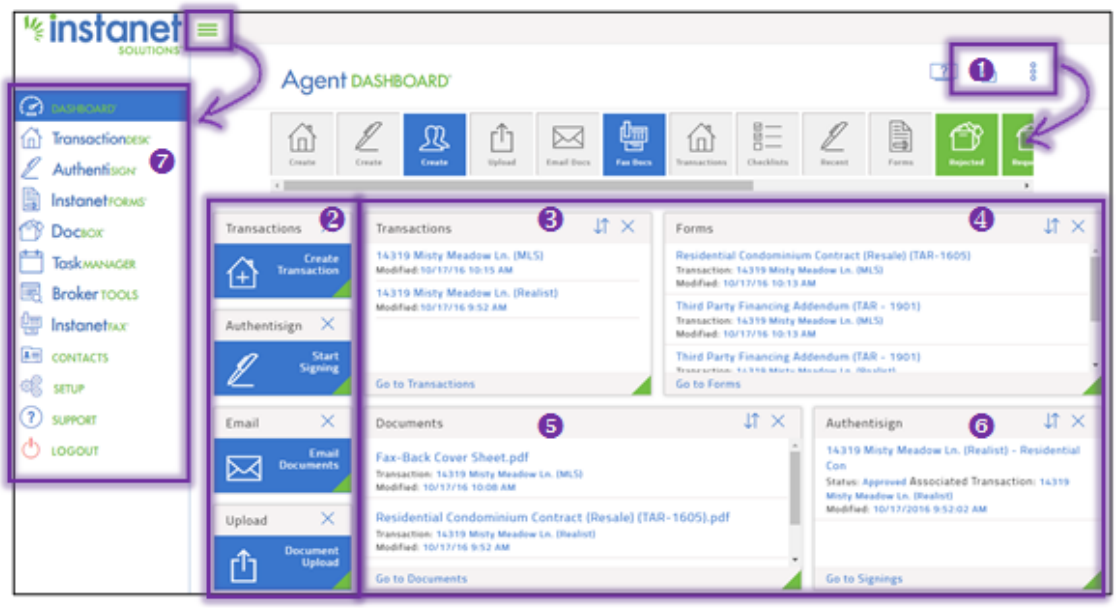
TransactionDesk Essentials

Houston Assocation of Realtors

3 Hours CE
Course#: 40112

1 Agent Dashboard

The customizable Agent Dashboard allows users to quickly create transactions, access previously created transactions, send items for electronic signatures and more.



☼ Customize the Dashboard with **Widgets**. Click the "stop light/snow man/bubbles" menu icon ( ) in the upper right corner to add/remove widgets using the **Widgets *Bar*** *(or click the X in the upper right of a widget to remove it)*.

❷ The **Widgets** provide a guided navigation to quickly create, store, and send online transactions. Simply click "**Create Transaction**" to begin and the wizard will walk you through the steps of selecting, auto-filling and completing forms, adding contacts, uploading additional documents and sending for paperless signing using Authentisign.

❸ Personalize the Dashboard with customizable **Widgets**. Quickly access any transaction that are in progress for editing, printing or sending with the **Transactions Widget.**

❹ Print or fill-in and save **Forms** to use individually or add to a transaction using the **Forms Widget**. Click "Go to Forms" to view all form libraries and to use the quick search to locate forms by keyword(s).

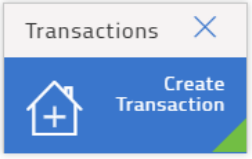
❺ Forms are editable things that you are filling in or changing. Once completed, they are referred to as **Documents**. Open, print or send completed document from this widget.

❻ Send forms and/or transactions for paperless signing using **AuthentiSign.**

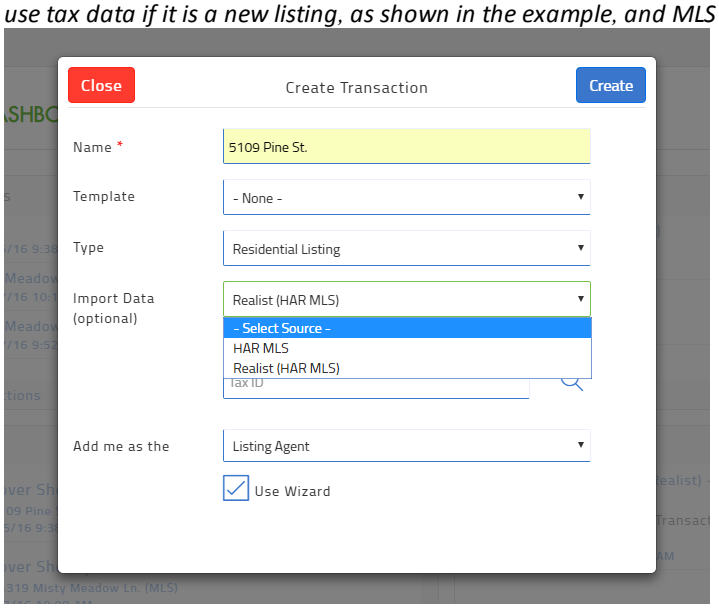
 Use the **Main Menu** to navigate to different modules of the program. Use the "hamburger" menu icon ( ) to switch from text view vs. icon view of the **Main Menu**.

2 Creating Transactions Using the Wizard and Importing Data

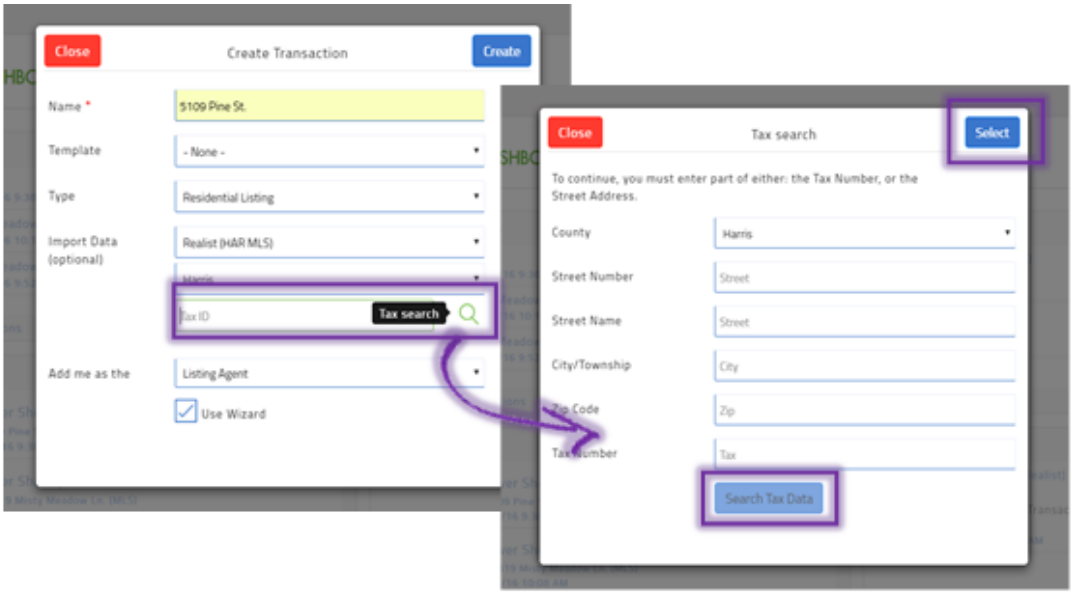
1. From the Agent Dashboard, click the Transactions Widget to get started.



