

## relay® Training

Tips, tricks, and support for  
agents just starting online real  
estate



[www.ziplogix.com/relay](http://www.ziplogix.com/relay)  
[support.ziplogix.com](http://support.ziplogix.com)

relay 

Welcome to agent training for relay®. Today we will cover many things, but we don't expect you to remember every detail. Our goal today is to show you some of the things you can do with your relay® account. Please take notes and ask questions during the training to make it a better experience for you and your colleagues.

Feel free to use all or some of these tools as you become more familiar with relay® and learn all of the different ways relay® will help you connect to current clients and attract new buyers and sellers!



Today we're going to cover how start using relay® to help you get...

- Organized
- Online
- Out of the office

With a few online tools, you can go to paperless transactions, but there are a lot of factors involved in your transactions, so let's take it one step at a time. We're going to start today by looking how you can have **less paper**, **fewer** photocopies, and **fewer** faxes in your transactions today!

## The New Real Estate File



The image illustrates the transition from a physical real estate file to a digital one. On the left, a messy pile of papers and folders is shown. A large blue arrow points from this pile to a screenshot of the Relay Real Estate software interface on the right. The interface displays a user profile for Jane Doe, transaction details for 123 Main Street, and various sections for property and sale information.

relay

Home | Transactions | Activities | Contacts | MyForm 6 Administration | Profile | Sign Out | Help

Jane Doe  
Relay Training Brokerage  
888-768-7123  
jdoe@relay.com

Transaction ID: 123297  
123 Main Street, City, ST 12345  
Closing Date:  
Buyer: None

Cover Sheet Documents Checklist Notes History

Jane Doe, you have full access to Listing Side of this transaction.

Date created: 06/30/2009, 10:19 PDT Date last modified: 06/30/2009, 10:21 PDT

Transaction Detail, Connected with MyForm 6 transaction: 123 Main Street - LN 3241337

Edit Transaction Detail Sync from MyForm 6 Transaction Contacts Create Transaction CD

Property Information

Address 1	Address 2	City	State	Zip Code	County	Township
123 Main Street		City	ST	12345	Shakespeare County	

Sale Information

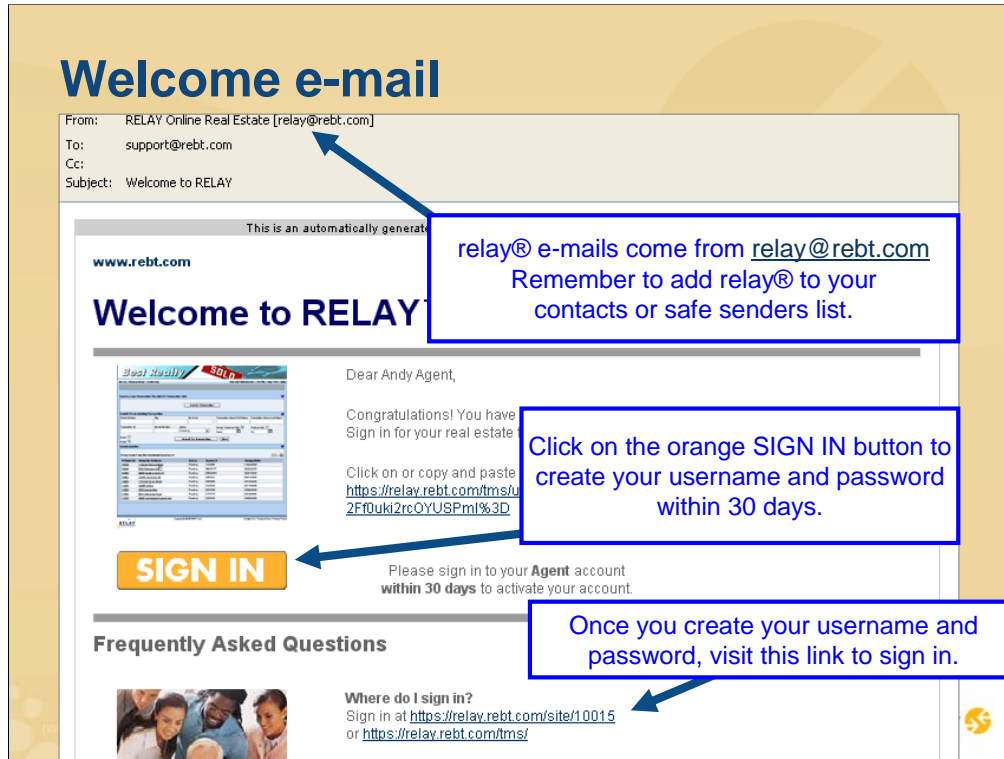
Transaction Created By	Transaction Type	Start Date	Listing Agreement Date	Purchase Agreement Date	Closing Date
Listing Side	Prospect		06/18/2009		

