TRANSACTION DESK
ADVANCED

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Transaction Desk Advanced

#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

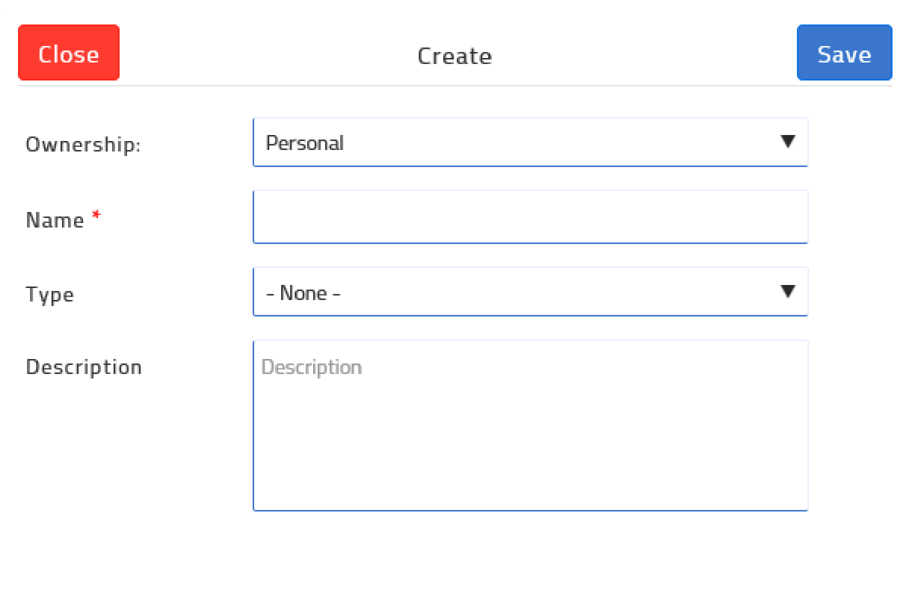
You require TransactionDesk Edition for brokers, and you require Super User access to create transaction templates for an office. You can, however, share a transaction template with your team members using the Sharing option.

Notes:

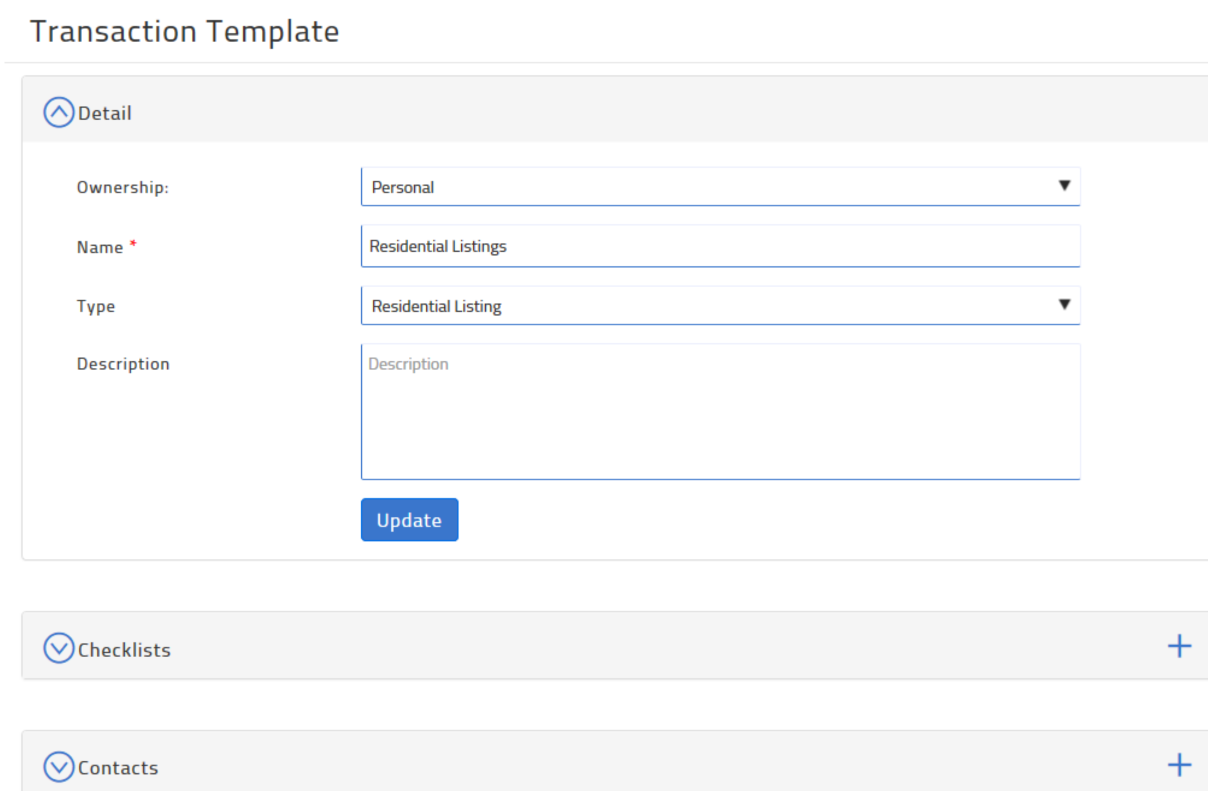
- Before you can share a transaction template with a group or team, the group or team must first be defined.
- Before you can add a checklist to a template, the checklist template must be defined.

