

SAR Forms Solution Provider Change – Announcement and FAQ for Designated and Managing Brokers Revision 8/7/2015

The SAR is changing forms providers from Zipform to Instanet. The new solution from Instanet is their TransactionDesk suite. This includes forms, document storage, transaction management, and ***digital signatures***, all as an SAR member benefit.

Q. Why is this change taking place?

A. In reviewing forms providers, Instanet provides a robust, cross-platform solution with more options that SAR members are expecting to use at a better price than other solutions.

Additionally, Zipform has not been timely in providing SAR members with current form changes. In the past, due to slow response from Zipform, SAR users were forced to use outdated forms in the course of a transaction.

Q. When will this happen?

A. The SAR is going to have a beta-test group begin work in October for a scheduled November full launch.

Q. How can we get training on this new product?

A. The SAR will be scheduling training sessions for members, as well as offering Train the Trainer sessions and office presentations. Watch our Education bulletin and Weekly Notices for dates and options.

Q. Will my company forms be available?

A. If your company has offices in NWMLS and their forms are available through there, they should be available. We will have an option for your forms to be added at a cost of \$50 per page, but we do not yet have a contact to process these. We will send out a separate notice when we do.

Q. How do I enroll my agents?

A. You will not need to associate your agents with your office, as you did in zipForm. TransactionDesk will use our member rosters and office rosters to associate your members.

Q. What should we do with our existing zipForm transactions?

A. zipForm will no longer be available after the end of the year with our forms. It is recommended that if you have archived transactions in zipForm, you make sure you have local paper or electronic copies. As TransactionDesk becomes available, encourage your members to transfer existing or new transactions to the new system.