

***TransactionPoint®***  
***Transaction***  
***Coordinator's***  
***Guide***



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The company examples and the agent examples who work for such companies are not intended to depict any particular company and were created for illustration purposes only. To provide comprehensive coverage of the features available in the system, all available features are enabled and selected agents have full authority to access all of the features. This in no way implies that any particular agent at any particular Real Estate company would have access to all features covered within this guide. Contact your system administrator to verify which features are enabled for your company and which features you are authorized to access. If you are unable to access a particular feature documented here, that in no way implies that the software is functioning incorrectly.

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# Overview

TransactionPoint is a Web-based, automated transaction management solution for Real Estate companies and Real Estate professionals. TransactionPoint provides real estate companies with a new level of service to their clients, while achieving a quantum leap in transaction productivity and monitoring ability.

## Who is a Transaction Coordinator?

Within TransactionPoint, the transaction coordinator can:

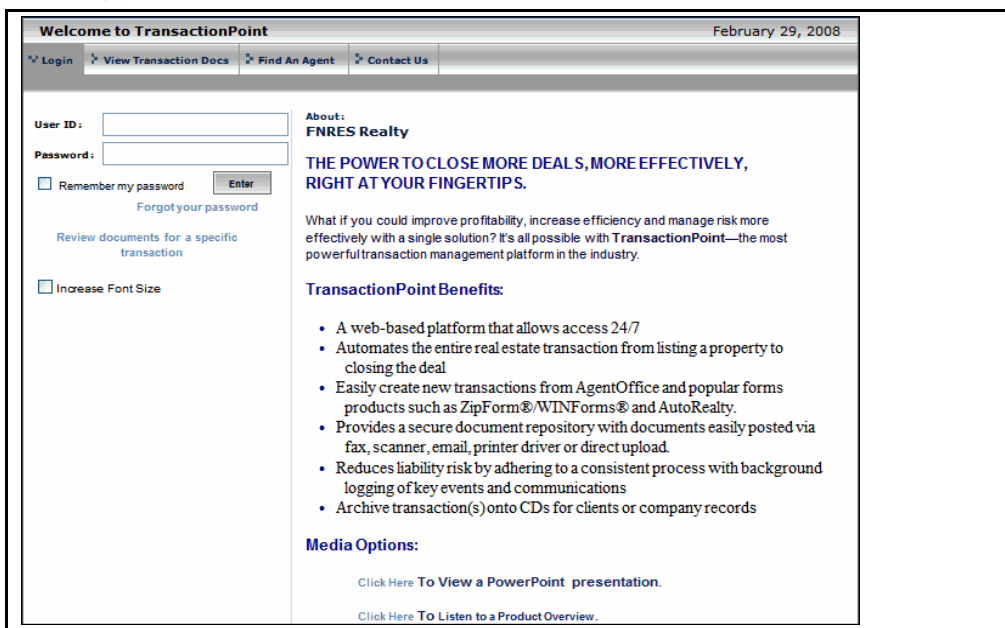
- Add properties for agents
- Associate clients with properties
- Create new transactions for properties
- Update transactions
- Place and review orders for transactions
- Upload documents for a property

## System Requirements

- Microsoft® Windows 2000® or higher
- Microsoft® Internet Explorer® 5.5 or higher

## Logging In

1. Using your Web browser, access the TransactionPoint Web site.



The screenshot shows the TransactionPoint web application interface. At the top, a banner reads "Welcome to TransactionPoint" with the date "February 29, 2008" on the right. Below the banner is a navigation bar with links: "Login", "View Transaction Docs", "Find An Agent", and "Contact Us". The main content area is divided into two columns. The left column contains a login form with fields for "User ID:" and "Password:", an "Enter" button, a "Remember my password" checkbox, a "Forgot your password" link, a link to "Review documents for a specific transaction", and an "Increase Font Size" checkbox. The right column contains an "About: FNRES Realty" section with the tagline "THE POWER TO CLOSE MORE DEALS, MORE EFFECTIVELY, RIGHT AT YOUR FINGERTIPS." Below this is a paragraph describing the platform's benefits, followed by a "TransactionPoint Benefits:" section with a bulleted list of features. At the bottom of the right column are "Media Options:" with links to "Click Here To View a PowerPoint presentation." and "Click Here To Listen to a Product Overview."

2. Type your **User ID**.
3. Type your **Password**.
4. If you want your system to remember your password, select **Remember my password**. If you intend to change your initial password that was sent to you in the email message, do not select the check box at this time.
5. If you would like to increase the font size for all TransactionPoint Web pages, check **Increase font size**.
6. Click **Enter**. The **Transaction Center** page appears.

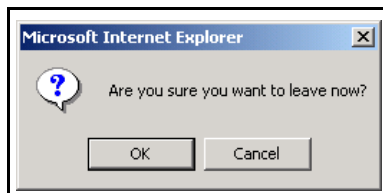
The screenshot shows the Transaction Center web application. At the top is a navigation bar with links: Home | Mail | Calendar | FAQ | Help | Logout. Below this is a menu bar with tabs: Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, and Profile & Preferences. The main content area is titled "Transaction Center" and contains several sections:

- Submit a New Transaction:** A button labeled "Create Transaction".
- (or) Find Existing Transaction: (choose 1 or all fields to search)** A section with search filters:
  - Transaction Coordinator: Jones, Karen (with a "Save Settings" button)
  - Branch: East Office (dropdown menu)
  - Agent: (\* InActive Agents) Show All (dropdown menu)
  - Agent Represents: Show All (dropdown menu)
  - Status: Pending (dropdown menu)
  - With: Show All (dropdown menu)
  - Other Filters: Property Address (dropdown menu) and a text input field.
  - A "Search" button.
- Transaction Search Results:** A table showing search results. Above the table are buttons: "Print Due/Past Due Activities", "Transfer", and "Fax Cover" (with a checkbox). The table has columns: Trans #, Property Address, Status, Primary Agent, Closing / Escrow #, Principals (B or S), and Est. Closing. There are four rows of results, each with a "Remove" link under the Trans # column.

Trans #	Property Address	Status	Primary Agent	Closing / Escrow #	Principals (B or S)	Est. Closing
<a href="#">3138-3370</a>	24129 Sylvan Glen Rd F Diamond Bar, CA 91765	Pending	Baxter, Bill		(S) Smith, John	<input type="checkbox"/>
<a href="#">3154-3388</a>	23617 Golden Springs Dr K-1 Diamond Bar, CA 91765	Pending	Baxter, Bill			<input type="checkbox"/>
<a href="#">3292-3524</a>	23617 Golden Springs Dr K-1 Diamond Bar, CA 91765	Pending	Baxter, Bill		(S) smioth, josmith	<input type="checkbox"/>
<a href="#">3293-3525</a>	22840 Hilton Head Dr 130 Diamond Bar, CA 91765	Pending	Baxter, Bill		(S) Cardenas, Jose	<input type="checkbox"/>

## Logging Out

1. Click **Logout** in the top navigation area. A logout confirmation page appears.

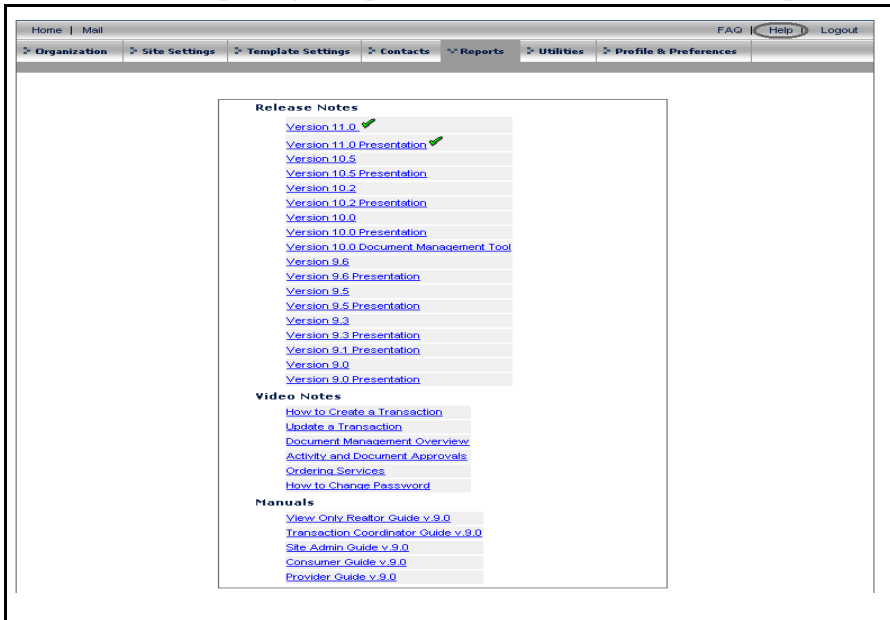


2. Click **OK**.

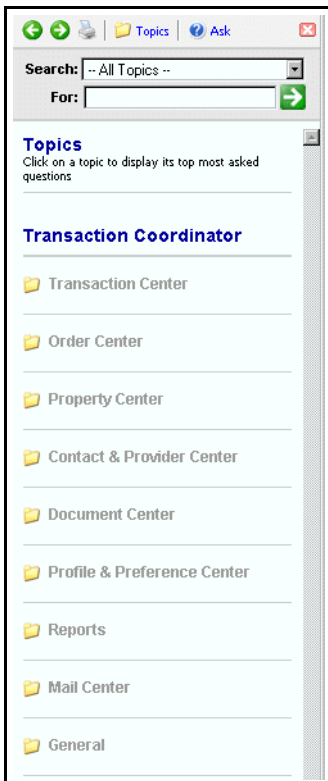


# Getting Help

Click **Help** in the top navigation panel to view the available online help.



Click **FAQ** to obtain answers to frequently asked questions.



# Transaction Center

You can search, create, modify, and remove transactions in the **Transaction Center**. You can also assist another transaction coordinator, print due or past due activities, and print Fax covers pages for your transaction.

1. Click the **Transactions** tab.
2. Click **Transaction Center**. The **Transaction Center** page appears. You may also click **HOME** for the same results.

The screenshot shows the Transaction Center interface. At the top is a navigation bar with tabs: Home, Mail, Transactions (selected), Orders, Properties, Contacts & Providers, Documents, Reports, and Profile & Preferences. Below the navigation bar is the Transaction Center header. A 'Submit a New Transaction' section contains a 'Create Transaction' button. Below this is a 'Print Page' button. A search section includes dropdowns for 'Show: My Transactions', 'Agent Represents: Show All', 'Status: Pending', and 'With: Show All'. There is also an 'Other Filters' section with a 'Property Address' dropdown and a 'Search' button. The main section is titled 'Transaction Search Results' and displays a table of transactions. The table has columns: Trans #, Property Address, Status, Primary Agent, Closing/Escrow #, Principals (B or S), and Estimated Closing Date. Two transactions are listed: 6229-6432 and 6225-6428. Below the table, there is a note: '\* You have been given access to this transaction by the owner'. At the bottom right, there is a 'Total Transactions: 2' label.

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date
<a href="#">6229-6432</a>	175 South California Ave. Monrovia, CA 91016	Pending	Atkins, William	GL-07-6748	(B) May, George	11/18/2007
<a href="#">6225-6428</a>	2451 Montrose Ave. Montrose, CA 91020	Pending	Atkins, William	07-055-2451	(S) Durst, Amy	12/15/2007

# Searching Transactions

1. Select the search criteria for the transaction.
2. Click **Search**. The page refreshes to display a list of properties that match the search criteria.

[Home](#) | [Mail](#) [Calendar](#) | [FAQ](#) | [Help](#) | [Logout](#)

[Transactions](#) | [Orders](#) | [Properties](#) | [Contacts & Providers](#) | [Documents](#) | [Reports](#) | [Profile & Preferences](#)

**Transaction Center**

Submit a New Transaction:

(or) Find Existing Transaction: (choose 1 or all fields to search)

Transaction Coordinator: Jones, Karen

Branch:  Agent: (\* InActive Agents)

Agent Represents:  Status:  With:

Other Filters:

Transaction Search Results

Total Transactions : 3

☐

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Est. Closing
<a href="#">3696-3924</a>	23617 Golden Springs Dr K-17 Diamond Bar, CA 91765	Pending	Moore, Mary		(S) Cardenas, Jose	<input type="checkbox"/>
<a href="#">3779-4005</a>	123 Hoa Street Honolulu, HI <a href="#">Remove</a>	Pending	Moore, Mary		(S) Ier, Sel	<input type="checkbox"/>
<a href="#">3649-3877</a>	111 Fake St Diamond Bar, CA 91765	Pending	Moore, Mary		(S) Buyer, Test	07/02/2005 <input type="checkbox"/>

☐

Total Transactions : 3

# Creating a New Transaction

1. Click **Create Transaction**. The **Transaction Summary** page appears.

Home | Mail | FAQ | Help | Logout

Transactions | Orders | Properties | Contacts & Providers | Documents | Reports | Profile & Preferences

Property Address: Transaction ID: Escrow/Closing No.  
 Listing Price: \$ Represents/Status: Escrow/Closing:  
 Sales Price: \$ Contract Acceptance Date: Estimated Closing Date:  
 Year Built/Approximate Age: Seller(s): Buyer(s):  
 MLS No. Seller's Agent: Buyer's Agent:  
 APN No. File No.

Transaction Summary | Transaction Contacts | Activities/Orders/Docs | Communication Log

Transaction Details

\*Agent: ABC Realty - Glendale Branch - Select Agent -  
☐ Private Contact  
 (Note: Agent represents SELLER for Dual Agency Transaction)

\*Agent Represents: - Select - Status: Pending \*Sales Type: - Select -  
 (mm/dd/yyyy) (mm/dd/yyyy)

Listing Date: Listing Expiration Date:  
 (mm/dd/yyyy) (mm/dd/yyyy)

Contract Acceptance Date: Days to Estimated Closing Date:  
 (mm/dd/yyyy)

Estimated Closing Date: Escrow Closing Date:  
 (mm/dd/yyyy)

Listing Price: Sale Price:  
 (mm/dd/yyyy)

Loan Type: Select Loan Type Loan Amount: File Number:  
 (mm/dd/yyyy)

Escrow/Closing No.: Title No.: Cancellation Date:  
 (mm/dd/yyyy)

Property Details

\*Type: - Select Property Type - Yr. Built: Age:  
 \*Address 1: MLS Board: Unknown Board  
 Address 2: MLS #:   
 \*City: \*State:   
 Zip: - (Additional 4 digits optional) APN:   
 Property Search APN Search

+ Additional Property Details

+ Home Owners Association

Save Save/Next

User: Janet Moore v12.2 Copyright© 2002 Site Name: gfk.com  
 TransactionPoint Terms of Use Privacy Policy Powered by Fidelity National Real Estate Solutions

2. Set access options for Transaction Coordinators and Full Access Agent. (Not available to all users)

- Transaction Coordinators can give Full Access Agents full access to a transaction.
  - i. In the **Select Agent** list select the primary agent for the transaction.

- ii. Select the **Allow Full Access** check box if this agent is permitted to full access rights to the transaction.

Transaction Summary | Transaction Contacts | Activities/Orders/Docs | Communication Log

Transaction Details [Save] [Save/Next]

\*Agent: ABC Realty - Glendale Branch | Anderson, Karen

☐ Private Contact ☒ Allow Full Access

The transaction will appear in the Full Access Agent's list with an asterisk, indicating full access.

Transaction Search Results							Total Transactions: 2
<input type="button" value="Print Due/Past Due Activities"/> <input type="button" value="Transfer"/> <input type="button" value="Fax Cover"/> <input type="checkbox"/>							
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
6225-6428*	2451 Montrose Ave. Montrose, CA 91020	Pending	Atkins, William	07-055-2451	(S) Durst, Amy	12/15/1907	<input type="checkbox"/>
6238-6441*	3871 Avenue 47 Los Angeles, CA 90041	Pending	Anderson, Karen	ABC-LA-3871-007	(S) Robertson, Edward	11/22/2007	<input type="checkbox"/>
* You have been given access to this transaction by the owner							
<input type="button" value="Print Due/Past Due Activities"/> <input type="button" value="Transfer"/> <input type="button" value="Fax Cover"/> <input type="checkbox"/>							Total Transactions: 2

- Full Access Agents can assign Transaction Coordinators to a transaction.
  - i. Select the **Allow TC Access** check box.
  - ii. In the **TC** list, select the Transaction Coordinator to receive full access to the transaction.

Transaction Details [Save] [Save/Next]

\*Agent Represents: - Select - | Status: Pending | \*Sales Type: - Select -

☒ Allow TC Access | TC: Moore, Janet (ABC Realty - Glendale B)

**Note:** Only Transaction Coordinators with access to the same branch as the Full Access Agent appear in this list.

The transaction will now appear in the Transaction Coordinator's list with an asterisk, indicating full access to the transaction.

Transaction Search Results							Total Transactions: 3
<input type="button" value="Print Due/Past Due Activities"/> <input type="button" value="Transfer"/> <input type="button" value="Fax Cover"/> <input type="checkbox"/>							
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
6225-6428	2451 Montrose Ave. Montrose, CA 91020	Pending	Atkins, William	07-055-2451	(S) Durst, Amy	12/15/1907	<input type="checkbox"/>
6241-6444*	9810 Brand Blvd.#235 Glendale, CA 91203	Pending	Anderson, Karen		(S) Morrow, Kevin	11/08/2007	<input type="checkbox"/>
6238-6441	3871 Avenue 47 Los Angeles, CA 90041	Pending	Anderson, Karen	ABC-LA-3871-007	(S) Robertson, Edward	11/22/2007	<input type="checkbox"/>
* You have been given access to this transaction by the owner							
<input type="button" value="Print Due/Past Due Activities"/> <input type="button" value="Transfer"/> <input type="button" value="Fax Cover"/> <input type="checkbox"/>							Total Transactions: 3

3. Complete the requested information. Required fields are marked with red asterisks (\*).
  - A selection from the **Sales Type** list is required. Choose from the following selections: Refinance, Resale, New Construction, Other, and Unspecified.

---

**Note:** Transactions you entered into TransactionPoint before the **Sales Type** list was added will automatically be given a default selection of **Other**. You can change this selection if you want.

---

- Use the **Property Search** button to search for properties in TransactionPoint or within your contracted MLS provider.
4. Click the plus sign next to **Additional Property Details** to enter additional details, property specifications or property occupancy information.

---

**Note:** Additional Property Detail and Home Owners Association information is not required to proceed with this transaction.

---

5. Click the plus sign next to **Home Owners Association** to enter Home Owners Association information.
6. Click **Save** to save the information, or **Save/Next** to move to the next page in the transaction creation process.

## Adding Transaction Contacts

1. The **Transaction Contacts** page appears.

**Transaction Contacts** [Save] [Save/Next >]

**Transaction Coordinator:** Downs, Emily

**Buyer's Agent:** Brown, Robert

**Buyer** [Find Contact]

Contact Type: \* First Name: \* Middle: Last Name: \* Company Name: [Private Contact]

**Mail Address** [Use address on transaction]

Address 1: Address 2: City: State: ZIP: Country: USA

**Email**

Home: Work: Fax: Mobile: Delivery Preference: None

**Seller** [Find Contact]

Contact Type: First Name: \* Middle: Last Name: \* Company Name: [Private Contact]

**Mail Address** [Use address on transaction] [Use above address]

Address 1: Address 2: City: State: ZIP: Country: USA

**Email**

Home: Work: Fax: Mobile: Delivery Preference: None

2. Complete the requested information. Only the names are required. Click **Find Contact** to search existing contacts if the seller has been involved in a prior transaction.
3. Click **Save/Next**. The **Activities/Orders/Docs** page appears.

## Adding Transaction Key Dates and Activities

Key dates are different for every contract. All due dates for transaction activities are based on the key dates.

Key Dates		
Description	# of Days from Acceptance Date	Key Date (MM/DD/YYYY)
Listing Date		<input type="text"/>
Listing Expiration Date		<input type="text"/>
Contract Acceptance Date		<input type="text"/>
Increase of Deposit	10 <input type="checkbox"/>	<input type="text"/>
Property Condition Contingency	17 <input type="checkbox"/>	<input type="text"/>
Financing Contingency Removal	17 <input type="checkbox"/>	<input type="text"/>
Title Contingency	17 <input type="checkbox"/>	<input type="text"/>
HOA Documents Contingency	17 <input type="checkbox"/>	<input type="text"/>
Appraisal Contingency Removal	17 <input type="checkbox"/>	<input type="text"/>
Contingent Sale (buyer's home) Contingency	17 <input type="checkbox"/>	<input type="text"/>
Court Approval Contingency	17 <input type="checkbox"/>	<input type="text"/>
Visual Inspection Contingency	17 <input type="checkbox"/>	<input type="text"/>
Estimated Closing Date	17 <input type="checkbox"/>	<input type="text"/>

Activity Selection	
Please select one of the activity templates below to generate activity list:	
<input checked="" type="radio"/> Master Activity List	
<b>Activity Templates:</b>	
<input type="radio"/> Commercial-Seller	
<input type="radio"/> Inspection Activities	
<input type="radio"/> Test1 Seller Activity Template	

**Note:** The System Administrator can set up default key dates and descriptions. You can modify the default dates, if needed.

4. Either enter the **# of Days from Acceptance Date** or the **Key Date** for each date.
5. Select the **Template** you wish to apply to this transaction.
6. Click **Generate Activities**.

The **Activities** page appears, showing the complete list of activities required to process this transaction.

The screenshot displays the 'Activities' section of the TransactionPoint interface. At the top, there are tabs for 'Transaction Summary', 'Transaction Contacts', 'Activities/Orders/Docs' (which is active), and 'Communications Log'. Below the tabs, there are sections for 'Key Dates' and 'Activities'. The 'Activities' section includes a 'Filter by Task Type' dropdown set to 'Show All' and a 'Filter by Task Status' dropdown also set to 'Show All'. There are buttons for 'Add Template Activities' and 'Add Master Activities'. Below these are buttons for 'Update', 'Remove', 'Fax Cover', and 'Insert'. The main table lists activities with columns for 'Priority', 'Activity', 'Due', 'Completed', 'Log', 'Orders', and 'Docs'. The activities listed are: General Documents and Orders, Buyer's Inspection Advisory (due 5/25/2006), Counter Offer(s) (due 5/25/2006), Intro letter (due 5/25/2006), Lender info (pre-qual/app letter) (due 5/25/2006), Open escrow (due 5/25/2006), RPA (due 5/25/2006), Mold Disclosure (due 5/29/2006), Home Warranty Confirmation (due 5/31/2006), Escrow Documents (due 6/7/2006), and Hazard Report Receipt Received (due 6/7/2006). A red note at the bottom states 'Due/Past due activities are shown in red.' Below the activities section are sections for 'Orders', 'Transaction Documents', and 'Inbox Documents'.

Priority	Activity	Due	Completed	Log	Orders	Docs
	General Documents and Orders					
	Buyer's Inspection Advisory	5/25/2006				
	Counter Offer(s)	5/25/2006				
	Intro letter	5/25/2006				
	Lender info (pre-qual/app letter)	5/25/2006				
	Open escrow	5/25/2006				
	RPA	5/25/2006				
	Mold Disclosure	5/29/2006				
	Home Warranty Confirmation	5/31/2006				
	Escrow Documents	6/7/2006				
	Hazard Report Receipt Received	6/7/2006				

## Working with Transaction Activities

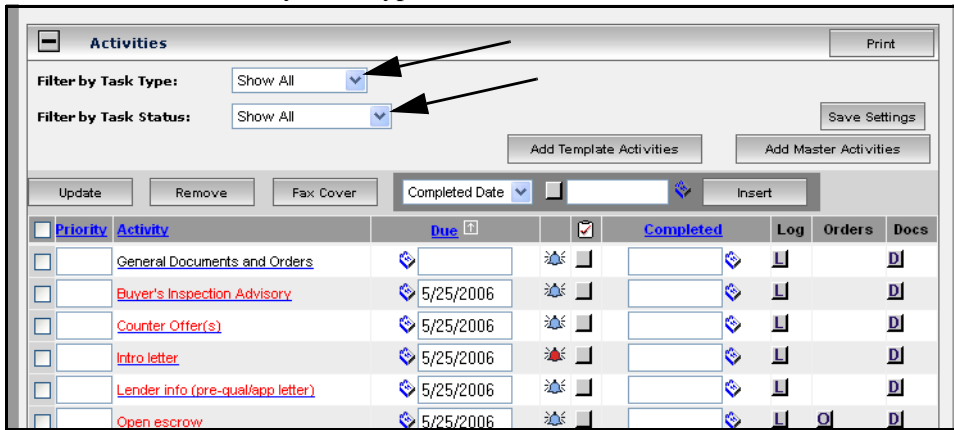
The **Transaction Activities** page allows you to:

- Filter activities
- Add or remove activities
- Enter and update due and completed dates
- Set alerts
- View and enter activity logs
- Generate and print Fax cover sheets
- Upload and work with activity documents
- Place activity orders
- Print due or past due activities



## Filtering Activities

You can filter activities by Task Type and Task Status:



The screenshot shows the 'Activities' window with a 'Filter by Task Type' dropdown set to 'Show All' and a 'Filter by Task Status' dropdown also set to 'Show All'. Arrows point to these dropdowns. Below the filters are buttons for 'Update', 'Remove', 'Fax Cover', 'Completed Date', and 'Insert'. There are also buttons for 'Add Template Activities', 'Add Master Activities', and 'Save Settings'. A table of activities is displayed below the buttons.

Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	<a href="#">General Documents and Orders</a>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Buyer's Inspection Advisory</a>	5/25/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Counter Offer(s)</a>	5/25/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Intro letter</a>	5/25/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Lender info (pre-qual/app letter)</a>	5/25/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Open escrow</a>	5/25/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click **Save Settings** to save the filter selection for future use.

## Adding Template Activities

1. Click **Add Template Activities**.
2. Select the **Activity Template**.
3. Click **Continue**. The **Activities List** appears.
4. Click **Add Activities**. A list of all activities in the system that are not in this transaction template appears.
5. Click the activities you want to add to this template.
6. Click **Add Template Activities**.

## Adding Master Activities

1. Click **Add Master Activities**.
2. Click the activities you want to add.
3. Click **Add New Activities**.

## Adding One-time Activities

1. Click **Add Master Activities**.
2. Enter the activities you want to add in the appropriate activity section.
3. Click **Add New Activities**.

## Removing Activities

1. Select the activity you want to remove.
2. Click **Remove**.

## Updating Due Dates

You can update due dates for your activities several ways:

- Select the **Activity**, enter the date in the **Due** field, then click **Update**:

The screenshot shows the 'Activities' window with a table of activities. The 'Update' button is highlighted with an arrow. The 'Due' field for 'Buyer's Inspection Advisory' is also highlighted with an arrow.

Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	General Documents and Orders		<input type="checkbox"/>			
<input type="checkbox"/>	Buyer's Inspection Advisory	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Counter Offer(s)	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Intro letter	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Lender info (pre-qual/app letter)	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Open escrow	5/25/2006	<input type="checkbox"/>			

You can select multiple activities to update at once.

- Select the **Activity**, click the **Calendar Icon**, select the date, then click **Update**:

The screenshot shows the 'Activities' window with a table of activities. The 'Calendar Icon' for 'Buyer's Inspection Advisory' is highlighted with an arrow.

Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	General Documents and Orders		<input type="checkbox"/>			
<input type="checkbox"/>	Buyer's Inspection Advisory	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Counter Offer(s)	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Intro letter	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Lender info (pre-qual/app letter)	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Open escrow	5/25/2006	<input type="checkbox"/>			

- Open the **Key Dates** section, change the **Key Date**, then click **Update Activities**.

## Entering Completion Dates

Select the **Activity**, enter the date manually in the **Completed** field, then click **Update**:

The screenshot shows the 'Key Dates' window with a table of activities. The 'Update' button is highlighted with an arrow. The 'Completed' field for 'Buyer's Inspection Advisory' is also highlighted with an arrow.

Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	General Documents and Orders		<input type="checkbox"/>			
<input type="checkbox"/>	Buyer's Inspection Advisory	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Counter Offer(s)	5/25/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Intro letter	5/25/2006	<input type="checkbox"/>			

You can select multiple activities to update at once. You can also click the grey box next to the **Completed** field to automatically insert today's date.

## Setting Alerts

You can set up alerts to notify contacts about activity completion, or to remind them about due dates.

1. Click on the bell to the right of the activity Due date.

The screenshot shows the 'Activities' page with a table of activities. The table has columns for Priority, Activity, Due, Completed, Log, Orders, and Docs. The 'Due' column shows dates like 5/25/2006. An arrow points to the bell icon next to the 'Completed' checkbox for the first activity, 'General Documents and Orders'.

The **Activity Reminder** page appears.

The screenshot shows the 'Activity Reminder' page for 'E-04b Physical Inspection Report'. It has a section for 'Reminder On Completion' with a checkbox. Below is a 'Reminder for Due Date' section with a calendar grid. The grid has columns for 'No. of days Before due date' and 'No. of days Past due'. Below the grid is a 'Contacts' section with a list of contacts and checkboxes to select them for reminders.

No. of days Before due date														On due date	No. of days Past due													
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**Contacts**

- ☐ **Transaction Coordinator:** Karen Jones, East Office (Fax: 7775553015)
- ☐ **Seller's Agent:** Bill Baxter, East Office (Email: bbaxter04@hotmail.com)
- ☐ **CLOSING:** Jeffrey Smith, Sunny Day Escrow (Mira Loma) (Email: jsmith041@yahoo.com)
- ☐ **HOME WARRANTY:** Nancy Richards, Acme Home Warranty (Carson) (Email: nrichards04@yahoo.com)
- ☐ **TITLE:** John Brown, Bright New Title (Irvine) (Email: jbrown042@yahoo.com)
- ☐ **INSPECTOR - Home Inspection:** Chris Klinger, Check Out Home Inspection (Norwalk) (Email: cklinger04@yahoo.com)
- ☐ **INSPECTOR - Home Inspection:** Tammy white, Check Out Home Inspection (Norwalk) (Email: tammy@fnis.com)
- ☐ **INSPECTOR - Pest Control Inspection:** Chris Klinger, Check Out Home Inspection (Norwalk) (Email: cklinger04@yahoo.com)

\* No contact information available

2. Select the reminders you want to send. If you select multiple boxes, multiple alerts are sent.
3. Select the **Contacts** you want to receive the reminders.
4. Click **Submit**.

## Accessing Activity Logs

Activity logs record comments about specific activities. You cannot modify or delete these comments. The comment log may be accessible to the Buyer/Seller should the activity be marked as Public.

1. Click **L** under the Log heading on the activity line.

The screenshot shows the 'Activities' page with a table of activities. The 'Log' column header is highlighted with an arrow.

Priority	Activity	Due	Completed	Log	Orders	Docs
	General Documents and Orders					
	Buyer's Inspection Advisory	5/25/2006				
	Counter Offer(s)	5/25/2006				

2. Enter your comment.
3. Click **Submit**.

## Printing Fax Cover Sheets

1. Select the activity for which you want to print a Fax cover sheet.

The screenshot shows the 'Activities' page with a table of activities. An arrow points to the 'Fax Cover' button.

Priority	Activity	Due	Completed	Log	Orders	Docs
	General Documents and Orders					
	Buyer's Inspection Advisory	5/25/2006				
	Counter Offer(s)	5/25/2006				
	Intro letter	5/25/2006				

2. Click **Fax Cover**. The **Fax Cover Sheet** page appears.

The screenshot shows the 'TransactionPoint Fax Cover Sheet' page with a table of transactions. The 'Include in Customized Archive' column is highlighted.

