



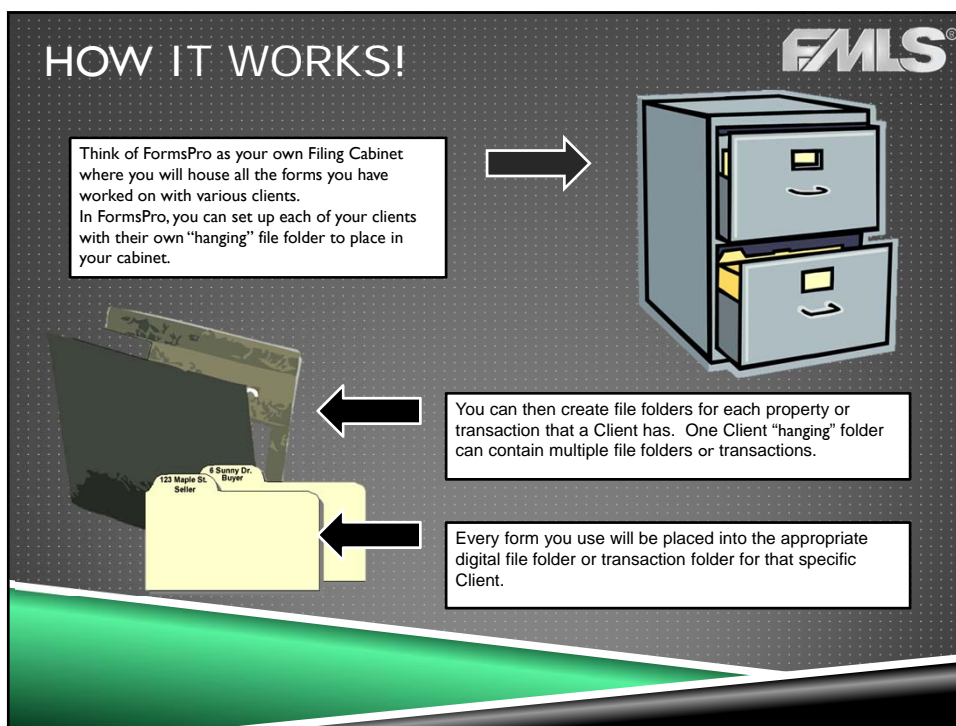
FMLS[®]

OBJECTIVES

Upon completion should be able to:

- ▶ Access and navigate FormsPro
- ▶ Create a digital Client Transaction
- ▶ Complete, edit, Print and email forms
- ▶ Deactivate/Reactivate clients and folders
- ▶ Printing blank GAR forms
- ▶ Use preferences to create/edit and email signature, import contacts, manage forms packages

A green silhouette of a person running with a briefcase is positioned to the right of the objectives list. The image is overlaid on a dark grey background with a white dotted pattern. The bottom of the slide features a green and black decorative graphic.



CUTOVER INFORMATION



- ▶ FormsPro replaces 1st Forms in the Spring.
- ▶ When FormsPro Training is complete, 1st Forms will become an “edit only” program.
- ▶ New transactions must be created in FormsPro.
- ▶ 1st Forms will be turned off completely in the Fall.
- ▶ Personal storage for transactions in 1st Forms may be accomplished by emailing documents to your Inbox in 1st TransAction, by creating CDs, or by storage on external hard drives.



Let's get started.

FORMS PRO HOMEPAGE

Timeout in 120 min

K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)

Help Give Feedback Quick Start Preferences Sign Out

Homepage (List of Clients)

Add New Client

Client Last Name	Client
1 Buyer	Bertha
2 Cullen	Edward
3 Portman	Natalie
4 Sheen	Charles

Quick Start

Add a New Client

Add Form(s) to a Client & Folder

Work with an Existing Client

Quick Print

Note: If you close this window, you can always re-open it from the Quick Start link on the menu at the top-right of the page.

Show this Quick Start window every time. Close

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Don't want to see quick start window when you open the FormsPro home page? Just uncheck!

FORMSPRO HOMEPAGE

Timeout in 104 min

K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)

Help Give Feedback Quick Start Preferences Sign Out

Homepage (List of Clients)

Add New Client

Client Last Name	Client First Name	New Form	Filter Results	Refresh
1 Buyer	Bertha	2	Wed, Feb 23, 2011	Feb 23, 2011
2 Cullen	Edward	1	Mon, Feb 28, 2011	Feb 28, 2011
3			Feb 28, 2011	Mar 2, 2011
4			Mar 2, 2011	Mar 2, 2011

For your safety, FormsPro will time out after 120 minutes, while you are active in the program, FormsPro refreshes automatically!

When you are finished, sign out!

If you are part of a team or an assistant you can act on behalf of those you support, with appropriate permissions

FORMSPRO HOMEPAGE

The screenshot shows the FMLS FormsPro homepage. At the top right is the FMLS logo. Below it, the title "FORMSPRO HOMEPAGE" is displayed. The main content area includes a navigation bar with buttons for "Add New Client", "View/Edit", "Deactivate", "Add New Form", "Filter Results", and "Refresh". Below the navigation bar is a table listing clients with columns for "Client Last Name", "Client First Name", "Folders", "Created", and "Modified".

Callouts with arrows point to the top navigation bar and the "Filter Results" button, with the following text:

- FormsPro User Guide**
- Let us know what you think with a short feedback form!
- Add a New Client, add forms to a client and/or folder, work with an existing client, quick print or show the quick start window
- Edit your email signature, import contacts, manage forms packages and restore deactivated clients and folders from here!

BREADCRUMB NAVIGATION BAR

The screenshot shows the FMLS FormsPro breadcrumb navigation bar. At the top right is the FMLS logo. Below it, the title "BREADCRUMB NAVIGATION BAR" is displayed. The main content area includes a navigation bar with buttons for "New Form(s)", "View/Edit", "Formset", "Print", "Email", "Filter Results", and "Refresh". Below the navigation bar is a table listing forms with columns for "Name", "Saved By", "Created", and "Modified".

A callout with an arrow points to the breadcrumb navigation bar, with the following text:

- Breadcrumb navigation lets you know where you are – and backtrack if needed!

ADDING A NEW CLIENT

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	Client First Name	Folders	Created	Modified
1	Bertha	2	Wed, Feb 23, 2011	Wed, Feb 23, 2011
2	Edward	2	Mon, Feb 28, 2011	Tue, Mar 8, 2011
3	Mad	2	Fri, Mar 18, 2011	Fri, Mar 18, 2011
4	Mary	1	Wed, Mar 23, 2011	Wed, Mar 23, 2011
5	Lindsay	2	Thu, Mar 3, 2011	Thu, Mar 3, 2011
6	Natalie	3	Mon, Feb 28, 2011	Wed, Mar 2, 2011
7	Charlie	2	Wed, Mar 2, 2011	Wed, Mar 2, 2011
8	Alice	1	Tue, Mar 8, 2011	Tue, Mar 8, 2011

ADD A NEW CLIENT WINDOW

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ADDING A FOLDER TO A CLIENT

Step #1
Enter the FMLS#, if you know it – if not, proceed to Step #2

Step #2
Folder name defaults to property address if you entered FMLS #, or just make it Preliminary Contracts – you can always change it – now or later!

Step #3
Choose your client type

Make your notes, customize too!

To keep going

To stop and come back to later

I changed my mind

FMLS FormsPro | Timeout in 120 min | K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself) | Help | Give Feedback | Quick Start | Preferences | Sign Out

Homepage (List of Clients) > Client: Gary Bussey

Client Folders | Client Information

Folder: NEW FOLDER

FMLS #: [Load FMLS Data]

Folder Name: [Property Address]

Type: Buyer | Seller | Landlord | Tenant

Notes: [Empty text area]

Save & Continue | Save & Close | Cancel

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CUSTOMIZING A FOLDER

FMLS FormsPro | Timeout in 118 min | K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself) | Help | Give Feedback | Quick Start | Preferences | Sign Out

Homepage (List of Clients) > Client: Natalie Portman

Client Folders | Client Information

Folder: NEW FOLDER

FMLS #: 4169043 | Reload Data

Folder Name: 5674 Hollowbrooke Lane

Type: Buyer | Seller | Other

Notes: This doesn't need any additional work
http://www.realtor.com/realestateandhomes-detail/5674-Hollowbrooke-Ln_Acworth_GA_30181_M63990-25419

