

TRANSACTION DESK ADVANCED



A L I G N E D A X I S
VISION | EXECUTION | RESULTS

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#1: CREATE TEMPLATES

*This section will show you how to **create and use Checklists & Templates**.*

1. Create Template
 - a. Add Checklist
 - b. Add Contacts
 - c. Add Documents & Forms
 - d. Attach to Teams/Sharing
2. Add a Template to a new Transaction
3. Add a Template to an existing Transaction

#2: AUTHENTISIGN LAYOUTS

*This section will demonstrate how to **add your own documents** and effectively use them with **Layouts in Authentisign**.*

1. Creating Layouts
2. Applying Layouts

#3: SPECIFY ADDITIONAL SIGNING OPTIONS

*This section describes 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

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.

Close

Create

Save

Ownership:

Personal ▼

Name *

Type

- None - ▼

Description

Description

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**.

Transaction Template

Detail

Ownership:

Personal

Name *

Residential Listings

Type

Residential Listing

Description

Description

Update

Checklists

+

Contacts

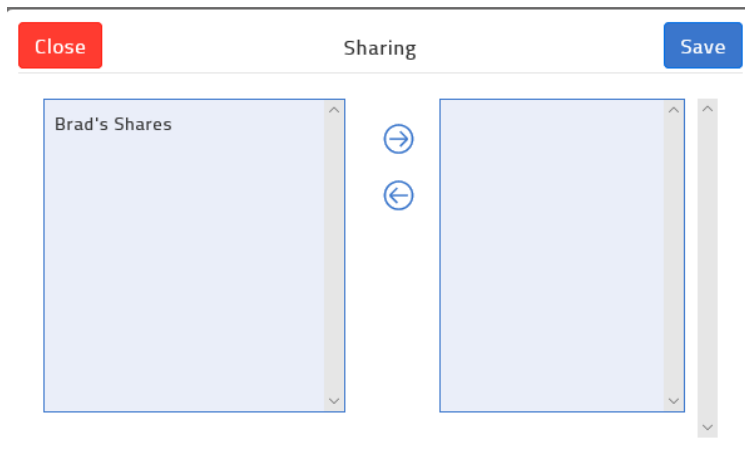
+

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**

Close Create Transaction Create

Name * Training - 123 Maple Street

Template TRAINING: Residential: Buyer Packet ▼


Import Data (optional) RealTracs (Web API) ▼

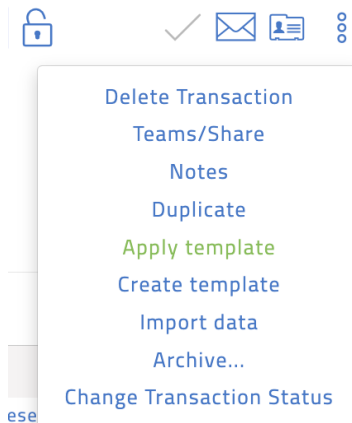
123456

Add me as the Selling Agent ▼

☒ Use Wizard

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

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:

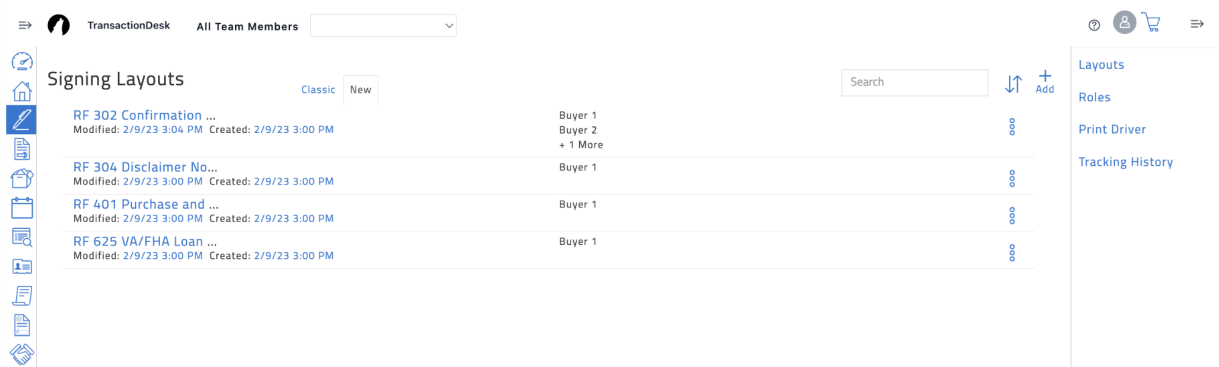
- Your layout must have a minimum of:
 - 1 document
 - 1 Signer-type participant (or a Myself participant)
 - 1 Signing field

