

WMLS Orientation



**Instructors: Colby Roberts
Suzanne Dana
Jennifer Mitchell**



**Educate, Inspire
&
Inform**

WMLS Orientation Syllabus

I. Welcome

- A. Welcome Statement
- B. Quarterly Billing Schedule
- C. Service Area & Lockbox Requirements

II. WMLS Rules and Regulations

A. Overview

- Top 5 Most Violated
- Hot Topics
- WMLS Fine Chart

B. Forms

- Form 124 – Coming Soon
- Form 125 – Active w/ Contingencies
- Form 128 – Addendum to Non-VR Listing Agreement

C. Help

III. WMLS Ancillary Products & Mobile Apps

A. Clareity Dashboard

- Homes Pro
- RPR – REALTOR® Property Resource

B. Matrix

- Home Page
- Settings
- Input

C. Transaction Desk

D. Help



Welcome WMLS Subscribers & Participants,

Chartered in 1956, Williamsburg REALTORS® has been a mainstay in Virginia's Real Estate Industry for over 65 years. The technological advances of the last 20 years have required real-time change for the real estate industry and the Williamsburg REALTORS® have continuously stepped up to meet these demands.

The WMLS Board of Directors is focused on providing quality products and services to all members. They have centered the Rules and Regulations around accuracy of the database, professionalism and timely information to help you better serve your clients. This has provided a way to ensure transparency to the consumer while creating an equal 'playing field' for all firms, big or small. Though technology and the internet have created an advantage for all members of the WMLS, it also requires rules, due to the instantaneous nature of information being shared to public forums and IDX feeds.

Current lawsuits, public forums and a highly competitive marketplace demand a broker/agent to be better informed than the consumer. The Williamsburg Multiple Listing Service's goal is to ensure you have the proper tools that you need, in order to succeed! Welcome and good luck!

Sincerely,
WMLS Staff

2024 WMLS Quarterly Billing Schedule

Invoice Date	Due Date
January 3 rd	January 31 st
April 1 st	April 30 th
July 1 st	July 31 st
October 1 st	October 31 st

Note: WMLS Quarterly fees are invoiced to all Participants and Subscribers on the 1st business day of the month prior to a billing quarter (Jan., Apr., July, Oct.) and are **due in full no later than the last business day of the billing months**. There shall be a five (5) business day grace period after the due date before unpaid accounts are **inactivated and a \$100 reinstatement fee is required to reactivate WMLS Services**.

WMLS Service Area

Note: * denotes mandatory WMLS Lockbox Service Area

CITY OF WILLIAMSBURG *

JAMES CITY COUNTY *

YORK COUNTY *

YORKTOWN *

CITY OF POQUOSON

GLOUCESTER COUNTY

CITY OF NEWPORT NEWS

CITY OF HAMPTON

SURRY COUNTY

NEW KENT COUNTY *

TOWN OF WEST POINT

CHARLES CITY *

WMLS Rules & Regulations (R&R) Overview

THE MLS IS A MEANS BY WHICH PARTICIPANTS MAKE BLANKET, UNILATERAL OFFERS OF COMPENSATION TO OTHER PARTICIPANTS. THE “RULES AND REGULATIONS” ARE IN PLACE TO ENSURE AN EVEN PLAYING FIELD FOR ALL SUBSCRIBERS AND TO HELP MAINTAIN DATA INTEGRITY.

Top 5 R&R **Immediate Fine** Violations

1. Listing changed to “Active/Contingent” status **without meeting requirements of and/or completing Form 125**
2. Listing not updated to “Sold” status within **7 business days**
3. Listing not entered into WMLS w/in **3 business days** of Listing Agreement’s “Commencement/List Date”
4. Listing not marked “Pending” within **3 business days**
5. Re-entry of a released listing by same company and agent with-in 30 days of release

Please note that in most cases, response/action requirements are for **business days** not calendar days.

WMLS Hot Topics

WMLS Policy RULES & REGULATIONS:

- **Section 13: Password Confidentiality** - Authorized WMLS Users should not, under any circumstances, share their password and WMLS access with anyone. (\$300 fine & system force password)
- **Section 1.2c: CO-LIST** - “Co-Listing” within the same WMLS firm is permitted, however **both co-listing agents must be authorized users of the WMLS** and indicated as co-listing agents on the Listing Agreement and WMLS database. Co-Brokerage listings are also permitted in the WMLS system provided that both firms and co-listing agents are WMLS authorized users and are indicated as co-listing agents on the listing agreement and WMLS database
- Use of WMLS products and services are available ONLY to authorized WMLS Subscribers affiliated with the WMLS Participant (i.e: **Name, Reference to, Contact info of those who are not subscribers to the WMLS in ‘Agent Comments’ or ‘Public Remarks’**. **References to Co-Listing Agents who are not subscribers of the WMLS is strictly prohibited**) (Subject to \$100 unauthorized use fine and/or \$500 Subscription Waiver Violation that is invoiced to Broker)
- **Section 1.2.1: Listing Audits** – In order to ensure database accuracy, The WMLS randomly selects listings and may submit a request, to the listing office *and* the listing agent via email for copies of all or portions of the listing contract(s), and/or any other information/paperwork needed to verify accuracy and assure compliance with the WMLS Rules and Regulations. **The listing office or listing agent shall submit the information/paperwork to the WMLS within two (2) business days of notification.** (Failure to comply can result in \$100 fine and risk of the listing being deleted from the WMLS per Section 7.1d.)

WMLS Hot Topics

WMLS INPUT RULES & REGULATIONS:

- **Section 1:** Listings of Real property located with the WMLS Service Area (see pg. 4) **MUST be entered into the WMLS Database w/in three (3) business days** after a listing agreement has been ratified. (“Commencement Date”, or the date the listing was ratified, whichever date is later is considered to be the “List Date”)
- **Section 1.01: Clear Cooperation** - Within **one (1) business day** of marketing a property to the public, the listing broker must submit the listing to the WMLS for cooperation with other WMLS participants.
NOTE: Public marketing includes, but is not limited to, flyers displayed in windows, yard signs, digital marketing on public facing websites, 3 brokerage website displays (including IDX and VOW), digital communications marketing (email blasts), multi-brokerage listing sharing networks, and applications available to the general public.
- **Section 1.c: Acceptable Contracts** - The WMLS shall accept Exclusive Right to Sell listing contracts and Exclusive Agency Listing contracts, and may accept other forms of contract which make it possible for the listing broker to offer compensation to the other Participants of the WMLS acting as subagents, buyer agents, or both, or in a non-agency capacity as defined by law.
NOTE: Should any non-VR Listing Agreement (“Exclusive Authorization to Sell”) be used, the Listing Firm shall be required to use the “**Non-VR Listing Agreement Addendum**”, **WMLS Form 128**, signed by the Seller and the Listing Agent. Bank owned properties are exempt from using this form.
- **Section 1.2e: Lockboxes** – Listings located in the Mandatory WMLS Lockbox Service Areas (see areas in **bold** and marked * on pg. 4) are required to have a WMLS SentiLock lockbox on the property, if the Seller authorizes ANY type of lockbox. If no lockbox is authorized, a signed statement must be kept on file and “Showing Instructions” must be entered to indicate no lockbox per Seller.

NOTE: Residential rental listings, land listings, and commercial listings for sale or lease are exempt from this requirement.

- **Section 1.2c: Photo and/or Sketch Requirements** - A minimum of one (1) photo, scanned drawing, sketch or plat is required for ALL property types and must be uploaded within **three (3) business days** from the date of the listing.
- **Section 1.2f: Photos, Virtual Tours & Videos** – All photos, virtual tours and videos that are uploaded to the WMLS must be unbranded. (Subject to immediate \$100 fine)
- **Section 1.2h: DISCLOSURE/DISCLAIMER REQUIREMENTS** - The following signed disclosure forms which are mandated by the state or federal government are required to be uploaded, when applicable, to the listing at the time the listing is input and must be placed in the allocated document section of the WMLS Database. **NOTE:** Uploading these mandated documents to *any other section* of the WMLS Database does not satisfy this requirement.
 - 1. Residential Property Disclosure Statement; 2. Virginia Real Estate Board -AICUZ (noise and crash) for properties in or adjacent to a military air installation; 3. Virginia Real Estate Board- Septic; 4. Disclosure of Information of Lead-Based Paint and/or Lead Paint Hazards 5. Disclosure of Defective Drywall; 6. Disclosure of Property Previously Used to Manufacture Methamphetamine.
- **Section 1.15: Public Remarks and Directions** - Public Remarks shall ONLY include information referring to the specific listing. Any/All showing instructions, all statements that may present a public safety or vandalism concern (i.e. “vacant”), any statements that may present a potential violation of fair housing laws, or statements that can be construed as advertising shall NOT be identified in the “Public Remarks” or “Directions” sections of the listing data. Public remarks also shall not include any of the following contact information:
 - Call/Contact Listing Agent or Firm or any variation of this intent (Cannot direct the public to the listing agent or firm in public remarks, this belongs in Agent Remarks ONLY)
 - Listing Agent(s) Telephone Number(s)
 - Listing Agent(s) Email and/or Website Addresses
 - Listing Company’s Telephone Number(s)

- Listing Company's Name
- Listing Company's Email and/or Website Addresses
- Builder's Contact Information – Site Name, Address, Site Agent Contact Information, Site Telephone Number(s), Email and/or Website Addresses
- Reference to Projects, Contracts, Properties Building Deals
- Reference to Sales Center, Site, or decorated model
- Reference to Branded Virtual Tours
- Reference to Specific Lending Companies or Settlement Services
- QR Codes

NOTE: *Agent only comments appearing in any portion of the listing data, other than the "Agent Only Comments" section (i.e. "Directions", Supplement, Open House, etc.), shall have a fine and/or sanction imposed. (Subject to an immediate \$100 fine)*

- **Section 2.1: Showing Availability** - All listings that are entered into the WMLS **must be equally and immediately available** for appointments to all WMLS Participants and Authorized Users as of the List Date, with the exception of listings entered with the "Coming Soon" status. **NOTE:** Showing instructions such as "Do Not Show Until (future date)" or "Not available for (specific dates)" are not permitted in Agent Comments or Public Remarks. (Subject to an immediate \$100 fine)
- **Section 1.4: Change in Listings** - Any change in listed price or other change in the original listing contract shall be made only when authorized in writing by the seller and shall be entered into the WMLS computer system **within three (3) business days** after the authorized change is received by the listing broker.
- **Section 1.6: Listing Status Change** - Upon ratification of a contract, Listing Status shall be changed to PENDING and listings must be updated in the WMLS computer system as such within three (3) business days of contract ratification. (Subject to an immediate \$100 fine)
NOTE: CONTINGENCY EXCEPTION - *The owner and agent must complete and sign WMLS Form 125 and satisfy all conditions detailed on said form **within one (1) business day** of contract ratification for the listing to remain active in the WMLS system. Upon removal of all contingencies, listings must be changed to PENDING status **within three (3) business days**. (Subject to \$100 fine)*

-
- **Section 1.4.1: Reporting Sales** - When the status of a listing changes to “Sold” (or “Leased”) the status change and sold information shall be entered into the WMLS computer system within **seven (7) business days** after closing. (Subject to an immediate \$100 fine)
 - **Section 1.5a: Temporarily Withdrawn Listings** - The "temporary withdrawn" status is not to be used for a "released" or "cancelled" listing. Temporarily withdrawn listings are those that are temporarily not available to be shown. If the listing is in fact, "temporarily withdrawn" (for roof repairs, as an example), signed documentation from your Seller is required and the listing shall not be in the “temporary withdrawn” status for more than 30 days, unless Seller’s written authorization to do so is provided to the WMLS upon request. In addition, while in the “temporary withdrawn” status, “Agent Only comments” shall be used to indicate the reason for the temporary withdraw and the date the listing will again be made available to show (status changed back to “active”).
 - **Section 1.5: Release (Withdrawal/Cancellation) of Listings Prior to Expiration** - A listing of property may be released from WMLS by the listing broker before the expiration date of the listing contract, provided the release is entered into the WMLS computer system **within three (3) business days**. A copy of the agreement between the Seller and the Listing Broker which authorizes the withdrawal (cancellation) shall be on file with the listing office. Sellers do not have the unilateral right to require the WMLS to release a listing without the Listing Broker’s concurrence.
 - **Section 1.5b: Re- entry of Released Listings** - A listing released prior to expiration cannot be re-entered as “new” within 30 days of the date released by the same agent/firm.
NOTE: Re-entry of released listings under new ownership are permitted.
(Subject to fines)



RULES & REGS

VIOLATIONS

WMLS Rule	Fine Amt	2 Day Grace Period (Y=Yes)	Notes
Acceptable Contracts (Sec 1.2c)	\$100		
Accuracy of Listing Data (Sec 1.2.0)	\$100	Y	
Agent Only Comments (Sec 1.17)	\$100		
Change in Listings within 5 business days (Sec 1.4)	\$100		
Clear Cooperation (Sec 1.01)	\$500		
Co-List (Sec 1.2a)	\$100		
Coming Soon Listings (Sec 1.19)	\$500		
Contingency Exception Conditions Not Met (Sec 1.6)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
Detail On Listings Filed With the WMLS (Sec 1.2)	\$100		
Directions (Sec 1.16c)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
Disclosure/Disclaimer Requirements (Sec 1.2f)	\$100	Y	
Disseminating Office Exclusive Listings in any electronic format provided by the WMLS (Sec 1.3)	\$100		
Exclusive Agency Listing (Sec 1b)	\$100		
Failure to notify the WMLS in writing that a WMLS user who had been authorized is no longer affiliated with the company (Sec 6c & 6d)	\$100	Y	
Failure to pay any service charge or fee within one (1) month of the date due, and provided that at least ten (10) days notice has been given (Sec 7.1a)	\$50		WMLS Service suspended until reactivation fee of \$50 and outstanding charges are paid in full

WMLS Rule	Fine Amt	2 Day Grace Period (Y=Yes)	Notes
Intentionally reporting or falsifying listing data that compromises the integrity of the WMLS database (Sec 7.1g)	\$2,500		
Internet Data Exchange (IDX Sec 16)	\$1,000		Plus possible disconnection of IDX Feed
Listing Auction Properties (Sec 1.7a)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
Listing Price Specified (Sec 1.7)	\$100	Y	
Listing Procedures (Sec 1)	\$100		
Listing Status Change (Sec 1.6)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
Listings with Two (2) Property Types (Sec 1.18a)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
Lockboxes (Sec 1.2g)	\$100	Y	
Lockbox Service Rules (Addendum B, Sec 3.1 & 3.2)	\$50		Additional offenses = \$100 fine. Also see "SentriKey Sharing"
Membership Email Information (Sec 14.1)	\$1,000		
New Construction/Proposed Construction (Sec 1.18)	\$100		
Orientation (Sec 15)	\$100		Service suspended until requirement met
Owner's Name Required (Sec 1.2d)	\$100	Y	
Password Confidentiality (Sec 14)	\$300		Plus use of system forced password for 30 days
Photo and/or Sketch Requirements (Sec 1.2e)	\$100	Y	
Prohibited Listings (Sec 1.1)	\$100		
Public Remarks (Sec 1.16)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
QR Codes (Sec 1.16b)	\$100	Y	
Re-Entry of Released Listings (Sec 1.5b)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
Release (Withdrawal/Cancellation) of Listings Prior to Expiration (Sec 1.5)	\$100		
Reporting Cancellation of Pending Sale (Sec 2.7)	\$100		

WMLS Rule	Fine Amt	2 Day Grace Period (Y=Yes)	Notes
Reporting Pending Sales to WMLS (Sec 2.6)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
Reporting Sales to WMLS (Sec 1.4.1 & Sec 2.9)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
Requests for Listing Information Submitted to the WMLS (Sec 1.2.1)	\$100		If still in non-compliance after 2 days, subsequent fine is \$200, then if still not in compliance after 2 more days, listing is deleted
SentriKey Sharing (Addendum B)	\$1,000		Plus use of SentriKey suspended for 10 days. Second offense = \$2,500 fine and SentriKey use suspended for 20 days.
Showing Availability (Sec 2.1)	\$100	Y	
Teams (Sec 1.2b)	\$100		
Temporarily Withdrawn Listings (Sec 1.5a)	\$100	Y	
Unauthorized use of the WMLS, e.g. an unauthorized agent identified as the listing agent and/or contact agent (Sec 6d)	\$100		Plus Participant will be assessed applicable subscription fees
Violation of conditions set forth in Addendum A - "Application for Waiver of WMLS Subscription Fees" and certifications thereof (Sec 6c)	\$500		Plus Participant will be assessed applicable subscription fees
Virtual Office Website (Sec 17)	\$1,000		Plus possible disconnection of VOW Feed
Virtual Tours & Videos (Sec 1.16a)	\$100	Y	



FORM 124

**PRE-MARKETING ADDENDUM TO
EXCLUSIVE AUTHORIZATION TO SELL OR
STANDARD LISTING AGREEMENT**
(Use this Addendum only for property entered as "coming soon" in WMLS)



THIS PRE-MARKETING ADDENDUM is made on Today's Date 20__ to the Residential Listing Agreement dated FIELD A 20__ (the "Listing Agreement"), by and between _____ ("Owner") and _____ ("Broker") for the exclusive right to sell certain real property known as _____, Virginia (the "Property") and shall be attached to and made a part of the Listing Agreement.

1. **PRE-MARKETING LIMITATION:** Owner directs that Broker enter the Property listing in the Williamsburg Multiple Listing Service ("WMLS") under "coming soon" status and directs that their Property not be available for showings or for reviewing any and all offers to purchase by anyone during a pre-marketing period described below. Owner understands that during the pre-marketing period, the Property listing information will be made available to other WMLS participants and their clients and may be marketed as "Coming Soon".

2. **CLEAR COOPERATION:** Within one (1) business day of a property being marketed to the public, the listing Broker must submit the listing to the WMLS for cooperation with other WMLS participants as either "Active or "Coming Soon".

3. **PRE-MARKETING INSTRUCTIONS:**

A. Owner and Broker agree that the Listing Agreement is hereby modified as follows: Owner hereby directs Broker to list the Property in WMLS in "coming soon" status until FIELD B 20__ (maximum of 21 days from the date of ratification of the Listing Agreement by Owner).

B. Owner [select one]: ☐ authorizes OR ☐ does not authorize Broker to install a "For Sale" sign with "Coming Soon" rider on the Property while the Property is listed in the "coming soon" status.

4. **SHOWINGS/OFFERS:** While the property is entered in the WMLS under the "Coming Soon status, Broker is prohibited from showing the Property to prospective buyers and/or their agent. In addition, upon being informed by the Broker that an offer or offers have been received, the Owner is prohibited from reviewing any and all offers to purchase while the Property is listed in WMLS under the "Coming Soon" status. If Owner desires to have the Property shown to prospective buyers and/or their agents, or wishes to review offers that have been received, Owner understands that the Property status must be changed to "active" in WMLS. Once changed to "Active" status, the Property status cannot be changed back to "Coming Soon" status.

5. **COMPENSATION:** Owner acknowledges that an offer of compensation to cooperating buyer agents is required for the listing of the Property in WMLS, including in the "Coming Soon" status.

Witness the following duly authorized signatures:

Owner _____ Date _____ Owner _____ Date _____

Owner _____ Date _____ Owner _____ Date _____

Broker: _____
Signature of Broker or authorized agent _____ Date _____

Print name: _____

Field A - "Commence date" or date listing agreement was ratified, whichever is later (List Date)

Field B - Date the listing changes from "Coming Soon" to "Active" (Expected on Market Date)



Coming Soon FAQs

WMLS permits users to enter listings in the Coming Soon status. Review these frequently asked questions prior to using Coming Soon to ensure you remain in compliance.

1. How does Coming Soon work?

The Coming Soon status allows listing brokers and agents to place a listing in the MLS for cooperation for up to **21 calendar days** (except Rental Listings) while the property is prepared for showings (staging, professional interior photos, repairs, etc.). Because there are no showings allowed while the listing is in Coming Soon, Days on Market (DOM) will not accrue during the Coming Soon period. The listing will automatically update from Coming Soon to Active on Day 22 of the listing's input date or on "Expected on Market Date", whichever is earlier.

2. Can the Coming Soon status be extended beyond 21 days?

No. The 21-day limit on a listing in Coming Soon status cannot be extended under any circumstances and the MLS system will not allow you to select a date more than 21 days from the entry date. Should you need more time, you may place the listing in "temporary withdrawn" status.

3. How is Coming Soon Unique?

Coming Soon can only be used for a maximum of 21 days. Showings of any kind are not permitted, by the listing broker or otherwise. Days on Market do not accrue while in Coming Soon. Coming Soon listings go out from the MLS in listing syndication data feeds and in IDX data feeds.

4. When do the Days on Market for a listing start accumulating?

"Days on Market" or "DOM" for a listed property measures the number of days that a property is listed in the "Active" status until it is "Pended" in the MLS. Once a listing first appears as "Active", DOM will begin to accrue.

Please note: DOM is NOT a measure of how many days that the property has been in the MLS.

5. Can I market a Coming Soon listing?

Yes. A listing in the Coming Soon status may be marketed to any consumer, whether they are existing clients of the brokerage or not, by using flyers, For Sale signs, social media posts, etc., so long as the marketing clearly labels the listing as "Coming Soon." However, no showings or open houses may take place and offers of purchase may not be considered by the sellers.

