

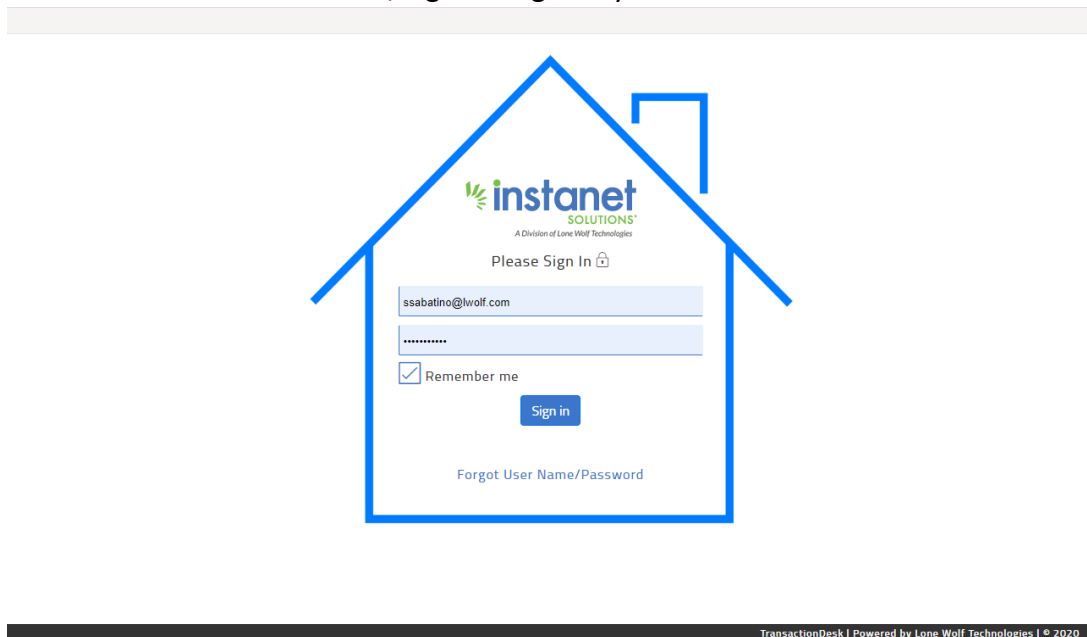
# Updater & TransactionDesk Integration User Guide

## Summary

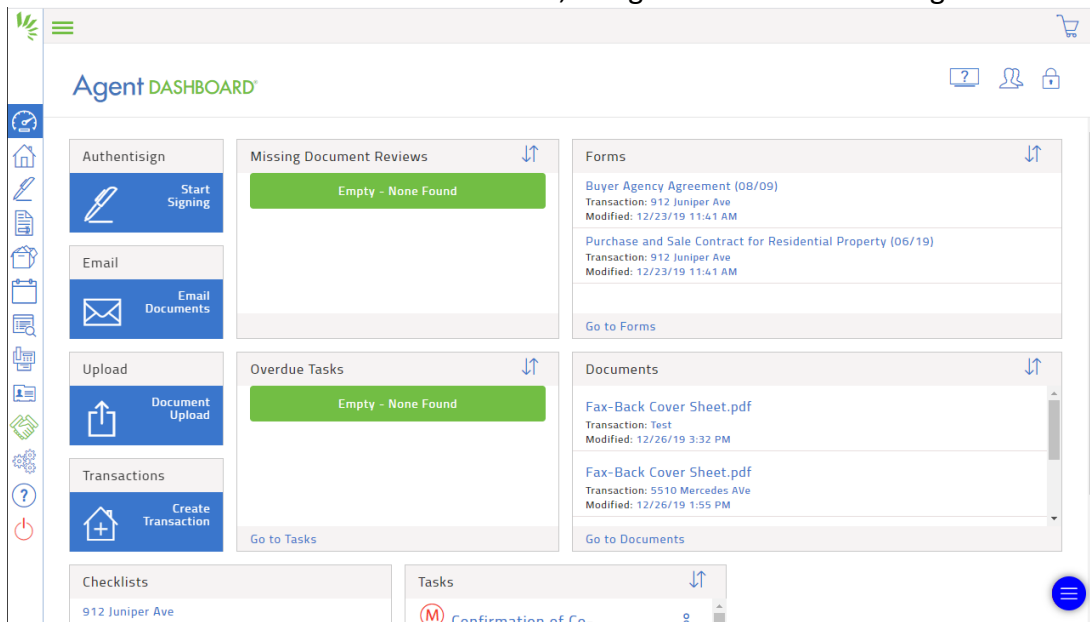
This user guide describes how to set up the Updater integration for a single agent; including how to send Updater invitations to clients and add agent branding to your invitations.

