

Transaction Desk is a secure online forms platform and document storage system. The customizable Dashboard provides icons, action buttons and display panels to quickly create a transaction, access your previously created transactions, send an electronic signing, and more!

The Dashboard

The screenshot displays the Agent DASHBOARD interface. At the top, the title "Agent DASHBOARD" is visible. Below the title is a navigation bar with icons for "Create", "Upload", "Email Docs", "Fax Docs", "Transactions", "Checklists", "Recent", "Forms", and "Rejected". A sidebar on the left contains icons for "Home", "Calendar", "Documents", "Email", "Tasks", "Authentisign", and "Settings". The main content area is divided into several widgets: "Transactions" (listing "123 Main Street", "Marino Listing", and "Liberty Lake Purchase and Sale"), "Forms" (listing "Form 17 - Seller Disclosure - Improved Property", "Form 22A - Financing Addendum", and "Form 35 - Inspection Addendum"), "Tasks" (listing "Walk Through" and "Buyer Insurance Remindeer"), and "Authentisign" (listing "Nelson Purchase and Sale"). Numbered callouts (1-7) point to specific elements: 1 points to the "Forms" widget, 2 to "Document Upload", 3 to the "Create transaction" button, 4 to "Start Signing", 5 to the "Settings" gear icon, 6 to the "Fax Docs" button, and 7 to the "Checklists" button.

Tip: Click the "unlock" icon and then click the dot menu to show your widgets and customize your dashboard.

- 1 Forms**

Print or fill-in and save a form to use individually or add to a transaction. A search is available to quickly find a form or narrow to view a group of forms.
- 2 Documents**

Transaction Desk includes unlimited document storage. Upload any PDF, Word, Excel documents or image files. Create folders to organize your documents.
- 3 Transaction Wizard**

Create, store, and send online transactions using the transaction wizard. You can begin a new transaction by clicking the Transaction Desk icon on any listing in Paragon, or by clicking the "Create Transaction" button in Transaction Desk. The wizard will walk you through the steps of selecting, auto-filling and completing forms, adding contacts, uploading additional documents, and sending for paperless signing using Authentisign.
- 4 Authentisign Electronic Signature Service**

Electronically send transaction documents to clients and other parties for paperless signing. This feature is also available in the transaction wizard.
- 5 Contacts**

Save clients that you commonly work with as contacts to quickly retrieve their information to add to future transactions or electronic signings.
- 6 InstanetFax**

Create a cover sheet that allows you to fax paper documents to any email address. You can also create a fax back cover sheet that allows your clients to fax paper documents directly into the appropriate transaction file in Transaction Desk.
- 7 Broker Tools**

Managing brokers can add custom branding and create transaction checklists and approval processes for their offices..