TransactionDesk - Online Forms and Authentisign

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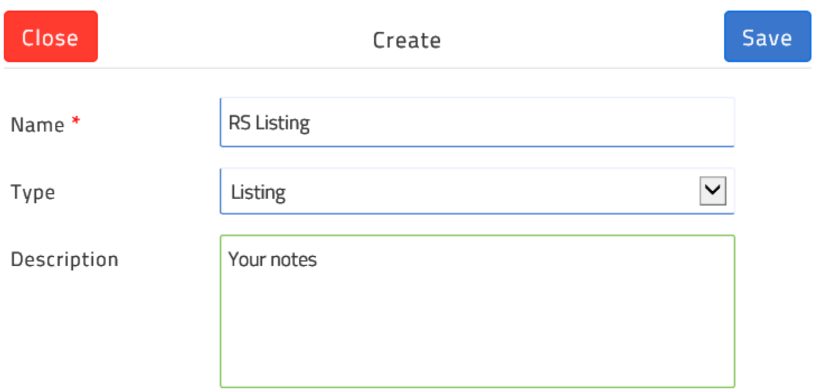
How to Create Transaction Templates

1) From within TransactionDesk, Click on the setup icon on the left side of the screen
2) Select Transaction Templates to the right of the Setup icon
3) Click the Add icon on the top right corner of the page
4) Create box will appear. Name* (RS, CO, VL, LEASE, CM, MF) Property type you are creating a packet for. Type (Lease Listing Sale/Purchase) Description (Use for any notes you wish to add)



5) Click Save in button the upper right corner of the box
6) Transaction Template add Forms by clicking the + to add your forms

7) Add forms to transactions is where you have access to all the Board forms as well as your office forms, if they have been added to Transactiondesk
8) Select your forms by clicking on the folder you wish to use, you can select forms from several folders (ex. **Lead Based Paint, Sellers Disclosure, Disclosure Regarding Real Estate Agency Relationships**)

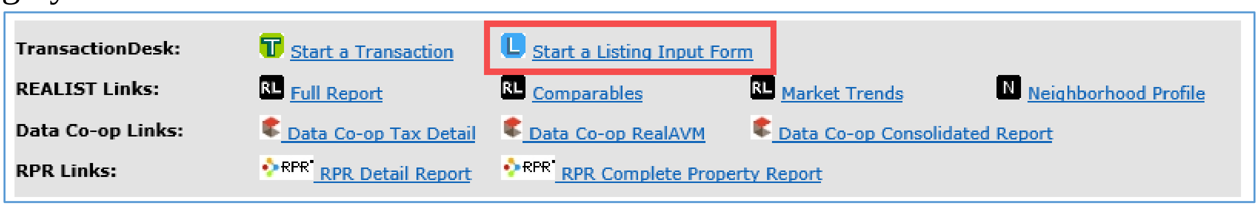
9) After you have made your selection, click the blue Add in the upper right corner of the box

Congratulations you have just created your Transaction Template

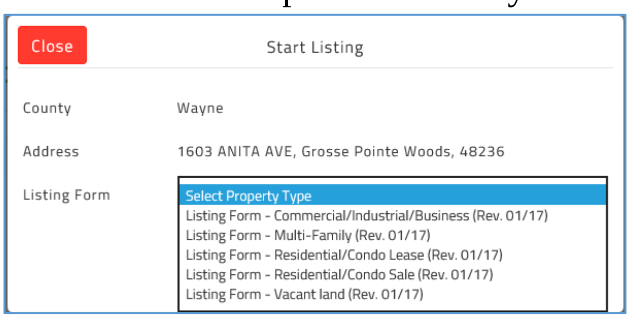
Uploading a Listing

How to start a LISTING using TransactionDesk

1) Click “PRD” tab and select “PRD County Search”.
2) Choose county and type in the address & street name of the property you are listing.
3) Select “Results”.
4) Click the PIN (property ID number). This will open the PRD - Full Detail report.
5) Click the “Start a Listing Input Form” link in the center of the page in the grey section.



6) TransactionDesk opens then asks you to select the property type.



7) Click the “Start” button at the bottom right corner of the box. A listing form will open. After the form is completely filled out, click “Upload Listing” in the upper right corner to submit the listing to the MLS and receive an MLS number. To exit out of the listing form go up to the upper left corner of the form and click on the picture of the folder then scroll down to the bottom and click exit.

