

Documents



What are Documents?

Documents offers unlimited online storage of documents related to your transactions. It comes complimentary with WEBForms®/Authentisign®.

What is considered to be a “document”? In WEBForms®/Authentisign® there’s a difference between a document and a form. Forms are legal contracts provided by OREA, TRREB, your Brokerage, etc., that are filled out and are intended to ensure compliance with rules and policies, and to legally protect the participating parties. Documents are everything other than forms.

Documents typically include information that you collect regarding the transaction from your client or another party such as a home inspector. They are not interactive and are usually created outside of WEBForms®/Authentisign®. Images of the property, scanned contracts, scanned receipts of deposit checks, financial calculations, letters from lawyers, home inspection reports, etc., can all be considered to be documents.

File types

The following file formats will be accepted by Documents for storage:

- .PDF
- .DOC
- .DOCX
- .XLS
- .XLSX
- .JPG
- .GIF

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- .BMP
- .TIF
- .PNG

Uploading files

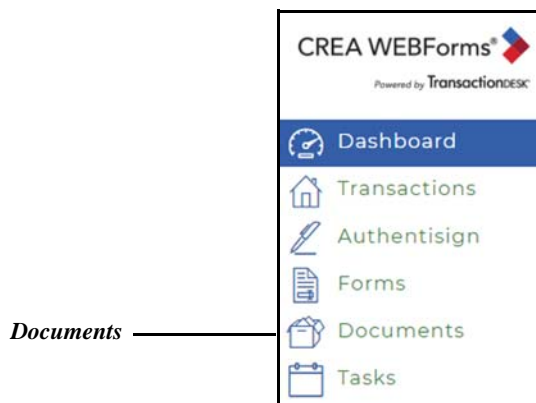
To upload a file into Documents:

1. Log in to Stratus and from the home page, click **WEBForms®/Authentisign®**. The Member Dashboard appears.

OR

If you are already logged in to WEBForms®/Authentisign®, click the **Dashboard** icon on the left-hand panel.

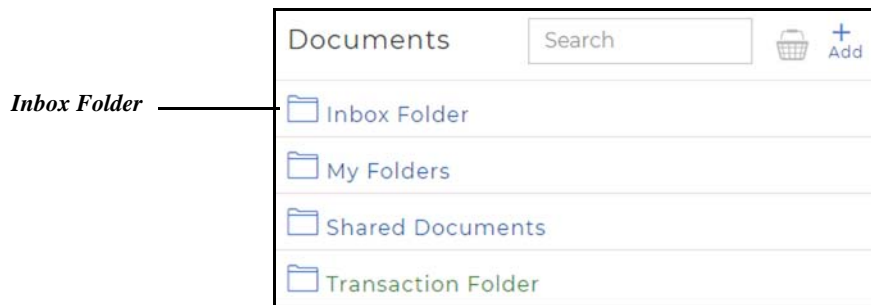
2. In the left-hand panel, click **Documents**. The Documents page appears.



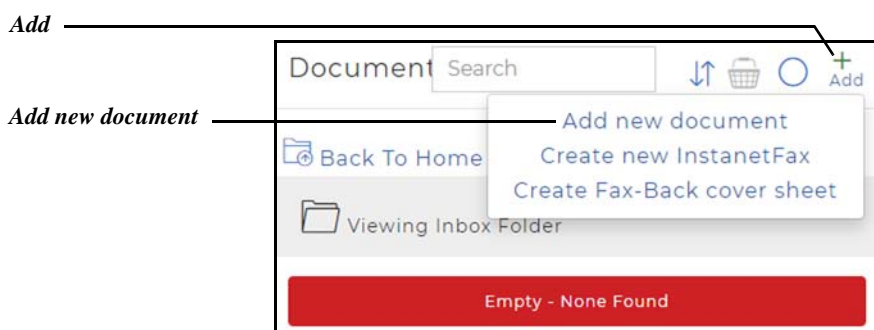
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3. Click the **Inbox Folder**. Until you create a custom folder, the Inbox Folder is the only folder that you can use to upload documents without using a Transaction.

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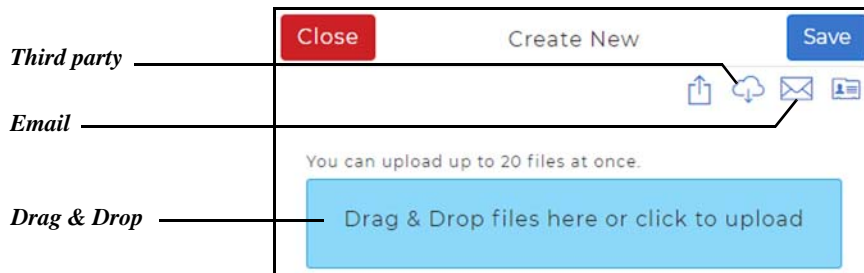
4. Click **Add**, then select **Add new document**.



5. The Create New dialogue box allows you to upload documents in several ways: Drag & Drop (or click to upload), upload from third-parties (DropBox™, Google Drive, One Drive, or Box™), or email upload. In this example, we'll use the first method. Click **Drag & Drop files here or click to upload**. The file management system of your computer or device appears.

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6. Navigate to where the files to be uploaded are stored on your device, select them, and click **Open**. The files upload into Documents and the dialogue boxes close.



NOTE: Once a file has been uploaded into the Inbox Folder, it can be moved to My Folders or to a custom folder.

You have successfully learned how to upload files into Documents.

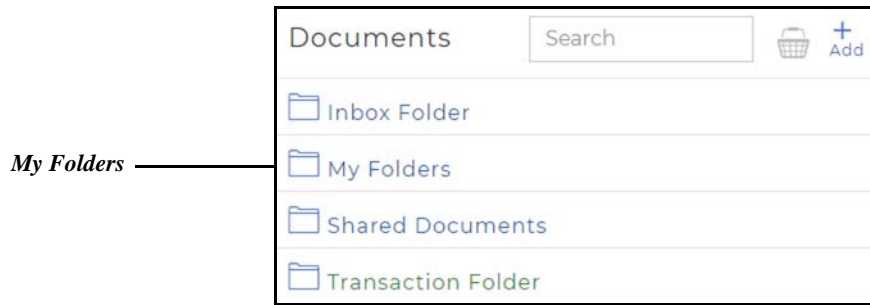
Creating custom folders

You can create custom folders in Documents to hold documents of a certain type, for a specific purpose, or transaction. Custom folders can only be created within My Folders.

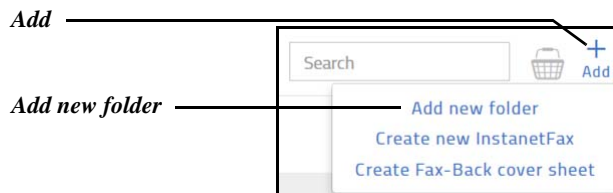
To create a custom folder:

1. Click **Documents** within WEBForms®/Authentisign®, if necessary.
2. Click **My Folders**. The folder opens.

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3. Click **Add**. A menu appears.
4. In the menu, click **Add new folder**. The Create New dialogue box appears.



5. Type a name for the folder, then click **Save**. The new, custom folder is added as a sub-folder within My Folders.

Adding files to a custom folder

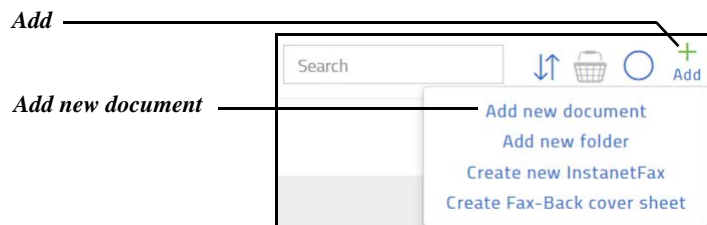
To add files to a custom folder:

1. Click **Documents** within WEBForms®/Authentisign®, if necessary.
2. Click **My Folders**. The folder opens.
3. Click the custom folder to which you want to add files. The folder opens.

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4. Click **Add**. A menu appears.
5. In the menu, click **Add new document**. The Create New dialogue box appears.



6. In the dialogue box, select the method to upload the file(s) of interest. You may click & drag/use the file navigator, import from a cloud storage device, or email into the folder.

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