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**.

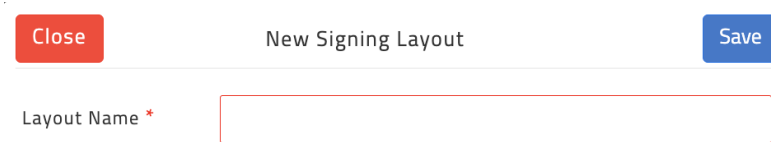


The screenshot shows the TransactionDesk application interface. At the top, there's a header with 'TransactionDesk' and 'All Team Members'. Below this is a navigation bar on the left with various icons. The main content area is titled 'Signing Layouts' and contains a table with the following data:

Document Name	Modified	Created	Participants	Actions
RF 302 Confirmation ...	2/9/23 3:04 PM	2/9/23 3:00 PM	Buyer 1 Buyer 2 + 1 More	ooo
RF 304 Disclaimer No...	2/9/23 3:00 PM	2/9/23 3:00 PM	Buyer 1	ooo
RF 401 Purchase and ...	2/9/23 3:00 PM	2/9/23 3:00 PM	Buyer 1	ooo
RF 625 VA/FHA Loan ...	2/9/23 3:00 PM	2/9/23 3:00 PM	Buyer 1	ooo

On the right side, a menu is open showing options: Layouts, Roles, Print Driver, and Tracking History.

