FormsPro

Broker/Admin Guide

FMLS Institute of Real Estate
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Atlanta, Georgia 30342
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Introduction

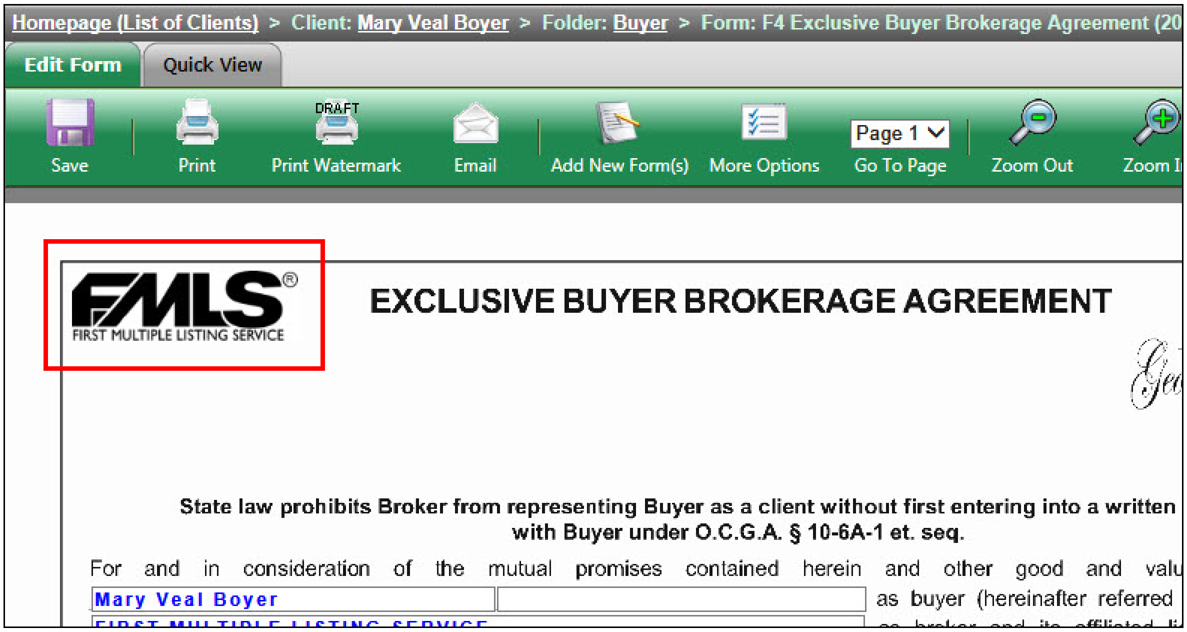
This guide is designed for Brokers and Office Managers who are responsible for the maintenance and creation of forms used by the firm in FormsPro.

Before you can perform any of the steps outlined in this guide, you must have the correct access level to do so.

Designation	Access Level
OM	Office Manager: permissions for office only
BR	Broker: permissions for office only
HB	Head Broker: permissions for entire firm
CO	Corporate Officer: permissions for entire firm

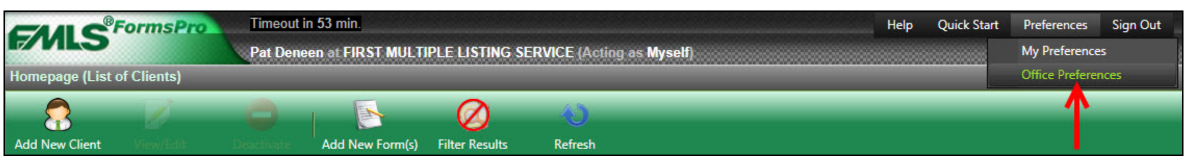
Uploading a Logo to FormsPro

It is easy to add your company logo to FormsPro. The logo appears at the top of each form as shown in example below:

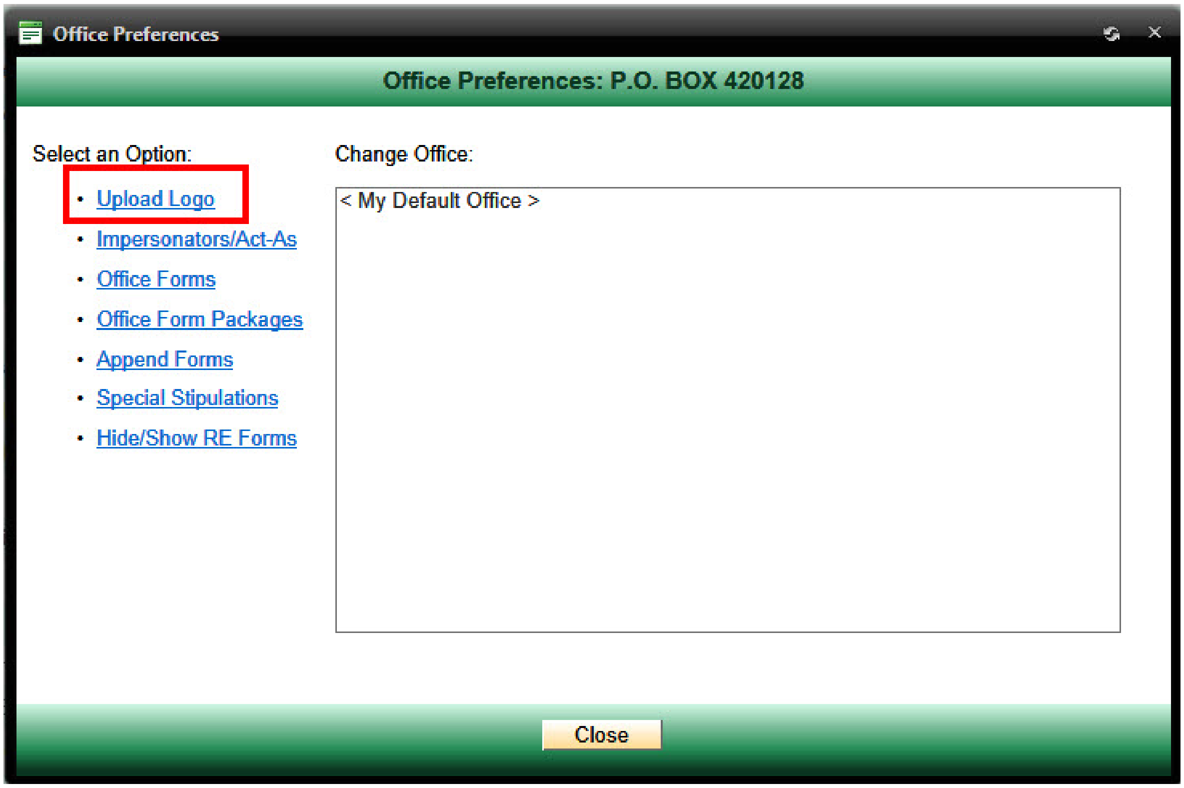


To add your logo to FormsPro forms:

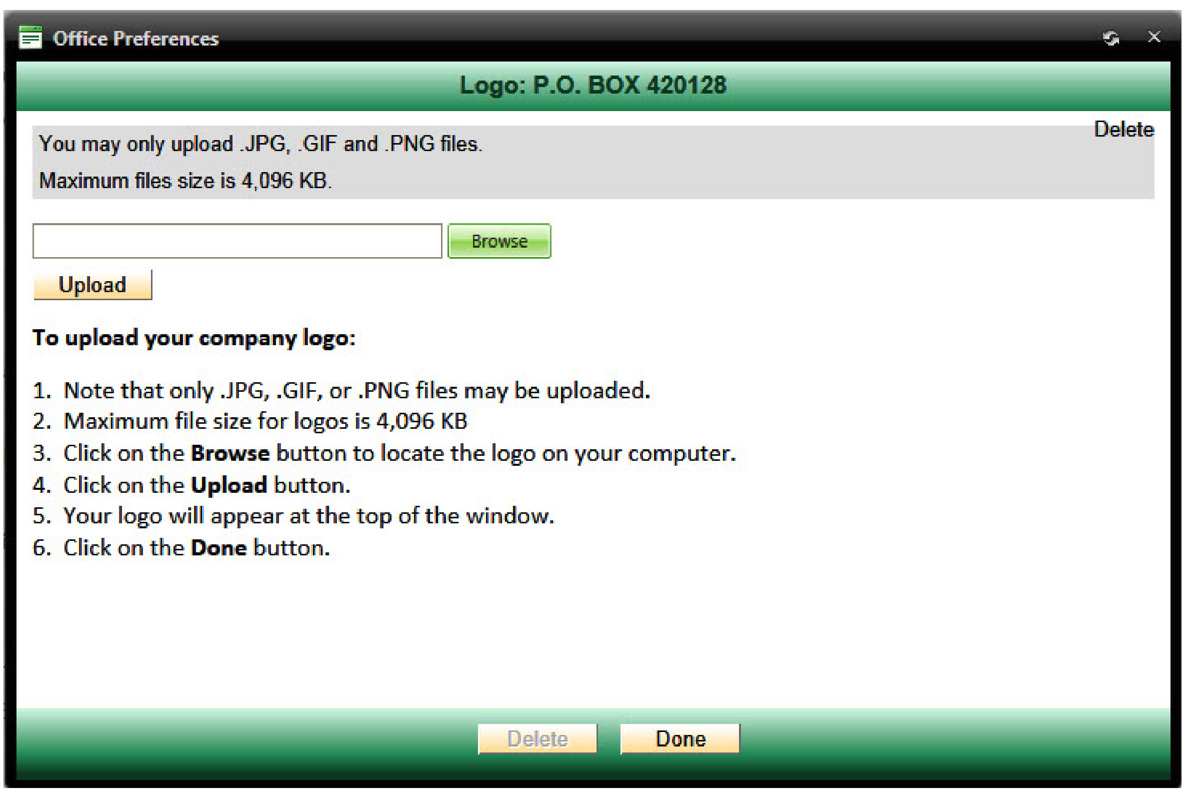
1. Hover over **Preferences** on the main menu bar.
2. Click **Office Preferences**.



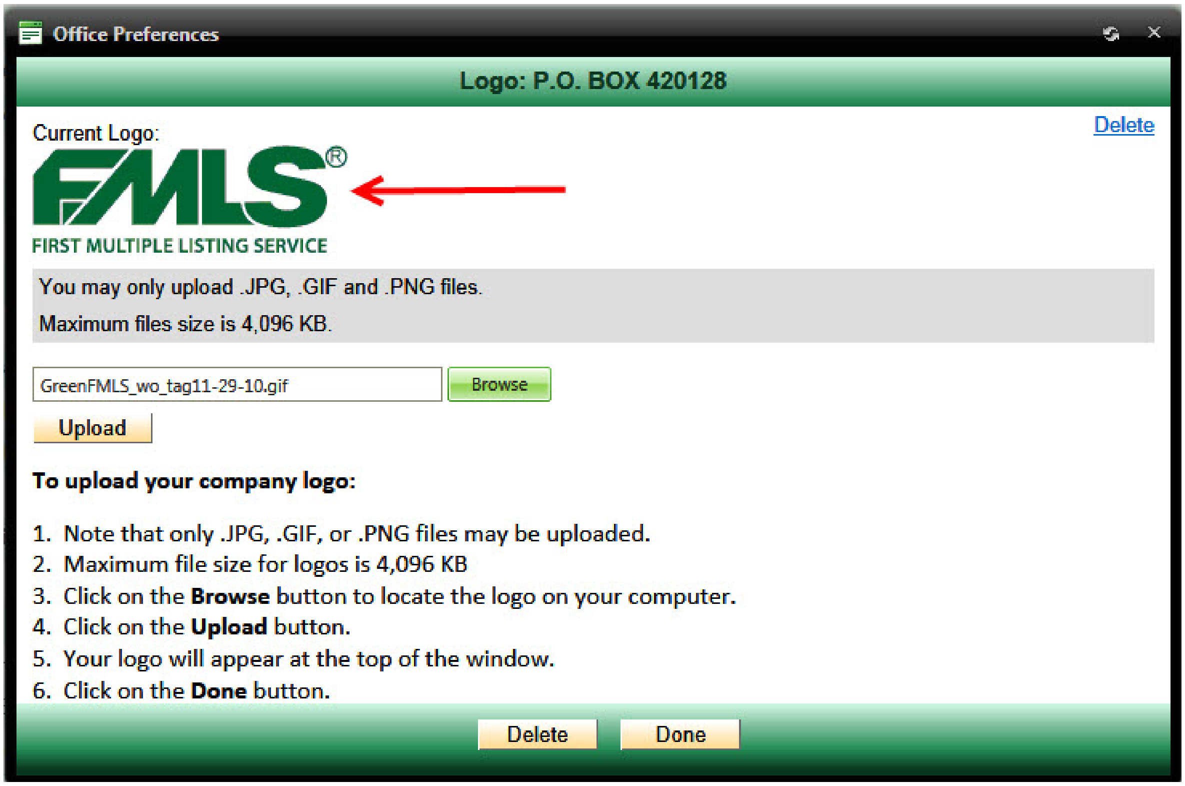
3. Click **Upload Logo** link.



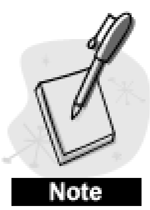
4. Click the **Browse** button to locate the logo on your computer.



5. Browse to and select your image file.
6. Click the **Upload** button. The logo appears in the upper left corner of the window.



7. Click the **Done** button to complete.



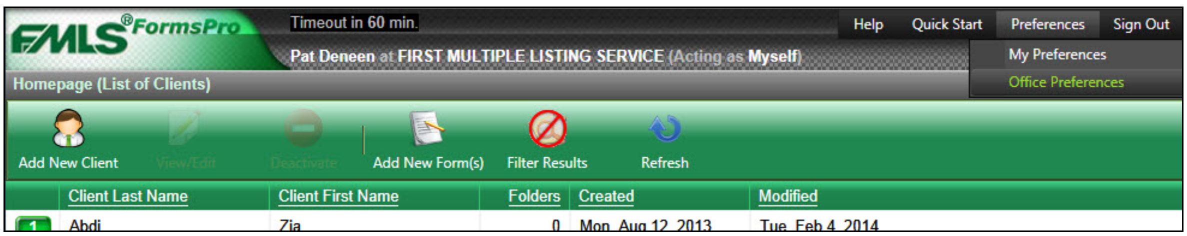
The logo may be uploaded for the entire firm (instead of for a single office) by checking the box in the window; if you have OM, CO, HB or BR permissions. FormsPro accepts JPG, GIF or PNG files. Maximum file size is 4,096KB.

Creating Impersonators (Act-As)

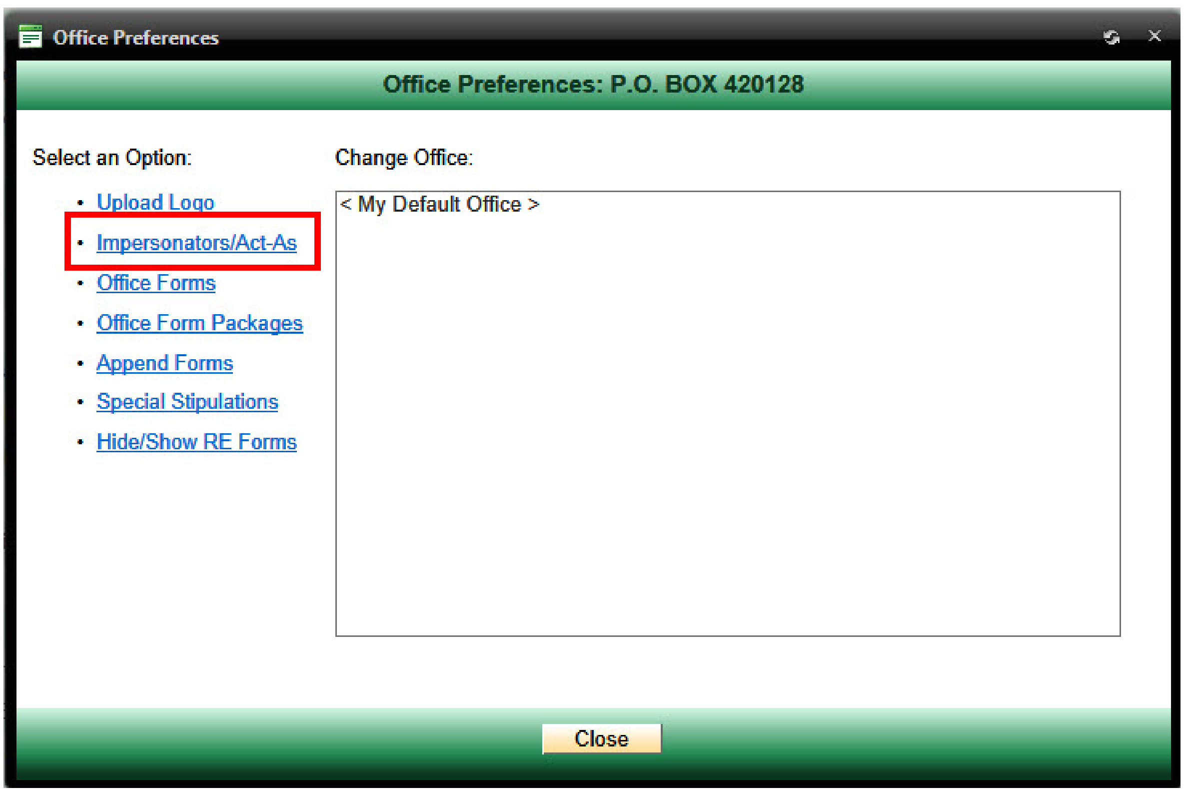
FormsPro provides the ability to allow one person to impersonate – or act as – another FormsPro user. The "impersonator" will be able to manage forms for the designated agent. This can be important for agents who are on vacation and need a co-worker to cover their business, or for team members who work on the same transaction.

To create an Impersonator:

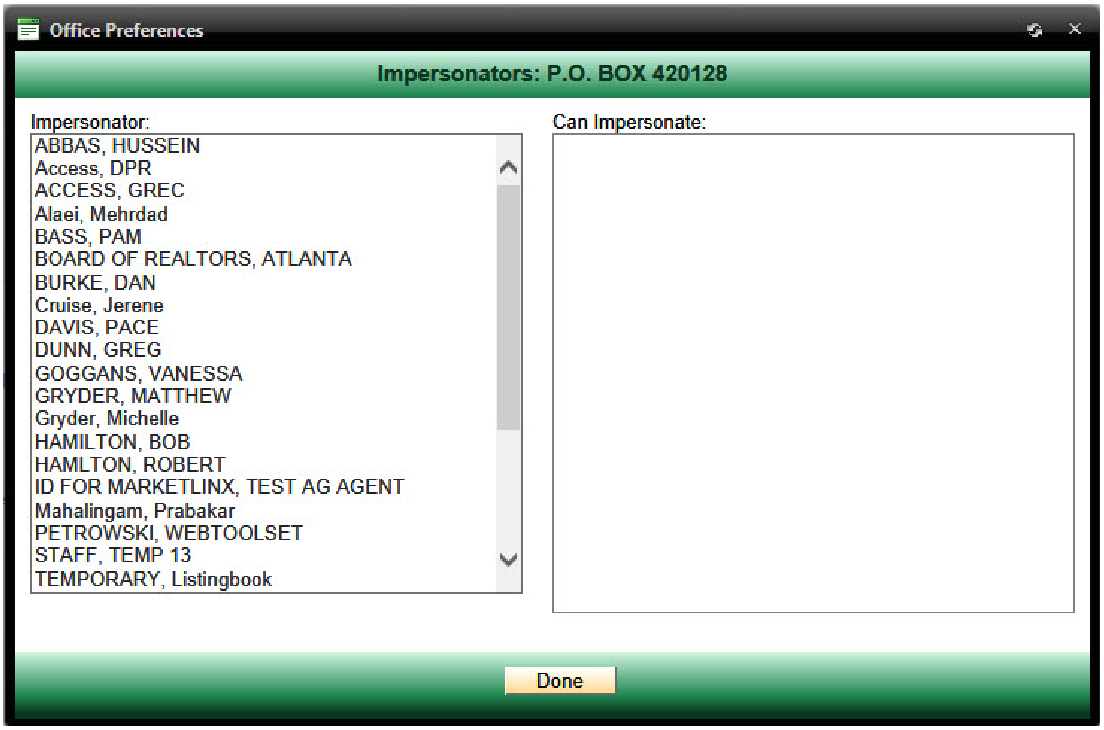
1. Hover over **Preferences** on the main menu bar.
2. Click **Office Preferences**.



