

# **TRANSACTION DESK – USING FORMS**

Go to <u>www.flexmls.com</u> and sign-in.

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

			Help
Dashboard         Add/Change         Search         Daily Functions         Contacts         Taxes	Statistics Preferences Other Spark		
Classic 💌			Customize 👻
Listings	Contacts	F.	Searches
Status Total		AMV	View All View New
My Active Listings 0	Mew Customer Search	0 0 0	Shaun Test Search
My Listings 0			Shaun's Search 2
My Sold Listings 0			
. Add - Refer			
> Add a listing > Change a listing			
Change			
- Outern het eheet			
> 24-hour hot sheet			
Open House			
	> Add contact		
	> Presentations		
	(		> Full Search
	Messages	<b>N</b>	> Ouick Search
	New messages	0	> MLS # Find
	) [		
Message Board		8	Links
NEW MLS POLICY - Effective Immediately - Age	nts cannot give access information	on, codes or keys	** Transaction Desk **
to customers and clients other than owner/mar	ager without written consent of t	he seller. Fine for	Rochester Public Schools
violation of this policy is \$1000.			
			RPR website - https://www.narrpr.com/
			Book A Showing : www.bookashowing.com
			www.semprealtors.org
			www.semnrealtors.com
			Minnesota Association of REALTORS
			Realtor.com
			National Association of REALTORS
			MLS Change Form 2014
			IVILS Change Form - 2014

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

C C A https://app.transactiondesk.com/INETS_BIN/hsrun.hsx/INSTANETFORMS/INSTANETFORMS/StateId/P2wiohQ0SMDEs6gyvhOHhYLc0G42C-U6Jj/HAHTpage/HS_DM_Hor TransactionDESK Lite nstanet on Facebook Welcome Shaun Martin   Log Out I Language: English Spanish	ne 🛣 🧐 🚍
Home   Forms   Documents   Transactions   Templates   Contacts   InstanetFax <sup>10</sup>   Authentision <sup>10</sup>	
Forms Documents Transactions E-Signatures Contacts	
Send Feedback   Live Support   Free Training   System Messages   Settings   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:

→ C Attps://app.transactiondesk.com/INET5_BIN/hsrun.hsx/INSTANETFORMS/INSTANETFORMS/StateId/P29x8NQ0GAVEsx0	HvhFEBxXu0	G3t4LKS	/HAHTpage,	'HS_DM_FormLibrary	☆
TransactionDESK Lite Instanct on Facebook	Welcome Sha Spanish	un Martin   L	og Out		
Home   Forms   Documents   Transactions   Templates   Clauses   Contacts   Instant	tFax <sup>m</sup>   <u>A</u>	uthentisign™	: 🕜		
Forms Search for Forms MLS Change Form All Folders	<b>Q</b>				
Form Library (Click a name below to view your saved forms)	Print Blank	Create Nev	v Details		
A Brief Cuide to Mold, Moisture and Your Home	6				
Lead Paint Brochure	Ö	ŏ	<b>O</b>		
MNAR – Addendum to Commercial Purchase Agreement (MN-ACPA) – 08/13	Ö	Õ	<b>O</b>		
MAR - Addendum to Commercial Purchase Agreement: Assumption Financing (MN:ACPA:AF-1) - 08/14		0			
MNAR - Addendum to Commercial Purchase Agreement: Contract For Deed Financing (MN:ACPA:CFDF-1) - 08/14					

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

← → C 🔒 https://app.trans	🗲 🔿 🕻 🗎 https://app.transactiondesk.com/INET5_BIN/hsrun.hsx/INSTANETFORMS/INSTANETFORMS/StateId/P29x8NQ0GAvEsx0HvhFEBxXu0G3t4LKS/HAHTpage/HS_DM_FormLibrary 🖧 🧕 🗮						
	TransactionDESK Lite Instanct on Facebook	Language: <u>English S</u> i	Welcome Shaun Martin   Log Out				
	Home   Forms   Documents   Transactions   Forms	<u>Templates   Clauses   Contacts   InstanetF</u>	iax <sup>m</sup>   <u>Authentisign<sup>m</sup></u>				
	Search for Forms: MLS Change Form	All Folders 🔹 🕻	3				
	Form Library (Click a name below to view your saved forms)		Print Blank Create New Details				
	SEMAR – MLS Change Form (Rev. 06/14)	Viewing: 1 - 1 of 1	<b>a</b>				

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

← → C 🔒 https://app.trans	actiondesk.com/INET5_BIN/hsrun.hsx/INSTANETFORMS/IN:	STANETFORMS/StateId/P29x8NQ0GAvEsx0Hvh	FEBxXu0G3t4LKS/HAHTpage/	'HS_DM_FormLibrary 숤 🐵 🔳
	TransactionDESK Lite Instanct on Facebook	Language: <u>English Sp</u>	Welcome Shaun Martin   Log Out	
	Home   Forms   Documents   Transactions	<u>Templates   Clauses   Contacts   InstanetFa</u>	ux <sup>TM</sup>   <u>Authentisign<sup>TM</sup></u>	
	Forms		_	
	Search for Forms: MLS Change Form	All Folders 🔹 🔍		
	Form Library (Click a name below to view your saved forms)		Print Blank Create New Details	
	SEMAR - MLS Change Form (Rev. 06/14)	Viewing: 1 - 1 of 1	<b>e 0</b>	



#### 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'

← → C 🖀 https://app.transactiondes	sk.com/INET5_BIN/hsrun.hsx/INSTANETFORMS/INSTAN	ETFORMS/StateId/P2b7k9QYGnF	HEspShvhDiVFfC0XUew-UlMj/HAHTpage/DM_PrintBlankFormF දූ	ABP
Trans	SOCTIONDESK Lite Instanct on Facebook [f Like {4.28] Home   Forms   Recuments   Iransactions   Jemme	Language: j Lates i <u>Clauses</u> i <u>Contacts</u> i J	Welcome Shaun Martin j Log Out	
Vie	w Blank Form			
Right-c	lick the document below to print.		Return to Forms	
	MLS CI Southeast MN Association of REALTC This form modifies the signed Listing Agreement or Non-Agent agreement remain unchanged and in full force an Listing Number*: Current Price* Property Type*: Residential Multi-Family Fam Property Address*:	hange Form DRS® Multiple Listing Service (SEM// DRS® Multiple Listing Service (SEM// ervice Agreement on file. All other terms a d effect, except as agreed upon in writing ': \$ Today's I m _ Land _ Commercial _ Ren	IAR MLS) s and conditions of the original g by the parties. : Date*: intal	
	Listing Agent*:	Listing Office*:	Save as	
	Sold Date*:	Type of Sale*:  Foreclosure  Sho	Print	
	Sold Price*: \$	Amount of Concession*: \$	Rotate clockwise	
	Status Change Date:	Desc. of Concessions:	Rotate counterclockwise	
	Selling Office*:	Financing: □1 <sup>st</sup> Time □Assumable = □Conventional □FHA □MHFA □O □Trade □Wraparound □Other	Inspect element	
	Selling Member*:	Contingency*:   REMOVE ALL		
	Co-selling Member:			

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'** 

← → C 🔒 https://app.transactiondesk.com/INE	ET5_BIN/hsrun.hsx/INSTANETFORMS/INSTANE	TFORMS/StateId/P2b7k9QYGnHEspShvł	nDiVFfC0XUew-UlMj/HAHTpage/DM_PrintBlankFormF ☆ 💩
Transaction	Forms   Documents   Transactions   Temple	W Language: <u>Enalish Spa</u> tes   <u>Clauses   Contacts   InstanetFax</u>	reterme Shaun Martin   Log Out
View Blan	nk Form		
Right-click the docum	ment below to print.		Seturn to Forms
This fr Listing Prope	MLS Ch Southeast MN Association of REALTO form modifies the signed Listing Agreement or Non-Agent S agreement remain unchanged and in full force ans ng Number*: Current Prices* Desidential Multi-Family Fam	ange Form Sto® Multiple Listing Service (SEMAR MLS) rvice Agreement on file. All other terms and conditi effect, except as agreed upon in writing by the part S Today's Date': D Land Commercial Rental	ons of the original ies.
Prope	erty Address*:		
Listing	ng Agent*:	Listing Office*:	
Sold D	CLOS Date*:	Type of Sale*:   Foreclosure  Short Sale	Save as
Sold P	Price*: \$	Amount of Concession*: \$	Pint
Status	is Change Date:	Desc. of Concessions:	Rotate clockwise
Selling	ng Office*:	Financing: □1 <sup>st</sup> Time □Assumable □Cash □Conventional □FHA □MHFA □Owner 1 <sup>st</sup> □Trade □Wraparound □Other	Inspect element
Selling	ng Member*:	Contingency*:   REMOVE ALL	

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

← → C 🔒	https://app.transactiondesk.con	n/INET5_BIN/hsrun.hsx/INSTANETFOR	MS/INSTANETFORMS/StateId/P2b7k9	QYGnHEspShv	hDiVFfC0XUew-UlMj/HA	HTpage/DM_PrintBlankFormF 😭 👜
Print Total: <b>1 shee</b> t	t of paper Print Cancel		MLS CI Southeast MN Association of FEATC This form modifies the signed Lising Agreement or Non-Agers agreement remain unchanged and in ML force an Listicine Number 2	hange Form DRS® Multiple Listing Se iervice Agreement on file. Al d effect, except as agreed up 's S	rvice (SEMAR MLS) lother terms and conditions of the original on in writing by the parties. 1 Today's tame*:	
Destination	Change		Property Type*: ci Residential ci Multi-Family ci Fan Property Address*: Listing Agent*: CLOS Sold Date*:	Listing Office*: E LISTING Type of Sale*:  Diffice*:	rcial 🗆 Rental	
Pages	• All		Sold Price*: \$ Status Change Date: Selling Office*:	Amount of Concession* Desc. of Concessions: Financing: D1* Time D DConventional DFHA D DTrade DWraparound	: \$ Assumable :::Cash :::Contract for Deed :MHFA :::Downer 1 <sup>st</sup> ::R. Develop ::: VA :::Cother	
Copies	1 + -		Selling Member*: Co-selling Member: CHANGE LIST PRICE New List Price*: \$	Pending Date*:	PEND LISTING	
Paper size	Letter		CONTINGENCY    REMOVE ALL	Selling Office*: Selling Member*: Co-Selling Member: WITHDRAW LI	ISTING (TEMP. OFF MARKET)	
Color	<ul><li>Color</li><li>Black and white</li></ul>		New Expire Date*: The undersigned parties to the original agreement, dated 	Withdrawal Date*:  Add Listing to Interne Cancel Date*: Ba	et Database (was withheld) CANCEL LISTING ACK ON MARKET	
Options	<ul> <li>✔ Fit to page</li> <li>✔ Two-sided</li> </ul>		writing to change it in the future. All parties to original agreement must sign below. OTHER CHANGES: SIGI	Expire Date*: Fallthrough Date:		
Print using sy	rstem dialog (Ctrl+Shift+P)		All <u>owner signatures required</u> for Back on Market, Cancellations, actions. Brockr's signature required for Cancellations, Temporari required for Extensions. Owner's Signature:	Expiration Date changes (ex ly Off Market, or Add to Inte	tensions), or Temporarily Off Market rnet Actions. Agent/Broker Signature Date:	
			Owner's Signature:		Date:	
			Agent's Signature:		Date:	
			Broker's signature Mandatory fields have an asterisk (*)		Date: Revised 06/20/2014 Ipstan t Forms	



## **CREATE NEW FORM**

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

← → C 🔒 https://app.trans	actiondesk.com/INET5_BIN/hsrun.hsx/INSTANETFORMS/INSTANE	TFORMS/StateId/P2b7k9QYGnHEspShvhDiVFfC0XUew-UIMj/HAHTpage/HS_DM_FormLibrary 🏠 🤓 🔳
	TransactionDESK Lite nstanet on Facebook	Welcome Shaun Martin   Log Out Language: <u>English Stanish</u>
	Home   Forms   Documents   Transactions   Temp	lates   Clauses   Contacts   InstanetFax <sup>**</sup>   Authentision <sup>**</sup>
	Forms	
	Search for Forms: Change	II Folders T Q
	Form Library (Click a name below to view your saved forms)	Print Blank Create New Details
	SEMAR - MLS Change Form (Rev. 06/14) Viet	ing: 1 - 1 of 1

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

https://app.transactiondesk.com/Instanet/	FransactionDesk/Forms/TabletEditForm.aspx?5573657247	7554944=41384235393841452D423738322D343835372D4241424	
File - 🗛 Fonts - 📔 Clau	Ise 🔐 Transaction • 🔛 • 💮 •	Z Sign in Authentisign	
	MLS Change Forn	n	
Southeast	MN Association of REALTORS® Multipl	e Listing Service (SEMAR MLS)	
This form modifies the signed Li	sting Agreement or Non-Agent Service Agreeme	ent on file. All other terms and conditions of the original	
Listing Number*:	Current Price*: \$	Today's Date*	
Property Type*: Resident	ial 🔲 Multi-Family 🔲 Farm 🔲 Land	Commercial Rental	
Property Address*:			
Listing Agent*:	Listing Office	e*:	
	CLOSE LISTING		
Sold Date*:	Type of Sale	*:  Foreclosure Short Sale Standard	
Sold Price*: \$	Amount of C	Concession*: \$	
Status Change Date: 📷	Desc. of Con	ncessions	
Selling Office*:	Financing: E Convention Trade W	1 <sup>st</sup> Time Assumable Cash Contract for Deed nal FHA MHFA Owner 1 <sup>st</sup> R. Develop VA raparound Other	
Selling Member*:	Contingency	*:   REMOVE ALL	
Co-selling Member:			

- (1)

Sign in Authentisign

H7 -

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

Clause

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Transaction -

r

A Fonts -

File 🔻



# **FILE**

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

Ð	New		New Option – Create a new form.
	Open Form		<b>Open Form Option</b> – Select a form to use.
	Save		Save Form Option – Saves your form input.
PDF	Save as PDF		Save as PDF Form Option – Saves your form as a PDF.
ß	Сору		<b>Copy Form Option</b> – Allows you to create a copy of the form.
\$	Clear	F	<b>Clear Form Option</b> – Allows two options to clear current page or all pages.
Base	Watermark	ŀ	Watermark Option – Allows three options: Confidential; Draft or Remove Watermark.
Ŵ	Delete		Delete Form Option – Deletes the form.
Ē	Print		Print Form Option – Prints the form.
$\rightarrow$	Send	•	<b>Send Form Option</b> – Allows four options: Email; Fax; Send to DocBox; Sign in Authentisign
$\times$	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.



#### **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.





## 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.



#### 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:

jan signings	کې Settings	? Support	X Log Out	TransactionDesk
	SEMAR	- MLS Change	e Form	
Step 1: Details				Created: 11/18/2014 12:19:11 PM
* Signing Name: SEMAR - MLS Change Form				
Participant Order: O Sign In-line - Signing Participants sign in	order.			
Simul-Sign - First come first serve.				
Advanced options:				
Step 2: Participants				
Step 3: Documents				
Step 4: Design				
	S	Start Signing		

Depending on your preferences you can changes 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'.

Step 1: Details	
* Signing Name: SEMAR - MLS Change Form	
Participant Order: O Sign In-line - Signing Participants sign in order.	
◯ Simul-Sign - First come first serve.	

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

Advanced options:
Expiration Date: O Do not set an expiration date. O Set this signing to expire on at 11:59 PM
Reminders: O Do not send reminders. O Send reminder in 4 • hour(s). Repeat reminder every Never • hour(s).



#### STEP 2

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

Θ	Step 2: Participants
	Add

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.

Cancel Add Participants	Cancel Add New Participant Add
	Type: Remote Signer In-Person Signer Reviewer CC Only     Name: John Doe English •     Email: johndoe@gmail.com     Role: •
Add New Participant	Signing PIN: Subject:
Transaction: t	Email Message:
Add From Contacts	Address:
Add Yourself	City: Country: Country: Country: Phone: Save to Contacts

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

Step 2: Participants		
	(i) John Doe	
Add		



#### 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 3: Documents		
	SEMAR - MLS Change Form	
Add		

#### STEP 4

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

$\oplus$	Step 4: Design		

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

< s	Step 4: Des EMAR - MLS Cha	ign ange Form	>	Signer: John Doe
MLS CI	nange Form			Drag & Drop
Southeast MN Association of REALTC This form modifies the signed Listing Agreement or Non-Agent S agreement remain unchanged and in full force an	ORS® Multiple Listing Serv ervice Agreement on file. All ot d effect, except as agreed upor	rice (SEMAR MLS) ther terms and conditions of the original n in writing by the parties.		🔊 Markup
Listing Number*: Current Price*	:\$ m □ Land □ Commercia	Today's Date*:		O 700M
Property Address*:				Q 200M
Listing Agent*: Shaun Martin	Listing Office*:	SEMAR		
CLOS	E LISTING			Page (1 / 1)
Sold Date*:	Type of Sale*: □ Foreclosu	ire		
Sold Price*: \$	Amount of Concession*: \$	\$		
Status Change Date:	Desc. of Concessions:			Layouts
Selling Office*:	Financing: D1 <sup>st</sup> Time DAss Conventional DFHA DM DTrade Wraparound DC	sumable Cash Contract for Deed		ở Options
Selling Member*:	Contingency*:   REMOVE	E ALL		

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 owner signatures required for B	Back on Market, Ca	ellations, Expiration Date changes (extensions), or Temporarily Off Market
actions. Broker's signature require	d for Cancellations	emporarily Off Market, or Add to Internet Actions. Agent/Broker Signature
required for Extensions.		
Owner's Signature:		Date:
Owner's Signature:		Date:
Agent's Signature:	Doe	Date:
Broker's Signature		Date:
Mandatory fields have an asterisk	( <b>*).</b> .	Revised 06/20/2014

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

<s< th=""><th>Step 4: De EMAR - MLS Ch</th><th>sign lange Form</th><th></th><th><math>\geq</math></th><th></th><th></th><th>Signer: John D</th></s<>	Step 4: De EMAR - MLS Ch	sign lange Form		$\geq$			Signer: John D
Selling Member*:	Contingency*:  REMO	OtherVE ALL		SIGN HERE			Drag & Drop
Co-selling Member:							
CHANGE LIST PRICE		PEND LISTING	1	<b>X</b> X		DATE	A Markup
New List Price*: \$	Pending Date*:		1				25 Markup
CONTINGENCY	Selling Office*:			SIGNER INITIAL NAME PAGES	T		
□ REMOVE ALL □ 3 <sup>rd</sup> Party Approval □ Inspection □ Sale of Another Property □ Other (explain below)	Selling Member*:				L i		Q ZOOM
	Co-Selling Member:						
EXTEND OR EXPIRE LISTING	WITHDRAW LIS	STING (TEMP. OFF MARKET)					Page (1 / 1)
New Expire Date*:	Withdrawal Date*:						
The undersigned parties to the original agreement, dated	Add Listing to Internet	t Database (was withheld)					
do hereby agree to the changes as	C	ANCEL LISTING					Layouts
stated on this form and agree that all other terms of the original agreement shall remain unchanged and in full	Cancel Date*:						
force and effect, except as the parties may agree in	BA	CK ON MARKET					💕 Options
writing to change it in the future. All parties to original	Expire Date*:						· • •
agreement must sign below.	Fallthrough Date:						
OTHER CHANGES: Knignan bhbh							
SIG	NATURES		·				
All <u>owner signatures required</u> for Back on Market, Cancellations, actions. Broker's signature required for Cancellations, Temporari required for Extensions.	Expiration Date changes (ext ly Off Market, or Add to Inter	ensions), or Temporarily Off Market net Actions. Agent/Broker Signature					
Owner's Signature:		Date:					
Owner's Signature:		Date:	]				
Agent's Signature:		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.