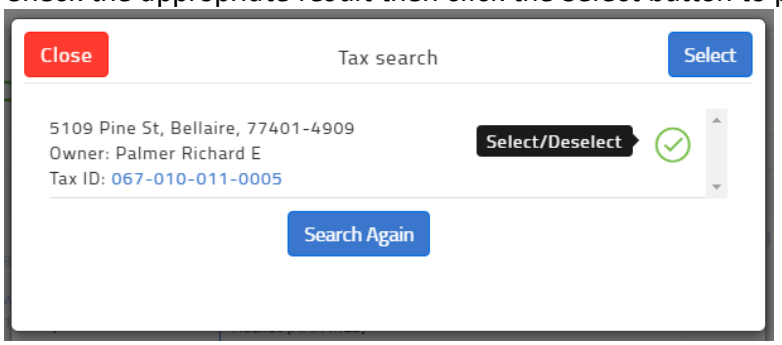
2. Fill in the blanks and click Create to use the Wizard to quickly and efficiently create your transaction. *(Note: MLS or Realist Tax data are options for import sources. Typically, one would use tax data if it is a new listing, as shown in the example, and MLS data if it is an offer.)*



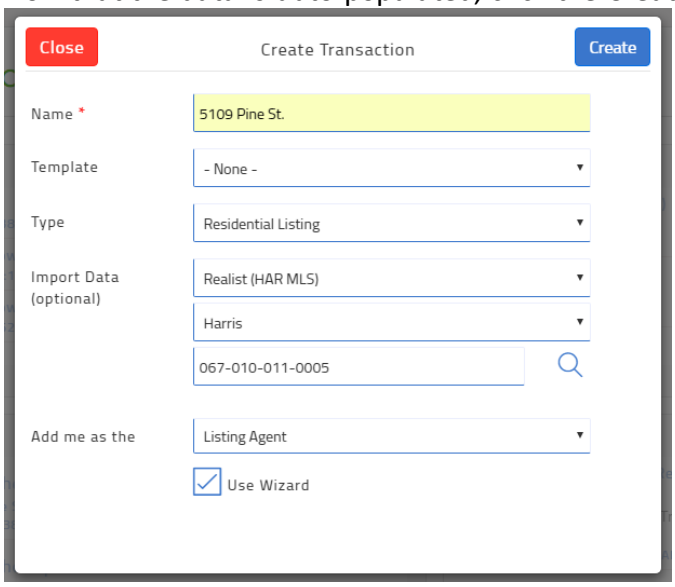
3. Click the search icon to search for the property by information other than Tax ID if necessary. Fill in the desired search fields and click the Search Tax Data button.



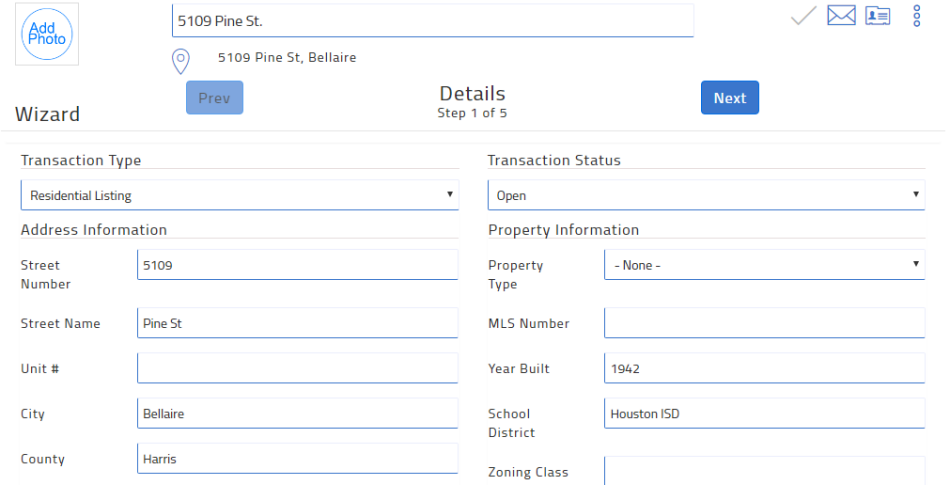
4. Check the appropriate result then click the Select button to proceed.



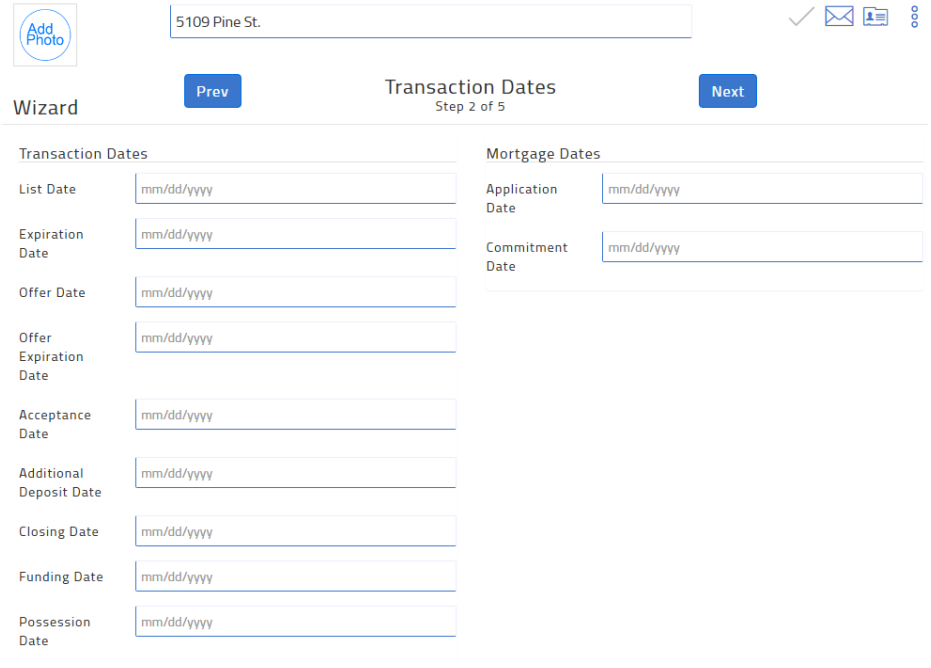
5. Now that the data is auto-populated, click the Create button to proceed.



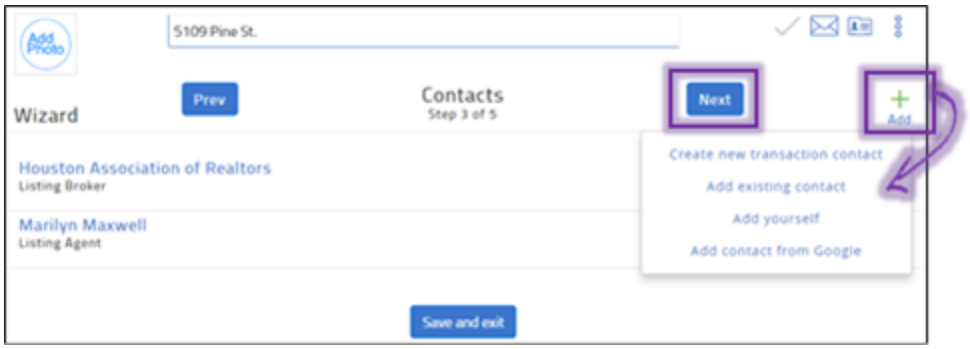
6. Use Step 1 of the Wizard to add property details. Click **Next** to go to step 2.



