TransactionPoint®

Transaction Coordinator's Guide

FIDELITY®
NATIONAL REAL ESTATE SOLUTIONS

Fidelity National Real Estate Solutions, LLC
601 Riverside Avenue
Jacksonville, FL 32204
www.realestate.fnf.com

Contents

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:

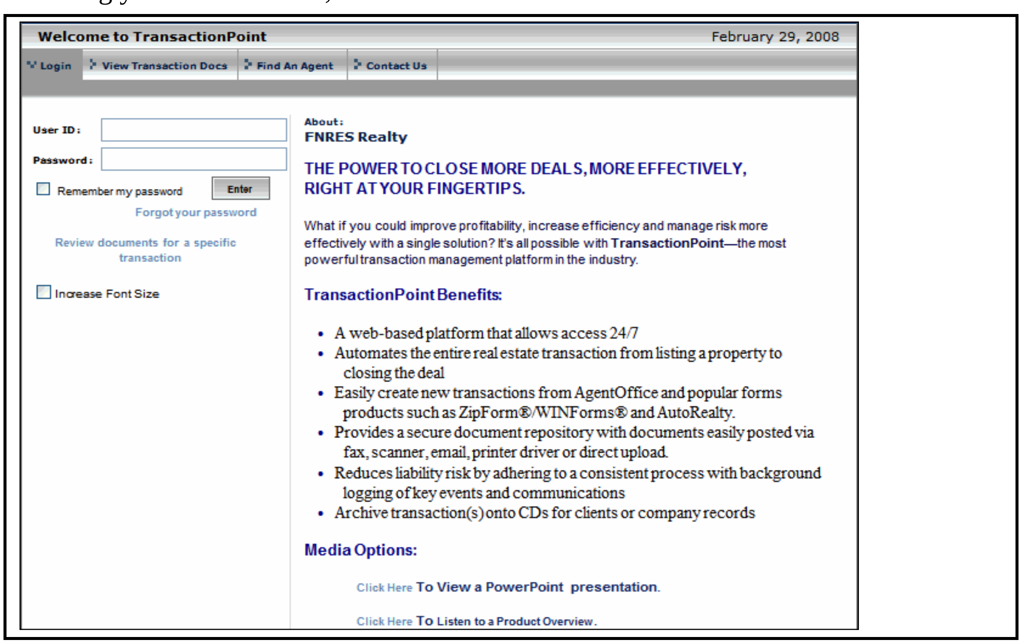
- Add properties for agents
- Associate clients with properties
- Create new transactions for properties
- Update transactions
- Place and review orders for transactions
- Upload documents for a property

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.



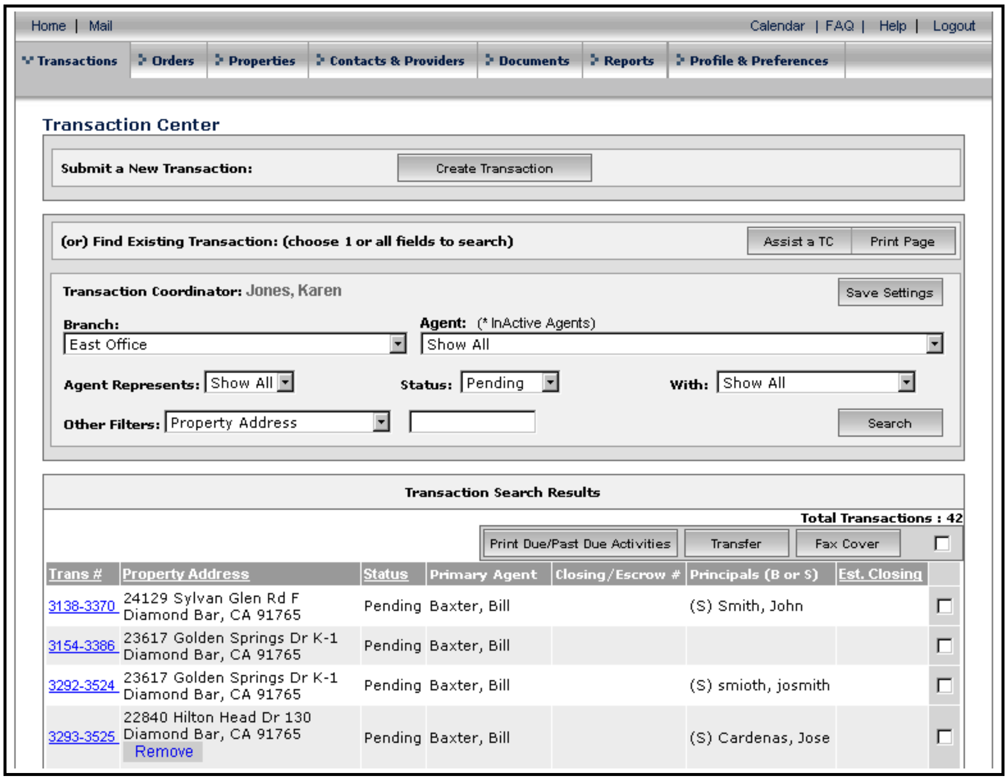
2. Type your **User ID**.

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.



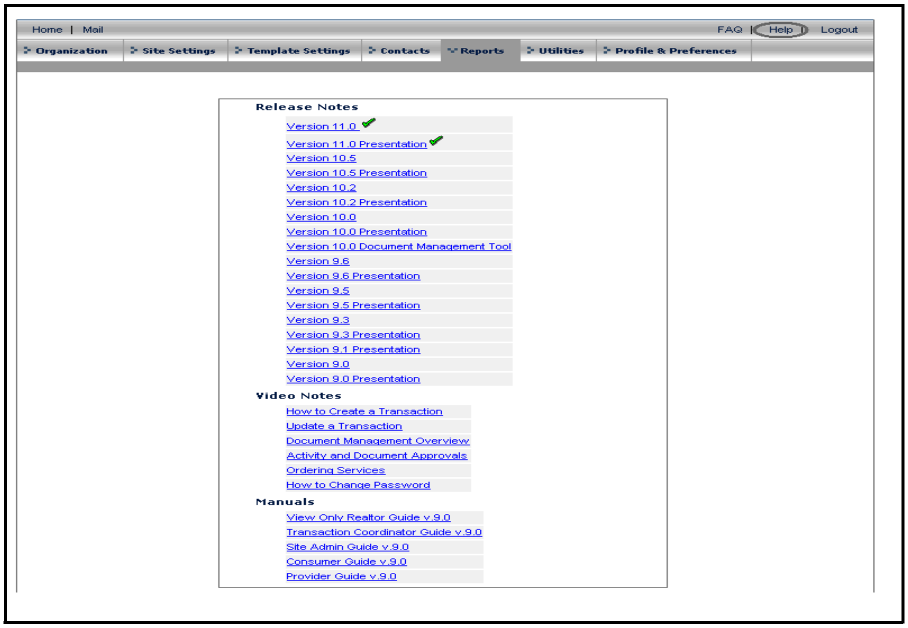
Logging Out

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

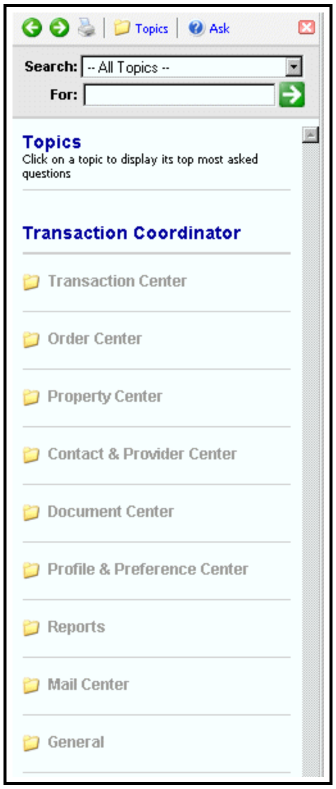
2. Click **OK**.

Getting Help

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



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

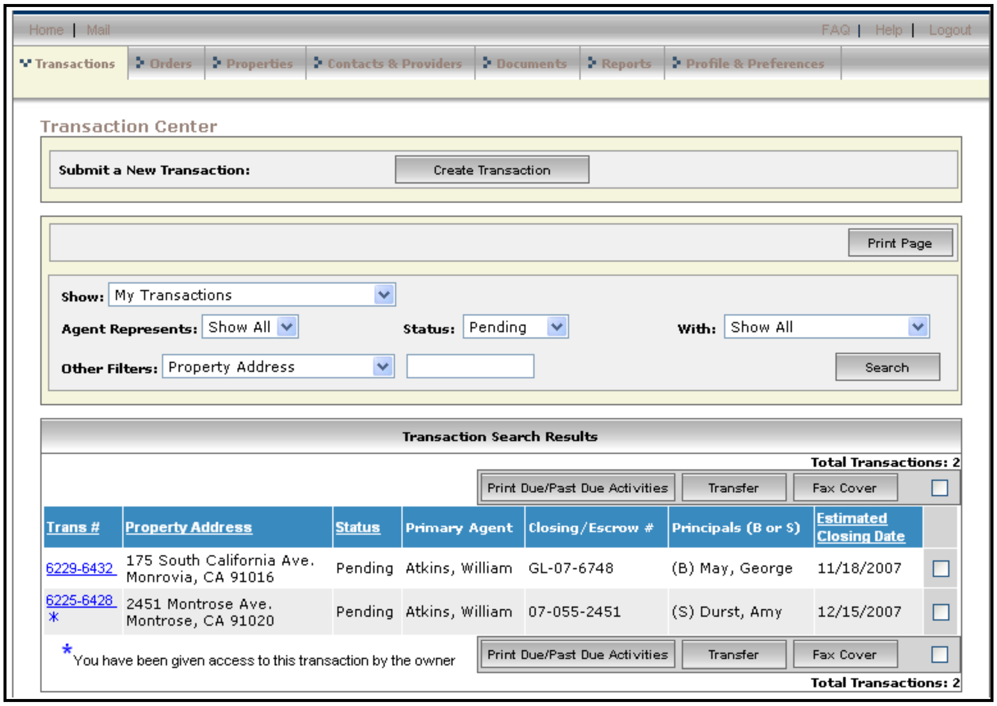


Transaction Center

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.

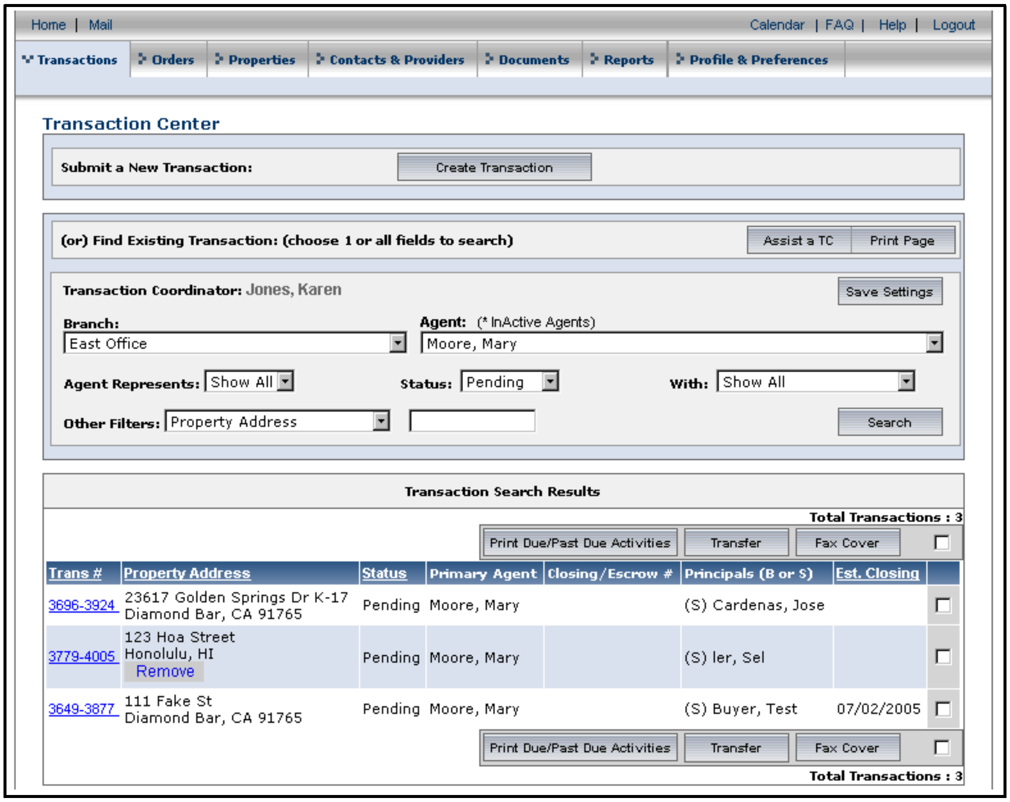
2. Click **Transaction Center**. The **Transaction Center** page appears. You may also click **HOME** for the same results.



Searching Transactions

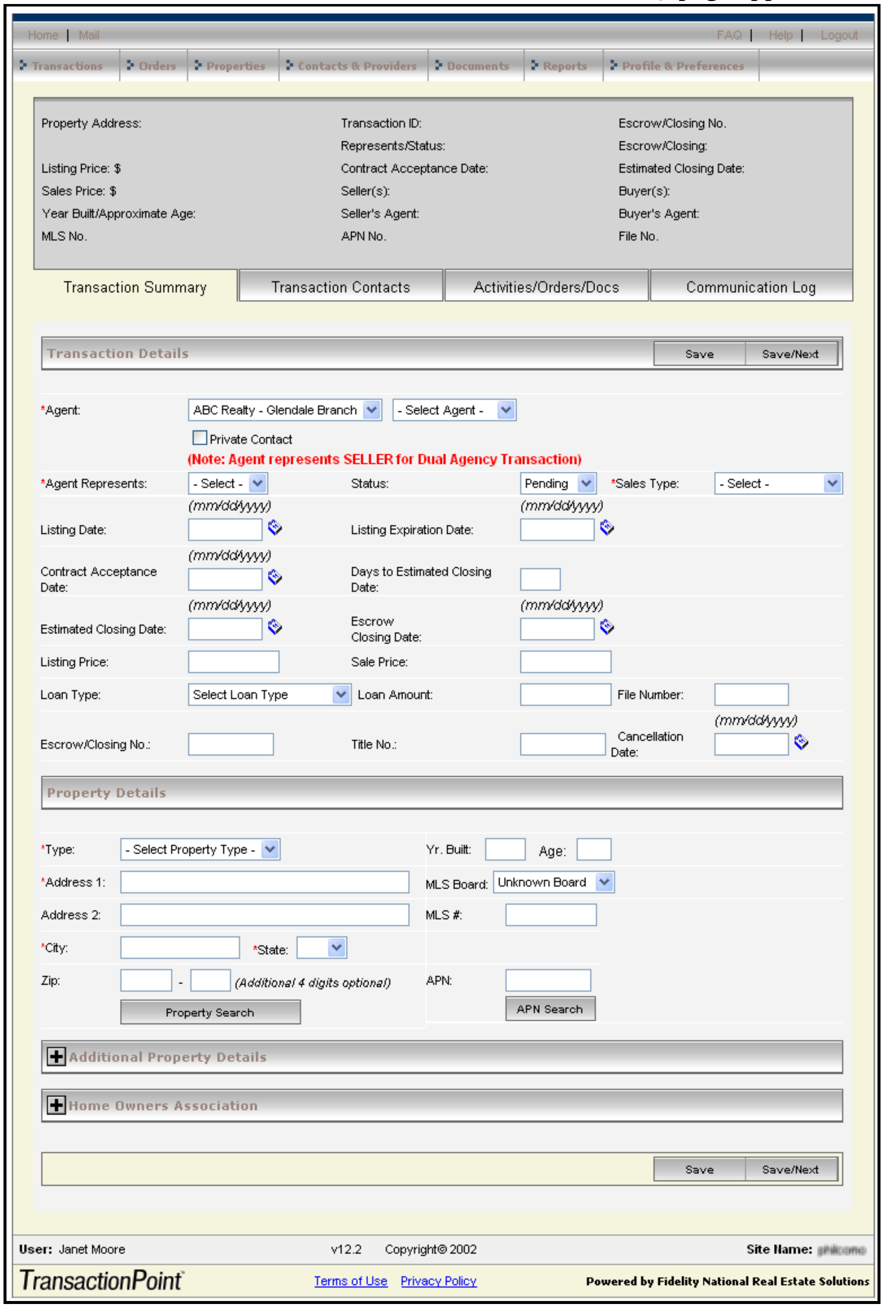
1. Select the search criteria for the transaction.

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



Creating a New Transaction

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

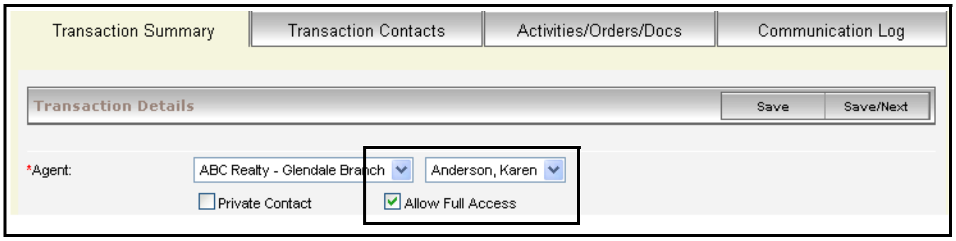


2. Set access options for Transaction Coordinators and Full Access Agent. (Not available to all users)

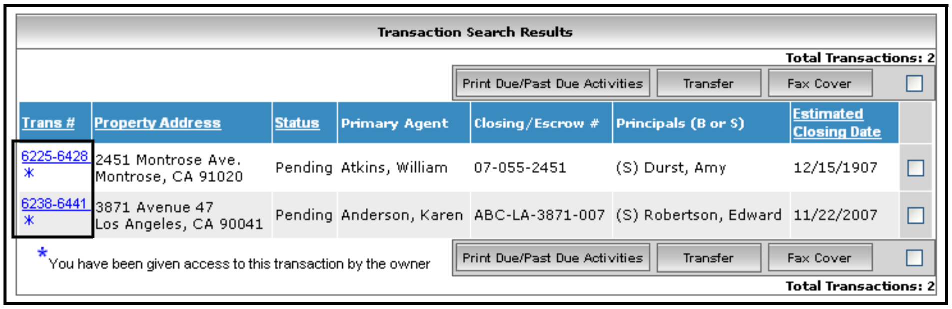
   - Transaction Coordinators can give Full Access Agents full access to a transaction.

     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.



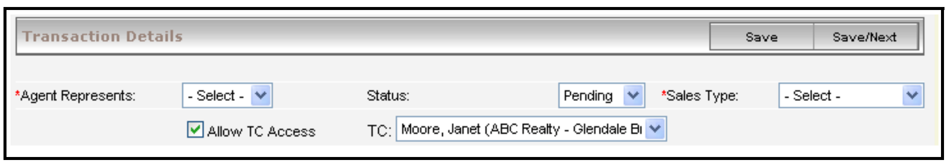
The transaction will appear in the Full Access Agent's list with an asterisk, indicating full access.



- Full Access Agents can assign Transaction Coordinators to a transaction.

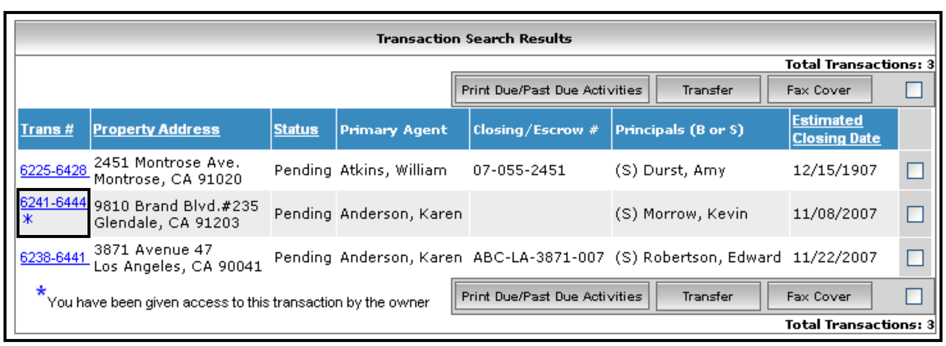
i. Select the **Allow TC Access** check box.

ii. In the **TC** list, select the Transaction Coordinator to receive full access to the transaction.



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.



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.

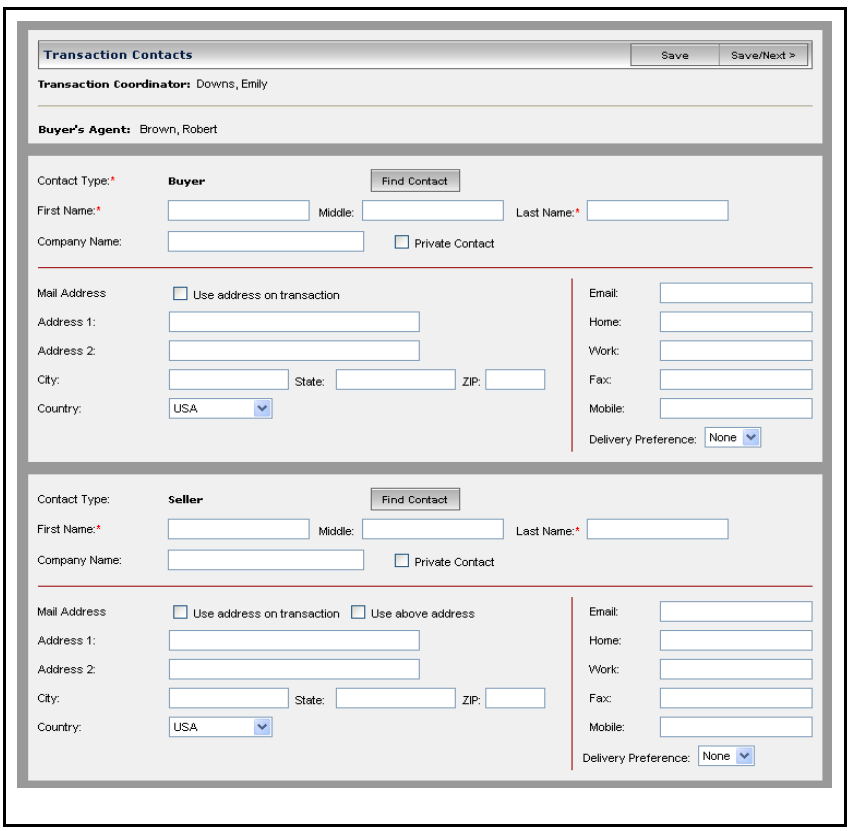
Note: Additional Property Detail and Home Owners Association information is not required to proceed with this transaction.

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.

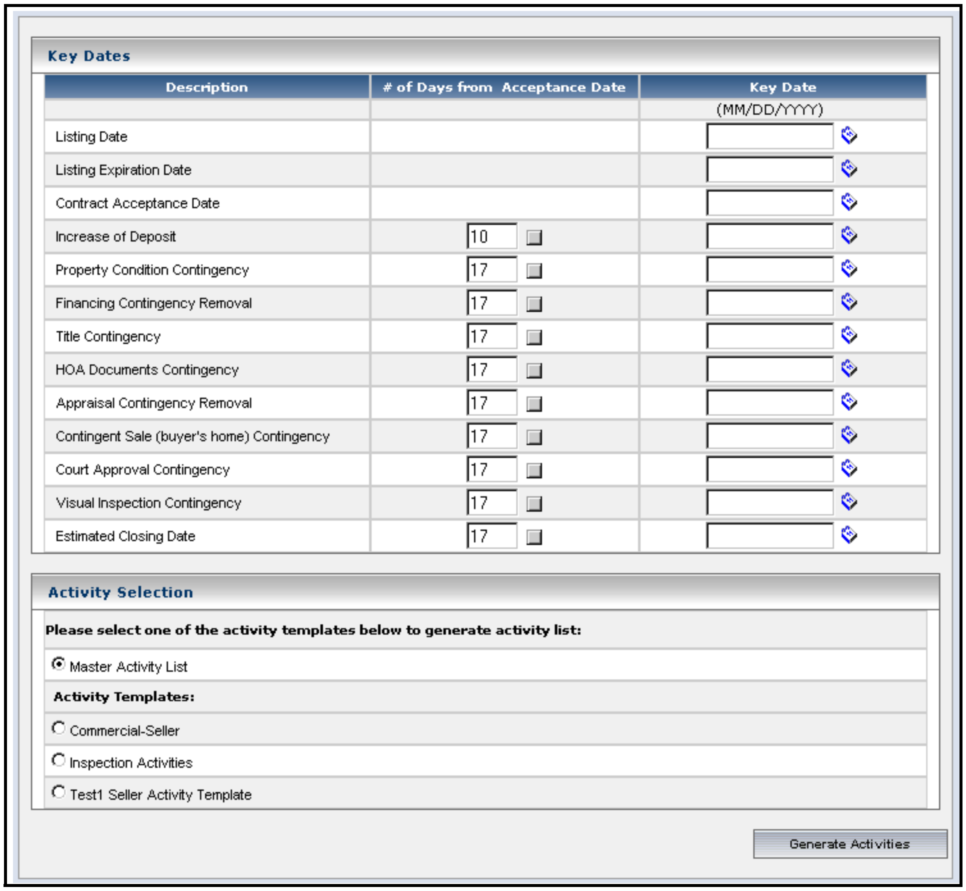


2. Complete the requested information. Only the names are required. Click **Find Contact** to search existing contacts if the seller has been involved in a prior transaction.

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.



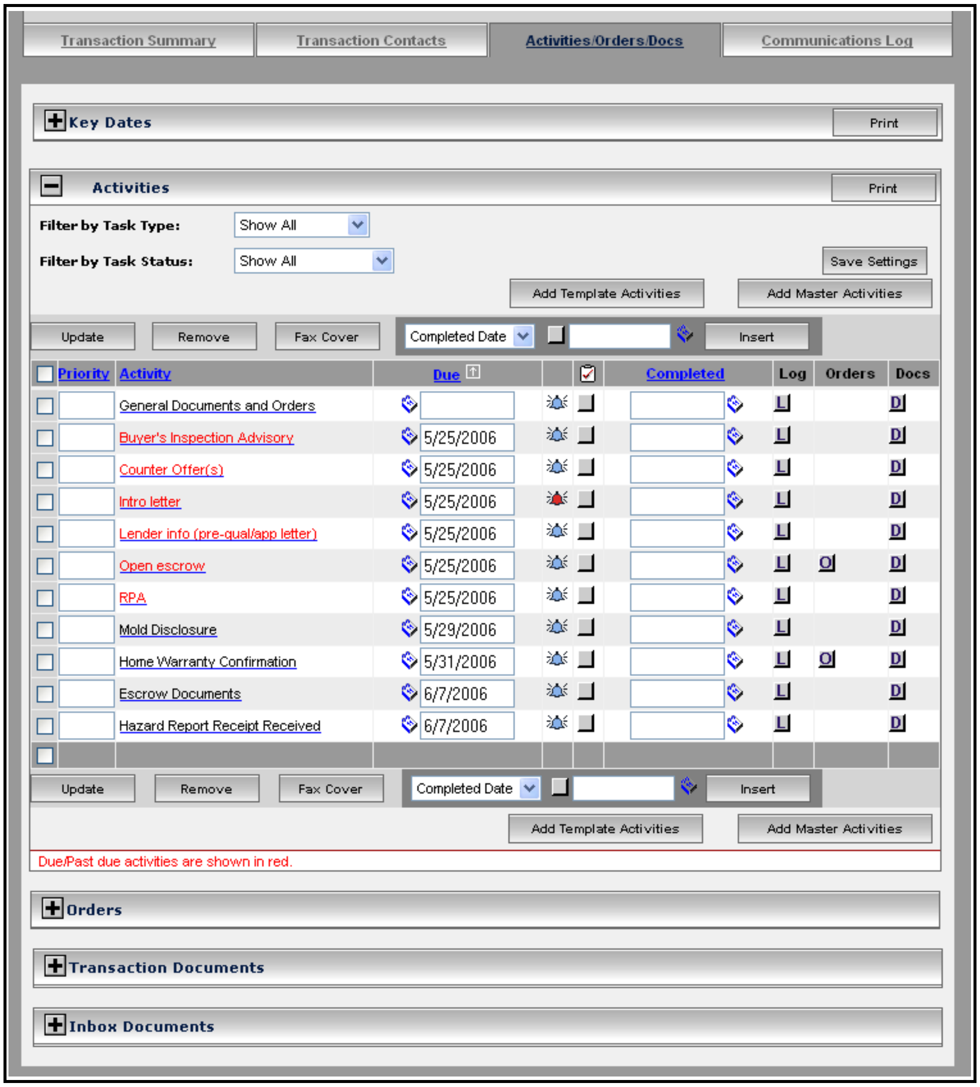
Note: The System Administrator can set up default key dates and descriptions. You can modify the default dates, if needed.

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.



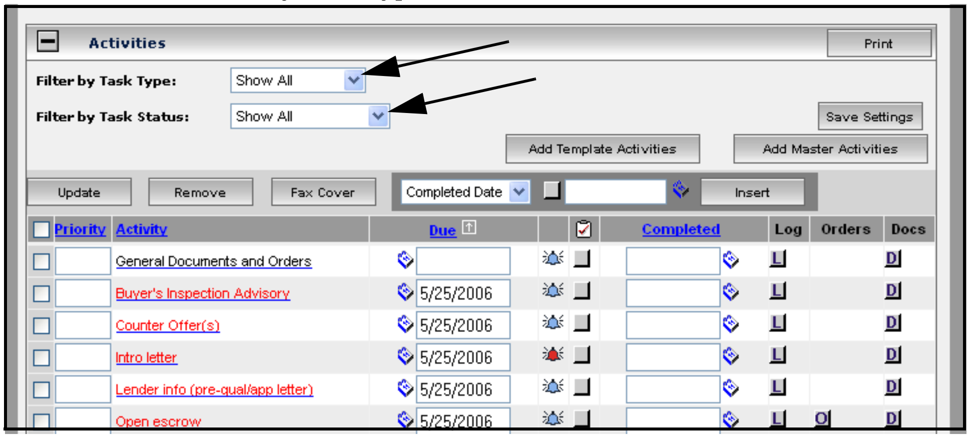
Working with Transaction Activities

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:



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**.

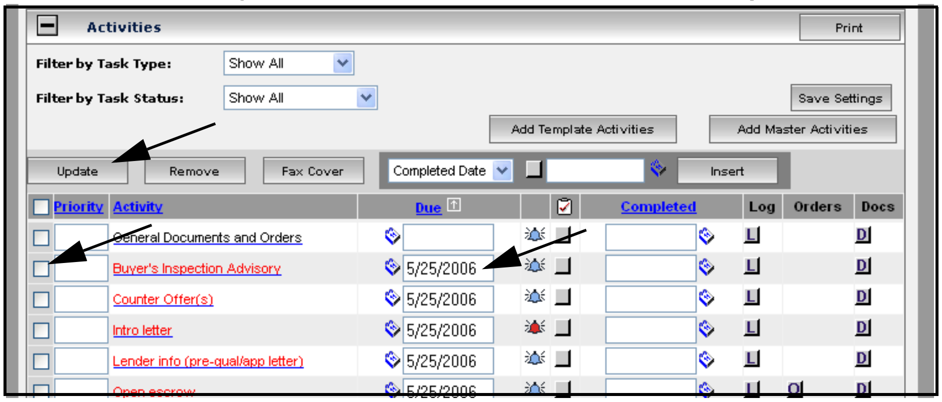
Removing Activities

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

Updating Due Dates

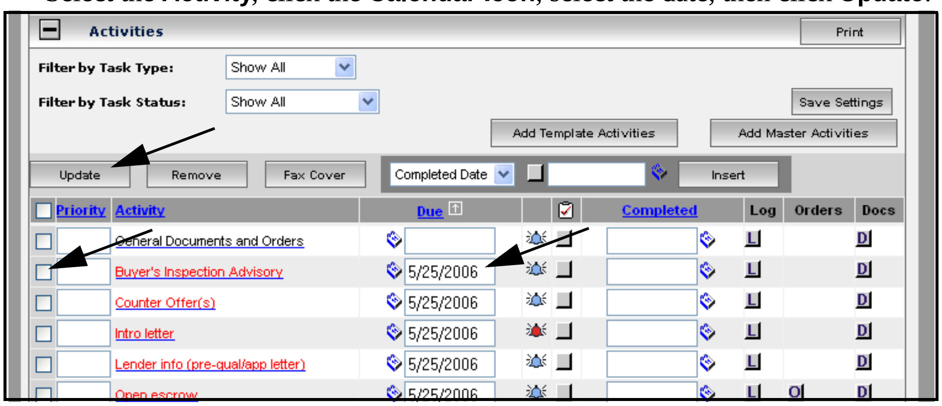
You can update due dates for your activities several ways ways:

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



  You can select multiple activities to update at once.

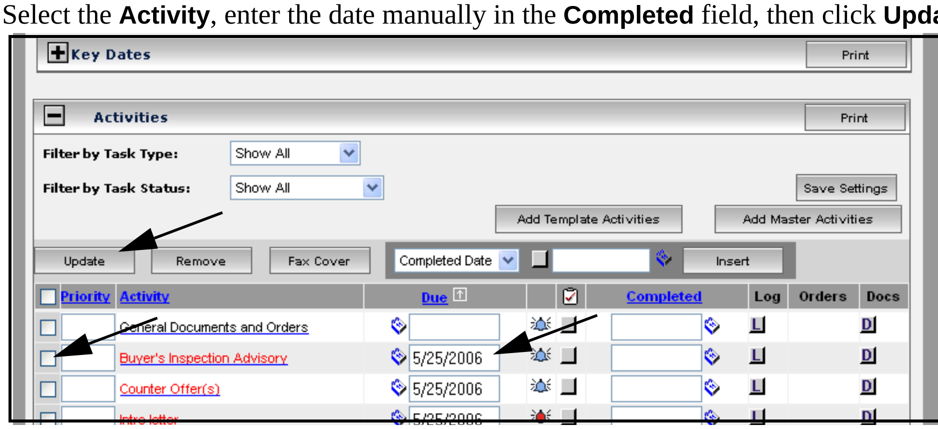
- Select the **Activity**, click the **Calendar Icon**, select the date, then click **Update**:



- 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**:

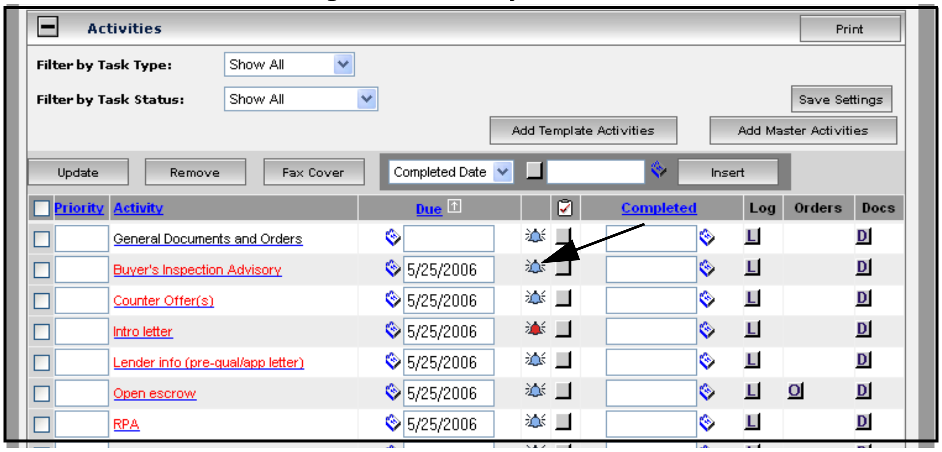


You can select multiple activities to update at once. You can also click the grey box next to the **Completed** field to automatically insert today's date.

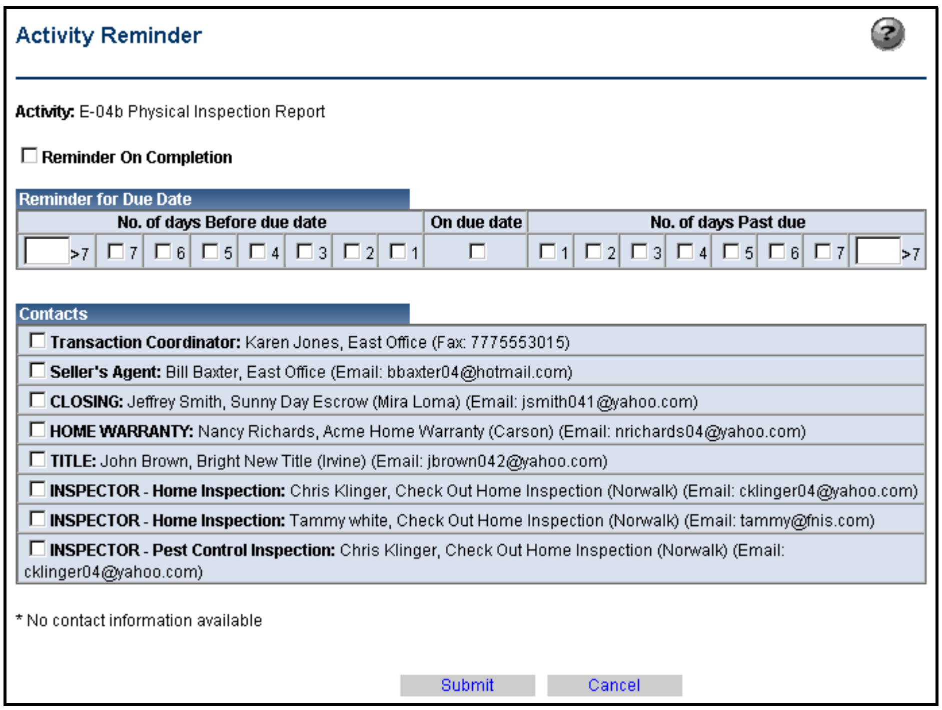
Setting Alerts

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 **Activity Reminder** page appears.



2. Select the reminders you want to send. If you select multiple boxes, multiple alerts are sent.

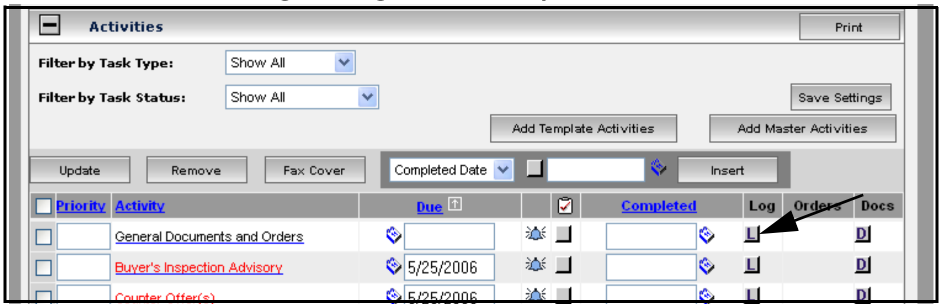
3. Select the **Contacts** you want to receive the reminders.

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.

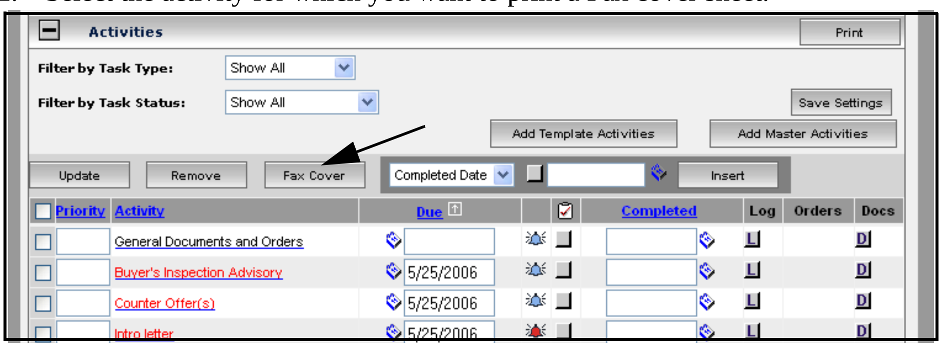


2. Enter your comment.

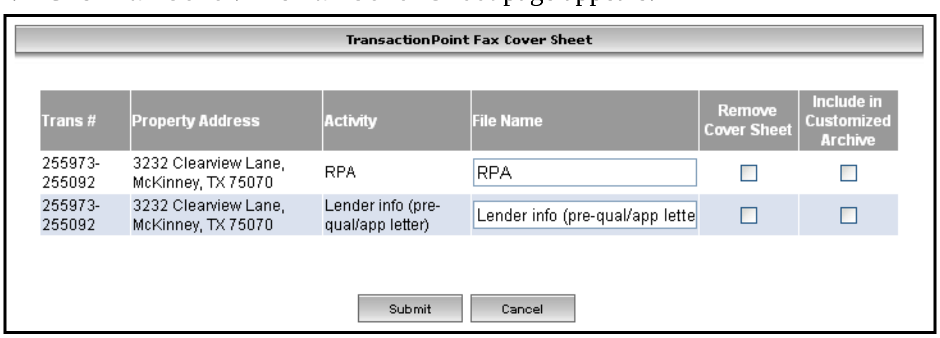
3. Click **Submit**.

Printing Fax Cover Sheets

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



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

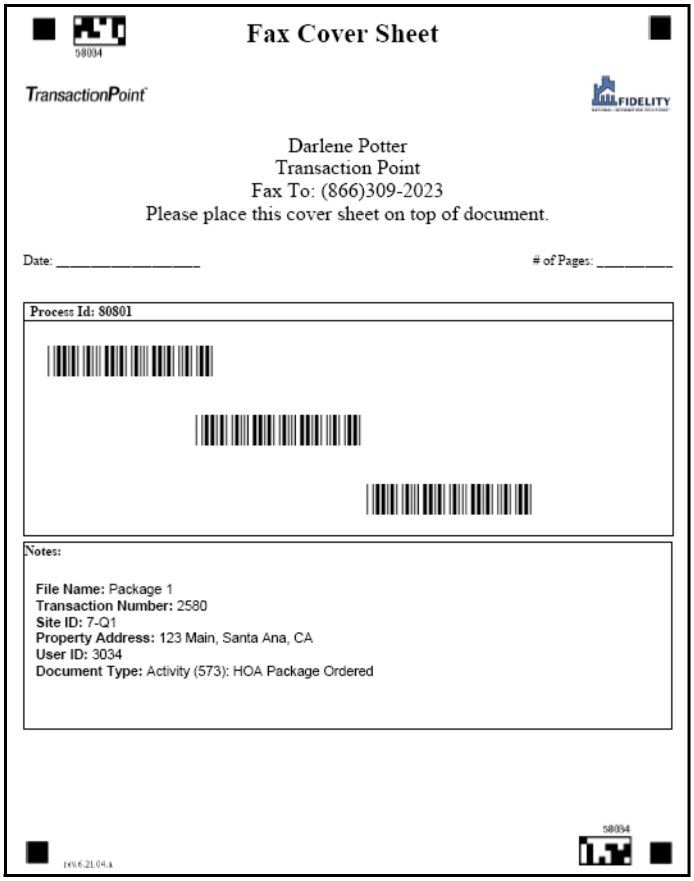


When you create a fax cover sheet from the Transaction Center, within your user profile in the Transaction Center, and in the Order section of your transaction, you can choose to have the system delete the fax cover sheet when the fax is posted to TransactionPoint.

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.

