

TransactionDesk Release



LONE WOLF
TECHNOLOGIES

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1. **Ability to enable or disable new email notifications to SuperUsers** when notes are added to a document, allowing users to stay up-to-date on the status of a transaction at all times.

Super User

- Super User - New Note Added to a Document
- Super User - New User Login
- Super User - Notify Deleted Transaction
- Super User - Notify Deleted Transaction Document
- Super User - Transaction Status Change
- Super User - Transaction Status Change [Active]
- Super User - Transaction Status Change [Closed-File Complete]
- Super User - Transaction Status Change [Closed]
- Super User - Transaction Status Change [Expired]
- Super User - Transaction Status Change [Open]
- Super User - Transaction Status Change [Pending]
- Super User - Transaction Status Change [Withdrawn]

Save

2. **Updated Checklist Progress Bar** to only calculate based on mandatory items, allowing broker owners to specify whether transaction progress is based on all items or only mandatory items. Ultimately, this will allow brokers to monitor deal progress across their brokerage according to their specific work workflow.

Office Settings

Sunset Realtors of Ontario, 155 Sunnyville Lane Austin AL 00000

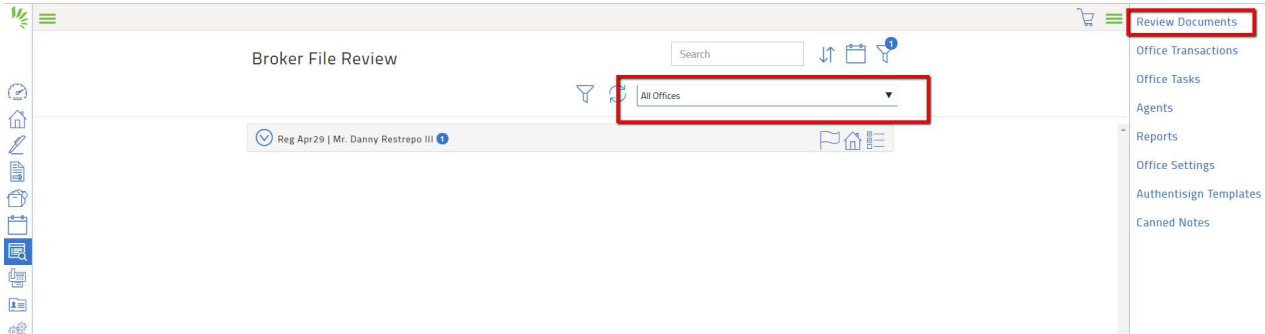
Allow Agents to Delete Transactions	No
Show Vendors to Participants	No
Force Agents to use Templates	Yes
Task Reminders for:	None
Only track Mandatory Items in Progress Bar	No