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.



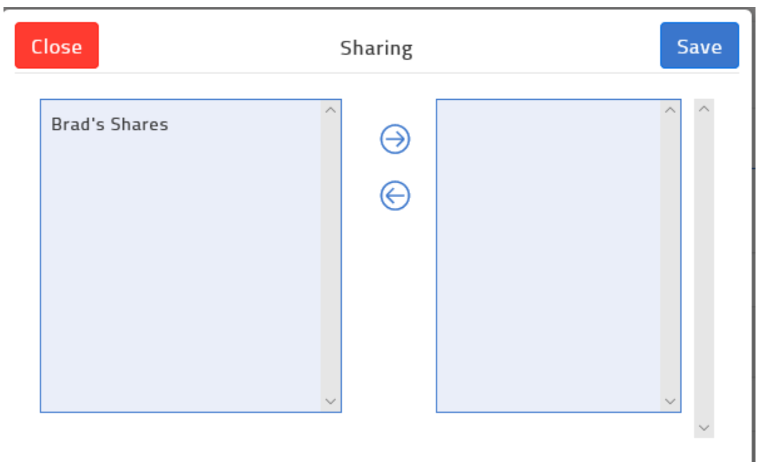
4. Use the **Ownership** dropdown to select who owns this template: **Personal** if it is for your own use, or to be shared with your team, or **PRINCIPAL/MANAGING BROKERS ONLY: Office** if it is to be available to all agents in the office.
5. In the **Name** field, give the template a meaningful name, 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**.

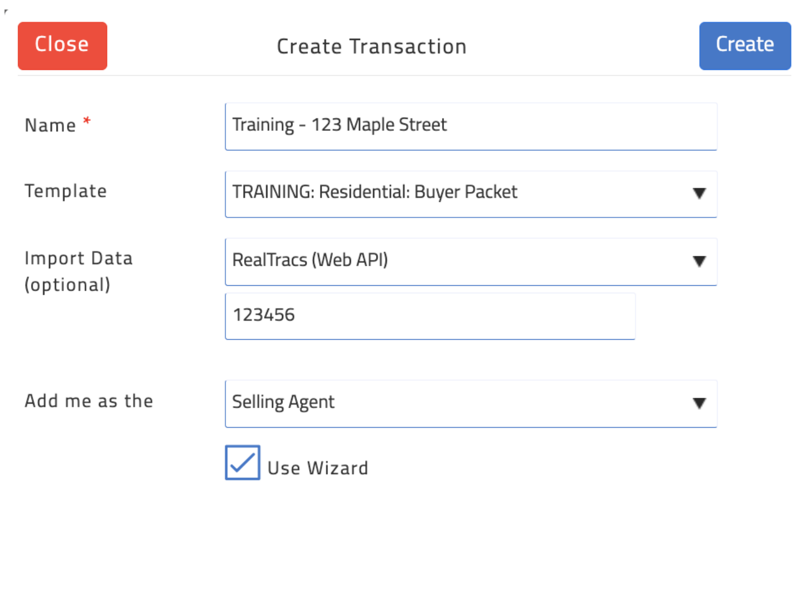
12. To add the forms that are typically required for this type of transaction, in the **Forms** section, click **+** and locate and select (check) the forms. Click **Add**. Any transactions created from this template have the forms attached automatically.
Notes:
    a. You can click more options, and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

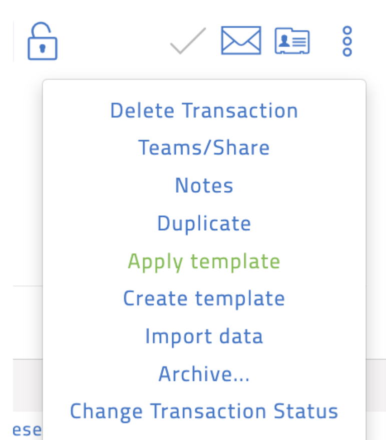
ADD A TEMPLATE TO A NEW TRANSACTION

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

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.

