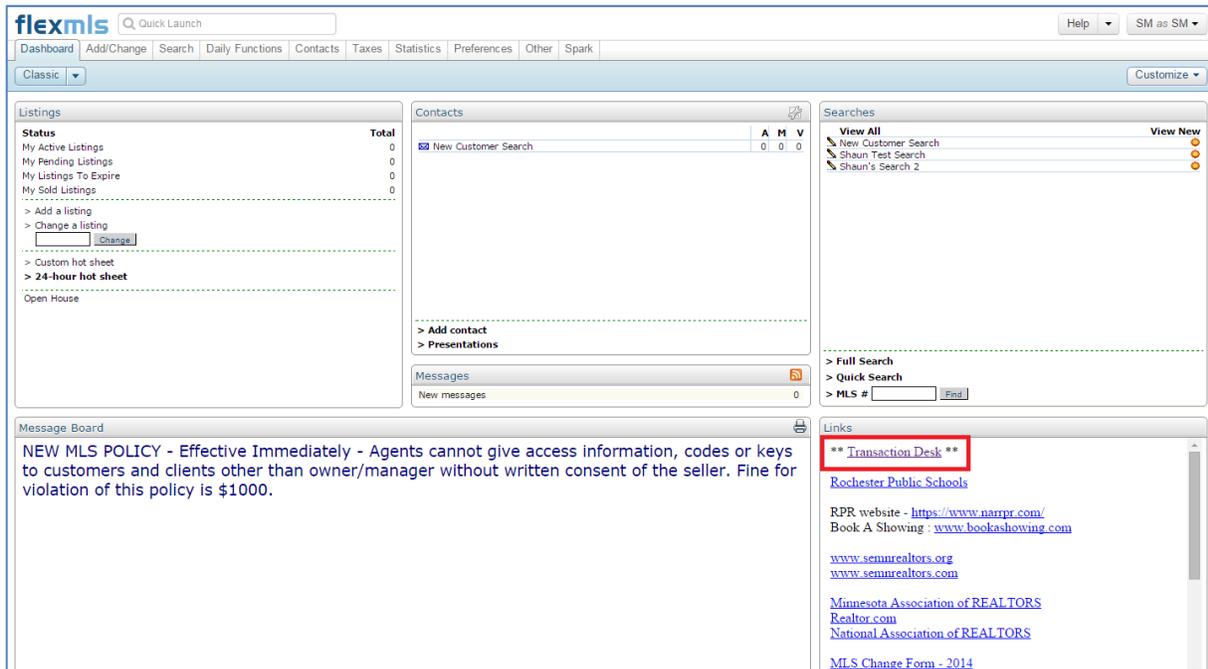


TRANSACTION DESK – USING FORMS

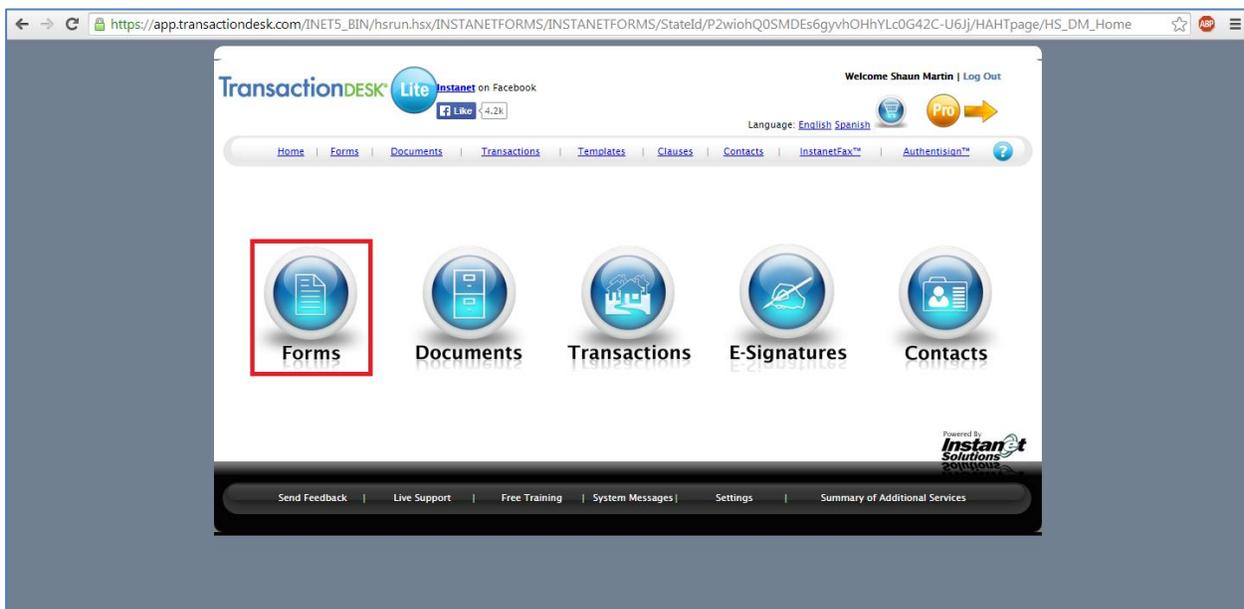
Go to www.flexmls.com and sign-in.

On the Dashboard screen, click on **'Transaction Desk'** as highlighted below:



The screenshot shows the flexmls dashboard with several sections: Listings, Contacts, Searches, and a Message Board. In the bottom right corner, under the 'Links' section, the text **** Transaction Desk **** is highlighted with a red rectangular box. Other links include Rochester Public Schools, RPR website, Book A Showing, SEMNRealtors.org, Minnesota Association of REALTORS, National Association of REALTORS, and MLS Change Form - 2014.

Click on **'Forms'** icon as highlighted below:



The screenshot shows the TransactionDESK Lite interface. At the top, it says 'Welcome Shaun Martin | Log Out' and 'Language: English Spanish'. Below the navigation bar, there are five main icons: Forms, Documents, Transactions, E-Signatures, and Contacts. The 'Forms' icon, which depicts a document with a pencil, is highlighted with a red rectangular box. The footer includes links for Send Feedback, Live Support, Free Training, System Messages, Settings, and Summary of Additional Services.

SEARCHING FORMS

This will open up a list of Forms complete with search functionality.

Click in **'Search for Forms'** as highlighted above and enter the name of form you are looking for. For example, enter **'MLS Change Form'** and click on the magnifying glass to perform a search as highlighted below:



This returns **'SEMAR – MLS Change Form'** as highlighted below:



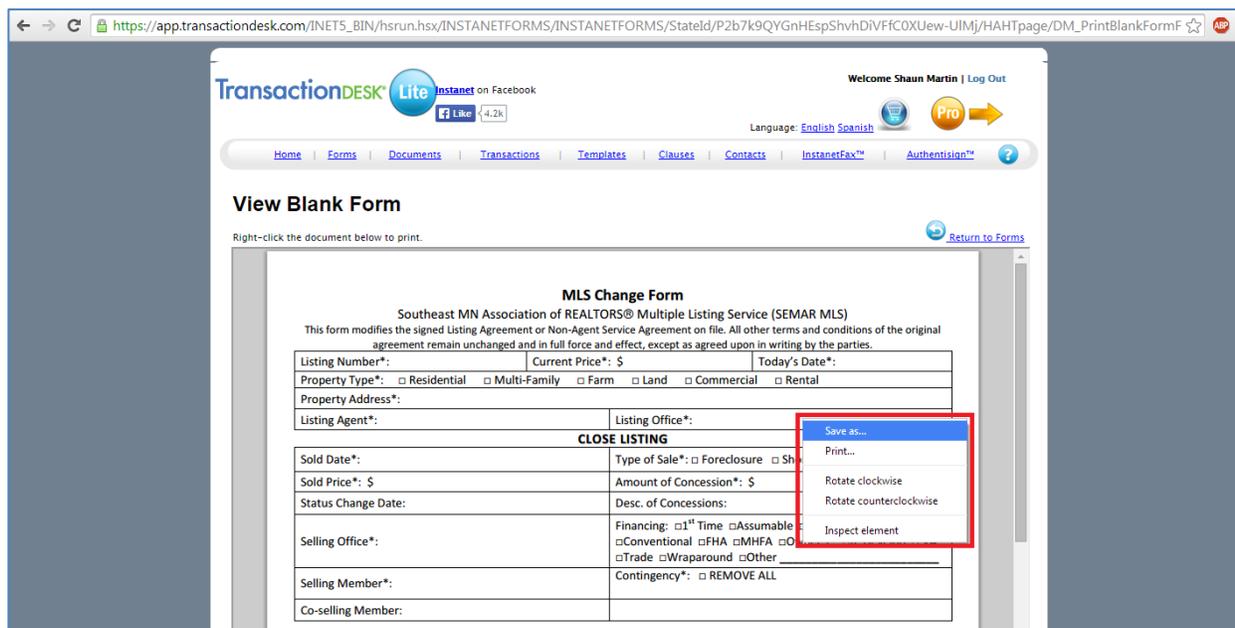
Click on the **'Print Blank'** icon as highlighted below:



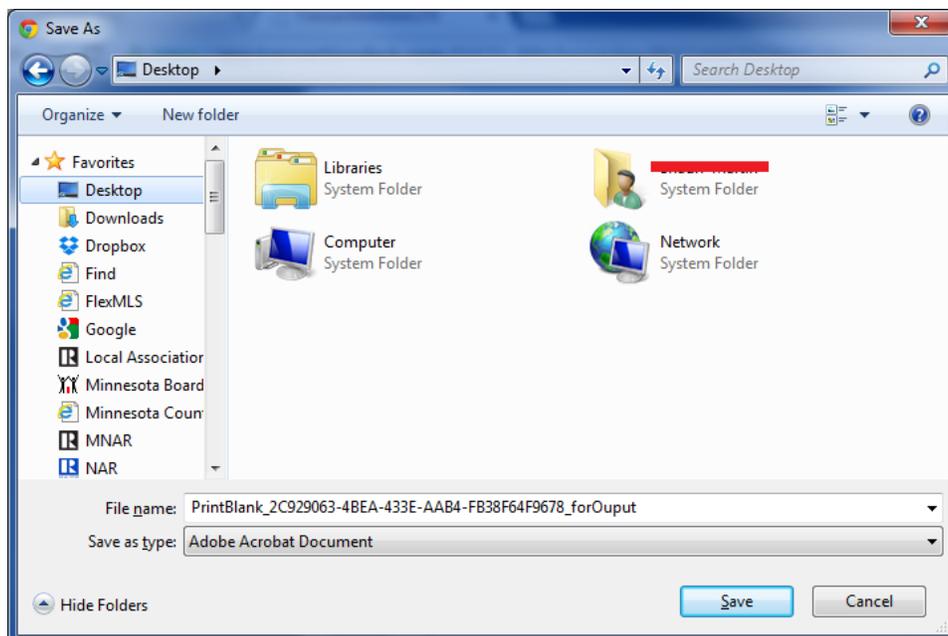
SAVING FORMS

In the blank form below, use your mouse and right click on the form.

You will see the box appear on screen as highlighted below. Click on **'Save As'**

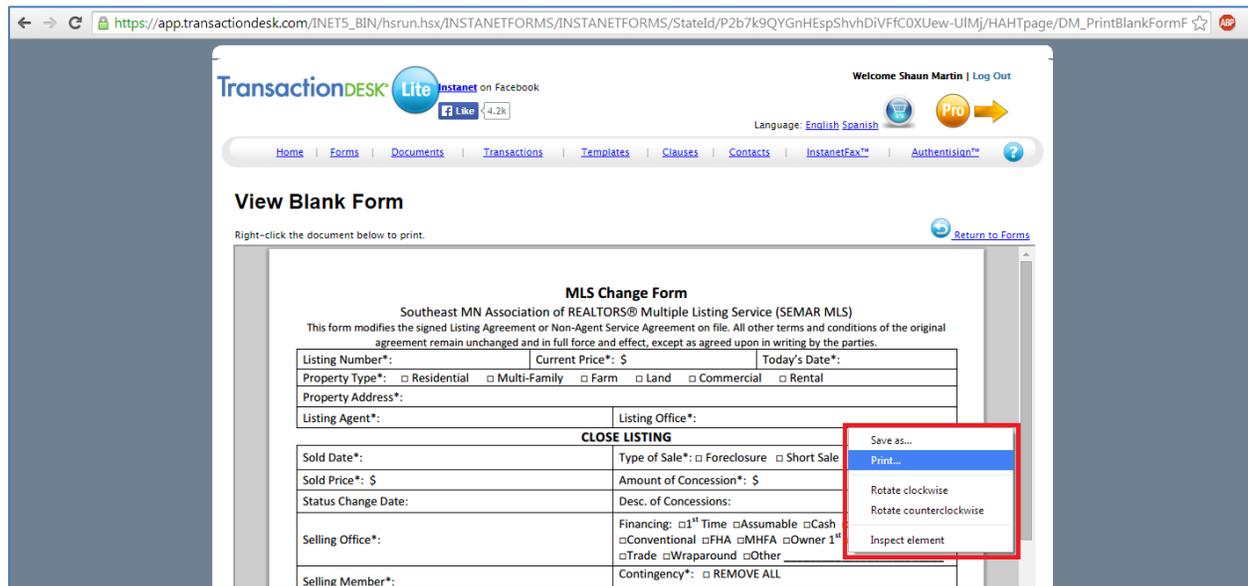


Choose where you want to save the file, i.e. the folder you desire and click the 'Save' button highlighted below to complete the save. By following the **'Saving Forms'** steps you guarantee that you have the most up-to-date documents



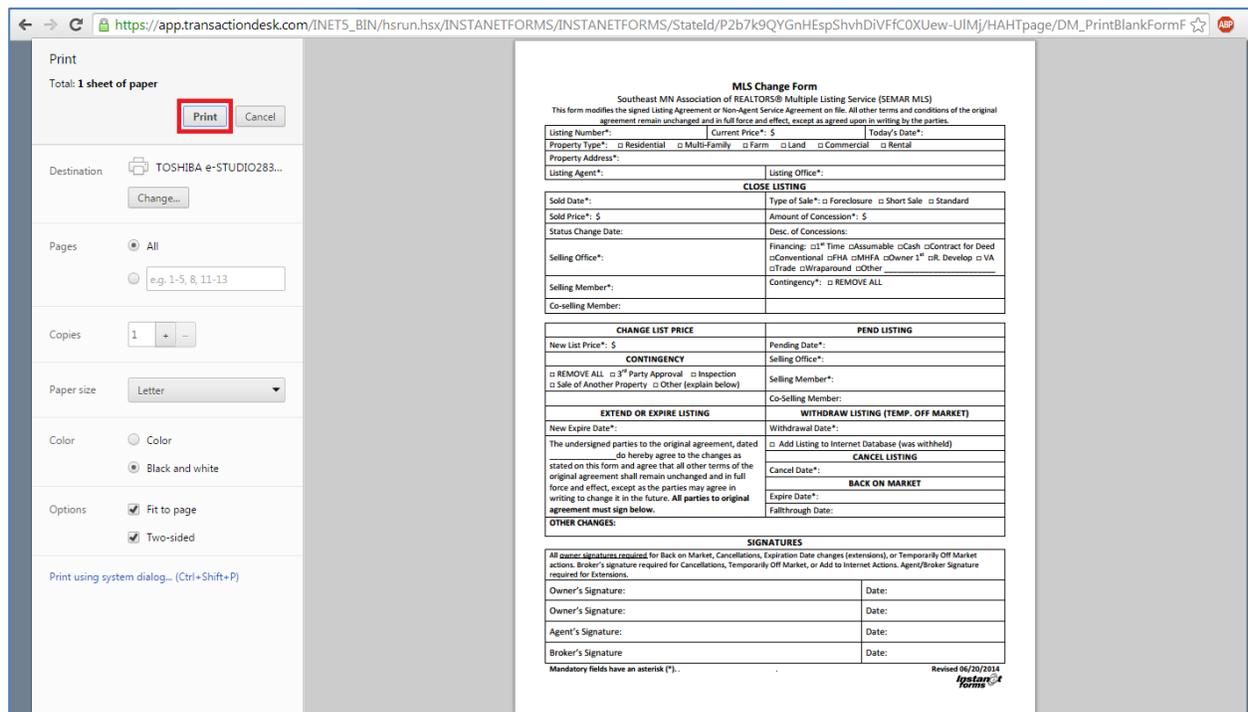
PRINTING FORMS

The other option that is important for 'Blank Forms' is the print option. As before, right click on the blank form and select 'Print'



The screenshot shows the TransactionDESK interface. The main content area displays the 'MLS Change Form' with various fields for listing details. A right-click context menu is visible over the form, with the 'Print...' option highlighted in blue. Other options in the menu include 'Save as...', 'Rotate clockwise', 'Rotate counterclockwise', and 'Inspect element'.

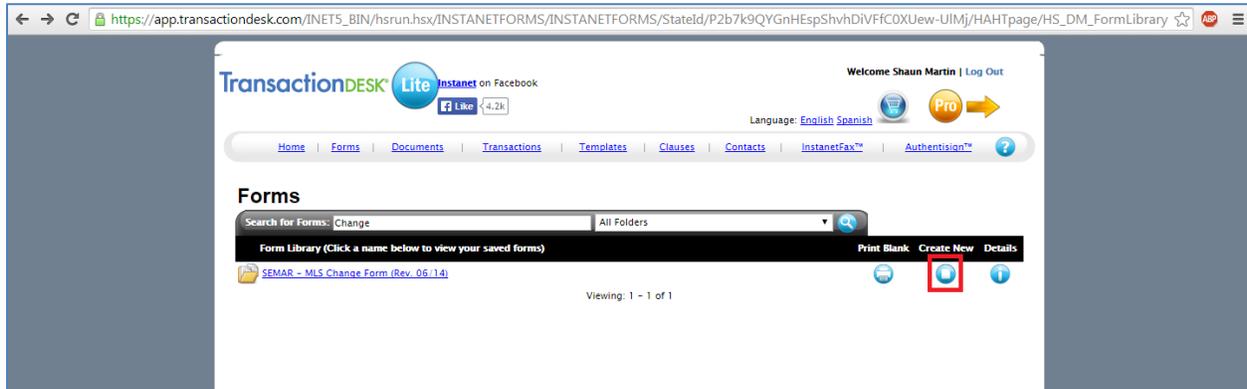
This will open the 'Print' view, simply select your preferred options and when you are ready select the 'Print' button as highlighted below:



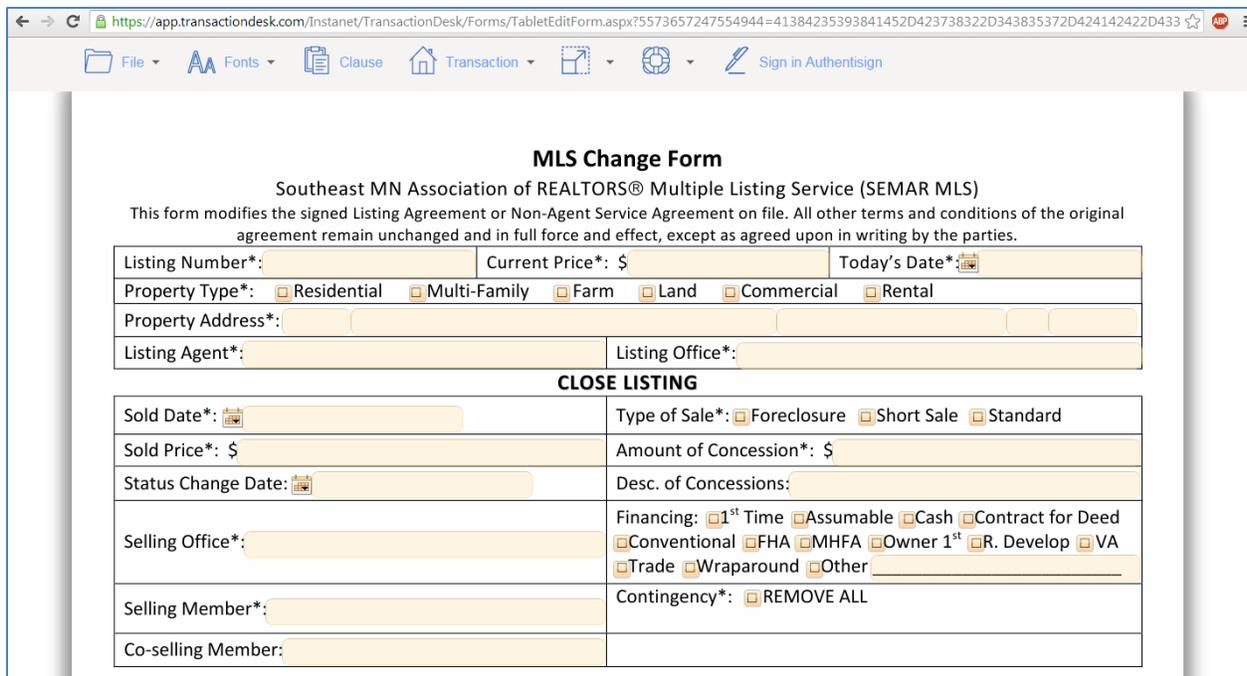
The screenshot shows the 'Print' dialog box. The 'Print' button is highlighted with a red box. The dialog box includes options for destination (TOSHIBA e-STUDIO283...), pages (All), copies (1), paper size (Letter), color (Black and white), and options (Fit to page, Two-sided). The 'Print' button is highlighted with a red box.

CREATE NEW FORM

Click on the 'Create New' icon as highlighted below:



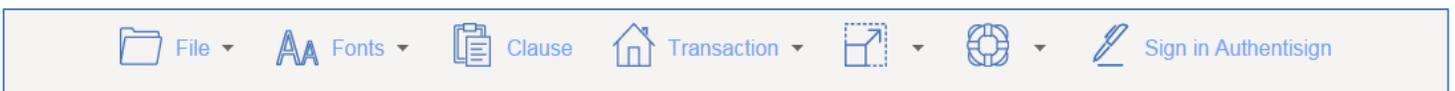
This feature, allows the user to open up a fillable form and enter information directly apart from the signatures section.



The screenshot shows the 'MLS Change Form' form. The form is titled 'MLS Change Form' and is for the Southeast MN Association of REALTORS® Multiple Listing Service (SEMAR MLS). It contains various fields for listing information, property type, address, agent, and listing details. The form is divided into sections for listing information and closing details.

MLS Change Form	
Southeast MN Association of REALTORS® Multiple Listing Service (SEMAR MLS)	
This form modifies the signed Listing Agreement or Non-Agent Service Agreement on file. All other terms and conditions of the original agreement remain unchanged and in full force and effect, except as agreed upon in writing by the parties.	
Listing Number*:	Current Price*: \$
Property Type*:	Today's Date*:
<input type="checkbox"/> Residential <input type="checkbox"/> Multi-Family <input type="checkbox"/> Farm <input type="checkbox"/> Land <input type="checkbox"/> Commercial <input type="checkbox"/> Rental	
Property Address*:	
Listing Agent*:	Listing Office*:
CLOSE LISTING	
Sold Date*:	Type of Sale*:
Sold Price*: \$	Amount of Concession*: \$
Status Change Date:	Desc. of Concessions:
Selling Office*:	Financing:
Selling Member*:	<input type="checkbox"/> 1 st Time <input type="checkbox"/> Assumable <input type="checkbox"/> Cash <input type="checkbox"/> Contract for Deed <input type="checkbox"/> Conventional <input type="checkbox"/> FHA <input type="checkbox"/> MHFA <input type="checkbox"/> Owner 1 st <input type="checkbox"/> R. Develop <input type="checkbox"/> VA <input type="checkbox"/> Trade <input type="checkbox"/> Wraparound <input type="checkbox"/> Other
Co-selling Member:	Contingency*:
	<input type="checkbox"/> REMOVE ALL

At the top of the 'Create New' feature you will see a number of icons



FILE

I have provided a visual of the list of options available under the 'File' icon, many of which are self explanatory.

 New	New Option – Create a new form.
 Open Form	Open Form Option – Select a form to use.
 Save	Save Form Option – Saves your form input.
 Save as PDF	Save as PDF Form Option – Saves your form as a PDF.
 Copy	Copy Form Option – Allows you to create a copy of the form.
 Clear	Clear Form Option – Allows two options to clear current page or all pages.
 Watermark	Watermark Option – Allows three options: Confidential; Draft or Remove Watermark.
 Delete	Delete Form Option – Deletes the form.
 Print	Print Form Option – Prints the form.
 Send	Send Form Option – Allows four options: Email; Fax; Send to DocBox; Sign in Authentisign
 Exit	Exit Form Option – Closes the form.

FONTS

I have provided a visual of the list of options available under the 'Fonts' icon, many of which are self explanatory.

 Style	▶	Style Option – Choose from a range of fonts.
 Color	▶	Color Option – Choose from a range of colors.
 Size	▶	Size Option – Choose from a range of font sizes.
 Text Functions	▶	Text Functions Option – Allows three options: To Upper Case; To Lower Case; To Title Case.

CLAUSE

 Clause	Clause Option – This allows you to add specific clauses into a form. It will only work on multi-line boxes within the form.
--	--

TRANSACTION

I have provided a visual of the list of options available under the 'Transaction' icon, many of which are self explanatory.

 Add to Transaction	Add to Transaction – This allows you to add to an existing transaction.
 New Transaction from Form	New Transaction from Form – This allows you to create a new transaction within the form.

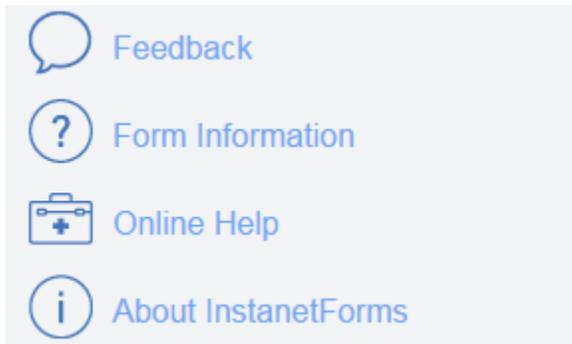
VIEW



View Option – Choose from a range of sizes to view the document

HELP

I have provided a visual of the list of options available under the ‘**Help**’ icon, many of which are self explanatory.



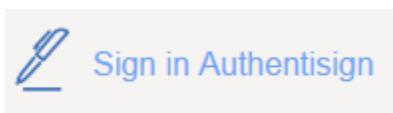
Feedback Option – This allows you to leave feedback.

Form Information Option – This allows you view information related to the document i.e. author, date created.

Online Help Option – This allows to search Transaction Desk for specific queries etc.

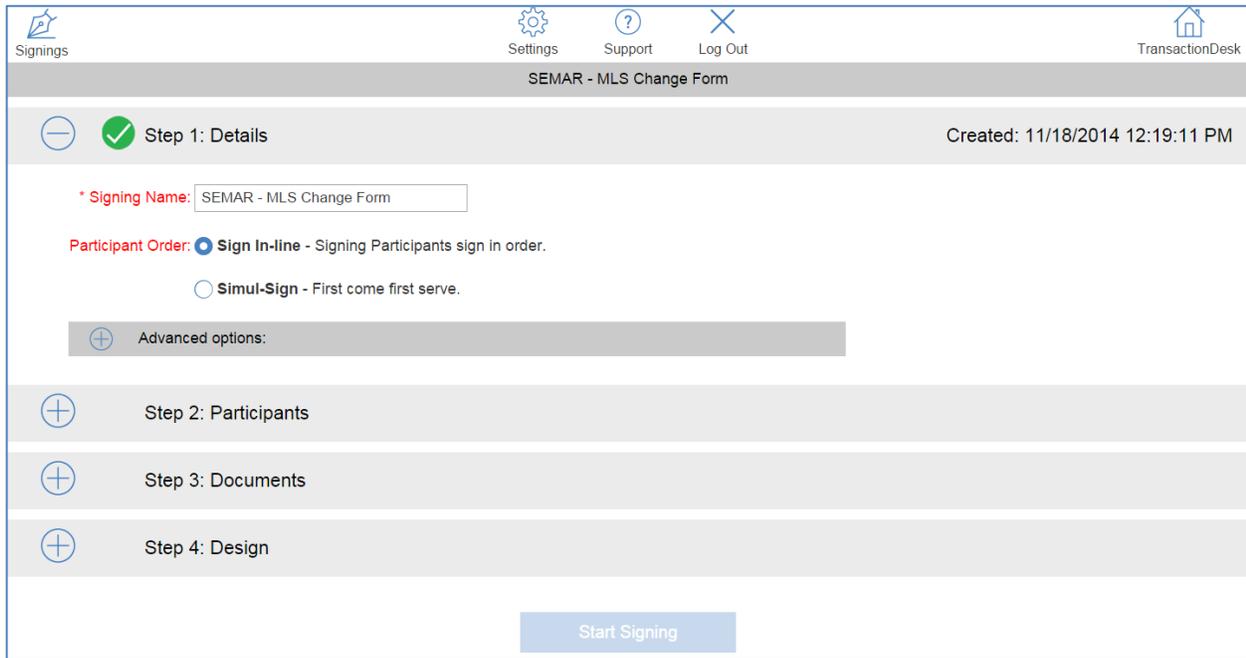
About InstanetForms Option – This takes you to Instanet Solutions webpage complete with contact details.

SIGN IN AUTHENTISIGN



Sign in Authentisign Option – This is the most important feature available with forms as it allows agents/clients to sign the forms online.

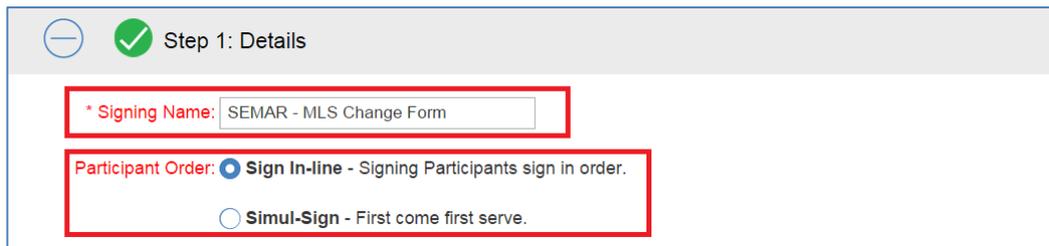
Click on the 'Sign in Authentisign' option and it will open a form similar to below:



The screenshot shows a web interface for creating a signing form. At the top, there are navigation icons for Signings, Settings, Support, Log Out, and TransactionDesk. The main title is "SEMAR - MLS Change Form". Below this, there are four steps: Step 1: Details (active), Step 2: Participants, Step 3: Documents, and Step 4: Design. The "Step 1: Details" section includes a "Signing Name" field with the value "SEMAR - MLS Change Form", a "Participant Order" section with radio buttons for "Sign In-line" (selected) and "Simul-Sign", and an "Advanced options" section. A "Start Signing" button is located at the bottom.

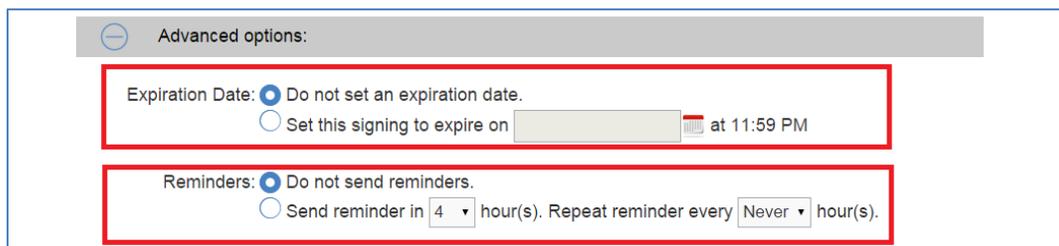
Depending on your preferences you can change a number of details within each of the steps.

For example in **Step 1: Details**, you can change the 'Signing Name' of the form that you email to agents/clients or the 'Participant Order' to 'Sign In-Line' or 'Simul-Sign'.



This close-up screenshot highlights the "Step 1: Details" section. It shows the "Signing Name" field containing "SEMAR - MLS Change Form" and the "Participant Order" section with the "Sign In-line" option selected. The "Simul-Sign" option is also visible.

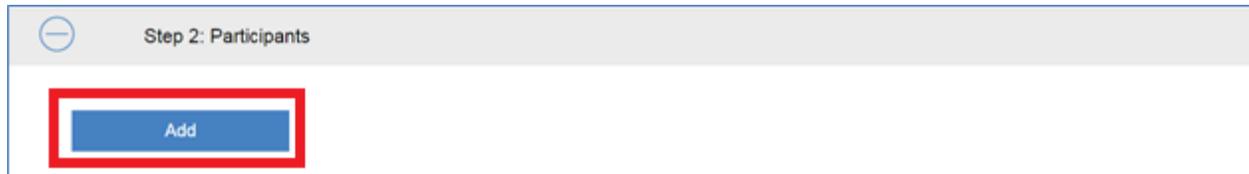
The 'Advanced Options' allows you to set an 'Expiration Date' or sent 'Reminders'.



This close-up screenshot highlights the "Advanced options" section. It shows the "Expiration Date" section with the "Do not set an expiration date" option selected, and the "Reminders" section with the "Do not send reminders" option selected. The "Send reminder in" field is set to 4 hours, and the "Repeat reminder every" field is set to Never.

STEP 2

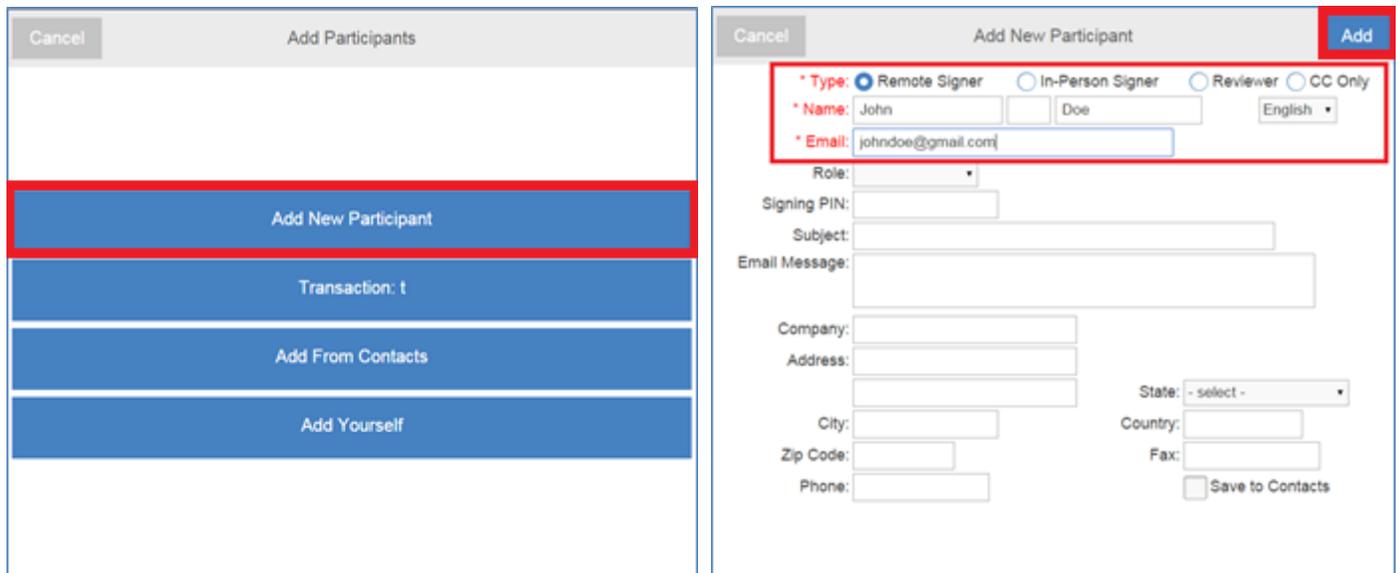
In **'Step 2: Participants'** click the **'Add'** button as highlighted below:



Depending on your preferences, you can select to **'Add a New Participant'**, **'Transaction'**, **'Add From Contacts'** or **'Add Yourself'**. Please see the screenshot on the next page:

For this example, I am going to select **'Add New Participant'** as highlighted below.

In the next screen select **'Type'**, **'Name'** and **'Email'** details and anything else you require. When you are finished, click **'Add'** to save the details.

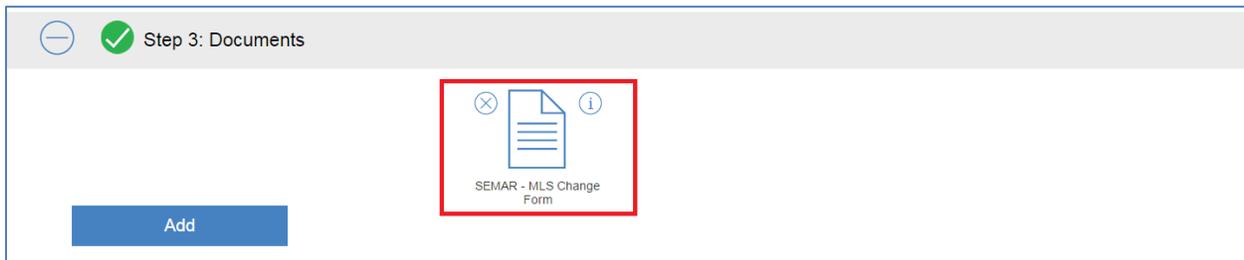


You will see your newly created contact details added as highlighted below:



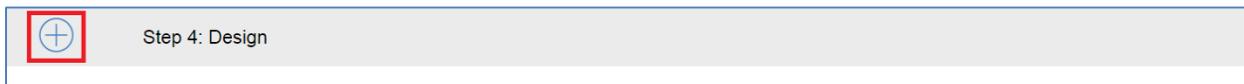
STEP 3

The **'Step 3: Documents'** will already contain the document you were working on by default as highlighted below. You can add more documents if you need to

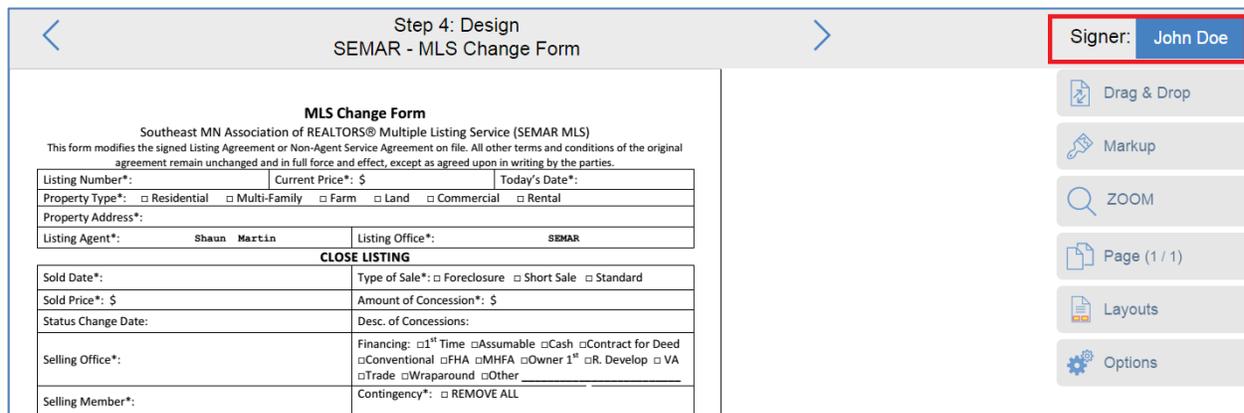


STEP 4

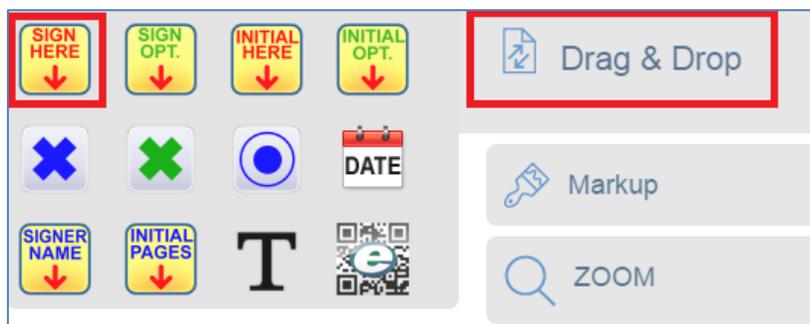
The **'Step 4: Design'** requires the user to click on the **'+'** sign to continue



You will see the document load that you were working on before, notice in the top right corner that it displays the **'Signer'** name.



Click on the **'Drag & Drop'** option highlighted below, and choose the icon you option you desire. For this example I am going to use **'Sign Here'**



This will create a 'Sign Here' placeholder with the agent/client name displayed.

Place the 'Sign Here' icon on the correct position where you want the agent/client to sign. See below for an example:

SIGNATURES	
All <u>owner signatures required</u> for Back on Market, Cancellations, Expiration Date changes (extensions), or Temporarily Off Market actions. Broker's signature required for Cancellations, Temporarily Off Market, or Add to Internet Actions. Agent/Broker Signature required for Extensions.	
Owner's Signature: SIGN HERE	Date:
Owner's Signature:	Date:
Agent's Signature: John Doe	Date:
Broker's Signature	Date:
Mandatory fields have an asterisk (*).	
Revised 06/20/2014 Instant forms	

When you have completed all of the above steps, click the right arrow as highlighted below to continue.

<

Step 4: Design
SEMAR - MLS Change Form

>

Signer: John Doe

<p>Selling Member*: _____ Contingency*: <input type="checkbox"/> REMOVE ALL</p> <p>Co-selling Member: _____</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 50%;">CHANGE LIST PRICE</th> <th style="width: 50%;">PEND LISTING</th> </tr> <tr> <td>New List Price*: \$ _____</td> <td>Pending Date*: _____</td> </tr> <tr> <th colspan="2" style="text-align: center;">CONTINGENCY</th> </tr> <tr> <td colspan="2"> <input type="checkbox"/> REMOVE ALL <input type="checkbox"/> 3rd Party Approval <input type="checkbox"/> Inspection <input type="checkbox"/> Sale of Another Property <input type="checkbox"/> Other (explain below) </td> </tr> <tr> <td colspan="2">Selling Office*: _____</td> </tr> <tr> <td colspan="2">Co-Selling Member: _____</td> </tr> <tr> <th style="width: 50%;">EXTEND OR EXPIRE LISTING</th> <th style="width: 50%;">WITHDRAW LISTING (TEMP. OFF MARKET)</th> </tr> <tr> <td>New Expire Date*: _____</td> <td>Withdrawal Date*: _____</td> </tr> <tr> <td colspan="2"> The undersigned parties to the original agreement, dated _____ do hereby agree to the changes as stated on this form and agree that all other terms of the original agreement shall remain unchanged and in full force and effect, except as the parties may agree in writing to change it in the future. All parties to original agreement must sign below. </td> </tr> <tr> <td colspan="2">OTHER CHANGES: knbghdhh bbhh</td> </tr> <tr> <th colspan="2" style="text-align: center;">SIGNATURES</th> </tr> <tr> <td colspan="2">All <u>owner signatures required</u> for Back on Market, Cancellations, Expiration Date changes (extensions), or Temporarily Off Market actions. Broker's signature required for Cancellations, Temporarily Off Market, or Add to Internet Actions. Agent/Broker Signature required for Extensions.</td> </tr> <tr> <td>Owner's Signature: SIGN HERE</td> <td>Date: _____</td> </tr> <tr> <td>Owner's Signature:</td> <td>Date: _____</td> </tr> <tr> <td>Agent's Signature: John Doe</td> <td>Date: _____</td> </tr> <tr> <td>Broker's Signature</td> <td>Date: _____</td> </tr> </table>	CHANGE LIST PRICE	PEND LISTING	New List Price*: \$ _____	Pending Date*: _____	CONTINGENCY		<input type="checkbox"/> REMOVE ALL <input type="checkbox"/> 3 rd Party Approval <input type="checkbox"/> Inspection <input type="checkbox"/> Sale of Another Property <input type="checkbox"/> Other (explain below)		Selling Office*: _____		Co-Selling Member: _____		EXTEND OR EXPIRE LISTING	WITHDRAW LISTING (TEMP. OFF MARKET)	New Expire Date*: _____	Withdrawal Date*: _____	The undersigned parties to the original agreement, dated _____ do hereby agree to the changes as stated on this form and agree that all other terms of the original agreement shall remain unchanged and in full force and effect, except as the parties may agree in writing to change it in the future. All parties to original agreement must sign below.		OTHER CHANGES: knbghdhh bbhh		SIGNATURES		All <u>owner signatures required</u> for Back on Market, Cancellations, Expiration Date changes (extensions), or Temporarily Off Market actions. Broker's signature required for Cancellations, Temporarily Off Market, or Add to Internet Actions. Agent/Broker Signature required for Extensions.		Owner's Signature: SIGN HERE	Date: _____	Owner's Signature:	Date: _____	Agent's Signature: John Doe	Date: _____	Broker's Signature	Date: _____	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 2px solid red; padding: 2px;">></div> <div style="text-align: right;">Signer: John Doe</div> </div> <div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 80%;"> <div style="display: flex; justify-content: space-around; margin-bottom: 5px;"> <div style="border: 1px solid gray; padding: 2px; text-align: center;">SIGN HERE ↓</div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">SIGN OPT. ↓</div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">INITIAL HERE ↓</div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">INITIAL OPT. ↓</div> </div> <div style="display: flex; justify-content: space-around; margin-bottom: 5px;"> <div style="border: 1px solid gray; padding: 2px; text-align: center;">X</div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">X</div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">O</div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">DATE</div> </div> <div style="display: flex; justify-content: space-around; margin-bottom: 5px;"> <div style="border: 1px solid gray; padding: 2px; text-align: center;">SIGNER NAME ↓</div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">INITIAL PAGES ↓</div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">T</div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">QR</div> </div> </div> <div style="width: 20%; text-align: center;"> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Drag & Drop</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Markup</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">ZOOM</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Page (1 / 1)</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Layouts</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Options</div> </div> </div> </div>
CHANGE LIST PRICE	PEND LISTING																																
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Owner's Signature: SIGN HERE	Date: _____																																
Owner's Signature:	Date: _____																																
Agent's Signature: John Doe	Date: _____																																
Broker's Signature	Date: _____																																

You will receive a message advising you that the invitation is setup. Select 'Send Invitations' to send the email to the agent/client. The agent/client will then receive the email and can create their signature to replace the placeholder you created previously.