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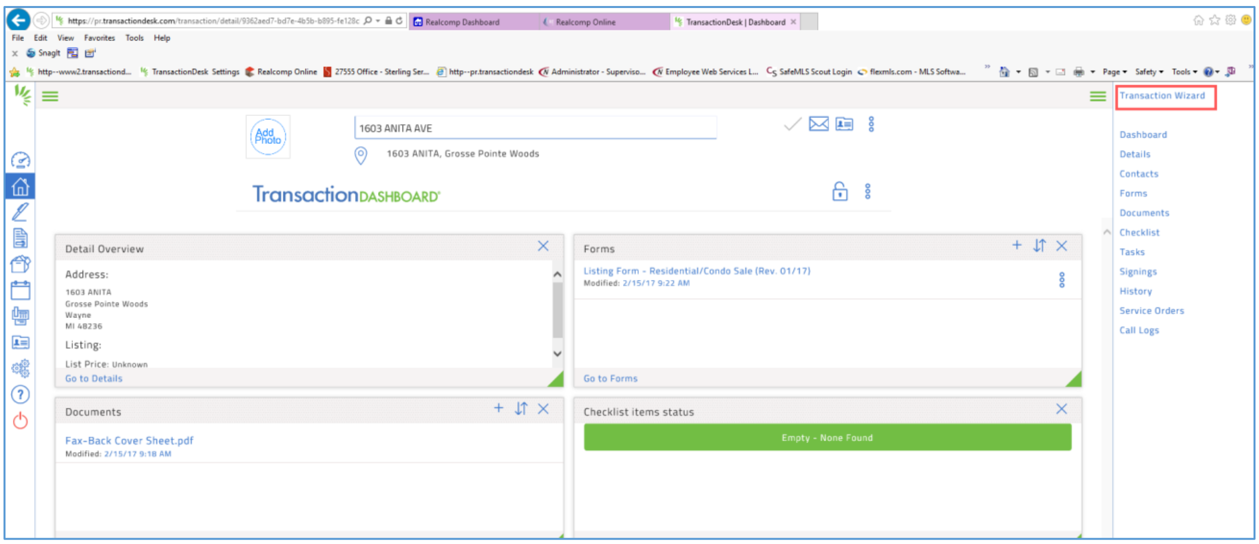
Data-driven, Results-focused MLS

Creating a Listing Transaction using the Transaction Wizard

1) From the Dashboard, select the Transaction with which you wish to work.
2) The Transaction Dashboard screen for the chosen address will open
3) Click “Transaction Wizard” on far the upper right corner of the screen

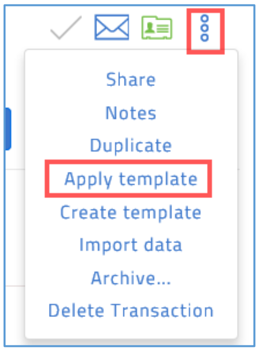


Note: There are 5 steps to the wizard, you navigate through the wizard by clicking **“Next”** to move forward or **“Previous”** to go back. You can complete each step as desired.

4) The wizard screen is now open. It displays the address you selected.
5) **Step 1 of 5** Select the “Transaction Type” and the “Property Type” Click **“Next”**
6) **Step 2 of 5** Enter “Transaction Dates”, if you know them at this time. Click **“Next”**

7) **Step 3 of 5** Enter any Contacts associated with the Transaction. Click **"Next".**

8) **Step 4 of 5** Forms is where you pull in any forms or add the template created by you or your broker. Clicking on the menu icon above the **+ Add** icon. Then select the **"Apply Template"** option, then make your template selection**.** Click **"Apply".**



***Here is where you will want to look your forms over and make any changes or modifications, you can also sort your forms if you wish*. To review your form(s), click on the desired form and it will open. To view another form click "Transaction Forms" at the top to navigate to the next form(s) in your list. To close your form click on the picture of the File folder in the upper left corner of the form and select "Exit" at the bottom. Click "Next"**

9) **Step 5 of 5 Documents** This is where you would pull in any document (i.e. disclosures, legal documents, land surveys, etc.). If you have no documents to add click **"Done"**

YOU HAVE COMPLETED CREATING YOUR TRANSACTION USING THE TRANSACTION WIZARD!

