ADVANCED: Transaction Desk / Authentisign Instructions

A. How to use Preferences, Program Settings, and Sharing:

1. Click the ***Setup*** icon on left side of screen > Click "***Preferences"***
2. Click "***User Information",*** add or change your personal information as desired, and click "***Update".***
3. Click "***Email Signature"***, enter your preferences, and click "***Update".***
4. Click "***Branding"***, enter a personal picture, logo, banner (that will appear on emails or faxes).
5. Click "***Login"*** if you want to change your password, and click "***Update"***.
6. Click on the ***Setup*** icon on left side of screen > Click "***Program Settings"***
   Click **"DocBox*Print Driver Setup"*** if you would like to install a super useful **DocBox Print** driver on your computer. The DocBox Print driver allows you to fax, email and/or upload files into the DocBox Inbox or Transaction folders by virtually 'printing' them from any application on your computer by simply clicking on File, Print, and selecting the DocBox Printer.
7. Click on the ***Setup*** icon on left side of screen > Click "***Sharing"***
   Click on ***Create Share Group*** icon Add at the upper right of screen.
   Give it a name > Save > add members and define their Privilege levels > Update
   Open a Transaction to share > Click on the upper "3 Dot" Menu icon > Share
   Select desired Share Group name > Save (group members will now have access to that transaction).

B. How to use Widgets:

1. Both the "Agent Dashboard" and the "Transaction Dashboard" can be customized with optional widget tools. *Blue widgets* are command shortcuts, while the *green widgets* are data boxes. A *grayed-out widget* indicates it is already in use somewhere on your dashboard.
2. Click on the "3 Dot" icon to "Show Widgets". Drag and drop the widgets to add them to your Dashboard.
3. Click on the "X" in the top right corner of a widget to remove it.
4. Click on the "Lock" icon to "Lock/Unlock Dashboard".
5. Suggested useful widgets: the green *Transactions, Forms, Documents* and *Authentisign* widgets.

C. How to add outside documents to Transaction Desk (5 different ways!)

1. **Upload from device/computer** (to upload a document that you downloaded to your computer earlier)
2. **Email directly to your DocBox Inbox** with the document as an email *attachment* (links won't work).
   "firstname.lastname.1@transactiondesk.com" (e.g. – jim.coffer.1@transactiondesk.com)
   This will also save the text of an email, and voicemail transcriptions (like *Google Voice*) so you can have a thorough paper trail of all communications stored with your online transaction files!
3. **DocBox Print Driver** (installed on your PC) **-** virtually "Print" documents directly to your DocBox Inbox or any transaction folder using the DocBox Print Driver (see installation instructions in section A.6 above).
4. **Import from third party** (Cloud storage options: Dropbox, Google Drive, OneDrive, Box)
5. **Email Upload** – opens your email client pre-addressed to your Inbox or current transaction folder.

Options 1, 4, and 5 will appear as menu choices when you click Add from any Documents page or from within any DocBox folder, or when you click "Add" in the Authentisign module's "Step 3: Documents".

D. How to *move / merge / copy / print / fax / email / delete* documents in *"DocBox":*

1. Click on ***DocBox*** icon on left side of screen.
2. Open the Folder where your desired documents are located ("Inbox Folder" if you emailed a document).
3. Checkmark the circle(s) to the right of the documents you want to include. The signed versions will have the ***Certified and Digitally Signed*** icon next to them.
4. Click the ***Basket*** icon at the top of the page.
5. Click the icon of your choice:

    Move to move to a different folder.

    Merge to combine multiple documents into one.

    Copy to copy to a folder or transaction.

    Copy to Cloud to copy to Dropbox, Google Drive, OneDrive, or Box cloud storage options.

    Print to print a hard copy.

    Fax to fax directly from Transaction Desk.

    Email to email directly from Transaction Desk - "Send as attachment" recommended.

    Delete

E. How to *download / markup / rename / remove pages / rotate pages / rearrange pages* in *"DocBox":*

1. Click on ***DocBox*** icon on left side of screen.
2. Open the Folder where your desired documents are located.
3. Click on the name of the document you want to work with which will open a "Preview" screen.
4. Click the icon of your choice: **Download**. **Markup**. **Rename**. **Slice** to remove, rotate, or rearrange pages. (NOTE: you can rotate pages from this "Preview" page, but it is for viewing purposes only, but you can't "Save" them. (See #6 below for instructions on how to rotate and "Save")
5. To **Remove** pages: Open your document > Click the *Slice* icon > Click on pages to remove > Click the *Remove Pages* icon > Confirm "Yes" > Close > *save changes?* "Yes" (or to retain the original: after confirming page removal, Click Save > then "Save As" > Name it > Save > Close > *save changes?* "No")
6. To **Rotate** pages (and save): Open your document > Click the *Slice* icon > Select the page(s) to rotate > *Rotate* (right or left) > Click Save > Select "Save" or "Save As" > Click Save > Close
7. To **Rearrange** pages: Open your document > Click the *Slice* icon > Drag and drop pages to rearrange their order > Save > Select "Save" or "Save As" > Click Save (again) > Close

F. Alternate Login through RealTracs MLS:

1. Login to www.realtracs.net
2. *Search* > *MLS#* > enter desired MLS# (or use *1234567* as a random sample) > Search
3. *More* > *Transaction Desk* > *complete "Create Transaction"* fields (or *Close* if you used a random MLS# just to login through the MLS).

G. How to create and complete a new *“TransactionDesk”* transaction with e-signatures (these instructions are for an example of a buyer side purchase transaction):

<u>Transaction Desk Module (to fill out forms and upload documents)</u>

1. Click on the ***Transaction Desk*** icon on the main menu on the left side of screen.
2. Click on ***Create Transaction*** icon at the upper right of screen.
3. *Name* – give your new transaction a logical (and searchable) name (for example: *Rothbard, Murray & JoAnn – 1776 Liberty St*)
4. *Template* – select “TRA Residential Buyer’s Package” (or a Stand-alone form)
5. *Import Data* – select “RealTracs” and add the MLS number.
6. *Add me as the* – “Selling Agent” (when you are working on the buyer side)
7. Checkmark the “Use Wizard” box.
8. Click “***Create”.***
9. **“Details – Step 1 of 5”** should open. Complete all relevant fields. Entries here will be auto-populated on the forms to save you time later on.
10. Click ***“Next”*** (at top)**.** Don’t click “Save and exit” or you will leave the wizard.
11. If you ever accidently “exit” the wizard, open the <u>right</u> green hamburger menu (on upper right of screen) and click *“Transaction Wizard”* to get back on track.
12. **“Transaction Dates – Step 2 of 5”** should open. Complete all relevant fields. Entries here will be auto-populated on the forms to save you time later on.
13. Click ***“Next”*** (at top)**.** Don’t click “Save and exit” or you will leave the wizard.
14. **“Contacts – Step 3 of 5”** should open.
15. Click the ***Add Contacts*** icon at the upper right of screen.
16. Create new, or add existing contacts (parties), including yourself. Select “Type” (Buyer or Seller), and be sure to enter the correct email addresses as these will be used for signing invitations.
17. Click “Save” (in upper right of contact info box), and repeat process to add additional contacts.
18. Click ***“Next”*** (at top)**.** Don’t click “Save and exit” or you will leave the wizard.
19. **“Forms – Step 4 of 5”** should open.
20. Click on the form name you desire, and complete the form by filling in the required fields and checkboxes.
21. If you are using more than one form, click your browser’s ***Back Button*** ← (or “File > Exit”) to return to the Forms page. ***Repeat for each form,*** opening and filling out forms as needed.
22. If you need to add additional forms that are not already listed on the Forms page, click the ***Add*** icon at the upper right of screen. Add and fill out forms as needed.
23. When you have filled out your final form, click ***“Next”*** (at top).
24. **“Documents – Step 5 of 5”** should open.
25. If you need to add Documents (such as Property Condition or Lead-based Paint Disclosures from the seller, etc.), click the ***Add*** icon at upper right. You can drag and drop or upload files from your computer, or copy documents from your DocBox, or import documents from cloud storage.
26. Click ***“Done”*** (at top)***.***
27. **“Transaction Dashboard”** should open.

Authentisign Module (to add e-signature boxes)

28. Click on ***Authentisign*** icon on the main menu on the left side of screen.
29. **“Authentisign”** should open.
30. Click the ***Add*** icon (in upper right)
31. Click on “Transaction” drop-down menu (the little down arrow on right of box).
32. Select the “name of current transaction”, it should be the one at the top of the list.
33. Type in a “Signing Name” (suggestion: use the same as the transaction name)
34. Click ***“Save”***
35. ***“Step 1: Details”*** page should open***.***
36. Choose either “Sign In-line” (to control the order of signings), or the more common “Simul-Sign” option (if it doesn’t matter who signs first).
37. Click on ***“Step 2: Participants”***
38. Checkmark all parties that will actually be signing one or more forms, and select “type” for each signer. Usually they will be a “Remote Signer” signing on their own device, but “In-Person Signer” is an option where they are personally in your presence and signing on your device (you will create a PIN#).
39. Click ***“Add”***
40. To add even more participants click the blue “Add” button on the left and enter their information. Be sure to include their “Role” (Buyer or Seller), and “Save to Contacts” for future use. Then click “Close”.
41. To rearrange the signing order: click on the arrows under the participant names.
42. Click on ***“Step 3: Documents”***
43. Checkmark all forms and documents to be included.
44. Click ***“Add”***
45. If you want to add additional forms and documents, click on the blue ***“Add”*** button (on the left side) and you will have the option to “Upload a File” from your computer, or Import from the Cloud, or from your “DocBox Documents” inbox if you emailed yourself a document, or from other sources.
46. To *Rearrange* the document order: click on the arrows under the document names.
47. To *Rotate* or *Delete Pages,* or to *Rename Document*, click on the next to it. Changes made here are only saved in the <u>signed</u> “Final Document” version. (Use DocBox to save changes in unsigned versions.)
48. Click on ***“Step 4: Design”***
49. Click on ***“Drag & Drop”*** (in upper right) to drag & drop the “SIGN HERE” and “INITIAL HERE” boxes to the desired locations in your forms and documents. The “Signer” drop-down menu (in the upper right corner) will contain the names of all participants, and you will need to Drag & Drop the required boxes for <u>each</u> individual signer to the proper locations within the form(s).
50. Click on ***“Markup”*** to access tools to checkmark a box, or fill in a text field if needed.
51. Click ***“Next”*** (at top).
52. Click ***“Send Invitations”.***
53. Check your email. You will receive email progress reports (subject: “Authentisign Signing Action”) as each party signs the document, and an “Authentisign Signing <u>*Final*</u> Revision” email when all parties have completed signing. Click on the first link in that *“Final”* email to view, save or print the signed document.
54. Forward that “Authentisign Signing <u>*Final*</u> Revision” email (which has the document link) to the cooperating agent and any other parties (lenders, etc) that require a copy of the document. Be sure to use a “read receipt” app (e.g. – Boomerang for Gmail) to confirm that your forwarded email was opened. Any signers will have already received a similar email from Authentisign so you won’t have to send it to them, but you may want to get a written confirmation that they did receive it. You could also download a copy of the final document to your computer and then attach it to a separate email to distribute as needed (with “read receipts”), or you could simply email copies directly from your DocBox.