Warner Real Estate, 35 Heber St. Trenton ON

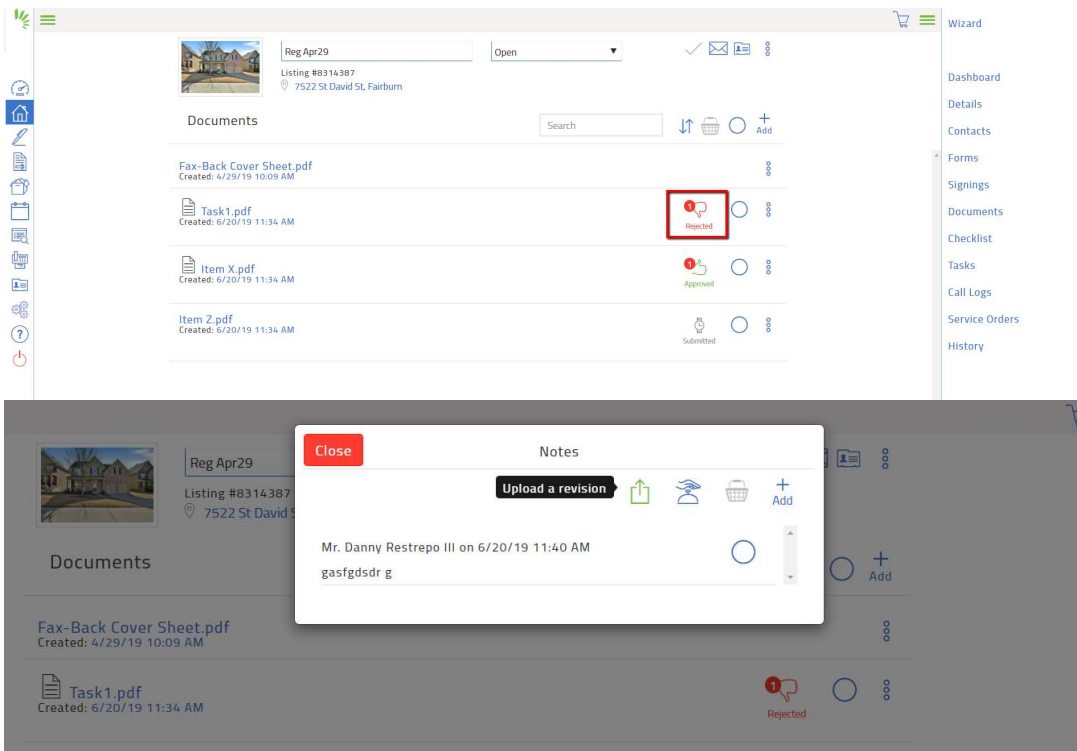
Allow Agents to Delete Transactions	Yes
Show Vendors to Participants	No
Force Agents to use Templates	No
Task Reminders for:	None
Only track Mandatory Items in Progress Bar	No

Review Documents
Office Transactions
Office Tasks
Agents
Reports
Office Settings
Authentisign Templates
Canned Notes

- 3. **Added ability to select “All Offices” in the Broker File Review office drop down.** This enhancement will allow staff members to view all tasks that they are responsible for across all offices in one screen – saving time and reducing risk of missed documents.

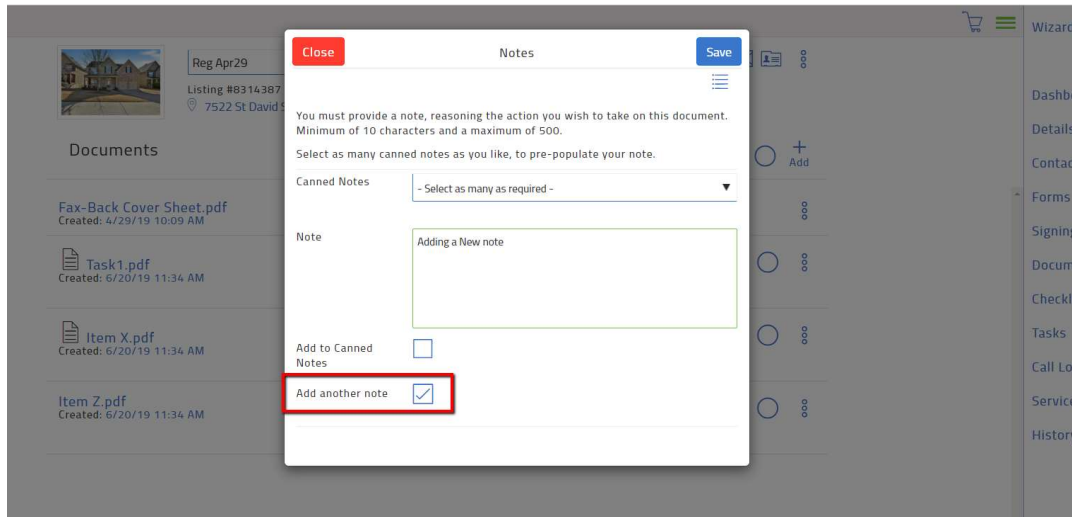


- 4. **Created the ability to upload a new version of a document from the thumbs down icon.** Agents will now have the ability to upload a new version of a document for review from the same place they review notes. This will save agents time and reduce chance of uploading revisions to the incorrect location.



5. Updates to Notes Modal

In order to streamline the note process and save time, users will now have the option to select *Add Another Note* and leave several notes at a time without leaving the notes screen.



6. Light UX changes including new and updated icon placement, improved calls to action to increase agent adoption.

