

# Document Loader Guide for *FlexMLS*

## A Word about Document Loader

The purpose of Document Loader is that it allows you to attach listing specific documents; such as the Sellers' Condition Report and the Lead Paint Disclosure, to your listing. You can accomplish this by uploading the file in PDF format through FlexMLS directly to your listing. The following pages will aid you with step-by-step instructions on how to do both.

## Basics of Document Loader

There are some basics to know about the Document Loader before beginning listed below:

- All documents that you upload **MUST** be in PDF format. **NO OTHER FORMAT IS ACCEPTED.** There are several ways to convert your document into PDF format. One way is through your scanner. Most scanners have an option in its software setting to convert your scanned documents into PDF format. Scan your document at lowest resolution possible. You must check your equipment's user manual to find out how on both. Another way is to download freeware called CutePDF Writer. You can download this software at no cost, by accessing the website [www.cutepdf.com](http://www.cutepdf.com).
- You can upload any of the documents listed in the Documents drop-down menu. If the document you are uploading is not in the list choose the Other option for your document name.
- **Recommended file size for uploaded documents is 10 MB or less per file.** This pertains to the size of the document after converting to PDF. To verify the size, simply single right click on the file name of the PDF document, single left click on Properties in the menu that will pop up, and take note of the size.
- To create a smaller PDF file, adjustments can be made to your scanner to create a smaller size, such as lowering the resolution (dpi) to its lowest setting, scanning as text as opposed to image, and scanning in black and white as opposed to color. You may also compress your created PDF file using a free compression tool available at [www.docupub.com/pdfcompress](http://www.docupub.com/pdfcompress).
- Listing Contract and Exclusive Right to Lease are private documents; this means they can **only** be seen by the listing agent and the listing office's administrative FlexMLS account.

## Step One: Adding a Document to Your Listing

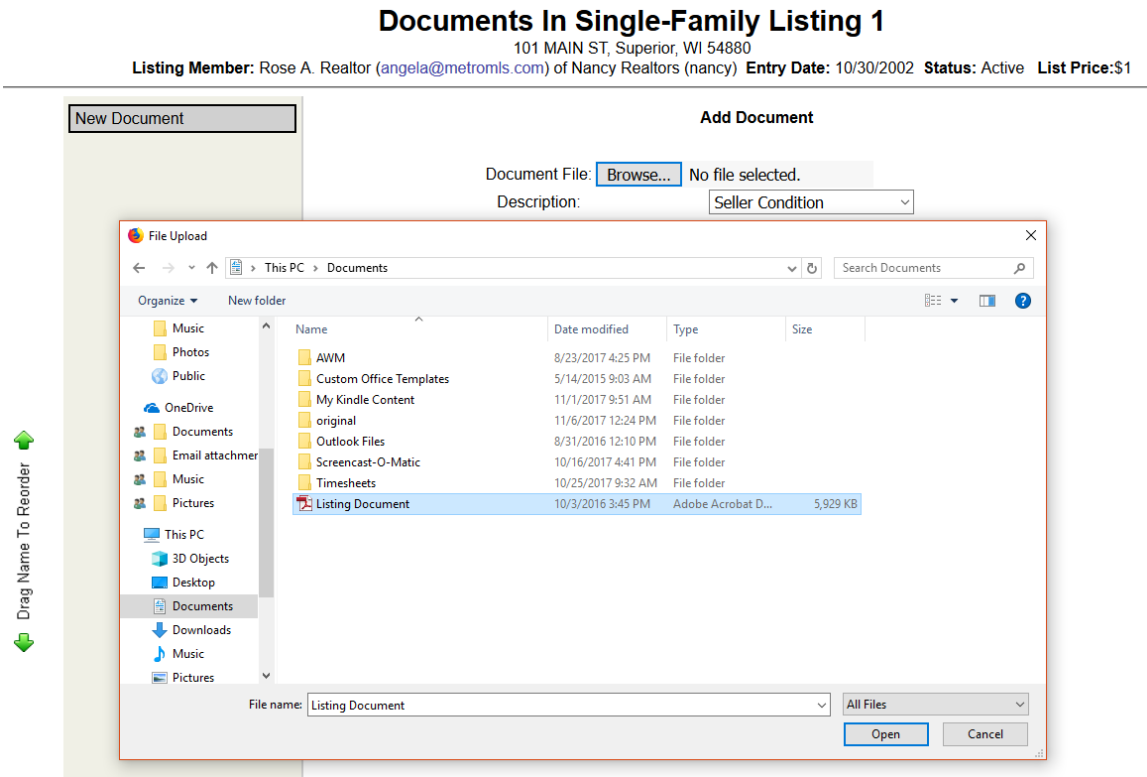
To add a document to your listing, click on the Menu button. Under the Add/Change section click the **Change Listing** link. Enter or select your listing's MLS number and click the **Next** button. This will bring you to the Change menu for that listing, as shown below.

The screenshot shows a web interface for managing a real estate listing. At the top, there's a navigation bar with links: FULL LISTING REPORT, PHOTO TOUR, DOCUMENT VIEWER, HISTORY, ACTIVITY, and CHANGE ANOTHER LISTING. Below this, the listing address is 101 MAIN ST, Superior, WI 54880. A line of text provides details: Listing Member: Rose A. Realtor (angela@metromls.com) of Nancy Realtors (nancy), Entry Date: 10/30/2002, Status: Active, List Price:\$1. The main area is divided into two columns. The left column has a 'General' section with links for Listing Information, Map Location, and Listing/Selling Members. Below that is a 'Status' section with links for Edit Current Status (Active), Extend or Expire Listing, Pend Listing (Under Contract), Close Listing, Withdraw Listing (Temporary), and Expire Listing. The right column has a 'Price' section with a Change List Price link. Below that is a 'Media' section with links for Photos (1), Documents (highlighted in yellow), Videos, and Virtual Tour. At the bottom right is a 'Scheduled Marketing Activities' section with links for Open House and Tour of Homes.

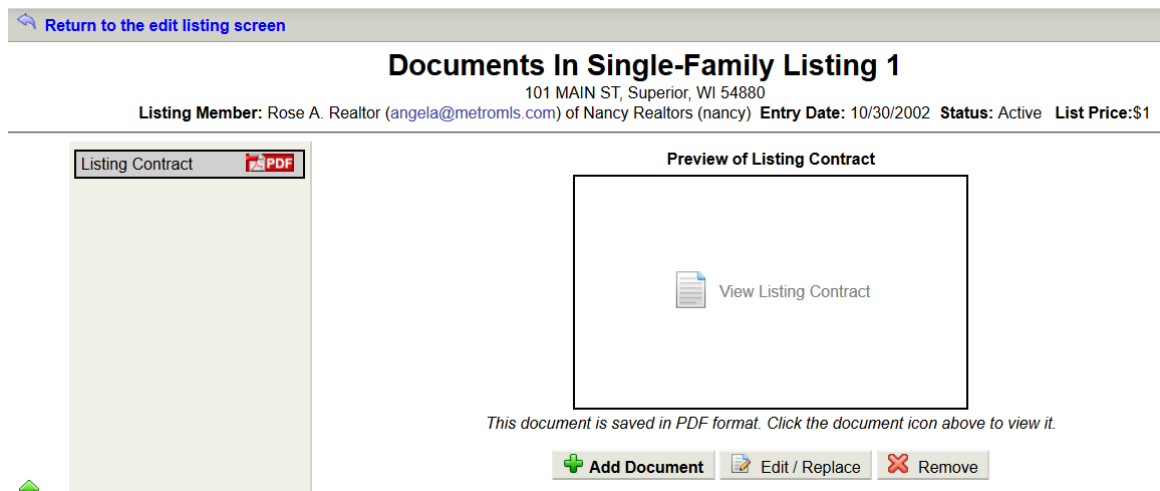
Under the Media section, click the **Documents** link. This will bring you to the Documents menu for that listing, as shown below.

The screenshot shows the 'Documents In Single-Family Listing 1' page. At the top, there's a link to 'Return to the edit listing screen'. Below this, the listing address is 101 MAIN ST, Superior, WI 54880. A line of text provides details: Listing Member: Rose A. Realtor (angela@metromls.com) of Nancy Realtors (nancy), Entry Date: 10/30/2002, Status: Active, List Price:\$1. The main area is divided into two columns. The left column has a 'New Document' button. The right column has an 'Add Document' section. In this section, there's a 'Document File' label, a 'Browse...' button (highlighted with a red box), a 'No file selected.' message, a 'Description:' label, a 'Seller Condition' dropdown menu, and an 'Add' button.

In the 'Description' field, click the drop-down arrow and select the type of document you want to upload. Then click the **Choose File** or **Browse** button. This will bring up the **Open** or **Choose File** window that allows you to browse your file locations. Point this box to the location of the file you would like to upload, as shown below.



Highlight your file of choice and click the **Open** button. This will pull the file into the Browse box. Now click the Add button. After successful addition of your document, your screen should look like the example shown below.



## Editing/Replacing an Existing Document

You have the ability to edit/replace existing documents you have loaded in the Documents feature. If you need to replace an existing document with a more current or corrected version, in the Documents menu, click the document to be replaced in the list of documents on the left side of the screen. Then click the **Edit/Replace** button. This will bring you to a screen showing you an icon of the selected document. Place a check in 'Replace Document' check box. The **Browse** or **Choose File** button will appear. An example of the screen is shown below.

Documents In Single-Family Listing 1

101 MAIN ST, Superior, WI 54880

Listing Member: Rose A. Realtor (angela@metromls.com) of Nancy Realtors (nancy) Entry Date: 10/30/2002 Status: Active List Price:\$1

Listing Contract PDF

↑ reorder

Preview of Listing Contract

View Listing Contract

Description: Listing Contract

☒ Replace Document

Browse...

No file selected.

Save Changes

Cancel

Click it to browse for your new document, select the document name, and click the **Open** button to pull it into the Browse field. Now click the **Save Changes** button to save your new document.

## How to Access Documents on a Listing

To access documents on a listing, select your desired listing, click on the Detail tab, and then click the **Documents** link. If the listing has documents attached, the link will be present, as the example screen shows below.

Search Results *work on behalf of a contact*

Save E-Mail Print CMA Export ShowingCart

5

Results: 47 Selected: 0

Price | Status | MLS #

**\$242,000**  
7412 N Longacre RD  
Fox Point, WI 53217-3504  
Active / 1536900

**\$249,900**  
7614 N Seneca Rd  
Fox Point, WI 53217-3142  
Active / 1541412

**\$259,000**  
8214 N Regent RD  
Fox Point, WI 53217-2734  
Active / 1547274

**\$259,500**  
7418 N Boyd Way  
Fox Point, WI 53217-3650  
Active / 1546717

**\$269,500**  
217 E Spooner Rd  
Fox Point, WI 53217-2745

Edit Search List Detail Photos Map Compare Messages

Report History Tax Info Mortgage Info **Documents** more

Address: 7412 N Longacre RD Fox Point, Wisconsin 53217-3504 Taxed by: Fox Point MLS #: 1536900

Property Type: Single-Family  
Status: Active With Offer  
Start Showing Date: 07/06/2017  
Tax Key: 0960041000  
County: Milwaukee

List Price: \$242,000  
Taxes: \$5,280  
Tax Year: 2016  
Est. Acreage: 0.2

Bedrooms: 3  
Total Full/Half Baths: 1 / 1  
F/H Baths Main: 1 / 1  
F/H Baths Upper:  
F/H Baths Lower:  
Garage Spaces: 1  
Garage Type: Attached

Rooms: 6  
Est. Total Sq. Ft.: 1,490  
Est. Year Built: 1947  
Zoning: RES

Flood Plain: No Days On Market: 97

Directions: Calumet to Bell, South to Lombardy, Turn left to property OR Lake drive to Bell to Lombardy, north to property

| Name           | Dim     | Level | Name              | Dim     | Level |
|----------------|---------|-------|-------------------|---------|-------|
| Master Bedroom | 15 x 14 | Main  | Living/Great Room | 19 x 15 | Main  |
| Bedroom 2      | 13 x 10 | Main  | Kitchen           | 14 x 10 | Main  |
| Bedroom 3      | 10 x 9  | Main  | Family Room       | 18 x 13 | Main  |
|                |         |       | Rec Room          | 32 x 10 | Lower |

Lot Description: Fenced Yard  
Style: 1 Story  
Architecture: Ranch  
Garage: Electric Door Opener  
Driveway: Paved  
Exterior: Aluminum/Steel  
Basement: Full, Block; Sump Pump; Partial Finished  
Heating Fuel: Natural Gas  
H/C Type: Forced Air; Central Air  
Bath Description: MBR Bath Shower over Tub; At least one Bathtub; Ceramic Tile

Terms/Misc: Home Warranty  
Documents: Seller Condition; Tax Bill; Prior Title Policy; LeadPaint Disclosure; Other; Listing Contract; Seller Updates  
Appliances Incl.: Oven/Range; Refrigerator; Disposal; Dishwasher; Microwave; Washer; Dryer  
Misc. Exterior: Deck  
Misc. Interior: Natural Fireplace  
Water/Waste: Municipal Water; Municipal Sewer  
Municipality: Village

Clicking on the **Documents** link in the Detail tab will take you to Document Viewer menu. In this menu, you have the options to view and/or print the documents; either one at a time, or all at once. Below, is an example of the Document Viewer screen.

Search Results *work on behalf of a contact*

Save E-Mail Print CMA Export ShowingCart

5

Results: 47 Selected: 0

Price | Status | MLS #

**\$242,000**  
7412 N Longacre RD  
Fox Point, WI 53217-3504  
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Edit Search List Detail Photos Map Compare Messages

Report History Tax Info Mortgage Info **Documents** Open House more

**Documents**

- ☐ [Seller Condition](#) (Public)
- ☐ [LeadPaint Disclosure](#) (Public)
- ☐ [Other](#) (Public)

[View/Print Checked Documents](#)

**NOTE:** The Documents link will only appear if documents are loaded onto a listing. If the listing does not have a document attached, this link will not be available. Listing Contracts and Exclusive Right to Lease are private documents and cannot be seen by anyone other than the listing agent and the listing office's accounts.