7. In Step 2, complete information specific/relevant to the transaction. Click **Next.**

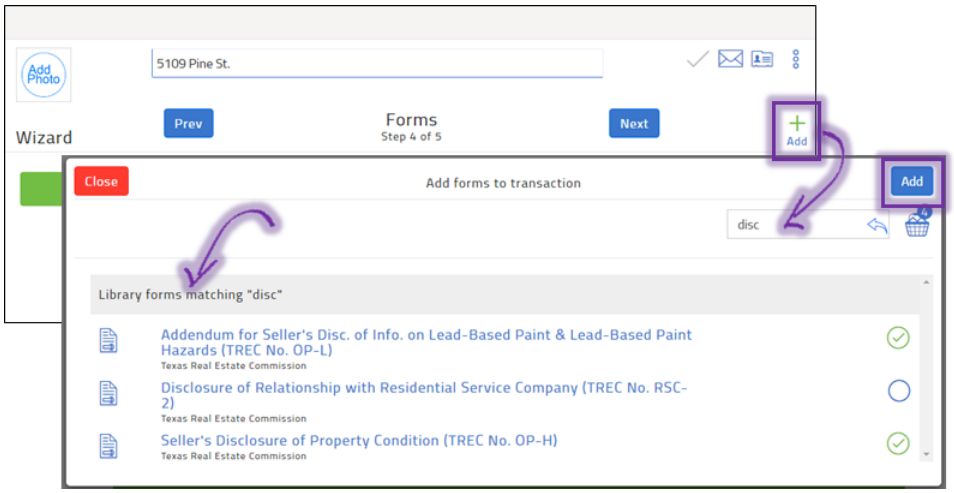


8. Use the Contacts feature to choose or add the parties of the transaction. Click Add to choose forms for the Transaction. Click Next.

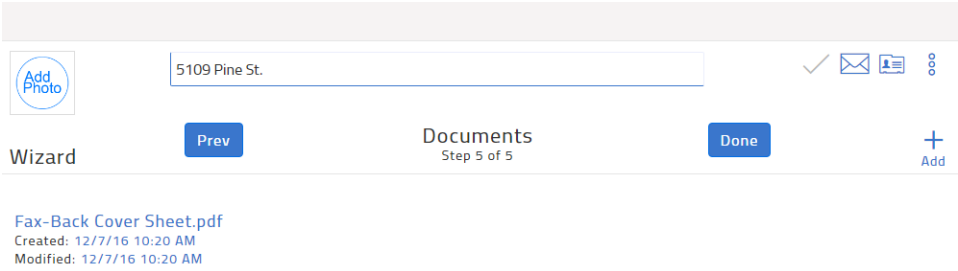


9. Use the Search box or click the form library folders to locate forms, click to select them and add them to the basket. Click Add once you've made your selection(s).

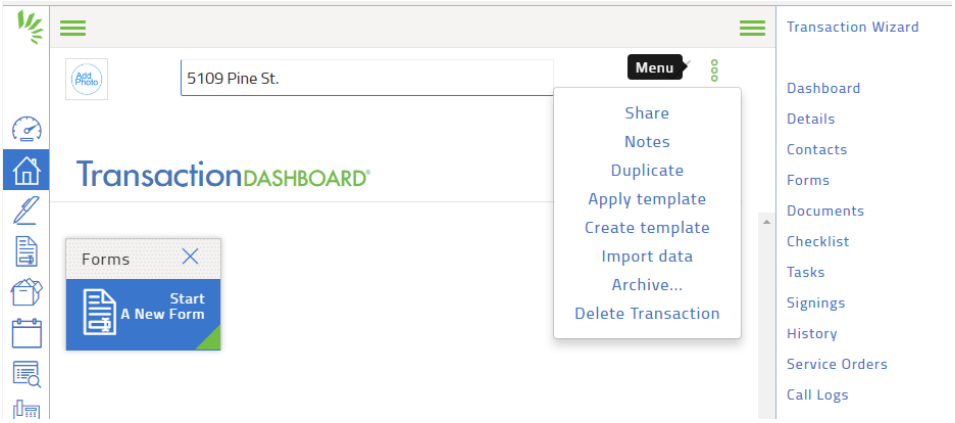
Click Next.



10. The final step of the Wizard creates a Fax Back Cover Sheet specific to this transaction. Anyone faxing forms, etc. would use this cover sheet as the first page of their fax, sending it to the number on the cover sheet. Digital copies of their faxed items will automatically be placed into the transaction that you previously created. Click Done.



11. Once the transaction is done, it appears on your Agent Dashboard. You can click the transaction title to add forms using the wizard on the left of the screen or further edit the details, add forms or documents, etc. using the controls or menu items on the right.

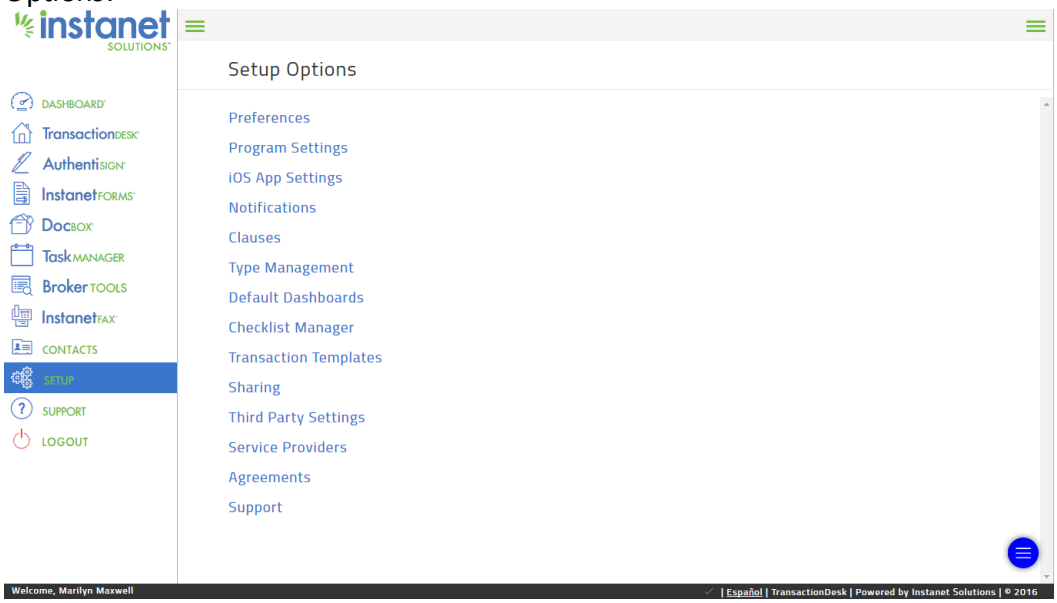


12. Use the main menu on the left of the screen to navigate back to the Agent Dashboard or other modules of the program. Click on the “hamburger” menu to switch between icon and text label views.

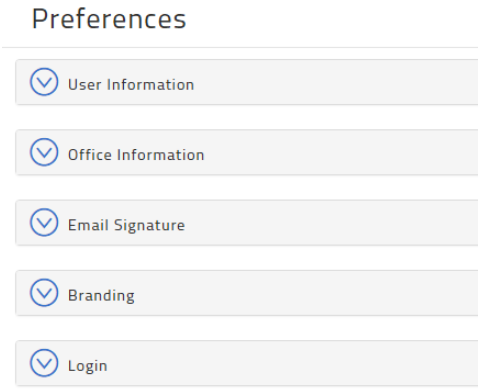
3 Preferences

In the Setup section you can manage your Preferences such as your contact information, office information, email signature, branding and login info. (change password).

