

# loadingDOCS Clipboard

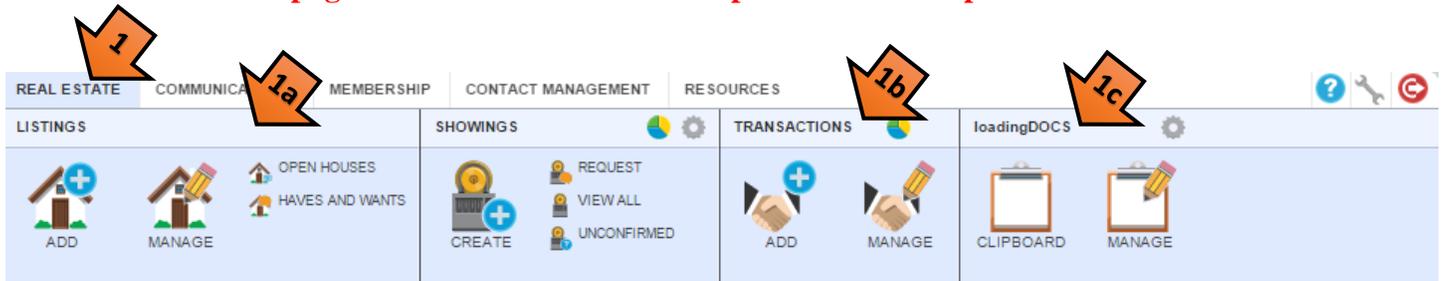
1. Within the real estate tab, there are 3 main areas that you're going to use:
  - a. The Listings Section
  - b. The Transactions section
  - c. And the loadingDOCS section

loadingDOCS is an online document management system for all your documents and tasks associated with each property you list or sell. Documents can be sent into the system using your loadingDOCS email or you can directly upload them to the clipboard. The following restrictions apply to all documents sent to your clipboard:

- Documents MUST be PDF's
- Documents cannot exceed 10MB each when emailed or 20MB each when uploading directly
- You can attach a maximum of 5 documents per email. More than one email can be sent
- PDF's not moved to a listing or sale will be deleted from your clipboard after 90 days

2. Click the [NEW - Email Documents] button to display the list of restrictions
  - a. Your unique email address for emailing documents to your clipboard is displayed here as well (username@cbdai0.LoadingDOCS.com)

**Please make sure the document is scanned as a pdf with all pages in order and facing right side up. You CANNOT rotate the pages AFTER the document is uploaded to the clipboard.**



## Admin Management

Search by Transaction, Listing Number or Address

Type:

Office:

Status:

Agent:

Document Status:  
 All  No File  
 Overdue  Incomplete  
 Not Yet Approved  Complete  
 Not Submitted

Transaction #	Address
Pending	123 Fake S
Pending	12345 Fake
Pending	12345 Fake

**Want the ability to email to your loadingDOCS clipboard?**

Share the loadingDOCS email address below with your contacts including Buyers, Sellers, Lawyers, and Outside Brokers. They can email PDF documents to this email address and the documents will be automatically uploaded to your loadingDOCS Clipboard! You can also email PDF documents to your own loadingDOCS email address.

Your loadingDOCS email address:

Tips:

- Emails must have a PDF attached
- Each PDF must be smaller than 10MB
- Only attach up to five PDFs per email

Clipboard:

- Listing Agreement
- P-n- S Followup Addenda
- P-n- S Form 17

**\*\* NEW BETA UPLOAD \*\* 2 minute Video**

PDF's can be uploaded to your clipboard directly from your computer or emailed in.

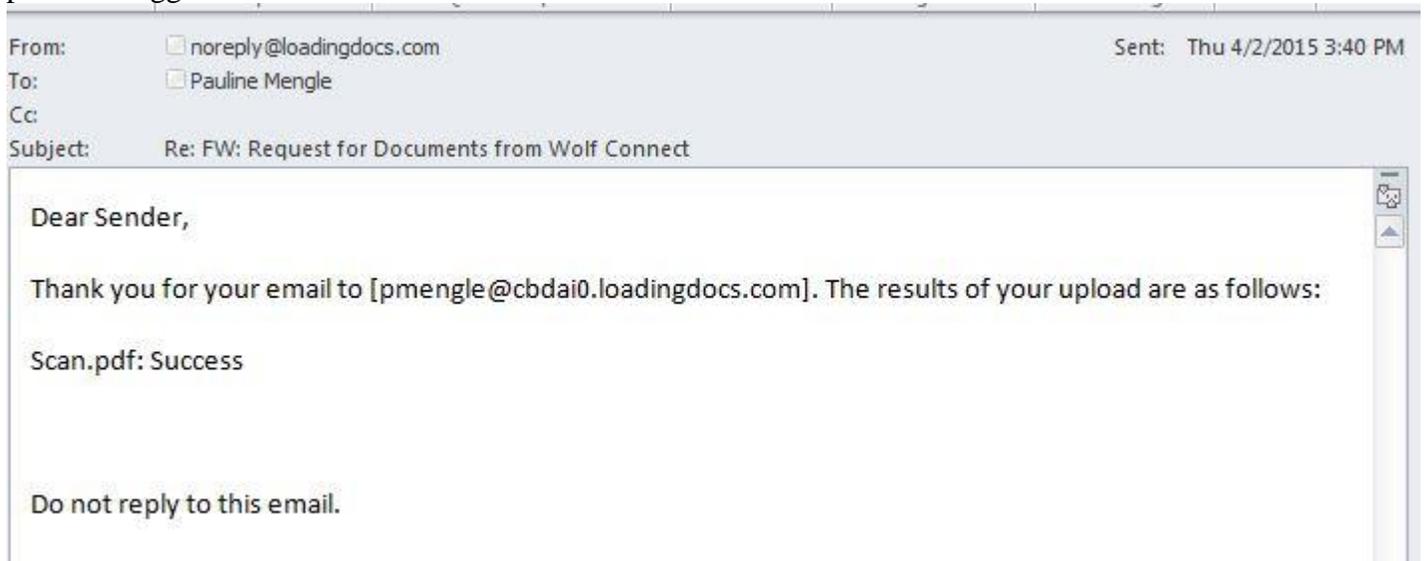
### **Emailing PDF's to your clipboard**

Please add your LoadingDOCS email address (username@cbdai0.LoadingDOCS.com) to your:

- Contacts in NWMLS Transaction Desk
- Address book/Contacts in your email programs
- Address book/Contacts in your smart phone

You can quickly cc LoadingDOCS when sending any completed documents to the other brokers and clients. You can also forward complete documents received via email to LoadingDOCS. These two simple steps will save you a lot of time. If you do these two things as you send and receive messages throughout the day, whenever you go into LoadingDOCS all of your documents will already be on your clipboard!

The loadingDOCS server will send you an email notifying you as to the success or failure of the email. If the email indicates that the delivery was unsuccessful, check to make sure that only pdf's are attached and that each pdf is no bigger than 10MB and there are no more than 5 attachments on the email.

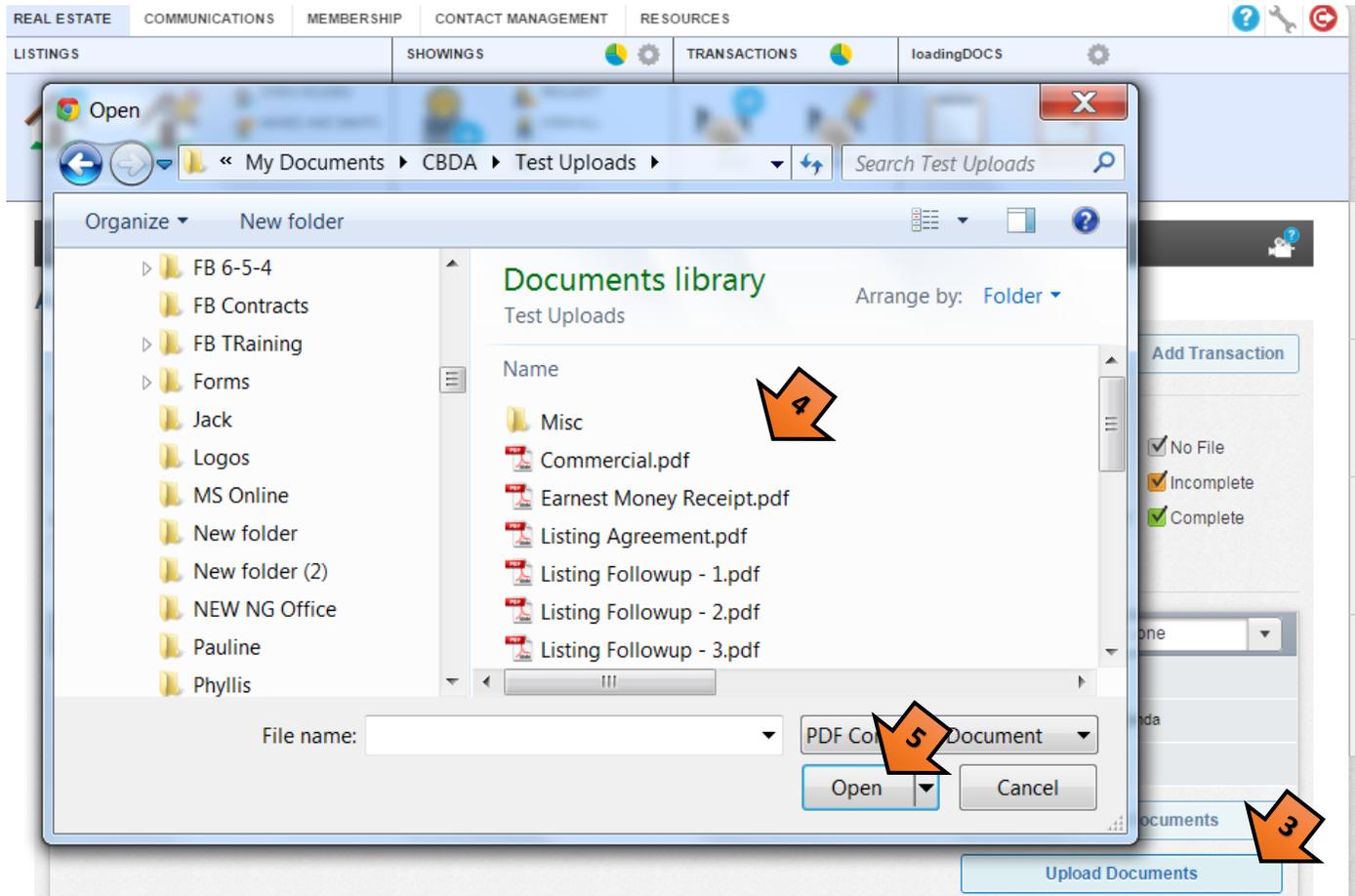


**NOTE:** If you have a slow internet connection it may take several minutes for your computer to deliver the email to LoadingDOCS but once they receive the email it only takes a minute or two for the PDF's to reach your clipboard. Press [F5] key to refresh your clipboard after a couple of minutes and your PDF's should be displayed.

### Uploading PDF's directly to your clipboard

3. Click the upload documents button;
4. Browse your computer for PDF's, if you are uploading more than one, hold "CTRL" while left clicking each to select multiple PDF's.
5. Click the "Open" button to add them to your loadingDOCS clipboard

NOTE: Documents that have been added to your clipboard will then need to be attached to the specific listing or transaction (sale) to which they pertain. Only documents that have been attached to the appropriate listing or sale will be submitted to the Transaction Center.



6. From the loadingDOCS manage section you can see and edit all of your Listings or Transactions
7. Select Listing or Transactions
8. You can filter by Listing/Sale Status
9. You can filter by Document Status – Below the statuses are described
  - a. All = ANY document status
  - b. **RED** = State required document past due
  - c. **YELLOW** = Document awaiting review by staff
  - d. **BLUE** = Broker hit SAVE vs SUBMIT when adding PDF to document folder and the PDF has not be sent to the transaction center. You will have to do a status change in order to submit this PDF to the transaction center. Click on the [Status Change] button and then click on the [Submit] button.
  - e. NO FILE = Folder has no PDF in it
  - f. **ORANGE** = PDF reviewed, addition info. required – see status change note OR review email
  - g. **GREEN** = PDF Reviewed and Accepted

There are 2 other buttons available in the Manage section of LoadingDOCS

10. [Add listing] Only use for Unpublished listing, other NWMLS listings are added each morning at 8am

11. [Add Transaction] will take you to a new sale Transaction Guide