Save & Continue | Save & Close | Cancel

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ADDING FMLS PROPERTY



Once you load your FMLS # - a dialog box lets you know it has been loaded to the folder

WORK WITH EXISTING CLIENT



Letting your mouse hover over a client's number will give you a quick link window to select a property folder and add/view/edit documents

Client Last Name	Client First Name	Folders	Created	Modified
1 Buyer	Bertha	2	Wed, Feb 23, 2011	Wed, Feb 23, 2011
2 Cullen	Edward	2	Mon, Feb 28, 2011	Tue, Mar 8, 2011
3 Hatter	Mad	2	Fri, Mar 18, 2011	Fri, Mar 18, 2011
4 Lamb	Mary	1	Wed, Mar 23, 2011	Wed, Mar 23, 2011
5 Lehan	Lindsay	2	Thu, Mar 3, 2011	Thu, Mar 3, 2011
6		3	Mon, Feb 28, 2011	Wed, Mar 2, 2011
7		2	Wed, Mar 2, 2011	Wed, Mar 2, 2011
8		1	Tue, Mar 8, 2011	Tue, Mar 8, 2011

EXISTING CLIENTS

FMLS®
Timeout in 120 min
Help Give Feedback Quick Start Preferences Sign Out

FMLS FormsPro
K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)

Homepage (List of Clients)

Add New Client
View/Edit
Deactivate
Add New Form(s)
Filter Results
Refresh

	Client Last Name	Client First Name	Folders	Created	Modified
1	Buyer	Bertha	2	Wed, Feb 23, 2011	Wed, Feb 23, 2011
2	Cullen	Edward	2	Mon, Feb 28, 2011	Tue, Mar 8, 2011
3	Hatter	Mad	2	Fri, Mar 18, 2011	Fri, Mar 18, 2011
4	Lamb	Mary	1	Wed, Mar 23, 2011	Wed, Mar 23, 2011
5	Lohan	Lindsay	2	Thu, Mar 3, 2011	Thu, Mar 3, 2011
6	Portman	Natalie	3	Mon, Feb 28, 2011	Wed, Mar 2, 2011
7	Sheen	Charlie	2	Wed, Mar 2, 2011	Wed, Mar 2, 2011
8	Wonderland	Alice	1	Tue, Mar 8, 2011	Tue, Mar 8, 2011

Or: Select the client to see the folder(s) associated with them

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SELECTING YOUR FORMS

FMLS®
Timeout in 116 min
Help Give Feedback Quick Start Preferences Sign Out

FMLS FormsPro
K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)

Homepage (List of Clients)

Add New Client
View/Edit
Deactivate
Add New Form(s)
Filter Results
Refresh

	Client Last Name	Client First Name	Shortcut to add forms to client folders	Modified
1	Bussey	Gary	0	Tue, Apr 19, 2011
2	Buyer	Bertha	2	Wed, Feb 23, 2011
3	Cullen	Edward	2	Mon, Feb 28, 2011
4	Hatter	Mad	2	Fri, Mar 18, 2011
5	Lamb	Mary	1	Wed, Mar 23, 2011
6	Lohan	Lindsay	2	Thu, Mar 3, 2011
7	Portman	Natalie	3	Mon, Feb 28, 2011
8	Sheen	Charlie	2	Wed, Mar 2, 2011
9	Wonderland	Alice	1	Tue, Mar 8, 2011

To add a new form to a folder, simply select Add New Form(s)

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SELECTING YOUR FORMS



The browse options allows you to find your forms by Category, then form number. Click the + to expand!

BROWSE OPTION



Using the + to uncollapse the sections allows viewing the categories easily

BROWSE SELECTION

The screenshot shows the FMLS FormsPro web application. A 'Select Form(s)' dialog box is open, displaying a tree view of form categories. The 'PURCHASE AND SALE AGREEMENTS, COUNTEROFFER, LEASE/PURCHASE AGREEMENT, OPTION AGR...' category is expanded, showing a list of forms: F20 Purchase and Sale Agreement (2011), F21 Special Stipulations (2011), F22 Counteroffer (2011), F23 New Construction Purchase and Sale Agreement (2011), F24 New Construction Exhibit (2011), F25 Pre-Construction Specifications Exhibit (2011), F26 Walk Through List (2011), F27 Lot Purchase and Sale Agreement (2011), F29 Lease/Purchase Agreement (2011), F30 Lease for Lease/Purchase Agreement Exhibit (2011), and F31 Option Agreement (2011). An arrow points to this list with the text: "Defaults by Form # in the category, if you don't know – you can search!".

SEARCH OPTION

The screenshot shows the same 'Select Form(s)' dialog box, but with the 'Search' tab selected. The 'Form Name' input field is empty. Below it, there are radio buttons for 'Starts With' and 'Contains'. The 'Search Results' area is empty. An arrow points to the 'Search Results' area with the text: "Use the Starts With or Contains to find the form you are looking for!".

SEARCH SELECTION

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WORD OR PHRASE SEARCH

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FORMS PACKAGES



Being able to create and save Forms Packages is a great feature to FormsPro! When you or your office creates a Forms Package – they will live here for quick access! See how to create Forms Packages shortly, now let's see a form!

Name	Owner
1 Office Buyer	FIRST MULTIPLE LISTING SERVICE
2 Preliminary Buyer Form	BEAUDON, K JAN
3 Preliminary Seller Form	BEAUDON, K JAN
4 the entire office	FIRST MULTIPLE LISTING SERVICE

COMPLETING THE FORM




The more information you put in initially, the more will come over to your form. There are two views available. This is the Form View. We will look at the quick view next – as you can see you have full functionality from this screen and some perks – like blue or black ink, spellcheck insert N/A, watermark if desired and jump to page!

1. Purchase and Sale. The undersigned buyer ("Buyer") agrees to buy and the undersigned seller ("Seller") agrees to sell the Property with the following address: 1202 BENBROOKE COURT, City of Peach County, Georgia. TAXIDIPN# 0-0323-0-036-0 together with all those identified in any Seller's Property Disclosure Statement attached to this contract shall be a part of the legal description of the property.

2. Legal Description. The full legal description of the Property is: (Select A, B or C below. The sections not marked shall not be a part of the legal description of the property.)

3. Purchase Price and Method of Payment. At closing, Buyer agrees to pay Seller the purchase price of the Property of \$ U.S. Dollars: cash, wire transfer of immediately available funds, or a cashier's check issued for the closing by a federally insured bank, savings bank, credit union or other depository institution, or a check payable to the order of the Seller, or a combination of the above, provided that the above basis of payment shall be subject to the terms and conditions of the applicable instrument.

COMPLETING THE FORM



Timeout in 120 min Help Give Feedback Quick Start Preferences Sign Out

K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)

Homepage (List of Clients) > Client: Wonderland, Alice > Folder: 1202 BENBROOKE Court > Form: F20 Purchase and Sale Agreement (2011)

Quick View

Save Spell Check Insert N/A's Remove N/A's

Date Of Offer For Purchase And Sale Agreement

Property Street Address 1202 BENBROOKE Court

Property City Acworth

Property Zip Code 30301

Property Tax ID 20-0229-0-056-0

Legal Description

Attached As Exhibit

Identical To Deed

Deed Book

Deed Book Page

Deed County

Described Below

Property Land Lot 0

Property District 20

Property Section 2nd


Property Lot 176R

Property Block 1

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This QuickView allows you to complete the form in a format that is easy! This is the way to enter property information for those properties not listed with FMLS, such as FSBO's.

REVIEW – FORMS SELECTION



Bunny_Bugs / 1202 BENBROOKE Court

Browse Search Form Packages

Form Source(s)

GAR

LEASE AGREEMENT

CONTRACTOR ENGAGEMENTS, AUTHORIZATION TO SHOW UNLISTED PROPERTY, AGENCY EXHIBITS,...

PURCHASE AND SALE AGREEMENTS, COUNTEROFFER, LEASE/PURCHASE AGREEMENT, OPTION AGR...

F20 Purchase and Sale Agreement (2011)

F21 Special Stipulations (2011)

F22 Counteroffer #3 (2011)

F22 Counteroffer #4 (2011)

F23 New Construction Purchase and Sale Agreement (2011)

F24 New Construction Exhibit (2011)

Save & Continue Save & Close Cancel

Bunny_Bugs / 1202 BENBROOKE Court

Browse Search Form Packages

Form Name/Form # f13 Contains Clear

Search Results:

F13 Protect Yourself When Buying a Home

F130 New Construction Agreement (Cost Plus)

F131 New Construction Agreement (Stipulated Sum)

F132 Unilateral Withdraw Offer

F133 Notice to Legally Extend Closing Date Up to Seven Days

F134 Notice to Legally Extend Inspection Period

Select

F13 Protect Yourself When Buying a Home

Remove

Save & Continue Save & Close Cancel

Let's Review! You can select your forms by BROWSE then category then select OR SEARCH with a word, phrase or form number. Now let's move on to Forms Packages!

