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SkySlope Training Manual

Transaction Management Made Simple

SkySlope™ Training Manual

Brad DeVries
President & CEO
HomeServices of Kentucky

Skyslope™ is called a transaction management system. Sounds complicated already! Skyslope™ is hosted in the cloud. Now it sounds complicated, techie and confusing! With this manual, we hope to lessen the perceived complexity and reduce any confusion you may have about this system.

The Semonin real estate services company is required to keep many records of the thousands of transactions we handle each year. We are required to keep those records for many years as a normal part of our business. You, as a real estate agent, are also required to keep records of the transactions in which you are involved.

Collectively at Semonin, we feel the Skyslope™ system is the best system to allow both brokerage and agents to save all the thousands of files needed for the thousands of transactions we process each year. Regulation is part of our real estate lives. This regulation expects proper record keeping to be in place. It is a complicated process and the reason we exist for buyers and sellers in the marketplace. This system will increase our professionalism and our efficiency as business owners.

This system is our "electronic inbox" for Semonin paperwork. Whether you have a listing contract or a sales contract, this is where the paperwork processing begins for our company. Our investment in learning this system will benefit our buyers and sellers. Our investment in understanding this system will make us better business owners and professionals.

We are excited to offer this manual as an additional Semonin resource to learn and embrace this transaction management system hosted in the cloud.

Best wishes for your success,

Brad DeVries

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This training manual is dedicated to the memory of Jack Hill.

TRAINING OVERVIEW

SkySlope is a Transaction Management System that incorporates Unlimited Cloud Storage, Electronic Signatures, Secure Access, Tasks and Management Access. With iPad and iPhone Compatibility you are able to access your files while on the go!

Using the built-in Checklist feature your Support Staff will be able to access, approve or reject contract documents in an instant. With DigiSign you are able to send any PDF off for digital signatures with a few clicks of your mouse.

Possibly one of the best features is their Support Team, who are available 24/7/364 via online chat, email, or phone calls. The Support Team works in the same building as the rest of the team, inside the US.

To quote SkySlope "SkySlope is here to simplify and streamline your real estate business. Our support is here 24/7 for everything else."

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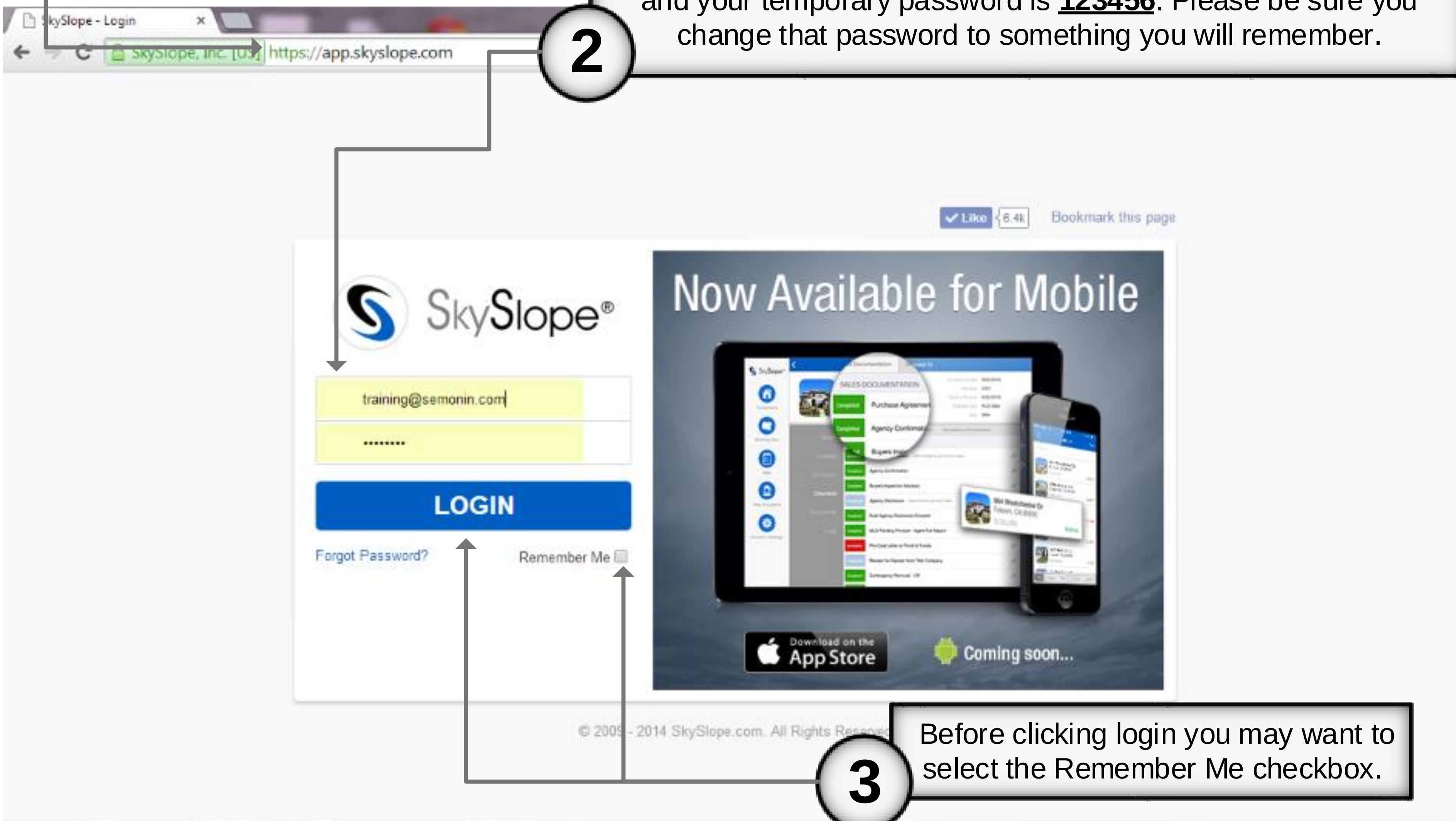
1

To begin working with SkySlope you will need to access the login page at **App.SkySlope.com**.
If you go to SkySlope.com there is a login button at the top of the screen.

2

Once there you will use your Semonin email as your Username and your temporary password is **123456**. Please be sure you change that password to something you will remember.



3

Before clicking login you may want to select the Remember Me checkbox.

SkySlope's Homepage is built with 10 main buttons. First lets discuss what they all do.

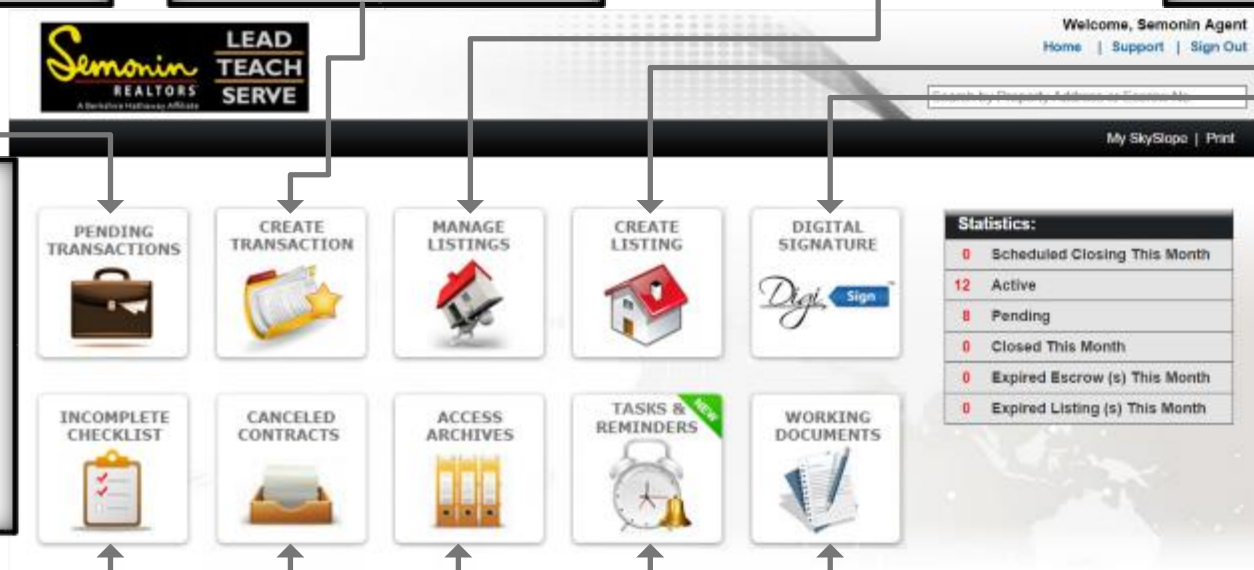
Pending Transactions: Access Pending Contracts you have already started on SkySlope.

Create Transactions: Begin working a Pending Contract. ONLY when you are not the Listing Agent.

Manage Listings: Work with Listings you have already started in SkySlope.

Create Listing: Begin working a new Listing, this will be where you turn in new listings.

Incomplete Checklist: See which Listings and Transactions have Checklist Items that still need to be added or Assigned.



Digital Signature: DigiSign is a digital signature software that allows you to send any document via email to be signed, initialed and dated.

Canceled Contracts: Any Withdrawn or Canceled Listing or Transaction in SkySlope.

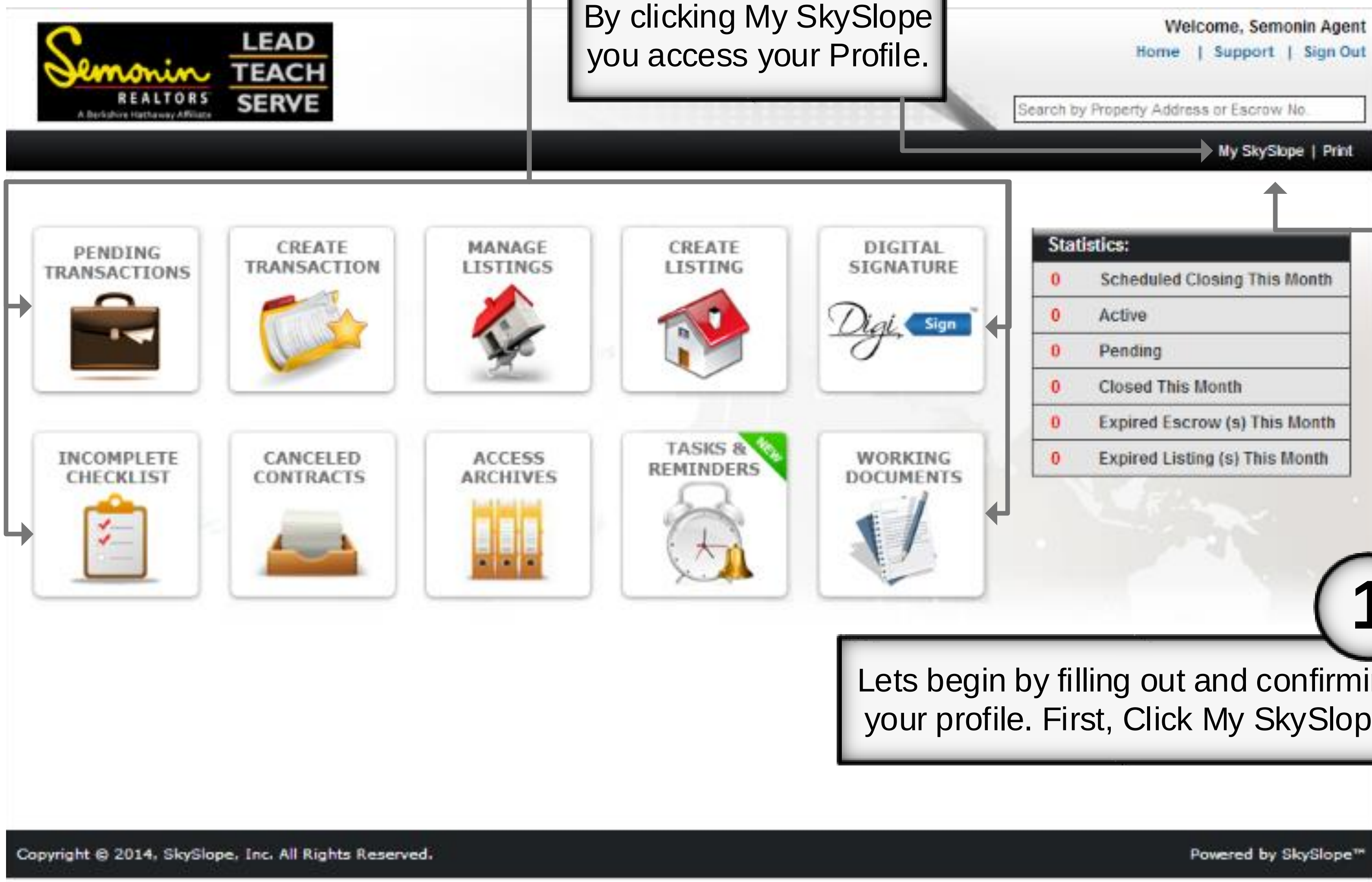
Access Archive: Access your Closed Listings and Transactions in SkySlope.

Tasks & Reminders: Access your Tasks Dashboard, as well as create new Task Templates.

Working Documents: A section that allows you to upload Documents that aren't associated with a Listing or Transaction.

Once logged in you will see the SkySlope Homepage, also known as the Dashboard. Here you have buttons to Create a New Listing, Manage a Listing, Create a Transaction (Sale), Manage Pending Transactions, Start a Digital Signature process, View Incomplete Checklists, Access Canceled Contracts, Access Archives, View Tasks and Reminders, or Access Working Documents.

By clicking My SkySlope you access your Profile.



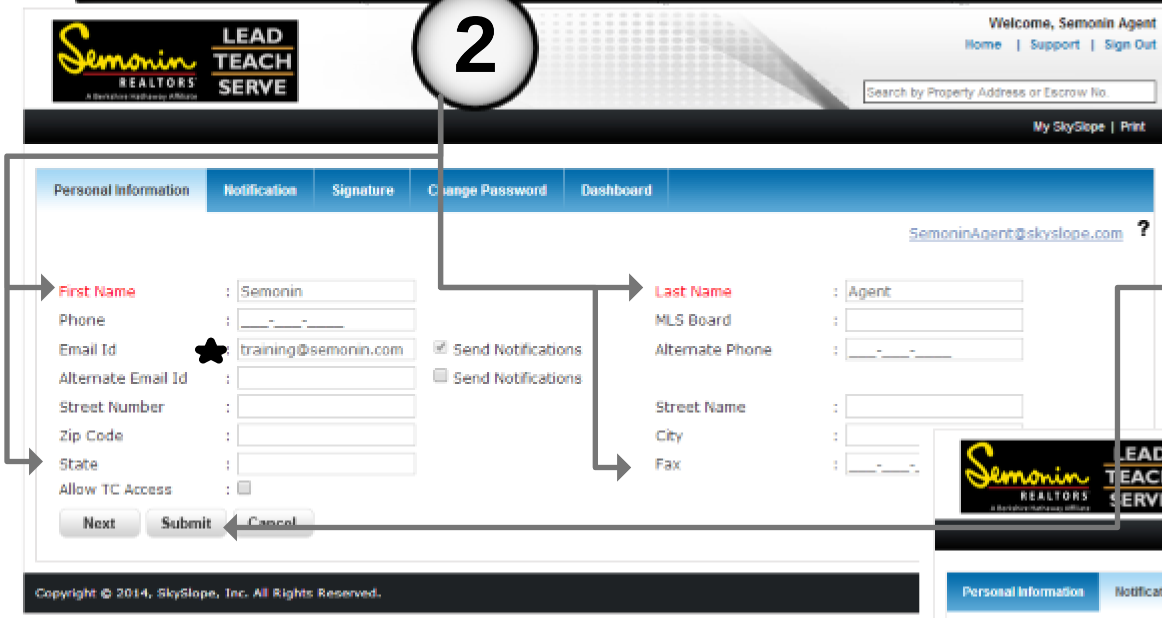
1

Lets begin by filling out and confirming your profile. First, Click My SkySlope.

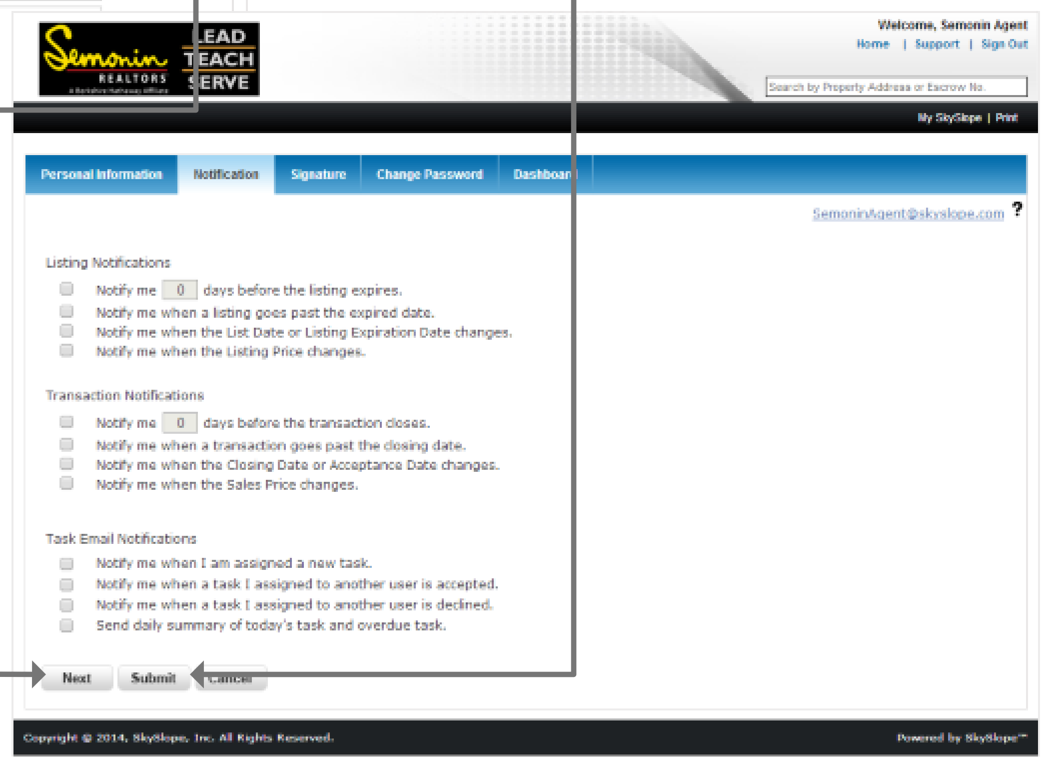
The first page of My SkySlope is your Personal Information. Confirm all the information on this page before clicking Next to move on.

If you change the Email Address in SkySlope's Profile you will use the NEW Email to Login.

2

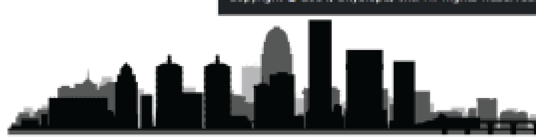


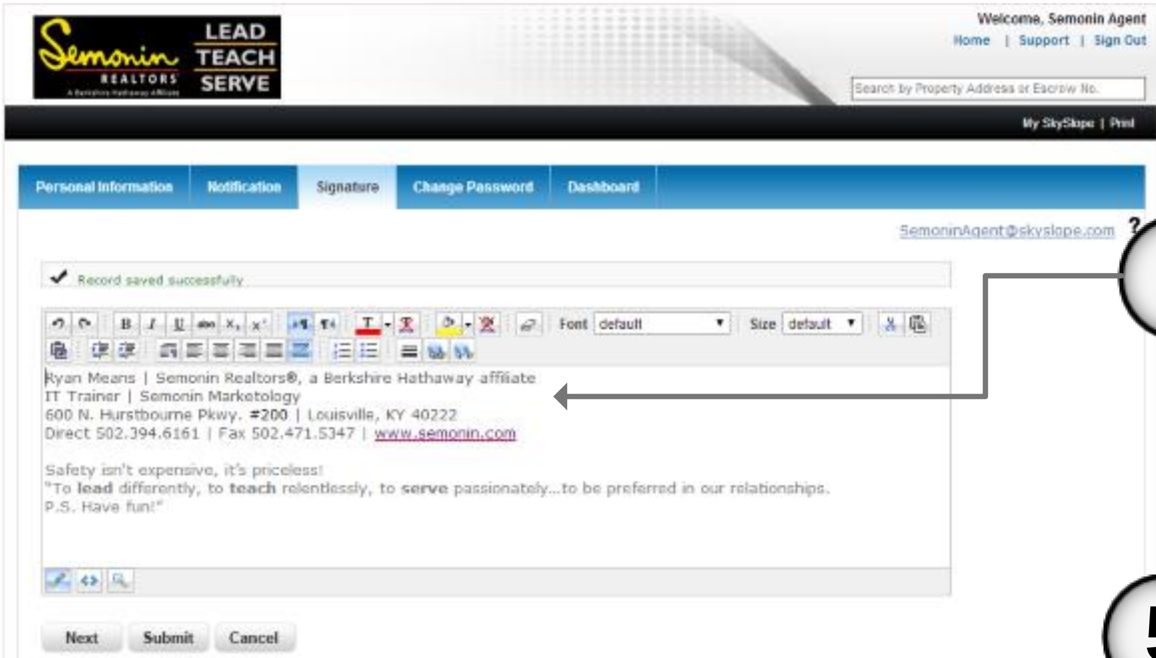
If you make ANY changes on ANY Profile Info Pages, please click Submit to Save those changes before clicking Next to move on.



Next are your Notification settings. SkySlope does not turn any notifications on by default, but you can be notified about expiring listings, closings, price changes, dates and certain task items. Once you have these set the way you want, click Submit to save changes or Next to continue.

3





4

Next we need to add an Email Signature. For this I recommend you copy and paste from your Semonin Email Signature, if you have one setup. If not, please include: Your Name, Title, Semonin Realtors®, a Berkshire Hathaway affiliate, the Office Address, and your Contact Info.

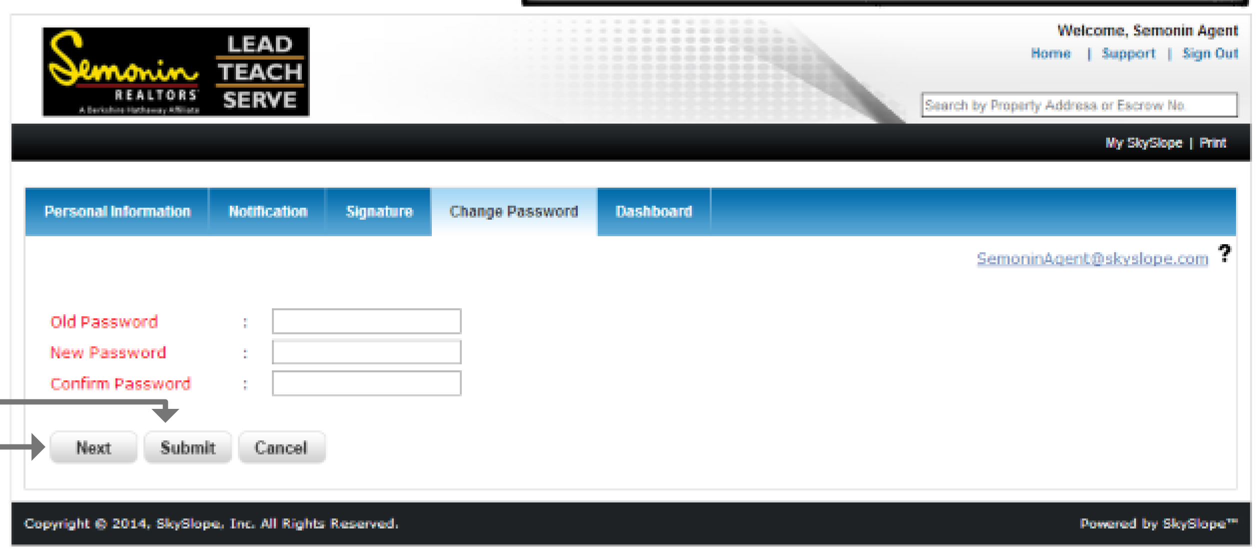
On a PC hold Alt and type 0174 to add the ® to Semonin Realtors

5

Once you have setup your Email Signature, click Submit to save it, then click Next to Continue.

Next you should setup your personal password for SkySlope. First type the old password (123456) then create and confirm the new password.

6

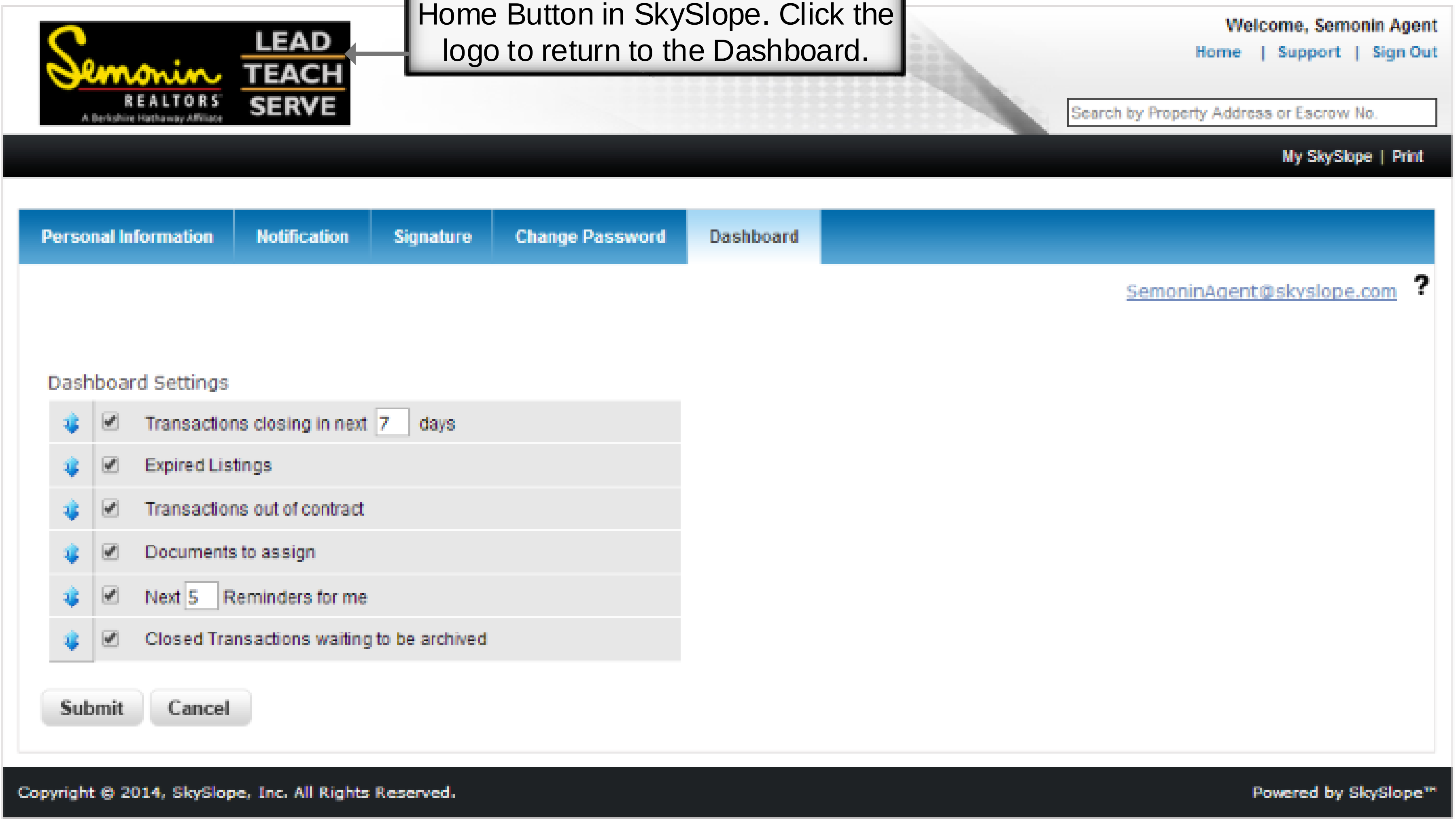


7

Once you have entered it, click Submit to save it, and Next to continue on.

The final page of Settings relate to the Dashboard, or Homepage, of SkySlope. These will not typically be changed, although there may be some additional options in the future.

The Semonin Logo is always the Home Button in SkySlope. Click the logo to return to the Dashboard.



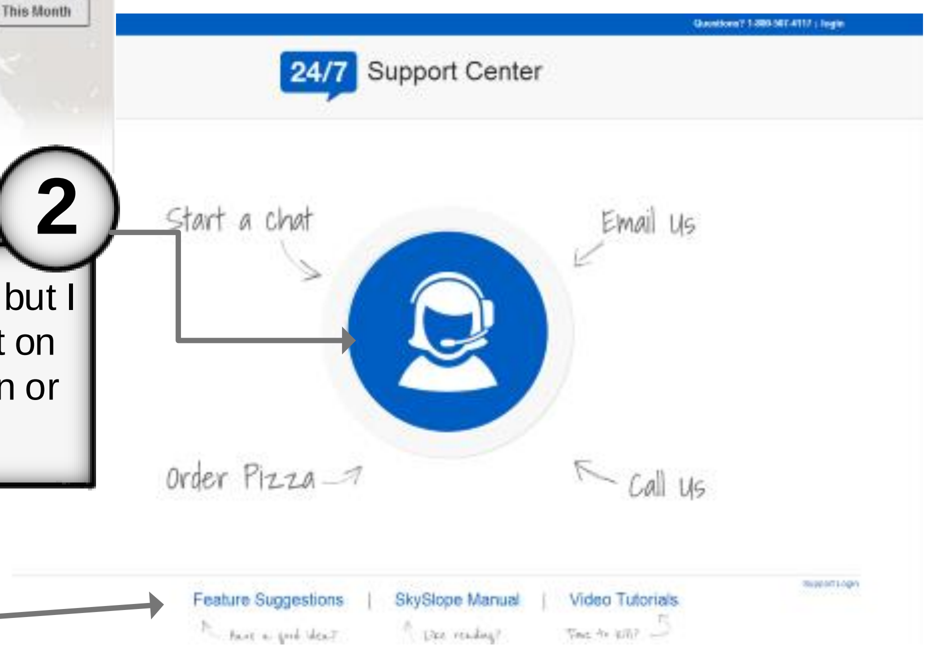
As we all know, one of the most important features of any new software is their support. Some would even say that software is only as good as its support. SkySlope has top notch support. First, they are open 24/7/364 (they get one day off a year), and the entire support team works in the same California office as the rest of the SkySlope Team! Not only are they trained to be experts on the SkySlope software, but they are also trained in the complexities of Real Estate transactions, so they are a one-stop-shop for getting the help you need!

1

To get help from SkySlope's Support Team, simply Click Support at the top of any page!

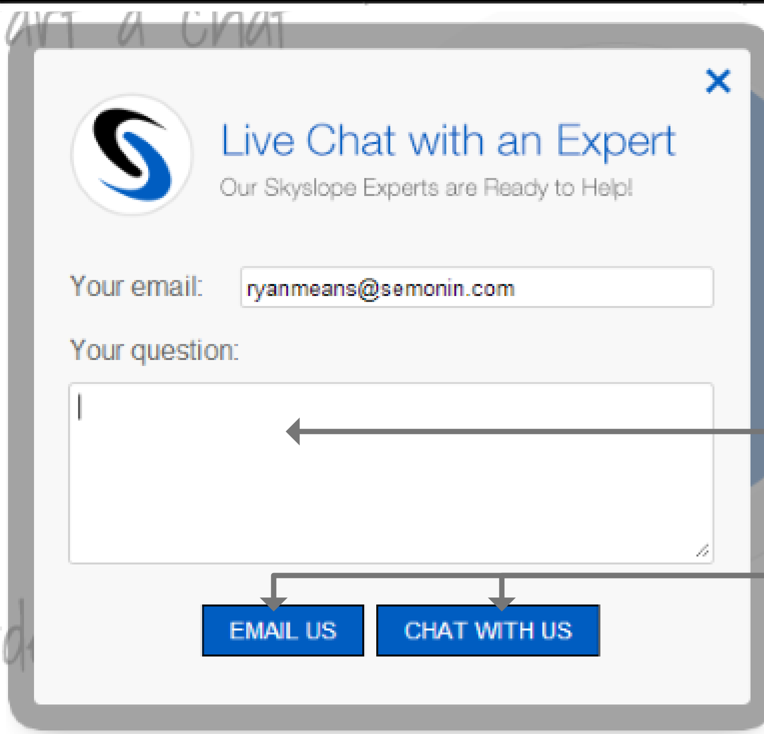
2

SkySlope Support does have a Manual and Video Tutorials, but I only recommend using those if you happen to need support on the one day a year they are closed. For almost any question or issue I recommend clicking the big blue Support button.



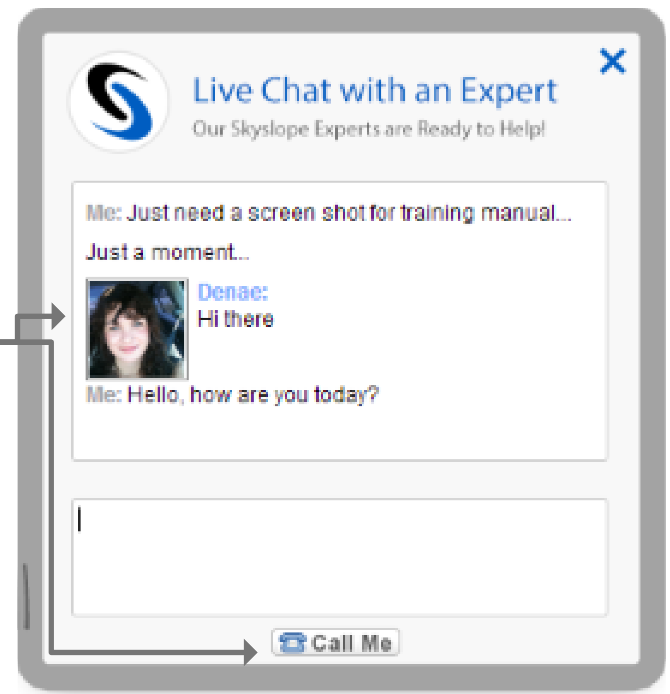
There is also a section to Suggest Features, if you have an idea you'd like to pass along.

Once you click the Big Blue Support button you will get a window that shows your email address, and asks "Your Question". If you do not need an immediate answer you can click Email Us once you type your question, but since they are open 24 hours a day, clicking Chat With Us is always the fastest way to get a response.



3 Type your Question or Issue.

4 Click to Email or to Instantly Chat.



5

Once you initiate the chat you will see a picture and name of the Support Agent who is assisting you. If you feel that typing isn't going to get the point across you can simply click Call Me to have that same support agent call you at the number saved in your profile.

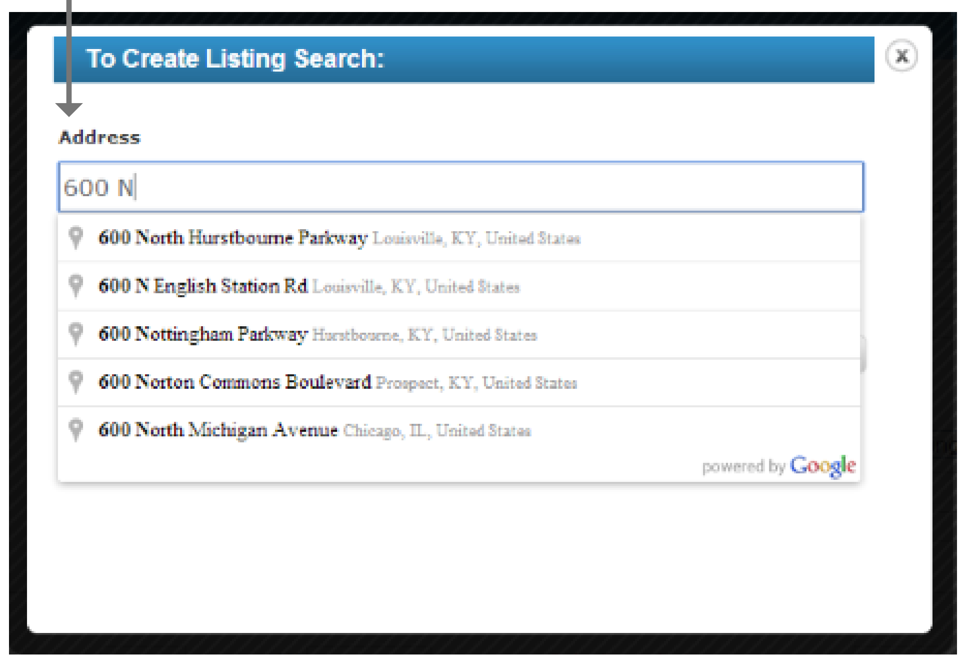
Create Listing

To begin working with a new Listing we first want to click Create Listing from the Dashboard. This is not linked to the MLS in any way, so it is not actually creating a listing in the MLS, it is simply creating a listing folder to manage all your listing documents.

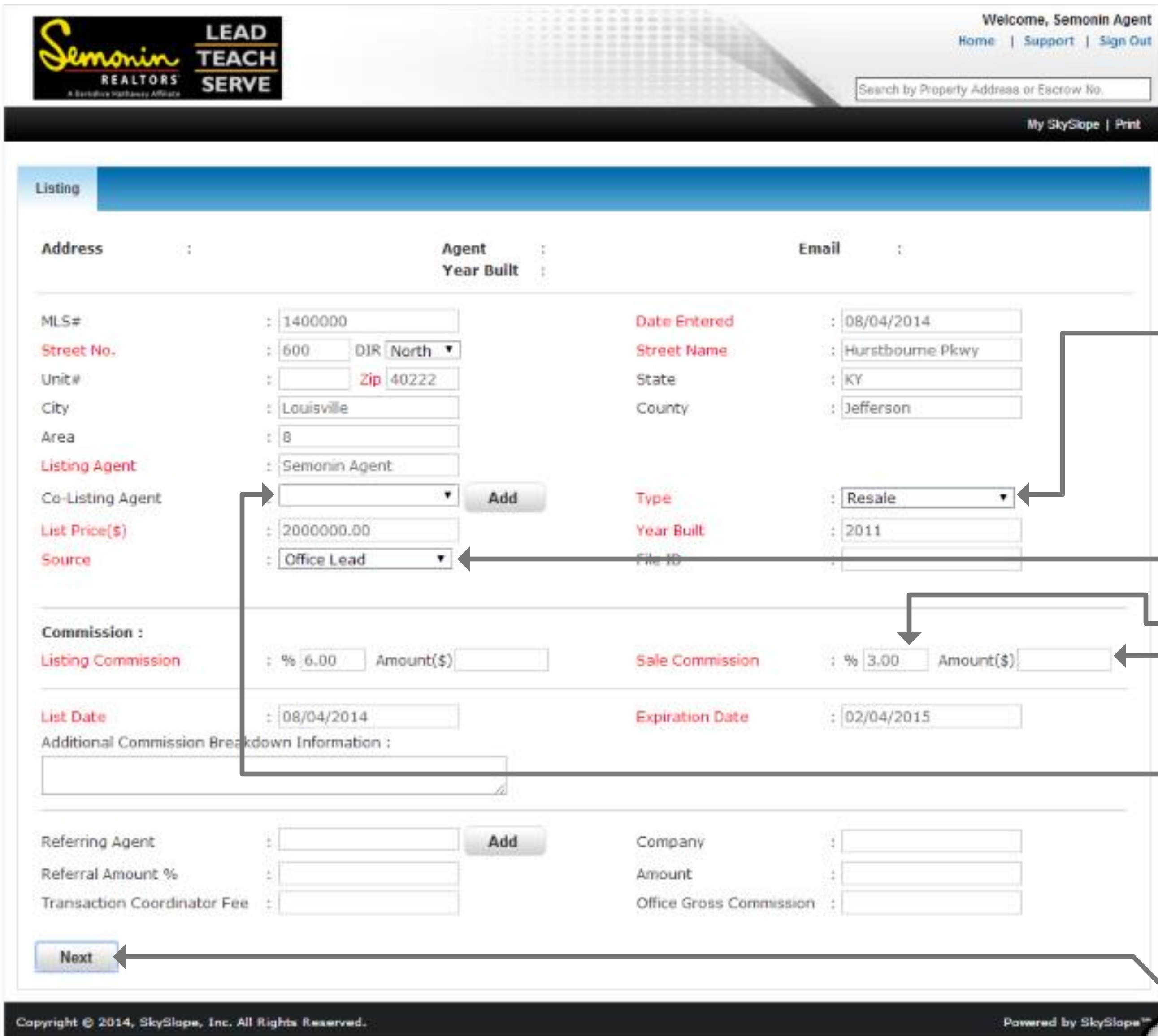
1

SkySlope added a Google Map search function to the Create Listing process to allow you to quickly auto-fill a few of the data fields. Put as much or as little of the information in as you want.

2



There is also a space to search via MLS #. As of the time of this training manual that section didn't work properly, and since it will only pull address info, I currently would recommend the Google Map Search function.



While most of the Listing Information is obvious, the "Type" is one field you need to be sure you pay attention to. Unless your listing is New Construction, it will almost always be a Resale.

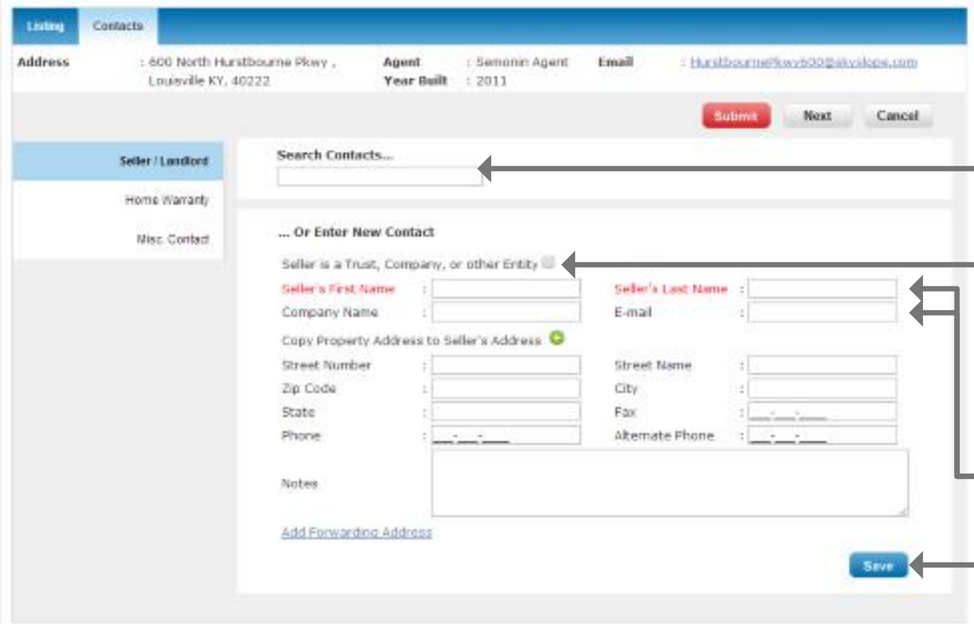
The Source is where you got the listing, choose whichever most closely applies, or choose Other to type your own Source.

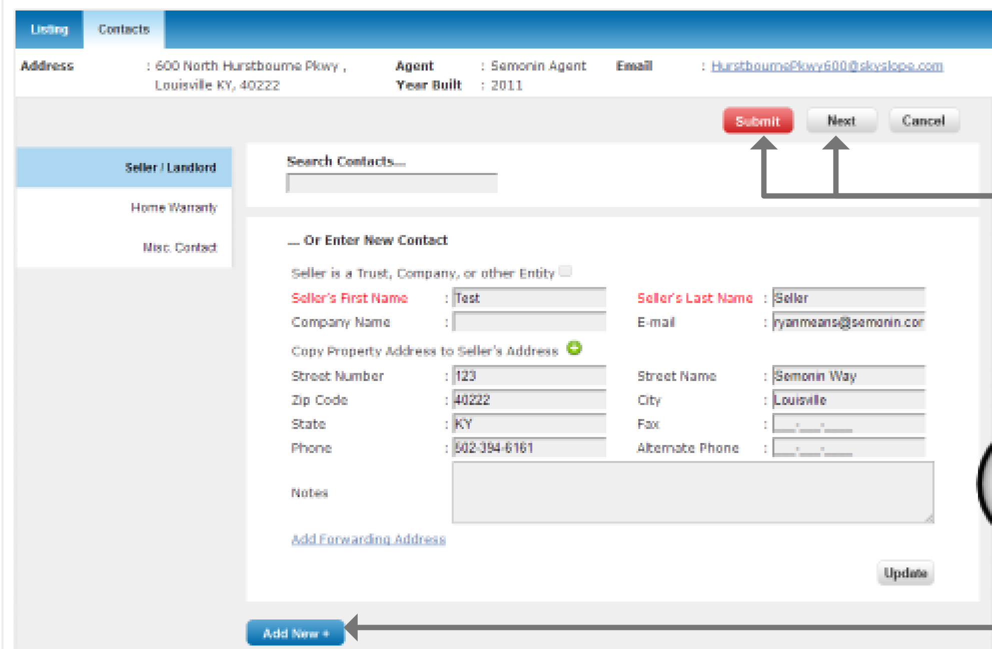
Commissions can be either a Percentage or a Flat Rate, for Flat Rate, use the Amount box.

If you add a Co-Listing Agent they will also get access to this Listing, all it's documents, and tasks in the SkySlope system.

3

To Create a Listing you need to fill in all the fields you can. Any field in **Red** is a Required Field. Once you have entered all the information you can, click Next to move to the next page.





You can Search for a Contact you've previously used.

The Second step of Creating a Listing is to add contacts. The first Contact is always the Seller. Your Seller can be a Trust, Company or Other Entity if needed.

4

At the very least you need Seller's Names, but I recommend you add their email address and phone number as well.

5

Once you have added the first seller's information, click Save to save the details.

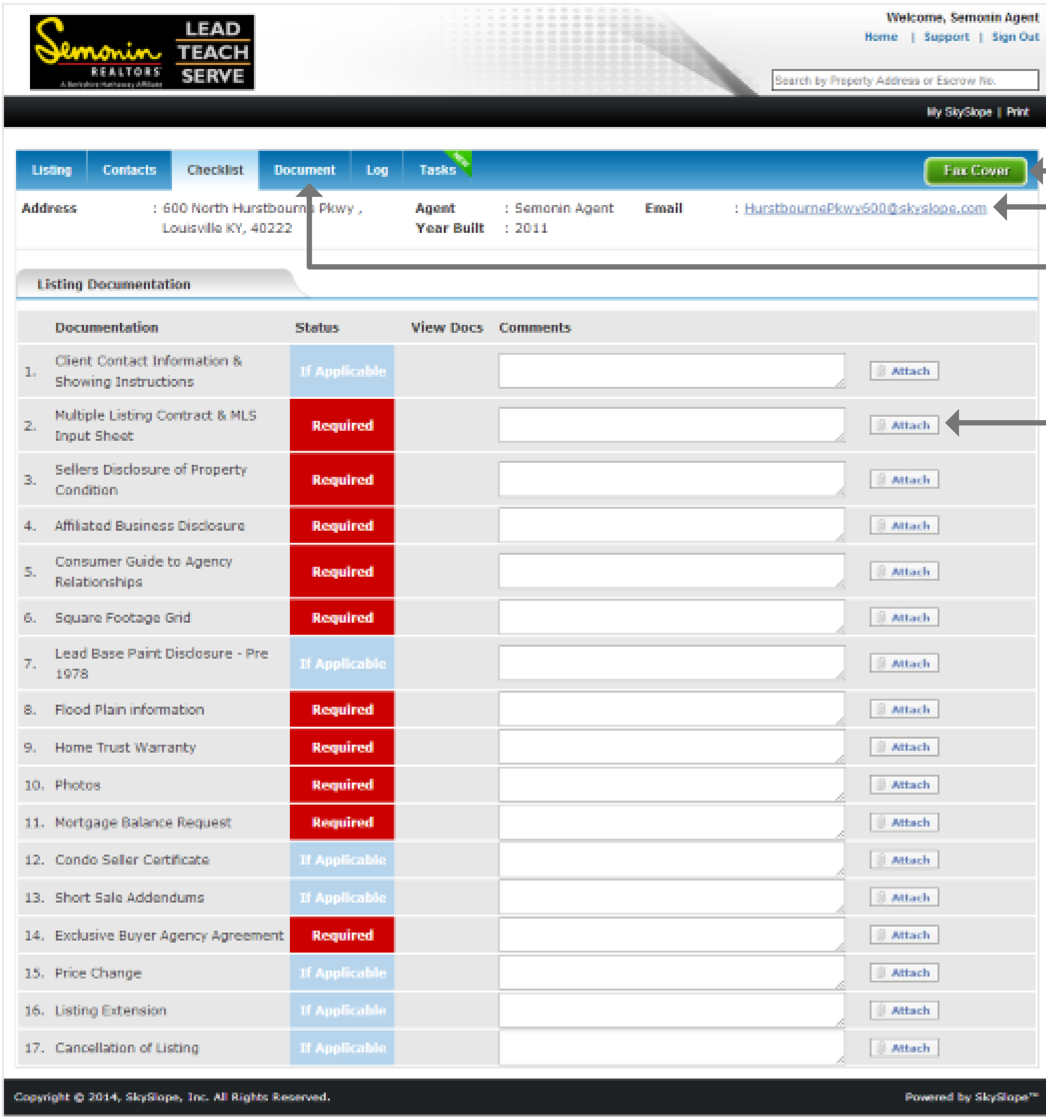
7

If you have other contact types you can click Next, or Click Submit to move to the Checklist section of the Listing.

6

Once you have saved the First Contact, you can add another by clicking Add New.

Another great feature of SkySlope is the Checklist section. This is customized for Semonin, for each transaction type and for each MLS. It is like a digital version of the checklist we have now, except without submitting ALL required documents you cannot finalize this listing. There are many ways to get the documents to the particular checklist items, so we will discuss those methods now.



~ **Fax Forms**

SkySlope can create a Fax-Cover-Sheet that will allow you to fax any documents you have directly to this transaction, either individual or combined. Combined is recommended as each Fax-Cover-Sheet is **only good for one fax**.

~ **Email Forms**

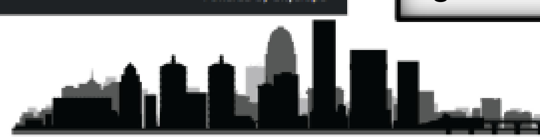
Using the Email Address SkySlope generates for each individual transaction/listing you can email any documents you want, either individual or combined.

~ **Direct Upload of Combined Forms**

Using the Documents Page you can upload one PDF document containing all pages of the contract, then using a built in splitting function you can separate that PDF into each individual checklist item.

~ **Direct Upload of Individual Forms**

Forms can be uploaded directly to the document checklist via the “Attach” button to the right of the Comments Section.



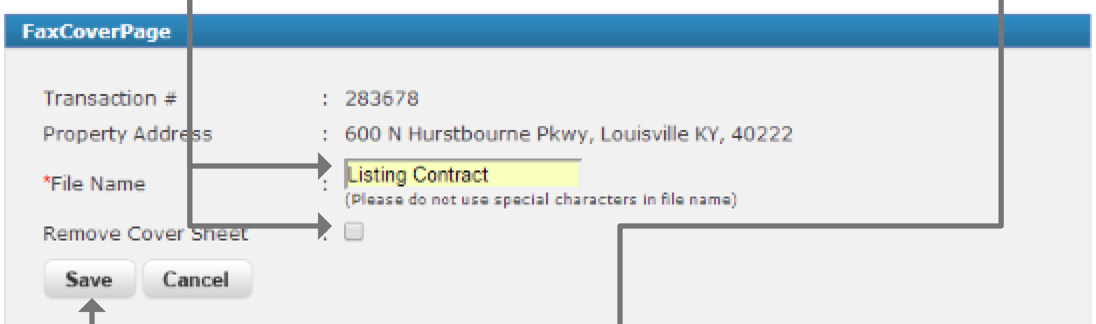
1 By Clicking "Fax Cover" in the top right of the Checklist a new window pops-up.

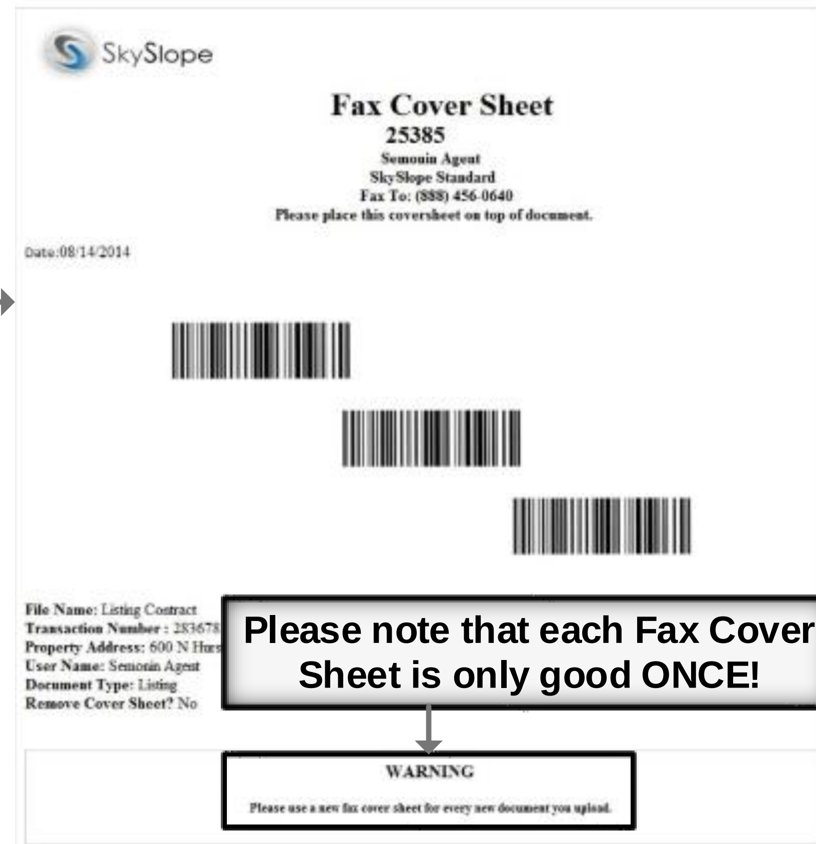
The new window asks for a File Name and if you want the system to remove the faxed cover sheet.

2

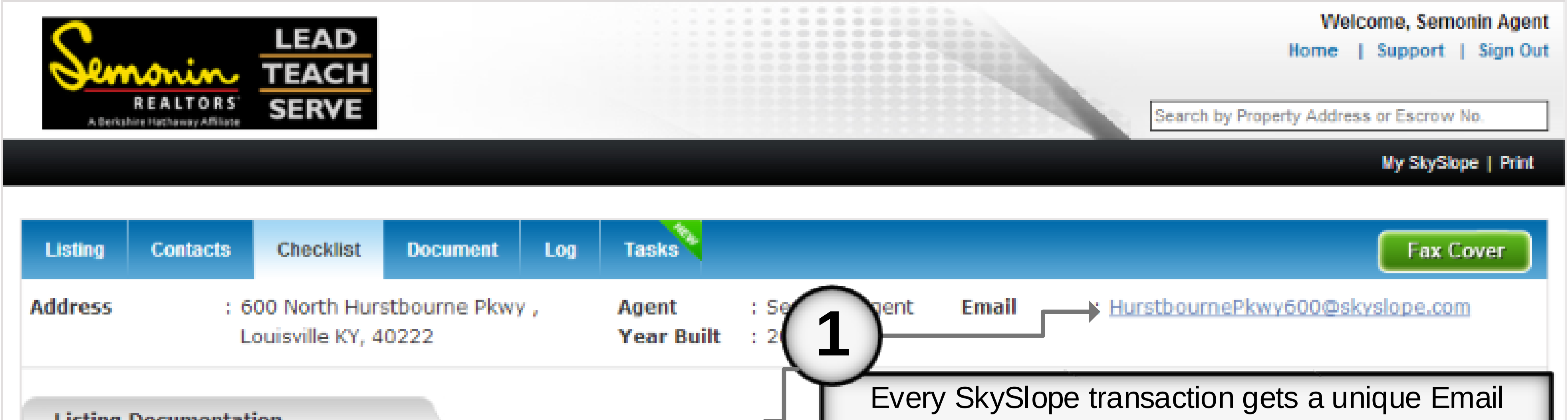
Click save to generate a PDF of the fax cover sheet.

3



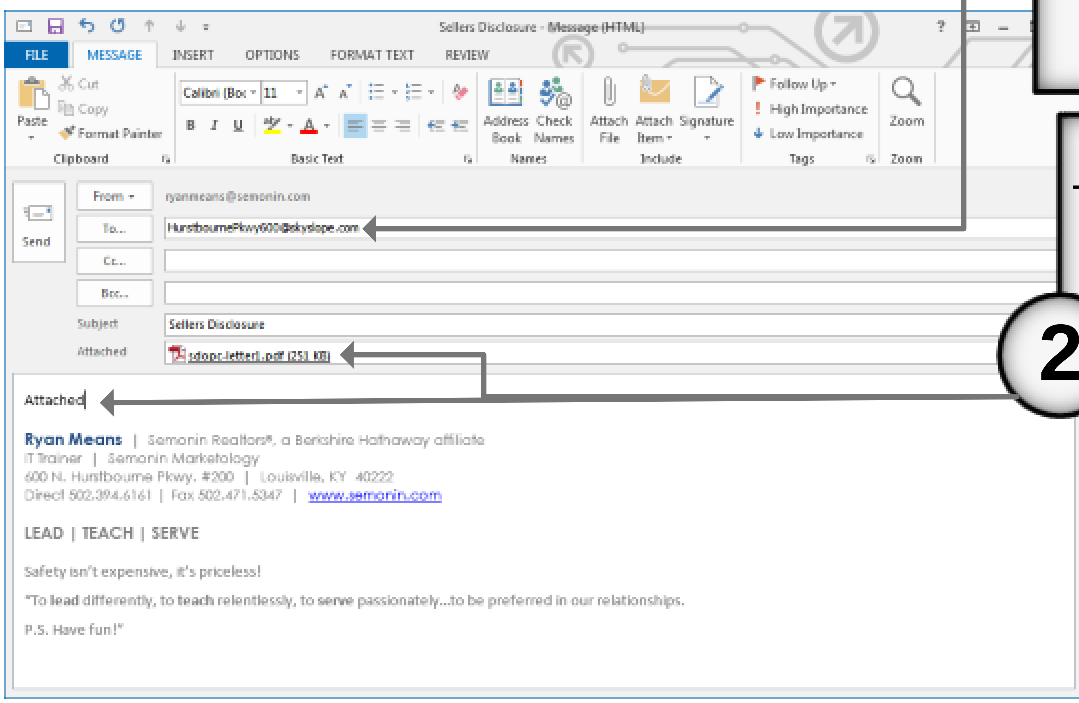


Please note that each Fax Cover Sheet is only good ONCE!



1

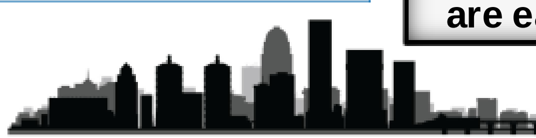
Every SkySlope transaction gets a unique Email Address, which is displayed near the top of the Checklist and Documents pages. To upload Documents via email, simply send them as attachments to that Transaction's email address.

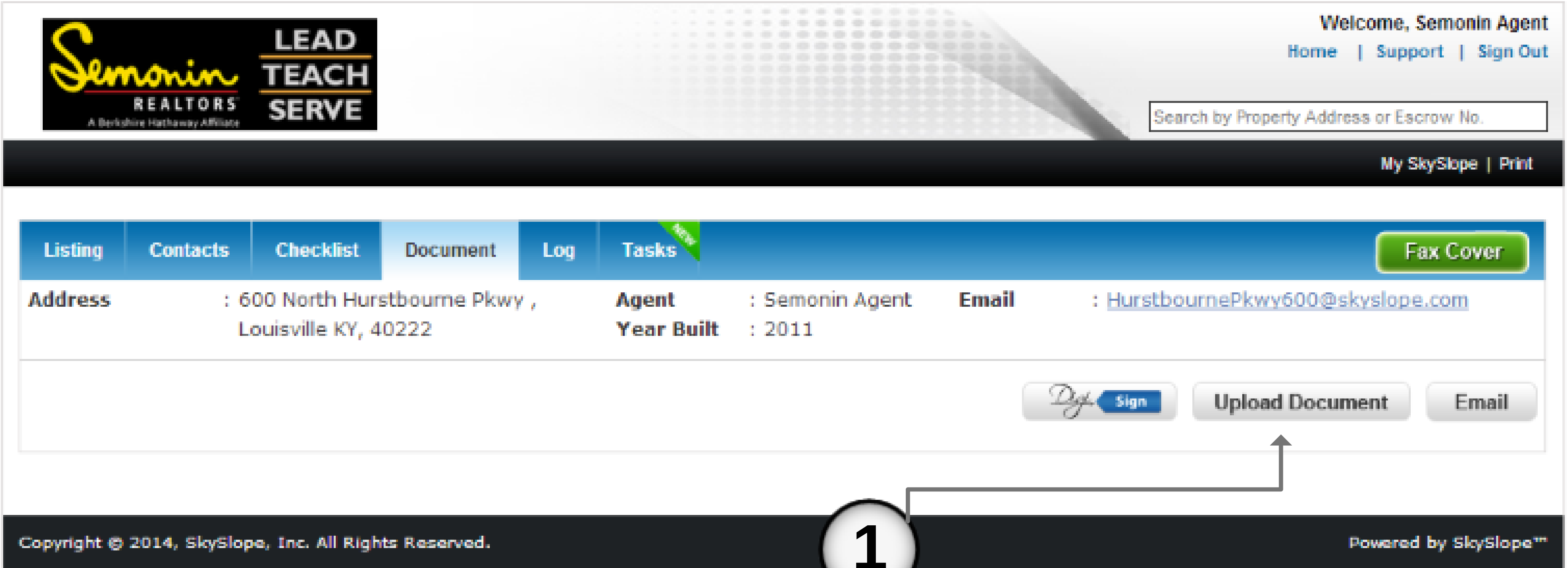


Anything sent via email to the SkySlope Transaction's Email Address will be stored, the body of the email is saved in the Log section, while all attachments are saved in the documents section.

2

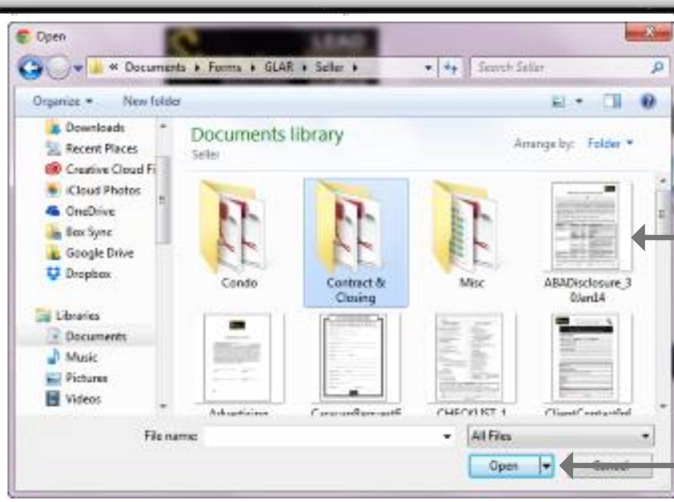
Any email can be forwarded to SkySlope, if an email has an attachment it will save to the Documents section and remain attached to the email that is placed in your Log. It is recommended that you forward ALL emails pertaining to a contract/transaction so they are easily accessible for the 5-year period.





1

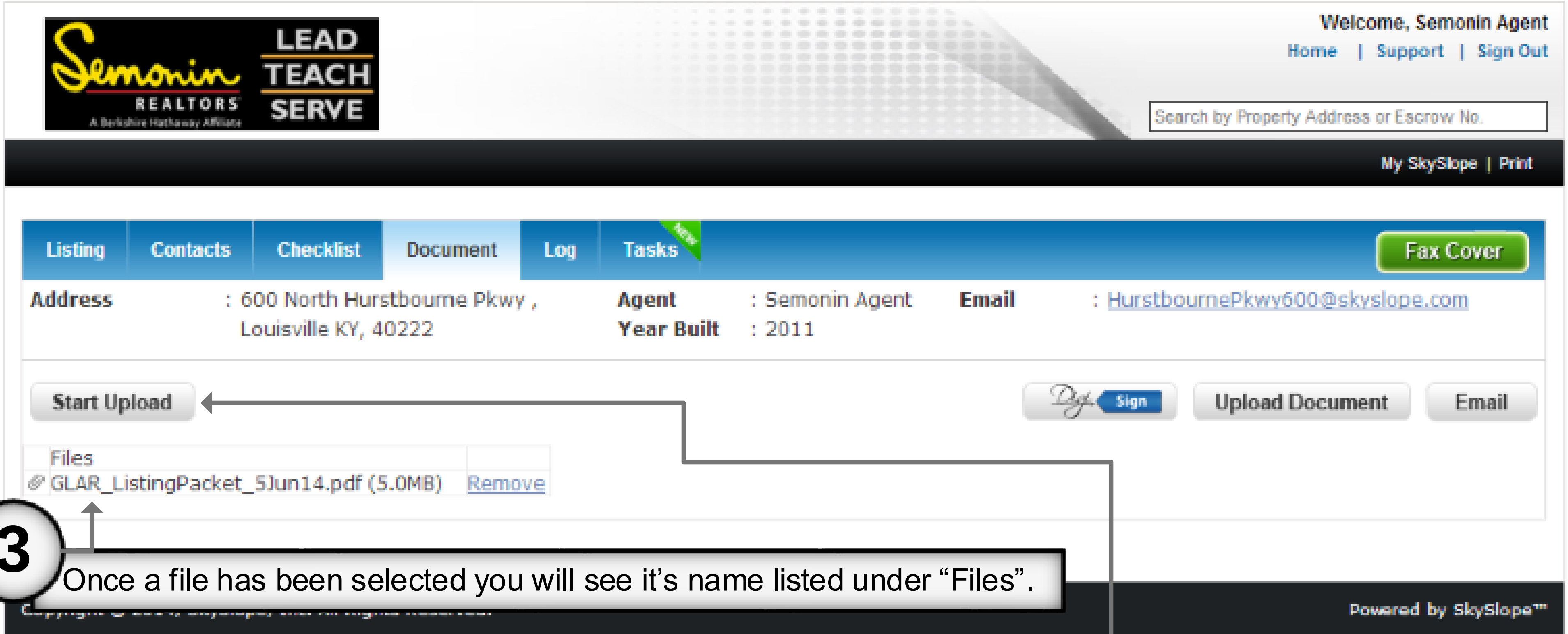
The Documents tab will give you a list of all documents that have been faxed, emailed or uploaded directly to the SkySlope Transaction. From here you can click Upload Document to begin the upload process.



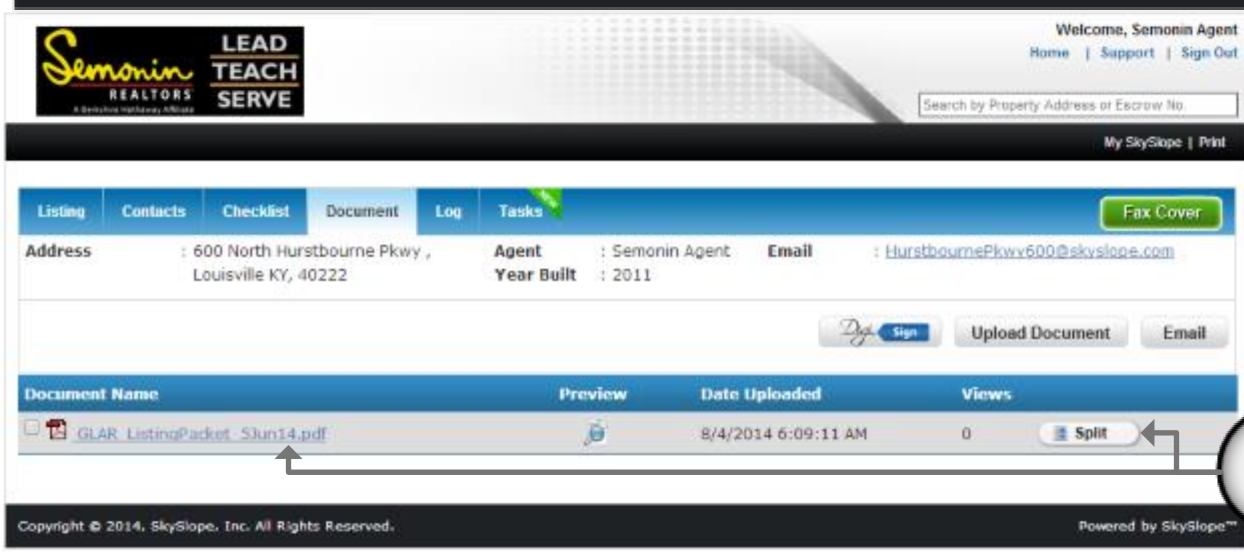
2

Clicking Upload Document brings up an "Open" window asking you to locate the document(s) you wish to upload. Once you have selected the document, click Open to begin.

You can select multiple files by holding CTRL and clicking each filename you need before clicking Open to start the upload process.



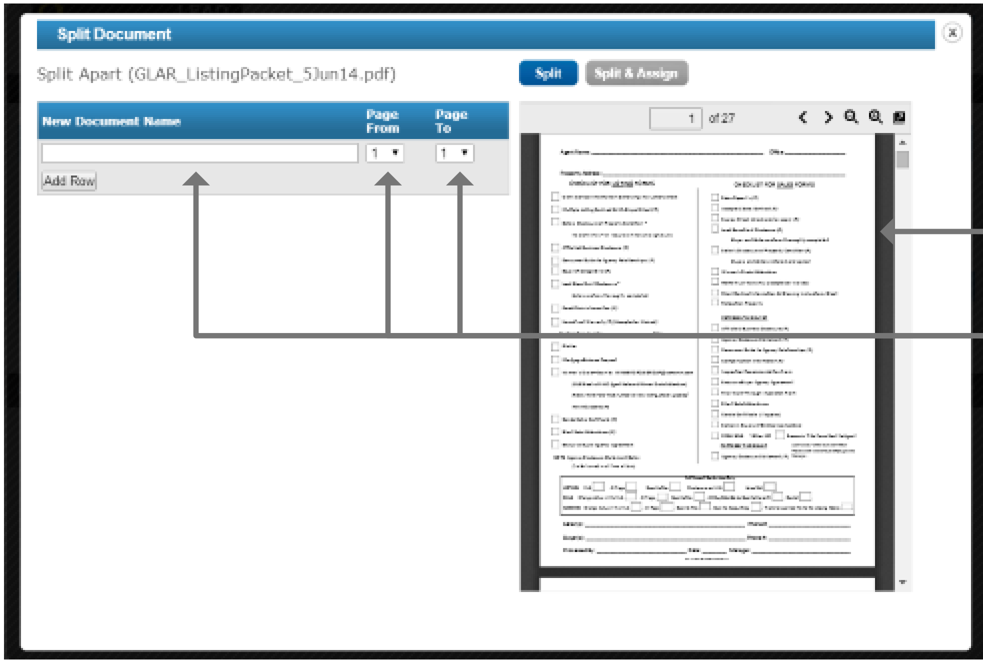
3 Once a file has been selected you will see it's name listed under "Files".



4 By Clicking Start Upload you initiate the upload process.

Once uploaded you can click the File's Name to view the document, or click Split to split one large PDF into it's many different pages/forms.

5

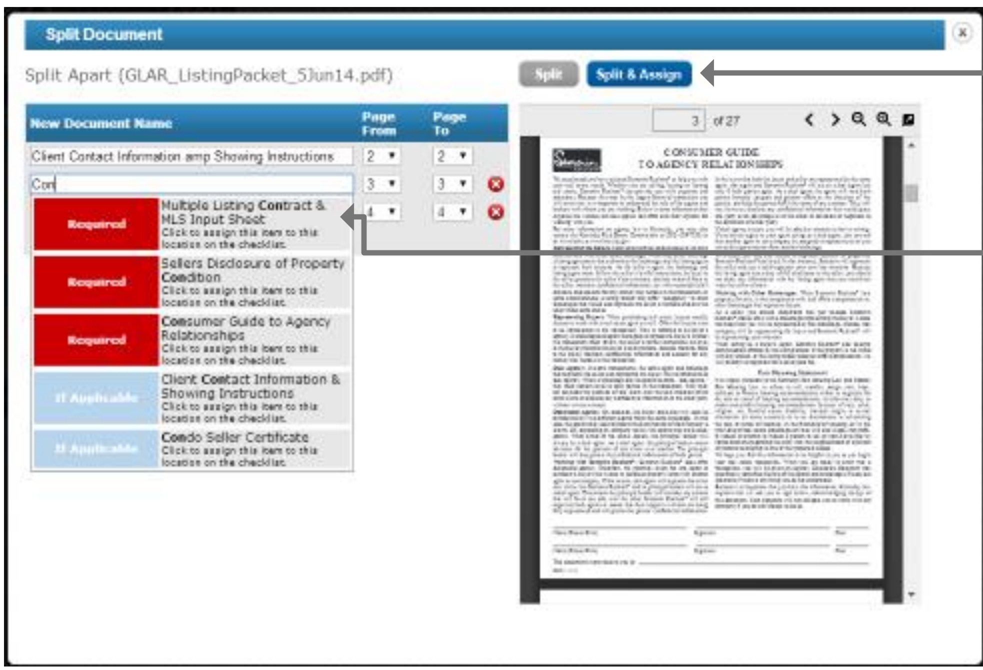


6

Once you click Split, a new window appears showing the document on the right, and a section on the left for naming each new document and selecting the page range each new document can be found. First, start typing the name of a form.

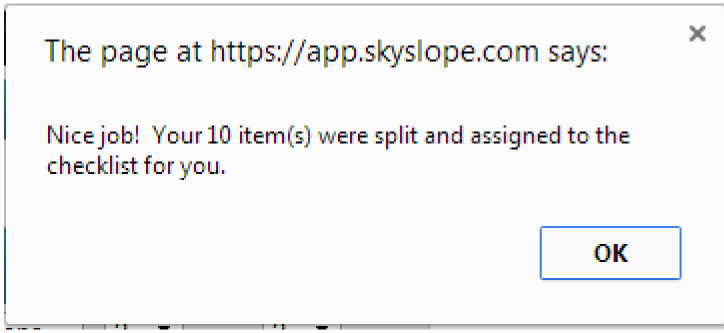
8

Continue adding rows and Document names until you have split the entire original document down into it's individual contract forms. Once finished, Click Split & Assign to Complete the splitting process.



7

As you type a Document name the Checklist Items start to appear. If the Document is part of the Checklist, click on its name to automatically assign it to that Checklist Item, if it is not, you can give it a custom name and it will not be auto-assigned.



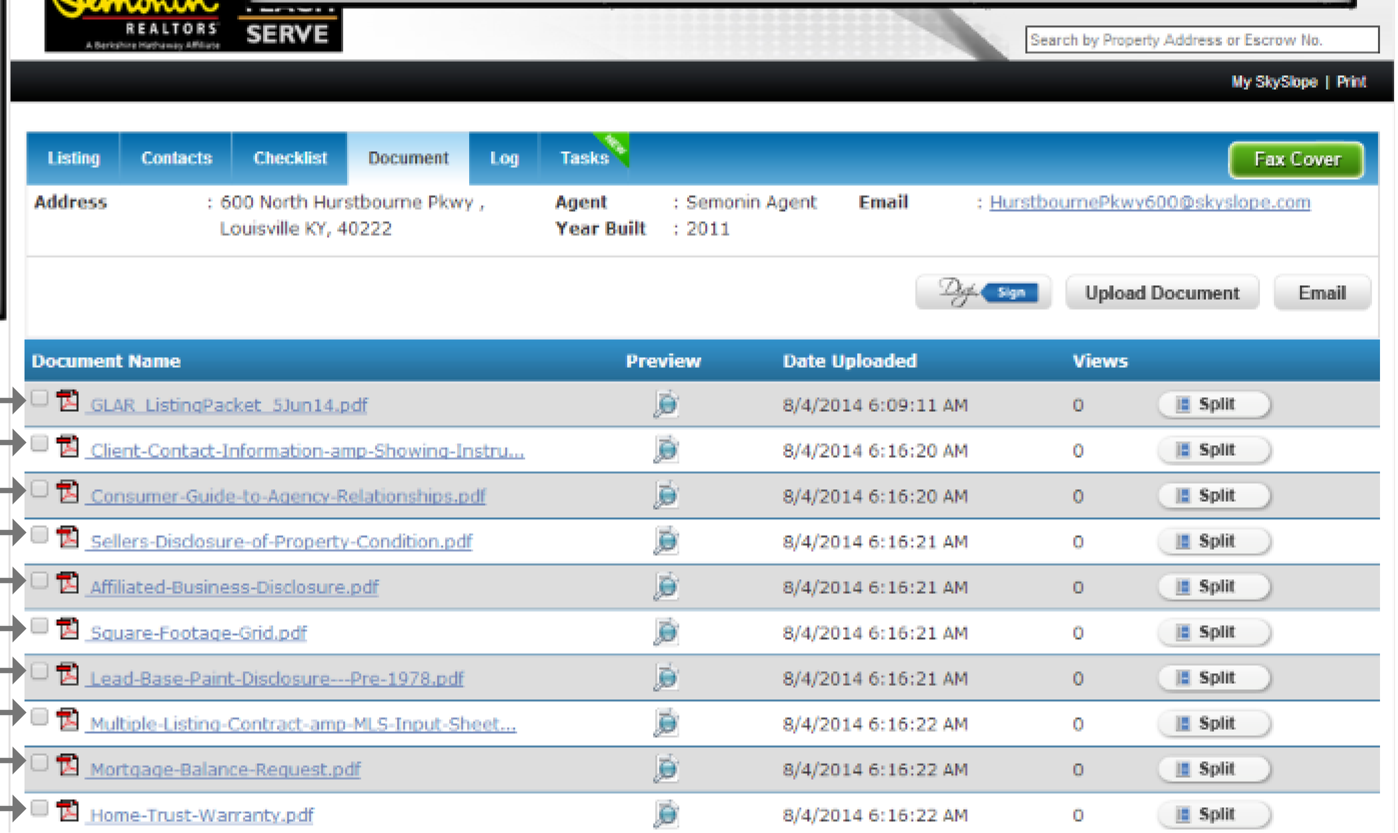
9 SkySlope will give you a message letting you know how many Documents you just created, and if/how many were assigned.

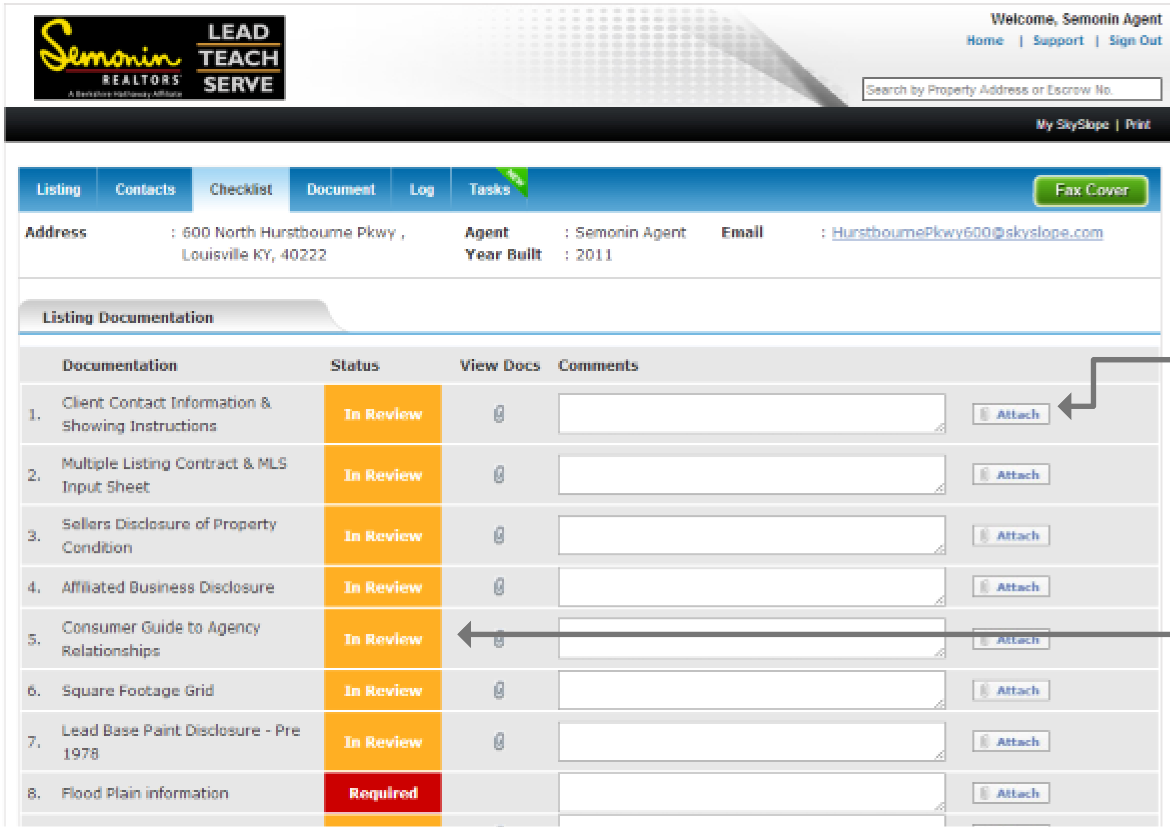
You will be brought back to the Documents page, and you should now see the Original Uploaded Document, each Individual Split Document and any other documents or files you may have uploaded. Files added to the Documents section won't be reviewed unless added to a Checklist item.

All Document Splits are non-destructive, meaning the original document is still on SkySlope, untouched, so if you had a page you didn't name and split, it is still accessible via the original document.

Original Document

Split Documents

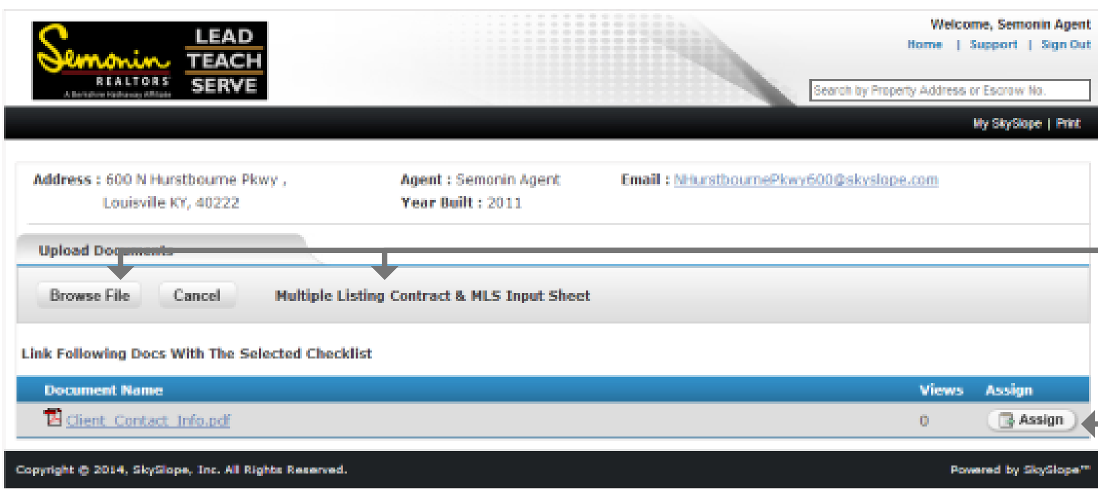




If you have individual forms saved to your computer as a PDF you may upload them directly to the Checklist item they correspond to. To do so, simply click attach from the Checklist page next to the item you wish to upload.

1

Any document you have uploaded to a Checklist Item will now show "In Review", which means it is waiting for your manager to check it for completion.

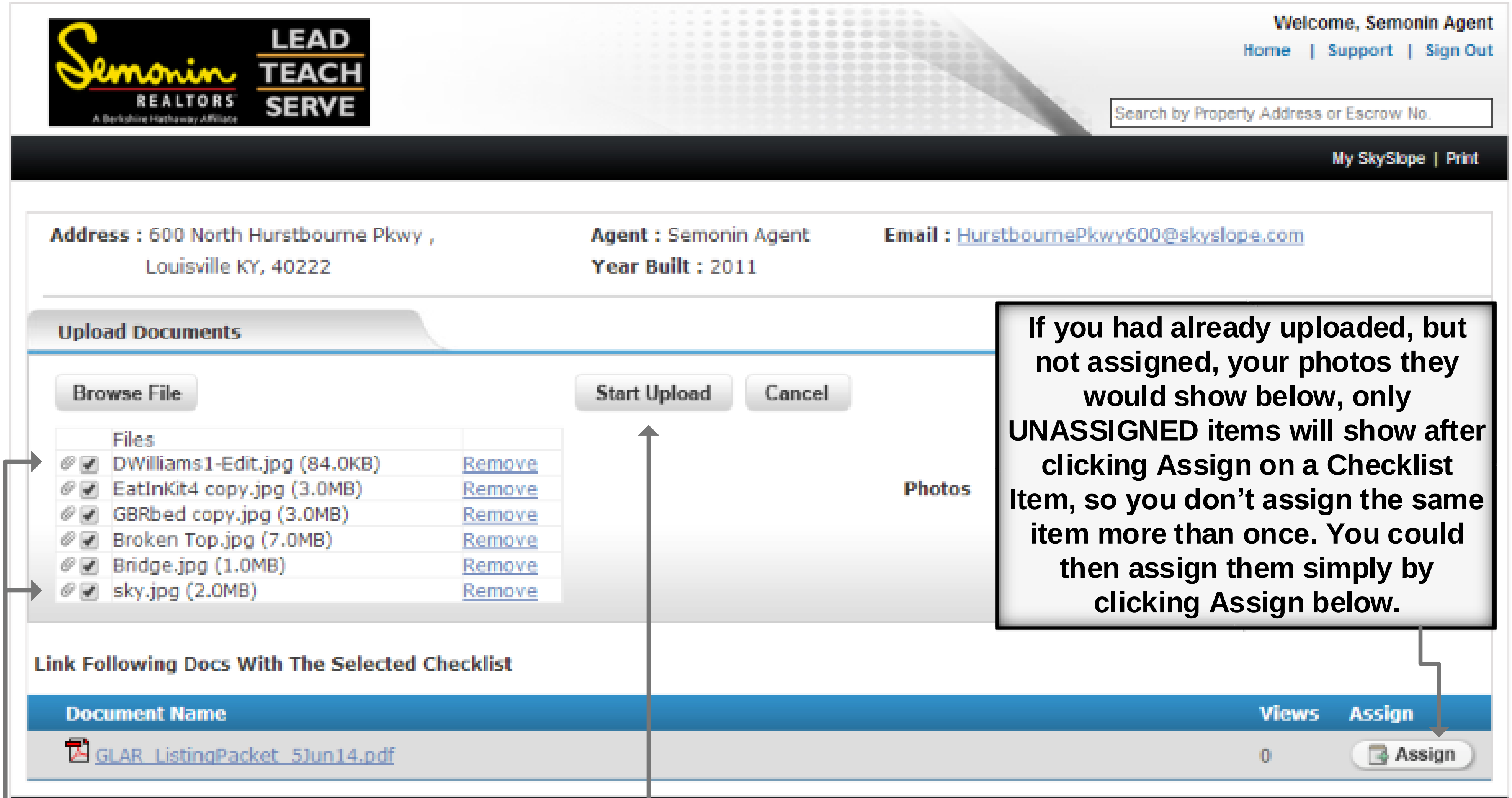


Once you click Attach SkySlope opens an Upload Document window. Click Browse File to browse your computer to locate the file you are working with.

2

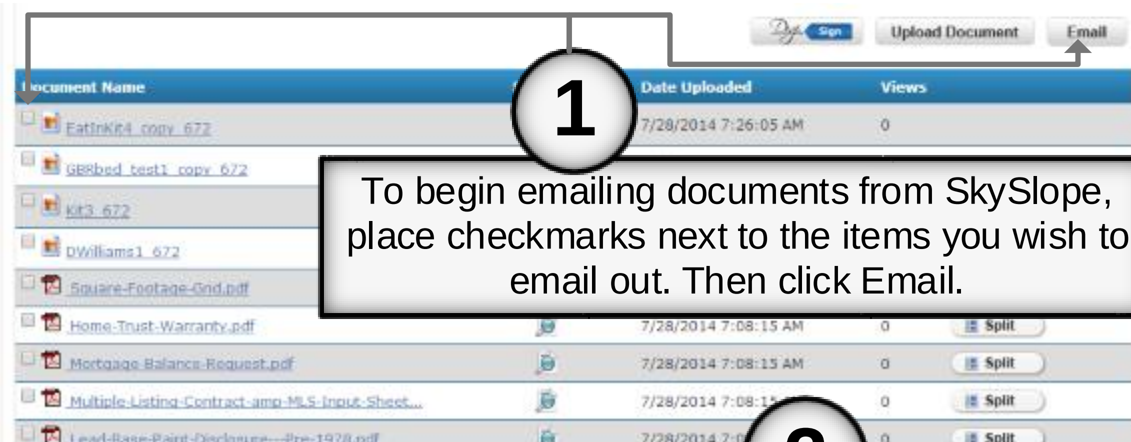
If you have any previously uploaded but unassigned, documents they will show at the bottom, and can be assigned via a single click.

3



If you had already uploaded, but not assigned, your photos they would show below, only UNASSIGNED items will show after clicking Assign on a Checklist Item, so you don't assign the same item more than once. You could then assign them simply by clicking Assign below.

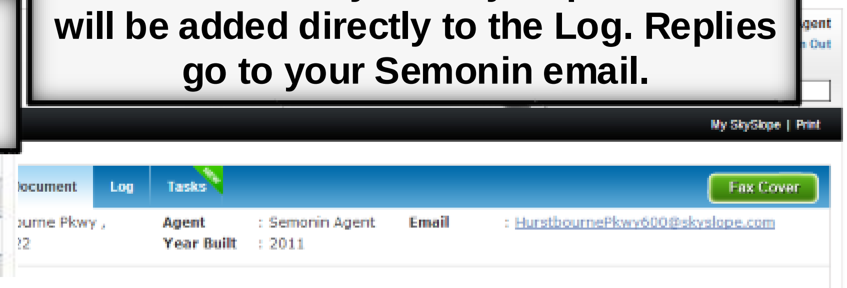
Clicking Assign next to the Photos Checklist item allows you to upload photos and the photos list to that Checklist Item. When you browse you can use the Ctrl key to click multiple images on your computer, or the Shift key to select an entire folder or series of images for uploading. All photos would be assigned to the Photos Checklist Item if you use this method. Be sure to Browse and Add all photos before clicking Start Upload. Uploading photos to the Checklist Item only saves them for future access, it does not add them to the listing in FlexMLS.



1

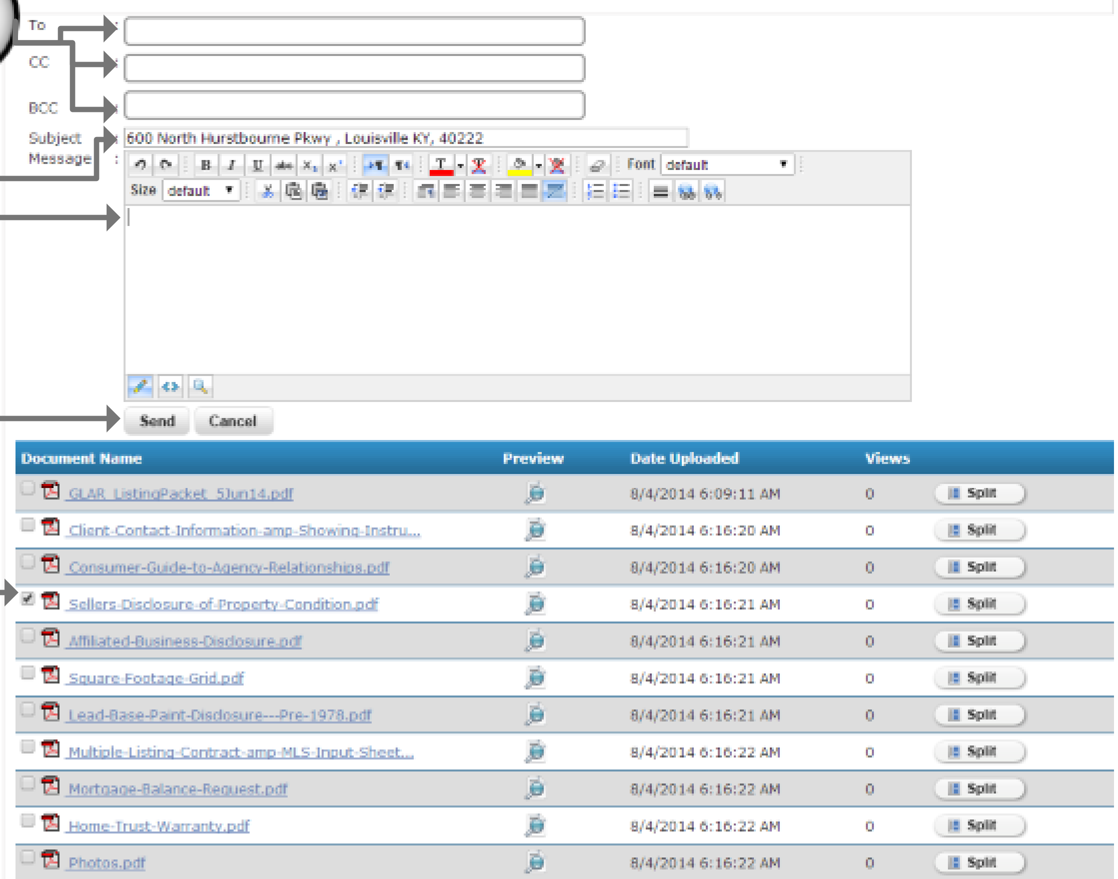
To begin emailing documents from SkySlope, place checkmarks next to the items you wish to email out. Then click Email.

Any document in SkySlope can be emailed directly from SkySlope. Emails that come from your SkySlope account will be added directly to the Log. Replies go to your Semonin email.



2

Once you click Email, you will be given the To, CC (Carbon Copy) and BCC (Blind Carbon Copy) fields, enter the recipients and be sure their emails addresses are correct.

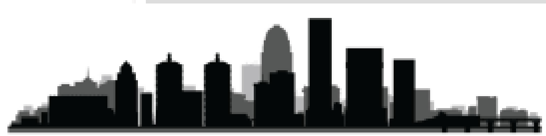


3

Next give the email a Subject and Body.

4

Finally, confirm that all documents you wish to email are selected and click Send.

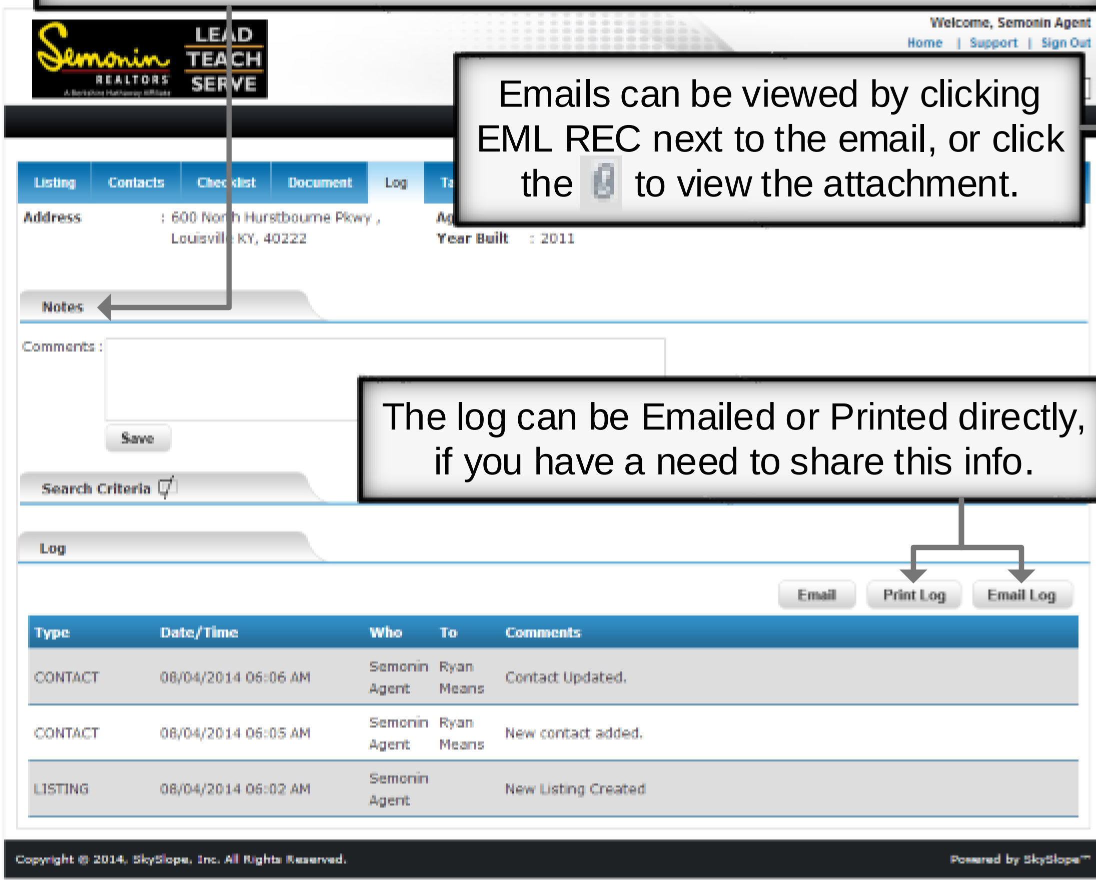


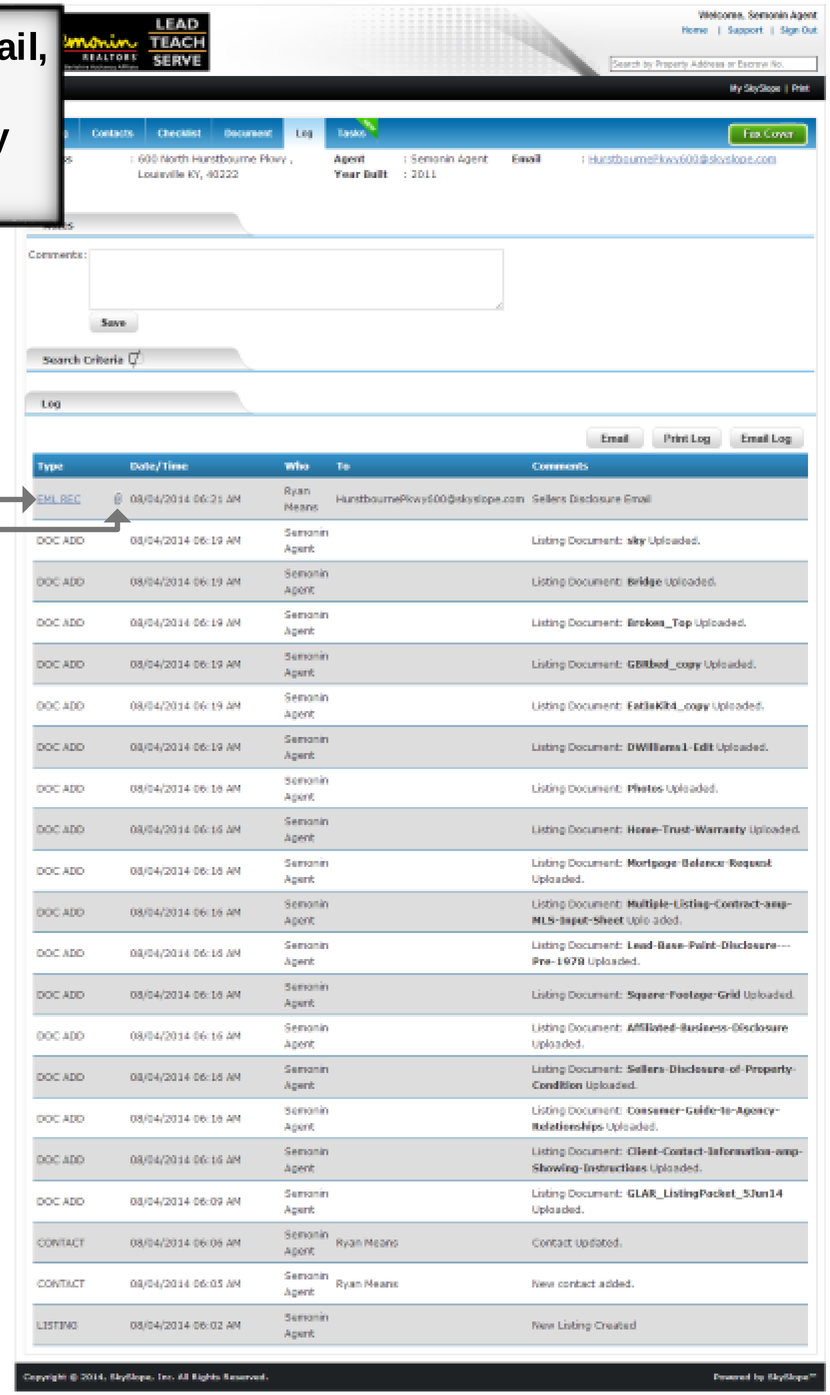
The Log tab of SkySlope keeps track of every change, note, email, document and any other info associated with a Transaction. Below you see the log the first time you could see it, basically empty. To the right is after emails and document uploads.

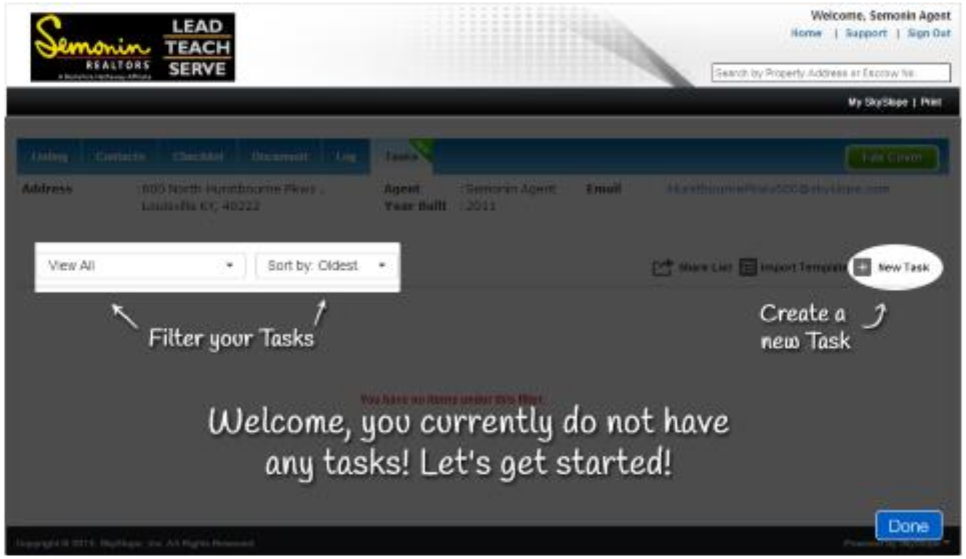
By Clicking on Notes you can create and save a custom note for this transaction, this can be done at anytime during the transaction and is a great way to keep additional info.

Emails can be viewed by clicking EML REC next to the email, or click the attachment icon to view the attachment.

The log can be Emailed or Printed directly, if you have a need to share this info.







SkySlope also has a tasks/reminders section built in for each Transaction. These are tasks you setup, and can be customized to the way you work. You can also create Task Templates to allow you to quickly add tasks you use frequently to certain transaction types. We will discuss Tasks further in a later section.

Once a Template has been created you can import that template to this transaction. Task lists can also be shared if you have an assistant or someone else you need to share it with.

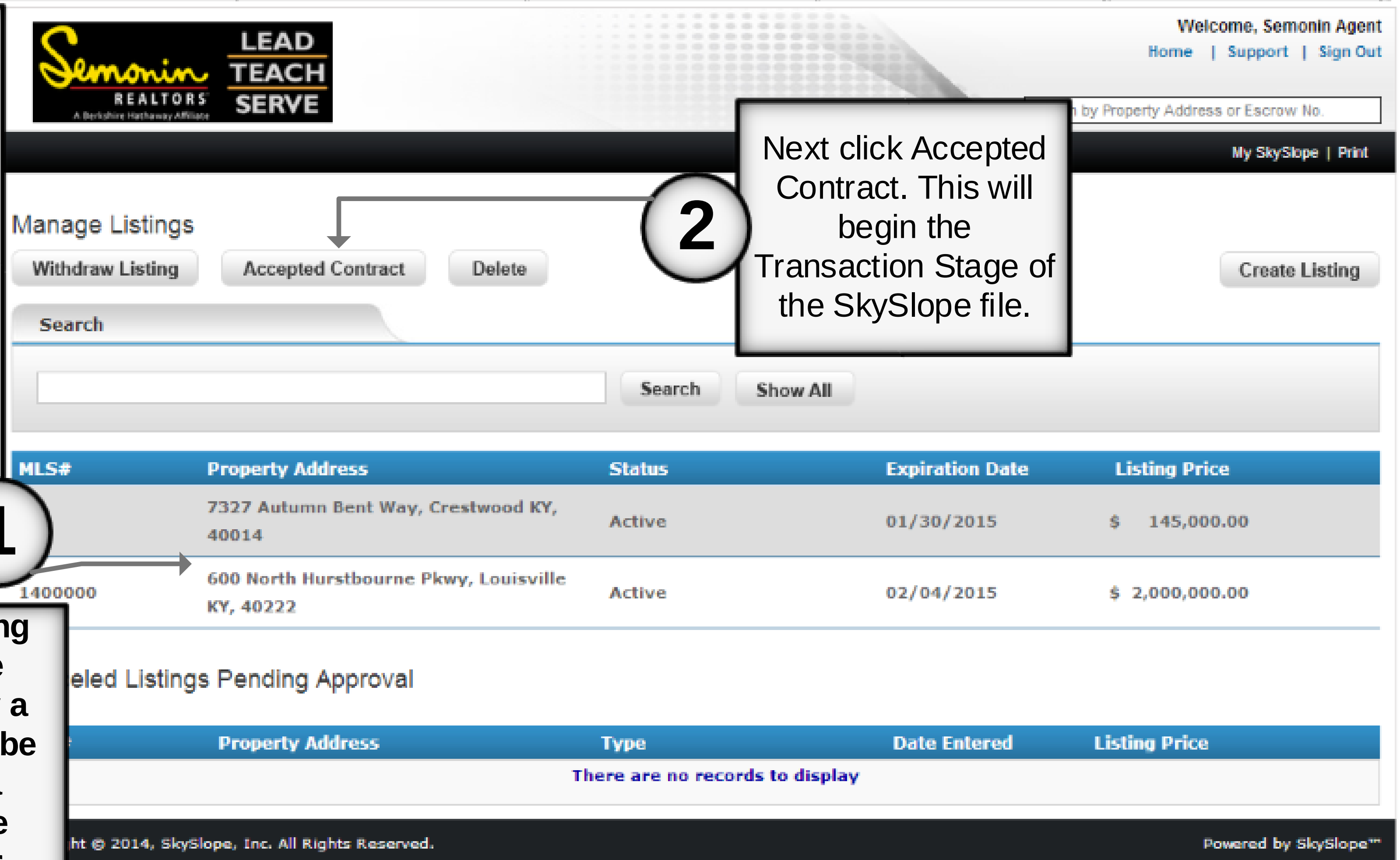
You can setup a Task List Calendar Sync, which allows you to see what you need to do each day for each transaction in your cell phone or email calendars. We will discuss this in detail in a later section.

Manage Listing vs Create Transaction

If you are working with a Buyer only, you can use Create Transaction to begin working the file for that Transaction. If you have a Listing that gets an accepted contact you need to **START** in Manage Listing. While all pending contracts are considered Transactions, any of your Listings are able to be converted to a Transaction, which keeps all the Listing Contract and Checklist items, while adding the new information for your Pending Contract.

To convert a Listing to a Transaction, you first need your Required Checklist items to ALL be Accepted by your manager, then go into Manage Listings, Single Click on a Listing Address, double clicking opens the listing to work on it as a listing.

1



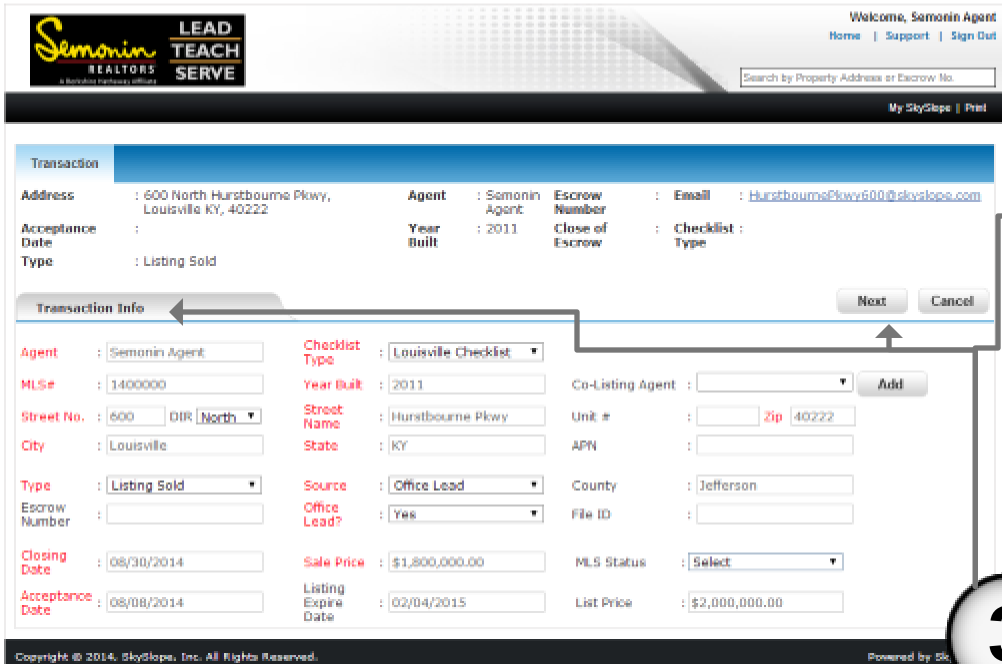
2

Next click Accepted Contract. This will begin the Transaction Stage of the SkySlope file.

From Manage Listing you also have the option to Withdraw a listing, but you will be required to give a reason that will be approved by your manager.

Listings converted to Transactions will have additional information that is required, but you should have filled most of that info out during the Listing phase of SkySlope.

When you Create a Transaction you will be asked for information specific to the Buyer and the listing they are purchasing, very similar to setting up a listing.



3

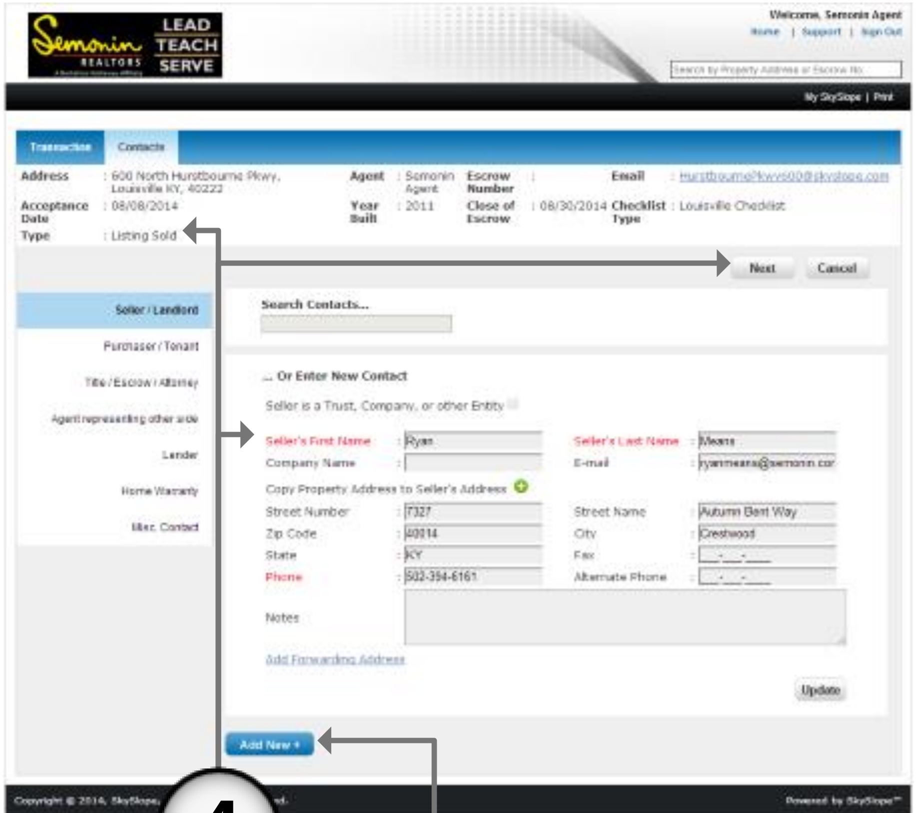
Whether creating a new Transaction or Converting a Listing to a Transaction you will enter the Transaction's information, then click Next to move to the next Step, Seller Information.

In SkySlope there are three types of Transactions:

Sale – Used when only working with Buyers

Listing Sold – Used when accepting a Contract on your Listing

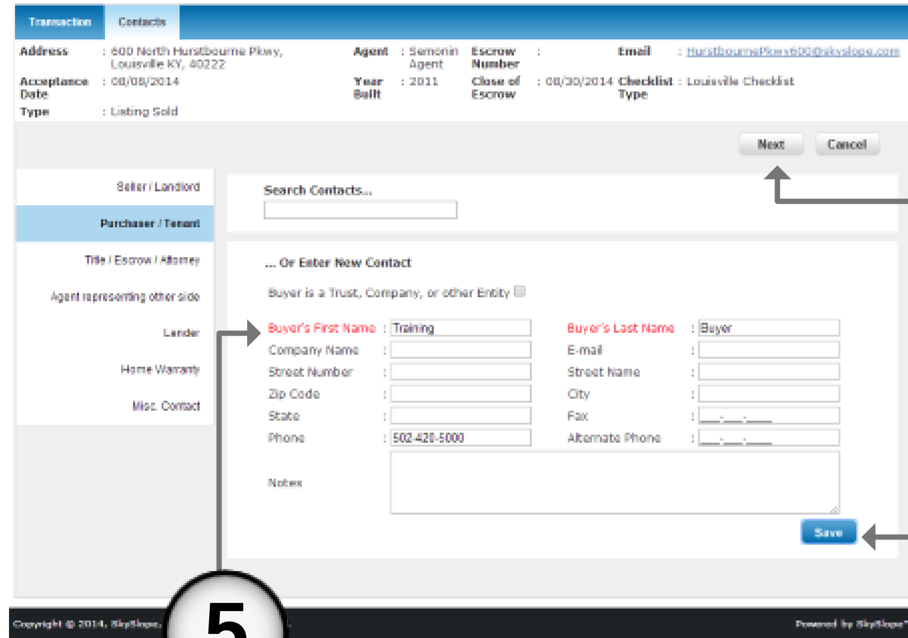
Both Listing and Sale – Used when you are working as the Buyer's and Seller's Agent.



4

Once you add the Transaction Information you will be asked for the Seller information. As the buyer's agent you may not have this info, so you may enter NA or Unknown into the seller field. IF you are converting a listing, this should already be here for you. Just confirm the information you had previously typed, then click Next.

On both Buyers and Sellers you can add a second contact by clicking Add New once you have saved the first contact.

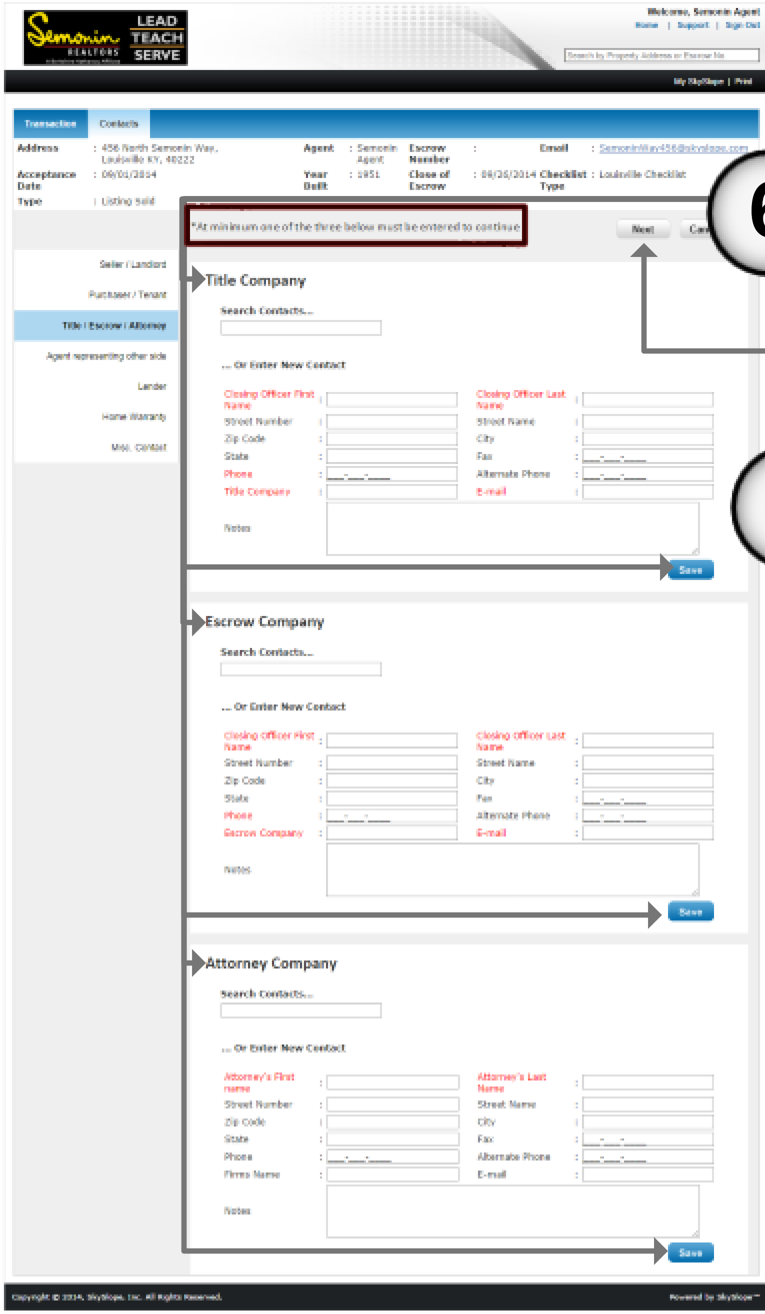


5

After entering your Seller Information SkySlope asks for Buyer Information. Fill out as much info as you have, especially email address and phone numbers.

After Entering in a contacts details be sure to click Save before clicking next, otherwise you are not saving the contact or their data.

Click Next to move on.



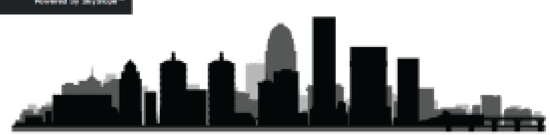
6

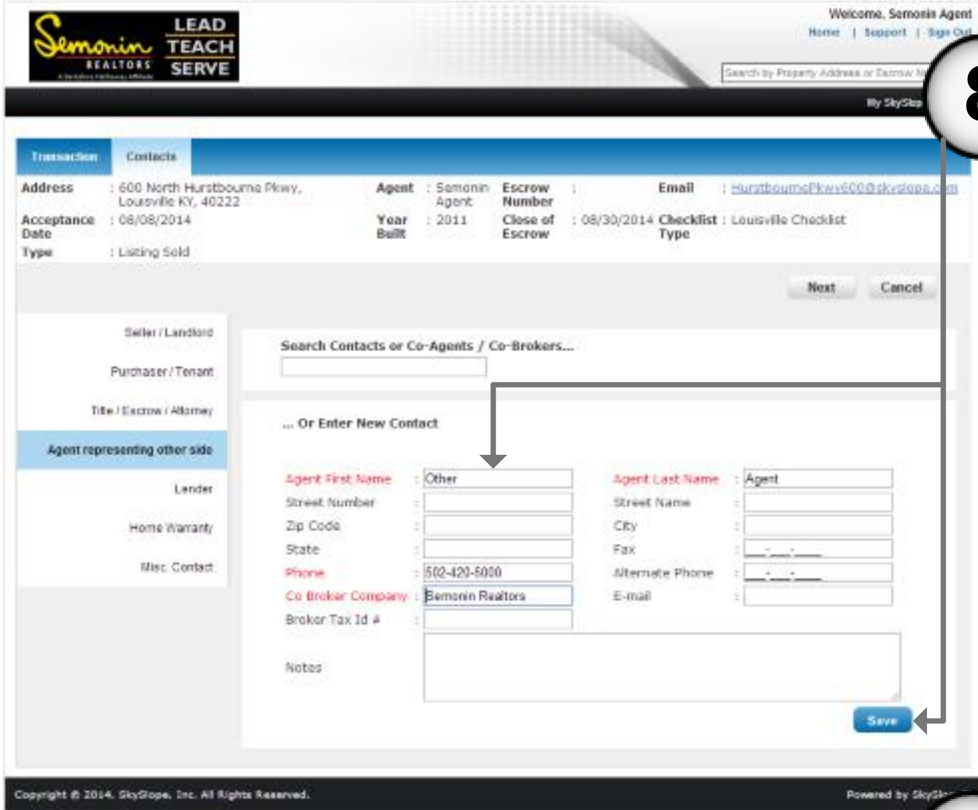
The next step in Converting a Listing or Creating a Transaction is adding a Title Company, Escrow Company, or Attorney. SkySlope does require you to enter at least one of these three Contact types. If, for any reason, you do not have this information at the time you are entering the information, please enter N/A or Unknown in the First and Last Name fields of Attorney, then click Save. If you do have any of this, please enter it, then click Save.

7

Once all the information for this page is complete, click Next to move to the Other Agent step.

You only need one contact for either Title, Escrow or Attorney. If you don't know any of the three, enter NA for Attorney first and last name.



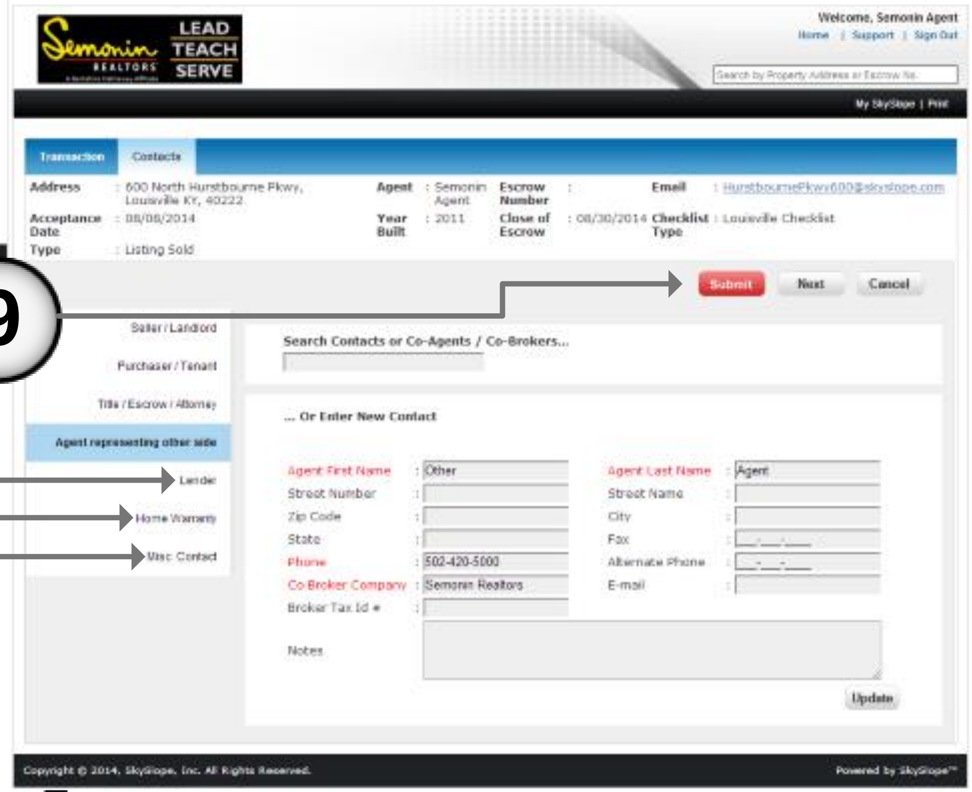


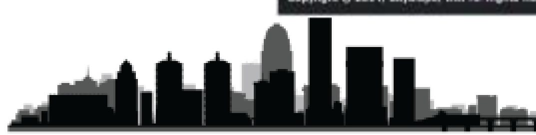
8

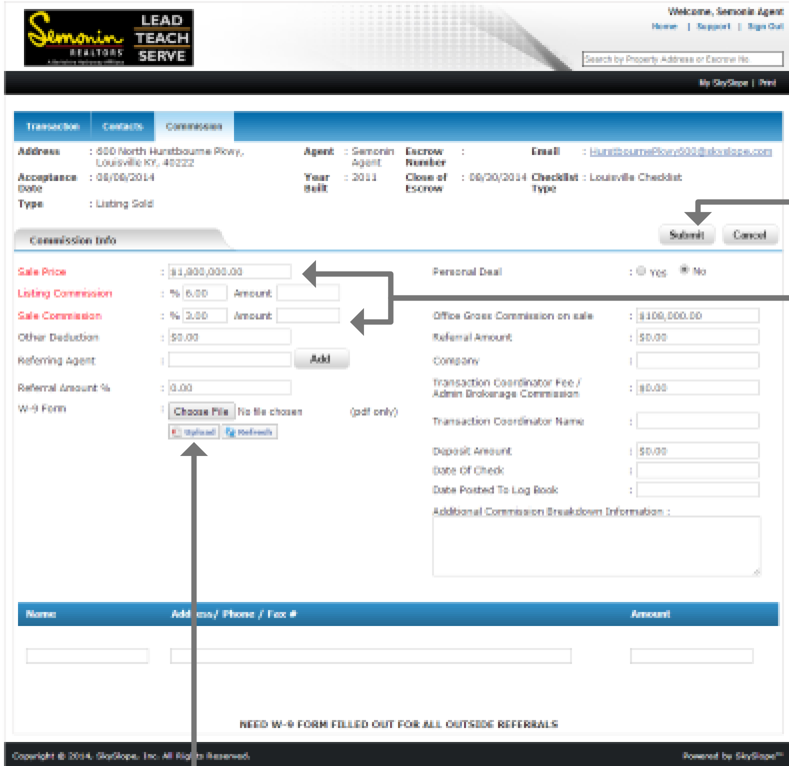
In the Other Agent section, enter the Selling Agent for your Listing, or the Listing Agent if you are the Buyer's Agent. Once you have entered the info, click Save.

9

Once you save the Other Agent's info, you will see a red Submit button appear. Once you see this button you know that all required information has been entered. You can click Submit to move to the Commission portion of this Transaction, or you can click next to enter contact information for Lender, Home Warranty, and any Misc. Contacts the transaction may need.



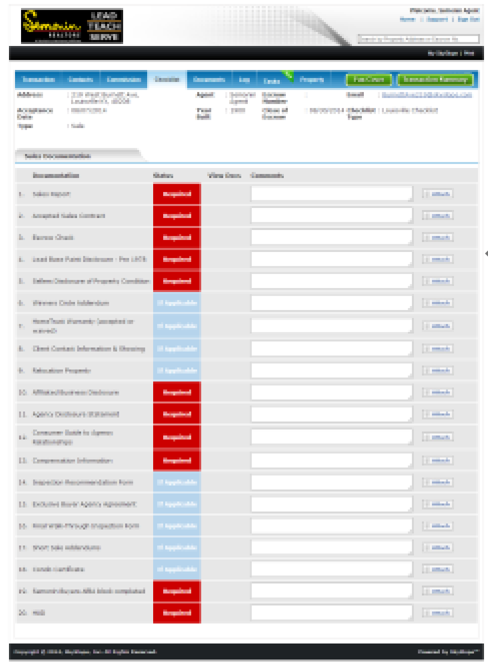




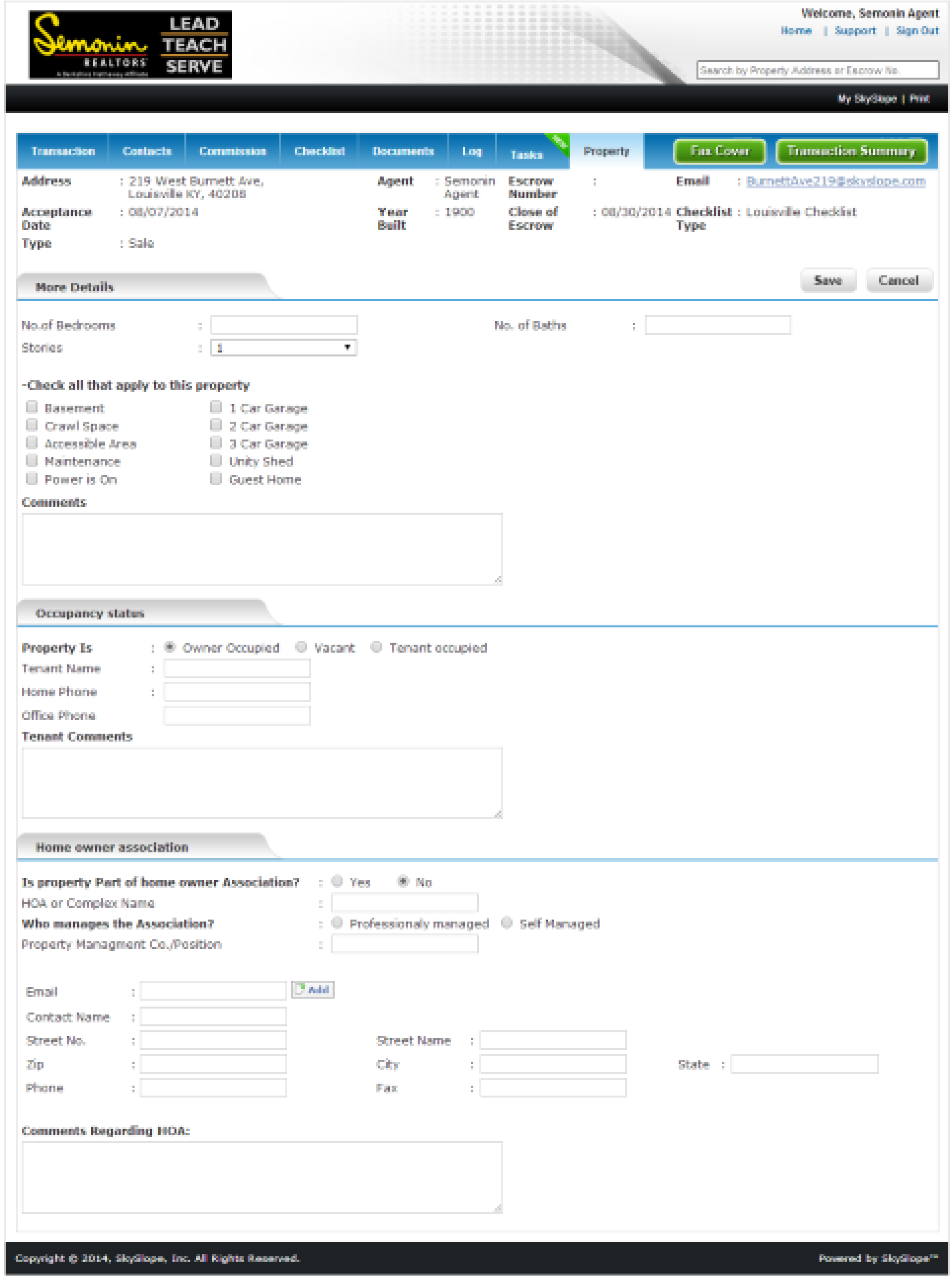
10

Once you have Submitted the Contact info for a Transaction SkySlope will ask for Commission information. Again, if this was a listing that you converted, some of this info may be entered already. Enter any applicable information and click Submit to finish the creation of this Transacton.

If this is an Outside Referral, please upload the W9 on this page, if you have it at this point, it can be uploaded at a later date too.



Once you reach the Checklist page you will see the Required and Optional forms for Transactions. If this was a Converted Listing you will also see the completed Listing Checklist at the bottom of the page.



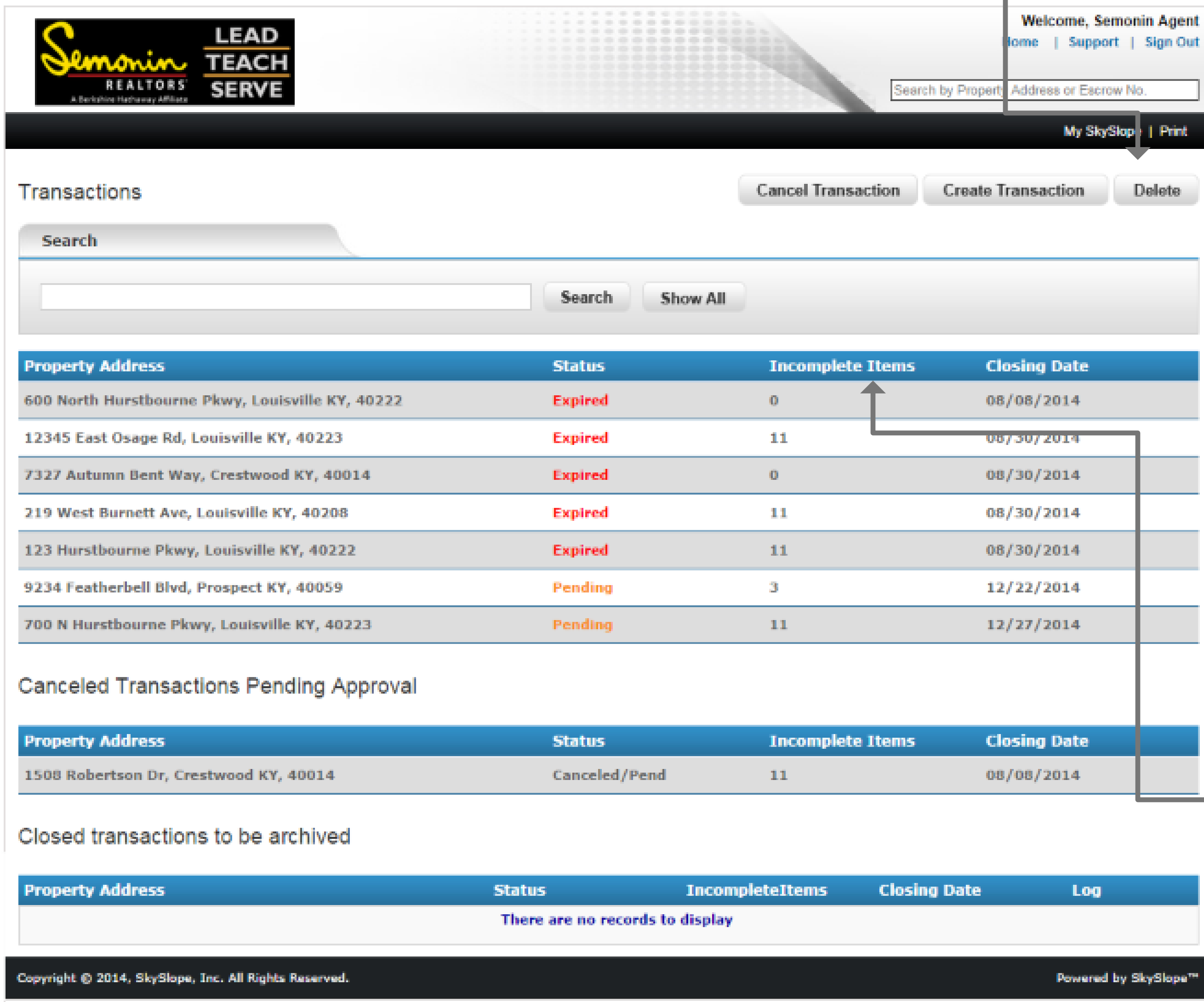
Once created there are very few differences in SkySlope from a Listing to a Transaction. Both can be modified, have additional documents added, both get an email address for forwarding your emails and texts to, and both have a similar checklist page, log and tasks.

There are, however, two new buttons that appear on the Transaction that were not on the listing's page.

The first is the **Property** Tab. Here you can add additional information about the property you are selling. This is not a required page, but it is there if you'd want to save additional property info in SkySlope, just to ensure you have those details if you ever need them.

The second button is **Transaction** Summary, this button will create a PDF that summarizes the general information for the sale, as well as commission break-downs.

The only Transaction that can be Deleted is an incomplete Transaction, one you began but didn't finish filling out.



By clicking the Pending Transactions button on SkySlope's homepage you will see a list of your Pending and Expired Transactions (Expired based on Closing date in SkySlope, not officially expired), as well as Canceled Transactions and Closed Transactions.

If you click on a Transaction it will be highlighted with a Blue color.

If you double click a Transaction it will load the transaction and allow you to continue working it.

By Single clicking a Transaction you can then click Cancel Transaction, which informs your Manager that the sale has fallen through, and asks you to enter details as to why. Even canceled transactions are stored for 5 years.

By clicking the Tasks & Reminders button on the SkySlope homepage you are taken to the Task Center. Here you will see all tasks and reminders you have created for each listing and transaction, as well as any general (personal list) tasks you may have assigned yourself.

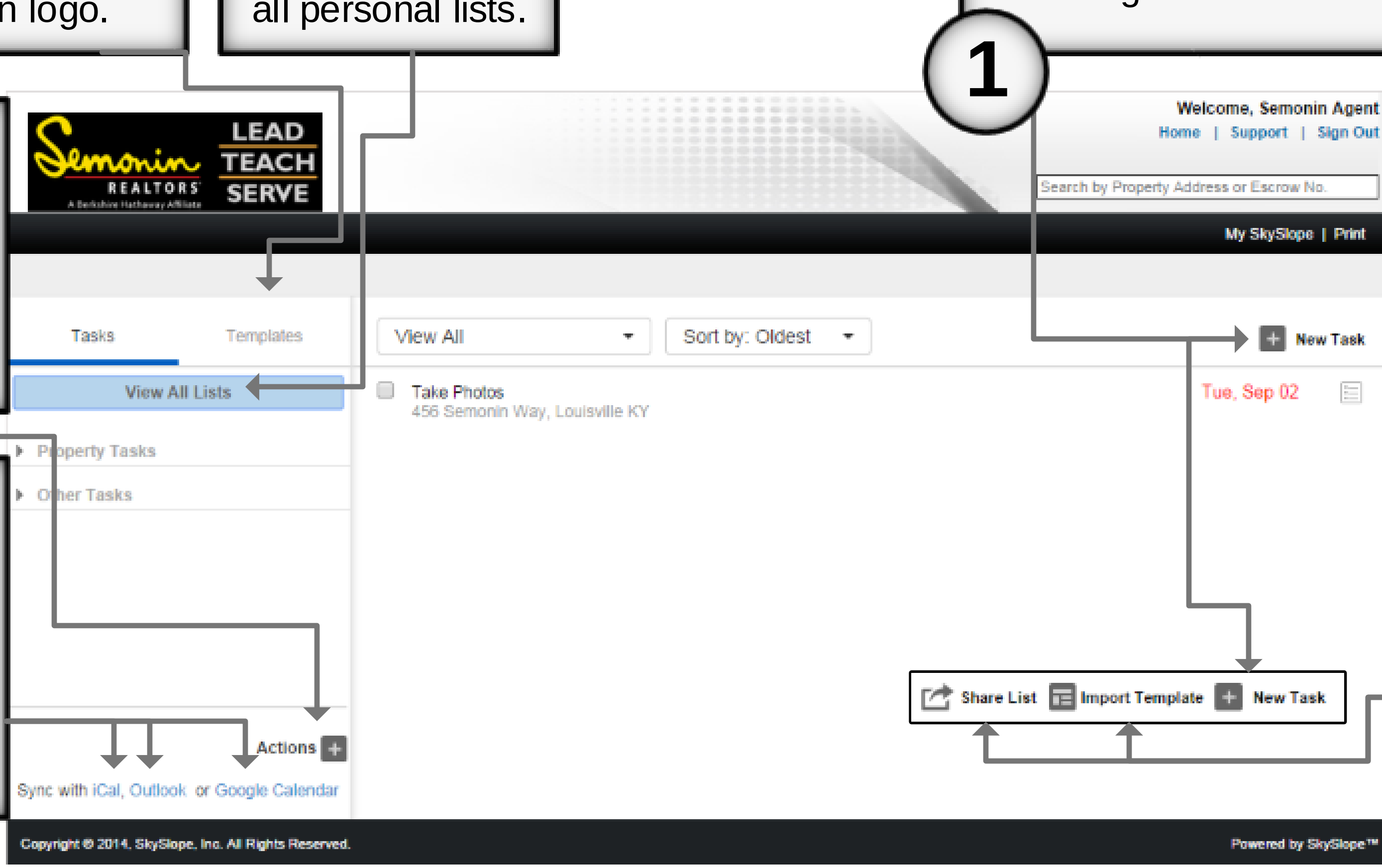
In the task center you can create, view and modify Task Templates by clicking Templates below the Semonin logo.

By clicking View All Lists you will see tasks due for all properties and all personal lists.

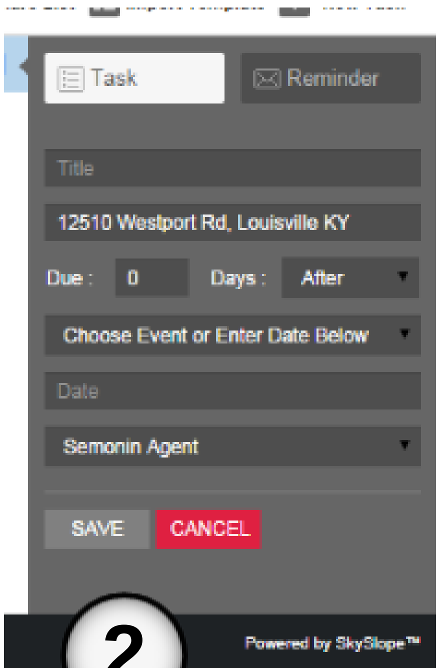
You can also add a new general or property specific task by clicking New Task at the right of the screen.

Clicking Actions allows you to create a Personal List of non-property related tasks.

You can sync your Tasks and Reminders with iCal, Outlook and your Google Calendar!

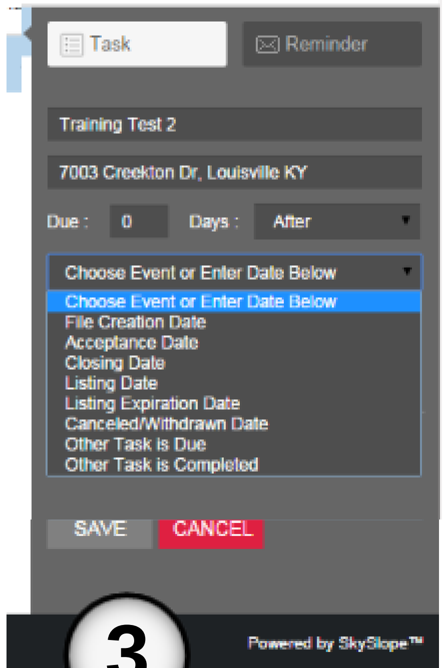


By selecting a List of Tasks (property or personal) you get some additional buttons, like Import Template or Share List.



2

When Creating a Task you need to pick a Date or Event Type before trying to select X days after/before/on. You could name the task at this point as well.



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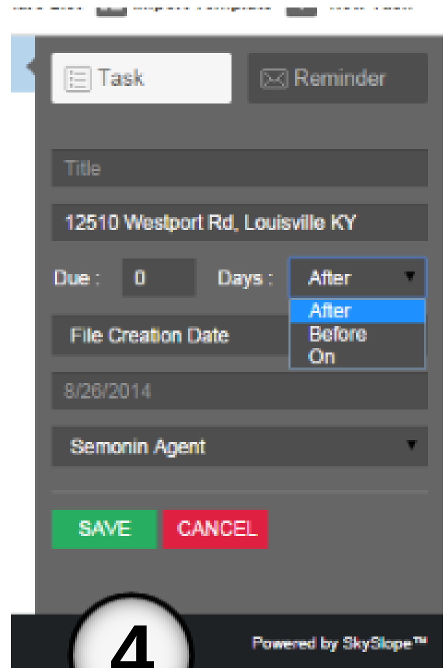
There are currently 8 “event types”, any of which can have a task assigned X days before or after, or on that date.



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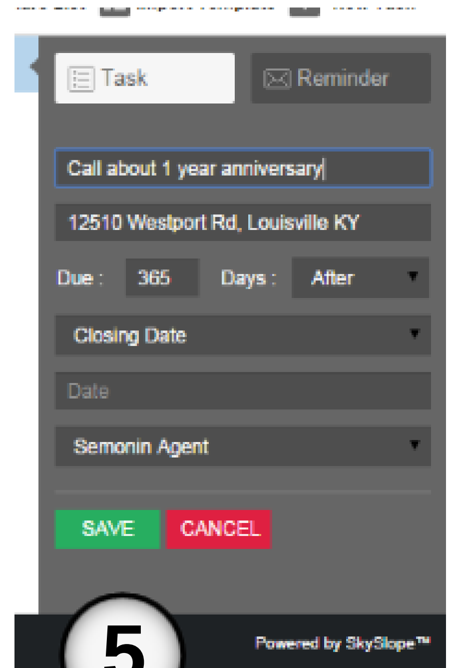
Once you choose the Event Type, pick before, after, or on. For before or after, select how many days before or after the task will be assigned.



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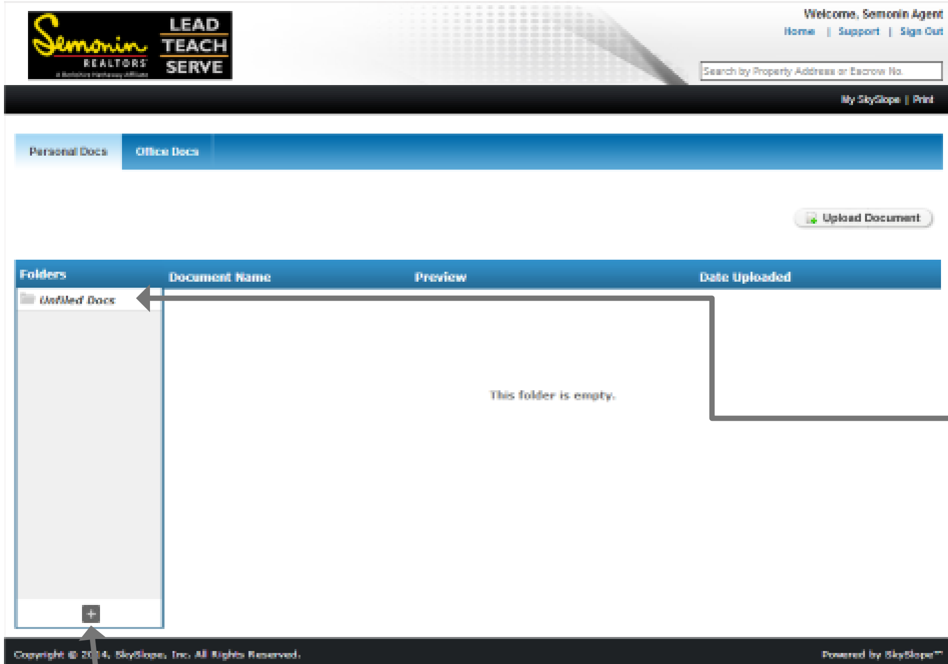
If you haven’t yet, name the task, then click Save to finish. Once saved you will see the task in your task center, and can modify it at anytime by clicking the task name.

Working Documents



The Working Documents section of SkySlope is a basic storage area for varying file types. Working Documents could be compared to using your desk for paper documents, it is the catch-all. Once loaded into Working Documents you can create a folder to store files, or you can assign them to a Listing or Transaction directly.

Working Documents will usually be used to store Buyer documents prior to getting an accepted contract, but can also be used to store any documents not associated with a current Listing or Transaction. Organization will be important here, you can see that initially all files go into the Unfiled Docs folder.

Click to Create a new folder. Once that folder is created, click it to select it, then click again to create a folder in that folder.

There are many potential uses for the Working Documents section of SkySlope, and you will all develop your own methods of organization and use, but there are a few recommendations I will make.

For organization purposes, create a Buyers folder, then add any buyers you are working on as their own folder under buyers.

Other useful folders could be Upcoming Listings (prepare documents prior to appointment) and Past Buyers (for those who didn't purchase through you).

For more information please contact:

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ryanmeans@semonin.com

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Pending Transactions: Access Pending Contracts you have already started on SkySlope.

Create Transactions: Begin working a Pending Contract. ONLY when you are not the Listing Agent.

Manage Listings: Work with Listings you have already started in SkySlope.

Create Listing: Begin working a new Listing, this will be where you turn in new listings.

Incomplete Checklist: See which Listings and Transactions have Checklist Items that still need to be added or Assigned.

Digital Signature: DigiSign is a digital signature software that allows you to send any document via email to be signed, initialed and dated.

Canceled Contracts: Any Withdrawn or Canceled Listing or Transaction in SkySlope.

Access Archive: Access your Closed Listings and Transactions in SkySlope.

Tasks & Reminders: Access your Tasks Dashboard, as well as create new Task Templates.

Working Documents: A section that allows you to upload Documents that aren't associated with a Listing or Transaction.