3. Click **+Add**.

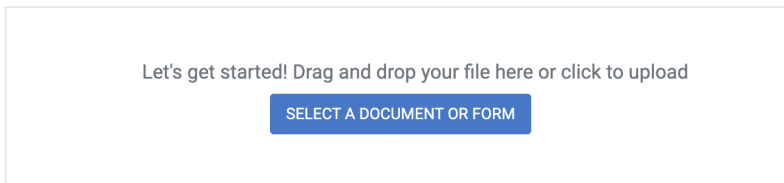


Close New Signing Layout Save

Layout Name *

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**

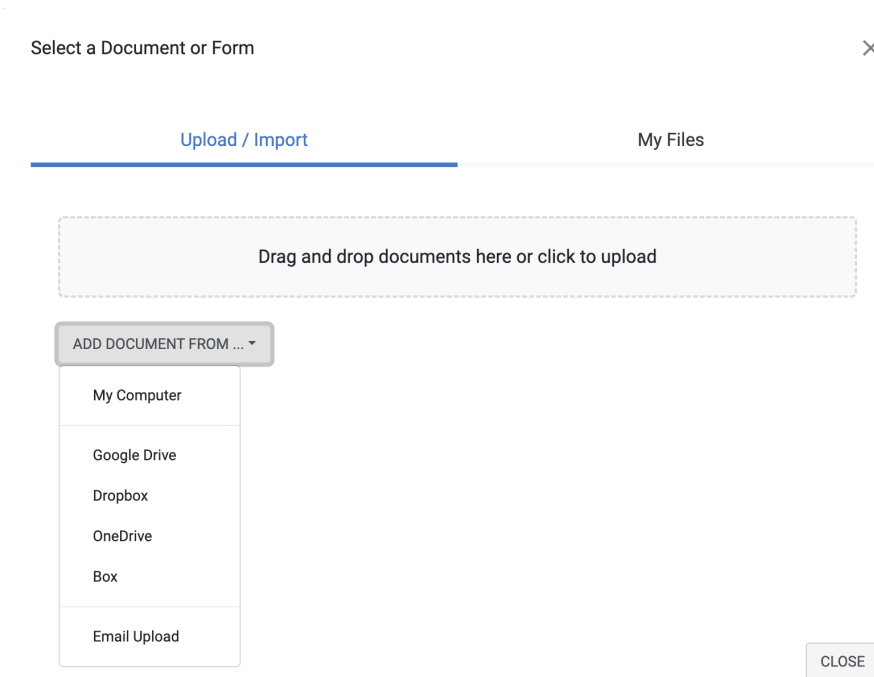


Let's get started! Drag and drop your file here or click to upload

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.



Select a Document or Form X

Upload / Import My Files

Drag and drop documents here or click to upload

ADD DOCUMENT FROM ... ▾

- My Computer
- Google Drive
- Dropbox
- OneDrive
- Box
- Email Upload

CLOSE

☐ 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**

Email Upload Information

You can use the Authentisign email contact below to forward any document file (pdf, doc, xls) or image file (jpg, png, gif) to be signed.

[Open in Email Client](#)

Email : layout_0d3a1b75-10c0-ed11-ba77-14cb652f4f5b@uploads.authentisign.com

CLOSE

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

Select a Document or Form

×

Upload / Import

My Files

All Documents

Documents

>

Single Forms

>

All Documents / Documents

Inbox Folder

My Folders

Shared Documents

Transaction Folder

CLOSE



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

Select a Document or Form ×

Upload / Import My Files

All Documents

Documents >

Single Forms >

All Documents / Single Forms

Individual Forms

Transaction Forms

CLOSE →

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

Signing Tools ×

DOCS

TOOLS

B1 Buyer 1 (Buyer)

Signer Actions (What's This?)

SIGN HERE INITIALS

TEXT LINE CHECKBOX

INITIAL PAGES INITIAL CHOICE

RADIO CHOICE DROPDOWN

Signer Fields (What's This?)

FULL NAME EMAIL ADDRESS

AUTO DATE AUTO TIME

Signing Tools ×

B1 Buyer 1 (Buyer)

B1 Buyer 1 (Buyer1@auth...)

B2 Buyer 2 (Buyer2@auth...)

B3 Buyer 3 (Buyer3@auth...)

B4 Buyer 4 (Buyer4@auth...)

B1 Buyer's Lawyer ... (Buyer's Lawye...)

B2 Buyer's Lawyer ... (Buyer's Lawye...)

B3 Buyer's Lawyer ... (Buyer's Lawye...)

B4 Buyer's Lawyer ... (Buyer's Lawye...)

L1 Landlord 1 (Landlord1@a...)

L2 Landlord 2 (Landlord2@a...)

REQUIRED

B1-Sign Here

CLIENT/CUSTOMER

MM/dd/yy at h:mm tt o'clock ☐ am/ ☐ pm

Date

REQUIRED

B2-Sign Here

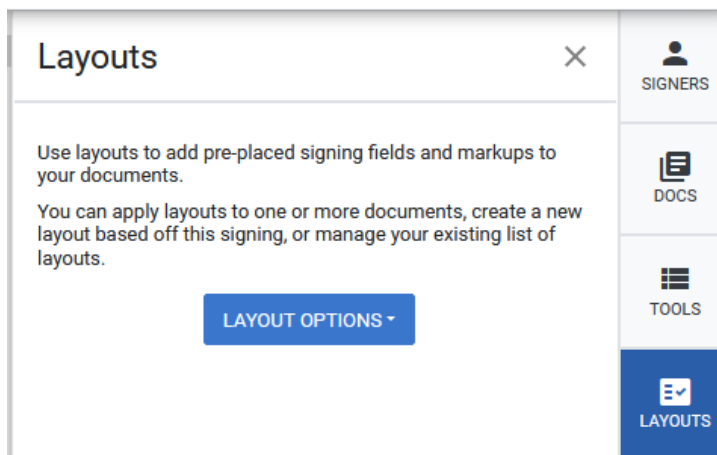
CLIENT/CUSTOMER

MM/dd/yy at h:mm tt o'clock ☐ am/ ☐ pm

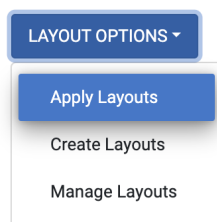
Date

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 Advanced #3

SPECIFY ADDITIONAL SIGNING OPTIONS

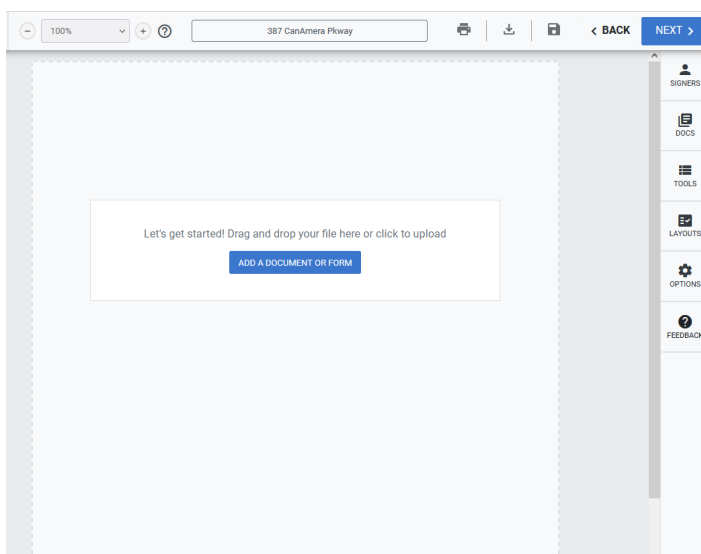
When creating a signing you can take the following actions for that specific signing:

- 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.

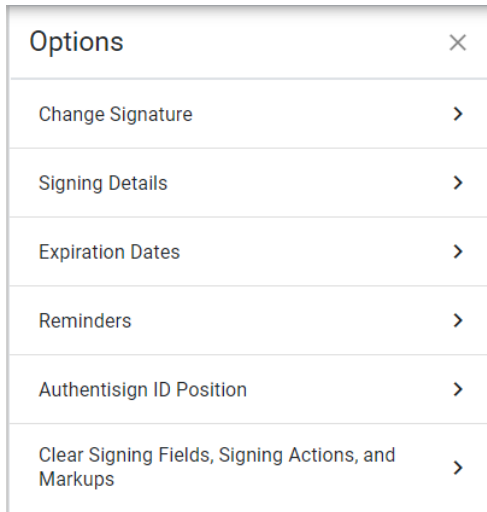
Note: You can only specify these details before the signing is sent.

ACTIVITY

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



- ☐ In the toolbar, click **OPTIONS**.



The screenshot shows a panel titled "Options" with a close button (X) in the top right corner. The panel contains a list of settings, each with a right-pointing arrow:

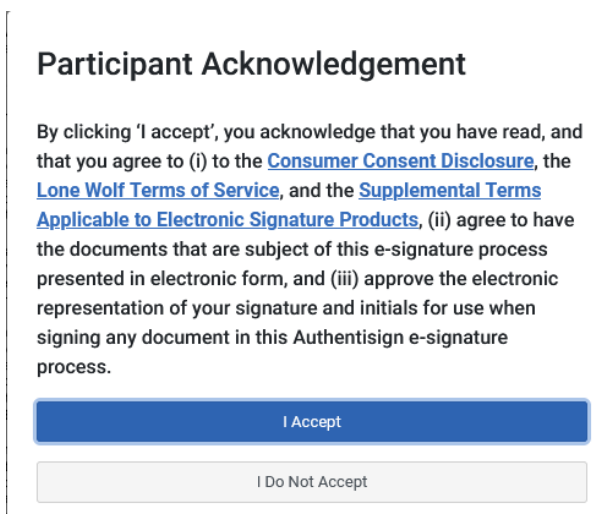
- Change Signature
- Signing Details
- Expiration Dates
- Reminders
- Authentisign ID Position
- Clear Signing Fields, Signing Actions, and Markups

- ☐ 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.



The screenshot shows a "Participant Acknowledgement" popup. It contains the following text:

Participant Acknowledgement

By clicking 'I accept', you acknowledge that you have read, and that you agree to (i) to the [Consumer Consent Disclosure](#), the [Lone Wolf Terms of Service](#), and the [Supplemental Terms Applicable to Electronic Signature Products](#), (ii) agree to have the documents that are subject of this e-signature process presented in electronic form, and (iii) approve the electronic representation of your signature and initials for use when signing any document in this Authentisign e-signature process.

At the bottom, there are two buttons:

- I Accept** (highlighted in blue)
- I Do Not Accept** (grayed out)

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**.

Create your signature

×

Styles

Draw

Upload

Please select a font from the "Font" dropdown to style your signature, or use the "Draw" or "Upload" tabs above to create a custom signature. Click "Set Signature" to confirm your signature.

Font:

Rage Italic

▼

Signature

Initial

Kayla R. Pierson

KRP

By clicking "Set Signature", I agree that the signature and initials appearing herein will be my legal signature for purposes of using this Lone Wolf Electronic Signature Product, and any Document I execute using this electronic signature will have the same effect as if I had signed my name or initials manually.

☐ Remember my signature for future signings

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**.

Options

×

Change Signature

>

Signing Details

<

Expiration Dates

>

Reminders

>

Signing Details

Edit the details of your signing

Signing Name

Offer Packet - 222 Rocky Way

CANCEL

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**.

Change Signature >	Expiration Dates Set up an expiration date for your signing
Signing Details >	Expires on <u>4/10/2023</u>  at 11:59 PM
Expiration Dates <	<div>CANCEL</div> <div>SAVE CHANGES</div>


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**.

Signing Details >	Reminders Set up reminders for sent documents
Expiration Dates >	<input checked="" type="radio"/> Do not set a reminder
Reminders <	<input type="radio"/> Send reminder every ▼ days at ▼ ▼
Authentisign ID Position >	<div>CANCEL</div> <div>SAVE CHANGES</div>

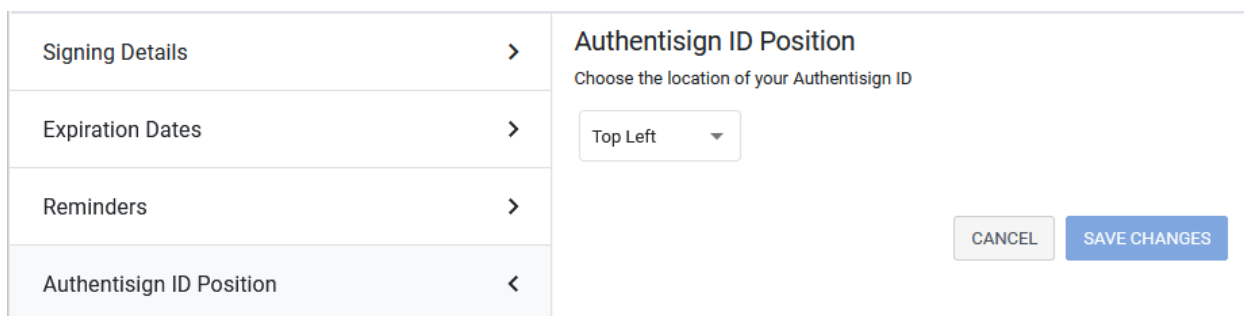
Update the New Authentisign ID Position

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**.