1. Click on Setup in the main menu and then choose Preferences from the Setup Options.

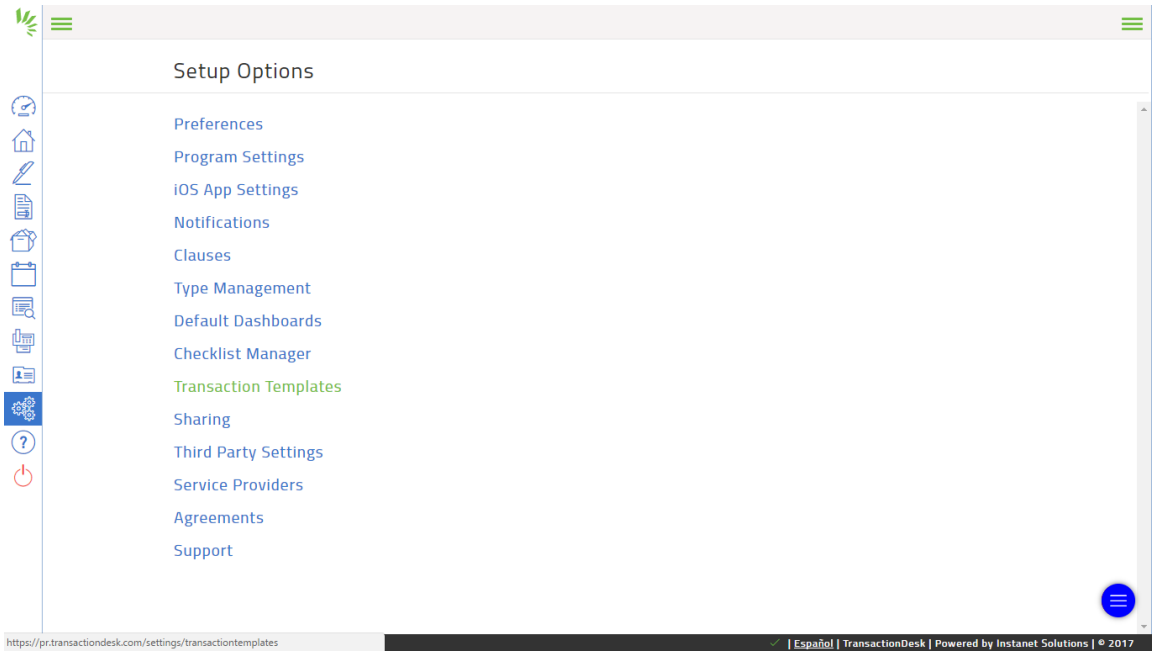


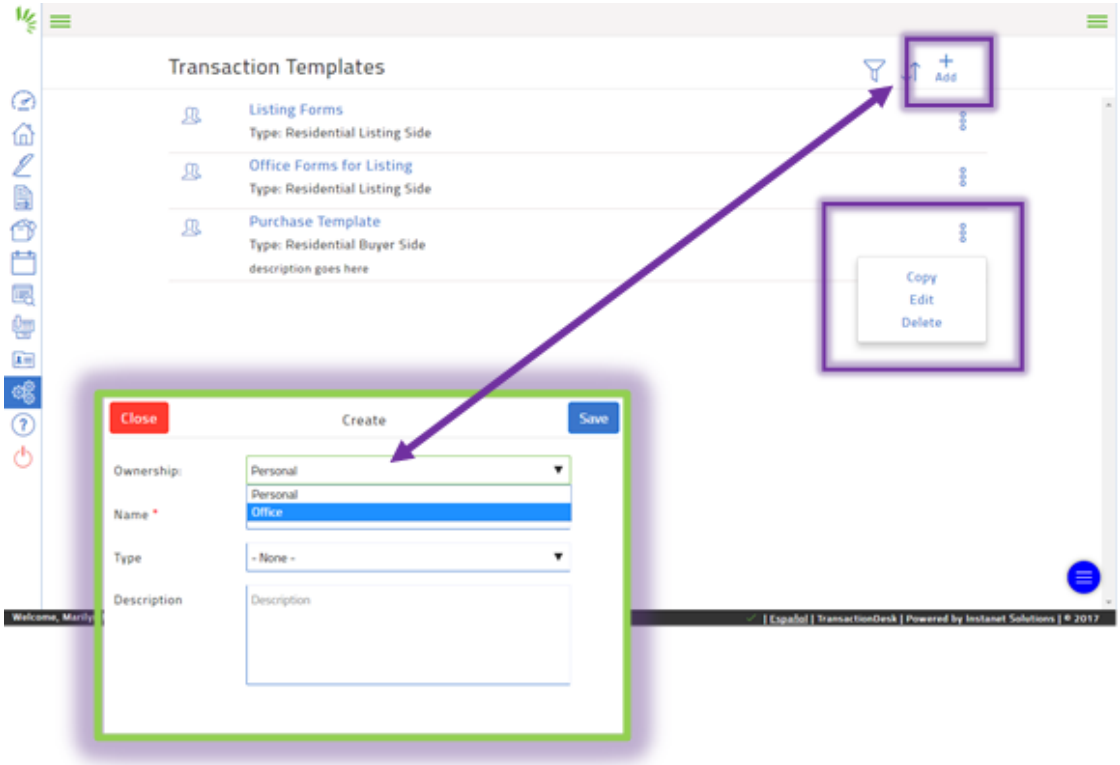
2. Click to expand the section of the Preferences that you wish to manage.



a. User Information: name, time zone, phone number, email, website
b. Office Information: view the office name, address, phone and fax
c. Email Signature: included on any email correspondence sent from within TransactionDesk
d. Branding: upload images for Fax-Back Cover Sheet & email banner, personal photo and company logo
e. Login: reset the password for your TransactionDesk account

In the Setup Options Brokers can create unlimited Transaction Templates for their office and can choose to “force” templates to the agent accounts so that each transaction created will comply to the forms and processes within the template(s). Agents can also have the ability to create their own Transaction Templates *(always defer to Broker office policy for using templates)*.



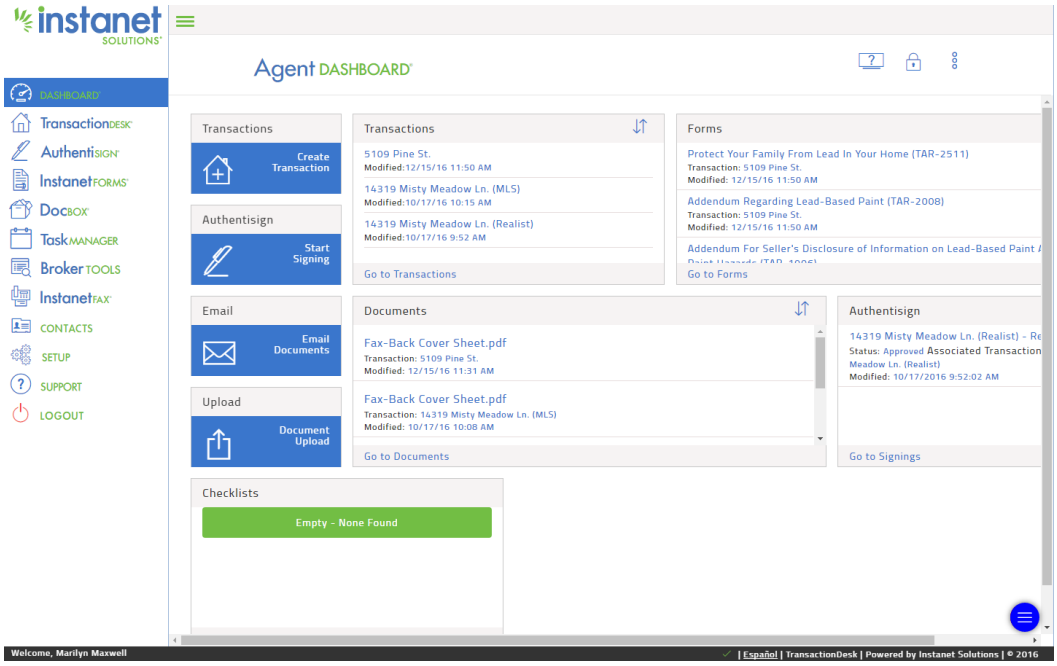


4 AuthentiSign (electronic signature or paperless signing system)

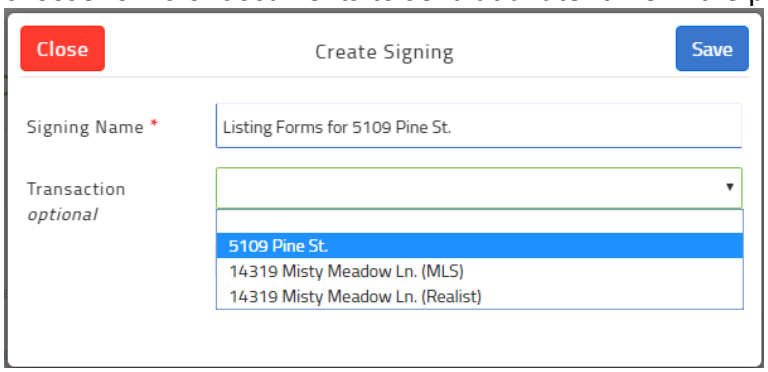
Create and sign documents legally and securely on any device, no matter where you are. Complete with tamper proof security technology to prevent document modification, Authentisign® is 100% ESIGN compliant and FHA and Fannie Mae approved. And, to make things even easier, the software integrates seamlessly with the popular cloud services Dropbox®, Google drive and OneDrive.

There are several way to access the AuthentiSign functionality within TransactionDesk, one of which is to use the Widget on the Agent Dashboard.

1. From the Agent Dashboard, click the AuthetiSign widget to launch the signing wizard.

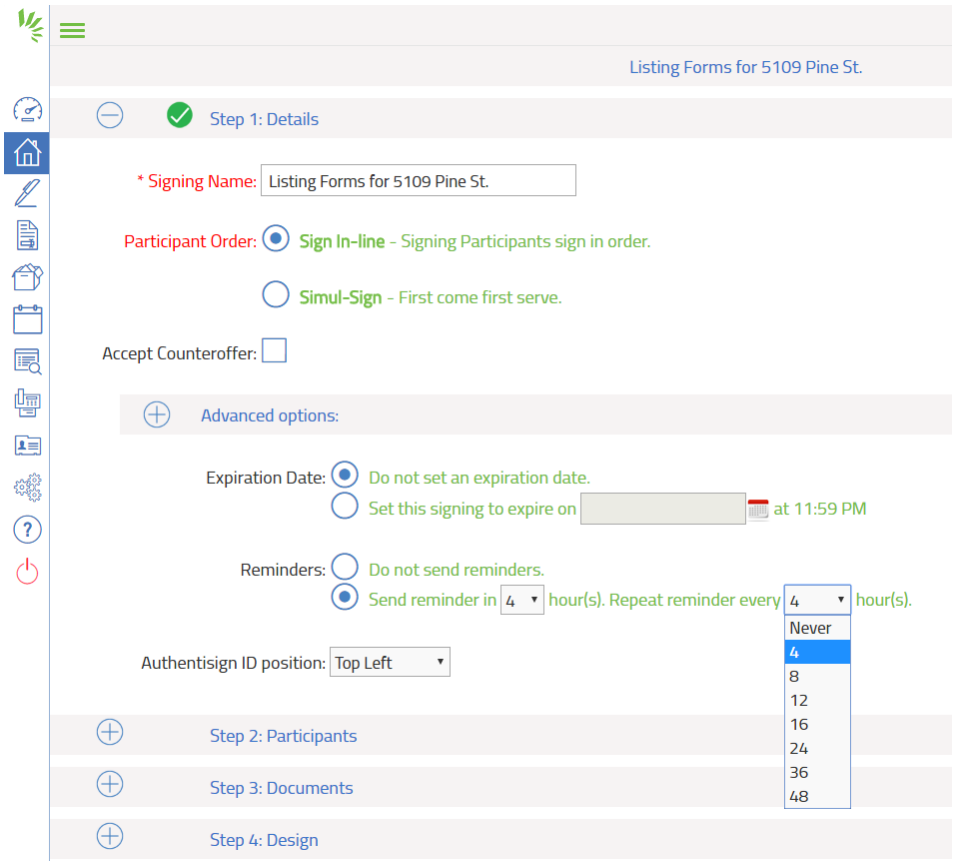


2. Once the wizard launches, you can use any "Signing Name" naming convention that will make sense to the client receiving the items and that will also easily help you find it within the TransactionDesk system later. "*Signing Name" examples: client name, property address, the type of forms being sent (listing, offer, etc.) or the specific form names (listing agreement, Seller's Disclosure, etc.).*
   Selecting a transaction to include in the AuthetiSign is optional, but the most likely method you will use. If you do not link it to a transaction in this step, you can choose forms or documents to send at a later time in the process.

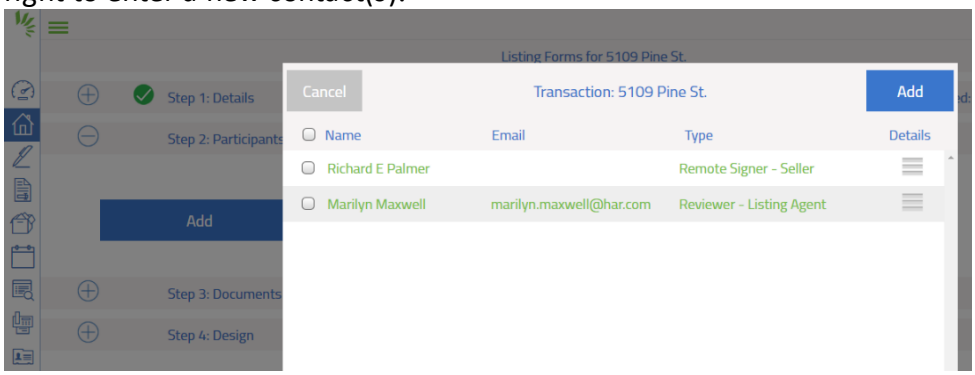


3. In Step 1, the "Participant Order" options allow you to send items to clients for e-signature simultaneously (using Simul-Sign) or in a specific order one at a time (using Sign In-Line). If you choose to do so, you can utilize the Advanced Options as

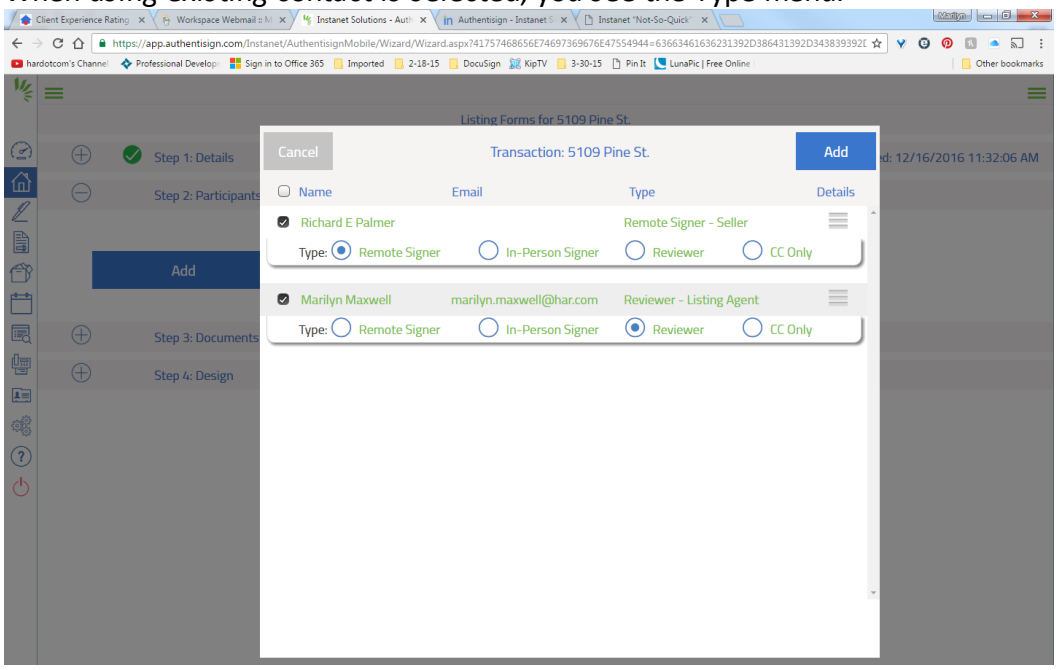
well.



4. In Step 2, check the box to the left of a contact to choose Participants (those who will be e-signing) from your address book or by clicking the Add button in the upper right to enter a new contact(s).

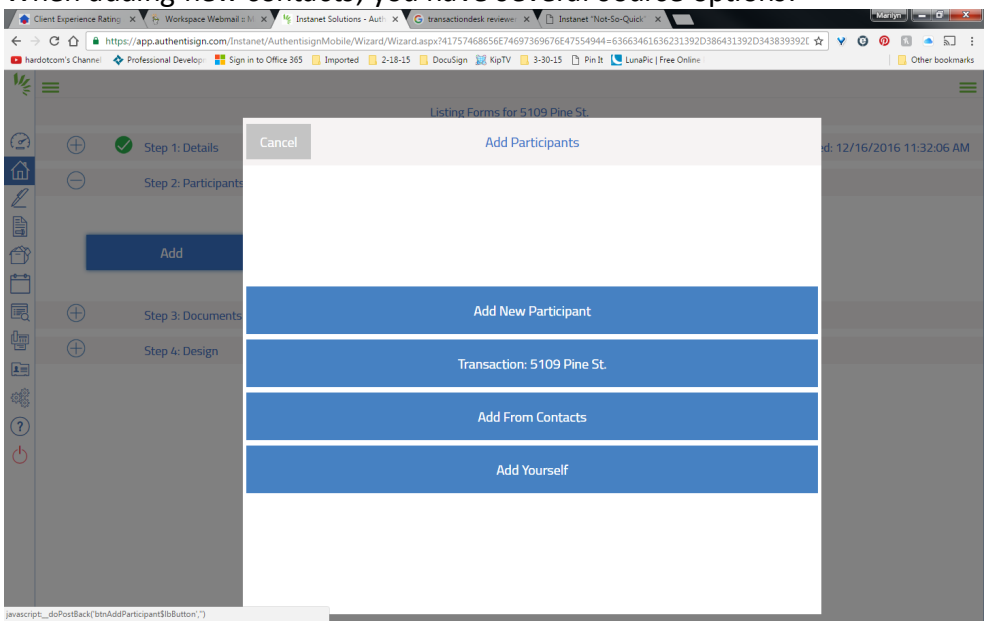


5. When using existing contact is selected, you see the Type menu.



a. Remote Signer: not physically present; receiving and signing online
b. In-Person Signer: physically present and signing on a tablet, etc. while with you and/or someone who does not have an email address.
c. Reviewer: not a party to the transaction/not signing (Broker, title rep, etc.). They can review items to be sure they're OK or reject them if not.
d. CC Only: not a party to the transaction/not signing. Receives copy of signed items after all parties have signed.

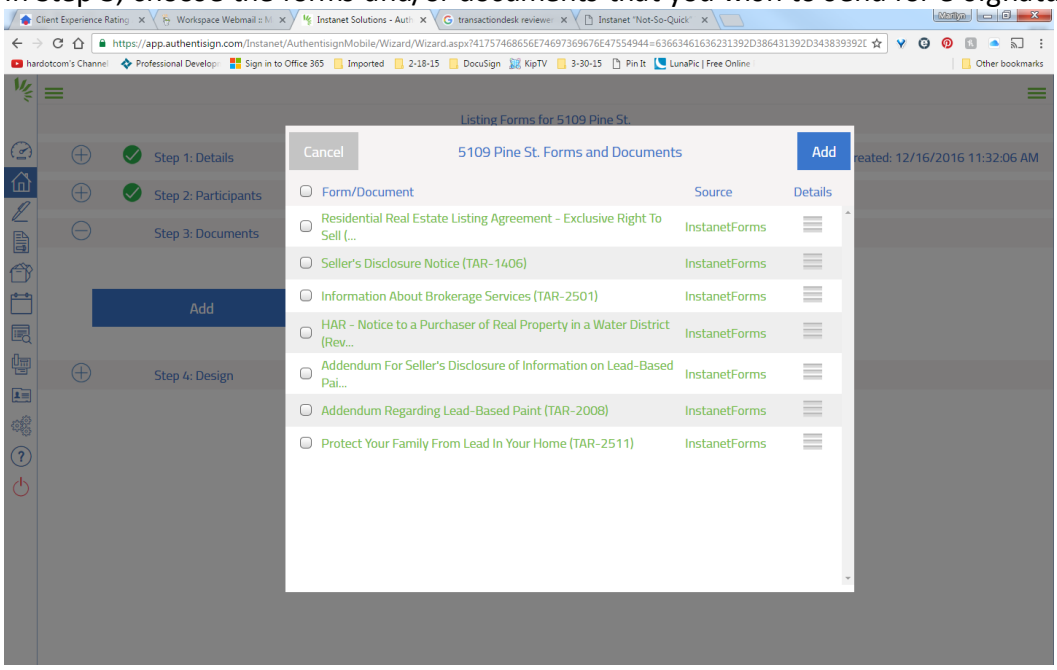
6. When adding new contacts, you have several source options.



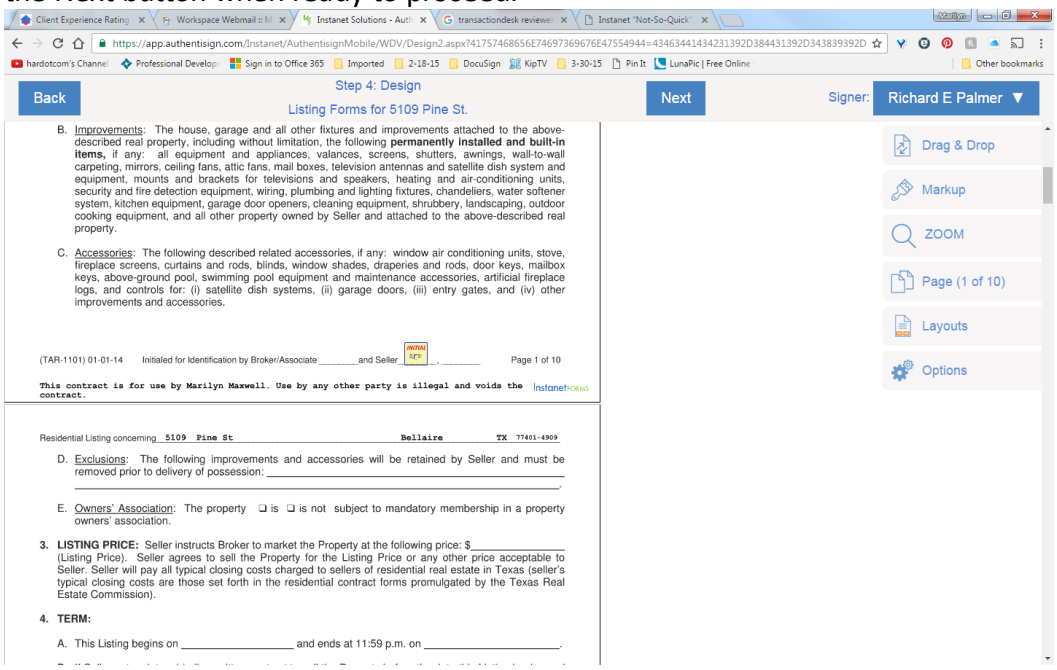
a. Add New Participant: add contact from 'scratch' by manually entering info.
b. Transaction: pull info. (name, email, etc.) from completed transaction forms

c. Add from Contacts: another means of adding from existing contacts
d. Add Yourself: add yourself using the info. in your TransactionDesk profile

