



form**simplicity**

forms. made simple. finally.

Import Export Help Guide

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Introduction

The purpose of this document is to explain the steps taken to export, save, or archive your contracts, forms, or documents from within your current forms program. Exporting your paperwork allows you to keep a backup copy for your records. If you wish to utilize the **Form Simplicity** program, we've also provided easy instructions on how to upload your exported contracts into Form Simplicity.

Exporting Documents

Forms On-line Gold:

1. Sign into **Transaction Desk**
2. Click on the **Forms On-line Gold *link*** located in the toolbar at the top of Transaction Desk.
3. Once in FOLG, you will need to browse through the folders to locate the first contract you wish to download. *Note: This must be a contract you have modified.*
4. Once you have located a contract, click on the **form name** so that it is highlighted in blue.
5. On the right-hand side of the webpage, you will see an option that states “**I Would Like To:**” with a drop-down menu that is defaulted to ‘*Add Contacts/Participants.*’
6. From that drop-down menu, select the option to “**Download Form**” and click the **GO** button.
7. A “**File Download**” window should now open. Click on the **Save** button.
8. The “**Save As**” window will appear, allowing you to choose the location of where to save the PDF file on your computer. Once you have chosen the appropriate location, click the **Save** button.
9. Repeat steps 1-8 to save the rest of your forms/contracts located in Forms On-line Gold.

Transaction Desk:

1. Log into **Transaction Desk**
2. Click on the **Transactions** link located in the toolbar at the top of Transaction Desk.
3. You should now see a list of your transactions.
4. Click on the first transaction in the list to be brought to the “Transaction Overview.”
5. Located above the Transaction Information box, in the middle of the Transaction Overview, are the words ‘**I would like to:**’ followed by a drop-down menu that is defaulted to ‘*Add Contacts/Participants.*’
6. From that drop-down menu, select the option that reads “**Archive this Transaction,**” then click the **GO** button.
7. You should now see a tan box with a message stating “*PDF File Created Successfully.*”
8. **Right-click on the link** directly below this message, then chose **Save Target As** (Internet Explorer) / **Save Link As** (FireFox)

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9. The next window that opens allows you to choose the location of where you would like the PDF file to be saved on your computer. *Hint: You may want to change the name of the file as the Transaction Desk default name is long and ambiguous.*
10. Once you have chosen the appropriate location, click the **Save** button.
11. Once the file has been saved, navigate to it, and open the .PDF file.
NOTE: *The document should open in Adobe Reader or Acrobat Standard/Professional. This document will contain all the important information related to the transaction, including all documents and contracts. On the left-hand side of Adobe, there should be a column containing a 'Table of Contents' (Adobe labels this as Bookmarks). If you browse down the list you will notice a bookmark labeled "List of Forms" with sub-bookmarks labeled "Form #1," "Form #2," and so on, depending on the number of forms associated with this particular transaction.*
12. Navigate to the first form by clicking on the **Form #1** bookmark. This will 'jump' to the page within this document that contains the first form.
13. To view and save the actual form, double-click on the small **paperclip icon** located in the middle of the page.
14. Once the form is open, click on the **File** menu located at the top-right, and choose **Save a copy** from the menu.
15. A warning message may appear stating, *"This document does not allow you to save any changes you have made to it unless you are using Adobe Acrobat 9, Adobe Acrobat Pro 9, or Adobe Acrobat Pro 9 Extended. You will only be saving a copy of the original document. Do you want to continue?"* If this message does appear, place a check in the box next to the option *"Do not show this message again"* and click the **OK** button.
16. The next window that opens will allow you to choose the location of where you would like the contract to be saved on your computer. Once you have chosen the appropriate location, click the **Save** button.
17. Repeat steps 12-16 to save the rest of the contracts within this archived transaction.
18. Repeat steps 4-17 to archive the rest of your transactions.