Signing Details	>
Expiration Dates	>
Reminders	>
Authentisign ID Position	<

Authentisign ID Position

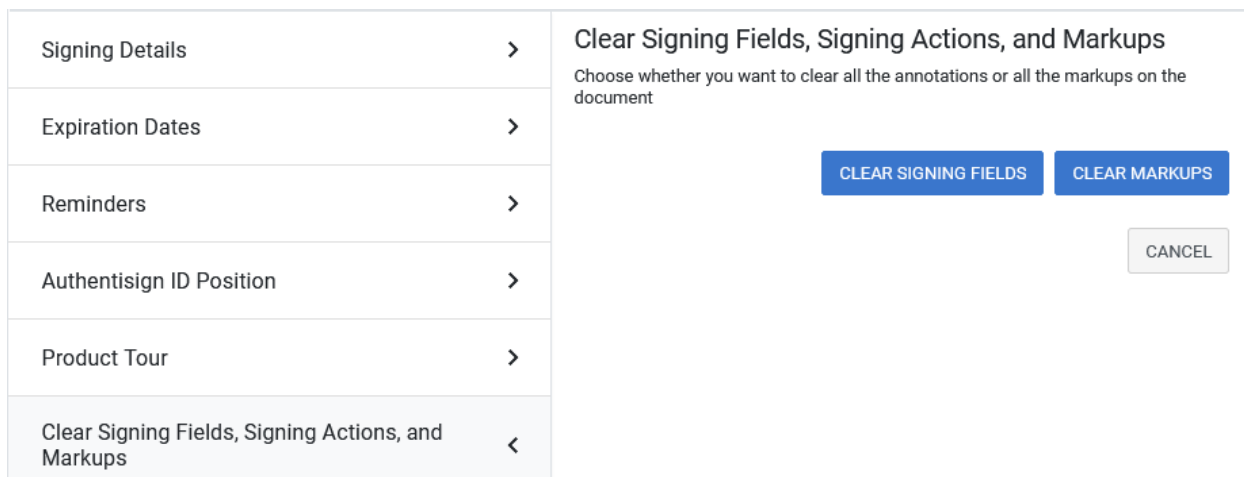
Choose the location of your Authentisign ID

Top Left ▼

CANCEL SAVE CHANGES

Clear Signing Fields and Markups

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



Signing Details	>
Expiration Dates	>
Reminders	>
Authentisign ID Position	>
Product Tour	>
Clear Signing Fields, Signing Actions, and Markups	<

Clear Signing Fields, Signing Actions, and Markups

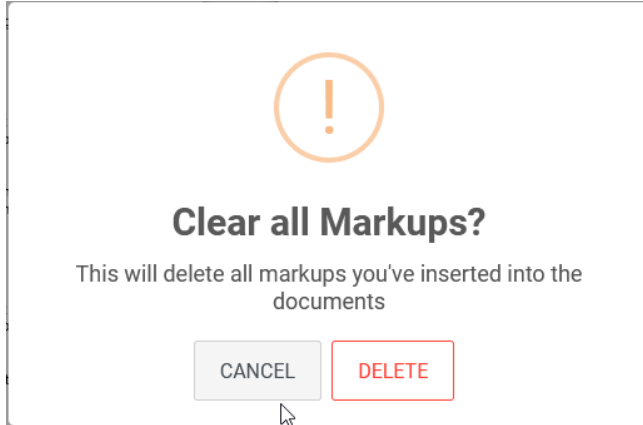
Choose whether you want to clear all the annotations or all the markups on the document

CLEAR SIGNING FIELDS CLEAR MARKUPS

CANCEL

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: