STEPS FOR SUCCESS IN APPFILES - SELLER

When you have a listing, here are the steps to follow

1. Click on Create new Appfile from your home screen

2. File Name: Name the file with the property address
   (not the client's name, ex.123 Main Street N., St Petersburg, FL 33701)

3. FIle type: Sellers or if this transaction has a referral then select Sellers w/Referral (If you selected Sellers w/Referral then the following fields are required to be filled in as follows

   a. Referral Agent Brokerage Mailing Address: (ex. 123 Main Street N. Suite 101, St Petersburg, FL 33701)

   b. Referral Agent Brokerage Name: (ex. ABC Realty, Inc)

   c. Referral Agent Name: (Name of the agent who gave referral)

   d. Referral Type: Select from drop down menu (Inbound or Outbound)

4. Listing Paperwork Type: Choose what applies to the listing (this action is very important as it will launch the proper checklist into your appfile)

   a. Single Family Home

   b. Single Family Home w/HOA

   c. Single Family Home FHA/VA

   d. Single Family Home Pre-1978

   e. Single Family Home Pre-1978 w/HOA

   f. Condo

   g. Condo Pre-1978

   h. Condo VA/FHA Pre-1978

   i. Vacant Land

   j. Commercial

5. Enter the following information

   a. Additional Fees Collected from Client: (number only)

   b. Agent Name (YOUR NAME): (required)

   c. Buyer(s) Name: (not applicable at this stage of the transaction)

   d. Closing Date: (not applicable at this stage of the transaction)

   e. Commission %: (number only, ex. 2.5) (this % of commission being paid to you at closing)

   f. Commission Amount +/- MLS fee: (number only ex. 2,500.00 + 300 = 2,800.00) (this is the commission amount being paid to you at closing)

   g. MLS Number: (not applicable at this stage of the transaction)

   h. Property Address: (ex. 123 Main Street N., St Petersburg, FL 33701)

   i. Seller(s) Name: (ex. John Smith & Jane Smith)

   j. Title Company Address: (ex. 1122 Main Street Suite 101., St Petersburg, FL 33701)

   k. Title Company Name: (ex. Baxter Title)

   l. Transaction Type: Select from the drop down menu (Residential, Rental, Commercial)

   m. Who is paying the $95 LBR Fee?: Select from the dropdown menu (Me or My Client)

   n. Other Notes: (You can enter notes to share with Compliance Department here or any notes pertaining to the transaction)

6. Click the "Next" button

7. Select Users (this typically doesn't apply to you unless you are working with another agent in our office and need to give access to that person to access to your file)

8. Now click on the Create Appfile button - Now you have successfully created your appfile

HOW TO ADD PAPERWORK TO YOUR APPFILE

1. Click on add forms (on the left hand side and a new window pops up)

2. Use the "Select Form Package:" option to see a pre-selected list of recommended forms: (Please use this option)

   a. Condo Listing Package (This package contains a pre-selected list of ALL forms you could possibly need for this type of transaction) to add to your file, you will need to click on the green plus ⊕ button next to each form you will need.
      - (1) Exclusive Right of Sale Listing Agreement - Transaction Broker [REQUIRED]
      - (2) MFR Residential Data Entry (QTR 4 2018)
      - (3) Sellers_Brokerage_Disclosure [REQUIRED]
      - (4) Seller Property Disclosure - Condominium (FILLABLE) [REQUIRED]
      - (5) Affiliated Business Disclosure [REQUIRED]
      - (6) Addendum B. Homeowners' Assn. [REQUIRED]
      - (7) Addendum P. Lead Based Paint Disclosure [REQUIRED if property built on or before 1978]
      - (8) Addendum A. Condominium Rider [REQUIRED]
      - Addendum AA. Licensee Disclosure of Personal Interest
      - Addendum N. Coastal Construction Control Line
      - Addendum Q. Housing for Older Persons
      - Blank Addendum to Listing Agreement
      - Frequently Asked Questions and Answers Sheet
      - MFR - Status Change (QTR 4 2018)
      - Modification To Listing Agreement

