



# EZ Coordinator™ Version 2007

## Quick Start Guide

### Welcome to EZ Coordinator Version 2007!

The *Quick Start Guide* is designed to show new users how to quickly begin using EZ Coordinator to enter and manage real estate transactions. You will learn how to enter contacts (buyers and sellers) and affiliates (vendors) into the database, customize a transaction schedule template, how to enter a new transaction, and output reports and mail-merge letters. You will learn about several built-in, powerful features and shortcuts that promote user-friendliness throughout the use of the software.

### This Quick Start Guide includes the following helpful Instructions:

- I. Creating New Contact and Affiliate Records
- II. Entering a New Transaction
- III. Outputting Reports
- IV. Customizing Schedule Templates
- V. Receiving Additional Help



Main Program Logon Screen

## I. CREATING NEW CONTACT & AFFILIATE RECORDS

### 1. Entering Contact Records for Buyers or Sellers into the Database

- Click the **Contacts** button from the Toolbar.
- Click the **New Contact** button (from the button set on the upper left of the screen). The “New Contact” window pops up for entering the name of a contact (buyer or seller).
- Type the first name and last name of a buyer or seller for the first transaction you will be setting up later. Click the **Create** button.
- Enter a company name if the buyer or seller has a company name that needs to be recorded. The **Manage Companies** button is for editing company names that have previously been entered into the database.



- In the Salutation field, type how you would address the contact in a custom form or letter. The value in this field is what merges into a custom form template after the word “Dear”. EZ Coordinator provides a library of over 40 Custom Form letter templates that are ready to use for different purposes.
- Next, type the zip code for the contact’s Primary Address. To save you time, when you click your cursor into Address Line 1, EZ Coordinator will pull the City and State values, from a postal lookup table built into the software.
- If the Primary Address is the same address you would mail to, then click the **Copy Address** button to copy the field values previously entered for Primary Address, down to the fields below for Mailing Address. Otherwise, type in a separate address of the contact’s mailing address.



Copy Address Button

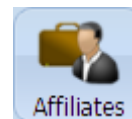
- Type whole numbers only for phone and fax numbers. When you click into the next field, EZ Coordinator formats the phone or fax number entered, so that all numbers appear uniform throughout the program and within the reports and letters that are outputted. EZ Coordinator’s phone and fax number fields are formatted to accept international numbers.
- Type in the contact’s e-mail, if any. And enter any notes for this contact.
- When finished adding information for the new contact, click the **Save Contact** button located on the upper left side of the screen. The new contact’s name will be added to the list box of contacts (on the left side of the screen of the Contacts section) and filed in alphabetical order by last name.
- Later, will either “Assign” contacts already entered into the Contacts section to a new transaction, or will add the buyers and sellers from the Transactions section as you are setting up a new transaction.
- Once assigned to a transaction, you will set the contact’s role as a *Primary Buyer, Co-Buyer, Primary Seller, or Co-Seller*.
- The instructions below describe a time-saving shortcut for adding spouses to the database.

## 2. Duplicating a Contact Record

- Spouses can be entered into one contact record if there is little information to record and store, in cases where you have separate work phone and fax numbers, e-mail addresses, etc., for a spouse. You can enter the initial husband or wife’s contact record to the database, and while you have this contact’s record selected from the list box of contact names, click the **Copy** button located on the upper left side of the screen..
- A new contact record will appear that copies information from the record that was selected prior to clicking the Copy button. The values copied are Last Name, Primary Address fields, Home Phone and Home Fax Numbers.
- Next, type in the first name of the spouse, add any additional fields of information, and click the **Save Contact** button.

## 3. Entering Affiliate Records into the Database

- Click the **Affiliates** button from the Toolbar.
- Click the **New Affiliate** button (from the button set on the upper left of the screen). The “New Affiliate” window pops up for entering the name of a business affiliate (vendor).
- Begin by adding a record for yourself to the database. Type your first and last name. Enter a company name if the name is not already in the database, otherwise you can select the company name from the pull-down menu here, then click the **Create** button.
- In the Salutation field, type how you would address the affiliate in a custom form or letter. The value in this field is what merges into a custom form template after the word “Dear”.
- Next, use the Affiliate Types pull-down menu to select the type of affiliate you are adding (Agent, Home Inspector, Escrow, Lender, etc.). NOTE: This very important step helps file



affiliates into categories within the database where they are easy to filter from later. Setting each record's Affiliate Type allows EZ Coordinator to automatically set the Affiliate's "Role" when the affiliate is later assigned to a transaction. You will learn more about *Affiliate Roles* later in this Guide.