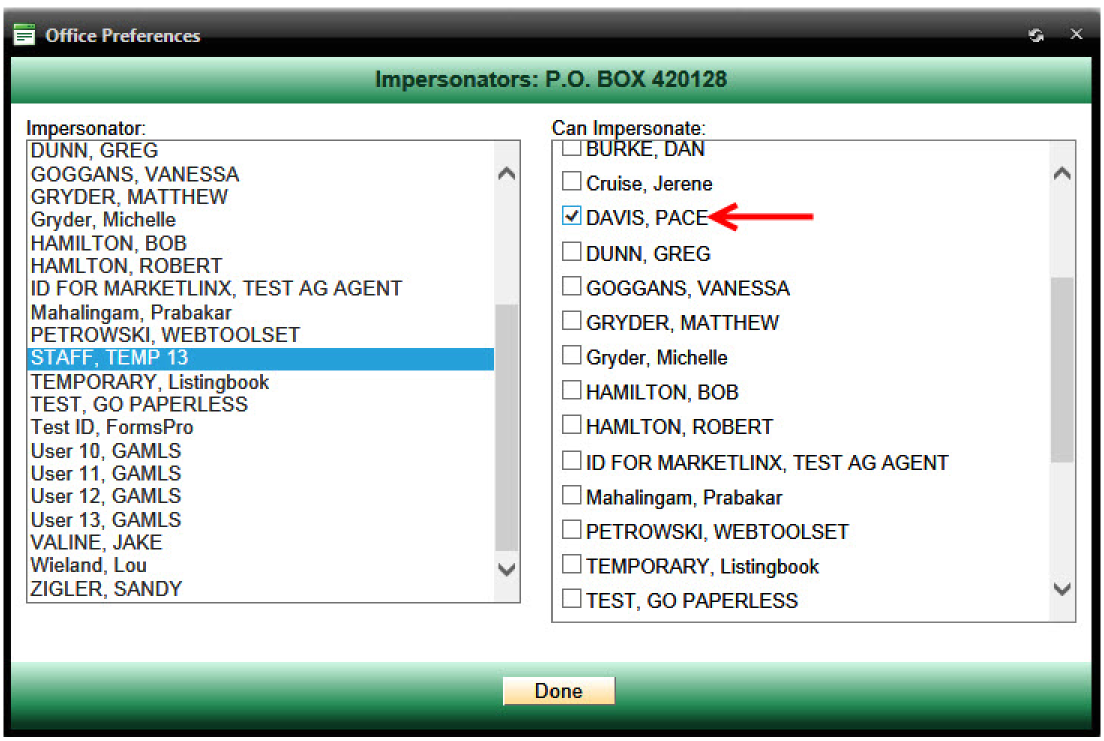
3. Click the **Impersonators/Act-As** link.



4. Locate the individual on the left side of the screen that will be able to act-as another agent and click once to highlight.



5. Locate the individual(s) in the list on the right of the screen who will be "impersonated" and click to select.



6. Click the **Done** button to finish.

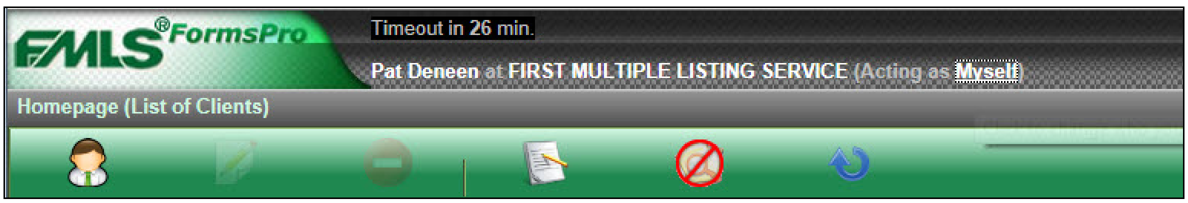
Until the impersonation is removed the "Impersonator" will be able to act-as the individual(s) designated in the 2nd column.

To remove the impersonation, follow steps 1-4 above. Then, simply **uncheck** the box for the designated agent on the right side of the screen. The impersonator will no longer to be able to manage forms for that individual.

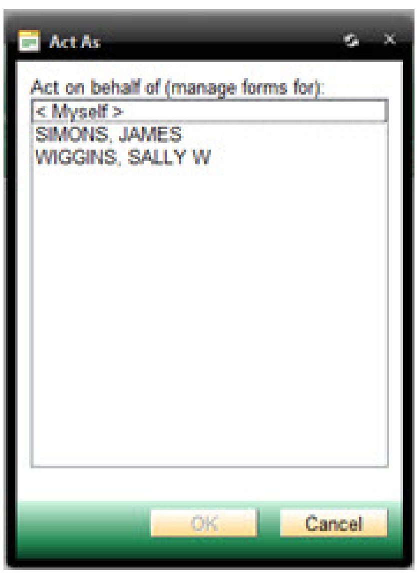
How the Impersonator Uses FormsPro

When the Impersonator logs in to FormsPro, he will use the following steps to manage forms for the designated user(s):

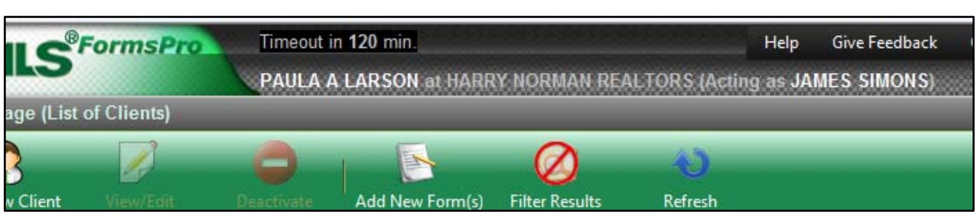
1. Click **Myself** on the menu bar.



2. The Act As dialog window opens. Click on the person to be impersonated.



3. Click **OK**. The screen changes to reflect the designated user and the Impersonator will have access to that user's transactions.



When the Impersonator has completed work for a designated agent, he should repeat the steps above, choosing **Myself** and clicking on **OK**. The Impersonator will not be able to view his own transactions until he is acting as "myself"!

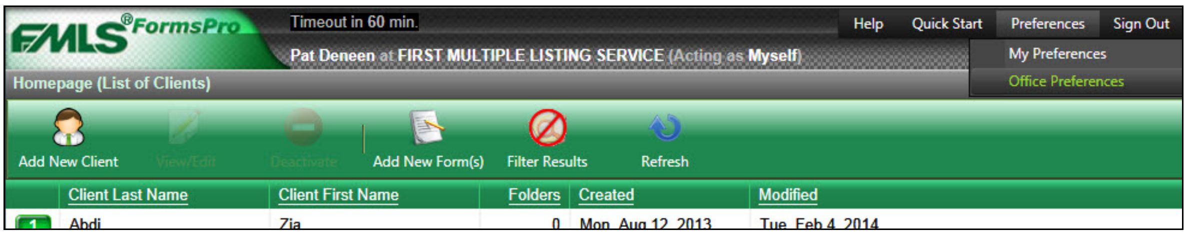
Uploading Office Forms

Use Office Forms to upload non-fillable PDF forms that are specific to your office. Once these forms are in place, office agents will have quick access to them!

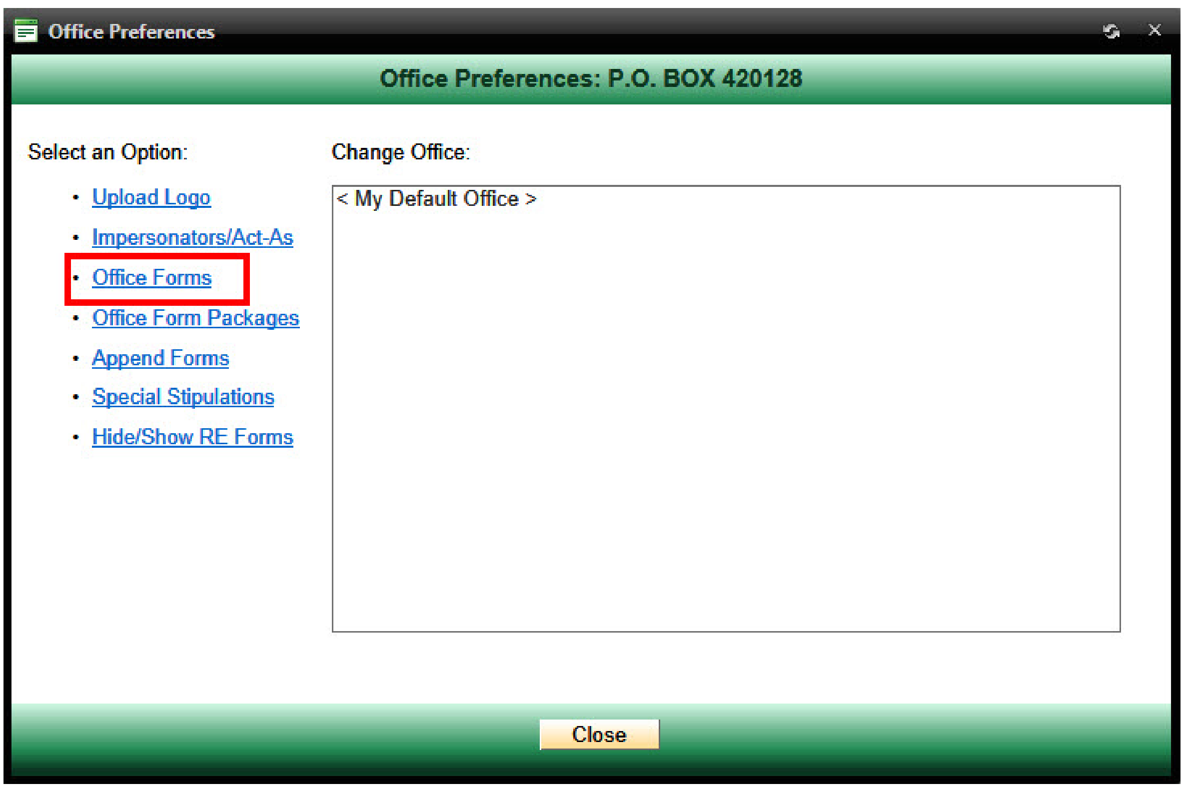
Forms uploaded to FormsPro may be no more than 4 MB in size.

To upload Office Forms:

1. Hover over **Preferences** on the main menu bar.
2. Click **Office Preferences**.

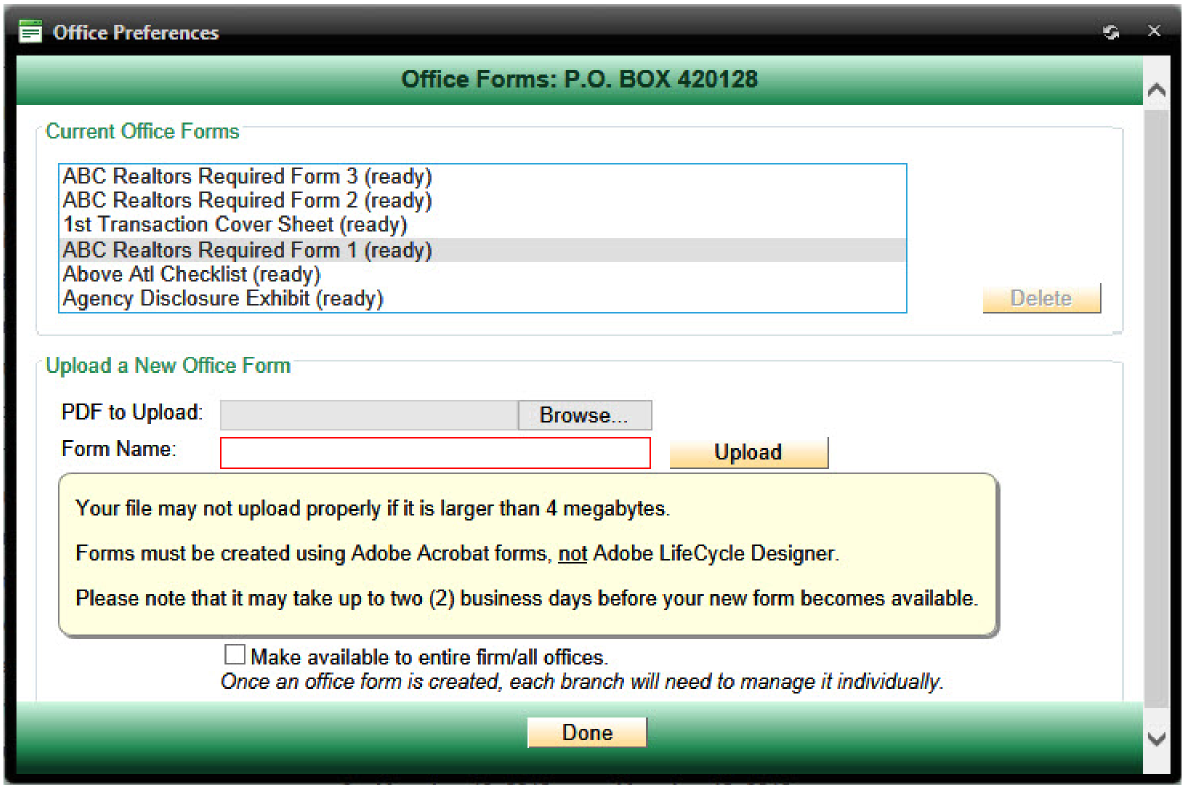


3. Click the **Office Forms** link.



4. Click the **Browse** button to locate the pdf file to be uploaded.
5. Type a name for the form in the box provided.
6. Click the **Upload** button.

7. The form appears in the list. Click **Done** to finish.



Delete an Office Form

To remove a form from the Office Forms list, simply click on the name of the form to highlight it, and then click the **Delete** button.

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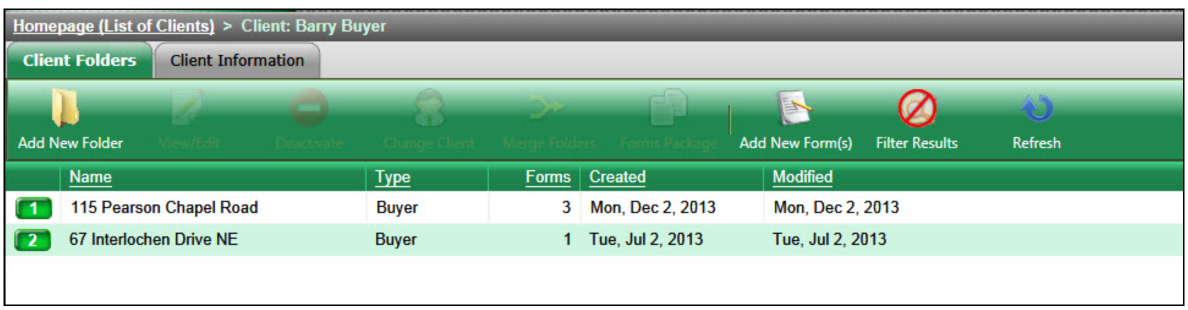
Creating/Modifying Office Forms Packages

The Forms Packages feature of FormsPro provides added flexibility for Brokers, and Office Staff by allowing them to collect a set of forms (GAR, FMLS and/or Office) as a template and save them together for fast and easy addition to clients' folders in FormsPro. Using this feature saves time! Brokers and Office Managers may make the Forms Packages available to an office or the entire firm.

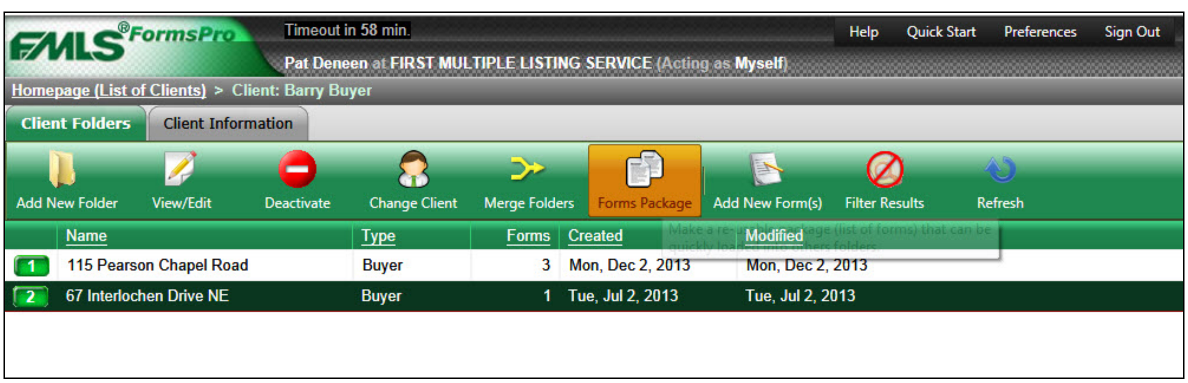
You can use an existing folder for a client (which already contains the forms to be included in the template) as the basis for the template, or a bogus folder may be created and used for the template, then deactivated when the template has been saved. Once saved, the template can be used repeatedly to quickly fill the folder of a new client with the contracts needed.

To create a Forms Package from an existing folder:

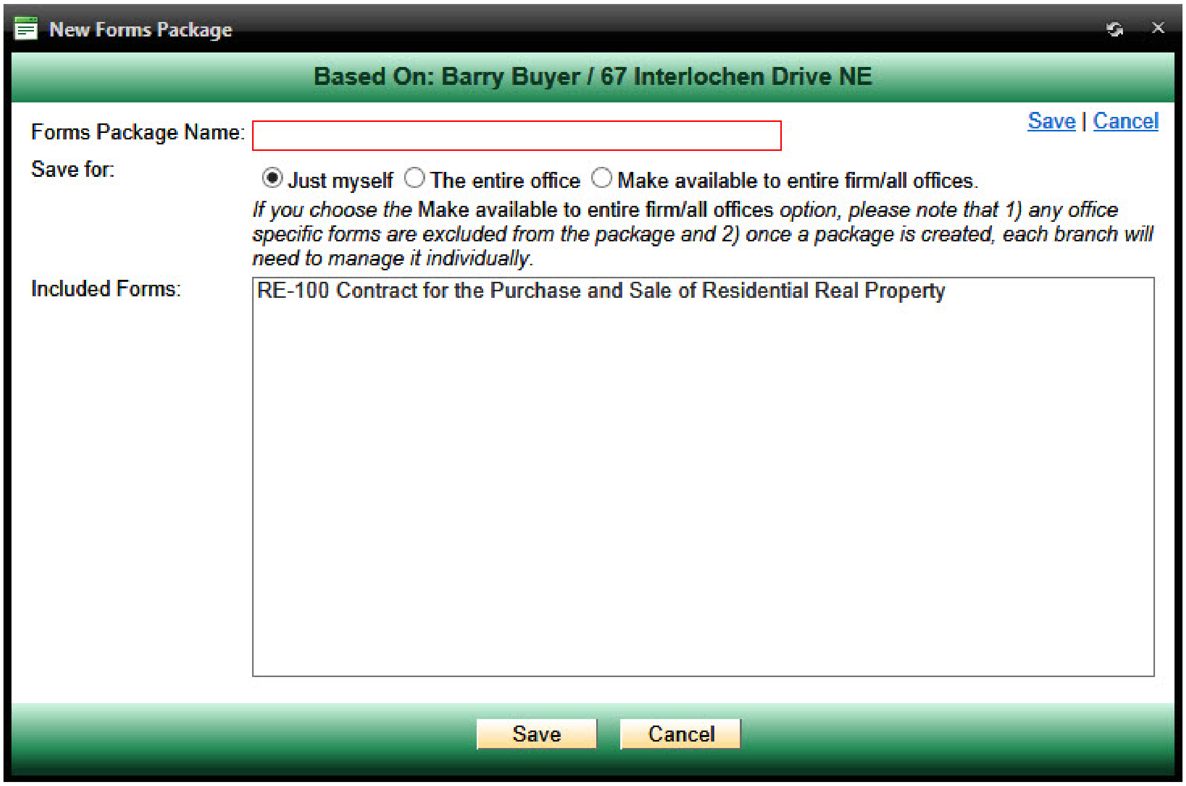
1. In the FormsPro client list, locate the client whose folder contents reflect what you wish the package to contain.
2. Double click on the client's name. The list of folders opens.
3. Click once to highlight the folder you want to serve as the base for a Forms Package.



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



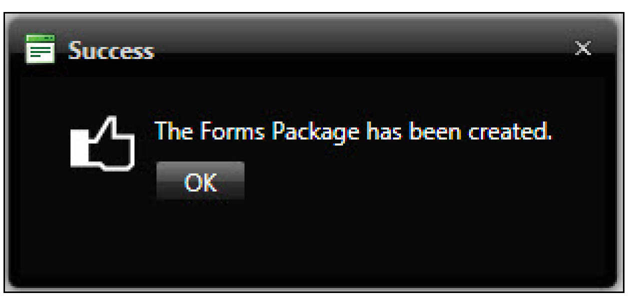
5. The New Forms Package window opens. Type a name for the Forms Package in the Forms Package Name field.



6. In the Save For field, click the appropriate button:

- Just Myself – only you will have access to this package
- The Entire Office – everyone in your office will have access; must have OM or BR access level
- Entire Firm/All offices – everyone in the form will have access; only the HB or the CO can assign to the whole firm.

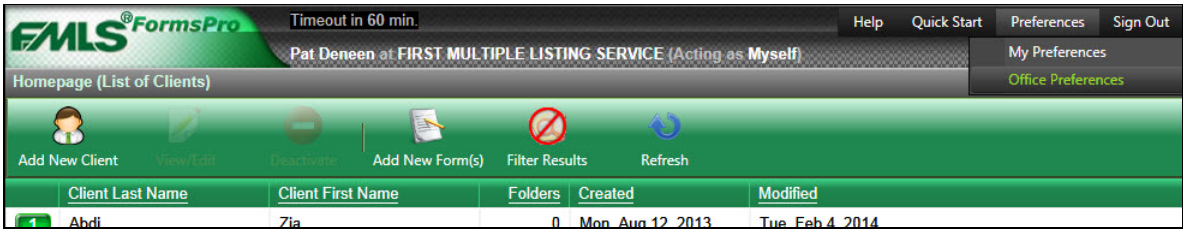
7. Click **Save**. A confirmation window appears.



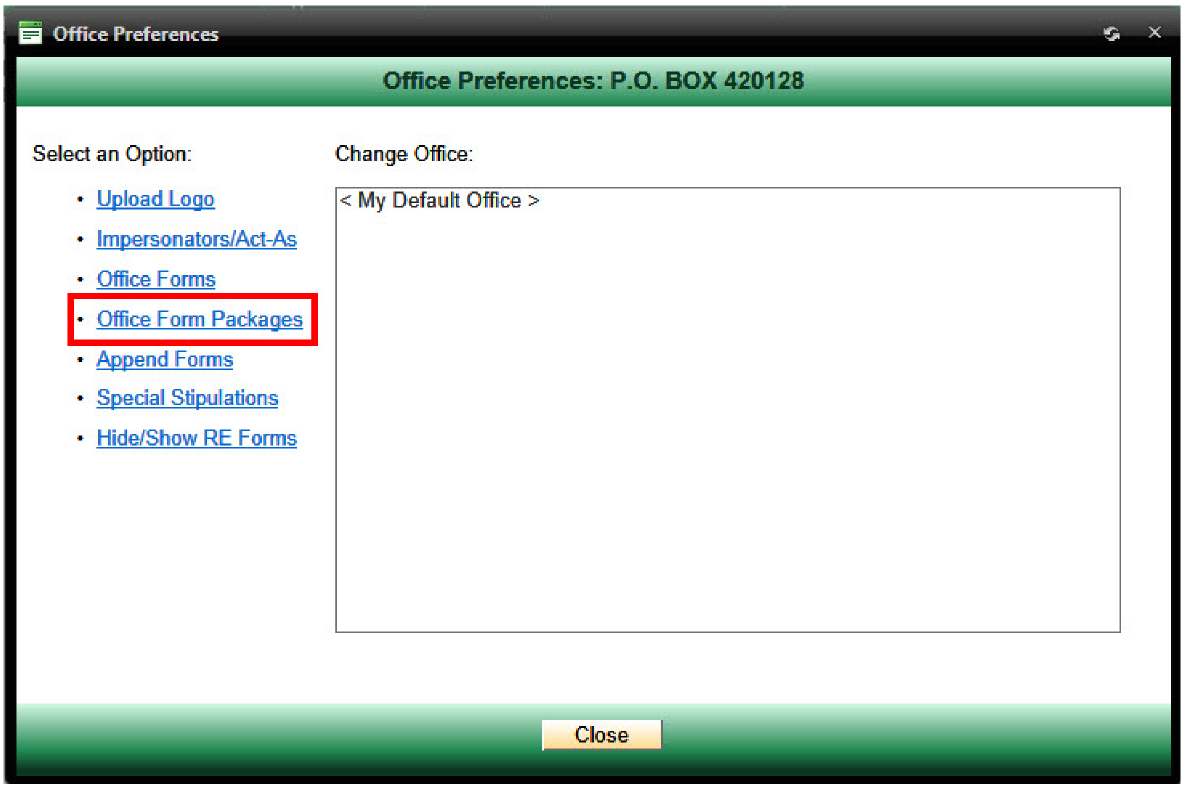
8. Click **OK** to continue.

Modify Office Forms Package

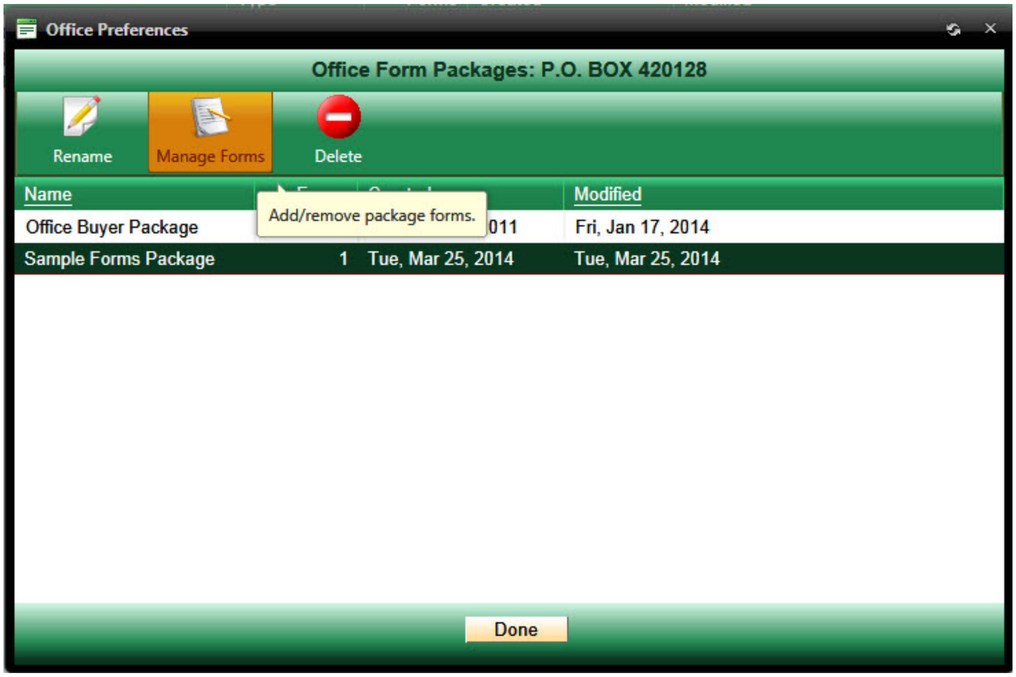
1. Hover over **Preferences** on the main menu bar.
2. Click **Office Preferences**.



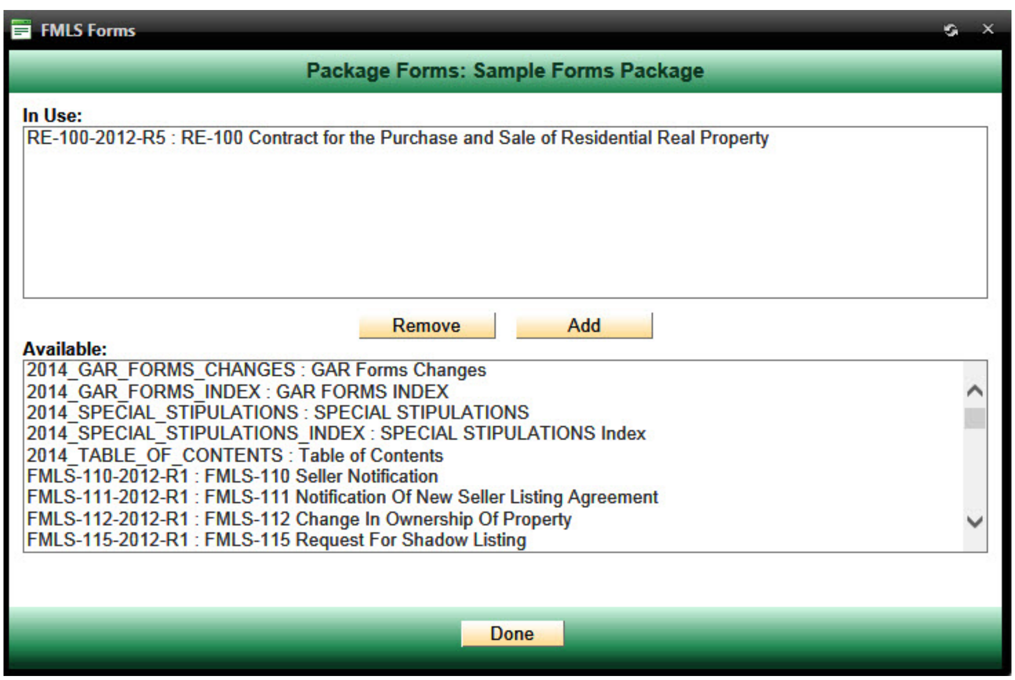
3. Click the **Office Forms Packages** link.



4. Click to highlight the forms package to modify.
5. Click the **Manage Forms** button.



6. The FMLS Forms window opens. To add forms to the package, click to select the form in the bottom box and click on the **Add** button.



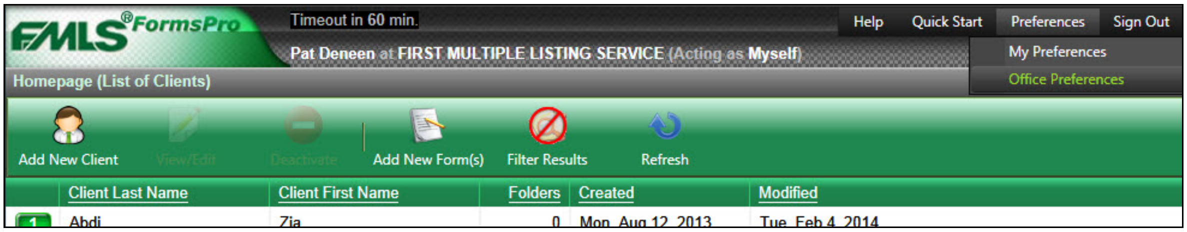
7. To remove forms from the package, locate the form in the top box and click the **Remove** button.

