



TransactionDesk Essentials

Houston Association of Realtors

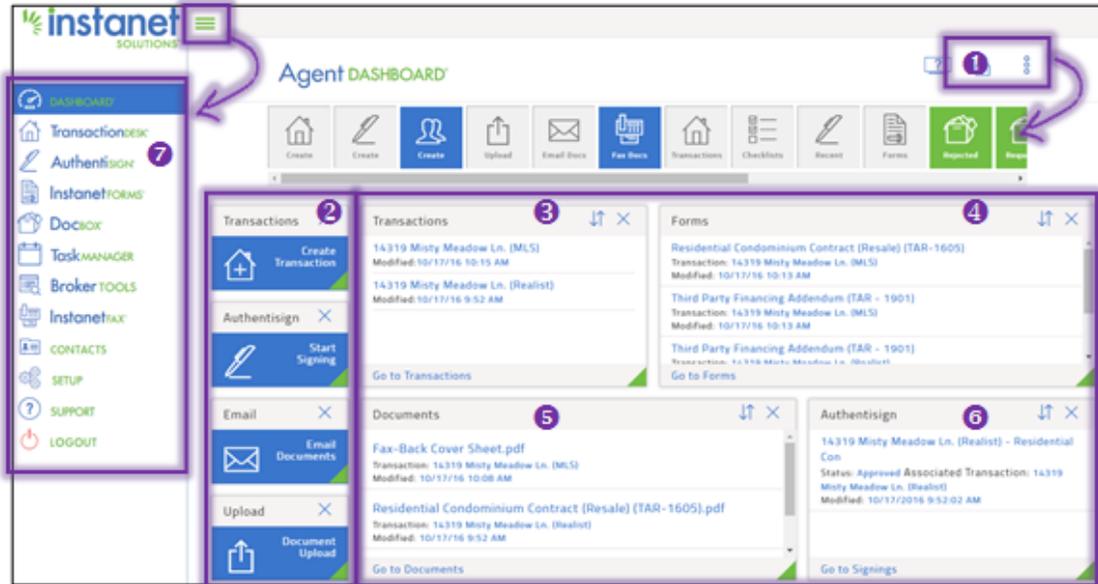


3 Hours CE
Course#: 40112

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1 Agent Dashboard

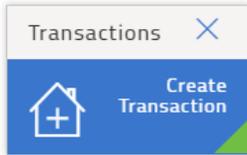
The customizable Agent Dashboard allows users to quickly create transactions, access previously created transactions, send items for electronic signatures and more.



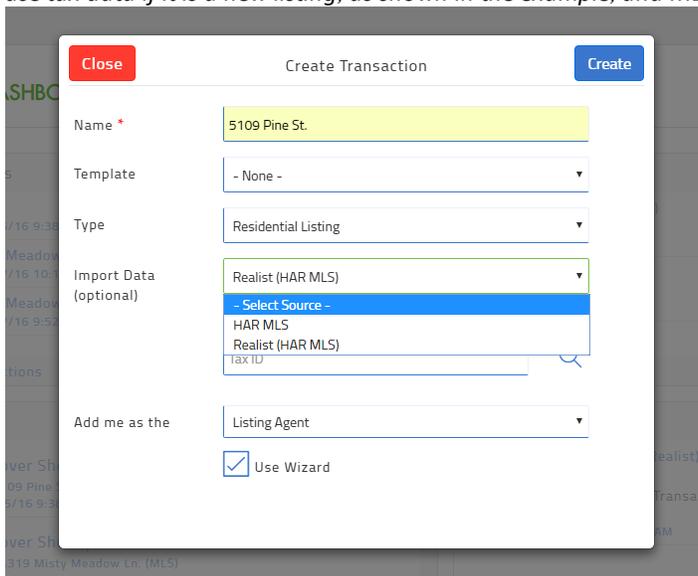
- ⚙️ Customize the Dashboard with **Widgets**. Click the “stop light/snow man/bubbles” menu icon (☰) in the upper right corner to add/remove widgets using the **Widgets Bar** (or click the X in the upper right of a widget to remove it).
- ➊ The **Widgets** provide a guided navigation to quickly create, 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.
- ➋ Personalize the Dashboard with customizable **Widgets**. Quickly access any transaction that are in progress for editing, printing or sending with the **Transactions Widget**.
- ➌ 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).
- ➍ 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.
- ➎ 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

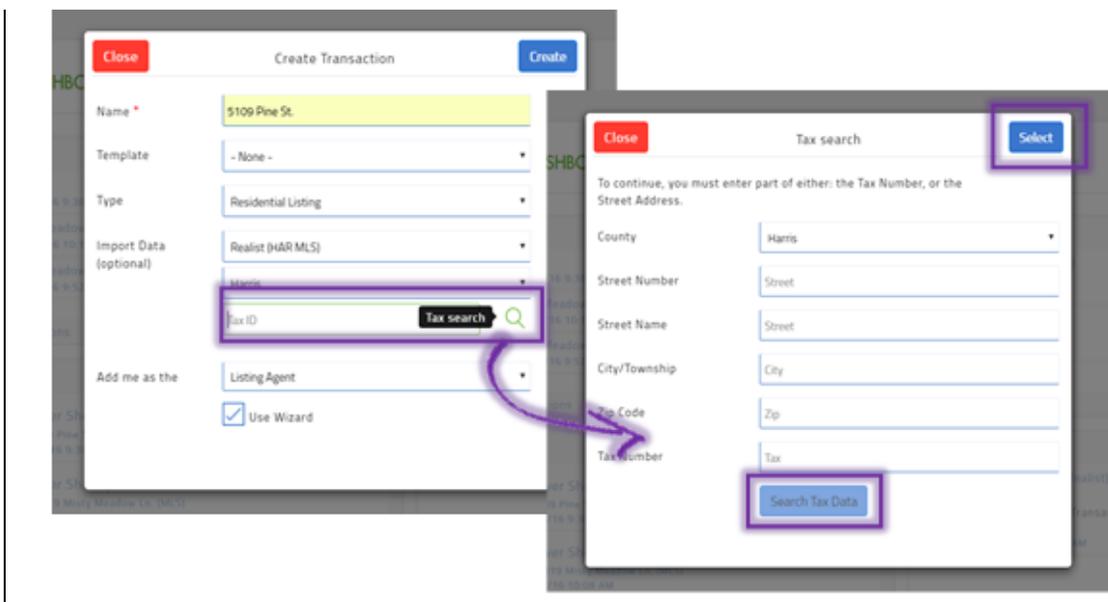
1. From the Agent Dashboard, click the Transactions Widget to get started.