7. In Step 3, choose the forms and/or documents that you wish to send for e-signature.

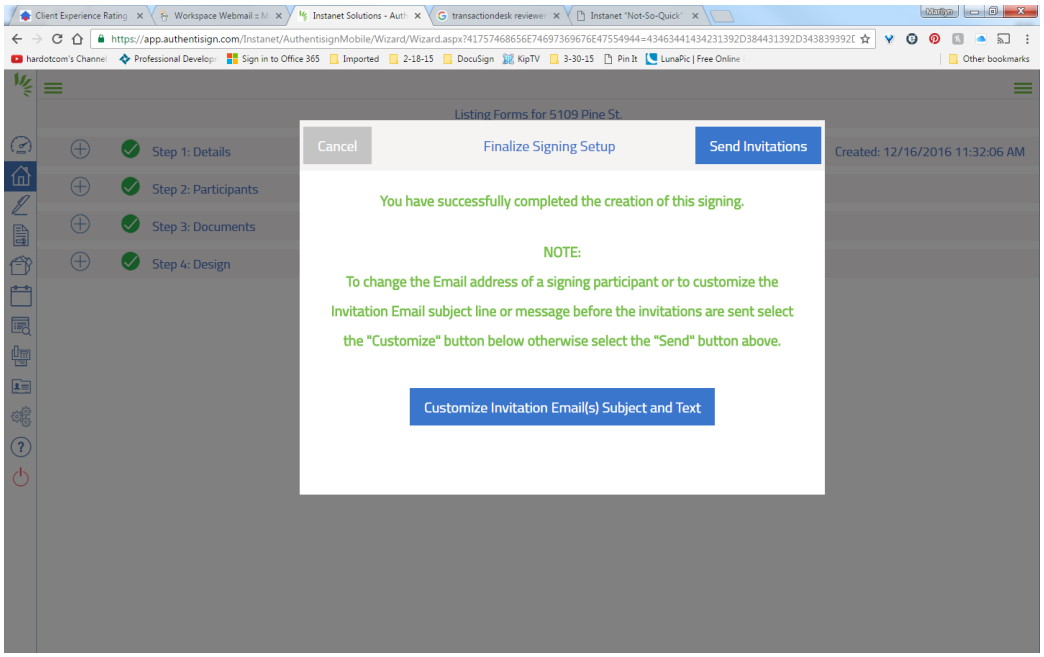


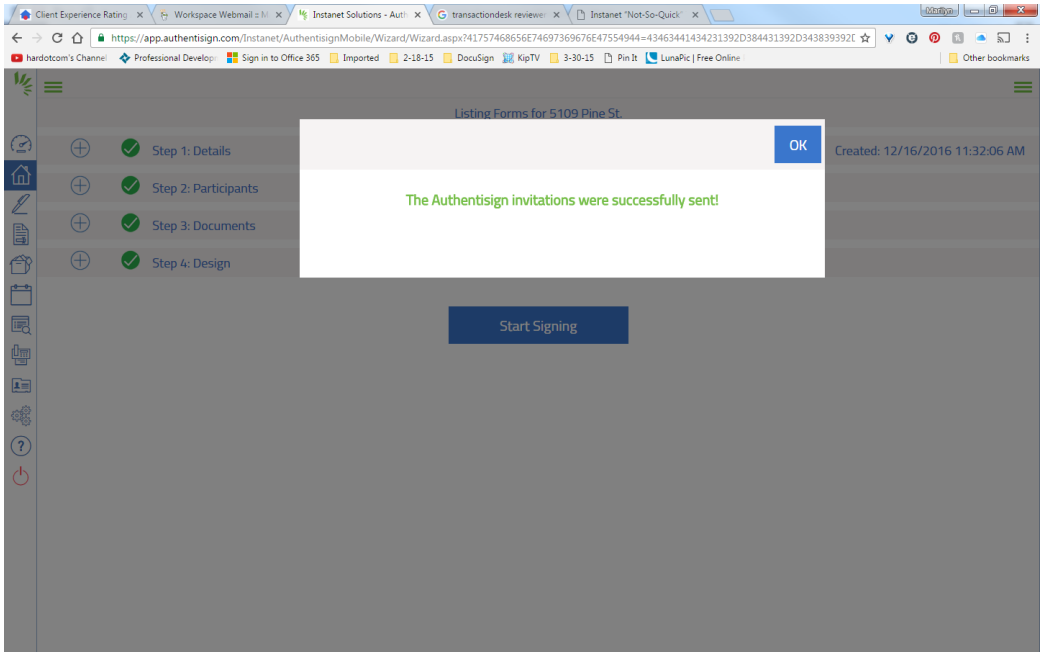
8. The Design step or Step 4 pertains to 'who signs where'. Although TransactionDesk 'knows' where to place the initial and signature fields automatically, you can also edit them, highlight or "markup" the verbiage, etc. using the tools on the right. Click the Next button when ready to proceed.



9. Finalize Signing Setup by customizing the email subject and text if you choose, then click Send Invitations.

AuthentiSign (electronic signature or paperless signing system)

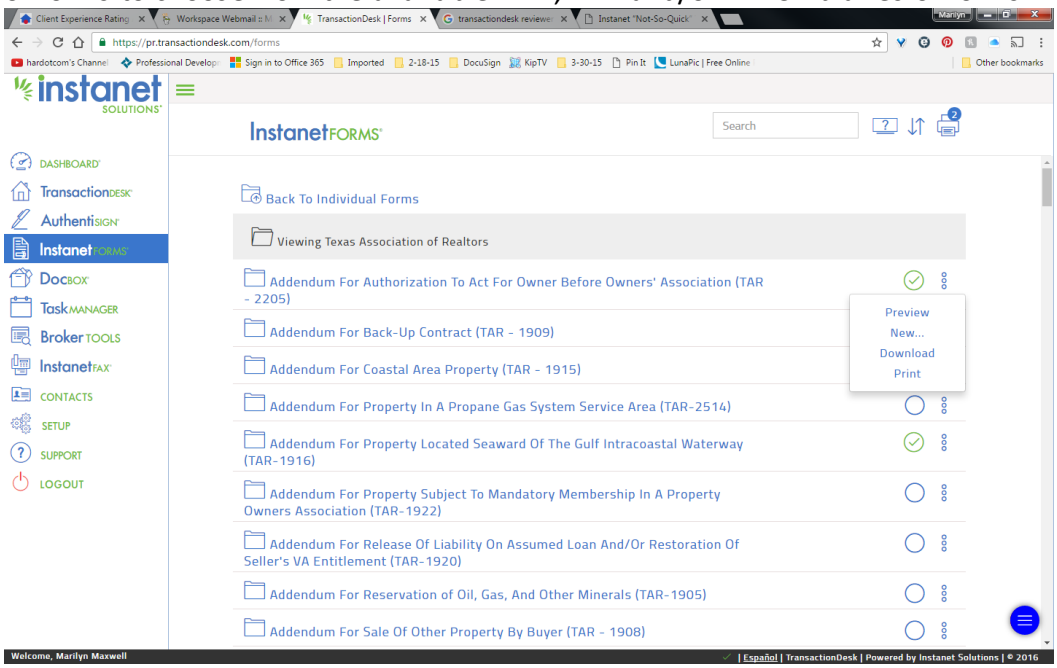




5 InstanetForms

Create and distribute forms without utilizing the widget, AuthetiSign, etc.

1. From the main menu on the left, choose InstanetForms. Click to expand the folder(s) of forms to choose from the available HAR, TAR and/or TREC libraries of forms.



   a. Click the circle to the right of each form to select it. Click the 'stoplight' menu to see other options. As you select multiple forms, the printer icon will show the grand total number of selected forms.

