



TRANSACTIONDESK™

TRANSACTION MANAGEMENT MANUAL

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Transaction Desk Transaction Management Manual

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Transaction Desk Access and Set Up

Transaction Desk can be accessed through the Agent menu on Realcomp *Online*[®].

Simply click the **Transaction Desk - Forms** option in the menu and another window will open taking you directly to the transaction management system.

Since you have already logged into Realcomp *Online*[®], there is no need to login to Transaction Desk. The system will automatically recognize who you are and give you access to the appropriate forms.

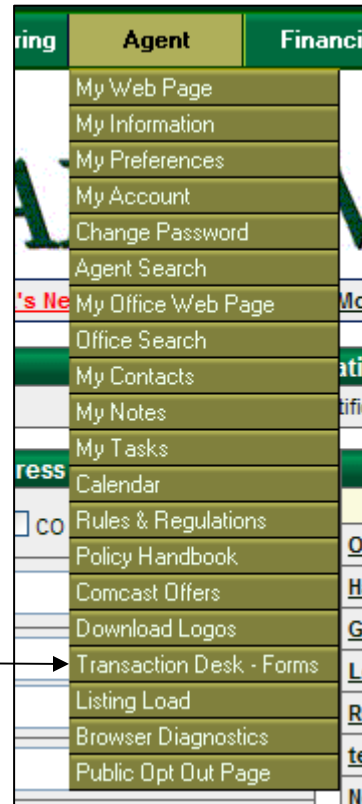


Figure 1

Before using the system for the first time, you should run the Preflight System Check. If it is not launched automatically at the time of the first login then you can access it by selecting the **Settings** tab at the top of the page (Figure 2) and click **Continue** in the box that says **Preflight System Check** (Figure 3).

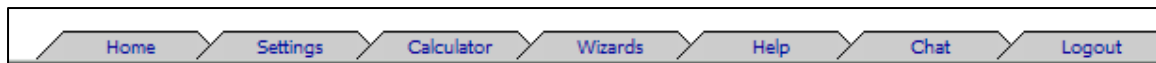


Figure 2

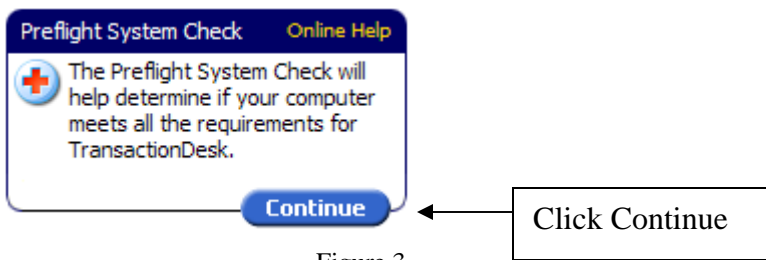
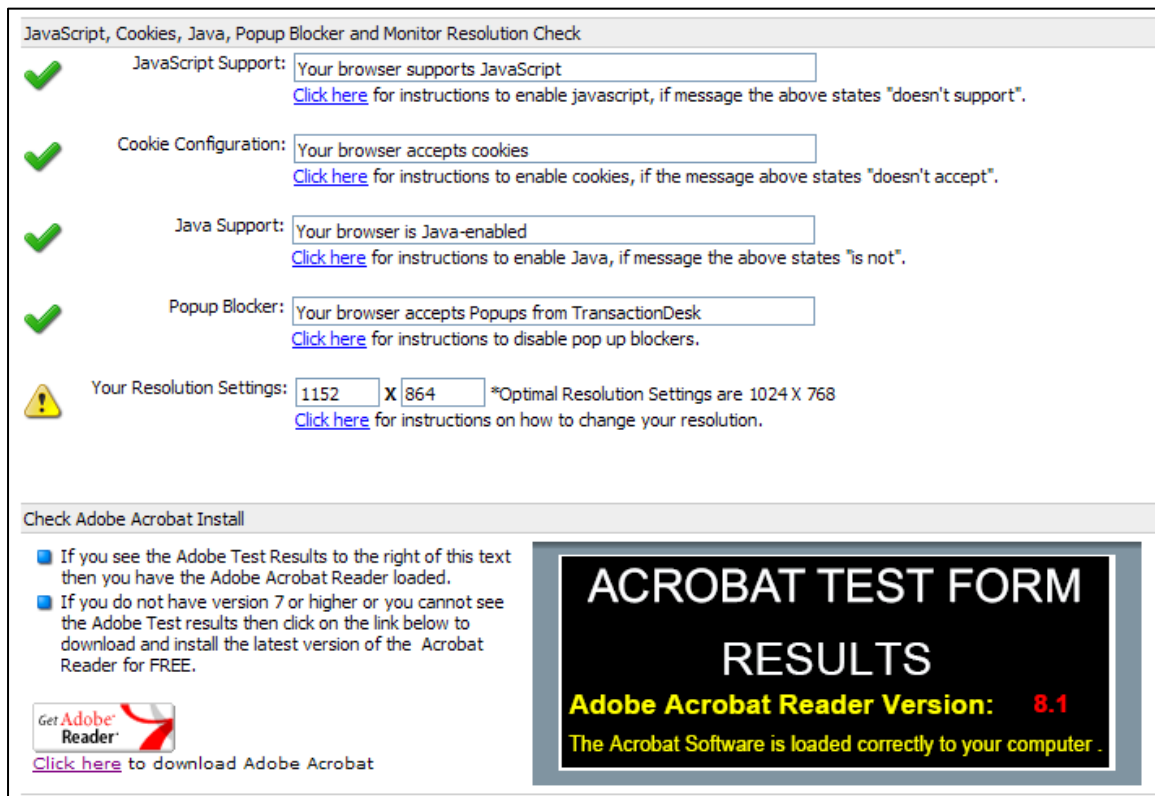


Figure 3

Once you select this option a new page will appear and six tests will be conducted automatically to be sure that your Internet Explorer settings are correct for using Instant Forms. Your browser **MUST** be configured to support Javascript, accept cookies, have a current version of Adobe Acrobat, run Java Applets, and allow pop-ups. There is also a recommended screen resolution but this is just a guideline and not a requirement.

As the system completes these checks, those items that pass will have green checks to the left of the item. Those items that do not pass will have a red X and will let you know how to correct them. The screen will start with each item having a red X and are complete when all of the items have been addressed and something appears in the Adobe Acrobat test box toward the bottom of the page (Figure 4).




JavaScript, Cookies, Java, Popup Blocker and Monitor Resolution Check

- JavaScript Support:
[Click here](#) for instructions to enable javascript, if message the above states "doesn't support".
- Cookie Configuration:
[Click here](#) for instructions to enable cookies, if the message above states "doesn't accept".
- Java Support:
[Click here](#) for instructions to enable Java, if message the above states "is not".
- Popup Blocker:
[Click here](#) for instructions to disable pop up blockers.
- Your Resolution Settings: X *Optimal Resolution Settings are 1024 X 768
[Click here](#) for instructions on how to change your resolution.

Check Adobe Acrobat Install

- If you see the Adobe Test Results to the right of this text then you have the Adobe Acrobat Reader loaded.
- If you do not have version 7 or higher or you cannot see the Adobe Test results then click on the link below to download and install the latest version of the Acrobat Reader for FREE.


[Click here](#) to download Adobe Acrobat

ACROBAT TEST FORM RESULTS

Adobe Acrobat Reader Version: 8.1
The Acrobat Software is loaded correctly to your computer.

Figure 4

When all tests are complete and all failed items have been resolved, you can click on **Settings** and **My Preferences** to do some additional selections, **Settings** and **Quick Start Groups** to group forms together into packages for future use or click the **Home** tab at the top of the page to return to the homepage to get started.

Setting Up Quick Start Groups

Quick start groups allow you to group forms together to help save time when adding these forms to a transaction. The Quick-Start groups are designed to allow you to insert multiple forms into a transaction with one click, instead of adding the same individual forms to many transactions. A '**Quick-Start Group**' is a customizable group of forms selected from any of your available **Forms**.

Once created, your Quick-Start groups are visible in locations where you will add Forms into a transaction. You can then add all forms in the Quick-Start group by choosing it from the available Quick Start Groups, just as you would choose a new form to add from the available forms.

To begin a Quick Start Group, click the **Settings** tab at the top of the page and click **Continue** in the Quick Start Groups box.

The list of Quick Start Groups to which you currently have access will display. To the left of the Quick Start Group name is an icon that indicates where the group originated and who has access to it. See below for the key to the icons.

In the **“I would like to:”** field, select **“Create a New Quick-Start Group”** and click **Go** to begin.

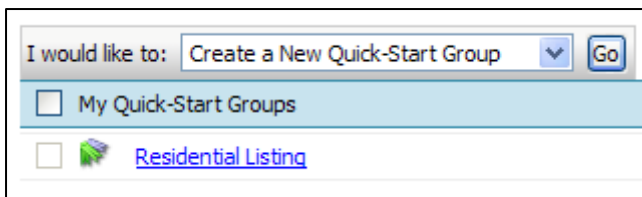
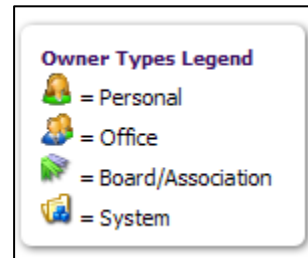


Figure 5



Next give the group a name, such as **“Residential Listing packet”** (Figure 6). Enter a description of the Quick Start Group, if desired. If you would like to have this group automatically added to any transaction of a given Transaction Type, check the given box and select the associated Transaction Type. For example, if this is a Residential Listing Quick Start Group and you would like it to automatically be added to all listings, then check the box to have it automatically added and select **“Listing”** from the Transaction Type field. Default transaction types are Listing, Purchase/Sale and Lease but custom transaction types can be added also. If you have not added the desired Transaction Type to your list yet, you can do so by clicking **Add Transaction Type**. Click **Save Quick Start Group** when finished.

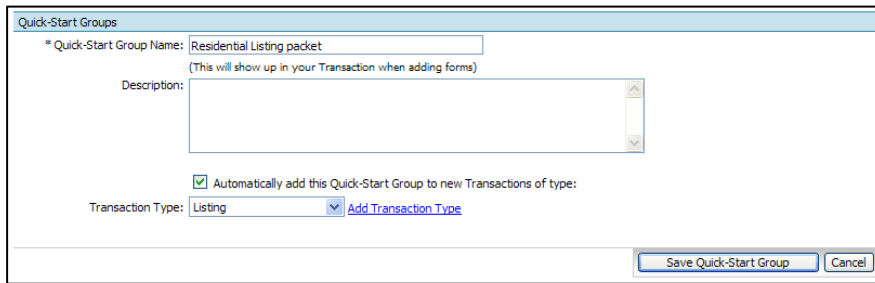


Figure 6

The next screen in the wizard allows you to select the forms that you would like to include in the Quick Start Group (Figure 7). Click on the plus sign next to each group of forms to expand the list of forms that are contained within that group. Click on the first form that you want to add, such as MAR’s Exclusive Right to Sell Contract and click **Add Selected Forms** to move it to the box on the right. Do this for each form that you want to include in your Quick Start group or hold the Control key (Ctrl) to select multiple forms and move them all at once when **Add Selected Forms** is clicked. If you added any that you later want to remove, click to check the checkbox to the left of the form name in the box on the right and click **Go** next to “Delete Selected Items” in the “**I would like to:**” field. Click the **Save Quick Start Group** button at the bottom when finished.

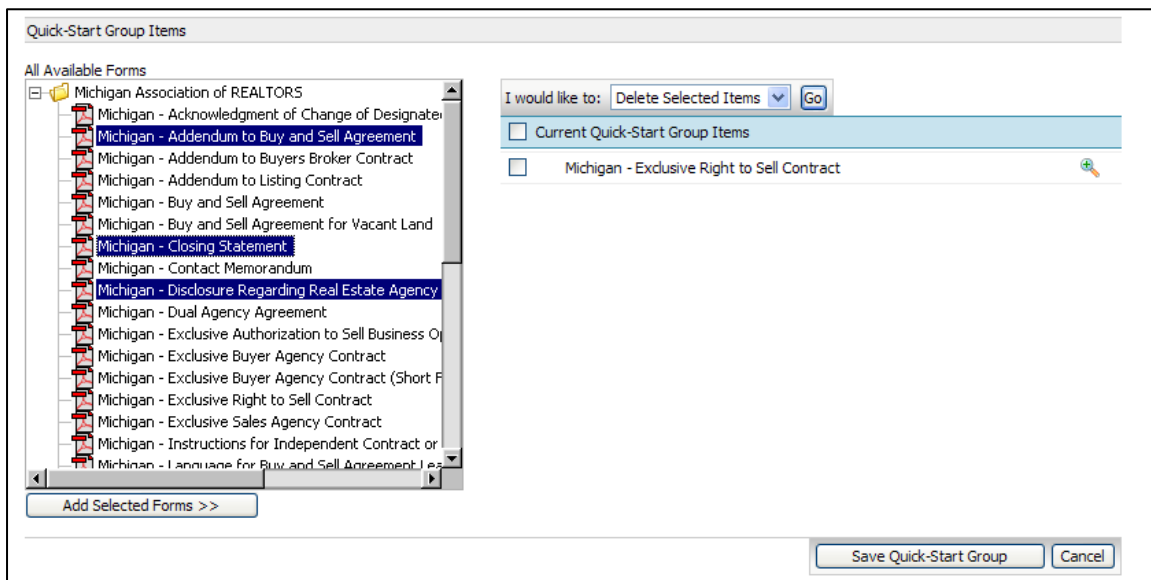


Figure 7

Using the Transaction Wizard to Start a New Transaction

To begin a new transaction, click **Start a new Transaction** on the forms homepage.

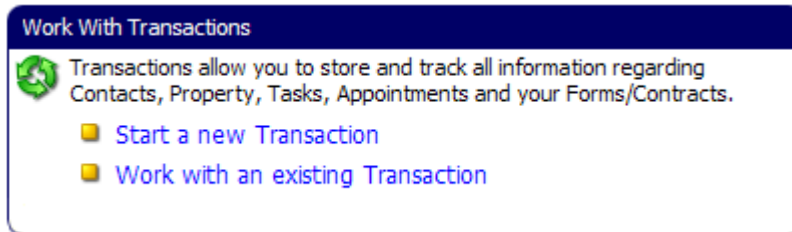


Figure 8

Step 1 - Transaction Wizard Options/General Information

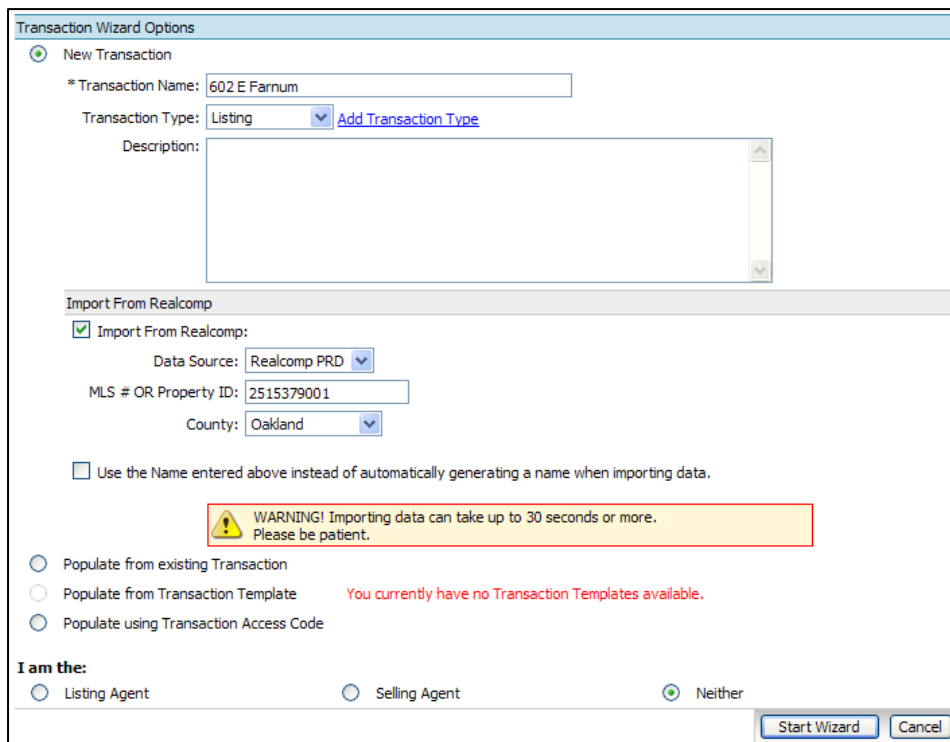


Figure 9

On the Transaction Wizard Options page, you can give the transaction a name, select the transaction type and enter a description, if desired. After this basic information has been added, select how the information should be populated into the transaction, if any. Some transactions may be completely new and then none of the options would be selected. If, however, the address is in Realcomp's Public Records, the listing is in the MLS already or you have a previous transaction for this property, you can prefill that data into this transaction. In the example above we are pulling the information in from a PRD record. To do this you must check the box to Import From Realcomp, select Realcomp PRD from the Data Source drop down list, enter the PIN number and select the appropriate county. If you have given the transaction a name and would like to use this name instead of the

address, then check the box that says “*Use the Name entered above instead...*”. If this box is not checked then the system will use the address of the property as the name of the transaction. Finally, select your role in this transaction (Listing Agent, Selling Agent or Neither). Click **Start Wizard** when this page is complete.

Step 2: Property Information

The second step in the wizard is the Property Information. Fill out any information that you have and leave any fields that do not apply blank. If you prefilled from an MLS listing or from public records, fill in any additional information and click **Next** when finished with this page.

Current Step:
Step 2: Property Information

Property Information:

MLS Number:	<input type="text"/>	Address:	<input type="text" value="602"/>	<input type="text" value="FARNUM"/>
Township:	<input type="text" value="ROYAL OAK"/>	County:	<input type="text" value="Oakland"/>	
City:	<input type="text" value="ROYAL OAK"/>	State:	<input type="text" value="MI"/>	
Zip Code:	<input type="text" value="48067"/>	Tax Number:	<input type="text" value="2515379001"/>	
Year Built:	<input type="text" value="1924"/>	Lot Number:	<input type="text"/>	
Unit Number:	<input type="text"/>	Block:	<input type="text"/>	
Subdivision:	<input type="text" value="FRANK W SIMON SUB"/>	Plat Book:	<input type="text"/>	
Page Number:	<input type="text"/>	School District:	<input type="text" value="ROYAL OAK"/>	
Zoning Class:	<input type="text"/>			
Property Type:	<input type="text" value="- None -"/>	Add Property Type		
Legal Description:	<input type="text" value="T1N, R11E, SEC 15 FRANK W SIMON SUB LOT 1"/>			

Figure 10

Step 3: Transaction Dates

The third step in the wizard is Transaction Dates. Fill in any dates that you have currently. If this is a new listing, then you may only have the List Date and Expiration Date. You will be able to come back into the transaction at a later date to add the other dates as you have them. Click **Next** when finished with this page.

Current Step:
Step 3: Transaction Dates

Transaction Dates

List Date: 03/02/2007
Closing Date: mm/dd/yyyy
Offer Date: mm/dd/yyyy
Offer Expiration Date: mm/dd/yyyy
Possession Date: mm/dd/yyyy
Additional Deposit Date: mm/dd/yyyy

Expiration Date: mm/dd/yyyy
Acceptance Date: mm/dd/yyyy
Offer Expiration Time: 12 AM :00
Funding Date: mm/dd/yyyy

Mortgage Dates

Application Date: mm/dd/yyyy
Approval Date: mm/dd/yyyy

Figure 11

Navigation within the Wizard:

To the left of the wizard screens there is a navigation bar that allows you to go back to a previous page within the wizard. You can only jump backward or forward to pages that you have already encountered in the wizard. See Figure 12.

Step 1: General Information
Step 2: Property Information
Step 3: Transaction Dates
Step 4: Contacts
Step 5: Forms/Contracts
Step 6: Working With Others
Step 7: Transaction Overview

Save & Exit

Key:

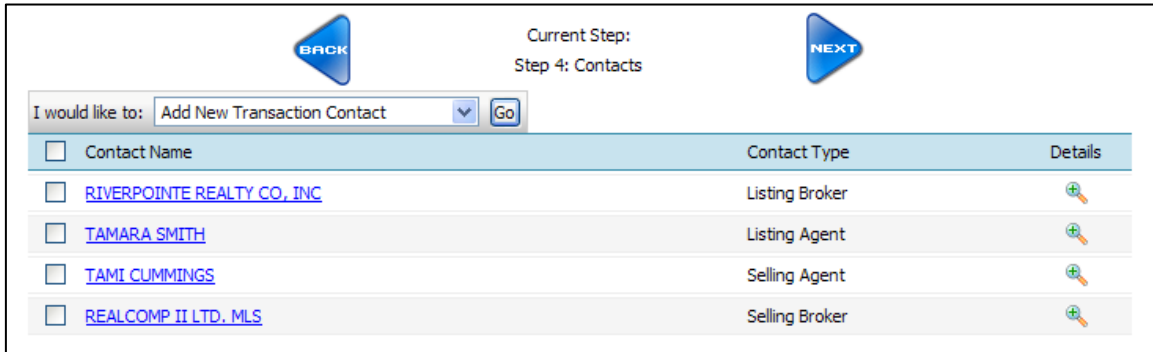
- ✔ - Completed step
- ▶ - Page you are currently viewing
- - Page you have viewed but not completed

Figure 12

Step 4: Contacts/Participants

The fourth step in the wizard is the Contacts/Participants. By default the Listing Agent and Listing Office are added as participants. If you have indicated that you are the buyer's agent, then you and your office will be indicated as representing the buyer's side of the transaction.

To add other participants, such as the seller, click **Go** to the right of **I would like to: Add New Transaction Contact**. (Figure 13)



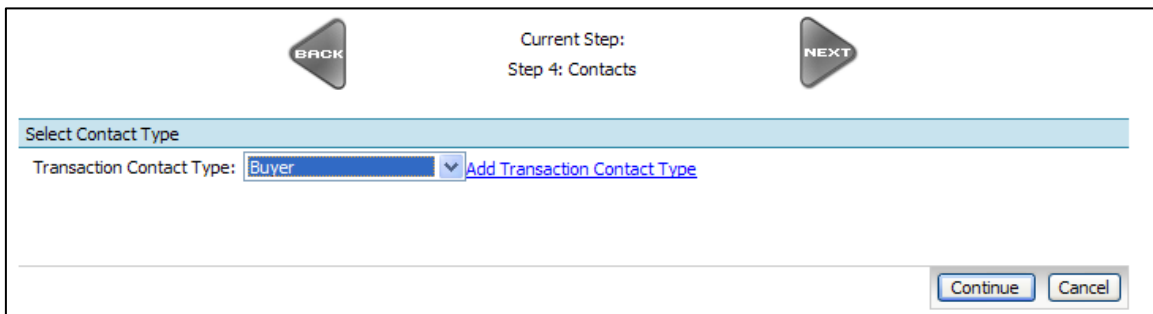
Current Step:
Step 4: Contacts

I would like to: [Add New Transaction Contact](#) **Go**

<input type="checkbox"/> Contact Name	Contact Type	Details
<input type="checkbox"/> RIVERPOINTE REALTY CO, INC	Listing Broker	
<input type="checkbox"/> TAMARA SMITH	Listing Agent	
<input type="checkbox"/> TAMI CUMMINGS	Selling Agent	
<input type="checkbox"/> REALCOMP II LTD. MLS	Selling Broker	

Figure13

Select the Contact Type from the drop down list and click **Continue**. If the desired Contact Type is not in the list, click **Add Transaction Contact Type** to add the custom type. (Figure 14)



Current Step:
Step 4: Contacts

Select Contact Type

Transaction Contact Type: [Buyer](#) [Add Transaction Contact Type](#)

Continue **Cancel**

Figure 14

If you have already entered this person into your Contacts within Transaction Desk, click the **Import from Contacts** link to select their information. If not, you can enter their information and check the box to **Add to my Contacts** and this will add them to your Transaction Desk address book for future reference. Click **Save Contact Information** when you have filled in all desired fields. (Figure 15)

Current Step:
Step 4: Contacts/Participants

Seller Contact Information

Name: Robert [] Cummings [] [Import from Contacts](#)

Address: 4467 [] Firethorn []

City: Warren [] State: MI []

Zip Code: 48092 []

Home Phone: 586-555-1212 [] Work Phone: []

Fax: [] Cell: []

Pager: []

Email: rob@email.com []

Participant Options

Grant Contact access as Transaction Participant

Add to my Contacts

[Save Contact Information](#) [Cancel](#)

Figure 15

If you check the box to “Grant Contact access as Transaction Participant”, then additional fields will become available that allow you to assign them a login, password and PIN as well as assign the desired rights and permissions that the user should have. This includes what sections of the transaction they have access to, as well as which documents and forms they can view or edit.

Participant Options

Grant Contact access as Transaction Participant

* Login Name: [] (Minimum 6 characters) [Auto Generate Login](#)

* Password: [] (Minimum 4 characters)

Pin Number: [] (Minimum 4 characters)

Notifications: Never Send Notifications [v]

Expiration: mm/dd/yyyy [31] (Leave empty to never expire.)

Notes: []

Participant Permissions

Permission	Grant Access	Additional Permissions
Property Information	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant To Change Property Information
Transaction Dates	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant To Change Transaction Dates
Tasks	<input type="checkbox"/>	
Appointments	<input type="checkbox"/>	
Forms	<input type="checkbox"/>	
Documents	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant To Upload New Documents
Contacts	<input type="checkbox"/>	
Service Orders	<input type="checkbox"/>	

Document Permissions [+]



Form Permissions [+]

Contact Permissions [+]

Add to my Contacts

[Save Contact Information](#) [Cancel](#)

In Figure 16 you can see that the seller's contact information has now been added. Click **Next** when finished with this page.

 Current Step: Step 4: Contacts 

Transaction Contact successfully saved.

I would like to: Add New Transaction Contact






<input type="checkbox"/> Contact Name	Contact Type	Details
<input type="checkbox"/> RIVERPOINTE REALTY CO., INC	Listing Broker	
<input type="checkbox"/> TAMARA SMITH	Listing Agent	
<input type="checkbox"/> TAMI CUMMINGS	Selling Agent	
<input type="checkbox"/> REALCOMP II LTD. MLS	Selling Broker	
<input type="checkbox"/> Rob Cummings	Buyer	

Figure 16

Step 5: Forms/Contracts

The fifth step in the wizard is Forms/Contracts. This is where you add all of the needed forms and contracts to the transaction. It is recommended that at some time you put the forms that you normally use for each type of transaction into Quick Start groups so you can select them all with one click (see page 3 of manual). Click **Go** to the right of **I would like to: Add New Forms** to begin adding forms. (Figure 17)

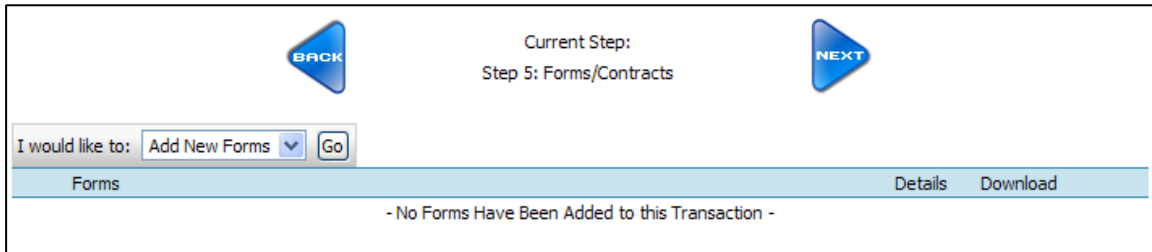


Figure 17

Selecting forms that are already in a Quick Start Group:

If you, or your office, have already put together a quick start group that contains the forms needed in this transaction, you can add all of your needed forms with just a couple of clicks.

When the forms list comes up, the Quick Start Groups will be at the top of the list. Simply click the desired group to highlight it and click **Add Selected Forms to Transaction**. If you need to add additional forms that are not in the Quick Start group, follow the instructions for **Adding forms Individually**.

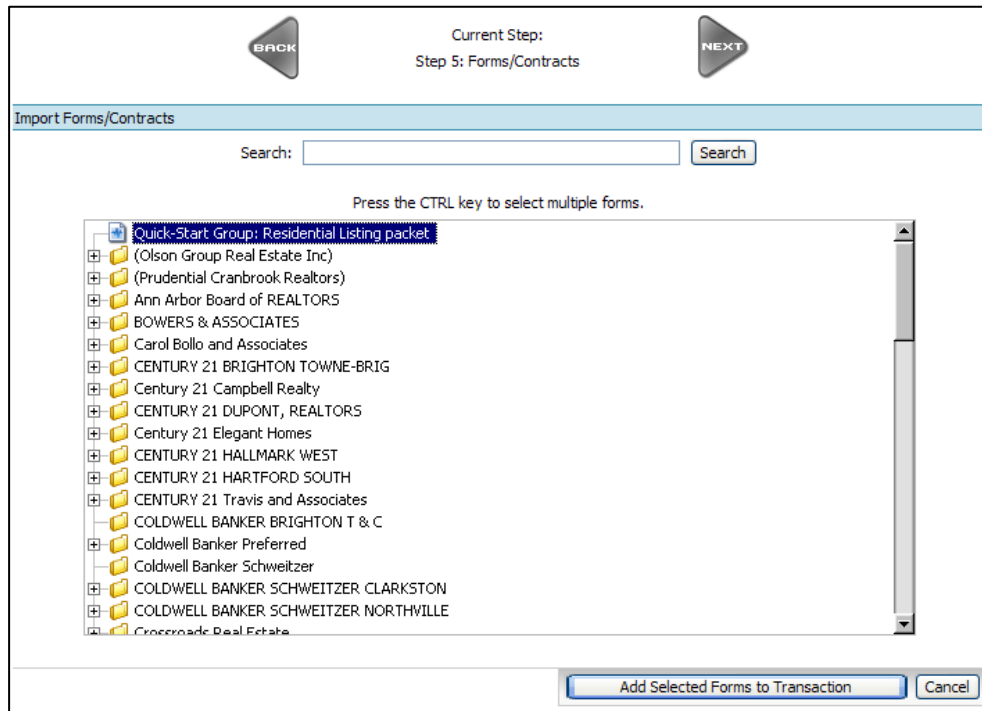


Figure 18

Selecting forms individually:

From this page, you will select the forms individually. Click the **plus sign** beside each form group from which you expect to select forms to expand the list of forms contained within that group. Press the **Control key (Ctrl)** on your keyboard while clicking the form names to select multiple forms. Once all of the desired forms are highlighted, click the “**Add Selected Form(s) to Transaction**” button when finished making selections. If, after reviewing the list of forms, you have no forms to add or delete, click **Next** to continue with the wizard.

The screenshot shows a software interface for selecting forms. At the top, there are navigation buttons: a left-pointing arrow labeled 'BACK', the text 'Current Step: Step 5: Forms/Contracts', and a right-pointing arrow labeled 'NEXT'. Below this is a header bar with the text 'Import Forms/Contracts'. Under the header, there is a search field with the label 'Search:' and a 'Search' button. A message reads 'Press the CTRL key to select multiple forms.' Below this is a list of forms, each preceded by a small icon with a plus sign. The list includes:

- Michigan - Exclusive Buyer Agency Contract (Short Form)
- Michigan - Exclusive Right to Sell Contract
- Michigan - Exclusive Sales Agency Contract
- Michigan - Instructions for Independent Contract or Agreement
- Michigan - Language for Buy and Sell Agreement Lead-Based Paint Addendum
- Michigan - Language for Landlords Acknowledgment Lead-Based Paint
- Michigan - Language for Lease Agreement Lead-Based Paint Addendum
- Michigan - Language for Sellers Acknowledgment Lead-Based Paint
- Michigan - Lead-Based Paint Landlords Disclosure Form
- Michigan - Lead-Based Paint Sellers Disclosure Form
- Michigan - Lead-Based Paint Sellers Disclosure Form (Letter)
- Michigan - Mutual Release of Buy and Sell Agreement
- Michigan - Non-Exclusive Limited Buyer Assistance Agreement
- Michigan - Notice of Buyer Agency
- Michigan - Notice of Deed Requirements for Unplatted Land
- Michigan - Notice of Transaction Coordinator
- Michigan - Protect Your Family From Lead in Your Home
- Michigan - Responsibilities of Landlords Under Residential Lead-Based Paint Hazard Reduction Act
- Michigan - Responsibilities of Sellers Under Residential Lead-Based Paint Hazard Reduction Act

At the bottom of the list, there are two buttons: 'Add Selected Forms to Transaction' and 'Cancel'.

Figure 19

Step 6: DocBox Documents

The DocBox allows you to upload documents into your transaction. DocBox documents can then be emailed, faxed or printed. The DocBox also allows you to have the documents that are uploaded viewable on your listings in Realcomp *Online*[®]. Documents stored in the DocBox must be one of the following file types: pdf, doc, xls, jpg, bmp, gif and tif. The DocBox functions can be accessed from either Step 6 of the Transaction Wizard (Figure 20) or from the DocBox link at the top of any Transaction Desk screen (Figure 21). The full DocBox management that is accessed through clicking the DocBox link (Figure 21) is discussed on page 35 of this manual.