Legal Description	Listing Price	Balance of First Trust Deed	Property Includes
Assessor's Parcel Number	Purchase Price	Balance of Second Trust Deed	
	\$450,000.00	\$235.00	
		\$2,310.00	

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Your new real estate file is organized, professional, and online. It means taking the pile of paperwork you work with every day, and moving it online, where you can securely reach it 24/7.

Just as any other new filing system, there is an adjustment period as we grow accustomed to a new process. Today we will take a look at some of the steps you can take to improve that period.



Every relay® user creates their own username and password to sign in to relay®. This helps keep your transaction information secure.

To create your own username and password, just click on the orange SIGN IN button to create your username and password the first time. After you have a username and password, remember to use the [www.RELAYLogin.com](http://www.RELAYLogin.com) link with your site ID number!

A site ID number is a five-digit number which identifies your online office, the same way that the street number on your address helps to identify your brokerage building.

Remember, you have 30 days to SIGN IN, or this temporary account expires, and you will need to have your password reset.

TIP: Not sure what your site ID number is? Scroll down on your e-mail to check the Frequently Asked Questions section.

## Sign in to your relay® brokerage site

- [www.relayLogin.com](http://www.relayLogin.com)

The screenshot shows the login page for a relay® brokerage site. At the top, there is a yellow banner with the relay® logo. Below the banner, the site name is "relay Training Brokerage - Online". There are two language options: "English" and "Spanish". The main content area contains a login form with fields for "User Name:" and "Password:". Below the password field, it says "(Password is Case Sensitive)" and there is a "Sign In" button. To the right of the "Sign In" button is a "Sign In" callout box. Below the "Sign In" button are links for "Forgot User Name?", "Forgot Password?", and "Add relay® to your favorites". To the left of these links is a callout box that says "Click if you forget your User Name or Password". At the bottom of the page, there are logos for "REALTOR Benefits" and "REALTOR Secure", and a footer with "©Copyright 2009, zipLogix. All Rights Reserved." and "Contact Us | Terms of Use | Privacy Policy".

Brokerage Banner (Customize in Admin)

Switch from English to Spanish

Sign In

Click if you forget your User Name or Password

Your relay® brokerage site allows you to use a username and password like a set of keys to access your files. It personalizes your appearance to your clients, and it allows you to sign in from any internet connection.

## Start the Transaction in relay®

- A **Transaction** in relay® can store documents (computer files), track tasks to be completed, and record an event log as you work
- relay® allows you to access files from any internet connection **24/7**
- Working online **reduces your risk** and can increase communication and service to clients
- Files on relay® can be **downloaded to a CD**

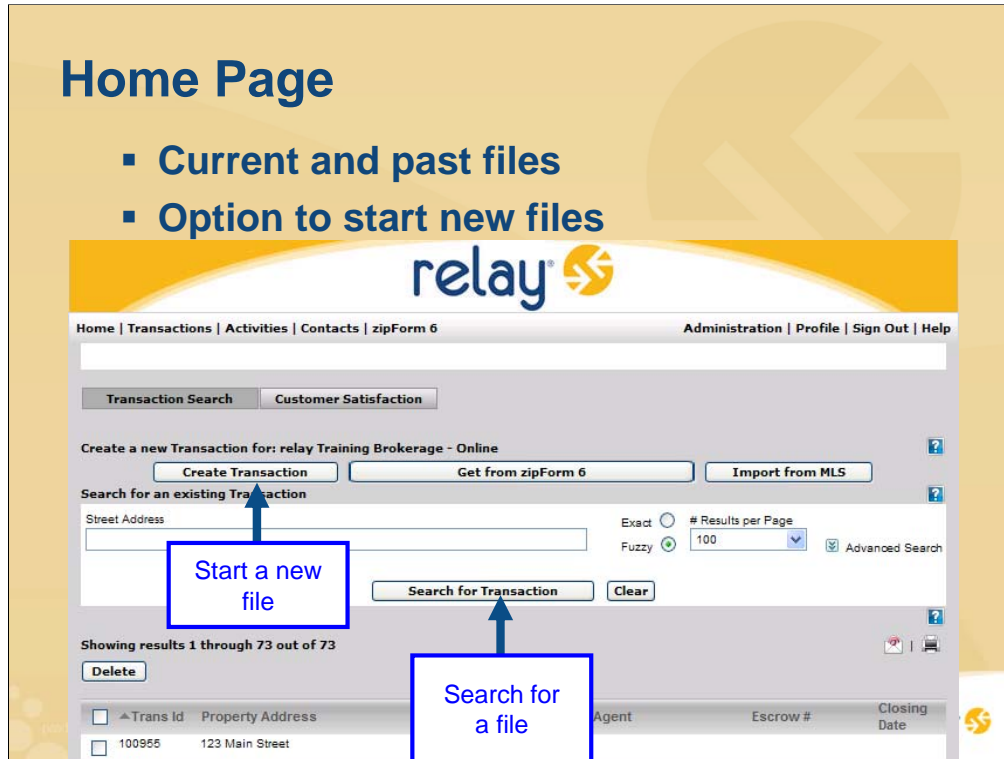
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relay 

Just like your paper files, transaction files are labeled according to the property or the client. With today's training, we will see how to construct a file that will improve your business.

## Home Page

- Current and past files
- Option to start new files



The Home | Transactions page is the first page you see when you sign in. It is one of the four primary navigation pages dealing with transactions.

The other three pages include:

**Activities:** where you can view, search, and update all of your transaction Activities

**Contacts:** your address book for all of your transactions. You can use Contacts in relay® to fill out Transaction Contacts, or you can use them in zipForm® 6 to fill out contact information in forms.

**zipForm 6:** This link is visible if you have updated your **relay® Manager** in zipForm® 6. It will take you directly to your forms (CA users note: It will take you directly to the C.A.R. sign in page if you are in California)

## Labeling the Transaction

The screenshot shows the 'zipForm 6' interface with the following sections and callouts:

- Property Information:** Includes fields for Address 1, Address 2, City, State, Zip Code, County, and Township. A callout labeled 'Property Address' points to the address fields.
- Property Image:** Includes a 'Browse for a Property Image' button. A callout labeled 'Add a (small) picture' points to this button.
- Sale Information:** Includes dropdowns for 'You Represent' (Listing Side) and 'Transaction Type' (Listing). A callout labeled 'Select the transaction type (Status) and side you represent' points to these dropdowns.
- Legal Description:** Includes fields for Listing Price, Balance of First Trust Deed, Assessor's Parcel Number, Purchase Price, Balance of Second Trust Deed, Listing Brokerage File to #, Homeowners Association Dues, Other Liens, Property Includes, Buyer Brokerage File to #, MLS Number, Description of Other Liens, Property Excludes, Estate Number, Total Encumbrances, and Comments. A callout labeled 'These four dates control many due dates on the checklist' points to the date fields: 'Start Date (MM/DD/YYYY)', 'Listing Agreement Date (MM/DD/YYYY)', 'Purchase Agreement Date (MM/DD/YYYY)', and 'Closing Date (MM/DD/YYYY)'.

The Cover Sheet serves as a label for the transaction, and provides an easy-to-access reference point for all files.

Fill in the property address (or leave it blank), add a property picture, and fill in property details.

It is important to select the appropriate side you are representing:

**Listing Side:** The Primary agent/team represents the seller

**Buying Side:** The Primary agent/team represents the buyer

**Listing and Buying Side:** A single primary agent/team represents both buyer and seller

Please note: when in an office, if different agents are representing different sides, select one side (for instance, the listing side), then you can easily add the other side (for instance, the buyer's agent) through the contacts later in the transaction.

The transaction type is important, and should be updated throughout the life of the transaction.

**Listing:** You have a listing contract

**Purchase:** You have an executed purchase agreement


**Prospect:** A prospective buyer or seller

**Inactive:** A transaction which has fallen through

**Closed:** A transaction that has closed


**Unknown:** A file that has just been synchronized from zipForm® 6. Select a new Transaction Type to fully edit and use this file.

# A Place for Everything



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[Home](#) | [Transactions](#) | [Activities](#) | [Contacts](#) | [zipForm 6](#)

[Administration](#) | [Profile](#) | [Sign Out](#) | [Help](#)



**Jane Doe**  
 relay Training Brokerage  
 866-738-7328  
 odavis@ziplogix.com



**Transaction ID 114639**  
**123 Jones Ave**  
**Closing Date:**  
**Buyer: None**

Cover Sheet
Documents
Checklist
Notes
History

Jane Doe you have full access to Listing Side of this transaction.

Basic file information

Activities and tasks

Complete record of the transaction

Forms, emails, pictures:  
anything you might have printed out on paper

Communication Log:  
Important Highlights

Edit Trans
form 6
Create Transaction CD

**Property Inf**

Address 1: 123 Jones A

**Sale Inform**

Transaction Created By: Transaction Type: Start Date: Listing Agreement Date: Purchase Agreement Date: Closing Date:

Once you create your file, you can begin storing information online and receiving instant updates on your files.

## Uploading Documents

- A **document** is any item you would like to add to your online file for this property sale
- relay® accepts most types of **computer files** as documents
- Paper documents can be faxed in or scanned in using the **Fax Cover Sheet** or **Email to relay®**
- “Paperclip” files together by adding a **new version** of the document (through the Document Detail)

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Documents form the core of the transaction. There are many ways to add these documents – uploading, email, fax - so that you can find the route that saves you the most time.

The screenshot shows the relay® Documents Tab interface. At the top, there's a navigation bar with links for Home, Transactions, Activities, Contacts, ZipForm@Online, Administration, Profile, Sign Out, and Help. Below this, a user profile for Jane Doe (RELAY Brokerage) is displayed. The main content area has tabs for Cover Sheet, Documents, Checklist, Notes, and History. A 'Transaction ID 62399' is shown. Below the tabs are buttons for 'New Document', 'Email or Fax to relay®', 'Public Documents', and 'Provider Workspaces'. A 'Document List for Transaction' section contains a table of documents. Callouts with arrows point to specific features: 'Email or Fax in a new document' points to the 'Email or Fax to relay®' button; 'Work with any service provider' points to the 'Provider Workspaces' button; 'Add a new document to the list' points to the 'New Document' button; 'Share documents with anyone' points to the 'Public Documents' button; and 'Click a document name to open it' points to the 'Blueprints of the Property V 2' document name in the table.


Document	Sell Side Status	Date	Activity	By	Group	Comments	Seller	Buy Side	Detail
<input type="checkbox"/> 123 Columbus Drive V 1		11/19/2009, 12:55 PST	Unspecified	Jane Doe	Unspecified		✗	✗	🔍
<input type="checkbox"/> <u>Blueprints of the Property V 2</u>		03/05/2009, 10:33 PST	Unspecified	Jane Doe	Listing	Revised blueprints with 2001 addition.	👁	👁	🔍
<input type="checkbox"/> Broker Document (Placeholder)						verage agreement	✗	✗	🔍
<input type="checkbox"/> <u>listing agreement addendum V 1</u>		10/22/2009, 10:22 PST	Unspecified	Jane Doe	Documents		👁	✗	🔍
<input type="checkbox"/> <u>MLS Document V 1</u>		03/05/2009, 10:13 PST	Place Listing on	Jane Doe	Unspecified	Fill out this document for the MLS	👁	✗	🔍

You can think of the Documents tab as a quick way of seeing your documents checklist.


Here you can see all of the documents that you have, and all of the ones you might need, so that you can plan accordingly.

Once documents are added to relay®, they can be shared, emailed, faxed, or viewed at any time, safely and securely.


## Document Detail



Home | Transactions | Activities | Contacts | ZipForm@Online Administration | Profile | Sign Out | Help



Jane Doe  
RELAY Brokerage  
866-736-7328  
support@zipform.com



Transaction ID 62399  
123 Main Street  
Closing Date:  
Buyer: None

Cover Sheet Documents Checklist Notes History

New Document Email or Fax to relay® Public Documents Provider Workspaces

Document List for Transaction

With selected...

<input type="checkbox"/> Document	Sell Side Status	Date	Activity	By	Group	Comments	Seller	Buy Side	Detail
<input type="checkbox"/> 123 Columbus Drive V 1		11/19/2009, 12:55 PST	Unspecified	Jane Doe	Unspecified		✗	✗	
<input type="checkbox"/> Blueprints of the Property V 2		03/05/2009, 10:33 PST	Unspecified	Jane Doe	Listing	Revised blueprints with 2001		✗	
<input type="checkbox"/> Broker Document (Placeholder)		03/05/2009, 10:13 PST	Place Listing: MLS				✗	✗	
<input type="checkbox"/> listing agreement addendum V 1		03/05/2009, 10:22 PST	Listing agree. adden.				✗	✗	
<input type="checkbox"/> MLS Document V 1		03/05/2009, 10:13 PST	Place Listing on M.C.	Jane Doe	Unspecified	Fill out this document for the MLS	✗	✗	

Click on the magnifying glass next to a document to view the document detail and add new versions of a document, create a fax cover sheet for the document, or track signatures.

The document detail magnifying glass will help keep your transaction organized and complete!

## Keeping on Track

- The **Checklist Tab** contains an activity list for the transaction
- An **Activity** is any task you want to keep track of during the property sale
- **Automatically Apply** checklist templates to have a pre-set list of activities for a transaction (including required documents and contacts!)
- Daily **Activity Reminders** keep you on time

checklist by relay


relay 

Your checklist keeps track of more than just document deadlines. It is the first place to go when you need to find out what needs to happen in a file.


Use the checklist tab to keep track of all of your “To Do” items. It organizes everything you need to accomplish for this transaction in one easy-to-use, color-coded list.

# Checklist Tab

Home | Transactions | Activities | Contacts | ZipForm®Online Administration | Profile | Sign Out | Help



Jane Doe  
relay Training Brokerage  
888-738-7328  
odavis@ziplogix.com



Transaction ID 105927  
123 Pluto Drive, Orlando, FL 12345  
Closing Date:  
Buyer: None

Cover Sheet Documents Checklist Notes History

Add Activity Apply Checklist Add items

**Search for Activities**

Quick filter: All Activities On All Sides

Exact  # Results per Page: 250  
Fuzzy  Advanced Search

Search for Activities Search existing activities

Showing results 1 through 10 out of 10

Legend: Past Due Due in 3 days Pending Completed

<input type="checkbox"/>	Activity Name	Group	Responsible Party	Status	Due Date	Seller	Buy Side
<input type="checkbox"/>	Updated Real Estate Resume	General	Listing Side	Completed	11/04/2008	✗	✗
<input type="checkbox"/>	Remind seller of listing appointment	Listing	Listing Side	Pending	11/08/2008	👁️	✗
<input type="checkbox"/>	Listing Presentation	Listing	Listing Side	Completed	11/08/2008	✗	✗

Who can see this activity

You do not have to have a checklist to start a transaction, but it is helpful. You can use the checklist tab to add activities one by one, or to apply a checklist template which has many activities, documents, and contacts which you use on every transaction.