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.

Close Tax search **Select**

5109 Pine St, Bellaire, 77401-4909
 Owner: Palmer Richard E
 Tax ID: 067-010-011-0005

Select/Deselect

Search Again

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

Close Create Transaction **Create**

Name * 5109 Pine St.

Template - None -

Type Residential Listing

Import Data (optional) Realist (HAR MLS)
 Harris

067-010-011-0005

Add me as the Listing Agent

Use Wizard

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

Add Photo 5109 Pine St.

5109 Pine St, Bellaire

Prev **Details** **Next**
 Step 1 of 5

Wizard

Transaction Type		Transaction Status	
Residential Listing		Open	
Address Information			
Property Information			
Street Number	5109	Property Type	- None -
Street Name	Pine St	MLS Number	
Unit #		Year Built	1942
City	Bellaire	School District	Houston ISD
County	Harris	Zoning Class	

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

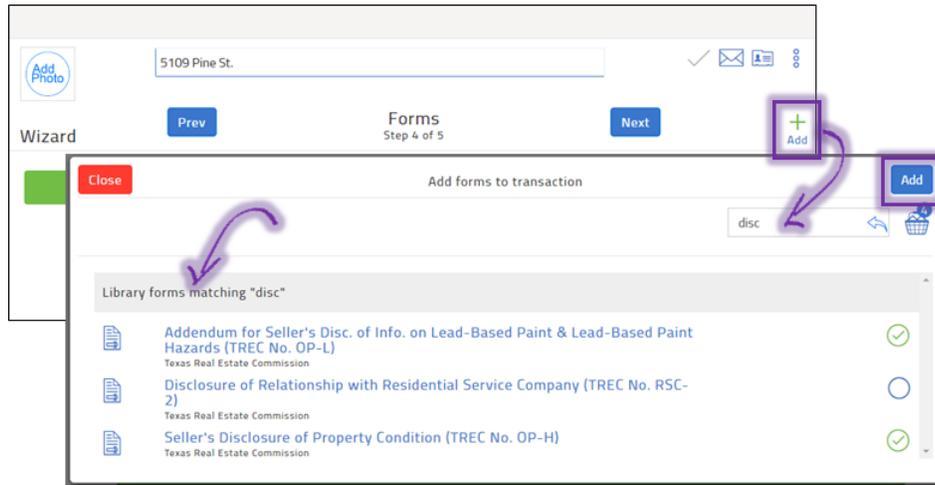
The screenshot shows the 'Transaction Dates' step (Step 2 of 5) in a wizard. At the top, there is an 'Add Photo' button, a text input field containing '5109 Pine St.', and utility icons for checkmark, email, print, and refresh. Below this are 'Prev' and 'Next' buttons. The main area is divided into two columns: 'Transaction Dates' and 'Mortgage Dates'. Each column contains several date input fields with a 'mm/dd/yyyy' placeholder. The 'Transaction Dates' column includes: List Date, Expiration Date, Offer Date, Offer Expiration Date, Acceptance Date, Additional Deposit Date, Closing Date, Funding Date, and Possession Date. The 'Mortgage Dates' column includes: Application Date and Commitment Date.

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

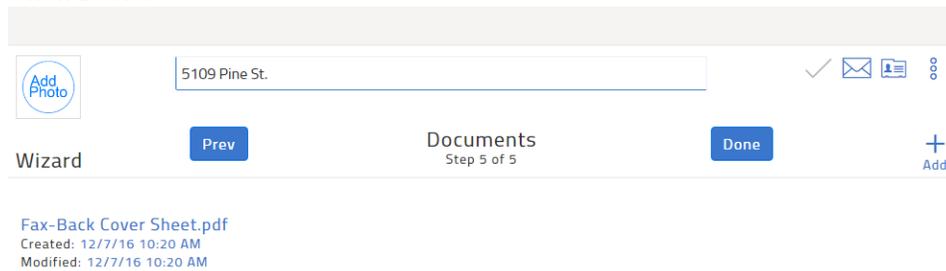
The screenshot shows the 'Contacts' step (Step 3 of 5) in a wizard. At the top, there is an 'Add Photo' button, a text input field containing '5109 Pine St.', and utility icons for checkmark, email, print, and refresh. Below this are 'Prev' and 'Next' buttons. The main area lists contacts: 'Houston Association of Realtors' (Listing Broker) and 'Marilyn Maxwell' (Listing Agent). An 'Add' button (a green plus sign) is highlighted with a purple box, and a purple arrow points to a dropdown menu that is open. The menu options are: 'Create new transaction contact', 'Add existing contact', 'Add yourself', and 'Add contact from Google'. A 'Save and exit' button is at the bottom.

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).

