

Using Forms: Creation to Connection

1



FORMS

CREATE FILE IN FORMS

- From main screen choose the Forms app
- Select "+ Create New File"
- Choose representation type
- Fill in property information
- Choose a template
- Select "Create"

2



DIGISIGN

PREPARE FILES FOR SIGNATURES

- Choose forms to prepare for signatures
- Select "Fill and Send"
- Make last edits before sending
- Select "Prepare Signature"
- Select "Needs to sign" for both seller and agent
- Select "Next"
- Select "Send"
- Write message to client and select "Send for signatures"
- Choose "Sign now" to complete agent signatures
- Agree to e-signature terms
- Select "Start" and follow on-screen prompts until all required fields are completed.
- Select "Finish Signing"
- Select "I'm done"
- Wait for status of envelope to be complete

3



SKYSLOPE

CREATE YOUR LISTING

- Select "SkySlope" from apps
- Select "Manage Listings"
- Select "Create Listing"
- Select "Enter the Listing"
- Be sure slider selection is on "Forms"
- Select the Forms file you created and then select "Next Question"
- Enter answers to on-screen prompts selecting "Next Question" after each answer.
- Look over information then select "Create my listing"

4



SKYSLOPE

CONNECT FORMS TO LISTING

- Select "Documents" from the top menu bar
- Click the checkbox next to a signed document
- Select "Assign"
- Choose appropriate label from dropdown
- Select "Assign"
- Repeat the assigning process for all signed documents
- Select "Checklist" from top menu bar
- Confirm that your documents are pending listing coordinator review