

“No Limits” Fax & Document Storage Service Instruction Manual

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 fax and document storage 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.

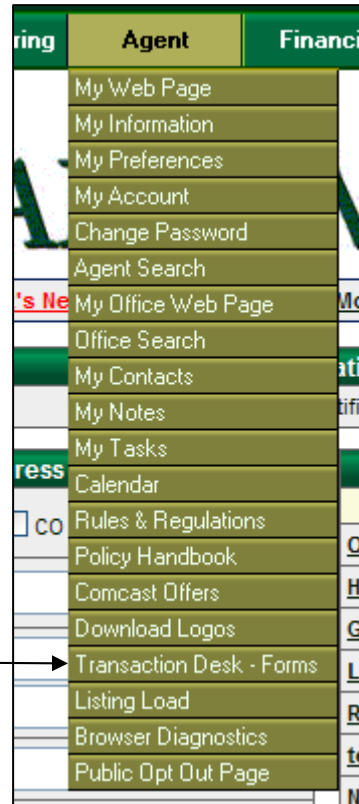


Figure 1

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

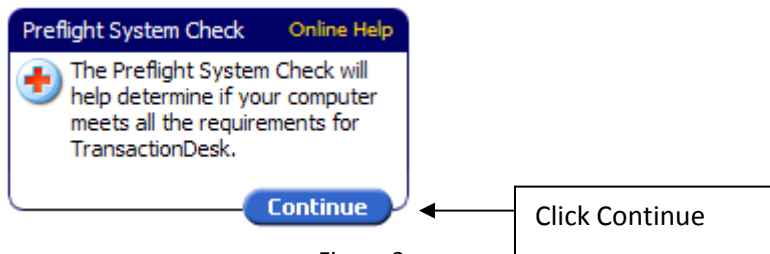


Figure 3

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 Instanet 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).

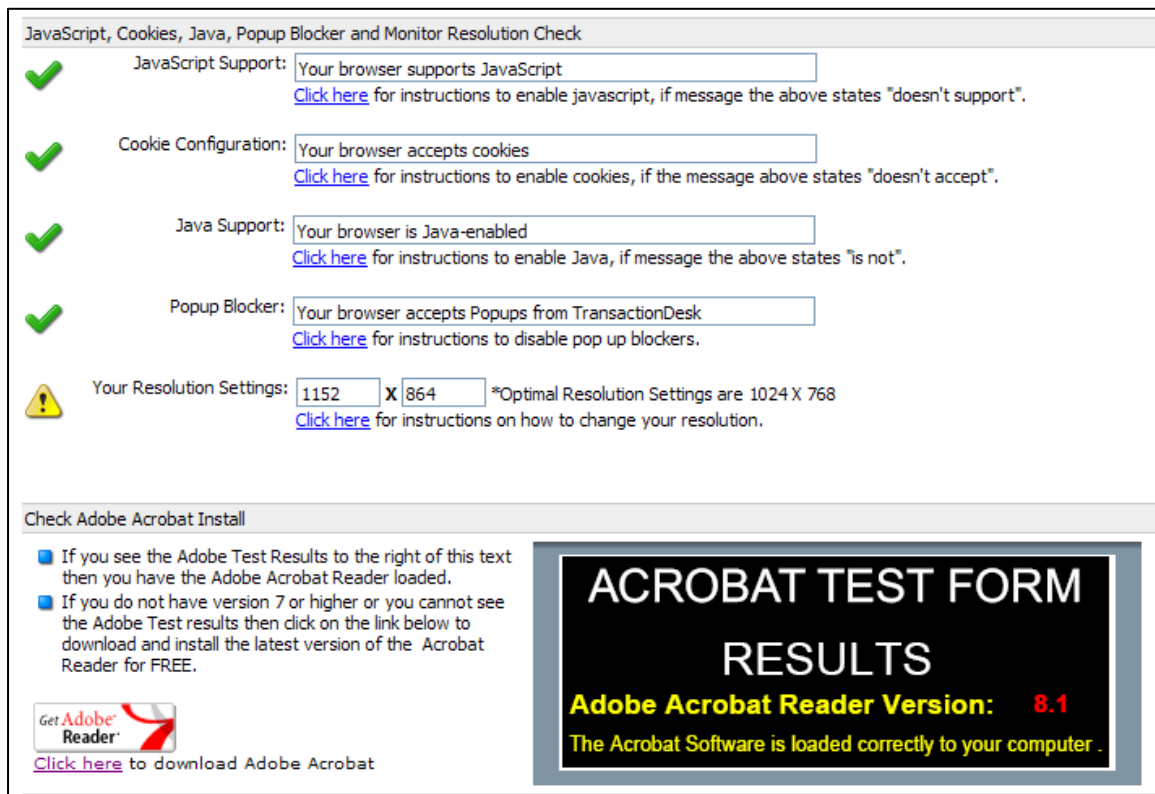
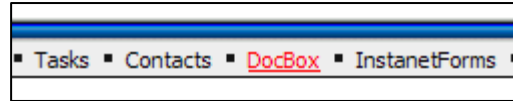


Figure 4

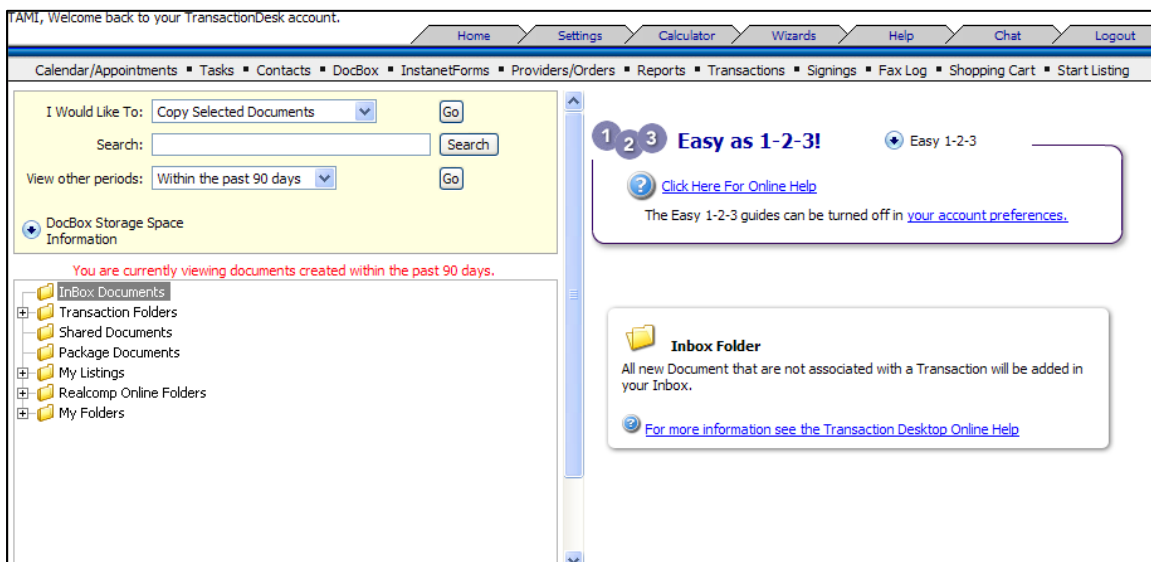
When all tests are complete and all failed items have been resolved, you can click on **Settings** and **My Preferences** to do some additional selections, **Settings** and **Quick Start Groups** to group forms together into packages for future use or click the **Home** tab at the top of the page to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

Online Document Storage and Faxing

The online document storage section of Transaction Desk is called the **DocBox**. With the “No Limits” Fax and Document Storage subscription, you have unlimited document storage in the DocBox. The DocBox can be accessed by clicking on the DocBox link at the top of the Transaction Desk 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 with 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.

From that online storage, you can electronically fax documents to your clients and receive documents via fax in an electronic format.

Uploading Documents to the DocBox

The first step in using the DocBox is to upload a document. There are three ways that a document can be added to the DocBox.

1. Upload a document from your computer to your hard drive

If you already have the desired document on your hard drive you can select **Upload Document** from the “I would like to:” drop down list and click **Go**.

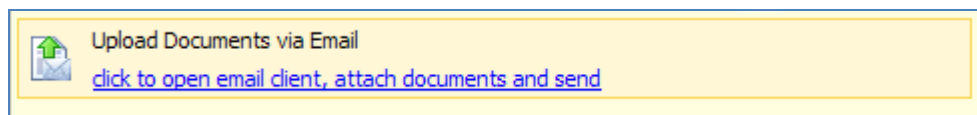
Uploading documents requires a 3rd party helper application. You will be prompted to accept it for installation the first time you use this feature, and any other times if you do not check the 'always accept' option on the prompt screen.

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, scroll to the bottom of the page and click the **Upload Document** button. When the upload process is complete, links will display to allow you to upload another document or return to the document manager (DocBox).

2. **Upload a document from your computer via email**

NOTE: In order to upload documents using this method, you MUST have an email program installed on your computer, such as Outlook or Outlook Express and not use only an online email service.

Uploading multiple documents can be very time-consuming since you can only upload one at a time through the previous method. If you want to upload multiple documents it is much faster to do so via email. Select **Upload Documents via Email** from the "I would like to:" drop down list and click **Go**. Once you have done this a message will appear below the drop down fields with a link to click to open your email client and continue. Click the link.



An email message from your email program will open. The "To:" field and the Subject will already be filled in for you. **DO NOT CHANGE ANY OF THE PREFILLED 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 the DocBox (allowing at least a few minutes for the delivery), the emailed document(s) will be available in the folder entitled “InBox Documents”.

3. **Uploading documents that you only have in paper (hard copy) format**

If you only have the document in a paper (hard copy) format, such as forms that have already been signed, you can fax those into your DocBox and then they will be available electronically. This method is similar to scanning the document but is much faster and doesn't require a separate scanner. You simply print a special cover sheet, called a Fax-Back Cover Sheet, to use as your cover sheet when faxing.

To print a cover sheet select **Create a Fax-Back Cover Sheet** from the “I would like to:” drop down list in the DocBox and click **Go**. If you are printing this for your own use, you don't need to fill in any of the fields on the page and you can uncheck the box “Send Fax-Back Cover sheet via Email?” to remove those fields. Scroll to the bottom of the page and click the **Create Fax-Back Cover Sheet** button.

You will be returned to the DocBox and there will be a link to click that opens the PDF file that contains the cover sheet. Click the link and click the print icon to print the cover sheet. This cover sheet should be printed on white paper with no other printing on it.

The cover sheet includes the phone number to which you need to fax the documents. Faxing to that phone number with the barcode that is included on the cover sheet will tell the system where to route these documents. The next time you access the DocBox (allowing at least a few minutes for the delivery), the emailed document(s) will be available in the folder entitled “InBox Documents”.

Once the document is uploaded to the DocBox you can fax or email the documents to your clients. Again, in order to email documents through Transaction Desk, you must have an email program such as Outlook or Outlook Express installed on your computer and not only use a web-based email program.

Faxing Documents from the DocBox

Faxing a document that has already been uploaded to the DocBox is very easy. Locate the document in the folders of the DocBox and click on the documents once to highlight them. Hold the Control (Ctrl) key to select multiple documents. Newly uploaded

documents may be in the InBox Documents folder. Select **Fax Selected Documents** from the “I would like to:” drop down list and click **Go**. (Example on next page)

I Would Like To: **Fax Selected Documents**

Search:

View other periods: **Within the past 90 days**

You are currently viewing documents created within the past 90 days.

- InBox Documents
 - (New) Open House Overview.docx [5/8/2008 1:21:20 PM - EST]**
- Transaction Folders
- Shared Documents
- Package Documents
- Realcomp Online Folders
- My Folders

The next page will ask for the fax information.

Fax Details

- Enter the recipient’s name and fax number.

Cover Sheet Options

- If this is a document that will need to be signed and returned, leave the box checked to include a Fax-Back Cover Sheet.
- By default the system will send this returned document to your email address when it is received by the system. Uncheck “Please notify me when this fax is returned” if you do not want that.

Click **Send Fax** when finished.

When the recipient faxes the document(s) back to you, they simply need to use the Fax-Back cover sheet as the top page and the documents will be delivered to your DocBox as well as your email.

Faxing hard copies to clients with a Fax-Back cover sheet for return

Documents that you have as a hard copy (paper copy) can also be faxed to clients for information, such as a signature, and faxed back to your DocBox. Simply print a Fax-Back cover sheet and include it with your documents to be completed and faxed back. Advise the client to use the Fax-Back cover sheet as their top page when they send it back. When the documents are

faxed back to you, they will be waiting for you in your DocBox Inbox, and you will receive an email notification of the fax with the faxed documents attached.