



FORMS ON-LINE GOLD

New Toolbar Enhancements User Guide



FORMS ON-LINE GOLD

New Toolbar User Guide

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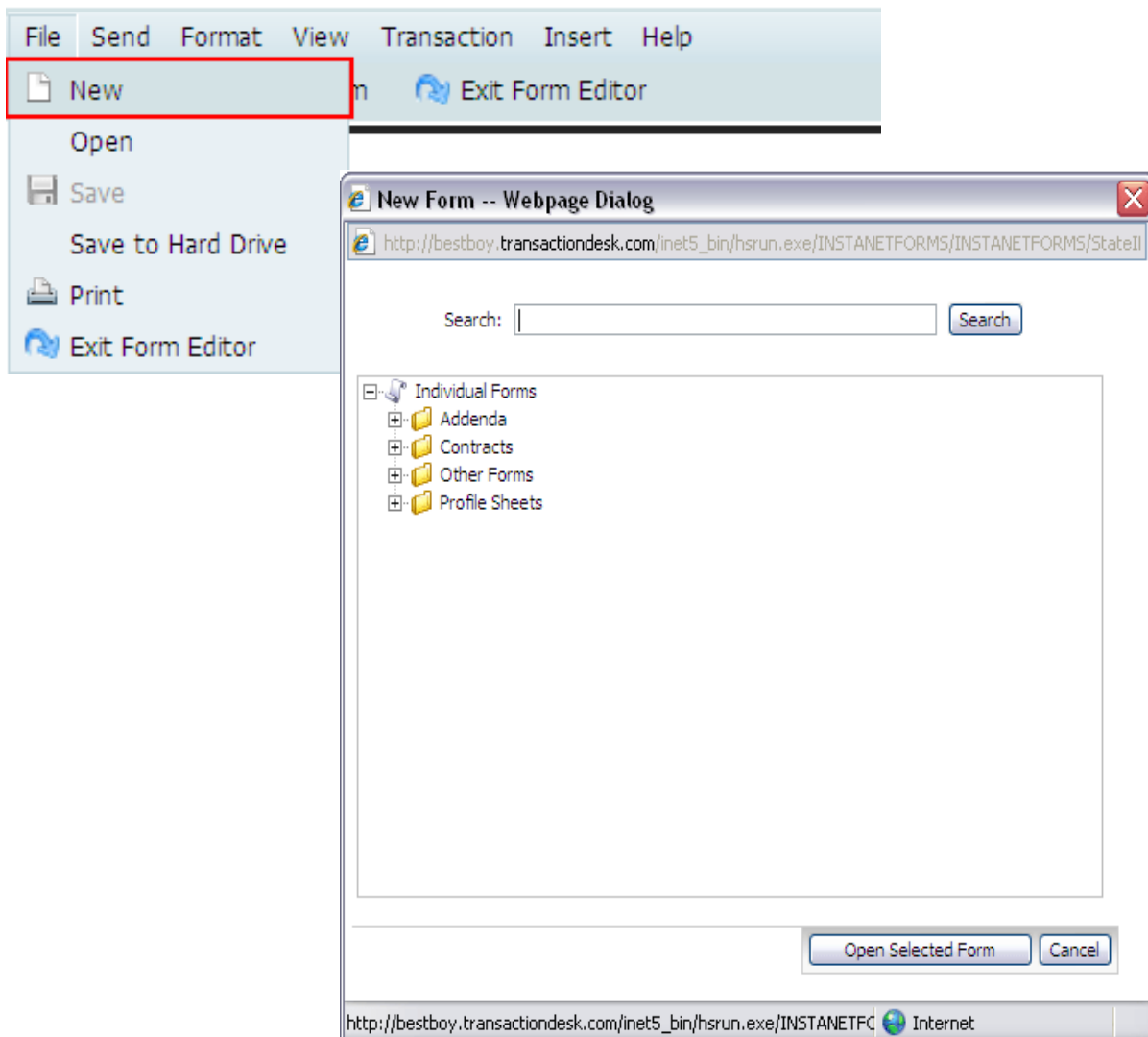
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New Toolbar User Guide

File >> New

- Clicking on “New” opens pop-up box.
 - User may search & select new forms to add to the transaction.

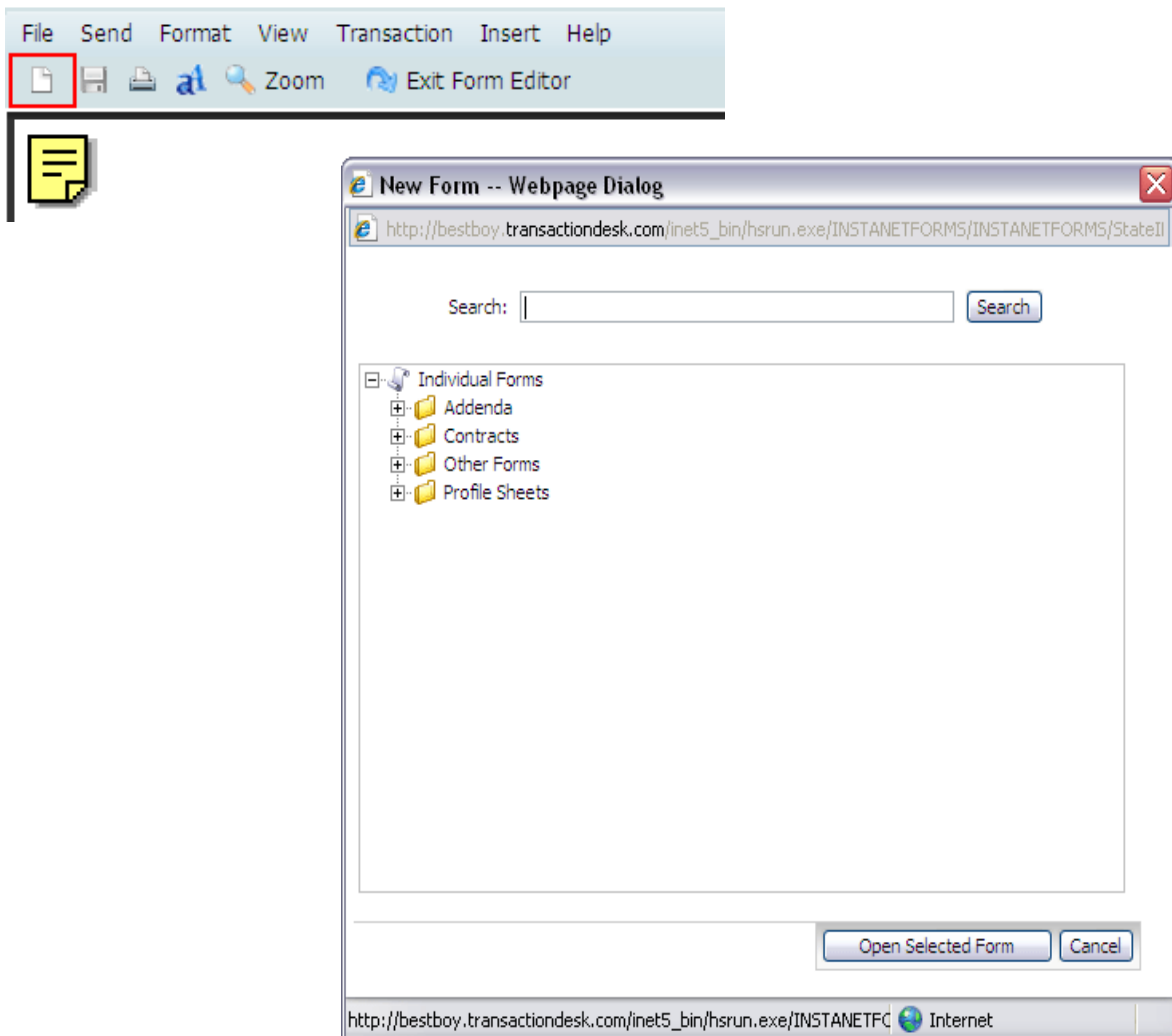


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New Toolbar User Guide

File >> New

- Clicking on “New” icon opens pop-up box.
 - User may search & select new forms to add to the transaction.



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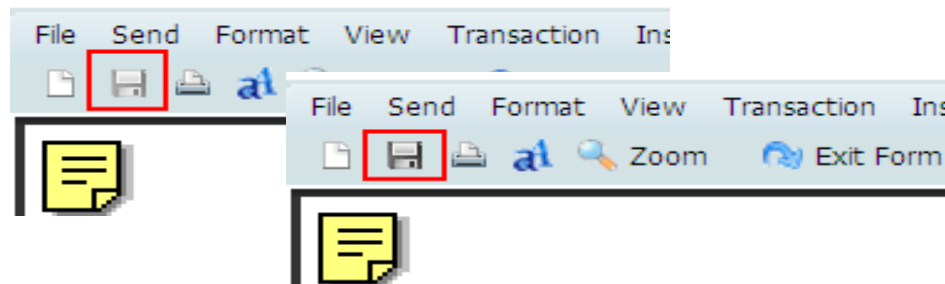
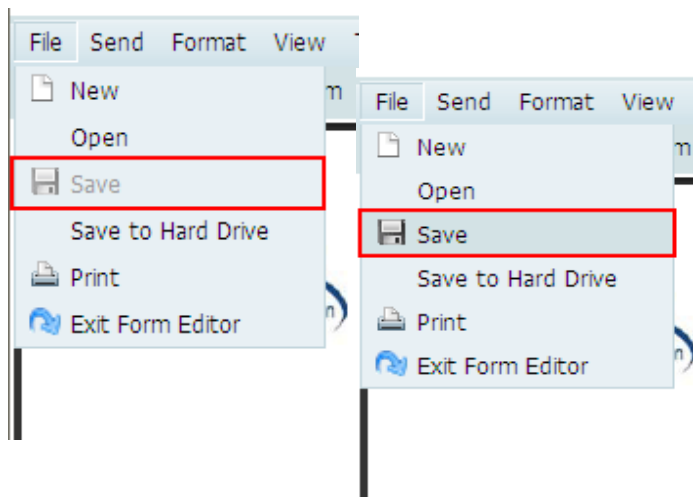
New Toolbar User Guide

File >> Save

- There are 3 ways to save your form.

1. Save from the menu.
2. 'Save' is also available from the icon toolbar.

Note: The 'Save' selection is only activated if a change has been made to the selected form. The user must move the cursor to another field.



