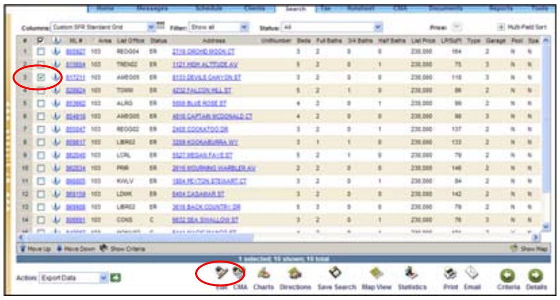
Doc Manager

Quick Reference Guides: Getting Started

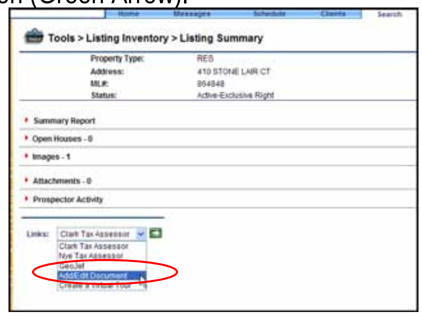
Creating a Doc Folder and Uploading MLS View Docs

Learn how to create a document folder and upload documents that are viewable by all members of your MLS

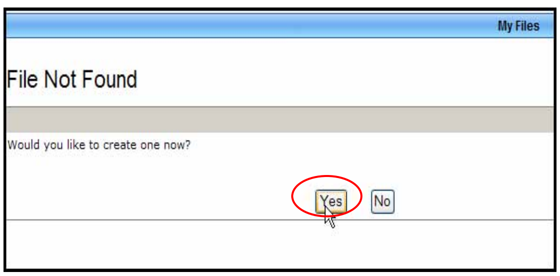
1. On your *Active Listings* screen in MLXchange, find the listing you want to create a document folder for and click *Edit*
.



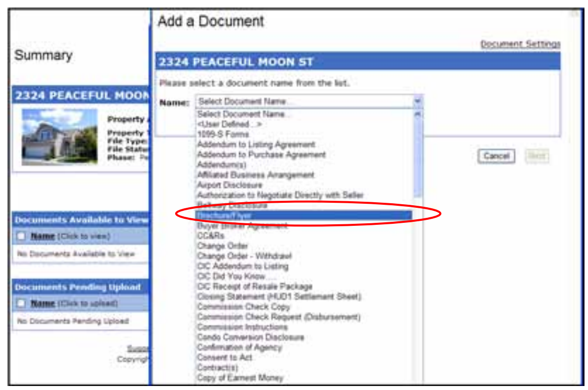
2. On the *Listing Summary* page, click on the *Links* drop down and select *Add/Edit Document* and click the *Enter* button (Green Arrow).



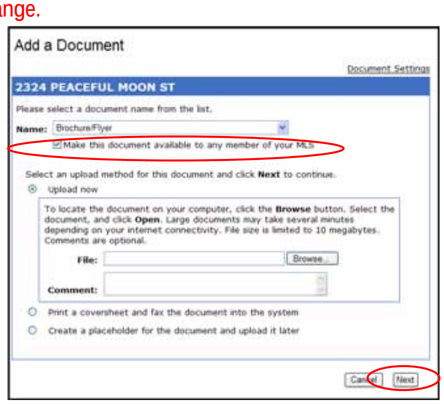
3. A new window will open indicating that a File Folder does not currently exist. To create a Folder, click on the *Yes* button.



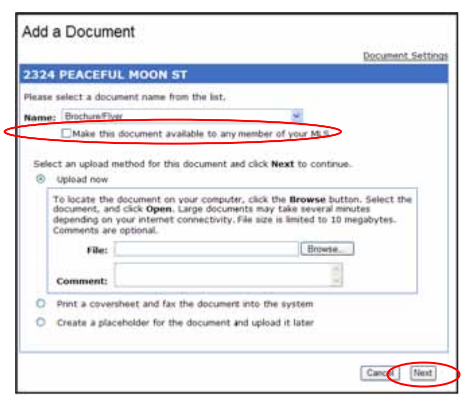
4. The Doc Folder will be created using information from the listing. Another window will display, prompting you to upload your document. Select the document you want to upload from the list. If the document is not listed, select User Defined.



5. To allow members of your MLS to view the document, check the box that states "Make this document available to any member of your MLS" and upload. When you are done, you can close the Doc Manager window to get back into MLXchange. Note: Other Members of the MLS will view your documents marked as MLS view by clicking on the *Documents* link in MLXchange.



6. To keep the document private, do no select the "Make this document available to any member of your MLS" button and upload your document.



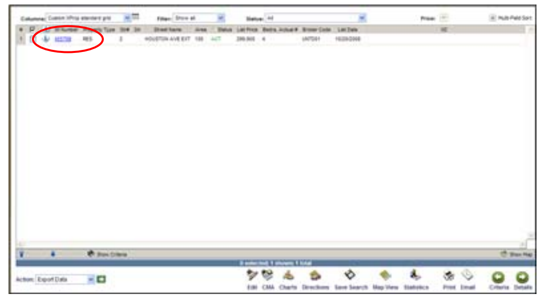
Note: The automated Doc Folder creation will only work if you are on the Listing side of the transaction. If you are on the Buyer's side, please refer to "Creating a New Doc Folder Manually"

Viewing MLS Documents (Previously Attachments)

Learn the most common way to view MLS documents in someone else's listing. This feature is replacing the Attachments link in MLxchange

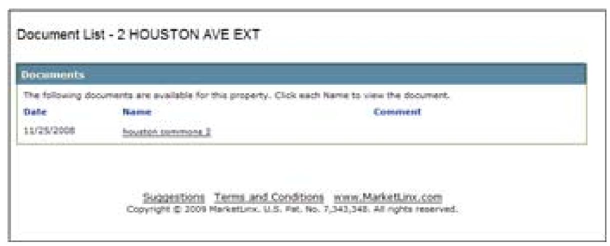
1. From your MLXchange Home Page, search for a listing by address or ML#.

2. On the search results page click the ML# to view the listing detail.



3. On the Listing Detail page click on the *Documents* link in the left hand navigation to view any MLS documents. If no documents are available, a pop up window will display indicating there are no documents for this listing.

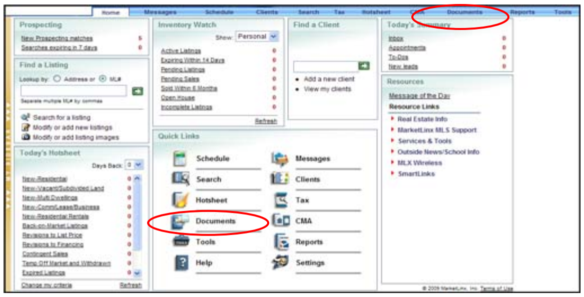
4. Click on the document you want to view.



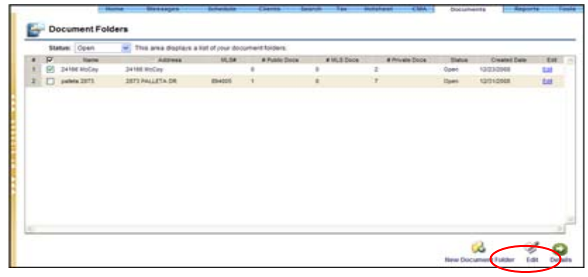
Viewing Your Documents

Learn the most common ways to view all documents in your listings or sale files

1. From your MLXchange Home Page, click on either the *Documents* icon in the Quick Links, or the *Documents* link within the menu bar.

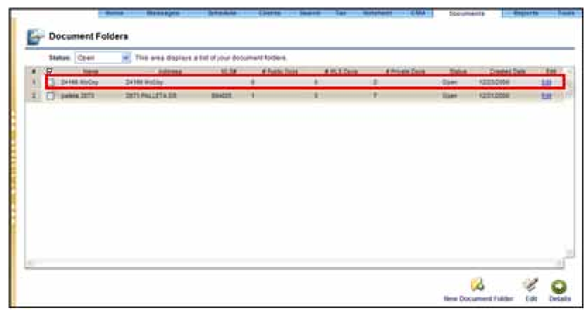


2. From the Documents page you have two options. In the first option, choose the document folder where you wish to view your documents and check the box next to it; then click *Edit* at the bottom of the screen



3. You will be taken to the *Summary* page in Doc Manager where you will see a list of all uploaded documents. Click on the one you wish to view.

4. In the second option, from the Documents screen click on the file to view the *Document Details* page.

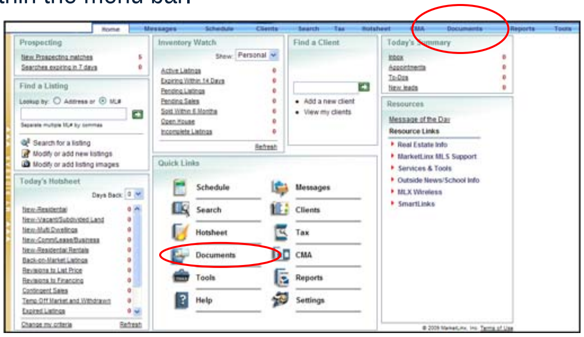


5. In the *Document Details* page click on the document you want to view. Your document will open.

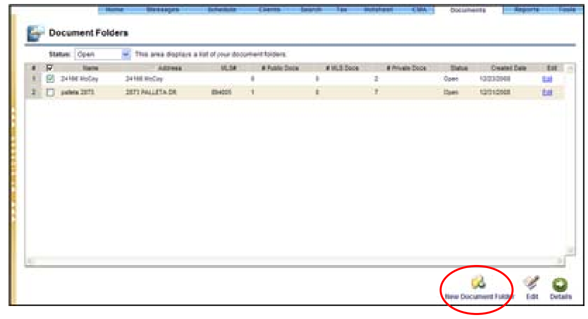
Manually Creating a Doc Folder

Learn how to create a separate doc folder to be used for a sale or other purpose

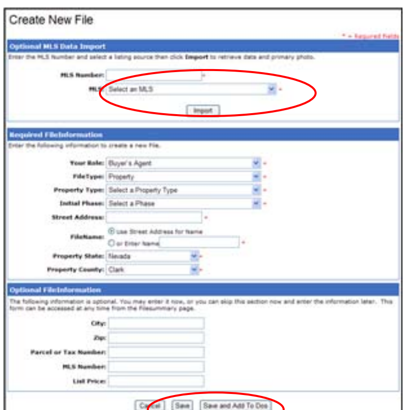
1. From your MLXchange Home Page, click on either the *Documents* icon in the Quick Links, or the *Documents* link within the menu bar.



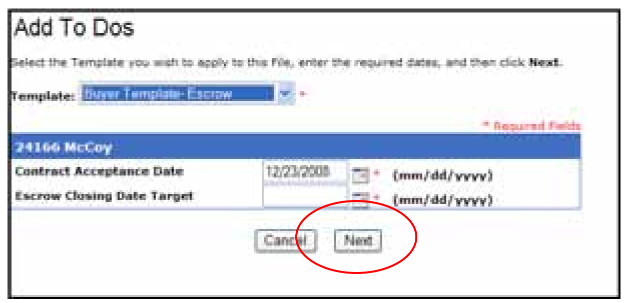
2. From the Documents screen, click the *New Document Folder* icon at the bottom of the page.



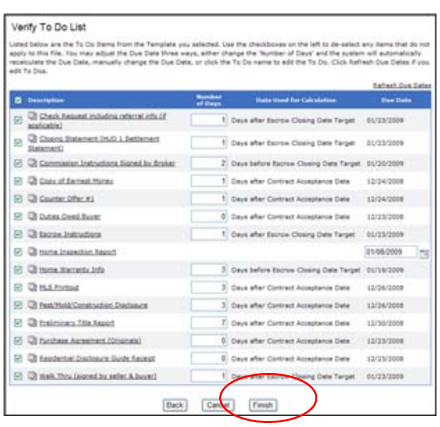
3. If you have the MLS #, enter it and click *Import*. This will add MLS information to your file. If not, you can manually type the information in the 2nd section. Once you have entered the information click *Save*, or if you want to add a To Do list, click on *Save and Add To Do's*.



4. If you clicked *Save*, skip to step 6. If you *clicked Save and Add To Do's* you will be prompted to choose your To Do list. Enter any required dates and click *Next.*



5. Modify your To Do list by removing any unwanted items, changing due dates, etc. Once your changes are done, click *Finish.*



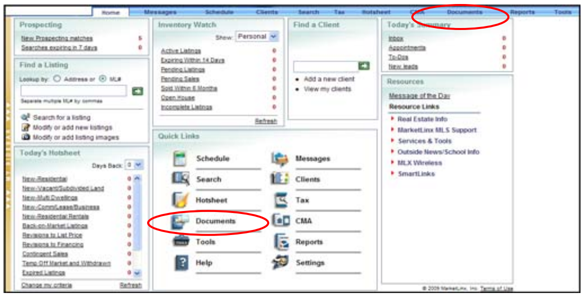
6. Congratulations! Your file has been created. If you added a To Do list, you will see *Documents Pending Upload* on your *Summary* Screen. Otherwise this area will be empty.

Note: Manually importing MLS data is only necessary when creating a doc folder for a sale.

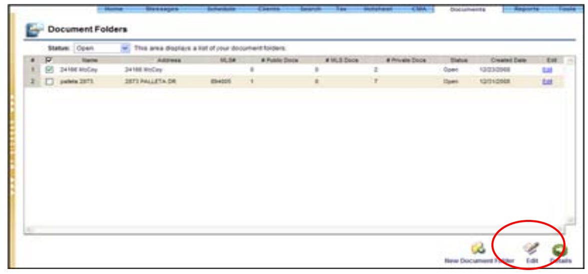
Uploading a Single Document

Learn how to upload a document via fax or electronic upload

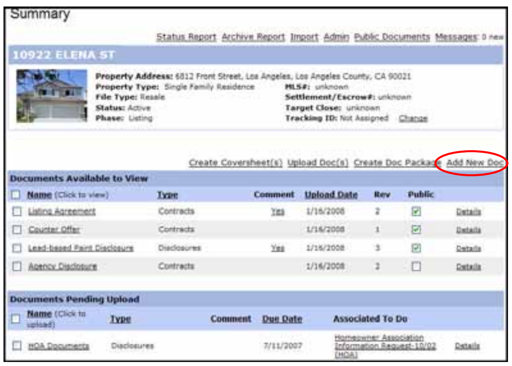
1. From your MLXchange Home Page, click on either the *Documents* icon in the Quick Links, or the *Documents* link within the menu bar.



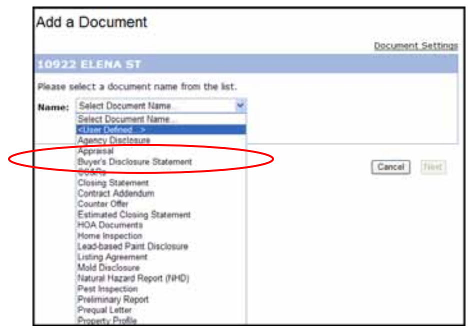
2. From the *Documents* page, choose which document folder you want to add documents into, and then click *Edit* at the bottom of the screen.



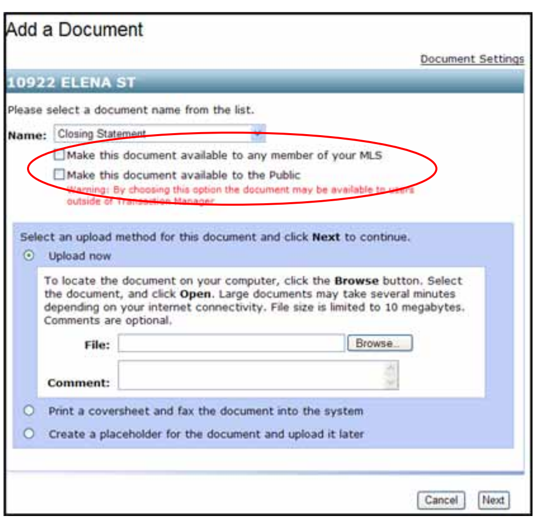
3. From the Summary page in Doc Manager click on the *Add New Doc* link.



4. In the *Add Document* screen select the document you want to upload from the drop down list.



5. Select your options- the first checkbox below the document name allows you to make the document available to members of your MLS. The second checkbox allows you to make the document available via a link to people outside of your MLS.



6. Now, choose your upload method:
A) Select *Upload Now* if you have an electronic copy of your document. Click the *Browse* button and attach your document. Click *Next*.
B) Select *Print a coversheet and fax document into the system*, if you have a hard copy of your document and want to fax it in. Enter your comments. Click *Next*.
C) Select *Create a placeholder for the document and upload it later*, if you want it to appear in your *Documents Pending Upload* section as a reminder to upload it later. Enter your comments. Click *Next.*

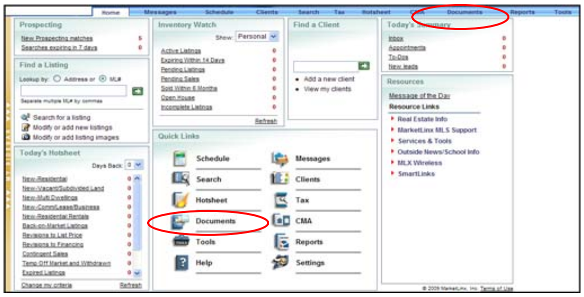
Results:
If you chose Option A, your document will be uploaded and available for review immediately.
If you chose Option B, a fax coversheet will display on your screen for you to print.
If you chose Option C, a placeholder for that document will be created for you to upload the document at a later time.

Note: If your scanner has email capability, you may also email a single TIFF file consisting of multiple documents preceded by their fax cover sheets. The system will upload each of the documents into the file specified by its cover sheet.

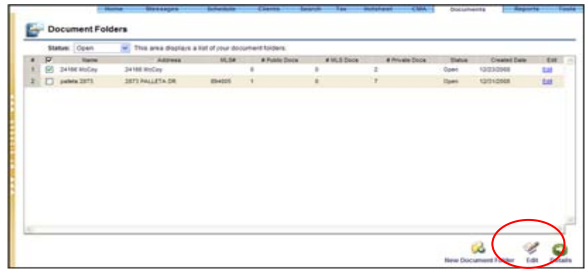
Uploading/Faxing Multiple Documents

Learn how to add multiple documents into your document folder via fax or electronic upload

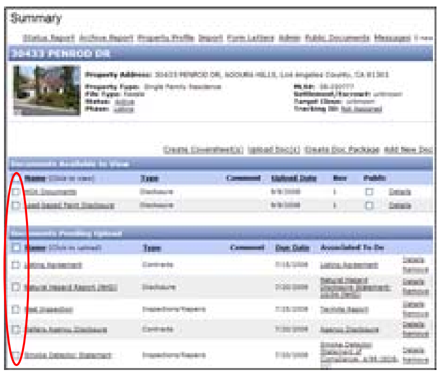
1. From your MLXchange Home Page, click on either the *Documents* icon in the Quick Links, or the *Documents* link within the menu bar.



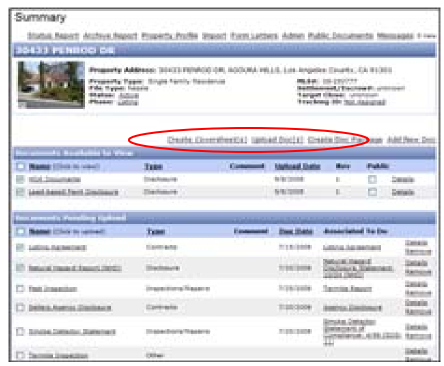
2. From the *Documents* page, choose the document folder you want to add documents into, then click *Edit* at the bottom of the screen.



3. From the **Summary** page in Doc Manager select the documents you want to upload or fax in. You can submit revisions by selecting documents that have been previously uploaded.

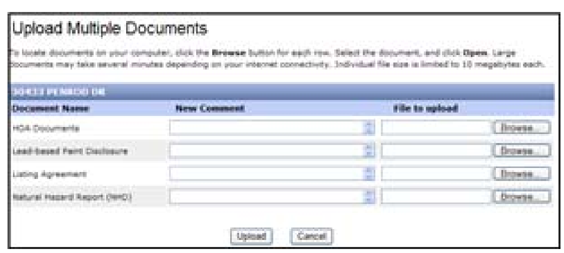


4. Click the *Create Coversheet(s)* or *Upload Doc(s)* link.



5. If you are creating coversheets, they will display on your screen. Review them for accuracy, and then click the *Print* button.

6. If you are uploading electronic documents, you may enter a comment, then click on the *Browse* button and select the first document. Repeat this step until all documents have been attached. Then click the *Upload* button.

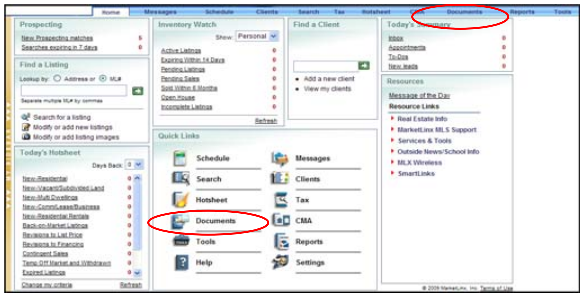


Note: If your scanner has email capability, you may also email a single TIFF file consisting of multiple documents preceded by their fax cover sheets. The system will then upload each of the documents into the transaction specified by its fax cover sheet.

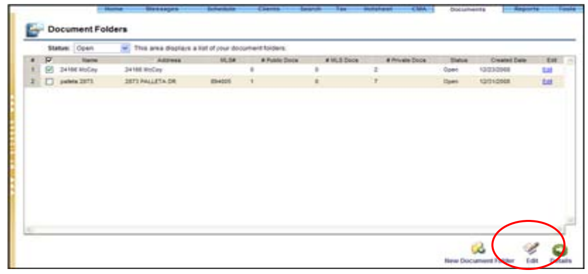
Creating a Document Package

Learn how to compile all your documents into one complete report. These reports may be given to your client or kept as a complete record of the file for your own use.

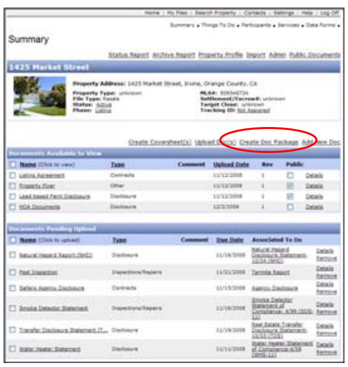
1. From your MLXchange Home Page, click on either the *Documents* icon in the Quick Links, or the *Documents* link within the menu bar.



2. From the *Documents* page, choose which document folder you want to create the Document Package in and check the box next to it; then click *Edit* at the bottom of the screen.

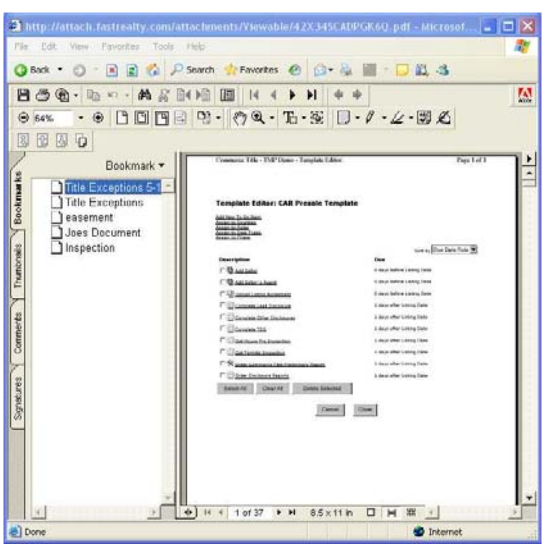


3. From the Summary page, click on the *Create Doc Package* link.



4. On the Document Package page, deselect any documents you do not want to include in the package. Next, arrange the order of the documents, then select the delivery method and choose the upload method. Click *Generate Report.*

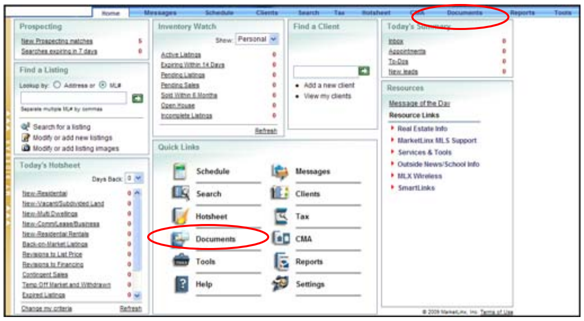
5. The Document Packager will take all the selected documents, convert them to PDF (if they are not already) and index them into one document. You may now save or print your document package.



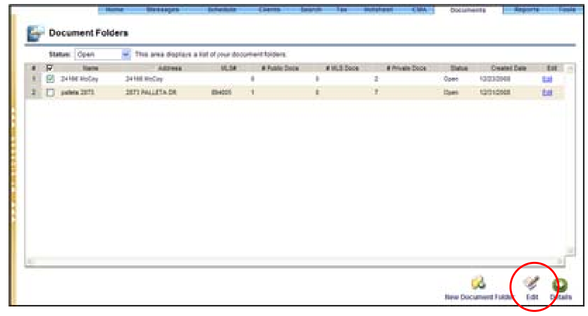
Creating an Archive Report

Learn how to compile a report that includes all your documents and folder information. This report may be given to your client or kept as a complete record of the file for your own use.

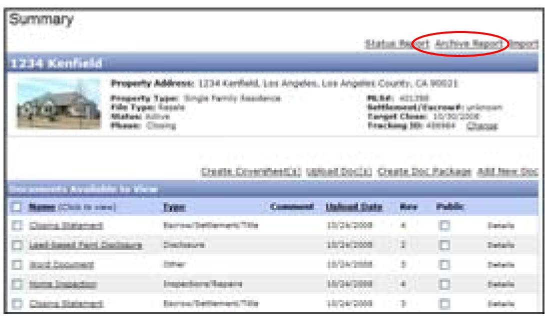
1. From your MLXchange Home Page, click on either the *Documents* icon in the Quick Links, or the *Documents* link within the menu bar.



2. From the *Documents* page, choose the document folder you wish to create an Archive Report for by clicking the check box next to the name, then click on *Edit* at the bottom of the page.



3. From the Doc Manager *Summary* screen, click on the *Archive Report* link.



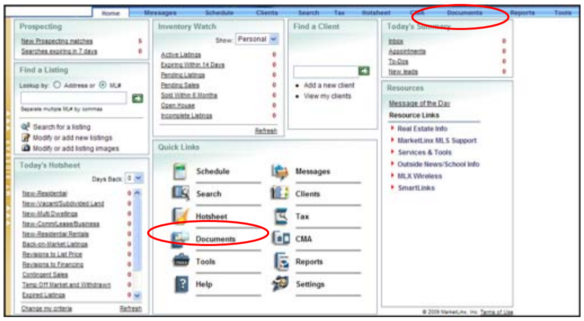
4. On the *Archive Report* screen, follow the steps to determine which information to include, choose the branding and your delivery method. Then click the *Generate Report* button.

5. If you chose to wait for your report, do not close the window until the report has been generated.

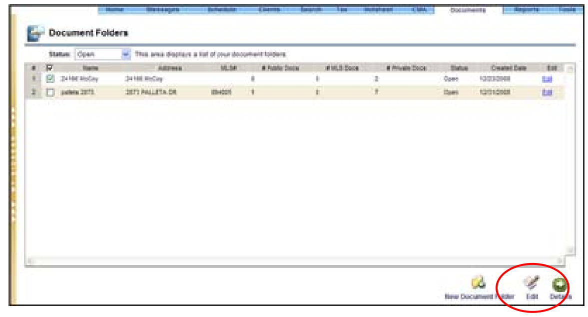
Adding a Buyer/Seller

Learn how to create access for a buyer or seller to view any documents you choose to share with them

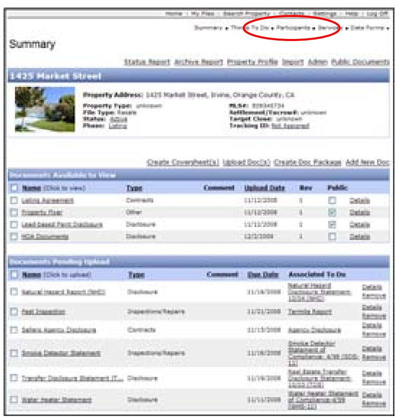
1. From your MLXchange Home Page, click on either the *Documents* icon in the Quick Links, or the *Documents* link within the menu bar.



2. From the *Documents* page, check the box next to the document folder you wish to add a participant to and click *Edit* at the bottom of the screen.



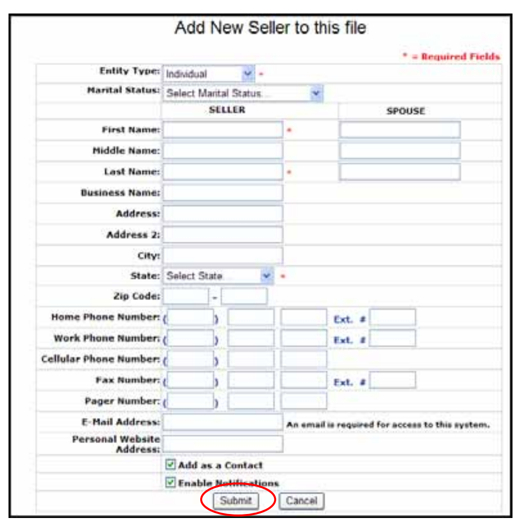
3. From the Doc Manager *Summary* screen, click the *Participants* link.



4. In the Participants page, click *Add Participant* and select either *Buyer* or *Seller* from the *list.*

5. If the user is already in your *Contact Manager*, you can search and add them from your contacts. Otherwise, click the *Enter New User Information* radio button and click *Next*.

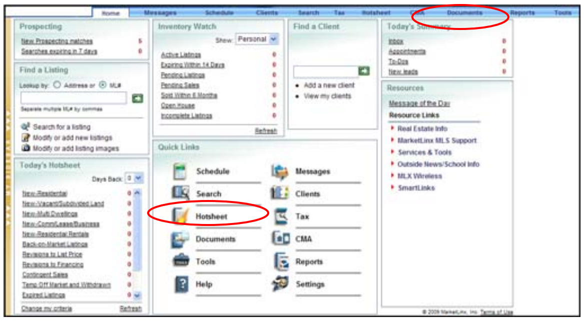
6. Complete the Buyer/Seller information. Enter the email address to send an electronic notification to the newly added participant. Click *Submit.*



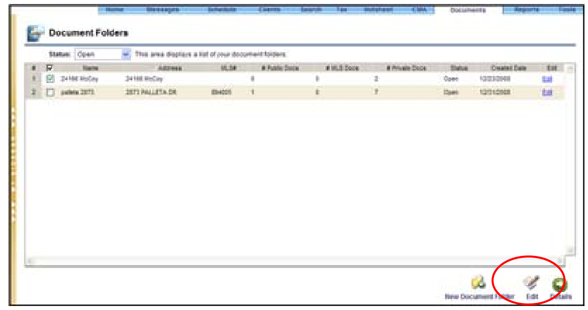
How to Add a Participant

Learn how to give access to others so they can view your document folders

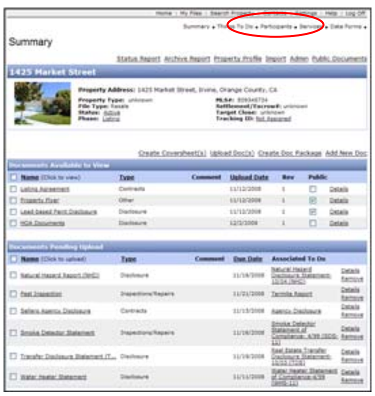
1. From your MLXchange Home Page, click on either the *Documents* icon in the Quick Links, or the *Documents* link within the menu bar.



2. From the *Documents* page check the box next to the document folder you wish to add a participant to and click *Edit* at the bottom of the screen.

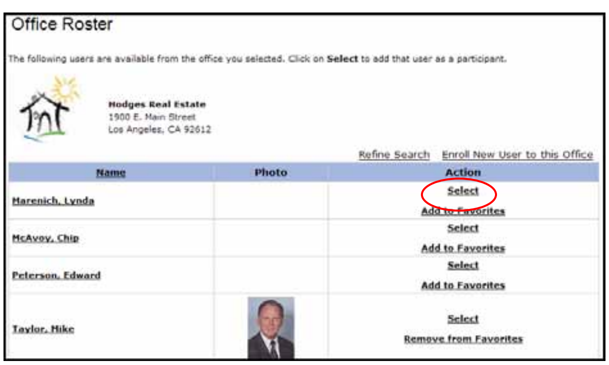


3. From the Doc Manager *Summary* screen, click the *Participants* link.

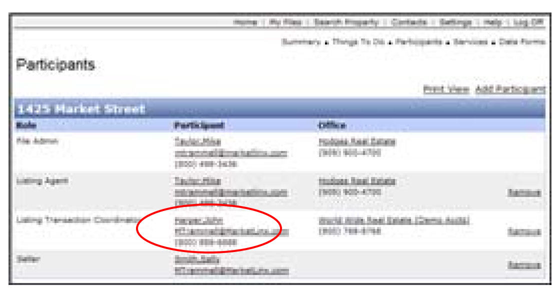


4. Click the *Add Participant* link and select the participant type from the drop down list.

5. On the search screen, enter your search criteria. You can search by office name or user name. Once you find the user, click on the *Select* link to add them to your file.



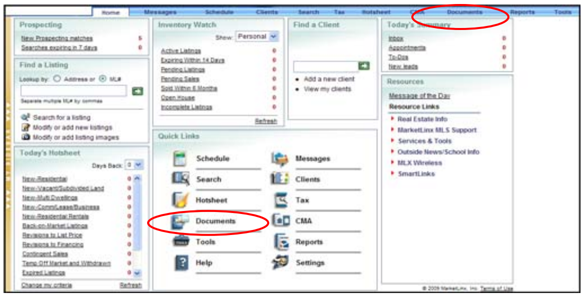
6. Congratulations! Your participant has been added.



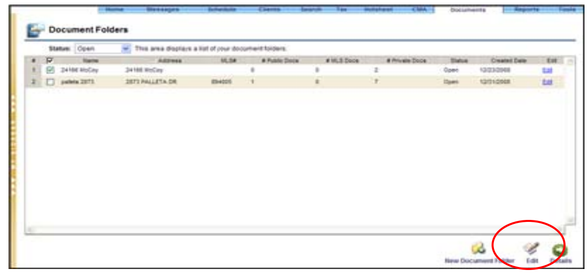
Adding To Do's From a Template

Learn how to add tasks (To Do items) to your doc folder to help you work more efficiently

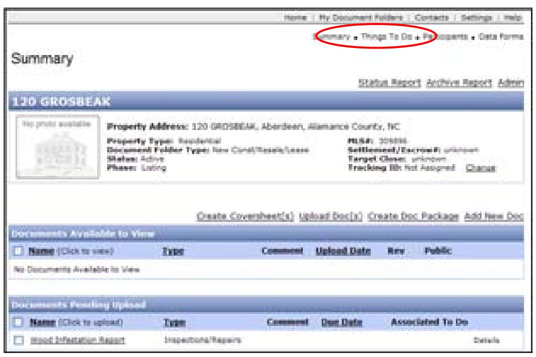
1. From your MLXchange Home Page, click on either the *Documents* icon in the Quick Links, or the *Documents* link within the menu bar.



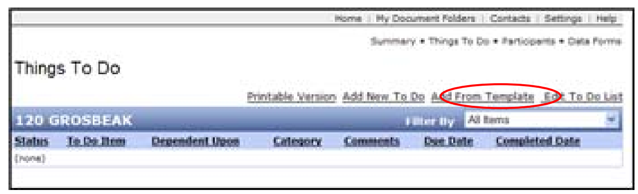
2. From the *Documents* page, choose which listing you want the To Do list to be associated with and check the box next to it; then click *Edit* at the bottom of the screen.



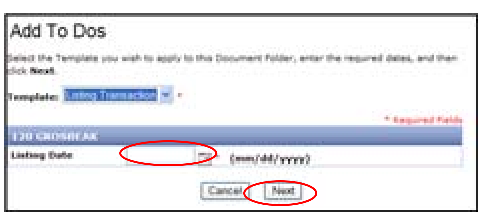
3. From the Doc *Summary* screen, click on the *Things To Do* link.



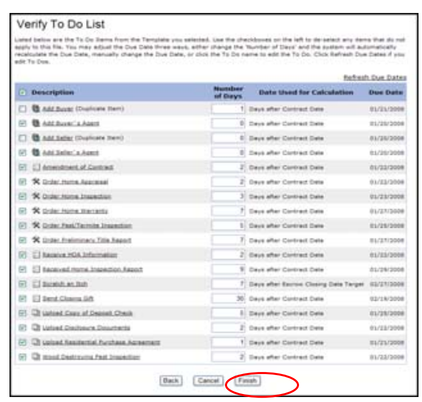
4. Click on the *Add From Template* link.



5. Select the Template you wish to use from the pull-down list and enter the required date(s), then click *Next.*



6. Review the list of To Do items. Check the pre-assigned due dates and modify if necessary. Click *Finish*. Your To Do list has been added!



Disabling Pop-Up Blockers

How to Disable Common Pop-Up Blockers

Listed below are some of the most popular pop-up blocking software packages, and instructions to enable pop-up windows with them. Pop-up windows must be enabled to use our system. There are dozens of pop-up blocking software packages and we are unable to list each here, but we have chosen the most popular. Generally, most pop-up blockers will install themselves either within the browser toolbar, or within the Windows Taskbar along the bottom right corner of your screen.

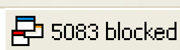
AOL Toolbar- The AOL Toolbar is available from America On-Line as part of their service's offerings. It appears in the browser as follows:

The following icon is the pop-up blocker: 

To allow pop-ups to appear, merely click on the icon. You should now see the following: 

Once this is done, then you should be able to use the online system properly. Once you are finished using the online system, you can click the icon again to re-enable the pop-up blocker.

Google Toolbar- The Google Toolbar is provided by Google to facilitate searching the web, as well as providing pop-up blocking. This pop-up blocker is part of a menu bar and appears in the browser as follows:

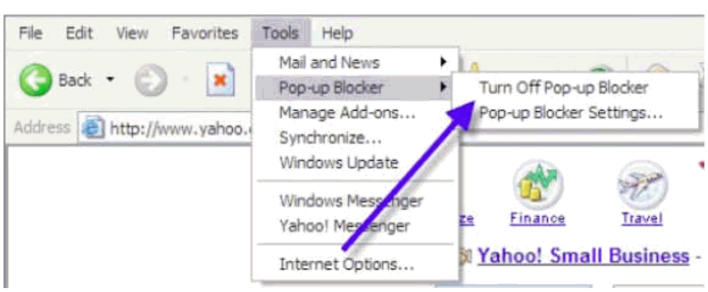
The following icon is the pop-up blocker: 

To allow pop-ups to appear, merely click on the icon. You should now see the following: 

Once this is done, then you should be able to use the online system properly. Once you are finished using the online system, you can click the icon again to re-enable the pop-up blocker.

Microsoft Windows XP Service Pack 2 (SP2)- With the release of Microsoft's service pack 2 for Windows XP, pop-up blocking is now directly integrated into Internet Explorer. Note that, by default, pop-up blocking is enabled within Internet Explorer.

To disable the pop-up blocker while on the site, open the **Tools** menu, select the **Pop-up Blocker** option, and select the **Turn Off Pop-up Blocker** option (as shown below):



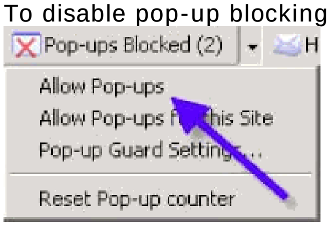
Once this is done, then you should be able to use the online system properly. Once you are finished using the online system, you can go back into the menu again to turn on the pop-up blocker.

Disabling Pop-Up Blockers

MSN Toolbar - MSN Toolbar is the also provided by Microsoft, as part of their online services. This pop-up blocker is part of a menu bar and appears in the browser as follows:

The following icon is the pop-up blocker: 

To disable pop-up blocking, click on the down arrow to the right of the text, which will bring up the following menu:



Click on either the **Allow Pop-ups** or the **Allow Pop-ups for this Site** option. Once this is done, then you should be able to use the online system properly. Once you are finished using the online system, you can go back into the menu again to turn on the pop-up blocker.

Yahoo! Toolbar- The Yahoo! Toolbar is available from Yahoo! as part of their service's offerings. It appears in the browser as follows:

The following icon is the pop-up blocker: 

To disable pop-up blocking, click on the down arrow beside the icon to bring up its menu, as follows:

Click on the **Enable Pop-Up Blocker** option to remove the checkmark beside it, disabling the pop-up blocking. Once this is done, then you should be able to use the online system properly. Once you are finished using the online system, you can go back into the menu again to turn on the pop-up blocker.

If you would like information on other common pop up blockers or need help, please contact the helpdesk at support@tm.marketlinx.com or by calling your local helpdesk number.