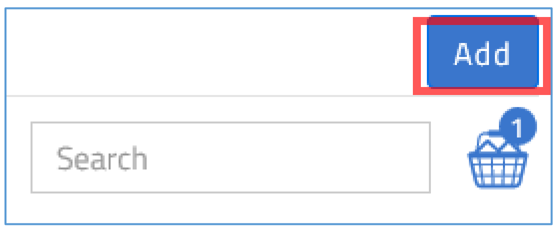
***Note* While in the Wizard you can also upload a photo of your listing by clicking the "Add Photo" icon on the upper left side of the page. This is only to display the photo in your transaction and WILL NOT upload the photo to the MLS.**

To Add Additional Forms to any EXISTING Transaction

***Note* To view all of your Transactions, click on the Transaction Desk (house) icon on the left side of the screen.**

1) To add forms to a Transaction, select the Transaction you need, then select the word “Forms” from the menu on the right side of the screen. Click “Add” at the top to get the available folders to select your form(s).

2) Once you have selected your desired form(s) and click “Add” in the upper right corner, you will be taken back to the list of forms on your Transaction.



To Add Forms by applying your template (previously known as Quick Start Group)

1) Access the desired transaction.
2) Click Forms in the menu in the right side column of the page.
3) Click the (Menu) icon in the upper right corner then select “Apply Template”.
4) Select your template then click Apply.

To View/Edit your Template(s)

1) Click the Settings icon on the far left side of the screen to view your options.
2) Select the "Transaction Templates" option. This is where you can make new templates or edit your existing templates.

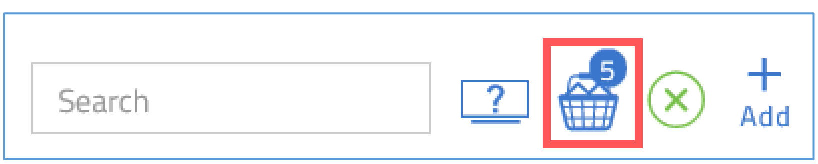
Note – You will only be able to edit your personal templates and not those that are created by your office and shared with you.

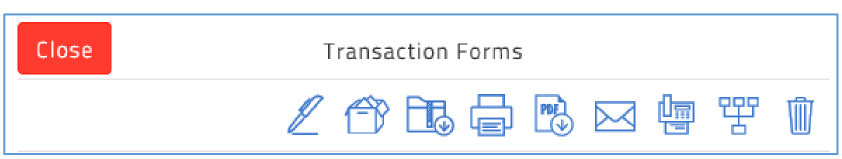
To Email, Print, Fax, etc. a SINGLE form

1) Open the desired transaction.
2) Select Forms from the menu in right-side column.
3) Click the form name to open the form.
4) Click the File menu at the top of the page and select Print or Send (to email or fax it).

To Email, Print, Fax etc. two or more forms

1) From the list of forms, select the form(s) by clicking on the circle to the right of the form or to select all of your form(s) click the circle at the top
2) After you have selected two or more forms, click on the basket icon to see your options then make your choice.





QUICK TIPS to start a Purchase Agreement using the Wizard

1) Search the address or MLS number of the property in RCO3®.
2) Click on the MLS number to open the listing details.
3) Click the **"Transaction"** link below the listing photo.

