



Basic Smart Trac

For Support: (800) 925-1525

Support Hours:

M-F 8:30 am – 9:00 pm

Sat-Sun: 10:00 am – 3:00 pm

www.crmls.org/support

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Introduction

Smart Trac is a feature-rich tool that allows you to electronically manage all of your real estate documents and transactions from start to finish.

Smart Trac is designed to help you work faster and gain a competitive edge by increasing operational efficiency and enhancing client relationships. This allows you to focus on growing your business rather than managing it.

Follow the steps in these sections to get started

- “Disabling Pop-up Blockers for Smart Trac” on page 3
- “Accessing Smart Trac” on page 4
- “Smart Trac Overview” on page 7

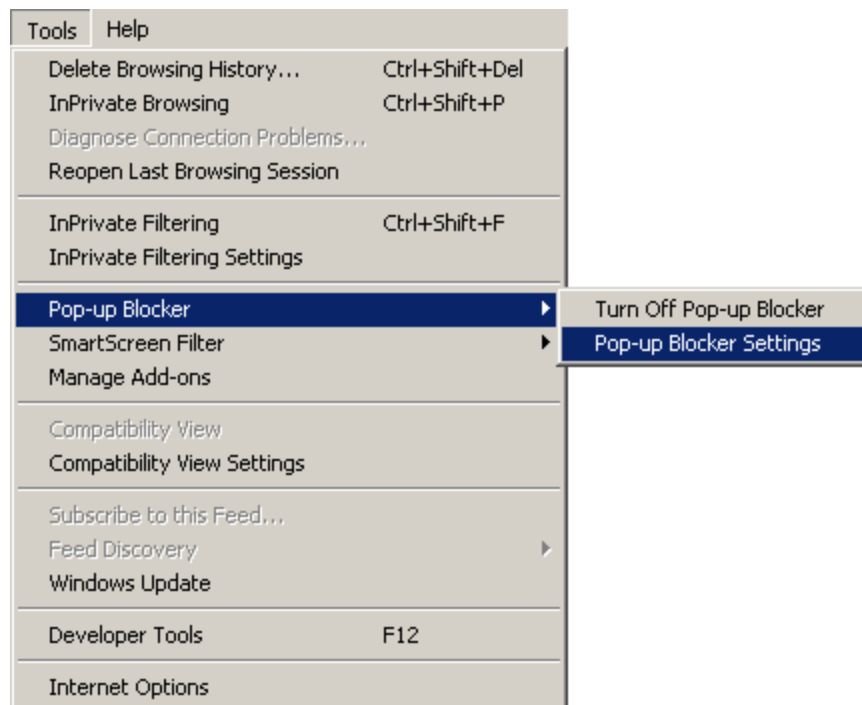
Disabling Pop-up Blockers for Smart Trac

Your computer may have an Internet browser or security software with a pop-up blocker. CRMLS products utilize help screens and other features that may be blocked by some pop-up blockers. Follow the steps below to allow pop-ups from CRMLS products in Internet Explorer.

Note:

For information on allowing pop-ups from CRMLS products in other Internet browsers or security software, refer to your application's documentation.

1. In Internet Explorer, select **Tools > Pop-up Blocker > Pop-up Blocker Settings**.



2. Add the following websites to the Allowed sites list:
 - <http://crmls.org> (CRMLS Website)
 - <http://www.mrmlsmatrix.com> (CRMLS Matrix)
 - <http://realist2.firstamres.com> (Realist Tax)
 - <http://tm.marketlinx.com> (Smart Trac/Smart Fax)

Accessing Smart Trac

Follow the steps below to access Smart Trac.

1. Open your web browser and go to **www.crmls.org**.
2. Click the **CRMLS Matrix** button.

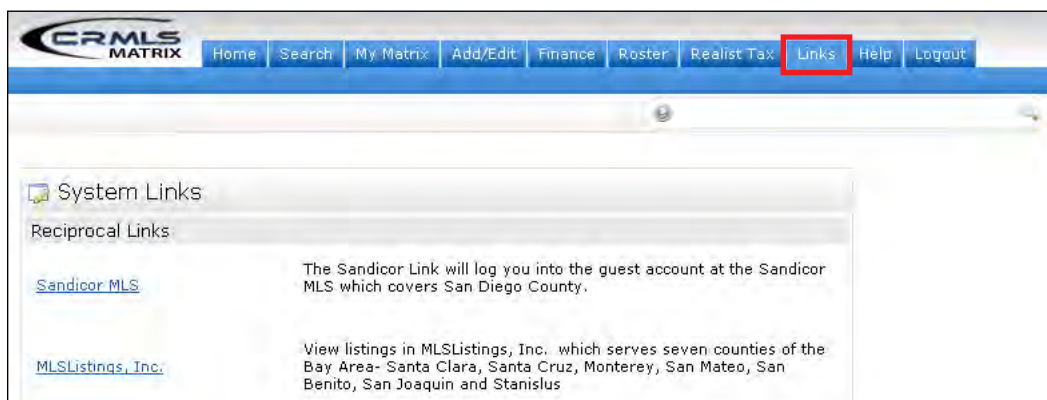


3. Enter your SCOUT Login information and click **Login**.



The image shows the CRMLS SCOUT Login page. At the top, the CRMLS logo is displayed with the text "California Regional Multiple Listing Service, Inc." below it. The page is titled "SCOUT Login". There are two input fields: "User ID:" and "Password:". Below the input fields is a "Login" button with a right-pointing arrow icon.

4. Click the **Links** tab.



The image shows the CRMLS Matrix website interface. The top navigation bar includes the CRMLS MATRIX logo and several menu items: Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, and Logout. The "Links" tab is highlighted with a red box. Below the navigation bar, the page content is titled "System Links" and "Reciprocal Links". There are two links listed:

Link	Description
Sandicor MLS	The Sandicor Link will log you into the guest account at the Sandicor MLS which covers San Diego County.
MLSListings, Inc.	View listings in MLSListings, Inc. which serves seven counties of the Bay Area- Santa Clara, Santa Cruz, Monterey, San Mateo, San Benito, San Joaquin and Stanislaus

5. Click the **Smart Trac** link.

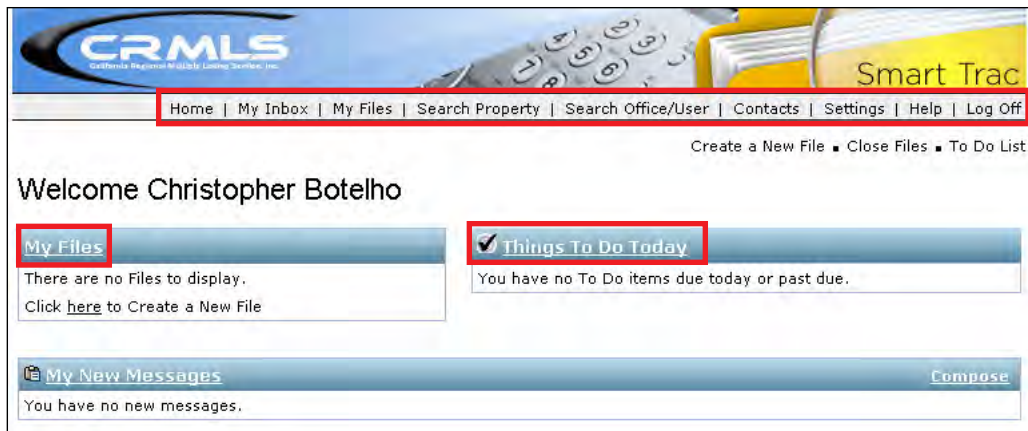
The screenshot shows the CRMLS Matrix website interface. At the top, there is a navigation bar with the following links: Home, Search, My Matrix, Add/Edit, Finance, Roster, Realist Tax, Links, Help, and Logout. Below the navigation bar, the main content area is titled 'System Links'. Under this title, there are two sub-sections: 'Reciprocal Links' and 'Additional Service Links'. The 'Reciprocal Links' section includes links for 'Sandicor MLS' and 'MLSListings, Inc.'. The 'Additional Service Links' section includes links for 'Mercado', 'Smart Fax', 'Realist Tax', 'Smart Trac', 'Listing Book', 'CARETS Commercial', and 'PinPoint'. The 'Smart Trac' link is highlighted with a red rectangular box. Each link is accompanied by a brief description of the service it provides.

Link	Description
Sandicor MLS	The Sandicor Link will log you into the guest account at the Sandicor MLS which covers San Diego County.
MLSListings, Inc.	View listings in MLSListings, Inc. which serves seven counties of the Bay Area- Santa Clara, Santa Cruz, Monterey, San Mateo, San Benito, San Joaquin and Stanislaus
Mercado	Access Mercado to search listings in Northern and Southern California and create CMA, Buyer's Tour & Marketing Flyers.
Smart Fax	Use Smart Fax to receive and store documents electronically..
Realist Tax	Access Realist Tax to find property tax data in all 58 counties of California. Generate a Pre-foreclosure search and Mailing Labels.
Smart Trac	Smart Trac's Transaction Management system allows you to have a centralized virtual access point to handle all your paper work.
Listing Book	Listingbook allows you to setup client accounts. As a result your client can search for listing data which allows you to manage and keep updated on your clients every need.
CARETS Commercial	CARETS Commercial system allows you to add, modify and search for Commercial, Commercial Lease and Business Opportunities listings.
PinPoint	PinPoint combines both listing and tax data on a searchable aerial map.

Note:

You can also access Smart Trac by clicking the Smart Trac link under External Links on the CRMLS Matrix Home screen.

Smart Trac Overview



- **Home**
Click Home to go to the Smart Trac Welcome screen.
- **My Inbox**
Click My Inbox to view your Smart Fax Inbox.
- **My Files**
Click My Files to view your files, create a new file, or close a file.
- **Search Property**
Click Search Property to search for public property record data.
- **Search Office/User**
Click Search Office/User to find other offices and users that have access to Smart Trac.
- **Contacts**
Click Contacts to import and manage your Smart Trac contacts.
- **Settings**
Click Settings to run reports, change your Smart Trac preferences, and customize Things To Do templates.
- **Help**
Click Help to access Smart Trac training, manuals, and support information.
- **Log Off**
Click Log Off to sign out of Smart Trac.
- **Things To Do Today**
Displays a list of items that are due today (organized by transaction).

Creating Files

Smart Trac files represent transactions and the information associated with them. Follow the steps in these section to create a new file, create a file from CRMLS Matrix, and create a file from a property search.

Note:

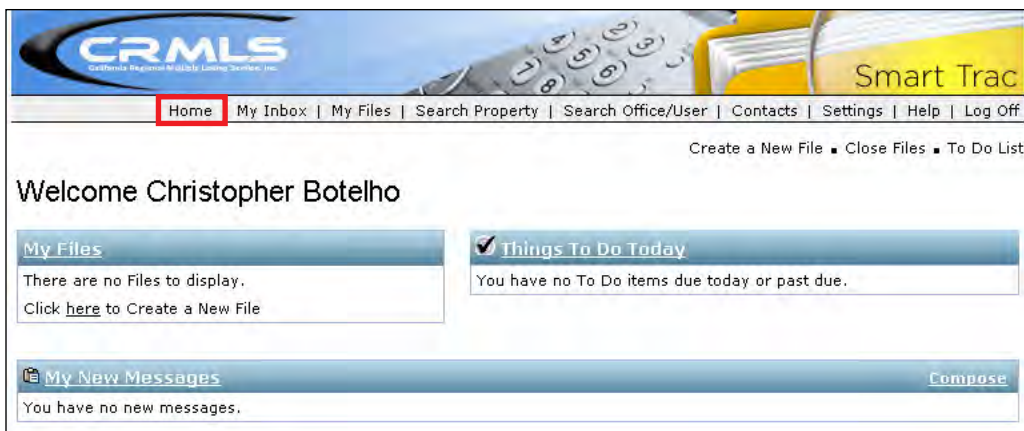
Before you can create a file in Smart Trac, you must attend a Basic Smart Trac training course or pass the on-line Smart Trac exam.

- “Creating a New File” below
- “Creating a File from Your Listing in CRMLS Matrix” on page 11

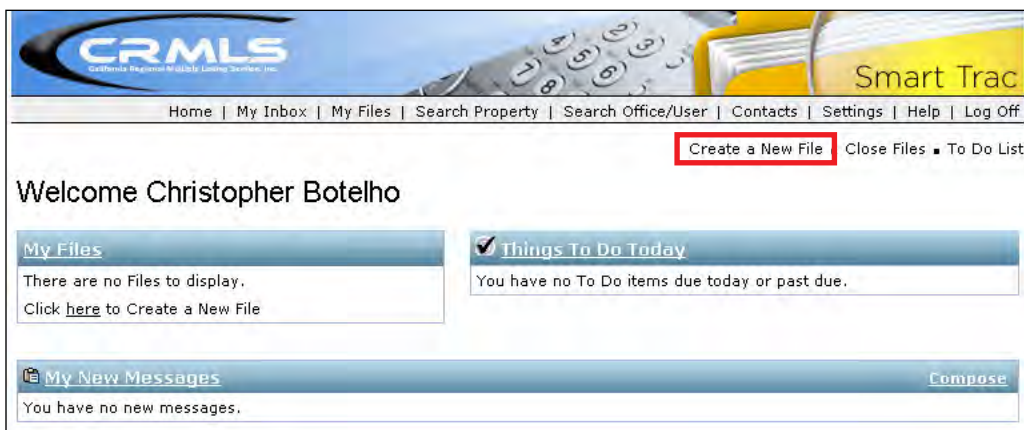
Creating a New File

Follow the steps below to create a new Smart Trac file.

1. Click **Home** to return to the Smart Trac Welcome screen.



2. Click **Create a New File**.



3. Enter the **Required File Information** and select the role you will have in the transaction.

CRMLS
Smart Trac

Home | My Inbox | My Files | Search Property | Search Office/User | Contacts | Settings | Help | Log Off

Create New File

* = Required Fields

Copy from Existing File

Data, documents and participants can be copied from an existing File. Start by searching for the existing File. If you also use the MLS Import option, MLS data will overwrite data copied from the existing File.

Search Criteria: Filter By: Active

Optional MLS Data Import

Enter the MLS Number and select a listing source then click **Import** to retrieve data and primary photo.

MLS Number: *

MLS: MRMLS - Multi Regional MLS *

User Name: *

Password: * Remember me.

Required File Information

Enter the following information to create a new File.

Your Role: Buyer's Agent *

File Type: Resale *

Property Type: Select a Property Type *

Initial Phase: Select a Phase *

Street Address: *

File Name: Use Street Address for Name
 or Enter Name *

Property State/Province: California *

Property County: Los Angeles *

Note:
Required fields are indicated with a red asterisk.

4. Fill out any additional information for the property.

Optional File Information

The following information is optional. You may enter it now, or you can skip this section now and enter the information later. This form can be accessed at any time from the Filesummary page.

ShowingInstructions:

City:


Zip:


Escrow Number:


MLS Number:

APN:

Title Number:


Contract Acceptance Date: 


Listing Date: 


Listing Expiration Date: 

List Price:

Sale Price:



Escrow Opened Date: 

Escrow Closing Date Target: 

Escrow Closing Date Actual: 

5. Click **Save**.

You see the file Summary page:

[Home](#) | [My Inbox](#) | [My Files](#) | [Search Property](#) | [Search Office/User](#) | [Contacts](#) | [Settings](#) | [Help](#) | [Log Off](#)

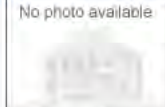
[Summary](#) ■ [Things To Do](#) ■ [Participants](#) ■ [Services](#) ■ [Messages](#) ■ [Documents](#) ■ [Data Forms](#) ■ [Activity Log](#)

Summary

[Archive Report](#) | [Import/Update](#) | [Admin](#) | [Messages: 0 new](#)

Smith

No photo available



Property Address: 6854 Blackwood St, 7, Riverside County, CA

Property Type: Residential- SFR

File Type: Resale

File Status: [Active](#)

Phase: [Listing](#)


Settlement/Escrow#: unknown

Title #: unknown


Target Close: unknown

MLS#: unknown

Tracking ID: [Not Assigned](#)

 **Documents** [Add](#)


(none)

 **Participants** [Add](#)

Role / Name	E-mail
Buyer's Agent	E-mail
File Admin	E-mail

Things To Do (0) [Add](#)

You have not yet selected a To Do List Template for this File. Click [here](#) to select a template now.

 **Services** [Order](#)

No services have been ordered click [here](#) to order services.

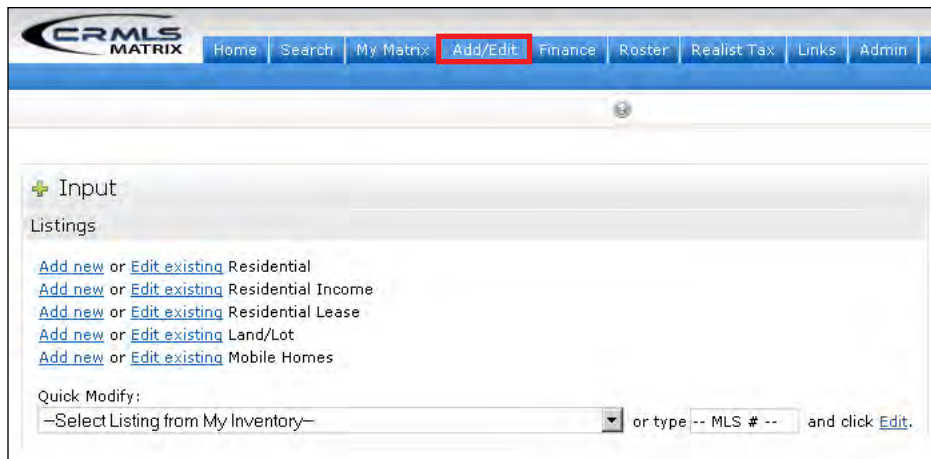
Next Steps:

1. Add a Things To Do list (page 13)
2. Add items to your Things To Do list (page 16)
3. Upload Documents (page 19)
4. Add Participants (page 29)

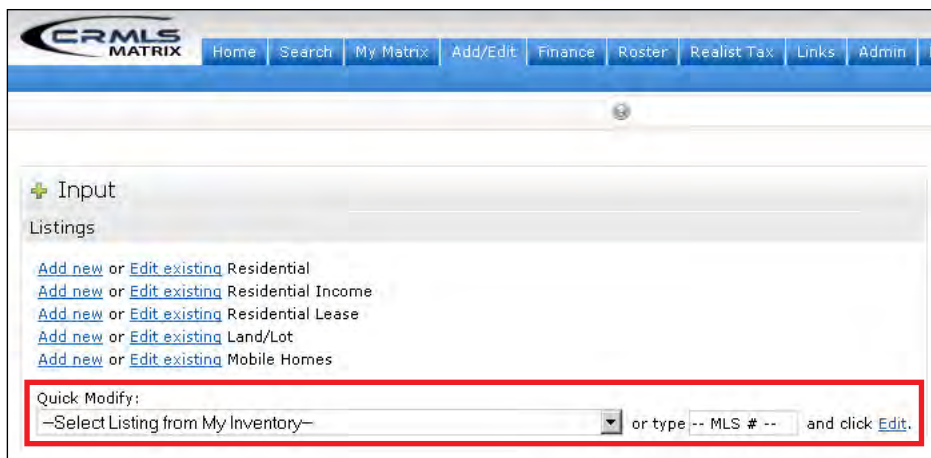
Creating a File from Your Listing in CRMLS Matrix

CRMLS Matrix and Smart Trac allows you to automatically generate Smart Trac files for your listing in CRMLS Matrix. After your listing has been successfully added to CRMLS Matrix, follow the steps below to create a new file from your listing.

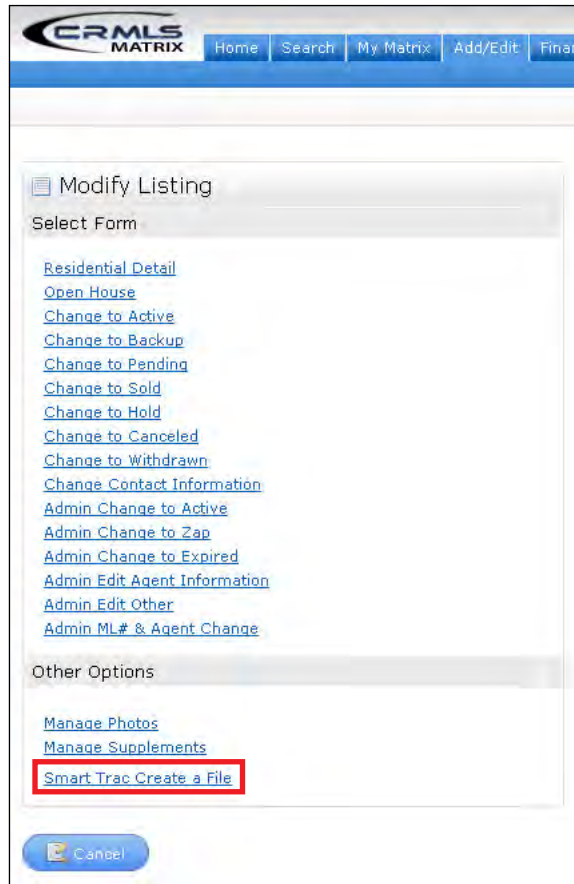
1. Click the **Add/Edit** tab in Matrix.



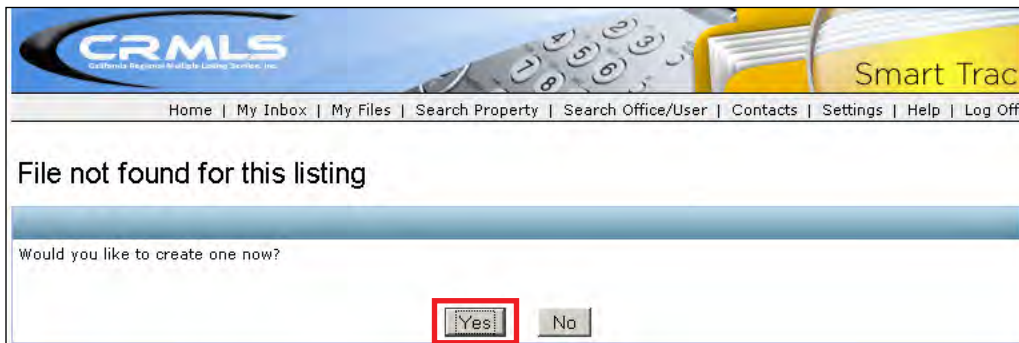
2. Select your listing in the Quick Modify drop-down menu or type the MLS number of your listing in the field. Then click **Edit**.



3. Click **Smart Trac Create a File**.



4. Click **Yes** when Smart Trac asks if you would like to create a new file.



Next Steps:

1. Add a Things To Do list (page 13)
2. Add items to your Things To Do list (page 16)
3. Upload Documents (page 19)
4. Add Participants (page 29)

Adding and Working from To Do Lists

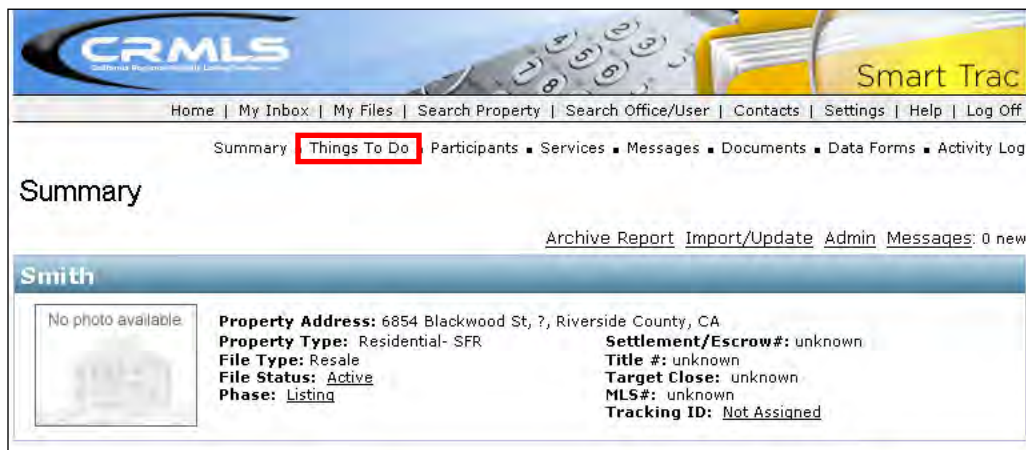
Follow the steps in these sections to add a To Do List to a file, add items to a To Do List, and work from a To Do List.

- “Adding a To Do List to a File” on page 13
- “Adding an Item to a To Do List” on page 16
- “Working with To Do Lists” on page 18

Adding a To Do List to a File

Smart Trac's Things To Do templates help you stay organized and track common tasks associated with a transaction. When you create a file or change a file's phase, Smart Trac automatically updates the To Do list. You can also add or remove items from the Things To Do list at any time.

1. From the file Summary screen, click **Things To Do**.



Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Click **Add From Template**.



3. Select a template from the Template drop-down menu.

A screenshot of the 'Add To Dos' form. The title is 'Add To Dos'. Below the title is the instruction: 'Select the Template you wish to apply to this File, enter the required dates, and then click Next.' The form contains a 'Template:' label followed by a dropdown menu showing 'Listing Template' and a red asterisk. To the right of the asterisk is the text '* Required Fields'. Below this is a blue header bar with the name 'Smith'. Underneath is a 'Listing Date' label followed by an empty date input field with a calendar icon and a red asterisk, with the format '(mm/dd/yyyy)' to its right. At the bottom of the form are two buttons: 'Cancel' and 'Next'.

4. Enter information in the required fields for the template you selected.

Note:

Required fields are indicated with a red asterisk.

5. Click **Next**.

You see the Verify To Do List screen:

Verify To Do List

Listed below are the To Do Items from the Template you selected. Use the checkboxes on the left to de-select any items that do not apply to this File. You may adjust the Due Date three ways, either change the 'Number of Days' and the system will automatically recalculate the Due Date, manually change the Due Date, or click the To Do name to edit the To Do. Click Refresh Due Dates if you edit To Dos.

[Refresh Due Dates](#)

<input checked="" type="checkbox"/>	Description	Number of Days	Date Used for Calculation	Due Date
<input checked="" type="checkbox"/>	<input type="checkbox"/> Disclosure Regarding Real Estate Relationships (2)-10/04 (AD-2)	<input type="text" value="0"/>	Days after Listing Date	11/17/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Estimated Seller's Proceeds -10/2000 (ESP-11)	<input type="text" value="1"/>	Days after Listing Date	11/18/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Get Duplicate Keys - File & Office Set	<input type="text" value="1"/>	Days after Real Estate Transfer Disclosure Statement-10/03 (TDS)	11/19/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Homeowner Association Information Request-10/02 (HOA)	<input type="text" value="5"/>	Days after Listing Date	11/22/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Just Listed Cards	<input type="text" value="4"/>	Days after Listing Date	11/21/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Keysafe/Lockbox Addendum-10/01 (KLA-11)	<input type="text" value="1"/>	Days after Listing Date	11/18/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Lead-Based Paint and Lead-Based Paint Hazard-1/03 (FLD)	<input type="text" value="2"/>	Days after Listing Date	11/19/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Listing Agent to fill out Transaction Summary Form	<input type="text" value="1"/>	Days after Listing Date	11/18/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Natural Hazard Disclosure Statement-10/04 (NHD)	<input type="text" value="15"/>	Days after Listing Date	12/02/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Order For Sale Sign	<input type="text" value="1"/>	Days before Listing Date	11/16/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Order Pre-Sale City 9A Report	<input type="text" value="5"/>	Days after Listing Date	11/22/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Order Termite Report	<input type="text" value="15"/>	Days after Listing Date	12/02/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Place advertisements	<input type="text" value="3"/>	Days after Listing Date	11/20/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Real Estate Transfer Disclosure Statement-10/03 (TDS)	<input type="text" value="1"/>	Days after Listing Date	11/18/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Residential Listing Agreement- Exclusive- 10/04 (RLA)	<input type="text" value="1"/>	Days before Listing Date	11/16/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Schedule caravan	<input type="text" value="8"/>	Days after Listing Date	11/25/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Schedule Open House	<input type="text" value="3"/>	Days after Listing Date	11/20/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Seller Instruction to Exclude Listing from the Multiple Listing Service-10/04 (SEL)	<input type="text" value="1"/>	Days after Listing Date	11/18/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Smoke Detector Statement of Compliance- 4/99 (SDS-11)	<input type="text" value="1"/>	Days after Listing Date	11/18/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Statewide Buyer and Seller Advisory- 10/04 (SBSA)	<input type="text" value="1"/>	Days after Listing Date	11/18/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Thank you for the listing!	<input type="text" value="3"/>	Days after Listing Date	11/20/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Water Heater Statement of Compliance-4/99 (WHS-11)	<input type="text" value="1"/>	Days after Listing Date	11/18/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Weekly update to seller	<input type="text" value="7"/>	Days after Listing Date	11/24/2010
<input checked="" type="checkbox"/>	<input type="checkbox"/> Wood Destroying Pest Inspection and Allocation of Cost Addendum-10/02 (WPA)	<input type="text" value="0"/>	Days after Listing Date	11/17/2010

- Remove any unnecessary items by unchecking the checkbox to the left of the items you want to remove.
- Make changes to the Due Dates as necessary.
- Click **Refresh Due Dates** update the Due Dates.

Verify To Do List

Listed below are the To Do Items from the Template you selected. Use the checkboxes on the left to de-select any items that do not apply to this File. You may adjust the Due Date three ways, either change the 'Number of Days' and the system will automatically recalculate the Due Date, manually change the Due Date, or click the To Do name to edit the To Do. Click Refresh Due Dates if you edit To Dos.

[Refresh Due Dates](#)

<input checked="" type="checkbox"/>	Description	Number of Days	Date Used for Calculation	Due Date
<input checked="" type="checkbox"/>	Disclosure Regarding Real Estate Relationships (2)-10/04 (AD-2)	<input type="text" value="0"/>	Days after Listing Date	11/17/2010
<input checked="" type="checkbox"/>	Estimated Seller's Proceeds -10/2000 (ESP-11)	<input type="text" value="1"/>	Days after Listing Date	11/18/2010
<input checked="" type="checkbox"/>	Get Duplicate Keys - File & Office Set	<input type="text" value="1"/>	Days after Real Estate Transfer Disclosure Statement-10/03 (TDS)	11/19/2010

- When you're done making changes, click **Finish**.

Adding an Item to a To Do List

Follow the steps below to add a new To Do a Things To Do list.

- From the file Summary screen, click **Things To Do**.

The screenshot shows the CRMLS Smart Trac interface. At the top, there is a navigation bar with links: Home | My Inbox | My Files | Search Property | Search Office/User | Contacts | Settings | Help | Log Off. Below this, a secondary navigation bar shows: Summary | **Things To Do** | Participants | Services | Messages | Documents | Data Forms | Activity Log. The main content area is titled 'Summary' and includes links for 'Archive Report', 'Import/Update', 'Admin', and 'Messages: 0 new'. Below the summary, there is a section for 'Smith' with a placeholder for a photo and the following details:

- Property Address:** 6854 Blackwood St, ?, Riverside County, CA
- Property Type:** Residential- SFR
- File Type:** Resale
- File Status:** Active
- Phase:** Listing
- Settlement/Escrow#:** unknown
- Title #:** unknown
- Target Close:** unknown
- MLS#:** unknown
- Tracking ID:** Not Assigned

Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Click **Add New To Do**.



3. Enter the To Do Information.

Add New To Do

Complete the information below to create your new To Do Item. When you have completed the information click **Save**. To exit this screen without saving changes click **Cancel**.

* Required fields

To Do Information

Description: *

Type: *

Category: *

Due Date Dependency:

Transaction Date: # Days

To Do: # Days

Document Upload Date: # Days

Calendar Date:

Security

Add Roles to the Permissions List to allow participants to view and complete this To Do Item.

Available Roles

- Appraisal
- Buyer
- Buyer's Agent
- Buyer's Agent Assistant
- Buyer's Attorney
- Buyer's Broker
- Buyer's Lender
- Buyer's Loan Processor
- Buyer's Office Assistant
- Buyer's Office Manager

Check here to allow all Participants to view this To Do Item.
Participants with view and complete rights:

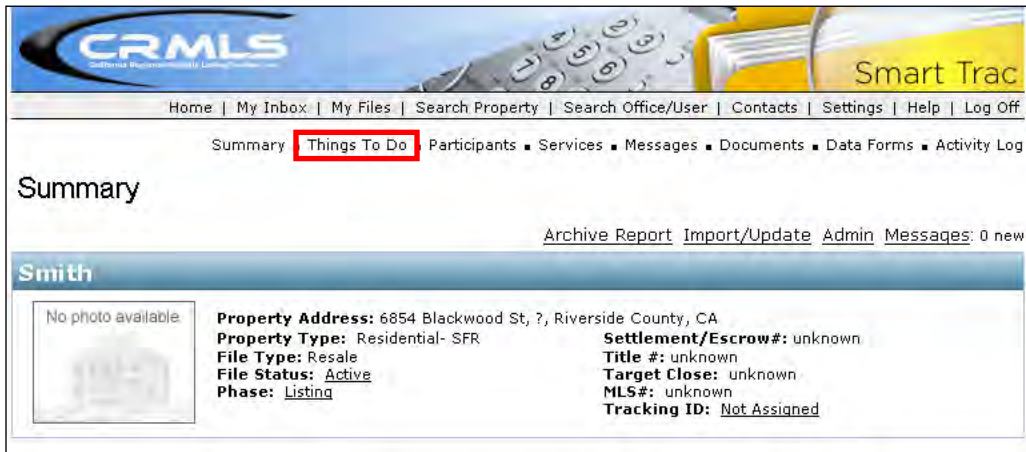
Note:
Required fields are indicated with a red asterisk.

4. Select Security settings as necessary.
5. Click **Save** to add the To Do to your Things To Do List.

Working with To Do Lists

Follow the steps below to mark items as complete on your Things To Do list.

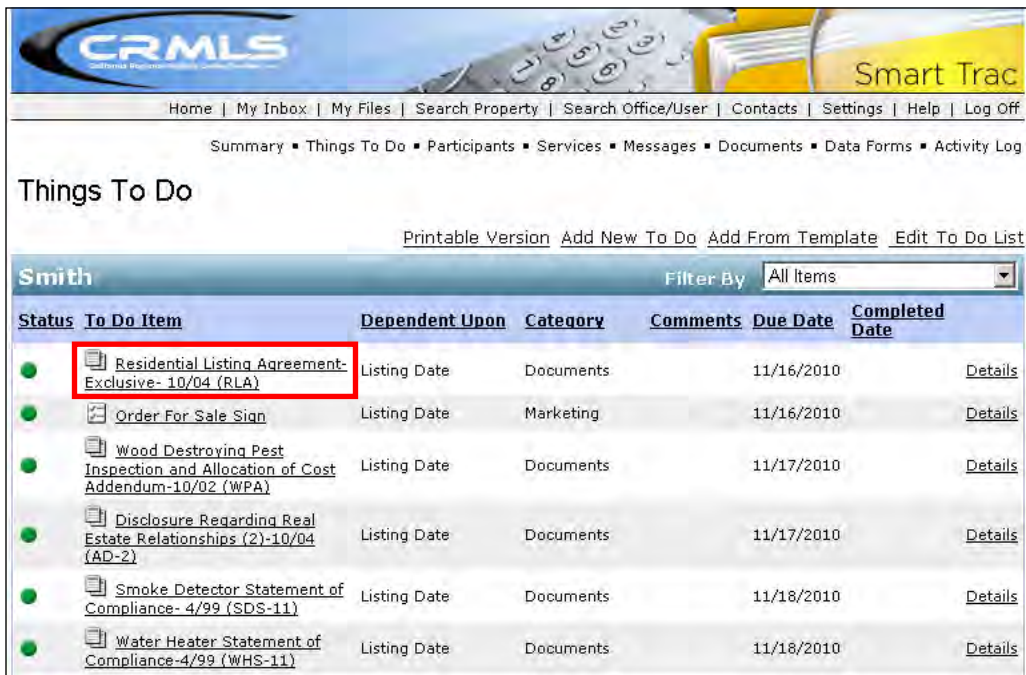
1. From the file Summary screen, click **Things To Do**.



Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Click the To Do Item you want to mark as complete.



3. Follow the prompts on the screen to mark the item as completed.

Once an item has been completed, the item will have a checkmark next to the description. You can also view the item's completion date in the Completed Date column.

Managing Documents

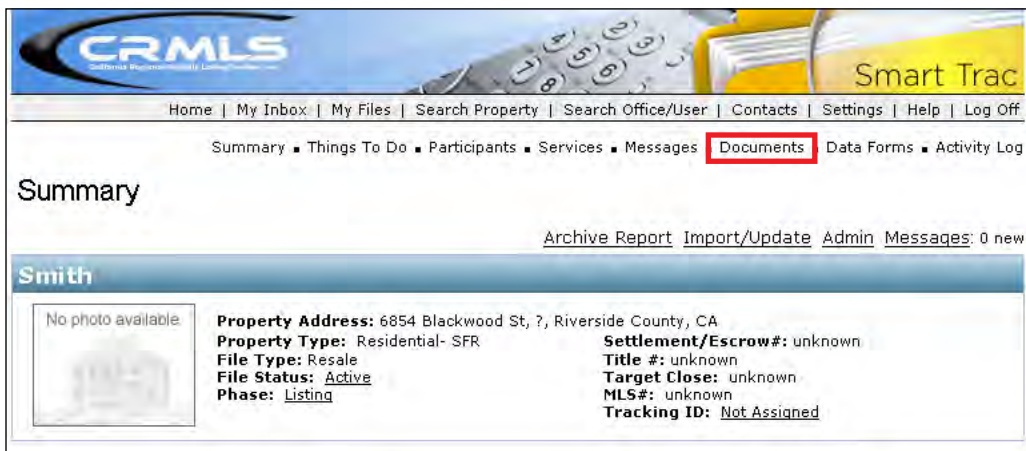
Follow the steps in these sections to manage documents in Smart Trac.

- “Adding a New Document” below
- “Uploading a Document” on page 20
- “Moving Files from Smart Fax” on page 23
- “Creating Document Packages” on page 26

Adding a New Document

From the Summary page of the Transaction click Documents

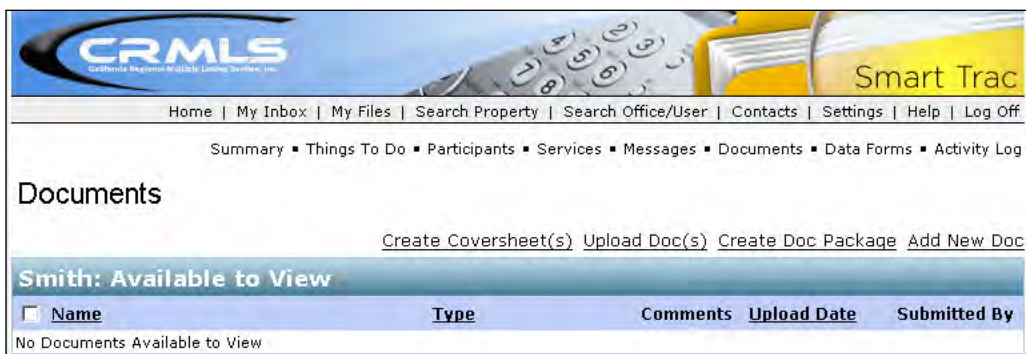
1. From the file Summary screen, click **Documents**.



Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Click **Add New Doc**.



3. Select the document Name from the drop-down list.

Add a Document

Document Settings and Permissions

Smith

Please select a document name from the list.

Name:

Cancel Next

4. Follow the steps on the screen to upload, fax, or create a placeholder for the document.
The new document appears in the Available To View or Pending Upload documents list.

Uploading a Document

1. From the file Summary screen, click **Documents**.

CRMLS
California Real Estate License

Smart Trac

Home | My Inbox | My Files | Search Property | Search Office/User | Contacts | Settings | Help | Log Off

Summary | Things To Do | Participants | Services | Messages | **Documents** | Data Forms | Activity Log

Summary

Archive Report Import/Update Admin Messages: 0 new

Smith

No photo available.

Property Address: 6854 Blackwood St, ?, Riverside County, CA
Property Type: Residential- SFR
File Type: Resale
File Status: Active
Phase: Listing

Settlement/Escrow#: unknown
Title #: unknown
Target Close: unknown
MLS#: unknown
Tracking ID: Not Assigned

Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Place a checkmark next to each document you want to upload in the Pending Upload list.

The screenshot shows the CRMLS Smart Trac interface. At the top, there is a navigation bar with links: Home | My Inbox | My Files | Search Property | Search Office/User | Contacts | Settings | Help | Log Off. Below this is a secondary navigation bar: Summary | Things To Do | Participants | Services | Messages | Documents | Data Forms | Activity Log.

The main section is titled "Documents". It includes links: Create Coversheet(s) | Upload Doc(s) | Create Doc Package | Add New Doc.

There are two sections for document management:

- Smith: Available to View**: A table with columns: Name, Type, Comments, Upload Date, Submitted By. It shows "No Documents Available to View".
- Smith: Pending Upload**: A table with columns: Name, Type, Comments, Due Date, Associated To Do. This table contains seven rows, each with a checked checkbox in the Name column. A red box highlights the first row.

<input type="checkbox"/> Name	Type	Comments	Due Date	Associated To Do
<input checked="" type="checkbox"/> Listing Agreement ▾	Listing Agreement		11/16/2010	Residential Listing Agreement-Exclusive-10/04 (RLA)
<input checked="" type="checkbox"/> Wood Destroying Pest Inspection and Allocation of Cost Addendum-10/02 (WPA) ▾	Inspections/Repairs		11/17/2010	Wood Destroying Pest Inspection and Allocation of Cost Addendum-10/02 (WPA)
<input checked="" type="checkbox"/> Disclosure Regarding Agency Relationships ADNo.1,No.2,No.3 ▾	Disclosure		11/17/2010	Disclosure Regarding Real Estate Relationships (2)-10/04 (AD-2)
<input checked="" type="checkbox"/> Smoke Detector Statement of Compliance ▾	Disclosure		11/18/2010	Smoke Detector Statement of Compliance-4/99 (SDS-11)
<input checked="" type="checkbox"/> Seller's Instructions to Exclude Listing from MLS-10/04 (SEL) ▾	Listing Agreement		11/18/2010	Seller Instruction to Exclude Listing from the Multiple Listing Service-10/04 (SEL)
<input checked="" type="checkbox"/> Water Heater Statement of Compliance ▾	Disclosure		11/18/2010	Water Heater Statement of Compliance-4/99 (WHS-11)
<input checked="" type="checkbox"/> Estimated Seller's Proceeds-10/2000 (ESP-11) ▾	Escrow/Settlement/Title		11/18/2010	Estimated Seller's Proceeds-10/2000 (ESP-11)

Note:

The Pending Upload list only appears if you added a Things To Do list to your transaction. To add a Things To Do list to your transaction, see page 13.

3. Click **Upload Doc(s)**.

CRMLS
California Regional Multiple Listing Service, Inc.

Smart Trac

Home | My Inbox | My Files | Search Property | Search Office/User | Contacts | Settings | Help | Log Off

Summary | Things To Do | Participants | Services | Messages | Documents | Data Forms | Activity Log

Documents

[Create Coversheet\(s\)](#) **Upload Doc(s)** [Create Doc Package](#) [Add New Doc](#)

Smith: Available to View

<input type="checkbox"/> Name	Type	Comments	Upload Date	Submitted By
No Documents Available to View				

Smith: Pending Upload

<input type="checkbox"/> Name	Type	Comments	Due Date	Associated To Do
<input checked="" type="checkbox"/> Listing Agreement 7	Listing Agreement		11/16/2010	Residential Listing Agreement- Exclusive- 10/04 (RLA)

You see a window like this one:

Upload Multiple Documents

To locate documents on your computer, click the **Browse** button for each row. Select the document, and click **Open**. Large documents may take several minutes depending on your internet connectivity. Individual file size is limited to 10 megabytes each.

Smith

Document Name	New Comment	File to upload
Listing Agreement	<input type="text"/>	<input type="text"/> Browse...
Wood Destroying Pest Inspection and Allocation of Cost Addendum- 10/02 (WPA)	<input type="text"/>	<input type="text"/> Browse...
Disclosure Regarding Agency Relationships ADNo.1,No.2,No.3	<input type="text"/>	<input type="text"/> Browse...
Smoke Detector Statement of Compliance	<input type="text"/>	<input type="text"/> Browse...
Seller`s Instructions to Exclude Listing from MLS-10/04 (SEL)	<input type="text"/>	<input type="text"/> Browse...
Water Heater Statement of Compliance	<input type="text"/>	<input type="text"/> Browse...
Estimated Seller`s Proceeds- 10/2000 (ESP-11)	<input type="text"/>	<input type="text"/> Browse...

Please note: The upload progress could take several minutes depending on document size, number of documents, connection speed, etc.

4. Click the **Browse** button to locate the document you selected to upload.

5. If you selected multiple files in step 2, repeat step 4 until you have located all of the files you are uploading.

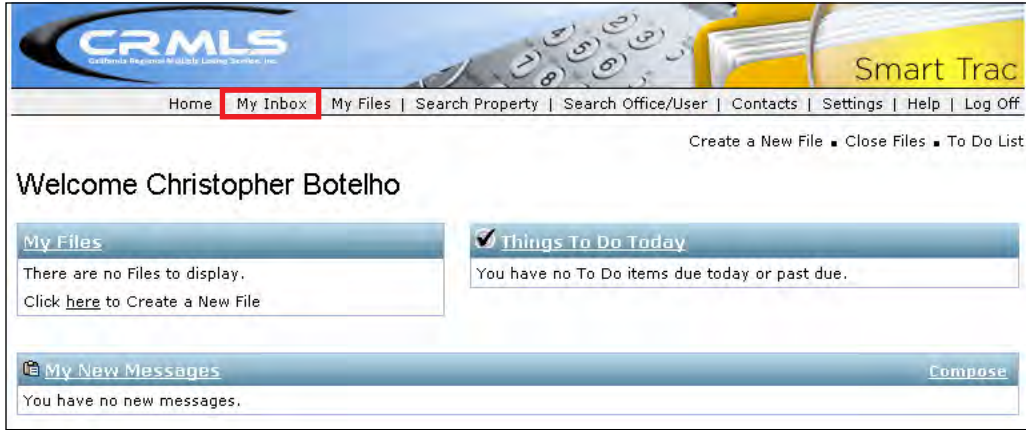
6. Click **Upload**.

The uploaded documents appear in the Available To View documents list.

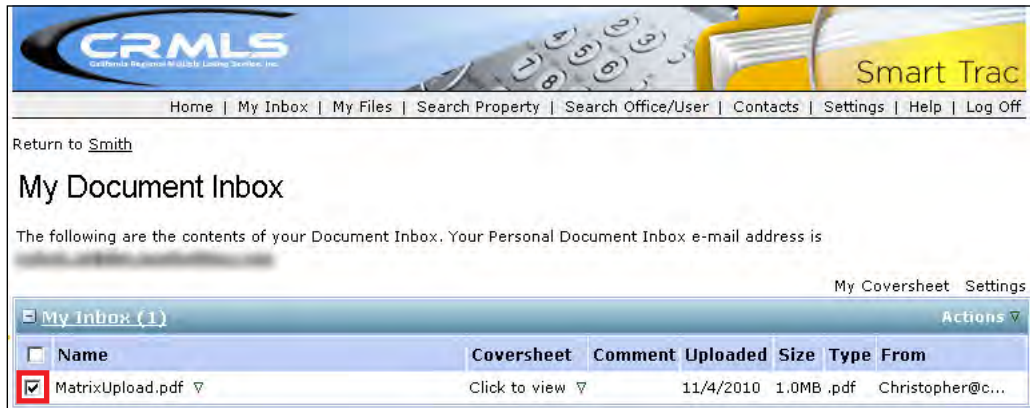
Moving Files from Smart Fax

Smart Fax is your digital faxing solution that works in conjunction with Smart Trac. Documents can be faxed or emailed to the Smart Fax and moved to the transaction open in Smart Trac.

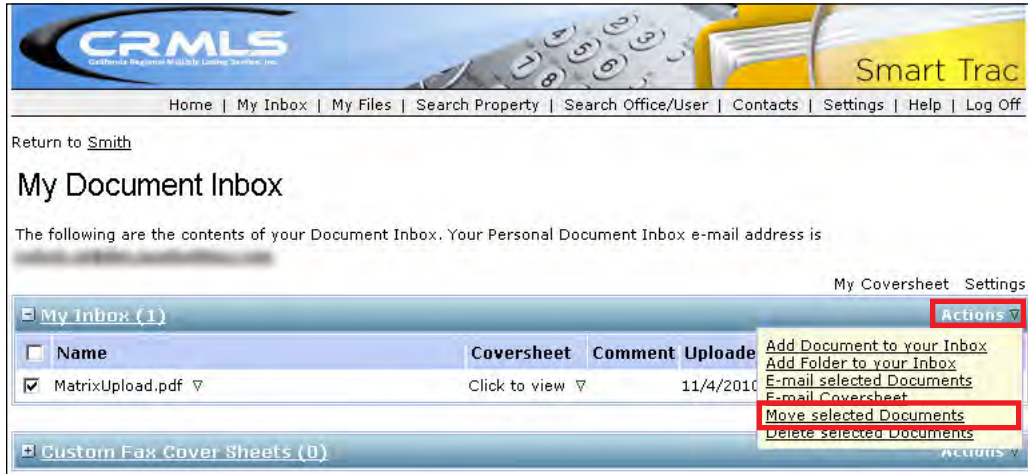
1. Click **My Inbox** to open the Smart Fax Document Inbox.



2. Place a checkmark next to each document you want to move to Smart Trac.



3. Hover your mouse over My Inbox **Actions** and choose **Move Selected Documents**.



4. Select the transaction you want to move the files to.

The screenshot shows the 'Move Inbox Document' dialog box. It has a title bar and several sections. The 'Selected Document' section shows 'MatrixUpload.pdf'. The 'Select Destination' section has three sub-sections: 'Personal Folders' with 'My Inbox' selected, 'Office Folders' with 'CRMLS - Office Inbox' selected, and 'My Files' with 'Smith' selected. The 'My Files' section is highlighted with a red box. The 'Options' section has two radio buttons: 'Move Document to destination, removing it from the Inbox.' (selected) and 'Copy Document. Leave a copy in the original folder.'. At the bottom, there are 'Cancel' and 'Next' buttons.

5. Select one of the following as the Options setting:

- Select **Move Document to destination** to move the document from Smart Fax to the selected Smart Trac file.
- Select **Copy Document** to leave the selected document in Smart Fax and to place a copy of the document in the selected Smart Trac file.

6. Click **Next**.

7. Select a name for the document in the File Name drop-down menu.
8. Enter comments for the document in the Comment field, as necessary.
9. Click **Save** to move or copy the document to Smart Trac.

Move Document to File

Selected File

Smith

Selected Document - My Inbox

Please review the document list below and make any changes to the document settings. When documents are moved they will be converted to a File document and may need to be renamed. Smart Trac has attempted to match the Inbox document name to a corresponding File document name. If a match could not be found then a name will need to be selected.

Inbox Name: MatrixUpload.pdf

File Name: Select Document Name

Comments:

Options

Move Document to destination, removing it from the Inbox.

Copy Document. Leave a copy in the original folder.

Cancel
Back
Save

10. Click the **Return to** link to return to the Summary page of the active transaction.

[Home](#) | [My Inbox](#) | [My Files](#) | [Search Property](#) | [Search Office/User](#) | [Contacts](#) | [Settings](#) | [Help](#) | [Log Off](#)

[Return to Smith](#)

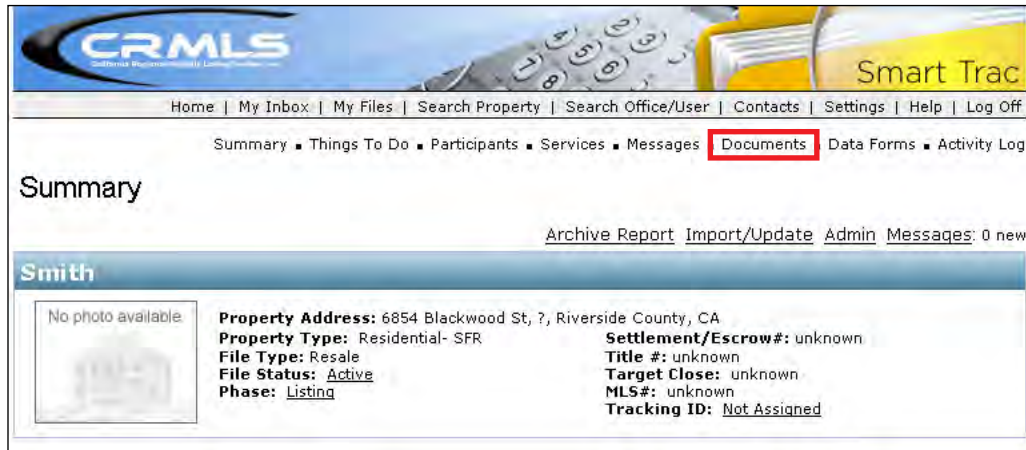
My Document Inbox

The following are the contents of your Document Inbox. Your Personal Document Inbox e-mail address is [\[redacted\]](#)

My Coversheet Settings

My Inbox (1)						Actions
Name	Coversheet	Comment	Uploaded	Size	Type	From
<input type="checkbox"/> MatrixUpload.pdf	Click to view		11/4/2010	1.0MB	.pdf	

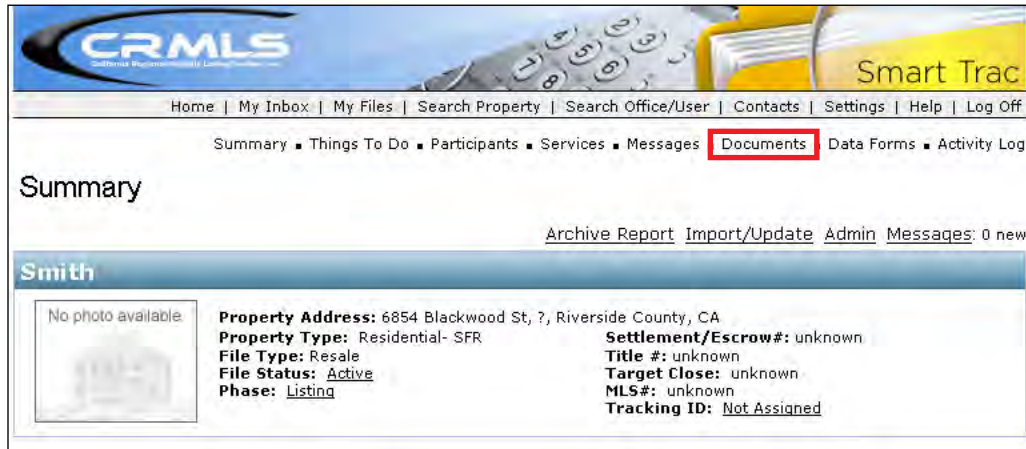
11. Click **Documents** to view the document you just moved or copied from Smart Fax.



Creating Document Packages

Use the Document Package feature to generate a PDF document that incorporates all of the files from the transaction. Once the Document Package has been generated, it can be emailed to other transaction participants.

1. From the file Summary screen, click **Documents**.



Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

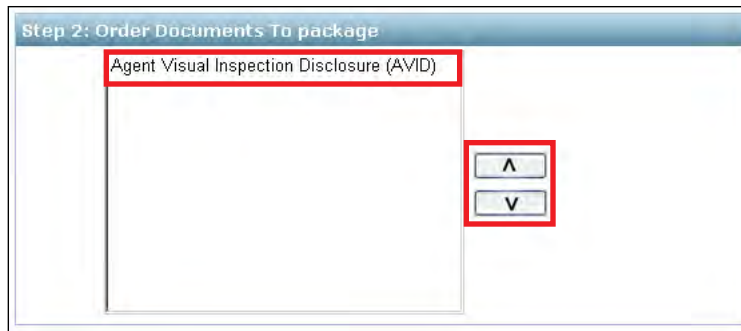
2. Click **Create Doc Package**.

The screenshot shows the CRMLS Smart Trac web application. At the top, there is a navigation bar with links for Home, My Inbox, My Files, Search Property, Search Office/User, Contacts, Settings, Help, and Log Off. Below this is a secondary navigation bar with links for Summary, Things To Do, Participants, Services, Messages, Documents, Data Forms, and Activity Log. The main heading is 'Documents'. Below the heading, there are links for 'Create Coversheet(s)', 'Upload Doc(s)', 'Create Doc Package' (which is highlighted with a red box), and 'Add New Doc'. A user profile bar for 'Smith: Available to View' is visible. Below that is a table with columns for Name, Type, Comments, Upload Date, and Submitted By. One document is listed: 'Agent Visual Inspection Disclosure (AVID)' with a type of 'Disclosure' and an upload date of '11/4/2010'.

3. Place a checkmark next to each documents you want to include in the document package.

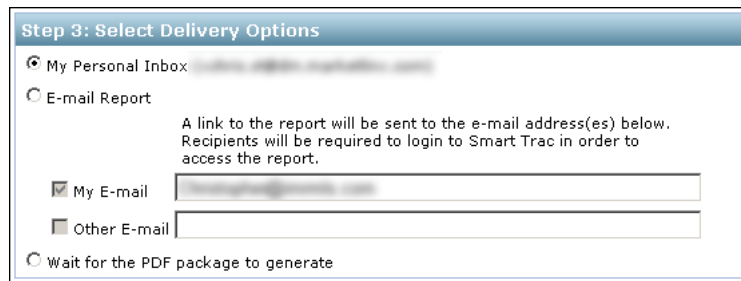
The screenshot shows a multi-step wizard for document packaging. At the top, it states: 'The Document Packaging process will take the selected files and convert them into a single document'.
Step 1: Select Documents To package
This step includes a table with columns: Include File, Name, File Type, File Size, and Upload Date. There are 'Select All' and 'DeSelect All' links. One document is selected with a checkmark in a red box: 'Agent Visual Inspection Disclosure (AVID)', Adobe Acrobat, < 1K, 11-04-10.
Step 2: Order Documents To package
This step shows a list box containing 'Agent Visual Inspection Disclosure (AVID)' and two arrow buttons (up and down) for reordering.
Step 3: Select Delivery Options
This step has three radio button options: 'My Personal Inbox', 'E-mail Report', and 'Wait for the PDF package to generate'. The 'E-mail Report' option is selected. Below it, there is a note: 'A link to the report will be sent to the e-mail address(es) below. Recipients will be required to login to Smart Trac in order to access the report.' There are two input fields: 'My E-mail' and 'Other E-mail'.
Step 4: Select Upload Option
This step has three radio button options: 'Do Not Store this Document Package in the Transaction', 'Add this Document Package as a New Document to the Transaction', and 'Revise an Existing Document in the Transaction with this Document Package'. The first option is selected.
At the bottom, there are 'Generate Report' and 'Reset' buttons.

4. To change the order of the documents in the document package, select a document and click the up or down arrow.



5. Select one of the following document delivery options:

- Select **My Personal Inbox** to send the document package to Smart Fax.
- Select **E-mail Report** to send the document package to the specified email address.
- Select **Wait for the PDF Package to generate** to display the document package in your web browser.



6. Select an Upload Option.



7. When you're done selecting Document Package options, click **Generate Report**.

Depending on the number and size of the documents you selected, it may take some time to generate the Document Package. Do not close the window until the process is complete.

Managing Participants

The Participants feature in Smart Trac allow you to add buyers, sellers, brokers, appraisers, inspectors, and other participants to a real estate transaction. You can also share documents and to do lists with the participants, allowing them to view and upload documents, and complete To Do items. Follow the steps in these sections to manage participants.

“Adding a Buyer or Seller to a Transaction” below

“Adding Other Participants to a Transaction” on page 31

“Removing Participants from a Transaction” on page 33

“Buyer or Seller’s View of a Transaction” on page 34

Adding a Buyer or Seller to a Transaction

1. From the file Summary screen, click **Participants**.



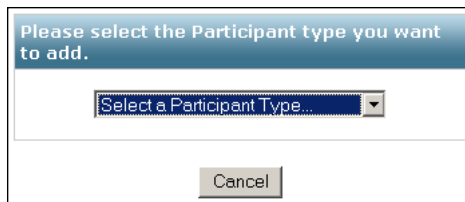
Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Click **Add Participant**.



3. Select Buyer or Seller from the drop-down list.



4. Do one of the following:

- If the buyer or seller you're adding the transaction isn't in your Smart Trac contact list, select **Enter New User Information** and click **Next**.
- If the buyer or seller is in your Smart Trac contact list, or has been a participant in a previous transaction, select **Search for an existing User from my Contact Manager and Previous Transactions**, enter their first and last name, then click **Next**.

Select the radio button next to the user you want to add and click **select**.

5. Follow the prompts on the screen to add a new user or select an existing user.

6. If you added a new user, change the user's notification settings as necessary.

Once you've added a buyer or seller they will receive a welcome email from Smart Trac with login information.

Adding Other Participants to a Transaction

1. From the file Summary screen, click **Participants**.



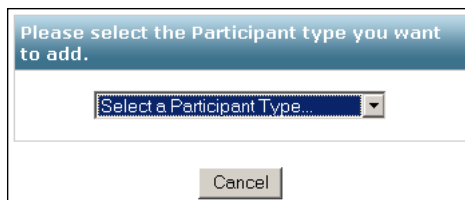
Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Click **Add Participant**.



3. Select the participant's role from the drop-down list.



Note:

If you've added providers to your favorites list, you see a list of your favorite providers for the selected role. To select one of your favorite providers, click the select link in their row to add them to the transaction. No further steps are necessary to add the participant to the transaction.

If you do not want to use one of the your favorite providers, click **Refine Search** to open the Search Office/User screen and proceed to the next step.

4. Search for participants by office or user using the available fields.

Search Participant

Use this screen to search and retrieve offices and users. Enter the Search Criteria to locate the Office and User.

* Required fields must have a minimum of 2 characters

Search Type

Participant Type: **Buyer's Agent**
Search Method: Begins With Exact Match Contains

Office Search Criteria

Company or Office/Branch Name: *

Office City:

Office State/Province:

Service Area State/Province:

Service Area County:

User Search Criteria

Company or Office/Branch Name:

User First Name: *

User Last Name: *

Office City:

Office State/Province:

Service Area State/Province:

Service Area County:

(Either the Users First or Last Name is Required)

Note:

Required fields are indicated with a red asterisk.

5. Click **Select** to add the provider as a participant to the transaction.

CRMLS
Smart Trac

Home | My Inbox | My Files | Search Property | Search Office/User | Contacts | Settings | Help | Log Off

Summary | Things To Do | Participants | Services | Messages | Documents | Data Forms | Activity Log

User Search Results

The following users match your search criteria. Click on Select to add that user as a **Participant**.

[Refine Search](#) [Enroll New Office](#)

Name	Photo	Office	Action
CHAN, JENNIFER		CRMLS 3201 W. TEMPLE AVE. SUITE 250 POMONA, CA 91768	Select Add to Favorites Show Office Roster
CHAN, JENNIFER		CRMLS 3201 W. TEMPLE AVE. SUITE 250 POMONA, CA 91768	Select Add to Favorites Show Office Roster
Chan, Jennifer		CRMLS 3201 W. TEMPLE AVE. SUITE 250 POMONA, CA 91768	Select Add to Favorites Show Office Roster

Note:

If you don't can't find the participant you are searching for, click **Enroll New Office** to add the participant to Smart Trac.

One you've added a provider as a participant they will receive an email notifying them that they have been added to the transaction.

Removing Participants from a Transaction

If you need to remove a participant from a transaction, click the Remove link in the participant's record row. The participant will receive an email notifying them that they have been removed from the transaction.

Note:

File Admins cannot be removed from a transaction.

Buyer or Seller's View of a Transaction

When a buyer or seller is added to a transaction, they will receive a welcome email from Smart Trac with login information.

An account has been created for you on Smart Trac to help you manage your Real Estate transaction online. Smart Trac is the leading online Real Estate Transaction Management system, and will allow you to see the progress of your transaction via your own personalized account on the Smart Trac web site.

Your account has been setup for the following transaction:

Property address: 6854 Blackwood St , CA Property type: Residential- SFR Transaction type: Resale Your role in the transaction: Buyer

To access your account, go to <https://tm.Marketlinx.com/login.asp?loginmls=st> on the Internet, and log on using the following information:

Username: [REDACTED]

Password: [REDACTED]

If you have any questions or more information about the system, please contact your Realtor or Transaction Coordinator.

New Accounts
Smart Trac

Once the buyer or seller has logged in to Smart Trac, they will be able to access their file and view transaction status, associated documents, and items that they need to complete.

The screenshot displays the Smart Trac web application interface. At the top, there is a header with the CRMLS logo and the Smart Trac logo. Below the header, a navigation bar includes a 'Home' link. The main content area is titled 'Welcome' and features a 'More File Information' link. The primary information block for the 'Smith' transaction includes the following details:

- Address:** [REDACTED]
- Settlement/Escrow #:** unknown
- Title #:** unknown
- File Type:** Resale
- Property Type:** Residential- SFR
- File Status:** Active
- Phase:** Listing
- File Created:** 11/4/2010
- Tracking ID:** Not Assigned

Below this information is a 'Documents' section with a table listing various documents:

Date	Name	Submitted By	Due	Comment
11/4/2010	Agent Visual Inspection Disclosure (AVID)	[REDACTED]		
Pending	Wood Destroying Pest Inspection and Alloca...		11/17/2010	
Pending	Disclosure Regarding Agency Relationships ...			

Underneath the documents is a 'Things To Do' section with a table of tasks:

Type	Name	Category	Due	Completed	Comments
Document	Wood Destroying Pest Inspection and Allocation of Cost Addendum-10/02 (WPA)	Documents	11/17		Details
Document	Seller Instruction to Exclude Listing from the Multiple Listing Service-10/04 (SEL)	Documents	11/18		Details

At the bottom, there is a 'Participants' section with a table listing the roles and contact information:

Role	Name/Office	Company	Phone	E-mail
Buyer	[REDACTED]	Smart Trac		[REDACTED]
Buyer's Agent	[REDACTED]	MULTI-REGIONAL MLS	(909) 859-2040	[REDACTED]

Creating Activity Logs

Use the Activity Log feature to add time stamped notes of transaction activities, such as phone conversations. Follow the steps below to add entries to the activity log.

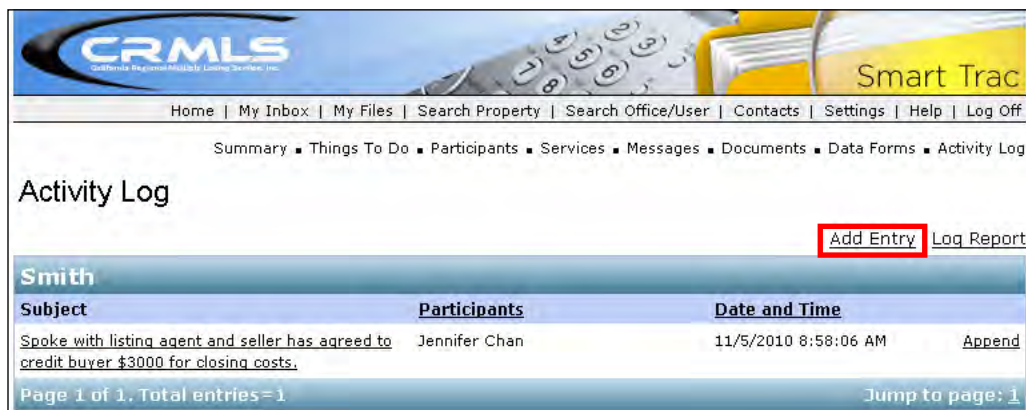
1. From the file Summary screen, click **Activity Log**.



Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Click **Add Entry**.



3. Enter your notes in the Subject field.

4. Select or enter a Contact.

CRMLS
California Real Estate Multiple Listing Service, Inc.

Smart Trac

Home | My Inbox | My Files | Search Property | Search Office/User | Contacts | Settings | Help | Log Off

Summary | Things To Do | Participants | Services | Messages | Documents | Data Forms | Activity Log

Activity Log: Add Entry

[Log Report](#)

Smith

Subject:

Contact: OR **Select Contact** ▼

5. Click **Save** to add the entry to the Activity Log.

Note:

Once you save an entry in the Activity Log, it cannot be deleted.

6. If you need to add additional notes to an existing entry click **Append**.

CRMLS
California Real Estate Multiple Listing Service, Inc.

Smart Trac

Home | My Inbox | My Files | Search Property | Search Office/User | Contacts | Settings | Help | Log Off

Summary | Things To Do | Participants | Services | Messages | Documents | Data Forms | Activity Log

Activity Log

[Add Entry](#) [Log Report](#)

Smith

Subject	Participants	Date and Time	
Spoke with listing agent and seller has agreed to credit buyer \$3000 for closing costs.	Jennifer Chan	11/5/2010 8:58:06 AM	<input type="button" value="Append"/>

Page 1 of 1. Total entries=1 Jump to page: 1

Updating Phase and Status

Follow the steps in these sections to update your transaction's phase or status.

- "Updating the Phase of a Transaction" below
- "Updating the Status of a Transaction" on page 39

Updating the Phase of a Transaction

The phase of a transaction reflects the current stage of the transaction's. The available phases are listing, pending, and closed. Follow the steps below to change the phase of your transaction.

1. From the file Summary screen, click **Admin**.



The screenshot shows the Smart Trac CRMLS interface. At the top, there is a navigation bar with links: Home | My Inbox | My Files | Search Property | Search Office/User | Contacts | Settings | Help | Log Off. Below this is a secondary navigation bar with links: Summary | Things To Do | Participants | Services | Messages | Documents | Data Forms | Activity Log. The main content area is titled "Summary" and includes a sub-navigation bar with links: Archive Report | Import/Update | **Admin** | Messages: 0 new. The "Admin" link is highlighted with a red box. Below the navigation is a section for "Smith" with a placeholder for a photo and a list of property details:

Property Address: 6854 Blackwood St, ?, Riverside County, CA	Settlement/Escrow#: unknown
Property Type: Residential- SFR	Title #: unknown
File Type: Resale	Target Close: unknown
File Status: <u>Active</u>	MLS#: unknown
Phase: <u>Listing</u>	Tracking ID: <u>Not Assigned</u>

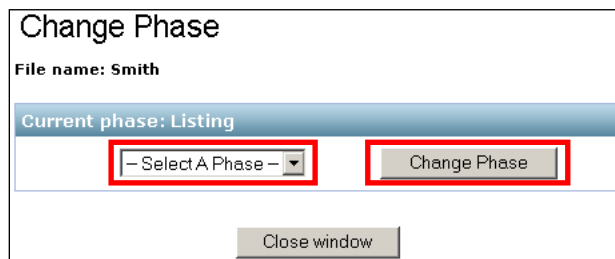
Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Click **Change Phase**.



3. Select a phase from the drop-down menu, then click **Change Phase**.



4. When prompted, enter the required information for the phase you selected.

Note:

Required fields are indicated with a red asterisk.

5. Continue following the prompts on the screen to finish updating the phase of your transaction.

Updating the Status of a Transaction

Follow the steps below to change the status of your transaction to Active, Closed, or Canceled.

1. From the file Summary screen, click **Admin**.



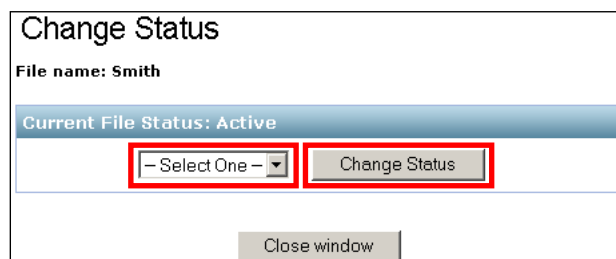
Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Click **Change Status**.



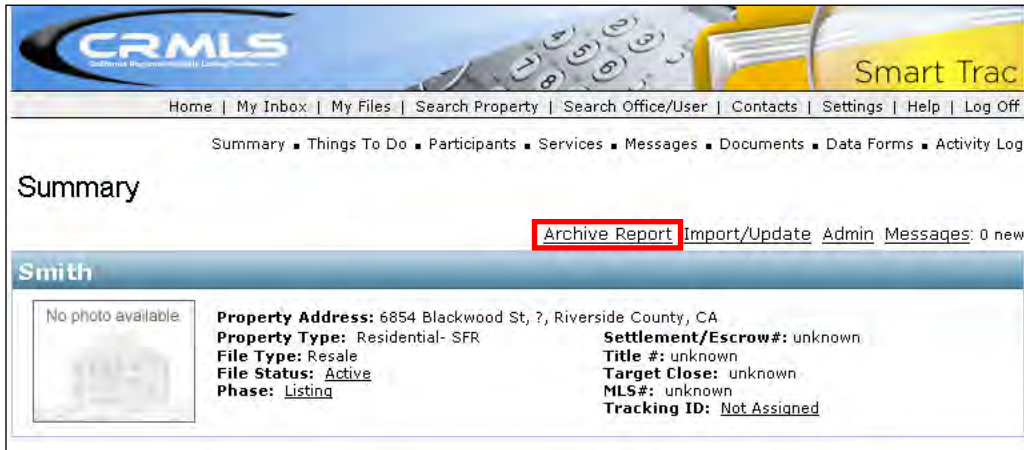
3. Select a status from the drop-down menu, then click **Change Status**.



Creating an Archive Report

Use the Archive Report feature to generate a PDF document that incorporates all portions of a transaction. Once the Archive Report has been generated, a link to the report can be emailed to other transaction participants.

1. From the file Summary screen, click **Archive Report**.



Note:

To access the file summary screen, click **My Files** at the top of Smart Trac. Then select the name of the file you want to open.

2. Select a view from the Choose a view drop-down menu.

Archive Report

The Archive Report allows you to create a document which contains any or all portions of your File. This process will also package the selected documents with the other report sections.

Step 1: Select Type of Report to Run

Choose a View:

Step 2: Select Sections to Include in the Report

<input checked="" type="checkbox"/>	Section	Description
<input checked="" type="checkbox"/>	Cover Page	Company Logo, Name, Address, Branding
<input checked="" type="checkbox"/>	Documents	List of all Documents and Copy of Selected Documents
<input checked="" type="checkbox"/>	Document Audit Logs	List of Document Activity
<input checked="" type="checkbox"/>	Participants	All People Who Had Access to the File
<input checked="" type="checkbox"/>	To Dos	All To Do's

Note:

The view you select should be based on the role of the intended recipient of the report. The view determines which documents will be available for inclusion, and will automatically populate the Prepared For fields.

3. Place a checkmark next to the portions of the transaction you want to include in the report.

Step 2: Select Sections to Include in the Report		
<input checked="" type="checkbox"/>	Section	Description
<input checked="" type="checkbox"/>	Cover Page	Company Logo, Name, Address, Branding
<input checked="" type="checkbox"/>	Documents	List of all Documents and Copy of Selected Documents
<input checked="" type="checkbox"/>	Document Audit Logs	List of Document Activity
<input checked="" type="checkbox"/>	Participants	All People Who Had Access to the File
<input checked="" type="checkbox"/>	To Dos	All To Do's
<input checked="" type="checkbox"/>	Activity Logs	All Logged Activity
<input checked="" type="checkbox"/>	Data Forms	All Additional Data Entered

4. Place a checkmark next to each document you want to include in the report.

Step 3: Select Documents to Include in the Report						
<input checked="" type="checkbox"/>	Name	File Type	# of Revs	File Size	Include all Revisions	Last Upload Date
<input checked="" type="checkbox"/>	Agent Visual Inspection Disclosure (AVID)	.pdf	1	1020KB	<input type="checkbox"/>	11/4/2010 5:23:09 PM

To include all revisions of a document, place a checkmark in the Include all Revisions checkbox.

5. Select your photo and logo options.

Step 4: Select Branding Options	
<input checked="" type="radio"/> Use My Existing Photo	Preview Photo
<input type="radio"/> Upload Another Photo	Upload Photo
<input type="radio"/> Do Not Use a Photo	
<input checked="" type="radio"/> Use My Existing Office Logo	Preview Logo
<input type="radio"/> Upload Another Logo	Upload Logo
<input type="radio"/> Do Not Use a Logo	

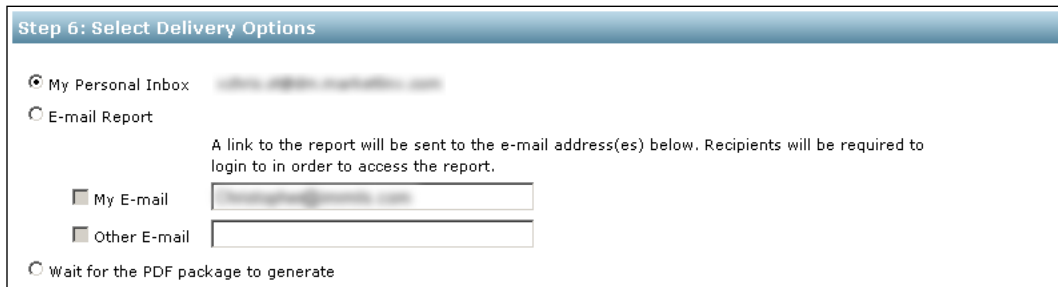
To upload a logo or photo, click **Upload**. To see a preview of a photo or logo, click **Preview**.

6. Enter Prepared For Information and Prepared By Information in the provided fields.

Step 5: Select Branding Options	
Prepared For Information	
Name:	<input type="text"/>
Company:	<input type="text"/>
Address:	<input type="text"/>
Phone:	<input type="text"/> Fax: <input type="text"/>
Prepared By Information	
Name:	<input type="text"/>
Company:	<input type="text"/>
Address:	<input type="text"/>
Phone:	<input type="text"/> Fax: <input type="text"/>

7. Select one of the following document delivery options:

- Select **My Personal Inbox** to send the document package to Smart Fax.
- Select **E-mail Report** to send a link to the Archive Report to the specified email address.
- Select **Wait for the PDF Package to generate** to display the Archive Report in your web browser.



Step 6: Select Delivery Options

My Personal Inbox

E-mail Report

A link to the report will be sent to the e-mail address(es) below. Recipients will be required to login to in order to access the report.

My E-mail

Other E-mail

Wait for the PDF package to generate

Note:

Emailed links to Archive Reports are only valid for 30 days.

8. When you're done selecting Archive Report options, click **Generate Report**.

Depending on the number and size of the documents and sections you selected, it may take some time to generate the Archive Report. Do not close the window until the process is complete.