

Topics For Today's Webinar

FORM VALUES

INPUT BUTTON

ELECTRONIC SIGNATURE (*WHAT
THE CLIENT SEES*)

DOCUMENT PACKET

PLUS

LISTING AND SALES LIST OF
WHAT NEEDS TO BE IN APP
FILES

Gina Bannan

gbannan@alliancegroupfl.com

Karen Cox

kcox@alliancegroupfl.com



Forms Values



My Default Values: AS IS Residential Contract For Sale And Purch... ⌵

displaying: 1 - 5 of 12 Pages: 1-5 6-10 11-12

"AS IS" Residential Contract For Sale And Purchase
THIS FORM HAS BEEN APPROVED BY THE FLORIDA REALTORS AND THE FLORIDA BAR

1* **PARTIES:** _____ ("Seller"),
2* and _____ ("Buyer"),
3 agree that Seller shall sell and Buyer shall buy the following described Real Property and Personal Property
4 (collectively "Property") pursuant to the terms and conditions of this AS IS Residential Contract For Sale And Purchase
5 and any riders and addenda ("Contract"):
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7* **1. PROPERTY DESCRIPTION:**
8* (a) Street address, city, zip: _____
9* (b) Located in: _____ County, Florida. Property Tax ID #: _____
10 (c) Real Property: The legal description is _____
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571 * **20. ADDITIONAL TERMS:**
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1. When you are on the home page of your account, on the top left corner you will see the Form Values option.
2. When you click on the form values link it will open the "My Default Values" and you can click on the drop down arrow to the right of the form name that appears in the list and scroll through the forms library and look for the form you would like to prefill with your information. The information you type here will be info that doesn't change per deal.
3. You can type in verbiage that you would like to use every time you use the form.
4. If you type In your Broker's Name and your name on the form, it will be on there every time you add the form to a file.

Importing from a *Form*



Select destination where the FORM data will be applied.
You can choose another FORM or a FILE INFO SECTION.

- **To Fill in a Form:** Start from within your appFile by adding or opening a form (i.e. Sales Contract).

- **To Fill in a file Info Section:** Start from within your appFile by adding or editing a File Info Section.

1. Locate and click on the "IMPORT VALUES" button.

2. Choose "IMPORT from a Form."

3. Select the FORM source that contains the data values from the list provided.
Click on "Choose" to continue.

****NOTE:** If the FORM resides in another appFile, clear the source appFile field to SEARCH.

4. Evaluate the data presented. Next, click on "START IMPORT" button to apply the values.

5. Choose "Done" or "Perform Another Import Action".

The screenshots illustrate the following steps:

- Step 1:** In the 'General Paperwork' section, the 'AS IS Residential Contract For Sale And Purchase' form is selected. The 'Import Values' button is highlighted.
- Step 2:** The 'Import Types' dialog is shown. The 'Import from a Form' option is selected.
- Step 3:** The 'Source appFile' is set to 'Buyer File'. Under 'Select Form:', the 'F128 - Exclusive Lease Management Agreement' is chosen from the list.
- Step 4:** The 'Start Import' button is clicked to apply the data.
- Step 5:** The final screen shows the 'Perform Another Import' and 'Done' buttons.

Importing from Info Fields



Select destination where the INFO FIELDS data will be applied.
You can choose another FORM or a FILE INFO SECTION.

- **To Fill in a Form:** Start from within your appFile by adding or opening a form (i.e. Sales Contract).

- **To Fill in a file Info Section:** Start from within your appFile by adding or editing a File Info Section.

The screenshots illustrate the following steps:

- Locate and click on the "IMPORT VALUES" button.
- Choose "IMPORT from Info Fields."
- Select the INFO FIELDS source that contains the data values from the list provided. Click on "Choose" to continue.
- Evaluate the data presented. Next, click on "START IMPORT" button to apply the values.
- Choose "Done" or "Perform Another Import Action".

1. Locate and click on the "IMPORT VALUES" button.

2. Choose "IMPORT from Info Fields."

3. Select the INFO FIELDS source that contains the data values from the list provided. Click on "Choose" to continue.

****NOTE:** If the INFO FIELDS reside in another appFile, clear the source appFile field to **SEARCH**.

4. Evaluate the data presented. Next, click on "START IMPORT" button to apply the values.

5. Choose "Done" or "Perform Another Import Action".

Importing from the MLS



Select destination where the MLS data will be applied.
You can choose a **FORM** or a **FILE INFO SECTION**.

- **To Fill in a Form:** Start from within your appFile by adding or opening a form (i.e. Sales Contract).
- **To Fill in a file Info Section:** Start from within your appFile by adding or editing a File Info Section.

1. Locate and click on the "IMPORT VALUES" button.
2. Choose "IMPORT from MLS"
3. Enter your MLS Number and select "SEARCH".
4. Apply the result by clicking on the "CHOOSE" button.
5. Evaluate the data presented. Next, click on "START IMPORT" button to apply the values.
6. Choose "Done" or "Perform Another Import Action".

Electronic Signature Link to Help Your Client



1. Go to the document you sent .
2. Click Signature Request.
3. Active Signature Request tab scroll to very bottom.
4. Click the link at the very bottom in BLUE.



Document Packets



- **Bundle documents** related to specific aspects of the transaction (e.g., closing, title search, or mortgage approval) into a **packet**. This helps organize everything related to a particular stage of the transaction in one easy-to-access file.
- You can create packets for **buyers, sellers, title companies, and lenders** so that all parties have access to the exact set of documents they need. Closing packets and post packets are an example for clients.





What Is Needed In App File

Updated Lists As Of July 2025 for Listing & Sales

LISTING FILES

- What should be in your listing files
- Fully executed listing contract
- Public record showing ownership
- All owners sign listing
- Proof fully executed listing provided seller signed by broker or authorized agent
- Definite expiration date
- Proof all offers presented

SALES FILES

- What should be in your sales files
- Fully executed contract
- All pages of contract
- Escrow verification letter
- Proof you provided inspection reports and termite reports to buyer
- Proof of disclosing all known facts that materially affect the value of residential real property and are not readily observable to the buyer
- Proof deposits timely made in compliance with contract terms