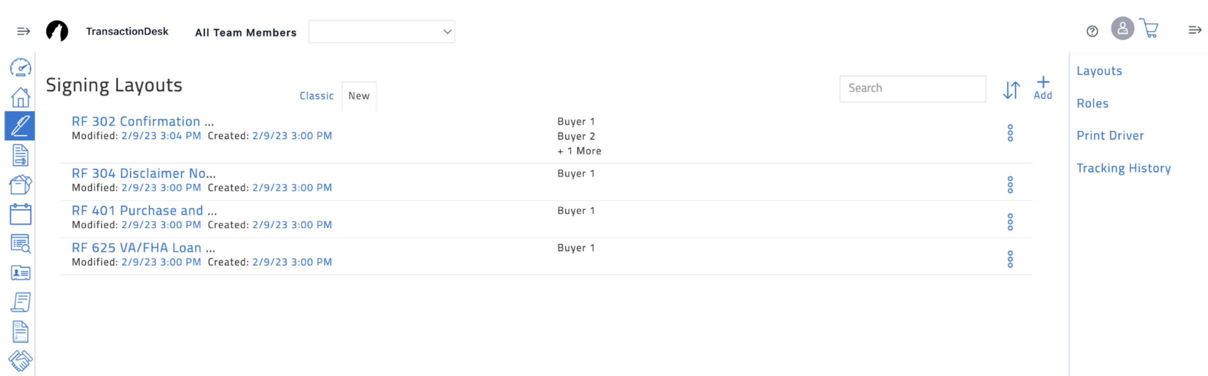
Notes:

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

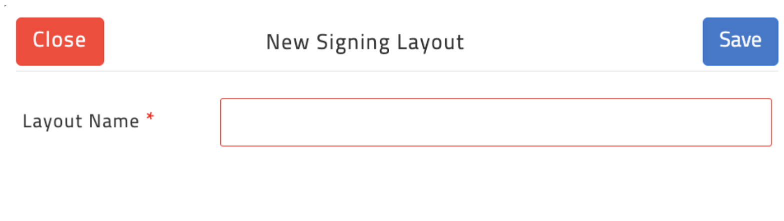
CREATING A LAYOUT

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

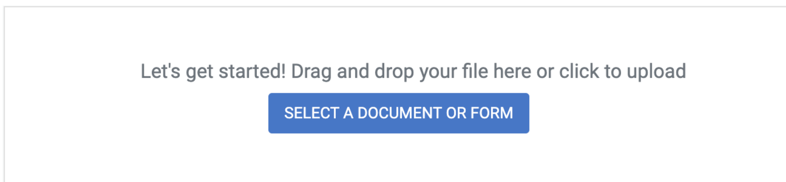
2. Open the right hand menu in the upper right corner , and select **Layouts**.



3. Click **+Add**.

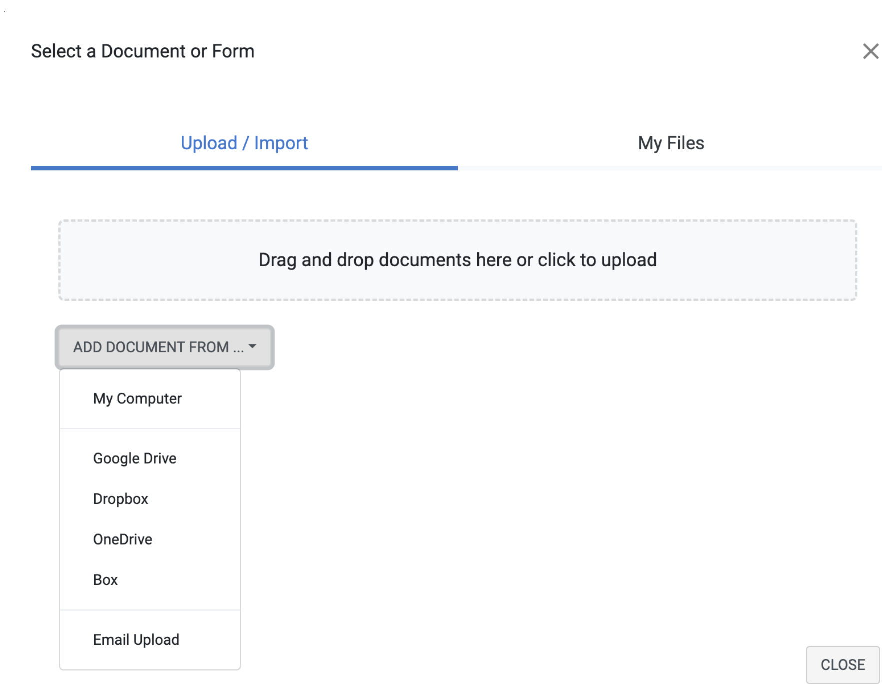


4. Type a name for the layout so you can easily locate it later in the Layout Name field.
5. Click **Select a Document or Form**

