

## About TransactionDesk

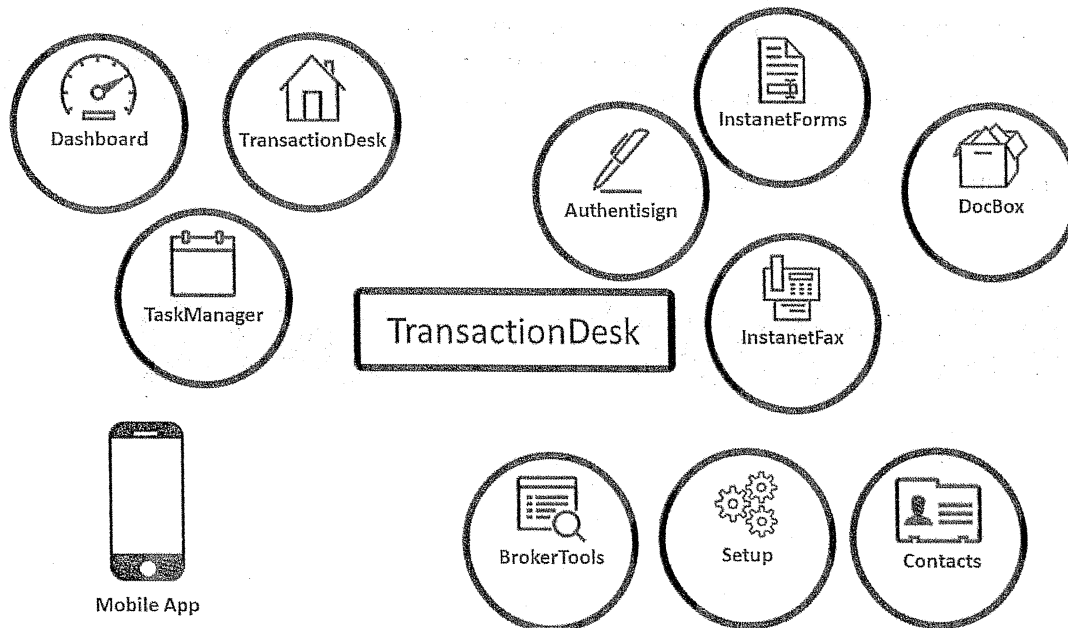
### Summary

Provides a conceptual overview of TransactionDesk and its components.

### Content

TransactionDesk is a cloud-based transaction management system designed to help real estate brokerages manage their listings, sales, and leases online. TransactionDesk provides everything a brokerage needs to manage, execute, and process deals, including electronic forms, eSignatures, client communications, and document storage.

TransactionDesk has multiple functions and components.



### Dashboards

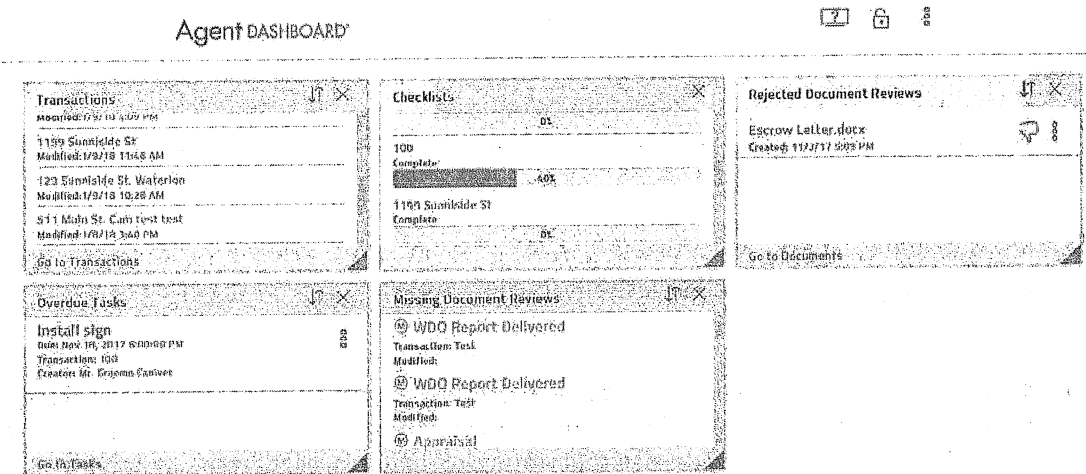
Use the dashboard to quickly see the status of your deals and deal-related information. Click the dashboard icon to see your own personal dashboard.

The dashboard is completely customizable. You can choose the widgets to include in your dashboard, so that you can include the information that is most important to you.

There are two dashboards that are available, depending on your role:

- Agent dashboard
- Broker dashboard

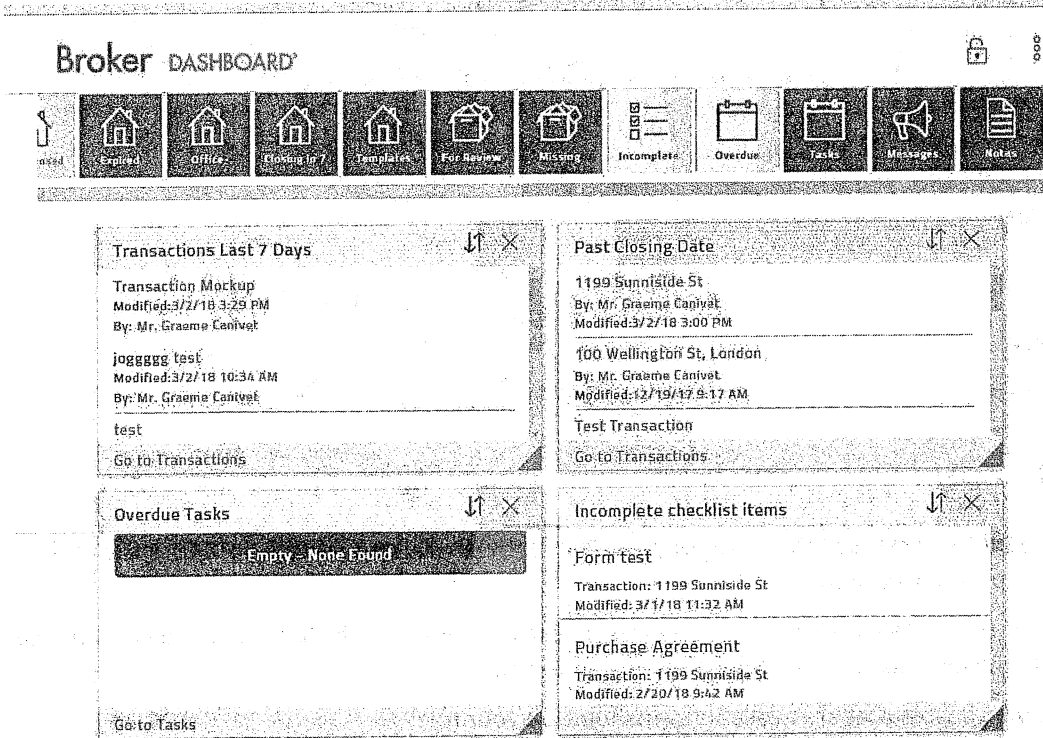
The following is an example of an Agent dashboard:



Broker dashboard



















The Broker dashboard is available to brokers and staff users, and provides a quick summary of the status of deals and deal-related information at the office level. Brokers and staff can view key indicators, such the deals closing in the next seven days, the number of overdue tasks, or deals missing documents. Brokers and staff can also switch to view their Agent dashboard, so they can manage their own deals, or enter deals on behalf of an agent.

The following is an example of a Broker Dashboard:



# TransactionDesk

TransactionDesk is the list of your transactions, or the transactions that are shared with you.

TransactionDESK		Search						
	4450 Twiggs Dr Residential Listing, <span>Active</span> Modified: 5/1/18 3:37 PM	Complete	<div style="width: 23%; background-color: #ccc; height: 10px;"></div> 23%	<input type="radio"/>				
	5534 Elm Street Residential Listing, <span>Active</span> Modified: 5/1/18 2:42 PM	Complete	<div style="width: 54%; background-color: #ccc; height: 10px;"></div> 54%	<input type="radio"/>				
	9430 Vista View Dr None, <span>Active</span> Modified: 4/26/18 9:22 AM	Complete	<div style="width: 80%; background-color: #ccc; height: 10px;"></div> 80%	<input type="radio"/>				
	7708 Main Street Residential Listing, <span>Active</span> Modified: 4/25/18 11:40 AM	Complete	<div style="width: 93%; background-color: #ccc; height: 10px;"></div> 93%	<input type="radio"/>				
	1199 Sunnyside St Residential Sale, <span>Active</span> Modified: 4/18/18 1:11 PM			<input type="radio"/>				
	123 Main Street Residential Sale, <span>Active</span> Modified: 4/18/18 1:11 PM	Complete	<div style="width: 13%; background-color: #ccc; height: 10px;"></div> 13%	<input type="radio"/>				


Here, you can view transactions and their status, or you can create new transactions by clicking Add +.

When you see a transaction in the list, you see the photo thumbnail, the name of the transaction and its status, and the last modified date, as shown below:

	7899 MLS Blvd Commercial Sale, <span>Active</span> Modified: 5/25/18 9:16 AM	Complete	<div style="width: 25%; background-color: #ccc; height: 10px;"></div> 25%	<input type="radio"/>	
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If your transactions use a checklist, you can see the progress of the checklist. In the example above, the checklist is 25% complete.

You can also view the details of a transaction, such as the contacts, forms, documents, checklist, tasks, or

signings, and you can also see the history of a transaction, all from the More Options menu  to the right of the transaction name.

## Forms and Documents

In TransactionDesk, a form is distinct from a document. Documents are any type of information other than a form that you collect regarding the deal from your client or other third party. Documents are not interactive, and where applicable, are filled in outside of TransactionDesk. Listing photos, scanned pen-and-paper contracts, scanned receipts of deposit checks, commission disbursements, lawyer letters, commission statements, and client profiles are common examples of documents.

Forms represent legal contracts that are filled out interactively online. They are usually provided by your board, association, or broker, and are reviewed to ensure compliance and protect all involved parties legally.

## InstanetForms

Use InstanetForms to store, organize, manage, access, and work with your TransactionDesk forms.

InstanetForms provides a form library for your MLS board and brokerage forms.

When you attach a form to a transaction, TransactionDesk can automatically fill in many of the form fields for you, saving you time and preventing errors in form filling.

## DocBox

Use DocBox to store, organize, manage, access, and work with your TransactionDesk documents. Consider DocBox as your TransactionDesk inbox, where you receive and store documents until you need them for a transaction.

You can store documents in DocBox in the following file formats:

- .pdf
- .doc
- .docx
- .xls
- .xlsx
- .jpg/.jpeg
- .gif
- .bmp
- .tif
- .png

DocBox organizes documents in four main folders, each with its own unique purpose:

- Inbox Folder
- My Folder
- Shared Documents
- Transaction Folder

The Inbox folder contains documents that are mailed to one of your transactions are stored.

The My folder is contains any documents you manually upload.

The Shared folder contains any documents that other users share with you.

The Transaction folder contains documents that are attached to your transactions.

## Authentisign

Authentisign is a paperless eSignature tool that helps you get documents and forms signed by all parties, including clients, without having to print them. You identify who needs to sign the documents or forms, and by when, and as long as each participant has an email address, Authentisign takes care of the rest.

For agents, brokers, or staff members who sign multiple documents or forms, you can create a signature file, and reuse it as required.

## Task Manager

The Task Manager lets you create lists of standalone tasks that can be assigned to you, or to another member of your team, or to someone in your office. If applicable, you can assign a specific due date for a task.

Tasks can also be created as part of a checklist. When the checklist is attached to a transaction that you own or that is shared with you, those tasks are also displayed in the Task Manager.

The tasks displayed in the Task Manager include the standalone tasks that are assigned to you, or shared with you, plus the list of tasks that are associated with any transactions you own or that are shared with you.

Tasks that are part of a transaction appear with the transaction name in the list of tasks. Tasks without a transaction name displayed are standalone tasks. If a task has a due date, the due date also appears with the task name in the list of tasks.

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### Contact Mortgage Broker

Due: May 28, 2018 3:00:00 PM

You can filter the list of tasks to display only those open tasks, only those tasks that are assigned to you, and so on.

## Broker Tools

Broker Tools provides functionality that is useful to brokers, helping them manage office settings, templates for Authentisign, transactions for the office, and document review. Staff users with Super User access to TransactionDesk can also access broker tools.

## InstanetFax

InstanetFax lets you create fax cover sheets ready to send with documents or forms. Simply select the contact to send the fax to, add a message, and create and download the cover sheet.

## Contacts

Contacts lets you build your rolodex of contacts online. Then, whenever you need to include a contact in a deal, or email or fax a contact, the information is at your fingertips.

## Setup

Use the Setup options to manage system defaults, such as default dashboards that agents see, standard checklists for the various types of transactions, transaction templates, notification options, and more.

## Support

Access Support when you are looking for the following:

- An email address or phone number to contact Support
- To access live support
- To request training
- To send feedback
- TransactionDesk documentation
- Help videos
- Webinar videos

## Mobile App

The TransactionDesk Mobile App lets agents access TransactionDesk from their mobile devices, such as a cell phone or tablet. Agents no longer need to come into the office to enter their deals into the system.