FORMS PACKAGES

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Name	Type	Forms	Created	Modified
1 5674 Hollowbrooke Lane	Buyer	4	Fri, Mar 4, 2011	Fri, Mar 4, 2011
2 608 Chestnut Oak Court NW	Seller	1	Fri, Mar 4, 2011	Fri, Mar 4, 2011

Once the forms are selected for a particular client, if you decide these are the forms you use most, you can create a Forms Package! Think of it as a copy feature (it won't copy the information too, just the form). If your office has special forms, most likely, you will find your Forms Packages already loaded

CREATING A NEW FORMS PACKAGE

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Based On: Natalie Portman / 5674 Hollowbrooke Lane

Forms Package Name:

Save for: Just myself The entire office

Included Forms:

- F20 Purchase and Sale Agreement
- F21 Special Stipulations #1
- F23 Commission Confirmation Agreement/Instructions to Closing Attorney
- F4 Exclusive Buyer Brokerage Agreement

When you click Forms Package, you will see:
 Required Field of Forms Package Name.
 Save for: Just myself (most members will see just this option. Entire office applies to Brokers and Office Managers.
 Included Forms: You can add/edit your Forms Package(s) at any time.

ADDING FOLDERS AND FORMS

The screenshot shows the FMLS Forms Pro interface for a client named Natalie Portman. The 'Client Folders' tab is active, displaying a table of folders. Two callout boxes with arrows point to the 'Add New Folder' and 'Add New Form' buttons in the toolbar.

Name	Type	Forms	Created	Read
3596 Cantrell Road	Buyer	3	Mon, Feb 28, 2011	Wed, Mar 2, 2011
574 Hollowbrooke Lane	Buyer	4	Fri, Mar 4, 2011	Fri, Mar 4, 2011
608 Chestnut Oak Court NW	Seller	1	Fri, Mar 4, 2011	Fri, Mar 4, 2011

You can add a Folder (property) to an existing client at any time!

You can also add a Form at any time!

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EDITING IN FORMS PRO

The screenshot shows the FMLS Forms Pro interface with the 'View' button highlighted in the toolbar. A callout box points to the 'View' button, indicating that editing is possible.

Name	Type	Forms	Created	Modified
3596 Cantrell	Buyer	3	Mon, Feb 28, 2011	Wed, Mar 2, 2011
574 Hollowbrooke	Buyer	4	Fri, Mar 4, 2011	Fri, Mar 4, 2011
608 Chestnut Court NW	Seller	1	Fri, Mar 4, 2011	Fri, Mar 4, 2011

If you need to edit a client, a folder or a form – it is easily done

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REVIEW ADDING & EDITING

- ▶ You can Add and/or Edit:
 - ▶ Your Client (s)
 - ▶ From Quick Start Window
 - ▶ Quick Start Dropdown
 - ▶ Your Folder (Property Information)
 - ▶ From Save & Continue after you have added your client
 - ▶ From Quick Start Dropdown at any point
 - ▶ From Icon on your Client page at any point
 - ▶ Your Forms
 - ▶ From Save & Continue after you have added your Folder
 - ▶ From Quick Start Dropdown at any point
 - ▶ From Icon on your Client page at any point