## Steps for Agent Opt-in

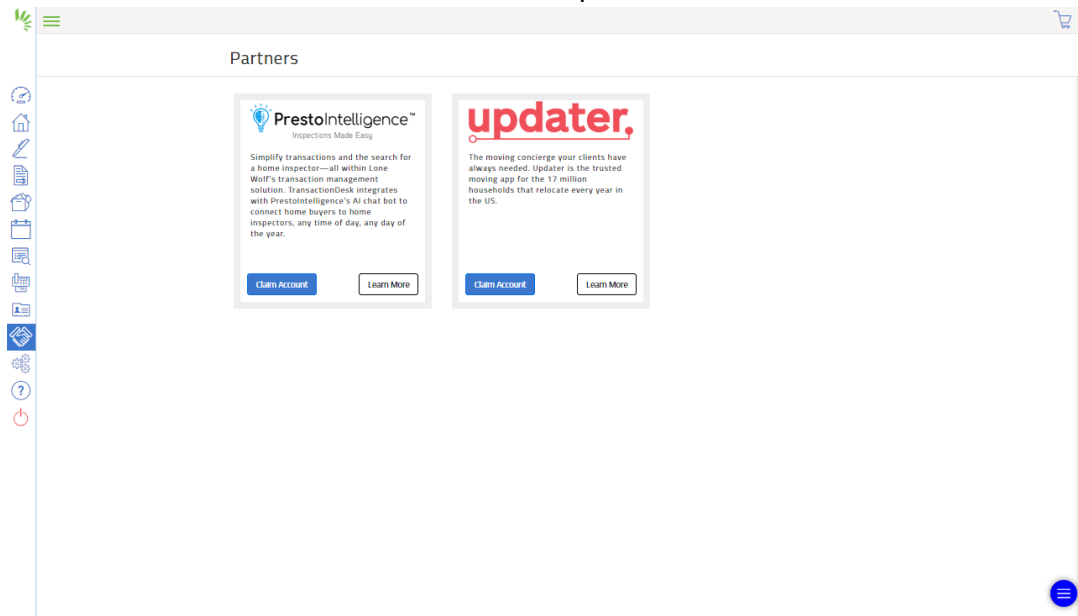
1. Go to [transactiondesk.com/login](https://transactiondesk.com/login) to log into your account.



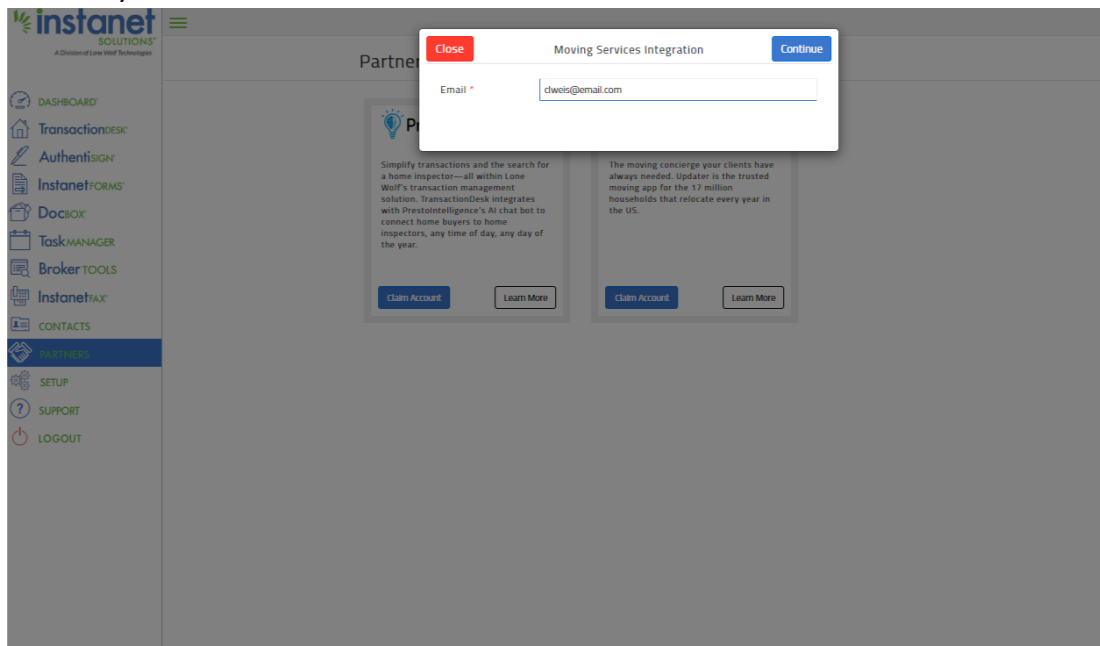
2. From the dashboard of TransactionDesk, navigate to the **Partners Page**.



3. Click the **'Claim Account'** button on the Updater tile.




4. Enter your email address and click **'Continue'**.



5. Type in a password and click **'Get Started'** to claim your free account!

**updater.**

Claim your premium account now!



So, great news, it's free  
for you *and* your clients!


Minimum of 6 characters, with at least 1 letter and 1 number

**GET STARTED**

By clicking the button above, I agree to the  
Updater Service Agreement

6. Set up your branding so your clients know the Updater invitation is coming from their agent!


**updater.**



Let's set the branding your clients will see.

ZipLogix got us started, please fill in the rest.

Add your headshot



Only .jpg or .png images. Max 5MB.

FIRST NAME

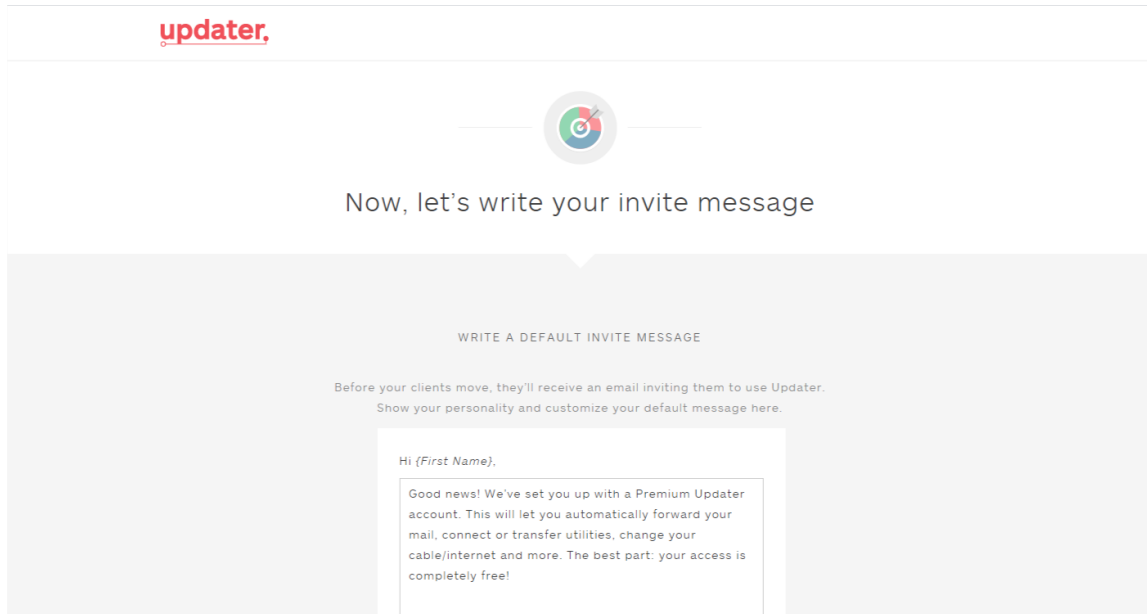
LAST NAME

ADDITIONAL INFO ⓘ  
MAX 35 CHARACTERS

WEBSITE URL

TWITTER ⓘ

7. Once you've set your branding you can customize the invite message that will be sent to your clients.



**updater.**

Now, let's write your invite message

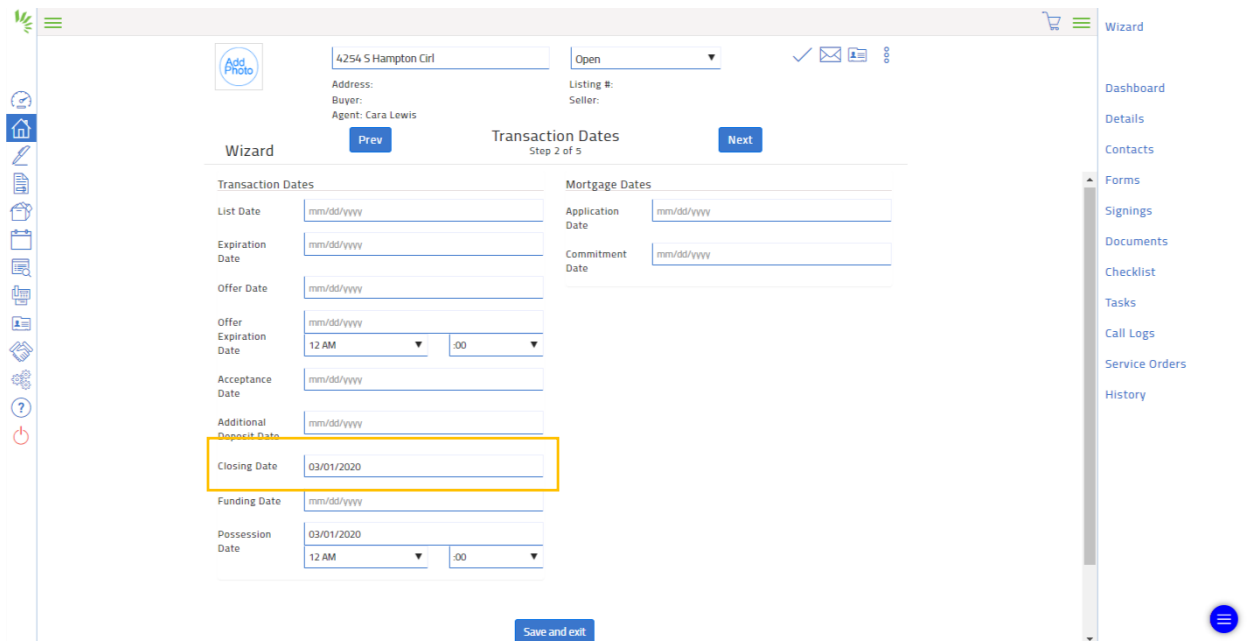
WRITE A DEFAULT INVITE MESSAGE

Before your clients move, they'll receive an email inviting them to use Updater.  
Show your personality and customize your default message here.

Hi (First Name),

Good news! We've set you up with a Premium Updater account. This will let you automatically forward your mail, connect or transfer utilities, change your cable/internet and more. The best part: your access is completely free!

8. An Updater invitation will be sent to your client a few weeks before the closing date entered in TransactionDesk.



4254 S Hampton Cir | Open | Listing #: | Buyer: | Seller: | Agent: Cara Lewis

Wizard | Transaction Dates (Step 2 of 5) | Next

**Transaction Dates**

List Date: mm/dd/yyyy

Expiration Date: mm/dd/yyyy

Offer Date: mm/dd/yyyy

Offer Expiration Date: mm/dd/yyyy | 12 AM | :00

Acceptance Date: mm/dd/yyyy

Additional Deposit Date: mm/dd/yyyy

**Closing Date:** 03/01/2020

Funding Date: mm/dd/yyyy

Possession Date: 03/01/2020 | 12 AM | :00

**Mortgage Dates**

Application Date: mm/dd/yyyy

Commitment Date: mm/dd/yyyy

Save and exit

Wizard | Dashboard | Details | Contacts | Forms | Signings | Documents | Checklist | Tasks | Call Logs | Service Orders | History