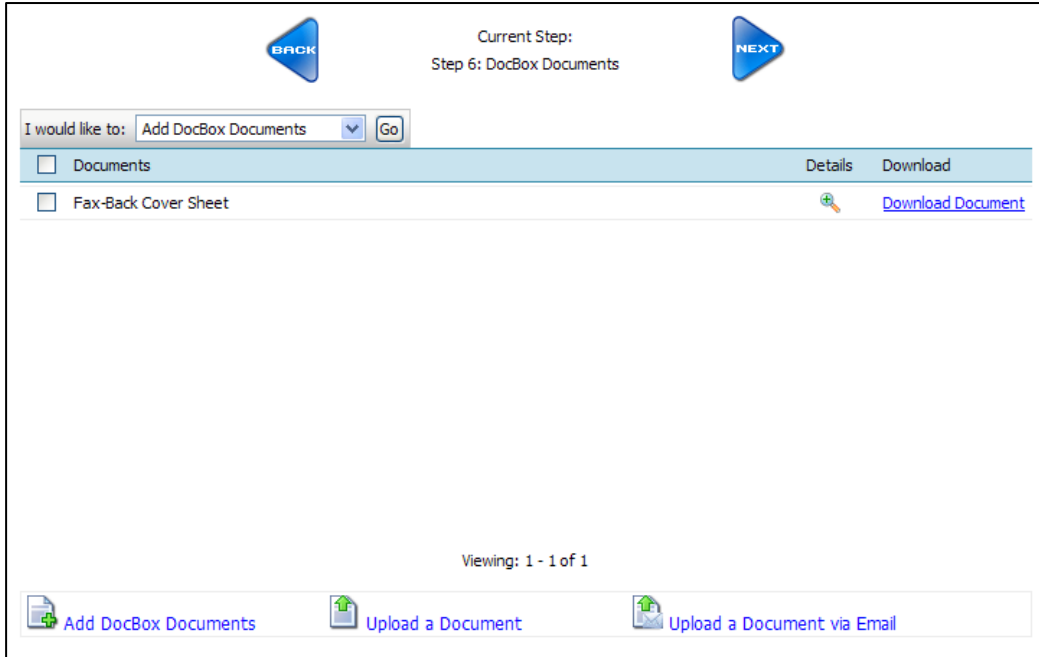


Figure 20

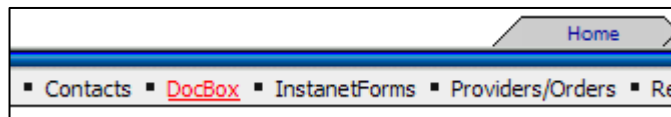


Figure 21

The “I would like to:” drop down list gives you the option to Add DocBox Documents, Upload Documents via Email, Upload a Document and Delete Selected Documents.

Add DocBox Documents:

The process to add documents can be started from the “I would like to:” drop down list or by clicking the **Add DocBox Documents** icon at the bottom of the page (Figure 20). This option is used when you already have the desired document in your DocBox and you want to add it to your transaction.

Once you have clicked the icon, you will be taken to the upload page. From here you can search for the desired document or navigate using the folders to find document, click the document name to highlight it and click **Import Selected Documents** (Figure 22).

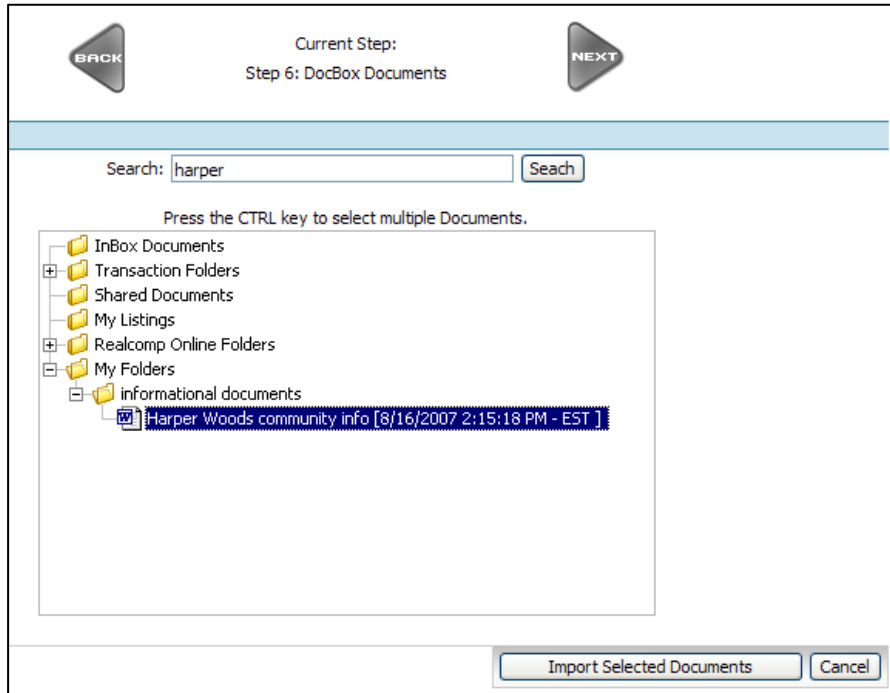


Figure 22

When the import is finished, you will be taken back to the document list and your new document will have been added. (Figure 23)

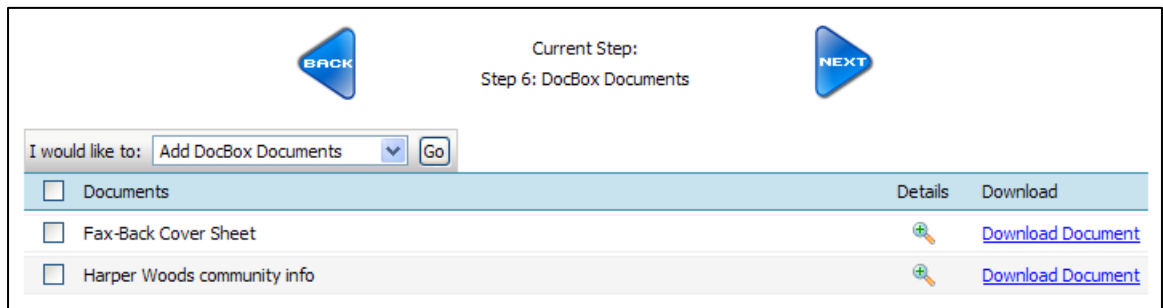


Figure 23

Upload Documents via Email:

The next option in Step 6 is to upload a document via email. Again, this can be done by clicking the icon at the bottom of the page or by selecting Upload Documents via Email from the “I would like to:” drop down list and clicking **Go**. Once you have done this an email message will open using the email program that is set as your default on your computer. The To: field and the Subject will already be filled in for you. **DO NOT CHANGE ANY OF THIS INFORMATION**. This is what tells the system where to file this document when it is received. The body of the email will contain instructions saying:

“Attach the documents you want to upload and send the email to FileUploadDev2@TransactionDesk.Com. The subject must remain unaltered for the email to be processed.”

Simply attach the desired documents and click **Send** on the email message. The next time you access this transaction, the emailed document will be available.

Upload a Document:

The final upload option in the transaction wizard is Upload a Document. This option is used when you have the desired document on your computer or on removable storage and you want to add it to your transaction. Again, this can be done by clicking the icon at the bottom of the page or by selecting Upload a Document from the “I would like to:” drop down list and clicking **Go**.

Uploading documents requires a 3rd party helper application. You will be prompted to accept it for installation the first time you use this feature, and any other times if you do not check the 'always accept' option on the prompt screen.

Once you have selected to upload a document you will be taken to the upload form. First, give the document a name. This will be the name that you will see in your list of documents and doesn't necessarily have to be the name by which it is currently saved on your computer. Use the drop down list to select the type of document. If the desired type is not in the list, you can use the **Add Document Type** link to add another option to the list. A description can be added if needed. Once these fields have been filled in, click the **Add** button. This will bring up the Microsoft Windows Browse box within which you will navigate to the location where your document is stored. When you have found your document, click it to highlight it and click **Open** in the lower right corner of the pop up window. You can only upload one document at a time. When you are finished, click the **Add Selected Document to Transaction** button.

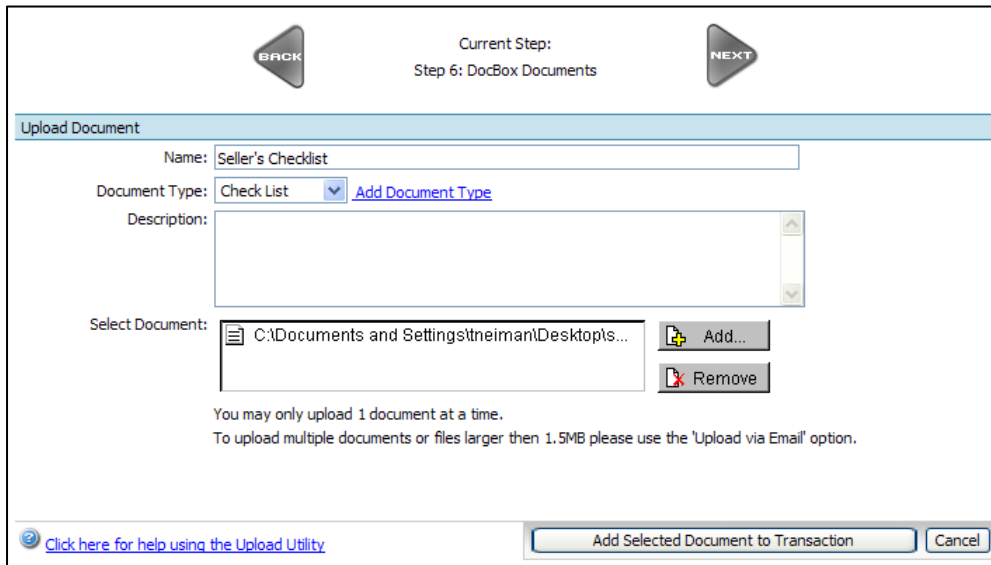


Figure 24

You will then be returned to the document list with a message that your document has been successfully uploaded.

Deleting Documents:

To delete a document from the list click the checkbox to the left of the title, select Delete Selected Documents from the “I would like to:” drop down list and click **Go**. (Figure 25)

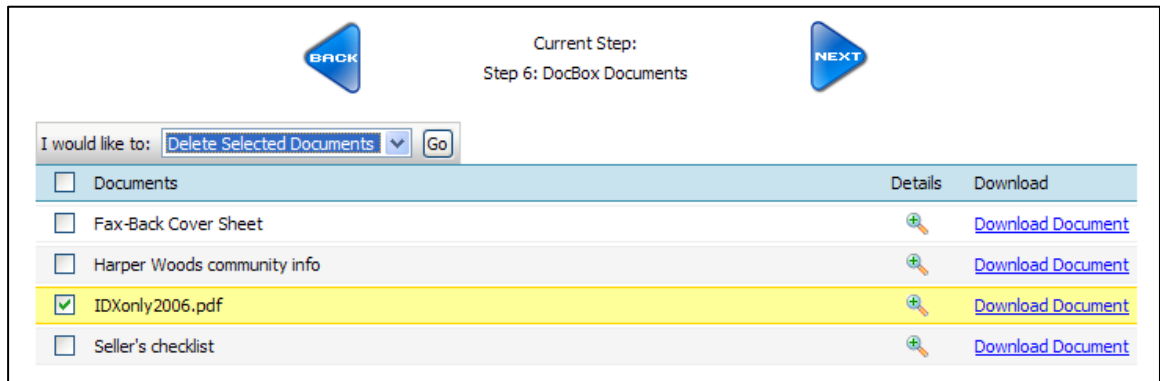


Figure 25

Step 7: Working with Others

The seventh step of the wizard is Working with Others. Select which TransactionDesk users or groups of users, in your office, will have access to the Transaction. If you need to add additional people that are not already showing up the Available Shares list, go to **Settings** and select **Sharing**.

First, check the box to select “I want to share this Transaction with others”. Next, select the person from the list on the left with whom you want to share this transaction. Click the Add button to move that person’s name from the left column to the right column. When you have added all of the necessary people, click the **Add New Shares for the Selected Members** button. (Figure 26)

The screenshot shows a software interface for sharing a transaction. At the top, there are 'BACK' and 'NEXT' navigation buttons. The current step is 'Step 6: Working With Others'. A status bar indicates 'Sharing Information: - This Transaction has not been Shared. -'. Below this is a 'Share with Others' section with a checked checkbox and the text 'I want to share this Transaction with others.'. There are two columns: 'Available Shares' with 'Julie Fisher' and 'Lois Hall', and 'Selected Shares' with 'Julie Fisher'. Between the columns are 'Add >>' and '<< Remove' buttons. At the bottom, there is a 'Notification' section with a checkbox for 'Notify Assignees upon creation of Transaction' and a large 'Add New Shares for the Selected Members' button.

Figure 26


To send an email to the person that you have added notifying them of this, check the box under “Notification” for “Notify Assignees upon creation of Transaction”.

You will return to the Step 6 screen and a section will have been added at the top of the page indicating that this person has been added. If you later want to delete the sharing of this transaction with this person, check the box next to the person’s name and click **Remove Shares**. (Figure 27)


Current Step:
Step 6: Working With Others

BACK **NEXT**

Sharing Information:

 Julie Fisher

Share with Others

 I want to share this Transaction with others.

Available Shares:

Julie Fisher
Lois Hall

Selected Shares:

Notification:

Notify Assignees upon creation of Transaction

Figure 27

Please click **Next** to go to the next step in the wizard.

Step 8: Tasks

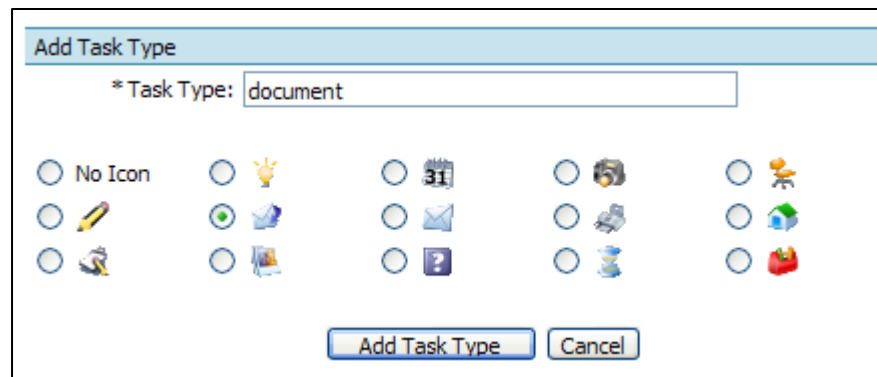
The tasks step allows you to indicate the various Tasks to be scheduled with this transaction from beginning to end to be sure that you don't later find out that something has been missed. Choose from adding new individual Tasks, Activity Plans or Task Templates.

Add New Task

To add a single task to your transaction, first select Add New Task from the "I would like to:" drop down list or click the **Add Task** icon at the bottom of the page. This will open the page to enter all task details. See screenshot of full screen on page 19.

General Task Information

- Task Name: Enter the task such as "Provide seller with CMA"
- Task Type: Select a tasks type. If the desired type is not in the drop down list, click the **Add Task Type** link to add the option. A pop-up window will display allowing you to enter the desired type and select an icon to be associated with that new type. Below the task type that was added was document and an icon has been selected. Click the **Add Task Type** button when finished to save.



- Due Date/Time: Enter the date and time by which this task must be completed. It can be an exact date and time, it can be indicated as a specific number of days from another activity date within the transaction or it can have no due date.
- Website: Enter the name of the website that must be accessed to complete this task, if any.
- Notes: Enter Notes regarding this task, if any.

Reminders

- Email: Set when the email reminders should be sent. The options are 15 minutes, 1 day, 1 week or 1 day before the task is due.
- Text Message: If you have a text message address set up in your Preferences, you will have the option of text message reminders. The options are the same as email reminders.

Assignees

- Select the person that needs to complete this task. All contacts that are marked as Participants on the Contacts/Participants screen or Shares on the Working with Others screen for this transaction will appear in the Available Assignees box. If the desired contact is not here, go back to the contacts page and check their settings. Click the contact's name to select it and click the Add button to add the contact to the Assignees box. If you would like other Participants to be able to view this task, even though it is not assigned to them, check the box above the Available Assignees section.

Notifications

- Check the appropriate box if you would like the assignee to be notified when you have created this item or if you would like to have them notified when this tasks changes.

Click **Save Task** when finished.

The screenshot displays a web-based task creation interface. At the top, there are navigation buttons for 'BACK' and 'NEXT', and a status indicator 'Current Step: Step 8: Tasks'. The form is organized into several sections:

- General Task Information:** Includes a text field for 'Task Name' (containing 'Provide seller with CMA'), a dropdown for 'Task Type' (set to 'document'), a dropdown for 'Priority' (set to 'Normal'), and a 'Due Date/Time' section with radio buttons for 'Due on', 'Due', and 'No Due Date'. The 'Due on' option is selected, showing a date of '08/20/2007' and a time of '12 PM :00'. There is also a checkbox for 'Due any time on this date'.
- Reminders:** Features a dropdown menu for 'Email' set to 'Never'.
- Assignees:** Contains an 'Assign to:' checkbox labeled 'Allow Unassigned Participants to view this Task.' Below this are two list boxes: 'Available Assignees' (listing 'TAMI CUMMINGS', '-- Participants --', and 'Rob Cummings') and 'Assignees' (listing 'TAMI CUMMINGS'). Between these boxes are 'Add >>' and '<< Remove' buttons.
- Notifications:** Includes two checkboxes: 'Notify assigned members immediately via email. (Upon creation)' and 'Notify owner upon status change of this Task.' Both are currently unchecked.

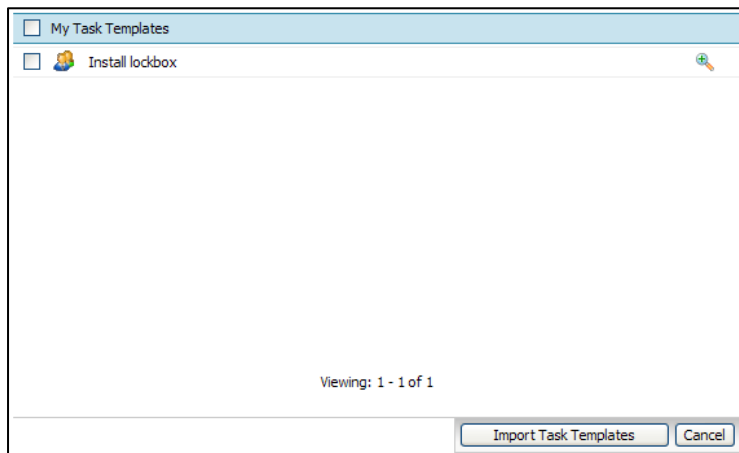
At the bottom right of the form, there are 'Save Task' and 'Cancel' buttons.

Import Task Template

A task template allows you to add an individual task to your Tasks by creating it once and just being able to insert it for future transactions. This way you don't have to retype your custom tasks each time you start a new transaction.

To import a Task Template that has already been saved into a transaction, click the **Import Task Template** icon or select this option from the "I would like to:" drop down list.

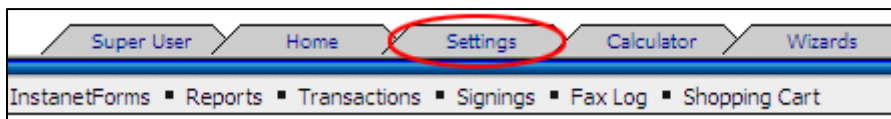
Your list of existing Task Templates will display. Select any that you want to insert by clicking the checkboxes to the left and clicking the **Import Task Templates** button.



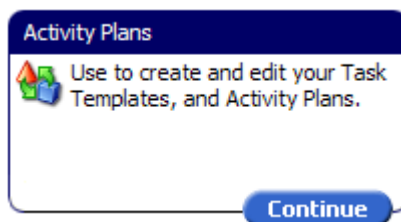
Adding New Task Templates

Any tasks that you add to each transaction that are not already included in the Activity Plans that you use should be added into Task Templates. This way you set it up once and then it is in a list to easily add for any future transactions.

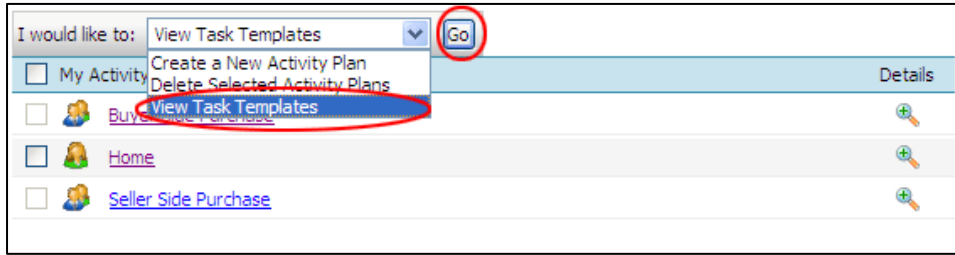
To add a Task Template, click the Settings tab at the top of any page.



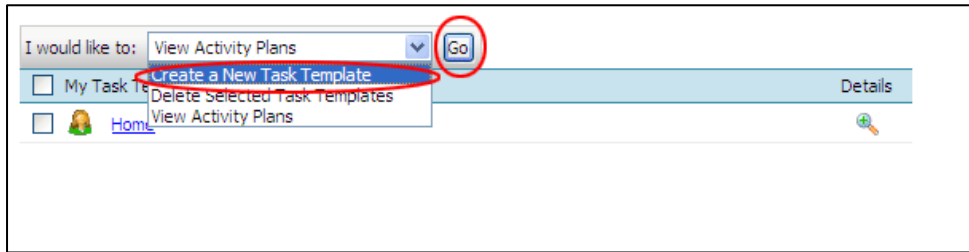
On Settings click **Continue** on the Activity Plans item.



By default you will be viewing Activity Plan options. Select View Task Templates from the “I would like to:” drop down list and click **Go** to switch the view to Task Template options.



When the Task Template options appear select Create a New Task Template from the “I would like to:” drop down list.



Fill in desired information as detailed on pages 18 and 19 and click Save Task Template. NOTE: Assignees will not be available because those are attached to a specific transaction. They will be completed when this Task Template has been added to the transaction.

Task Template Information

* Task Name:

Task Type: [Add Task Type](#)

Priority:

Due Date: None, I will set the Due Date after the Task is created

Due Days

Website:

Notes:

Reminders

Reminders: (Email Reminder)

Auto Assign

Automatically assign this Task to Contacts of type:

Transaction Contact Type: [Add Transaction Contact Type](#)

Description

Description:

Transaction Coordinator

Office Task Template: (Visible to Everyone)

Allow others to copy this Task Template

Import Activity Plans

Activity Plans are the Quick Start Groups of Tasks. Adding an Activity Plan allows you to add all of the tasks associated with a part of the listing process all at once instead of having to add them each individually.

To add an Activity Plan to your transaction, click the **Import Activity Plan** icon at the bottom of the page or select that item from the “I would like to:” drop down list. A pop up window will appear with your available Activity Plans listed. Realcomp has provided many activity plans for you but you can make custom ones by modifying the ones that are already there if you choose. Super Users (brokers and some office staff) can also make Activity Plans that are specific to their office and make them available to everyone in the office. Click the checkbox to select the desired Activity Plan(s) and click the **Import Activity Plans** button.

My Activity Plans	
<input type="checkbox"/>	Buyer Prospect - Residential Sale
<input type="checkbox"/>	Commercial Property - New Listing
<input type="checkbox"/>	Commercial Property - Listing - Accepted Contract
<input type="checkbox"/>	Commercial Property - Purchase - Accepted Contract
<input type="checkbox"/>	Commercial Property Lease - New Listing
<input type="checkbox"/>	Condominium - Listing - Accepted Contract
<input type="checkbox"/>	Condominium - New Listing
<input type="checkbox"/>	Condominium - Purchase - Accepted Contract
<input type="checkbox"/>	Lease - Commercial - Leasing Agent
<input type="checkbox"/>	Lease - Residential - Leasing Agent

Viewing: 1 - 10 of 23

Import Activity Plans Cancel

To edit Activity Plans to customize your own, go to **Settings** and click **Continue** on the Activity Plans item. Select a provided Activity Plan that most closely matches the one that you want. Click the name to go to the details page. From there you can add or delete tasks and resave your own custom version.

Step 9: Transaction Overview

The ninth and final step of the wizard is a Transaction Overview where you can review the information that has been input. If any information is incorrect, you can use the navigation bar on the left to select any of the other eight steps to make corrections. Click **Save and Exit** when finished.

BACK Current Step: Step 9: Transaction Overview SAVE & EXIT

Transaction Information

Address: 602 FARNUM
ROYAL OAK, MI 48067

MLS Number:

List Price: \$165,000.00 Purchase Price:
List Date: September 12th, 2007 Purchase Date:
Expiration Date: March 12th, 2008 Closing Date:

Documents - No Documents -

InstanetForms

- Listing Form - Residential / Site Condo
- Metropolitan - Exclusive Right To Sell Contract
- Status Change Sheet

Figure 28

Once you have saved the transaction, it will take you to a transaction detail page and you can continue to complete the transaction by clicking Edit on any of the sections.

Transaction: 19774 ELKHART ST
Transaction Code: [Email Transaction information to another TransactionDesk User](#)

Transaction Wizard
Use the step by step wizard to work on this Transaction. [Click Here.](#)

I would like to: Add Contacts/Participants [Go]

Transaction Information [Edit](#)

Address: 19774 ELKHART ST
HARPER WOODS, MI 48225

MLS Number: 27015616

List Price: \$99,900.00 Purchase Price:
List Date: January 24th, 2007 Purchase Date:
Expiration Date: January 24th, 2008 Closing Date:

Contacts [Edit](#)

RIVERPOINTE REALTY CO, INC	Listing Broker
TAMARA SMITH	Listing Agent
TAMI CUMMINGS	Selling Agent
REALCOMP II LTD. MLS	Selling Broker
Deb Cummins	River

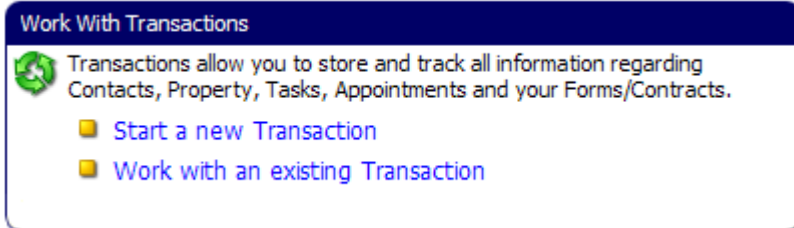
InstanetForms [Edit](#)

- [Michigan - Exclusive Right To Sell Contract](#)
- [Michigan - Lead-based Paint Sellers Disclosure Form](#)
- [Michigan - Protect Your Family From Lead In Your Home](#)

Figure 29

Editing an Existing Transaction

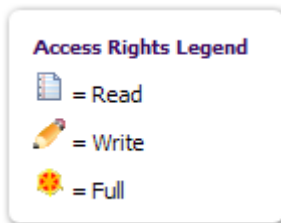
Once a transaction has been entered and saved, you will need to go back in and edit the transaction each time you have new or changed information. To access a transaction that you previously saved, click the **Work with an Existing Transaction** link on the online forms homepage.



This will take you to your list of transactions. In the “**I would like to:**” drop down list you have the options of Create a New Transaction, Create a Listing, View my Transaction Templates, Delete Selected Transactions, and Mark Selected as Closed. To use any of these options place a check in the checkbox to the left of the transaction name, make the selection from the drop down list and click **Go**.

<input type="checkbox"/>	My Transactions	Access Rights	Status	Details
<input type="checkbox"/>	New Listing Transaction		Open	
<input type="checkbox"/>	19774 ELKHART ST		Open	
<input type="checkbox"/>	47675 NORTON CT		Open	

The Access Rights column lets you know what rights you have to each transaction. The grayed out check box and the piece of paper icon under Access Rights for 47675 Norton above indicate that this transaction is shared and the user does not have editing rights.



Clicking the magnifying glass icon under Details will give the details about that Transaction including when it was created and by whom.

<input type="checkbox"/> 19774 ELKHART ST		Open
Created By: TAMI CUMMINGS	Transaction Type: Sale/Purchase	
Address: 19774 ELKHART ST HARPER WOODS, MI 48225		
List Price: \$99,900.00	Purchase Price:	
List Date: January 24th, 2007	Acceptance Date:	
Expiration Date: January 24th, 2008	Closing Date:	
Date Created: 8/6/2007 11:28:54 AM - EST	Last Modified: 8/6/2007 12:06:04 PM - EST	
Description: CREATED AUTOMATICALLY ON [8/6/2007 11:28:54 AM - EST] FROM IMPORT OF Realcomp MLS LISTING DATA - LISTING NUMBER [27015616]		

Clicking the transaction name will take you to the Transaction Overview and give you additional editing options.

Template Options

- Transaction Overview
- Transaction Dates
- Transaction History
- General Information
- Property Information
- Call Log
- Contacts/Participants
- Service Orders

Forms/Documents

- InstanetForms
- Documents

Tasks/Calendar

- Tasks
- Calendar/Appointments

Sharing

- Sharing

1 2 3 Easy as 1-2-3! Easy 1-2-3

[Click Here For Online Help](#) The Easy 1-2-3 guides can be turned off in [your account preferences](#).

Transaction: 602 FARNUM

Transaction Code: [Email Transaction information to another TransactionDesk User](#)

I would like to: Add Contacts/Participants Go

Transaction Wizard

Use the step by step wizard to work on this Transaction. [Click Here.](#)

Transaction Information [Edit](#)

Address: 602 FARNUM
ROYAL OAK, MI 48067

MLS Number:

List Price: \$165,000.00 Purchase Price:

List Date: September 12th, 2007 Acceptance Date:

Expiration Date: March 12th, 2008 Closing Date:

Event Progress

Task: (0/13)

Appointments: (0/0)

Overall: (0/13)

Progress

Documents [Edit](#)

- No Documents -

[Add Documents](#)

InstanetForms [Edit](#)

- [Listing Form - Residential / Site Condo](#)
- [Metropolitan - Exclusive Right To Sell Contract](#)
- [Status Change Sheet](#)

Contacts/Participants [Edit](#)

[Rob Cummings](#) Seller

Tasks [Edit](#)

- [Contact home owners association](#)
- [Deliver signed contracts](#)
- [Identify utility companies](#)

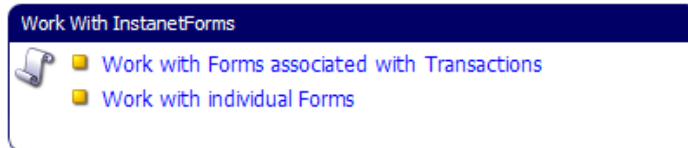
From this page you can go back into the Transaction Wizard to make changes, add/remove forms, add/remove contacts, edit transaction information, start a call log and much much more.

26

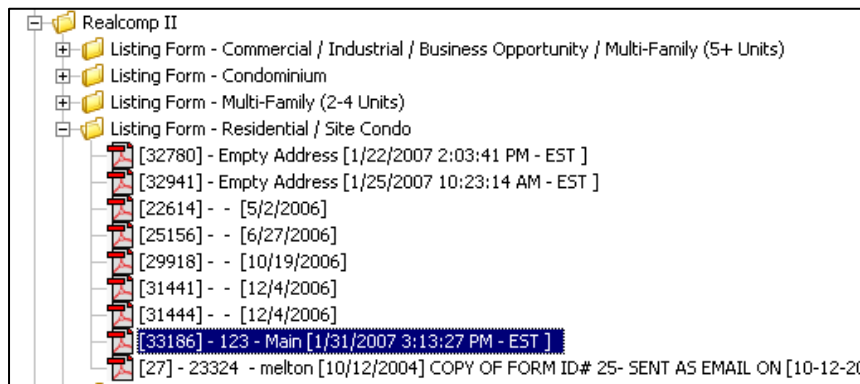
Attaching a Completed Form to an Existing Transaction

Sometimes a form will be completed prior to a transaction being started, or after the transaction has been saved but it was completed through the individual forms. This form can still be attached to the transaction as though it were a part of the transaction from the beginning.

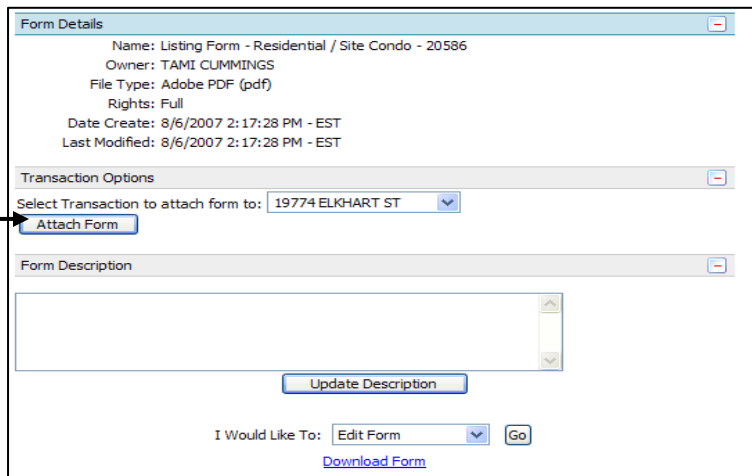
1. Access the individual forms by clicking on Work with Individual Forms on the online forms homepage.



2. Open the folders to navigate to the desired form. For example, if it is a Realcomp residential profile form that you want to attach, click the plus sign next to the Realcomp folder, click the plus sign next to the residential profile form folder and click the desired form once to highlight it.



3. Once the form is selected, go to the right side and click the plus sign to expand the Transaction Options section. Select the desired transaction and click the button **Attach Form**.

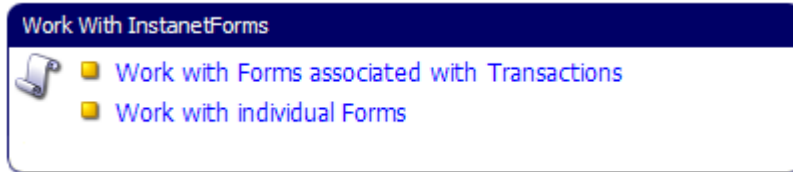
A screenshot of a "Form Details" window. The window has a title bar and a close button. It contains the following information:

- Name: Listing Form - Residential / Site Condo - 20586
- Owner: TAMI CUMMINGS
- File Type: Adobe PDF (pdf)
- Rights: Full
- Date Create: 8/6/2007 2:17:28 PM - EST
- Last Modified: 8/6/2007 2:17:28 PM - EST

Below this is a "Transaction Options" section with a plus sign to expand it. It contains a dropdown menu labeled "Select Transaction to attach form to:" with the value "19774 ELKHART ST". Below the dropdown is a blue button labeled "Attach Form". Below that is a "Form Description" section with a plus sign to expand it, containing a text area and a blue button labeled "Update Description". At the bottom, there is a dropdown menu labeled "I Would Like To:" with the value "Edit Form" and a "Go" button. Below the "Go" button is a blue link labeled "Download Form".

Starting an Individual Form

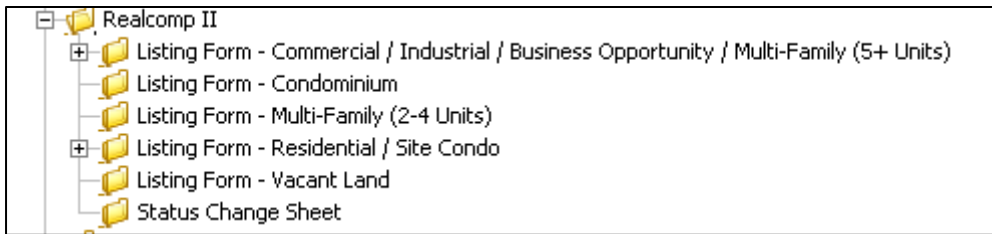
If you want to simply fill out a form without making it a part of a transaction, you can access Instanet Forms from the homepage by clicking the **Work with Individual Forms** link.



