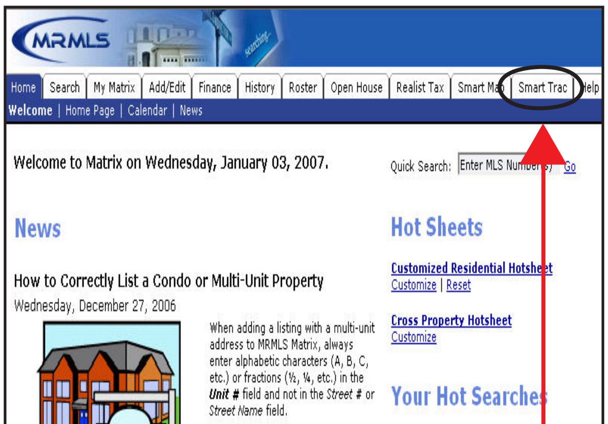
How to Upload a Document

Quick Reference Guide

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

Step 1:

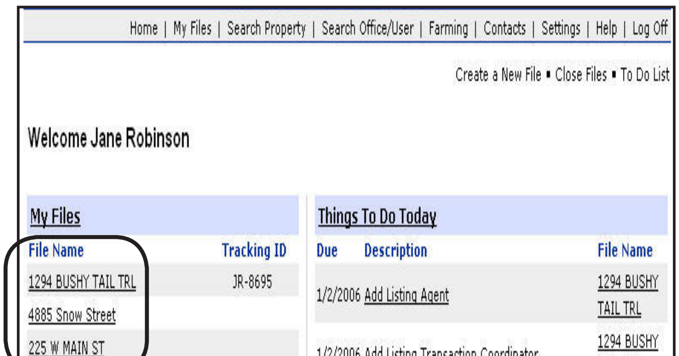
Go to **www.imrmls.com** and Login to **MRMLS Matrix** and click on **Smart Trac**.



Click on **Smart Trac.**

Step 2:

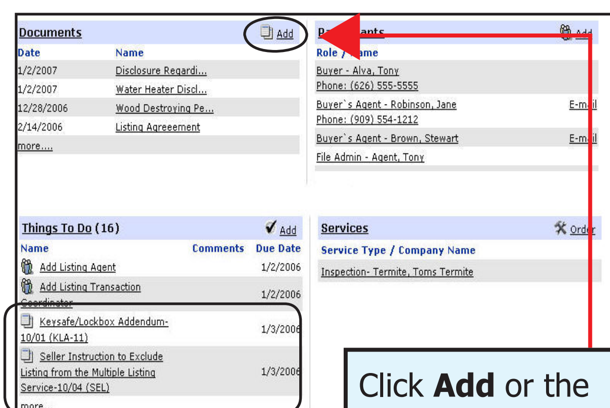
Click the **File Name** to upload any type of document.



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

Step 3:

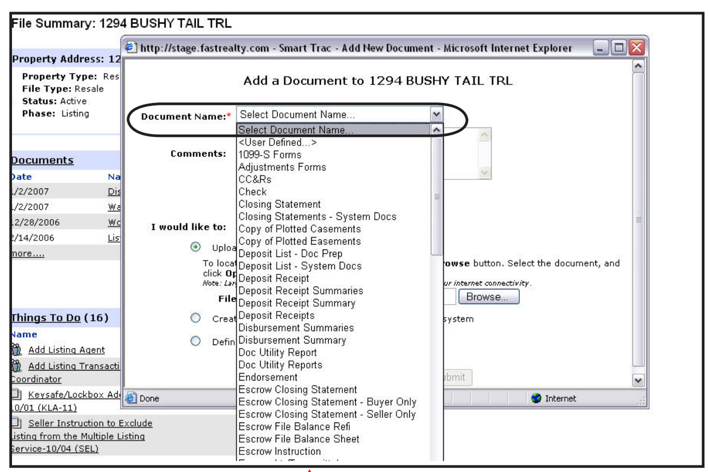
Click **Add** in the Documents section to fax or upload your document, or click the "**document name**" in the Things to Do section.



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

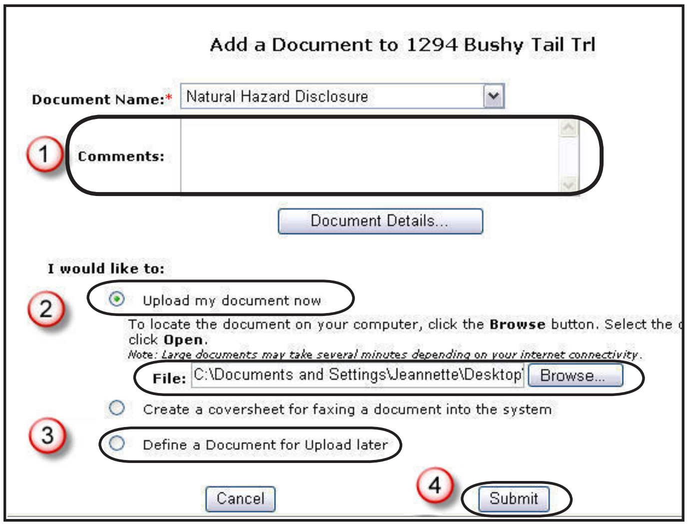
Step 4:

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.

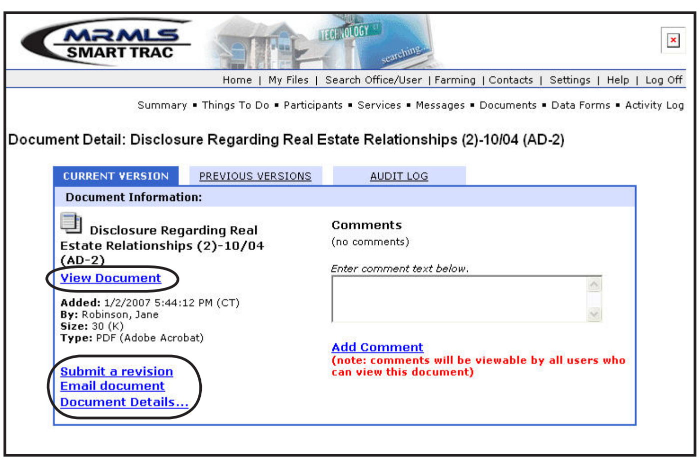
2) Check **Upload my document now** and click **Browse** to locate the document on your computer.

3) **Note**: You can Define a Document for Upload later.

4) Click the **Submit** button.

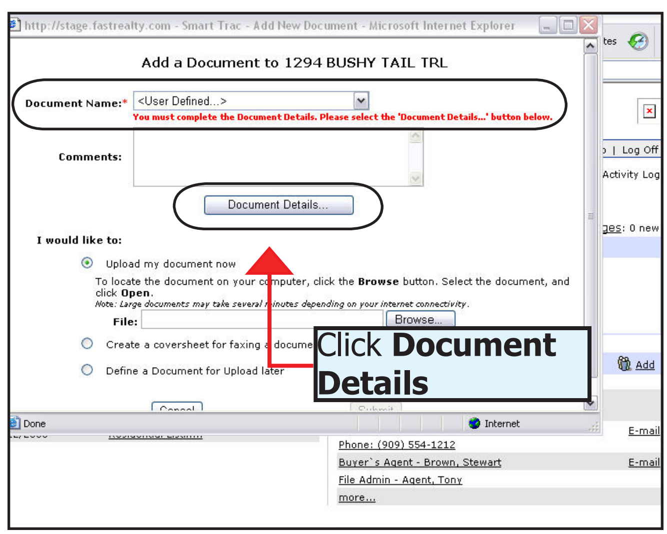
Step 6:

Congratulations! The document is now uploaded and ready to **View, Submit a Revision or Email.** See Quick Reference Guide **How to Email a Document in Smart Trac**.

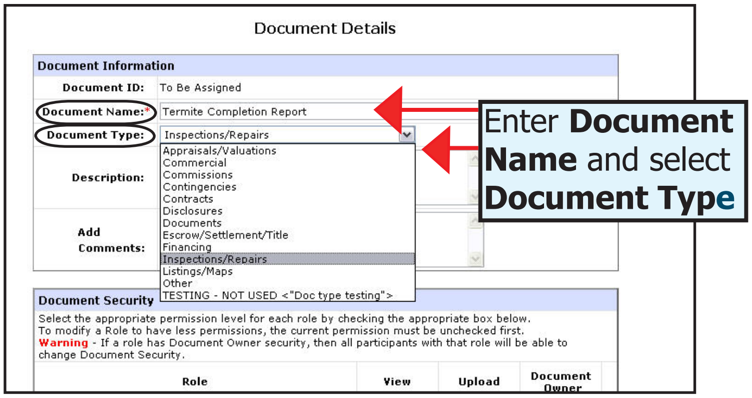


Step 7: (Only for User Defined Documents.)

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



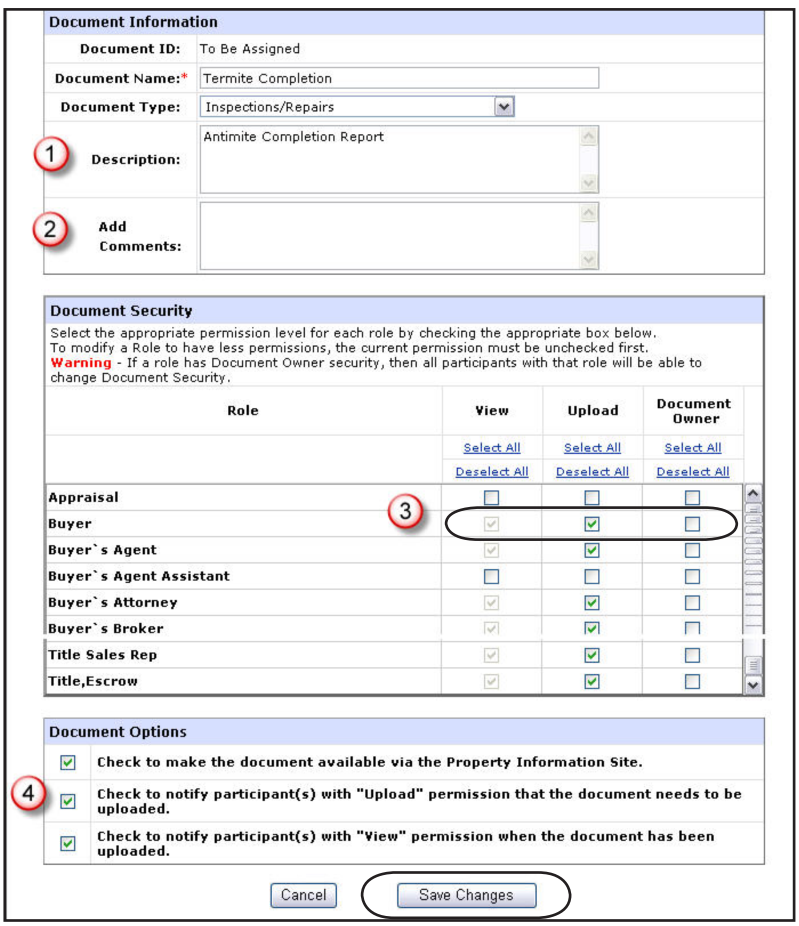
Step 8:



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 docment 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.