6. What is considered “Marketing” and “Advertising”?

“Advertising” includes, but is not limited to: information about the property or its availability for sale displayed on any signs, websites, social media, brokerage or franchise operated websites, communications (verbal or written), multi-brokerage or franchise listing sharing networks, flyers or written material, or on any applications available to the public.

7. Are the Clear Cooperation rules a consideration for a listing in Coming Soon status?

Clear Cooperation rules require that any off-MLS listing that is marketed to the public must be entered in the MLS and display offers of cooperation within 1 business day of the marketing commencing. However, once a listing is in the MLS for cooperation, such as a Coming Soon listing, the concept of Public Marketing is irrelevant. Listings that are in the MLS can be marketed to anyone.

8. Who can see Coming Soon listings?

All WMLS users and data share partners can view Coming Soon listings in their MLS. WMLS users who have IDX or VOW data feeds can also access Coming Soon listings in those feeds. The public can view Coming Soon listings on sites that receive a WMLS IDX feed and choose to display this data.

9. Can a seller show their property or review offers to purchase in the status of Coming Soon?

No. Coming Soon listings cannot be shown by anyone, to anyone, under any circumstances. This includes but is not limited to Virtual Open Houses and Virtual Showings.

Please note: If the seller plans to show the property or review offers to purchase, the listing status must be made Active prior to the showing or offer review date.

10. Can I advertise a future open house while the property is in the Coming Soon status?

Yes. You can advertise an open house, disclose the date on which the property is available to be shown, and schedule showing for when the listing becomes “Active”. However, you may not show the property prior to the date disclosed unless you update the listing to the “Active” status.

11. What is the difference between an Office Exclusive Listing and a Coming Soon Listing?

Office Exclusive refers to listing agreements in which the seller has instructed that the listing may only be marketed within the broker's firm. The listing will not be entered into the MLS and cannot be marketed publicly. Written authorization from the seller must be on file and submitted to the WMLS upon request when excluding a listing from the MLS, including that the property will be subject to limited exposure, as it is not available for cooperation on the MLS.

The Coming Soon Addendum, Form 124 is an instruction from the Seller to input the property in the WMLS as a “Coming Soon” listing. This form includes disclaimers and disclosures regarding limitations to exposure, acceptance of offers to purchase e.g., property showings are not permitted while in Coming Soon status. Additionally, the Coming Soon addendum allows the seller to advise

when the property will be available for showings and review of offers to purchase.

12. Is a Coming Soon/ Pre-Marketing Addendum form required?

Yes. The Coming Soon Addendum (Form 124) is required and must be obtained from and signed by the seller(s) prior to using the Coming Soon status. However, you do not need to provide the form to WMLS unless requested.

13. Do I have to submit the Coming Soon form to WMLS?

No. The form must be obtained from and signed by the seller and kept in your office files, but you do not need to provide the form to the MLS unless requested.

14. Is a Listing Contract required for Coming Soon?

Yes, a valid listing agreement is required in order for the property to be entered into the MLS for cooperation. A listing entered in the MLS prior to an effective agreement being in place will result in a violation of WMLS Rules, and is subject to citation, a fine in the amount of \$500, and immediate removal of the listing.

15. I entered a listing as Active instead of Coming Soon. How do I fix it?

Please contact WMLS staff as soon as possible. Office hours are Monday-Friday, from 8:30am-4:30pm, phone: 757-757-253-0028.

16. Is a photograph still required for Coming Soon listings?

Yes, at least one exterior photograph that displays a substantial portion of the exterior structure of the property is required. Coming Soon listings are not exempt from this requirement.

17. Can I add a virtual tour to a Coming Soon listing?

Yes. WMLS provides a field to add an unbranded virtual tour URL.

18. Can an offer be presented or accepted while in the status of Coming Soon?

No. As outlined on Form 124 "Pre-Marketing Addendum to Exclusive Authorization to Sell, the Owner of the property agrees that during the coming soon period, no offers may be reviewed, negotiated or accepted and no showings are allowed. The listing may be changed to "Active" status at any time prior to the "Expected on Market Date" if the Owner wishes to show the property or review offers to purchase. Once a listing goes "Active" it cannot return to "Coming Soon" status.

19. Can a listing go from Coming Soon to Pending or Active with Contingencies?

No. While a listing is in Coming Soon status, Owner may not review offers to purchase submitted as a result of being listed in the WMLS listing database as a "Coming Soon". The listing must be changed to "Active" prior to an Owner reviewing or accepting an "offer to purchase".

20. Can I modify the Expected On Market Date once the listing is entered as Coming Soon?

Yes. You can make the change prior to the "Expected on Market Date". The new "Expected on Market Date" cannot exceed the 21-day time frame allotted for Coming Soon Listings.



REQUEST FOR CONTINUED "ACTIVE" STATUS AFTER RATIFICATION OF CONTRACT

My property is located at _____
(Address)
and currently listed with _____
(Name of Firm)

After accepting a contract to purchase, I wish to keep my property listed as ACTIVE in the Williamsburg Multiple Listing Service (WMLS) in order to continue to show the property.

I agree to the following conditions:

- a. My property will be equally available to all WMLS Participants and authorized users for showings.
- b. My agent will be required to disclose in the WMLS that my property is subject to a ratified contract with the contingencies marked below:

☐ First Right of Refusal ☐ Home/Other Inspection(s)
☐ POA/Condo ☐ Third Party Approval ☐ Other _____
- c. My agent will be required to add the following statement to both the "Agent Only Comments" and "Public Remarks" sections of my active listing: "Subject to a ratified contract with contingencies. Owner wishes to continue to show the property and will consider other offers."
- d. Upon request from other WMLS Participants and authorized users, my agent will be required to disclose any unsatisfied contingencies. When all contingencies have been satisfied/removed, I understand that my property must be marked as PENDING within five (5) business days in the Williamsburg MLS.

Signatures/Acceptance:

Owner 1

Owner2

Date

Broker/Agent

Date

**WILLIAMSBURG MULTIPLE LISTING SERVICE, INC.****ADDENDUM TO NON-VR LISTING AGREEMENT/EXCLUSIVE
AUTHORIZATION TO SELL AGREEMENT (VR FORM 400)**

This is an addendum to a listing agreement which is not a Virginia REALTOR® Exclusive Authorization to Sell dated: _____, _____, between _____ (Sellers) and _____ (Listing Firm) for the sale of property located at _____ (Address).

Sellers acknowledge(s) the Listing Firm's obligation and/or ability to submit this listing into the Williamsburg Multiple Listing Service (WMLS) and to ensure that all listing data is accurate and up-to-date. This Listing Agreement Addendum modifies an already existing market or listing agreement and therefore shall be attached to and made a part of said agreement.

A. Listing Data Authorization

All parties (seller(s), listing agent and listing firm) warrant that they are the sole owners of and hereby transfer to the Williamsburg Multiple Listing Service, Inc. (WMLS) rights of ownership and copyright to all data including any images, photographs, templates, animations, video, and audio pertaining to the Property named above. Seller(s) authorize the Listing Firm to submit data concerning the Property to the WMLS and understands that the WMLS may use the data for any lawful purpose as deemed necessary by the WMLS. All parties also authorize and agree to make available to all WMLS Participants and Subscribers all data regarding the Property, including offers of cooperation and compensation to the Selling Firm.

B. Advertising

- All parties understand that the listing data may get disseminated to third party websites through means other than the MLS.
- Owner acknowledges that the accuracy of the listing data is controlled by the third-party websites and is outside the WMLS and Broker's control.
- The Listing Firm is authorized to make access available to cooperating brokers and their clients and customers.
- Seller(s) authorize the dissemination of Property/sales information to WMLS Participants, including electronic format, magazines and other media.

C. Lockbox Authorization

Seller(s) hereby ☐ DOES or ☐ DOES NOT authorize the Listing Firm to place a WMLS lockbox on the property. **NOTE:** Seller(s) understand that, per WMLS Rules and Regulations, that if the Property is located in either James City County, City of Williamsburg, York County, Charles City County, or New Kent County and ANY lockbox has been authorized, then a WMLS lockbox must also be authorized.

D. Listing Dates for WMLS

Seller(s) authorize the Property to be listed in the WMLS commencing on _____ and expiring at midnight on _____.

E. No Seller(s) determination of WMLS Rules

Seller(s) understand that WMLS Listing Firms must abide by all local, state, federal and rules and regulations in connection with the listing and sale of the Property, including, but not limited to, the U.S. Fair Housing Act and the Rules & Regulations of the Williamsburg Multiple Listing Service.

(LISTING FIRM)_____
(SELLER)_____
DATE_____
(LISTING AGENT)_____
(SELLER)_____
DATE

WMLS R&R Help

- **Rock the Rules** – A 1 –2 hour online course focused entirely on the WMLS Rules and Regulations. Hosted by the WMLS Staff twice a year, it accredits attending members with a \$250 credit that can be used for one (1) violation of the Rules and Regs within the following year. (Only one (1) credit can be used within a calendar year)

- March 27th (9:30 – 11:00am)
- September 26th (9:30 – 11:00am)

NOTE: Admin and Unlicensed Staff are welcome to attend and the credit is transferrable to Brokers/Agents.

- **Staff to Staff** – A 1 - 2 hour in-person class provided by WMLS Staff and focused on Administrative and Staff topics. Lunch is provided.

- October 1st (12:00 – 2:00pm)

- **WMLS Administrator Contact information:**

Darragh Cutshaw

MLS Operations Manager

Williamsburg Area Association of Realtors®

5000 New Point Rd. Suite 1101

Williamsburg, VA 23188

Tel: (757) 253-0028 Direct: (757) 903-4015

Fax: (757) 253-1559

Darragh@WAAREaltor.com

WMLS Ancillary Products & Mobile Apps

Q & A Clareity Dashboard

➤ Q: What is the Clareity Dashboard?

A: A User-friendly SSO (Single Sign On) dashboard that includes Matrix and eliminates the need to remember multiple logins and passwords when accessing other applications such as RPR, SentiLock, etc.

➤ Q: How to access?

A: The website is www.wbgmls.clareityiam.net

➤ Q: What are the Benefits of the Clareity Dashboard?

A: WMLS Account Balance Displayed w/ option for 'Easy Pay'

A: WAAR Education/Training Calendar Displayed for reference & registration

A: Notification Center displays important messages from WMLS Staff

A: Easy access to REALTOR® tools, services and resources

A: Stay in the 'know' with WAAR's social media



SAFER SHOWINGS SMARTER ENGAGEMENTS

THE APP THAT PROVIDES REAL ESTATE AGENTS INCREASED SAFETY AND EFFICIENCY!

- ▶ Understand risk by verifying your prospect prior to showing a property, including any past criminal history.
- ▶ Verify your customer's profile to better serve each customer efficiently and effectively.

THE VALUE OF INSTANT DUE DILIGENCE WITH FOREWARN

Know your prospect... *in seconds*



Reverse incoming call to verify prospect
(name, phone, and address)



Instantly search for criminal history



Verify financial risks
(bankruptcies, liens, and judgments)



Verify current assets
(properties and vehicles)

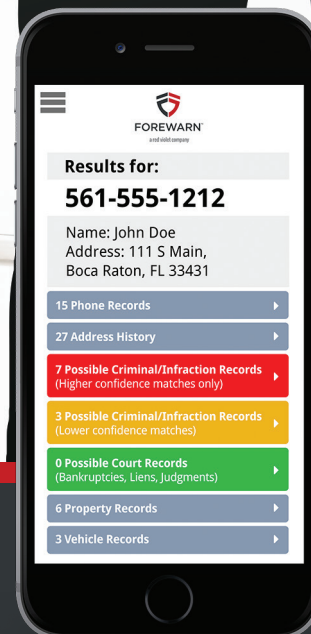
Agents can properly and safely plan for showings with a higher level of confidence.

FOREWARN is not a "consumer reporting agency" and its services do not constitute "consumer reports," as these terms are defined by the Fair Credit Reporting Act, 15 U.S.C. § 1681 et seq. ("FCRA"). FOREWARN services may not be used in whole or in part as a factor in establishing an individual's eligibility for credit, insurance, employment nor for any other purpose under the FCRA.

Contact Us Today!

www.FOREWARN.com | sales@forewarn.com | 888-424-9276

©2022 FOREWARN, LLC. All rights reserved.



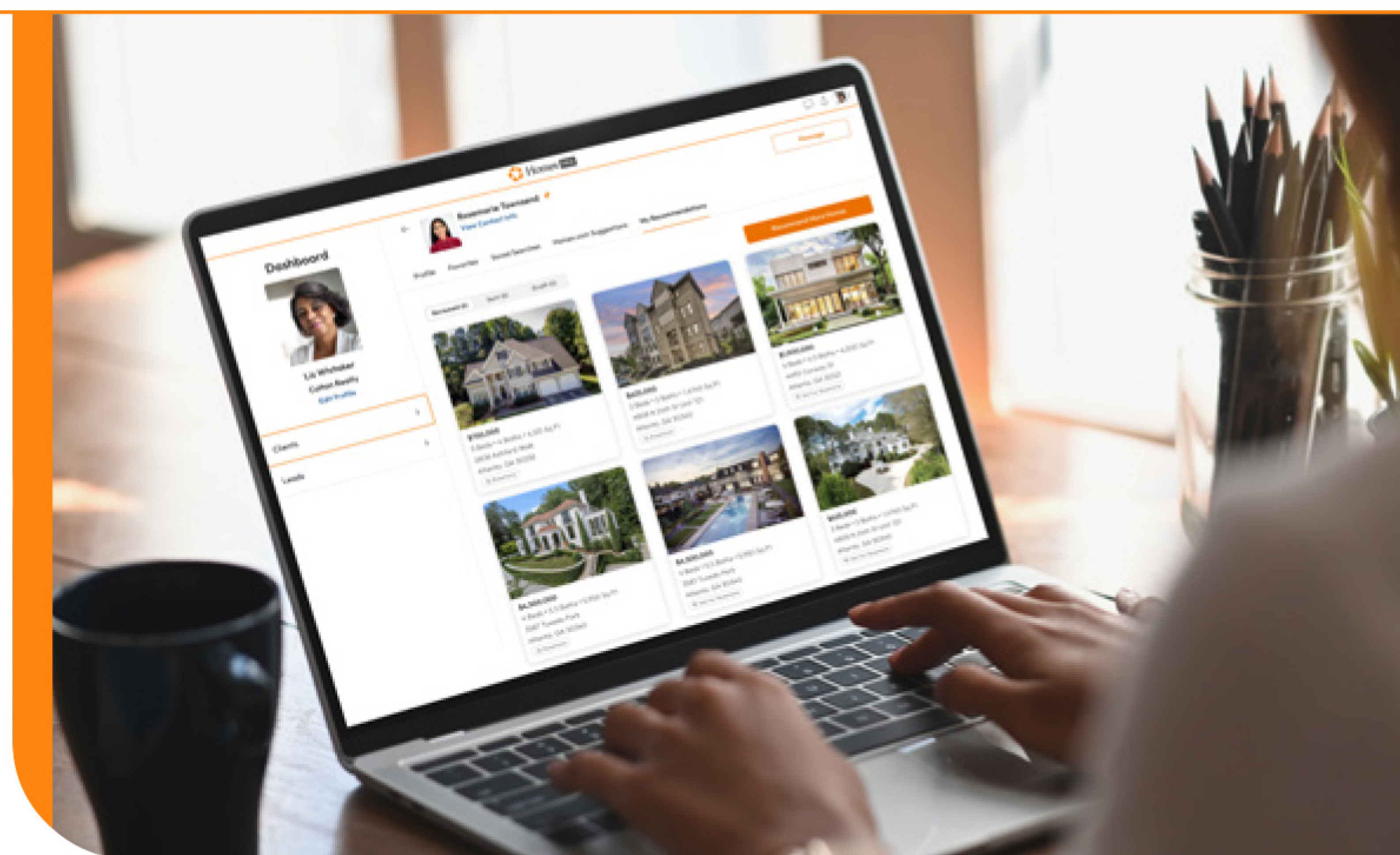
INTRODUCING

Homes PRO

A Better Way to do Real Estate

Homesnap Pro has been upgraded.

- Enhanced Features
- Better Collaboration
- More Homebuyers



Expect More. Do More.

More Leads

Homes.com is sending **millions of FREE leads** to agents.

Be The Expert

Stand out to new homebuyers and win new business. Updated agent profiles showcase your areas of expertise with sales history, awards, designations, client reviews, video, and more.



289%
YOY
TRAFFIC GROWTH

More Traffic

Millions of homebuyers are discovering a better way to search — and that is rapidly increasing every month. Traffic has **increased 289% YOY**.

Better Collaboration

Get real-time client search insights. Collaborate with buyers on the platform they are searching. Save searches, make recommendations, and review feedback all in one place.

Want to learn more?



Scan the QR code to register online

Register Now!

Weekly Agent Intro Webinars every Thursday at 2 PM EST!

The agent-friendly platform
homes.com/agents

Questions: Give us a call 800-431-5509 or email us at **support@homes.com**



Homesnap Pro is now Homes Pro

FREQUENTLY ASKED QUESTIONS

What is Homes Pro?

Homes Pro is the fastest-growing, agent-friendly home search platform in the industry that always maintains our promise: Your Listing. Your Lead. It allows you to manage everything in one central location, giving you the ability to collaborate with clients in a whole new way and provide unparalleled service.

How is Homes Pro different from Homesnap Pro?

Homes Pro is the new upgrade to Homesnap Pro with an improved user experience and with redefined features that will make it easier for you to collaborate with consumers and brand your business on the fastest growing home search site in the industry.

What's new on Homes Pro?

We've upgraded Homesnap Pro to bring you upgraded features to collaborate with consumers and clients which to include, saved searches, sending recommendations and the ability to receive feedback in a collaborative environment.

Why is Homes Pro better than Homesnap Pro?

Homes Pro includes the functionality you love from Homesnap Pro, with an improved and upgraded user experience, and more opportunities for agents to collaborate with their buyers and sellers. Homes.com has already surpassed Homesnap's popularity - that Homes.com is the preferred destination for homebuyers and their agents. Over 34 million consumers are visiting Homes.com each month, in turn generating millions of free leads for agents.

What does "Your Listing. Your Lead." mean?

Our promise of Your Listing. Your Lead means that we will never allow other agents to advertise their business on your listings.

When will Homes Pro be available?

Homes Pro is available now for you to start getting acquainted with its features and connecting with your clients. If you were a prior Homesnap Pro user, all your client connections have been transferred over to Homes Pro already. We will continue to add new features weekly for you to familiarize yourself with.

How do I login to Homes Pro?

You can use your existing Homesnap email and password to login. Go to Homes.com, click the Login link in the top right.

Does Homes Pro have a mobile app?

Yes, Homes Pro has a mobile app upgrade to the Homesnap Pro app. Simply download the Homes.com app and login with your Homesnap email and password.

How will my other Homesnap products (Pro+ and Concierge) be affected?

At this time, there will be no interruption to your Homesnap Pro+ or Homesnap Concierge products.

Will Listing Ads be affected?

At this time Listing Ads will function just as they did on Homesnap. We are working behind the scenes to create an even better experience for Listing Ad users on Homes Pro in the near future.

What happens to my connections, messages, and data from Homesnap Pro?

Your data has already been migrated over to Homes Pro for you to make this transition as seamless as possible. Once you login you will notice your saved contacts, invited client connections, favorite listings and saved searches are all right there at your fingertips.

What happens with the clients I was working with in Homesnap Pro?

Your saved contacts and invited client connections have been migrated to Homes Pro, and your clients can now use the upgraded Homes.com experience to search for listings and collaborate with you. Stay on top of your clients' needs by making recommendations, exchanging feedback, sending messages, and tracking their activity and favorites. These valuable insights will help you provide exceptional service as you guide your clients towards finding their perfect home.

What should you do when you first login to Homes Pro?

While most of your data from your Homesnap Pro Profile has already been moved over, you should check out your Agent Profile to make sure everything looks good and is up-to-date. Homes Pro agent profiles now allow you to include a comprehensive bio, add additional pictures and video too!

From here, you can:

- Update your headshot and bio.
- Showcase your awards, designations and accomplishments.
- Share videos and social media profile to deepen your connections.

Why does one individual in my office, who is a part of another MLS, have different access to features than I do?

Most MLS's make Homes Pro available to their subscribers, providing a full MLS data feed to power certain Homes Pro agent features, like off market listings and other agent only fields. However, some MLSs do not yet provide a full data feed, and certain agent only fields and status types may not be accessible in Homes Pro. Regardless of your MLS affiliation, you can still claim your Homes Pro account and Homes.com profile at <https://www.homes.com/agents>.

Once you claim your profile, you will have access to the same features as other agents in Homes Pro - for free!

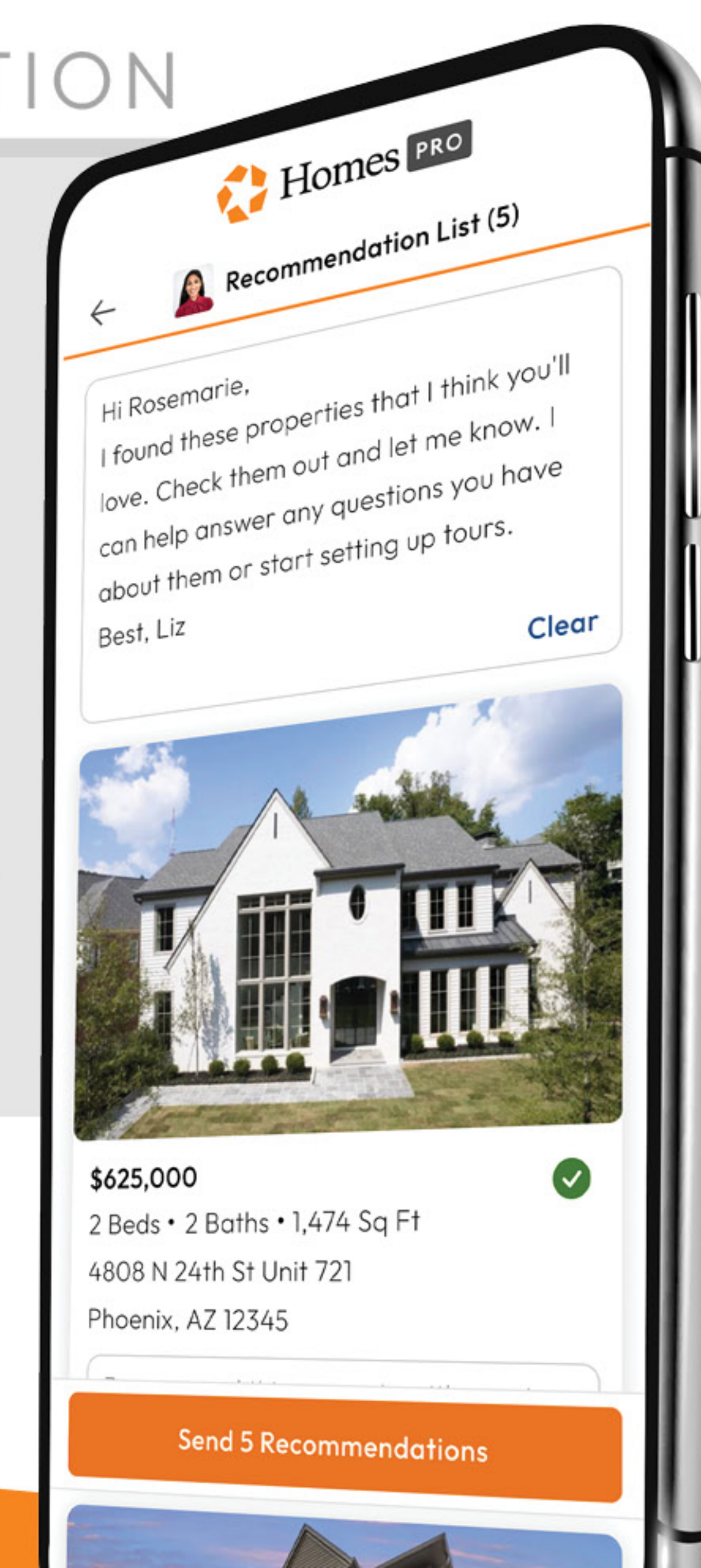
Still Have Questions?
Support is always available.

IMPORTANT INFORMATION

For users who would like to learn more, have questions, or need assistance with their logins, Homes.com will be hosting weekly webinars to educate on different and new features of Homes Pro.

Agents can register at:
homes.com/agents

Additionally, the Homes.com support team is ready and on standby for assistance at support@homes.com or (800) 431-5509.





EXCLUSIVE REALTOR® BENEFIT

RPR is 100% owned and operated by the National Association of REALTORS® as a member benefit for all REALTORS®. Only REALTORS® can access RPR.

BIG DATA YOU CAN USE

RPR gathers all available data on a property and organizes it for your benefit. Add your local market knowledge and you're set.

SEARCH MLS & CIE + PUBLIC RECORDS

From MLS/CIE and public records to mortgage history and school attendance zones, RPR has the data your clients want.

INDUSTRY LEADING REPORTS

Customizable reports for any property are available from your iOS or Android device. Send reports directly to your clients, with your branding, with almost no effort.

ADD NOTES AND PHOTOS

Add your own notes and photos to any property. They're private to you, but you can easily include them in your reports.

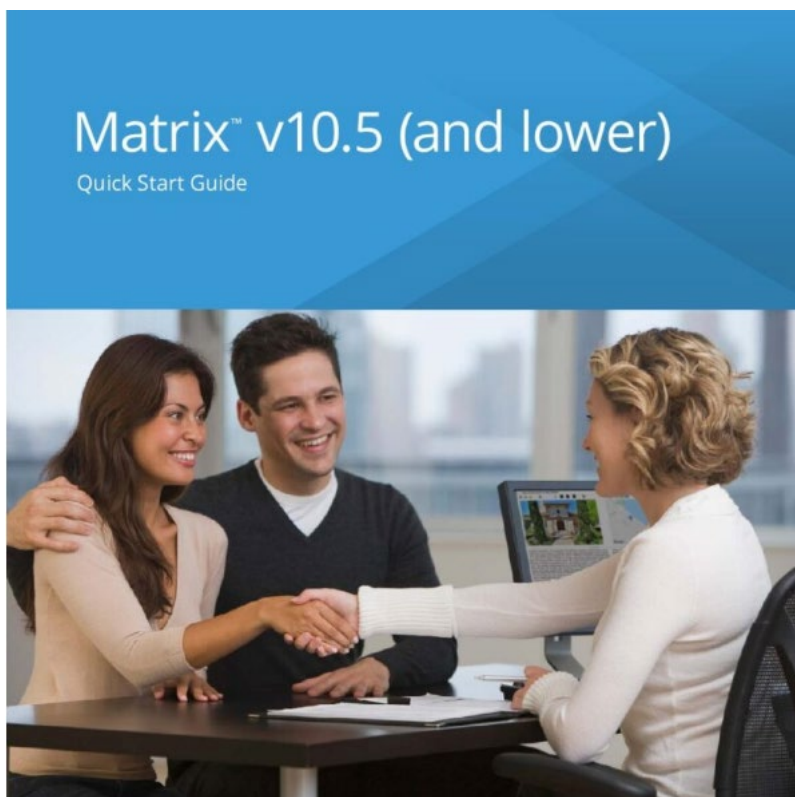
EVERYTHING IN SYNC

Favorites, reports, recent searches and notes sync between RPR's mobile app and website, ensuring your productivity.

An Overview of Matrix

CORELOGIC'S MATRIX IS THE PLATFORM THE WMLS OFFERS MEMBERS TO INPUT THEIR LISTINGS INTO THE WMLS DATABASE. IT IS CUSTOMIZABLE, USER FRIENDLY AND OFFERS TRAINING GUIDES, VIDEO TUTORIALS, AND SUPPORT WITH THEIR TOLL-FREE ANSWERLINK HOTLINE: 844-209-0140

CTRL + Click the picture below to view the Quick Start Guide



WMLS Matrix Tips & Tricks

- Certain tabs may not be available due to access level or 'Team Settings'
- 'Active, Incomplete, Coming Soon, Pending, Temp Withdrawn and Sold' statuses are available to all WMLS Users. **NOTE:** 'Released' status is ONLY available to Brokers and authorized company staff
- Input forms are available in 'External Links' and 'Transaction Desk'
- Start a new listing from the property Tax ID Number (auto-populates certain fields from Realist, if available)
- Help Icons are available
- In order for listings to be syndicated to Zillow/Trulia/etc. you must answer YES to all 4 questions in the 'Internet Display Info' section when inputting a listing.

Listing Status Guidelines

ACTIVE:

- ...A fully ratified listing agreement is required
- ...Listing must be “Active” within three (3) days of the date ratified (or commencement date) OR within one (1) day of public marketing, whichever comes first
- ...Property is available to be shown to prospective buyers

ACTIVE/UNDER CONTRACT WITH CONTINGENCIES:

- ...Listing can remain “active/continue to show” after a contract to purchase has been accepted, with one or more contingencies
- ...WMLS Form 125 must be executed and the conditions on the form met
- ...After all contingencies have been fulfilled, renewed, or cancelled, the listing must be changed to “Pending” within three (3) business days

PENDING:

- ...A contract to purchase has been accepted and fully ratified
- ...Listing must be changed to “Pending” within three (3) business days after contract is ratified
- ...“Contingency Exception”-Allows listing to remain active when seller wants to continue to show and consider back-up offers. WMLS Form 125 is required and all conditions on the form met.

CLOSED (Sold or Leased):

- ...Used for all property types when sold and leased rentals
- ...The purchase agreement has been fulfilled or the lease agreement has been fully executed
- ...Listing must be changed to “Closed” within seven (7) business days of closing date

COMING SOON:

- ...The property cannot be shown and no offers can be reviewed while in “Coming Soon” status
- ...WMLS Form 124 is required and details the conditions of use

TEMP WITHDRAWN:

- ...Used to temporarily discontinue marketing the property
- ...Property is not available to show
- ...Listing Agreement remains in effect
- ...Days on Market stop accruing while in “Temp Withdrawn” status

*RELEASED:

- ...The listing agreement has been released, terminated, or cancelled (NOT to be used when releasing a contract to purchase or to release a listing prior to it's expiration date in order to re-enter as a “new” listing)

EXPIRED:

- ...The expiration date for the listing has come and gone
- ...With the seller's written authorization, MLS users may extend the listing for up to ten (10) calendar days after expiration

RESIDENTIAL DATA INPUT FORM
SHADING INDICATES THE FIELD IS REQUIRED

PAGE 1 of 9

**START A NEW LISTING FROM
TAX RECORD**

1) Start New listing from Tax Record (auto population function*):

Select this if the listing being added is in one of the jurisdictions listed below.

Highlight the correct "Tax County" (includes cities) for the listing being added and use the fields to the right of the "Tax County" list to locate the tax record, then select "Search" at the bottom of the screen. When the record(s) is displayed, click the "Fill" hyperlink to the left of the record.

2) Start new listing:

Select this if the property being added is NOT in one of the tax counties/cities listed OR if the tax record could not be found by using steps in Item #1 above.

3) Copy from existing listing:

Select this to have the system auto-copy certain data fields from an existing on or off market listing. NOTE: The copied listing MUST be your own listing.

*The Autopopulation function should be used if the listing being added is in one of the jurisdictions in the tax database. Must exactly match Parcel ID (PID) in the tax record.

TAX COUNTY (1)

Select from County/City
table in add/edit

WILLIAMSBURG

JAMES CITY COUNTY

NEW KENT COUNTY

YORK COUNTY

CHARLES CITY COUNTY

(More...)

Tax ID

Street Number

Street Name

Owner Last Name

STATUS INFORMATION

Listing Status Options

INCOMPLETE Listings are assigned an MLS# but are not entered into the MLS database and any information you have provided will NOT be available to MLS users.

ACTIVE Listings are entered into the MLS database and the information you have provided will be made available to all MLS users.

COMING SOON The Coming Soon status indicates that the agent and the property owner are preparing the property for sale, but it is not ready for full marketing and showing. WMLS "Coming Soon" Addendum Form 124 is required. Refer to WMLS Rules & Regulations for restrictions and requirements of Coming Soon Status.

LISTING INFORMATION

Type:

☐ Attached
☐ Detached

County / City: _____

List Price: _____

List Date: __/__/____

Ownership Type:

☐ Fee Simple
☐ Condominium

Expected On Market Date: __/__/____
(To be used ONLY if Coming Soon Status is Chosen)

Expire Date: __/__/____

Contingent Y/N ____

Contingent Date _____
(Date Listing Went Under Contract)

Contingency Type (To be used only if "Active/Contingent, Continue to Show" applies):

☐ First Rgt of Refusal
☐ Home Sale With Kick Out Clause
☐ Other/Call Agent
☐ Home/Other Inspection
☐ POA/Condo
☐ Third Party Approval

PID: _____

PID - The Autopop function should be used if the listing being added is in one of the jurisdictions in the tax database. Must exactly match Parcel ID (PID) in the tax record

RESIDENTIAL DATA INPUT FORM

SHADING INDICATES THE FIELD IS REQUIRED

PAGE 2 of 9

LOCATION INFORMATION

Street #: _____ Street Dir Prefix: _____ Street Name: _____ Street Suffix: _____ Street Dir Suffix: _____

City (mailing address): _____ Zip: _____ Unit #: _____ Unit Level: _____

___ New (Y/N) New Type (Req'd if "New"=Y) Year Built: _____ Year Built Description: _____

Select one: ☐ Model
☐ Proposed/To Be Built
☐ Under Construction
☐ New Construction

Subdivision: _____ Neighborhood: _____ (Req'd if Sub = None)

Total Finished SqFt: _____ Total Un-Fin SqFt: _____ Fin SqFt Below Grade: _____ Fin SqFt Above Grade: _____

SqFt Source: _____ # Levels: _____ # Rooms: _____ # Bedrooms: _____
☐ Per Appraiser ☐ Per Owner
☐ Per Architect ☐ Per Tax
☐ Per Builder ☐ Other Acres: _____ Lot Dimensions: _____ x _____

Elementary School: _____ Middle School: _____

High School: _____

Directions (215 characters): _____

ROOM INFORMATION

ROOM LEVEL REQUIRED FOR ALL ROOMS SELECTED

Room Type (min of 1 required)	Room Length Feet . Inches	X	Width Feet . Inches	Room Level	Room Description (50 characters)
Primary Bedroom:	_____	X	_____	_____	_____
Primary Bedroom 2:	_____	X	_____	_____	_____
Bedroom 1:	_____	X	_____	_____	_____
Bedroom 2:	_____	X	_____	_____	_____
Bedroom 3:	_____	X	_____	_____	_____
Bedroom 4:	_____	X	_____	_____	_____
Bedroom 5:	_____	X	_____	_____	_____
Bonus Room:	_____	X	_____	_____	_____
Dining Room:	_____	X	_____	_____	_____
Family/Great Room:	_____	X	_____	_____	_____
Foyer:	_____	X	_____	_____	_____
Kitchen:	_____	X	_____	_____	_____
Laundry/Util Room:	_____	X	_____	_____	_____

RESIDENTIAL DATA INPUT FORM

PAGE 3 of 9

SHADING INDICATES THE FIELD IS REQUIRED

Living Room:	_____X_____		
Office/Study:	_____X_____		
Sun Room:	_____X_____		
Additional Room 1:	_____X_____		
Additional Room 2:	_____X_____		
Additional Room 3:	_____X_____		

BATH INFORMATION

Bath Description	# of Full Baths	# of Half Baths
Level 1	_____	_____
Level 2	_____	_____
Level 3	_____	_____
Level 4	_____	_____
Basement	_____	_____

FEATURES

STYLE	STRUCTURE	SIDING	ROOF	FLOORING
___ 2-Story	___ Block	___ Aluminum	___ Asphalt Shingle	___ Bamboo
___ A-frame	___ Concrete	___ Asbestos	___ Composite	___ Carpet
___ Cape	___ Frame	___ Asphalt	___ Concrete	___ Concrete
___ Colonial	___ Log	___ Block	___ Green	___ Cork
___ Contemporary/Modern	___ Metal	___ Brick	___ Metal	___ Laminate
___ Cottage/Bungalow	___ Other	___ Cedar	___ Other	___ Linoleum
___ Craftsman	___ Stone	___ Cedar Shake	___ Poly Skin	___ Stone
___ Dutch Colonial	___ Wood	___ Clapboard	___ Reflective	___ Tile
___ Farm House		___ Glass	___ Slate	___ Vinyl
___ Green Certified Home		___ Hardiplank	___ Tar & Gravel	___ Wood
___ Log		___ Log	___ Tile	___ Wood-Parquet
___ Manufactured Home		___ Other	___ Vinyl	
___ Mediterranean/Spanish		___ Shingle	___ Wood Shingle	
___ Modular		___ Steel		
___ Other		___ Stone		
___ Patio Home		___ Stucco		
___ Ranch		___ Synth Stucco		
___ Saltbox		___ T111		
___ Split Foyer		___ Vinyl		
___ Townhouse				
___ Transitional				
___ Tri-Level/Quad Level				
___ Tudor				
___ Victorian				

UNIT PLACEMENT	WALL TYPE	ATTIC
___ Corner Unit	___ Block	___ Access Panel
___ Detached	___ Brick	___ Expandable
___ End Unit	___ Drywall	___ Finished
___ Interior Unit	___ Glass	___ Floored
___ Lower Level	___ Glass Block	___ No Attic
___ Middle Level	___ Mixed	___ Part Finished
___ Street Level	___ Other	___ Pull Down
___ Top Level	___ Paneling	___ Walk-In
___ Walkout	___ Plaster	___ Walk-Up
	___ Wood	

RESIDENTIAL DATA INPUT FORM

SHADING INDICATES THE FIELD IS REQUIRED

PAGE 4 of 9

PARKING

- ☐ Assigned
- ☐ Carport
- ☐ Circular Drive
- ☐ Common Drive
- ☐ Covered
- ☐ Double Width
- ☐ Off Street
- ☐ On Street
- ☐ Open Lot
- ☐ Paved Driveway
- ☐ Underground
- ☐ Unpaved Driveway
- ☐ Visitor

GARAGE Y/N

- ☐ Yes
- ☐ No

CARS (Req'd if Garage=Y)

- ☐ 1
- ☐ 1.5
- ☐ 2
- ☐ 2.5
- ☐ 3+

GARAGE (Req'd if Garage=Y)

- ☐ Apartment
- ☐ Attached
- ☐ Auto Door Opener
- ☐ Basement
- ☐ Detached
- ☐ Direct Entry
- ☐ Finished
- ☐ Golf Cart
- ☐ Heated
- ☐ Other
- ☐ Oversized
- ☐ Pedestrian Door
- ☐ Side/Rear Load
- ☐ Storage Above
- ☐ Unfinished
- ☐ Workshop

FP: __

FIREPLACE

- ☐ Brick
- ☐ Direct Vent
- ☐ Electric
- ☐ Fireplace Insert
- ☐ Gas
- ☐ Non-Vented
- ☐ Non-Working
- ☐ Stone
- ☐ Wood Burning

INTERIOR

- ☐ 9 Ft + Ceilings
- ☐ Atrium
- ☐ Bay/Bow Window
- ☐ Beamed Ceiling
- ☐ Breezeway
- ☐ Built In Cabinet/Bookcases
- ☐ Butlers Pantry
- ☐ Cathedral Ceiling
- ☐ Ceiling Fan
- ☐ Countertops - Granite/Stone
- ☐ Countertops - Laminate
- ☐ Countertops - Solid Surface
- ☐ Countertops - Tile
- ☐ Dining Area
- ☐ Double Vanity
- ☐ Dryer Hookup
- ☐ Eat-In-Kitchen
- ☐ Elevator
- ☐ Fire Sprinkler
- ☐ Formal Dining Room
- ☐ French Doors
- ☐ Garden Tub
- ☐ In-Law Suite
- ☐ Internal Balcony
- ☐ Island
- ☐ Jetted Tub
- ☐ Loft
- ☐ Other
- ☐ Pantry
- ☐ Recessed Lighting
- ☐ Rough-In Bath
- ☐ Sauna
- ☐ Security System
- ☐ Separate Suite
- ☐ Skylight
- ☐ Solar Tube
- ☐ Stack Wshr/Dryer Hookup
- ☐ Steam Shower
- ☐ Track Lighting
- ☐ Tray Ceiling
- ☐ Walk-In Closet
- ☐ Washer Hookup
- ☐ Wet Bar
- ☐ Window Treatment
- ☐ Workshop

BASEMENT Y/N

- ☐ Yes
- ☐ No

BASEMENT/FOUNDATION (Req'd if Basement=Y)

- ☐ Basement-Full
- ☐ Basement-Partial
- ☐ Crawl Space
- ☐ Dirt
- ☐ Finished-Com
- ☐ Finished-Part
- ☐ Floored
- ☐ Garage Access
- ☐ Heated
- ☐ Interior Access
- ☐ Locked Storage
- ☐ Other
- ☐ Roughed In
- ☐ Slab
- ☐ Unfinished
- ☐ Walk-Out
- ☐ Workshop

FENCED Y/N

- ☐ Yes
- ☐ No

FENCED (Req'd if Fenced Y/N = Y)

- ☐ All Fenced
- ☐ Barbed
- ☐ Board
- ☐ Cedar
- ☐ Chain Link
- ☐ Combination
- ☐ Decorative
- ☐ Electric
- ☐ Front Only
- ☐ Invisible
- ☐ Metal
- ☐ Part Fenced
- ☐ Picket
- ☐ Privacy
- ☐ Rear Only
- ☐ Security
- ☐ Split Rail
- ☐ Vinyl/PVC
- ☐ Wall

EXTERIOR

- ☐ Awnings
- ☐ Back Porch
- ☐ Balcony
- ☐ Controlled Access
- ☐ Deck
- ☐ Front Porch
- ☐ Insulated Doors
- ☐ Irrigation System
- ☐ Lead Glass Windows
- ☐ Other
- ☐ Outdoor Lighting
- ☐ Palladian Windows
- ☐ Patio
- ☐ Porch
- ☐ Private Storage
- ☐ Screens
- ☐ Screened Porch
- ☐ Side Porch
- ☐ Sliding Doors
- ☐ Stained Glass
- ☐ Stoop
- ☐ Storm Doors
- ☐ Storm Windows
- ☐ Swing Sets
- ☐ Tennis Court
- ☐ Thermal Windows
- ☐ Wrap Around Porch

ADDITIONAL STRUCTURE

- ☐ Barn
- ☐ Cabin
- ☐ Cottage
- ☐ Dairy
- ☐ Feed Barn
- ☐ Greenhouse
- ☐ Manufactured/Mobile Home
- ☐ Modular
- ☐ Pump House
- ☐ Shed
- ☐ Smoke House
- ☐ Stable
- ☐ Storage
- ☐ Tack Room

RESIDENTIAL DATA INPUT FORM
SHADING INDICATES THE FIELD IS REQUIRED

PAGE 5 of 9

APPL/EQUIP

☐ Attic Fan
☐ Central Vac
☐ Compactor
☐ Dishwasher
☐ Disposal
☐ Double Oven
☐ Dryer
☐ Electric Cooking
☐ Exhaust Fan
☐ Fire Sprinkler System
☐ Freezer
☐ Gas Cooking
☐ Gas Grill Connection
☐ Generator
☐ Generator Wired
☐ Hot Tub
☐ Ice Maker
☐ Intercom
☐ Microwave
☐ Range
☐ Refrigerator
☐ Smoke Alarm
☐ Stack Washer/Dryer
☐ Stove
☐ Stove Hood
☐ Sump Pump
☐ Timer Thermostat
☐ Wall Oven
☐ Washer
☐ Water Purifier
☐ Water Softener
☐ Wine Cooler

WATER HEATER

☐ Central Source
☐ Electric
☐ Instant Hot
☐ Insulated
☐ Natural Gas
☐ Off Furnace
☐ Oil
☐ Other
☐ Propane Gas
☐ Recirculating
☐ Solar
☐ Tank
☐ Tankless

ACCESSIBILITY EQUIPPED Y/N

☐ Yes
☐ No

ACCESSIBILITY FEATURES
(Req'd if Acc. Equip. = Y)

☐ Additional Features
☐ Auditory Alarms
☐ Chair Lift
☐ Comfort Height Switches
☐ Entry Level Accessible Full Bath
☐ Entry Level Accessible Kitchen
☐ Entry Level Bedrooms
☐ Entry Ramp
☐ Grab Bars
☐ Roll In Shower
☐ Roll Under Sink
☐ Shower Seat
☐ Stair Lift
☐ Stepless Entry
☐ Variable Height Cabinets
☐ Variable Height Counters
☐ Visual Alarms
☐ Wheelchair Adapted
☐ Wide Doorways or Min. 32"
☐ Wide Doors

GREEN/ENERGY EFFICIENT

☐ EarthCraft
☐ Energy Star Appliances
☐ Energy Star/House
☐ Home Performance
☐ w/Energy Star
☐ Leed for Homes
☐ National Green Building Std.
☐ Solar Feature(s)
☐ Other

HEATING

☐ Baseboard
☐ Electric Air Clean
☐ Forced Hot Air
☐ Geothermal
☐ Heat Pump
☐ Hot Water
☐ Humidifier
☐ Other
☐ Radiant
☐ Radiator
☐ Wood Stove
☐ Zoned

Other Desc: (Req'd if Heating = Other) _____

HEAT/FUEL

☐ Coal
☐ Electric
☐ Multi-Fuel System
☐ Natural Gas
☐ None
☐ Oil
☐ Other
☐ Propane Gas
☐ Wood

Other Desc: (Req'd if Heat/Fuel = Other) _____

COOLING

☐ Central Air
☐ Electric
☐ Gas A/C
☐ Geothermal
☐ Heat Pump
☐ Indiv Window Wall Units
☐ None
☐ Other
☐ Whole House Fan
☐ Zoned

Other Desc: (Req'd if Cooling = Other) _____

WATER SOURCE

☐ Community Well
☐ Public Water
☐ Well
☐ Other

SEWER/SEPTIC

☐ Alternative Septic
☐ Community Sewer
☐ Conventional Septic
☐ Grinder Pump
☐ Lift Pump
☐ Other
☐ Public Sewer

Maintenance Contract Y/N
(Req'd if Sewer/Septic = Alternative Septic and/or Grinder Pump or Lift Pump)

☐ Yes
☐ No

IRRIGATION SOURCE

☐ Creek/Stream
☐ Lake
☐ Pond
☐ River
☐ Well

PRIVATE POOL Y/N

☐ Yes
☐ No

POOL DESCRIPTION
(Req'd if Pool = Y)

☐ Above Ground
☐ Covered
☐ Fenced
☐ Heated
☐ In Ground
☐ Indoor
☐ Lap Pool
☐ Other
☐ Outdoor
☐ Pool Equipment
☐ Pool House
☐ Salt Water
☐ Self-Cleaning

RESIDENTIAL DATA INPUT FORM

PAGE 6 of 9

SHADING INDICATES THE FIELD IS REQUIRED

COMMUNITY AMENITIES

- ☐ Basketball
- ☐ Beach
- ☐ Boat Ramp
- ☐ Clubhouse
- ☐ Common Area
- ☐ Common Laundry
- ☐ Community Room
- ☐ Dock
- ☐ Exercise Room
- ☐ Extra Storage
- ☐ Gated Community
- ☐ Golf Course
- ☐ Hot Tub
- ☐ Jogging Path
- ☐ Kiddie Pool
- ☐ Lake/Pond
- ☐ Lifeguard
- ☐ Maintenance Free
- ☐ Marina
- ☐ Other
- ☐ Picnic Area
- ☐ Playground
- ☐ Pool
- ☐ Professional Management
- ☐ Public Park
- ☐ Putting Green
- ☐ Resident Manager
- ☐ Road Maintenance
- ☐ RV/Boat Storage
- ☐ Sauna
- ☐ Security Guard
- ☐ Spa
- ☐ Sports Field
- ☐ Tennis Court

Waterfront Y/N

- ☐ Yes
- ☐ No

Water Frontage: _____

Body of Water: _____

WATER FEATURES

- ☐ Access
- ☐ Bay Frontage
- ☐ Beach
- ☐ Boathouse
- ☐ Boat Lift
- ☐ Canal
- ☐ Creek Frontage
- ☐ Dock/Pier
- ☐ Lake
- ☐ Lake Frontage
- ☐ Marsh
- ☐ MLW 0-2 Ft
- ☐ MLW 2-4 Ft
- ☐ MLW 4-6 Ft
- ☐ MLW 6+ Ft
- ☐ Navigable
- ☐ Ocean/Bay Frontage
- ☐ Pond
- ☐ Riparian Rights
- ☐ River
- ☐ River Frontage
- ☐ Stream
- ☐ Walk To Water

Golf Frontage Y/N

- ☐ Yes
- ☐ No

Golf View/Frontage

- ☐ Cart Path Side
- ☐ Fairway
- ☐ Green
- ☐ Tee
- ☐ View

FARM TYPE

- ☐ Cattle
- ☐ Crops
- ☐ Dairy
- ☐ Horse
- ☐ Livestock
- ☐ Nursery
- ☐ Orchard
- ☐ Poultry
- ☐ Tree

RESTRICTIONS

- ☐ Age-Restricted Community
- ☐ Assoc Restrictions
- ☐ Deed Restrictions
- ☐ Easement
- ☐ Environmental/RPA
- ☐ Designated Historic
- ☐ Other
- ☐ Subdivision Restrictions

Allow Onsite:

- ☐ Boats
- ☐ Chickens
- ☐ Horses
- ☐ Pets
- ☐ Pets w/Restriction
- ☐ Recreational Vehicles
- ☐ Rentals
- ☐ Trucks/Trailer

RESIDENTIAL DATA INPUT FORM
SHADING INDICATES THE FIELD IS REQUIRED

PAGE 7 of 9

GENERAL INFORMATION

Tax Year: _____ Annual Taxes: _____ Assessed Value: _____

Current Zoning: _____

Legal (75 characters): _____

Investor Rental Cap (Y/N)

____ Yes

____ No

Home Warranty: _____

Items That Do Not Convey (200 characters)

Minimum Deposit: _____

Pre Qual Letter
(Y/N)

____ Yes

____ No

Deposit Held By: _____

HOA/Condo

____ Yes

____ No

Membership
Required?

____ Yes

____ No

Combined
Monthly Fees
Amt (Req'd
if HOA = Y)

Association Fee Desc:

____ Community Association

____ Condo Association

____ Owners Association

Add'l
Fee(s)
Y/N

____ Yes

____ No

Add'l Fee(s)
(Req'd if Y)

* Autosum from below

\$: _____

Add'l Capital Contribution Fee

*\$: _____

Add'l Transfer Fee

*\$: _____

Add'l Other Fee

*\$: _____

Add'l Other Fee Description (50
characters): _____

SALE TERMS

____ Assump Fixed

____ Assump Second

____ Assump Variable

____ Cash

____ Conventional

____ Federal Land

____ FHA

____ Lease Purchase

____ Negotiable

____ Owner May Finance

____ Private

____ Rehab Loan

____ USDA

____ VA

____ VHDA

____ Will Trade/1031

Disclosures Attached
(Select all that apply)

____ Lead Disclosure

____ Not Required

____ Office Disclosure

____ Other(s)

____ Property (DPOR)

HOA Fee Includes:

____ Building Insurance

____ Clubhouse

____ Comm Area Maintenance

____ Common Area

____ Community Utilities

____ Exterior Maintenance

____ Gas

____ Heat

____ Hot Water

____ Janitorial

____ Landscaping

____ Limited Exterior Maint.

____ Limited Yard Maintenance

____ Management Fees

____ Pool

____ Recreational Facilities

____ Reserves

____ Road Maintenance

____ Security

____ Sewer

____ Snow Removal

____ Trash Removal

____ Water

____ Water Access

____ Yard Maintenance

SHADING INDICATES THE FIELD IS REQUIRED

REMARKS

Public Remarks (1200 characters):

[illegible]

Agent Only Comments (512 characters):

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476	477	478	479	480	481	482	483	484	485	486	487	488	489	490	491	492	493	494	495	496	497	498	499	500	501	502	503	504	505	506	507	508	509	510	511	512	513	514	515	516	517	518	519	520	521	522	523	524	5
---	---	---	---	---	---	---	---	---	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	---

OWNER INFORMATION

Owner Name #1: _____ Owner Name #2: _____

Owned By

☐ Corporate
☐ Estate
☐ Individuals
☐ Other
☐ Partnership
☐ REO
☐ Relocation

Occupied By:

☐ Other
☐ Owner
☐ Tenant
☐ Under Construction
☐ Vacant

Owner Agent (Y/N) ☐

___ Yes
___ No

Agent Related to Seller (Y/N)

☐ Yes
☐ No

Foreclosure: (Y/N)

☐ Yes
☐ No

Short Sale: (Y/N)

☐ Yes
☐ No

Possession

☐ At Closing
☐ Immediate
☐ Negotiable
☐ Other
☐ Tenant Rights

AGENT/OFFICE INFORMATION

List Agent Code: _____

List Agent Name: _____

[illegible]

List Office Name:

Co-List Agent Code: _____

Co-List Agent Name: _____

List Type:

Limited Rep (Y/N):

☐ Exclusive Agency ☐ Yes
☐ Exclusive Right ☐ No
 Other _____

Co-List Office Name: _____

RESIDENTIAL DATA INPUT FORM
SHADING INDICATES THE FIELD IS REQUIRED

PAGE 9 of 9

COMPENSATION INFORMATION

Selling Firm Comp Type

☐ Percent
☐ Flat Fee
☐ Structured Comp

Selling Firm Comp Amount: (Req'd if Selling Firm Comp Type = Percent or Flat Fee)

Dual/Var Comp (Y/N)

☐ Yes
☐ No

Structured Comp Description (Req'd if Selling Firm Comp Type = Structured Comp)(250 characters): _____

Compensation Remarks (250 characters): _____

Bonus: (Y/N)

☐ Yes
☐ No

Bonus Description (Req'd if Bonus = Y) (50 characters):

SHOWING INSTRUCTIONS

Showing Instructions (1)

☐ Accompany Show
☐ Appt. Required
☐ Go Direct

LockBox Type (Choose all that apply)

☐ WMLS Sentrilock
☐ Other Sentrilock
☐ Combo
☐ No Lockbox per Seller's Request
☐ Supra

WMLS Sentrilock Serial LB # _____

(Req'd if Lockbox Type = WMLS Sentrilock)

Additional Showing Instructions: _____

VIRTUAL TOUR INFORMATION

NOTE: ENTER WEB ADDRESS(S) FOR EACH VIRTUAL TOUR

PLEASE NOTE THAT VIRTUAL TOURS CANNOT BE BRANDED OR CONTAIN CONTACT INFORMATION OF ANY KIND

Virtual Tour: _____

Additional Virtual Tour: _____

INTERNET DISPLAY

NOTE: IF NO IS SELECTED FOR THE FIELD INTERNET DISPLAY, THEN THE OTHER FIELDS WILL BE AUTO POPULATED WITH NO

Internet Display: (Y/N)

☐ Yes
☐ No

**Address Display: (Y/N)
(Req'd if Internet Display = Y)**

☐ Yes
☐ No

**Comments/Reviews: (Y/N)
(Req'd if Internet Display = Y)**

☐ Yes
☐ No

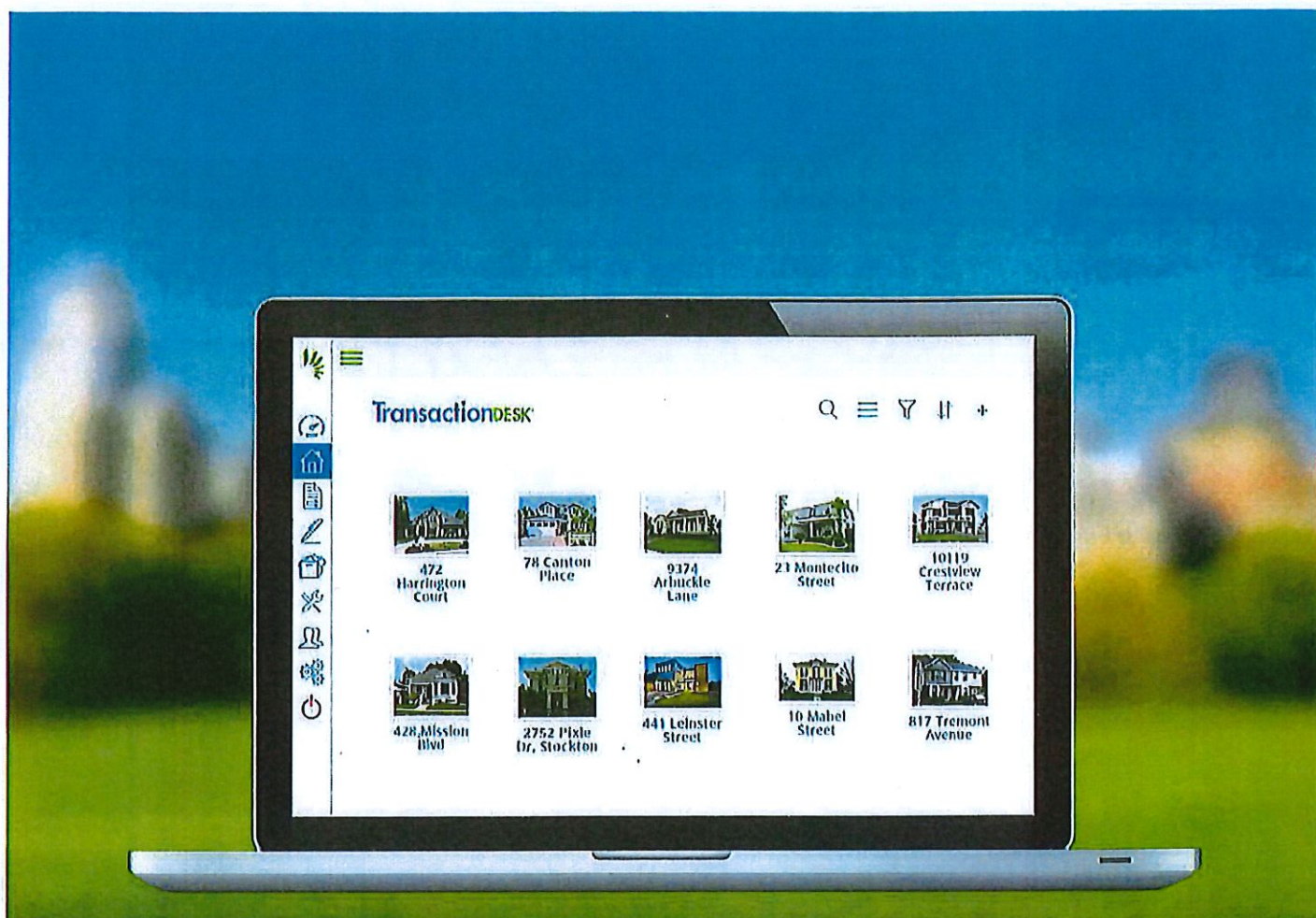
**AVM: (Y/N) (Req'd if
Internet Display = Y)**

☐ Yes
☐ No

SIGNATURES

Seller: _____ **Seller:** _____ **Date:** _____

Agent: _____ **Co-Agent:** _____ **Date:** _____



TransactionDESK®

The Complete Transaction Management Solution

Reporting and file management

View and access all the listing, sale and lease files in your office.

File review compliance management

Define what documents you require for each transaction type. Brokerage staff can quickly and easily review files online, from any computer with web access.

Agent and Broker Dashboards

Now agents and brokers can create and maintain their

own custom dashboards. Users can drag and drop widgets to their dashboard enabling quick access and easy monitoring of their transactions

Save money, go paperless

Save on printing consumables, storage, staff time, telecommunications cost, etc.

Brokerage branding

All emails, faxes and the Customer Service Portal are branded



Toll Free Live Support: 800-668-8768 • www.instanetsolutions.com • Email: sales@instanetsolutions.com for more info



Only TransactionDesk Gives You All These Features in One Easy Platform.

Feature	Description	Compare	Compare
Available Everywhere on Anything	Works on all commonly used devices and browsers - PCs, Macs tablets and smartphones. No apps required.		
Online forms and Contracts	Includes InstantForms, a full featured online forms application		
Unlimited Document/ File Storage	Unlimited document storage for listing, sale and lease files - Save signed forms & third party documents in transaction files		
Complete Document Management Solution	Create an unlimited number of custom folders for storage of non-transaction related business documents and files.		
Load Documents Easily	Via email, upload, fax, virtual printer		
Complete PDF Management	Merge docs, split up docs, markup, convert other files to PDFs, etc.		
Email and Fax Documents from System	Creates record of all documents sent in transaction history. Unlimited toll free faxing in US and Canada		
Team Friendly	Share transactions and other folders/documents. Team can collaborate on transactions with appropriate permissions for each team member.		
Agent Dashboard	Enables Agents to view realtime activity regarding all of their transactions. Agents can select from a library of smart widgets to customize their dashboard to meet their needs.		
Tasks and Activity Plans	Manage all activities of your transactions and your business using the online checklists.		
Appointment and Calendar	Track all your appointments for your transactions and other business.		
Automated Reminder	Automated email reminders for both tasks and appointments ensures you won't miss a thing.		
Collaboration Tools	The branded Customer Service Portal allows agents to securely share documents and other information with clients 24/7/365.		
Service Ordering	Saves time by automatically collecting file information such as vendor contact info, property address, buyer/seller names, etc.		

Continued on next page...

Feature	Description	Compare	Compare
Templates	Saves time and effort. Set-up the system once and let the system do the work for you. Templates for forms, documents, checklists and transactions.		
Branded	All communications and anything a client or third party can see is branded - emails, faxes, etc.		
Audit Trails and Logging	Tracks all activities and creates an audit trail in each transaction file automatically - "The Paperless Paper Trail"		
Authenticate Digital Signatures	Optional e-signature module is fully integrated making TransactionDesk the most complete paperless transaction platform in the industry.		
Long Term Data and Document Retention	All transactions, data and documents are kept for (at least) the legal retention period in your state at no extra charge.		
Data and Document Security/Safety	Everything is replicated to multiple datacenters. Digital certificates are applied to documents to detect tampering when out of system.		
Brokerage Features			
Broker Compliance and File Management	Document checklists, automated audit trail creation, online file management & collaboration. Easily perform file review online, from any computer. Reduce legal exposure, easily making sure all files are complete.		
Reporting	Easily find transactions and documents in your office or company, whether they are active/pending deals or ones that closed years prior.		
Custom System Configuration and Set-up	Flexible system works the way you work. Brokerage staff can define templates and branding that applies to all agents in the office and/or company.		
Brokerage Branding	Ensures your company's value is recognized by your agents and clients.		
Back Office Accounting System Integration	Reduce redundant data entry - Import transaction data into popular brokerage back office systems.		
Broker Dashboard	Enables Brokers to view live real-time activity across their entire office. Broker can select from a library of Smart widgets to modify their dashboard to meet their needs.		

Sign up for FREE training at
www.InstanetSolutions.com/transactiondesk/webinars



Toll Free Live Support: 800-668-8768 • www.InstanetSolutions.com • Email: sales@instanetsolutions.com for more info

WMLS Technical Help

- CoreLogic's Matrix AnswerLink Support:

844-209-0140

- 8:30am-8:30pm (Mon – Fri)
- 8:30am-3:30pm (Sat & Sun)

- **Matrix Help Tab** - User Guides, "Learning Lab", manuals and tutorials that answer most frequently asked questions.
- **Matrix External Links** – WAAR Website, Open House map & schedule, county/city tax records, WMLS Rules and Regulations, Transaction Desk, RPR, SentiLock, NAR, VR, etc.
- Transaction Desk: **1-800-668-8768 (24/7)**
- SentiLock: **1-513-618-5800 (Lockbox Support)**
1-513-618-5814 (Showing Support)

- **WMLS Administrator Contact information:**

Darragh Cutshaw

MLS Operations Manager

Williamsburg Area Association of Realtors®

5000 New Point Rd. Suite 1101

Williamsburg, VA 23188

Tel: (757) 253-0028 Direct: (757) 903-4015

Fax: (757) 253-1559

Darragh@WAARRealtor.com