



**New Toolbar  
Enhancements  
User Guide**



# **InstanetForms**

## New Toolbar User Guide

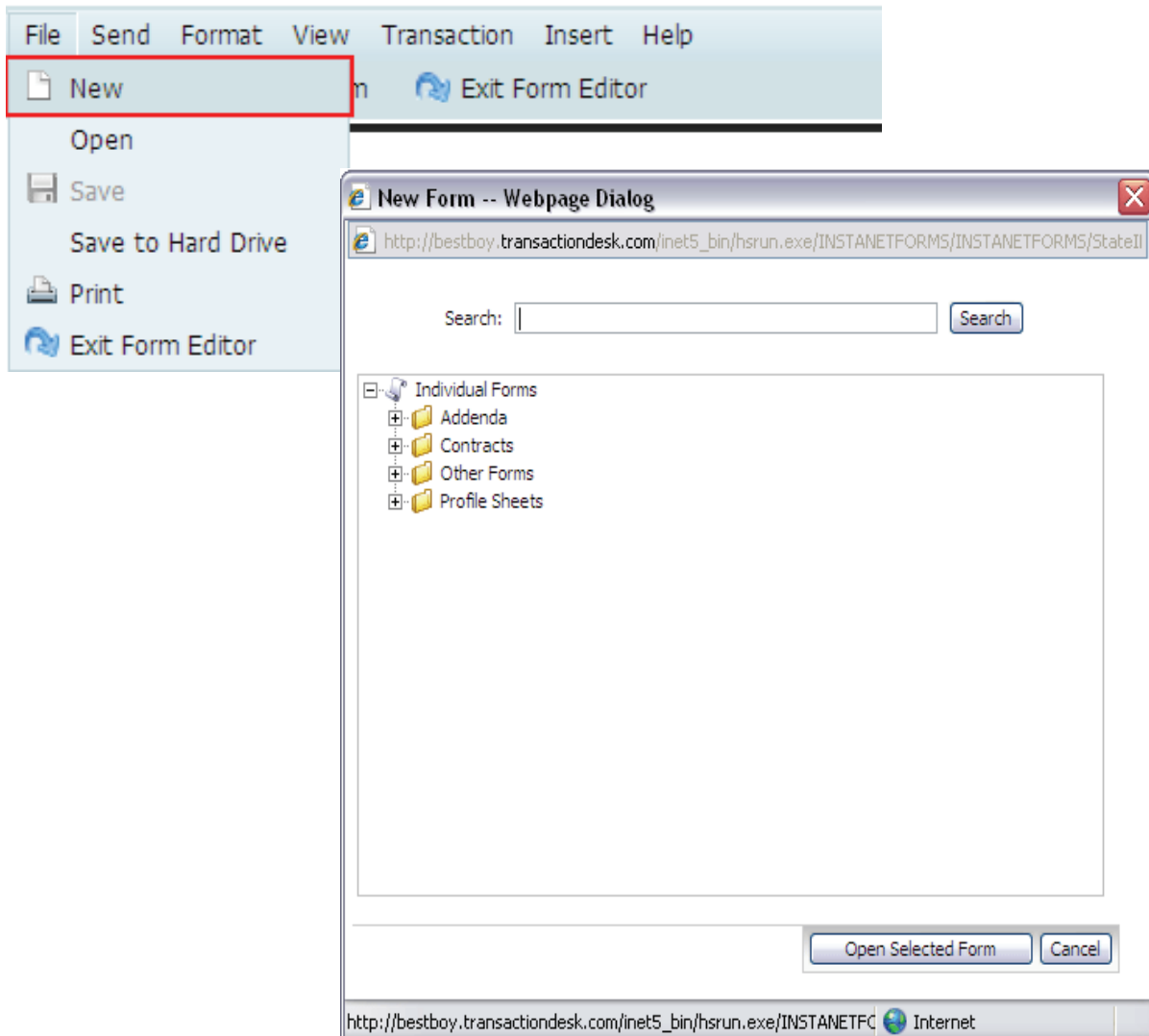
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New

## File >> New

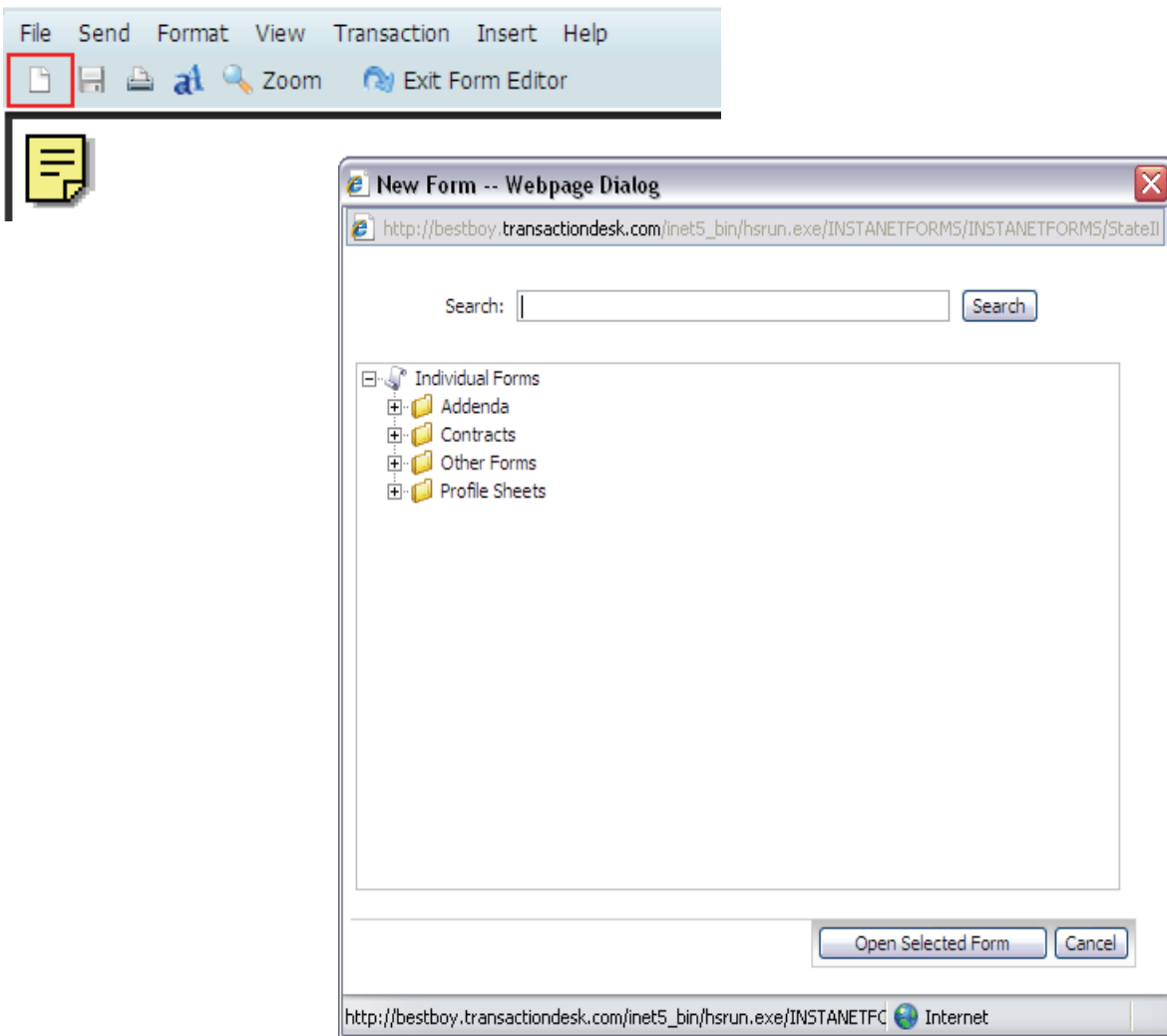
- Clicking on “New” opens pop-up box.
  - User may search & select new forms to add to the transaction.



New

## File >> New

- Clicking on “New” icon opens pop-up box.
  - User may search & select new forms to add to the transaction.



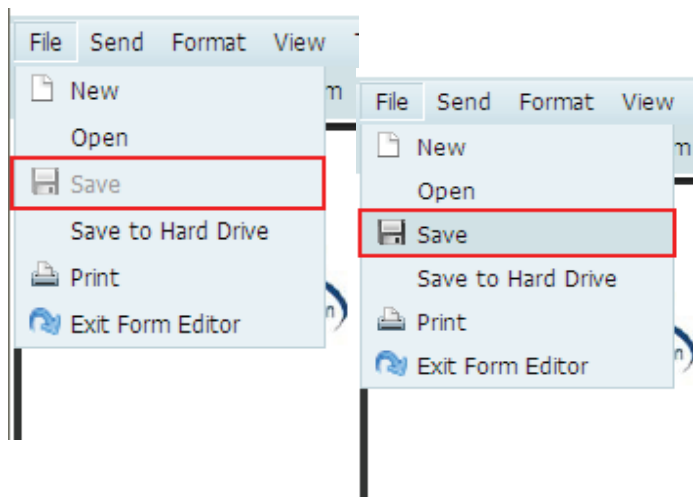
New

## File >> Save

- There are 3 ways to save your form.

1. Save from the menu.
2. 'Save' is also available from the icon toolbar.

**Note:** The 'Save' selection is only activated if a change has been made to the selected form. The user must move the cursor to another field.



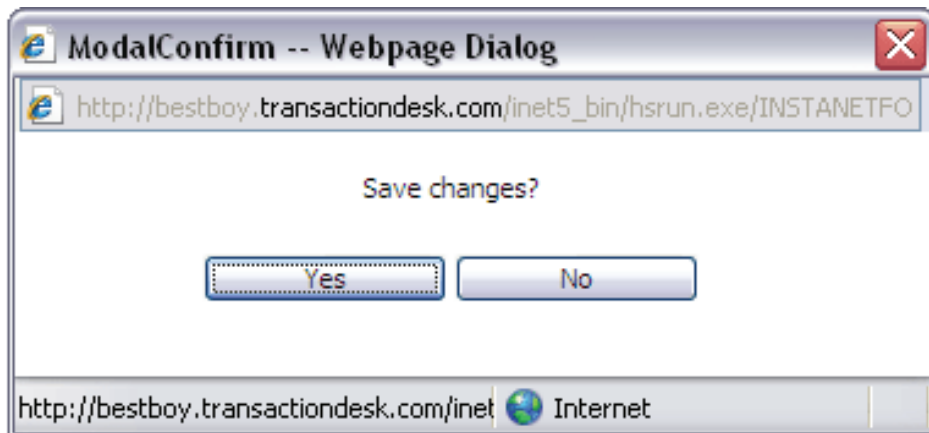
New

## **File >> Save**

### **3. Pop-up window: Save changes?**

- If the user forgets to click “Save” a pop-up window appears when the user goes to another screen.

**Note:** This window only appears if a change has been made to the form.

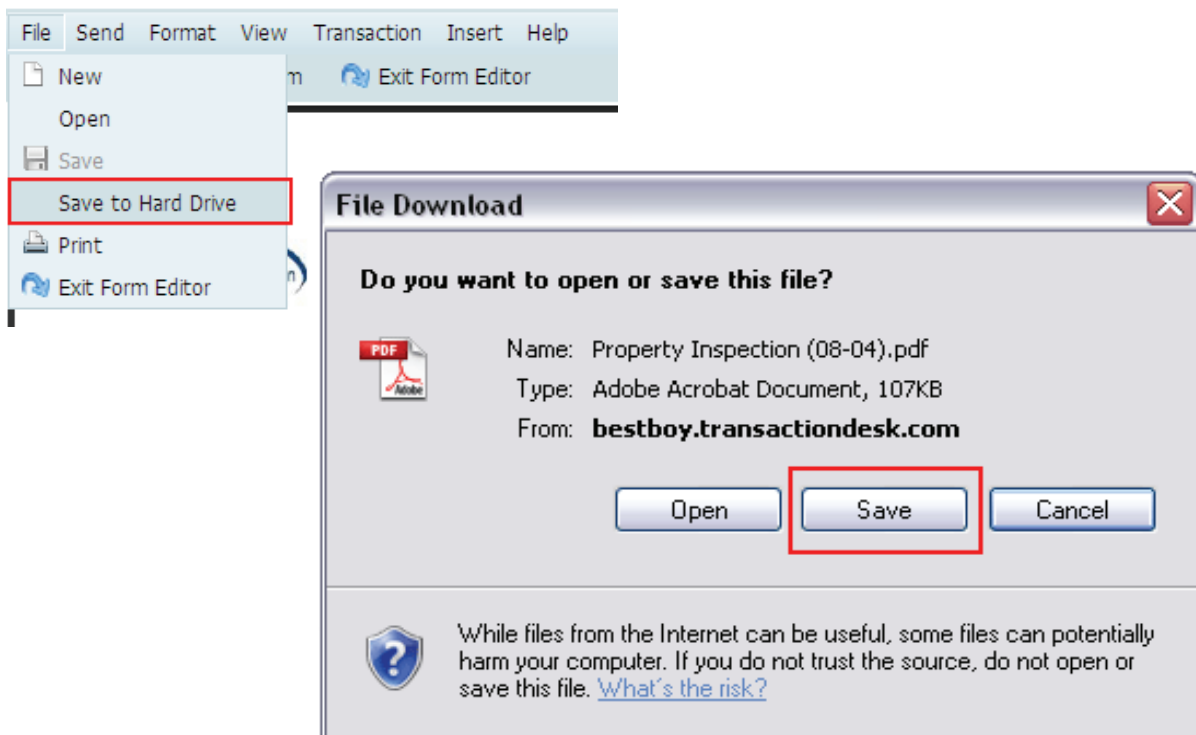


New

## File >> Save To Hard Drive

'Save to Hard Drive' downloads the form to the user's hard drive.

- A pop-up appears asking the user whether to Open, Save or Cancel the file.
  - Click the 'Save' button.

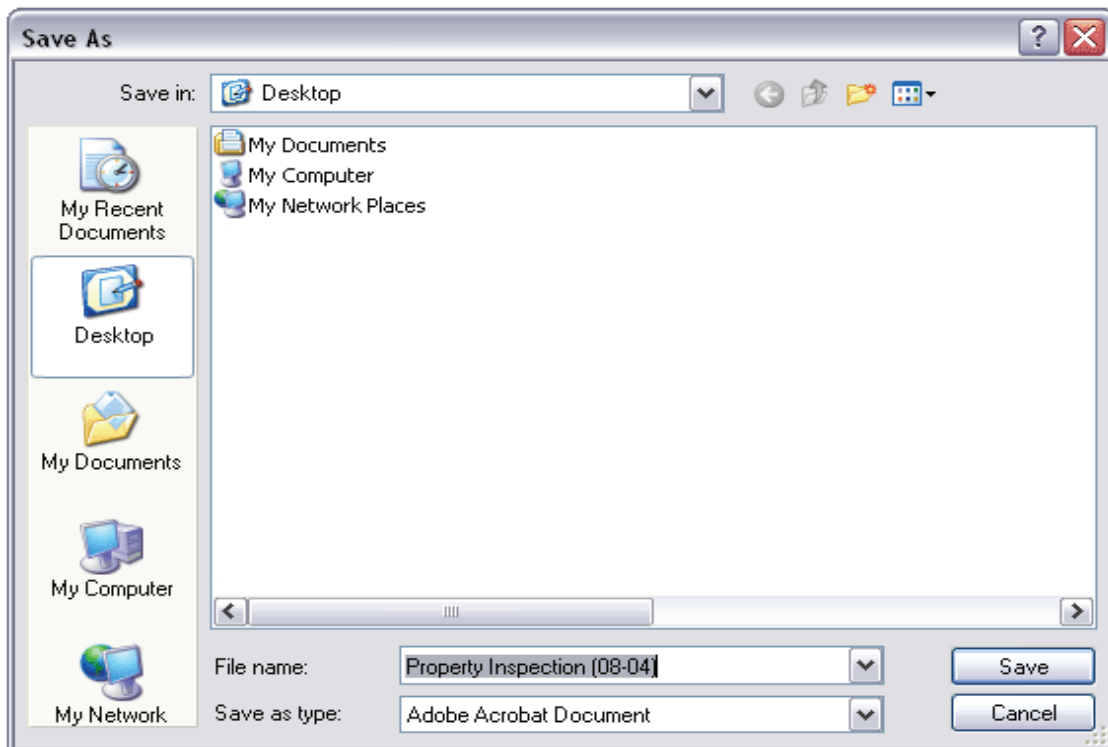


New

## File >> Save To Hard Drive

'Save to Hard Drive' downloads the form to the user's hard drive.

- Another popup then asks where to save the file.
- Browse to the location you wish to save and click 'Save'.

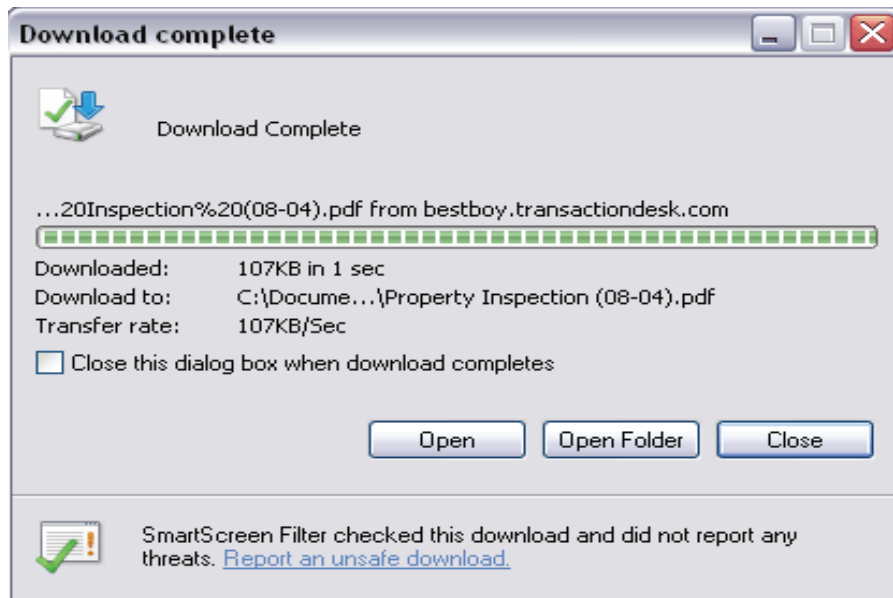


New

## File >> Save To Hard Drive

'Save to Hard Drive' downloads the form to the user's hard drive.

- When the download is complete click the 'Close' button.
- The file is now saved to your computer.

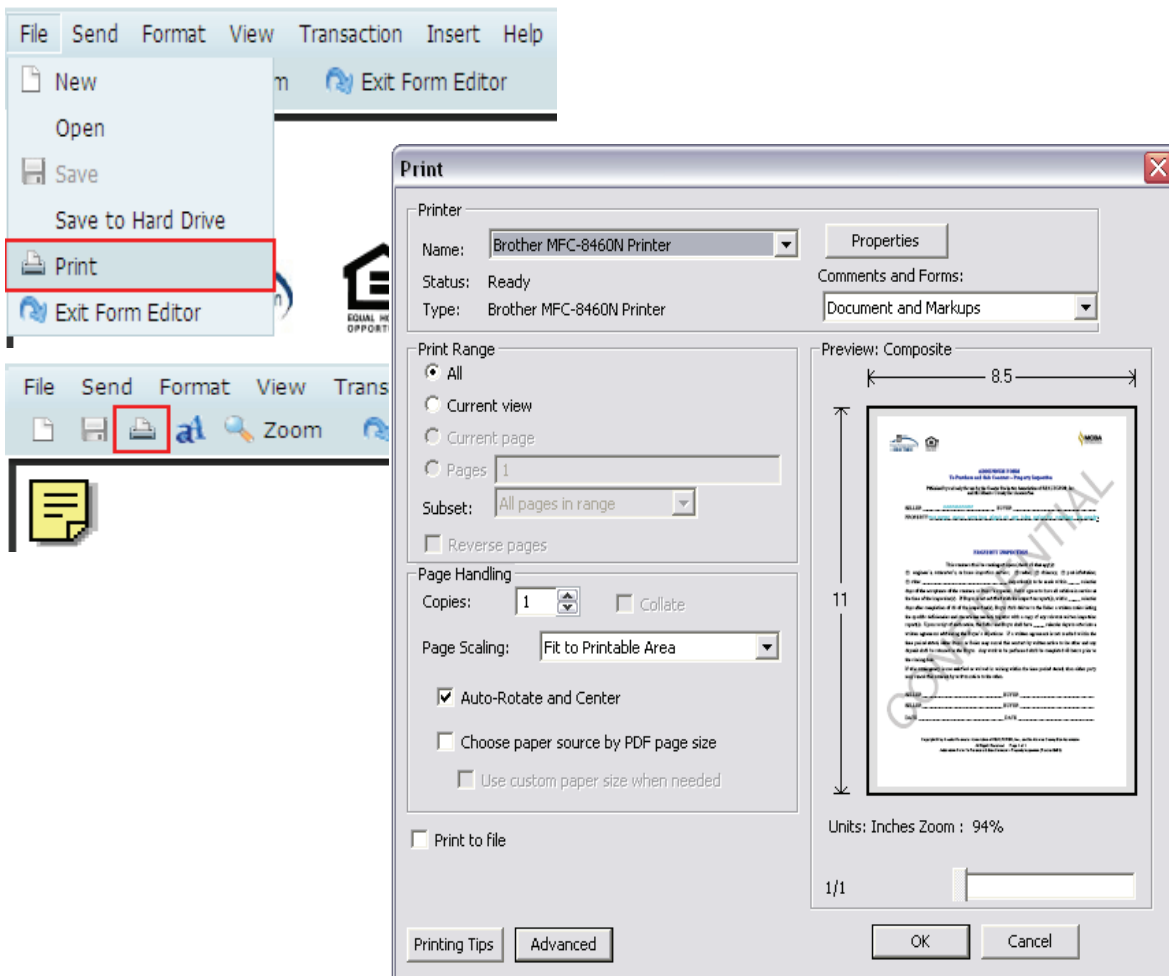


New

## File >> Print

'Print' prints the selected form.

- Available from the menu or the icon toolbar.

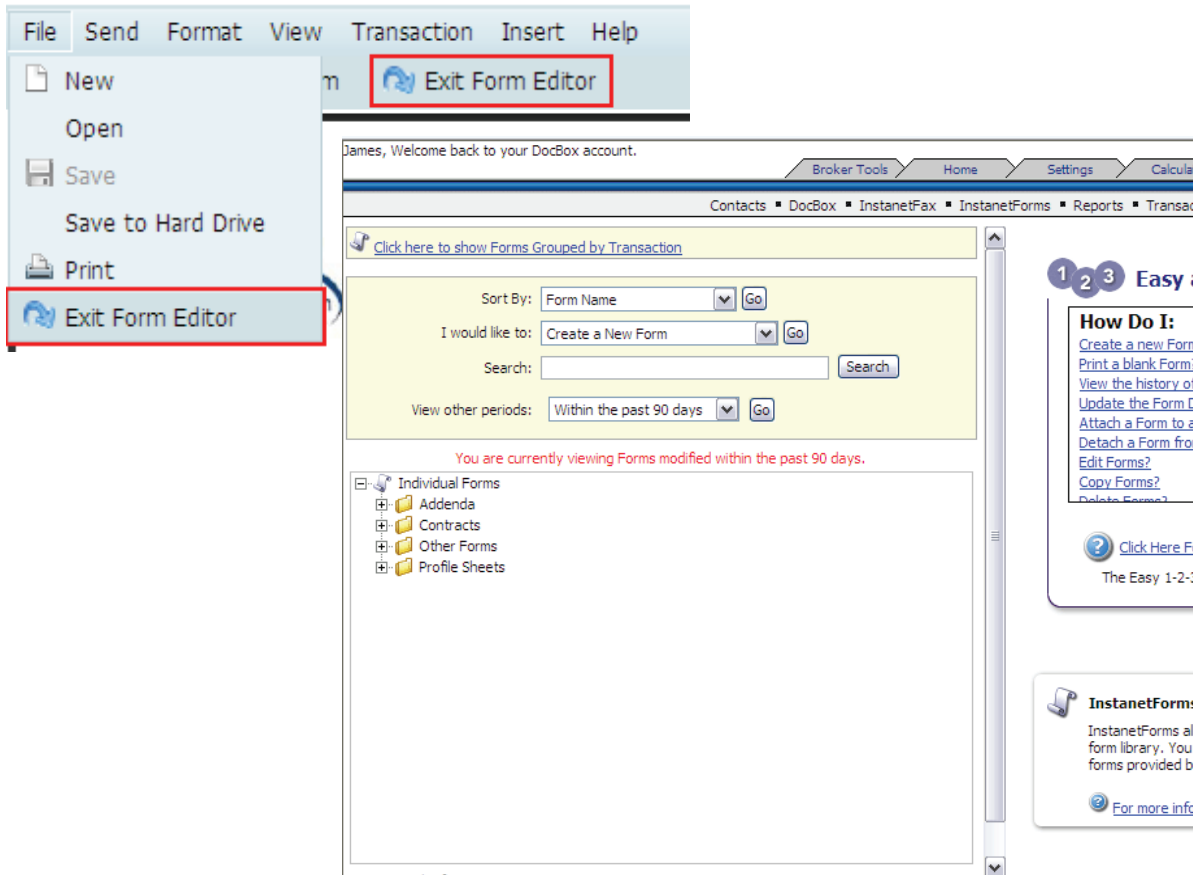


New

## File >> Exit Form Editor

'Exit Form Editor' is available in both the toolbar and the icon toolbar.

- Clicking on it returns the user to the previous page.

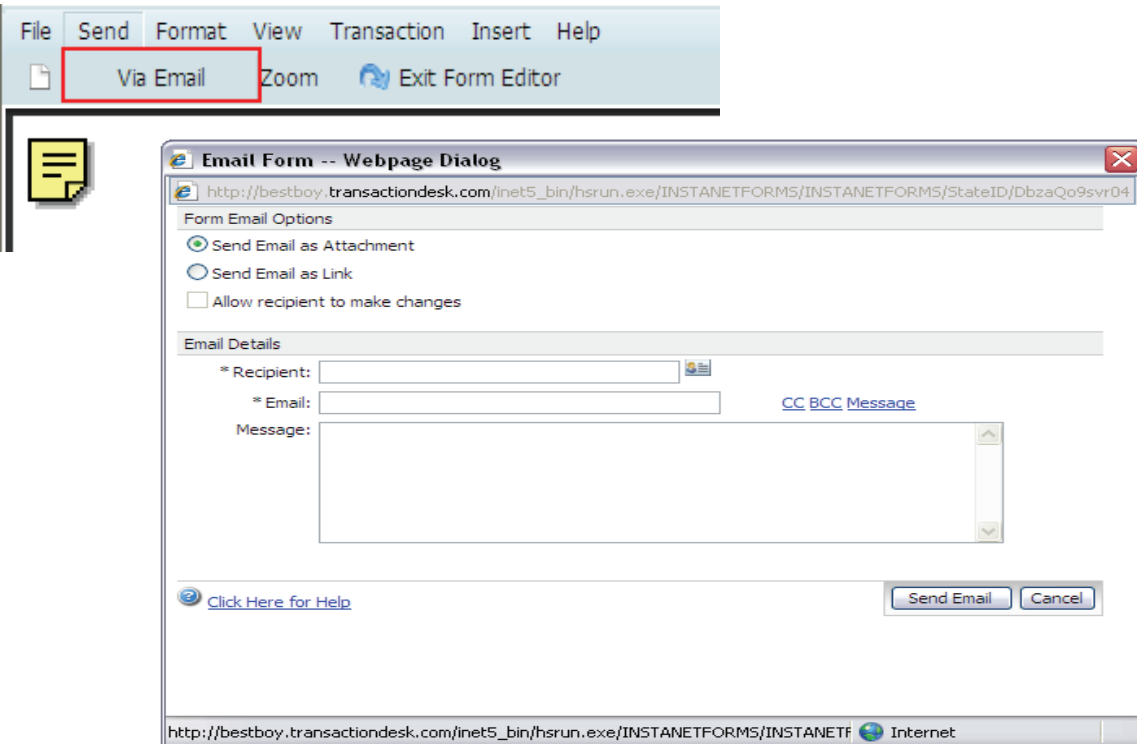


New

## Send >> Via Email

'Via Email' emails the form in the editing screen.

**Note:** There are different emailing options.



New

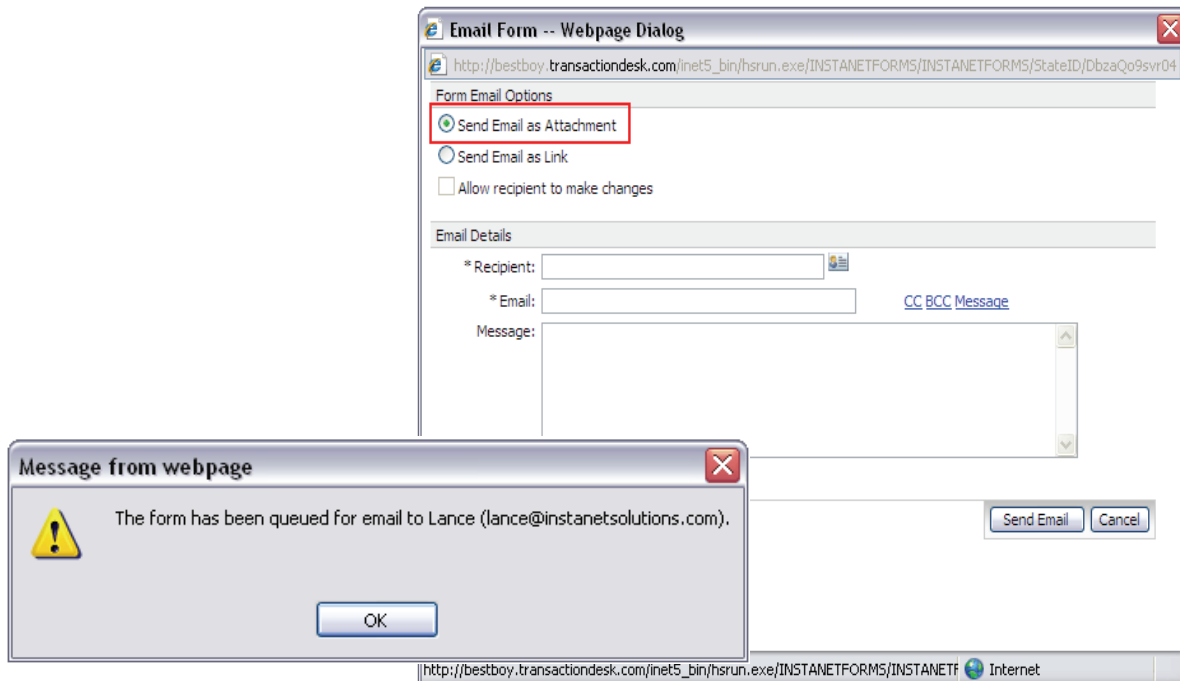
## Send >> Via Email

'Via Email' emails the form in the editing screen.

'Send Email as Attachment'.

### Includes the form as a PDF attachment

- Enter the recipient's name and email address
- Add a message
- Click "Send Email"
- A pop-up screen appears confirming the email.
- Click the "OK" button.



New

## Send >> Via Email

'Via Email' emails the form in the editing screen.

- Sample Email.

[9] - Property Inspection (08-04).pdf (103 KB)

### DocBox( Documents )

**Attention: Lance Campbell**

You have been sent Documents from:

Name: **Nicholas Adams**

Company: **Greater Rochester Association of REALTORS**

Phone: **519-432-9115**

Fax: **519-432-6515**

Email: [nick@instanetsolutions.com](mailto:nick@instanetsolutions.com)

**Instructions:**

To print a copy of the Documents:

1. Double click on the attached document.
2. Select **Print** from the menu.

To save the file to your computer:

1. Right click on attached document.
2. Click **Save As** on the popup menu.
3. Select the location and click the **Save** button.

**Additional Details:**

This email has 1 attachments.



**Nicholas Adams**

Agency: Greater Rochester Association of REALTORS

Address: 930 East Avenue  
Rochester, NY 14607

Phone: 519-432-9115

Fax: 519-432-6515

Email: [nick@instanetsolutions.com](mailto:nick@instanetsolutions.com)

Website:

New

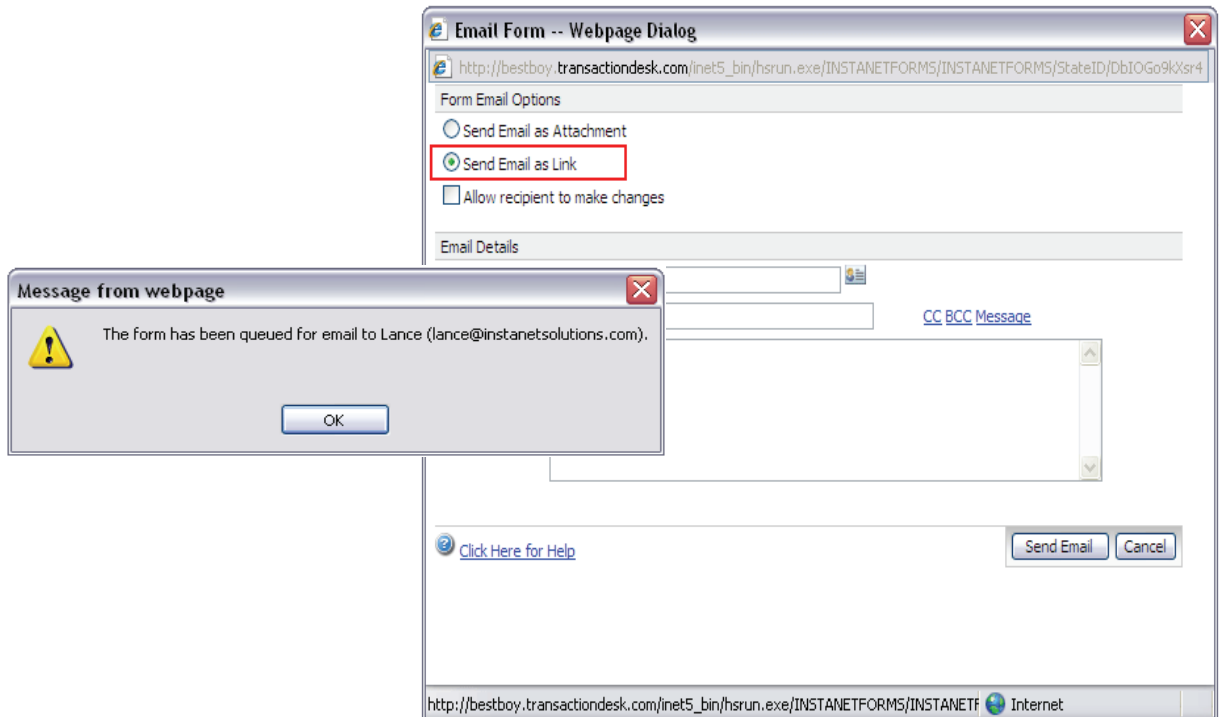
## Send >> Via Email

'Via Email' emails the form in the editing screen.

'Send Email as Link'.

**Includes a link that will let the recipient view the form**

- Enter the recipient's name and email address
- Add a message
- Click "Send Email"
- A pop-up screen appears confirming the email.
- Click the "OK" button





# InstanetForms

New

## Send >> Via Email

'Via Email' emails the form in the editing screen.

- Sample Email.

DocBox Form Invitation Sent from Nicholas Adams

DocBox - (Form Invitation)

**Attention: Lance Campbell**

You have been sent an invitation to view a form from:  
Sender: [Nicholas Adams](#)  
Company: [Greater Rochester Association of REALTORS](#)  
Phone: [519-432-9115](#)  
Fax: [519-432-6515](#)  
Email: [nick@instanetsolutions.com](mailto:nick@instanetsolutions.com)

**Instructions:**

1. Click a form link below.
2. A new window will open containing the form.

**Additional Details:**  
Click on a form link below to open the form in your browser.

1. [\[9\] - \[9\] - Property Inspection \(08-04\).pdf](#)



**Nicholas Adams**  
Agency: Greater Rochester Association of REALTORS  
Address: 930 East Avenue  
Rochester, NY 14607  
Phone: 519-432-9115  
Fax: 519-432-6515  
Email: [nick@instanetsolutions.com](mailto:nick@instanetsolutions.com)  
Website:



# InstanetForms

New

## Send >> Via Email

Recipient opens link to review the form.

**Note:** No changes can be made to the form.



New

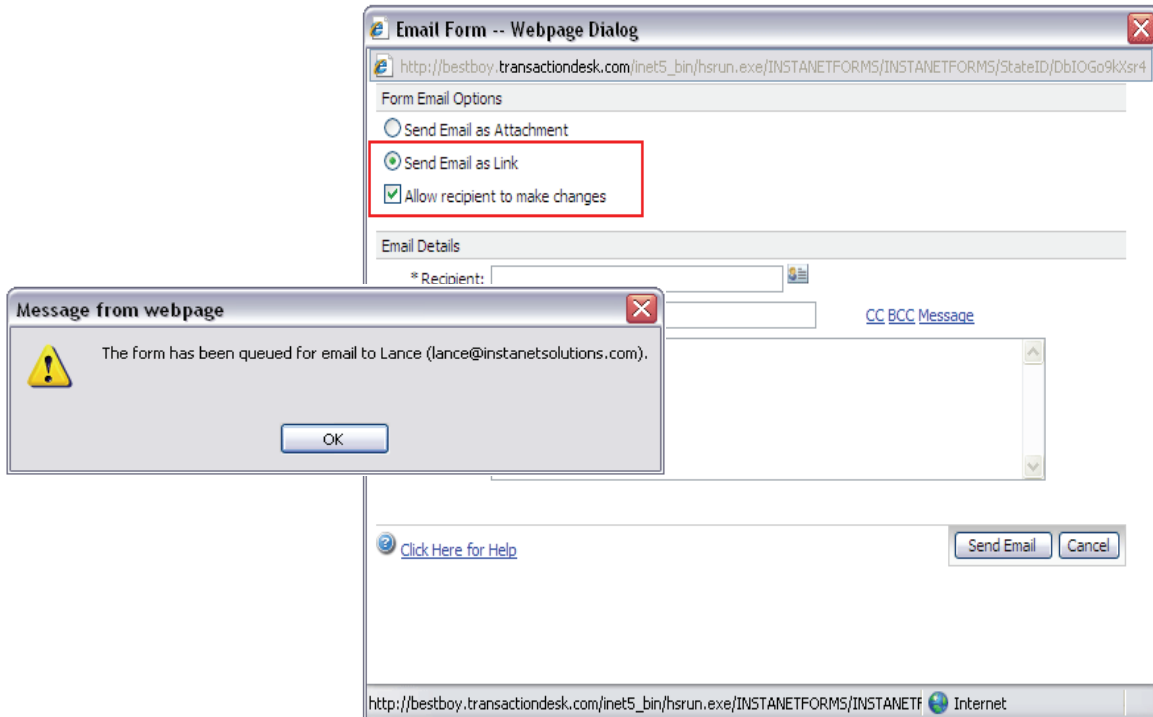
## Send >> Via Email

'Via Email' emails the form in the editing screen.

'Send Email as Link' & 'Allow recipient to make changes'.

**Includes a link that will let the recipient make changes on the screen and return.**

- Enter the recipient's name and email address.
- Add a message.
- Click "Send Email".
- A pop-up screen appears confirming the email.
- Click the "OK" button.





# InstanetForms

New

## Send >> Via Email

'Via Email' emails the form in the editing screen.

- Sample Email.

DocBox Form Invitation Sent from Nicholas Adams

DocBox - (Form Invitation)

**Attention: Lance Campbell**

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**Instructions:**

1. Click a form link below.
2. A new window will open containing the form.

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Click on a form link below to open the form in your browser.

1. [\[9\] - \[9\] - Property Inspection \(08-04\).pdf](#)



**Nicholas Adams**  
Agency: [Greater Rochester Association of REALTORS](#)  
Address: [930 East Avenue](#)  
[Rochester, NY 14607](#)  
Phone: [519-432-9115](#)  
Fax: [519-432-6515](#)  
Email: [nick@instanetsolutions.com](mailto:nick@instanetsolutions.com)  
Website:



# InstanetForms

New

## Send >> Via Email

Recipient opens link to review the form and makes changes.

- And then clicks the 'Save' button.





# InstanetForms

New

## Send >> Via Email

When the user opens the form the changes are seen.

File Send Format View Transaction Insert Help

Having trouble loading forms? We recommend Acrobat 8 or newer.  
Click [here](#) to download the latest version of Acrobat Reader.

**ADDENDUM FORM**  
**To Purchase and Sale Contract ~ Property Inspection**

Published by and only for use by the Greater Rochester Association of REALTORS®, Inc.  
and the Monroe County Bar Association

SELLER *Huckleberry Fin* BUYER *Mobby Dick*

PROPERTY *123 By The Sea Drive.*

**PROPERTY INSPECTION**

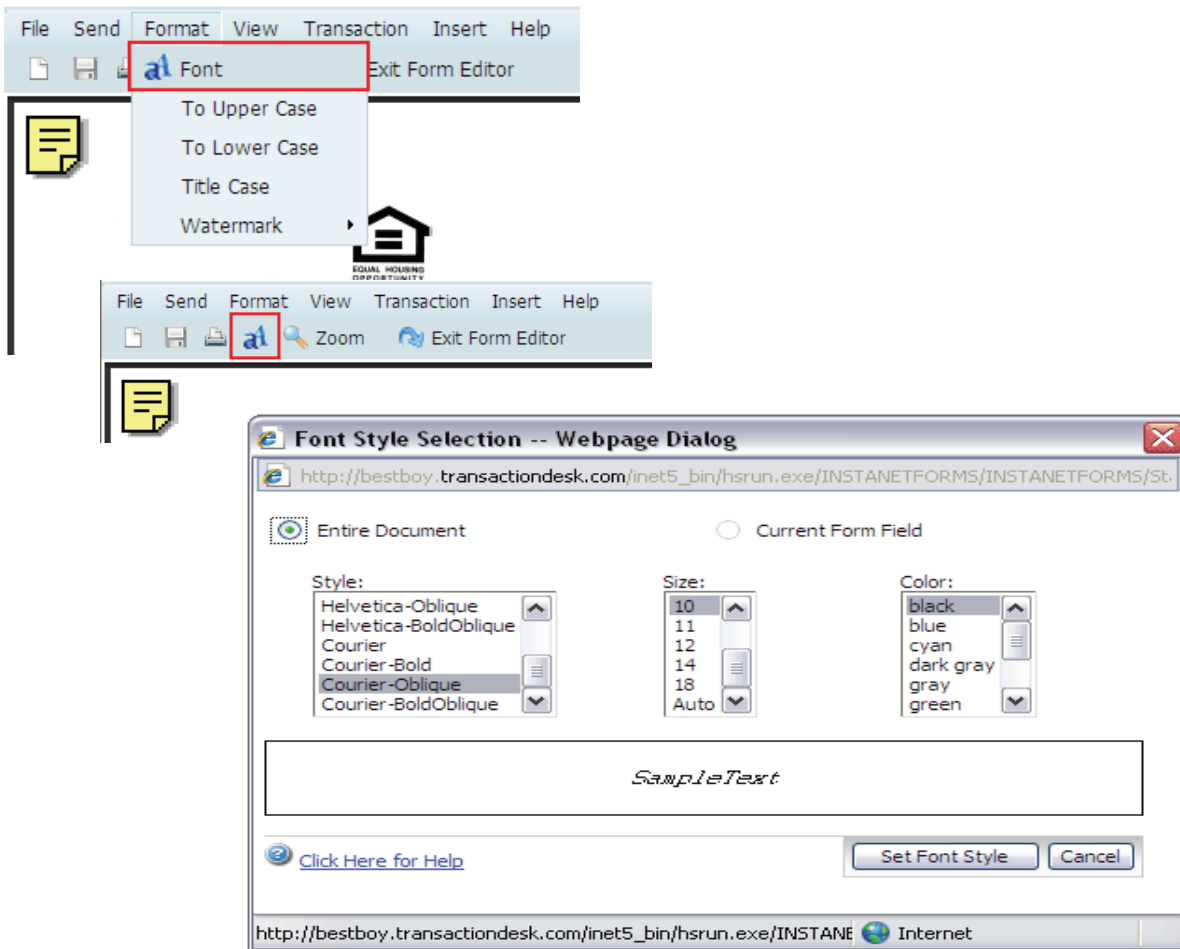
New

## Format >> Font

**Allows the user to change the font in the fields.**

- Available from the menu or the icon toolbar.

The font style, size and color can be changed for either every field on the form or just the current field.

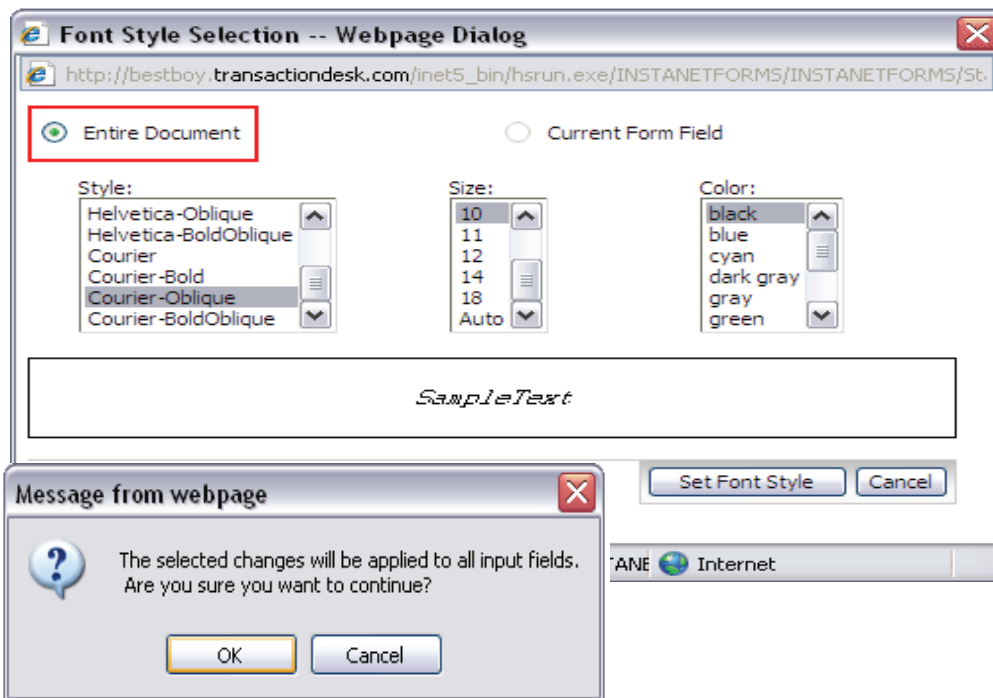


New

## Format >> Font

### Example 1:

- Changed style, size and color for entire document, click “Set Font Style”.
- Pop-up window confirms selections.
- Click the “OK” button.



SELLER *Huckleberry Fin* BUYER *Moby Dick*  
PROPERTY *123 By The Sea Drive.*

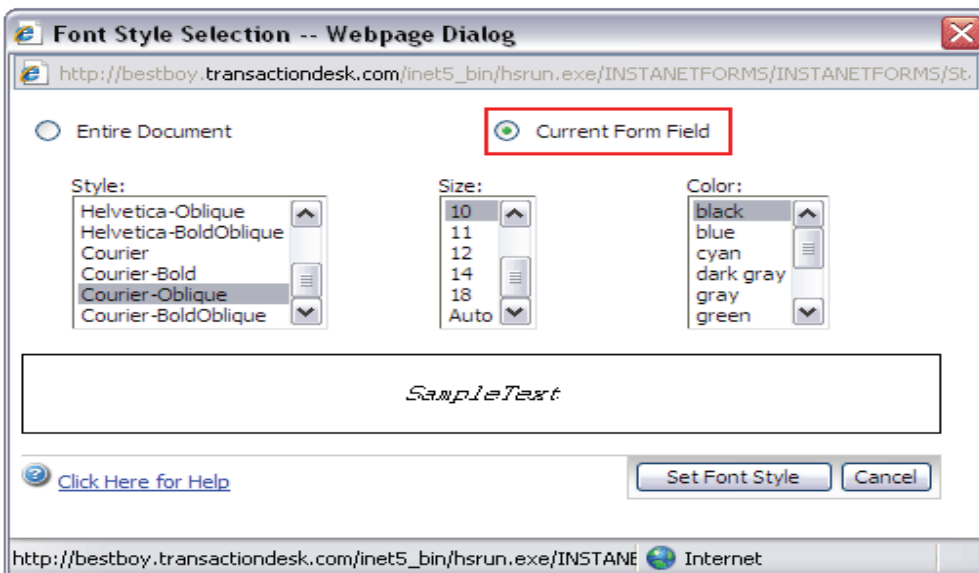
SELLER *Huckleberry Fin* BUYER *Moby Dick*  
PROPERTY *123 By The Sea Drive.*

New

## Format >> Font

### Example 2:

- Changes style, size and color for a single field only.



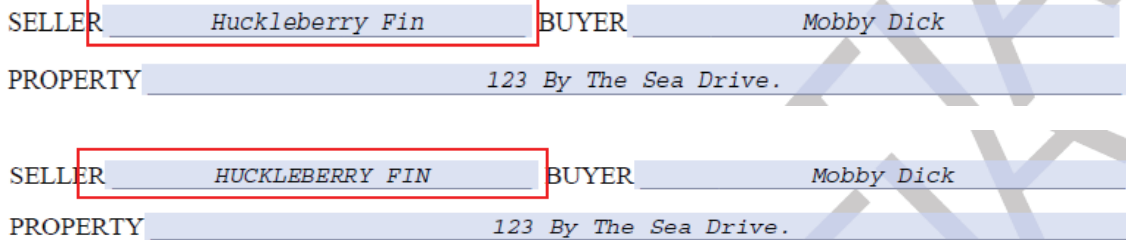
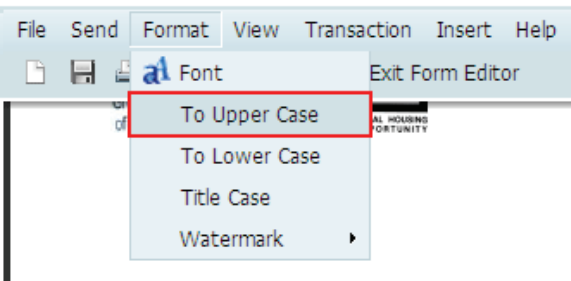
SELLER	<i>Huckleberry Fin</i>	BUYER	<i>Moby Dick</i>
PROPERTY	<i>123 By The Sea Drive.</i>		
SELLER	<i>Huckleberry Fin</i>	BUYER	<i>Moby Dick</i>
PROPERTY	<i>123 By The Sea Drive.</i>		

New

## Format >> To Upper Case

Changes the font in the selected field to all upper case.

- Changes only the selected field.

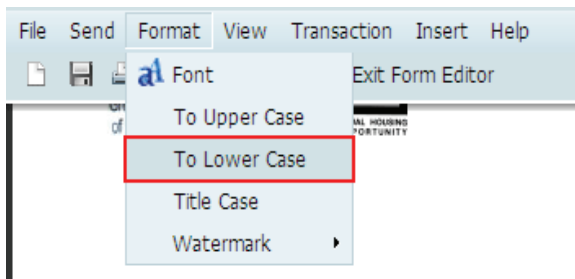


New

## Format >> To Lower Case

Changes the font in the selected field to all lower case.

- Changes only the selected field.



SELLER  BUYER   
PROPERTY

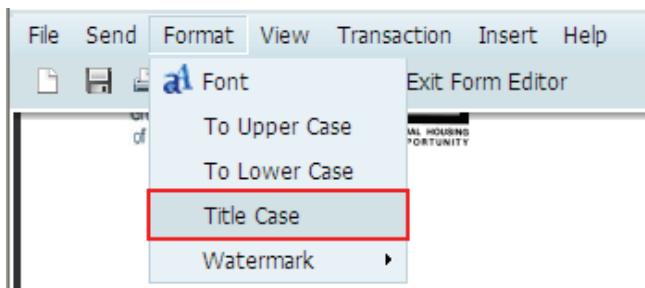
SELLER  BUYER   
PROPERTY

New

## Format >> To Title Case

Changes the font in the selected field to title case.

- Changes only the selected field.



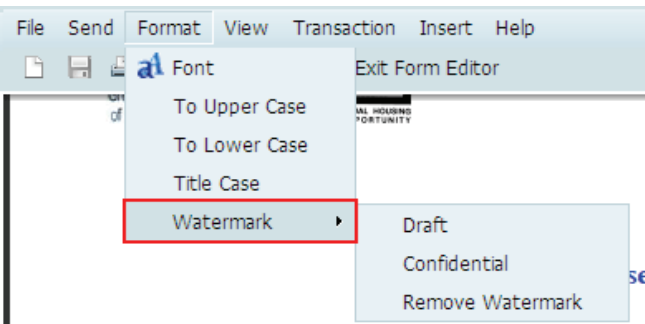
SELLER  BUYER   
PROPERTY   
SELLER  BUYER   
PROPERTY

New

## Format >> Watermark

Adds a watermark to the form in the editing screen :

- Draft
- Confidential
- Remove Watermark



**ADDENDUM FORM**  
To Purchase and Sale Contract - Property Inspection

Published by and only for use by the Greater Rochester Association of REALTORS®, Inc. and the Monroe County Bar Association

SELLER Huckleberry Pin BUYER Nobby Dick

PROPERTY 123 By The Sea Drive.

**PROPERTY INSPECTION**

This contract shall be contingent upon (check all that apply):

engineer's, contractor's, or home inspection service;  radon;  chimney;  pest infestation;  
 other inspection(s) to be made within \_\_\_\_\_ calendar days of the acceptance of the contract, at Buyer's expense. Seller agrees to have all utilities in service at the time of the inspection(s). If Buyer is not satisfied with the inspection report(s), within \_\_\_\_\_ calendar days after completion of all of the inspection(s), Buyer shall deliver to the Seller a written notice listing the specific deficiencies and corrections needed, together with a copy of any relevant written inspection report(s). Upon receipt of such notice, the Seller and Buyer shall have \_\_\_\_\_ calendar days to enter into a written agreement addressing the Buyer's objections. If a written agreement is not reached within the time period stated, either Buyer or Seller may cancel this contract by written notice to the other and any deposit shall be returned to the Buyer. Any work to be performed shall be completed 48 hours prior to the closing date.

If this contingency is not satisfied or waived in writing within the time period stated, then either party may cancel this contract by written notice to the other.

SELLER \_\_\_\_\_ BUYER \_\_\_\_\_

SELLER \_\_\_\_\_ BUYER \_\_\_\_\_

DATE \_\_\_\_\_ DATE \_\_\_\_\_

**ADDENDUM FORM**  
To Purchase and Sale Contract - Property Inspection

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SELLER Huckleberry Pin BUYER Nobby Dick

PROPERTY 123 By The Sea Drive.

**PROPERTY INSPECTION**

This contract shall be contingent upon (check all that apply):

engineer's, contractor's, or home inspection service;  radon;  chimney;  pest infestation;  
 other inspection(s) to be made within \_\_\_\_\_ calendar days of the acceptance of the contract, at Buyer's expense. Seller agrees to have all utilities in service at the time of the inspection(s). If Buyer is not satisfied with the inspection report(s), within \_\_\_\_\_ calendar days after completion of all of the inspection(s), Buyer shall deliver to the Seller a written notice listing the specific deficiencies and corrections needed, together with a copy of any relevant written inspection report(s). Upon receipt of such notice, the Seller and Buyer shall have \_\_\_\_\_ calendar days to enter into a written agreement addressing the Buyer's objections. If a written agreement is not reached within the time period stated, either Buyer or Seller may cancel this contract by written notice to the other and any deposit shall be returned to the Buyer. Any work to be performed shall be completed 48 hours prior to the closing date.

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SELLER \_\_\_\_\_ BUYER \_\_\_\_\_

SELLER \_\_\_\_\_ BUYER \_\_\_\_\_

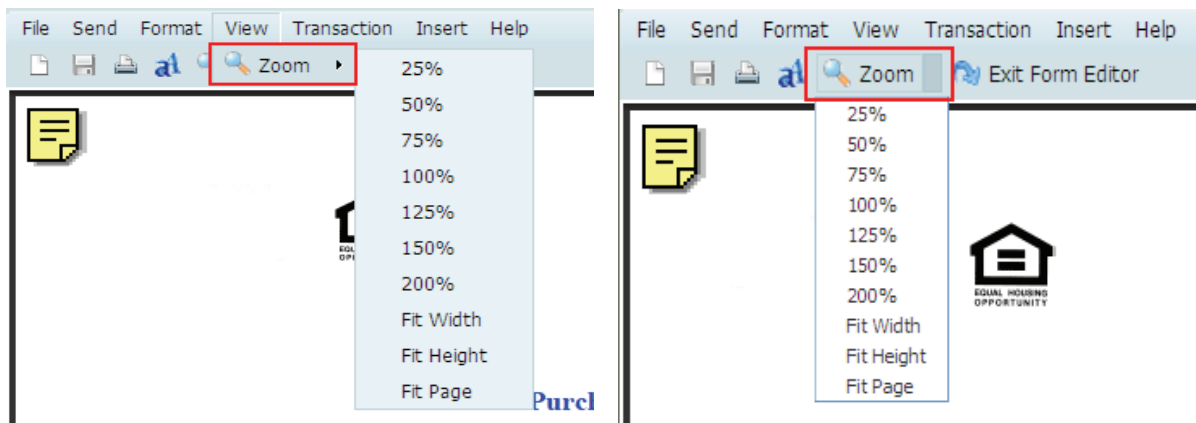
DATE \_\_\_\_\_ DATE \_\_\_\_\_

New

## View >> Zoom

Adjusts the size of the form in the editing screen.

- Available from the menu or the icon toolbar.

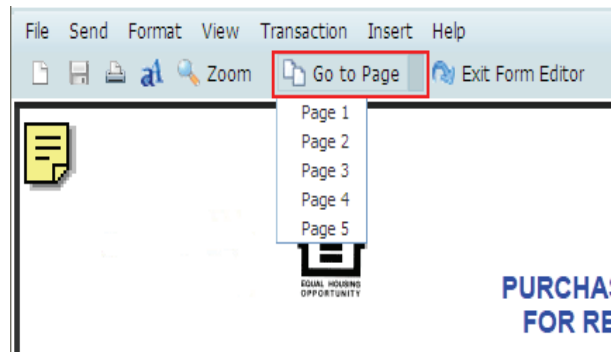
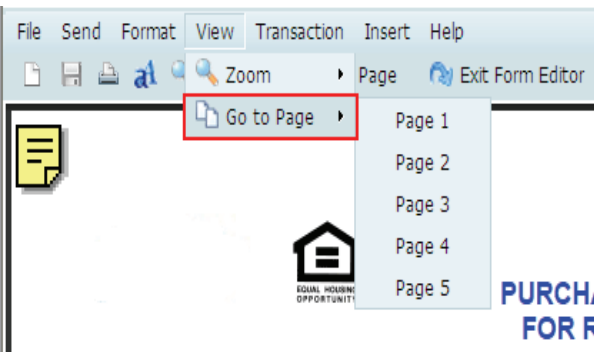


New

## View >> Go To Page

**Moves to another page in the form.**

- Available from the menu or the icon toolbar.
- This is helpful for multi-page forms.



New

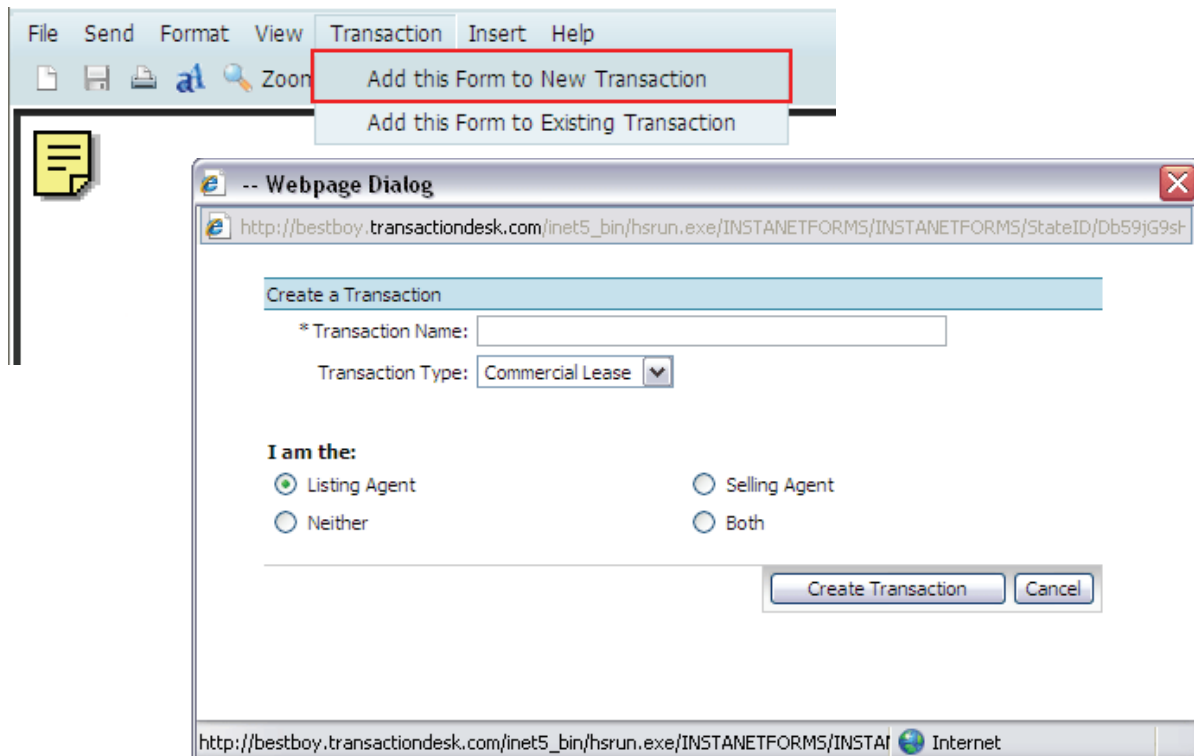
## Transaction >> New

**Creates a new Transaction and attaches the form.**

- Enter the new transaction's name.
- Select a transaction type.
- Click the "Create Transaction" button.

The transaction will now be created and the form will reload in the new transaction.

**Note:** This option is only available to forms not already in a Transaction.



New

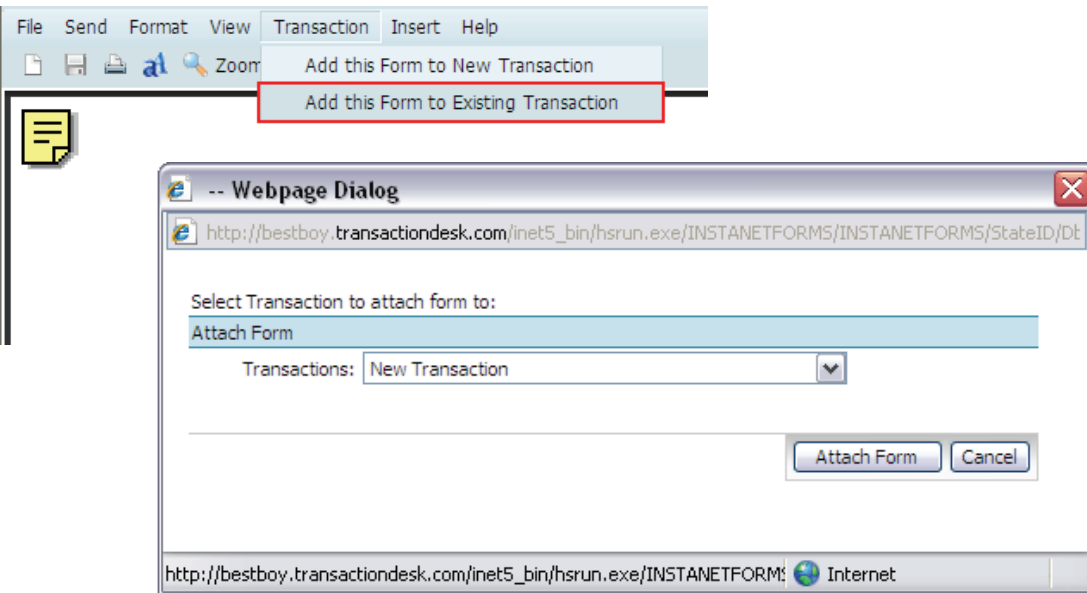
## Transaction >> Existing

**Attaches the form to an existing Transaction.**

- Select the transaction from the list.
- Click the “Attach form” button.

The form will reload in the selected transaction.

**Note:** This option is only available to forms not already in a Transaction.

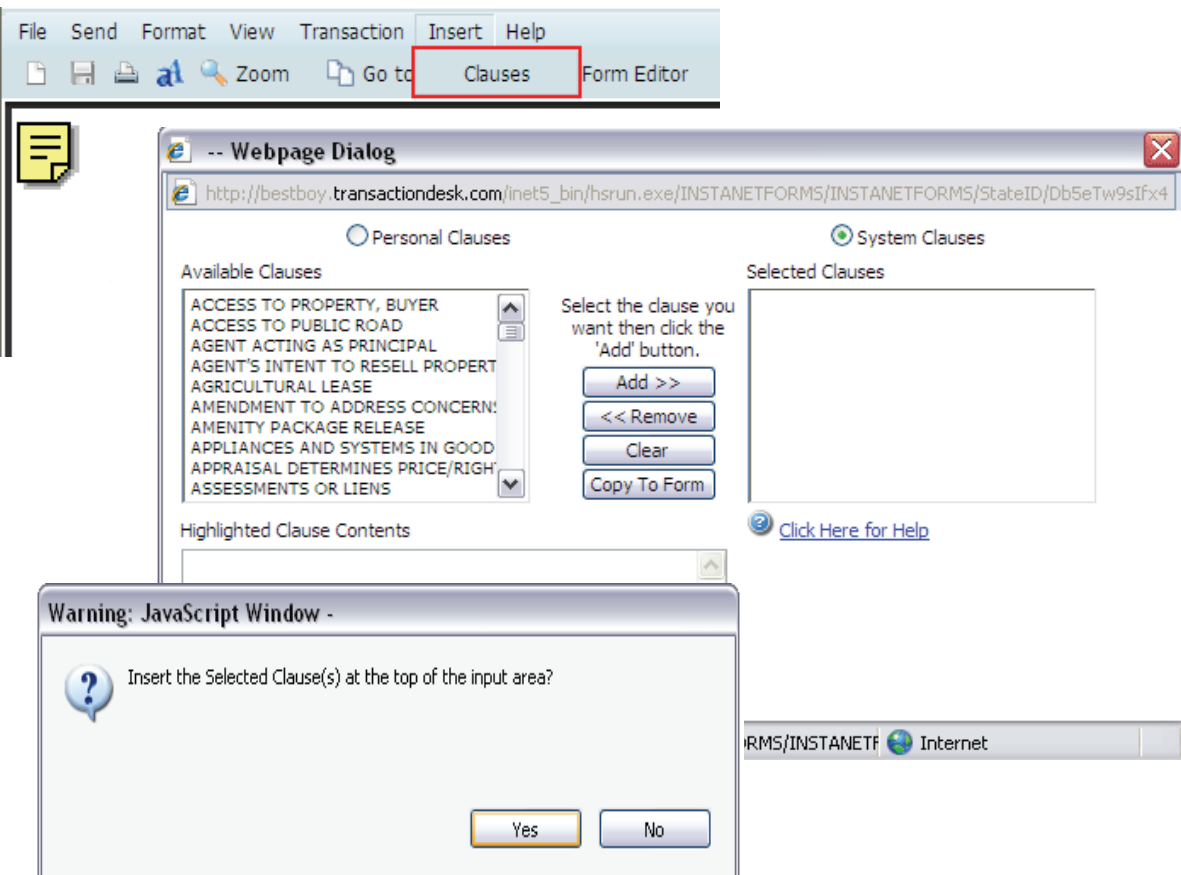


New

## Insert >> Clauses

This feature allows the user to insert frequently used clauses.

- Clauses can be created at the office or individual level.
- Clauses are created in the Settings >> Clauses screen.



New

## Insert >> Clauses

### Step by Step

1. Select the field for the clause.
2. Select Insert >> Clauses.
3. A pop-up screen will appear with available clauses, choose either. Personal or Office clauses.
4. Select your clause by highlighting it.
5. Click the “Add >>” button.
6. The clause now shows in the selected clauses window.
7. Click the “Copy To Form” button.
8. Click “Yes” to the confirmation window.
9. The new clause is inserted in the field.

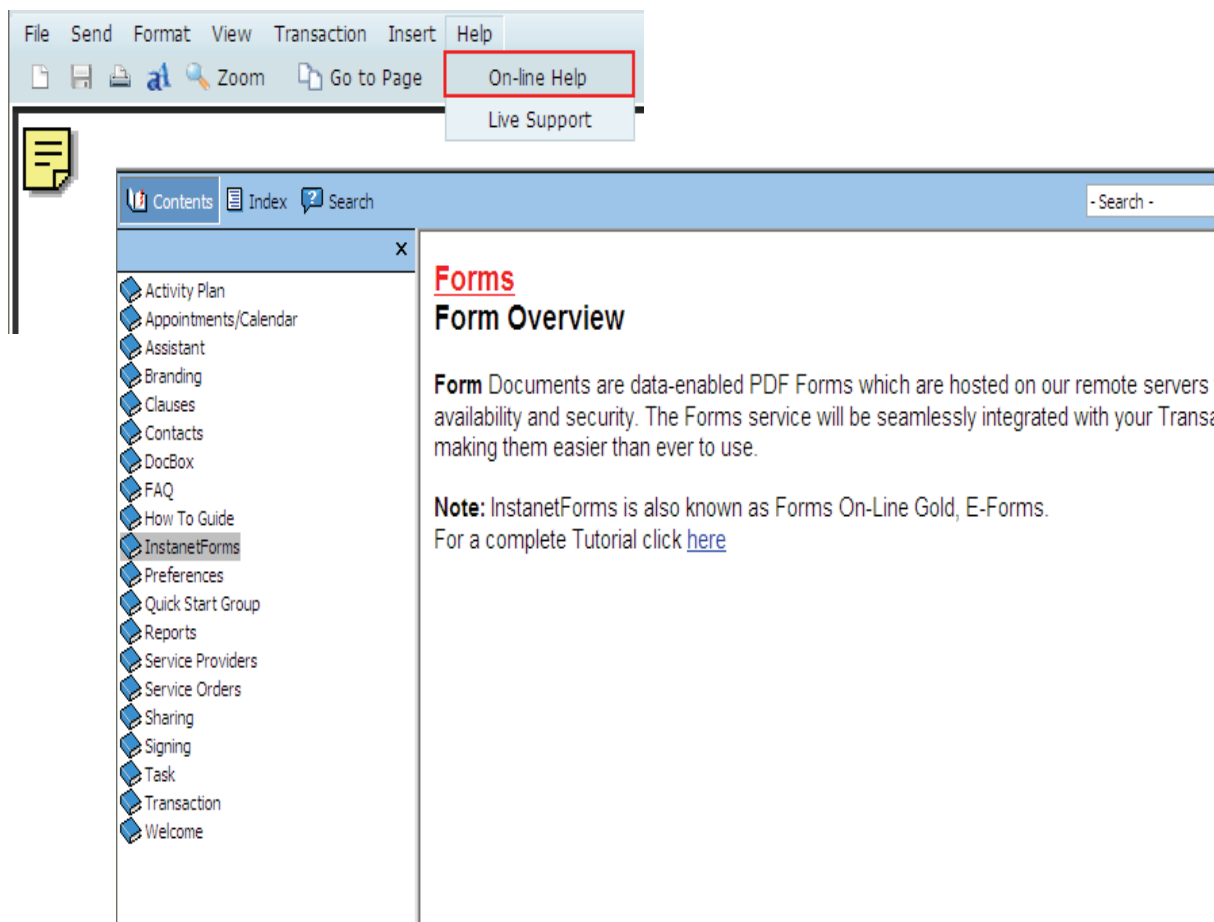
THE UNDERSIGNED BUYER AND SELLER HEREBY AGREE TO THE FOLLOWING:

*Notwithstanding any other provision in this Agreement to the contrary, Buyer and Buyer's representatives shall enter the Property for the purpose of inspecting, examining, testing, and surveying as follows:*

New

## Help >> Online Help

Selecting On-line Help opens Instanet's on-line instructions web site.



New

## Help >> Live Support

Clicking on the 'Live Support' link will connect you to interactive online support chat.

- Monday – Friday: 9 am to 7 pm est.

The screenshot shows a web application interface. At the top, there is a menu bar with the following items: File, Send, Format, View, Transaction, Insert, and Help. Below the menu bar, there are several icons and labels: a document icon, a folder icon, a printer icon, a magnifying glass icon labeled 'Zoom', and a document icon labeled 'Go to Page'. The 'Help' menu item is expanded, showing two sub-items: 'On-line Help' and 'Live Support'. The 'Live Support' item is highlighted with a red rectangular box. Below the menu bar, there is a chat window titled 'DocBox LIVE INTERACTIVE ONLINE SUPPORT'. The chat window has a blue header and a yellow background. The text inside the chat window reads: 'Welcome to DocBox Live Interactive Online Support Chat. This is a text-based chat system which allows you to talk online in real-time to our technical support team. Online Live Support Chat is available Monday to Friday between the hours of 9 am - 7 pm ET. Before You Log In:'. Below this text, there are three bullet points: '• Have you read the [Help Documents](#)? Almost ALL questions we get asked are answered there.', '• This room is for technical support only. Administration inquiries need to be directed to the Forms representative handling your request.', and '• In order to help us help you best, we will need as much specific information relating to your inquiry as possible. Please have all relevant details handy. This includes your request code, full and exact error messages, software details, or an exact description of the problem you are experiencing.' Below the bullet points, there is a paragraph: 'Please remember that we are happy to help with your DocBox problems, however, many problems are directly related to the hardware you are using, and in those cases it is best to contact your hardware vendor for assistance. Just connect to the chat server by using the web-based server interface. You do not need any IRC software, just your browser. The chat session will take place in a new window.' At the bottom of the chat window, there is a small graphic with the text 'Live Support! Online' and a green button with the text '>>> CLICK HERE'.