

## Create a Form

### Summary

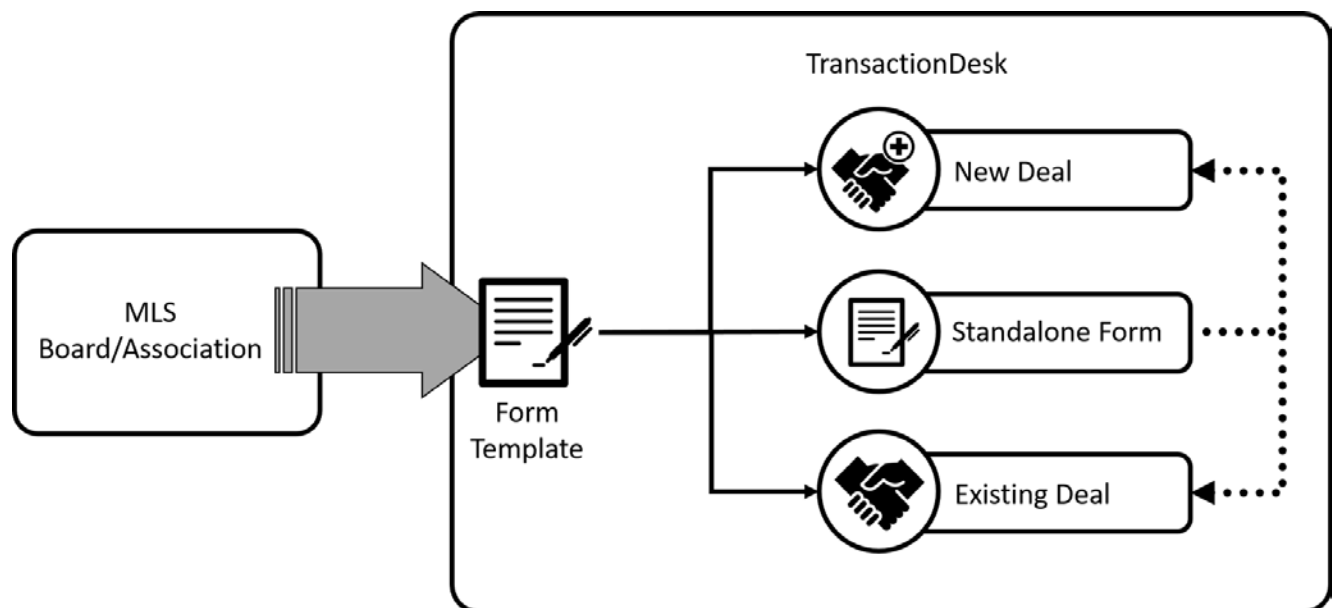
Describes how to create a form in InstantForms.

### Context

Create a form when you need an interactive, digital, legal document provided by your board to conduct your business.


You can create forms out of the existing form templates downloaded from your board, and add them to transactions. For example, you can create an agreement of purchase and sale form out of your agreement of purchase and sale form template and add it to your deal for 429 Main Street.

You can also create standalone forms out of a form template if you have a form that is not immediately associated with a deal, such as a buyer representation agreement form. You can then associate the created buyer representation agreement form with a particular deal later on, if the situation arises.



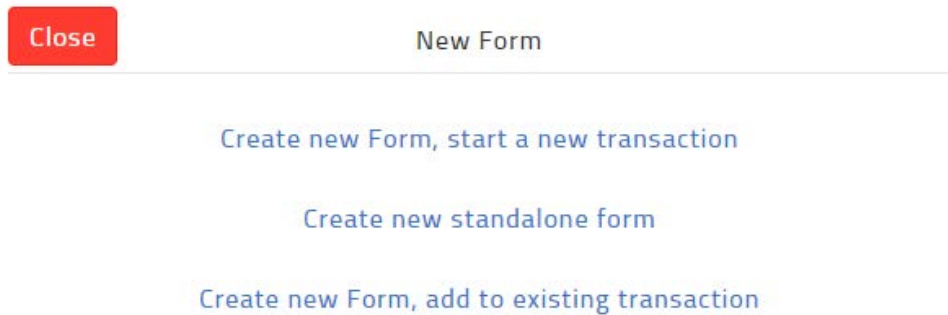
### Steps

#### Create a Standalone Form

1. Locate the form you need to create, such as a buyer representation agreement.
2. Use the more options menu  to select **New**.



The New Form window opens.




3. Click **Create new standalone form**.

The selected form opens in the form editor.

4. Use the available form editor options to pre-populate your form's fields with information. See *"Edit a Form"* for more information on each form editor option.
5. When you are finished setting up your form, in the form editor options, do one of the following:

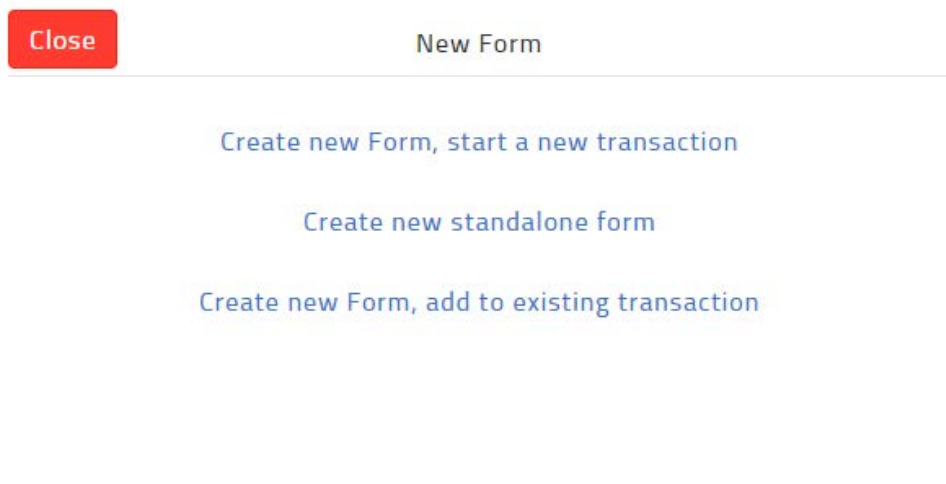
- Navigate to **File > Save** if you need to save the form to the list of forms.
- Navigate to **File > Copy** if you need to copy the form.
- Navigate to **File > Print** if you need to print the form.
- Navigate to **File > Send > Email** if you need to send the form as part of a TransactionDesk email. See *"Email a Form"* for more information.
- Navigate to **File > Send > Fax** if you need to send the form as part of a TransactionDesk fax. See *"Fax a Form"* for more information.
- Navigate to **File > Send > DocBox** if you need to save the form to a DocBox folder.
- Navigate to **File > Send > Markup in DocBox** if you need to mark up the form. See *"Mark Up a Document"* for more information.
- Navigate to **Transaction > Add to** to add the form to an existing transaction.
- Navigate to **Transaction > Start New** to add the form to a new transaction.
- Navigate to **Sign** to sign the form in Authentisign.

## Create a Form and Add it to a New Transaction

1. Locate the form you need to create, such as an agreement of purchase and sale.
2. Use the more options menu  to select **New**.



The New Form window opens.



Close

New Form

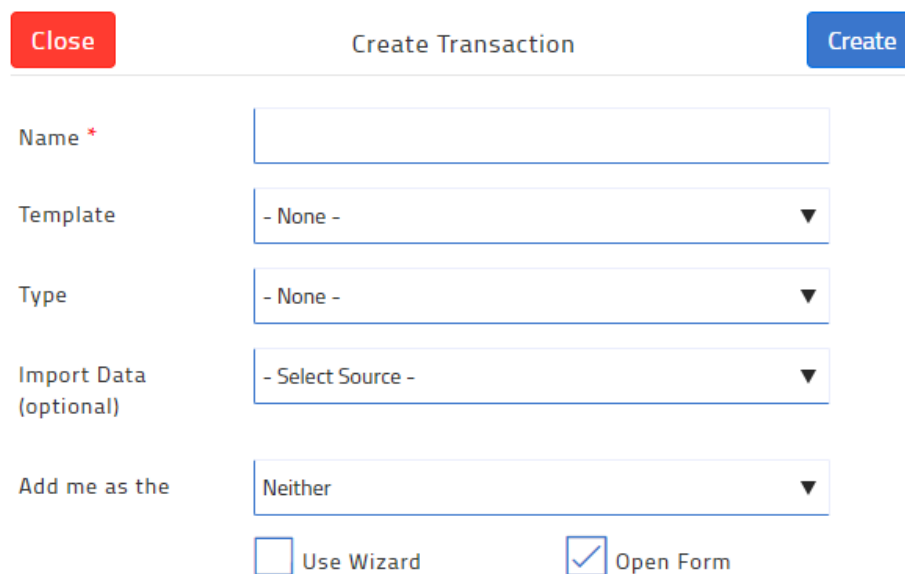
Create new Form, start a new transaction

Create new standalone form

Create new Form, add to existing transaction

- Click **Create new Form, start a new transaction**.

The Create Transaction window opens.



Close

Create Transaction

Create

Name \*

Template

Type

Import Data (optional)

Add me as the

☐ Use Wizard ☒ Open Form

- In the **Name** field, enter a name for the transaction. Typically, this is the street address of the property.
- Optional: Use the **Template** dropdown to select the appropriate template to automatically add a checklist, forms, and documents. If you have not yet created any templates, the option is not available. Consider creating a template first.

6. Optional: Use the **Import Data** dropdown to select the MLS listing as a source of information for the transaction. Additional fields appear.

Import Data  
(optional)

Georgia MLS ▼

Single Family Detached ▼

MLS Number

7. Do the following:
- Use the dropdown to select the type of property.
  - In the **MLS Number** field, specify the MLS number of the listing.
8. Optional: Use the **Add me as the** dropdown to select your role in the transaction. Choose from Listing Agent, Selling Agent, Neither, or Both. Click **Create**.

The selected form opens in the form editor.

The screenshot shows the form editor interface. At the top is a toolbar with icons for a menu, folder, text formatting (AA), drawing, home, insert, zoom, and edit. The form content is as follows:

**ADDENDUM TO PURCHASE AGREEMENT**


In reference to Purchase Agreement between \_\_\_\_\_ the  
Buyer, and \_\_\_\_\_, the Seller, and dated  
\_\_\_\_\_, covering the real estate property commonly known as:  
\_\_\_\_\_  
Subject property address \_\_\_\_\_

THE UNDERSIGNED BUYER AND SELLER HEREBY AGREE TO THE FOLLOWING:

9. Use the available form editor options to pre-populate your form's fields with information. See *"Edit a Form"* for more information on each form editor option.
10. When you are finished setting up your form, in the form editor options, do one of the following:
- Navigate to **File > Save** if you need to save the form to the list of forms.
  - Navigate to **File > Copy** if you need to copy the form.
  - Navigate to **File > Print** if you need to print the form.
  - Navigate to **File > Send > Email** if you need to send the form as part of a TransactionDesk email. See: **Email a Form** for more information.
  - Navigate to **File > Send > Fax** if you need to send the form as part of a TransactionDesk fax. See *"Fax a Form"* for more information.

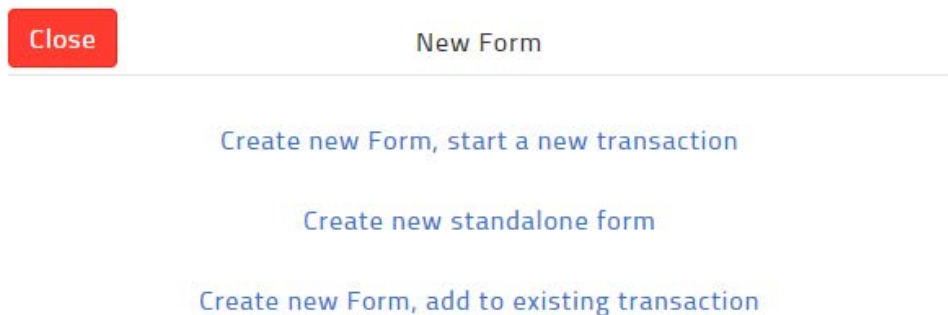
- Navigate to **File > Send > DocBox** if you need to save the form to a DocBox folder.
- Navigate to **File > Send > Markup in DocBox** if you need to mark up the form. See *“Mark Up a Document”* for more information.
- Navigate to **Transaction > Add to** to add the form to an existing transaction.
- Navigate to **Transaction > Start New** to add the form to a new transaction.
- Navigate to **Sign** to sign the form in Authentisign.

## Create a Form and Add it to an Existing Transaction

1. Locate the form you need to create, such as an agreement of purchase and sale.
2. Use the more options menu  to select **New**.

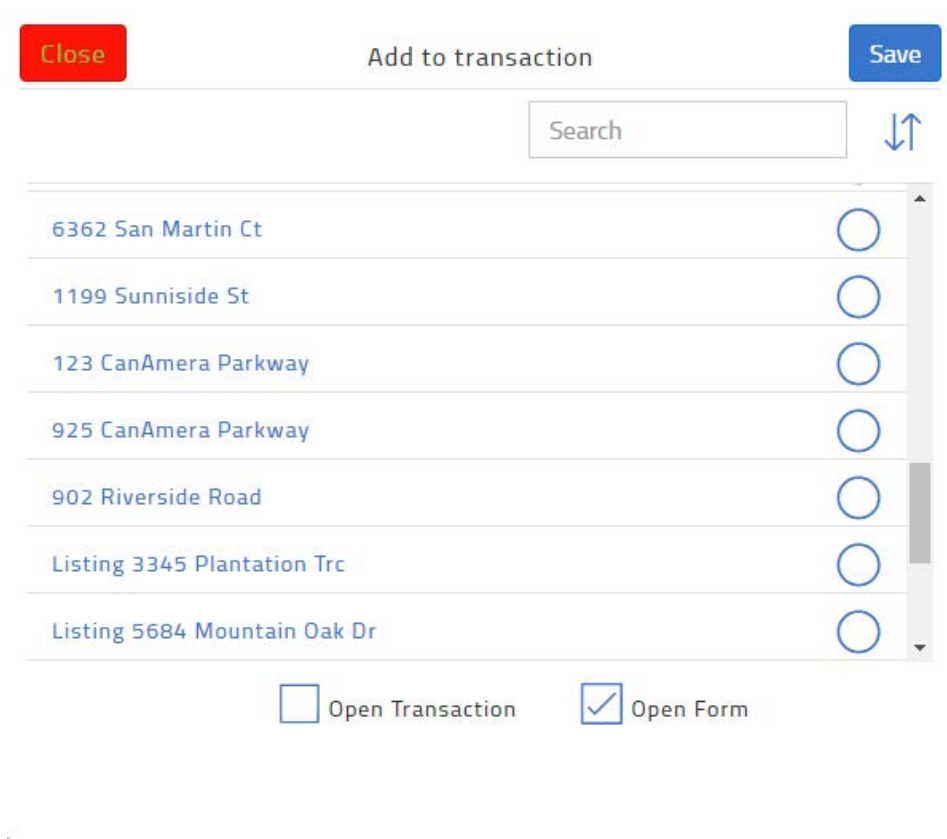


The New Form window opens.



3. Click **Create new Form, add to existing transaction**.

The Add to transaction window opens.



Close Add to transaction Save

Search

6362 San Martin Ct

1199 Sunnyside St

123 CanAmera Parkway

925 CanAmera Parkway

902 Riverside Road

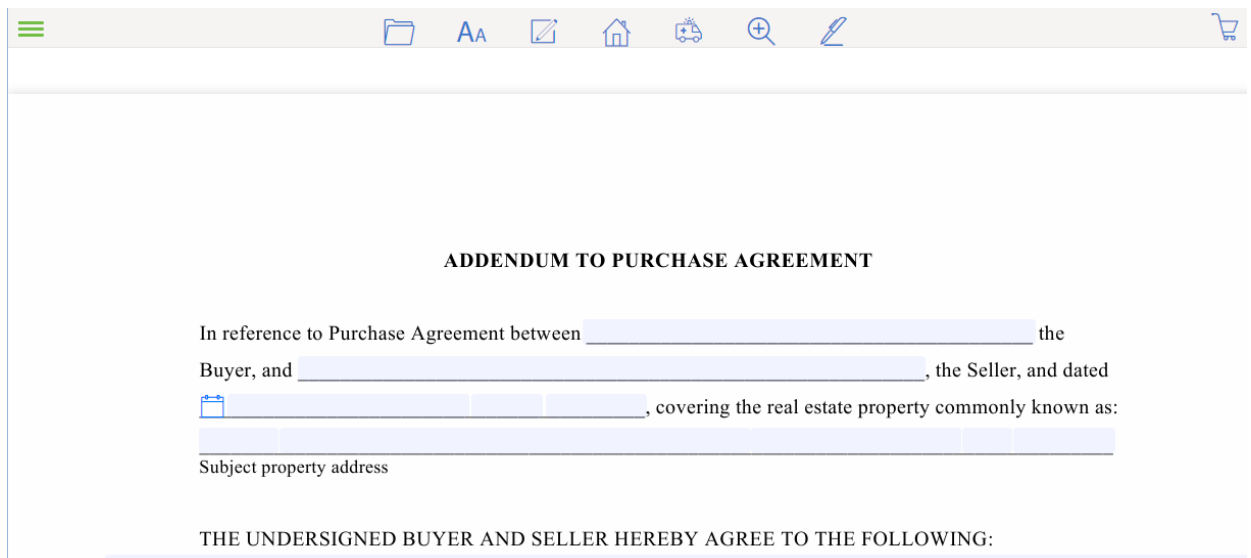
Listing 3345 Plantation Trc

Listing 5684 Mountain Oak Dr

☐ Open Transaction ☒ Open Form

4. Check the transaction you need to add the form to, and click **Save**.

The selected form opens in the form editor.



ADDENDUM TO PURCHASE AGREEMENT

In reference to Purchase Agreement between \_\_\_\_\_ the Buyer, and \_\_\_\_\_, the Seller, and dated \_\_\_\_\_, covering the real estate property commonly known as: \_\_\_\_\_ Subject property address

THE UNDERSIGNED BUYER AND SELLER HEREBY AGREE TO THE FOLLOWING:

5. Use the available form editor options to pre-populate your form's fields with information. See *"Edit a Form"* for more information on each form editor option.
6. When you are finished setting up your form, in the form editor options, do one of the following:

- Navigate to **File > Save** if you need to save the form to the list of forms.
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- Navigate to **File > Print** if you need to print the form.
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