

**What is TransactionDesk?** Transaction Desk equals *Instanet Forms + DocBox + AuthentiSign!*

*Instanet Forms*, including *DocBox*, is an online form/contract/document storage solution. All GRAR forms can be filled out online, then printed, faxed or e-mailed right from this tool. *AuthentiSign* is a secure e-signature document signing service enabling parties to legally sign and review documents through the internet. Welcome to paperless!

**How much does this service cost me?**

This service is included with your UNYREIS MLS Participation Fee. REALTORS®, who are both MLS Participants and GRAR members, are entitled to receive this service as a member benefit.

Legally eSign Any  
Document Online


**Is training included and/or available?**

- **Video content** can be found in TransactionDesk. Click on the ? icon on the bottom left to find tons of quick, 1-5 minute 'How Do I' tutorials and Full Length, 30 - 60-minute overviews.
- **GRAR On-Site Training** is held regularly including some with CE hours! Go to your member portal see our upcoming schedule and register for an upcoming session.

**Is there Tech Support?**

- Call 1.800.606.3897, available 24/7 or email [support@instanetsolutions.com](mailto:support@instanetsolutions.com) from 9am - 5pm EST.

**How do I access or login to this account?**

- **Access via Matrix (note- you must visit this way the first time to get your account established)**
  - **Matrix Home Page:** Access your account with one click of your mouse via the **Matrix™ Home Page...** Find to the **External Links** section, and then click on **Instanet Transaction Desk**.
  - **Matrix from a Listing:** When ready to write an offer, link to TransactionDesk from the listing in Matrix and pull listing data right into the transaction, click on the Instanet icon in the listing. 
- **Access via TransactionDesk Button on the GRAR Member portal (Must first log in via Matrix, see above)**
- **Access Directly via Your Browser (Must first log in via Matrix, see above)**  
Access Instanet directly on your Apple, Windows and Android-based smartphone or tablet devices. Simply log into your existing TransactionDesk account through your tablet browser and you will be automatically accessing this version. Go to: <https://www.transactiondesk.com/GRAR>. Note- you must first log in and create a password before using this link if you haven't. Go to TransactionDesk from your PC, click on **Settings** (on the left) and then **Preferences** and then **Login** to set your password across devices.
- **Access via IOS Device with the TransactionDesk App**  
Visit the App Store and search for the TransactionDesk app. To login to the app the first time, you will need an activation code which can be generated in your account in TransactionDesk.
  - To get started, **login to your TransactionDesk account** as you normally would **on your PC** or mobile browser. Navigate to **Setup** on the left-hand side (you can click the green hamburger button in the top left-hand corner to expand the menu if needed). Next click "**Linked Devices**".
  - Once in this section, go ahead and **hit the "Activation Code"** button in the top right-hand corner.
  - You will see a pop-up window presented to you with an alphanumeric code and you have 15 minutes to enter this into your app login page for security purposes. **Copy the code down or keep the screen up on your PC.**
  - Next go ahead and open the APP on your phone or tablet and on the login page enter the code that you copied down from the step above in the "Activation Code" field box. (The login page also has similar instructions on how to obtain your Activation code.)
  - Now hit **Sign-In** and it will log you into your account and start you in the Agent Dashboard screen.
  - **Hint- never log out of the app or you will need to go back for another activation code.**

## What tools are available to use in TransactionDesk?

### 1. **Instanet Forms with Transaction Desk and Dropbox**

TransactionDESK®

Now, starting a transaction couldn't be easier. The extensive forms library allows you to select and customize the forms you need from practically any device or computer. The Transaction Templates feature makes your own forms packets, and includes a large database of commonly-used clauses and stipulations. Easily add personal or brokerage-specific clauses. There's personal branding options with your name, logo, contact information on all your forms.

### 2. **AuthentiSign** Brings Convenience to Document Signing!

AuthentiSIGN®

You don't have to scramble all over town and coordinate multiple schedules to simply get legal signatures on your real estate documents. It's easy, legal, and the new way of doing business. You can easily add reviewers in addition to the signers so agents and attorneys can review documents before they are presented to clients for signature.

The Authentisign system automatically routes documents, then gathers signatures and distributes fully-executed documents once all parties have signed. Your emails include your personal branding when you set up your Authentisign account.

### 3. **AuthentiSign and DocBox Printers** allow you to *fax, email and/or upload files into Authentisign and or DocBox (where you store your transactions) by virtually 'printing' them from any application on your PC.* Once installed on your PC, simply click on File, Print and select the AuthentiSign Printer or DocBox Printer. A one-time setup is required for each.

DocBOX®

- To set up these **Printers** on a PC:
  - **Login to your TransactionDesk account.**
  - Go to **Settings>Program Settings>AuthentiSign Print Driver Setup** and then **download the driver** and read/follow the instructions available.
  - When done, go to **Settings>Program Settings>DocBox Print Driver Setup** and then **download the driver** and read/follow the instructions available.

### 4. **Fax-it!! Email to fax service** allows the Instanet user to **email a document** to a **fax number**. **Note - You must send the email from the email address you have in your TransactionDesk account or you will get an error message.**

For example: Agent Fred wants to email a document to customer Wilma's fax machine. To check his TD email address, he clicks on the **SETTINGS** tab in Transaction Desk, then **PREFERENCES** and then clicks on **USER INFORMATION**. Now that Fred knows which email is assigned to his account, Fred creates an email to send his client's fax (**the following is an extremely important part**):

- In the "**To:**" section, Fred enters in the following email: **email2fax@transactiondesk.com**.
- In the "**Subject:**" section, Fred types Wilma's **fax number: (ex. ###-###-####)**.
- Next Fred attaches the document(s) he wants to send to Wilma and sends the email.
- Once sent, he will receive 2 emails shortly after.
  - The first email will let Fred know that his email was and is put in queue.
  - The second email will let Fred know that the fax was either a success or fail. Please be patient with the response time because the size of the fax will determine the wait time.