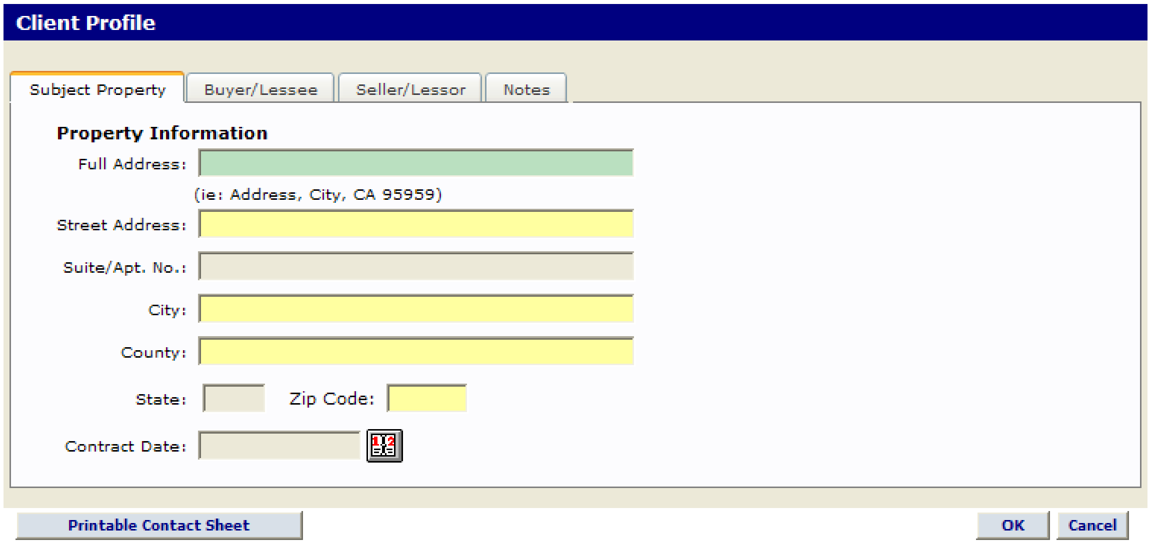
Using the Client Module to Auto Fill Forms

Note; if you do not have the Acrobat Reader version 6 or newer installed on your computer, you will need to download it from the Adobe website.

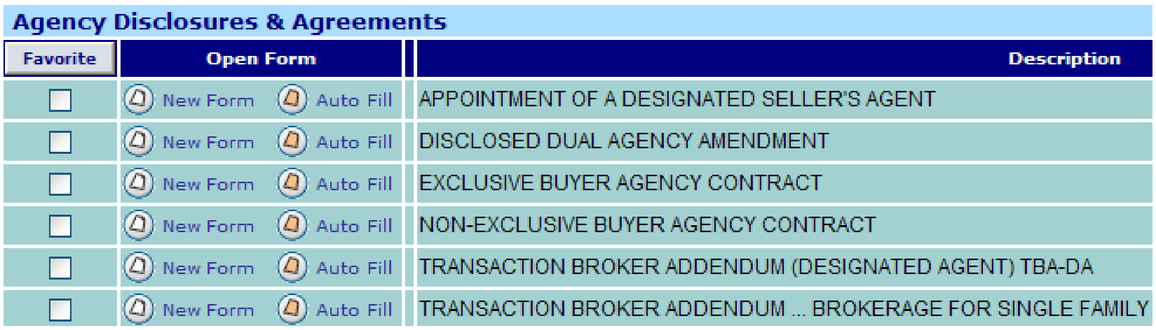
After you log in, click on the “Manage Clients” tab located just under the KCRAR logo. When the new window opens, click on the green button labeled “Add New Client”. Complete a client profile for a seller and the subject property, a buyer, or a buyer with a subject property (if a specific property has been identified). After completing the client profile, click “OK” at the bottom right.



The client has now been added for you to use now and in the future and will show up in your Clients list.

Click the “Forms List” tab to view all KCRAR forms.

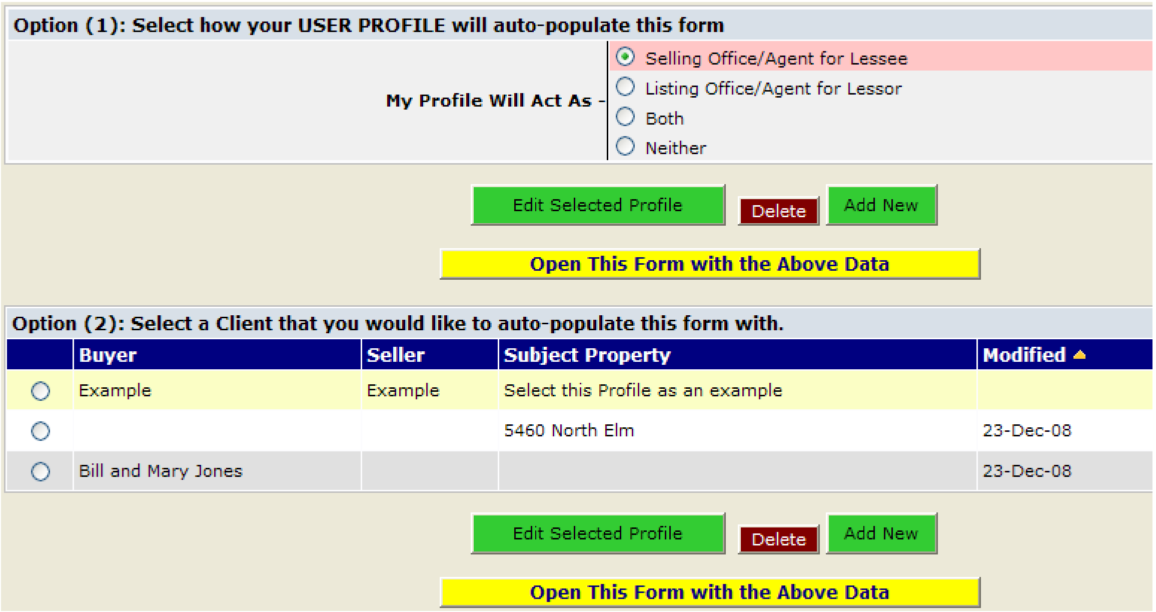
Select the form you would like to complete by clicking on the “Auto Fill” link (see example below).



Agency Disclosures & Agreements

Favorite	Open Form		Description
☐	New Form	Auto Fill	APPOINTMENT OF A DESIGNATED SELLER'S AGENT
☐	New Form	Auto Fill	DISCLOSED DUAL AGENCY AMENDMENT
☐	New Form	Auto Fill	EXCLUSIVE BUYER AGENCY CONTRACT
☐	New Form	Auto Fill	NON-EXCLUSIVE BUYER AGENCY CONTRACT
☐	New Form	Auto Fill	TRANSACTION BROKER ADDENDUM (DESIGNATED AGENT) TBA-DA
☐	New Form	Auto Fill	TRANSACTION BROKER ADDENDUM ... BROKERAGE FOR SINGLE FAMILY

The next window has two sections. The first section (Option 1) asks if you are the agent assisting the seller, the buyer, or both. Make your selection as to which party you are representing/assisting. In the next section (Option 2), select the buyer profile or the seller profile you intend to use to complete the form. Once you have selected the client profile, click the second yellow button titled, “Open This Form with the Above Data”.

