SKYSLOPE FORMS®

Step By Step Process Guide

Agent Handbook

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Sign Up for SkySlope Forms

Note: If you already have a SkySlope Account through your brokerage, please jump to the next section: Accessing SkySlope Forms.

1. Navigate to **https://skyslope.com/forms-login/**
2. To **create a SkySlope Forms account**, simply enter your full name, email address, and create a password > **Click Next.**
3. Select your **region** > Click **Next.**
4. Add your **associations** > Click **Next.**
5. Depending on your association, you may need to enter your License Number or Membership ID to **authenticate** and access your forms.
6. Click on your **name** in the upper right corner, and then select **User Profile**. Fill out your Personal, Professional, and Brokerage information. Then click **Save**.
7. Click on the **Files** tab in the upper left corner to return to the Forms Dashboard, where you can create a Forms file. **Create** your first Forms file, and then click **Add Forms** to access your form libraries.

Access SkySlope Forms via SkySlope Suite

Note: If you do not currently have a SkySlope Account through your brokerage, please refer to the previous section: Sign Up for SkySlope Forms.

1. Navigate to **app.skyslope.com** to log into your SkySlope account.
2. Once logged in, click on the **APPS icon** in the upper right corner > Select **Forms.**
3. You will be directed to the **Forms Dashboard.**

Set Up Your SkySlope Forms Account

1. If this is your first time accessing SkySlope Forms, you will first be prompted to **select your region(s)**. Click + Add Another Region to add more than one. Click **Next**.
2. Depending on your selected regions, you will see a list of available associations to add to your account. Click + Add to **select your associations**. Click **Next**.
    a. **Note**: You can always return to your User Profile later to add or remove associations.
3. Depending on your association, you may need to enter your License Number or Membership ID to **authenticate** and access your forms. Click **Next**.
4. Once complete, you will be directed to the **Forms Dashboard**.

Customize Your User Profile and Associations

User Profile

1. Click on your **name** in the upper-right corner > Select **User Profile.**
2. Complete your **personal information, professional information, and brokerage information.**
    a. **Note**: You can update your regions at any time by clicking the ⊖ icon to remove regions, or by clicking + Add Another Location to add new regions.

Associations

1. Click on your **name** in the upper-right corner > Select **Associations.**
2. To add an association, use the drop-down menu to **search for associations** > Click **Add.**
    a. Depending on your association, you may need to enter your License Number or Membership ID to **authenticate** and access your forms.
3. To remove an association, click the ⊖ Remove icon for the association from the list of Your Connected Associations.

Note: If you have been granted access to any **Broker Libraries**, they will also be shown under your list of associations.

Create a Forms File

1. From the SkySlope Forms Dashboard, click **+ Create New File.**
2. Select your **representation** (Seller, Buyer, Landlord, or Tenant).
3. Enter your primary **client's contact information**. If you have more than one client, click + Additional Contact.
4. Enter the **property address** into the address field, or click **Import MLS Data** to quickly import all available data from the MLS service.
    a. Note: If you don't have property details yet, you can **skip the address** section.
5. Finally, **name your Forms file**; select between the Address and Primary Client options, or manually type a custom name into the text field.
6. Click **Create.**

Create a File Faster with MLS Import

When creating a new SkySlope Forms file, using the MLS Import tool allows you to easily input more data about your file faster.

1. From the SkySlope Forms Dashboard, click **+ Create New File.**
2. Select your **representation**, and enter your **client's contact information.**
3. When prompted to enter the property address, click **Import MLS Data.**

Creating a File with MLS Import (cont.)

4. Enter the **MLS #** for the property to search, then **select your property** in the search results.
5. All available information from the MLS — such as the listing agent, list date, list price, etc. — will be **imported** into your Forms file. When you begin to add forms into your file, any data available will be auto-filled onto your forms.

Add Forms

1. From the SkySlope Forms dashboard, click on your file to **open** the file.
2. Click **+ Add Forms.**
3. Type the **form name** into the search bar to search.
4. In the list of search results, locate the form you want to add > Click **+ Add.**
   a. **Tip**: Click on the form name (rather than the + Add button) to preview the form before adding it.
   b. **Note**: Once added, the form will show ⊖ REMOVE; you can click Remove to unselect the document.
5. Once forms are added, a dark blue bar will show in the bottom-right corner; click **View** to show the list of your forms selected to be added to your file.
6. Continue to **search** for and **add** forms until you are done > Click **Next.**
7. Now, your selected forms have been **added to your file**, and auto-filled with any data available from your file details/MLS data import.

Filtering by Library

1. From the Add Forms page, locate the option to **Filter Results By: All Libraries** > Click **All Libraries** to open the drop-down menu.

Filtering by Library (cont.)

2. In the drop-down menu, you will see a list of all associations that are connected to your account. **Select the association** to filter your search results.
    a. For example, if you select the California Association of Realtors library, you will only see search results from that library (rather than from all libraries).
    b. **Note**: You can select more than one library to filter by.
3. Use the **search** bar, or **browse** through the list of available forms in that library to locate the forms you need using the library filter > Click **+ Add** to add the forms to your file.

Filling Forms

Selecting Forms to Create an Envelope

1. From the SkySlope Forms dashboard, click on your file to **open** the file.
2. On the Forms page, you will see the forms you've added to your file. **Select the forms** you want to include in the envelope you will be sending to your client to sign.
3. **Check** the bubble in the upper-left corner of the form preview to select a form. You can select as many forms as needed.
    a. **Note**: To quickly select and fill one form, just click on the preview of that form to skip right to the form fill page.
4. Once you've selected your form(s), click **Fill and Send.**

Filling Forms

In the main window of the **Form Filling page**, you will see a large **preview** of the forms you selected to include in this envelope. Scroll through the forms to **fill your forms** one page at a time. Any areas that can be filled are indicated by a blue field. All data is **automatically saved** as you go. Once you've finished filling out all of the forms in your envelope, you can click **Prepare Signature** to send the forms to your signer(s), or you can click **Save & Exit** to save this bundle of forms as a Draft Envelope.

Filling Forms (cont.)

Field Types

There are different types of fields you will encounter when filling your documents, such as: date pickers, single- and multi-line text fields, and contact fields. Different field types function in different ways. Here is a quick breakdown of the most common field types:

- **ADDRESS** - Property address fields are powered by Google Search, or can be manually entered.
- **DATE** - Allows you to select a date from a calendar tool.
- **NAME** (Buyer/Seller/Other Contact) - Allows you to manually enter the pertinent contact details for parties involved; once entered, these contacts are stored in the File Details and will be auto-filled across other forms.
- **CHECKBOX** - Checkboxes can either be checked or unchecked.
- **SINGLE-LINE TEXT** - In a single-line text field, you can type (or copy and paste) directly into the field until the character limit has been reached. Once the limit is reached, the text field will be outlined in red. The font size will change depending upon the amount of text that is entered to allow for the maximum amount of text to fit and remain legible.

Field Types (cont.)

- **MULTI-LINE TEXT** - When you click on a multi-line text field, a small text window will open. You can type (or copy and paste) text into this field, and a character counter will tell you how many characters you have left in that text field. When you've reached the character limit, you will still be allowed to continue typing; however, **only the characters within the limit will be added and visible on the form**. The text entered will automatically format into the lines of the form.

Filling Tools

On the form filling page, there are a few tools available to make filling your forms easier:

- **ORDER FORMS** - In the left column, you will see a list of the forms included in this envelope. Click the hamburger icon ≣ to drag the forms into the desired order. The order selected here is the order in which the forms will be signed.
- **ADD FORMS** - Forgot a form? Click on + Add Forms in the bottom-left corner to quickly select and add forms from your libraries, from your file, or upload from your device.
- **PAGE JUMP** - To the right of the list of forms, there is a page number drop-down menu that you can use to jump to a certain page of the form you are currently viewing.
- **DOWNLOAD** - Click the Download button to download the form(s) in your envelope as PDFs.

Filling Tools (cont.)

- **ZOOM** - Click the + or — icons to zoom the document view in or out.
- **IMPORT MLS DATA** - If you skipped the MLS Import option when creating this forms file, you can click the Import MLS Data button to search for the MLS Listing and import any available data, such as the listing agent, list date, list price, etc. This data will then be stored in your file, and auto-filled onto any forms added to the file.
- **SAVE & EXIT** - If you save and exit the envelope, your progress at that point will be saved as a Draft Envelope that you can later open, edit, and send.
- **SAVE AS A TEMPLATE** - Clicking Save as a Template allows you to create a new Forms Template with the forms and data present in the current envelope.
- **PREPARE SIGNATURE** - Once you have completely filled out your forms and are ready to send them to your client to sign, click Prepare Signature.

Creating Forms Templates

Creating a Template

1. From the Forms dashboard, click on the **Templates** tab > Click **Create Template.**
2. Select your **template type**; this will ensure only Seller Templates are available in a Seller File, and so on.
3. **Name** your template; ensure the name is easily identifiable to make it clear what's included in the template.

Adding Forms to a Template

1. **Add forms** to your template.
    a. Use the **search bar** to locate files by name, **OR** use the **library filter** to browse forms within a certain forms library.
    b. Once you've located your form(s), click **+ Add** to add that form to your template.
    c. **Continue** adding your forms until you've selected all forms you wish to include in this template.
2. To view which forms you've selected, click **View** in the dark blue toolbar in the lower-right.
3. If you have a PDF document you wish to add to your template that isn't available within your Forms libraries, click **Upload Document** in the lower left corner to upload a document from your computer.

Adding Forms to a Template (cont.)

   a. **Note**: The option to pre-fill text in a template is not available for uploaded PDFs. However, uploading a document you always send in a packet with your other forms prevents you from having to manually upload it into each file when you use this template.

4. When you're done adding forms, click **Continue** in the lower-right.

Filling Forms

For more detailed information about filling forms for your template, please review Filling Forms (Page 10).

1. Now is your opportunity to **pre-fill** any text within the form(s) that you will want to use each time you use this template.
   a. For example, if you always ask for a 28-day escrow period and always use the same title company on every purchase contract, you can pre-fill those terms in the form.
   b. **Note**: Any text that is added into the forms within a template will be pre-filled each time you add the template to a Forms file. Once added to the file, you will still have the opportunity to change or remove any of the pre-filled text, and add text to the fields that were left blank in the template.
2. When you're done editing your template, click **Create Template** in the lower-right.

Create a File Faster with Templates

1. Once you've created your template(s), they will be available to select when creating a Forms file. At the bottom of the Create File page (where you enter your client's names and the address), you will see "Would you like to start with one of your templates?" **Select the template** you want to add > Click **Create**.
    a. **Note**: The list of available templates will be filtered based on the representation type. For example, if you are creating a Seller file, you will only see Seller templates.
2. When you select a template while creating your file, your file will be created and the forms within that template will be added immediately. From there, you're ready to complete your forms.

Apply Forms Templates to a File

1. If you did not apply a template during the file creation process, you can apply the template to an already created file. From the **Forms tab** of your file, click **Apply Template** in the upper-right corner.
2. You will see a list of Personal Templates and Brokerage Templates (if enabled for your brokerage) available to be added to your file, based on the file type.
3. **Select** a template > Click **Apply.**
4. All of the forms from the template will be available in your file immediately.

Using Forms Templates

Template Actions

From the Templates tab of SkySlope Forms, there are different actions that can be taken on your templates.

1. From the SkySlope Forms dashboard, navigate to the **Templates** tab.
2. For each template, you will see an ellipses icon ⋮; click that icon to open the **Actions Menu**. From the actions menu, you can:
    a. **Edit** - Opens your template and takes you to the Edit Template page.
    b. **Add Forms** - Redirects you to the Add Forms page to select new forms to add.
    c. **Remove Forms** - Opens a pop-up window where you can select specific forms to remove.
    d. **Template Details** - Opens a pop-up window where you can change the template name.
    e. **Duplicate** - Allows you to create a duplicate of the selected template and give it a new name.
    f. **Template Type** - Allows you to change your Template Type.
    g. **Delete** - Allows you to delete the selected template.

Template Actions (cont.)

3. To **preview** the forms included in any template, click on the eye icon that shows the number of forms; a pop-up window will open to show you a list of the forms in that template.

Brokerage Templates

There are two types of templates available in your account: Personal Templates and Brokerage Templates. **Personal Templates** are the templates that you've created for yourself; only you have access to those templates. **Brokerage Templates** are created by the admins at your brokerage and shared with their agents. You have the ability to use, edit, and delete your own Personal Templates. You can use Brokerage Templates just like you can use Personal Templates, but you don't have the ability to edit or delete Brokerage Templates.

Preparing and Sending Envelopes with DigiSign

1. From the SkySlope Forms dashboard, click on your file to **open** the file.
2. On the Forms page, you will see the forms you've added to your file. **Select the forms** you want to include in the envelope you will be sending to your client to sign and then click **Fill & Send**. You can review Selecting Forms (Page 10) for more detailed instructions.
3. Now it's time to **fill your forms**, if you haven't already done so. You can review Filling Forms (Page 10) for more detailed instructions. If you need to **change the order** of the forms, use the left column to drag them into the correct order.
4. Once you have fully completed your forms and they are ready to be sent for signature, click **Prepare Signature**.
5. Next, **name your envelope** and **set your signer actions:**
    a. Manually name your envelope so that it can be easily identified.
    b. For each contact in your file, select their action as Needs to Sign, Receives a Copy, or No Action.
6. Click **Next.**
7. Now you will be redirected to the DigiSign document tagging page, you will **prepare the signatures, initials, and dates**.

Preparing and Sending Envelopes (cont.)

  a. **Forms Library Documents** - Documents that were added from your forms library by clicking + Add Forms will have all signature, initial, date, and text boxes pre-populated. Review these documents to ensure everything is in order.
  b. **Uploaded Documents** - Documents that were manually uploaded and added to the envelope require further action. If these documents require signatures, initials, dates, etc., those will need to be added manually. Please see instructions for Adding Blocks (Page 22).
  c. **Changing Signing Order** - To change the signing order, locate the Recipients section in the left column. Click the ⋮ icon, and then click Edit Recipients. Click + Add a Signer Group to populate the “Who Signs Second” section. Then use drag and drop to select the signer who will sign second and drag them into the dashed area under “Who Signs Second”. This process can be repeated to create as many groups as there are signers.

8. Once all necessary signature, initial, and date blocks have been added, click **Send**.
9. Manually enter an **Email Subject Line** and **Email Message** for your signer to review, and then click **Send for Signature**.

Adding Blocks

Note: Documents that were **added from your forms library** by clicking + Add Forms will have all signature, initial, date, and text boxes pre-populated. Review these documents to ensure everything is in order. Documents that were **manually uploaded** and added to the envelope require further action; if these documents require signatures, initials, dates, etc., those will need to be added manually.

1. Use the toolbar across the top of the page to **select the block type**; click on the desired block type to select it. For example, if you need to place a signature, click on Signature in the toolbar. Please review Block Types (Page 23) for more detailed information about available block types.
2. Click onto the form to **place the block**, using one of these two methods:
    a. **Default Size** - Single-click on the form where you want to place the block to add a block in a pre-set default size.
    b. **Custom Size** - Click, hold, drag, and release to create a custom sized block.
3. When sending to more than one signer, use the signer drop-down in the upper left corner to **change between signers**.
    a. Click onto the document to place the block for Signer A.
    b. Click onto the document to pace the block for Signer B; it will still show Signer A.

Adding Blocks (cont.

   c. After you've placed the second block, click on the block to select it. Then use the Signer drop-down menu in the upper-left corner to change it from Signer A to Signer B. This will give you one block each for Signer A and Signer B.

4. Once a block is added, single-click on the block to select it. Once selected, you will be able to see the **settings** for that block in the left column.
5. **Continue adding blocks** to all of your forms until you've reached the end of the envelope.

Block Types

- **SIGNATURE** - Allows the signer to click and add a signature to the document.
- **INITIALS** - Allows the signer to click and add a set of initials to the document.
- **FULL NAME** - Auto-fills the signer's full name onto the document.
- **DATE** - Auto-fills the current date that the document is signed.
- **TIME** - Auto-fills the current time that the document is signed.
- **CHECKBOX** - Allows the sender/signer to select or deselect checkmarks on the document (based on checkbox settings).
- **TEXT FIELD** - Allows the sender/signer to enter text into a field (based on the text field settings).
- **STRIKE** - Allows the sender to add a horizontal line on the document to strike-through text (when permitted by the forms provider).

Managing Envelopes

Accessing Envelopes

From the SkySlope Forms dashboard, you will see a column representing how many envelopes each file has. You can click on the number of envelopes to jump directly to the Envelopes tab of that file.

Envelope Statuses

To check an envelope's status: **Open** your Forms file > Navigate to the **Envelopes tab** > Refer to the **Status column**.

- **DRAFT** - Envelopes that have been started and saved before being sent.
- **SENT** - Envelopes that have been sent, but have not yet been signed by any signers.
- **IN PROGRESS** - Envelopes that have been sent, but have not yet been signed by all signers.
- **CANCELED** - Envelopes that have been sent, and then canceled, before they were signed by all signers.
- **COMPLETED** - Envelopes that have been sent, and signed by all signers.

Managing Envelopes (cont.)

Envelope Actions

To access the Actions Menu for any envelope, click on the **Actions Menu** icon ⋮ on the right. The available actions will vary depending on the envelope's status.

Send a Reminder

To send a reminder to any signer:

Open your Forms file > Navigate to the **Envelopes tab** > Click on the **Actions Menu** ⋮ > Click **Send Reminder.**

To send an invitation to a different email address:

Open your Forms file > Navigate to the **Envelopes tab** > Click on the **Actions Menu** ⋮ > Click the **Pencil** > Enter **new email address** > Click **Send Reminder.**

Creating SkySlope Files with Forms Data

If your brokerage uses SkySlope to manage Listings and Transactions in addition to using SkySlope Forms, you can easily use the work you've done in Forms to create your Listing and Transaction files even faster.

Creating a Listing File

1. From the SkySlope home page, click on **Create Listing**.
2. In the Address Search window, you will see the option to select from **Recently Created Forms Files. Select a Forms file** to pull data into SkySlope from the Forms file.
3. Click **Next** to proceed to the next page.

Create a Transaction File

1. From the SkySlope home page, click on Create Transaction.
2. In the Address Search window, you will see the option to select from **Recently Created Forms Files. Select a Forms file** to pull data into SkySlope from the Forms file.
3. Continue entering the **required** * **transaction information** on the Transaction tab, and click **Next** to continue.

Creating SkySlope Files with Forms Data (cont.)

When you create a SkySlope Listing or Transaction file from a SkySlope Forms file, you get the benefit of several **time-savers**:

- **All property and client data** from SkySlope Forms will be imported into SkySlope, saving you time on duplicated data entry.
- **All Completed envelopes** from SkySlope Forms will be automatically copied into your SkySlope file. For example, once your Listing Agreement is signed in Forms, it's automatically uploaded into your Listing file under the Documents tab, and is ready to be attached to the Checklist.

SkySlope Forms Tips & Tricks

Our Customer Support and Customer Success teams have curated a collection of tips and tricks that will help you get the most out of SkySlope Forms!

User Profile

One of the biggest time-savers is to **ensure your Personal, Professional, and Brokerage information is entered into your User Profile**.

- To enter this information, click on your name in the upper-right corner, and then select User Profile. On the Profile tab, complete the Personal, Professional, and Brokerage Information sections. Once completed, you will automatically be added into each Forms file you create as the Agent (Me) contact, and all applicable information will be populated onto the added forms accordingly.
- **Note**: This information will not be updated in your files retroactively. If you make changes to your User Profile, those changes will only be seen in files created after the changes were made.

File Details

Similar to the User Profile, **filling out the File Details section** of each Forms file will ensure as much data as possible is auto-filled after your forms are selected.

Forms Tips & Tricks (cont.)

Select Multiple Forms

Use the Shift key on your keyboard to **quickly select multiple forms** to add to an envelope.

- **To select all forms**: Check the bubble to select the first form > Press and hold the Shift key on your keyboard > Check the bubble of the last form you want to include (while still holding Shift) and all of the forms between the first and the last will be selected.
- **To select several forms**: If you need to remove a few forms in the selected group, simply uncheck those bubbles after you've followed the steps above to select the group.

Receive a Copy

Save time by using the Receive a Copy feature to automatically **send copies of signed envelopes to a selected recipient**.

- For example: If you are sending your buyers a contract to sign, and you want the seller's agent to receive a copy of the signed contract automatically, add the seller's agent to the envelope as "Receives a Copy". A copy of the signed document will automatically be emailed to the seller's agent as soon as both buyers have signed, and the envelope is in Completed status.

Forms Tips & Tricks (cont.)

Copy + Paste

After you've filled out your forms and clicked Prepare Signature, you will arrive on the document tagging page in DigiSign. To **cut your block placing time in half**, simply place the blocks for Signer A, and then use the Copy and Paste options to duplicate them for Signer B.

- For example: Place the signature, date, and initial blocks for Signer A on page 1 > Use your mouse to click, hold, and drag to select all blocks for Signer A > Once selected, click Copy (or CTRL + C) > Click Paste (or CTRL + V) > All selected blocks will be duplicated. While still selected, change the duplicated blocks from Signer A to Signer B.

Checkbox Groups

Checkbox Groups allow the sender to group together a cluster of checkboxes, and **set a requirement for that group**.

- For example: If a signer is asked a question and needs to select "Yes" or "No", select Checkbox on the toolbar and click to place one checkbox > Click the + icon to add a second checkbox to the group > Drag the second checkbox to the correct location > In the left column, use the drop-down menu to select the settings for that group.

Forms Tips & Tricks (cont.)

Checkbox Groups (cont.)

In this example, if you want the signer to select "Yes" or "No" (and not skip the question, or accidentally select both), you will choose "Select exactly" and "1"; this means the signer will not be able to complete signing without checking exactly one box in that group.

Rename Draft Envelopes

Creating Draft Envelopes ahead of time is a great way to **anticipate your client's needs**. However, having several draft envelopes within a file can become confusing.

- After you've created your draft envelope, click on the ⋮ icon on the Envelopes tab and select Rename Envelope. Then be sure to give that envelope a specific name ("Offer for $467,000" or "Listing Disclosures").

Archive a Forms File

To keep your Forms dashboard **up-to-date and organized**, archive any Forms files you're not actively working on.

- From the Forms dashboard, click on the ⋮ icon and select Archive. This will move the file into the Archives tab.

Forms Tips & Tricks (cont.)

Duplicate a Forms File

To quickly duplicate a file and its contents, click on the ⋮ icon on the Forms dashboard, and select Duplicate.

- For example: You are working with two buyers, and their offer was rejected. If you need all of the same forms for those clients, but for a different property, you can simply duplicate the file and change the address on the new file. When you change the address in the duplicated file, the property address will be changed on all of the forms as well.

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