



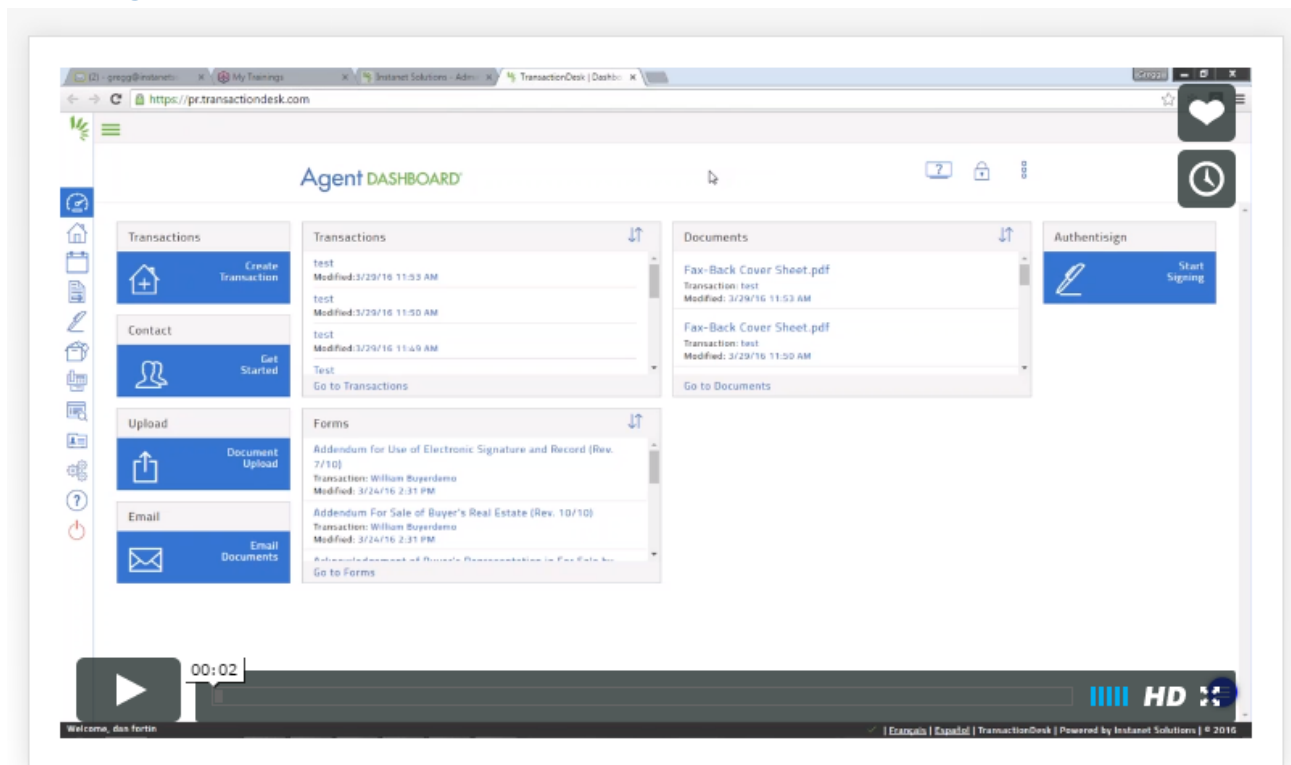
instanet Quick Start Guide

The full suite of Instanet Solutions products is being licensed for all NTREIS Participants and is included in your MLS fees.

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Training Videos



Documents


All of your documents and transaction files from the NTREIS Transaction/Doc Manager program have been imported into your Transaction Desk. Matrix supplements will also now be stored in Transaction Desk. This provides a single repository for all of your important documents.

Uploading a Document to my Matrix Listing

From the Modify Listing page, Listing Agents can click on the “Manage Documents via Transaction Desk” link. This opens the ‘Upload Documents’ screen in Transaction Desk.