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


58034

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

58034

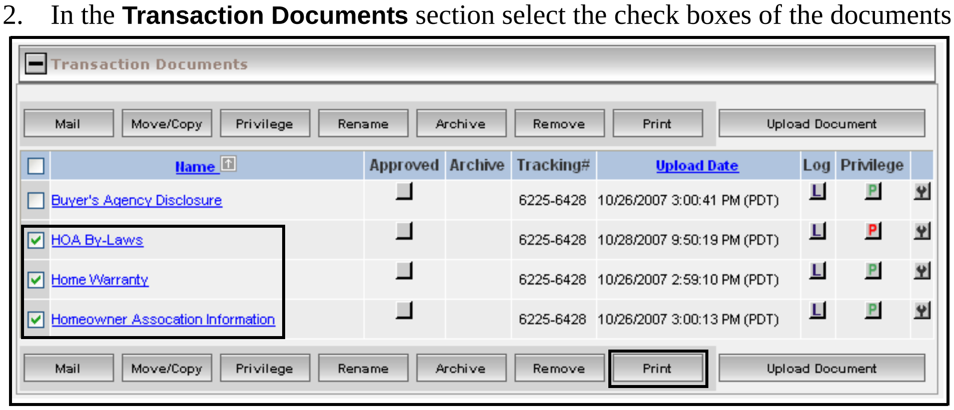
Note: The Dispatcher (service provider) can create a fax cover sheet from the Order Center. See *Editing an Order* on page 55.

Printing Multiple Documents

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

1. Open the transaction and click the **Activities/Orders/Docs** tab.

2. In the **Transaction Documents** section select the check boxes of the documents you want to print and click **Print**.

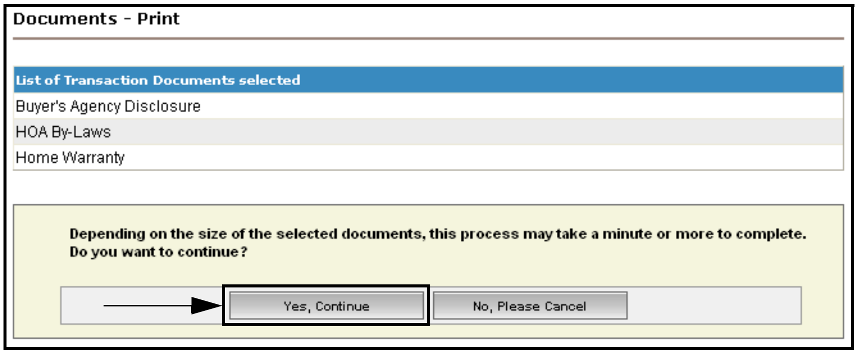

Transaction Documents

Mail | Move/Copy | Privilege | Rename | Archive | Remove | Print | Upload Document

	Name	Approved	Archive	Tracking#	Upload Date	Log	Privilege	
☐	Buyer's Agency Disclosure			6225-6428	10/26/2007 3:00:41 PM (PDT)			
☑	HOA By-Laws			6225-6428	10/28/2007 9:50:19 PM (PDT)			
☑	Home Warranty			6225-6428	10/26/2007 2:59:10 PM (PDT)			
☑	Homeowner Assocation Information			6225-6428	10/26/2007 3:00:13 PM (PDT)			

Mail | Move/Copy | Privilege | Rename | Archive | Remove | Print | Upload Document

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



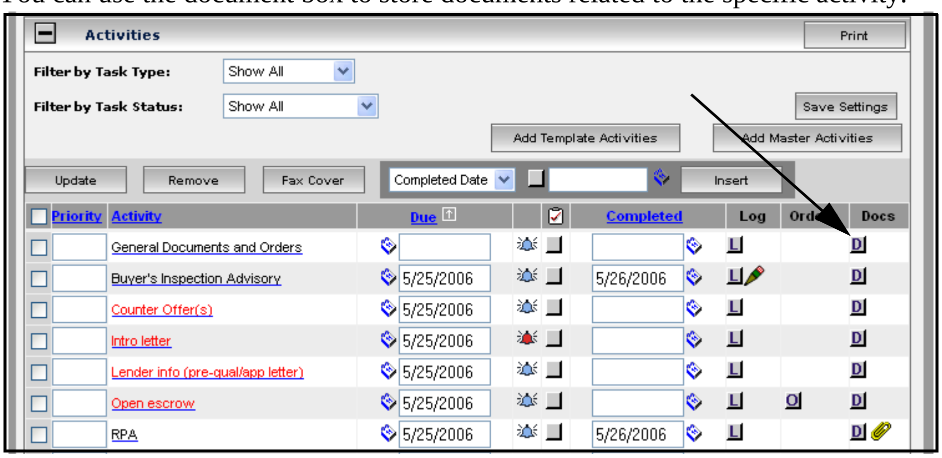
Note: This step gives you the option to either continue assembling and printing the documents or cancelling the process. If you continue, during the assembling of the documents you again have the option of cancelling the operation.

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

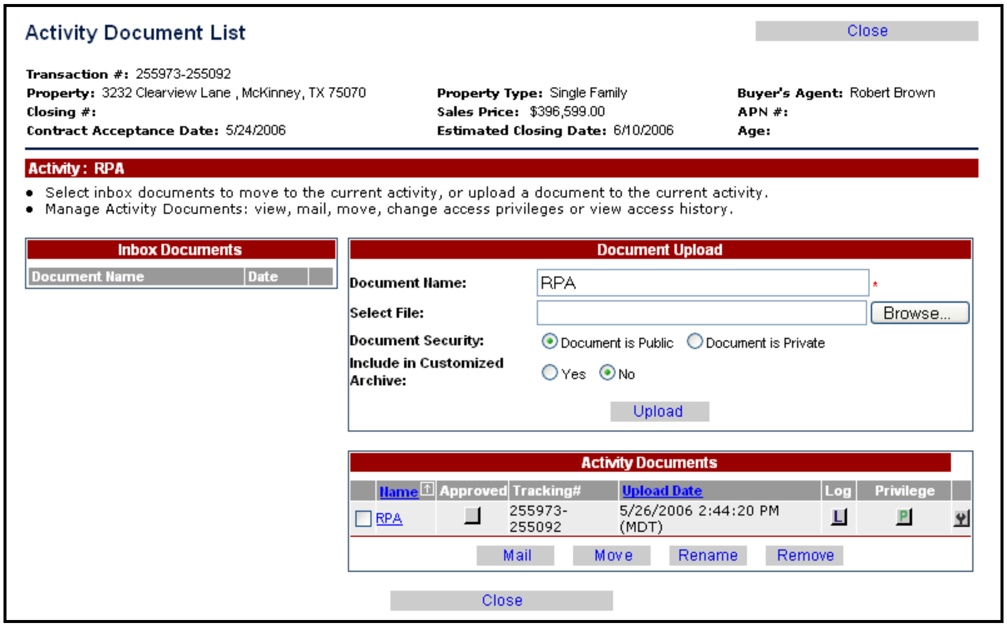
The letter **D** appears under the document's heading on the activity line for activities preset to be associated with documents. You can use the document box to store documents related to the specific activity.



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.



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**.

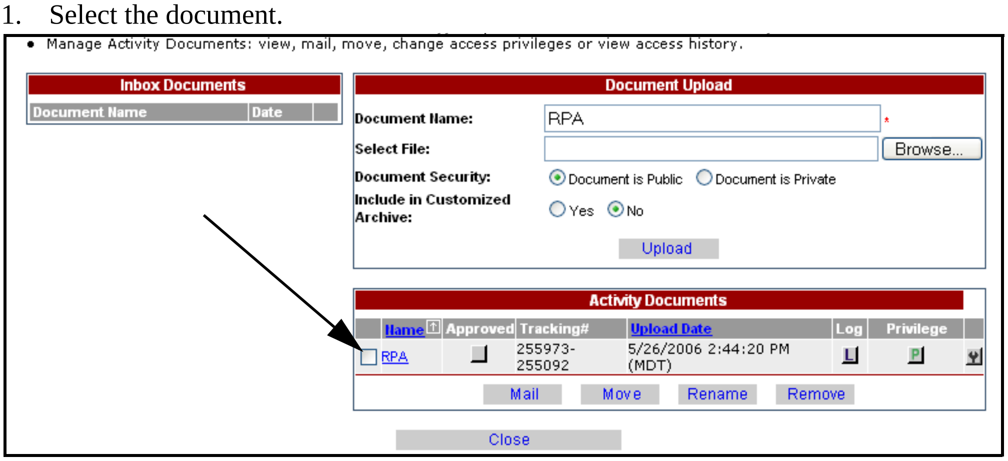
6. Select **Yes** if you want to include this document in a customized archive.

7. Click **Upload**.

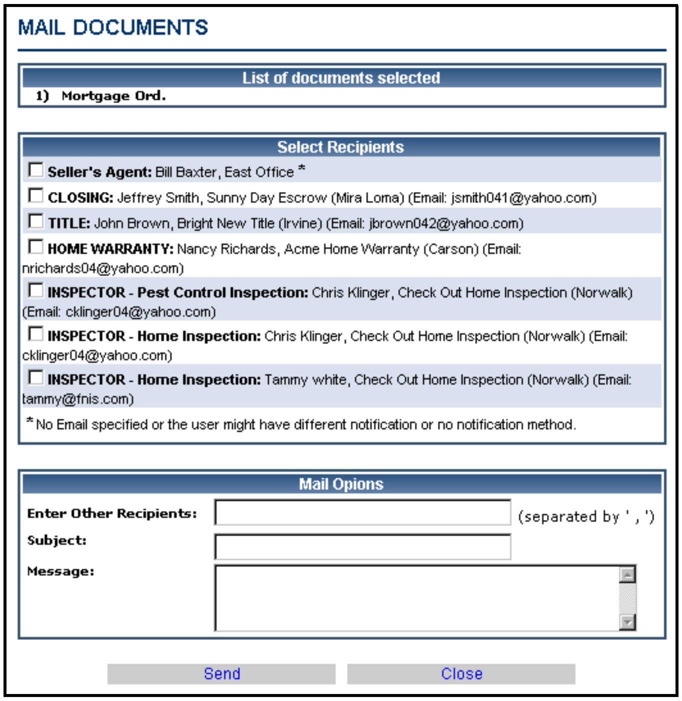
To view a document, click on the document name. To assign specific privileges to this document, click the letter **P** on the right of the document line.

Emailing an Activity Document

1. Select the document.



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



3. Select the **Recipients**.

4. Enter any **Other Recipients**, separated by a comma.

5. Enter a **Subject**.

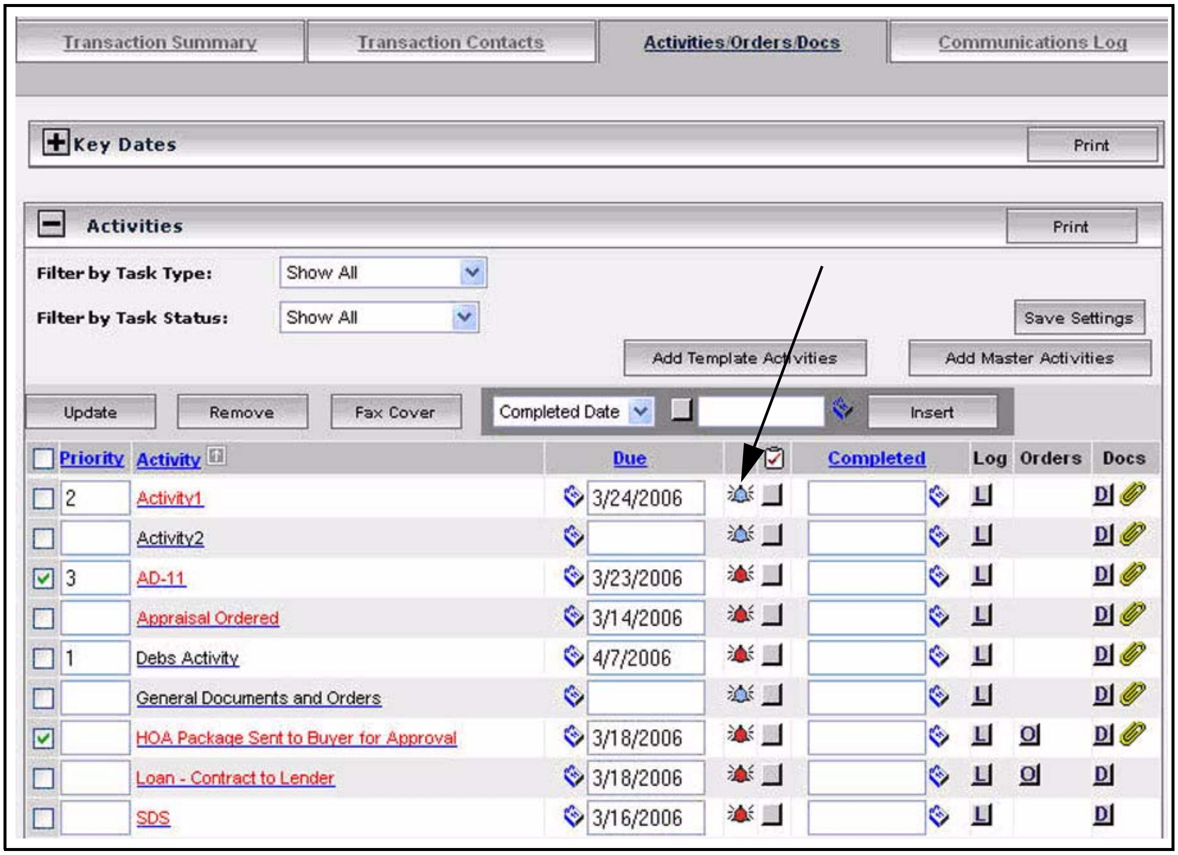
6. Enter a **Message**.

7. Click **Send**.

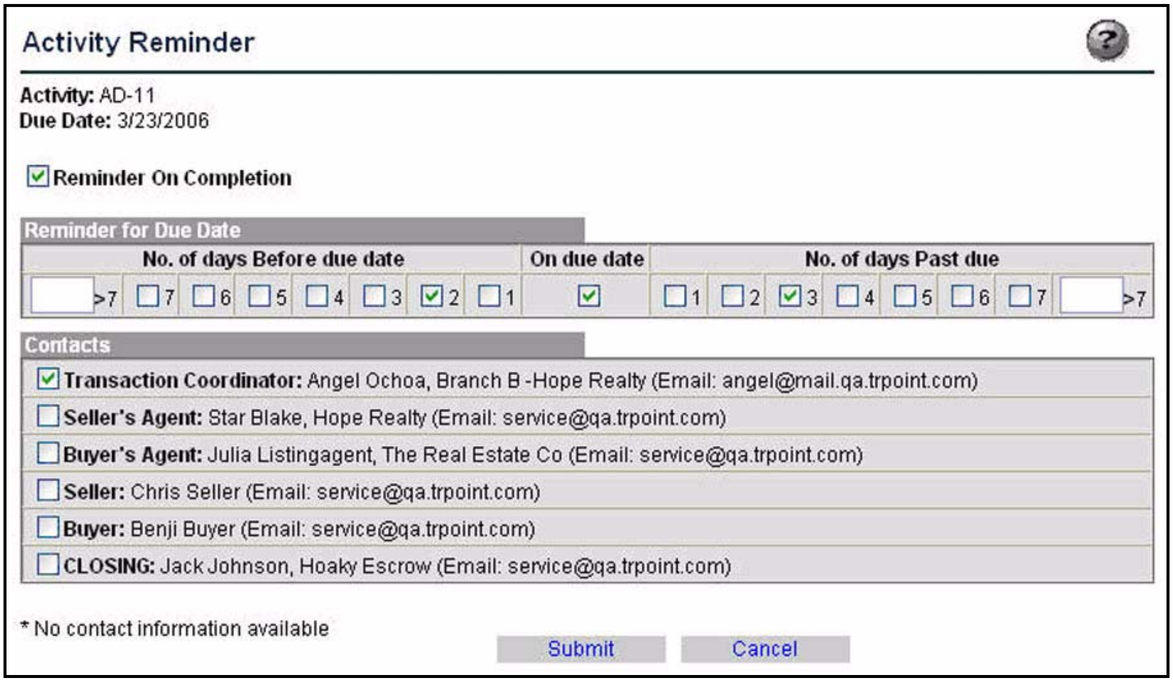
Using Default Activity Reminders

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.



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.



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

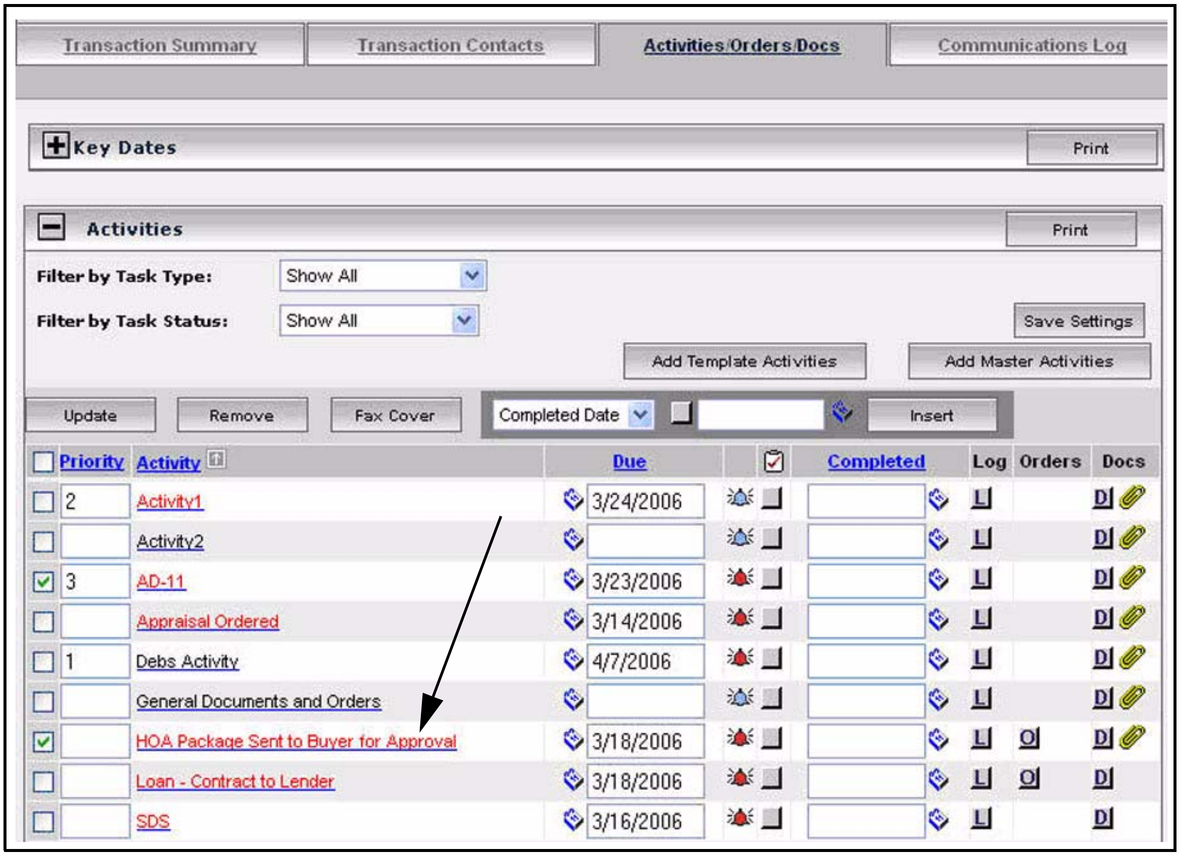
Viewing Default Activities Priveleges and Archive Settings

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

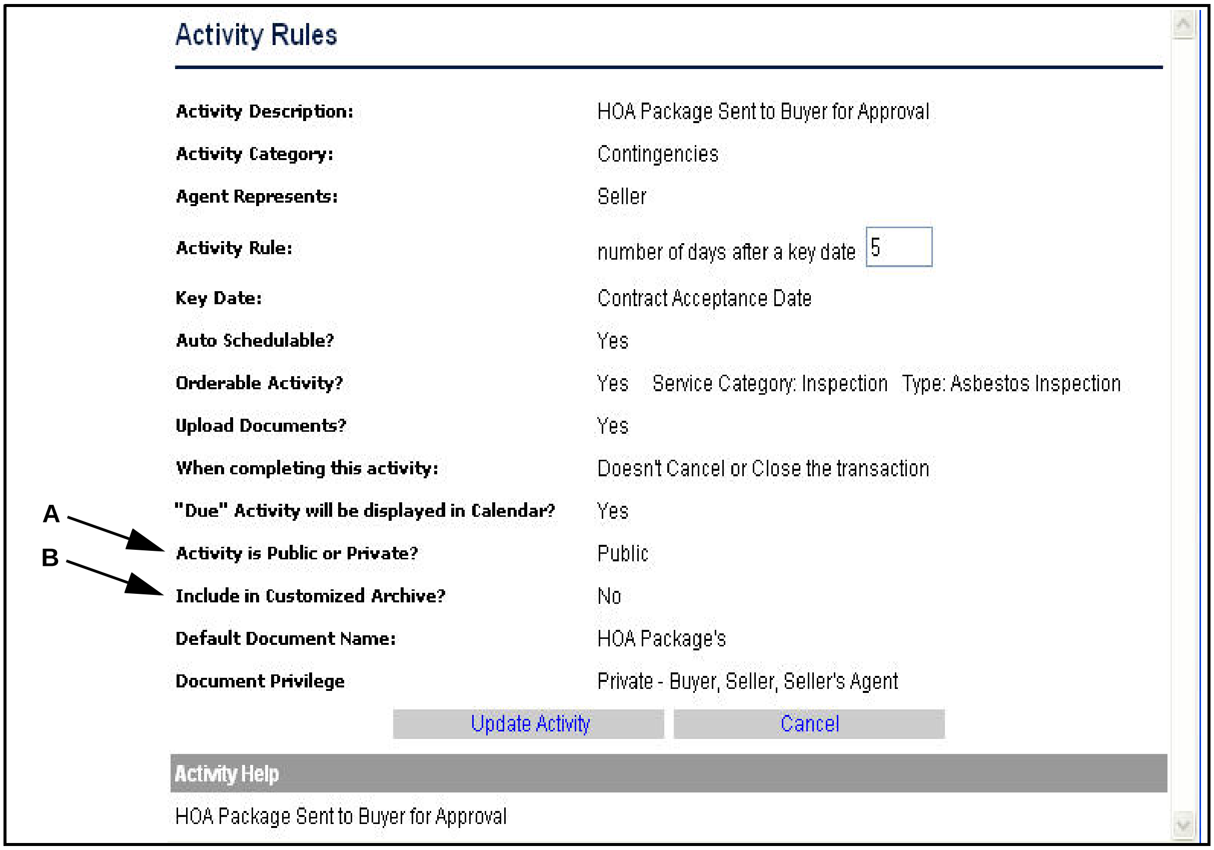
- Public makes the activity viewable to all parties named in the transaction.
- Private makes the activity viewable only to the Primary Agent, Transaction Coordinator, and Super User.

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.



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



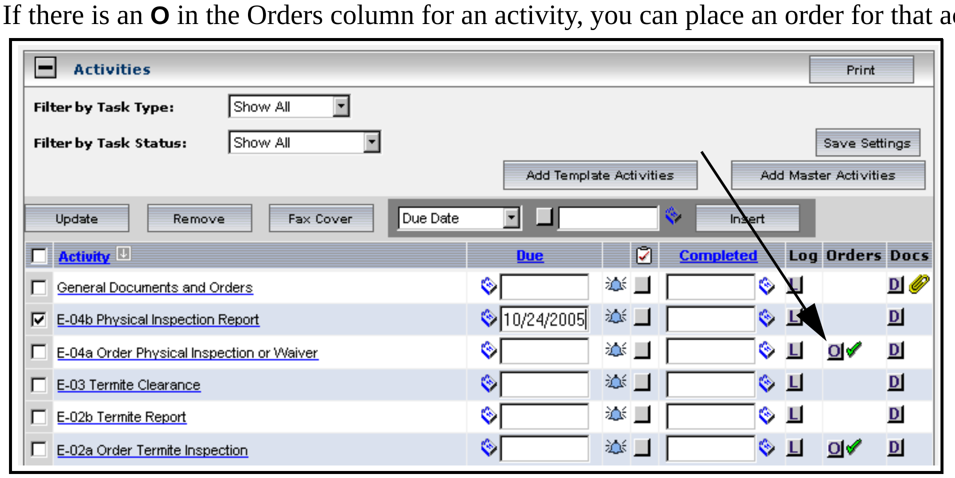
The Site Administrator can also set each activity to be included in the Customized Archive CD burn. If an activity is set to **No**, it is not included in the Customized Archive CD that you or an agent creates (see arrow **B** above).

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

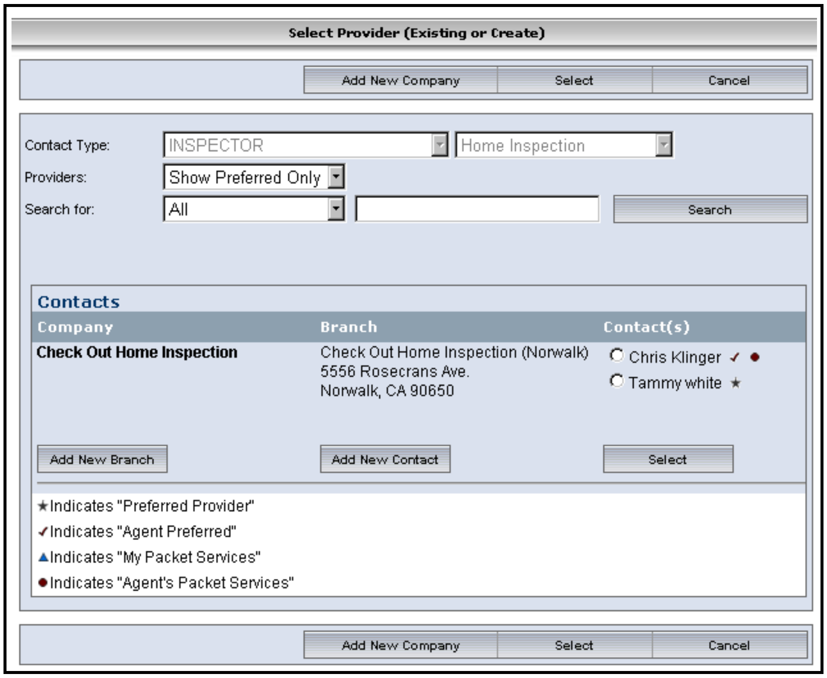
To set activities using the **Customized Archive** feature, see *Customizing Archive Options* on page 47.

Placing Activity Orders

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

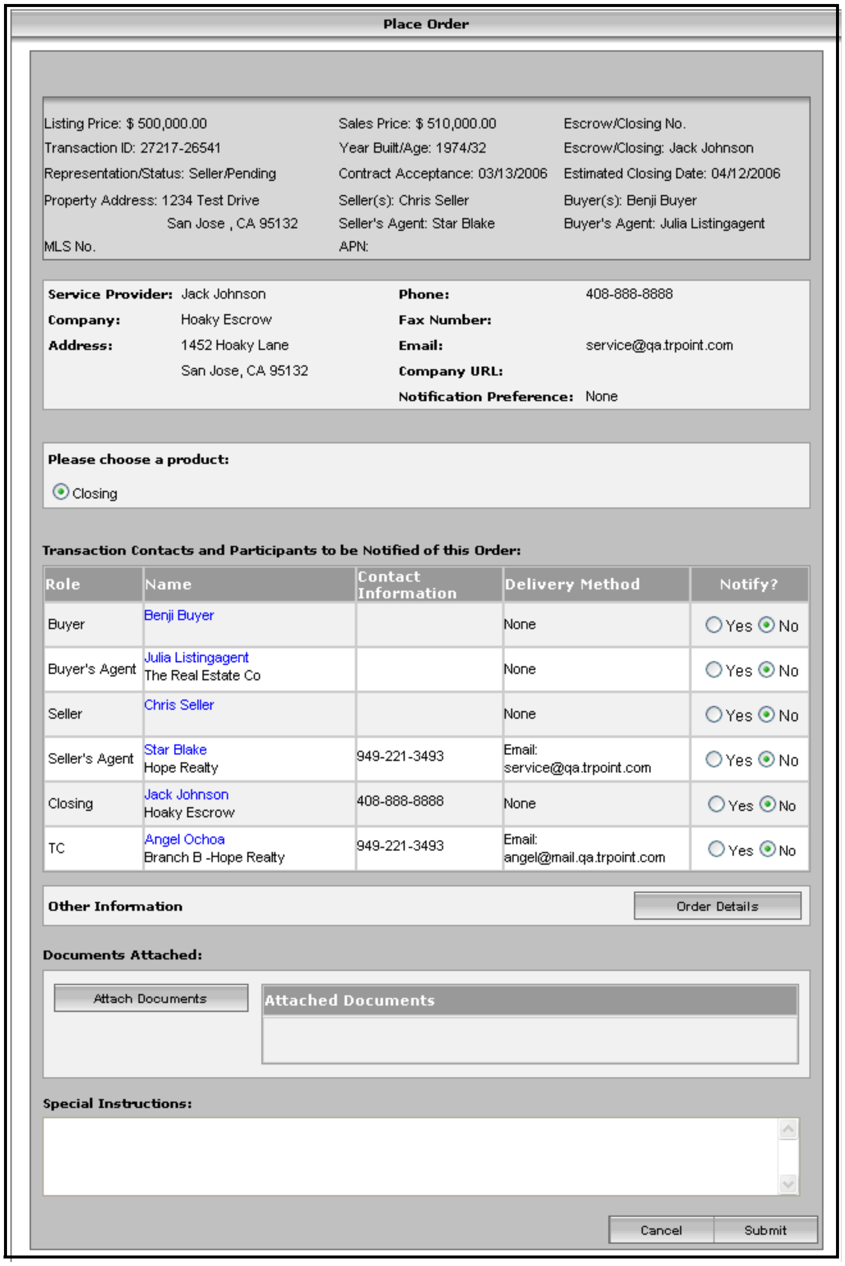


1. Click **O**. The Select Provider page appears.



2. Select the **Provider Contact**.

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



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**.

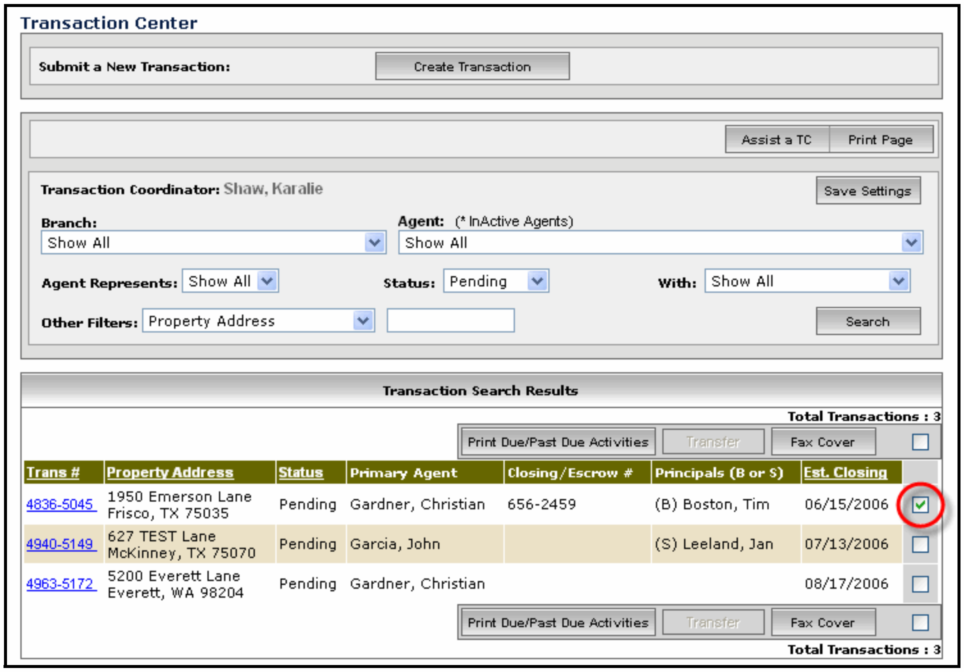
Printing Due/Past Due Activities

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.



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

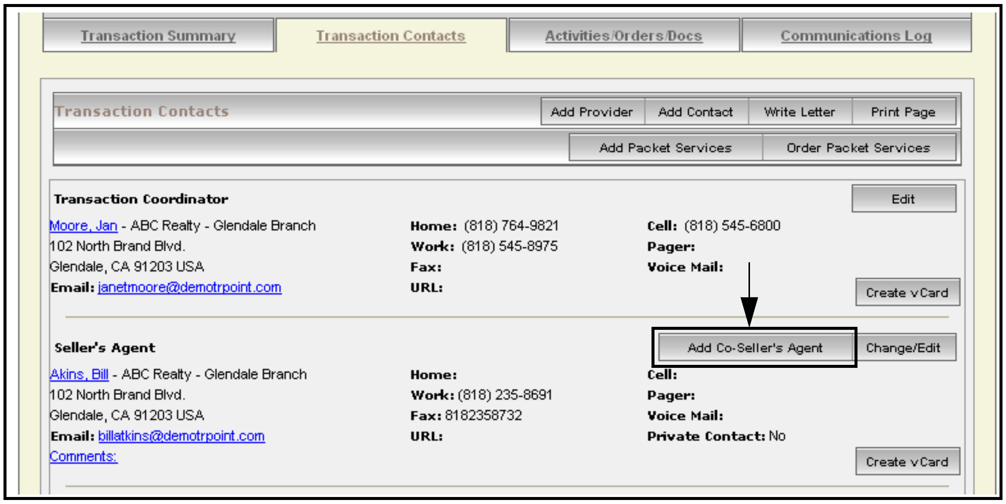
Adding a Co-Agent

1. Select the appropriate transaction.

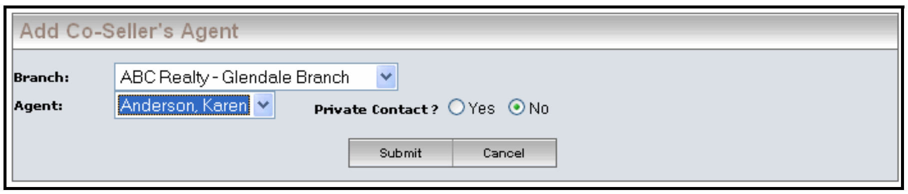
2. Click Transaction Contacts.

3. Click **Add Co-Seller's Agent** or **Add Co-Buyer's Agent**.

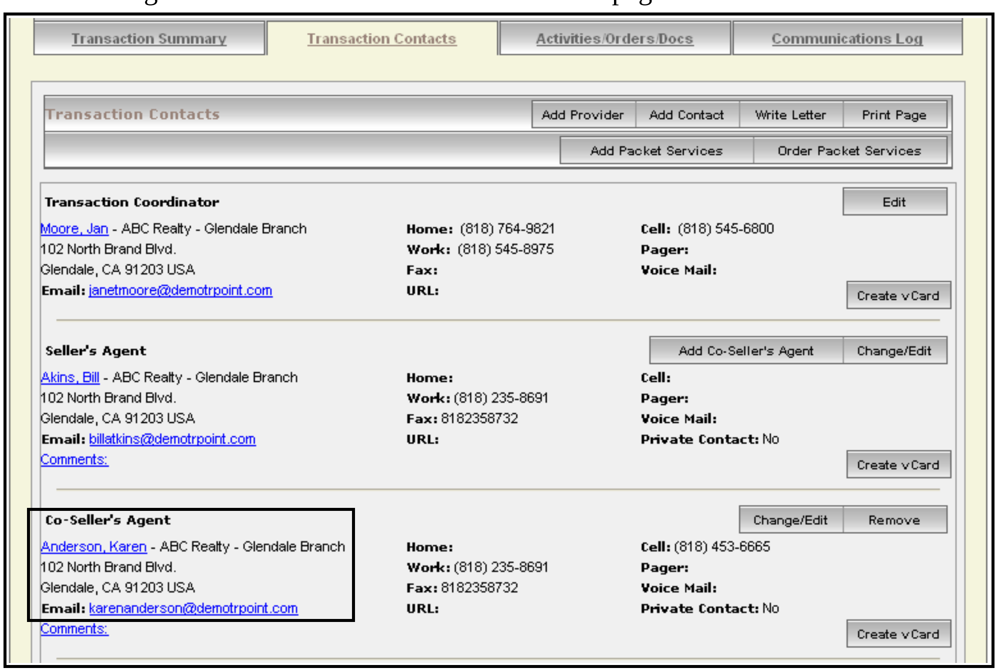
Note: The transaction representation chosen when you created the transaction determines whether the Add Co-Seller's or Add Co-Buyer's Agent button appears.



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



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



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.

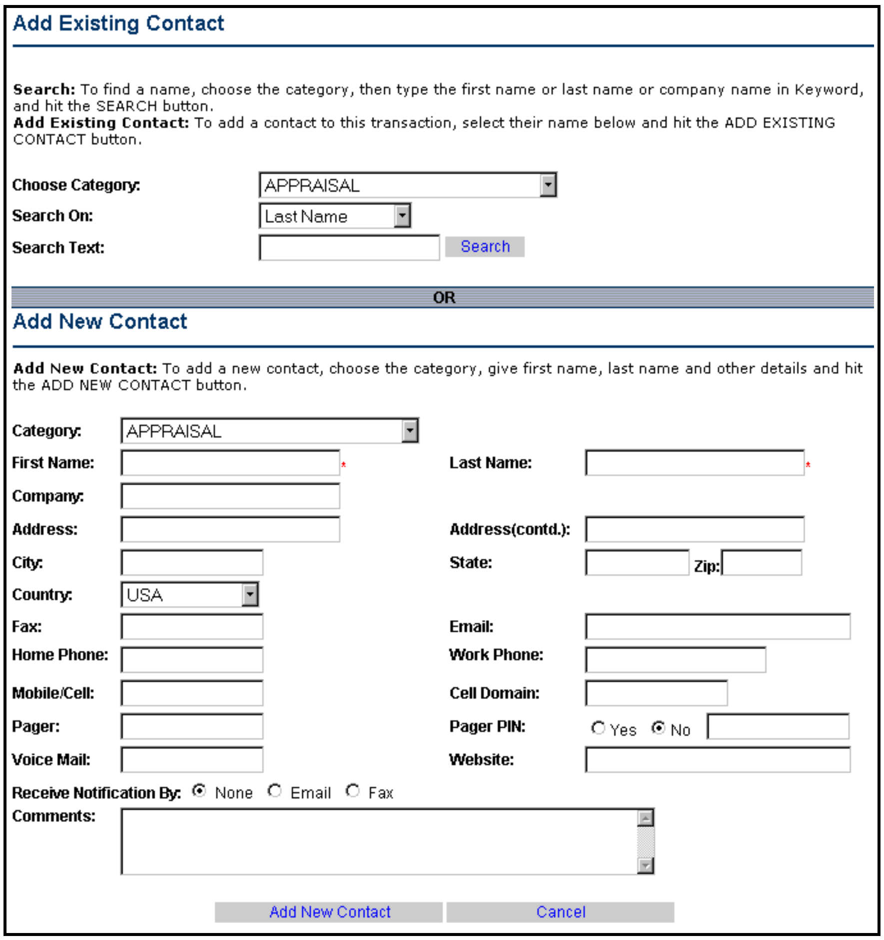
- If the primary agent’s access is View Only and the co-agent’s access is Full, then the co-agent will have view only access.

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.



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.

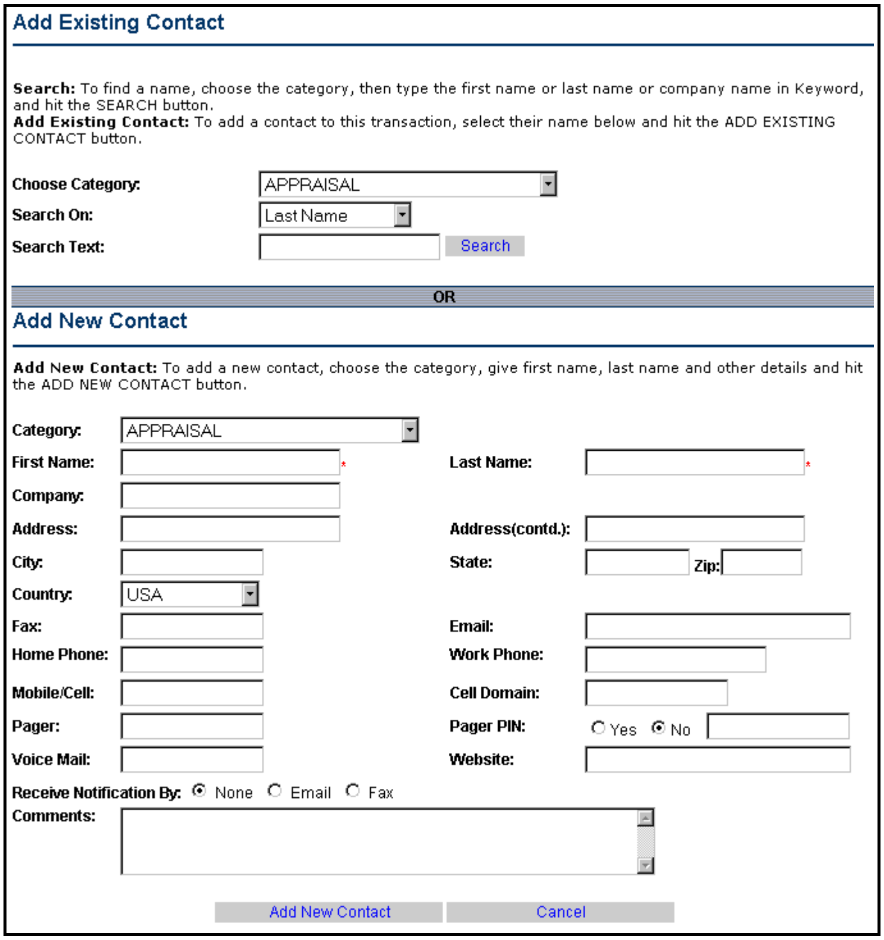
9. Click **Submit**.

Adding a New Contact

1. Select the appropriate transaction.

2. Click **Transaction Contacts**.

3. Click **Add Contact**. The **Add Contact** page appears.



4. Enter the new contact information. **First** and **Last Name** are required fields.

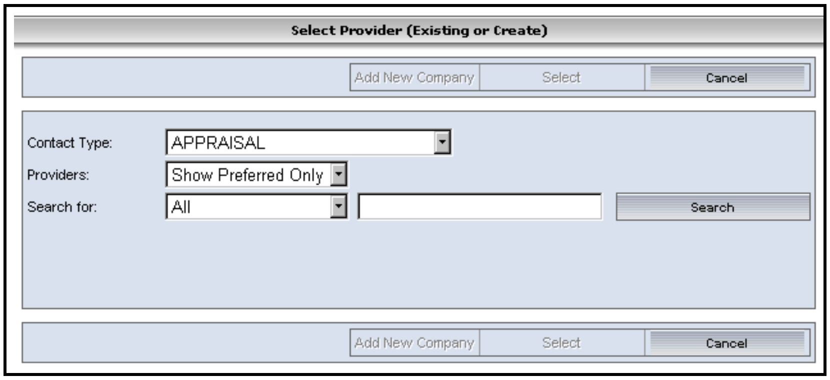
5. Click **Add New Contact**.

Adding an Existing Provider

1. Select the appropriate transaction.

2. Click **Transaction Contacts**.

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



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.

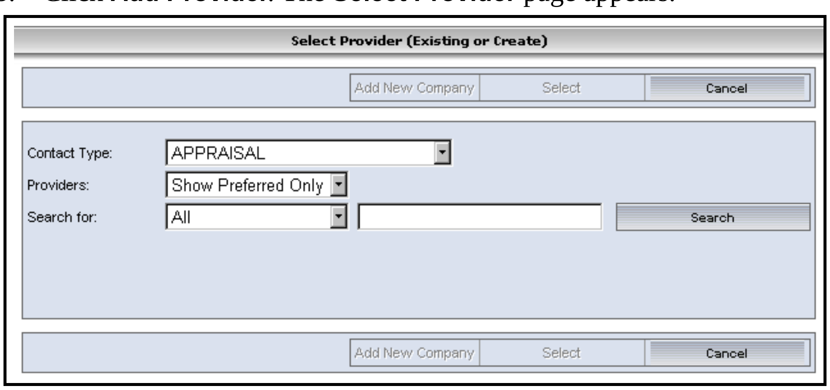
10. Click **Select**.

