



## INSTANET FORMS OR TRANSACTION MANAGEMENT

**BOTH ARE AVAILABLE UNDER THE 'TRANSACTION DESK' PROGRAM,  
FIND OUT WHICH OFFERING IS RIGHT FOR YOU!**

* Features Common to <u>BOTH</u>	Instanet Forms <i>(included in MLS Subscription)</i>	Transaction Management <i>(\$18 per quarter)</i>
Amortization Calculator	■	■
Attaching Documents to Listings	■	■
AuthentiSign – Online E-Signings (*additional charge) • USPS Electronic Postmarks (USPS EPM)	■	■
Branding	■	■
Contacts (Add new or import from Microsoft Outlook)	■	■
DocBox Print Driver	■	■
DocBox2Go	■	■
Emailing (Documents & Forms)	■	■
Faxing/Fax Log (Send & Receive Unlimited Faxes)	■	■
Individual Forms	■	■
Online Document Storage (Unlimited Storage)	■	■
Online Help Info & Previously Recorded Webinars	■	■
Personal/System Clauses	■	■
Quick-Start Groups	■	■
Reports (Broker & Super User Accounts)	■	■
Super User Accounts (Office Administrative)	■	■
Transactions • Archiving • Call Logs • Sharing with Co-Workers • Transaction & Form History	■	■
Vanity Fax Numbers (*additional charge)	■	■
Wizards (built into application)	■	■
* Features <u>UNIQUE</u> to Transaction Management	Instanet Forms	Transaction Management
Activity Plans		■
Calendar/Appointments		■
Service Providers • Service Ordering		■
Tasks • Task Templates • Task & Appointment Reminders		■
Transaction Clients/Participants with Secure Login		■

*\* Feature descriptions follow.*

*Revised May, 2011*



## FEATURE DESCRIPTIONS

**Transaction Desk™** - Transaction Desk™ is the name of the online system used for both Instanet Forms and Transaction Management. All Realcomp subscribers have access to Instanet Forms through Transaction Desk, and those who choose to upgrade to a Transaction Management account will have additional features.

**Amortization Calculator**—The basic mortgage calculator includes an amortization schedule, similar to the one on Realcomp *Online*®.

**Archiving**—This feature enables users to package the forms that are attached to a transaction into a PDF format, so the final document can be saved and/or e-mailed. Transactions are automatically archived when deleted and a downloadable PDF will be emailed to the email address on file with Instanet Forms.

**Attaching Documents to Listings**—This feature enables users to attach transaction documents to their listings to make them available to other MLS Subscribers and users of Realcomp *Online*®. Documents can be attached to a listing through Listing Manager (in Realcomp *Online*®) or through Transaction Desk™.

**AuthentiSign™**—This feature can be purchased through the shopping cart feature of the application and is a secure browser-based on-line document signing service, which enables multiple parties to participate and sign documents on-line. AuthentiSign is the only digital signature solution for real estate that includes seven years of document protection via the US Postal Service Electronic Postmark (USPS EPM) service, and has been designed exclusively for real estate. USPS EPM service is web-based security service that dates and timestamps electronic documents and files, provides tamper detection, and enables on-line verification of content authenticity.

**Branding**—This feature enables users to brand their emails, faxes, and participant log in pages with their photo or office logo.

**Calendar/Appointments**—This feature enables users to add appointments to a calendar and view the calendar in a daily, weekly, and monthly formats. The calendar can then be added to the user's home page and shared with co-workers.

**Call Logs**—Call Logs - This feature enables users to log phone calls within a transaction to keep an accurate history with information such as name, date, time, along with any additional notes about the call.

**Contacts**—This feature enables users to store contact information for transaction participants, as well as other personal contacts, in the application. Contacts can be imported/exported with Microsoft Outlook.

**DocBox Print Driver**—This feature enables users to fax, email and/or upload files by virtually 'printing' them from any Windows application by clicking on "File", "Print" and selecting the "DocBox Printer" option.

**DocBox2Go**—This feature provides a document management mobile application for agents and brokers. With DocBox2Go real estate professionals can access all of their listings, sale and lease files from anywhere. Users can view their transactions, DocBox inbox and DocBox folders with any smart phone or other cell-phone that can access the internet.



**Emailing** – Many items can be emailed from the application, including forms. These e-mails are sent and tracked through the application.

**Faxing/Fax Log**—This feature enables users to send and receive unlimited faxes. The user can fax directly from the Instantet Fax print driver. Simply load your favorite program, select the Instantet Fax print driver and seamlessly send any document to virtually any fax machine or email address. View the faxes that you've sent and received via the Fax Log. The fax log tracks incoming and outgoing faxes with time and date stamps and it also displays receipt status.

**Individual Forms**—This feature includes over 150 available forms, including: Realcomp forms, Realcomp Shareholder Board & Association forms, Michigan Association of REALTORS® forms, Ann Arbor Board of REALTORS forms, and the forms of the office (if the Broker has chosen to include his/her forms in the application – conversion fees for the forms apply).

**Online Document Storage (Unlimited)** —This feature enables every user to upload and store an UNLIMITED number of documents in the application.

**Online Help Information and Previously Recorded Webinars** – Online help information is readily available throughout the application. Previously recorded webinars are also available for on-demand viewing by MLS Subscribers by visiting [http://www.transactiondesk.com/webinars/recorded\\_webinars.html](http://www.transactiondesk.com/webinars/recorded_webinars.html).

**Personal/System Clauses**—This feature enables users to easily insert custom clauses into their forms by adding them to a database and inserting them as needed. Personal clauses are those created by the user or Office/Broker. System clauses are added by Realcomp. An example of a clause that might appear on a form is “Listing agent to present all offers”.

**Quick-Start Groups**—This feature enables users to “package” commonly used forms together, so they can be inserted into a transaction as a group (rather than individually) which saves the user time and effort.

**Reports**—This feature enables Brokers and Super Users to run reports on the Transaction Desk™ activities of the agents in their office.

**Service Orders**—This feature enables users to request quotes or send service orders to saved service providers via fax or email.

**Service Providers** —This feature enables users to store commonly used service provider (mortgage companies, title companies, contractors, inspectors, appraisers, etc.) contact information in a separate contact database that can be used for sending service orders via fax, or email.

**Sharing with Co-Workers**—This feature enables users to share their transactions with one or more co-workers within their office. This feature is particularly beneficial to those who work in pairs or teams. Agents can also share their transactions with office staff so staff can manage or add information to the transactions. Sharing can be on a read, write, or read & write basis, per transaction.

**Super User (Office Management) Accounts**—This feature enables users with super user privileges to access the transactions of any agent in the office. They can also login to the application as any agent in the office and run reports on their Transaction Desk™ activities.



**Transaction & Form History**—All steps, changes, modifications, etc. are stored in transactions and forms.

**Transactions**—Transactions are the files that users create in which to store all of their transactional data.

**Tasks**—Tasks allow a user to store “to-do” items that relate to the transaction. Tasks can be assigned to anyone who participates in the transaction. Tasks can be exported to Microsoft Outlook.

**Task & Appointment Reminders**—Tasks and appointments include reminders that can be emailed and/or cell phone texted to the user (assigned participants only receive emailed reminders, not text messages).

**Task Templates & Activity Plans**—These features allow users to create common tasks and insert them into transactions where necessary. Activity plans are groups of task templates that can be inserted into transactions to create a workflow for the transaction. Brokers/Super Users can create activity plans for the entire office to use. There are pre-set activity plans that can be used as a guideline, or users can create their own.

**Transaction Clients/Participants with Secure Login**—This feature enables users to invite any contact into a transaction as a “participant”. This gives the contact access to any user-determined portion of the transaction where they can read, write, or read and write, as well as upload additional documents. They are emailed an invitation with a secure username and password (and/or PIN) that they can then use to access a mini-version of Transaction Desk™ to view transaction details and updates.

**Vanity Fax Numbers**—A vanity fax number is a personal local or toll free number a user can purchase directly from Instanet Solutions and put right on a business card and other marketing materials (i.e. website). The vanity fax number provides a similar service to eFax or other Internet faxing services with three distinct advantages; it costs less than competing services, it integrates with DocBox and Transaction Desk, and it always has unlimited faxing in and out-no overage fees.

**Wizards (built into application)**—This feature provides you with step-by-step instructions by asking you a series of questions or presenting options for accomplishing tasks within the software.