planetRE Guide

What is planetRE?

- planetRE is a digital, paperless filing system.
- If you were to use planetRE to its full potential, you would never need to print a paper document.

Getting Setup

- Request login credentials from Liz Ramos (Lizzie@pinprop.com).
- You can start using planetRE once you have received your username and password.
    - We recommend **not** changing your password. Doing so will result in the inability to retrieve your password should you misplace it.

Starting a File

- Complete and submit a sales report at the start of escrow. (The Pinnacle Sales Report can be found on the Resource Page.)
    - You must fill out the entire form in order for your online file to be created. Incomplete information may result in delays.
- On the Pinnacle Sales Report, you must select whether or not you would like to be sent barcode coversheets.
    - Select "Yes" only if you will be manually uploading paper documents to planetRE via scanner.
    - If you are going to upload documents digitally on a computer or if you would rather print coversheets on your own, select "No."
    - Barcode coversheets are only used for manually uploading paper documents.
- It is recommended that you upload documents immediately once they are available. Do not wait until just before the close of escrow as unexpected delays may occur.
- **Do not** wait until just before the close of escrow to upload documents. Doing so may result in delays. Each document must be uploaded immediately after being completed.

Navigating Online

- Go to *planetre.net*
- Enter your login credentials.
- You will be taken to the homepage. Here you can view current transactions, closed transactions, and cancelled transactions.

- All current transactions are listed on the right side of the homepage. The list is sorted by Proposed Closing Date, Incomplete Files, or Property Address. Proposed Closing Date is selected by default.
- If for some reason you are unable to find a transaction, try using the *Search Transactions* function on the left sidebar.
- Select a transaction by clicking on the address. This takes you to the transaction folder.
    - There are six tabs along the top of the page: *Timeline*, *Documents*, *Participants*, *Summary Report*, *Communication Log*, and *Other Tools*.
        - Click *Documents*
            - All document-related functions can be found here. There's *File Review*, *Document Checklist*, *Email Multiple Documents*, *One Click Coversheets*, *One Point Scan*, and *Electronic File Upload*.
            - Beneath that you will see a list of all the documents you have uploaded to planetRE.
            - To view a document, click on the document's name.
            - If you would like to view information about the document, such as who was the last person to view it, click *Details* located next to the document's name.
            - If you would like to change who is allowed to view the document, click *Manage* under Manage Privileges.
                - Check or uncheck the boxes.

Barcodes are used only when scanning paper files to planetRE.
Do not print or use barcodes if you are uploading files from a computer.

Printing Additional Barcodes

- If for some reason you didn't receive a barcode for a specific document, you can easily print it yourself.
    - Select a transaction by clicking on the address.
    - Click *Documents*.
    - Click *One Click Coversheets*.
    - Check the boxes of the documents you want to print barcodes for.
        - If the form you are looking for is not listed, you will need to create a custom barcode. Read "Creating Custom Coversheets."

    - Scroll to the bottom and click *Download*.
    - Open and print the barcode.
        - Try to conserve paper by only selecting and printing the barcodes you need.

Creating Custom Coversheets

- If you did not receive a coversheet for a specific file, first follow instructions for "Printing Additional Barcodes."
- If the coversheet you need is not listed, you will need to create a custom coversheet by following the steps below.
    - Select a transaction by clicking on the address.
    - Click *Documents*.
    - Click *One Point Scan*.
    - Complete the section that says "OR Enter Document Manually."
        - Select a category.
        - Type the official document name.
    - Select who you want viewing the document, for example, Listing Agent, Buyer's Agent, and Seller/Landlord.
    - When you are done, click *Submit*.
    - You can now print the coversheet.

Upload by Scanning

- You must have a barcode coversheet for every document you plan on scanning.
- Match the coversheet with the corresponding document by placing the coversheet on top of the document.
- Scan and email the file to: doc@planetre.net
    - You can scan up to 40 pages at one time.
    - If emailing from home, you may need to modify your scanner settings. Go to "help" at the top of the page.
    - There are representatives online to assist you from 8am-4pm.
- It may take up to 5 minutes for the document to show up online.
- When scanning legal size documents, make sure the scanner is formatted properly as to not cutoff the document.

Electronic File Upload

- Digitally upload a file directly from a computer. Do not use coversheets for this method.

    - Select a transaction by clicking on the address.
    - Click *Documents*.
    - Click *Electronic File Upload*.
    - Select Document
        - Select a category
        - Select the document name from the dropdown menu. The default viewing privileges will automatically be set.
            - If the form you are looking for is not listed, you will need to enter the document name manually.
                - Skip to the section on the screen where it says "OR Enter Document Manually." Select a category, type the official document name, then select who you want viewing the document.
    - You can modify who you want viewing the document by simply checking or unchecking the boxes.
    - Specify File Name
        - Next to "Document File," click *Choose File*. Browse your computer and select the desired document.
            - The file size cannot be larger than 5 MB.
    - Click *Submit*.
        - If you are uploading multiple documents, click *Submit and Upload Next Document* instead.
    - The document should show up instantly. However, it's not uncommon for it to take up to 5 minutes.

Document Checklist

- A document checklist is a list of all the documents that need to be uploaded.
    - Select a transaction by clicking on the address.
    - Click *Documents*.
    - Click *Document Checklist*.
    - When a document has been uploaded into the system, a green checkmark will appear next to the document name. You can also see what time the document was uploaded.
    - Note: The checkmark does not mean the document is complete. It only means the document has been successfully uploaded.

Email Multiple Documents

- Multiple documents can be sent to multiple recipients straight from planetRE.
  - Select a transaction.
  - Click *Documents*.
  - Click *Email Multiple Documents*.
  - Select the documents you want to send.
    - Check the boxes next to the document names.
  - Select email recipients.
    - Under "List of Participants," select a participant's name and then click *To: ->*, *Cc: ->*, or *Bcc: ->*.
    - If you want to send an email to someone not listed under "List of Participants," enter his or her email address under "Additional Email Recipients."
  - If you would like to add a message to your email, type your message in the "Remarks" section.
  - Click *Email Selected Documents*.

File Review

- This is where you can track the progress of your uploaded documents.
  - Select a transaction.
  - Click *Documents*.
  - Click *File Review*.
  - Listed are all the documents that have been uploaded.
  - When a document has been completed properly you will see checkmarks in the "Fully Executed" and "Final Review" columns.
  - If there is a checkmark in the "First Review" column, the document has not been executed properly. There should be an explanation under Reviewer's Comments.
  - Documents that are not yet received.
    - If there isn't a checkmark next to the document name in the "Not Applicable" column, the document must be uploaded.
    - If the document does not apply to the transaction, upload a PDF that says "This does not apply."
  - All other notes show up in the "Remarks" section.

Additional Features

- Manage Assistants
    - You can allow assistants to access transactions from your account. Click *Manage Transactions*, enter the person's information and click submit. Their name will now appear under *Previously Added Assistants*.
        - If you wish to remove the assistant, click the calendar, choose a date, and click *terminate*.