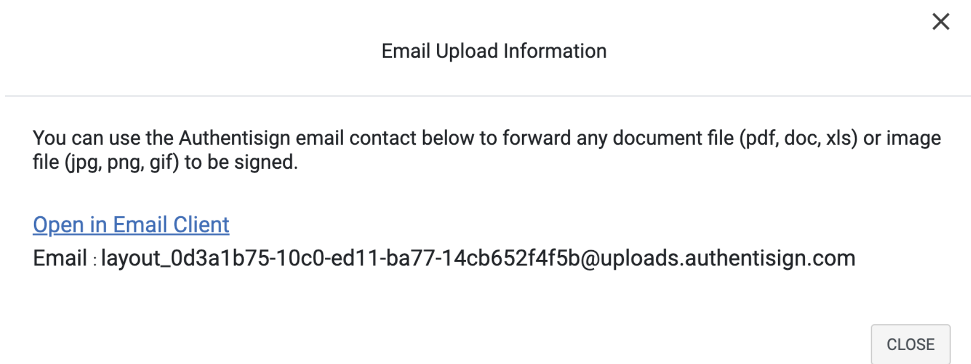


6. Do one of the following:

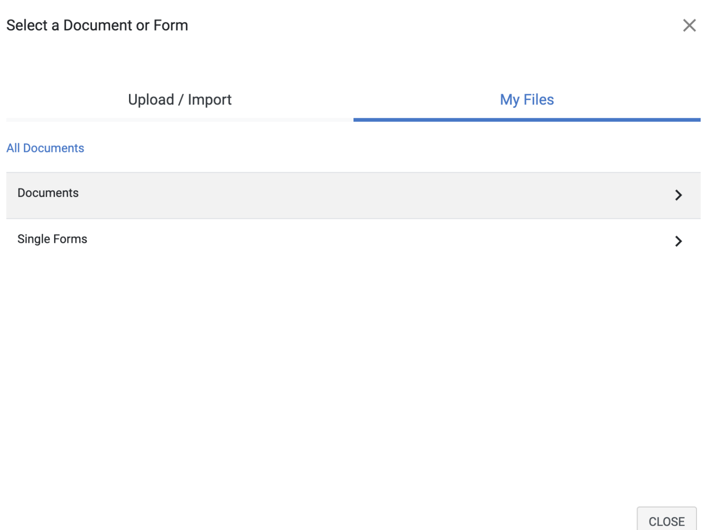
- ☐ Click **Drag & Drop files here or click to upload** to select the document from your computer's file manager.
- ☐ Drag and drop documents from your computer into the Drag & Drop files here or click to upload area.

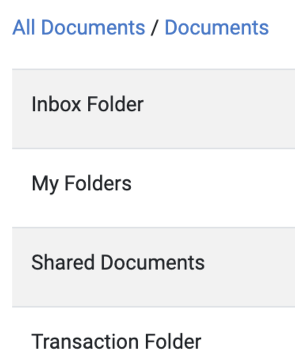


- [ ] Click **Add Document From…**
    - [ ] Click **My Computer** to select the document from your computer's file manager.
    - [ ] Click **Google Drive, Dropbox**, **One Drive,** or **Box** to select the document from your cloud-based accounts.
    - [ ] Click **Email Upload**

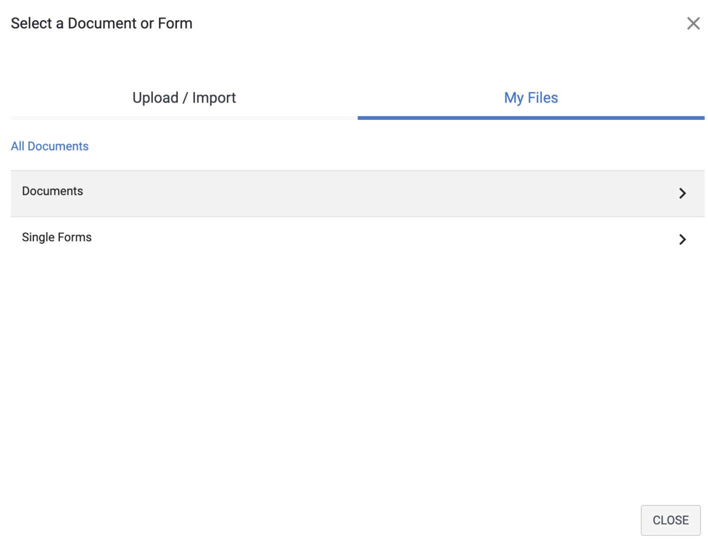


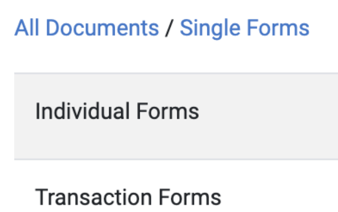
7. Additional Documents can be found under **My Files** → **Documents**