Adding a New Provider

1. Select the appropriate transaction.

2. Click **Transaction Contacts**.

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



4. Select the **Contact Type**.

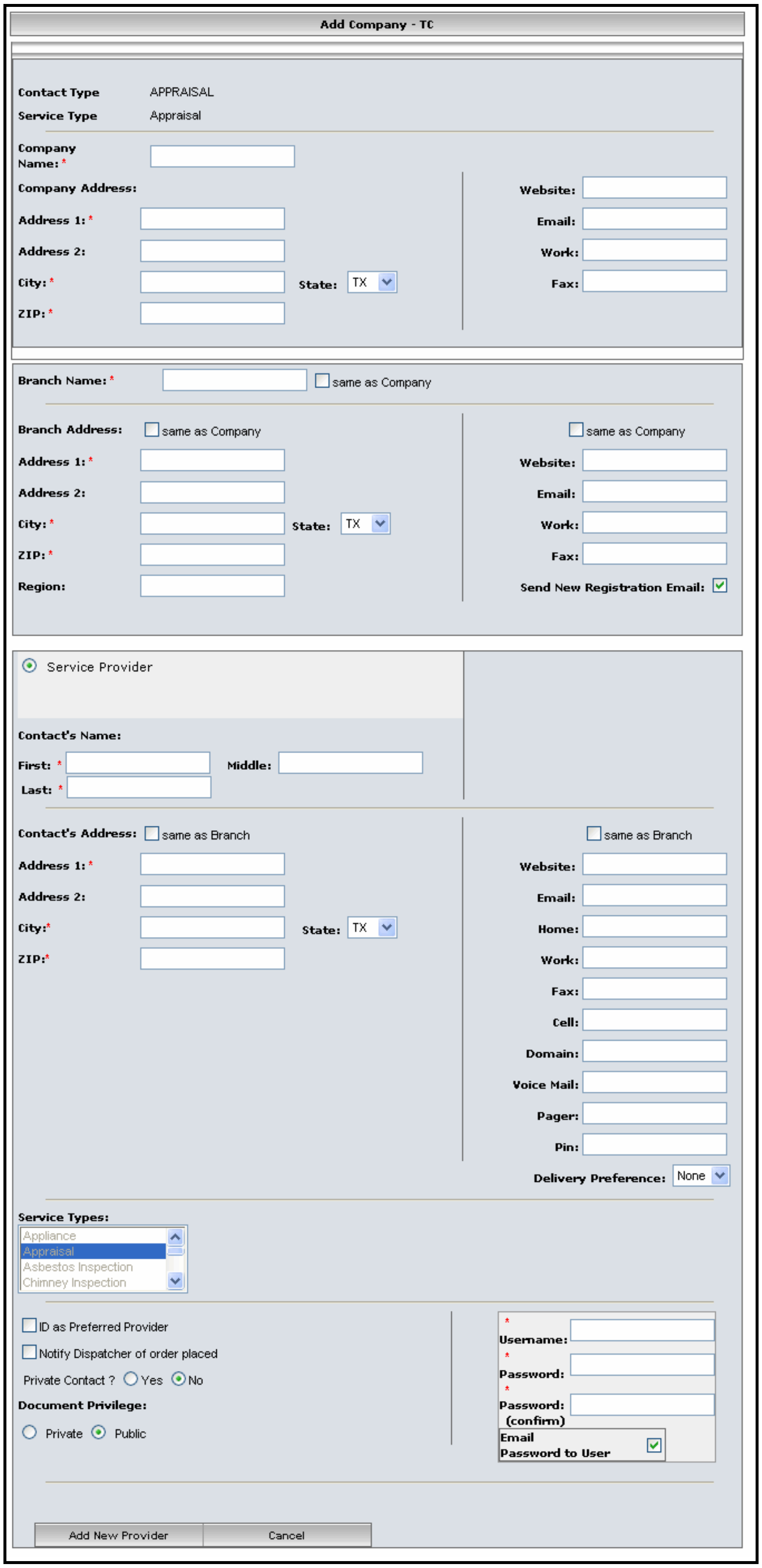
5. Select the **Provider type**.

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.



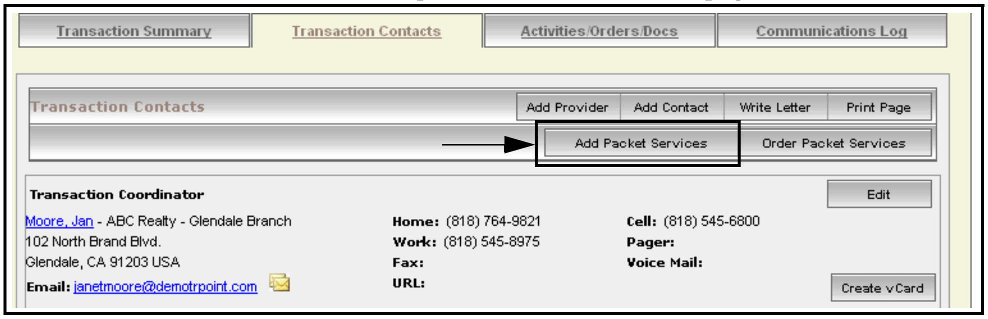
10. Enter the company information. Required fields are marked with asterisks (*).

11. Click **Add New Provider**.

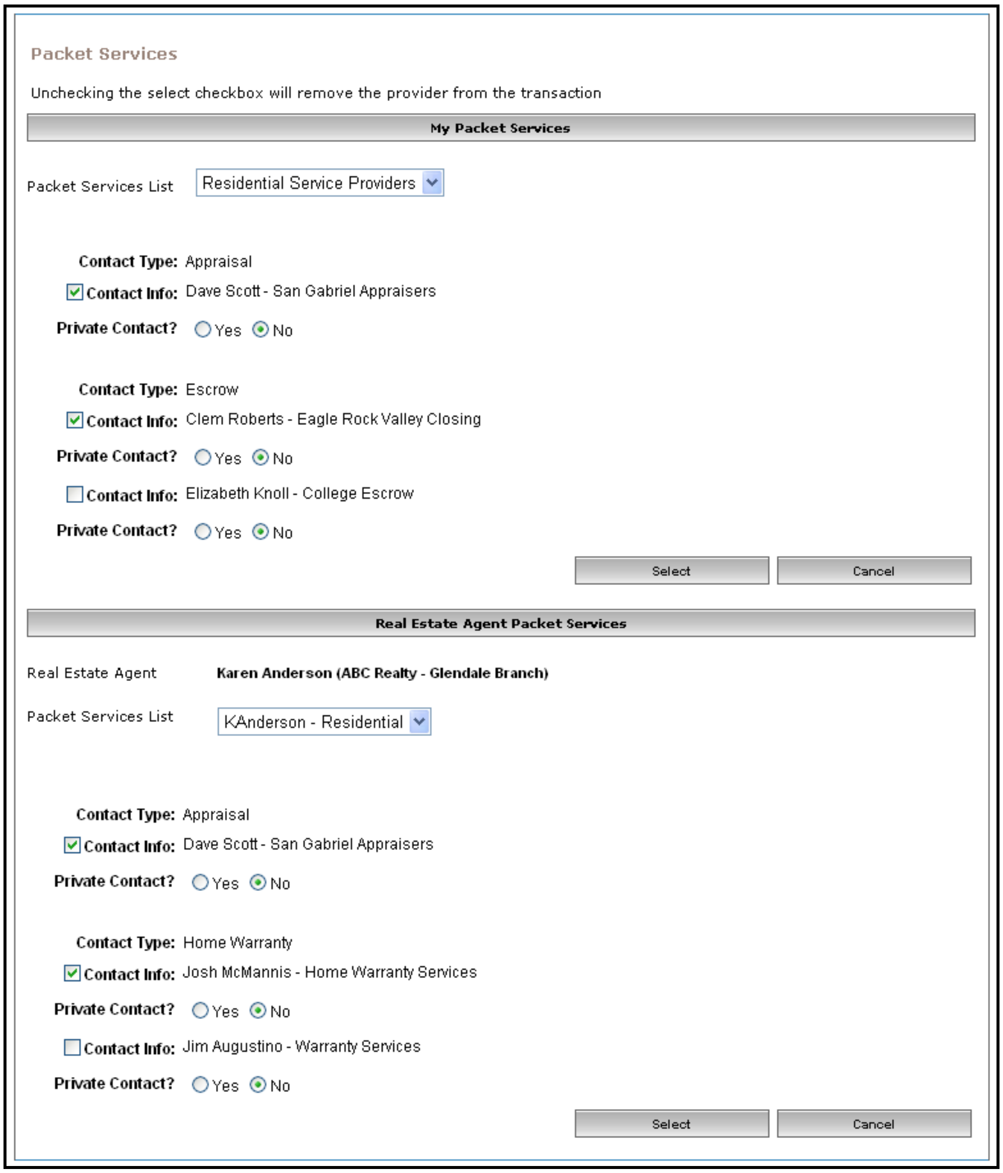
Adding Packet Services

1. Select the appropriate transaction and click **Transaction Contacts**.

2. Click **Add Packet Services** to open the **Packet Services** page.



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



- 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.

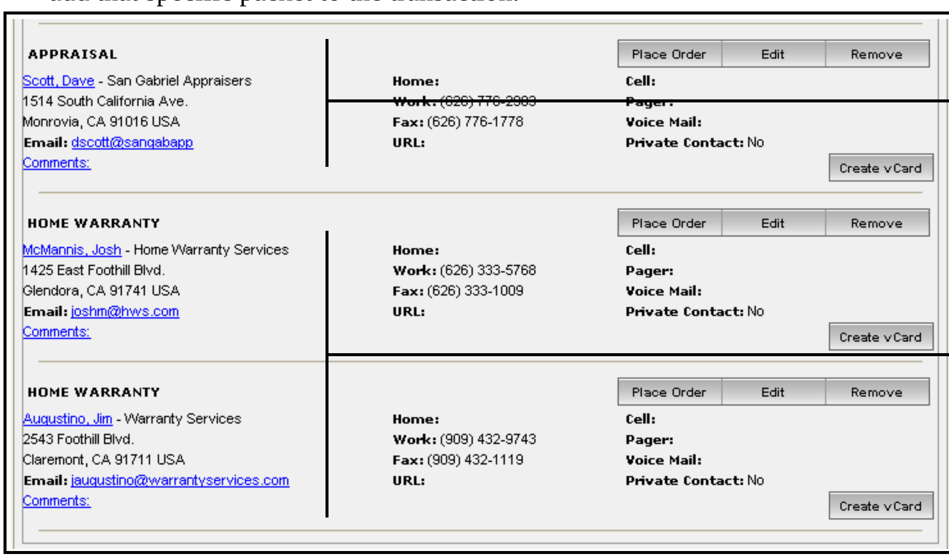
4. Modify the list, if necessary.

   - 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.



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.

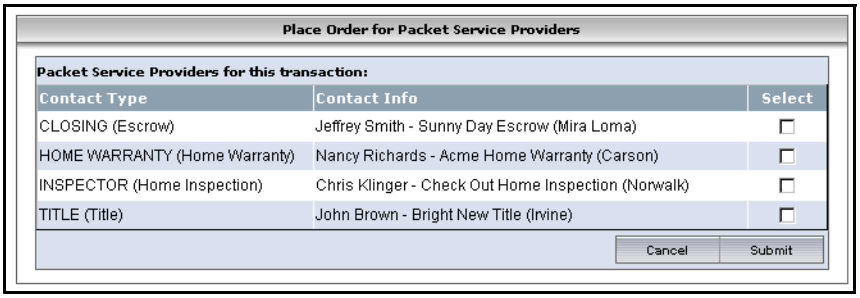
You can now order packet services for the transaction.

Ordering Packet Services

1. Select the appropriate transaction.

2. Click **Transaction Contacts**.

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



Place Order for Packet Service Providers

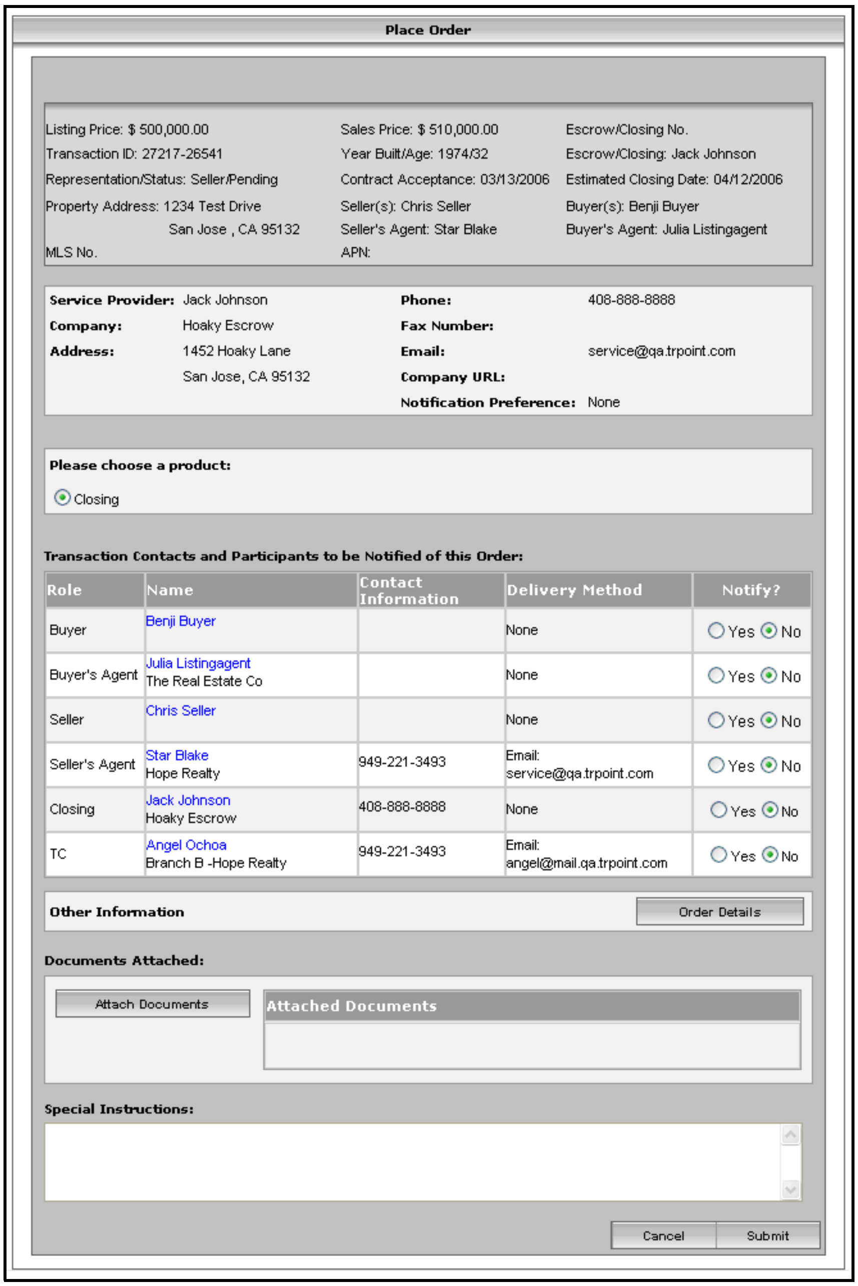
Packet Service Providers for this transaction:

Contact Type	Contact Info	Select
CLOSING (Escrow)	Jeffrey Smith - Sunny Day Escrow (Mira Loma)	☐
HOME WARRANTY (Home Warranty)	Nancy Richards - Acme Home Warranty (Carson)	☐
INSPECTOR (Home Inspection)	Chris Klinger - Check Out Home Inspection (Norwalk)	☐
TITLE (Title)	John Brown - Bright New Title (Irvine)	☐

Cancel | Submit

4. Select the providers whose services you want to order.

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



Place Order

Listing Price: $ 500,000.00	Sales Price: $ 510,000.00	Escrow/Closing No.
Transaction ID: 27217-26541	Year Built/Age: 1974/32	Escrow/Closing: Jack Johnson
Representation/Status: Seller/Pending	Contract Acceptance: 03/13/2006	Estimated Closing Date: 04/12/2006
Property Address: 1234 Test Drive San Jose , CA 95132	Seller(s): Chris Seller	Buyer(s): Benji Buyer
	Seller's Agent: Star Blake	Buyer's Agent: Julia Listingagent
MLS No.	APN:	

Service Provider:	Jack Johnson	**Phone:**	408-888-8888
Company:	Hoaky Escrow	**Fax Number:**	
Address:	1452 Hoaky Lane San Jose, CA 95132	**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	Benji Buyer		None	○ Yes ◉ No
Buyer's Agent	Julia Listingagent The Real Estate Co		None	○ Yes ◉ No
Seller	Chris Seller		None	○ Yes ◉ No
Seller's Agent	Star Blake Hope Realty	949-221-3493	Email: service@qa.trpoint.com	○ Yes ◉ No
Closing	Jack Johnson Hoaky Escrow	408-888-8888	None	○ Yes ◉ No
TC	Angel Ochoa Branch B -Hope Realty	949-221-3493	Email: angel@mail.qa.trpoint.com	○ Yes ◉ No

Other Information Order Details

Documents Attached:

Attach Documents

Attached Documents

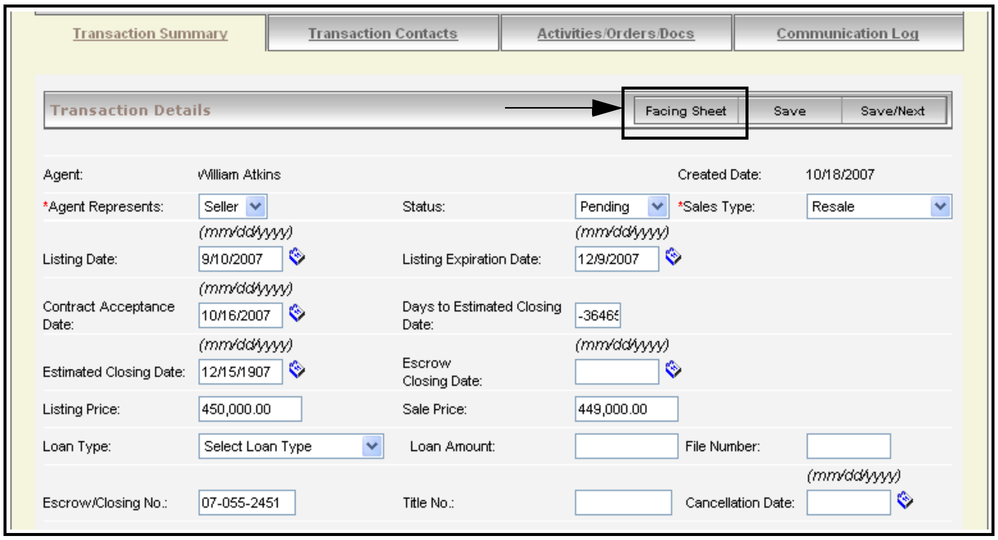
Special Instructions:

Cancel | 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.

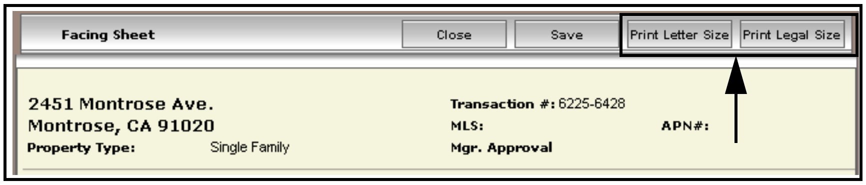


You may exclude the following areas in the printed version of your facing sheet by clearing the check box for those areas to exclude:

- 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.



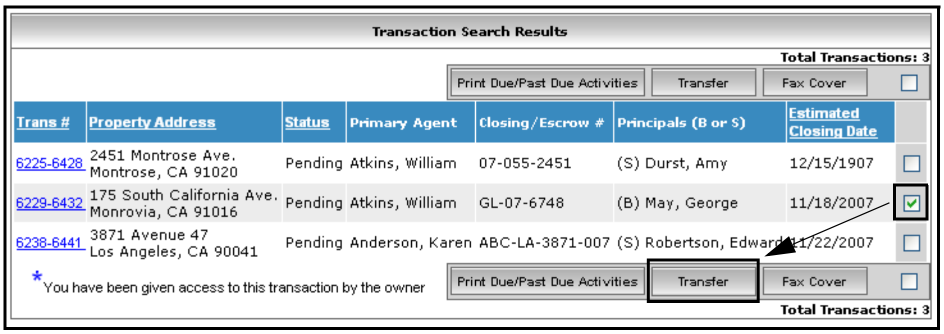
Transferring Transactions

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.

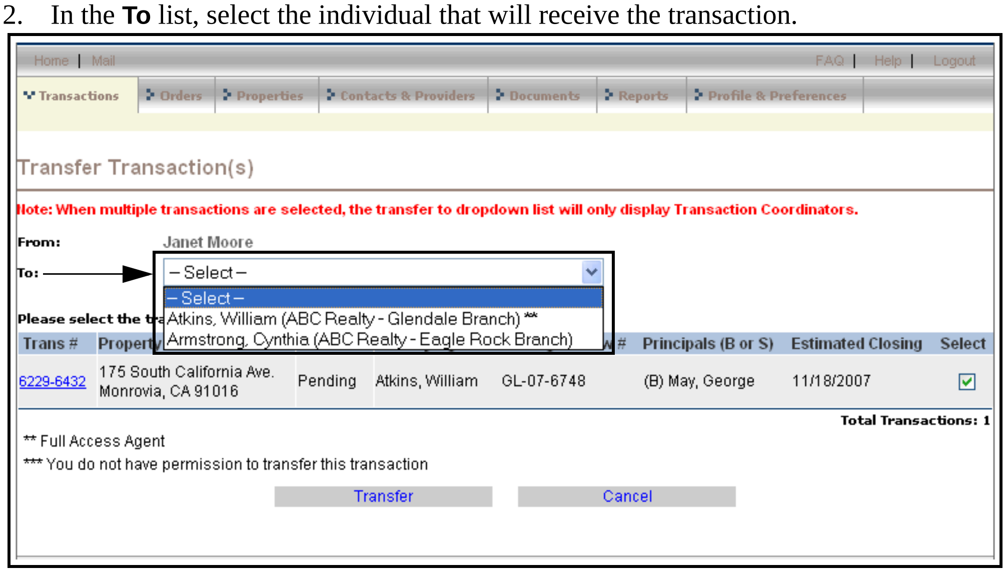
Completing a Transfer

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.



> **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.

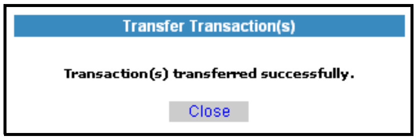
2. In the **To** list, select the individual that will receive the transaction.



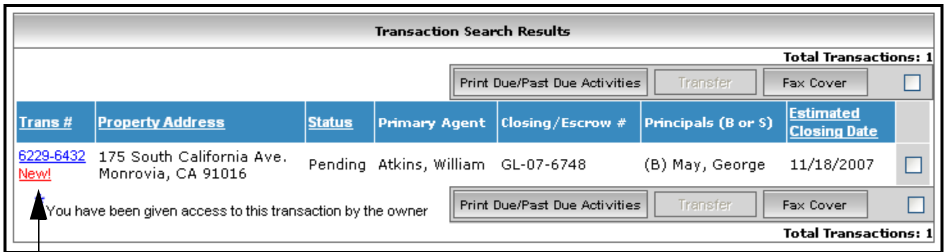
In this example, the first selection is a Full Access Agent, as noted by the asterisks. The second selection is a Transaction Coordinator.

> **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.



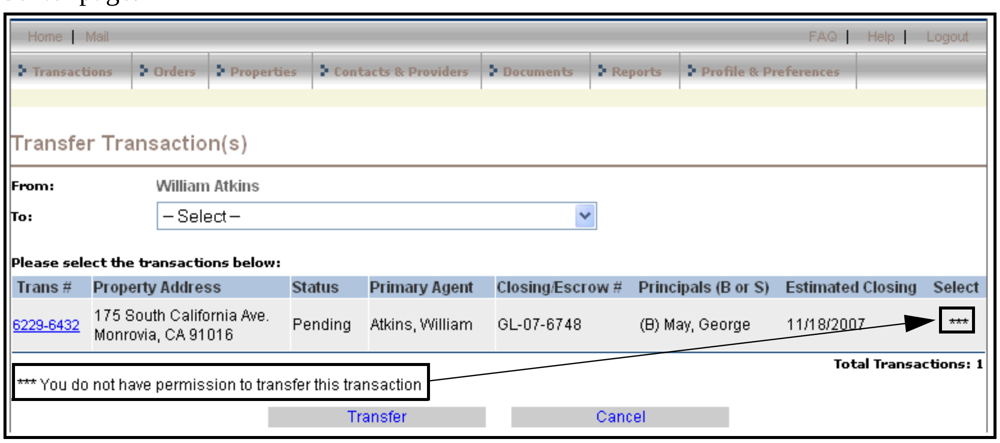
The transaction now appears in the Transaction Center of the new owner.



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

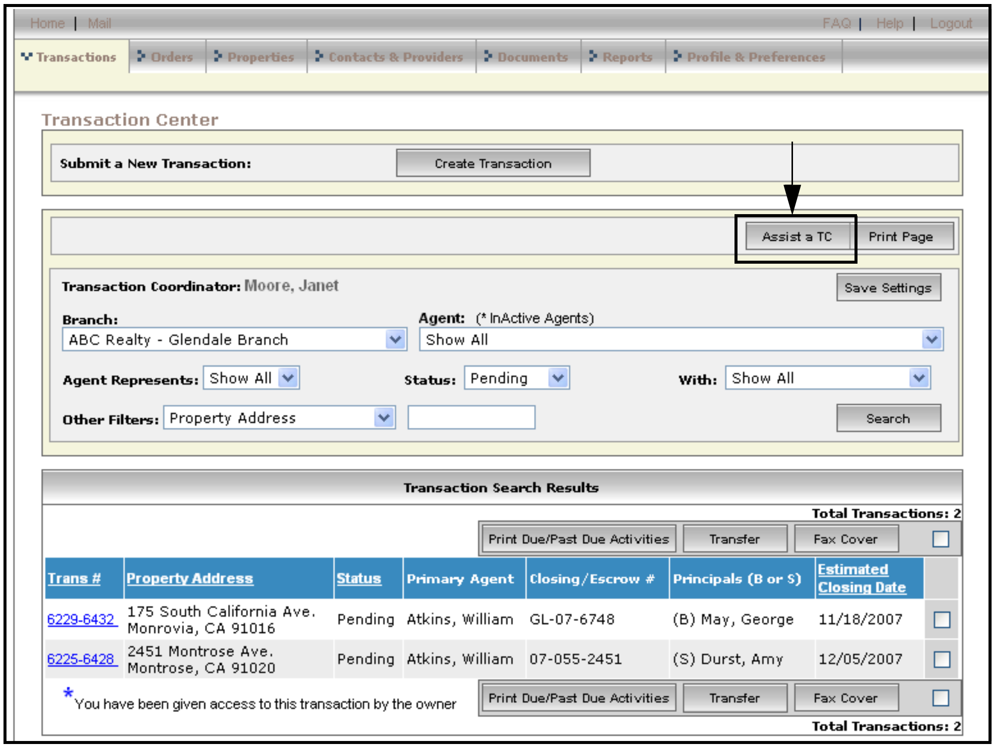
The **Assist a TC** function allows you to work transactions owned by another transaction coordinator if you have that transaction coordinator's **Assist a TC** password.

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

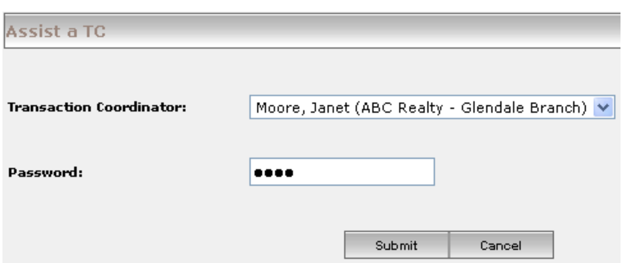
1. Click **Transactions** tab.

2. Click **Transaction Center**. The **Transaction Center** page appears.

3. Click **Assist a TC**. The **Assist a TC** page appears.



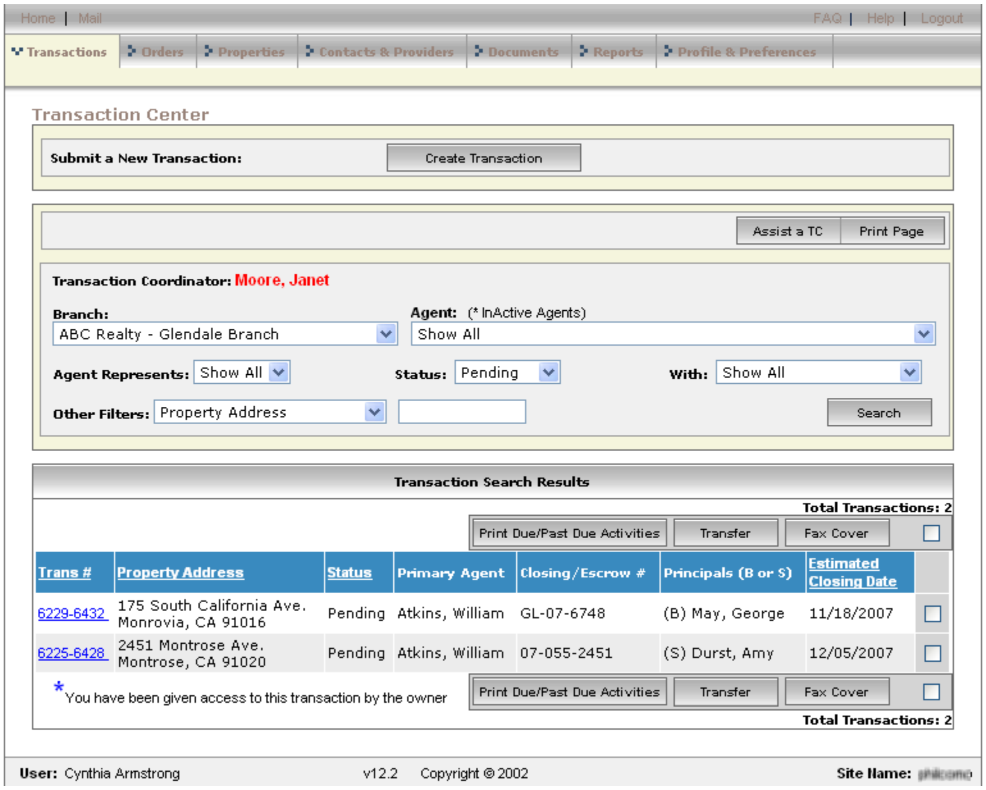
4. Select the **Transaction Coordinator** from the list.



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.



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.

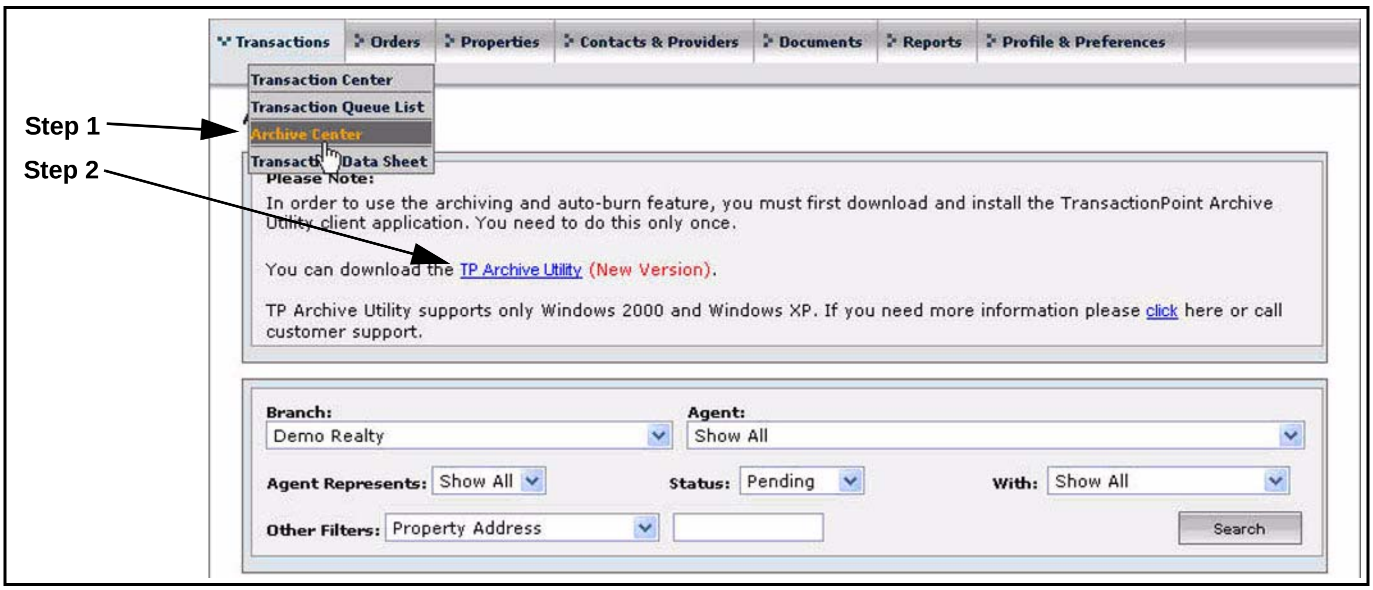
Archive Center

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

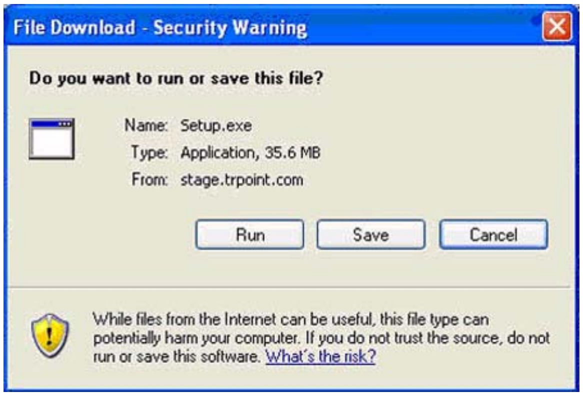
Note: If you have not installed the current TP Archive Utility, follow the steps below to install or update the software. This must be done before you burn CDs.

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**.

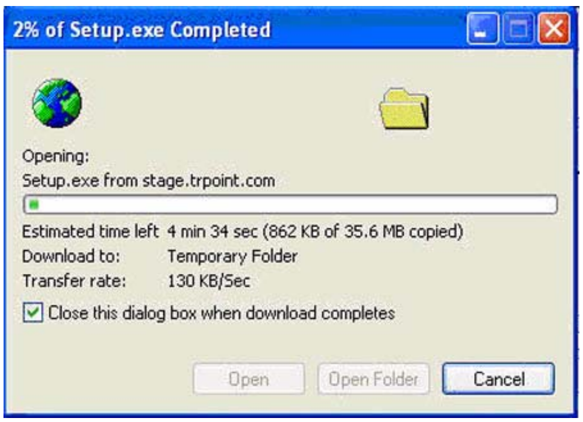


2. In the Archive Center, click on the link: **TP Archive Utility** to download the software.

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

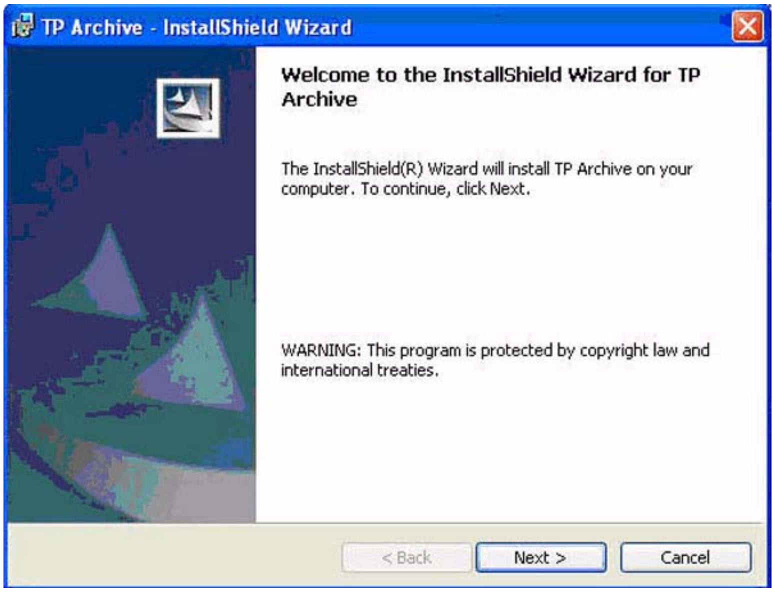


The screen below is shown to indicate that the software is installing on your computer:

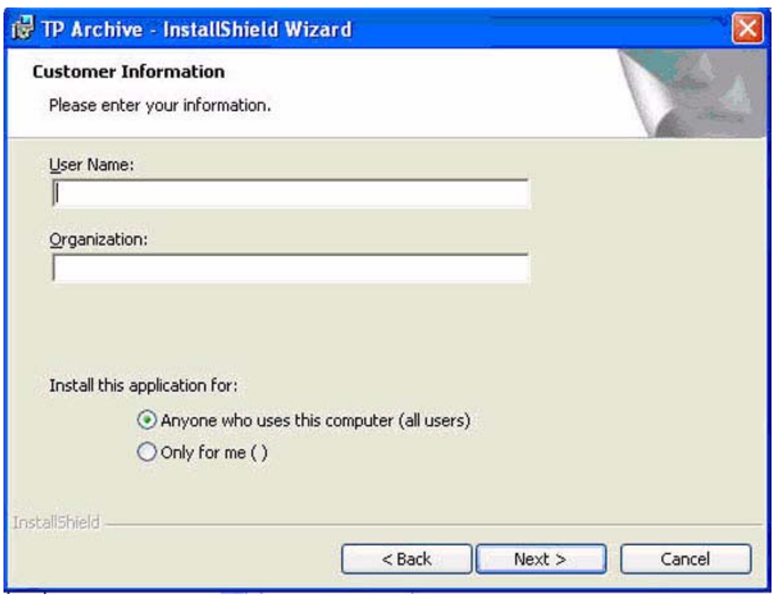


4. Click **Run** in the Security Warning window (shown below) that pops up.

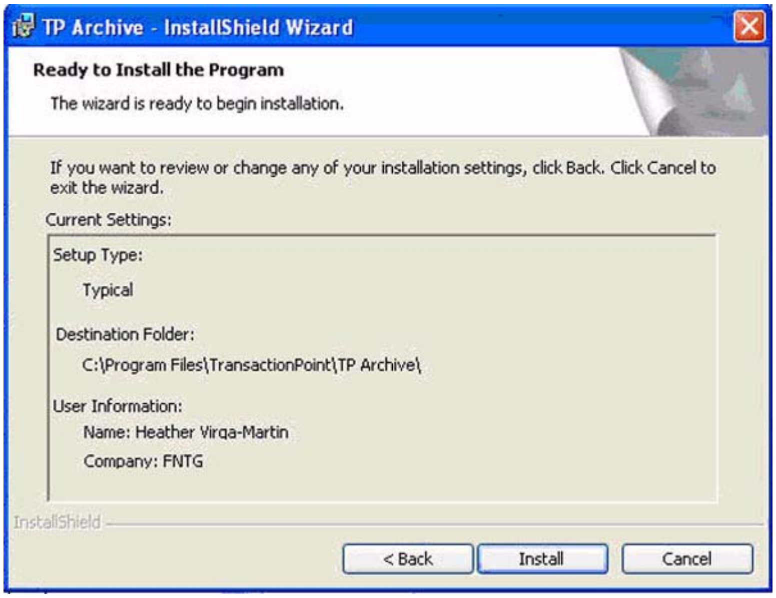
5. Click **Next** in the TP Archive-InstallShield Wizard window (shown below) that pops up.



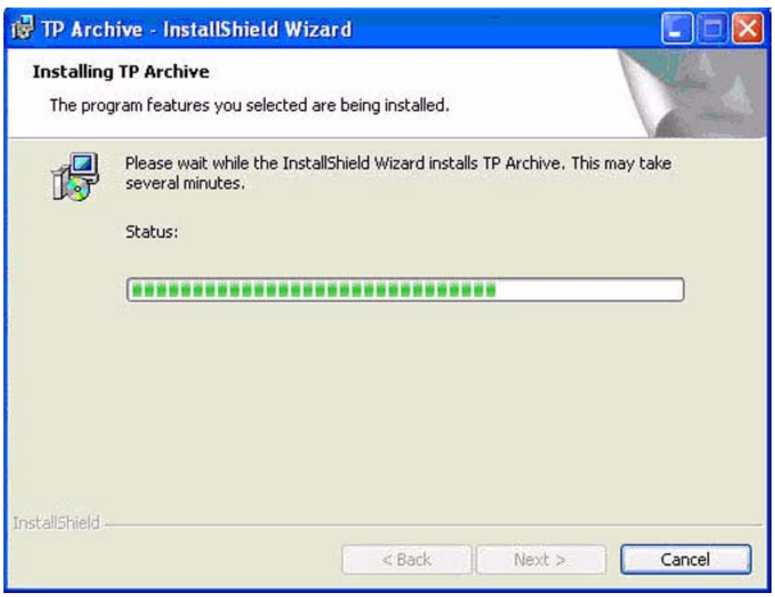
6. Type your name and company name, select **Anyone who uses this computer (all users)**, and click **Next**.



7. Click **Install**.

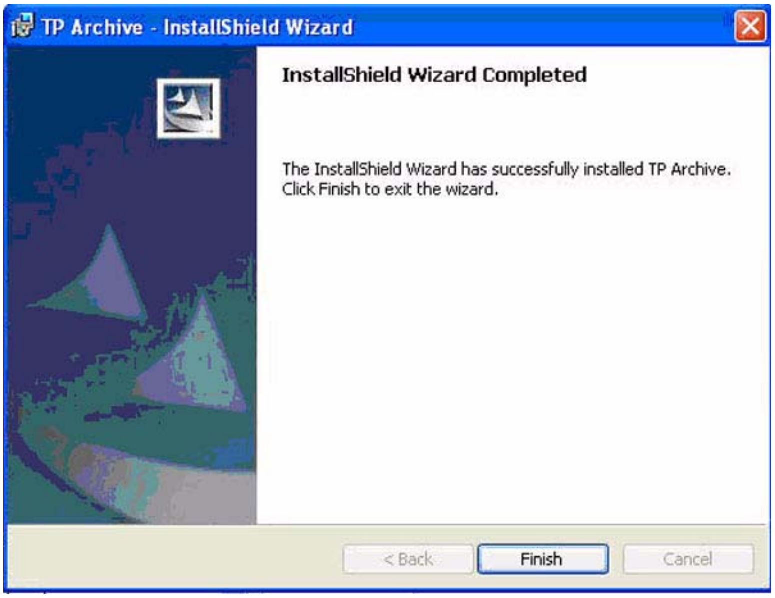


The **Installing TP Archive** window appears.



