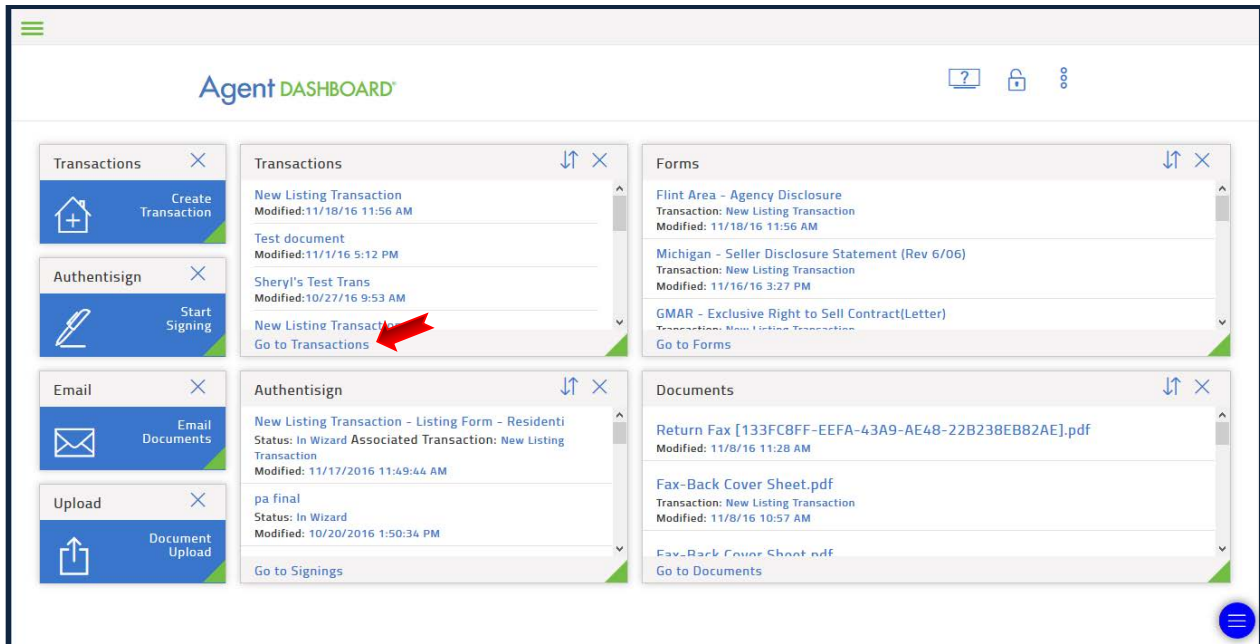




## Key Tips to Guide You in Navigating the New Transaction Desk™ Interface

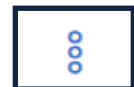


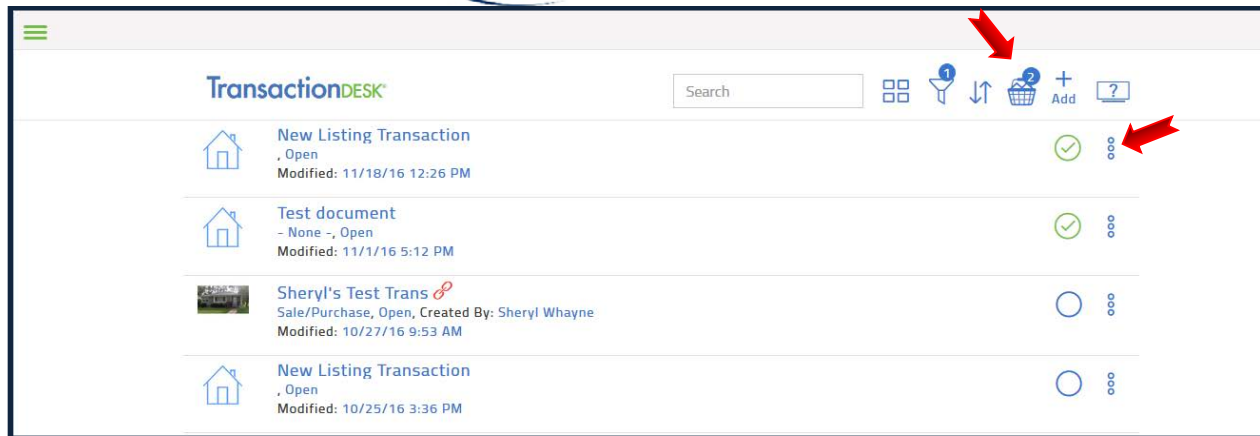
**The Agent Dashboard** – This is the first screen you will see upon switching to the new interface. The desktop is fully customizable, allowing you to add and remove the “modules” that you will use the most. There are modules that you can add for various actions you might perform as part of the transaction. These modules include your forms, documents, signings, etc. The new desktop will save you time by providing shortcuts to the most recently used modules. Simply click the name of one of the last used items in the appropriate module. To receive a full list of items, simply click the “Go to” link near the bottom of the module. For Example: “Go to Transactions” or “Go to Signings”.



**The Main Menu** - This menu bar (*shown at far left*) can be found on every screen within the new interface and is used to navigate throughout Transaction Desk™. To expand the menu bar and display text descriptions of each of the buttons, simply click the three horizontal lines to the right of the fan shaped logo.

**The 3 dots** – This button (*shown at far right*) is used to pull up a menu to perform an action on a single item. This can be used to print a form, mark up a document, or any other action you wish to take with that single item.





**The Basket** – This button is found on each individual module. It's used to perform an action on a group of selected items. Items can be selected by checking the circle on the right hand side of the item. This could be used to print several forms, or start a signing from those forms, delete multiple transactions, or change their status to closed.



**Quick Start Groups are now Templates** – The quick start groups in the Pro interface that you are used to are now merged with Transaction Templates. These templates can be applied automatically to transactions of a particular type, but function the same as quick start groups.

**[GO HERE](#) for more information regarding the interface improvement.**

We sincerely hope that with the use of this guide, your transition to the new interface can be as seamless as possible. Please remember that Realcomp is here to help and can be reached at 866-553-3430, or by e-mail at [support@realcomp.com](mailto:support@realcomp.com).

We also offer training classes using the new interface. Call us to register for an upcoming session!