



REAL ESTATE **DASHBOARD**

Real Estate Dashboard User Guide



GoPaperless
SOLUTIONS, INC.



Real Estate Dashboard User Guide, First Edition

by GoPaperless, Inc.

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Errata for this manual are available at REDSupport@GoPaperless.com



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Real Estate Dashboard Overview

Thank you for purchasing Real Estate Dashboard by GoPaperless, Inc. Real Estate Dashboard is a powerful productivity suite written specifically to help eliminate the burden of paperwork from real estate transactions.

The purpose of this guide is to familiarize new users with all of the features and benefits of Real Estate Dashboard.

What is the Real Estate Dashboard?

Real Estate Dashboard is a hybrid application that leverages the power of a Windows application with the convenience and availability of a web-based application. The key features of Real Estate Dashboard are:

- Permission-based Online Document Management
- Document Synchronization and Backup
- Communication through FAX or E-Mail
- Contact Management
- Convenient Note Management

Real Estate Dashboard has a user interface similar to that of Microsoft's Office productivity suite. Users that are familiar with programs such as Word, Excel, or Outlook will be able to easily work with Real Estate Dashboard, and immediately benefit from all of its capabilities.

We at GoPaperless, Inc. thank you for your purchase. Real Estate Dashboard was developed by real estate professionals for real estate professionals. We hope you find that tools provided by this application will have a significant positive impact to your bottom line.

Here's to your ongoing success in real estate!

Getting Started with Real Estate Dashboard

Installing Real Estate Dashboard

Upon purchasing your copy of Real Estate Dashboard, you will receive an e-mail containing a download link for the application. Click on this link to begin the installation process. During this process, you will receive two warning messages. Click the "run" button on both of these warning messages in order to install Real Estate Dashboard.

NOTE: If you already have a version of Real Estate Dashboard installed on your computer, you will need to uninstall that version before reinstalling. This can be done through the "Add/Remove Programs" tool located in the Windows Control Panel.

During the installation process, you will be asked some basic installation questions. It is suggested that beginner users accept the default answers for these questions. Expert users can use these installation steps to control where the application is installed, and what users on the computer will have access to run it.



Registering Real Estate Dashboard

When running Real Estate Dashboard for the first time, you will be prompted for some basic user information and a registration key. Your registration key is located in the same e-mail that contained the download link for Real Estate Dashboard. Enter that registration key into the proper field, and then fill out the remaining user registration fields on the screen. Once you click the "Authorize" button, your Real Estate Dashboard software will be registered.

If you do not have a registration key, you can sign up for a 5-day trial. Enter your user information, leaving the registration key field blank, then click the "Authorize" button. If, after registering for the trial, you wish to purchase Real Estate Dashboard, complete the online order form.

Your Online Vault Address & FAX Number

Real Estate Dashboard users will also receive a web address (URL) to their Vault. This URL can be used to access documents in your Vault without using the Real Estate Dashboard software. You will also be able to use this URL to share your documents with other people. You can learn more about this feature in the "Vault" section of this manual, located on page 6.

With the exception of trial users, all Real Estate Dashboard users are assigned a unique FAX number. Faxes sent to this number are viewable through your Real Estate Dashboard software. Also, Faxes sent from Real Estate Dashboard will contain this number as the "sent from" phone number. You can learn more about this feature in the "FAX" section of this manual, located on page 15.

Subscription Fees and Upgrades

- The Real Estate Real Estate Dashboard monthly subscription fee covers the following:
- 300MB of storage space in the Vault
- Up to 300 FAX pages per month
- Your FAX number, including any local toll or long distance FAX transmissions

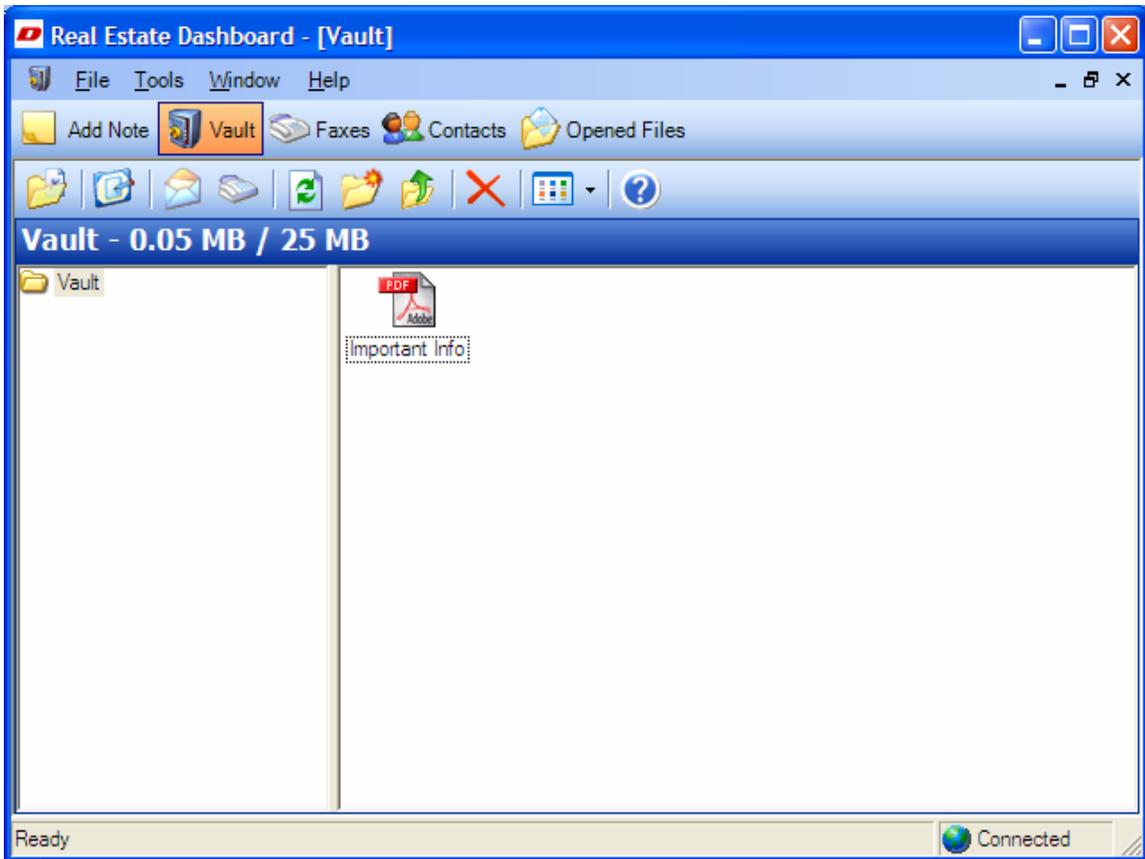
FAX pages beyond the 300 included with your subscription are billed at \$.08 per page.

If you desire to increase your Vault storage space, you may do so in blocks of 100MB at any time. Contact GoPaperless customer support at 866.913.0628 or visit www.GoPaperless.com for current pricing information.

Product Updates

New features and updates for the Real Estate Dashboard will be released periodically. When a new update is available, you will receive a pop-up message notifying you of the update. Simply click the "Accept" button to automatically download and install the update.

The Vault



How it Works

The Vault is an online document repository. The Vault is a powerful tool which provides the following features:

- **Document Storage and Backup**
Documents that are added to the Vault are stored on a secure remote server. When working with documents in your Vault, changes you make are automatically synchronized with the remote server. The Vault also acts as a remote backup service: should your computer ever crash, all of the documents in the Vault will remain safe.
- **Document Sharing**
Using the advanced features of Real Estate Dashboard, it is possible to share documents in your Vault with other individuals. You have complete control over who can view which documents. At any time you are able to assign and revoke permissions to view documents stored in the Vault to anyone, even if they do not use Real Estate Dashboard.

Working with Folders

You can organize the documents in your Vault using folders, similar to how Windows uses folders to organize the files on your computer. There is no limit to the number of folders that can be created inside of your Vault. You can even create subfolders within existing folders, just like Windows.

To create a new folder, simply click on the "New Folder" icon  on the Real Estate Dashboard toolbar.

You can work with the files within your folders much the same as you would work with files on your computer. You can drag and drop files from one folder into another. You can also drag files from your computer into the Real Estate Dashboard and vice versa.

Importing Documents

In order to store a document in your Vault, you must import it. Real Estate Dashboard supports Microsoft Word® (.DOC) and Adobe Acrobat® (.PDF) files.

To import a file into Real Estate Dashboard:

1. Click on the "Vault" button  on the Real Estate Dashboard navigation bar.
2. Click the "Import File" button  on the Vault toolbar.
3. In the dialog box that appears, navigate to and select the file you wish to import. Only .DOC and .PDF files will be visible in this window.
4. Once you click the "Ok" button, the file you selected will now be visible within your Vault as a PDF file (Word? documents are automatically converted to PDF).

Once the document is imported, you can then drag it into the appropriate folder.

Importing Multiple Files

To import multiple files, simply hold the "shift" key on your keyboard as you select the files you wish to import in step 3 above. If you are using a Tablet PC, open your input panel and switch to keyboard mode, then tap the "shift" button once, followed by each of the files you wish to import.

Working with WinForms & ZipForms

You can easily work with your WinForms or ZipForms documents within the Real Estate Dashboard. Simply use the "export to PDF" function of either WinForms or ZipForms to save the desired form to PDF, and then import the document into Real Estate Dashboard as you would any other document.

Working with Documents

You can open a document stored within the Vault by double-clicking the document in the file list. The file, when opened, will be displayed within the digital ink editor. If you own a Tablet PC, this interface will allow you or your client to digitally fill out forms and contracts, saving considerable amounts of paper.

You can open multiple documents within the Real Estate Dashboard. Simply click on the document tabs located just under the Real Estate Dashboard toolbar to switch between your open documents. If you wish to save documents that have been written on, click on the "Save to

Vault" button  and select a location and file name to save the edited file as. You also have the opportunity to send files via e-mail and fax from the digital ink editor. These features are discussed in greater detail in later sections of this document.

For more information on the Digital Ink features of Real Estate Dashboard, please refer to the Digital Ink section of this document, starting on page 19.

Saving Documents

The Vault

To save a document in your vault, click the "Save to Vault" button  on the toolbar. A pop-up dialog box will appear which will allow you to specify the name of the saved file, and also specify an alternative folder to save the file in.

You can save over the existing file by simply selecting that file in the file list. Alternatively, you can enter a new file name in the "File Name" to save a copy of the file.

Your PC

To save a document to your desktop (i.e. export the file from Real Estate Dashboard), click the

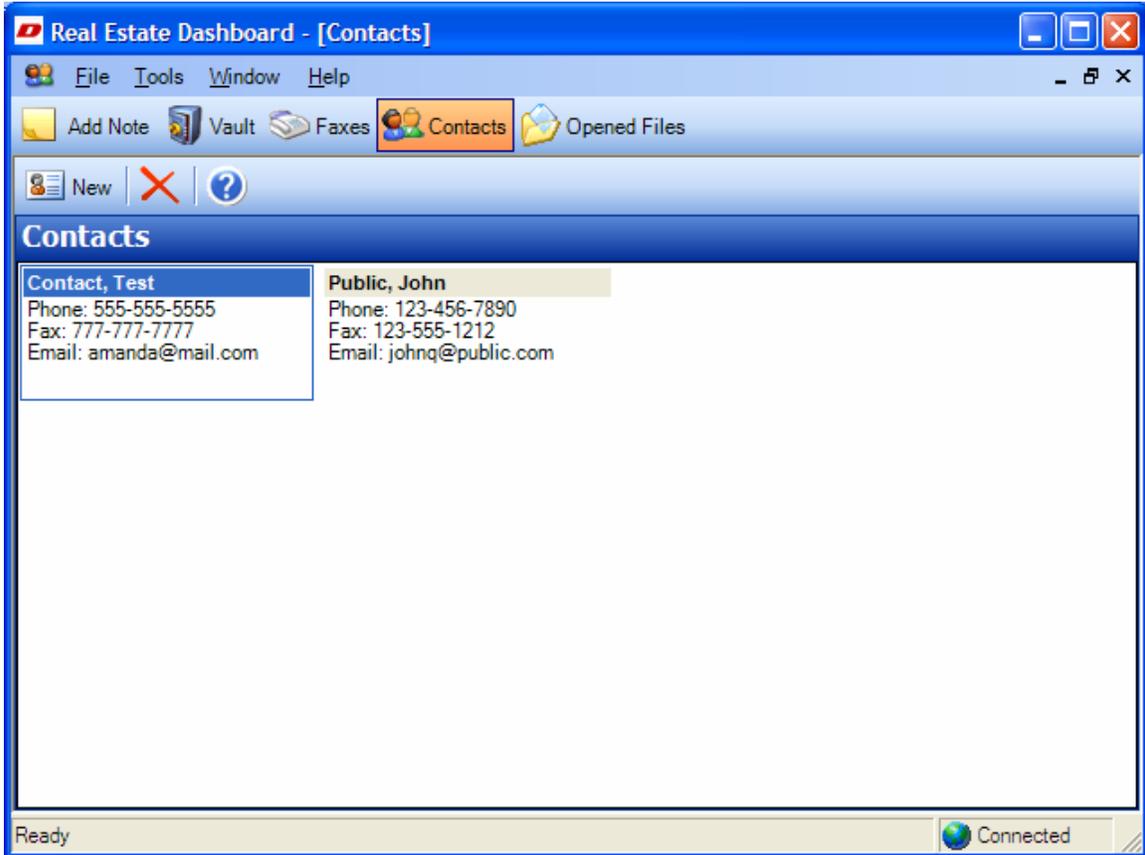
"Desktop" button . Similar to saving files within the Vault, a pop-up dialog box will appear which will allow you to specify the name of the file and the location on your desktop to save the file.

Vault Storage Capacity

Your monthly Real Estate Dashboard subscription includes 300MB of Vault storage space. Additional storage space can be purchased in 100MB blocks. If you are interested in purchasing additional storage space, contact REDSupport at 866-913-0628 for pricing options.

Contacts

Overview



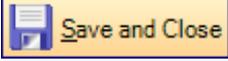
The Real Estate Dashboard contains a powerful contact management utility, allowing you to store all your important contact details in one central location. Use this feature to keep track of all of your clients, service providers, and others whom you wish to keep in contact with, or whom you wish to share documents in your Vault with.

Managing Contacts

Creating a Contact

Click the "Contacts" button  in the navigation bar, then select the "New Contact" button  in the toolbar. Fill in the fields listed in the pop-up dialog box, then click the "Save and Close" button  to save the contact.

Editing a Contact

To edit a contact, simply double-click the contact in the "Contacts" window. Make any necessary changes, then click the "Save and Close" button  to save the changes.

Removing a Contact

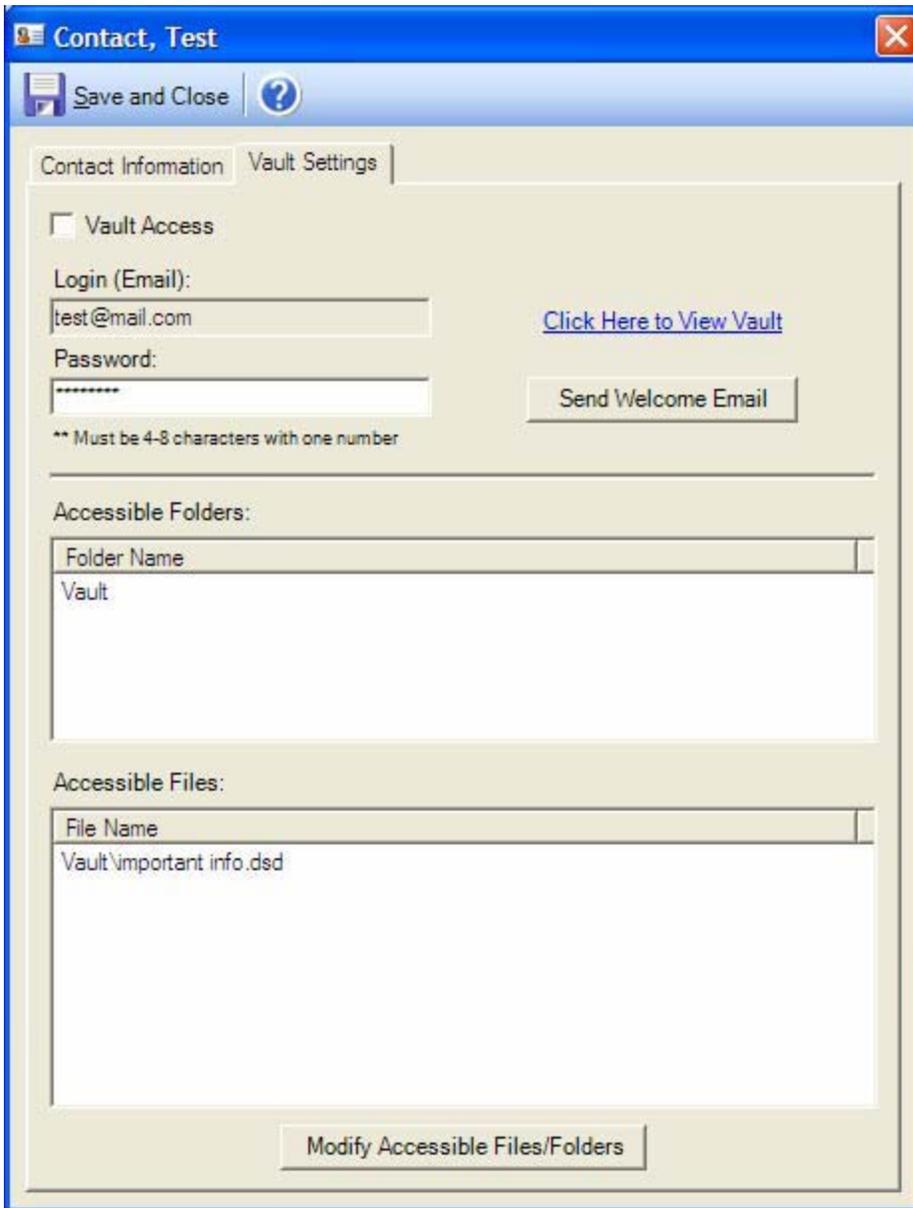
To remove a record from your contact list, simply select the contact in the main "Contacts" window, then click the "Remove Contact" button .

Vault Permissions

Overview

One of the most powerful features of Real Estate Dashboard is the ability to give your clients and business associates access to documents in the Vault. Anyone you currently have set up as a contact in your Real Estate Dashboard can be granted permissions to individual files or entire folders within your Vault, and can access these files across the Internet using the Vault URL you were assigned when your account was established.

Setting up Contacts for File Sharing

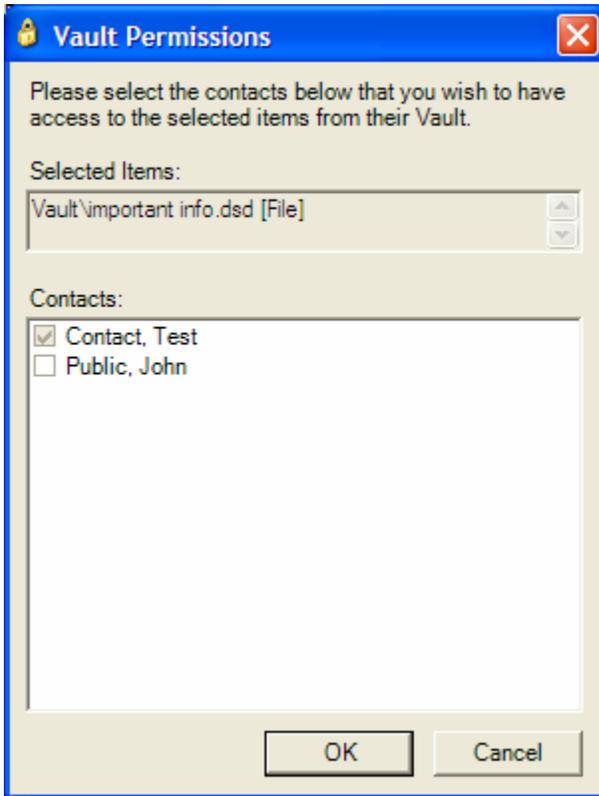


Before you can grant access to files in your Vault to a contact, you must grant that user access to your vault. To grant a contact access to your Vault:

- Open up a contact, then select the "Vault Settings" tab.
- Click on the "Vault Access" checkbox.
- Specify a password for the contact.

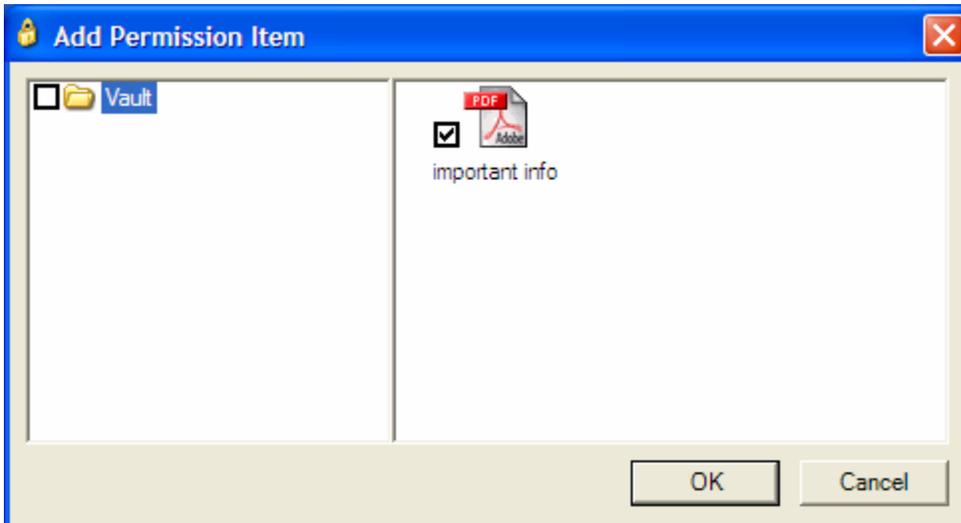
Once these steps are completed, the contact will be able to access your Vault with any web browser using the Vault URL.

Granting Permissions



Right click on any folder or file in your Vault, then select the "Set Vault Permissions" menu item. You will be presented with a list of all the contacts currently available in your Real Estate Dashboard. Simply click the check box next to the contacts you wish to grant permission to, then click "Ok".

Editing and Revoking Permissions



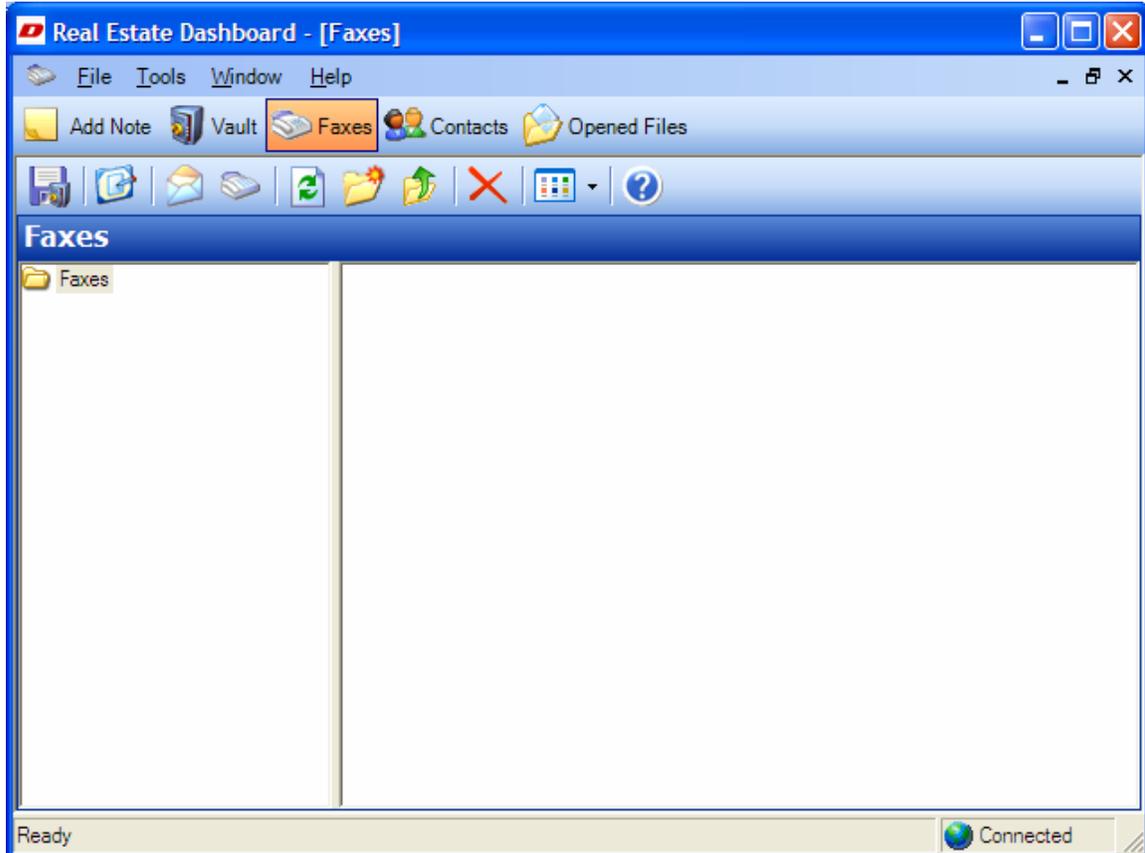
You can also grant, edit, and revoke permissions in the contact editor. Double-click a contact to edit it, then select the "Vault Settings" tab. You will see a summary of the contact's current permissions. By clicking on the "Modify Accessible Files/Folders" button, you will be presented with a dialog allowing you to add and remove permissions to all files in the Vault. Make changes by checking and unchecking the checkboxes next to the files and folders in your Vault, then click "Ok" to save the settings.

What your Contacts See in your Vault

When you grant permissions on files or folders, contacts logging into your Vault will only see the files or folders you assigned to them.

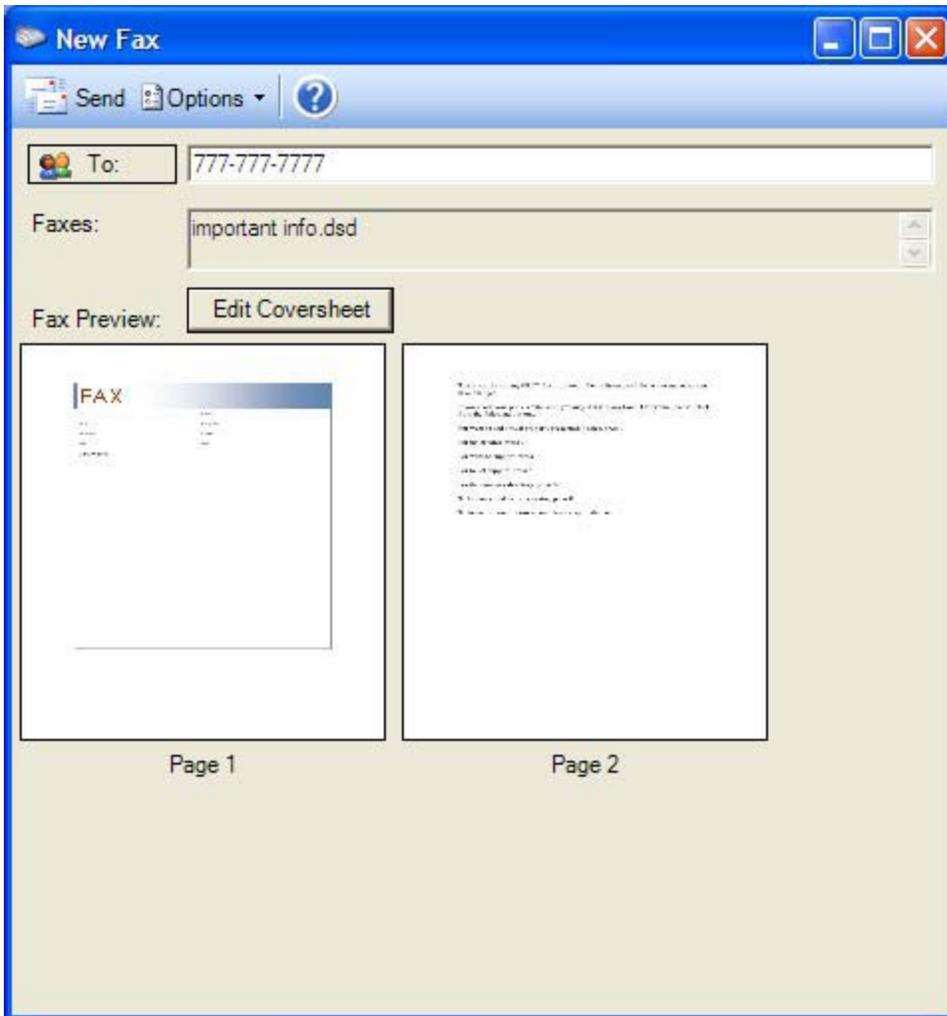
FAX

Overview

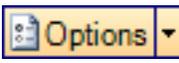


Your Real Estate Dashboard contains an integrated Fax utility, allowing you to send and receive faxes. You can fax documents in your vault to any of your contacts, and receive faxes through a dedicated toll-free number assigned to your Real Estate Dashboard account. Received faxes are stored in your Vault, eliminating the need to carry around stacks of paper.

Sending a FAX



To send a document in your Vault by fax:

1. Open a document in your vault, then click on the "Send by Fax" button  in the toolbar.
2. The "New Fax" window will appear. In the "To" field, enter the fax number you wish the fax to be sent to. Multiple fax recipients can be specified by separating fax numbers with a semicolon.
Alternatively, you can click on the "To" button and select fax numbers from your contacts.
3. Click the "Edit Coversheet" button to fill out the fax coversheet. If you do not wish to send a coversheet, click on the "Options" button  and uncheck the "Cover Page" option.
4. When you are ready to send the fax, click the "Send" button .

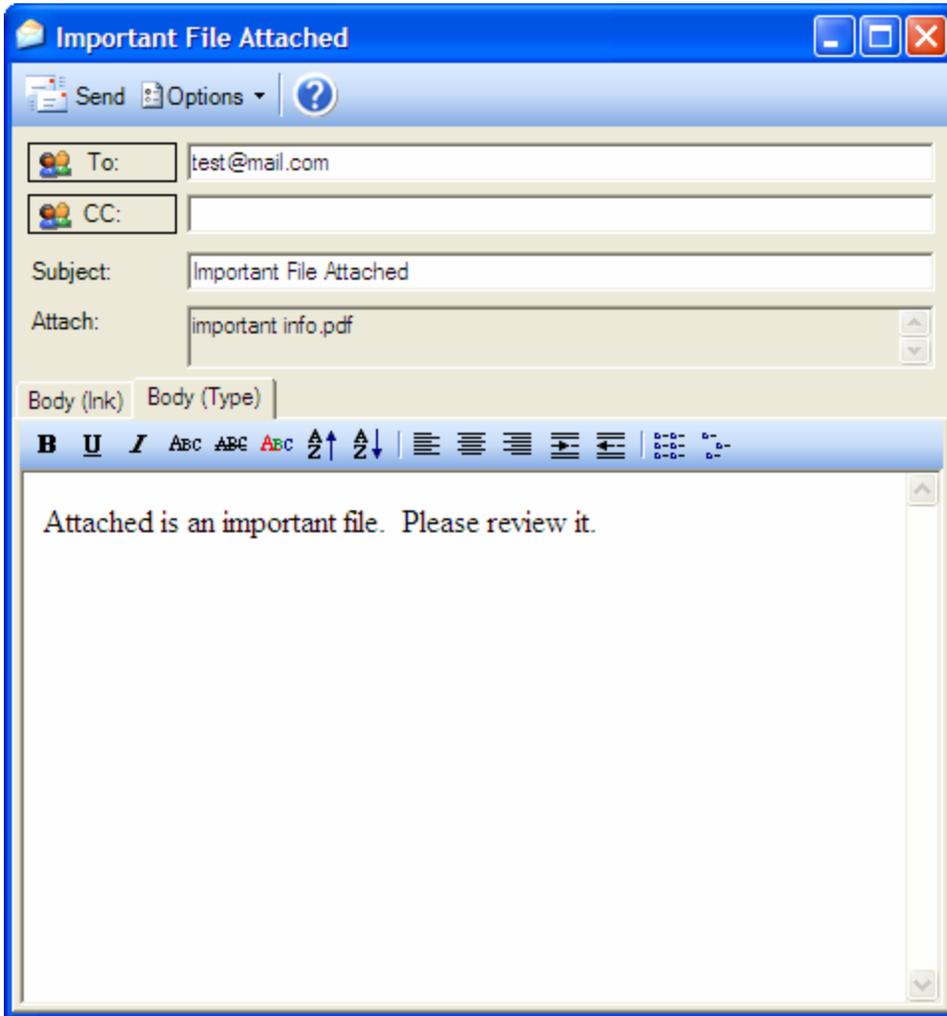
Receiving a FAX

When you signed up for a Real Estate Dashboard account, you were assigned a dedicated toll-free fax number. Faxes sent to this number will be automatically stored in your vault. If you receive a fax while Real Estate Dashboard is open, a small pop-up notification will appear in the lower right-hand corner of your screen alerting you to the new fax.

To view faxes, click on the "Faxes" button  in the navigation bar. You will see a list of all the faxes you have received. You can also create subfolders in this view, allowing you to sort and organize faxes you have received.

Saving a FAX in Your Vault

E-Mail





Real Estate Dashboard allows you to send documents in your Vault as e-mail attachments. Attachments are sent in the Adobe Acrobat format. Documents in your Vault can be e-mailed to any person with a valid e-mail address.

Please note that Real Estate Dashboard is not designed to replace your current e-mail client software (i.e. Microsoft® Outlook® or Outlook Express). The e-mail features within Real Estate Dashboard are intended to provide you an easy way of sending documents to e-mail recipients without having to export documents from your Vault first.

Sending Vault Files via E-Mail

There are two methods for e-mailing documents within your Vault:

Method 1

This method of sending e-mail involves selecting files in your Vault file list and clicking the "Send

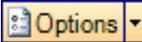
File to Email Recipient"  button. You can select multiple files by either holding the shift or control key and clicking on the files you want to send, or you can use your mouse or tablet stylus to right-click and drag a selection box over the files you wish to select.

Method 2

You can also easily send individual files via e-mail by right-clicking the file you wish to send and selecting the "Send To  Email Recipient" menu option.

E-Mail Options and Sending

Once you have selected the files you wish to send, you will be presented with the e-mail dialog box (displayed above). To send to contacts that you have saved in your Real Estate Dashboard, click on either the "To" or "CC" field buttons to select from your contacts. Otherwise, type in valid e-mail addresses in either the "To" or "CC" fields. Separate multiple e-mail addresses with a semicolon (;).

If you wish to send blind carbon copies (BCC), click on the "Options"  button and check the "BCC" option to enable the BCC field. Once this field is enabled, it can be treated the same as the "To" and "CC" fields.

After you have set all of the options and specified recipients, send the e-mail by clicking on the

"Send"  button.

Notes

E-mail sent through the Real Estate Dashboard will appear to come from the e-mail address used to register the product with GoPaperless, Inc. If your e-mail address changes, contact REDSupport for assistance.



Digital Ink

Overview

Real Estate Dashboard offers digital ink features for owners of Tablet PCs using Microsoft's Windows XP® Tablet PC Edition. Real Estate Dashboard adopts the same digital ink functionality of applications such as Microsoft® OneNote®. There are several pen and highlighter tools to choose from when working with your documents within the vault. There is also a document zoom feature that is optimized to be easy to use on a Tablet PC.

Eraser Limitations

In order to guarantee the integrity of documents that are digitally signed using Real Estate Dashboard, the eraser function has been deliberately omitted. By eliminating the eraser, the possibility of client data or signatures being digitally doctored or changed is greatly reduced.

Digital documents are intended to be treated just as a paper document. For example, with paper contracts, it is an accepted practice in the event of a mistake to cross out and initial the mistake. With Real Estate Dashboard, the same is true; however you can easily start over by opening a fresh copy of the document from your vault. No need to waste paper and no need to carry around multiple copies of the same form.

Document Security

Documents you sign using Real Estate Dashboard are far more secure than any document signed on paper. Once you save, fax, or e-mail a signed document from Real Estate Dashboard, the signature and all other digital ink is "rasterized" onto the document. That is, the digital ink is compressed and sealed into the document in such a way that the resulting PDF file CAN NOT be modified under any circumstances.

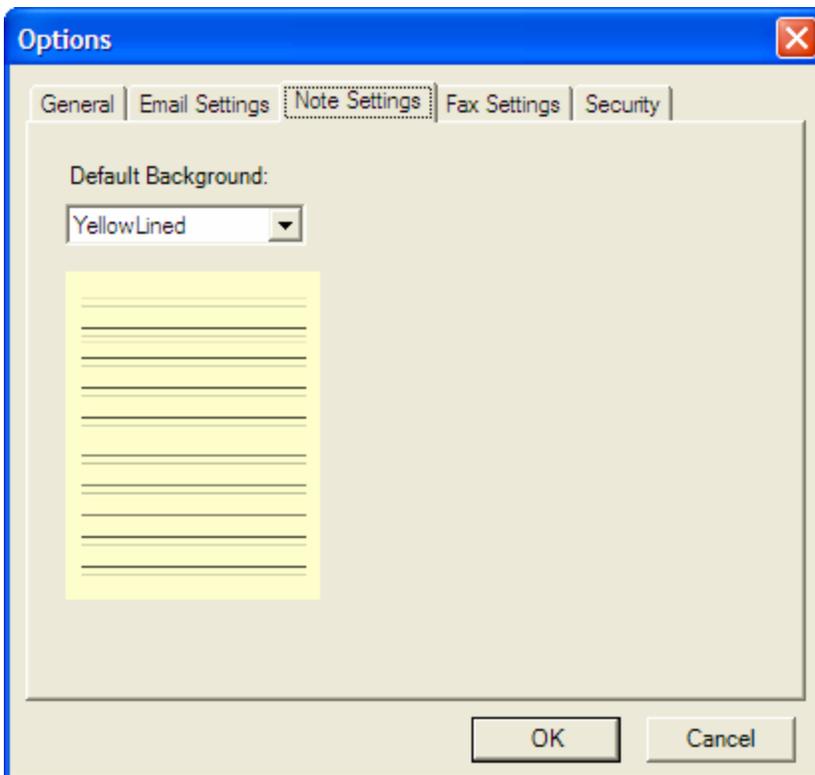
Also, just like paper, you can always add ink to a document, but you cannot change what is already there.

Notes

If you own a Tablet PC, you can utilize the Real Estate Dashboard Note tool. This tool functions similarly to Microsoft OneNote or Journal Viewer. The main difference is that notes taken within Real Estate Dashboard can be saved directly to your Vault, and can then be faxed, e-mailed, or saved to your desktop.

Unlike the Digital Ink Editor, the Notes feature of Real Estate Dashboard does allow you to erase digital ink using the eraser tool.

You may set the default "paper" appearance by clicking on the "Tools" menu and selecting "Options" In this dialog, select the "Note Settings" tab (shown below):



Use the drop-down box to select your preferred note background, then click the "OK" button to save your changes.