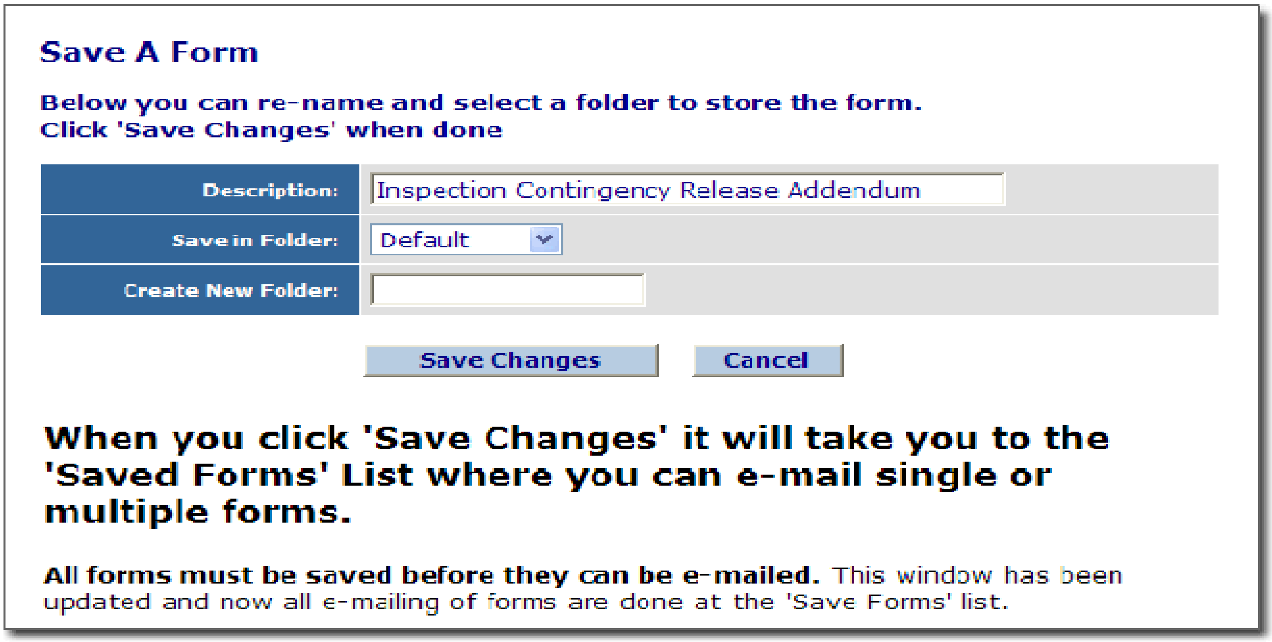


The software will complete all areas of the form that are applicable. Complete the other data fields or save to complete later.

You can print the form at any time by clicking on the yellow “Print” button at the top or bottom of the page.

Saving a Completed Form:
When you are finished working with the form, click the “Save This Form” button at the top or bottom of the form page.

After clicking on the “Save This Form” button you will be taken to the "Save a Form" page. This page contains all the additional information that will be needed to save the form.



Most of the fields will automatically be filled in with default values.
Each item is described in detail below:

• **Description** - The default form name is entered automatically here. If you would like to change it to something more descriptive, enter it here.

• **Save in Folder** - The pull-down list shows all the folders available.

• **Create New Folder** - Enter a new folder name here. If you enter anything in this box, the "Save in Folder" pull-down selection above is ignored. One recommendation is to use the property address or the client name as folder names. When you save various forms they can be grouped into the appropriate folder to keep related items together; example, “Smith Listing” or “Jones Purchase”.

The form has now been saved and will be available to you when you log back in. The completed form will be available for 365 days from the date of the last modification you made to the form. You can now print the completed form or email the form. Whatever you do, the completed form is saved for 365 days unless you choose to delete it.

More information that may be helpful:

The Favorites Checkbox: To add a blank form to a special folder called “Favorites” to find it easier the next time you need it, click the checkbox in the favorites column next to the form name(s) you want to add, and click “Favorites” at the top or bottom of the list. You'll then see your favorite (or most commonly used forms) appear in a new folder at the top of the forms list.

Questions or Problems?

After logging into the Professional Computer Forms website, click on the “Help” tab to view the “Frequently Asked Questions” or click on the “Contact Tech Support” link at the bottom of the drop-down list.