

TEMPO with Document Manager

Training Supplement

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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.


[My Document Folders](#) [Settings](#) [Help](#) [Log Off](#)

[Summary](#) ■ [Things To Do](#) ■ [Participants](#) ■ [Data Forms](#) ■

Summary

[Status Report](#) [Archive Report](#) [Import](#)

276 Lybolt RD



Property Address: Address here

Property Type: Residential
Document Folder Type: Resale/New Construction
Status: Active
Phase: Listing

MLS#: MLS number here
Settlement/Escrow#: unknown
Target Close: unknown
Tracking ID: [Not Assigned](#)

[Create Coversheet\(s\)](#) [Upload Doc\(s\)](#) [Create Doc Package](#) [Add New Doc](#)

Documents Available to View

<input type="checkbox"/> Name (Click to view)	Type	Comment	Upload Date	Rev	MLS	Public	
Estimated Closing Statement	Escrow/Settlement/Title		12/10/2008	2	<input type="checkbox"/>	<input type="checkbox"/>	Details
Lead Paint Disclosure	Disclosure		12/10/2008	2	<input type="checkbox"/>	<input type="checkbox"/>	Details
Agency Disclosure	Disclosure		12/10/2008	5	<input type="checkbox"/>	<input type="checkbox"/>	Details

Documents Pending Upload

<input type="checkbox"/> Name (Click to upload)	Type	Comment	Due Date	Associated To Do	
MLS Input Form	Other		8/7/2008	MLS Input Sheet	Details Remove
Mold Report	Disclosure	Yes			Details Remove
Property Condition Disclosure	Disclosure		8/10/2008	Property Condition Disclosure	Details Remove
Property Tax Bill Printout	Escrow/Settlement/Title		8/12/2008	Property Tax Information	Details Remove
Smoke Detector Affidavit	Disclosure		8/9/2008	Smoke Detector Affidavit	Details Remove

► **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:

Create New Document Folder

* = Required Fields

Optional MLS Data Import

Enter the MLS Number and select a listing source then click **Import** to retrieve data and primary photo.

MLS Number: *

MLS: *

Type: *

User Name: *

Password: * Remember me.

Required Document Folder Information

Enter the following information to create a new Document Folder.

Your Role: *

Document FolderType: *

Property Type: *

Initial Phase: *

Street Address: *

Document FolderName: Use Street Address for Name
 or Enter Name *

Property State: *

Property County: *

Optional Document Folder Information

The following information is optional. You may enter it now, or you can skip this section now and enter the information later. This form can be accessed at any time from the Document Foldersummary page.

City/Area:

Zip:

Parcel or Tax Number:

MLS Number:

Listing Date:

Contract Acceptance Date:

List Price:

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.

Step 1: Select Documents To package

Include File	Name	File Type	File Size	Upload Date
Select All				
DeSelect All				
<input checked="" type="checkbox"/>	Listing Agreement	Adobe Acrobat	63 K	10-22-08
<input type="checkbox"/>	Smoke Detector Affidavit	Adobe Acrobat	92 K	10-22-08
<input checked="" type="checkbox"/>	Lead Paint Disclosure	Adobe Acrobat	168 K	10-22-08

Step 2: Order Documents To package

Listing Agreement
 Lead Paint Disclosure

Step 3: Select Delivery Options

Email Report

My Email
 Other Email

Wait for the PDF package to generate

Step 4: Select Upload Option

Do Not Store this Document Package in the Transaction
 Add this Document Package as a New Document to the Transaction
 Revise an Existing Document in the Transaction with this Document Package

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.

Document Settings

Document Information			
Document ID:	201907819		
Document Name:	Lead Paint Disclosure		
Document Type:	Disclosure		
Description:	<div style="border: 1px solid black; height: 20px;"></div>		
All Comments:	[12/1/2008 12:22:48 PM(CT) -] final version		

Document Security			
Select the appropriate permission level for each role by checking the appropriate box below. To modify a Role to have less permissions, the current permission must be unchecked first. Warning - If a role has Document Owner security, then all participants with that role will be able to change Document Security.			
Role	View	Upload	Document Owner
	Select All	Select All	Select All
	Deselect All	Deselect All	Deselect All
1031 Rep	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appraiser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buyer(s)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buyer`s Agent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Buyer`s Agent Assistant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buyer`s Broker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Buyer`s Transaction Coordinator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Closing Coordinator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Document Options	
<input checked="" type="checkbox"/>	Check to make the document available to any member of your MLS.
<input type="checkbox"/>	Check to make the document available via the Public Document Site.
<input checked="" type="checkbox"/>	Check to notify participant(s) with "View" permission when the document has been uploaded.

► **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
✓	Listing Agreement	Listing Date	Required Documents		7/3/2008	10/22/2008
●	MLS Input Sheet	Listing Date	Required Documents		7/3/2008	
●	Agency Disclosure	Listing Date	Required Documents		7/3/2008	
✓	Get Key	Listing Date	Listing Activities		7/3/2008	7/3/2008
✓	Put sign on property	Listing Date	Listing Activities		7/4/2008	7/5/2008
✓	Smoke Detector Affidavit	Listing Date	Required Documents		7/5/2008	10/22/2008
✓	Take/Schedule Photos	Listing Date	Listing Activities		7/5/2008	7/5/2008
✓	Lead Paint Disclosure	Listing Date	Required Documents		7/5/2008	10/22/2008
✓	Upload Pictures	Listing Date	Listing Activities		7/6/2008	7/5/2008
✓	Schedule Office Caravan	Listing Date	Marketing		7/6/2008	7/8/2008
●	Property Condition Disclosure	Listing Date	Required Documents		7/6/2008	
✓	Just Listed! card to neighborhood	Listing Date	Marketing		7/8/2008	7/8/2008
✓	Schedule Open House	Listing Date	Marketing		7/8/2008	7/8/2008
●	Property Tax Information	Listing Date	Required Documents		7/8/2008	
●	Estimated Seller's Closing Statement	Listing Date	Required Documents		7/13/2008	

► **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.

Add New To Do

Complete the information below to create your new To Do Item. When you have completed the information click **Save**. To exit this screen without saving changes click **Cancel**.

* Required fields

To Do Information

Description: *

Type: Checklist Item *

Category: <Create New Category> *

When adding a new category you must click the **Add** button for the category to save.

Due Date:

Dependent upon Transaction Date

#Days Before

Dependent upon To Do

#Days Before

Dependent upon Calendar Date

Security

Add Roles to the Permissions List to allow participants to view and complete this To Do Item.

Available Roles		Permissions List
<div style="font-size: small;"> <ul style="list-style-type: none"> 1031 Rep Appraiser Buyer(s) Buyer's Agent Buyer's Agent Assistant Buyer's Broker Buyer's Transaction Coordinator Closing Coordinator Hazard Insurance Heating & Air Conditioning Rep </div>	<input type="button" value="Add"/> <input type="button" value="Remove"/> <input type="button" value="Add All"/> <input type="button" value="Remove All"/>	
<input type="checkbox"/> Check here to allow all Participants to view this To Do Item		

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.

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

Search Participant

Use this screen to search and retrieve offices and users. Enter the Search Criteria to locate the Office and User.

* Required fields must have a minimum of 2 characters

Search Type

Participant Type: **Buyer`s Agent**
 Search Method: Begins With Exact Match Contains

Office Search Criteria

Office or Branch Name: *

Office City:

Office State: *

Service Area State:

Service Area County:

User Search Criteria

Office or Branch Name:

User First Name: *

User Last Name: *

Office City:

Office State: *

Service Area State:

Service Area County:

(Either the Users First or Last Name is Required)

- Enter your search criteria and click the **Search** button.
- 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.

Contacts

All 123 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Fry, Stephen	Mahoney, Matt
EDIT E-MAIL NOTES DELETE NY E-mail: username@address.ext	EDIT E-MAIL NOTES DELETE TN E-mail: username@address.ext

↑
Contact selection bar

▶ **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).