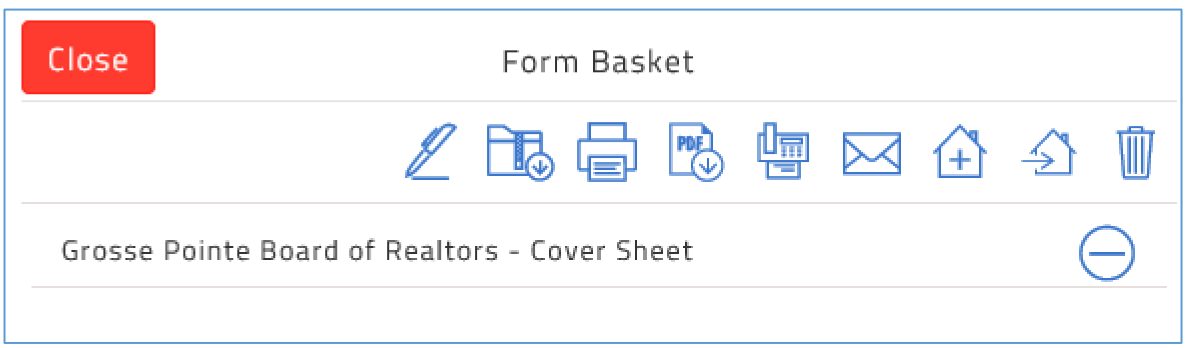
4) The **"Create Transaction"** box will open in Transaction Desk.
5) Select your Template from the dropdown menu i.e. Listing, Purchase (Only if you or your office have created templates)
6) Select Type indicating if the transaction is for a Lease, Listing or Sale/Purchase
7) Select where you wish to import data from for your transaction from "Realcomp MLS" or "Realcomp PRD".
   a. If you select Realcomp MLS, you will need to enter the property type and the MLS number.
   b. If you select Realcomp PRD, you will need to select the County and enter the property ID number.
8) Add your role by clicking the dropdown menu, i.e. Selling Agent. Then click **"Create"** in the upper right corner.
9) The wizard is now open. There are 5 Steps to the Wizard and you can complete each step as desired. To get to the next step click **"Next"** in the upper right corner.
10) Go to **Step 4** of the Wizard where you can add forms by clicking **"Add"** to the right of the **"Next"** button. You can choose from any of the available folders by clicking on the name next to the folder.
11) Click on the form(s) you would like to add to your transaction. After you have made your selection, click the **"Add"** button in the upper right corner.
12) You are now back on the Forms page of the wizard in your transaction.
13) You can now click on the Purchase Agreement form to fill it out.

How to Email, Print, Fax or Authentisign

1) Click the **"Go to Forms" or "Go to Documents"** link on the bottom left corner of the Dashboard widget. You will need to open the folder within which the document is stored.

2) Select the form(s)/document you wish to email, print, fax or sign. Once you have made your choice, you will notice a **"Basket"** on the upper right side with a number indicating the number of forms or documents you've selected.

3) Click on the **"Basket"** to see your options, and make your choice. Hovering your mouse pointer over each of the icons will tell you what that icon does.



Using Authentisign™ for Electronic Signatures in TransactionDesk

What is Authentisign™?

Authentisign™ is the electronic signature feature that is incorporated into TransactionDesk at NO EXTRA COST to you! It is ESIGN compliant and FHA approved.

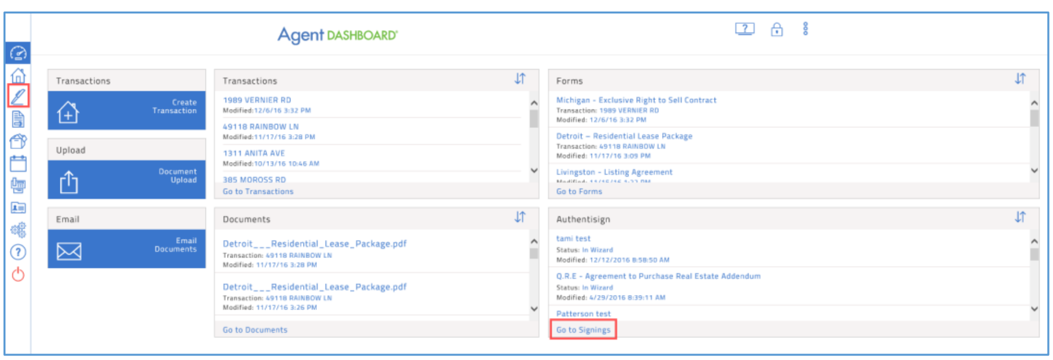
How Does It Work?

You can easily email forms in your TransactionDesk transactions or any other form that you have electronically or in paper form to your customers to have them electronically sign it when signing them in person is inconvenient.

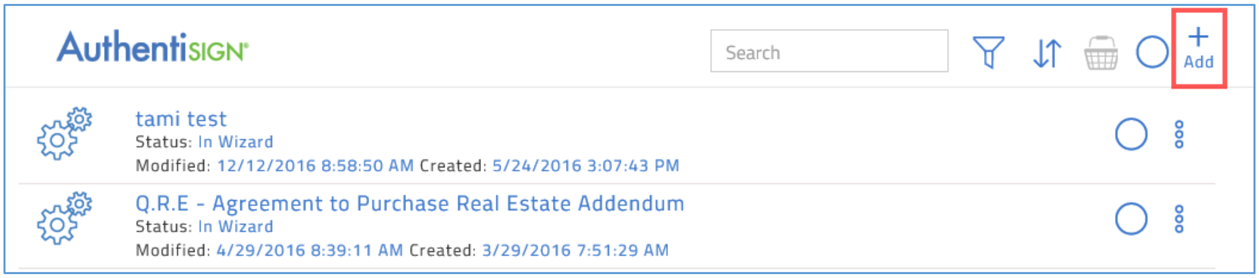
Signing a document that is a part of a transaction

The easiest way to set up an electronic signing is when the document and participants have already been set up in a transaction.

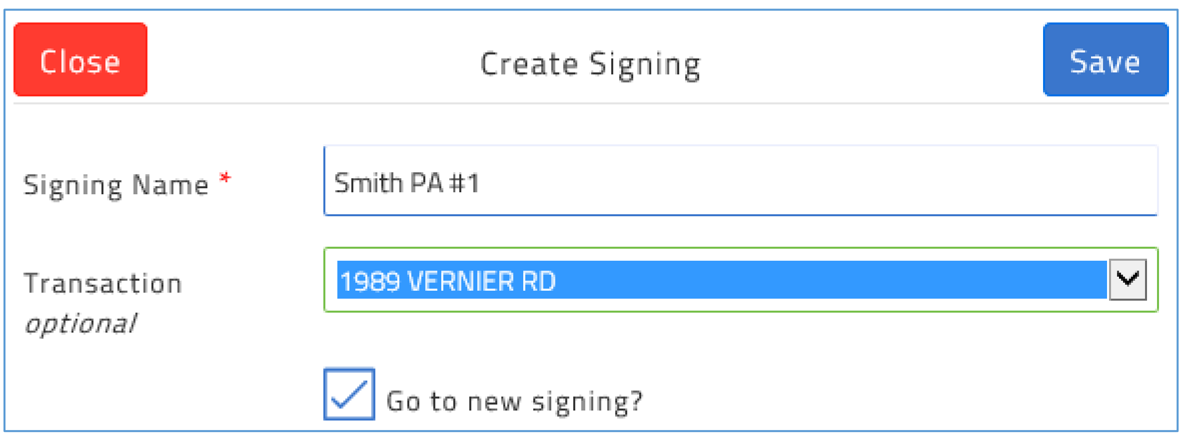
1. If you are displaying the Authentisign widget on your Dashboard, you can start a signing by clicking Go to Signings, if not, click the pen icon in the left-side navigation panel.



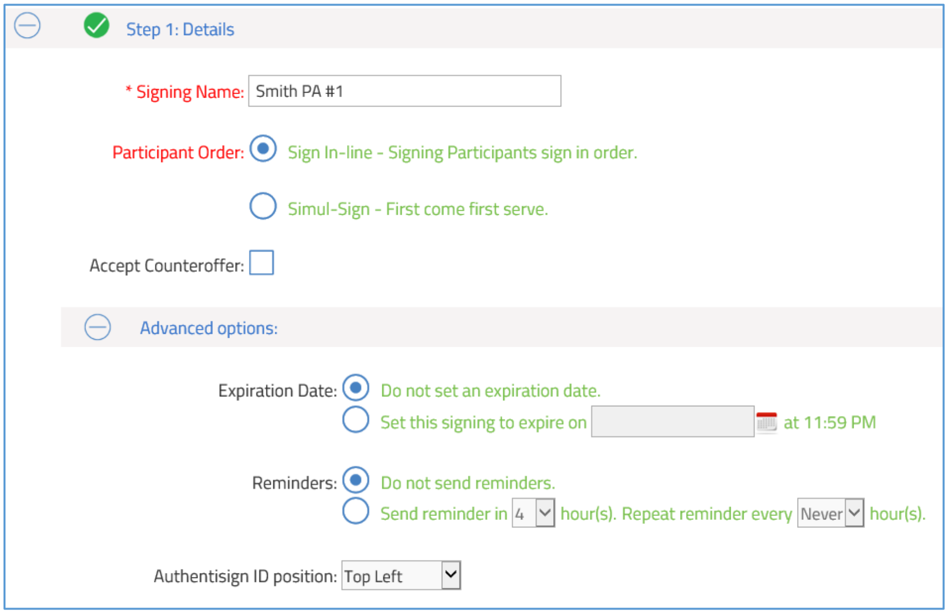
2. Click the “Add” icon at the top of the page.



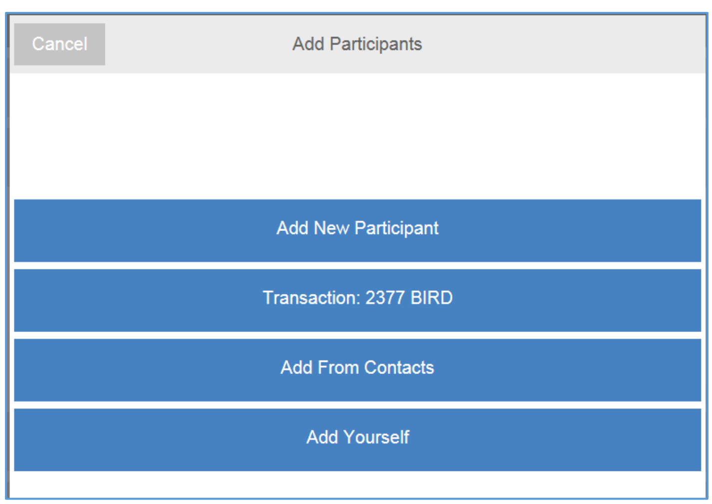
3. Give the signing a name and select the desired transaction name from the drop-down list. Click Save in the upper right corner. This starts the signing wizard.



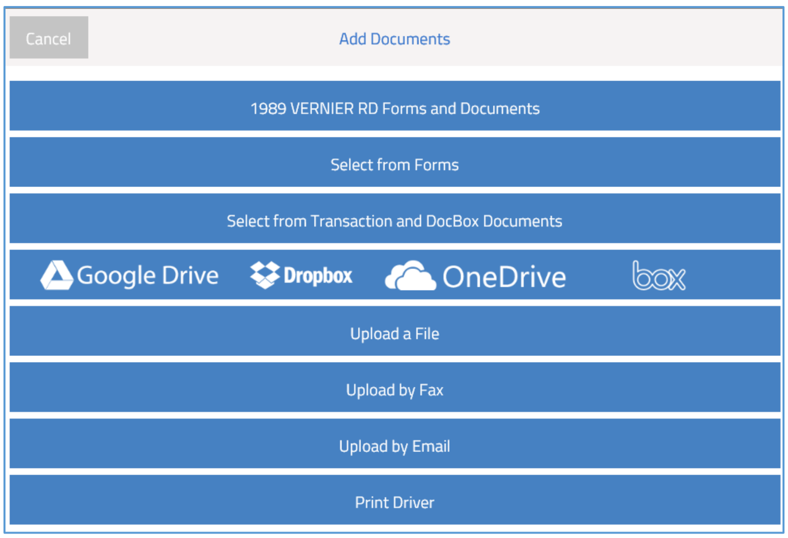
4. Step 1: Details
   In the details section you have Advanced options where you can:
   a. change the name of the signing
   b. select whether the participants sign in order or all at once,
   c. select whether the signing should allow counter-offers,
   d. set an expiration date for the signing, if desired
   e. set reminders if the participants have not completed their signing



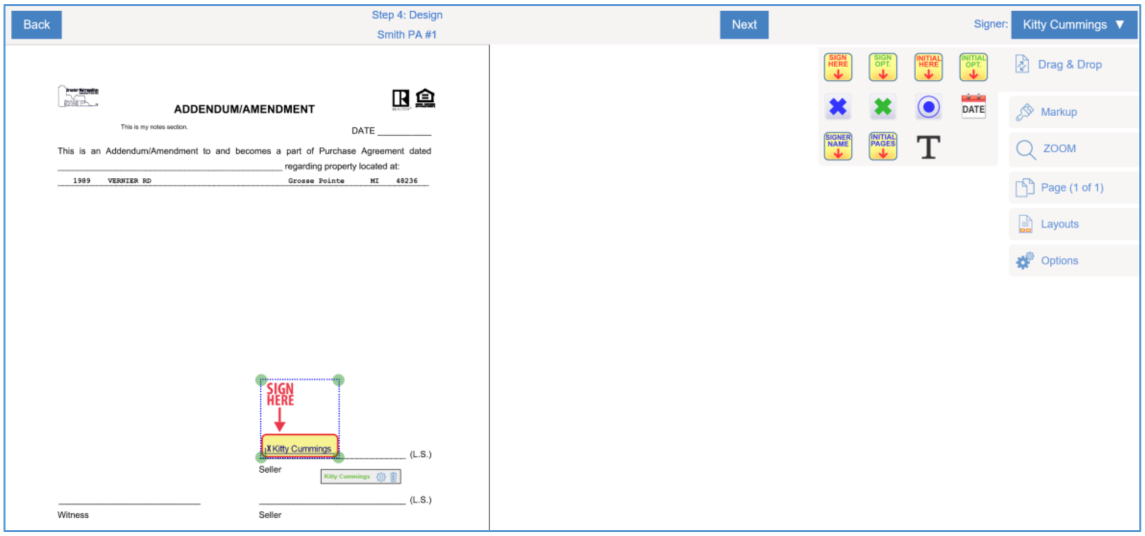
5. Step 2: Participants
   Clicking the plus sign and then clicking Add will cause a pop-up to appear to add a participant to the signing. You can add new participants, add someone that is already a part of the transactions, add someone from your TransactionDesk Contacts or add yourself. Select the desired add method and select the desired user. Click Add in the upper right corner to add them to the signing.



6. Step 3: Documents
   Clicking the plus sign to open the Documents section will launch a pop-up that contains all of the documents/forms currently attached to the transaction. If you don't want to add a document that is already in the transaction, cancel that pop-up and click Add to open a pop-up showing the many ways/sources that you can use to add documents to this signing. Place a check beside the documents that should be included in the signing. Click "Add Document(s)" when finished. Click the Next arrow when finished adding documents.

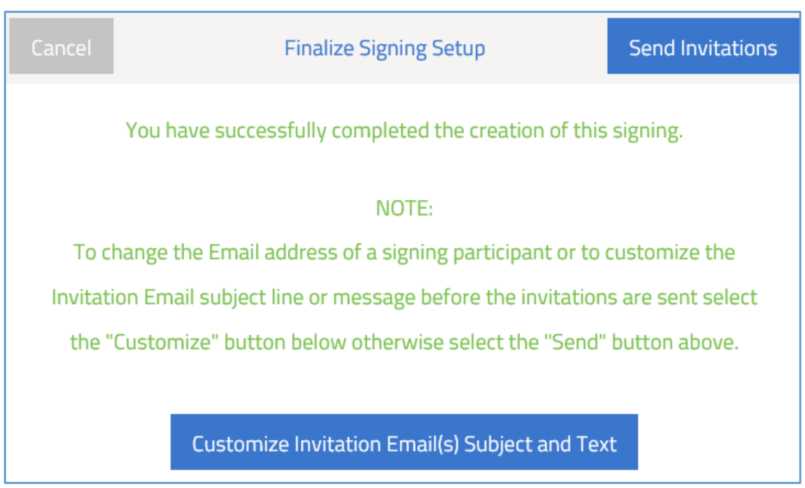


7. Step #4 – Design
   A window will appear with the selected document so that the signing blocks can be added to the form.
   - Select the person singing the form from the upper right side, if they are not already highlighted.
   - Click Drag and Drop to open the menu of signing block options.
   - Navigate to the part of the form that contains the line to be signed.
   - Drag and drop the desired signing block to the line to be signed.
   - Click the Next arrow when finished.



8. Step #5 – Review and Send

You are given the option to edit the email address or text of the email. To do this, click Customize Invitation at the bottom of the window. To go ahead and send the default message, click Send Invitations.



If you have additional questions, please contact Realcomp's Customer Care Department at (866) 553-3430

TRAINING NOTES