Frequently Asked Questions

SkySlope

Getting Started for Agents
https://support.skyslope.com/hc/en-us/articles/218288017-Getting-Started-for-Agents

Creating a Listing
You'll need to create a Listing within SkySlope when you're representing the seller or landlord of a property that is for sale or for lease. When you're creating your Listing, you will input some basic information (such as the listing & listing expiration dates, sale price, seller's name(s) and contact information). After you've submitted this information, you'll be taken to the Checklist for that file.

Each file has its own Checklist, which is a list of documents that your office has deemed pertinent to the type of file you're creating (which is based off the Checklist Type you select on the first page of creating your Listing, such as "lease" or "listing"). The documents on the Checklist that are listed as Required must be uploaded and submitted for review before you're able to "Accept a Contract" within SkySlope, and convert your Listing file into a Transaction file that your admins can close out. This guide will show you how to create a Listing.

> **Q:** I am currently not able to create a Listing in SkySlope. What is the workaround?
> **A:** All registered users have been given access to create Listings/Transactions. If you are not able to do so, please contact SkySlope support as it may be an isolated incident. SkySlope is available 24/7
> https://support.skyslope.com/hc/en-us
> **Q:** Can I add a Co-Listing Agent?
> **A:** The field is currently unavailable. SkySlope is working on a workaround. In the meantime, contact SkySlope to have the Co-Listing Agent added.

Learn How to Create a Listing: https://support.skyslope.com/hc/en-us/articles/218092138-How-to-Create-a-Listing

Creating a Transaction
You'll need to create a Transaction within SkySlope when you're representing the buyer or tenant of a property. When creating your Transaction, you will input some basic information (such as the acceptance date, agreed price, your buyer's name and contact information, and commission information). Once you've submitted this information, you'll be taken to the Checklist for that file.

Each file has its own Checklist, which is a list of documents that your office has deemed pertinent to the type of file you're creating (which is based off the Checklist Type you select on the first page of creating your Transaction, such as "lease" or "traditional sale"). The documents on the Checklist that are listed as Required must be uploaded and submitted for review before your office is able to close our SkySlope Transaction file. The guide below will show you how to create a Transaction.

> **Q:** I am a Transaction Coordinator and created a transaction for an Agent. How can I change the transaction to the Agent's name?
> **A:** Under Transaction, Transaction Info Tab, select the drop-down menu next to Agent and select the Agent's name. Agents are listed in Alphabetical order starting with their last name. (Note: You will only have access to Agents linked to the Office you are assigned. If the Agent has not registered in zONE, their name will not appear on the drop-down menu). Confirm with the Compliance Manager that the Agent's

account has TC Access enabled. This will allow the TC, who created the transaction, access to the file once it has been reassigned to the Agent's name.

Learn How to Create a Transaction: https://support.skyslope.com/hc/en-us/articles/218689137

Convert a Listing
Once you've created a Listing in SkySlope and your sellers have accepted an offer on the property, it's time to convert your Listing into a Transaction. You must convert your Listing into a Transaction for your office to be able to close your SkySlope file at Close of Escrow. Look to see how to properly convert your file.

Learn How to Convert a Listing into a Transaction: https://support.skyslope.com/hc/en-us/articles/212364907-How-to-Convert-a-Listing-into-a-Transaction

Cancel Transaction and Re-Activate Listing
When you're representing the seller, sometimes the buyer backs out and you need to cancel the Transaction file. However, since your Listing is still active, we don't want to cancel the whole file. In this case, what we want to do is cancel the Transaction file and reactivate the Listing file. This will allow us to accept a few offer on the property. This guide will show you how to do just that.

Learn How to Re-Activate a Listing as an Agent: https://support.skyslope.com/hc/en-us/articles/212365047-How-to-Reactivate-a-Listing-as-an-Agent

Closing a Transaction
From your SkySlope home page, click on Transactions, locate the file you're ready to close, and double click the property address to open the file. In the lower left corner, you will see the agent's projected closing date; as the admin, you need to click the Escrow Now Closed button in the upper right corner to enter the actual date. You will now see a pop-up for you enter the actual closing date; to quickly archive the file, check the Archive File box on the right side; Click OK. You will see a pop-up window prompting you to type in a reason for closing & archiving the file; type in your reason (optional), and click Submit

> **Q:** Not all closed transactions display under Closed Transactions to be Archived under Manage Transactions. Is there another way to access Closed Transactions that need to be Archived?
> **A:** Yes, you can access Closed Transaction for the month on the main dashboard, under "Closed this Month." Archived files can be found by click on Access Archives from the SkySlope home page.

Learn how to Close-Archive a Transaction: https://support.skyslope.com/hc/en-us/articles/212365447-How-to-Quickly-Close-and-Archive-a-Transaction

Withdraw a Listing
If you've created a Listing within SkySlope that didn't sell and your sellers didn't renew the Listing Agreement, most likely you will need to withdraw your Listing. When you withdraw your Listing, it will be moved to a "cancelled pending approval" status, which means you're waiting for an admin to approve the cancellation and move it into the Cancelled Contracts section of SkySlope.

> **Q:** Where can I upload the Cancellation of Listing?
> **A:** We are currently working on getting the Cancellation of Listing tab added to ALL Listing Checklists. We will notify ALL staff when it becomes available. Workaround, add to the Listing Agreement Tab for file auditors to approve cancellation.

Learn How to Withdraw a Listing: https://support.skyslope.com/hc/en-us/articles/212364927-How-to-Withdraw-a-Listing

Cancel a Transaction
Sometimes, deals fall through. Buyers back out. When this happens, you're going to want to cancel your Transaction. The guide below will show you how to cancel your SkySlope transaction.

Learn How to Cancel a Transaction: https://support.skyslope.com/hc/en-us/articles/212364957-How-to-Cancel-a-Transaction

DigiSign Sending Process
DigiSign is probably one of the most time-saving features offered to you with your SkySlope account. You can use DigiSign to send contracts and documents to your client to sign online from virtually any device with internet access.

> **Q:** Am I able to send multiple documents from DigiSign that are not necessarily related to the same transaction?
> **A:** Yes, you can do so by accessing Working Documents. Agents or 3rd parties can email documents to either the office general inbox or your personal docs. Through Working Docs you can send envelopes for the documents that need a signature. Once received, you can split and assign them to the correct transactions.

Learn How to Send Documents through DigiSign: https://support.skyslope.com/hc/en-us/articles/212366307-DigiSign-Sending-Envelopes

DigiSign Signing Process
We've made the DigiSign signing process as straight-forward and simple as possible. If you'd like to see what your signers see on their end.

Learn How to Sign DigiSign Documents: https://support.skyslope.com/hc/en-us/articles/212366297-DigiSign-Signing-An-Envelope

Upload Documents
In each file, you create in SkySlope, there will be a list of required documents to be uploaded and submitted to for review. There are a few different ways to upload documents into SkySlope. Take a look at the following guide to see the different upload methods, and give it a shot to determine which best fits your work-flow.

> **Q:** Where can I upload miscellaneous documents that I want to keep for the transaction, but are not necessarily required?
> **A:** The checklist tabs only pertain to documents required by the BRE and/or Broker. If there are other documents you'd like to add to the transaction, you can do so by adding them to the document library or any miscellaneous tabs.

Learn How to Upload Documents: https://support.skyslope.com/hc/en-us/articles/212365017-How-to-Upload-Documents

Audit an Agent's Checklist
The best practice to use is to go in to the Docs to Review section located on the Home page, find the property file you wish to review, and once done reviewing, click the Docs to Review button on the property file's Checklist. This will return you to the main Docs to Review section and allow you to quickly move on to the next property file to review.

> **Q:** I accepted an incorrect document by mistake, how can I get it corrected?
> **A:** In the event the auditor accepted a document by mistake you should Click the "Unaccept" Button on the incorrect checklist item to reverse the acceptance and put the item back up for. You can visit the tutorial video: https://support.skyslope.com/hc/en-us/articles/212365367-I-accepted-an-incorrect-document-by-mistake-

Q: I am not able to open documents that have been uploaded for review
A: When auditing a file, the checklist item will reflect in red "pending" with a paper clip icon available on the right. (NOTE: Selecting the "X" will remove any attached documents that were assigned). Ensure your Browser setting is accepting ALL pop-windows from SkySlope and should provide the PDF file for review.
Q: As an auditor, how can I waive a document?
A: Only documents that are required are waivable by selecting "not required." If Applicable documents apply, you can change to "must upload."

Learn How to Audit an Agent's Checklist: https://support.skyslope.com/hc/en-us/articles/212365407-How-to-Audit-an-Agent-s-Checklist

Learn How to Unreject a Document: https://support.skyslope.com/hc/en-us/articles/212365417-How-to-Unreject-a-Document-

Split & Assign
Sometimes you'll end up with large packets of documents that are all in a single PDF that need to be split into smaller PDFs and placed on the Checklist. For example, you sent your Listing Agreement, Seller's Disclosures, and Lead Based Paint Disclosure all in the same DigiSign envelope to be signed. When it's signed, they'll all come back as one PDF, but those three documents all have different spots on the checklist. You can use our Split & Assign feature to split them up and assign them directly on the Checklist. Keep reading to learn how.

Learn How to Split and Assign: https://support.skyslope.com/hc/en-us/articles/212365687-How-to-Use-Split-Assign

Email Documents Out of SkySlope
SkySlope is your go-to place for document storage; you no longer must keep them on your hard drive or in dozens of loose files. Now that you're keeping your documents in SkySlope, we've given you an easy way to send them right out of SkySlope to wherever they need to go via email. Read the following guide to learn how.

Learn How to Email Documents out of SkySlope: https://support.skyslope.com/hc/en-us/articles/212364877-How-to-Email-Documents-Out-of-SkySlope

Remove Incorrect Documents from Checklist
We all make mistakes. Sometimes we accidentally attach the wrong document to a Checklist item. Here's a straight-forward guide that will show you how to replace the wrong document with the correct document.

Learn How to Remove Incorrect Documents from Your Checklist: https://support.skyslope.com/hc/en-us/articles/212364947

All About Working Docs
One of the coolest SkySlope features is the Working Documents section (often referred to as "Working Docs"). You can email-into and email out-of working docs; you can upload and store docs; you can send docs straight into DigiSign; and so much more. If you are in need to revise any of your Working Docs please refer to your Office Manager or Compliance Manager.

Change Your Checklist Type
Having the correct Checklist type for your file is essential. The list of documents that are required for your file is directly dependent upon your Checklist type. If you've created a file and you realize that you chose the wrong Checklist type, it's pretty simple to change.

Q: I created a transaction, but the checklist is missing certain required checklist items (i.e. MCA, Modification of Terms, NHD, etc.) or shows duplicated checklist items. How can I get the correct checklist?

A: CA Checklists have been revised as of 02/03/2017. Listings/Transactions created prior to 02/03/2017 will not reflect the correct checklist, unless the correct checklist has been applied.

Learn How to Change Your Checklist Type: https://support.skyslope.com/hc/en-us/articles/212365487-How-to-Change-Your-Checklist-Type-on-a-File

zONE

One.Zone

Q: Are Agents/TCs able to log in directly through SkySlope, without logging into One.Zone?
A: Because zONE is integrated with SkySlope, logging in directly through SkySlope is not available

Q: When will Office forms become available in zONE?
A: Unfortunately, there is not current ETA. The current workaround is to have Agents access company forms through the "Working Documents" section in SkySlope.

Creating a Batch

Q: I am not able to upload a closing package to the batch, is there a workaround?
A: IT is aware of the issue; the following is the current workaround: Upload PDF on comm log page, page will appear to spin, manually refresh page, PDF should appear as a link. If you are still experiencing issues, please contact the Compliance Manager.

Q: There is a delay from SkySlope to zONE when closing a transaction.
A: No, transactions are updated every 5 minutes. You can also use the "refresh transactions" button and enter the closing date of the transaction you are trying to add to a batch.

DBA Names

Q: Can we Add DBA names to zONE?
A: Yes, you can process commission checks under the agent's name because your accounting person will have their W9 on record for the end of the year taxes. Therefore, it's so important to scan all closings/checks and have a CDA in place. Our recommendation is to have an Excel Google Docs spreadsheet entering all DBA names and give special permission to only staff members such as your receptionist, Transaction Coordinator, Compliance Officer, Office Manager. This way, any staff member that receives a W9 with new Company/Agent information is listed on this special list and updated in Zone.

Closed/Archived Files

Q: What is the difference between Closed and Archived Files?
A: Closed transaction means that you are still pending items and Archived transactions means the file is fully complete and there are no items pending to Archive the file. Corrections made to SkySlope after selecting "Closed" or "Archived" cannot reflect Zone because of the status change. It is very important to audit all the data in SkySlope entered for each transaction before changing the status and syncing into zONE. Our recommendations are to always have a breakdown of the commission (CDA – Commission Disbursement Agreement), a copy of the Transaction Fees Structure to assure the correct fees are being collected (office income), settlement package, commission checks, referrals forms (if applicable) for each transaction before processing in SkySlope and creating a Batch in Zone.