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

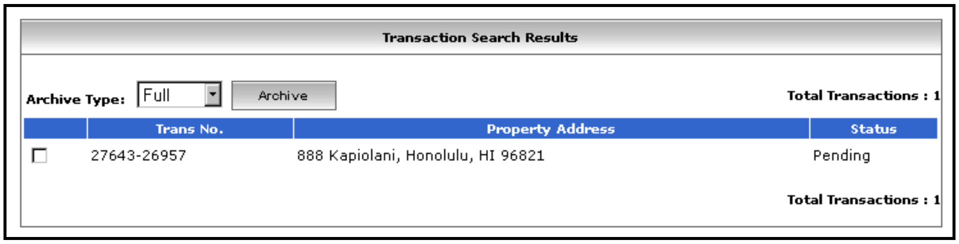
   You are now ready to archive transactions**.**



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.



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.

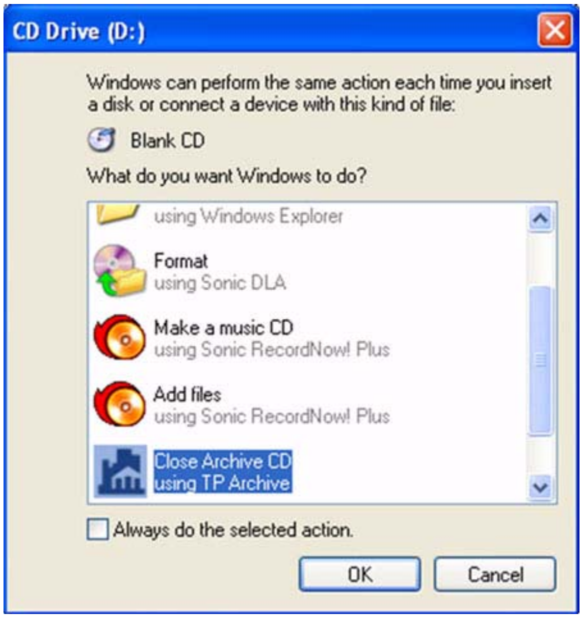
   Custom - Allows you to archive a customized list of documents and activities. Customized archive is available when you upload documents directly to TransactionPoint or fax documents into TransactionPoint using the fax cover sheet. This feature can also be made available using defaults set in the Activities 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.

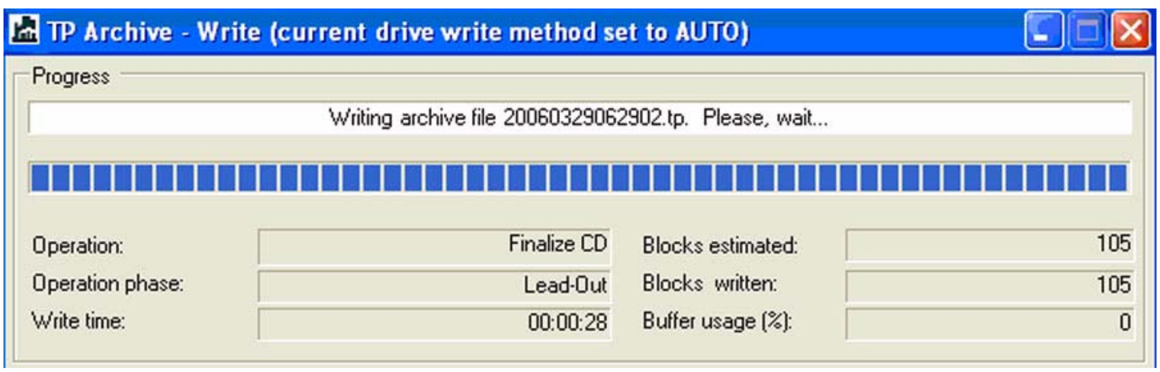
   Seller - Allows you to archive all seller documents.

3. Insert a blank CD.

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

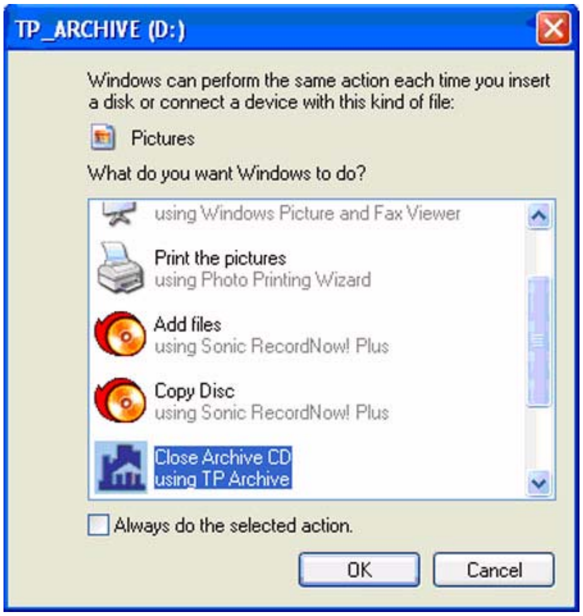


4. Click **Open**. The TP Archive Write window appears.



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

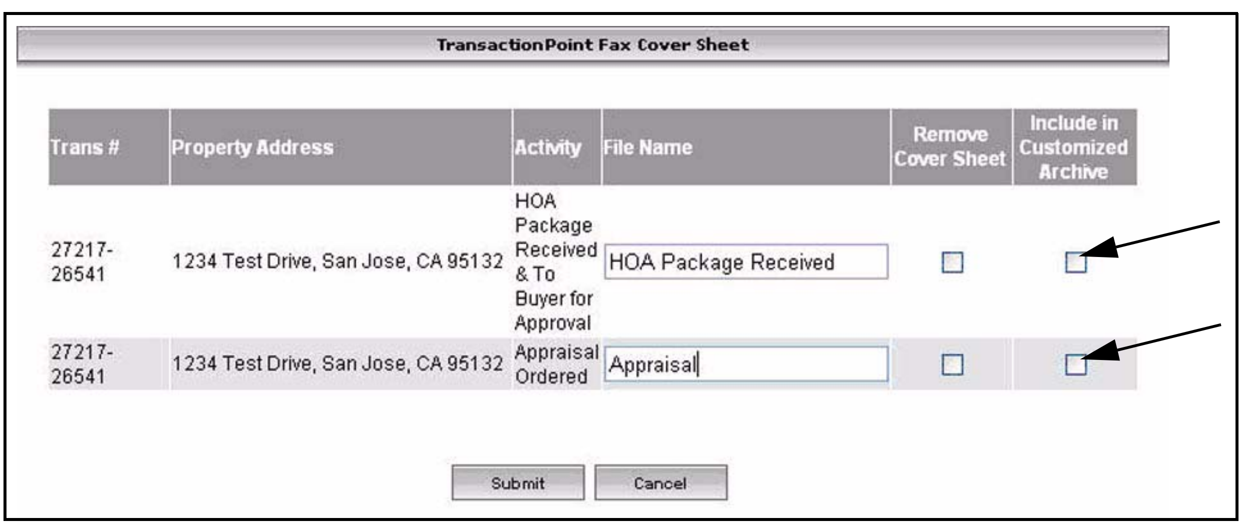
Archived on 9/14/2005 4:47:56 PM (PDT)

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	HOA Package Received	☐	☐
27217-26541	1234 Test Drive, San Jose, CA 95132	Appraisal Ordered	Appraisal	☐	☐

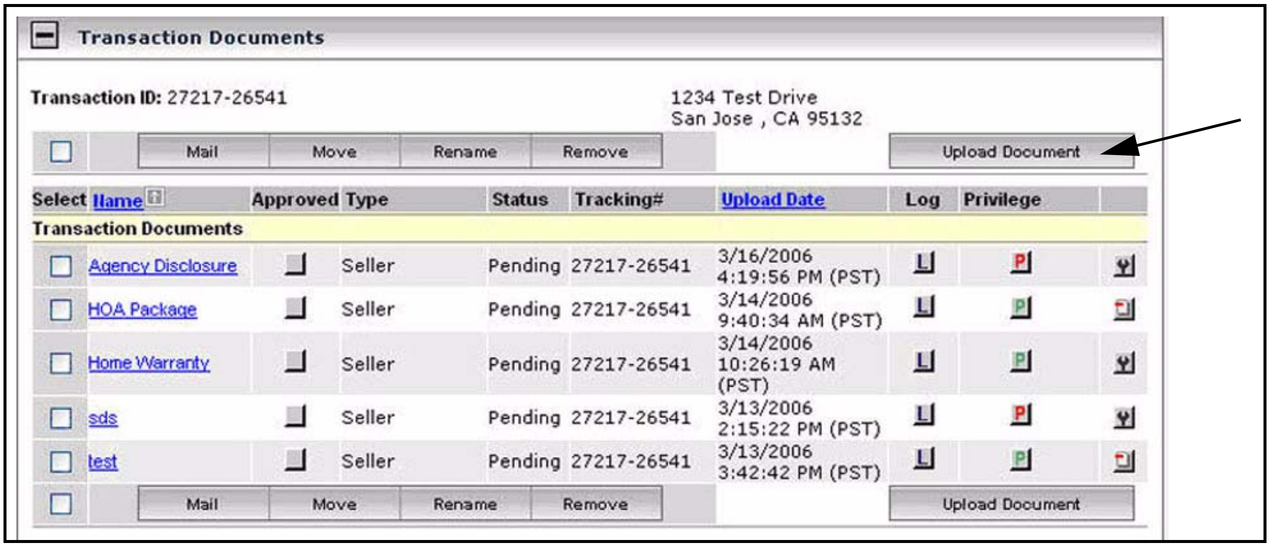
Submit Cancel

Including a Document Using the Upload Feature

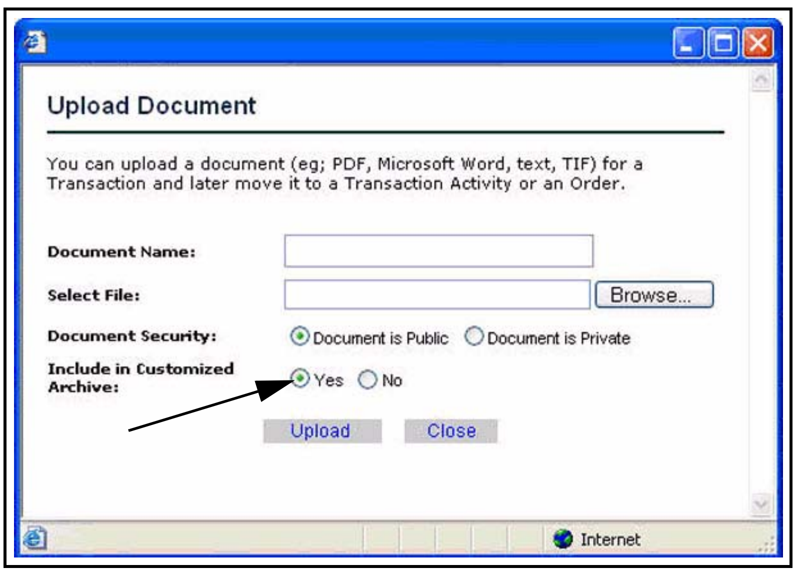
Note: Documents can be split and renamed as multiple PDF files after uploading. See *Splitting a Document into Multiple Documents* on page 93.

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 Upload Document window appears:



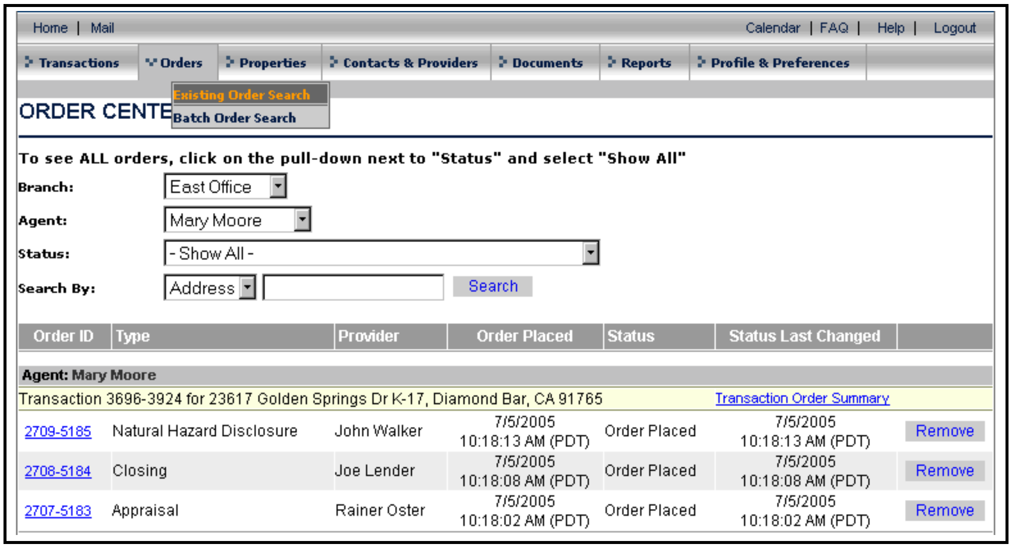
2. Click **Yes** next to **Include in Customized Archive**.

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.



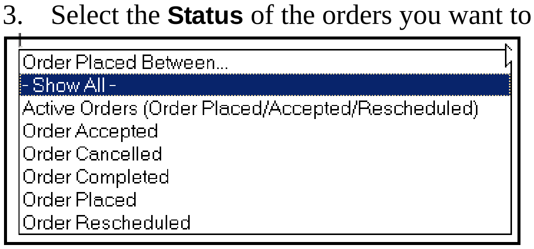
From the Order Center, you can work with individual orders or remove an order if the status is **Order Placed**.

Viewing Orders

1. Select the **Branch**.

2. Select the **Agent**.

3. Select the **Status** of the orders you want to view.



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**.

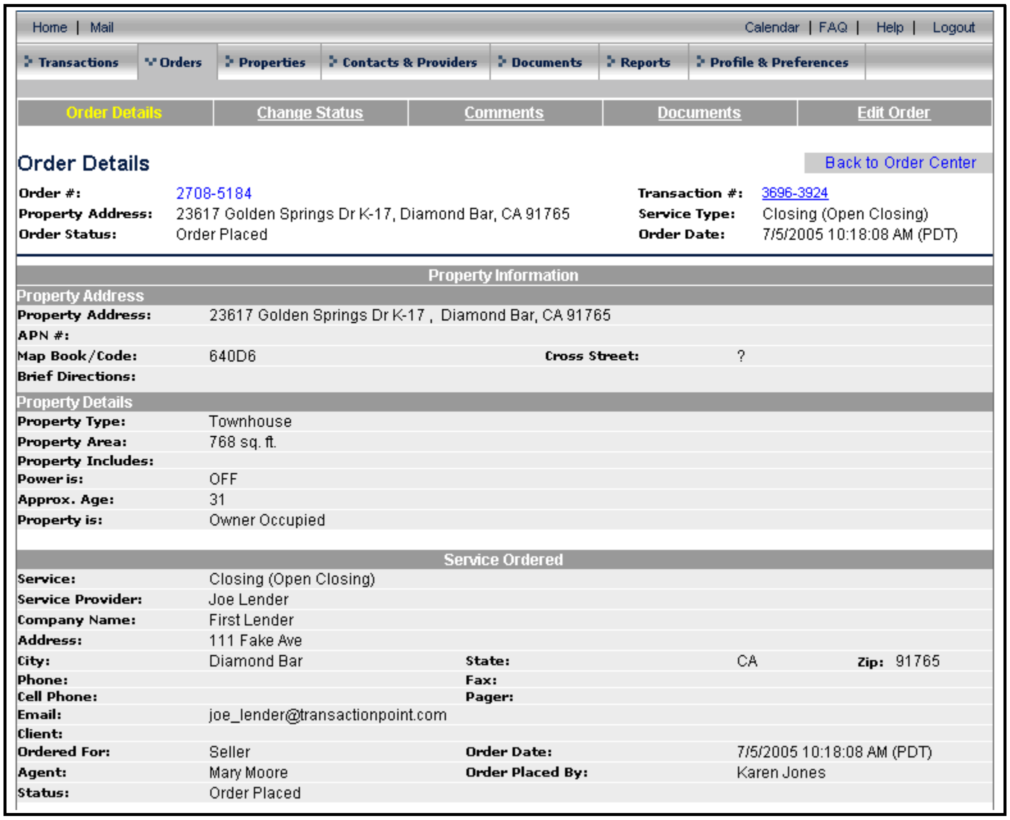
6. Enter at least two characters in the **Search By** field.

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.



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					
Buyer's Agent					
Name:	John Test NS VORLTR 34				
Company:	John Test New Server				
Address:	2510 Redhill Santa Ana CA 92705 USA				
Work Phone:	1234567890	**Cell Phone:**	1234567890		
Fax:	1234567890	**Pager:**	1234567890		
Email:	raphael.zarate@fnf.com				
Seller's Agent					
Name:	Mary Moore				
Company:	East Office				
Address:	2510 Redhill				
City:	Santa Ana	**State:**	CA	**Zip:**	92705
Country:	USA				
WorkPhone:	999-999-9999	**Cell Phone:**			
Fax:		**Pager:**			
Email:	mmoore@transactionpoint.com				

Transaction Coordinator Information					
Name:	Karen Jones				
Company:	East Office				
Address:	2510 Redhill				
City:	Santa Ana	**State:**	CA	**Zip:**	92705
Country:	USA				
Work Phone:	777-222-4015	**Cell Phone:**			
Fax:	7775553015	**Pager:**			
Email:	kjones@transactionpoint.com				

Clients
Buyer
Buyer's Details Not Entered
Seller
Seller's Details Not Entered

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

Status History and Comments

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

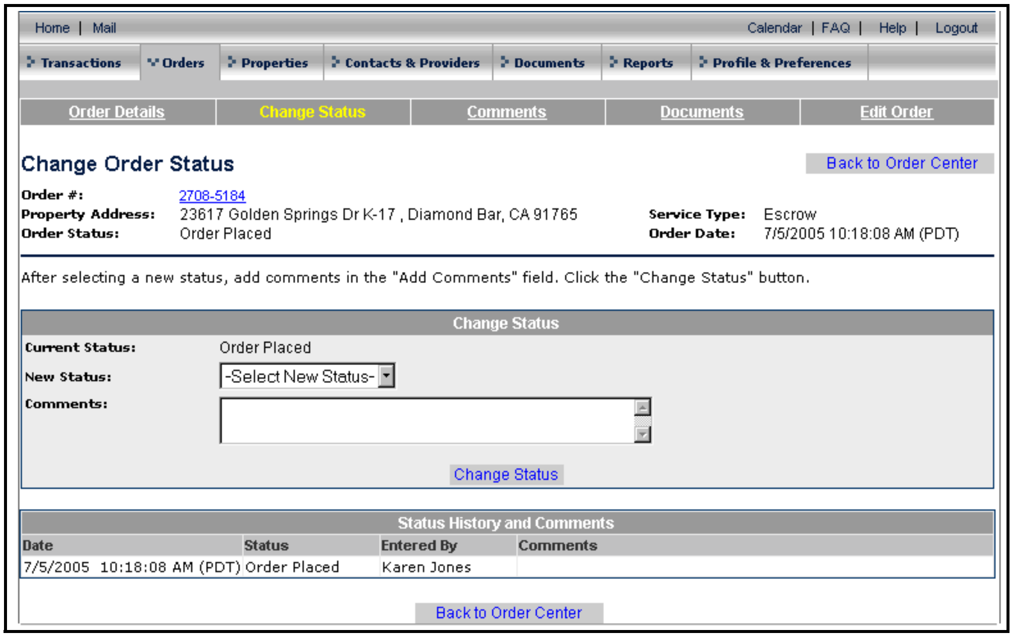
The bottom section of the **Order Detail** page displays:

- 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.

The **Change Order Status** page appears.



2. Select the **New Status**.

3. Add **Comments** to explain the reason for the status change.

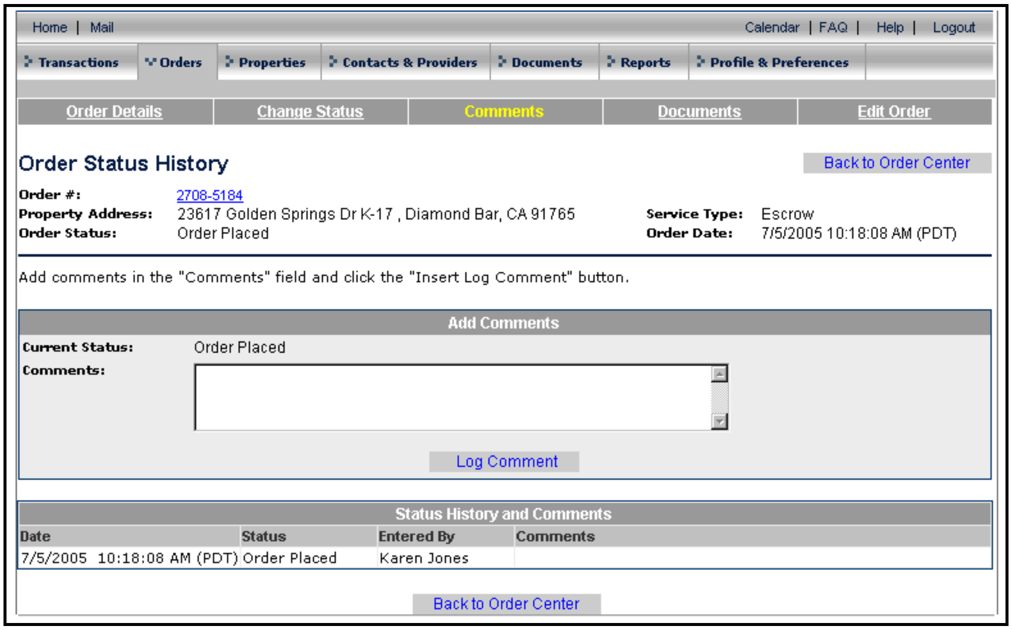
4. Click **Change Status**.

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.

The **Order Status History** page appears.



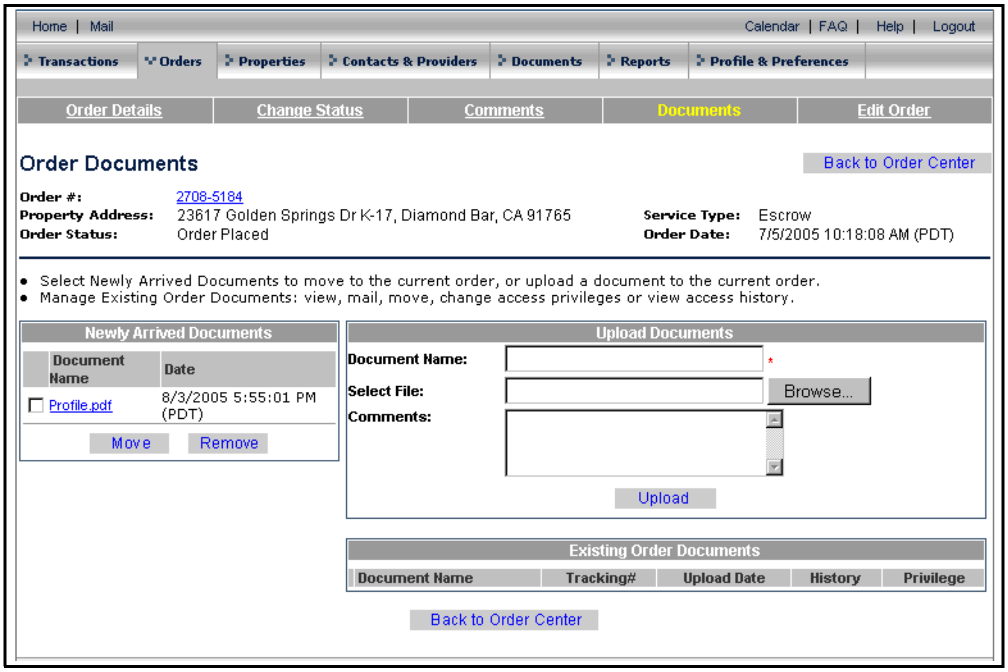
2. Enter the **Comments**.

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.

The **Order Documents** page appears.



2. Type a **Document Name**.

3. Click **Browse** to search for the document.

4. Double-click on the name of the document you with 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.

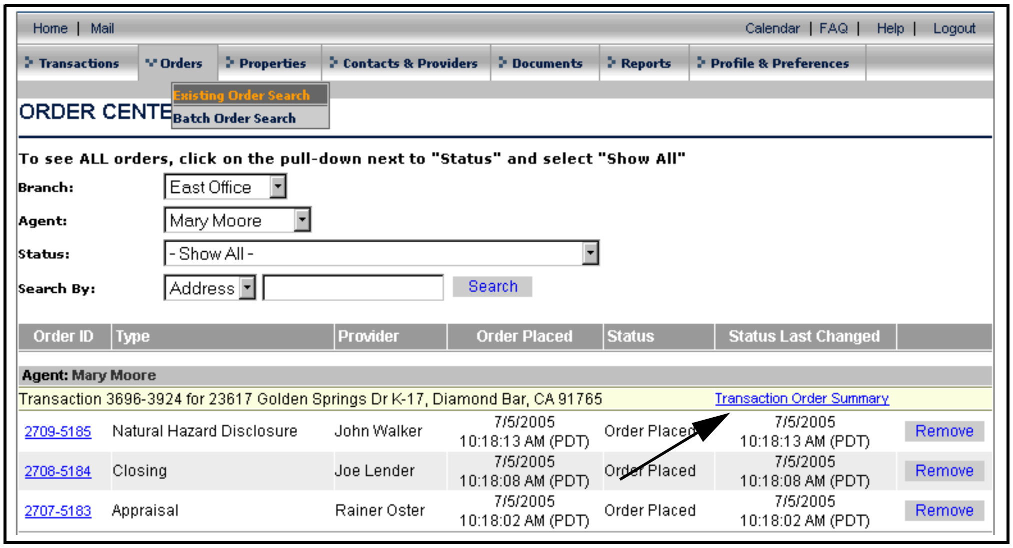
2. Make the necessary changes.

3. Click **Submit**.

Viewing a Transaction Order Summary

1. Click the **Orders** tab.

2. Click **Existing Order Search**. The **Order Center** page appears.



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 — Back

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.

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				
2974-5461	2/1/2006	2/14/2006		
3162-5649	5/1/2006	5/8/2006		
3176-5663	5/17/2006			
Lead/Paint Inspection				
3154-5641	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				
3087-5574	3/13/2006	3/14/2006		3/24/2006
Credit				
Flood				
Home Services				
Home Warranty				
3155-5642	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.

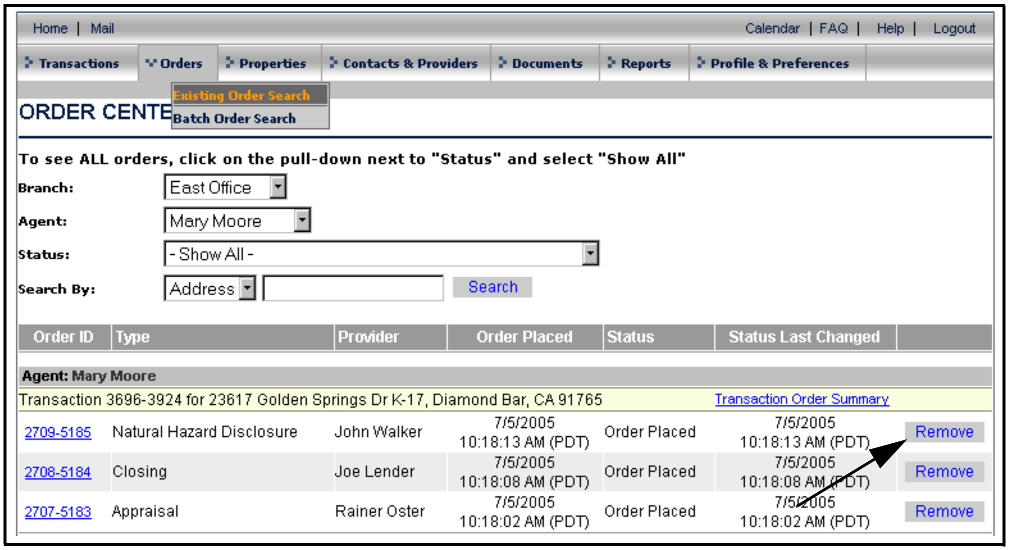
4. Click **Back** to return to the Order Center.

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.



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.

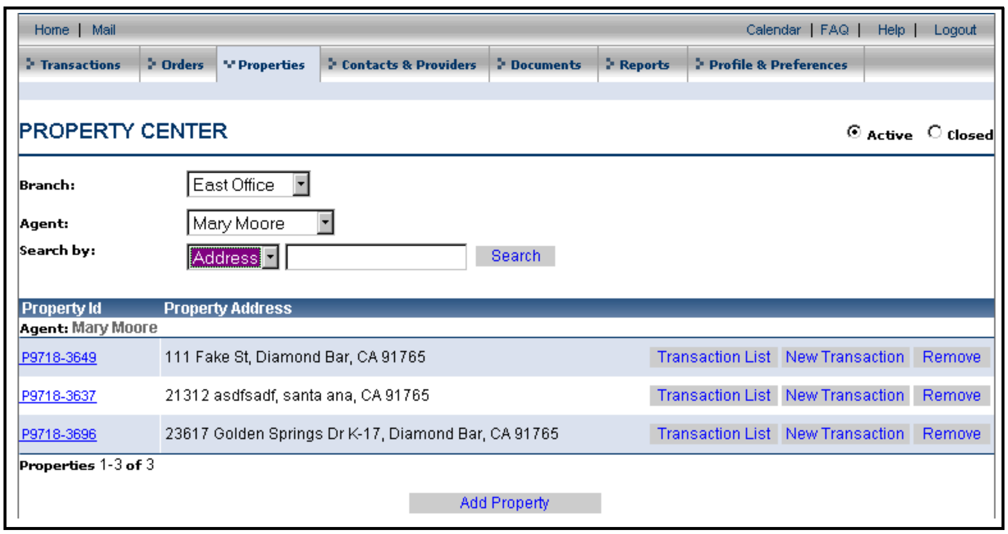
Property Center

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.

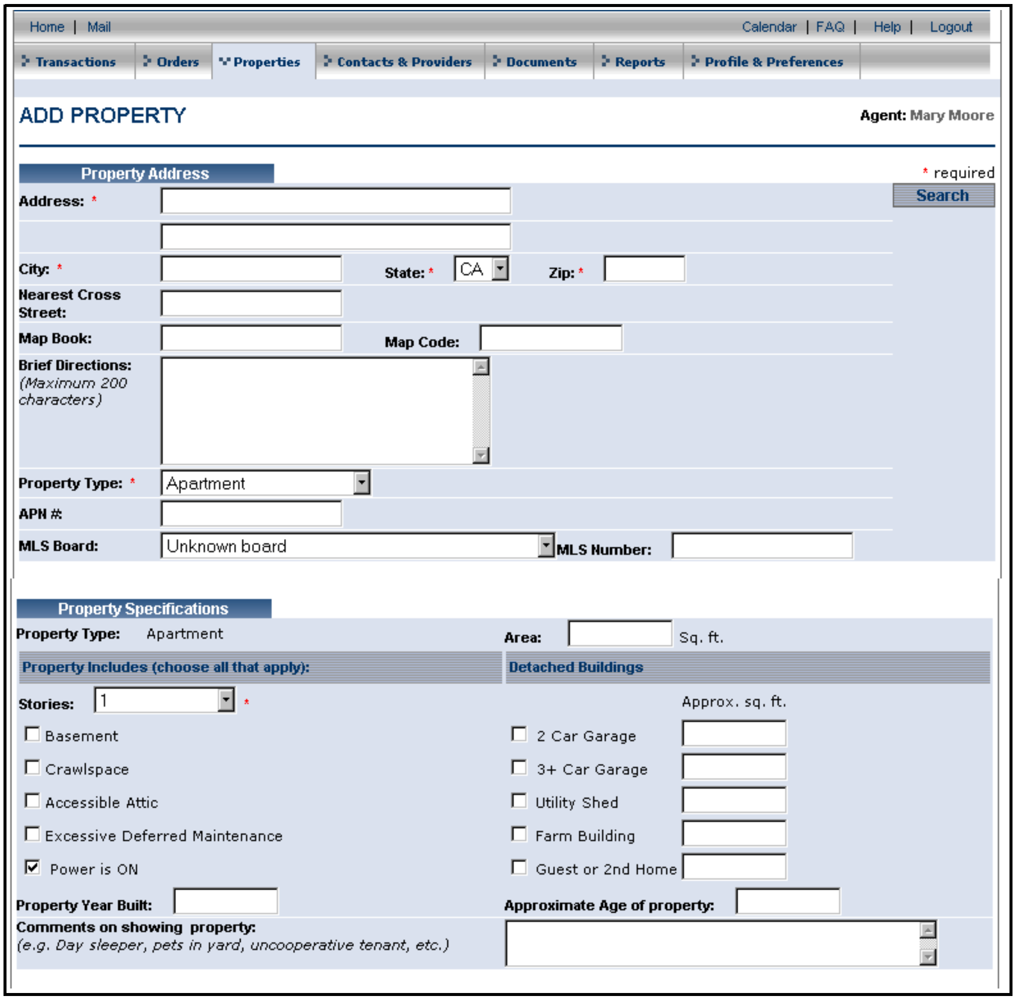


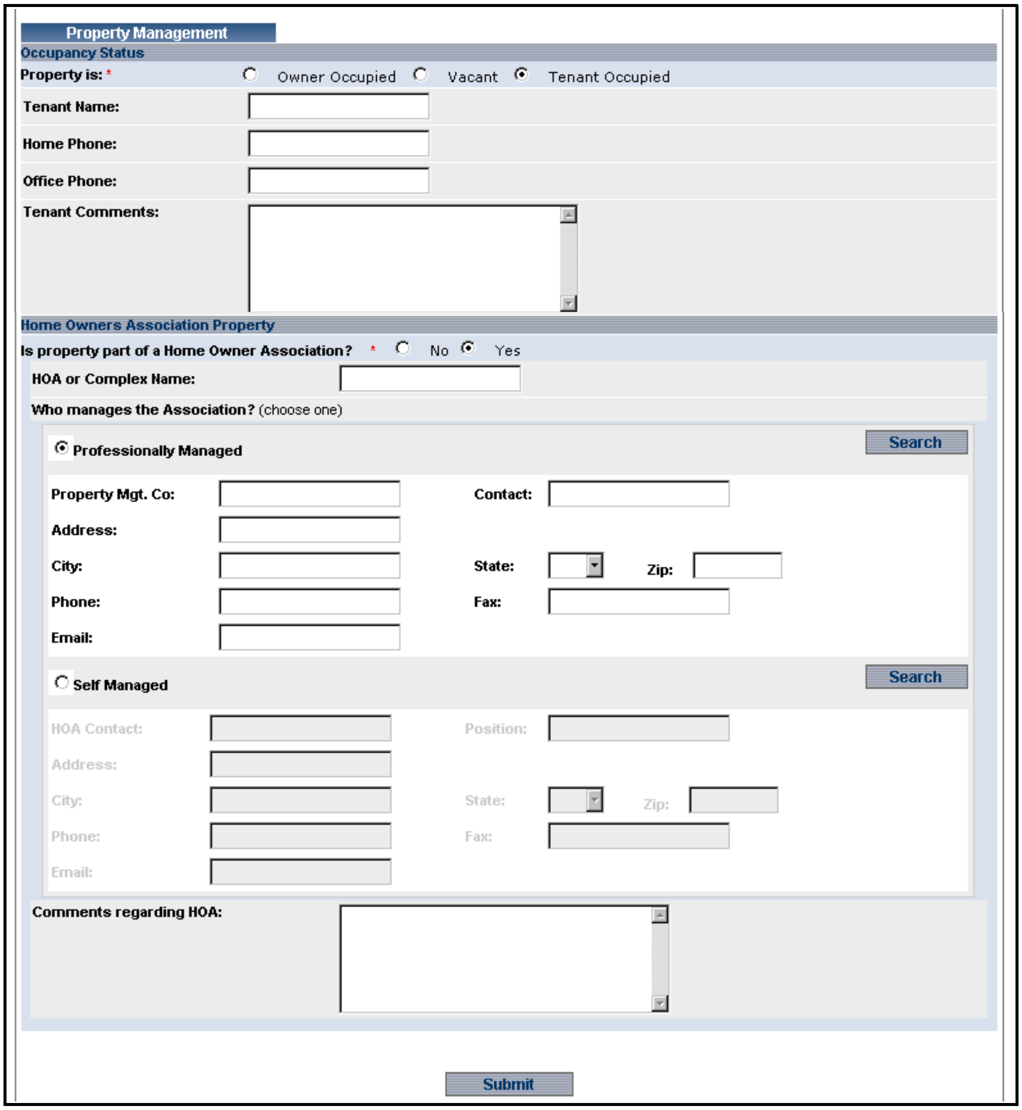
2. Select the **Branch**. If you are the coordinator for a single branch, only your active branch is listed.

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.

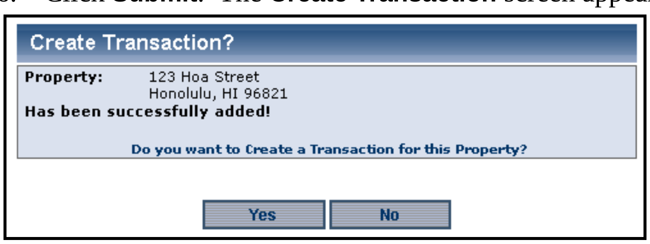
The **Add Property** page appears.





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

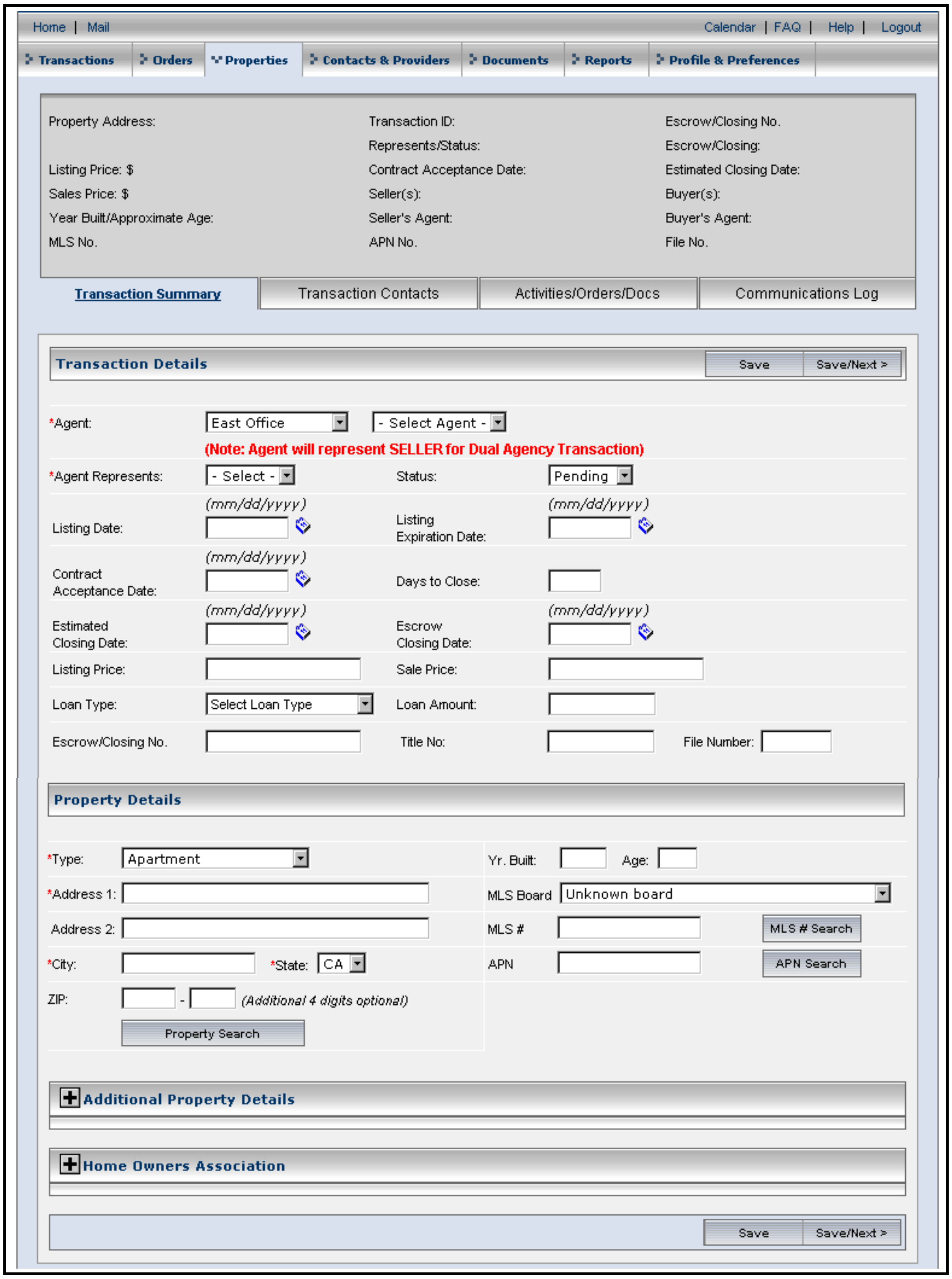
6. Click **Submit**. The **Create Transaction** screen appears.



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.

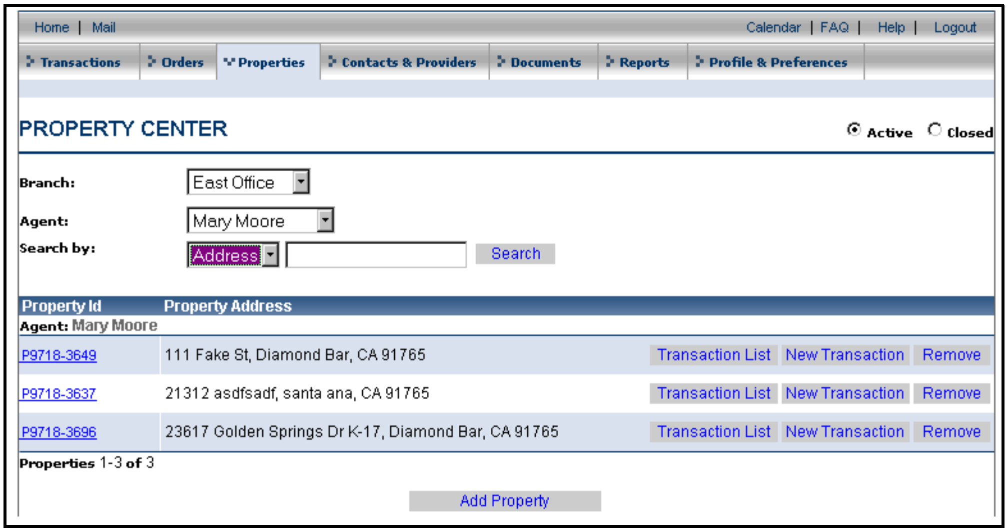


8. Enter the requested information. Required fields are marked with asterisks (*).

9. Click **Save.**

Finding Existing Properties

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



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.