Trans #	Property Address	Activity	File Name	Remove Cover Sheet	Include in Customized Archive
255973-255092	3232 Clearview Lane, McKinney, TX 75070	RPA	RPA	<input type="checkbox"/>	<input type="checkbox"/>
255973-255092	3232 Clearview Lane, McKinney, TX 75070	Lender info (pre-qual/app letter)	Lender info (pre-qual/app letter)	<input type="checkbox"/>	<input type="checkbox"/>

When you create a fax cover sheet from the Transaction Center, within your user profile in the Transaction Center, and in the Order section of your transaction, you can choose to have the system delete the fax cover sheet when the fax is posted to TransactionPoint.

3. Check the box in the **Include in Customized Archive** column.

**Note:** For more information on archiving your transactions, see *Archiving Transactions* on page 44.

- Click **Submit**. The **Fax Cover Sheet** appears.

**Fax Cover Sheet**

TransactionPoint FIDELITY

Darlene Potter  
Transaction Point  
Fax To: (866)309-2023  
Please place this cover sheet on top of document.

Date: \_\_\_\_\_ # of Pages: \_\_\_\_\_

Process ID: 80801

Notes:

File Name: Package 1  
Transaction Number: 2580  
Site ID: 7-Q1  
Property Address: 123 Main, Santa Ana, CA  
User ID: 3034  
Document Type: Activity (573): HOA Package Ordered

**Note:** The Dispatcher (service provider) can create a fax cover sheet from the Order Center. See *Editing an Order* on page 55.

## Printing Multiple Documents

You can print multiple documents from the **Transaction Documents** section of the **Activities/Orders/Docs** page.

- Open the transaction and click the **Activities/Orders/Docs** tab.
- In the **Transaction Documents** section select the check boxes of the documents you want to print and click **Print**.

Transaction Documents

Mail Move/Copy Privilege Rename Archive Remove Print Upload Document

<input type="checkbox"/>	Name	Approved	Archive	Tracking#	Upload Date	Log	Privilege
<input type="checkbox"/>	<a href="#">Buyer's Agency Disclosure</a>	<input type="checkbox"/>	<input type="checkbox"/>	6225-6428	10/26/2007 3:00:41 PM (PDT)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">HOA By-Laws</a>	<input type="checkbox"/>	<input type="checkbox"/>	6225-6428	10/26/2007 9:50:19 PM (PDT)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Home Warranty</a>	<input type="checkbox"/>	<input type="checkbox"/>	6225-6428	10/26/2007 2:59:10 PM (PDT)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Homeowner Association Information</a>	<input type="checkbox"/>	<input type="checkbox"/>	6225-6428	10/26/2007 3:00:13 PM (PDT)	<input type="checkbox"/>	<input type="checkbox"/>

Mail Move/Copy Privilege Rename Archive Remove Print Upload Document

3. In the **Documents - Print** page, click **Yes, Continue**.

**Documents - Print**

**List of Transaction Documents selected**

Buyer's Agency Disclosure  
HOA By-Laws  
Home Warranty

Depending on the size of the selected documents, this process may take a minute or more to complete.  
Do you want to continue?

Yes, Continue No, Please Cancel!

**Note:** This step gives you the option to either continue assembling and printing the documents or cancelling the process. If you continue, during the assembling of the documents you again have the option of cancelling the operation.

4. In the PDF page, you can:

- Print the documents by selecting **File>Print**.
- Save the documents (as a single document) by selecting **File>Save**.

## Working with Activity Documents

The letter **D** appears under the document's heading on the activity line for activities preset to be associated with documents. You can use the document box to store documents related to the specific activity.

**Activities** Print

Filter by Task Type: Show All  
Filter by Task Status: Show All

Update Remove Fax Cover Completed Date Insert Add Template Activities Add Master Activities Save Settings

Priority	Activity	Due	Completed	Log	Ord	Docs
<input type="checkbox"/>	General Documents and Orders		<input type="checkbox"/>	<input type="checkbox"/>		D
<input type="checkbox"/>	Buyer's Inspection Advisory	5/25/2006	5/26/2006	<input type="checkbox"/>		D
<input type="checkbox"/>	Counter Offer(s)	5/25/2006		<input type="checkbox"/>		D
<input type="checkbox"/>	Intro letter	5/25/2006		<input type="checkbox"/>		D
<input type="checkbox"/>	Lender info (pre-qual/app letter)	5/25/2006		<input type="checkbox"/>		D
<input type="checkbox"/>	Open escrow	5/25/2006		<input type="checkbox"/>		D
<input type="checkbox"/>	RPA	5/25/2006	5/26/2006	<input type="checkbox"/>		D

A paper clip next to the **D** indicates that there is a document in the box.

## Uploading a Document

1. Click **D**. The Activity Document List appears.

**Activity Document List** Close

Transaction #: 255973-255092  
Property: 3232 Clearview Lane, McKinney, TX 75070  
Closing #:   
Contract Acceptance Date: 5/24/2006  
Property Type: Single Family  
Sales Price: \$396,599.00  
Estimated Closing Date: 6/10/2006  
Buyer's Agent: Robert Brown  
APN #:   
Age:

**Activity: RPA**

- Select inbox documents to move to the current activity, or upload a document to the current activity.
- Manage Activity Documents: view, mail, move, change access privileges or view access history.

**Inbox Documents**

Document Name	Date
---------------	------

**Document Upload**

Document Name:  \*

Select File:  Browse...

Document Security: ☒ Document is Public ☐ Document is Private

Include in Customized Archive: ☐ Yes ☒ No

Upload

**Activity Documents**

Name	Approved	Tracking#	Upload Date	Log	Privilege
<input type="checkbox"/> RPA	<input type="checkbox"/>	255973-255092	5/26/2006 2:44:20 PM (MDT)		

Mail Move Rename Remove

Close

2. Type the **Document Name**, or use the default document name.
3. Click **Browse**.
4. Select the document to be uploaded.
5. Select **Document Security**.
6. Select **Yes** if you want to include this document in a customized archive.
7. Click **Upload**.

To view a document, click on the document name. To assign specific privileges to this document, click the letter **P** on the right of the document line.

## Emailing an Activity Document

1. Select the document.

• Manage Activity Documents: view, mail, move, change access privileges or view access history.

**Inbox Documents**

Document Name	Date
---------------	------

**Document Upload**

Document Name:  \*

Select File:  Browse...

Document Security: ☒ Document is Public ☐ Document is Private

Include in Customized Archive: ☐ Yes ☒ No

Upload

**Activity Documents**

Name	Approved	Tracking#	Upload Date	Log	Privilege
<input type="checkbox"/> RPA	<input type="checkbox"/>	255973-255092	5/26/2006 2:44:20 PM (MDT)		

Mail Move Rename Remove

Close

2. Click **Mail**. The **Mail Documents** page appears.

**MAIL DOCUMENTS**

**List of documents selected**

1) Mortgage Ord.

**Select Recipients**

☐ **Seller's Agent:** Bill Baxter, East Office <sup>\*</sup>

☐ **CLOSING:** Jeffrey Smith, Sunny Day Escrow (Mira Loma) (Email: jsmith041@yahoo.com)

☐ **TITLE:** John Brown, Bright New Title (Irvine) (Email: jbrown042@yahoo.com)

☐ **HOME WARRANTY:** Nancy Richards, Acme Home Warranty (Carson) (Email: nrichards04@yahoo.com)

☐ **INSPECTOR - Pest Control Inspection:** Chris Klinger, Check Out Home Inspection (Norwalk) (Email: cklinger04@yahoo.com)

☐ **INSPECTOR - Home Inspection:** Chris Klinger, Check Out Home Inspection (Norwalk) (Email: cklinger04@yahoo.com)

☐ **INSPECTOR - Home Inspection:** Tammy white, Check Out Home Inspection (Norwalk) (Email: tammy@fnis.com)

<sup>\*</sup> No Email specified or the user might have different notification or no notification method.

**Mail Options**

**Enter Other Recipients:**  (separated by ', ')

**Subject:**

**Message:**

3. Select the **Recipients**.
4. Enter any **Other Recipients**, separated by a comma.
5. Enter a **Subject**.
6. Enter a **Message**.
7. Click **Send**.



## Using Default Activity Reminders

The Site Administrator can set default email reminders for you. All new transactions then have reminders set for the specified activities.

When a transaction is created and activities are populated into the transaction, you see red bells for reminders that are set and blue bells for reminders that are not set.

Priority	Activity	Due	Completed	Log	Orders	Docs
2	Activity1	3/24/2006				
	Activity2					
3	AD-11	3/23/2006				
	Appraisal Ordered	3/14/2006				
1	Debs Activity	4/7/2006				
	General Documents and Orders					
	HOA Package Sent to Buyer for Approval	3/18/2006				
	Loan - Contract to Lender	3/18/2006				
	SDS	3/16/2006				

You can change the settings and include additional participants to receive email reminders. To view the settings on the

email reminder, click the bell. A pop-up box appears and you can view the default settings.

Activity Reminder

Activity: AD-11

Due Date: 3/23/2006

☒ Reminder On Completion

Reminder for Due Date

No. of days Before due date	On due date	No. of days Past due
<input type="checkbox"/> >7 <input type="checkbox"/> 7 <input type="checkbox"/> 6 <input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input checked="" type="checkbox"/> 2 <input type="checkbox"/> 1	<input checked="" type="checkbox"/>	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> >7

Contacts

☒ **Transaction Coordinator:** Angel Ochoa, Branch B -Hope Realty (Email: angel@mail.qa.trpoint.com)
 ☐ **Seller's Agent:** Star Blake, Hope Realty (Email: service@qa.trpoint.com)
 ☐ **Buyer's Agent:** Julia Listingagent, The Real Estate Co (Email: service@qa.trpoint.com)
 ☐ **Seller:** Chris Seller (Email: service@qa.trpoint.com)
 ☐ **Buyer:** Benji Buyer (Email: service@qa.trpoint.com)
 ☐ **CLOSING:** Jack Johnson, Hoaky Escrow (Email: service@qa.trpoint.com)

\* No contact information available

Submit

Cancel

You can change the default settings or add participants to receive the reminders.

## Viewing Default Activities Priveleges and Archive Settings

The Site Administrator can set each activity to default to Public or Private:

- Public makes the activity viewable to all parties named in the transaction.
- Private makes the activity viewable only to the Primary Agent, Transaction Coordinator, and Super User.

---

**Note:** You cannot change the privilege. This may be done by the Site Administrator only.

---

To view whether an activity is Public or Private, click on the activity name from the **Activities/Orders/Docs** tab within the

transaction.

Transaction Summary

Transaction Contacts

**Activities/Orders/Docs**

Communications Log

Key Dates

Print

Activities

Print

Filter by Task Type:

Show All

Filter by Task Status:

Show All

Save Settings

Add Template Activities

Add Master Activities

Update

Remove

Fax Cover

Completed Date

Insert

Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/> 2	<a href="#">Activity1</a>	3/24/2006	<input type="checkbox"/>			
<input type="checkbox"/>	<a href="#">Activity2</a>		<input type="checkbox"/>			
<input checked="" type="checkbox"/> 3	<a href="#">AD-11</a>	3/23/2006	<input type="checkbox"/>			
<input type="checkbox"/>	<a href="#">Appraisal Ordered</a>	3/14/2006	<input type="checkbox"/>			
<input type="checkbox"/> 1	<a href="#">Debs Activity</a>	4/7/2006	<input type="checkbox"/>			
<input type="checkbox"/>	<a href="#">General Documents and Orders</a>		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	<a href="#">HOA Package Sent to Buyer for Approval</a>	3/18/2006	<input type="checkbox"/>			
<input type="checkbox"/>	<a href="#">Loan - Contract to Lender</a>	3/18/2006	<input type="checkbox"/>			
<input type="checkbox"/>	<a href="#">SDS</a>	3/16/2006	<input type="checkbox"/>			

A pop-up window appears showing the privilege (see arrow **A** below).

**Activity Rules**

**Activity Description:** HOA Package Sent to Buyer for Approval

**Activity Category:** Contingencies

**Agent Represents:** Seller

**Activity Rule:** number of days after a key date

**Key Date:** Contract Acceptance Date

**Auto Schedulable?** Yes

**Orderable Activity?** Yes Service Category: Inspection Type: Asbestos Inspection

**Upload Documents?** Yes

**When completing this activity:** Doesn't Cancel or Close the transaction

**"Due" Activity will be displayed in Calendar?** Yes

**Activity is Public or Private?** Public

**Include in Customized Archive?** No

**Default Document Name:** HOA Package's

**Document Privilege** Private - Buyer, Seller, Seller's Agent

**Activity Help**

HOA Package Sent to Buyer for Approval

The Site Administrator can also set each activity to be included in the Customized Archive CD burn. If an activity is set to **No**, it is not included in the Customized Archive CD that you or an agent creates (see arrow **B** above).

**Note:** You cannot change this option. This may be done by the Site Administrator only.

To set activities using the **Customized Archive** feature, see *Customizing Archive Options* on page 47.

## Placing Activity Orders

If there is an **O** in the Orders column for an activity, you can place an order for that activity.

**Activities**

**Filter by Task Type:**

**Filter by Task Status:**

Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/> General Documents and Orders					
<input checked="" type="checkbox"/> E-04b Physical Inspection Report	10/24/2005				
<input type="checkbox"/> E-04a Order Physical Inspection or Waiver					
<input type="checkbox"/> E-03 Termite Clearance					
<input type="checkbox"/> E-02b Termite Report					
<input type="checkbox"/> E-02a Order Termite Inspection					

1. Click **O**. The Select Provider page appears.

Select Provider (Existing or Create)

Add New Company

Select

Cancel

Contact Type:

INSPECTOR

Home Inspection

Providers:

Show Preferred Only

Search for:

All

Search

Contacts

Company	Branch	Contact(s)
Check Out Home Inspection	Check Out Home Inspection (Norwalk) 5556 Rosecrans Ave. Norwalk, CA 90650	<div><div>Chris Klinger ✓ ●</div><div>Tammy white ★</div></div>

Add New Branch

Add New Contact

Select

★Indicates "Preferred Provider"

✓Indicates "Agent Preferred"

▲Indicates "My Packet Services"

●Indicates "Agent's Packet Services"

Add New Company

Select

Cancel

2. Select the **Provider Contact**.

3. Click **Select**. The **Place Order** page appears.

**Place Order**

Listing Price: \$ 500,000.00  
Transaction ID: 27217-26541  
Representation/Status: Seller/Pending  
Property Address: 1234 Test Drive  
San Jose , CA 95132  
MLS No.

Sales Price: \$ 510,000.00  
Year Built/Age: 1974/32  
Contract Acceptance: 03/13/2006  
Seller(s): Chris Seller  
Seller's Agent: Star Blake  
APN:

Escrow/Closing No.  
Escrow/Closing: Jack Johnson  
Estimated Closing Date: 04/12/2006  
Buyer(s): Benji Buyer  
Buyer's Agent: Julia Listingagent

Service Provider: Jack Johnson  
Company: Hoaky Escrow  
Address: 1452 Hoaky Lane  
San Jose, CA 95132

Phone: 408-888-8888  
Fax Number:  
Email: service@qa.trpoint.com  
Company URL:  
Notification Preference: None

Please choose a product:  
☒ Closing

Transaction Contacts and Participants to be Notified of this Order:

Role	Name	Contact Information	Delivery Method	Notify?
Buyer	<a href="#">Benji Buyer</a>		None	<input type="radio"/> Yes <input checked="" type="radio"/> No
Buyer's Agent	<a href="#">Julia Listingagent</a> The Real Estate Co		None	<input type="radio"/> Yes <input checked="" type="radio"/> No
Seller	<a href="#">Chris Seller</a>		None	<input type="radio"/> Yes <input checked="" type="radio"/> No
Seller's Agent	<a href="#">Star Blake</a> Hope Realty	949-221-3493	Email: service@qa.trpoint.com	<input type="radio"/> Yes <input checked="" type="radio"/> No
Closing	<a href="#">Jack Johnson</a> Hoaky Escrow	408-888-8888	None	<input type="radio"/> Yes <input checked="" type="radio"/> No
TC	<a href="#">Angel Ochoa</a> Branch B -Hope Realty	949-221-3493	Email: angel@mail.qa.trpoint.com	<input type="radio"/> Yes <input checked="" type="radio"/> No

Other Information

Order Details

Documents Attached:

Attach Documents

Attached Documents

Special Instructions:

Cancel

Submit

4. Select the **Contacts** to be notified of the order.
5. Select your First, Second and Third Choice **Appointment Request** if placing an order for inspections (or other appointments).
6. If you want to make documents available to the provider, click **Upload Documents**, enter the **Document Name**, select the file, and click **Submit**.
7. Enter any **Special Instructions**.
8. Click **Submit**. The **Order Placed** page appears.
9. Click **Close**.

# Printing Due/Past Due Activities

1. Click the **Transactions** tab.
2. Click **Transaction Center**. The **Transaction Center** page appears.
3. Select the search criteria for the transaction.
4. Click **Search**. The page refreshes to display a list of properties that match the search criteria.

The screenshot shows the 'Transaction Center' interface. At the top, there's a 'Submit a New Transaction' button and a 'Create Transaction' button. Below this, there are buttons for 'Assist a TC' and 'Print Page'. The main section is titled 'Transaction Coordinator: Shaw, Karalie' with a 'Save Settings' button. It contains several dropdown menus for 'Branch' (set to 'Show All'), 'Agent' (set to 'Show All'), 'Agent Represents' (set to 'Show All'), 'Status' (set to 'Pending'), and 'With' (set to 'Show All'). There's also an 'Other Filters' section with a dropdown for 'Property Address' and a 'Search' button. Below the filters is a 'Transaction Search Results' section. It includes a table with columns: 'Trans #', 'Property Address', 'Status', 'Primary Agent', 'Closing/Escrow #', 'Principals (B or S)', and 'Est. Closing'. There are three rows of results. The first row has a green checkmark in the 'Est. Closing' column, which is circled in red. Below the table are buttons for 'Print Due/Past Due Activities', 'Transfer', and 'Fax Cover'. The total number of transactions is 3.

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Est. Closing
<a href="#">4836-5045</a>	1950 Emerson Lane Frisco, TX 75035	Pending	Gardner, Christian	656-2459	(B) Boston, Tim	06/15/2006 <input checked="" type="checkbox"/>
<a href="#">4940-5149</a>	627 TEST Lane McKinney, TX 75070	Pending	Garcia, John		(S) Leeland, Jan	07/13/2006 <input type="checkbox"/>
<a href="#">4963-5172</a>	5200 Everett Lane Everett, WA 98204	Pending	Gardner, Christian			08/17/2006 <input type="checkbox"/>

5. Select the transaction(s) for which you want to run the report.
6. Click **Print Due/Past Due Activities**.

## Maintaining Transactions

After you create a transaction, you can modify the information, if necessary. For example, you can:

- Add a co-agent
- Add an existing or new contact
- Add an existing or new provider
- Add or order packet services

### Adding a Co-Agent

1. Select the appropriate transaction.
2. Click Transaction Contacts.
3. Click **Add Co-Seller's Agent** or **Add Co-Buyer's Agent**.

**Note:** The transaction representation chosen when you created the transaction determines whether the Add Co-Seller's

or Add Co-Buyer's Agent button appears.

The screenshot shows the 'Transaction Contacts' page with tabs for Transaction Summary, Transaction Contacts, Activities/Orders/Docs, and Communications Log. The Transaction Contacts section has buttons for Add Provider, Add Contact, Write Letter, Print Page, Add Packet Services, and Order Packet Services. Below these are two agent sections: Transaction Coordinator and Seller's Agent. The Transaction Coordinator section shows details for Moore, Jan. The Seller's Agent section shows details for Akins, Bill. An arrow points to the 'Add Co-Seller's Agent' button located between the two agent sections.

4. In the Co-Agent popup window, select the branch and agent, then click **Submit**.

The screenshot shows the 'Add Co-Seller's Agent' popup window. It has a 'Branch' dropdown menu set to 'ABC Realty - Glendale Branch' and an 'Agent' dropdown menu set to 'Anderson, Karen'. There is a 'Private Contact?' checkbox with 'Yes' and 'No' radio buttons. At the bottom are 'Submit' and 'Cancel' buttons.

The co-agent is added to the Transaction Contacts page.

The screenshot shows the 'Transaction Contacts' page after the co-agent has been added. The Transaction Coordinator section remains the same. The Seller's Agent section shows details for Akins, Bill. A new 'Co-Seller's Agent' section has been added at the bottom, showing details for Anderson, Karen. The 'Add Co-Seller's Agent' button is no longer visible, and the 'Change/Edit' and 'Remove' buttons are now present for the Co-Seller's Agent.

Transaction access for a co-agent is determined by several factors:

- If the primary and co-agents are both Full Access Agents, then the co-agent will have full access.
- If the primary agent's access is Full and the co-agent's access is View Only, then the co-agent will have view only access.



- If the primary agent's access is View Only and the co-agent's access is Full, then the co-agent will have view only access.

## Additional Information About Adding Co-Agents

You can add multiple co-agents to a transaction. However, when archived, only the first six agents (one primary agent and five co-agents) will appear on the summary page of the transaction archive. Also, the prefix "co-" will be removed from the title of all co-agents appearing on this page.

## Adding an Existing Contact

1. Select the appropriate transaction.
2. Click **Transaction Contacts**.
3. Click **Add Contact**. The **Add Contact** page appears.

### Add Existing Contact

**Search:** To find a name, choose the category, then type the first name or last name or company name in Keyword, and hit the SEARCH button.  
**Add Existing Contact:** To add a contact to this transaction, select their name below and hit the ADD EXISTING CONTACT button.

Choose Category:

Search On:

Search Text:

OR

### Add New Contact

**Add New Contact:** To add a new contact, choose the category, give first name, last name and other details and hit the ADD NEW CONTACT button.

Category:

First Name:  Last Name:

Company:

Address:  Address(contd.):

City:  State:  Zip:

Country:

Fax:  Email:

Home Phone:  Work Phone:

Mobile/Cell:  Cell Domain:

Pager:  Pager PIN: ☐ Yes ☒ No

Voice Mail:  Website:

Receive Notification By: ☒ None ☐ Email ☐ Fax

Comments:

4. Select the search **Category**.
5. Select the name to **Search On**.
6. Enter the **Search Text**.
7. Click **Search**. The page refreshes to show contacts that match your criteria.
8. Select the contact to add.

9. Click **Submit**.

## Adding a New Contact

1. Select the appropriate transaction.
2. Click **Transaction Contacts**.
3. Click **Add Contact**. The **Add Contact** page appears.

**Add Existing Contact**

**Search:** To find a name, choose the category, then type the first name or last name or company name in Keyword, and hit the SEARCH button.

**Add Existing Contact:** To add a contact to this transaction, select their name below and hit the ADD EXISTING CONTACT button.

Choose Category:

Search On:

Search Text:

OR

**Add New Contact**

**Add New Contact:** To add a new contact, choose the category, give first name, last name and other details and hit the ADD NEW CONTACT button.

Category:	<input type="text" value="APPRAISAL"/>	
First Name:	<input type="text"/>	Last Name: <input type="text"/>
Company:	<input type="text"/>	
Address:	<input type="text"/>	Address(contd.): <input type="text"/>
City:	<input type="text"/>	State: <input type="text"/> Zip: <input type="text"/>
Country:	<input type="text" value="USA"/>	
Fax:	<input type="text"/>	Email: <input type="text"/>
Home Phone:	<input type="text"/>	Work Phone: <input type="text"/>
Mobile/Cell:	<input type="text"/>	Cell Domain: <input type="text"/>
Pager:	<input type="text"/>	Pager PIN: <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="text"/>
Voice Mail:	<input type="text"/>	Website: <input type="text"/>

Receive Notification By: ☒ None ☐ Email ☐ Fax

Comments:

4. Enter the new contact information. **First** and **Last Name** are required fields.
5. Click **Add New Contact**.

## Adding an Existing Provider

1. Select the appropriate transaction.
2. Click **Transaction Contacts**.

3. Click **Add Provider**. The **Select Provider** page appears.

**Select Provider (Existing or Create)**

Add New Company Select Cancel

Contact Type: APPRAISAL

Providers: Show Preferred Only

Search for: All

Search

Add New Company Select Cancel

4. Select the **Contact Type**.
5. Select the **Provider type**.
6. Select the **Search for** name.
7. Type at least two letters of name.
8. Click **Search**. The page refreshes to show providers that match your criteria.
9. Select the provider you want to add.
10. Click **Select**.

## Adding a New Provider

1. Select the appropriate transaction.
2. Click **Transaction Contacts**.
3. Click **Add Provider**. The **Select Provider** page appears.

**Select Provider (Existing or Create)**

Add New Company Select Cancel

Contact Type: APPRAISAL

Providers: Show Preferred Only

Search for: All

Search

Add New Company Select Cancel

4. Select the **Contact Type**.
5. Select the **Provider type**.
6. Select the **Search for** name.
7. Type at least two letters of the name.

8. Click **Search**. The page refreshes to show providers that match your criteria.
9. Click **Add New Company**. The **Add Company** page appears.

Add Company - TC

---

**Contact Type** APPRAISAL  
**Service Type** Appraisal

---

**Company Name:** \*

**Company Address:**

**Address 1:** \*   
**Address 2:**   
**City:** \*  **State:** TX   
**ZIP:** \*

**Website:**   
**Email:**   
**Work:**   
**Fax:**

---

**Branch Name:** \*  ☐ same as Company

---

**Branch Address:** ☐ same as Company

**Address 1:** \*   
**Address 2:**   
**City:** \*  **State:** TX   
**ZIP:** \*   
**Region:**

**Website:**   
**Email:**   
**Work:**   
**Fax:**   
**Send New Registration Email:** ☒

---

☒ Service Provider

---

**Contact's Name:**

**First:** \*  **Middle:**   
**Last:** \*

---

**Contact's Address:** ☐ same as Branch

---

**Address 1:** \*   
**Address 2:**   
**City:** \*  **State:** TX   
**ZIP:** \*

**Website:**   
**Email:**   
**Home:**   
**Work:**   
**Fax:**   
**Cell:**   
**Domain:**   
**Voice Mail:**   
**Pager:**   
**Pin:**   
**Delivery Preference:** None

---

**Service Types:**

Appliance  
Asbestos ☒  
Asbestos Inspection  
Chimney Inspection

---

☐ ID as Preferred Provider  
☐ Notify Dispatcher of order placed  
Private Contact ? ☐ Yes ☒ No

---

**Document Privilege:**
☐ Private ☒ Public

---

**Username:** \*   
**Password:** \*   
**Password:** \*   
 (confirm)  
**Email** ☒  
**Password to User** ☒

10. Enter the company information. Required fields are marked with asterisks (\*).

11. Click **Add New Provider**.

## Adding Packet Services

1. Select the appropriate transaction and click **Transaction Contacts**.
2. Click **Add Packet Services** to open the **Packet Services** page.

The screenshot shows the 'Transaction Contacts' page. At the top, there are four tabs: 'Transaction Summary', 'Transaction Contacts' (which is selected), 'Activities/Orders/Docs', and 'Communications Log'. Below the tabs, there is a sub-header 'Transaction Contacts' with buttons for 'Add Provider', 'Add Contact', 'Write Letter', and 'Print Page'. Below this, there is a button 'Add Packet Services' which is highlighted with a black box and an arrow pointing to it from the left. To the right of 'Add Packet Services' is a button 'Order Packet Services'. Below these buttons, there is a section for 'Transaction Coordinator' with contact information for 'Moore, Jan' and buttons for 'Edit' and 'Create vCard'.

3. In the **Packet Services** page select the list you want to add.

The screenshot shows the 'Packet Services' page. At the top, there is a header 'Packet Services' and a note: 'Unchecking the select checkbox will remove the provider from the transaction'. Below this is a section 'My Packet Services' with a 'Packet Services List' dropdown set to 'Residential Service Providers'. There are two entries in this list. The first entry has 'Contact Type: Appraisal', 'Contact Info: Dave Scott - San Gabriel Appraisers' (checked), and 'Private Contact?' set to 'No'. The second entry has 'Contact Type: Escrow', 'Contact Info: Clem Roberts - Eagle Rock Valley Closing' (checked), and 'Private Contact?' set to 'No'. There is also an unchecked 'Contact Info: Elizabeth Knoll - College Escrow'. At the bottom of this section are 'Select' and 'Cancel' buttons. Below this is a section 'Real Estate Agent Packet Services' with 'Real Estate Agent' set to 'Karen Anderson (ABC Realty - Glendale Branch)'. The 'Packet Services List' dropdown is set to 'KAnderson - Residential'. There are two entries in this list. The first entry has 'Contact Type: Appraisal', 'Contact Info: Dave Scott - San Gabriel Appraisers' (checked), and 'Private Contact?' set to 'No'. The second entry has 'Contact Type: Home Warranty', 'Contact Info: Josh McMannis - Home Warranty Services' (checked), and 'Private Contact?' set to 'No'. There is also an unchecked 'Contact Info: Jim Augustino - Warranty Services'. At the bottom of this section are 'Select' and 'Cancel' buttons.

- Select a Transaction Coordinator's list from the **My Packet Services** section.
- Select an agent's list from the **Real Estate Agent Packet Services** section.

---

**Note:** The primary agent for the transaction always appears in the Agent Packet Services section.

---

4. Modify the list, if necessary.

- To remove a provider, clear the check box adjacent to that provider.
- To include multiple providers in a service category, select the check boxes of the additional providers you want to add.

---

**Note:** For multiple providers in a category the first provider is a default selection. You can remove this provider by clearing the associated check box and a different provider by then selecting another provider's check box.

---

5. Decide if you want contact information to be kept private or be available publicly by selecting the appropriate option for each service provider.

6. Click **Select** in the section of the **Packet Services** page (My Packet Services or Real Estate Agent Packet Services) to add that specific packet to the transaction.

<b>APPRAISAL</b> <a href="#">Scott, Dave</a> - San Gabriel Appraisers 1514 South California Ave. Monrovia, CA 91016 USA <b>Email:</b> <a href="mailto:dscott@sangabapp">dscott@sangabapp</a> <a href="#">Comments:</a>	<b>Home:</b> <b>Work:</b> (626) 776-2000 <b>Fax:</b> (626) 776-1778 <b>URL:</b>	<b>Cell:</b> <b>Pager:</b> <b>Voice Mail:</b> <b>Private Contact:</b> No <input type="button" value="Place Order"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Create vCard"/>
<b>HOME WARRANTY</b> <a href="#">McMannis, Josh</a> - Home Warranty Services 1425 East Foothill Blvd. Glendora, CA 91741 USA <b>Email:</b> <a href="mailto:joshm@hws.com">joshm@hws.com</a> <a href="#">Comments:</a>	<b>Home:</b> <b>Work:</b> (626) 333-5768 <b>Fax:</b> (626) 333-1009 <b>URL:</b>	<b>Cell:</b> <b>Pager:</b> <b>Voice Mail:</b> <b>Private Contact:</b> No <input type="button" value="Place Order"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Create vCard"/>
<b>HOME WARRANTY</b> <a href="#">Augustino, Jim</a> - Warranty Services 2543 Foothill Blvd. Claremont, CA 91711 USA <b>Email:</b> <a href="mailto:jauugustino@warrantyservices.com">jauugustino@warrantyservices.com</a> <a href="#">Comments:</a>	<b>Home:</b> <b>Work:</b> (909) 432-9743 <b>Fax:</b> (909) 432-1119 <b>URL:</b>	<b>Cell:</b> <b>Pager:</b> <b>Voice Mail:</b> <b>Private Contact:</b> No <input type="button" value="Place Order"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Create vCard"/>

Example of a single provider added to a service category

Example of multiple service providers added to a service category

---

**Note:** For details about setting up packet services, refer to *Setting Up Packet Services* in the Profiles & Preferences chapter.

---

You can now order packet services for the transaction.

## Ordering Packet Services

1. Select the appropriate transaction.
2. Click **Transaction Contacts**.

- Click **Order Packet Services**. The **Order Packet Services** page appears.

Place Order for Packet Service Providers		
Packet Service Providers for this transaction:		
Contact Type	Contact Info	Select
CLOSING (Escrow)	Jeffrey Smith - Sunny Day Escrow (Mira Loma)	<input type="checkbox"/>
HOME WARRANTY (Home Warranty)	Nancy Richards - Acme Home Warranty (Carson)	<input type="checkbox"/>
INSPECTOR (Home Inspection)	Chris Klinger - Check Out Home Inspection (Norwalk)	<input type="checkbox"/>
TITLE (Title)	John Brown - Bright New Title (Irvine)	<input type="checkbox"/>
		<input type="button" value="Cancel"/> <input type="button" value="Submit"/>

- Select the providers whose services you want to order.

- Click **Submit**. The **Place Order** page appears.

Place Order																																							
<div> <div>Listing Price: \$ 500,000.00</div> <div>Sales Price: \$ 510,000.00</div> <div>Escrow/Closing No.</div> </div> <div> <div>Transaction ID: 27217-26541</div> <div>Year Built/Age: 1974/32</div> <div>Escrow/Closing: Jack Johnson</div> </div> <div> <div>Representation/Status: Seller/Pending</div> <div>Contract Acceptance: 03/13/2006</div> <div>Estimated Closing Date: 04/12/2006</div> </div> <div> <div>Property Address: 1234 Test Drive</div> <div>Seller(s): Chris Seller</div> <div>Buyer(s): Benji Buyer</div> </div> <div> <div>San Jose , CA 95132</div> <div>Seller's Agent: Star Blake</div> <div>Buyer's Agent: Julia Listingagent</div> </div> <div> <div>MLS No.</div> <div>APN:</div> </div>																																							
<div> <div>Service Provider: Jack Johnson</div> <div>Phone: 408-888-8888</div> </div> <div> <div>Company: Hoaky Escrow</div> <div>Fax Number:</div> </div> <div> <div>Address: 1452 Hoaky Lane</div> <div>Email: service@qa.trpoint.com</div> </div> <div> <div>San Jose, CA 95132</div> <div>Company URL:</div> </div> <div> <div>Notification Preference: None</div> </div>																																							
<div>Please choose a product:</div> <div> <input checked="" type="radio"/> Closing </div>																																							
<div>Transaction Contacts and Participants to be Notified of this Order:</div> <table border="1"> <thead> <tr> <th>Role</th> <th>Name</th> <th>Contact Information</th> <th>Delivery Method</th> <th>Notify?</th> </tr> </thead> <tbody> <tr> <td>Buyer</td> <td><a href="#">Benji Buyer</a></td> <td></td> <td>None</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> </tr> <tr> <td>Buyer's Agent</td> <td><a href="#">Julia Listingagent</a> The Real Estate Co</td> <td></td> <td>None</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> </tr> <tr> <td>Seller</td> <td><a href="#">Chris Seller</a></td> <td></td> <td>None</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> </tr> <tr> <td>Seller's Agent</td> <td><a href="#">Star Blake</a> Hope Realty</td> <td>949-221-3493</td> <td>Email: service@qa.trpoint.com</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> </tr> <tr> <td>Closing</td> <td><a href="#">Jack Johnson</a> Hoaky Escrow</td> <td>408-888-8888</td> <td>None</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> </tr> <tr> <td>TC</td> <td><a href="#">Angel Ochoa</a> Branch B -Hope Realty</td> <td>949-221-3493</td> <td>Email: angel@mail.qa.trpoint.com</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> </tr> </tbody> </table>					Role	Name	Contact Information	Delivery Method	Notify?	Buyer	<a href="#">Benji Buyer</a>		None	<input type="radio"/> Yes <input checked="" type="radio"/> No	Buyer's Agent	<a href="#">Julia Listingagent</a> The Real Estate Co		None	<input type="radio"/> Yes <input checked="" type="radio"/> No	Seller	<a href="#">Chris Seller</a>		None	<input type="radio"/> Yes <input checked="" type="radio"/> No	Seller's Agent	<a href="#">Star Blake</a> Hope Realty	949-221-3493	Email: service@qa.trpoint.com	<input type="radio"/> Yes <input checked="" type="radio"/> No	Closing	<a href="#">Jack Johnson</a> Hoaky Escrow	408-888-8888	None	<input type="radio"/> Yes <input checked="" type="radio"/> No	TC	<a href="#">Angel Ochoa</a> Branch B -Hope Realty	949-221-3493	Email: angel@mail.qa.trpoint.com	<input type="radio"/> Yes <input checked="" type="radio"/> No
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Other Information				<input type="button" value="Order Details"/>																																			
<div>Documents Attached:</div> <div> <input type="button" value="Attach Documents"/> <div>Attached Documents</div> </div>																																							
<div>Special Instructions:</div> <div></div>																																							
				<input type="button" value="Cancel"/> <input type="button" value="Submit"/>																																			

6. Select the contacts you want notified of this order.
7. If you want to make documents available to the provider, click **Upload Documents**, enter the **Document Name**, select the file, and click **Submit**.
8. Enter any **Special Instructions**.
9. Click **Submit**. The **Order Placed** page appears.
10. Click **Close**.

## Customizing the Facing Sheet

You can access the facing sheet for your transaction under the **Transaction Summary** page.

The screenshot shows the 'Transaction Summary' page with four tabs: 'Transaction Summary', 'Transaction Contacts', 'Activities/Orders/Docs', and 'Communication Log'. The 'Transaction Summary' tab is active, and the 'Facing Sheet' sub-tab is selected. The 'Facing Sheet' sub-tab is highlighted with a red box. Below the tabs, there are buttons for 'Save' and 'Save/Next'. The main content area displays transaction details for Agent William Atkins, including listing dates, contract acceptance date, estimated closing date, listing price, sale price, loan type, loan amount, file number, escrow/closing number, title number, and cancellation date.

You may exclude the following areas in the printed version of your facing sheet by clearing the check box for those areas to exclude:


- Transaction Coordinator
- Closing Company
- Title Company
- Seller
- Buyer
- Seller's Agent
- Buyer's Agent
- Listing Commission
- Selling Commission
- Transaction Fees
- Lender Information
- Referral Fees

**Note:** If the Transaction Coordinator is different from the Full Access Agent, then both appear on the facing sheet. If there is no Transaction Coordinator, then the Full Access Agent is listed twice - first as the coordinator and second as the agent.



You can choose to print the facing sheet on letter-size or legal-size paper.

Facing Sheet		Close	Save	Print Letter Size	Print Legal Size
2451 Montrose Ave. Montrose, CA 91020		Transaction #: 6225-6428		APN#:	
Property Type: Single Family		MLS:		Mgr. Approval	



# Transferring Transactions

Transferring a transaction means passing transaction ownership. Only a transaction owner can transfer a transaction. Ownership is created either by creating the transaction or by being the recipient of a transaction transfer.

Either a Transaction Coordinator or a Full Access Agent can be a recipient. The only requirement is that the recipient must have access to the same branch as the transaction owner.

## Completing a Transfer

1. In the **Property Center** page, select the check box of the transaction you want to transfer and click **Transfer**. Multiple transactions can be transferred to another Transaction Coordinator at the same time by selecting additional check boxes. Multiple transactions cannot be transferred to a Full Access Agent.

The screenshot shows the 'Transaction Search Results' page. At the top right, it says 'Total Transactions: 3'. Below this is a table with columns: Trans #, Property Address, Status, Primary Agent, Closing/Escrow #, Principals (B or S), Estimated Closing Date, and a checkbox. The table lists three transactions. The second transaction, 6229-6432, is selected with a checked checkbox. Below the table, there are buttons for 'Print Due/Past Due Activities', 'Transfer', and 'Fax Cover'. A message at the bottom left states: '\* You have been given access to this transaction by the owner'.

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
6225-6428	2451 Montrose Ave. Montrose, CA 91020	Pending	Atkins, William	07-055-2451	(S) Durst, Amy	12/15/1907	<input type="checkbox"/>
6229-6432	175 South California Ave. Monrovia, CA 91016	Pending	Atkins, William	GL-07-6748	(B) May, George	11/18/2007	<input checked="" type="checkbox"/>
6238-6441	3871 Avenue 47 Los Angeles, CA 90041	Pending	Anderson, Karen	ABC-LA-3871-007	(S) Robertson, Edward	11/22/2007	<input type="checkbox"/>

**Note:** A transaction with an asterisk means that you have access but not ownership of that transaction; you will not be able to transfer that transaction.

2. In the **To** list, select the individual that will receive the transaction.

The screenshot shows the 'Transfer Transaction(s)' page. At the top, there are navigation links: Home, Mail, FAQ, Help, Logout. Below these are tabs: Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, Profile & Preferences. The main heading is 'Transfer Transaction(s)'. A note states: 'Note: When multiple transactions are selected, the transfer to dropdown list will only display Transaction Coordinators.' Below this, there is a 'From:' field with 'Janet Moore' and a 'To:' dropdown menu. The dropdown menu is open, showing a list of agents: '- Select -', '- Select -', 'Atkins, William (ABC Realty - Glendale Branch) \*\*', and 'Armstrong, Cynthia (ABC Realty - Eagle Rock Branch)'. Below the dropdown, there is a table with columns: Trans #, Property, Status, Primary Agent, Closing/Escrow #, Principals (B or S), Estimated Closing, and Select. The table lists one transaction, 6229-6432, which is selected with a checked checkbox. Below the table, there are buttons for 'Transfer' and 'Cancel'. A message at the bottom left states: '\*\* Full Access Agent' and '\*\*\* You do not have permission to transfer this transaction'.

Home | Mail | FAQ | Help | Logout

Transactions | Orders | Properties | Contacts & Providers | Documents | Reports | Profile & Preferences

Transfer Transaction(s)

Note: When multiple transactions are selected, the transfer to dropdown list will only display Transaction Coordinators.

From: Janet Moore

To:

Please select the transfer to:

Trans #	Property	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing	Select
6229-6432	175 South California Ave. Monrovia, CA 91016	Pending	Atkins, William	GL-07-6748	(B) May, George	11/18/2007	<input checked="" type="checkbox"/>

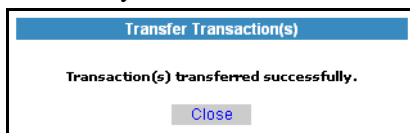
\*\* Full Access Agent  
\*\*\* You do not have permission to transfer this transaction

Transfer Cancel

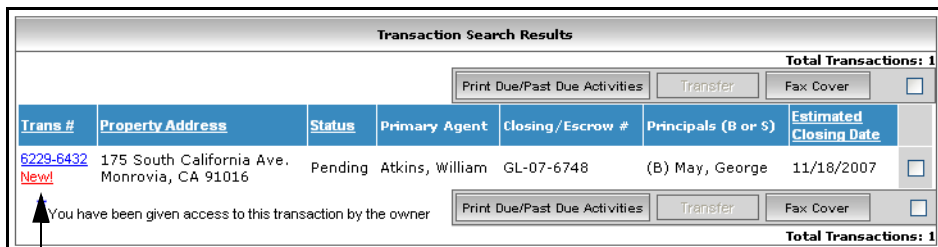
In this example, the first selection is a Full Access Agent, as noted by the asterisks. The second selection is a Transaction Coordinator.

**Note:** The list will display coordinators and agents who have access to the same branch as the transaction owner and the primary and any co-agents for the transaction.

3. Make your selection and click **Transfer**. At completion the transfer confirmation window appears.



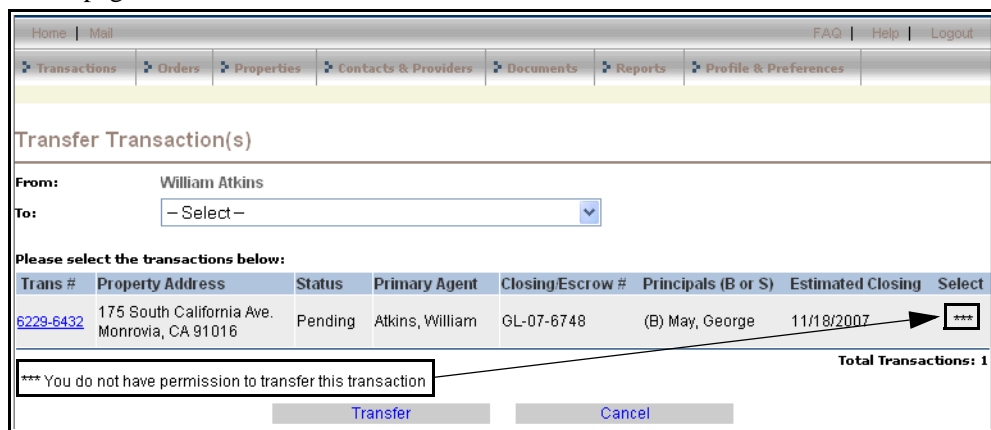
The transaction now appears in the Transaction Center of the new owner.



New indicates that this transaction was transferred to this individual. After opening the transaction New no longer appears.

## Transfer Denied

If you do not own a transaction and attempt to transfer it, the following appears when you click **Transfer** on the Transaction Center page:



Click **Cancel** to return to the Transaction Center page.

# Assisting a Transaction Coordinator

The **Assist a TC** function allows you to work transactions owned by another transaction coordinator if you have that transaction coordinator's **Assist a TC** password.

---

**Note:** To assist a transaction coordinator, you must have access to the branch of the transaction coordinator you are helping.

---

1. Click **Transactions** tab.
2. Click **Transaction Center**. The **Transaction Center** page appears.
3. Click **Assist a TC**. The **Assist a TC** page appears.

The screenshot shows the 'Transaction Center' page. At the top, there is a navigation bar with tabs: Home, Mail, Transactions (selected), Orders, Properties, Contacts & Providers, Documents, Reports, and Profile & Preferences. Below the navigation bar, the 'Transaction Center' section contains a 'Submit a New Transaction' button and a 'Create Transaction' button. An arrow points from the 'Assist a TC' button, which is highlighted with a red box, to the 'Assist a TC' button. Below this, there is a 'Transaction Coordinator: Moore, Janet' section with a 'Save Settings' button. The 'Branch' is set to 'ABC Realty - Glendale Branch'. The 'Agent' is set to '(\* InActive Agents)'. The 'Agent Represents' is set to 'Show All'. The 'Status' is set to 'Pending'. The 'With' is set to 'Show All'. There is an 'Other Filters' section with a 'Property Address' dropdown and a 'Search' button. Below the search section, there is a 'Transaction Search Results' section. It shows a table with 2 transactions. The table has columns: Trans #, Property Address, Status, Primary Agent, Closing/Escrow #, Principals (B or S), and Estimated Closing Date. The first transaction is 6229-6432, 175 South California Ave. Monrovia, CA 91016, Pending, Atkins, William, GL-07-6748, (B) May, George, 11/18/2007. The second transaction is 6225-6426, 2451 Montrose Ave. Montrose, CA 91020, Pending, Atkins, William, 07-055-2451, (S) Durst, Amy, 12/05/2007. Below the table, there is a message: 'You have been given access to this transaction by the owner'. There are also buttons for 'Print Due/Past Due Activities', 'Transfer', and 'Fax Cover'.

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date
6229-6432	175 South California Ave. Monrovia, CA 91016	Pending	Atkins, William	GL-07-6748	(B) May, George	11/18/2007
6225-6426	2451 Montrose Ave. Montrose, CA 91020	Pending	Atkins, William	07-055-2451	(S) Durst, Amy	12/05/2007

4. Select the **Transaction Coordinator** from the list.

The screenshot shows the 'Assist a TC' page. It has a 'Transaction Coordinator' dropdown menu with 'Moore, Janet (ABC Realty - Glendale Branch)' selected. Below it is a 'Password' field with four dots. At the bottom, there are 'Submit' and 'Cancel' buttons.

5. Enter the Assist a TC **Password**.
6. Click **Submit**.

7. The **Transaction Center** updates to show the new transaction coordinator and their respective transactions.

Home | Mail FAQ | Help | Logout

Transactions Orders Properties Contacts & Providers Documents Reports Profile & Preferences

---

### Transaction Center

**Submit a New Transaction:**

**Transaction Coordinator:** **Moore, Janet**

**Branch:**  **Agent:** (\* InActive Agents)

**Agent Represents:**  **Status:**  **With:**

**Other Filters:**

---

### Transaction Search Results

☐

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">6229-6432</a>	175 South California Ave. Monrovia, CA 91016	Pending	Atkins, William	GL-07-6748	(B) May, George	11/18/2007	<input type="checkbox"/>
<a href="#">6225-6428</a>	2451 Montrose Ave. Montrose, CA 91020	Pending	Atkins, William	07-055-2451	(S) Durst, Amy	12/05/2007	<input type="checkbox"/>

\* You have been given access to this transaction by the owner

   ☐

**Total Transactions: 2**

**Total Transactions: 2**

---

User: Cynthia Armstrong v12.2 Copyright © 2002 Site Name: gphicome

In this example the transaction coordinator owing these transactions is Janet Moore (displayed in red) and the assisting coordinator is Cynthia Armstrong.

---

**Note:** Whenever an assisting transaction coordinator acts on behalf of another coordinator the Communication Log adds the name of the assisting transaction coordinator. Also, when preparing a fax cover sheet, the name of the assisting coordinator appears in the information section of the cover sheet.

---

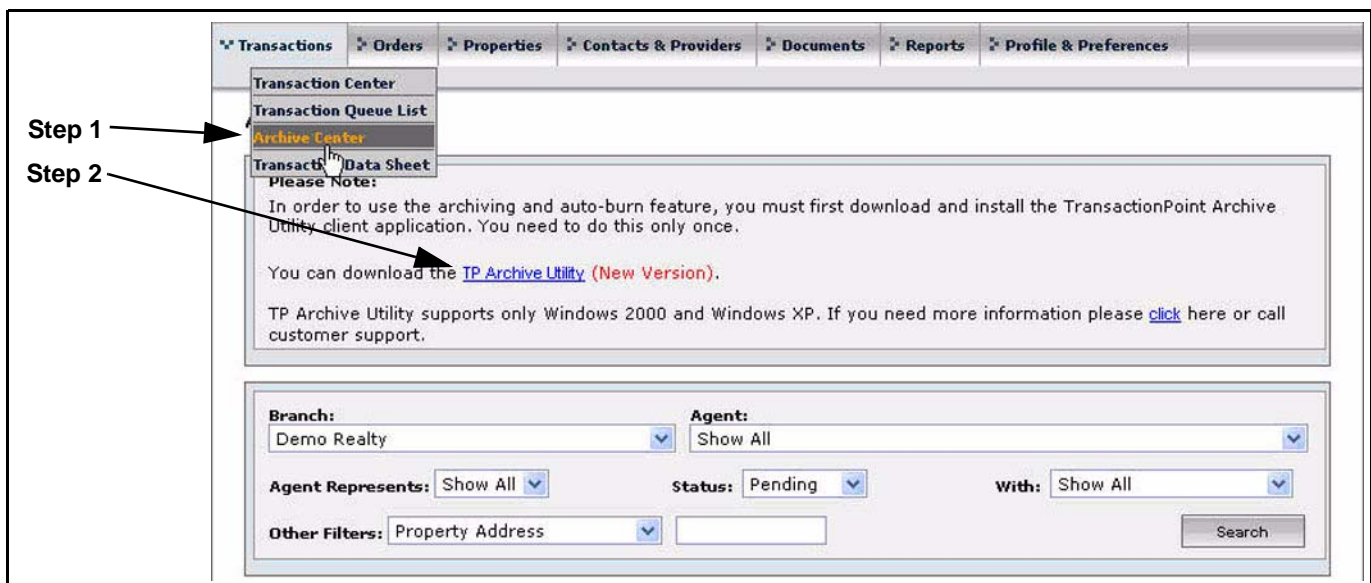
# Archive Center

The Archive Center allows you to download transactions, archive them to your computer, and/or burn them to a Compact Disk. The files are saved as a readable .PDF file. You can then provide the file to agents and clients. Before you can use Archive Center, you must download the TransactionPoint Archive client application.

## Downloading and Installing the Archive Utility

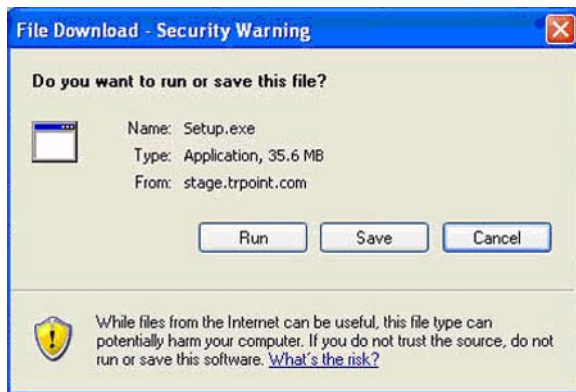
**Note:** If you have not installed the current TP Archive Utility, follow the steps below to install or update the software. This must be done before you burn CDs.

1. Go to your Transaction Point website and login. Go to the super tabs at the top of the page and hover your mouse over **Transactions**. Click on **Archive Center**.

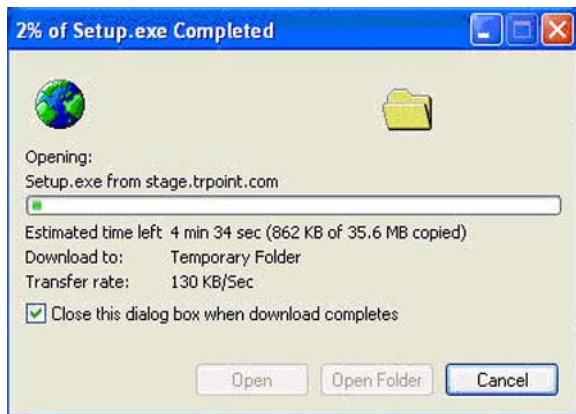


2. In the Archive Center, click on the link: **TP Archive Utility** to download the software.

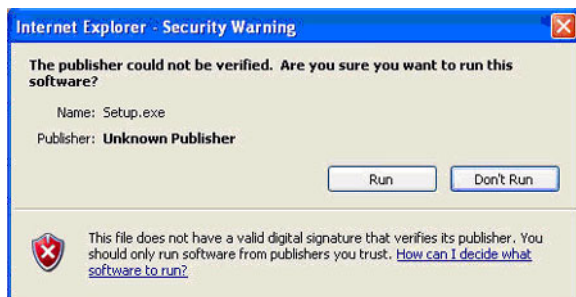
3. Click on **Run** in the window shown below:



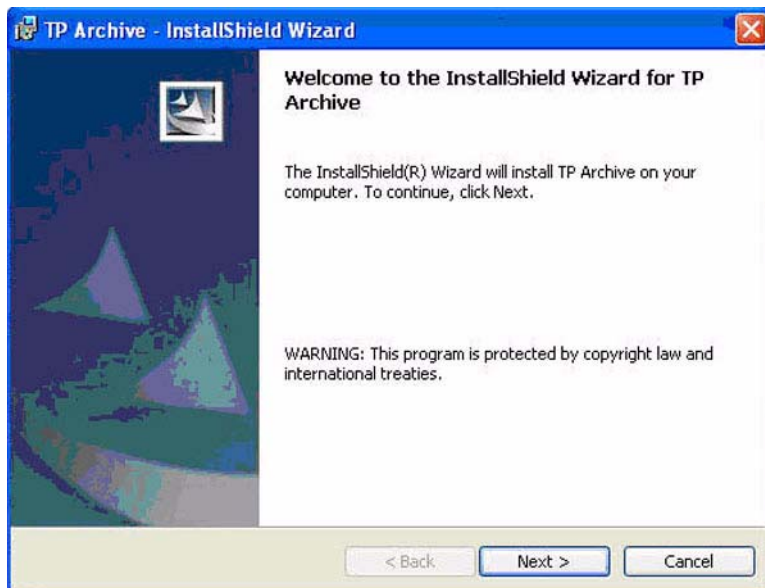
The screen below is shown to indicate that the software is installing on your computer:



4. Click **Run** in the Security Warning window (shown below) that pops up.



5. Click **Next** in the TP Archive-InstallShield Wizard window (shown below) that pops up.

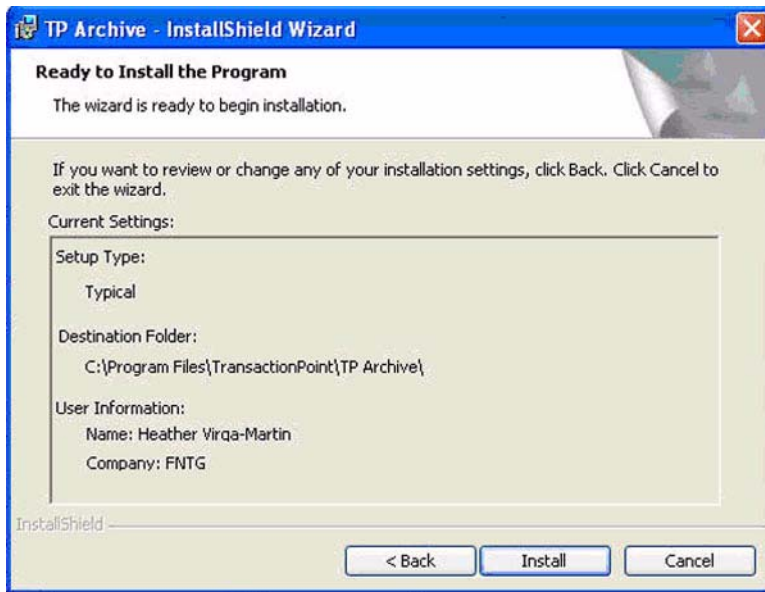


6. Type your name and company name, select **Anyone who uses this computer (all users)**, and click **Next**.

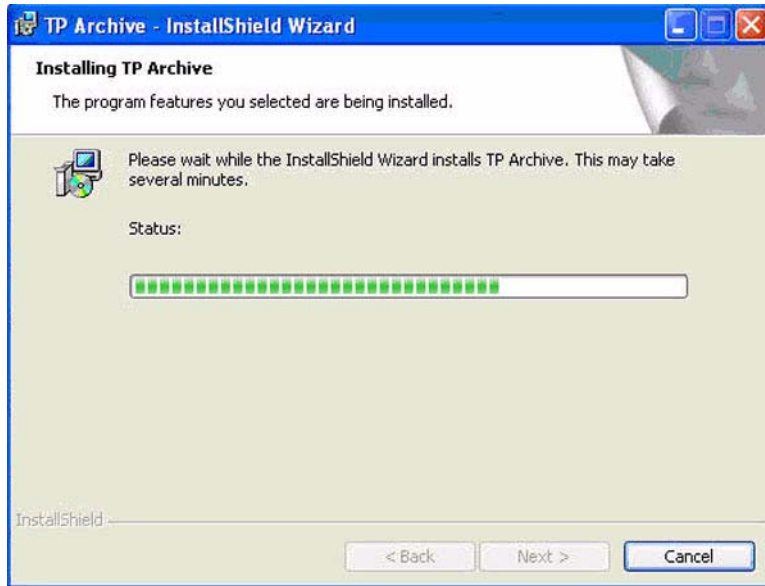
The image shows the same "TP Archive - InstallShield Wizard" window, but now on the "Customer Information" screen. The title bar and close button are the same. The left panel now shows a document icon. The main area is white and contains the following text: "Customer Information", "Please enter your information.", "User Name:" followed by a text input field, "Organization:" followed by a text input field, "Install this application for:", and two radio button options: "Anyone who uses this computer (all users)" (which is selected) and "Only for me ( )". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".



7. Click **Install**.

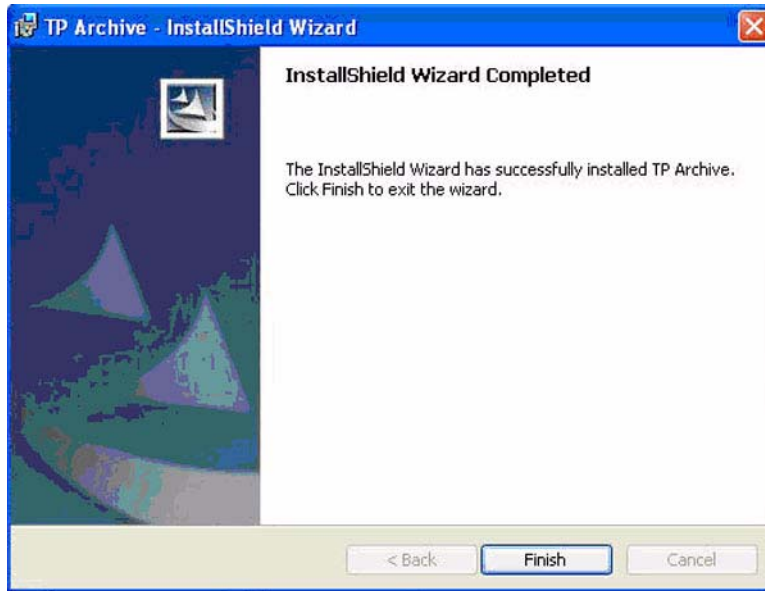


The **Installing TP Archive** window appears.



8. When the **InstallShield Wizard Completed** window appears, click **Finish**.

You are now ready to archive transactions.



# Archiving Transactions

**Note:** Before writing the CD, the TP Archive utility ensures that there is enough room on the CD. If there is not enough room, a warning appears.

1. To archive a transaction, go to the Archive Center and select transaction(s) by clicking the box to the left of the property address.

The screenshot shows a window titled "Transaction Search Results". At the top, there is a dropdown menu for "Archive Type" set to "Full" and an "Archive" button. Below this is a table with the following data:

	Trans No.	Property Address	Status
<input type="checkbox"/>	27643-26957	888 Kapiolani, Honolulu, HI 96821	Pending

At the bottom right of the window, it says "Total Transactions : 1".

2. Select the type of archive you wish to execute:

**Full** - Allows you to archive the entire file, including the communications log and private and public documents, for the Broker's or Agent's records.

**Public** - Allows you to archive a limited view of the file (no communications log or private documents) to be given to participants in the transaction.

**Custom** - Allows you to archive a customized list of documents and activities. Customized archive is available when you upload documents directly to TransactionPoint or fax documents into TransactionPoint using the fax cover sheet. This feature can also be made available using defaults set in the Activities section by the Site Administrator. Additionally, you may archive multiple transactions at one time by selecting the check boxes to the left of the transaction address.

**Buyer** - Allows you to archive all buyer documents.

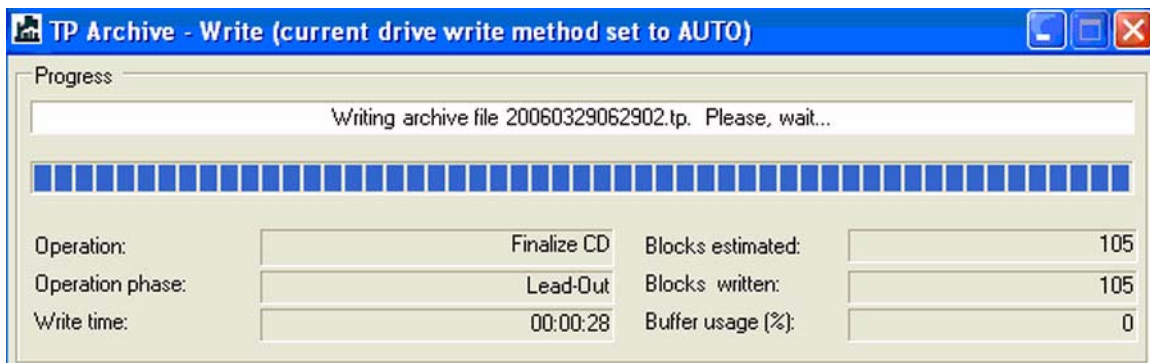
**Seller** - Allows you to archive all seller documents.

3. Insert a blank CD.

**Note:** If this window appears, click **Cancel**.



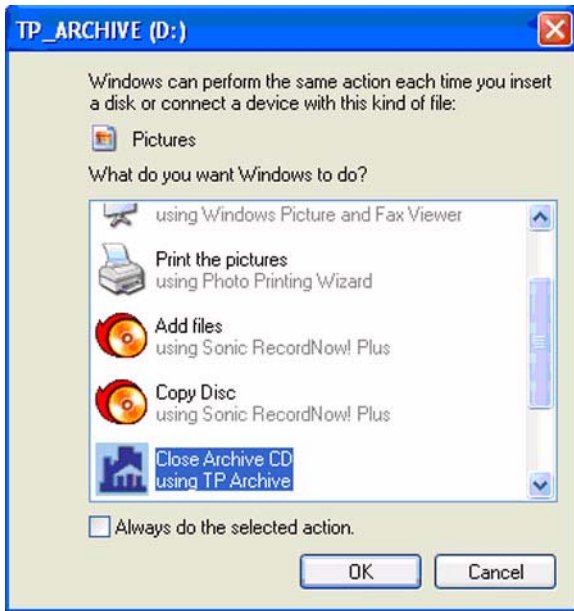
4. Click **Open**. The TP Archive Write window appears.



5. Click **Yes** to reload the CD.



6. Choose **Close Archive CD using TP Archive**.



7. Click **OK**.
8. Click **Yes** to confirm your choice to close the CD.



9. To view the CD, close the CD drawer. The CD launches automatically.

## Opening an Archive .PDF File

1. Insert the CD into your CD-ROM drive. The TP Archive Center page appears with a hyperlink for each address on the CD.
2. Click the address you want to view. The **Property Information** page appears.

3. Click **Transaction Summary Report**.

Transaction Summary Report

956 Hao Street  
Honolulu HI USA

Agent Information:  
Ann Agent  
(Represents Seller)  
East Office  
Santa Ana, CA 92705  
808-808-8080 (Work)  
annagent@transactionpoint.com

Archived on 9/14/2005 4:47:56 PM (PDT)

You can now print the summary.

## Customizing Archive Options

### Including a Document Using a Fax Cover Sheet

This feature is available in TransactionPoint anywhere that you can create a fax cover sheet. Once you choose to create a fax cover sheet, the following Fax Cover Sheet page appears. Check the **Include in Customized Archive** box; the faxed documents will be included on the Customized Archive CD you create in the Archive Center.


TransactionPoint Fax Cover Sheet					
Trans #	Property Address	Activity	File Name	Remove Cover Sheet	Include in Customized Archive
27217-26541	1234 Test Drive, San Jose, CA 95132	HOA Package Received & To Buyer for Approval	<input type="text" value="HOA Package Received"/>	<input type="checkbox"/>	<input type="checkbox"/>
27217-26541	1234 Test Drive, San Jose, CA 95132	Appraisal Ordered	<input type="text" value="Appraisal"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Including a Document Using the Upload Feature

**Note:** Documents can be split and renamed as multiple PDF files after uploading. See *Splitting a Document into Multiple Documents* on page 93.

You can include a document in your Customized Archive when you upload the document directly from your computer.

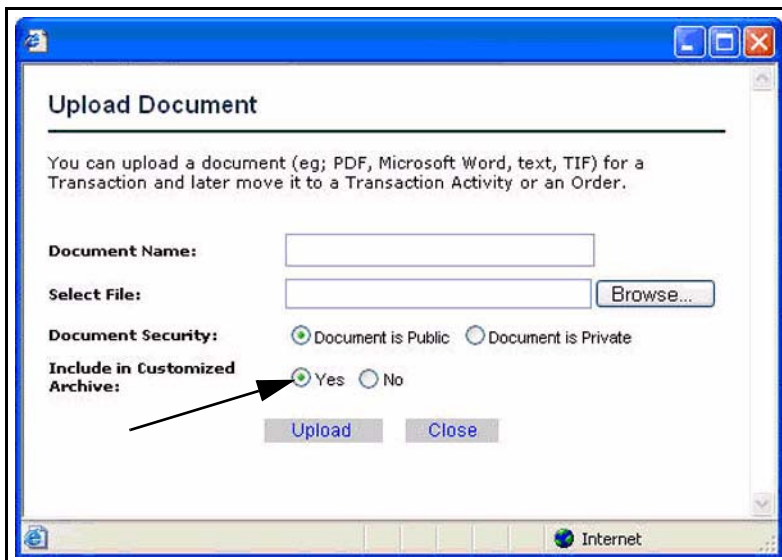
1. In the Transaction Documents window, click on **Upload Document**.



The screenshot shows the 'Transaction Documents' window. At the top, it displays 'Transaction ID: 27217-26541' and the address '1234 Test Drive, San Jose, CA 95132'. Below this is a toolbar with buttons: 'Mail', 'Move', 'Rename', 'Remove', and 'Upload Document'. An arrow points to the 'Upload Document' button. Below the toolbar is a table with columns: 'Select', 'Name', 'Approved Type', 'Status', 'Tracking#', 'Upload Date', 'Log', and 'Privilege'. The table contains five rows of transaction documents, each with a checkbox in the 'Select' column and icons in the 'Log' and 'Privilege' columns. At the bottom of the window, there is another set of buttons: 'Mail', 'Move', 'Rename', 'Remove', and 'Upload Document'.

Select	Name	Approved Type	Status	Tracking#	Upload Date	Log	Privilege
<input type="checkbox"/>	Agency Disclosure	Seller	Pending	27217-26541	3/16/2006 4:19:56 PM (PST)		
<input type="checkbox"/>	HOA Package	Seller	Pending	27217-26541	3/14/2006 9:40:34 AM (PST)		
<input type="checkbox"/>	Home Warranty	Seller	Pending	27217-26541	3/14/2006 10:26:19 AM (PST)		
<input type="checkbox"/>	sds	Seller	Pending	27217-26541	3/13/2006 2:15:22 PM (PST)		
<input type="checkbox"/>	test	Seller	Pending	27217-26541	3/13/2006 3:42:42 PM (PST)		

The Upload Document window appears:



The screenshot shows the 'Upload Document' window. It has a title bar with standard window controls. The main content area contains the following fields and options:

- Document Name:** A text input field.
- Select File:** A text input field with a 'Browse...' button next to it.
- Document Security:** Two radio buttons: 'Document is Public' (selected) and 'Document is Private'.
- Include in Customized Archive:** Two radio buttons: 'Yes' (selected) and 'No'. An arrow points to the 'Yes' button.
- Buttons:** 'Upload' and 'Close' buttons at the bottom.

The window title is 'Upload Document'.

2. Click **Yes** next to **Include in Customized Archive**.

# Order Center

Use the **Order Center** to view the details of an individual order, make changes to an order, change the status of an order, create a fax cover sheet, or remove an order associated with a property.

1. Click the **Orders** tab.
2. Click **Existing Order Search**. The **Order Center** page appears.

The screenshot shows the 'Order Center' page with a navigation bar at the top containing links for Home, Mail, Calendar, FAQ, Help, and Logout. Below the navigation bar is a tabbed interface with tabs for Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, and Profile & Preferences. The 'Orders' tab is active, and within it, the 'Existing Order Search' sub-tab is selected. Below the tabs, there is a section titled 'ORDER CENTE' with a 'Batch Order Search' button. A message states: 'To see ALL orders, click on the pull-down next to "Status" and select "Show All"'. Below this message are search filters: 'Branch' (set to 'East Office'), 'Agent' (set to 'Mary Moore'), 'Status' (set to '- Show All -'), and 'Search By' (set to 'Address'). A 'Search' button is next to the search field. Below the filters is a table with columns: Order ID, Type, Provider, Order Placed, Status, Status Last Changed, and a 'Remove' button. The table lists three orders for Agent Mary Moore: 2709-5185 (Natural Hazard Disclosure, John Walker, 7/5/2005, Order Placed, 10:18:13 AM (PDT)), 2708-5184 (Closing, Joe Lender, 7/5/2005, Order Placed, 10:18:08 AM (PDT)), and 2707-5183 (Appraisal, Rainer Oster, 7/5/2005, Order Placed, 10:18:02 AM (PDT)). Each order has a 'Remove' button next to it.

Order ID	Type	Provider	Order Placed	Status	Status Last Changed	
<b>Agent: Mary Moore</b>						
Transaction 3696-3924 for 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765 <a href="#">Transaction Order Summary</a>						
<a href="#">2709-5185</a>	Natural Hazard Disclosure	John Walker	7/5/2005 10:18:13 AM (PDT)	Order Placed	7/5/2005 10:18:13 AM (PDT)	<a href="#">Remove</a>
<a href="#">2708-5184</a>	Closing	Joe Lender	7/5/2005 10:18:08 AM (PDT)	Order Placed	7/5/2005 10:18:08 AM (PDT)	<a href="#">Remove</a>
<a href="#">2707-5183</a>	Appraisal	Rainer Oster	7/5/2005 10:18:02 AM (PDT)	Order Placed	7/5/2005 10:18:02 AM (PDT)	<a href="#">Remove</a>

From the Order Center, you can work with individual orders or remove an order if the status is **Order Placed**.

## Viewing Orders

1. Select the **Branch**.
2. Select the **Agent**.
3. Select the **Status** of the orders you want to view.

The screenshot shows a dropdown menu for the 'Status' filter. The menu is open, showing a list of options: 'Order Placed Between...', '- Show All -', 'Active Orders (Order Placed/Accepted/Rescheduled)', 'Order Accepted', 'Order Cancelled', 'Order Completed', 'Order Placed', and 'Order Rescheduled'. The '- Show All -' option is currently selected and highlighted in blue.

4. Enter the start and end dates if you selected **Order Placed Between**.
5. Select the **Search By** option to search for orders by **Address, City, State, Zip, Order #**, or **Type**.
6. Enter at least two characters in the **Search By** field.



**Note:** The search criteria is **not** case sensitive. Blank characters are meaningful. For example, the entry “123 ma” (with 2 blanks between the 3 and m) is different than the entry “123 ma” (with 1 blank between the 3 and m). Your search can fail if you have extra blank characters.

7. Click **Search**. The **Order Center** page refreshes to show the results of the search.

## Understanding Order Details

1. Click the **Order ID** for the selected property. The **Order Details** page appears.

Home   Mail		Calendar   FAQ   Help   Logout				
Transactions	Orders	Properties	Contacts & Providers	Documents	Reports	Profile & Preferences
Order Details	Change Status	Comments	Documents	Edit Order		
Order Details <a href="#">Back to Order Center</a>						
Order #:	2708-5184	Transaction #:	3696-3924			
Property Address:	23617 Golden Springs Dr K-17, Diamond Bar, CA 91765		Service Type:	Closing (Open Closing)		
Order Status:	Order Placed		Order Date:	7/5/2005 10:18:08 AM (PDT)		
Property Information						
Property Address: 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765						
APN #: 640D6						
Map Book / Code: 640D6 Cross Street: ?						
Brief Directions:						
Property Details						
Property Type: Townhouse						
Property Area: 768 sq. ft.						
Property Includes:						
Power is: OFF						
Approx. Age: 31						
Property is: Owner Occupied						
Service Ordered						
Service: Closing (Open Closing)						
Service Provider: Joe Lender						
Company Name: First Lender						
Address: 111 Fake Ave						
City: Diamond Bar State: CA Zip: 91765						
Phone: Fax: Pager:						
Cell Phone:						
Email: joe_lender@transactionpoint.com						
Client:						
Ordered For: Seller Order Date: 7/5/2005 10:18:08 AM (PDT)						
Agent: Mary Moore Order Placed By: Karen Jones						
Status: Order Placed						

### Top Section of the Order Detail Page

The top section of the **Order Detail** page is where you select the actions to be performed on an order. These actions are:

- Change status
- Add comments
- Upload documents
- Edit the order

Also the **Order Detail** page displays detailed property information.

## Middle Section of Order Detail Page

Agent Information			
<b>Buyer's Agent</b>			
<b>Name:</b>	John Test NS VORLTR 34		
<b>Company:</b>	John Test New Server		
<b>Address:</b>	2510 Redhill Santa Ana CA 92705 USA		
<b>Work Phone:</b>	1234567890	<b>Cell Phone:</b>	1234567890
<b>Fax:</b>	1234567890	<b>Pager:</b>	1234567890
<b>Email:</b>	raphael.zarate@tnf.com		
<b>Seller's Agent</b>			
<b>Name:</b>	Mary Moore		
<b>Company:</b>	East Office		
<b>Address:</b>	2510 Redhill		
<b>City:</b>	Santa Ana	<b>State:</b>	CA <b>Zip:</b> 92705
<b>Country:</b>	USA		
<b>Work Phone:</b>	999-999-9999	<b>Cell Phone:</b>	
<b>Fax:</b>		<b>Pager:</b>	
<b>Email:</b>	mmoore@transactionpoint.com		
<b>Transaction Coordinator Information</b>			
<b>Name:</b>	Karen Jones		
<b>Company:</b>	East Office		
<b>Address:</b>	2510 Redhill		
<b>City:</b>	Santa Ana	<b>State:</b>	CA <b>Zip:</b> 92705
<b>Country:</b>	USA		
<b>Work Phone:</b>	777-222-4015	<b>Cell Phone:</b>	
<b>Fax:</b>	7775553015	<b>Pager:</b>	
<b>Email:</b>	kjones@transactionpoint.com		
<b>Clients</b>			
<b>Buyer</b>			
Buyer's Details Not Entered			
<b>Seller</b>			
Seller's Details Not Entered			
<b>Status History and Comments</b>			
<b>Date</b>	<b>Status</b>	<b>Entered By</b>	<b>Comments</b>
7/5/2005 10:18:08 AM (PDT)	Order Placed	Karen Jones	

The middle section of the **Order Detail** displays:

- Details about the service order
- Information about the agent
- Information on the Transaction Coordinator
- Information about the client
- Status history and comments

## Bottom Section of Order Detail Page

Notification of Status Changes and Order Documents			
	Send?	Send By	
Buyer:	No		
Seller:	No		
Buyer's Agent:	No		
Seller's Agent:	No		
Closing:	No		
TC:	No		
Closing Order Details			
Type of Title Insurance Coverage:			
Status of Sale:			
Sale Transaction Information			
Sales Price:			
Sale Date:		COE Date:	
Deposit:		Due Date:	
Increase Deposit:		Due Date:	
Commission To			
Buyer's Agent:		Seller's Agent:	
Referral Fee Due:	No		
Agent Name:		Company:	
Address:			
City:		State:	Zip:
Amount:	% of		
Other Info regarding the Transaction:			
Will power of Attorney used during transaction:		No	
Will Buyer's Fund be Send to Another Company:		No	
Will Seller's Fund be Send to Another Company:		No	
Comments to Closing officer regarding this Transaction:			
Home Owner Association Information			
Is Property Part of Home Owner Association?	No		
<a href="#">Back</a>			
<a href="#">Back to Order Center</a>			

The bottom section of the **Order Detail** page displays:

- Notice of status changes and order documents
- Closing order details
- Sale transaction information
- Home owners association information

## Changing Order Status

1. Click **Change Status** on the **Order Detail** page.

Order Details	Change Status	Comments	Documents	Edit Order
<a href="#">Back to Order Center</a>				
<b>Order Details</b>				
Order #:	2708-5184	Transaction #:	3696-3924	
Property Address:	23617 Golden Springs Dr K-17, Diamond Bar, CA 91765		Service Type:	Closing (Open Closing)
Order Status:	Order Placed	Order Date:	7/5/2005 10:18:08 AM (PDT)	

The **Change Order Status** page appears.

Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders Properties Contacts & Providers Documents Reports Profile & Preferences

Order Details **Change Status** Comments Documents Edit Order

**Change Order Status** [Back to Order Center](#)

Order #: [2708-5184](#)  
Property Address: 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765  
Order Status: Order Placed  
Service Type: Escrow  
Order Date: 7/5/2005 10:18:08 AM (PDT)

After selecting a new status, add comments in the "Add Comments" field. Click the "Change Status" button.

**Change Status**

Current Status: Order Placed  
New Status: -Select New Status-  
Comments:   
[Change Status](#)

**Status History and Comments**

Date	Status	Entered By	Comments
7/5/2005 10:18:08 AM (PDT)	Order Placed	Karen Jones	

[Back to Order Center](#)

2. Select the **New Status**.
3. Add **Comments** to explain the reason for the status change.
4. Click **Change Status**.

If you use the **Change Status** to cancel an order, an **Order Cancellation** page appears. Click **Yes** to confirm the order cancellation.

## Adding Order Comments

1. Click **Comments** on the **Order Details** page.

Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders Properties Contacts & Providers Documents Reports Profile & Preferences

Order Details **Change Status** Comments Documents Edit Order

**Order Details** [Back to Order Center](#)

Order #: [2708-5184](#)  
Property Address: 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765  
Order Status: Order Placed  
Transaction #: [3696-3924](#)  
Service Type: Closing (Open Closing)  
Order Date: 7/5/2005 10:18:08 AM (PDT)

The **Order Status History** page appears.

Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders Properties Contacts & Providers Documents Reports Profile & Preferences

Order Details Change Status **Comments** Documents Edit Order

### Order Status History [Back to Order Center](#)

**Order #:** [2708-5184](#)  
**Property Address:** 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765  
**Order Status:** Order Placed  
**Service Type:** Escrow  
**Order Date:** 7/5/2005 10:18:08 AM (PDT)

Add comments in the "Comments" field and click the "Insert Log Comment" button.

**Add Comments**

**Current Status:** Order Placed

**Comments:**

[Log Comment](#)

Status History and Comments			
Date	Status	Entered By	Comments
7/5/2005 10:18:08 AM (PDT)	Order Placed	Karen Jones	

[Back to Order Center](#)

2. Enter the **Comments**.
3. Click **Log Comment**. The **Order Status History** page updates and displays the new comment.

## Uploading Documents From Your Hard Drive

1. Select **Documents** on the **Order Details** Page.

Order Details Change Status Comments **Documents** Edit Order

### Order Details [Back to Order Center](#)

**Order #:** [2708-5184](#)  
**Property Address:** 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765  
**Order Status:** Order Placed  
**Transaction #:** [3696-3924](#)  
**Service Type:** Closing (Open Closing)  
**Order Date:** 7/5/2005 10:18:08 AM (PDT)

The **Order Documents** page appears.

Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders Properties Contacts & Providers Documents Reports Profile & Preferences

Order Details Change Status Comments Documents Edit Order

### Order Documents Back to Order Center

Order #: [2708-5184](#)  
Property Address: 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765  
Order Status: Order Placed  
Service Type: Escrow  
Order Date: 7/5/2005 10:18:08 AM (PDT)

- Select Newly Arrived Documents to move to the current order, or upload a document to the current order.
- Manage Existing Order Documents: view, mail, move, change access privileges or view access history.

#### Newly Arrived Documents

Document Name	Date
<input type="checkbox"/> <a href="#">Profile.pdf</a>	8/3/2005 5:55:01 PM (PDT)

Move Remove

#### Upload Documents

Document Name:

Select File:  Browse...

Comments:

Upload

#### Existing Order Documents

Document Name	Tracking#	Upload Date	History	Privilege
---------------	-----------	-------------	---------	-----------

Back to Order Center

2. Type a **Document Name**.
3. Click **Browse** to search for the document.
4. Double-click on the name of the document you wish to upload.
5. Select **Document Security**, and indicate whether this document should be included in the customized archive.
6. Type any **Comments**.
7. Click **Upload**. The document is uploaded and appears in the **Order Document** page.

If you entered any comments to be associated with the uploaded document, they are logged in the **Status History and Comments** section of the **Order Status History** page.

8. Click **Back to Order Center** after you have uploaded all documents for the property.

## Editing an Order

1. Click **Edit Order** on the **Order Details** page. The **Edit Order Detail** page appears.

Order Details Change Status Comments Documents Edit Order

### Order Details Back to Order Center

Order #: [2708-5184](#)  
Property Address: 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765  
Order Status: Order Placed  
Transaction #: [3696-3924](#)  
Service Type: Closing (Open Closing)  
Order Date: 7/5/2005 10:18:08 AM (PDT)

2. Make the necessary changes.
3. Click **Submit**.

# Viewing a Transaction Order Summary

1. Click the **Orders** tab.
2. Click **Existing Order Search**. The **Order Center** page appears.

[Home](#) | [Mail](#) [Calendar](#) | [FAQ](#) | [Help](#) | [Logout](#)

[Transactions](#) | **[Orders](#)** | [Properties](#) | [Contacts & Providers](#) | [Documents](#) | [Reports](#) | [Profile & Preferences](#)

[Existing Order Search](#)  
[Batch Order Search](#)

**ORDER CENTE**

To see ALL orders, click on the pull-down next to "Status" and select "Show All"

Branch:

Agent:

Status:

Search By:

Order ID	Type	Provider	Order Placed	Status	Status Last Changed	
<b>Agent: Mary Moore</b>						
Transaction 3696-3924 for 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765				<a href="#">Transaction Order Summary</a>		
<a href="#">2709-5185</a>	Natural Hazard Disclosure	John Walker	7/5/2005 10:18:13 AM (PDT)	Order Placed	7/5/2005 10:18:13 AM (PDT)	<input type="button" value="Remove"/>
<a href="#">2708-5184</a>	Closing	Joe Lender	7/5/2005 10:18:08 AM (PDT)	Order Placed	7/5/2005 10:18:08 AM (PDT)	<input type="button" value="Remove"/>
<a href="#">2707-5183</a>	Appraisal	Rainer Oster	7/5/2005 10:18:02 AM (PDT)	Order Placed	7/5/2005 10:18:02 AM (PDT)	<input type="button" value="Remove"/>

3. Click **Transaction Order Summary**.

The **Transaction Order Summary** screen appears.

Transaction Order Summary				
Transaction 4507-4719 for 9000 Amber Downs Drive , McKinney, TX 75070				<a href="#">Back</a>
<p>The progress of each order placed for this transaction is displayed here for a quick overview. Also available are the details of each order. Please click on the links below for information on the order.</p>				
INSPECTION				
	Order Placed	Order Accepted	Order Cancelled	Order Completed
Appliance				
Asbestos Inspection				
Chimney Inspection				
Electrical				
Foundation Inspection				
Geo/Tech Inspection				
Heat/Air Inspection				
Home Inspection				
<a href="#">2974-5461</a>	2/1/2006	2/14/2006		
<a href="#">3162-5649</a>	5/1/2006	5/8/2006		
<a href="#">3176-5663</a>	5/17/2006			
Lead/Paint Inspection				
<a href="#">3154-5641</a>	4/27/2006			
Miscellaneous Inspection				
Mold Inspection				
Pest Control Inspection				
Plumbing Inspection				
Pool/spa Inspection				
Radon Inspection				
Roof Inspection				
Security/Alarm Inspection				
Septic Inspection				
Soil Inspection				
Solar Inspection				
Structural Engineer				
Surveyor				
Trees Inspection				
Water Analysis				
Well Inspection				

CLOSING				
	Order Placed	Order Accepted	Order Cancelled	Order Completed
Escrow				
Title				
Warranty Deed				

OTHER SERVICES				
	Order Placed	Order Accepted	Order Cancelled	Order Completed
Appraisal				
<a href="#">3087-5574</a>	3/13/2006	3/14/2006		3/24/2006
Credit				
Flood				
Home Services				
Home Warranty				
<a href="#">3155-5642</a>	4/27/2006			
Insurance				
Loan (Document)				
Loans/Mortgage				
Natural Hazard Disclosure				
Professional Services				

Click on an order to view its detail information. The **Order Details** screen appears.

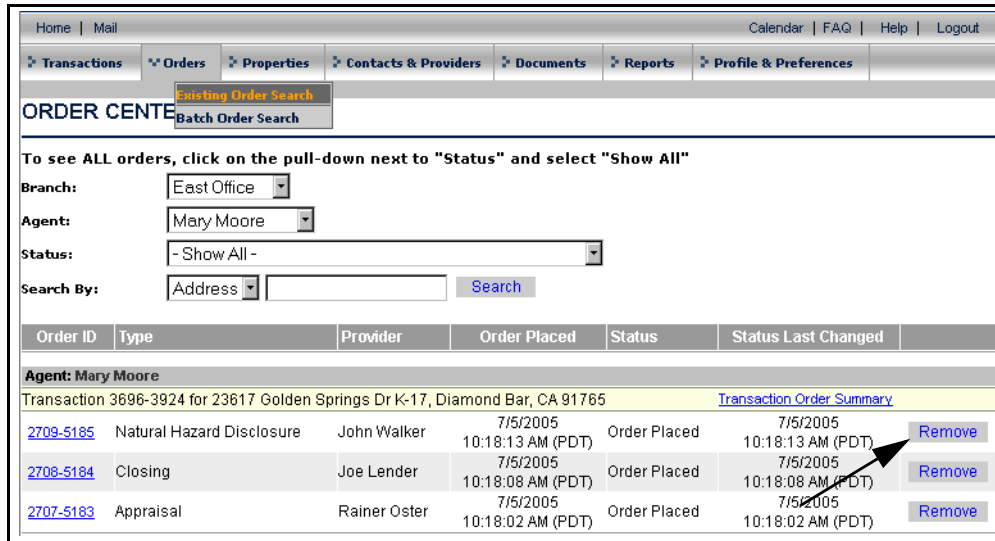
- Click **Back** to return to the Order Center.



# Removing an Order

Use the **Order Center** to remove an order associated with a property when the order status is **Order Placed**.

1. Click the **Orders** tab.
2. Click **Existing Order Search**. The **Order Center** page appears.



The screenshot shows the 'ORDER CENTER' page with search filters and a table of orders. The filters include Branch (East Office), Agent (Mary Moore), Status (- Show All -), and Search By (Address). The table lists three orders: 2709-5185 (Natural Hazard Disclosure), 2708-5184 (Closing), and 2707-5183 (Appraisal). Each order has a 'Remove' button next to it. An arrow points to the 'Remove' button for order 2708-5184.

Order ID	Type	Provider	Order Placed	Status	Status Last Changed	
<b>Agent: Mary Moore</b>						
Transaction 3696-3924 for 23617 Golden Springs Dr K-17, Diamond Bar, CA 91765 <a href="#">Transaction Order Summary</a>						
<a href="#">2709-5185</a>	Natural Hazard Disclosure	John Walker	7/5/2005 10:18:13 AM (PDT)	Order Placed	7/5/2005 10:18:13 AM (PDT)	<a href="#">Remove</a>
<a href="#">2708-5184</a>	Closing	Joe Lender	7/5/2005 10:18:08 AM (PDT)	Order Placed	7/5/2005 10:18:08 AM (PDT)	<a href="#">Remove</a>
<a href="#">2707-5183</a>	Appraisal	Rainer Oster	7/5/2005 10:18:02 AM (PDT)	Order Placed	7/5/2005 10:18:02 AM (PDT)	<a href="#">Remove</a>

3. Click **Remove** to the right of the order to be removed. A warning page appears.
4. Click **Yes**. The **Order Center** page reappears showing that the order has been removed.

# Property Center

In the **Property Center**, you can add properties, modify property information, associate clients with properties, and create transactions for properties.

The first step in using TransactionPoint is to add a new property. You can then associate clients with the new property.

## Adding a New Property

1. Click **Properties**. The **Property Center** page appears.

Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders **Properties** Contacts & Providers Documents Reports Profile & Preferences

**PROPERTY CENTER** Active Closed

Branch: East Office

Agent: Mary Moore

Search by: Address

Property Id	Property Address	
Agent: Mary Moore		
<a href="#">P9718-3649</a>	111 Fake St, Diamond Bar, CA 91765	<a href="#">Transaction List</a> <a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P9718-3637</a>	21312 asdfsadf, santa ana, CA 91765	<a href="#">Transaction List</a> <a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P9718-3696</a>	23617 Golden Springs Dr K-17, Diamond Bar, CA 91765	<a href="#">Transaction List</a> <a href="#">New Transaction</a> <a href="#">Remove</a>

Properties 1-3 of 3

2. Select the **Branch**. If you are the coordinator for a single branch, only your active branch is listed.
3. Select the **Agent**. The page refreshes to show the properties associated with the selected agent.
4. Click **Add Property** at the bottom of the page.

The **Add Property** page appears.

<a href="#">Home</a>   <a href="#">Mail</a>	<a href="#">Calendar</a>   <a href="#">FAQ</a>   <a href="#">Help</a>   <a href="#">Logout</a>
<a href="#">Transactions</a>   <a href="#">Orders</a>   <a href="#">Properties</a>   <a href="#">Contacts &amp; Providers</a>   <a href="#">Documents</a>   <a href="#">Reports</a>   <a href="#">Profile &amp; Preferences</a>	

## ADD PROPERTY

**Agent:** Mary Moore

---

Property Address

\* required
Search

**Address: \***

**City: \***

**State: \*** CA

**Zip: \***

**Nearest Cross Street:**

**Map Book:**

**Map Code:**

**Brief Directions:**  
*(Maximum 200 characters)*

**Property Type: \***  
Apartment

**APN #:**

**MLS Board:**  
Unknown board

**MLS Number:**

Property Specifications

**Property Type:** Apartment

**Area:**  Sq. ft.

**Property Includes (choose all that apply):**  
  
**Stories:** 1 \*  
  
☐ Basement  
☐ Crawlspace  
☐ Accessible Attic  
☐ Excessive Deferred Maintenance  
☒ Power is ON

**Detached Buildings**  
  

☐ 2 Car Garage  
☐ 3+ Car Garage  
☐ Utility Shed  
☐ Farm Building  
☐ Guest or 2nd Home

**Approx. sq. ft.**

**Property Year Built:**

**Approximate Age of property:**

**Comments on showing property:**  
*(e.g. Day sleeper, pets in yard, uncooperative tenant, etc.)*

**Property Management**

**Occupancy Status**

Property is: \* ☐ Owner Occupied ☐ Vacant ☒ Tenant Occupied

Tenant Name:

Home Phone:

Office Phone:

Tenant Comments:

---

**Home Owners Association Property**

Is property part of a Home Owner Association? \* ☐ No ☒ Yes

HOA or Complex Name:

Who manages the Association? (choose one)

☒ Professionally Managed

Property Mgt. Co:  Contact:

Address:

City:  State:  Zip:

Phone:  Fax:

Email:

☐ Self Managed

HOA Contact:  Position:

Address:

City:  State:  Zip:

Phone:  Fax:

Email:

Comments regarding HOA:

5. Complete the requested information. Required fields are marked with asterisks (\*).

6. Click **Submit**. The **Create Transaction** screen appears.

**Create Transaction?**

Property: 123 Hoa Street  
Honolulu, HI 96821

**Has been successfully added!**

Do you want to Create a Transaction for this Property?

7. Click **Yes** to create a transaction for the property, or **No** to return to the Property Center. If you click **No**, the property is created but you cannot place orders or upload documents for the property.

## Creating a Transaction

If you chose to create a transaction from the **Add Property** page, the **Transaction Summary** page appears.

