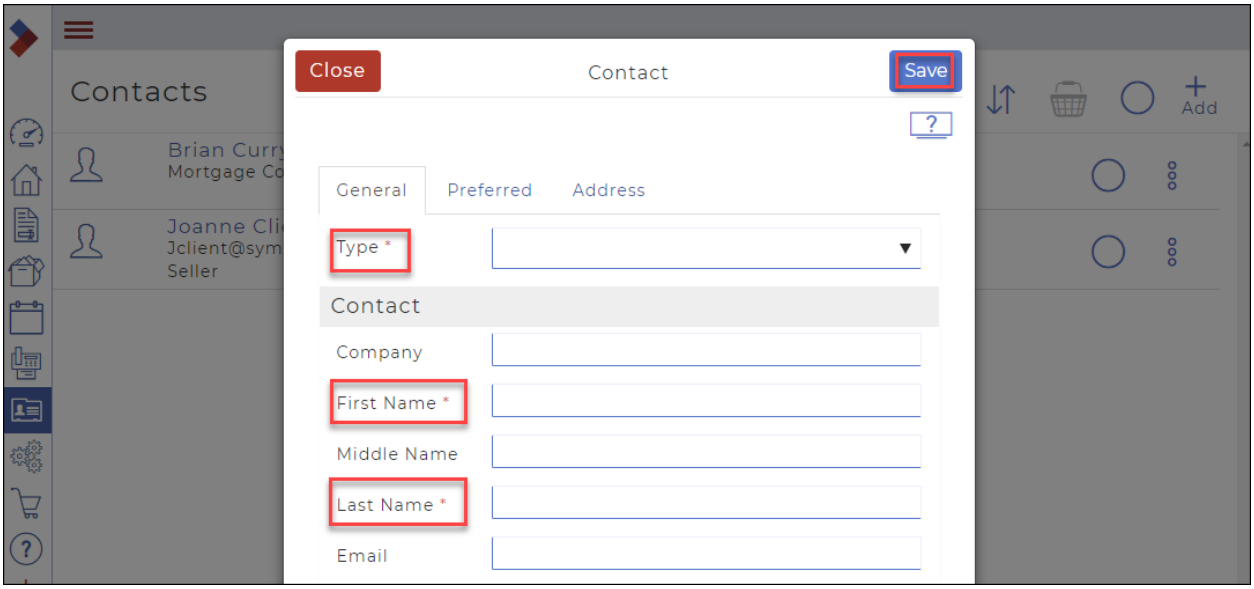
1. In the Sidebar, click **Contacts** .
   The **Contacts** window displays.



2. Click **Add**.
   A dropdown displays some actions.



3. Click **Create Contact**.
   The **Contact** dialog box displays.



Note: Required fields are indicated by an asterisk.*

4. Use the **Type** dropdown to select the type of contact, such as a buyer, seller, or title company.
5. In the **Contact** section, type information about the contact in the available fields, such as their name and email.
   - Required fields: **First Name, Last Name**
6. Optional: Use the **Preferred** tab to enter information about the contact if you intend to involve them in a signing, and you need the information that displays on a document or form to be different from the information in the General tab.
   - In the Preferred section, in the Preferred Name field, type the name of the contact as the contact needs it to display on a document or form.
   - Type the name of the contact as the contact needs it to display in their signature on a document or form in the Preferred Signature field.
   - Type the initials of the contact as the contact needs them to display on a document or form in the Preferred Initials field.
7. Optional: Use the **Address** tab fields to include additional information about the contact, such as their address, city, state, postal code and phone number.

   Note: The information in this tab is used to autopopulate forms where applicable, so it is useful to obtain it from your contacts.

8. When you are finished adding information to your contact, click **Save**.

   The contact is saved and added to the list of contacts.

Creating a contact in a transaction

Add contacts in the system so that you have a reference as to who is involved in a particular transaction, and to quickly populate your transaction forms, avoiding repeat data entry.

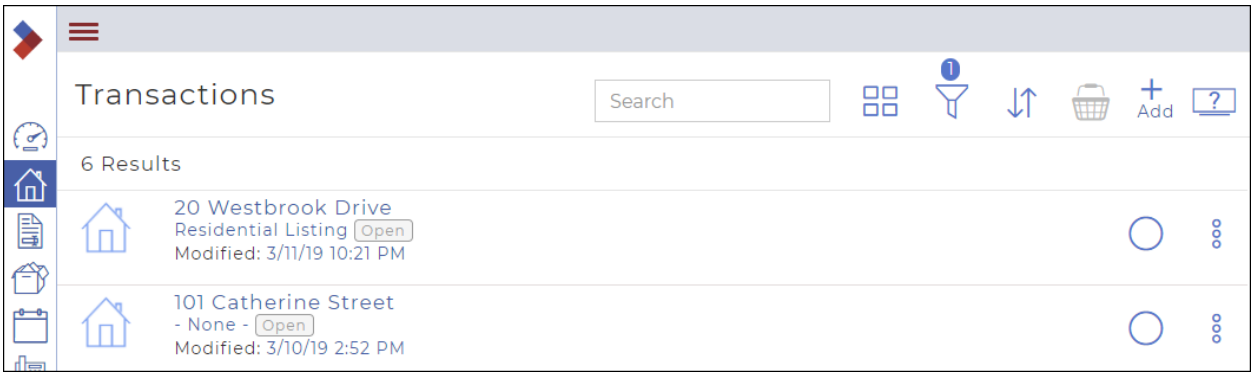
Anyone can be a contact. For example: a buyer, seller, trust company, salesperson, or even you can be a contact.

You can add contacts as needed to your address book for use on any transaction, or directly into the list of contacts associated with a particular transaction.

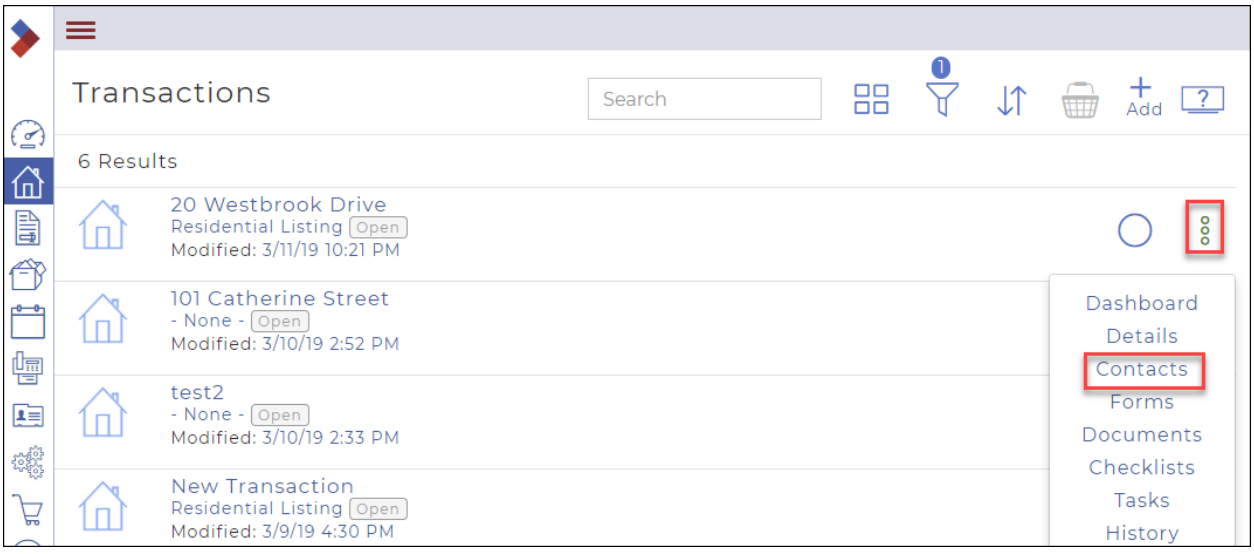
CLICK TO VIEW VIDEO

To create a contact in a transaction:

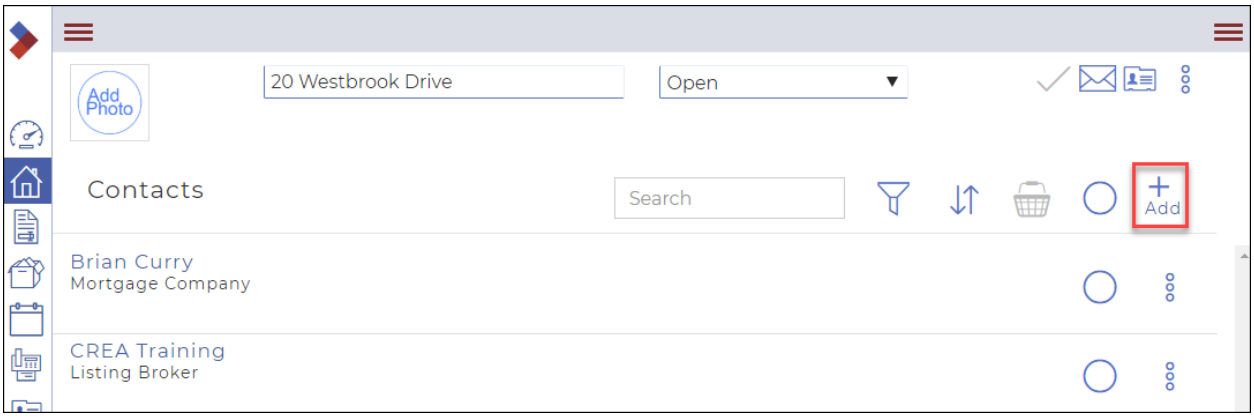
1. In the Sidebar, click **Transaction** .
   The **Transactions** list displays.



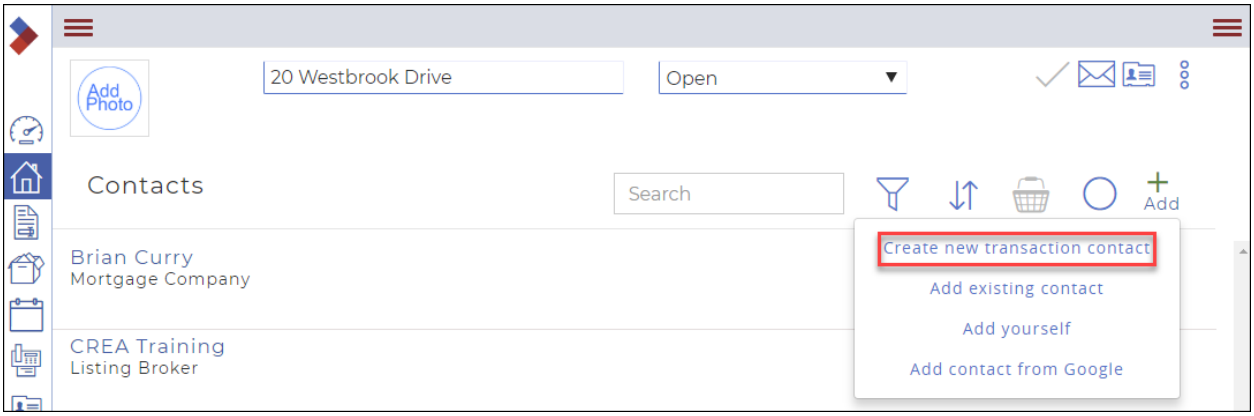
2. Location the transaction you need to add the contact to, then click the **Ellipses Menu** to display the dropdown menu.



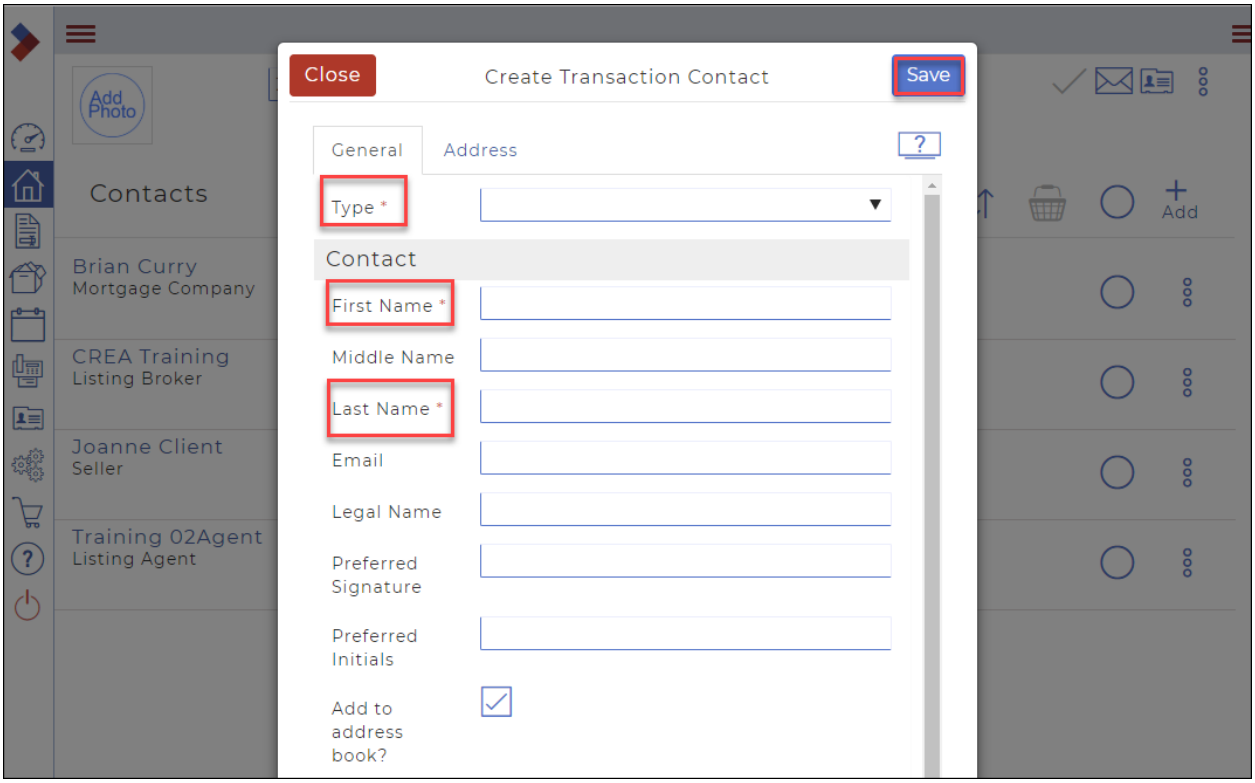
3. Click **Contacts**.
   The **Contacts** dialog box displays.



4. Click **Add**.
   A dropdown menu displays.

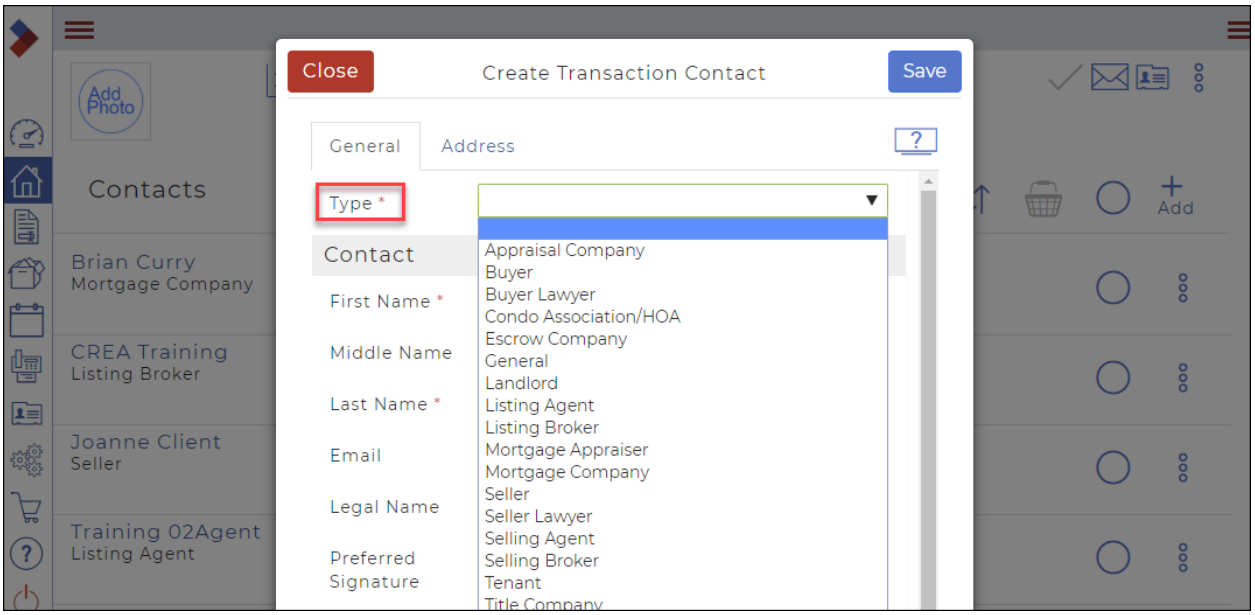


5. **Click Create new transaction contact**.
   The **Create transaction contact** opens on the General tab.



Note: Required fields are indicated with an asterisk.*

6. Use the **Type** dropdown to select the type of contact, such as a buyer, seller, or title company.



7. In the **Contact** section, type information about the contact in the available fields, such as their name and email.
   - Required fields: **First Name**, Last **Name**
   - Optional: enter an email address in the **Email** field.

- Optional: In the **Legal Name** field, type the name of the contact as the contact needs it to display on a document or form, if it differs from the **First**, **Middle**, and **Last** name fields.
- Optional: Type the name of the contact as the contact needs it to display in their signature on a document or form in the **Preferred Signature** field, if it differs from the **First**, **Middle**, and **Last** name fields.
- Optional: Type the initials of the contact as the contact needs them to display on a document or form in the Preferred Initials field, if their initials differ from the First, Middle, and Last name fields.
- Optional: Check Add to address book if you need to add this contact to your list of contacts.

*Note: If you do not check **Add to address book**, the contact profile exists only on this transaction, and cannot be reused.*

8. **Address** tab
   Optional: Use the **Address** tab fields to include additional information about the contact, such as their address, city, state, postal code and phone number.

   Note: The information in this tab is used to autopopulate forms where applicable, so it is useful to obtain it from your contacts.

9. Where applicable: Use the **Identifiers** tab to type information about an agent's identification number or license number.
10. Where applicable: Use the **Mortgage** tab to add any information about any mortgages related to this contact on this transaction.
11. When you are finished adding information to your contact, click **Save**.

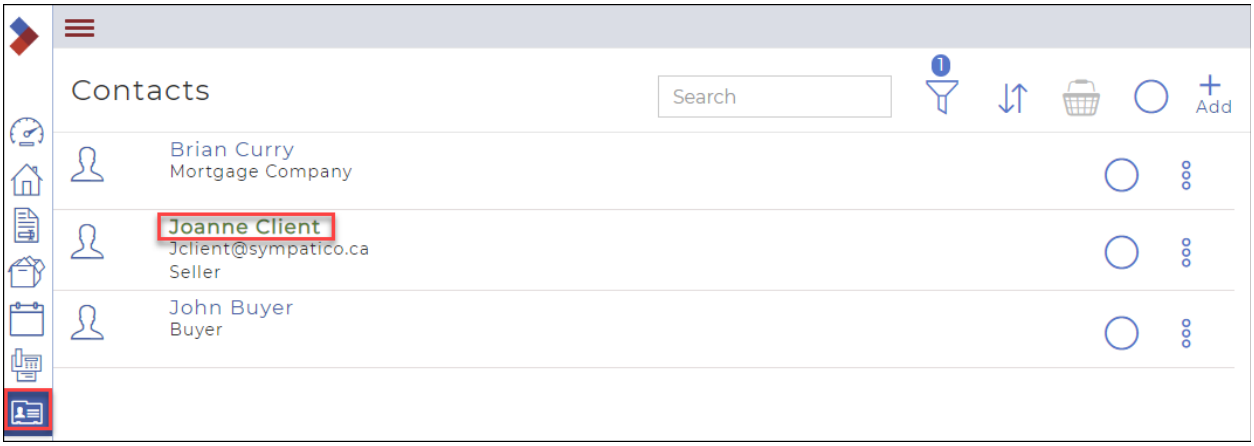
    The contact is saved and added to the list of contacts for this transaction.

Editing a contact

Edit a contact's profile at any time. For example, if your contact's phone number or email address are updated, you can edit the contact's profile to reflect those changes.

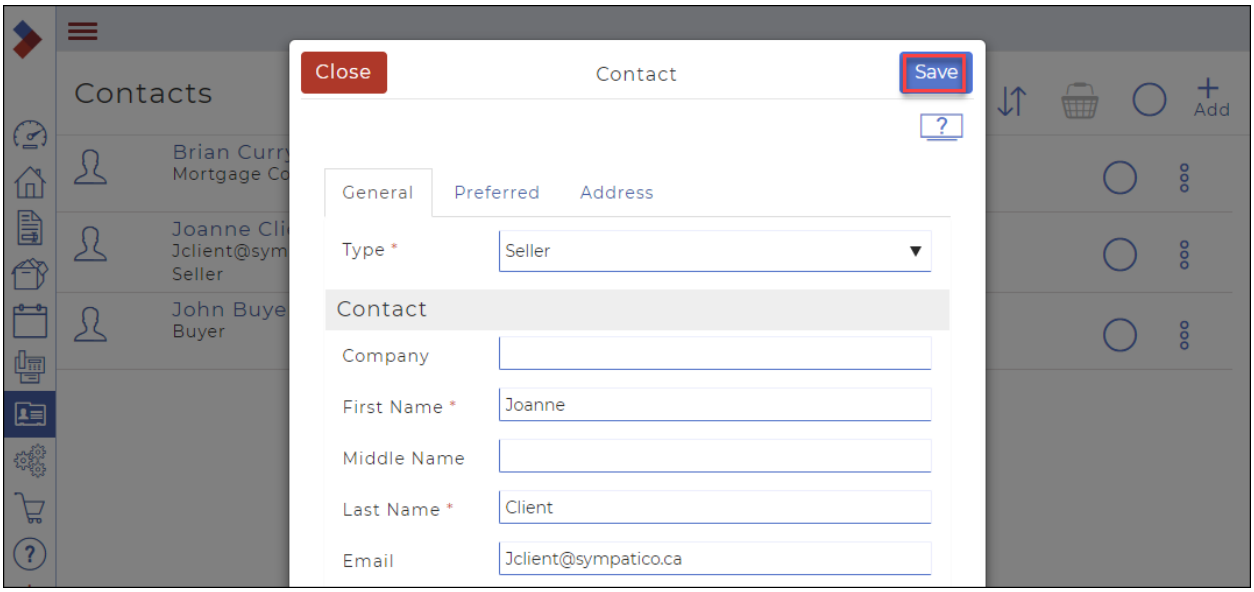
To edit a contact:

1. In the Sidebar, click **Contacts** .
   The **Contacts** window displays.



2. Click the name of the contact you need to edit.

The **Contact** dialog box opens, on the General tab.



3. Make any updates to the profile that you need to make.
4. Click **Save**.
   The updates to the contact profile are saved.

   Note: Updating a contact profile does not automatically update all forms that the contact's information is already added to.

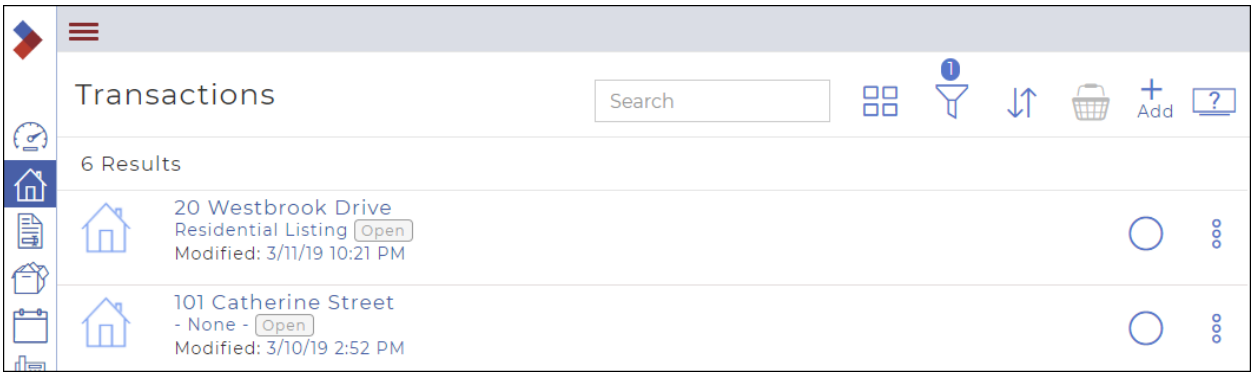
CLICK TO VIEW VIDEO

Editing a contact in a transaction

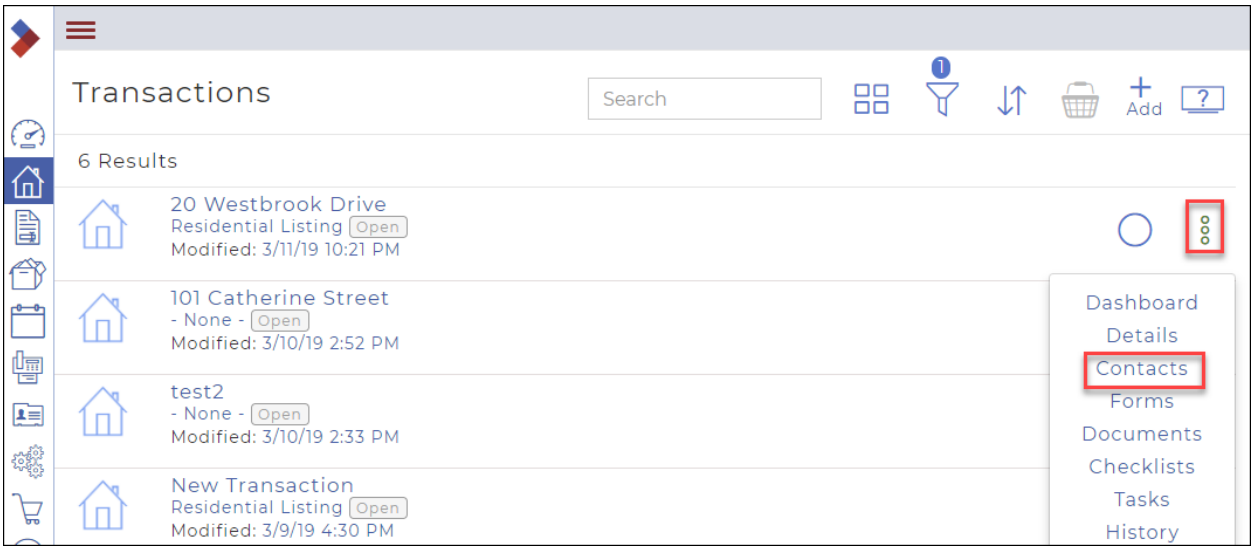
Edit a contact's profile at any time. For example, if your contact's phone number or email address are updated, you can edit the contact's profile to reflect those changes.

To edit a contact in a transaction:

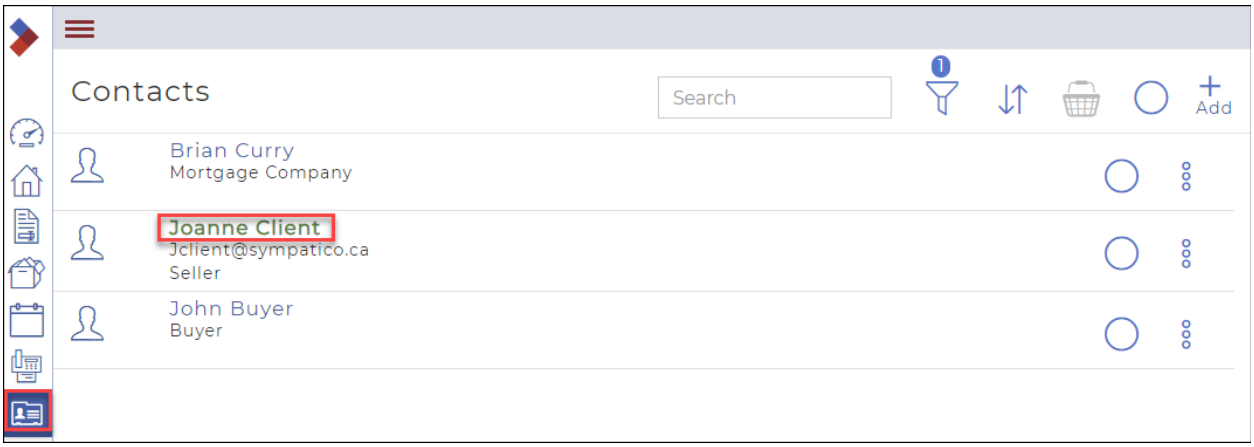
1. In the Sidebar, click **Transaction**.
   The **Transactions** list displays.



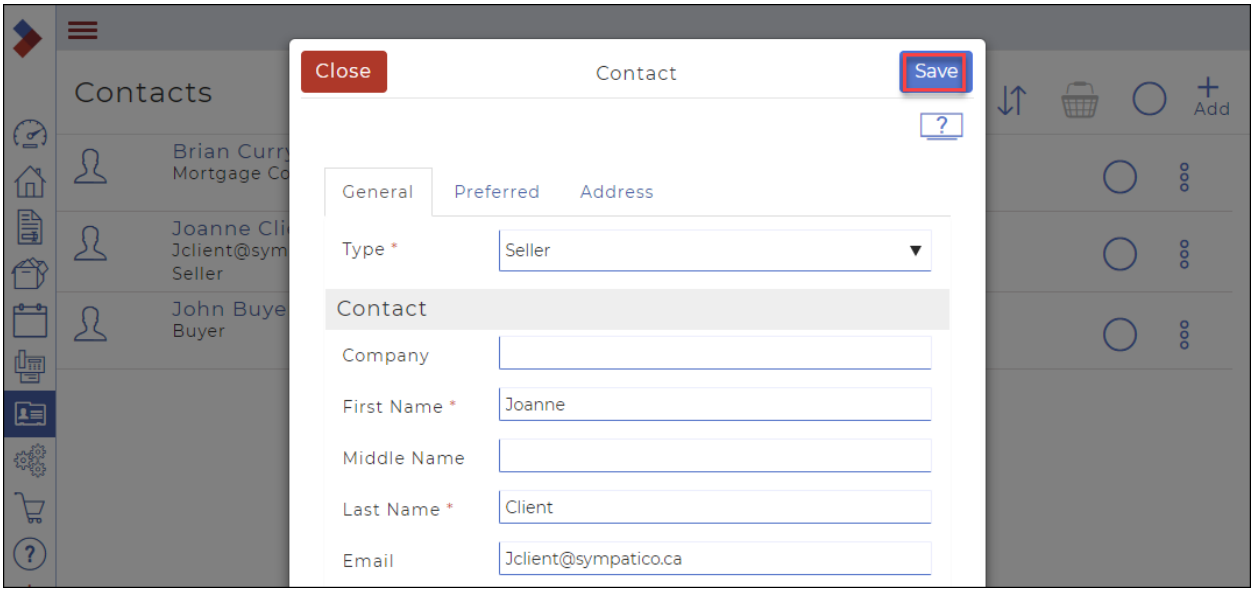
2. Locate the transaction containing the contact you need to edit, then click the **Ellipses Menu** to display the dropdown menu.



3. Click **Contacts**.



4. Click the name of the contact you need to edit.
   The **Contact** dialog box opens, on the General tab.



5. Make any updates to the profile that you need to make.
6. Click **Save**.
   The updates to the contact profile are saved.

   Note: Updating a contact profile does not automatically update all forms that the contact's information is already added to.

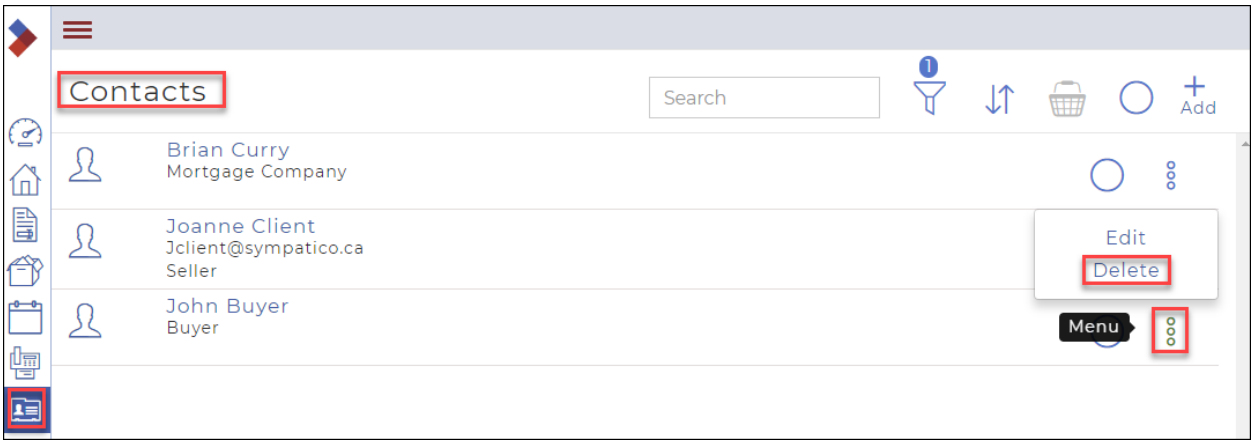
Deleting a contact

Delete a contact when you are certain you are not working with them again, or no longer need to add them to your transactions. For example: delete a contact if they are retired from the real estate industry or have passed away. Deleting contacts that you are not actively using helps to keep your list of contacts manageable and functional.

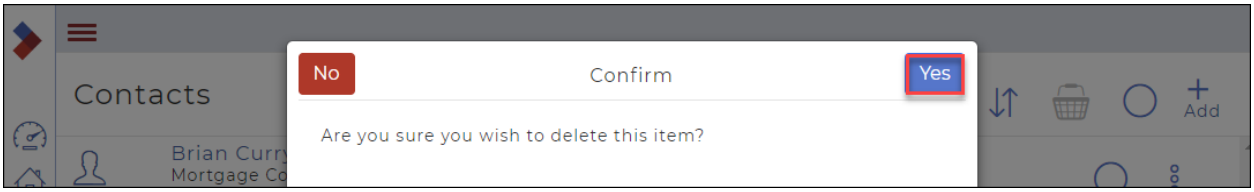
Note: Deleting a contact does not remove them from any transactions or forms to which they are already added.

To delete a single contact:

1. In the Sidebar, click **Contacts**.
   The **Contacts** window displays.
2. Click the **Ellipses Menu** beside the contact that you need to delete.
   A dropdown menu displays.



3. Click **Delete**.
   The Confirm dialog box displays.



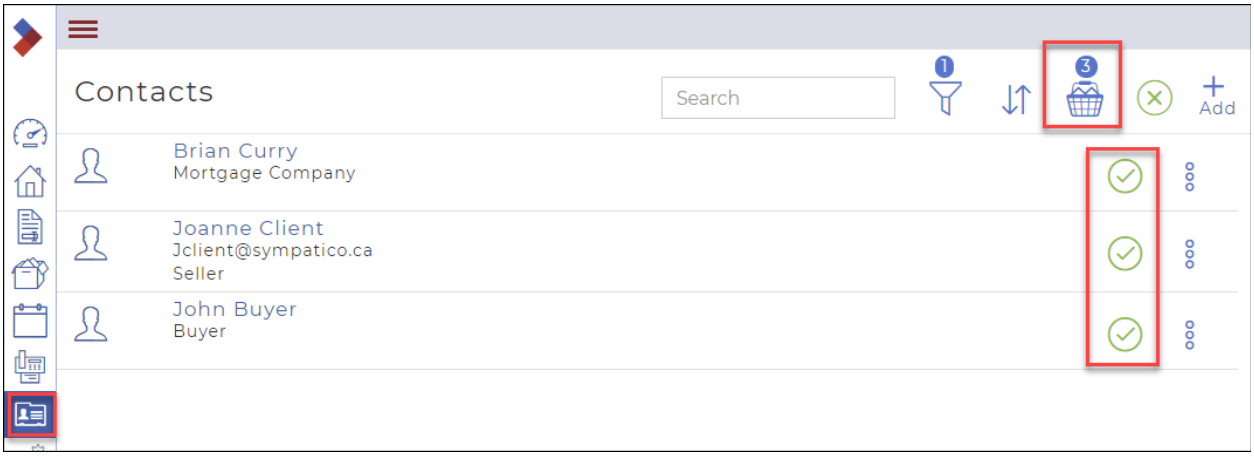
4. Click **Yes**.
   The contact is deleted.

To delete multiple contacts:

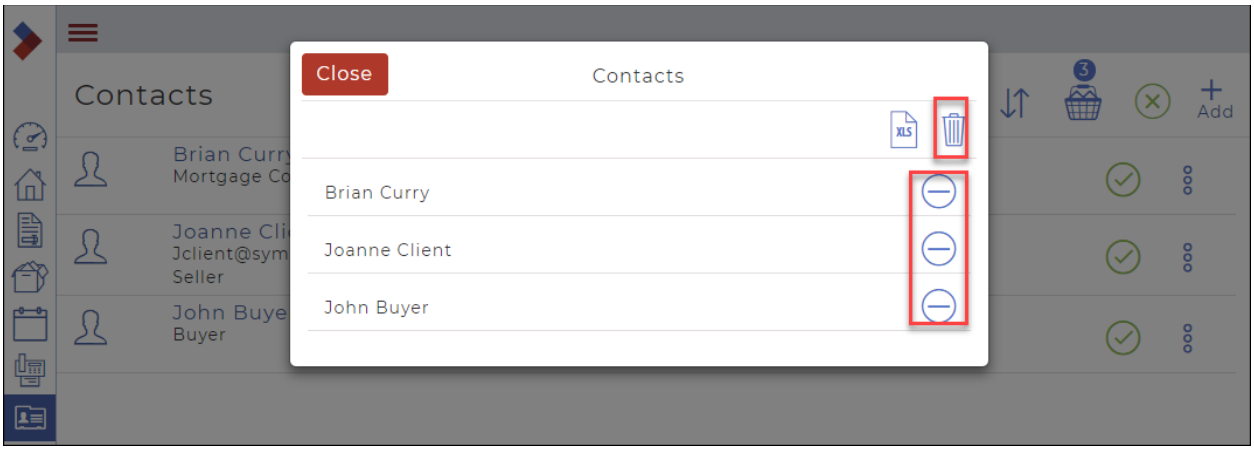
1. In the Sidebar, click **Contacts** .

   The **Contacts** window displays.

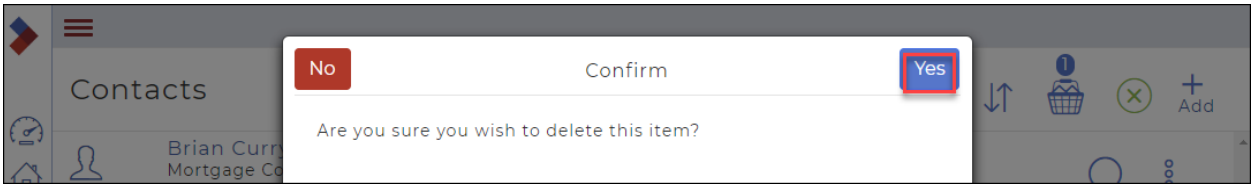
2. Click in the **Select** circle to check the contacts that you need to delete.
   The contacts are added to the basket, which displays how many contacts it contains.



3. Click the **Basket** .
   The Contacts dialog box displays.



4. Click **Delete** .
   A **Confirm** dialog box displays.



5. Click **Yes**.
   A confirmation message briefly displays in the top right, and the contacts are deleted.

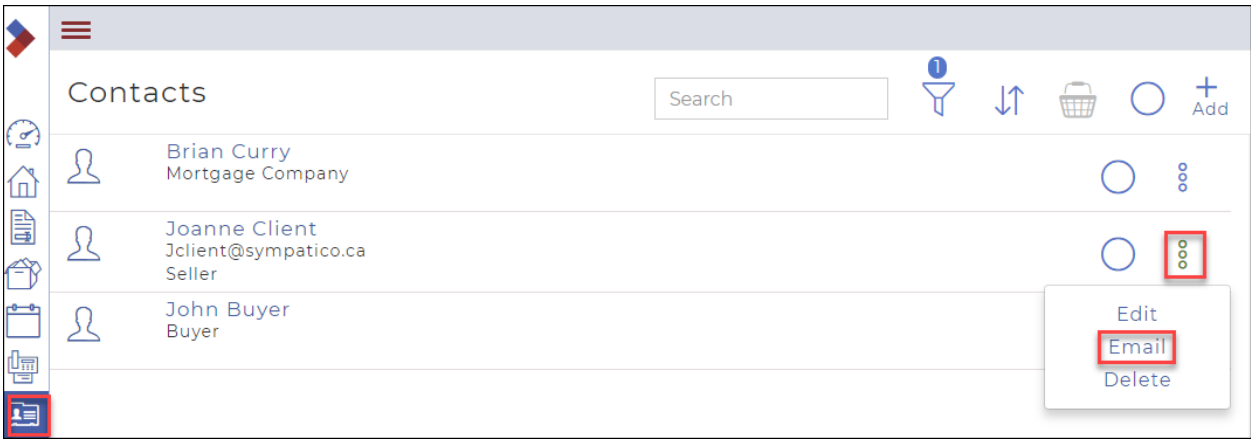
Emailing a contact

You can email a contact directly from the system. This is a time-saving feature that helps increase productivity by allowing you to email a contact without having to switch to your email client. For example, if you need to confirm a desired condition with a prospective buyer, you can send them an email to obtain the information.

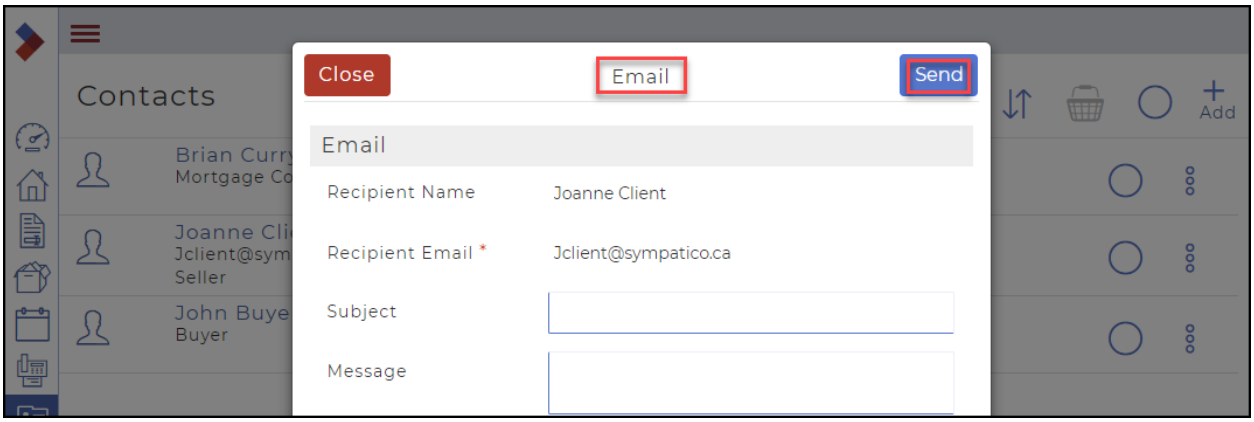
Note: The contact must have an available email address for you to email them.

To email a contact:

1. In the Sidebar, click **Contacts** .
   The **Contacts** window displays.
2. Click the **Ellipses Menu** beside the contact that you need to delete.
   A dropdown menu displays.



3. Click **Email**.
   The **Email** dialog box displays.



Note: Required fields are indicated by an asterisk.*

4. Enter a subject line for the email in the **Subject** field.
5. Enter your email message in the **Message** field.
6. Click **Send**.
   The email is sent to the specified recipient.

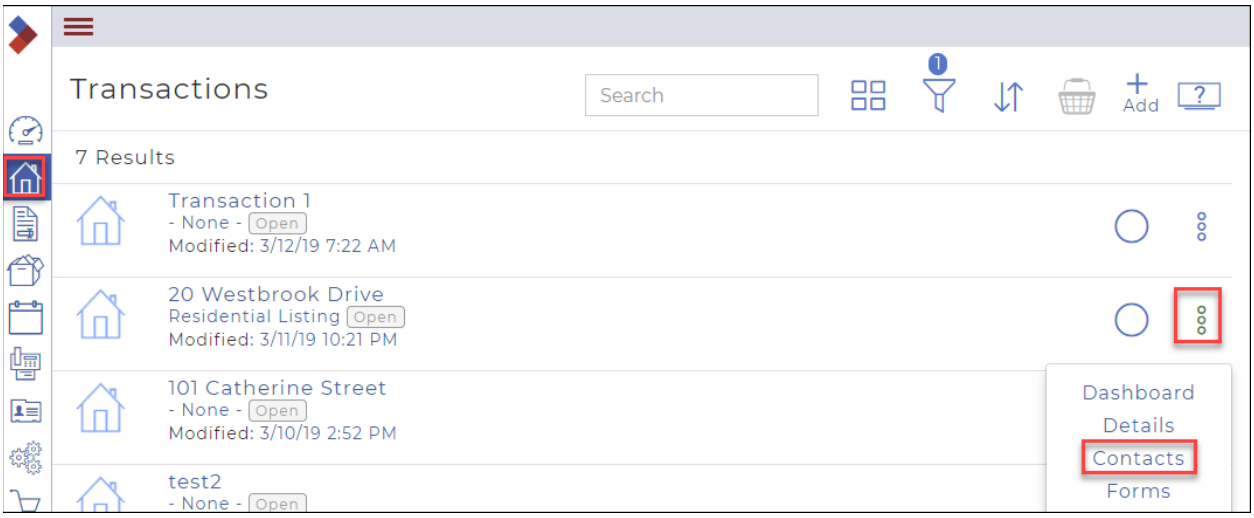
Emailing a contact from a transaction

You can email a contact directly from the system. This is a time-saving feature that helps increase productivity by allowing you to email a contact without having to switch to your email client. For example, if you need to confirm a desired condition with a prospective buyer, you can send them an email to obtain the information.

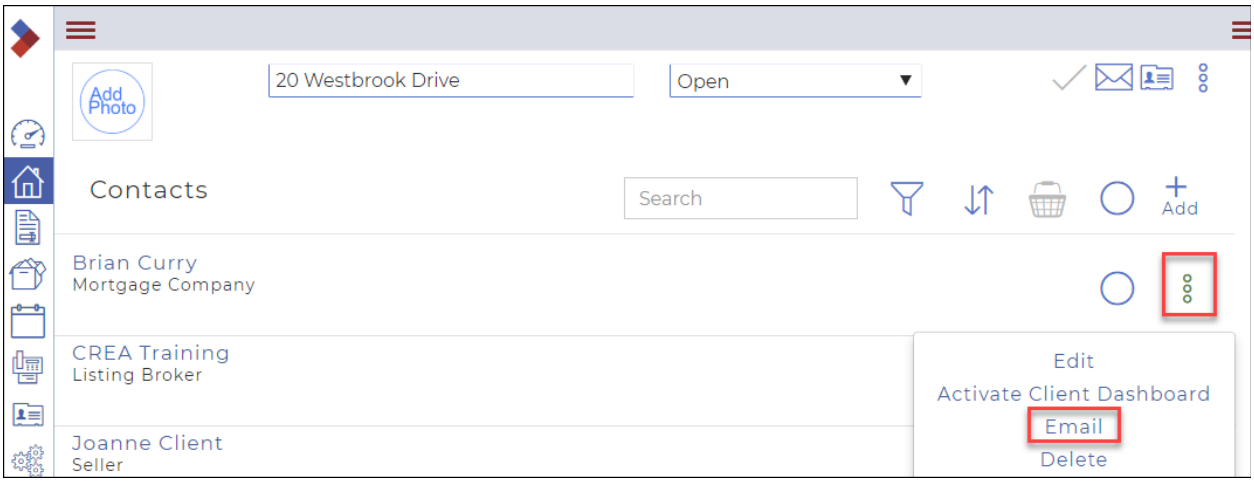
Note: The contact must have an available email address for you to email them.

To email a contact from a transaction:

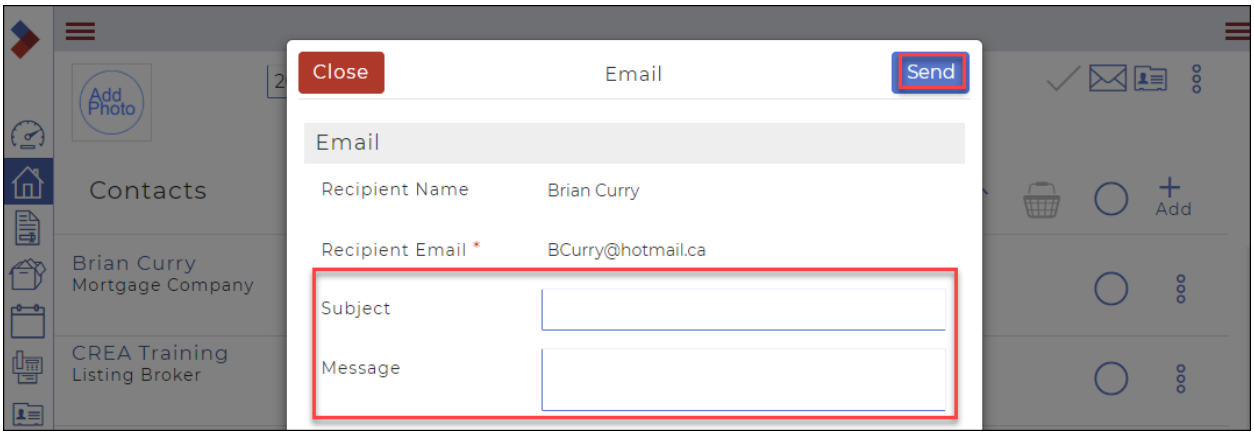
1. In the Sidebar, click **Transaction** .
   The **Transaction**s window displays the list of transactions.
2. Click the **Ellipses Menu** beside the transaction containing the contact you need to email.
   A dropdown menu displays.



3. Click **Contacts**.
   The **Contacts** window displays.
4. Click the **Ellipses Menu** ⋮ beside the contact you need to email.
   A dropdown menu displays.



5. Click **Email**.
   The **Email** dialog box displays.



Note: Required fields are indicated by an asterisk.*

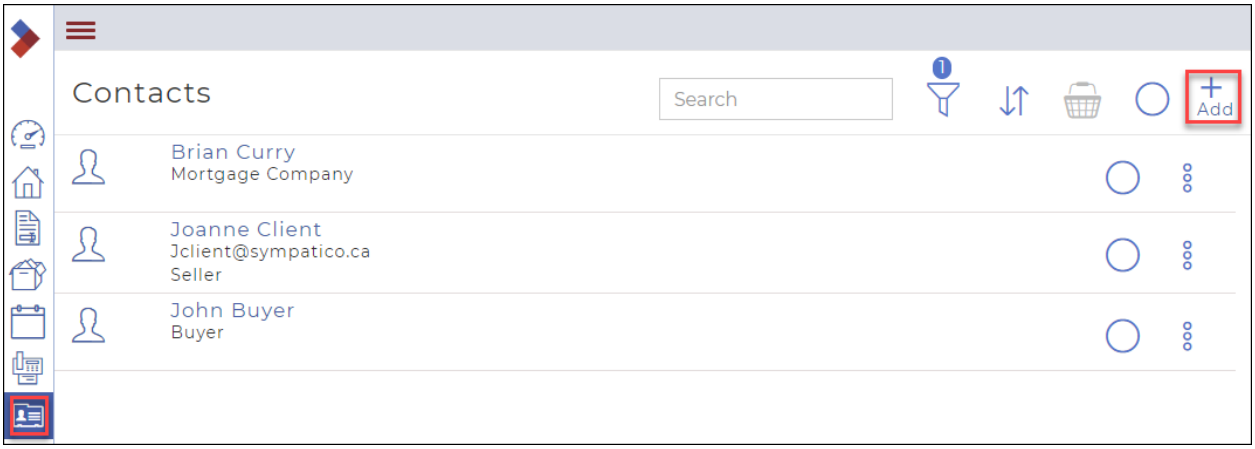
7. Enter a subject line for the email in the **Subject** field.
8. Enter your email message in the **Message** field.
9. Click **Send**.
   The email is sent to the specified recipient.

Importing contacts from a Gmail account

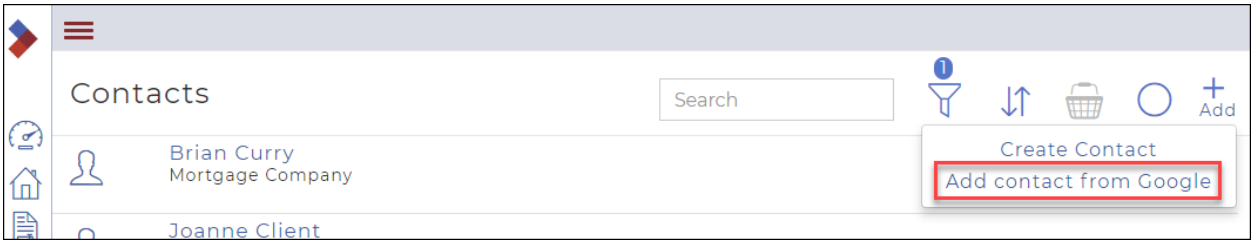
Import your Gmail account contacts into the system when you have Gmail contacts that you intend to use on a transaction. You can add Gmail contacts to your list of contacts or as a transaction contact.

To import a contact from a Gmail account:

1. In the Sidebar, click **Contacts** .
   The **Contacts** window displays.



2. Click **Add**.
   A dropdown menu displays.



3. Click **Add contact from Google**.
   The **Add Google Contact** window opens and displays a list of your available Gmail contacts.

   Note: If you do not currently have a Gmail account associated with your account, you are prompted to enter your Gmail address.

4. Check the contacts you need to import.
5. Click **Select**.
   The selected contacts are added to the list of contacts.

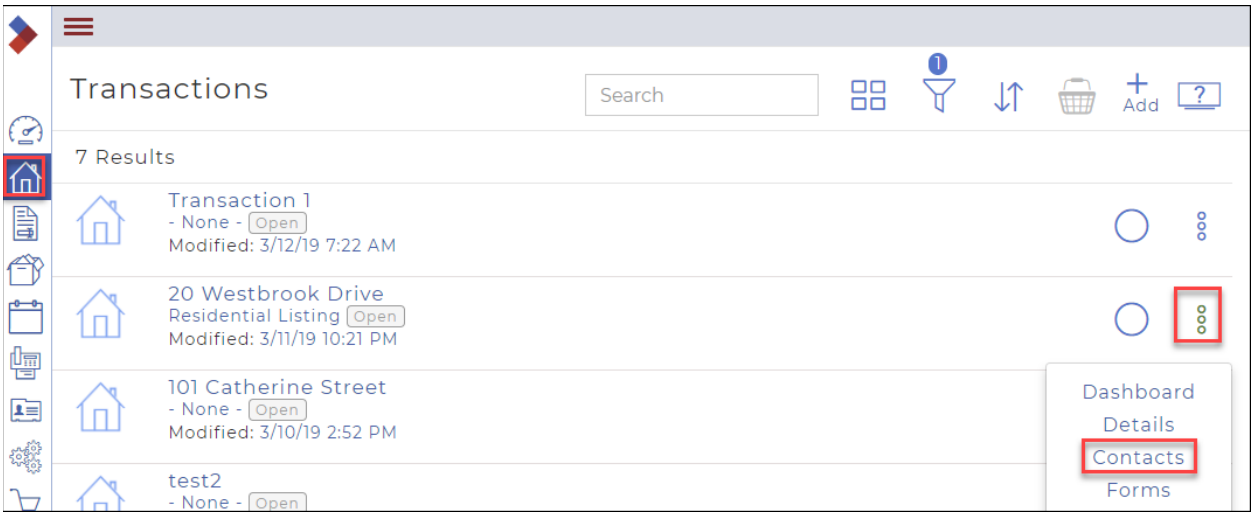
Importing a contact to a transaction from a Gmail account

Import your Gmail account contacts into the system when you have Gmail contacts that you intend to use on a transaction. You can add Gmail contacts to your list of contacts or as a transaction contact.

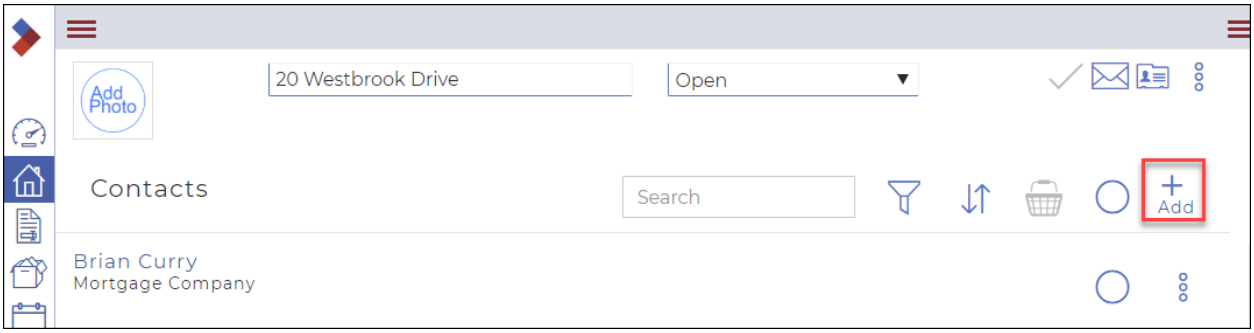
Note: You can only add a single contact to a transaction at a time.

To import a contact to a transaction from a Gmail account:

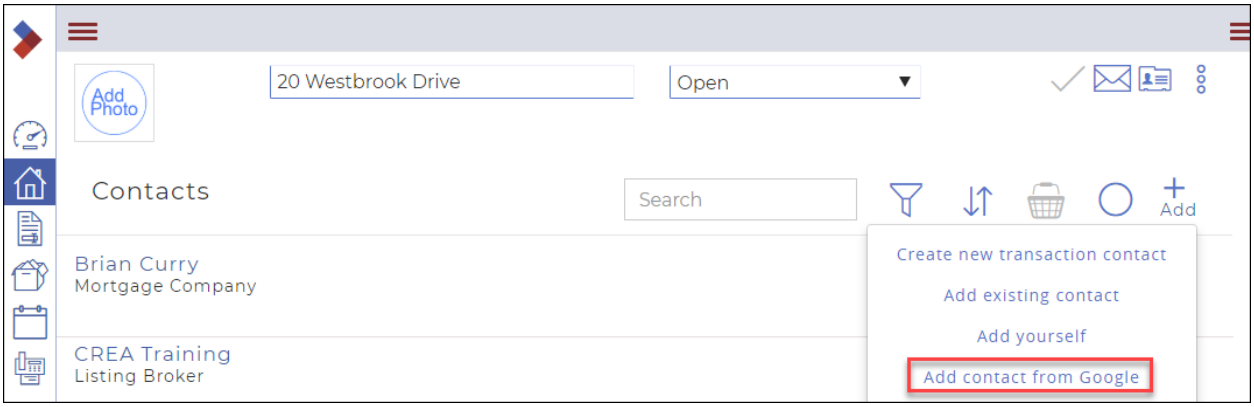
1. In the Sidebar, click **Transaction** .
   The **Transaction**s window displays the list of transactions.
2. Click the **Ellipses Menu** beside the transaction containing the contact you need to import.
   A dropdown menu displays.



3. Click **Contacts**.
   The **Contacts** window displays.



4. Click **Add**.
   A dropdown menu displays.



5. Click **Add Contact from Google**.
   The **Add Google Contact** dialog box opens and displays a list of your available Gmail contacts.

   Note: If you do not currently have a Gmail account associated with your account, you are prompted to enter your Gmail address.

6. Check a contact to import.
7. Click **Select**.

The **Create transaction contact** dialog box opens on the General tab.

8. See "Creating a Contact" for more information on how to add a transaction contact.
9. Click **Save**.
   The selected contact is added to the list of contacts in the selected transaction.

Exporting contacts to a spreadsheet

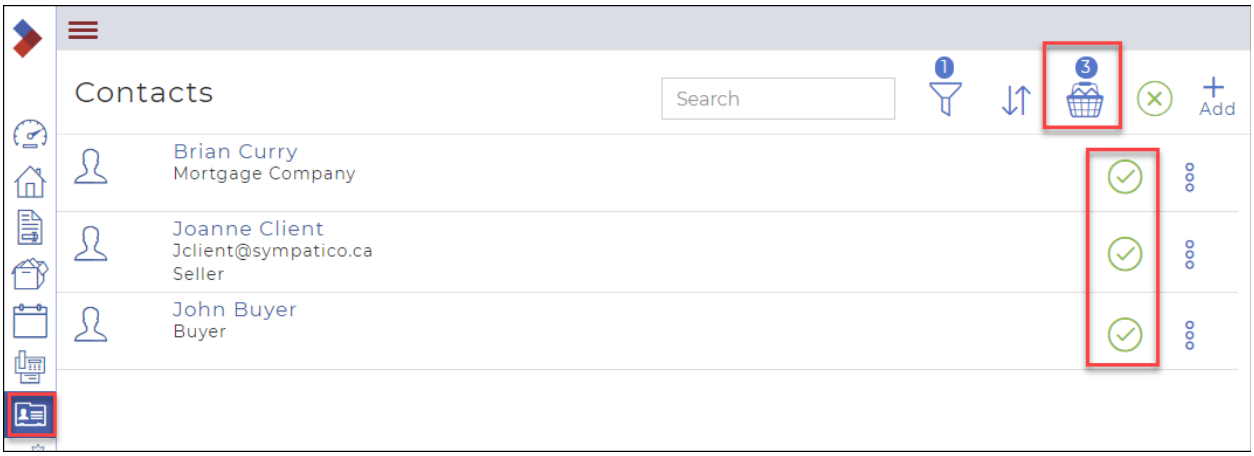
Export your contacts when you need to create an address book outside of the system. The contacts are exported as a .csv spreadsheet file that is compatible with most spreadsheet applications, such as MS Excel.

To export contacts to a spreadsheet:

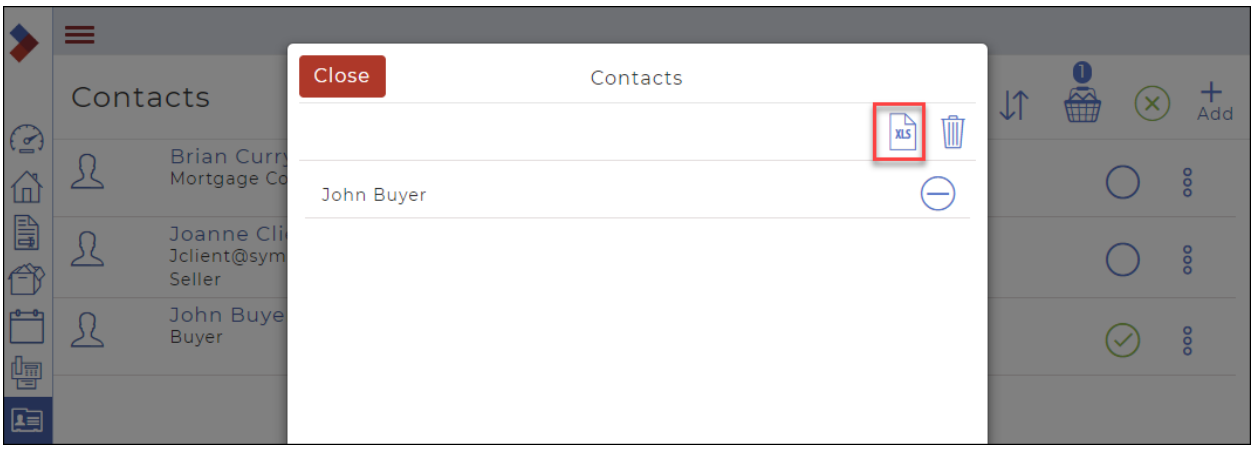
1. In the Sidebar, click **Contacts** .

   The **Contacts** window displays.

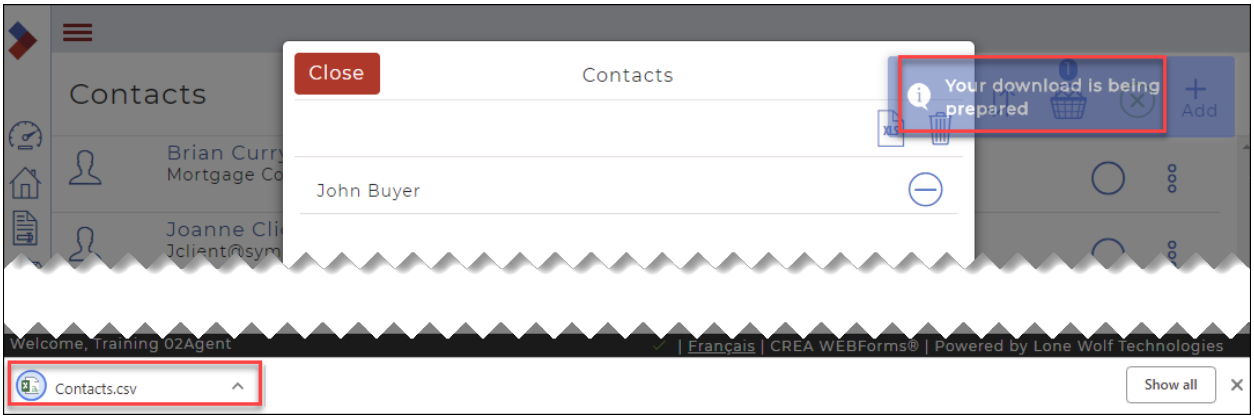
2. Click in the **Select** circle to check the contact(s) that you need to export.
   The contacts are added to the basket, which displays how many contacts it contains.



3. Click the **Basket** .
   The Contacts dialog box displays.



4. Click **Export Contacts to CSV** .
   A message briefly displays in the top right, and your file is downloaded at the bottom of the window.



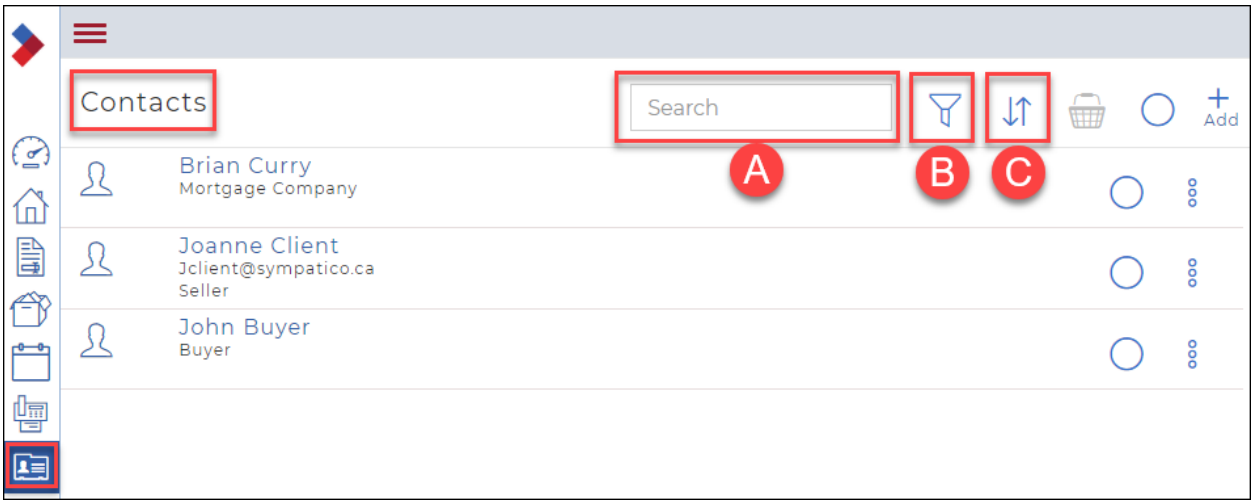
Searching for a contact

You can use the Search function to search for a contact. You can use the filter and sort options to refine your search.

CLICK TO VIEW VIDEO

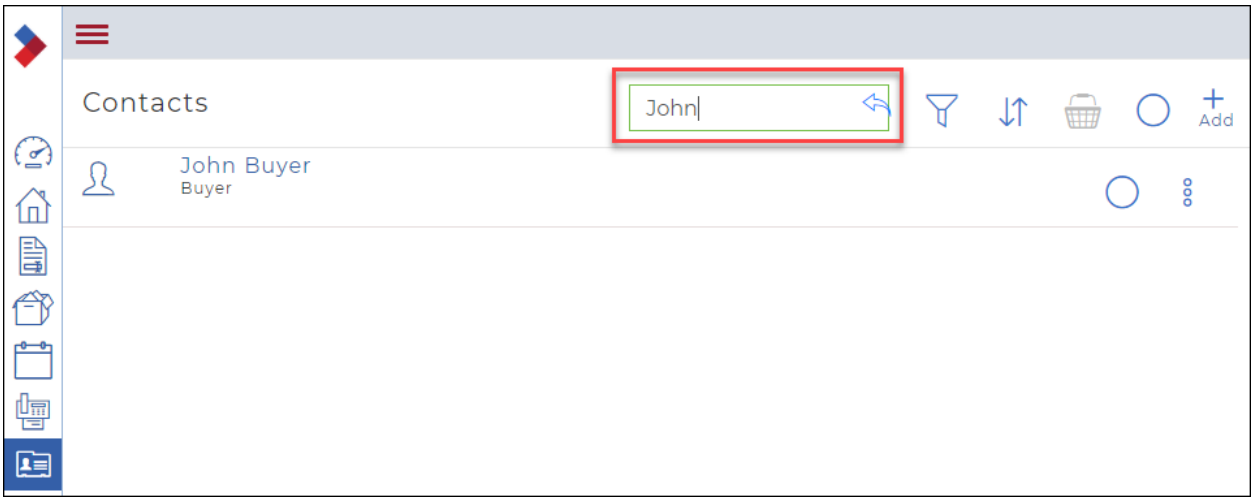
To search for a contact:

1. In the left Sidebar, click **Contacts** .
   The **Contacts** window displays.



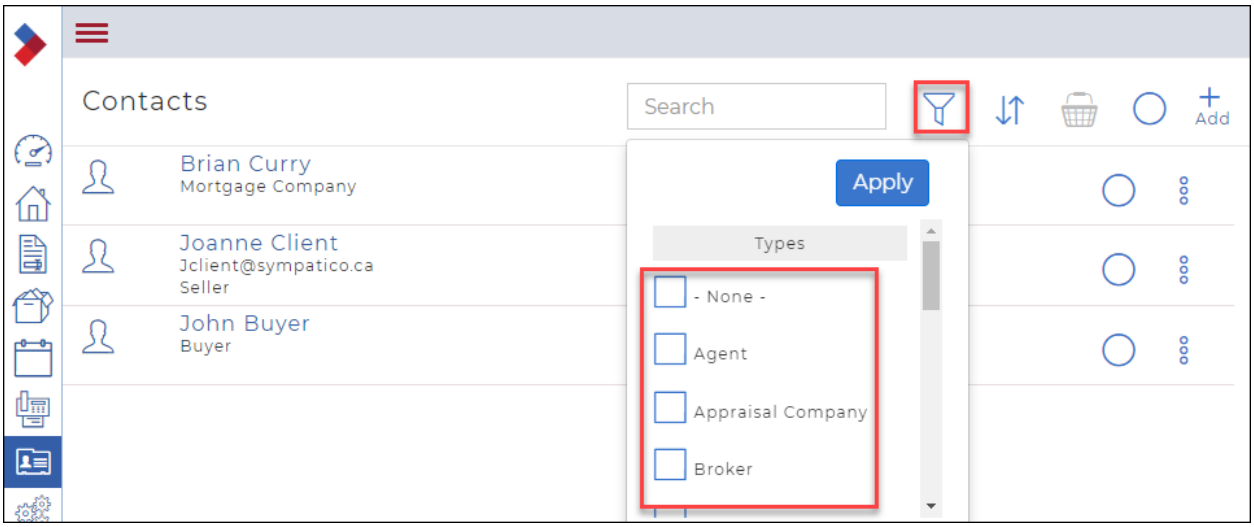
A. Search

The **Search** bar can be used to find specific contacts.



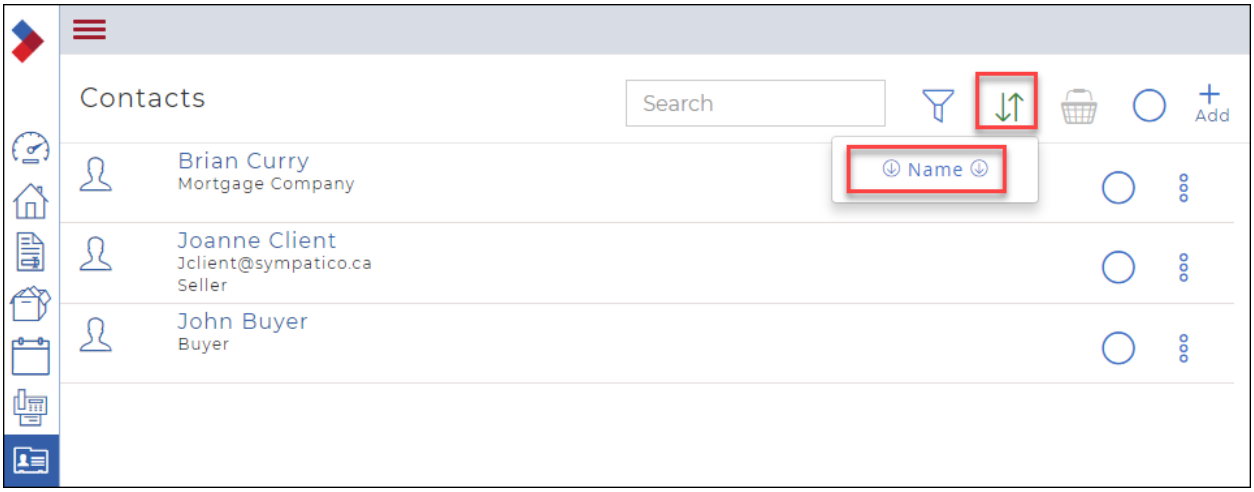
B. Filter

Click **Filter** to display a dropdown, then select the relevant filter for the contact you are searching for.



C. Sort

Click **Sort** to sort the names in ascending or descending order.



Working with Checklists and Tasks

You use checklists and tasks to manage the work associated with closing a deal.

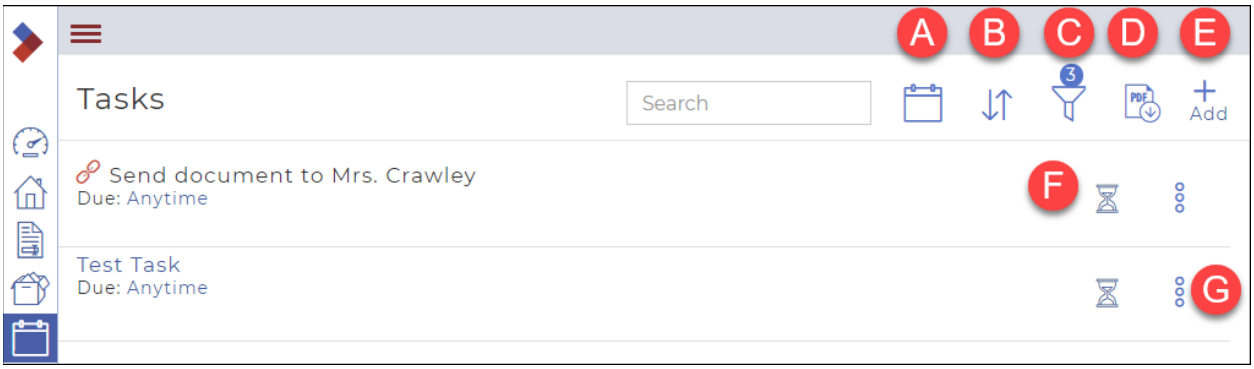
CLICK TO VIEW VIDEO

This section includes:

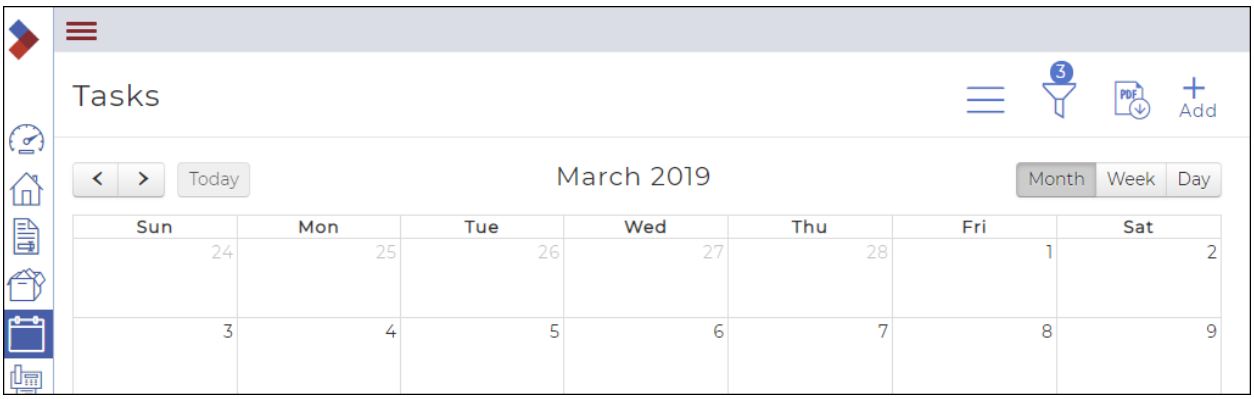
- Understanding checklists and tasks
- Creating a new task
- Editing a standalone task
- Completing or Reopening a task
- Deleting a standalone task
- Deleting a task from a transaction
- Viewing incomplete tasks
- Creating a checklist
- Creating a checklist by copying an existing checklist
- Editing a checklist
- Deleting a checklist

Understanding checklists and tasks

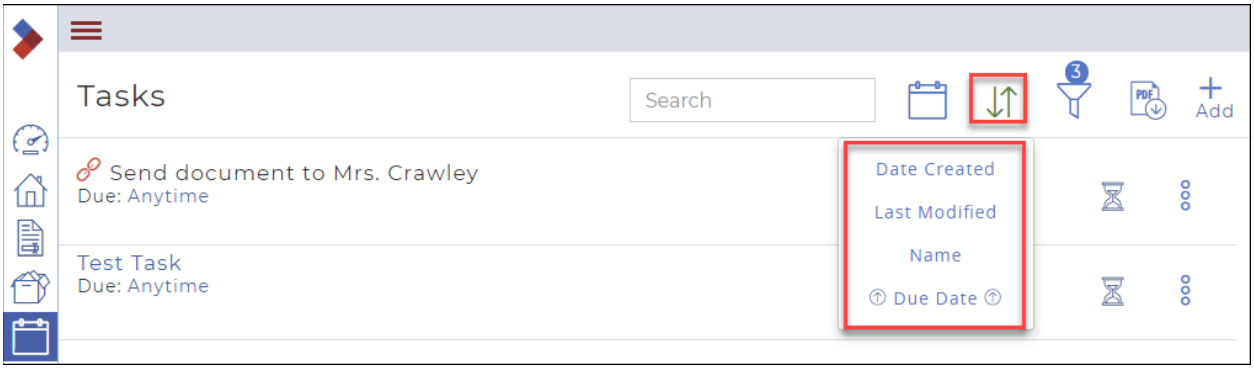
The task window displays icons for the different actions.



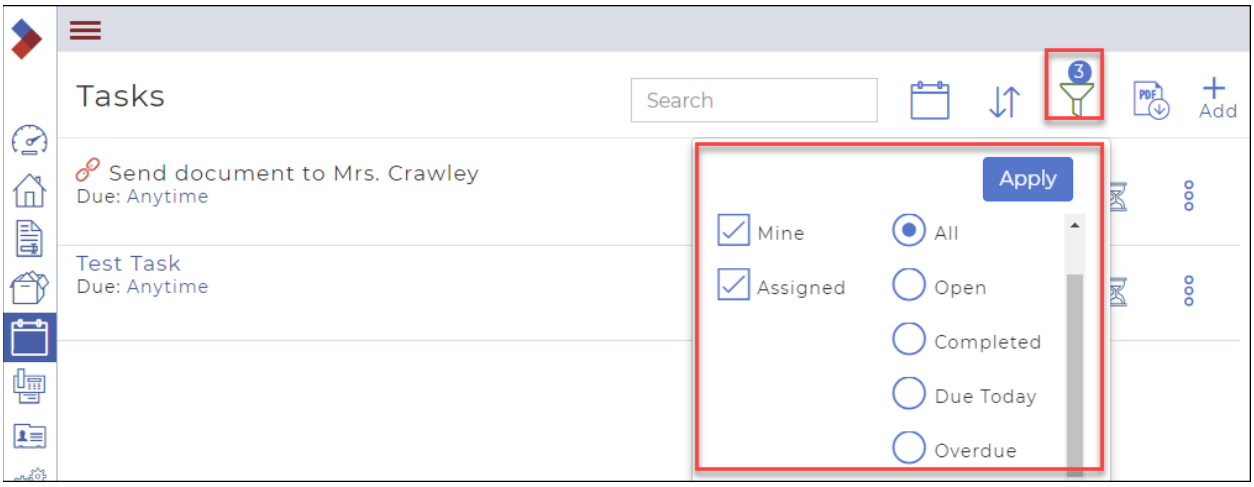
A. **Calendar/List**: Toggles between the default list view, and the calendar view



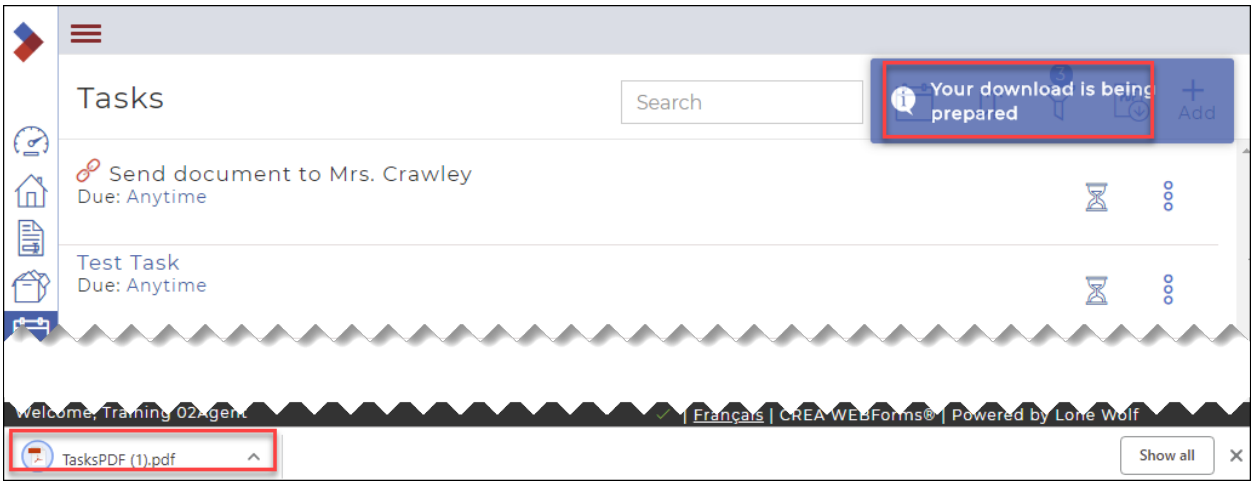
B. **Sort**: Displays a dropdown with different sorting options



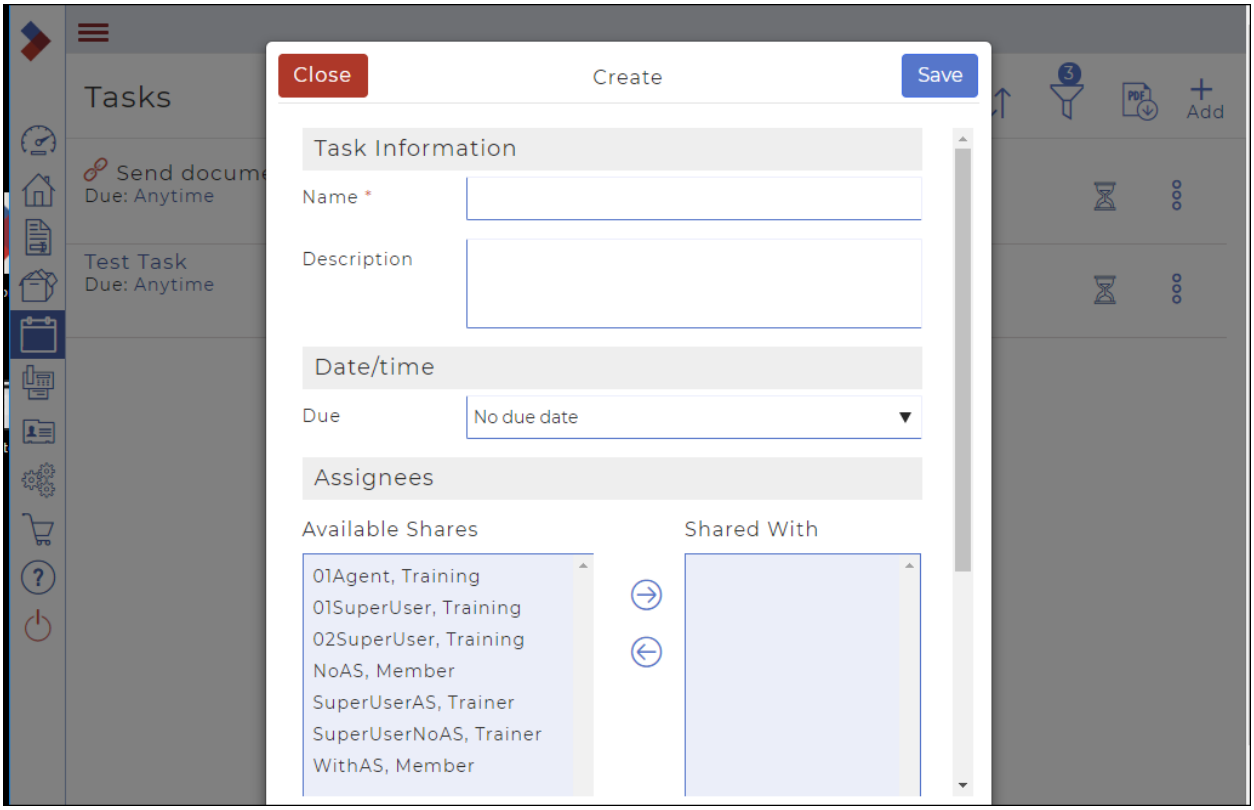
C. **Filter**: Displays a dropdown with different filtering options.



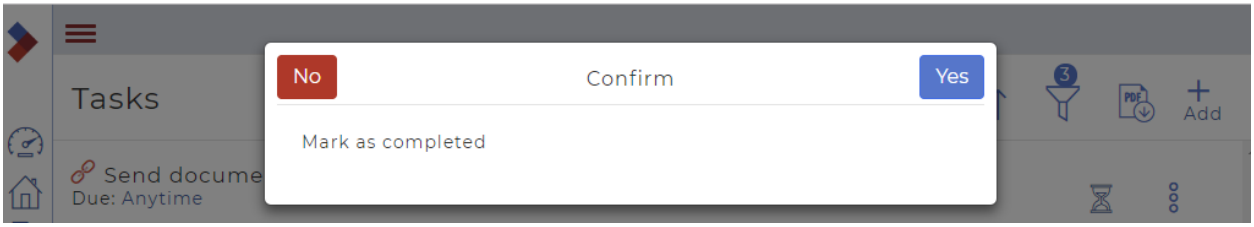
D. **Task to PDF**: Downloads a PDF of the tasks



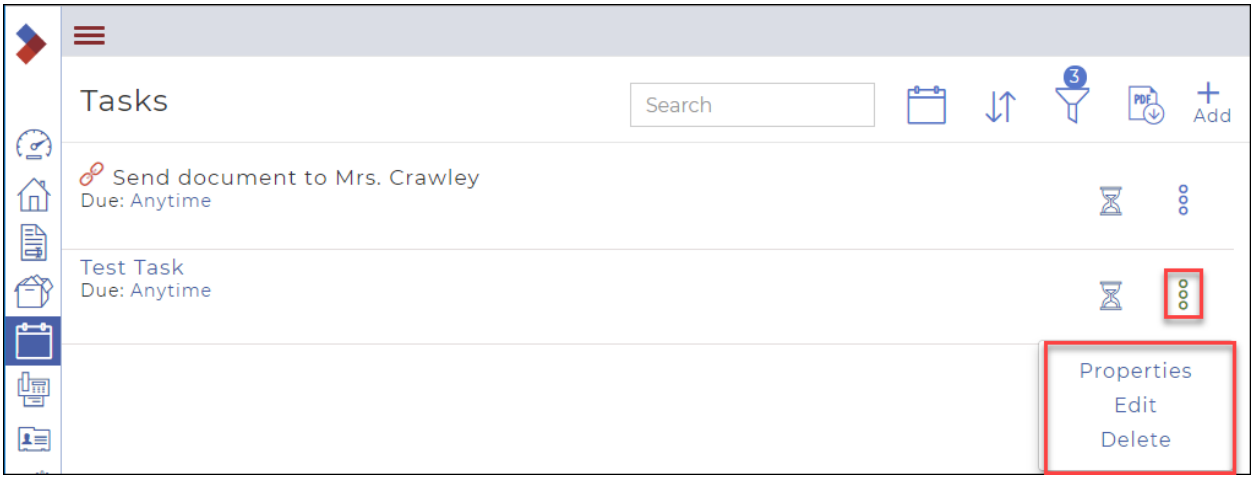
E. **Create Task**: Click Add to add a new task.



F. **Hourglass**: Currently Open: Click to Complete: Displays a dialog box to confirm completion of a task



G. **Ellipses Menu** icon: Displays a dropdown menu with options



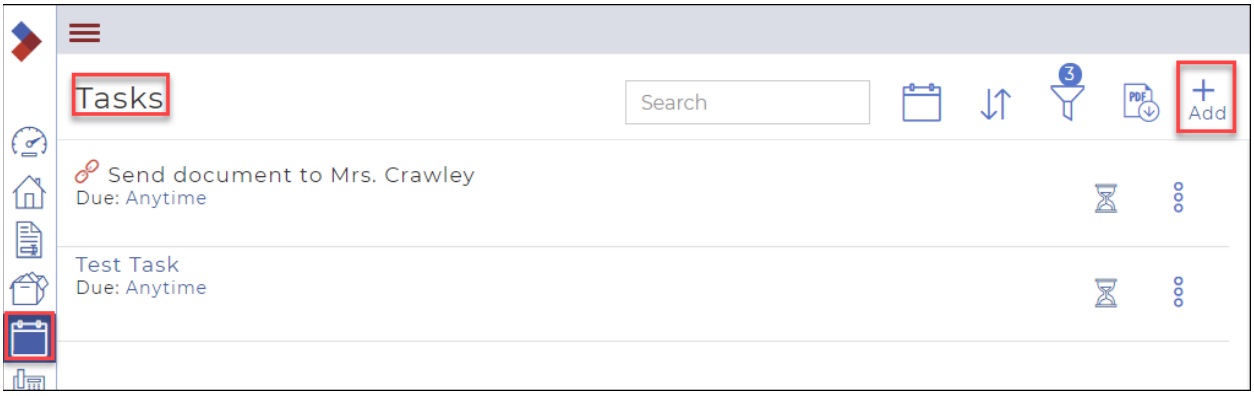
Creating a new standalone task

If you have tasks that must be completed on a regular basis for certain types of transactions, you should create those tasks as part of a checklist and include the checklist in a template for that transaction type. However, if you occasionally need a task that can be assigned to you, or to another member of your team, a standalone task will suffice.

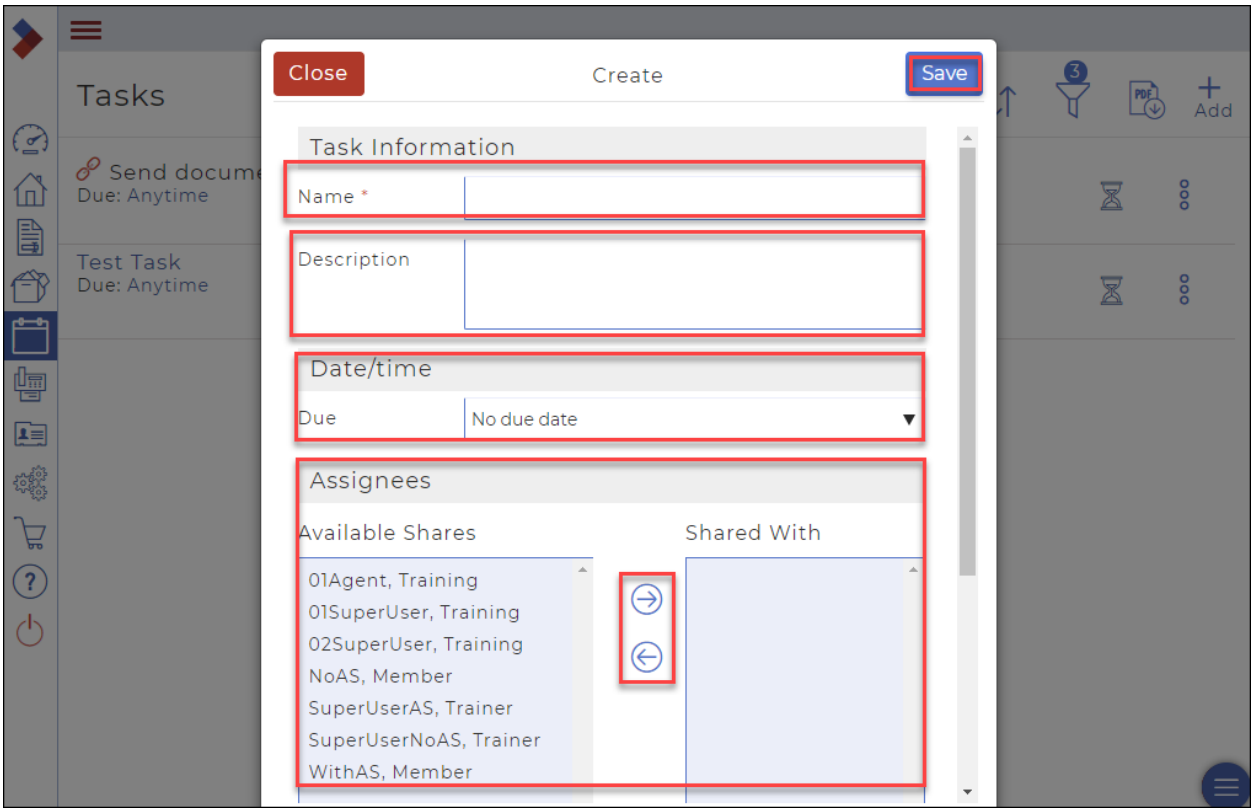
CLICK TO VIEW VIDEO

To create a new standalone task:

1. In the Sidebar, click **Task Manager** .
   The **Tasks** window displays.

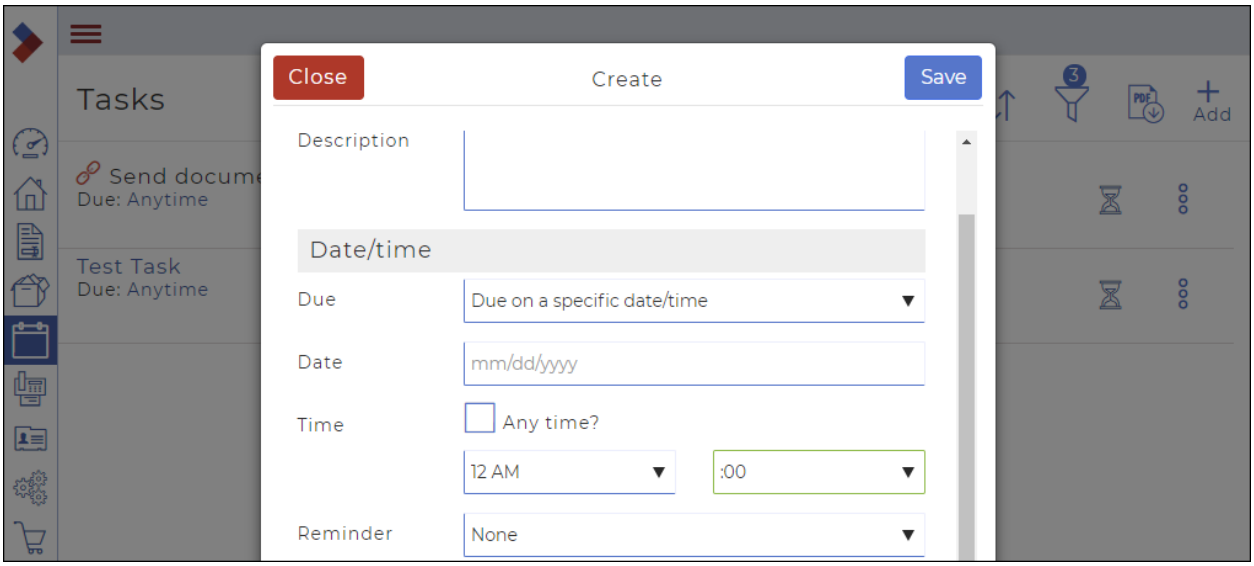


2. Click **Add**.
   The **Task Information** dialog box displays.



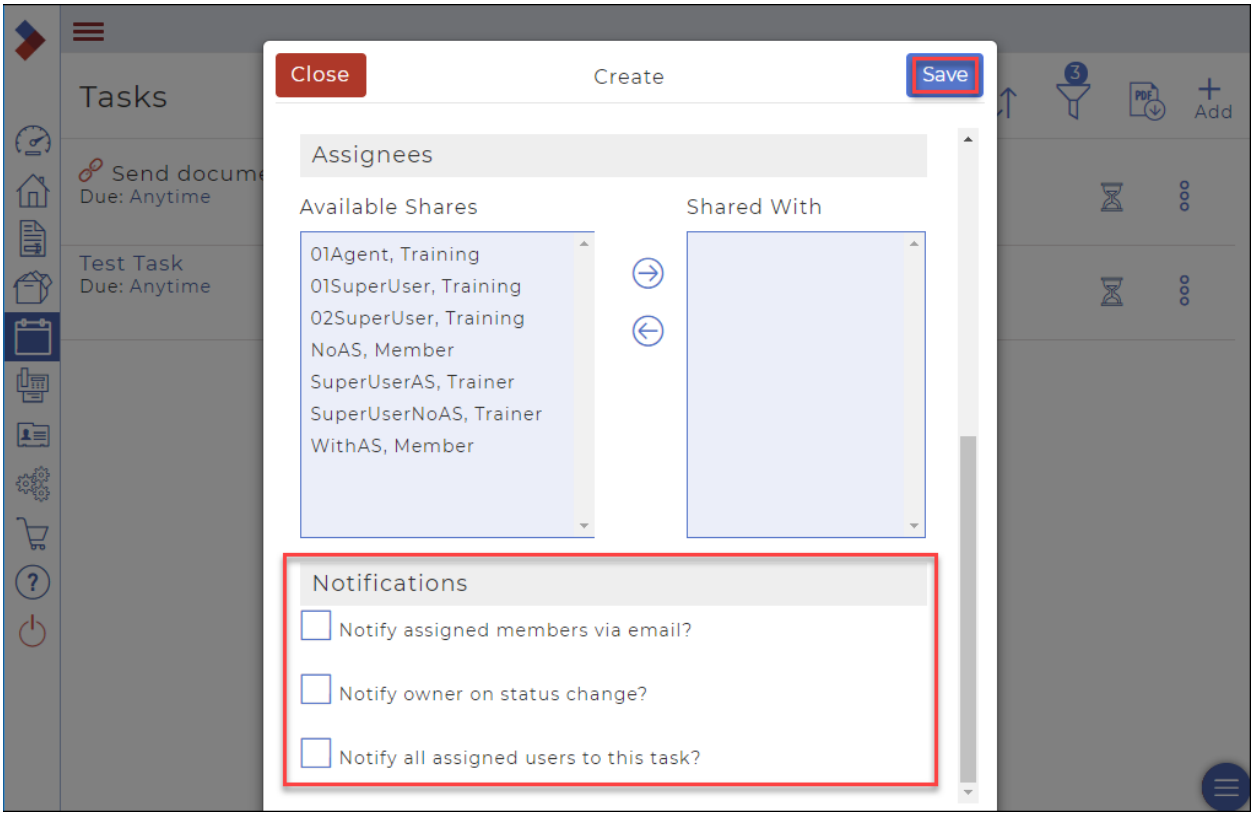
Note: Required fields are indicated by an asterisk.*

3. Required: In the **Name** field, enter a meaningful name for the task.
4. Optional: In the **Description** field, enter a description for the task. Be sure it contains enough information to complete the task.
5. Optional: Use the **Due** dropdown to select when the task is due: Either
   A. No Due Date
   B. On a specific date



- If the task is due on a specific date, in the Date field, select the date from the calendar that displays.
- In the Time fields, specify whether the task can be completed any time, or if it must be completed by a specified time on the selected date
- Use the Reminder dropdown to select when a reminder should be sent. Choose from no reminder (None), or select 15 minutes before, one hour before, one day before, or one week before the due date.

6. **Assignees**: You can assign the task to a member of your team (share group) by selecting the name of the team member from the left list, then clicking the right arrow to add the team member as an assignee to the task.
7. Scroll down to see the **Notifications** area, then check any desired notification options: You can choose to notify the assignee by email, notify the owner of the task when the status of the task changes, and notify all users assigned to this task.



8. Click **Save**.
   The task is added to your list of tasks. Only you and any assigned team members can see this task in their list of tasks.

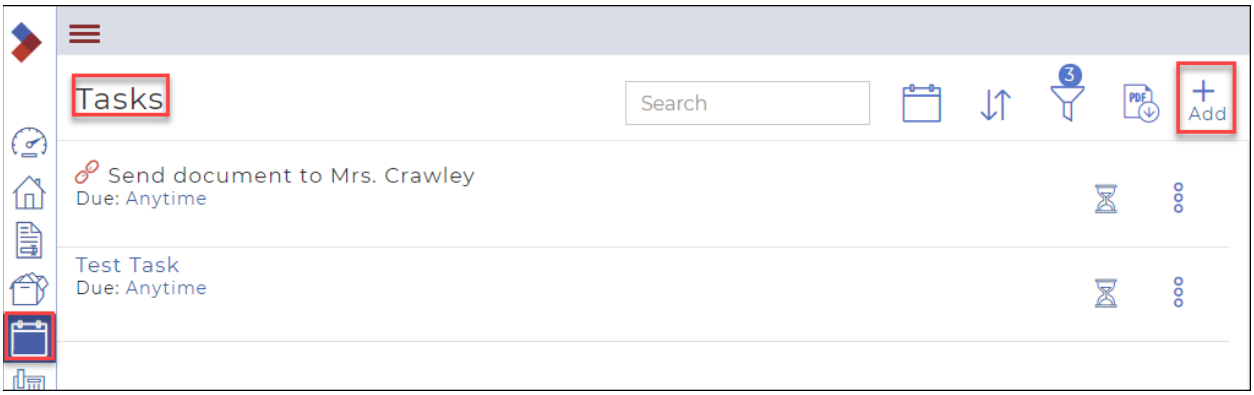
Editing a standalone task

You can change a task, including assigning the task to another person, changing the due date on the task, or changing the notifications to be sent regarding the task.

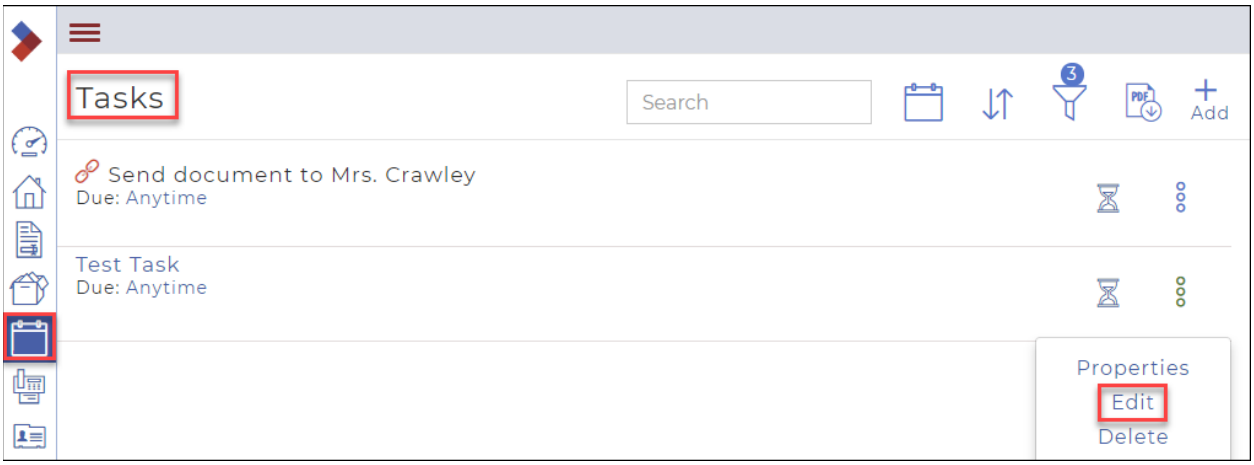
CLICK TO VIEW VIDEO

To edit a standalone task:

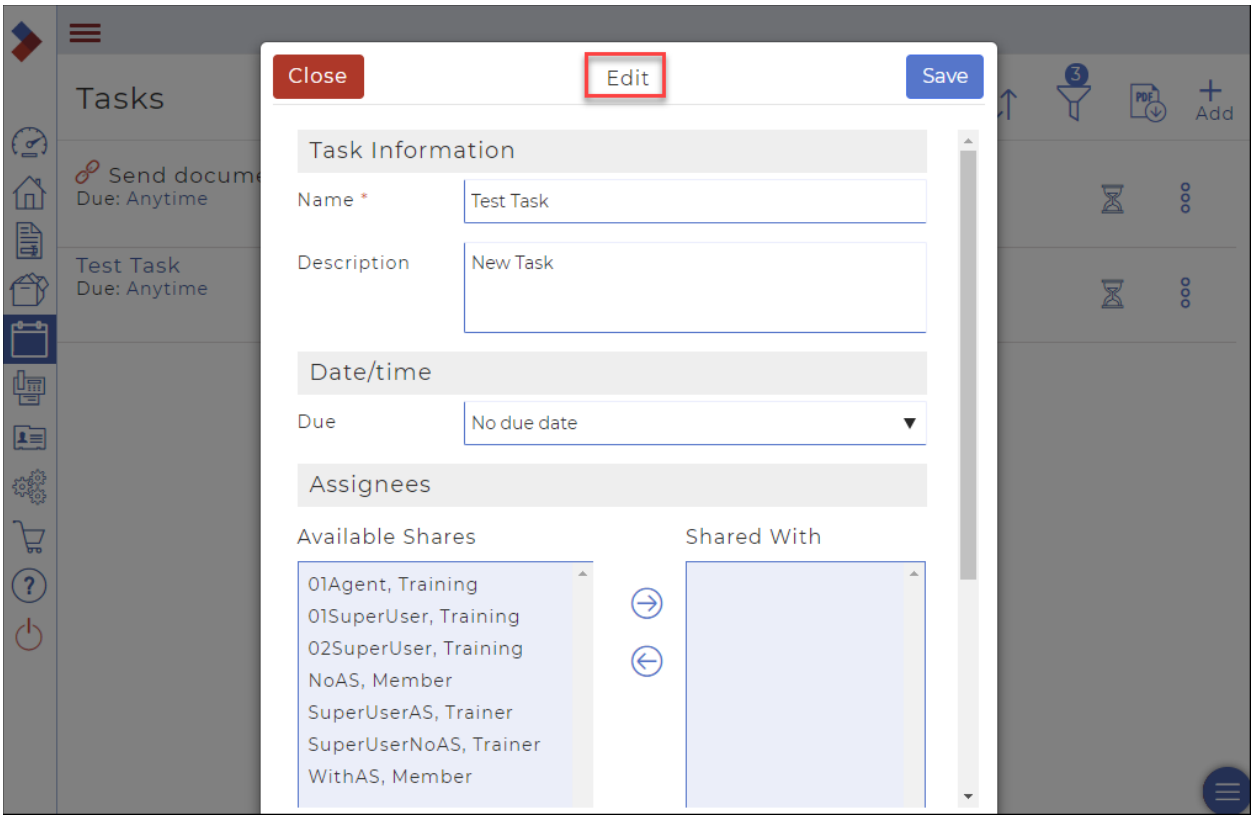
1. In the Sidebar, click **Task Manager** .
   The **Tasks** window displays.



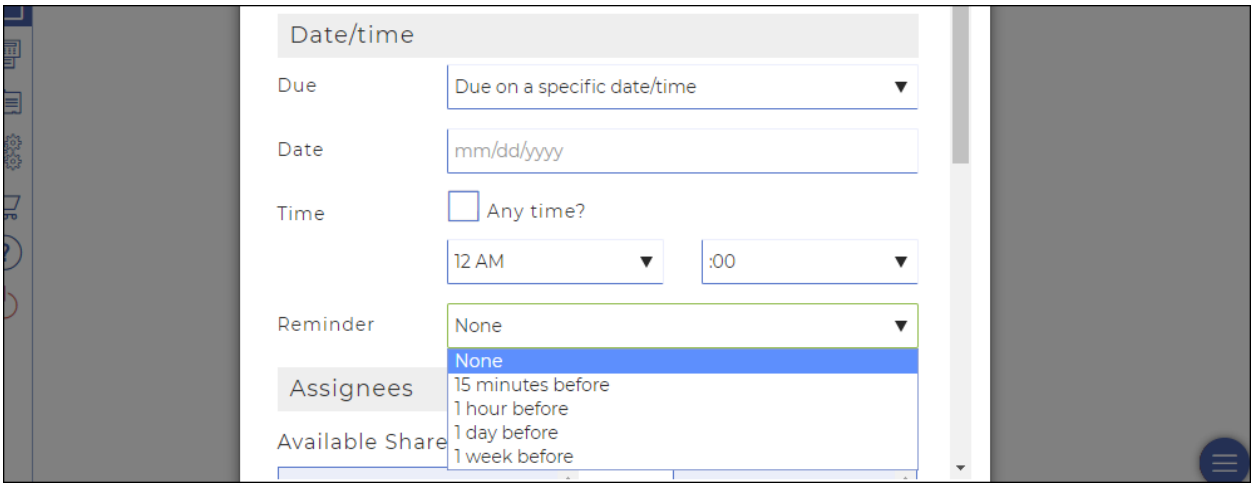
2. Click the **Ellipses Menu** to the right of the task to display a dropdown.



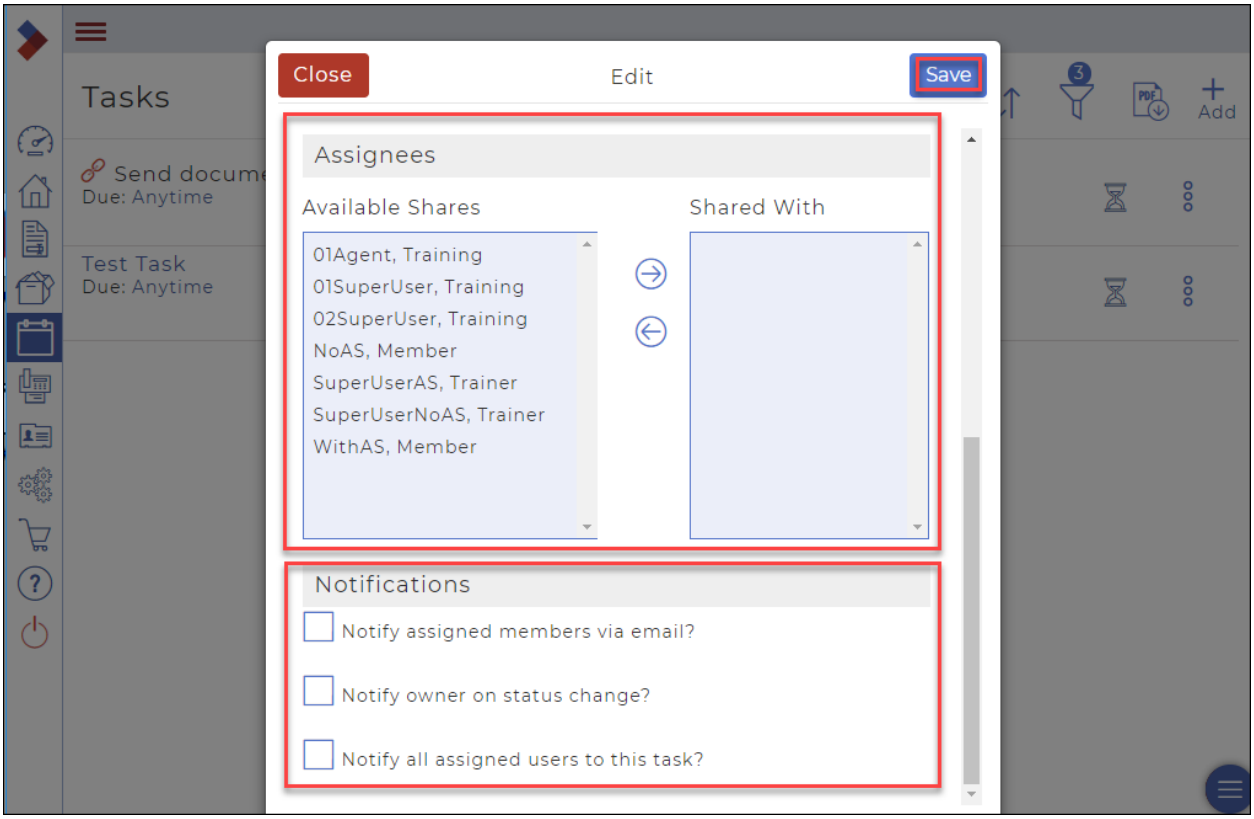
3. Click **Edit**.
   The Edit dialog box displays.



4. To give the task a due date, do the following:
    - Use the **Due** dropdown to select **Due on a specific date/time**. Additional items display.



- If the task is due on a specific date, in the **Date** field, select the date from the calendar that displays.
- In the **Time** fields, specify whether the task can be completed any time, or if it must be completed by a specified time on the selected date.
- Use the **Reminder** dropdown to select when a reminder should be sent. Choose from no reminder (None), or select 15 minutes before, one hour before, one day before, or one week before the due date.



5. To assign the task to a team member, in the **Assignees** section, select the name of the team member from the left list, and click the right arrow to add the team member as an assignee to the task.
6. To one or more notifications to the task, scroll down to see the **Notifications** area, and check any desired notification options: You can choose to
    - notify the assignee by email,
    - notify the owner of the task when the status of the task changes, and
    - notify all users assigned to this task.
7. Click **Save**.

Completing or reopening a task

You use checklists and tasks to manage the work associated with closing a deal. When you have finished doing the work outlined in a task, you want to mark the task complete. If you mark a task as complete in error, you can reopen the task until it is complete.

You can:

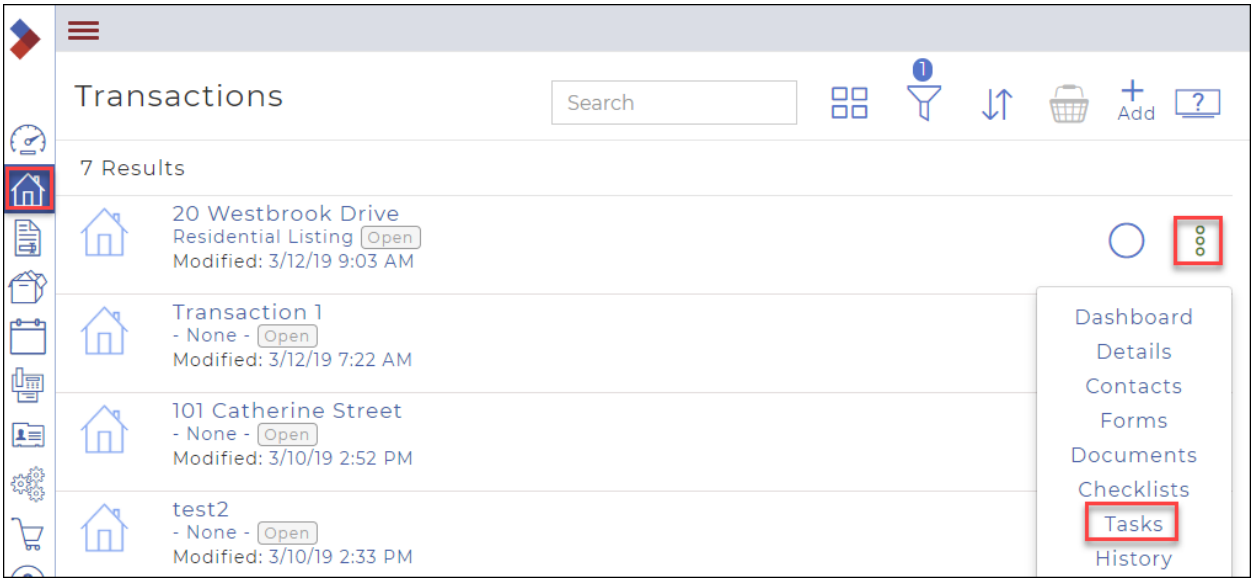
- Mark a task complete in a transaction
- Mark a standalone task complete
- Reopen a completed task

CLICK TO VIEW VIDEO

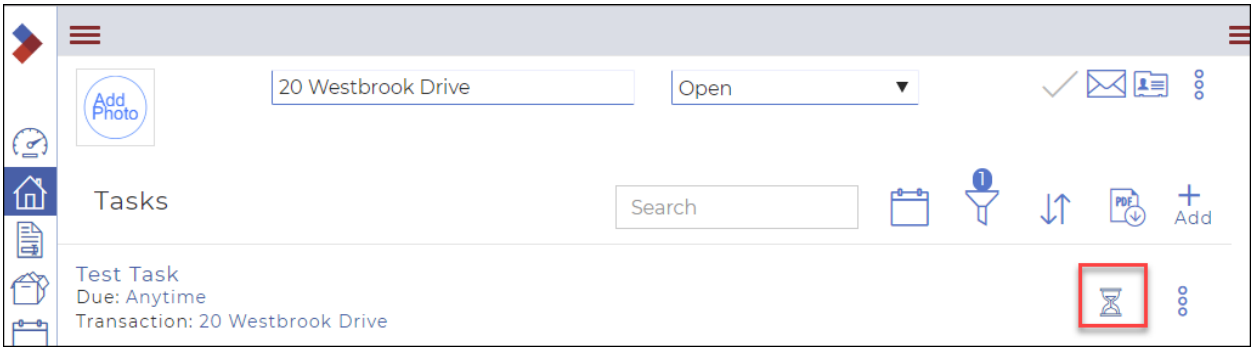
To mark a task complete in a transaction:

1. In the Sidebar, click **Transaction** .
   The **Transaction**s window displays the list of transactions.

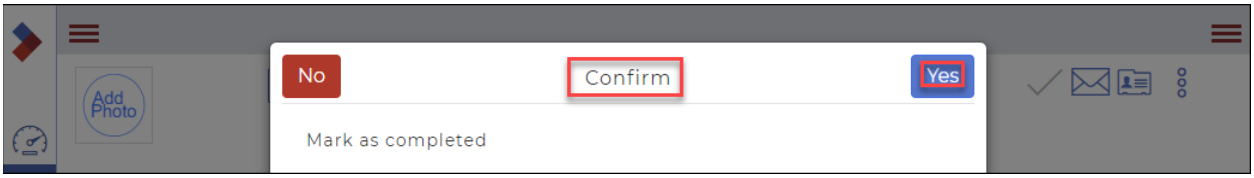
2. Click the **Ellipses Menu** ⋮ beside the transaction the task is associated with.
   A dropdown displays.



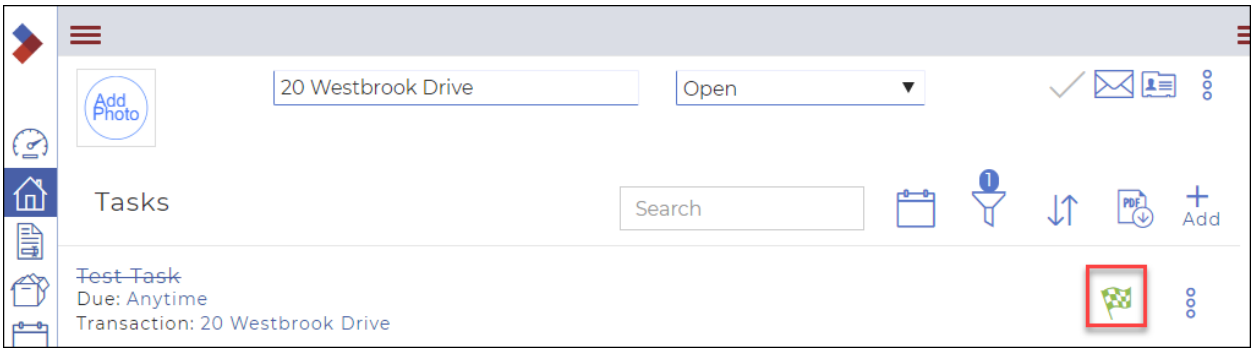
3. Click **Tasks**.
   The list of tasks for the transaction displays.



4. Click the **Hourglass** ⧗ to the right of the task name.
   A **Confirm** dialog box displays.

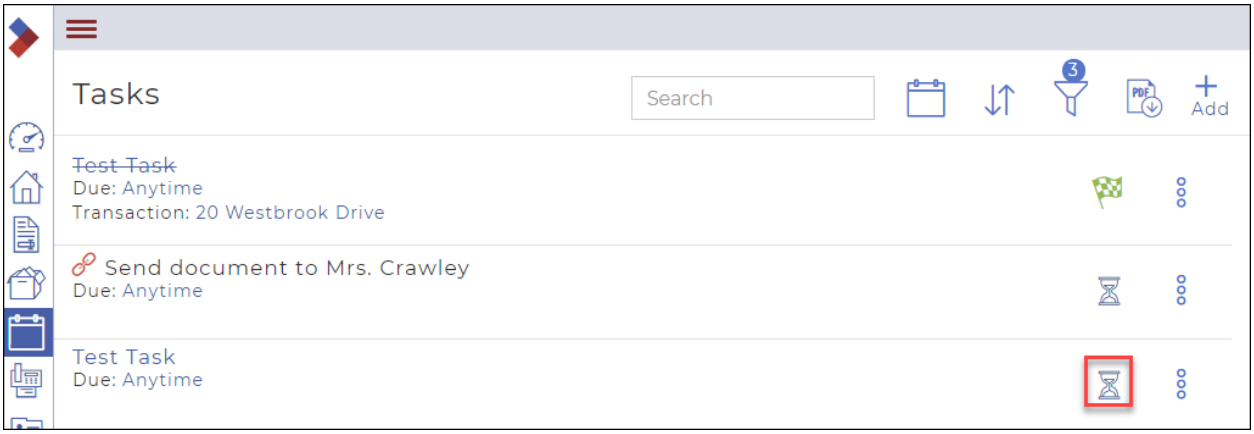


5. Click **Yes**.
   The task is completed, and a checkered flag displays in place of the hourglass.

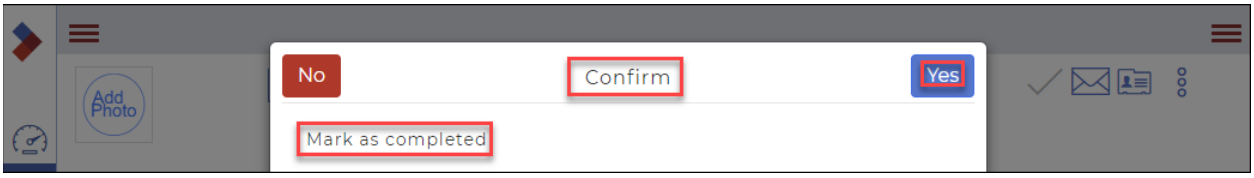


To mark a standalone task complete:

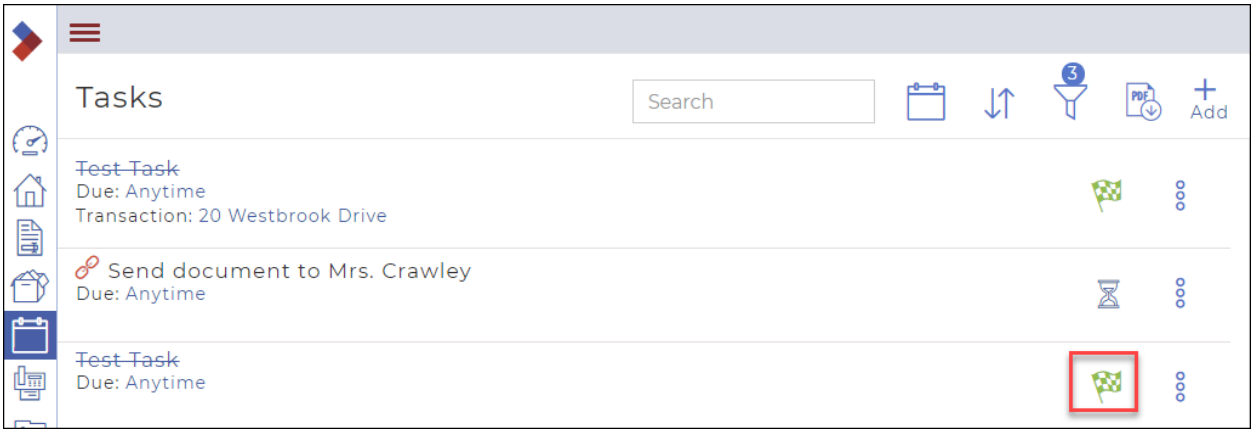
1. In the Sidebar, click **Tasks** .
   The list of standalone and transaction tasks is displayed.



2. Click the hourglass to the right of the task name.
   A **Confirm** dialog box displays.

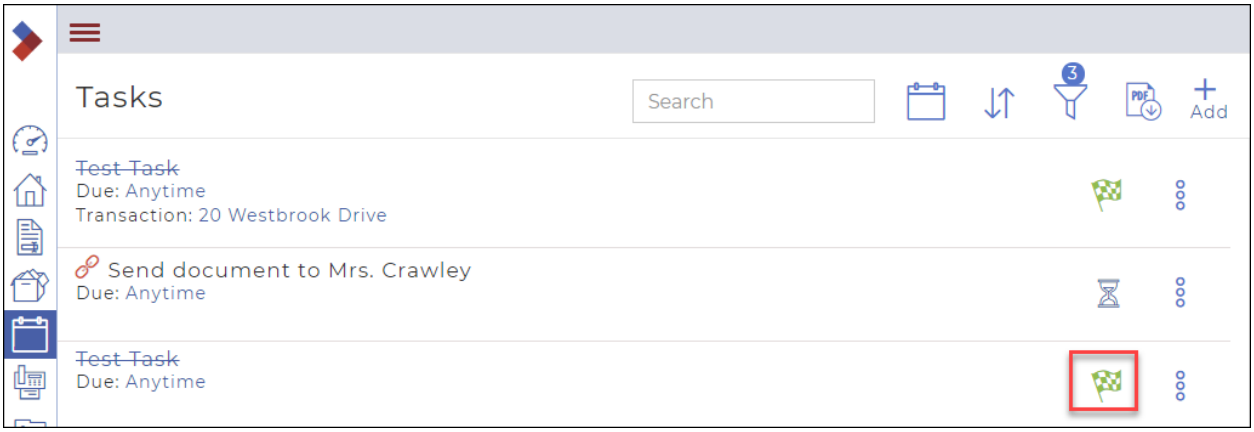


3. Click **Yes**.
   The task is completed, and a checkered flag displays in place of the hourglass.

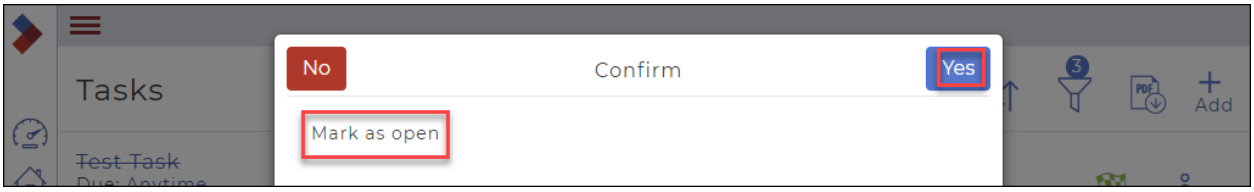


To reopen a completed task:

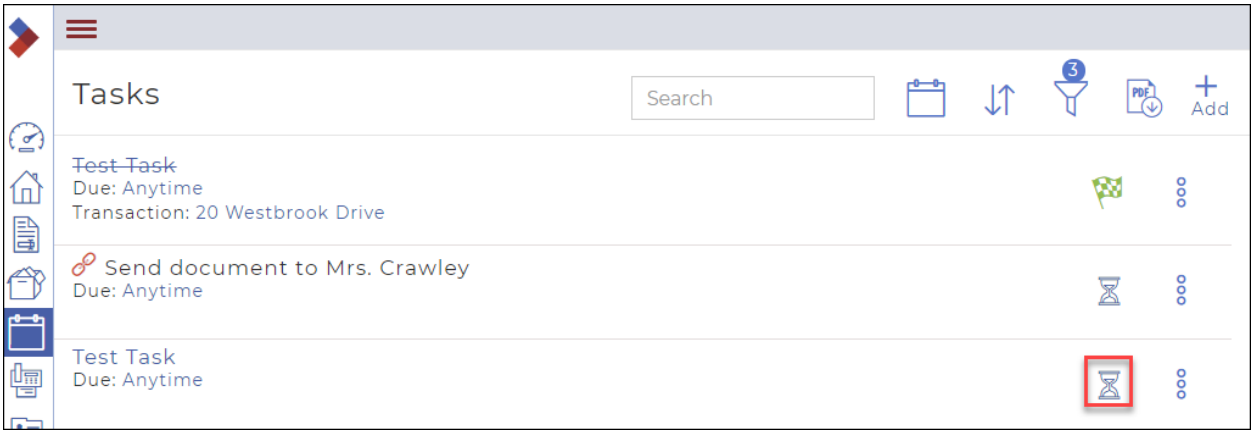
1. In the Sidebar, click **Tasks** .
   The list of standalone and transaction tasks is displayed.



2. Click the flag to the right of the task name.
   A **Confirm** dialog box displays.



3. Click **Yes**.
   The task is reopened, and an hourglass displays in place of the flag.



Deleting a Standalone task

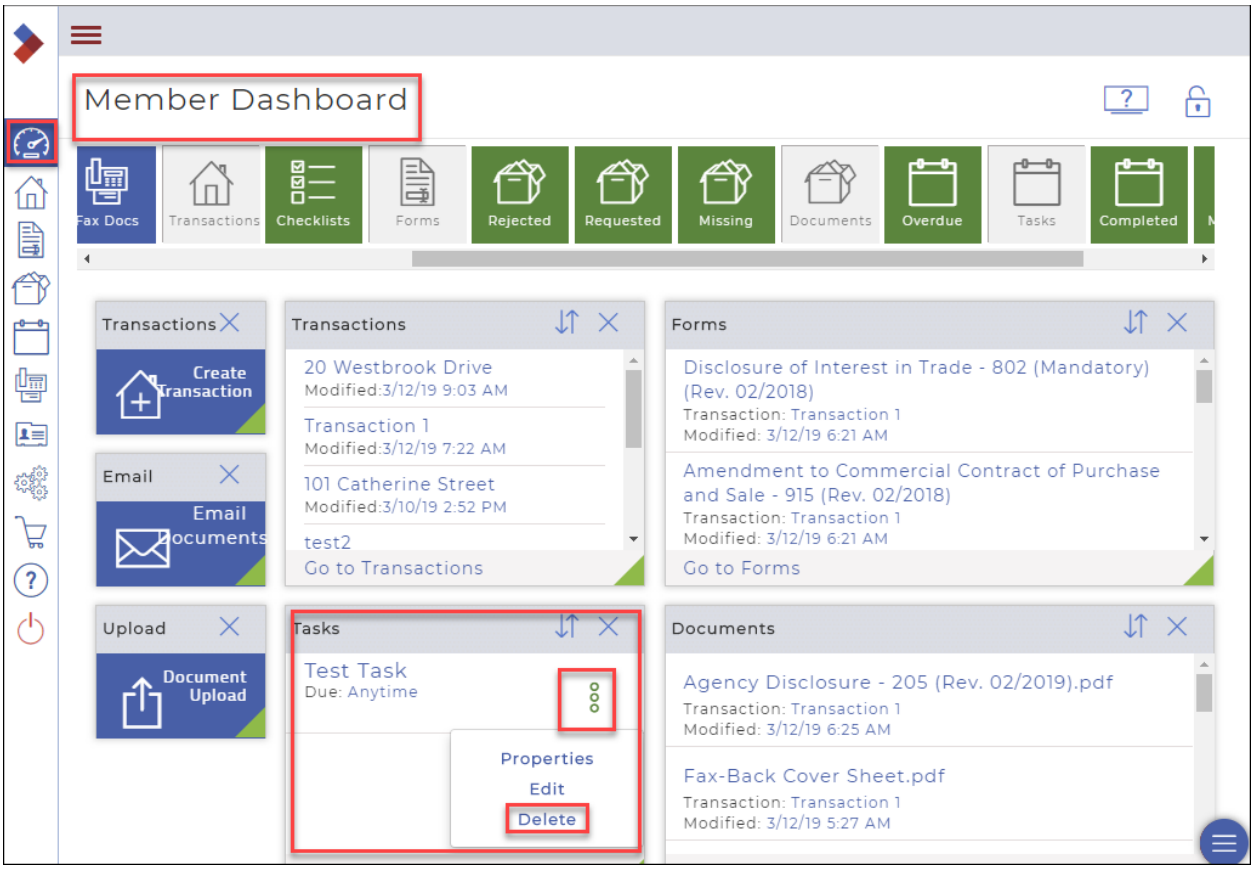
You may discover that you no longer need to complete a task, either a standalone task or a task that is part of a transaction.

CLICK TO VIEW VIDEO

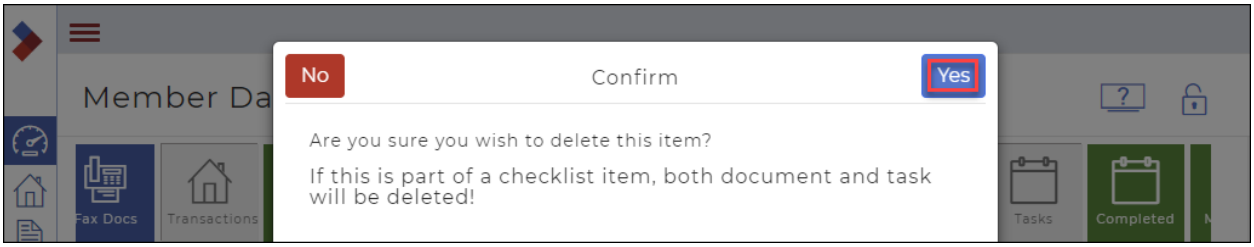
You can delete a task from either the member dashboard or the task manager.

To delete a standalone task from the member dashboard:

1. In the sidebar, click **Dashboard** .
   The Member Dashboard displays.
2. Ensure the **Tasks** widget is enabled. The tasks listed in the widget are all incomplete. These may be tasks that are part of a transaction, or standalone tasks. Standalone tasks do not have a transaction name listed in the widget.
3. In the Tasks widget, locate the task you want to delete. If the task is not in the list (it is older), click **Go to Tasks** in the widget, and locate the task in the list.
4. Click the **Ellipses Menu** to display a dropdown.



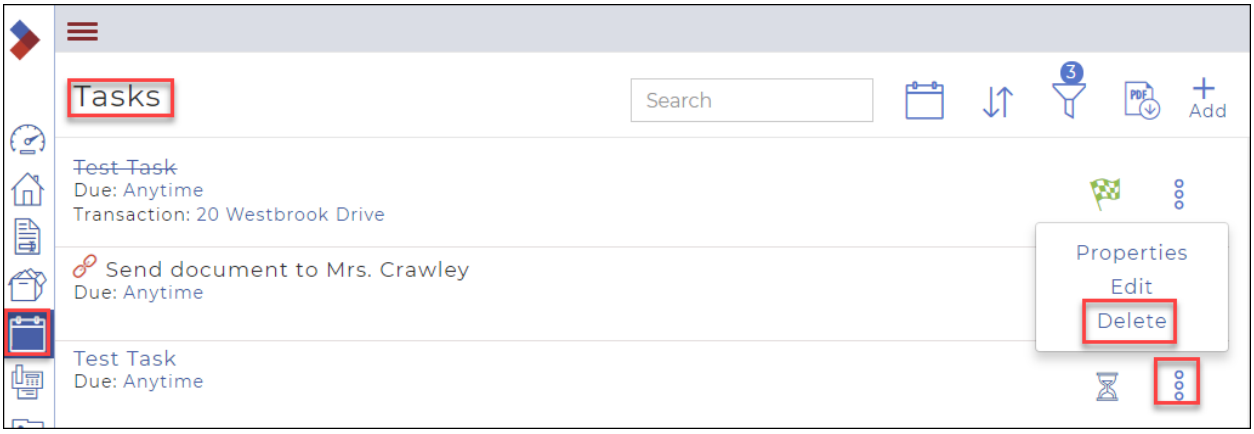
5. Click **Delete**.
   A confirm dialog box displays.



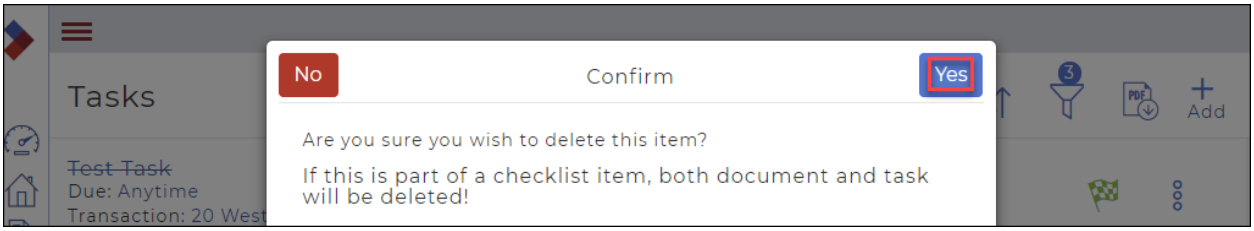
6. Click **Yes**.
   The task is deleted.

To delete a standalone task from the task manager:

1. In the sidebar, click **Tasks** .
   The **Tasks** window displays. These may be tasks that are part of a transaction, or standalone tasks. Tasks that are standalone do not have a transaction name listed.



2. Beside the task you want to delete, click the **Ellipses Menu** ⋮ to display a dropdown.
3. Click **Delete**.
   A **Confirm** dialog box displays.



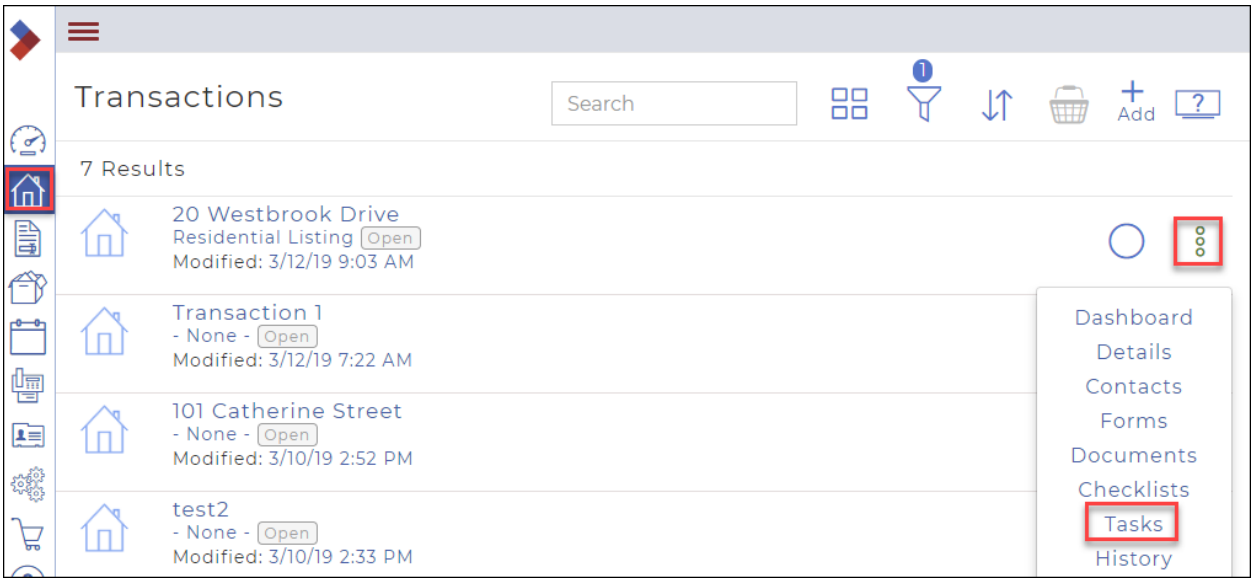
4. Click **Yes**.
   If the task has a document associated with it, the document is also deleted.

Deleting a task from a transaction

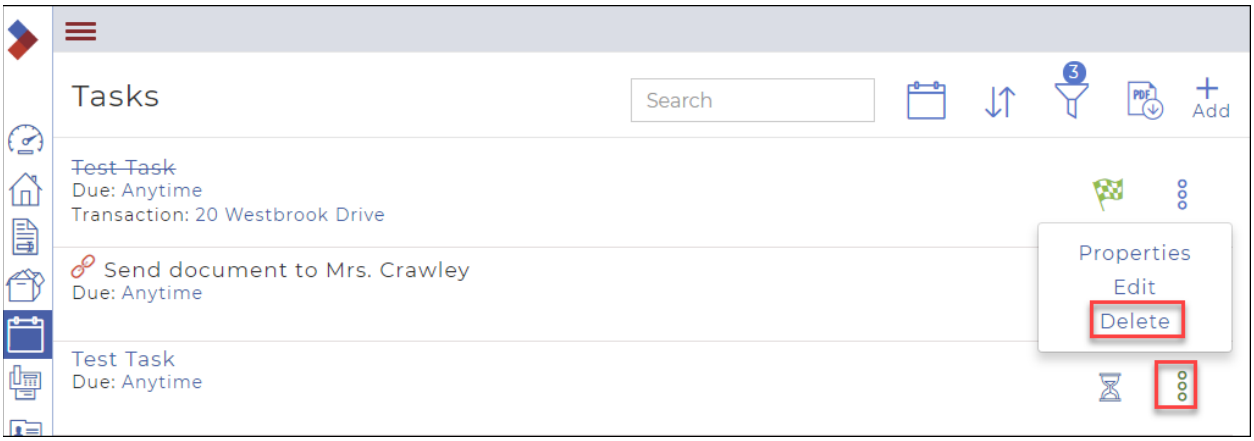
You may discover that you no longer need to complete a task, either a standalone task or a task that is part of a transaction.

To delete a task from a transaction:

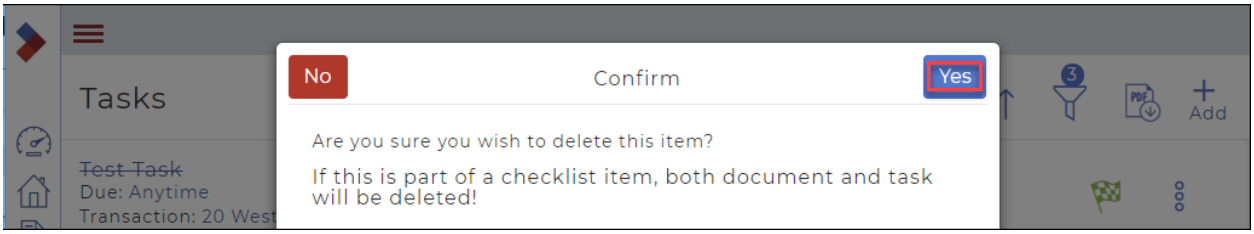
1. In the Sidebar, click **Transaction** .
   The **Transaction**s window displays the list of transactions.
2. Click the **Ellipses Menu** ⋮ beside the transaction the task is associated with.
   A dropdown displays.



3. Click **Tasks**.
   The list of tasks for the transaction displays.
4. Click the **Ellipses Menu** ⋮ beside the task you want to delete.
   A dropdown displays.



5. Click **Delete**.
   A **Confirm** message displays.



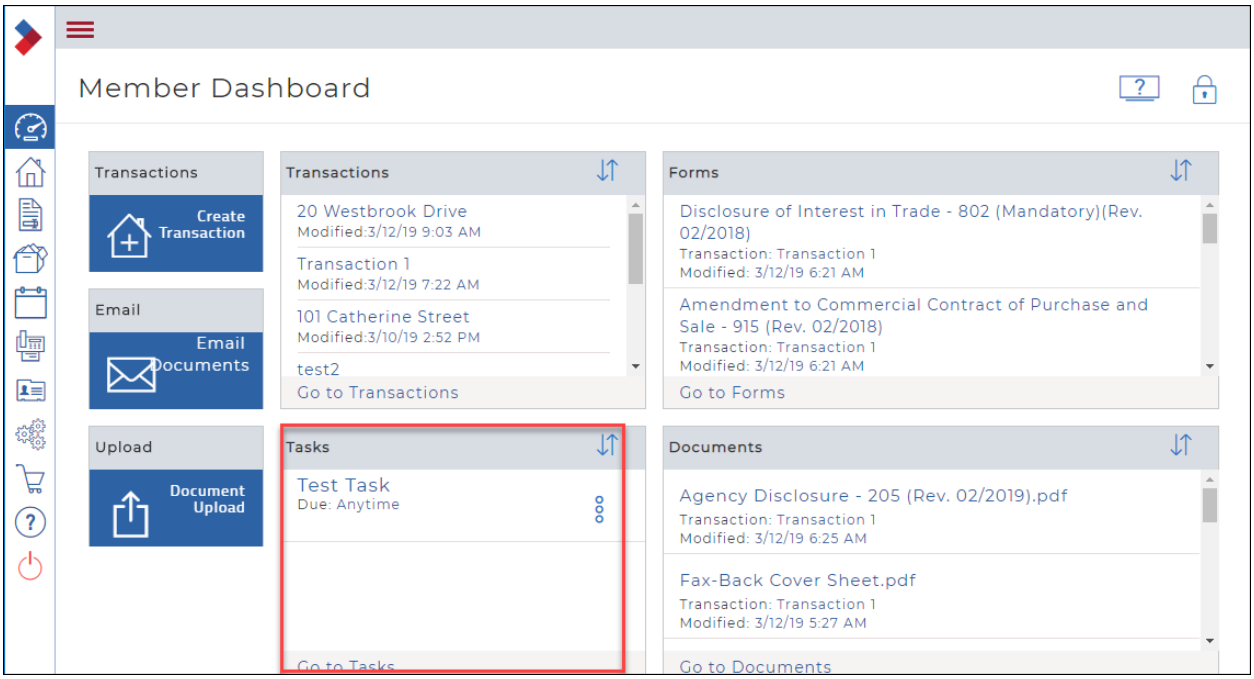
6. Click **Yes**.
   If the task has a document associated with it, the document is also deleted.

Viewing incomplete tasks

You may have tasks to complete that are associated with a transaction, either directly, or as part of a checklist. You may also have standalone tasks you want to track. When you look at the list of tasks, either in the Tasks widget in the dashboard, or in the Task Manager, you see all those types of tasks.

To view incomplete tasks from the member dashboard:

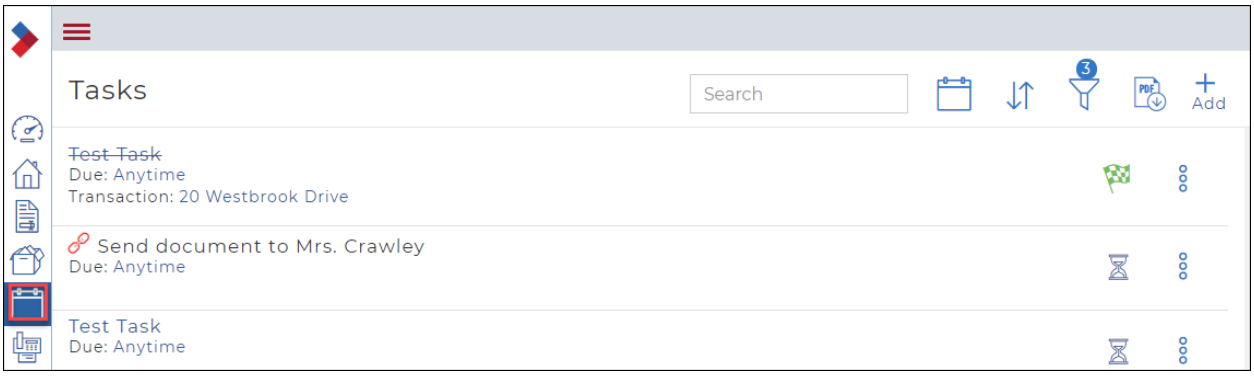
1. In the sidebar, click **Dashboard** .
   The **Member Dashboard** displays.



2. Ensure the **Tasks** widget is enabled. The tasks listed in the widget are all incomplete. These may be tasks that are part of a transaction, or standalone tasks. Tasks that are part of a transaction have the transaction name listed in the widget.

To view incomplete tasks from the task manager:

1. In the sidebar, click **Tasks** .
   The **Tasks** window displays. The list of all tasks displays. These may be tasks that are part of a transaction, or standalone tasks. Tasks that are part of a transaction have the transaction name listed in the widget.

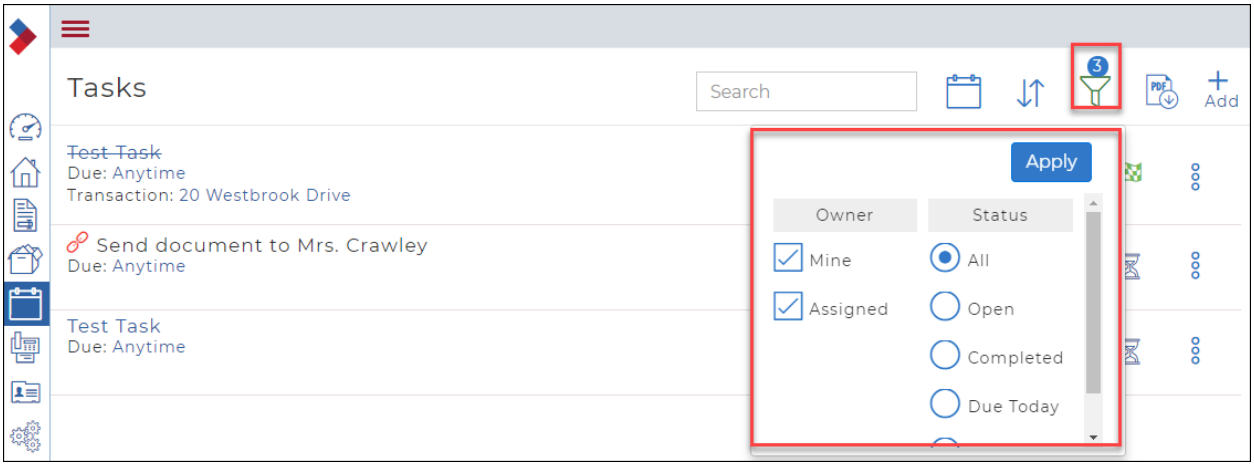


If the list of tasks is short, any tasks that do not have a strikethrough in the name are incomplete.

If the list of tasks is long, filter the list based on status.

To filter a list of tasks based on status:

1. In the **Tasks** window, click **Filter** .
   A dropdown menu displays.



2. In the **Status** column, select **Open**, and click **Apply**.
3. The list of incomplete tasks displays.

Creating a checklist

Having checklists for each of the key types of transactions you create can save you a lot of time. The checklist provides a list of things you need to do, or documents you need to gather to complete a deal. Checklist items can be mandatory or optional.

There are two ways to create a checklist:

- Create a new checklist
- Copy an existing checklist

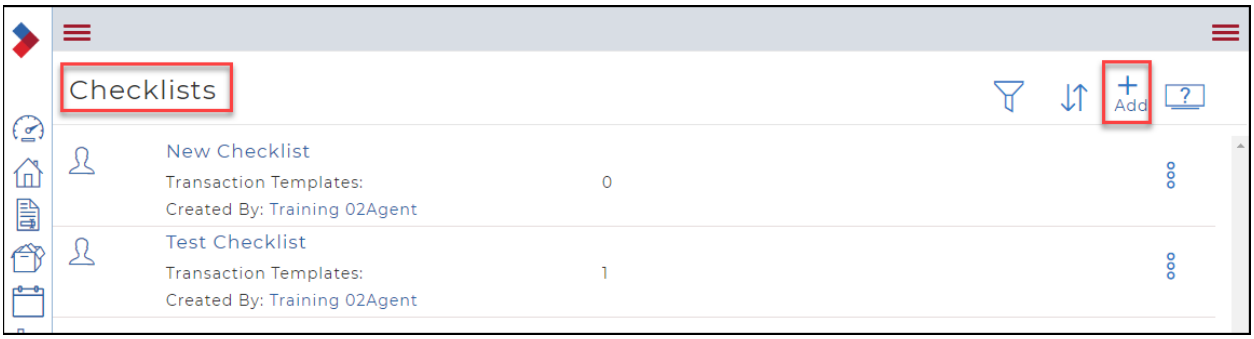
If you already have a checklist that has some of the characteristics you want your new checklist to have, it may be simpler to copy an existing checklist, and then change it to meet your needs.

CLICK TO VIEW VIDEO

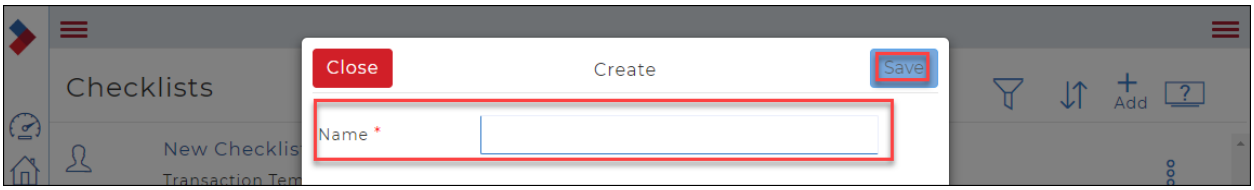
To create a new checklist:

1. In the Sidebar, click **Setup** .
   The list of options displays.

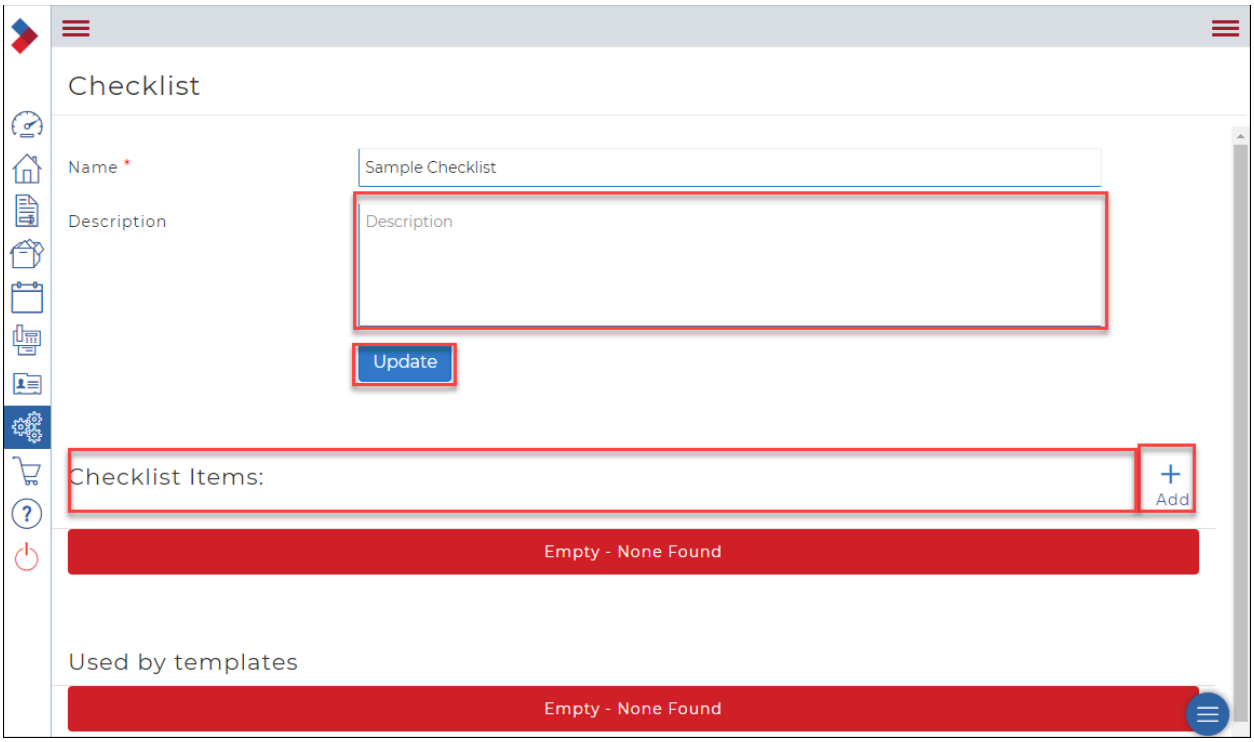
2. Click **Checklist Manager**.
   The Checklists window displays.



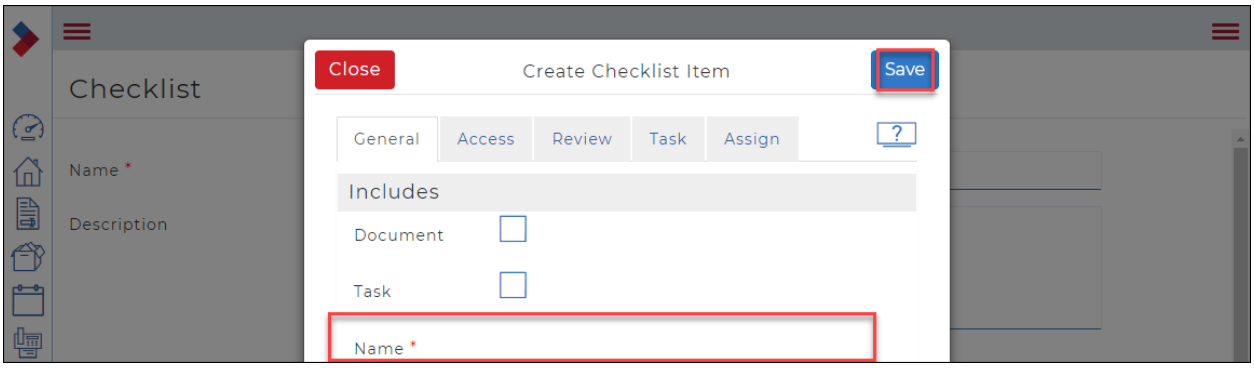
3. Click **Add**.
   The Create dialog box displays.



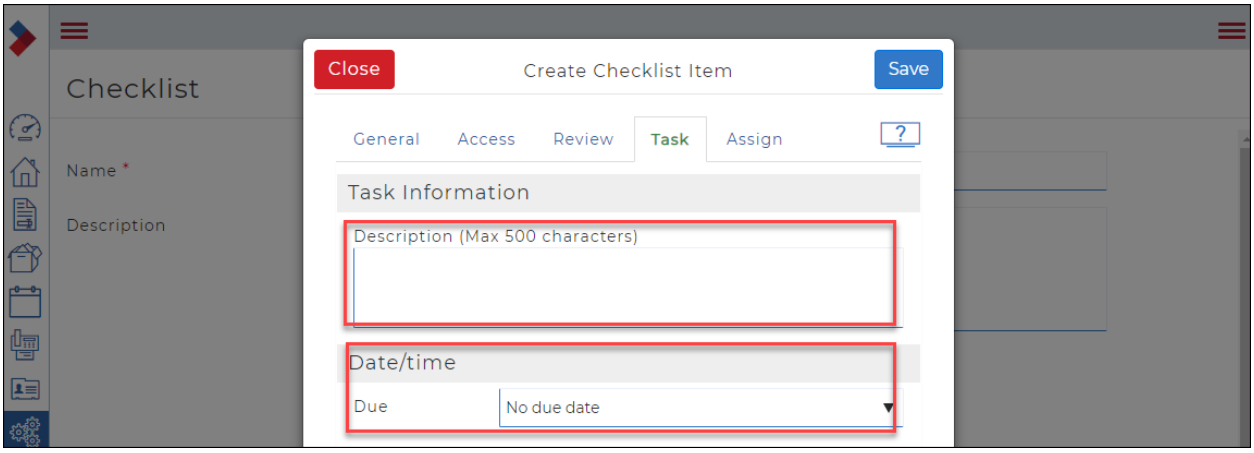
4. In the **Name** field, give the checklist a meaningful name.
5. Click **Save.**
   The checklist is created, and you can now add the details to the list.



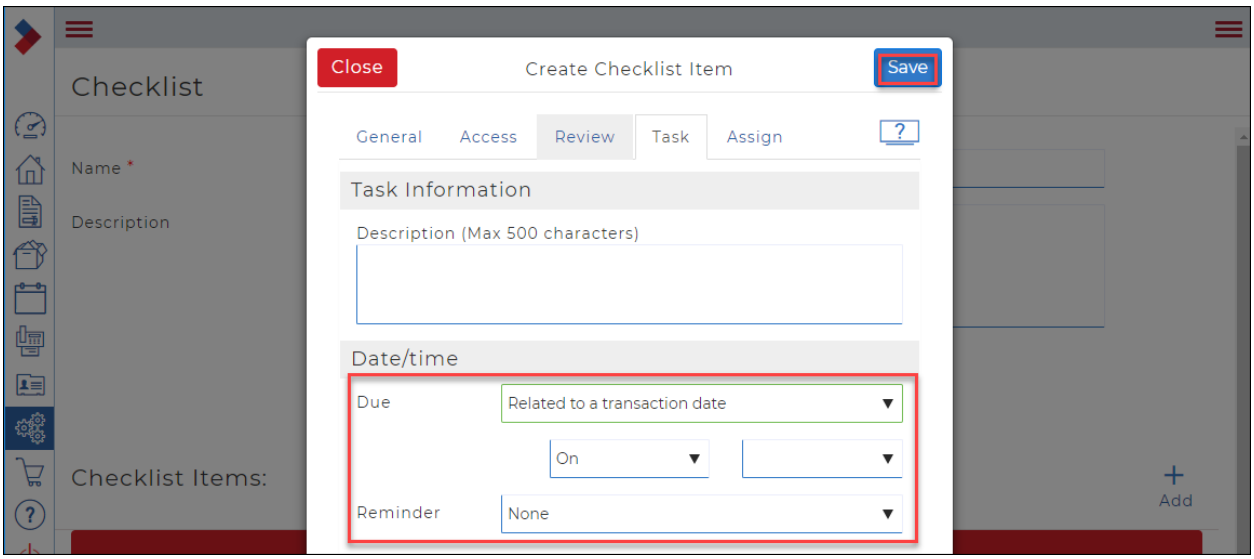
6. Optional: In the **Description** field, enter a description of the checklist.
7. In the **Checklist Items** section, click **Add**.
   The **Create Checklist Item** displays.



8. Do one of the following:
   a) If this checklist item is a task, check **Task**.
   b) If this checklist item is a task that also requires a document, check both **Task** and **Document**.
   c) If this checklist item is to add a document, check **Document**.
9. In the **Name** field, give the checklist item a meaningful name.



10. If the checklist item is a task, you can do the following:
    a) Click the **Task** tab and specify a description of the task.
    b) In the **Date/time** section, add a due date for the task. You can relate it to a transaction date and set it to be due before or after a date, and a due date for the task.



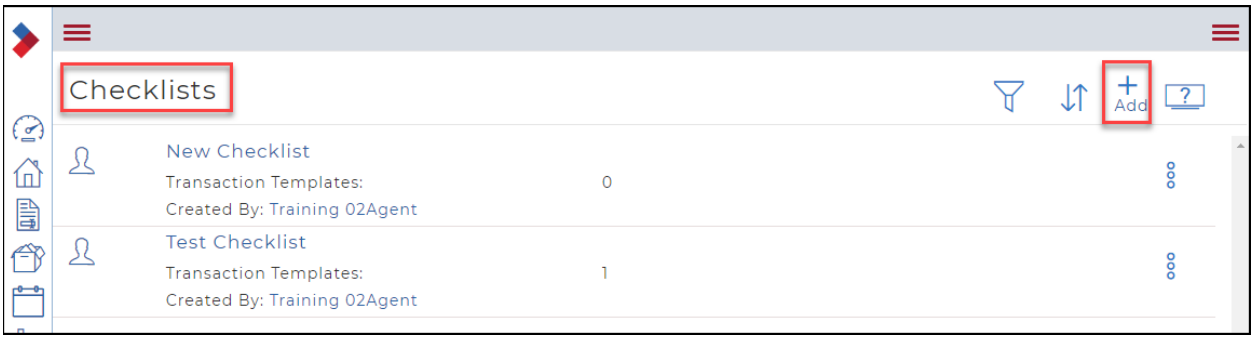
11. When you have finished creating the checklist item, click **Save**.
12. Repeat steps 7 through 12 to create all the items in the checklist.
13. When you have finished creating the checklist, click **Update**.

Creating a checklist by copying an existing checklist

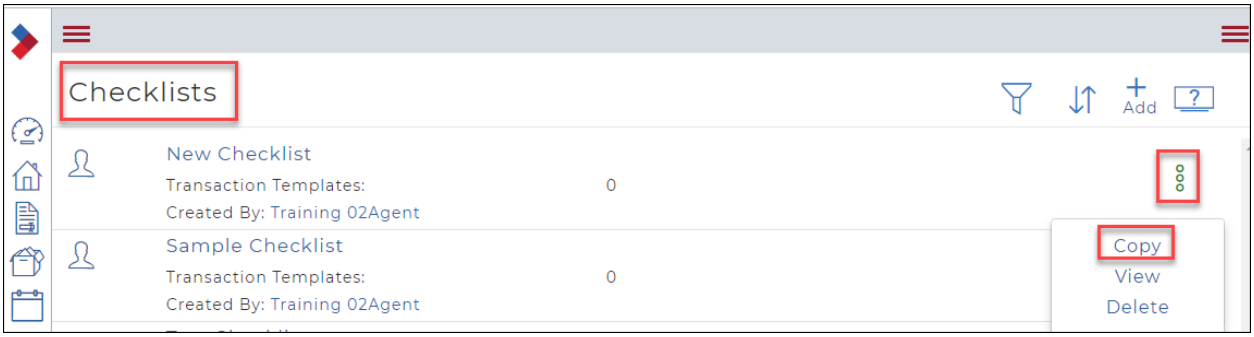
To create a new checklist:

1. In the Sidebar, click **Setup** .
   The list of options displays.

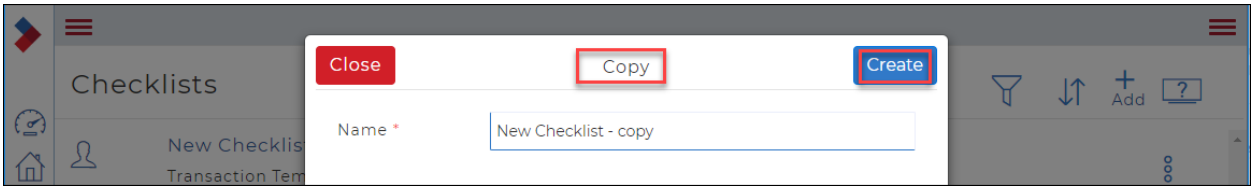
2. Click **Checklist Manager**.
   The Checklists window displays.



3. Click the **Ellipses Menu** ⋮ to the right of the checklist you want to copy, to display a dropdown.



4. Click **Copy**.
   A **Copy** dialog box displays.



5. In the **Name** field, give the copied checklist a meaningful name. Remember to remove the word ‘copy’ from the name.
6. Click **Create**.

The checklist is added to the list of checklists. Edit the checklist to make any changes you require.

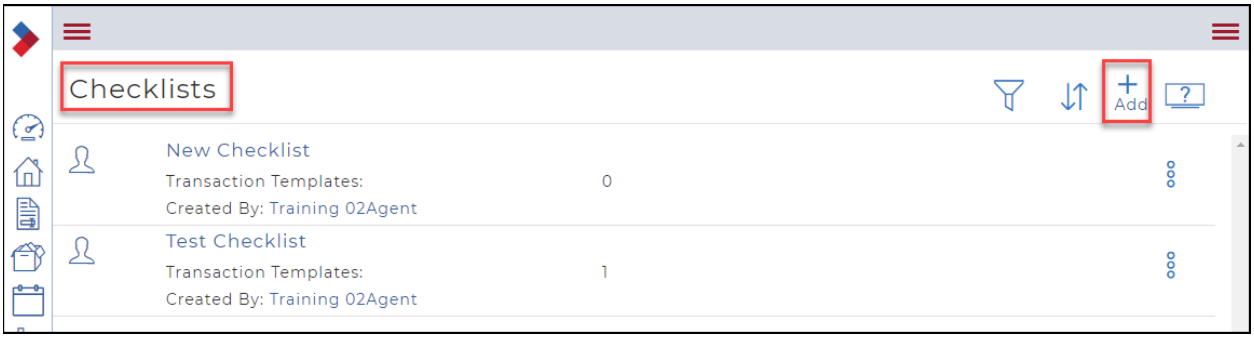
Editing a checklist

You may have a checklist with a task in it that now requires a document. You can edit the checklist to change the checklist item to include a document.

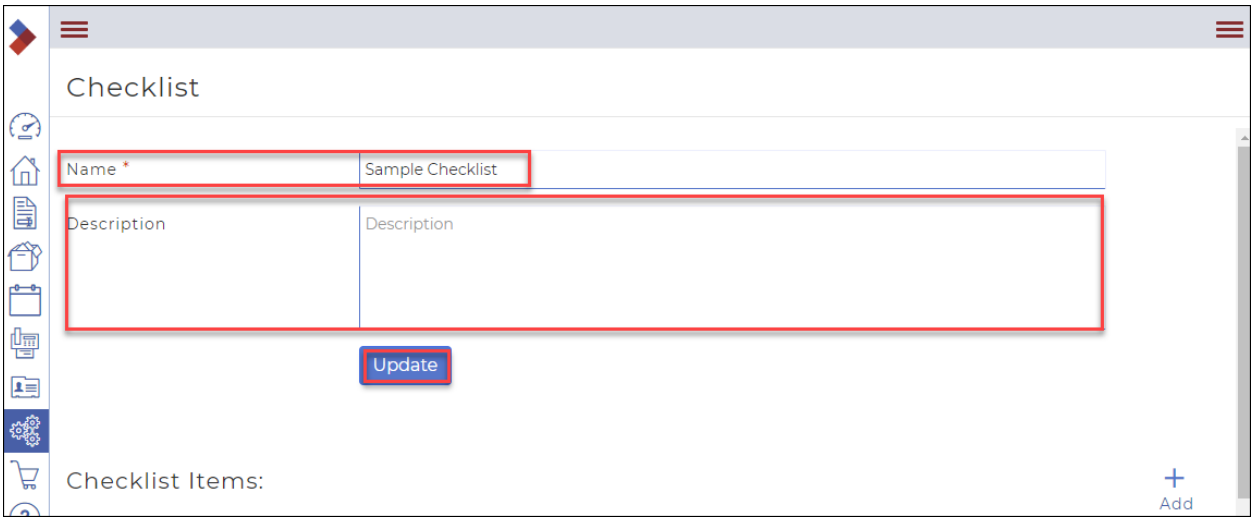
To edit a checklist:

1. In the Sidebar, click **Setup** .
   The list of options displays.

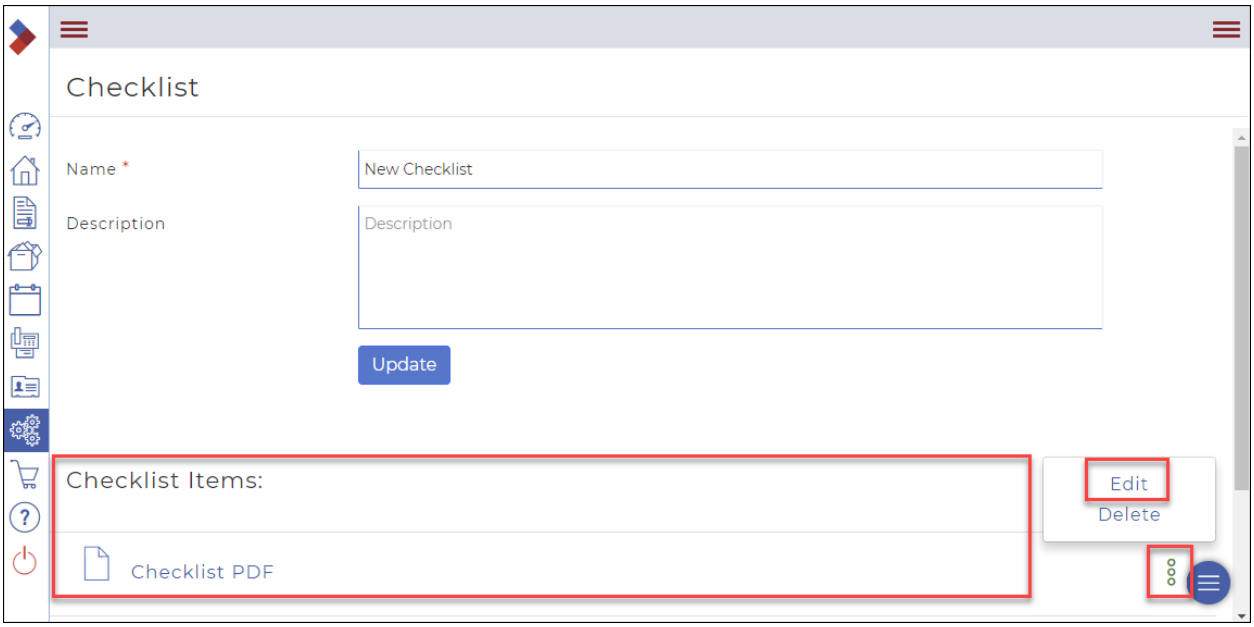
2. Click **Checklist Manager**.
   The Checklists window displays.



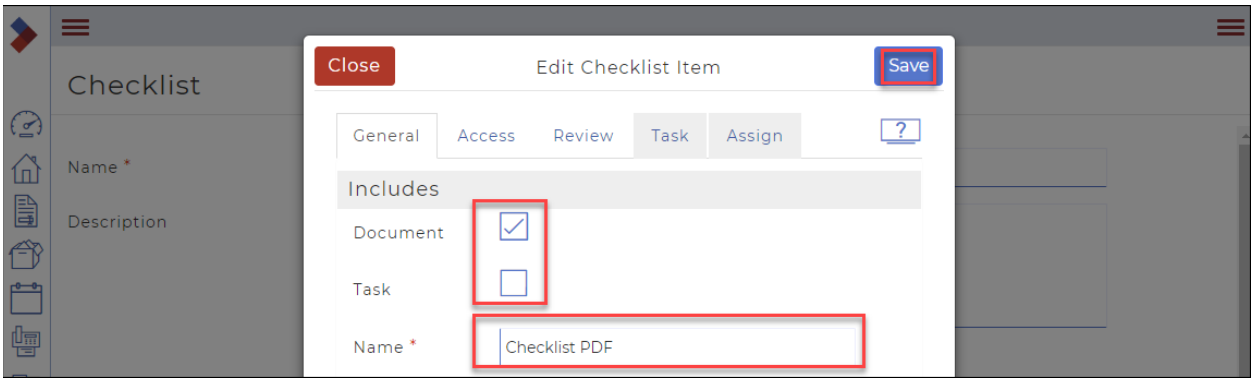
3. Click the name of the checklist you want to edit.
   The **Checklist** window displays.



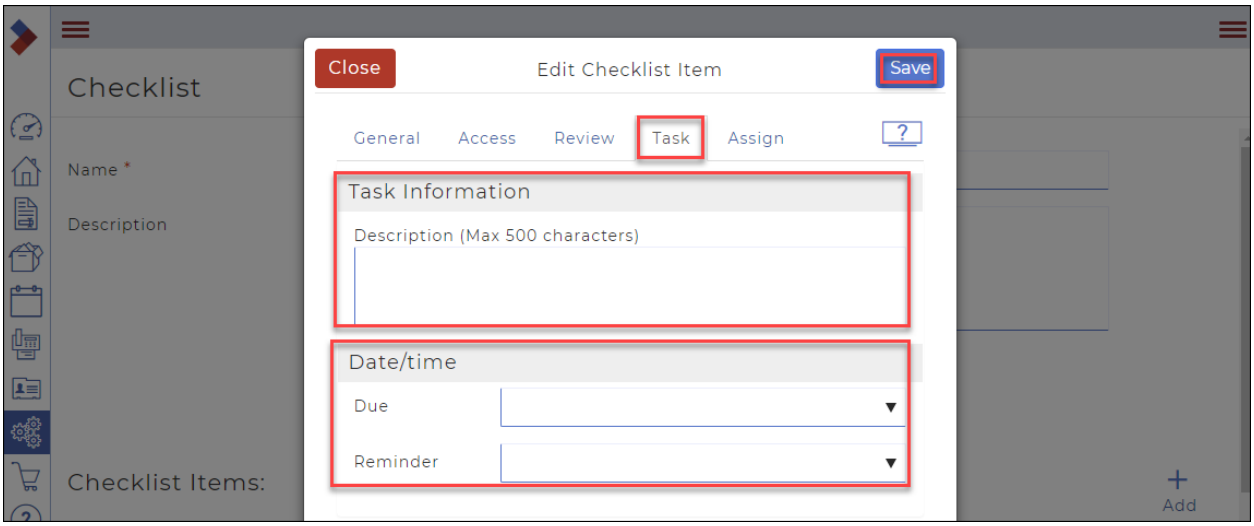
4. To edit the name of the checklist, click in the **Name** field, make your changes, and click **Update**.
5. To edit the description of the checklist, click in the **Description** field, make your changes, and click **Update**.
6. To edit a checklist item, click the **Ellipses Menu** beside the item name to display a dropdown.



7. Click **Edit**.
   The **Edit Checklist Item** dialog box displays.



8. Use the checkboxes on the **General** tab to make changes such as adding a task, adding a document, or making the item mandatory or optional. You can also change the item name to reflect the changes you make.
9. Click **Save** to save your changes and close the dialog box.



10. Click the **Task** tab to make changes to the task.
11. Click **Save** to save your changes and close the dialog box.

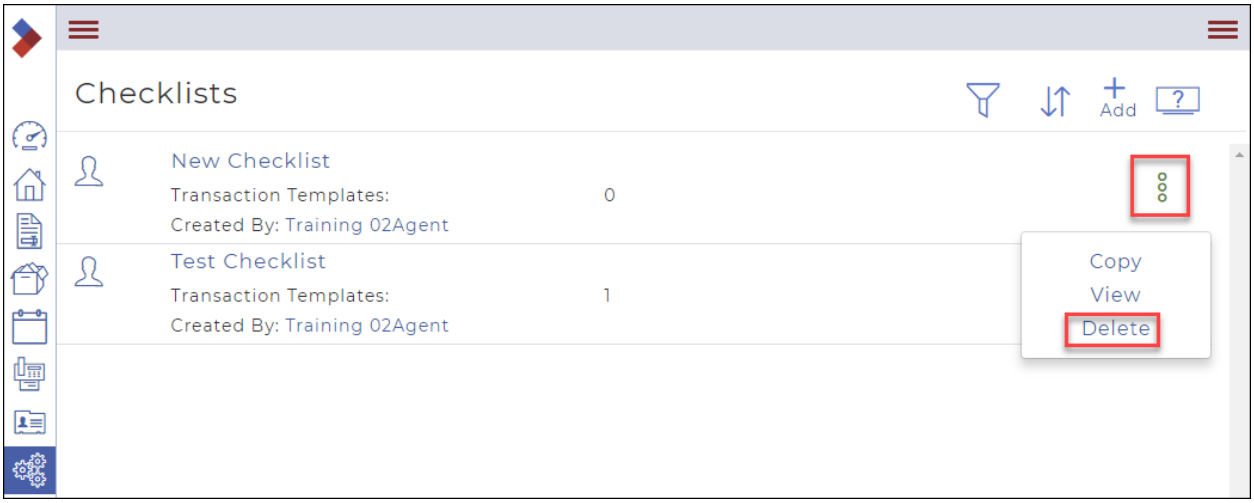
Deleting a checklist

If a checklist is no longer working for you, or no longer required, you can delete it.

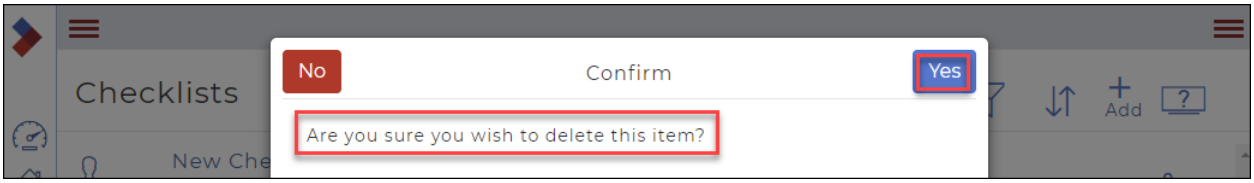
To delete a task:

1. In the Sidebar, click **Setup** .
   The **Setup** menu displays.

2. Click **Checklist Manager**.
   Your list of checklists displays.



3. Click the **Ellipses Menu** ⋮ to display a dropdown menu.
4. Click Delete.
   A Confirm dialog box displays, asking "Are you sure you wish to delete this item?"



5. Click **Yes**.
   Your checklist is now deleted.

Working in Teams/Sharing Groups

Many brokerages have teams of agents that work together on some or all deals. Before agents can share transactions in the system, the agents must be added to the same "team" or "sharing group".

This section includes:

[Creating a team/sharing group]

[Editing a team/sharing group]

[Sharing a document folder with your team/sharing group]

[Sharing a document with your team/sharing group]

[Sharing a transaction with your team/sharing group]

[Sharing a transaction template with your team/sharing group]

Creating a team/sharing group

Before agents can share transactions in the system, the agents must be added to the same “sharing group”. You can create a sharing group or team and add or remove agents as needed.

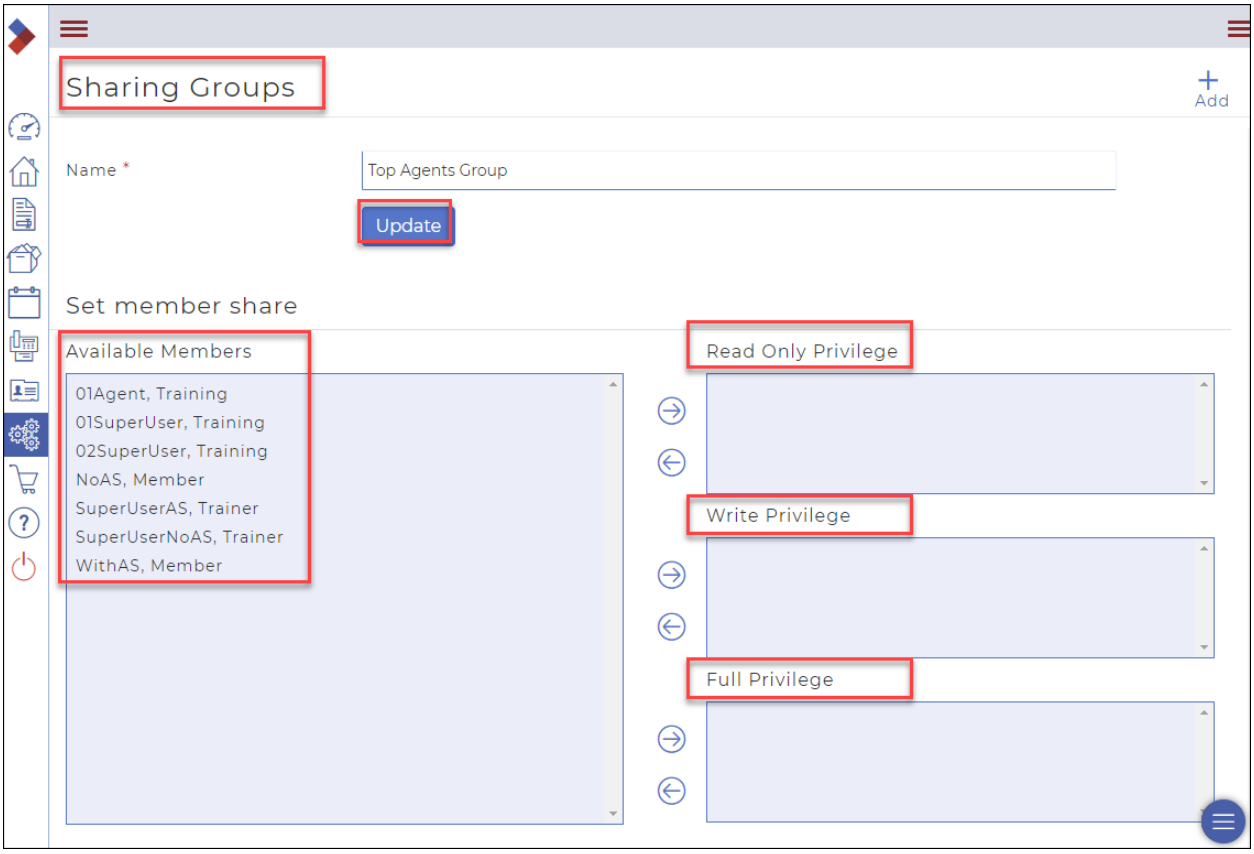
To create a team:

1. In the Sidebar, click **Setup** .
   The **Setup** window displays a list of actions.

2. Click **Sharing**.
   The **Sharing Groups** window displays a list of groups.

3. Click **Add**.
   The **Create** dialog box displays.

4. In the **Name** field, enter a name for the group.
5. Click **Save**.
   A window displays the properties of the group.



6. from the list of **Available Members**, select one or more agents and assign them the appropriate privileges by clicking the right arrow next to the privilege you want the user(s) to have.
   Do one of the following:
   - To give a member read-only access to transactions, assign them **Read Only Privilege**.
   - To give a member write access to transactions, so they can update them, but not allow them to delete transactions, assign them **Write Privilege**.
   - To give a member full read/write/delete access to transactions, assign them **Full Privilege**.
7. When you have finished adding members with the appropriate privileges, click **Update**.

Editing a team/sharing group

CLICK TO VIEW VIDEO

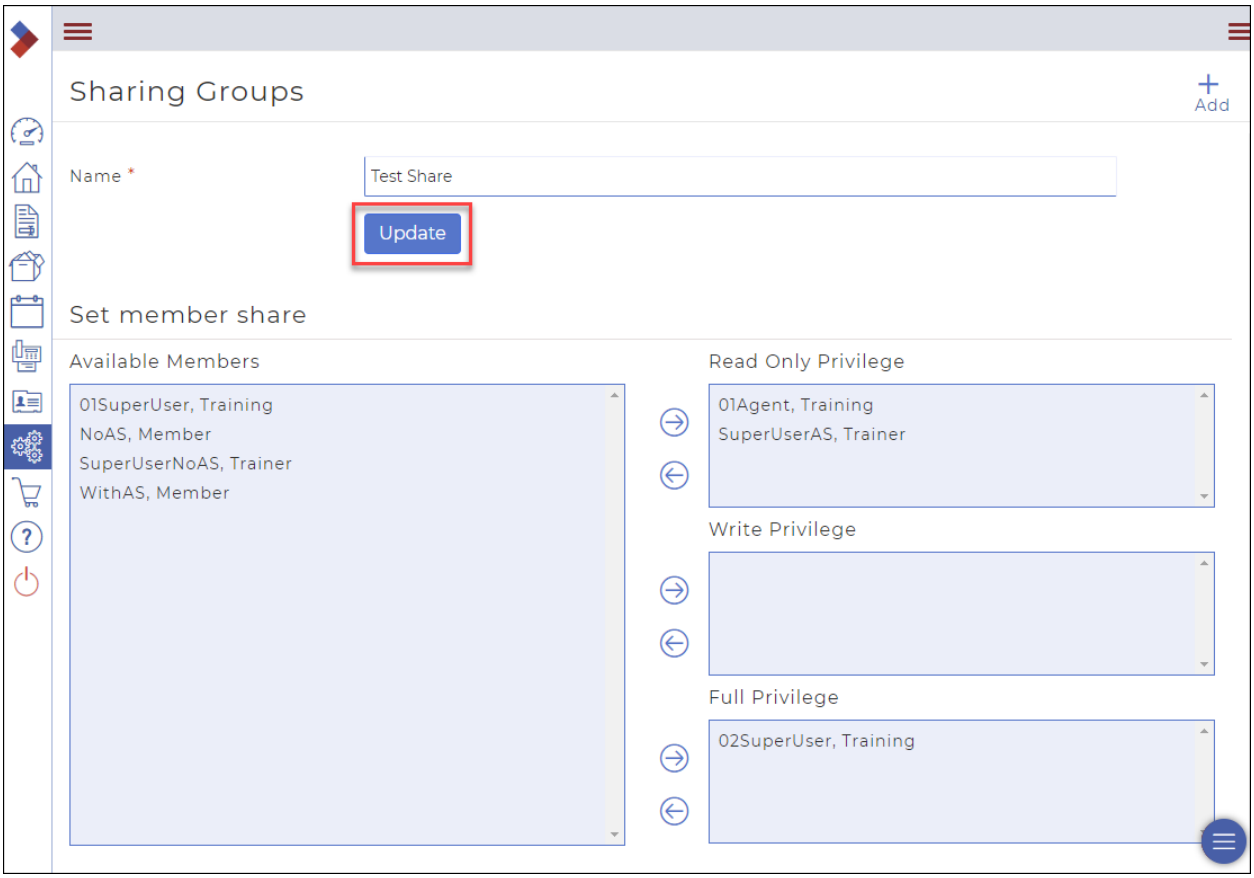
To edit a team:

1. In the Sidebar, click **Setup** .
   The **Setup** window displays a list of actions.

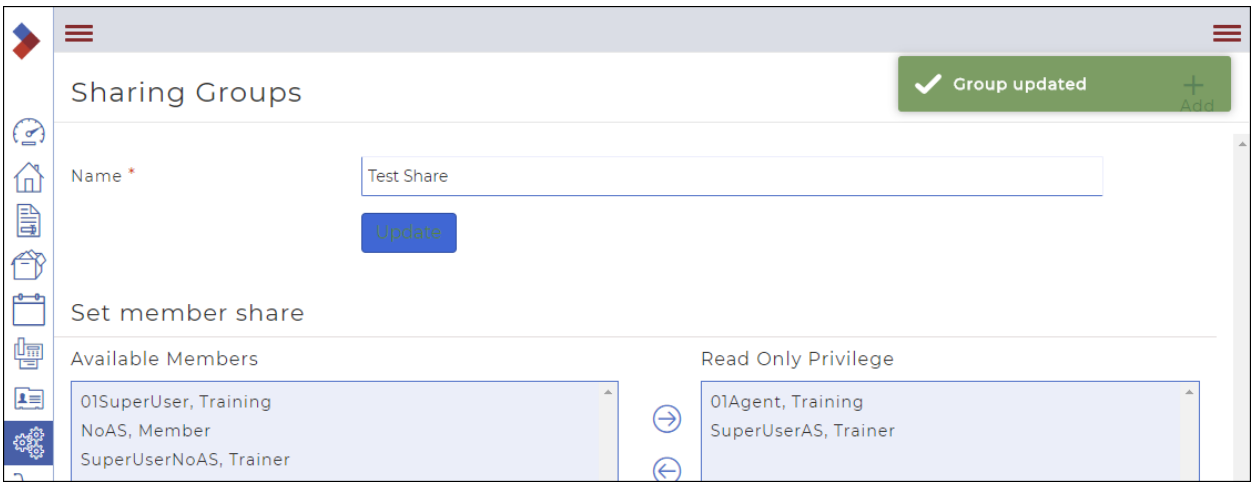
2. Click **Sharing**.
   The **Sharing Groups** window displays a list of groups.

3. Click the **Ellipses Menu** .
   The dropdown menu displays.

4. Click **Edit**.
   The **Sharing Groups** window displays.



5. Make any desired edits.
6. Click **Update**.
   A confirmation message briefly appears in the top right.



Sharing a document folder with your team/sharing group

In order to share documents with your teammates, you need to create a document folder that is shared with your team.

> *Note: Before you can share a document folder with your team, the team, or sharing group must first be created.*

CLICK TO VIEW VIDEO

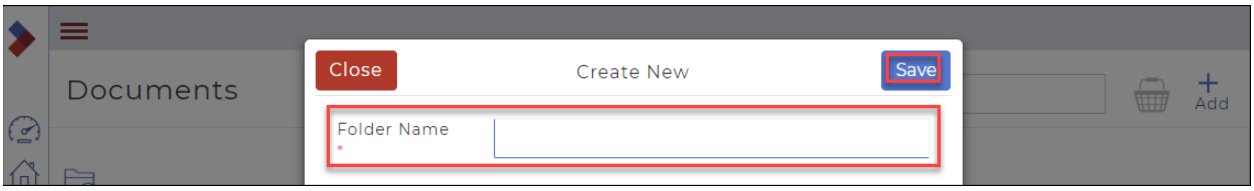
To share a document folder with your team:

1. In the Sidebar, click **Documents** .
   The **Documents** window displays.

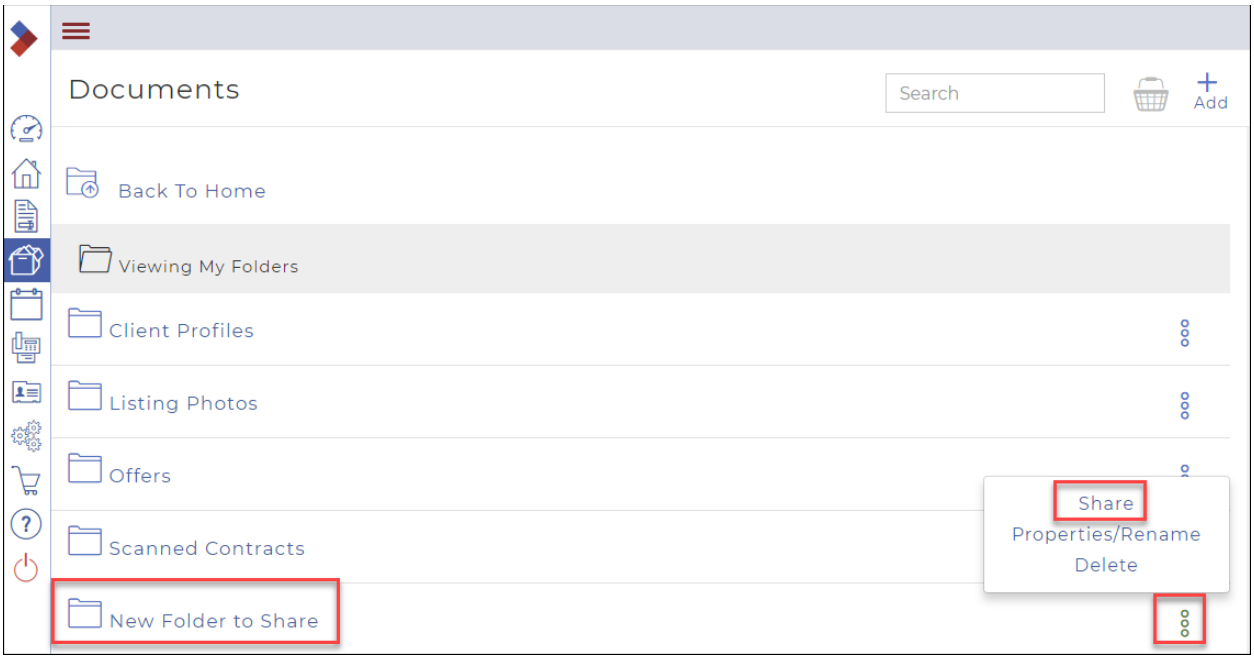
2. Click **My Folders**.
   The subfolders under **My Folders** display.

3. Click **Add**.
   A dropdown displays options.

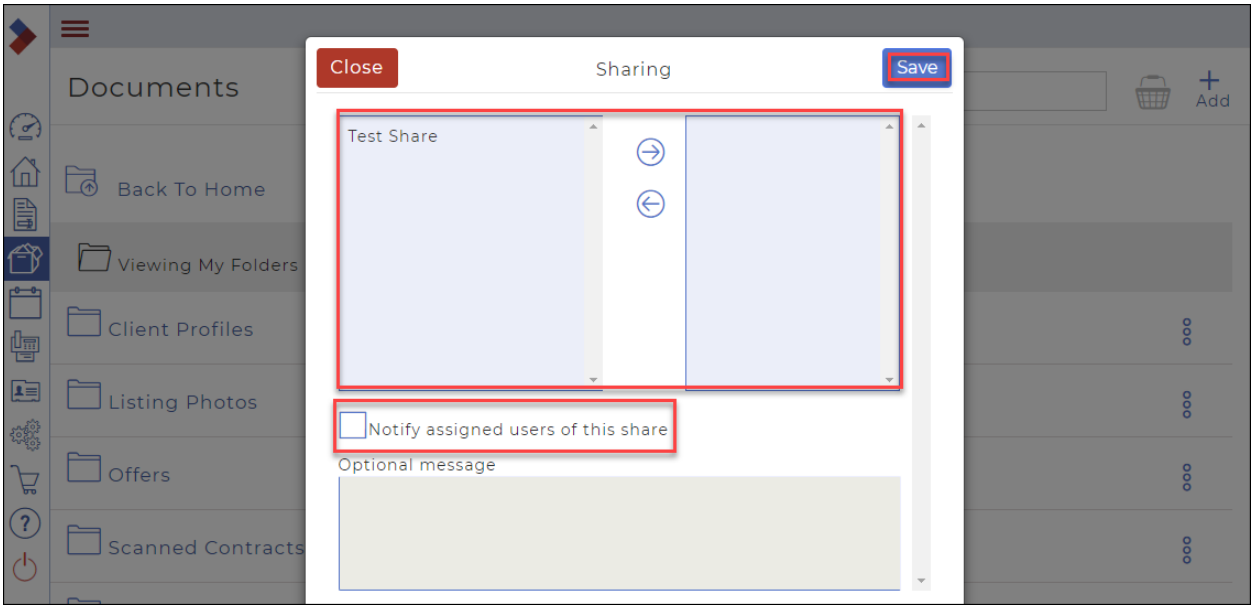
4. Click **Add new folder**.
   The **Create New** dialog box displays.



5. In the **Folder Name** field, give the folder a meaningful name.
6. Click **Save**.
   The folder is added to your list of folders.
7. Click the **Ellipses Menu** to the right of the folder name to display a dropdown.



8. Click **Share**.
   The **Sharing** dialog box displays.



9. from the list of teams in the left, select the team to share with, and click the right arrow to add it to the list of groups to share with.
10. To automatically notify teammates about the shared folder, check **Notify assigned users of this share**.
11. Click **Save**.

Sharing a document with your team/sharing group

In order to share documents with your teammates, the documents must be in either your Inbox or My Folders.

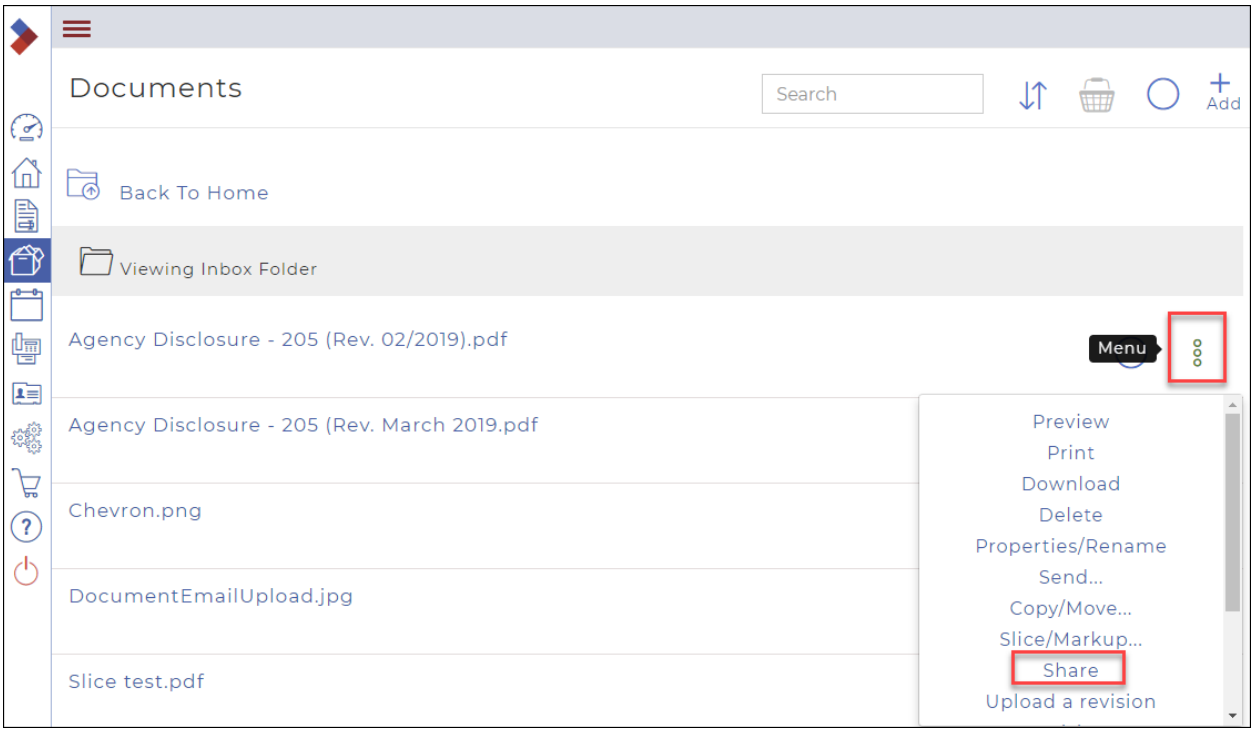
Note: Before you can share a document with your team, the team, or sharing group must first be created.

CLICK TO VIEW VIDEO

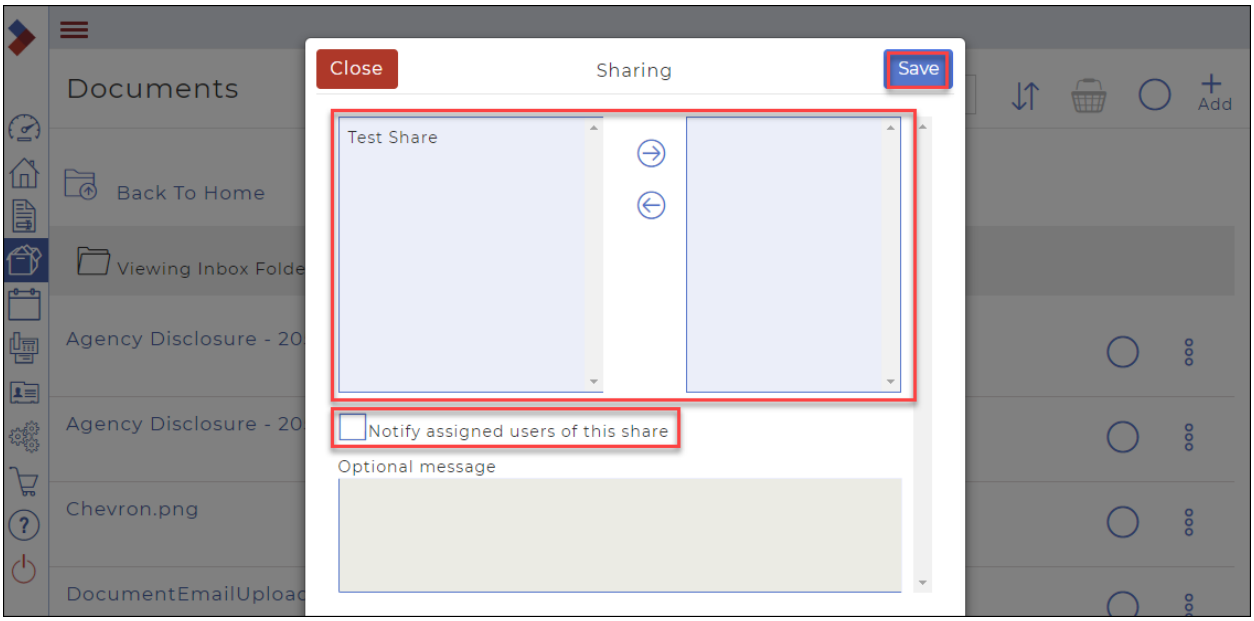
To share a document with your team:

1. In the Sidebar, click **Documents** .
   The **Documents** window displays.

2. Click either **Inbox Folder** or **My Folders**. In this example we chose **Inbox Folder**.
   The documents in the **Inbox Folder** display.



3. Click the **Ellipses Menu** ⋮ beside the document you want to share.
   A dropdown displays options.
4. Click **Share**.
   The **Sharing** dialog box displays.



5. from the list of teams in the left, select the team to share with, and click the right arrow to add it to the list of groups to share with.
6. To automatically notify teammates about the shared document, check **Notify assigned users of this share**.
7. Click **Save**.
   The document displays in the **Shared Documents** folders of your teammates.

Sharing a transaction with your team/sharing group

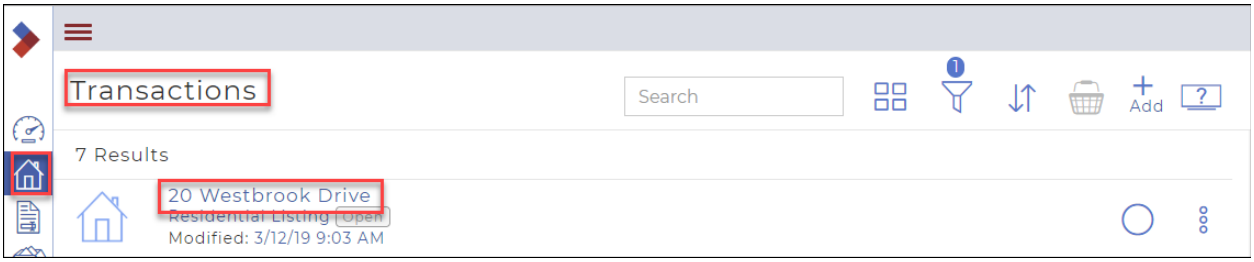
If you are working as part of a team that shares deals, you need to share a transaction with your teammates.

Note: Before you can share a transaction with your team, the team, or sharing group must first be created.

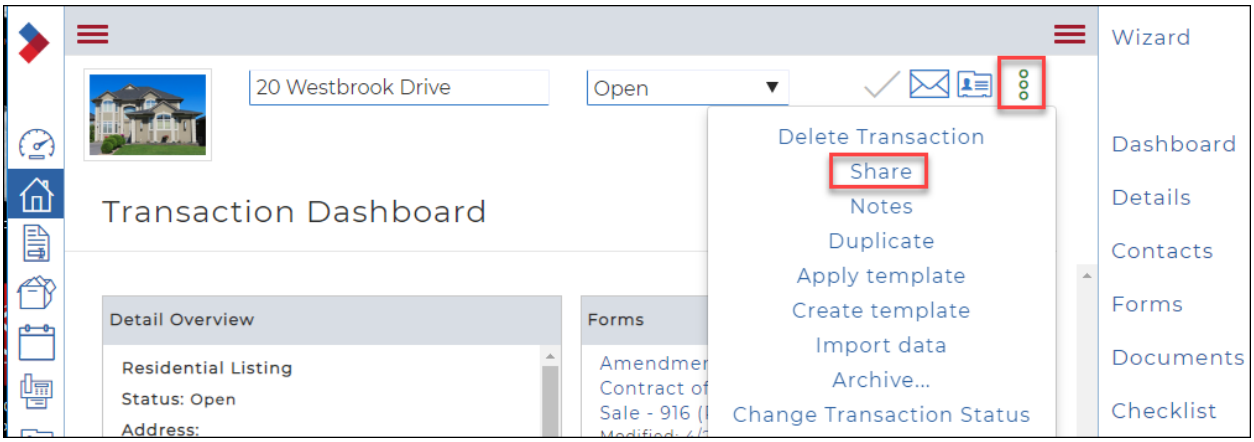
CLICK TO VIEW VIDEO

To share a transaction with your team:

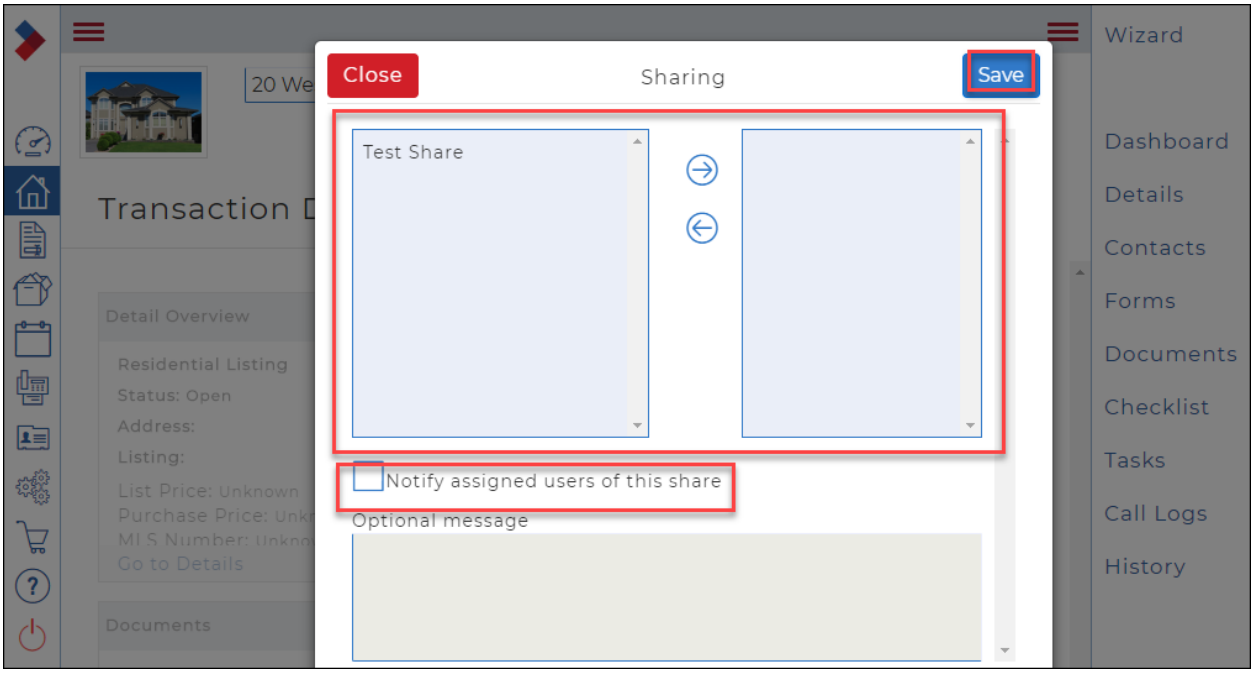
1. In the Sidebar, click **Transaction** .
   The **Transactions** window displays.



2. Click the name of the transaction you want to share.
   The **transaction dashboard** displays.



3. Click the **Ellipses Menu** to the right of the transaction name field to display a dropdown.
4. Click **Share**.
   The **Sharing** dialog box displays the list of teams with which you can share.



5. from the list of teams in the left, select the team to share with, and click the right arrow to add it to the list of groups to share with.
6. To automatically notify teammates about the shared transaction, check **Notify assigned users of this share**.
7. Click **Save**.

Sharing a transaction template with your team/sharing group

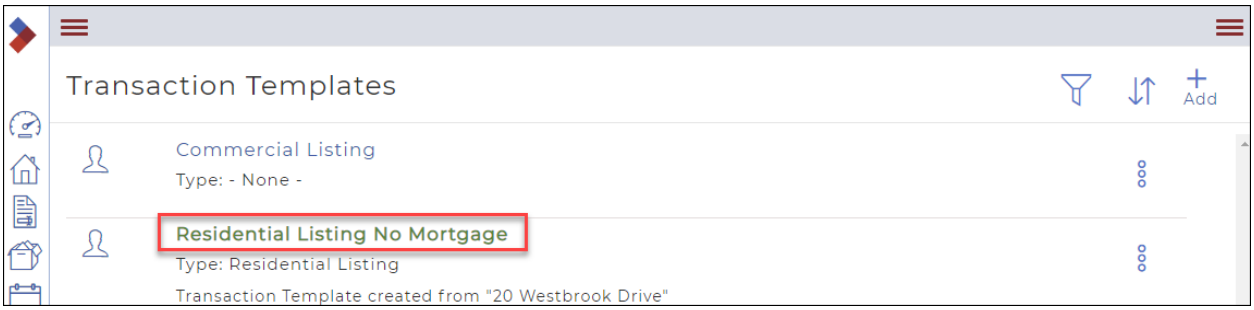
You can create a transaction template and share it with your teammates. When you share a transaction template, the transaction template itself is not made available to your teammates: transactions you create using the template are automatically shared to those listed in the sharing group in the template.

Note: You require Brokerage Owner access to make a template available to the entire office.

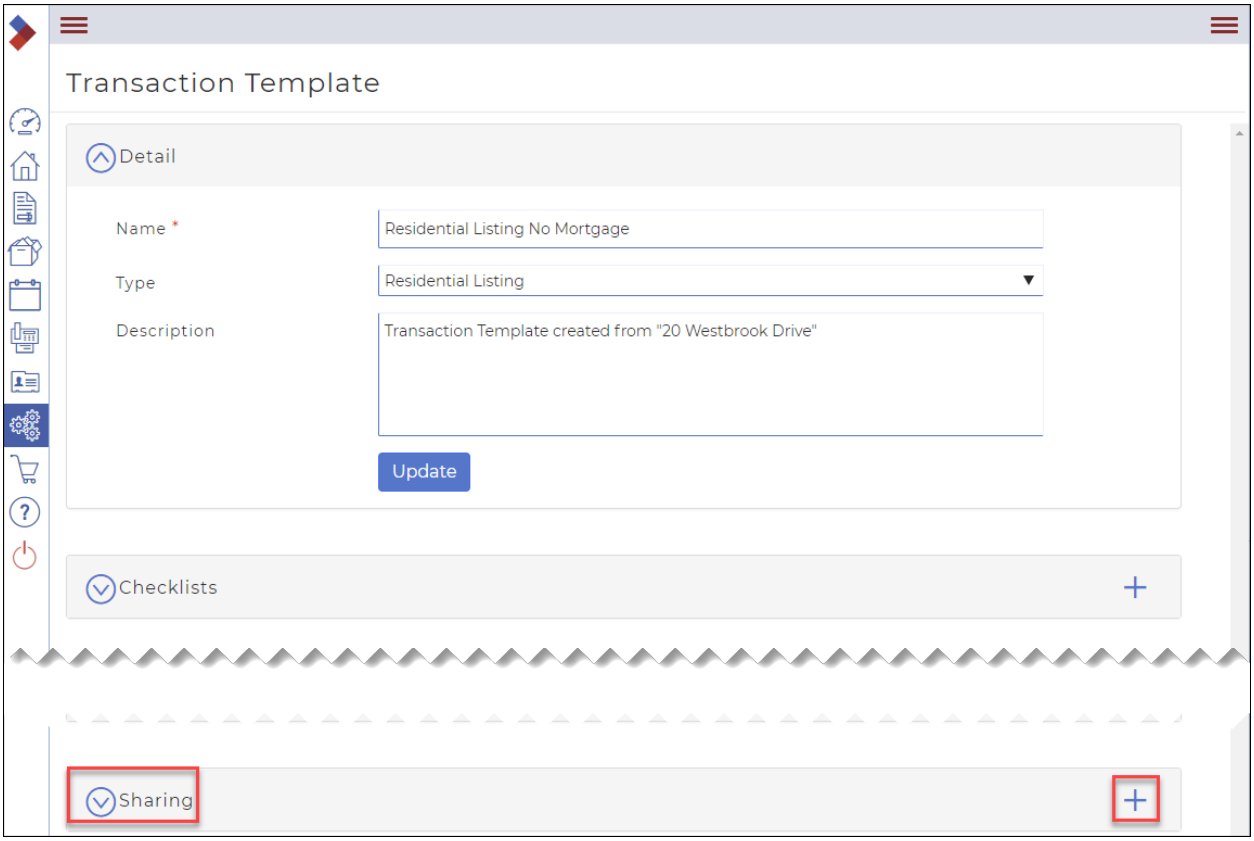
To share a transaction template with your team:

1. In the Sidebar, click **Setup** .
   The **Setup** options display.

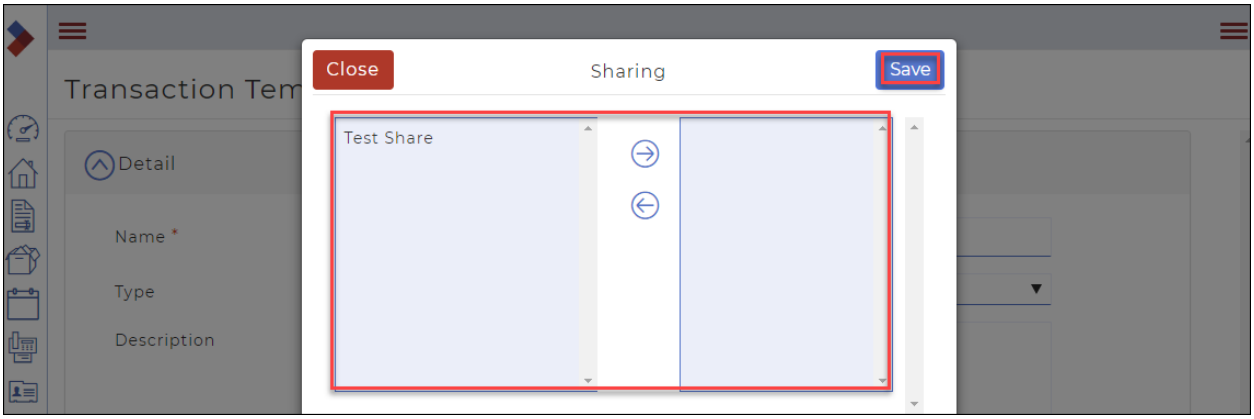
2. Click **Transaction Templates**.
   The **Transaction Templates** window displays.



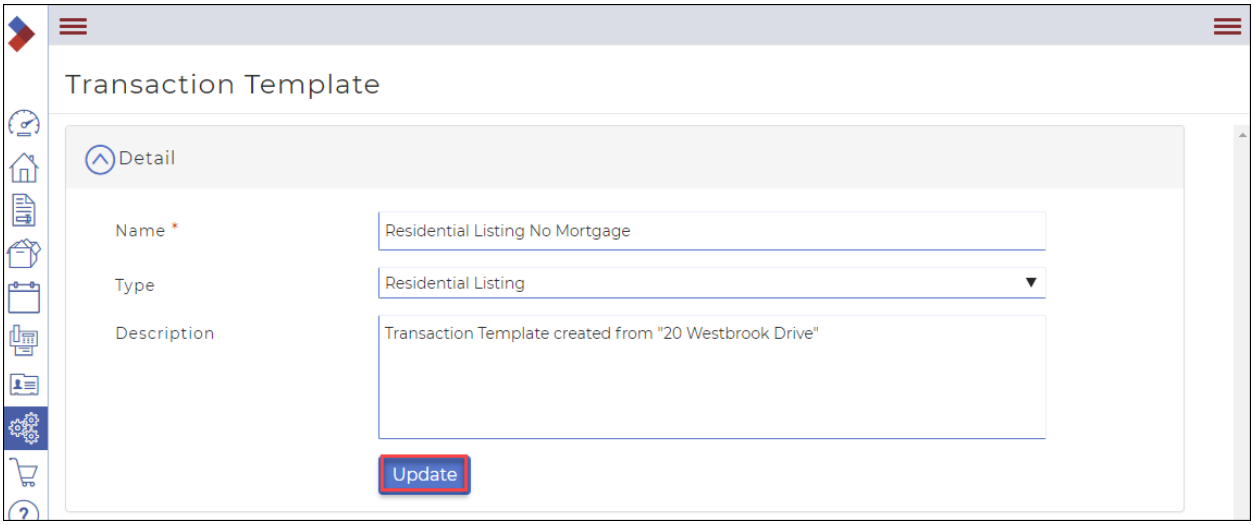
3. Click the name of the transaction template you want to share to open the template.
   The **Transaction Template** opens.



4. If you want to share the transaction template with your team, scroll down to the **Sharing** section, and click +.
   The **Sharing** dialog box displays, with a list of the groups you belong to.



5. Select the group you want to share with on the left, then click the right arrow to add the group to the list to share with.
6. Click **Save.**
7. Click **Update**.



Section D: Setting up your profile and system

[Setting up your profile](#)

[Configuring program settings](#)

[Setting up notifications](#)

[Setting up service providers](#)

[Linking to an esignature provider](#)

[Managing types](#)

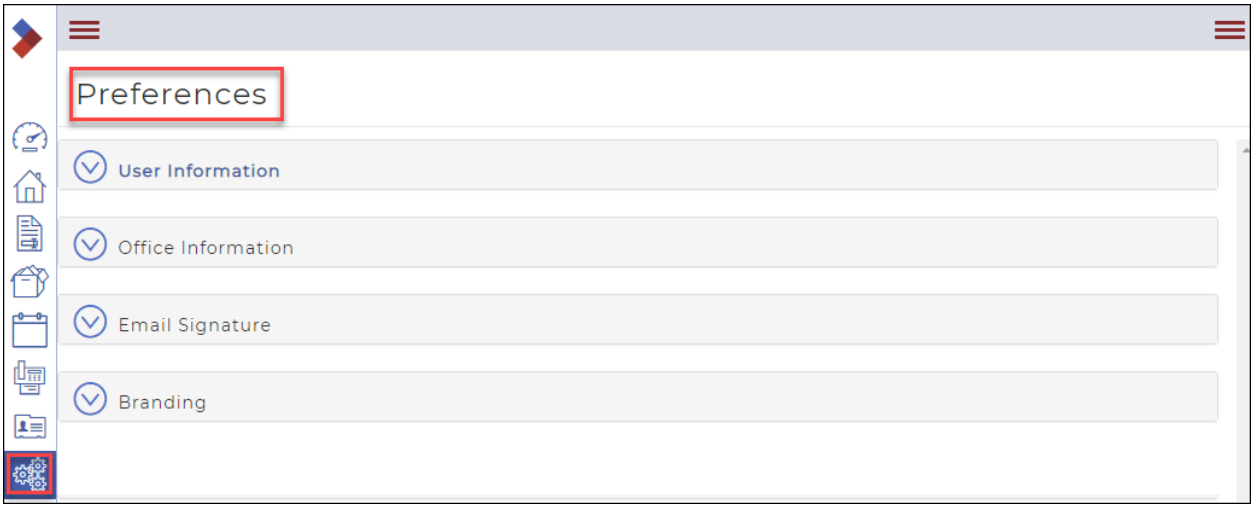
Setting up your profile

Use your user profile to customize your personal information contained in the system, such as your user name, phone number, profile photo, email address, email signature, and password.

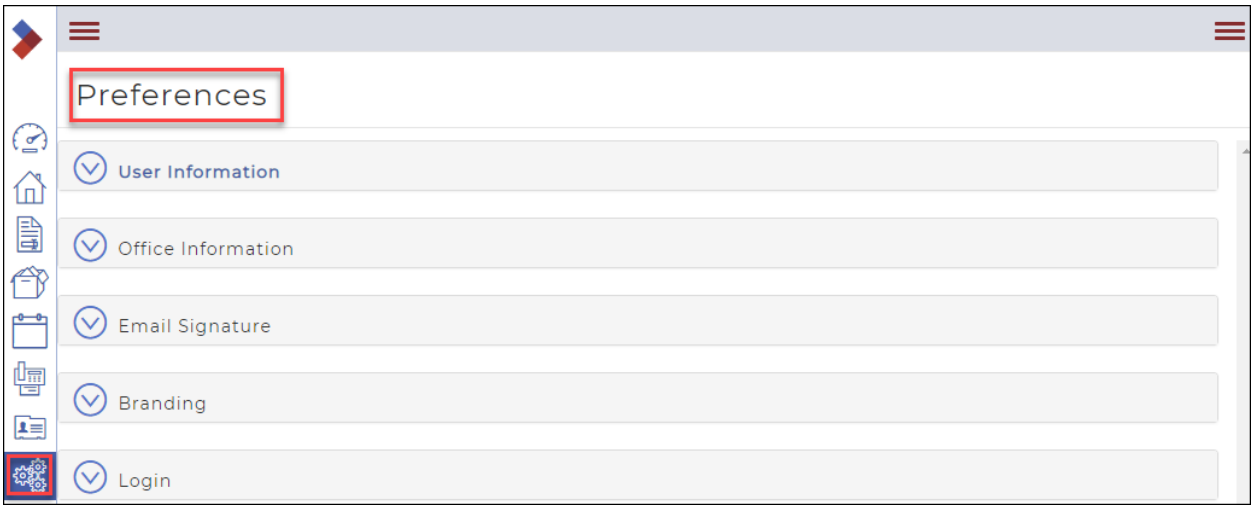
Note: Some of the fields are automatically populated with information from your Board's MLS® Systemand are therefore not editable.

To set up your profile:

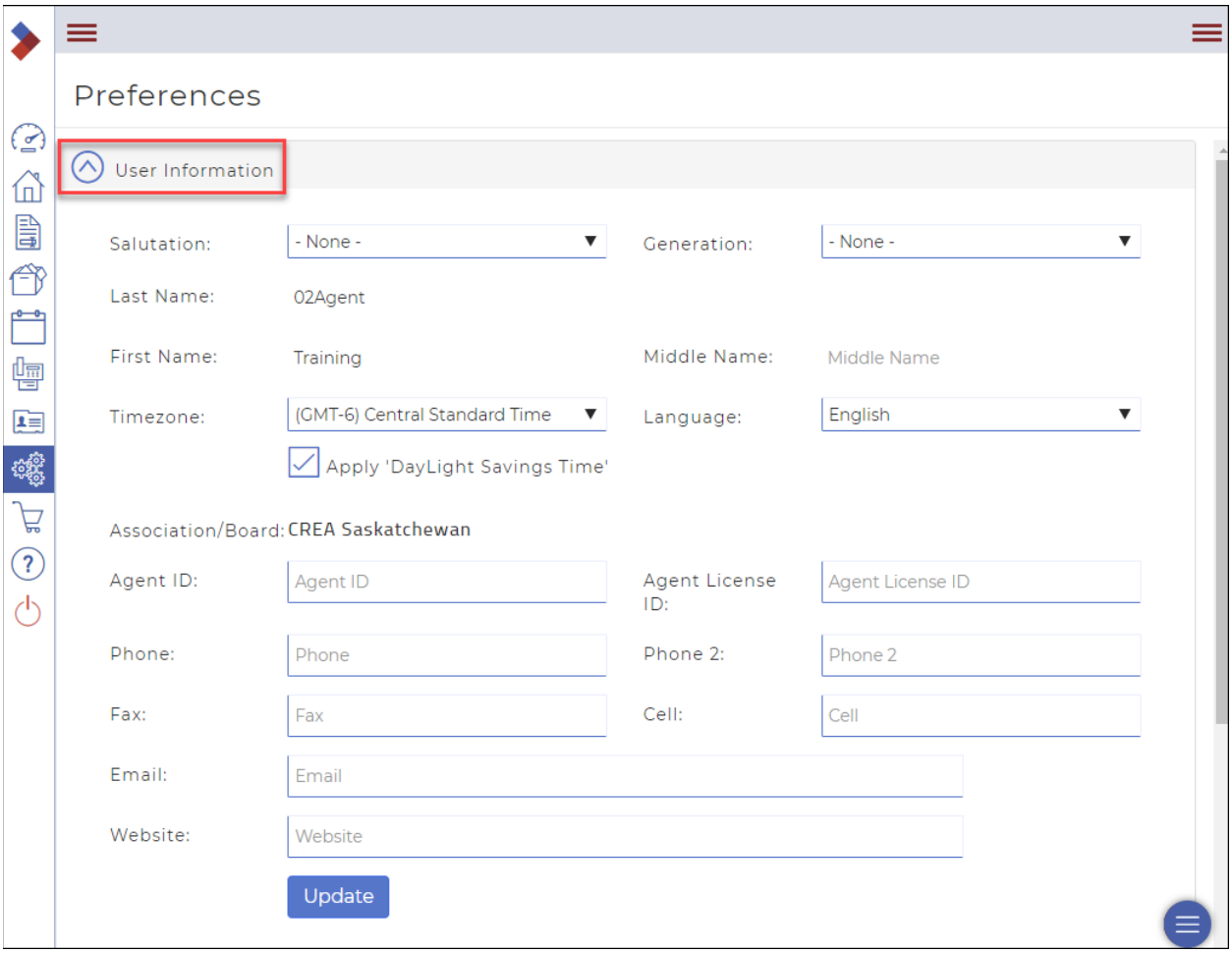
1. In the Sidebar, click **Setup** .
   The **Setup** window displays.



2. Click **Preferences**.
   The **Preferences** window displays.

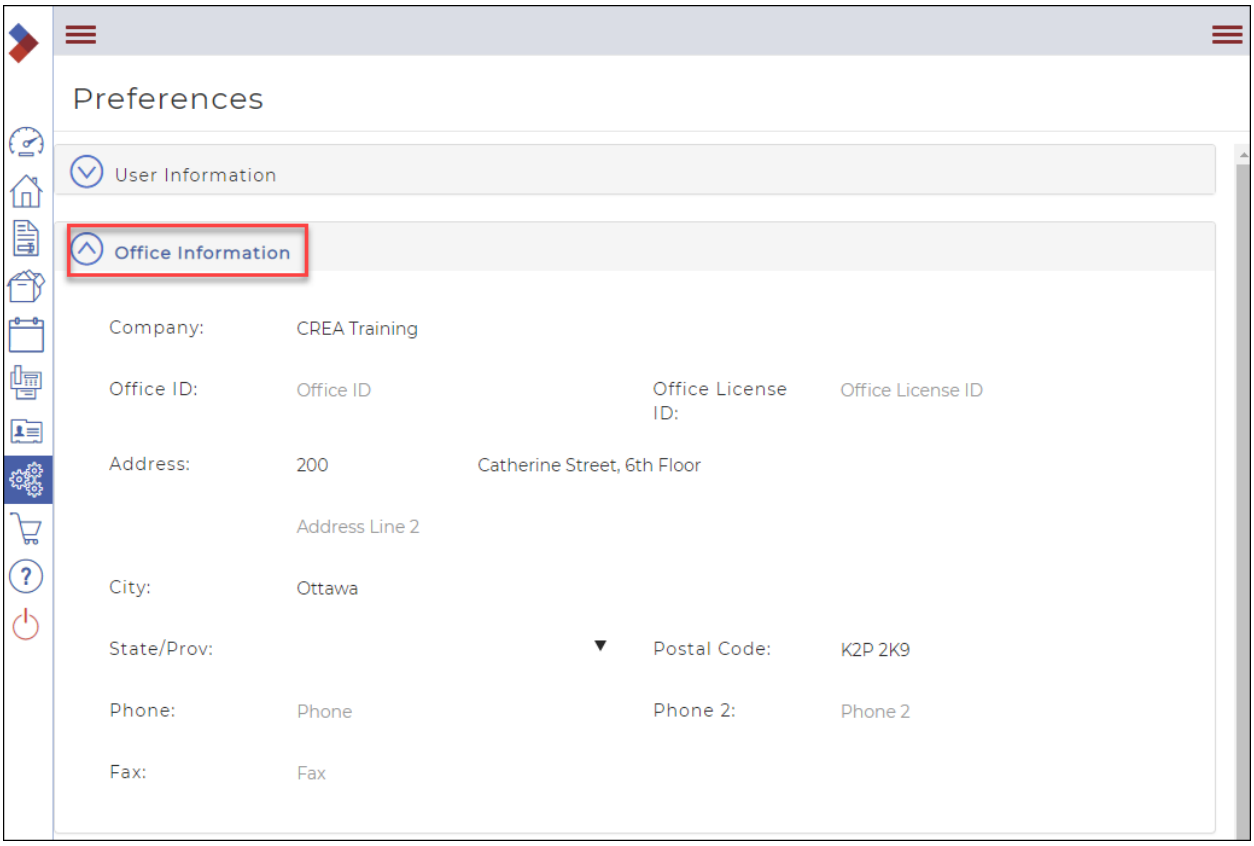


3. Click **User Information** to set up your personal profile information, such as name, contact information, real estate license ID number, and time zone.

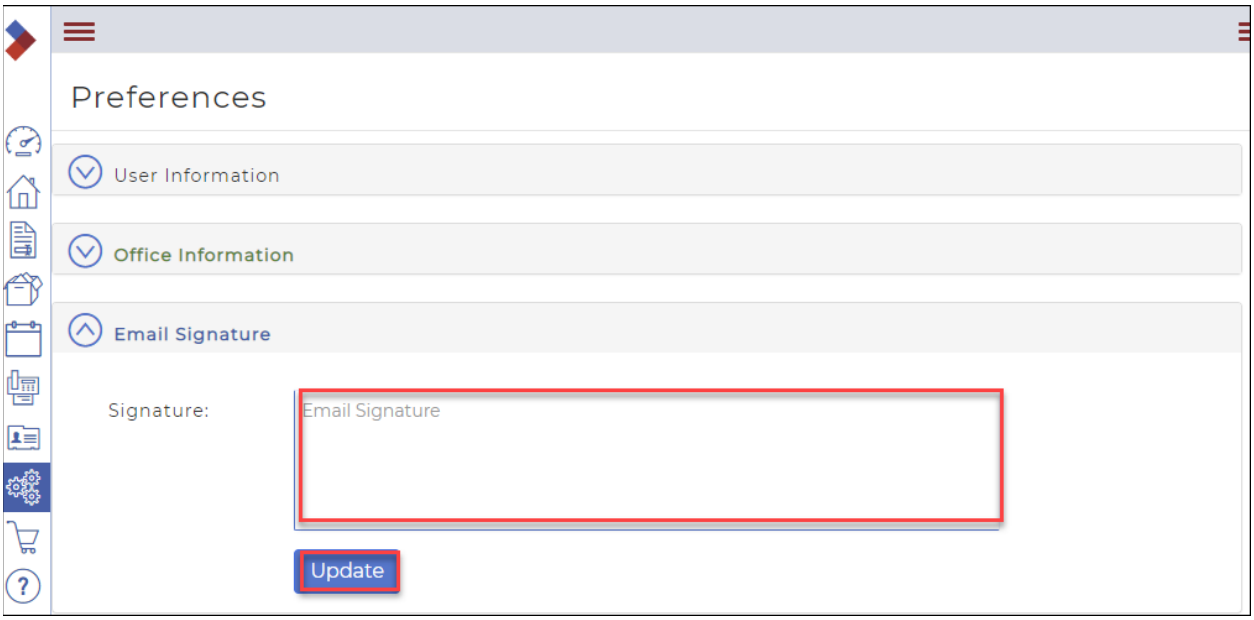


4. When you are finished, click **Update**.
   Your profile information is saved.
5. Click **Office Information** to add information about your office, such as the office address and contact information.

   Note: Office information cannot be edited by a Salesperson.



6. When you are finished, click **Update**.
   Your office information is saved.
7. Click **Email Signature** if you need to add a personalized email signature to any emails that you send directly from the system.



8. Type the email signature in the **Email Signature** field.
9. Click **Update** to save the signature.

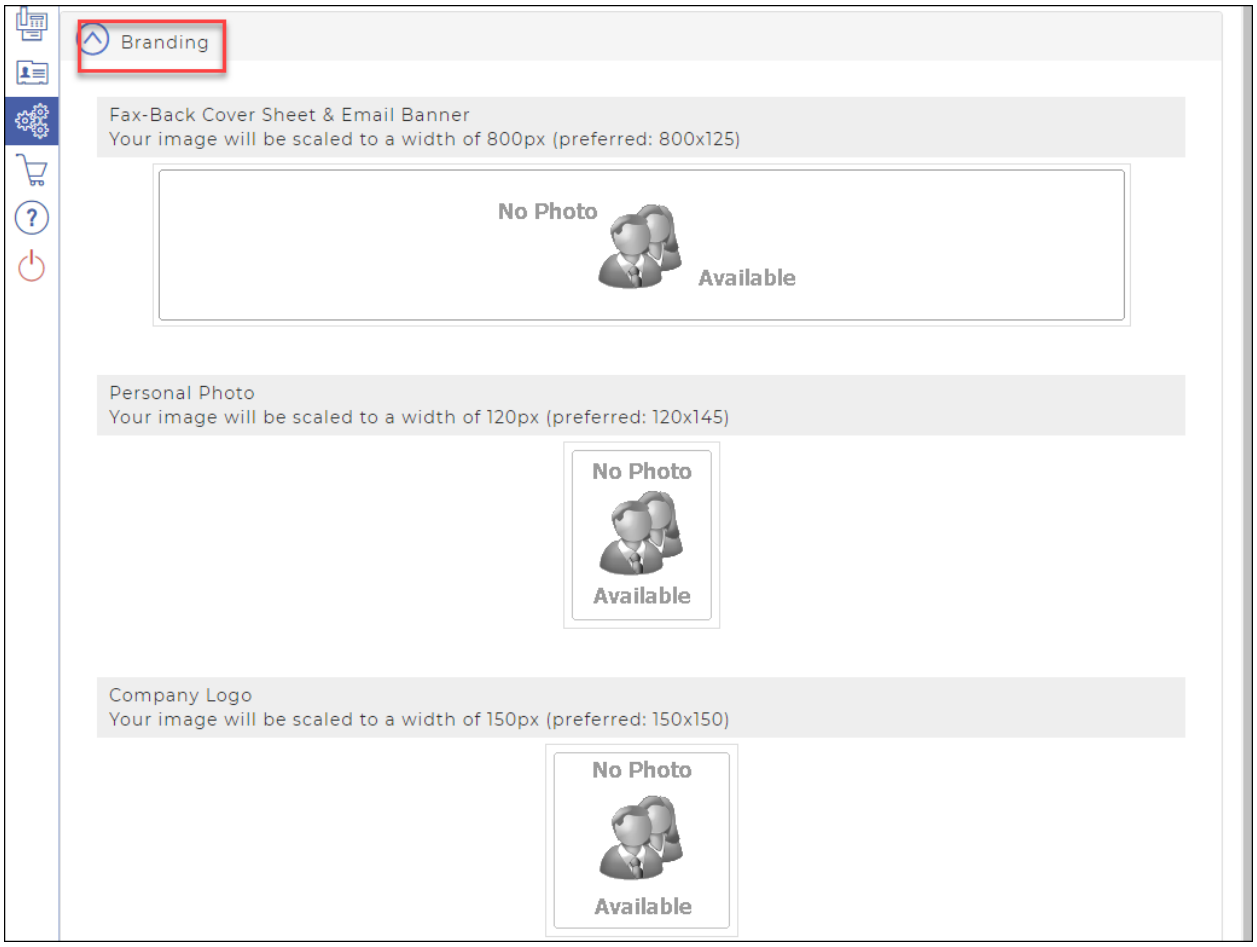
10. Click **Branding** if you need to add branding information to your profile, such as a personalized fax-back cover sheet, email banner, personal profile photo, or company logo.

Adding Branding Video

CLICK TO VIEW VIDEO

Removing Branding Video

CLICK TO VIEW VIDEO

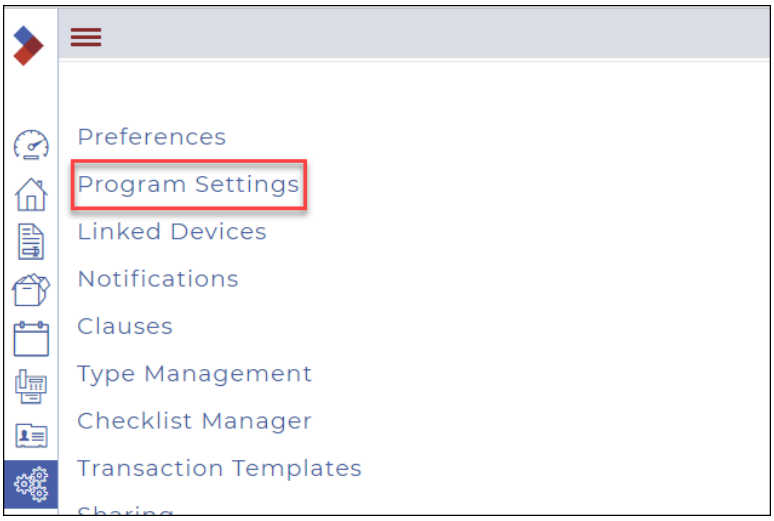


11. Click the photo area to locate the needed photo in your device's file manager and upload it to the system.

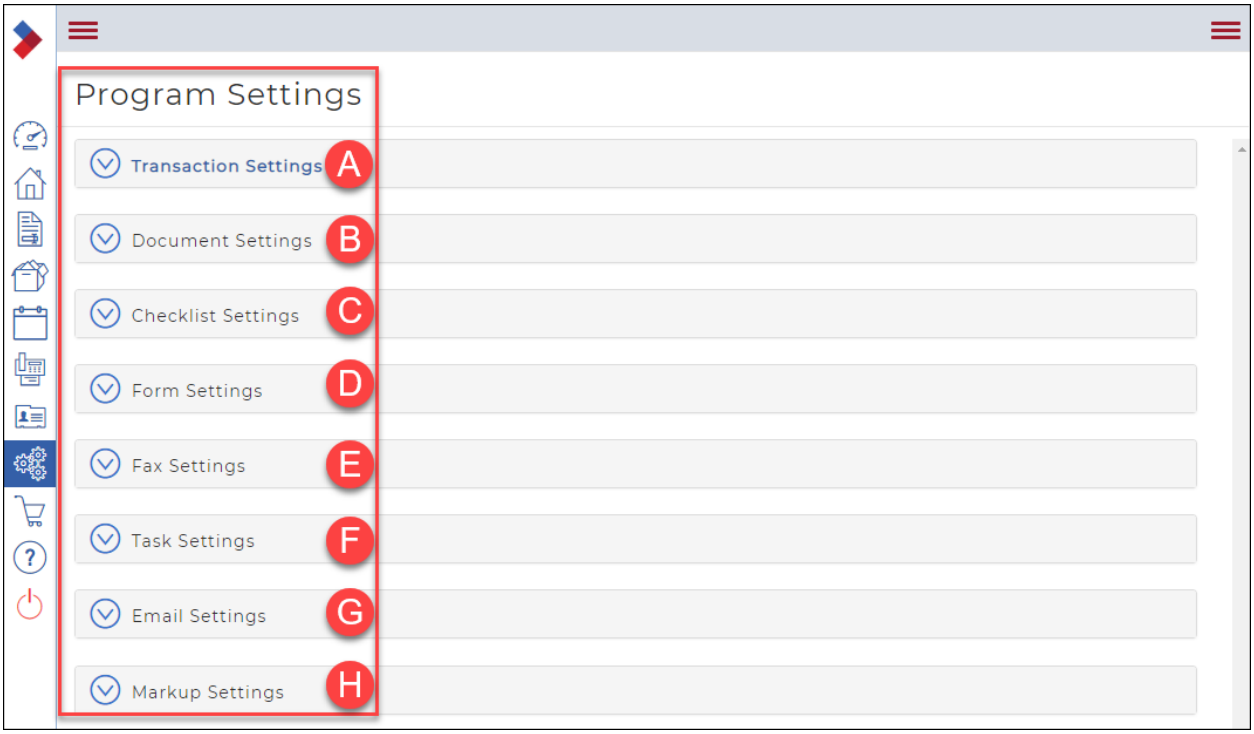
Configuring Program Settings

The system provides several general program settings that affect all users. These settings define how users see and interact with transactions, documents, checklists, forms, faxes, tasks, and emails.

1. In the Sidebar, click **Setup** .
   The **Setup** window displays.

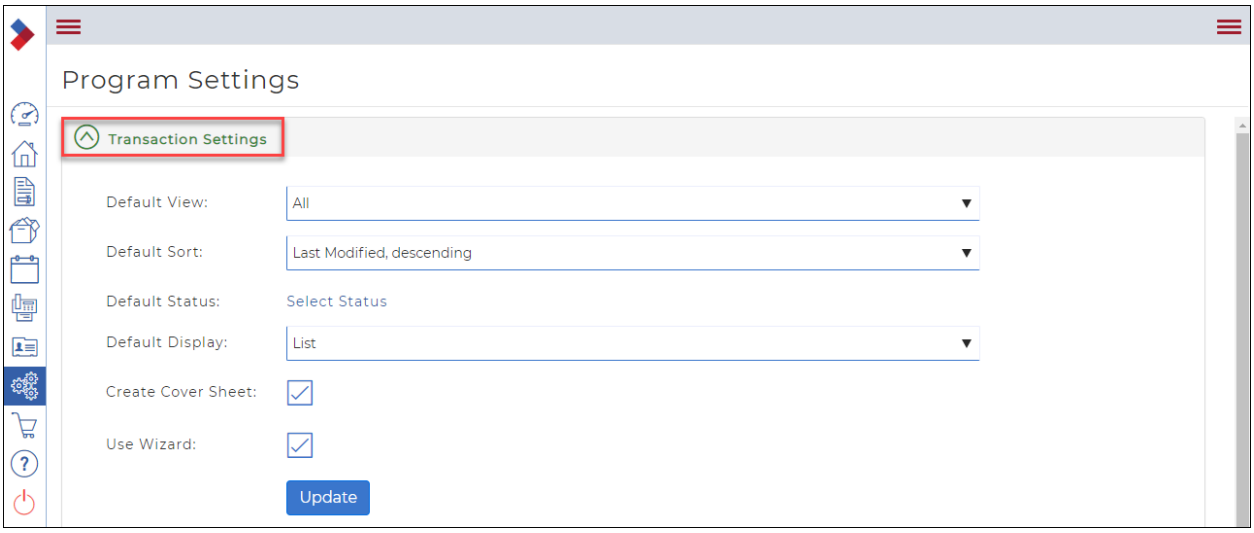


2. Click **Program Settings**.
   The **Program Settings** window displays.



A. Click **Transaction Settings** to configure transaction settings, such as the default views, sorting, and display formats, and other transaction-specific settings for the entire office. When you have finished making changes to the transaction settings, click **Update**.

CLICK TO VIEW VIDEO

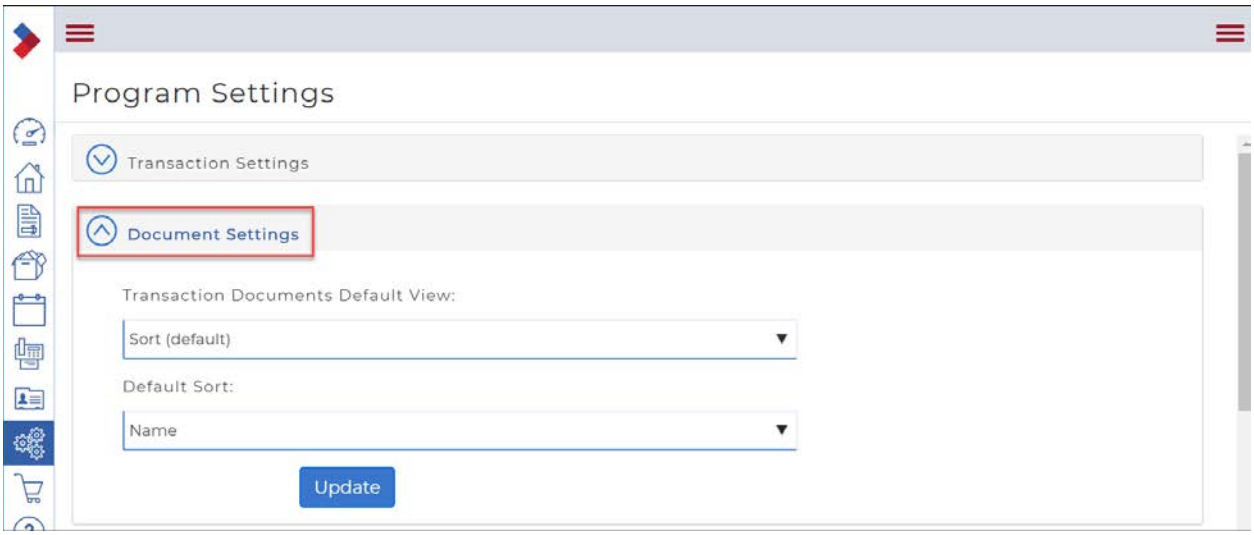


Transaction Settings

Field	Description
Default View	Specifies the default view to use when displaying the list of transactions. **All**: Displays transactions owned by the user, and transactions shared by the user. **Mine**: Displays only transactions owned by the user. **Shared**: Displays only transactions shared with the user.
Default Sort	Specifies the default field to sort the list of transactions by, and the default sort order, ascending or descending.
Default Status	Specifies the status of transactions to display by default in the list of transactions.
Default Display	Specifies the default format of the transaction list display. **List**: Displays a list of transactions. Each item in the list includes the image, transaction name, type of listing, and the last modified date. **Grid**: Displays a thumbnail view of the list of transactions in a grid. Each item in the list includes the image and the transaction name.
Create Cover Sheet	When checked, automatically creates a fax cover sheet for the transaction. When unchecked, no fax cover sheet is created.
Use Wizard	When checked, when a user creates a new transaction, the option to use the wizard is selected. Users can still choose not to use the wizard. When unchecked, when a user creates a new transaction, the option to use the wizard is not selected. Users can still choose to use the wizard.

B. Click **Document Settings** to configure the default transaction document settings, such as whether to sort them alphabetically. When you have finished making changes to the document settings, click **Update**.

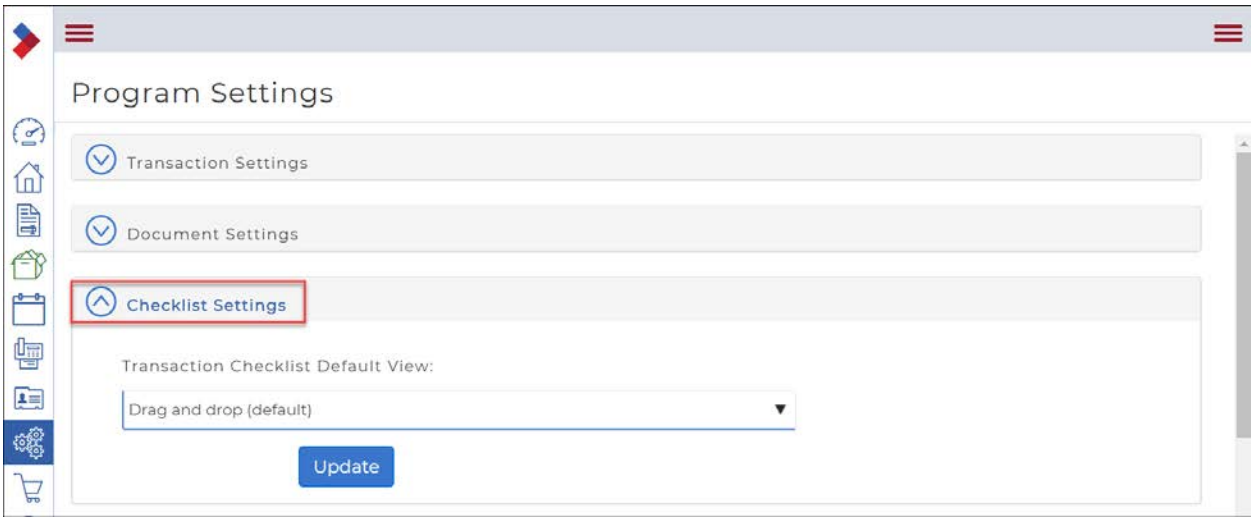
CLICK TO VIEW VIDEO



Document Settings

Field	Description
Transaction Documents Default View	Specifies how to order documents in the list of documents in a transaction. **Sort**: Sort the documents in the list alphabetically. **Drag and drop**: Allow the user to drag and drop the documents into the order they prefer.
Default Sort	Specifies the default field to sort the list of documents by.

C. Click **Checklist Settings** to configure the default checklist view, such as whether to sort checklist items in a transaction alphabetically. When you have finished making changes to the checklist settings, click **Update**.

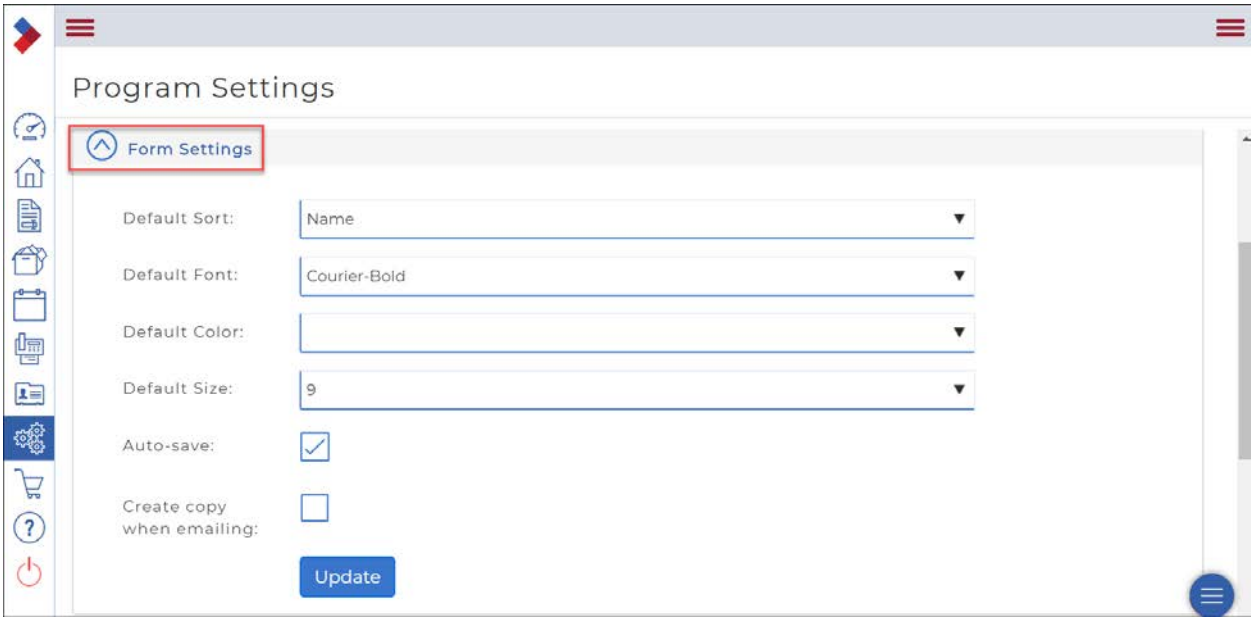


Checklist Settings

Field	Description
Transaction Checklist Default View	Specifies how to order checklist items in the checklist in a transaction. **Sort**: Sort the items in the checklist alphabetically. **Drag and drop**: Allow the user to drag and drop the checklist items into the order they prefer.

D. Click **Form Settings** to configure the default form settings, such as what field to sort on, fonts and colors to use, and whether to automatically save a copy. When you have finished making changes to the form settings, click **Update**.

CLICK TO VIEW VIDEO

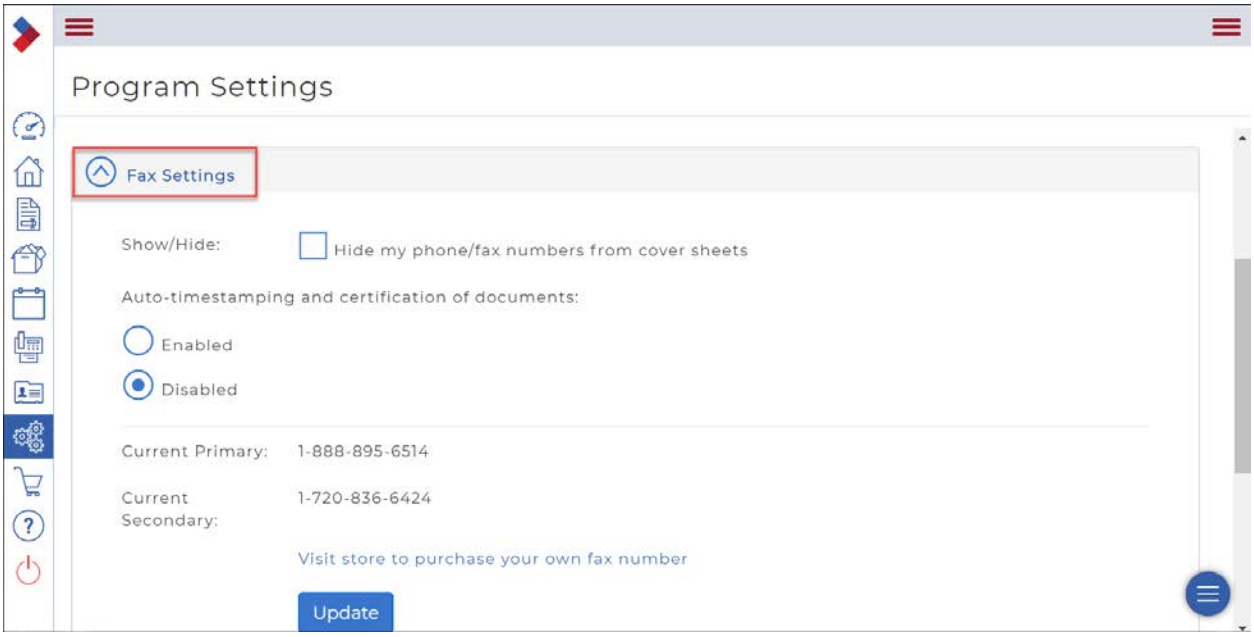


Form Settings

Field	Description
Default Sort	Specifies the default field to sort the list of forms by, and the default sort order, ascending or descending.
Default Font	Specifies the default font to use for text in forms.
Default Color	Specifies the default color to use for text in forms.
Default Size	Specifies the default font size, in points, to use for text in forms. Typical font sizes for documents range from 10 to 12 points.
Auto-save	When checked, automatically saves a copy of the form periodically. Also automatically saves a copy of the form if you close the editor without saving.
Create copy when emailing	When checked, automatically saves a copy of the form when you email it to anyone, which creates an extra copy of the form. This is a useful feature when sending a completed form as an editable link: if the participant makes a mistake, you have an extra copy.

E. Click **Fax Settings** to configure the default fax settings, such as whether to include phone and fax numbers on cover sheets, and whether to time stamp and certify documents. When you have finished making changes to the fax settings, click **Update**.

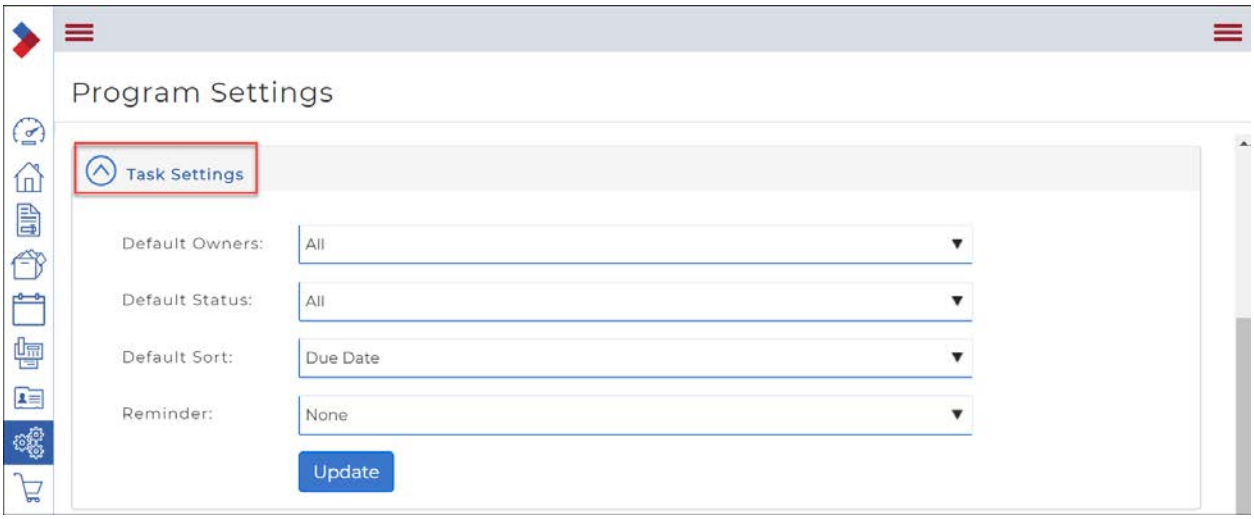
CLICK TO VIEW VIDEO



Fax Settings

Field	Description
Show/Hide	When checked, does not include sender's phone and fax numbers on the fax cover sheet. When unchecked, the sender's phone and fax numbers are printed on the fax cover sheet.
Auto-time stamping and certification of documents	**Enabled**: Includes a time-stamp and certification mark on documents. **Disabled**: Does not include a time-stamp or certification mark on documents.

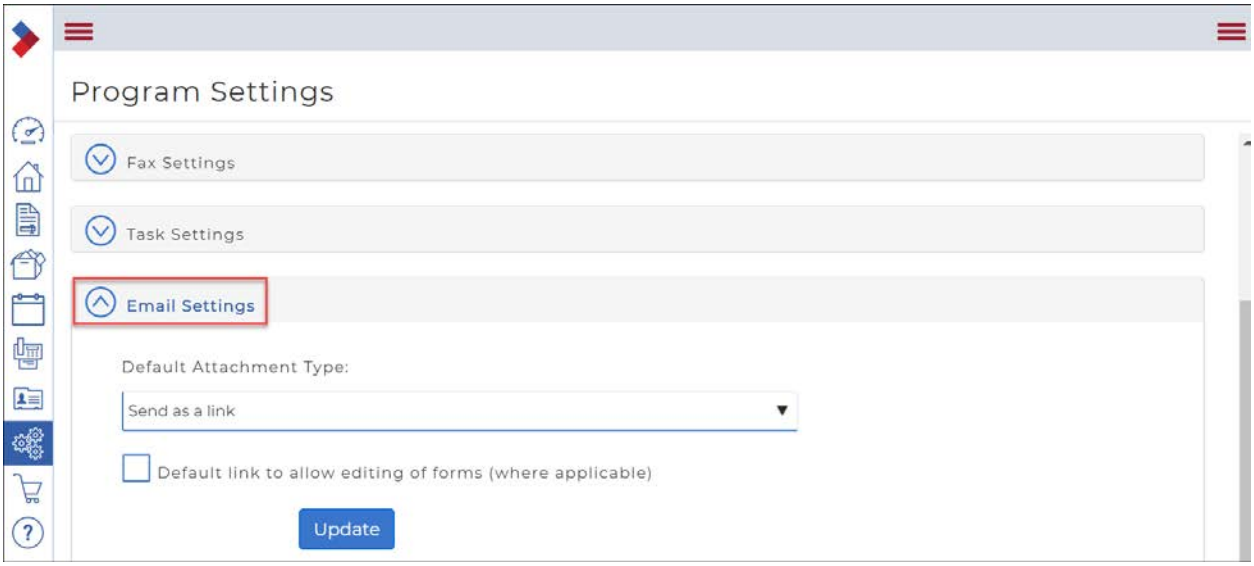
F. Click **Task Settings** to configure the default task settings, such as the default owner, default status, sort order, and whether to send a reminder. When you have finished making changes to the task settings, click **Update**.



Task Settings

Field	Description
Default Owners	Specifies the default filter to use for the list of tasks. **All**: Displays all tasks created by you or shared with you. **Assigned**: Displays all tasks that other people have assigned to you. **Mine**: Displays only tasks created by you.
Default Status	Specifies the default task status to filter on. By default, your list shows only open tasks. When you complete a task, it disappears from your list unless you use the filter option to show completed tasks. **All**: Displays tasks that are both open and completed. **Open**: Displays all open tasks. **Completed**: Displays all completed tasks.
Default Sort	Specifies the default field to sort the list of tasks by, and the default sort order, ascending or descending.
Reminder	Specifies the default type of reminder. **None**: Sends no reminders of tasks that are due. **Summarized daily reminder**: Sends a reminder once a day of tasks that are due.

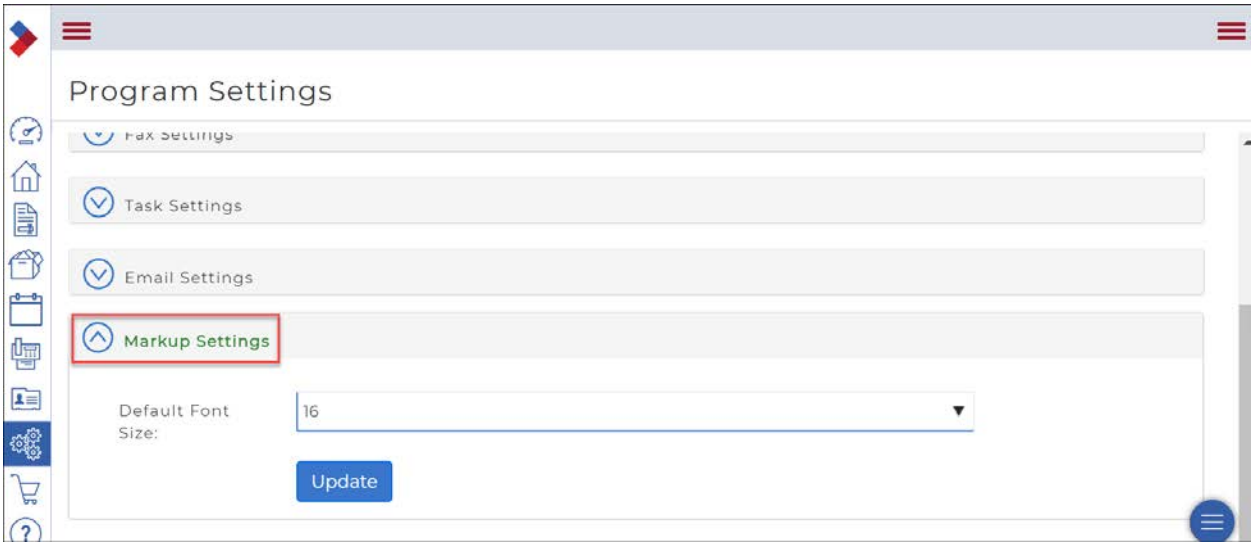
G. Click **Email Settings** to configure the default email settings, such as how to send attachments, and whether to allow editing of attachments. When you have finished making changes to the email settings, click **Update**.



Email Settings

Field	Description
Default Attachment Type	Specifies how to send attachments in emails. **Send as a link**: Sends a link to the attachments, which reduces the size of the email. The user can click on a link to download the attachment. **Send as attachment**: Attaches the document directly to the email, which makes it easier for the user to access the document. However, with multiple attachments, emails could potentially exceed the size allowed by some email servers.
Default link to allow editing of forms (where applicable)	When checked here, by default, this option checks the Allow editing of forms checkbox in the Email a form page. When a participant receives the email, and opens the form, they can fill out the form.

H. Click **Markup Settings** to configure the default markup settings, such as the default font size. When you have finished making changes to the markup settings, click **Update**.



Markup Settings

Field	Description
Default Font Size	Specifies the default font size, in points, to use for text in forms. Typical font sizes for documents range from 10 to 12 points.
Default Status	Specifies how to order documents in the list of documents in a transaction. **Sort**: Sort the documents in the list alphabetically. **Drag and drop**: Allow the user to drag and drop the documents into the order they prefer.

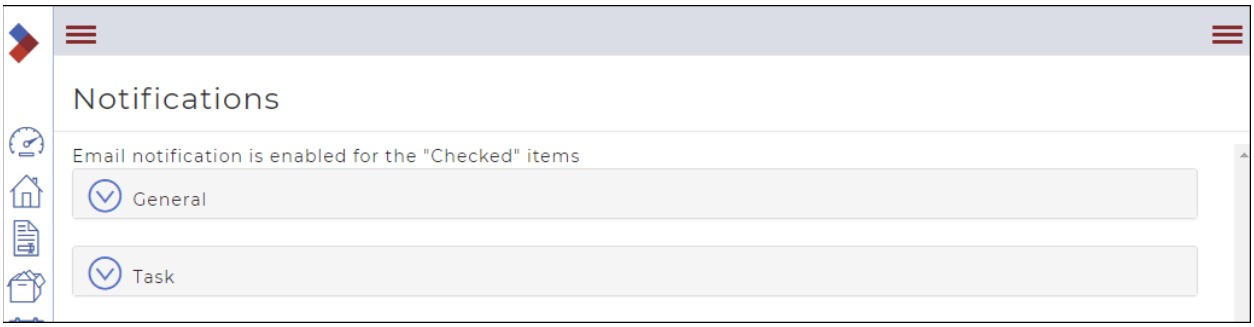
Setting up notifications

You can have the system notify users automatically when certain events take place. You must specify which actions and items should generate an email notification.

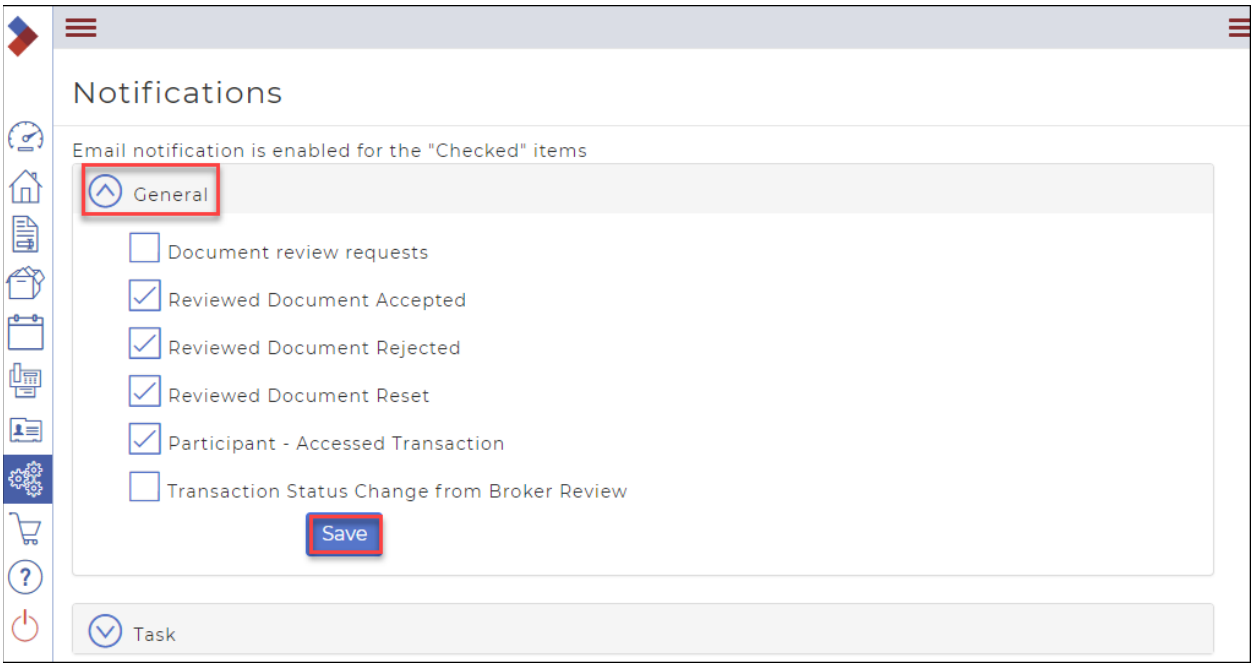
To set up notifications:

1. In the Sidebar, click **Setup** .
   The **Setup** window displays.

2. Click **Notifications**.
   The **Notifications** window displays.



3. To have the system notify you when a new transaction is created, or to notify you when a participant accesses a transaction in the system, click **General**.
   The dropdown displays.



4. See "**General Settings**" below for detailed information about the email notification settings fields. When you have finished making changes to the email notification settings, click **Save**.

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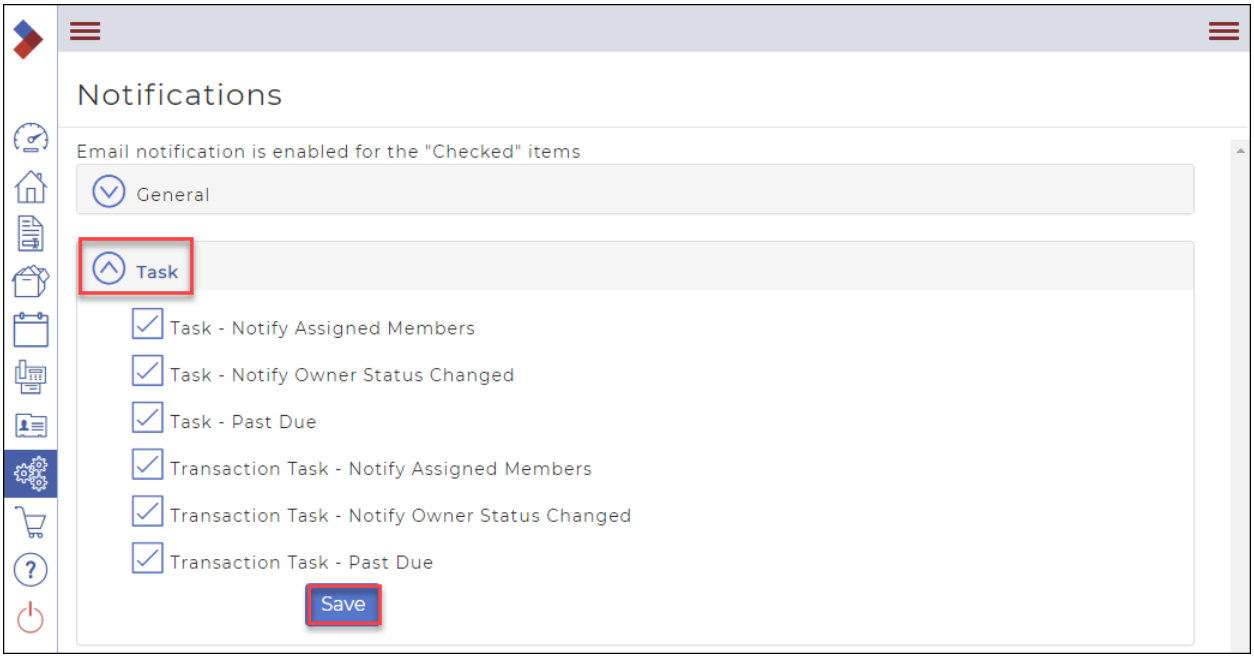
General Settings

Field	Description
New transactions	When checked, specifies to email a notification when a new transaction is created.
Participant – Accessed Transaction	When checked, specifies to email a notification when a participant accesses a transaction.

5. To have the system notify you regarding tasks or transaction tasks, click **Task**.
   The dropdown displays.



6. See "**Task Settings**" below for detailed information about the task notification settings fields. When you have finished making changes to the task notification settings, click **Save**.

CLICK TO VIEW VIDEO

Task Settings

Field	Description
Task – Notify Assigned Members	When checked, specifies to notify the person or persons the task is assigned to.
Task – Notify Owner Status Changed	When checked, specifies to notify the owner of the task that the status changed.
Task –Past Due	When checked, specifies to notify the owner that the task is overdue.
Transaction Task – Notify Assigned Members	When checked, specifies to notify the person or persons the task is assigned to.
Transaction Task – Notify Owner Status Changed	When checked, specifies to notify the owner of the task that the status changed.
Transaction Task – Past Due	When checked, specifies to notify the owner that the task is overdue.

Setting up service providers

Save time by adding the service providers once, rather than adding them into individual transactions as required.

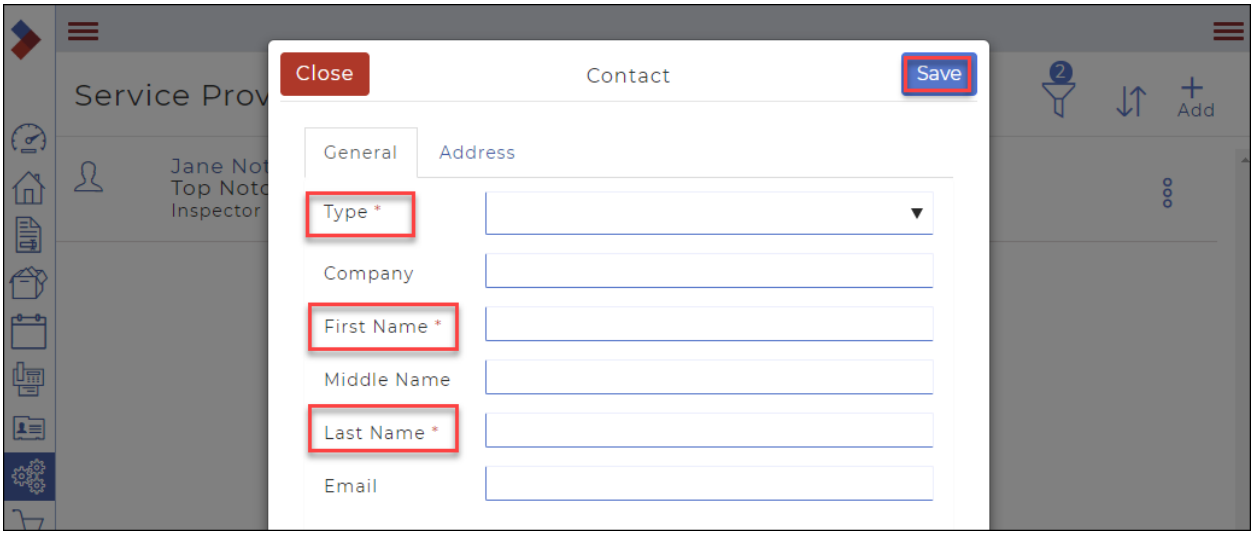
CLICK TO VIEW VIDEO

To set up service providers:

1. In the Sidebar, click **Setup** .
   The **Setup** window displays.

2. Click **Service Providers**.
   The **Service Providers** window displays.

3. Click **Add**.
   The **Contact** dialog box displays.



Note: Required fields are indicated with an asterisk.*

4. Required: Use the **Type** field to select the type of service provided.
5. Optional: In the **Company** field, enter the name of the company.
6. Required: In the **First Name** field, enter the first name of the service provider.
7. Required: In the **Last Name** field, enter the last name of the service provider.
8. Optional: In the **Email** field, enter an email address for the service provider.
9. Optional: Click the **Address** tab and enter the address and telephone information for the service provider.
10. When you have finished entering the information, click **Save**.
    The service provider is added to the list.

Linking to an esignature provider

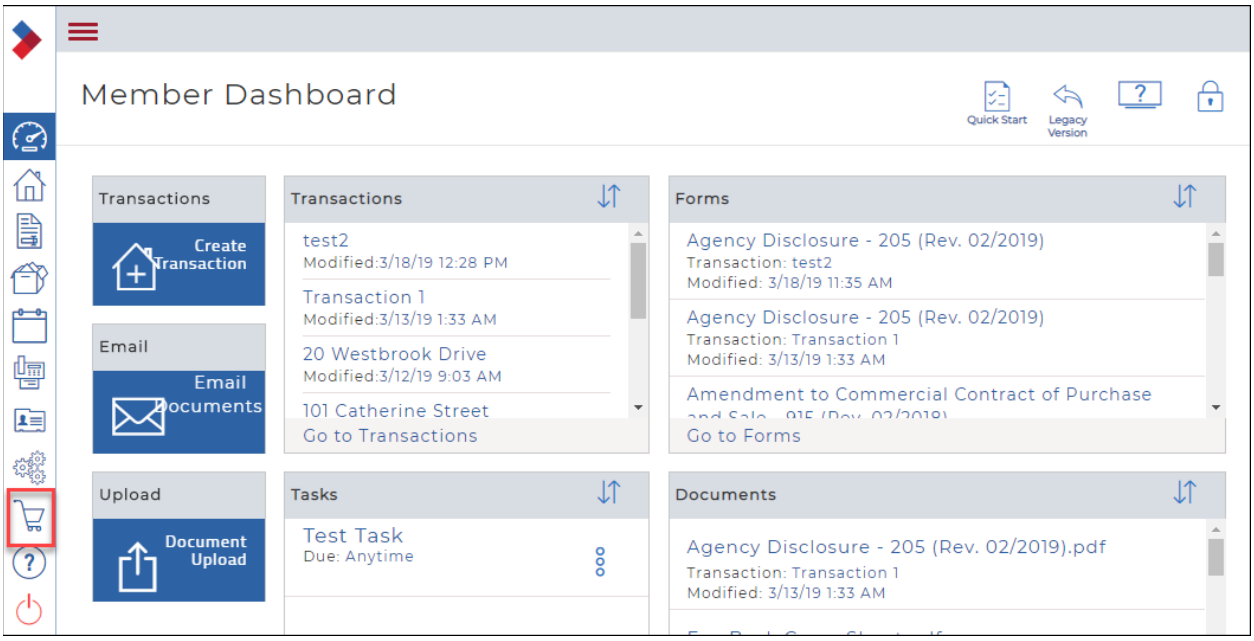
Note: Ensure that you have an account with an esignature provider. If you don't have an existing account, you can set one up during the process shown below.

You must link your CREA WEBForms® account to an esignature provider if you need to send your documents, forms, and transaction for signatures.

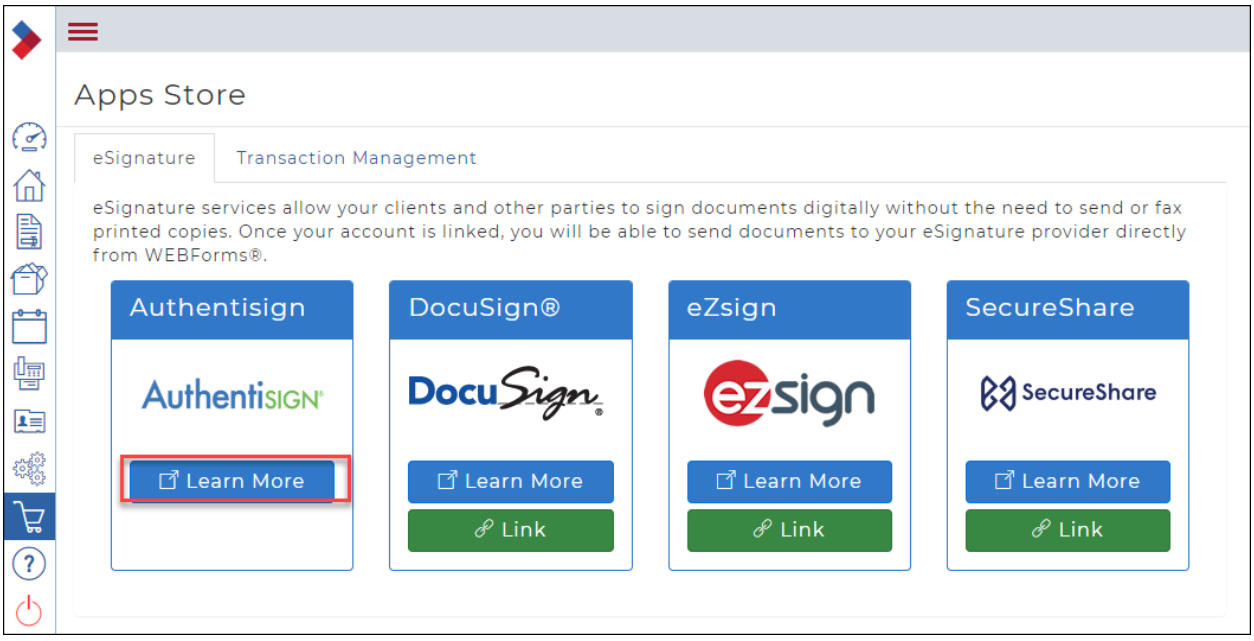
The process varies depending on the esignature provider with which you have an account:

- Authentisign
- Another third-party provider

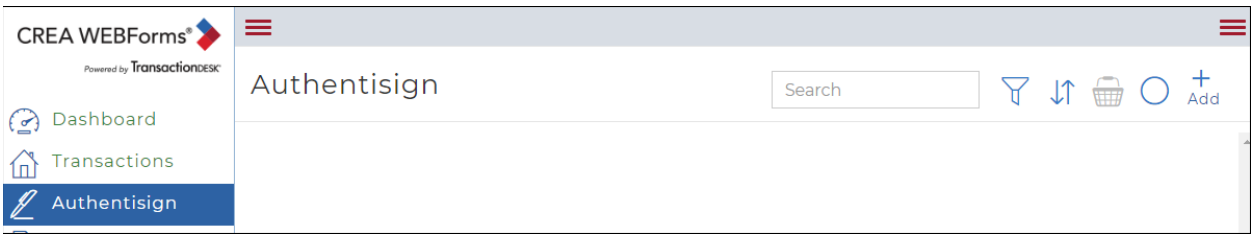
To link your CREA WEBForms® account to Authentisign:



1. In the Sidebar, click **Apps Store** .
   The **Apps Store** window displays.

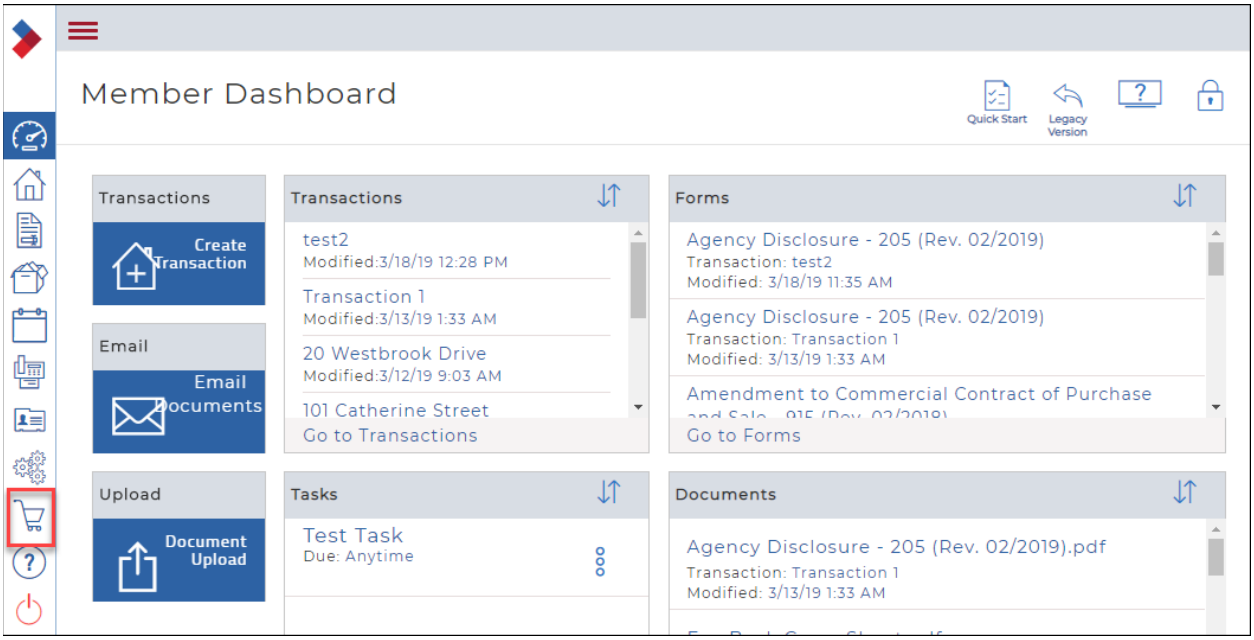


2. Click the Authentisign link and follow the instructions. Once you have added an Authentisign account, the **Authentisign** icon will display in your Sidebar.

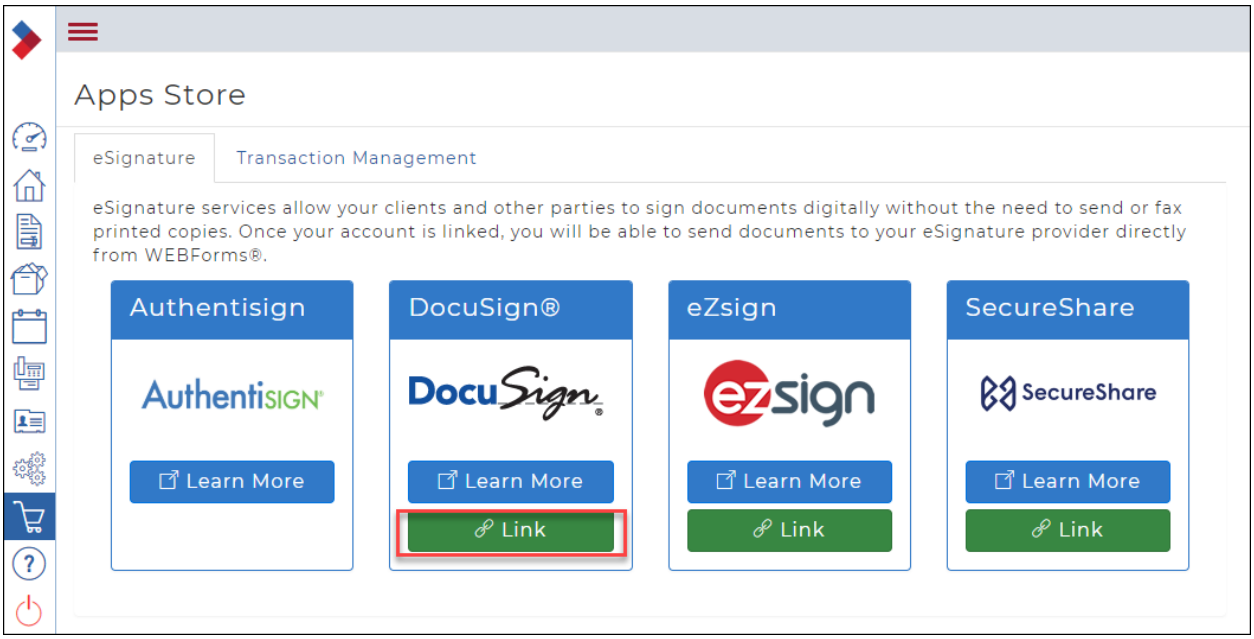


For detailed information on working with Authentisign, refer to the Authentisign documentation here.

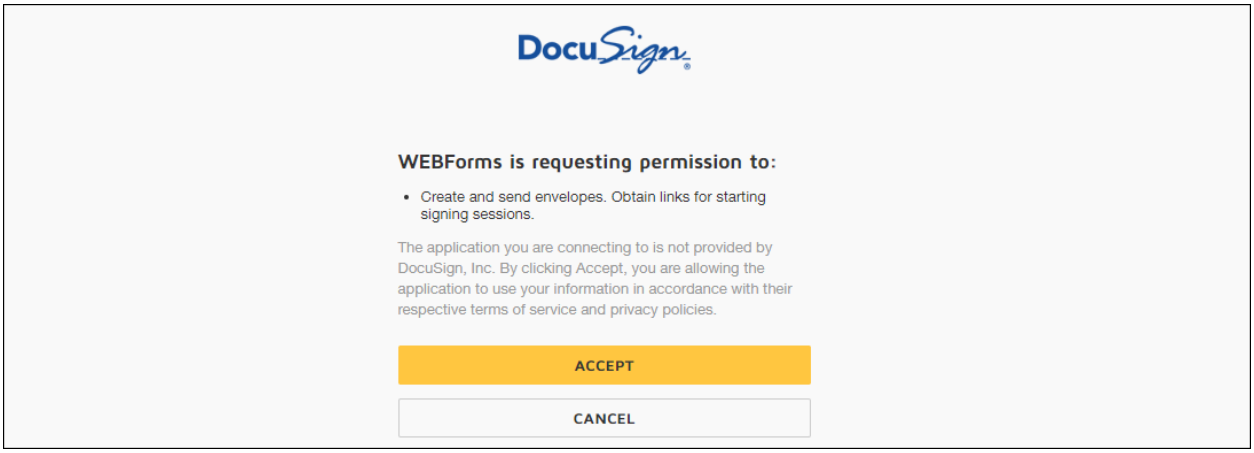
To link your CREA WEBForms® account to an esignature provider other than Authentisign:

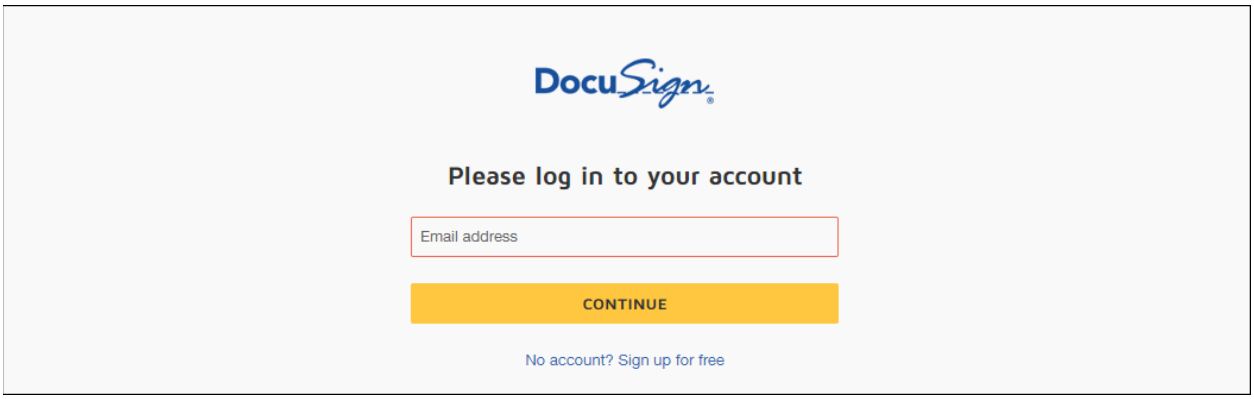


3. In the Sidebar, click **Apps Store** .
   The **Apps Store** window displays.

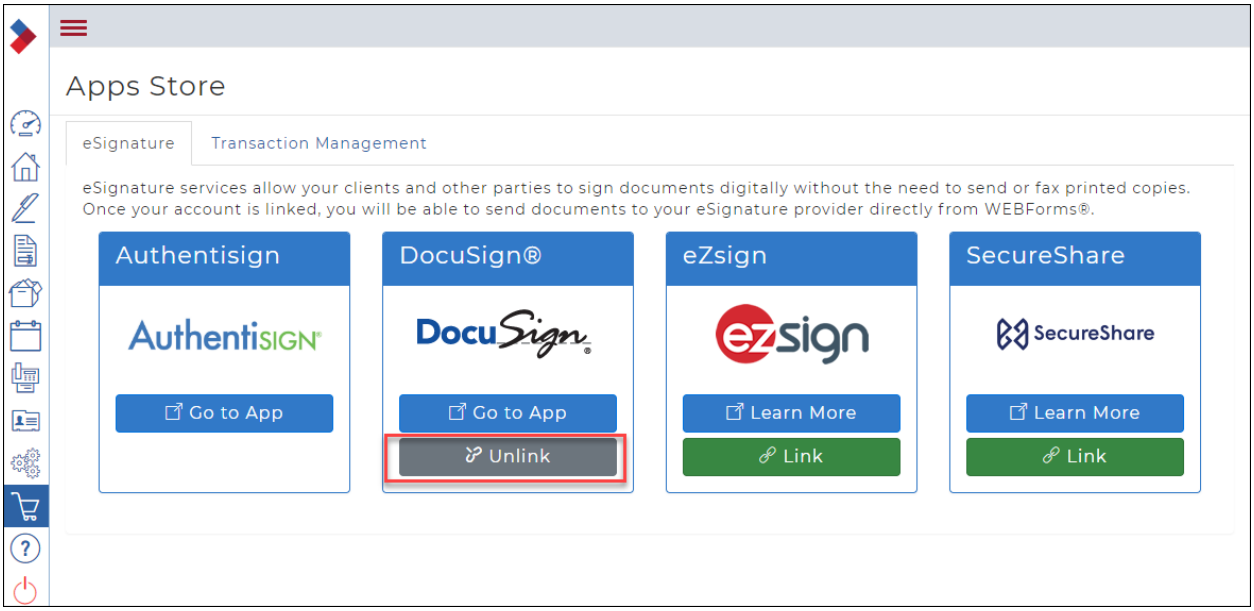


4. Click the **Link** button for the desired esignature provider.
   A window will display, allowing you to either log in to an existing account, or sign up for a new account.





5. Once your credentials are authenticated, you will be returned to the **Apps Store** window. The **Link** is now changed to **Unlink**.
   You have linked to your esignature provider.



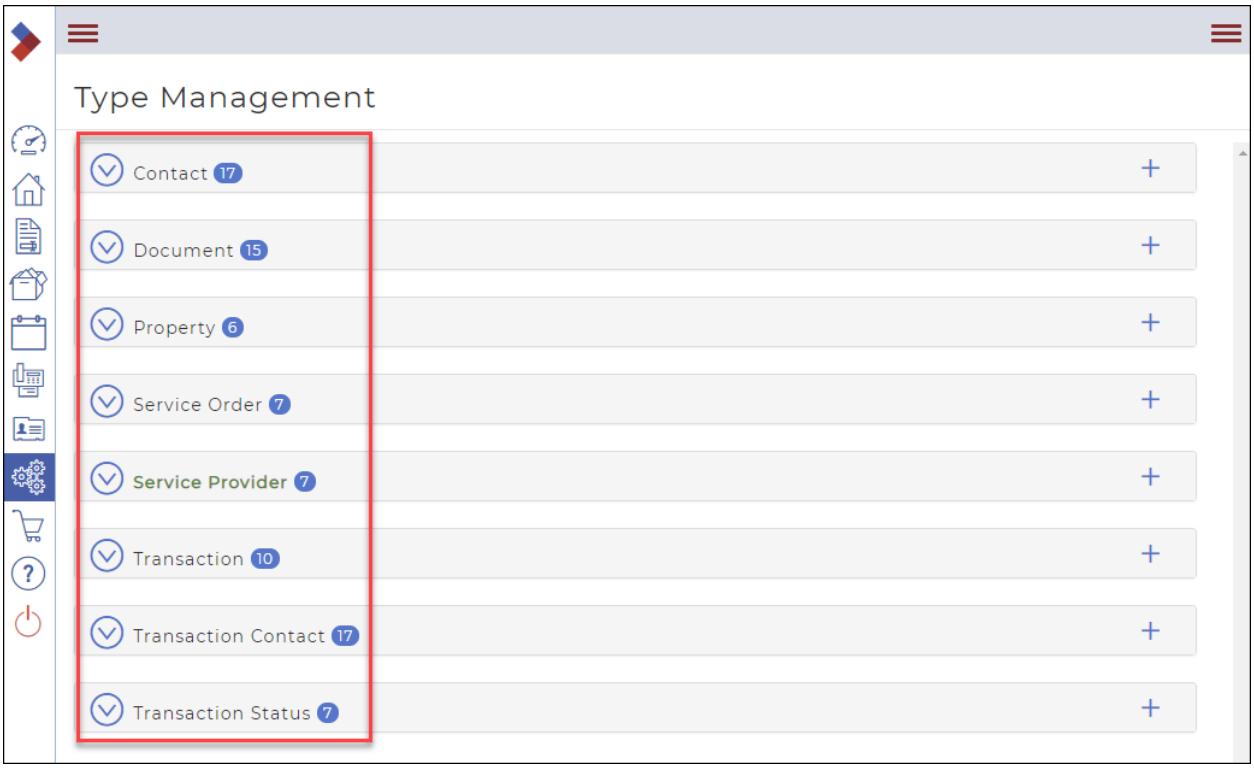
Managing Types

The system provides out-of-the-box types for the various kinds of data in the system. These are referred to as System Types. You can add your own types to the list.

To manage types:

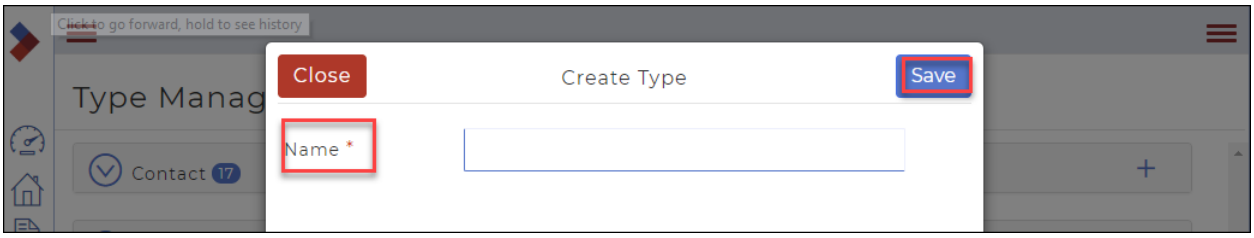
1. In the Sidebar, click **Setup** .
   The **Setup** window displays.

2. Click **Type Management**.
   The **Type Management** window displays.

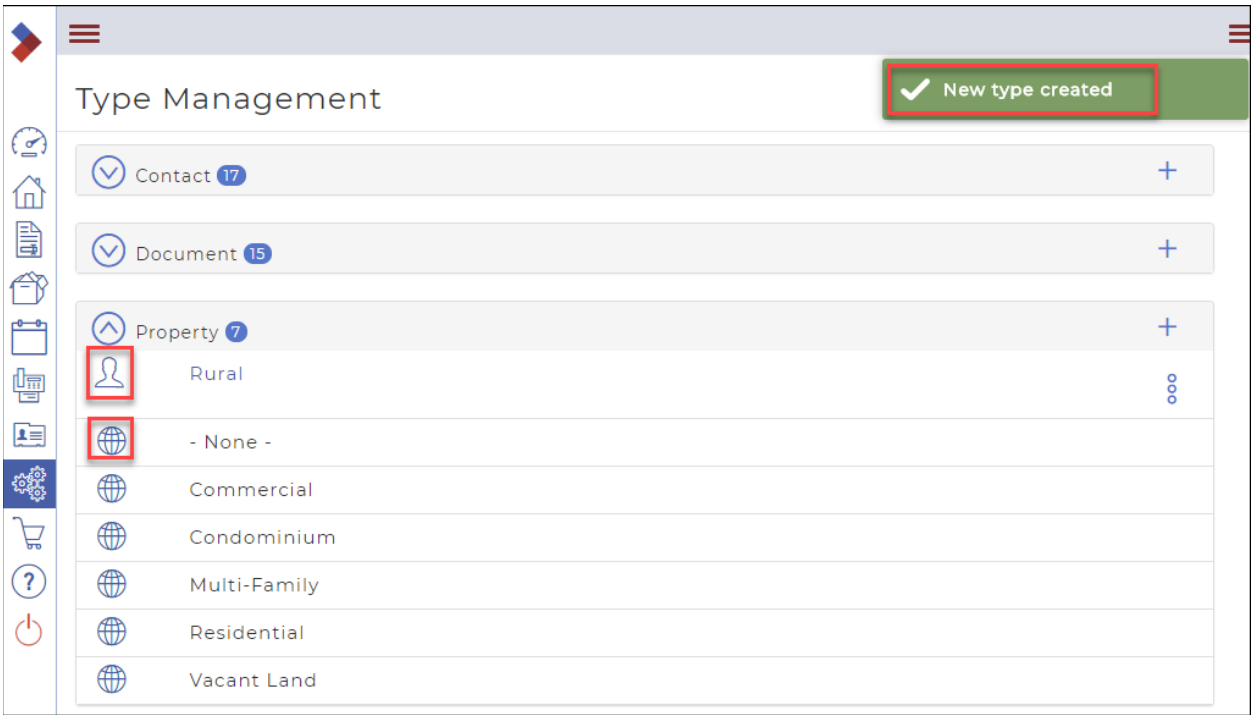


3. To view the out-of-the-box system types for any category, click the category name. For example, to view the system property types, click Property. The list of system property types displays.

4. To add a type to the list, click +.
   The **Create Type** dialog box displays.



5. In the **Name** field, enter a meaningful name for the type you want to create.
6. Click **Save**.
   A message briefly displays on the top right confirming that a new type was created.



The type is added to the list.

Note: Custom types have a user icon to the left of the name, whereas system types have a globe to the left of the name.

Review the types available for each category and add any additional types that you require.

Section E: Customizing your dashboards using Widgets

The Dashboards are your main workspaces. The initial dashboards you see on login are the default workspaces. These are fully customizable with widgets. Widgets are used to set up your workspace so that you can one-click to get to your most common tasks.

Once you are familiar with the platform, you can arrange the dashboards to suit your needs.

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Note: Widgets can be:

- *moved by dragging and dropping, and*
- *resized by clicking and holding on the corners..*

Note: It is a good idea to adjust the widgets for your most commonly-used device. For example, if you mainly use your mobile phone, add fewer widgets to the dashboards.

There are two customizable dashboards.

Member Dashboard

Transaction Dashboard

Customizing your Member Dashboard

You can change your member dashboard to include the information that is most important to you as a salesperson.

*Note: The **Get Started** widget is a useful addition when you are new to the system.*

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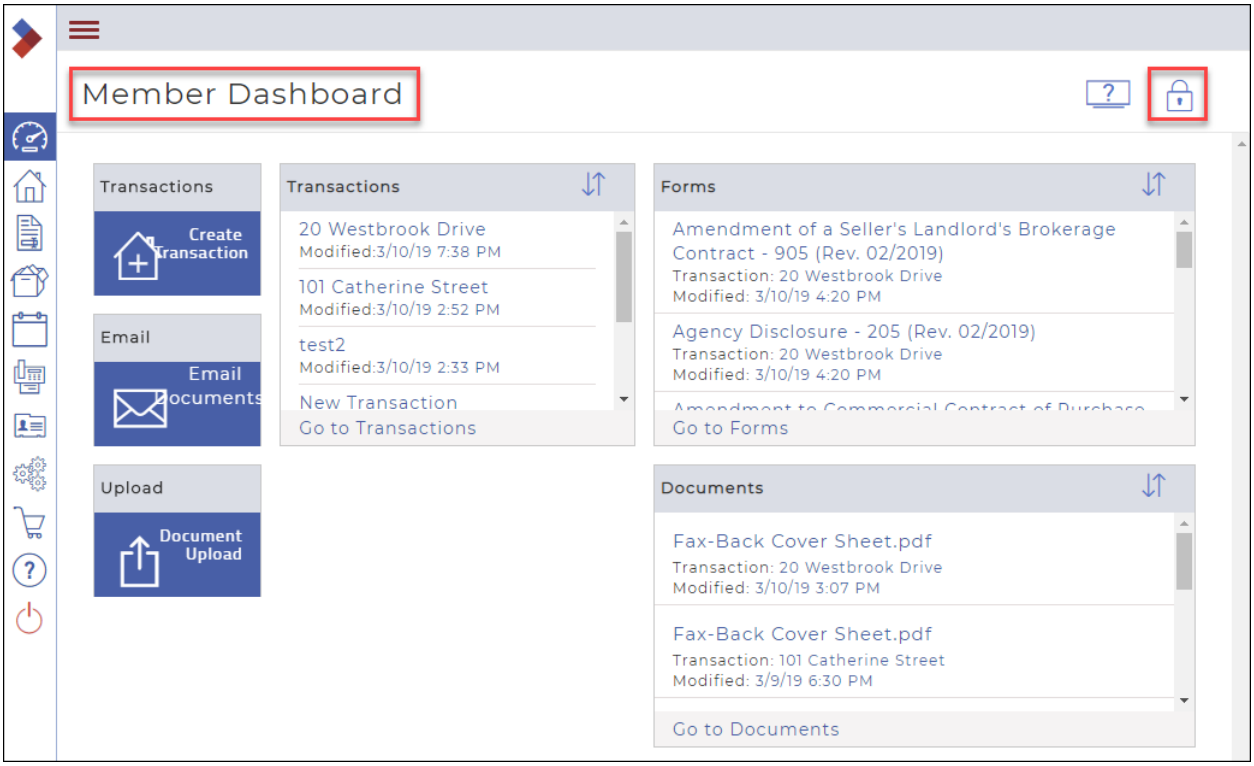
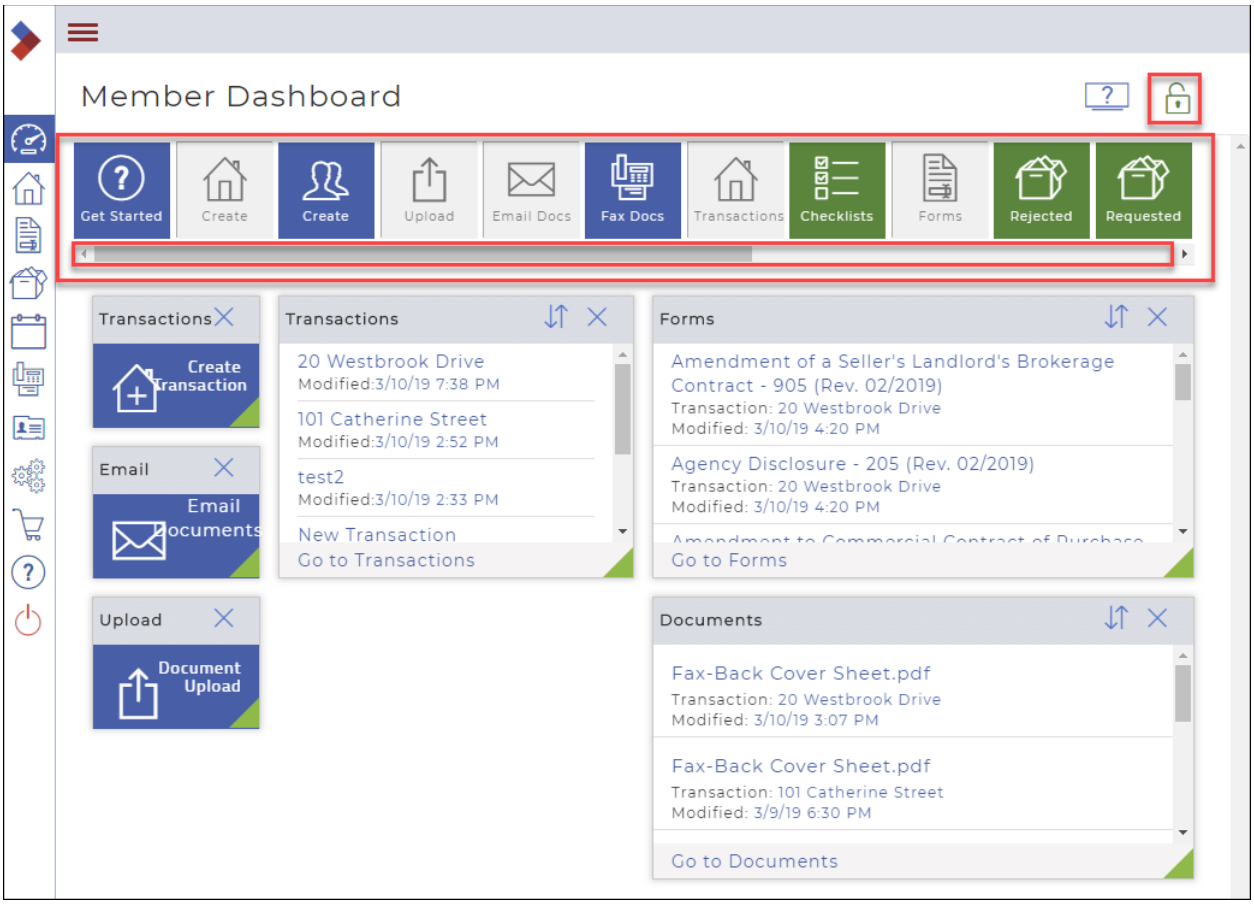
To customize your Member Dashboard:

1. In the Sidebar, click **Dashboard** .
   Your **Member Dashboard** displays.



2. Click **Lock** .
   Your dashboard is unlocked, with the Widget tray (note the scroll bar) displayed at the top.



3. Review the available widgets and determine what information will be most useful for you to see in the Member Dashboard.
   For descriptions of the widgets, see "Member Dashboard Widgets" below.

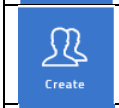
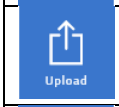
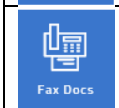
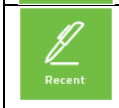
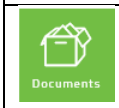
   Note: You can view more Widgets by using the scroll bar directly beneath the widget tray.

4. Drag and drop widgets onto the highlighted space in the dashboard. Continue to drag and drop widgets until you see the key information you require in your dashboard. Be sure you select the widgets that will be most helpful to you. For example, if you frequently upload documents, add the Document Upload widget to your dashboard.
   - The **grey** widgets are the ones that are already on the screen.
   - The **blue** widgets are shortcuts.
     You can use as many of the blue widgets as you like.
   - The **green** widgets provide at-a-glance summaries of information.
     You can use a maximum of six of the green widgets in your dashboard.

5. When you are finished selecting widgets for the Member Dashboard, click **Lock** to lock the dashboard configuration so you do not change it accidentally.

Member Dashboard Widgets

In the table below are brief descriptions of the available Member Dashboard Widgets.

Icon	Widget
	Get Started (Support) A shortcut to the Support page, where you can access support, training, videos, or documentation.
	Create Transaction A shortcut to create a transaction.
	Start Signing A shortcut to create a new signing.
	**Create Contact** A shortcut to create a new contact.
	**Document Upload** A shortcut to upload documents to a transaction or an inbox folder.
	Email Documents A shortcut to email one or more documents to a recipient email address.
	**Fax Documents** A shortcut to fax documents or forms.
	Transactions Provides a summary list of the salesperson's transactions. Click a transaction name to view the transaction. The widget also provides a shortcut to the list of all transactions.
	Checklists Provides a summary list of each of the salesperson's transactions that have checklists, and the percentage completion of each checklist. Click the name of the transaction to view the transaction.
	**Recent Signings** Provides a summary list of the salesperson's recent signings. The status of each signing is displayed. If the signing is associated with a transaction, the name of the transaction is also displayed. Click a signing name to view the signing. The widget also provides a shortcut to the list of all signings.
	Forms Provides a summary list of the salesperson's forms that are in progress. Click the name of a form to view the form. The widget also provides a shortcut to the list of all forms.
	Missing Documents Provides a summary list of the salesperson's checklists that are missing their associated documents. Each item in the list displays the transaction the checklist is a part of. Click a transaction name to view the transaction.
	**Documents** Provides a summary list of all the salesperson's documents. By default, the documents are listed with the most recent changes at the top of the list. Click a document name to view the document. The widget also provides a shortcut to the list of all documents.
	Overdue Tasks Provides a summary list of overdue tasks assigned to the user. The due date for each task is listed. Click a task name to view the task. You can edit the task directly from the widget. Provided the task is not mandatory, you can also delete the task from the widget. Mandatory tasks have a red M

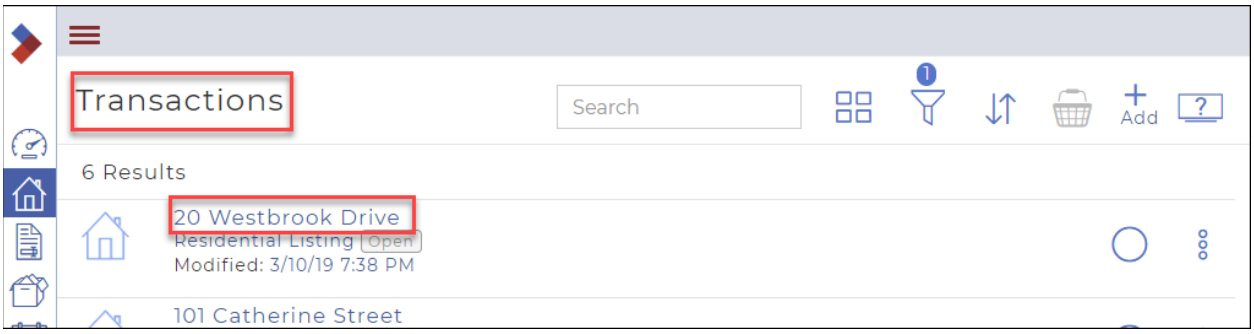
	symbol Ⓜ next to the task name in the widget. The widget also provides a shortcut to the list of all tasks.
Tasks	**Tasks** Provides a summary list of all the salesperson's tasks in all the salesperson's transactions. The name and due date for each task is listed, followed by the name of the transaction it is part of. Click a transaction name to go to the transaction dashboard. Mandatory tasks have a red M symbol Ⓜ next to the task name in the widget. You can edit the task directly from the widget. Provided the task is not mandatory, you can also delete the task directly from the widget. The widget also provides a shortcut to the list of all tasks. You can sort the list of tasks by due date, date created, or last modified date.
Completed	**Completed Tasks** Provides a summary list of completed tasks for the salesperson. The due date for each task is listed. Click a task name to view the task. The widget also provides a shortcut to the list of all tasks.
Messages	**System Messages** Provides a summary list of system messages. These messages include updates about the system including new features and any announcements about the application. Messages remain in this list until you open them and mark them to not show again.
Notes	**Notes** Provides a summary list of notes added to the salesperson's documents. The name of the user who created the note is displayed, followed by a preview of the note, followed by the name of the transaction the note applies to, and the date and time the note was modified. Click the transaction name to view the transaction.

Customizing your Transaction Dashboard

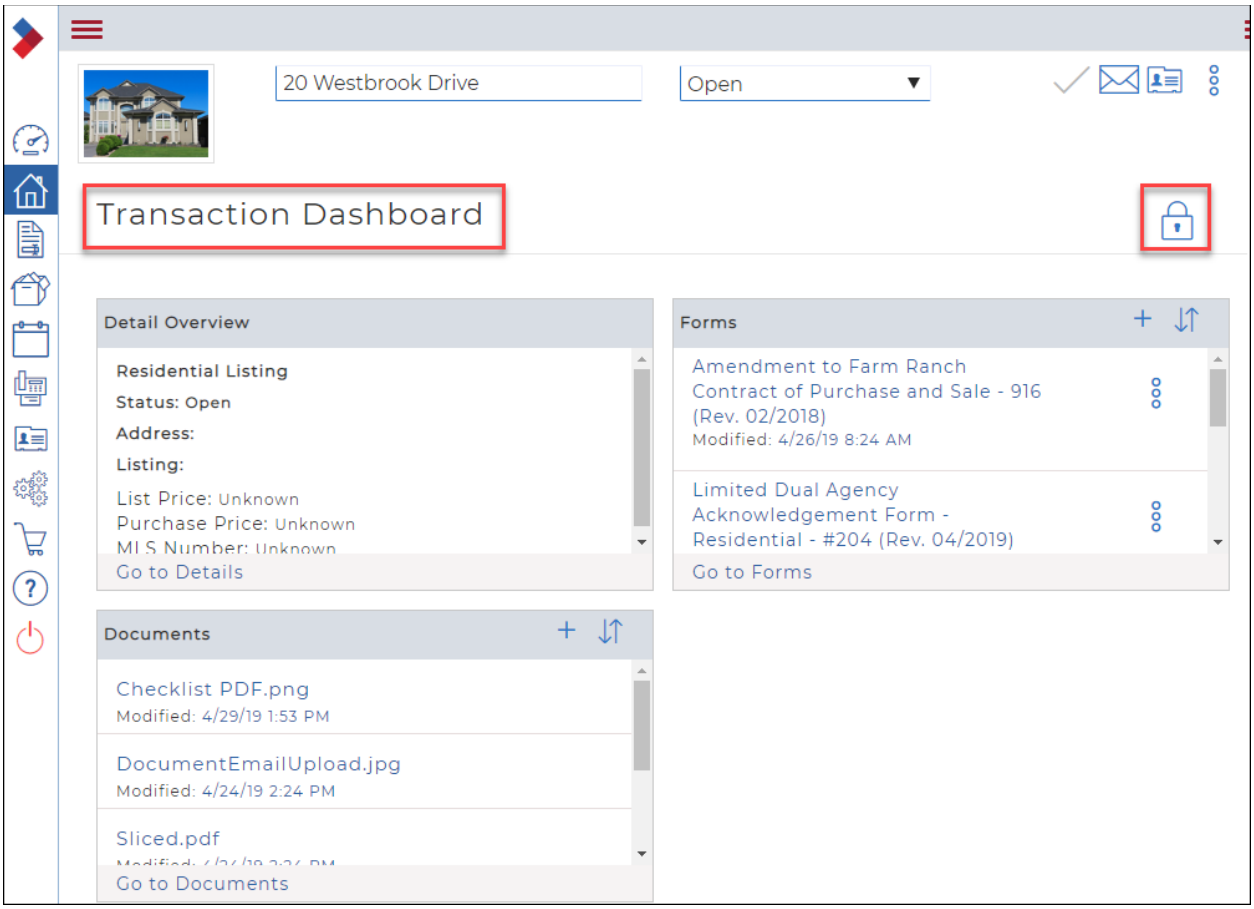
Each user of the system can personalize their view of the transaction dashboard, to make it as meaningful as possible. When you customize your view, it does not affect any other user's view of transactions. It does, however, define the view you see for every transaction.

To customize your Transactions Dashboard:

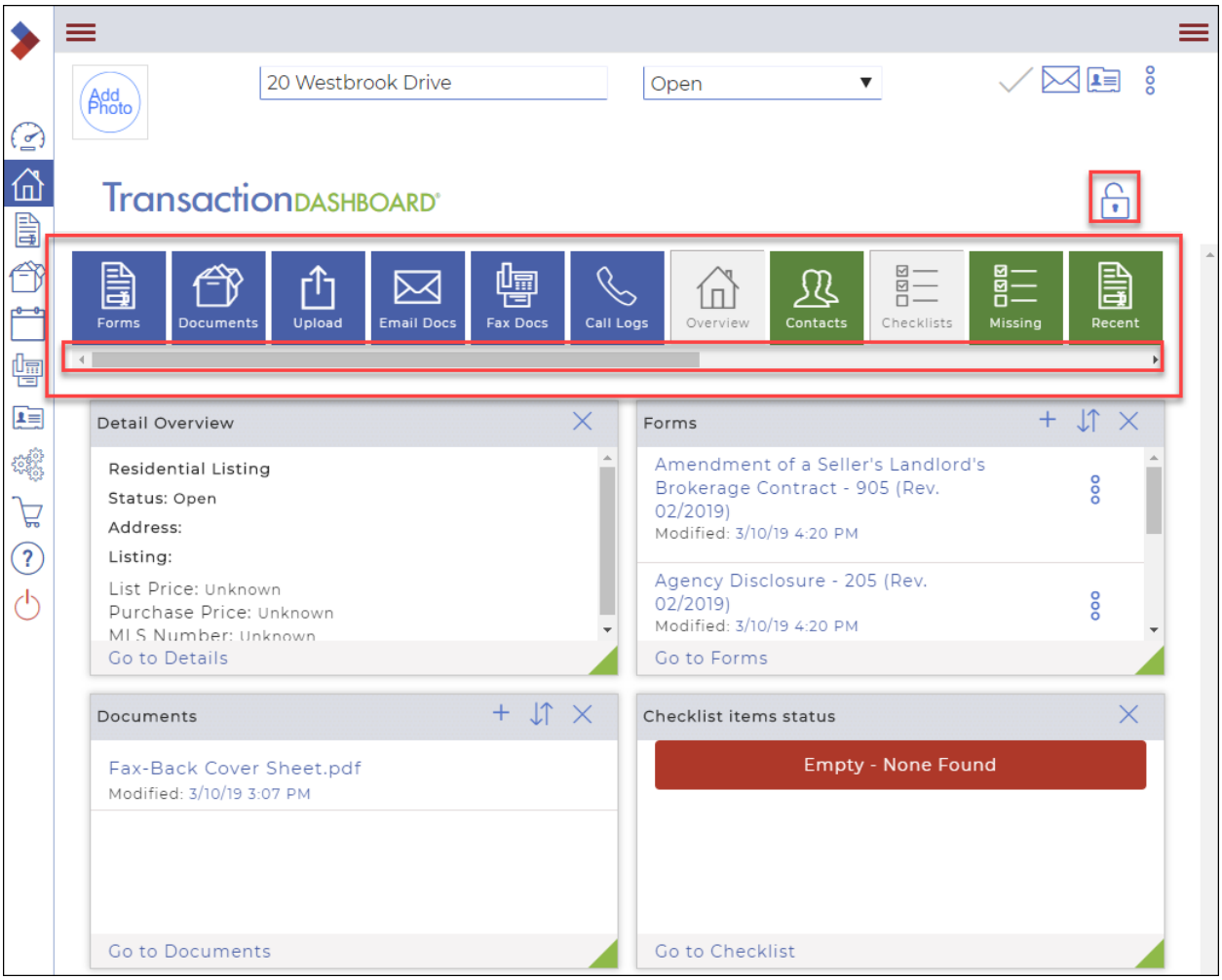
1. In the Sidebar, click **Transaction** .
   Your **Transactions** display.



2. Click the name of any transaction
   Your **Transaction Dashboard** displays.



3. Click **Lock** .
Your dashboard is unlocked, with the Widget tray (note the scroll bar) displayed at the top.



4. Review the available widgets and determine what information will be most useful for you to see in the transaction dashboard.
   For descriptions of the widgets, see "Transaction Dashboard Widgets" below.

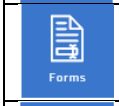
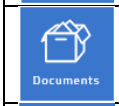
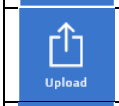
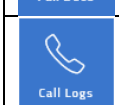
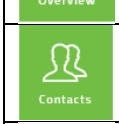
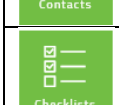
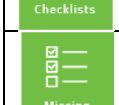
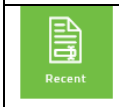
   Note: You can view more Widgets by using the scroll bar directly beneath the widget tray.

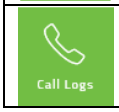
5. Drag and drop widgets onto the highlighted space in the dashboard. Continue to drag and drop widgets until you see the key information you require in your dashboard. Be sure you select the widgets that will be most helpful to you for most of your transactions. For example, if you use checklists as part of a template, you probably want to use the Missing widget (Checklist items not uploaded) so you can see at a glance which tasks are not yet done.
   - The **grey** widgets are the ones that are already on the screen.
   - The **blue** widgets are shortcuts.
     You can use as many of the blue widgets as you like.
   - The **green** widgets provide at-a-glance summaries of information.
     You can use a maximum of six of the green widgets in your dashboard.

6. When you are finished selecting widgets for the transaction dashboard, click **Lock** to lock the dashboard configuration so you do not change it accidentally.
   In the future, whenever you view a transaction, you see the same transaction dashboard.

Transaction Dashboard Widgets

In the table below are brief descriptions of the available Member Dashboard Widgets.

Icon	Widget
	Start Signing A shortcut to create a new signing.
	**Start a New Form** A shortcut to create a new form.
	**Documents** A shortcut to the list of documents attached to the transaction.
	**Document Upload Now** A shortcut to upload one or more documents to this transaction.
	Email Documents A shortcut to email one or more documents attached to this transaction to a recipient email address.
	Fax Documents A shortcut to fax documents or forms attached to this transaction.
	**Add call log** A shortcut to add a call to the call logs for this transaction.
	Detail Overview A shortcut to view a summary of the transaction details.
	**Contacts** A shortcut to the list of contacts for this transaction.
	**Checklist Item Status** Provides a summary list of checklist items for this transaction, and their status. Click a checklist item to go to the item. Click the icon next to the checklist item to change the status of the item.
	**Checklist Items Not Uploaded** Provides a summary list of checklist items for this transaction that have documents that have not yet been uploaded. Click a checklist item name to go to the item. Click the upload icon next to the checklist item to upload the specified document.
	**Most Recent Forms** Provides a list of the most recently updated forms for this transaction. Click the name of the form to open the form. Use the More Options menu to the right of the form name to access the forms menu directly.
	Forms Provides a list of the forms for this transaction. Click the name of the form to open the form. Use the More Options menu to the right of the form name to access the forms menu directly.
	Documents

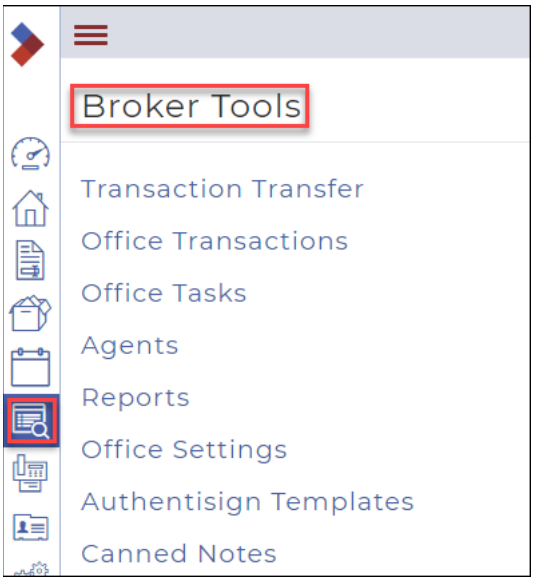
	Provides a list of the documents for this transaction. Click the name of the document to open the document. Use the More Options menu to the right of the document name to access the documents menu directly.
	Rejected Document Reviews Provides a list of the documents for this transaction that have been rejected by their reviewer.
	Important Dates Provides a summary of the key dates for the transaction, such as the listing date, offer date, acceptance date, and closing date.
	Notes A shortcut to the list of notes for this transaction. You can quickly add or remove notes from this widget.
	Tasks A shortcut to the list of tasks for this transaction. Click the name of a task to open the task.
	Completed Tasks A shortcut to the list of completed tasks for this transaction. Click the name of a task to open the task.
	A shortcut to the call logs for this transaction.

Section F: Broker Tools

Broker Tools

Broker Tools provides functionality that is useful to brokers, helping them manage office settings, templates, transactions for the office, and document review. Staff users with Super User access to the system can also access broker tools.

Note: Broker Tools is available to Brokerage Owners as part of CREA WEBForms®. It is not the expanded Broker's Edition that requires purchase.



The section includes:

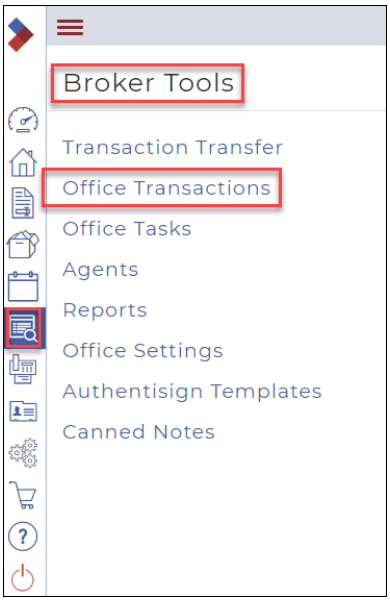
Viewing all transactions in the office

Viewing all transactions in the office

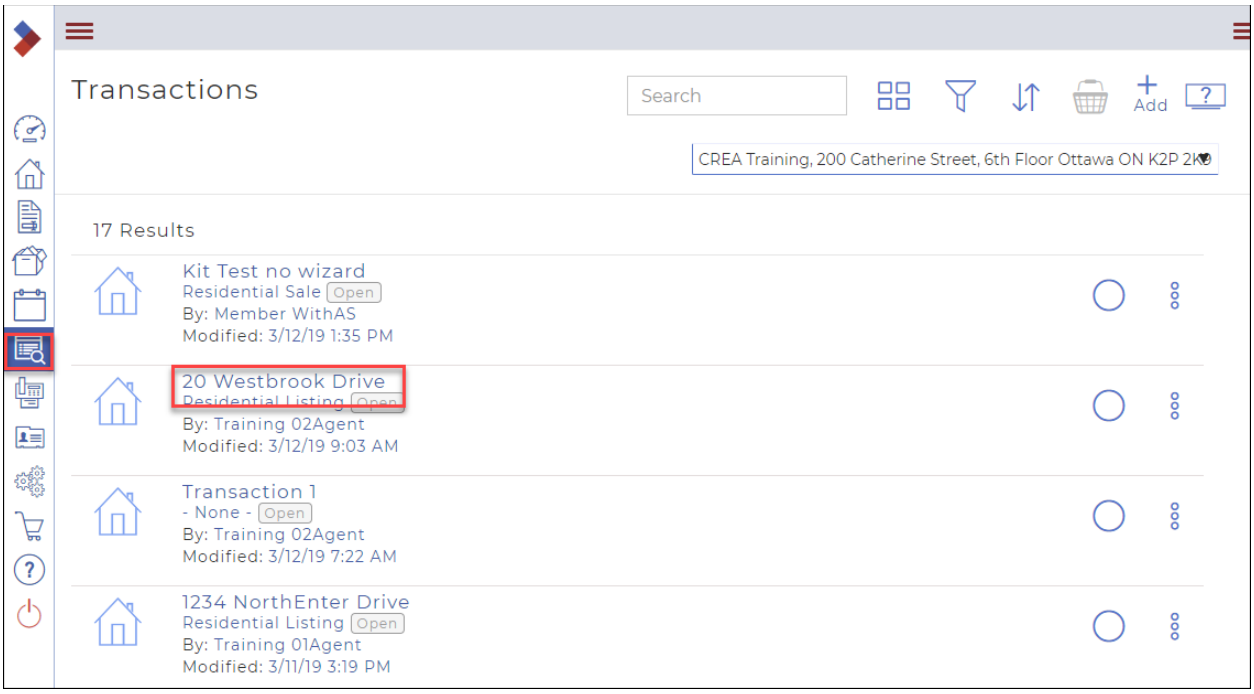
A brokerage owner can view the transactions for the office.

To view all transactions in the office:

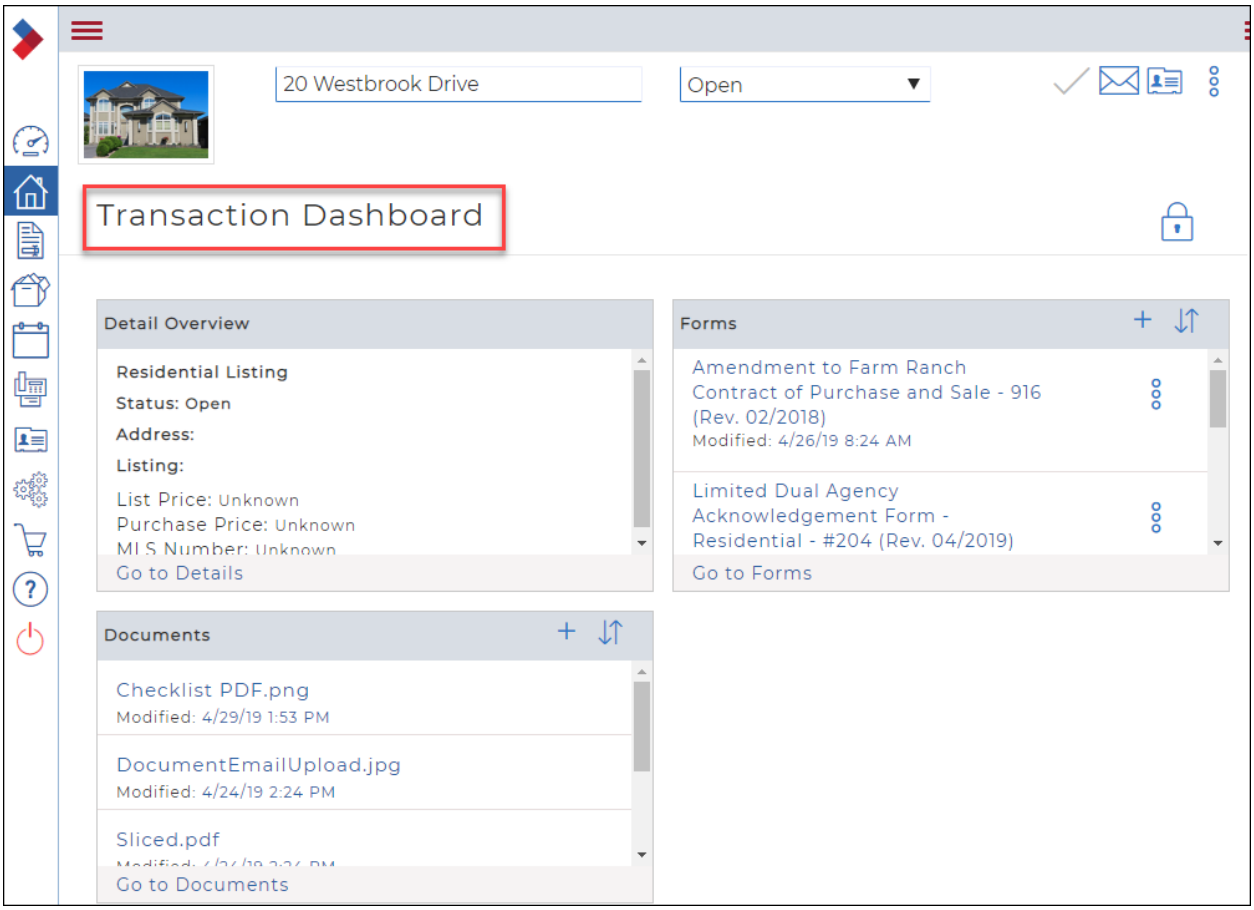
1. In the Sidebar, click **Broker Tools** .
2. The **Broker Tools** window displays.



3. Click **Office Transactions**.
   The **Transactions** list for the office displays.



4. Click the transaction name to view the transaction information.
   The transaction dashboard displays. You cannot make any changes.



Appendix A: Glossary

Apple Contact

Contacts that are imported into the mobile app from an Apple device, such an iPhone or iPad.

Transaction Template

A pre-set and partially populated form created with a specific participant in mind. Templates are used to allow users to quickly fill out their portions of a form before adding them to a signing for a participant to complete the rest of the signing process.

Transaction Wizard

A five-step process in CREA WEBForms® by which a signing is created and sent to participants for completion. Users adjust the signing settings, choose participants, choose documents and forms, set up their documents and forms, and then send the signing to all participants.

Completed Signing

A signing with all the required fields reviewed, signed, initialed, dated, checked, and/or typed in.

Contact

A contact is any company or individual other than a system user whose information is stored in the system. Examples of contacts include: buyers, sellers, outside brokers and referrals, mortgage companies, trust/escrow companies, and lawyers.

Digital Signature

A unique signature, either drawn or typed, used by signers to sign documents and forms during an Authentisign signing.

Document

Any type of information other than a form that you collect regarding the deal from your client or other third party. They are not interactive, and where applicable, are filled in outside of the system. Listing photos, scanned pen-and-paper contracts, scanned receipts of deposit checks, commission disbursements, lawyer letters, commission statements, and client profiles are common examples of documents.

Document/Form Revision

A document or form in a signing that is signed and completed by some, but not all participants.

Document/Form Final Version

A document or form in a signing that is signed and completed by all participants.

Form

Legal contracts that are filled out interactively online. They are usually provided by your board, association, or broker, and are reviewed to ensure compliance and protect all involved parties legally.

Form Template

The original form that is added to the system from your board or association, and then is copied, customized and added to your deals.

General Contact

A contact that is not associated with a particular transaction and is stored in Contacts. For example: a salesperson that frequently uses a staging company adds their contact information to the system as a general contact so the salesperson can access the company's contact information as needed.

Office Contact

A contact that is viewed and used by all users in a single office. Lawyers, and moving companies are examples of office contacts. Office contacts are created and updated by the office admin user.

Participant

Any individuals or users involved in receiving, completing, signing, and returning a CREA WEBForms signing. Can include system users and contacts.

Personal Contact

A contact that is created, viewed, updated, and used by a single user. Buyers and sellers are examples of personal contacts.

Signing

The process by which digital documents and forms are sent, received, signed, completed, and returned in CREA WEBForms

Standalone Form

A filled-in form that is not currently attached to a particular transaction. For example, you can fill in a buyer representation agreement form, but until the buyer locates a property they wish to buy, the form is not yet attached to particular transaction.

Transaction Contact

A contact that is associated with a particular transaction. A transaction contact can begin as a general contact, but the reverse is not necessarily true, unless the user specifies that the transaction contact should be added to the address book when a profile is created or updated.

Appendix B: FAQs

How do I use the new WEBForms® on mobile devices? How do I link my mobile devices?

CREA WEBForms® is responsive in design, which means that it can be used across all devices, including PCs, laptops, tablets, and phones.

How do I link Authentisign to the new CREA WEBForms®?

View **Sending CREA Legacy Transaction Kits to Authentisign** for more information.

For Authentisign documentation, please view the Help available from Instanet Solutions.

Why are some of the forms different in the new WEBForms®

Any prefilled data within forms that are attached to a template will NOT migrate over and will need to be re-entered. Users will need to verify and update any clauses that had been included within their templates.

How do I create clauses?

Both **Clauses** and **Transaction Templates** are now accessed by clicking the **Setup** icon in the Sidebar.

View information on Working with clauses.

View information on Creating a personal clause.

View information on Inserting a clause into a form.

Appendix C: Videos

Quick Start

Quick Start Transaction Wizard Intro

Quick Start Transaction Wizard Step 1

Quick Start Transaction Wizard Step 2

Quick Start Transaction Wizard Step 3

Quick Start Transaction Wizard Step 4

Quick Start Transaction Wizard Step 5

Forms

Adding a New Form to a Transaction

Adding an Individual Form to a Transaction

Adding Multiple Standalone Forms to a Transaction

Changing My Form Settings

Copying a Form to Documents

Copying a Form

Creating a New Transaction from an Individual Form

Creating a New Form

Deleting a Form from a Transaction

Deleting a Standalone Form

Deleting Multiple Standalone Forms

Deleting Multiple Transaction Forms

Downloading a Standalone Form

Downloading a Blank Form

Downloading a Form from a Transaction as a ZIP File

Downloading a Standalone Form as a ZIP File

Editing a Form

Editing a Transaction Form

Emailing a Form

Emailing a Form from a Transaction

Emailing Multiple Forms

Emailing Multiple Forms from a Transaction

Faxing a form

Faxing a Form from a Transaction

Faxing Multiple Transaction Forms

Inserting a Clause into a Form

Previewing a Form

Printing a Transaction Form

Printing Multiple Forms from a Transaction

Renaming a Form

Saving Multiple Forms as a PDF from a Transaction

Transactions

Adding a Contact to a Transaction

Adding a New Call Log to a Transaction

Adding a New Form to a Transaction

Adding a Photo to a Transaction

Adding a Checklist to a Transaction

Adding Multiple Standalone Forms to a Transaction

Adding a Note to a Document in a Transaction

Applying a Template to an Existing Transaction

Archiving a Transaction

Changing My Transaction Settings

Creating a New Transaction from Individual Forms

Creating a Transaction with a Template

Deleting a Document from a Transaction

Deleting a Form from a Transaction

Deleting a Transaction

Deleting Multiple Documents from a Transaction

Deleting Multiple Transaction Forms

Downloading a Document from a Transaction as a ZIP File

Downloading a Form from a Transaction as a ZIP File

Duplicating a Transaction

Editing and Deleting a Contact in a Transaction

Editing a Transaction Form

Editing Transaction Details

Emailing a Document from a Transaction

Emailing a Form from a Transaction

Emailing Multiple Forms from a Transaction

Emailing Multiple Documents from a Transaction

Faxing a Document from a Transaction

Faxing a Form from a Transaction

Faxing Multiple Transaction Documents

Faxing Multiple Transaction Forms

Marking a Task as Complete in a Transaction

Printing a Transaction Form

Printing Multiple Forms from a Transaction

Removing a Sharing Group from a Transaction

Saving Multiple Forms as a PDF from a Transaction

Sharing a Transaction

Starting a Transaction

Uploading a Document to a Transaction

Viewing the Call Log from the Transaction View

Transaction Templates

Applying a Template to an Existing Transaction

Creating a New Transaction Template

Creating a Transaction with a Template

Deleting a Transaction Template

Editing a Transaction Template

Documents

Adding a Note to a Document in a Transaction

Changing My Document Settings

Copying a Form to Documents

Copying a Document

Creating a Folder

Deleting a Document from a Transaction

Deleting a Document

Deleting Multiple Documents from a Transaction

Downloading a Document as a ZIP File

Downloading a Document from a Transaction as a ZIP File

Emailing a Document

Emailing a Document from a Transaction

Emailing Multiple Documents

Emailing Multiple Documents from a Transaction

Faxing a Document

Faxing a Document from a Transaction

Faxing Multiple Documents

Faxing Multiple Transaction Documents

Marking up a document

Merging a Document

Moving a Document

Moving Multiple Documents

Removing a Sharing Group from a Document

Removing a Sharing Group from a Folder

Renaming a Document

Renaming a Folder

Sharing a document

Slicing a Document

Uploading a Document

Uploading a Document to a Transaction

Uploading a Document via Email

Viewing My Documents

Clauses

Adding a Clause

Creating a Clause Folder

Creating a Personal Clause

Deleting a Clause

Editing a Clause

Inserting a Clause into a Form

Moving a Clause

Previewing and Editing a Clause

Understanding Clauses

Contacts

Adding a Contact

Adding a Contact to a Transaction

Editing and Deleting a Contact

Editing and Deleting a Contact in a Transaction

Searching for a Contact

Checklists & Tasks

Adding a Checklist to a Transaction

Creating a Checklist

Creating a New Task

Deleting a Checklist

Deleting a Task

Editing a Task

Marking a Task as Complete in a Transaction

Tasks Overview

Teams/Sharing Groups

Creating a Sharing Group

Deleting a Sharing Group

Editing a Sharing Group

Removing a Sharing Group from a Document

Removing a Sharing Group from a Folder

Removing a Sharing Group from a Transaction

Sharing a document

Sharing a Transaction

Setting Up

Adding Branding to your Account

Changing My Document Settings

Changing My Fax Settings

Changing My Form Settings

Changing My Notification Settings

Changing My Transaction Settings

Creating a Custom Type

Deleting a Custom Type

Deleting a Service Provider

Editing a Custom Type

Editing a Service Provider

Removing Branding

Customizing your Dashboards with Widgets

Adding, Moving, Resizing and Removing Widgets

Using the Get Started Widget

Using the Transactions Widget