Frequently Asked Questions

1. What is Smart Trac?

Smart Trac is a Web-based application that MRMLS members can use to improve the management of their real estate transaction. MRMLS members can use Smart Trac to upload and fax in documents, send and receive documents, place orders, gather common data, and manage communication between parties.

2. Can we use Matrix or iMRMLS and Smart Trac simultaneously?

Yes. Simply minimize both windows to toggle back and forth. Note: You will be logged off of Smart Trac after 20 minutes of inactivity.

3. Is a file a transaction?

Yes. The terms file and transaction are synonymous.

4. If a property is not listed in Matrix or iMRMLS can it be accessed via Public Records?

It can be accessed through public records if it is within Los Angeles, San Bernardino, Riverside, Orange or Ventura Counties.

5. Will importing Public Records overwrite all existing information?

Importing public record information is done to initiate a transaction. The participant then has the option of importing MLS data into the transaction. The user has the option of importing and overwriting existing data, or only importing into blank fields.

6. Can a transaction be automatically initiated through Matrix or iMRMLS?

No.

7. Can you have multiple log-ins with the same user ID?

Yes.

8. When are notifications sent out?

Notifications are sent out whenever a participant is added or removed from a file. A document is uploaded and a user is given permission to view that document, the status of a file in which a user is a participant changes (cancels or closes). A service order that a participant has placed is either accepted or declined by the vendor.

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9. When choosing the phase of escrow, who initiates it?

Only the file admin can change the phase.

10. Do out of area agents have access to the system?

Out of area agents who are not members of MRMLS can only be added to a file by MRMLS members. Out of area agents will not be able to create transactions.

11. What contact programs can be imported into Smart Trac™?

Currently there are none. Smart Trac only allows the user to export their contacts.

12. If a transaction falls out of escrow, do I have to create a new transaction?

No. The participant may decide to simply add a new buyer. However, if to-do items have been completed and documents have been uploaded that are not relevant to the new buyer, the agent may want to start a new transaction.

13. Can out of area agents be added as a service provider participant?

They can be added as a service provider if they offer a service.

14. Can you send comps to an Appraiser?

Yes. You can upload the comps as a document and then share them with the participant(s) of your choice.

15. When a fax is not received, what happens?

The fax is flagged by the Help Desk at First American and uploaded or forwarded to the iMRMLS Help Desk for further action.

16. What will happen if you try and reuse a fax cover sheet?

The new document will not be posted to the transaction.

17. How many times can you use a fax cover sheet?

Only once.

18. What format does the fax get converted into?

The document gets converted into a PDF file.

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19. Is there a phone log?

Yes, it is called the Activity log and is found on the Summary page.

20. What is the purpose of the date and time stamp in the Audit Log?

The date and time stamp in the Activity Log will tell you which participants have viewed a document and the day and time they viewed it. Note: all time stamps are Central Time (CT).

21. How is my personal contact information (personal profile page) updated?

All personal contact information is updated from iMRMLS to Smart Trac. Any updates of personal contact information must be submitted to your association. Updating your personal profile page in Smart Trac will not transfer to iMRMLS or your association.

DOCUMENTS

22. How do I upload a document?

Documents can be uploaded via fax or electronically uploaded through your computer.

23. How long will it take for a document to post in the system once it is faxed?

It takes between 20 minutes to a couple of hours for the fax to be uploaded to the system.

24. How do documents get entered into the computer?

Documents are entered via fax and/or upload. Documents entered via fax require a fax cover sheet.

25. How is a contract shared?

A contract is uploaded by a participant and made accessible (shared)as a document on the same transaction.

26. Can you select which file(s) you would like saved to your CD?

Yes.

27. How do hand-written contracts get entered into the computer?

Documents are entered via fax and/or upload. Documents entered via fax require a fax cover sheet.

Frequently Asked Questions

28. Can documents on Smart Trac be subpoenaed?

Yes. All documents on Smart Trac are admissible in court.

29. When I download my transaction to a CD will it automatically include the activity log?

No. The activity log is not automatically included. However, the log may be printed, faxed into the system and then downloaded to the CD as a separate document.

30. Will a WINForms® document be imported as a PDF or ZFX?

WINForms® documents can be imported as a PDF and a ZFX, but it is advisable to import as a PDF so all parties can view the documents.

31. What if I have an addendum for the same document, does it need a separate fax cover sheet?

Yes.

32. How are permissions to view documents determined?

Permissions to view documents are selected by the Administrator for each individual document and may be changed throughout the transaction.

PARTICIPANTS

33. How are participants notified?

Participants may be notified one of three ways; via fax, email, and/or text message. Participants that have been added to a file are notified by email that includes a username and password in which to log on to the system with and then view the document.

34. How are assistants notified?

Assistants are only notified after being added to transaction with the role of "assistant."

35. For example, how would I ensure my Lender doesn't see the inspection report?

You would remove/disable your lender's permissions to view this document.

36. How will I know when a file I emailed to a participant(s) has been accessed?

If you email the document, you can't determine if the document was accessed. If you fax or upload a document into Smart Trac you can track it through the Activity Log.

37. How would a listing agent add a buyer and create dual roles?

A listing agent would add himself as a seller's agent and then as a buyer's agent to the transaction.

TO-DO LISTS

38. Can you be auto-notified for To-Do list items?

Yes. You can be notified through your chosen method notification type when a To-Do item is about to be due, past due, and/or completed.

39. Can you sort and filter the To-Do list?

Yes. Simply click on the column heading.

40. How do I identify the different items on my To-Do list?

Icons differentiate all items such as documents, participants, and service providers

This indicates that the to-do item is an "Order Service" to-do
This indicates that the to-do item is an "Add Participant" to-do
This indicates that the to-do item is a "Checklist" to-do
This indicates that the to-do item is an "Upload Document" to-do

SERVICE PROVIDERS

41. How will service providers send in documents?

They can upload by using the fax cover sheet or by electronically uploading documents into the system

42. How do I add a service provider that is not currently in the system?

Submit the service provider's information via the enroll link to Smart Trac and it will be entered into the system and approved by our Administrator.