



# DocBox2Go

[www.docbox2go.com](http://www.docbox2go.com)

## User Guide





# **DocBox2Go**

## **User Guide**

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### Getting Started — Setting your password

- You will need to login to your DocBox/TransactionDesk account to set your DocBox2Go password.
- Login, click on the 'Settings' tab, 'My Preferences' and DocBox2Go Settings

1. The navigation bar at the top of the page contains several tabs: Broker Tools, Home, Settings, Calculator, Wizards, Help, Chat, and Logout. The 'Settings' tab is highlighted with a red dashed box.
2. The 'My Preferences' section is displayed. It contains three boxes: 'My Preferences', 'Quick Start Groups', and 'Clauses'. The 'My Preferences' box is highlighted with a red dashed box. It contains a checked checkbox and the text 'Use to select personal options to customize the site.' with a 'Continue' button below it.
3. The 'DocBox2Go Activation' settings page is shown. The left sidebar contains a list of 'Preference Options' including General Settings, User Information, Password Management, Transaction Settings, Task Settings, Appointment Settings, Email Signature, Form Settings, Document Settings, Faxing Settings, Contact Settings, Account Activity, Provider/Order Settings, Notification Settings, Print Driver Settings, DocBox2Go Settings, and TopProducer Settings. The 'DocBox2Go Settings' option is highlighted with a red dashed box. The main content area shows 'DocBox2Go Activation' with a checked checkbox 'Yes, I want to enable DocBox2Go.', fields for 'First Name: Joe' and 'Last Name: Kazzoun', and another checked checkbox 'Use the same password I'm already using to access my TransactionDesk account.' Below this is explanatory text and a 'Save' button.

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### **Getting Started — Setting your password**

- The box to enable DocBox2Go should already be checked. If not, click the check box to enable DocBox2Go.
- Take note of your first and last name as it is in our system. We know you know your own name. However, you may go by 'Joe' or 'Joseph', 'Beth' or 'Elizabeth'. You need to know how our system has you listed when you login to DocBox2Go.
- Most of you will want to use one password when logging into DocBox2Go and other remotely accessed DocBox/TransactionDesk features (e.g.—the DocBox print driver). If that is the case, make sure 'Use the same password I'm already using to access my TransactionDesk account.' is checked and then click on the 'click here' link in the sentence that says, "to manage your account password, click here..."
- Otherwise, uncheck the second checkbox and enter in a password.

#### **DocBox2Go Activation**

Yes, I want to enable DocBox2Go.

First Name: Joe

Last Name: Kazzoun

Use the same password I'm already using to access my TransactionDesk account.

To manage your account password, [click here](#) and you will be taken to the Password Management section of My Preferences.

For future reference you can navigate to your Password Management by clicking in the Settings tab at the top of the page, click on My Preferences on the left and again on Password Management, also on the left.

For more information on DocBox2Go, [click here](#).

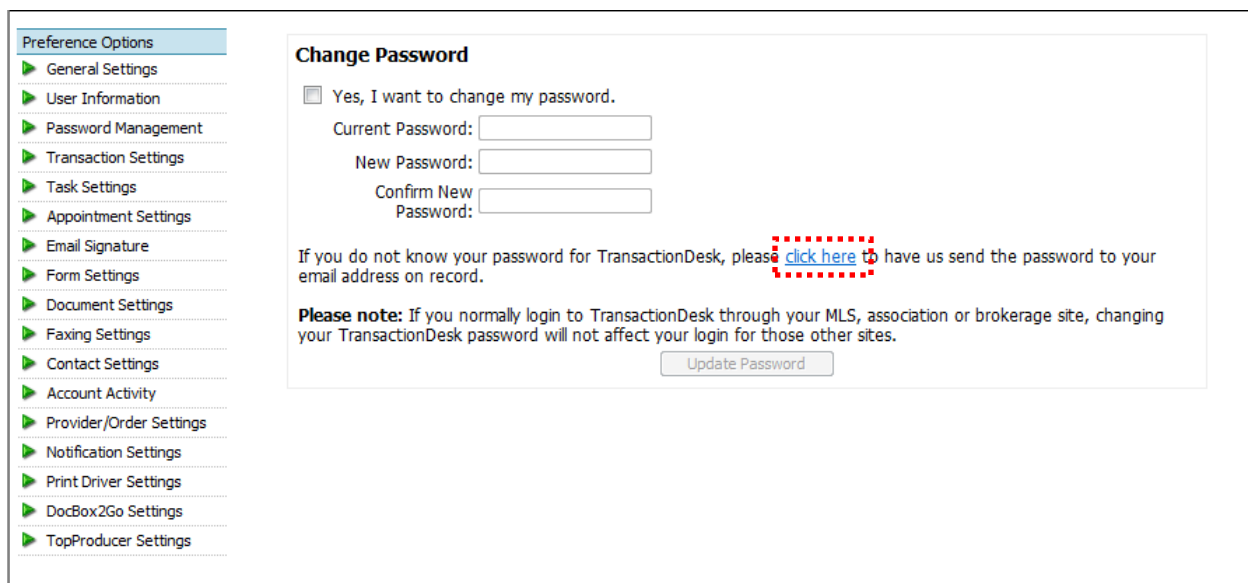
Save

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### Getting Started — Setting your password

- If you clicked on the link that says, "To manage your account password, click here..." you will be taken to the Password Management section of My Preferences, shown below.
- **Note:** Many of you login via your MLS, Association or brokerage website and do not know your password in our system. However, everyone has a password on our system.
- In order to get that password, click on the link outlined in red to have it emailed to you.
- Your password will be emailed to the email account on record in our system. You can double-check that email address by clicking on the 'User Information' link on the left side of the My Preferences screen, shown below.
- Once you have your password, enter it and then enter your new password.
- **Note:** Your DocBox/TransactionDesk password is not related to any other password. It can be the same or different than passwords you use for other systems such as your MLS, association site, brokerage site, etc.



Preference Options

- ▶ General Settings
- ▶ User Information
- ▶ Password Management
- ▶ Transaction Settings
- ▶ Task Settings
- ▶ Appointment Settings
- ▶ Email Signature
- ▶ Form Settings
- ▶ Document Settings
- ▶ Faxing Settings
- ▶ Contact Settings
- ▶ Account Activity
- ▶ Provider/Order Settings
- ▶ Notification Settings
- ▶ Print Driver Settings
- ▶ DocBox2Go Settings
- ▶ TopProducer Settings

### Change Password

Yes, I want to change my password.

Current Password:

New Password:

Confirm New Password:

If you do not know your password for TransactionDesk, please [click here](#) to have us send the password to your email address on record.

**Please note:** If you normally login to TransactionDesk through your MLS, association or brokerage site, changing your TransactionDesk password will not affect your login for those other sites.

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**DocBox2Go is accessed at [www.docbox2go.com](http://www.docbox2go.com).**

### **Authentication**

- Enter your login credentials to begin.
- You must enter your name as it is registered in DocBox/TransactionDesk
- Go to Settings> My Preferences> User Information in your main DocBox or TransactionDesk account if you are unsure.



### **Mobile DocBox Login**

\* First Name:

\* Last Name:

[Enable Text Password](#)

\* Password:

Login

[Forgot Password](#)

\* Required Fields.

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### **Main Page**

- Upon successful authentication, users are given three choices.
- 'Access My Inbox' and 'Access My Folders' are the same as your DocBox folders.
- 'Access My Transactions' will provide the user with a list of up to 25 of their Transactions.

**Note:** Transactions are ordered by the most recently modified.



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[Access My Inbox](#)

[Access My Transactions](#)

[Access My Folders](#)

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The three options below are available on each page throughout the mobile site.

The 'Home' link will return the user to the above mentioned page.

The 'FeedBack' link allows the user to provide us with valuable information regarding the mobile site.

The 'Logout' link allows the user to safely and securely end their viewing session.

[Home](#) | [FeedBack](#) | [Logout](#)

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# **DocBox2Go**

## **User Guide**

### **FeedBack**

- Enter your comments, suggestions or concerns.
- Click the 'Send' button.



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### **Feedback Form**

\* Please enter your feedback

\* Required Fields.

Send

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## **User Guide**

### **My Transactions**

- The 'My Transactions' page lists your top 25 most recently modified Transactions.
- The 'Search Transactions' feature allows you to find Transactions easily or older Transactions that may not appear in the list.
- Click the Transaction name link to access the Transaction information.

**Note:** Enter a partial or whole Transaction name then click the 'Search' button.



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### **My Transactions**

[61804 Oxford St.](#)  
[3478 Wellington Rd](#)  
[123 Main Street](#)

Search Transactions:

Search

---

After clicking a Transaction Name link, users are able to view their Forms, Documents, and Contacts for that Transaction.



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[Back](#)

[View Documents](#)

[View Contacts](#)

[View Forms](#)

**Test Authentisign - Empty**

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## **User Guide**

### **Transaction Contacts**

- Click the Transaction Contact name link to access the Contact information.



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[My Transactions](#)

**My Contacts for Transaction: [123 Main Street](#)**

#### **Contacts**

[ABC Realty](#)

[Lance Campbell](#)

### **Contact Details**

The Phone, Cell, and Secondary Phone numbers provide the user with a one click option to automatically dial the contact.



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[Back](#)

**Contact Information for Transaction: [123 Main Street](#)**

#### **Company:**

**Name:** Lance Campbell

**Address:** 123 Main St., Miami, FL, 91548

**Phone:** 1-216-432-9115

**Fax:** (216) 432-6515

**Cell:** 000-000-0000

**Pager:**

**Secondary Phone:** 000-000-0000

**Email:** [lance@instanetforms.com](mailto:lance@instanetforms.com)

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### Transaction Documents

- Click the Document name link to view the Document.
- For Faxing and Email first check the corresponding checkbox then select the Email or Fax Selected Document option from the drop down menu.
- Click the 'Go' button



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[My Transactions](#)

My Documents for Transaction : [123 Main Street](#)

I would like to

Email Selected Document(s)

#### Documents

-  [Fax-Back Cover Sheet.pdf](#)
  -  [Escrow Deposit Receipt Verification \(EDRV-1\).pdf](#)
  -  [Monthly Reconciliation Statement \(MSR-5\).pdf](#)
-

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### Transaction Documents - Email

- Enter the recipient's name and email address.
- Add a message.
- Default is to include a Fax-Back Cover Sheet.
- Click the "Send" button.



---

The following Document (s) have been selected to be Emailed:  
Escrow Deposit Receipt Verification (EDRV-1).pdf, Monthly Reconciliation Statement (MSR-5).pdf  
for  
123 Main Street

Recipient Name :

To email multiple people and addresses, separate names and email addresses using commas.

\* Required Fields

Email Address :\*

CC :

BCC :

Message

Include Faxback Cover Sheet

Send

Cancel



The user will receive confirmation for the status of the email.

---

**Email successfully sent.**

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# DocBox2Go

## User Guide

### Transaction Documents - Fax

- Enter the appropriate information.
- Default is to include a Fax-Back Cover Sheet.
- Click the "Send" button.



---

The following Document(s) have been selected to be Faxed:  
Escrow Deposit Receipt Verification (EDRV-1).pdf, Monthly Reconciliation Statement (MSR-5).pdf for 12:

Recipient Name :  
\_\_\_\_\_

\* Fax# :  
\_\_\_\_\_

Note : To fax to multiple people and numbers, separate names and numbers using commas.  
\* Required Fields.

Fax Cover Message  
\_\_\_\_\_

Include Faxback Cover Sheet

---



The user will receive confirmation for the status of the fax.

**Fax successfully sent.**

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## User Guide

### Transaction Forms

- Click the Form name link to view the Form. (Forms are not editable)
- For Faxing and Email first check the corresponding checkbox then select the Email or Fax Selected Form option from the drop down menu.
- Click the 'Go' button





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[My Transactions](#)

**My Forms for Transaction: [123 Main Street](#)**

I would like to

#### Forms

-  [Escrow Deposit Receipt Verification \(EDRV-1\).pdf](#)
  -  [Monthly Reconciliation Statement \(MSR-5\).pdf](#)
-

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## User Guide

### Transaction Forms - Email

- Enter the recipient's name and email address.
- Add a message.
- Default is to include a Fax-Back Cover Sheet.
- Click the "Send" button.



---

The following Form (s) have been selected to be Emailed:  
Escrow Deposit Receipt Verification (EDRV-1).pdf, Monthly Reconciliation Statement  
for  
123 Main Street

Recipient Name :

To email multiple people and addresses, separate names and email addresses using commas.

\* Required Fields

Email Address :\*

CC :

BCC :

Message

Include Faxback Cover Sheet

Send

Cancel



The user will receive confirmation for the status of the email.

---

**Email successfully sent.**

---

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### **Transaction Forms - Fax**

- Enter the appropriate information.
- Default is to include a Fax-Back Cover Sheet.
- Click the "Send" button.



---

The following Form(s) have been selected to be Faxed:  
Escrow Deposit Receipt Verification (EDRV-1).pdf, Monthly Reconciliation Statement (MSR-5).pdf for 123

Recipient Name :

\* Fax# :

Note : To fax to multiple people and numbers, separate names and numbers using commas.  
\* Required Fields.

Fax Cover Message

Include Faxback Cover Sheet



The user will receive confirmation for the status of the fax.

**Fax successfully sent.**

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### Documents - Inbox

This section displays all your documents in your DocBox 'Inbox'

- Click the Document name link to view the Document.
- For Faxing and Email first check the corresponding checkbox then select the Email or Fax Selected Document option from the drop down menu.
- Click the 'Go' button



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[My Transactions](#)

**My Inbox**

I would like to

#### Documents

 [Century 21 Sunshine Realty - Administrative Sales Information Sheet.pdf](#)

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### Documents - My Documents

This section displays all your documents and folders in your DocBox 'My Folders'

- Click the Document name link to view the Document.
- For Faxing and Email first check the corresponding checkbox then select the Email or Fax Selected Document option from the drop down menu.
- Click the 'Go' button
- The 'Search Folders' feature allows you to find Documents easily or older Documents that may not appear in the list.

**Note:** Enter a partial or whole Document name then click the 'Search' button.



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### My Folders

Email Selected Document(s)

[Current - 2009](#)

[Up one level](#)

[Miami](#)

[Miami Dade](#)

Search Folders:

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### Documents - Email

- Enter the recipient's name and email address.
- Add a message.
- Default is to include a Fax-Back Cover Sheet.
- Click the "Send" button.



---

The following Document (s) have been selected to be Emailed  
Century 21 Sunshine Realty - Administrative Sales Information She

Recipient Name :

To email multiple people and addresses, separate names and email addresses using commas.

\* Required Fields

Email Address :\*

CC :

BCC :

Message

Include Faxback Cover Sheet

Send

Cancel



The user will receive confirmation for the status of the email.

---

**Email successfully sent.**

---

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## **User Guide**

### **Documents - Fax**

- Enter the appropriate information.
- Default is to include a Fax-Back Cover Sheet.
- Click the "Send" button.



---

The following Document(s) have been selected to be Faxed:  
Century 21 Sunshine Realty - Administrative Sales Information Sheet.

Recipient Name :

\* Fax# :

Note : To fax to multiple people and numbers, separate names and numbers using commas.

\* Required Fields.

Fax Cover Message

Include Faxback Cover Sheet

Send

Cancel



The user will receive confirmation for the status of the fax.

---

**Fax successfully sent.**

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