[Home](#) | [Mail](#) [Calendar](#) | [FAQ](#) | [Help](#) | [Logout](#)

[Transactions](#) | [Orders](#) | [Properties](#) | [Contacts & Providers](#) | [Documents](#) | [Reports](#) | [Profile & Preferences](#)

Property Address:	Transaction ID:	Escrow/Closing No.
Listing Price: \$	Represents/Status:	Escrow/Closing:
Sales Price: \$	Contract Acceptance Date:	Estimated Closing Date:
Year Built/Approximate Age:	Seller(s):	Buyer(s):
MLS No.	Seller's Agent:	Buyer's Agent:
	APN No.	File No.

[Transaction Summary](#) | Transaction Contacts | Activities/Orders/Docs | Communications Log

Transaction Details

SaveSave/Next >

\*Agent:

East Office

- Select Agent -

(Note: Agent will represent SELLER for Dual Agency Transaction)

\*Agent Represents:

- Select -

Status:

Pending

(mm/dd/yyyy)

(mm/dd/yyyy)

Listing Date:

Listing Expiration Date:

(mm/dd/yyyy)

Contract Acceptance Date:

Days to Close:

(mm/dd/yyyy)

Estimated Closing Date:

Escrow Closing Date:

Listing Price:

Sale Price:

Loan Type:

Select Loan Type

Loan Amount:

Escrow/Closing No.

Title No.

File Number:

Property Details

\*Type:

Apartment

Yr. Built:  Age:

\*Address 1:

MLS Board 

Unknown board

Address 2:

MLS # 

MLS # Search

\*City:  \*State: 

CA

APN 

APN Search

ZIP:  -  (Additional 4 digits optional)

Property Search

+ Additional Property Details

+ Home Owners Association

SaveSave/Next >

- Enter the requested information. Required fields are marked with asterisks (\*).
- Click **Save**.

# Finding Existing Properties

1. Click **Properties**. The **Property Center** appears.

The screenshot shows the 'PROPERTY CENTER' interface. At the top, there is a navigation bar with links: Home | Mail, Calendar | FAQ | Help | Logout. Below this is a tabbed menu with 'Transactions', 'Orders', 'Properties' (selected), 'Contacts & Providers', 'Documents', 'Reports', and 'Profile & Preferences'. The 'PROPERTY CENTER' title is on the left, and 'Active' and 'Closed' radio buttons are on the right. The search section includes 'Branch:' with a dropdown set to 'East Office', 'Agent:' with a dropdown set to 'Mary Moore', and 'Search by:' with a dropdown set to 'Address' and an adjacent text input field. A 'Search' button is to the right. Below the search section is a table with columns 'Property Id' and 'Property Address'. The table lists three properties for Agent: Mary Moore. Each row has links for 'Transaction List', 'New Transaction', and 'Remove'. At the bottom, it says 'Properties 1-3 of 3' and has an 'Add Property' button.

Property Id	Property Address	Transaction List	New Transaction	Remove
<a href="#">P9718-3649</a>	111 Fake St, Diamond Bar, CA 91765	<a href="#">Transaction List</a>	<a href="#">New Transaction</a>	<a href="#">Remove</a>
<a href="#">P9718-3637</a>	21312 asdfsadf, santa ana, CA 91765	<a href="#">Transaction List</a>	<a href="#">New Transaction</a>	<a href="#">Remove</a>
<a href="#">P9718-3696</a>	23617 Golden Springs Dr K-17, Diamond Bar, CA 91765	<a href="#">Transaction List</a>	<a href="#">New Transaction</a>	<a href="#">Remove</a>

2. Select the **Branch**. If you are the coordinator for a single branch, only your active branch is listed.
3. Select the **Agent**. The page refreshes to show the properties associated with the selected agent.

To limit the search to an address or city, select the **Search by** variable, type at least two characters or numbers for the search, and click **Search**.

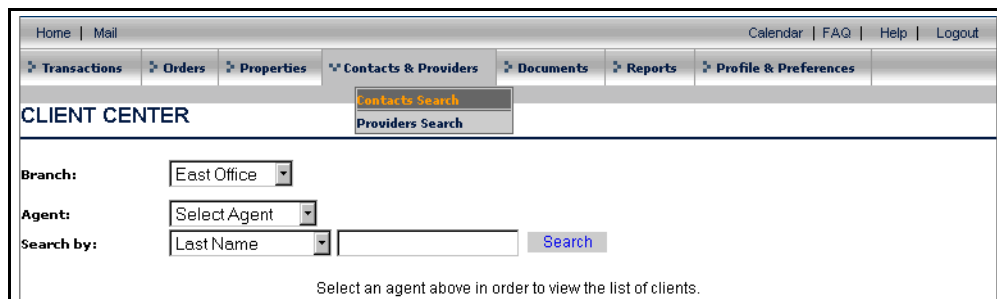
If there are more than 10 properties associated with the agent, click **Next** to view the next page of properties.

# Contacts and Providers

## Searching for Contacts

In the **Client Center**, you can modify client information and view client user names and passwords.

1. Click the **Contacts & Providers** tab.
2. Click **Contacts Search**. The **Client Center** page appears.



Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders Properties **Contacts & Providers** Documents Reports Profile & Preferences

**CLIENT CENTER**

Contacts Search  
Providers Search

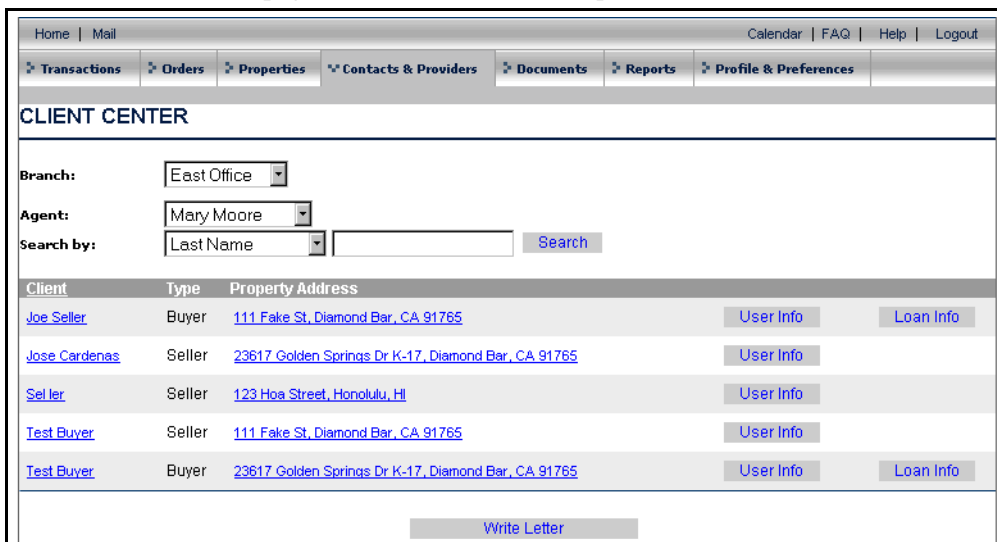
Branch: East Office

Agent: Select Agent

Search by: Last Name  [Search](#)

Select an agent above in order to view the list of clients.

1. Select the **Branch**.
2. Select the **Agent**. The **Client Center** page refreshes to show the clients associated with the selected agent.
3. Click the **Search By** arrow to select a search option (**First Name**, **Last Name**, or **Property Address**.)
4. Type at least two characters of the name or address.
5. Click **Search**. The page refreshes to show the requested clients.



Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders Properties **Contacts & Providers** Documents Reports Profile & Preferences

**CLIENT CENTER**

Branch: East Office

Agent: Mary Moore

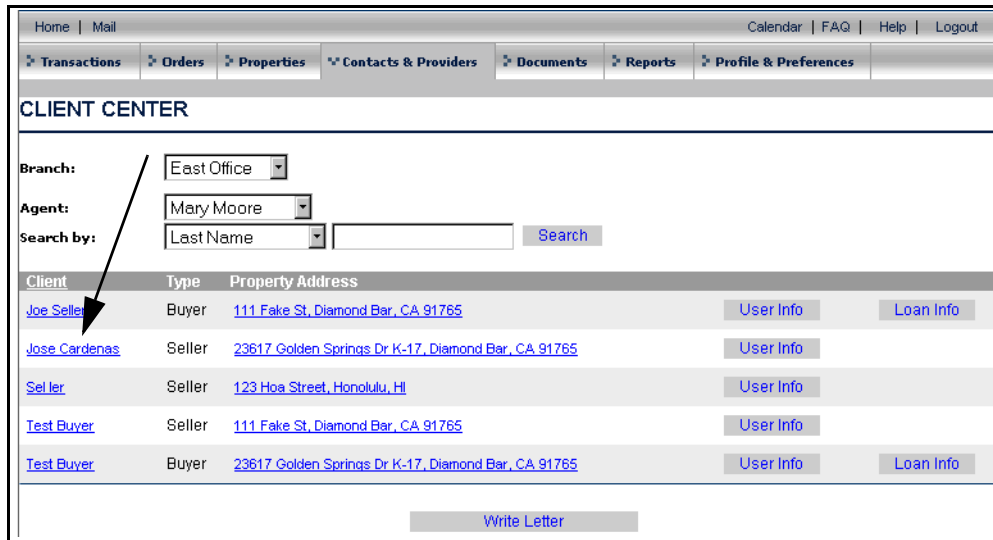
Search by: Last Name  [Search](#)

Client	Type	Property Address		
<a href="#">Joe Seller</a>	Buyer	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Jose Cardenas</a>	Seller	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<a href="#">User Info</a>	
<a href="#">Seller</a>	Seller	<a href="#">123 Hoa Street, Honolulu, HI</a>	<a href="#">User Info</a>	
<a href="#">Test Buyer</a>	Seller	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<a href="#">User Info</a>	
<a href="#">Test Buyer</a>	Buyer	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>

[Write Letter](#)

# Updating Client Information

1. Click the client name.



Home | Mail Calendar | FAQ | Help | Logout

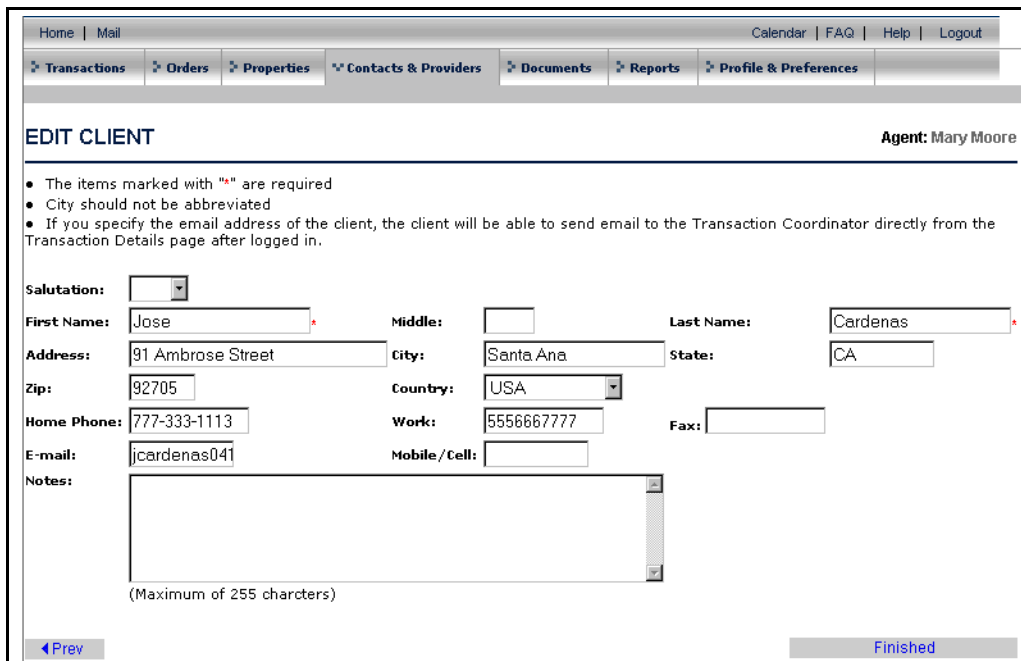
Transactions Orders Properties **Contacts & Providers** Documents Reports Profile & Preferences

### CLIENT CENTER

Branch: East Office  
Agent: Mary Moore  
Search by: Last Name

Client	Type	Property Address	User Info	Loan Info
<a href="#">Joe Seller</a>	Buyer	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	<input type="button" value="Loan Info"/>
<a href="#">Jose Cardenas</a>	Seller	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	
<a href="#">Sel ler</a>	Seller	<a href="#">123 Hoa Street, Honolulu, HI</a>	<input type="button" value="User Info"/>	
<a href="#">Test Buyer</a>	Seller	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	
<a href="#">Test Buyer</a>	Buyer	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	<input type="button" value="Loan Info"/>

The **Edit Client** page appears.



Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders Properties **Contacts & Providers** Documents Reports Profile & Preferences

### EDIT CLIENT Agent: Mary Moore

- The items marked with "\*" are required
- City should not be abbreviated
- If you specify the email address of the client, the client will be able to send email to the Transaction Coordinator directly from the Transaction Details page after logged in.

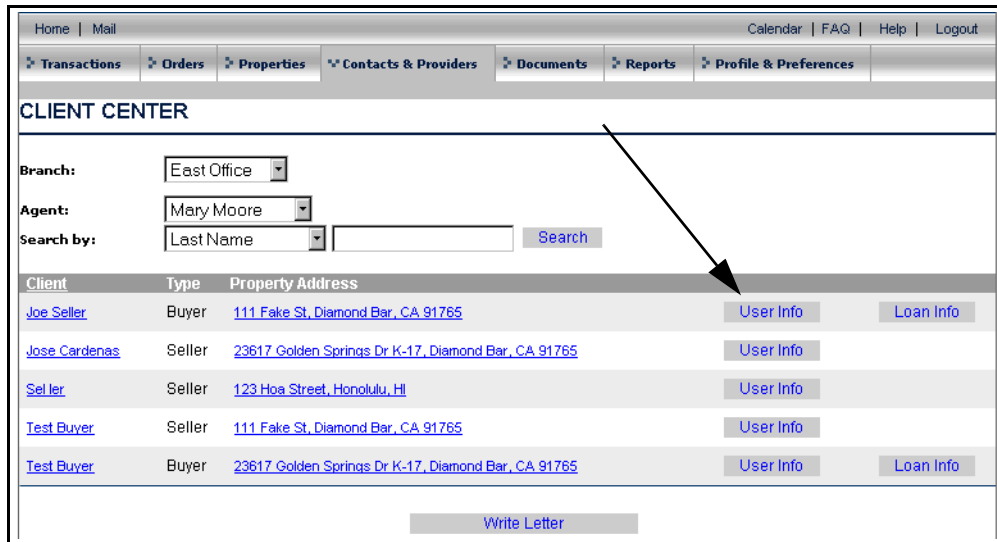
Salutation:   
First Name: \* Middle:  Last Name: \*  
Address:  City:  State:   
Zip:  Country:   
Home Phone:  Work:  Fax:   
E-mail:  Mobile/Cell:   
Notes:   
(Maximum of 255 characters)

2. Edit the client information.
3. Click **Finished**.



# Viewing Client User IDs and Passwords

1. Locate the client in **Client Center**.
2. Click **User Info** for the client.

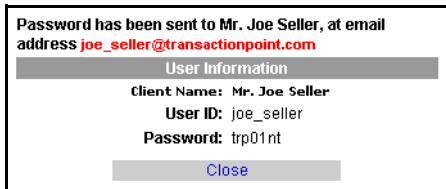


The screenshot shows the 'CLIENT CENTER' interface. At the top, there are navigation tabs: Home, Mail, Calendar, FAQ, Help, and Logout. Below these are tabs for Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, and Profile & Preferences. The main section is titled 'CLIENT CENTER'. It includes a search area with fields for Branch (East Office), Agent (Mary Moore), and Search by (Last Name), along with a Search button. Below the search area is a table of clients. An arrow points to the 'User Info' button for the first client, 'Joe Seller'.

Client	Type	Property Address	User Info	Loan Info
<a href="#">Joe Seller</a>	Buyer	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Jose Cardenas</a>	Seller	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<a href="#">User Info</a>	
<a href="#">Seller</a>	Seller	<a href="#">123 Hoa Street, Honolulu, HI</a>	<a href="#">User Info</a>	
<a href="#">Test Buyer</a>	Seller	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<a href="#">User Info</a>	
<a href="#">Test Buyer</a>	Buyer	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>

At the bottom of the client list, there is a 'Write Letter' button.

If an email address exists for the client, the **User Information** page appears and displays the email address where the user ID and password was sent.



The screenshot shows a 'User Information' dialog box. It contains the following text: 'Password has been sent to Mr. Joe Seller, at email address [joe\\_seller@transactionpoint.com](mailto:joe_seller@transactionpoint.com)'. Below this is a section titled 'User Information' with the following details: 'Client Name: Mr. Joe Seller', 'User ID: joe\_seller', and 'Password: trp01nt'. At the bottom, there is a 'Close' button.

---

**Note:** Clicking the client link multiple times causes multiple messages to be sent to the client with their user ID and Password.

---

If an email address has not been entered for the client, the **User Information** page displays the client user ID and password. You can provide this information to the client in a letter or in a phone conversation.

# Viewing Client Loan Information

1. Locate the client in **Client Center**.
2. Click **Loan Info** for the client.

Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders Properties **Contacts & Providers** Documents Reports Profile & Preferences

### CLIENT CENTER

Branch:

Agent:

Search by:

Client	Type	Property Address	User Info	Loan Info
<a href="#">Joe Seller</a>	Buyer	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	<input type="button" value="Loan Info"/>
<a href="#">Jose Cardenas</a>	Seller	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	
<a href="#">Seller</a>	Seller	<a href="#">123 Hoa Street, Honolulu, HI</a>	<input type="button" value="User Info"/>	
<a href="#">Test Buyer</a>	Seller	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	
<a href="#">Test Buyer</a>	Buyer	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	<input type="button" value="Loan Info"/>

The Loan Information page appears.

**Loan Information** Personal Information Employment Information Income/Expenses Assets/Liabilities Transaction Declaration \* required

#### Type of Mortgage and Terms of Loan

Mortgage Type:  \*

Loan Amount (\$):  \* Interest Rate:  % No. of Months:

Amortization Type:  \*

#### Property Information and Purpose of Loan

Property Address:   
City:  State:  Zipcode:

Legal Description of Subject Property :

Number of Units:  \* Age:  Years

Property will be:

Purpose of Loan:  \*

#### Complete this section if this is a CONSTRUCTION or CONSTRUCTION-PERMANENT loan.

Year lot Acquired :	Original Cost (\$):	Existing Liens (\$):	Present value of lot :	Cost of improvement (\$):
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

#### Complete this section if this is a REFINANCE loan.

Year Acquired :	Original Cost (\$):	Existing Liens (\$):	Purpose of Refinance :
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Describe Improvements : ☐ made ☐ to be made

#### Title

Title will be held in the name :  Manner in which title will be held :

Estate will be held in : ☐ Fee Simple ☐ Leasehold Source of Downpayment :

3. Edit the information as needed.
4. Click **Next** to move through the loan information pages.

## Writing a Client Letter

You can use the **Client Center** to write a letter to the client.

1. Click **Write Letter**.

Home | Mail

Calendar | FAQ | Help | Logout

Transactions Orders Properties Contacts & Providers Documents Reports Profile & Preferences

### CLIENT CENTER

Branch:

Agent:

Search by:

Client	Type	Property Address	User Info	Loan Info
<a href="#">Joe Seller</a>	Buyer	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	<input type="button" value="Loan Info"/>
<a href="#">Jose Cardenas</a>	Seller	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	
<a href="#">Sel ler</a>	Seller	<a href="#">123 Hoa Street, Honolulu, HI</a>	<input type="button" value="User Info"/>	
<a href="#">Test Buyer</a>	Seller	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	
<a href="#">Test Buyer</a>	Buyer	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<input type="button" value="User Info"/>	<input type="button" value="Loan Info"/>

The **Write Letter** page appears.

### Write Letter

- Select a letter template to View, Edit or Delete, or press the *New* button to create a new template.
- To write letters, select a letter template, select recipients, and then press *Merge to Word* to create mail merge letters, which you can then edit or print using the window Print command.

Select a Letter Template

-Default Template- (Default Template for all users) \*

\* Non-editable default template

Select Recipients

☐ [Joe Seller](#)  
PROPERTY:  
111 Fake St Diamond Bar, CA 91765

☐ [Jose Cardenas](#)  
PROPERTY:  
23617 Golden Springs Dr K-17 Diamond Bar, CA 91765

☐ [Sel ler](#)  
PROPERTY:  
123 Hoa Street Honolulu, HI

☐ [Test Buyer](#)  
PROPERTY:  
111 Fake St Diamond Bar, CA 91765

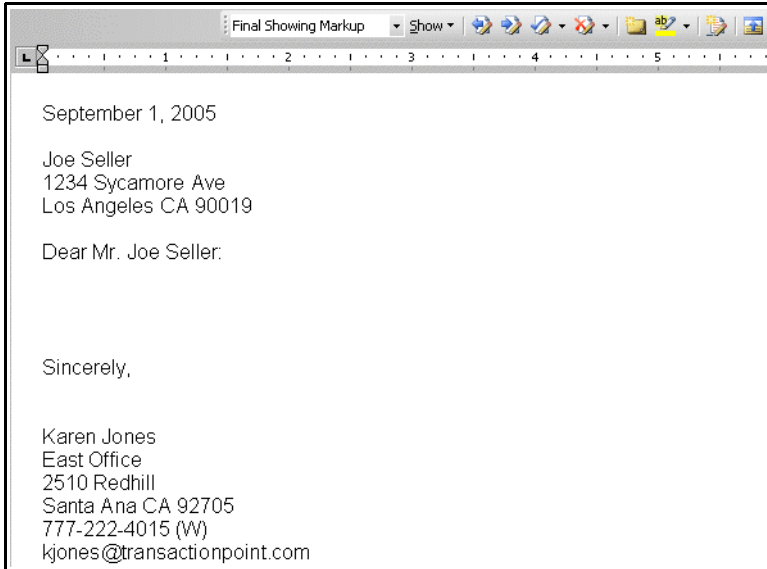
☐ [Test Buyer](#)  
PROPERTY:  
23617 Golden Springs Dr K-17 Diamond Bar, CA 91765

**Note:** All of the clients for the selected agent, except co-buyers and co-sellers, appear in this list.

Use the scroll bar to view additional clients.

2. Select a template for the letter from the **Default Template** pull-down.
3. Select the recipients.
4. Click **Merge to Word** at the bottom of the page.

The Word format page appears. Note that the HTML formatting has been replaced.



5. Enter the body of the letter in the appropriate area, which is usually after the salutation. The letter automatically expands as you type; you are not restricted to the space initially provided.

Use the standard Microsoft Word<sup>®</sup> functions to save the letter to a file for emailing to the client, or you may send the letter to the printer.

## Using Letter Templates

Letter templates provide a means to standardize the format of your letters, and speed up the letter writing process.

### Creating a Template

You can create a new template to use when writing a letter in the Client Center.

1. Click **Write Letter**.

Home | Mail Calendar | FAQ | Help | Logout

Transactions Orders Properties **Contacts & Providers** Documents Reports Profile & Preferences

### CLIENT CENTER

Branch: East Office

Agent: Mary Moore

Search by: Last Name  Search

Client	Type	Property Address	User Info	Loan Info
<a href="#">Joe Seller</a>	Buyer	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<span>User Info</span>	<span>Loan Info</span>
<a href="#">Jose Cardenas</a>	Seller	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<span>User Info</span>	
<a href="#">Sel ler</a>	Seller	<a href="#">123 Hoa Street, Honolulu, HI</a>	<span>User Info</span>	
<a href="#">Test Buyer</a>	Seller	<a href="#">111 Fake St, Diamond Bar, CA 91765</a>	<span>User Info</span>	
<a href="#">Test Buyer</a>	Buyer	<a href="#">23617 Golden Springs Dr K-17, Diamond Bar, CA 91765</a>	<span>User Info</span>	<span>Loan Info</span>

Write Letter

The **Write Letter** page appears.

### Write Letter

- Select a letter template to View, Edit or Delete, or press the *New* button to create a new template.
- To write letters, select a letter template, select recipients, and then press *Merge to Word* to create mail merge letters, which you can then edit or print using the window Print command.

Select a Letter Template

-Default Template- (Default Template for all users) \* View Edit Delete New

\* Non-editable default template

Select Recipients

☐ [Joe Seller](#)  
**PROPERTY:**  
111 Fake St Diamond Bar, CA 91765

☐ [Jose Cardenas](#)  
**PROPERTY:**  
23617 Golden Springs Dr K-17 Diamond Bar, CA 91765

☐ [Sel ler](#)  
**PROPERTY:**  
123 Hoa Street Honolulu, HI

☐ [Test Buyer](#)  
**PROPERTY:**  
111 Fake St Diamond Bar, CA 91765

☐ [Test Buyer](#)  
**PROPERTY:**  
23617 Golden Springs Dr K-17 Diamond Bar, CA 91765

Merge to Word Close

2. Click **New**.

The Template creation page appears.

3. Use the pull-down menus to create the template.

- **Insert Merge Fields:** Date information and all information regarding the location of the property.
- **Insert Contact Merge Fields:** All information regarding the client which includes their first name, last name, address, phone, etc.
- **Insert My Fields:** All information regarding the TC or the full-access Agent in charge of the transaction. This information would include first name, last name, company name, phone number, etc.
- **Start From Existing Templates:** Allows you to base the new template on an existing template.

4. Use the toolbar for including features such as Bold, Italics, Underline, changing font size, changing font, changing font color, etc. The template creation toolbar is similar to the Microsoft Word toolbar.

5. Click **Save**. A page appears for you to provide a name for the new template.

6. Type a **Title** and **Description** for the new template.
7. Click **Save**.
8. Click **Close**. The **Write Letter** page reappears.
9. Click the **Default Template** arrow to see the newly created template in the list.

## Viewing a Template

1. Select a template from the pull down list.
2. Click **View**.

---

**Note:** You cannot make any changes to the template since it is open for read-only viewing.

---

3. Click **Close**.

## Editing a Template

1. Select a template from the pull down list.
2. Click **Edit**.

The page containing the template appears.

3. Make any necessary changes to the template.
4. Click **Save**.
5. Click **Close**.

## Deleting a Template

1. Select the template from the pull-down list.
2. Click **Delete**. A delete confirmation page appears.
3. Click **OK** to confirm the deletion of the selected template. The **Write Letter** page refreshes and the list of available templates is updated.

---

**Note:** The **Write Letter** page is also available in the **Contacts** section of the transaction file.

---

# Searching for Providers

1. Click the **Contacts & Providers** tab.
2. Click **Providers Search**. The **Provider Search** page appears.

The screenshot shows the TransactionPoint application interface. At the top, there is a navigation bar with links for Home, Mail, Calendar, FAQ, Help, and Logout. Below this is a tabbed menu with options: Transactions, Orders, Properties, Contacts & Providers (selected), Documents, Reports, and Profile & Preferences. Under the 'Contacts & Providers' tab, there are two sub-tabs: 'Contacts Search' and 'Providers Search' (which is highlighted). The main content area is titled 'PROVIDER SEARCH'. It contains three input fields: 'Service Provider Type' with a dropdown menu showing 'Appliance', 'Search By' with a dropdown menu showing 'Provider Name', and 'Search Text' with an empty text box. A 'Search' button is located at the bottom right of the form.

3. Select the **Provider Type**.
4. Select the **Search By** option.
5. Type at least two characters of the **Search text**.
6. Click **Search**. The page refreshes to show the basic provider information.

The screenshot shows the TransactionPoint application interface after a search. The navigation bar and tabs are the same as in the previous screenshot. The 'Providers Search' sub-tab is still selected. The 'PROVIDER SEARCH' section now displays the search results. The 'Service Provider Type' dropdown is set to 'Home Inspection', the 'Search By' dropdown is set to 'Company Name', and the 'Search Text' field contains 'usa'. A 'Search' button is still present. Below the search fields, there is a table titled 'Search Results' with three columns: 'Provider Name', 'Company', and 'Address'. The table contains one row of data: 'Gary Paul' (with a blue link), 'USA Inspections', and '789 El Camino Real, Sunnyvale, CA, 94086'. At the bottom left, it says 'Showing 1-1 of 1'. At the bottom right, there is a 'RealEC' logo.

Provider Name	Company	Address
<a href="#">Gary Paul</a>	USA Inspections	789 El Camino Real, Sunnyvale, CA, 94086



7. Click the provider name to view all available information about the provider.

<b>Gary Paul, USA Inspections</b>		
<b>Contact Information</b>		
<b>Mailing Address</b>	<b>Registered Address</b>	
<b>USA Inspections</b> 789 El Camino Real Sunnyvale, CA 94086	<b>USA Inspections</b> 789 El Camino Real Sunnyvale, CA 94086	
<b>Work Phone:</b> 11111111111111		
<b>Home Phone:</b>		
<b>Fax:</b> 22222222222222		
<b>Email:</b> <a href="mailto:gpaul@transactionpoint.com">gpaul@transactionpoint.com</a>		
<b>Service Coverage Area (County,State)</b>		
ALAMEDA, CA	ALPINE, CA	LOS ANGELES, CA
ORANGE, CA	SANTA CLARA, CA	SHASTA, CA
<b>Services Offered</b>		
Appraisal	Chimney Inspection	Closing
Foundation Inspection	Home Inspection	Home Services
Home Warranty	Insurance	Lead/Paint Inspection
Loan (Document)	Loans/Mortgage	Pest Control Inspection
Pool/spa Inspection	Professional Services	Roof Inspection
Structural Engineer	Title	Warranty Deed
<b>Office Hours</b>		
Not Available		

# Document Center

You can receive fax or e-mail documents, print documents to TransactionPoint, or upload documents located on your computer.

---

**Note:** The documents you upload must have a file type of .doc, .txt, .pdf, .tif, .dot, .rtf, .xls, .ppt, or .mpp.

---

To view PDF documents that have been uploaded, you must have Adobe Acrobat Reader® installed on your computer. You can obtain a free copy at [www.adobe.com](http://www.adobe.com).

## Viewing Documents

1. Click **Documents**. The **Document Center** page appears.

2. Select from one or more of the following lists to locate a transaction.
  - Branch
  - Agent
  - Agent representation
  - Status (transaction status)
  - With (activity status)
  - Other filters (with text box for additional filtering)
3. Click **Search Transactions**.
4. In the **Transaction** list, select a transaction. The **Document Center** page refreshes to show the transaction and any

documents associated with that transaction.

Home | Mail | FAQ | Help | Logout

Transactions | Orders | Properties | Contacts & Providers | Documents | Reports | Profile & Preferences

DOCUMENT CENTER [Download Document Management Tool](#) ?

Branch: ABC Realty - Glendale Branch Agent: William Atkins

Agent Represents: Seller Status: Show All With: Show All

Other Filters: Property Address: 245 Search Transactions

Transaction: 6225-6428 (2451 Montrose Ave. Montrose, CA 91020) Upload Document

Inbox Documents		Transaction Documents						
Document Name	Date	Transaction ID: 6225-6428 2451 Montrose Ave. Montrose, CA 91020						
		Mail	Move/Copy	Privilege	Rename	Archive	Remove	Print
Name	Approved	Archive	Tracking#	Upload Date	Log	Privilege		
Transaction Documents								
<input type="checkbox"/> Buyer's Agency Disc...				6225-6428	10/26/2007 3:00:42 PM (PDT)			
<input type="checkbox"/> Home Warranty				6225-6428	10/26/2007 2:59:11 PM (PDT)			
<input type="checkbox"/> Homeowner Association...				6225-6428	10/26/2007 3:00:14 PM (PDT)			
<input type="checkbox"/> Neutral Hazard Disc...				6225-6428	10/26/2007 2:59:45 PM (PDT)			
		Mail	Move/Copy	Privilege	Rename	Archive	Remove	Print

## Moving Inbox Documents

Any documents received by Fax or TransactionPoint email are listed under **Inbox Documents**.