8. Click **Done** to finish.

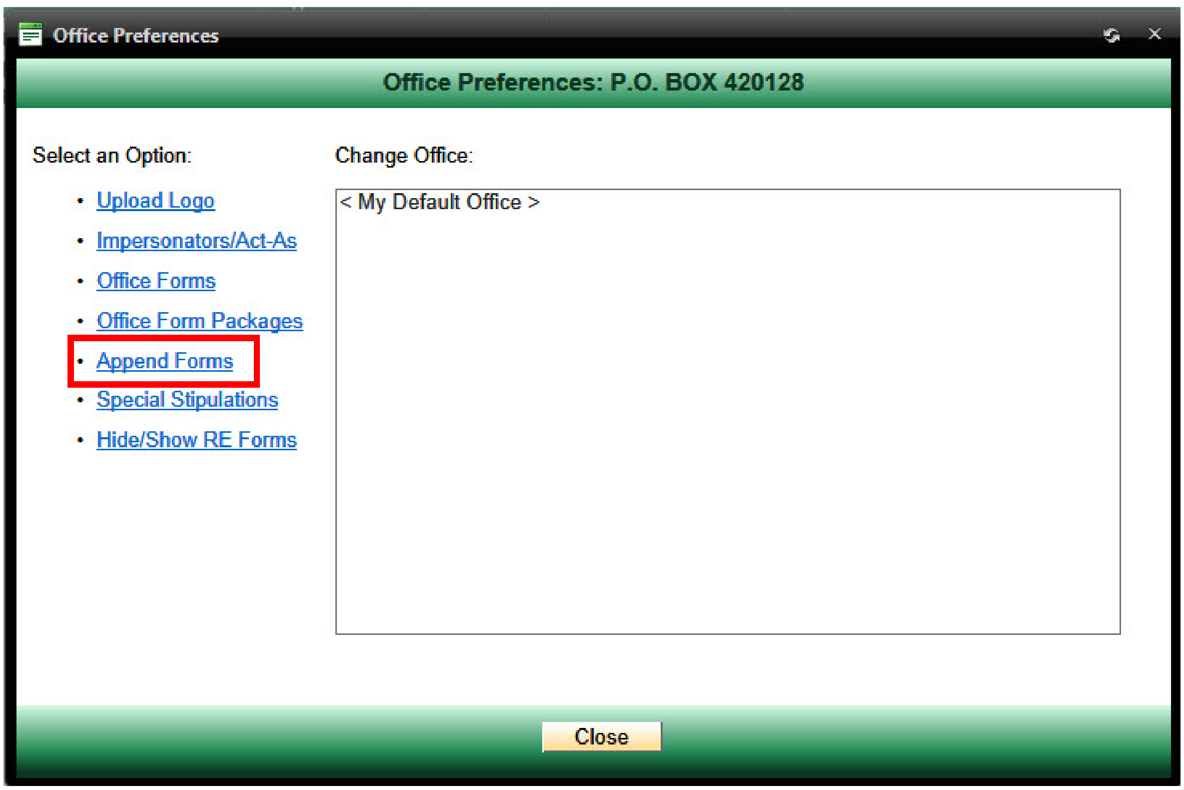
Append Forms

You can append (or join) two forms together, so that they always appear together. An example would be appending an Office or Broker Form to the Exclusive Seller Listing Agreement.

1. Hover over **Preferences** on the main menu bar.
2. Click **Office Preferences**.

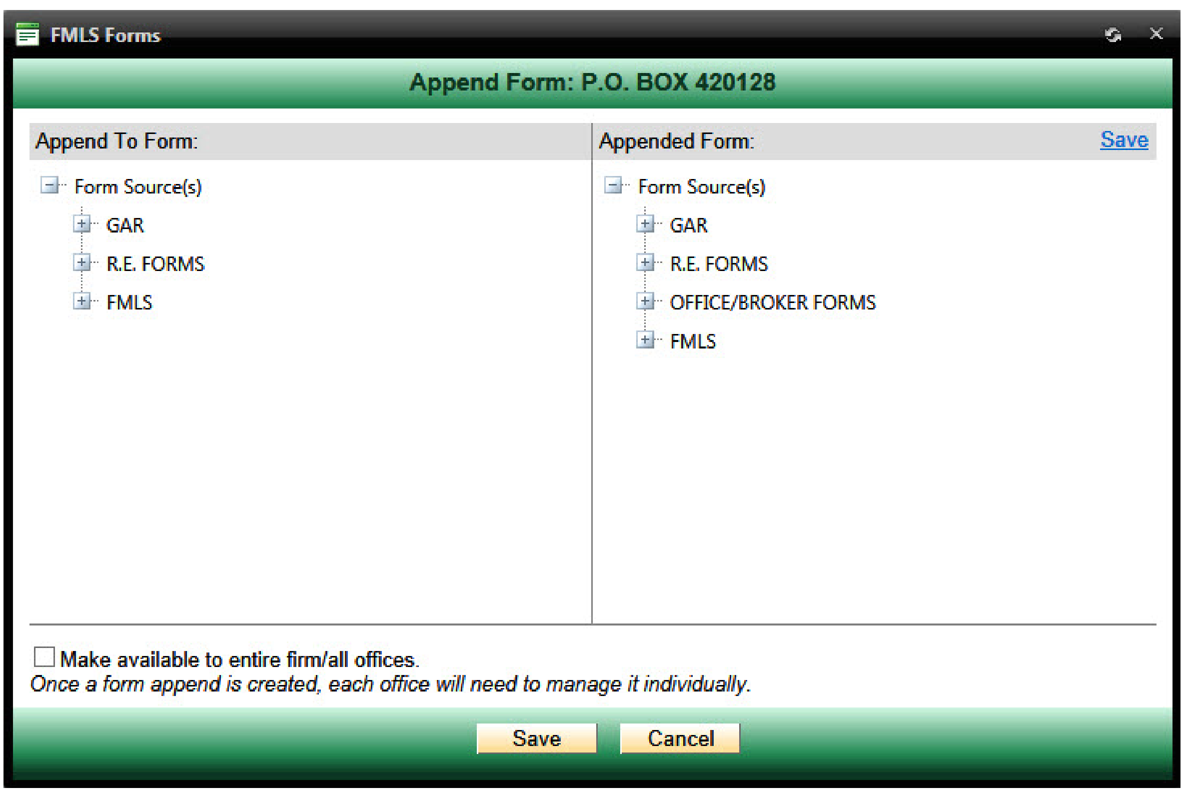


3. Click the **Office Forms Packages** link.

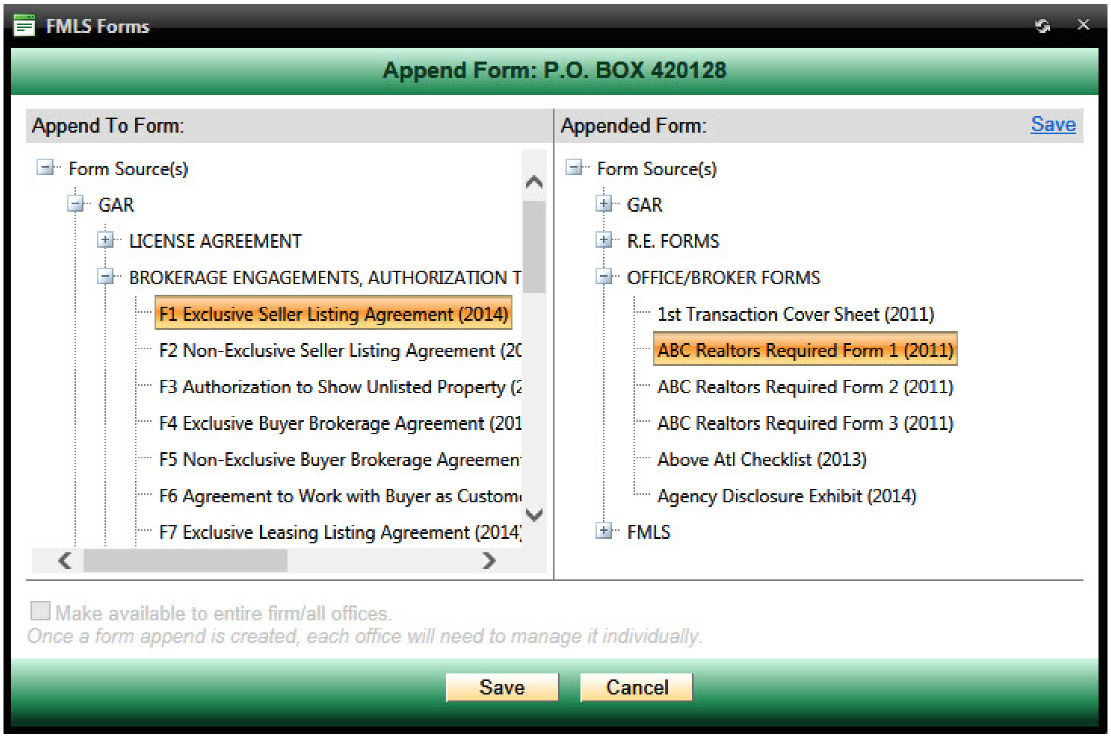


Click **Append Forms** link. The Append Forms window opens.

4. Click **New**. The Append Forms window appears with two columns: Append from and Append To



5. Select the forms by clicking the + sign and scrolling to view the form.
6. Click to select.



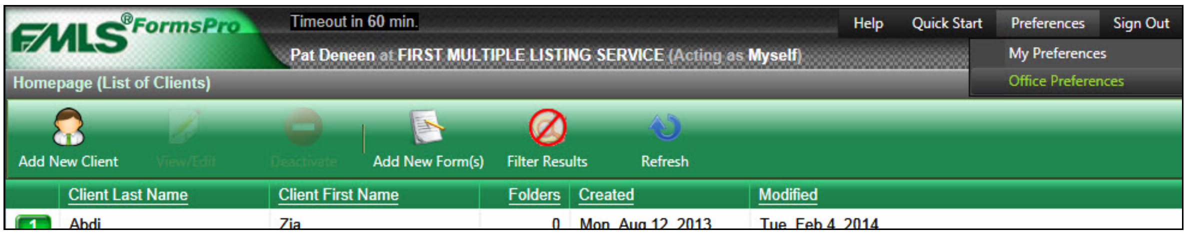
7. When you are done, click **Save**. The appended forms appear in the list.

Adding Office Special Stipulations

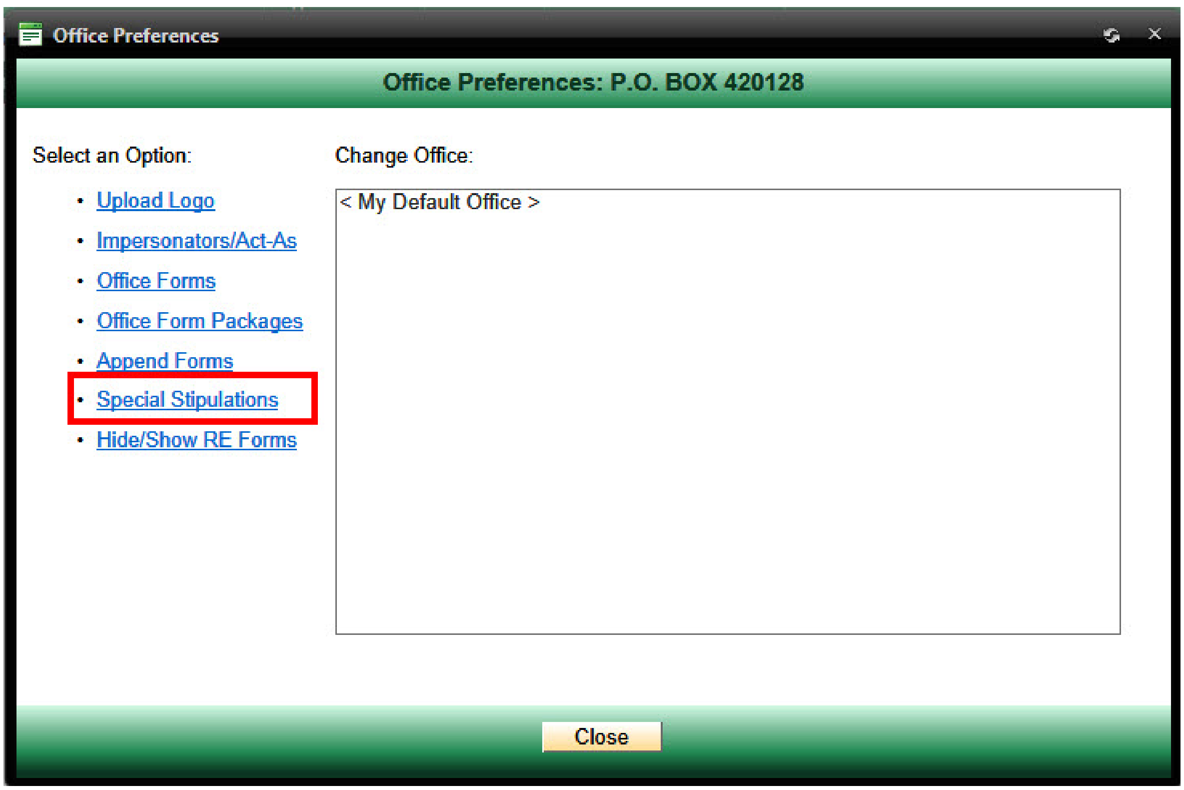
Your office or firm may have a set of special stipulations written specifically for circumstances that arise regularly. You can store these stipulations in FormsPro for your agents to use as needed.

To create Special Stipulations:

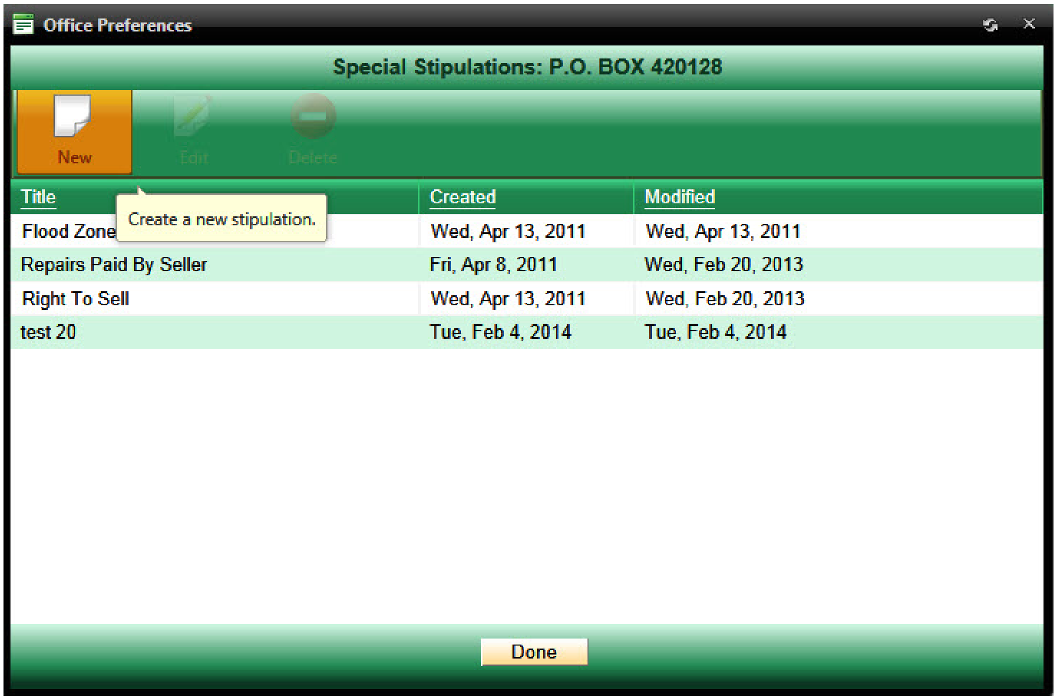
1. Hover over **Preferences** on the main menu bar.
2. Click **Office Preferences**.



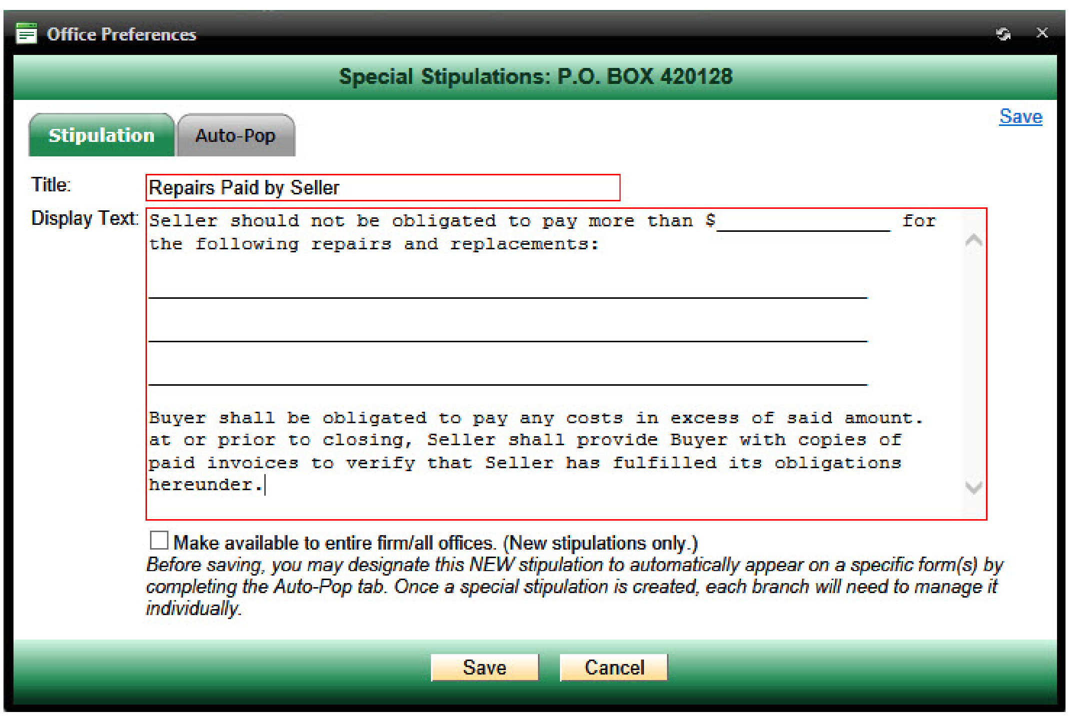
3. Click the **Special Stipulations** link.



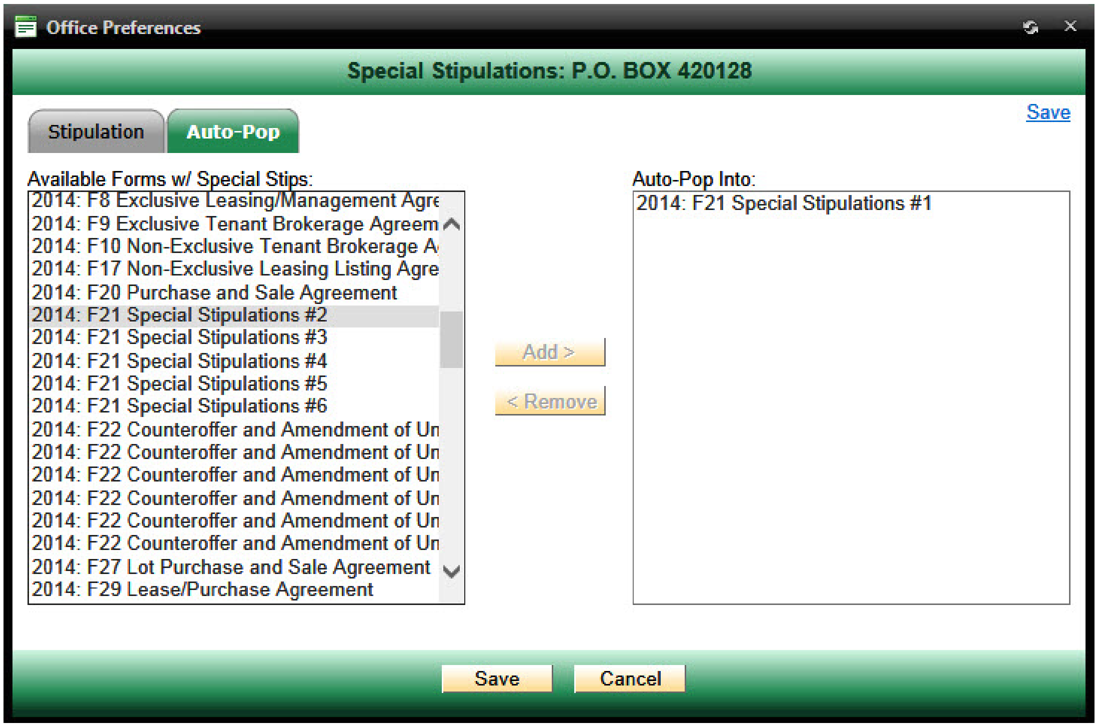
4. The Special Stipulations window opens. Click the **New** button to add a special stip.



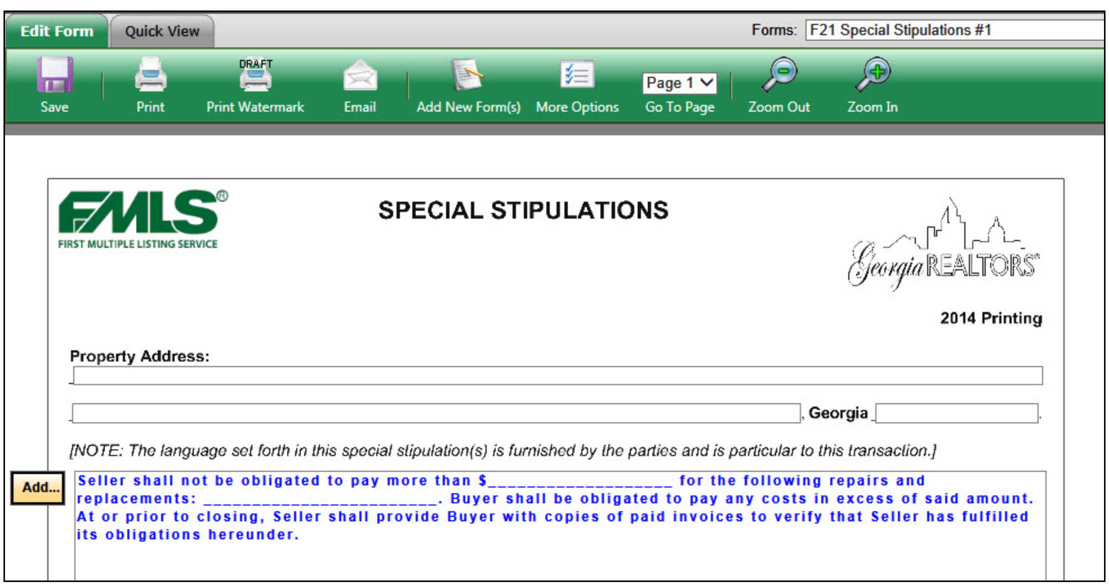
5. Type a name for the **Stipulation** in Title box.
6. Type the stipulation in the **Display Text** box. Special Stipulations may be copied from a text document and pasted directly into the Display Text box.



7. Indicate in the **Make Available** field, if you want this stipulation available to the entire firm.
8. If you would like this stipulation to appear in a specific form, click the **Auto-Pop** tab.



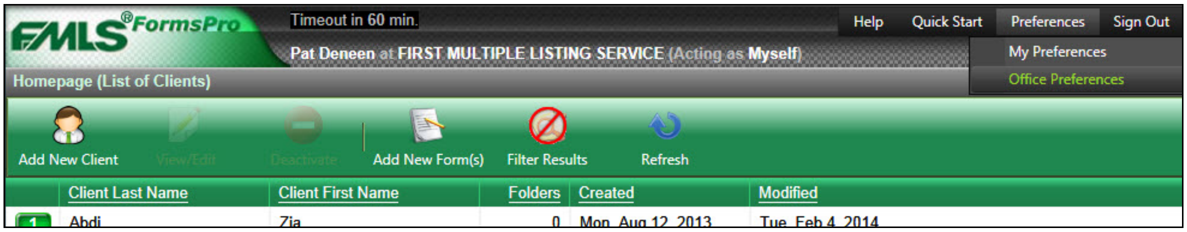
9. Find the form you want to insert the Special stipulation into, and click to place it in the Auto-Pop into column.
10. Click **Save** to finish. Your new text will be available in the form as shown below:



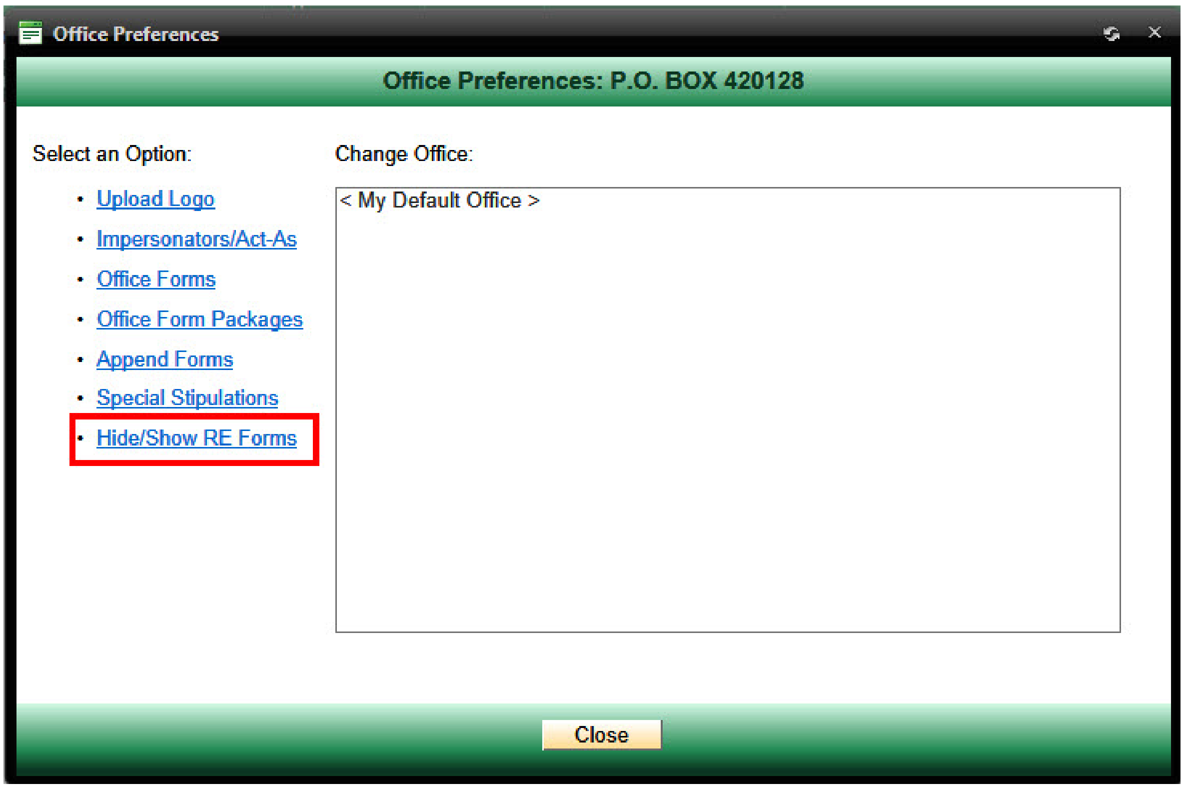
Hide/Show RE Forms

This option gives you the ability to hide the RE Forms for REALTOR offices. This option has no effect on any agent that is not a REALTOR and has not purchased the GAR forms (they will always see the RE Forms).

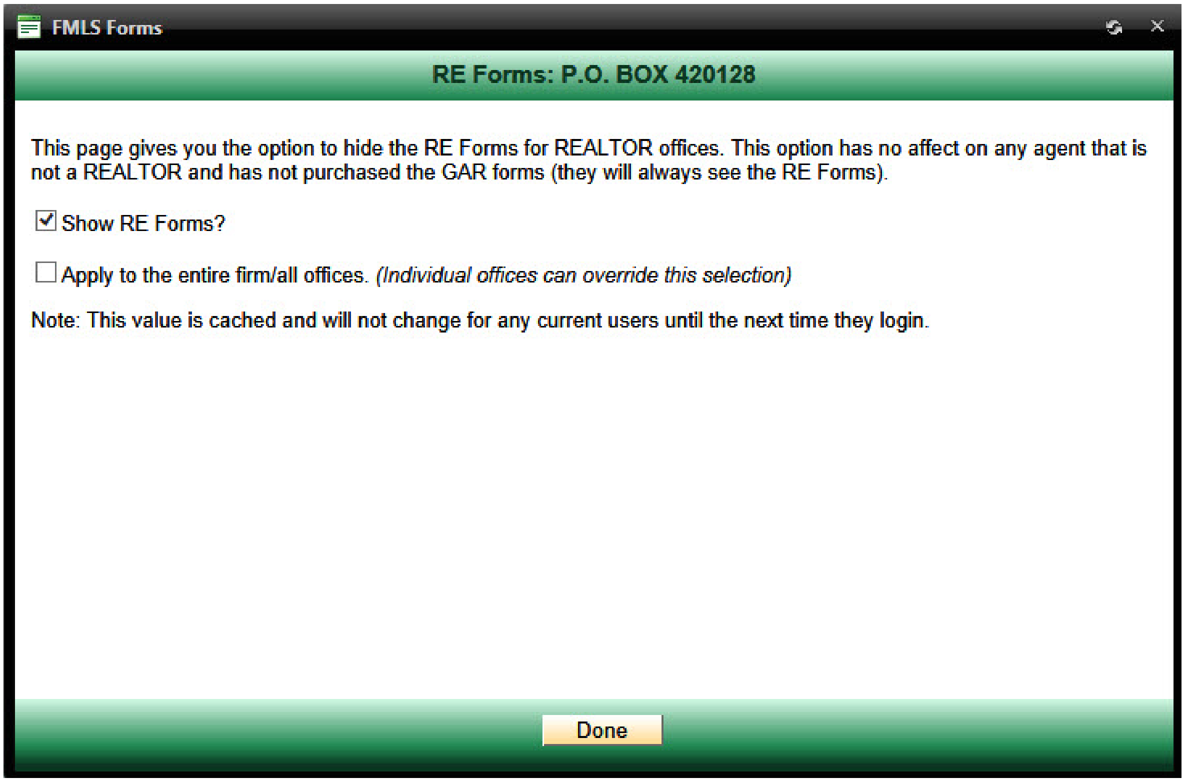
1. Hover over **Preferences** on the main menu bar.
2. Click on **Office Preferences**.



3. Click on the **Hide/Show RE Forms** link.



The Hide/Show RE Forms window opens.



4. Check or uncheck the box next to **Show RE Forms**.
5. Check or uncheck the box next to **Apply to the entire firm**.
6. Click **Done**.

Three Locations to Serve You:

FMLS Main Center
5457 Roswell Road
Atlanta, GA 30342
1800-505-FMLS

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

FMLS NW Center
166 Barrett Parkway, Ste. D
Marietta, GA 30066
678-290-9493