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PRINTING FORMS

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PRINT OPTIONS

The screenshot shows the FMLS FormsPro web application interface. At the top right is the FMLS logo. The main header area includes the user name 'K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)' and navigation links like 'Help', 'Give Feedback', 'Quick Start', 'Preferences', and 'Sign Out'. Below this is a breadcrumb trail: 'Homepage (List of Clients) > Client: Natalie Portman > Folder: 5674 Hollowbrooke Lane'. A toolbar contains icons for 'New Form(s)', 'View/Edit', 'Remove', 'Print', 'Email', 'Filter Results', and 'Refresh'. A list of forms is visible on the left, including 'F4 Exclusive Buyer Brokerage Agreement', 'F20 Purchase and Sale Agreement', 'F21 Special Stipulations #1', and 'F32 Commission Confirmation Agreement/Instructions to Closing Attorney'. A 'Print/Email' dialog box is open, titled 'Watermark', with the instruction 'Click on an image to select your desired watermark:'. It shows three preview images: 'No Watermark', 'Draft', and 'Sample'. A callout box with a black background and white text says: 'You can choose No Watermark, or Draft or Sample Watermark! Once you have made your selection, click OK and your form(s) will be ready to print!'. The dialog has 'OK' and 'Cancel' buttons at the bottom.

PRINT OPTIONS

This screenshot shows the same FMLS FormsPro interface as the first image. The 'Print/Email' dialog box is now open to a different screen. It displays the text 'Building F20 Purchase and Sale Agreement Combining forms' and 'Your form(s) are ready. You may now:'. Below this text is a blue hyperlink: 'Download, View, and/or Print the results'. A large black arrow points upwards from a callout box towards the link. The callout box has a black background and white text that reads: 'You have options! You can download, view and/or print!'. The rest of the interface, including the toolbar and form list, remains the same as in the previous image.

EMAILING A FORM

The screenshot shows the FMLS FormsPro interface. At the top, it says 'EMAILING A FORM' and 'FMLS®'. Below that, there's a navigation bar with 'Selected Forms', 'Profile Data', 'Folder Information', and 'Folder History'. A toolbar contains icons for 'New Form(s)', 'View/Edit', 'Remove', 'Print', 'Email', 'Filter Results', and 'Refresh'. The 'Email' icon is highlighted with a black arrow pointing to it. Below the toolbar is a table of forms:

Name	Saved By	Created	Modified
F4 Exclusive Buyer Brokerage Agreement	K JAN BEAUDOIN	Fri, Mar 4, 2011	Fri, Mar 4, 2011
F20 Purchase and Sale Agreement	K JAN BEAUDOIN	Fri, Mar 4, 2011	Fri, Mar 4, 2011
F21 Special Stipulations #1	K JAN BEAUDOIN	Fri, Mar 4, 2011	Fri, Mar 4, 2011
F32 Commission Confirmation Agreement/Instructions to Closing Attorney	K JAN BEAUDOIN	Fri, Mar 4, 2011	Fri, Mar 4, 2011

Emailing is a snap! Highlight the form, select the Email Icon

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EMAILING A FORM

The screenshot shows the FMLS FormsPro interface with a 'Select Forms to Email' dialog box open. The dialog box has a title bar 'Print/Email' and a list of forms with checkboxes:

- F20 Purchase and Sale Agreement
- F21 Special Stipulations #1
- F32 Commission Confirmation Agreement/Instructions to Closing Attorney
- F4 Exclusive Buyer Brokerage Agreement

At the bottom of the dialog box are 'OK' and 'Cancel' buttons. A black arrow points to the list of forms. Below the dialog box is a text box:

You can select which forms you wish to email

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EMAIL OPTIONS

The screenshot shows the FMLS FormsPro web application interface. At the top right is the FMLS logo. The main header area contains the text 'EMAIL OPTIONS'. Below this is a navigation bar with 'Home', 'Give Feedback', 'Quick Start', 'Preferences', and 'Sign Out'. The user is logged in as 'K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)'. The breadcrumb trail shows 'Homepage (List of Clients) > Client: Natalie Portman > Folder: 5674 Hollowbrooke Lane'. A toolbar includes 'New Form(s)', 'View/Edit', 'Remove', 'Print', 'Email', 'Filter Results', and 'Refresh'. A list of forms is visible on the left, including 'F4 Exclusive Buyer Brokerage Agreement', 'F20 Purchase and Sale Agreement', 'F21 Special Stipulations #1', and 'F32 Commission Confirmation Agreement/Instructions to Closing Attorney'. A 'Print/Email' dialog box is open, titled 'Watermark'. It contains the instruction 'Click on an image to select your desired watermark:' and three preview images: 'No Watermark', 'Draft Watermark', and 'Sample Watermark'. The 'No Watermark' option is selected. At the bottom of the dialog are 'OK' and 'Cancel' buttons. A text box at the bottom of the dialog reads: 'Just as the print option, you can select with or without a watermark'. The footer includes '© 2011 by WebToolset.com, Inc.' and 'FMLS Technical Support'.