If the document was emailed to the special email ID `[username]transactionid/orderid@trpoint.com`, the document is automatically uploaded to the specified transaction or order. The meaning of the special ID is as follows:

- Indicates that this is an optional field. If the optional field is specified, the dollar sign (\$) delimiter must also be specified.
- The delimiter. If the optional field is not specified, the delimiter should not be used.
- Transaction or order identity number.
- **T** for Transaction or **O** for order. The default is **T**.

**Examples** A document emailed to **1023-1234@trpoint.com** is automatically uploaded to transaction **1023-1234**, regardless of who is the transaction coordinator or agent.

The document is uploaded with the access privilege of the transaction coordinator or agent if the *username* is specified and will be marked either public or private based on what the transaction coordinator or agent had selected for access privileges under their profile.

1. Select the check box next to the documents you want to move.
2. Click **Move** to associate the document or documents with a property, transaction, or order for this agent. The **Move or**



**Copy Document** page appears.

**MOVE OR COPY DOCUMENT**

- Optionally, specify a new name for each document.
- Specify a destination to which to move or copy the document(s).
- Press the Move button to move the document(s), the Copy button to copy the document(s), or press Cancel to cancel the action

List of Documents Selected	
Document Name	Rename To
1) Buyer's Agency Disclosure	

Select Action	
<input type="radio"/> Attach document to Activity <input checked="" type="checkbox"/> Override current document privilege with selected activity template privilege	
<input checked="" type="radio"/> Attach document to Transaction Enter Transaction #: <input type="text" value="6225-6428"/>	
<input type="radio"/> Attach document to an order # Enter Order #: <input type="text"/>	

Copy Move Close

- Select whether you want to associate the document with an activity, a transaction number, or an order number. If you select activity, click the magnifying glass to select the specific activity. Also, if applicable, check the box next to **Override the current document privilege with selected activity template privilege**.
- If you select transaction or order, enter the transaction or order number or click the **Search** icon to search for the transaction.

**Transaction Search**

Branch:	Agent: (* InActive Agents)
ABC Realty - Glendale Branch	Atkins, William
Agent Represents: Show All	Status: Show All
With: Show All	
Other Filters: Property Address	<input type="text"/>
<input type="button" value="Search"/>	
<input type="button" value="Cancel"/>	

- Select from one or more of the following lists to locate the transaction:
  - Branch
  - Agent
  - Agent's representation
  - Status (transaction status)
  - With (Activity status)
  - Other filters (with text box for additional filtering)
- Click **Search**.
- In the **Transaction** list, select the transaction and click **Select**. The transaction number appears in the **Enter Transaction #** text box.

**Note:** You can rename the document by providing a new name for the document in the **Rename To** field. If you select

multiple documents to be moved, you can rename each document.

---

5. Click **Move**.

---

**Note:** You must fill in the **Transaction #** or **Order #** if you want to associate the document with a transaction or an order and click the appropriate option button. If you do not fill in the **Transaction #** or **Order #** information, the document is associated with the **Property Address** that is displayed on the page.

---

The **Document Center** page updates to show the document is now associated with the property, transaction, or order and appears under **Transaction Documents**.

## Uploading Documents

1. Click **Documents**. The **Document Center** page appears.
2. Select from one or more of the following lists to locate the transaction:
  - Branch
  - Agent
  - Agent's representation
  - Status (transaction status)
  - With (Activity status)
  - Other filters (with text box for additional filtering)
3. Click **Search Transactions**.
4. In the **Transaction** list, select a transaction. The **Document Center** page refreshes to show the transaction and any

documents associated with that transaction.

5. Click **Upload Document** to start the upload process. The **Upload Document** page appears.

6. Enter the **Document Name**.
7. Click **Browse** to locate the file to be uploaded.
8. Select the **Document Security** option.
9. Select the **Include in Customized Archive** option.
10. Click **Upload**. The document appears in the **Transaction Documents** section.

# Viewing Document History

1. Click the **L** icon associated with the document.

The **Document History** page appears, displaying the following information:

- Who has accessed the document
- When the document was uploaded.
- Who has viewed the document and the date and time of the viewing
- The e-mail address of the individual who viewed the document.

2. Click **Close** to return to the **Document Center** page.

# Assigning Document Access Privileges

The default access privilege for all documents is private; the agent and the coordinator can always view the document. If you want to allow others to be able to view a document, you must change the access privileges.

1. Select the **P** icon associated with the document.

Home | Mail | FAQ | Help | Logout

Transactions | Orders | Properties | Contacts & Providers | Documents | Reports | Profile & Preferences

**DOCUMENT CENTER** [Download Document Management Tool](#) ?

Branch: ABC Realty - Glendale Branch Agent: William Atkins

Agent Represents: Seller Status: Show All With: Show All

Other Filters: Property Address 245 [Search Transactions](#)

Transaction: 6225-6428 (2451 Montrose Ave. Montrose, CA 91020) [Upload Document](#)

Inbox Documents		Transaction Documents						
Document Name	Date	Transaction ID: 6225-6428 2451 Montrose Ave. Montrose, CA 91020						
		Mail	Move/Copy	Privilege	Rename	Archive	Remove	Print
		Name	Approved	Archive	Tracking#	Upload Date	Log	Privilege
<b>Transaction Documents</b>								
<input type="checkbox"/>	Buyer's Agency Disc...			6225-6428	10/26/2007 3:00:42 PM (PDT)			P
<input type="checkbox"/>	Home Warranty			6225-6428	10/26/2007 2:59:11 PM (PDT)			P
<input type="checkbox"/>	Homeowner Association...			6225-6428	10/26/2007 3:00:14 PM (PDT)			P
<input type="checkbox"/>	Neutral Hazard Disc...			6225-6428	10/26/2007 2:59:45 PM (PDT)			P
		Mail	Move/Copy	Privilege	Rename	Archive	Remove	Print

The **Document Privilege** page appears.

**DOCUMENT PRIVILEGE**

**Document Rename**

Document Name: Buyer's Agency Disclosure Uploaded On: 10/26/2007 3:00:42 PM (PDT)

Rename To:

**Document Security**

☒ Document is Public  
☐ Document is Private

**Document Access**

If the Document is Private, please select the parties who have access to the document:

☐ Buyer's Agent: Margaret Williams, Westside Realty  
☐ Seller: Amy Durst  
☐ Buyer: Patrick Smith  
☐ CLOSING: Clem Roberts, Glendale Valley Closing

[Submit](#) [Cancel](#)

2. Rename the document, if necessary.
3. Select the **Document is Public** option to allow anyone to view the document; select **Document is Private** to limit the access to Buyers, Sellers, transaction participants, and/or Other Agents.
4. Select the check boxes of the individuals listed in the **Document Access** section to whom you would like to grant document access.



5. Click **Submit** to return to the **Document Center** page.

## E-mailing a Document

You can send a document by e-mail to any of your contacts.

1. Select the check box of the document to be sent as an attachment to an e-mail message.
2. Click **Mail**.

The screenshot shows the TransactionPoint Document Center interface. At the top, there is a navigation bar with links: Home, Mail, Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, Profile & Preferences, and a Logout link. Below this is the 'DOCUMENT CENTER' header with a 'Download Document Management Tool' link and a help icon. The main area contains search filters: Branch (ABC Realty - Glendale Branch), Agent (William Atkins), Agent Represents (Seller), Status (Show All), With (Show All), and Other Filters (Property Address: 245). A 'Search Transactions' button is present. Below the filters, a transaction is selected: 6225-6428 (2451 Montrose Ave. Montrose, CA 91020). An 'Upload Document' button is also visible. The 'Inbox Documents' table is empty. The 'Transaction Documents' table for transaction 6225-6428 shows four documents: Buyer's Agency Disc..., Home Warranty, Homeowner Association..., and Natural Hazard Disc... Each document has a checkbox, a status icon, and a date. The 'Mail' button for the first document is highlighted with a red arrow. Below the table, there are buttons for Mail, Move/Copy, Privilege, Rename, Archive, Remove, and Print.

Document Name	Date

Transaction ID: 6225-6428	2451 Montrose Ave. Montrose, CA 91020
<input type="checkbox"/> Buyer's Agency Disc...	6225-6428 10/26/2007 3:00:42 PM (PDT)
<input type="checkbox"/> Home Warranty	6225-6428 10/26/2007 2:59:11 PM (PDT)
<input type="checkbox"/> Homeowner Association...	6225-6428 10/26/2007 3:00:14 PM (PDT)
<input type="checkbox"/> Natural Hazard Disc...	6225-6428 10/26/2007 2:59:45 PM (PDT)


The **Mail Document** page appears.

MAIL DOCUMENTS

List of Documents Selected

1) Home Warranty

Select Recipients

☒ **Transaction Coordinator:** Janet Moore, ABC Realty - Glendale Branch (Email: janetmoore@demotrpoint.com) 

☐ **Seller's Agent:** William Atkins, ABC Realty - Glendale Branch (Email: billatkins@demotrpoint.com)

☐ **Co-Seller's Agent:** Karen Anderson, ABC Realty - Glendale Branch (Email: karenanderson@demotrpoint.com)

☒ **Buyer's Agent:** Margaret Williams, Westside Realty (Email: mwilliams@met.com)

☐ **Seller:** Amy Durst (Email: amyhurst@bluemountain.net)

☒ **Buyer:** Patrick Smith (Email: patsmith@home.com)

☒ **CLOSING:** Clem Roberts, Glendale Valley Closing (Email: gscrow@gsc.com)

☐ **APPRAISAL:** Dave Scott, San Gabriel Appraisers (Email: dscott@sangabapp.com)

☐ **CLOSING:** Elizabeth Knoll, College Escrow (Email: eknoll@collegeescrow.com)

\* No Email specified or the user might have different notification or no notification method.

Mail Options

Enter Other Recipients:

(separated by ' , ')

Subject:

Message:

Send

Close

3. Select the check boxes of the recipients to receive the document.

---

**Note:** All selected recipients must have an e-mail address set up in their profiles.

---

4. Add more recipients by entering additional e-mail addresses in the **Enter Other Recipients** field. Separate addresses with a comma.
5. Enter a **Subject** and a **Message**, then click **Send**.

# Archiving Transaction Documents

1. Select the check box of the document to be archived and click **Archive**.

Home | Mail | [FAQ](#) | [Help](#) | [Logout](#)

[Transactions](#) | [Orders](#) | [Properties](#) | [Contacts & Providers](#) | **Documents** | [Reports](#) | [Profile & Preferences](#)

## DOCUMENT CENTER

[Download Document Management Tool](#) ?

Branch: ABC Realty - Glendale Branch Agent: William Atkins

Agent Represents: Seller Status: Show All With: Show All

Other Filters: Property Address 245 [Search Transactions](#)

Transaction: 6225-6428 (2451 Montrose Ave. Montrose, CA 91020) [Upload Document](#)

Inbox Documents		Transaction Documents						
Document Name	Date	Transaction ID: 6225-6428 2451 Montrose Ave. Montrose, CA 91020						
		Mail	Move/Copy	Privilege	Rename	Archive	Remove	Print
Name	Approved	Archive	Tracking#	Upload Date	Log	Privilege		
<input type="checkbox"/> Buyer's Agency Disc...			6225-6428	10/26/2007 3:00:42 PM (PDT)		P		
<input type="checkbox"/> Home Warranty			6225-6428	10/26/2007 2:59:11 PM (PDT)		P		
<input type="checkbox"/> Homeowner Association...			6225-6428	10/26/2007 3:00:14 PM (PDT)		P		
<input checked="" type="checkbox"/> Neutral Hazard Disc...			6225-6428	10/26/2007 2:59:45 PM (PDT)		P		
		Mail	Move/Copy	Privilege	Rename	Archive	Remove	Print

The **Archive** page appears.

### DOCUMENTS - CUSTOMIZED ARCHIVE

- Specify customized archive options for document(s).
- Press the Submit button to save the changes, or press Cancel to cancel the action.

List of Documents Selected	
Document Name	Customized Archive?
1) Neutral Hazard Disclosure	<input type="checkbox"/>

[Submit](#) [Cancel](#)

2. Click **Submit**.

# Moving and Copying Transaction Documents

Documents can be moved or copied from one transaction to another, to an activity, or to an order.

1. Select the check box of the document to be moved or copied and click **Move/Copy**.

The screenshot shows the TransactionPoint Document Center. At the top, there are navigation tabs: Home, Mail, Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, Profile & Preferences. Below these are filters for Branch (ABC Realty - Glendale Branch), Agent (William Atkins), Agent Represents (Seller), Status (Show All), and With (Show All). There is a search bar for Property Address (245) and a transaction dropdown (6225-6428 (2451 Montrose Ave. Montrose, CA 91020)). The main section is titled 'DOCUMENT CENTER' and contains two tables: 'Inbox Documents' and 'Transaction Documents'. The 'Transaction Documents' table has columns: Name, Approved, Archive, Tracking#, Upload Date, Log, and Privilege. It lists four documents: Buyer's Agency Disc..., Home Warranty, Homeowner Association..., and Neutral Hazard Disc... The 'Move/Copy' button is highlighted with a red box and an arrow.

The **Move/Copy Document** page appears.

The screenshot shows the 'MOVE OR COPY DOCUMENT' page. It has a section for instructions: 'Optionally, specify a new name for each document.', 'Specify a destination to which to move or copy the document(s).', and 'Press the Move button to move the document(s), the Copy button to copy the document(s), or press Cancel to cancel the action'. Below this is a table titled 'List of Documents Selected' with columns 'Document Name' and 'Rename To'. It lists '1) Homeowner Association Information'. The 'Select Action' section has three radio buttons: 'Attach document to Activity', 'Attach document to Transaction' (selected), and 'Attach document to an order #'. The 'Attach document to Transaction' option has a text field for 'Enter Transaction #' with the value '6225-6428'. At the bottom are buttons for 'Copy', 'Move', and 'Close'.

2. Rename the document, if necessary.
3. Select the option for the action you want to take:
  - Attach document to an activity - click the **Search** icon to select the activity.

- i. In the **Activity Name** text box enter the name of the activity and click **Search**.

- ii. From the results, select the option for the document you want to attach.

- iii. Click **Select**. The document is now attached to the activity.

- Attach document to transaction - click the **Search** icon to locate a transaction.

- i. In the **Transaction Search** page select from the lists to locate the transaction.

- ii. In the **Other Filters** list select an option and enter additional information in the adjacent text box.

- iii. Click **Search**.

- iv. In the **Transaction** list, select the transaction to which the document will be attached and click **Select**.

The new transaction appears in the **Select Action** section.

- Attach document to order # - enter the order number in the adjacent text box.

#### 4. Click:

- **Move** to move the document to the selected option.

---

**Note:** The page refreshes and shows that the document is no longer associated with the transaction. There is no visual indicator as to where you moved the document. You need to note the address to where you moved the document.

---

- **Copy** to copy the document to the selected option.

## Removing a Document

You can remove documents from either the **Inbox Documents** list or the **Transaction Documents** list.

1. Select the check box of the document you want to remove and click **Remove**.

The screenshot shows the TransactionPoint Document Center interface. The 'Transaction Documents' section is active, displaying a list of documents for transaction 6225-6428. The 'Neutral Hazard Disclosure' document is selected with a checkmark. The 'Remove' button is highlighted with a red box and an arrow.

Inbox Documents		Transaction Documents	
Document Name	Date	Transaction ID: 6225-6428	2451 Montrose Ave. Montrose, CA 91020
		<a href="#">Mail</a> <a href="#">Move/Copy</a> <a href="#">Privilege</a> <a href="#">Rename</a> <a href="#">Archive</a> <a href="#">Remove</a> <a href="#">Print</a>	
Name	Approved	Archive	Tracking#
<b>Transaction Documents</b>			
<input type="checkbox"/> <a href="#">Buyer's Agency Disc...</a>	<input type="checkbox"/>		6225-6428 10/26/2007 3:00:42 PM (PDT)
<input type="checkbox"/> <a href="#">Home Warranty</a>	<input type="checkbox"/>		6225-6428 10/26/2007 2:59:11 PM (PDT)
<input type="checkbox"/> <a href="#">Homeowner Association...</a>	<input type="checkbox"/>		6225-6428 10/26/2007 3:00:14 PM (PDT)
<input checked="" type="checkbox"/> <a href="#">Neutral Hazard Disc...</a>	<input checked="" type="checkbox"/>		6225-6428 10/26/2007 2:59:45 PM (PDT)
		<a href="#">Mail</a> <a href="#">Move/Copy</a> <a href="#">Privilege</a> <a href="#">Rename</a> <a href="#">Archive</a> <a href="#">Remove</a> <a href="#">Print</a>	

The **Remove Document** page appears.

The screenshot shows the 'REMOVE DOCUMENT' page. It displays a list of selected documents: '1) Neutral Hazard Disclosure'. Below the list, it asks 'Are you sure you want to remove these documents?' and provides 'Remove' and 'Close' buttons.

2. Click **Remove**. The document is removed from the **Transaction Documents** section.

# Using Document / Activity Defaults

The Site Administrator can set default names for documents faxed or uploaded directly to an activity. Then, each time you fax a document into an activity using the fax cover sheet or upload a document directly to an activity, the document is named automatically.

---

**Note:** This feature is not available on documents that are emailed into TransactionPoint.

---

## Faxing a Document Using an Activity-Specific Fax Cover Sheet

1. Click the **Activities/Orders/Docs** tab within the transaction.

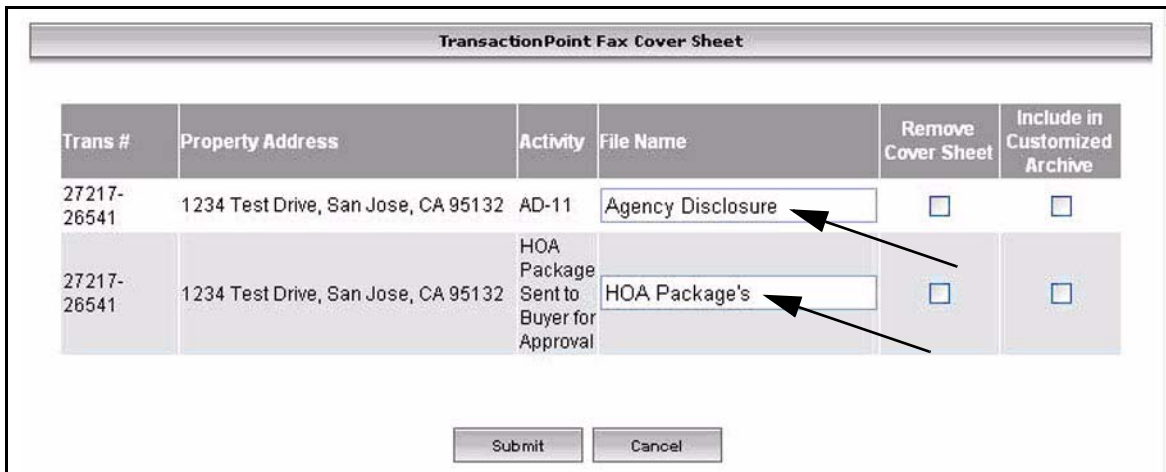
The screenshot shows the TransactionPoint interface with the 'Activities/Orders/Docs' tab selected. The 'Activities' section is expanded, displaying a list of activities. The 'Fax Cover' button is highlighted with an arrow. The 'AD-11' activity is checked with a green box, also indicated by an arrow.

Priority	Activity	Due	Completed	Log	Orders	Docs
2	Activity1	3/24/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Activity2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	AD-11	3/23/2006	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Appraisal Ordered	3/14/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	Debs Activity	4/7/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	General Documents and Orders		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	HOA Package Sent to Buyer for Approval	3/18/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Loan - Contract to Lender	3/18/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	SDS	3/16/2006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Check the boxes to the left of the activities for which you want to create fax cover sheets.

3. Click the **Fax Cover** button.

A pop-up window appears with the default document names. You can rename documents using any letters, numbers, and punctuation marks.



The image shows a screenshot of a web application window titled "TransactionPoint Fax Cover Sheet". It contains a table with two rows of transaction data. The first row has a transaction number "27217-26541", a property address "1234 Test Drive, San Jose, CA 95132", and an activity "AD-11". The second row has the same transaction number and address, but the activity is "HOA Package Sent to Buyer for Approval". Both rows have a "File Name" column with text input fields containing "Agency Disclosure" and "HOA Package's" respectively. Arrows point to these input fields. To the right of the table are two columns: "Remove Cover Sheet" and "Include in Customized Archive", each with a checkbox. At the bottom of the window are "Submit" and "Cancel" buttons.

Trans #	Property Address	Activity	File Name	Remove Cover Sheet	Include in Customized Archive
27217-26541	1234 Test Drive, San Jose, CA 95132	AD-11	Agency Disclosure	<input type="checkbox"/>	<input type="checkbox"/>
27217-26541	1234 Test Drive, San Jose, CA 95132	HOA Package Sent to Buyer for Approval	HOA Package's	<input type="checkbox"/>	<input type="checkbox"/>

Submit Cancel

4. If applicable, check **Remove Cover Sheet**.
5. If applicable, check **Include in Customize Archive**.
6. Click **Submit**.

## Uploading an Activity-Specific Document

---

**Note:** Documents can be split and renamed as multiple PDF files after uploading. See *Splitting a Document into Multiple Documents* on page 93.

---



1. Click on the **Activities/Orders/Docs** tab within the transaction.

The screenshot shows the TransactionPoint interface with the 'Activities/Orders/Docs' tab selected. The 'Activities' section is expanded, showing a list of activities. The 'Docs' column contains a 'D' icon for each activity, which is used to upload documents. An arrow points to the 'D' icon for the activity 'HOA Package Sent to Buyer for Approval'.

Priority	Activity	Due	Completed	Log	Orders	Docs
2	Activity1	3/24/2006				D
	Activity2					D
3	AD-11	3/23/2006				D
	Appraisal Ordered	3/14/2006				D
1	Debs Activity	4/7/2006				D
	General Documents and Orders					D
	HOA Package Sent to Buyer for Approval	3/18/2006				D
	Loan - Contract to Lender	3/18/2006				D
	SDS	3/16/2006				D

2. Click the **D** icon associated with the activity to which you want to upload a document.

A pop-up window appears with the default document name. You can rename documents using any letters, numbers, and punctuation marks.

Activity Document List

Close

Transaction #: 6225-6428

Property: 2451 Montrose Ave. , Montrose, CA 91020

Closing #: 07-055-2451

Age: 12

Property Type: Single Family

Sales Price: \$449,000.00

Seller's Agent: William Atkins

APN #:

Activity: HOA By-Laws

- Select inbox documents to move or copy to the current activity, or upload a document to the current activity.
- Manage Activity Documents: view, mail, move, copy, change access privileges or view access history.

Inbox Documents

Document Name

Date

Document Upload

Document Name:

HOA By-Laws

Select File:

omeowner Association Information Request

Browse...

Document Security:

☒ Document is Public
 ☐ Document is Private

Include in Customized Archive:

☐ Yes
 ☒ No

Upload

Activity Documents

Name

Approved

Archive

Tracking#

Upload Date

Log

Privilege

Close

1. Click **Browse** to locate the document you want to upload, then click **Upload**. The document appears in the **Activity Documents** section.

Activity Document List

Close

Transaction #: 6225-6428

Property: 2451 Montrose Ave. , Montrose, CA 91020

Closing #: 07-055-2451

Age: 12

Property Type: Single Family

Sales Price: \$449,000.00

Seller's Agent: William Atkins

APN #:

Activity: HOA By-Laws

- Select inbox documents to move or copy to the current activity, or upload a document to the current activity.
- Manage Activity Documents: view, mail, move, copy, change access privileges or view access history.

Inbox Documents

Document Name

Date

Document Upload

Document Name:

HOA By-Laws

Select File:

Browse...

Document Security:

☒ Document is Public
 ☐ Document is Private

Include in Customized Archive:

☐ Yes
 ☒ No

Upload

Activity Documents

Name

Approved

Archive

Tracking#

Upload Date

Log

Privilege

☐

HOA By-Laws

6225-6428

10/28/2007 9:50:20 PM (PDT)

Mail

Move/Copy

Privilege

Rename

Archive

Remove

Print

Close

2. Click **Close** to close the **Activity Document List** page.

## Using Default Document Privileges

The Site Administrator can set default viewing privileges for documents faxed or uploaded directly to an activity. Then, each time you fax a document into an activity using the fax cover sheet or upload a document directly to an activity, TransactionPoint automatically sets the privilege to **Public** or **Private** access:

- **Public** access makes the document viewable to all parties named in the transaction.

- **Private** access makes the document viewable only to the Primary Agent, Transaction Coordinator, Super User and any other parties specified at the Admin level.

When a document is uploaded to an activity, the privilege is indicated in the Activity Document List.

The screenshot shows the 'Activity Document List' window. At the top, it displays transaction details: Transaction # 6225-6428, Property 2451 Montrose Ave., Montrose, CA 91020, Closing # 07-055-2451, Age 12, Property Type Single Family, Sales Price \$449,000.00, Seller's Agent William Atkins, and APN #. Below this, the 'Activity: HOA By-Laws' section lists two actions: 'Select inbox documents to move or copy to the current activity, or upload a document to the current activity.' and 'Manage Activity Documents: view, mail, move, copy, change access privileges or view access history.' The 'Document Upload' section includes a 'Document Name' field with 'HOA By-Laws', a 'Select File' button, and 'Document Security' options: 'Document is Public' (unselected) and 'Document is Private' (selected). There are also 'Include in Customized Archive' options: 'Yes' (unselected) and 'No' (selected). An 'Upload' button is at the bottom of this section. Below the upload section is the 'Activity Documents' table. The table has columns: Name, Approved, Archive, Tracking#, Upload Date, Log, and Privilege. The first row shows 'HOA By-Laws' with a checkbox, a folder icon, the tracking number 6225-6428, and an upload date of 10/28/2007 9:50:20 PM (PDT). The 'Privilege' column shows a 'P' icon. Below the table are buttons for Mail, Move/Copy, Privilege, Rename, Archive, Remove, and Print. A 'Close' button is at the bottom of the window.

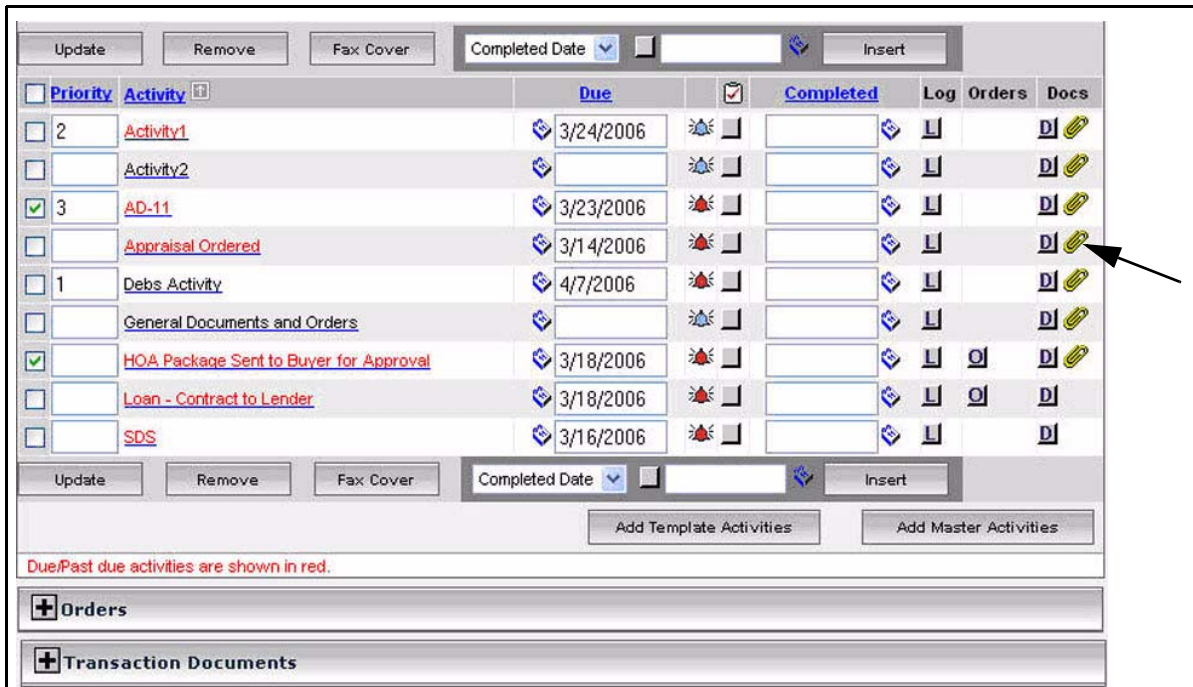
The Site Administrator may set the document privilege to **Private** and give viewing access to the following people:

- Buyer
- Seller
- Buyer's Agent
- Seller's Agent
- Escrow

**Note:** You can change the viewing access after the document is uploaded or faxed in by clicking the **P** under Privilege.

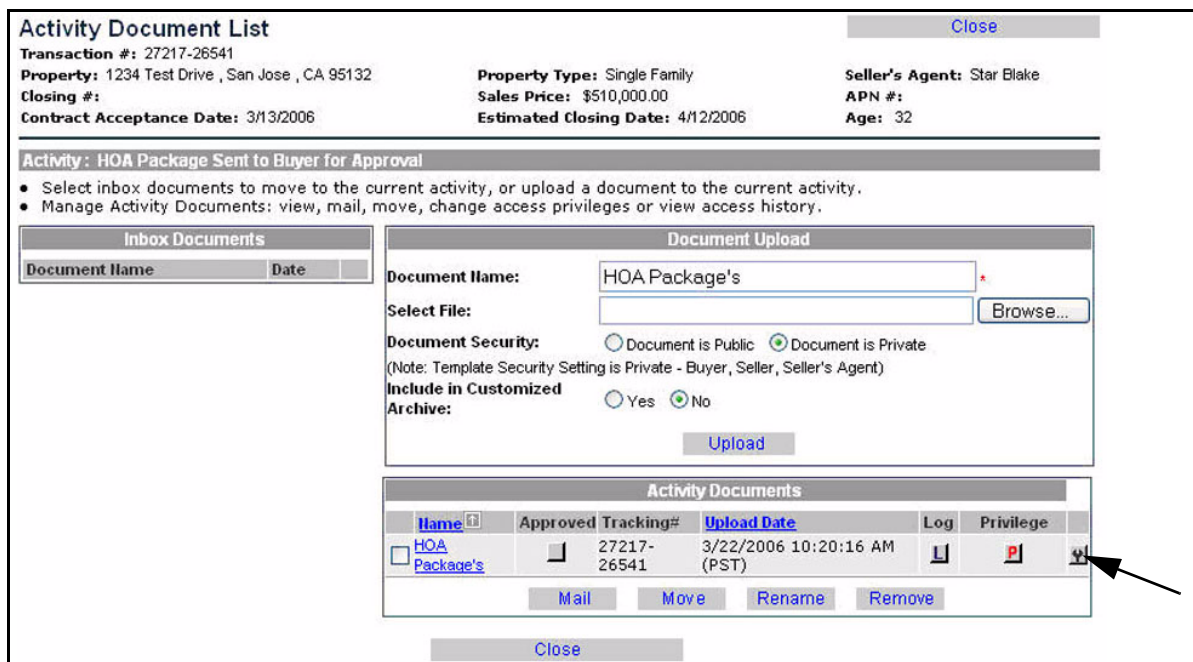
# Splitting a Document into Multiple Documents

You can fax, email, or upload a group of documents into TransactionPoint at one time and break them into individual documents within TransactionPoint:



Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	2 Activity1	3/24/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Activity2		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	3 AD-11	3/23/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Appraisal Ordered	3/14/2006	<input type="checkbox"/>			
<input type="checkbox"/>	1 Debs Activity	4/7/2006	<input type="checkbox"/>			
<input type="checkbox"/>	General Documents and Orders		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	HOA Package Sent to Buyer for Approval	3/18/2006	<input type="checkbox"/>			
<input type="checkbox"/>	Loan - Contract to Lender	3/18/2006	<input type="checkbox"/>			
<input type="checkbox"/>	SDS	3/16/2006	<input type="checkbox"/>			

1. Click the **Activities/Orders/Docs** tab within the transaction.
2. Click the paper clip next to the activity document you want to split. The Activity Document List appears.



