TEMPO with Document Manager

Training Supplement

MarketLinx
Real Estate Information Technology

Updated October 2009.

Contents

Introduction

Welcome to TEMPO/Document Manager integration training.

In this session you will gain a high-level knowledge of Document Manager by learning specific tasks involved with using the integrated Document Manager/TEMPO systems.

This training workbook is a supplement to what your instructor will present during the session. It is not intended to be a complete user's guide for Document Manager. When working in the Document Manager system, you can access online help by pressing F1 on your keyboard.

⚠ Some features described in Document Manager online help may not be available to all users of the system.

Document Manager Overview

Document Manager is a web-based application that enables you to organize and share documentation involved with real estate transactions.

Document Manager features include:

- Document lists: keep all your transaction-related documents in one convenient location.
- Things To Do lists: stay organized and on track.
- Participants lists: add participants who can view and upload documents.
- Contact list: store contact information which can be imported from, or exported to, TEMPO.

Accessing Document Manager

You can open Document Manager from the following areas of TEMPO:

- The main navigation bar: select **Document Storage** from the **Transactions** menu.
- The Add/Edit property list: select the radio button next to a listing, and click **Add/Edit Document Storage** in the floating menu bar. If the listing does not have a document folder associated with it, Document Manager will create one and open the folder summary page.
- My Page: click the **Add/Edit Document Storage** link to open the edit documents page. Then enter the MLS number of the listing whose documents you want to edit, and click **Edit Documents**. If the listing does not have a document folder associated with it, Document Manager will prompt you to create one.

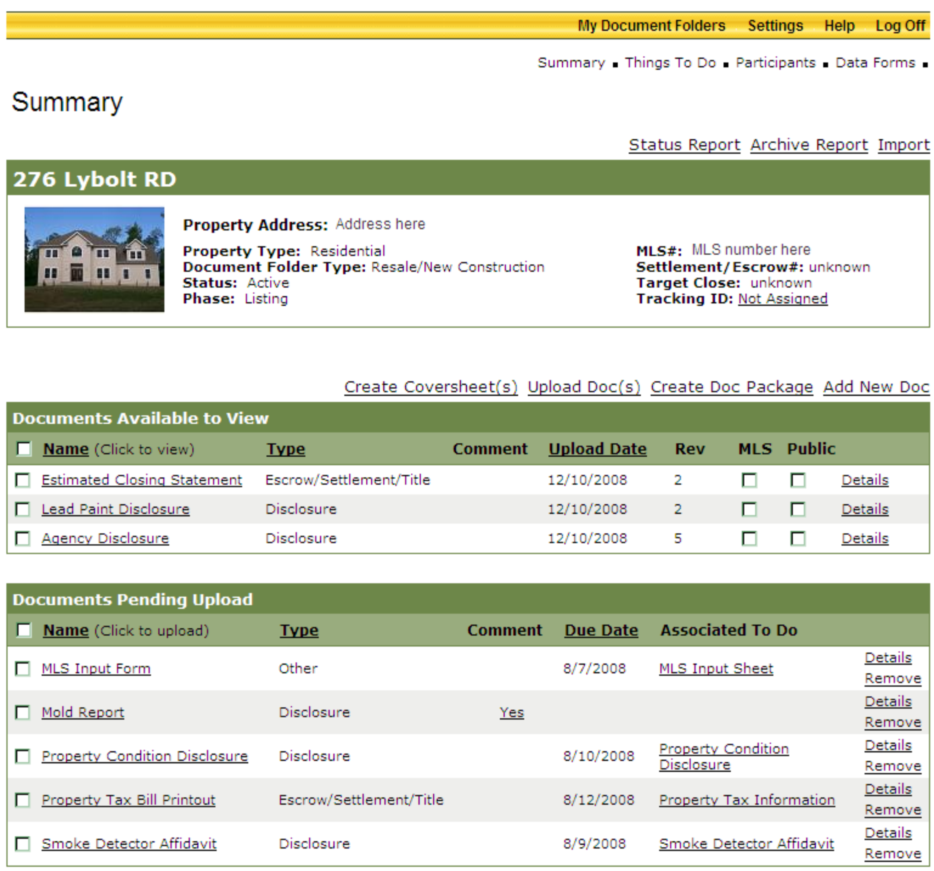
Document Manager will open in a new browser window.

Document Folders

A document folder contains the document, participant, and task lists associated with a listing.

Opening Document Folders

When you open a document folder, the Document Folder Summary screen displays summary listing information, the folder's document list, and links that enable you to complete tasks and view other areas of Document Manager.



▶ To open a document folder:

From the Document Manager home page, click the folder name link.

Listing Photos

You can upload a listing photo to a document folder. This photo will be visible to all transaction participants as well as anyone who views the folder's public document screen.

You can only upload one photo for a document folder. Uploaded photos can be a maximum of 600 pixels high by 800 pixels wide, and must have a .gif, .jpeg, or .jpg file extension.

When you use the Import Listing Data feature, Document Manager will automatically import the listing photo as well.

▶ To upload a listing photo:

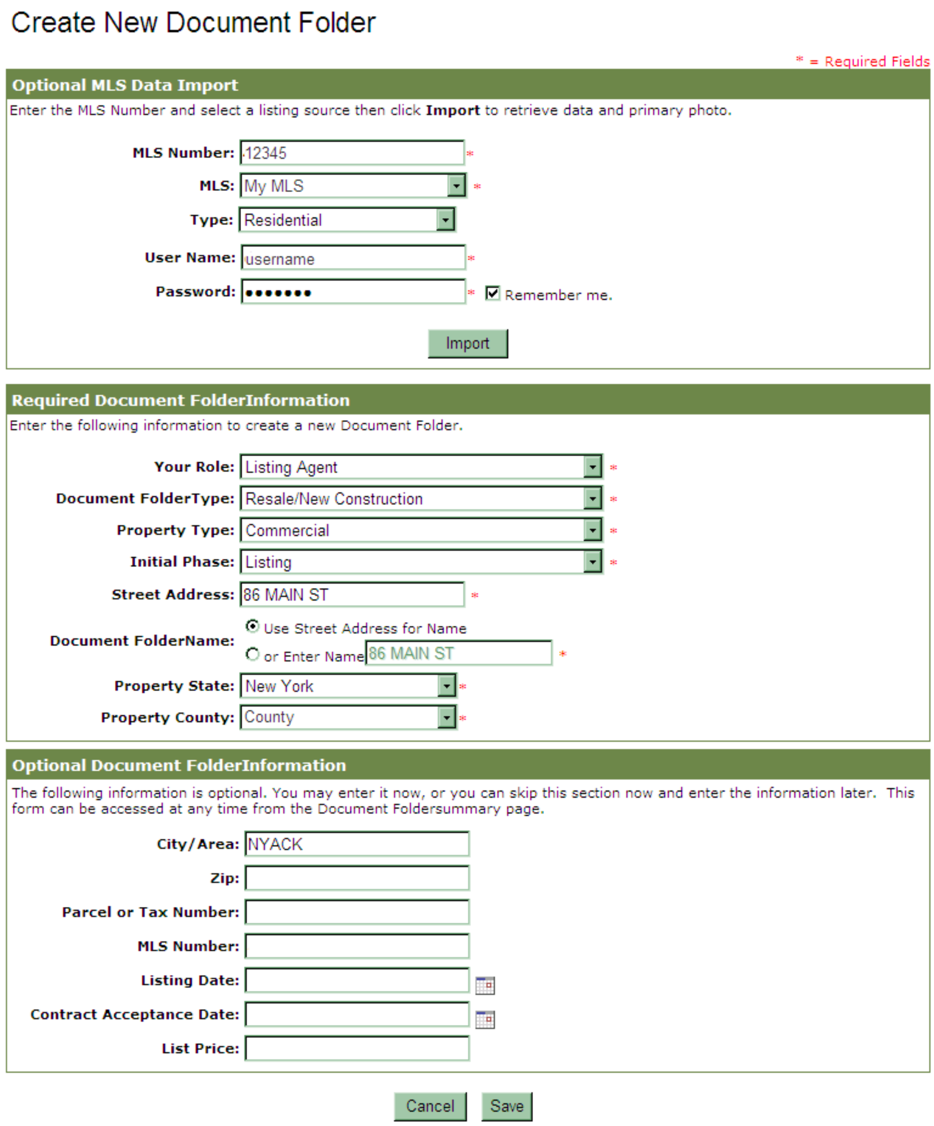
1. From the Document Folder Summary screen, click the current photo (or the photo placeholder [

]). The upload file dialog opens in a new browser window.
2. Click the **Browse** button and use the Choose file dialog to locate the photo on your computer.
3. Click the **Upload** button to upload the photo.