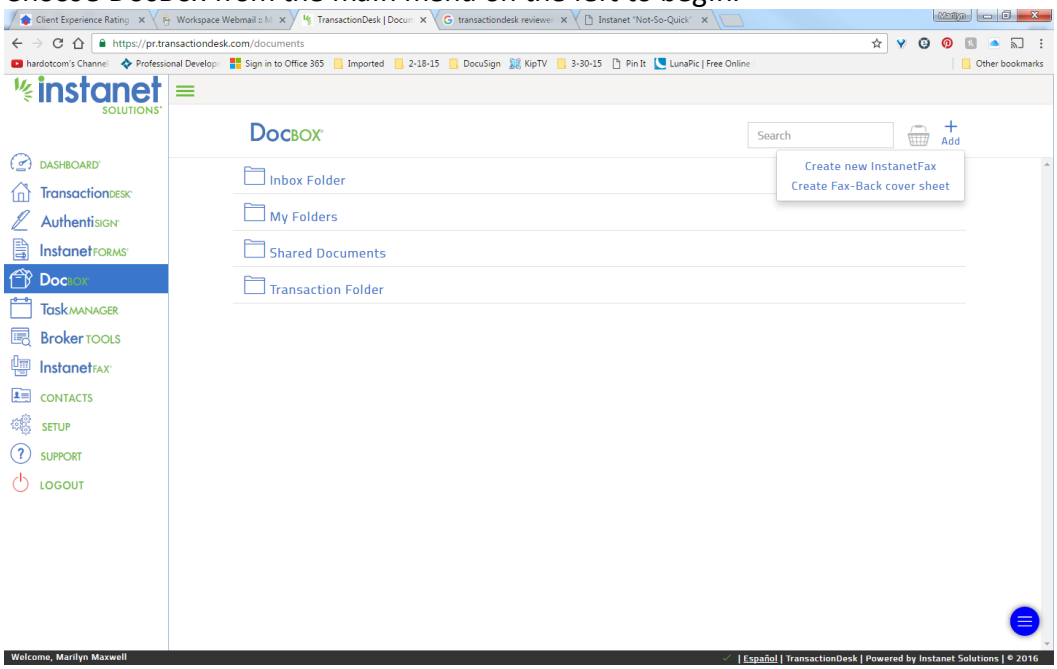
   b. Use the search box at the top to search by keyword(s) or number.

2. Click the printer icon to choose to print paper copies of forms or convert to PDF.

6 DocBox

Create and store folders for managing and storing items.

1. Choose DocBox from the main menu on the left to begin.



a. Inbox Folder: items that are sent via email

b. My Folders: custom folders you create - store anything (pictures, documents, etc. Does not have to be related to a transactions/business at all).

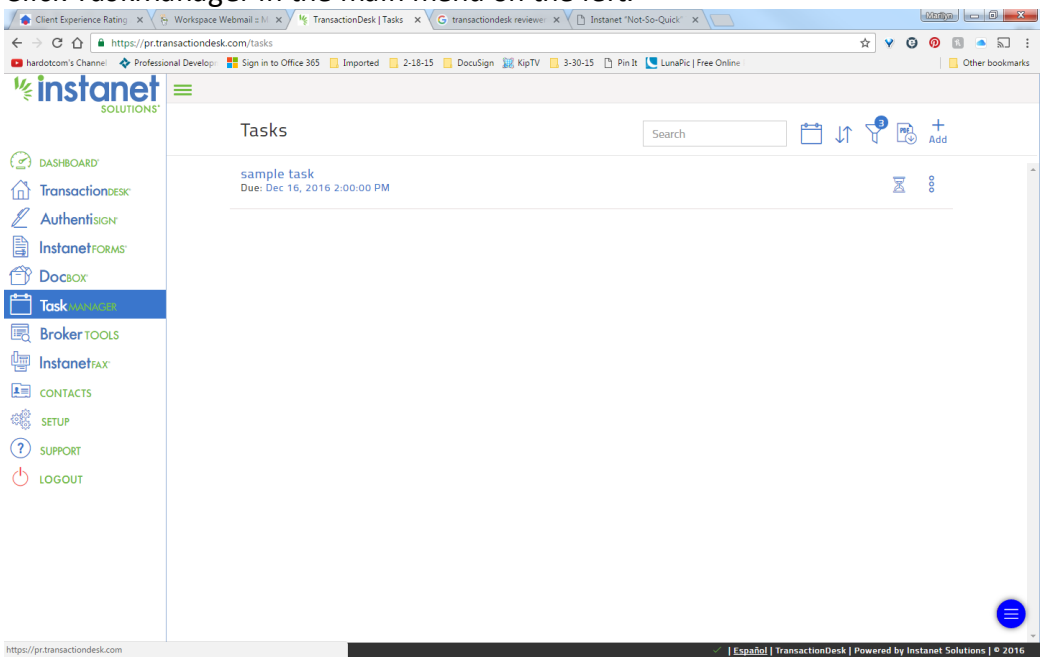
c. Shared Documents: documents or transactions shared with customers, etc.

d. Transaction Folder: specific transaction related items that have been submitted using the Fax Back Cover Sheet or email

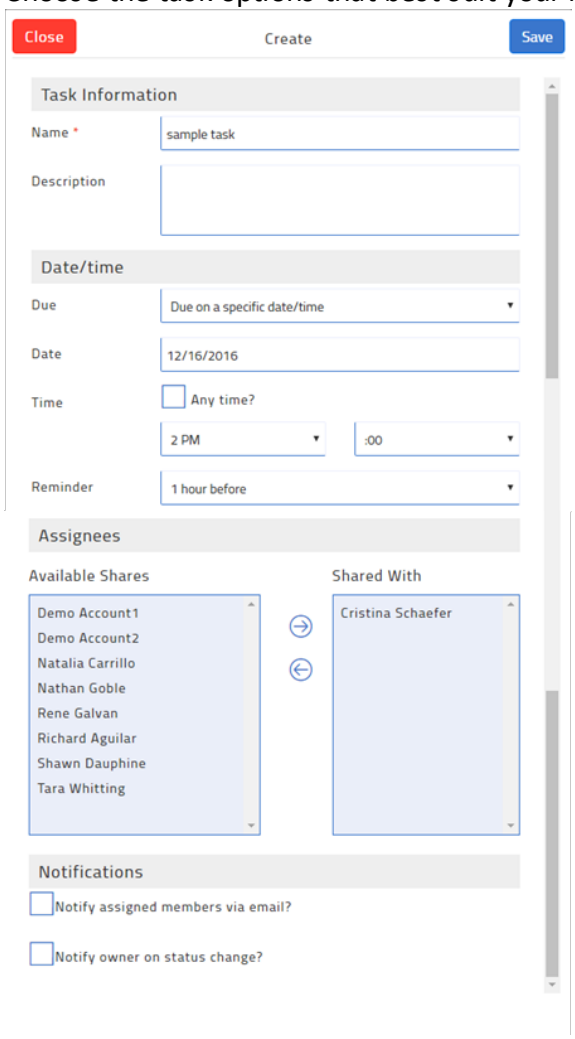
7 TaskManager

Create a “to-do list” of things to be done in general or by specific dates and/or times.

1. Click TaskManager in the main menu on the left.



2. Choose the task options that best suit your needs.



8 InstaFax

Send and have customers send items via traditional paper fax and they will automatically be converted electronic files that will be placed inside the previously created transaction folder for you.

1. Click the InstaFax menu on the main menu on the left. Fill in the fields to create a Fax Back cover sheet for those who may need to send you items by fax. As previously illustrated, when you utilize the widget to create a transaction, it automatically creates the Fax Back cover sheet as the last step of that process.