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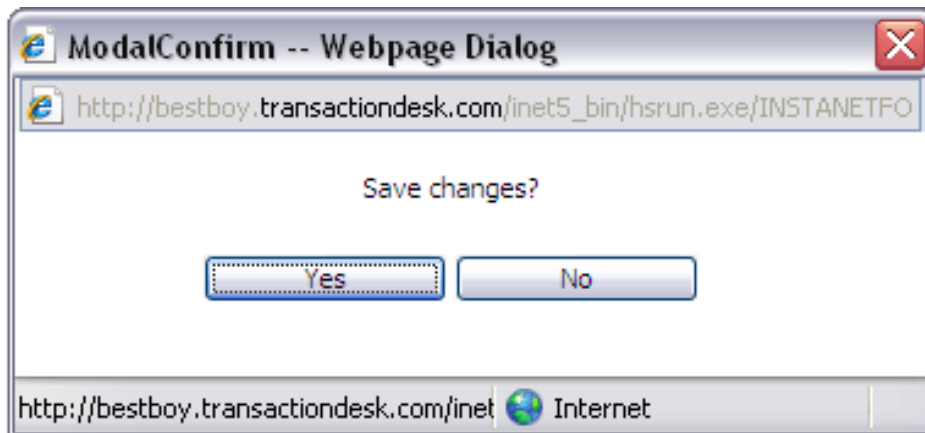
New Toolbar User Guide

File >> Save

3. Pop-up window: Save changes?

- If the user forgets to click “Save” a pop-up window appears when the user goes to another screen.

Note: This window only appears if a change has been made to the form.



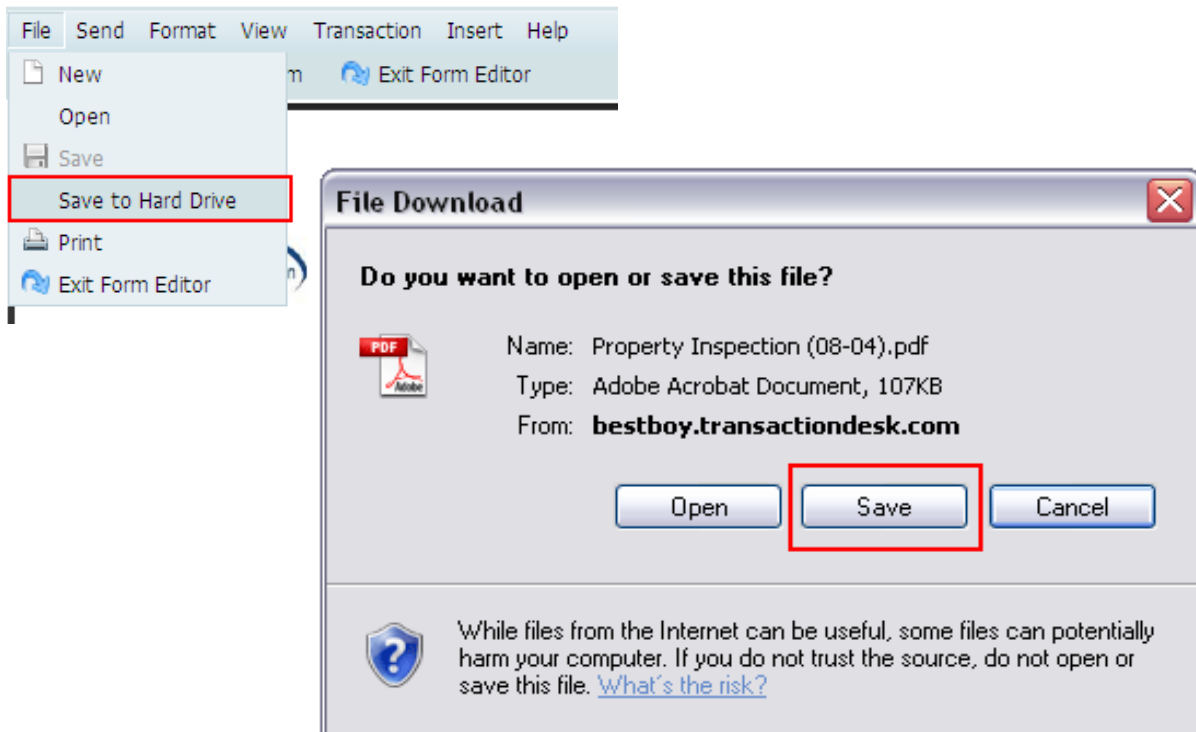
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New Toolbar User Guide

File >> Save To Hard Drive

'Save to Hard Drive' downloads the form to the user's hard drive.

- A pop-up appears asking the user whether to Open, Save or Cancel the file.
 - Click the 'Save' button.



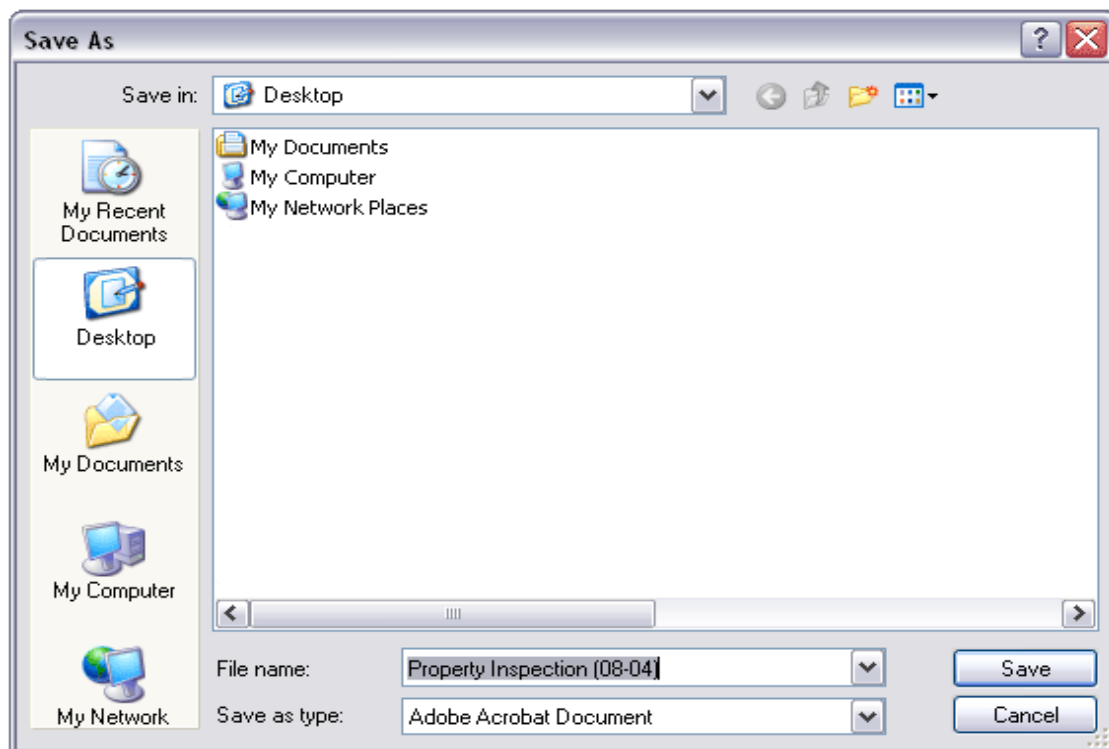
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File >> Save To Hard Drive

'Save to Hard Drive' downloads the form to the user's hard drive.

- Another popup then asks where to save the file.
- Browse to the location you wish to save and click 'Save'.



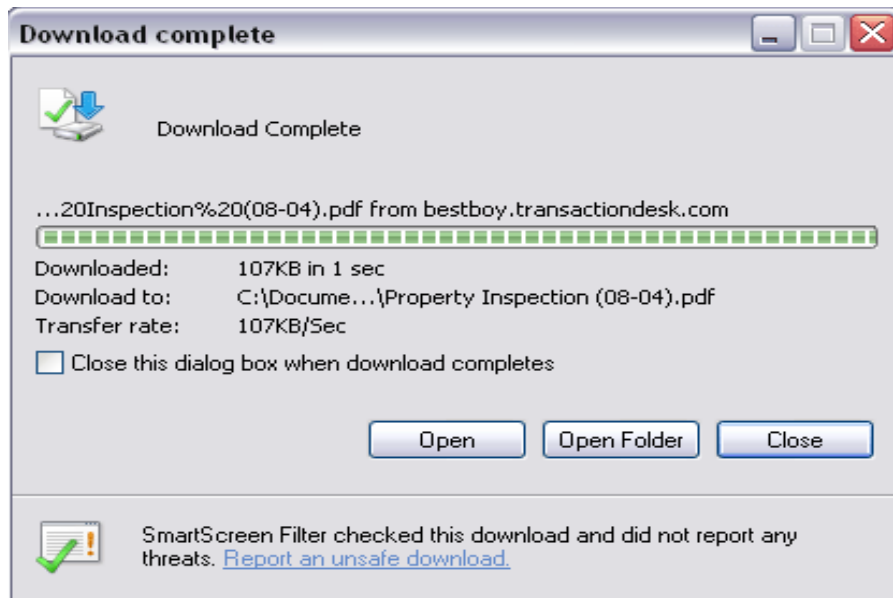
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New Toolbar User Guide

File >> Save To Hard Drive

'Save to Hard Drive' downloads the form to the user's hard drive.

- When the download is complete click the 'Close' button.
- The file is now saved to your computer.



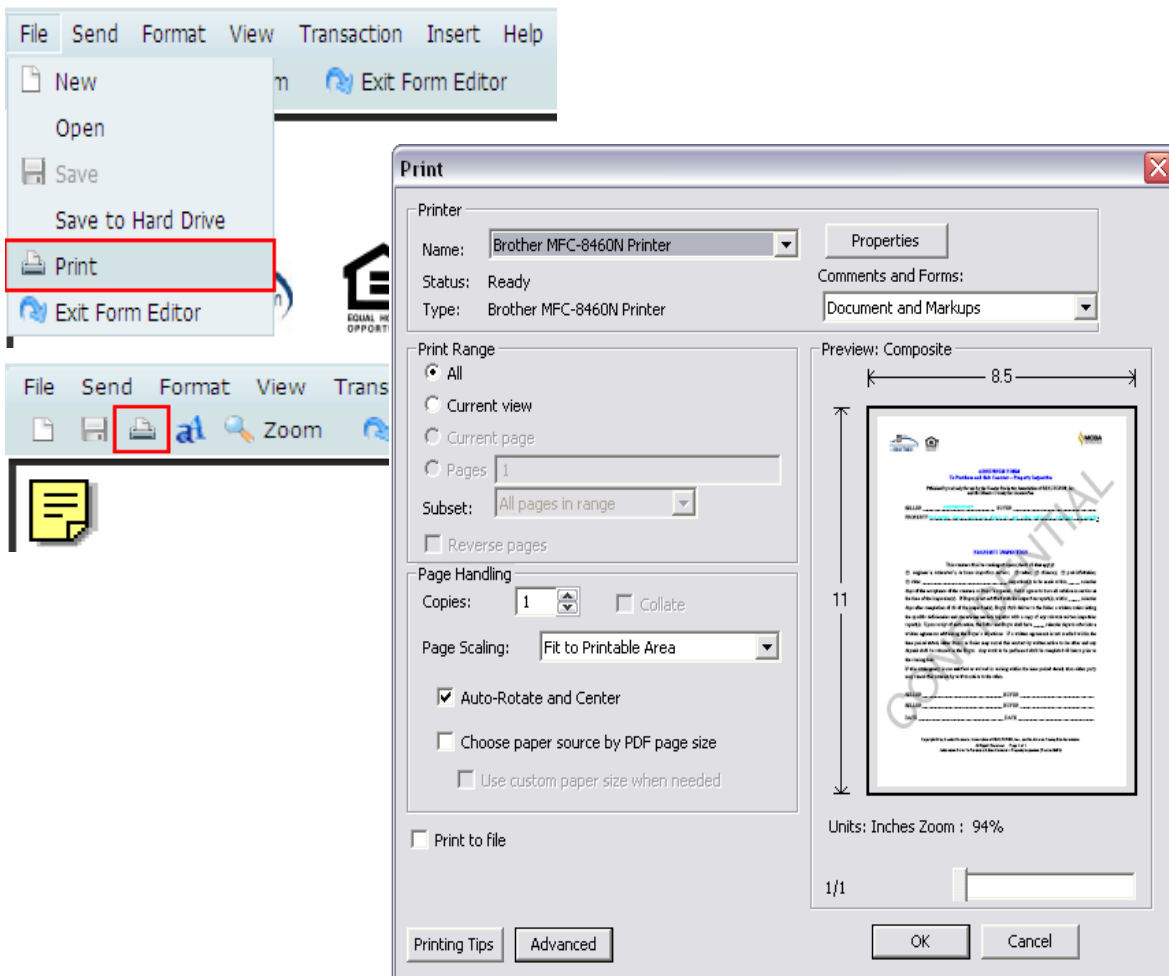
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File >> Print

'Print' prints the selected form.

- Available from the menu or the icon toolbar.



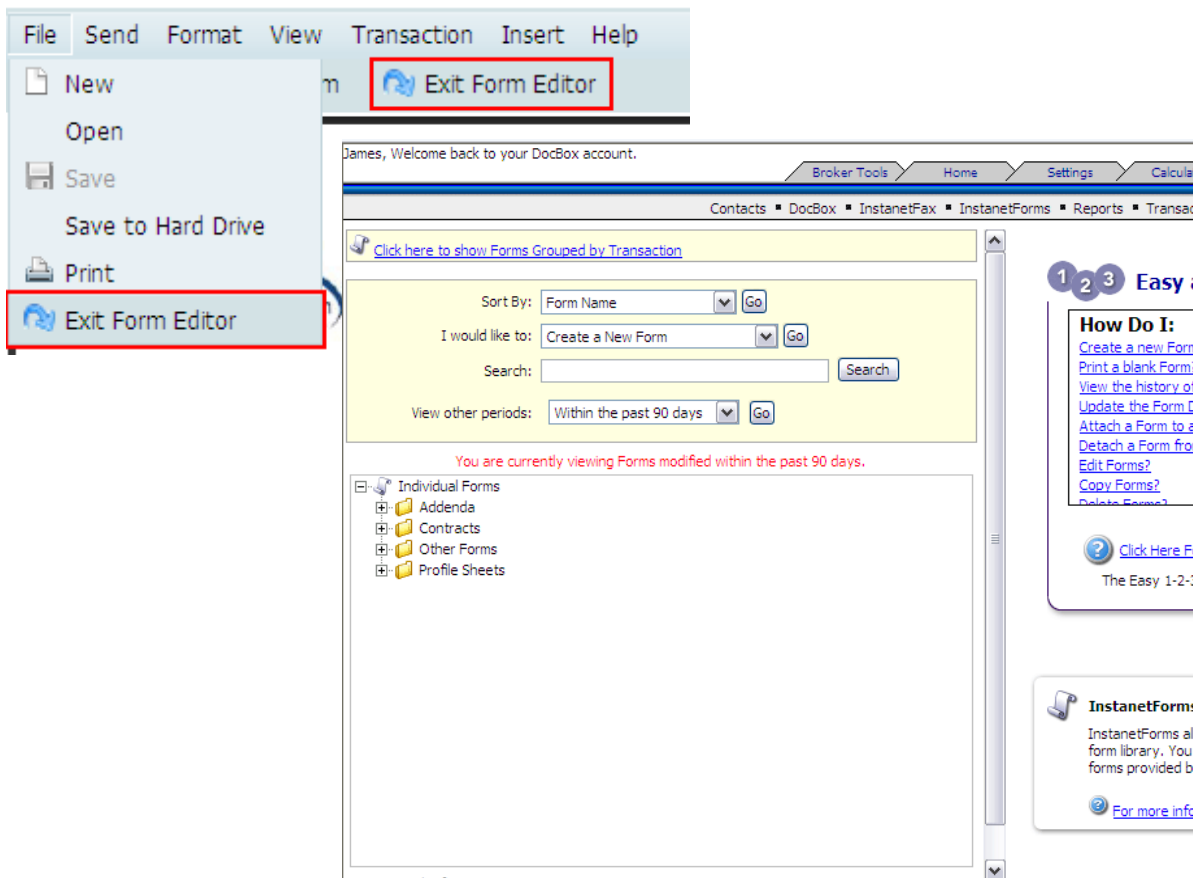
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File >> Exit Form Editor

'Exit Form Editor' is available in both the toolbar and the icon toolbar.

- Clicking on it returns the user to the previous page.



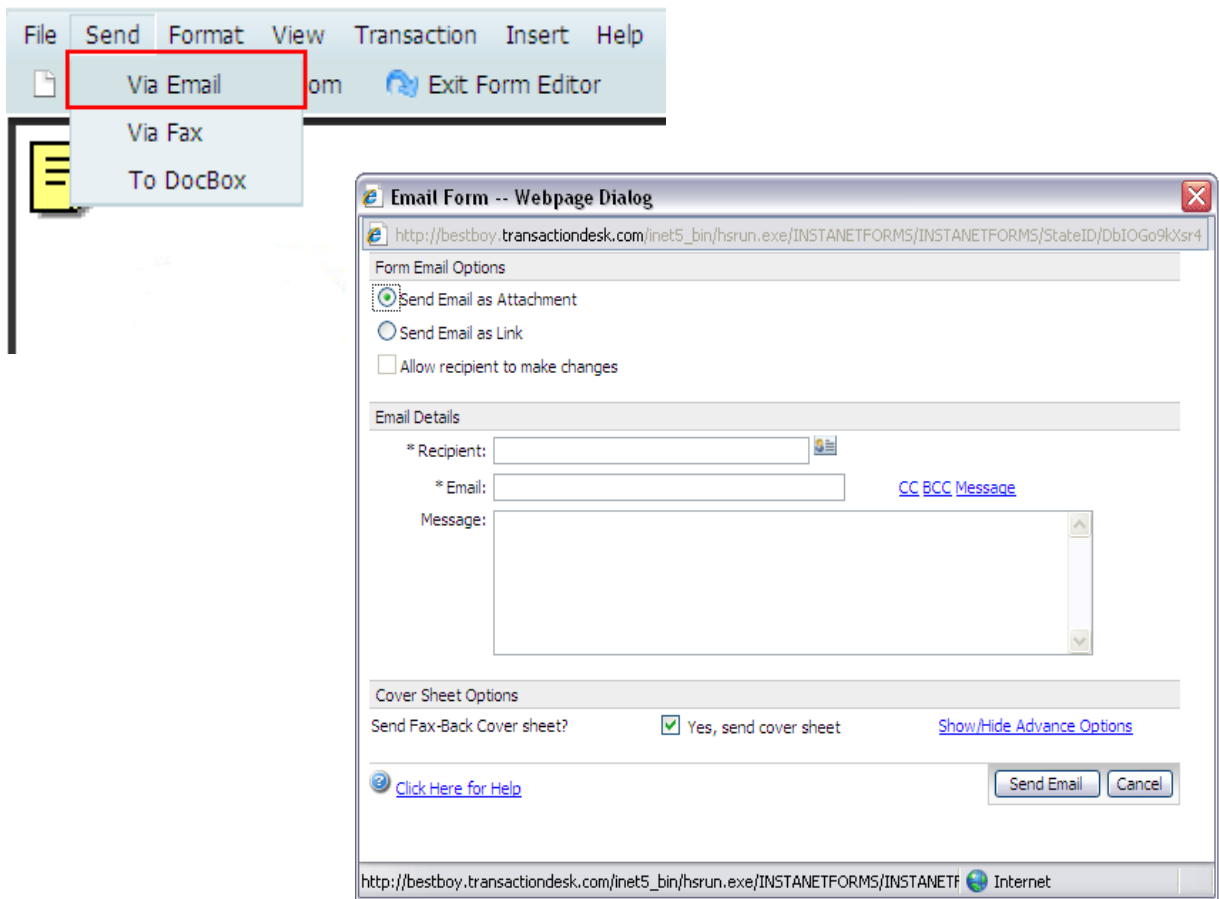
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Send >> Via Email

'Via Email' emails the form in the editing screen.

Note: There are different emailing options.



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New Toolbar User Guide

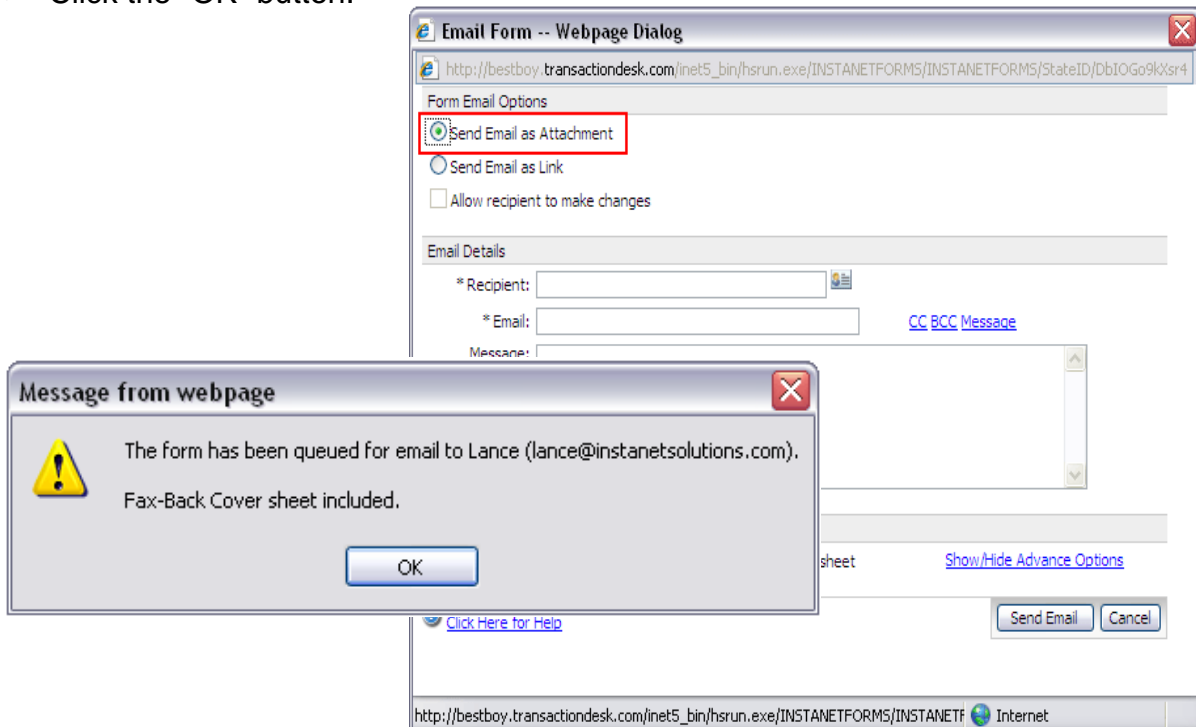
Send >> Via Email

'Via Email' emails the form in the editing screen.

'Send Email as Attachment'.

Includes the form as a PDF attachment

- Enter the recipient's name and email address.
- Add a message.
- Default is to include a Fax-Back Cover Sheet.
- Click "Send Email".
- A pop-up screen appears confirming the email.
- Click the "OK" button.



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New Toolbar User Guide

Send >> Via Email

'Via Email' emails the form in the editing screen.

- Sample Email.

Fax-Back Coversheet.pdf (93 KB) [9] - Property Inspection (08-04).pdf (103 KB)

DocBox(Documents)


Attention: Lance Campbell

You have been sent Documents from:
Name: **Nicholas Adams**
Company: **Greater Rochester Association of REALTORS**
Phone: **519-432-9115**
Fax: **519-432-6515**
Email: nick@instanetsolutions.com

Instructions:
To print a copy of the Documents:
1. Double click on the attached document.
2. Select **Print** from the menu.

To save the file to your computer:
1. Right click on attached document.
2. Click **Save As** on the popup menu.
3. Select the location and click the **Save** button.
Note: See Fax-Back Cover Sheet for additional details.

Additional Details:
This email has 2 attachments - a Fax-Back Cover Sheet and 1 document files.



Nicholas Adams
Agency: Greater Rochester Association of REALTORS
Address: 930 East Avenue
Rochester, NY 14607
Phone: 519-432-9115
Fax: 519-432-6515
Email: nick@instanetsolutions.com
Website:

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New Toolbar User Guide

Send >> Via Email

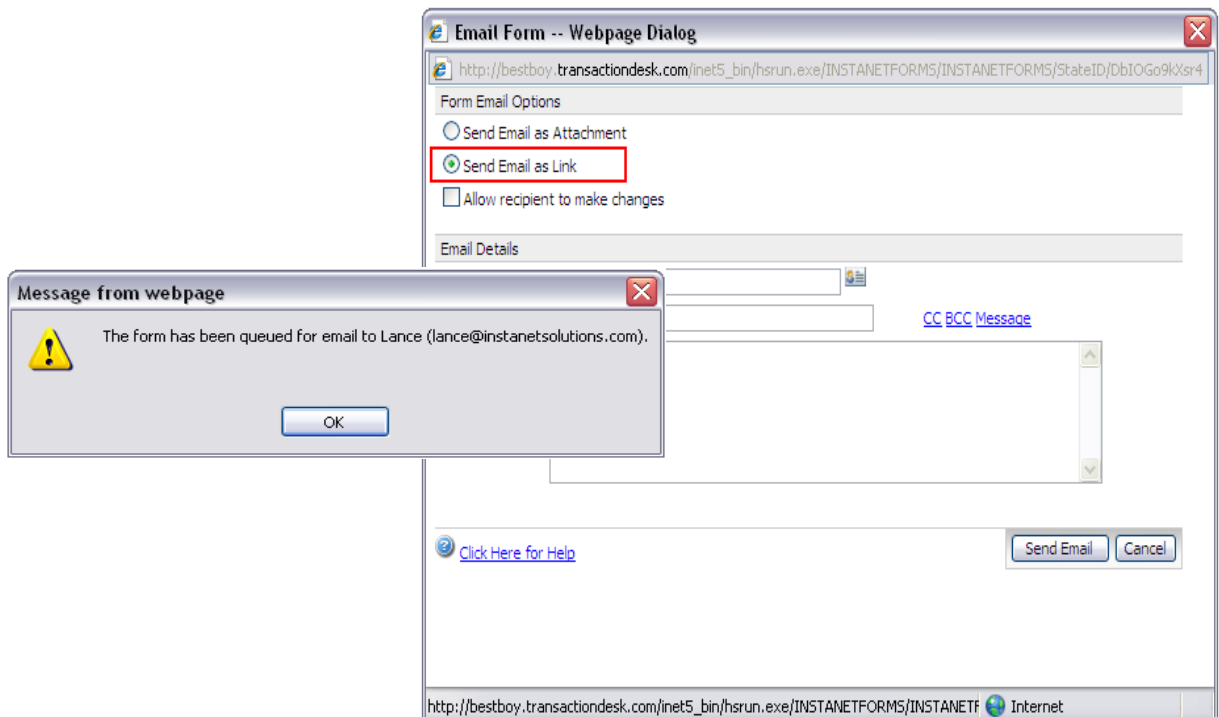
'Via Email' emails the form in the editing screen.

'Send Email as Link'.

Note: A Fax-Back Cover Sheet cannot be included.

Includes a link that will let the recipient view the form.

- Enter the recipient's name and email address.
- Add a message.
- Click "Send Email".
- A pop-up screen appears confirming the email.
- Click the "OK" button.



FORMS ON-LINE GOLD

New Toolbar User Guide

Send >> Via Email

'Via Email' emails the form in the editing screen.

- Sample Email.

DocBox Form Invitation Sent from Nicholas Adams

DocBox - (Form Invitation)

Attention: Lance Campbell

You have been sent an invitation to view a form from:

Sender: [Nicholas Adams](#)

Company: [Greater Rochester Association of REALTORS](#)

Phone: [519-432-9115](#)

Fax: [519-432-6515](#)

Email: nick@instanetsolutions.com

Instructions:

1. Click a form link below.
2. A new window will open containing the form.

Additional Details:

Click on a form link below to open the form in your browser.

1. [\[9\] - \[9\] - Property Inspection \(08-04\).pdf](#)



Nicholas Adams

Agency: [Greater Rochester Association of REALTORS](#)

Address: [930 East Avenue](#)
[Rochester, NY 14607](#)

Phone: [519-432-9115](#)

Fax: [519-432-6515](#)

Email: nick@instanetsolutions.com

Website:

FORMS ON-LINE GOLD

New Toolbar User Guide

Send >> Via Email

Recipient opens link to review the form.

Note: No changes can be made to the form.



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New Toolbar User Guide

Send >> Via Email

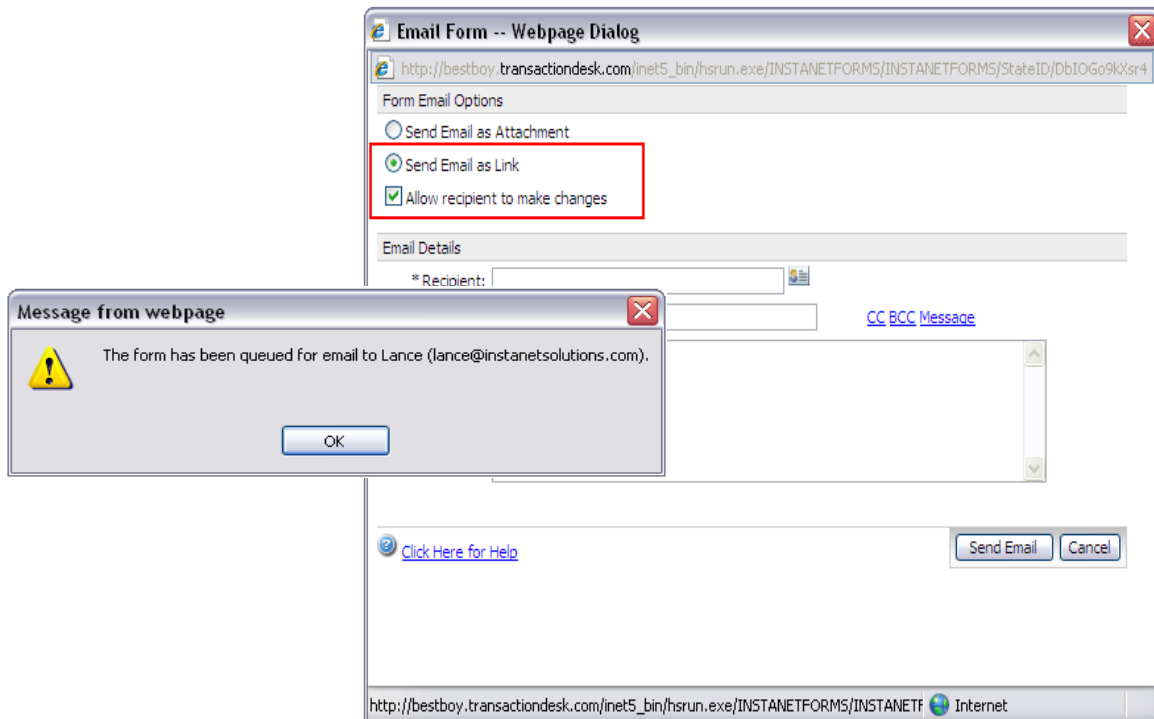
'Via Email' emails the form in the editing screen.

'Send Email as Link' & 'Allow recipient to make changes'.

Note: A Fax-Back Cover Sheet cannot be included.

Includes a link that will let the recipient make changes on the screen and return.

- Enter the recipient's name and email address.
- Add a message.
- Click "Send Email".
- A pop-up screen appears confirming the email.
- Click the "OK" button.



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New Toolbar User Guide

Send >> Via Email

'Via Email' emails the form in the editing screen.

- Sample Email.

DocBox Form Invitation Sent from Nicholas Adams

DocBox - (Form Invitation)

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1. Click a form link below.
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Additional Details:

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1. [\[9\] - \[9\] - Property Inspection \(08-04\).pdf](#)



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Website:

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New Toolbar User Guide

Send >> Via Email

Recipient opens link to review the form and makes changes.

- And then clicks the 'Save' button.

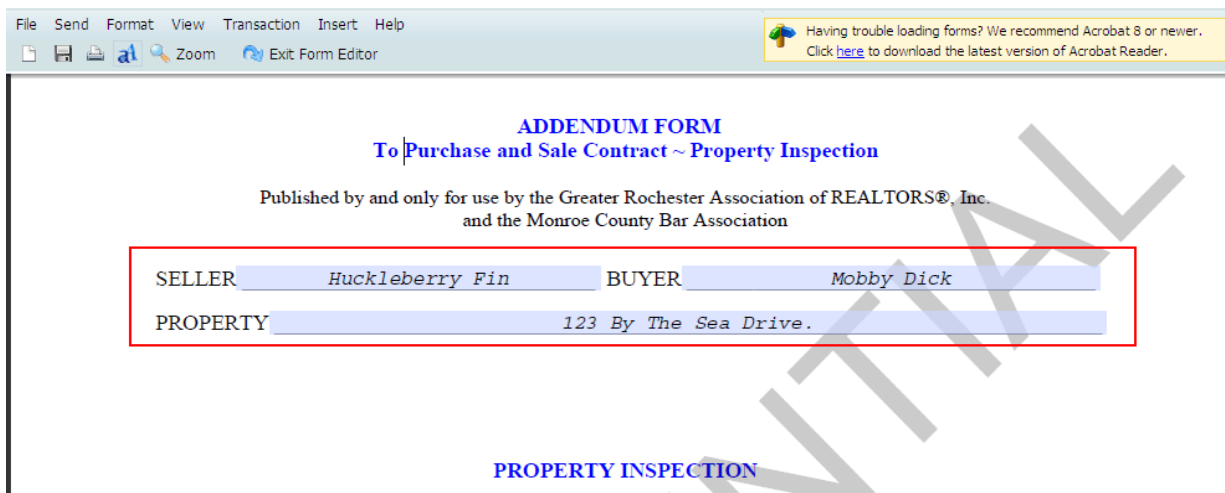


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New Toolbar User Guide

Send >> Via Email

When the user opens the form the changes are seen.



File Send Format View Transaction Insert Help

Having trouble loading forms? We recommend Acrobat 8 or newer.
Click [here](#) to download the latest version of Acrobat Reader.

ADDENDUM FORM
To Purchase and Sale Contract ~ Property Inspection

Published by and only for use by the Greater Rochester Association of REALTORS®, Inc.
and the Monroe County Bar Association

SELLER *Huckleberry Fin* BUYER *Mobby Dick*

PROPERTY *123 By The Sea Drive.*

PROPERTY INSPECTION

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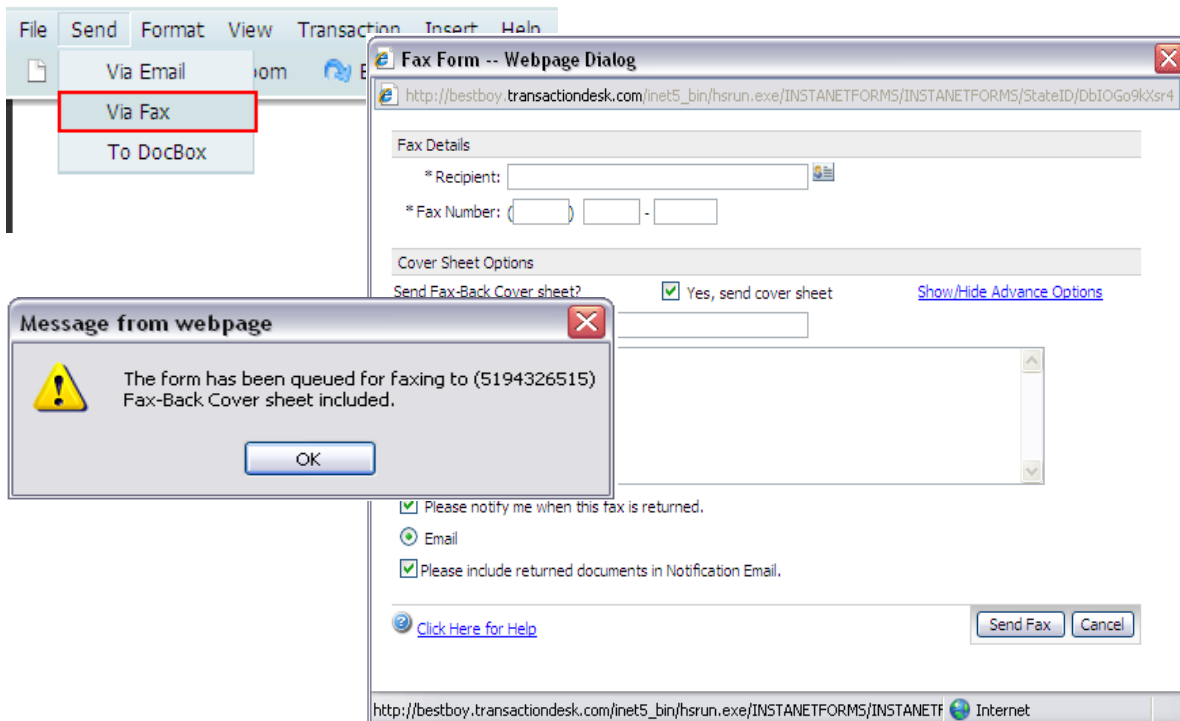
New Toolbar User Guide

Send >> Via Fax

'Via Fax' faxes the form in the editing screen.

A pop-up window opens

- Enter the appropriate information.
- Default is to include a Fax-Back Cover Sheet.
- Click "Send Fax".
- A pop-up screen appears confirming the fax.
- Click the "OK" button.

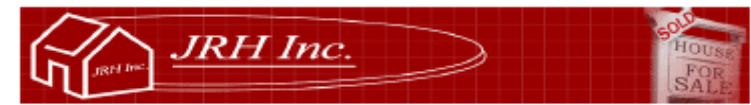


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New Toolbar User Guide


Send >> Via Fax

Sample Fax-Back Cover Sheet.



Fax-Back Cover Sheet

*This fax must be sent to 1-888-895-6524 to be processed.
If you are faxing from outside of the US, please use 1-719-434-9525.*



To verify John Smith has received your fax please visit
<https://www.transactiondesk.com/verify>
Enter the following barcode number: 92641211-2DA5-4B46-A2F9-2915DFF226D4

This TransactionDesk Cover Sheet was sent to you by:

Name : John Smith
Company : Jeremy's Office
Phone :
Fax :
Email :

Instructions / Message:

Instructions:
1. Place this page as the first page of your fax message.
2. This Cover Sheet is used to return the document via fax to the person above.
3. Once the fax is received the person above will be alerted immediately that you have sent the fax.
4. A copy of the fax may also be emailed to the person above.
5. If your fax machine is not clean the Cover Sheet may not be read correctly and the returned fax may not be received.
6. The fax machine should not use photo mode when sending.

This fax must be sent to 1-888-895-6524 to be processed.
This cover sheet was generated by the TransactionDesk service - www.transactiondesk.com

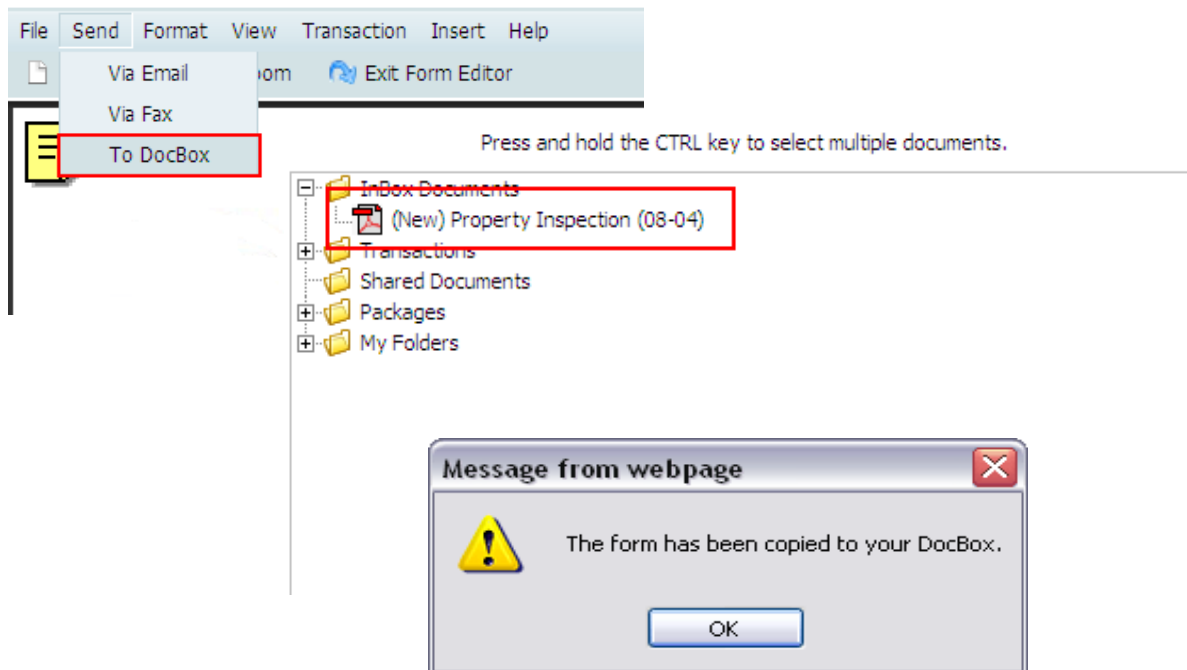
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New Toolbar User Guide

Send >> DocBox

'To DocBox' converts the selected form to a document and places it in your DocBox.

Note: Transaction Forms will be placed in the corresponding Transaction Folder.



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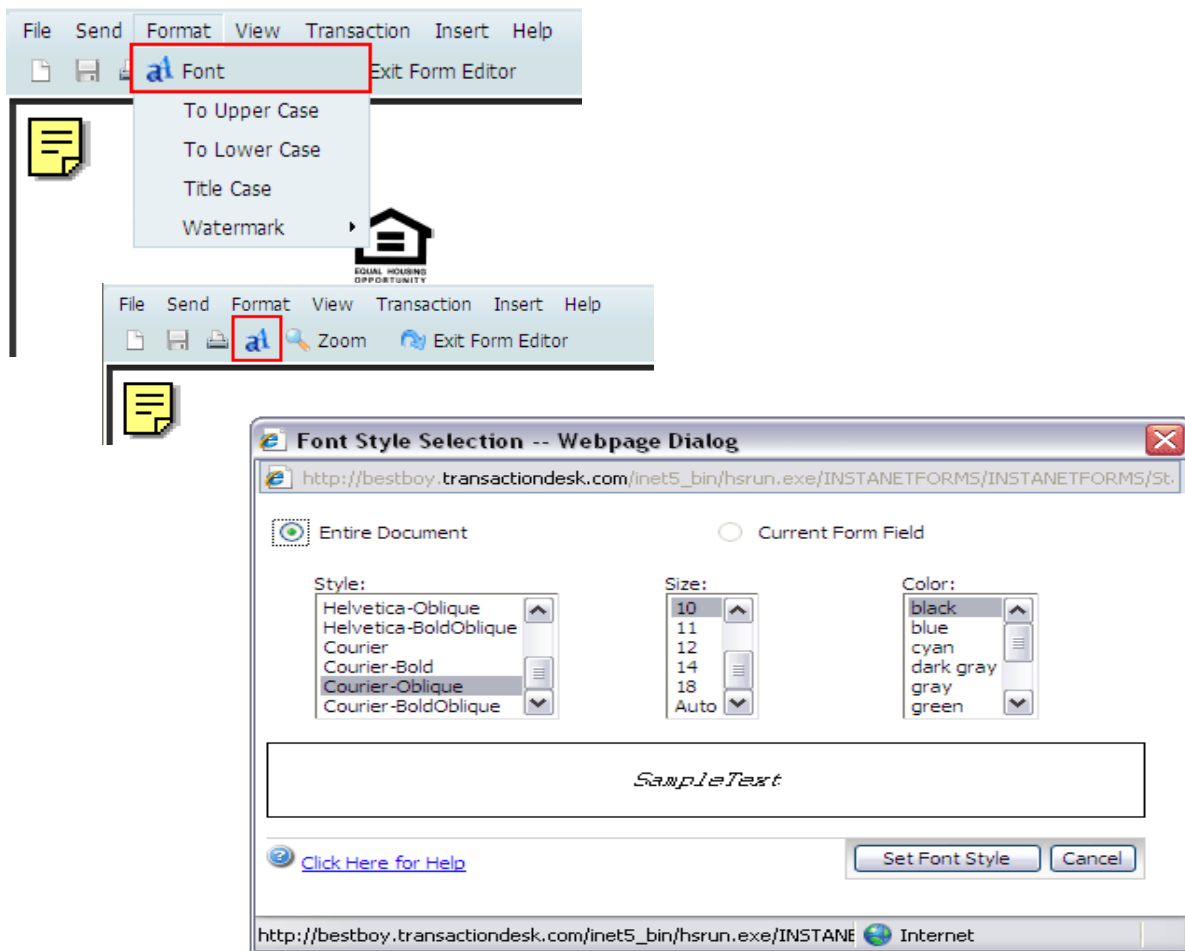
New Toolbar User Guide

Format >> Font

Allows the user to change the font in the fields.

- Available from the menu or the icon toolbar.

The font style, size and color can be changed for either every field on the form or just the current field.



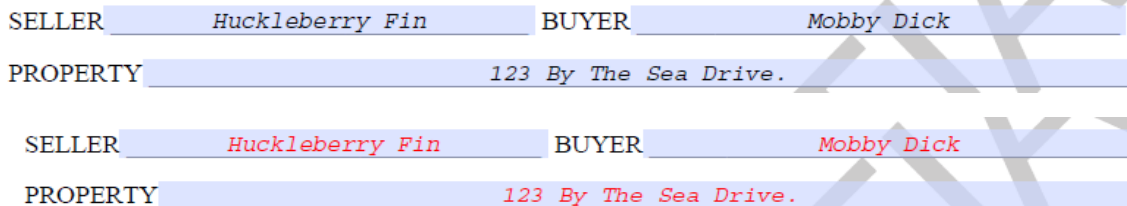
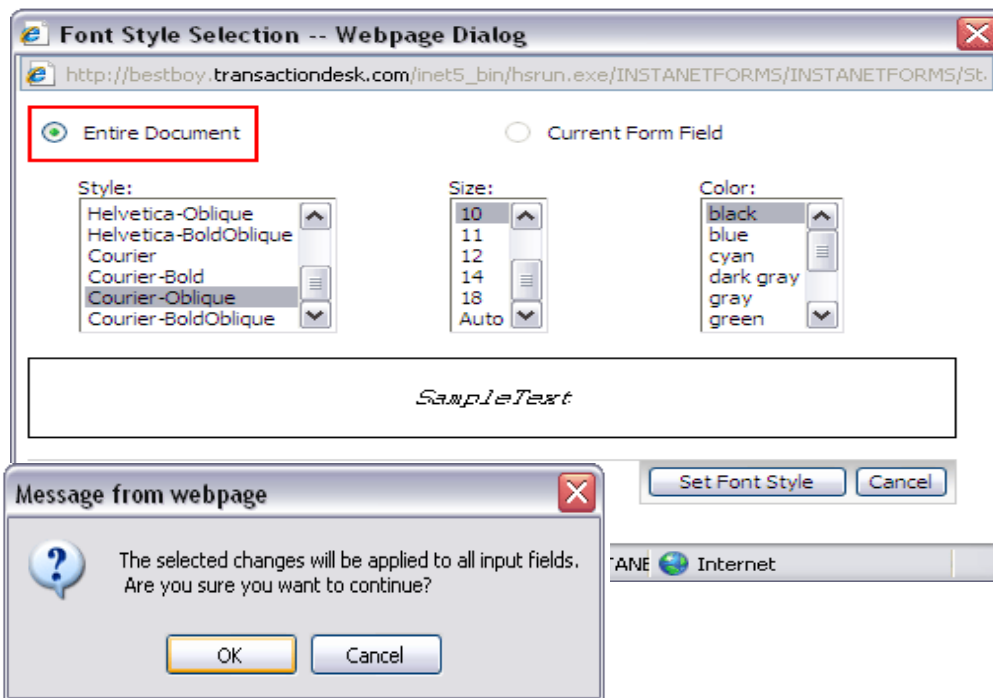
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New Toolbar User Guide

Format >> Font

Example 1:

- Changed style, size and color for entire document, click “Set Font Style”.
- Pop-up window confirms selections.
- Click the “OK” button.



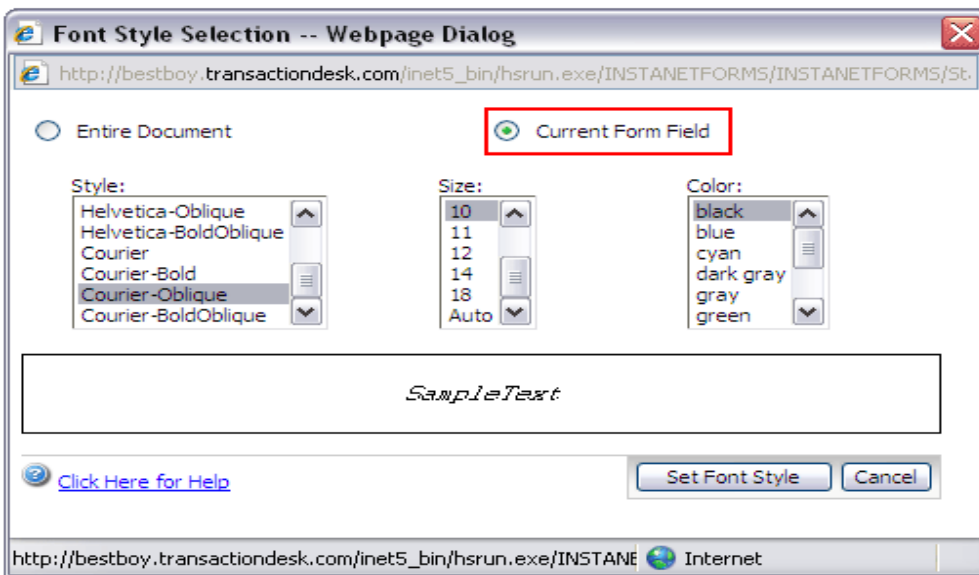
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New Toolbar User Guide

Format >> Font

Example 2:

- Changes style, size and color for a single field only.



SELLER	<i>Huckleberry Fin</i>	BUYER	<i>Moby Dick</i>
PROPERTY	<i>123 By The Sea Drive.</i>		
SELLER	<i>Huckleberry Fin</i>	BUYER	<i>Moby Dick</i>
PROPERTY	<i>123 By The Sea Drive.</i>		

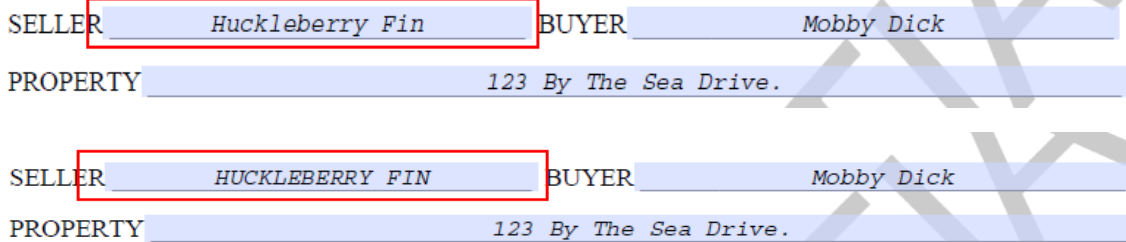
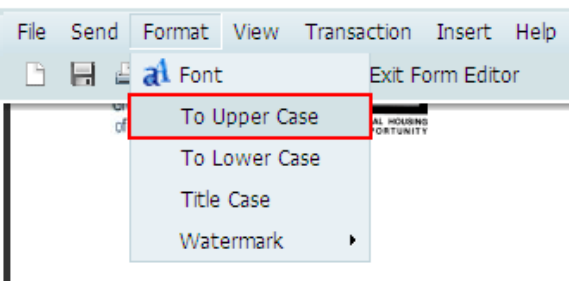
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New Toolbar User Guide

Format >> To Upper Case

Changes the font in the selected field to all upper case.

- Changes only the selected field.



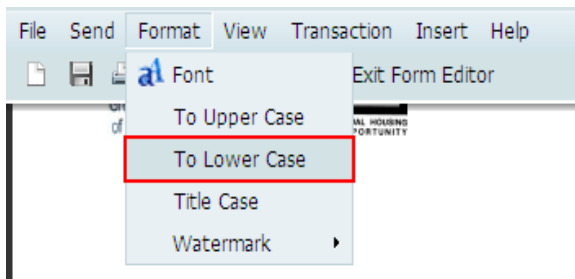
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New Toolbar User Guide

Format >> To Lower Case

Changes the font in the selected field to all lower case.

- Changes only the selected field.



SELLER BUYER
PROPERTY

SELLER BUYER
PROPERTY

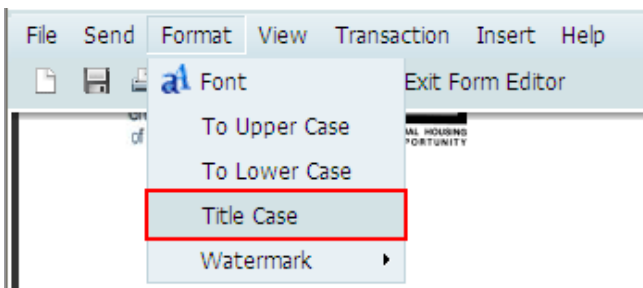
FORMS ON-LINE GOLD

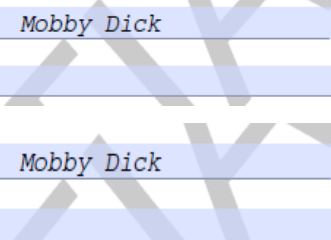
New Toolbar User Guide

Format >> To Title Case

Changes the font in the selected field to title case.

- Changes only the selected field.



SELLER BUYER
PROPERTY
SELLER BUYER
PROPERTY


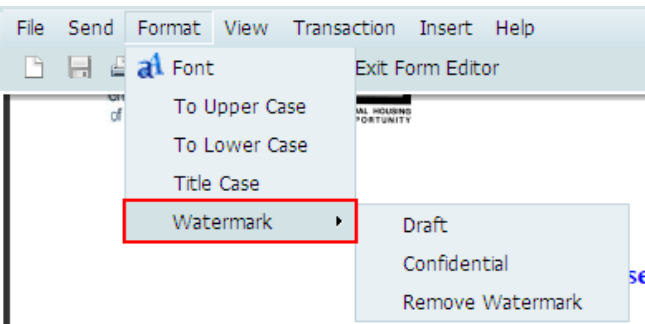
FORMS ON-LINE GOLD

New Toolbar User Guide

Format >> Watermark

Adds a watermark to the form in the editing screen :

- Draft
- Confidential
- Remove Watermark



ADDENDUM FORM
To Purchase and Sale Contract - Property Inspection

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SELLER: Huckleberry Pin BUYER: Nobby Dick

PROPERTY: 123 By The Sea Drive.

PROPERTY INSPECTION

This contract shall be contingent upon (check all that apply):

engineer's, contractor's, or home inspection service; radon; chimney; pest infestation;
 other inspection(s) to be made within _____ calendar days of the acceptance of the contract, at Buyer's expense. Seller agrees to have all utilities in service at the time of the inspection(s). If Buyer is not satisfied with the inspection report(s), within _____ calendar days after completion of all of the inspection(s), Buyer shall deliver to the Seller a written notice listing the specific deficiencies and corrections needed, together with a copy of any relevant written inspection report(s). Upon receipt of such notice, the Seller and Buyer shall have _____ calendar days to enter into a written agreement addressing the Buyer's objections. If a written agreement is not reached within the time period stated, either Buyer or Seller may cancel this contract by written notice to the other and any deposit shall be returned to the Buyer. Any work to be performed shall be completed 48 hours prior to the closing date.

If this contingency is not satisfied or waived in writing within the time period stated, then either party may cancel this contract by written notice to the other.

SELLER _____ BUYER _____

SELLER _____ BUYER _____

DATE _____ DATE _____

ADDENDUM FORM
To Purchase and Sale Contract - Property Inspection

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SELLER: Huckleberry Pin BUYER: Nobby Dick

PROPERTY: 123 By The Sea Drive.

PROPERTY INSPECTION

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engineer's, contractor's, or home inspection service; radon; chimney; pest infestation;
 other inspection(s) to be made within _____ calendar days of the acceptance of the contract, at Buyer's expense. Seller agrees to have all utilities in service at the time of the inspection(s). If Buyer is not satisfied with the inspection report(s), within _____ calendar days after completion of all of the inspection(s), Buyer shall deliver to the Seller a written notice listing the specific deficiencies and corrections needed, together with a copy of any relevant written inspection report(s). Upon receipt of such notice, the Seller and Buyer shall have _____ calendar days to enter into a written agreement addressing the Buyer's objections. If a written agreement is not reached within the time period stated, either Buyer or Seller may cancel this contract by written notice to the other and any deposit shall be returned to the Buyer. Any work to be performed shall be completed 48 hours prior to the closing date.

If this contingency is not satisfied or waived in writing within the time period stated, then either party may cancel this contract by written notice to the other.

SELLER _____ BUYER _____

SELLER _____ BUYER _____

DATE _____ DATE _____

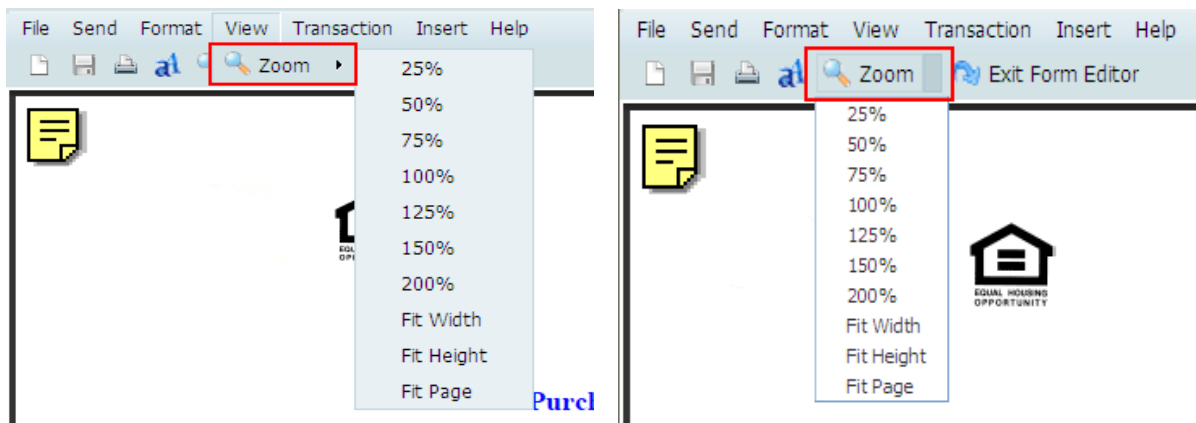
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New Toolbar User Guide

View >> Zoom

Adjusts the size of the form in the editing screen.

- Available from the menu or the icon toolbar.



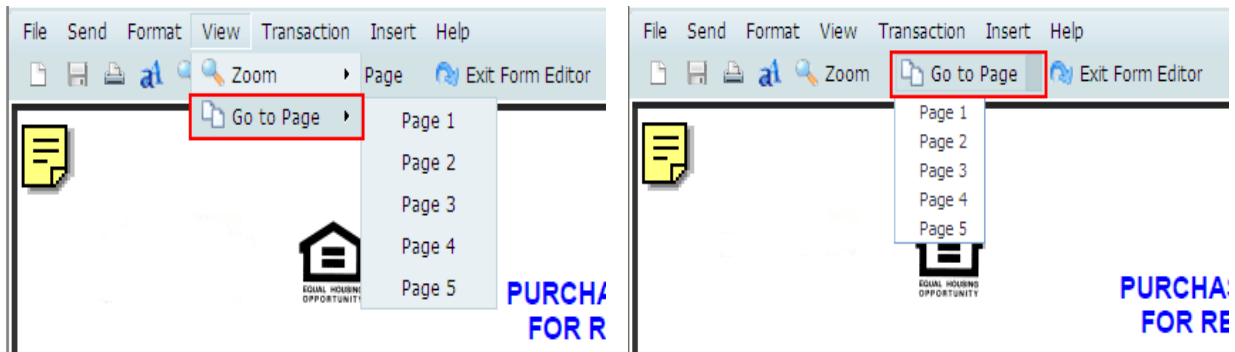
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New Toolbar User Guide

View >> Go To Page

Moves to another page in the form.

- Available from the menu or the icon toolbar.
- This is helpful for multi-page forms.



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New Toolbar User Guide

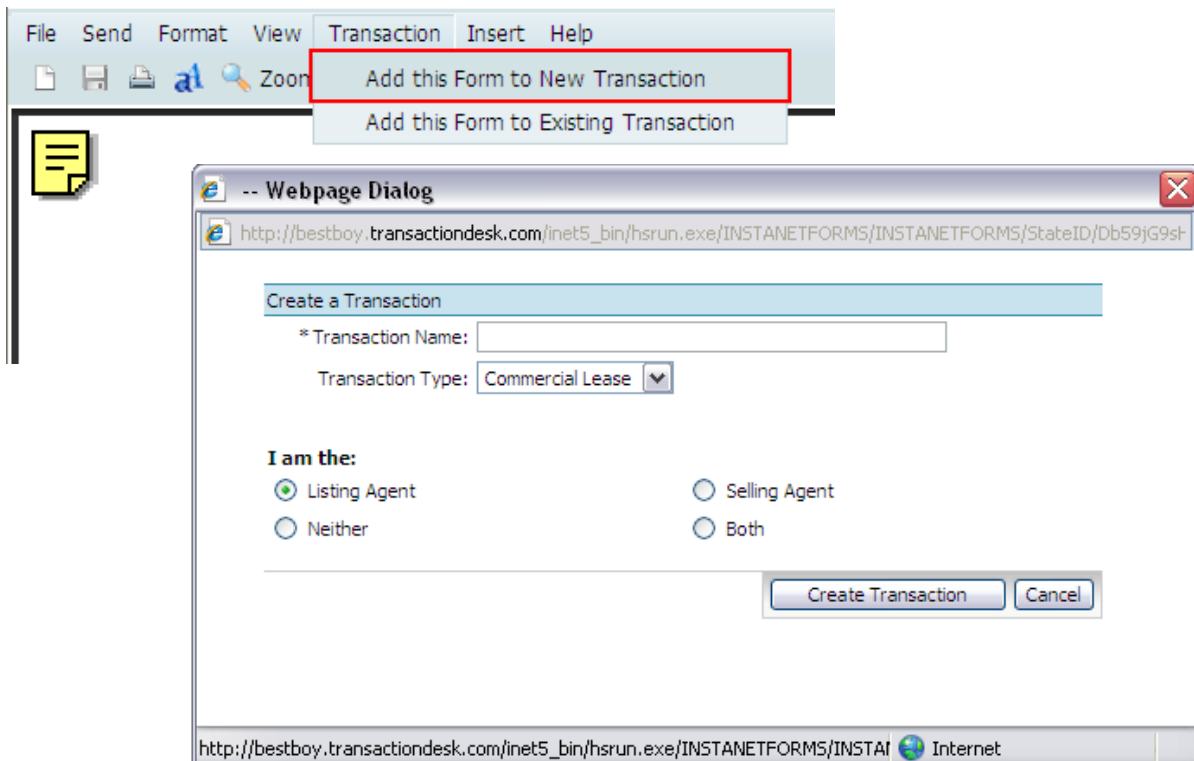
Transaction >> New

Creates a new Transaction and attaches the form.