- Next, type the zip code for Primary Address. To save you time, when you click your cursor into Address Line 1, EZ Coordinator will pull the City and State values, from a postal lookup table built into the software.
- If the Primary Address is the same address you would mail to, click the **Copy Address** button (same style button in the Contacts section mentioned above) to copy the field values previously entered for Primary Address, down to the fields below for Mailing Address. Otherwise, type in a separate address of the contact's mailing address.
- Type whole numbers only for phone and fax numbers. When you click into the next field, EZ Coordinator formats the phone or fax number entered, so that all numbers appear uniform throughout the program and within the reports and letters that are outputted. EZ Coordinator's phone and fax number fields are formatted to accept international numbers.
- Type in the contact's e-mail, if any. And enter any notes for this affiliate.
- When finished adding information for the new affiliate, click the **Save Affiliate** button located on the upper left side of the screen. The new affiliate's will be added to the list box of affiliates (on the left side of the screen of the Affiliates section) and filed by first name (if last name was excluded), last name, or company name (if both first and last name were excluded).
- Repeat the above process to continue adding the affiliates to the database that you will be working with regularly. Later, you will learn how to "Assign" the affiliates, already in the Affiliates section, to a new transaction and how to set each affiliate's "role". For example, an agent's role can be set as Seller Agent, Buyer Agent, Referral Agent, etc.
- The instructions below describe a time-saving shortcut for adding multiple affiliates to the database who share the same Company Name, Primary Address, Work Phone and Work Fax numbers.

#### 4. Duplicating an Affiliate Record

- An Affiliate record can be "copied" using the **Copy** button located on the upper left side of the screen. This is a time-saving shortcut that allows repetitive information such as the company name, primary address, work phone and work fax number to be copied from an existing affiliate record into a brand new record are creating for someone who works at the same office as another affiliate already in the database.
- Select the affiliate record to copy from, from the list of affiliates on the left side of the screen and click the **Copy** button. Use the handy *Quick Search Field* to type a few character of the last name of the affiliate you wish to locate.
- Next, complete any additional fields of information, and click the **Save Affiliate** button.

## II. ENTERING A NEW TRANSACTION

### 1. Beginning a New Transaction – Transaction Information Screen

- Click the **Transactions** button from the Toolbar.
- Type an "ID" for the new transaction into the *New Transaction* pop-up window and click **Create**.



NOTE: Using the subject property street name, followed by house number, allows the list box of transactions (to the left of the Transactions screen) to list your transactions in alphanumeric order by street name. Using a convention like this makes it easy to search and find transactions later. In several areas of EZ Coordinator, a "Quick Search" field is present in which you can type the first few characters of the transaction you are trying to locate.

- Select the Transaction Type from the pull-down (filter) menu of choices. The choices are Listing, Sale, and Other.  
NOTE: The Transaction Type filter allows you to run separate reports for Listings and Sales. Any transaction marked as “Other” will not appear in a report of Listings or Sales.
- Select the Transaction Status from the pull-down (filter) menu of choices. The choices are Active, Closed, Cancelled, Expired, Inactive, Pending, Pre-Pending, and Withdrawn.  
NOTE: This filter allows you to run Listing or Sales “Summary” reports by Transaction Status. You can also perform a search for transactions by status from the Toolbar’s Search section.
- Next, type the zip code for the Subject Property Address. To save you time, when you click your cursor into Address Line 1, EZ Coordinator will pull the City and State values, from a postal lookup table built into the software.
- Type whole numbers only for the Price, Initial Deposit (Earnest Money), Increased Deposit, and Credits (credits from seller to buyer at closing). When you go to the next field, EZ Coordinator formats the currency values with dollar signs and commas.
- Most of the common fields for recording real estate MLS, property info, sales, and loan data are present. Additionally, there are fields present for entering commissions, commission splits, referral fees, and coordination fees. Important information stored here can later be output from the *Reports* and *Custom Forms* sections of EZ Coordinator.