   b. Listing Package For Single Family (This package contains a pre-selected list of ALL forms you could possibly need for this type of transaction) to add to your file, you will need to click on the green plus ⊕ button next to each form you will need.
      - (1) Exclusive Right of Sale Listing Agreement - Transaction Broker [REQUIRED]
      - (2) MFR Residential Data Entry (QTR 4 2018)
      - (3) Sellers_Brokerage_Disclosure [REQUIRED]
      - (4) Seller Property Disclosure - Condominium (FILLABLE) [REQUIRED]
      - (5) Affiliated Business Disclosure [REQUIRED]
      - (6) Addendum P. Lead Based Paint Disclosure [REQUIRED if property built on or before 1978]
      - Addendum AA. Licensee Disclosure of Personal Interest
      - MFR - Status Change (QTR 4 2018)
      - Modification To Listing Agreement
      - Short Sale Addendum to Listing Agreement

3. Once you add the documents will appear on the right hand box of your screen, you have the option to Add as a Single Merged Form. This is the Preferred Option to request digital signatures OR you can Add as Separate Individual Forms. Then click on add selected forms.

4. Now, click on the close button on the top right hand side of the window with the forms.

5. Look to the right part of your file, you will see different sections click on Listing & Contract Information and Dates and fill in the information, then click on Listing Broker and Agent Info and Seller Information (fill

in the information) and close the window.

6. Now look towards the bottom left of your screen, you will see the General Paperwork section (this is where your paperwork will be) click on the link below it to open your forms.

7. A new window will pop up with your forms, click on the Import values button to import all of the information you entered in step #4. You want to import from Info Fields and follow the prompts.

8. Once you have completed the import, please review your forms, fill in the rest of the forms as required.

9. You can now send your documents for electronic signature or print your documents.

10. Once you have the documents fully executed, you need to Upload to the Checklist for compliance.

UPLOADING FULLY EXECUTED DOCUMENTS TO THE CHECKLIST
3 EASY WAYS TO DO THIS

Option #1

1. Click on the package, this is the link under General Paperwork

2. A new window will pop up with all of the documents

3. Now select the edit pages tab (next to edit fields) and now click on the Split Forms button (next to change form order button)

4. Select One or Multiple forms to Split by clicking on the checkbox next to each title. Use the Move To / Submit dropdown to the right of each form to match that form on the checklist. (ex. Exclusive Right of Sale Listing Agreement - Transaction Broker | Move To / Submit dropdown | Executed Listing Agreement)

5. You will continue to match the forms you have fully executed on the left hand side of the screen to the drop down menu on the right until you have matched all. If you have a form that is not available from the drop down, simply select Submit to Checklist.

Option #2

1. Click on the package, this is the link under General Paperwork

2. A new window will pop up with all of the documents

3. Now select the edit pages tab (next to edit fields) and now click on the Split Forms button (next to change form order button)

4. Select all forms and click on the split selected forms button. (this action will split the forms) click ok when prompted

5. Now the manage paperwork section will appear (the paperwork will appear at the bottom of your window under general paperwork)

6. Click on the form you need to add to your checklist and a new window will appear with your form. Look towards the top middle part of the window, you will see the word Section: (select from the dropdown menu next to it) match that form on the checklist. (ex. Exclusive Right of Sale Listing Agreement - Transaction Broker | Executed Listing Agreement) your window will turn blue around the border, this action will let you know you have successfully added that form to the checklist.

7. You will now close the window, click on the manage paperwork button and follow steps 1 thru 6 for the rest of the forms. If you have a form that is not available from the drop down, simply select Submit to Checklist.

Option #3

1. Use this option If you have uploaded paperwork, emailed paperwork or you have scanned in paperwork. Always click on the manage paperwork button of your appfile on the left hand side of your screen.

2. Your paperwork will always appear at the bottom of the window. Now you can simply drag from the bottom (by selecting the small green lines to the left of the form) and drop in its proper place on the checklist at the top.

3. You will continue to do this until you have submitted your documents to the checklist and the checklist is completed. After you have completed the checklist, change the file status to active listing.