Creating a New Document Folder

▶ To create a new document folder:

1. From the Document Manager home page, click **Create a New Document** to open the New Document Folder form:



2. Import listing data and photo (optional):
   2.1. Type the MLS number in the **MLS Number** text box.
   2.2. Select your MLS from the **MLS** menu.
   2.3. Click the **Import** button.
3. Complete the required information section of the form.
4. Complete the optional information section of the form, if desired.
5. Create the folder:

- Click **Save and Add To Dos** to create the folder and automatically add Things To Do items (based on the folder's phase).
- Click **Save** to create the folder without adding Things To Do items.

The new folder's summary screen opens, and you are prompted to add a document.

Folder Administration

From a document folder's admin page, you can

- Change the folder's status
- Change the folder's phase
- Change the folder's name
- Transfer admin rights for the folder
- View the folder's history report

⚠ You can access a folder's admin page only if you created the folder.

▶ To open a folder's admin page:

From the folder's summary screen, click the **Admin** link.

Data Forms

Data forms contain folder-related information, such as

- MLS information
- Purchase and sale information
- Property information

▶ To add or edit folder data:

1. From the folder summary screen, click **Data Forms**. The Data Forms screen opens.
2. Click the link of the data form you want to edit.
3. Make changes to the form.
   - Click the **Additional Fields** link to add data fields to the form.
4. Click **Save**.

Documents

Viewing Documents

▶ To view a document:

From the Document Manager Folder Summary screen, click the document's Name link.

The document opens in a new browser window.

Public Documents

Documents can be either public or private: participants in a transaction can view all documents in a document folder. Non-participants can only view documents that have been marked as public.

When you e-mail a detail report for a listing, the recipient will see only public documents when he or she clicks the **Documents** link.

▶ To mark a document as public:

From the Document Manager Folder Summary screen, select the **Public** check box for the document you want to make public. To make the document private, clear the check box.

MLS Documents

MLS documents are viewable by other members of your MLS system.

When a TEMPO user clicks the **Documents** link on a listing detail report, he or she will see MLS Documents.

▶ To mark a document as an MLS document:

From the Document Manager Folder Summary Screen, select the **MLS** check box for the document you want to make viewable by other users of your MLS.

Pending Documents List

Pending documents appear in the **Documents Pending Upload** section of the Document Manager Folder Summary screen. Pending document containers are created and added to the list when you create a document-related Things To Do item, or when you select the placeholder option during the document upload process.

▶ To remove an item from the pending documents list:

Click the item's **Remove** link.

Uploading Documents

Document Manager provides three methods to upload documents to the system:

- **Direct upload**: use direct upload when you have an electronic version of the document on your computer. The maximum file size of a direct upload document is 10 MB.
- **Fax-in**: use fax-in when you have a printed version of the document you want to upload. When you select the fax-in option, Document Manager creates a cover sheet for your documents. You can use a document's cover sheet to fax in updated versions later (be sure that you use the correct cover sheet for the document) A faxed-in document must not exceed 100 pages.
- **Upload request**: use upload request when another participant has a copy of the document, but you do not. This method enables you to send an e-mail to one or more participants, requesting that they upload the document.

▶ To upload a document:

1. Open the Add a New Document form by clicking
   - The **Add New Doc** link on the Document Manager Folder Summary screen
   - The name link on the Document Manager Folder Summary screen (**Documents Pending Upload** section)
2. Select a document name from the **Name** menu.
   - This step is not necessary if the document is in the pending upload list.
3. Set the public and MLS document flags if necessary.
4. Select an upload method. If you are adding a new document to the documents list (rather than uploading a document from the pending uploads list), the upload request option will be replaced by a create placeholder option.
5. Complete any necessary fields on the form (these may vary, depending on the upload method).
6. Click **Next** and follow the onscreen directions to complete the upload process.

E-Mailing Documents

▶ To e-mail a document:

1. From the Document Manager Folder Summary screen, click the document's **Details** link to open the document details screen.
2. From the document details screen, click the **E-mail** link. The E-mail document screen opens in a new browser window.
3. Select an e-mail option:
   - **The System Default E-mail Program**: use the Document Manager e-mail system.
   - **Your Personal E-mail Program**: use the default e-mail application on your computer.
4. Click **Submit**.
5. Select recipients and set the subject and body text.
6. Click **Send**.

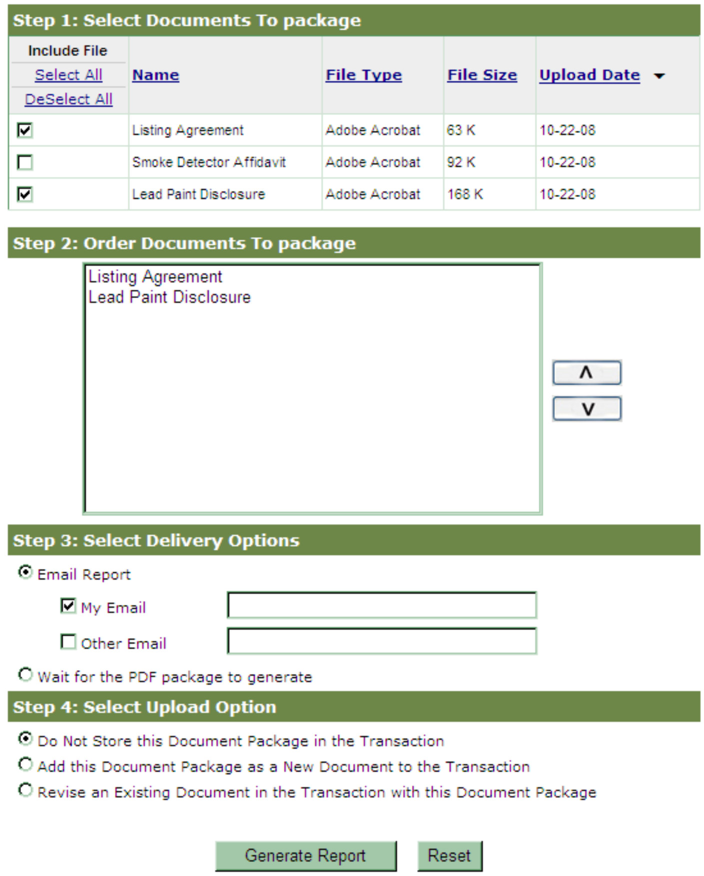
You can only e-mail one document at a time using this method. If you want to send more than one document in a single e-mail message, consider creating a document package.

Document Packages

A document package is a .pdf file that combines one or more documents.

▶ To create a document package:

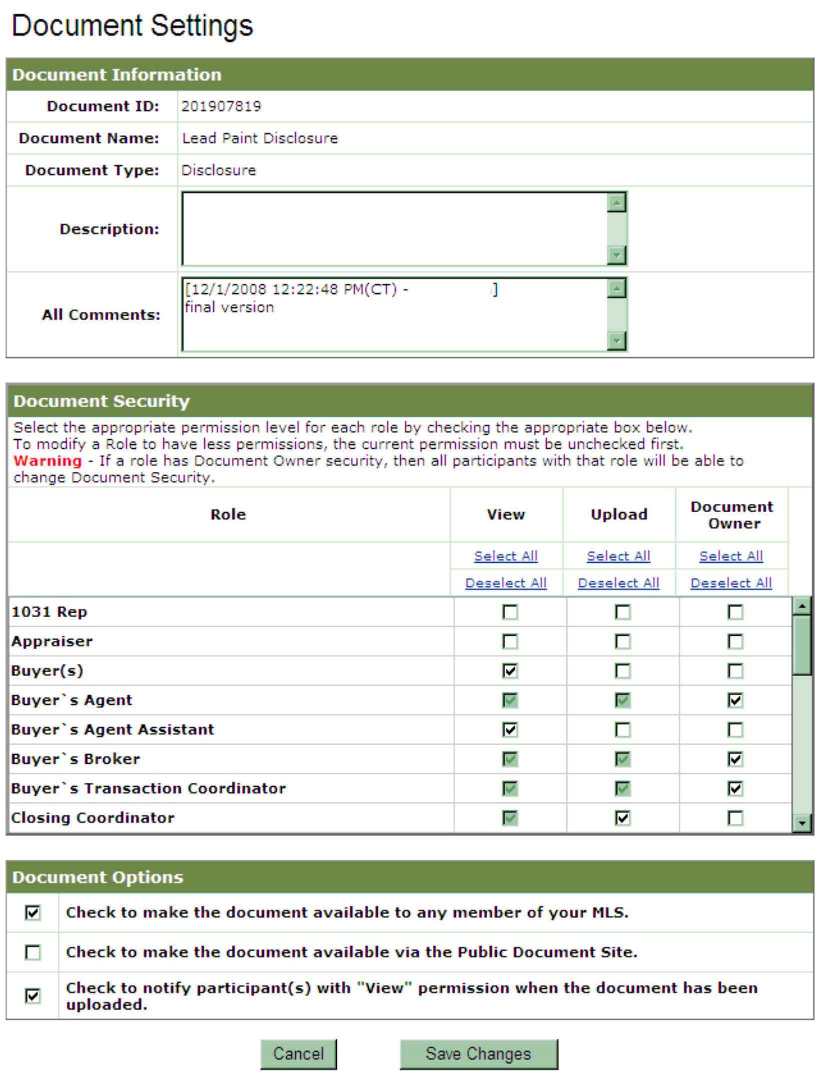
1. From the Document Manager Folder Summary screen, click the **Create Doc Package** link. The Document Package screen opens in a new browser window.



2. Select the documents to include in the package.
3. Specify the order in which the selected documents should appear.
4. Select a delivery option.
5. Select an upload option
6. Click the **Generate Report** button.

Document Settings

Document settings determine who can view and/or upload new versions of a document. You can view and change document settings from the Document Settings screen.



▶ To open the Document Settings screen:

1. From the Document Manager Folder Summary page, click a document's **Details** link to open the Document Details screen.
2. From the Document Details screen, click the **Document Settings** link to open the Document Settings screen.

Things To Do

The Things To Do List

The Things To Do List helps you organize and track the tasks associated with a transaction. When you create a folder or change its phase, Document Manager automatically populates the Things To Do List. You can add or remove items from the list at any time.

Things To Do

Printable Version Add New To Do Add From Template Edit To Do List

6 KARNELL ST — Filter By: All Items

Status	To Do Item	Dependent Upon	Category	Comments	Due Date	Completed Date	
✔	Thank You for Listing to Seller	Listing Date	For Seller		7/3/2008	7/3/2008	Details
✔	Listing Agreement	Listing Date	Required Documents		7/3/2008	10/22/2008	Details
●	MLS Input Sheet	Listing Date	Required Documents		7/3/2008		Details
●	Agency Disclosure	Listing Date	Required Documents		7/3/2008		Details
✔	Get Key	Listing Date	Listing Activities		7/3/2008	7/3/2008	Details
✔	Put sign on property	Listing Date	Listing Activities		7/4/2008	7/5/2008	Details
✔	Smoke Detector Affidavit	Listing Date	Required Documents		7/5/2008	10/22/2008	Details
✔	Take/Schedule Photos	Listing Date	Listing Activities		7/5/2008	7/5/2008	Details
✔	Lead Paint Disclosure	Listing Date	Required Documents		7/5/2008	10/22/2008	Details
✔	Upload Pictures	Listing Date	Listing Activities		7/6/2008	7/5/2008	Details
✔	Schedule Office Caravan	Listing Date	Marketing		7/6/2008	7/8/2008	Details
●	Property Condition Disclosure	Listing Date	Required Documents		7/6/2008		Details
✔	Just Listed! card to neighborhood	Listing Date	Marketing		7/8/2008	7/8/2008	Details
✔	Schedule Open House	Listing Date	Marketing		7/8/2008	7/8/2008	Details
●	Property Tax Information	Listing Date	Required Documents		7/8/2008		Details
●	Estimated Seller`s Closing Statement	Listing Date	Required Documents		7/13/2008		Details

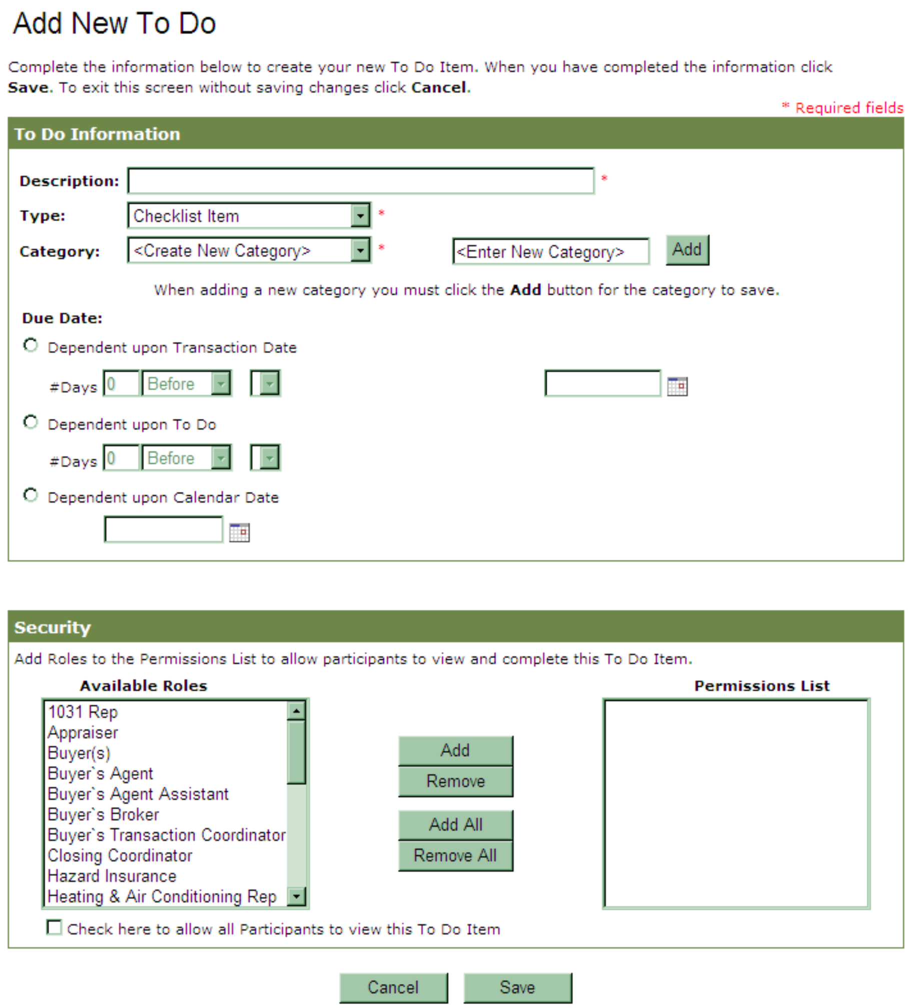
▶ To open the Things To Do List:

From the Document Manager Folder Summary screen, click the **Things To Do** link (beneath the main navigation bar).

Adding Things To Do Items

▶ To add a new Things To Do Item:

1. From the Things To Do List, click the **Add New To Do** link to open the Add New To Do screen in a new browser window.



2. Type a description for the item in the **Description** text box.
3. Select a task type from the **Type** menu.
4. Select a task category from the **Category** menu.
5. Specify a due date.
6. Specify the security settings for the task.
7. Click the **Save** button.

▶ To add Things To Do Items from a template:

To Do Templates are groups of predefined, commonly used Things To Do items

1. From the Things To Do List, click the **Add From Template** link to open the Add To Dos screen in a new browser window.
2. Select a template from the **Template** menu.

3. Complete any required fields on the form.
4. Click **Next**.
5. Verify the To Do items; you can remove or edit the items as you wish.
6. Click the **Finish** button.

Completing To Do Items

▶ To complete a To Do Item:

Click the item's name link and follow the onscreen instructions. Completion screens vary, depending on the task type.

Editing To Do Items

▶ To edit a To Do Item:

1. From the Things To Do List, click an item's **Details** link to open the Edit To Do screen.
2. Make your changes and click the **Save** button.

Deleting To Do Items

▶ To delete a To Do Item:

1. From the Things To Do List, click an item's **Details** link to open its Edit To Do screen.
2. Click the **Delete** button at the bottom of the screen.

⚠ You cannot delete a Things To Do Item if another item is dependent on it.

Participants

About Participants

Many people can be involved in a single real estate transaction: buyers, sellers, brokers, appraisers and inspectors, just to name a few. The Participants feature enables you to manage the contact information of the people working on a transaction. You can also share documents and task lists with other participants, enabling them to view and upload documents, and complete Things To Do items.

The Participants List

The Participants List displays the participants in a transaction.

Print View Add Participant

3 HILLCREST DR		
Role	**Participant**	**Office**
Buyer`s Agent	Smith, John (555) 555-1010	Mundane Properties (555) 555-1001
Listing Agent	Fry, Stephen (555) 555-1100	Quite Interesting Realty (555) 555-1111

▶ To access the Participants List:

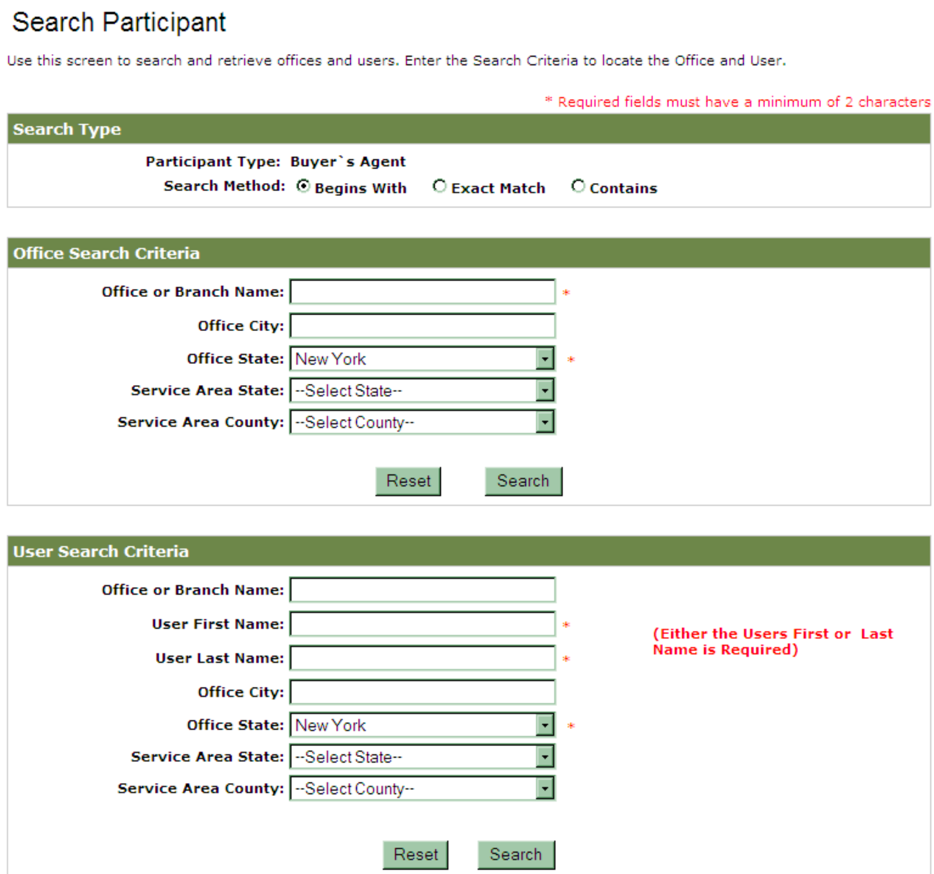
From the Document Manager Folder Summary screen, click the **Participants** link.

Adding Participants

▶ To add a participant:

1. From the Participants List, click the **Add Participant** link. The Select Participant Type screen opens in a new browser window.

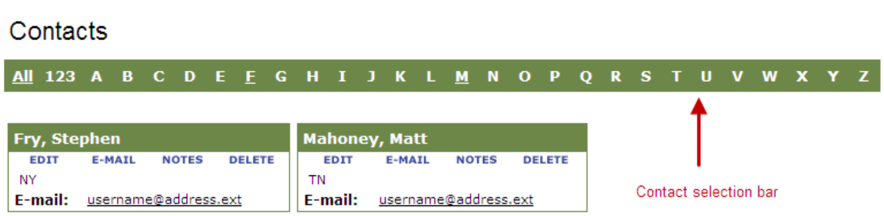
2. Select the type of participant you want to add. The Search Participant screen opens. You can search by office or user.



3. Enter your search criteria and click the **Search** button.
4. From the search results screen, click the **Select** link of the person you want to add.
   - If you searched by office, click the **Show Office Roster** link to view the members of that office.

Contacts

Document Manager enables you to keep a list of contacts. You can import contacts from, and export contacts to, other applications.



▶ To access your contacts list:

Click the Contacts link in the main navigation bar.

Viewing Contact Information

To view contact information, click one of the underlined items in the Contact Selection bar. All contacts whose last name begins with the selected letter will be displayed (if you click All, all of your contacts will be displayed).

Adding Contact Information

▶ To add a new contact:

1. From the Contacts screen, click the Add New Contact to open the Add New Contact screen.
2. Enter the contact information. Fields marked with an asterisk are required.
3. Click the Submit button to save the contact information.

Importing Contacts

Many applications, such as Microsoft Outlook, allow you to save contact information as comma-separated values (.csv) or tab-delimited text files. You can use these files to import a contact list into Document Manager.

▶ Before you begin:

You must have a contact list in .csv or tab-delimited format saved on your computer. This file must contain first and last name information for each contact. Document Manager will ignore any contact without both first and last name data during the import process.

▶ To import contacts into Document Manager:

1. From the Contacts screen, click **Import Contacts**. The Import Contacts page opens in a new browser window.
2. Click the **Browse** button and use the Choose File dialog to locate the contact list you want to import.
3. In the **Select Your Options** panel, indicate how you would like duplicate contacts to be handled.
4. Click **Import**.

Exporting Contacts

Document Manager enables you to export your contact list in comma-separated values (.csv) format.

▶ To export your contact list:

1. From the Contacts screen, click **Export Contacts**.
2. To view the .csv file, click **Open**.
3. To save the file to your computer
   - 3.1. Click **Save**.
   - 3.2. When the Save File dialog opens, select the location on your computer to save the file.
   - 3.3. Click **Save**.

Settings

The Settings page enables you to change your system preferences and run reports. To access the Settings page, click **Settings** in the top navigation bar.

Settings

My Settings

- Personal Information
- Notifications
- Display Settings
- Favorite Providers
- External Systems Accounts
- To Do Templates
- Personal Service Providers
- Share Document Folder Access
- Profile Page Contents

My Reports

- Document Folder Activity

My Settings

Section	Description
Personal Information	Edit personal information such as your phone numbers or e-mail address.
Notifications	Select how you will be notified when you are added to a new Document Folder, when Document Folder changes are made, or when services are ordered.
Display Settings	Select the number of Document Folder-related items to display on your Home and Document Folder Summary pages.
Favorite Providers	Displays a list of your favorite providers, including their contact information.
External Accounts	Specify the External System(s) of which you are a member. Document Folder information can be autopopulated directly from property listings.
To Do Templates	Customize the To Do Lists that you will use to manage your Document Folders.
Personal Service Providers	Manage the list of Service Providers you use who are not formal participants in the DocPro system (Personal Service Providers).
Share Document Folder Access	Allow another person in your office to access and manage your Document Folders.
Profile Page Contents	Supply text, upload your photo, and view your personal DocPro Profile Page.

My Reports

Section	Description
Document Folder Activity	Generate time-frame specific reports of Document Folders in which you have participated.

From the Settings page, you can

- Edit your personal information
- Edit your notification settings

- Change your display settings
- Manage your favorite providers
- Manage your external system accounts
- Manage your To Do Templates
- Manage your personal service providers
- Share your folder access
- Edit your profile page
- Run Folder Activity reports

To change your system settings:

1. From the Settings page, click a link in the **My Settings** panel to open the appropriate settings screen.
2. Make the desired changes and click Save.

For a detailed description of system settings, see the online Document Manager help files (press the F1 key while in Document Manager).