

NVAR & PWAR

Intro to Docs+



Meet the Team

FROM REMINE DOCS+



Aamir

VP, Docs+ Operations



Chris

Customer Success and Support
Manager



Nicole

Training Manager

What You'll Learn

FROM THIS GUIDE

Getting Started with Docs+
Transactions
Packages
Clauses
Checklist, Form Library and Submissions
Roles and Contacts

Getting Started

WHAT TRANSACTION MANAGEMENT MEANS IN THE MODERN AGE

Most platforms don't offer significant improvements over the traditional document management and signing process; PDF is simply the new paper, e-signature is the new pen and email is the new fax machine.

Docs+, however, is a true shift forward. It integrates the entire transaction process - from document creation to back office submission and review - into one intuitive, cloud-based collaborative tool.

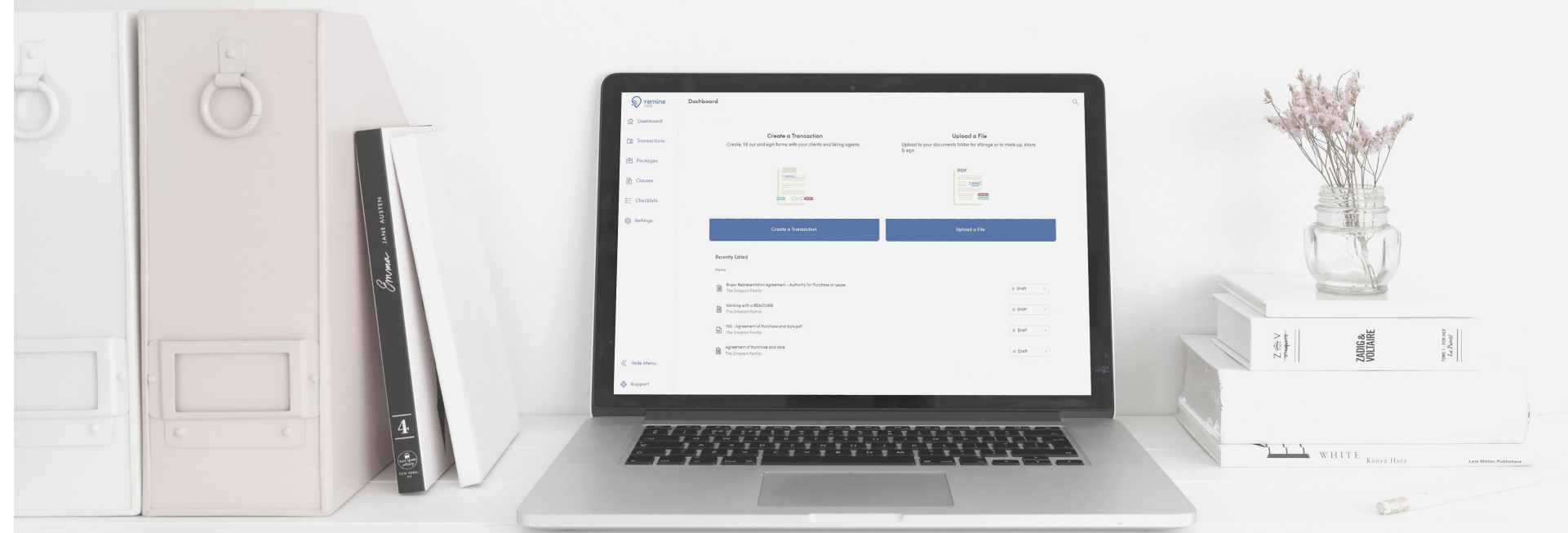
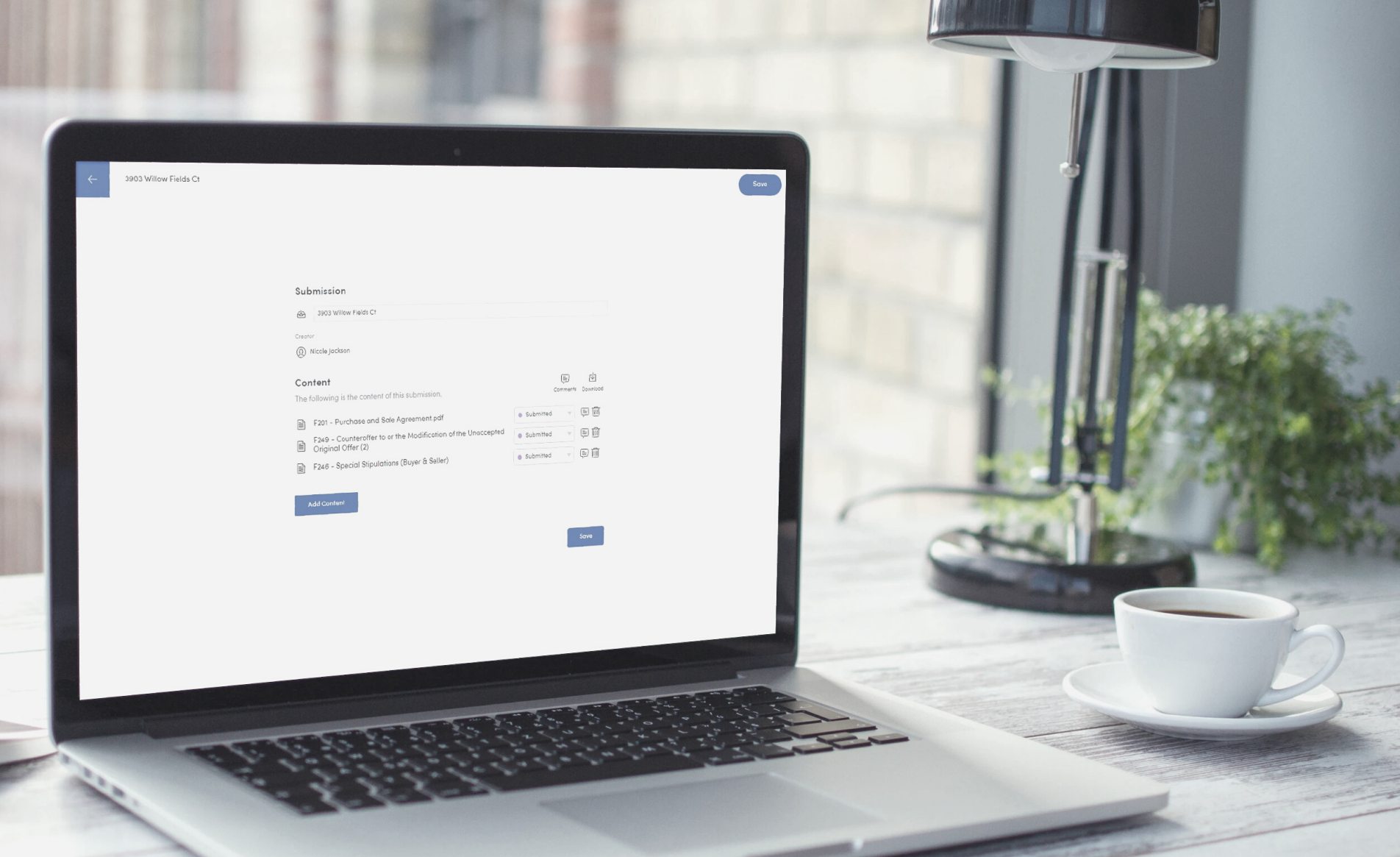
Contracts are the cornerstone of any real estate transaction. With the sophisticated smart form technology of Docs+, creating, signing, collaborating and distributing documents is a breeze.

Smart Forms

Transaction documents are "linked" to save time on repetitive field entries. Save additional time with automatically integrated signature and initial fields for all parties. Warnings and alerts highlight potential errors prior to sending and signing, preventing needless mistakes and potential amendments.

Accessing Docs+

Docs+ is easily accessed from the NVAR Dashboard, using your single sign on information. There are no additional passwords to memorize.



Docs+ Dashboard



Purpose

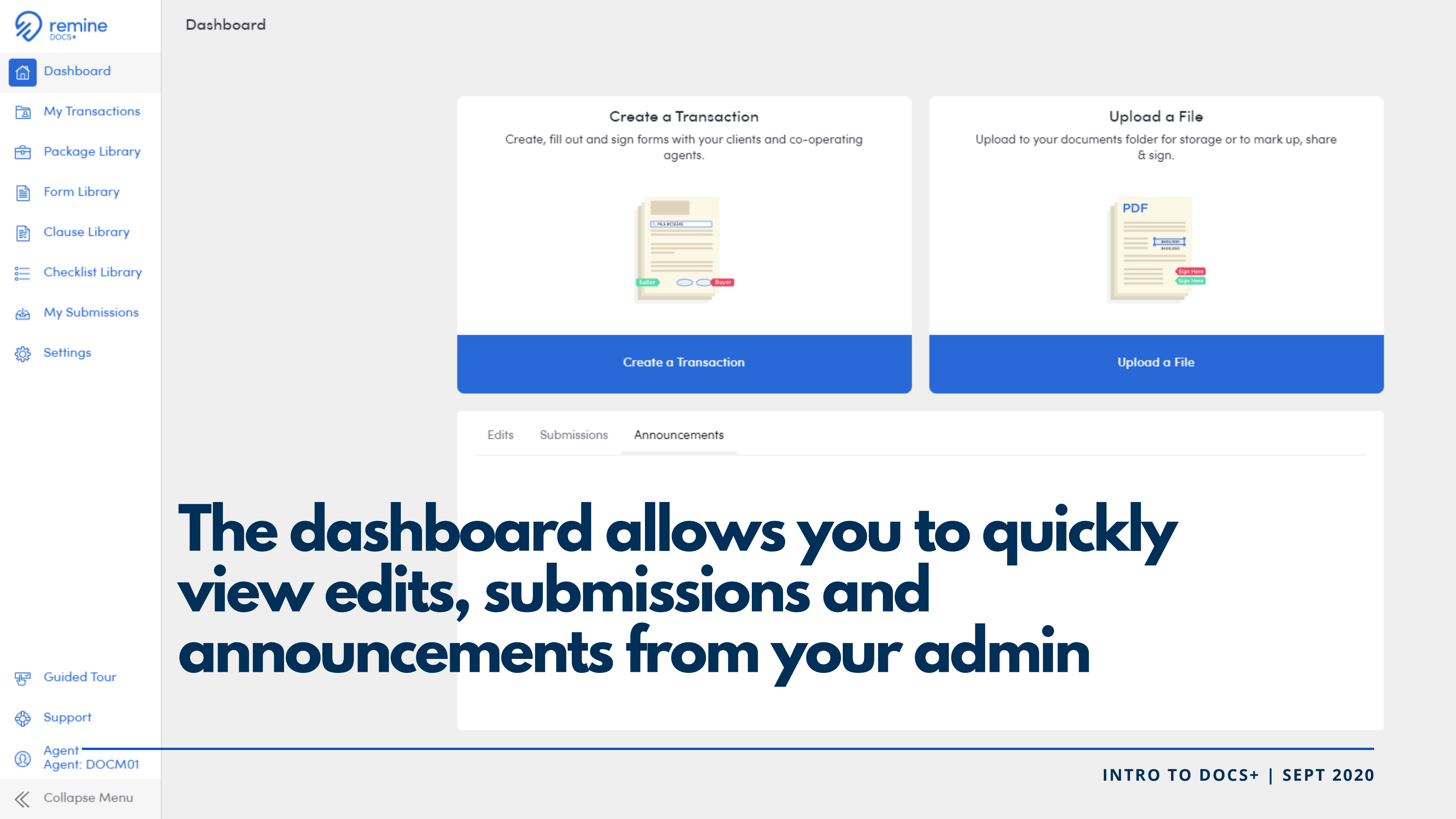
The Docs+ dashboard is your central hub for transaction management - from creating to submission to back office for review.

Settings

The Settings menu allows you to create your signature stamp, set your time zone and update account information.

Help Center


The Docs+ Help Center is your resource for articles, videos and to get live help from our support team.



- Dashboard
- My Transactions
- Package Library
- Form Library
- Clause Library
- Checklist Library
- My Submissions
- Settings
- Guided Tour
- Support
- Agent
Agent: DOCM01
- Collapse Menu

Create a Transaction


Create, fill out and sign forms with your clients and co-operating agents.



Create a Transaction

Upload a File

Upload to your documents folder for storage or to mark up, share & sign.



Upload a File

Edits Submissions Announcements

The dashboard allows you to quickly view edits, submissions and announcements from your admin

Introduction to Transactions

○ Your Transactions

The transactions in your Docs+ account are yours alone, they are not those of your team.

○ Best Practices

It is a best practice to limit one folder per transaction. You can create sub-folders within a Transaction folder by clicking the '+Folder' button,

○ How They Work

Your Transactions can be accessed by clicking the 'Transactions' button on the left navigation menu. To access any client's documents, just click on that client's file folder from this page.

○ New Transaction?


Creating a new transaction is simple. Simply click the 'New Transaction' button. More forms can be added to the folder by clicking the '+Form' or 'Upload' buttons inside any transaction file.


Packages


OFFERS MADE SIMPLE


Document packages are fully customizable template collections of pre-filled forms that make offer generation quick and easy. New Packages can be created from the Packages page on the left navigation bar. To create a new package from scratch by clicking the '+Package' button at the top of the page.

Packages can be organized into folders by clicking '+Folder'.


remine
DOCS+


Dashboard


Transactions

Packages



Packages

Folder

Package

Sort 

☐ Select All

Name	Date Modified	Permissions
<input type="checkbox"/>  Sample Document Package	12-20-2019 10:42 a.m.	 Editable

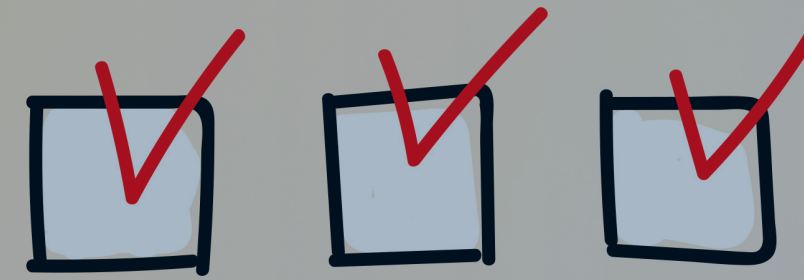
Clauses

		Folder		Clause	Sort		Select All	
				Name			Date Modified	

ALWAYS KNOW WHAT'S NEXT

The checklist builder helps you to always know what is next in the transaction and ensures that no important steps or items are missed in the transaction process.

From the 'Checklist' page on the left navigation bar, click 'Checklist' from the top of the page and add tasks by selecting 'Add Tasks'.



CHECKLIST



Roles and Contacts

LET'S START A TRANSACTION



Roles

THE BEST WAY TO LEARN IS TO TRY IT YOURSELF



TestListing Agent

The agent representing the seller.



TestBuyer's Agent

The agent representing the buyer.



TestBuyer

The party purchasing the property.



TestSeller

The party selling the property.

Using Test Contacts



Create a Transaction

Click 'Create a Transaction' from the Dashboard and choose which side of the deal you are representing.



Use Test Contacts for Roles

Add your testbuyer(s), testseller(s) and test cooperating agent to practice.



Send

After filling your form out as desired, select 'Send' from the upper right hand corner. When using test contacts, you will receive an email seeing the view of each role in the transaction.

What should you always do before sending a transaction?

CHECK THE PEOPLE BANNER FOR THE ROLES!

Upload to Docs+

Received an offer as PDF? Need to Upload an Image? **We got you covered!**

PDF

To upload a document into Docs+, click 'Upload' on the Dashboard or within any Transaction folder.

Image

Any non-PDF will need to be converted into a PDF in order to be opened and edited in-app. From within the Transaction folder, click on the file to open it and select 'Clone & Convert' to make a PDF copy that can be viewed, edited and signed.

Mark-Up Tools

An assortment of 'Mark Up' tools are available while viewing a PDF. These tools allow you to draw, add text, add signature/initial tags, rotate pages (handy for upside-down faxes) & split multi-page files into separate documents.



Guided Tour

The guided tour can always be accessed in-app. You have two options, to use the click-through tour or read the articles.

Golden Rules of Docs+

Linking

Each Smart Form will pull information from other associated documents in the folder when it's first opened - so start with "field heavy" forms like purchase and sale agreements before opening other forms.

Unique Emails

Docs+ identifies each individual party member by their unique email address, so everyone participating in a transaction must have their own email address.

Check the People

Always review the 'People' banner to ensure that each party member will be able to view, interact and sign each document as expected.

More Tips

- Chrome is our preferred browser
- You can always convert a Smart Form to a PDF, if needed.
- Pay attention to the icon types (Smart Form, PDF or blank).



Questions?

We are always here to help! Think of questions after the session, reach out to training@remine.com.