

Quick Reference Guide

For predefined documents complete **Steps 1 - 6** only.

Step 1:

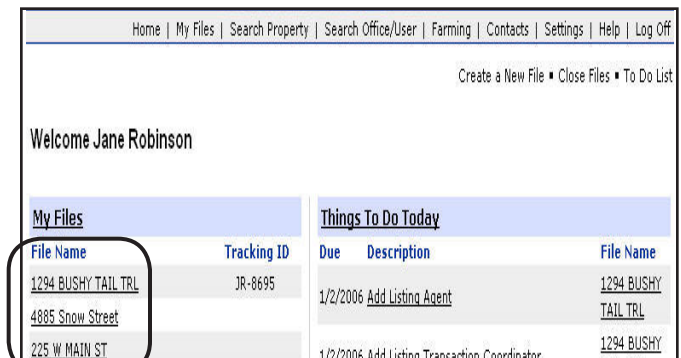
Go to **www.imrmls.com** then log into **MRMLS Matrix** and click on **Smart Trac**.



Click on **Smart Trac**.

Step 2:

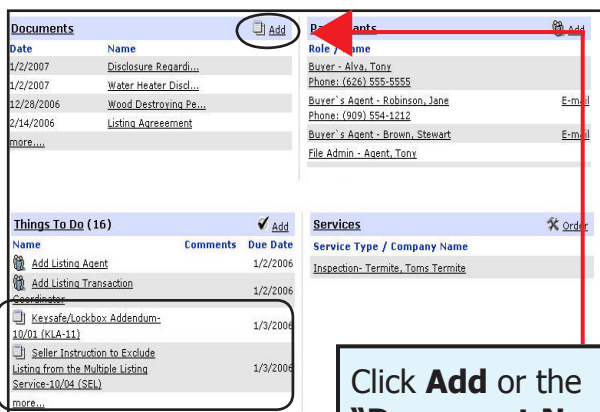
Click the **File name** to Fax any type of document.



Click the **File Name** to fax a document

Step 3:

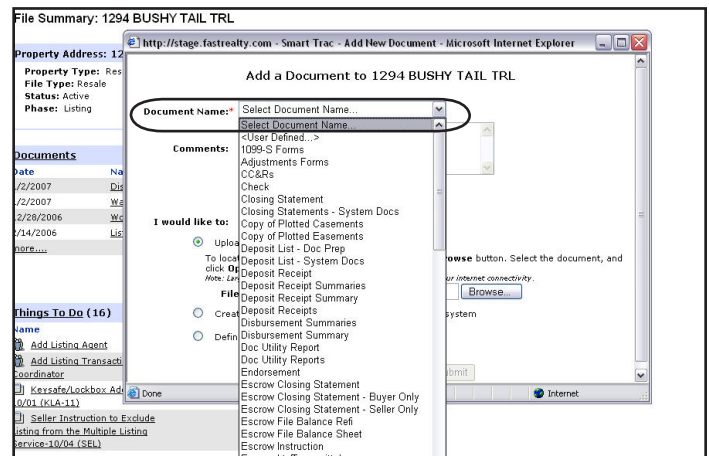
Click **Add** in the Documents section to fax or upload your document, or click the **"document name"** in the Things to Do section.



Click **Add** or the **"Document Name"** to fax a document

Step 4:

Select the document name from the drop-down window. If the document name you are looking for does not exist, select **User Defined** and skip to **Step 7**.



Select **Document Name**

Step 5:

- 1) Use the Comments window to add notes to the document.
- 2) To modify the security levels for a document, click the **Document Details** button and see **Step 7**.
- 3) Check **Create a coversheet to fax a document into the system**.
- 4) Click the **Submit** button.

Step 6:

Click **Print** to print the Fax Cover sheet, place it on top of the document, and fax it to the number on the fax coversheet. **Smart Trac** will associate the document to the right file with a date and time stamp. Click **Close Window**.

Congratulations! Your fax will be uploaded to the system within 30 minutes.

Note: This coversheet can only be used with this document. A copy of this coversheet will be emailed to you, if your notifications are turned on.

Step 7: (Only for User Defined Documents.)

If no other document types fit, create your own **User Defined** document. **Smart Trac** will prompt you to select **Document Details**.

Step 8:

A **Document Name** is required.

Select a **Document Type**. The **Document Type** is the category of document you will be uploading. For this example, I've chosen **Inspection/Repairs**.

Step 9:

1) Enter a **Description** of the document.

2) **Add Comments** to the document.

3) Select the appropriate permission level for each role by checking the box.

View - allows the Participant to view the document only.

Upload - allows the Participant to view and upload documents.

Document Owner - allows the Participant to view, upload and change document security.

In this example, the Buyer has **Upload** and **View** privileges only.

4) **Document Options**

Check to notify participant(s) a document needs to be uploaded.

Check to notify participant(s) a document has been uploaded.

Click **Save Changes**. Complete **Steps 5 & 6** to Upload your Document.

Note: Faxed or Uploaded Documents may not be deleted from the system or file. You may only submit revisions. Make sure you are faxing or uploading the correct document.