## 2. Transaction Schedule Screen — Assigning a Schedule Template to a Transaction

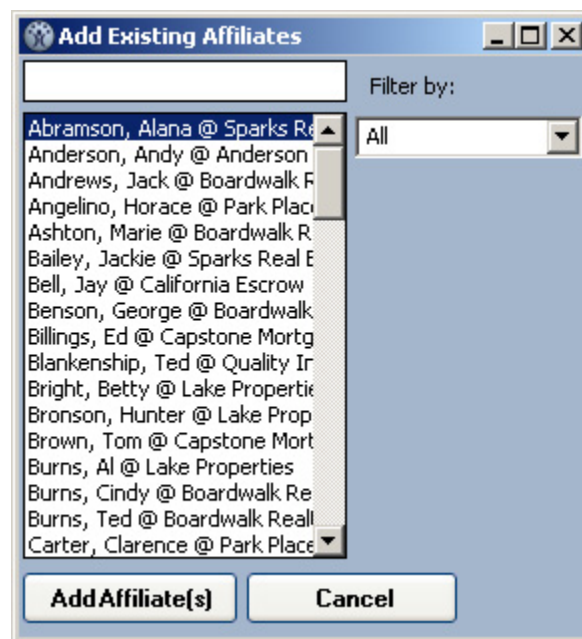
- Click the **Schedule** tab within the Transactions section.
- Select a Schedule Template to use from the Schedule pull-down menu of choices.  
NOTE: EZ Coordinator ships with preformatted schedule templates that can be customized, in the Schedules section from the Toolbar, to fit your specific needs. Also, new schedule templates can be created. For tips on customizing or creating your own schedule templates, see the section of this guide to follow called *Customizing Schedule Templates*.
- Select the contract acceptance date with the Contract Date calendar control.
- Select the contract close date with the Close Date calendar control.
- Make any needed adjustments to the transaction schedule. Adjustments may include deleting unneeded task lines; inserting new task lines; dragging and dropping task lines to a new location using the mouse cursor; manually adjusting task line dues dates; marking task lines with completion dates; and adding notes to task lines.

## 3. Transaction Contacts Screen — Assigning Contacts (Buyers and Sellers) to a Transaction

- Click the **People** tab within the Transactions section.
- Click the **Add Existing Contacts** button to assign to this transaction the contacts (buyers or sellers) that were previously entered into the database. From the pop-up control that appears, select the buyer(s) and seller(s) and click the **Add Contact(s)** button. To select multiple contacts at once, hold in the **Ctrl** (Control) key on your keyboard, and select each of the contact to add, and then click the **Add Contact(s)** button.
- Next, select each contact assigned to the transaction and choose the appropriate “Role” for each (i.e. “Primary Buyer”, “Primary Seller”, “Co Buyer”, or Co-Seller”) from the “Role” pull-down menu.
- Or, if you have not yet added the buyer or seller for this transaction to the database, click the **Add New Contact** button and create a new buyer or seller Contact record for each. The new contact will be added to this transaction and to the Contacts section (from the Toolbar) at the same time.
- To edit the Contact Record information from this screen, double-click on the Contact you wish to edit. Make any necessary edits and click the **Save Transaction** button on the upper left side of the screen. The contact’s record within the Contacts section from the Program Toolbar will be automatically updated with any edits made here.

#### 4. Transaction Affiliates Screen — Assigning Affiliates to a Transaction

- Click the **People** tab within the Transactions section.
- Click the **Add Existing Affiliate** button to assign to this transaction the Affiliates that were previously added to the database. “Affiliates” are all your business-to-business contacts, as in vendors (i.e. agents, lenders, home inspectors, etc.). Use the filter pull-down menus provided here to make it easier to locate affiliates of a selected Affiliate Type of Company.
- Select the affiliates for this transaction and click the **Add Affiliate(s)** button. To select multiple contacts at once, hold in the **Ctrl** (Control) key on your keyboard, and select each of the contact to add, and then click the **Add Affiliate(s)** button.
- Or, if you have not yet added the buyer or seller for this transaction to the database, click the **Add New Affiliate** button and create a new affiliate record for each. The new contact will be added to this transaction and to the Contacts section (from the Toolbar) at the same time.



Affiliate Pull-Down Filter Menus

- EZ Coordinator will seek to automatically set each Affiliate’s “Role” for this transaction based on the Affiliate Type each record is categorized under, or based on the previous role setting when the affiliate was last added to a transaction. Upon adding an affiliate, if you need to change the affiliate’s role, you may do so using the affiliate role pull-down menu located to the right of the affiliate’s name.
- The fields for a selected affiliate record may be edited from this screen. Double-click on an affiliate name listed here and make any necessary edits. Then, click the “Save Transaction” button on the upper left side of the screen. The affiliate’s record within the Affiliates section from the Toolbar will be automatically updated with any edits made here.

#### 5. Transaction Terms Screen — Assigning Buyer or Seller Terms to a Transaction

- Click the **Terms** tab within the Transactions section.  
Contract Terms can be assigned to both the buyer and seller. The terms assigned here will show up on the Transaction Information Sheet which can be output for a selected transaction in Reports from the Toolbar.

- EZ Coordinator provides a default list of commonly used contract terms which can be customized. To edit the list of contract terms click the **Term Types** button located below the Contract Terms list. Terms may be added, deleted, or edited.
- To assign a term to either buyer or seller, select a term from the Contract Terms list with the mouse. Hold the left mouse button over the term and drag and drop it onto the screen area (on the left side) for Buyer Terms or Sellers Terms.
- Add a value to the term. The value field for terms contains a currency or non-currency value. If the value is preceded with a dollar sign, the screen will show a running total for the amount of terms due for buyer and seller. The term's value will appear on the Transaction Information Sheet with the dollar sign.
- To add a note to a term, select a term that has previously been assigned as a Buyer Term or Seller Term using the Line Selection control to the left of the term. Click on the **Add Note** button below the list of Buyer Terms or Seller Terms. In the Notes window that appears, type a subject line for the note and then type the note. Click the **Save and Close** button to save the note and close the Notes window. The note will appear within the central Notes screen for the transaction with the source of the notes indicated as "Terms".

## 6. Transaction Notes Screen — Adding, Editing, or Deleting Transaction Notes

- Click the **Notes** tab within the Transactions section.  
NOTE: General notes can be entered and stored here. General notes will display on the Transaction Notes screen with the source indicated as "General". Also, task notes can be added to individual task lines from the program's main Tasks screen or from a transaction's Schedule screen. Task notes will display on the Transaction Notes screen with the source indicated as "Tasks". Notes added to contract terms will display here, as well, with the source indicated as "Terms". The "Transaction Notes" report (in Reports from the Program Toolbar) will allow you to output all the notes for a selected transaction.
- To add a general note, click the **New Note** button at the bottom of the screen. In the Notes window that appears, type a subject line for the note and then type the note. Click the **Save and Close** button to save the note and close the Notes window.
- To edit a note, select the note by clicking the shaded column to the left of the note name so that the note line is highlighted in blue. Click the **Edit Note** button at the bottom of the screen. Edit the note as desired and click the **Save and Close** button to save the note and close the Notes window.
- To delete a note, select the note by clicking the shaded column to the left of the note name so that the note line is highlighted in blue. Click the **Delete Note** button at the bottom of the screen. Click **Yes** to delete the note or **No** to cancel.

## III. GENERATING AND OUPUTING REPORTS

### 1. Generating Reports and Selecting Report Criteria

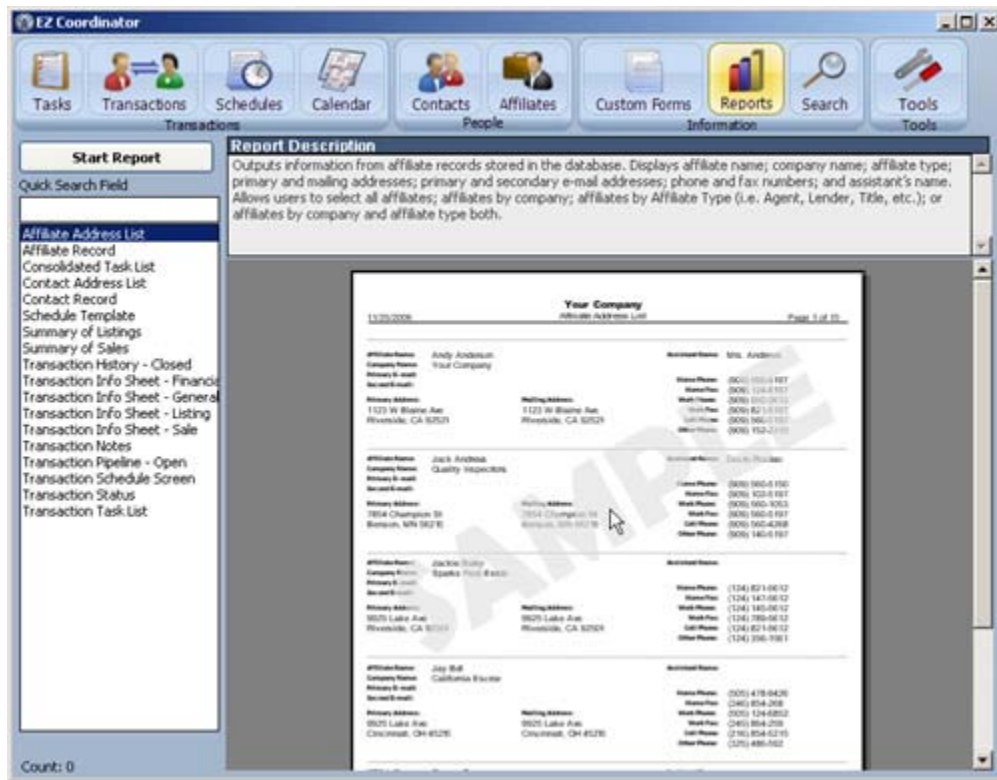


- Click the **Reports** button from the Main Program Toolbar.
- Click on a report name from the list of reports. The report name selected will be highlighted in blue. A brief description and preview of the report layout appears on the left side of the screen.
- To generate a report, select and highlight a report name from the list and click the **Start Report** button located above the list of reports.
- Click your mouse cursor into the "Choose Company Header Label" field and type a few characters of the company name to select for the report header. Then click the down arrow to the right of the field to select the company name.

- o Select any additional report criterion from the fields provided for each report, and click the **Run Report** button. The report generated will appear in a new window.

## 2. Printing, Faxing, or Emailing Reports

- o To print a report, click the **Print** button located in the upper-left of the report window. The Windows system “Print” control window will appear. Select the number of copies to print and click **OK**.
- o To fax a report from your computer, a 3<sup>rd</sup>-party fax software program is required (not included with EZ Coordinator). When the “Print” control window appears (in the above step) select your fax software from the pull-down menu provided.



Reports Screen (from Program Toolbar)

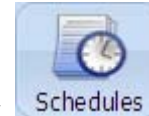
- o To export and save the report as an Adobe Acrobat (.pdf), Excel, HTML, Rich Text File, or Word Document file, select “Export” from the menu at the top of the report window and choose the file format to export to.
- o To e-mail the report\* as an attachment in Adobe Acrobat, Excel, Rich Text File, or HTML format, select “Email” from the menu at the top of the report window and choose the file format to use. From the Recipient Selection window that appears, select the name or names of contacts or affiliates who will be the recipients of the email sent. Click the **Continue** button at the bottom right side of the window to launch Microsoft Outlook. Outlook will launch a new message window with the EZ Coordinator report attached and the recipient’s email already placed in the “To” field of the outgoing message, providing the recipient’s e-mail address could be found in the Contact or Affiliate’s record within EZ Coordinator. Next, type a message for the recipient and click **Send**.

\* EZ Coordinator uses Microsoft Outlook (not Outlook Express), for the above email integration and functionality. The only requirement for utilizing this unique feature is that Microsoft Outlook is installed and configured to work locally on your PC.

## IV. CUSTOMIZING SCHEDULE TEMPLATES

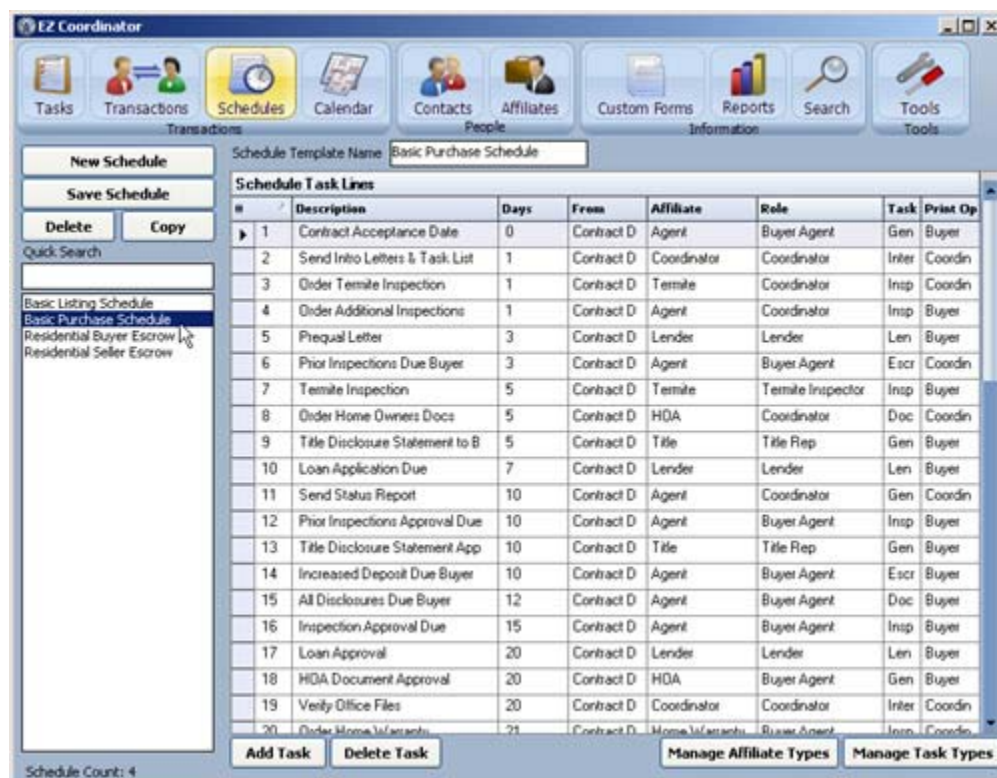
### 1. Schedule Template Options

EZ Coordinator includes boiler-plate Schedule Templates: Basic Listing Schedule, Basic Purchase Schedule, Residential Buyer Escrow, and Residential Seller Schedule. The existing Schedule Templates should be customized to meet your company's specific work flow. An existing Schedule Template can also be copied and given a new name, and then further customizations can be applied in order to create a variation of an existing Schedule Template. Brand new custom Schedule Templates can be created, as well.



Click on the **Schedules** button from the Program Toolbar to access the Schedules (Schedule Templates) section of the program. The following functions are available for customizing schedule templates:

- Create a new schedule template
- Edit a current schedule template
- Delete an existing schedule template
- Copy an existing schedule template
- Add a task line to a schedule template
- Delete a task line from a schedule template
- Manage Affiliate Types
- Manage Task Types



#	Description	Days	From	Affiliate	Role	Task	Print Op
1	Contract Acceptance Date	0	Contract D	Agent	Buyer Agent	Gen	Buyer
2	Send Info Letters & Task List	1	Contract D	Coordinator	Coordinator	Inter	Coordin
3	Order Termite Inspection	1	Contract D	Termite	Coordinator	Insp	Coordin
4	Order Additional Inspections	1	Contract D	Agent	Coordinator	Insp	Buyer
5	Prequal Letter	3	Contract D	Lender	Lender	Len	Buyer
6	Prior Inspections Due Buyer	3	Contract D	Agent	Buyer Agent	Escr	Coordin
7	Termite Inspection	5	Contract D	Termite	Termite Inspector	Insp	Buyer
8	Order Home Owners Docs	5	Contract D	HQA	Coordinator	Doc	Coordin
9	Title Disclosure Statement to B	5	Contract D	Title	Title Rep	Gen	Buyer
10	Loan Application Due	7	Contract D	Lender	Lender	Len	Buyer
11	Send Status Report	10	Contract D	Agent	Coordinator	Gen	Coordin
12	Prior Inspections Approval Due	10	Contract D	Agent	Buyer Agent	Insp	Buyer
13	Title Disclosure Statement App	10	Contract D	Title	Title Rep	Gen	Buyer
14	Increased Deposit Due Buyer	10	Contract D	Agent	Buyer Agent	Escr	Buyer
15	All Disclosures Due Buyer	12	Contract D	Agent	Buyer Agent	Doc	Buyer
16	Inspection Approval Due	15	Contract D	Agent	Buyer Agent	Insp	Buyer
17	Loan Approval	20	Contract D	Lender	Lender	Len	Buyer
18	HQA Document Approval	20	Contract D	HQA	Buyer Agent	Gen	Buyer
19	Verify Dilige Files	20	Contract D	Coordinator	Coordinator	Inter	Coordin
20	Order Home Warranties	21	Contract D	Home Warranties	Buyer Agent	Inter	Coordin

Schedules Section Screen

## 2. Schedule Template Settings Defined

Each Schedule Template has 8 columns. The settings for each of the columns can be customized as follows:

- **Row Selector Control** - The first column is part of the schedule control and is used for selecting and highlighting each task line with your mouse.
- **Line Number** - Each task line is automatically numbered. To move a task line to another position select the task line by clicking on the first column. An arrow will appear as the task line is selected and the entire task line row will be highlighted. As you press and hold the left mouse button over the selected task line and drag, the task line will move to a different place. When you release the mouse button the task line will drop into the new position. Each of the task lines will be automatically re-numbered.
- **Description** - Type in the desired description for each task line.
- **Days** - The number in this field refers to the number of days relative to either the Contract Acceptance Date or Close Date. Once the Schedule Template is assigned to transaction, you will enter both the contract acceptance and close dates for the transaction. Each of the due dates will automatically adjust according to the number of days offset from either the contract acceptance or close date. NOTE: Use a “minus” sign (the hyphen character on your keyboard) before any value you want to set for a number of days before the contract date or close date. For example, entering a value of **Days “-10” From “Close Date”**, would remind you that the task is due ten days before the transaction’s close date.
- NOTE: The Schedule Template can be preset to reflect the timeline of your contracts as close as possible. In addition, once the template is assigned to a transaction, any further adjustments to the number of “Days” can be applied to your current transaction. The timeline will automatically recalculate based on the number of days, relative to either the contract acceptance or close dates.
- **From** - This value refers to which date you are referencing for the number of days in the previous “Days” column (as previously described). The two choices are “Contract Date” (for the contract acceptance date) or “Close Date”. Once you have assigned the Schedule Template to a new transaction, the controls will be present for selecting the actual contract and close dates for the transaction. Once the Days field is set with a number of days, and either the contract acceptance or close date are chosen, the due date for each Task Line will calculate automatically and can be further adjusted as needed.
- **Affiliate** - A pull-down menu in this column allows you to select an Affiliate Type for each task line. The affiliate type is linked to each affiliate that you have chosen for the task. In addition, the contact information for each “linked” affiliate can be accessed from the task line in the main Consolidated Tasks screen and from the Transaction Schedule screen. Using the Manage Affiliate Types button at the bottom of the Schedule screen, you can add Affiliate Types to the pull-down menu. Do this to create additional categories for storing affiliates by type.
- For example, if the task line description you have entered is “Loan Approval”, then select the Affiliate type “Lender” from the pull-down menu. This will link the contact information for the Lender chosen for this transaction to be associated with the “Loan Approval” task line. When this task line appears on the Consolidated Tasks screen, the Lender’s first and last name, company name, and work phone will appear in plain view. From the Consolidated Tasks and Transaction Schedule screens, when this

task line is double-clicked on (or the task line is selected and the **View Task** button is clicked), the “Task Information” window will pop up with the related affiliate’s contact information handy, and a control for entering and editing task-related notes.

The screenshot shows a window titled "Task Information" with a close button in the top right corner. The window is divided into several sections:

- Task Information:** Contains a "Description" field with the text "Termite Inspection". Below it are fields for "Role" (Termite Inspector), "Task Type" (Inspection), "Due" (12/28/2006), "Print Option" (Buyer), "Completed" (12/27/2006), and "Affiliate Type" (Insurance Rep).
- Affiliate Information:** Features a dropdown menu for "Affiliate" set to "Bruce Miller". Below this are sections for "Name" (Bruce Miller), "Salutation" (Mr. Miller), "Primary Address" (1900 Madison Ave, Ste 2-C, Riverside, CA 92501), "Mailing Address" (1900 Madison Ave, Ste 2-C), "Affiliate Info" (Role: Termite Inspector, Type: Termite, Company: Terminex), "Phone and Fax" (Home, Work, Home Fax, Work Fax, Cell, Other), and "Email" (bmiller@terminex.com). An "Edit Affiliate" button is located at the bottom of this section.
- Notes:** A table with columns "Date", "Subject", and "Note". A single note is listed with the date "12/17/2006", subject "inspection - termite", and note "buyer's choice of Terminex, Bruce Miller". To the left of the table are buttons for "New Note", "Edit Note", and "Delete Note".
- A "Done" button is located at the bottom right of the window.

Task Information Window

- **Role** – Roles work in a similar fashion as Affiliate Types (above) for relating particular affiliates in a transaction to each transaction schedule task line. Only by setting the role here, the user can be more specific. For example, set the task line to link to the Buyer Agent versus the Seller Agent, rather than “Agent”; or, the Buyer Agent Coordinator versus the Seller Agent Coordinator rather than “Coordinator”. The Roles used in EZ Coordinator are an established list of commonly used roles and cannot be edited or customized.
- **Task Type** - Each task line can be set with a user-defined Task Type. The pull-down menu in this column is seeded with commonly used Task Types for grouping tasks into types (i.e. contingencies, documents, inspections, general tasks, etc.). The Task Types column allows the user to sort all the tasks of a particular type together. Click on the Task Types column header in the schedule to sort the column. All the tasks of each type will be grouped together, allowing the user to inventory the tasks of each type and locate a particular task. Click on the Task Line Number column header to re-sort the schedule back into the original numeric order. Also, a “Task List” report can be output for a selected Task Type. Users can edit the values in the Task Type pull-down menu to add their own categories from the **Manage Task Types** button at the bottom of the Schedule screen.

- **Print Option** - Each Task Line can be set with a specific “Print Option” from this column’s pull-down menu. The choices for print options are Buyer, Seller, or Coordinator. Selecting one of these three choices allows a user to later choose a filtered print out of the calendar, task list, or status report for a selected transaction. For Example, for a task line with the description “Send the Buyer a Thank You Letter”, set the print option as “Coordinator”. When printing the Calendar, Task List, or Status Report for a buyer or client, and first filtering by the print option “Buyer”, the client will not see the task line set as “Coordinator” with the description “Send the Buyer a Thank You Letter”. From the Toolbar’s Calendar section, users can also filter the calendar of each transaction by print options for viewing purposes. Filter options include “All” (all items in the schedule), “Buyer”, “Seller”, or “Coordinator”. Additionally, users can output a version of the Task List and Status Report that shows all items.

### 3. Add a Task Line to a Schedule Template

- Select the schedule template from the list box of schedules (located on the left side of the screen) into which you want to add a new task line. The schedule will be loaded automatically.
- Click the **Add Task Line** button at the bottom of the screen. A new task line will be added to the schedule directly below the task line that you have currently highlighted.
- Make the appropriate setting changes to each task line column.
- Click the **Save Schedule** button to save the schedule.

### 4. Delete a Task Line from a Schedule Template

- Select the schedule template from the list box of schedules (on the left side of the screen). The schedule will be loaded automatically.
- Click on the task line that you want to delete from the schedule. The task line will become highlighted.
- NOTE: Hold in the “Shift” or “Ctrl” (Control) keys on your keyboard to select multiple task lines to delete at once.
- Click the **Delete Task Line** button at the bottom of the screen.

### 5. Customizing an Existing Schedule Template

- Select the schedule that you want to edit from the list box of schedules (located on the left side of the screen). The schedule will be loaded automatically.
- Make any changes as needed to the schedule template using the options and settings described above.
- Click the **Save Schedule** button.

### 6. Creating and Customizing a New Schedule Template

- Click the **New Schedule** button.
- Enter the name of the new schedule template in the field of the popup window that appears.
- Click the **Create** button.
- Click the Add Task Line button at the bottom of the Schedules screen to add new task line(s) to the schedule.
- Modify the new schedule’s task lines using the options and settings described above.
- Click the **Save Schedule** button.

### 7. Copying an Existing Schedule Template

- Duplicating a schedule template is completed using the **Copy** button. Use **Copy** to create an exact copy of an existing schedule template with all of its preset settings.

Once duplicated, the schedule can be given a new name and modified for a different purpose.

- Select the schedule that you want to copy from the list box of schedules. The schedule will be loaded automatically.
- Click the **Copy** button. All parts of the schedule will be copied into a new schedule except for the name.
- Type a new name for the schedule into the Schedule Name field at the top of the form and click the **Save Schedule** button.

## 8. Deleting a Schedule Template

- Select the schedule template that you want to delete from the list box of schedules. The schedule will be loaded automatically.
- Click the **Delete** button in the upper-left corner of the screen.
- You will be prompted to ensure that you want to delete the selected schedule. Click the **Yes** button to delete, or the **No** button to cancel.

## V. Receiving Additional Help with EZ Coordinator

An EZ Coordinator *User Guide* in Adobe Acrobat PDF format is available, located on the Trial and Full Version CD. The User Guide can also be downloaded from [www.ezcoordinator.com/downloads.html](http://www.ezcoordinator.com/downloads.html).

The program's documentation (User Guide, Quick Start Guide, etc.) and Tech Support information, plus an e-mail form for contacting Tech Support, can all be accessed directly from within EZ Coordinator by clicking the **Tools** button from the Toolbar and clicking the **Online Help** button.

The User Guide contains instructions found within the *Quick Start Guide*, plus:

- Installing EZ Coordinator on local or peer-to-peer networks
- License and User Administration
- Review of Program Controls and Navigational Features
- Managing Transactions and Scheduled Tasks
- Viewing and Printing Transaction Calendars
- Creating, Editing, or Generating Custom Forms (Letters)
- Stock Letter Library Descriptions
- Report Descriptions
- Backing Up and Restoring the Database
- Troubleshooting Tips
- And More!

Tech Support Hours are Monday through Friday (business days only) from 9:00 A.M. to 5:00 P.M. **For Technical Support call (951) 351-4939**, or e-mail [support@ezcoordinator.com](mailto:support@ezcoordinator.com). To place and order, inquire about pricing or licensing, or to receive a permanent "License Key" for unlimited use of EZ Coordinator, **contact sales at (951) 351-9500**.



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