Modify Listing

Old Brdg (150) **\$569,000**

 ML#: [REDACTED] Rms: 8 Dine: Y Stat: A/RES
SE: [REDACTED] Beds: 4 Bsmnt: Y / FULL Taxes: \$10,032/2015
OC: [REDACTED] FBath: 2 Garg: 2 / ATTACH Assoc: [REDACTED]
Type: 2STORY HBath: 1 Pool: [REDACTED] Heat: FORCAIR
LotSz: 70 x 216 YrBlt: 1999 Firepl: 0 Fuel: GAS
Cool: ACCENT

LO: [REDACTED] LA: [REDACTED] OP: [REDACTED] O/Fax: [REDACTED]
CD: [REDACTED] CL: [REDACTED] DOM: 0 SO: [REDACTED] SP: [REDACTED]
OLP: \$569,000

LOCATION! LOCATION! LOCATION! One of a kind at Oxford Estates. Spectacular, unobstructed backyard view make it worth! This colonial features 4 bedrooms, 2.5 bathrooms with 2 storey foyer & living room. Spacious full basement & 6 cars driveway. Most convenient to NYC transportation. Make it your own! Don't miss out!

Select Form

- [Residential Listing Input](#)
- [Change to Active - Atty Revu](#)
- [Change to Under Contract](#)
- [Change to Under Contract Cont to Show](#)
- [Change to Temporarily Off Market](#)
- [Change to Withdrawn](#)
- [Change to Closed](#)
- [Extend Listing](#)
- [Open Houses](#)

Other Options

- [Manage Photos](#)
- [Manage Documents via Transaction Desk](#) ←
- [Property Panorama](#)

The ‘Upload Documents’ screen in Transaction Desk will open, allowing the Listing Agent to upload documents to the listing, as well as the corresponding transaction file in Transaction Desk:

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Address: [REDACTED]
MLS Number: [REDACTED]

Upload Documents [Close]

This dialog is used to upload document(s) to your listing. Listing documents can be viewed by other agents from your listing.

Once uploaded, the documents will be attached to the listing, allowing them to be visible via the Full Display when clicking on the “Documents” icon:

The screenshot shows the Matrix MLS interface. At the top, there is a navigation bar with links like Home, Search, Stats, My Matrix, Tax, Links, Finance, Market Reports, Help, and Mobile. Below this is a search bar and a 'Recent Search' button. The main content area is titled 'Market Watch: New Listing'. A toolbar below the title contains various icons, including a 'Documents' icon (represented by a document with a magnifying glass) which is highlighted by a green arrow. Below the toolbar, there is a 'Recent' section showing a listing from 05/24/2016. The listing details include:

- GLVAR: Residential Rental
- ML#: [Redacted]
- PubID: 0
- Status: A-ER
- Area: 504
- Rent/Mo: \$1,495
- Address: [Redacted]
- Unit: 0
- StatusUpdate: [Redacted]
- Zoning: SINGLE
- County: [Redacted]
- Building #: 0
- Parcel #: [Redacted]
- Zip: 89148
- Community: [Redacted]
- City/Town: [Redacted]
- Twnshp: 22
- Range: 60
- Sect: 8
- YrBuilt: 2004
- Tower Name: [Redacted]
- Subdiv: RHODES RANCH-PARCEL 11-PHASE 1
- Res MLS #: [Redacted]
- State: NV
- Asso/Comm Feat Desc: COMGOLF, COMPOOL, EXERCRM, GRDGATD, JOGGIPets Y
- Add Pet Rent: N
- Gated: Y
- Elem K-2: [Redacted]
- Elem 3-5: FORB
- YrRound: N
- Junior: FAIS
- Highsch: SIER
- MetroMap: 72-C4
- Age Restr: Comm N

 A 'GENERAL INFORMATION' table follows, listing details like Style (SINGLE), Roof (TILE), Type (DETACHED), Garage (2), AppxLivArea (1,829), AppxTotLivArea (1,829), Bldg Desc (2STORY), Unit Desc (2LEVEL), #Beds (3), #Baths (2), #Den/Oth (0), #Loft (1), #Acres (0.07), and more. Public Remarks describe the property as a 'Beautiful, well kept, Rhodes Ranch Golf Community home'. Ag/Ag Remarks mention an application fee of \$50 per adult and a requirement for tenant due diligence.

Viewing Documents in Matrix

A click on the “Documents” icon on the Full Display in Matrix will open the “Listing Documents” screen in Transaction Desk and list all the documents that are available for MLS view for that listing.

Users can view and download the document from this screen. Just click the setting menu on the far right hand side of the document name and select download or view:

The screenshot shows the 'Listing Documents' screen in Matrix. At the top left is the 'instanet SOLUTIONS' logo. Below it, there are fields for 'Address:' and 'MLS Number:', both of which are redacted. The main area contains a list of documents:

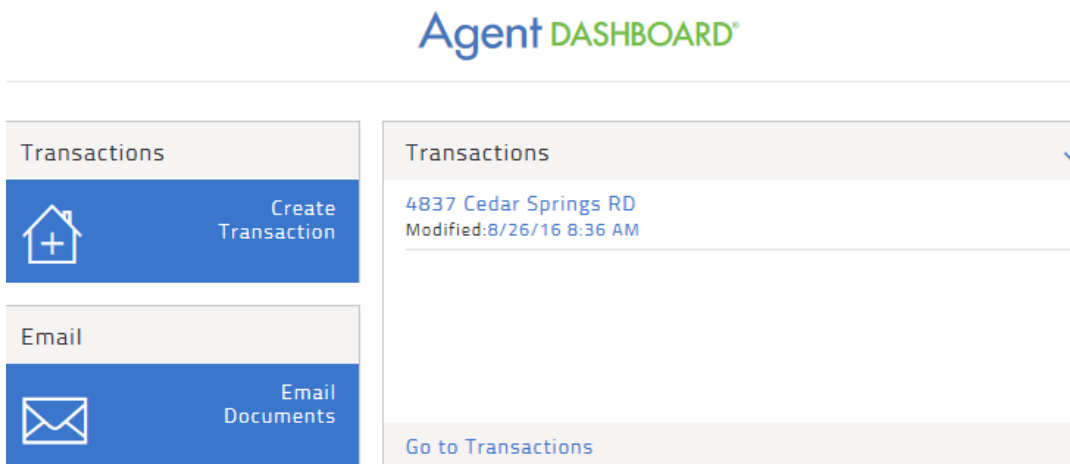
- Approvals.pdf
- blank.pdf
- Blueprint.pdf
- Nameless Document.pdf

 Each document name is followed by a small menu icon (three dots) on the right side, indicating that users can interact with these documents.

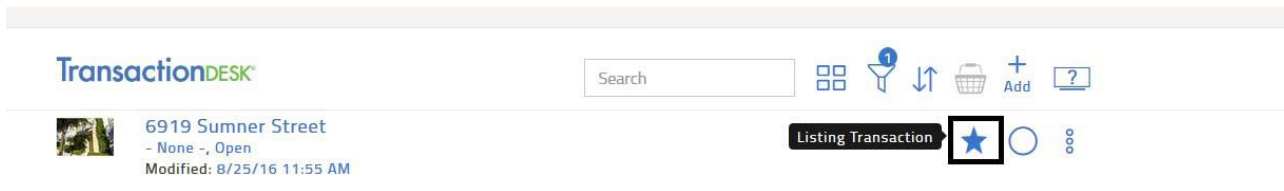
Note: Only documents marked for “MLS view” can be viewed by other agents from the documents link.

Viewing and Managing Documents in Transaction Desk and Matrix:

From Transaction Desk, look for the transaction file on your Dashboard:



To be able to mark a document available on the MLS, we first need to make sure the MLS listing is linked into Transaction Desk. When you select the Transaction, you should see a “Star” next to the transaction name indicated that it is linked to the MLS:



--When you see a solid blue star next to your transaction it means it is actively linked to a listing in Matrix.
 --If you click this, it will break that link.
 --To re-link you need to import that MLS number into a transaction again.