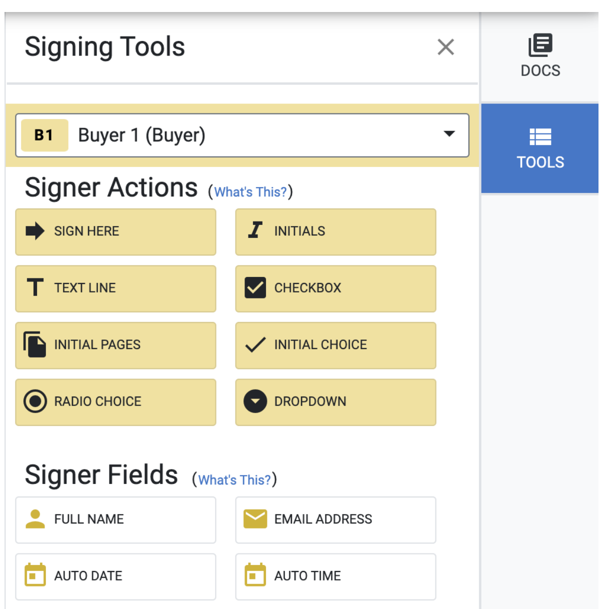


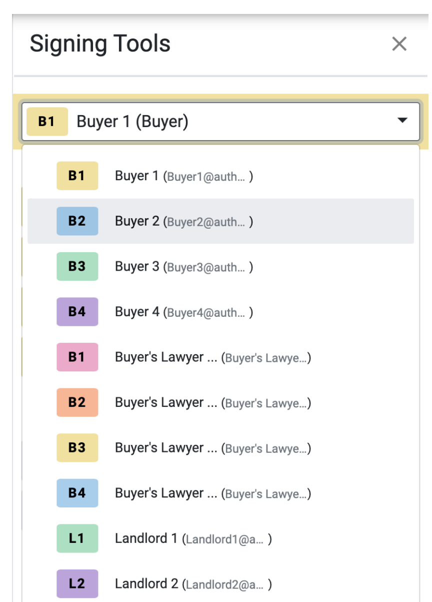
8. **My Files → Single Forms** holds **Individual Forms** from the Tennessee REALTORS® & **Transaction Forms** from previous transactions you have created.