EMAIL OPTIONS

The screenshot shows the FMLS FormsPro web application interface. At the top right is the FMLS logo. The main header area contains the text 'EMAIL OPTIONS'. Below this is a navigation bar with 'Home', 'Give Feedback', 'Quick Start', 'Preferences', and 'Sign Out'. The user is logged in as 'K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)'. The breadcrumb trail shows 'Homepage (List of Clients) > Client: Natalie Portman > Folder: 5674 Hollowbrooke Lane'. A toolbar includes 'New Form(s)', 'View/Edit', 'Remove', 'Print', 'Email', 'Filter Results', and 'Refresh'. A list of forms is visible on the left, including 'F4 Exclusive Buyer Brokerage Agreement', 'F20 Purchase and Sale Agreement', 'F21 Special Stipulations #1', and 'F32 Commission Confirmation Agreement/Instructions to Closing Attorney'. An 'Email Forms' dialog box is open, titled 'Email Information'. It contains the following fields: 'From: K JAN BEAUDOIN / jbeaudoin@fmls.com', 'To: [Required]', 'Subject: [Required]', and 'Message Body: [Rich Text Editor]'. A checkbox is checked for 'Send me a copy of this email'. The signature block includes 'Jan Beaudoin, FMLS Trainer, 678-420-4439 (Direct Line), jbeaudoin@fmls.com'. At the bottom of the dialog are 'Send' and 'Cancel' buttons. A text box at the bottom of the dialog reads: 'Email is so easy and customizable! Make note of the required fields: To and Subject.' The footer includes '© 2011 by WebToolset.com, Inc. All Rights Reserved.' and 'FMLS Technical Support'.

EMAIL OPTIONS

You will get the same window as if you were printing

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DEACTIVATING A CLIENT

It is easy to deactivate a client – no worries, you can always reactivate! Highlight the client you wish to deactivate and click the deactivate icon!

Client Last Name	Class	1	2	3
1. Buyer	Bertha	2	Wed, Feb 23, 2011	Wed, Feb 23, 2011
2. Cullen	Edward	2	Mon, Feb 28, 2011	Tue, Mar 8, 2011
3. Lohan		2	Thu, Mar 3, 2011	Thu, Mar 3, 2011
4. Portman		3	Mon, Feb 28, 2011	Wed, Mar 2, 2011
5. Sheen		1	Wed, Mar 2, 2011	Wed, Mar 2, 2011
6. Wonderland		1	Tue, Mar 8, 2011	Tue, Mar 8, 2011

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DEACTIVATING A FOLDER

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If you wish to deactivate a Folder, simply select the folder you wish to deactivate and click the deactivate icon. Reactivating is easy too! Reactivating is done in Preferences – let's go there now!

PREFERENCES

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Preferences – My Preferences window

EMAIL SIGNATURE

FMLS

Timeout in 115 min | Help | Give Feedback | Quick Start | Preferences | Sign Out

K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)

Homepage (List of Clients)

Add New Client

Client Last Name	Client
1. Bunny	Bugs
2. Buyer	Bertha
3. Cullen	Edwa
4. Lohan	Linds
5. Portman	Natal
6. Sheen	Charl
7. Wonderland	Alice

My Preferences | Email Signature: K JAN BEAUDOIN

Jan Beaudoin
FMLS Trainer
678-420-4439 (Direct Line)
jbeaudoin@fmls.com

Creating your customized email signature is a snap!

Save | Cancel

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IMPORT CONTACTS

FMLS

Timeout in 114 min | Help | Give Feedback | Quick Start | Preferences | Sign Out

K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as Myself)

Homepage (List of Clients)

Add New Client

Client Last Name	Client
1. Bunny	Bugs
2. Buyer	Bertha
3. Cullen	Edwa
4. Lohan	Linds
5. Portman	Natal
6. Sheen	Charl
7. Wonderland	Alice

Import Contacts | Import Contacts: K JAN BEAUDOIN

INSTRUCTIONS:
To import contacts from another source for use in FormsPro:
Begin by exporting the contact(s) from that source in a CSV (comma separated) or TXT format.
When the CSV or TXT file has been created and saved on your computer, follow the steps below to import into FormsPro.

1. Click on the Browse button to locate the file on your computer.
2. Click on the Upload button.
3. Click to place a dot next to Fusion if your contact(s) were exported from Fusion, or click to place a dot next to 1st.

From Fusion
 From 1st Connection

You may only upload CSV and TXT files.
Maximum files size is 4,096 KB.

Upload | Browse | Upload | Cancel

Importing your contacts is easy - Step by Step instructions are provided

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MANAGE FORM PACKAGES

My Form Packages: K JAN BEAUDOIN

Name	Buyer/Seller Form	Created	Modified
1		Wed, Mar 2, 2011	Wed, Mar 2, 2011
2		Wed, Mar 2, 2011	Wed, Mar 2, 2011

Callout 1: You can then rename, add or delete forms to your package (s) OR delete the package all together!

Callout 2: When you want to make a change to a forms package(s) you highlight the one you would like to change.

MANAGING FORMS PACKAGES

Package Forms: Preliminary Buyer Forms

In Use:

- GAR-F004-2011 - F4 Exclusive Buyer Brokerage Agreement
- GAR-F020-2011 - F20 Purchase and Sale Agreement
- GAR-F021-1-2011 - F21 Special Stipulations #1
- GAR-F032-2011 - F32 Commission Confirmation Agreement/Instructions to Closing Attorney

Available:

- GAR-CF001-2011 - CF1 Commercial Exclusive Seller Listing Agreement
- GAR-CF002-2011 - CF2 Commercial Purchase and Sale Agreement
- GAR-CF003-2011 - CF3 Commercial Purchase and Sale Agreement Exhibit 'A'
- GAR-CF004-B1-2011 - CF4-B1 Commercial Purchase and Sale of Business Not
- GAR-CF004-B2-2011 - CF4-B2 Commercial Purchase and Sale of a Residential, Office, Retail or Industrial Building
- GAR-CF004-B3-2011 - CF4-B3 Commercial Purchase and Sale of Equipment and/or Other Personal Property
- GAR-CF005-2011 - CF5 Commercial Purchase and Sale Agreement Exhibit 'C' (Additions to Seller's Closing Document)
- GAR-CF006-2011 - CF6 Commercial Purchase and Sale Agreement Exhibit 'D' (Seller's Warranties and Representations)
- GAR-CF007-2011 - CF7 Commercial Open Listing Agreement (For Leases)

Callout: Adding or removing a form to your existing form package is a breeze. To remove: Highlight the form to be removed, then click remove. To Add: Select the form from the dropdown, then click add.

RESTORE DEACTIVATED ITEMS

FMLS[®]

out in 120 min Help Give Feedback Quick Start Preferences Sign Out

K JAN BEAUDOIN at FIRST MULTIPLE LISTING SERVICE (Acting as: Myself)

Billie Portman

FMLS Forms

Restore Deactivated Items: K JAN BEAUDOIN

Deactivated clients and folders are highlighted in green in the window to the left.

To restore a client:

1. Locate the client in the client list.
2. Click once on the client's name, then choose **Restore** from the popup box.
3. The client will be reactivated and will appear in the list of clients.

To restore a folder:

1. Click on the + sign to expand a client's folder.
2. Locate the deactivated folder (it will be highlighted in green).
3. Click once on the folder name, then choose **Restore** from the popup box.
4. The folder will be reactivated and will appear in the client's list of folders.

Done

To restore a deactivated client or folder is easy! Step by Step instructions allow you to reactivate!

LET'S REVIEW

FMLS[®]

You now know how to:

- ▶ Access and navigate FormsPro
- ▶ Create a digital Client Transaction
- ▶ Complete, edit, print and email forms
- ▶ Deactivate/Reactivate clients and folders
- ▶ Print blank GAR forms
- ▶ Use preferences to create/edit an email signature, import contacts, manage forms packages



1ST TRANSACTION FACTS

- ▶ 1stTransAction is your filing cabinet once your forms are complete
- ▶ 1stTransAction allows you to upload documents to your listing specific to that listing
- ▶ 1stTransAction can be used to house all types of documents
- ▶ 1stTransAction has a fax in feature as well as an e-mail inbox feature
- ▶ We offer a free 3 hour CE class on 1stTransAction



Have a Great Day!