



Going from a Filing Cabinet to being Paperless

Details for iPad Hands On Training

1. Dropbox - A detailed description of it's use. How it will become your system of transporting all your docs to all your office and mobile devices
2. PDF Expert - The engine that creates the system and then sends it to dropbox for synchronization.
3. Get PDF Expert synchronized with Dropbox
4. Create a folder system that will synch with all devices
5. Using Forms to show properties, Pre-Buyer interview, Pre-Listing Interview and Receipting deposit cheque. All done paperless.
6. REALTORS@s will receive a copy of all the forms at the class. We will save them and then you can use them as templates for each client.
7. Making Appointments to show listings and recording times and addresses without paper.
8. Using Webforms. Editing a Listing Agreement with the iPad. Download the Agreement to PDF Expert. Save it in the client's folder then initial and sign it. Immediately email a copy to the seller. This would also be applicable to a Buyer Representation Agreement.
9. A demonstration on using DocuSign and a overview of other electronic signature software.
10. Scan a document after a signature and send it back to the other REALTORS@ while still in the property. If an Agreement of Purchase and Sale, the client can sign the paperwork and then you will be able to scan it. The software for scanning is called "Scanner Pro" and it's in the App Store. I have used numerous ones but this is the best one I have seen so far.
11. Sending your files to the office while on the road. With multiple files, merge them into one document from the Offer, Amendments, Waivers, Trade Sheets etc.

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12. You will leave the class with a complete system that will allow you to be paperless. Every transaction you do from now on (and previous ones if you wish) will always be with you. Every offer, amendment, waiver, photos, etc will always be there and you will never have to say "I'll get that when I get back to the office".

What the REALTORS® should do First

1. Have a good basic knowledge of the iPad and being able to navigate with it
2. Install Dropbox on your iPad - Go to the App Store and search for Dropbox and install the app so it's ready to use.
3. Create a folder inside Dropbox and name it PDF Expert. If that is a bit intimidating don't worry as we can do it at the class.
4. Install PDF Expert version 5. Be sure it is the version that says Annotations - Fill in Forms.
5. Webforms will be covered. You will need a knowledge of WEBForms to follow along. It is not necessary to login and use it during the class. In fact it is just as well that you watch the demonstration as it will go faster for you and you will have all the documentation to help. They MUST use SAFARI only for WEBForms on the iPad. Most can do it through your Board. Some boards don't accept Safari so if that happens please be sure to login through
 1. <http://webforms.realtorlink.ca/webforms/> REALTORS@s will need to know their password to go that route.
6. Scanner software will be demonstrated. If you have a scanner APP that works for you that is perfect. If not, the one I use is "Scanner Pro" in the APP Store.

To help you choose the APPS, here are the icons in the APP Store.				
				
PDF Expert	Dropbox	Scanner Pro	DocuSign	Authentisign