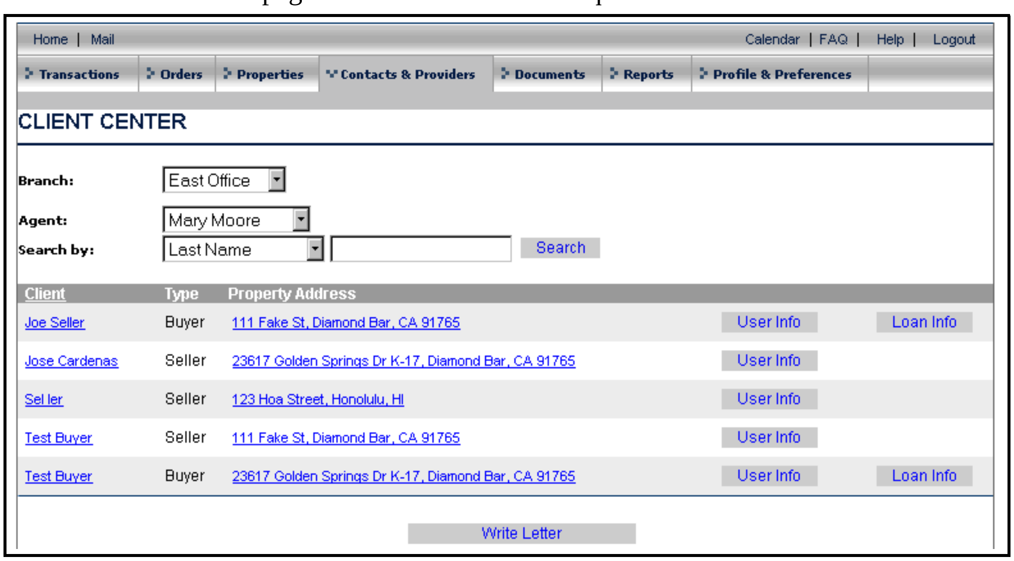
1. Select the **Branch**.

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**.)

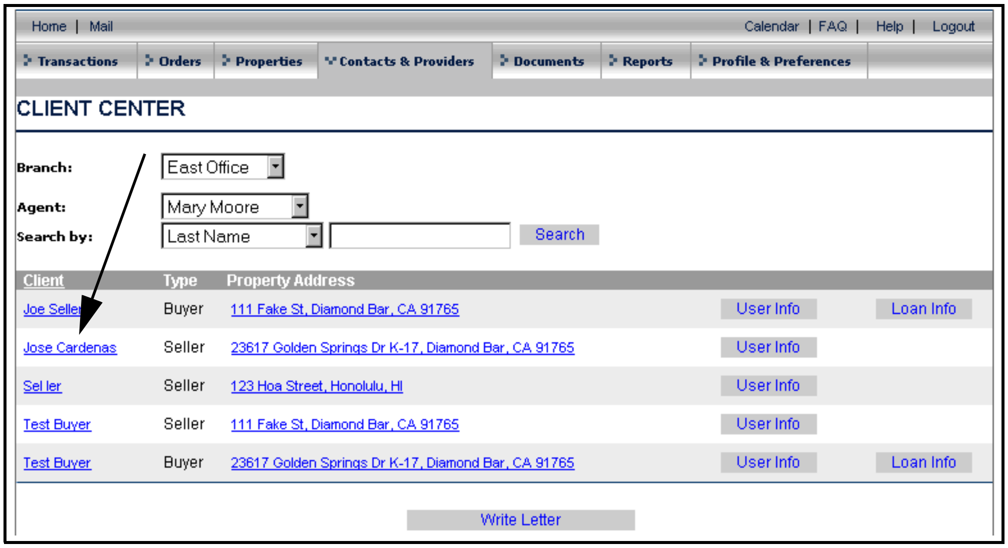
4. Type at least two characters of the name or address.

5. Click **Search**. The page refreshes to show the requested clients.

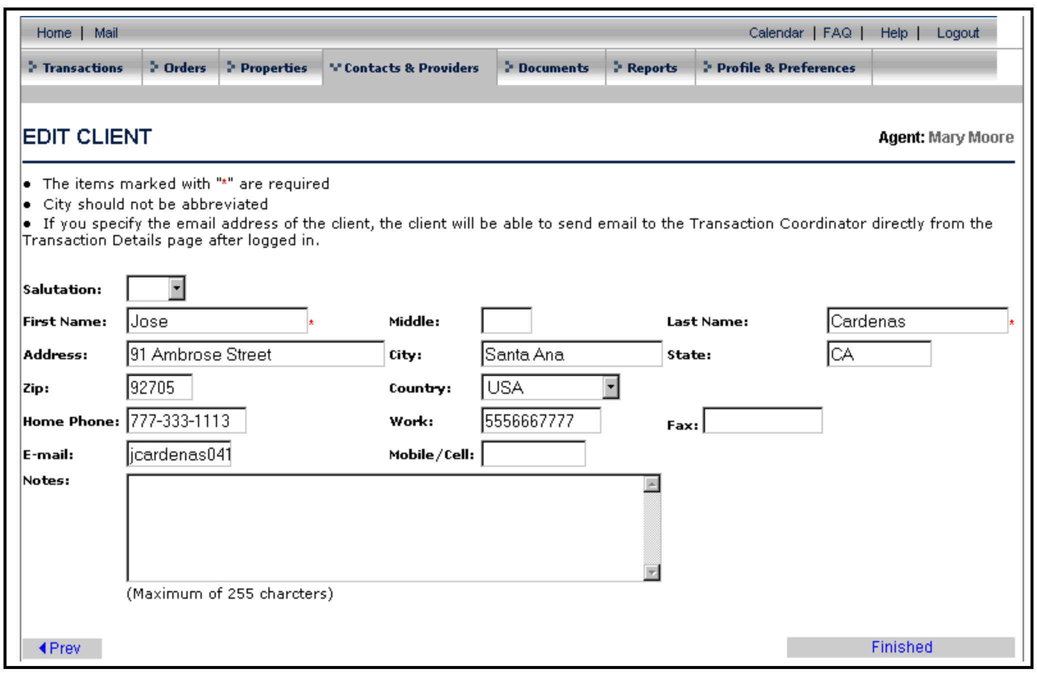


Updating Client Information

1. Click the client name.



The **Edit Client** page appears.



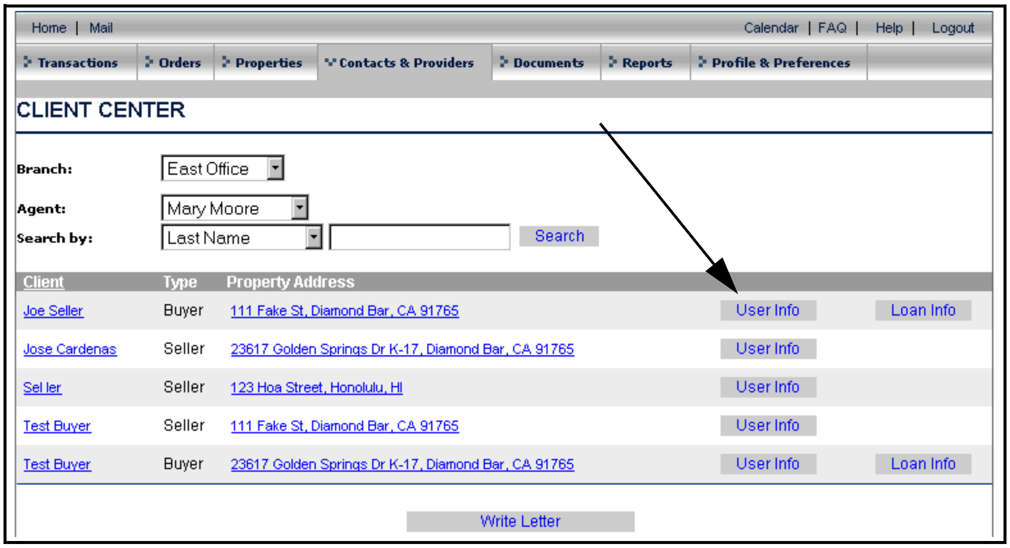
2. Edit the client information.

3. Click **Finished**.

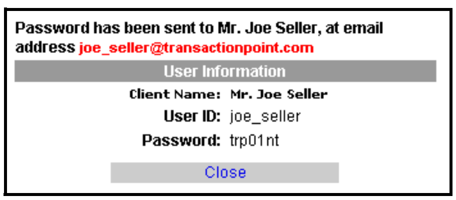
Viewing Client User IDs and Passwords

1. Locate the client in **Client Center**.

2. Click **User Info** for the client.



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.



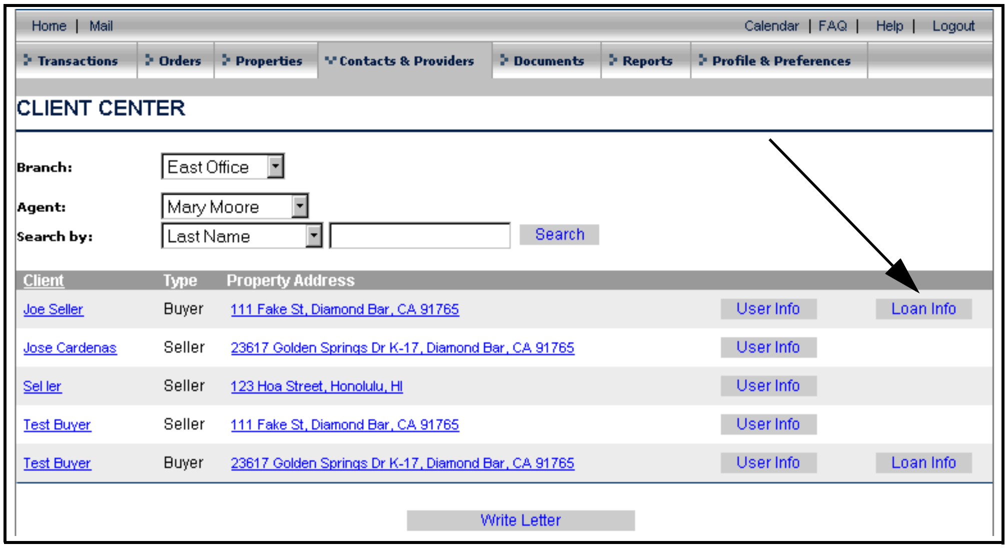
Note: Clicking the client link multiple times causes multiple messages to be sent to the client with their user ID and Password.

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.

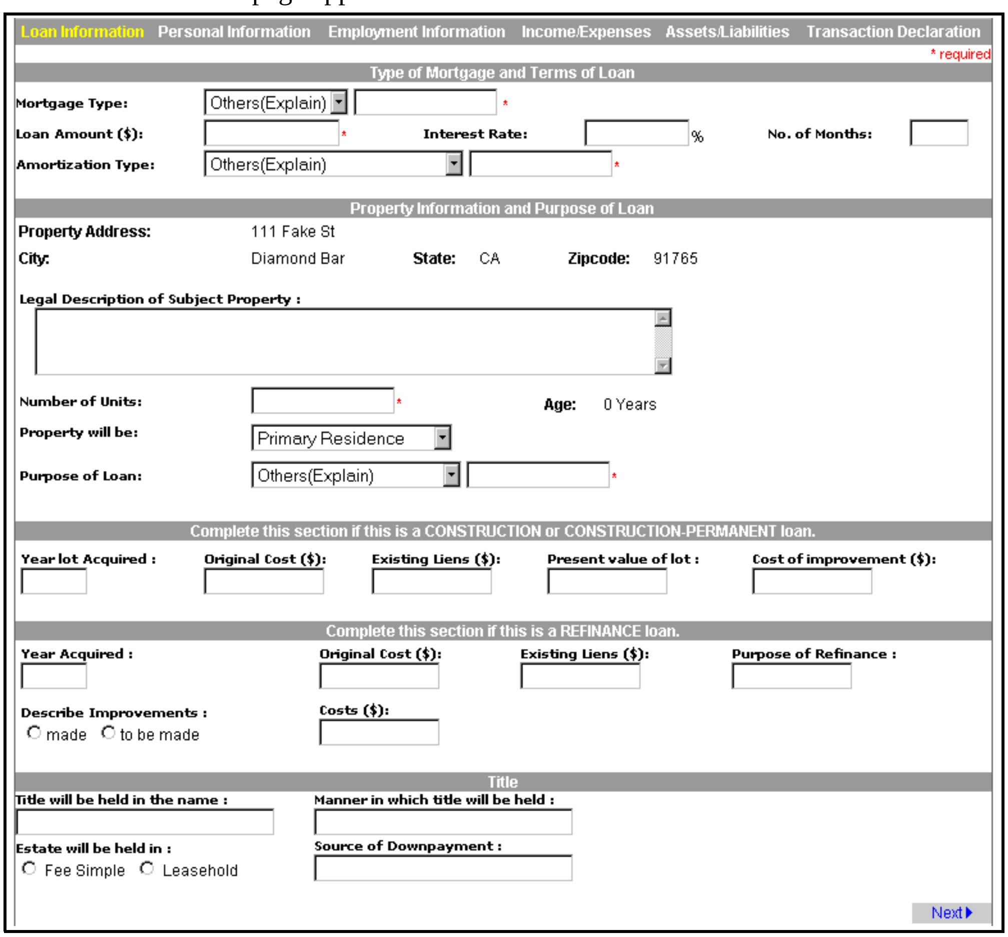
Viewing Client Loan Information

1. Locate the client in **Client Center**.

2. Click **Loan Info** for the client.



The Loan Information page appears.



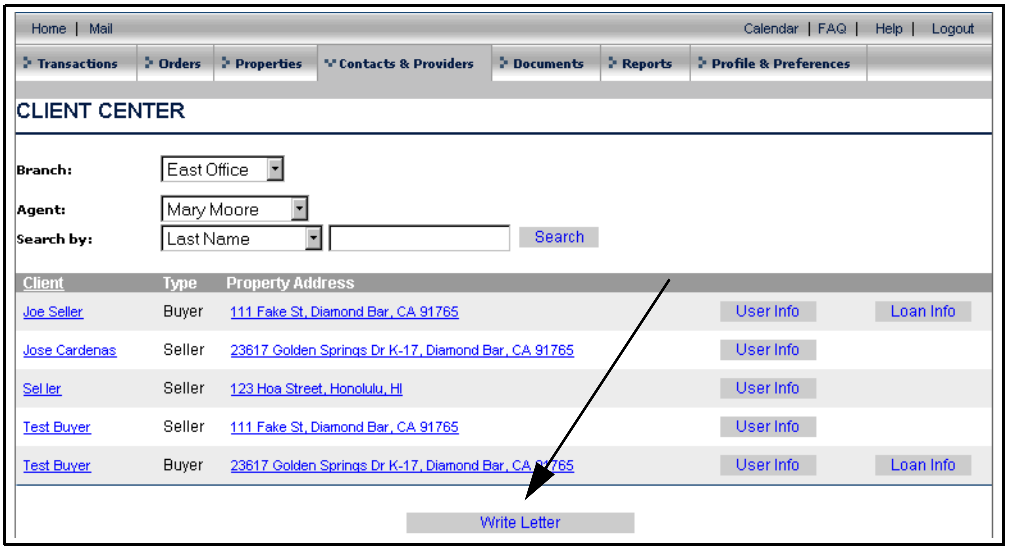
3. Edit the information as needed.

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**.



The **Write Letter** page appears.

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

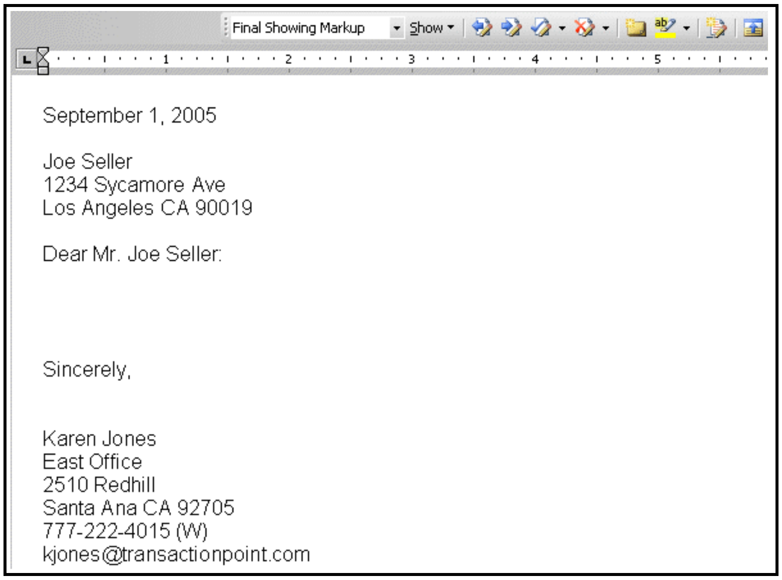
Use the scroll bar to view additional clients.

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.



September 1, 2005

Joe Seller
1234 Sycamore Ave
Los Angeles CA 90019

Dear Mr. Joe Seller:

Sincerely,

Karen Jones
East Office
2510 Redhill
Santa Ana CA 92705
777-222-4015 (W)
kjones@transactionpoint.com

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® functions to save the letter to a file for emailing to the client, or you may send the letter to the printer.

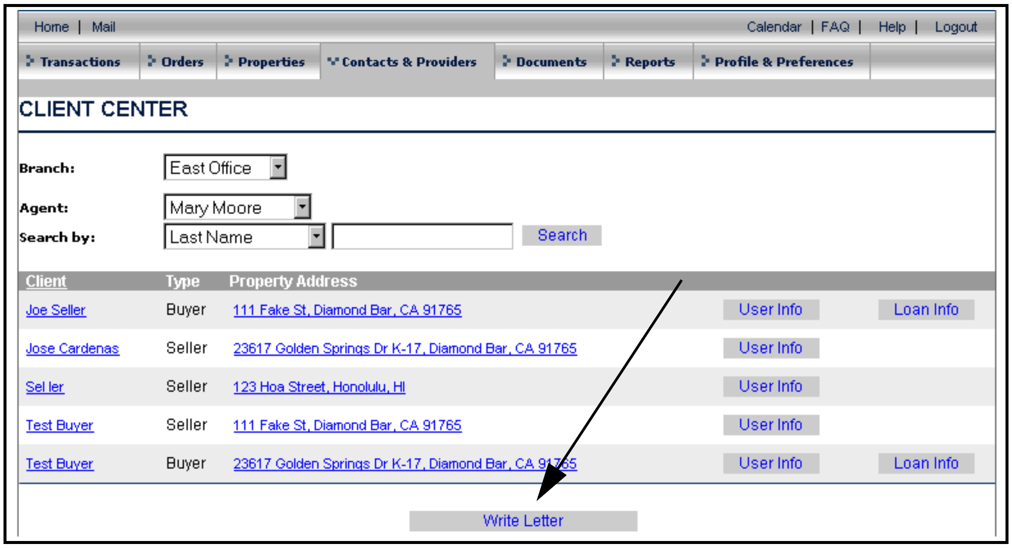
Using Letter Templates

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.

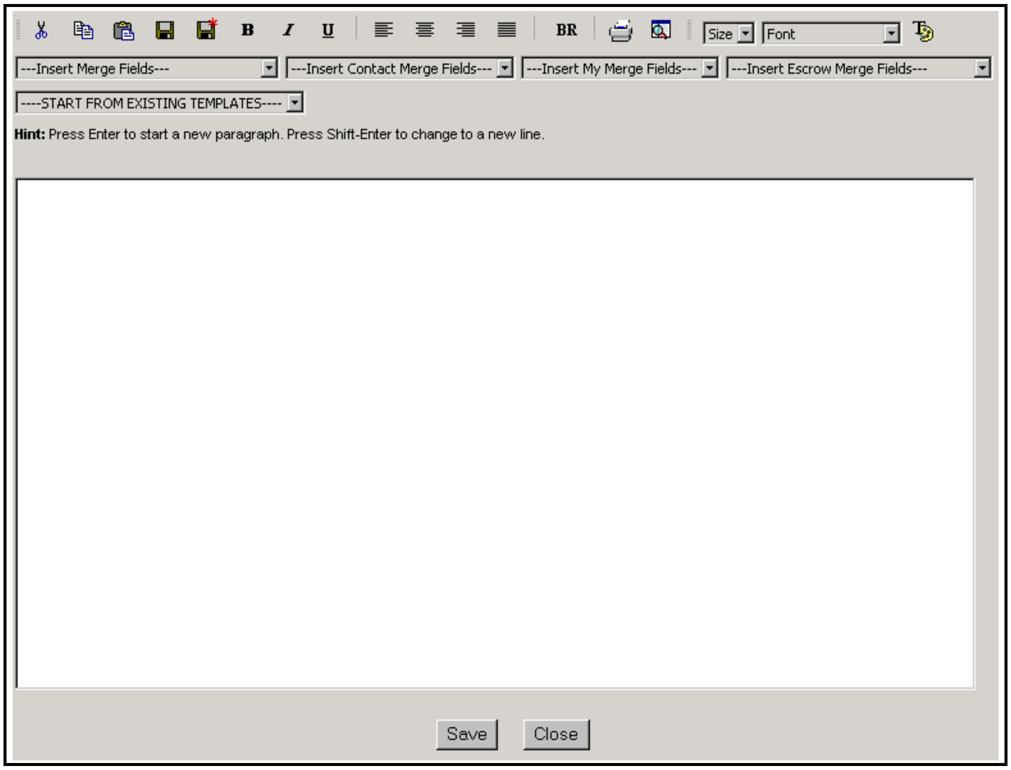
1. Click **Write Letter**.



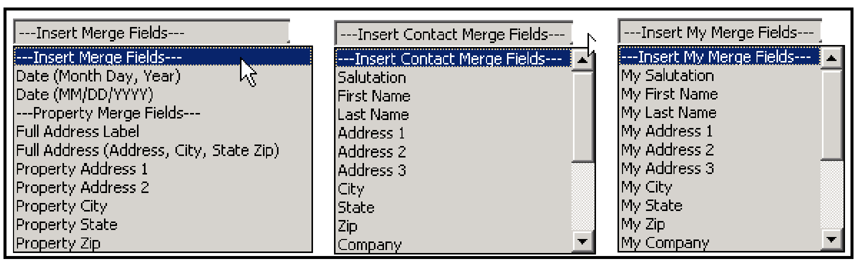
The **Write Letter** page appears.

2. Click **New**.

The Template creation page appears.



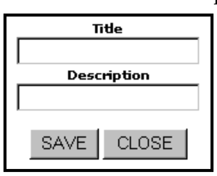
3. Use the pull-down menus to create the template.



- **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

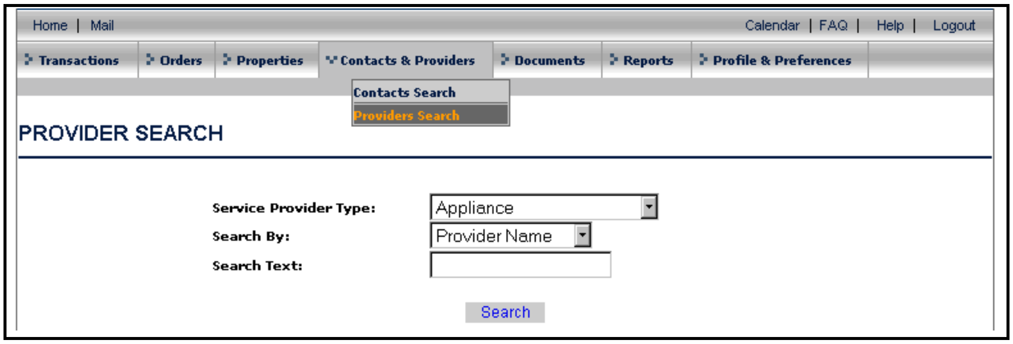
1. Select the template from the pull-down list.
2. Click **Delete**. A delete confirmation page appears.
3. Click **OK** to confirm the deletion of the selected template. The **Write Letter** page refreshes and the list of available templates is updated.

   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.

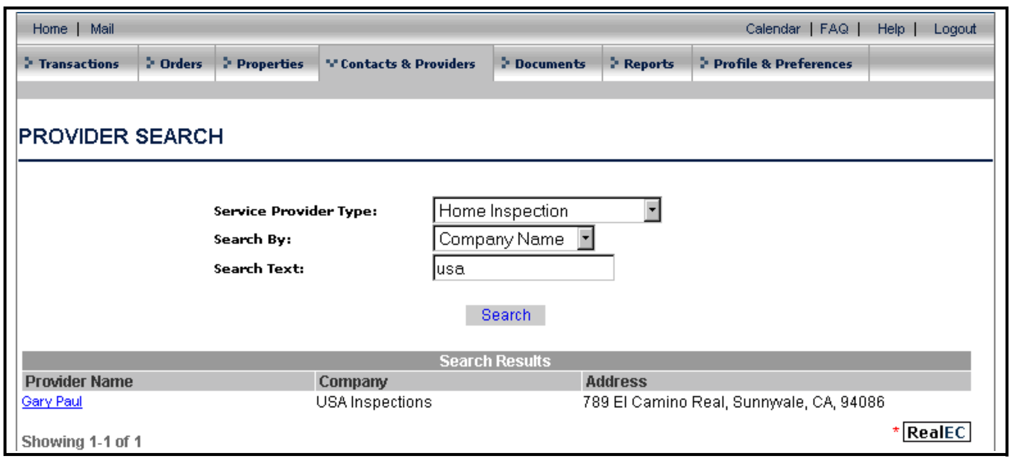


3. Select the **Provider Type**.

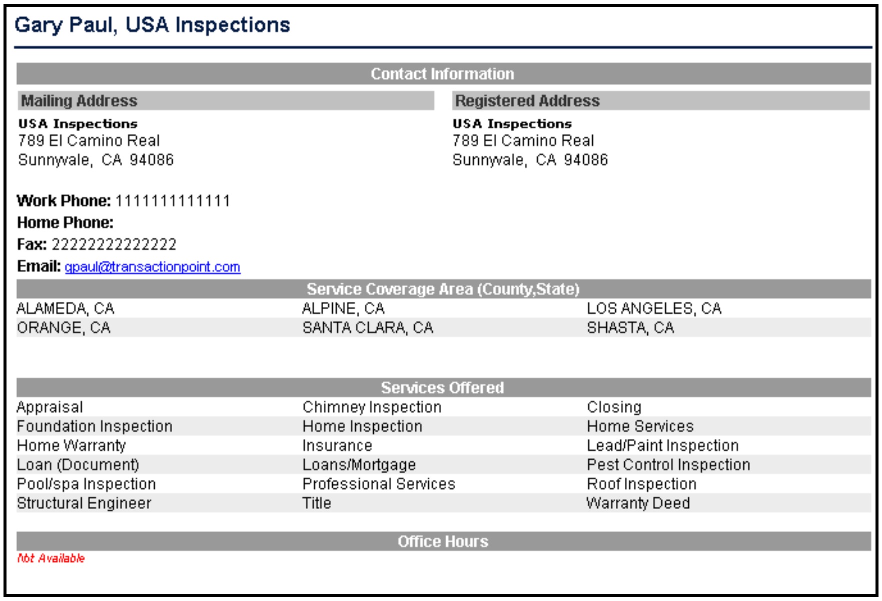
4. Select the **Search By** option.

5. Type at least two characters of the **Search text.**

6. Click **Search**. The page refreshes to show the basic provider information.



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



Gary Paul, USA Inspections

Contact Information

Mailing Address	Registered Address
USA Inspections 789 El Camino Real Sunnyvale, CA 94086	**USA Inspections** 789 El Camino Real Sunnyvale, CA 94086

Work Phone: 1111111111111
Home Phone:
Fax: 22222222222222
Email: gpaul@transactionpoint.com

Service Coverage Area (County,State)

ALAMEDA, CA	ALPINE, CA	LOS ANGELES, CA
ORANGE, CA	SANTA CLARA, CA	SHASTA, CA

Services Offered

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

Office Hours

Not Available

Document Center

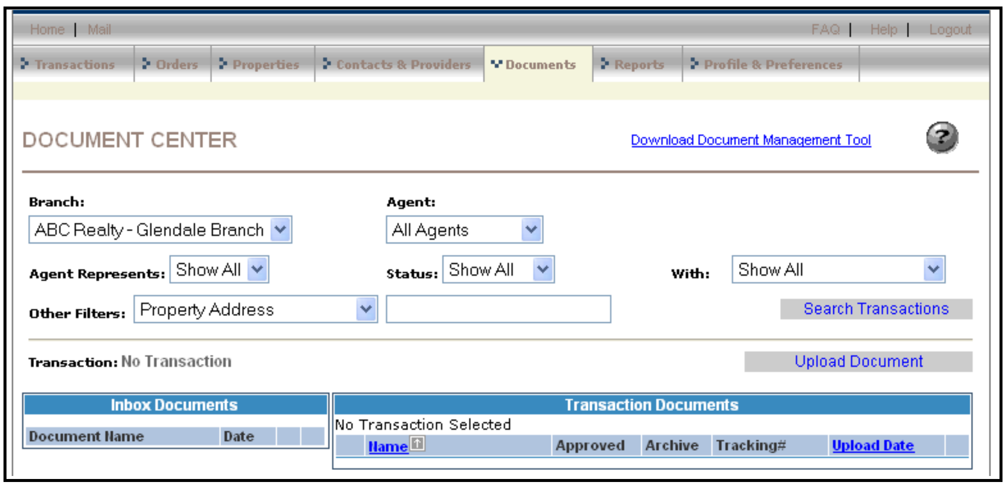
You can receive fax or e-mail documents, print documents to TransactionPoint, or upload documents located on your computer.

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.

Viewing Documents

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



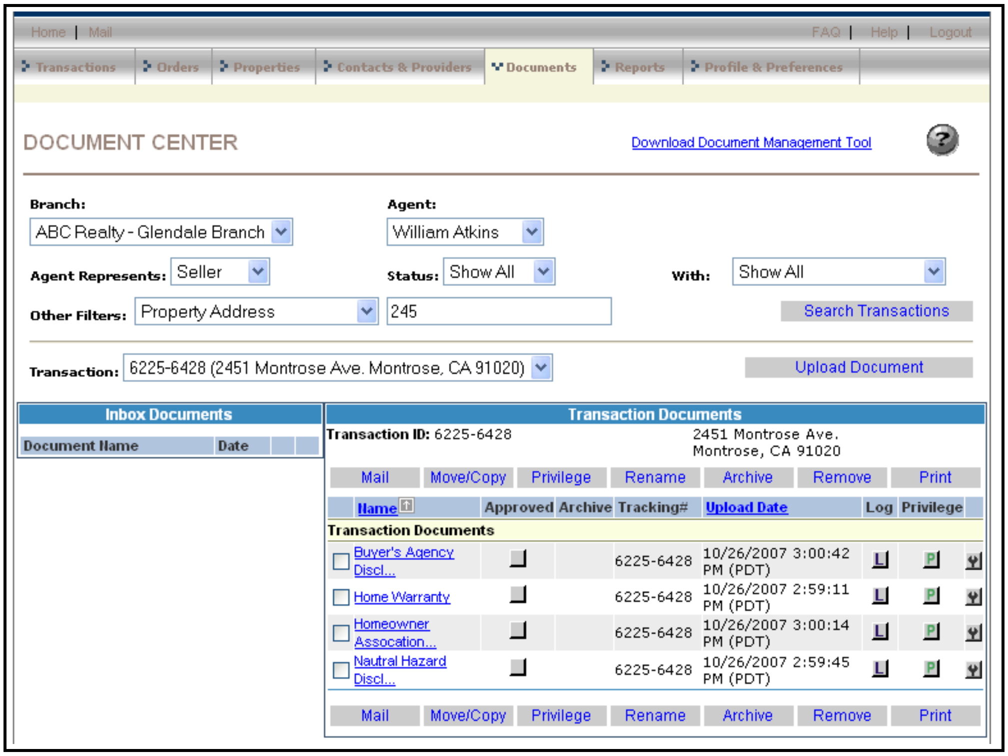
2. Select from one or more of the following lists to locate a transaction.

   - 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.



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**.

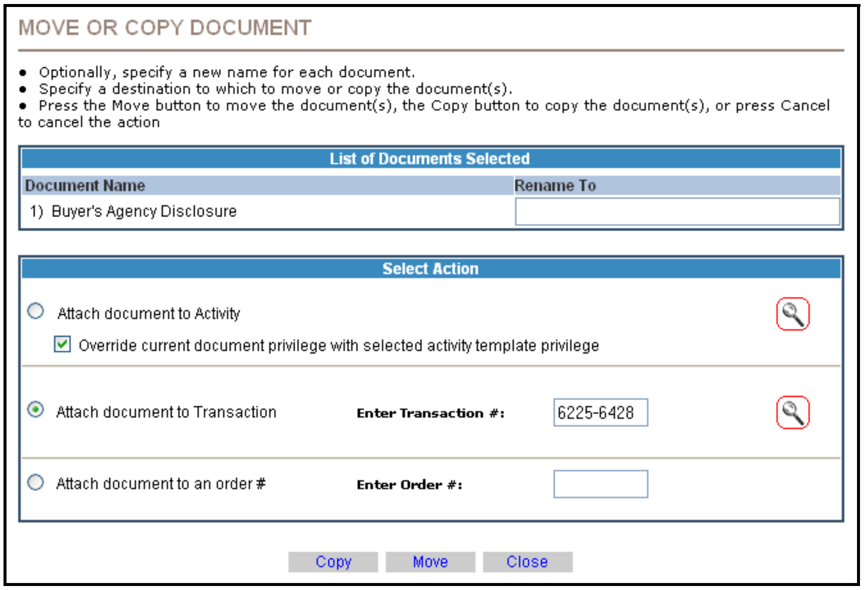
Examples A document emailed to **1023-1234@trpoint.com** is automatically uploaded to transaction **1023-1234,** regardless of who is the transaction coordinator or agent.

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.

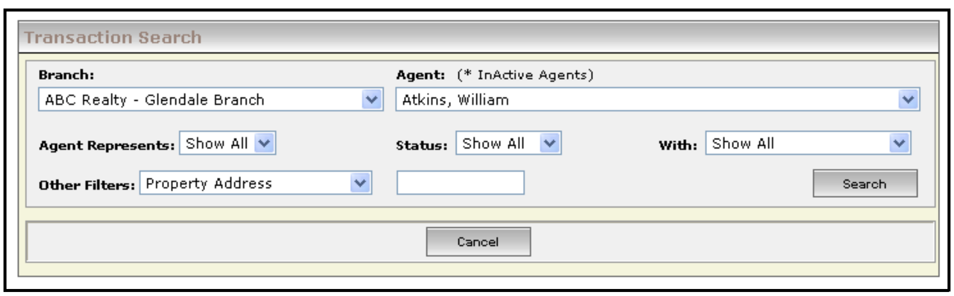
2. Click **Move** to associate the document or documents with a property, transaction, or order for this agent. The **Move or**

Copy Document page appears.



3. 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**.

4. If you select transaction or order, enter the transaction or order number or click the **Search** icon to searach for the transaction.



   a. 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)
   b. Click **Search**.
   c. 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**.

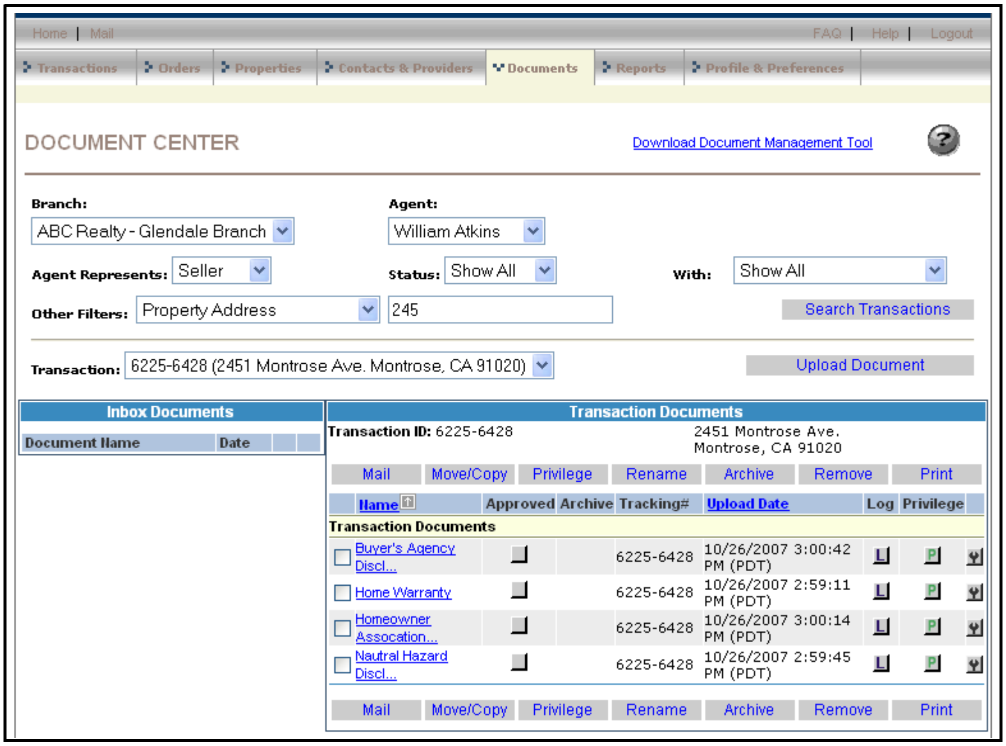
Note: You must fill in the **Transaction #** or **Order #** if you want to associate the document with a transaction or an order and click the appropriate option button. If you do not fill in the **Transaction #** or **Order #** information, the document is associated with the **Property Address** that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

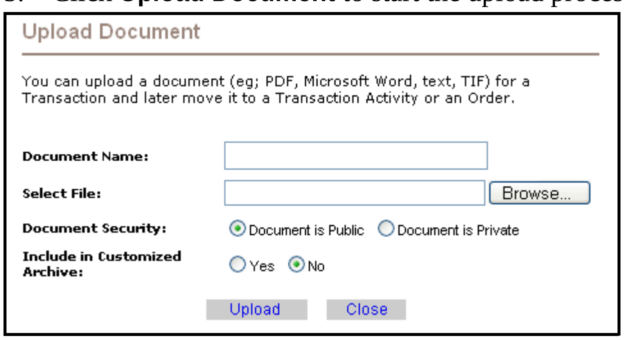
Uploading Documents

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.

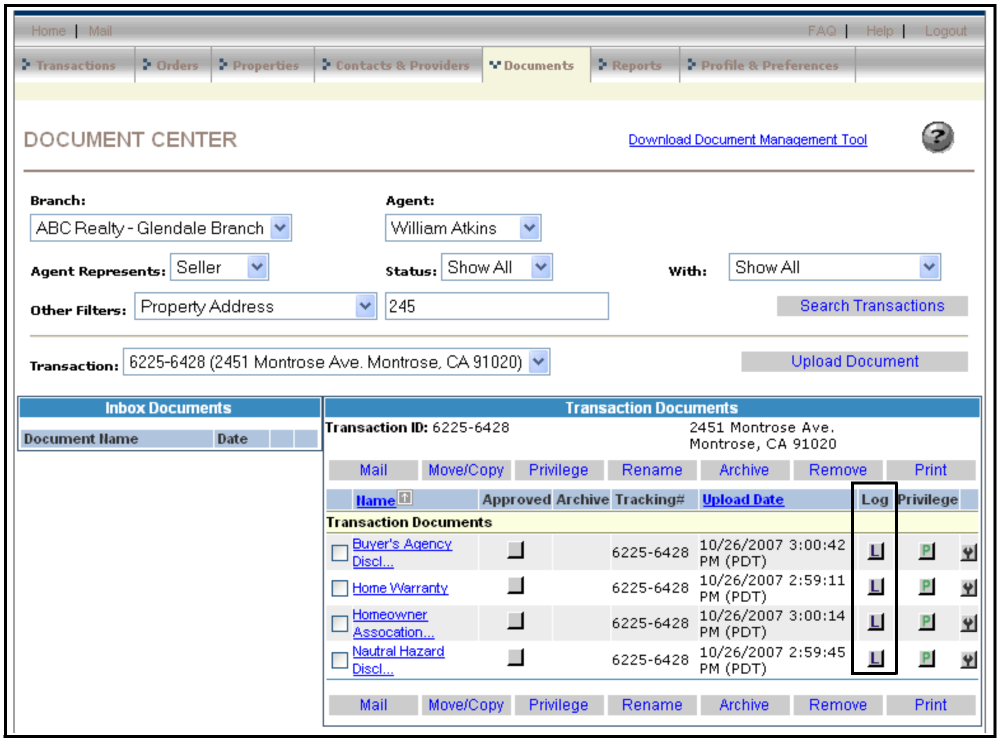
8. Select the **Document Security** option.

9. Select the **Include in Customized Archive** option.

10. Click **Upload**. The document appears in the **Transaction Documents** section.

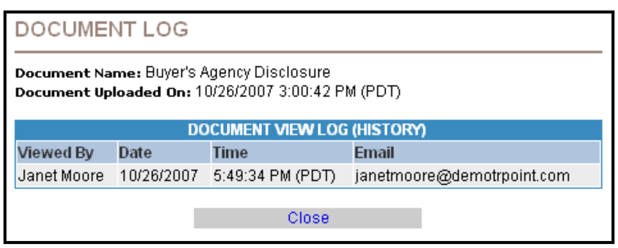
Viewing Document History

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.

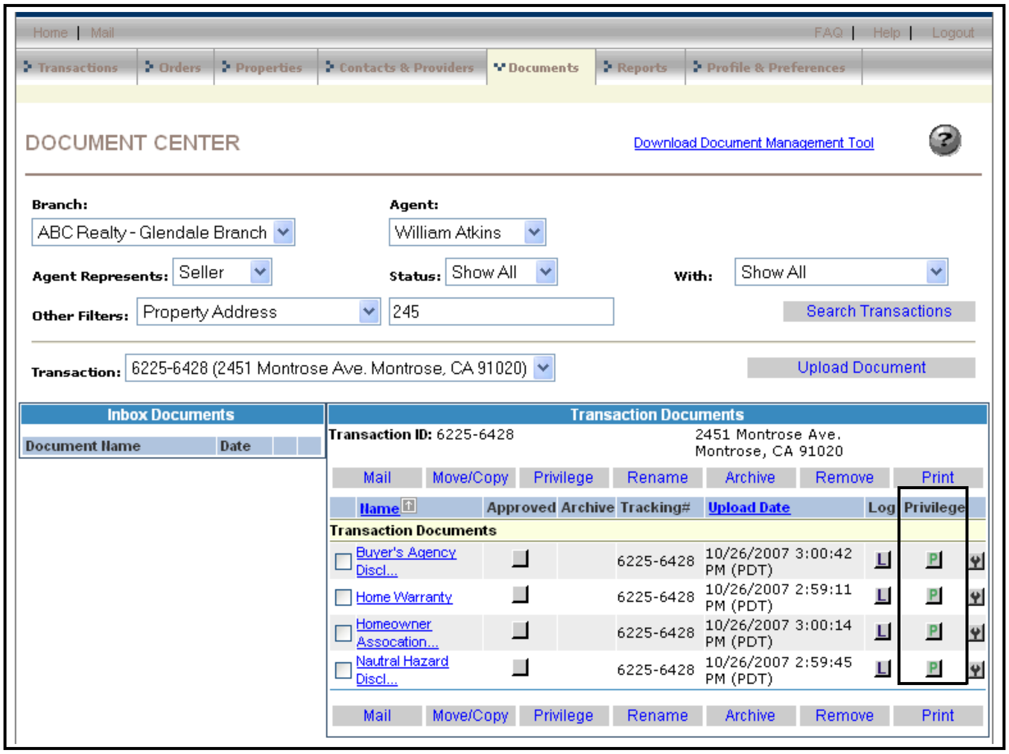


2. Click **Close** to return to the **Document Center** page.

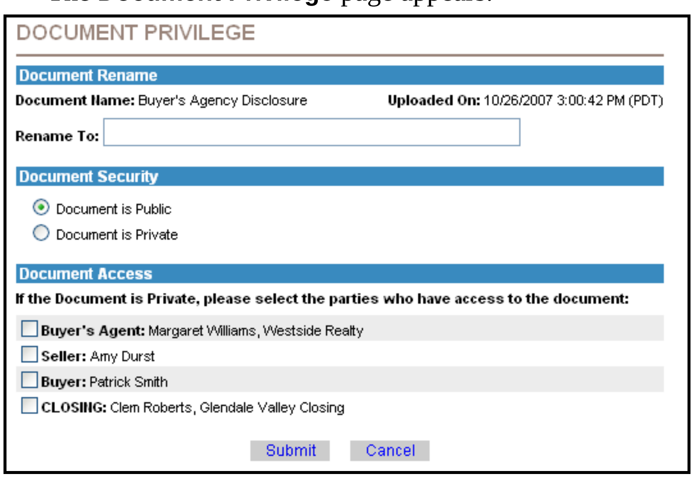
Assigning Document Access Privileges

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.



