

Transaction Desk

TransactionDESK®



Instructor: Susan Barnette

Pre-Flight System Check

Pre-Flight System Check

Browser/OS Information

✓ **Browser:** MSIE 10.0
OS: Windows 7

Browser Settings

✓ **JavaScript Support:**
Your browser supports JavaScript

✓ **Cookie Support:**
Your browser accepts cookies

✓ **Popup Blocker:**
Your browser is accepting popups



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Welcome to Transaction Desk

Appointments, Events & Tasks

Appointments, Events and Tasks allows you to easily keep track of important dates and deadlines. Users can create individual Tasks and appointments or they can have them auto-generated when they start a new Transaction.

Audit Trails and Logging

The TransactionDesk service comes complete with full auditing capabilities. The auditing portion of the service covers access to the service, call logs, activity logs, incoming and outgoing fax and email logs. All of the edits and modifications made to each and every contract and form within the TransactionDesk is stored so a complete revision history is available if needed.

Auto-populate Contracts: Any contract or form can be auto-populated from MLS listing data, tax-roll data and/or previously populated transactions and forms. Negotiate On-line - Forms can be sent between parties and interactively negotiated and tracked on-line. A full audit trail of all changes and modifications are kept for each contract and form created in the service.

Calendars

The Calendar feature allows you to view your appointments, events & tasks in a calendar format. Any event, task or transaction activity is viewable in your own personal calendar. Users have the ability to share Calendars so they can be viewed by other TransactionDesk users in their work group, brokers or even clients. Calendars can be displayed in a number of different views from daily, weekly, monthly, 3 month and yearly views.

Clause Database: The clause database allows you to store information for commonly-used clauses and stipulations. The clauses can then be used in other TransactionDesk areas.

Contacts Database

The Contacts database allows you to store information for commonly-used parties such as agents, brokers and lawyers. This contact information can then be used to auto-populate transactions, contracts and forms. Contact Databases can even be shared between other TransactionDesk users within your office.

Digital Signature Capabilities

Signings is a part of the TransactionDesk service that allows users to securely manage the signing of documents by remote parties, while optionally providing the verifiable security of USPS Electronic Postmark® (USPS EPM®).

The USPS Electronic Postmark® (USPS EPM®) is a web-based security service that enables users to verify authenticity, provide tamper detection, and date and timestamp electronic documents and files. Evidence of content authenticity is stored in the USPS EPM repository for seven years to ensure trusted non-repudiation of content.

A Signing is a step-by-step procedure used to securely acquire signatures or alterations on any document in your account. All of the documents signed are protected from being altered by the US Postal Service Enforcement Branch. Users can feel secure in that all of the documents signed and secured within the TransactionDesk Service using the USPS EPM are protected by the following Federal Statutes:

1. 18 U.S.C. 1343 Wire Fraud.
2. 18 U.S.C. 2701 Electronic Communications Privacy Act (ECPA).
3. 18 U.S.C. 2510 Regarding electronic communications.

4. 18 U.S.C. 1028, Fraud and related activity in connection with identification and information.

Documents can be signed with either a digital certificate or by using the internet document faxing capabilities from within the Forms portion of the service.

Digital Signatures: Contracts and forms can be digitally signed, authenticated and protected by the US Postal Service's Electronic Postmark technology.

Dynamic Contract Management

Contracts and Forms provided by your real estate board/association/MLS can be dynamically created, modified and saved within your TransactionDesk account. Any contract or form can then be viewed, faxed or emailed by anyone you share them with. All contracts and forms created with the TransactionDesk service are in standard Adobe PDF format. Users are not required to download 3rd party proprietary software to view and edit forms.

Email Forms: Forms can be emailed in read-only or editable formats. As soon as the recipient receives a contract emailed through the TransactionDesk service the owner is sent an email notifying them the time and date that the contract was opened, any modifications made and even if the contract was printed. Users maintain full control of contracts sent abroad.

Email Reminders: TransactionDesk can also notify you by email of upcoming events or scheduled due dates.

Internet Faxing: Contracts can be sent via internet fax to clients for signing then digitally signed and distributed to both parties when approved. Users need not have a fax built into their computer as all documents are sent and received via the TransactionDesk internet fax service.

Multiple Fonts, color, sizes: Users have the ability to select from 14 different fonts, 10 colors and 8 font sizes when filling in and completing their contracts. Users are even able to use an auto-size feature that will shrink longer sentences to fit within the text input area on a contract.

Off-line Archiving: Forms can be archived and stored off-line and even imported into the CD-ROM based distributed version of the Forms software.

Popup Reminders: TransactionDesk can popup a reminder on screen of upcoming events or scheduled due dates.

Quick Start Groups: 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. Once created, your Quick-Start groups are visible in locations where you will add forms into a transaction.

Remote Viewing: Form Access Rights can enable a non-TransactionDesk user to view the form remotely, make changes and save to your TransactionDesk account.

Service Providers Database

The service providers database allows you to store information for commonly-used parties such as contractors, landscapers and plumbers. This contact information can then be used to auto-populate service request orders. Service Providers databases can even be shared between other TransactionDesk users within your office. You may encounter 'Affiliate' service providers supplied by your real estate board/association/MLS.

Sharing

Working with Others is the functionality TransactionDesk provides to integrate and share your information

with other users who also have a TransactionDesk account. This allows you to share any aspect of your TransactionDesk account with the people who need it the most. Users have the ability to edit the accessibility and viewing rights on any feature available within the TransactionDesk service.

Synchronize Events, Tasks and Contacts to Microsoft Outlook and Palm devices

The TransactionDesk service enables users to synchronize transaction data such as calendar events, tasks and contacts directly from their on-line transactions to their local Microsoft Outlook program or to their PDA. Selected event and contact information can even be sent to clients enabling them to track the transaction activity pertaining to their property sale from their own computer or PDA.

Task Templates

Task Templates are used to allow you to insert multiple tasks into a transaction with one click. The TransactionDesk provides default templates but users have the ability to create and modify their own templates.

Views & Invitations

The TransactionDesk service allows you to easily share information with Non-TransactionDesk users. Non-TransactionDesk users such as other agents, brokers, transaction coordinators, clients and 3rd party service providers can be given access to different views of the transaction data and associated contracts. Email based invitations are sent to alert external parties that a View has been made available. As external parties access the views, all activity including access time, date, location are recorded and tracked in the transaction audit facility.

Watermarks: Users have the ability to embed watermarks directly onto each page of their forms.

Wizards

The TransactionDesk service comes complete with easy to use Wizards that help expedite the process of starting new transactions, sending contracts for signing via fax and/or email, creating new Activity Plan used to automate the creation of transactions and the required tasks.

Home Page View

TransactionDESK Pro


Instant on Facebook
Like 4.3k

Welcome Susan Barnette | Log Out

Language: English Spanish Lite


Home Desktop Settings Calculator Help

Calendar | Tasks | Contacts | DocBox™ | InstantFax™ | InstantForms™ | Providers | Transactions | Authentisign™ | Fax Log




Start a New Transaction

Work with an Existing Transaction



Work with Forms Associated with Transactions

Work with Individual Forms



Work with DocBox Documents

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Desktop View

TransactionDESK Pro

Instant on Facebook
Like 4.3k

Welcome Susan Barnette | Log Out

Language: English Spanish Lite

Home Desktop Settings Calculator Help

Calendar | Tasks | Contacts | DocBox™ | InstantFax™ | InstantForms™ | Providers | Transactions | Authentisign™ | Fax Log

My Desktop

My Calendar

WEDNESDAY JANUARY 21ST, 2015

8 am

9 am

10 am

11 am

12 pm

1 pm

2 pm

3 pm

4 pm

5 pm

Continue

My Documents

Documents:

RF 714 Water Supply and Waste Disposal Notification

RF 712 Get a Home Inspection and Property Survey

RF 625 FHA IVA Addendum

RF 304 Disclaimer Notice

RF 401 Purchase and Sale Agreement

My Task List

Task Items: [0 Tasks]