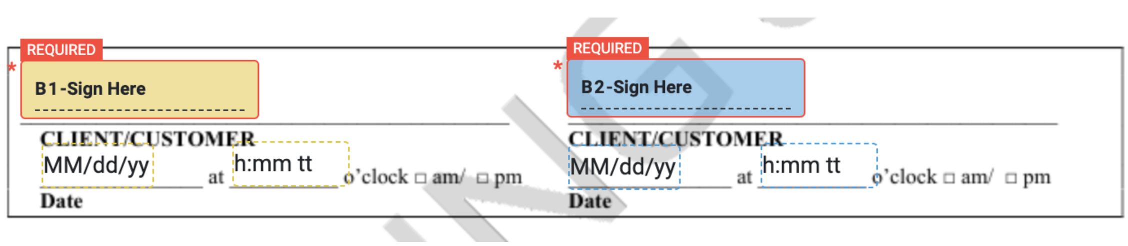




9. In Authentisign, select **Tools** and assign **Signer Actions** to the Form or Document.

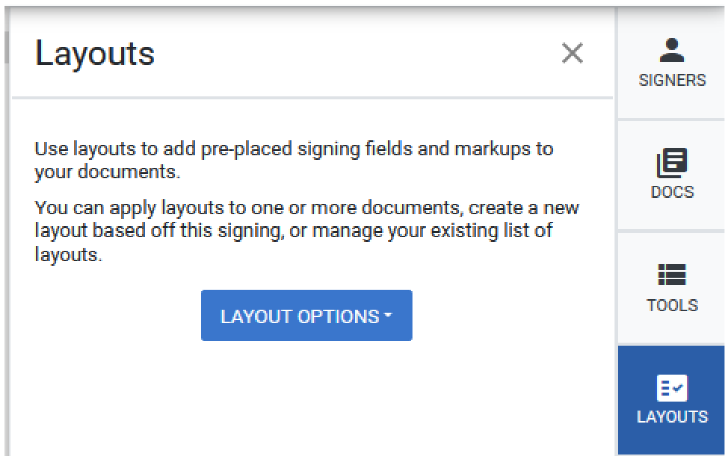




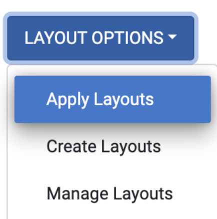


APPLYING A LAYOUT

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 Advanced #3

SPECIFY ADDITIONAL SIGNING OPTIONS

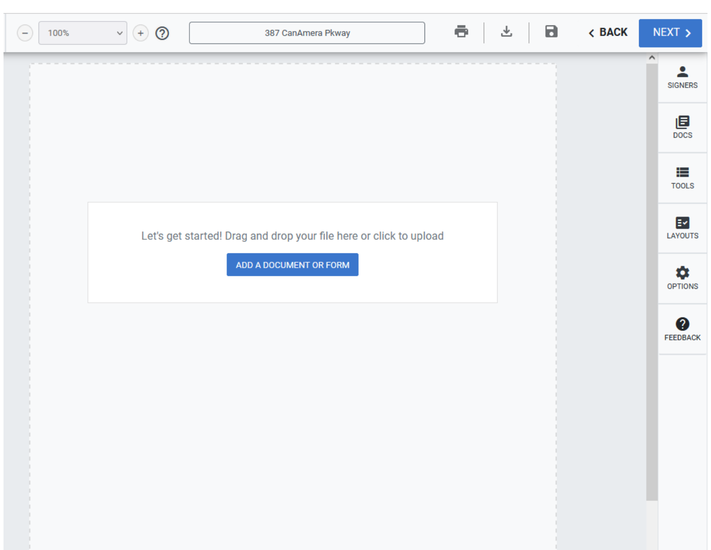
When creating a signing you can take the following actions for that specific signing:

- 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.

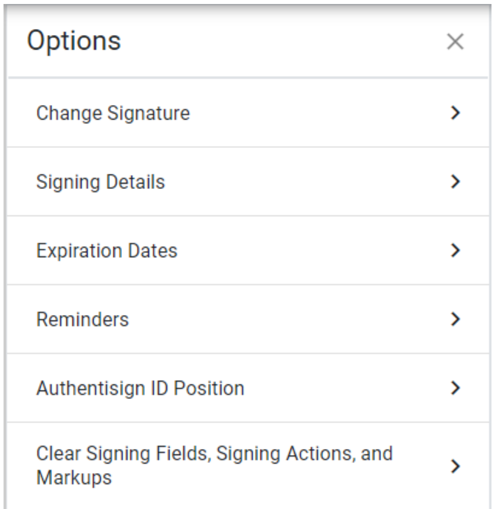
***Note**: You can only specify these details before the signing is sent.*

ACTIVITY

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



☐ In the toolbar, click **OPTIONS**.



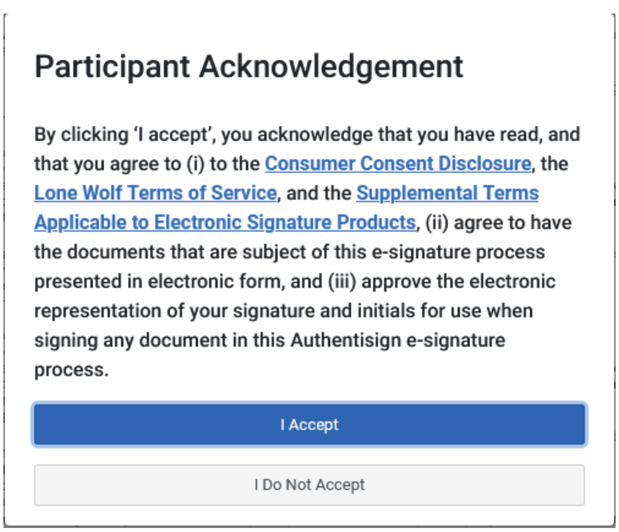
☐ In the Options panel, do the following:

- ☐ 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

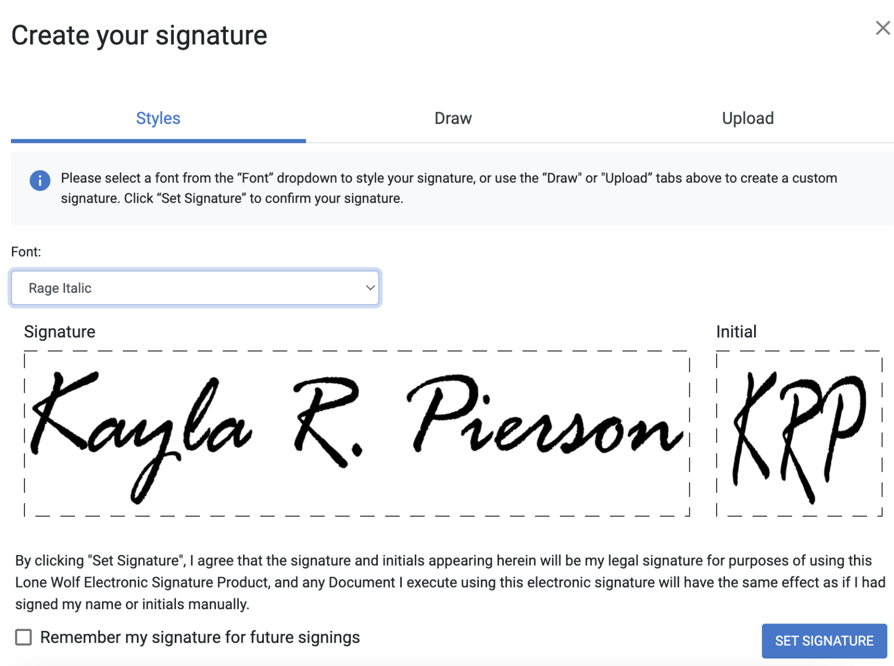
Update your E-Signature for Pre-Signing Documents