If you are using a checklist template, it is usually easier to start your transaction on the Checklist tab, rather than on the Documents tab, because your Checklist Template might have many of the documents you're about to add.

You can create your own checklist templates by using the main "Activities" link at the top left of your relay® screen and clicking on the "checklist templates" button. Please note that going to this link will take you out of this transaction.

From: RELAY Online Real Estate [relay@rebt.com]  
 Subject: RELAY Activity Notification

www.rebt.com

## Activity Notification

Dear Jane Agent,

The following transaction activities for RELAY™ site **RELAY Demo** (ID: 10004), where you have the role of **Agent**, are either overdue or due in 3 day(s) or less:

**Property Address: 1234 Bay Dr.** Transaction ID: 21186

**Activity Name** Group

Pest Inspection Disclosure Documents

**Property Address: 12345 Mountain View**

**Activity Name** Group

Present Escrow Package Escrow

**Property Address: 555 Elm Street**

**Activity Name** Group

Activity Name	Group	Status	Due Date
Combined Hazards Book - Form FLD	Disclosure Documents	In Progress	02/13/2006
Natural Hazards Zones Report	Disclosure Documents	Not Started	02/15/2006
Smoke Detectors	Disclosure Documents	Not Started	02/15/2006

Activities in red are overdue.  
 Activities in blue are due within 3 day(s).

**E-mail notifications sent every day from relay@rebt.com**

**Click the property address to open the file and update activities.**

Your automatic e-mails arrive every morning, with all of your activities for all of your transactions that are coming due, due, or past due that day.

Click on the property address to open the file and update activities.

TIP: If your e-mails from relay® are hard to find, or are going to your spam filter, add "relay@rebt.com" to your contacts list to make sure the e-mails always get through!

## Communicating with Clients

- Reduce your risk with a complete communication log on the **Notes Tab**
- Share notes with clients, and allow them to respond
- relay® keeps track of everything with an automatic **History**
- And of course, share elements of the file throughout using **visibility**

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Client communication is the number one source of client satisfaction.

At the same time, keeping a communication log is the number one thing you can do to reduce your risk in a transaction file.


This is why relay® gives you many ways to increase your communication and outreach to your client, from sharing documents and notes online, to keeping an automatic history of all events.

## Add a note




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[Administration](#) | [Profile](#) | [Sign Out](#) | [Help](#)



**Jane Doe**  
 relay Training Brokerage  
 866-736-7328  
 odavis@ziplogix.com



**Transaction ID 105927**  
 123 Pluto Drive, Orlando, FL 12345  
**Closing Date:**  
**Buyer: None**

Cover Sheet
Documents
Checklist
Notes
History

Add Note
Click Add Note to enter a note on this file

**Notes for Transaction**

With selected... Notes can be sent or printed, but cannot be edited or deleted

<input type="checkbox"/>	Note Id	Date added	Activity Date	Type	By	Comments	Seller	Buy Side
<input type="checkbox"/>	293945	10/08/2009, 18:54 PDT	10/08/2009, 19:00	Phone Call	Barb Agent	Seller wants to renew listing		
<input type="checkbox"/>	194907	02/17/2009, 10:36 PST	02/17/2009, 10:30	Welcome to RELAY	Jane Doe	Please check here for regular updates on your transaction.		

With selected... Notes can be sent or printed, but cannot be edited or deleted

Notes can fit anything you need them to. Whether it's a note to welcome your client to relay® and remind him/her that they can always contact you at any time, or the subjects discussed on a conference call, notes can keep track of all those other bits of information which you need to have in your transaction.

Remember! As part of your risk protection, notes cannot be edited or deleted once they are added to relay®, but you can make them “invisible” to your client if there is a typo. Confirm your notes before adding them to RELAY!

TIP: Type your notes in Word first to make sure that the spelling, grammar, and punctuation is correct!

## Inviting Others to Participate Online

- Control who has access to the file using the **Transaction Contacts**
- Transaction Contacts are **side-specific** for each agent
- Clients, transaction coordinators, assistants, team members, and service providers can be invited to **your side** of the transaction
- The other agent can be invited as a **Guest Agent** using the contacts for the other side of the transaction

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You are always in control of who can or cannot see the file, and which elements of the file they can or cannot see (using visibility).

Remember to invite your team and clients to your side of the transaction, and to invite the other agent to their side of the transaction. This will preserve the agency relationship and visibility settings you have selected.

You should see two sets of contacts, unless the transaction is marked as a “Listing”. You will need to update the transaction status on the cover sheet in order to add the Buyer’s agent. We will talk about how to update transaction status in the next step.

The screenshot shows the 'Transaction Contacts' page in the relay@ system. At the top, there's a navigation bar with links for Home, Transactions, Activities, Contacts, ZipForm@Online, Administration, Profile, Sign Out, and Help. Below this, there's a header section with a user profile for Jane Doe (Agent, RELAY Brokerage) and transaction details (Transaction ID 62399, 123 Main Street, Closing Date, Buyer: None). A secondary navigation bar includes 'Cover Sheet', 'Documents', 'Checklist', 'Notes', and 'History'. The main content area is titled 'Transaction Contacts' and is divided into sections: 'Transaction Owner' (Jane Doe), 'Seller Contacts' (George Seller, Jane Doe), and 'Seller Agent Delegate' (Transaction Coordinator 1). Three blue callout boxes with arrows point to specific elements: the first points to the 'Transaction Contacts' header, the second points to the 'Add Seller', 'Add Agent', 'Add Delegate', and 'Add Other' buttons, and the third points to the bottom of the page.

**Transaction Contacts**

On the Cover Sheet, open Transaction Contacts to control contact information and who has access to this file

Add your client, delegates, and service providers (Add Other) to your side of the file

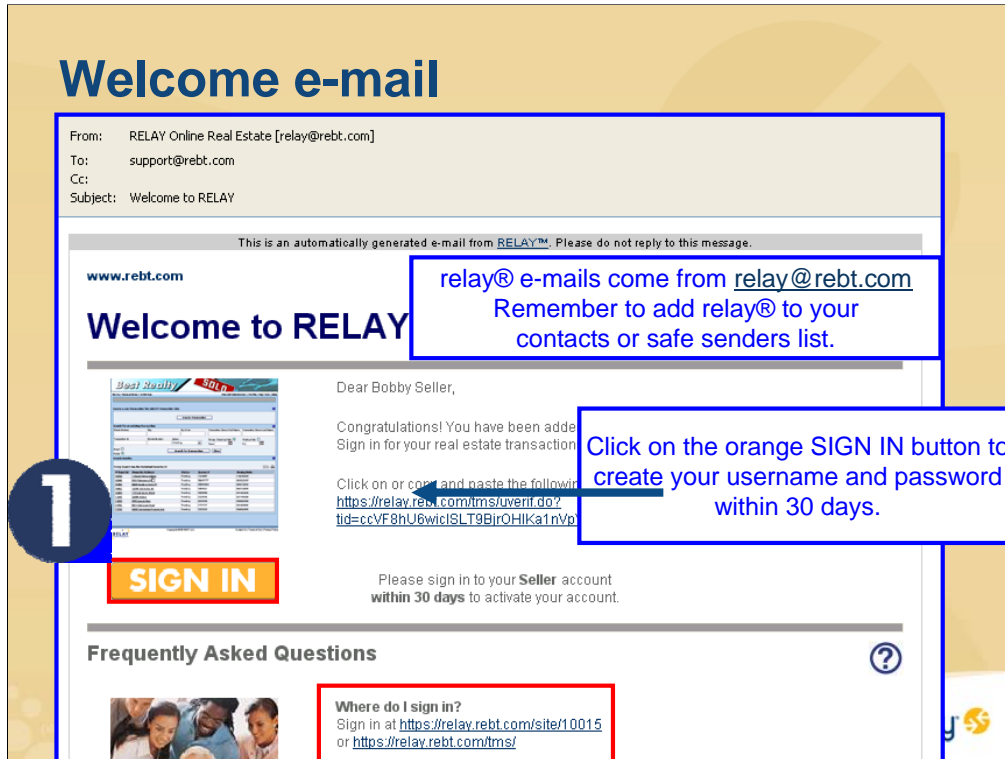
Scroll down for Buyer Contacts

Track contact information and control access to your file through Transaction Contacts.

You can create an account on this page for your client and for the agent on the other side (as a guest agent). Click "Add Seller" or "Add Buyer" to add the client under your contacts, or select "Add Agent" on the other side of the transaction in order to create a Guest Account for the other side. Remember to check the "Create Account" or "Create Guest Account" box to give that user access.

You may also share transaction information with others using relay@. Delegates are people within your office (other agents or team members, assistants, and transaction coordinators) who are already using relay@. Their accounts are controlled by the Site Administrator under the User Manager. You can also seamlessly work with other agents using relay@, in one shared file.

To add a service provider, click the Add Other button. Once added, you can invite them into a transaction through the Provider Workspace on the Documents tab.



Call or e-mail clients to let them know they should sign in to create their secure username and password.

Once your client has created a secure username and password, he or she can always log in at your relay® site at: [https://relay.rebt.com/site/\\_\\_\\_\\_](https://relay.rebt.com/site/____) (fill in your five-digit site Id# at the end). Or link to your relay® site from your website! That is an easy, quick way to advertise the extra benefit you offer all of your clients with online real estate.

Remember, your client has 30 days to SIGN IN, or this temporary account expires, and you will need to reset the password in order to reset this account. After your client clicks the SIGN IN button, he or she creates their own Username and Password, which do not expire.

## Saving and Sharing

- Update the **Transaction Type** (status) as you progress through the file
- Once finished, you can look up **Closed** files easily at any time, but they do not clutter your file list
- Use **Edit Transaction Detail** to keep the Cover Sheet current

As you progress through the file, you can ensure your information is accurate by updating the Cover Sheet to follow the transaction progress.

Every time you reach a milestone with a new key signed contract (listing agreement, purchase agreement, closing), you should update the transaction cover sheet. This will ensure accurate due dates on your checklist, and it will also provide you with full access to the features which best suit your current file stage.

## Following File Progress

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Home | Transactions | Activities | Contacts | zipForm 6 Administration | Profile | Sign Out | Help

Jane Doe  
relay Training Brokerage  
866-736-7328  
odavis@ziplogix.com

Transaction ID 128297  
123 Main Street, City, ST 12345  
Closing Date:  
Buyer: None

Cover Sheet Documents Checklist Notes History

Jane Doe, you have full access to Listing Side of this transaction. Delete Transaction

Date created: 06/30/2009, 10:19 PDT Date last modified: 06/30/2009, 10:21 PDT

Transaction Detail. Connected with zipForm 6 transaction: 123 Main Street - LN 3241237

Edit Transaction Detail Sync from zipForm 6 Transaction Contacts Create Transaction CD

Property Information

Address 1	Address 2	City
123 Main Street		City

Sale Information

Transaction Created By	Transaction Type	Start Date:	Listing
Listing Side	Prospect		

Legal Description Listing Price Balance

	\$456,000.00	\$23,100.00
--	--------------	-------------

Assessor's Parcel Number Purchase Price Balance of Second Trust Deed

		\$2,313.00
--	--	------------

relay<sup>®</sup>

Update the transaction type from  
**Prospect** to  
**Listing** to  
**Purchase** to  
**Closed**  
...as it applies

The transaction type affects your access to features of relay<sup>®</sup>. For instance, if you are in a listing, you will not see Buyer contacts, since the buyer is not present in a listing.

## Thank You

More information:  
[www.zipLogix.com/relay](http://www.zipLogix.com/relay)

Sign in at:  
[www.relayLogin.com](http://www.relayLogin.com)

Support and training:  
<http://support.zipLogix.com>



Thank you for joining us in our training today! We hope it was educational.

Here are some helpful links for contacting relay® or your trainer today.