The **Document Privilege** page appears.



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.

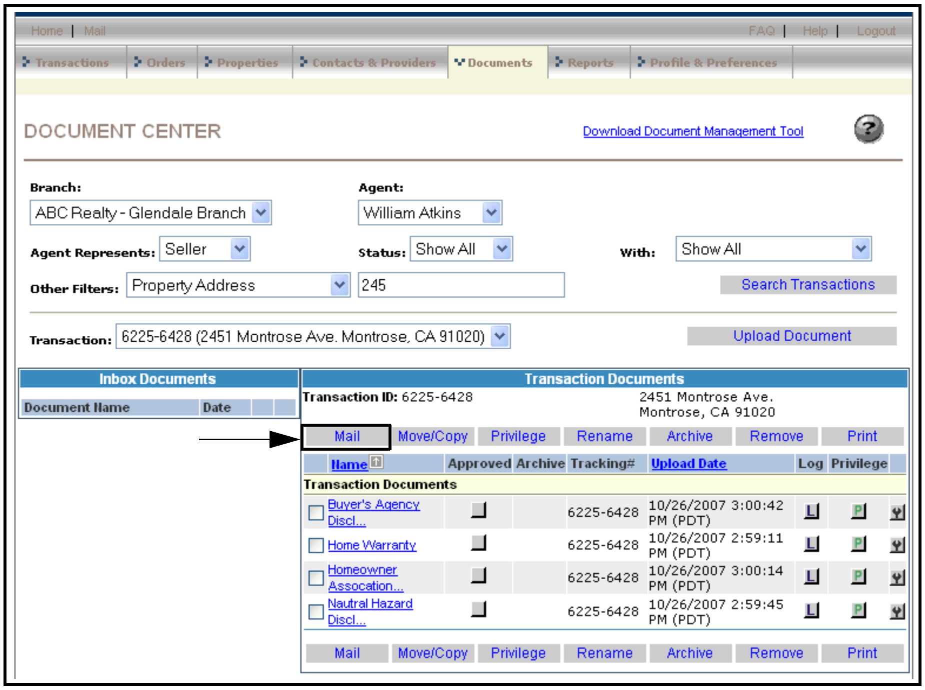
5. Click **Submit** to return to the **Document Center** page.

E-mailing a Document

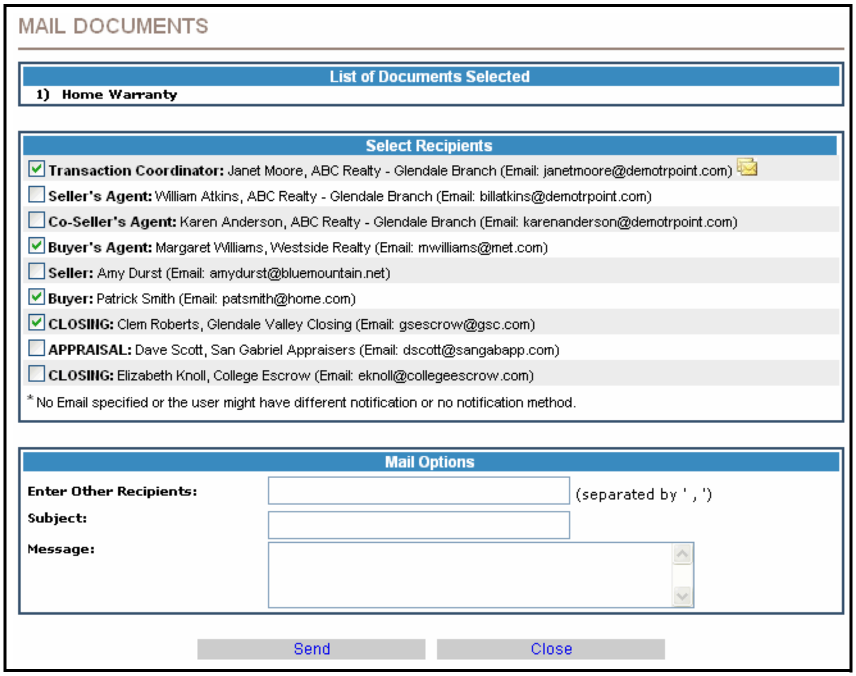
You can send a document by e-mail to any of your contacts.

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

2. Click **Mail**.



The **Mail Document** page appears.



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.

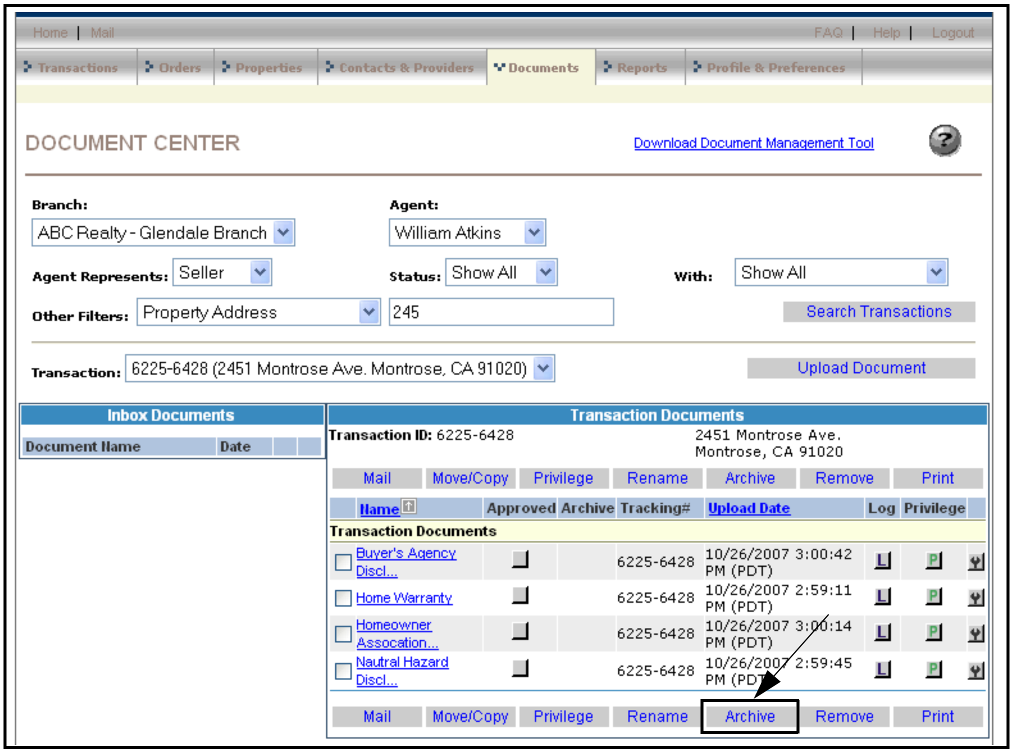
---

4. Add more receipients by entering additional e-mail addresses in the **Enter Other Recipients** field. Separate addresses with a comma.

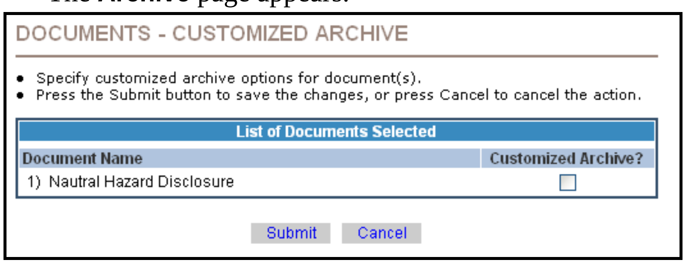
5. Enter a **Subject** and a **Message**, then click **Send**.

Archiving Transaction Documents

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



The **Archive** page appears.

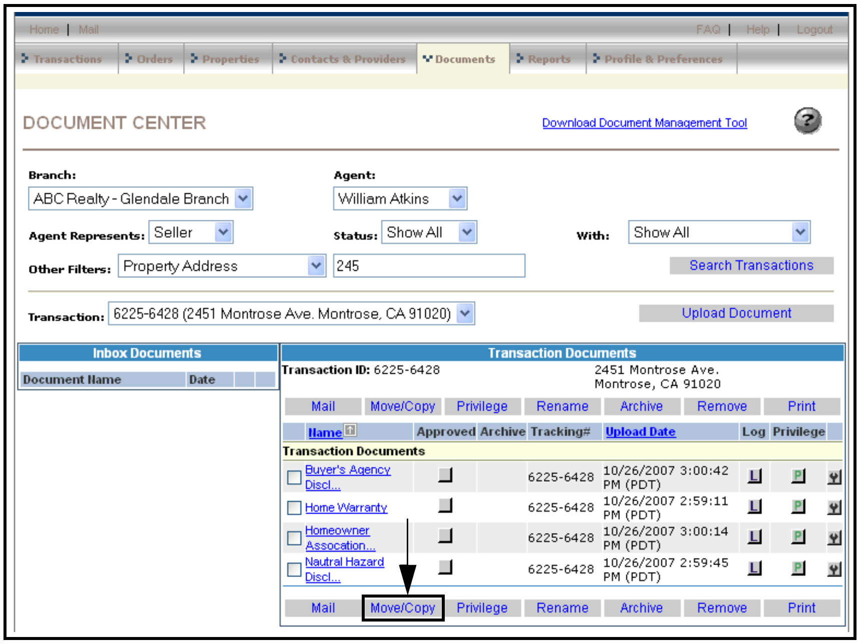


2. Click **Submit**.

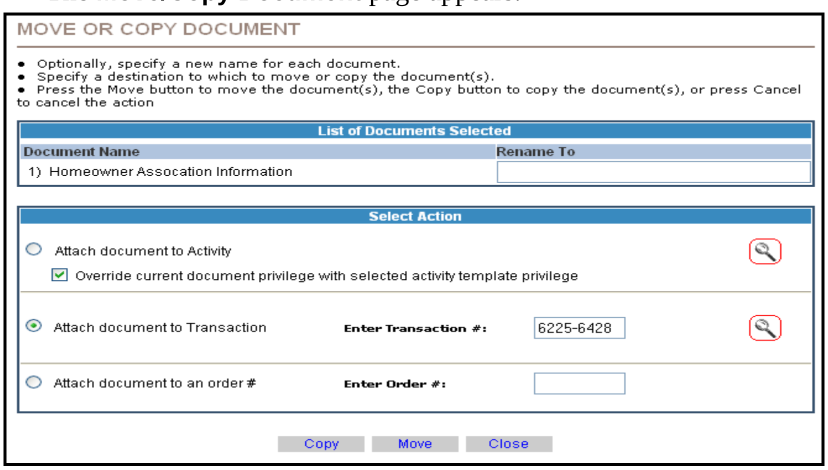
Moving and Copying Transaction Documents

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 **Move/Copy Document** page appears.

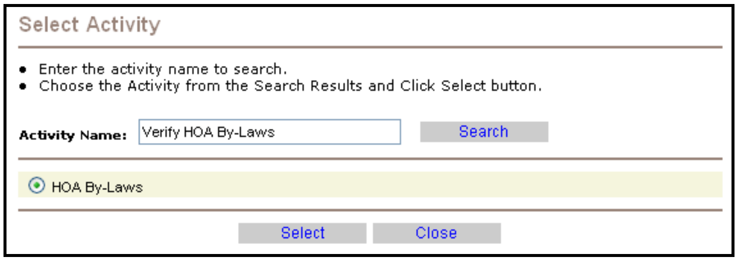


2. Rename the document, if necessary.

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 **Activty 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.

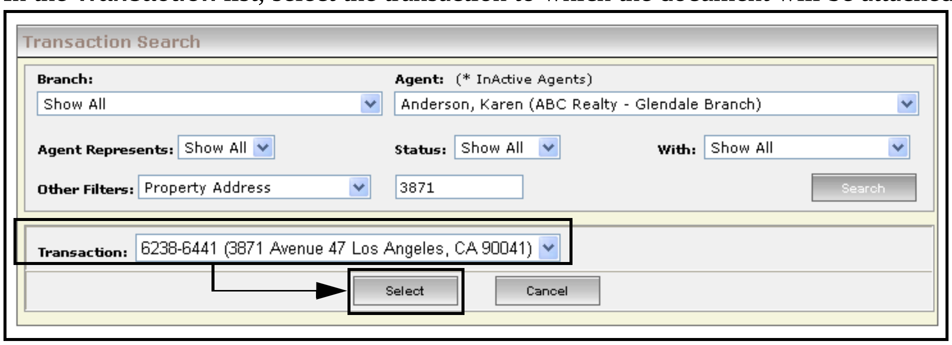
- Attach document to transaction - click the **Search** icon to locate a transaction.

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

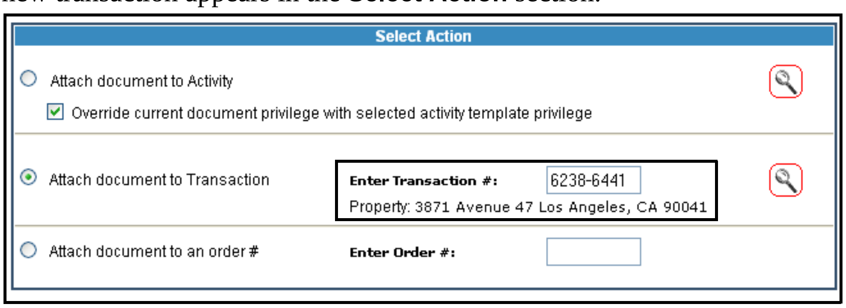
ii. In the **Other Filters** list select an option and enter additional information in the adjacent text box.

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.

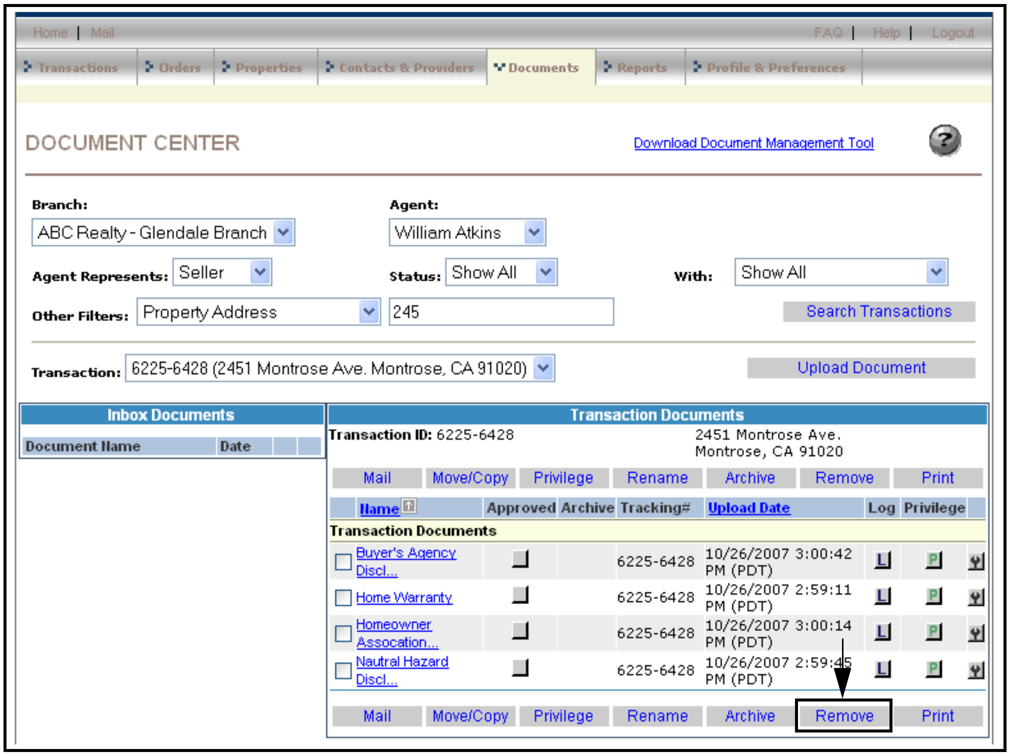
Note: The page refreshes and shows that the document is no longer associated with the transaction. There is no visual indicator as to where you moved the document. You need to note the address to where you moved the document.

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

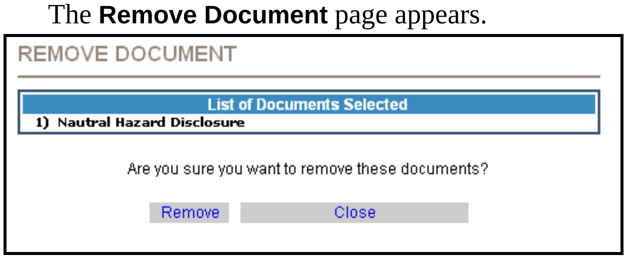
Removing a Document

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 **Remove Document** page appears.



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

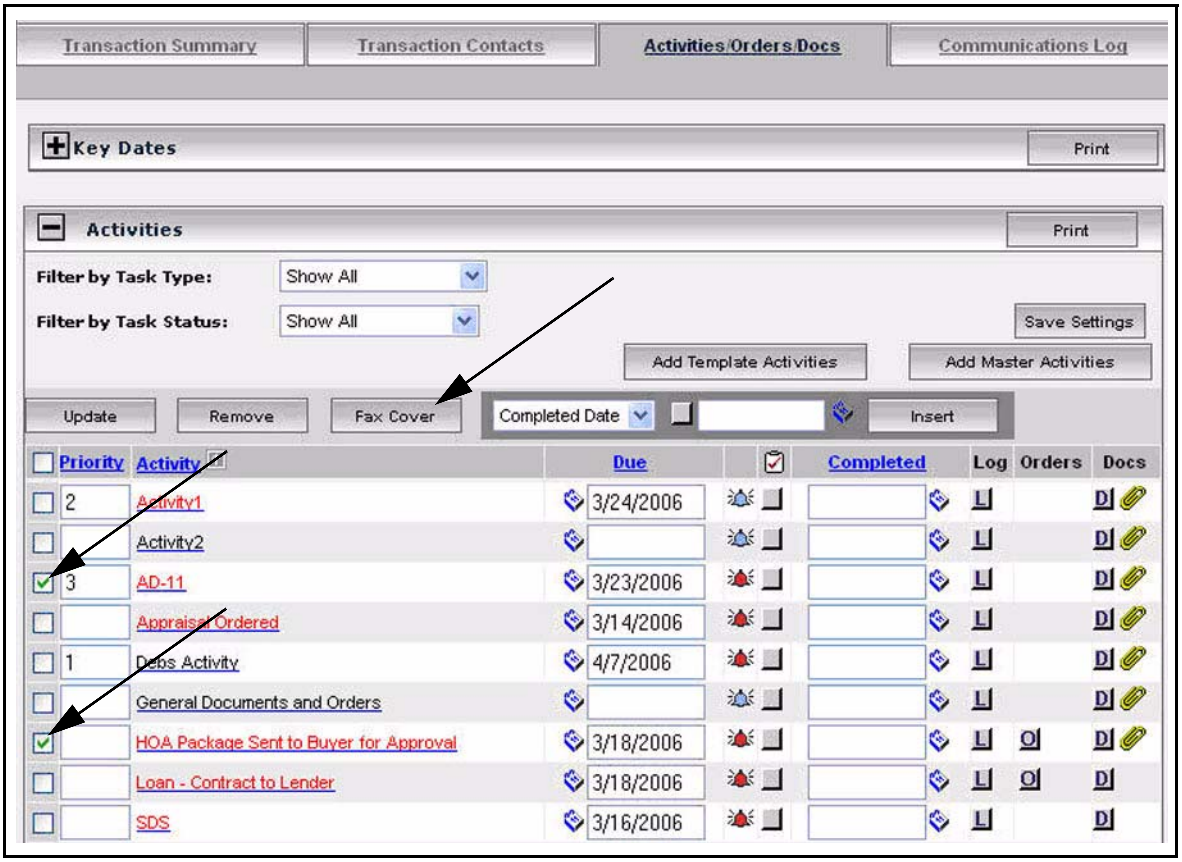
Using Document / Activity Defaults

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

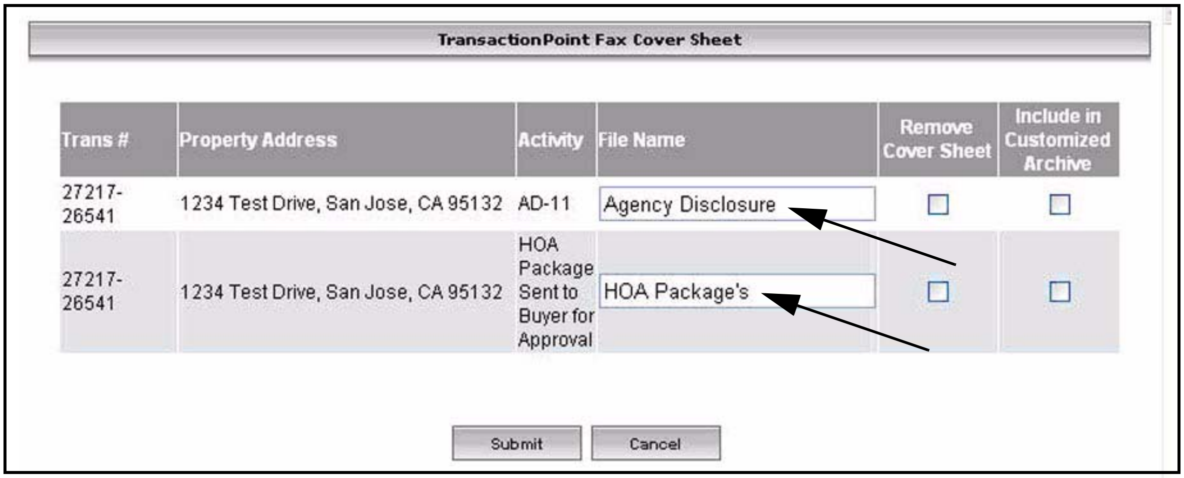
1. Click the **Activities/Orders/Docs** tab within the transaction.



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.



4. If applicable, check **Remove Cover Sheet**.

5. If applicable, check **Include in Customize Archive**.

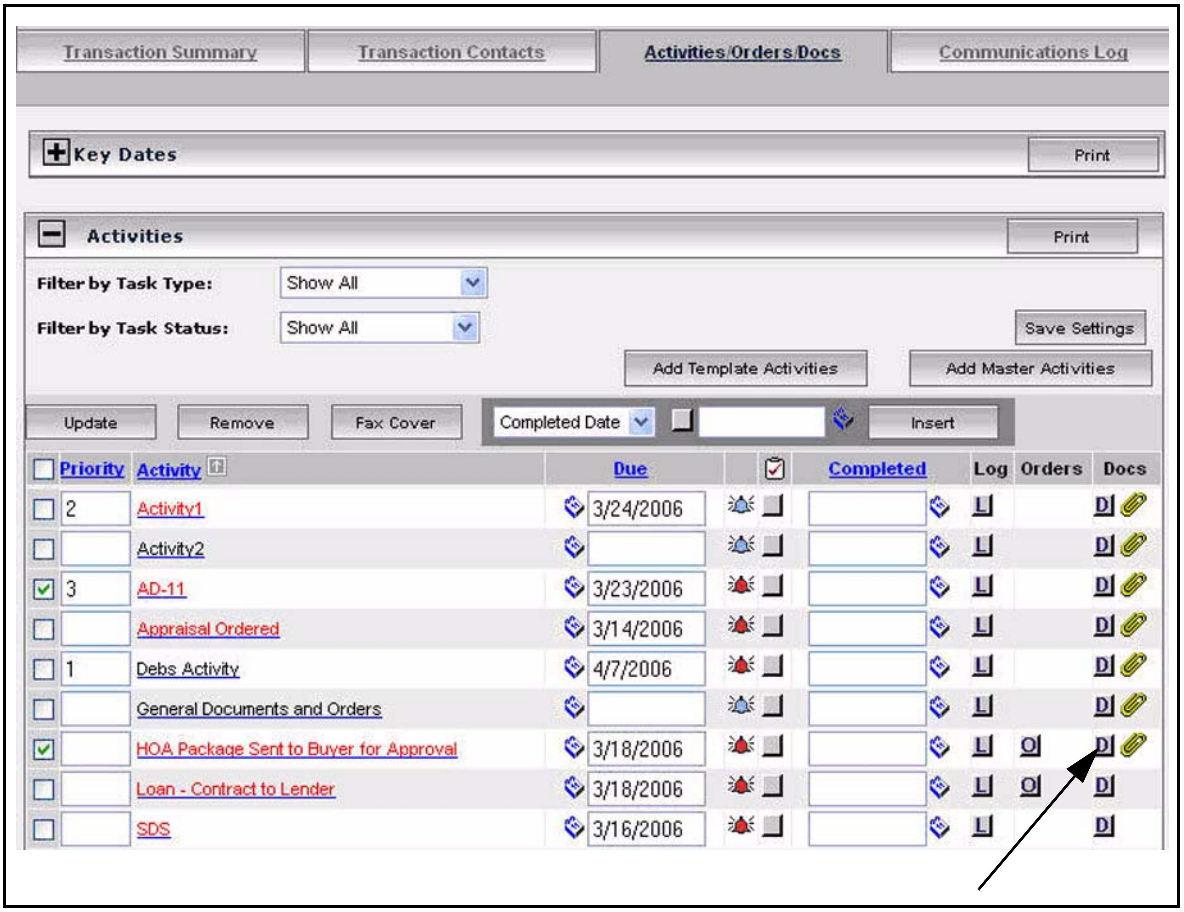
6. Click **Submit**.

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.

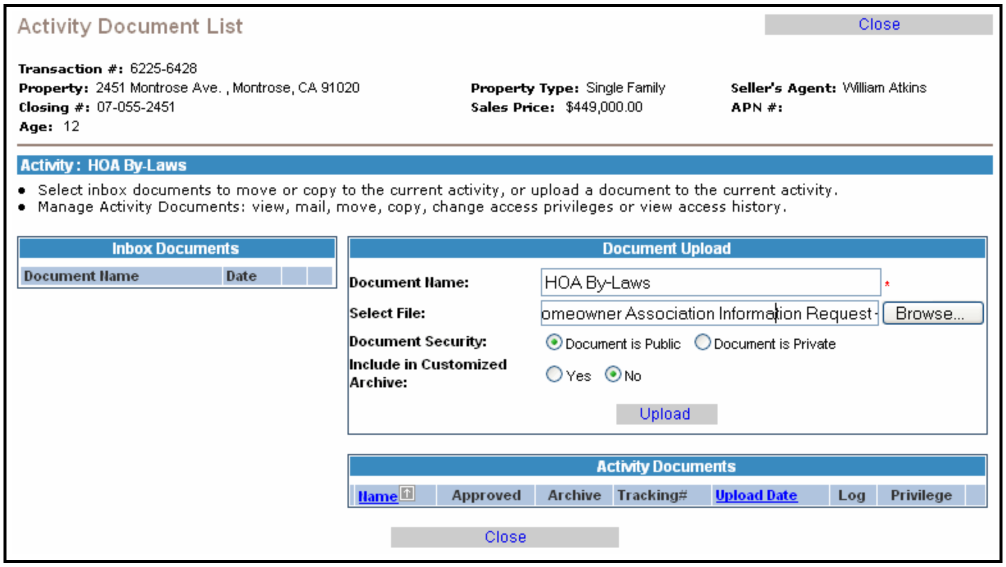
---

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

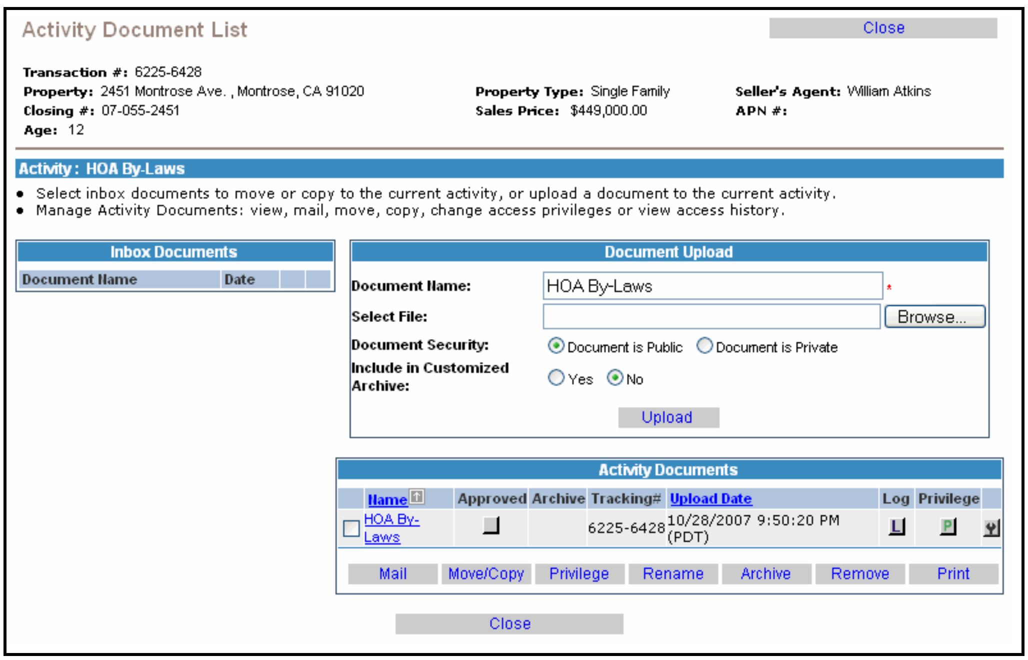


2. Click the **D** icon associated with the activity to which you want to upload a document.

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



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



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

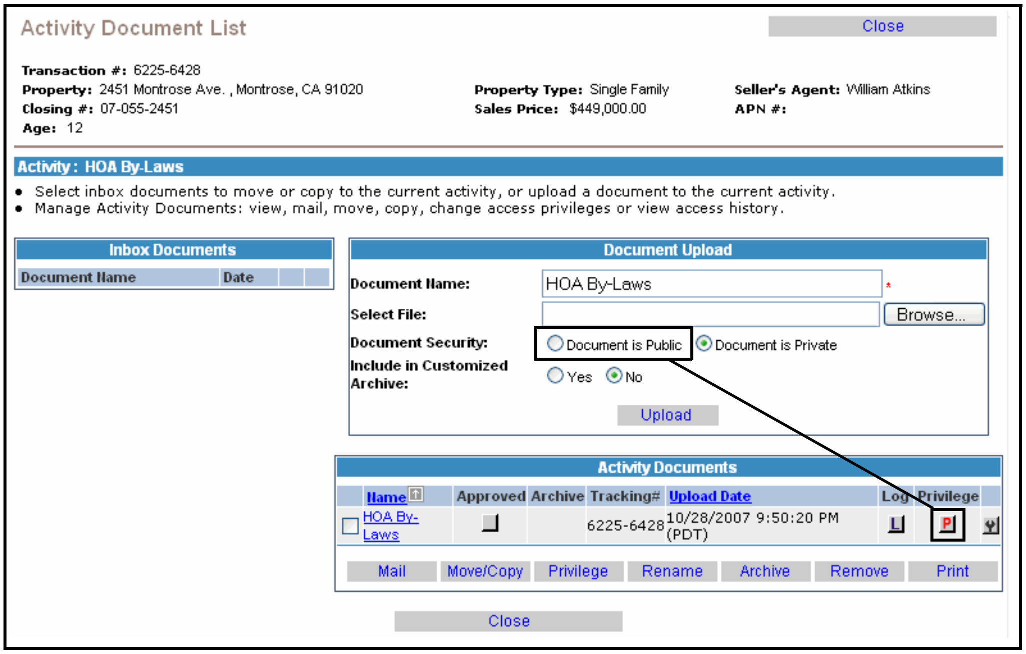
Using Default Document Privileges

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.



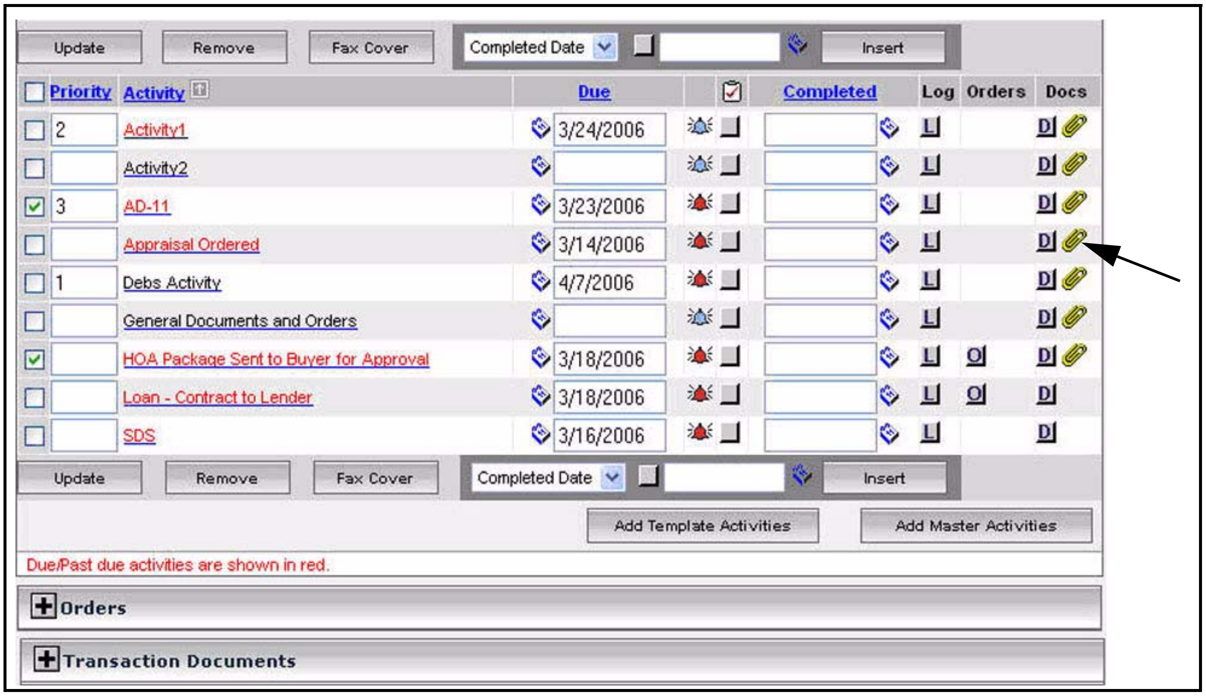
The Site Administrator may set the document privilege to **Private** and give viewing access to the following people:

- 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.

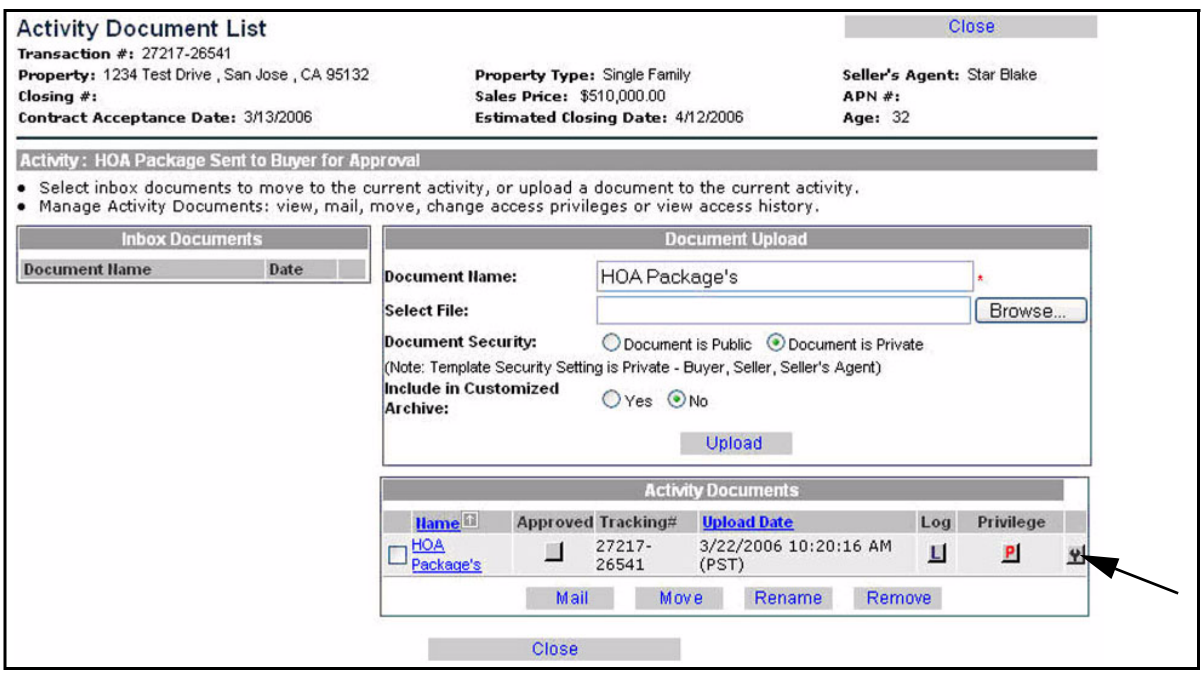
Splitting a Document into Multiple Documents

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



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

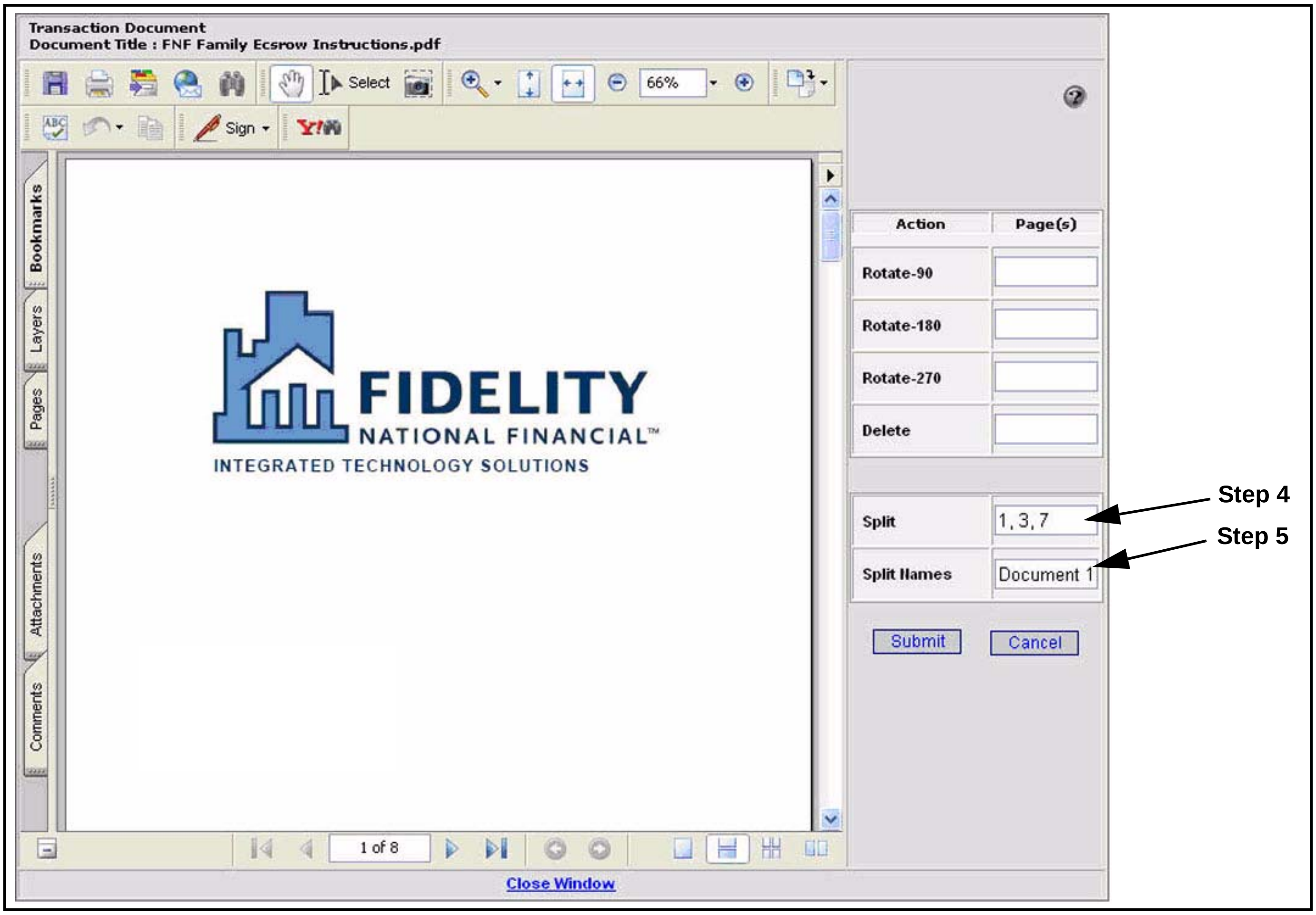
2. Click the paper clip next to the activity document you want to split. The Activity Document List appears.



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**.

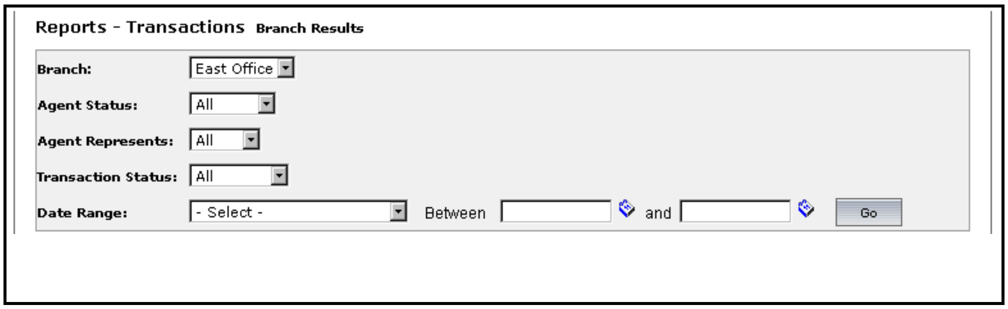
Note: You may also access the PDF splitting tool in the Transaction Documents section. See *Including a Document Using the Upload Feature* on page 48.

Report Center

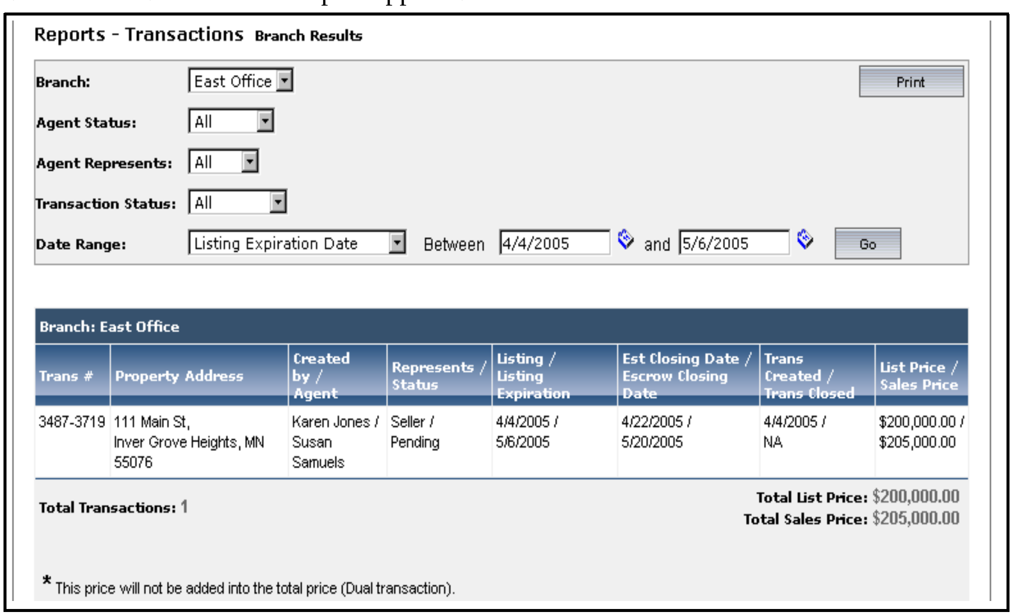
You can create Branch, Agent, Activity and Documents Received reports.

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.

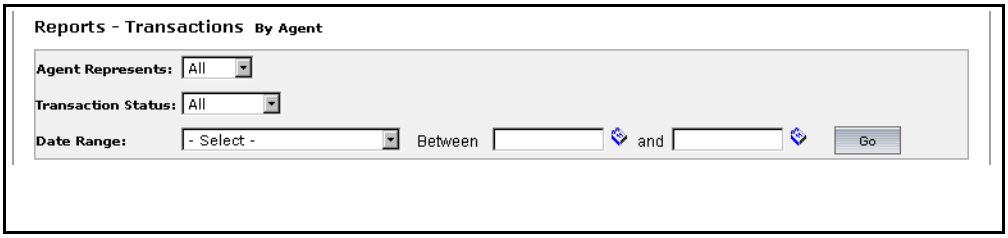


Use the **Print** button to print the report.

Creating an Agent Report

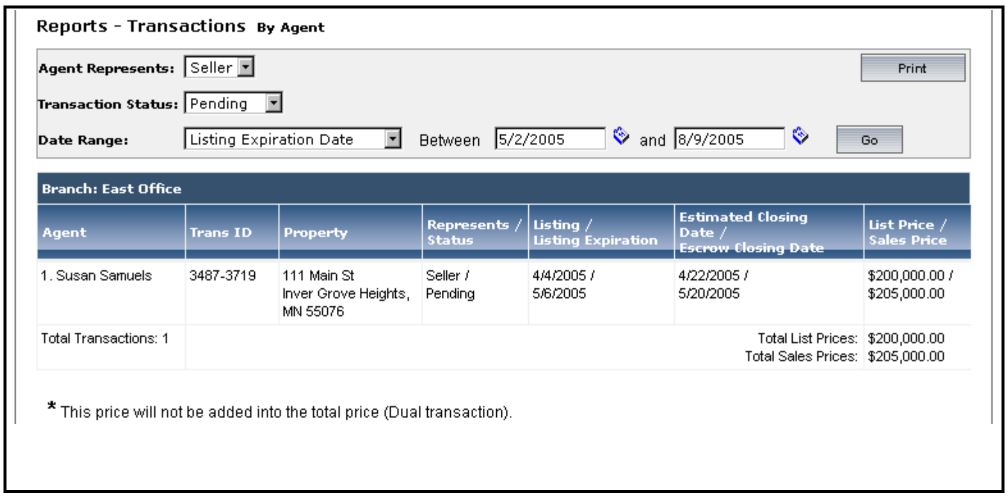
1. Click the **Reports** tab.

2. Click **Agent Results.**



3. Select the **Agent Representation, Transaction Status**, and/or **Date Range**.

4. Click **Go**. The Agent report appears.

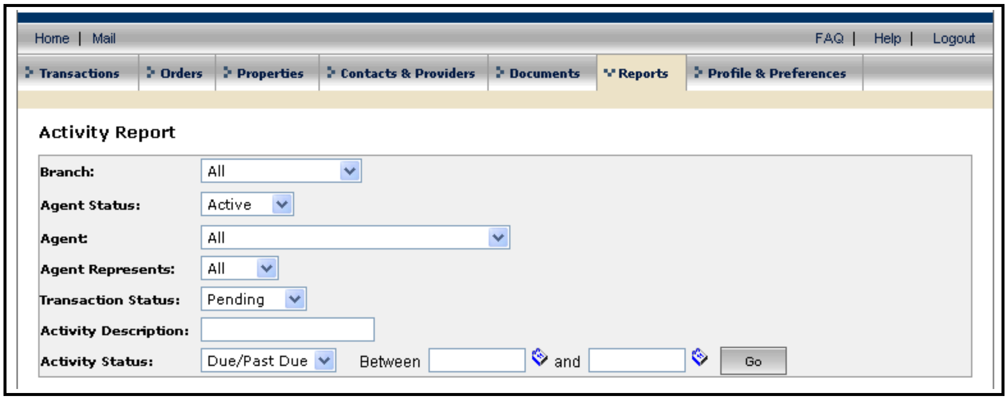


Use the **Print** button to print the report.

Creating an Activity Report

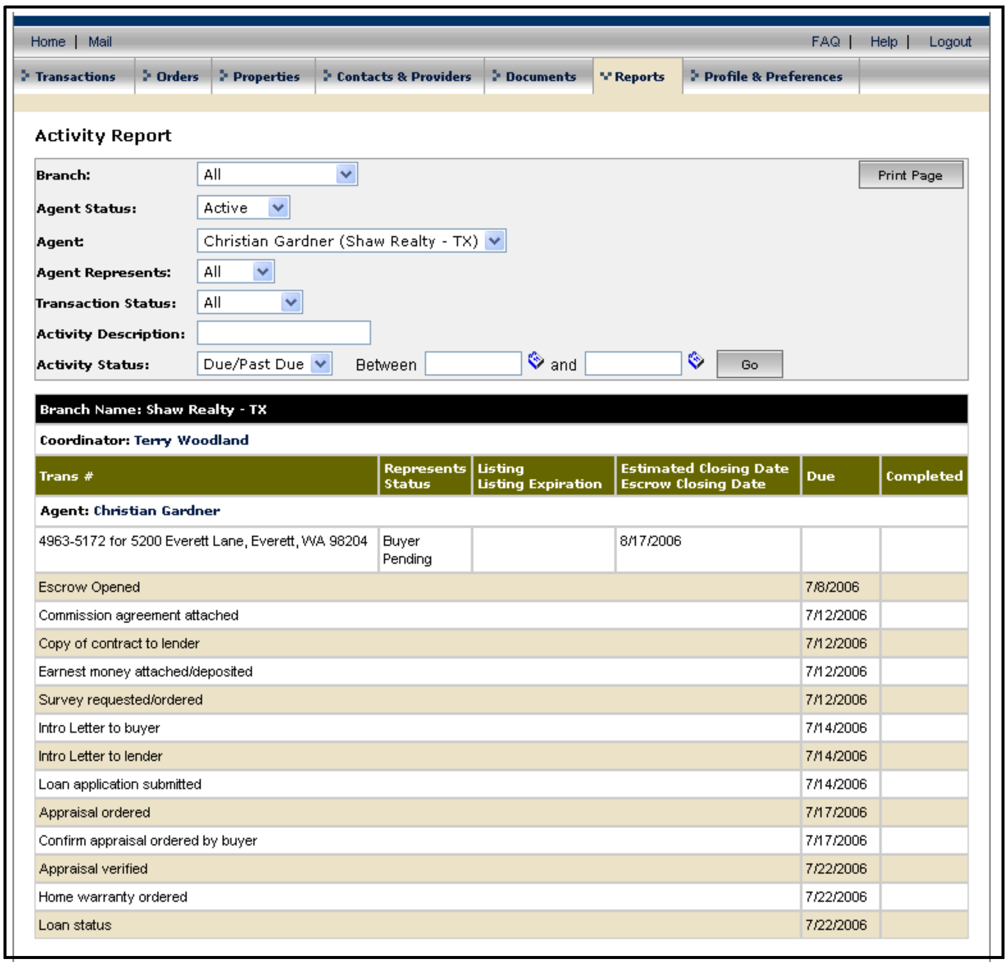
1. Click the **Reports** tab.

2. Click **Activity Report**.



3. Select the **Branch**, **Agent Status**, **Agent Representation**, **Transaction Status**, and/or **Date Range**.

4. Click **Go**. The Activity report appears.



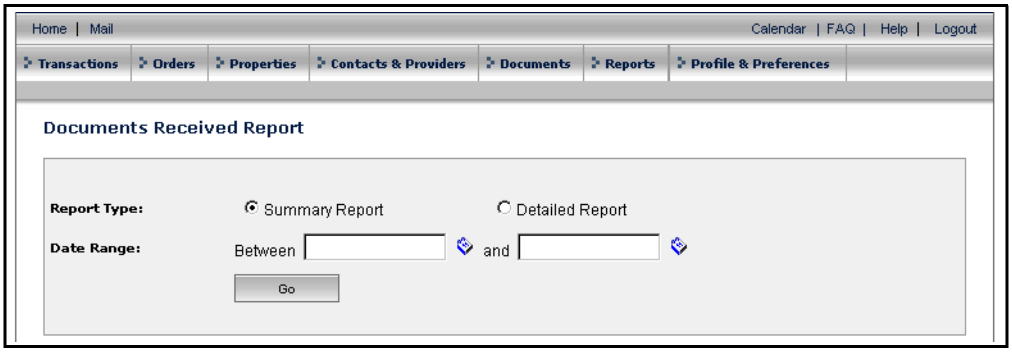
Branch Name: Shaw Realty - TX					
Coordinator: Terry Woodland					
Trans #	Represents Status	Listing Listing Expiration	Estimated Closing Date Escrow Closing Date	Due	Completed
Agent: Christian Gardner					
4963-5172 for 5200 Everett Lane, Everett, WA 98204	Buyer Pending		8/17/2006		
Escrow Opened				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.

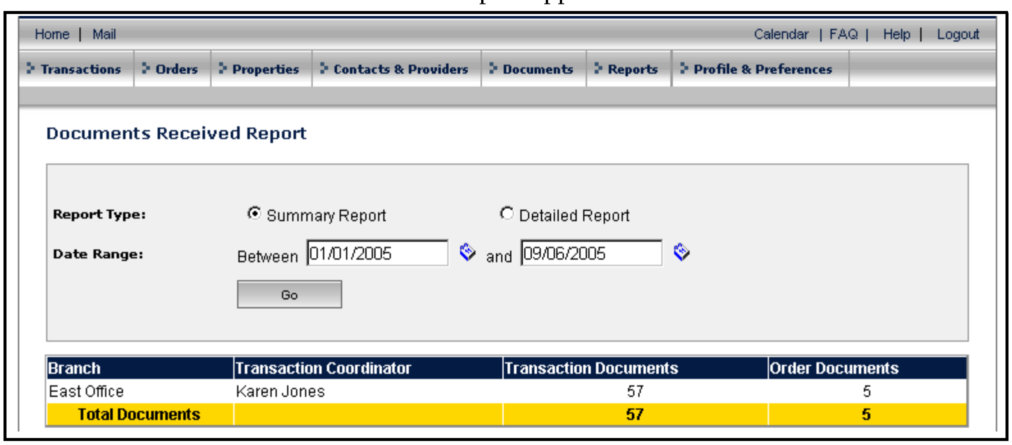
2. Click **Documents Received Report**.



3. Select the **Report Type** (Summary or Detailed).

4. Enter the **Date Range**.

5. Click **Go**. The Documents Received report appears.



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

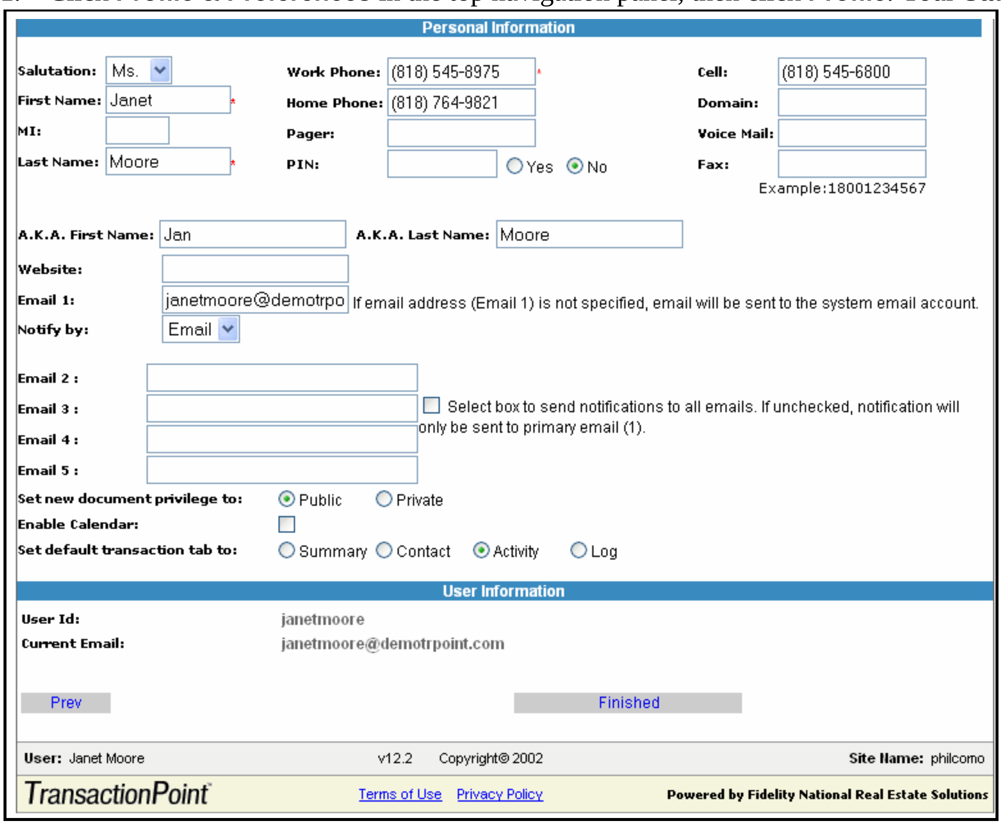
Profiles & Preferences

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.



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.

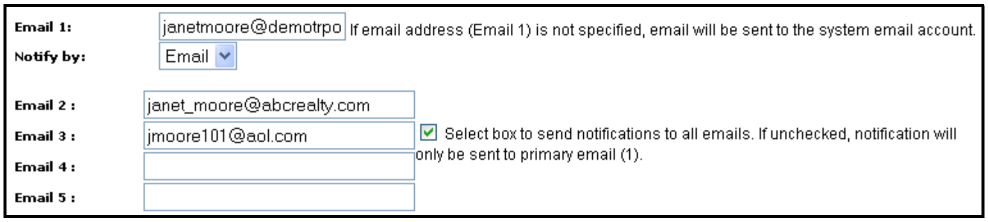
Addding Additional E-Mail Addresses

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.



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.

Additional Information About E-Mail Messages

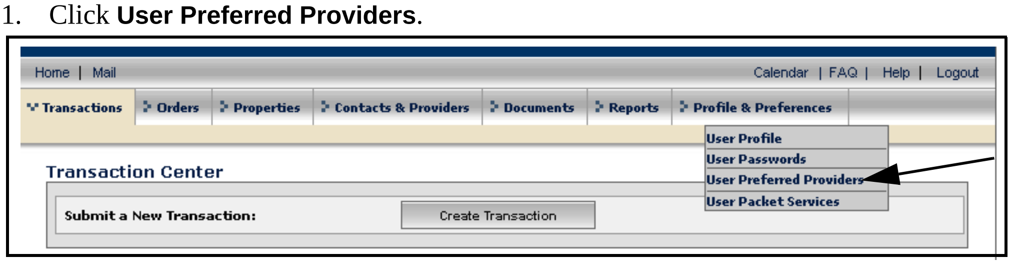
Note the following parameters for e-mail addresses:

- 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

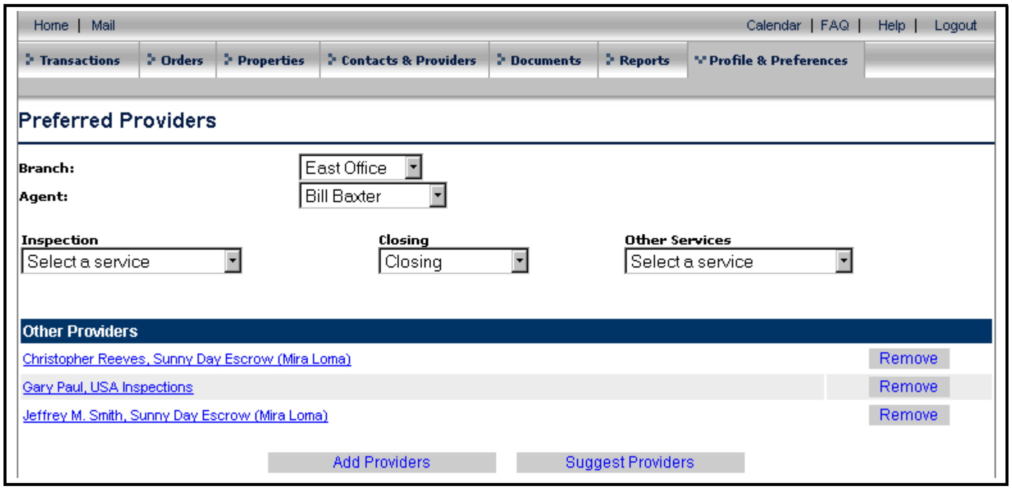
1. Click **User Preferred Providers**.



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.



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.

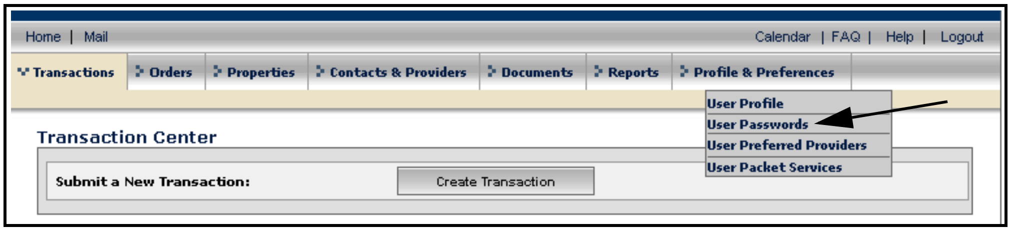
7. After you obtain all needed provider information, click **Finished**.

Changing Your Password

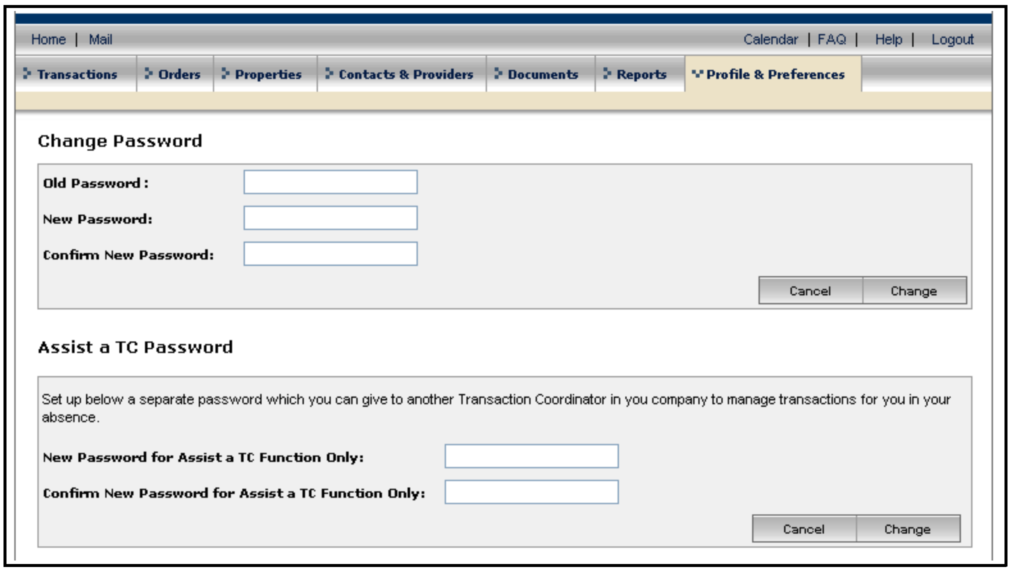
Use the **Password** feature to change your login password.

1. Click the **Profile & Preferences** tab.

2. Click **User Passwords**.



The **Change Password** page appears.

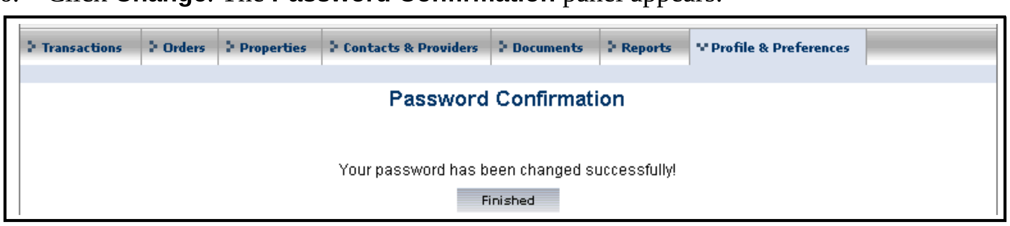


3. Type your **Old Password**.

4. Type your **New Password**.

5. Retype your new password in the **Confirm New Password** field.

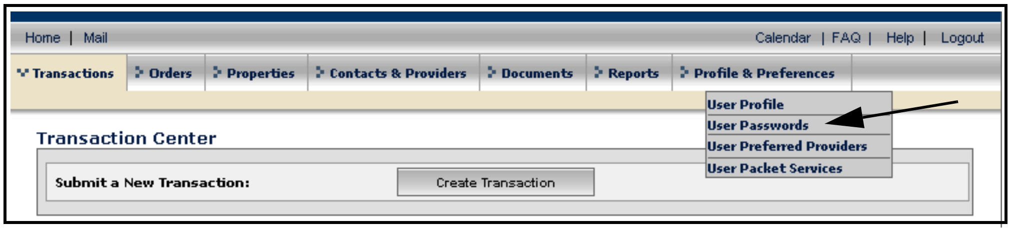
6. Click **Change**. The **Password Confirmation** panel appears.



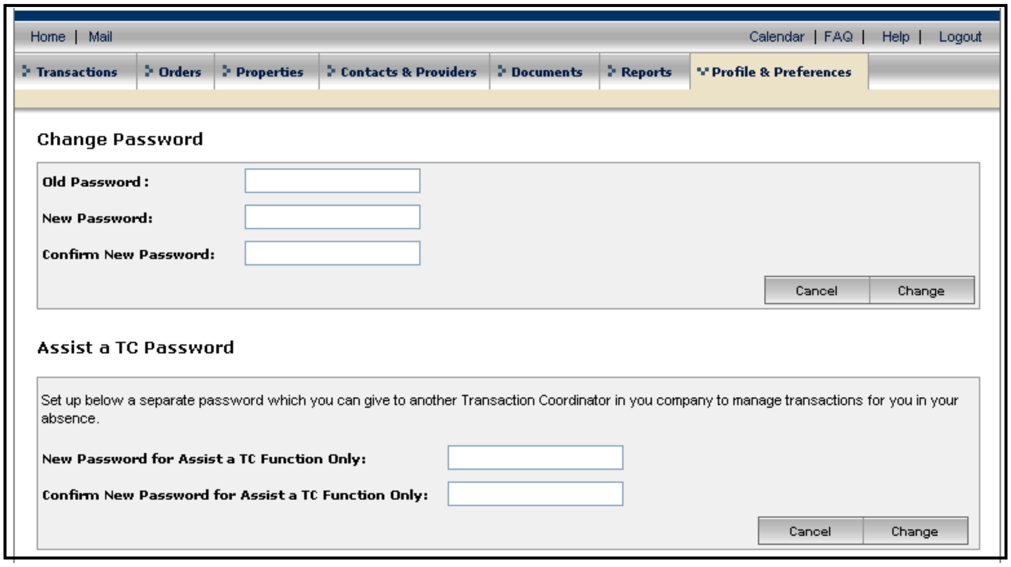
7. Click **Finished**.

Setting Up an Assistant Password

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



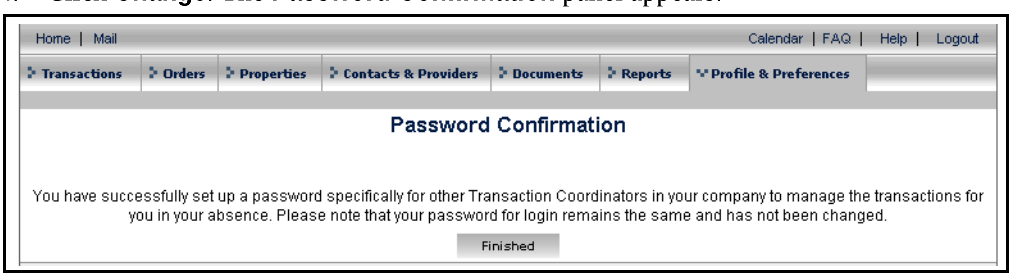
The **Change Password** page appears.



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.



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.

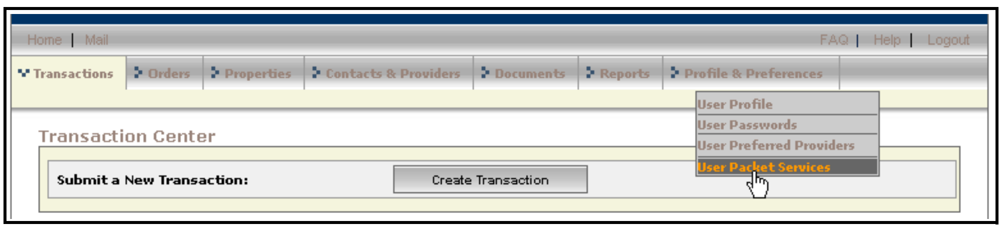
Setting Up My Packet Services

These sections describe how to:

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

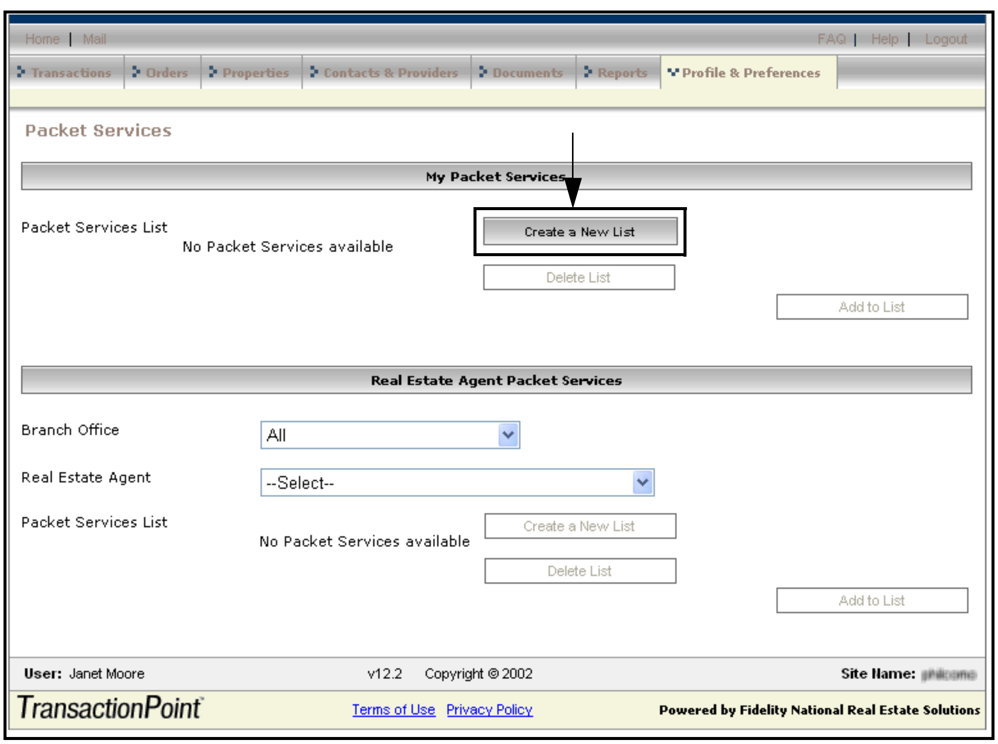
Creating a New List

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

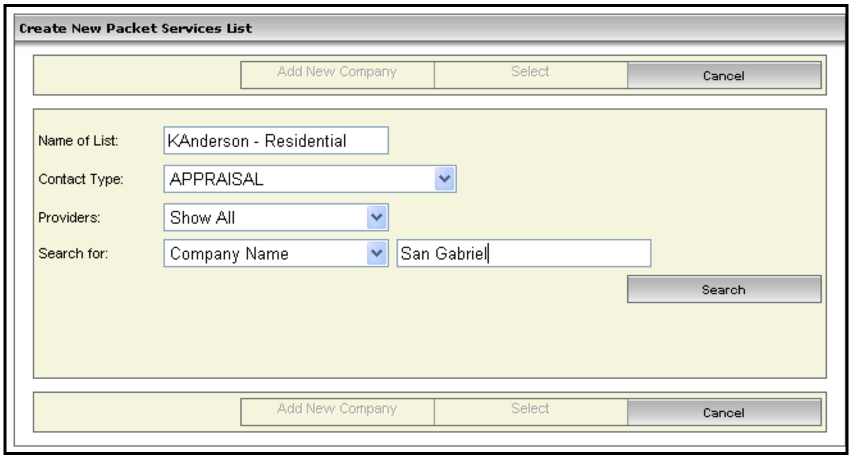


The **Packet Services** page appears.

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



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

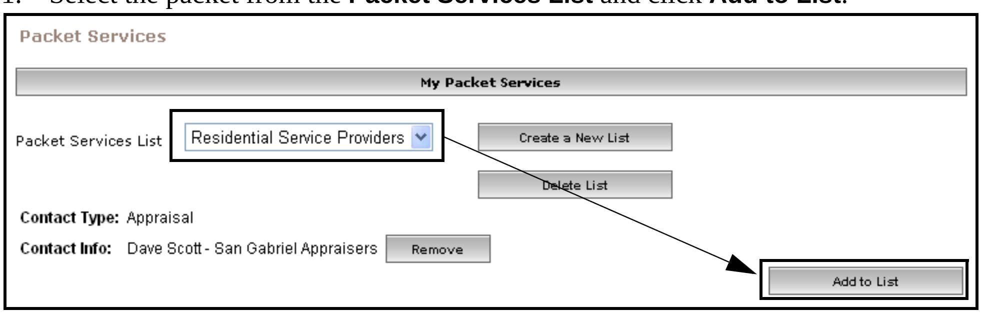


3. In the **Name of List** text box, enter a name. This is the packet services name to look for when adding the packet to your transaction.

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

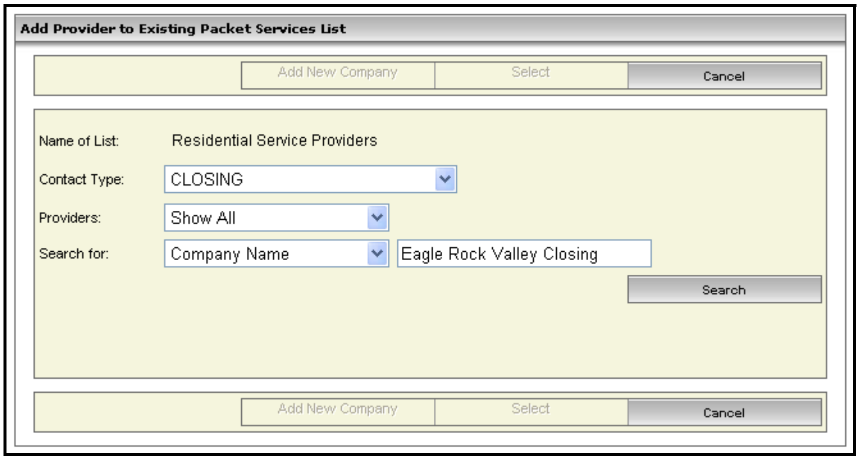
1. Select the packet from the **Packet Services List** and click **Add to List**.



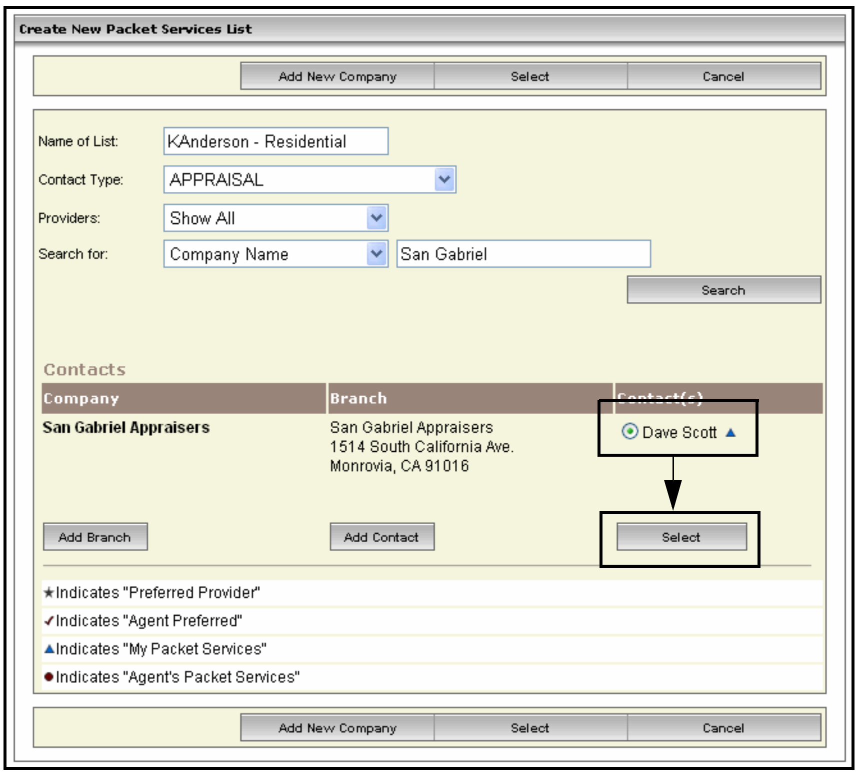
2. In the window for adding a provider, enter your search criteria:

- 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.



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**.



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.

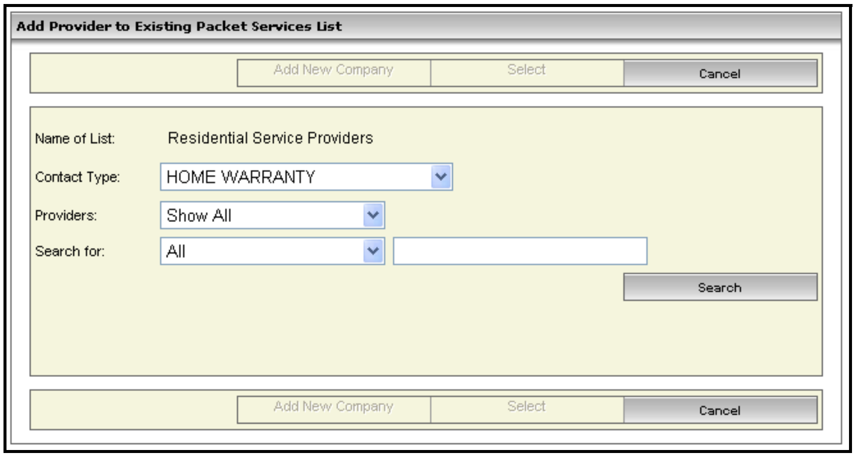
Adding Multiple Providers for a Service Category

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

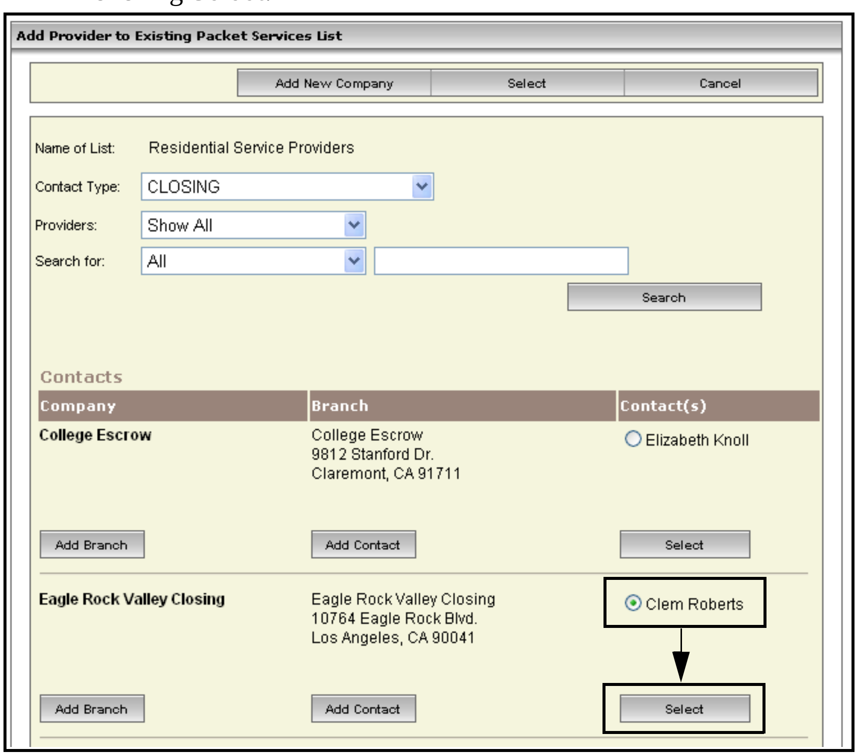
1. Select a packet from the **Packet Services List** and click **Add to List**.

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.

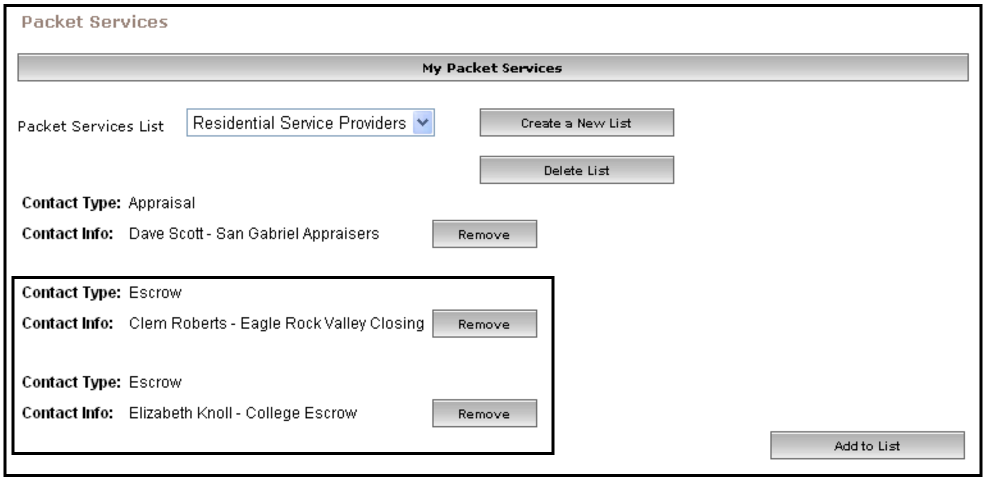


- Click **Search**. From the list of providers displayed, choose a contact by selecting the option button for that name, then click Select. If only one contact appears, you still need to select the option button for that contact before clicking **Select**.



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

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



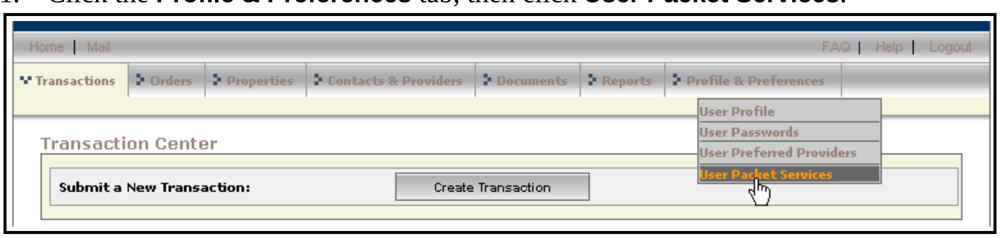
Setting Up Real Estate Agent Packet Services

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

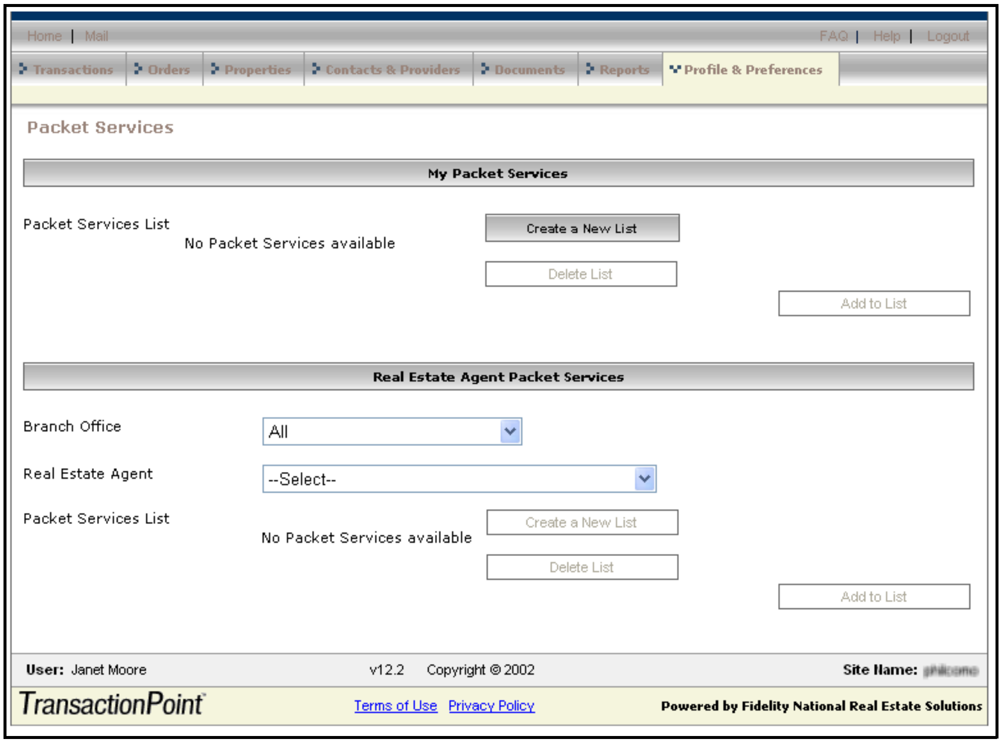
- Create a new list.
- Add a single provider from a service category.
- Add multiple providers from a service category.

Creating a New List

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



The **Packet Services** page appears.



1. In the Real Estate Agent Packet Services section:

   a. Select the branch office from the **Branch Office** list.

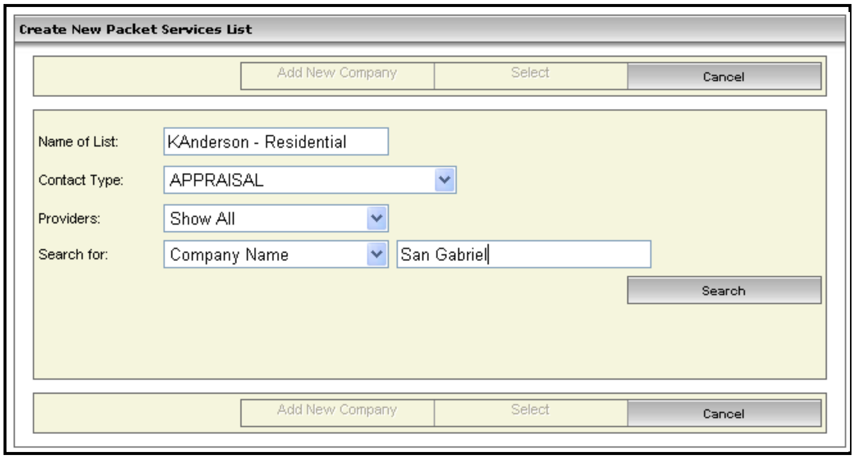
      - If your access is a single branch only, that branch automatically appears in the Branch Office list.
      - If your access is to multiple branches, **All** appears in the Branch Office list. You can leave this selection unchanged or select a specific branch.

   b. 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**.

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



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.

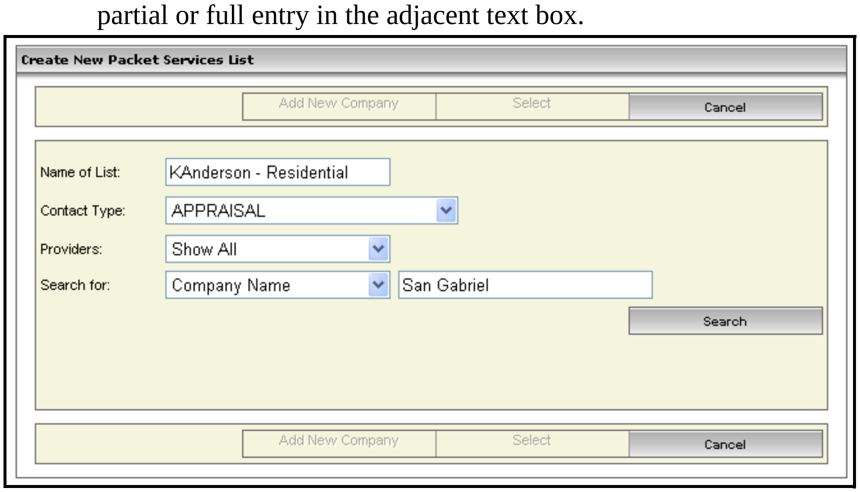
Note: When you create a new list for an agent you must also add the first service provider. To add a service provider see the section Adding a Single Provider for a Service Category. Begin with step 2.

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**.

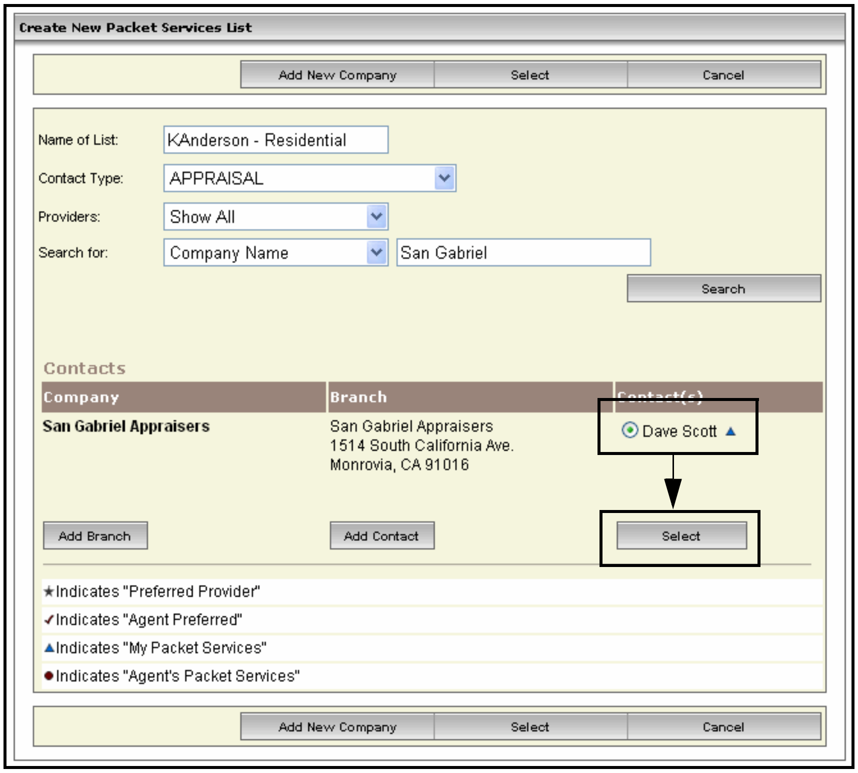
2. In the window for adding a provider, enter your search criteria:

   - 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.



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.



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

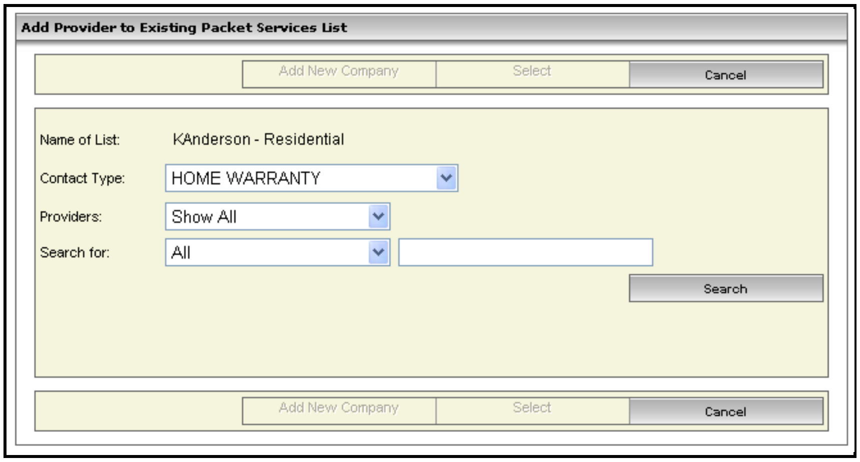
Note that these steps assume that a packet services list has already been created.

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

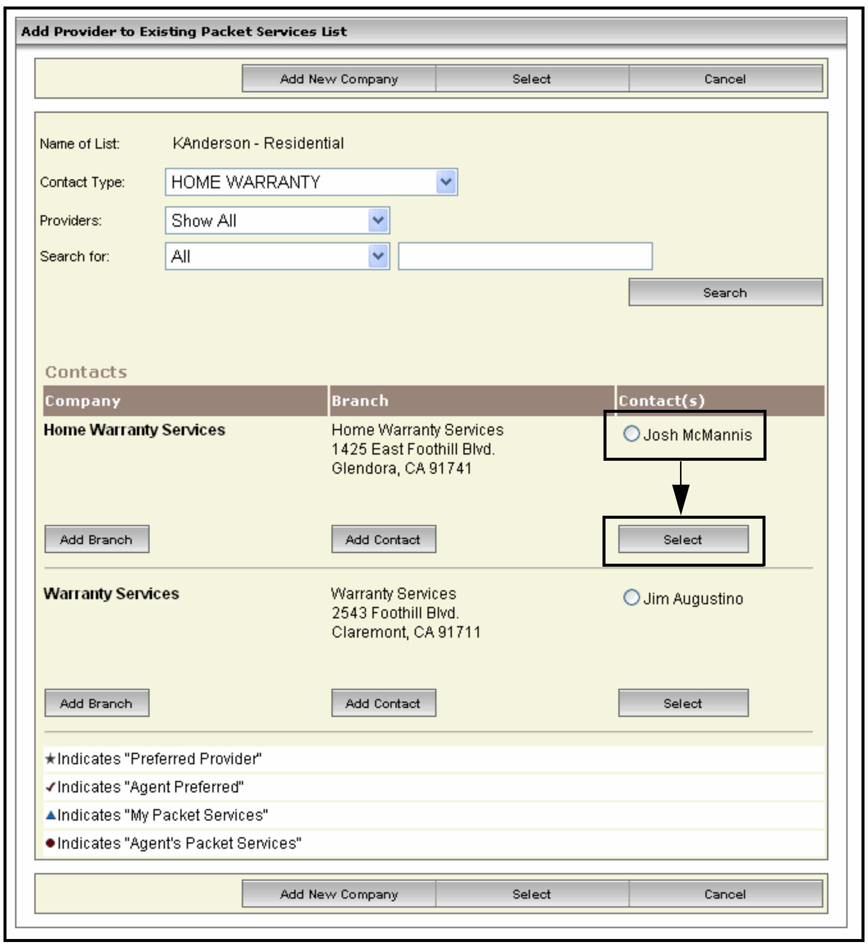
2. In the window for selecting a provider, enter your search criteria:

- 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.

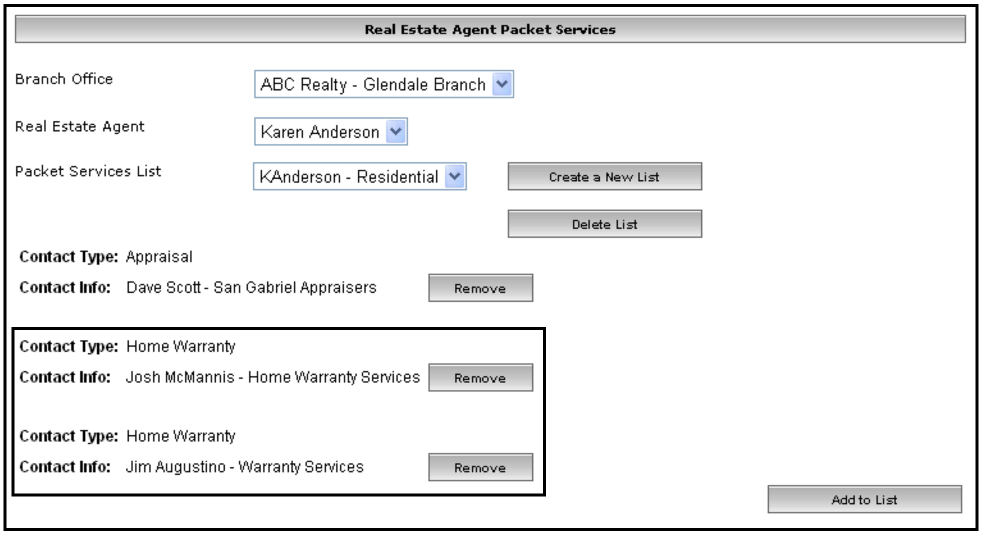


- Click **Search**. From the list of providers displayed, choose a contact by selecting the option button for that name, then click **Select**.



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

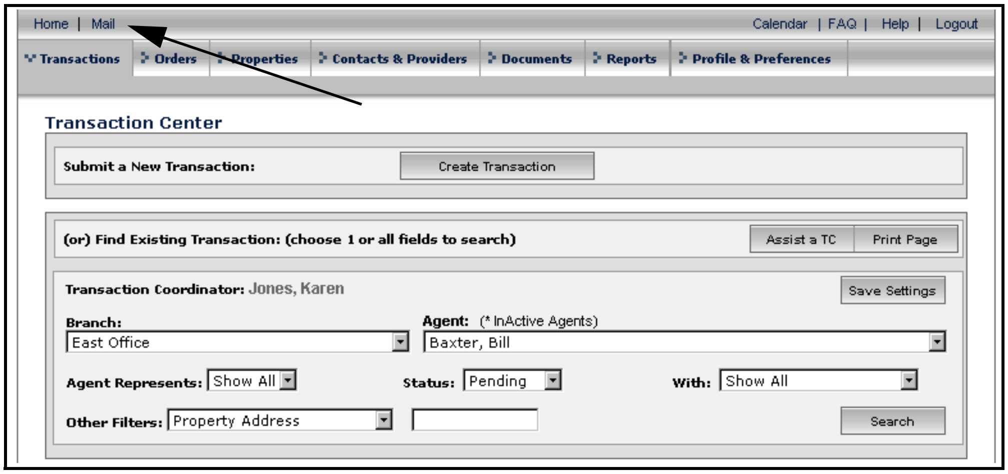
After completing these steps, the packet services list will display the multiple providers selected for that category.



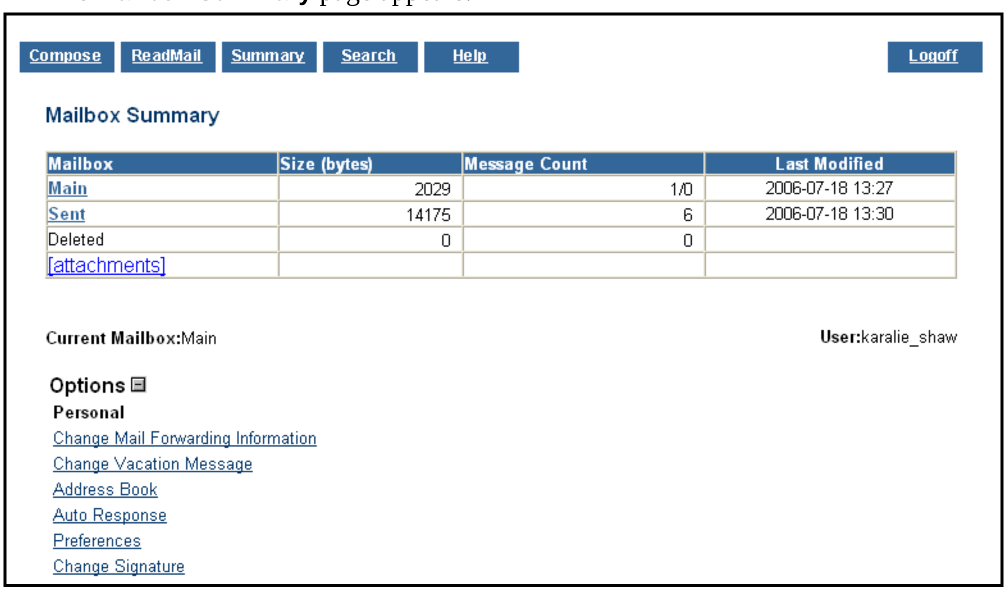
Mail Center

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.



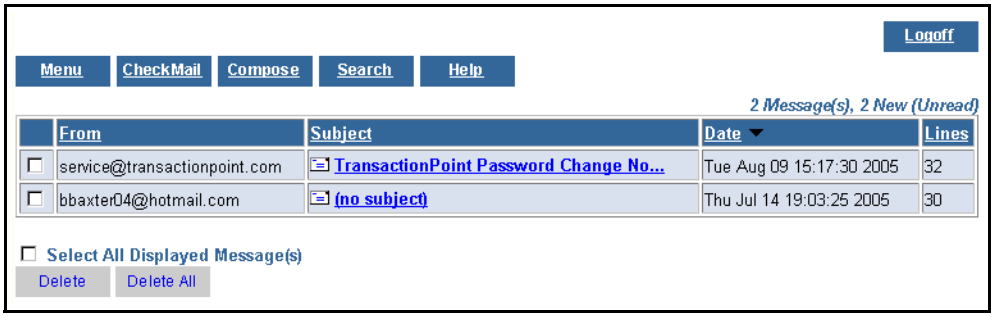
The **Mailbox Summary** page appears.



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.

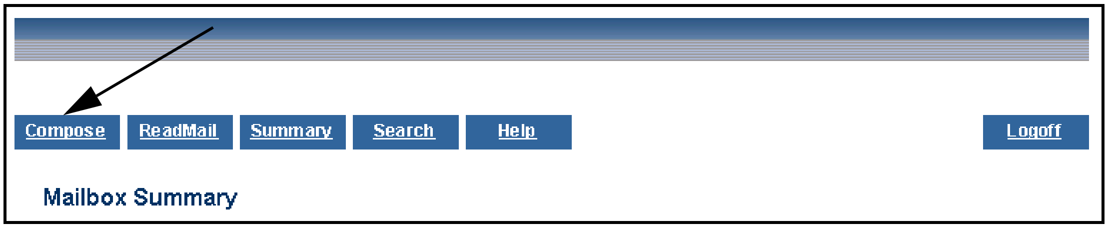
4. Click the **Delete** button.

Composing and Sending a Message

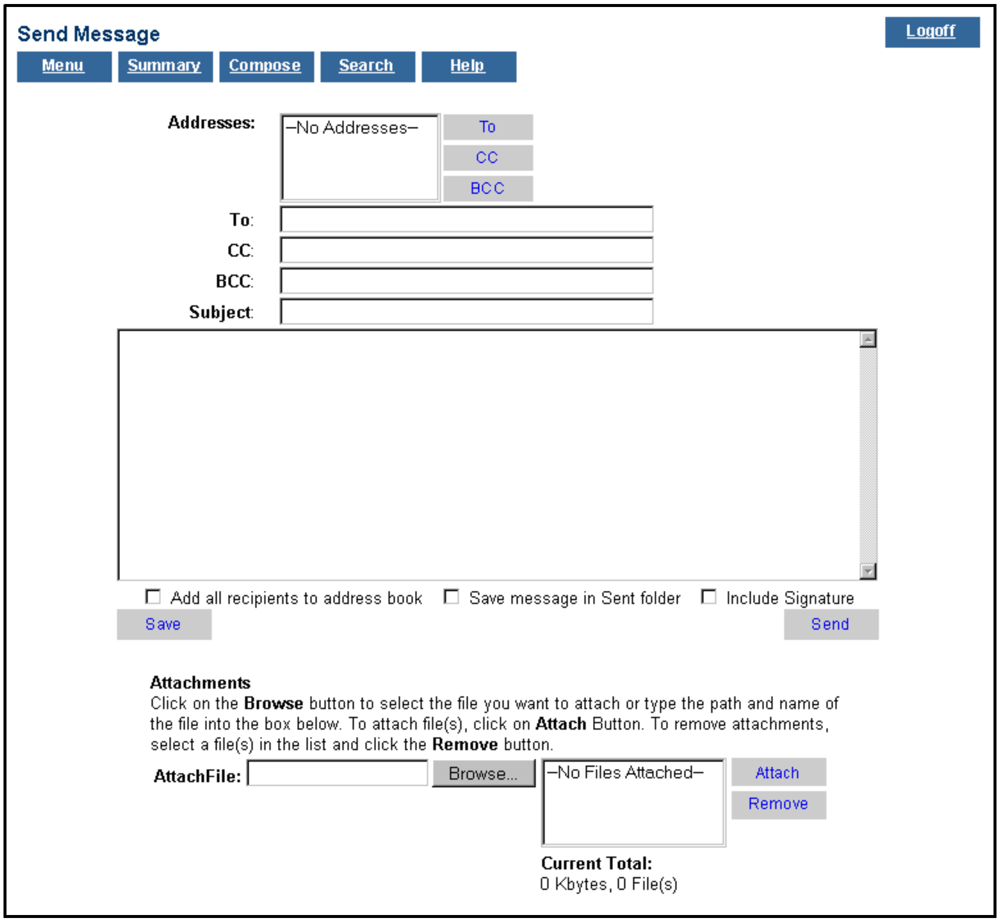
The function of sending an email message is labeled **Compose**.

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.



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.

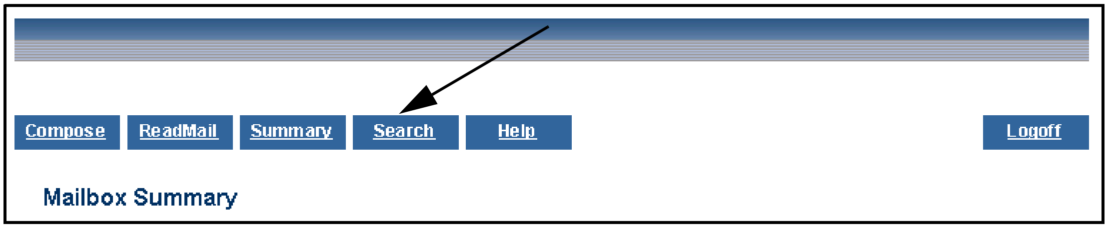
   c. To remove an added attachment, select that file in the **List of Files Attached** field, and click **Remove** to disconnect the file from the message.

10. Click **Send**. The message and any attachments are sent to all recipients.

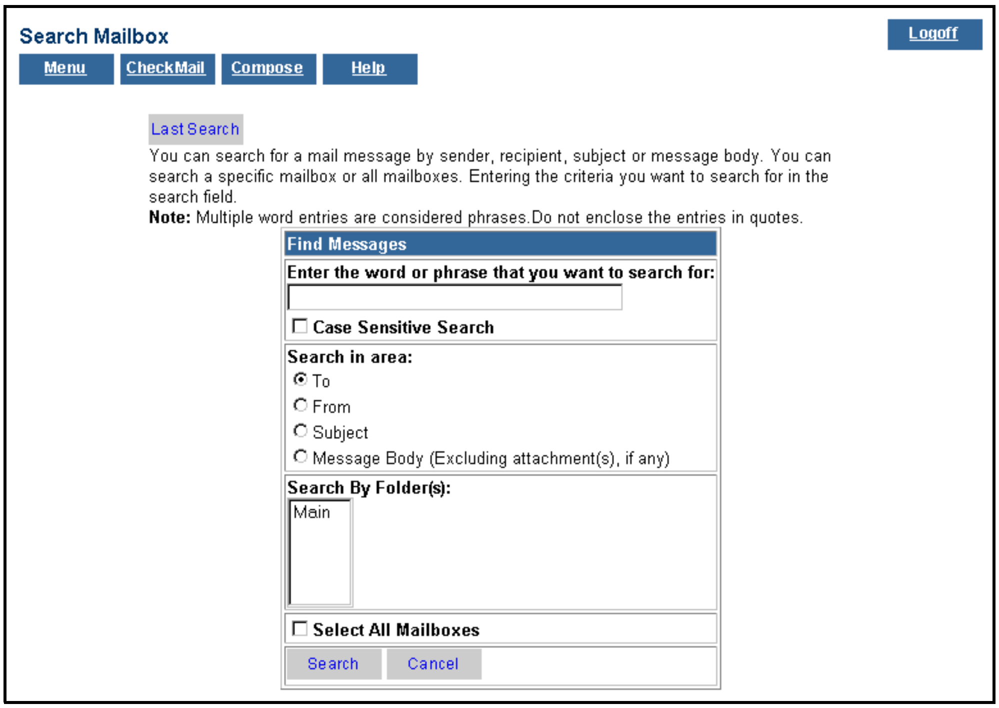
Searching for Mail

1. Access the **Mailbox Summary** page.

2. Click **Search.**



The **Search Mailbox** screen appears.

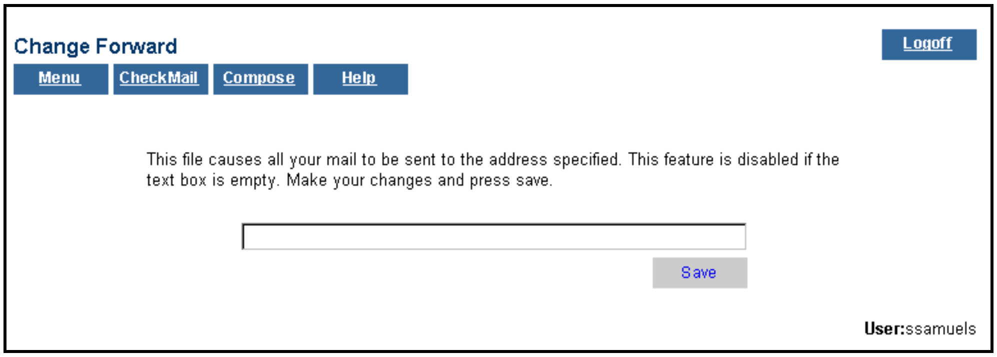


3. Enter the search criteria and click **Search** to locate the mail message.

Changing Mail Forwarding Information

1. Access the **Mailbox Summary** page.

2. Click **Change Mail Forwarding Information**. The **Change Forward** screen appears.

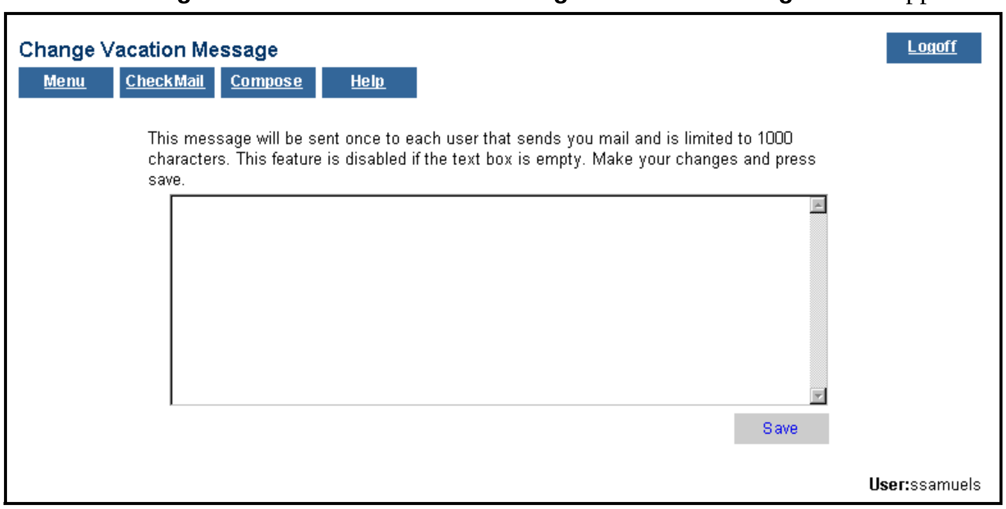


3. Type the forwarding email address and click **Save**.

Changing Your Mail Vacation Address

1. Access the **Mailbox Summary** page.

2. Click **Change Vacation Address**. The **Change Vacation Message** screen appears.

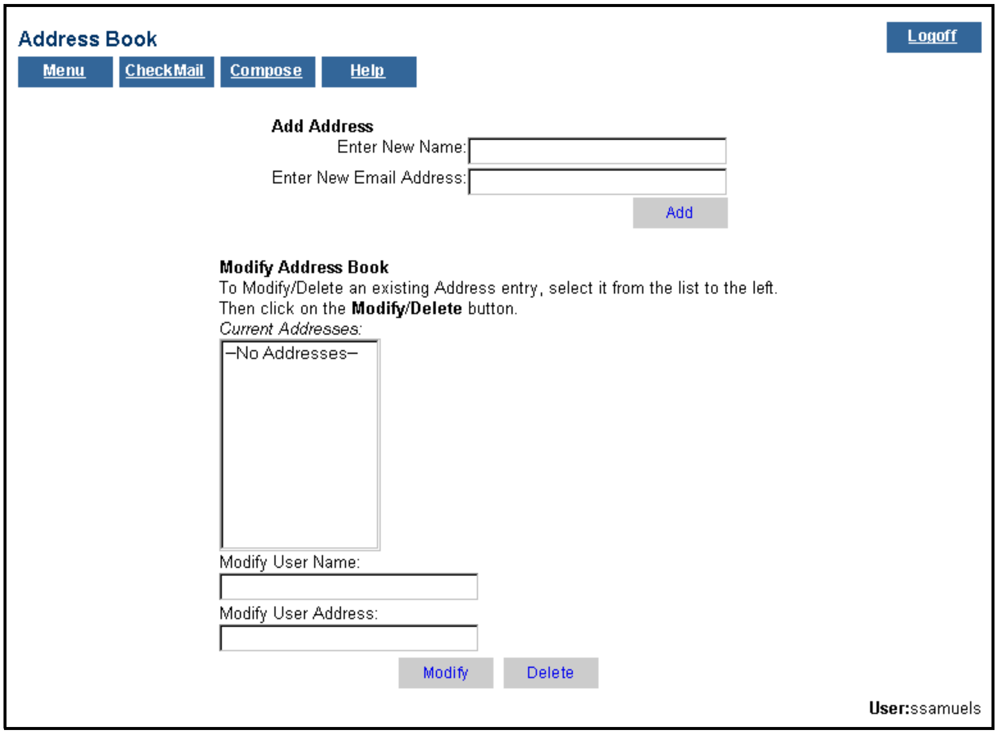


3. Type your vacation message and click **Save**.

Changing Your Mail Address Book

1. Access the **Mailbox Summary** page.

2. Click **Address Book**. The **Address Book** screen appears.



3. **Add, modify**, or **delete** your address book entries.

Changing Your Mail Auto Response

1. Access the **Mailbox Summary** page.

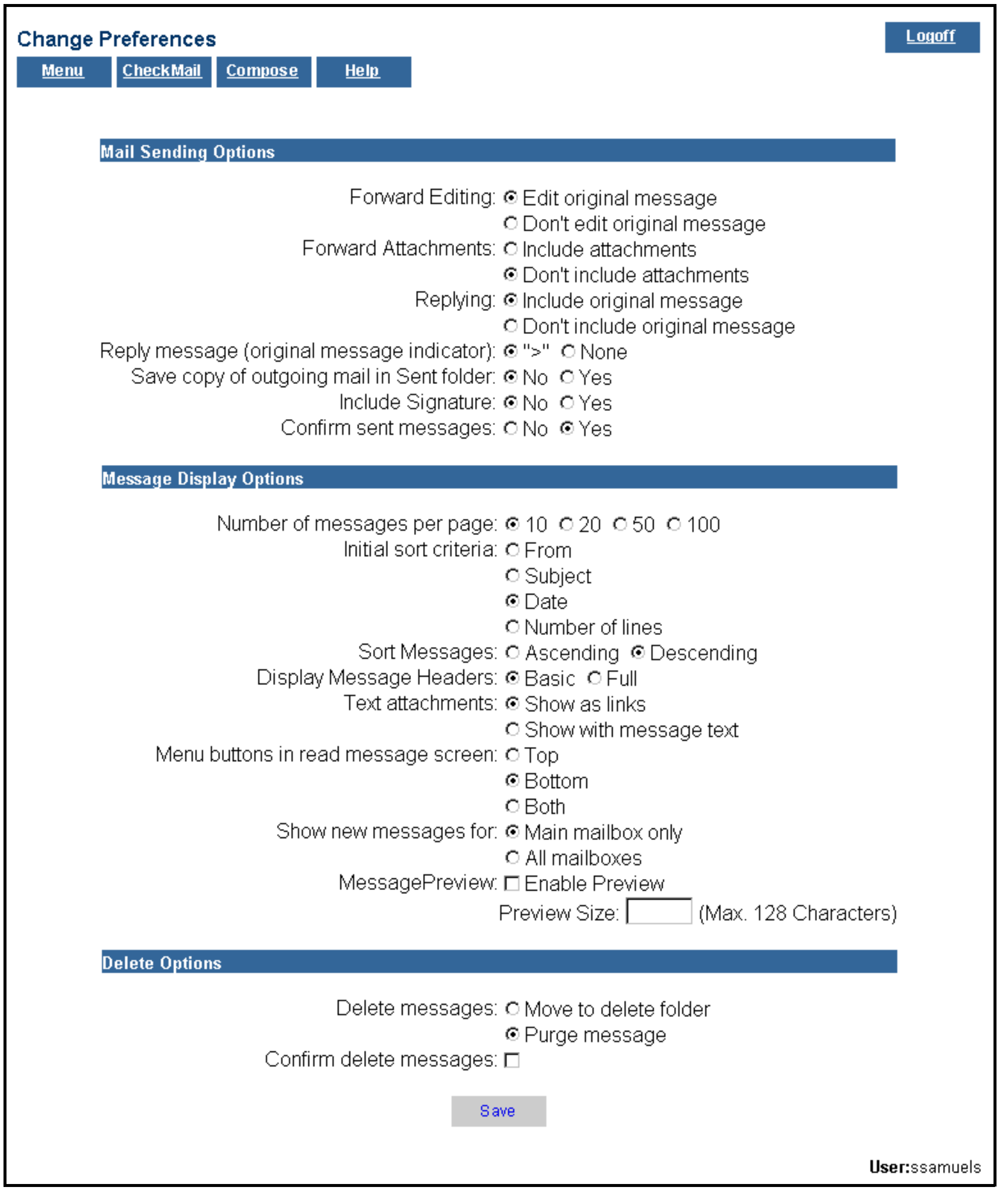
2. Click **Auto Response**. The **Auto Response** screen appears.

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.



3. Change your preferences, as appropriate, and click **Save**.

Changing Your Mail Signature

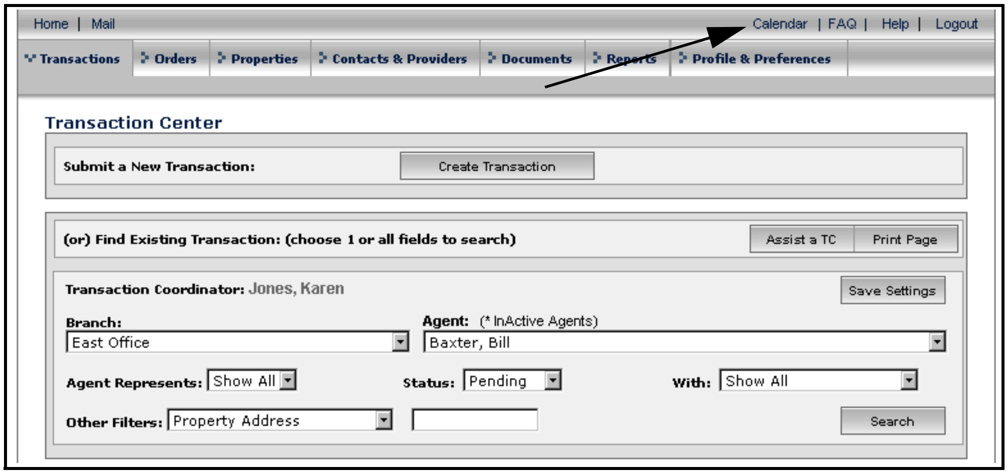
1. Access the **Mailbox Summary** page.

2. Click **Change Signature**. The **Change Signature** screen appears.

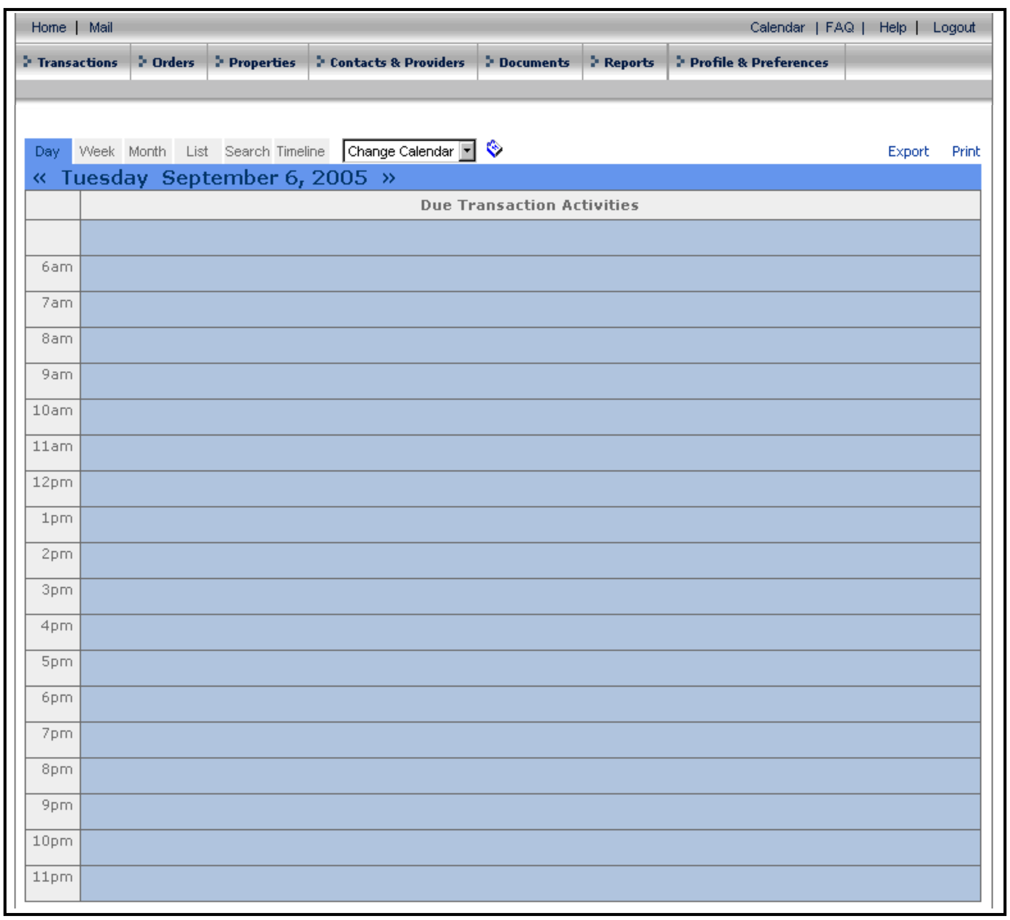
3. Enter the information and click **Save**.

Calendar

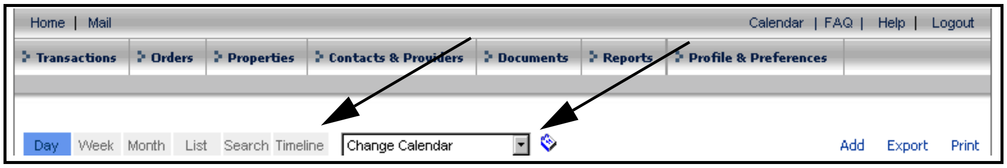
To access the Calendar, click **Calendar** in the top navigation toolbar.



The **Calender** screen appears.



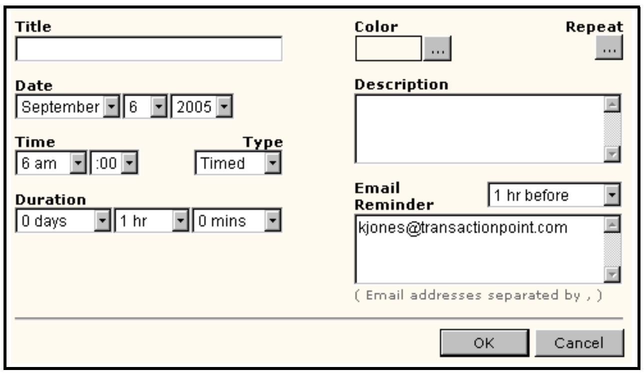
Use the Day, Week, Month, List and Timeline buttons to change the calendar view. Use the **Change Calendar** list to switch between **Due Transaction Activities** and **My Calendar**.



Adding an Event

Note: You can only schedule items using **My Calendar**.

1. Click **Add**. The **New Event** page appears.

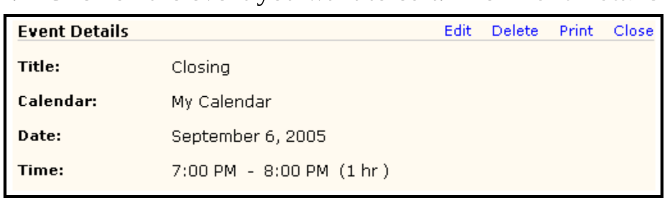


2. Complete the **Event** fields.

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.



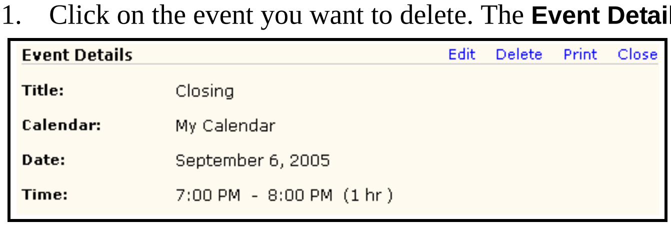
2. Click **Edit**.

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.

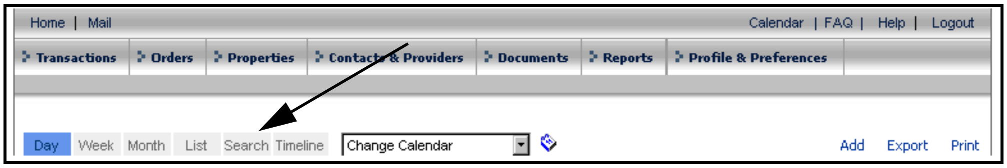


2. Click **Delete**. A confirmation screen appears.

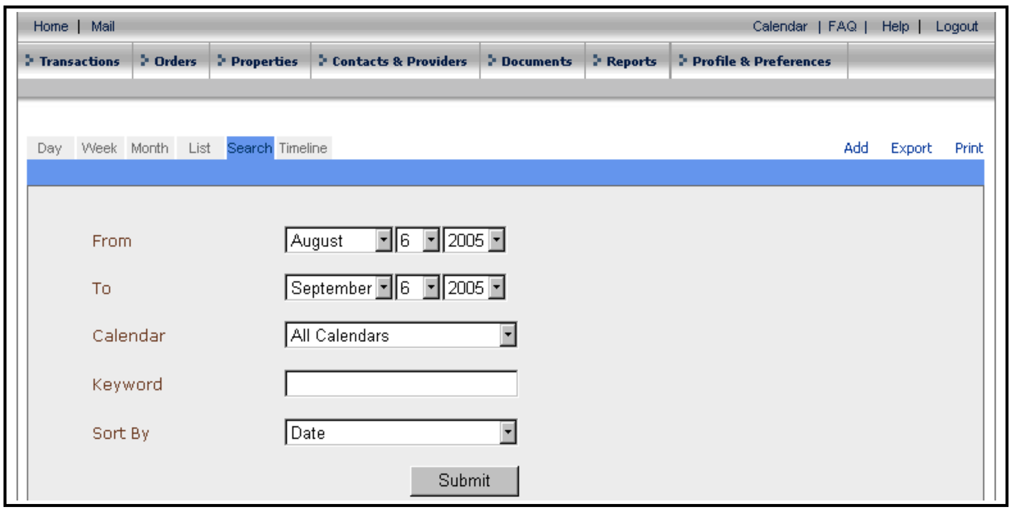
3. Click **OK**.

Searching the Calendar

1. Click **Search** at the top of the calendar.

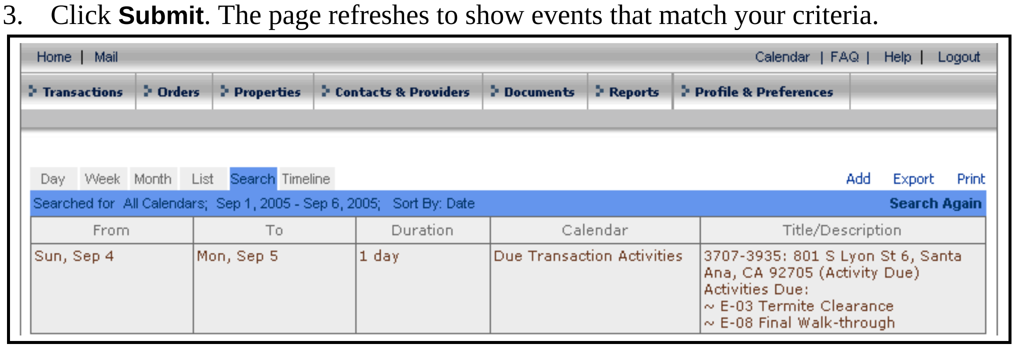


The **Calendar Search** page appears.



2. Enter the search criteria.

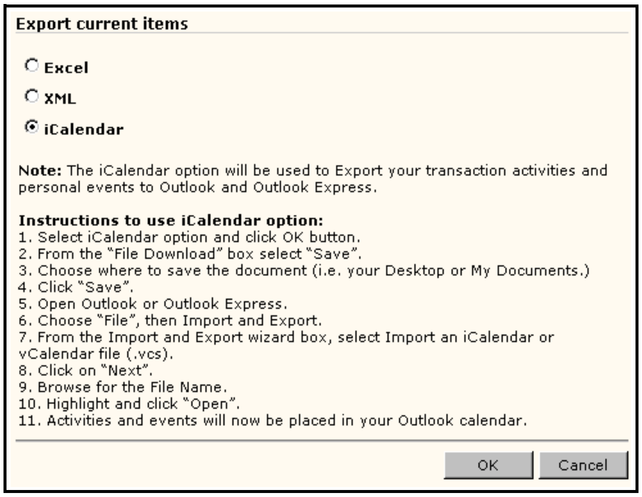
3. Click **Submit**. The page refreshes to show events that match your criteria.



Exporting Calendar Entries

You can export transaction activities and personal events to Microsoft Excel®, XML or iCalendar format. Use the iCalendar format to export to Microsoft Outlook® or Outlook Express®.

1. In the Calendar, click **Export**. The **Export current items** page appears.



2. Select the format.

3. Click **OK**.

4. Click **Save**.

5. Select where you want to save the file.

6. Click **Save**.

Index

A

B

C

D

E

F

G

H

I

L

M

O

P

R

S

T

U

V

W