1. Click **Change Signature**.

   The Participant Acknowledgment popup opens.

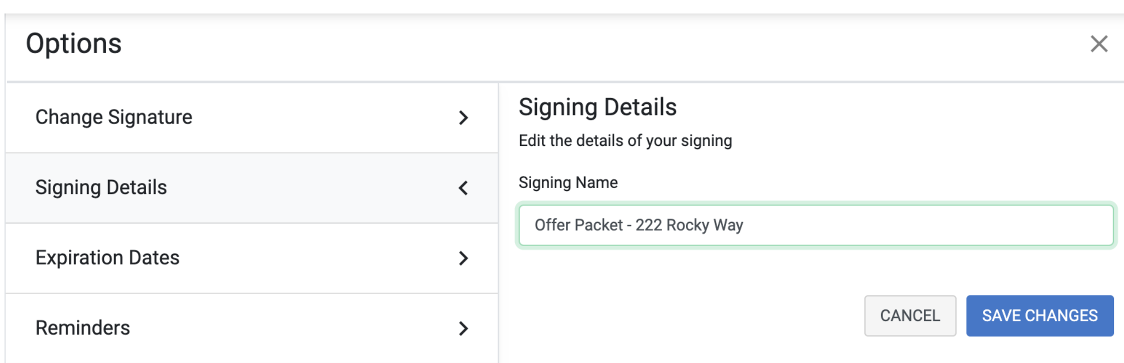


2. Click **I ACCEPT**.
3. Select the **Font** desired, **Draw** your signature, or **Upload** a signature.
4. Check the box **Remember my signature for future signatures.**
5. Click **Set Signature.**



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**.

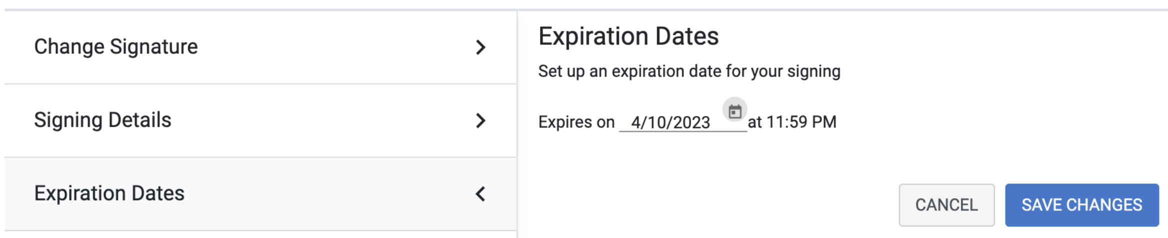


Set an Expiration Date for the Signing

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

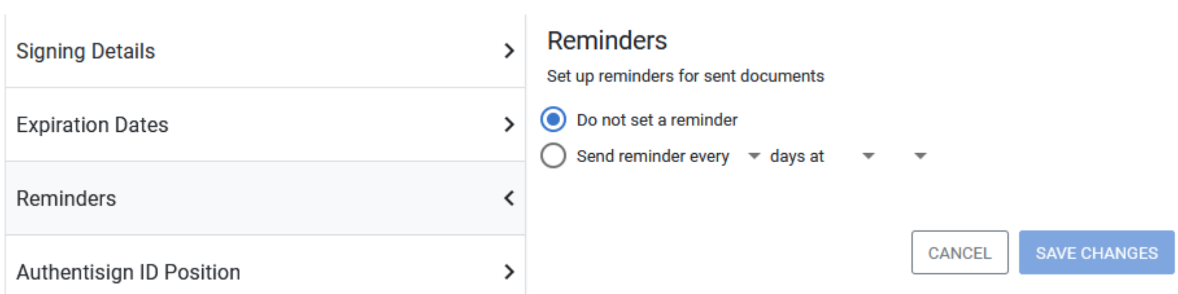
   Notes:

   - 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

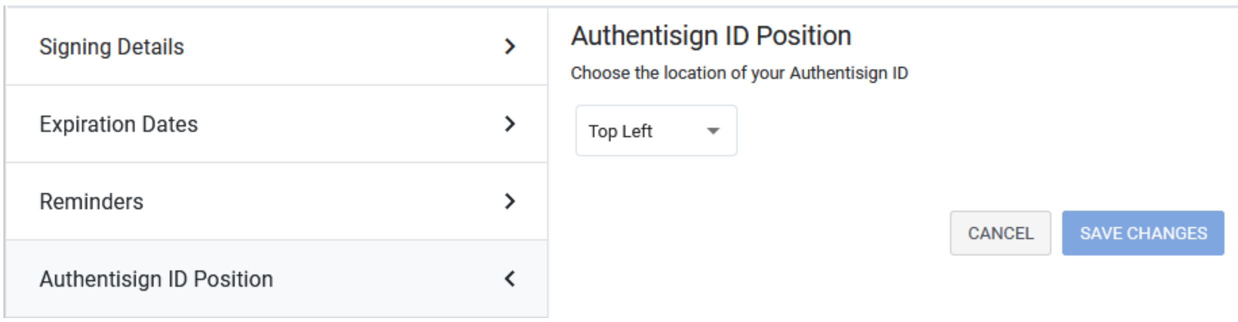
1. Click **Reminders**.
2. Select **Send reminder every**, and use the dropdowns to select how often and at what time of day the reminders are sent.
3. Click **SAVE CHANGES**.



Update the New Authentisign ID Position

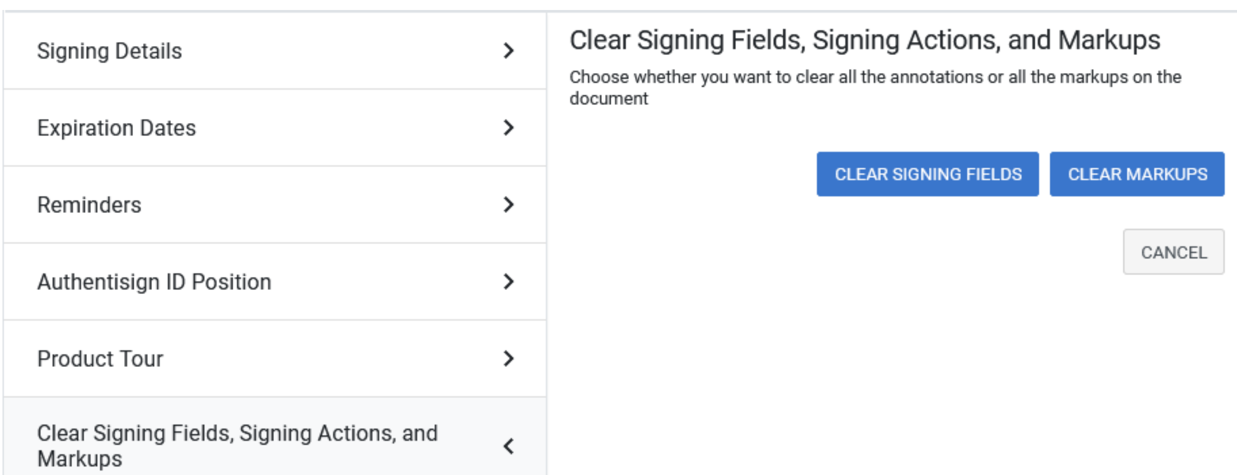
1. Click **Authentisign ID Position**.
2. Use the position dropdown  to select whether you need the New Authentisign ID number in the top left, top right, bottom left, or bottom right of each page of each document.

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



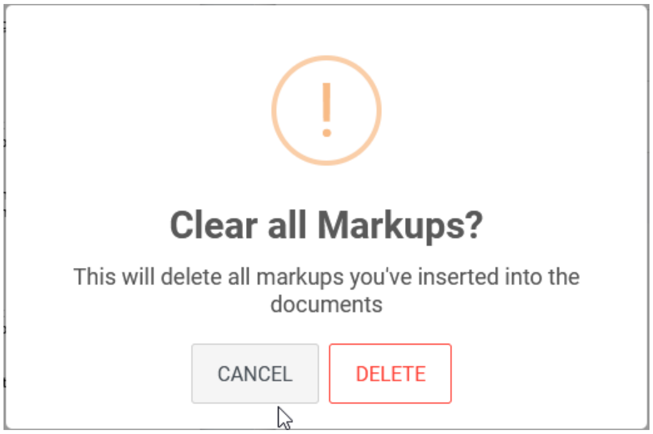
Clear Signing Fields and Markups

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: