Legal Library PRO- Quick Guide

Process Flow: Create Transaction ⟶ Add Document ⟶ Fill out Document ⟶ Edit Document Content (if needed) ⟶ Add Users ⟶ Print or Save to PDF for Signatures

- Information you provide in the transaction details section will auto-fill in your selected documents. Auto-filled information will only show as ___blanks___ and will not be displayed while filling out document details.
- To fill out a document, enter your information in the empty boxes. To edit text outside of the available empty fields, you must save your progress and then select 'Edit Document Content.'
- All edited content will show changes to the boilerplate text by striking out previous text within the document.
- Legal Library PRO automatically tracks all changes made to your documents. View change history by selecting the expand arrow under the text while in the 'Edit Document Content' section.
- You can add different user types to view and edit your forms:
  - **Transaction Users** can access all documents in the entire transaction, add/edit documents and attachments, & copy the transaction.
  - **Document Users** can only access the specific document selected.
  - Both CBA members and non-members may be given user permissions. Only CBA members can be given Transaction Maintenance status.
  - Transaction Maintenance status gives users the ability to add and remove entire documents.

- Your log in will always be your CBA credentials. No other information is required.
- Transactions are folders that contain all of your documents. You must create a transaction before adding or printing your documents.
- You can add attachments as PDFs to the entire transaction or embed JPG images such as a plat map within the document in designated areas. If embedding is available, you will see that option by selecting the + sign in the 'Edit Document Content' section.
- To add your office or personal logo, email us at support@commercialmls.com.
- Save time on future forms by copying previous transactions -- just select the copy icon.
- Create custom office templates by selecting 'templates' from the top banner. You must copy the master template before you will see the option to 'Edit Template Content.' Only published templates can be used, but keep in mind that once a template is published, it can't be edited further. If there is an error, you must create a new template or manually modify it once you've added it to your transaction. It is a best practice to include a template description in your new form.
- Need further assistance? Please see our video tutorials at Commercialmls.com