



**Transaction**  
**Desk**

**DocBox**

**Instanet**  
**Forms**

**Authentisign**

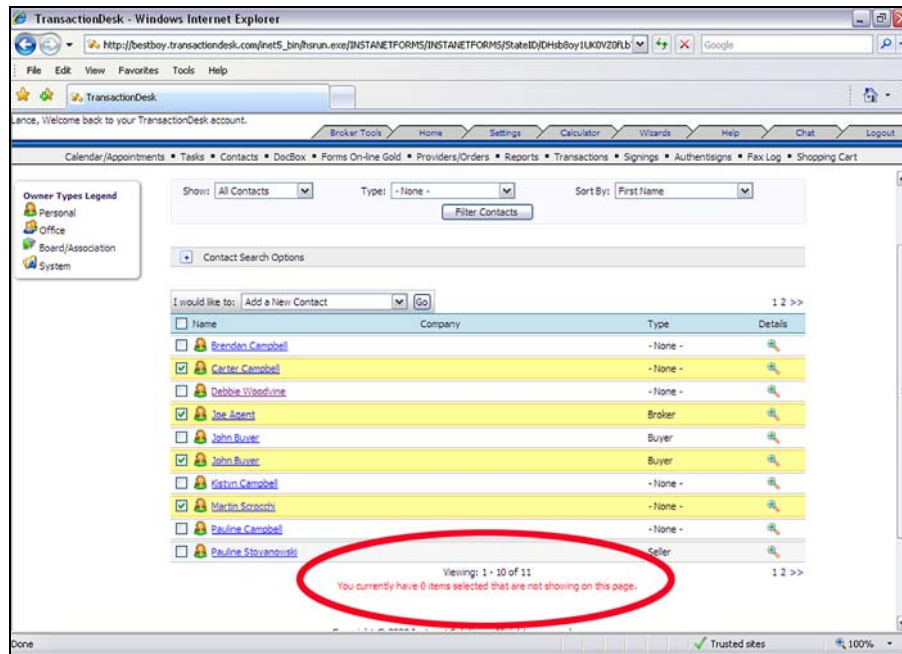
**InstanetFax**

**Need help?**

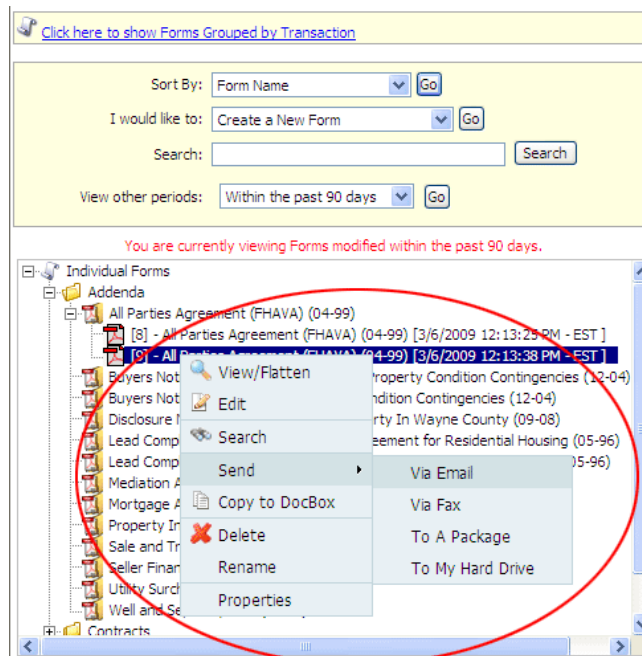
Please call the Help Desk at 519-432-9115

Email: [support@instanetsolutions.com](mailto:support@instanetsolutions.com)

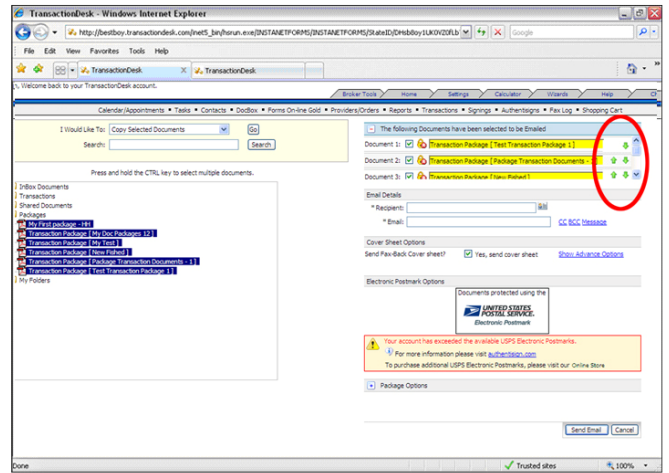
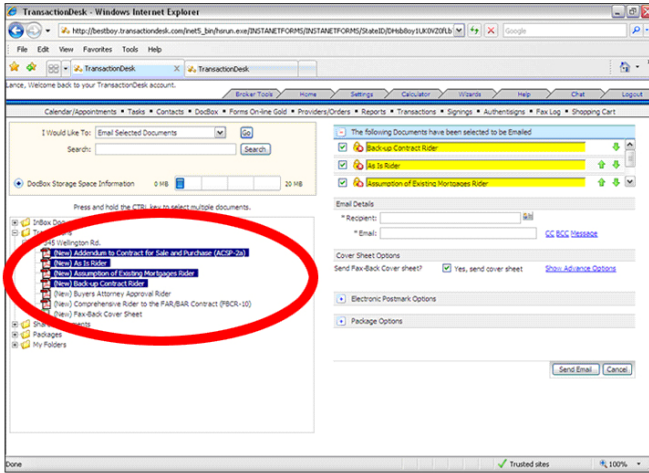
**Paging changes:** The pagination function, for lists in various areas of the system, now 'remembers' selected items from previous pages. By default, the system displays 10 items per page. If the user selects items on the first page and navigates to another page for further selection, a message at the bottom of the screen will tell the user how many items have been selected on other pages.



**Form right-click menu:** A 'right-click' menu has been added to the InstanetForms section.

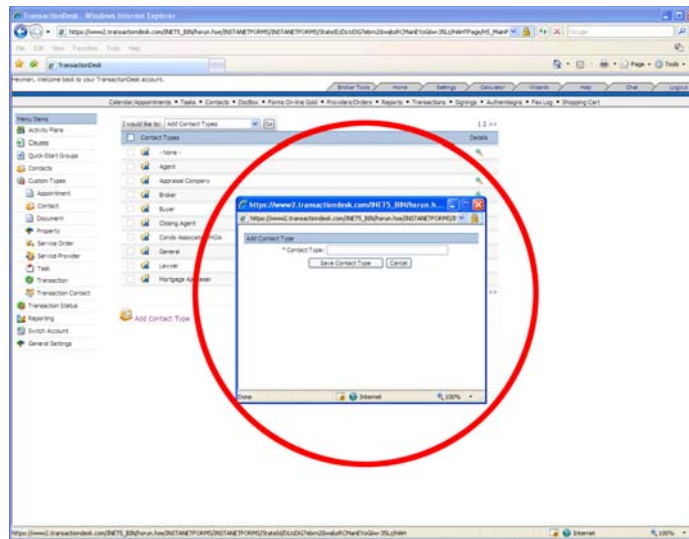


**Changing the order of outbound documents:** When forms or documents are emailed or faxed, the order in which they are sent/attached can now be changed. Simply, click on the arrows above or below to move a document to a new location.



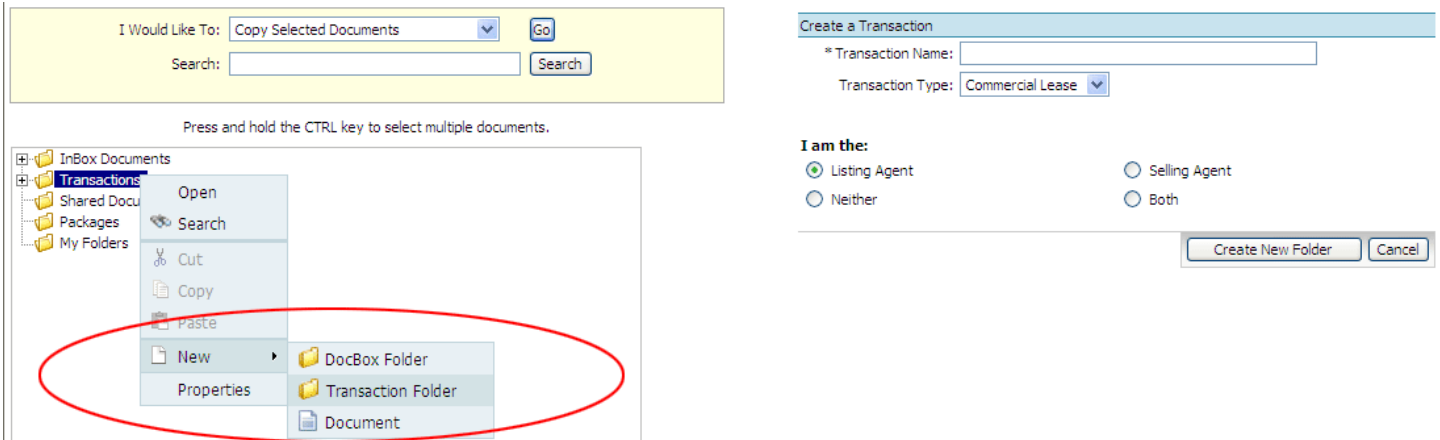
Shows selected documents after changing the order (Moved 1<sup>st</sup> document to the 3<sup>rd</sup> position 'Back-up Contract Rider')

**Custom types in broker tools:** Super-users can define new system types within Broker Tools that will be available to all their agents.



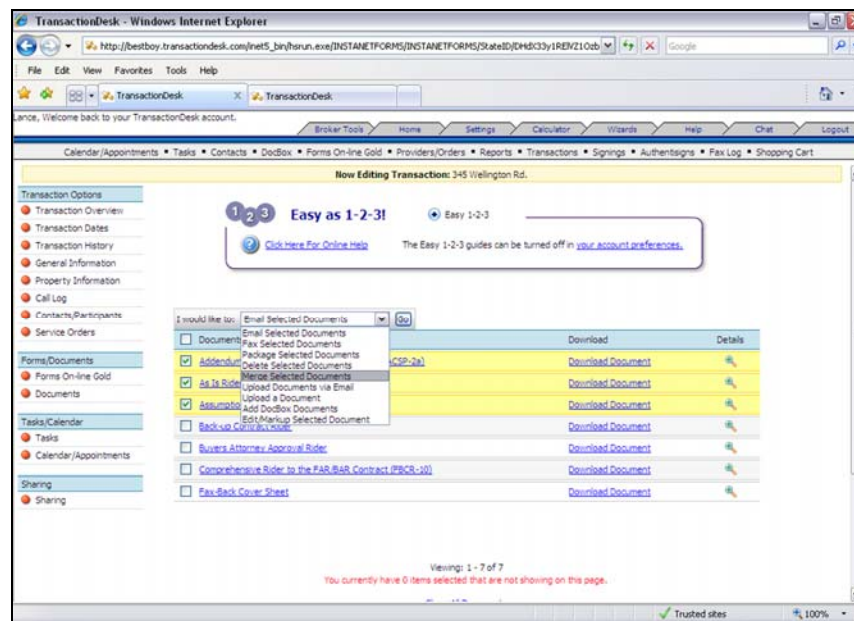
Pop up window to allow super-users to create a new 'Custom Type'

**Transactions Can Now be Created in DocBox:** New options for creating a quick transaction and opening the Transaction overview page have been added to DocBox.



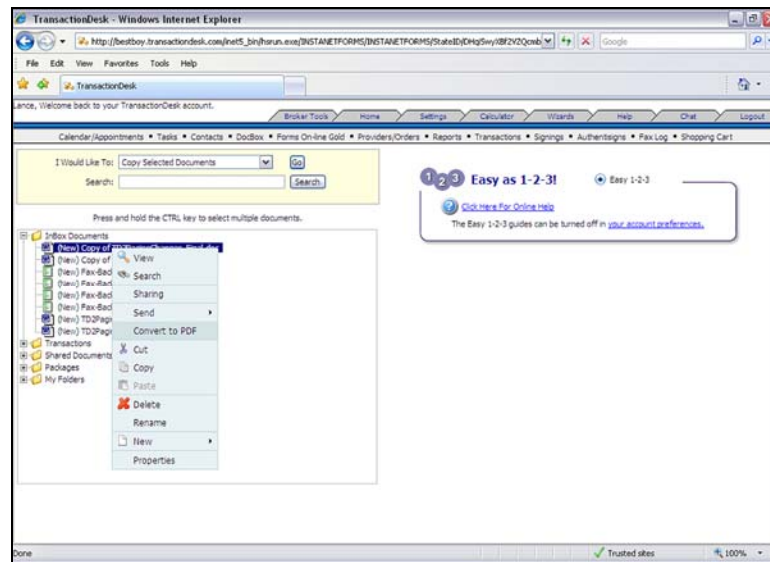
'Right-Click' pop-up menu.

**Merging transaction documents:** The ability to merge transaction documents from the Transaction Documents page has been added. Select the documents you would like to merge, click 'Merge Selected Documents' from the drop-down menu and click 'Go.'



This shows the 'Merge Selected Documents' menu option.

**Convert to PDF:** Users can now convert all non-PDF DocBox documents (e.g. Word, Excel, Images) to PDF by right-clicking on the document and selecting “Convert to PDF”. This option is also available in the document details pages via the “I would like to” menu.



'Right-Click' pop-up menu with 'Convert to PDF' option.

**E-mail to fax:** DocBox users who have unlimited faxing can now use “email to fax” functionality by sending an e-mail to [email2fax@transactiondesk.com](mailto:email2fax@transactiondesk.com), entering the fax number in the subject and attaching the files for faxing.

**Paperless link:** The system will now count the number of pages you send through “paperless” methods (i.e. fax pages/email attachments) and display those stats – in real time - on a page that is accessible by a link on all outbound e-mails and the external login pages for participants and signers.





**Thank you for using Instanet Solutions' service.**