### **Topics For Today's Webinar**

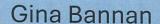
FORM VALUES INPUT BUTTON

ELECTRONIC SIGNATURE (WHAT THE CLIENT SEES)

**DOCUMENT PACKET** 

**PLUS** 

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



gbannan@alliancegroupfl.com

Karen Cox

kcox@alliancegroupfl.com



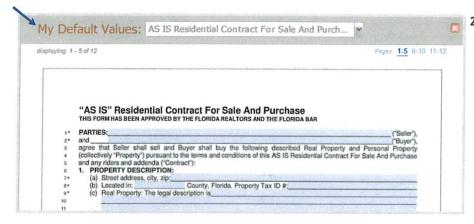




#### **Forms Values**

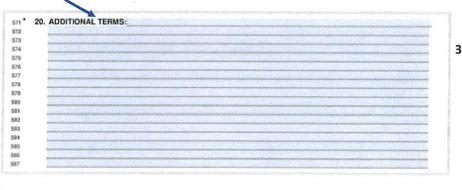






1. When you are on the home page of your account, on the top left corner you will see the Form Values option.

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.



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 From



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



Actions ~

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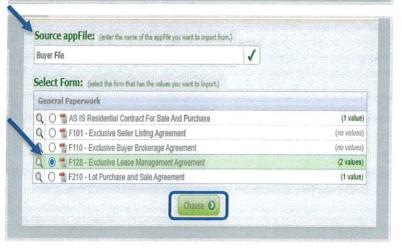
Submit -

1 Import Values

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



2. Choose "IMPORT from a Form."



- Select the <u>FORM source</u> 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.
- Choose "Done" or "Perform Another Import Action".

#### **Importing from Info Fields**



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



· Lock

Import Values

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

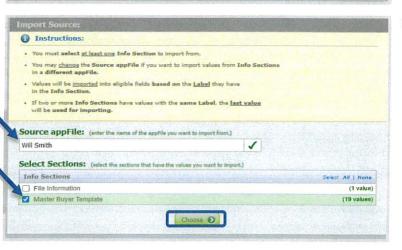


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2. Choose "IMPORT from Info Fields."



- Select the <u>INFO FIELDS source</u> 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.
- Choose "Done" or "Perform Another Import Action".

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help close

#### **Importing from the MLS**



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



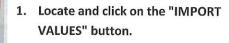
Actions ~

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Submit ▼

Import Values

- 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.

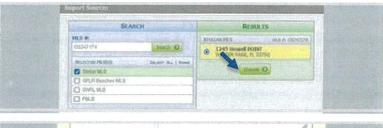




2. Choose "IMPORT from MLS"



Enter your MLS Number and select "SEARCH".



4. Apply the result by clicking on the "CHOOSE" button.



- Evaluate the data presented. Next, click on "START IMPORT" button to apply the values.
- Choose "Done" or "Perform Another Import Action".

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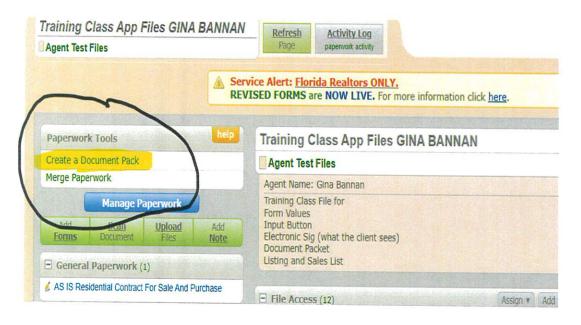
## Electronic Signature Link to Help Your Client



- 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