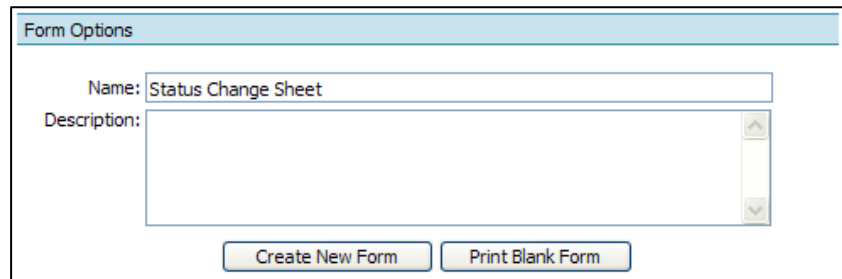
To find the desired form you may need to click the plus sign next to Individual Forms to expand the list of forms to which you have access.



Once those groups display, click the plus sign next to the group to which the desired form would belong. For example, click the plus sign next to Realcomp to use a listing profile form or a status change form. If you want to access a form that you previously saved, click the plus sign to the left of that form name and the ones that you have previously saved will be listed to access so you can modify, print, email, etc.



Select the desired form and options will open to the right to either **Print Blank Form** or **Create New Form**. Select **Create New Form** to fill out the form online. If you are entering a new listing, see page 30 for the instructions for the PRD search and submitting listings.

A screenshot of a software dialog box titled "Form Options". The dialog box has a light blue header. Below the header, there is a text input field labeled "Name:" containing the text "Status Change Sheet". Below the text input field, there is a text area labeled "Description:" which is currently empty. At the bottom of the dialog box, there are two buttons: "Create New Form" and "Print Blank Form".

Entering a Listing into the MLS Directly from Online Forms

Realcomp *Online*[®] has the added functionality of being able to submit your listing through the online forms and, with your broker's approval, you will no longer have to complete the additional step of entering the listing through Listing Load. This listing entry can be completed as a part of a transaction by clicking the Start Listing link or from an individual form.

Accessing the profile form from within a transaction

Once you have set up your transaction and saved it, go to the Transaction Overview page and click the name the desired profile form from the list of forms included in the transaction.

Transaction: 19774 ELKHART ST
Transaction Code: [Email Transaction information to another TransactionDesk User](#)

Transaction Wizard
Use the step by step wizard to work on this Transaction. [Click Here.](#)

I would like to:

Transaction Information [Edit](#)

Address: 19774 ELKHART ST
HARPER WOODS, MI 48225
MLS Number: 27015616
List Price: \$99,900.00 Purchase Price:
List Date: January 24th, 2007 Purchase Date:
Expiration Date: January 24th, 2008 Closing Date:

Contacts [Edit](#)

RIVERPOINTE REALTY CO, INC	Listing Broker
TAMARA SMITH	Listing Agent
TAMI CUMMINGS	Selling Agent
REALCOMP II LTD. MLS	Selling Broker
Bob Cummings	Buyer

InstanetForms [Edit](#)

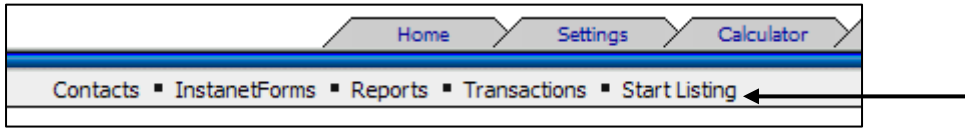
- [Listing Form - Residential / Site Condo](#)
- [Michigan - Exclusive Right To Sell Contract](#)
- [Michigan - Lead-based Paint Sellers Disclosure Form](#)
- [Michigan - Protect Your Family From Lead In Your Home](#)

Be patient. There may be a delay of a few seconds before the data appears in the form after the form itself displays. When the form and prefilled information displays, fill out all the additional information and click the **Realcomp** button at the top of the form edit screen to enter the listing into the MLS and get your new MLS number.

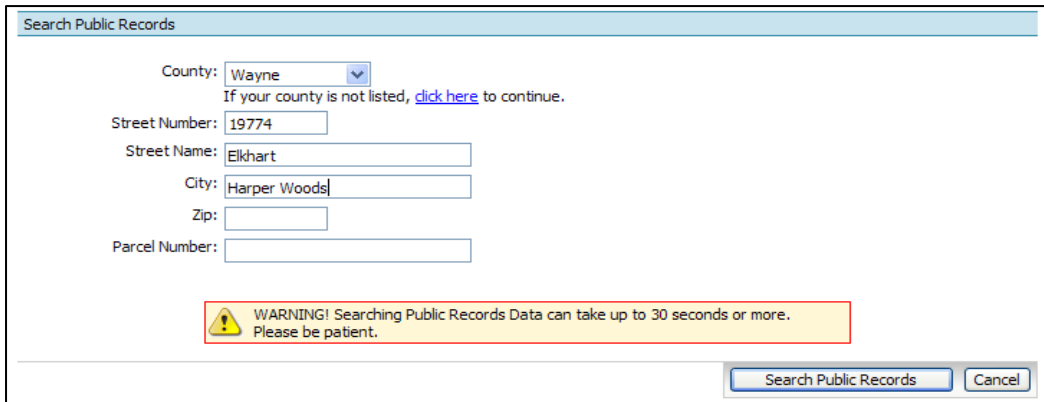


Accessing the profile form through the Start Listing link

Realcomp has made it very easy to start a new listing. At the top of the page click the Start Listing link.

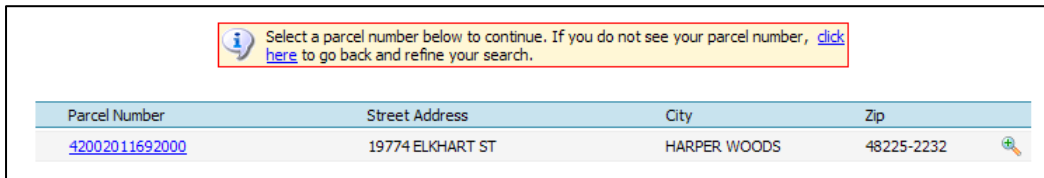


Simply select the county and enter the address and click the **Search Public Records** button and the system will search public records and return any matches. Be patient, this may take up to 30 seconds to load.



The image shows a form titled 'Search Public Records'. It has several input fields: 'County' (a dropdown menu with 'Wayne' selected), 'Street Number' (text input with '19774'), 'Street Name' (text input with 'Elkhart'), 'City' (text input with 'Harper Woods'), 'Zip' (text input), and 'Parcel Number' (text input). Below the fields is a warning message: 'WARNING! Searching Public Records Data can take up to 30 seconds or more. Please be patient.' At the bottom right are two buttons: 'Search Public Records' and 'Cancel'.

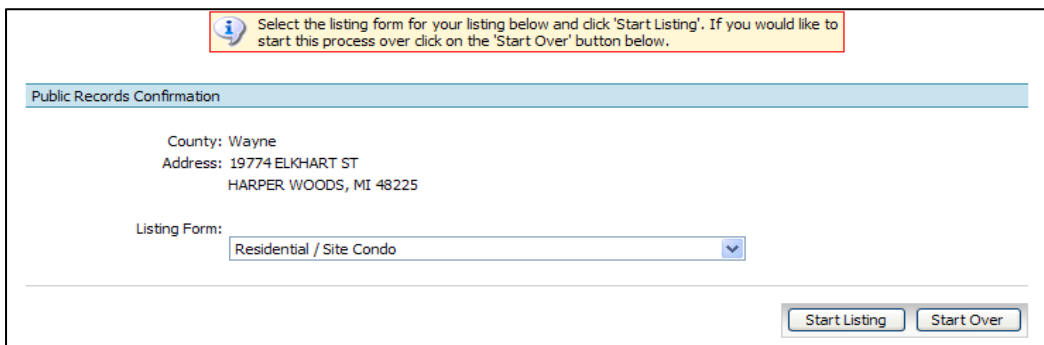
When the search results display, click the property ID number (PIN) to select that record.



The image shows a table with search results. Above the table is a message: 'Select a parcel number below to continue. If you do not see your parcel number, click here to go back and refine your search.' The table has four columns: 'Parcel Number', 'Street Address', 'City', and 'Zip'. There is one row of data with a magnifying glass icon to the right.

Parcel Number	Street Address	City	Zip
42002011692000	19774 ELKHART ST	HARPER WOODS	48225-2232

On the next screen you will verify the information is correct, select the correct property type for the listing and click Start Listing.

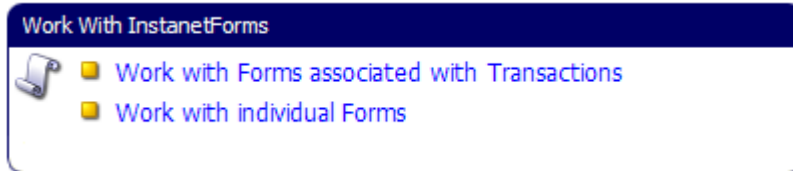


The image shows a form titled 'Public Records Confirmation'. It displays the search results information: 'County: Wayne', 'Address: 19774 ELKHART ST HARPER WOODS, MI 48225'. Below this is a 'Listing Form' dropdown menu with 'Residential / Site Condo' selected. At the bottom right are two buttons: 'Start Listing' and 'Start Over'.

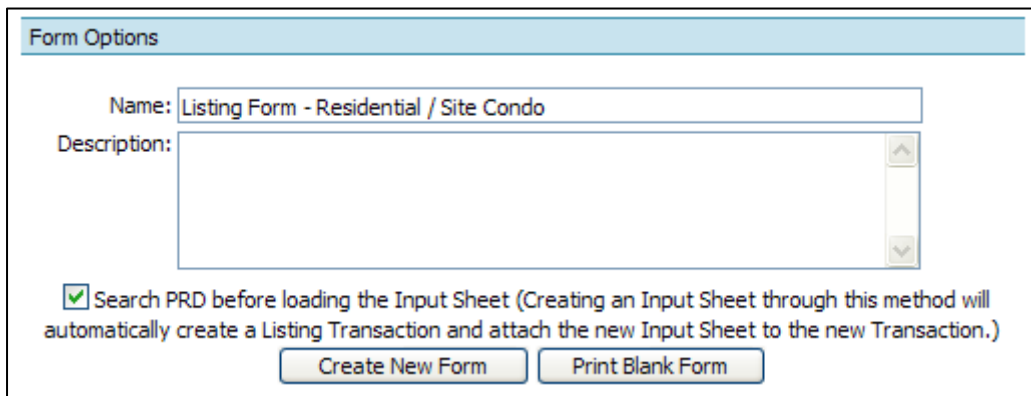
The profile form will then open and the information from public records will already be filled in for you!

Accessing the profile form as an individual form

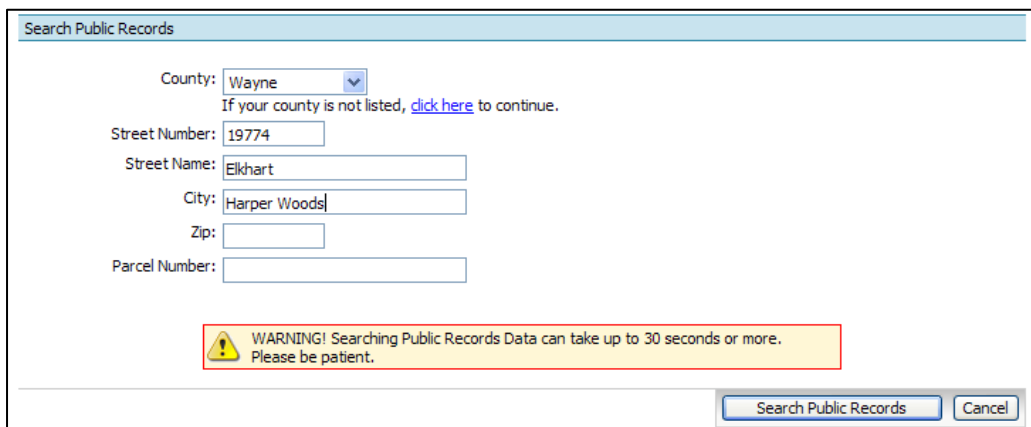
You can also fill out the profile form by itself and submit it to the MLS to get an MLS number without having to first re-enter all of the information into Listing Load. From the Instanet homepage, click Work with Individual Forms.




Click the plus sign to the right of the Realcomp folder to view all of the Realcomp forms. Click the desired Realcomp profile form to highlight it. The Form Options window will open on the right.


A screenshot of a "Form Options" dialog box. The title bar is light blue and contains the text "Form Options". Inside the dialog, there is a "Name:" label followed by a text box containing "Listing Form - Residential / Site Condo". Below that is a "Description:" label followed by a large, empty text area with vertical scroll bars. At the bottom left, there is a checked checkbox with the text "Search PRD before loading the Input Sheet (Creating an Input Sheet through this method will automatically create a Listing Transaction and attach the new Input Sheet to the new Transaction.)". At the bottom center, there are two buttons: "Create New Form" and "Print Blank Form".

When you click **Create New Form**, the system will take you to a search of public records and will prefill just like Listing Load! Simply select the county and enter the address and click the **Search Public Records** button and the system will search public records and return any matches. Be patient, this may take up to 30 seconds to load.

A screenshot of a "Search Public Records" dialog box. The title bar is light blue and contains the text "Search Public Records". The form contains several input fields: "County:" with a dropdown menu showing "Wayne"; "Street Number:" with a text box containing "19774"; "Street Name:" with a text box containing "Elkhart"; "City:" with a text box containing "Harper Woods"; "Zip:" with an empty text box; and "Parcel Number:" with an empty text box. Below the input fields, there is a warning message in a yellow box with a red border: "WARNING! Searching Public Records Data can take up to 30 seconds or more. Please be patient." At the bottom right, there are two buttons: "Search Public Records" and "Cancel".

When the search results display, click the property ID number (PIN) to select that record.

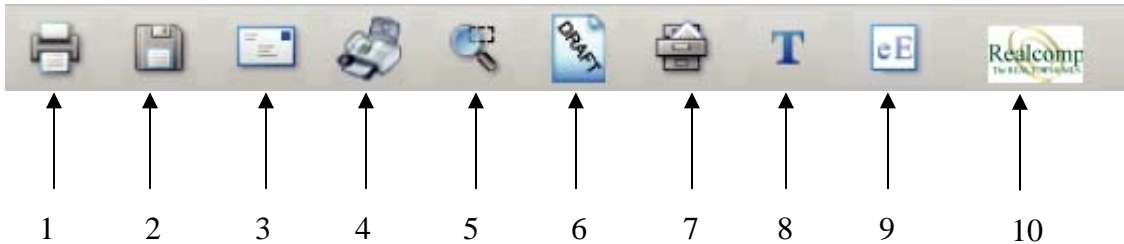
 Select a parcel number below to continue. If you do not see your parcel number, [click here](#) to go back and refine your search.

Parcel Number	Street Address	City	Zip	
42002011692000	19774 ELKHART ST	HARPER WOODS	48225-2232	

On the next screen you will verify the information is correct and click Start Listing. The profile form will then open and the information from public records will already be filled in for you!

Editing a Form

Once you have opened a form, either through a transaction or individually, you can enter information or edit previously entered information as desired. The toolbar at the top of the form gives additional functionality.



1. **Print** – click the printer icon to print the form
2. **Save** – click the disk icon to save the changes to your form
3. **Email** – click the envelope to send the form as a link in an email. You have the option to:
 - a. Send the form as UNLOCKED – EDITABLE
 - b. Send the form as LOCKED – READ ONLY
4. **DocBox** – DocBox Functions
 - a. Send form as Email with DOCBOX Fax back Cover Sheet
 - b. Send form as Fax with DOCBOX Fax back Cover Sheet
 - c. Send Copy of form into your DOCBOX account
5. **Zoom** – click the magnifying glass icon to zoom in or out
6. **Watermark** – click the draft button to apply or remove a “Draft” or “Confidential” watermark on the form
7. **Archive** – click the filing cabinet button to save the form to your computer. This is not recommended until after you will no longer need to regularly access a form since saving it to your computer would not make it accessible from other places
8. **Font** – Change the style, color and/or size of the font on the form (not available on profile forms and doesn’t work on all fields)
9. **Change Case** – click the “eE” button to toggle between capital, lower case and title case letters (not available on profile forms)
10. **Realcomp** – Submit data to the MLS and generate an MLS number (only available on profile forms)

After saving your changes, to go back to the previous screen, click the **Go Back** button.

Emailing Forms

There are a couple of ways to email forms from Transaction Desk™. It can be done either from the Transaction Overview or from the individual forms.

Emailing Forms from a Transaction

1. From the Transaction Desk™ homepage, click **Work with an Existing Transaction**.
2. Click the name of the transaction (link) to view the transaction details.
3. In the InstanetForms box, click Edit.
4. Check the desired forms using the checkboxes and go to the top of the page to select **Email Selected Forms** from the “I would like to” drop down list. Click **Go**.

<input type="checkbox"/> Forms	Details	Download
<input checked="" type="checkbox"/> Listing Form - Residential / Site Condo		Download Form
<input checked="" type="checkbox"/> Michigan - Exclusive Right to Sell Contract		Download Form
<input type="checkbox"/> Michigan - Lead-Based Paint Sellers Disclosure Form		Download Form
<input type="checkbox"/> Michigan - Protect Your Family From Lead in Your Home		Download Form

5. This will take you to the form to enter email information. You can select whether the forms should be sent as an attachment or as a link (like prospects). It is advised that the forms are sent as a link because some email servers are rather particular about accepting attachments.

Fill in the email recipient's name and email address along with any message that you would like to have included.

If you would like to include a FaxBack Cover Sheet check the box and complete the cover sheet information.

Click **Send Email** when finished.

Form Email Options

Send Email as Attachment
 Send Email as Link
 Allow recipient to make changes

Email Details

* Recipient:
* Email Address:
CC:
BCC:
Message:

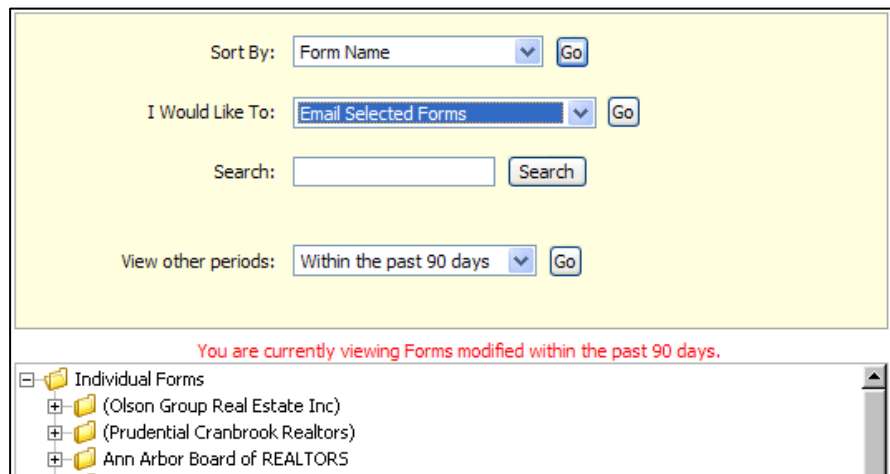
Cover Sheet Options

Send Fax-Back: Cover sheet? Yes, send cover sheet
Cover Sheet Header:
Cover Sheet Message:

Please notify me when this fax is returned.
 Email
 Please include returned Documents in Notification Email.

Emailing Multiple Individual Forms

1. From the Transaction Desk™ homepage, click **Work with Individual Forms**.
2. Click the **plus sign** beside each form group from which you expect to select forms to expand the list of forms contained within that group.
3. Press the **Control key (Ctrl)** on your keyboard while clicking the form names to select multiple forms.
4. Once all of the desired forms are highlighted, select the “**Email Selected Forms**” from the “I would like to” drop down list at the top of the page. Click **Go**.



The screenshot shows a web interface with a yellow background for the filter section. It includes the following elements:

- Sort By: Form Name (dropdown) and Go button.
- I Would Like To: Email Selected Forms (dropdown) and Go button.
- Search: text input field and Search button.
- View other periods: Within the past 90 days (dropdown) and Go button.

Below the filters, a red message states: "You are currently viewing Forms modified within the past 90 days." Below this is a tree view of folders:

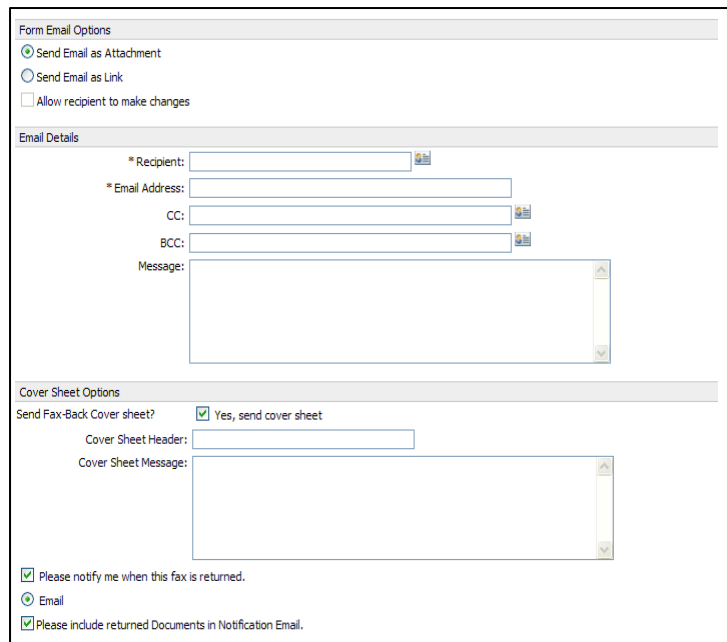
- Individual Forms
 - (Olson Group Real Estate Inc)
 - (Prudential Cranbrook Realtors)
 - Ann Arbor Board of REALTORS

5. This will take you to the form to enter email information. You can select whether the forms should be sent as an attachment or as a link (like prospects). It is advised that the forms are sent as a link because some email servers are rather particular about accepting attachments.

Fill in the email recipient's name and email address along with any message that you would like to have included.

If you would like to include a FaxBack Cover Sheet check the box and complete the cover sheet information.

Click **Send Email** when finished.



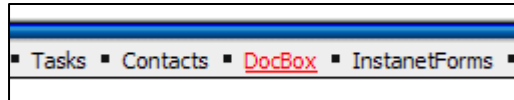
The screenshot shows a dialog box titled "Form Email Options" with the following sections:

- Form Email Options:**
 - Send Email as Attachment
 - Send Email as Link
 - Allow recipient to make changes
- Email Details:**
 - * Recipient: text input field
 - * Email Address: text input field
 - CC: text input field
 - BCC: text input field
 - Message: text area
- Cover Sheet Options:**
 - Send Fax-Back Cover sheet? Yes, send cover sheet
 - Cover Sheet Header: text input field
 - Cover Sheet Message: text area
- At the bottom, there are three checked checkboxes:
 - Please notify me when this fax is returned.
 - Email
 - Please include returned Documents in Notification Email.

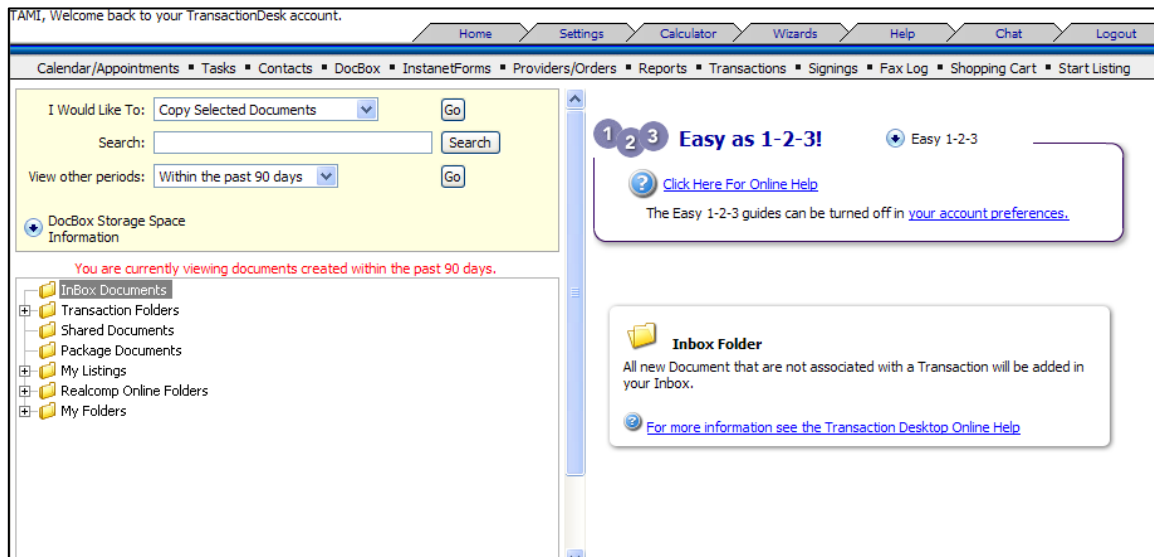
The DocBox

From the DocBox you can upload documents from your computer or fax to the TransactionDesk™ system. Examples of documents are: Seller's disclosure forms, addendums, surveys, etc. These documents can then be viewed, faxed, or emailed by anyone with whom the user wants to share them. Everything is done electronically and is safely stored online where it's accessible to the agent from any location, at any time. This eliminates the need to "run to the office" to access new arrivals of paperwork.

To access the Doc Box click the link at the top of the TransactionDesk™ homepage.



The DocBox page is very similar to the Instanet Forms page in the system. The folders that you have available are on the left side and instructions and actions are supplied on the right.



The default folders are:

 **Inbox Documents:**

This is the default directory. Most new documents will be created here if no other directory is selected.

 **Transaction Folders:**

The Transaction Folder contains sub directories for all of your Transactions.

 **Shared Documents:**

The Group Folder contains sub directories for all of the documents which have been shared with other users within your office.

Package Folders:

The Package Folder contains all your packages which have been created within TransactionDesk. The documents contained within this directory have limited functionality.

Realcomp Online Folders

These Documents are provided to you by your Board or Realcomp.

My Folders:

The My Folders and Documents Folder is your personal section and you can customize by adding sub directories.

In working with the folders in this view, the “I would like to:” drop down list gives you the options of:

- Copy Selected Documents
- Create a Fax-Back Cover Sheet
- Create New Folder
- Delete Selected Documents
- Delete Selected Folders
- Email Selected Documents
- Fax Selected Documents
- Merge Selected Documents
- Move Selected Documents
- Package Selected Documents
- Upload Documents via Email
- Upload Document

By default you are viewing the documents created in the last 90 days. To see older documents, select a different time period using the “View other periods:” drop down list.

Sending Fax-Back Cover Sheets to Clients

When documents are sent to a client from TransactionDesk™ with a “Fax-Back” cover sheet, the client can fax the forms back to you by faxing them to your DocBox in TransactionDesk™. The “Fax Back” cover sheet contains the fax number for TransactionDesk™ and a barcode which directs the faxed document(s) to your DocBox.

When you fax a document from TransactionDesk™, the fax form has a selection to include a fax back cover sheet. You also have the option to be notified when it is faxed back to you and whether that notification should be by email or text message. If the notification is emailed, you can also have the document attached to that email. Click **Send Fax** button at the bottom of the page.

The following Documents have been selected to be Faxed

Item 1: Seller's checklist

Fax Details

* Recipient: Lynn Pastoria

* Fax Number: (586) 555 - 1212

Cover Sheet Options

Send Fax-Back Cover sheet? Yes, send cover sheet

Cover Sheet Header: Checklist

Cover Sheet Message: Please sign and return using the cover sheet provided. Call me at (586) 444-1313 if you have any questions. Thanks!

Please notify me when this fax is returned.

Email Text Message

Please include returned documents in Notification Email.

Using the DocBox instead of Scanning

You can also use the “Fax Back” cover sheets to upload paper documents into your own TransactionDesk™ account, without having to scan and upload them separately. Simply print a Fax-Back cover sheet and fax yourself your hard copy. To print a Fax-Back cover sheet from your DocBox, open the Transaction Folders by clicking the plus sign and click to select the desired transaction. Once the transaction folder is highlighted, select the Create a Fax-Back Cover Sheet from the “I would like to:” drop down list and click **Go**. Fill out the form, like above, and click **Create Fax-Back Cover Sheet** button. You will be taken back to the DocBox and toward the top left there will be a link to the pdf that was created (see below). Click the link and print the pdf. You are now ready to fax all of your hard copy documents into Transaction Desk and move closer to becoming paperless.

I Would Like To: Copy Selected Documents

Search:

View other periods: Within the past 90 days

★ PDF File Created Successfully

[click to open PDF, or right-click and 'save target as' to download](#)

⬇ DocBox Storage Space Information

Viewing DocBox Documents on Realcomp Online®

TransactionDesk™ will allow users subscribing to TM to add DocBox documents to listings on Realcomp Online®. Forms such as seller's disclosures can be added to listings to be viewed by any other agent interested in more information about the property. A "D" (for documents) will be added to summary views next to the "P", "M", and "T" indicators for photos, map and virtual tour to show the presence of additional online "documents".

Status	List No	Price	Area	Address	Bed	Bath	Style	Sq Ft	P	M	D	X
NEW	27056810	\$489,900	05091	310 BEECH DALY RD Style: B=COLONIAL	3	3.1	B	2890				

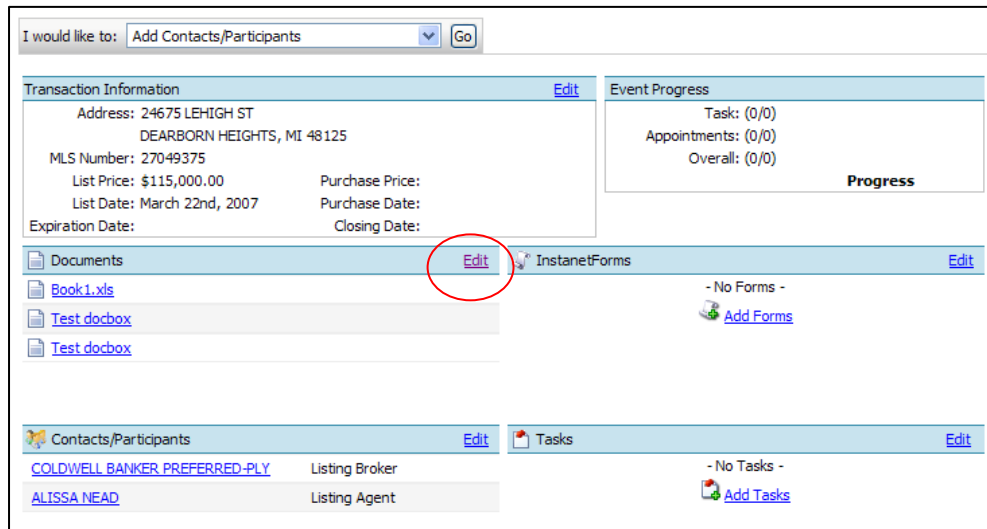
A "View Documents" link will be added below the photo on the flyers, next to the virtual tour link if applicable, to allow users to view the documents.



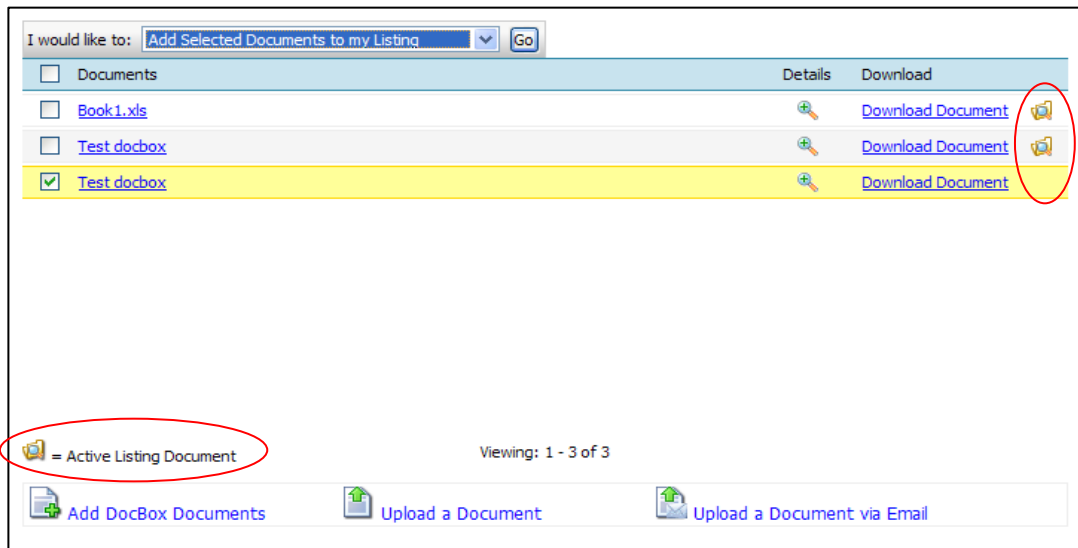
A "View Documents" link will also be added to the Listing Detail screen in Listing Manager.

Manage Listing						
Reverse Prospects	Adjust Map Location	Listing Load	Start Transaction	View Documents	Email Listing	Back to List

Now that you have seen how to view documents on listings once they have been upload, it's time to upload your disclosures and other documents to your listings. You have to have already set up transactions for the listings and attached the desired documents to that transaction. Click **Work with Existing Transactions** on the homepage. Click the link for the desired transaction. Click the Edit link on the Documents section.



You'll see by the icons on the far right which documents are already viewable on your listing in Realcomp Online[®]. The icon key is at the bottom of the page.



To add an additional document to your listing, click the checkbox to the left of the document name, select Add Selected Documents to my Listing from the “I would like to:” drop down list and click **Go**. The page will refresh and the icon will appear to the right of that document. Your document will now be attached to your listing in Realcomp *Online*[®].

To remove documents from being viewable on your listings, click the checkbox to the left of the document name, select Remove Selected Documents from my Listing from the “I would like to:” drop down list and click **Go**. The page will refresh and the icon will no longer appear to the right of that document.

Calendar/Appointments

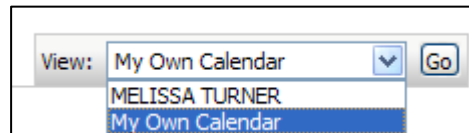
The calendar allows you to view your Transaction Desk calendar or the calendar of anyone that has shared their calendar with you. Only appointments set up within the calendar itself will show up on the calendar. Tasks set up in from within Transactions do **NOT** show up on the calendar.

The available calendar views are day, week, month, 3 months, and year.

You can add appointments by selecting Add Appointment from the “I would like to:” drop down list and clicking **Go**. Fill in the desired information and click **Save Appointment** when finished.

The screenshot shows a web form titled "General Appointment Information". It contains several sections: "Appointment Name" (text input), "Appointment Type" (dropdown menu with "Add Appointment Type" link), "Start Date/Time" and "End Date/Time" (datetime pickers), an "Appointment lasts all day" checkbox, "Location" and "Website" (text inputs), and "Notes" (text area). Below this is the "Reminders" section with "Email" and "Text Message" dropdowns. The "Assignees" section has two lists: "Available Assignees" (including APRIL MCKAIN, CHAD CALDWELL, ELIYA GLADSHTEYN, FRANK GREEN, JANENE GARDNER, JULIE FISHER, KALYANI MANTRIPRAGADA, Kay Day, Kim Koonec, Lance Campbell) and "Assignees" (currently containing TAMI CUMMINGS), with "Add >>" and "<< Remove" buttons. The "Notifications" section has checkboxes for "Notify assigned members immediately via email" and "Notify owner upon status change of this Appointment". The "Recurrence" section has radio buttons for "Does not recur", "Recur" (with "Every" and "Day" dropdowns), and "Recur on the" (with "First" and "Sunday" dropdowns and "of each month" text), plus a "Recur until" date picker and a note "Leave blank to have Appointment continually recur.". At the bottom are "Save Appointment" and "Cancel" buttons.

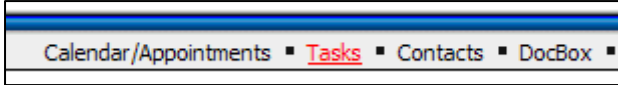
If another TransactionDesk user has shared their calendar with you, you can change from your calendar to theirs using the drop down list in the upper right corner of the calendar. Click **Go** once you have made your selection.



You can share your calendar with another Transaction Desk user by selecting Share my Calendar from the “I would like to:” drop down list and clicking **Go**. You can only share your calendar with those that you have set up as Shares. If the desired person is not in the drop down list, you can set them up in Settings>Sharing.

Tasks

You can access a view of all of your tasks, for all transactions, by clicking the Tasks link at the top of the page.



This will display a sortable/filterable list of your tasks. From this list you can use the “I would like to:” list to:

- Add a New Task
- Add a New Task to an Open Transaction
- Delete Selected Tasks
- Export Selected Tasks to Outlook
- Mark Selected Tasks as Completed
- Mark Selected Tasks as Open

A screenshot of the task list interface. At the top, there are filter controls: 'Show: All Tasks', 'Type: - None -', 'Sort By: Due Date', and 'Status: All'. A 'Filter Tasks' button is below these. Below the filters is a section 'I would like to:' with a dropdown menu set to 'Add a New Task' and a 'Go' button. The main part of the screenshot is a table with the following columns: 'Tasks', 'Transaction', 'Due Date', 'Status', and 'Details'. The table contains five rows of task data.

Tasks	Transaction	Due Date	Status	Details
<input type="checkbox"/> My Task 2	Test-Import MLS#		Open	
<input type="checkbox"/> My Task 2	857 S CASS LAKE RD		Open	
<input type="checkbox"/> Testing tasks		7/31/2007 1:00:00 PM	Past Due	
<input type="checkbox"/> test for main st	109 MAIN ST	8/6/2007	Past Due	
<input type="checkbox"/> Test	47675 NORTON CT	8/7/2007 12:00:00 PM	Past Due	

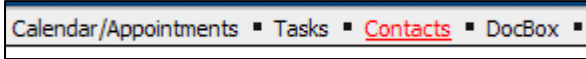
You can click the link at the task’s name to edit the task. You can also click the magnifying glass in the Details column to the right. This gives you information such as who assigned you the task, if it isn’t from a transaction that you started.

A screenshot of the task details view. At the top, there is a section 'I would like to:' with a dropdown menu set to 'Add New Task' and a 'Go' button. Below this is a table with columns: 'Tasks', 'Due Date', 'Status', and 'Details'. The first row shows a task named 'Office Task 1' with a due date of 8/7/2007 and a status of Past Due. A magnifying glass icon is in the Details column. Below the table is a light blue box containing the following information:

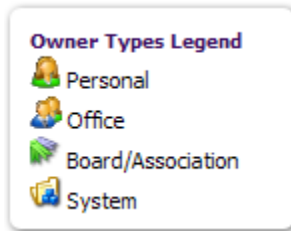
Name: Office Task 1	Task Type: - None -
Created By: TAMI CUMMINGS	
Due Date: 8/7/2007	
Assignees: TAMI CUMMINGS	
Date Created: 8/17/2007 11:43:12 AM - EST	Last Modified: 8/21/2007 1:42:37 PM - EST
Notes:	

Contacts

The contact manager can be accessed by clicking Contacts at the top of the page.



It is advised that you add all of your contacts into the TransactionDesk Contacts as soon as possible. This way you have access to them in any transaction. They can, however, be added as they come up through Step 4 of the Transaction Wizard (see page 9). Contacts can be imported and exported to share with Outlook. If offices have “preferred vendors” for various services, the broker (or other office Super User) can set up those contacts and share with the rest of the office. Each contact has an icon next which shows where it originated.



If you have a long list of contacts you can sort and/or filter the list using the “Show:”, “Sort by:” and “Type” drop down lists. Click **Go** once you have made your selections.



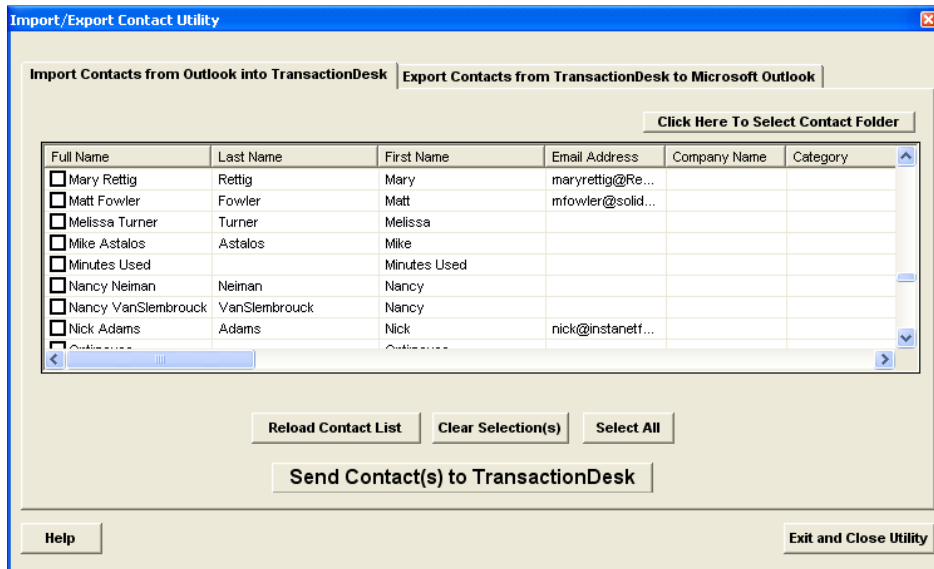
Add a New Contact

Select Add a New Contact from the “I would like to:” drop down list and click **Go**. Complete the desired information and click **Save Contact**. The next time you start a new transaction or edit an existing one, this contact will be available.

Import/Export Utility

Select Import/Export Utility from the “I would like to:” drop down list and click **Go** to share your contacts with your Outlook address book. When this is selected, you will be prompted to allow an ActiveX control called “OutlookUpload.CAB”. Click the message and select “Install ActiveX control...” from the menu. Click **Install** on any popup messages that appear. Read the terms and conditions and select I agree, if you accept them. Click **Start Import/Export Contact Utility**. If you do not accept them, you will not be able to use the import/export utility.

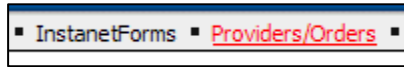
When the contact utility begins, place a check next to the names that you want to import into Transaction Desk™.



When finished, click **Send Contacts to Transaction Desk**. When the import is complete, click **OK** on the “Import Finished” pop up window. Click **Exit and Close Utility** when done. Click Return to Previous Page link on the license agreement page.

Providers/Orders

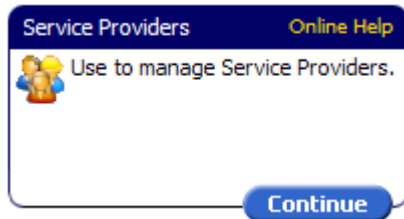
To begin using Providers/Orders click the Providers/Orders link at the top of the page.



You then have the option of two Wizards. One wizard is to manage Service Providers and the other is to manage Service Orders.

Service Providers

To begin the Service Providers wizard, click **Continue** in the Service Providers box.

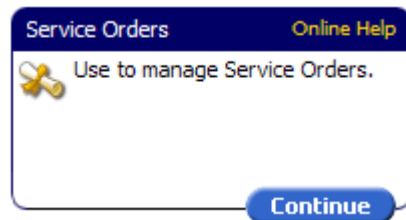


The sorting and filters as well as the contact types are the same as are used in Contacts (see page 43).

To add a new provider, select Add New Provider from the “I would like to:” drop down list and click **Go**. Fill in the desired information and click **Save Provider** button when finished. In the beginning you will need to add Service Provider Types until you have all of the desired types in the list. Examples of Service Provider Types would be inspector, mortgage company, title insurance, etc.

Service Orders

To begin the Service Orders wizard, click **Continue** in the Service Orders box.



You will first be taken to the service order manager. This report can be sorted/filtered by “Show:”, “Sort by:”, “Type:” and “Status:”.



In the beginning the only option in the “I would like to:” drop down list is Create New Order. Click **Go** to begin the wizard. Service orders are a five step process and the wizard will walk you through all steps.

Step 1 – Start Service Order

Select the transaction to which this order applies and select the type of order that you are placing. If the desired type is not in the drop down list, click the Add Service Order Type link to add a custom type. Click **Next** when finished with this step.

Choose Transaction & Order Type

Transaction: 19774 ELKHART ST
Select one of your Transactions.

Order Type: Home Inspection
[Add Service Order Type](#)

Step 2 – Select Provider

Use filters or sorting, if desired to find the correct provider. Click the Select Provider link to the left of the provider's name.

Select Provider

Show: My Own Providers Sort By: First Name - Descending Type: --- Custom Types --- Go

	Name	Company	Type
Select Provider	Kurt Ladendorf	House to Home	Inspector
Select Provider	Ray Cummings		Inspector

Step 3 – Enter Order Details

Complete the order form.

- Select any Participants that should have access to this information
- Select any details about the property that the provider may need
- Select the desired date and time, if any, when you would like to have the service performed
- Add any notes in the Additional Info field
- Click **Save** when finished
- Click **Next** after saving

I would like to:

General

Order Date: Tuesday, August 21, 2007 05:29 PM - EST
 Order Type: Home Inspection
 Ordering Agent: TAMI CUMMINGS

<input type="checkbox"/>	Participant	Company	Type
<input type="checkbox"/>	RIVERPOINTE REALTY CO, INC	RIVERPOINTE REALTY CO, INC	Listing Broker
<input type="checkbox"/>	TAMARA SMITH	No Company Name Available	Listing Agent
<input checked="" type="checkbox"/>	TAMI CUMMINGS	No Company Name Available	Selling Agent
<input checked="" type="checkbox"/>	REALCOMP II LTD. MLS	REALCOMP II LTD. MLS	Selling Broker
<input checked="" type="checkbox"/>	Rob Cummings	Rob Cummings	Buyer

Participants:

Request Date/Time: Requested Date: 08/30/2007 12 AM :00 Requested any time on this date
 No Request Date

Order Details:

Name:	Value:	
MLSNumber	27015616	<input checked="" type="checkbox"/>
StreetNumber	19774	<input checked="" type="checkbox"/>
StreetName	ELKHART ST	<input checked="" type="checkbox"/>
City	HARPER WOODS	<input checked="" type="checkbox"/>
- Add New Detail -		

Order Details Legend

= Change Detail Name/Value
 = Delete Detail

Additional Info: (max 400 chars.)

I would like to:

Step 4 – Attach Documents

You can attach any documents from the DocBox or Instanet Forms or you can Upload a Document from your computer. This may include the company’s own order forms, any disclosures or any other forms that the provider may need. Once you have uploaded the documents, if any, click **Next**.

Step 5 – Choose Delivery Options

This order can be delivered by email/fax or you can print it to deliver it by other methods. Be sure that your provider is prepared to accept your orders in the selected method.

Check “Yes” to include a Fax-Back cover sheet and when the service is complete the provider can fax it back to you directly to your TransactionDesk™ account. Include a cover sheet header and message, if desired.

Verify the recipients and add any other recipients, if needed.

Click **Save**.

The screenshot shows a web form titled "Choose Delivery Options". At the top, there are "BACK" and "NEXT" navigation buttons. Below the title, there is a "Save" button. The form is divided into several sections:

- Method of Delivery:** Three radio buttons are present: "Email" (unselected), "Print" (selected), and "Fax" (unselected).
- Cover Sheet Options:** A checkbox labeled "Include Fax-Back Cover Sheet?" is checked, with the text "Yes, include cover sheet" next to it. Below this are two text input fields: "Cover Sheet Header: (max 250 chars.)" and "Cover Sheet Message:".
- Additional Recipients:** A table with two columns: "Name" and "Address". The first row shows "Kurt Ladendorf" and "kurt@ladendorf.com". A link "- Add New Recipient -" is located below the table.
- Recipients Legend:** A section with two items: a pencil icon for "= Change Recipient Name/Address" and a red 'x' icon for "= Delete Recipient".

At the bottom of the form, there is another "Save" button.

Click **Next** when finished.

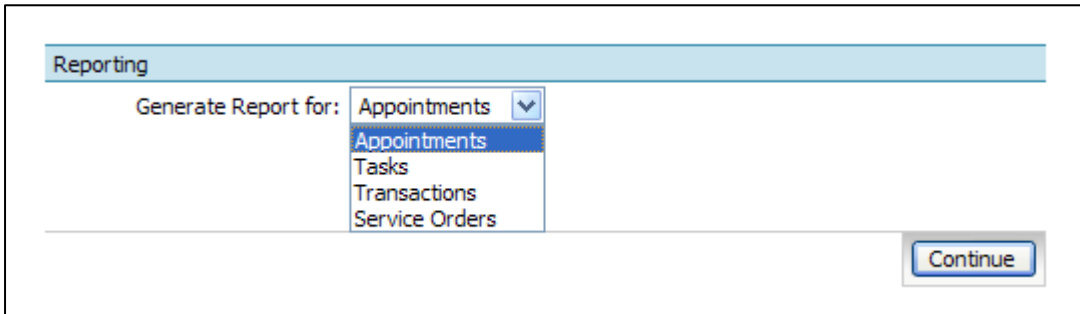
You then have a chance to Review the Order and email, fax or print (whichever was selected as the method of delivery).

Reports

To begin using Reports click the Reports link at the top of the page.



You can generate reports for Appointments, Tasks, Transactions and Service Orders. Select the desired report and click **Continue**.

A web form titled "Reporting" with a light blue header. Below the header, the text "Generate Report for:" is followed by a dropdown menu. The dropdown menu is open, showing four options: "Appointments" (highlighted in blue), "Tasks", "Transactions", and "Service Orders". To the right of the form is a "Continue" button.

Signings

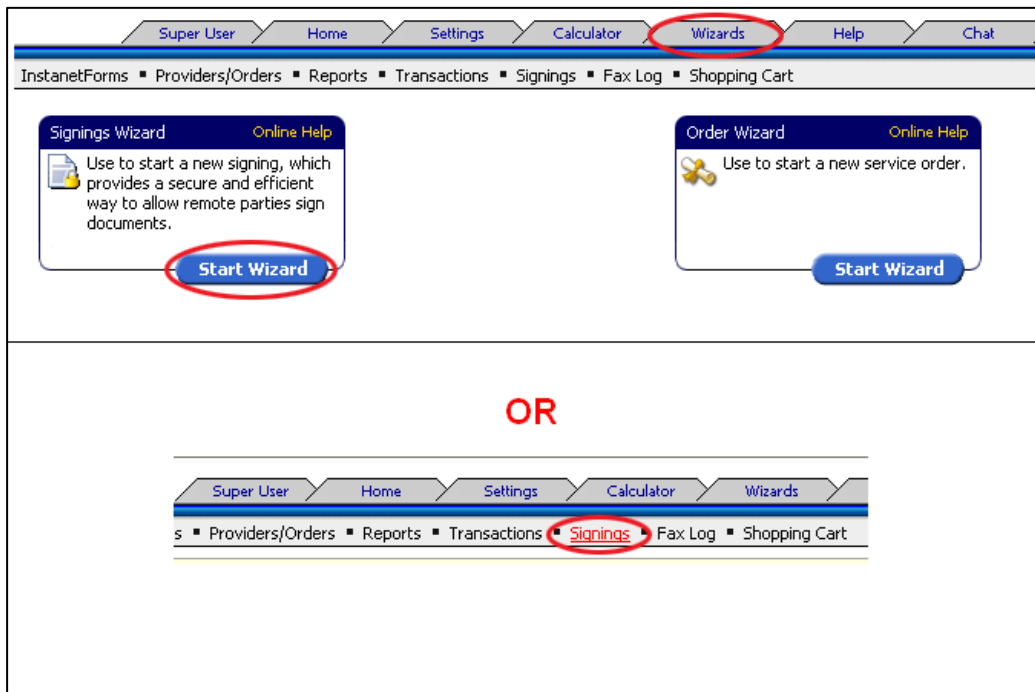
Preparing the Signing

To begin using Signings click the Signings link at the top of the page.



The AuthentiSign™ Service is a secure browser based on-line document signing service enabling multiple parties to participate and sign documents on-line. This is an additional feature available in TransactionDesk™ that is **NOT** included with your transaction management account, and will need to be purchased directly from Instanet through the “Shopping Cart” in TransactionDesk™.

All of the documents signed on-line are protected using the trusted **United States Postal Service Electronic Postmark (USPS EPM)**. The **USPS Electronic Postmark™ (EPM)** protects the integrity of your electronic data through the use of time stamps and digital signatures. Through the **USPS EPM** web-based service, any third-party can verify the authenticity of electronic content. This electronic proof, postmarked by the Postal Service, provides evidence to support the authenticity of electronic transactions. Evidence of content authenticity is stored in the **USPS EPM** repository for seven years. **USPS EPMs** are included with signings purchased from Instanet or can be purchased separately from Instanet. The **USPS EPM** service supports applications so that they can comply with the **ESIGN** legislation (June 2000) which made electronic signatures a legally viable option for conducting business.



Step 1 – Choose a Signing Name

Type a name to identify this signing and click **Next** when finished.



The screenshot shows the Authentisign web interface for Step 1. At the top center is the Authentisign logo. Below it, the text 'Choose a Signing Name' is displayed. On the right side, there is a blue 'NEXT' button. In the center, there is an information icon (i) followed by the text 'Signing Name: [Test Signing]' and a text input field containing 'Test Signing'. Below this, a note states: '(The Signing Name is used to identify the signing and is displayed in emails sent to the various participants.)'. At the bottom, there is a copyright notice: 'Copyright © 2007 Instant Solutions. All rights reserved.' and three links: '[Contact Us]', '[Help]', and '[Online Chat]'.

Step 2 – Signing Details and Security

Make your selections for Postmark Option, Email Option and Signing Security.

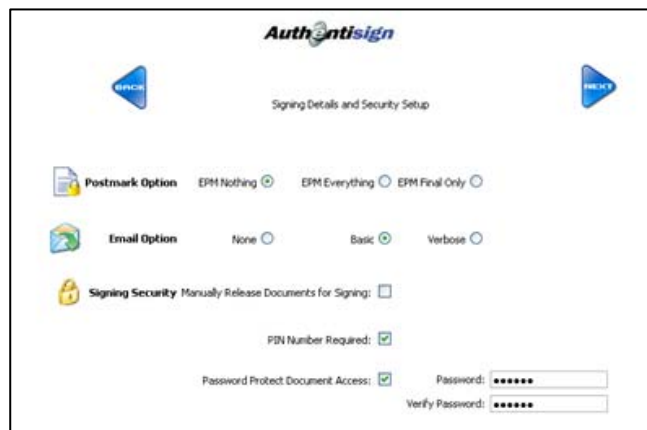
➤ *Email Option*

- **None:** Email notifications sent to the creator once it has been signed.
- **Basic:** Key steps taken in the signing will be emailed to the creator.
- **Verbose:** Every single step taken in the signing will send an email notification to the creator of the signing.

➤ *Security*

- Documents can be encrypted with security password.
- If you select **Manually Release Documents For Signing** you will have to send the document yourself to the participants to be signed.

If you select to have a PIN number required, then the client will need to talk to you to get that PIN number. Select a password to password protect the document itself, if desired. Click **Next** when finished.



The screenshot shows the Authentisign web interface for Step 2. At the top center is the Authentisign logo. Below it, the text 'Signing Details and Security Setup' is displayed. On the left and right sides, there are blue 'PREVIOUS' and 'NEXT' buttons respectively. The screen is divided into three sections: 'Postmark Option' with radio buttons for 'EPM Nothing' (selected), 'EPM Everything', and 'EPM Final Only'; 'Email Option' with radio buttons for 'None', 'Basic' (selected), and 'Verbose'; and 'Signing Security' with a checkbox for 'Manually Release Documents for Signing' (unchecked). Below this, there are two checked checkboxes: 'PIN Number Required' and 'Password Protect Document Access'. At the bottom right, there are two password input fields labeled 'Password:' and 'Verify Password:', both containing masked characters (dots).

Step 3 – Select Signing Participants

Add yourself and/ or any additional parties. You can select from contacts or manually add participant information here. Click **Next** when finished.

Authentisign

Select Signing Parties

Selected Signers:

Signing Participants	Email	Signing Order
<input type="checkbox"/> Melissa Turner	mturner@corp.realcomp.com	1
<input type="checkbox"/> Laura Moore	mturner@corp.realcomp.com	2

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[Contact Us] [Help] [Online Chat]

Step 4 – Select Signing Document

Documents can be uploaded from your computer, faxed in, emailed in, or selected from your DocBox/Instanet forms. Click **Next** when finished.

Authentisign

Select Signing Document

The following document has been selected:
(InstanetForms) Listing Form - Residential / Site Condo

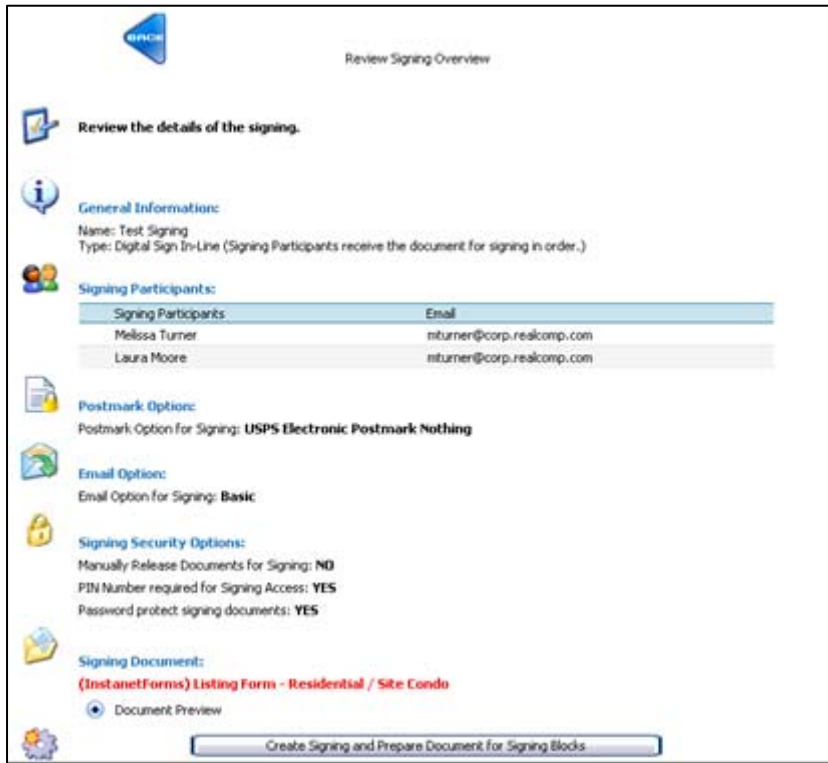
I would like to:

Copy to:

[Contact Us] [Help] [Online Chat]

Step 5 – Review Signing Overview

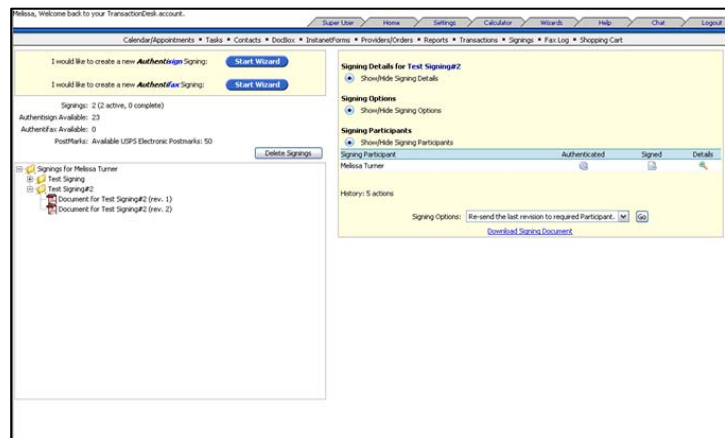
Review the details of your signing and click **Create Signing and Prepare Document for Signing Blocks** when satisfied.



Move the “Sign Here” indicator to the desired signing location.



Once the signing location is accepted you will be taken to the signings manager.



Completing the signing

- The participants in the signing receive an email inviting them to update their log-in information for the signing.
- They are provided with a log-in ID and password that must be changed prior to the signing.
- They must contact the creator of the signing to obtain the PIN number.



AuthenticSign Signing Participant

Username:

Password:

PIN:

[Click here](#) for the preflight system check.

Step 1 – Create Login Information

The signer creates their own login information including a new user name and password.



STEP 1: Create your own unique login information.

Current User Name:

New User Name:

Current Password:

New Password:

Confirm New Password:

Step 2 – Confirm your contact information

Be sure that all contact information is correct.



STEP 2: Confirm your contact information for all fields below.

Full Name: Laura Miller

Initials: LM

Address:

City:

State:

Zipcode:

Country: USA


Email:

Phone:

Fax:

Step 3 - Select a font

Select a font with which you would like your signature to display on the documents.



STEP 3: Select the Font style to be used for your.

Signature Initial Example

Signature Initial Example

Signature Initial Example

Signature Initial Example

Signature Initial Example

Step 4 – Read and Accept the Terms of Service

Check the appropriate checkbox.

Sign the document

- The pre-flight system check will run first and you will need to choose “continue”.
- The signer only needs to click where it says “click to sign” and then click “accept document” to complete the signing.

G. 30' SIDEWALKS H. RAISED RANCH I. MANUFACTURED W/CEED J. HISTORIC K. TO DUPLEX WITH LAND L. MODULAR HOME M. CONSTRUCTION FEATURES N. SITE CONDO O. NEW CONSTRUCTION P. MODEL FOR SALE Q. MODEL-NOT FOR SALE R. PLATTED SUB S. STYLE T. RANCH U. COLONIAL V. CARE CDD W. BUNGALOW X. TUDOR Y. TEMPORARY Z. SPLIT LEVEL AA. VICTORIAN AB. OTHER AC. SITE DESC AD. IRREGULAR AE. CONT. NEXT COLUMN	H. BOAT FACILITY I. SEA WALL J. TERMS OFFERRED K. CONVENTIONAL L. LAND CONTRACT M. FWA N. D. VA O. CASH P. SIMPLE ASSUMP. Q. ASSUMP-LEND APP. R. COM. BLEND RT S. LEASE T. TRADE-EXCHANGE U. PUR. MONEY MTL. V. AUCTION W. HEATING X. FORCED AIR Y. BASEBOARD Z. HOT WATER AA. STEAM AB. GRAVITY AC. RADIANT AD. HEAT PUMP AE. SPACE HEATER AF. FLOOR FURNACE AG. ZONED AH. OTHER	E. 2x WALL AC F. CEILING FAN G. 2x CEILING FANS H. ATTIC FAN I. WATER HEATER J. A. GAS K. B. ELECTRIC L. C. OIL M. D. LP GAS N. E. SOLAR O. F. GEO-THERMAL P. I. PROPANE Q. J. HEAT PUMP R. FIREPLACE S. A. LIVING ROOM T. B. GREAT ROOM U. C. FAMILY ROOM V. D. DINING ROOM W. E. MASTER BEDROOM X. F. BASEMENT Y. G. NATURAL Z. H. GAS AA. I. WOOD STOVE AB. J. OTHER AC. CONT. NEXT COLUMN	J. DISPOSAL K. OTHER L. GARAGE M. A. 1 CAR N. B. 2 CAR O. C. 3 CAR P. D. 3+ CAR Q. E. ATTACHED R. F. DETACHED S. G. CARPORT T. H. SIDE ENTRY GARAGE U. I. DIRECT ACCESS V. J. DOOR OPENER W. K. HEATED X. L. ELECTRICITY Y. M. WORKSHOP Z. N. SECOND GARAGE AA. FOUNDATION AB. A. BASEMENT AC. B. C. D.	I. ARENA J. COMP ARRANGE K. A. BRICK L. B. DUAL M. C. VARIABLE N. D. EXCLUSION O. EXTERIOR FEAT P. A. DISABLED ACCESS Q. B. POOL-INGROUND R. C. POOL-REV. GROUND S. D. PATIO T. E. DECK U. F. PORCH V. G. SPRINKLER W. H. SHED X. I. BBQ GRILL Y. J. FENCED Z. K. OUTSIDE LIGHTS AA. L. CABANA AB. M. COMMON POOL AC. N. TENNIS COURT AD. O. CLUB HOUSE AE. P. GATE HOUSE AF. Q. GROUND MAINTENANCE AG. R. SPA/HOT TUB AH. S. SATELLITE DISH (Ranch/Urban Excepted)	J. ACCESS K. APPOINTMENT L. B. KEY M. C. LOCKBOX N. D. APPT KEY O. E. APPT LOCKBOX P. OTHER FEATURES Q. A. LENDER OWNED/FORECLOSURE R. B. AS IS S. C. COSP EXCLU T. D. INVESTMENT U. E. APOD AVAILABLE V. F. EXCLUSIONS W. G. HOME WARRANTY X. ENVIRONMENTAL Y. A. BROWN FIELD Z. B. EPA PHASE I AA. C. EPA PHASE II AB. D. WETLAND AC. E. UNDERGROUND STORAGE TANK AD. F. INSPECTION RECD. AE. G. OTHER
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*THE PROFILE SHEET IS AN INTEGRAL PART OF A LEGAL CONTRACT. I CERTIFY THAT A CONTRACT HAS BEEN EXECUTED ON SUBJECT PROPERTY AUTHORIZING DISSEMINATION TO AUTHORIZED MLS PARTICIPANTS.

LISTING OFFICER: *Melissa Turner* (S) / DATE: _____ / PHONE NO.: _____

X _____ (S) / DATE: _____ / _____ (S) / DATE: _____

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Final Revision

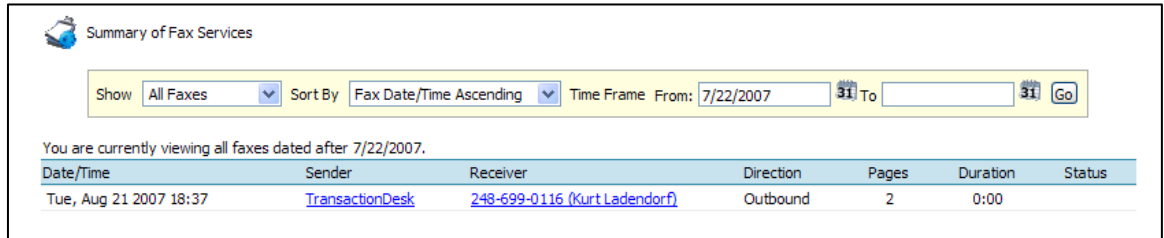
- Participants are notified to sign one at a time.
- Once all parties have signed, both parties will receive an email that contains a final revision document which details each step of the signing.

Fax Log

To begin using the Fax Log click the Fax Log link at the top of the page.



The Fax Log allows you to sort and filter using Show, Sort By and Time Frame criteria. All faxes will be displayed in the table shown below.



Summary of Fax Services

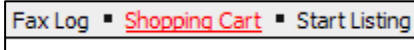
Show All Faxes Sort By Fax Date/Time Ascending Time Frame From: 7/22/2007 To: [] Go

You are currently viewing all faxes dated after 7/22/2007.

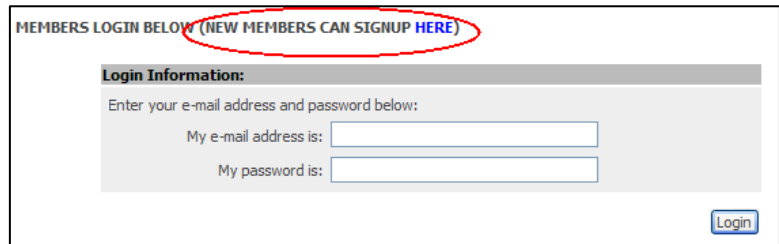
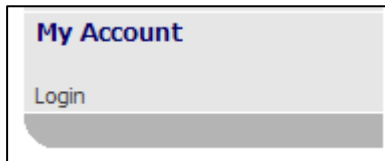
Date/Time	Sender	Receiver	Direction	Pages	Duration	Status
Tue, Aug 21 2007 18:37	TransactionDesk	248-699-0116 (Kurt Ladendorf)	Outbound	2	0:00	

Shopping Cart

To begin using the Shopping Cart click the Shopping Cart link at the top of the page.



From the Shopping Cart you can order Electronic Postmarks and Digital Signatures. Before using the Shopping Cart for the first time you will need to register. Use the Login link under My Account and click the "Here" link to register.



Complete the form entering Account & Contact Info, Billing Info, and Shipping Info. Click Create Account when finished.

Using the Categories item on the left, you can select the item that you wish to purchase. Keep in mind that not all of the items will apply to Realcomp's system. If you have questions, please contact Customer Care before completing any purchases.