

## The Complete Transaction Management Solution

Take your business paperless and manage all your listings, sales and leases online.

### **Instanet Forms**

Create and distribute online forms and contracts.

### **Includes DocBox**

Access and manage your documents from any computer or device with an internet connection. No need to carry your paper files everywhere you go!

### **Task Management**

A virtual checklist lets you manage all your transaction related tasks and to-dos.

### **Includes InstanetFax**

Includes unlimited inbound and outbound faxing, including InstanetFax, our paper fax to email technology.

### **Calendar and Appointment Management**

View appointments and events in a calendar format. Users have the ability to share calendars with other TransactionDesk users in the same office.

### **Customer Service Portal**

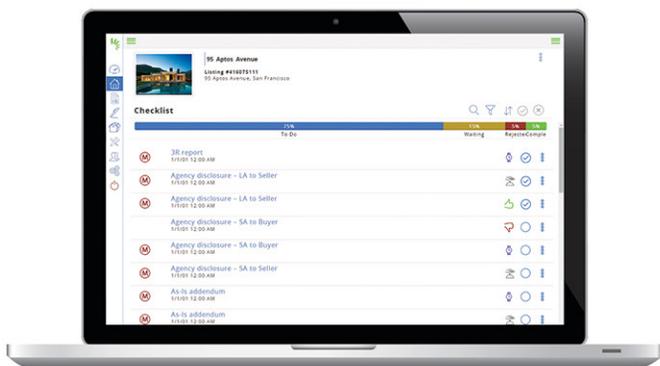
Give your clients 24/7 online access to their transaction documents and other information you wish to share. Improve your customer service while saving time.

### **Optional Authentisign E-Signature Tool**

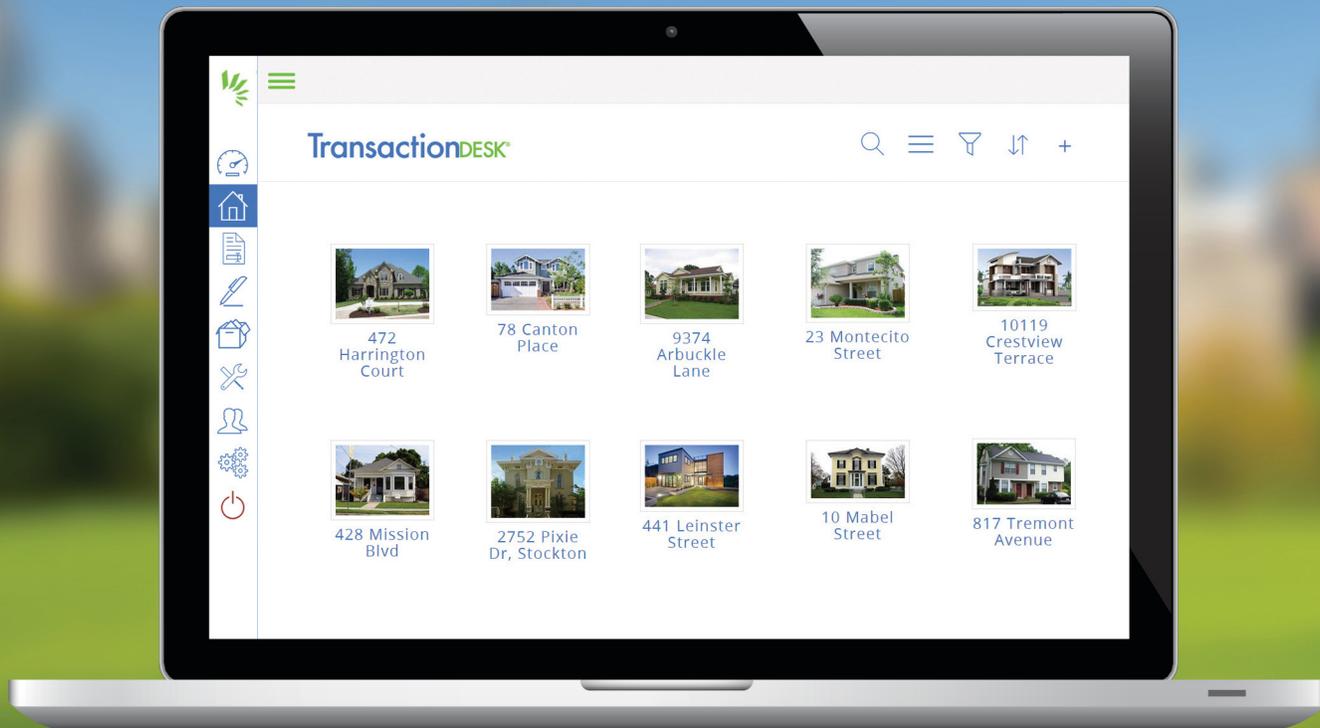
Documents and forms can be e-signed using the optional, fully integrated Authentisign module.

### **Broker Tools**

- Included with DocBox and TransactionDesk at no additional cost
- Instant file review for brokers and managers
- Reduce risk, save time, and save money
- Broker Dashboard
- Agent Document Checklists with messaging
- Compliance Review and Risk Mitigation Tools
- Office/enterprise wide oversight and management tools
- Comprehensive reporting



Now includes industry leading 24/7/365 LIVE TOLL FREE technical support



# TransactionDESK®

## The Complete Transaction Management Solution

### Reporting and file management

View and access all the listing, sale and lease files in your office.

### File review compliance management

Define what documents you require for each transaction type. Brokerage staff can quickly and easily review files online, from any computer with web access.

### Agent and Broker Dashboards

Now agents and brokers can create and maintain their

own custom dashboards. Users can drag and drop widgets to their dashboard enabling quick access and easy monitoring of their transactions

### Save money, go paperless

Save on printing consumables, storage, staff time, telecommunications cost, etc.

### Brokerage branding

All emails, faxes and the Customer Service Portal are branded



## Only TransactionDesk Gives You All These Features in One Easy Platform.

Feature	Description	Compare	Compare
Available Everywhere on Anything	Works on all commonly used devices and browsers - PCs, Macs tablets and smartphones. No apps required.		
Online forms and Contracts	Includes InstanetForms, a full featured online forms application		
Unlimited Document/ File Storage	Unlimited document storage for listing, sale and lease files - Save signed forms & third party documents in transaction files		
Complete Document Management Solution	Create an unlimited number of custom folders for storage of non-transaction related business documents and files.		
Load Documents Easily	Via email, upload, fax, virtual printer		
Complete PDF Management	Merge docs, split up docs, markup, convert other files to PDFs, etc.		
Email and Fax Documents from System	Creates record of all documents sent in transaction history. Unlimited toll free faxing in US and Canada		
Team Friendly	Share transactions and other folders/documents. Team can collaborate on transactions with appropriate permissions for each team member.		
Agent Dashboard	Enables Agents to view realtime activity regarding all of their transactions. Agents can select from a library of smart widgets to customize their dashboard to meet their needs.		
Tasks and Activity Plans	Manage all activities of your transactions and your business using the online checklists.		
Appointment and Calendar	Track all your appointments for your transactions and other business.		
Automated Reminder	Automated email reminders for both tasks and appointments ensures you won't miss a thing.		
Collaboration Tools	The branded Customer Service Portal allows agents to securely share documents and other information with clients 24/7/365.		
Service Ordering	Saves time by automatically collecting file information such as vendor contact info, property address, buyer/seller names, etc.		

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Feature	Description	Compare	Compare
Templates	Saves time and effort. Set-up the system once and let the system do the work for you. Templates for forms, documents, checklists and transactions.		
Branded	All communications and anything a client or third party can see is branded - emails, faxes, etc.		
Audit Trails and Logging	Tracks all activities and creates an audit trail in each transaction file automatically - "The Paperless Paper Trail"		
Authentisign Digital Signatures	Optional e-signature module is fully integrated making TransactionDesk the most complete paperless transaction platform in the industry.		
Long Term Data and Document Retention	All transactions, data and documents are kept for (at least) the legal retention period in your state at no extra charge.		
Data and Document Security/Safety	Everything is replicated to multiple datacenters. Digital certificates are applied to documents to detect tampering when out of system.		
<b>Brokerage Features</b>			
Broker Compliance and File Management	Document checklists, automated audit trail creation, online file management & collaboration. Easily perform file review online, from any computer. Reduce legal exposure, easily making sure all files are complete.		
Reporting	Easily find transactions and documents in your office or company, whether they are active/pending deals or ones that closed years prior.		
Custom System Configuration and Set-up	Flexible system works the way you work. Brokerage staff can define templates and branding that applies to all agents in the office and/or company.		
Brokerage Branding	Ensures your company's value is recognized by your agents and clients.		
Back Office Accounting System Integration	Reduce redundant data entry - import transaction data into popular brokerage back office systems.		
Broker Dashboard	Enables Brokers to view live realtime activity across their entire office. Broker can select from a library of Smart widgets to modify their dashboard to meet their needs.		

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