Document Management 101: Digital Documents and Signatures

INSTITUTE OF REAL ESTATE

Document Management 101

Digital Documents and Signatures

FMLS Institute of Real Estate
5457 Roswell Road
Atlanta, Georgia 30342
404-255-8660

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About FMLS

First Multiple Listing Service, Inc. (FMLS) is the premier data services provider for real estate professionals in Georgia. FMLS was founded by a handful of real estate brokers in Atlanta in 1957. Today, membership is growing quickly and is spreading in every direction throughout Georgia and the Southeast. Currently, FMLS has thousands of offices and serves tens of thousands of real estate agents. The FMLS listing database contains active listings located all over Georgia and the Southeast. A network of computers, servers and third party support vendors enable member offices and agents to have immediate electronic access to all listing information maintained in the FMLS premier web-based system, Fusion. In addition to property data, enhance listings using photos, virtual tours, tax information, mapping, school information, census data and more!

Real estate companies that belong to FMLS enjoy maximum coverage and exposure for their clients. An independent study shows FMLS listings sell, on the average, much faster than those placed with other multiple listing services.

Through our main office and two satellite locations, FMLS members have access to; help desk support 7 days a week; on-site hands on training; online training; and free CE classes. Also, real estate supply centers are available at all three locations.

Our commitment to members

FMLS' mission is to "help fulfil financial dreams by providing superior technology, service, and training to facilitate the success of our members."

FMLS Products and Services

Free Products and Services

Fusion	Comprehensive Statistical Reports
Realist Tax	FMLS Stats
FormsPro	StatsPro
eSign	Xceligent
1st Addition	Contact Website
DocuPro	Georgia Open Houses
FIND	ListingBook
GoFMLS	Property Panorama
RatePlug	Member Discounts
DPR	
SafeRent	

Georgia Real Estate Commission Continuing Education Course Guidelines

All classes are on a pass/no pass system. Please review the policies below regarding attendance, cell phones, recruiting and student approval.

Continuing Education

All individuals who hold an active real estate license are required to complete 24 hours of Commission approved continuing education during each four-year renewal period. (Licensees whose license numbers are less than 100,000 are not required to complete continuing education for renewal). A renewal period begins four years prior to the current renewal due date. For example, Commission approved continuing education must be completed between April 1, 2007 and March 31, 2011 for a renewal due date of March 31, 2011.

A licensee who has successfully completed an approved course to meet his continuing education credit may not repeat that course for credit unless at least one full year has passed. The course may be repeated on the 366th day to receive CE credit.

Attendance Policy

To receive certification for this course, under the school approved by the Georgia Real Estate Commission, for three hours of continuing education credit, all students must be present and on time for all classroom presentations. This requires students to be seated and ready at the announced commencement time and promptly return from all breaks, being ready to participate in all exercises. Attendance is taken at the beginning, at the resumption after breaks and again at the end upon completion of the course. A no make-up policy for missed classroom presentations is hereby adopted. Failure to comply will nullify the student’s opportunity to receive the designated credit.

Cell Phones

The use of cell phones and pagers during the presentations is expressly prohibited. Please set all equipment in the vibrate or off mode. Failure to comply will nullify the student’s opportunity to receive the designated credit.

Prohibition of Recruiting (520-1.B4)

Recruiting for employment opportunities for any real estate brokerage firm is not allowed in this case or on school premises. Report promptly any effort to recruit by anyone to:

Michele Morris at 678-904-8497, FMLS Institute of Real Estate, P.O. Box 420128, Atlanta, GA 30342 - or - The Georgia Real Estate Commission.

Notice of Student Approval (520-1.B2)

Document Management: Digital Document Storage was approved as a Continuing Education course, good for 3 hours of Continuing Education Credit, School Code: 64388.

The approved instructors are Kevin Theobald, Bob Ramsey, Joi Hardiman, Sallie Mobley, Richard Renton, Kay Burt, Jan Beaudoin, and Pat Deneen.

Course Credit

Continuing Education Credits will be entered within two weeks. To verify your credit, you must call the Georgia Real Estate Commission (GREC): 404-656-3916, or visit http://www.grec.state.ga.us/info/wcls.login. You will need to enter your license number and set up a password to gain online access to GREC transactions.

Supported Operating Systems and Browsers

Windows XP SP3	Internet Explorer 7 or 8, Firefox 4.0 and above, Google Chrome or Safari 5.0 and above
Windows 7	Internet Explorer 8 and 9 and Internet Explorer 10 Desktop, Mozilla Firefox 4.0 and above, Google Chrome and Safari 5.0 +
Windows 8	Internet Explorer 10 Desktop
MAC OS X v 10.5-10.6	Safari 5.0 or higher, Mozilla Firefox 4.0 and above, Google Chrome
MAC OS X v 10.7	Safari 5.0 or higher with Flash 11.4+ Mozilla Firefox 4.0 and above, Google Chrome
MAC OS X v 10.8	Safari 6.0

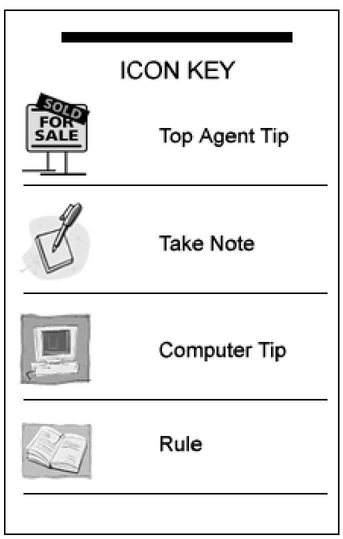
Objectives

At the end of this course, you will be able to:

- Access and navigate FormsPro.
- Use FormsPro to create, print and email digital real estate contracts.
- Create Forms Packages to streamline FormsPro usage.
- Deactivate clients and folders.
- Use Preferences to customize FormsPro, manage Forms Packages and restore deactivated clients and folders.
- Access and navigate FMLS eSign.
- Create an electronic signing session; upload documents to be signed; and add signing locations to contracts.
- View a signing session's progress/history.
- Create signing templates for non-GAR and/or non-R.E.Forms.

Icon Key

Look for these helpful icons as you advance through this guide.

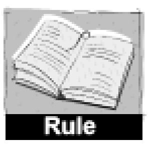


Logging in to FMLS

To log in to FMLS, you must be an FMLS member with your own user name and password. Your broker must submit a Computer User Form to obtain these. Do not share your user name or password with other agents or clients.

FMLS requires bi-annual password change for security purposes. You will be prompted to enter your old password and then your new password. The password can contain both letters and numbers and must be at least 6 characters in length. You cannot use the same password twice.

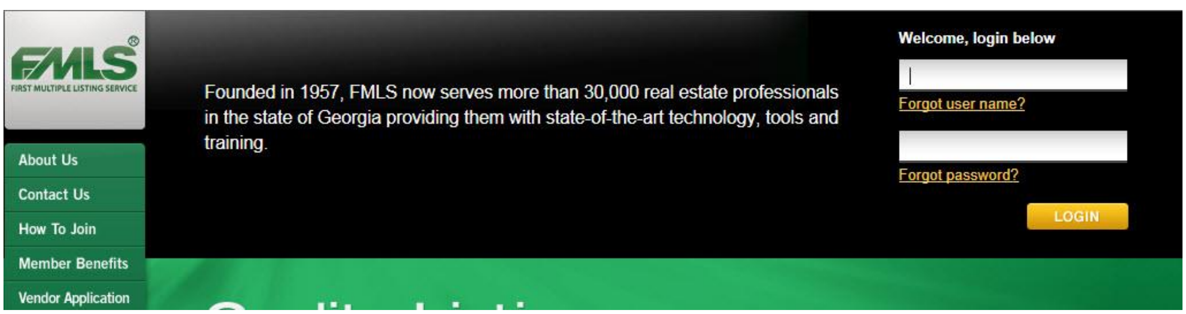
If you need to change your password before the bi-annual change, go to the FMLS.com home page, hover over My FMLS on the left navigation bar, and click on Change Password.



Disclosing your user name and password to another party (other than a team member or assistant within that office) can result in a fine of $1000 and termination of service. (Rule 11.1)

Logging in to www.FMLS.com

1. From your computer desktop, open an Internet browser window.
2. Navigate to **www.fmls.com**.
3. Enter your User Name and Password and click **Login**.



How We Communicate with You

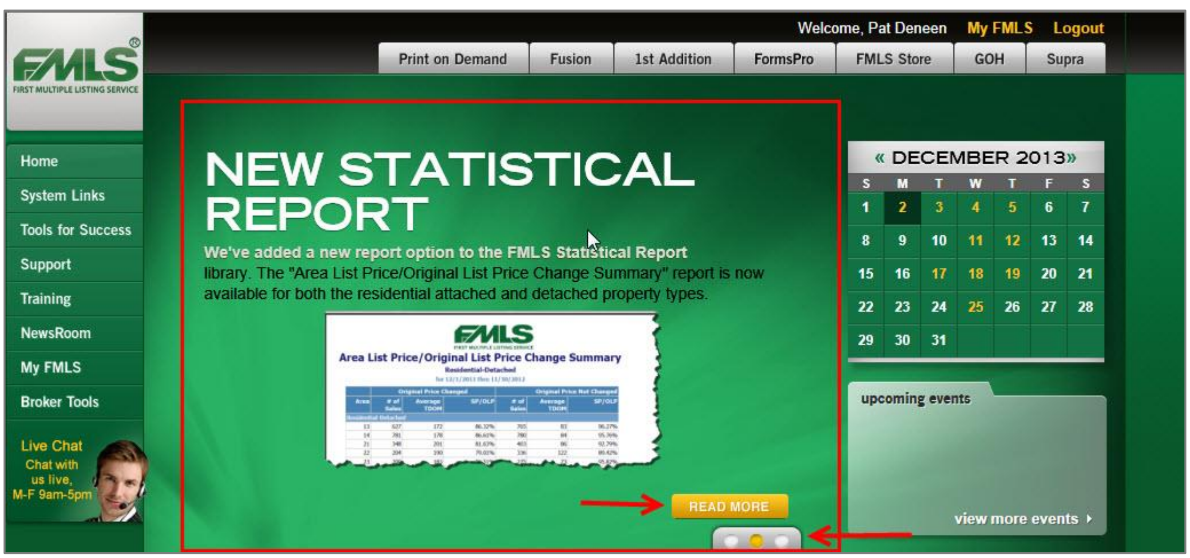
At FMLS, we provide more to our members than just access to a database of listings! We use several methods to pass along important information including Real Estate market trends (both locally and nationally); state and local news that influence our market; updates and bulletins when our software products are affected; and more! Please take advantage of one, or all of the methods.

Email

Our primary method of communication with our members is email. FMLS will send electronic communications regarding important changes to our products and services. Please be sure to add FMLS to your trusted sender list.

FMLS.com

The FMLS.com home page is another important and central communication channel we have with our members. It acts as command central. The story carousel rotates through 3 very newsworthy topics which are changed regularly, giving you fresh, relevant information! Pause for a moment to read a few lines to determine whether today's topics are of interest to you. If they are, click on the **Read More** button to see the whole story. The topics automatically rotate on the screen, but you can click to flip to the stories faster if desired.

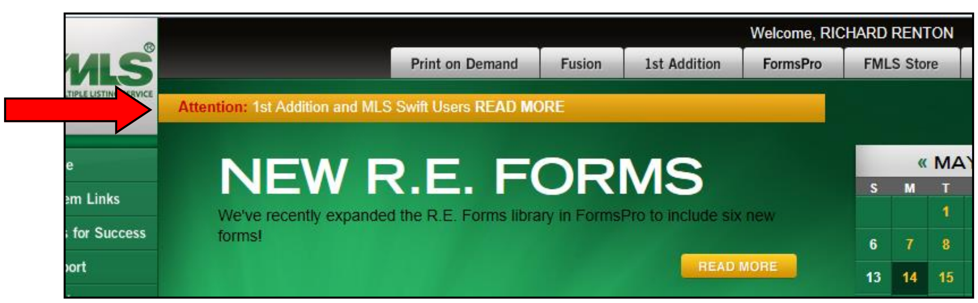


NewsRoom

The **NewsRoom** button on the left navigation bar contains an archive of stories previously included in the carousel. Check the NewsRoom regularly to make sure you didn't miss something important, or to re-read an article!

Message of the Day

Message of the Day is another FMLS.com feature you'll want to watch for. Critical issues such as those pertaining to agent safety, a software issue or FMLS hours of operation are there.



Social Media

Additionally, FMLS posts notices and real estate driven content to three different social media channels: Twitter, Facebook, and LinkedIn. Yes! Social Media! FMLS is involved in Social Media because it is so popular in today's technology-driven world. Twitter and Facebook content contains both FMLS and real estate industry news. LinkedIn concentrates more on FMLS news and professional development. Like us on Facebook, follow us on Twitter, and join the FMLS group on LinkedIn. You'll be glad you did – and you'll have information most of your counterparts don't have!

Follow us on Twitter
@flms_news
@flms_alerts

Like us on Facebook
http://www.facebook.com
FMLSmembers

Join the FMLS group on LinkedIn
www.linkedin.com/groups?gid+1889382

Document Management Overview

What is Document Management? Document Management is a set of software tools to store, retrieve, manage, and share important documents associated with a client or transaction.

Transaction information may be located in many different places and in many different formats.

- Buyer or Seller owned documents
- FormsPro
- Personal Files
- Lenders
- Inspectors
- Appraisers

Quickly finding the document you need can be difficult and affect the service you provide your clients, and could affect contract negotiations.

Document Management brings all client/transaction documents together in one place, making your job easier!

What are the benefits?

- Global and any-time access to documents via the Web
- Long term storage (10 years)
- Unlimited electronic storage space
- File size up to 10MB
- Eliminate/Reduce paper storage space
- Protection against fire and water damage
- Document sharing saves time and improves productivity

How Do Documents Get Into a Document Management System?

Electronic files are quickly uploaded from your computer

Paper documents are either

Scanned to electronic format then uploaded (scanner/copier)

Or faxed into the document system.

Documents in the possession of others may be

Uploaded electronically by the owner, or

Faxed into the document management system by the owner, or

Emailed into the document management system by the owner

How is Document Management Used?

- Attach documents to your FMLS Listings
- Store and retrieve client documents
- Share documents with clients and others
- Task management and tracking for each client
- Storage and retrieval for past transactions

Getting Started with Document Management

From the moment the Listing Agreement or the Buyer Brokerage Agreement is signed, paperwork begins to accumulate for the transaction. Getting those documents into the Document Management system right away means that you can retrieve the documents quickly no matter where you are, and you can share important information with others.

Four FMLS tools combine to provide you with comprehensive document management – **FormsPro, eSign,** the **Fusion Document Manager**, and **DocuPro**.

Each of these tools will fit into your workflow so that you can accomplish your everyday tasks faster with automation. How? Complete your contracts in FormsPro for buying and selling clients; get the documents electronically signed using eSign; store documents in DocuPro; use Document Manager to manage it all.

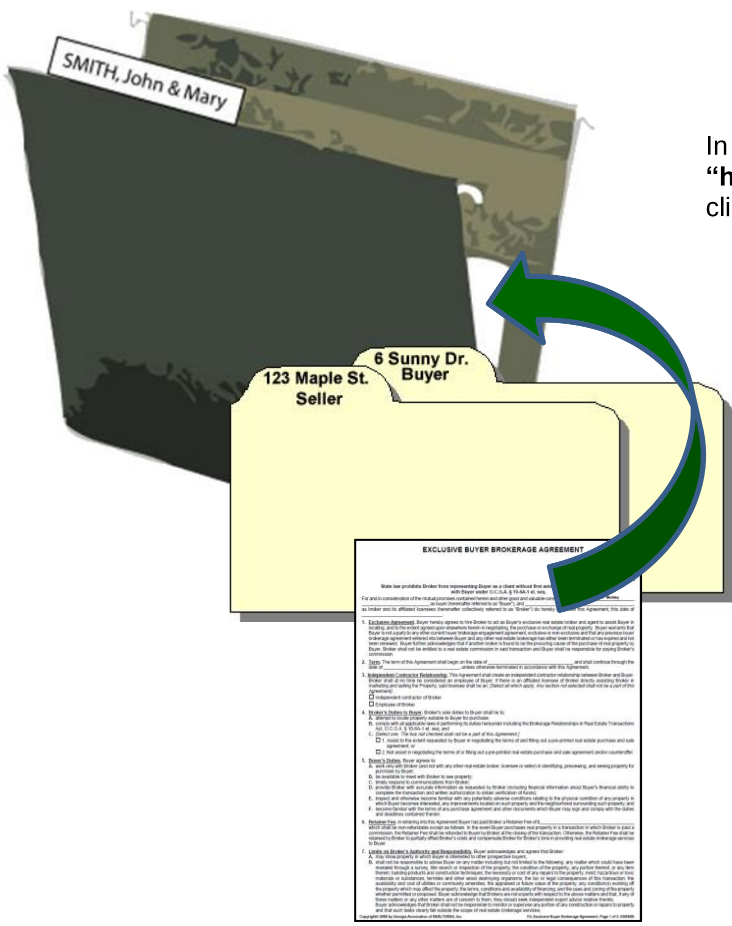
FormsPro and **eSign** are covered in the following pages. The remaining two – **Fusion Document Manager** and **DocuPro** – will be covered in the **Document Management 201: Digital Document Storage** class (3 CE hours). In order to benefit fully from FMLS Document Management, you will want to take both classes.

FormsPro Overview

Georgia state law enables real estate licensees to take advantage of pre-printed contracts that have been prepared by legal counsel. FMLS has long offered free access to forms libraries through its software–most recently through Fusion. This one-click access provides anytime access to the forms, increasing agent productivity.

FormsPro is the first tool in the FMLS Document Management System and makes using standardized forms easy – the preparer simply fills in the blanks. In addition, FormsPro provides simple tools for printing or emailing the completed forms to clients for review; and for storing, organizing and retrieving them

FormsPro's streamlined design allows agents to quickly add a new client, add one or more transaction folders for the client, add forms to a folder, and complete the forms. This keeps all forms related to a single client digitally stored in one location. Also included is the ability to create forms packages so that you can add forms to a folder with just one click of the mouse.



In FormsPro, you will set up **one "hanging"** folder for each of your clients.

You can then create file folders for each **property** or **transaction** that a Client has. One Client **"hanging"** folder can contain multiple file folders or transactions.

Every form you use will be placed into the appropriate **file folder** for the specific transaction and for the specific **Clien**t.

Logging into FormsPro

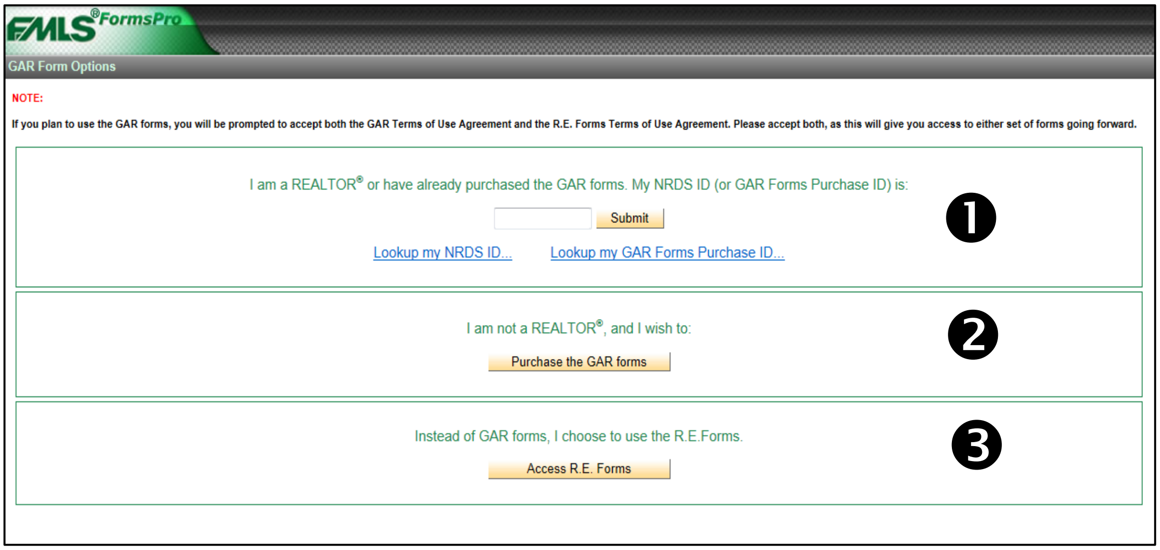
1. From the FMLS.com home page, click on the tab for **FormsPro**.

2. FormsPro may also be accessed from Fusion. Hover over the **Documents** tab and click on **FormsPro**.

Real Estate Forms Licensing

FMLS designed FormsPro to provide access to preprinted contracts. Two separate contract libraries are available in FormsPro, both of which were written by real estate law firms. One library was written by the Georgia Association of Realtors' (GAR) legal counsel. Agents who are members of GAR may use the GAR library of forms free of charge. Agents who are not GAR members may pay $199 per year to GAR to use that library. Agents who are not members and who do not wish to pay the $199 fee to GAR may take advantage of the second library, R.E. Forms, which is provided free of charge to all FMLS members. Again, a real estate law firm wrote this library. The firm was employed by a partnership between FMLS and Georgia MLS.

The first time you click to enter FormsPro from FMLS.com or Fusion, the following screen appears with choices for access to real estate contracts:

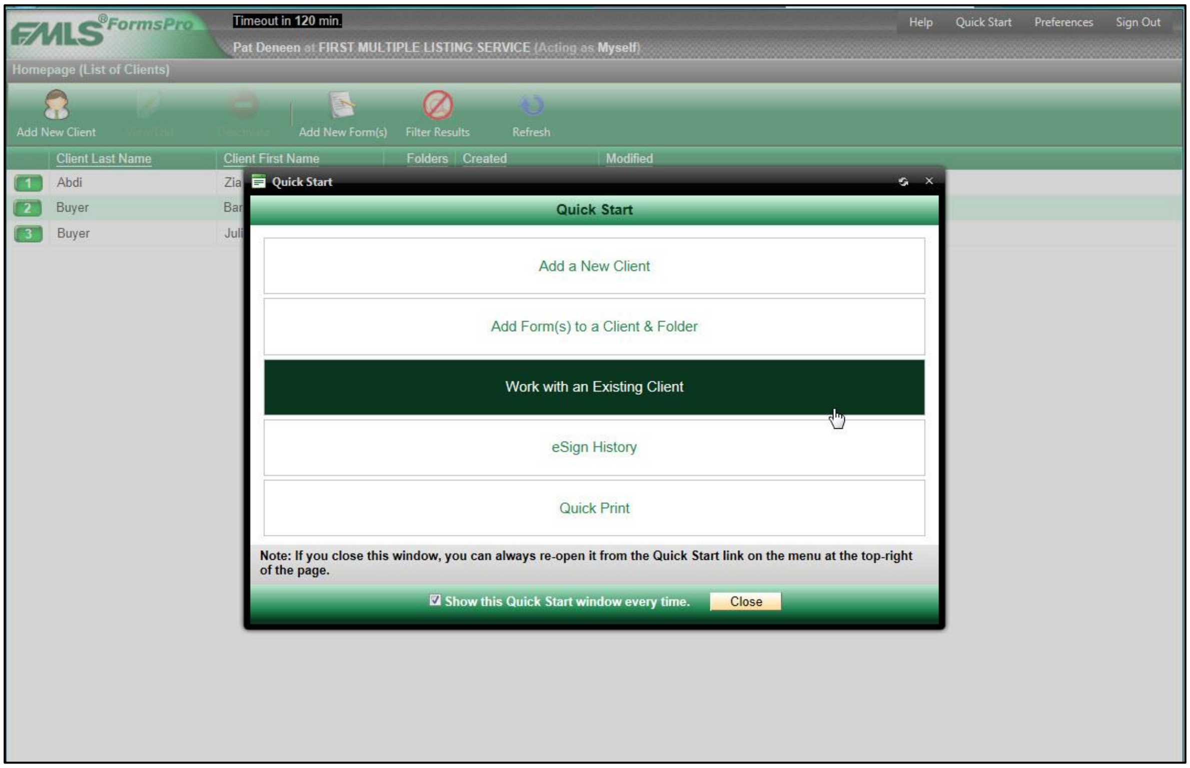


Please read the screen carefully before choosing one of the three methods. Once you have made a choice, you will be passed through to FormsPro on your next and subsequent visits without having this screen display.

❶	If you are a GAR member, enter your NRDS ID number in the box provided and click on the **Submit** button. If you do not remember your NRDS ID, click on the link to search the GAR database by email address or Last Name. The NRDS ID number you need will be emailed to you. If you have trouble locating your ID number, please contact your local board or call the GAR office at 770-451-1831.
❷	If you are not a NAR/GAR member and would like to pay the $199 fee in order to use GAR forms, click on the **Purchase the GAR forms** button. You are directed to a page on the GAR website where you will provide your personal information and a credit card number. American Express, MasterCard and Visa may be used for payment. You will receive a Forms ID number from GAR. You will use this number in the first box to gain access to forms.
❸	If you prefer not to pay the GAR $199 fee, you may use the FMLS/GAMLS forms free of charge by clicking on the **R.E. Forms** button. A short "Terms of Use" document should be read and accepted in order to continue to FormsPro and the R.E.Forms.

FormsPro Home Page

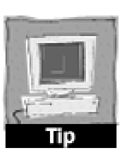
When you access FormsPro, the home page opens with a Quick Start window.



Use the links in the window to access features of FormsPro quickly. Included are:

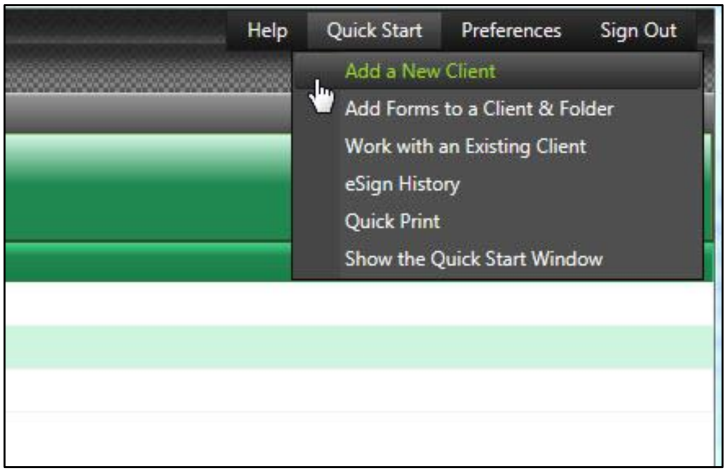
Link Name	Usage
Add a New Client	Use this link to set up a new client in anticipation of filling in forms for a transaction
Add Form(s) to a Client & Folder	Use this link to place an additional form or forms in an existing client's folder.
Work with an Existing Client	Use this link to locate an existing client and continue working.
eSign History	Use this link to view a listing of your active eSign sessions.
Quick Print	Use this link to print blank forms.

Select the option you want, or click **Close**.



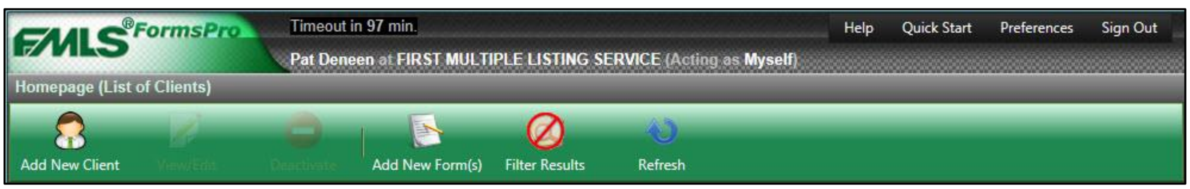
*If you would prefer not to see the Quick Start window, just **uncheck the box** at the bottom of the window.*

You can access the Quick Start options at any time, by clicking the **Quick Start link** in the upper right corner of the screen.



Home Page Tool Bars

The tool bar contains various functions available in FormsPro.

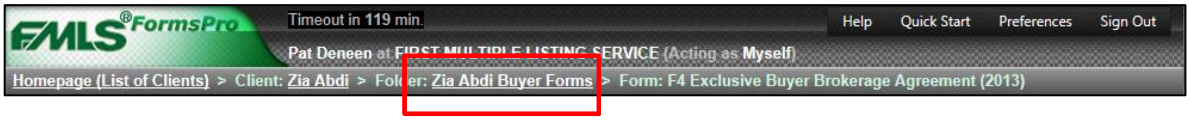


The table below defines the items found on the Home Page tool bar.

Item	Description
Timeout	The time out counter is a security feature, indicating the amount of time left in the current session. If you leave your computer, the system logs you out of FormsPro at the end of the session.
Help	Access an on-line guide for both users and brokers.
Quick Start	Access the Quick Start links as well as the Quick Start menu.
Preferences	Set preferences to tailor FormsPro to your business needs.
Breadcrumb Bar	Provides links back to each previous page you navigated through to get to the current page.
Icon Bar	Icons link to various functions in FormsPro. This bar is dynamic and changes depending on the task you are doing in FormsPro.

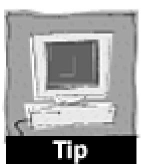
Using the Breadcrumb Navigation Bar

The Breadcrumb Navigation Bar is a grey bar located directly underneath the FormsPro logo. As you open items in the system, that item appears in the breadcrumb bar. Use this bar to move backwards to previous screens by clicking on the white underlined text to move to a previous screen.



Adding a New Client

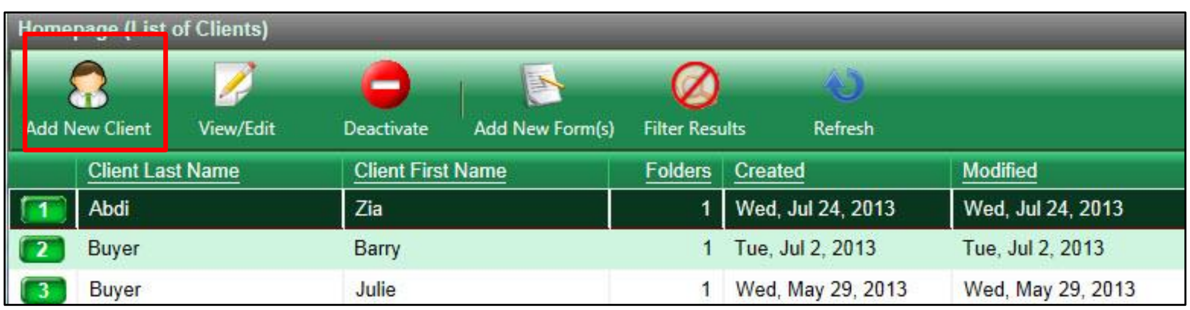
Before you can work with FormsPro, you must add the client to the FormsPro system. FormsPro uses the client information to populate fields in the forms that you create later. Take the time to be complete and thorough when setting up the client.



