BASIC: Transaction Desk / Authentisign Instructions

A. Login directly to *Transaction Desk*:

1. Go to https://tnrealtors.com/
2. Click "***Member Login"***
3. Enter Username and Password (if unknown call TAR at **(615) 321-1477,** *OR* go to https://pr.transactiondesk.com/TAR)
4. Click ***"Log In"***
5. <u>Hover</u> curser over "***Members"*** to view pop-up menu
6. Click ***"TransactionDesk"*** (this should take you to your "Agent Dashboard" page)

B. Alternate Login through RealTracs MLS:

1. Login to www.realtracs.net > *Search* > *MLS#* > enter desired MLS# (or use *1234567* as a random sample) > *More* > *Transaction Desk* > *Create* (or *Close* if you used a random MLS#)

C. Support for Transaction Desk:

1. Call **(800) 668-8768** for 24/7/365 support.
2. Click the ***Support*** icon on the left side of the page to access Help Videos, Guides (pdf booklets), Pre-Recorded Webinars, and Online Training.

D. How to print blank *"InstanetForms"*:

1. Login to *Transaction Desk*.
2. Click ***InstanetForms*** icon on the left side of screen.
3. Locate the desired form(s). Checkmark the circles to the right of the forms you want to print.
4. Click ***Print Blank Forms*** icon at top of screen. The icon number indicates how many forms you have loaded into your print queue.
5. Click ***Print*** icon from the pop-up menu, and ***"Print"***.

E. How to fill out and print *"InstanetForms"* (without signatures):

1. Login to *Transaction Desk*.
2. Click ***InstanetForms*** icon on the left side of screen.
3. Locate and click on the desired ***"form name"***.
4. Click on ***"Create new stand-alone form"***.
5. Complete your form by filling in the blanks and checking the appropriate boxes.
6. Click ***File*** icon at top of screen, then click ***Print*** icon from the drop-down menu.
7. Repeat for each additional form desired.

F. How to *“Authentisign”* an already completed form or document:

1. Download the desired form or document to your computer’s desktop (or to another location on your computer that will be easy for you to find), <u>OR</u> upload to the Cloud, <u>OR</u> email the form or document (as an *attachment*) directly into *Transaction Desk* (see Section J.1. for instructions on how to email directly to your *DocBox Inbox*).
2. Login to *Transaction Desk*.
3. Click on ***Authentisign*** icon  on the main menu on the left side of screen.
4. Click on ***Create Authentisign*** icon  at the upper right of screen.
5. Give it a name, select transaction (if any), and check the “Go to new signing?” box.
6. Click ***“Save”***, and the Authentisign page should open to ***“Step 1: Details”***.
7. Choose either “Sign In-line” or “Simul-Sign” option.
8. Click on ***“Step 2: Participants”***
9. ***“Add Participants”***. Include name, email, role (Buyer or Seller), and type (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 (uses a PIN#).
10. You can rearrange the signing order by clicking on the arrows under participant names.
11. Click on ***“Step 3: Documents”***
12. ***“Add Documents”*** by “Upload a File” from your computer, or selecting one from your “DocBox Documents” Inbox (if you emailed it there), or from the Cloud or other sources.
13. Click on ***“Step 4: Design”***
14. Click on ***“Drag & Drop”*** (on upper right side) to place the “SIGN HERE” and/or “INITIAL HERE” boxes. 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 each individual signer to the proper locations within the form.
15. If needed, click on ***“Markup”*** (on right side) to access tools that can be used to checkmark a box, or fill in a text field.
16. Click ***“Next”*** (at top).
17. Click ***“Send Invitations”.***
18. 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.
19. 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.

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):

Transaction Desk Module (to fill out forms and upload documents)

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.

H. How to email/print/fax completed documents from *"DocBox":*

1. Login to *Transaction Desk.*
2. Click on ***DocBox*** icon .
3. Click on **"Transaction Folder".**
4. Locate and click on the "name of transaction" you want to access.
5. 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.
6. Click the ***Basket*** icon at the top of the page.
7. Click the icon of your choice to ***Email***, ***Print***, or ***Fax***.
   If emailing, it is recommended that you select the "Send as attachments" option.

I. How to open an existing Transaction and locate its forms, documents, and signings:

1. Click on the ***Transaction Desk*** icon on the main menu on the left side of screen.
2. Click on the "3 Dot" icon to the right of your desired transaction.
3. Click on "Dashboard" to open the transaction, or "Forms" or "Documents" or "Signings" to open those.

J. How to email a Document directly to your DocBox Inbox:

1. Email the document as an email *attachment* (links won't work) to:
   "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!

K. Setup: Options, Preferences, and Settings

1. Click the ***Setup*** icon on left side of screen
2. Click "***Preferences"***
3. Click "***User Information"***
4. Add or change your personal information as desired, and click "***Update".***
5. Click "***Email Signature"*** and enter your preferences, and click "***Update".***
6. Click "***Branding"*** and enter a personal picture and/or logo (that will appear on emails), click "***Update"***.
7. Click "***Login"*** if you want to change your password, and click "***Update"***.
8. Click on the ***Setup*** icon
9. Click on ***Setup*** icon > *"Program Settings"* > "***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.

L. 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 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.