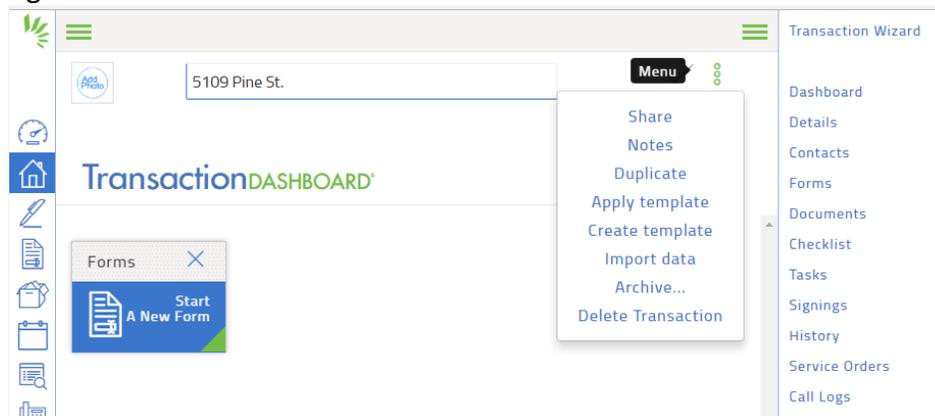
Click Next.



- 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.



- 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.



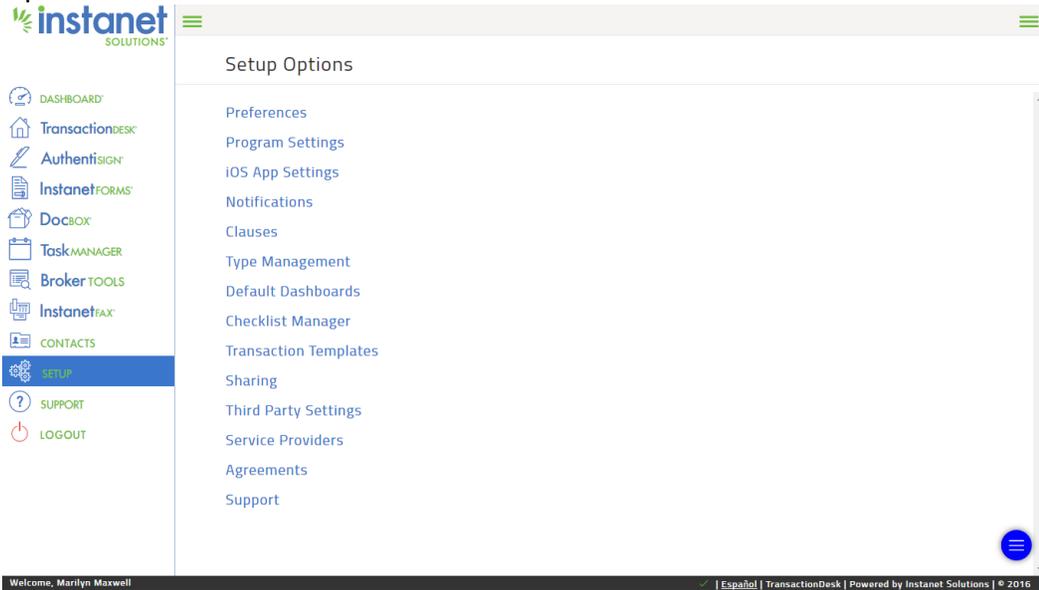
12. Use the main menu on the left of the screen to navigate back to the Agent Dashboard or other modules of the program. Click on the “hamburger” menu to switch between icon and text label views.



3 Preferences

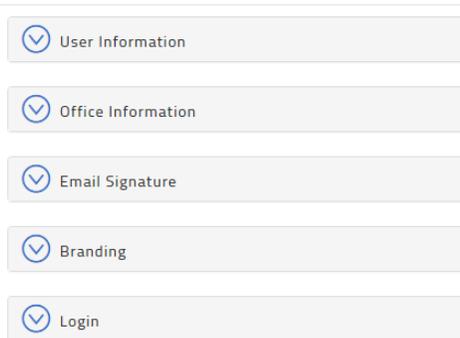
In the Setup section you can manage your Preferences such as your contact information, office information, email signature, branding and login info. (change password).

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



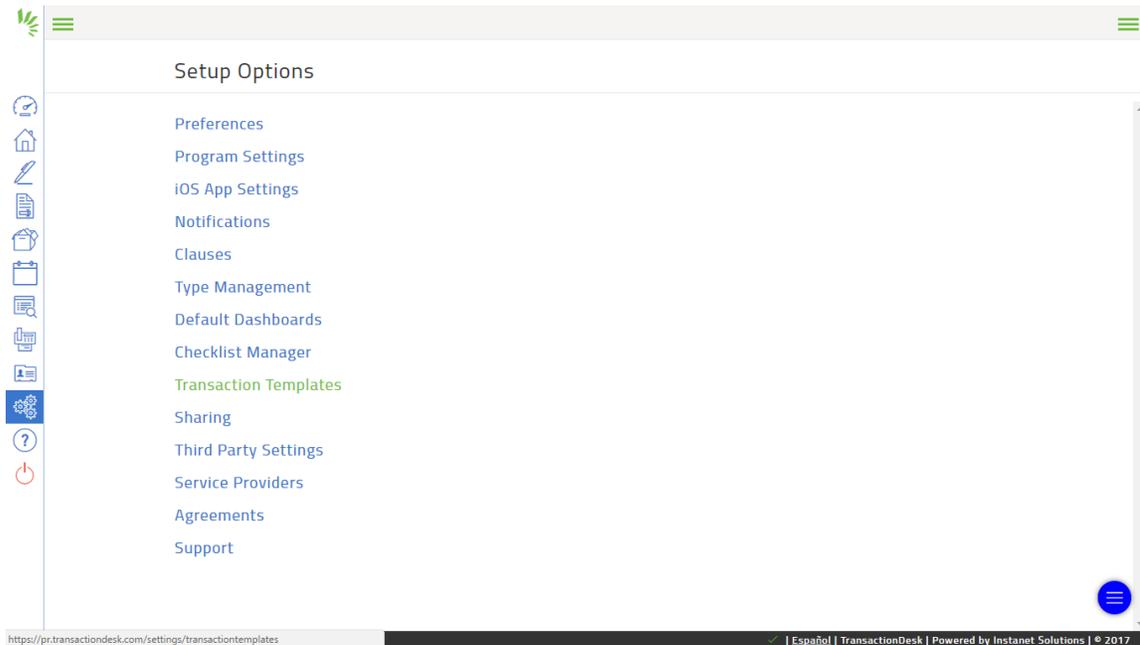
2. Click to expand the section of the Preferences that you wish to manage.