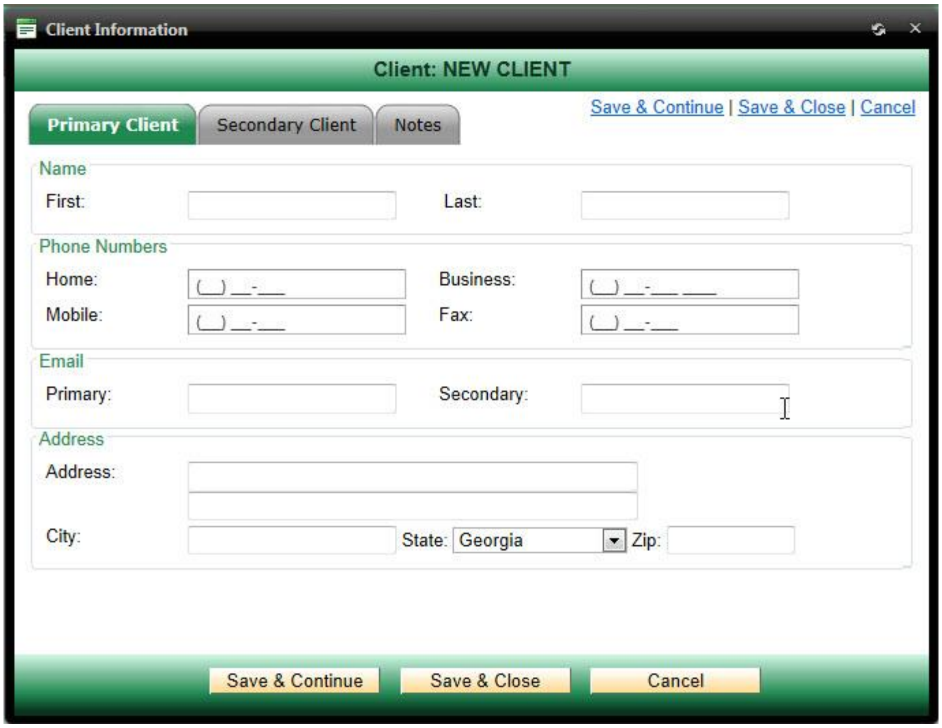
Creating the client record is setting up a "hanging" folder for each of your clients.

To add a client to FormsPro:

1. From the FormsPro Home page, click on **Add New Client** – OR – from the Quick Start Window click on the **Add a New Client** link.



The Client Information window appears:

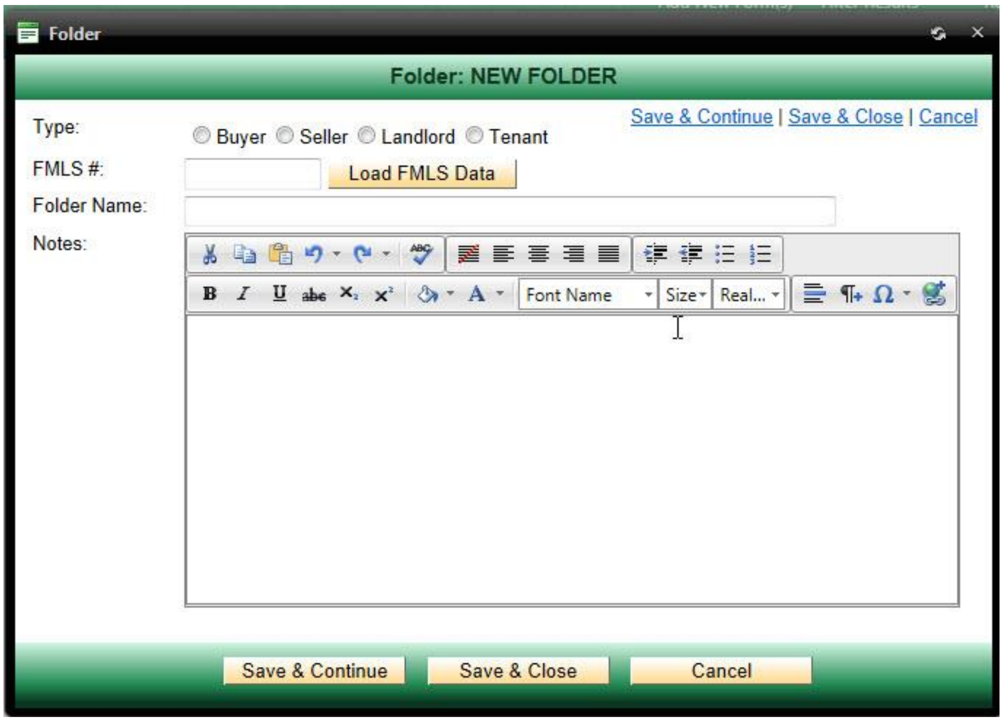


2. Complete the fields on the screen. Only the Last Name field is a required field.
3. If there is a secondary client, click the **Secondary Client** tab.
4. To add notes, click the **Notes** tab.
5. Choose your Close option.

Close Option	What is does
Save & Continue	Saves the client information, and then opens the New Folder screen to set up the property folder. Selecting this option runs you through a “mini-wizard” where you can create the property folder and the forms.
Save & Close	Saves the client information, and then closes the window.
Cancel	Cancels the addition of this client.

Creating a Folder for a New Client

If you selected **Save and Continue**, you can create file folders for each property or transaction that a client has. One client "hanging" folder can contain multiple file folders or transactions. Place every form you use into the appropriate file folder for the specific transaction and for the specific client.

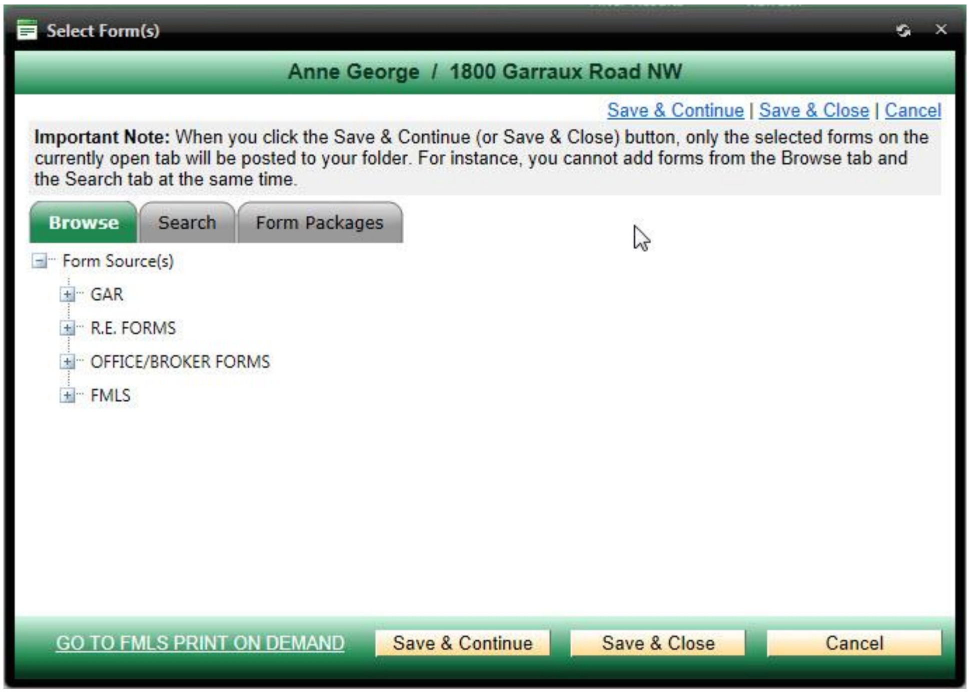


1. Click to select a Type for your client: Buyer, Seller, Landlord, and Tenant.
2. Type an FMLS number in the box provided, and then click on the **Load FMLS Data** button. This loads property profile data from FMLS into the folder, which will auto-populate into forms.
3. If you do not have an FMLS# at this time, type a name for the folder in the box provided. The Folder Name field is required.
4. Type any notes desired in the box provided.
5. Click on the **Save & Continue** button to add a form to the folder. (You may click on **Save & Close** to save the folder without adding a form at this time – you can add forms later.)

If you are just beginning your work with a listing client, and do not yet know the FMLS#, leave that box blank. In the same way, if you do not yet know the address of the property your buying client will make an offer on, you may want to name the folder "Preliminary Contracts." You may change the name of the folder and enter the FMLS# later. Clicking on ***Load FMLS Data*** *will upload information from the FMLS database and auto-populate forms at any time.*

Adding Forms to a Folder

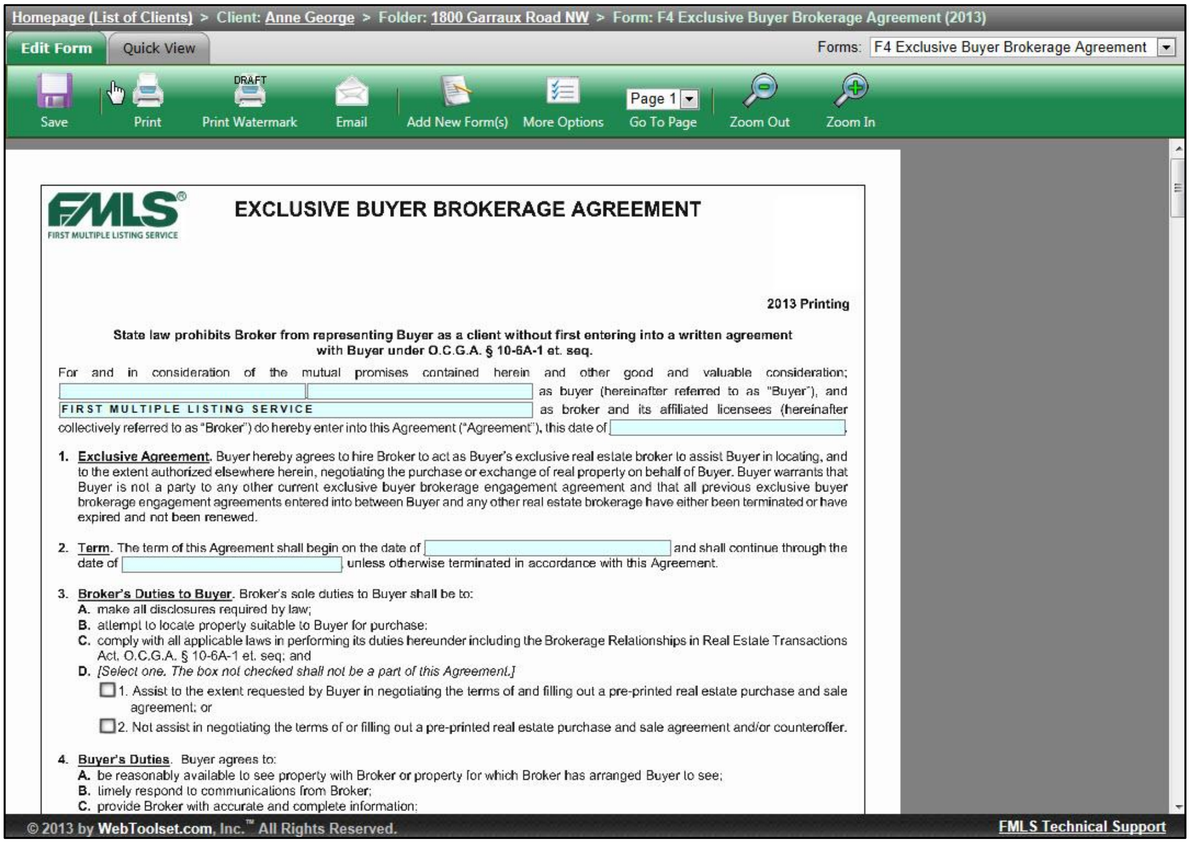
To keep things organized, place every form you use into the appropriate file folder for the specific transaction and for the specific client.



To add forms to a folder:

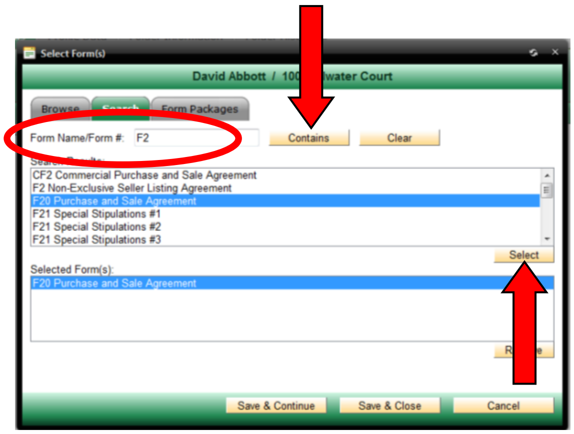
1. From the Select Forms screen, find the form using the **Browse** tab. Click on the **+** sign to open a folder and view its contents.
2. Click on the **+** sign again to open a sub-folder. (Alternatively, click on the **Search** tab to locate the form using a portion of the form name. See below.)
3. Click to place a check in the box next to the form you wish to add to the folder. You may add several forms to the folder at once by checking several boxes.

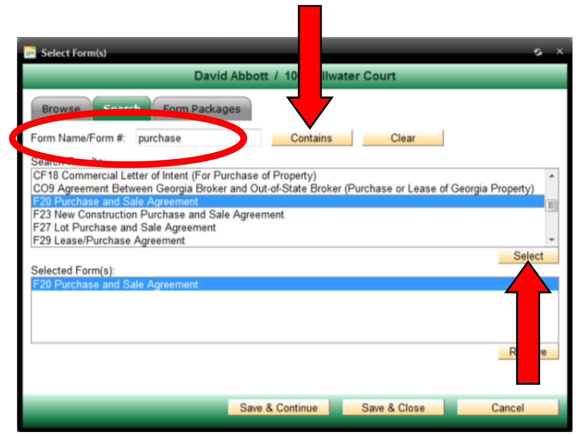
4. Click on **Save & Close** to add the forms to the folder and move to a list of forms ready for entering information.



Using the Search Tab to Find Forms

As an alternative to selecting the forms from the list, you can use the Search tab to find a form using its number (F4, F20, etc.), or by typing a word or words contained in the form. Use the **Select** button to add the form.

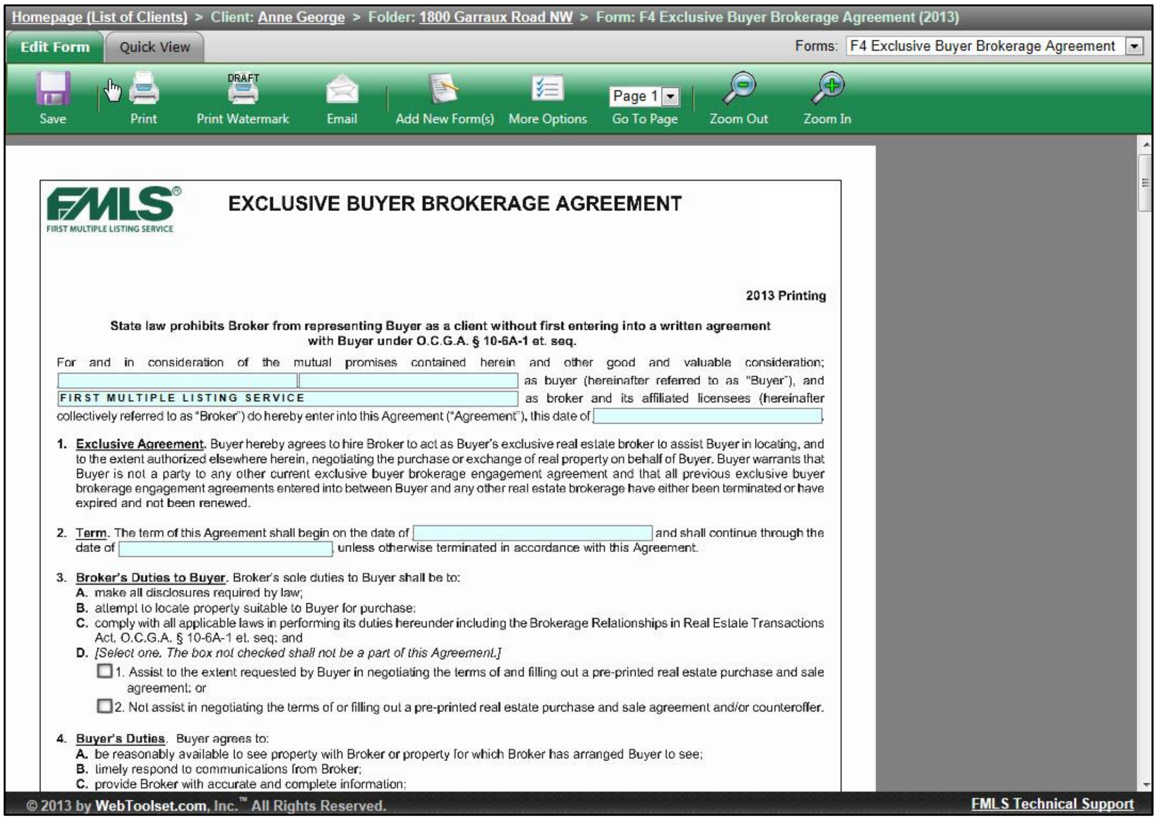




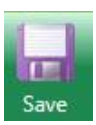
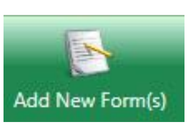
Completing Forms

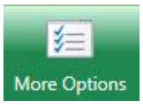
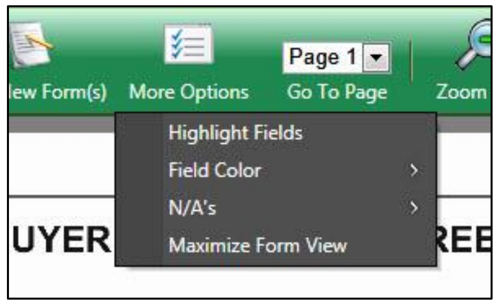
1. Double click to open the folder that contains the form you want to complete, if needed.

2. Double click on the form to open. The Form appears:



Notice that the icons on the toolbar change.

	Use the Save icon to save the form as you work and at form completion. Once saved, it sets the historical restore point.
 	Use the Print icon to print the completed form – with or without watermarks.
	Use the Email icon to email the form (with or without watermarks). If you have a form open and choose email option, only the open form will be emailed.
	Use this icon to access the Select Forms window to add additional forms to the folder.

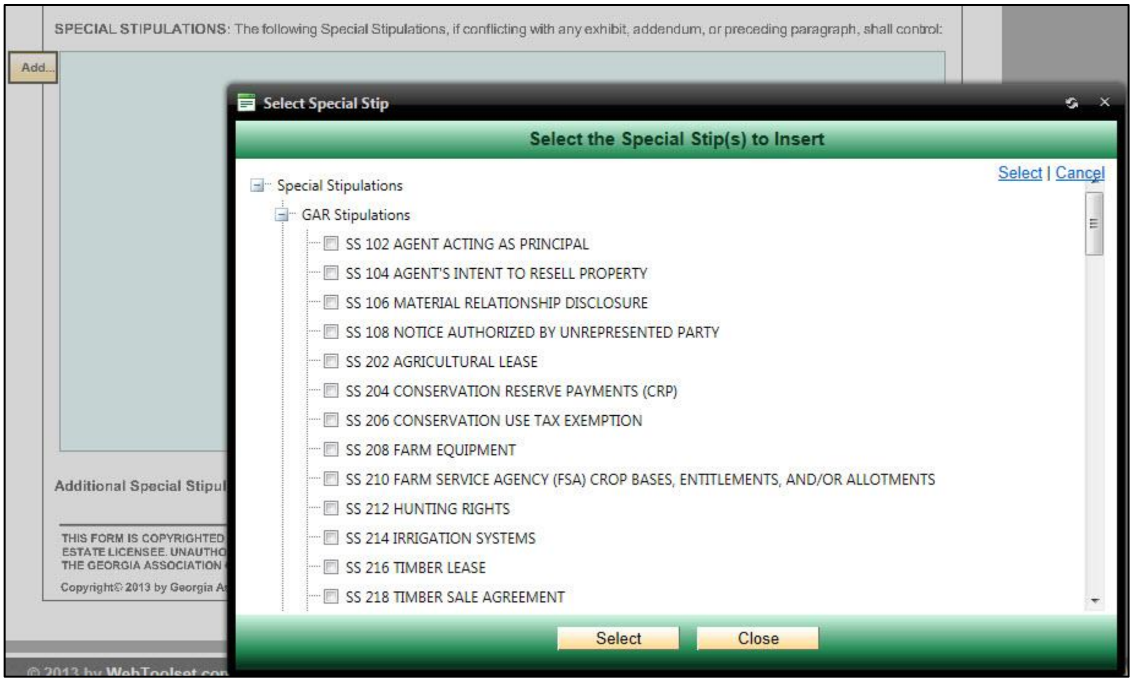
	Use the More Options button to: • Add Highlighting to fields so you can see them easily. • Toggle text color in fields from black to blue or blue to black for easy reading. • Add N/As to empty fields in the form. Best Practice: use this option after you have completed all the other fields. • Maximize the form view by collapsing the toolbar. 
	Use the Go To Page button drop down to quickly move to other pages within a document.
 	Use the Zoom In/Out buttons to make viewing the form on the screen easier.

3. In the shaded areas of the form, type appropriate information. Many fields prefill from the client record and the FMLS listing information (if you selected a listing.)
4. Use **tab** to move from field to field.
5. When you are done, click the **Save** icon on the toolbar.

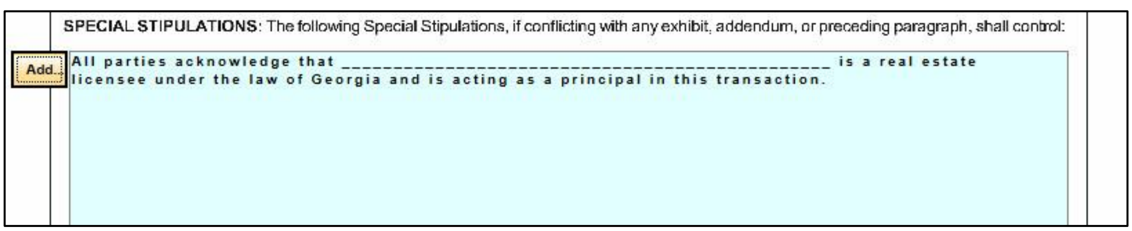
Adding Special Stipulations

Several forms have a section for adding Special Stipulations.

1. Use the **Add** button in the Special Stipulations section of a form to select from a list of prepared special stipulations.
2. Place check marks next to the stipulations you want to add to your document, then click on the **Select** button.



The stipulation inserts into the section.

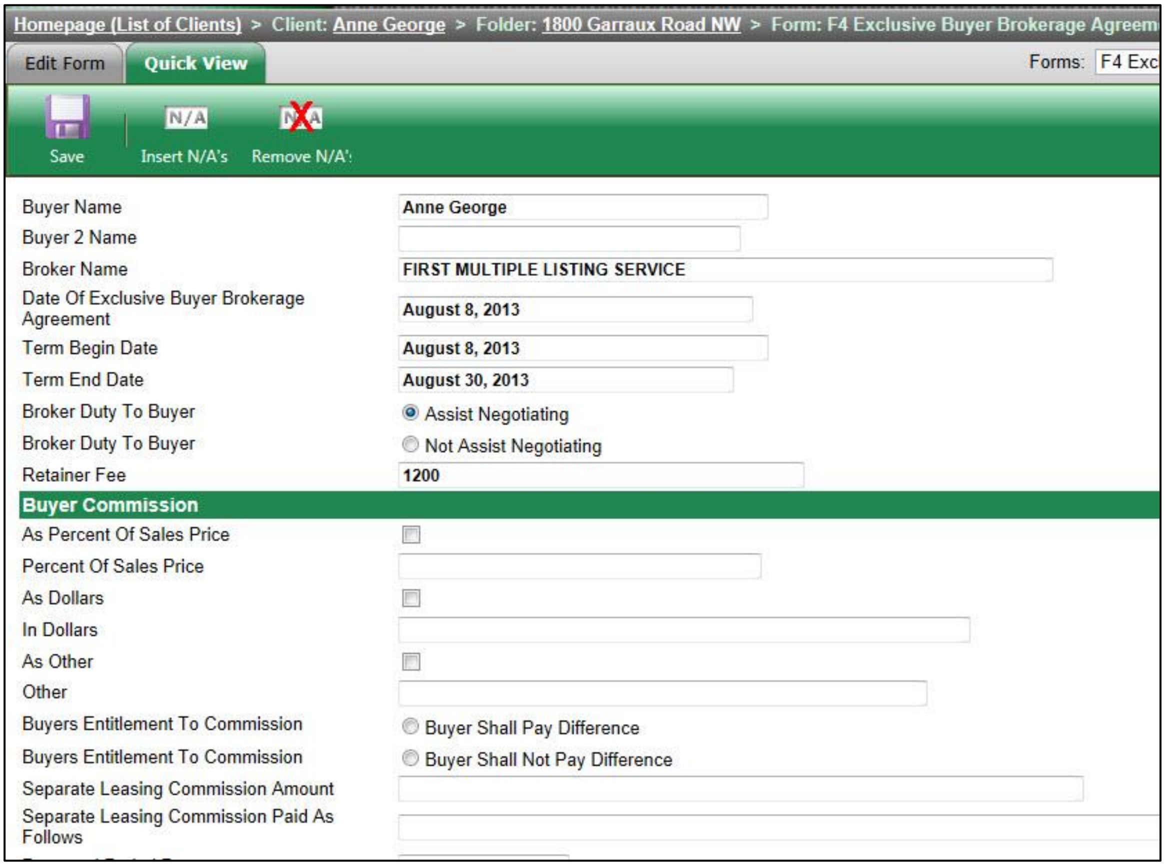


3. Click **Save** icon to save changes to the form.

Completing Forms with Quick View

A fast way to complete forms is using the **Quick View** tab. Instead of seeing a replica of the form and tabbing to fill in blanks, the Quick View tab presents fields on your screen for quick input of information on the form.

1. From the Edit Form screen, click the **Quick View** tab.

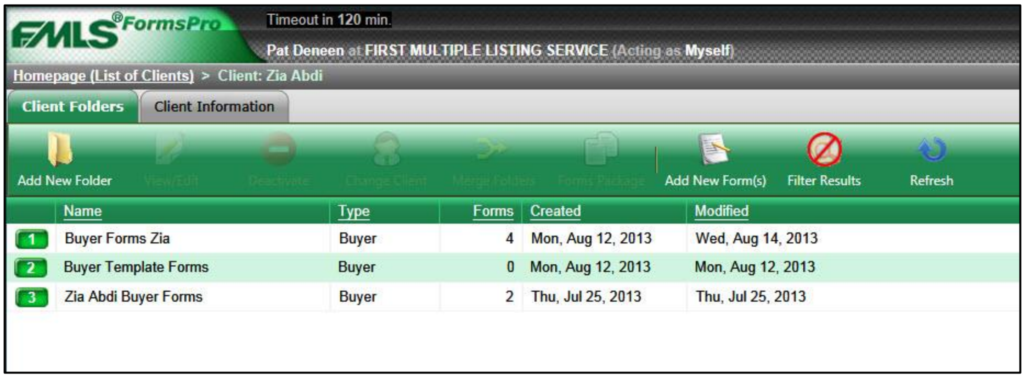


2. Complete the fields.
3. When you are done, click the **Save** icon.
4. To return to the form view, just click on the **Edit Form** tab.

Printing Forms

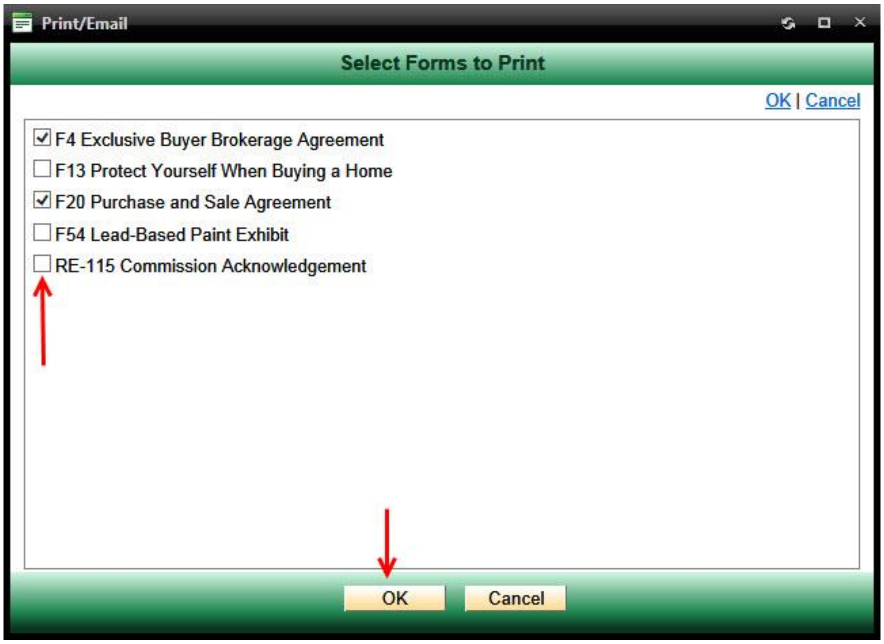
To print form(s):

1. Locate the client in the list of clients on the homepage.
2. Double click on the client's name. The list of folders for that client appears:

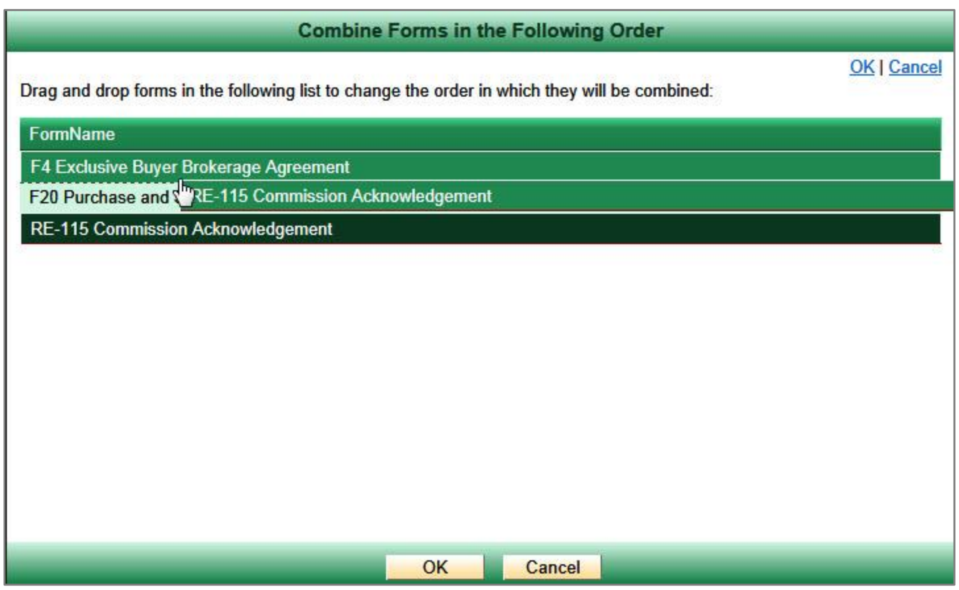


3. Double click to open the appropriate folder and display the forms inside.
4. Click to highlight any form and activate the icon bar.
5. Click on the **Print** icon.

6. The Select Forms to Print window opens. Place check marks in the boxes for the forms you would like to print.

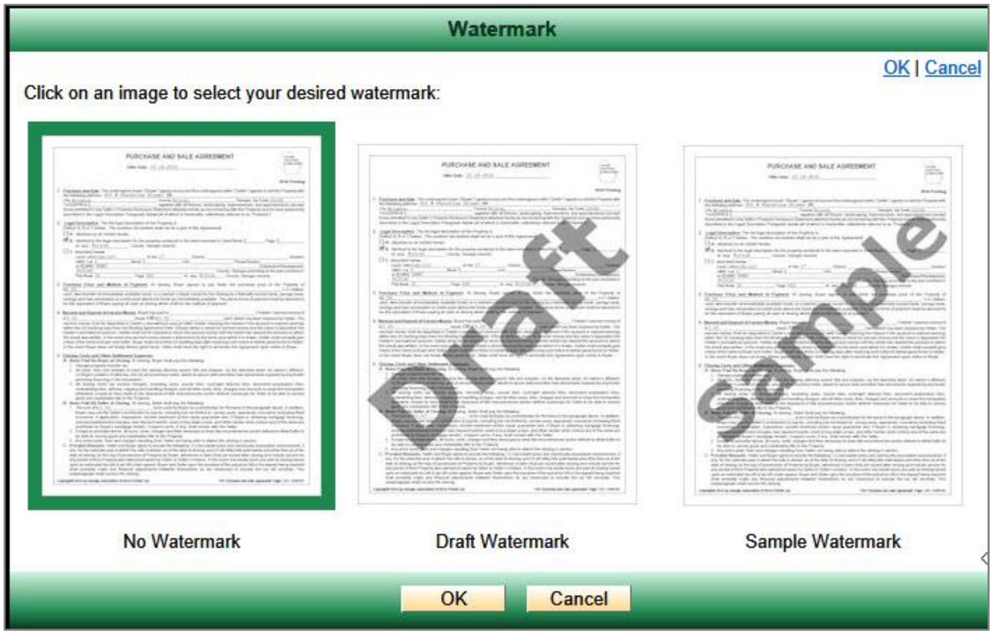


7. Click **OK**. The Combine Forms in the Following Order screen opens.



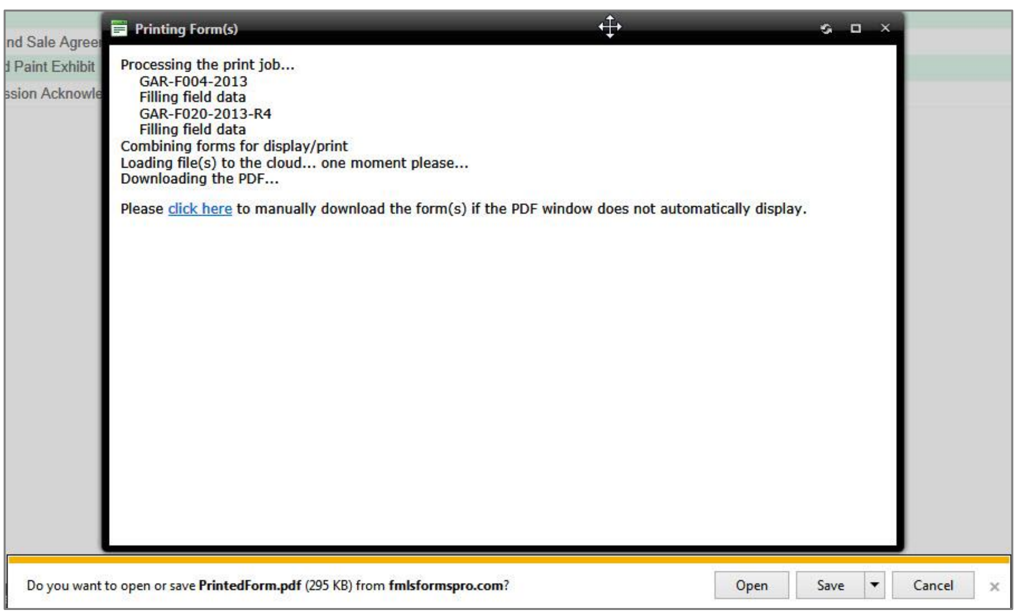
8. Drag and drop the forms in the list to the desired order.
9. Click **OK** to continue.

The Watermark screen appears.



10. Click on the appropriate image in the Watermark window to print the form(s) with or without watermarks.

11. Click **OK** to continue. FormsPro combines the forms you selected into a single pdf document.



12. Click **Open** or **Save** or **Cancel**.

13. When the combined pdf file appears, click on the **printer icon** on the top toolbar to print the form(s).

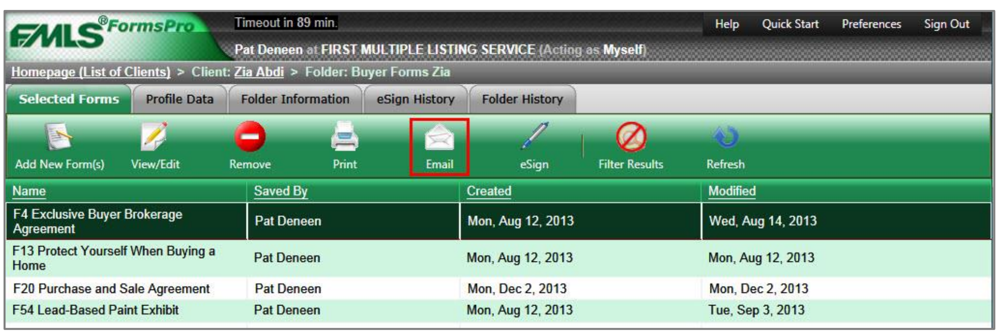
14. Make appropriate choices for number of copies, pages, etc., in the Print dialog window, then click on the **OK** button to print.

15. When printing is complete, close the window by clicking on the **X** in the upper right corner of the window.

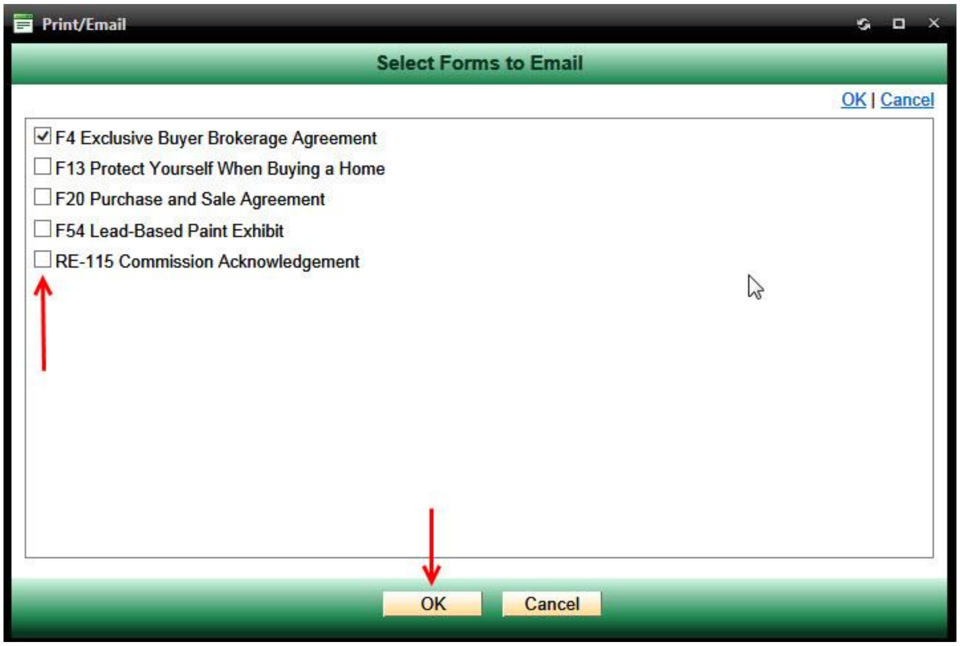
Emailing Forms

To email a form(s) to a client:

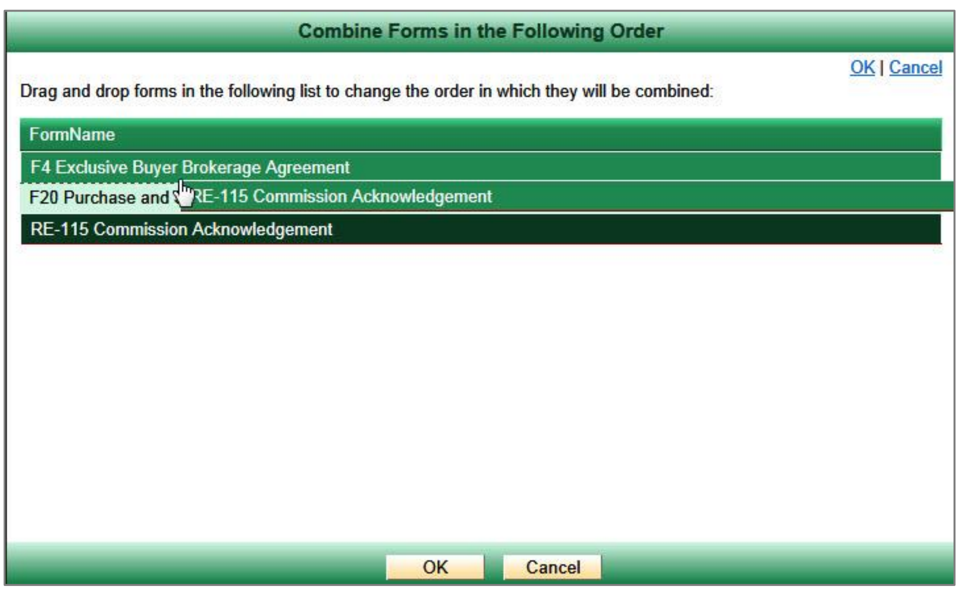
1. Locate the client in the list of clients.
2. Double click on the client's name.
3. Double click to open the appropriate folder and display the forms inside.
4. Click to highlight one form and activate the icon bar.
5. Click on the **Email** icon.



6. The Select Forms to Email window opens. Place check marks in the boxes for the forms you would like to print.

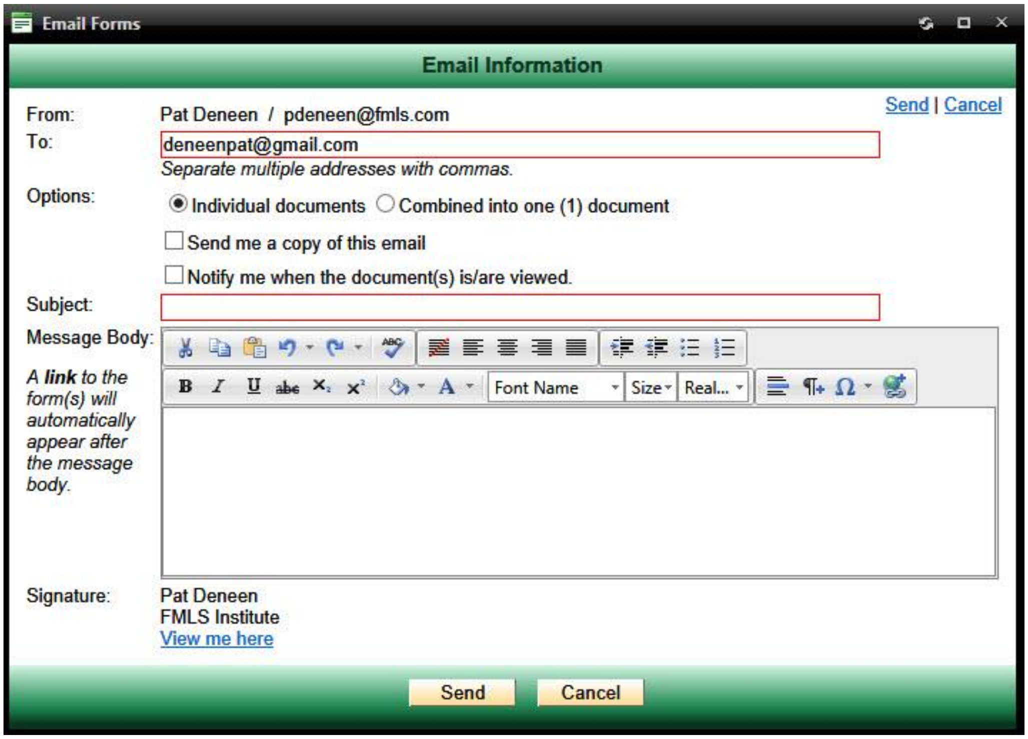


7. Click **OK**. The Combine Forms in the Following Order screen opens.



8. Drag and drop the forms in the list to the desired order.
9. Click **OK** to continue.
10. Click on the appropriate image in the Watermark window to email the form(s) with or without watermarks.

11. Click **OK** to continue. The Email Information window appears.



12. Choose the following options:

- Determine if you want to send individual documents as attachments or combine the documents into one attachment.
- If you want to receive a copy of the email, place a check in the Send me a copy of this email check box.
- If you want notification when the client views the documents, place a check in the Notify me when documents are viewed checkbox.

13. Type a subject in the Subject box, and a note to the client in the Message box. FormsPro sends a link to the form(s) in the body of the email message it sends. The link is good for 10 days.
14. You may add email addresses, if desired. Separate multiple addresses with commas.
15. Click **Send** to send the email.
16. You will receive confirmation that the email is being prepared and has been sent.

Creating/Using Forms Packages

The Forms Packages feature of FormsPro provides added flexibility for Agent, Brokers, and Office Staff, in that it allows the user to collect a set of forms (GAR, RE Forms, FMLS and/or Office) and save them together for fast and easy addition to clients' folders in FormsPro.

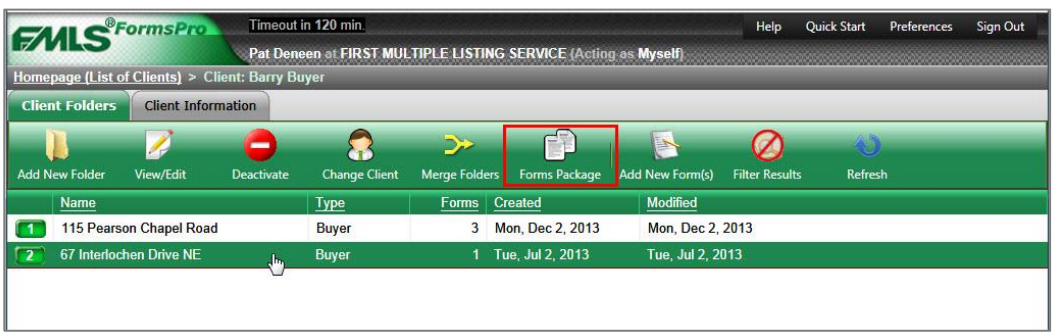
There are two ways to set up a forms package:

- An existing folder for a client that already contains the all forms you normally use can serve as the basis for the template.
- A bogus folder may be created and used for the creating the template, then deactivated once the template is saved.

Templates can be used repeatedly to quickly fill the folder of a new client with the contracts needed for closing.

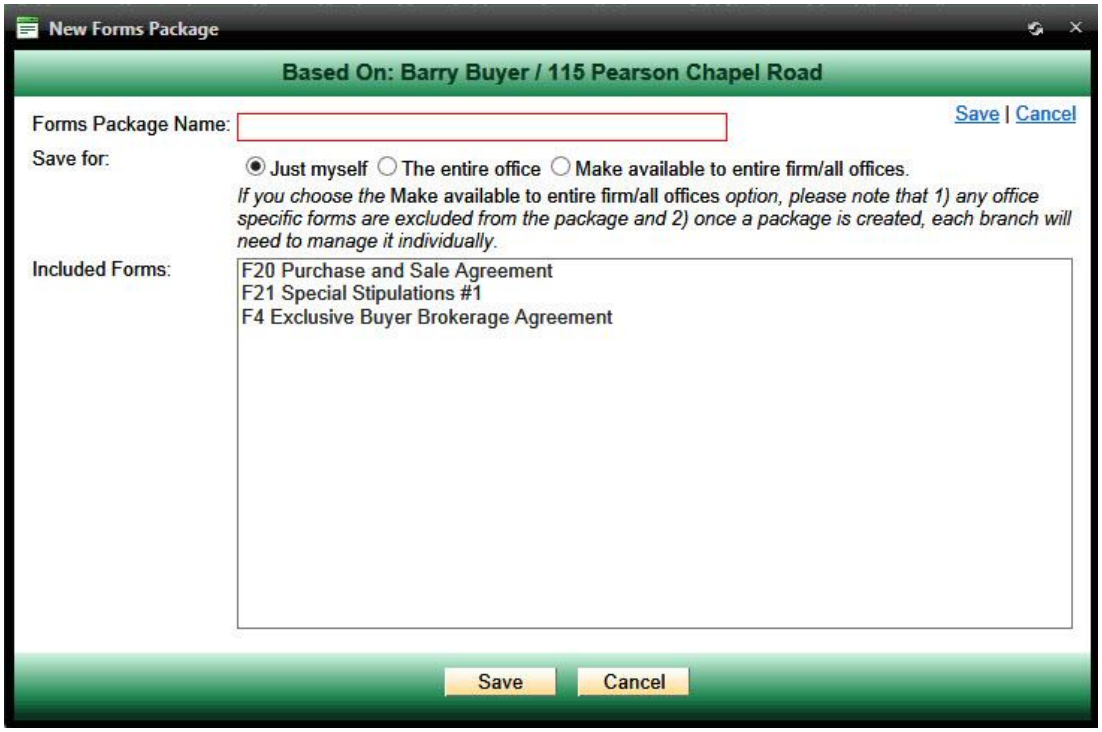
To create a Forms Package from an existing folder:

1. Locate the client whose folder contents reflect what you wish the package to contain.
2. Double click on the client's name to open the list of folders for that client.
3. Click once to highlight the appropriate folder and activate the icon bar.

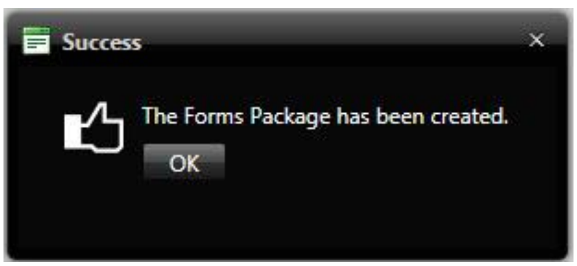


4. Click on the **Forms Package** icon on the menu bar.

The New Forms Package window opens.



5. Type a name for the Forms Package in the box provided.
6. Click **Save**. A confirmation appears.



7. Click on the **OK** button to continue.

To create a Forms Package from an existing folder:

If a folder does not exist which contains all the forms you want to use for a template, you can create a bogus client and a bogus folder for that client.

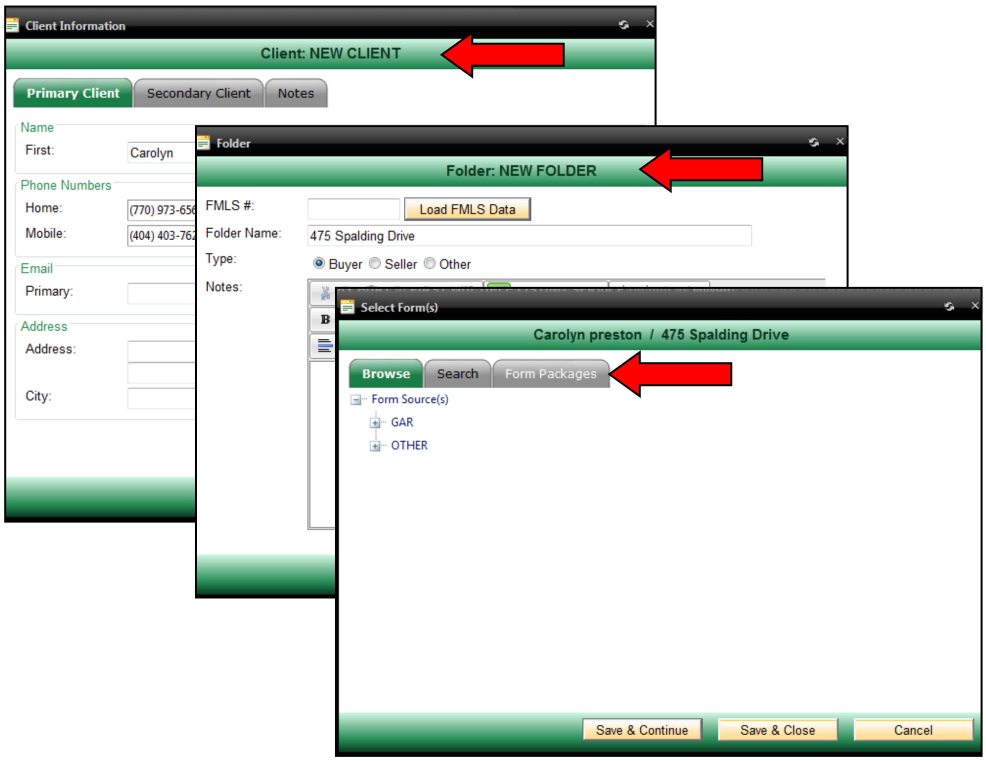
Add to that folder all the forms you want to use in your template. Then, follow the steps above to create the template. See page 24 of this guide for instructions on adding forms to a folder. Once you save the template, you can deactivate the bogus client and folder.

See pages 90-96 of this guide for instructions on deactivating folders and clients.

Using a Forms Package

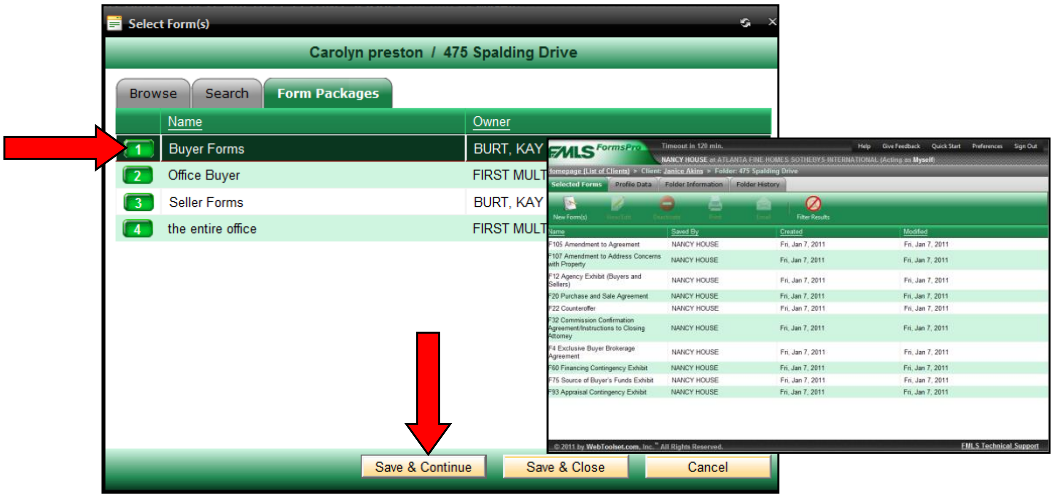
To use a Forms Package:

1. Add a **New Client** if necessary.
2. Create a **New Folder** for the client.
3. Name the folder and click **Save & Continue**.
4. In the Select Forms window, click on the **Forms Packages** tab.



5. Click once to highlight the Forms Package you want to use.

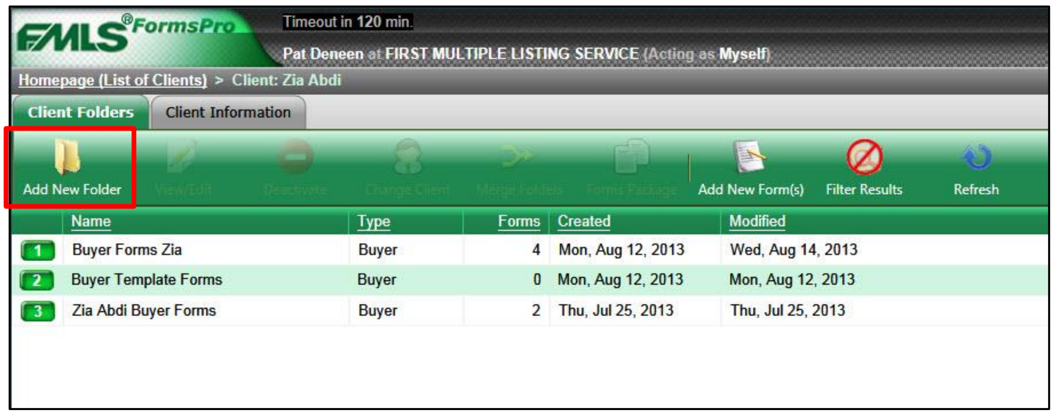
6. Click on **Save & Continue** to begin filling out the forms for the client or **Save & Close** to save the folder with the template forms in it. (You will be able to return later to fill out the forms.)



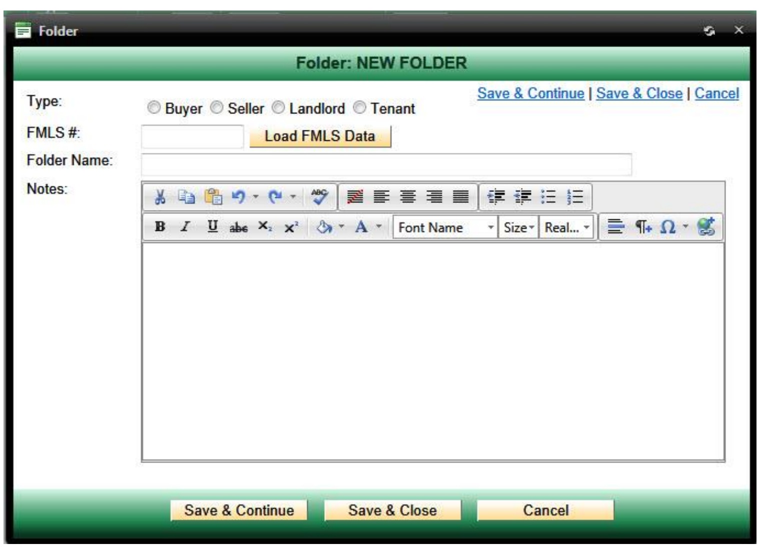
Adding a New Folder to an Existing Client

There may be times when you need to add a new folder for a client. For example, your buyer has looked at several properties and you would like to keep the documents on each property in a separate folder. You would want to add a new folder for the client when negotiations begin on another property.

1. Click on **Homepage** to view your list of clients.
2. Locate the client in the list and double click to open that client. The list of client folders appears:



3. Click on the **Add New Folder** icon. The New Folder window appears:



4. Complete the New Folder screen. Follow the steps on page 23 to complete this screen.
5. Click on **Save and Close.**

Using FMLS eSign

Getting signatures on a real estate contract can be a time-consuming task, especially when one contract can require the signatures of 6 or more individuals. Electronic signature software not only automates the process, it can also speed up the period for acquiring all signatures, and greatly reduce operational costs.

Electronic signatures have been used legally in Georgia real estate transactions since May of 2009 when House Bill 127 was signed into law. FMLS eSign was designed to follow the mandates of the law so that you can feel safe using it in your real estate transactions.

FMLS eSign is available free of charge to all FMLS members. eSign is interfaced into the FormsPro software so that agents can move from contract creation to contract signing with just a few clicks of the mouse!

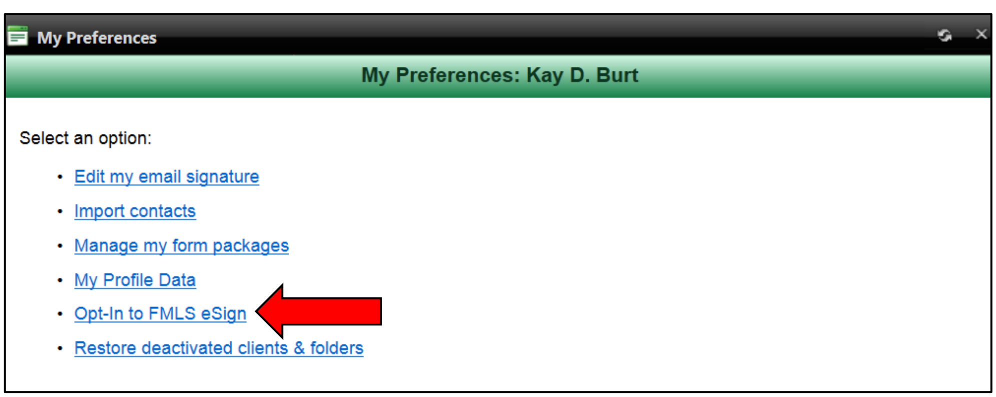
What is the difference between an electronic signature and a digital signature?

- **Electronic signature:** is a stylized script associated with a person. In commerce and the law, a signature on a document is an indication that the person adopts the intentions recorded in the document.
- **Digital signature:** is where you actually sign a screen or pad and the signature is converted into an image of your signature.

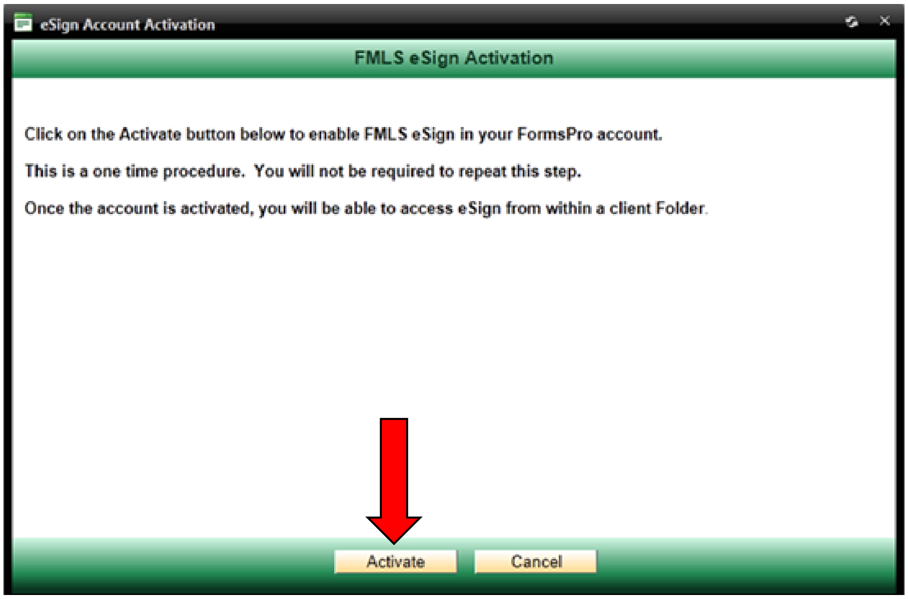
Opting in to FMLS eSign

Before you can begin to take advantage of the eSign software, you must opt in. Follow these easy steps:

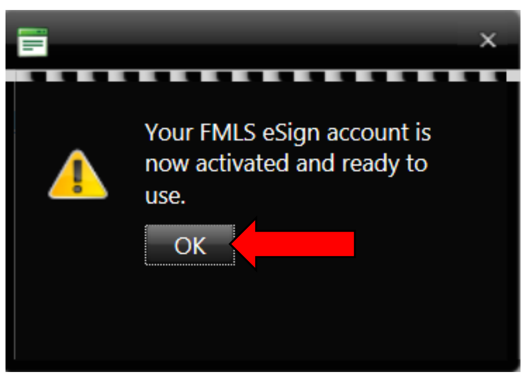
1. Open FormsPro.
2. Hover over **Preferences**.
3. Click on **My Preferences**.
4. Click on **Opt-In to FMLS eSign** on the My Preferences page.

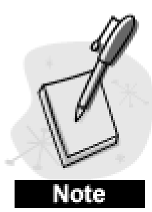


5. Click on the **Activate** button.



6. You will receive confirmation that your account has been activated. Click on the **OK** button to complete the Opt In process.

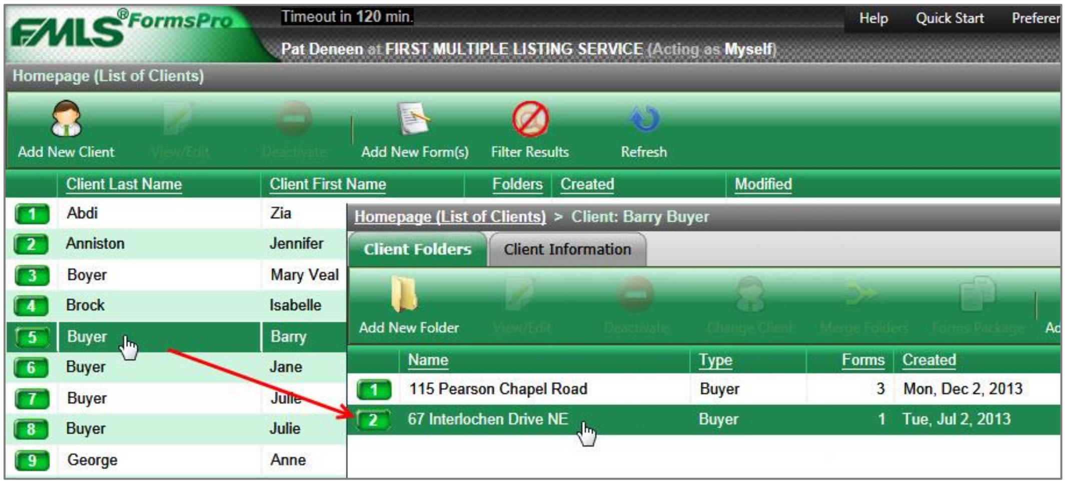




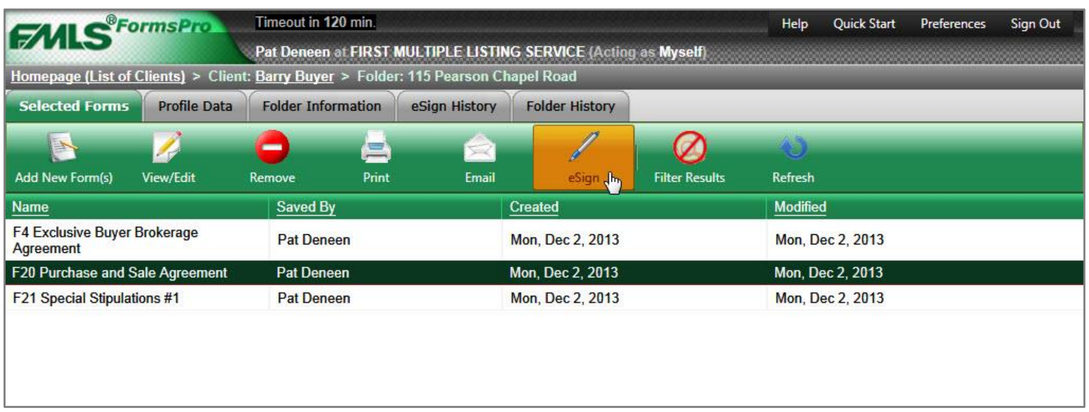
*The **Opt In** process is a one-time procedure. You will not be required to go through these steps again.*

Accessing FMLS eSign

1. Access FormsPro from the FMLS.com home page or from Fusion.
2. Double click on the client name to open the list of folders for the appropriate client.
3. Double click to open the transaction folder for that client.

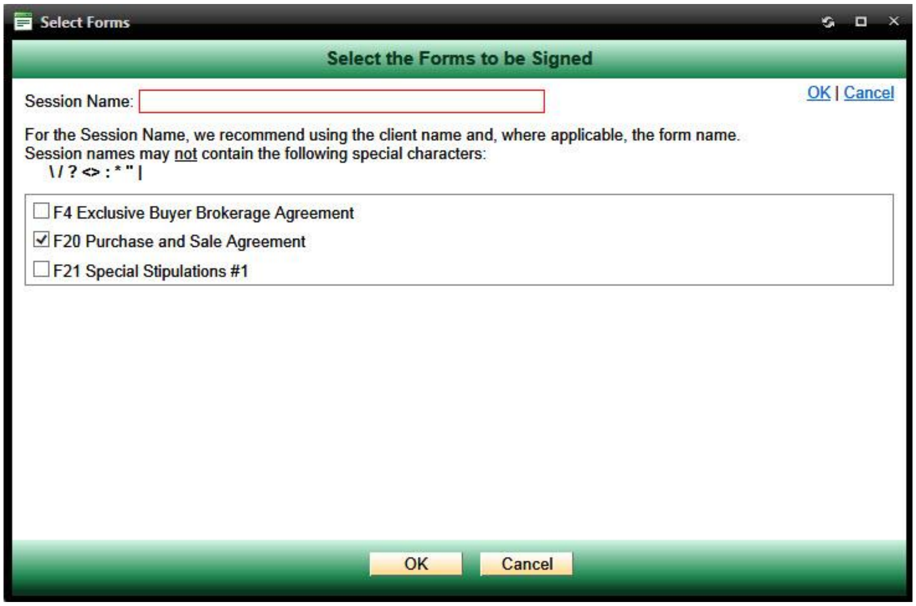


4. Click once to highlight the document to be signed. The toolbar activates.

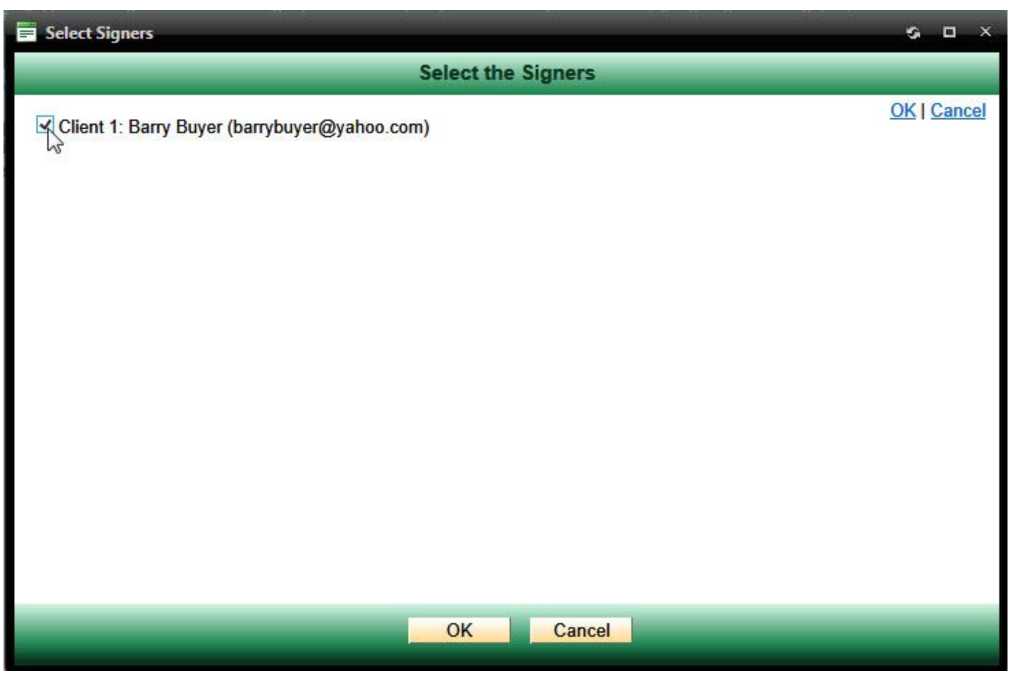


5. Click on the **eSign** button on the main menu.

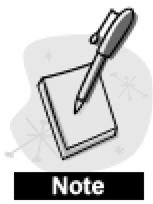
The Select Forms to be signed window appears:



6. Type a name for the Signing Session in the box provided. (You might want to use the name of the contract to be signed and the client name as the session name.)
7. Place a check mark in the box for each contract to be signed during the session.
8. Click **OK** to continue. The Select the Signer window opens.

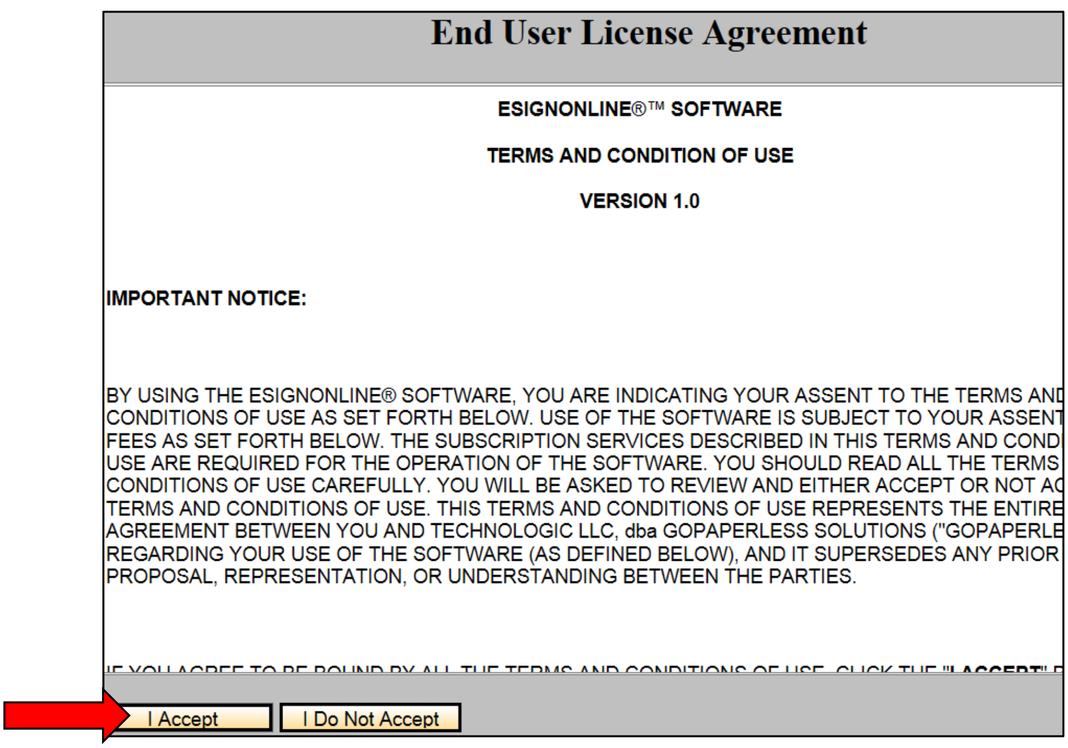


9. Place check marks in the boxes for those individuals whose signatures are required.
10. Click **OK** to continue. FormsPro gathers information from your account. ESign opens in a new window.



If you have pop up blocking software turned on, you may need to click on the ***Go to eSign*** *button.*

11. In your first eSign session you will be required to accept an End User License Agreement. Click on the **I Accept** button to continue.

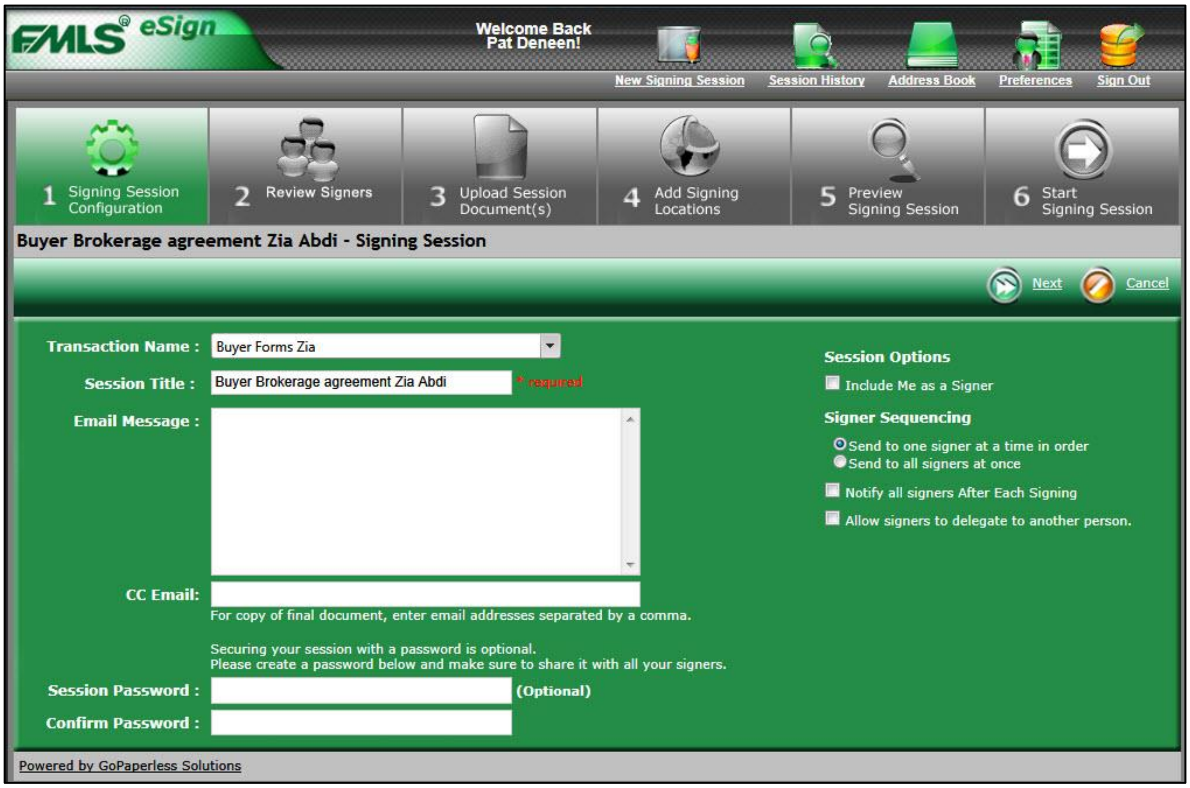


Using the eSign Wizard

E-sign has a quick, easy to follow six-step wizard that walks you through the process of setting up your session, indicating signers, uploading sessions documents, adding signing locations to documents and starting the session.

Step 1 - Signing Session Confirmation

In Step 1 of eSign, you configure the session.



Use the table below to complete the fields.

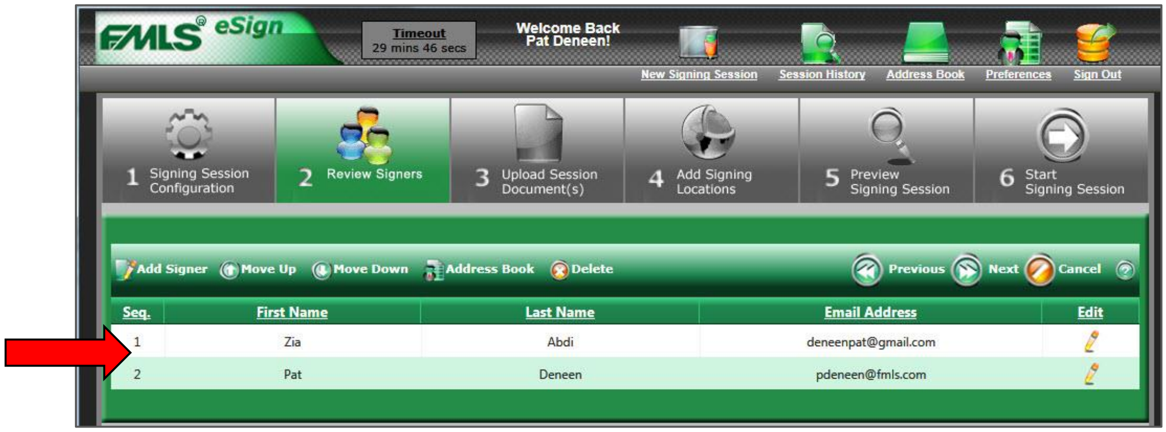
Field	Description
Transaction Name	Automatically populates from FormsPro; usually with the transaction folder name. You can change if needed.
Session Title	Automatically populates from FormsPro. You can change if needed.
Email Message	Leave blank to include only the default email message from eSign. You may edit and include instructions for your signers in addition to instructions provided by eSign. The default email from e-Sign contains a link that accesses the documents.

CC Email	Enter email addresses for individuals outside of the signing session who might need a final version of the signed documents, such as an attorney, lender, or broker. DO NOT put your email address or that of any of the signers, because you and the signers will automatically get a final, completed version.
Session Password	This optional field allows you to protect the signing session. Note that, if used, you must share this password with all signers either with a separate email or via phone or text message.
Confirm Password	Retype password to confirm the spelling of the password.
Include Me as a Signer	Check this box to include yourself as a signer. It is a best practice to do this.
Signer Sequencing	Determine whether the e-mail will go to one signer at a time for signature or if all signers will receive the document at the same time. If you select one signer at a time in order, other signers will not receive the email until the first person signs and so on.
Notify all signers After Each Signing	Send an email message notifying all signers.
Allow Signers to delegate to another person	Use this option only in those rare occasions where someone has a Power of Attorney and is allowing another person to sign in his or her place. For example, elderly person, and through Power of Attorney, the son/daughter signs things for the parent. NOTE: Talk to your Broker to determine if this option is viable in your situation.

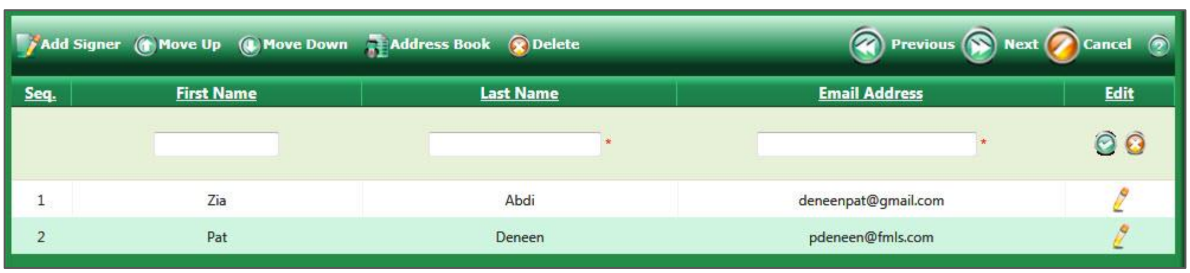
Click on the **Next** button to continue to Step 2.

Step 2 - Review Signers

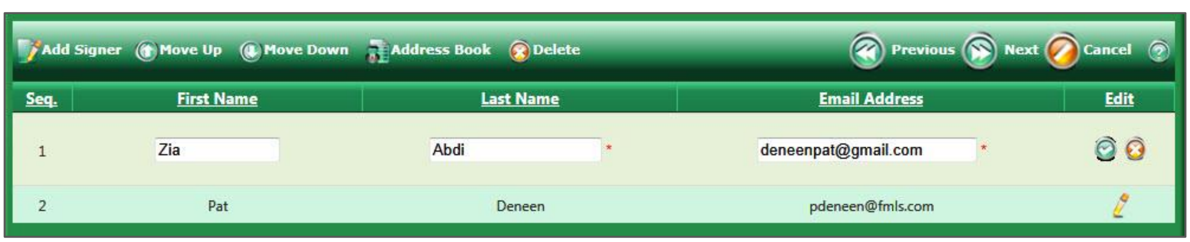
This step is where you specify the order of signers. eSign lists the signers in a suggested order, however, you can change the order.



1. Use the **Move Up** or **Move Down** buttons to determine the order for signing the document.
2. Add additional signers, if needed, by clicking on the **Add New** button or by selecting an individual from the **Address Book**.



3. Use the **Delete** button to remove a signer from the list.
4. To edit an incorrect name spelling or email address, click the **pencil icon** under the edit column.

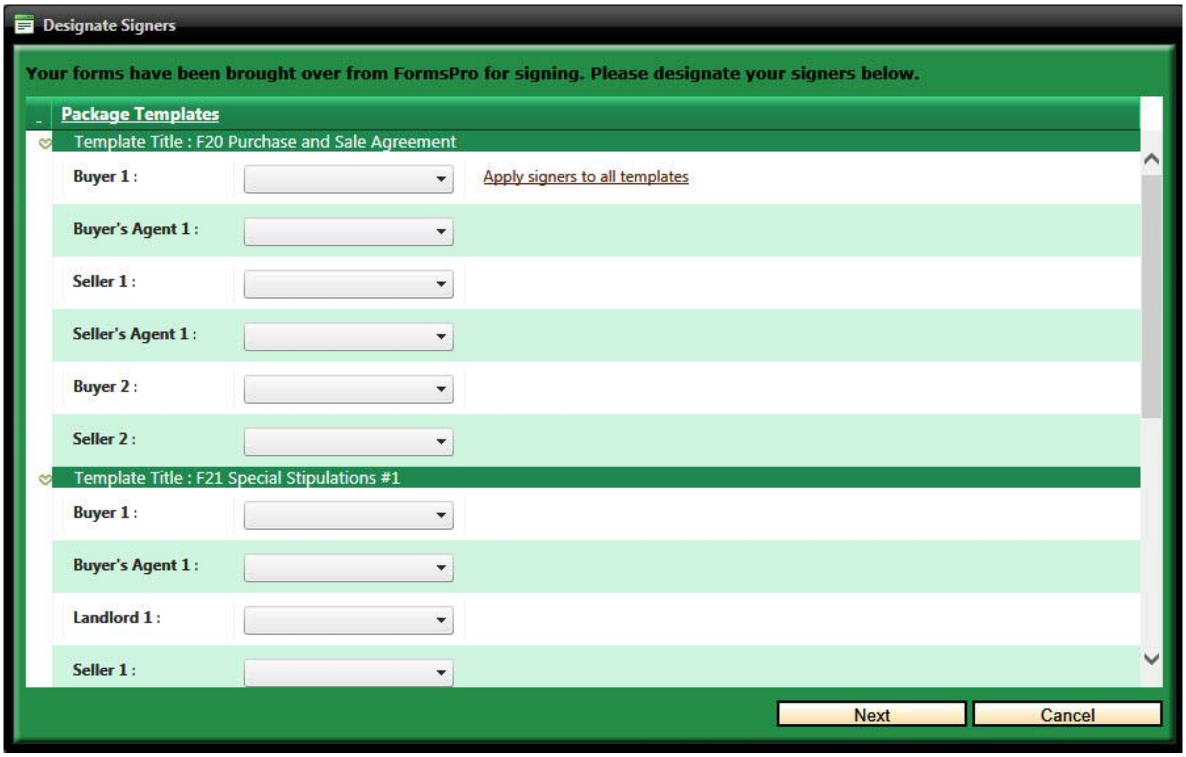


5. Make you edits and click the **green checkmark**.
6. Once your list contains everyone that needs to sign, click on the **Next** button to continue.

Step 3 - Upload Session Documents

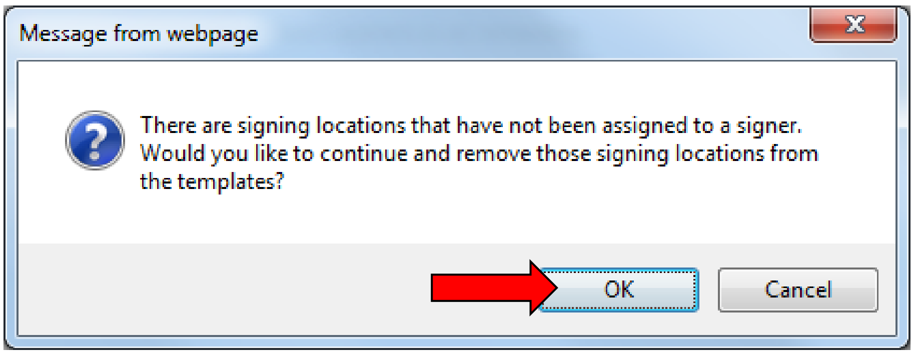
Step 3 has two parts. The first part of Step 3, you will need to configure the Signers for eSign so that appropriate names will appear in signing locations on each form. The second part of Step 3 is arranging the forms in the order you want them signed.

1. For the first document, click on the drop down arrow next to each role listed for that document.



2. Select the individual from the drop down list who is in that role.
3. Click **Apply signers to all templates** to fill out the signers for the other documents.
4. Click on the **Next** button to continue.

5. If you see the message box below, it is because a signing location exists on one or more of the forms that has not been configured with a name. This may happen if one individual is buying a property (rather than a couple). Since there are locations for two buyers, you must inform eSign that the 2nd signature is not needed for this session.



6. Click on the **OK** button to continue. The screen resets and a list of documents appears:

Seq.	Document Name	Template	Pages	Size (KB)	Signing Locations	View	Edit
1	F4 Exclusive Buyer Brokerage Agreement.pdf	F4 Exclusive Buyer Brokerage Agreement	6	103	1		
2	F20 Purchase and Sale Agreement.pdf	F20 Purchase and Sale Agreement	7	129	4		
3	Special Stipulations.pdf	F21 Special Stipulations #1	1	62	1		

7. If more than one document is included in the session, click to highlight the document you want to move and use the **Move Up** or **Move Down** buttons to place them in a specific order.

8. If you have a company specific form to be signed, use the **Upload Add'l Documents** button to locate it on your computer and add it to the list.

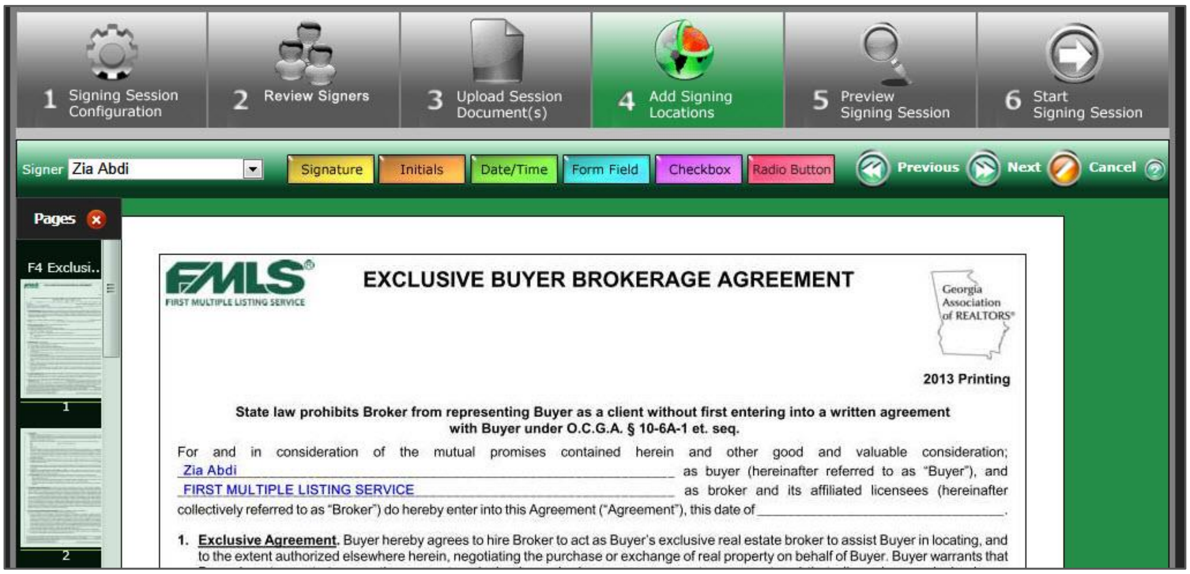
   NOTE: *If you are uploading a document for the first time, you will need to "map" the locations that require signatures. You do this in Step 4. If the company specific form will be used again, you may want to save the mapped template to eliminate having to map the document with each use.*

9. Click on the **Next** button to continue to Step 4.

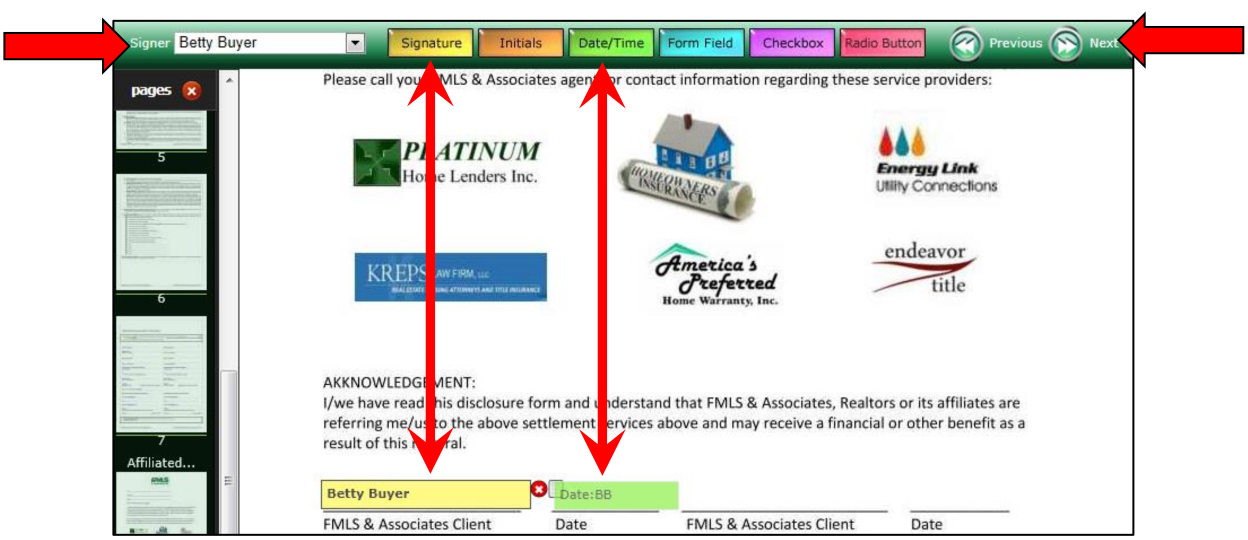
Step 4 - Add Signing Locations

FormsPro automatically adds the signing locations based on the template assigned in the previous step. There are cases where you will want map the additional signature locations within the document(s) to indicate to your signers where they need to sign or initial; check a box, place a date, etc. This is particularly useful of you have agency forms or additional documents that you need your client to acknowledge.

1. When you click on Next from the previous step, Step 4 opens with the first form to review for signature placement.



2. Click the + sign next to the word Pages on the left to open a pages view.
3. Scroll down the form until you get to the first place you want signed.



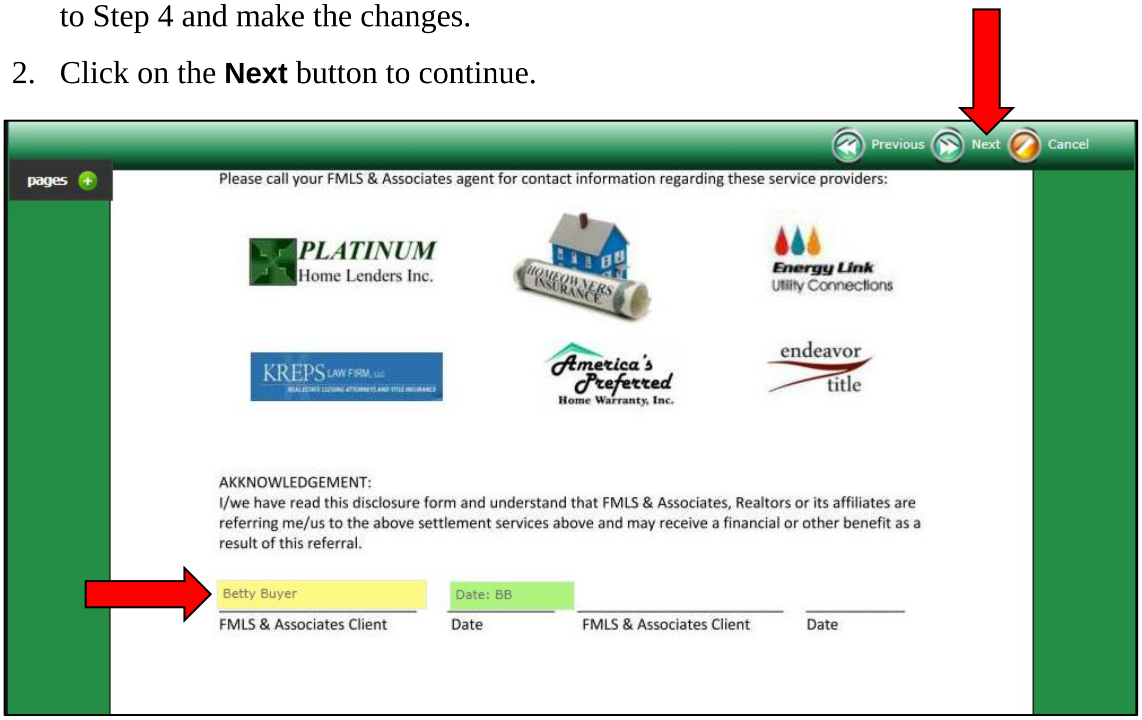
4. Click the drop down arrow in the Signer box to select the name of the signer. **This is an important step to ensure you have the right person signing in the right place.**

5. Drag and drop the yellow Signature square (or the Date/Time square, etc.) to the location where the signature should be.
6. Repeat steps above for additional signer locations. The forms will appear in the in the order you selected in Step3.
7. Click on the **Next** button to continue to Step 5.

Step 5 Preview Signing Session

In Step 5, you review the documents to verify that the signature blocks are in their proper locations.

1. Scroll through all the documents verifying that the signing locations are in the proper place. If you need to make adjustments, click the **Previous** button to return to Step 4 and make the changes.
2. Click on the **Next** button to continue.



Step 6 Start Signing Session

In this step, you can add to the system-generated email sent to your clients about the signing session. An example of the email is below:

Dear [Client Name]

[Agent Name] has sent you [Transaction Name] to sign.

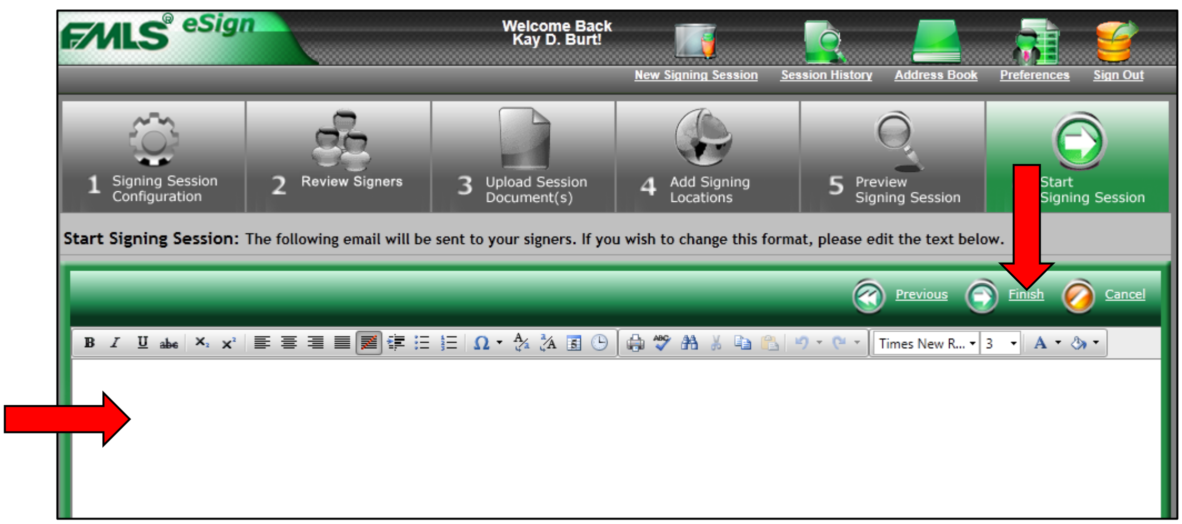
Click the link below to start the review and signature process. The signing session is not complete until you have reviewed the disclosure, adopted a signature, signed all documents, and confirmed your signature.

Click here to sign this document.

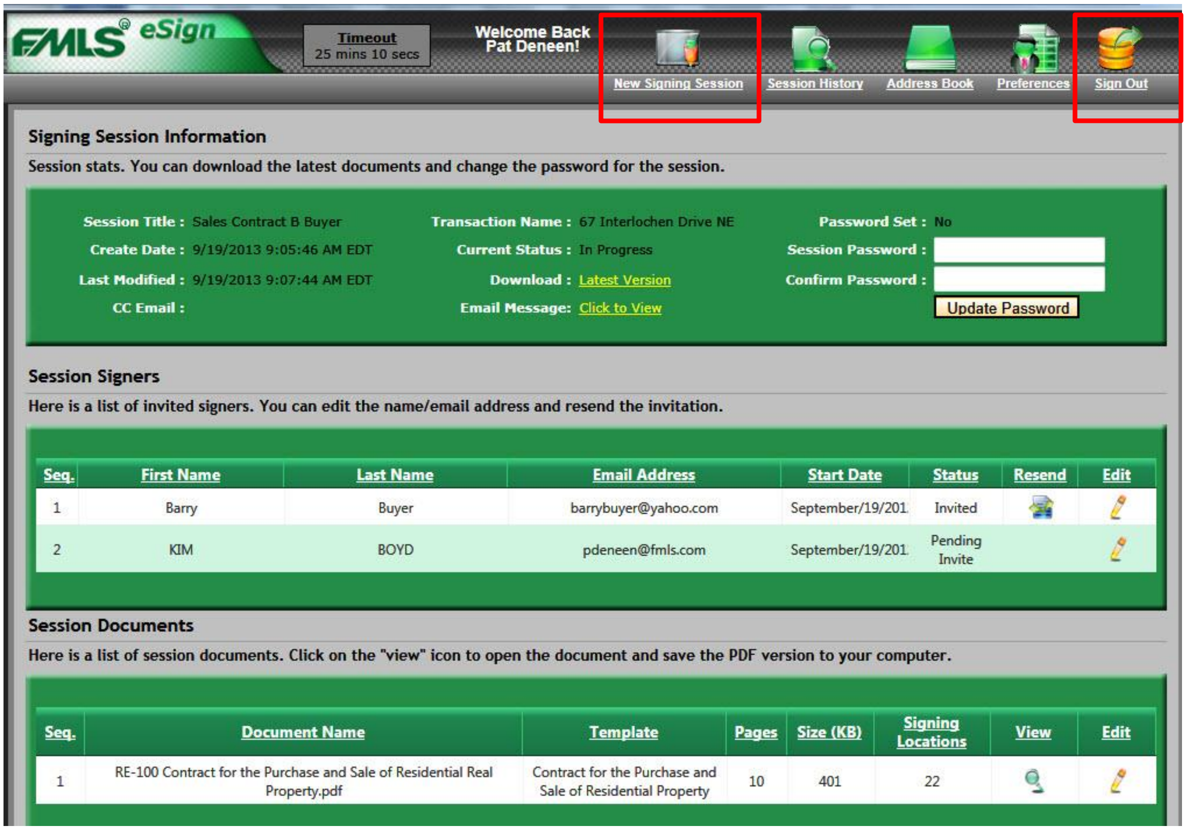
To contact the sender, please email [sender's email].

To receive technical assistance with the signing session, please contact your FMLS agent.

1. Make any desired changes or additions to the email message. The text you enter is inserted after the first line of the email and before the instructions.



2. Click on the **Finish** button to start the signing session. Emails are generated and sent to the signers. A Signing Session Stats screen displays showing you the session information.



3. When you are done, you can either create a new signing session by clicking **New Signing Session** icon OR sign out of eSign by clicking the **Sign Out** icon.

Completing the Signing Session

The signing session continues in each individual's email account. The email received by the signer(s) contains simple instructions and a link to begin the process.

FMLS eSign

Dear Barry Buyer,

Pat Deneen has sent document(s) for you to electronically sign.

e-Signing your documents is quick and easy! After your e-Signing session is complete, you and Pat Deneen will be provided with instant access to the e-Signed document(s). To begin your e-Signing Session, click the link below.

First you will verify the display of your name and then create your e-Signature. You can choose from pre-selected signature fonts (examples shown below) or draw your hand written signature.

John M. Hancock JMH
John M. Hancock JMH

Once you select a signature and agree to the consumer disclosure, the application will display your document(s). In the sections that require your e-Signature, you will see your name in colored boxes. Note the color will vary but you'll see your name and/or initials (examples shown below).

Landlord/Agent Signature John M. Hancock Date John M. Hancock

To agree and e-sign, just "click the box". The area will change to show your "e-Signature" and you can move on to the next area or document. Please note that your e-Signing session is not complete until you have:

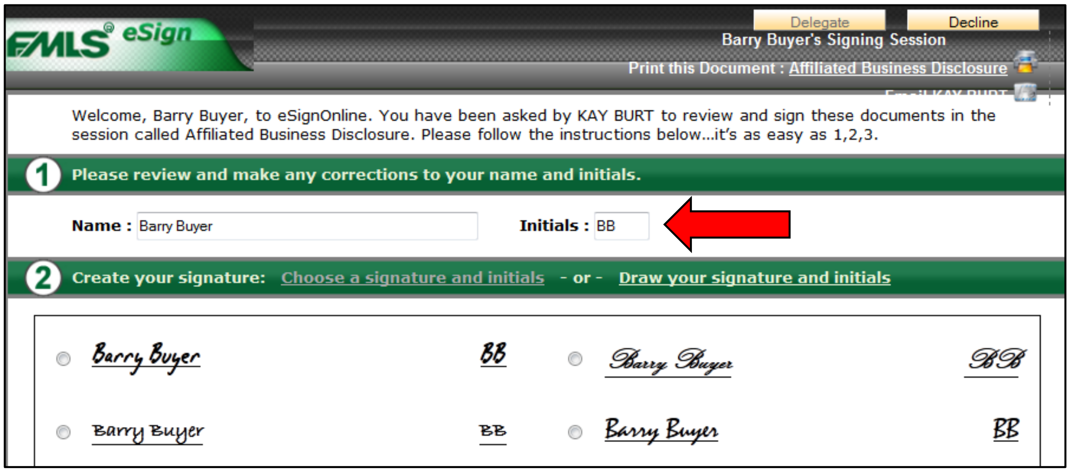
1. Created and selected your e-Signature.
2. Read and agreed to Consumer Disclosure.
3. e-Signed all of your documents.
4. Click DONE when complete.

Click here to sign this document.

The signing process consists of three steps:

Step 1

The signer reviews his signature and initials. If changes are needed the signer can make them during this step. For instance, the signer may wish to add an initial to his name.

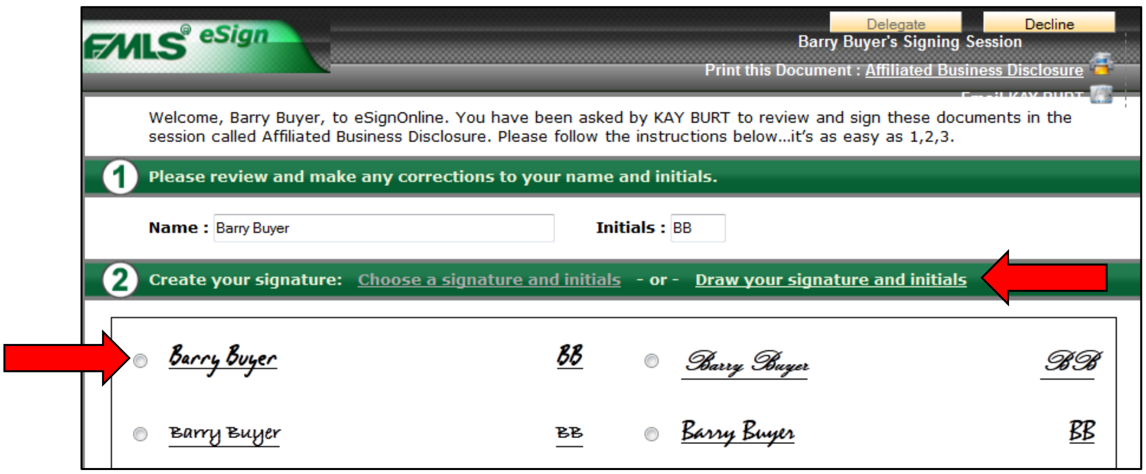


Step 2

The signer may choose as his legal signature one of six different signatures presented on the screen **OR** he may choose to "draw" his own signature. A simple click to place a dot next to the desired signature **OR** a click on the "Draw your signature and initials" link is required.

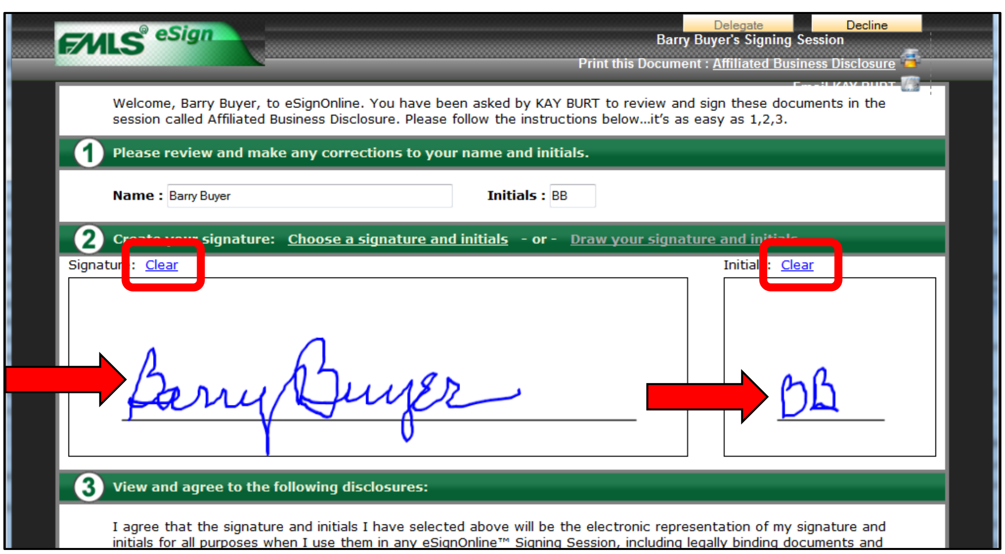
If one of the six signatures is chosen, the signer may proceed to Step 3.

If the signer chooses to "draw" his own signature, he will follow the instructions outlined below.



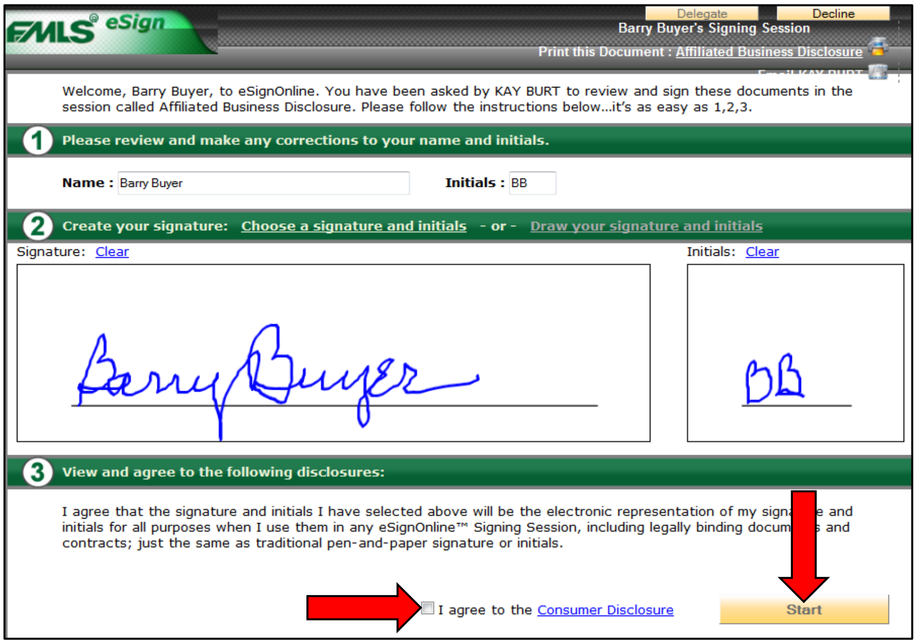
Drawing a Signature

Clicking on the **Draw your signature and initials** link changes the screen for the signer. Two boxes are presented in which the signer will use his mouse (or a stylus if he owns one) to "draw" his signature and initials in the boxes. A Clear button is available in case more than one effort is required.



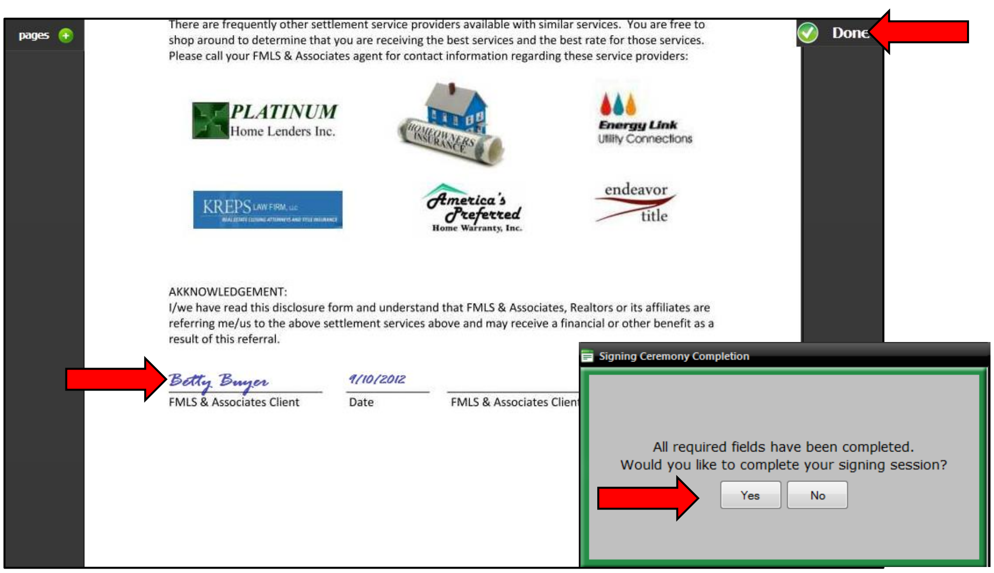
Step 3

The signer is required to read and agree to the Consumer Disclosure. The signer on the link to read the disclosure, and then places a check in the **I agree** box, and click on the **Start** button.

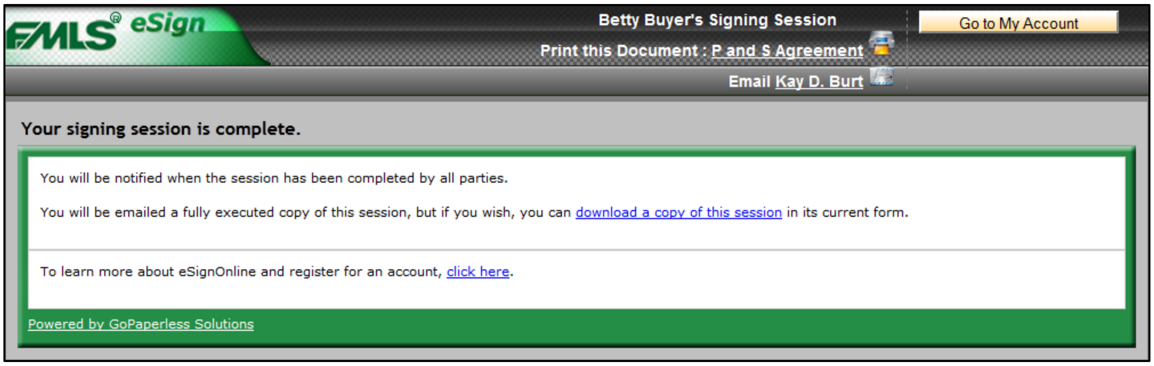


The document(s) display for signing. The signer simply clicks on his name on the form(s) to add his signature.

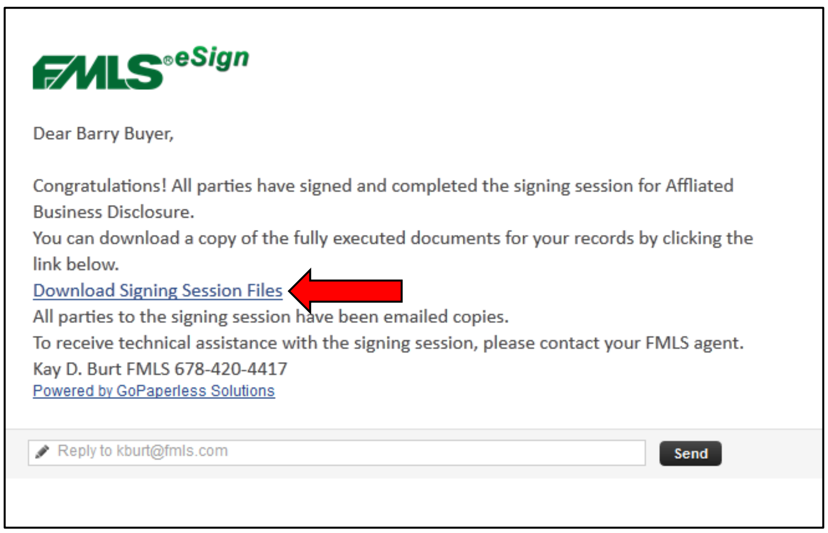
Clicking on the **Done** button provides confirmation that the signing was completed successfully. A final click on the **Yes** button and the signing session is complete.



The last screen informs the signer that he will be notified when all parties have signed the document(s) and that a fully executed copy will be emailed to him.



When the document has been signed by all signers, the fully executed document will be emailed to each Signer. The document will be accessed by a link in the email message.



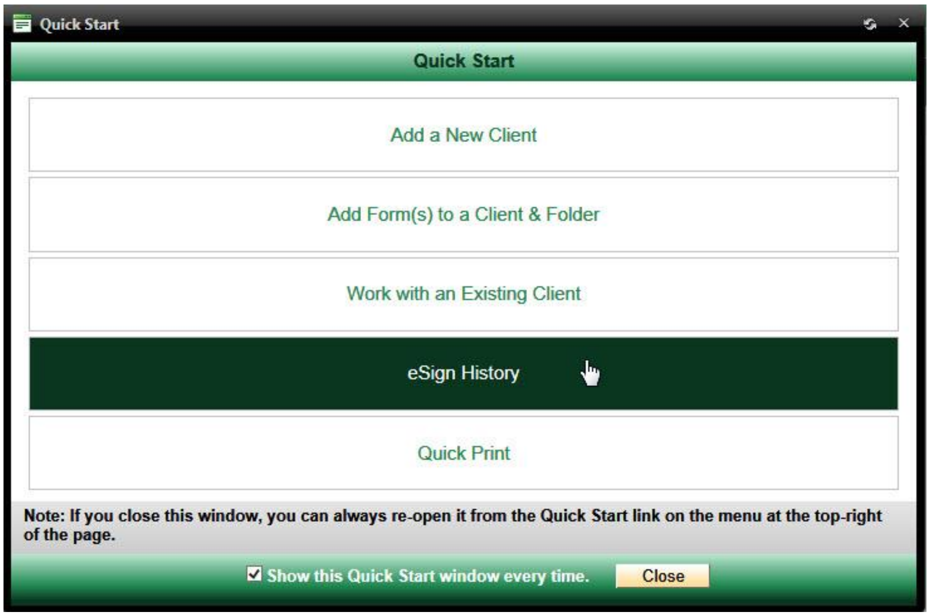
Click **the Download Signing Session Files** link to save the documents to the computer for uploading to DocuPro. The documents are saved as a zip file.

Agents involved on either side of the transaction may want to save the fully executed document on their computers to upload to DocuPro.

eSign History

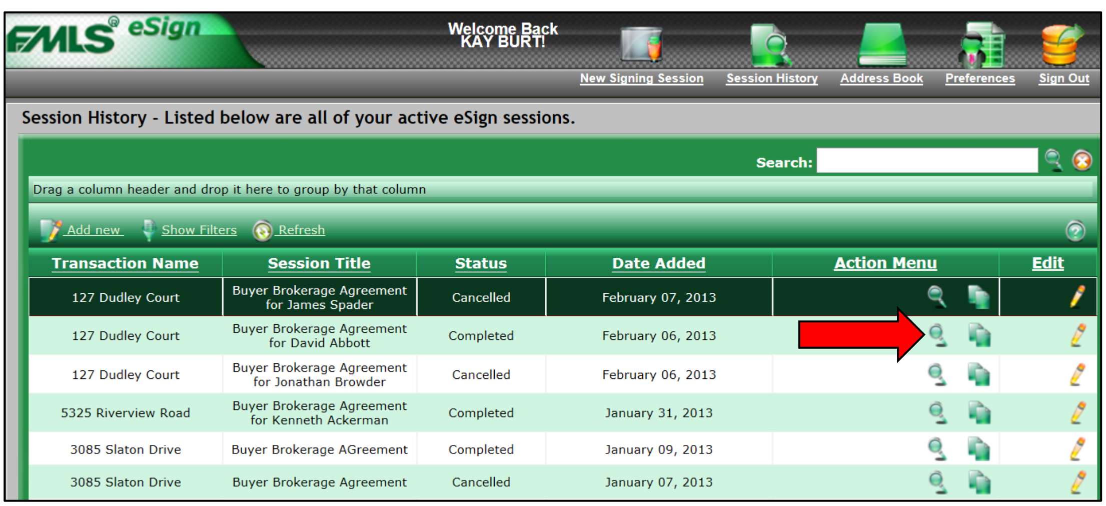
FMLS eSign keeps a log of the progress of each signing session. You may access the log at any time.

1. Log in to FormsPro.
2. Click the **eSign History** link on the Quick Start window.

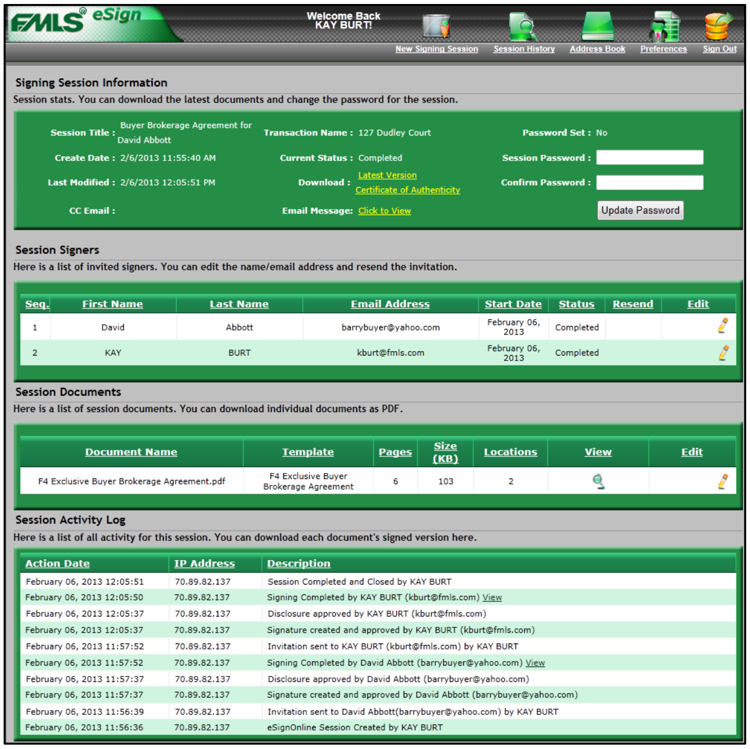


The Session History screen appears. This is a list of **all** your eSign sessions.

3. Click on the **Magnifying Glass icon** in the Action Menu column for the appropriate session.



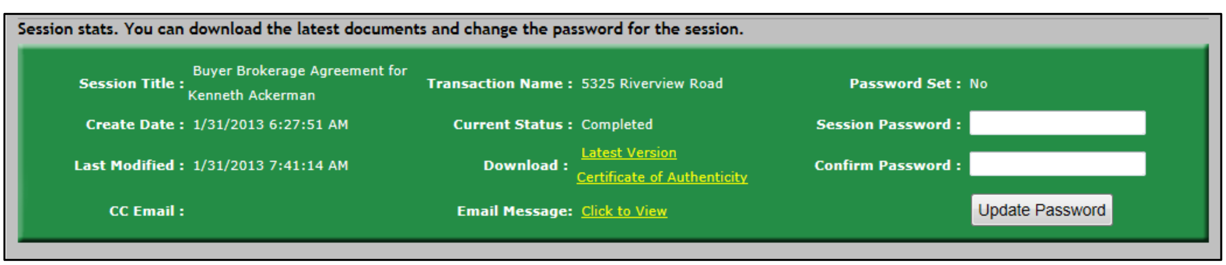
The Signing Session Information screen opens.



The Signing Session Information screen contains 4 sections: Session Stats, Session Signers, Session Documents, and Session Activity Log. A brief description of each section follows.

Session Stats

This section contains general information about the signing session. Links are available to download the latest version of the document and its certificate of authenticity. The session password may also be changed for the session, if applicable.



The table below defines the options in the current status field.

Status	Definition
Building	The session is in building (setup) state and has not been sent out for signing.
In Progress	The session setup has been completed and session has been sent out to clients for signing
Completed	The session has been signed by all signing parties and completed.
Cancelled	The session has been canceled by the account owner.

Session Signers

This section displays a list of invited signers for the session. The name or email address of a signer may be edited and the invitation to sign resent.

Session Signers

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

Seq.	First Name	Last Name	Email Address	Start Date	Status	Resend	Edit
1	Kenneth	Akerman	barrybuyer@yahoo.com	January 31, 2013	Completed		
2	KAY	BURT	kburt@fmls.com	January 31, 2013	Completed		

Session Documents

This section displays the documents included in the signing session. Information on the document(s) includes the number of pages in the document, its size, and the number of signature locations in the document.

Session Documents

Here is a list of session documents. You can download individual documents as PDF.

Document Name	Template	Pages	Size (KB)	Locations	View	Edit
F4 Exclusive Buyer Brokerage Agreement.pdf	F4 Exclusive Buyer Brokerage Agreement	6	103	2		

Session Activity Log

This section contains a list of all activity for the session. Each activity in the list will include the date and time the activity occurred, the IP address of the individual (which roughly identifies the location of the computer the signer used), and a description of the event.

Session Activity Log

Here is a list of all activity for this session. You can download each document's signed version here.

Action Date	IP Address	Description
January 31, 2013 07:41:14	70.89.82.137	Session Completed and Closed by KAY BURT
January 31, 2013 07:41:13	70.89.82.137	Signing Completed by KAY BURT (kburt@fmls.com) View
January 31, 2013 07:40:50	70.89.82.137	Signature created and approved by KAY BURT (kburt@fmls.com)
January 31, 2013 07:40:50	70.89.82.137	Disclosure approved by KAY BURT (kburt@fmls.com)
January 31, 2013 07:40:06	70.89.82.137	Invitation sent to KAY BURT (kburt@fmls.com) by KAY BURT
January 31, 2013 07:40:05	70.89.82.137	Signing Completed by Kenneth Akerman (barrybuyer@yahoo.com) View
January 31, 2013 07:39:49	70.89.82.137	Signature created and approved by Kenneth Akerman (barrybuyer@yahoo.com)
January 31, 2013 07:39:49	70.89.82.137	Disclosure approved by Kenneth Akerman (barrybuyer@yahoo.com)
January 31, 2013 06:29:19	70.89.82.137	Invitation sent to Kenneth Akerman(barrybuyer@yahoo.com) by KAY BURT
January 31, 2013 06:29:16	70.89.82.137	eSignOnline Session Created by KAY BURT

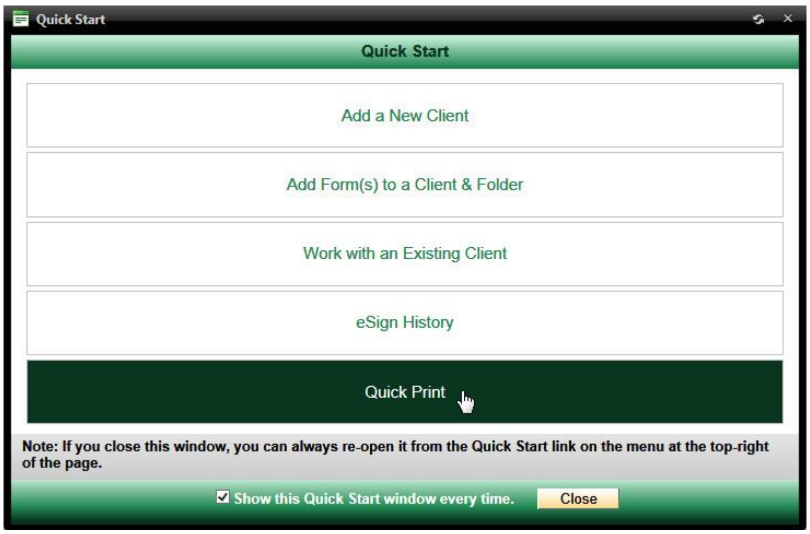
Additional FormsPro Features

FormsPro has many additional features to assist you in managing and working with your clients. For example, you can print blank forms to use on the go, you can deactivate / reactivate clients, folders, and forms, import contacts from Fusion, and view folder history.

QuickPrint

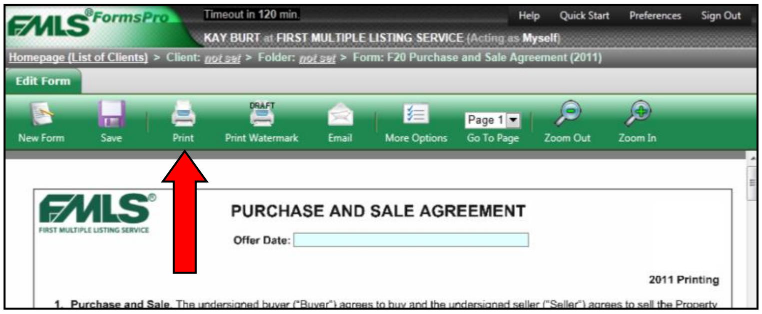
The Quick Print features lets you quickly print a blank form or fill out a form and print.

1. Click on **Quick Print** on the Quick Start menu – OR – click on **Quick Print** from the Quick Start menu.



2. Click on a **plus** (+) sign to expand a folder and sub-folders and view its contents.
3. Click on the form you want to print, then on **Continue**. The form opens.

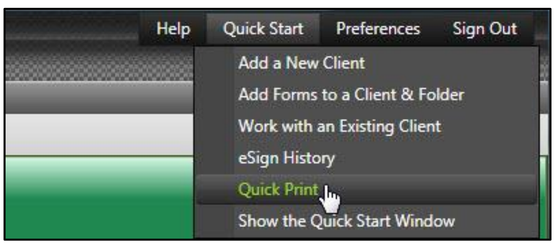
4. Click on the **Print** icon to print the blank form.



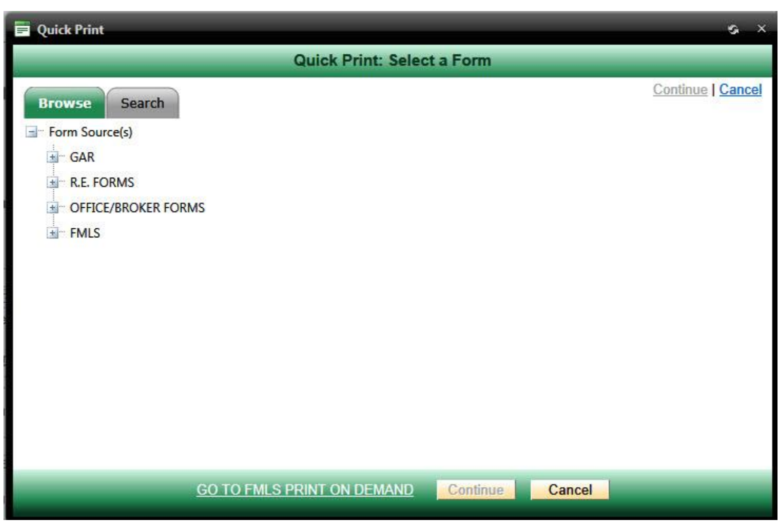
Completing a Quick Print Form

If you need to complete a form quickly, you can access the form, complete the information, and print. You can save this form for an existing client or set up a new client and save it in a new folder.

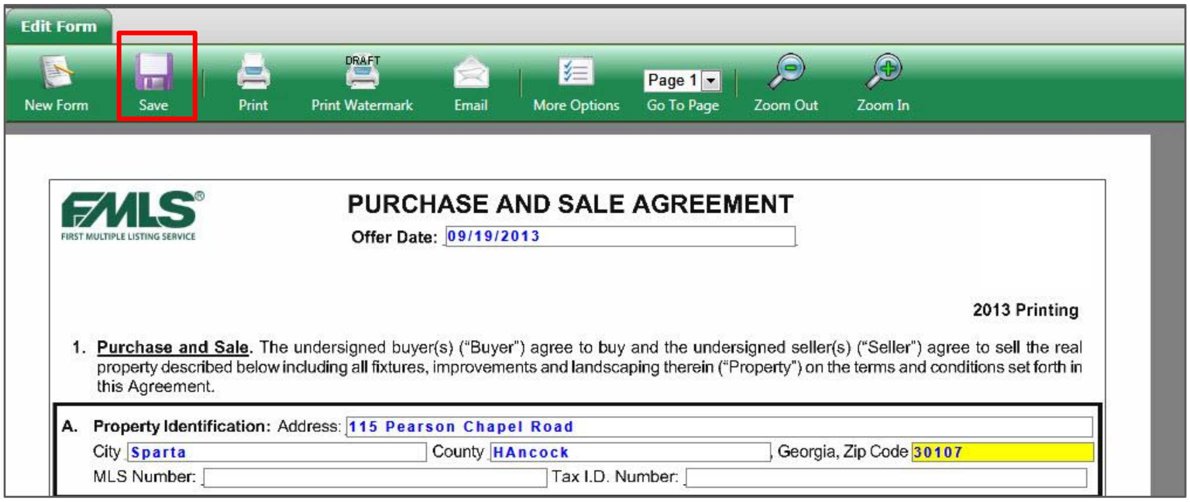
1. From the FormsPro main screen, click on the **Quick Start** link. The drop down menu appears.



2. Click on **Quick Print**. The Quick Print window appears.



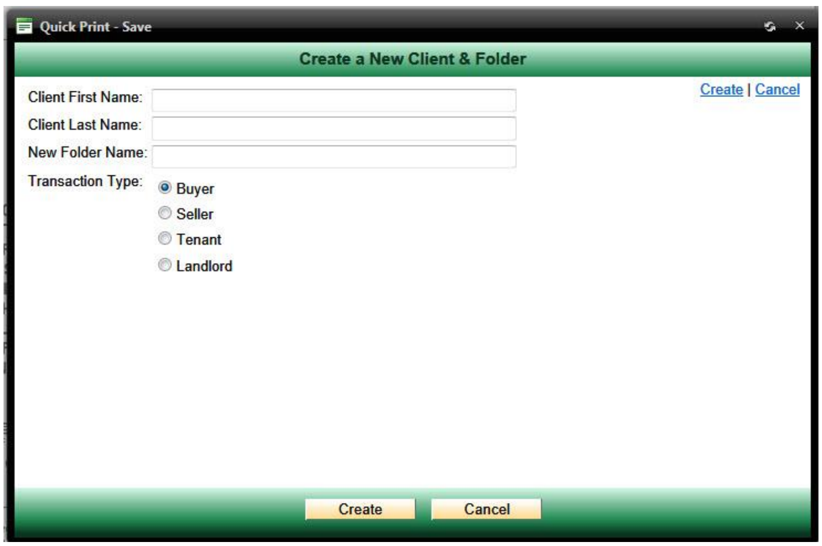
3. Navigate to and click to select the form.
4. Click on **Continue**. The form opens.



5. Complete the form. Use the Tab key to move from field to field.
6. Click on the **Save** button. The Quick Print-Save window appears:

1. Do *one* of the following:
   - If you choose to save the form to an existing client, click on the client's name and either choose an existing folder in which to place the form,
   - Or click on **New Folder** to save it in a new folder. Then continue to follow directions on the screen to save the forms.

- If you choose to save the form for a new client, click on the **New Client** button. The create New Client & Folder window appears:



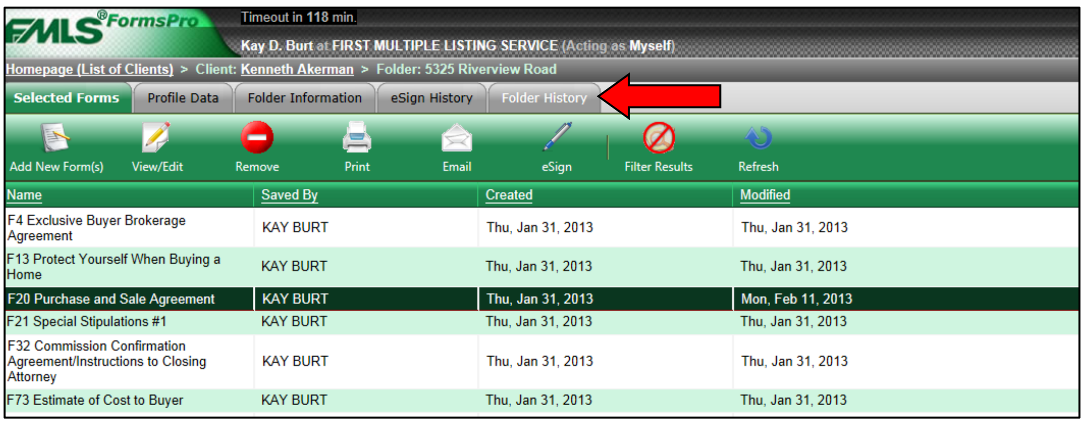
7. Complete the screen and click **Create**. The client and folder are created and are viewable in the Forms Pro Client list.

Folder History

During the course of negotiations, Real Estate contracts are often changed. FormsPro provides the ability to restore a previous version of a contract if the need arises. If changes made to a contract today are not acceptable to your client, you can restore to yesterday's version.

To restore a previous version of a contract:

1. Open the folder for the appropriate client.
2. Double click to open the folder that contains the document.
3. Click once to highlight any form in the folder.
4. Click on the **Folder History** tab. A list of history records displays.



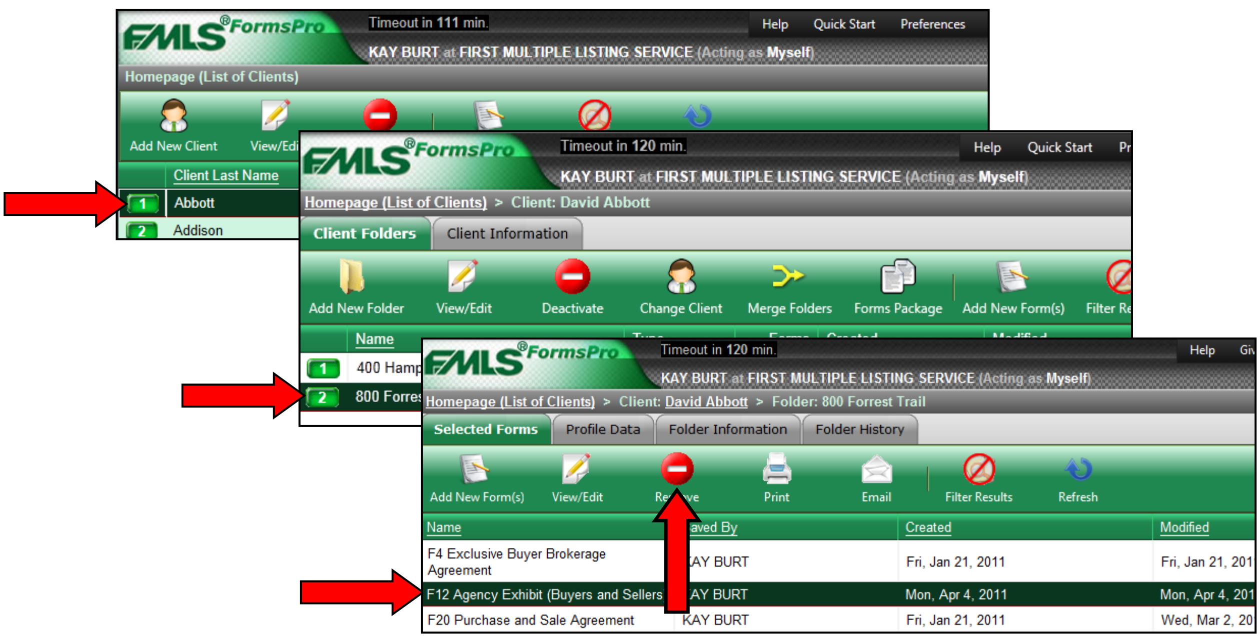
5. Locate the appropriate contract in the list and click once to highlight it. (Carefully choose the correct version. The Created column will provide date and time information to aid in your choice.)
6. Click on the **Restore** button.

Deactivating Clients, Folders and Forms

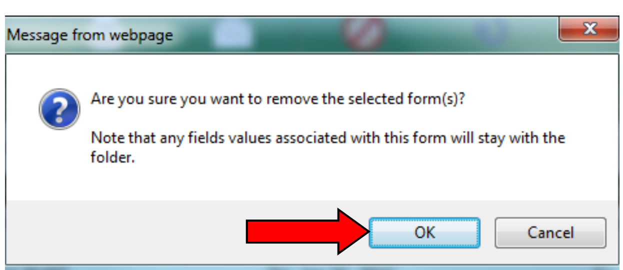
FormsPro provides a deactivation tool you can use to delete forms, and remove clients or folders. You may want to deactivate folders because negotiations fell through for a particular transaction, or when a client's transaction is closed so that you will have a shorter list of active clients to work with. It is important to note that when FormsPro deactivates clients or folders, it does not delete them. You may restore deactivated clients or folders at any time. This gives you flexibility and saves you time when a client returns to you for real estate needs! It is important to note that once you remove forms from a folder, they cannot be restored.

Removing Forms

1. Double click on the client's name from the List of Clients.
2. Double click on the folder that contains the form you want to delete.
3. Click once to highlight the form.
4. Click on the **Remove** button.

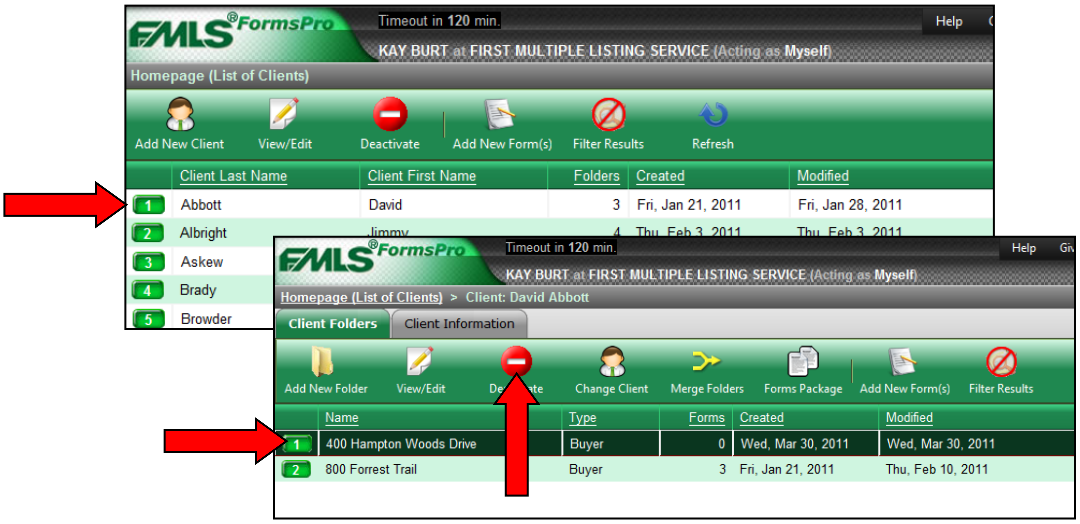


5. Click **OK** to confirm the deactivation. The form is removed.

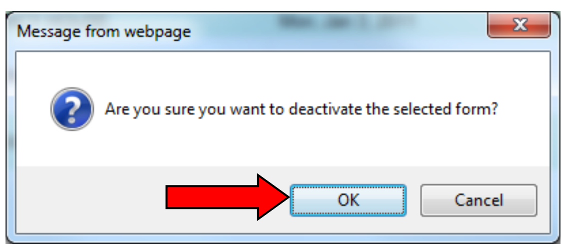


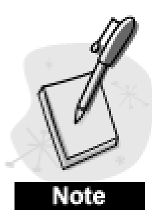
Deactivating Folders

1. Double click on the client's name from the List of Clients.
2. Click once on the folder you want to deactivate.
3. Click on the **Deactivate** button.



4. Click **OK** to confirm the deactivation. The folder is deactivated and removed from the client.

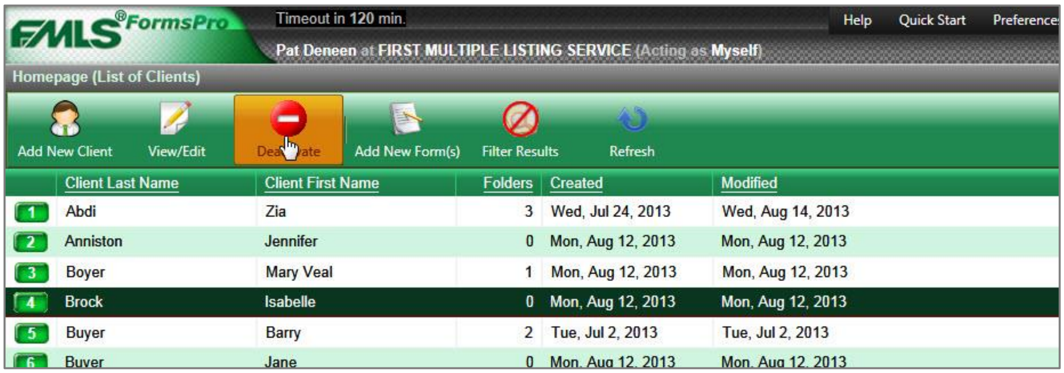




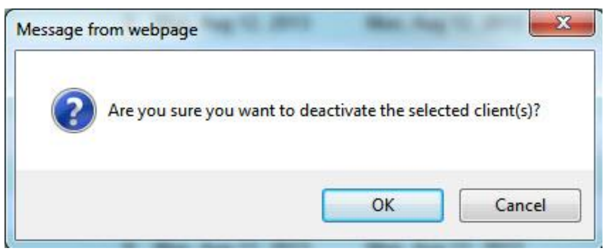
If the folder you deactivate contains forms, they will be deactivated along with the folder. FormsPro will not prompt you regarding this. Please take care to choose the correct folder for deactivation.

Deactivating Clients

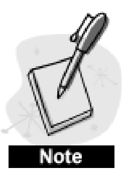
1. From the List of Clients, click once on the client to be deactivated.



2. Click on the **Deactivate** button. A conformation box appears asking you to confirm the deactivation.



3. Click **OK** to confirm the deactivation. The client is deactivated and removed from the list.



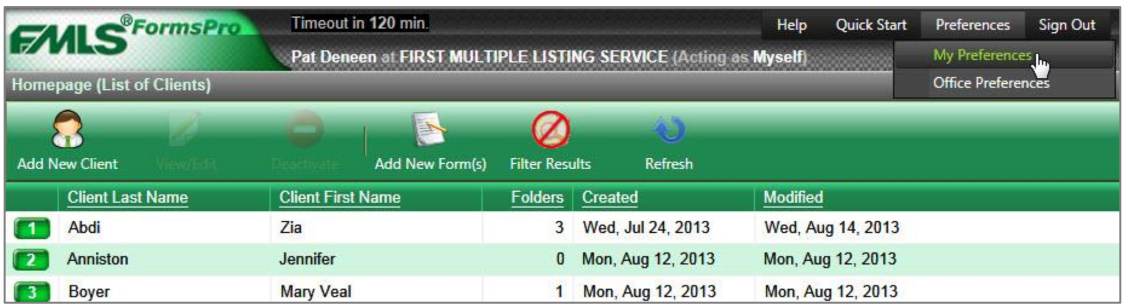
When you deactivate a client from FormsPro is only removes the client from the FormsPro application, it does not remove the client from your list of Fusion contacts.

Restoring Clients and Folders

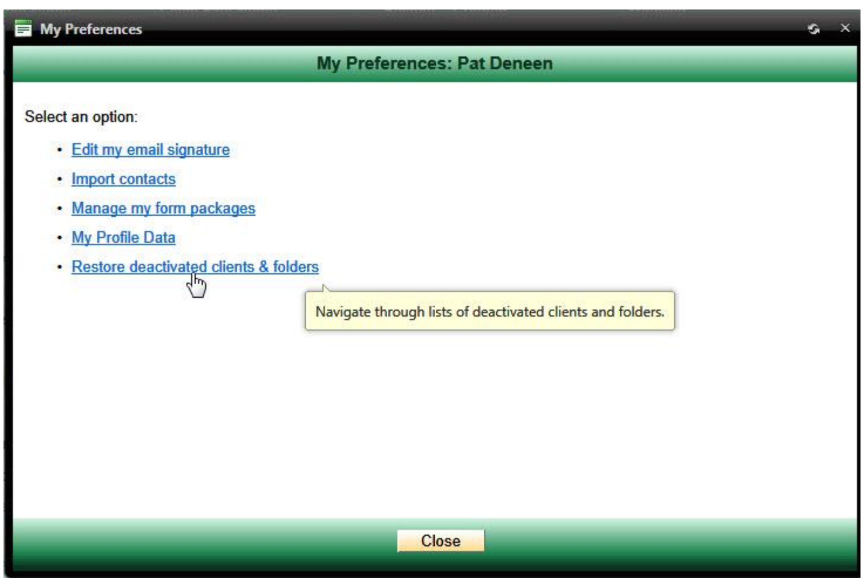
It is important to note that when FormsPro deactivates clients or folders, it **does not delete them**. Deactivated clients or folders may be **restored** at any time – they may be added to and edited. This provides you with flexibility and saves you time when a client returns to you for real estate needs!

To restore a client:

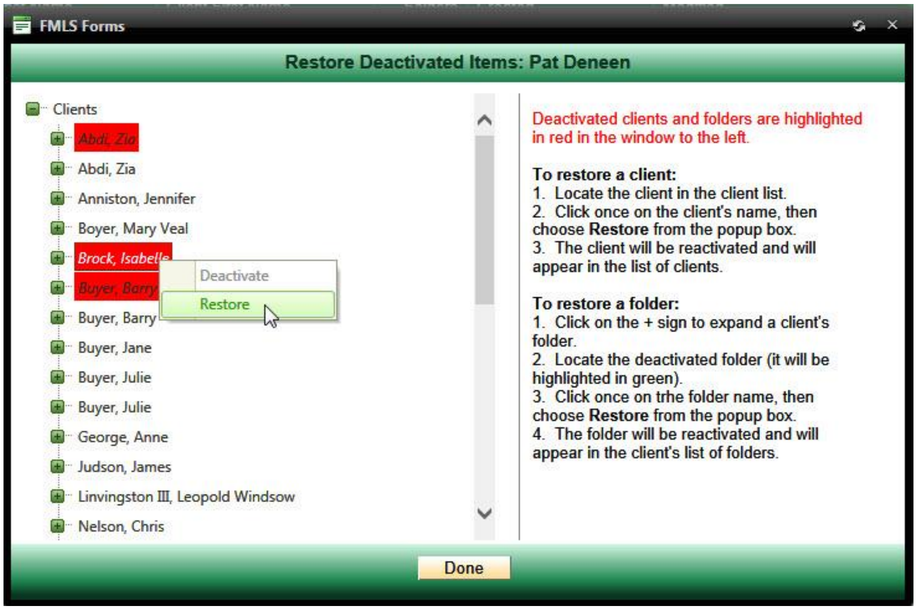
1. Hover over **Preferences** on the Main Menu bar.
2. Click **My Preferences**. The My Preferences window opens.



3. Click on the **Restore Deactivated Clients/Folders** link.



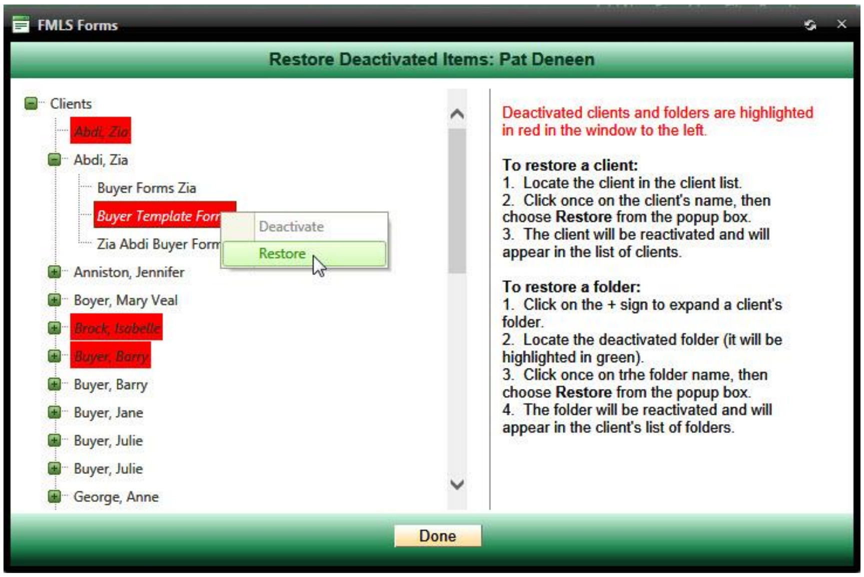
The Restore Deactivated Items window opens.



4. Click once on the client's name from the list of clients.
5. Click on **Restore** in the pop up box.
6. Click on the **Done** button.
7. Click **Close** to exit the My Preferences.
8. Click **Refresh** button to see the restored client in the list.

To restore a folder:

1. Hover over **Preferences** on the Main Menu bar.
2. Click on **My Preferences**. The My Preferences window opens.
3. Click on the **Restore Deactivated Clients/Folders link**. The Restore Deactivated Items window opens.



4. Click on the **+** sign to expand the client's folder in the list of clients.
5. Click once on the folder to be reactivated.
6. Click **Restore** from the pop up box.
7. Click **Done**.
8. Click **Close** to exit the My Preferences.
9. Click **Refresh** button to see the restored client in the list.

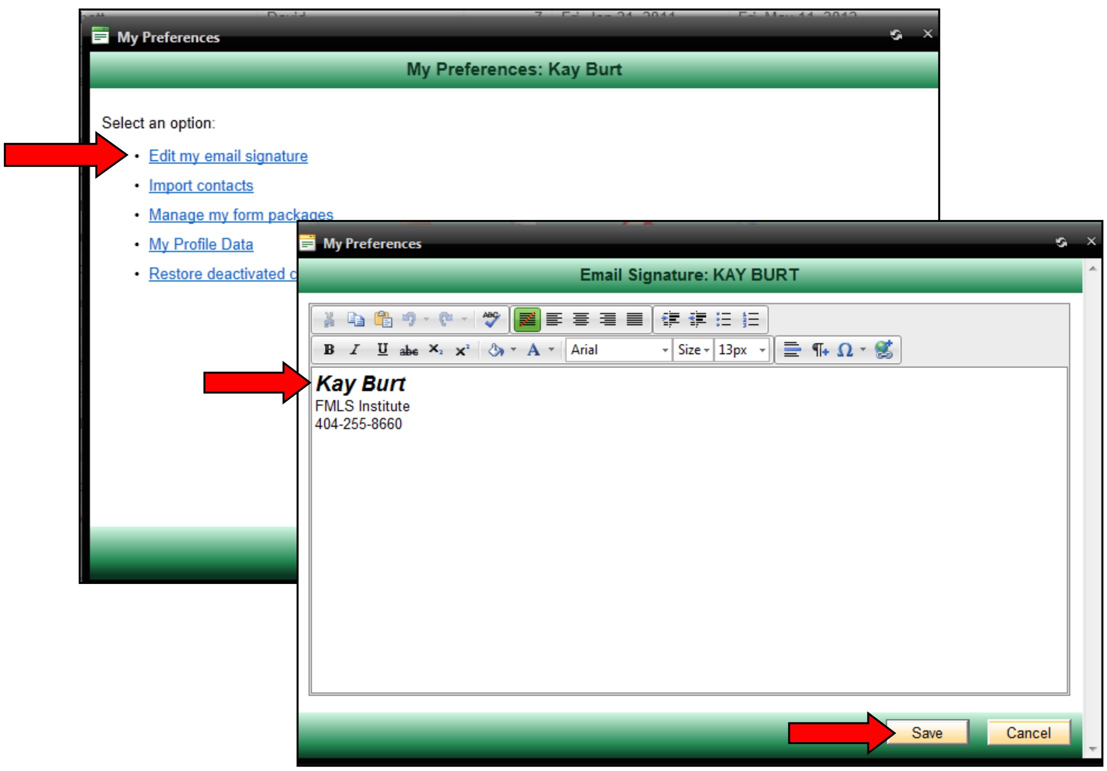
Personalizing FormsPro

Preferences give you the ability to personalize FormsPro. You will be able to create and edit your email signature, import contacts from other programs, manage forms packages, and restore deactivated clients and folders.

eMail Signature

1. Hover over **Preferences**.
2. Click on **My Preferences**.

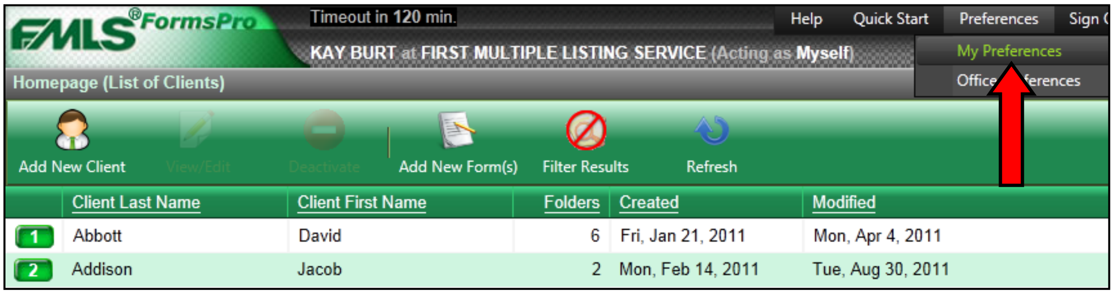
3. Click on the **Edit My Email Signature** link.
4. Type your desired email signature.
5. Click on the **Save** button.



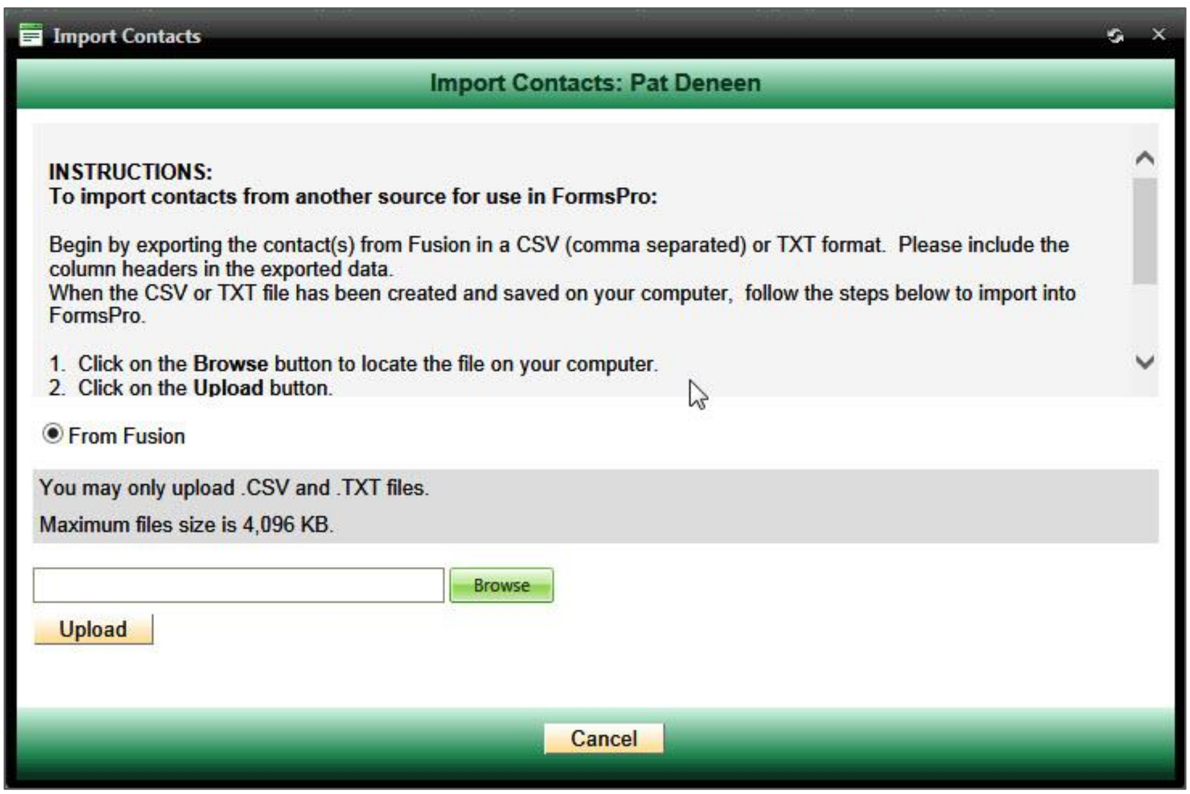
Import Contacts

You can import your Fusion contacts or contacts from another Contact Management system into FormsPro. Before you import, you must save your list of contacts as a csv file.

1. Hover over **Preferences**.
2. Click on **My Preferences**.



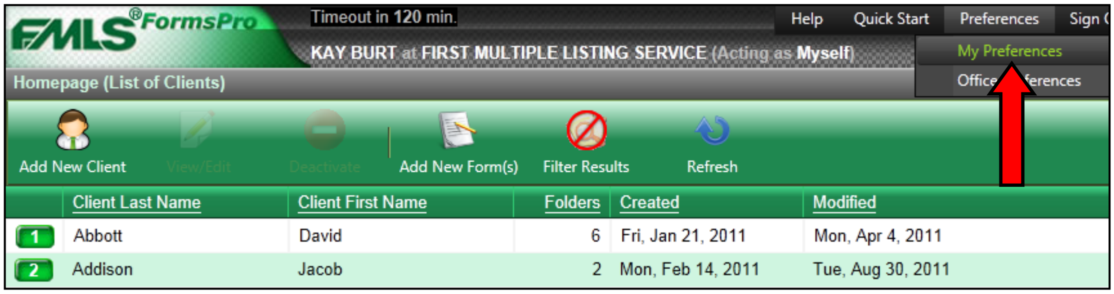
3. Click on the **Import Contacts** link.
4. Browse to find your CSV file.



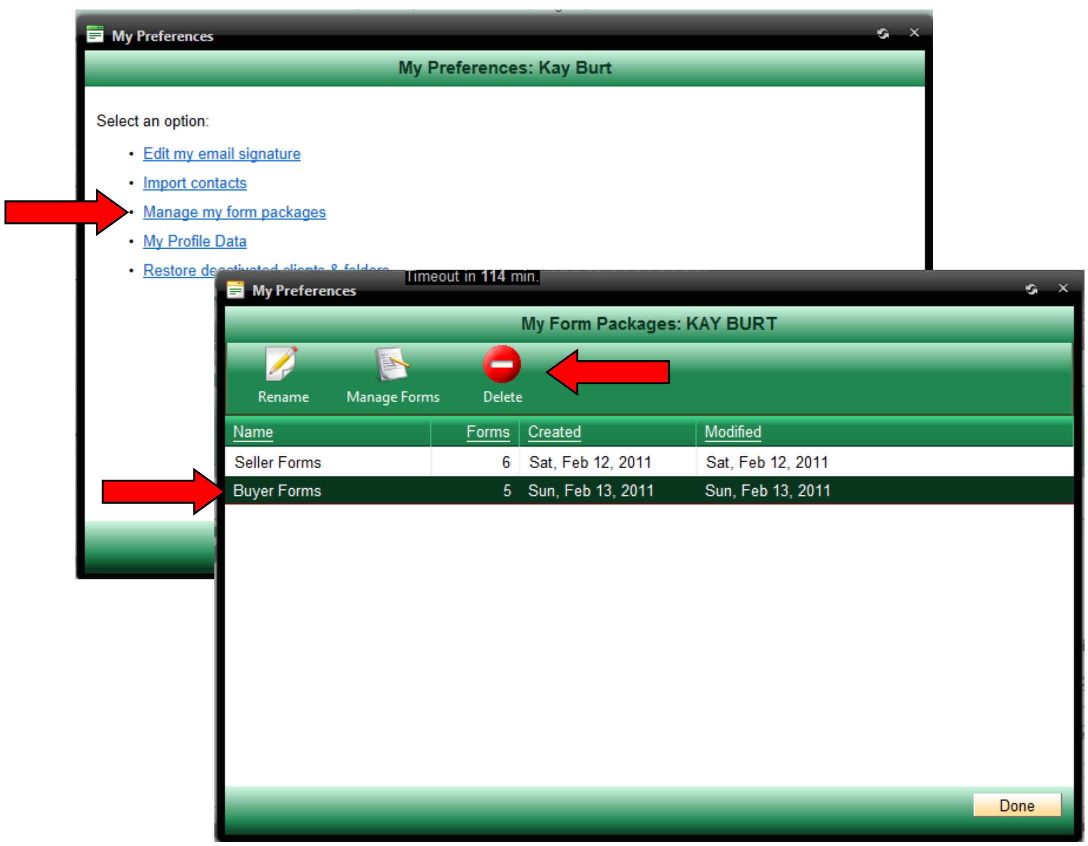
5. Click on the **Upload** button.
6. Continue to follow screen directions to import contacts.

Manage My Forms Packages

1. Hover over **Preferences**.
2. Click on **My Preferences**.



3. Click on the **Manage My Forms Packages** link.
4. Click to highlight a forms package for editing.
5. Use the icons on the menu bar to Rename, Manage Forms, or Delete a forms package.

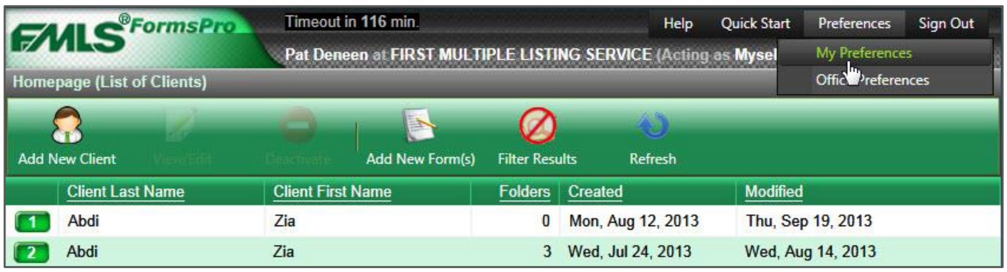


My Profile Data

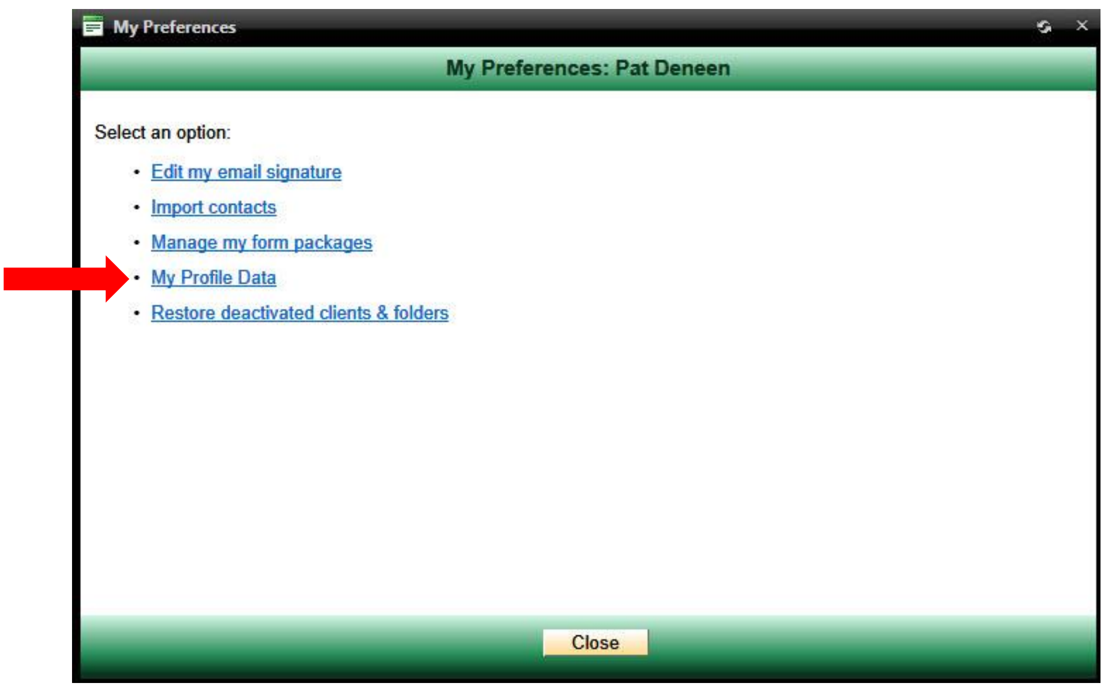
Your personal information stored in the Profile Data screen in FormsPro is used to auto-populate fields in GAR forms - exactly as it appears. If you would prefer to have the fields populate differently, you can update this information. Changing your information on this screen does not change your roster information in the FMLS database. Changes here will only affect new transactions in FormsPro. Previously populated forms will remain unchanged.

To change your FormsPro Profile Data:

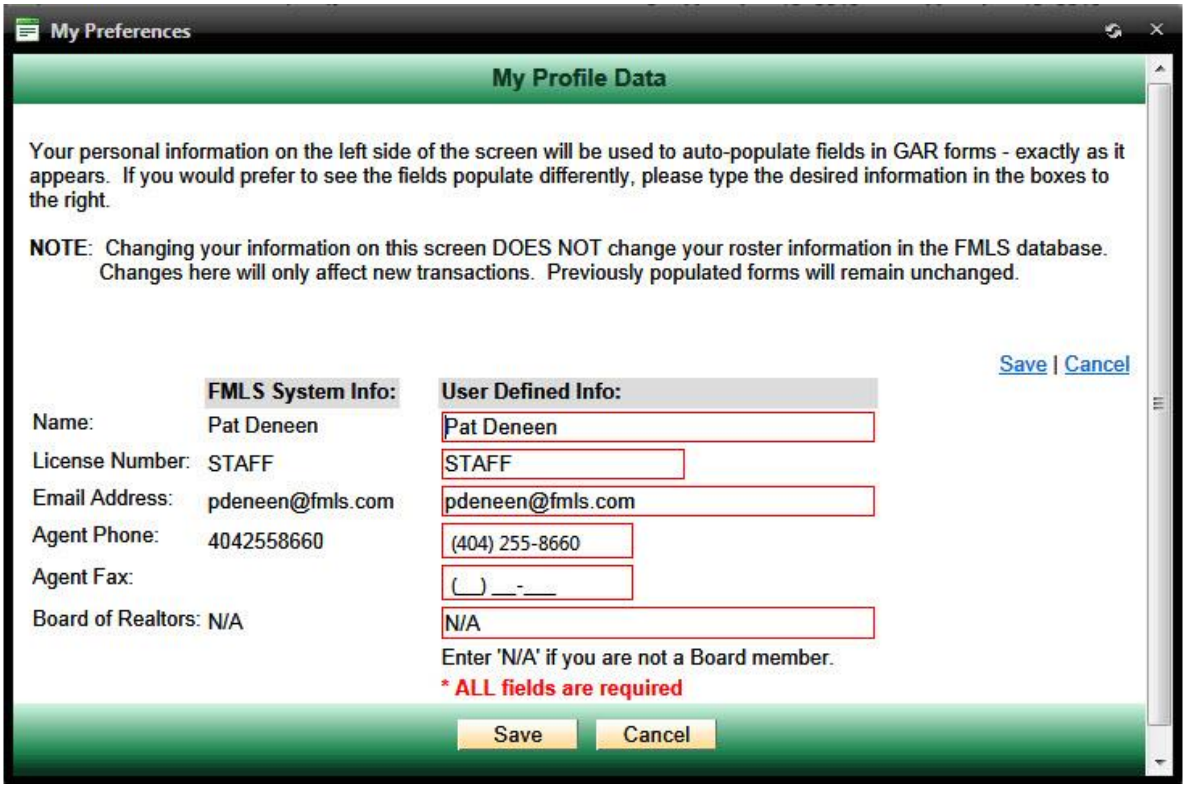
1. Hover over **Preferences**.



2. Click on **My Preferences**. The My Preferences window appears.



3. Click on the **My Profile Data** link.



4. Type your personal information in the boxes on the right side of the screen exactly as you want to see the information auto-populate in fields on GAR Forms.

5. Click on the **Save** button.

Additional eSign Features

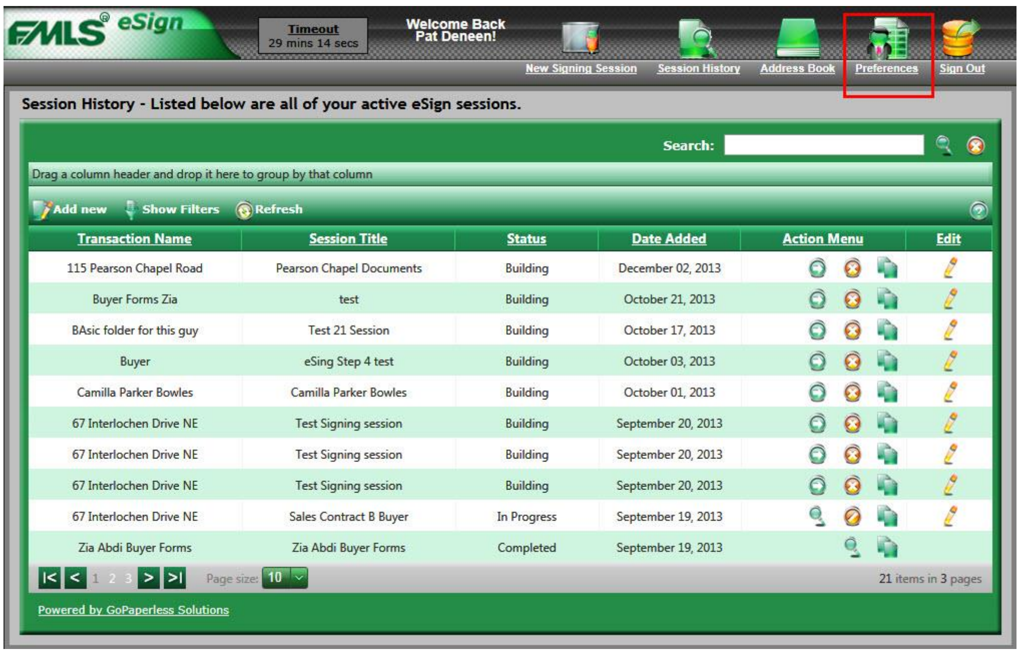
This section describes additional functions and operations that are useful in tailoring eSign to fit your business needs.

Preferences

Additional eSign tools are available in Preferences to customize the program so that agents realize maximum productivity.

To access eSign Preferences:

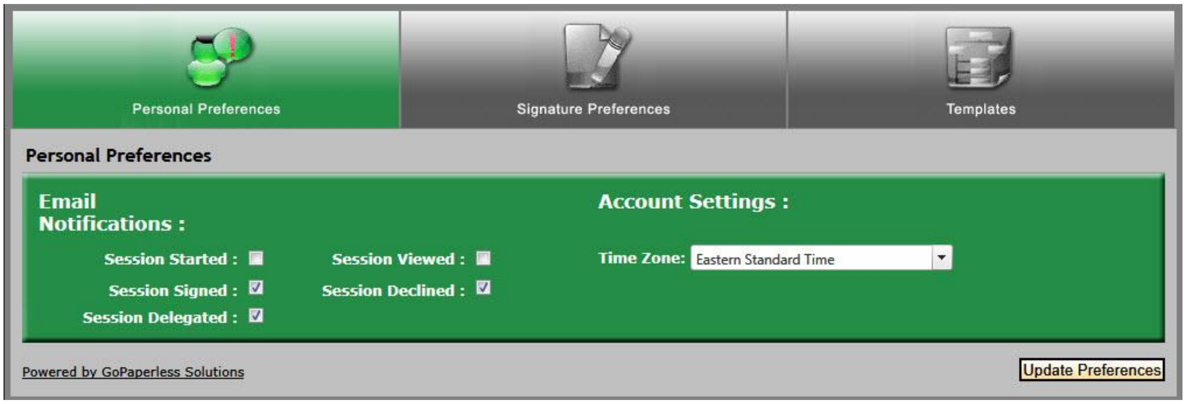
1. From the Quick Start menu, click **eSign History**.
2. Click on the **Preferences** button. The Preferences screen appears.



Three sections are available in Preferences: Email Notification, Signature Preferences, and Templates. Each section is covered in the following pages.

Email Notifications

At various points in the signing session, you receive emails to notify you of particular actions. You can choose which emails you want to receive by placing a check in the checkbox.



In the Personal Preferences section, click on the Email notifications you want to receive.

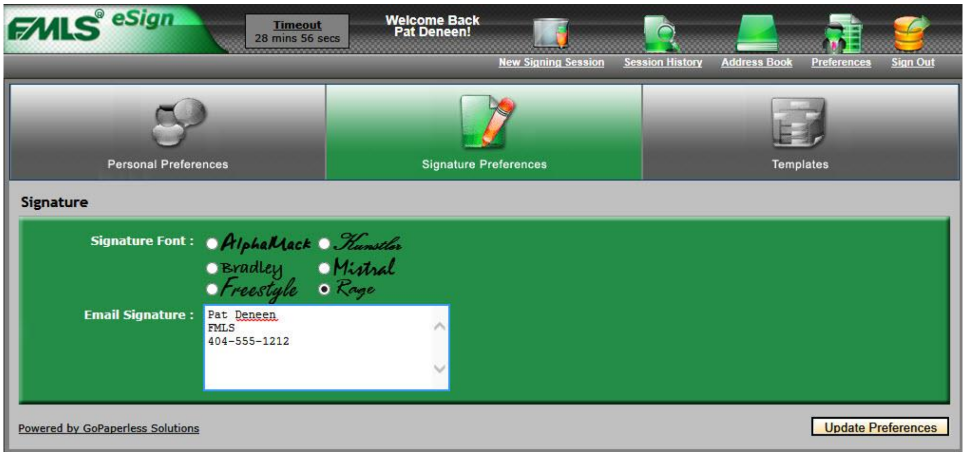
Field Name	Description
Session Started	Receive an email when the signing session is started.
Session Signed	Receive an email when each signer signs the document(s).
Session Delegated	Receive an email when a signer delegates the session to another individual.
Session Viewed	Receive an email when a signer views the session.
Session Declined	Receive an email when a signer declines to sign a document.

Click on the **Update Preferences** button.

Signature Preferences

You can set your preferences for the Signature font you use for every signing session and for all your eSign emails.

1. Click to choose a font for every signing session. This will eliminate the need for you to make the choice every time you need to sign a document.



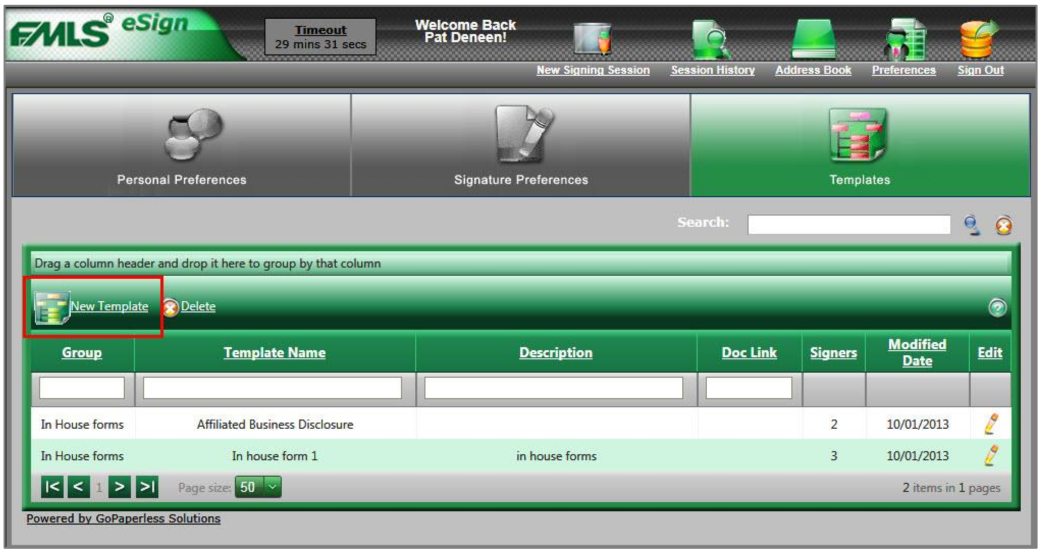
2. Type an email signature in the box provided.
3. When you are done, click **Update Preferences**.

Using Form Templates

Templates enable you to map signature locations on documents that are not part of the GAR or R.E. Forms libraries, but are frequently used. Creating a template eliminates the need to drag and drop signature boxes onto the document(s) each time they are used.

To create a template:

1. Click on **Preferences**.
2. Click on the **Templates** button.

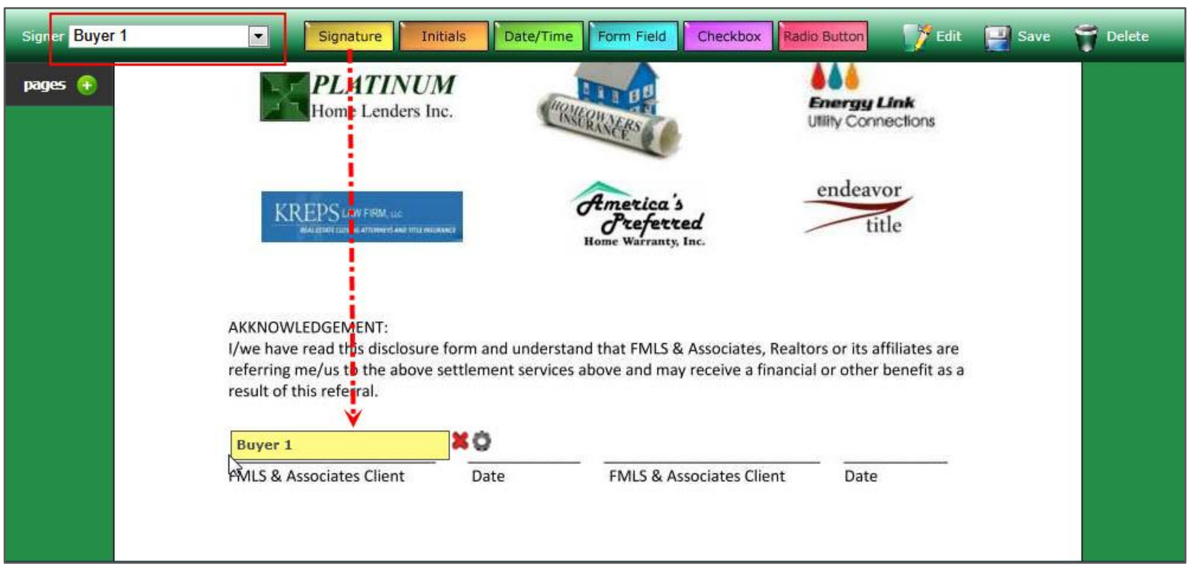


3. Click the **New Template** icon. The Template Details screen opens.

4. Complete the Template Details screen.

Field Name	Description
Title	Enter a title for the template
Group	Enter a name for a group; for example, in-house forms.
Description	Enter a description of the form.
Buyer through Other Signer	Type the number of signatures needed for each signer type in the box provided.
Document	Click Browse to locate the form for mapping and template creation.

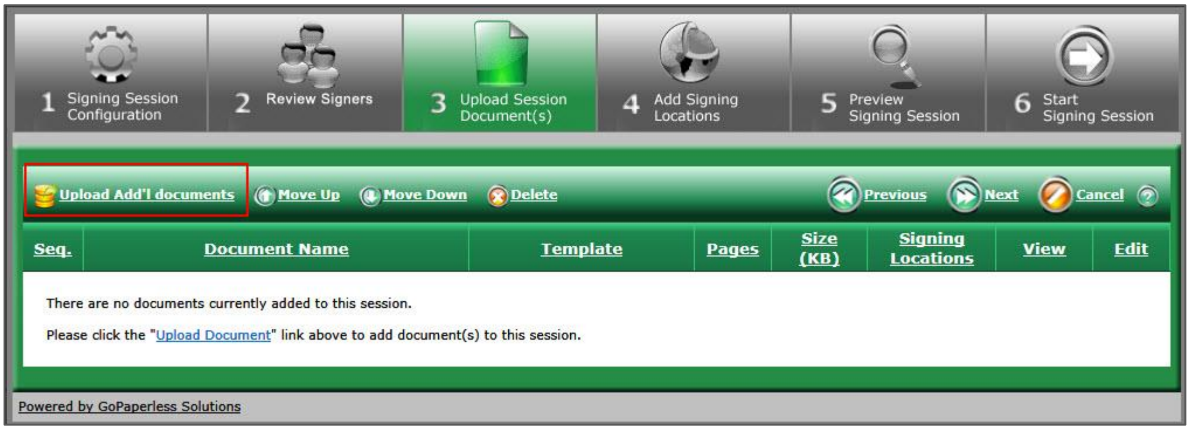
5. Click on the **Save Details** button. The form uploads and opens.
6. Drag and drop signature boxes (or initials, or date, etc) to the appropriate place on the form for each signer.



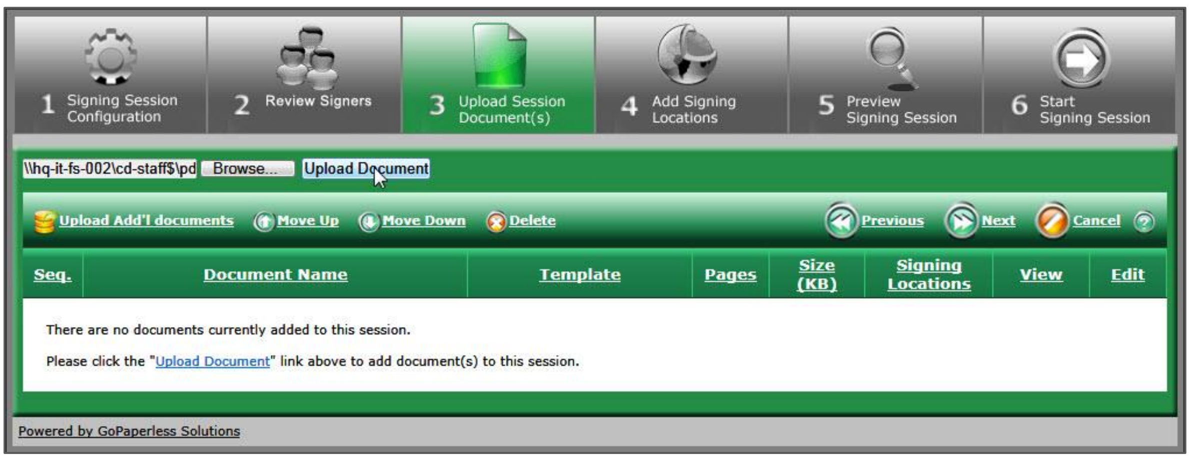
7. Click the **Save** button to continue. The template appears in the list.

To use a template:

1. Start a signing session.
2. In Step 3, click the **Upload Add'l Document** to upload the custom document to the list of documents.

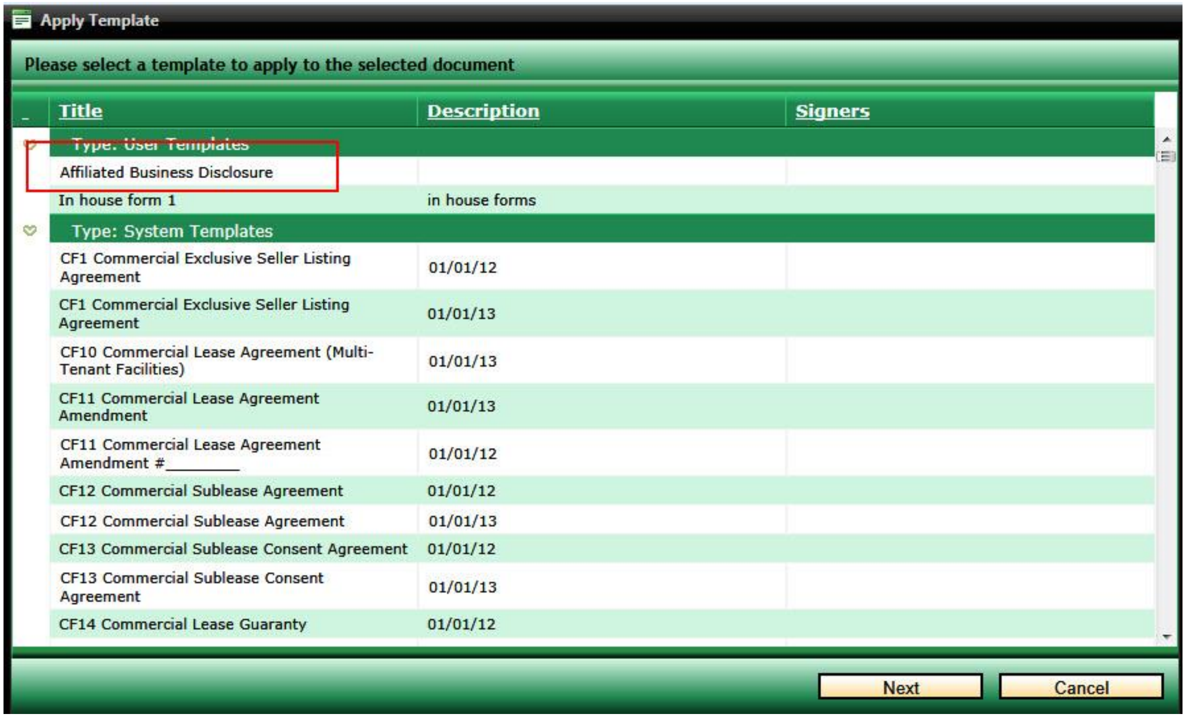


3. Browse to and select the document you are adding.
4. Click **Upload Document.**

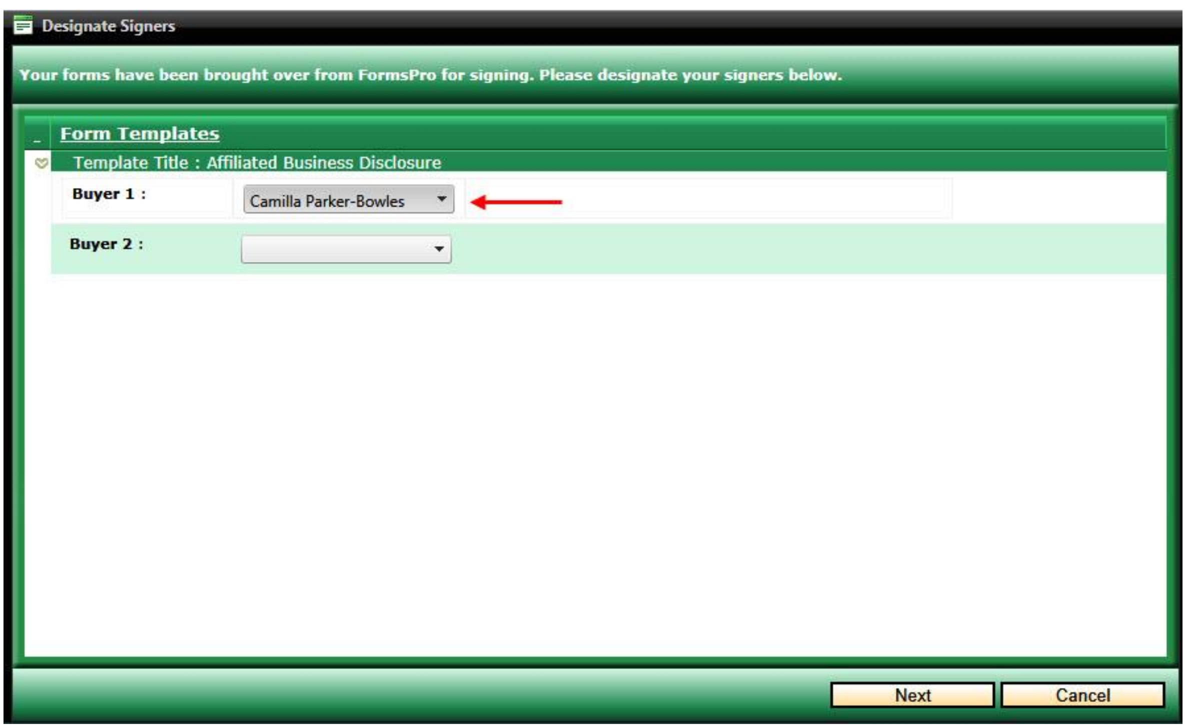


5. When the document appears in the list, click on the **Template icon** in the View column.

6. When the list of Templates appears, locate the appropriate template in the User Templates section and click once to highlight it.

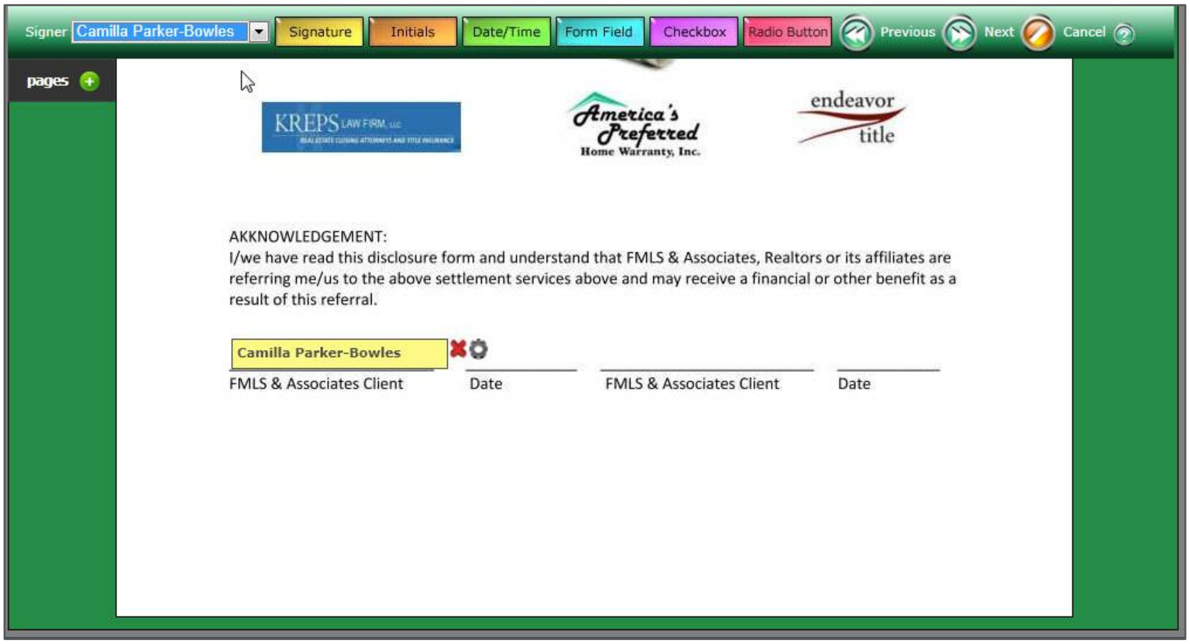


7. Click on the **Next** button to continue. The Designate Signers screen appears.



8. Use the pick list to choose the names for the mapped signatures.

9. Click on the **Next** button. The additional form is added to the list.
10. Click **Next** to move to Step 4.



11. Continue with the signing session as usual. The template is applied to the form.

Review of Objectives

At the end of this course, you will be able to:

- Access and navigate FormsPro.
- Use FormsPro to create digital real estate contracts.
- Print and email digital contracts.
- Create Forms Packages to streamline FormsPro usage.
- Deactivate clients and folders.
- Use Preferences to customize FormsPro, manage Forms Packages and restore deactivated clients and folders.
- Access and navigate the FMLS eSign site.
- Create an electronic signing session; upload documents to be signed; and add signing locations to contracts.
- View a signing session's progress/history.
- Create signing templates for non-GAR and/or non-R.E.Forms.

Wrap-up Questions

- Where are the two buttons that will take you to FormsPro?
- How do you print blank contracts in FormsPro?
- How do you access FMLS eSign?
- Where do you go to download a signed version of a contract?
- What are the 2 signature choices available for a signer as he begins a signing session?

Appendix - Setting up Intelligent Zones in a Document Signer Field

eSign permits you to set up special Intelligent Zones within a document. These zones allow you to place special conditions on a field, such as requiring a response, selecting one in a series, or requiring that if a certain condition is met, a response is required.

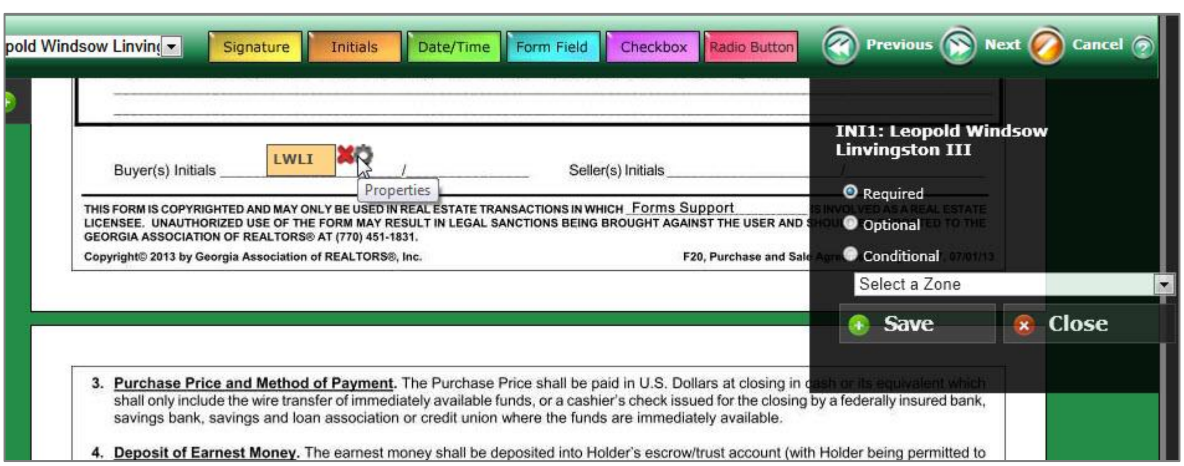
Required vs. Optional vs. Conditional Signing Fields

Required	The default condition is Required. This means that the signer must respond to this field.
Optional	If you select Optional, then the signer has the option to respond or to skip this field.
Conditional	Conditioning a signing field means that you tie one signing field to another, depending on what you select, the conditioned field will act upon whatever happens to the other signing field. Using this drop down menu, you can choose which Signature field you wish to condition. Once selected, another drop down menu appears. This is where you must choose what the condition of the field is. For example: Let’s say we have one check box and one signature field. We’ve selected the signature field and changed it so it is conditioned upon CHK1 that is a check box. We set the condition where if CHK1 is checked then the signature is required. If it is not selected then it is hidden from view.

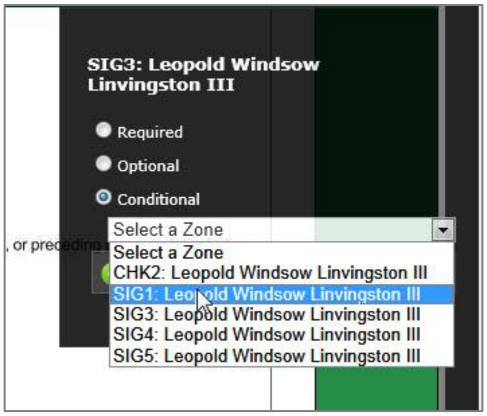
Signature Button/Initials

When you drag down or select a previous inserted Signature field or Initials field, you can place a condition on these fields.

1. Click the **Gear** icon next to the signature indicator. The Properties dialog window appears.



2. Select the radio button to indicate whether the field should be Required, Optional or Conditional.
    - The default condition is Required. This means that the signer must respond to this field.
    - If you select Optional, then the signer may choose to respond or to skip.
    - If you select Conditional, then the signer must respond to this field, if the signer responded to a previous field.



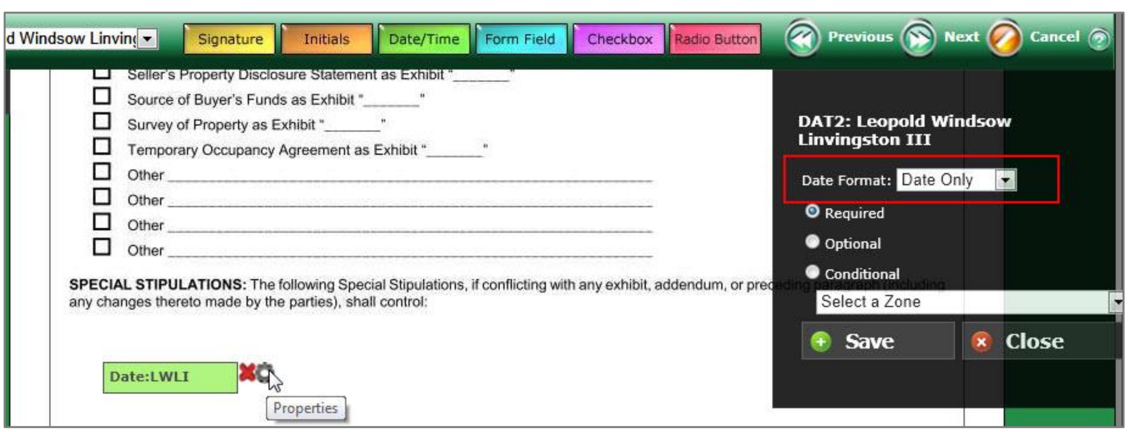
3. Click the drop-down arrow to select the field that you want to make the contingent field.

Date and Time

If you insert a Date/Time field in a document and want the time only, you must change the type of field.

1. Click the **Gear** icon next to the field. The Properties dialog window appears.
2. Select time from the drop down list next to date format.

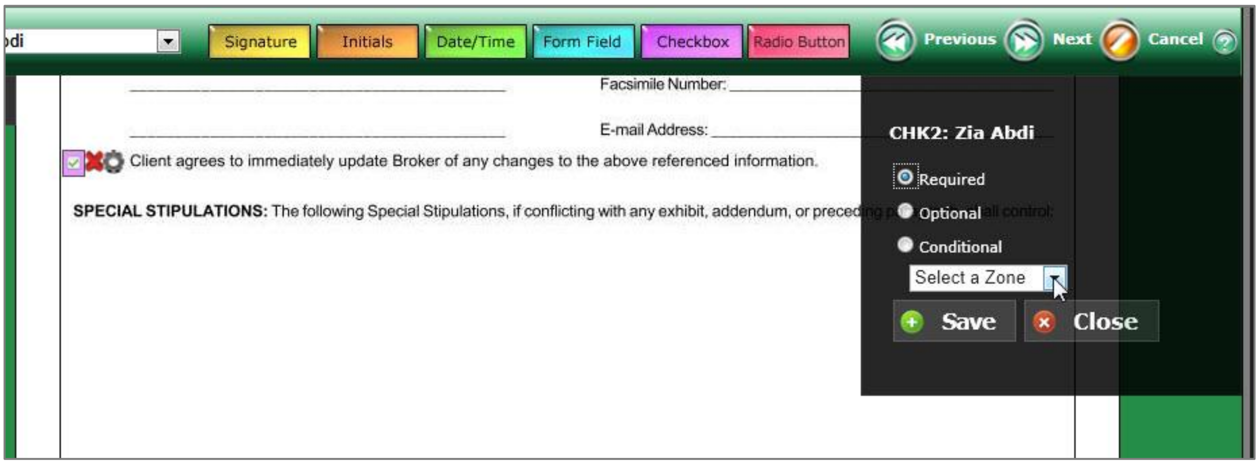
Please note the box will still show DATE: Initials even though you have selected the Time or Time and Date options.



3. Select the radio button to indicate whether the field should be Required, Optional or Conditional.
   - The default condition is Required. This means that the signer must respond to this field.
   - If you select Optional, then the signer may choose to respond or to skip.
   - If you select Conditional, then the signer must respond to this field, if the signer responded to a previous field.

Check Box

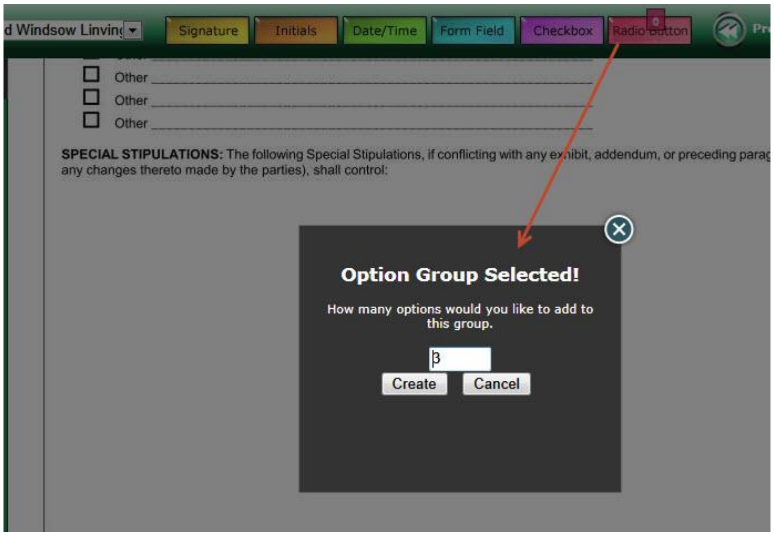
You can add a check box if you want the signer to acknowledge an item on a form. By default, check boxes are optional to sign, though you may make them Required or Conditional on another field.



1. Click the **Gear** icon next to the field. The Properties dialog window appears.
2. Select the radio button to indicate whether the field should be Required, Optional or Conditional.
   - The default condition is Required. This means that the signer must respond to this field.
   - If you select Optional, then the signer may choose to respond or to skip.
   - If you select Conditional, then the signer must respond to this field, if the signer responded to a previous field.
3. Click the drop down list next to place the conditional item on the field.

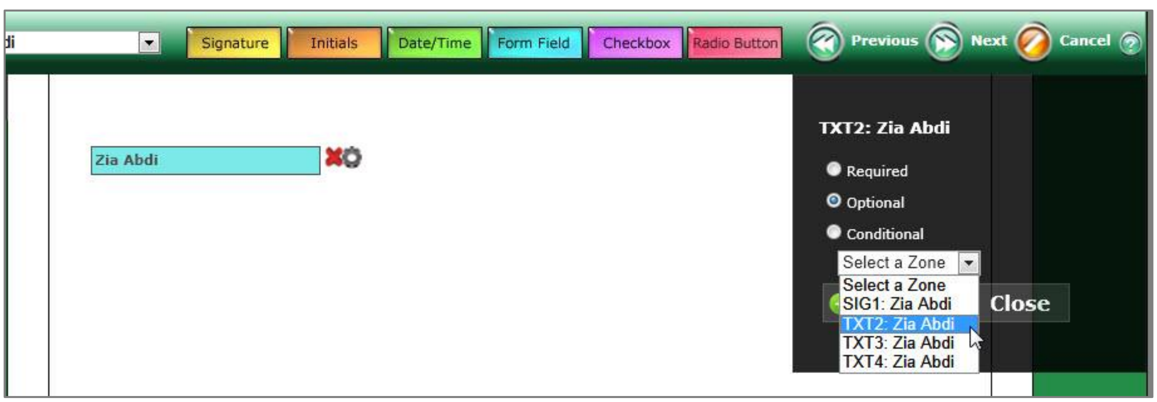
Radio Button

When you select radio buttons, a pop up menu will ask you how many you wish to create. The default is 3; however, you may change that to a higher or lower amount. Please note that each time you create a radio button groups they are tied together so only 1 of the entire group may be selected by the user. Also radio buttons are optional to sign by default.



Form Field

You can create a Form field that the signer must type in a response. For example, you would use this if you wish for a signer to enter their email address into a blank field. By default, Form fields are required to sign, but you can mark them as Optional.



FMLS Course Offerings
(All courses are provided to FMLS Members FREE of charge)

3 Hour CE Classes

Fusion 101: Working with Buyers
(3.25 hours) 3 CE Credits

In this course, students will learn how to: search for one or multiple properties by various parameters, how to extract and analyze property information, and utilize the information to prepare for showings; how to create and save customized searches and results grids; how to use advanced mapping to visualize location and accessibility to key landmarks, spot points of interest, search for properties in a specific geographic area, and generate driving directions; how to prepare reports and share property information with their clients via email to aid them in the property selection process.

Fusion 102: Working with Sellers
(3.25 hours) 3 CE Credits

Students will learn how to: search for information on a subject property using the FMLS database, the FMLS History Report and tax records; how to extract and analyze pertinent information and import comparable properties' data into two different CMA Reports; how to analyze area statistics for a listing presentation; how to utilize available tools for inputting and enhancing a listing; how to run a reverse prospecting search to identify agents with prospective buyers.

Fusion Advanced: Prospecting & Managing Contacts
(3.25 hours) 3 CE Credits

Students will learn how to: use Fusion's suite of Contact and Search Management tools to communicate with their clients. Students will also understand and utilize property search auto-notification settings and how to create a personalized client website to house listing information. Students will leave with an understanding of how to manage, track and follow up with their clients and prospects.

Realist 101: Utilizing Property Centric Data for Deeper Insight into the Real Estate Market
(3.25 hours) 3 CE Credits

In this course, students will learn how to: search for one or multiple properties by various parameters and export the records into standard mailing label format for marketing purposes; extract pertinent information from property records; generate reports to analyze comparables, market trends, and neighborhood/area profiles; create and save customized searches and results grids; use advanced mapping to visualize location and accessibility to key landmarks, spot points of interest, search for properties in a geographic area, and quickly identify key indicators (such as foreclosures, listing information, and distressed sales.

Realist 201: Mining Property Data for Greater Insight into the Real Estate Market
(3.25 hours) 3 CE Credits

This course is formatted uniquely to answer agents' specific "how to" questions for finding buried data, and to provide insight on creative ways to use the features covered In the Realist 101 class. Students will learn how to: create and save custom searches to retrieve specific information; search for homes in Foreclosure; use the Realist Map to refine a search geographically; export Realist data to spreadsheet software for further manipulation; use map tools to obtain market data and ownership information.

Document Management 101 - Digital Documents and Signatures
(3.25 hours) 3 CE Credits

Learning to use tools to create, save, share, and sign documents digitally is critical in todays technology-driven world. Buyers and Sellers are expecting real estate professionals to use electronic signing and smart mobile devices to communicate and to process transaction documents more frequently. In this course, students will learn how to use FormsPro to create real estate contracts, and how to request signatures electronically using FMLS eSign.

Document Management 102 - Digital Document Storage
(3.25 hours) 3 CE Credits

Due to the rapid consumer adoption of smart mobile devices, it is predicted that mobile usage will overtake desktop usage by 2015. Learning to use tools to store and share documents online will prepare agents for this trend now and allow them to be more organized and efficient during a real estate transaction. Students will discuss and practice electronic document storage using DocuPro and become familiar with other time-saving tools for document and task management.

Marketing 101 - Marketing Your Listings with FMLS Tools
(3.25 hours) 3 CE Credits

Coming Soon

The real estate market is highly competitive and agents must develop creative marketing strategies to sell their listings. Simply providing listing data and photographs to a multiple listing service is no longer enough! Exceptional photos with descriptive text, virtual tours, accurate mapping of properties for driving directions, the availability of documentation such as disclosure statements, open houses and caravans are necessities. Free FMLS tools, such as Property Panorama, along with free software available on the internet for photo editing are explored to provide more power for listing agents.

Webinars

Fusion Fundamentals

Learn the basics of Fusion! Participants will gain an understanding of the Fusion gadgets; how to perform a search; and how to review search results. The class will also provide a brief overview of Fusion's more advanced features such as the CMA Wizard, client website options; auto-notification; and StatsPro.

FMLS Course Offerings (continued)
(All courses are provided to FMLS Members FREE of charge)

Introduction to Social Media for Real Estate: Marketing Online and Blogging for Business

This webinar offers an introduction to the world of social media, and suggests solid first steps to help agents introduce social media into their marketing and PR efforts. Students will learn: what Social Media is; why it is important to business; the most popular types of social media and how to use each effectively; how to measure the ROI (return on investment) of social media.

CMA Basics - Researching and Preparing Comparable Reports Using Fusion

Learn: how to research a subject property in preparation for a listing presentation; how to search the FMLS database for comparable properties; how to review market statistics for the area around the subject property; how to prepare 2 formats of CMA reports; and how to enhance the Fusion data with data from the tax database.

Getting Started with Realist: Using Tax Data to Boost Market Knowledge

This webinar provides a walk through of the basics of Realist. Participants will gain a general understanding of how to access and navigate the program; how to perform searches for single or multiple properties; how to generate reports for comparable properties, market trends and neighborhood profiles; and how to use the Realist map and it's overlays for more market info.

GoFMLS: Your FMLS Mobile App for Your Mobile Life

This webinar will provide attendees with an introduction to GoFMLS, an exciting, robust mobile application. GoFMLS lets you search property listings, view critical property details including price, square footage, remarks, showing instructions and more. GoFMLS uses GPS technology to pinpoint your location and display nearby listings. Stay connected to FMLS, run agent roster searches, search both on and off market properties and instantly access your own listings. You can even instantly share listings with your clients. The Home Assist feature allows agents and consumers to collaborate remotely on the home search process. All of this and more is available for free for FMLS members using iOS and Android devices. For other devices, a web version is also available.

Add/Edit in Fusion

Learn: how to navigate Fusion's Add/Edit; the forms and procedures to list and sell properties using FMLS; what to bring to the Listing Appointment to gather the information Needed to give the listing maximum exposure; how to add the listing to FMLS; the importance of, and steps to add media; what to do when the property goes under contract; what to do when the property sells.

Getting Started with FormsPro

Students will learn how to: log into and navigate the FormsPro system; utilize FormsPro to create a digital Client Transaction folder; select and add GAR forms to a Client's transaction folder; email forms to clients; locate and print blank GAR forms and administrative forms; and locate basic troubleshooting information for FormsPro.

New Member Orientation for Brokers, Office Managers and Administrative Staff

This webinar is designed to introduce new member brokers and office managers to FMLS benefits and services. Learn to navigate FMLS.com, get an overview of products such as Fusion, and FormsPro; become familiar with additional products such as Kurio, FIND and more; understand the life of a listing and admin processes.

Getting Started with FIND: Gaining a Competitive Edge with National Property Information

Learn how to use FIND to quickly search a national property database which includes FMLS, tax and 3rd party data; gain insight into properties and areas across the US; use property details to analyze lifestyle considerations and community information; and access advanced mapping and categorization options.

Getting Started with FMLS eSign: Your Electronic Signature Solution

Students will gain an understanding of the basics of electronic signatures including security procedures and legalities. They will learn how to opt-in and access eSign; how to initiate a signing session to include specific contracts and signers; how to track the progress of the session; and how to view its history.

Getting Started with Fusion's Contact Website & Contact Manager

The webinar introduces the basics of the Contact Manager and Contact Website tools which automate searching for buyers and provides a custom website to those buying clients. It also provides an overview of Importing/Exporting contacts and bulk emailing tools.

Classes are available at all 3 FMLS locations:

Northeast Center	Main Center	Northwest Center
2250 Satellite Boulevard, Ste 215	5457 Roswell Road, Ste 304	166 Barrett Parkway, Ste D
Duluth, GA	Atlanta, GA	Marietta, GA
678-475-0544	404-255-8660	678-290-9493

Register Online:
www.FMLS.com
(log in, hover over Training, click on Training Schedule)

FMLS Technical Support **404-255-4219** Any technical questions regarding the functions in Fusion, FormsPro, or Realist (Tax) should be addressed to the FMLS Help Desk staff. Business Hours Monday through Friday 9:00 am – 5:00 pm. Weekend Saturday 8:30 am – 5:00 pm Sunday 1:00 pm – 5:00 pm Email: **support@fmls.com** (technical & how to questions) Email: **feedback@fmls.com** (suggestions) Live Chat: Available M-F 9am-5pm on the FMLS.com home page at the bottom of the left navigation bar.	**FMLS Administrative Support** **404-255-8660** Questions regarding listing changes, fees, computer user forms and other administrative questions should be directed to Administrative Support. Business Hours Monday through Friday 9:00am – 5 pm. **NOTE:** Use the **"FMLS Computer User Form"** to obtain a User Name & Password for a new agent, change a User Name to a different company, delete a User Name, change name or address information, change user access level, etc. This form can be located on the FMLS homepage under Administrative Support/Forms. **Fax Computer User forms to 678-904-0444 or** Email tonewuserforms@fmls.com
FMLS Hotline (Confidential voice mail where possible rule violators can be reported) **678-904-0446 - or - compliance@fmls.com** Please leave name, broker code and a phone number where you can be reached. Without this information, we can not follow through with the complaint. **Training Class Registration** Steps: 1. Visit the FMLS website at **www.fmls.com** 2. Enter your User Name and Password. 3. Hover over Training on left nav bar. 4. Click on Training Schedule. 5. Select location and class topic. Email: **training@fmls.com**	**FMLS Store Locations** **FMLS Main (Sandy Springs) 404-257-1447** **FMLS NE (Duluth) Store 678-475-0544** **FMLS NW (Marietta) Store 678-290-9493** Purchase FMLS maps, decals, clothing, software, closing gifts, display stands, measuring devices, calculators, accessories, jewelry, brochure boxes, signs, supplies, and much more. Visit one of our 3 locations or shop online at **www.fmls.com** and click on FMLS Store. To check on internet orders and shipments: Email us at: **shipping@fmls.com** **Supra Key/Lockbox Issues** **404-843-3672** Call Supra for any issues concerning lockboxes or lockbox keys. Supra stops issuing boxes at 4 PM.

FMLS has 3 convenient locations to serve your real estate needs. Each of our 3 centers offers training, real estate supplies and Supra keys and lockboxes.

FMLS Main Office 5457 Roswell Rd Atlanta, GA 30342 404-255-8660 –or- 1-800-505-FMLS 404-255-8602 (fax)	**FMLS Northwest Center** 166 Barrett Pkwy., Suite D Home Center Village Marietta, GA 30066 678-290-9493 678-290-9251 (fax)	**FMLS Northeast Center** 2250 Satellite Blvd., Suite 215 Satellite Court Duluth, GA 30097 678-475-0544 678-475-0594 (fax)

Three **Locations to Serve You:**

FMLS Main Center
5457 Roswell Road
Atlanta, GA 30342
404-255-8660
1-800-505-FMLS

FMLS NE Center
2250 Satellite Blvd., Ste. 215
Duluth, GA 30097
678-475-0544

FMLS NW Center
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