**Activity Document List** Close

Transaction #: 27217-26541  
 Property: 1234 Test Drive, San Jose, CA 95132  
 Closing #:   
 Contract Acceptance Date: 3/13/2006

Property Type: Single Family  
 Sales Price: \$510,000.00  
 Estimated Closing Date: 4/12/2006

Seller's Agent: Star Blake  
 APN #:   
 Age: 32

---

**Activity: HOA Package Sent to Buyer for Approval**

- Select inbox documents to move to the current activity, or upload a document to the current activity.
- Manage Activity Documents: view, mail, move, change access privileges or view access history.

**Inbox Documents**

Document Name	Date

**Document Upload**

Document Name:

Select File:  Browse...

Document Security: ☐ Document is Public ☒ Document is Private  
 (Note: Template Security Setting is Private - Buyer, Seller, Seller's Agent)

Include in Customized Archive: ☐ Yes ☒ No

Upload

**Activity Documents**

Name	Approved	Tracking#	Upload Date	Log	Privilege
<input type="checkbox"/> HOA Package's		27217-26541	3/22/2006 10:20:16 AM (PST)		

Mail Move Rename Remove

Close

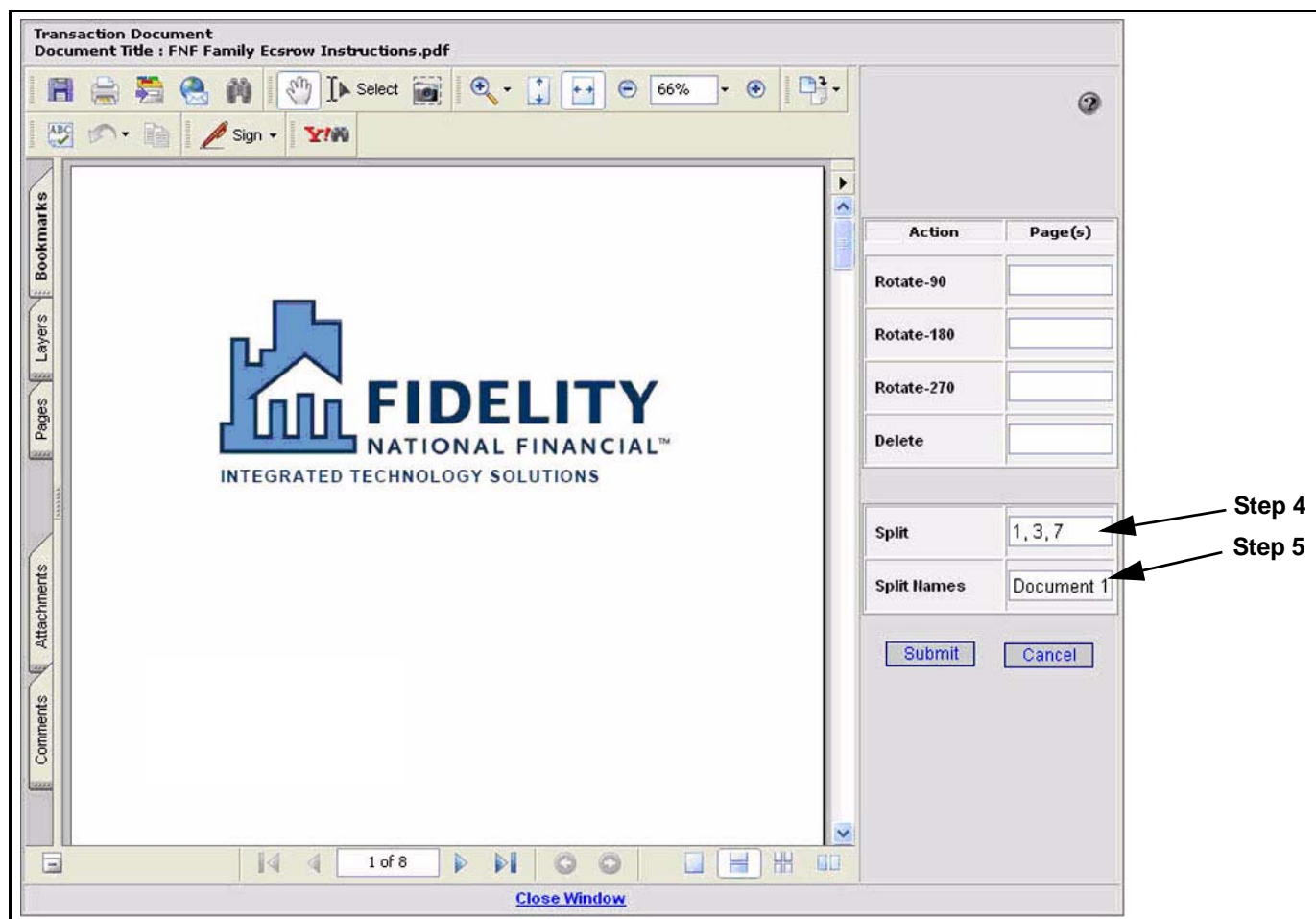
3. Click on the wrench icon.

---

**Note:** If you do not see the wrench icon, see *Including a Document Using the Upload Feature* on page 48.

---

The Document Split window appears



4. To split a document, indicate the separate documents you want by using a comma separator between page numbers. Each page you list will be the first page of each new document.

**Example:** You have an 8-page document. Pages 1-2 are a document; pages 3-6 are a document; pages 7-8 are a document. Keying in **1, 3, 7** will split the document as follows: Document 1 will include pages 1-2; document 2 will include pages 3-6; document 3 will include pages 7-8.

5. To name your documents, put the name of the first document followed by a comma, then the name of the next document followed by a comma, and so-on. **Example:** Document 1, Document 2, Document 3
6. Click **Submit**.

---

**Note:** You may also access the PDF splitting tool in the Transaction Documents section. See *Including a Document Using the Upload Feature* on page 48.

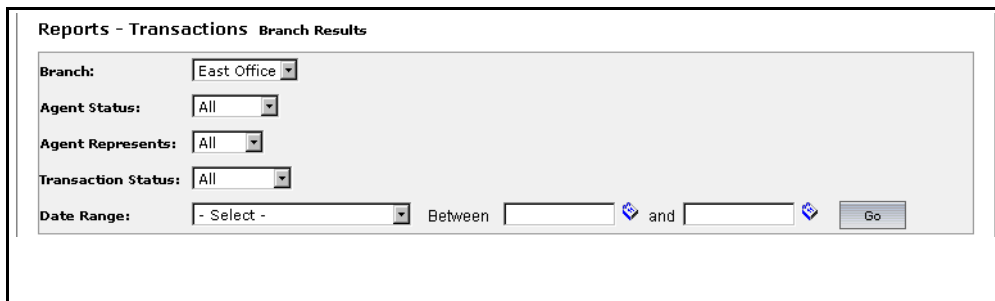
---

# Report Center

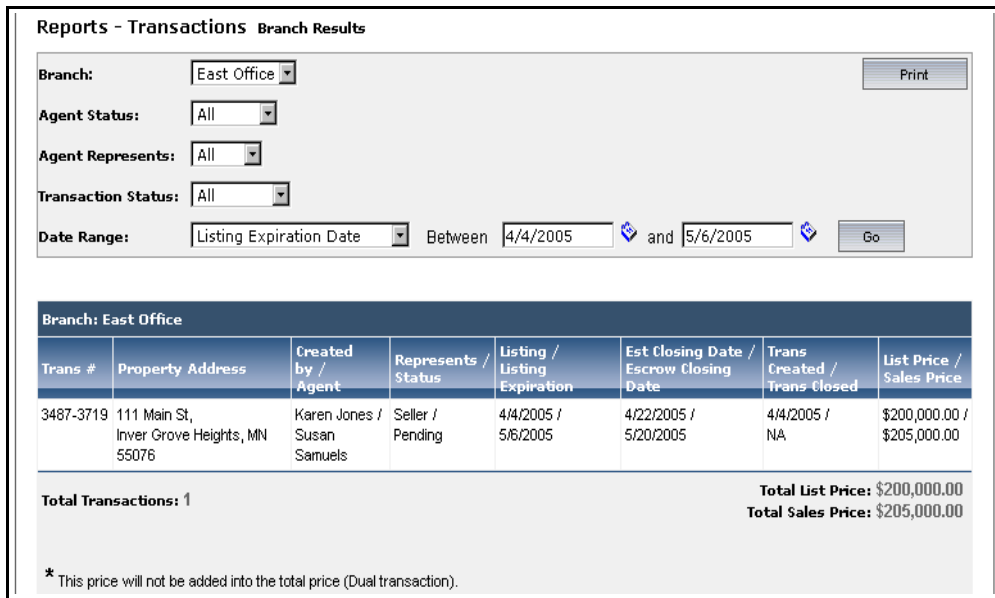
You can create Branch, Agent, Activity and Documents Received reports.

## Creating a Branch Results Report

1. Click the **Reports** tab.
2. Click **Branch Results**.



3. Select the **Branch**, **Agent Status**, **Agent Representation**, **Transaction Status**, and/or **Date Range**.
4. Click **Go**. The Branch report appears.



Trans #	Property Address	Created by / Agent	Represents / Status	Listing / Listing Expiration	Est Closing Date / Escrow Closing Date	Trans Created / Trans Closed	List Price / Sales Price
3487-3719	111 Main St, Inver Grove Heights, MN 55076	Karen Jones / Susan Samuels	Seller / Pending	4/4/2005 / 5/6/2005	4/22/2005 / 5/20/2005	4/4/2005 / NA	\$200,000.00 / \$205,000.00

**Total Transactions: 1**

**Total List Price: \$200,000.00**  
**Total Sales Price: \$205,000.00**

\* This price will not be added into the total price (Dual transaction).

Use the **Print** button to print the report.

# Creating an Agent Report

1. Click the **Reports** tab.
2. Click **Agent Results**.

Reports - Transactions By Agent

Agent Represents: All

Transaction Status: All

Date Range: - Select - Between and Go

3. Select the **Agent Representation**, **Transaction Status**, and/or **Date Range**.
4. Click **Go**. The Agent report appears.

Reports - Transactions By Agent

Agent Represents: Seller Print

Transaction Status: Pending

Date Range: Listing Expiration Date Between 5/2/2005 and 8/9/2005 Go

Branch: East Office

Agent	Trans ID	Property	Represents / Status	Listing / Listing Expiration	Estimated Closing Date / Escrow Closing Date	List Price / Sales Price
1. Susan Samuels	3487-3719	111 Main St Inver Grove Heights, MN 55076	Seller / Pending	4/4/2005 / 5/6/2005	4/22/2005 / 5/20/2005	\$200,000.00 / \$205,000.00
Total Transactions: 1					Total List Prices:	\$200,000.00
					Total Sales Prices:	\$205,000.00

\* This price will not be added into the total price (Dual transaction).

Use the **Print** button to print the report.

# Creating an Activity Report

1. Click the **Reports** tab.
2. Click **Activity Report**.

The screenshot shows the 'Activity Report' form in the TransactionPoint system. The top navigation bar includes 'Home | Mail' and 'FAQ | Help | Logout'. The main menu has tabs for 'Transactions', 'Orders', 'Properties', 'Contacts & Providers', 'Documents', 'Reports', and 'Profile & Preferences'. The 'Reports' tab is selected. The 'Activity Report' form contains the following fields:

- Branch:** All (dropdown)
- Agent Status:** Active (dropdown)
- Agent:** All (dropdown)
- Agent Represents:** All (dropdown)
- Transaction Status:** Pending (dropdown)
- Activity Description:** (text input)
- Activity Status:** Due/Past Due (dropdown) Between (date input) and (date input) [Go button]

3. Select the **Branch**, **Agent Status**, **Agent Representation**, **Transaction Status**, and/or **Date Range**.
4. Click **Go**. The Activity report appears.

The screenshot shows the 'Activity Report' results in the TransactionPoint system. The top navigation bar and menu are the same as in the previous screenshot. The 'Activity Report' form is filled out with the following values:

- Branch:** All
- Agent Status:** Active
- Agent:** Christian Gardner (Shaw Realty - TX)
- Agent Represents:** All
- Transaction Status:** All
- Activity Description:** (empty)
- Activity Status:** Due/Past Due

A 'Print Page' button is located in the top right corner of the form. Below the form, the report details are displayed:

**Branch Name: Shaw Realty - TX**  
**Coordinator: Terry Woodland**

Trans #	Represents Status	Listing Listing Expiration	Estimated Closing Date Escrow closing Date	Due	Completed
<b>Agent: Christian Gardner</b>					
4963-5172 for 5200 Everett Lane, Everett, WA 98204	Buyer Pending		8/17/2006		
Escrow Opened				7/8/2006	
Commission agreement attached				7/12/2006	
Copy of contract to lender				7/12/2006	
Earnest money attached/deposited				7/12/2006	
Survey requested/ordered				7/12/2006	
Intro Letter to buyer				7/14/2006	
Intro Letter to lender				7/14/2006	
Loan application submitted				7/14/2006	
Appraisal ordered				7/17/2006	
Confirm appraisal ordered by buyer				7/17/2006	
Appraisal verified				7/22/2006	
Home warranty ordered				7/22/2006	
Loan status				7/22/2006	

Use the **Print** button to print the report.



# Creating a Documents Received Report

- 1. Click the **Reports** tab.
- 2. Click **Documents Received Report**.

Home | Mail

Calendar | FAQ | Help | Logout

TransactionsOrdersPropertiesContacts & ProvidersDocumentsReportsProfile & Preferences

Documents Received Report

Report Type:

☒ Summary Report☐ Detailed Report

Date Range:

Between  and

Go

- 3. Select the **Report Type** (Summary or Detailed).
- 4. Enter the **Date Range**.
- 5. Click **Go**. The Documents Received report appears.

Home | Mail

Calendar | FAQ | Help | Logout

TransactionsOrdersPropertiesContacts & ProvidersDocumentsReportsProfile & Preferences

Documents Received Report

Report Type:

☒ Summary Report☐ Detailed Report

Date Range:

Between  and

Go

Branch	Transaction Coordinator	Transaction Documents	Order Documents
East Office	Karen Jones	57	5
Total Documents		57	5

Use the **Print** button to print the report.

# Profiles & Preferences

Use the **Profiles & Preferences** tab to modify your profile, change your password and view preferred providers

## Updating Your Profile

Use the **User Profile** function to update your personal information.

1. Click **Profile & Preferences** in the top navigation panel, then click **Profile**. Your **Staff Registration** page appears.

The screenshot displays the TransactionPoint Staff Registration page. It is divided into two main sections: **Personal Information** and **User Information**.

**Personal Information Section:**

- Salutation:** Ms. (dropdown)
- First Name:** Janet
- MI:** (empty)
- Last Name:** Moore
- Work Phone:** (818) 545-8975 \*
- Home Phone:** (818) 764-9821
- Pager:** (empty)
- PIN:** (empty) with Yes/No radio buttons
- Cell:** (818) 545-6800
- Domain:** (empty)
- Voice Mail:** (empty)
- Fax:** (empty)
- Example:** 18001234567
- A.K.A. First Name:** Jan
- A.K.A. Last Name:** Moore
- Website:** (empty)
- Email 1:** janetmoore@demotpo. A note states: "If email address (Email 1) is not specified, email will be sent to the system email account."
- Notify by:** Email (dropdown)
- Email 2:** (empty)
- Email 3:** (empty)
- Email 4:** (empty)
- Email 5:** (empty)
- Select box to send notifications to all emails:** (checkbox) with a note: "If unchecked, notification will only be sent to primary email (1)."
- Set new document privilege to:** Public (selected) / Private
- Enable Calendar:** (checkbox)
- Set default transaction tab to:** Summary / Contact / Activity (selected) / Log

**User Information Section:**

- User Id:** janetmoore
- Current Email:** janetmoore@demotpoint.com

At the bottom of the form are two buttons: **Prev** and **Finished**.

The footer of the page includes: **User:** Janet Moore, **v12.2**, **Copyright© 2002**, **Site Name:** philcomo, **TransactionPoint** logo, [Terms of Use](#), [Privacy Policy](#), and **Powered by Fidelity National Real Estate Solutions**.

2. Update any fields requiring changes, and select any check boxes according to your preference (i.e., check **Enable Calendar** if that is your preference). Fields marked with an asterisk (\*) are required.

## Adding Additional E-Mail Addresses

You can have up to five e-mail addresses. TransactionPoint can send e-mail messages, notifications, and alerts to each of these addresses. Email 1 is always treated as your primary e-mail address. E-mail messages will always be sent to Email 1. You have the option to have messages sent to other e-mail addresses.

To add additional e-mail addresses:

1. Enter the additional e-mail addresses you want to use.

2. Select the **Select box to send notifications....** check box to enable the sending of e-mail messages to all addresses.

The screenshot shows a form for email notification settings. It includes fields for Email 1, Email 2, Email 3, Email 4, and Email 5. A checkbox labeled 'Select box to send notifications to all emails' is checked. A note states: 'If email address (Email 1) is not specified, email will be sent to the system email account.' Another note states: 'If unchecked, notification will only be sent to primary email (1).'

When you enable multiple e-mail addresses an envelope icon appears next to your e-mail address on the Transaction Contacts page. This indicates to other users that you will receive e-mail messages at multiple locations. If you pause on this icon with your mouse all e-mail addresses are displayed.

The screenshot shows the Transaction Coordinator profile page. It displays contact information for Moore, Jan, including Home, Work, Cell, Fax, and Voice Mail numbers. The email address 'janetmoore@demotpoint.com' is highlighted, and a tooltip shows additional email addresses: 'janet\_moore@abcrealty.com' and 'jmoore101@aol.com'. Buttons for 'Edit', 'Create vCard', 'Add Co-Seller's Agent', and 'Change/Edit' are visible.

## Additional Information About E-Mail Messages

Note the following parameters for e-mail addresses:

- TransactionPoint will track the multiple e-mail addresses in the Communication Log.
- Letter Writer will display only the e-mail address entered for Email 1.
- VCard functionality will display only the e-mail address entered for Email 1.
- For CSV uploads additional e-mail addresses can be uploaded to TransactionPoint.

3. Click **Finished** when you are done entering updating your profile.

## Maintaining Preferred Providers

1. Click **User Preferred Providers**.

The screenshot shows the Transaction Center navigation menu. The 'Profile & Preferences' menu is open, and 'User Preferred Providers' is highlighted. Other options in the menu include 'User Profile', 'User Passwords', and 'User Packet Services'. The main content area shows a 'Submit a New Transaction' button and a 'Create Transaction' button.

2. Select a **Branch**.
3. Select an **Agent**.

4. Select a category from the **Inspection**, **Closing** or **Other Services** lists. The corresponding preferred providers appear.

The screenshot shows the 'Preferred Providers' section of the TransactionPoint application. At the top is a navigation bar with links for Home, Mail, Calendar, FAQ, Help, and Logout. Below this is a menu with tabs for Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, and Profile & Preferences. The 'Preferred Providers' section has a header and a form area. The form includes fields for Branch (East Office), Agent (Bill Baxter), and three service categories: Inspection (Select a service), Closing (Closing), and Other Services (Select a service). Below the form is a table of 'Other Providers' with three entries: Christopher Reeves, Sunny Day Escrow (Mira Loma); Gary Paul, USA Inspections; and Jeffrey M. Smith, Sunny Day Escrow (Mira Loma). Each entry has a 'Remove' button. At the bottom are 'Add Providers' and 'Suggest Providers' buttons.

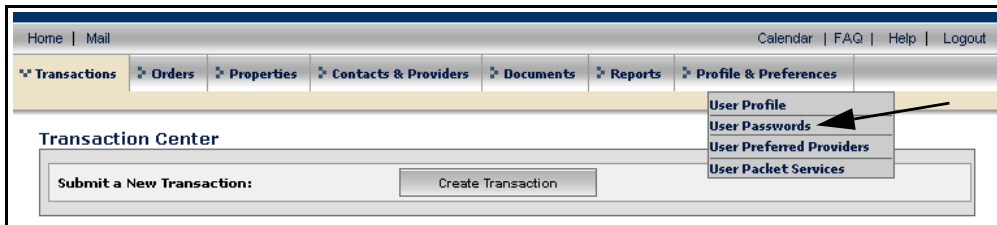
Preferred Providers		
Branch:	East Office	
Agent:	Bill Baxter	
Inspection	Closing	Other Services
Select a service	Closing	Select a service
<b>Other Providers</b>		
<a href="#">Christopher Reeves, Sunny Day Escrow (Mira Loma)</a>		<a href="#">Remove</a>
<a href="#">Gary Paul, USA Inspections</a>		<a href="#">Remove</a>
<a href="#">Jeffrey M. Smith, Sunny Day Escrow (Mira Loma)</a>		<a href="#">Remove</a>
<a href="#">Add Providers</a>		<a href="#">Suggest Providers</a>

5. Click on a provider for detailed information. Use the **Add Providers**, **Suggest Providers**, and **Remove** buttons, as needed.
6. Click **Close** to close the **Provider Detail** page.
7. After you obtain all needed provider information, click **Finished**.

# Changing Your Password

Use the **Password** feature to change your login password.

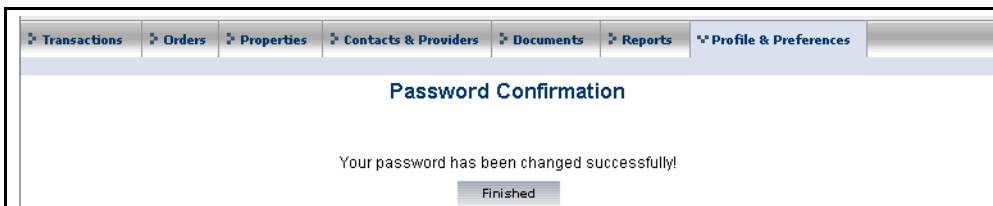
1. Click the **Profile & Preferences** tab.
2. Click **User Passwords**.



The **Change Password** page appears.

A screenshot of the 'Change Password' page in the TransactionPoint application. The page has a header with navigation links (Home, Mail, Calendar, FAQ, Help, Logout) and a main menu with tabs (Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, Profile & Preferences). The 'Change Password' section contains three input fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. To the right of these fields are 'Cancel' and 'Change' buttons. Below this is the 'Assist a TC Password' section, which includes a text box for a separate password and two input fields: 'New Password for Assist a TC Function Only:' and 'Confirm New Password for Assist a TC Function Only:'. To the right of these fields are 'Cancel' and 'Change' buttons.

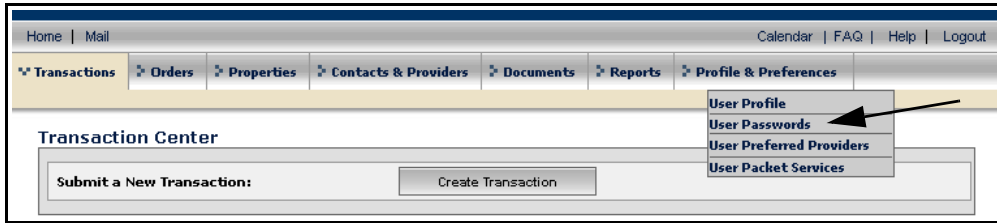
3. Type your **Old Password**.
4. Type your **New Password**.
5. Retype your new password in the **Confirm New Password** field.
6. Click **Change**. The **Password Confirmation** panel appears.



7. Click **Finished**.

# Setting Up an Assistant Password

1. Click the **Profile & Preferences** tab, and click on **User Passwords**.



The **Change Password** page appears.

A screenshot of the 'Change Password' page in the TransactionPoint web application. The top navigation bar is the same as the previous screenshot. The secondary navigation bar now shows the 'Profile & Preferences' tab as the active tab. The main content area is titled 'Change Password' and contains two sections. The first section, 'Change Password', has three input fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. Below these fields are 'Cancel' and 'Change' buttons. The second section, 'Assist a TC Password', has a descriptive text: 'Set up below a separate password which you can give to another Transaction Coordinator in you company to manage transactions for you in your absence.' Below this text are two input fields: 'New Password for Assist a TC Function Only:' and 'Confirm New Password for Assist a TC Function Only:'. Below these fields are 'Cancel' and 'Change' buttons.

2. Type a password in the **New Password for Assist a TC Function Only** field.
3. Retype the password in the **Confirm New Password** field.
4. Click **Change**. The **Password Confirmation** panel appears.

A screenshot of the 'Password Confirmation' panel in the TransactionPoint web application. The top navigation bar is the same as the previous screenshots. The secondary navigation bar shows the 'Profile & Preferences' tab as the active tab. The main content area is titled 'Password Confirmation' and contains a message: 'You have successfully set up a password specifically for other Transaction Coordinators in your company to manage the transactions for you in your absence. Please note that your password for login remains the same and has not been changed.' Below the message is a 'Finished' button.

5. Click **Finished**.

# Setting Up Packet Services

Packet Services are lists of the most frequently used providers used by Transaction Coordinators or agents. There are two types of packet services:

- **My Packet Services** are lists of your preferred providers.
- **Real Estate Agent Packet Services** are lists of agent-preferred providers.

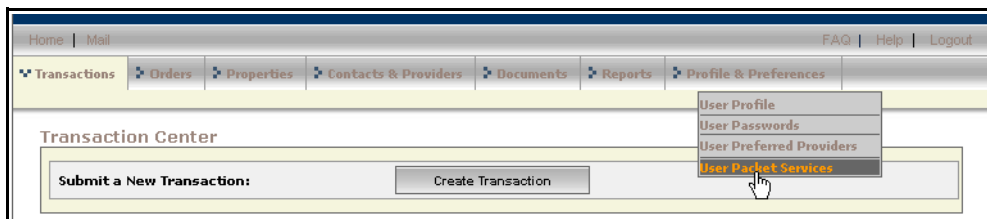
## Setting Up My Packet Services

These sections describe how to:

- Create a new list.
- Add a single provider from a service category.
- Add multiple providers from a service category.

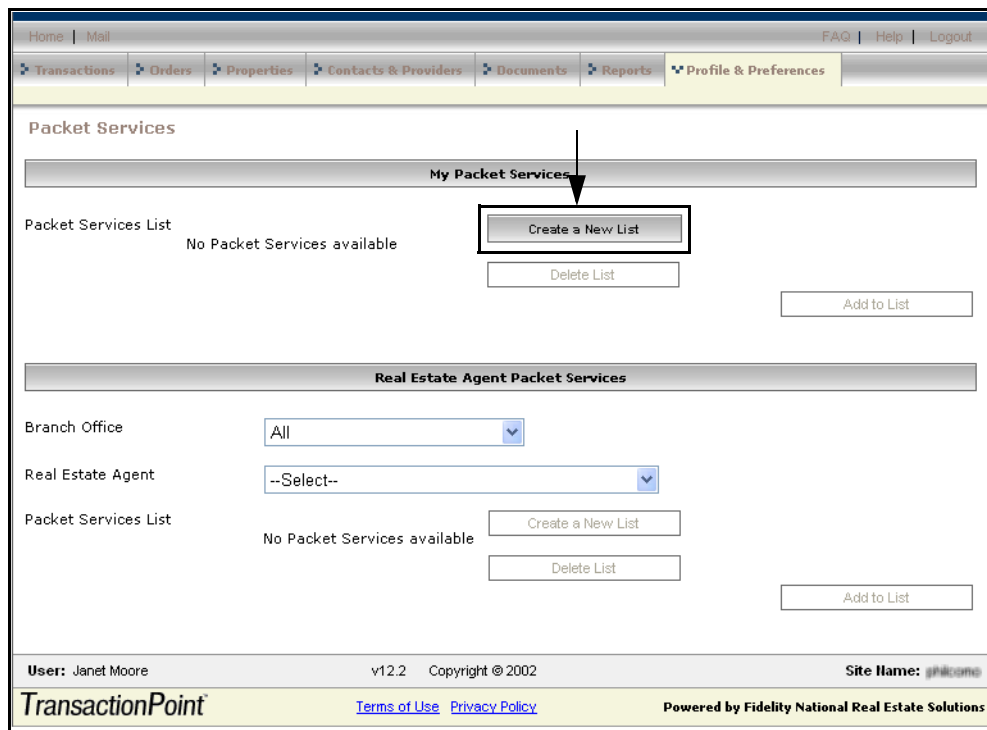
### Creating a New List

1. Click the **Profile & Preferences** tab, then click **User Packet Services**.



The **Packet Services** page appears.

2. Click **Create a New List**.



The **Create New Packet Services List** appears.

Create New Packet Services List

Add New Company Select Cancel

Name of List: KAnderson - Residential

Contact Type: APPRAISAL

Providers: Show All

Search for: Company Name San Gabriel

Search

Add New Company Select Cancel

3. In the **Name of List** text box, enter a name. This is the packet services name to look for when adding the packet to your transaction.

---

**Note:** When you create a new list you must also add your first servicer provider. To add a service provider see the section Adding a Single Provider. Begin with step 2.

---

## Adding a Single Provider for a Service Category

1. Select the packet from the **Packet Services List** and click **Add to List**.

Packet Services

My Packet Services

Packet Services List: Residential Service Providers

Create a New List

Delete List

Contact Type: Appraisal

Contact Info: Dave Scott - San Gabriel Appraisers Remove

Add to List

2. In the window for adding a provider, enter your search criteria:
  - Select the service category from the **Contact Type** list.
  - Select either **Show Preferred Only** or **Show All** from the **Providers** list.
  - Select the **Search for** criteria. If you select **First Name**, **Last Name**, or **Company Name** you can enter either a



partial or full entry in the adjacent text box.

The screenshot shows a window titled "Add Provider to Existing Packet Services List". At the top, there are three buttons: "Add New Company", "Select", and "Cancel". Below this, the "Name of List:" is "Residential Service Providers". The "Contact Type:" is a dropdown menu set to "CLOSING". The "Providers:" is a dropdown menu set to "Show All". The "Search for:" is a dropdown menu set to "Company Name" with a text box containing "Eagle Rock Valley Closing". A "Search" button is to the right of the text box. At the bottom, there are three buttons: "Add New Company", "Select", and "Cancel".

3. Click **Search**. From the list of providers displayed, choose a contact by selecting the option button for that name, then click **Select**. If only one contact appears, you still need to select the option button for that contact before clicking **Select**.

The screenshot shows a window titled "Create New Packet Services List". At the top, there are three buttons: "Add New Company", "Select", and "Cancel". Below this, the "Name of List:" is "KAnderson - Residential". The "Contact Type:" is a dropdown menu set to "APPRAISAL". The "Providers:" is a dropdown menu set to "Show All". The "Search for:" is a dropdown menu set to "Company Name" with a text box containing "San Gabriel". A "Search" button is to the right of the text box. Below the search bar, there is a table with the following data:

Company	Branch	Contact(s)
San Gabriel Appraisers	San Gabriel Appraisers 1514 South California Ave. Monrovia, CA 91016	Dave Scott ▲

Below the table, there are three buttons: "Add Branch", "Add Contact", and "Select". The "Select" button is highlighted with a black box. Below the buttons, there is a legend:

- ★ Indicates "Preferred Provider"
- ✓ Indicates "Agent Preferred"
- ▲ Indicates "My Packet Services"
- Indicates "Agent's Packet Services"

At the bottom, there are three buttons: "Add New Company", "Select", and "Cancel".

---

**Note:** If the provider you want is not found, you can add it to your list by clicking **Add New Company** and entering the company's information in the Add Company - TC window.

---

## Adding Multiple Providers for a Service Category

Note that these steps assume that a packet services list has already been created.

1. Select a packet from the **Packet Services List** and click **Add to List**.

2. In the window for selecting a provider, enter your search criteria:

- Select the service category from the **Contact Type** list.
- Select either **Show Preferred Only** or **Show All** from the Providers list.
- Select the Search For criteria. If you select First Name, Last Name, or Company Name you can enter either a partial or full entry in the adjacent text box.
  - If you select **All** leave the text box empty.

**Add Provider to Existing Packet Services List**

Add New Company Select Cancel

Name of List: Residential Service Providers

Contact Type: HOME WARRANTY

Providers: Show All

Search for: All

Search

Add New Company Select Cancel

- Click **Search**. From the list of providers displayed, choose a contact by selecting the option button for that name, then click **Select**. If only one contact appears, you still need to select the option button for that contact before clicking **Select**.

**Add Provider to Existing Packet Services List**

Add New Company Select Cancel

Name of List: Residential Service Providers

Contact Type: CLOSING

Providers: Show All

Search for: All

Search

**Contacts**

Company	Branch	Contact(s)
College Escrow	College Escrow 9812 Stanford Dr. Claremont, CA 91711	<input type="radio"/> Elizabeth Knoll
Eagle Rock Valley Closing	Eagle Rock Valley Closing 10764 Eagle Rock Blvd. Los Angeles, CA 90041	<input checked="" type="radio"/> Clem Roberts

Add Branch Add Contact Select

Add Branch Add Contact Select

3. Repeat these steps to add the next provider for that category.

After completing these steps, the packet services list will display the multiple providers selected for that category.

The screenshot shows a web interface titled "Packet Services". At the top, there's a header "My Packet Services". Below it, a dropdown menu is set to "Residential Service Providers", with buttons for "Create a New List" and "Delete List". A list of providers is displayed, each with a "Contact Type" and "Contact Info", and a "Remove" button. The providers listed are:

- Contact Type: Appraisal  
Contact Info: Dave Scott - San Gabriel Appraisers
- Contact Type: Escrow  
Contact Info: Clem Roberts - Eagle Rock Valley Closing
- Contact Type: Escrow  
Contact Info: Elizabeth Knoll - College Escrow

An "Add to List" button is located at the bottom right of the list.

## Setting Up Real Estate Agent Packet Services

These sections describe how to do the following for an agent's packet services list:

- Create a new list.
- Add a single provider from a service category.
- Add multiple providers from a service category.

### Creating a New List

1. Click the **Profile & Preferences** tab, then click **User Packet Services**.

The screenshot shows the TransactionPoint user interface. The top navigation bar includes links for Home, Mail, FAQ, Help, and Logout. Below this, a series of tabs are visible: Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, and Profile & Preferences. The 'Profile & Preferences' tab is selected, and a dropdown menu is open, showing options: User Profile, User Passwords, User Preferred Providers, and User Packet Services. A mouse cursor is pointing at 'User Packet Services'. Below the tabs, there's a section titled 'Transaction Center' with a 'Submit a New Transaction:' label and a 'Create Transaction' button.

The **Packet Services** page appears.

Home | Mail | FAQ | Help | Logout

Transactions | Orders | Properties | Contacts & Providers | Documents | Reports | Profile & Preferences

### Packet Services

#### My Packet Services

Packet Services List

No Packet Services available

Create a New List

Delete List

Add to List

#### Real Estate Agent Packet Services

Branch Office: All

Real Estate Agent: --Select--

Packet Services List

No Packet Services available

Create a New List

Delete List

Add to List

User: Janet Moore v12.2 Copyright © 2002 Site Name: gphicome

TransactionPoint Terms of Use Privacy Policy Powered by Fidelity National Real Estate Solutions

1. In the Real Estate Agent Packet Services section:

- Select the branch office from the **Branch Office** list.
  - If your access is a single branch only, that branch automatically appears in the Branch Office list.
  - If your access is to multiple branches, **All** appears in the Branch Office list. You can leave this selection unchanged or select a specific branch.
- Select an agent from the **Real Estate Agent** list.

---

**Note:** Your branch office selection governs the agents appearing in this list.

---

2. Click **Create a New List**.

Real Estate Agent Packet Services

Branch Office: ABC Realty - Glendale Branch

Real Estate Agent: Karen Anderson

Packet Services List

No Packet Services available

Create a New List

Delete List

Add to List

The **Create New Packet Services List** appears.

Create New Packet Services List

Add New Company Select Cancel

Name of List: KAnderson - Residential

Contact Type: APPRAISAL

Providers: Show All

Search for: Company Name San Gabriel Search

Add New Company Select Cancel

3. In the **Name of List** text box, enter a name. This is the packet services name to look for when adding the packet to the agent's transaction.

---

**Note:** When you create a new list for an agent you must also add the first service provider. To add a service provider see the section Adding a Single Provider for a Service Category. Begin with step 2.

---

## Adding a Single Provider for a Service Category

1. In the **Branch Office**, **Real Estate Agent**, and **Packet Services** lists, make the appropriate selections to locate the packet service you are looking for. Click **Add to List**.
2. In the window for adding a provider, enter your search criteria:
  - Select the service category from the **Contact Type** list.
  - Select either **Show Preferred Only** or **Show All** from the **Providers** list.
  - Select the **Search for** criteria. If you select **First Name**, **Last Name**, or **Company Name** you can enter either a partial or full entry in the adjacent text box.

Create New Packet Services List

Add New Company Select Cancel

Name of List: KAnderson - Residential

Contact Type: APPRAISAL

Providers: Show All

Search for: Company Name San Gabriel Search

Add New Company Select Cancel

3. Click **Search**. From the list of providers displayed, choose a contact by selecting the option button for that name, then click **Select**. If only one contact appears, you still need to select the option button for that contact before clicking

## Select.

Create New Packet Services List

Add New Company Select Cancel

Name of List: KAnderson - Residential

Contact Type: APPRAISAL

Providers: Show All

Search for: Company Name San Gabriel

Search

Company	Branch	Contact(s)
San Gabriel Appraisers	San Gabriel Appraisers 1514 South California Ave. Monrovia, CA 91016	Dave Scott ▲

Add Branch Add Contact Select

★Indicates "Preferred Provider"  
✓Indicates "Agent Preferred"  
▲Indicates "My Packet Services"  
●Indicates "Agent's Packet Services"

Add New Company Select Cancel

**Note:** If the provider you want is not found, you can add it to your list by clicking **Add New Company** and entering the company's information in the Add Company - TC window.

## Adding Multiple Providers for a Service Category

Note that these steps assume that a packet services list has already been created.

1. Select the branch office, real estate agent, and packet service from the lists. Click **Add to List**.

Real Estate Agent Packet Services

Branch Office: ABC Realty - Glendale Branch

Real Estate Agent: Karen Anderson

Packet Services List: KAnderson - Residential

Create a New List Delete List

Contact Type: Appraisal

Contact Info: Dave Scott - San Gabriel Appraisers Remove

Add to List

2. In the window for selecting a provider, enter your search criteria:
  - Select the service category from the **Contact Type** list.
  - Select either **Show Preferred Only** or **Show All** from the Providers list.
  - Select the **Search For** criteria. If you select **First Name**, **Last Name**, or **Company Name** you can enter either a partial or full entry in the adjacent text box.

- If you select **All** leave the text box empty.

**Add Provider to Existing Packet Services List**

Add New Company    Select    Cancel

Name of List: KAnderson - Residential

Contact Type: HOME WARRANTY

Providers: Show All

Search for: All

Search

Add New Company    Select    Cancel

- Click **Search**. From the list of providers displayed, choose a contact by selecting the option button for that name, then click **Select**.

**Add Provider to Existing Packet Services List**

Add New Company    Select    Cancel

Name of List: KAnderson - Residential

Contact Type: HOME WARRANTY

Providers: Show All

Search for: All

Search

**Contacts**

Company	Branch	Contact(s)
Home Warranty Services	Home Warranty Services 1425 East Foothill Blvd. Glendora, CA 91741	<input type="radio"/> Josh McMannis ↓ <input type="button" value="Select"/>
Warranty Services	Warranty Services 2543 Foothill Blvd. Claremont, CA 91711	<input type="radio"/> Jim Augustino  <input type="button" value="Select"/>

Add Branch    Add Contact    Select

★Indicates "Preferred Provider"  
✓Indicates "Agent Preferred"  
▲Indicates "My Packet Services"  
●Indicates "Agent's Packet Services"

Add New Company    Select    Cancel

3. Repeat these steps to add the next provider for that category.

After completing these steps, the packet services list will display the multiple providers selected for that category.

Real Estate Agent Packet Services

Branch Office

ABC Realty - Glendale Branch

Real Estate Agent

Karen Anderson

Packet Services List

KAnderson - Residential

Create a New List

Delete List

Contact Type: Appraisal

Contact Info: Dave Scott - San Gabriel Appraisers

Remove

Contact Type: Home Warranty

Contact Info: Josh McMannis - Home Warranty Services

Remove

Contact Type: Home Warranty

Contact Info: Jim Augustino - Warranty Services

Remove

Add to List

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# Mail Center

From the **Mail Center**, you can view and send mail. This email system is a basic email system designed for your use within TransactionPoint.

1. Click **Mail** in the top navigation toolbar.

Home | Mail | Calendar | FAQ | Help | Logout

Transactions Orders Properties Contacts & Providers Documents Reports Profile & Preferences

**Transaction Center**

Submit a New Transaction:

(or) Find Existing Transaction: (choose 1 or all fields to search)

Transaction Coordinator: Jones, Karen

Branch:  Agent: (\* InActive Agents)

Agent Represents:  Status:  With:

Other Filters:

The **Mailbox Summary** page appears.

Compose ReadMail Summary Search Help

**Mailbox Summary**

Mailbox	Size (bytes)	Message Count	Last Modified
<a href="#">Main</a>	2029	1/0	2006-07-18 13:27
<a href="#">Sent</a>	14175	6	2006-07-18 13:30
Deleted	0	0	
<a href="#">[attachments]</a>			

Current Mailbox: Main User: karalie\_shaw

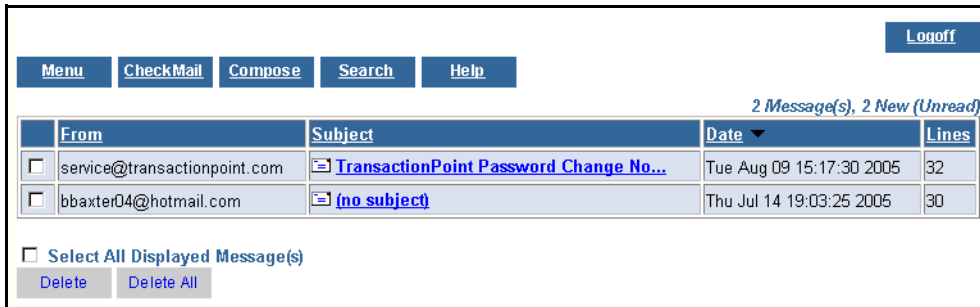
**Options**

**Personal**

- [Change Mail Forwarding Information](#)
- [Change Vacation Message](#)
- [Address Book](#)
- [Auto Response](#)
- [Preferences](#)
- [Change Signature](#)

# Viewing Your Messages

1. Access the **Mailbox Summary** page.
2. Click the **Main** link.



3. Click on the message **Subject** to read the message.

# Deleting Messages

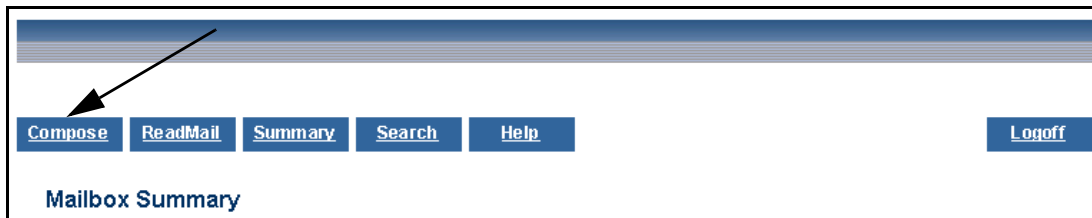
**Note:** The deletion of messages is immediate and no confirmation panel appears.

1. Access the **Mailbox Summary** page.
2. To delete all messages, click **Delete All**.
3. Select the check box in front of a message(s) you want to delete.
4. Click the **Delete** button.

# Composing and Sending a Message

The function of sending an email message is labeled **Compose**.

1. Access the **Mailbox Summary** page.
2. Click **Compose** on the **Main Menu** or on the unread message panel.



The **Send Mail Message** page appears.

**Send Message** [Logout](#)

[Menu](#) [Summary](#) [Compose](#) [Search](#) [Help](#)

**Addresses:** —No Addresses— [To](#) [CC](#) [BCC](#)

**To:**

**CC:**

**BCC:**

**Subject:**

☐ Add all recipients to address book ☐ Save message in Sent folder ☐ Include Signature

[Save](#) [Send](#)

**Attachments**  
Click on the **Browse** button to select the file you want to attach or type the path and name of the file into the box below. To attach file(s), click on **Attach** Button. To remove attachments, select a file(s) in the list and click the **Remove** button.

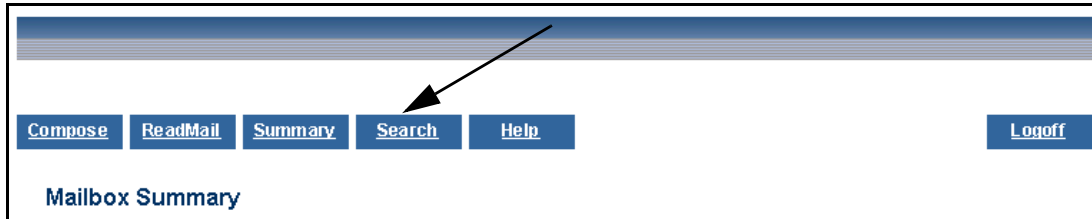
**AttachFile:**  [Browse...](#) —No Files Attached— [Attach](#) [Remove](#)

**Current Total:**  
0 Kbytes, 0 File(s)

3. Type the email address of the message recipients in the **To** field, the **CC** field, and/or the **BCC** field.
4. Type the **Subject**.
5. Select **Add all recipients to address book** if you want to add all the recipients listed to your Mail Address Book,.
6. Select **Save message in Sent folder** if you want to keep a copy of the outgoing message.
7. Select **Include Signature** if you want your mail signature sent with the message.
8. Type the body of the message in the field below the **Subject** field.
9. To attach a file:
  - a. Click the **Browse** button and locate the file.
  - b. Click the **Attach** button.
  - c. To remove an added attachment, select that file in the **List of Files Attached** field, and click **Remove** to disconnect the file from the message.
10. Click **Send**. The message and any attachments are sent to all recipients.

# Searching for Mail

1. Access the **Mailbox Summary** page.
2. Click **Search**.



The **Search Mailbox** screen appears.

A screenshot of the 'Search Mailbox' screen. At the top, there is a navigation bar with buttons for 'Menu', 'CheckMail', 'Compose', and 'Help'. A 'Logoff' button is in the top right corner. Below the navigation bar, the text 'Last Search' is displayed. A paragraph explains that you can search for a mail message by sender, recipient, subject, or message body. A note states: 'Note: Multiple word entries are considered phrases. Do not enclose the entries in quotes.' Below this is a 'Find Messages' section with a text input field for 'Enter the word or phrase that you want to search for:'. There is a checkbox for 'Case Sensitive Search'. Under 'Search in area:', there are radio buttons for 'To', 'From', 'Subject', and 'Message Body (Excluding attachment(s), if any)'. Under 'Search By Folder(s):', there is a text input field with 'Main' entered. At the bottom, there is a checkbox for 'Select All Mailboxes' and two buttons: 'Search' and 'Cancel'.

3. Enter the search criteria and click **Search** to locate the mail message.

# Changing Mail Forwarding Information

1. Access the **Mailbox Summary** page.
2. Click **Change Mail Forwarding Information**. The **Change Forward** screen appears.

**Change Forward** [Logoff](#)

[Menu](#) [CheckMail](#) [Compose](#) [Help](#)

This file causes all your mail to be sent to the address specified. This feature is disabled if the text box is empty. Make your changes and press save.

[Save](#)

User:ssamuels

3. Type the forwarding email address and click **Save**.

# Changing Your Mail Vacation Address

1. Access the **Mailbox Summary** page.
2. Click **Change Vacation Address**. The **Change Vacation Message** screen appears.

**Change Vacation Message** [Logoff](#)

[Menu](#) [CheckMail](#) [Compose](#) [Help](#)

This message will be sent once to each user that sends you mail and is limited to 1000 characters. This feature is disabled if the text box is empty. Make your changes and press save.

[Save](#)

User:ssamuels

3. Type your vacation message and click **Save**.

# Changing Your Mail Address Book

1. Access the **Mailbox Summary** page.
2. Click **Address Book**. The **Address Book** screen appears.

**Address Book**

MenuCheckMailComposeHelp

Logoff

**Add Address**

Enter New Name:

Enter New Email Address:

Add

**Modify Address Book**

To Modify/Delete an existing Address entry, select it from the list to the left.  
Then click on the **Modify/Delete** button.

*Current Addresses:*

—No Addresses—

Modify User Name:

Modify User Address:

ModifyDelete

User:ssamuels

3. **Add, modify, or delete** your address book entries.

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# Changing Your Mail Auto Response

1. Access the **Mailbox Summary** page.
2. Click **Auto Response**. The **Auto Response** screen appears.

**Auto Response** Logout

[Menu](#) [CheckMail](#) [Compose](#) [Help](#)

**Auto Response (Per Mailbox)**

Mailbox:  
Main

After responding, forward mail to:

Message:

The first line of message is used as the subject line for automated response. It must be less than 80 characters long. After selecting a mailbox, press **Update** to view current autoresponse message. Press **Save** to update autoresponse message. This message will be sent once to each user that sends you mail and is limited to 1024 characters. This feature is disabled if the text box is empty. **Forward Mail** UserID must be between 3 and 30 characters long.

3. Type your auto response message and click **Save**.

# Changing Your Mail Preferences

1. Access the **Mailbox Summary** page.
2. Click **Preferences**. The **Change Preferences** screen appears.

Change Preferences

MenuCheckMailComposeHelp

Logoff

Mail Sending Options

Forward Editing: ☒ Edit original message  
☐ Don't edit original message  
Forward Attachments: ☐ Include attachments  
☒ Don't include attachments  
Replying: ☒ Include original message  
☐ Don't include original message  
Reply message (original message indicator): ☒ ">" ☐ None  
Save copy of outgoing mail in Sent folder: ☒ No ☐ Yes  
Include Signature: ☒ No ☐ Yes  
Confirm sent messages: ☐ No ☒ Yes

Message Display Options

Number of messages per page: ☒ 10 ☐ 20 ☐ 50 ☐ 100  
Initial sort criteria: ☐ From  
☐ Subject  
☒ Date  
☐ Number of lines  
Sort Messages: ☐ Ascending ☒ Descending  
Display Message Headers: ☒ Basic ☐ Full  
Text attachments: ☒ Show as links  
☐ Show with message text  
Menu buttons in read message screen: ☐ Top  
☒ Bottom  
☐ Both  
Show new messages for: ☒ Main mailbox only  
☐ All mailboxes  
MessagePreview: ☐ Enable Preview  
Preview Size:  (Max. 128 Characters)

Delete Options

Delete messages: ☐ Move to delete folder  
☒ Purge message  
Confirm delete messages: ☐

Save

User:ssamuels

3. Change your preferences, as appropriate, and click **Save**.



# Changing Your Mail Signature

1. Access the **Mailbox Summary** page.
2. Click **Change Signature**. The **Change Signature** screen appears.

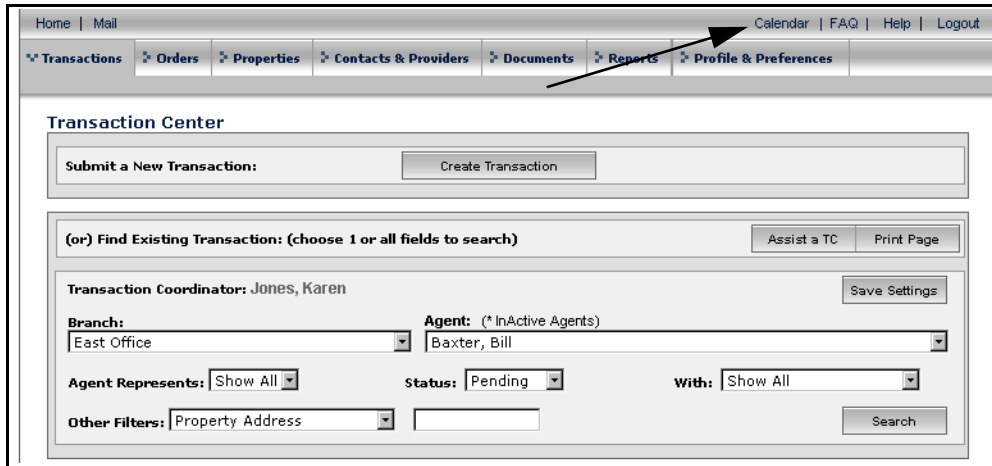


The screenshot shows a web application titled "Change Signature". At the top left, there is a navigation bar with buttons for "Menu", "CheckMail", "Compose", and "Help". At the top right, there is a "Logoff" button. Below the navigation bar, a message states: "This file will be sent as a signature at the end of all your messages and is limited to 1000 characters." Below this message, there is a prompt: "Make your changes and press Save". Underneath the prompt is a large, empty text input area. At the bottom right of the text area, there is a "Save" button. In the bottom right corner of the entire interface, the text "User:ssamuels" is displayed.

3. Enter the information and click **Save**.

# Calendar

To access the Calendar, click **Calendar** in the top navigation toolbar.



Home | Mail | Calendar | FAQ | Help | Logout

Transactions Orders Properties Contacts & Providers Documents Reports Profile & Preferences

Transaction Center

Submit a New Transaction:

(or) Find Existing Transaction: (choose 1 or all fields to search)

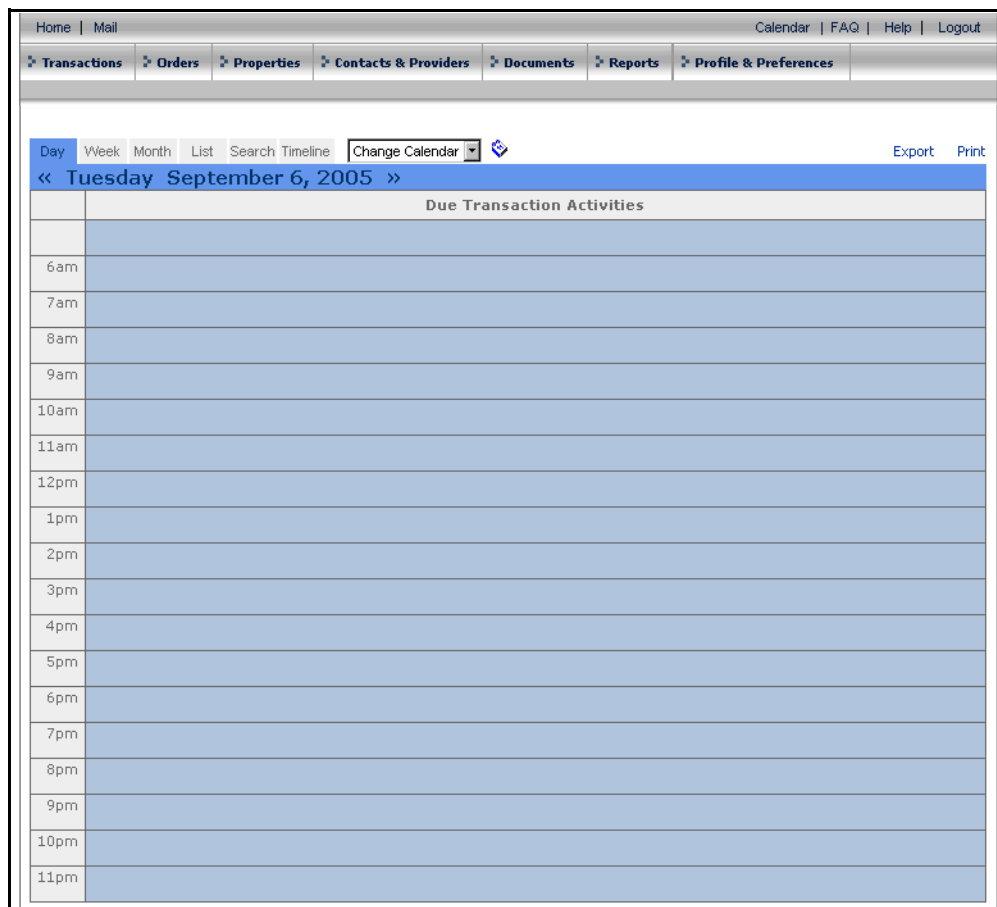
Transaction Coordinator: Jones, Karen

Branch:  Agent: (\* InActive Agents)

Agent Represents:  Status:  With:

Other Filters:

The **Calendar** screen appears.



Home | Mail | Calendar | FAQ | Help | Logout

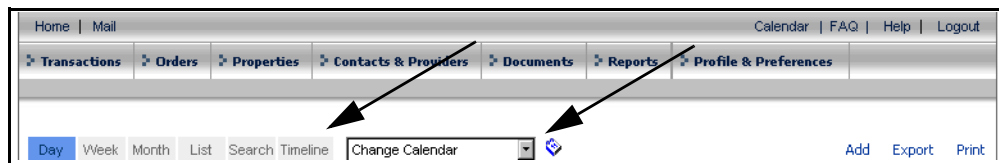
Transactions Orders Properties Contacts & Providers Documents Reports Profile & Preferences

Day Week Month List Search Timeline

« Tuesday September 6, 2005 »

Due Transaction Activities	
6am	
7am	
8am	
9am	
10am	
11am	
12pm	
1pm	
2pm	
3pm	
4pm	
5pm	
6pm	
7pm	
8pm	
9pm	
10pm	
11pm	

Use the Day, Week, Month, List and Timeline buttons to change the calendar view. Use the **Change Calendar** list to switch between **Due Transaction Activities** and **My Calendar**.



## Adding an Event

**Note:** You can only schedule items using **My Calendar**.

1. Click **Add**. The **New Event** page appears.

2. Complete the **Event** fields.
3. Click **OK** to add the event. The calendar reappears showing the event added.

## Editing an Event

1. Click on the event you want to edit. The **Event Details** screen appears.

2. Click **Edit**.
3. Edit the event fields, as needed.
4. Click **OK**.

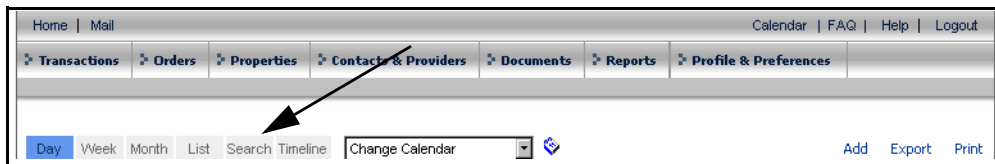
## Deleting an Event

1. Click on the event you want to delete. The **Event Details** screen appears.

2. Click **Delete**. A confirmation screen appears.
3. Click **OK**.

## Searching the Calendar

1. Click **Search** at the top of the calendar.



The **Calendar Search** page appears.

The screenshot shows the 'Calendar Search' page. It features a search form with the following fields:

- From:** August 6, 2005
- To:** September 6, 2005
- Calendar:** All Calendars
- Keyword:** (empty text box)
- Sort By:** Date

There is a 'Submit' button at the bottom right of the form. The top navigation bar and tabs are the same as in the previous screenshot.

2. Enter the search criteria.
3. Click **Submit**. The page refreshes to show events that match your criteria.

The screenshot shows the 'Calendar Search' results page. The search criteria are displayed at the top: 'Searched for: All Calendars; Sep 1, 2005 - Sep 6, 2005; Sort By: Date'. A 'Search Again' button is located to the right of the search criteria. Below the search criteria is a table with the following data:

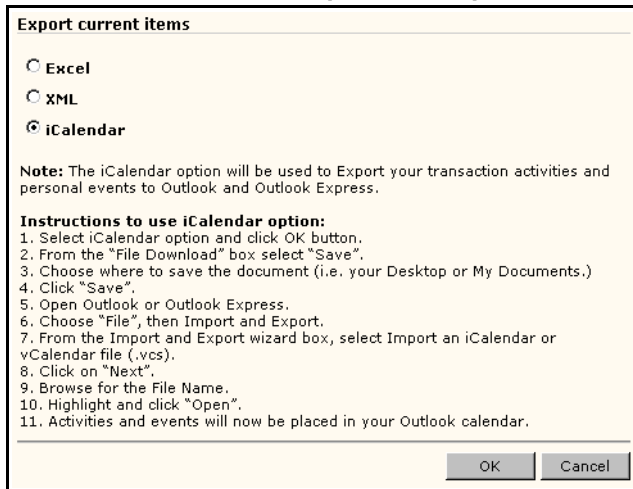
From	To	Duration	Calendar	Title/Description
Sun, Sep 4	Mon, Sep 5	1 day	Due Transaction Activities	3707-3935: 801 S Lyon St 6, Santa Ana, CA 92705 (Activity Due) Activities Due: ~ E-03 Termite Clearance ~ E-08 Final Walk-through

The top navigation bar and tabs are the same as in the previous screenshots.

# Exporting Calendar Entries

You can export transaction activities and personal events to Microsoft Excel<sup>®</sup>, XML or iCalendar format. Use the iCalendar format to export to Microsoft Outlook<sup>®</sup> or Outlook Express<sup>®</sup>.

1. In the Calendar, click **Export**. The **Export current items** page appears.



**Export current items**

☐ Excel

☐ XML

☒ iCalendar

**Note:** The iCalendar option will be used to Export your transaction activities and personal events to Outlook and Outlook Express.

**Instructions to use iCalendar option:**

1. Select iCalendar option and click OK button.
2. From the "File Download" box select "Save".
3. Choose where to save the document (i.e. your Desktop or My Documents.)
4. Click "Save".
5. Open Outlook or Outlook Express.
6. Choose "File", then Import and Export.
7. From the Import and Export wizard box, select Import an iCalendar or vCalendar file (.vcs).
8. Click on "Next".
9. Browse for the File Name.
10. Highlight and click "Open".
11. Activities and events will now be placed in your Outlook calendar.

OK Cancel

2. Select the format.
3. Click **OK**.
4. Click **Save**.
5. Select where you want to save the file.
6. Click **Save**.

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