Transaction Desk / Authentisign Instructions

Login to *Transaction Desk*:

1. Go to https://tnrealtors.com/
2. Click "***Member Login***"
3. Enter Username and Password
4. Click ***"Log In"***
5. Hover curser over "***Members***" to view pop-up menu
6. Click ***"TransactionDesk"*** (this should take you to your Agent Dashboard page)

Support:

1. Call **(800) 668-8768** for 24/7/365 support.
2. Click the ***Support*** icon on the left side of the page to access Help Videos, Guides (pdf booklets), Pre-Recorded Webinars, and Online Training.

A. How to print blank *"InstanetForms"*:

1. Login to *Transaction Desk*.
2. Click ***InstanetForms*** icon on the left side of screen.
3. Locate the desired form(s). Checkmark the circles to the right of the forms you want to print.
4. Click ***Print Blank Forms*** icon at top of screen. The icon number indicates how many forms you have loaded into your print queue.
5. Click ***Print*** icon from the pop-up menu, and ***"Print"***.

B. How to edit and print *"InstanetForms"* (without signatures):

1. Login to *Transaction Desk*.
2. Click ***InstanetForms*** icon on the left side of screen.
3. Locate and click on the desired ***"form name"***.
4. Click on ***"Create new stand-alone form"***.
5. Edit your form by filling-in the blanks and checking the boxes.
6. Click ***File*** icon at top of screen, then click ***Print*** icon from the drop-down menu.
7. Repeat for each additional form desired.

C. How to *"Authentisign"* an existing form:

1. Download the desired form or document to your computer's desktop (or other easy to find location on your computer),
   <u>OR</u> email the form or document (as an attachment) to your *Transaction Desk* inbox (e.g. – jim.coffer.1@transactiondesk.com. To find your address: Click ***DocBox*** > "InBox Folder" > > "Add new document" > "Email Upload" > copy address)
2. Login to *Transaction Desk*.
3. Click on ***Authentisign*** icon on the left side of screen.
4. Click on ***Create Authentisign*** icon at the upper right of screen.
5. Give it a name, select transaction (if any), and check the "Go to new signing?" box.
6. Click ***"Save"***, and the Authentisign page should open to ***"Step 1: Details"***.
7. Choose either "Sign In-line" or "Simul-Sign" option.
8. Click on ***"Step 2: Participants"***
9. ***"Add Participants"***. Include name, email, role (buyer, seller, etc), and if they are a signer or just a recipient of a final signed copy ("CC Only").
10. Rearrange the signing order by clicking on the arrows under the participant names.
11. Click on ***"Step 3: Documents"***
12. ***"Add Documents"*** by "Upload a File" from your computer, or selecting one from your "DocBox Documents" Inbox (if you emailed it to yourself), or from other sources.
13. Click on ***"Step 4: Design"***
14. Click on ***"Drag & Drop"*** (on upper right side) to place the "SIGN HERE" and/or "INITIAL HERE" boxes. The "Signer" drop-down menu (in the upper right corner) will contain the names of all participants, and you will need to Drag & Drop the required boxes for each individual signer to the proper locations within the form.
15. Click on ***"Markup"*** (on right side) to access tools that can be used to checkmark a box, or fill in a text field if needed.
16. Click ***"Next"*** (at top).
17. Click ***"Send Invitations".***
18. Check your email. You will receive email progress reports (subject: "Authentisign Signing Action") as each party signs the document, and an "Authentisign Signing *Final* Revision" email when all parties have completed signing. Click on the first link in that *"Final"* email to view, save, or print the completed signed document.
19. Forward that "Authentisign Signing *Final* Revision" email (which has the document link) to the cooperating agent and any other parties (lenders, etc) that require a copy of the document. Be sure to use a "read receipt" app (eg – Boomerang for Gmail) to confirm that your forwarded email was opened. Any signers will have already received a similar email from Authentisign so you won't have to send it to them, but you may want to get a written confirmation that they did receive it. If you downloaded a copy of the final document to your computer, you also have the option of attaching it to a separate email to distribute as needed (with "read receipts").

D. How to create a new *"TransactionDesk"* transaction (with signatures):

(these instructions are for an example of a buyer side residential purchase transaction)

1. Login to *Transaction Desk*.
2. Click on the ***Transaction Desk*** icon on the left side of screen.
3. Click on ***Create Transaction*** icon at the upper right of screen.
4. *Name* – give your new transaction a logical name (for example: *Rothbard, John & Mary – 4765 Eldridge St*)
5. *Template* – select "TRA Residential Buyer's Package" (or a Stand-alone form)
6. *Import Data* – select "RealTracs" and add the MLS number.
7. *Add me as the* – "Selling Agent" (when you are working on the buyer side)
8. Check the "Use Wizard" box.
9. Click "***Create".***
10. "Details – Step 1 of 5" should open. Complete all relevant fields. Entries here will be auto-populated on the forms to save you time later on.
11. Click ***"Next"*** (at top)**.** Don't click "Save and exit" or you will leave the wizard.
12. "Transaction Dates – Step 2 of 5" should open. Complete all relevant fields. Entries here will be auto-populated on the forms to save you time later on.
13. Click ***"Next"*** (at top)**.** Don't click "Save and exit" or you will leave the wizard.
14. "Contacts – Step 3 of 5" should open.
15. Click the ***Add Contacts*** icon at the upper right of screen.
16. Create, add, and save all contacts (parties) for this transaction, including yourself. Be sure to enter correct email addresses as these will be used for signing invitations.
17. Click ***"Next"*** (at top)**.** Don't click "Save and exit" or you will leave the wizard.
18. "Forms – Step 4 of 5" should open.
19. Click on the form names, one at a time, and complete each form by filling in the required fields and checkboxes. Hover over ***File*** icon at top of screen, then click ***Exit*** icon from the drop-down menu***. Repeat for each form.***
20. Click the ***Add Forms*** icon at the upper right of screen if you need to add additional forms to your transaction package. Edit them as needed.
21. Click ***"Next"*** (at top)**.** Don't click "Save and exit" or you will leave the wizard.
22. "Documents – Step 5 of 5" should open.
23. Click the ***Add Documents*** icon at the upper right of screen if you have other documents you want to include (such as Property Condition Disclosure, Lead Based Paint Disclosure, etc). You can Drag & Drop files to the blue box, or click on that blue box to upload files from your computer.
24. Click ***"Done".***

25. Click on ***Authentisign*** icon on the left side of screen.
26. Click on ***Create Authentisign*** icon at the upper right of screen.
27. Give it a name (using the transaction name is recommended), select transaction from drop-down menu, check the “Go to new signing?” box.
28. Click ***“Save”***, and the Authentisign page should open to ***“Step 1: Details”.***
29. Choose either “Sign In-line” or “Simul-Sign” option.
30. Click on ***“Step 2: Participants”***
31. ***“Add Participants”***. Include name, email, role (buyer, seller, etc), and if they are a signer, or just a recipient of a final signed copy (“CC Only”).
32. Rearrange the signing order by clicking on the arrows under the participant names.
33. Click on ***“Step 3: Documents”***
34. Checkmark the boxes next to the documents to be included.
35. Click ***“Add”*** in the upper right of the pop-up screen.
36. If you want to add additional documents, click on the ***“Add”*** button (on the left side) and you will have the option to “Upload a File” from your computer or other sources, or from your “DocBox Documents” inbox if you emailed yourself a document (e.g. – jim.coffer.1@transactiondesk.com. To find your inbox address: Click ***DocBox*** > “InBox Folder” > > “Add new document” > “Email Upload” > copy address)
37. Rearrange the document order by clicking on the arrows under the document names.
38. Click on ***“Step 4: Design”***
39. Click on ***“Drag & Drop”*** (in upper right) to place the “SIGN HERE” and/or “INITIAL HERE” boxes. The “Signer” drop-down menu (in the upper right corner) will contain the names of all participants, and you will need to Drag & Drop the required boxes for each individual signer to the proper locations within the form.
40. Click on ***“Markup”*** to access tools that can be used to checkmark a box, or fill in a text field if needed.
41. Click ***“Next”*** (at top).
42. Click ***“Send Invitations”.***
43. Check your email. You will receive email progress reports (subject: “Authentisign Signing Action”) as each party signs the document, and an “Authentisign Signing *Final* Revision” email when all parties have completed signing. Click on the first link in that *“Final”* email to view, save, or print the completed signed document.
44. Forward that “Authentisign Signing *Final* Revision” email (which has the document link) to the cooperating agent and any other parties (lenders, etc) that require a copy of the document. Be sure to use a “read receipt” app (eg – Boomerang for Gmail) to confirm that your forwarded email was opened. Any signers will have already received a similar email from Authentisign so you won’t have to send it to them, but you may want to get a written confirmation that they did receive it. If you downloaded a copy of the final document to your computer, you also have the option of attaching it to a separate email to distribute as needed (with “read receipts”).

E. How to email/print/fax completed documents from *"DocBox"*:

1. Login to *Transaction Desk.*
2. Click on ***DocBox*** icon .
3. Click on **"Transaction Folder".**
4. Locate and click on the "name of transaction" you want to access.
5. Checkmark the circle(s) to the right of the documents you want to include. The signed versions will have the ***Certified and Digitally Signed*** icon next to them.
6. Click the ***Basket*** icon at the top of the page.
7. Click the icon of your choice to ***Email*** , ***Print*** , or ***Fax*** .
   If emailing, it is recommended that you select the "Send as attachments" option.

Setup: Options, Preferences, and Settings

1. Click the ***Setup*** icon on left side of screen
2. Click "***Preferences"***
3. Click "***User Information"***
4. Add or change your personal information as desired, and click "***Update".***
5. Click "***Office Information"*** and confirm all fields. If there are any errors you will have to call TAR at (615) 321-1477 to have them make corrections.
6. Click "***Email Signature"*** and enter your preferences, and click "***Update".***
7. Click "***Branding"*** and enter a personal picture (that will appear on emails) or logo if desired, and click "***Update"***.
8. Click "***Login"*** if you want to change your password, and click "***Update"***.
9. Click on the ***Setup*** icon
10. Click "***Program Settings"***
11. Click "***Transaction Settings"***
12. <u>Un</u>-check the "Create Cover Sheet".
13. Check the "Use Wizard" box.
14. Click "***Update"***.
15. Click on "***Form Settings"***, check the "Auto-save" box.
16. Click "***Update".***
17. Click on "***Fax Settings"***, check the "Enabled" button to allow Auto-timestamping.
18. Click "***Update".***
19. Click on "***Print Driver Setup"*** if you would like to install a super useful DocBox Printer driver on your computer. The DocBox Printer allows you to fax, email and/or upload files into the DocBox by virtually 'printing' them from any application on your computer by simply clicking on File, Print, and selecting the DocBox Printer.