TRANSACTION DESK

ADVANCED

ALIGNED AXIS
VISION | EXECUTION | RESULTS

www.alignedaxis.com

Updated July 2023

Aligned Axis

Transaction Desk Advanced

#1: CREATE TEMPLATES

1. Create a Template
    a. Add Checklist, Contacts, Documents, and Forms
    b. Attach to Teams/Sharing
2. Add a Template to a new Transaction
3. Add a Template to an existing Transaction

#2: CREATE CLAUSES

1. Create a Clause
2. Add a Clause to a Form

#3: AUTHENTISIGN LAYOUTS

1. Creating Layouts
2. Applying Layouts

#4: AUTHENTISIGN FUNDAMENTALS

*This section will demonstrate the fundamentals of **how to send an e-Signature packet using Authentisign**, as well as the customer's signing journey, and how to specify additional signing details, such as the **signing name**, **expiry date**, **automatic reminders**, and **other options**.*

1. Update your e-signature for pre-signing documents
2. Update the name of the signing
3. Set an expiration date for the signing
4. Set an automated signing reminder
5. Update the New Authentisign ID position
6. Clear signing fields and markups

#5: SPECIFY ADDITIONAL SIGNING OPTIONS

*This section you will then learn **how to specify additional signing details, set expiration dates and automated signing reminders**, as well as clear signing fields and markups.*

Transaction Desk Advanced #1

CREATE TEMPLATES

Before you begin

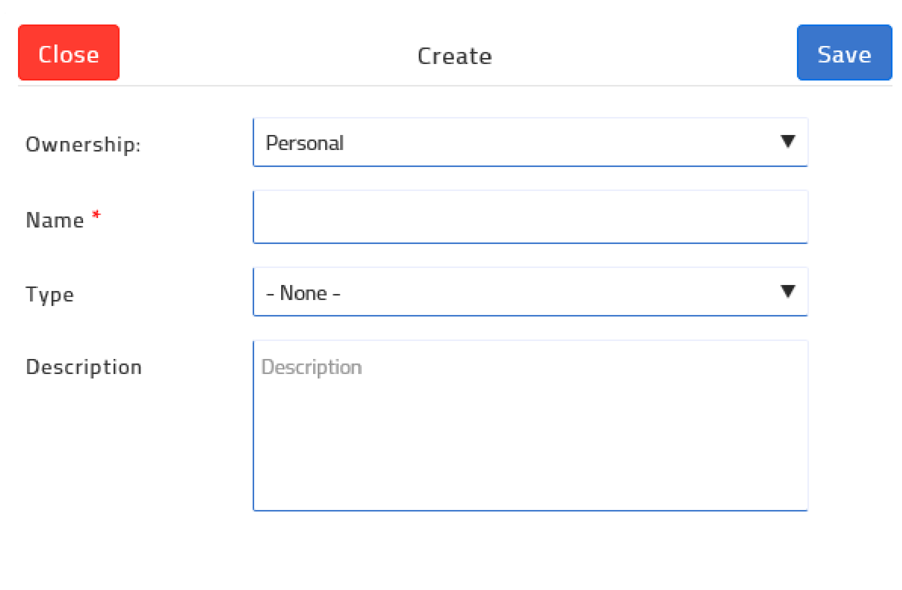
You require TransactionDesk Edition for brokers, and you require Super User access to create transaction templates for an office. You can, however, share a transaction template with your team members using the Sharing option.

Notes:

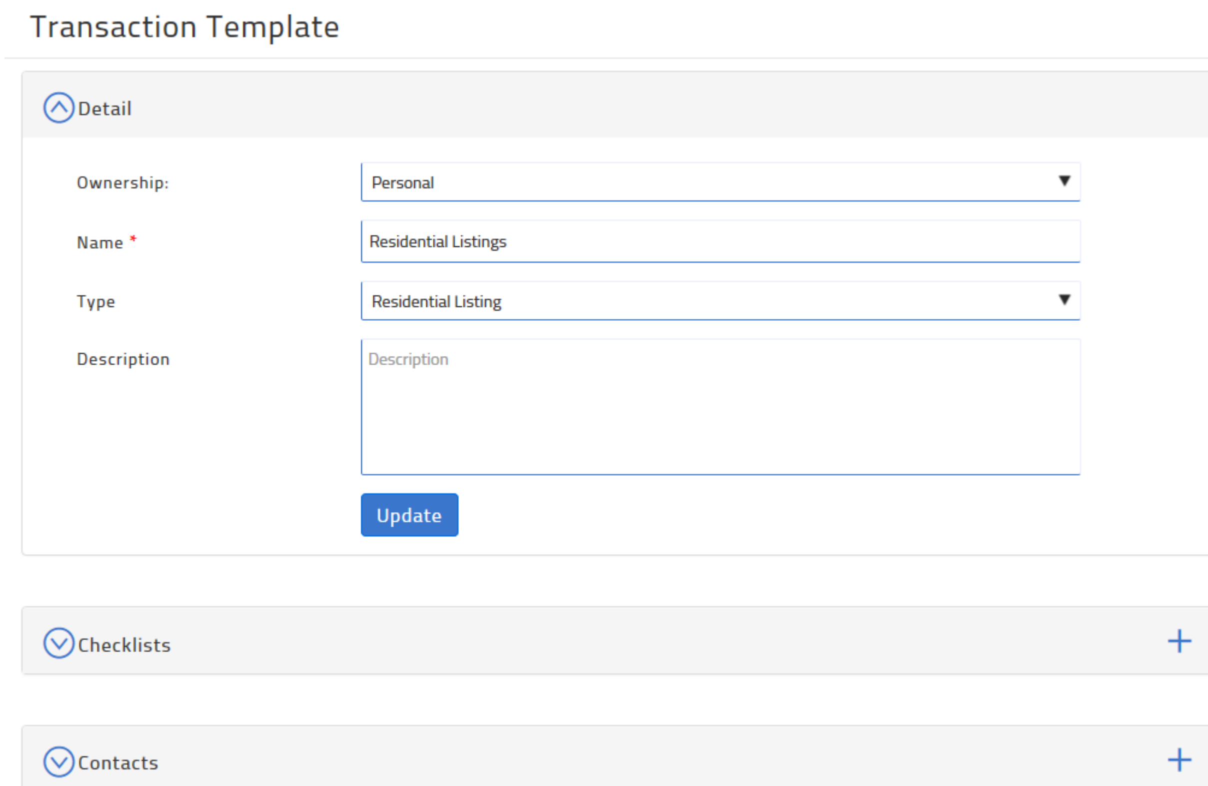
- Before you can share a transaction template with a group or team, the group or team must first be defined.
- Before you can add a checklist to a template, the checklist template must be defined.

ACTIVITY

1. In the navigation bar, click **Templates.** 
2. Click **Transaction Templates**. The Transaction Templates page opens.
3. Click **Add**. The Create Transaction Template page appears.



4. Use the **Ownership** dropdown to select who owns this template: **Personal** if it is for your own use, or to be shared with your team, or **PRINCIPAL/MANAGING BROKERS ONLY: Office** if it is to be available to all agents in the office.
5. In the **Name** field, give the template a meaningful name, such as Residential Listings.
6. Use the **Type** dropdown to select the type of transactions this template should be used for.
7. *Optional: In the **Description** field, enter a description for the template.*
8. Click **Save**.



9. To add a checklist to the template that would be common to all transactions of that type, in the **Checklists** section, click **+**. The list of checklists appears. Select one or more checklists, and click **Add**. Any transactions created from this template have the checklists attached automatically.
10. To add a contact to the template that would be common to all transactions of that type, such as escrow company, in the **Contacts** section, click **+** and create or select the contact. Any transactions created from this template have the contacts added automatically.
11. To add the documents that are typically required for this type of transaction, in the Documents and Folders section, click **+**.

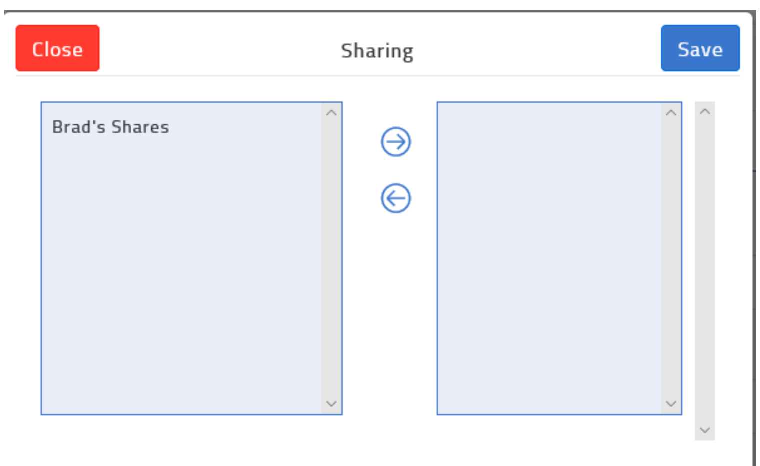
a. If you want to add individual documents, select **Add document**, add the documents, and click **Save**.
b. If you want to add a folder to organize the documents, select **Add folder**, give the folder a name, and click **Save**.
c. If you want to add a document to a folder you created here, click on the folder name to open the folder. Then click **+,** select **Add document**, and add the documents that you want in that folder, and click **Save**.

12. To add the forms that are typically required for this type of transaction, in the **Forms** section, click **+** and locate and select (check) the forms. Click **Add**. Any transactions created from this template have the forms attached automatically.

    Notes:

    a. You can click more options, and then click **Delete** to remove a form from the template at any time.
    b. Outdated forms are indicated as "This form has been disabled." These forms are not applied when the template is used.

13. To share this template with your team, in the Sharing section, click **+**.

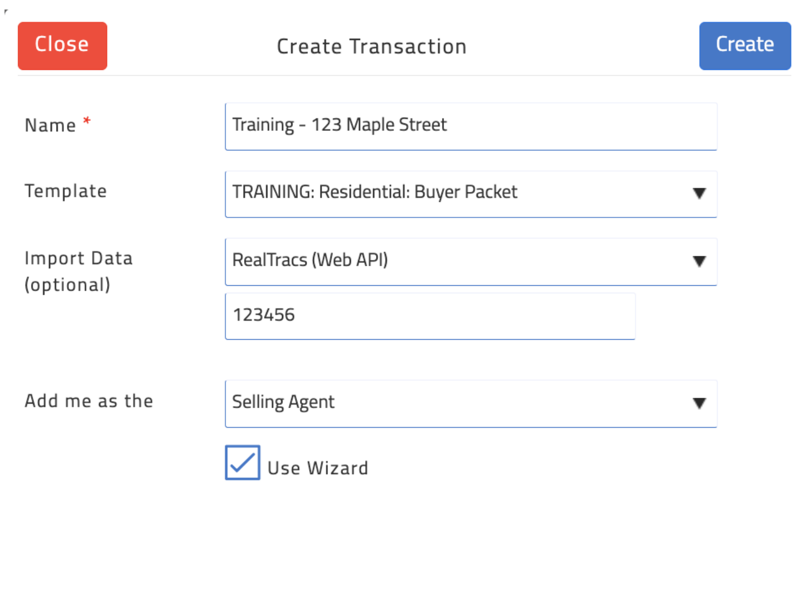


    a. In the left column, select the name of the group to share with.
    b. Click the right arrow to add the group to the list to share with.
    c. Click **Save**.

14. Click **Update**.

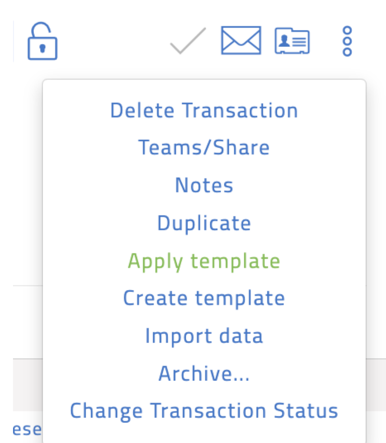
ADD A TEMPLATE TO A NEW TRANSACTION

1. From the Dashboard, click **Create Transaction.**
2. Enter a **Name** for the transaction.
3. Click the drop down arrow under **Template** → Select the desired template
4. Import Data (optional)
5. Select the desired option under **Add me as the**
6. If desired, check **Use Wizard**
7. Click **Create**



ADD A TEMPLATE TO AN EXISTING TRANSACTION

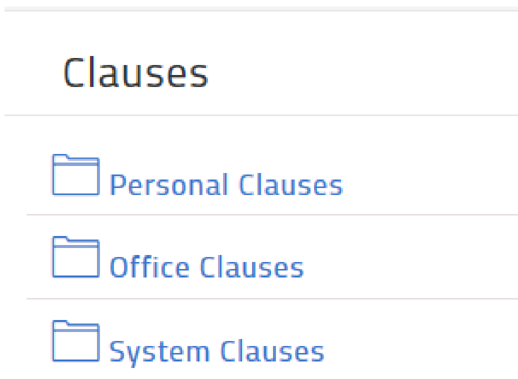
1. From the dashboard, click on the **Transactions** icon from the Navigation Bar.
2. Select the transaction.
3. In the upper toolbar, click the **menu button**, click **Apply template**
4. Select the desired template.
5. Click **Apply**



Transaction Desk Advanced #2

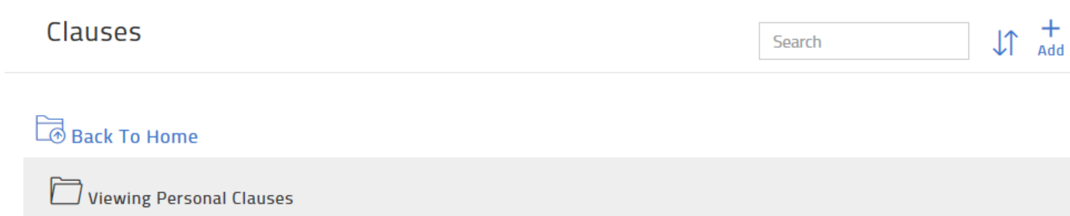
CREATE A CLAUSE

In the navigation bar, click **Clauses** .

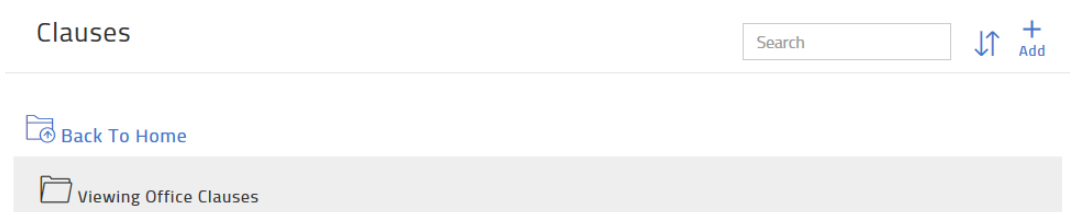


ACTIVITY

- ☐ Create a clause for your own personal use, click **Personal Clauses**.

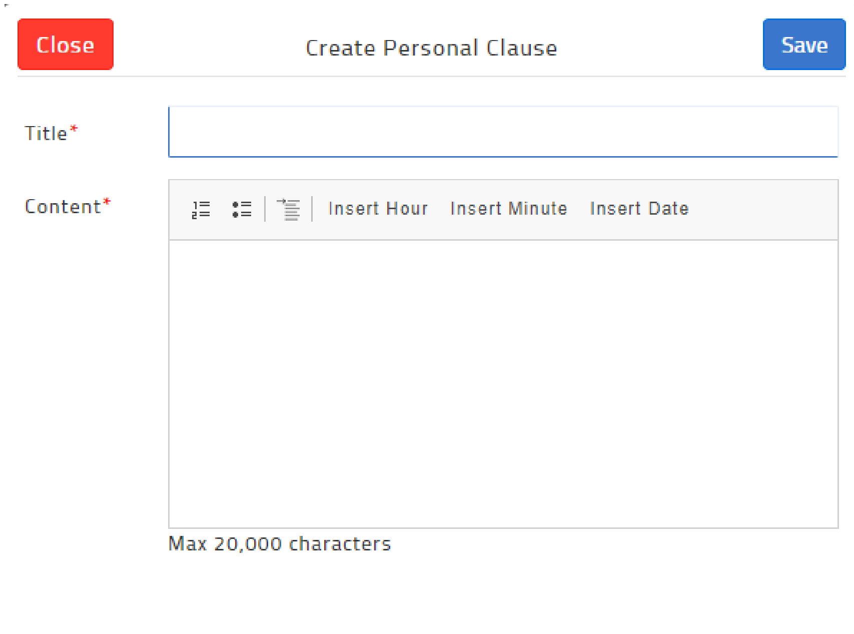


- ☐ If you have the permissions, create a clause for the office to use, click **Office Clauses**.



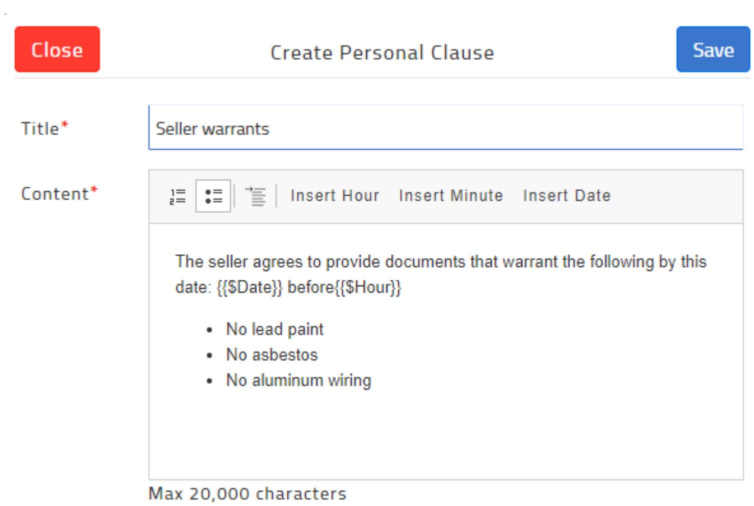
When adding Clauses, always check with your Broker. They may have the Brokerage Attorney review the Clause before it can be utilized. REMEMBER: You are NOT an Attorney, and therefore you CANNOT write legal verbiage for the Agreement / Amendments.

- [ ] Click **+Add** → **Add new clause**

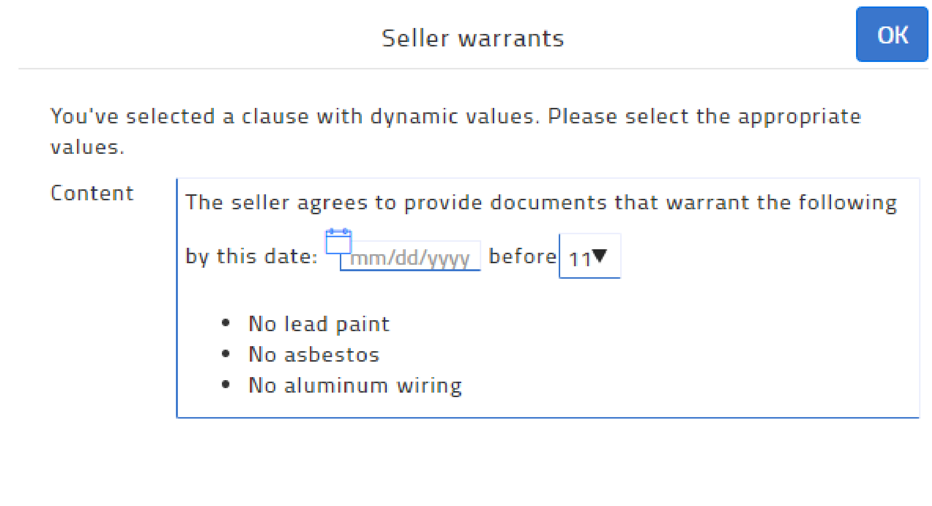


- [ ] In the **Title** field, give the clause a meaningful title.
- [ ] In the **Content** field, enter the text of the clause. Use the formatting functions to create bulleted lists, numbered lists, or indent the text. You can insert Hour, Minute, or Date placeholders as applicable. When the clause is used, the user is prompted to enter a value for any placeholders.

EXAMPLE:



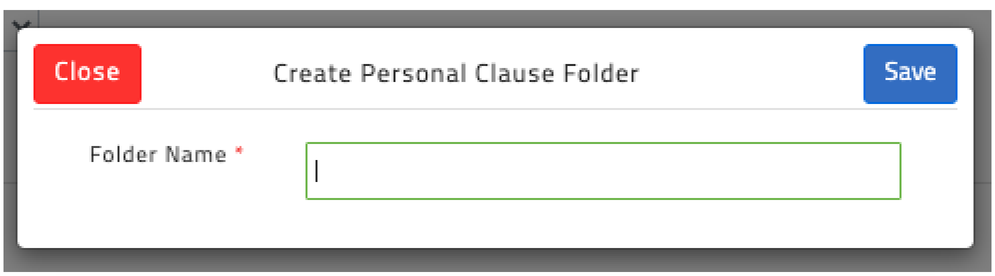
When the clause is inserted into a field in a form, the user is prompted to enter values, as shown here:

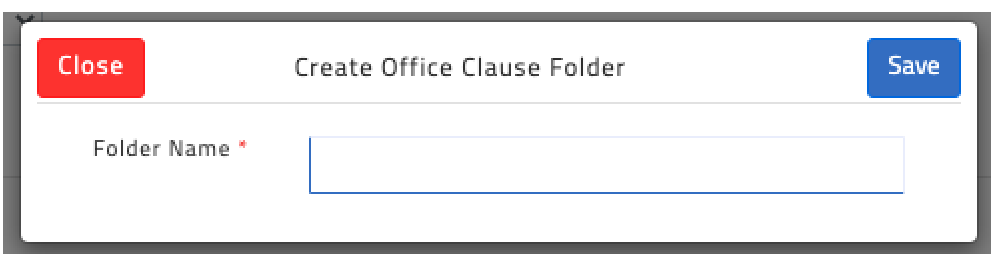


- [ ] Click **Save**.

ADD A CLAUSE FOLDER

1. In Personal Clauses or Office Clauses → Click **+Add** → **Add new folder**





2. In the **Folder Name** field, specify a meaningful name for the folder.
3. Click **Save**.
4. Open the Folder, and + Add desired clauses.

Transaction Desk Advanced #3

AUTHENTISIGN LAYOUTS

Create a layout when you frequently apply the same signing fields and markups to the same documents in the same locations. Creating a layout enables you to set up those signing fields and markups in advance and then apply them to a document with a single click, saving you valuable time manually setting up each field and markup on each document every time.

You can update, copy, or delete a layout at any time after you create one, and can apply it to a signing as soon as you create it.

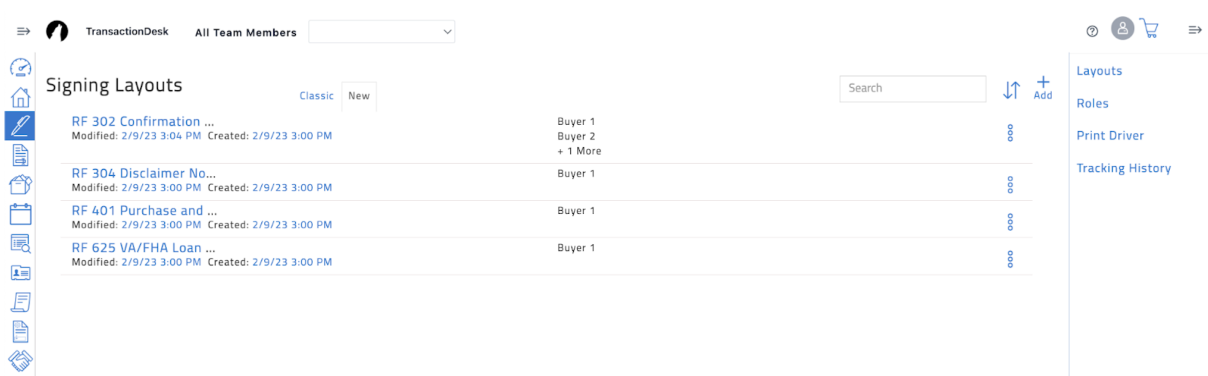
Notes:

- Your layout must have a minimum of:
  - 1 document
  - 1 Signer-type participant (or a Myself participant)
  - 1 Signing field

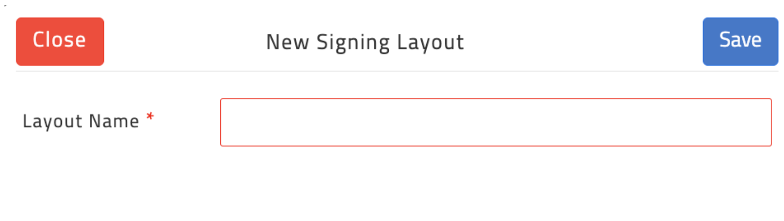
CREATING A LAYOUT

1. From the Navigation Bar, click on **Signings**.

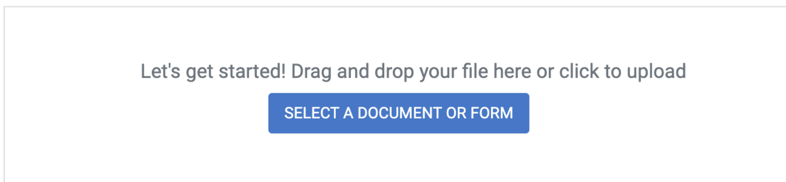
2. Open the right hand menu in the upper right corner , and select **Layouts**.



3. Click **+Add**.

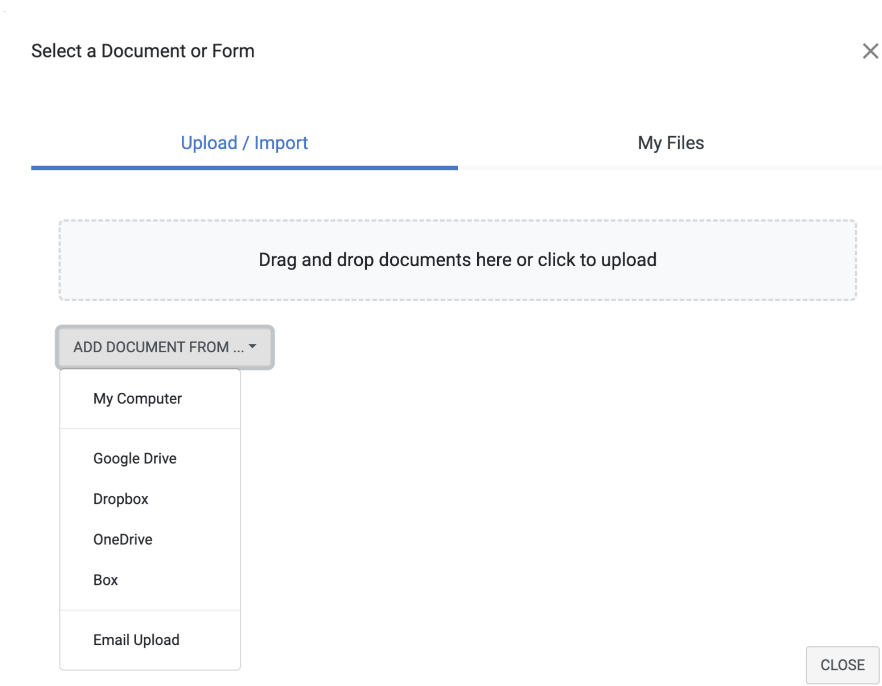


4. Type a name for the layout so you can easily locate it later in the Layout Name field.
5. Click **Select a Document or Form**

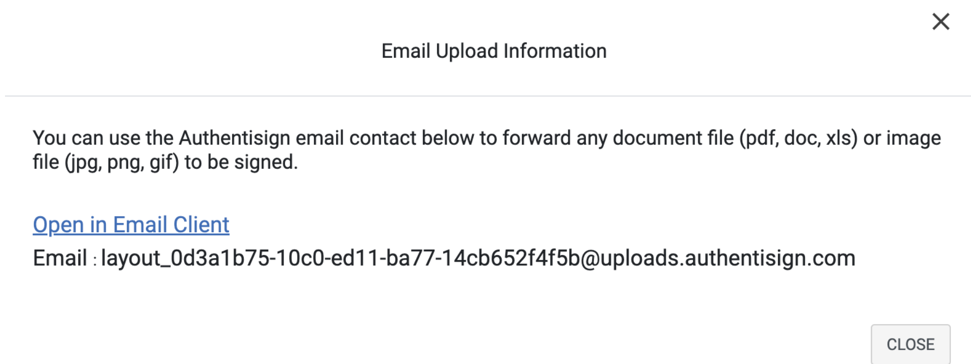


6. Do one of the following:

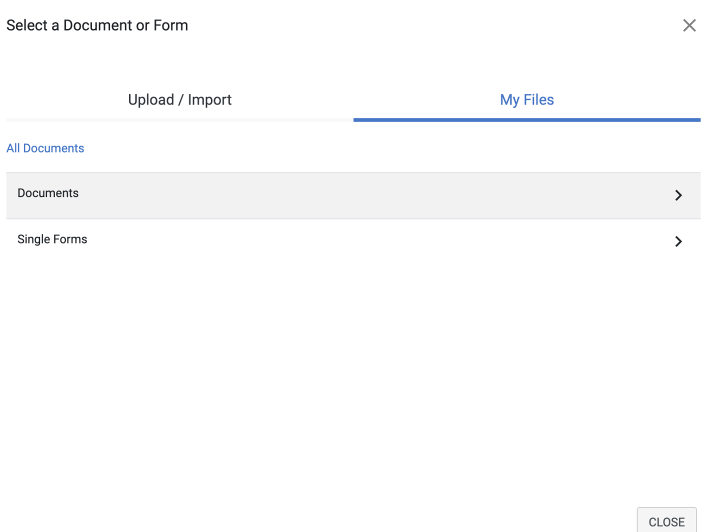
- ☐ Click **Drag & Drop files here or click to upload** to select the document from your computer's file manager.
- ☐ Drag and drop documents from your computer into the Drag & Drop files here or click to upload area.



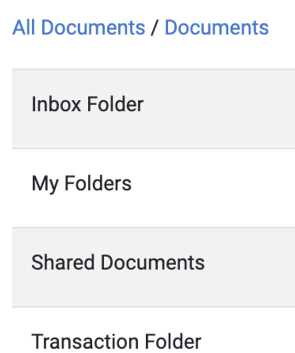
- [ ] Click **Add Document From…**
    - [ ] Click **My Computer** to select the document from your computer's file manager.
    - [ ] Click **Google Drive, Dropbox**, **One Drive,** or **Box** to select the document from your cloud-based accounts.
    - [ ] Click **Email Upload**



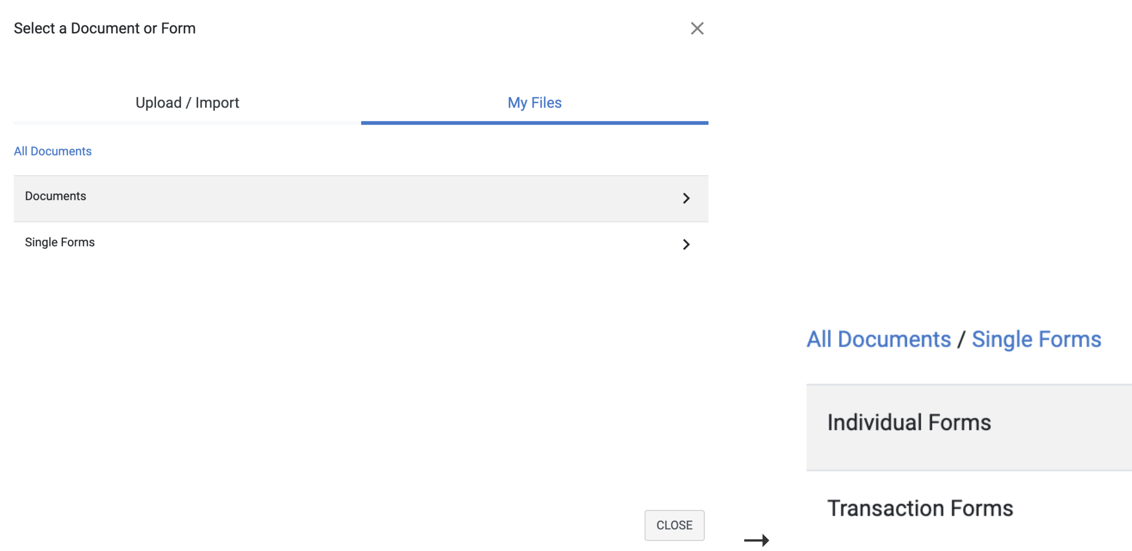
7. Additional Documents can be found under **My Files** → **Documents**



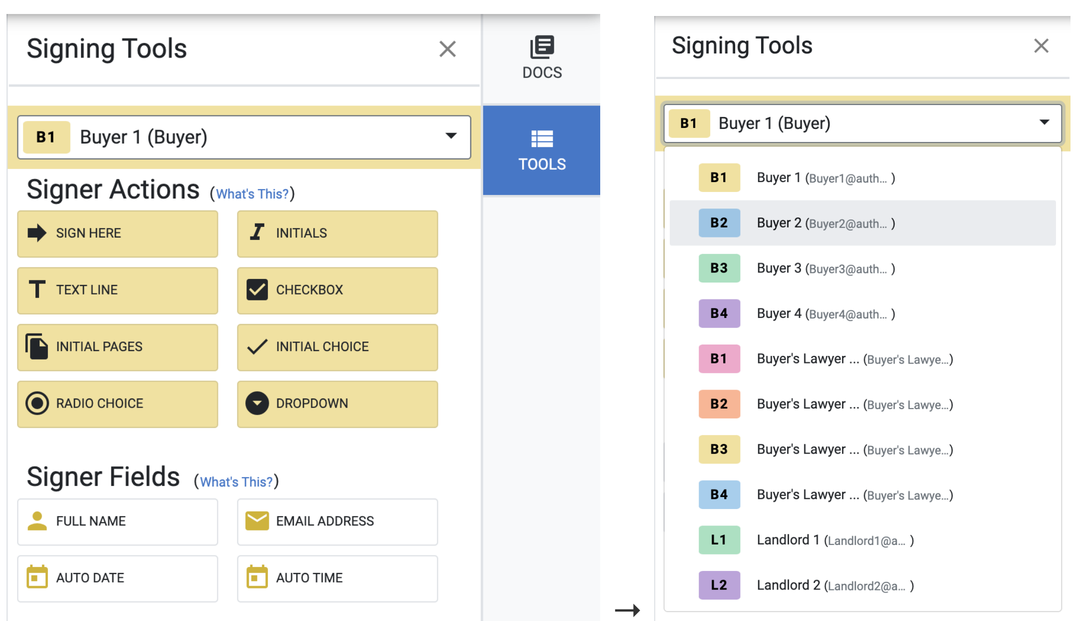
→

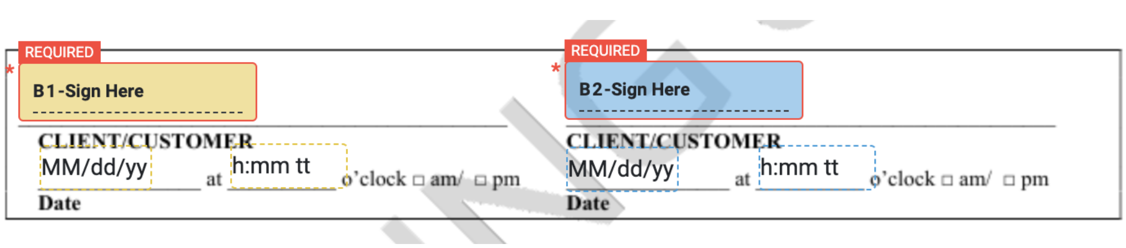


8. **My Files → Single Forms** holds **Individual Forms** from the Tennessee REALTORS® & **Transaction Forms** from previous transactions you have created.



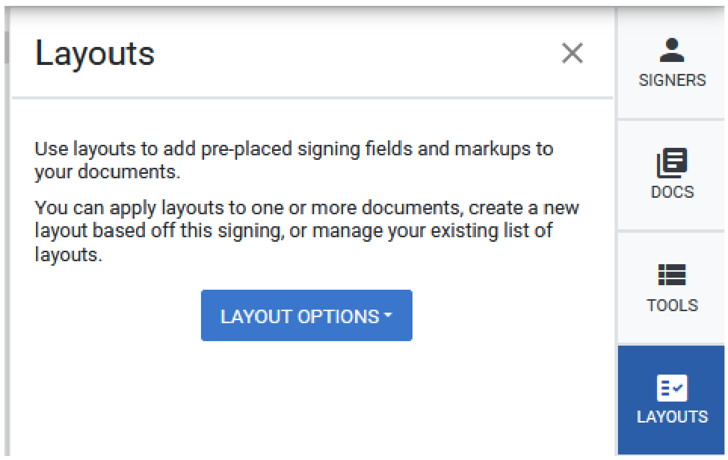
9. In Authentisign, select **Tools** and assign **Signer Actions** to the Form or Document.



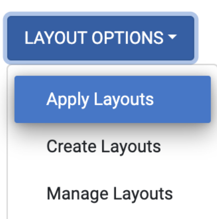


APPLYING A LAYOUT

1. Open a transaction from the navigation menu.
2. Start a new Authentisign by clicking **+Add**
3. Name the Signing
4. Add Signers *(you need at least one signer for Layouts to apply)*
5. Add Documents
6. In the toolbar, click **LAYOUTS**.



7. Select **Apply Layouts**



8. Select the **Layout Name** you would like to apply to the document.
9. Click **Assign Signature Layouts**

NOTES:

Transaction Desk Basic #4

CREATING AN E-SIGNING PACKET IN AUTHENTISIGN

Create a signing when you need to send documents and forms to be signed by various participants so you can successfully close a transaction.

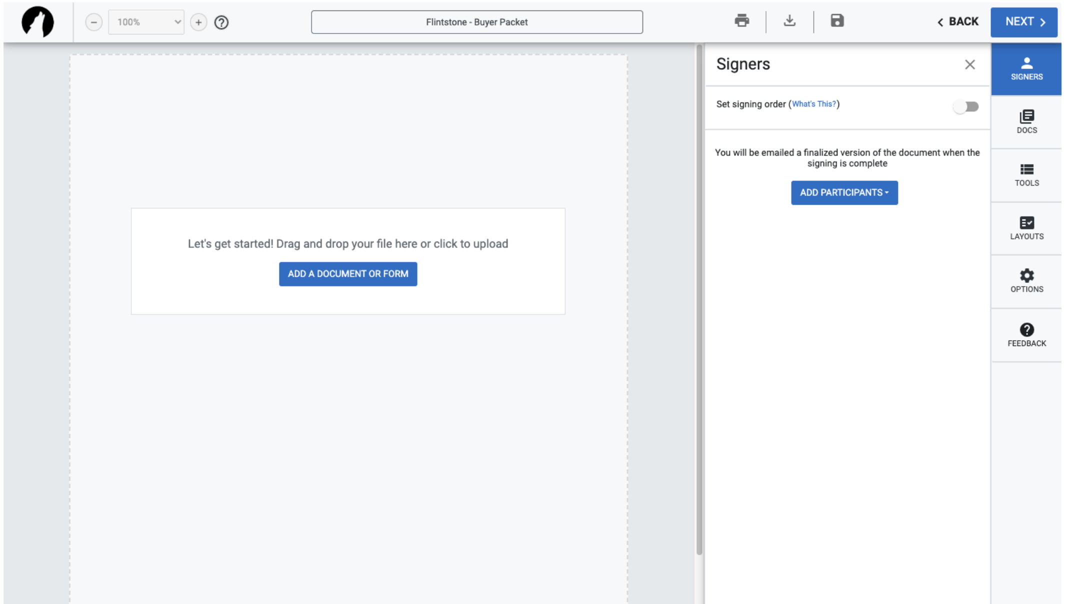
As the creator of the signing, you have the option to sign your documents before sending, in order to speed up the signing process. However, this option only applies to signing fields that you manually place, as opposed to those that are placed automatically as the result of applying a layout. If you need to sign layout fields, you must still add yourself as a signer-type participant and complete the signing after it is sent out, as per usual.

ACTIVITY

- Navigate to Signings from the Navigation bar, and click **+Add**.
  - The Send to **Create Signing** popup opens.

- Type a name for the signing in the **Signing Name** field that enables you to easily recognize the purpose of the signing. For example, you can use the property address or intended recipient's name.
- Click **Add to Transaction**, check the transaction you need, and click **Save** if you need to select one of your existing transactions to associate the signing with. ***Note****: You can associate the signing with a transaction at a later date if needed.*
- Click **Save**.

ADDING SIGNERS, FORMS, AND DOCUMENTS



- **SIGNERS:** **Add a participant to the signing.** For example, if you need to get a listing agreement signed, you can add the seller to the signing.
  Note: *Each signing must have a minimum of one Remote signer-type participant.*
- **DOCS:** **Add documents and/or forms to the signing.** For example, if you need to get a listing agreement signed, you can add it to the signing.
  Note: *Each signer-type participant must have at least one document or form to sign.*
- **TOOLS:** Add signing fields and markups, such as highlighting and strikeout to the documents and/or forms. For example, you can add places for the seller to sign their name, initial, and date the listing agreement.
  Note: *Each signer-type participant must have at least one signing field to sign on each document. The signing field must come from the Signing Actions section of the TOOLS panel.*
- **LAYOUTS:** Use layout to add pre-placed signing fields and markups to your documents.
- **OPTIONS:** You can set up additional options such as signing expiration dates and automated reminders.

If you need to save your signing and finish working on it, or send it at a later date, click **BACK**, and then click **Save**.

When you are finished adding participants, documents, and signing fields and are ready to send the signing to all participants, click **NEXT**.

ACTIVITY

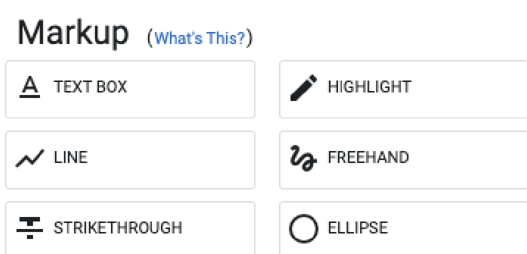
Your customer/client is ready to sign the forms and documents for their offer/listing. Think about which scenario you utilized in the previous activity, and tailor this activity to fit your scenario.

Then, do the following:

- Add Signers ➝ Ensure the customer/clients are **Remote Signers**. If there is another agent involved, you can add them and assign them to **CC**. If another decision maker is involved, but not signing documents, assign them as **Reviewer**.
- Add Documents needing signatures

REVIEW TOOLS

The markup tools allow you to mark on the documents before they are sent to the signers.



ACTIVITY

Text Box

- [ ] Scroll to a document that would require a **TEXT BOX** to be added.
- [ ] Click **TOOLS** ➝ Click **Text Box** ➝ Click on the document where the text box should be located.
- [ ] Change the font size, color, font family, alignment (as needed)
- [ ] Toggle **Bold**, *Italic*, and/or Transparent Background
- [ ] Click **Save as Default Settings**

Line

- [ ] Click **Line** from the tools
- [ ] Draw a line on the document ➝ Unclick **Line** from the tools
- [ ] Click the line on the document ➝ Change the color to **GREEN**
- [ ] Change the **Stroke Width** to 4
- [ ] Click **Save as Default Settings**

Strikethrough

- ☐ Click **Strikethrough**
- ☐ Draw on the document → Unclick **Strikethrough** from the tools
- ☐ Click on the strikethrough to open editing tools → Change color to **RED** → Change stroke width
- ☐ Try to move the line at an angle. *What happens?* ____
- ☐ Click on the **Line** and move at an angle. *What happens?* __________________________________

Highlight

- ☐ Click **Highlight**
- ☐ Draw on the document → Unclick **Highlight** from the tools
- ☐ Click on the highlighted section → Change color to **YELLOW** and Opacity to **0.25**
- ☐ Click **Save as Default Settings**

Freehand

- ☐ Click **Freehand**
- ☐ Draw on the document
- ☐ Click on freehand and move it around the document
- ☐ Click **DELETE**

Ellipse

- ☐ Click **Ellipse**
- ☐ Draw a circle around something on the document.
- ☐ Unclick **Ellipse** → Click on the circle and change the color to **BLUE**
- ☐ Move the circle to another item on the page and **shrink the circle** by dragging from the corner

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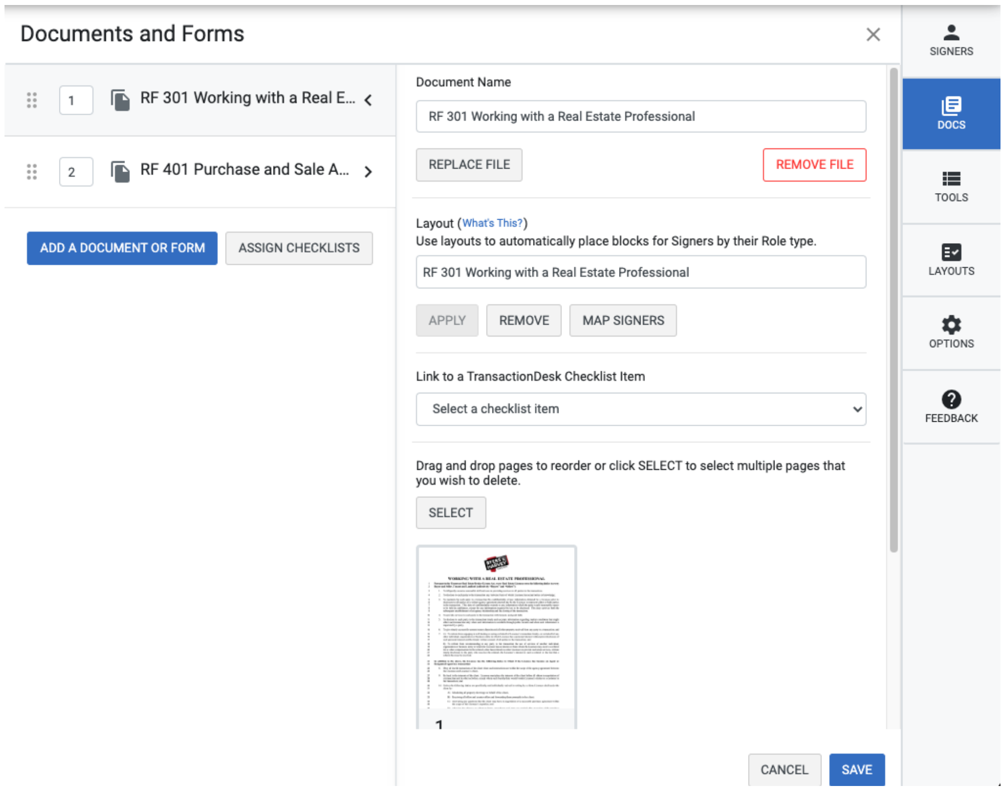
NOTES:

ADDING AND ARRANGING PAGES

When working on an e-signing you have the ability to add multiple documents to one signing, making it easier for the signers to click to sign all documents on one email.



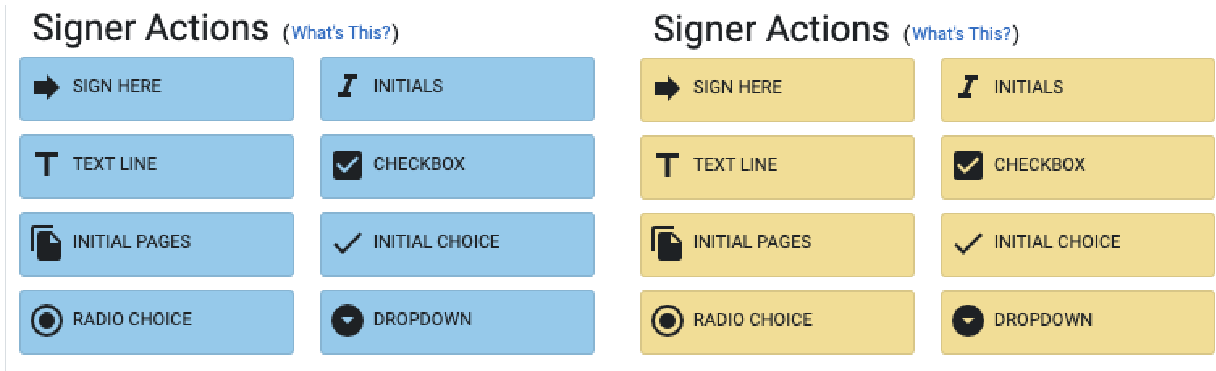
ACTIVITY

- ☐ Click on **Docs**
- ☐ Move the order of your documents around
    - ☐ Grab and Slide
    - ☐ Change the number in the box
- ☐ Click **Replace File** and change one of your documents/forms out for a different file
- ☐ Link the document to a **TransactionDesk Checklist Item**
- ☐ Grab a page and move it around with another page
- ☐ On the bottom of page 1, click on the …
    - ☐ Rotate the page 360 degrees
    - ☐ Click **View Page** *What happens?* ____
    - ☐ Click **Delete**
- ☐ Click **Remove File** *What happens?* ____

SIGNER ACTIONS

Signer actions assign to the signer you have selected and require their interaction to be complete. You can either click/tap or drag-and-drop to add to your document.

Note: Each signer is assigned their own color.



ACTIVITY

Select a signer from your list.

- [ ] Drag-and-Drop their **SIGN HERE** to a signature line on the document.
- [ ] Click/Tap their **Initials** onto the bottom right corner of the document
- [ ] On the top left corner, Drag-and-Drop the **Text Line**
  - [ ] *The text line will prompt the signer to fill in with their reply during their signing.*
  - [ ] Toggle **Required** on
  - [ ] Toggle **Transparent Background** on
  - [ ] Toggle **Multi-Line** on → Then, click and drag the corners of the text box to make a square.
  - [ ] Click **Duplicate** and move the second text line to the top right corner.
  - [ ] Click the duplicated text box → Select the **Trash Can** and **Delete** the duplicate
- [ ] Drag-and-Drop a **CHECKBOX** to an item on the document
- [ ] Click **INITIAL PAGES**
  - [ ] Adjust the initial size
  - [ ] Align the initials to the **Bottom Right** on the **Bottom of the Document**
  - [ ] Select all signers
  - [ ] Select documents requiring initials on every page
  - [ ] Click **Place Initials**

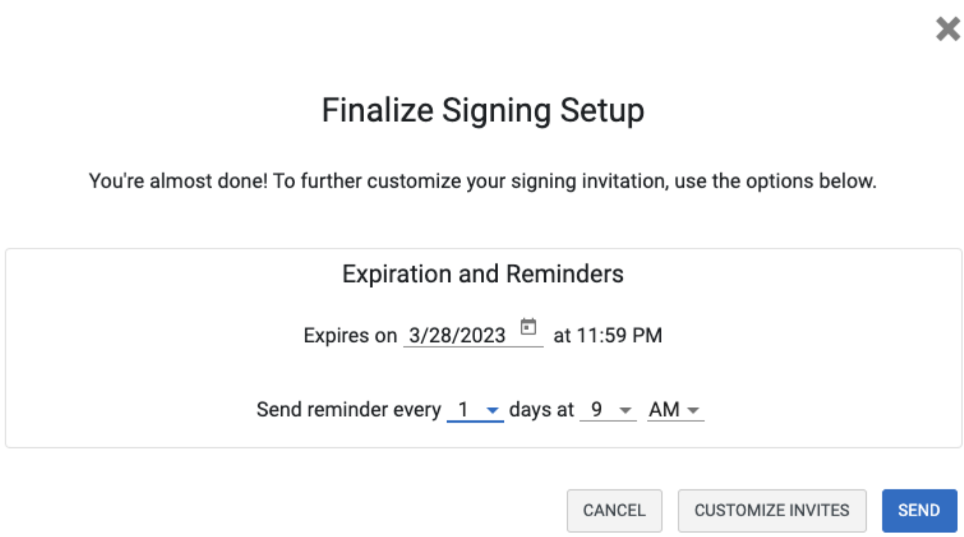
- ☐ Drag-and-Drop the **INITIAL CHOICE** to a blank space on the document
  - ☐ *This will prompt the signer to initial one or the other.*
- ☐ Drag-and-Drop the **RADIO CHOICE** to a blank space on the document
  - ☐ *This will prompt the signer to select one or the other.*
  - ☐ Click on one of the radio buttons →  and click the **+** button to ADD another radio choice button
  - ☐ Click the **trash can** button to delete the added radio button
  - ☐ Slide the **SCALE** bar in the right toolbar to make the radio button larger or smaller
    - ☐ If you'd like to keep these settings in place moving forward, click **Save as Default Settings**
  - ☐ Drag-and-Drop the **DROPDOWN** to a blank space on the document 

    - ☐ Enter a list of options in the **Define Options** dialog box
    - ☐ Toggle to Require or Not Require the dropdown

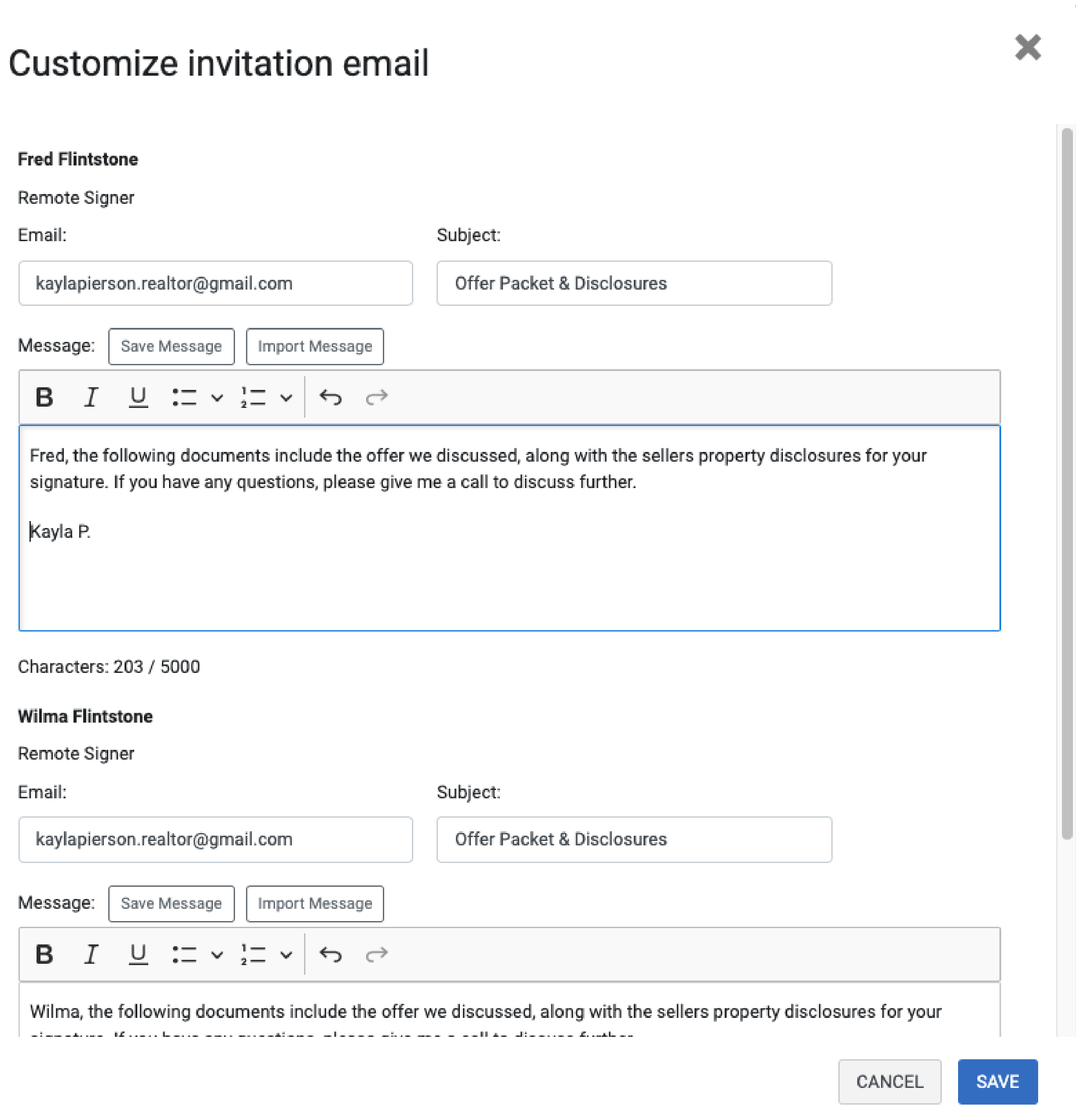
SENDING FOR E-SIGNATURES

In the top right corner, Click **NEXT** 

To set **Expirations and Reminders**, select a date and time when prompted.



Click on **Customize Invites** to personalize your message to the signer. Add a *Subject* and type a *personalized message* to the signer. When complete, click **Save**, and then click **Send**.



NOTES:

Transaction Desk Advanced #5

SPECIFY ADDITIONAL SIGNING OPTIONS

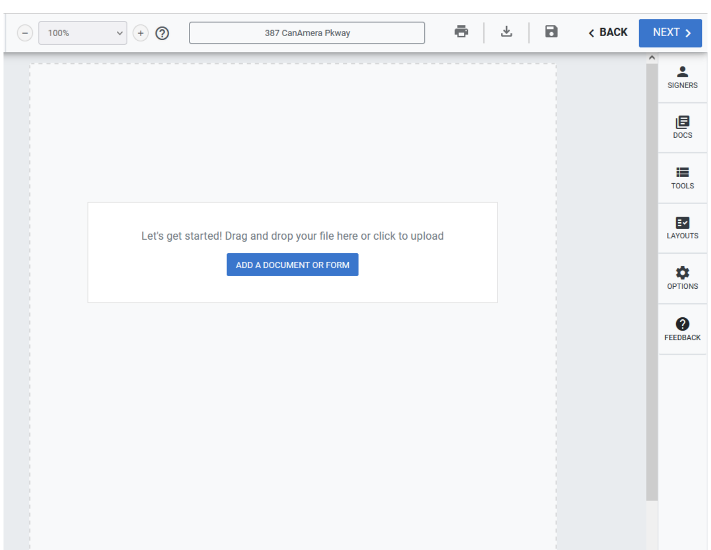
When creating a signing you can take the following actions for that specific signing:

- Update the e-signature and initials that you use when pre-signing documents before sending them to participants.
- Update the signing name.
- Set an expiration date for the signing that all participants must complete the signing by.
- Arrange for automatic email reminders to be sent to participants at pre-arranged intervals.
- Set the position that the New Authentisign identification number will occupy on each page of each document in the signing. The ID number is unique and is automatically added to each signing.
- Clear all signing fields, annotations, and markups that you have already added to the signing, including those applied as part of a layout.

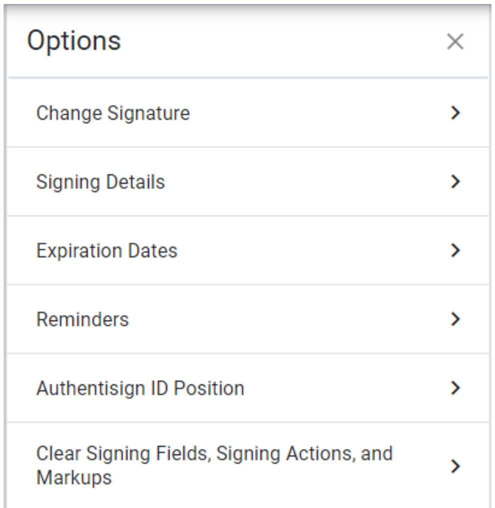
Note*: You can only specify these details before the signing is sent.*

ACTIVITY

Navigate to **Signings** and click the name of the signing you need to specify additional details for.



☐ In the toolbar, click **OPTIONS**.



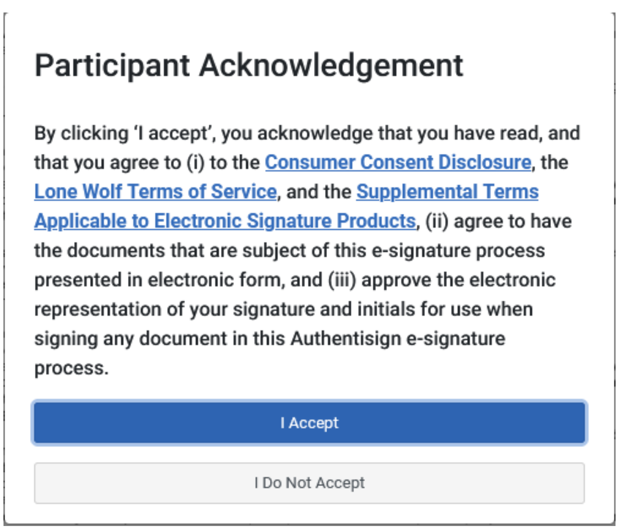
☐ In the Options panel, do the following:

- ☐ Update your e-signature for pre-signing documents
- ☐ Update the name of the signing
- ☐ Set an expiration date for the signing
- ☐ Set an automated signing reminder
- ☐ Update the New Authentisign ID position
- ☐ Clear signing fields and markups

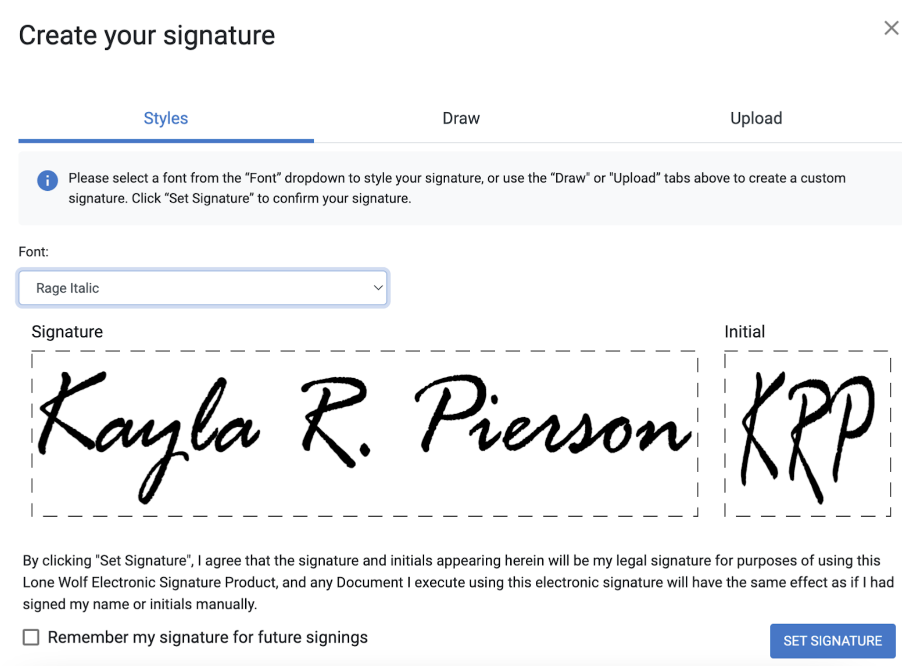
Update your E-Signature for Pre-Signing Documents

1. Click **Change Signature**.

   The Participant Acknowledgment popup opens.

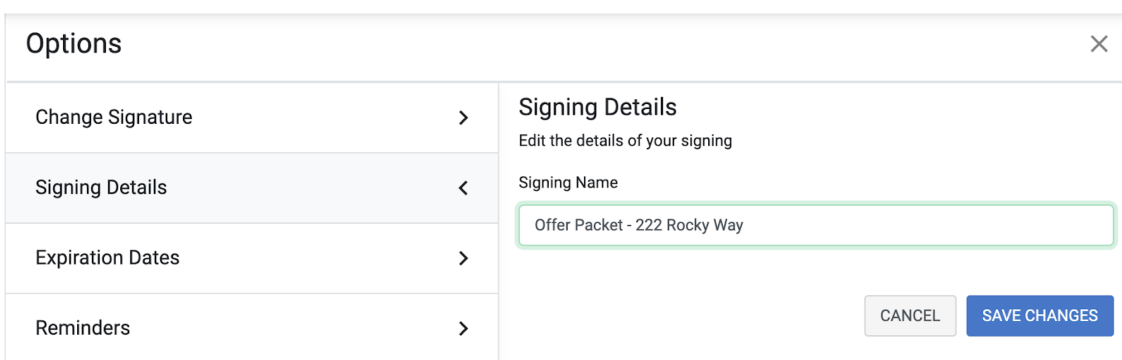


2. Click **I ACCEPT**.
3. Select the **Font** desired, **Draw** your signature, or **Upload** a signature.
4. Check the box **Remember my signature for future signatures.**
5. Click **Set Signature.**



Update the Name of the Signing

1. Click **Signing Details**.
2. Type the updated name of the signing in the **Signing Name** field and click **SAVE CHANGES**.

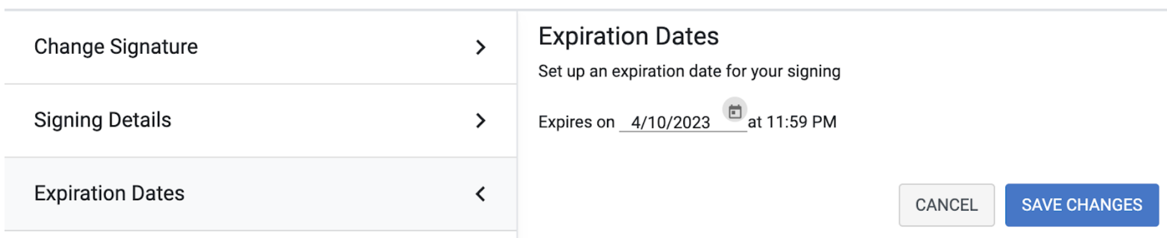


Set an Expiration Date for the Signing

1. Click **Expiration Dates**.
2. Use the calendar menu to select the date and time that the signing expires.

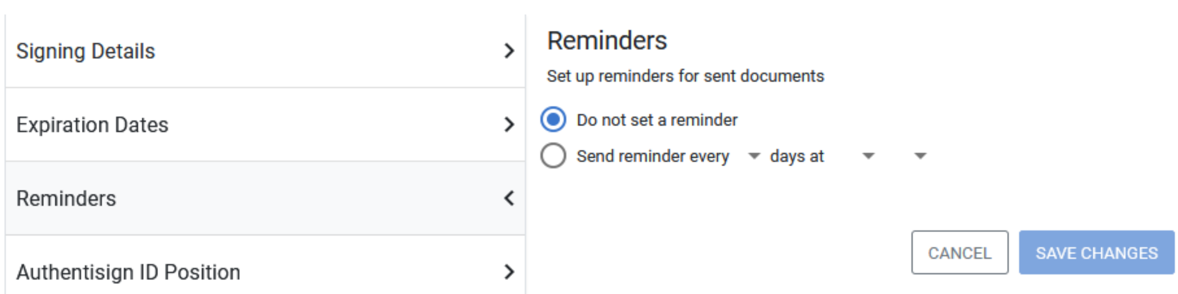
   Notes:

   - Every signing must have an expiry date.
   - Expiry dates are set for 30 days from the current date by default, but can be set to any date you need.
   - The signing always expires at 11:59 PM on the date specified.
   - When a signing expires, participants that try to access the signing after the expiry date receive a notice that the signing expired and cannot complete the signing.
3. Click **SAVE CHANGES**.

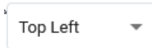


Set an Automated Signing Reminder

1. Click **Reminders**.
2. Select **Send reminder every**, and use the dropdowns to select how often and at what time of day the reminders are sent.
3. Click **SAVE CHANGES**.

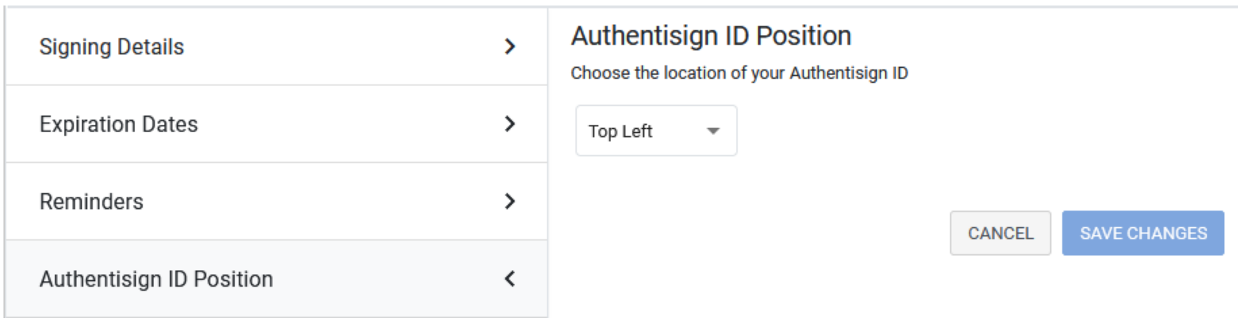


Update the New Authentisign ID Position

1. Click **Authentisign ID Position**.
2. Use the position dropdown 

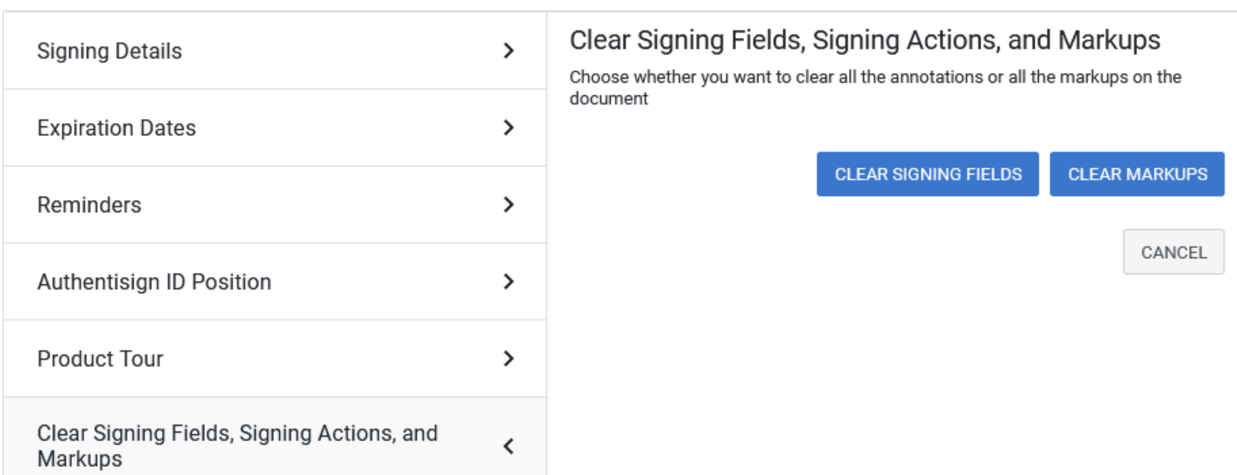
to select whether you need the New Authentisign ID number in the top left, top right, bottom left, or bottom right of each page of each document.

   Note: *By default, the ID is placed in the top left corner of each page of each document.*
3. Click **SAVE CHANGES**.



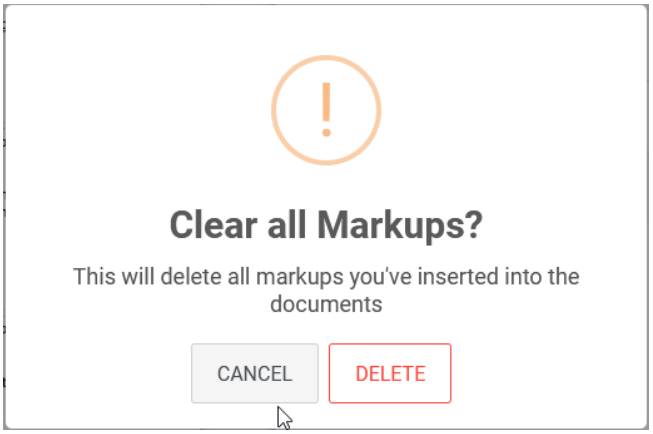
Clear Signing Fields and Markups

1. Click **Clear Signing Fields and Markups**.



2. Do any of the following:
   - ☐ Click **CLEAR SIGNING FIELDS** if you need to remove any signing fields, such as initial fields, from all pages of all documents.
   - ☐ Click **CLEAR MARKUPS** if you need to remove any markup fields, such as highlighting, from all pages of all documents.

3. The Clear all markups popup opens and prompts you to confirm that you need to remove the signing fields or markups.



4. Click **DELETE**.

   The signing and markup fields are removed from all pages of all documents.

   ***Note**: This includes all fields that were added from a layout.*

NOTES: