

Exporting Your Transactions from WEBForms®

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EXPORTING TRANSACTIONS FROM WEBFORMS®

There are many reasons for exporting a Transaction Kit, most commonly is for archival purposes. You would not export a Transaction Kit until such time the status of the Transaction is one of the finished statuses. Those statuses are:

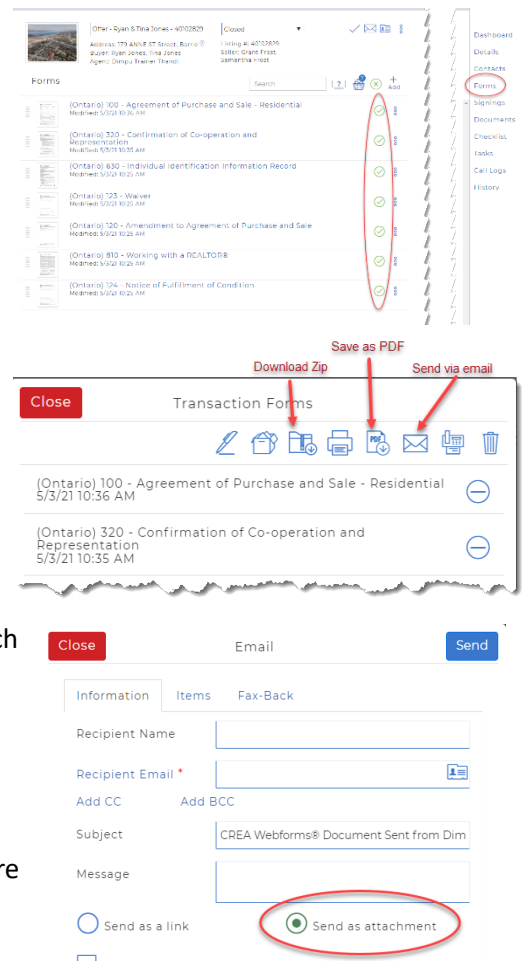
- Closed
- Closed File Complete
- Expired
- Withdrawn

The steps to export a Transaction Kit set of forms are as follows:

- Open the Transaction Kit.
- Select Forms from the right-side bar menu.
- Select All the forms.
- Click on the Basket.
- The popup shows all the selected forms, along with a menu bar along the top with options:
 - Download ZIP: this puts the forms all into a *compressed* file. This file is smaller and takes less space to save. The files cannot be modified at this point.
 - Save to PDF: this puts all the form into a single pdf file. The files cannot be modified at this point.
 - Send via Email: Select to send documents rather than a link. This will send the forms to an email; each form is a separate attachment to the email message. In this example, 7 pdf files. The files cannot be modified.

You can select either of the three options. If the purpose is for archiving on your computer or an office server, then the Zip or PDF are appropriate.

If you are transporting Transaction Kits to SkySlope, then email works perfectly.

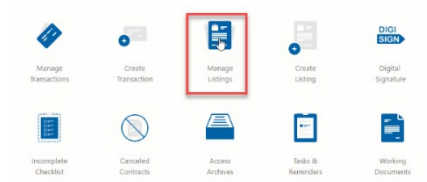


EMAILING TRANSACTIONS TO SKYSLOPE

Open the SkySlope file. Click on Manage Listings or Manage Transactions.

Click on the file you wish to open.

MLS#	Property Address	Status	Expiration Date	Listing Price
1790052	9488 Village Tree Ct, Elk Grove CA, 95758	Active	09/28/2017	\$ 389,999.00
123456	640 Laurel Dr, Sacramento CA, 95864	Active	09/28/2017	\$ 99,999.00
123456	6580 River Creek Rd, Sacramento CA, 95822	Active	09/19/2017	\$ 79,000.00



Once the file is open, in the upper-right corner there is an email address – copy that email address.

Return to WebForms® and use the Send via Email to send the forms from a transaction to the same transaction in SkySlope. Remember to send the transaction forms as attachment NOT as a link.

LISTING	CONTACTS	CHECKLIST	DOCUMENT	LOG	TASKS
ADDRESS 640 Laurel Dr, Sacramento CA, 95864	AGENT Aubrey F	YEAR BUILT 1993	EMAIL LaurelDr40@kyslope.com		