

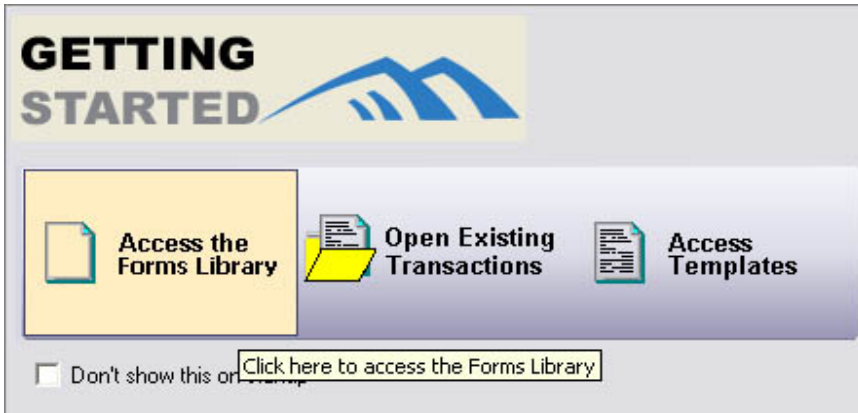
  
**TRUEFORMS**  
*Real Estate Forms Software*



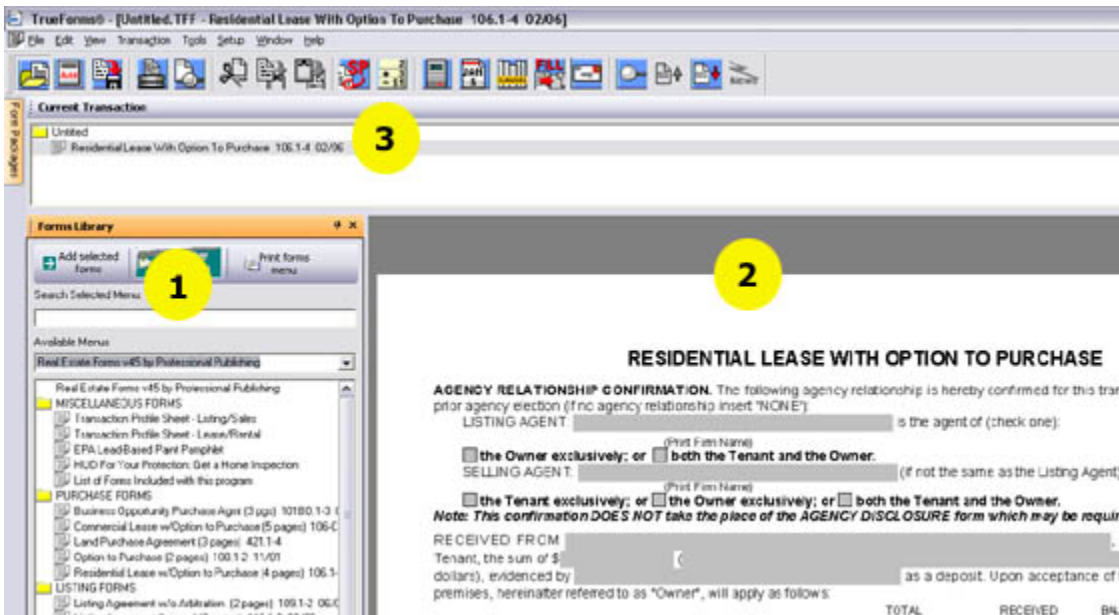
Sales: [sales@revealsystems.com](mailto:sales@revealsystems.com) (800-499-9612)  
Support: [techsupport@revealsystems.com](mailto:techsupport@revealsystems.com) (303-774-7150)

## Create Transactions

To Create a New Transaction select "Access the Forms Library" from the Getting Started screen.



This will take you to the main TrueForms screen where you can select Forms from the Forms Library to add to your Transaction. There are three main parts to the TrueForms workspace.



**1. Forms Library.** From here you can select individual forms from the library. To select a form just double click on the form name and the form will open in the main TrueForms workspace (hold down the CTRL key and click on each form for multiple selections). If you have multiple forms libraries installed click on the down arrow under available menus to select a different form library.

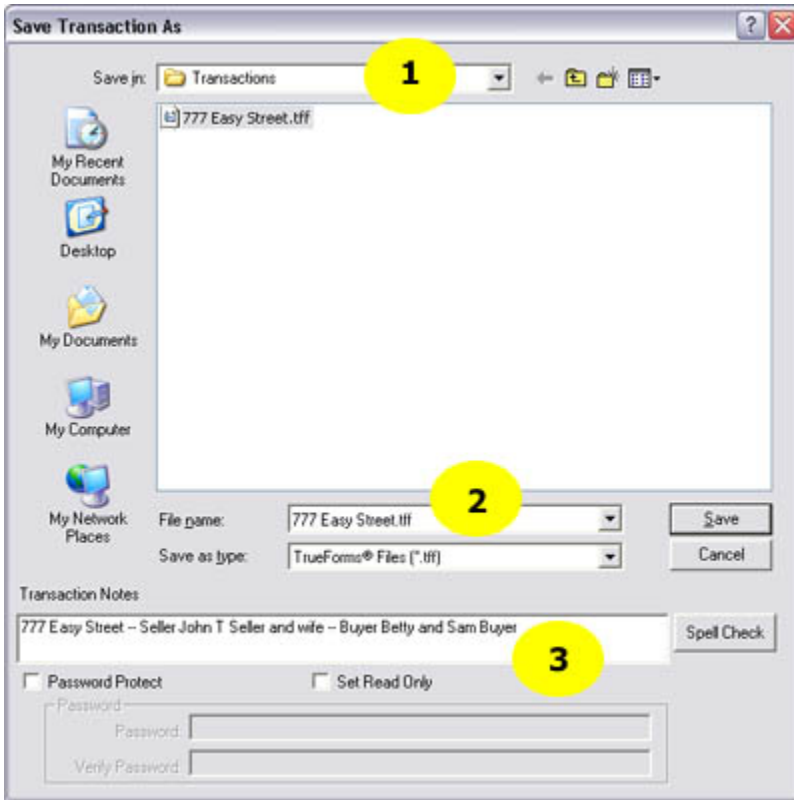
**2. TrueForms workspace.** This is where all form data entry is done, once you have selected your form(s) they will appear in the TrueForms workspace.

**3. Current Transaction Window.** The current transaction window allows you to keep track of which forms you have in the open transaction you can easily switch between forms by selecting the form from the Current transaction window.

# Saving Transactions

*TrueForms Desktop users only*

Once you have created a transaction you will need to save it. From the **File menu** select "**Save Transaction**" this will bring up the Save Transaction dialog as shown below.



1. Folder to save transaction in. By default TrueForms saves it's transactions to C:\TrueForms\Transactions for the TrueForms Admin user and to C:\TrueForms\Transactions\username if you were logged in as "username".

2. TrueForms Transaction file, you can name the transaction anything you want, however it is recommended that you chose a name that relates to the transaction file such as the property address, buyers name or sellers name. Transaction name cannot contain the following characters: , \ / : \* ? " < > | .

3. Transaction Notes, and attributes can be set on the transaction. For added security you can password protect or set a transaction to read only.

## TrueForms data entry

TrueForms version 4.5 takes a whole new approach to the entry of data and how data is populated between forms in a transaction. By identifying common fields in forms such as a sellers name, property address or brokers information the data can be entered once then the data will populate through out all forms in the transaction.

Data can be entered directly into the form(s) or can be entered into the global editor in either case the common data is transferred to all forms in the current transaction and stored in the global editor.

### Residential Sale and Purchase Contract

FLORIDA ASSOCIATION OF REALTORS®

1 **1. SALE AND PURCHASE:** Robert P. Jones and Doris S. Jones  
2 and Sam J. Adams and Sally R. Adams  
3 agree to sell and buy on the terms and conditions specified below the property described as:  
4 Address: \_\_\_\_\_  
5 \_\_\_\_\_ County: \_\_\_\_\_  
6 Legal Description: \_\_\_\_\_  
7 \_\_\_\_\_ Tax ID No: \_\_\_\_\_

To see which fields have been identified as common click on the View menu and select "View Global Edit". This will display the global data editor. Data entered into the global editor will be populated through all forms in the Transaction.

**GLOBAL EDIT**

Broker  
 Other Broker  
 Agent  
 Agent  
 Other Agent  
 Listing  
 Sales  
 Lease  
 Seller  
 Seller 1  
 Seller 2  
 Seller 3  
 Seller 4  
 Buyer  
 Buyer 1  
 Buyer 2  
 Buyer 3  
 Buyer 4  
 Property  
 HOA  
 Closing  
 Appraisal  
 Lending  
 Inspection  
 Deadline Dates / Times

**Broker**

Brokerage:  
 Brokerage:   
 MLS #:  
 MLS #:   
 Address:  
 Address:   
 City/State/Zip:  
 City/State/Zip:

Broker:  
 Broker:   
 Phone:  
 Phone:   
 Fax:  
 Fax:   
 Cell:  
 Cell:   
 EMail:  
 EMail:   
 Website:  
 Website:   
 License #:  
 License #:

OK Cancel

Each item in the left hand pane of the Global editor has several fields available for information. All information is then automatically transferred into the forms within the current transaction.

When you make a change to a global edit field that already contains data you are prompted to make the change globally to all forms in the transaction. If you select "Yes" all forms are updated to reflect the change. If you select "No" only the current field is changed in the current form.

**TrueForms®**

?

This Field may be present in other areas of this form and in other forms in this Transaction.

Do you want to update this Field globally?

To stop this message from popping up, go to Tools - Options - SpeedFill Options and select either the 'Always Update or Never Update' options

Yes No

## e-mailing from TrueForms Online version

### *TrueForms Online instructions*

When sending an email from TrueForms Online you do not need to have an email client application installed. The emails are sent from Reveal Systems Inc. mail servers.

Open the Transaction file you want to send. Then click on the Email icon or select Email Forms from the file menu. The email dialog will open like the one below

The screenshot shows the 'Email Setup' dialog box with the following fields and callouts:

- 1**: 'Enter Your Email Address (Ex. JohnDoe@myemail.com)' field containing 'JohnDoe@myemail.com'.
- 2**: 'Enter Recipients Email Address (Ex. JohnDoe@myemail.com)' field with 'Add', 'Remove', and 'Address Book' buttons.
- 3**: 'Enter Email Subject' field.
- 4**: 'Forms In Transaction' section with a radio button selected for 'Email Selected Forms (PDF Format)'.
- 5**: A list of forms including 'A/S-2K Standard Agreement for the Sale of Real Estate', 'Transaction Summary Sheet - Listing/Sales', 'RIUA Residential Use Addendum', 'LA Land Addendum to the Standard Agreement of Sale', 'RIUA Residential Use Addendum', and 'Standard Exclusive Listing Contract'.
- 6**: 'Enter the Email Message Body' text area.

Buttons at the bottom include 'Send Email' and 'Cancel'.

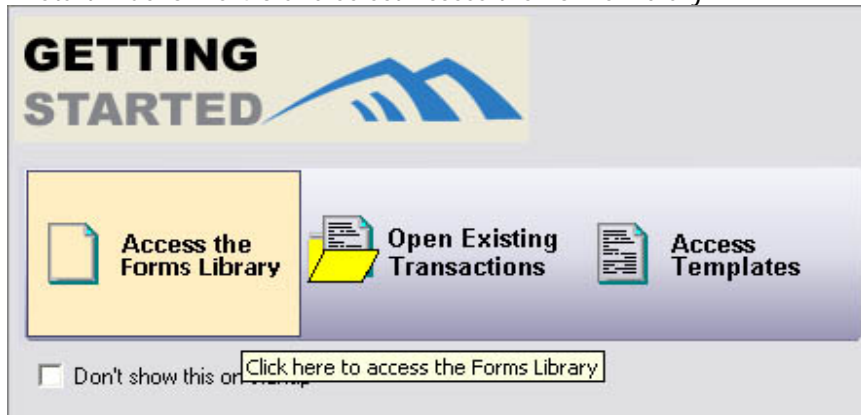
1. Enter your email address, this is the 'From' address field
2. Enter in the recipients email address, you can add multiple recipients one per line (separate each by semi-colon).
3. Enter in a subject for the email, note subject is not required, however **email with blank subjects are often flagged as spam.**
4. **Make sure that PDF Format is selected.**
5. Select the Forms from the list that you want to send. To Select multiple forms hold down the CTRL key on your key board and click on the forms you would like to send.
6. Enter a brief message to be included in the email body.

Click on Send Email, this will send all selected forms in PDF format to the recipients. Note if you select four forms then the recipients will receive one email with four PDF file attachments.

## Creating Templates

TrueForms version 4.5 templates are the fastest and easiest way to easy create a pre-filled forms transaction. To Create a Template follow the steps below:

1. Start TrueForms 4.5 and select Access the Forms Library



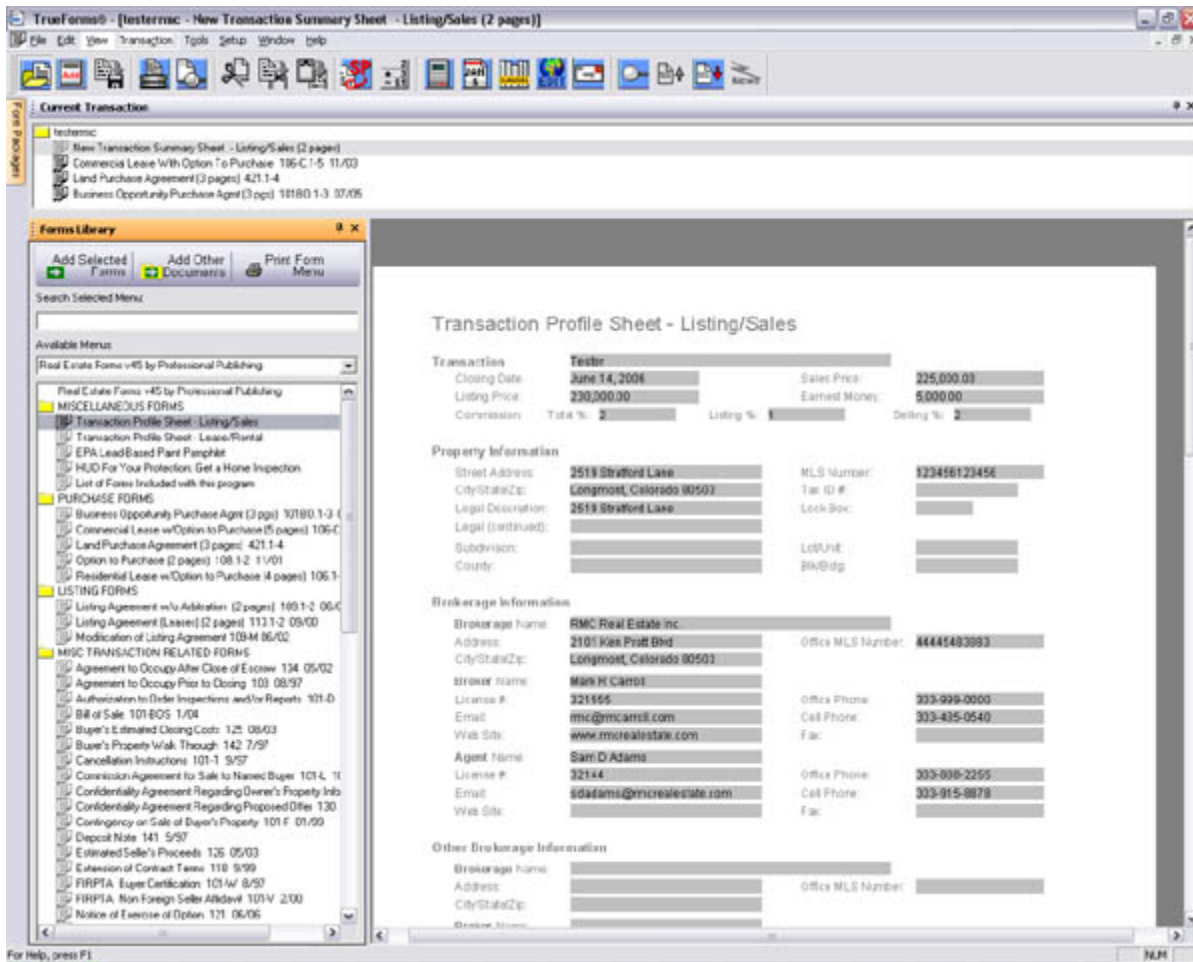
2. From the Forms Library add-in the Transaction Profile sheet; depending on the type of template you are creating you will want to select either the Transaction Profile Listing / Sales or Lease / Rental. This will be the base form for the Template.

3. Enter in the Brokerage Information and agent information:

### Brokerage Information

<b>Brokerage Name:</b>	The Brokerage Company		
Address:	2101 Main Street	Office MLS Number:	123456789
City/State/Zip:	Anytown, Anystate 010101		
<b>Broker Name:</b>	Sam T Adams		
License #:	987654321	Office Phone:	000-111-2222
Email:	brokeremail@yourdomain.com	Cell Phone:	000-333-4444
Web Site:	www.brokerwebsite.com	Fax:	000-222-3333
<b>Agent Name:</b>	Sally S Agent		
License #:	775555555	Office Phone:	000-222-5555
Email:	sallyagent@brokeremail.com	Cell Phone:	000-333-7777
Web Site:	www.thebrokersite.com	Fax:	000-222-6666

4. Click on the Forms library and add-in forms that are relevant to this template ( i.e. Purchase templates typically contain the purchase forms and related addenda).



5. From the file menu select "Save Transaction as Template". You will be prompted to name the template, give it a descriptive name such as "Master Purchase Template". When Templates are created by the TrueForms Admin user those templates are available to all users.



Start TrueForms 4.5 select "Access Templates" or from the File menu select "Create Transaction from Template" double click on the template, enter a name for the new Transaction and start filling in data.