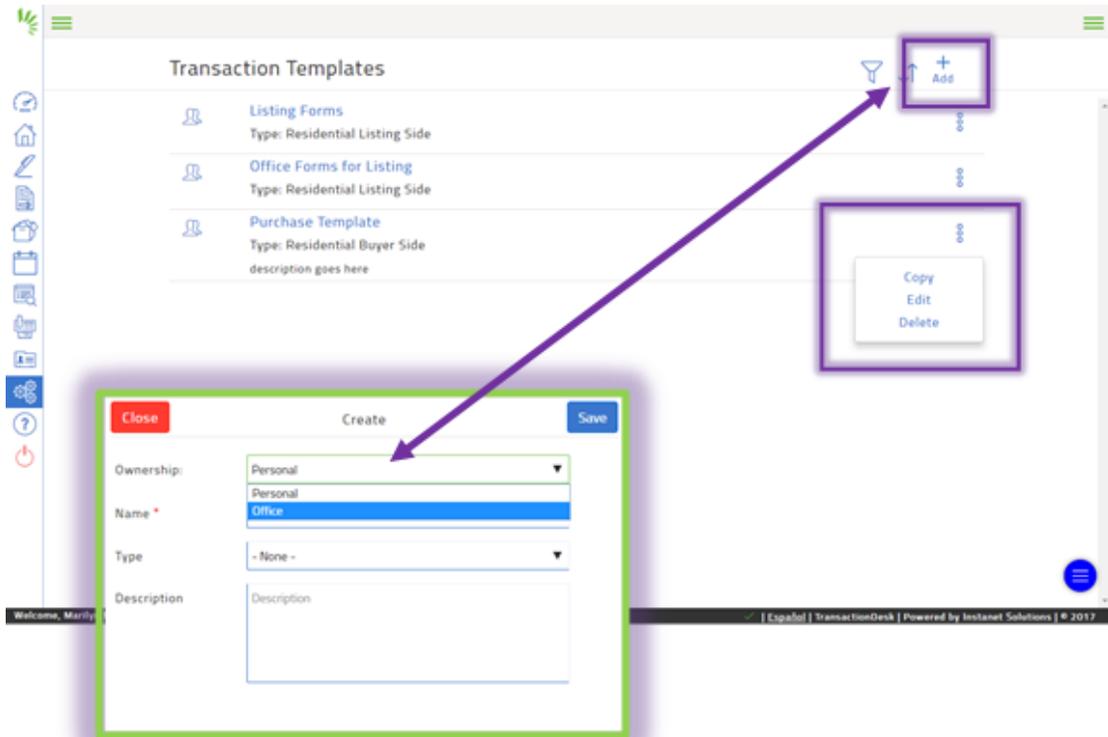
Preferences



- 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*).





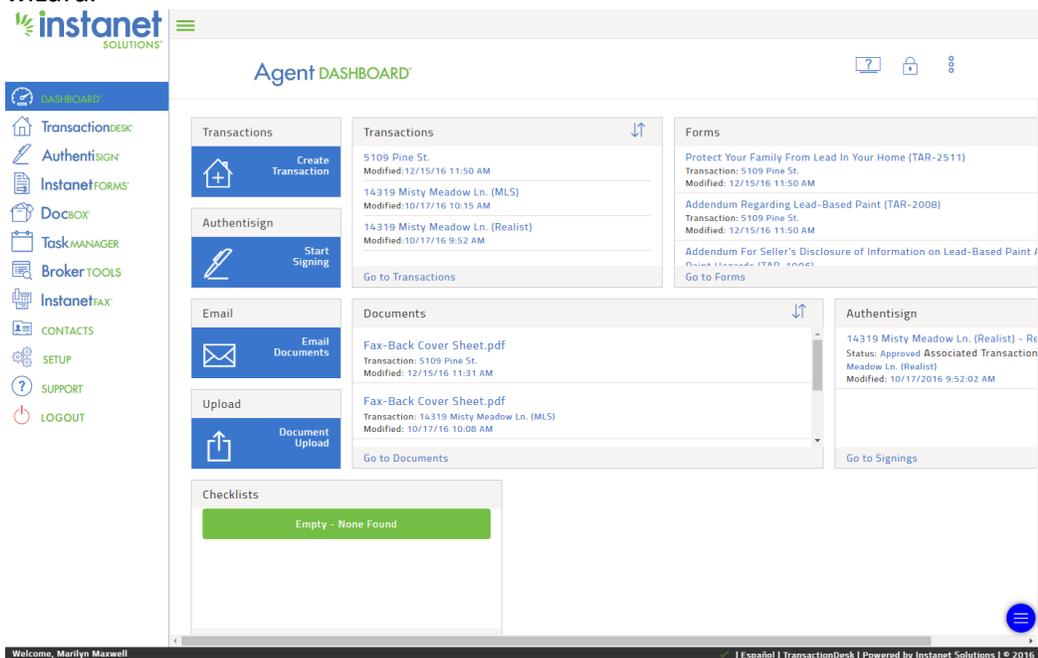
4 AuthentiSign (electronic signature or paperless signing system)

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% E-SIGN 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.

AuthentiSign (electronic signature or paperless signing system)

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.

The screenshot shows the 'Create Signing' wizard form. It has a 'Close' button on the top left and a 'Save' button on the top right. The form contains two main fields: 'Signing Name *' with a text input field containing 'Listing Forms for 5109 Pine St.', and 'Transaction optional' with a dropdown menu. The dropdown menu is open, showing three options: '5109 Pine St.' (highlighted in blue), '14319 Misty Meadow Ln. (MLS)', and '14319 Misty Meadow Ln. (Realist)'.

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.

The screenshot shows the configuration page for a transaction. The interface includes a sidebar with navigation icons and a main content area with the following settings:

- Transaction Title:** Listing Forms for 5109 Pine St.
- Step 1: Details:** Completed (indicated by a green checkmark).
- * Signing Name:** Listing Forms for 5109 Pine St.
- Participant Order:**
 - Sign In-line - Signing Participants sign in order.
 - Simul-Sign - First come first serve.
- Accept Counteroffer:**
- Advanced options:**
 - Expiration Date:**
 - Do not set an expiration date.
 - Set this signing to expire on [] at 11:59 PM
 - Reminders:**
 - Do not send reminders.
 - Send reminder in 4 hour(s). Repeat reminder every 4 hour(s).
 - Authentisign ID position:** Top Left
- Next Steps:**
 - Step 2: Participants
 - Step 3: Documents
 - Step 4: Design

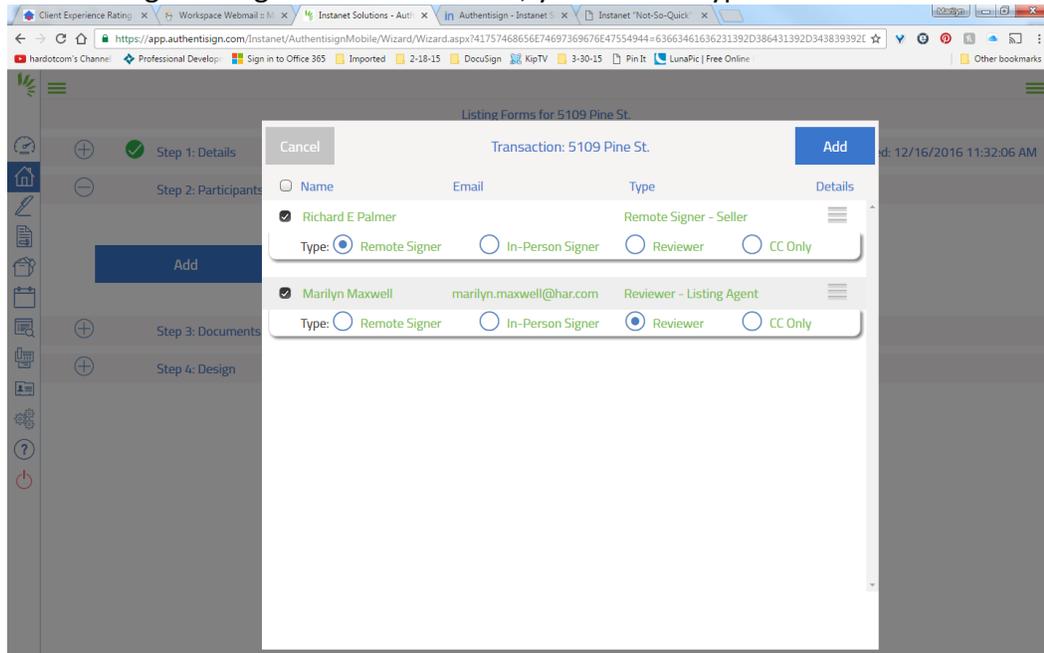
- In Step 2, check the box to the left of a contact to choose Participants (those who will be e-signing) from your address book or by clicking the Add button in the upper right to enter a new contact(s).

The screenshot shows the 'Add' contact modal window. It has a title bar 'Transaction: 5109 Pine St.' and buttons for 'Cancel' and 'Add'. The modal contains a table with the following data:

<input type="checkbox"/>	Name	Email	Type	Details
<input type="checkbox"/>	Richard E Palmer		Remote Signer - Seller	
<input type="checkbox"/>	Marilyn Maxwell	marilyn.maxwell@har.com	Reviewer - Listing Agent	

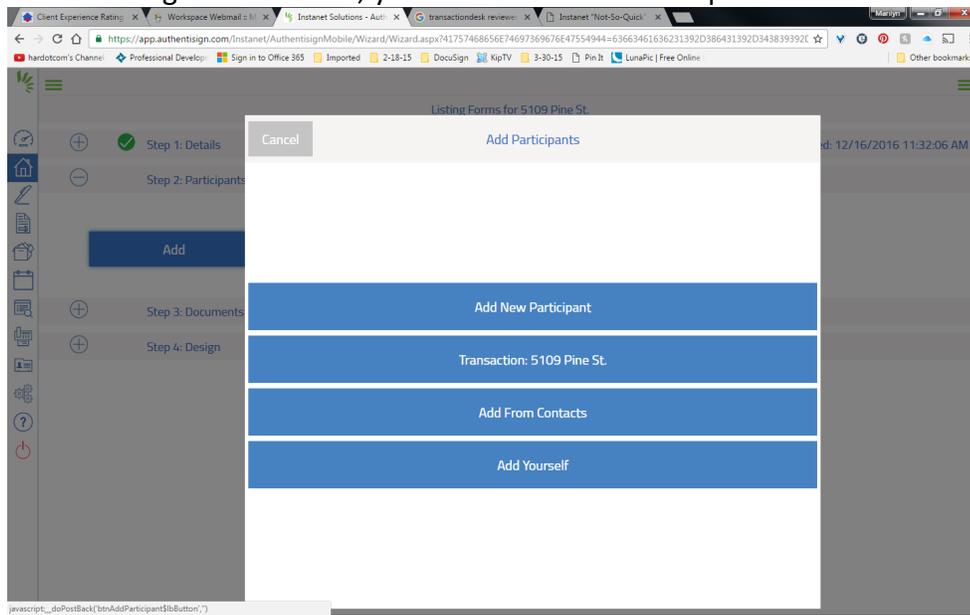
AuthentiSign (electronic signature or paperless signing system)

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



- Remote Signer: not physically present; receiving and signing online
- In-Person Signer: physically present and signing on a tablet, etc. while with you and/or someone who does not have an email address.
- 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.
- CC Only: not a party to the transaction/not signing. Receives copy of signed items after all parties have signed.