- Enter the new transaction's name.
- Select a transaction type.
- Click the "Create Transaction" button.

The transaction will now be created and the form will reload in the new transaction.

Note: This option is only available to forms not already in a Transaction.



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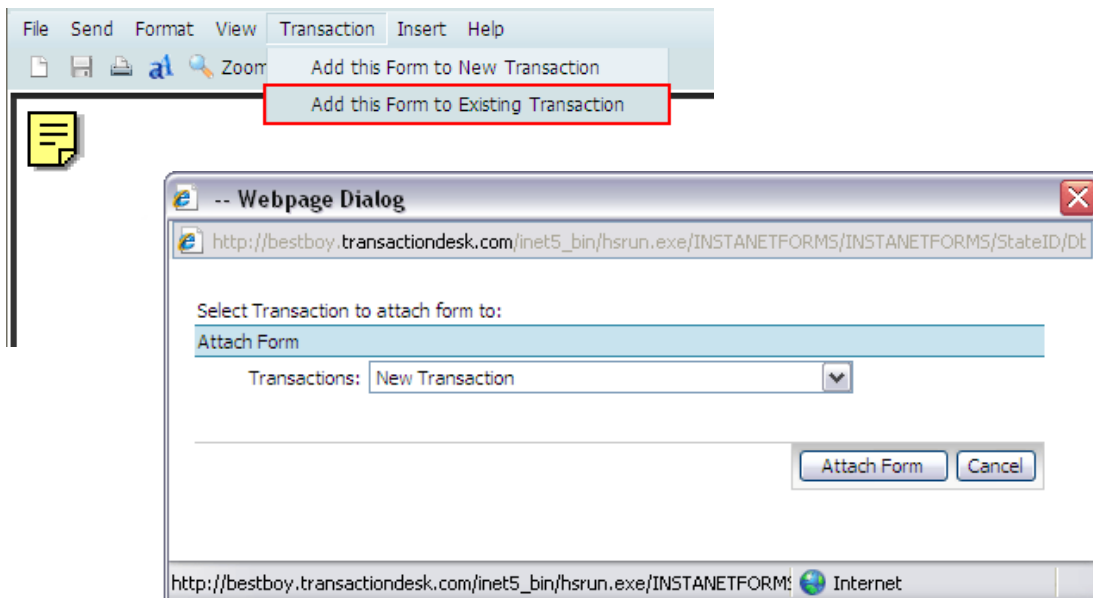
Transaction >> Existing

Attaches the form to an existing Transaction.

- Select the transaction from the list.
- Click the “Attach form” button.

The form will reload in the selected transaction.

Note: This option is only available to forms not already in a Transaction.



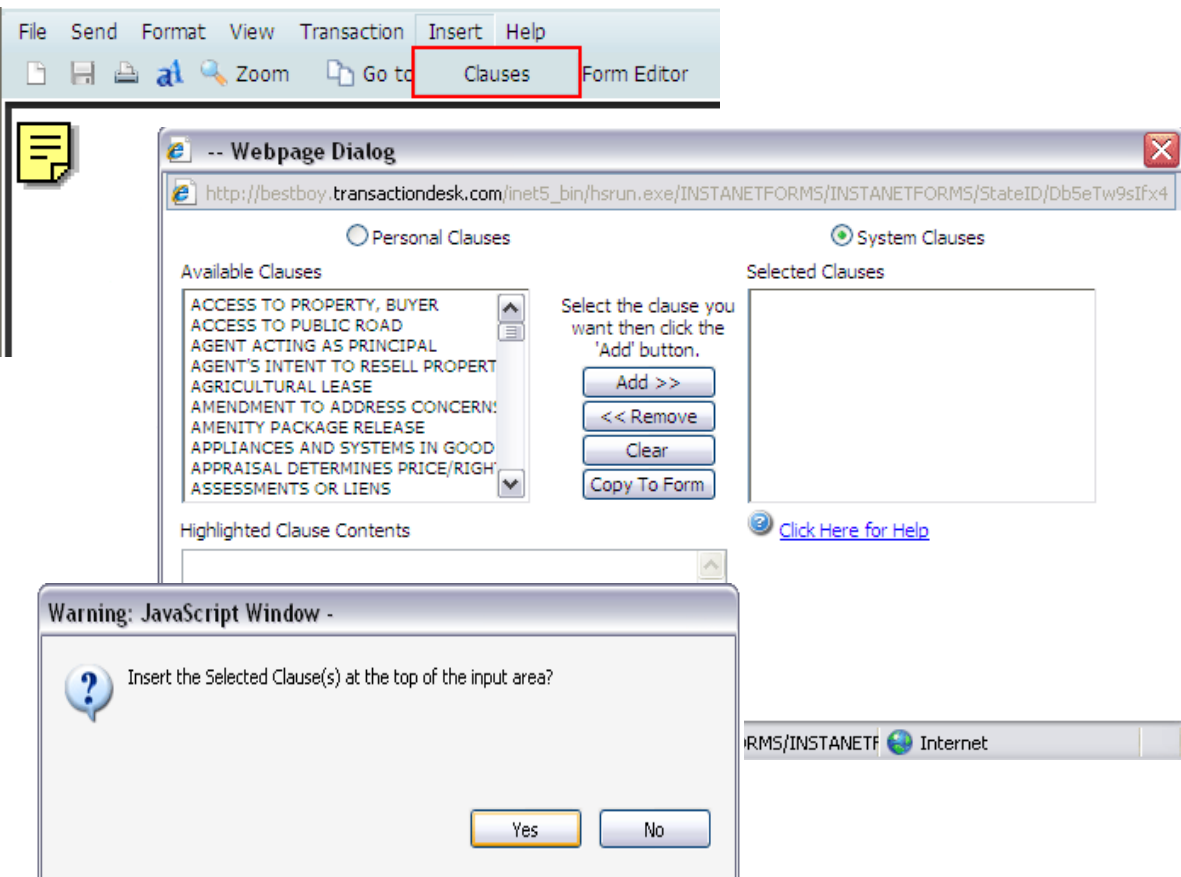
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New Toolbar User Guide

Insert >> Clauses

This feature allows the user to insert frequently used clauses.

- Clauses can be created at the office or individual level.
- Clauses are created in the Settings >> Clauses screen.



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New Toolbar User Guide

Insert >> Clauses

Step by Step

1. Select the field for the clause.
2. Select Insert >> Clauses.
3. A pop-up screen will appear with available clauses, choose either. Personal or Office clauses.
4. Select your clause by highlighting it.
5. Click the “Add >>” button.
6. The clause now shows in the selected clauses window.
7. Click the “Copy To Form” button.
8. Click “Yes” to the confirmation window.
9. The new clause is inserted in the field.

THE UNDERSIGNED BUYER AND SELLER HEREBY AGREE TO THE FOLLOWING:

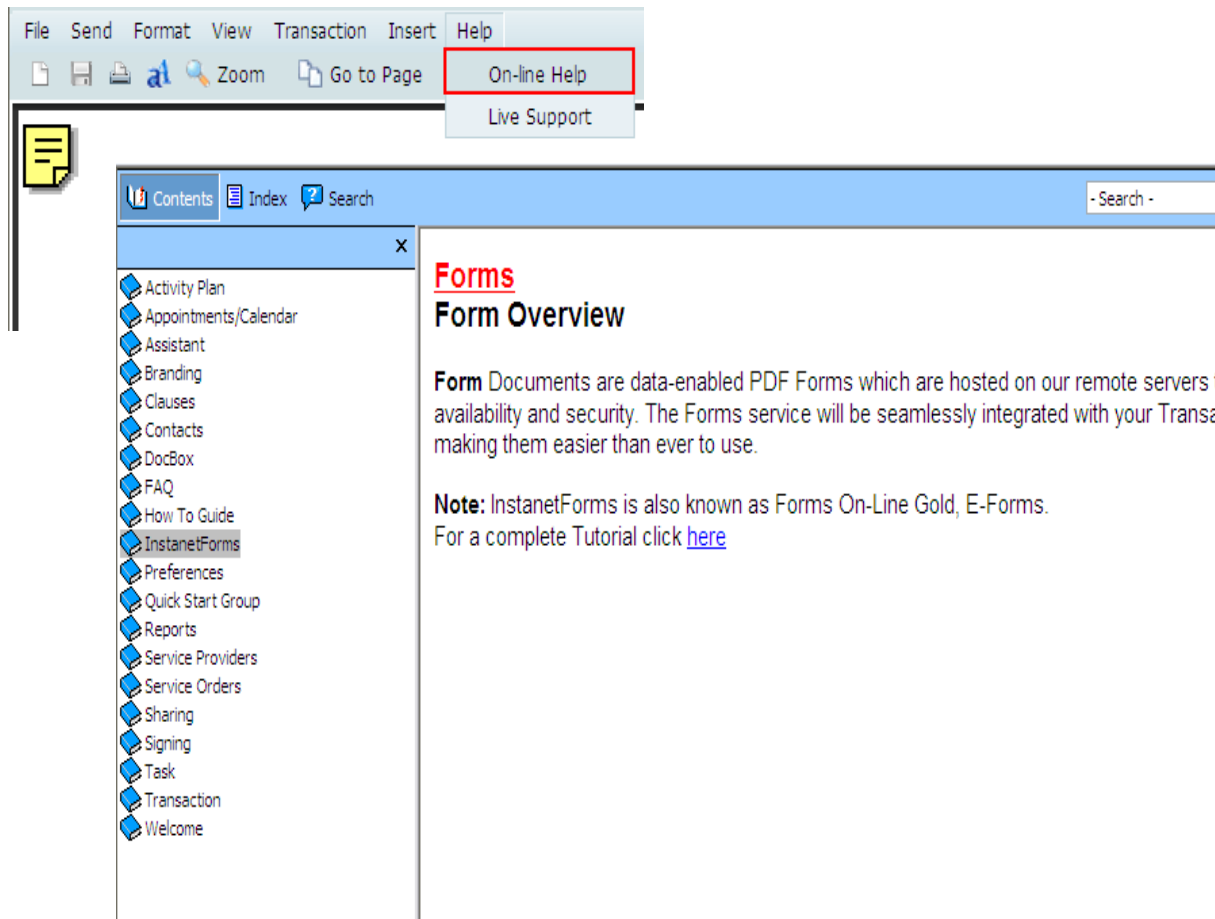
Notwithstanding any other provision in this Agreement to the contrary, Buyer and Buyer's representatives shall enter the Property for the purpose of inspecting, examining, testing, and surveying as follows:

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New Toolbar User Guide

Help >> Online Help

Selecting On-line Help opens Instanet's on-line instructions web site.



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New Toolbar User Guide

Help >> Live Support

Clicking on the 'Live Support' link will connect you to interactive online support chat.

- Monday – Friday: 9 am to 7 pm est.