TrueForms/Formulator:

1. Open the **TrueForms** program
2. Click on the **File** menu option located at the top-right of the program, and select **Open Transaction**
3. When the Open window appears, click on the form/transaction you wish to open, and click the **Open** button on the bottom-left of the box
4. Once the form/transaction has opened, select the **File** menu option located at the top-right of the program & select the **"Print Form to PDF"** file option (*Note: This action does not actually print your form.*)
5. A window labeled **Select Folder to Save PDF Form File** will open allowing you to choose the location of where you would like to save the new .PDF file within your computer
6. Once you have selected your preferred location, click the **Select** button on the bottom-left of the box
7. TrueForms will then save your selected form/contract to your specified location
8. Repeat these steps for any further forms or transactions you wish to save as a .PDF file

RealFa\$T:

1. Open the **RealFa\$T** program
2. Click on the **File** menu option located at the top-right of the program
3. Select **Open Form**
4. When the “Open” window appears, click on the form/transaction you wish to open, then click the **Open** button on the bottom-left of the box
5. Once the form/transaction has opened, select the **Utilities** menu option located on the main menu bar at the top.
6. Choose: **Convert Form to PDF**
7. A window labeled **PDF Form Settings** will open allowing you to specify:
 - a. Pages to convert
 - b. Number of copies
 - c. What other options to include with the main document
8. Once you have made your specifications within this box, click the **OK** button
9. A message window will now appear stating the conversion has been completed. The location of the newly created PDF file (usually C:\RFwin\Data*username*) and the name of the file will also appear.
10. Repeat these steps for any further forms/contracts you wish to save as a .PDF file

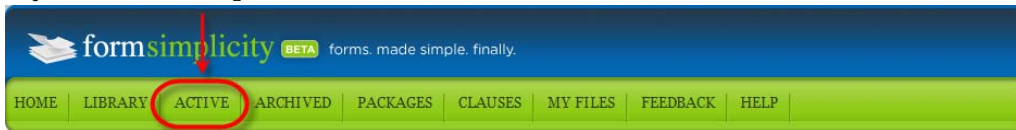
ZipForms:

1. Open the **ZipForms** program
2. Click on the **File** menu option located at the top-right of the program
3. Select **Open Transaction**
4. When the “Open Transaction” window appears, click on the form or transaction you wish to open, then click the **Open** button on the bottom-left of the box
5. Once the form/transaction has opened, select the **File** menu option located at the top-right of the program, and select the **Export to PDF...** option
6. If the transaction you have open contains multiple forms, your next step will be to select the forms you wish to have converted.
7. Once you have selected the forms for conversion, click the **OK** button
8. A “Save As” window will appear, allowing you to choose the location of where you would like the PDF file to be saved at on your computer
9. Once you have chosen the appropriate location, click the **Save** button
10. Repeat these steps for any further forms/transactions you wish to save as a .PDF file

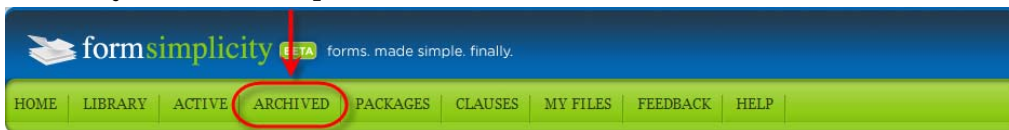
Form Simplicity:

As you integrate **Form Simplicity** into your real estate business, the amount of transactions you create and contracts you save can build up and fill your allotted complimentary storage space (50MB). To make room for new and future transactions, you may choose to either purchase more storage space or download older transactions directly to your computer. To download and store a copy of your transaction paperwork, use the following process:

1. Sign into **Form Simplicity**
2. If you wish to export an active transaction, click on the **ACTIVE** menu option...

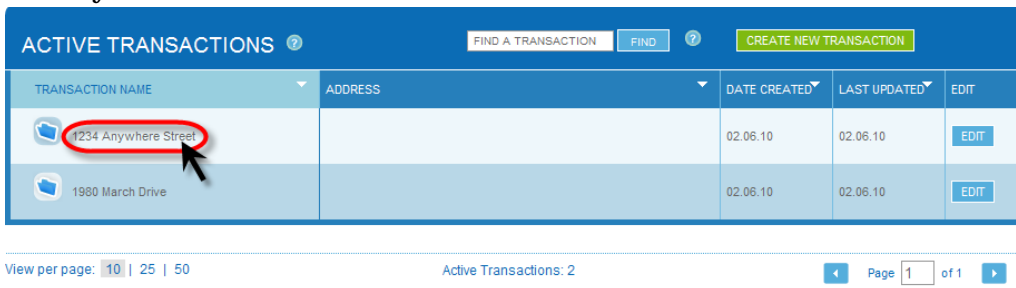


...**Or** if you wish to export an archived transaction, click on the **ARCHIVED** menu option.



NOTE: Both options are located in the green menu bar at the top of **Form Simplicity**.

3. Open the **Transaction** from which you wish to download your document(s) by clicking directly on the transaction's name...

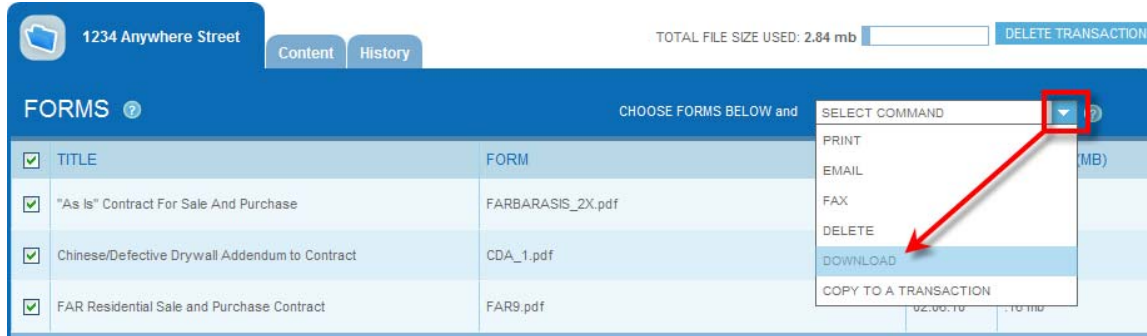


4. Select the form(s) / file(s) you wish to download by clicking the check box next to each form / file name. If you wish to download ALL Forms & Files, you may click the upper-most check box to select all of the Forms & Files. (see arrows)

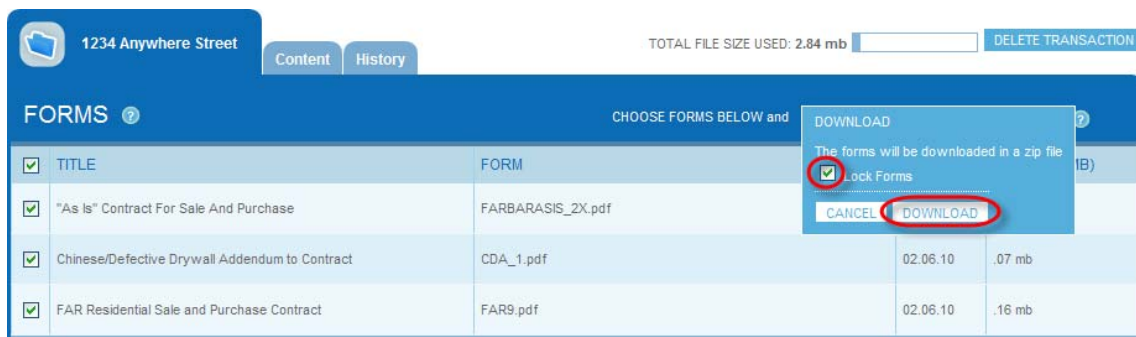


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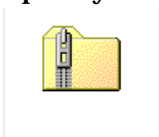
- Open the **“Select Command”** drop-down menu, located on the far right, by clicking the down-arrow. Then click on the **“DOWNLOAD”** option.



- The 'Lock Forms' check box gives you the choice to download Forms as locked or unlocked.
 - Unlocked Forms remain editable after you download them onto your computer. Any changes made to the unlocked form will not be saved by Adobe. You will have to print out the form with the new changes. Once you close the form, the new information will be discarded and replaced with the original information from when it was downloaded from Form Simplicity.
 - Locked Forms are an un-editable version of your form. This option is best for archiving purposes as the content of the document cannot be altered once it is downloaded.
- Choose your locking preference, then click the **DOWNLOAD** button to download your selected Form(s) / File(s).



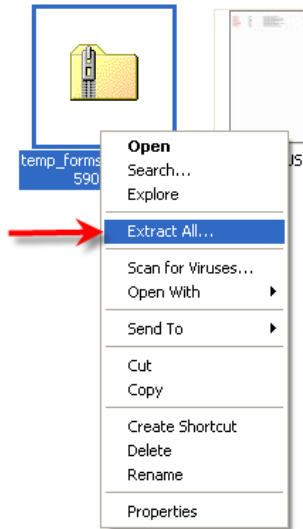
- A "File Download" window will appear. Click the **SAVE** button.
- The next window that opens will allow you to choose the location of where you would like the to save the Form(s) /File(s) on your computer. *NOTE: You may want to change the name of the file for organizational and filing purposes.*
- Once you have chosen the appropriate location on your computer, click the **Save** button. Form Simplicity saves your downloaded Form(s) /File(s) in a compressed (ZIP) folder.



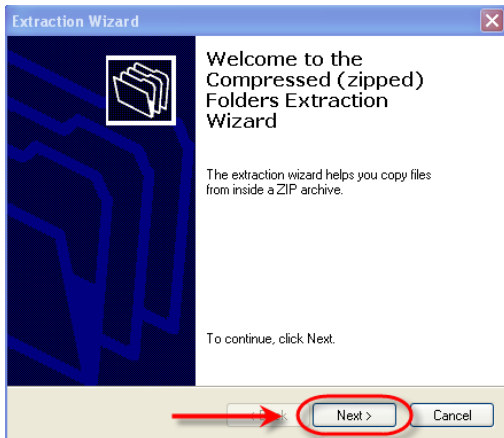
temp_forms22223021...

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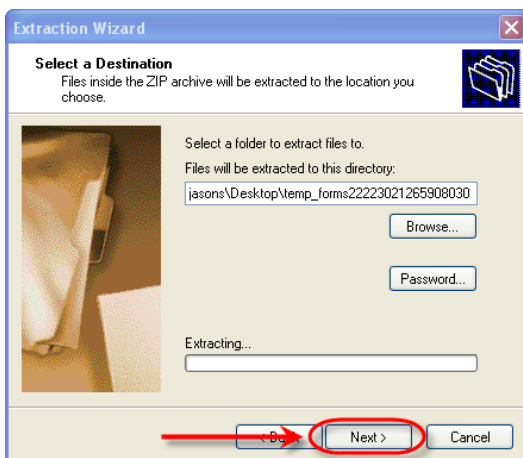
11. To 'unzip' the folder and view the Form(s) /File(s), **right-click** on the compressed file, and choose the **Extract All...** option from the menu.



12. The "Windows Extraction Wizard" should open. Click **Next** to continue.

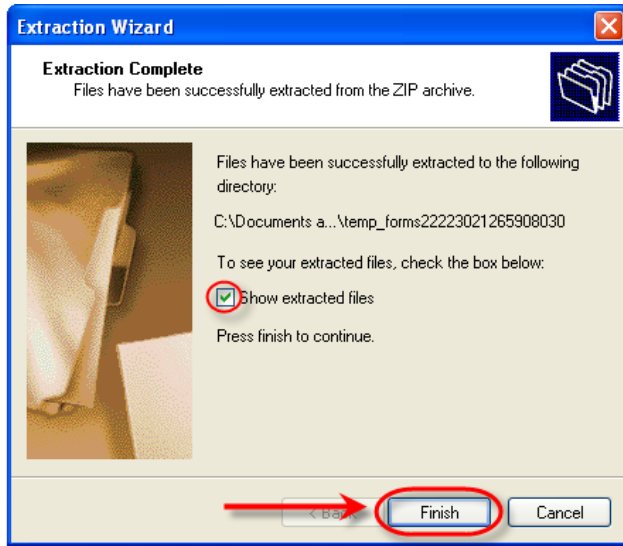


13. The next step allows you to choose the location of where you would like the Extraction Wizard to save the 'unzipped' folder. It will usually default to the location of the original compressed folder. Click **NEXT** to continue.



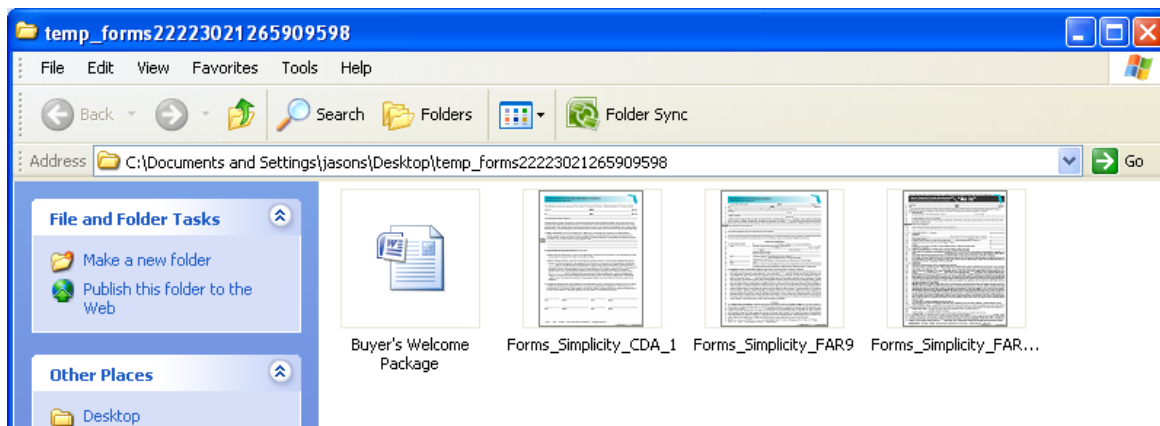
[Continued]

14. You should now have both the compressed folder and the uncompressed folder saved onto your computer. Keep the *'Show extracted files'* box checked and click the **Finish** button.



temp_forms22223021... temp_forms22223021...

15. A window should now open displaying the Form(s) /File(s) you have chosen to download.



Exporting Contacts into MS Outlook

Transaction Desk

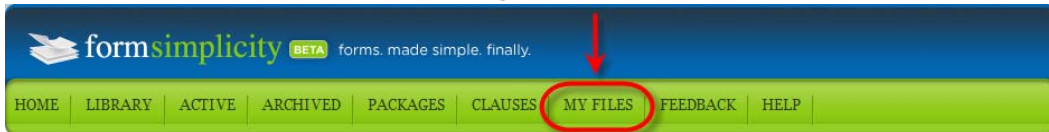
1. Sign into **Transaction Desk**
2. Click on the **Contacts** link located in the toolbar at the top of Transaction Desk.
3. Located right above your list of contacts is a drop-down menu. From that menu, choose the **“Import/Export Utility”** option, then click **GO**.
4. On the next page, **click the box** to *“Accept and Agree to the conditions outlined.”*
5. An “Application Run – Security Warning” window should now open asking your permission to run the Import/Export Utility application. Click the **Run** button.
6. The “Transaction Desk Import/Export MS Outlook Contact Utility” window should now open. Click on the tab titled **“Export Contacts from TransactionDesk to Outlook”** at the top of the window.
7. If no contacts appear in the list, click the **Reload Contact List** button at the bottom.
8. Once your list of contacts populates, place a check mark in the box next to each contact you wish to export. You may click the **“Select All”** button at the bottom if you wish to export all of your contacts.
9. Once you have all of your contacts selected, click **Export Contact(s) to Outlook**.
10. Verify that your contacts have been successfully imported into Outlook

Importing Documents/Files

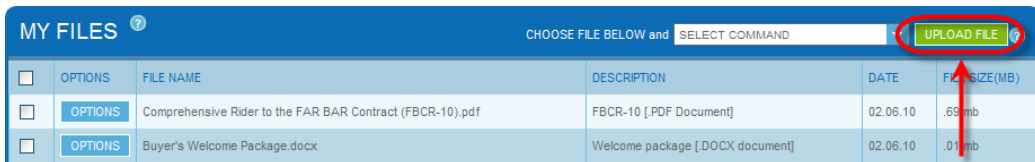
Form Simplicity

Documents and files that aren't associated with a particular transaction can be stored in the 'My Files' section of Form Simplicity. This is a good place to store a backup of your contacts, generic marketing collateral, blank checklists and other important information or paperwork you want to have access to from any computer via the Form Simplicity site.

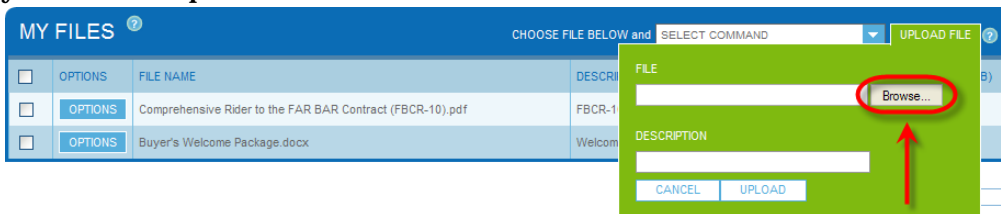
1. Log into **Form Simplicity**
2. Click the **MY FILES** option in the green menu bar at the top of Form Simplicity.



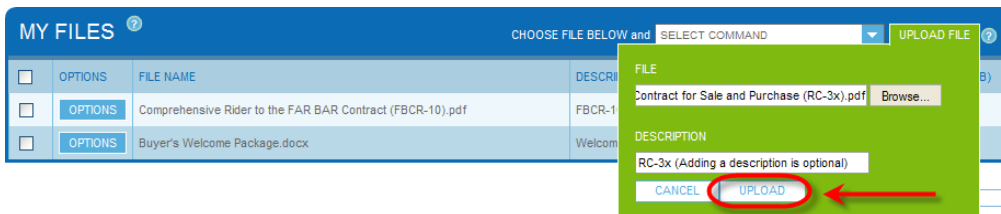
3. Click the green **UPLOAD FILE** button located towards the middle, left-hand side of the website.



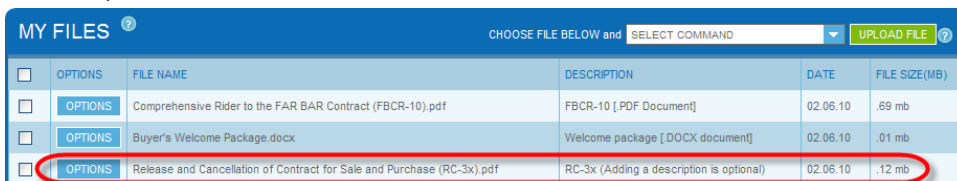
4. The **UPLOAD FILE** button should have expanded, allowing you to search your PC for the file(s) you wish to upload. To do so, click the **Browse** button.



5. The "Choose File" window will appear, allowing you to browse your computer for the document you wish to load.
6. Once you have selected the document on your computer, click the **Open** button.
7. You may enter a description of the form in the *DESCRIPTION* text box (not required).
8. Click **UPLOAD**.



9. Your document should now have uploaded into Form Simplicity. (Upload time may depend on file size)

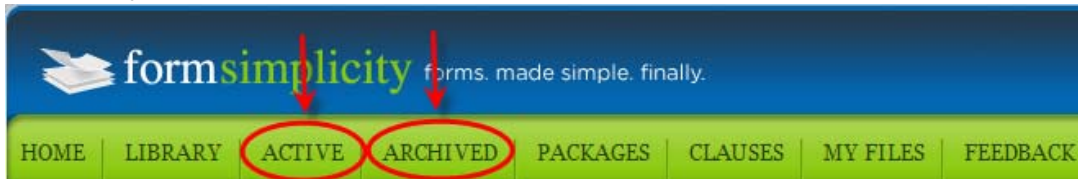


Uploading into Transactions

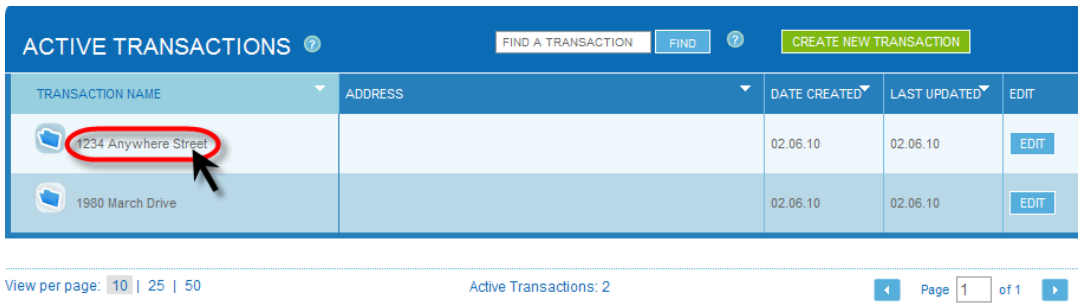
Form Simplicity

Documents can be added to the files section of Active or Archived transactions at any time, thus helping to keep all your important transaction paperwork in one place.

1. Log into **Form Simplicity**.
2. Click on the **ACTIVE** or **ARCHIVED** option in the green menu bar at the top of Form Simplicity.



3. Open the transaction to which you wish to upload your file(s) by clicking directly on the transaction's name.

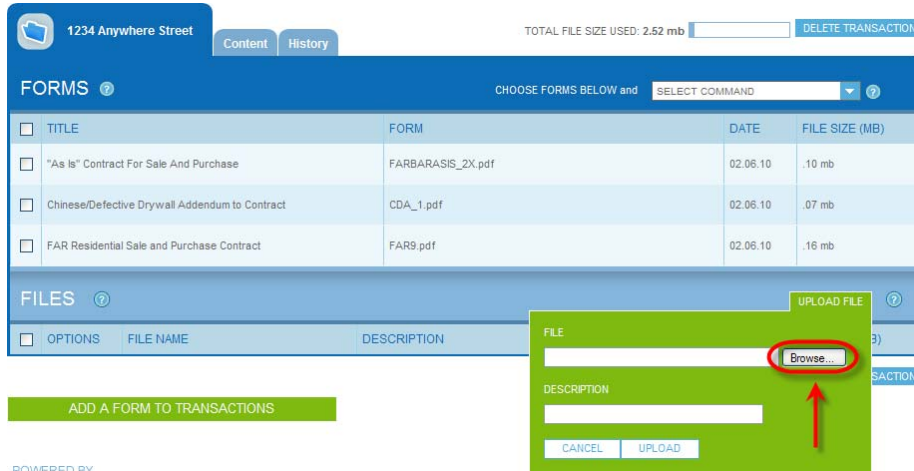


4. Click the green **UPLOAD FILE** button located below the list of forms.

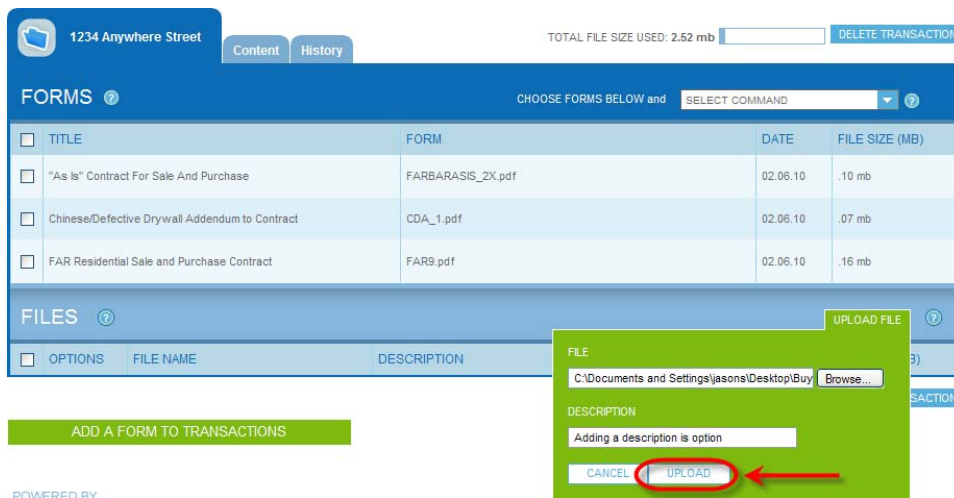


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- The **UPLOAD FILE** button should have expanded, allowing you to search your computer for the file(s) you wish to upload. To do so, click the **Browse** button.



- The **“Choose File”** window will appear, allowing you to browse your computer for the document you wish to load.
- You may enter a description of the form in the *DESCRIPTION* text box (not required)
- Click the **UPLOAD** button.



- Your document should now have uploaded into the opened transaction within Form Simplicity. (Upload time may depend on file size)



- Repeat steps 4-8 to upload more files into your opened transaction.

Troubleshooting

Live technical support on the topics in this document is available through the Technology Helpline. For contact information and live support hours of operation, follow the steps below:

1. Log into **Form Simplicity**.
2. Click on the **HELP** tab in the green menu bar at the top of Form Simplicity.
3. On the right hand side of the Help page, you can access contact information for live support from the Technology Helpline.