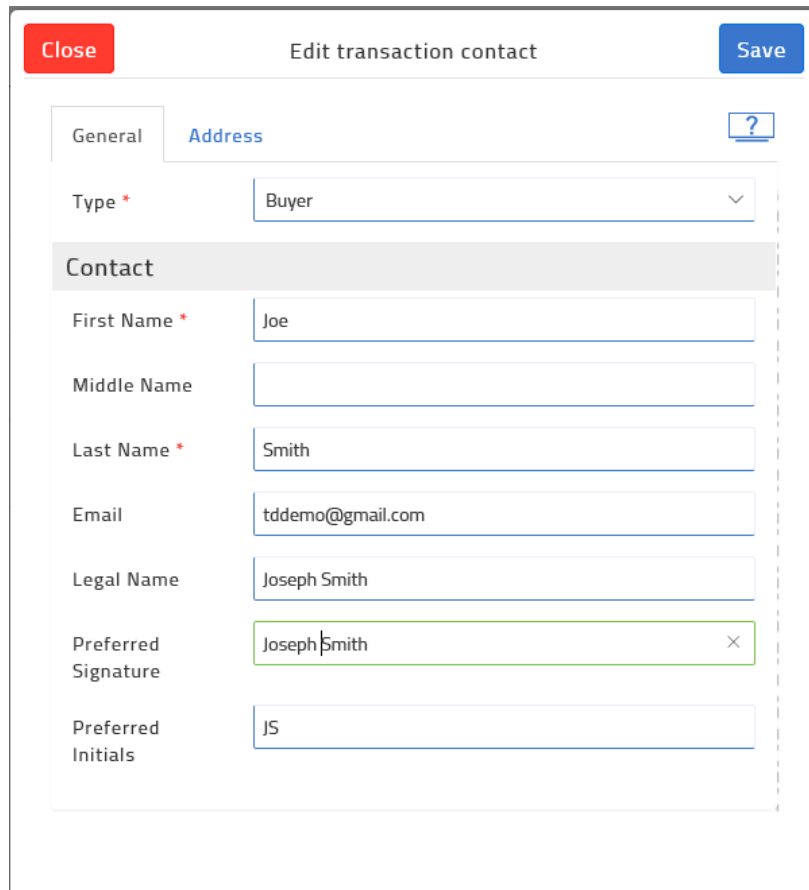


Contacts, Legal Name and Preferred Signatures

When adding a contact to a transaction, sometimes you want the contact to have a different name than the legal name they will use in a contract and for signing. TransactionDesk has the flexibility to handle different situations.

Below is an overview and two examples of how this might be used in a transaction.

1. The “regular” name of a contact is First Name and last name. If you make no other changes (e.g., don’t use legal name), the contact name will be used for contracts and signatures. In the example below it is “Joe Smith”.
2. The Legal Name allows you to use a different name than the name of the contact. In this example, I know the buyer as *Joe*, but his legal name is *Joseph Smith* and he will sign using that name.
3. **Because I entered a *Legal Name*, the *Legal Name* will be used in the forms in this transaction instead of the contact name.**
4. **If you change the name of a buyer or seller in a form, it will change the legal name in the contact and in other forms. It will not change the contact name (*Joe Smith*, in this example).**
5. There are also fields for *Preferred Signature* and *Preferred Initials*. More on that in the next example.

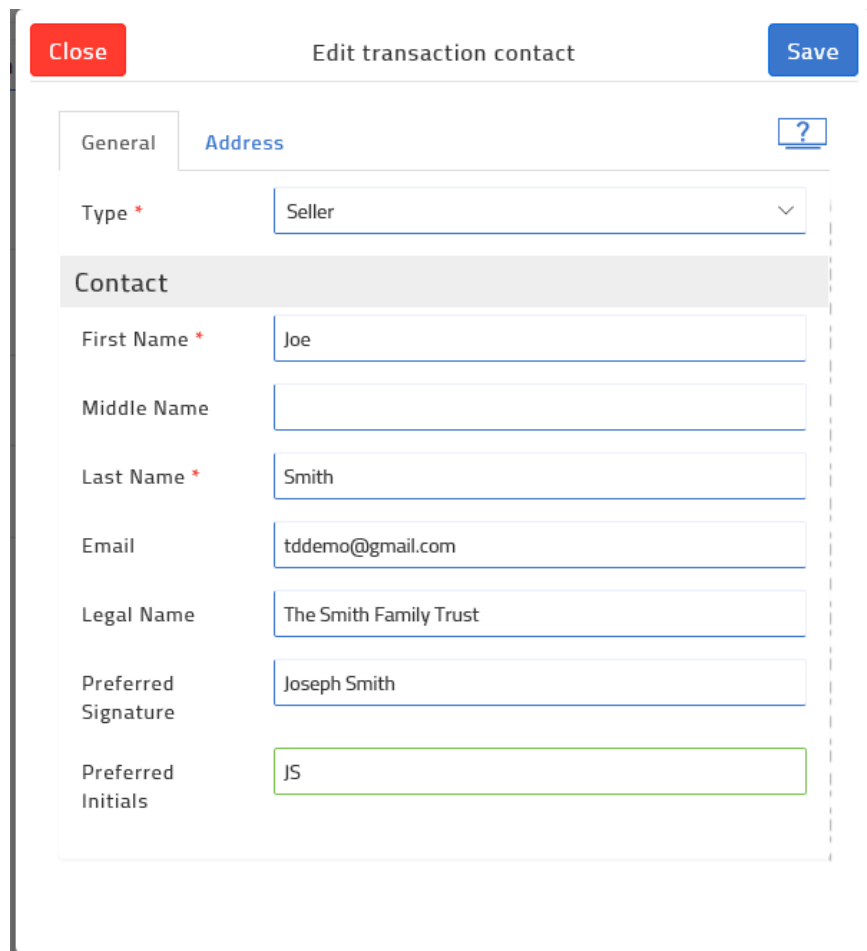


The screenshot shows a web form titled "Edit transaction contact" with a "Close" button on the left and a "Save" button on the right. The form has two tabs: "General" (selected) and "Address". A help icon (?) is visible in the top right of the form area. The "Contact" section is highlighted with a grey background and contains the following fields:

- Type * (dropdown menu): Buyer
- First Name * (text input): Joe
- Middle Name (text input):
- Last Name * (text input): Smith
- Email (text input): tddemo@gmail.com
- Legal Name (text input): Joseph Smith
- Preferred Signature (text input): Joseph Smith (highlighted with a green border)
- Preferred Initials (text input): JS

Sometimes a trust or corporation is involved in a sale or purchase. The Legal Name is made to handle these situations. In the example below:

1. I know my contact as *Joe Smith*, so that's what's in the first and last name fields.
2. The seller and legal owner of the property is actually *The Smith Family Trust*, so I enter that into the *Legal Name* field and that will populate the Seller field in my forms.
3. Joe will be signing for the trust using his legal name, *Joseph Smith*, so that's what I've entered into the *Preferred Signature* field. That will be used when I add him to a signing in Authentisign. In some cases, in some forms, that *Preferred Signature* field will also be mapped to the name label below the signature line.



The screenshot shows a web form titled "Edit transaction contact". At the top left is a red "Close" button, and at the top right is a blue "Save" button. Below the title, there are two tabs: "General" (selected) and "Address". A blue question mark icon is in the top right corner of the form area. The form contains the following fields:

- Type ***: A dropdown menu with "Seller" selected.
- Contact**: A section header.
- First Name ***: Text input field containing "Joe".
- Middle Name**: Empty text input field.
- Last Name ***: Text input field containing "Smith".
- Email**: Text input field containing "tddemo@gmail.com".
- Legal Name**: Text input field containing "The Smith Family Trust".
- Preferred Signature**: Text input field containing "Joseph Smith".
- Preferred Initials**: Text input field containing "JS".