NOTE: you can only link a listing you own to one transaction file at a time. If you import your MLS number and you do not get a star, it means you have a duplicate file in Transaction Desk that is already linked.

To unlink a file from the MLS, just click the star. To re-link a transaction you will have to import the MLS number back into a transaction. While you can upload documents to an “unlinked” transaction file, only “linked” files will allow you to link documents for display on the MLS displays.

Adding Documents

To add a document, simply open the transaction and go to the documents section and add your document(s). You can upload from a file on your computer or a file from Dropbox, Google Drive,, or One Drive. You can also submit files via

email. To mark a document active for the MLS Listing, just click the star and mark it private, MLS, or public:

6919 Sumner Street

Listing # [REDACTED]
6919 Sumner Street, [REDACTED]

Documents

Search []

Creating Tasks As An Agent..pdf

Fax-Back Cover Sheet.pdf

Docs will always default to Private first. Click the blue star to make it MLS or Public.

Close

MLS Access

Update

Select the appropriate MLS access option below for this document

- Private Document
- MLS Only
- Public Document

When the "MLS" is marked, the document icon appears on the MLS Full display. Any MLS participant can select the Transaction Desk document icon to view any documents marked for MLS display for that listing:

#	ML #	Ar	St	Address	Unit #	Price	BSq	Des	Sub	Sq Ft	Total	Bd	Bth	Gr	R	Spa	Yrs	Act	Close	DOM
1	[REDACTED]	103	H	[REDACTED]		\$127,000	1	STORY	SFR	1,311	2	2	2	N	N		1994	06/11/2013	7	

Actions: Refine Save Carts

MLS Number is [REDACTED]
Property Type is Residential
Found 1 result in 0.02 seconds.

I can now hit the TD icon and see any documents attached to the listing.

Then use the action menu in Transaction Desk to view or download the document:

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Listing Documents

Address: 37 [REDACTED]
No [REDACTED]
MLS Number: 13 [REDACTED]

SRPD.pdf

View Download

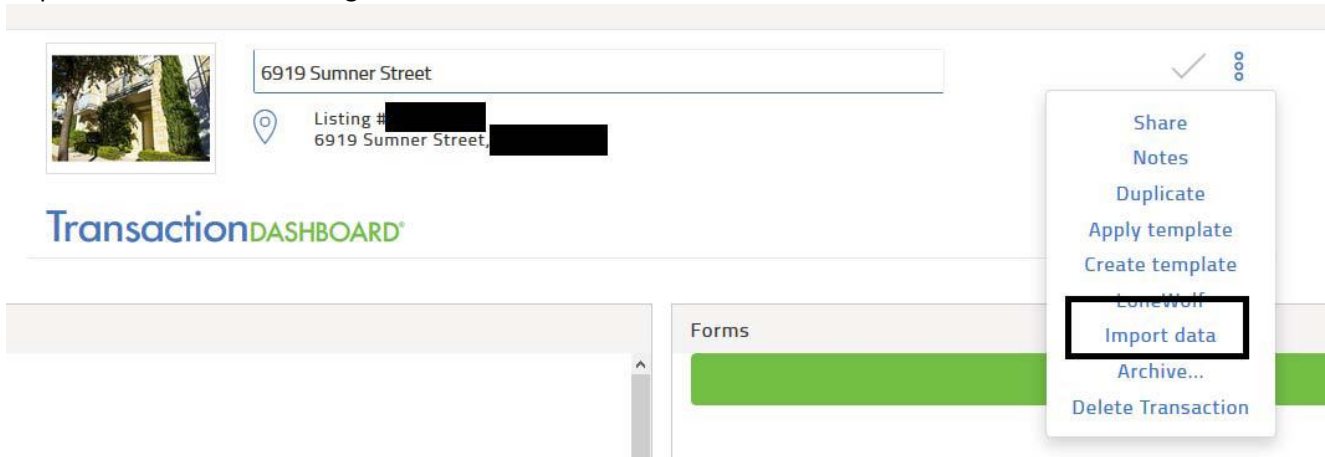
****Important Tips**

--Remember you can only link one MLS number to one transaction file at a time. If your transaction is not linked it could be because of three things

- 1) First make sure you do not have a duplicate. Go to your main transaction page and do a search by the address. If you see one that comes up with a start next to it use that file.
- 2) If you do not have a duplicate it most likely means the original transaction doesn't have a MLS number on it and therefore not linked to the listing.
- 3) You do not own the transaction file. You can only link your transaction to listings on the MLS that you own. You cannot link other people's listings to your transaction and make your docs available publicly on that listing. (You can create a transaction file on a listing as the selling agent and load private documents).

If you need to import an MLS number back to a transaction file:

Open the transaction and hit the ellipses menu next to the transaction name and select import data. Now import the MLS number in again. Your transaction should be linked now.



Close Import Import

?

NTREIS

MLS Number

Automatically populate forms?

InstanetForms

InstanetForms® makes your documents accessible wherever you are. The software integrates with AuthentiSign®, DocBox® and the rest of the Instanet suite of applications to provide a truly seamless experience.

Forms libraries include all promulgated TREC forms, TAR licensed forms (for REALTOR members) and NTRIS input forms and available local Association property related forms. Broker specific forms can also be made available.

Instanet is a web-based application available from your PC, Mac, tablet and Smartphone.

MLS and Tax Integration

Easily start a listing agreement or a sales contract by importing property information from Realist Tax or from the MLS.

Create a transaction file from the MLS or from Transaction Desk. If creating from Transaction Desk, you can choose to import information with an MLS # or from Realist parcel number or address to autofill property information into your forms:

Create Transaction

Close Create

Name * Sample Transaction

Type Residential Listing

Import Data (optional) - Select Source -

Add me as the * Listing Agent

Use Wizard

Tax Search

Close Select

To continue, you must enter part of either: the Tax Number, or the Street Address.

County Dallas

Street Number Street

Street Name Street

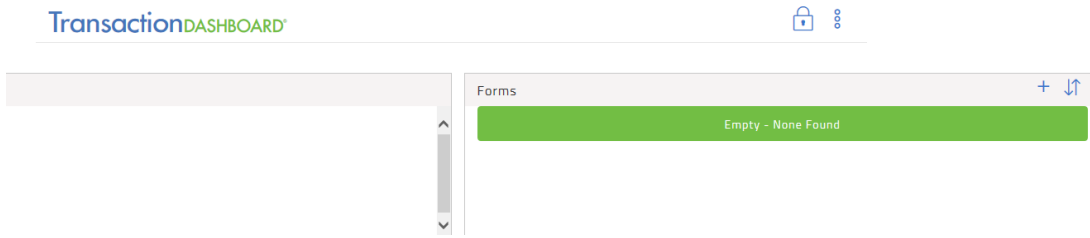
City/Township City

Zip Code Zip

Tax Number Tax

Search Tax Data

Use the “Forms” widget on your Dashboard to Add forms to your file:



Forms can be added individually, or you can create Transaction Templates from “Settings” in the left hand navigation bar so each time you do a Residential Listing, all appropriate forms are added:



Forms are auto-filled with information imported from MLS or Realist and any information you added to the Property Detail page when creating your transaction.

AuthentiSIGN

Complete with tamper proof security technology to prevent document modification, Authentisign® is 100% E-SIGN compliant and FHA and Fannie Mae approved. And, to make things even easier, the software integrates seamlessly with the popular cloud services Dropbox®, Google drive and OneDrive.

- Editable design templates make signature and initial placement quick and easy.
- No app installation required – 100% browser based.
- Simple signature wizard used for a streamlined signing process.

No additional fees! AuthentiSign is fully integrated with InstaNet forms and is included in as part of your MLS fees.

Easily add contacts to sign the transaction from your Instanet contacts or from your Google contacts.