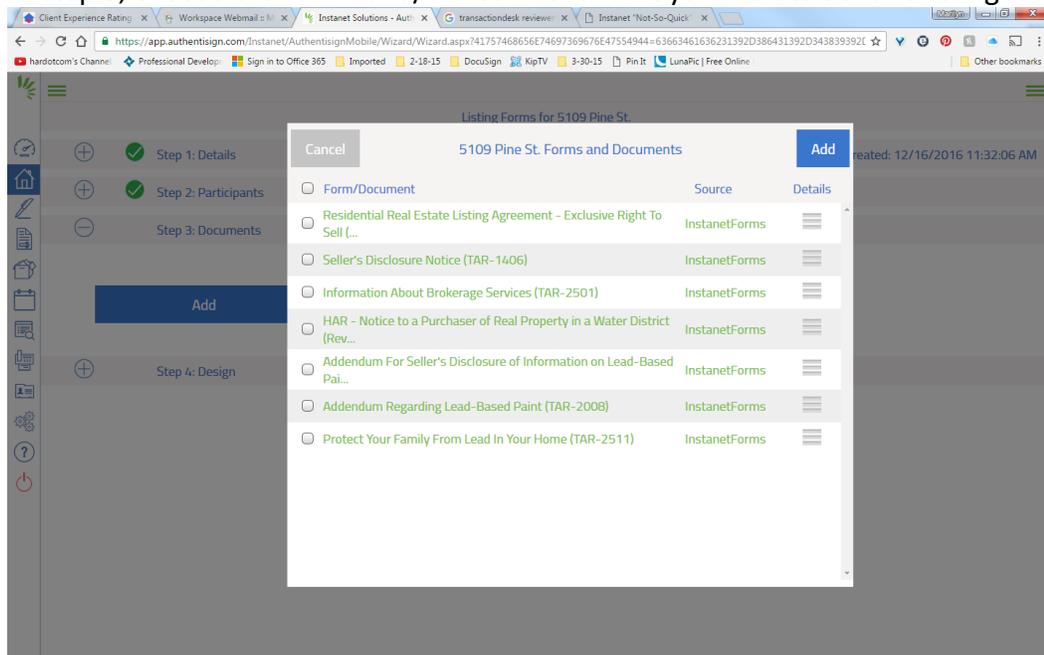
6. When adding new contacts, you have several source options.



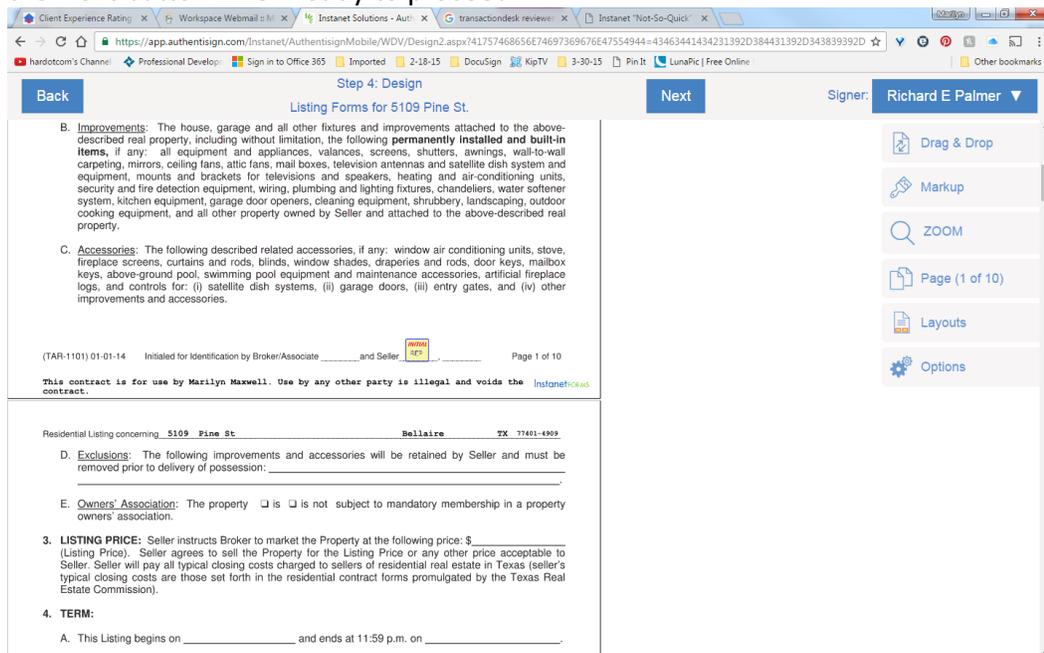
- Add New Participant: add contact from 'scratch' by manually entering info.
- Transaction: pull info. (name, email, etc.) from completed transaction forms

AuthentiSign (electronic signature or paperless signing system)

- 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.

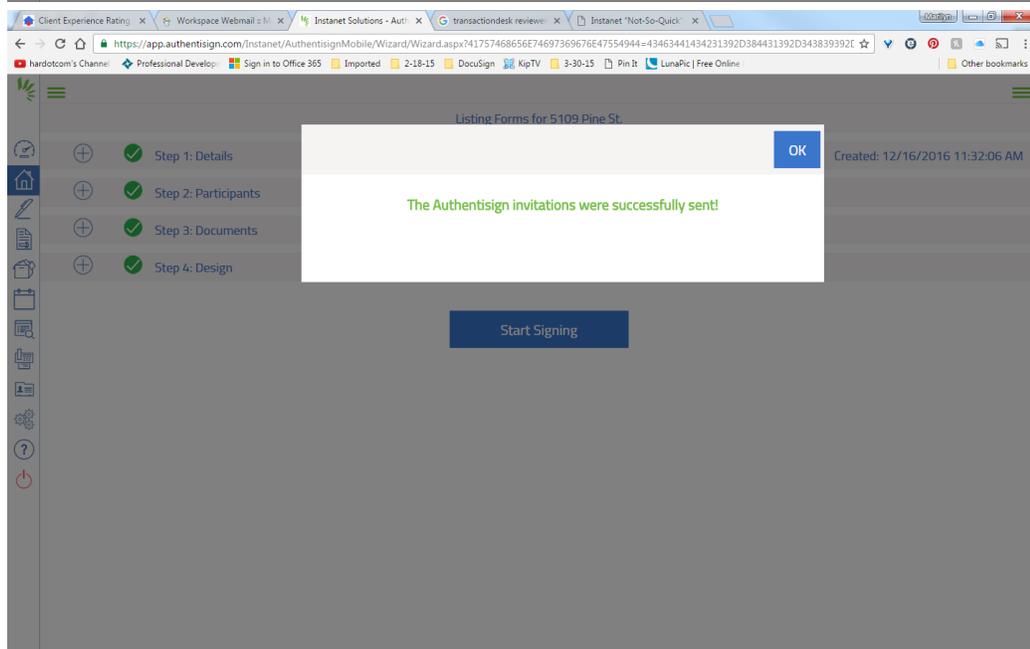
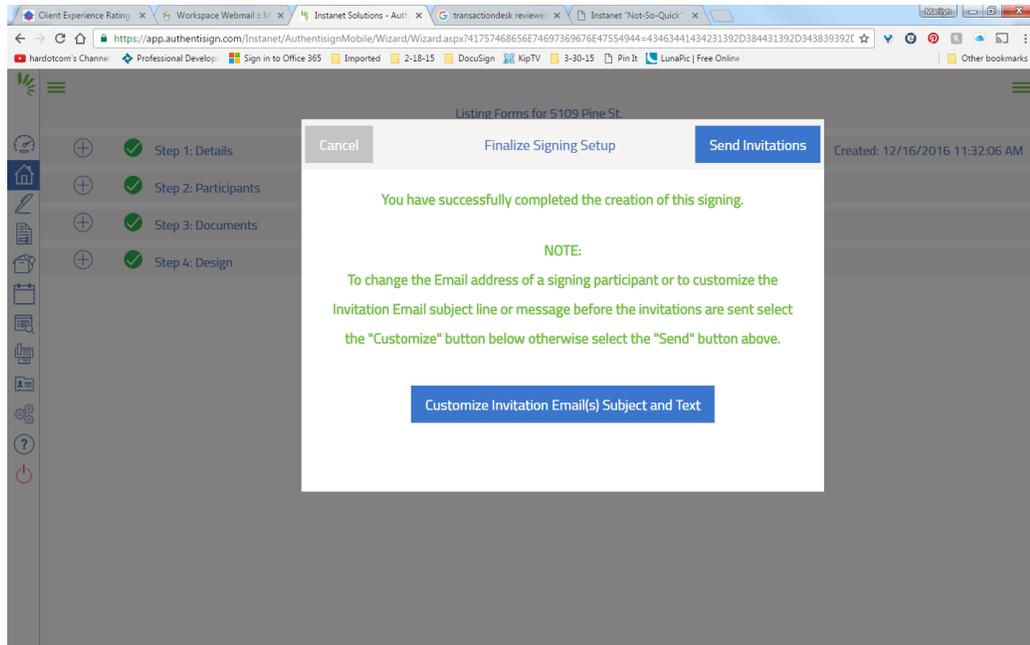


8. The Design step or Step 4 pertains to 'who signs where'. Although TransactionDesk 'knows' where to place the initial and signature fields automatically, you can also edit them, highlight or "markup" the verbiage, etc. using the tools on the right. Click the Next button when ready to proceed.



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

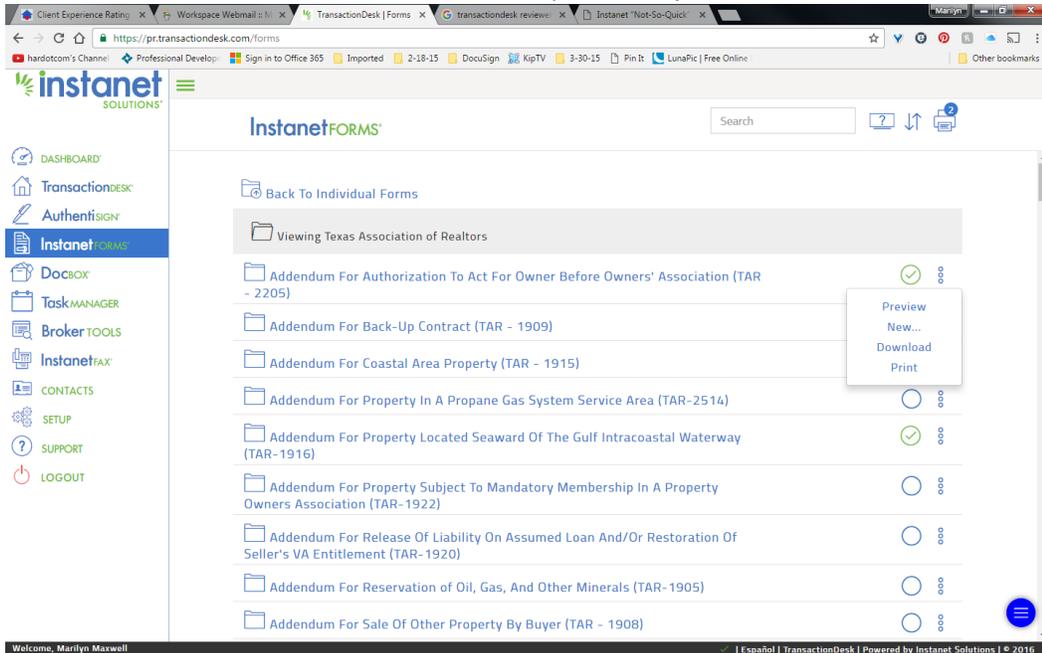
AuthentiSign (electronic signature or paperless signing system)



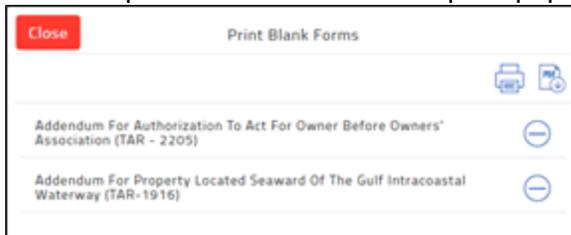
5 InstanetForms

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.



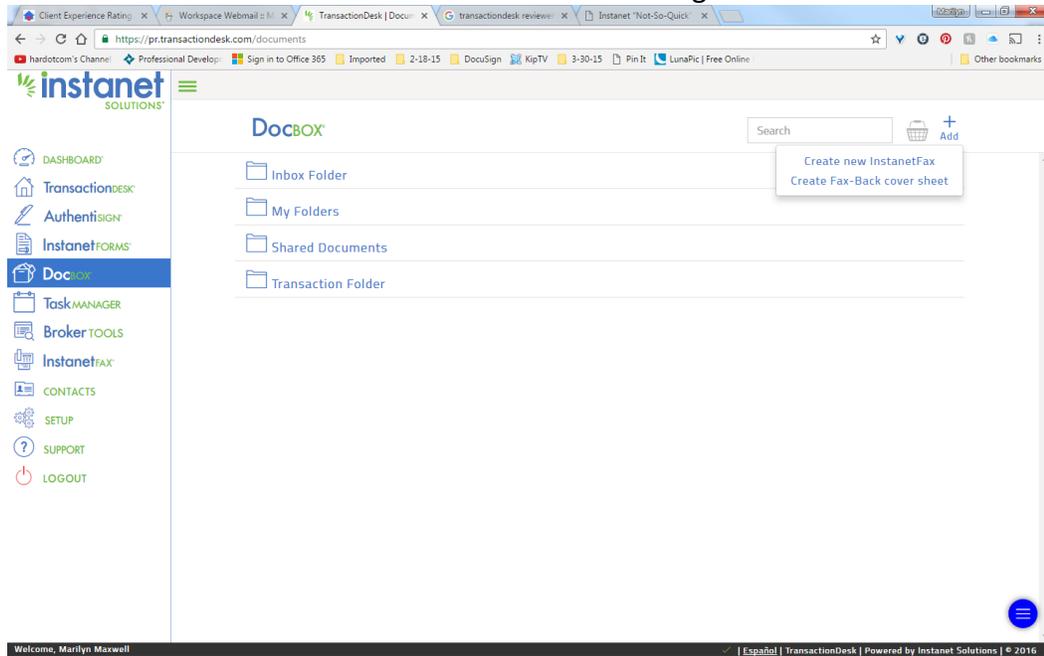
- a. Click the circle to the right of each form to select it. Click the 'stoplight' menu to see other options. As you select multiple forms, the printer icon will show the grand total number of selected forms.
 - b. Use the search box at the top to search by keyword(s) or number.
2. Click the printer 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.

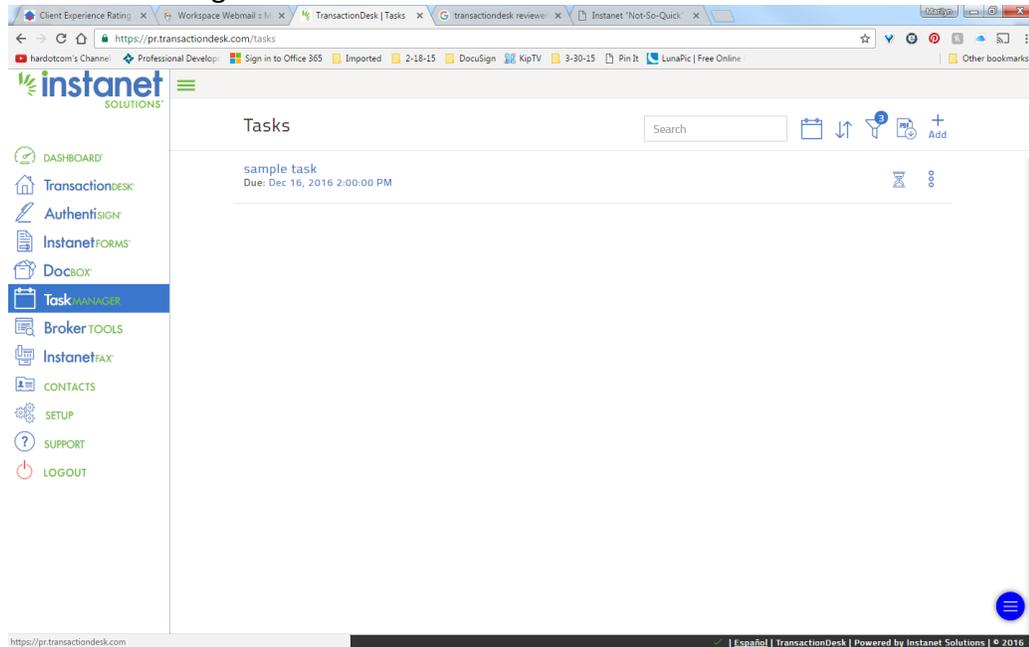


- a. Inbox Folder: items that are sent via email
- b. My Folders: custom folders you create - store anything (pictures, documents, etc. Does not have to be related to a transactions/business at all).
- c. Shared Documents: documents or transactions shared with customers, etc.
- d. Transaction Folder: 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.

Close Create Save

Task Information

Name *

Description

Date/time

Due

Date

Time Any time?

Reminder

Assignees

Available Shares		Shared With
<ul style="list-style-type: none">Demo Account1Demo Account2Natalia CarrilloNathan GobleRene GalvanRichard AguilarShawn DauphineTara Whitting	<input type="button" value="→"/> <input type="button" value="←"/>	<ul style="list-style-type: none">Cristina Schaefer

Notifications

Notify assigned members via email?

Notify owner on status change?

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.