No Tasks

Continue

My Transactions

Create New Transaction

Transactions

Test Cj

Test

Test

Us - Woodcrest

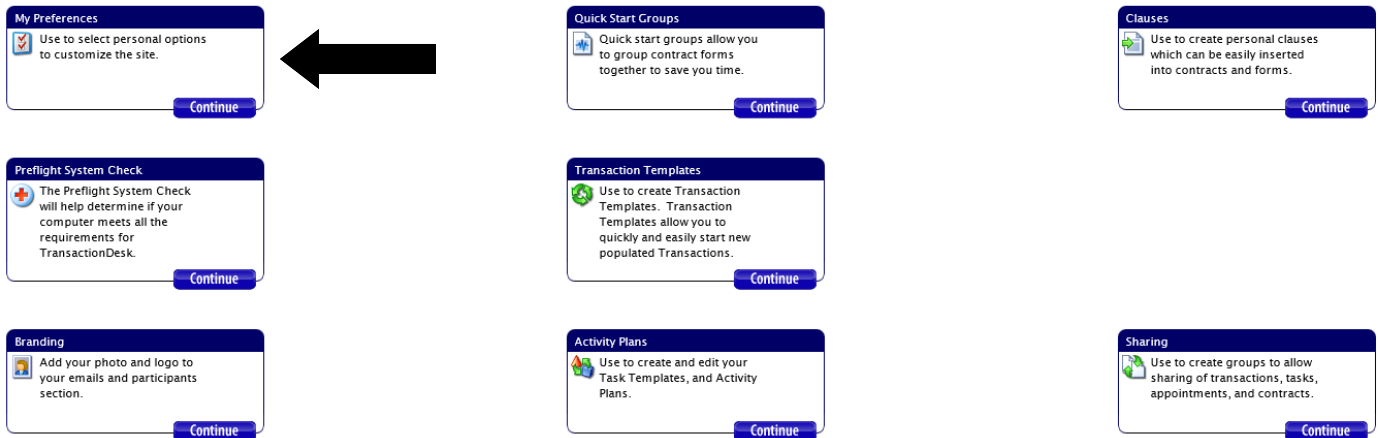
New Access

Over Due Tasks

View Call Logs

Continue

Settings Tab



My Preferences/General Preferences

Preference Options

General Settings

User Information

Password Management

Transaction Settings

Task Settings

Appointment Settings

Email Signature

Form Settings

Document Settings

Faxing Settings

Contact Settings

Account Activity

Provider/Order Settings

Notification Settings

Print Driver Settings

DocBox2Go Settings

TopProducer Settings

General Preferences

☐ Enable pop-up reminders

☒ Enable Easy As 1-2-3 mode

☒ Enable Tech tips

When I log in, I want to go to:

☒ The Basic View, the basic TransactionDesk homepage.

☐ My Desktop, which shows an overview of: Tasks, Appointments, Documents, and Transactions.

☐ InstantForms so I can work on forms and contracts.

☐ The Transaction I last accessed while working in TransactionDesk.

Time Zone


(GMT-5) Eastern Standard Time

☒ Adjust time for daylight saving changes

Save Settings

Return To Settings

User Information

 Some of the data fields you are trying to change, may not take effect. If there is a data field that cannot be updated, please contact your board to make changes.

User Information

Name: Susan Barnette

Salutation:

Generation:

Language:

User ID: 29208965-D63A-473D-A140-27D4792EEFDA

Association/Board: Tennessee Association of REALTORS

Agent ID:

Agent License ID:

Phone:

Phone 2:

Fax:

Cell:

Pager:

Email:

Cell Email:

(Text Message Reminders) *NOTE: Provider fees may apply.

Website:

Primary Office

Office: Crye-Leike, REALTORS

Office ID: 768000064

Office License ID:

Address: 1510 Gunbarrel Road

City: Chattanooga

State: TN

Zip Code: 37421

Phone: 423-892-1515

Phone 2:

Fax: 423-899-7189

Transaction Settings

Transaction Options

Default View:

- All Transactions -

Default Sort:

Last Modified

Default Status:

- All -

When opening Transactions:

Go to Transaction Overview

☒

Create and Save a Transaction Fax-Back Cover Sheet.

☒

Show Event Progress in Transactions Overview.

Save Settings

Return To Settings









Transaction Types

I would like to:

Add Transaction Types

Transaction Types

Details

<input type="checkbox"/>		- None -	
<input type="checkbox"/>		Commercial Lease	
<input type="checkbox"/>		Commercial Listing	
<input type="checkbox"/>		Commercial Sale	
<input type="checkbox"/>		Lot & Land Listing	
<input type="checkbox"/>		Lot & Land Sale	
<input type="checkbox"/>		Residential Lease	
<input type="checkbox"/>		Residential Listing	
<input type="checkbox"/>		Residential Sale	
<input type="checkbox"/>		Residential Sale - FHA	

Results: 1 - 10 of 11

1 2 >>

 [Add Transaction Type](#)

Adding Transaction Types

* Transaction Type:

SaveCancel

Contact Types

Property Types

I would like to: Add Property Types

Property Types		Details
<input type="checkbox"/>	- None -	
<input type="checkbox"/>	Commercial	
<input type="checkbox"/>	Condominium	
<input type="checkbox"/>	Lease	
<input type="checkbox"/>	Multi-Family	
<input type="checkbox"/>	Residential	
<input type="checkbox"/>	Vacant Land	

Transaction Statuses

I would like to: Add Transaction Status

Transaction Statuses		Details
<input type="checkbox"/>	Active	
<input type="checkbox"/>	Closed	
<input type="checkbox"/>	Closed-File Complete	
<input type="checkbox"/>	Expired	
<input type="checkbox"/>	Open	
<input type="checkbox"/>	Pending	
<input type="checkbox"/>	Withdrawn	

Results: 1 – 7 of 7

Task Settings

Task Options

Default View: All Tasks

Default Sort: Due Date

Default Status: Open

Save Settings

Return To Settings

Task Types

I would like to: Add Task Types

1 2 3 >>

Task Types				Details
<input type="checkbox"/>		- None -		
<input type="checkbox"/>		A_ 5 Day Lender Notification		
<input type="checkbox"/>		A_ 14 Day Notification Sent		
<input type="checkbox"/>		A_ Appraisal Contingency Satisfied		
<input type="checkbox"/>		A_ BAD Copy To All Parties		
<input type="checkbox"/>		A_ Copies to Lender		
<input type="checkbox"/>		A_ Earnest Money Deposit		
<input type="checkbox"/>		A_ Final Walk Thru		
<input type="checkbox"/>		A_ Home Inspection Completed		
<input type="checkbox"/>		A_ Home Inspection Contingency Removal		

Results: 1 - 10 of 28

1 2 3 >>

Appointment Settings

Calendar Settings

Default Calendar:

Month

Save Settings

Return To Settings

Appointment Types

I would like to: Add Appointment Types

Appointment Types		Details
<input type="checkbox"/>	- None -	
<input type="checkbox"/>	Closing	
<input type="checkbox"/>	CMA	
<input type="checkbox"/>	Instructing	
<input type="checkbox"/>	Showing	
<input type="checkbox"/>	Vacation	

Results: 1 - 6 of 6

[Add Appointment Type](#)

Email Signature

Email Signature Settings

Signature:

Regards,

Susan Barnette, GRI, ABR, CRS, ITI, e-PRO, SFR, BPOR, SRES
2010 TAR REALTOR Educator of the Year
Crye-Leike REALTORS
423-892-1515 - Office
423-370-1999 - eFax
423-463-0321 - Cell
Licensed in TN & GA
Equal housing opportunity.

Save Settings

Return To Settings

Form Settings

Form Settings

Default Sort: Form Name ▼

Default Font Style: Times-BoldItalic ▼

Default Font Color: Black ▼

Default Font Size: 11 ▼

Default Period

Within the past year ▼

☐ Create a Copy of Form when Emailing.

☒ Auto-Save Form Information.

Notifications

Enable All Notifications ▼

Save Settings

Return To Settings

Document Settings

Document Options

☒ Disable auto-timestamping and certification of documents

Storage Space

Total : Unlimited

Used: 72.92 MB

Available: Unlimited

Save Settings

Return To Settings

Document Types

I would like to: Add Document Types

☐ Document Types

Details

<input type="checkbox"/> - None -	
<input type="checkbox"/> Appraisal	
<input type="checkbox"/> Check List	
<input type="checkbox"/> Contract	
<input type="checkbox"/> Counter Offer	
<input type="checkbox"/> Disclosure	
<input type="checkbox"/> Inspection	
<input type="checkbox"/> Lead Based Paint Booklet	
<input type="checkbox"/> Letter	
<input type="checkbox"/> Listing	

Results: 1 - 10 of 19

1 2 >>

[Add Document Type](#)

Faxing Settings

Faxing Settings

☐ Hide my phone/fax numbers from cover sheets

Fax Back Numbers

Primary: 1-888-895-6514

Secondary: 1-720-836-6424

[Click here to purchase your own fax number.](#)

Save Settings

Return To Settings

Contact Settings

Contact Settings

Default View:

All Contacts

▼

Default Sort:

First Name

▼

Save Settings

Return To Settings

Contact Types

I would like to:

Add Contact Types





















▼

➔

1

2

>>

Contact Types		Details
<input type="checkbox"/>	 - None -	
<input type="checkbox"/>	 Agent	
<input type="checkbox"/>	 Appraisal Company	
<input type="checkbox"/>	 Broker	
<input type="checkbox"/>	 Buyer	
<input type="checkbox"/>	 Condo Association/HOA	
<input type="checkbox"/>	 Escrow Company	
<input type="checkbox"/>	 General	
<input type="checkbox"/>	 Home Inspector	
<input type="checkbox"/>	 Lawyer	

Results: 1 - 10 of 19


1

2

>>

Account Activity

Account Activity

 Accounts that are logged in will automatically be logged out after 30 minutes of inactivity.

1 2 3 4 5 6 7 8 9 10 ... 111 >>

Date/Time In	Date/Time Out	IP Address
1/21/2015 4:49:46 PM – EST	Current Session	68.169.162.12
1/21/2015 12:59:18 PM – EST	1/21/2015 1:29:23 PM – EST	68.169.162.12
1/16/2015 4:16:10 PM – EST	1/16/2015 4:20:47 PM – EST	68.169.162.12
1/14/2015 2:48:51 PM – EST	1/14/2015 3:28:05 PM – EST	68.169.162.12
1/14/2015 2:32:37 PM – EST	1/14/2015 3:15:34 PM – EST	68.169.162.12
1/14/2015 1:48:00 PM – EST	1/14/2015 2:59:05 PM – EST	68.169.162.12
1/14/2015 1:06:53 PM – EST	1/14/2015 1:37:04 PM – EST	68.169.162.12
1/10/2015 10:41:34 AM – EST	1/10/2015 11:17:20 AM – EST	68.169.162.12
1/8/2015 9:36:46 AM – EST	1/8/2015 10:06:50 AM – EST	68.169.162.12
1/6/2015 5:27:15 PM – EST	1/6/2015 6:02:14 PM – EST	68.169.162.12

Results: 1 – 10 of 1102

1 2 3 4 5 6 7 8 9 10 ... 111 >>

Return To Settings

Provider/Order Settings

Service Provider Settings

Default View:

All Providers

▼

Default Sort:

First Name

▼

Service Order Settings

Default View:

All Orders

▼

Default Sort:

Transaction Name

▼

Default Status:

Submitted

▼

Save Settings

Return To Settings















Provider/Order Settings

I would like to:


Add Service Order Types

▼

➔

<input type="checkbox"/> Service Order Types	Details
<input type="checkbox"/>  - None -	
<input type="checkbox"/>  Appraisal Services	
<input type="checkbox"/>  Financial Services	
<input type="checkbox"/>  Home Inspection	
<input type="checkbox"/>  Insurance	
<input type="checkbox"/>  Legal Services	
<input type="checkbox"/>  Title & Escrow Services	















Results: 1 - 7 of 7




Add Service Order Type

Service Provider Types

I would like to: Add Service Provider Types

Service Provider Types		Details
<input type="checkbox"/>	 - None -	
<input type="checkbox"/>	 Appraiser	
<input type="checkbox"/>	 Attorney	
<input type="checkbox"/>	 Inspector	
<input type="checkbox"/>	 Insurance	
<input type="checkbox"/>	 Lender	
<input type="checkbox"/>	 Title/Escrow	

Results: 1 – 7 of 7

 [Add Service Provider Type](#)

Notification Settings

Notification Settings

Appointment – Notify Assigned Members

Return To Settings

Print Driver Settings

The DocBox Printer allows you to fax, email and/or upload files into DocBox by virtually 'printing' them from any application on your PC by simply clicking on File, Print and selecting the DocBox Printer.

[Click here to learn more about the DocBox Printer.](#)

[Download and view the user guide here. It will tell you everything you need know to get started.](#)



Getting Started with the DocBox Printer

1. Download and Install the DocBox Print Driver. [Click here to download the DocBox Print Driver.](#)
2. You will need your User Key. You can copy it from here. User Key: **29208965-D63A-473D-A140-27D4792EEFDA**
3. You will also need your DocBox Printer Password. [Click here to set your TransactionDesk password](#) or [click here to have us send instructions on how to change your password to your email address on record.](#)

Once the DocBox Printer driver is loaded simply 'Select Print' from any windows program and select the 'DocBox Printer from Instant Solutions' as your printer.



You will have to enter your User Key ONLY on the first use.

[To get Live help using the DocBox Printer click here.](#)

Doc Box To-Go Settings



**Access Your Files
Anytime, Anywhere!**



DocBox2Go provides mobile access to your forms, files, transactions and contacts from your Smartphone.

[Click here to learn more about DocBox2Go.](#)

To access **DocBox2Go** browse to www.docbox2go.com in your SmartPhone Browser and enter your login information.

Use the following information to access your mobile account:

First Name: Susan

Last Name: Barnette

Password: [Click Here](#) to set your **DocBox2Go** password or [click here to have us send instructions on how to change your password to your email address on record.](#)

[To get Live help using DocBox2Go click here.](#)

Top Producer Settings

Top Producer Data Services Setup

☐ Yes, I want to enable my TransactionDesk account to access my Top Producer account.

Your Unique Code Key for Top Producer:

C75DA14A-FDC0-4FC9-A8A8-FA912DC7F53F

Your Top Producer User Name:

Save

Branding



Add your photo and logo to your emails and participants section.

Continue

Personal photo successfully removed.

Current Fax-Back Cover Sheet Banner

No Photo



Available

Change Banner

Remove Banner

Current Images

Email Settings

No Photo



Available

Border Color: Black

Save Settings

Cancel

Change Image

Remove Image

No Photo



Available

Change Logo

Remove Logo

Click on any “Change” button to change your fax back cover banner, your personal photo and company logo. Follow on screen directions to add each photo. The photos must be located on the hard drive of your computer or on an external source that you can browse to, to retrieve.

Supported File Types: .jpg, .bmp, .gif, and .png

Select Image:

+ Add

Upload Company Logo

Cancel

Note: The system will automatically resize all uploaded images to the correct size.

Quick Start Groups



Quick start groups allow you to group contract forms together to save you time.

Continue

I would like to: Create a New Quick-Start Group



My Quick-Start Groups

Details

☐  [A_Land Listing Package](#)



☐  [A_Land Sales Package](#)



☐  [A_New Construction Sales Package – FHA](#)



☐  [A_New Construction Sales Package–Non FHA](#)



☐  [A_Residential Listing Package](#)



☐  [A_Sale Package – Non FHA](#)



☐  [A_Sales Package– FHA](#)



☐  [GCAR Residential Sale FHA/VA](#)



Results: 1 – 8 of 8

1

Quick-Start Groups

* Quick-Start Group Name:

(This will show up in your Transaction when adding forms)

Description:

☐ Automatically add this Quick-Start Group to new Transactions of type:

Transaction Type: [Add Transaction Type](#)

Save Quick-Start Group

Cancel

2 Name the quick start group, check box, select transaction type, click on Save

Quick-Start Groups

* Quick-Start Group Name:

(This will show up in your Transaction when adding forms)

Description:

☒ Automatically add this Quick-Start Group to new Transactions of type:

Transaction Type: Residential Sale - FHA [Add Transaction Type](#)

Save Quick-Start Group Cancel

3 Click on orange “Go” arrow

Quick-Start Groups


* Quick-Start Group Name:

(This will show up in your Transaction when adding forms)

Description:

☒ Automatically add this Quick-Start Group to new Transactions of type:

Transaction Type: Residential Sale - FHA [Add Transaction Type](#)

I would like to: Add Forms to Quick Start Group 

Current Forms in Quick-Start Group

- No Quick-Start Group Items -

4 Click on + beside 2015 TAR Residential Forms, select forms you want to add to the quick start folder. If selecting more than one hold the Ctrl key down while selecting, click on Add Selected Forms.

Available Forms


- [-]  Individual Forms
 - [+]  2015 TAR Commercial Forms
 - [+]  2015 TAR Residential Forms
 - [+]  Fannie Mae Forms

- [-]  2015 TAR Residential Forms
 -  RF 101 Exclusive Right to Sell Listing Agreement (Designated Agency)
 -  RF 102 Exclusive Right to Sell Listing Agreement (Seller Agency)
 -  RF 131 Lot/Land Exclusive Right to Sell Listing Agreement (Designated Agency)
 -  RF 132 Lot/Land Exclusive Right to Sell Listing Agreement (Seller Agency)
 -  RF 141 Exclusive Buyer Representation Agreement (Designated Agency)
 -  RF 142 Exclusive Buyer Representation Agreement (Buyer Agency)
 -  RF 143 Non-Exclusive Buyer Representation Agreement (Designated Agency)
 -  RF 144 Non-Exclusive Buyer Representation Agreement (Buyer Agency)
 -  RF 151 Listing/Agency Mutual Release Agreement
 -  RF 161 Agreement to Show Property
 -  RF 201 Tennessee Residential Property Condition Disclosure
 -  RF 202 Tennessee Residential Property Condition Disclosure Update
 -  RF 203 Tennessee Residential Property Condition Exemption Notification
 -  RF 204 Tennessee Residential Property Condition Disclaimer Statement
 -  RF 205 Additional Required Residential Disclosures
































Add Selected Forms


Cancel

5 Check to make sure the forms you want are in the current forms list on the screen, if not click on orange “Go” arrow again and add additional forms. When finished click on Save Quick Start Group

I would like to: **Add Forms to Quick Start Group** 

☐ **Current Forms in Quick-Start Group**

<input type="checkbox"/> RF 401 Purchase and Sale Agreement	1			
<input type="checkbox"/> RF 625 FHA/VA Addendum	2			
<input type="checkbox"/> RF 651 Counter Offer	3			
<input type="checkbox"/> RF 656 Notification	4			
<input type="checkbox"/> RF 654 Repair/Replacement Proposal	5			
<input type="checkbox"/> RF 655 Repair/Replacement Amendment	6			
<input type="checkbox"/> RF 660 Buyer's Final Inspection Amendment	7			
<input type="checkbox"/> RF 702 Compensation Agreement between Listing and Selling Broker	8			
<input type="checkbox"/> RF 711 Vendor List	9			
<input type="checkbox"/> RF 712 Get a Home Inspection and Property Survey	10			
<input type="checkbox"/> RF 714 Water Supply and Waste Disposal Notification	11			

 [Add Quick-Start Group Items](#)

Save Quick-Start Group **Cancel**

Clauses























Use to create personal clauses which can be easily inserted into contracts and forms.

Continue

I would like to: Add New Clause



1 2 3 4 5 >>

My Clauses		Details
<input type="checkbox"/>	 ACCESS TO PUBLIC ROAD	
<input type="checkbox"/>	 ADDITIONAL BUYER CONTINGENCIES	
<input type="checkbox"/>	 AGENT AS PRINCIPAL OR RELATIVE OF PRINCIPAL	
<input type="checkbox"/>	 AMENITY PACKAGE RELEASE	
<input type="checkbox"/>	 ASSESSMENTS OR LIENS	
<input type="checkbox"/>	 Association Fees	
<input type="checkbox"/>	 Base Commission Fee	
<input type="checkbox"/>	 Broom Swept	
<input type="checkbox"/>	 Closing Costs-FHA	
<input type="checkbox"/>	 CONDOMINIUM LEGAL DESCRIPTION	

Results: 1 - 10 of 45

1 2 3 4 5 >>

Legend



Personal



Office




Board/Association



System

Sharing

 Use to create groups to allow sharing of transactions, tasks, appointments, and contracts.

Continue

I would like to: **Create a New Share Group** 

1

Your Share Groups Details

- No shares have been created -

Share Information

2 * Share Name:

(eg 'John Smith' if you are giving 1 person access, or 'Legal Dept.' for a common group)

Create New Share **Cancel**

Share Information

* Share Name:

(eg 'John Smith' if you are giving 1 person access, or 'Legal Dept.' for a common group)

Available Users

- 3
- Agnes Hellmann
 - Anita Newsom
 - Annie Brown
 - Babu Chacko
 - Barbara Garner
 - Barry Grayson
 - Billie Campbell
 - Brenda Pargeon
 - Caryl Ann Sikes
 - Charlene Anderson
 - Charles Powell
 - Connie Young
 - Darlene Seay
 - David Rhea
 - Debra Massey

Select users and access level, then click 'add' to add to insert. Hold the control (CTRL) key to select multiple users at one time

ADD >>

Access:

Access Rights Legend

-  = Read
-  = Write
-  = Full

Remove Members

Member Name

There are no members of this share. From the 'Available Users' list, select the users you want in this share. Click 'Add' when the users have been selected to insert them into the share.

4

5

Save Share Information **Cancel**

Creating a Transaction



Start a New Transaction

Work with an Existing Transaction



Work with Forms Associated with Transactions

Work with Individual Forms



Work with DocBox Documents

Transaction Options

☒ New Transaction

* Transaction Name:

Transaction Type: [Add Transaction Type](#)

Description:

Import from MLS

☐ Import from MLS:

MLS Provider

Property MLS ID

☐ Use the Name entered above instead of automatically generating a name when importing data.

☐ Populate from Existing Transaction

☐ Populate from Transaction Template

I would like to:

☐ Use the Transaction Wizard

☐ Go to Transaction Overview

I am the:

☐ Listing Agent

☐ Selling Agent

☒ Neither

☐ Both

Start Transaction

Cancel

- ✔ Step 1: General Information
- ▶ **Step 2: Property Information**
- Step 3: Transaction Dates
- Step 4: Contacts/Participants
- Step 5: Forms/Contracts
- Step 6: DocBox Documents
- Step 7: Working With Others
- Step 8: Tasks

Save and Exit



Current Step:
Step 2: Property Information



Property Information

MLS Number:	<input type="text"/>	
Address:	<input type="text"/>	Unit #: <input type="text"/>
City:	<input type="text"/>	State: <input type="text"/>
Zip Code:	<input type="text"/>	County: <input type="text"/>
Township:	<input type="text"/>	Tax Number: <input type="text"/>
Subdivision:	<input type="text"/>	School District: <input type="text"/>
Year Built:	<input type="text"/>	Lot Number: <input type="text"/>
Block:	<input type="text"/>	Page Number: <input type="text"/>
Deed Book:	<input type="text"/>	Instrument No: <input type="text"/>
Property Type:	<input type="text" value="- None -"/>	Add Property Type
Legal Description:	<input type="text"/>	

Listing Information

List Price:	<input type="text"/>	
Bal. Of 1st Mortgage:	<input type="text"/>	Bal. Of 2nd Mortgage: <input type="text"/>
Other Liens:	<input type="text"/>	Other Liens Desc.: <input type="text"/>
Total Encumbrances:	<input type="text"/>	
Property Includes:	<input type="text"/>	Property Excludes: <input type="text"/>
Leased Items:	<input type="text"/>	Supplemental Info: <input type="text"/>

Purchase Information

Deposit:	<input type="text"/>	Additional Deposit: <input type="text"/>
Purchase Price:	<input type="text"/>	Total Financing: <input type="text"/>

Comments

Comments:



Current Step:
Step 3: Transaction Dates



Transaction Dates

List Date:	<input type="text" value="mm/dd/yyyy"/>		Expiration Date:	<input type="text" value="mm/dd/yyyy"/>	
Offer Date:	<input type="text" value="mm/dd/yyyy"/>		Binding Agreement Date:	<input type="text" value="mm/dd/yyyy"/>	
Offer Expiration Date:	<input type="text" value="mm/dd/yyyy"/>		Offer Expiration Time:	<input type="text" value="12 AM"/>	<input type="text" value=":00"/>
Additional Deposit Date:	<input type="text" value="mm/dd/yyyy"/>				
Closing Date:	<input type="text" value="mm/dd/yyyy"/>				
Possession Date:	<input type="text" value="mm/dd/yyyy"/>		Possession Time:	<input type="text" value="12 AM"/>	<input type="text" value=":00"/>
Funding Date:	<input type="text" value="mm/dd/yyyy"/>				

Mortgage Dates

Application Date:	<input type="text" value="mm/dd/yyyy"/>		Commitment Date:	<input type="text" value="mm/dd/yyyy"/>	
-------------------	---	--	------------------	---	--



Current Step:
Step 4: Contacts/Participants



I would like to:



<input type="checkbox"/> Contact Name	Contact Type	Details
<input type="checkbox"/> Susan Barnette	Selling Agent	
<input type="checkbox"/> Crye-Leike, REALTORS	Selling Broker	

Results: 1 - 2 of 2



Current Step:
Step 5: Forms/Contracts



I would like to: **Add New Forms**

Forms	Order	Details
<input type="checkbox"/> RF 301 Working with a Real Estate Professional	1	
<input type="checkbox"/> RF 302 Confirmation of Agency Status	2	
<input type="checkbox"/> RF 303 Notification of Change in Agency Status	2	
<input type="checkbox"/> RF 141 Exclusive Buyer Representation Agreement (Designated Agency)	4	
<input type="checkbox"/> RF 401 Purchase and Sale Agreement	5	
<input type="checkbox"/> RF 654 Repair/Replacement Proposal	6	
<input type="checkbox"/> RF 655 Repair/Replacement Amendment	7	
<input type="checkbox"/> RF 653 Amendment to Purchase and Sale Agreement	8	
<input type="checkbox"/> RF 657 Closing Date / Possession Date Amendment	9	
<input type="checkbox"/> RF 651 Counter Offer	10	
<input type="checkbox"/> RF 304 Disclaimer Notice	11	
<input type="checkbox"/> RF 656 Notification	12	
<input type="checkbox"/> RF 711 Vendor List	12	
<input type="checkbox"/> RF 660 Buyer's Final Inspection Amendment	14	
<input type="checkbox"/> RF 625 FHA/VA Addendum	15	
<input type="checkbox"/> RF 712 Get a Home Inspection and Property Survey	16	
<input type="checkbox"/> RF 714 Water Supply and Waste Disposal Notification	17	
<input type="checkbox"/> RF 702 Compensation Agreement between Listing and Selling Broker	18	
<input type="checkbox"/> RF 708 Timeline Compliance Checklist for Purchase and Sale Agreement	19	
<input type="checkbox"/> RF 461 Real Estate Offer Confidentiality Agreement	20	

Update Order

= Mandatory Form



Current Step:
Step 6: DocBox Documents



I would like to: **Upload a Document**

Documents	Order	Download	Details
<input type="checkbox"/> Fax-Back Cover Sheet			

= Mandatory Document

[Add Documents](#)

[Upload a Document](#)

[Upload a Document via Email](#)



Current Step:
Step 7: Working With Others



Sharing Information:

- This transaction has not been shared. -

Share with Others

☐ I want to share this Transaction with others.

Available Shares:

ADD >>

<< REMOVE

Selected Shares:

Notification:

☐ Notify Assignees upon creation of Transaction

Add New Shares for the Selected Members



Current Step:
Step 8: Tasks

Save and Exit

I would like to: Add New Task



Tasks

Due Date

Status

Details

- No Tasks for this Transaction -

Add Task

Import Activity Plans

Import Task Templates



Transaction: Test



Transaction Wizard

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

Transaction Options

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

Forms/Documents

- InstantForms
- Documents

Tasks/Calendar

- Tasks
- Calendar/Appointments

Sharing

- Sharing

Congratulations, you finished the wizard. You may now start editing forms or work on any other task in order to complete your work.

I would like to: Add Contacts/Participants

Transaction Information	Edit	Event Progress
<p>Address:</p> <p>MLS Number:</p> <p>List Price: Purchase Price:</p> <p>List Date: Binding</p> <p>Expiration Date: Agreement Date:</p> <p>Closing Date:</p>		<p>Task: (0/0)</p> <p>Appointments: (0/0)</p> <p>Overall: (0/0)</p> <p>Progress</p>
<p>Documents</p> <p>Fax-Back Cover Sheet</p>	Edit	<p>InstantForms</p> <p>RF 301 Working with a Real Estate Professional</p> <p>RF 302 Confirmation of Agency Status</p> <p>RF 303 Notification of Change in Agency Status</p> <p>RF 141 Exclusive Buyer Representation Agreement (Designated ...)</p>
<p>Contacts/Participants</p> <p>Susan Barnette Selling Agent</p> <p>Crye-Leika, REALTORS Selling Broker</p>	Edit	<p>Tasks</p> <p>- No Tasks -</p> <p>Add Task</p>

PURCHASE AND SALE AGREEMENT

1 **1. Purchase and Sale.** For and in consideration of the mutual covenants herein and other good and valuable consideration,
2 the receipt and sufficiency of which is hereby acknowledged, the undersigned buyer

3 _____ (“Buyer”) agrees to buy and the
4 undersigned seller _____ (“Seller”) agrees to sell all that tract or parcel of land, with such improvements as are located thereon, described as follows:

5 All that tract of land known as: _____
6 _____ (Address) _____ (City), Tennessee, _____ (Zip), as recorded in
7 _____ County Register of Deeds Office, _____ deed book(s), _____ page(s),
8 and/or _____ instrument number and as further described as:

9 _____ together with all
10 fixtures, landscaping, improvements, and appurtenances, all being hereinafter collectively referred to as the “Property.”

11 **A. INCLUDED** as part of the Property (if present): all attached light fixtures and bulbs including ceiling fans;
12 permanently attached plate glass mirrors; heating, cooling, and plumbing fixtures and equipment; all doors, storm
13 doors and windows; all window treatments (e.g., shutters, blinds, shades, curtains, draperies) and hardware; all wall-
14 to-wall carpet; range; all built-in kitchen appliances; all bathroom fixtures and bathroom mirrors; all gas logs,
15 fireplace doors and attached screens; all security system components and controls; garage door opener and all (at
16 least _____) remote controls; an entry key; swimming pool and its equipment; awnings; permanently installed
17 outdoor cooking grills; all landscaping and all outdoor lighting; mailbox(es); attached basketball goals and
18 backboards; TV mounting brackets (but excluding flat screen TVs); antennae and satellite dishes (excluding
19 components); and central vacuum systems and attachments.

20 **B. Other items that REMAIN** with the Property at no additional cost to Buyer:

21 _____
22 _____
23 _____

24 **C. Items that WILL NOT REMAIN** with the Property:

25 _____
26 _____

27 **D. LEASED ITEMS:** Leased items that remain with the Property: (e.g., security systems, water softener systems, fuel
28 tank, etc.): _____

29 Buyer shall assume any and all lease payments as of Closing. If leases are not assumable, the balance shall be paid

I would like to: **Add New Forms**



Forms	Order		Download	Details
<input type="checkbox"/> RF 301 Working with a Real Estate Professional	<input type="text" value="1"/>	↓		
<input type="checkbox"/> RF 302 Confirmation of Agency Status	<input type="text" value="2"/>	↑ ↓		
<input type="checkbox"/> RF 303 Notification of Change in Agency Status	<input type="text" value="3"/>	↑ ↓		
<input type="checkbox"/> RF 141 Exclusive Buyer Representation Agreement (Designated Agency)	<input type="text" value="4"/>	↑ ↓		
<input type="checkbox"/> RF 401 Purchase and Sale Agreement	<input type="text" value="5"/>	↑ ↓		
<input type="checkbox"/> RF 654 Repair/Replacement Proposal	<input type="text" value="6"/>	↑ ↓		
<input type="checkbox"/> RF 655 Repair/Replacement Amendment	<input type="text" value="7"/>	↑ ↓		
<input type="checkbox"/> RF 653 Amendment to Purchase and Sale Agreement	<input type="text" value="8"/>	↑ ↓		
<input type="checkbox"/> RF 657 Closing Date / Possession Date Amendment	<input type="text" value="9"/>	↑ ↓		
<input type="checkbox"/> RF 651 Counter Offer	<input type="text" value="10"/>	↑ ↓		
<input type="checkbox"/> RF 304 Disclaimer Notice	<input type="text" value="11"/>	↑ ↓		
<input type="checkbox"/> RF 656 Notification	<input type="text" value="12"/>	↑ ↓		
<input type="checkbox"/> RF 711 Vendor List	<input type="text" value="13"/>	↑ ↓		
<input type="checkbox"/> RF 660 Buyer's Final Inspection Amendment	<input type="text" value="14"/>	↑ ↓		
<input type="checkbox"/> RF 625 FHA/VA Addendum	<input type="text" value="15"/>	↑ ↓		
<input type="checkbox"/> RF 712 Get a Home Inspection and Property Survey	<input type="text" value="16"/>	↑ ↓		
<input type="checkbox"/> RF 714 Water Supply and Waste Disposal Notification	<input type="text" value="17"/>	↑ ↓		
<input type="checkbox"/> RF 702 Compensation Agreement between Listing and Selling Broker	<input type="text" value="18"/>	↑ ↓		
<input type="checkbox"/> RF 708 Timeline Compliance Checklist for Purchase and Sale Agreement	<input type="text" value="19"/>	↑ ↓		
<input type="checkbox"/> RF 461 Real Estate Offer Confidentiality Agreement	<input type="text" value="20"/>	↑		



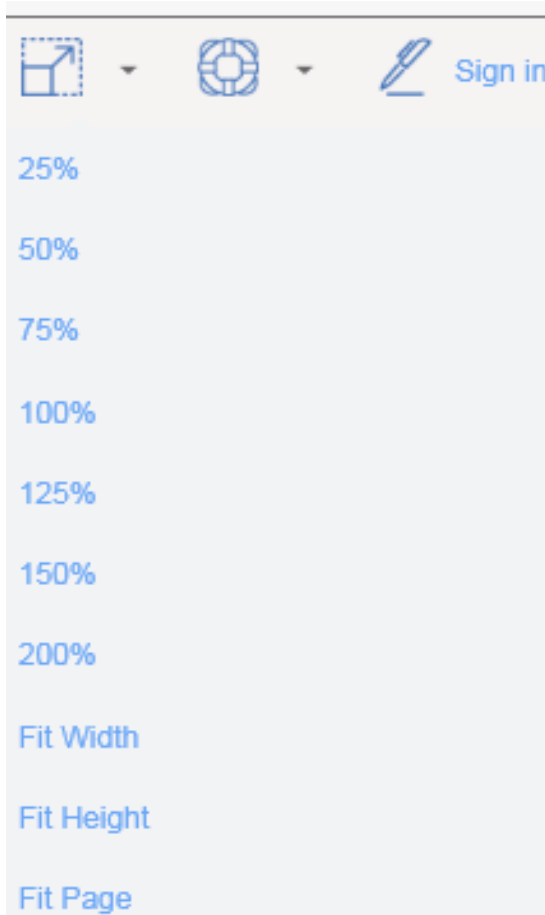
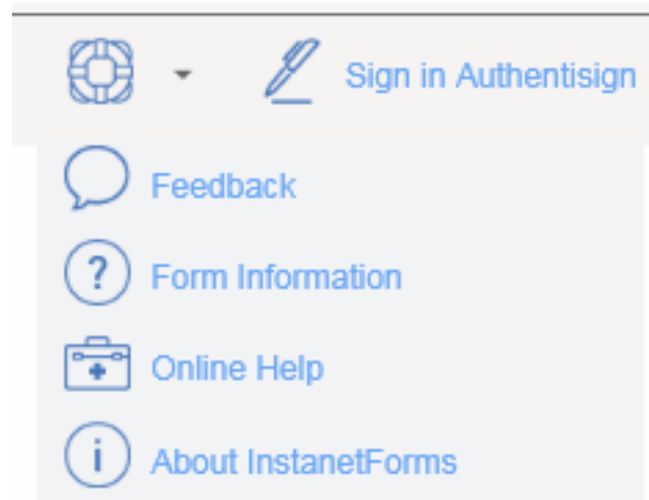
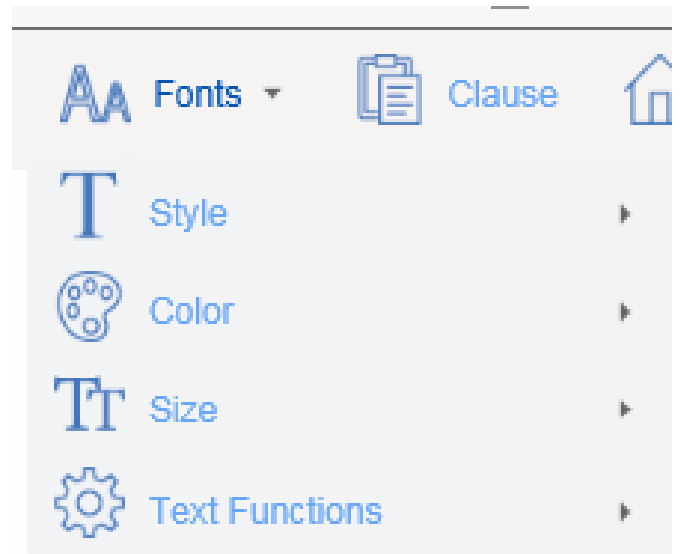
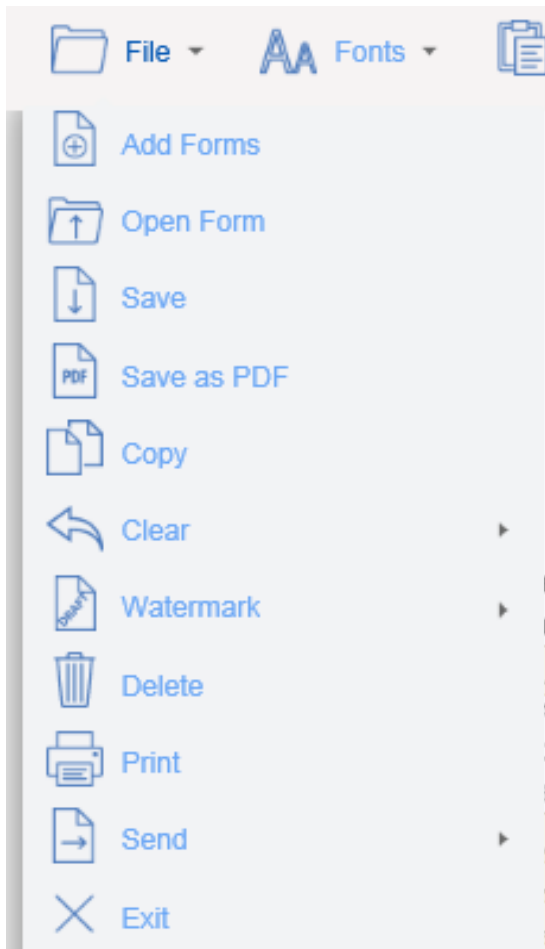
= Mandatory Form

[Update Order](#)

[Add Forms](#)

[Auto-Populate\Update Forms](#)

[Print All Forms to PDF](#)



✕

Insert Clauses

✓

Available Clauses	Selected Clauses
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <div style="display: flex; justify-content: space-between;"> Base Commission Fee ▼ </div> <p>The Base Commission Fee of \$175.00 (One hundred seventy five dollars) is added to each transaction to cover processing and preserving records for the State of Tennessee. All records are required to be held for three (3) years. The Base Commission fee will appear on the HUD statement, as it is required to be disclosed. If you have any questions or concerns regarding this fee, please feel free to contact our Principal Broker, Teresa Vincent at 423-478-2332.</p> </div>	<div style="border: 1px solid #ccc; height: 200px; margin-top: 5px;"></div>
Add>>	<< Remove Clear

✕

Test

✉
📄

Form - Click name to open	Send
RF 301 Working with a Real Estate Professional	<input type="checkbox"/>
RF 302 Confirmation of Agency Status	<input type="checkbox"/>
RF 303 Notification of Change in Agency Status	<input type="checkbox"/>
RF 141 Exclusive Buyer Representation Agreement (Designated Agency)	<input type="checkbox"/>
RF 401 Purchase and Sale Agreement	<input type="checkbox"/>
RF 654 Repair/Replacement Proposal	<input type="checkbox"/>
RF 655 Repair/Replacement Amendment	<input type="checkbox"/>
RF 653 Amendment to Purchase and Sale Agreement	<input type="checkbox"/>
RF 657 Closing Date / Possession Date Amendment	<input type="checkbox"/>
RF 651 Counter Offer	<input type="checkbox"/>
RF 304 Disclaimer Notice	<input type="checkbox"/>
RF 656 Notification	<input type="checkbox"/>
RF 711 Vendor List	<input type="checkbox"/>

Call Log

I would like to: Create New Call Log

View: Waiting Calls

Caller	Subject	Date/Time	Details
- No Calls -			

Call Information

* Caller:

* Subject:

Message:

Add New Logs via Email
[click to open email client, attach emails and send](#)

Save New Call Log

Cancel

Contacts & Participant

I would like to: Add New Transaction Contact

<input type="checkbox"/> Contact Name	Contact Type	Details
<input type="checkbox"/> Susan Barnette	Selling Agent	
<input type="checkbox"/> Crye-Leike, REALTORS	Selling Broker	

Results: 1 - 2 of 2

[Add New Transaction Contact](#)

Select Contact Type

Transaction Contact Type: Appraisal Company

Continue Cancel

Buyer Contact Information

Name: [Insert from Contacts](#)

Address:

City: State:

Zip Code:

Phone: Fax:

Cell: Pager:

Secondary Phone:

Email:

Participant Options

☐ Grant Contact access as Transaction Participant

☐ Add to my Contacts

Save Contact Information Cancel

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: ▼

Expiration: (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"/>	

☐ Document Permissions

Document Name	Grant Access	Additional Permissions
Fax-Back Cover Sheet	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant To Upload Revisions



Form Permissions

Form Name	Grant Access	Additional Permissions
RF 301 Working with a Real Estate Professional	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 302 Confirmation of Agency Status	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 303 Notification of Change in Agency Status	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 141 Exclusive Buyer Representation Agreement (Designated Agency)	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 401 Purchase and Sale Agreement	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 654 Repair/Replacement Proposal	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 655 Repair/Replacement Amendment	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 653 Amendment to Purchase and Sale Agreement	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 657 Closing Date / Possession Date Amendment	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 651 Counter Offer	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 304 Disclaimer Notice	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 656 Notification	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 711 Vendor List	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 660 Buyer's Final Inspection Amendment	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 625 FHA/VA Addendum	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 712 Get a Home Inspection and Property Survey	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 714 Water Supply and Waste Disposal Notification	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 702 Compensation Agreement between Listing and Selling Broker	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 708 Timeline Compliance Checklist for Purchase and Sale Agreement	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form
RF 461 Real Estate Offer Confidentiality Agreement	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant to Edit this Form



Contact Permissions

Contact	Grant Access	Additional Permissions
Susan Barnette [Selling Agent]	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant To Edit this Contact.
Crye-Leike, REALTORS [Selling Broker]	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant To Edit this Contact.
test test [Buyer]	<input type="checkbox"/>	<input type="checkbox"/> Allow Participant To Edit this Contact.



☐ Add to my Contacts

Save Contact Information

Cancel

Service Orders

I would like to: Create a New Service Order 

Service Orders

No Service Orders have been set up for this Transaction.



Choose Transaction and Order Type



Transaction



Test



Order Type

- None - 





[Add Service Order Type](#)

-  Step 1: Start Service Order
-  **Step 2: Select Provider**
- Step 3: Enter Order Details
- Step 4: Attach Documents
- Step 5: Choose Delivery Options



Select Provider



Show: All Providers  Sort By: First Name  Type: - None -  

Name		Company	Type
Select Provider	Trip Mabry		Inspector



Enter Order Details



General









Order Date: Wednesday, January 21, 2015 06:55 PM - EST

Order Type: Home Inspection



Ordering Agent: Susan Barnette

<input type="checkbox"/>	Participant	Company	Type
<input type="checkbox"/>	Susan Barnette		Selling Agent
<input type="checkbox"/>		Crye-Leike, REALTORS	Selling Broker

Request Date/Time: ☐ Requested Date  12 AM :00 ☐ Requested any time on this date
☒ No Request Date

Order Name:	Value:
 Street Address:	
 City:	
 State:	
 Zip Code:	
- Add New Detail -	

Order Details Legend

 = Change Detail Name/Value
 = Delete Detail

Additional Info:
(max 400
chars.)

Save



Attach Documents



I would like to:



The following documents have been attached to the order



Choose Delivery Options



Delivery Options

Method Of Delivery

☒ Email

☐ Print

☐ Fax

Cover Sheet Options

Include Fax-Back Cover Sheet?


☒ Yes, include cover sheet

Cover Sheet Header:

(max 250 chars.)

Cover Sheet Message:

Additional Recipients

Name	Email Address
 Trip Mabry	trip@tripmabryhomes.com
- Add New Recipient -	

Recipients Legend



= Change Recipient Name/Address



= Delete Recipient

Save

DocBox/Documents



Attach Documents



I would like to:



The following documents have been attached to the order

Fax Back Cover Sheet

I would like to:

Email Selected Documents

Documents

Missing Signers

Order

Status

Download

Details

☐

[Fax-Back Cover Sheet](#)

I

= Incomplete Document

M

= Mandatory Document

R

= Document ready for review.

S

= Document reviewed and accepted by staff.

✓

= Final Review Complete.

Add Documents

Upload a Document

Upload a Document via Email

Tasks

Type:

- None -

Sort By:

Due Date

Status:

All

Filter Tasks

I would like to:

Add New Task

Tasks

Due Date

Status

Details

- No Tasks for this Transaction -

General Task Information

* Task Name:

Task Type:

- None -

[Add Task Type](#)

Priority:

Normal

Due Date/Time:

Due on

mm/dd/yyyy

12 AM

:00

Due any time on this date

Due

Days

Before

List Date

No Due Date

Website:

Notes:

47

Tasks, cont.

Reminders

Email:

Never

Text Message:

Never

Assignees

☐ Allow Unassigned Participants to view this Task.

Available Assignees

Susan Barnette

-- Participants --

Winnie Pooh

ADD >>

<< Remove

Assignees

Susan Barnette

Notifications

Notifications: ☒ Notify assigned members immediately via email.

☒ Notify owner upon status change of this Task.

Save Task

Cancel

Calendar/Appointments


<div><div><div>◀</div><div>Today</div><div>January</div><div>▼</div><div>2015</div><div>▼</div><div>Go</div><div>▶</div></div></div>						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Sharing

Sharing Information:

- This transaction has not been shared. -

Share with Others

☐  I want to share this Transaction with others.

Available Shares:

ADD >>

<< Remove

Selected Shares:

Notification:

☒ Notify newly assigned users immediately via email.

Add New Shares for the Selected Members

Cancel

Adding Contacts

Show: All Contacts ▼ Type: - None - ▼ Sort By: First Name ▼ Filter Contacts

+ Contact Search Options

I would like to: Add a New Contact ▼ ➔ 1 2 3 4 5 6 7 8 9 10 ... 38 >>

<input type="checkbox"/> Name	Company	Type	Details
-------------------------------	---------	------	---------

General Information Home Address Work Address Additional Information

General Information

* Contact Name:

Spouse's Name:

Contact Type: - None - ▼ [Add Contact Type](#)

Email:


Alternate Email:

Agent ID: Agent License:


Save Contact Cancel

Remember to click on each tab in this sub menu to add full contact information. You can also import contacts out of Microsoft Outlook into transaction Desk and also from Top Producer.

Instanet Forms = Individual Forms

 [Click here to show Forms Grouped by Transaction](#)











Sort By: 

I would like to: 

Search: 

View other periods: 

You are currently viewing Forms modified within the past year.

-   Individual Forms
 -   2014 TAR Residential Forms
 -   2015 TAR Commercial Forms
 -   2015 TAR Residential Forms
 -   Fannie Mae Forms

Form Details


Name: Home Inspector-RF 711 Vendor List - 368
Owner: Susan Barnette
File Type: Adobe PDF (pdf)
Rights: Full
Date Created: 1/14/2015 2:52:47 PM - EST
Last Modified: 1/14/2015 2:52:47 PM - EST

Transaction Options

Select Transaction to attach form to:


 Attach Form


Form Description


I would like to: 


- Copy Form
- Copy Form to DocBox
- Delete Form
- Edit Form**
- Rename Form
- View/Flatten Form
- View Form History
- Download Form
- Markup Form in DocBox


Authentisign

 Signings

 Settings

 Support

 Log Out

 TransactionDesk

TD Training



 Step 1: Details

Created: 1/26/2015 10:37:11 PM

* Signing Name:

TD Training

Participant Order:

☒ Sign In-line - Signing Participants sign in order.

☐ Simul-Sign - First come first serve.

 Advanced options:

 Step 2: Participants

 Step 3: Documents

STEP 2

Cancel

Add Participants

Add New Participant

Transaction: TD Training

Add From Contacts

Add Yourself

Authentisign, cont.

STEP 2, cont.

This step allows you to choose the participants to the signing of the documents. Check the box beside all signers.

Cancel

Transaction: TD Training

Add

<input type="checkbox"/> Name	Email	Type	Details
<input type="checkbox"/> Susan Barnette	susan@susanbarnette.com	Reviewer - Selling Agent	
<input type="checkbox"/> Prince Charming	sbarnette7@gmail.com	Remote Signer - Buyer	

This is what you will see once you have selected the signers. This is where you assign their role in the signing process. Click on ADD when you have selected appropriate items in this step.

Cancel

Transaction: TD Training

Add

<input type="checkbox"/> Name	Email	Type	Details
<input checked="" type="checkbox"/> Susan Barnette	susan@susanbarnette.com	Reviewer - Selling Agent	
Type: <input type="radio"/> Remote Signer <input type="radio"/> In-Person Signer <input checked="" type="radio"/> Reviewer <input type="radio"/> CC Only			
<input checked="" type="checkbox"/> Prince Charming	sbarnette7@gmail.com	Remote Signer - Buyer	
Type: <input checked="" type="radio"/> Remote Signer <input type="radio"/> In-Person Signer <input type="radio"/> Reviewer <input type="radio"/> CC Only			

—

☒ Step 2: Participants

After you click Add, the screen will change and this is what you will see.

Add



STEP 3

Choose your documents in step 3.

Cancel

Add Documents

TD Training Forms and Documents

Select from Forms

Select from Transaction and DocBox Documents



Google Drive



Dropbox



OneDrive

Upload a File

Upload by Fax

Upload by Email

Print Driver

Select each document/form you want to include in the signing and then click on Add. After you click Add, the screen will change and you will see the bottom example. At this point you can move the forms/documents into the order you want them in the signing by clicking on the forward or back arrows.

Cancel		TD Training Forms and Documents		Add
<input type="checkbox"/>	Form/Document	Source	Details	
<input type="checkbox"/>	RF 301 Working with a Real Estate Professional	InstanetForms		
<input type="checkbox"/>	RF 302 Confirmation of Agency Status	InstanetForms		
<input type="checkbox"/>	RF 303 Notification of Change in Agency Status	InstanetForms		
<input type="checkbox"/>	RF 141 Exclusive Buyer Representation Agreement (Designated Agency)	InstanetForms		
<input type="checkbox"/>	RF 401 Purchase and Sale Agreement	InstanetForms		
<input type="checkbox"/>	RF 654 Repair/Replacement Proposal	InstanetForms		
<input type="checkbox"/>	RF 655 Repair/Replacement Amendment	InstanetForms		
<input type="checkbox"/>	RF 653 Amendment to Purchase and Sale Agreement	InstanetForms		
<input type="checkbox"/>	RF 657 Closing Date / Possession Date Amendment	InstanetForms		

Add

RF 302 Confirmation of Agency S...

1

RF 141 Exclusive Buyer Represen...

2

RF 401 Purchase and Sale Agreement

3

When you click on step 4, your screen will change and the system will begin to prepare the documents for signing.



Preparing 16 Page Document...

<

Step 4: Design
TD Training

>

Signers: Susan Barnette ▼

**CRYE-LEIKE,
REALTORS®**

CONFIRMATION OF AGENCY STATUS

1 Every real estate licensee is required to disclose his or her agency status in a real estate transaction to any buyer or
2 seller who is not represented by an agent and with whom the Licensee is working directly in the transaction. The
3 purpose of this Confirmation of Agency Status is to acknowledge that this disclosure occurred. Copies of this
4 confirmation must be provided to any signatory thereof. As used below, "Seller" includes sellers and landlords;
5 "Buyer" includes buyers and tenants. Notice is hereby given that the agency status of this Licensee (or Licensee's
6 company) is as follows in this transaction:
7 The real estate transaction involving the property located at:
8 _____
9 PROPERTY ADDRESS
10
11 **SELLER NAME:** _____ **BUYER NAME:** _____
12 **LICENSEE NAME:** _____ **LICENSEE NAME:** Susan Barnette
13 in this consumer's current or prospective transaction is in this consumer's current or prospective transaction
serving as: serving as:

Signers: Susan Barnette ▼

Drag & Drop

Markup

ZOOM

Page (1 / 16)

Layouts

Options

Signers: Prince Charming ▼

Susan Barnette

Prince Charming

>

Signers: Susan Barnette ▼

SIGN HERE
↓

SIGN OPT.
↓

INITIAL HERE
↓

INITIAL OPT.
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DATE

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📄 Page (1 / 16)

Pg 1 of RF 302 Confirmation of Agency Statu ▼

📄 Apply Layout

📄 Save as Layout(s)

🔄 Undo

↶ Clear

⊗ Exit Wizard

📄 Save Changes

📄 Layouts

⚙ Options

57

Cancel

Finalize Signing Setup

Send Invitations

You have successfully completed the creation of this signing.

NOTE:

To change the Email address of a signing participant or to customize the Invitation Email subject line or message before the invitations are sent select the "Customize" button below otherwise select the "Send" button above.

Customize Invitation Email(s) Subject and Text

Cancel

Customize Email(s)

Save

Susan Barnette:

Remote Signer

susan@susanbarnette.com

Subject:

Message:

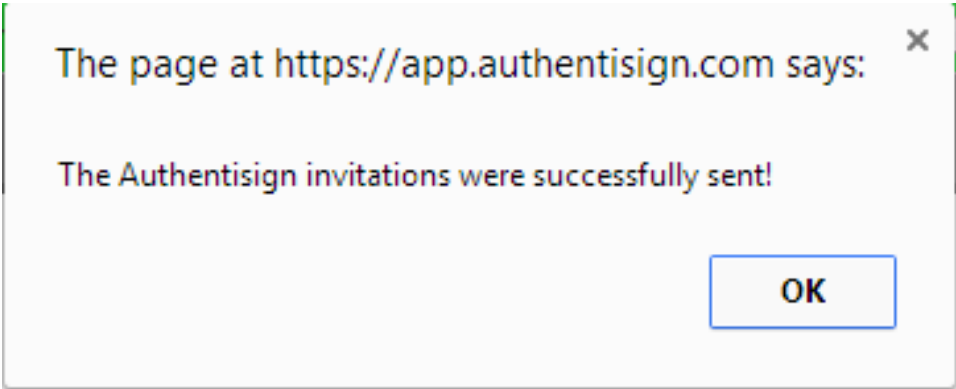
Prince Charming:

Remote Signer

sbarnette7@gmail.com

Subject:

Message:



New

Search

Sort By

Settings

Support

Log Out

TransactionDesk

Signings

Edit

TD Training

Status: [View Progress](#) Associated Transaction: [TD Training](#)

Modified: 1/26/2015 11:06:38 PM Created: 1/26/2015 10:37:11 PM

>

Test CI

Status: [Complete](#) Associated Transaction: [Test CI](#)

Modified: 1/14/2015 2:32:48 PM Created: 1/14/2015 2:21:36 PM

>



In Process



Complete



Signing Information

Authentisign Name: **Test CI**

Type: **Simul-Sign** - First come first serve.

Expiration Date:



Participant Name

Email

Type

Authenticated

Signed

Winnie The Pooh

susan@susanbarnette.com



Combined Document Versions

[Document for Test CI \(rev. 1 \)](#)

[Document for Test CI \(rev. 2 \)](#)

[Final Document](#)

NOTES: